

Living on the edge:

The impact of travel costs on low paid workers living in outer London

full report





Living on the edge: The impact of travel costs on low paid workers living in outer London

Research report for London Councils, London TravelWatch and Trust for London

December 2015

Research carried out by BDRC Continental

Table of Contents

| | |
|--|----|
| 1. Executive summary | 1 |
| Key findings..... | 1 |
| 2. Background and research methods | 6 |
| 2.1 Background | 6 |
| 2.2 The research | 10 |
| 2.3 Scope of the research | 11 |
| 2.4 Research methods | 12 |
| 3. Main findings..... | 17 |
| 3.1 Transport behaviour | 17 |
| 3.1.1 Zones worked in | 17 |
| 3.1.2 Modes of transport used to get to work and job interviews..... | 21 |
| 3.1.3 Time spent travelling to work..... | 27 |
| 3.2 Travel choices..... | 31 |
| 3.2.1 Reasons for using current commuting transport modes..... | 31 |
| 3.3 Transport costs | 42 |
| 3.3.1 Monthly travel expenditure | 42 |
| 3.3.2 Number of hours worked to pay for daily transport costs | 47 |
| 3.3.3 Impact of commuting costs on other household expenditure..... | 48 |
| 3.3.4 Perceptions of travel costs | 53 |
| 3.4 Paying for travel..... | 54 |
| 3.4.1 Methods used..... | 54 |
| 3.4.2 Jobcentre Plus Travel Discount..... | 55 |
| 3.5 Potential Improvements..... | 57 |
| 3.6 Other issues raised | 60 |
| 4. Conclusions | 63 |

1. Executive summary

London has a world-class public transport system with an extensive and comprehensive network, and higher levels of accessibility to public transport compared to the rest of England. However, in recent years, rising housing costs in inner London mean there has been a noticeable increase in the number of people working in low income jobs who live in outer London yet still travel to work in central London because that remains the main centre of employment. The relative cost and accessibility by public and private transport might limit the type and location of employment that jobseekers living in outer London¹ are likely to consider.

London TravelWatch, London Councils and Trust for London wanted to better understand the choices people in work in low income jobs and jobseekers living in outer London have to make about how to travel to work. The project partners also wanted to understand the impact these choices have on quality of life as well as how they relate to choices about where to live, where to work, and how much they can afford to spend on other essential expenditures that may affect their access to work.

We interviewed 2,854 Londoners, representative of the London population as a whole, held eight focus groups and 17 in depth interviews for more qualitative insights.

Key findings

- Most people living in London are resigned to the high cost of travel; they need to get to work and have no choice but to put up with the costs involved because they lack viable alternatives.
- 64% of all Londoners who commute to zone 1, which equates to around 1 million people - tend to choose the quickest or best journey available to them to get to work, including many people on a lower income. 36%, or a projected 500,000 commuters, are not using the quickest or best journey option available to them.
- However, travel cost is one of the main factors in the route chosen by one in four, or a projected 180,000 people, commuting to Zone 1 from outer London and the equivalent of around 145,000 workers living in outer London choose the cheapest route to work rather than the shortest or most convenient.
- 9%, or a projected 70,000, outer London residents who commute to zone 1 could get to work faster if they spent more.
- Over one in five, or a projected 156,000, commuters who commute from outer London to zone 1 have to cut other spending to pay for travel to work.
- London residents earning more than £600 per month have to work approximately 20 minutes every day they work to pay for that day's commuting costs. This increases sharply to 54 minutes for those earning £200 to £599 and 1 hour 56 minutes for those earning less than £200.

¹ For this report, outer London is the 14 boroughs situated around the edge of the Greater London Authority area plus the boroughs of Brent, Ealing, Haringey, Barking & Dagenham and Merton.

- Travel to work accounts for almost one tenth of a manual worker's average earnings.
- Lower earners are more likely to use the bus and some choose this method to reduce their travel expenditure.
- Everyone is concerned about rising travel costs but people on low incomes are worried that further increases could affect their ability to earn a higher salary by working in Zone 1.

The context – poverty in London

The profile of poverty (where someone is in poverty if they earn less than 60% of median income after housing costs) in London has changed. Traditionally, the dominant picture of poverty has been of people who are out of work and living in social housing in inner London, but this is changing to one of more people in low income jobs living in private rented housing in outer London. *London's Poverty Profile*² reveals that:

- There are currently 2.25 million people living in poverty in London, a figure which has risen from 1.9 million a decade ago.
- 10 years ago, of the London residents living in poverty, half were in inner London and half in outer London, but the percentage in inner London has now fallen to 42% and risen to 58% in outer London. This now represents 1.3 million people in outer London compared to 940,000 in inner London.
- Unemployment in London is at its lowest level since 2008, however the past decade has seen an increase in the number of working-age adults in poverty from 1.1 million to 1.4 million, with the large part of this rise among working families. 60% of children and working-age adults in poverty now live in a household where someone is in work.
- The number of part-time workers who wanted, but could not find, full-time employment grew by 87% over the period from 2004 to 2012, however underemployment (i.e. people lacking work or not working as many hours as they would like) fell by 1.7 percentage points between 2013 and 2014.
- 21% of London residents are paid below the London Living Wage, which was £9.15 per hour in 2013/14. The number of low-paid jobs increased for the fifth consecutive year to 690,000 in 2014, representing a 13% increase on 2013. 43% of part-time jobs and 11% of full-time jobs are low paid.

The research

Three different research methods were employed to gather both new quantitative and qualitative data.

- 3 waves of a London omnibus survey completed by 2,854 respondents
- 8 focus groups with 6 participants per group
- 12 depth interviews with individual jobseekers living in outer London
- 5 depth interviews with individuals whose first language is not English.

The disproportionate effects of travel costs

On average, London workers spend around £100 per month, or 7.3% of their monthly earnings, on travel to work. Higher earners spend 6.8% of their individual income on transport, compared to 9.2% for lower earners.

Widespread resignation about the cost of travel

Travel costs are perceived as high, but commuters are resigned to paying these costs as there is little choice other than to increase their journey time to Zone 1 or find potentially lower-paying work locally in outer London.

People who live in London are concerned about the rising cost of travel in the future. With this in mind, lower earners may be more prepared to choose a longer, cheaper commute or reluctantly accept lower-paying work locally.

The journey time differential

Two-thirds of London commuters want the quickest and best journey to work, regardless of cost. The average journey time for London commuters is 45 minutes, increasing to 57 minutes for those commuting from an outer borough to Zone 1. Lower earners are more likely to use the bus spending, on average, 26 minutes on buses versus 20 minutes for higher earners.

Bus users are more likely to choose their route because of cost. Bus-only usage is higher among those earning less than £1,750 per month (10-12% compared to 5-7% for those earning more). However, bus-only journeys from outer boroughs to Zone 1 are impractical and may only be possible when working off-peak.

There are limited route choices to get to work from outer London in a reasonable amount of time. Any attempts to lower costs often involve longer journey times. This might involve substituting a bus journey for a walk, or train for a bus. Opportunities to travel by bus are greater for those who can travel to work off-peak, for example those who usually start work later in the day or who are informally allowed some late starts.

Travel costs and quality of life

One in five have to compromise spending on other household expenditures to pay for travel costs (with an almost equal share between utilities, looking for special offers when food shopping, clothes shopping, socialising and making non-essential purchases), because there is little scope for reducing travel costs.

Conclusions

The majority of people are choosing the quickest and most convenient transport to get to work. However, a significant number of people in work on a low income living in outer London are choosing a cheaper, rather than a quicker commute to work in central London. There is a widespread sense of resignation about the cost of travel in London, as well as a concern about how people on a lower income will cope with rising travel costs in the future. These findings have implications for the London economy in that the lowest earners in the capital are less able to take full advantage of the transport network to access job opportunities. Compromises are being made in other household expenditures to cover travel costs. More research and monitoring are needed on the travel choices available to the lowest earners in London and to ensure that public transport is affordable to all those living and working in London.

Research participants suggested several potential improvements which might ease transport costs for those living and working in London on lower incomes.

- **Concessionary fares**

Low-income earners could benefit from a concessionary fare, similar to existing discounts and concessions, to reduce the burden of travel costs. Over one in five research participants support this. Participants also recommended tax-free transport tickets for people on low incomes.

- **Improving awareness of existing discounts**

Those living and working in London on a low income could benefit from an improved promotion of existing travel discounts, such as the recently reduced daily cap for Oyster and contactless card users to one fifth of the cost of a seven-day Travelcard to benefit part-time workers. Participants in this research would appreciate such flexible ticketing to accommodate working from home.

Similarly, jobseekers could be more consistently made aware of the Jobcentre Plus Travel Discount. The research reveals mixed levels of awareness and usage. Without exception, participants viewed it positively as something to help with getting to interviews, helping in the first few months of employment and offering a social lifeline when unemployed.

- **Season tickets and Travelcards**

Research participants would like it to be easier to obtain season ticket loans, including for a part-time season ticket offering lower prices for workers travelling less than five days a week. Participants also supported assistance or a subsidy to pay for weekly or monthly season tickets

Off-peak Travelcards could be reinstated to benefit flexible working schedules, especially for those commuting from the outer boroughs to central London, which may also help to relieve congestion during peak times. Research participants said they would appreciate fares to incentivise those able to travel off-peak.

While it may be difficult to secure such benefits in the current economic climate, we think it is important that decision-makers understand the impact that fare levels can have on the choices made by those on low incomes.

- **Other potential improvements**

Employers could be encouraged to cover the cost of travel to job interviews, with successful applicants reimbursed only when they start the job.

Transport for London could give more prominence to the 'one more journey' facility on Pay As You Go Oyster and contactless card payments, similar to that available on London buses.

Bus and train services could be extended for travel in the early morning, late evening, night and at weekends. This would benefit people in low-paid jobs, which may tend to start and finish outside traditional hours.

Project partners

- **London TravelWatch** is the independent consumer body responsible for representing the interests of all who use public transport in London. It is accountable to, and funded by, the London Assembly. It covers all modes of transport, and its work is underpinned by a series of statutory powers and duties.
- **Trust for London** is the largest independent charitable foundation funding work which tackles poverty and inequality in the capital. Each year, it provides around £7 million in grants and, at any one point, is supporting some 400 voluntary and community organisations.
- **London Councils** represents London's 32 boroughs and the City of London. It is a cross-party organisation that works on behalf of all of our member authorities regardless of political persuasion. London Councils makes the case to government, the Mayor and others to get the best deal for those living and working in London and to ensure that its member authorities have the resources, freedoms and powers to do the best possible job for their residents and local businesses.
- **BDRC Continental**, the UK's largest independent research consultancy was commissioned to conduct the research.

2. Background and research methods

2.1 Background

Commuting and seeking work in London

London has a world-class public transport system with an extensive and comprehensive network, and relatively high levels of accessibility to public transport when compared to the rest of England. However, in recent years, there has been a noticeable increase in the number of people working in low-paid jobs who, although they live in outer London, still travel to work in central London because that remains the main centre of employment. As a result, many people in work on a low income living in outer London are having to make difficult travel and financial decisions, weighing up the monetary and time-related costs associated with different modes of public transport to get to work in central London.

Balancing the relative time and monetary costs for transport also presents a barrier for some jobseekers living in outer London who have to consider whether they can afford the time and/or monetary costs of public transport to attend job interviews. According to Transport for London [2014], “two out of five jobseekers say that a lack of transport acts as a barrier to getting work, and one in four say that the cost of transport presents a problem with getting to interviews.”³ Those jobseekers who use the JobCentre Plus Travel Discount, which offers a 50% reduction in travel costs, must also consider how they will manage to pay full fare once they are in employment and therefore no longer eligible for discounted fares. In any case, the relative costs and accessibility by public and private transport might limit the type and location of employment that jobseekers living in outer London are likely to consider.

Poverty, unemployment and underemployment

The profile of poverty in London has changed. Traditionally, the dominant picture of poverty has been of people who are out of work and living in social housing in inner

³ Transport for London (2014). *Understanding the travel needs of London's diverse communities: A summary of existing research.*

London, but this is changing to one of more people in low-paid jobs living in private-rented housing in outer London.

London's Poverty Profile, produced every two years for Trust for London by The New Policy Institute, takes a comprehensive look at the shifting and emerging trends for low income earners in London, and the report has greatly informed the context for this research. The following findings are from *London's Poverty Profile 2015*⁴, unless otherwise noted.

There are currently 2.25 million people living in poverty in London, a figure which has risen from 1.9 million a decade ago. London has experienced an increase in in-work poverty, with more people in low paid, part-time work. The good news is that unemployment in London is at its lowest level since 2008, with 75,000 fewer unemployed adults between 2013 and 2014.

Similarly, underemployment (i.e. people lacking work or not working as many hours as they would like) fell by 1.7% between 2013 and 2014. 15%, or 880,000 people, of working-age Londoners were underemployed, with a further 6%, or 360,000 people, being economically inactive but wanting work. It should be noted that between 2004 and 2012, the number of part-time workers who wanted, but could not find, full-time employment grew by 87%, from under 100,000 people in 2004 to 188,000 in 2012.⁵

But despite the drop in unemployment and underemployment, the past decade has seen an increase in the number of working-age adults in poverty from 1.1 million to 1.4 million, with a large part of this rise among working families. 60% of children and working-age adults in poverty now live in a household where someone is in work. There are fewer people in workless households and a smaller proportion of people in households where all adults work, however there has been an increase in households where some work.

⁴ Trust for London (2015). *London's Poverty Profile 2015*

⁵ Trust for London (2013). *London's Poverty Profile 2013*.

Low-paid work

London's Poverty Profile defines low-paid work as being below the London Living Wage as set by the Greater London Authority. The London Living Wage rose to £9.40 per hour in October 2015. By comparison, the national Living Wage is £8.25 per hour and the national minimum wage is £6.70 per hour for people aged 21 and over, and £5.30 for 18 to 20 year olds. Employers are legally obliged to pay the minimum wage, but not the Living Wage, either in London or nationally.

