MAYOR OF LONDON

TRANSPORT FOR LONDON
EVERY JOURNEY MATTERS

Agenda

Meeting: Customer Service and Operational Performance Panel

Date: Wednesday 22 March 2023

Time: 10:30am

Place: Conference Rooms 1 and 2, Ground Floor, Palestra, 197 Blackfriars Road, London, SE1 8NJ

Members

Dr Mee Ling Ng OBE (Chair)
Marie Pye (Vice-Chair)
Bronwen Handyside
Anne McMeel
Dr Lynn Sloman MBE
Peter Strachan
Cllr Kieron Williams

Copies of the papers and any attachments are available on tfl.gov.uk How We Are Governed.

This meeting will be open to the public and webcast live on TfL YouTube channel, except for where exempt information is being discussed as noted on the agenda.

There is access for disabled people and induction loops are available. A guide for the press and public on attending and reporting meetings of local government bodies, including the use of film, photography, social media and other means is available on www.london.gov.uk/sites/default/files/Openness-in-Meetings.pdf.

Further Information

If you have questions, would like further information about the meeting or require special facilities please contact:Zoe Manzoor, Secretariat Officer;
Email: v_ZoeManzoor@tfl.gov.uk.

For media enquiries please contact the TfL Press Office; telephone: 0343 222 4141; email: PressOffice@tfl.gov.uk

Howard Carter, General Counsel
Tuesday 14 March 2023

Agenda
Customer Service and Operational Performance Panel
Wednesday 22 March 2023

1 Apologies for Absence and Chair's Announcements

2 Declarations of Interest

General Counsel

Members are reminded that any interests in any matter under discussion must be declared at the start of the meeting, or at the commencement of the item of business.

Members must not take part in any discussion or decision on such matter and, depending on the nature of the interest, may be asked to leave the room during the discussion.

3 Minutes of the Meeting of the Panel held on 6 December 2022
(Pages 1 - 8)

General Counsel

The Panel is asked to approve the minutes of the meeting of the Panel held on 6 December 2022 and authorise the Chair to sign them.

4 Matters Arising and Actions List (Pages 9 - 18)

General Counsel

The Panel is asked to note the updated actions list.

5 Customer Service and Operational Performance Report - Quarter 3 2022/23 (Pages 19 - 58)

Chief Operating Officer and Chief Customer and Strategy Officer

The Panel is asked to note the paper.

6 Electrified Travel Devices (Micromobility) (Pages 59 - 66)

Chief Customer and Strategy Officer

The Panel is asked to note the update.

7 TfL International Benchmarking Report 2023 (Pages 67 - 96)

Chief Customer and Strategy Officer

The Panel is asked to note the paper.

8 Bus Action Plan Update (Pages 97 - 106)

Chief Operating Officer

The Panel is asked to note the paper.

9 Members' Suggestions for Future Discussion Items (Pages 107 - 110)

General Counsel

The Panel is asked to note the forward plan and is invited to raise any suggestions for future discussion items for the forward plan and for informal briefings.

10 Any Other Business the Chair Considers Urgent

The Chair will state the reason for urgency of any item taken.

11 Date of Next Meeting

Wednesday 12 July 2023 10:30am

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Transport for London

Minutes of the Customer Service and Operational Performance Panel Meeting

Conference Rooms 1 and 2, Ground Floor, Palestra, 197 Blackfriars Road, London, SE1 8NJ
10:00 Tuesday 6 December 2022

Members
Dr Mee Ling Ng OBE (Chair)
Marie Pye (Vice-Chair)
Anne McMeel
Dr Lynn Sloman MBE (via Teams)
Peter Strachan

Executive Committee

Howard Carter	General Counsel (via Teams)
Glynn Barton	Interim Chief Operating Officer
Alex Williams	Chief Customer and Strategy Officer

Other staff

Monica Cooney	Head of Control Centre Operations
Carl Eddleston	Director of Network Management & Resilience
Mark Evers	Chief Customer Officer
Siwan Hayward	Director of Security, Policing and Enforcement
Zoe Manzoor	Senior Committee Officer
Mandy McGregor	Head of Transport Policing and Community Safety
James Mead	General Manager, On-Demand Transport for London
Amanda Price	Head of Secretariat Operations
Claude Snowdon	Noise Vibration & Air Quality Lead
Duncan Weir	Head of Track Maintenance & Renewals
Imogen Wescott	Head of Assisted Travel (via Teams)

Also in attendance

Paul Furnell	Chief Superintendent British Transport Police (BTP)

34/12/22 Apologies for Absence and Chair's Announcements

An apology for absence had been received from Bronwen Handyside. Dr Lynn Sloman MBE was attending via Teams and was able to participate in the discussions but was not counted toward the quorum. The meeting was quorate.

The Chair welcomed everyone to the meeting. The meeting was being broadcast live on YouTube, to ensure the public and press could observe the proceedings.

The Deputy Chair of TfL has agreed to appoint Cllr Kieron Williams to the Panel. The appointment was too close to this meeting for him to alter existing commitments so his first meeting as a Member of the Panel would be from the next meeting.

The Chair reminded those present that safety was paramount at TfL and encouraged Members to raise any safety issues during discussions on a relevant item or with TfL staff after the meeting.

35/12/22 Declarations of Interest

All Members confirmed that their declarations of interests, as published on tfl.gov.uk, were up to date and there were no additional interests to declare that related specifically to items on the agenda.

36/12/22 Minutes of the Meeting of the Panel held on 4 October 2022

The minutes of the meeting of the Panel held on 4 October 2022 were approved as a correct record and the Chair was authorised to sign them.

37/12/22 Matters Arising and Actions List

Howard Carter introduced the item.

It was confirmed that the update on the timing of a decision on making recent changes to Freedom Passes permanent (Action 28/10/22 (7)) would be provided to all Members of the Panel.

A briefing for all Members on the Action for Inclusion Programme (Action 34/10/21) would be arranged ahead of its publication, which was now scheduled for the first half of 2023.

The Panel noted the Actions List.

38/12/22 Customer Services and Operational Performance Report - Quarter 2 2022/23

Alex Williams, Glynn Barton and Mark Evers introduced the paper, which provided the quarterly Customer Service and Operational Performance report for Quarter 2, 2022/23 (covering 26 June 2022 to 17 September 2022). The dominant issues were Operation London Bridge, which was the subject of a separate report on the agenda, and the problems caused by excessive heat in the summer months.

Passenger numbers had continued to recover over the quarter for most modes of transport. TfL was working to increase ridership levels further. Numbers were slightly down and below budget for bus journeys, impacted by driver shortages, which was an industry-wide problem. Work was ongoing to address this, and overall bus journey numbers remained on target for the whole year.

The update on London Underground showed that service levels had fallen slightly below target, due both to heat issues and to fleet availability on the Jubilee line. Good progress was being made on initiatives to address this. On London Overground, performance remained slightly below target for the quarter, but remained on target for the whole year. Tram performance had slightly missed its target, although there had been significant improvements over the quarter. Action continued to be taken to address the fleet issues to bring the service up to capacity.

The Panel would receive a more detailed update on Overground performance (including the work with Network Rail) and fleet availability on the London Underground, with an option to visit the Jubilee line depot.

[Action: Glynn Barton]

The customer care score remained broadly stable, but below target. It was around the 50 per cent mark and was broadly in line with performance levels before the coronavirus pandemic.

TfL had completed two major consultations, on Central London Bus Services and on Road User Charging. In response to a question, Alex Williams would provide the Panel with details of the changes to the 184 bus service in Barnet.

[Action: Alex Williams]

The paper also set out progress on traffic signal time savings. The team reviewed these on a regular basis to reduce times, with a particular focus on pedestrians, cyclists and buses. Work was also targeted at certain priority areas. Officers were aware of the innovative work and good practice in this area in other cities and were exploring how lessons learnt from these could be applied in London.

An update would be provided to the Panel on reasons behind the rise in taxi and private hire driver complaints. **[Action: Howard Carter]**

The Panel discussed the approach to gathering data in order to better understand the key drivers of performance scores, especially in the areas where there had been a continuing decline in performance. Officers confirmed that, for the past 10 years, they had monitored the customer care score, looking at a range of sources and engaged in several initiatives to identify key themes and draw conclusions about the trends. The Panel suggested that the report should read ‘strongly suspect’, where the findings were insufficiently backed up by evidence.

The Panel welcomed the commendations and the work carried out on abuse against staff. TfL take this very seriously.

Appendix 1 to the report, the six-month Crime and Anti-Social Behaviour Report, which had been omitted from the papers in error, would be circulated to Members and published on the website after the meeting. **[Action: Secretariat]**

The Panel noted the paper.

39/12/22 Deep-dive on TfL's "Care score"

Mark Evers introduce this item. At its meeting on 4 October 2022, the Panel requested more detailed information on the drivers of the care score, the differences in perceptions of Care, and how the data is used alongside other customer insight to guide work and make improvements. The research covered all Londoners not just TfL customers.

The presentation focused on the long-term trends in the customer care score, showing this had peaked in certain periods where appreciation levels were particularly high. For example, during 2012–2015 and then during the coronavirus pandemic. Since then, the score had remained broadly stable at a mid-range level.

The presentation also covered the key drivers of customer care over time and the factors that often influence this. Some of these were outside of TfL's control. The presentation highlighted the critical importance of the measure 'TfL supports customers when things go wrong'. It was thought that this has a significant impact on how customers perceive the service. TfL would continue to focus on this area and improving this score, in particular, the score for customers with greater accessibility needs.

The care metric formed part of a suite of measures to improve the customer experience that were used in connection with one another.

Work was underway to understand further the perceptions of care amongst different groups, especially the score amongst females, customers with greater access needs, and the C2DE groups, where the care scores were generally lower. While it was noted that safety concerns were an issue for females, it was also recognised that there were other matters that needed to be addressed to make sure that TfL was better able to meet the needs of all of its users and remove barriers for certain groups.

TfL directly engaged with customers and stakeholders, to better understand accessibility issues and improve services, and to identify where focus needed to be placed. Equality Impact Assessments were carried out to ensure services met standards.

To gain a greater insight to the care score, Members would receive monitoring information on the difference in customer care scores by key metrics: gender, age, different social economic classes, residents living in inner and outer London, bus and Tube users and non-bus and non-Tube users, TfL customers and Londoners who are not customers of TfL services. Officers would also look into how frequently this information should be reported back to the Panel.

More detailed information should be included in the quarterly report on care scores and an annual deep dive should be carried out with a view to looking at ways of increasing customer care scores. **[Action: Mark Evers]**

The Panel sought clarity on the approach to identifying the underlying reasons behind the care scores. Officers confirmed that they looked at a range of issues, when seeking to identify underlying reasons for the trends. Officers expressed an intention to explore further ways of gathering quantitative evidence. The Panel felt that the report should read 'strongly suspect', where the findings were insufficiently backed up by evidence.

Mark Evers would share with the Panel benchmarking data regarding customer care scores compared with other organisations.

The list of key drivers of care over time would also include value for money.
[Action: Mark Evers]

An update on the review of the customer care score metrics would be brought to the Panel in due course. **[Action: Alex Williams/Secretariat]**

The Panel noted the paper.

40/12/22 Assisted Transport Services Update

Imogen Wescott and James Mead presented this item. The paper provided an update on the work carried out to progress the Assisted Transport Services (ATS) Strategy since the last update to the Panel on 13 July 2022.

The paper highlighted a number of developments, covering: the growth in the demand for Dial-a-Ride services; the recruitment of new drivers to meet demand; and the travel mentoring services. The paper also covered the work to refresh the ATS roadmap, highlighting the inclusion of new objectives and future projects. The refreshed ATS Strategy and roadmap was attached to the report.

A supplier has been selected to provide the booking and scheduling system. They have a significant amount of experience and have started planning for the transition. They are due to start operating services in December 2023. It was envisaged that improvements in this area, such as the provision of a self-service portal, should free up time to allow staff to assist customers with transport choices and provide the most appropriate journey.

ATS carried out benchmarking and, through tools such as the website, provided clear information about the service in order to clarify service options. The service is also working with London Councils, regarding the eligibility criteria for Taxicards, with a view to harmonising the service. Members supported this work.

The Panel discussed the current pressures on the entire community transport services and the increase in demand on the ATS from changes in this sector. It was suggested that this matter should be raised with London Councils in addition to the issue of harmonising the eligibility criteria for Taxicards. Future reports to the Panel would include information on these matters.

[Action: Imogen Wescott/James Mead]

The Head of Assisted Travel also expressed an interest in working with the Chief Customer Officers' team to collect data on the use of the transport network, as a whole, by customers with greater access needs, in order to gain a deeper insight into the 'bigger picture'.

The Panel looked forward to receiving the refreshed roadmap and more information on the issues being worked on.

The Panel noted the paper.

41/12/22 Operation London Bridge

Glynn Barton, Carl Eddleston and Monica Cooney presented the item. The paper provided an update on how TfL managed Operation London Bridge, following the death of Her Majesty Queen Elizabeth II. Some of the key achievements highlighted included the significant amount of work that went into to planning and responding to the event, and the engagement in debriefs in order to identify lessons learnt.

The response was an astonishing effort by everyone involved. The Panel and Officers were immensely proud of TfL's achievements during this challenging time.

It was acknowledged that TfL must now retain the corporate memory of the event, and apply the lessons that had emerged from the experience around, for example, planning readiness and bolstering the numbers of critical staff given their importance to major events. It was confirmed that TfL had or were in the process of embedding the lessons learnt from the event for future large-scale events.

The Panel noted the paper.

42/12/22 Tube Noise

Duncan Weir and Claude Snowdon presented the item. At its meeting on 4 October 2022, the Panel requested more detailed information on Tube noise and mitigations, particularly the impact of short range 'screeching noise' in Tube journeys, given the impacts on the customer experience.

The presentation covered a range of issues including the causes (such as corrugation on rails and issues relating to the condition and design of the infrastructure). It also covered the challenges TfL face dealing with noise complaints, the mitigations and the work to monitor hotspots.

To address the issues, TfL are exploring a number of solutions, including trialling a new product (Delkor) and have also engaged in rail grinding, at a cost, to minimise residential, and "in Tube" noise. The merits of the potential solutions will be carefully evaluated, with the aim of making an informed choice on the best alternative to the current system, to manage both types of disturbance effectively. The Panel noted details of the outcome of the testing of the alternative engineering solutions.

TfL had a process in place to identify hot spots, and to monitor problems. Work was also underway to develop measures to ensure noise levels for staff working underground met appropriate standards.

The Panel noted the paper.

43/12/22 Customer Safety and Security

Siwan Hayward and Mandy McGregor, along with Paul Furnell of the British Transport Police (BTP) provided an update on work to improve the safety of women and girls while travelling in London.

Paul Furnell reported on the partnership working with BTP, highlighting the key initiatives which had been very successful such as: zero tolerance sexual harassment campaign; the measures to encourage bystander intervention in a safe way; and the work to facilitate reporting to identify perpetrators.

Good progress had also been made with initiatives aimed at ending domestic violence and promoting the White Ribbon Initiative. TfL worked closely with the Metropolitan Police, London boroughs and with Roads and Transport Policing Command on initiatives in relation to improving the safety of women and girls on the street, as it was noted that offences often happened outside stations. TfL also worked in partnership with stakeholders, including the Mayor's Office for Policing and Crime, on initiatives.

The Panel highlighted the issue of safe taxi and private hire vehicles use. TfL supported the Safer Travel at Night (STaN) campaign. STaN aims to reduce the number of cab-related sexual offences. As part of this initiative, campaigns were run at key points in the year in addition to other interventions. Other key initiatives included work to introduce safeguarding measures, through the Department for Transport's consultation on statutory taxi and private hire standards, and measures to facilitate third party reporting of offences. TfL would be reporting annual statistics on sexual offences against taxi and private hire drivers in early next year, and this would be brought to the Panel**.** **[Action: Siwan Hayward/Secretariat]**

The feedback indicated that the programme has been well received and that the campaign was meeting its objectives. It was important to ensure that bystanders felt safe when reporting incidences.

The Panel noted the paper.

44/12/22 Members' Suggestions for Future Discussion Items

Howard Carter introduced the forward plan. No additional suggestions were raised for future discussion items on the forward plan or for informal briefings, other than those already noted during the meeting.

The Panel noted the paper.

45/12/22 Any Other Business the Chair Considers Urgent

There was no other urgent business to discuss.

46/12/22 Date of Next Meeting

The next scheduled meeting of the Panel would be held on 22 March 2023 at 10.00am.

The meeting finished at 1:20pm.

Chair: _____

Date: _____

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Customer Service and Operational Performance Panel

Date: **22 March 2023**

Item: **Matters Arising and Actions List**

This paper will be considered in public

1 Summary

1.1 This paper informs the Panel of progress against actions agreed at previous meetings.

2 Recommendation

2.1 The Panel is asked to note the Actions List.

List of appendices to this report:

Appendix 1: Actions List

List of Background Papers:

Minutes of previous meetings of the Customer Service and Operational Performance Panel

Contact Officer: Howard Carter, General Counsel
Email: HowardCarter@tfl.gov.uk

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Customer Service and Operational Performance Panel Actions List **Appendix 1**
(Reported to the meeting on 22 March 2023)

Actions from the meeting held on 6 December 2022

Minute no.	Item/Description	Action by	Target Date	Status Note
38/12/22 (1)	**Quarterly Customer Services and Operational Performance Report - Quarter 2 2022/23. Overground performance and fleet reliability.** The Panel would receive a more detailed update Overground performance, (including the work with Network Rail), and fleet availability on the London Underground, with an option to visit the Jubilee line depot.	Glynn Barton	March 2023	**Completed.** An update on Overground performance is provided within the quarterly performance report. A site visit to the Jubilee line depot is scheduled for 14 March 2023.
38/12/22 (2)	**Quarterly Customer Services and Operational Performance Report - Quarter 2 2022/23: Bus Service 184**. Alex Williams would provide the Panel with details of the changes to the 184 bus service in Barnet.	Alex Williams	January 2023	**Completed.** An update was sent to Panel members (on 10 January 2023) confirming the frequency of route 184 was reduced (in October 2022) from seven buses per hour (bph) Monday to Saturday daytimes to six bph, with no change to the additional school day-only journeys or on Sundays.

38/12/22 (3)	**Quarterly Customer Services and Operational Performance Report - Quarter 2 2022/23: Taxi and Private Hire complaints** An update would be provided to the Panel on reasons behind the rise in taxi and private hire driver complaints.	Howard Carter	March 2023	**In Progress.** The Licensing and Regulation Team are in the process of providing a written update for the Panel.
38/12/22 (4)	**Quarterly Customer Services and Operational Performance Report - Quarter 2 2022/23: Appendix 1** Appendix 1 to the report, the six-month Crime and Anti-Social Behaviour Report, which had been omitted from the papers in error, would be circulated to Members and published on the website after the meeting.	Secretariat	December 2022	**Completed.** Published on the Panel's agenda webpages on 7 December 2022.

39/12/22 (1)	**Deep-dive on TfL's "Care score" Future report** More detailed information should be included in the quarterly report on care scores and an annual deep dive should be carried out with a view to looking at ways of increasing customer care scores.	Mark Evers	July 2023	A paper on the 2022/23 Deep Dive is on the Forward plan for the July 2023 meeting.
39/12/22 (2)	**Deep-dive on TfL's "Care score": Benchmarking** Mark Evers would share with the Panel, benchmarking data regarding customer care scores compared with other organisations.	Mark Evers	March 2023	**In Progress.** An update is being prepared and will be available shortly.
39/12/22 (3)	**Deep-dive on TfL's "Care score** An update on the review of the customer care score metrics, which would include Value for Money, would be brought to the Panel in due course.	Alex Williams	July 2023	See action 39/12/22 (1) above
40/12/22	**Assisted Transport Services Update:** The Panel discussed the current pressures on the entire community transport services and the increase in	Imogen Wescott/James Mead	July 2023	A paper is on the Forward plan for the July 2023 meeting.

	demand on the ATS from changes in this sector. It was suggested that this matter should be raised with London Councils in addition to the issue of harmonising the eligibility criteria for Taxicards. Future reports should include information on these matters when next reported to the Panel.			
43/12/22	**Customer Safety and Security: Statistics** TfL would be reporting annual statistics on sexual offences against taxi and private hire drivers in early next year, and this would be brought to the Panel.	Siwan Hayward / Secretariat	February 2022	**Completed.** This matter falls within the remit of the Safety, Sustainability and Human Resources Panel, which received a briefing in February 2023 to which all Board members were invited. The statistics will be published later in 2023.

