

London TravelWatch investigates:

# What is the future of London's transport network?



The voice of London's transport users

[info@londontravelwatch.org.uk](mailto:info@londontravelwatch.org.uk)

#LTWFutureTransport @LonTravelWatch

# Who we are

We are the independent, multi-modal body set up by Parliament to provide a voice for London's travelling public.

This includes users of rail services in and around London, all TfL services (bus, Tube, DLR, trams, taxis) and motorists, cyclists and pedestrians using London's strategic road network (the roads that TfL manage).

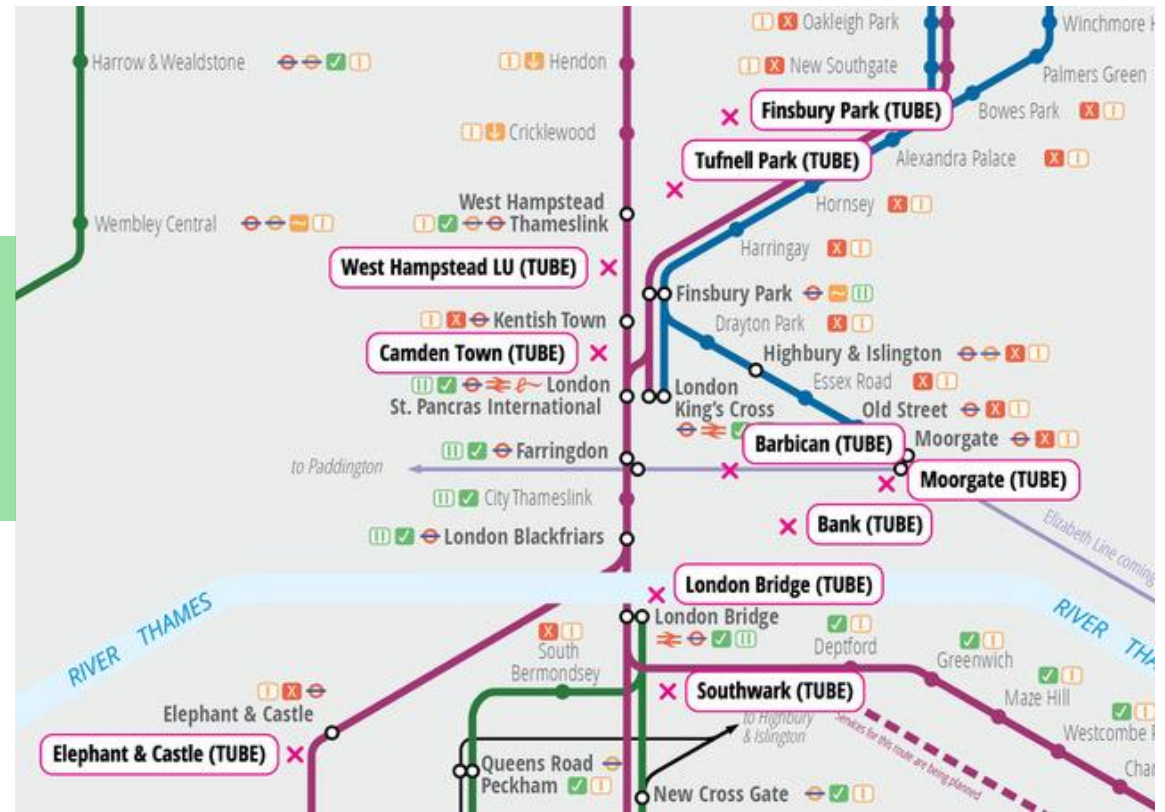
We are funded by and accountable to the London Assembly.

Our aim is to press for a better travel experience for all those living, working or visiting London, and its surrounding region.



# Wins for London's transport users

Following the creation of our own map, TfL agreed to add Thameslink stations to the Tube map



This year we have:

MARCH 2020

Persuaded TfL to raise their target for average bus speeds

Our lobbying led to TfL to bring in a trial of 24/7 bus lanes, to improve bus speeds

APRIL 2020

Persuaded TfL to improve the information on their website and journey planner about travel during COVID-19. This included:

- A new 'refunds' page
- New features showing how busy services are

JUNE 2020

We formed a coalition which helped to save the Zip card

OCTOBER 2020

We persuaded TfL to add Thameslink stations to the Tube map

# Engagement with transport users



## Public engagement

- Digital community of transport users which now has 4,500 members

## Casework

- Improved the number of successful outcomes that we get for passengers who complain about their travel experience
- Helped Eurostar passengers get better access to refunds for trains that were cancelled during COVID-19

## Weekly omnibus tracker poll

- Weekly omnibus survey with Transport Focus of attitudes and experiences to travel

## Survey transport users

- We've just asked transport users how they might be affected by TfL's proposal to stop accepting cash at ticket machines



# An important moment to think ahead

What will the transport network look like in the future?

How will it meet the needs of London's transport users, if those needs are changing?