In London, 21% of all employees are paid below the London Living Wage; this represents 75% of 16-20 year olds, 40% of 21-24 year olds, and 20% of older age groups. The number of low-paid jobs increased for the fifth consecutive year to 690,000 in 2014, representing a 13% increase on 2013. Nearly half of all low-paid jobs in the capital are in the hospitality and retail sectors. The number of part-time jobs paying below the London Living Wage increased by nearly 5% from 2013 to 2014 to 43%; while just over 11% of full-time jobs were low paid in 2014.

The capital has also seen a change in the dynamics of poverty and its geographical dispersal. In the 10 years to 2013, the proportion of Londoners in poverty living in outer London grew from 50% to 58% whilst the proportion in inner London fell from 50% to 42%.⁶ This now represents 1.3 million people in outer London compared to 940,000 in inner London.

Alongside the shift of poverty from inner to outer London, there has been a change in the tenure of low income earners from social- to private-rented accommodation. A decade ago, more than half of Londoners in poverty lived in social-rented accommodation. 10 years on, the number of people in poverty in social-rented accommodation has fallen by 100,000 to 810,000, whereas the number living in private-rented accommodation has more than doubled, rising to 860,000. The private-rented sector now has a larger share of people in poverty, at 38%, than the social-rented sector at 33%.

⁶ Trust for London (2013). *London's Poverty Profile 2013*.

Accessibility and affordability of public transport in London

The issue of transport affordability in London is important given the relatively high cost of travel on London's extensive public transport network and the growing gap between those who can easily afford its cost and those who have more trouble doing so.

According to the Department for Transport, the affordability of transport can be defined as "the extent to which the financial cost of journeys puts an individual or household in the position of having to make sacrifices to travel or the extent to which they can afford to travel when they want to."⁷

Overall household costs are 18% to 47% higher in London than outside the capital, varying by household type. This higher figure comes mainly from housing and childcare costs, but other areas of expenditure, such as transport, can add to the high cost of living in London. People in London working on the national minimum wage also fall short, with disposable incomes between half and three-quarters of what they need.⁸

There has been much research into the broader relationship between transport and social exclusion, stemming particularly from the seminal report *Making the connections: Final Report on Transport and Social Exclusion* produced by the Social Exclusion Unit in 2003. Research on social exclusion has looked at the ways in which the planning of transport services can be improved to reduce exclusion from employment, health, education, leisure and social opportunities. It should be noted that Transport for London has successfully put into place many of the recommendations suggested by the various publications on the subject and adopted strategies to reduce exclusion in the capital. However there are still low income Londoners who find it more difficult than the average Londoner to access employment opportunities. As such, this particular research has employed a narrower focus to investigate the travel decisions made by lower income earners in London to access employment.

⁷ Department for Transport (no date). *Social exclusion and the provision of public transport: Main report*

⁸ Trust for London (2015) *A Minimum Income Standard for London*, May 2015

2.2 The research

London TravelWatch, Trust for London and London Councils wanted more insight into the choices people working in low income jobs and jobseekers living in outer London have to make about how to travel to work and job interviews.

BDRC Continental was commissioned to carry out qualitative and quantitative research, to:

- Understand the impact that these choices have on quality of life
- Understand how these choices relate to decisions of where to live and where to work
- Understand how much low earners in outer London can afford to spend on other essential expenditures that may affect their ability to take up work e.g. childcare
- Identify whether the time and/or monetary cost of commuting is a barrier to finding work for jobseekers living in outer London
- Identify whether there are any disparities between different areas of outer London in terms of travel options available to workers on low incomes and the relative costs of these

As such, the research sought to answer the following questions:

- How are the travel choices of people in work on low incomes living in outer London affected by the cost and local availability of public and private transport in London?
- Does the potential cost of travel to work and/or journey time influence the decision jobseekers living in outer London make about whether or not to apply for or accept jobs?
- What conclusions can be drawn about the travel choices made by people in work on low incomes living in outer London? What is the impact on their quality of life and the decisions they may make about other related issues, such as where to live, where to work and expenditure on other household expenses?
- Are there any disparities between the different areas of outer London in terms of the transport options available to low income workers and their relative cost?
- What remedies might help people in work on a low income and jobseekers in outer London facing these difficult travel decisions?

2.3 Scope of the research

The researchers were asked to recruit research participants that reflected the characteristics of low-income workers and jobseekers living in outer London who use the transport network in and around London to get to work or seek employment.

The research focused on low-income earners and jobseekers living in outer London due to the rise in the number of people in poverty living there. In addition, it also focuses on those commuting to work in Zone 1, since this remains the traditional centre of employment in London. *London's Poverty Profile* finds that central London boroughs have the lowest rates of low paid jobs in London, yet inner London still accounts for 47% of all low paid jobs in London, due to the geographic concentration of jobs.

Outer London boroughs were divided into four geographic areas:

| North | East | South | West |
|----------------|--------------------|----------------------|----------------------|
| Barnet | Barking & Dagenham | Bromley | Ealing |
| Brent | Bexley | Croydon | Harrow |
| Enfield | Havering | Kingston-upon-Thames | Hillingdon |
| Haringey | Redbridge | Merton | Hounslow |
| Waltham Forest | | Sutton | Richmond-upon-Thames |

Low income Londoners recruited for the research could either be in work or unemployed. Low income earners are defined by their National Readership Survey (NRS) social grade, which is a system of demographic classification in the United Kingdom. They were originally developed by the NRS to classify readers, but are now used by many other organisations for wider applications and have become a standard for market research. They were developed 50 years ago and their definition is now maintained by the Market Research Society in Britain.

The classifications are based on the occupation of the chief household earner as follows:

| Grade | Definition |
|--------------|--|
| A | Higher managerial, administrative or professional |
| B | Intermediate managerial, administrative or professional |
| C1 | Supervisory or clerical and junior managerial, administrative or professional |
| C2 | Skilled manual worker |
| D | Semi-skilled and unskilled manual workers |
| E | Casual or lowest grade worker, pensioner and other who depends on the welfare state for their income |

For this research, higher-income earners are classified as being in social grades A, B and C1 (ABC1), lower-income earners are classified by grades C2 and D (C2D), whilst unemployed people are classified as grade E.

Private vehicle users

Despite the prevalence of private vehicle use among outer London residents, the research chose not to focus on car usage since it was assumed that the London congestion charge for vehicles coming into central London would be prohibitively expensive for low income earners and jobseekers. Therefore, the chosen focus is on public transport and walking and cycling instead.

2.4 Research methods

In order to achieve the research objectives, different methods were employed to gather both quantitative and qualitative data.

Quantitative research

The quantitative research method used was a London omnibus survey, representative of the adult population in London. This is an online self-completion survey, covering all London boroughs and including Londoners aged 16+. The eight questions asked were included in an omnibus survey issued on three consecutive occasions to obtain

sufficient sample sizes of low income earners in outer London to withstand statistical scrutiny. These were completed by 2,854 Londoners, providing a robust base with which to conduct further analysis amongst various sub-groups. The fieldwork was conducted between 2 and 29 September 2015.

The weighting matrix for the omnibus survey (to make it representative) is based on the 2011 Census data (and 2014 mid-population estimates). The matrix for social grades derives from the Target Group Index survey 2015.

Data has been analysed based on various attributes, including borough, predicated on respondent postcodes recorded in the omnibus survey.

Part of the detailed analysis in this report is by monthly income. At figures 10, 14 and 15 data is provided to show results by monthly income bands. In these figures an indication is provided to show where the monthly National Minimum Wage (NMW) (£1,166) and London Living Wage (LLW) (£1,636) sits, calculated on a per month salary based on a 40 hour week before tax. It should be noted that the quantitative research data is collected based on monthly income after tax. It also includes Londoners who work part time, therefore lower monthly income earners may not necessarily be paid below the hourly NMW or LLW rate, but are low earning because they work for few hours.

The quantitative research was designed to ensure robust sample sizes for analysis. As the survey is conducted with a sample of the target audience, one cannot guarantee that a census of the whole population (or segment) would yield the same results. We can be 95% certain that the actual figure (in the population as a whole) falls within a certain range of the survey figure. The percentages in the table below represent the error variance for a number of base sizes.

| Base | Error variance at a 95% confidence level |
|-------------------------------|---|
| All respondents (n=2854) | +/- 1.8% |
| All London workers (n=2008) | +/- 2.2% |
| Outer London workers (n=1194) | +/- 2.8% |
| All C2D workers (n=511) | +/- 4.3% |

Qualitative research

Two qualitative research methods were employed: focus groups and depth interviews. These methods are suitable for a deeper understanding of choices, influencers, impact and improvements with regard to travelling to work amongst low income earners in outer London. Focus groups were conducted amongst those in work and depth interviews amongst jobseekers and low income earners whose first language is not English.

A total of eight focus groups and 17 depth interviews were carried out: 12 with jobseekers and five with people in employment whose first language is not English.

Focus groups

The focus groups were conducted in central London between 17 and 24 September 2015. Respondents in the focus groups fulfilled the following criteria:

- Living in an outer London borough
- Working in central London (travel to TfL fare zone 1)
- Living in private- or social-rented accommodation
- Social grade C2 or D, ensuring that they generate income through regular work
- Having considered a different or additional job in the past two years, or having moved to an outer borough and remained in the same job, or having had a change of circumstances within the same job (ensuring that respondents had recently considered their commuting options from an outer borough into central London)

Participants were grouped to ensure a variety of respondents in each focus group.

Each group sought to include:

- Some respondents receiving social benefits
- A broad mix of living situation (e.g. living with partner / children, single parent, living with a dependent)
- A broad mix of transport modes used to get to work
- A broad mix of age and ethnicity

In order to be able to contrast between groups, focus groups were formed with similar characteristics. As such:

- Two focus groups were assembled for each outer London borough area (North, East, South and West)
- Half of the groups were all male; the other half all female. These divisions by gender were made to mitigate against any potential stigma felt about earning a low wage, especially for male participants.
- Half of the groups comprised participants living in social-rented accommodation, while the other half live in private-rented accommodation.

The composition of each focus group is shown below:

Group 1

- Live in North outer London borough
- All male
- Live in social-rented accommodation

Group 2

- Live in North outer London borough
- All female
- Live in private-rented accommodation

Group 3

- Live in East outer London borough
- All male
- Live in private-rented accommodation

Group 4

- Live in East outer London borough
- All female
- Live in social-rented accommodation

Group 5

- Live in South outer London borough
- All male
- Live in social-rented accommodation

Group 6

- Live in South outer London borough
- All female
- Live in private-rented accommodation

Group 7

- Live in West outer London borough
- All male
- Live in private-rented accommodation

Group 8

- Live in West outer London borough
- All female
- Live in social-rented accommodation

Depth interviews:

12 depth interviews were conducted between 17 and 25 September 2015 with people seeking employment. Depth interviews were chosen over focus groups because these respondents may be more inhibited to talk about their employment and financial situation in front of other people. Respondents filled the following criteria:

- Living in an outer London borough
- Living in private- or social-rented accommodation
- Social grade E and unemployed for more than three months
- Eligible for the Jobcentre Plus Travel Discount

Depth interview participants were selected to ensure a mix of living situation, age, gender and ethnicity.

Five additional depth interviews were conducted between 17 and 25 September 2015 with people with the same characteristics as focus group respondents, but whose first language is not English. They fulfilled all of the above focus group recruitment criteria. First languages spoken were Bulgarian, Hindi, Italian, Polish and Portuguese.

Responses from depth interview participants were largely similar and comparable to the views in focus groups. Individual case studies are used to demonstrate specific examples of views and behaviours and, where differences are detected, these are mentioned in the report separately.

3. Main findings

3.1 Transport behaviour

3.1.1 Zones worked in

Our survey findings showed 28% of all in work and working age London residents (16-64 years), almost 1.5 million people, work in TfL fare zone 1.⁹ Of these workers, lower-income earners are less likely to be working in Zone 1 (16% compared to 31% of higher earners). The proportion of London residents working in Zone 1 generally increases as monthly income increases: 36% earning £1,250 or more work in Zone 1 (peaking with 50% or more earning in excess of £2,500), whilst amongst those earning less than £1,250, this falls to 22% commuting to Zone 1. Younger workers (16-24 years) are the lowest earners.

The quantitative survey shows, by extrapolation from the sample size, that 22% of all London residents aged 16+ work in Zone 1. If this group of Zone 1 workers is re-proportioned to a tighter definition (taking other demographic data into account), it can be seen that amongst Londoners of typical working age (16-64 years), including all those in work, in education, seeking employment and economically inactive, 24% work in Zone 1.

As shown in Figure 1, 31% of 25 to 44 year olds work in Zone 1. Additionally, social class ABC1s are significantly more likely to work in Zone 1 (28%) compared to C2Ds (16%). Although not proven in research, this difference could be due to a greater concentration of ABC1 job types in Zone 1 and that ABC1s are more willing and able to commute to Zone 1.

⁹ Zone 1 is defined as the cities of London and Westminster, plus parts of all adjacent boroughs of Southwark, Lambeth, Kensington & Chelsea, Camden, Hackney, Islington and Tower Hamlets.

Figure 1. Proportion of all London residents aged 16+ by travel zone worked in, age and income group (%)

| Working location/status | All | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | ABC1 | C2D |
|--|-----|-------|-------|-------|-------|-------|------|-----|
| Zone 1 | 22 | 21 | 31 | 31 | 21 | 11 | 28 | 16 |
| Zone 2 | 10 | 11 | 16 | 12 | 10 | 6 | 12 | 11 |
| Zone 3 | 9 | 8 | 10 | 9 | 11 | 7 | 10 | 9 |
| Zone 4 | 7 | 7 | 7 | 10 | 8 | 4 | 6 | 10 |
| Zone 5 | 5 | 3 | 8 | 5 | 5 | 7 | 6 | 6 |
| Zone 6 | 4 | 1 | 5 | 4 | 4 | 4 | 5 | 3 |
| Zone 7 | 1 | - | 1 | * | 1 | * | 1 | * |
| Zone 8 | * | * | 1 | - | * | * | * | * |
| Zone 9 | * | - | * | * | * | - | * | * |
| No response | 4 | 6 | 4 | 3 | 6 | 6 | 3 | 9 |
| Difficult to say / it varies too much | 5 | 7 | 3 | 7 | 4 | 4 | 4 | 7 |
| I work outside London travel zones | 3 | 2 | 3 | 3 | 5 | 3 | 3 | 4 |
| I am not currently employed | 31 | 34 | 12 | 16 | 23 | 46 | 22 | 24 |

Source: The quantitative research

* Low base size – less than 50 respondents; - Nil

In Figure 2, the data for borough areas is broken out into individual outer London boroughs. Some base sizes fall below 50 interviews and overall base sizes are low, therefore results are indicative and should be treated with caution.