Actions from Previous meetings

28/10/22 (7)	**Customer Services and Operational Performance Report - Quarter 1, 2022/23: Freedom Pass** Initial consideration had been given to the merits of making recent Freedom Pass changes permanent, following the introduction of these changes in summer 2020 on a temporary basis. Alex Williams would provide the Panel with details of the timing of the decision on this and how this will be communicated to customers.	Alex Williams	February 2023	**Completed.** An update was reported to TfL Board on 1 February 2023 in relation to Mayoral Direction (MD3014), which made permanent revisions to the Older Persons' Freedom Pass and the 60+ London Oyster photocard from 18 January 2023. The change did not affect holders of the Disabled Persons' Freedom Pass on either TfL or National Rail services, where current acceptance would continue unchanged.
28/10/22 (8)	**Customer Services and Operational Performance Report - Quarter 1, 2022/23: Ridership** TfL was exploring the impact of new working patterns on ridership, including gathering information from stakeholders, which will help inform future campaigns. An update would be provided to the Panel in due course.	Alex Williams	March 2023	**Completed.** Updates on ridership and trends will continue to be provided as part of the Quarterly Customer Service and Operational Performance Report.

18/07/22	**Customer Safety and Security Update: chronic fare evasion** Siwan Hayward confirmed that there was a strong link between offenders of chronic fare evasion and wider criminality on the network. Chronic fare evaders were blatant and regarded as an anti-social behaviour issue. Sanctions were aimed at denying them use of the network entirely, not just penalty for unpaid fares. A pen portrait summary of chronic fare evaders and offender management profiles showing the overlap of behaviours, including the statistics on links with work-related violence, would be brought back to the meeting of the Panel in December 2022.	Siwan Hayward	July 2023	A paper is on the Panel's Forward plan for the July 2023 meeting.
05/03/22 (2)	**Customer Services and Operational Performance Report – Quarter 3, 2021/22: Bus Action Plan** A paper on the Bus Action Plan would be submitted to a future meeting of the Panel.	Louise Cheeseman	March 2023	**Completed.** A paper is on the agenda.

05/03/22 (5)	**Customer Services and Operational Performance Report – Quarter 3, 2021/22: electrified travel** Members requested a paper at a future meeting on TfL's strategy on electrified travel, such as e-scooters.	Alex Williams	March 2023	**Completed.** A paper is on the agenda.
32/10/21	**Bus Services to London's Hospitals: modal shift survey** At an appropriate time in the future, TfL would look to conduct a more structured survey to determine whether improved bus links had caused a modal shift. Analysis would be shared at a future meeting of the Panel.	Bob Blitz	October 2023	Bus services to hospitals are being considered as part of the consultation on wider changes to bus services. An update on the outcome of that consultation will be brought to a future meeting.
33/10/21	**Winning Back Our Customers: key areas of focus** Nine key, top-level areas of focus had been identified to encourage customers back to the public transport network. Further information on these would be presented at future meetings of the Panel and, where possible, would include differences between inner and outer London.	Alex Williams	July 2023	Updates on progress are included in the Quarterly Customer Service and Operational Performance Report. From Quarter 1, 2023/24 this will include differences between inner and outer London.

34/10/21	**Enterprise Risk Update – Disparity Leading to Unequal or Unfair Outcomes (ER11): Inclusion Programme briefing** A briefing for all Members on the Action for Inclusion Programme would be arranged ahead of its publication, which was scheduled for the first half of 2023.	Julie Dixon	March 2023	A briefing has been arranged for the Board.

Customer Service and Operational Performance Panel

Date: **22 March 2023**

Item: **Customer Service and Operational Performance Report - Quarter 3, 2022/23**

This paper will be considered in public

1 Summary

1.1 The purpose of this paper is to update the Panel on TfL's customer service and operational performance for Quarter 3 2022/23, which is appended in the format of a report.

1.2 This report covers the period from 18 September – 10 December 2022.

2 Recommendation

2.1 The Panel is asked to note the paper.

List of appendices to this report:

Appendix 1: Customer Service and Operational Performance Report, Quarter 3 2022/23

List of Background Papers:

None

Contact Officer: Glynn Barton, Chief Operating Officer
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Appendix 1

Customer service and operational performance report

Quarter 3 2022/23 (18 September – 10 December 2022)

MAYOR OF LONDON

TRANSPORT FOR LONDON
EVERY JOURNEY MATTERS

Contents

We're committed to enabling more active travel

Introduction

Our operational performance and customer service in the third quarter of 2022/23

We put customers at the heart of everything we do. We are committed to listening to them and are focused on tracking their most common day-to-day frustrations to improve their journeys and inform the areas where we focus our future investment. Our customers expect us to provide a safe and reliable transport network that offers value for money and promotes innovation.

Despite the cost of living crisis and strike action across National Rail and our network, demand is returning towards pre-pandemic levels and passenger confidence in travelling on public transport is high.

We are proud that the Elizabeth line is showing how sustainable and affordable transport can drive the city's economic growth and recovery. This quarter saw improvements to the Elizabeth line with trains running directly from Reading and Heathrow to Abbey Wood, and from Shenfield to Paddington. The new Bond Street Elizabeth line station also opened in November, giving another boost to London's recovery from the pandemic.

We are committed to enabling more people to walk, cycle and use public transport. This is a vital part of building a healthier and more sustainable capital for everyone.

Glynn Barton
Chief Operating Officer

Alex Williams
Chief Customer and Strategy Officer

Measures used in this report

How we monitor and record our progress

Throughout this report, we use different metrics to analyse the performance of each mode of transport to ensure we have a suitable comparison and can clearly monitor progress and performance. This page provides an overview of these key measures.

Average bus speed
This includes the time buses spend stationary at bus stops.

Bus journey time
This is the overall time a customer must allow to complete a journey on our high-frequency bus routes. It includes wait time, in-vehicle time, interchange, crowding and buffer time, and is weighted by customer demand and the perceived value of the customer's time to measure the overall experience.

Care score
This is the percentage of Londoners who agree strongly or agree slightly that we care about our customers. It measures how well we consistently meet people's expectations, during both journey and non-journey interactions with us. It is measured for TfL as a whole, as well as London Underground and London Buses.

Customer satisfaction
The quality of service is measured using an 11-point scale, from 10 (extremely satisfied) to 0 (extremely dissatisfied). We use an index to ensure results are straightforward and can be compared among themselves and over time. To calculate this index, the mean scores of the ratings are shown as whole numbers out of 100. For example, a mean score of 6.62 becomes a customer satisfaction rating of 66.

DLR departures
The percentage of scheduled trains that completed their end-to-end journey.

Elizabeth line public performance measure
TfL Rail became the Elizabeth line when the service opened on 24 May 2022. This measure shows the percentage of trains that arrive at their final destination on time, combining figures for punctuality and reliability into a single measure, as is the rail industry standard.

It measures the performance of individual trains advertised as passenger services against their planned timetable, as agreed between the operator and Network Rail at 22:00 the night before the journey. It is therefore the percentage of trains arriving on time compared with the total number of trains planned.

In London and the South East, a train is defined as being on time if it arrives within four minutes 59 seconds of the planned arrival time. Where a train does not call at all timetabled stations, it will count as a public performance measure failure.

IFS Cloud Cable Car and Woolwich Ferry availability
The London Cable Car is sponsored by technology company IFS for a minimum of two years and is called the IFS Cloud Cable Car. The two cable car terminals have been renamed IFS Cloud Greenwich Peninsula and IFS Cloud Royal Docks. The rebranding from the previous sponsor completed in October 2022. This measure shows the scheduled hours/minutes minus the time when these services are closed to passengers, as a percentage of the scheduled hours/minutes.

London Overground time to three
The percentage of recorded station stops arrived at early, or less than three minutes after the scheduled time. This is different from the public performance measure, which measures the punctuality of trains at their final destination only.

This measure excludes station stops where the train fails to call. For the public performance measure, all cancelled trains are included and counted as non-punctual trains.

Mission Critical Severity I incidents
Services needed to deliver vital operations, whereby disruptions could cause significant damage or serious impact to us. This includes reputational and financial damage.

Passenger journeys compared to pre-coronavirus pandemic levels
Comparing demand for 2022/23 against 2018/19 levels.

Road disruption
This measures delays by comparing vehicle journey times to the same quarter in 2019/20, expressed as a percentage of the baseline figure. This is to ensure that unplanned disruption and planned works and events are managed effectively.

Tracking road disruption remains important for us to meet our duties under the Traffic Management Act, and our obligations as a strategic traffic authority. This measure only covers our roads.

Santander Cycles docking station availability
The percentage of time that docking stations are not empty or full of cycles.

Scheduled services operated

London Underground
The percentage of scheduled services we operate.

London Buses
The proportion of planned in-service mileage that has been provided for passengers. Operated mileage may be less than planned mileage, owing to staffing, mechanical or congestion issues.

Dial-a-Ride
The proportion of journey requests the on-demand team could fulfil.

London Trams
The percentage of services operated compared with the scheduled timetable.

Traffic signal time savings
This measure is for pedestrians, cyclists and bus users at traffic lights. This is measured by conducting a 'before' and 'after' comparison of journey and wait times through each reviewed junction. The absolute time changes, positive and negative, are multiplied by estimates of the number of people using each set of reviewed signals on each mode of transport.

This measurement does not take place during abnormal periods of road use, such as school and bank holidays, or if planned and unplanned events and roadworks are happening nearby.

Our scorecard

Measuring the reliability of our services and the progress of London's recovery

Our scorecard for 2022/23 continues to focus on the recovery of the organisation, and the capital, from the coronavirus pandemic. Scrutiny of our performance against these measures is the responsibility of the TfL Board's Customer Service and Operational Performance Panel.

In the Operations section, passenger journeys set the context for the metrics that follow. We have structured this section by metric rather than by operational area to provide a more thematic approach, which reflects the scorecard.

For operational areas not included on the scorecard, we have included the metric used at an operating business level to provide appropriate insight.

Measure	2022/23 Year-to-date actual	2022/23 Year-to-date target	2022/23 Full-year forecast	2022/23 Full-year target
Operations				
Passenger journeys – London Underground, Buses, London Overground, Trams, DLR, Elizabeth line (millions)	2,250.86	2,246.13	3,258	3,248
Bus journey time (minutes)	33.7	33.5	33.6	33.5
London Underground trips operated against schedule (%)	90.0	90.0	90.1	90
Customer				
TfL cares about its customers (%)	54	57	54	57

Scorecard measures
In this report, scorecard measures are marked with this symbol.

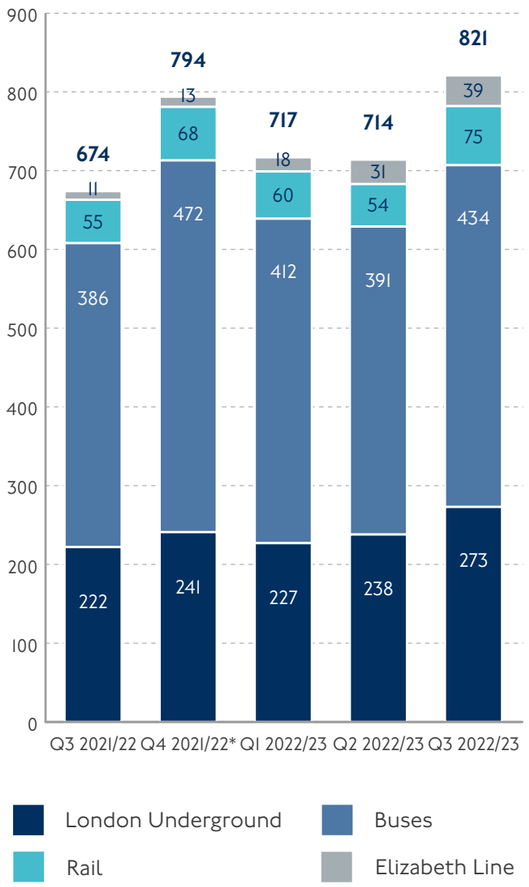
Operations

Providing safe, clean and reliable services to support the recovery

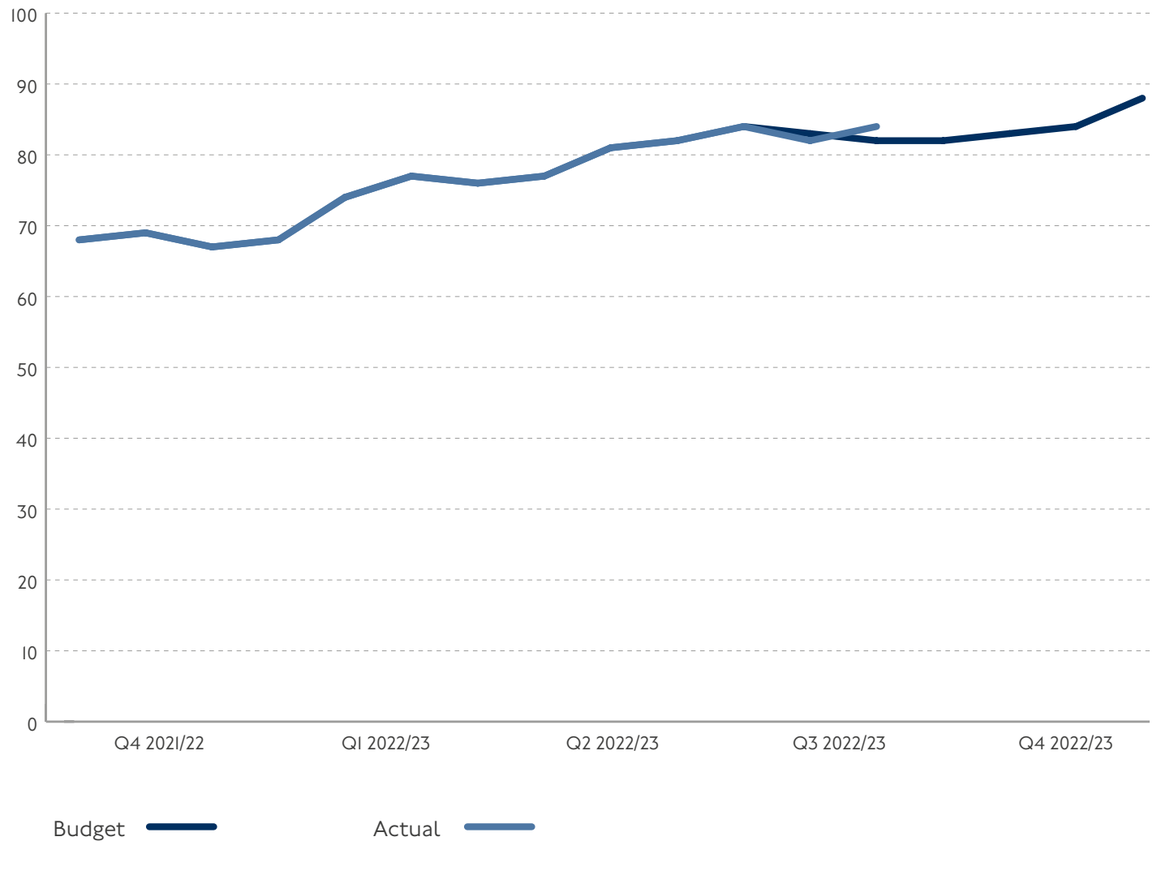
Passenger journeys

Passenger journeys across the network continue to increase, as we see demand returning towards pre-coronavirus pandemic levels. We have seen strong growth in demand this quarter despite several days of industrial action, which had relatively small impact on journeys across our network.

Passenger journeys*
Past five quarters (millions)



Compared with pre-coronavirus baseline (%)



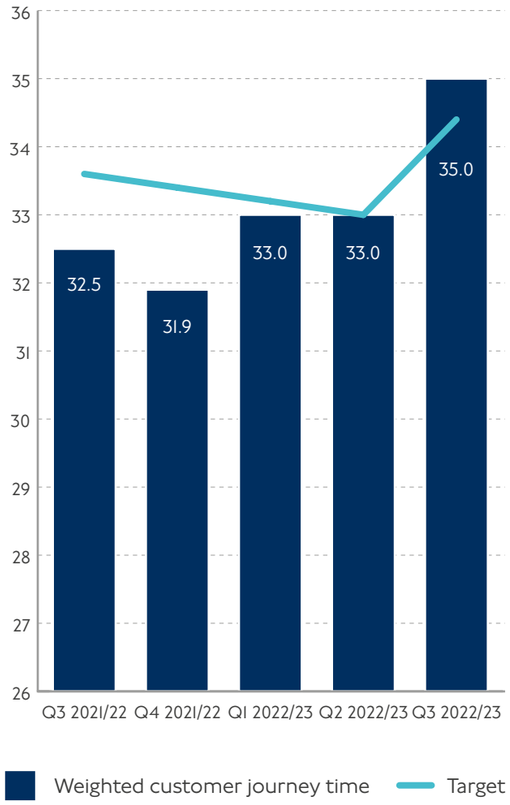
Passenger journeys were 84 per cent of pre-coronavirus pandemic levels compared to a target of 82 per cent. London Underground and bus demand are both now at 81 per cent of pre-pandemic levels. The increase in ridership levels further demonstrates that customers are increasingly confident traveling around our easily accessible network.

* Quarter 4 is longer than Quarters 1-3 (16 weeks and one day vs 12 weeks)

Bus journey time

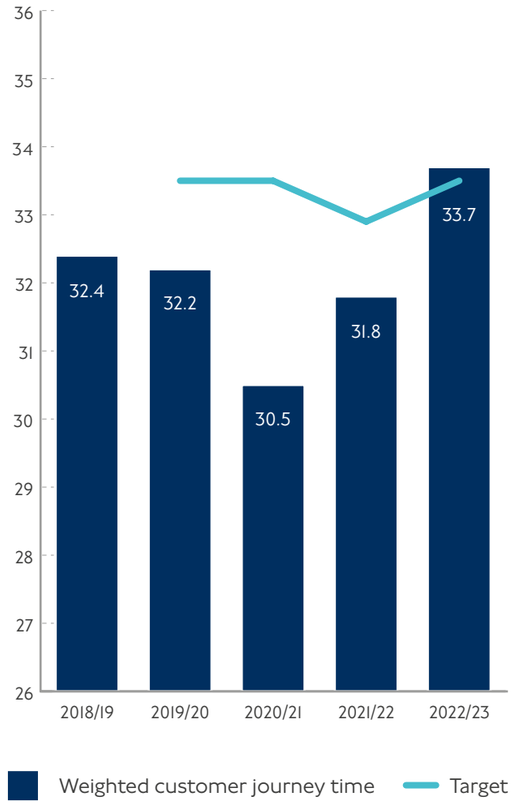
We measure the average time our passengers spent on their bus journey, which is an accumulation of all stages of a customer's journey, in minutes. It enables us to monitor the performance of our bus service from the perspective of our customers. Quicker journeys are more likely to encourage people back onto our network as we recover from the coronavirus pandemic.

Bus journey time
Past five quarters (minutes)



The weighted bus customer journey time in Quarter 3 (35.0 minutes) was higher than the previous two quarters in 2022/23. This is the first quarter of the past five where the actual journey time was slightly higher than the target journey time (34.4 minutes). We attribute this to longer waiting times and lower reliability levels as a result of reduced staff availability, mechanical issues and increasing levels of traffic on the roads.

Annual trend (moving average)



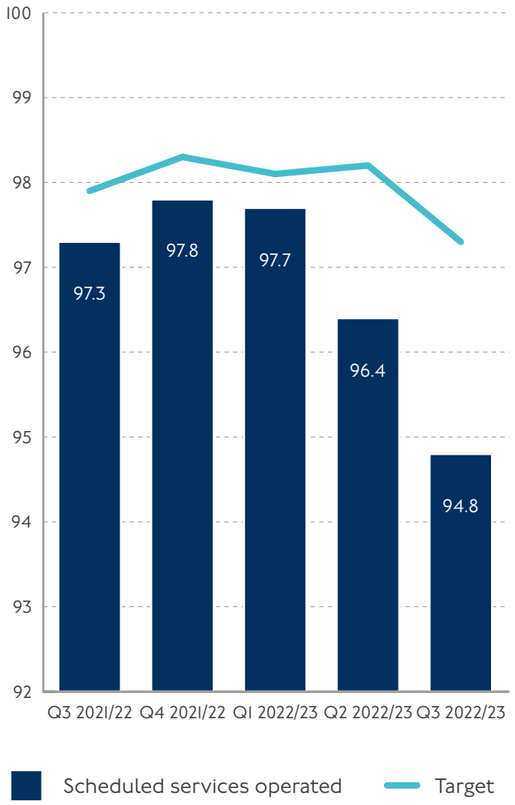
The actual average bus customer journey time for 2022/23 up to Quarter 3 is 33.7 minutes, slightly above the target of 33.5 minutes. Both the actual and target bus customer journey time in 2022/23 are higher than previous years, reflecting the longer average journey bus customers are making since 2019/20. Actual journey time is also impacted by lost bus mileage.

