

Travel in London report 11

Presentation to London TravelWatch

26 February 2019



MAYOR OF LONDON



Travel in London reports and the evaluation process for the Mayor's Transport Strategy

Introduction

The Mayor's Transport Strategy sets a clear policy agenda for TfL to deliver in coming years – it is ambitious, challenging and will require us to do things differently in future.

Travel in London reports are the primary means of monitoring and evaluating progress towards MTS Outcomes at the technical level. They also provide a rolling evidence base for the development and refinement of strategies and policies.

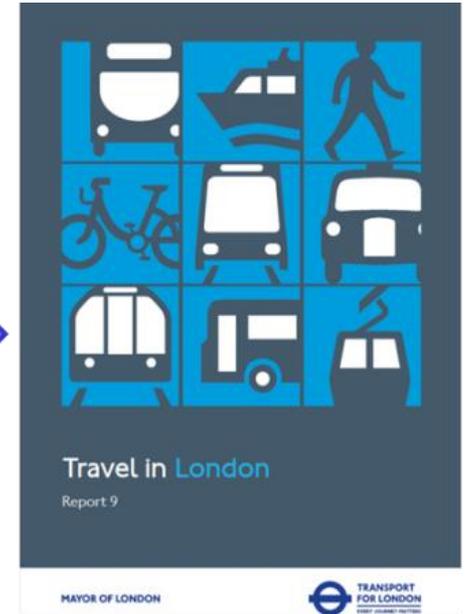
Today I want to give you an overview of:

- What Travel in London reports are and what they do
- What is going on currently with trends relevant to the Mayor's Transport Strategy

Remember it is early days – the strategy has been published for 1 year and runs to 2041. Most of the data I will talk about predates the publication of the strategy.



Evidence – Policy – Evaluation – More evidence – More Policy...



Evidence/appraisal

Strategy

Monitoring/evaluation

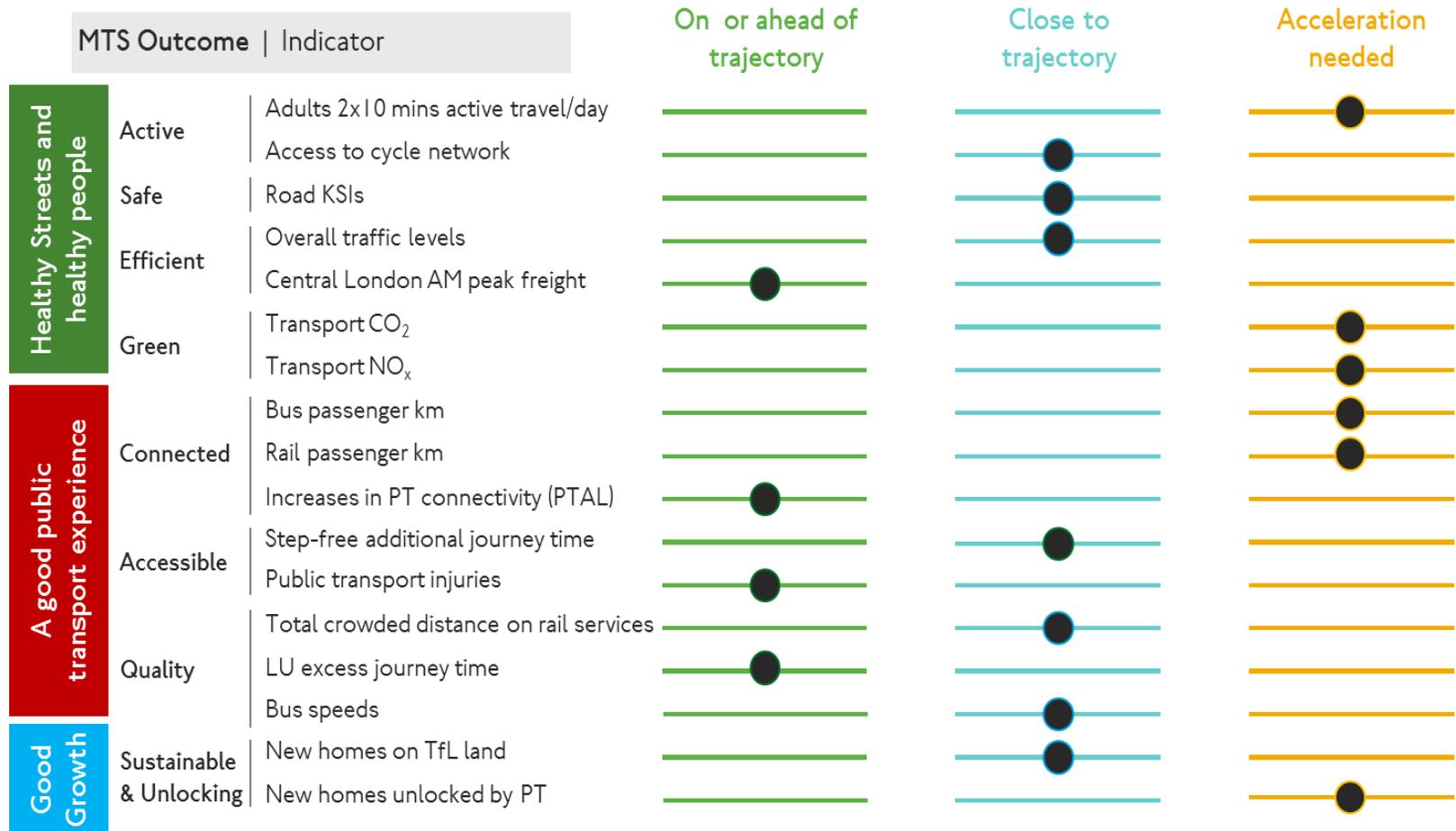


What's the overall picture in this TIL?

- Political uncertainty and economic austerity.
- London's growth slowing.
- Growth in demand for travel slowing.
- Slower than 'expected' incremental progress towards MTS mode share and healthy travel objectives, largely reflecting above – but **early days yet**.
- But, evidence of positive responses where investment has been made.
- There is much here for us to reflect on to continue to refine our policies – and this is the main point.



What's the overall picture in this TIL?