Based on the proportion of all local residents, including those not in work:

- Within Northern outer boroughs, commuting to Zone 1 peaks amongst residents of Waltham Forest (25%). Other outer boroughs in the North are similar to the North average.
- Within Eastern outer boroughs, commuting to Zone 1 peaks amongst those living in Redbridge (22%) and the lowest proportion of Zone 1 commuters are from Bexley (8%). Other outer boroughs in the East are similar to the East average.

- Within Southern outer boroughs, commuting to Zone 1 peaks amongst residents in Sutton (19%) and is at its lowest levels in Bromley (8%).
- For Western outer boroughs, Harrow peaks at 22%, with fewest Zone 1 commuters in Hillingdon (3%) and Richmond upon Thames (5%).
- In the quantitative survey, 15% of all residents aged 16+ who live in outer London work in Zone 1; this equates to 23% of all the working-age population living in those borough. The proportions are highest in the northern boroughs.

Figure 2. Proportion of Londoners travelling to Zone 1 from an outer borough by borough lived in



Source: The quantitative research

*low base size - less than 50

Figure 3 demonstrates that the proportion of outer London workers travelling to or within Zone 1 for work generally increases with monthly income. 36% earning £1,250 or more work in Zone 1 (peaking with 50% or more earning in excess of £2,500), whilst for those earning less than £1,250, this falls to 22%. This was also echoed in the qualitative research, where there was recognition amongst lower-income workers

that higher salaries could be achieved in Zone 1 compared to working locally in outer boroughs.

“I could probably get a job locally but would not earn as much and the reduction in travel costs would not compensate for the loss in salary.”

(Male, West)

Figure 3. Proportion of all London workers travelling to or within Zone 1 by monthly income level

| Monthly income | % of all London workers | % earning either below or above £1,250 |
|------------------------|-------------------------|--|
| Less than £199 | 26% | 22% |
| £200 - £599 | 21% | |
| £600 - £999 | 16% | |
| £1,000 - £1,249 | 23% | |
| £1,250 - £1,499 | 31% | 36% |
| £1,500 - £1,749 | 33% | |
| £1,750 - £1,999 | 36% | |
| £2,000 - £2,499 | 42% | |
| £2,500 - £2,999 | 54% | |
| £3,000 or more | 50% | |

Source: The quantitative research

The disparity by income is also evidenced by age, where the youngest workers (aged 16 to 24 years) earn less than their counterparts, with 71% of this group earning below £1,250 per month (lower than the London Living Wage).

Figure 4. Monthly income of all London workers by age

| Monthly income | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 |
|-----------------------|-------|-------|-------|-------|-------|
| Under £1,250 | 71% | 48% | 39% | 34% | 42% |
| £1,250 or more | 19% | 45% | 51% | 52% | 42% |

3.1.2 Modes of transport used to get to work and job interviews

Walking is the most prevalent mode choice amongst all London workers (45%), both on its own and in conjunction with other modes. Bus journeys to work are the second most prevalent method of transport (42%), with many made in conjunction with London Underground and National Rail services. Taking a single bus or only using the London Underground were most prevalent among all Londoners, however, for London workers who commute from outer boroughs to Zone 1, bus-only journeys are rare. Instead, combinations involving the bus, London Underground and/or National Rail are used to a greater extent, probably due to stations being situated a further distance from homes in these areas. Bus-only journeys from outer boroughs were seen by participants as impractical and may only be possible when working off-peak.

The London Underground and National Rail are used significantly more by higher earners than lower earners (38% compared to 29% and 27% compared to 21%, respectively), whereas bus usage is more prevalent among lower earners (46% compared to 41%). 'Bus only' usage is higher among those earning less than £1750 per month (10-12% compared to 5-7% for those earning more).

As seen previously, higher earners are more likely to travel from outer London boroughs to work in Zone 1 and are more likely to use the London Underground than lower earners to make the commute (61% compared to 50%).

According to the quantitative research, walking is the most prevalent transport mode amongst London commuters (45%), however this may also include walking as part of a combination of modes (many may be walking from their home to the station or stop, interchanging between services, as well as to their place of work). Some respondents in the qualitative research choose to walk a part of their journey to save money. At 42%, travelling by bus is the second most used mode to travel to work, then 35% using the London Underground, 25% using National Rail and 17% by London Overground. 22% drive to work in a car or van. Other modes of transport were used by 6% or fewer.

Figure 5. Modes of transport used to commute to workplace from home (includes stand-alone and combinations of modes)

| Transport mode | Use |
|----------------------------------|-----|
| Walk | 45% |
| Bus | 42% |
| London Underground | 35% |
| National Rail | 25% |
| Car / van | 22% |
| London Overground | 17% |
| DLR | 6% |
| Cycle (rented or private) | 5% |
| Taxi | 4% |
| Tram | 3% |
| Motorcycle / scooter | 3% |
| River bus | 2% |
| Other | 3% |

Source: The quantitative research

Figure 6 shows the modes of transport being used, either alone or in combination with others, by all Londoners commuting to work. These are based on the four most-used public transport modes (as seen in Figure 5) and can include walking as part of the journey. Taking a single bus or only using the London Underground were the most prevalent methods of public transport, followed closely by those using a combination of bus and London Underground services.

Figure 6. Combinations of modes of transport by London workers

| Transport mode | All London workers | Workers commuting from outer London to Zone 1 |
|---|--------------------|---|
| One bus ONLY | 9% | 1% |
| Two buses ONLY | 5% | 1% |
| London Underground ONLY | 9% | 9% |
| Any bus AND any London Underground | 8% | 12% |
| National Rail ONLY | 6% | 11% |
| Any bus AND any National Rail | 4% | 8% |
| London Underground AND National Rail | 3% | 10% |
| London Overground ONLY | 2% | 3% |
| Any bus AND any London Overground | 2% | 2% |
| London Underground AND London Overground | 2% | 4% |
| London Overground AND National Rail | 1% | |

Source: The quantitative research

The numbers are different for London workers who commute from outer boroughs to Zone 1: bus-only journeys are rare, while combinations involving the bus, London Underground and / or National Rail are used to a greater extent.

Figure 7 looks more closely at the main four modes of public transport used by outer borough residents. Patterns of usage do reflect the availability of particular modes in an area. For example, in the Northern outer boroughs, London Overground use is most prevalent compared to other areas, whereas National Rail use is most prevalent in Southern outer boroughs. The proportions by borough and area compare to the average mode use by all outer London borough residents.

Figure 7. Usage by Outer London Borough

| Area | Borough | London Overground | London Underground | National Rail | Bus |
|--------------|--------------------------|----------------------|-----------------------|------------------|------------|
| | Any outer borough | 15% | 42% | 25% | 39% |
| North | Barnet | 11% | 41% | 8% | 51% |
| | Brent | 23% | 39% | 7% | 38% |
| | Enfield | 31% | 45% | 32% | 42% |
| | *Haringey | 15% | 48% | 17% | 42% |
| | Waltham Forest | 23% | 36% | 23% | 51% |
| East | *Barking & Dagenham | 22% | 41% | 33% | 41% |
| | *Bexley | 12% | 19% | 42% | 26% |
| | *Havering | 14% | 35% | 35% | 33% |
| | Redbridge | 19% | 51% | 23% | 43% |
| South | Bromley | 14% | 8% | 28% | 27% |
| | Croydon | 12% | 18% | 41% | 50% |
| | Kingston-upon-Thames | 12% | 23% | 48% | 40% |
| | *Merton | 14% | 32% | 14% | 30% |
| | Sutton | 12% | 23% | 43% | 26% |
| West | Ealing | 11% | 38% | 15% | 40% |
| | Harrow | 10% | 51% | 18% | 32% |
| | *Hillingdon | 13% | 28% | 11% | 30% |
| | Hounslow | 17% | 27% | 16% | 44% |
| | *Richmond-upon-Thames | 18% | 37% | 39% | 47% |

Source: The quantitative research

*low base size - less than 50

N.B. Emboldened percentages demonstrate particularly different (higher or lower) figures compared to other areas (but not at statistically significant level due to the low base sizes involved.)

Evidence from the qualitative research suggests that people are avoiding National Rail services because of cost:

Case Study: Unemployed respondents living in Barnet

Two respondents could travel to central London using National Rail services, but find it cheaper to use alternative methods of transport (particularly the London Underground).

Case Study: West London female

This woman, whose first language is not English, said that she has to use National Rail during the London Underground strikes. Generally it is more comfortable to travel to work by National Rail, but it is more expensive. That is why she does not use it on a daily basis (plus it does not take her as close to work as the London Underground).

When looking at transport mode use by social grade in Figure 8, the London Underground and National Rail is used significantly more by ABC1s than C2Ds, whereas bus usage is higher for C2Ds.

Figure 8. Usage by social grade among all London residents to all working locations

| Social grade | London Overground | London Underground | National Rail | Bus |
|--------------|----------------------|-----------------------|---------------|-----|
| ABC1 | 18% | 38% | 27% | 41% |
| C2D | 16% | 29% | 21% | 46% |

Source: The quantitative research

It is likely that the differences by social grade are due to ABC1s being more likely to be working in Zone 1 rather than C2Ds choosing not to use London Underground and train, and opting for bus when travelling to Zone 1. The evidence to support this is:

- When looking at the zone people of different social grades work in (see commentary at Figure 1), ABC1s are more likely to work in Zone 1 compared to C2Ds. Thus if travelling to work in Zone 2 or further afield, bus usage could be more likely given shorter distances travelled and greater road congestion in Zone 1 perhaps preventing bus usage at peak periods.

- Considering workers travelling from outer zones to Zone 1, similar proportions of ABC1 and C2D use each of the main four modes of public transport for their commute (see Figure 9). The exception is a larger proportion of ABC1 workers using the London Underground (61%), which is slightly higher than C2Ds, but this is not a significant difference due to the low base size of C2Ds.
- When examining income level by mode of public transport, there are no differences in usage for the four main public transport modes.

Figure 9. Usage by social grade from outer London boroughs to Zone 1

| Social grade | London Overground | London Underground | National Rail | Bus |
|--------------|----------------------|-----------------------|---------------|-----|
| All | 20% | 59% | 42% | 41% |
| ABC1 | 21% | 61% | 43% | 42% |
| C2D* | 19% | 50% | 38% | 38% |

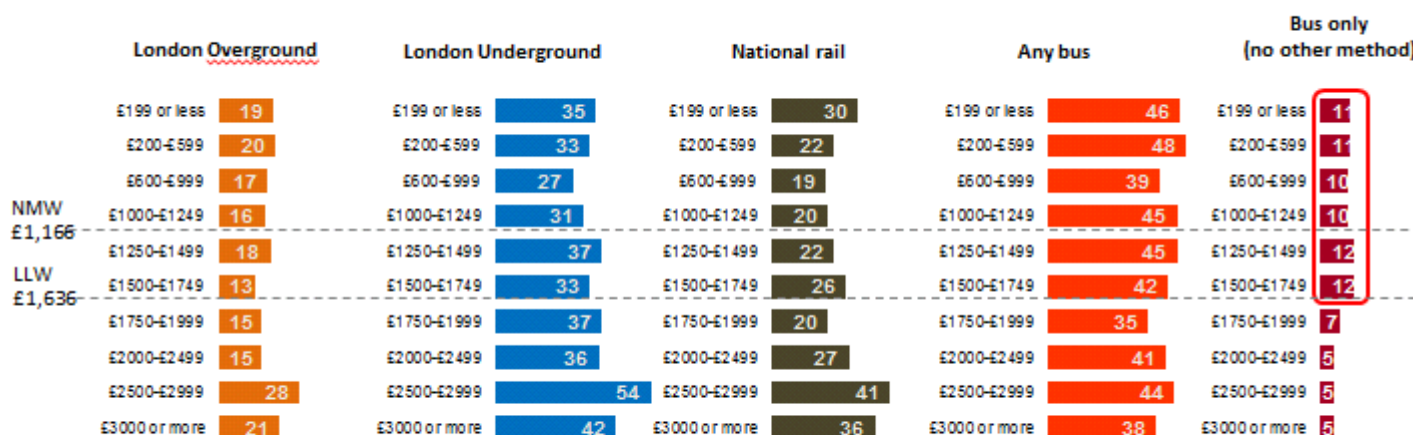
Source: The quantitative research

*low base size – fewer than 50 respondents

There is also a cost implication as 29% of bus users (compared to 18% of all commuters) say they plan their journey to work so as to spend less on travel (as seen later in Figure 18). This indicates the bus is being chosen to some extent because it saves money. However, availability and speed of commute may also impact on decision-making. This is further supported by the qualitative research evidence where the top two factors (out of seven discussed) often emerged as travel time and availability, as opposed to cost which generally fell to around fifth after comfort and number of interchanges. (Please refer also to discussion in Section 3.2.)

Figure 10 shows the usage of the four main public transport modes by income. Bus usage tends to be higher for lower earners, but not exclusively so. ‘Bus only’ usage is higher among those earning less than £1,750 per month (10-12% compared to 5-7% for those earning more). Within bus users there may be those who only use the bus and those who use the bus and other modes (for example a bus to the train station could be an added comfort for those with more disposable income).