Services operated

For the majority of our services, we measure reliability as a percentage of the timetabled services that run as scheduled, or as a percentage of the total planned operating time when the service is actually available to customers.

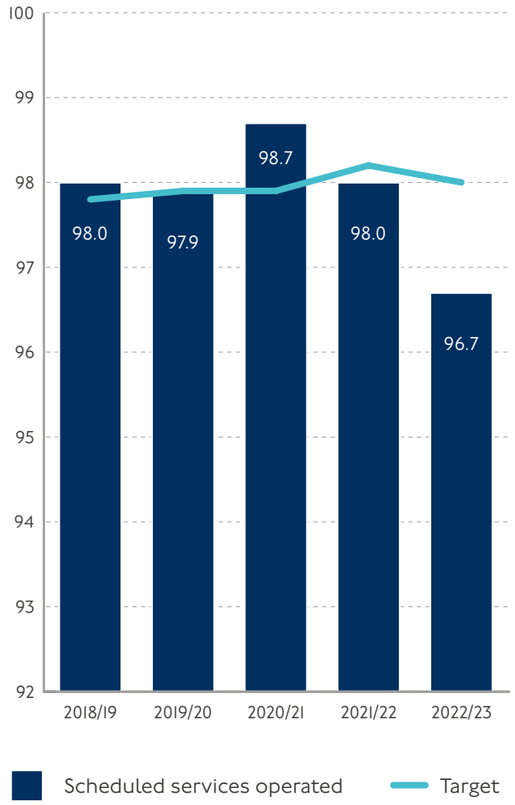
Bus scheduled services operated

Past five quarters (%)



Quarter 3 performance was impacted by very high levels of bus operator staff shortage caused by a mixture of sickness, vacancies and strike action. We also saw a minor increase in mechanical issues with vehicles, along with increased congestion linked to the rail strikes.

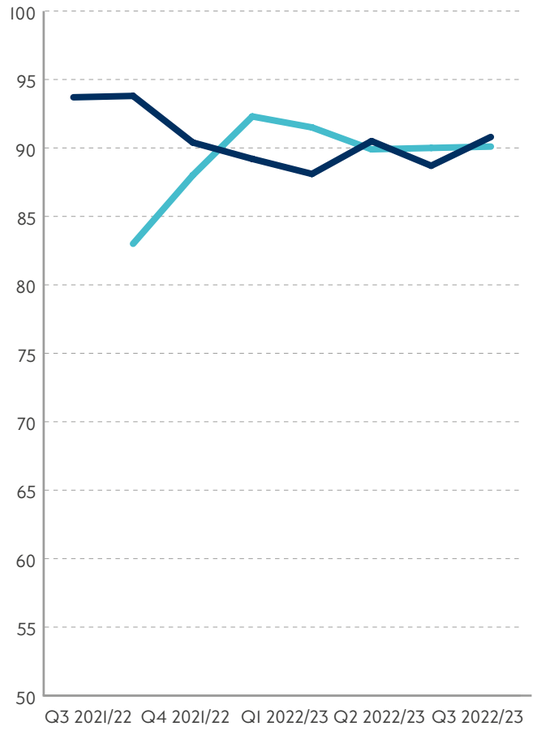
Annual trend (%)



The past four quarters have been impacted by bus operator strike action, multiple Tube and National Rail strikes and the funeral of Queen Elizabeth II. There have also been much higher than normal staff shortages due to both driver sickness and vacancies. Congestion has typically been lower than the pre-coronavirus pandemic base but has begun to increase more recently.

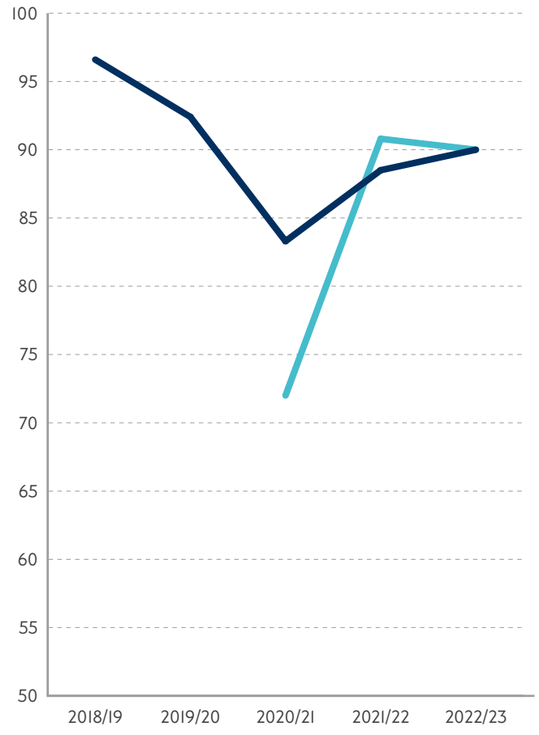
London Underground trips operated, against schedule

Past five quarters (%)



The level of scheduled service operated in Quarter 3 has improved to 90.8 per cent, which is 1.6 percentage points higher than the same quarter in 2021/22. Fleet availability has improved on the District line but we are still seeing issues on the Jubilee and Central lines. Staff and fleet availability remain the top two factors affecting service levels. The network was also disrupted by industrial action on Network Rail services.

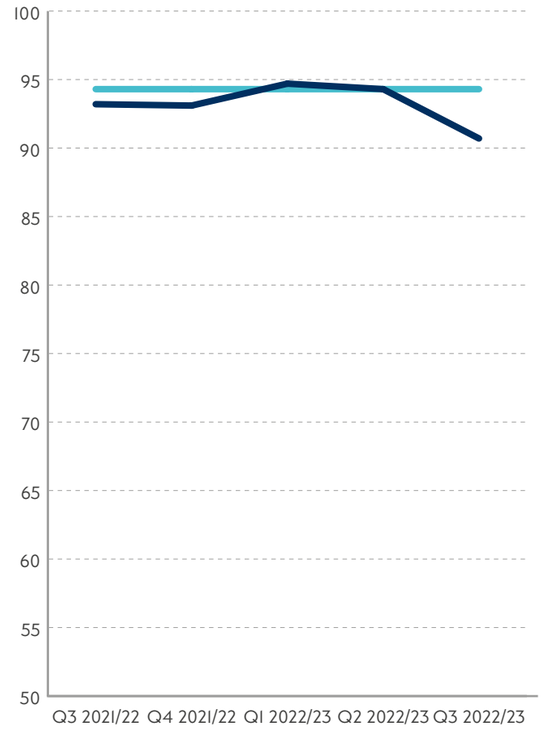
Annual trend (%)



Services operated for the year to date is showing an improving trend, currently standing at 90.0 per cent. As in the first two quarters of 2022/23, the year-to-date figure is higher than the previous two financial years but remains below pre-coronavirus pandemic levels.

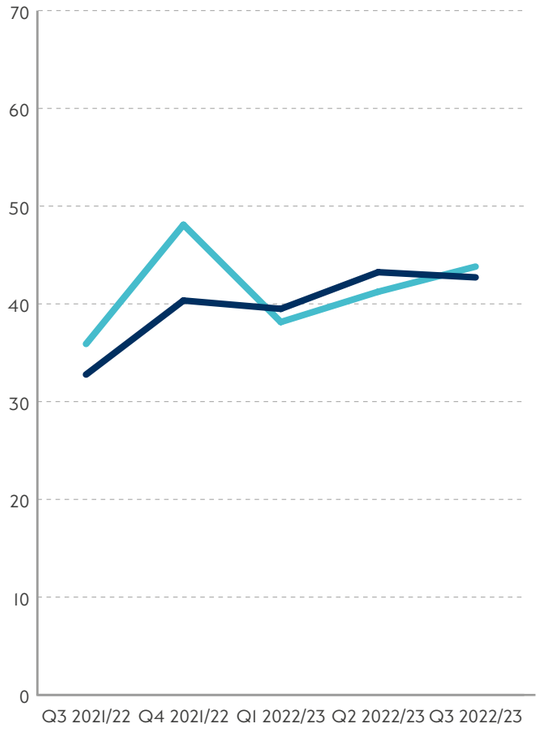
Elizabeth line public performance measure

Past five quarters (%)



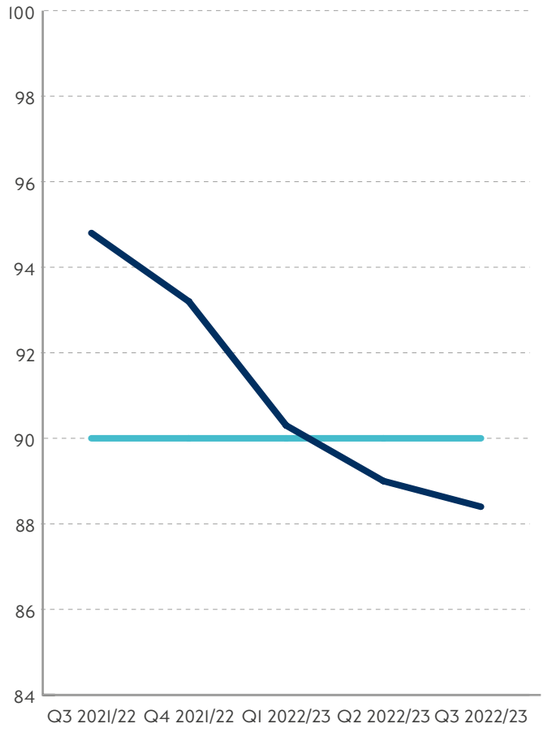
This quarter the Elizabeth line delivered a public performance measure of 90.7 per cent. There was a historic moment on 6 November when the central operating section joined up with the mainline railways to the east and west. This enabled customers to travel the full length of the line without changing trains.

Victoria Coach Station departures
Annual trend (moving average, thousands)



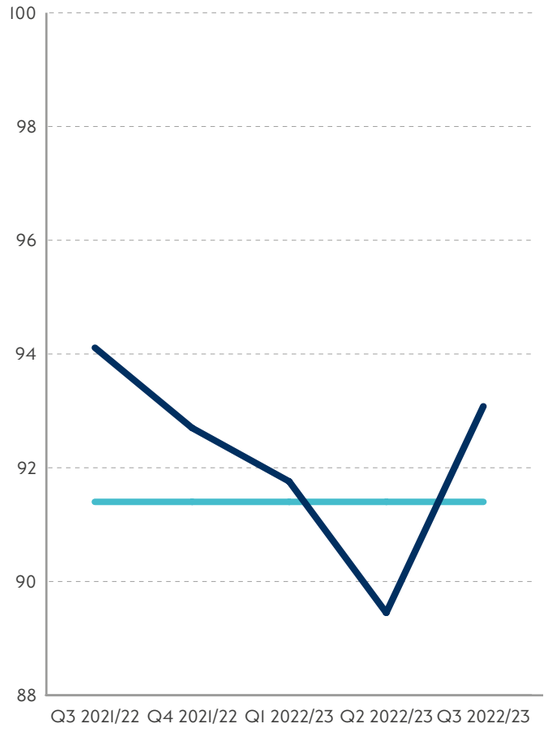
Victoria Coach Station continues to show a positive trend towards pre-coronavirus pandemic numbers of departures. This is reflected in the increased departure numbers seen since Quarter 4 2022/23. Domestic, foreign and tour operators continue to rebuild their business operations to enable UK and wider market growth in the coach industry, which the station continues to support.

Dial-a-Ride trip requests scheduled
Past five quarters (%)



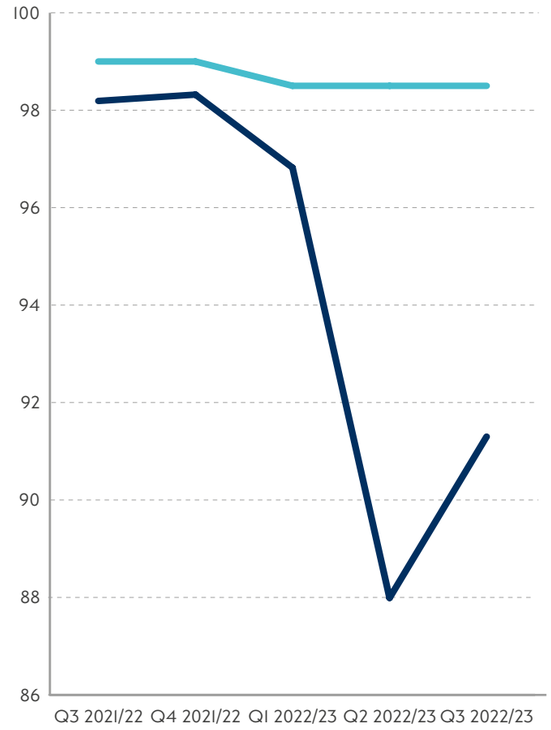
The number of trip requests that were scheduled this quarter fell just under the 89 per cent target. This is largely due to increased demand, which has been increasing period-on-period and is currently at 63 per cent of pre-coronavirus pandemic levels. To address this we are seeking to recruit more drivers.

London Overground time to three
Past five quarters (%)



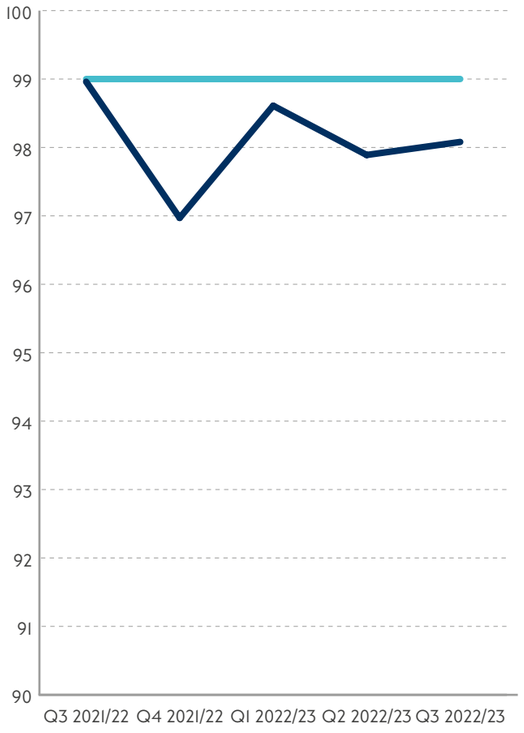
Performance was better than target in this quarter, reaching 93.08 per cent. This is despite being unable to operate any service on the Richmond and Clapham Junction to Stratford line for a day due to problems with overhead power lines. Our strike timetables worked well, with increased services on the Sydenham to New Cross section to mitigate against overcrowding.

London Trams scheduled services operated
Past five quarters (%)



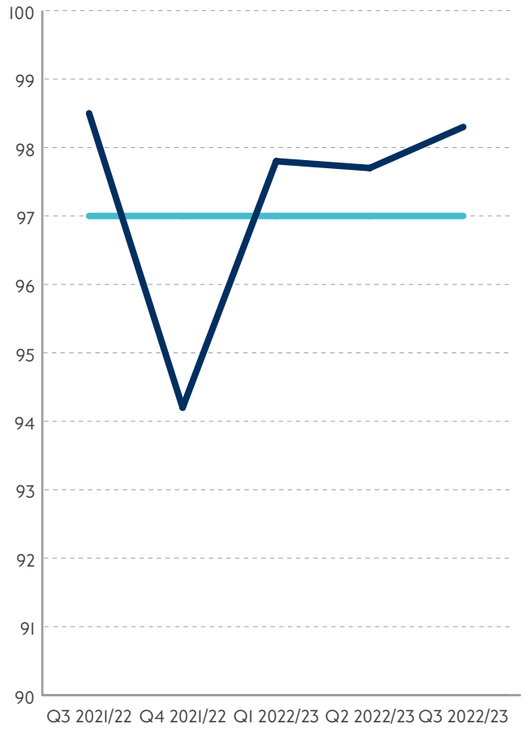
Tram performance this quarter was below target, with 91.3 per cent of scheduled services operated. We attribute this to several factors, including: reduced fleet availability, industrial action, and the impact of 11 service suspensions that resulted in delays, none of which had a common root cause. Fleet availability and reliability has improved since the previous quarter.

DLR departures
Past five quarters (%)



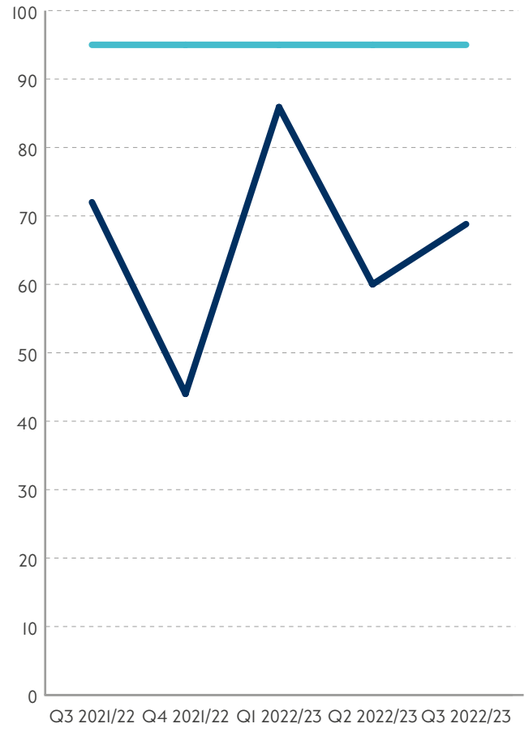
DLR performance remained below target this quarter. This was primarily due to two significant disruptions. These were a failure of the communications system, which was out of service for one day but took three days to fully restore; and industrial action on London Underground, which prevented the DLR from serving Bank station for part of the strike day.

IFS Cloud Cable Car availability
Past five quarters (%)



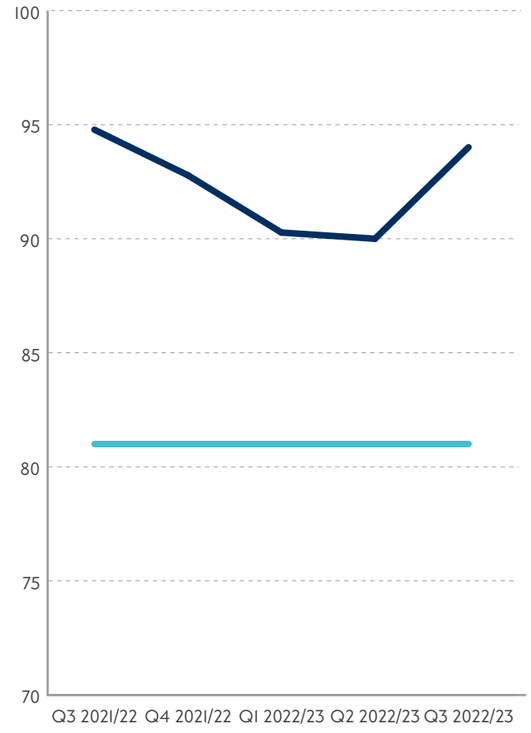
Cable car availability remains above target at 98.3 per cent, and close to the 98.5 per cent we achieved in the same quarter last year. Downtime this quarter was mainly due to seasonal high gusting wind at tower height.

Woolwich Ferry availability
Past five quarters (%)



Woolwich Ferry availability was 68.8 per cent this quarter, compared to 72 per cent for the same quarter last year. Service downtime was mainly due to crew resourcing issues but there were also failures of equipment.

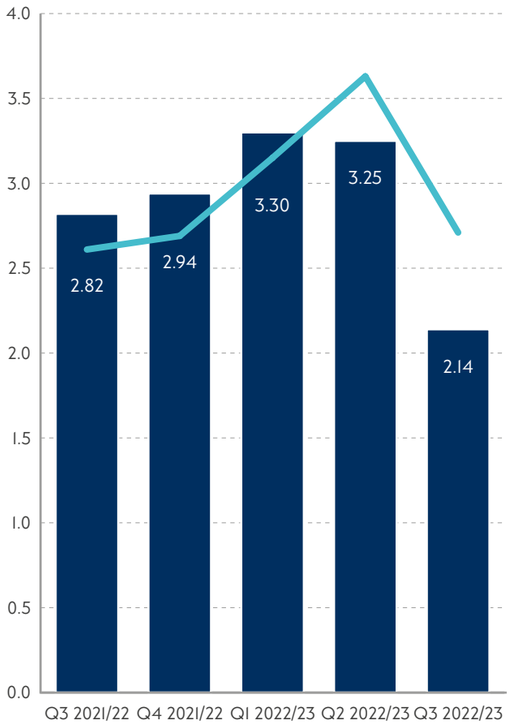
Santander Cycles docking station availability
Past five quarters (%)



Docking station availability remained very high this quarter, with an empty docking point or bike available on average 94 per cent of the time. This is above the 81 per cent target. A reduction in the total number of hires contributed to this increase in availability.