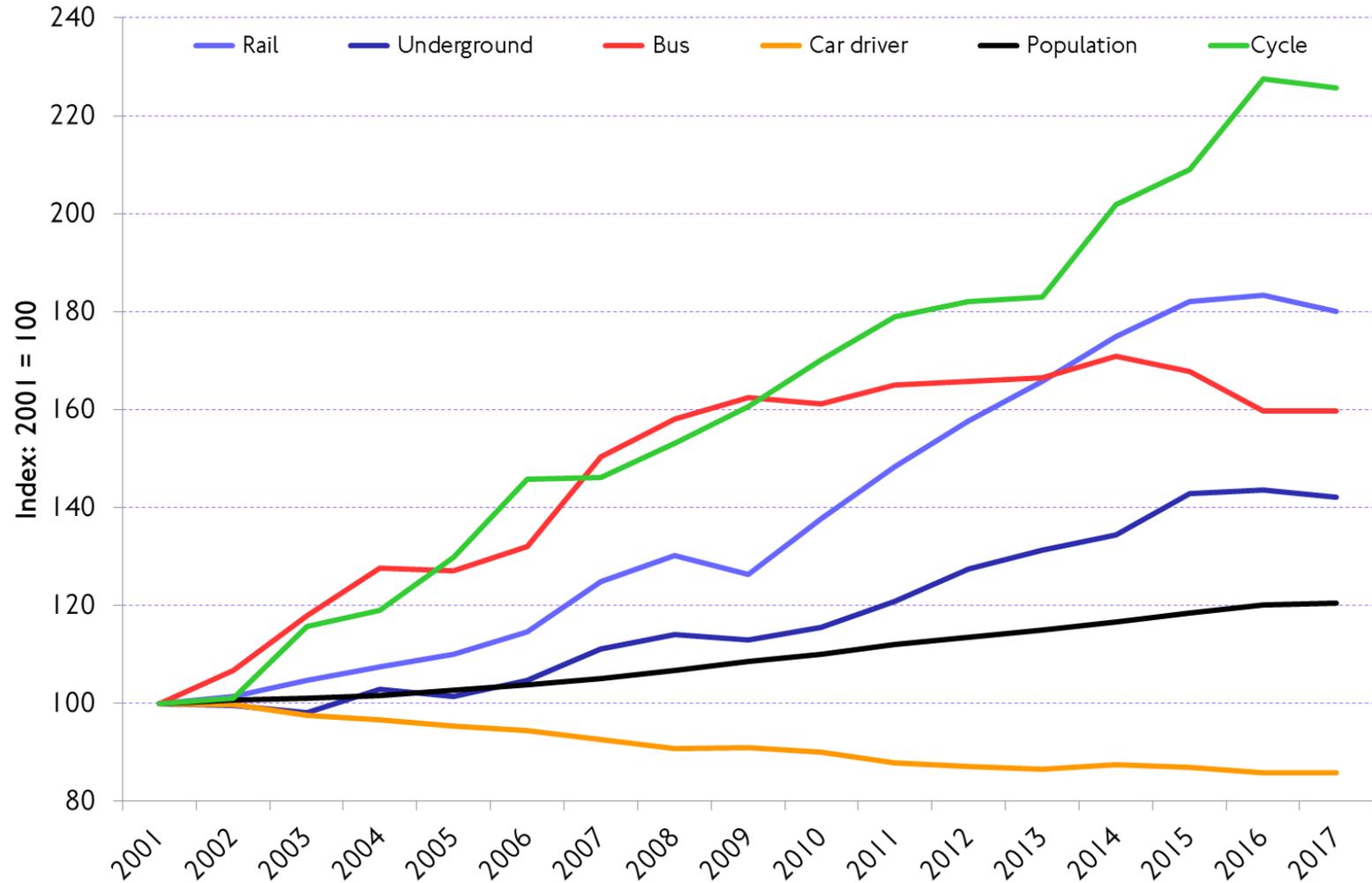


Some high level trends

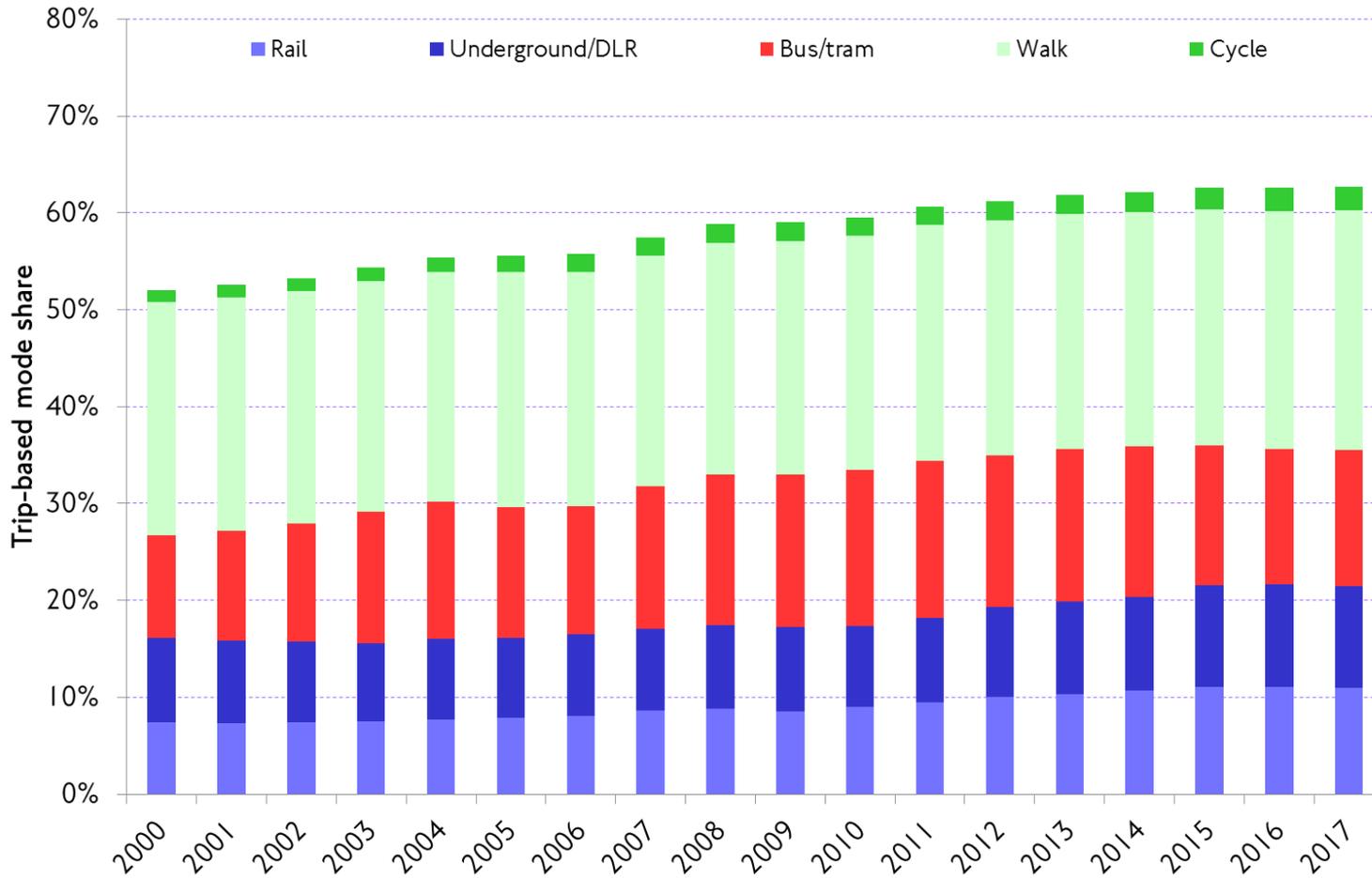
Trips in 2017 remained at the same level as in 2016, with growth of just 0.5% since 2014



Bus use stabilised in 2017, while Underground and Rail demand fell, as did cycling (composite best estimates)



This has meant little change in sustainable mode shares since 2015

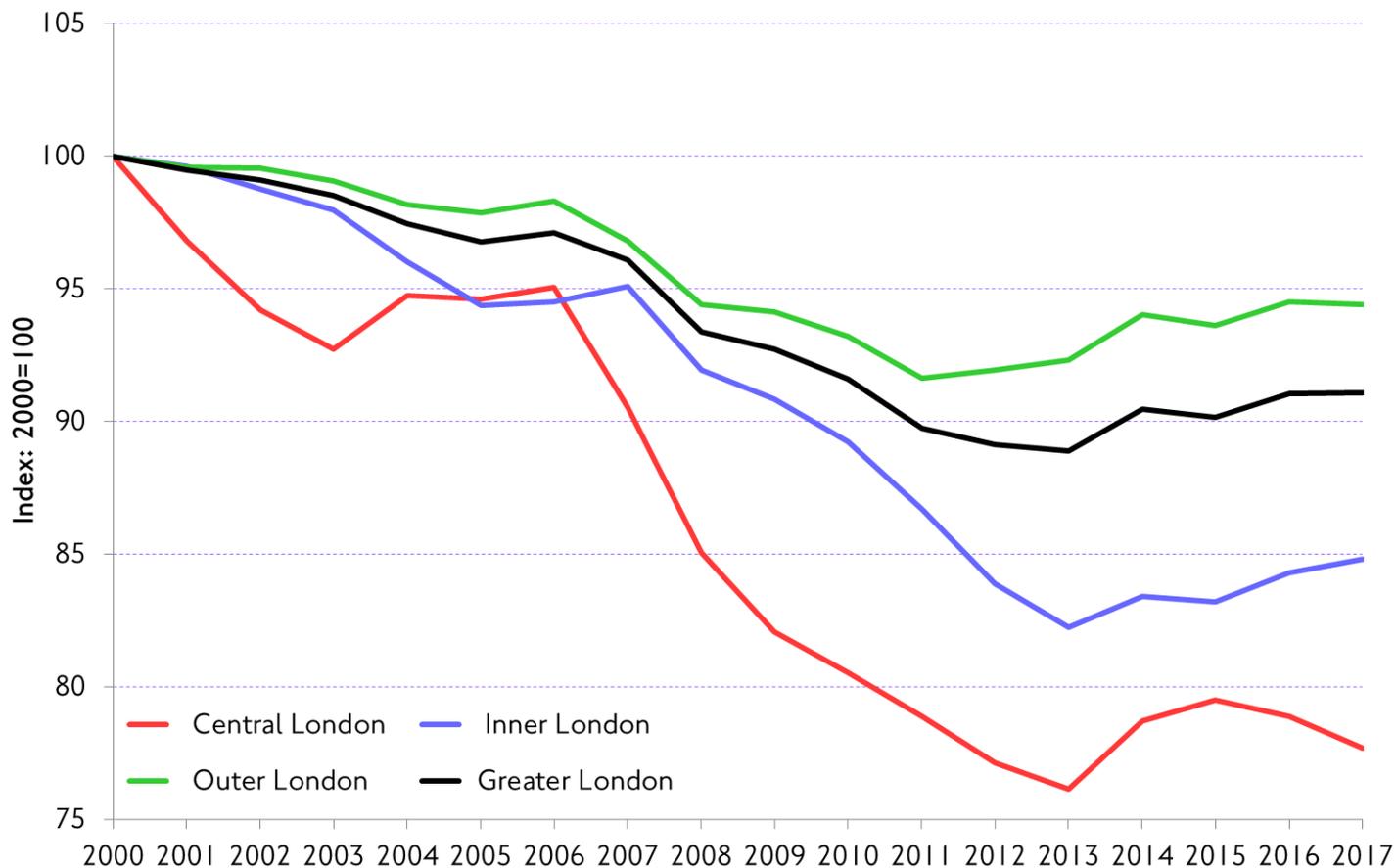


Mayor's target for 2041 is 80%

62.7% sustainable mode share in 2017



The long established trend of reducing traffic volumes has turned since 2013, up by 2.5 per cent



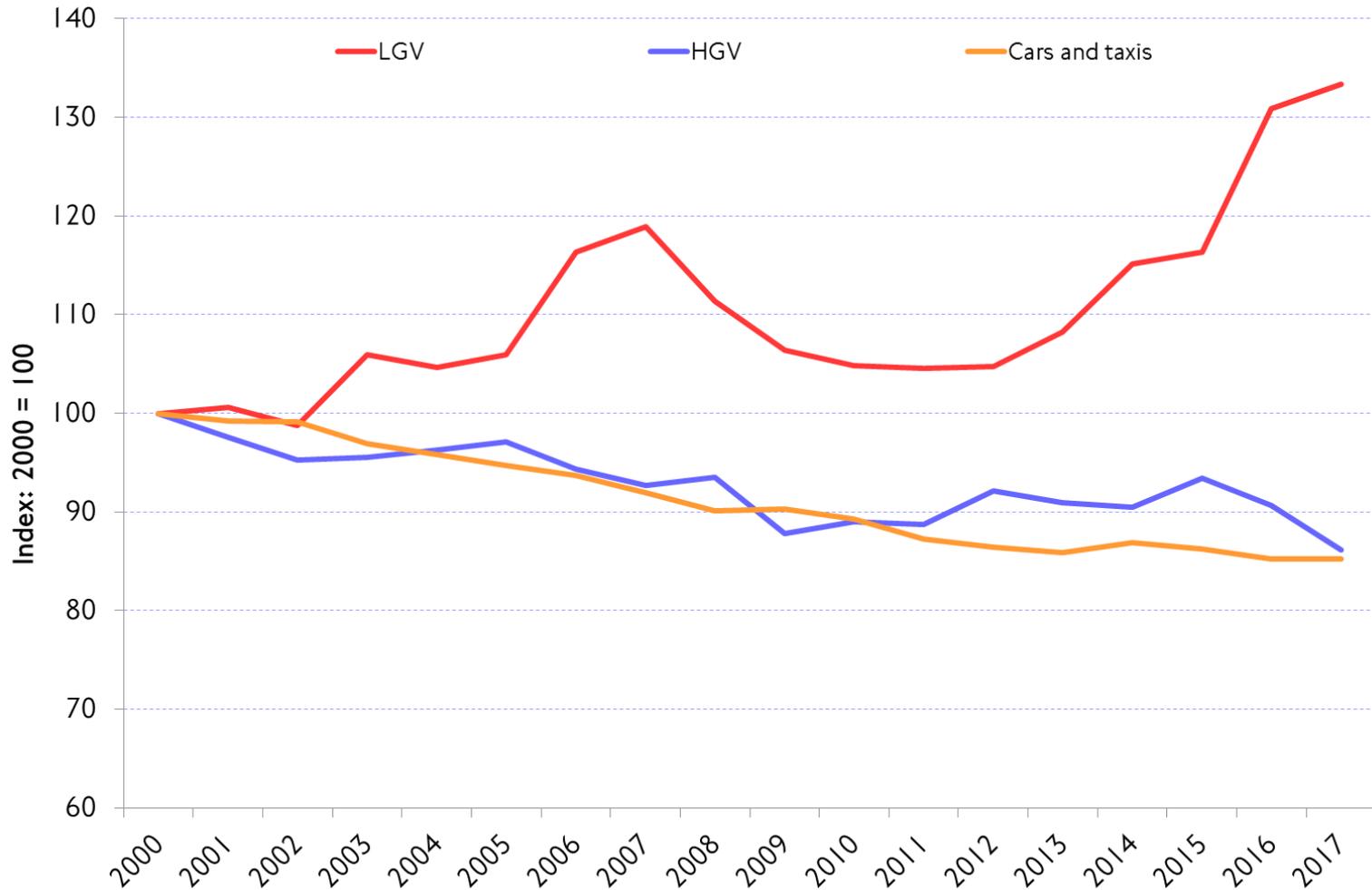
Traffic in outer London down by 0.1% (accounts for ~70% of all traffic)