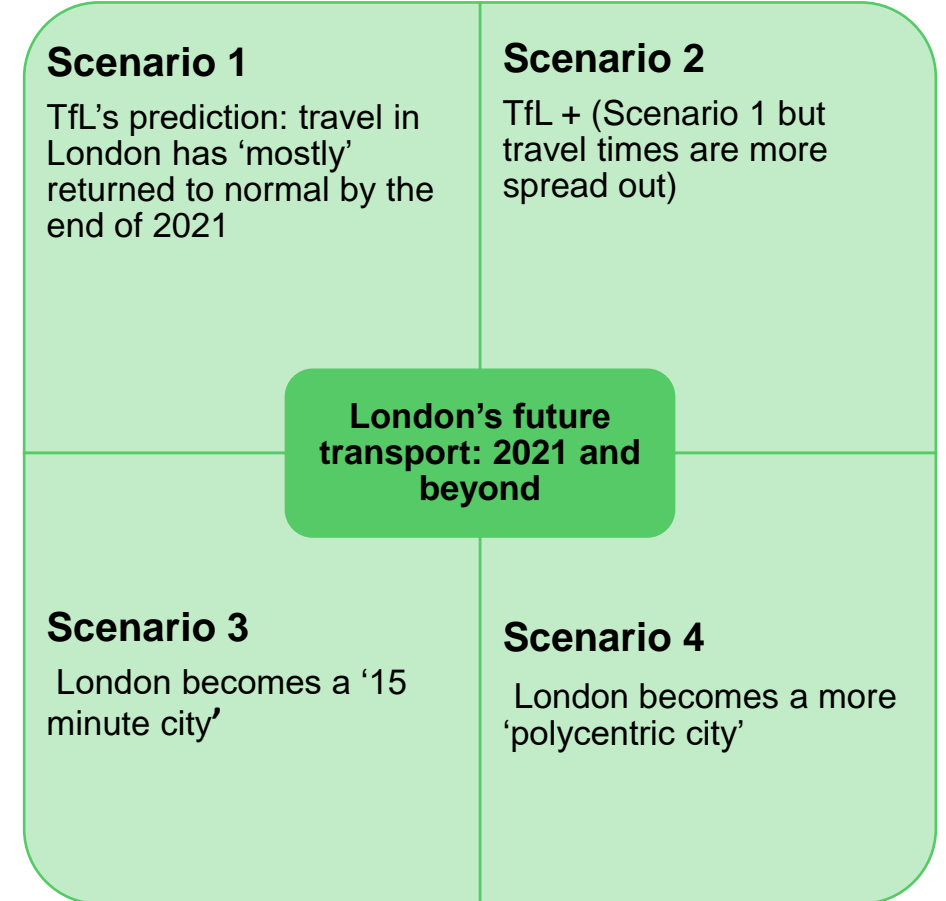
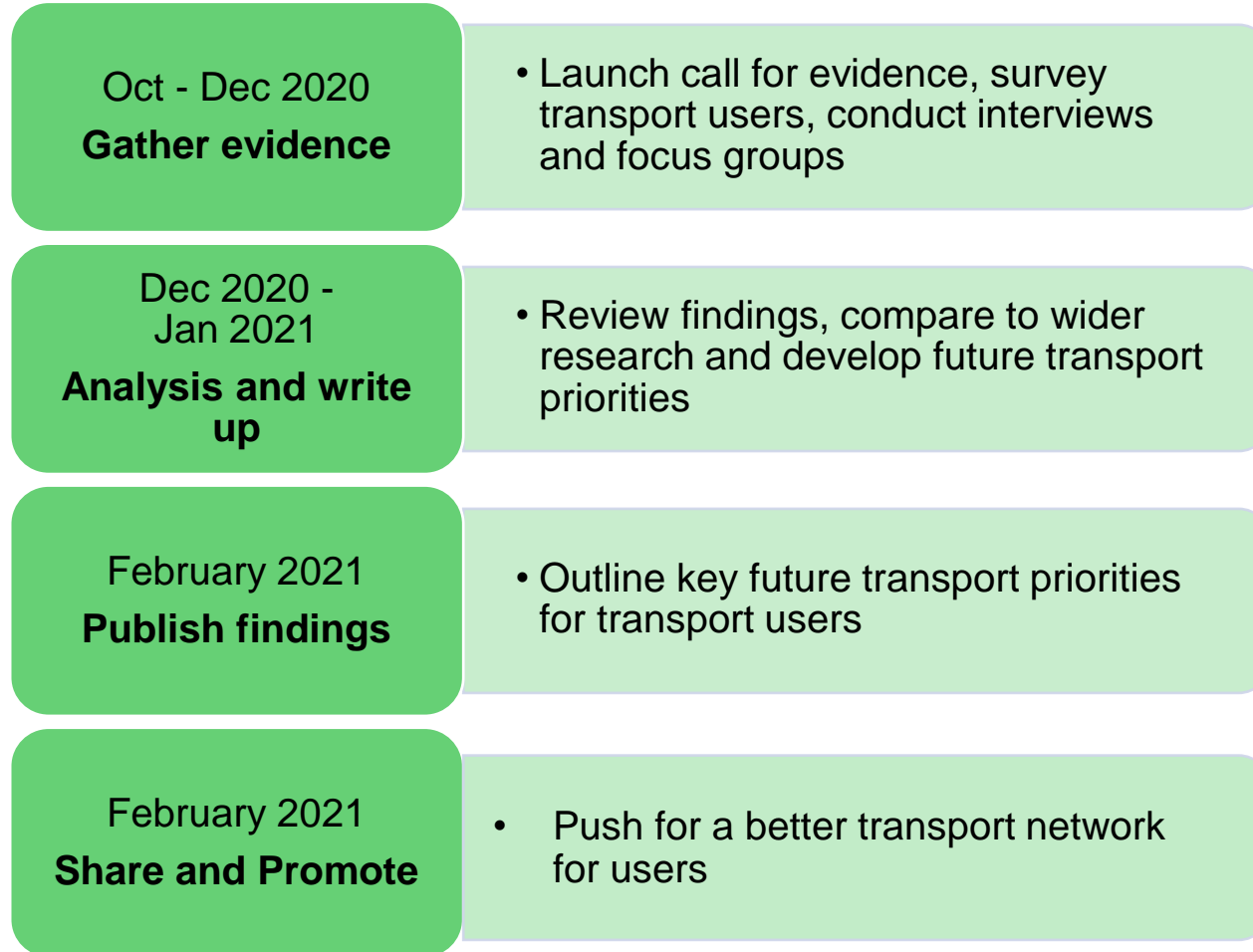
How can we identify what transport users will need, to develop a vision for the future?