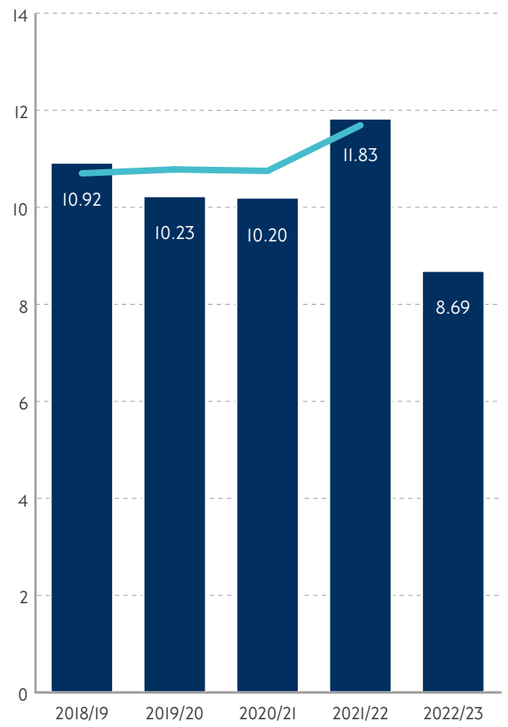
Santander Cycles

Hires made
Past five quarters (millions)



There were 2,136,497 hires this quarter, which is 21 percentage points below target, and a reduction of 574,205 hires on Quarter 2. This quarter, we experienced some minor issues following the introduction of a new back-office system, which impacted customers' ability to hire cycles. We also experienced a significant amount of inclement weather, which affects hire volumes.

Hires made
Annual trend (year to date)



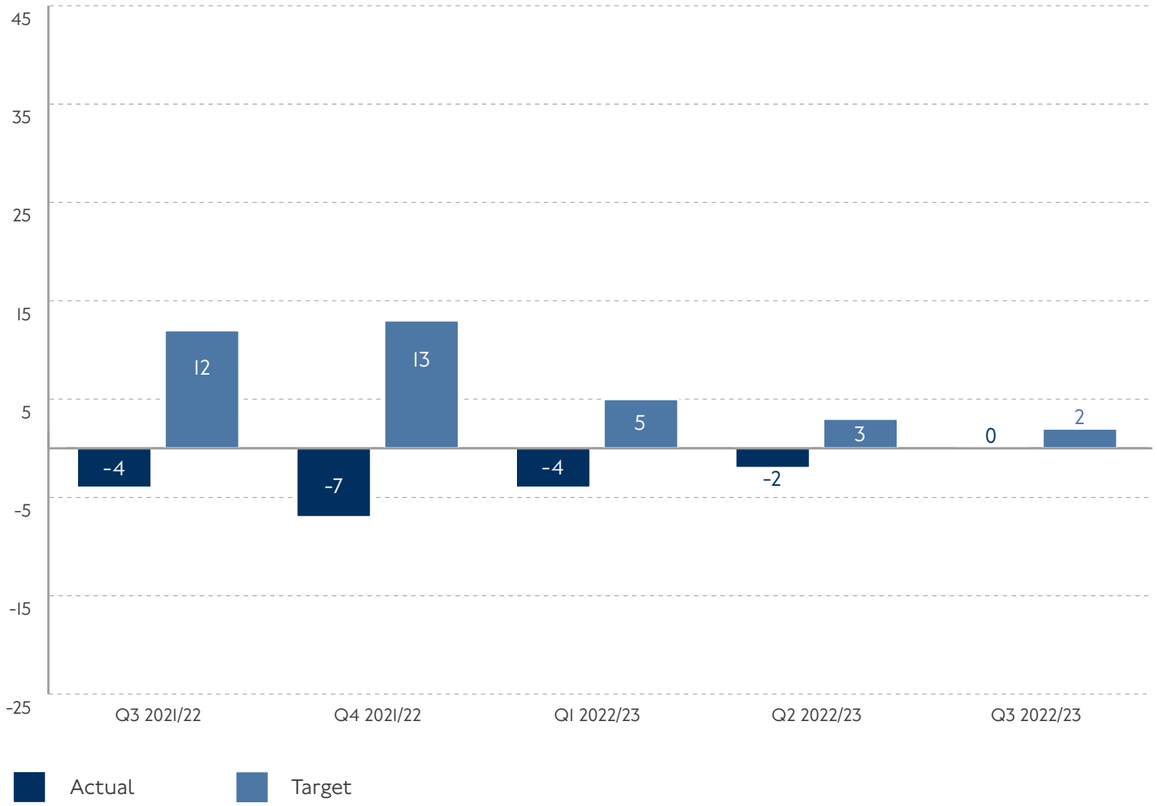
More than 8.6 million hires have taken place so far in 2022/23. The dip in number of hires is caused by several factors as previously reported, but we have seen an increase in e-bike hires.

More than 8.6 million cycle hires have been made in 2022/23

Roads and traffic

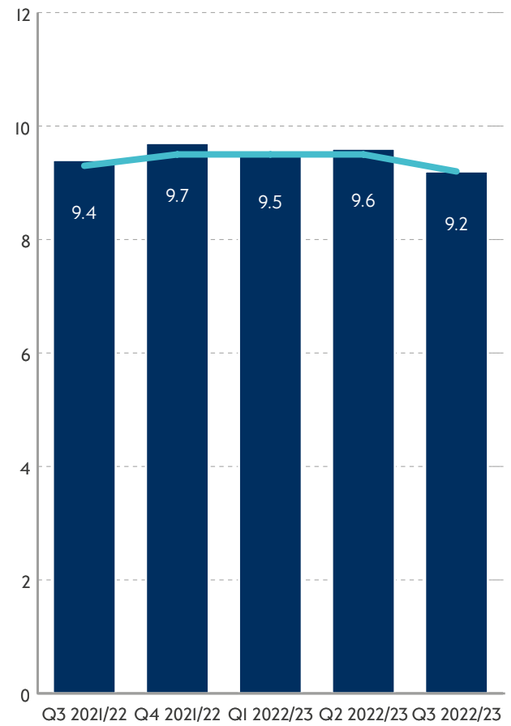
During this quarter, our road network has been disrupted by increased industrial action and demonstration activity. Traffic flow on our roads remains below pre-coronavirus pandemic levels.

Road disruption
Past five quarters (%)



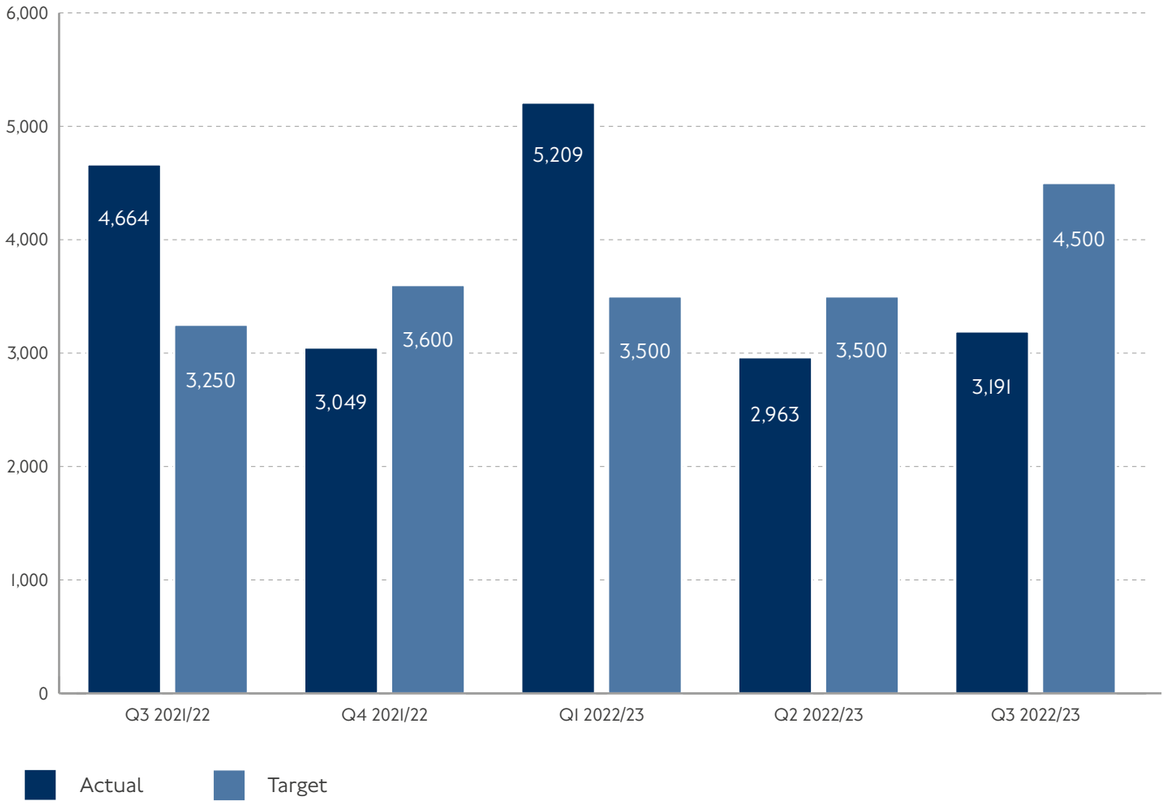
Quarter 3 saw road disruption remain below 2019 levels, which was largely due to industrial action in the second half of October and a reduction in the number of serious or severe incidents. Roadworks on the A4 Great West Road and Stop Oil protests in October caused most of the disruption this quarter. Total disruption across our roads this quarter was below the expected target of plus seven per cent. Overall disruption remains below 2019 levels, with the year-to-date average being minus two per cent.

Bus average speed
Past five quarters (mph)



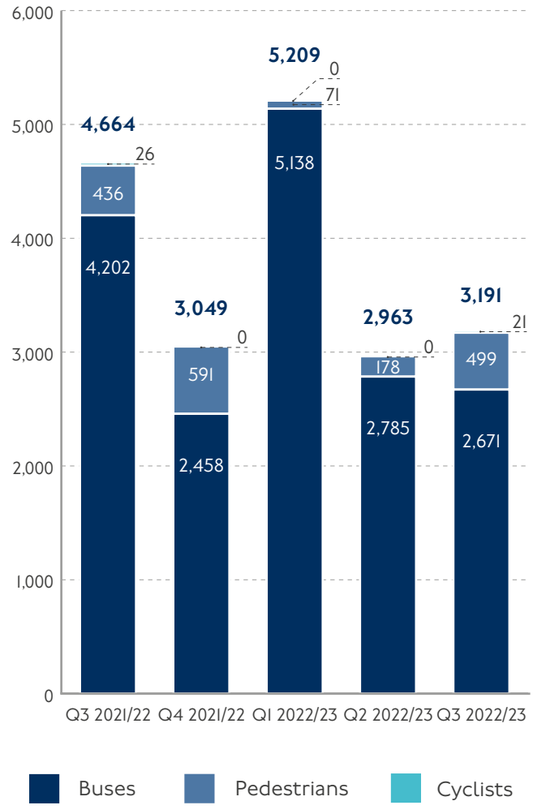
Average bus speed has remained higher than the pre-coronavirus pandemic base throughout the past five quarters, which have seen both lower levels of general traffic disruption and passenger volumes. Typical seasonal variations have been recorded but with the actual speed tracking at two to three percentage points faster than the pre-pandemic base.

Traffic signal time savings
Past five quarters (hours)



Quarter 3 saw 3,191 hours saved for sustainable modes from our traffic signal review programme. This was below the quarterly forecast of 4,500 hours, but as with Quarter 2, this is a phasing issue, offsetting the higher than anticipated levels of delivery in Quarter 1. The programme is on course to deliver the anticipated benefits by year end, and we have resolved most of the operational issues that were affecting our ability to measure benefits.

Type of road user benefiting from signal timing review
Past five quarters (hours)



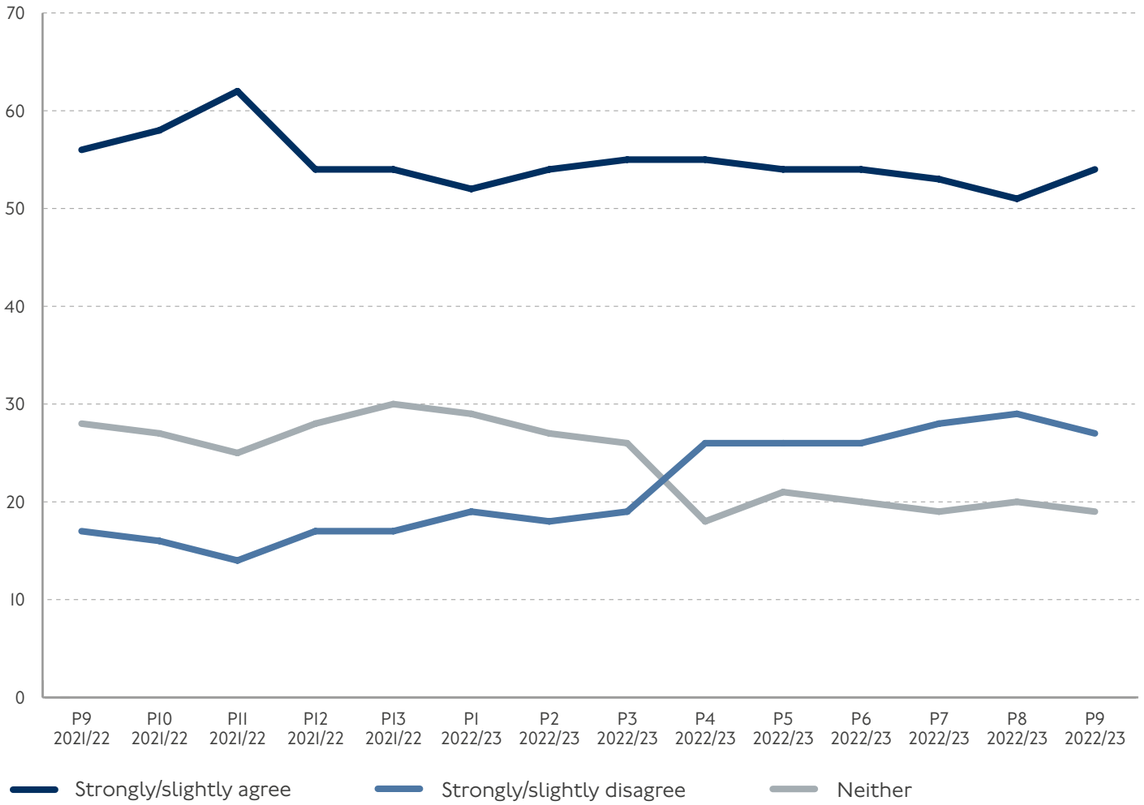
Quarter 3 once again saw strong savings for bus passengers, totalling more than 2,500 hours per day. In addition, we saved nearly 500 hours for pedestrians and 21 hours for cyclists. We are confident we can achieve our end-of-year target.

Customers

We have continued to support and engage our customers to ensure we deliver the best possible customer experience

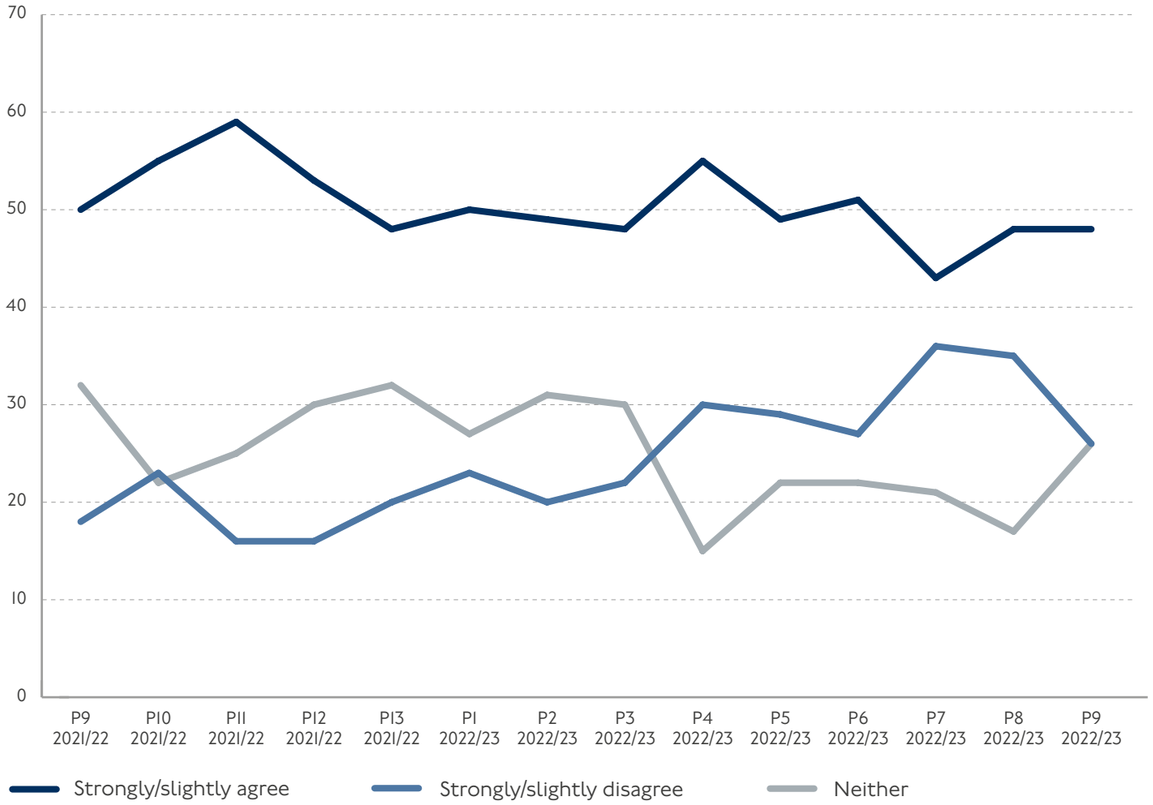
TfL cares about its customers

All Londoners
Agreement, disagreement, neither (%)



The percentage of Londoners agreeing with the statement 'TfL cares about its customers' in this quarter is 53 per cent. Among public transport users, which is defined as people who have used public transport within the previous seven days, the figure is 56 per cent. Our overall score for the year to date is 54 per cent, three percentage points below our scorecard target. A number of ongoing factors continue to affect our care score: strike action across our network, cost of living crisis and a busier network compared to last year.