Traffic in inner London up by 0.6%

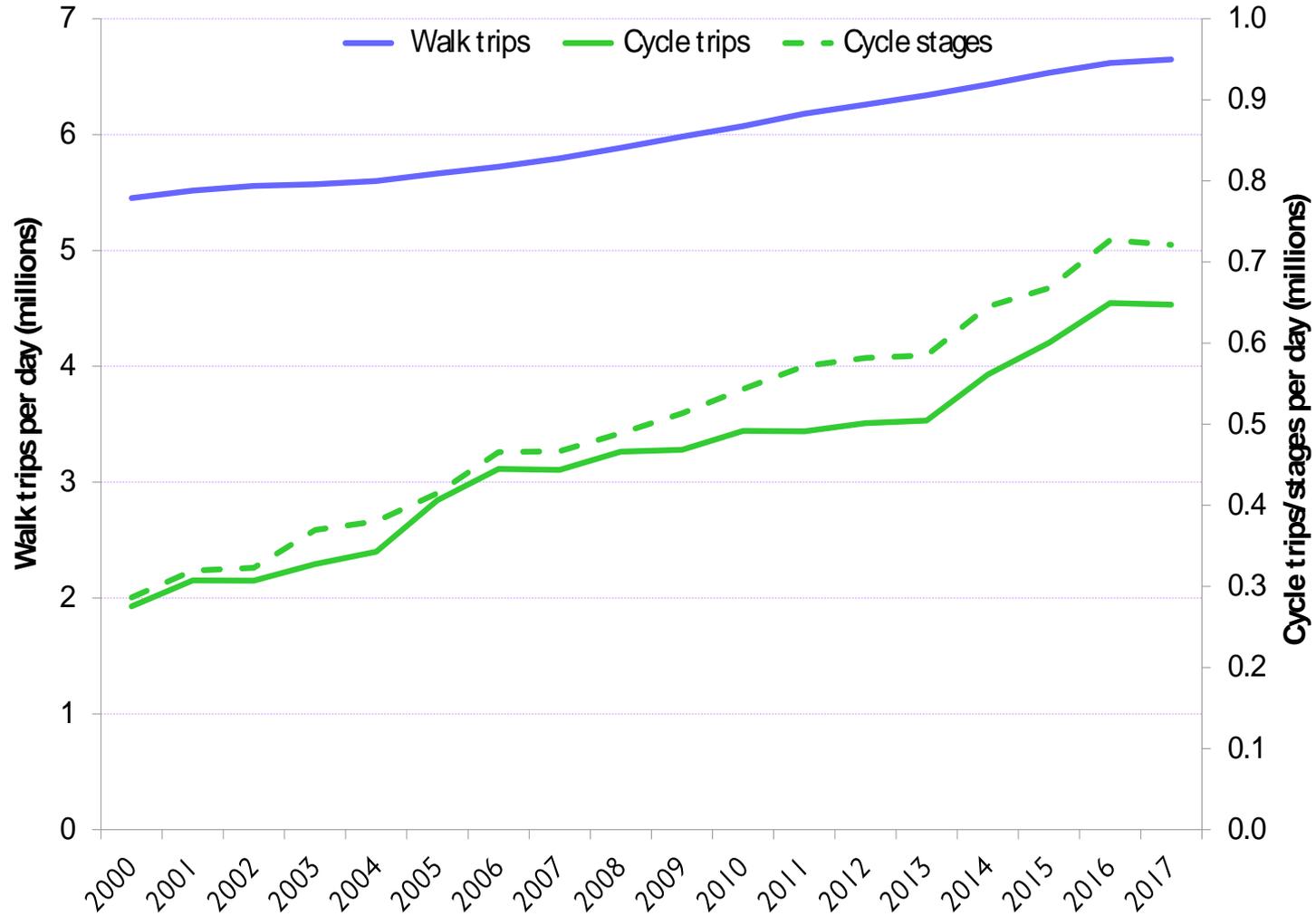
Traffic in central London (not CCZ) down by 1.5%



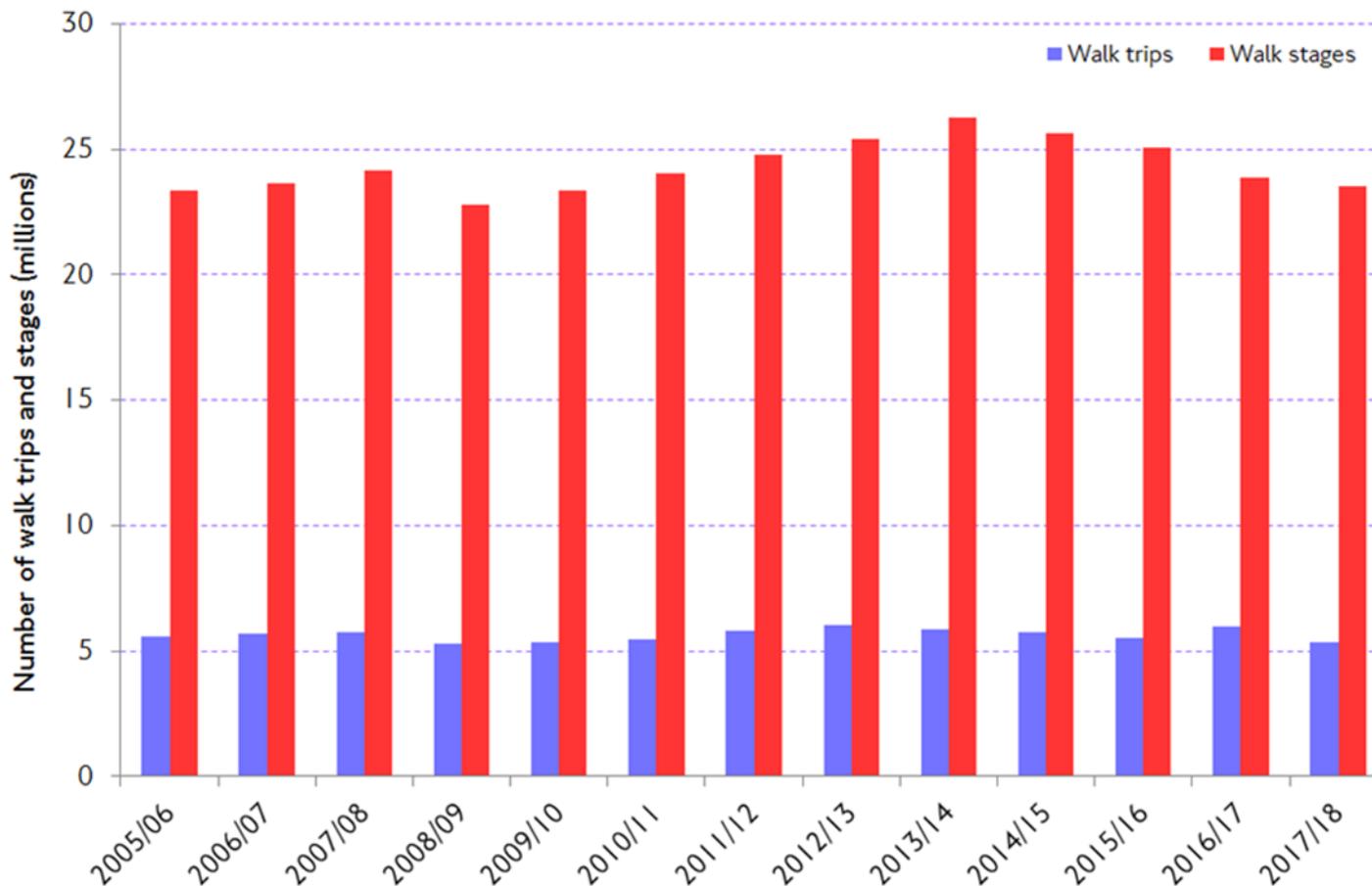
The increase in traffic has been driven by increased LGV (van) traffic, up by 27% since 2012



Trends in walking and cycling



Walk trips (by London residents) have remained relatively stable over time, at just over 5 million per day.



However, walk stages have declined since 2013/14. This is linked to the decline in travel overall – fewer public transport trips means fewer walk stages to access public transport.