Any vision that is developed needs to make sure the needs of all transport users are considered, and suggests solutions or priorities which help as broad a range of transport users as possible to travel safely, sustainably and in a way that meets their needs in the future.





# Future Transport Project



# Transport User Survey – overview of responses

Trevor Rosenberg, Policy Officer



**London TravelWatch** @LonTravelWatch · 6 Nov

What should London's transport look like in the future? We'd love to hear from you. Please fill out our short survey and share with anyone else who may be interested: [surveymonkey.co.uk/r/QJLJ6JL](https://surveymonkey.co.uk/r/QJLJ6JL).

#futuretransport



10

4



- Our online survey
- Thank you for your responses
- Next steps – survey remains open

# Demographics

**68%** aged 55 or over

**12%** aged 45 to 54

**10%** aged 35 to 44

**10%** aged 16 to 34

**55%** male

**44%** female

**89%** White or white British



# Location

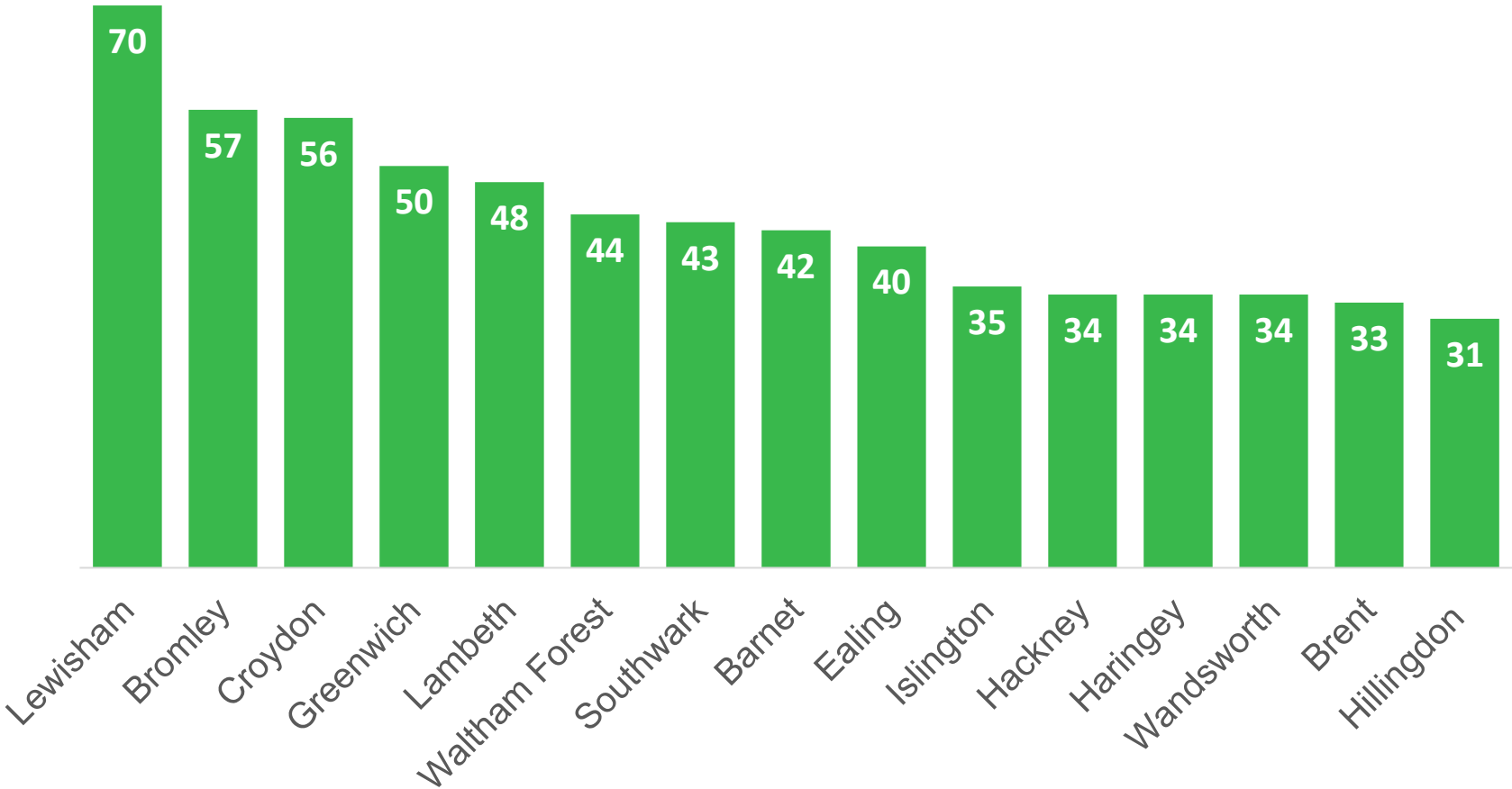
85% of respondents live in London

8% live outside London but travel to and around London often

6% live outside London and occasionally travel to London

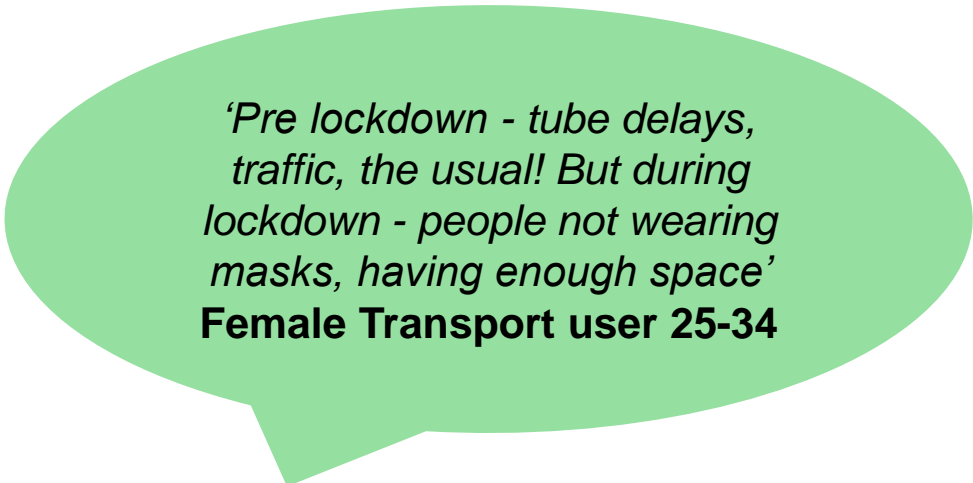
We received survey responses from all London boroughs as well as the City of London

Of those living in London:  