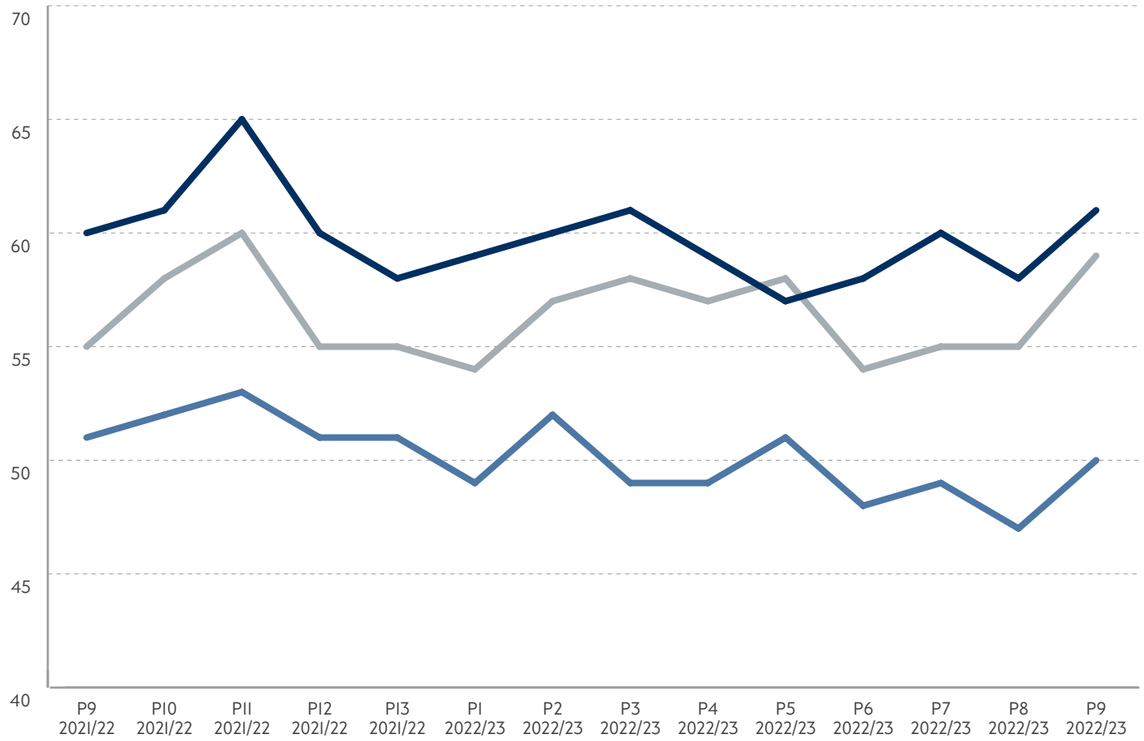
Disabled Londoners
Agreement, disagreement, neither (%)



The percentage of disabled Londoners agreeing that 'TfL cares about its customers' in this quarter is 46 per cent. Our overall score for the year to date is 49 per cent, three percentage points lower than our 2021/22 score. Disabled Londoners continue to feel less confident to travel than non-disabled Londoners, but the gap is closing gradually.

Key survey questions

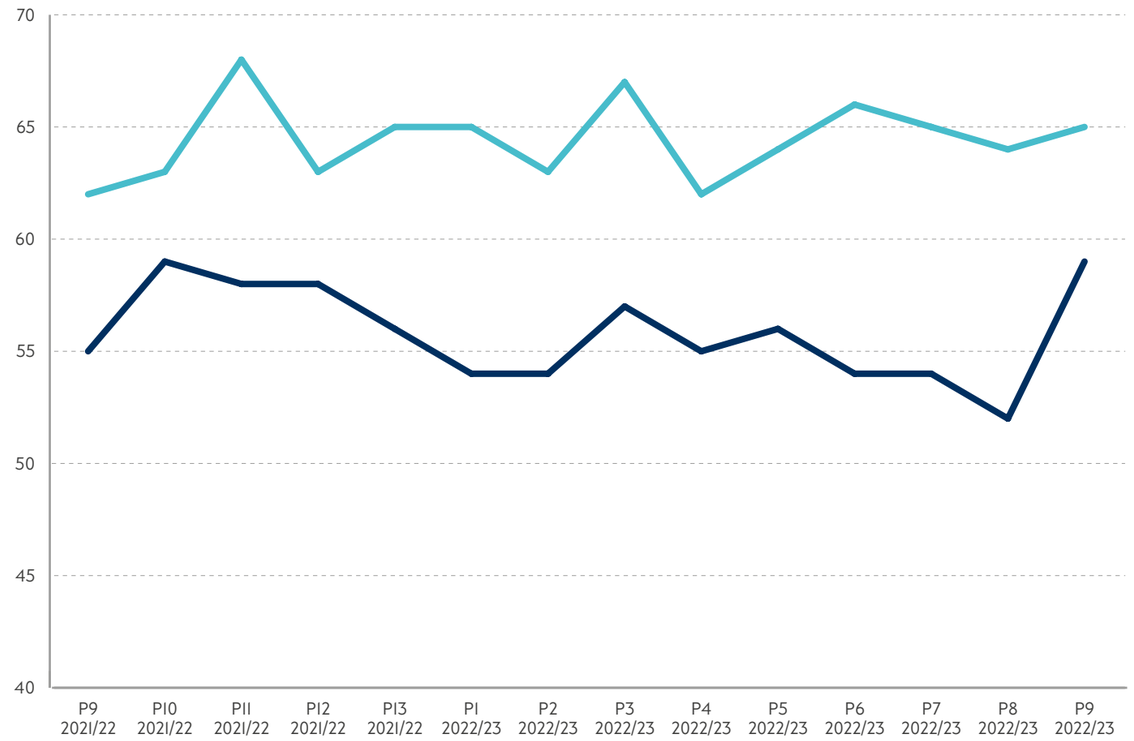
Agreement (%)



Through analysis, we have identified the five key drivers that have the most influence on Londoners' perception and our 'TfL cares about its customers' metric. Supporting customers when things go wrong remains a key focus area to improve customers' experience.

Overall, scores have seen a slight increase in this quarter. Over the longer term, metrics remain on a gradual downward trend, moving back towards levels typical of operations before the coronavirus pandemic.

Agreement (%)



This downward trend reflects a significant period of uncertainty due to transport strikes and speculation on TfL's funding position, with both having a negative impact on customer perceptions. A continued focus on our core operational performance is critical, as well as ensuring that we support customers when services are disrupted.

Winning back our customers: key areas focus

To continue winning customers back we are focusing on the brilliant basics. We will do this by providing a consistent and reassuring staff presence, maintaining a clean network and striving to operate a safe, reliable and efficient service.

With increased instances of industrial action disrupting services on both National Rail and our network we will continue to provide timely, up-to-date and consistent information to enable customers to navigate our network if they need to travel on strike days.

We're working hard to bring customers back to our network

The Elizabeth line continues to record high satisfaction scores

Satisfaction

Past five quarters
Score

	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Q3 2022/23
London Underground	75	76	76	75	75
London Buses	78	78	78	78	77
DLR	77	78	77	78	77
London Overground	76	76	77	77	76
London Trams*	76	N/A	N/A	N/A	76
Elizabeth line	76	76	78	83	82

In Quarter 3, overall satisfaction decreased slightly, although not significantly for most modes. Satisfaction with the Elizabeth line remains high, despite a decrease this quarter after a record high score in Quarter 2, which saw the launch of the service.

* London Trams are not surveyed on Customer Satisfaction Score continually, but once a year in Quarter 3, so N/A is shown for all other quarters

Calls

In addition to our general contact centre, we have dedicated lines for road charging and the Ultra Low Emission Zone (ULEZ), Taxis and private hire, and Dial-a-Ride.

General contact centre calls

Past five quarters

	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Q3 2022/23
Telephone calls	696,500	604,653	514,986	580,593	648,557
Calls abandoned (%)*	22.78	13.02	9.8	14.54	14.22
Correspondence	163,862	198,028	189,111	218,007	228,217
Cases closed (%)**	70.33	68.96	81.12	83.44	82.03
Average speed of answer (seconds)	1573	779	366	348	724

Past five years

	2018/19	2019/20	2020/21	2021/22	2022/23 year to date
Telephone calls	2,699,025	2,687,696	1,304,300	2,292,137	1,744,138
Calls abandoned (%)*	10.9	16.2	7.6	16.12	12.97
Correspondence	609,201	757,298	364,778	580,567	635,335
Cases closed (%)**	82.0	78.9	83.4	73.80	82.22

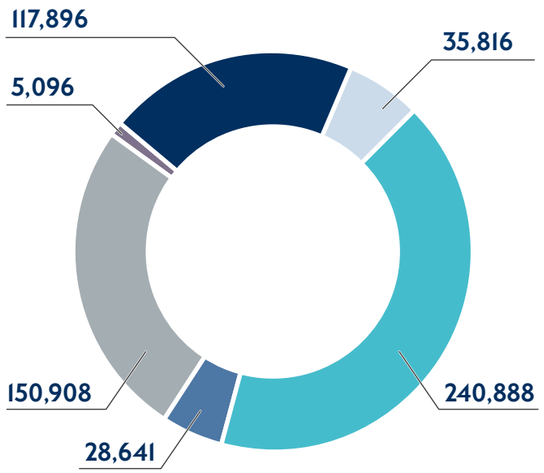
The number of calls to our contact centre rose 12 per cent compared to the last quarter, but was nine per cent lower than the same quarter last year. Abandoned calls fell by two per cent this quarter and are 38 per cent lower than last year, while wait times were up 108 per cent on last quarter but down 54 per cent on last year. This is due to the seasonal increase in demand around photocards we see in this quarter. Careful planning has enabled us to improve our performance on last year significantly.

Correspondence demand also increased five per cent on Quarter 2, and is up 39 per cent on the previous year.

* Target of 15 per cent or lower

** Cases responded to within the agreed timeframe. Our target is to respond to 80 per cent of correspondence within three working days, or 10 working days for more complex issues that require investigation

Calls by subject*
This quarter



Overall, we've seen a 14 per cent rise in call volumes on last quarter, though volumes are down by 17 per cent from Quarter 3 2021/22. This is in line with our improved handling of the start of our seasonal peak.

Contactless demand is up 11 per cent on last quarter, and up 29 per cent on the previous year as passenger numbers continue to recover. Oyster demand fell seven per cent on last quarter and was down 32 per cent on last year.

Surface and Rail was down two per cent on last quarter, down five per cent on last year.

Cycle hire increased 33 per cent on last year, despite recording a 10 per cent fall on last quarter.

* Surface and Rail comprises London Underground, London Buses, London Overground, IFS Cloud Cable Car, DLR, Elizabeth line, cycling (general), River services, safety and coaches. Other comprises public Help Points, Taxis and private hire, ticketing apps, Sarah Hope Line and street-related calls

Our contact centres continue to handle a high volume of calls

Road charging and ULEZ

Past five quarters

	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Q3 2022/23
Calls received	462,698	559,940	334,393	286,306	270,099
Calls answered	431,969	542,331	328,045	281,449	264,702
Calls abandoned (%)	6.6	3.1	1.9	2.0	2.0
Average speed of answer (seconds)	76	14	24	34	41

Our road user charging contact centre, operated by Capita, continues to perform well within contractual targets, with call volumes during Quarter 3 remaining stable. The average speed of answer for Quarter 3 is 41 seconds and the call abandon rate is two per cent against a target of no more than 12 per cent of calls.

The spike in Quarter 4 2021/22 was caused by increased volumes due to the expansion of the Ultra Low Emission Zone and changes to the Congestion Charging scheme hours.

Past five years

	2018/19	2019/20	2020/21	2021/22	2022/23 year to date
Calls received	1,080,837	1,486,715	1,145,772	1,590,871	890,798
Calls answered	1,043,877	1,440,357	1,093,382	1,518,973	874,196
Calls abandoned (%)	3	3	5	5	2
Average speed of answer (seconds)	43	42	63	48	32

Taxis and private hire

Past five quarters

	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Q3 2022/23
Calls received	72,942	56,597	48,626	55,575	155,402
Calls answered	65,385	55,938	47,858	54,425	100,558
Calls abandoned (%)	10.4	1.2	2.0	2.0	35.0
Average speed of answer (seconds)	314	21	29	40	2,145

Past five years

	2018/19	2019/20	2020/21	2021/22	2022/23 year to date
Calls received	840,178	749,561	222,291	235,135	259,603
Calls answered	582,022	532,096	158,847	225,445	202,841
Calls abandoned (%)	30	29	29	4	22
Average speed of answer (seconds)	733	699	896	111	1,081

In Quarter 3 we saw a significant increase in demand for taxi and private hire vehicle licensing services, with 180 per cent higher call volume than usual. This was due to changes to private hire vehicle licensing that required all newly licensed private hire vehicles to be Zero Emission Capable from 1 January 2023.

Ahead of this change being introduced, the private hire industry sought to license as many non-compliant vehicles as possible, severely impacting our telephone and vehicle inspection services. We had anticipated an increase in demand and pre-emptively increased our capacity by around 20 per cent, implementing a number of mitigating measures, including a temporary telephone number for renewal requests. We also increased inspection capacity, including opening at weekends. However, even with these additional measures the demand far exceeded our capacity.

We took the decision that any taxi or private hire vehicle with a licence due to expire in December would remain licensed until April 2023, subject to the vehicle obtaining a satisfactory MOT for safety purposes. This allowed drivers to continue working at their busiest period of the year.

We have since seen call volumes and demand for vehicle inspections return to normal levels, confirming this was a temporary issue that is unlikely to be repeated. We have enough capacity in April to be able to undertake the necessary vehicle licensing inspections.

Dial-a-Ride

Past five quarters

	Target	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Q3 2022/23
Calls received	N/A	83,958	102,724	91,224	93,267	75,705
Calls abandoned (%)	10	9.7	13.8	11.2	11.1	11.0
Average speed of answer (seconds)	180	238	344	276	275	276
Email bookings	N/A	10,186	10,684	10,728	9,761	10,202

Our average speed of answer and abandoned rate remained similar to the previous quarter. While this is encouraging, because of increased demand currently standing at 63 per cent pre-coronavirus pandemic levels, we are still not consistently hitting our targets.

We are addressing this shortfall through recruitment campaigns to increase the number of operators available to answer calls and make trip reservations. This should help improve the performance overall and achieve the target for abandoned call percentage.

Note that data between Saturday 19 November and Thursday 8 December 2022 of Period 9 is missing due to a telephone software upgrade. As a result, our call volumes are significantly under-reported, and our performance statistics do not include this period.

Past five years

	2018/19	2019/20	2020/21	2021/22	2022/23 year to date
Calls received	564,391	533,868	117,275	299,944	260,196
Calls abandoned (%)	10.5	10.7	5.5	10.6	11.1
Average speed of answer (seconds)	233	287	108	249	275
Email bookings	45,950	82,450	6,368	31,573	30,691

Complaints

Complaints

Year on year (per 100,000 journeys)

	Q3 2021/22	Q3 2022/23	Variance (%)
London Underground	1.22	0.88	-28
London Buses	3.32	3.82	15
DLR	0.54	0.94	74
London Overground	0.65	0.36	-45
Elizabeth line	2.04	0.74	-64
London Trams	0.82	0.83	1
IFS Cloud Cable Car	3.47	4.17	20
Congestion charge	3.33	2.21	-34
Dial-a-Ride*	74.92	97.97	31
London River Services	0.16	0.12	-25
Santander Cycles	2.16	4.57	112
Taxis**	4.21	5.12	22
Private hire**	2.24	2.88	29
Contactless	0.5	0.5	0
Oyster	0.83	0.63	-24

Past five years

	2018/19	2019/20	2020/21	2021/22	2022/23 year to date
London Underground	0.98	1.14	1.74	1.26	0.99
London Buses	3.17	3.17	4.37	3.29	3.38
DLR	0.78	0.89	1.09	0.54	0.70
London Overground	1.69	1.58	1.24	0.65	0.53
Elizabeth line	2.39	2.30	2.26	1.77	0.93
London Trams	1.28	1.65	1.76	0.85	0.89
IFS Cloud Cable Car	4.11	2.83	2.57	4.69	3.67
Congestion charge	1.59	2.48	3.83	3.55	2.27
Dial-a-Ride*	69.86	83.62	64.87	61.33	72.34
London River Services	1.49	1.26	2.44	0.47	0.24
Santander Cycles	4.00	3.54	2.68	2.24	3.15
Taxis**	7.22	8.06	1.69	3.24	3.36
Private hire**	2.95	2.57	1.36	2.3	2.01
Contactless	0.21	0.40	0.39	0.5	0.53
Oyster	0.15	0.17	0.26	0.48	0.5

London Underground saw a 28 per cent drop in complaints, despite a 24 per cent increase in passenger numbers. London Overground and the Elizabeth line followed this pattern with Overground complaints down 45 per cent against a 44 per cent rise in journeys, while the Elizabeth line saw a 64 per cent fall in complaints and a 248 per cent increase in demand.

Buses, IFS Cloud Cable Car, and Dial-a-Ride all saw complaints increase in line with increases in customer demand. DLR saw a 74 per cent rise in complaints against a seven per cent rise in demand, driven by complaints relating to delays. This was due to the change in timetables and reduction in train size implemented during September.

Ticketing remained constant with 0.5 complaints per 100,000 journeys, despite a 36 per cent increase in demand. Oyster complaints fell 24 per cent despite demand being 11 per cent higher than this time last year. Overall we are still seeing a shift towards Contactless and its flexibility as we recover from the coronavirus pandemic.

Overall, complaints per 100,000 journeys are tracking slightly higher than last year. Of the major rail modes, London Underground (down 21 per cent), Overground (down 18 per cent) and the Elizabeth line (down 47 per cent, despite increased passenger numbers) are all performing very well.

Buses are three per cent higher than last year, while Oyster and Contactless are also slightly higher than the previous year. IFS Cloud Cable Car, Congestion Charge, London River Services and private hire are all showing improvements on last year.

Santander Cycles are up 41 per cent on last year, though the complaints are mostly from customers experiencing issues with the mobile app. We are working with our colleagues in that area to investigate this trend in more detail and find a resolution.

* The highly individual nature of the Dial-a-Ride service results in a high complaint rate compared to the mass-volume mainstream modes.

** Journeys not recorded; figures based on survey data. Taxis and private hire complaint numbers are not directly comparable due to the way they are received and recorded.

Customers praise the support our frontline staff offer

Commendations

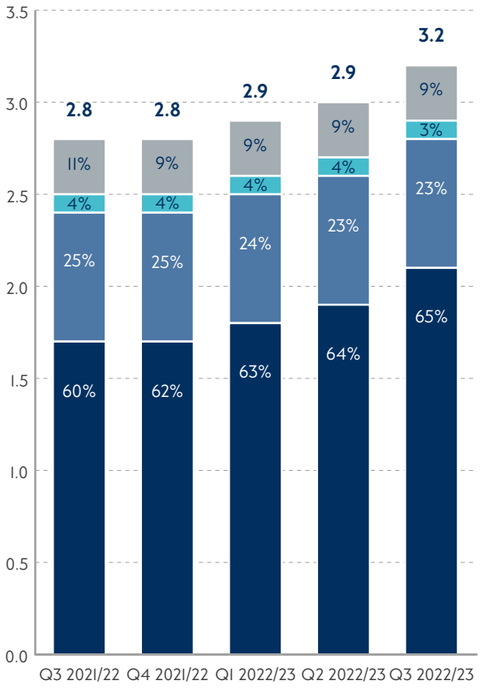
Commendations
Past five quarters

	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Q3 2022/23
London Underground	259	272	337	312	290
London Buses	607	733	693	610	577
DLR	12	2	12	20	11
London Overground	38	33	26	39	24
Elizabeth line	29	39	11	52	46
London Trams	5	8	2	2	2
IFS Cloud Cable Car	7	4	5	8	7
Dial-a-Ride	35	13	8	4	3
London River Services	2	3	3	0	1
Santander Cycles	0	0	0	0	0
Taxis and private hire	23	20	31	30	26
TfL Road Network	0	2	0	1	1
TfL Policy	4	3	8	6	5

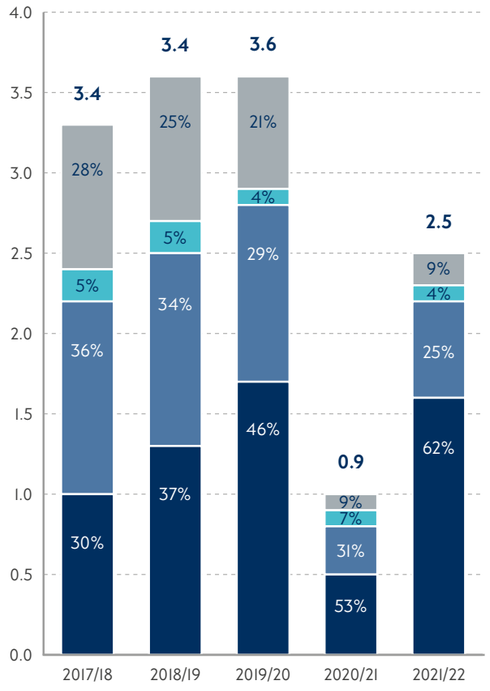
Commendations fell by nine per cent on last Quarter, down three per cent on the previous year. Despite this, both London Underground and the Elizabeth line have each seen rises on the previous year, up 12 per cent and 59 per cent respectively. This is alongside significant falls in complaint volumes on these modes.

Tickets

Fare payer split on typical weekdays*
Past five quarters (millions)**



Past five years (millions)***



131m

contactless bank cards and mobile devices have been used on Buses, Tube and Rail services since launch

4.1m

contactless journeys are made daily

Since travel restrictions relating to the coronavirus pandemic eased in 2021, overall demand is recovering, although the recovery stalled at the end of 2021 due to the new restrictions to prevent the spread of the Omicron coronavirus variant. The share of contactless payment media (cards and mobile devices) used has increased to 65 per cent of all fare payer tickets this quarter, compared to 60 per cent a year ago.