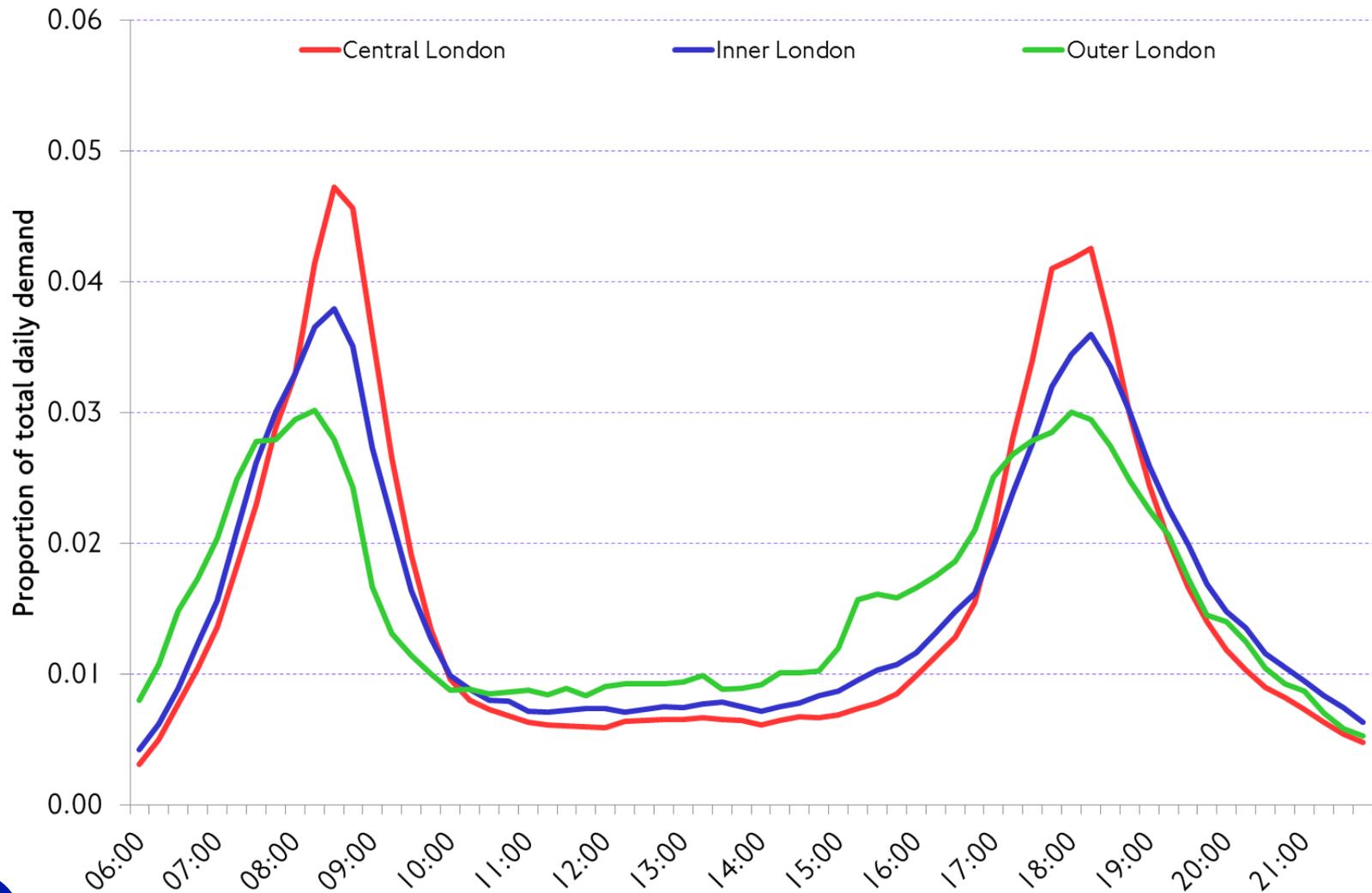
Summary of key estimates of cycling volume in London (direct count estimates)

Metric	2015	2016	2017
Average daily number of cycles			
Central London	1,291	1,287 (-0.3%)	1,298 (0.9%)
Inner London	518	520 (0.4%)	536 (3.0%)
Outer London	125	121 (-3.1%)	129 (7.0%)
GLA total	232	231 (-0.4%)	240 (3.9%)
Average daily kilometres cycled (thousands)			
Central London	527	525 (-0.3%)	530 (0.8%)
Inner London	1,730	1,736 (0.4%)	1,789 (3.0%)
Outer London	1,556	1,507 (-3.1%)	1,612 (7.0%)
GLA total	3,813	3,768 (-1.2%)	3,931 (4.3%)



GLA total

Cycling demand is concentrated around the peaks

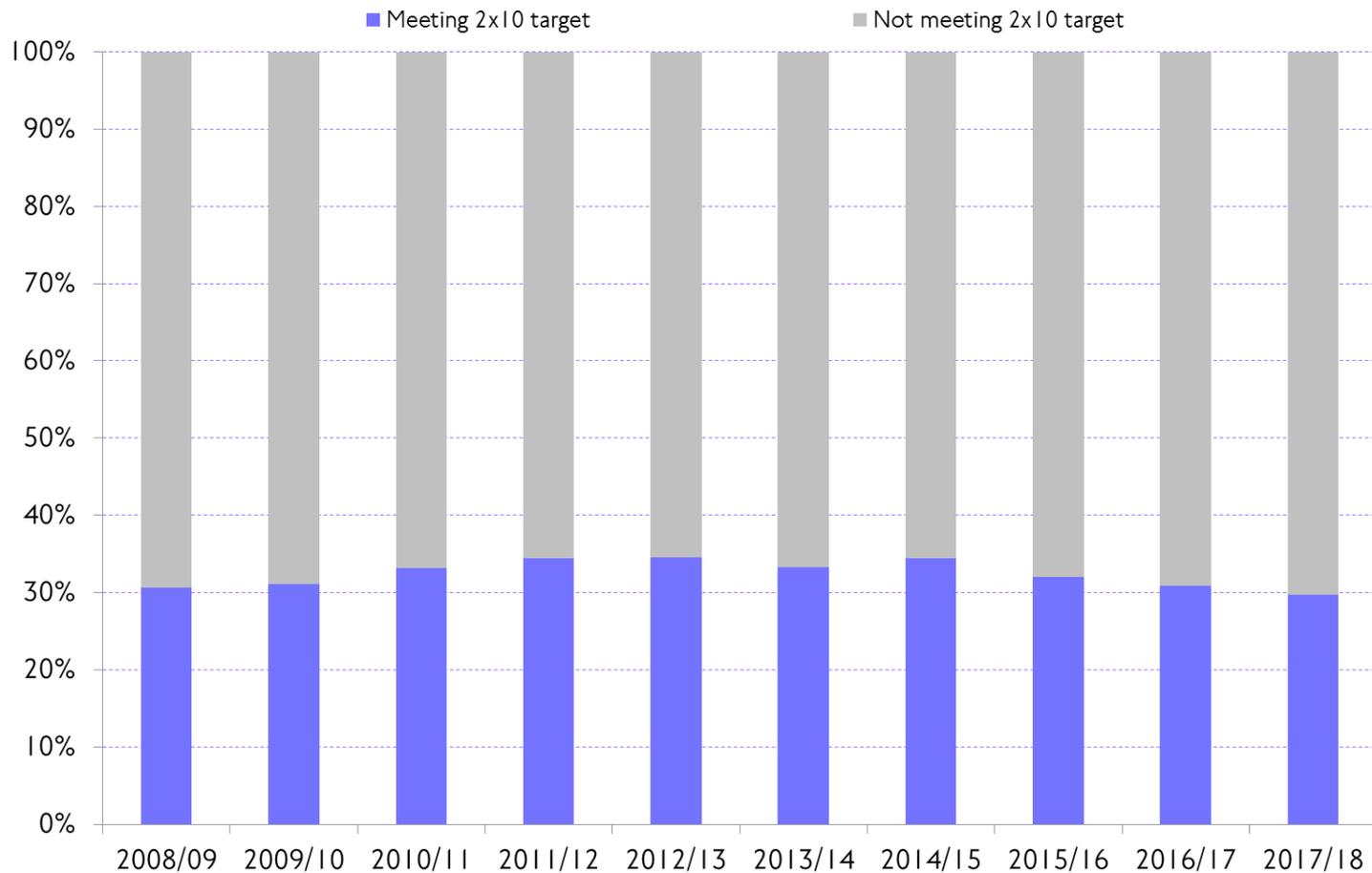


Who are people who cycle?

Demographic group	Population	People who cycled in the last year	People unlikely to start cycling in the future
Men	49%	63%	43%
Women	51%	37%	57%
Under 45	59%	82%	48%
Over 45	41%	18%	52%
White	63%	64%	65%
BAME	37%	36%	35%
Working	61%	81%	51%
Not working	39%	19%	49%
Social groups AB	50%	63%	46%
Social groups C1, C2 and DE	50%	37%	54%
Inner London residents	40%	53%	35%
Outer London residents	60%	47%	65%