Figure 10. Use of main public transport modes by all London workers by monthly income (%)



NMW: National Minimum Wage calculated as a per month wage based on a 40 hour week before tax
LLW: London Living Wage calculated as a per month wage based on a 40 hour week before tax

Source: The quantitative research (The dotted lines are there for ease of reading and have no other meaning.)

3.1.3 Time spent travelling to work

Lengths of journey by mode do not differ greatly by income. Despite this, lower-income earners, who are more likely to use buses (as seen in the previous section), spend more time on buses compared to higher-income earners (26% compared to 20%). This could be in part due to affordability, but lower earners are also less likely to be commuting to work in Zone 1, possibly making more local bus journeys in outer boroughs. Lower earners are also more likely to be travelling using bus only journeys.

The average journey time for all London workers is 45 minutes; this increases to 57 minutes for those commuting from an outer borough to Zone 1. Journey length for those travelling from outer London boroughs to Zone 1 is relatively similar across modes, with only slightly longer journeys for London Underground and National Rail journeys. Journey times are relatively similar by demographic group.

This finding compares with Transport for London estimates that the average total travel time per person per day is approximately 70 minutes, a figure which has not changed significantly since 2005/06.¹⁰

Accessibility to the public transport network should be taken into account when considering journey length for different income groups. Due to the relationship between property prices and distance from London Underground and National Rail stations, people on lower incomes are likely to be at a disadvantage; living further away from stations therefore having longer commutes, which, in turn, makes it more difficult for them to access better-paid work in central London.¹¹

The average length of time spent travelling on each individual mode of transport is shown in Figure 11. Average individual time spent on each mode of transport is under half an hour. The most time (25 minutes) is spent in a car or van (amongst those using this type of transport) and just under this time is spent on National Rail, London Underground, bus or cycling. 18 minutes is spent on London Overground. On average 17 minutes is spent walking part of their journey to work. Less-used transport modes such as taxis, trams, motorcycles and river boats are used for 14 minutes or less.

Figure 11. Average length of time spent travelling to work by mode of transport (use includes stand-alone use and combinations of modes)

| Transport mode | Use | Travel time (minutes) |
|----------------------------------|-----|-----------------------|
| Walk | 45% | 17 |
| Bus | 42% | 22 |
| London Underground | 35% | 23 |
| National Rail | 25% | 23 |
| Car / van | 22% | 25 |
| London Overground | 17% | 18 |
| DLR | 6% | 14 |
| Cycle (rented or private) | 5% | 21 |
| Taxi | 4% | 12 |

¹⁰ Transport for London (2015) *London Travel Demand Survey: Summary report*.

¹¹ Shawcross, V. (2014). *Tackling Poverty: One Bus Ride Away - A report by London Assembly Member Val Shawcross into Public Transport Accessibility Levels & the Effect on Deprivation*. London Assembly. Also see: Campaign for Better Transport (2012). *Transport, accessibility and social exclusion: how poor transport provision affects those on low-incomes*.

| | | |
|-----------------------------|----|----|
| Tram | 3% | 12 |
| Motorcycle / scooter | 3% | 13 |
| River bus | 2% | 12 |
| Other | 3% | - |

Source: The quantitative research

There are some slight differences in length of time spent on each mode of transport for different social grades, as shown in Figure 13, where ABC1s are spending more time on National Rail and C2Ds are spending more time on the bus. Additionally, C2Ds are more likely to be travelling by bus only (12% travel using one bus only and 6% travel using two buses). Otherwise, time spent using each mode is relatively similar.

Figure 12. Length of journey by mode by social grade (minutes)

| Social grade | London Overground | London Underground | National Rail | Bus | Walk |
|---------------------|------------------------------|-------------------------------|--------------------------|------------|-------------|
| ABC1 | 18 | 23 | 24 | 20 | 16 |
| C2D | 19 | 24 | 21 | 26 | 17 |

Source: The quantitative research

As shown in Figure 13, the length of journey amongst those travelling from outer boroughs to Zone 1 is relatively similar across modes, with only slightly longer journeys for London Underground and National Rail journeys. Since the average total journey time is 57 minutes from outer boroughs to Zone 1, the lower average journey times for each mode suggests that most journeys involve a combination of modes.

Figure 13. Length of journey from outer borough to Zone 1 by mode (minutes)

| Average total journey length | London Overground | London Underground | National Rail | Bus | Walk |
|---|------------------------------|-------------------------------|--------------------------|------------|-------------|
| 57 | 21 | 27 | 27 | 19 | 16 |

Source: The quantitative research

Similarly, when examining journey lengths on each mode of public transport by income, there are no particular differences found amongst all London commuters (Figure 14) and amongst outer London borough commuters (Figure 15).

Figure 14. Length of journey by mode by monthly income amongst all London commuters (minutes)

| | London Overground | London Underground | National rail | Bus |
|--------------|-------------------|--------------------|----------------|----------------|
| £199 or less | 14 | <£199 24 | <£199 19 | <£199 19 |
| £200-£599 | 18 | £200-£599 20 | £200-£599 18 | £200-£599 21 |
| £600-£999 | 16 | £600-£999 21 | £600-£999 19 | £600-£999 24 |
| NMW £1,166 | £1000-£1249 21 | £1000-£1249 23 | £1000-£1249 21 | £1000-£1249 26 |
| LLW £1,636 | £1250-£1499 20 | £1250-£1499 26 | £1250-£1499 25 | £1250-£1499 25 |
| | £1500-£1749 20 | £1500-£1749 21 | £1500-£1749 25 | £1500-£1749 21 |
| | £1750-£1999 25 | £1750-£1999 30 | £1750-£1999 25 | £1750-£1999 26 |
| | £2000-£2499 21 | £2000-£2499 22 | £2000-£2499 25 | £2000-£2499 20 |
| | £2500-£2999 14 | £2500-£2999 20 | £2500-£2999 31 | £2500-£2999 19 |
| | £3000 or more 18 | £3000+ 24 | £3000+ 25 | £3000+ 22 |

NMW: National Minimum Wage calculated as a per month wage based on a 40 hour week before tax
 LLW: London Living Wage calculated as a per month wage based on a 40 hour week before tax

Source: The quantitative research

Figure 15. Length of journey by mode by monthly income amongst outer borough London commuters (minutes)

| | London Overground | London Underground | National rail | Bus |
|--------------|-------------------|--------------------|----------------|----------------|
| £199 or less | 13 | <£199 27 | <£199 20 | <£199 19 |
| £200-£599 | 25 | £200-£599 22 | £200-£599 23 | £200-£599 22 |
| £600-£999 | 18 | £600-£999 19 | £600-£999 20 | £600-£999 22 |
| NMW £1,166 | £1000-£1249 22 | £1000-£1249 26 | £1000-£1249 23 | £1000-£1249 24 |
| LLW £1,636 | £1250-£1499 25 | £1250-£1499 28 | £1250-£1499 30 | £1250-£1499 24 |
| | £1500-£1749 18 | £1500-£1749 18 | £1500-£1749 28 | £1500-£1749 20 |
| | £1750-£1999 26 | £1750-£1999 30 | £1750-£1999 26 | £1750-£1999 22 |
| | £2000-£2499 23 | £2000-£2499 23 | £2000-£2499 26 | £2000-£2499 18 |
| | £2500-£2999 17 | £2500-£2999 23 | £2500-£2999 32 | £2500-£2999 21 |
| | £3000 or more 18 | £3000+ 26 | £3000+ 26 | £3000+ 22 |

NMW: National Minimum Wage calculated as a per month wage based on a 40 hour week before tax
 LLW: London Living Wage calculated as a per month wage based on a 40 hour week before tax

Source: The quantitative research

3.2 Travel choices

3.2.1 Reasons for using current commuting transport modes

This research found that 36% of all London workers did not use the quickest or best journey option for their commute. This was particularly the case for lower earners.

Cost implications are also a factor, with one in five claiming to choose their commute because of costs and one in 10 able get to work faster if they spent more on their commute. Although cost sensitivities are more apparent by different social classes, bus users (more prevalent usage amongst C2Ds) are more likely to choose transport methods due to cost.

Two thirds of commuters choose their journey because it is the quickest and best. This is less likely amongst very low earners (less than £600 per month); they are more likely to state that the time of day limits their travel choices. These limitations are possibly due to some modes being limited very early mornings or very late at night, or that bus journeys become more impractical at peak periods due to journey lengths increasing.

Although quickest and best journeys are the main reason for selecting routes to work, there is a widespread feeling of resignation about commuting. Despite the cost, there is limited availability of route choices. It is necessary to get to work or job interviews in a reasonable amount of time and, thus, there is a reluctant acceptance of the costs involved in doing so. Any attempts to lower travel costs often involve compromises with longer journey times. Compromises might involve substituting a bus journey for a walk, or the bus for trains. Opportunities to travel by bus are increased amongst those who can travel to work off-peak.

The two over-riding main reasons for selecting transport modes currently used by commuters are that they are the quickest and best available (41% for each select this as a main reason with 64% selecting either one or the other). These justifications outweigh other reasons by far. Yet this means that 36% are not choosing the quickest or best available commute to work.

This was particularly the case for those with monthly incomes of less than £600 per month (53% for those under £200 and 47% for those earning between £200 and under £599 per month) and C2D social classes (47%). This demonstrates typical lower earners are prioritising other main reasons for choosing their commute rather than being the quickest or best route.

One in five London workers claim to choose their current commute because of the costs involved, demonstrating cost has a significant impact on travel decisions for a significant number of London commuters. Furthermore, 9% of commuters state they could spend more on their current commute to get to work faster, revealing a stronger indication of cost influencing journey selection. Combined, one in four (23%) state they choose their commute because of cost OR could get to work faster if they spent more. This proportion is similar across social classes and by individual income level. However, it is higher for those aged 25 to 44 (28%), which could be an indication of the effect of higher housing costs (e.g. private rent and mortgages), or childcare expenses affecting this age group.

23% of workers commute from outer London boroughs to Zone 1. Of this group 12% state they could spend more on their current commute to get to work faster. Given there are 5.2 million outer London workers¹² this equates to 144,000 who are not taking their quickest route to work because of cost. 5% also state they could save money if their journey involved more interchanges.

Less important influences on journey selection are safety and disability. Safety was a minor issue in the qualitative research, though particularly mentioned by women (this is discussed in greater detail later in this section).

A minority of people also have their choices restricted due to availability and time of day travelled. This is further discussed in the qualitative research, where peak hours limit bus use as it can add to travel time considerably.

¹² Trust for London (2015). *London's Poverty Profile 2015*

Figure 16. Main reasons for transport modes used by all London workers travelling to all working destinations

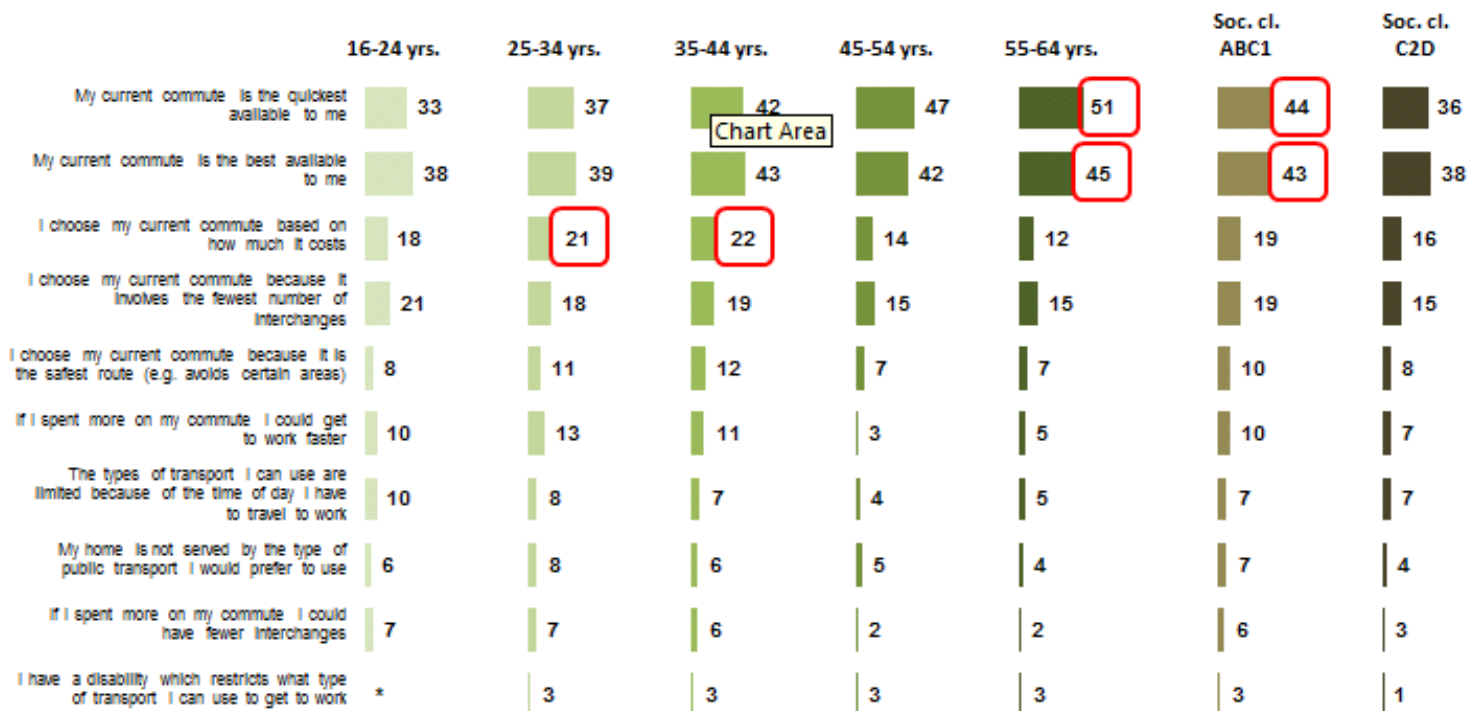
| | |
|---|-----|
| My current commute is the quickest available to me | 41% |
| My current commute is the best available to me | 41% |
| I choose my current commute based on how much it costs | 18% |
| I choose my current commute because it involves the fewest number of interchanges | 18% |
| I choose my current commute because it is the safest route (e.g. avoids certain areas) | 9% |
| If I spent more on my commute I could get to work faster | 9% |
| The types of transport I can use are limited because of the time of day I have to travel to work | 7% |
| My home is not served by the type of public transport I would prefer to use | 6% |
| If I spent more on my commute I could have fewer interchanges | 5% |
| I have a disability which restricts what type of transport I can use to get to work | 3% |

Source: The quantitative research

Figure 17 shows the main reasons for choosing the commute journey by social class and age. The key differences detected are:

- **Quickest** and **best available** choices increase by age (peaking with 55 to 64 year olds, 51% and 45% respectively) and are significantly more likely reasons for ABC1 social classes. The quickest journey also peaked for those travelling from an outer borough to Zone 1 (47%).
- **Cost sensitivity** peaks with 25 to 44s, the most likely age to be travelling to Zone 1. Differences between ABC1 and C2D social grades are slight however. Approximately one in 10 commuters claim if they spent more on the commute they could travel to work faster (with the exception of those aged 45 or over who are least likely to say this). There is a similar pattern amongst those who agree if they spent more on a commute they could have fewer interchanges.