Before the coronavirus pandemic, the total number of fare payer tickets used remained fairly stable every year, while the share of contactless increased. Demand declined dramatically while pandemic-related travel restrictions were in place. However, the use of contactless payment and Oyster pay as you go has recovered to a greater extent than Travelcards, suggesting some migration from the latter to the former since restrictions were lifted.

* Graphs use typical weekdays to represent the trend per time period. The number of Travelcards and bus and tram passes valid on these typical weekdays is used as a proxy for the number of tickets used. The population studied covers all fare payer ticket types, excluding paper single tickets, which comprise less than one per cent of journeys on the network

** Days measured:
Thursday 25 November 2021 Q3 2021/22
Thursday 17 March 2022 Q3 2021/22
Thursday 9 June 2022 Q3 2022/23
Thursday 8 September 2022 Q3 2022/23
Thursday 24 November 2022 Q3 2022/23

*** Days measured:
Thursday 8 February 2018
Thursday 7 February 2019
Thursday 6 February 2020
Thursday 4 February 2021
Thursday 10 February 2022

System availability

Ticketing system availability (%)

	Q3 2021/22			Q3 2022/23		
	Actual	Variance to target	Variance to last year	Actual	Variance to target	Variance to last year
London Underground – ticketing system overall availability	99.20	+1.00	-0.45	98.91	+0.71	-0.29
London Buses – bus validations – overall availability	99.75	+0.75	+0.13	99.67	+0.67	-0.08

Underground and Buses both exceeded their targets in this quarter. Travel using contactless payments continues to grow across all modes. Recent software changes to payment validators on buses have seen fault levels decrease, which we attribute to sustained performance.

Internal IT

Past five quarters (%)

	Q3 2021/22	Q4 2021/22	Q1 2022/23	Q2 2022/23	Q3 2022/23
System performance	99.96	99.91	99.87	99.97	99.73

Quarter 3 saw a drop of 0.24 per cent from Quarter 2, but still remains above the 99.60 per cent target. Fifteen Mission Critical Severity 1 incidents affected performance in this quarter across eight services, including seven incidents aligned to our Network Service. One incident aligned to our VMWare Service, open for two weeks, accounted for 72 per cent of the total outage time.

Annual trend (%)

	2018/19	2019/20	2020/21	2021/22	2022/23 year to date
System performance	99.87	99.93	99.94	99.90	99.86

Digital

At the end of the quarter, our TfL Go app has been downloaded more than 2.9 million times across iOS and Android devices. It is used by more than 540,000 customers each month. Our digital services overall have seen significant disruption-driven peaks.

We have made further progress towards launching integrated account and payment functionality into the app. Customers will be able to top-up their Oyster cards, purchase Travelcards and view their journey history from early 2023.

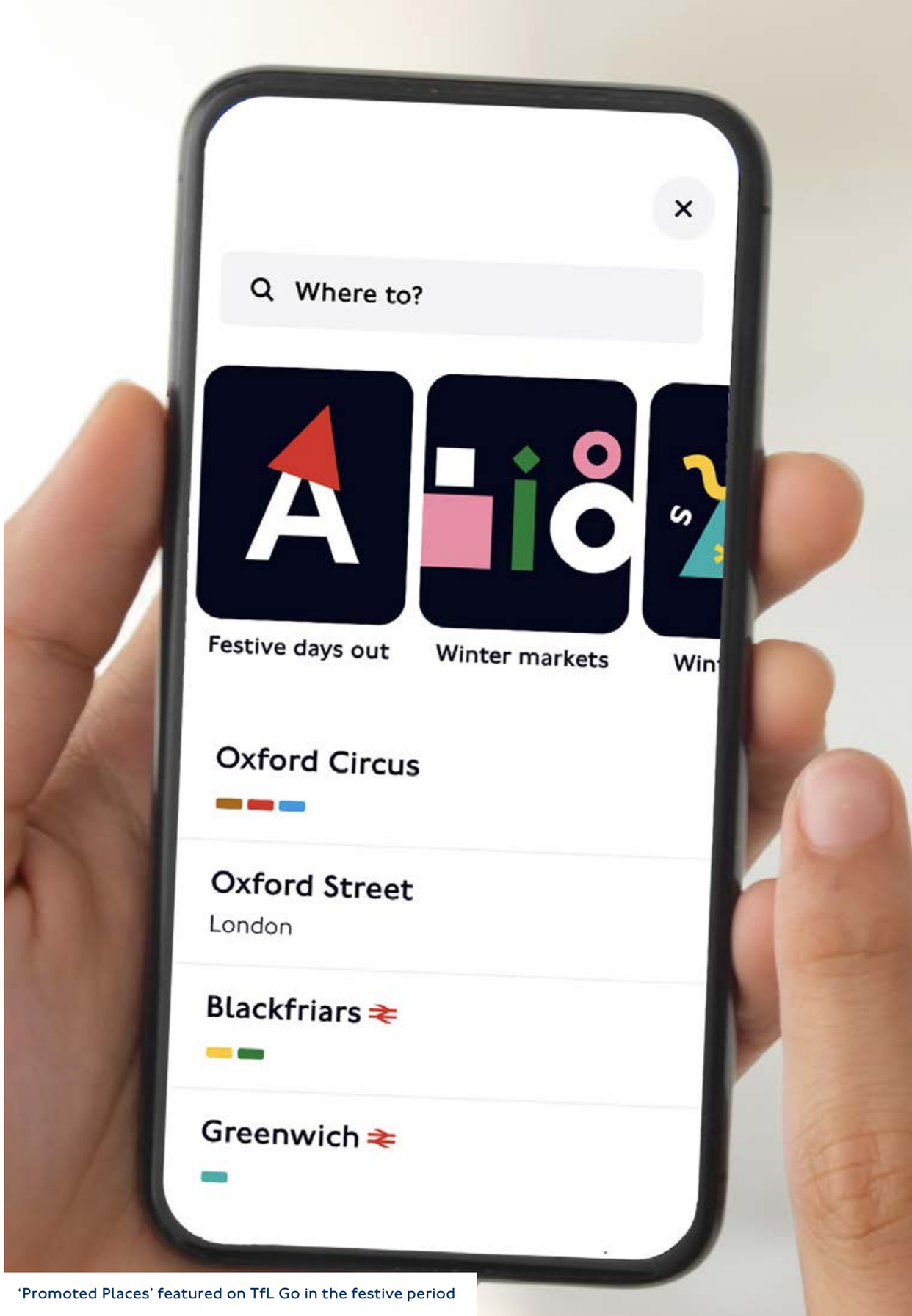
We are also testing a new version of our journey planner, which generates journey recommendations based on real-time bus arrivals rather than timetables.

During November and December, we ran 'promoted places' content to celebrate the opening of Bond Street station and to promote 'Festive days out'.

16.3m
unique devices visiting the TfL website this quarter

2.9m
downloads of the TfL Go app since launch

238.1m
website page views this quarter



'Promoted Places' featured on TfL Go in the festive period

Travel demand management

This autumn marked 10 successful years of the TfL Travel Demand Management team. Since its formative days supporting customers travelling to and from the 2012 London Olympic and Paralympic Games, the team's work has evolved and expanded, as reflected in our most recent activities.

This quarter, we encouraged Londoners to shop sustainably over the festive season through a suite of communications, including an online article and a new toolkit for employers, as we look to reduce road congestion associated with deliveries.

During this quarter, we also saw rolling industrial action, with strikes running over multiple days and networks. Working together with operators and Network Rail, we delivered coordinated and comprehensive communications to ensure customers were aware of these upcoming strikes, and help them plan their travel.

Our ambassadors support frontline staff at busy times

Campaigns

Campaigns – customer information email volumes
Past five years

	2018/19	2019/20	2020/21	2021/22	2022/23
Customer information emails (millions)	189	205	211	226	352
Campaigns	930	1,101	685	950	647

Keeping our customers informed

The role of our customer relationship management marketing programme is to support our core business objectives. Each email has a clearly defined purpose and audience. Emails are either an 'inform' or 'influence' message, in a short format (klaxon) or long format (thematic).

We deliver relevant and engaging content to our audience with the latest campaigns or partnership discounts, tailored and personalised to the database.

At present, the marketing database has 1,332,647 customers subscribed.

From 18 September to 10 December, we deployed 12 marketing emails to the database. These emails supported revenue-generating messages relating to school half-term activities; partnership discounts; wider London events; Active Travel, promoting walking and cycling; Christmas messaging; and wider TfL messaging.

352m
customer information emails sent in 2022/23 to date

647
customer campaigns so far in 2022/23

Providing up-to-date information is vital to our operations

This quarter, we promoted improvements to the Elizabeth line

Customer marketing and behaviour change campaigns

Elizabeth line campaign

Our campaign focused on new improvements to the Elizabeth line. Key messages included promoting through-running services into the Central operating section, the opening of Bond Street platforms, end of reduced operation hours and Sunday closures. We also highlighted the completion of step-free works at two remaining stations which will deliver on the initial goals of the railway.

The campaign informed Londoners that the Elizabeth line is now even better than before and promoted the Heathrow branch with price and journey time messaging.

We sought views from Londoners on walking and cycling in Chiswick

Consultations

We launched five consultations in Quarter 3:

- Chiswick High Road walking and cycling changes
- Park Lane walking and cycling changes
- Review of taxi (black cab) fares and tariffs 2022
- Silvertown Tunnel bus network proposals
- Battersea Bridge safety improvements scheme

We are planning to launch 22 consultations in Quarter 4 2022/23.

London Assembly scrutiny

These are the London Assembly scrutiny sessions that took place during Quarter 3 and those planned for Quarter 4. The London Assembly examines and reports on our work at regular committee meetings and other sessions to ensure we are meeting the objectives of the Mayor's Transport Strategy.

London Assembly scrutiny

Quarter 3

Date	Title	Type of scrutiny
11 October 2022	Transport Committee. TfL finances	Open meeting
13 October 2022	Mayor's Question Time	Open meeting
13 October 2022	GLA Oversight Committee. Pensions	Open meeting
20 October 2022	Environment Committee. Noise	Open meeting
10 November 2022	Environment Committee. Green Bonds	Open meeting
15 November 2022	Transport Committee. Rail reform	Open meeting
17 November 2022	Mayor's Question Time	Open meeting
29 November 2022	Fire, Resilience and Emergency Planning Committee. London's resilience	Open meeting
30 November 2022	Economy Committee. Cargo bikes	Open meeting

Quarter 4

Date	Title	Type of scrutiny
15 December 2022	Mayor's Question Time	Open meeting
4 January 2023	Budget and Performance Committee. GLA Budget	Open meeting
17 January 2023	Transport Committee. Public Transport fares in London	Open meeting
19 January 2023	Mayor's Question Time	Open meeting
23 February 2023	Mayor's Question Time	Open meeting
28 February 2023	Transport Committee. Road User Charging	Open meeting
23 March 2023	Mayor's Question Time	Open meeting
21 March 2023	Transport Committee. Commissioner question and answer	Open meeting

Our operations are scrutinised by the London Assembly

About us

Part of the Greater London Authority family led by Mayor of London Sadiq Khan, we are the integrated transport authority responsible for delivering the Mayor's aims for transport. We have a key role in shaping what life is like in London, helping to realise the Mayor's vision for a 'City for All Londoners' and helping to create a safer, fairer, greener, healthier and more prosperous city. The Mayor's Transport Strategy sets a target for 80 per cent of all journeys to be made by walking, cycling or using public transport by 2041. To make this a reality, we prioritise sustainability, health and the quality of people's experience in everything we do.

We run most of London's public transport services, including the London Underground, London Buses, the DLR, London Overground, Elizabeth line, London Trams, London River Services, London Dial-a-Ride, Victoria Coach Station, Santander Cycles and the IFS Cloud Cable Car. The experience, reliability and accessibility of these services is fundamental to Londoners' quality of life.

We manage the city's red route strategic roads and, through collaboration with the London boroughs, we are helping to shape the character of all London's streets. These are the places where Londoners travel, work, shop and socialise. Making them places for people to walk, cycle and spend time will reduce car dependency, improve air quality, revitalise town centres, boost businesses and connect communities. As part of this, our expanded Ultra Low Emission Zone and fleets of increasingly environmentally friendly and zero-emission buses are helping to tackle London's toxic air.

During the pandemic, we took a huge range of measures to ensure people were safe while travelling. This included extensive cleaning regimes across the public transport network and working with London's boroughs to introduce the Streetspace for London programme, which provided wider pavements and cycle lanes for people to walk and cycle safely and maintain social distancing. London's recovery is vital to the UK's recovery as life returns to normal. We want to ensure London avoids a car-led recovery and we continue to reassure people the capital and our transport network is safe and ready for them.

We have constructed many of London's most significant infrastructure projects in recent years, using transport to unlock much needed economic growth. This includes major projects like the extension of the Northern line to Battersea Power Station and Nine Elms in south London, as well as our work at Barking Riverside and the Bank station upgrade.

Working with the Government, we opened the Elizabeth line in time for Queen Elizabeth II's Jubilee. This transformational new railway adds 10 per cent to central London's rail capacity and supports the delivery of high-density, mixed-use developments, which are planned around active and sustainable travel to ensure London's growth is good growth. We also use our own land to provide thousands of new affordable homes and our own supply chain creates tens of thousands of jobs and apprenticeships across the country.

We are committed to being an employer that is fully representative of the community we serve, where everyone can realise their potential. Our aim is to be a fully inclusive employer, valuing and celebrating the diversity of our workforce to improve services for all Londoners.

We are constantly working to improve the city for everyone. This means using information, data and technology to make services intuitive and easy to use and doing all we can to make streets and transport services accessible to all. We reinvest every penny of our income to continually improve transport networks for the people who use them every day. None of this would be possible without the support of boroughs, communities and other partners who we work with to improve our services. By working together, we can create a better city as London's recovery from the pandemic continues.

March 2023

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Customer Service and Operational Performance Panel

Date: **22 March 2023**

Item: **Electrified Travel Devices (Micromobility)**

This paper will be considered in public

1 Summary

1.1 At the meeting of the Panel in March 2022, an update was sought on what was described as 'the rise of electrified travel devices' following a proliferation of new vehicle types being seen on London's streets. This paper provides an update on TfL's strategic approach to the issues raised and how it seeks to manage the risk to pedestrians.

2 Recommendation

2.1 The Panel is asked to note the update.

3 Background

3.1 Over the last five years, new vehicle types or transport devices have been seen on London's streets and around the UK. These have included e-scooters, electric skateboards and electric unicycles, the majority of which:

(a) are classified by the Department for Transport (DfT) as 'Powered Transporters'; and

(b) cannot be used legally on the public highway (meaning carriageways, footways, or segregated cycle tracks).

3.2 The emergence of these devices or vehicles (as well as the continued use of longstanding legal personal transport modes like bicycles and e-bikes) has led to the use of the catch-all term 'micromobility'.

3.3 Specifically for e-scooters, the legal status is more complex and not well understood by the public. It is legal to sell e-scooters and they are readily available from retailers. However, the only legal way to ride an e-scooter in the UK is by using e-scooters that are part of the rental trials enabled by the DfT. Privately owned e-scooters can only be used on private land.

3.4 For private e-scooters, electric skateboards and electric unicycles, there are no specific regulatory requirements or construction standards. As they are not legal for use on public highways, they do not have to conform to construction standards or pass roadworthiness tests like motor vehicles. As such, quality varies considerably across the products on offer, which may impact on the safety of these types of electric micromobility vehicles.

3.5 Two fires have occurred on TfL services when electric micromobility vehicles malfunctioned while being carried. The causes of the fires on our services appear to have been due to the absence of safety standards or battery specification. Electrical and battery safety is not the only concern. Some of these vehicles can be poorly constructed, and speed limiters that are intended to cap how fast they can travel can be over-ridden.

3.6 TfL's position on all private micromobility vehicles that are illegal for use on public highways is not to endorse or support them and to remind people of their legal status. The Metropolitan Police Service (MPS) has TfL's full support in all enforcement activities relating to illegally used vehicles. TfL introduced a ban on e-scooters and electric unicycles on TfL services or premises, to guard against the potential for electric fires. This ban is under constant review in conjunction with the London Fire Brigade.

3.7 There is a clear delineation between private and rented e-scooters in terms of legal status. Now that they are widely available, e-scooters that can be purchased and owned privately appear to be selling in large quantities – especially the cheaper, more poorly constructed models – and are being used widely in public despite the illegality of doing so. We have made it clear in our communications that the e-scooter rental trial (described later in this paper) is currently the only legal way to ride an e-scooter in London, and the Mayor's Cycling and Walking Commissioner has been a co-signatory with the MPS on a number of occasions to retailers (primarily of e-scooters) to remind them of the need to inform their customers of the legal status of the products they sell.

3.8 E-scooters have become highly popular in other countries (albeit with accompanying inconsistencies in legal frameworks and statuses), with several operating companies springing up and scaling rapidly to offer rental schemes (mostly in cities) where large fleets of e-scooters are parked in the streets and made available to hire by the minute via the operator's mobile application. By contrast, devices like electric unicycles and electric skateboards have remained considerably more niche.

3.9 To support a 'green' restart of local travel and help mitigate reduced public transport capacity, in July 2020, the DfT made regulations allowing trials of rental e-scooters to be established, with usage data collected to provide evidence on key policy areas such as road safety. All trial proposals had to come from local authorities. The DfT also issued vehicle orders under s44 and s63(5)-7 of the Road Traffic Act 1988 for vehicles of particular operators assessed as being suitable to participate in trials.

3.10 As the largest and most complex urban environment in the country, the biggest potential market for any future rental sector, and given the Mayoral commitment to Vision Zero, it was agreed that London should demonstrate a safety-first approach with a centrally contracted and co-ordinated multi borough trial to contribute evidence to the DfT and ensure we could contribute views while any legislative approach by the DfT was formulated, with the goal of enhancing safety, and proving the benefit of a unified approach to contracting these services in a major city with multiple local authorities.

3.11 This paper describes the resultant London e-scooter trial, how that trial differs from other micromobility rental schemes run in London using bikes and e-bikes, TfL's current overall strategy and policy work on micromobility and what is currently known about plans for legislation in this area. For completeness, TfL is not aware of any indication to date that the DfT is currently interested in running trials or reconsidering the legal status of the other types of electric micromobility vehicle mentioned earlier in this paper that are currently illegal for use on public highways (for example, electric unicycles).

4 Current position and TfL Strategy

London e-scooter trial

4.1 Following the 2020 announcement about e-scooter trials, TfL and London Councils set about establishing a group of London Boroughs that were willing to co-host a TfL contracted e-scooter trial. We then initiated a competitive process to select operators to run it.

4.2 A 'safety-first' approach was taken to developing the specification for the trial against which prospective operators would bid which included mandatory training for new riders, additional vehicle features such as lights that stay on throughout rentals and unique vehicle identification numbers both being displayed and linked to the operational data collected. The use of geofencing to restrict parking to agreed locations was mandated, and geolocation technology was also required to slow vehicles down to a lower speed limit where required by the local highway authority. Alongside the development of the specification, TfL carried out engagement with groups representing people with protected characteristics to ensure that their concerns were considered as part of the trial and continues to do so. This led to the development of an Equality Impact Assessment, which was published on TfL's website and is kept up to date.

4.3 The operators selected were Dott, Lime and Tier, and the trial launched in June 2021, with five London boroughs and 600 e-scooters operating at a lower speed limit than the national maximum (12.5mph instead of 15.5mph). The trial grew to become one joined up riding zone, in August 2021, when Westminster joined, linking the initial participating boroughs to the east and west. There are now 10 boroughs participating: Richmond, Ealing, Hammersmith & Fulham, Royal Borough of Kensington & Chelsea, Westminster City Council, Camden, City of London, Lambeth, Southwark and Tower Hamlets (including the Canary Wharf estate).

4.4 The fleet size has grown to over 4,500 scooters and there are now over 500 parking bays. There have been over 2.25 million trips, covering more than five million kms, and London now has the largest trial in the UK. To date there have been 25 serious injuries and no fatalities. The latest trial statistics can be found on our website, and a map of the current trial area is shown below.

4.5 TfL's operator contracts are currently being re-tendered, after the DfT permitted trials nationally to be extended to 31 May 2024. This re-tender has enabled us to go further on safety, specifying minimum wheel sizes for the first time to improve rider safety when navigating imperfections in road surfaces. We have been able to approach this re-tender with the benefit of everything that has been learnt operationally since the trial launched. It will also enable us to see how effective emerging technology can be, for example in detecting when e-scooters are being used on pavements.