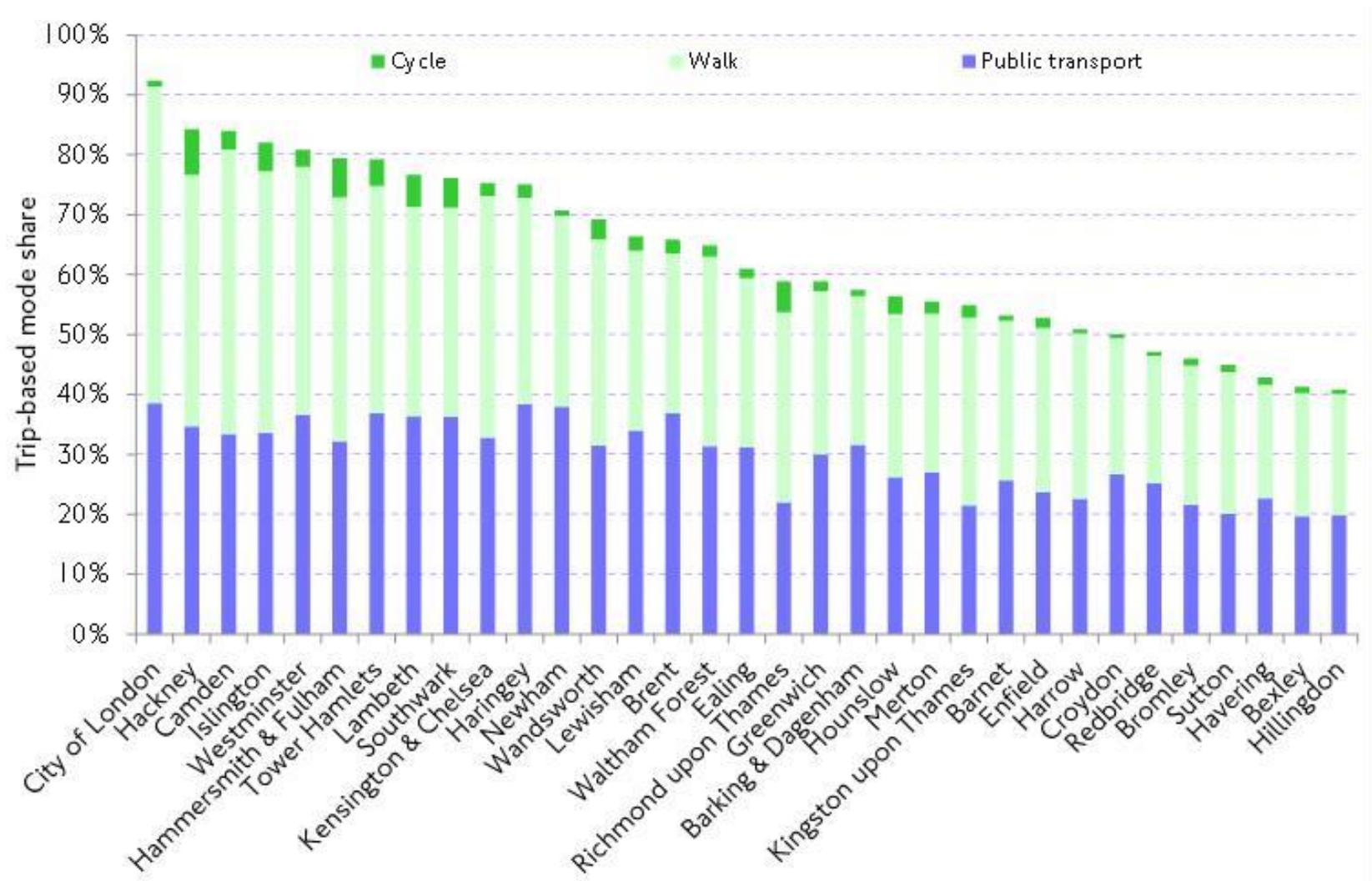
MTS outcome: all Londoners achieve at least twenty minutes of active travel per day by 2041



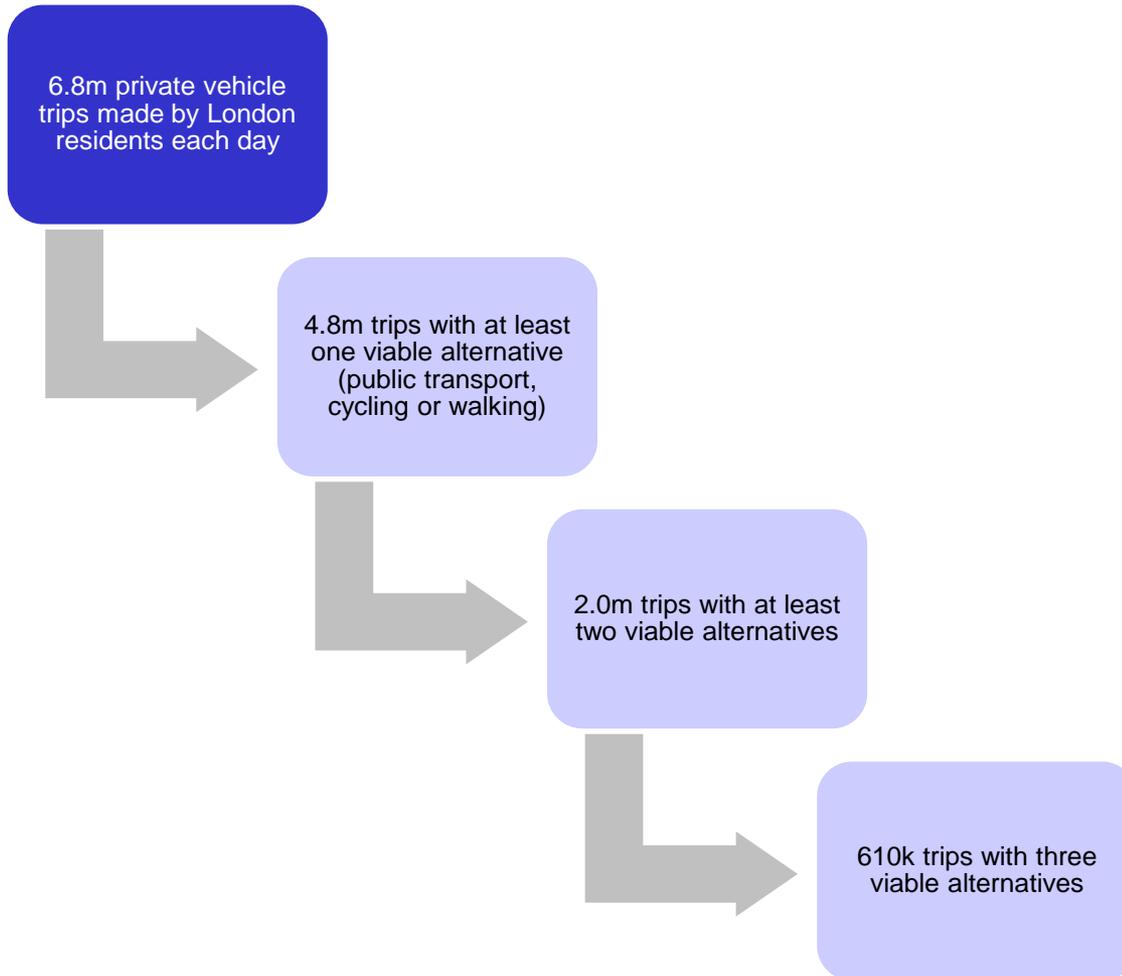
The decline in % of London residents achieving the target is likely a reflection of the wider trend towards lower trip rates, as fewer walk stages are being made in association with PT trips



Spatial variation in Active, Efficient and Sustainable mode share – by borough of residence