41% live in Inner London 59% live in Outer London



## Can you tell us about any problems you've experienced when travelling in London?

- Overcrowding
- Negative impacts including bus delays caused by infrastructure works
- Covid rules not being applied
- Delays and cancellations on the Tube and trains
- Anti-social behaviour
- Lack of communication and the provision of information
- Lack of accessibility



*'Pre lockdown - tube delays, traffic, the usual! But during lockdown - people not wearing masks, having enough space'*  
**Female Transport user 25-34**

## What do you think would help you most when travelling around London in the future?

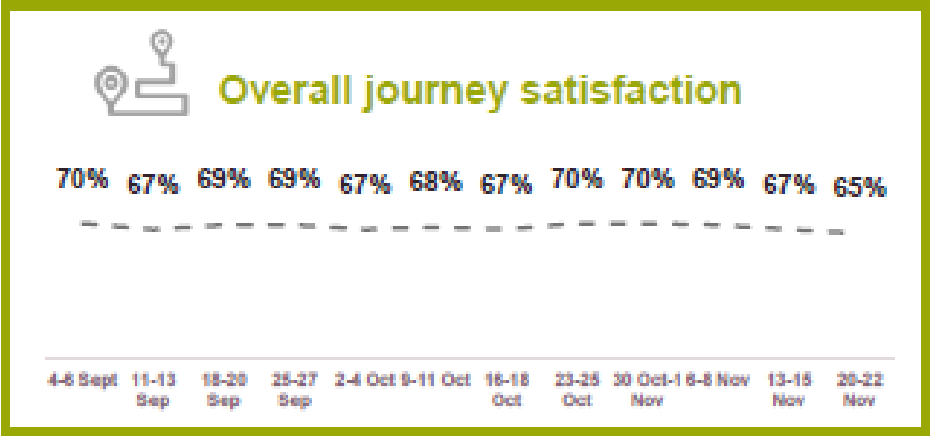
- Better communication and information
- Additional and more reliable services on bus, Tube, train, Overground and Trams
- Better accessibility
- Better infrastructure for cyclists
- More and better staffing and enforcement
- Better enforcement of, and compliance with, Covid rules
- Retaining the Freedom Pass and restoring full use of the 60+ Oyster
- Better local and orbital services, and links

*'New, longer trains. More frequent trains so trains aren't so full. Better East-West transport links. Reduce the amount of cars on the road so buses are faster and more reliable'*  
**Male Transport user 25-34**