4.6 It is not yet possible to say what the future of e-scooter rental in London looks like, because there has not yet been confirmation from the DfT as to what will happen with trials beyond 31 May 2024. There could be further extensions, or legislation may be introduced that changes the legal status of privately owned e-

scooters which could alter rental arrangements. However, TfL would wish to ensure that in respect of any future rental schemes, it could continue to contract with operators that have robust safety credentials.

Bike and e-bike rental

4.7 As noted above, a long-standing mode of transport which has been included in the definition of micromobility is cycling, and private sector dockless bike and e-bike rental is now prevalent in some areas of London. Cycle hire is outside the scope of this paper, but dockless bike rental is relevant to this paper given the potential impact that badly managed schemes can have on the public realm and pedestrian safety, and the differing regulatory arrangements compared to the e-scooter trial.

4.8 Whereas rental e-scooters can only be used in London as part of the London trial, there are no controls around bike and e-bike rental (either in London or elsewhere in the UK). As such, TfL has no direct control over the dockless bike market and has no say over which companies provide rental bikes, in which parts of London, or to what standards – even though in most cases the rental bikes are provided by the same companies as our e-scooter fleets.

4.9 As a result, local arrangements for dockless bike rental tend to be made between individual London borough councils and operating companies (though even this is not a legal requirement). Given the varied approaches of different boroughs, these local arrangements have led to a patchwork of different bike rental options across London. This causes difficulty because the local expectations and requirements that are sought by different boroughs lead to confusing situations for customers. For example, in some boroughs it is not possible to hire an e-bike whereas in other boroughs there are up to four different companies to choose from, some boroughs require parking on the carriageway, some allow parking on the footway, some use marked bays, some allow bikes to be left anywhere and some have a hybrid of all these elements.

4.10 This often leads to dockless bikes being left near the end point of the last rider's journey, often having an impact on the accessibility of the public realm. For consistent parking arrangements to be made, to get the best out of these active travel rental services and ensure the public realm is not negatively impacted by their implementation, a centralised approach to scheme design is needed. The DfT's decision to enable TfL to design and contract with providers for the e-scooter trial for London has enabled this, and we hope that in time it will be possible to take a comparable approach with bike rental too.

TfL strategy/policy position

4.11 TfL has been considering the future of micromobility in London in relation to both rental services and vehicle standards. Based on the experience to date of contracting and managing the e-scooter trial (while having no direct control over the rental e-bikes from the same companies), we have worked with other local authorities, and strategic transport authorities around the UK to develop policy proposals for how legislation might enable these markets to be unified in future.

4.12 The work done with other local authorities was compiled and published by the Urban Transport Group (UTG) in March 2022. This work made the case that in respect of all major prospective urban micromobility rental markets, three key elements of control were likely to prove essential irrespective of the vehicle type being rented out:

(a) enabling cities to tailor rental services to suit their local circumstances;

(b) accessing operator usage data; and

(c) ensuring effective interaction between strategic transport authorities and local authorities.

4.13 While the timing for any new legislation is not yet known, the DfT's response to the above proposition was favourable, and initial plans for new legislation outlined by the government in May 2022 suggested that there was consensus that this approach represented a sensible way forward. On this basis, TfL is considering how the future London micromobility rental market may be able to evolve if new powers for TfL are granted.

4.14 In relation to vehicle standards for as yet unregulated electric micromobility vehicles, our focus has been on recommendations for e-scooter safety, both in terms of construction and use. The work on recommendations for e-scooter vehicle standards was also developed in partnership with other city authorities and published by the UTG.

4.15 The published recommendations focussed on the construction of e-scooters as well as requirements for riders – irrespective of whether the vehicles are rented or privately owned. The full recommendations can be found in UTG's report, 'The future of e-scooters'. To summarise, it was recommended that if all e-scooters are to be fully legalised for use on UK highways:

(a) the DfT should set rigorous construction and technical standards at national level, as for other vehicle types; and

(b) there should be national minimum requirements around the use of e-scooters in terms of their use on the highway (and which parts specifically), and it would be essential to state what offences would apply for riders in relation to enforcement, where establishing first principle requirements around licensing and vehicle registration were likely to be key.

4.16 The main safety risks that these recommendations address include danger to riders, pedestrians and other road users in terms of collisions, falls, head injuries; fires caused by defective batteries; harm to walking, cycling and the urban realm; waste from ruined vehicles; increased highway maintenance costs and difficulty in stopping vehicles for enforcement and crime prevention.

Proposals for legislation

4.17 As stated above, the timing for any new legislation is not yet known. However, in 2022, the DfT explained that to address the legality of e-scooters, the intention was to create via new primary legislation a new class of traffic called low speed zero emission vehicles (LSZE). At the same time, powers would be created to

enable the Secretary of State to be able to make regulations relating to vehicles that will be defined as LSZE so far as their construction and use is concerned, and separately, controls around how they are rented out.

4.18 By creating a new class of traffic rather than referring to e-scooters explicitly on the face of the primary legislation, there would potentially be scope for a range of vehicles to occupy this class, in time. Each would be able to have its own bespoke requirements for roadworthy construction, and details could be specified about what is required of the rider, driver or operator (as the case may be) of the vehicle type in question. TfL supports this approach, subject to the safety standards that are introduced being sufficiently robust.

4.19 In relation to the rental of these vehicles, we understand that permission would need to be sought for rental schemes to commence, to avoid an unlicensed market which would negatively affect the urban realm. We understand that dockless bike rental would also be included in these arrangements, not because bikes and e-bikes are to be reclassified as LSZE, but due to the similarities between app based rental schemes. No details have yet been published, however we believe that the intention is for new powers to sit at local transport authority level.

4.20 TfL is in favour of legislation being progressed and is keen to work with the DfT to ensure the detail enables arrangements to work well in practice. We hope that an introductory date can be agreed soon to establish much needed regulatory safeguards around vehicle standards and the rental market, and to enable TfL and London boroughs to do any requisite preparatory work as highway authorities for a newly legalised vehicle type arriving on London's streets.

5 Financial Implications

5.1 Similarly, it is not yet clear what the financial implication for TfL may be. TfL has incurred some cost in establishing the e-scooter trial and so have the participating London boroughs. A structure of operator charges accompanies the trial and pursuant to this, under the associated contracts, the operators make a financial contribution towards administrative costs of the trial, as part of their tenure as e-scooter rental service providers in London. With dockless bike rental, all arrangements are made directly between operating companies and individual London borough councils. Whether and how this may change in the future, and with what affect, is not yet known.

List of appendices to this report:

None

List of Background Papers:

None

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Customer Service and Operational Performance Panel

Date: **22 March 2023**

Item: **TfL International Benchmarking Report 2023**

This paper will be considered in public

1 Summary

1.1 The purpose of this paper is to provide a high-level overview of TfL's customer delivery performance against international benchmarks.

1.2 The paper highlights successes as well as areas for improvement, and signposts subjects for potential benchmarking focus in 2023 and beyond.

1.3 The report also provides a summary of key operational benchmarking groups that TfL are members of, and how outputs are utilised to help drive value for money and improved service performance.

2 Recommendation

2.1 **The Panel is asked to note the paper.**

3 Key Findings

3.1 The report is structured thematically around two of the themes set out in the Mayor's Transport Strategy, with an additional focus on the impact of the coronavirus pandemic (as the key data sets review the previous one to five years). Key findings are set out below.

Pandemic Recovery

3.2 Demand continues to be impacted by the aftereffects of the pandemic and remains lower than it was prior to 2019. However, over recent months London has shown strong resilience and is recovering in line with most of its peers. Transport remains at the forefront of the capital's recovery and by continuing to provide for the needs of its people we can ensure that demand returns and grows.

3.3 The pandemic had a significant impact on our finances. Like many public transport providers around the world, TfL received funding support from central Government to help mitigate the loss of revenue from depressed ridership. Whereas many cities' transport networks temporarily (and in some cases permanently) reduced service levels to improve their overall financial position, TfL has broadly maintained its operations to support Londoners and the UK overall. This was especially the case during the early part of the pandemic, where TfL was able to deliver sufficiently high services levels to enable key workers to travel safely across our network.

3.4 London has led the way in providing an example of how to achieve financial sustainability in the past and continues to perform well against peers despite the current challenges.

A good public transport experience

3.5 In general, the level of capacity on the network (and subsequent crowding levels) is less of a concern across transport networks at present due to dampened demand versus 2019. Despite the impacts of the pandemic, we have recently added capacity to the network that illustrates the significant benefits of investing in major public transport projects, e.g. The Northern Line Extension and Barking Riverside Extension have provided fast and reliable public transport for areas of London that previously didn't have easy access to the TfL network, improving overall TfL ridership and promoting the transfer of car trips to Tube and rail modes. These exciting developments, were complimented by the recent redevelopment of Bank station. In addition, the opening of the Elizabeth line in May 2022, which has added 10 per cent rail capacity and has created new journey options from people from London and the Southeast. Our benchmarking partners across the world continue to push forward on a number of high-profile capacity schemes. Long-term investment in public transport remains a key strategic priority (and risk) for all of the benchmarking groups highlighted in the paper, with the development of a strong case for investment a key area of focus for the years ahead.

3.6 Reliability across our networks is within the same performance range as transport providers that face similar structural factors as London, e.g. older networks from Europe and North America. However, there are members of our benchmarking groups the perform particularly well with similar constraints to us which we can learn from, especially in terms of delays relating to staff availability.

3.7 In terms of accessibility, we perform well on DLR and Elizabeth line, as well as on our Buses. Structural factors and levels of investment continue to constrain London Underground - with other older metros from around the world facing similar challenges - but progress has been made in recent years to improve step-free journeys across the network.

Healthy Streets and healthy people

3.8 Safety remains our top priority at TfL. Performance remains good when compared to peers, however, there is still more work to be done to be industry leading and achieve Vision Zero.

3.9 Active Travel has seen large increases over the last decade. Our cycling investment has led to the highest, safest and most inclusive levels of cycling on record. Significant expansion of the cycling network means that 22 per cent of Londoners now live within 400 metres of our Cycleways network. We have also invested heavily in our Healthy Street signals programme to prioritise sustainable modes at traffic signals and borough roads, saving over 12,000 hours every day for people walking, cycling and using the bus. The business plan secured short-term funding to further progress in this area, and TfL will continue to review progress and learnings from other cities to better inform its plans in this area.

3.10 London is at the forefront of a global drive to make cities more sustainable and environmentally friendly, and we perform well against our peers – continued delivery of our Corporate Environment Plan and supporting initiatives will ensure that we continue to set the pace for reducing carbon emissions. This is an increasing area of interest among international peers and an area of benchmarking that will be developed further.

List of appendices to this report:

Appendix 1 – TfL International Benchmarking Report

List of Background Papers:

None

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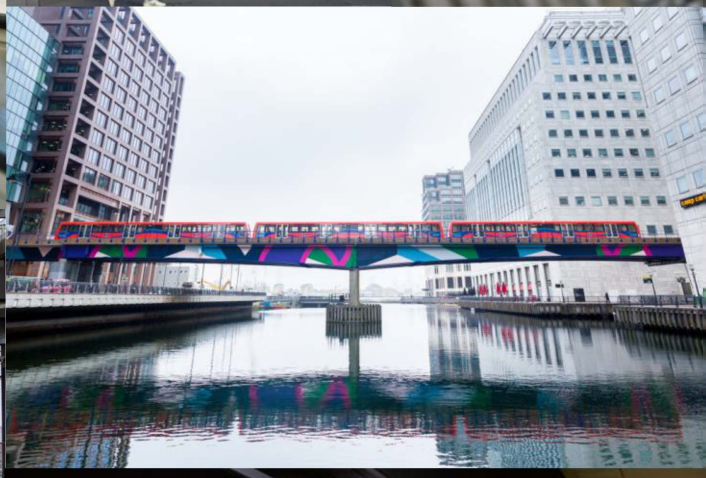
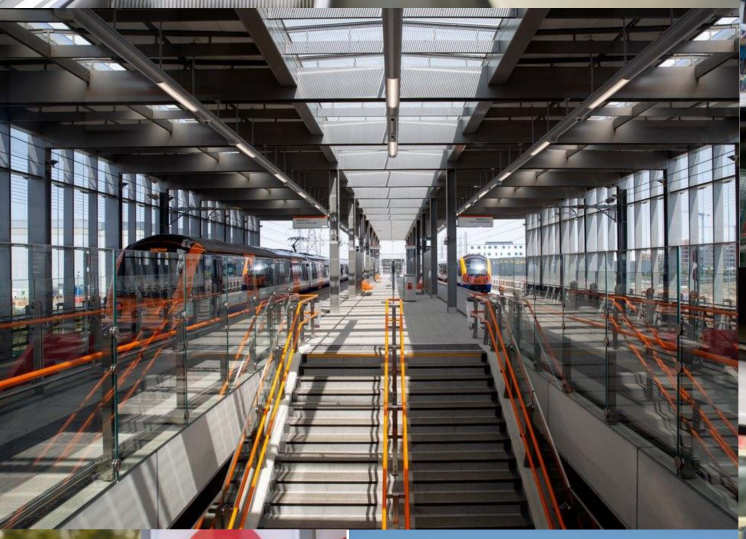
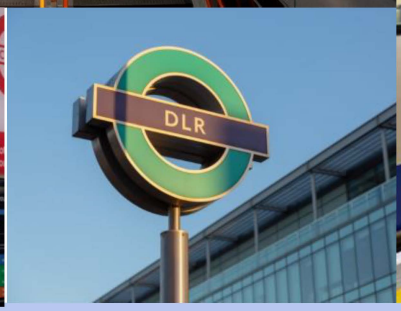






TfL International Benchmarking Report 2023

Contents

Purpose of the report

Benchmarking TfL's customer service and performance against best in class

The TfL International Benchmarking Report provides a high-level overview of performance in customer-centric areas against domestic and international benchmarks. The report highlights positive performance trends, areas for improvement, as well as signposting future benchmarking opportunities.

The report also provides a summary of how benchmarking is undertaken at TfL, and how outputs – through the identification of best practice, monitoring trends, and better understanding drivers of performance – provide an important source of information to support planning and decision-making.

We benchmark to support delivery of the TfL Business Plan

This is our first International Benchmarking Report since late 2018. The first section of the report looks at how transport networks around the world were impacted by the coronovirus pandemic and how they recovered in recent years, with a specific focus on levels of demand and financial sustainability. The report then considers the key outcomes of the TfL Business Plan, with benchmarking data structured around two of the three core themes of the Mayor's Transport Strategy (MTS) – 'A good public transport experience' and 'Healthy Streets and healthy people'. The paper does not cover the MTS theme of 'New homes and jobs', as benchmarking data is currently very limited in this area.

NEW: Pandemic recovery

MTS: A good public transport experience

MTS: Healthy Streets and healthy people

The report aims to provide an effective comparison of TfL against best-in-class benchmarks. Every effort has been made to be as comprehensive as possible in our coverage of our Business Plan, however, when reading the report it is useful to note the following:

- **The report looks at historic trends only to 2021/22:** the latest data available
- **The outcomes that TfL monitor on its scorecard are often different to those benchmarked:** common metrics are adopted by benchmarking partners to provide comparable data across a range of networks. These allow an effective way to review trends and performance
- **Most of the data sets used come from well established, structured benchmarking groups:** where data is less mature we note this and will look to improve benchmarking maturity
- **Some topic areas are more easily compared than others:** traditional operational metrics such as demand and reliability are well established, whereas benchmarking for emerging strategic priorities is less developed and/or available, e.g. the environment
- **The pandemic has impacted the benchmarking process itself:** new priorities have emerged to deal with short-term challenges, significant organisational and service levels changes provide new contexts to trends, and limited resources have constrained some members involvement

Despite these challenges, the benchmarking that takes place across TfL still enables us to draw meaningful comparisons to many cities across the world and the opportunity to learn from others.

How do we benchmark?

We collaborate with a wide range of organisations

Benchmarking within TfL takes many different forms. At one end of the spectrum, TfL maintains strong bilateral relationships with organisations that allows for regular and often more detailed collaboration. Examples include the Transport Infrastructure Efficiency Strategy (TIES) group, which includes Network Rail and National Highways; the International Association of Public Transport (UITP); and Imperial College London supported public transport benchmarking groups (summarised later in the report). More informal and/or standalone benchmarking opportunities also exist, and TfL participates where it is beneficial to do so, even if it is just openly sharing data for third party reports.

An overview of benchmarking maturity

Benchmarking is most mature in respect of London Underground (LU), Docklands Light Railway (DLR), London Overground (LO) and the London Buses network, where we are long-standing members of international benchmarking groups. These groups provide a rich historic data set, covering a wide range of operational and business outcomes. For the purpose this report we have therefore predominately focused on these groups.

Mode	Affiliation to International Benchmarking Group	Access to Annual Performance Data and Case Studies	Coverage					
			Financial	Demand	Public Transport Provision	Accessibility	Safety	Carbon & Green
London Underground	Community of Metros (COMET): Founding member 1994	Approx. 100 to 300 performance measures per group annually recorded. 3 to 8 detailed case studies per year (depending on mode).	✓	✓	✓	✓	✓	✓
DLR	Community of Metros (COMET): Member since 2013		✓	✓	✓	✓	✓	✓
Overground	International Suburban Rail Benchmarking Group (ISBeRG): Founding member 2010		✓	✓	✓	✓	✓	✓
Buses	International Bus Benchmarking Group (IBBG): Founding member 2004		✓	✓	✓	✓	✓	✓
Walking and Cycling	European Metropolitan Transport Authorities (EMTA)	Ad hoc reports	X	X	✓	X	X	X
Roads	No	No	X	X	X	X	X	X
Trams	No	No	X	X	X	X	X	X

Benchmarking in the following areas is currently less mature, with fewer comparators available:

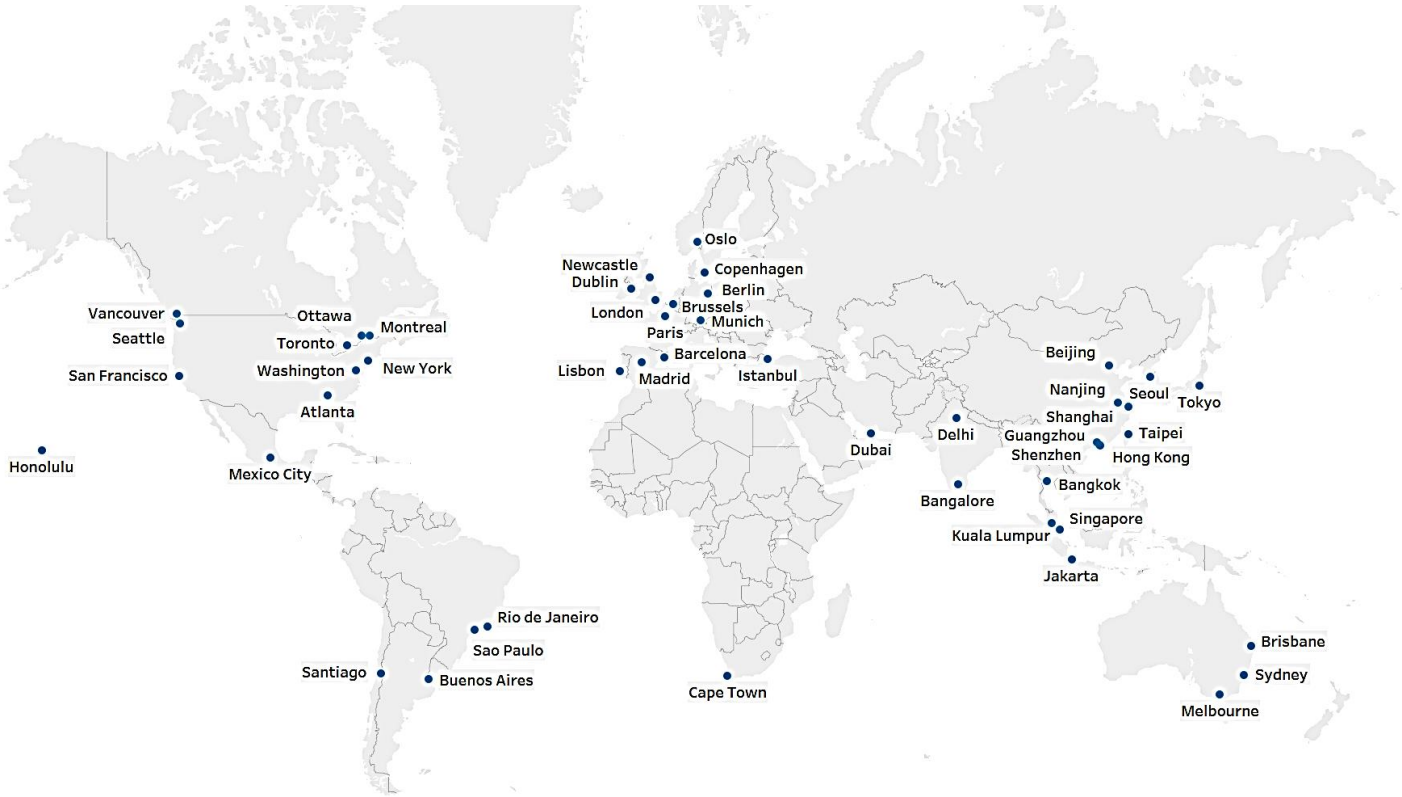
- **Trams** – Imperial College London have recently formed a new international trams benchmarking group. TfL is not currently a member but will continue to assess its position over time.
- **Elizabeth line** – The line recently joined ISBeRG in 2022 but has not provided data into the groups annual KPI system as yet (the next opportunity being Summer 2023).