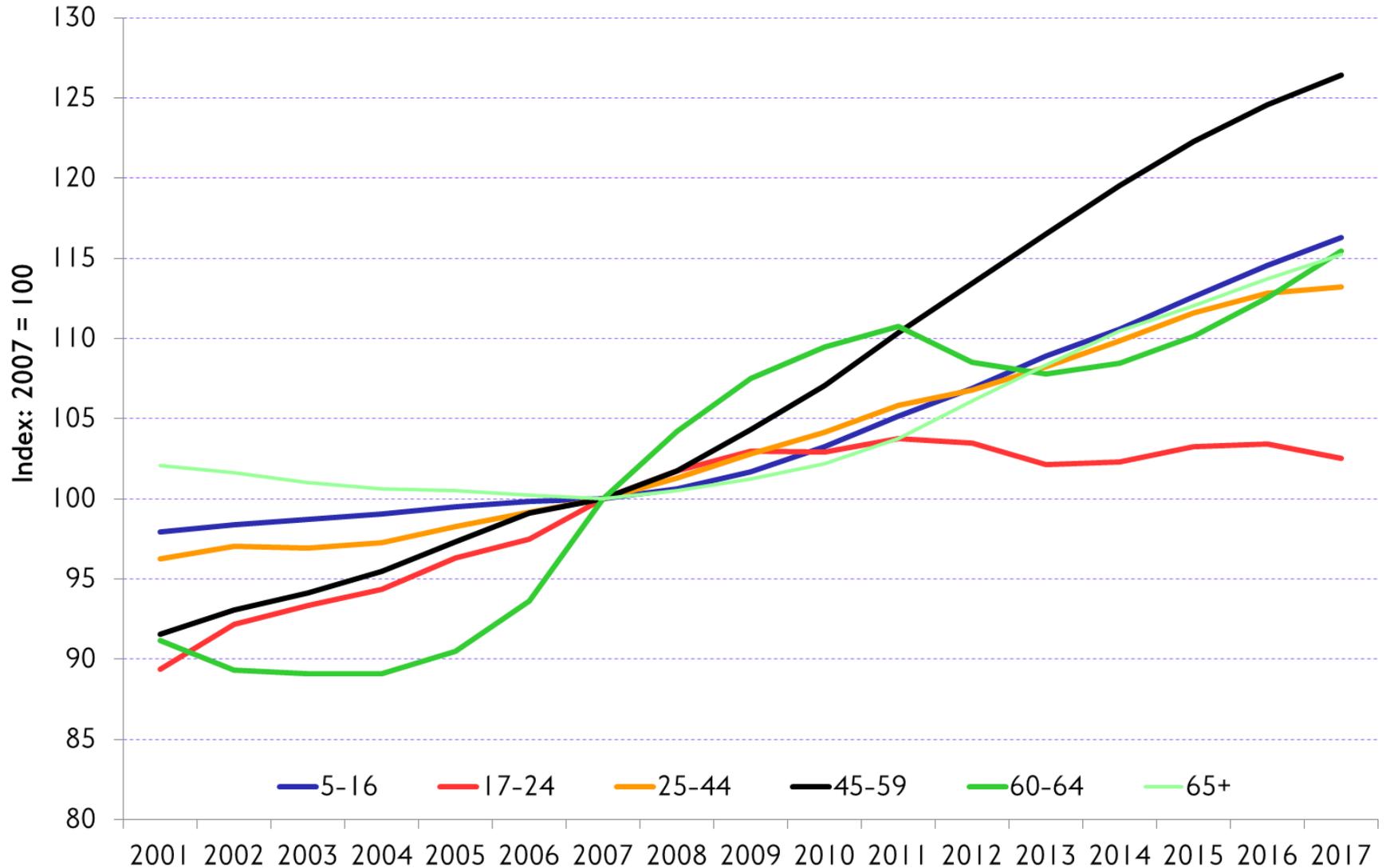


There is huge potential for changing overall mode shares

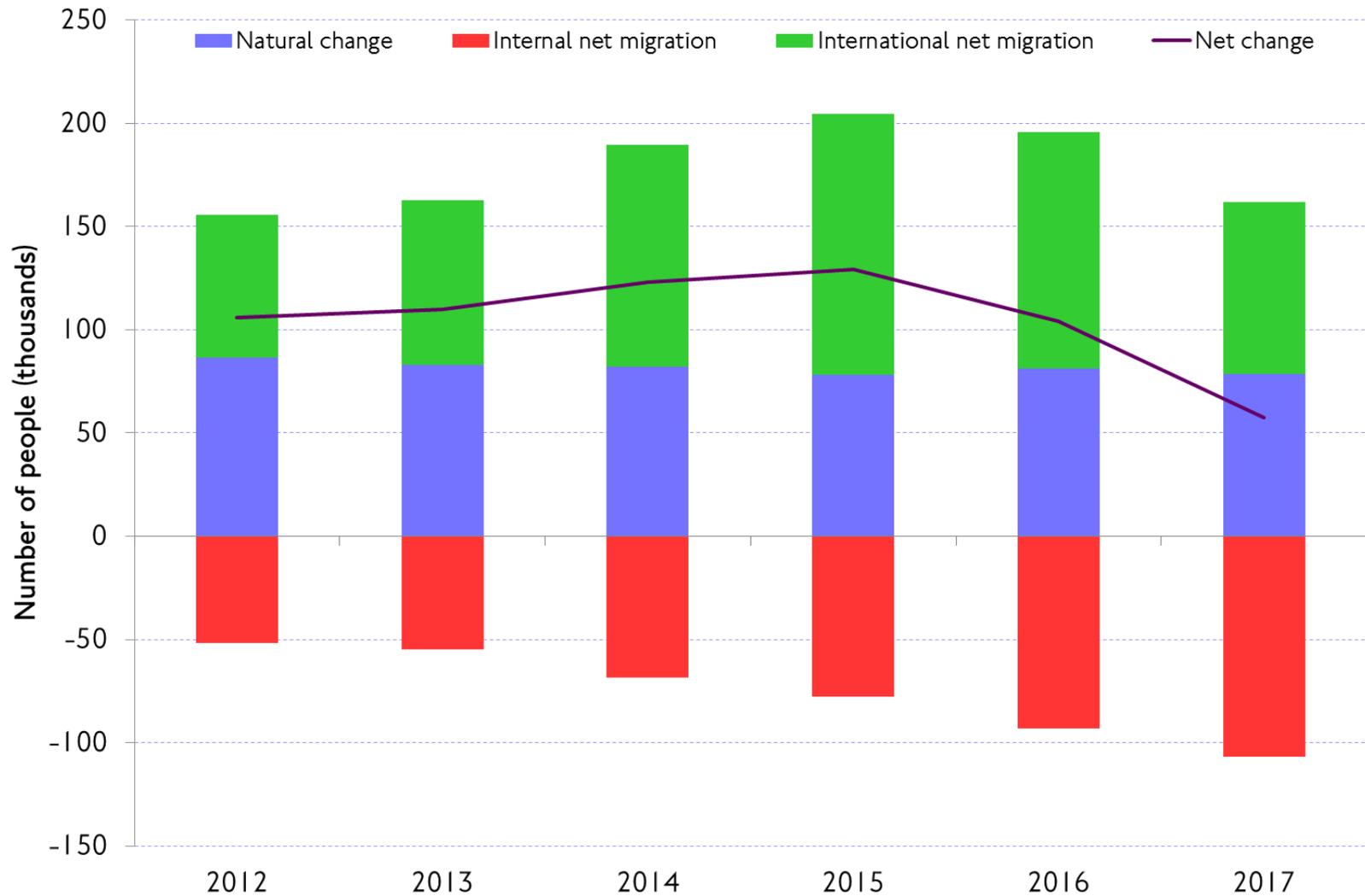


Trends in the drivers of travel demand

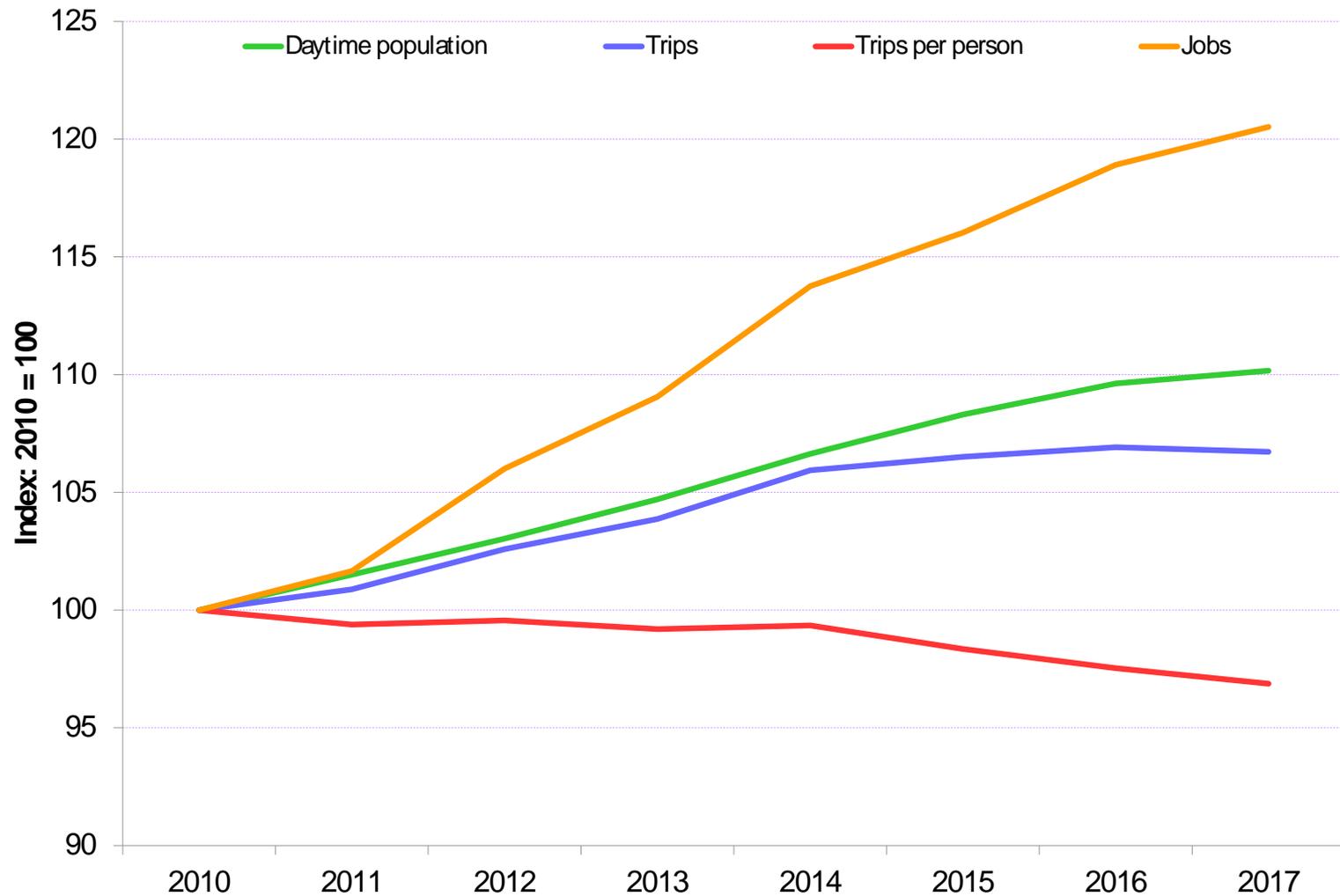
There is evidence of a slowdown in the growth of London's working age population



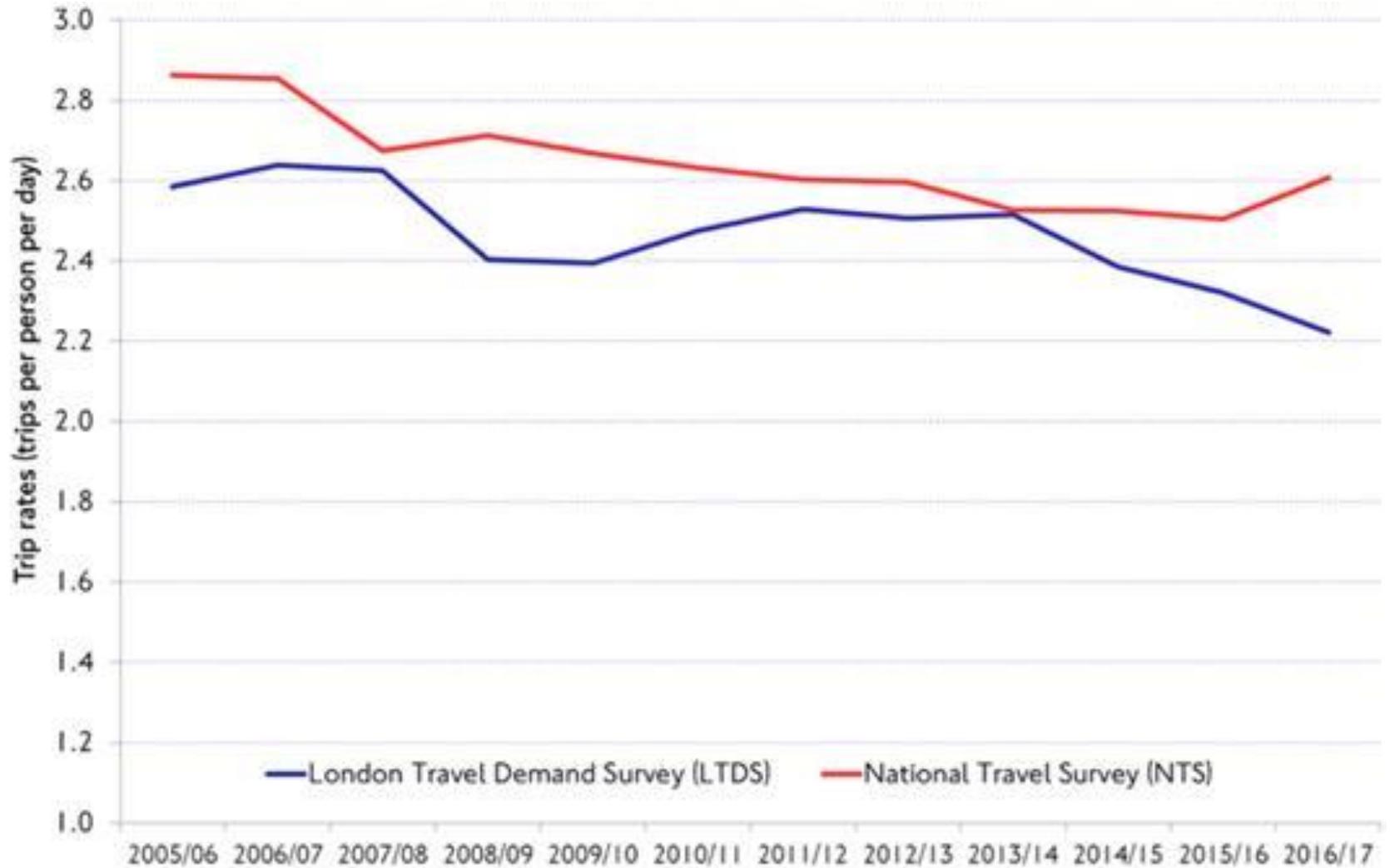
In 2017, total net migration fell to below zero, due to continued decline in international migration and an increase in domestic out-migration