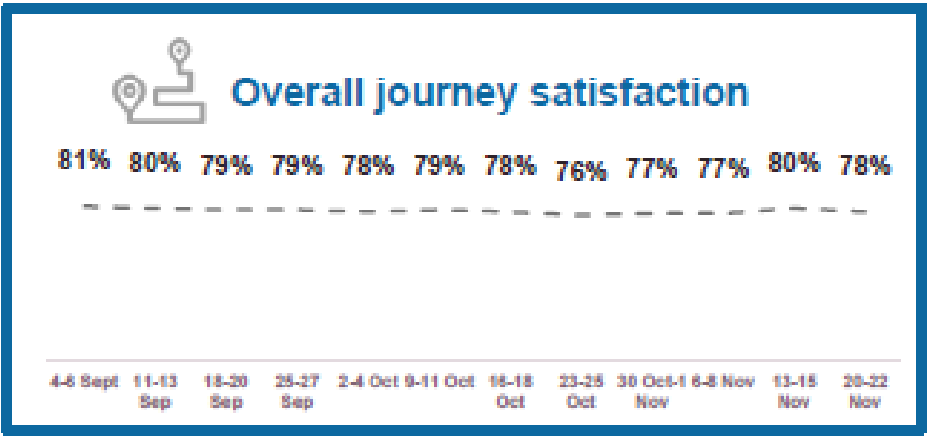
# Comparison with other research

## Transport Focus Omnibus survey

Use and experience of **London bus**...



and bus outside London



When asked if they think they will **drive** more when Covid-19 no longer poses as significant risk instead of using public transport as they did before, 40% of people in London now say they will, compared to 33% nationally

## London TravelWatch Active Travel survey

How have people’s travel habits changed since the start of the pandemic?



# Interviews, Focus groups and written submissions

Saphia Haffejee, Policy Officer



We asked for people to share their thoughts on the scenarios

<b>Scenario 1</b> TfL's prediction: travel in London has 'mostly' returned to normal by the end of 2021	<b>Scenario 2</b> TfL + (Scenario 1 but travel times are more spread out)
<b>London's future transport: 2021 and beyond</b>	
<b>Scenario 3</b> London becomes a '15 minute city'	<b>Scenario 4</b> London becomes a more 'polycentric city'

Feedback broadly fits into the following four categories:

1) Key policy challenges and opportunities	2) Varying needs across London's Geographies
3) Travel behaviour and travel patterns	4) Issues affecting key user groups

# What is the most likely scenario?

## Scenario 1

TfL's prediction: travel in London has 'mostly' returned to normal by the end of 2021

## Scenario 2

TfL + (Scenario 1 but travel times are more spread out)

## London's future transport: 2021 and beyond

## Scenario 3

London becomes a '15 minute city'

## Scenario 4

London becomes a more 'polycentric city'

'I think you will see people coming in a few days a week, but I also see that the sort of investment in local town centres and local areas becomes more and more important – your neighbourhood.'

**Caroline Pidgeon, Assembly Member**

'People have had to change their lifestyles in ways that they never imagined. And I think in a way, more than in scenario 1, this will reflect an even deeper change in people's lifestyles. People will be keen to travel when it's perceived to be less busy, so you're spreading that out, and indeed becoming a much more around the clock/24-hour city, removing those pinch points.'

**Amy Lamé, Night Tzar**

'London will still be a hub for those face to face interactions but with more people coming into London less frequently, and that changes who the passengers are and what they want from public transport.'

**Adam Tyndall, London First**

'In terms of scenarios 3 and 4, I thought this was really great for people with caring responsibilities who are more likely to do trips within their local area rather than go from the suburbs into central London. People with caring responsibilities also need better and quicker transport for going around the outskirts and that would also save them a lot of time.'

**Zhané Edwards, Child Poverty Action Group**

'I would like to see more investment in transport locally. I suspect the scenario is going to be number 2. I think there will be an increase in demand but it won't go back to the levels we saw before Covid for a long, long time. I think people will downsize their offices, particularly the big corporate offices, and even if they don't they won't have the same number of people in them as before.'

**Keith Prince, Assembly member**

# 1) Key policy challenges and opportunities

## *Example: Public health and feeling safe*

'Health impacts are more wide reaching than previously though – not just respiratory. Lockdown had given a taste of cleaner air.'

**Caroline Pidgeon, Assembly Member**

### Air quality

'Poor air quality disproportionately affects working class communities of colour. [The] Runnymede Trust see air quality as a racial justice and class justice issue.'

**Runnymede Trust response**

### Overcrowding and risk of transmission

'We've also got overcrowding on buses which, with low mask compliance, could cause fear of using transport particularly among people from a BAME background who are higher risk of contracting Covid and becoming seriously ill.'

**Zhané Edwards, Child Poverty Action Group**

'Being a pedestrian in London is extremely difficult - it ought to be one of the most walkable cities in the world, but in recent decades it has been designed around car use. Congestion, filthy air, noise pollution, terrible crossings, no pavement space all make for a stressful pedestrian experience.'

**Male Transport User, 25-34**

'Too many cars on the street and the air is really awful from the pollution. I sometimes feel sick walking near the roads.'