Figure 17. Main reasons for transport modes used by age and social class (%)



Source: The quantitative research

Figure 18 examines these same reasons by the four main modes of public transport used (as seen in Figure 6), providing some insight into the drivers for using certain modes of transport:

- London Underground serves as a quick method of getting to work (46%), to a greater extent than other main public transport modes used.
- Using a bus is, to some extent, influenced by cost, where 29% choose a bus for part or all of their journey to spend less on travel.
- Similarly, the 24% who choose the London Overground may be making this choice due to cost (since London Overground fares are cheaper than London Underground and other National Rail services). The London Overground also offers some potential cost savings for the 19% of London Overground commuters who think that they could get to work faster if they spent more. Although not proven in quantitative research, this could mean some are avoiding Zone 1

through using the London Overground to save money. In the qualitative research there was also some evidence of this, as shown in the case study below:

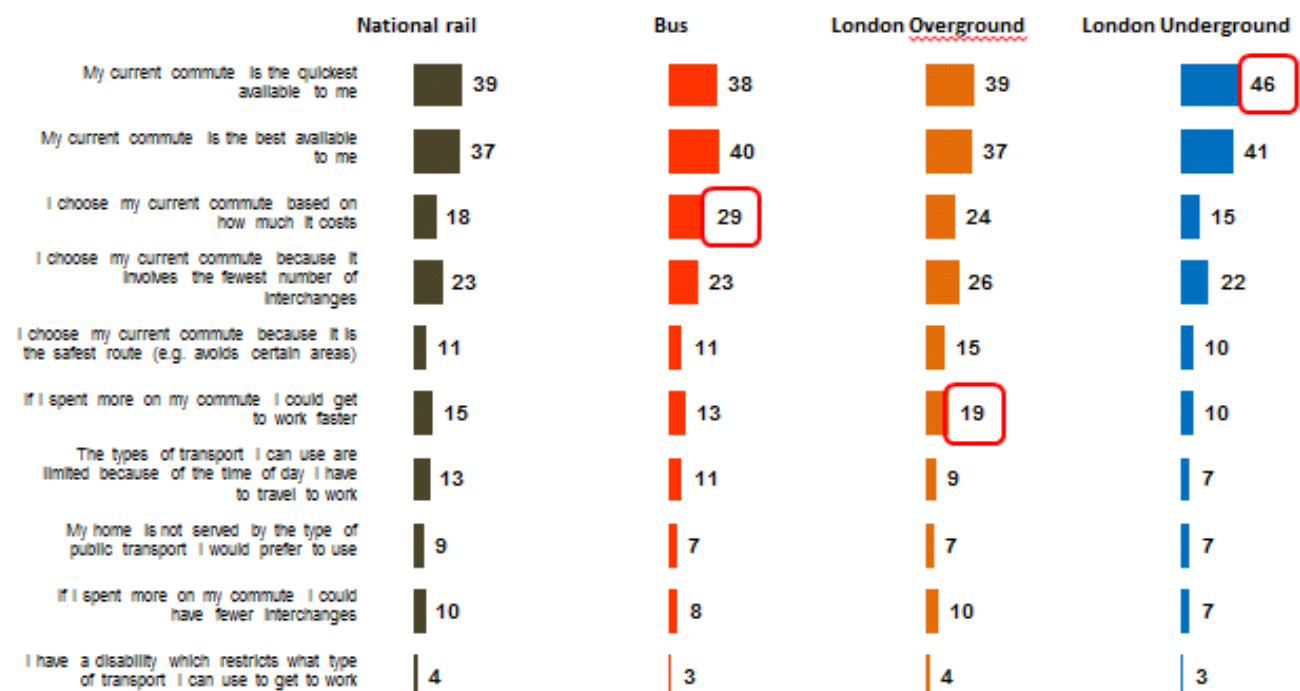
Case Study: West London female, unemployed and looking for roles across London

This woman would consider avoiding Zone 1 by getting the London Overground across the city if she found a job in East London. She understood that this route would be cheaper and so would be a good option if she found a job she would like, albeit one that didn't pay as much.

Generally, she would be happy commuting up to 2.5 hours if it was the perfect job for her (2.5 days a week due to a disability). However, if the job paid enough to afford it, she would prefer to take a more direct route to save time.

“When I was working full-time and I was earning more, I was working hard, so travelling more cheaply wasn't an issue – you just want to get home. If the job is less taxing, then you don't worry so much. It's nice to go the path of least resistance.”

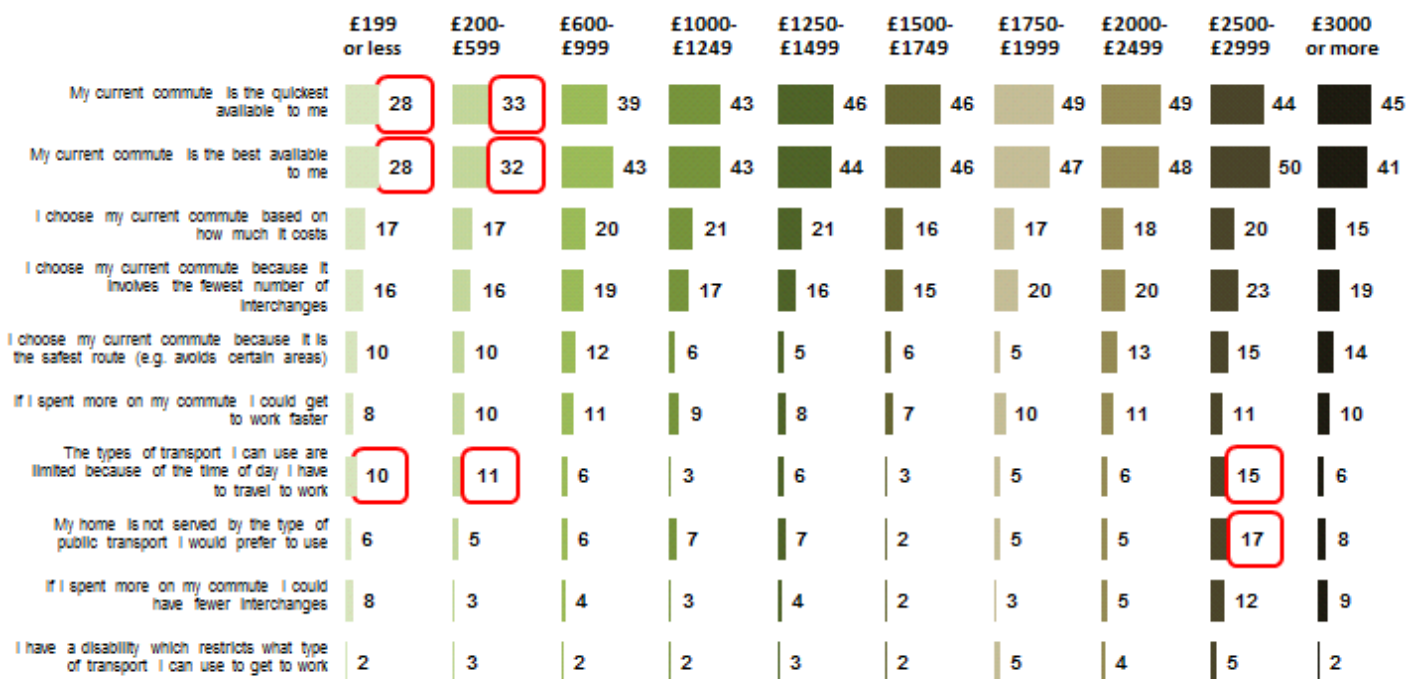
Figure 18. Main reasons for transport modes used by modes used (%)



Source: The quantitative research

As shown in Figure 19, there are some minor differences by monthly income in the main reason for choosing transport modes. Lower earners (less than £600 per month) are less likely to choose their commute due to it being the quickest or best available journey, but are more inclined to state that the time of day limits their choice of travel. This is possibly due to some modes being limited very early mornings or very late at night, or that bus journeys are more impractical at peak periods due to journey lengths increasing by congestion.

Figure 19. Main reasons for transport modes used by monthly income (%)



Source: The quantitative research

For qualitative research participants, **travel time** is a critical element in choice of travel mode and route. Most people claim to choose the quickest route available. There were only a few deviations from this: for marginally more time spent travelling, a greater level of comfort could be achieved. For example, some could use a bus, which would not add to their journey significantly (particularly amongst those travelling off-peak), and which provided more comfort. There were a few mentions of changing to a different London Underground train or line (where possible) to travel in more modern carriages. Some London Underground lines were cited as more desirable since they provide air conditioning and WiFi.

“I sometimes get off the train I am on, if it gets too busy, and wait for the next or so, just to get a bit more comfort.” (Female, non-English, West)

For jobseekers, time spent travelling to a potential workplace played some part in decision making. Jobseekers were largely open-minded about where they would look for work, often willing to spend up to an hour travelling to a potential workplace. However, in reality the main factors involved in accepting a job where ‘excessive’ travel time was required were pay level and whether it was a job they really wanted to do. If the job paid a bit or a lot better than employment nearer home, it was worth the extra effort to get there. Equally if it was a job they really wanted to do, and therefore provided greater quality of life, it was worth the compromise of additional travel time.

For qualitative research participants, **availability** was often not considered since journey choices are more limited in outer London boroughs. When living in Zones 4-6, the choice of route is often limited, particularly in peak travel periods, to what is available in the area (for example only London Underground, only National Rail or London Overground) The only ‘choices’ available might be whether or not to take a bus to the station or walk.

Although **travel cost** was less likely to influence the choice of route, a strong feeling of resignation about travel to work and travel costs emerged. There was an overwhelming feeling that there is no control over travel cost and that people have no real choice but to pay the fare. Reducing travel cost means compromising with longer travel time and this is largely perceived as impractical, particularly in peak hours. Compromised travel often referred to travelling by bus (where it is possible to travel to Zone 1 by bus), but may involve taking more than one bus route and impacts hugely on travel time given congested roads, more likely in peak hours. One example given was a 3-4 hour journey which was completely impractical.

“I feel sort of trapped, I don’t have any other choices and I have to take the Tube at set times to get to work.”
(London Underground commuter, female, North)

“If I get the bus instead of the Tube, I have to get up at 4 (am) and go to bed at 9 (pm).” (London Underground commuter, male, non-English, West)

Jobseekers also shared these views, but the cost of travel was felt more acutely (probably due to lower levels of disposable income), with some compromising on other areas, such as food, to pay for transport. There was also one person who said they were concerned about paying for travel when starting work (Note: this respondent did not hold a Jobcentre Plus Travel Discount card).

“I’m worried that I might not have enough money to put on my Oyster when I start working. I’d have to borrow it, but I want to try not to put myself into such a situation.” (Unemployed female, North)

Bus users were largely content with their journey compared to the other main modes of public transport. The bus is thought to be more affordable and, even where alternative routes are available for some, it is preferred even if it takes marginally longer. This was also shown in the quantitative research, where bus users were most likely to choose their commute based on its cost and, to some extent, most likely to claim that the bus is the best available to them (see Figure 19).

Most bus users in the qualitative research regarded a bus journey as more comfortable; there is less crowding, it feels more spacious and more airy compared to alternatives, such as the London Underground. It is therefore more peaceful and provides an opportunity to read or relax.

“There’s something about travelling on the bus, sitting down and the warmth that makes me want to curl up and go to sleep like this. My friends always take the mickey out of me, but it’s relaxing.” (Bus commuter, male, North)

Case Study: West London male, commutes by bus off-peak as a store worker

One exception to the mainstream frustration about travelling to work using public transport was a bus user who can travel off-peak because of his working hours. He had mainly positive things to say about commuting, comparing driving to travelling by bus:

- It saves him time as he is not sitting in any rush hour traffic or looking for parking

- He can have 'a snooze' when he feels like it, which he cannot do behind the wheel
- Has time to read while commuting and enjoys it.

Despite satisfaction amongst those who use the bus, many of those who said they 'could not' use it as part of their commute viewed it as being less reliable, as buses can get delayed with heavy traffic.

"For job interviews, I have to jump on the Tube because I can't be late."

(Unemployed, male, East)

"The bus would triple the length of time it takes to get to work; is it worth time?"

You just want to get home as quickly as possible at the end of the day."

(Male, North)

It was noted that the availability of apps and digital 'Countdown' displays at bus stops were useful, as it helps re-plan a journey if required.

There was a clear and obvious preference for **off-peak** travel. Discussions in many focus groups were dominated by the unpleasant travel conditions when travelling, particularly during peak hours and in reference to the London Underground. Respondents mentioned crowded journeys, the unpleasant feeling of being so close to other people and the smell of other people. This made the journey more stressful and frustrating, evidenced particularly amongst male commuters.