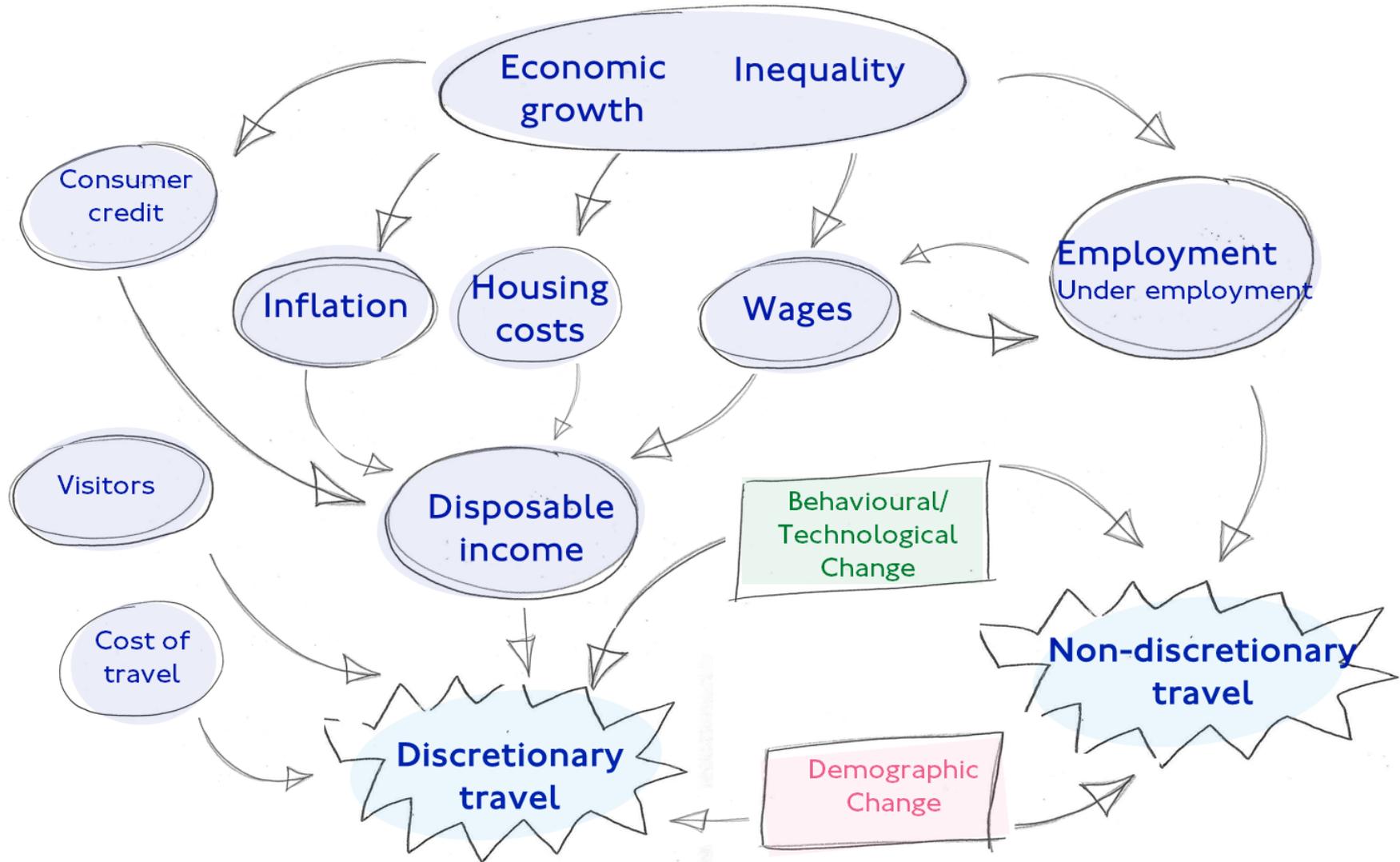
Relationship between population, jobs and trips in London