**Female Transport user, 45-54**

'Very noticeable air pollution and heavy traffic when cycling'

**Female Transport User, 25-34**

'[There is] A lack of social distancing - overcrowded trains/buses, and no enforcement on the mask rule meaning there are always many people without masks which makes me feel uncomfortable'

**Female Transport user, 16-24**

## 2) Varying needs across London's Geographies

*Example: South London*

'Better connections across South London'

**Female Transport user, 45-54**

'Have more buses travelling East to West in South London'

**Female Transport user, 55+**

'More frequent tubes and buses outside Central London'

**Female Transport user, 55+**

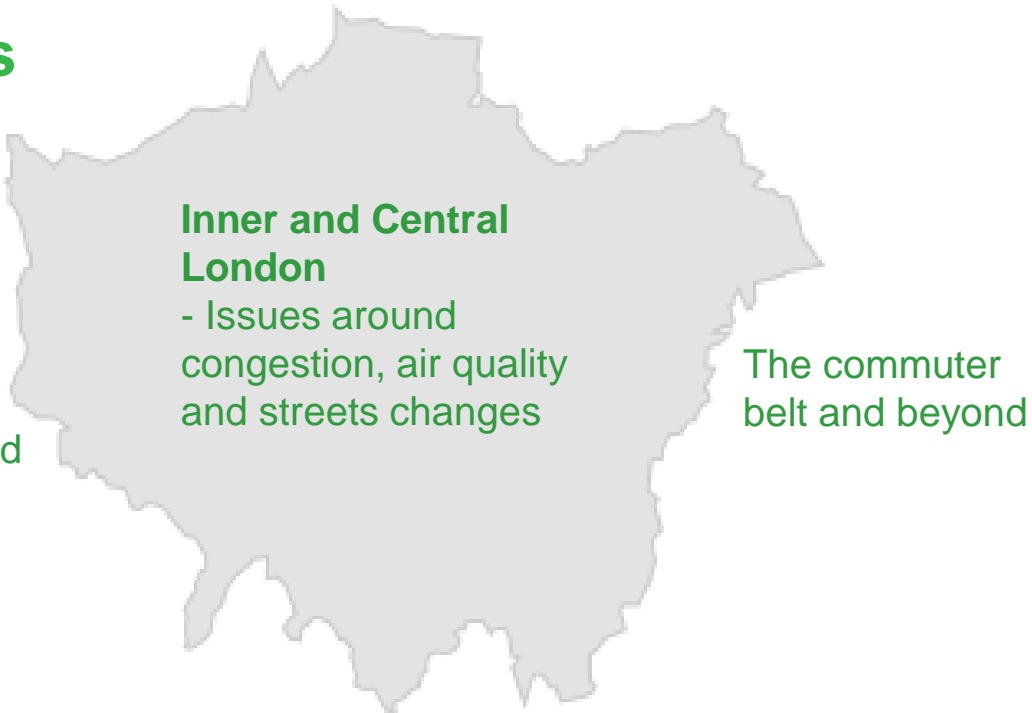
'The recent "modernisation" of the bus network has impacted travel from south east London significantly. Bus routes like the 171 need to be reinstated'

**Female Transport user, 25-34**

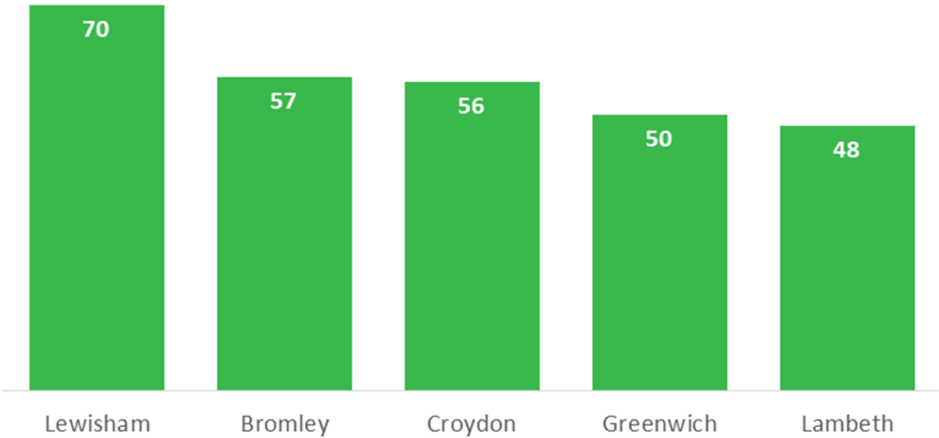
'A transport system better matched to modern travel patterns. Too many services are still in and out of Central London. Better suburban orbital services are needed.'

**Male Transport user, 55+**

- Outer London**
- Higher car use
  - More concern about transport links into central London and around outer London



The highest proportion of responses came from south London boroughs





### 3) Travel behaviour and travel patterns: a mixed picture

‘There has been a drive towards personalisation especially the growth of ride hailing, next day deliveries, online shopping and micro-mobility. People are more mode agnostic and there are more people keen to use individual forms of transport rather than collective ones and I don’t think we’ve quite caught up with what that means.’

**Adam Tyndall, London First**

‘65% of Londoners are active at night, and they’re doing all sorts of different things: shopping, running errands, socialising, playing sport, going to community groups, and we also know that 25% of Londoners go to bed after midnight.’

**Amy Lamé, Night Tzar**

‘many low income jobs happen outside the home so these people with low paid jobs are more likely to use public transport.’

**Zhané Edwards, Child Poverty Action Group**

‘The future is very much around different forms of personalised transport and the flexibility they afford that public transport just doesn’t...If you have access to micro personal transport or even macro personal transport it affords you that flexibility and time-saving that can’t be done on public transport.’