However, for many commuters, opportunities to travel off-peak are limited. Jobseekers were more flexible to travel off-peak and the lower fares also meant off peak travel was more attractive. Many commuters had inflexible working hours with many working a typical 9-5 day. There were some exceptions to this:

Case Study: Builder living in North London

This self-employed builder has worked on different sites across Zone 1 for a long time. Typical of trade workers, he starts his day early and ends earlier in the afternoon.

Although he works with materials and tools, he transports these to the site he is working on at weekends by van when the roads are less busy and the congestion charge does not apply. This allows him to travel by public transport to the site during the week. He can travel by bus as he is travelling slightly before peak hours at the beginning and end of the day, before traffic builds and slows the journey.

His decision to travel this way is partly convenience driven (to cut down on travel time and avoid the need to find parking spaces each day) but he pointed out the high costs associated with driving (petrol, parking and congestion charge). This would also affect the cost he has to charge his clients

Other examples of travelling off-peak are:

Case Study: Waiter living in South London

As this waiter works shifts, he is often able to travel off-peak for a cheaper fare on the London Underground. As such, he tends to calculate each week whether it is worth paying for a travel card, or whether to just use Pay As You Go on his Oyster card, as often, if he is travelling off-peak, it is cheaper to do it this way then to pay the cost for a travel card.

He does feel that this is a bit over-complicated, and it would be easier if Transport for London could calculate this for him from his Oyster card usage for the week. [Note: It seems that he had not been made aware of the reduction in the daily cap for Pay As You Go Oyster and contactless card users to one fifth of the cost of a seven-day Travelcard to benefit part-time workers, introduced in November 2014.]

Sometimes he also gets up early to get the bus to work instead because it is cheaper – this takes a longer time, but gives him time to prepare for the day ahead while on his journey

Case study: Warehouse worker living in East London

This respondent also works shifts and is sometimes able to travel off-peak to save money. He has two primary school-age children and his wife works part-time as a lunchtime assistant at the local primary school. The household budget is tight where compromises have been made by doing away with a landline phone and turning the heating thermostat down to 18.5C now that the children are older.

He lives in housing association accommodation near Chadwell Heath in East London. His commute to work used to involve a 30-minute walk or a bus journey to Newbury Park London Underground station, from where he would take the Central Line and interchange in Zone 1 to get to work in Euston. Goodmayes TfL Rail station is nearer to his home, but he has only started using this station more recently since the cost to travel from Goodmayes was previously more expensive than from Newbury Park. Walking to Newbury Park “wasn’t something I wanted to do after a day of work” (he has to manually lift heavy boxes of drink cans) “but it saved me around £10 a week, which is £40 a month, which is a lot of money”. Because of Transport for London’s recent takeover of the Liverpool Street to Shenfield rail line from Abellio Greater Anglia, it now costs the same to travel to Zone 1 from Goodmayes and Newbury Park (both in Zone 4), so he now uses this route as a result of the reduction in his travel cost.

By travelling off-peak he can save as much as £50 a month, which is the equivalent of a big supermarket shop. To make these savings more often, he usually lets his manager know that he will be in late, and his manager makes an informal arrangement for him to start later and for him to make up the time at the end of the day. His manager is aware that he is doing this to save money on travel.

Generally, **safety** was a minor concern in both the quantitative and the qualitative research, however some comments were made in the qualitative research, particularly by women (although some observations were made by men sympathetic to female travellers). Safety concerns were mainly raised in relation to bus and London Underground travel:

- A hairdresser carried her valuables in a waist belt concealed under her clothing

- There were some observations about bus travellers tending to be less salubrious which, in turn, made bus journeys less pleasant

“There’s a different class of people on the bus...they’re more likely to kick off.”

(Female, West)

“Night buses can be filled with crazy people and you can feel a bit unsafe.”

(Male, North)

“Sometimes I feel unsafe, just when it’s me and one other person [male] on the upper deck of the bus – I would immediately go down... But the Tube can also make me feel unsafe if it’s just me with a single male in the same carriage. I usually look out on who else is in the same carriage and around me on the bus. Also, what I find annoying is when men sit with their legs wide apart or push their arm onto the arm rest – they behave as if they travel in their own car.” (Female, West)

3.3 Transport costs

3.3.1 Monthly travel expenditure

Average monthly travel costs for all London residents are just under £100, which equates to 7.3% of individual incomes or 4.9% of household net income. The proportion of travel to individual income peaks for typical lower-income earners: 16 to 24 year olds (12.7%) and C2Ds (9.2%). Those with longer commutes also have higher travel cost to income ratios (commuters from outer London boroughs to Zone 1 – 8.8%).

To put transport costs and household expenditure into context, *A Minimum Income Standard for London*¹³ report states that:

The overall cost of a household budget ranges from 18% to 47% more in London than outside, varying by household type. This extra cost comes mainly from housing and childcare, but other costs such as transport can add to the minimum cost of living in

¹³ Trust for London (2015) *A Minimum Income Standard for London*, May 2015.

London. People in London working on the National Minimum Wage also fall short with disposable incomes between half and three-quarters of what they need¹⁴.

Travel expenditure peaks for males, 25 to 44s (who are most likely travelling to Zone 1), parents, ABC1 social grades and those travelling from outer boroughs to Zone 1.

The proportion of travel expenditure to individual income peaks for traditional lower earners: 16 to 24 year olds (12.7%), C2Ds (9.2%), as well as outer borough commuters to Zone 1 (8.8%).

When comparing transport expenditure between social grades, ABC1s spend 6.8% of the individual income on transport, compared to 9.2% for C2Ds. Similarly, ABC1s spend 4.6% of their household income compared to 5.8% for C2Ds.

Income ratios are based on total income not on disposable income and so do not take into account the greater costs faced by parents paying for childcare or those with a number of dependents. This is also evidenced by the report *A Minimum Income Standard for London*, where families living in London are the most likely to be below a minimum income standard (43%), compared to working age households without children (26%).

¹⁴ Trust for London (2015) *A Minimum Income Standard for London*, May 2015.

Figure 20. Average monthly commute transport expenditure

| | | Average monthly cost | % of individual income | % of household income |
|--|--------|----------------------------|------------------------------|-----------------------------|
| | All | £ 97.64 | 7.3% | 4.9% |
| Sex | Male | £ 109.36 | 6.9% | 5.0% |
| | Female | £ 85.68 | 8.0% | 4.8% |
| Age | 16-24 | £ 85.67 | 12.7% | 6.0% |
| | 25-34 | £ 112.49 | 8.5% | 5.6% |
| | 35-44 | £ 122.35 | 7.7% | 5.4% |
| | 45-54 | £ 81.18 | 5.4% | 3.9% |
| | 55-64 | £ 67.66 | 5.4% | 3.6% |
| Parents | Yes | £ 123.28 | 7.9% | 5.5% |
| | No | £ 83.74 | 6.9% | 4.5% |
| Social Grade | ABC1 | £ 105.81 | 6.8% | 4.6% |
| | C2D | £ 84.00 | 9.2% | 5.8% |
| Outer borough resident travelling to Zone 1 | All | £ 156.33 | 8.8% | 6.0% |

Source: The quantitative research

Commuting travel spend by area shows some variations in expenditure within quantitative research. The base size for each area is relatively low, so differences could be sample biases, but these areas show correlations with some other characteristics as shown in the bullet points below, relating to outer London boroughs (it is not possible to show modes of transport due to sample size restrictions):

- Higher expenditures:
 - Waltham Forest residents have the highest monthly expenditure on travel and are the most likely to be Zone 1 commuters (25% - see Section 3.1.1)
 - Croydon residents have the second highest expenditure on travel and spend the highest proportion of individual income on transport (10%) even though they are less likely to travel to Zone 1 (13% - see Figure 3). Note: residents in the sample have a C2D and female bias

- Barking and Dagenham residents have the third highest expenditure on travel, although similarly, commuting to Zone 1 is less common (13% - see Section 3.1.1). They are likely to have a longer than average overall commute (53 minutes) and there are a greater proportion of C2Ds in the borough. This borough also had a low base size.
- Lower costs (both these boroughs had low base sizes)
 - Richmond-upon-Thames residents have the lowest monthly travel expenditure and spend the lowest proportion of both individual and household income (4% and 3% respectively). This may correlate with the 5% of residents who travel to Zone 1 (see Figure 3)
 - Haringey residents have the second lowest monthly travel expenditure and spend the second lowest proportion of individual income on travel (5%). 22% of Haringey residents commute to work in Zone 1.

There are a number of factors that may explain these borough-level differences. One factor may be the proportion of employed borough residents working mainly at or from home, therefore having lower monthly travel costs. For the boroughs with higher travel costs per month, 3% of Waltham Forest workers (ages 16-74) work at or from home, while 5% in Croydon and 2% in Barking and Dagenham work at or from home. This compares to boroughs with lower monthly travel costs, where 9% of Richmond-upon-Thames and 6% of Haringey residents work at or from home. The London average of people working at or from home is 5%.¹⁵

Comparing the proportions of people who work full-time versus part-time does not reveal any significant difference between the five boroughs highlighted in the previous paragraph.

¹⁵ Office for National Statistics (2011) *Neighbourhood Statistics: Method of Travel to Work, 2011*.

Figure 21. Average monthly commute transport expenditure by borough lived in

| Area | Borough | Average monthly cost | % of individual income | % of household income |
|-------|-----------------------|----------------------|------------------------|-----------------------|
| North | Barnet | £ 93.02 | 7% | 4% |
| | Brent | £ 95.12 | 7% | 4% |
| | Enfield | £ 102.67 | 8% | 5% |
| | *Haringey | £ 72.68 | 5% | 4% |
| | Waltham Forest | £ 118.11 | 7% | 5% |
| East | *Barking & Dagenham | £ 110.23 | 8% | 6% |
| | *Bexley | £ 98.95 | 9% | 6% |
| | *Havering | £ 96.97 | 8% | 5% |
| | Redbridge | £ 101.16 | 8% | 5% |
| South | Bromley | £ 83.47 | 5% | 4% |
| | Croydon | £ 110.78 | 10% | 6% |
| | Kingston-upon-Thames | £ 87.74 | 7% | 4% |
| | *Merton | £ 78.74 | 7% | 4% |
| | Sutton | £ 87.35 | 7% | 4% |
| West | Ealing | £ 80.92 | 6% | 4% |
| | Harrow | £ 90.45 | 7% | 4% |
| | *Hillingdon | £ 96.17 | 7% | 4% |
| | Hounslow | £ 75.85 | 7% | 5% |
| | *Richmond-upon-Thames | £ 59.88 | 4% | 3% |

Source: The quantitative research

*low base size – fewer than 50

3.3.2 Number of hours worked to pay for daily transport costs

The average London worker needs to work for 44 minutes to pay for their daily commute. This increases sharply for people earning less than £600 per month (54 minutes for those earning £200 to £599 and 1 hour 56 minutes for those earning less than £200.) There was a widespread view that travel costs are high, but people are resigned to paying these costs as there is little choice other than finding potentially lower paying work locally.

Using the quantitative research, based on pay, the number of hours worked, and the cost of travel, a calculation can be made of the number of hours needed to work to pay for daily travel. Overall, London residents need to work for 44 minutes per day to pay for their daily travel to work. This level peaks with those earning less than £200 per month (1 hour 56 minutes) and those earning £200 to under £600 per month (54 minutes). Once earning £600 or more per month, the amount of time needed to work to pay for daily travel levels off at around 20 minutes. One quarter of workers are earning less than £600 a month and, therefore, working longer to pay for daily travel.

Figure 22. Number of minutes needed to work per day to pay for daily travel

| Monthly income | % of workers in this pay category | Minutes |
|------------------------|-----------------------------------|------------|
| All | | 44 |
| Less than £199 | 13 | 116 |
| £200 - £599 | 12 | 54 |
| £600 - £999 | 9 | 23 |
| £1,000 - £1,249 | 9 | 22 |
| £1,250 - £1,499 | 8 | 24 |
| £1,500 - £1,749 | 7 | 21 |
| £1,750 - £1,999 | 7 | 19 |
| £2,000 - £2,499 | 9 | 17 |
| £2,500 - £2,999 | 6 | 20 |
| £3,000 or more | 9 | 13 |

Source: The quantitative research

3.3.3 Impact of commuting costs on other household expenditure

Some people have to cut other spending to pay for travel to work, where 1 in 5 are in high agreement that they have to compromise in other household expenditure areas (equally divided amongst utilities, looking for special offers when food shopping, clothes shopping, socialising and non-essential purchases) because there is little scope for reducing travel costs. Higher-earning workers claim to be affected to a greater extent, perhaps reflecting the fact that they are likely to be more financially literate about budgeting or, conversely, that lower earners are already accustomed to balancing smaller household budgets and possibly have no more compromises to make. Travel costs usually rank second or third to rent, followed by utility bills, council tax or food.

Research participants were asked how the cost of travel to work impacts on other areas of household expenditure. Results from the quantitative research show that compromises are being made; all elements measured are scoring above 1 on a scale of 1 to 5 (where 5 is high agreement and 1 is low agreement). However, there is little difference between the potential impacts travel costs can have by social class, gender or area. As shown in Figure 23, there is a fairly similar level of agreement on attitudes to cost, with most agreeing close to the mid-point (i.e. 2.5) that utilities, food shopping, limiting clothes shopping, socialising and purchasing non-essentials were impacted by the cost of their commute to work. No single area of expenditure stands out more as being reduced in order to pay for travel. This resonates with the feeling of resignation towards the cost of travel to work (as discussed in Section 3.2.1), where the cost is what it is, with little choice to avoid it.