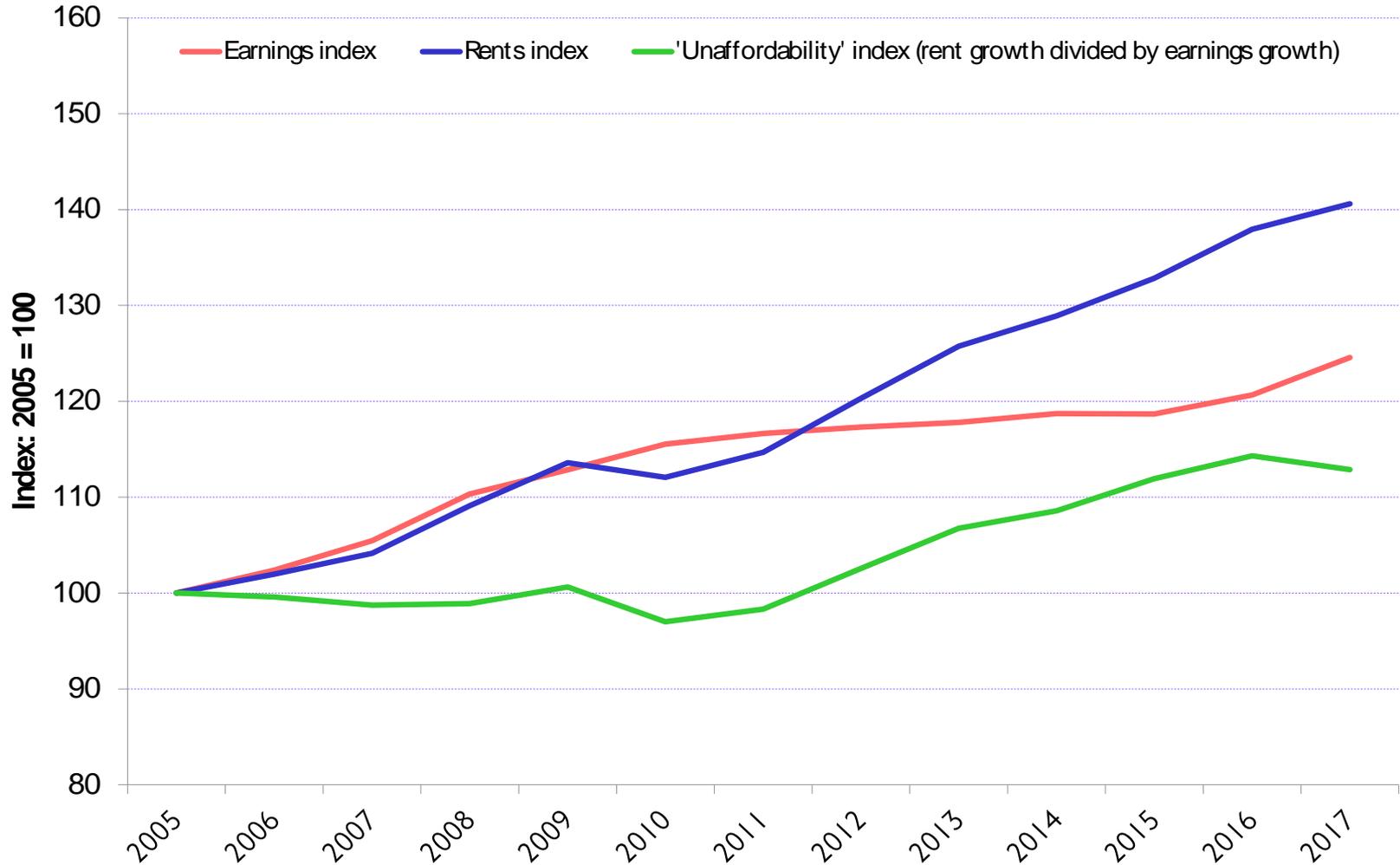
Declining trip rates



Personal disposable income affects the demand for discretionary travel

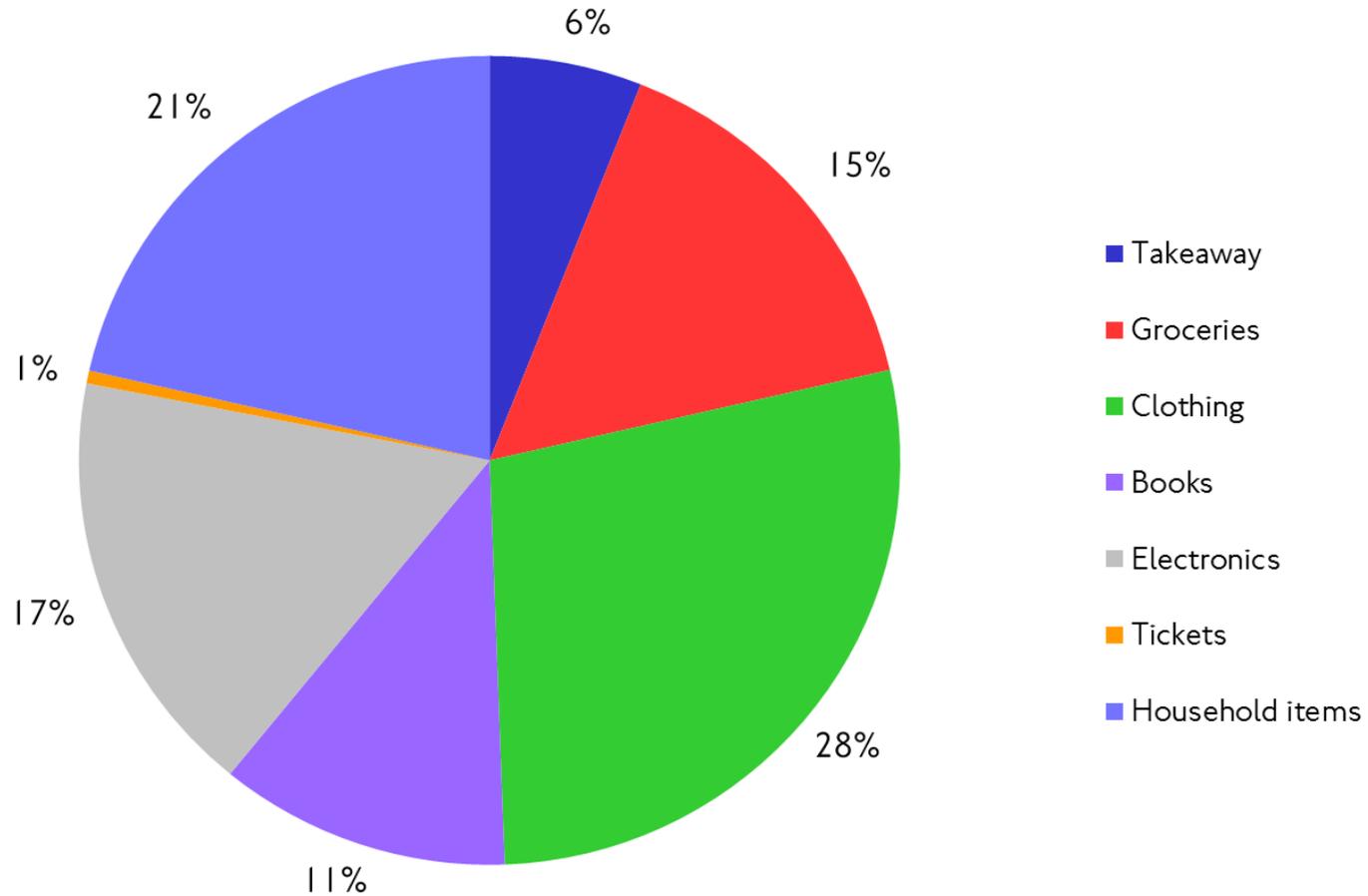


Living costs have been increasing - especially London's housing costs

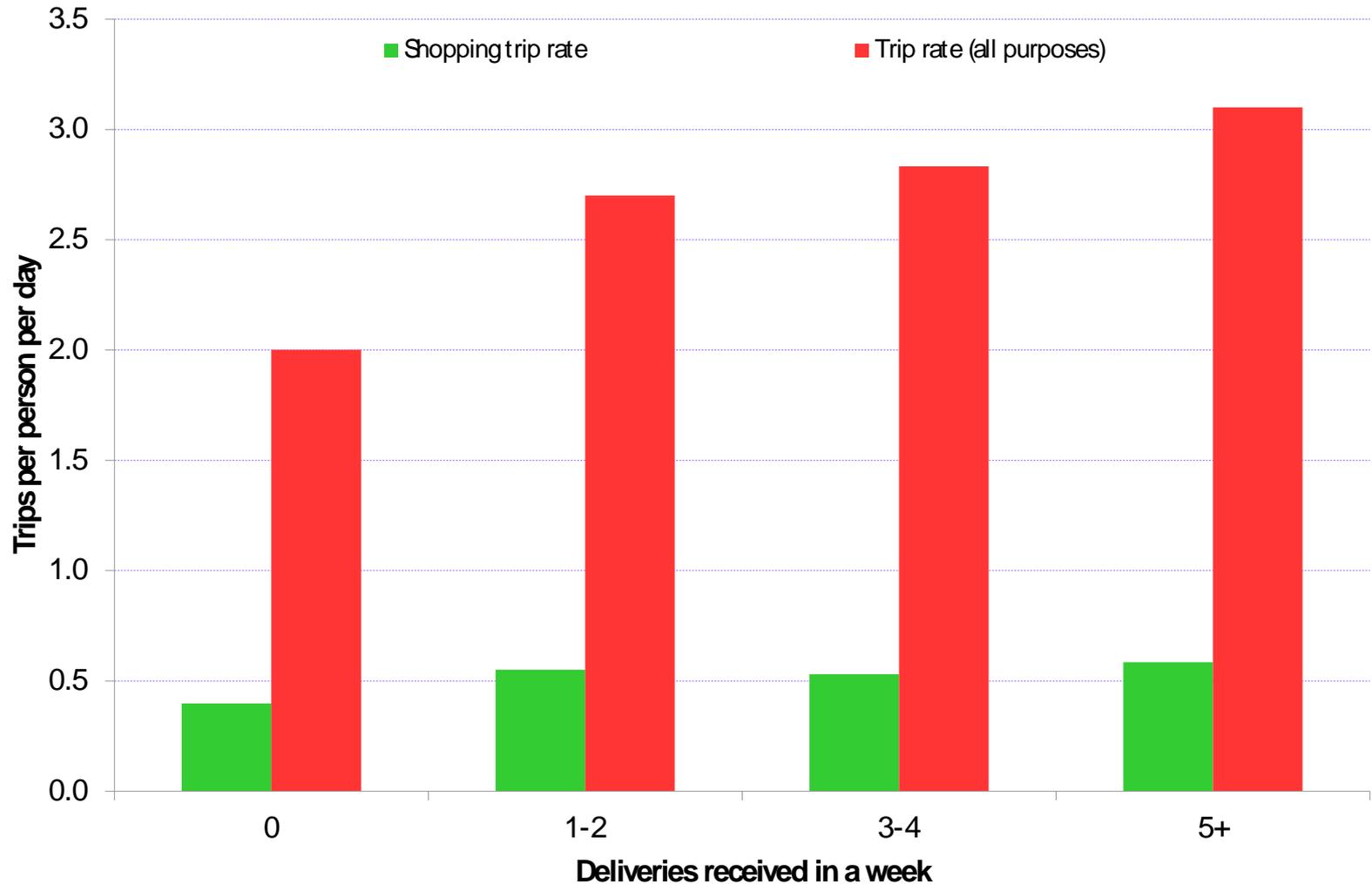


Source: GLA Housing in London.

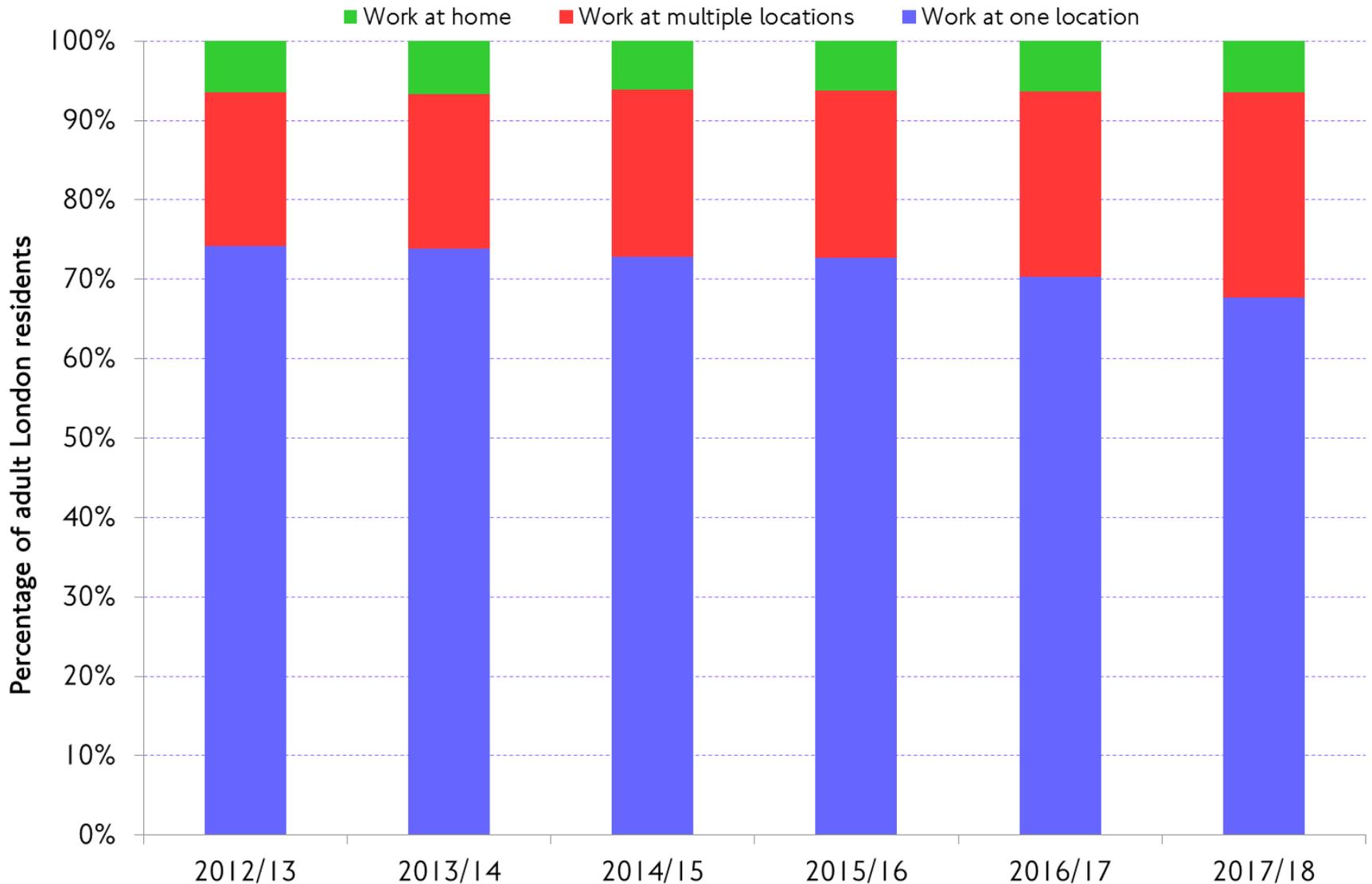
22 per cent of London residents receive at least one delivery per week for items purchased online



But people who receive most deliveries also go shopping more



The proportion of London residents who travel to the same workplace every day is declining



What's coming up?

- Major new surveys of pedestrian density and the health of London's streets.
- Further work to better understand potential changes to travel behaviour.
- Developing better protocols for communicating outcomes of cycle monitoring.



Thank you

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