**Keith Prince, Assembly Member**

‘people will want to return to normal, and there will still be a general shift towards what people will consider to be normal’ but also ‘retain some of the positives that we’ve gained through this new way of working’

**Spencer Palmer, London Councils**

‘for some people it’s [the pandemic] really radically changed their lives. And I think some people I know locally who juggle children, top jobs working full-time...not having the commute has completely changed their lives...Other people, actually, like that commute. They like that hour where they get to read. And it’s their time and nobody can get a hold of them’

**Caroline Pidgeon, Assembly Member**

### 3) Travel behaviour and travel patterns

#### *Example: Work journeys*

##### **Women and trip-chaining**

'I think that's also why the hopper fare is so good for women because you're leaving work, you're going there, you're picking up a bit of shopping, then you're hopping on the bus, picking up the kids from school, get the kids on the bus, go home. It's that kind of flexibility and the way that women travel, like you say, that is why the hopper fare has been so brilliant.'

**Amy Lamé, Night Tzar**

##### **People in lower paid jobs**

'The people who are likely to be affected most by the pandemic are low paid people who work in retail, catering, cleaning; and a number of the care workers. 'For them, it'll be a case of having to travel in. There is a higher concentration of people in lower paid jobs living in outer London boroughs. And currently the majority of jobs that they'd be engaged in are likely to be in central London...they generally don't have the flexibility of changing working hours – unless their employers permit - there is likely to be a concentration of people on buses, Tubes and Overground early in the morning'.

**Bharat Mehta, Trust for London**

##### **Lack of choice**

'One of the reasons we've got such high levels of covid in Havering, I'm told, is because residents of Havering are less able to work from home so they would therefore need to use transport.'

**Keith Prince, Assembly Member**

##### **Hidden journeys**

'these are often the people that are hidden, that we don't see and we might not necessarily think about when we are planning for our cities, so that's part of my job – is to make sure that these people are represented.'

**Amy Lamé, Night Tzar**

##### **New long-distance commuters**

'I think it's going to mean that there will be new passenger types emerging. It is entirely plausible that London's labour pool is massively increased. And if you are commuting less frequently you can commute further'.

**Adam Tyndall, London First**

##### **No fixed journey or route**

'The thing about the construction industry is that they go wherever the construction is...your place of work changes from one week to the next. They have to be quite flexible in the way they get to places.'

**Jaime Powell, Berkeley Group**

## 4) Issues affecting key user groups

### **Better connectivity and more affordable**

'[The Runnymede Trust] advocate for better connectivity into central London, because we know that communities of colour have less connectivity into central London, they pay disproportionately more for travel compared to wealthier communities.'

**Runnymede Trust response**

### **Inclusive active travel policies**

'It is not yet clear whether groups previously less-likely than others to cycle in London, such as women, minority ethnic groups, children, disabled people and lower-income Londoners, have seen higher increases in cycling rates than others. More support, in the form of cycle skills, confidence, cycle storage and economic subsidy, is needed to ensure the benefits of cycling can reach everyone equitably.'

**Sustrans, written response**

### **Affordability**

'The main issue I think would be increase in fares, that's probably likely due to the recent TfL bailout. People on low incomes are less likely to own a bike particularly multiple bikes for all their children to travel to school, also for the parents to go to work. Also not all tube stations are accessible which makes travelling for families with young children quite difficult.'

**Zhané Edwards, Child Poverty Action Group**

### **Feeling safe at night**

'[on the Women's night safety charter] it's really trying to help make London be a city where all women feel safe and confident and welcome at night whatever they're doing – whether they're out partying, whether they're working, whether they're studying, you know, whether they're driving the bus, whatever it is.'

**Amy Lamé, Night Tzar**

### **Affordability**

'The affordability of public transport is an issue. That's another reason for making sure that the free alternatives, the conditions for walking and cycling are safe and convenient because that gives people who are able to walk or cycle, that gives them a free and affordable way of getting around our city.'

**Caroline Russell, Assembly Member**

## 4) Issues affecting key user groups: *example: better access*

‘Any group that was disadvantaged before the pandemic, the pandemic has exacerbated that and so that’s something to be very aware of.’

**Caroline Russell, Assembly Member**

‘Unless measures which impact the future of public transport are fully informed by human rights and equality considerations, inequalities will worsen in the long-term... The UK Government and relevant public transport authorities’ response to the COVID-19 will be more effective and sustainable if it considers intersectionality – how to mitigate the disproportionate impact of COVID-19 on groups who share protected characteristics’

**Just Fair, written submission**

There’s really simple things like toilets... if we want our city to be an accessible city we have to have better provision of public toilets.

This also helps the bus drivers, the taxi drivers, the private hire drivers, the Deliveroo riders who also need access to public toilets in their daily lives’

**Caroline Russell, Assembly Member**

‘Our organisation focuses on the needs of the disabled people we represent so we’re not really making predictions on broad societal changes or economic needs... it’s more about filtering processes for how disabled people are involved in these areas’

**Kirsty Hoyle, Transport for All**

[Access] should be a basic requirement rather than a charitable add on... it is usually the first thing to go as we’ve seen with Covid’

**Kirsty Hoyle, Transport for All**

‘Public transport authorities should collaborate with disabled people and organisations promoting the rights of disabled people where decisions are made around the design of affordable and accessible physical environments, information formats and transport infrastructure... to ensure that the minimum core human rights standards are met.’