Figure 23. Attitudes to cost among all London residents – average score out of 5 (where 5 is high agreement and 1 is low agreement)

| Attitude to cost | Mean | 1 | 2 | 3 | 4 | 5 | N/A |
|--|------|-----|-----|-----|-----|-----|-----|
| As a direct result of what I have to pay for commuting to work I will regularly review the amount I spend on utilities (e.g. gas, electricity etc.) and will switch providers if it is worthwhile | 2.71 | 16% | 10% | 15% | 23% | 16% | 19% |

| Attitude to cost | Mean | 1 | 2 | 3 | 4 | 5 | N/A |
|---|------|-----|-----|-----|-----|-----|-----|
| As a direct result of what I have to pay for commuting to work, I deliberately look out for special offers as much as I can when doing my food shopping | 2.69 | 13% | 15% | 21% | 15% | 20% | 15% |
| As a direct result of what I have to pay for commuting to work, I deliberately limit the type or amount of clothes shopping that I do | 2.68 | 13% | 16% | 22% | 15% | 20% | 15% |
| As a direct result of what I have to pay for commuting to work, I will limit what I spend on socialising with friends or family | 2.67 | 12% | 18% | 20% | 15% | 19% | 15% |
| As a direct result of what I have to pay for commuting to work, I have to carefully consider any non-essential purchases | 2.60 | 15% | 17% | 21% | 14% | 18% | 14% |
| As a direct result of what I have to pay for commuting to work, I have to compromise on the type / quality of childcare that I use | 2.28 | 7% | 12% | 19% | 12% | 19% | 32% |

Source: The quantitative research

Figure 24 shows these attitudes towards the cost of commuting by income level. Consistently, higher earners are more likely to claim they watch expenditure in other areas to a greater extent than lower earners, perhaps emphasising that higher earners are likely to be more financially literate about budgeting or, conversely, that lower earners are already accustomed to balancing smaller household budgets and possibly have no more compromises to make.

Figure 24. *Attitudes to cost – average score out of 5 where 5 is high agreement and 1 is low agreement by monthly income*

| Attitude to cost | Less than £199 | £200-£599 | £600-£999 | £1000 - £1249 | £1250 - £1499 | £1500 - £1749 | £1750 - £1999 | £2000 - £2499 | £2500 - £2999 | £3000 or more |
|---|----------------|-----------|-----------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| As a direct result of what I have to pay for commuting to work I will regularly review the amount I spend on utilities (e.g. gas, electricity etc.) and will switch providers if it is worthwhile | 2.40 | 2.67 | 2.59 | 2.65 | 2.74 | 2.51 | 2.78 | 3.06 | 3.25 | 3.17 |
| As a direct result of what I have to pay for commuting to work, I deliberately look out for special offers as much as I can when doing my food shopping | 2.33 | 2.68 | 2.65 | 2.51 | 2.84 | 2.53 | 2.65 | 2.85 | 3.20 | 3.26 |
| As a direct result of what I have to pay for commuting to work, I deliberately limit the type or amount of clothes shopping that I do | 2.44 | 2.67 | 2.66 | 2.51 | 2.69 | 2.47 | 2.67 | 2.84 | 3.18 | 3.19 |
| As a direct result of what I have to pay for commuting to work, I will limit what I spend on socialising with friends or family | 2.46 | 2.63 | 2.60 | 2.47 | 2.69 | 2.51 | 2.62 | 2.83 | 3.09 | 3.28 |
| As a direct result of what I have to pay for commuting to work, I have to carefully consider any non-essential purchases | 2.42 | 2.59 | 2.55 | 2.41 | 2.52 | 2.37 | 2.55 | 2.87 | 3.10 | 3.18 |

| Attitude to cost | Less than £199 | £200-£599 | £600-£999 | £1000 - £1249 | £1250 - £1499 | £1500 - £1749 | £1750 - £1999 | £2000 - £2499 | £2500 - £2999 | £3000 or more |
|--|----------------|-----------|-----------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| As a direct result of what I have to pay for commuting to work, I have to compromise on the type/quality of childcare that I use | 2.32 | 2.38 | 2.06 | 2.26 | 2.12 | 1.79 | 2.17 | 2.54 | 2.80 | 2.80 |

Source: The quantitative research

In the qualitative research among outer London residents commuting to Zone 1, travel costs were usually ranked as second or third most expensive outgoings or, at the very least, are mid-range (of a list of 12 common household costs). Travel costs were usually second or third to rent, followed by utility bills, council tax or food. The price of both housing and childcare is much higher in London¹⁶, therefore it came as no surprise that rent was almost consistently the highest outgoing expenditure (and for parents with young children, childcare was noted as a sizable expense). Travel cost ranking appeared to be dependent on how much was spent on other items. For example, for some respondents, food and quality of food was very important and people were prepared to spend more in this area, but equally could be an area of compromise, with food mentioned particularly by some unemployed people.

In the qualitative research among outer London residents commuting to Zone 1, compromises on spending in other areas were not an exclusive issue for travel costs. Rather, respondents talked more widely about making compromises in general where many essential household expenditures were increasing (utility bills in particular). Compromises discussed were usually cutting down on the 'non-essentials' such as savings, clothing, socialising.

"It can be a struggle to pay bills as it is, then if you have to pay for travel as well it's too much" (Female, South)

¹⁶ Trust for London (2015) *A minimum Income Standard for London*, May 2015.

"I feel like I'm throwing food away (i.e. not buying food) to be able to travel. Transport in London can be very expensive and, if I cut down how much I spend on food, I can get around more."

(Unemployed female, North)

Case Study: North London single parent seeking care work

This woman wants to work in a care home; she has experience in this area. She is a single parent of a pre-school child. She is happy to look for full-time work when her daughter starts nursery full-time next year. Her daughter has a free part-time nursery place currently, but this is quite restrictive when looking for work.

Being able to use public transport means she can look for work outside her local area. She's prepared to spend up to £10 a day on travel to a potential workplace. Also, she would be prepared to walk to work for up to half an hour to save money (she has walked to work at this sort of distance in the past). She spends £60 a month on travel and tends to travel by bus as it is cheaper; trains are more expensive.

She compromises on her food bill so that she can travel. Sometimes she can't get to interviews as she doesn't have the money to get there. She is aware of the Jobcentre Plus Travel Discount, but has not got around to asking about it at the Jobcentre yet.

Case Study: West London unemployed male

This person previously worked in an office, but the company relocated to Scotland and he didn't want to move so far away. He tends to get around on buses as they are cheaper and he gets a cheaper pass through the Jobcentre but, even with this, he still finds travel expensive. He used to get the London Underground to work every day and expects to do so again when he gets a job in the future. Currently, he feels that he'll have to compromise on his food shopping and try to find cheaper bills for his mobile and internet when he starts working to be able to afford the transport costs. For now, the bus makes things cheaper, but it is not always the best way if he needs to be somewhere on time.

"If you haven't got enough money you might have to jump on the bus, and the bus is the longer way, it might make you late..."

Case Study: North London unemployed female

This woman previously worked in central London, but now has a daughter and so has not been able to work as the cost of childcare would be too prohibitive. Now that her daughter is three, she gets 15 hours of free childcare a week, and so is looking for part-time work around this. She is, therefore, limited in what she can look for unless it is well paid; it would need to be local or it wouldn't be worth paying the extra childcare costs for the time she would be commuting. She feels that, once she starts working full-time (when her daughter starts at school), travel will be on a par with the childcare costs she will have to pay. She is constrained by childcare available hours, so any time spent travelling to get to the childcare provider is time that she's not spending working. Therefore, taking a local job (rather than working further afield) could mean she can work more hours and spend less on travel, so the two factors combined means she is better off.

"That hour on the train, I could be doing an hour's work and getting paid for it. You might get paid more in the City, but once you travel you have to work less hours, and you pay for the travel, it doesn't really make sense."

3.3.4 Perceptions of travel costs

Travel costs were perceived among outer London residents as very expensive and poor value for money due to the unpleasantness associated with peak hour congestion. However, for the time being, travel costs are not enough of a deterrent to change travel habits or place of residence to be closer to work, further highlighting a general sense of resignation. Many are concerned about the rising cost of travel in the future and some may consider finding work more locally as a result of rising fares.

The qualitative research among outer London residents showed that, almost without exception, travel costs were perceived as very expensive. This view coloured much of the discussion, particularly where the high costs do not marry with the service being provided, particularly for peak hours. The quality of provision is perceived as poor value for money due to the unpleasantness of the journey associated with peak hour congestion.

Due to the widespread feeling of resignation about travel costs, the cost of travel is not enough to change habits in the immediate future. Respondents largely discounted the idea of moving home for the sake of being nearer their place of work given they either are settled with family and friends, like the area they live in, or it is where they have been provided with social housing, so realistically they do not have a choice. Dislike for commuting was not strong enough to change this.

In the longer term, when asked about concerns in the future, travel cost was one of the widest held concerns:

“A Chinese lantern goes up in the air really slowly, you hardly notice it moving. Then you glance away and look again and it’s right up there. That’s what travel costs are like; they add a bit here and there. You don’t notice it at first on your Oyster card, then you wonder where your money has gone.” (Male, North)

For some, rising travel costs in the future might mean a greater sense of resignation at having to put up with even higher expenditure on travel. For some, the alternative is lower-paid local work, with more females saying they might consider this alternative compared to males. Working more locally might offer a better work/life balance, with extra time available for family and leisure time generally.

“I’d feel worse off if I worked locally – it benefits me to commute to a central job...I’ve got more chance of earning more money.” (Female, South)

“I’d like to work close to home, but central jobs pay more.” (Male, West)

3.4 Paying for travel

3.4.1 Methods used

The majority of commuters in the qualitative research use Oyster PAYG or contactless cards to pay for travel. Weekly, monthly or annual season tickets were used rarely as they were not perceived to be affordable or worth the cost.

In the qualitative research, the main method of payment for travel to work in Zone 1 was via a PAYG Oyster or contactless card. These were used as they were perceived as the most cost effective method of payment and they are convenient and easy to use.

The alternative to PAYG Oyster or contactless payment was a weekly, monthly or annual season ticket, but they were often viewed as:

- Not worth it in that there was no cost saving in doing so; either part-time workers would only use these for part of the week or full-time workers would not use it at the weekends

“If I go out at the weekend, it feels like I’m winning.” (Male, East)

- Not affordable: this was particularly the view on the annual season ticket. The only annual season ticket holders were those in receipt of a season ticket loan from their employer.

Bearing in mind the prevalent use of PAYG Oyster and contactless cards, daily transport used is charged for cumulatively (unless daily caps are reached).

Therefore, the decision to add an extra method of ‘optional’ public transport to the journey, such as a bus to the train station, may be affected by the extra cost. This would not be the case with a weekly or daily travel pass.

3.4.2 Jobcentre Plus Travel Discount

For jobseekers in receipt of benefits, a travel discount can be applied for via the Jobcentre, offering half-price travel on public transport for a period of three months.

Amongst jobseekers living in outer London, there appeared to be inconsistent information being provided about this discount; some were in receipt of it, whereas others were vaguely aware of it or had not heard of it at all. Without exception, it was viewed positively as something to help with getting to interviews, helping in the first few months of employment and offering a social lifeline when unemployed.

Evidence from the qualitative research among outer London residents showed inconsistencies in the information being given to jobseekers about the Jobcentre Plus Travel Discount. There was a mix of those who had heard of the discount before the research interview and those who had not. Amongst those who had not heard about it, there was interest in receiving financial help with travel both for job interviews and for social purposes. For some, there was surprise at the level of discount being 50% and that, in certain cases, the discount can be extended to cover the first few months of commuting to a new job. This made it even more attractive.

“I need to get onto that, definitely! It’s excellent; I didn’t know it was that much and I thought I was ineligible. It means there is a greater range for me to travel and, when you start a new job, you don’t get paid for a while so the first three months thing is really good.” (Unemployed, male, North)

Amongst people who had heard of the travel discount, this was either by word of mouth from other jobseekers, but also via the Jobcentre.

The inconsistency in awareness about the Jobcentre Plus Travel Discount demonstrates a continued problem and echoes research carried out by London TravelWatch in 2011¹⁷. This research found significant disparities across the capital in the number of people taking advantage of the Jobcentre Plus Travel Discount. The varying levels of take-up of the discount suggested that some Jobcentres were promoting it while others were not.

Some participants found it difficult to get the discount applied to their Oyster Card following the closure of London Underground ticket offices. This needs to be addressed by better publicity and explanation as to how the discount can be added.

Case Study: Unemployed female in receipt of Employment and Support Allowance.

This woman is in receipt of the Jobcentre Plus Travel Discount and has used public transport a lot as a result of having it. She had been made aware of it so that she

¹⁷ London TravelWatch (2011). Jobseekers Losing Out On Transport Discounts. [Online]

could attend a training session hosted by the Jobcentre, which was in a location where she would need to use public transport.

She appreciates the 50% discount as it means she can get to appointments at employment agencies and job interviews, as well as having social contact (this was important to her to avoid feeling isolated).

In her experience, she finds it difficult to renew her eligibility as her discount for the London Underground needs to be replaced with new photos every three months. Aside from being seen as expensive to replace, since her local Jobcentre does not issue them, it has to be sent off to another office, meaning she misses out on two days of discount. The discount also needs linking to her Oyster card. She sometimes finds it problematic trying to find a station with a manned office to do this for her, causing her further expense.

3.5 Potential Improvements

The key potential improvements were travel cost discounts for people with low incomes and flexible approaches to accommodate working from home or off-peak travel and also for those working less than five days per week.

In the qualitative research among residents of outer London, despite discussions being dominated by complaints about travel and travel costs (with the London Underground in particular), the underlying theme across all interviews was that it works relatively well and it is good that it is there.

“At the end of the day the Tube makes London, but it needs a bit of improvement here and there.”

The respondents in the quantitative research among all London residents were provided with a list of potential improvements to help with travel costs for travelling to work. Figure 25 shows which ones respondents thought would help them with costs:

- The most popular improvement selected was a discount card for people on low incomes, popular with 28% of skilled, semi skilled and unskilled manual workers

(rising to 33% among semi-skilled and unskilled manual workers) and 33% of those earning less than £1,250 per month

- Flexible usage was also popular for 22% who wanted it to accommodate working from home or off-peak usage and 21% for those travelling less than five days per week. Differences between higher and lower social grades could be, in part, accounted for by a greater likelihood of higher income earners to have an office based job, which can be performed remotely from home. For skilled manual workers/semi skilled and unskilled manual workers, it is more likely their manual type of work needs to be carried out in the workplace. The mode of transport currently used did not make a difference to the level of interest in flexible usage.
- Fewer than one in five selected other reasons, with some sub group differences:
 - Evening/night service extensions were preferred by 18% (particularly by younger adults). 20% of those travelling from an outer borough to Zone 1 supported services starting earlier in the morning, including those in higher managerial, administrative or professional work
 - An off-peak season ticket was also preferred by 18% of respondents, but overall there were no real differences by sub-group
 - A one-hour transferable bus ticket was interesting to 17% of respondents, peaking slightly with bus users (23%), showing across the board interest not necessarily dictated by public transport method currently used
 - 17% of respondents also saw tax-free transport tickets of interest. This was most attractive to those earning less than £1,250 per month (20%)
Respondents across sub-groups showed support regardless of whether they might be eligible for this ticket type or not. Similarly 15% of respondents saw assistance with, or subsidy for, season tickets as an improvement, with no differences by sub-group
 - 13% thought being able to obtain a season ticket loan would be an improvement, peaking with parents (possibly related to their lower disposable income after childcare) and those travelling from outer boroughs to Zone 1 (due to their higher travel costs).

Figure 25. Potential improvements

| | |
|---|-----|
| A discount travel card for people with low income | 24% |
| Greater flexibility to work at home, or at off-peak times | 22% |
| A part-time season ticket, that offers lower prices for travelling less than five days a week | 21% |
| Services that run later into the evening / night | 18% |
| Off-peak season ticket, that offers lower prices for travelling outside of peak times | 18% |
| A 1 hour transferable bus ticket, which allows you to board any bus within 1 hour of buying the ticket | 17% |
| Tax-free transport tickets for people on low incomes, supplied through your employer | 17% |
| Assistance/subsidy to pay for weekly/monthly season tickets | 15% |
| Services that start earlier in the morning | 14% |
| Easy to obtain season ticket loan | 13% |

Source: The quantitative research

Ideas generated from the qualitative research for potential improvements followed a similar cost-reduction theme, but with some slightly different and looser ideas being generated:

- **Discounted travel** similar to supermarket-type loyalty programmes, where regular commuters should receive a discount for frequent usage (a 3-for-2 style offer was discussed). One participant claimed this was done in New York.
- **A different charging system for tourists** to make it more expensive for them. There was fairly wide agreement that regular commuters who pay ‘top dollar’ at peak times support the service for users, particularly tourists, who travel at cheaper off-peak periods. This felt unfair and respondents thought tourists should pay more (there was no mention that ordinary single- and return-ticket fares [i.e. not Oyster or contactless] are more expensive and tourists may be using these, and therefore are already paying a premium over regular users).
- There was also some (more limited) discussion about travel costs being **means tested** to make it more affordable for those on lower incomes.

“Why should people earning £100,000 pay the same as someone on £20,000? It’s just not fair.”

- There was some observation on inconsistency with the zone charging system on the London Underground compared to flat fares on the bus. This was also expressed as feeling unhappy about paying for London Underground travel in a zone that is travelled through even if it is not where you get off (i.e. when travelling through Zone 1).
- There was also some frustration expressed about different modes of transport not being linked up as part of a single charge.

“It’s annoying that you have to pay for a National Rail train and then the Tube, even though it’s just one journey. There should be one price for one journey rather than a price for each mode used.”

The findings would seem to indicate a desire for a simple unified fares structure for all rail and Underground services in London.

3.6 Other issues raised

During the course of the qualitative research, various other themes and ideas emerged. This section outlines these issues.

A common concern discussed in most groups was the reduction in staff at London Underground stations. Without staff on hand, tourists in particular could cause problems when buying tickets as they queue at machines, which they may not know how to use, during busy periods. One commuter whose first language is not English also mentioned that ticket machines are difficult to use and he had experienced difficulties in getting staff to help him to use it.

Worrying for many commuters in the focus groups was further overcrowding. With the London Underground and buses already extremely busy at peak times, there were some mentions that London might end up in a similar state as Tokyo, where commuters are pushed into trains in order to get doors closed. The number of people travelling on the London Underground has grown by 20% since 2000 and by 70% on

London buses¹⁸. Even though the bus network has been considerably expanded over the same time, alongside the addition of the London Overground network (albeit to a smaller extent), the impression from commuters is that public transport in London already fails to cope with the number of passengers using it.

Finally, there were some which were raised by one person or were discussed as quite an isolated issue:

- Having WiFi reception when travelling on the London Underground
- Air conditioning to cover all London Underground lines
- Oyster top-up availability and ability to check 'credit' at bus stops (there was some awareness of apps which could do this)
- More frequent trains and buses
- Having a flexible start time ticket to account for peak and off-peak travel each week. For example, where different shifts are worked each week, a single ticket which would provide the cheapest solution. Also linked to this was a desire for Transport for London to help work out what the best way to buy fares, e.g. *"is a Travelcard worth it this week?"*
- Being able to go into 'negative credit' on the bus similar to the London Underground (although this has recently been made possible, there was a lack of awareness of this among the qualitative research participants)
- Entertainment (TV screens) and water vending on the London Underground.

Cycling

Cycling is a cheap and very efficient mode of transport, though very few people will cycle from the outer London boroughs to zone 1 (for example, only 217 [1.25%] of the 17,385 Croydon to Westminster commuters cycle according to Census 2011). But, for some people, cycling could extend the area of job search and access considerably up to, say five miles, and is also very reliable in terms of journey time.

The majority of qualitative participants expressed the view that cycling was either not feasible for them over the whole length of their journey (they described themselves as 'too lazy' or were concerned they would be too sweaty by the time they got to work) or

¹⁸ Transport for London (2014). The Travel in London: Report 7.

that they felt unsafe in current traffic conditions. However, cycling as a short part of a longer journey involving other modes might be a more realistic prospect, for example to a railway station in a different fare zone from where it would be cheaper to travel into central London. Cycling some of the way might reduce the number of zones travelled through by rail, or remove the need for a bus journey or car parking charges, helping to reduce travel costs overall.

Outer London boroughs and communities, and Transport for London, might like to consider what they could do to integrate cycling more fully into the commuting patterns of low paid workers and job seekers.

4. Conclusions

As expected by the project partners prior to conducting this research, some outer London residents in work on a low income who have to travel to Zone 1 for work are choosing a less ideal commute in order to save money. Although a minority, this still represents a significant number of people. This research reveals that 18% or 140,000 commuters choose their current journey to work in Zone 1 because of the costs involved rather than convenience and, even more importantly, that 9% or 70,000 people could have a better journey if they spent more on their commute to get to work faster.

London's transport network is extensive and multi-modal, offering Londoners, including those in outer boroughs, relatively good access to other parts of the capital. This research shows that, overall, residents of outer London boroughs on lower incomes are also willing to use the most efficient modes of public transport available to them locally to access higher paid employment in Zone 1, despite the high costs involved.

A significant finding from the research is the widespread resignation that people feel towards the cost of travel in London. Most people want the quickest or best commute to work and they feel that they have no choice but to put up with the relatively high cost of travel associated with that. However, people, particularly those on a low income, are concerned about how they will meet rising travel costs in the future. Many people cope with the cost of travel now, but are unsure whether they will be able to continue working in Zone 1 (where they can earn a higher income) when fares are 'expected' to rise over the longer term.

Bus journeys are less expensive than taking London Underground and National Rail services, so it comes as no surprise that people on a lower income are more likely to use this mode of transport. Despite this, the research did not confirm the hypothesis that a lot of low-paid workers are choosing longer 'bus only' commutes from outer boroughs to Zone 1 to save money, since the resulting journey time is seen as impractical, especially during peak hours.

The research reveals a significant disparity in the time it takes outer London residents to earn the cost of their commute each day. Those earning over £600 per month tend to have to work for approximately 20 minutes, however this rises sharply to 54 minutes for those earning £200 to £599 per month and 1 hour 56 minutes for those earning less than £200 per month.

Many of the views expressed by workers in the qualitative focus groups are echoed by jobseekers in the qualitative depth interviews. Jobseekers are also concerned about the cost of their potential commute to work, which influences the types of jobs they can apply for.

Jobseekers are not being informed about the Jobcentre Plus Travel Discount in a consistent manner, meaning that some jobseekers who would benefit from it are not given the opportunity to do so. The discount is not only seen as useful for jobseekers to access job interviews, but also provides access to social activities in order to reduce the feeling of isolation.

The research also shows that renewing the Jobcentre Plus Travel Discount card may be challenging since not all Jobcentres have the facility to renew the card, new cards require a new photo each time, and new cards need to be linked to Oyster cards to take advantage of the discount. Jobcentres and Transport for London should ensure that renewing a travel discount card and linking it to the Oyster card is as quick and easy as possible so that jobseekers do not miss out on discounted travel.

It was anticipated that there would be a greater North-South divide in travel costs, due to the wider availability of less expensive Transport for London services in the North and a greater need to use more expensive National Rail services in the South, but the research did not support this.

Further investigation is needed to more fully understand the geographic disparities uncovered in the research and to contrast these against other borough-level statistics.

Recommendations

The research identified several potential improvements which might ease travel costs for lower-income Londoners:

1. Concessionary fares

Low-income workers would benefit from a concessionary fare, similar to existing discounts and concessions, to reduce the burden of travel costs. Over one in five research participants support this. Participants also recommended tax-free transport tickets for people on low incomes.

A simplified fare structure covering all rail, Underground and DLR services could also help meet this objective. The case study of a worker from Chadwell Heath shows the positive effect of such a change that could be replicated elsewhere in London.

Tax allowances for the cost of travelling to and from work by public transport and other sustainable modes would also significantly benefit people on lower incomes proportionately more than those with a higher income. They would also encourage uptake of employment, and those already in employment but commuting by private car, to switch to public transport. The benefits of this would be an increase in employment, but also other benefits arising from reduced car usage, such as improved air quality and individual health.

2. Improving awareness of existing discounts

Londoners on a low income would benefit from improved promotion of existing travel discounts, such as the recently reduced daily cap for Oyster and contactless card users to one-fifth of the cost of a seven-day Travelcard to benefit part-time workers. Participants in this research would appreciate such flexible ticketing to accommodate working from home and part-time working.

Similarly, jobseekers should more consistently be made aware of the Jobcentre Plus Travel Discount. The qualitative research reveals mixed levels of awareness and usage. Without exception, participants viewed it positively as

something to help with getting to interviews, helping in the first few months of employment and offering a social lifeline when unemployed. How the discount is applied to Oystercards needs to be better publicised by TfL, especially with the closure of London Underground ticket offices.

3. The role of Jobcentre Plus

Most people have a very limited understanding or experience of where and how they can travel from their home within a given time frame, and so tend to choose or consider only routes, modes and destinations that they know well. This means that there will be significant gaps in their knowledge of the range and location of jobs that are accessible to jobseekers.

Job centres hold data on the availability of jobs and advise clients of the catchment area within a 90 minute journey time of the clients' home address. TfL and other transport providers hold mapping data showing journey times by mode by postcode. These two sets of data can be used to show job centre clients the catchment area within which they could easily get to jobs that are available. They should be collated and shared as part of the initial 'signing on' process for new applicants or in the case of existing clients as part of the process for validating that they have been actively looking for work.

4. Use of accessibility mapping for employers

Employers can also benefit from accessibility mapping when making decisions about where to locate their premises, particularly when considering how to get the best selection of available candidates for jobs and to retain existing staff.

5. Season tickets and Travelcards

The research participants would like it to be easier to obtain season ticket loans, including for a part-time season ticket offering lower prices for workers travelling less than five days a week. They also supported the idea of assistance or a subsidy to pay for weekly or monthly season tickets. Research participants said they would appreciate fares to incentivise those able to travel off-peak.

Off-peak Travelcards could be reinstated to benefit flexible working schedules, especially for those commuting from the outer boroughs to central London, which might also help to relieve congestion during peak times.

Other potential improvements:

- Employers could be encouraged to cover the cost of travel to job interviews, with successful applicants reimbursed only when they start the job.
- Transport for London could give more prominence to the 'one more journey' facility on Oyster PAYG and contactless card payments, similar to that available on London buses.
- Extending bus and train services for travel in the early morning, late evening, night and at weekends would benefit people in low-paid jobs, which may tend to start and finish outside traditional hours. Research participants wanted to see services that start earlier in the morning and run later into the evening and night.
- Cycling could extend the area of job search for those seeking employment as well as play a part in reducing overall travel costs for part of the journey made by low-paid workers commuting into central London.

This research provides a snapshot view of how residents of London in work on a low income and jobseekers living in outer London travel to work and job interviews. More research is required to monitor the effects of travel costs on low income London residents, especially as fares continue to rise in the future. Continued research and monitoring is needed on the travel choices available to the lowest earners in London and to explore remedies to ensure that transport is affordable to all London residents. The research also identified major geographic discrepancies in the average cost of travel to work which need further investigation.

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Project partners

London TravelWatch is the independent consumer body responsible for representing the interests of all who use public transport in London. It is accountable to, and funded by, the London Assembly. It covers all modes of transport, and its work is underpinned by a series of statutory powers and duties.

Trust for London is the largest independent charitable foundation funding work which tackles poverty and inequality in the capital. Each year, it provides around £7 million in grants and, at any one point, is supporting some 400 voluntary and community organisations.

London Councils represents London's 32 boroughs and the City of London. It is a cross-party organisation that works on behalf of all of its member authorities regardless of political persuasion. London Councils makes the case to government, the Mayor and others to get the best deal for those living and working in London and to ensure that its member authorities have the resources, freedoms and powers to do the best possible job for their residents and local businesses.

BDRC Continental, the UK's largest independent research consultancy was commissioned to conduct the research.

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