**Just Fair, written submission**



# Case study: Outer London modal shift

'in the context of further education (rather than higher education where people may be travelling in and out of central London) and skills based training, it was very much about how you could enhance orbital, cross-borough transport links because transport access for learners is likely to be an issue. And I think the same would go for those in lower income, physical or peripatetic jobs, for example in the care market, where people are likely to be living, travelling and working in neighbouring boroughs. So individual transport routes are not necessarily obvious as they might be.'

**Alison Moore, Assembly Member**

'it is clear that more investment in orbital and local journeys outside central London needs to take place, and should be a consideration for public transport (particularly buses) and cycle route planning.'

**Sustrans written response**

'In my borough, if you want to go east to west into London not a problem. If you want to go north to south, it's a nightmare. And that's where personalised transport comes into play to provide that flexibility'

**Keith Prince, Assembly Member**



South Harrow, West Harrow, North Harrow and Harrow-on-the-Hill have lot of stairs going to/from station entrance and to/from platforms & between platforms.

**Male Transport user, 55+**

'Harrow on the Hill has steep stairs to get through, the new lifts will not be of any use'

**Female Transport user, 55+**

'A rapid transit link between the new cancer hub in south Sutton, Sutton town centre and Morden'

**Male Transport user, 55+**

We also have the Royal National Orthopaedic Hospital in Stanmore... You have disabled people going there all the time and Stanmore station is not even step-free... We cannot encourage people to come to the hospital by public transport because we don't have step-free access so they have to drive to it. If we're going to be joined up about this and we want people to use public transport you have to enable them to be able to do it'

**Bob Blackman, MP for Harrow East**

# Case study: Restoring confidence in the bus

'Reduced frequency of buses. Unpredictable arrivals and a not accurate phone app'

**Female Transport user, 55+**

'We used to have a hail and ride 'hopper' bus from the shopping centre around the local streets, really miss that service as it was so easy to get shopping home, seems everything is geared towards people having access to cars now'

**Female Transport user, 55+**

Bus hopper fare has been key in allowing flexibility, and really helps the night time workers'

**Amy Lamé, Night Tzar**

'Delays due to driver instructed to wait a while to even out the service. Secondly, bus destinations are changed unexpectedly leading delays in case one has an important appointment. This makes bus unreliable.'

**Female Transport user, 55+**

Even now, buses are overcrowded. Some elderly people find it hard to stand. Having separate school buses is excellent and should continue in the future.

**Female Transport user, 55+**

'Many of our members have relied on public transport, particularly buses. We are concerned that they may be reduced in frequency if there is falling demand,'

**London Forum of Civic societies response**

'Although buses are frequent, they are regularly delayed by traffic conditions.'

**Male Transport user, 45-54**

'Having paper maps of bus network. This help people not online or who can't afford mobile internet connecting.'

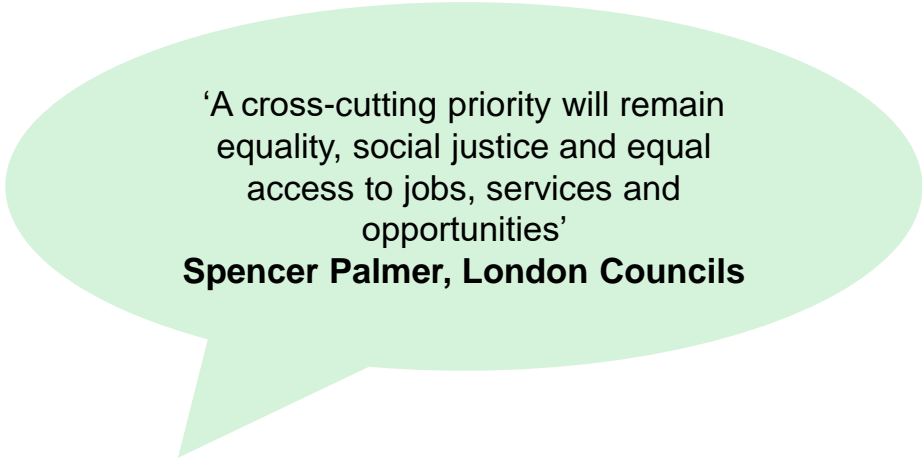
**Male Transport user, 35-44**

'More bus stops with travel Information'

**Female Transport user, 55+**

## Final thoughts and next steps

- An initial look at the findings has shown that there are varying perspectives on what will be needed, but most people think there will mostly be a 'return to normal' with some changes to travel patterns and more local travel
- There's a real risk of cars returning to even greater numbers than before the pandemic, which makes it even more important to find ways to make active travel and public transport more accessible and useful for people
- The need to feel safe when travelling around London is even more important than before, in terms of air quality, accessibility, crowding and personal safety, particularly in a post-pandemic world where public health is at the forefront of everyone's minds
- Next step will be to review the rest of the feedback and compare the findings to other research and data to build a picture of priorities for London's transport users



'A cross-cutting priority will remain equality, social justice and equal access to jobs, services and opportunities'

**Spencer Palmer, London Councils**

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