While benchmarking coverage may not be 100 per cent across all aspects of TfL operations, by concentrating on the Underground, DLR, Overground and Buses we are still able to cover a significant proportion of public transport journeys made within London.

Benchmarking groups

Case Study: A focus on the Transport Strategy Centre (at the Imperial College London)

TfL participate in three modal-specific benchmarking groups that are administered out of the Transport Strategy Centre (TSC) at Imperial College, London. These are: COMET (Community of Metros), IBBG (International Bus Benchmarking Group) and ISBeRG (International Suburban Rail Benchmarking Group). In total, these groups include over 70 members across a number of major cities throughout the world:



A note on the presentation of data and confidentiality rules

The majority of the data outlined in this report is supplied via our collaboration with the TSC (Imperial College London). Graphs relating to the Underground are shown in DARK BLUE, LIGHT BLUE for DLR, ORANGE for the Overground, and RED for London Buses.

On certain graphs we have added arrows to clearly illustrate better or worse performance (coloured green and red respectively).

Operators agree to share confidential information about their organisations to allow members to benchmark performance. To respect the confidentiality of these third parties, we are required to report their data in an anonymised form, without any specific reference to individual networks.

Due to additional commercial sensitivities, the Bus benchmarking group – IBBG - also includes a stipulation that data sets are indexed against the average performance across all members.

Structural considerations

The impact of structural factors when comparing across networks

It is important to consider differences such as city wage rates, density of population, age of infrastructure, ownership of infrastructure, government grants, and health and safety standards when comparing our network with other cities, many of whom exist in very different environments.

These are known as structural factors, and are often very difficult to change without significant investment or reform. Structural factors are most likely to impact financial metrics but can also affect (albeit to differing degrees) every metric used in this report, in some cases making TfL look better in comparisons to others, and at other times, worse. Our benchmarking groups look to adjust for structural factors where possible and undertake deeper analysis within case studies (and other activities) to learn more about the structural factors that impact performance.

Example: Structural factors between London Underground and other COMET members

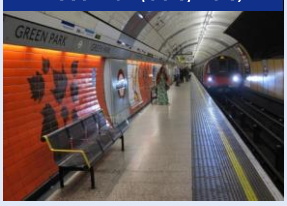
Age and construction practices

As the world's first metro, the Underground has a range of infrastructure and asset types. There are a number of older metros similar in this regard, e.g. New York and Paris, but many newer metros, especially those in Asia, are nearly entirely built using modern infrastructure and technologies:

Sub-Surface lines 19th century

Deep tube lines Early 20th century

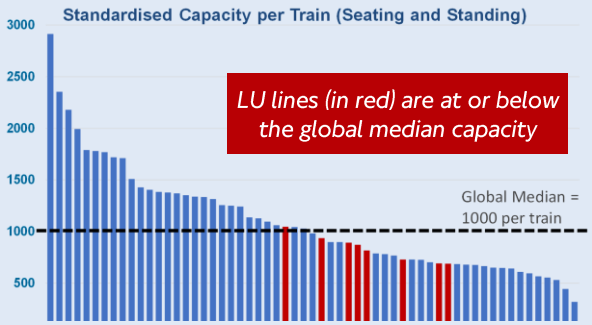
Victoria / Jubilee lines Post-war (60's/70's)



Modern extensions

Length of network and capacity

When we consider the Underground in the context of global metros, we see that it is one of the longest networks but is below the median for COMET group in terms of volume of passengers. This difference reveals a key structural factor in London compared to other networks - that it has a small structural capacity and low overall density (due to small tube tunnels and trains):



UNDERGROUND

Average line length: 47km

Max distance from city centre: 40km

Hong Kong MTR

Average line length: 26km

Max distance from city centre: 28km

RATP

Average line length: 15km

Max distance from city centre: 13km

Wider, non-structural factors, can also have an impact on the way transport is operated, such as macro-economic circumstances and varying national cultures.

All of these examples help to demonstrate the varied nature of transport networks and the complexity of reviewing data across different locations. We have tried to review the data objectively across this report, outlining any factors that may affect a particular graph to the reader's attention.

Why do we benchmark?

To improve our business

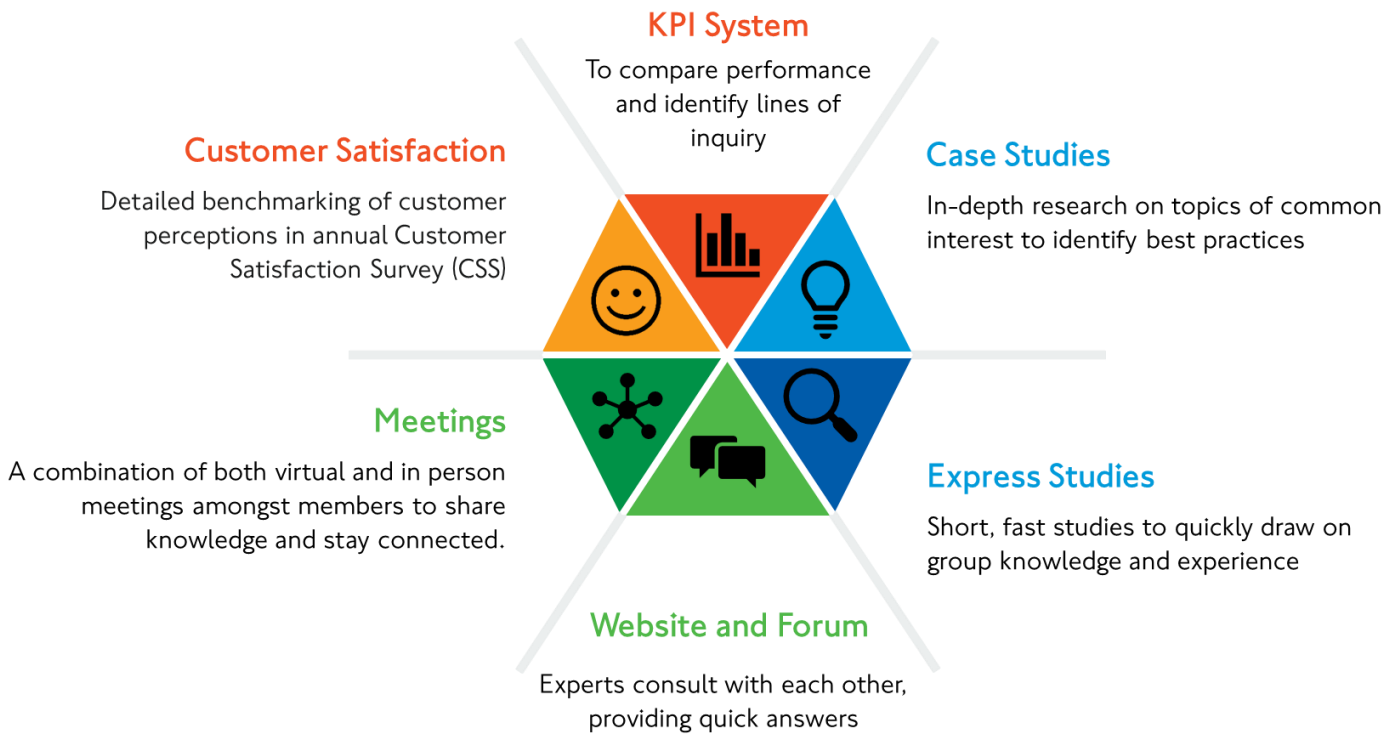
We are committed to improving value for money, year-on-year. Benchmarking is an important element of this, helping to identify best practice, prompt innovation, monitor trends and better understand the drivers of performance.

To inform our stakeholders

Customers and stakeholders have a keen interest in understanding whether funds are efficiently and effectively invested, and that the service we deliver helps London function and grow.

To provide a wealth of information that can support us in many different ways

The benchmarking groups that we participate in provide a wide range of historic and new information sources, including: ad hoc reports on important 'subjects of the day', annual Key Performance Indicator (KPI) reports, detailed case studies, group workshops and access to transport experts:



Source: Based on the TSC COMET Benchmarking Framework *(may differ by group)*

TfL has a good track record of utilising this benchmarking to enhance its operations and support the delivery of the TfL Business Plan. The benefits of benchmarking tend to be focused on two main areas:

1. It enables TfL to better respond to short-term operational challenges. The recent pandemic, with its various novel challenges, was a good example of this. TfL was able to engage with transport networks quickly and collaborate effectively on numerous topics such as the introduction of new anti-viral products, operational training during social distancing, mask compliance and so on.

2. Case studies, workshops and annual KPI reports present more longer-term, strategic opportunities and an insight into best practice. Recent examples include the Sustainable Fares and Funding, and Fare Evasion case studies in metros, both of which are being considered as part of developing our future plans and strategies in these areas.

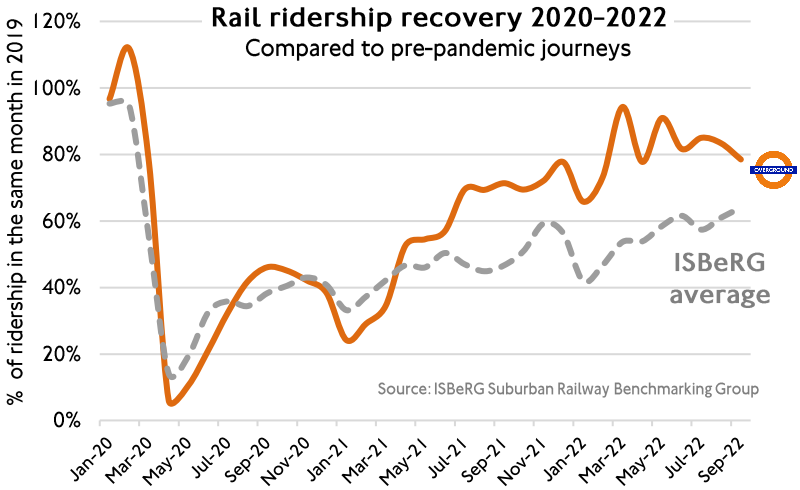
Pandemic recovery

Demand trends & financial sustainability

Public transport demand

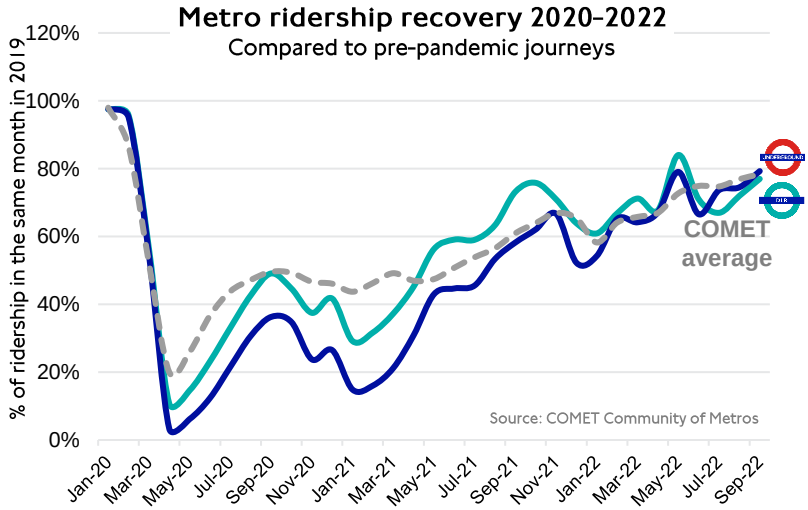
The graphs below show the percentage of demand as a proportion of pre 2019 levels (based on the latest international data available). In general, 2022 has seen a global recovery of public transport, with ridership levels growing throughout the year to their highest levels since 2019.

International comparisons in demand by mode (2019 to 2022)



Suburban rail demand grew in 2022 but lags behind 2019 levels. By September 2022, average ISBeRG group demand reached 60 per cent of pre 2019 levels, compared to 80 per cent on London Overground.

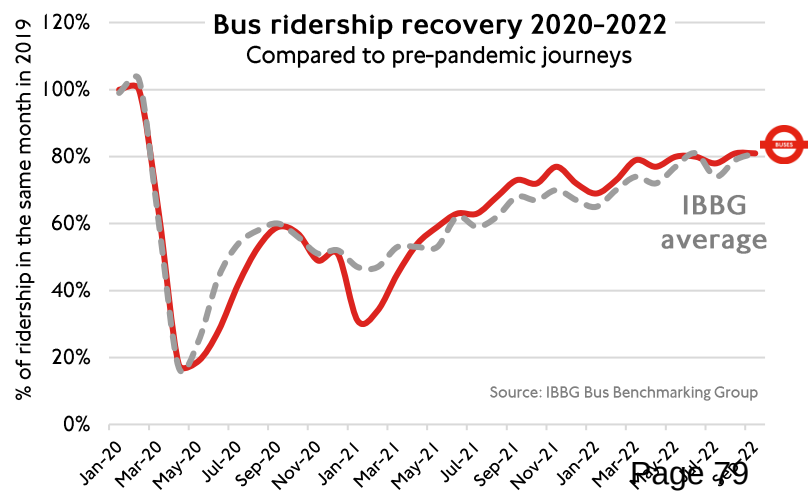
The Overground is one of the smaller networks in ISBeRG with shorter average journeys at lower speeds between closer stations, but at relatively high capacity utilisation – similar to a metro. It is therefore perhaps unsurprising that demand has recovered more strongly than some peers, as commuters seem to be making fewer journeys to/from suburbs to city centre offices.



London Underground ridership has been more impacted than DLR throughout the pandemic.

Both networks saw larger than average initial falls in ridership compared to global peers, but similar falls were seen across most European and North American metros during this time.

Since 2022, both the Underground and DLR have been closely tracking the COMET average, now at around 80 per cent of 2019 levels. But demand is lower than all European peers who have typically seen demand recover to around 90 per cent of pre 2019 levels by September 2022.



London bus ridership has closely tracked the IBBG group average throughout the pandemic. Ridership has now recovered to 81 per cent of pre-pandemic journeys.

London bus demand took slightly longer to recover after the first virus wave than IBBG peer cities, but had recovered to 60 per cent of 2019 ridership (the IBBG average) by September 2020.

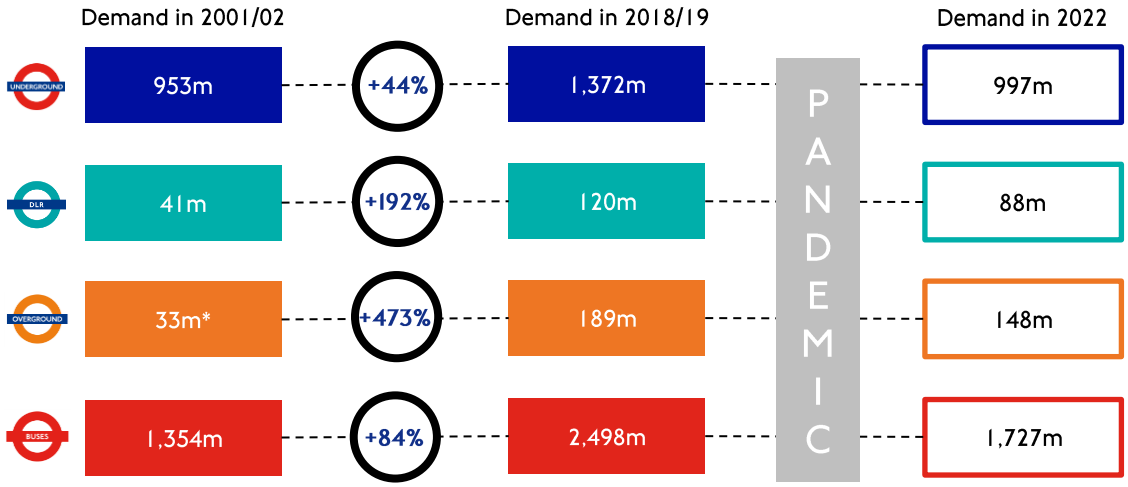
The early 2021 coronovirus wave saw a smaller drop in passengers compared to the first wave, but a significantly bigger drop compared to peer cities.

Public transport demand

Historic growth in demand (pre-2019)

The impact of the pandemic on demand should be considered within the context of the longer-term trend since 2000. Demand for TfL services, as measured by passenger journeys, grew significantly between 2000 and 2018. TfL modes experienced record high levels of ridership during this time, with demand significantly outstripping capacity at numerous locations across London (largely during peak hours):

Changes in demand (passenger journeys)



* TfL London Overground services started in 2007/08

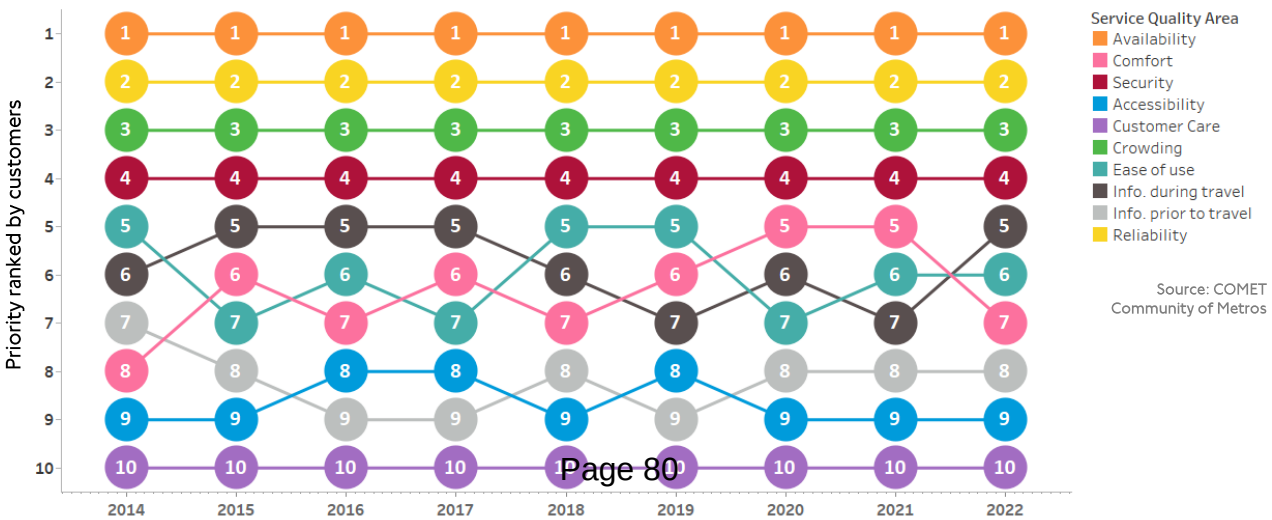
Source: TfL data

In a recent COMET study on 'Demand recovery following COVID', most members cited that they believe that the recent depression in ridership is temporary, and that customer demand will return to, or surpass, pre-pandemic levels in the medium-term, i.e. the next 5 years plus. Very recent data in early 2023 supports this view, with many members of the TSC benchmarking groups now consistently seeing in excess of 80-90 per cent of 2019 ridership levels on their networks.

Focus areas to support demand recovery

Despite fluctuations in demand, customer priorities have remained largely static over time. The chart below shows the top ten Underground customer priorities since 2014, taken from the TSC International Customer Satisfaction Survey. Availability, reliability, crowding and security/safety have remained the top four priorities for this entire period, illustrating the importance of getting the basics of our services performing well. This trend is similar to other TfL modes and transport networks more widely.

Service quality area priorities – ranked (London Underground) 2014-2022



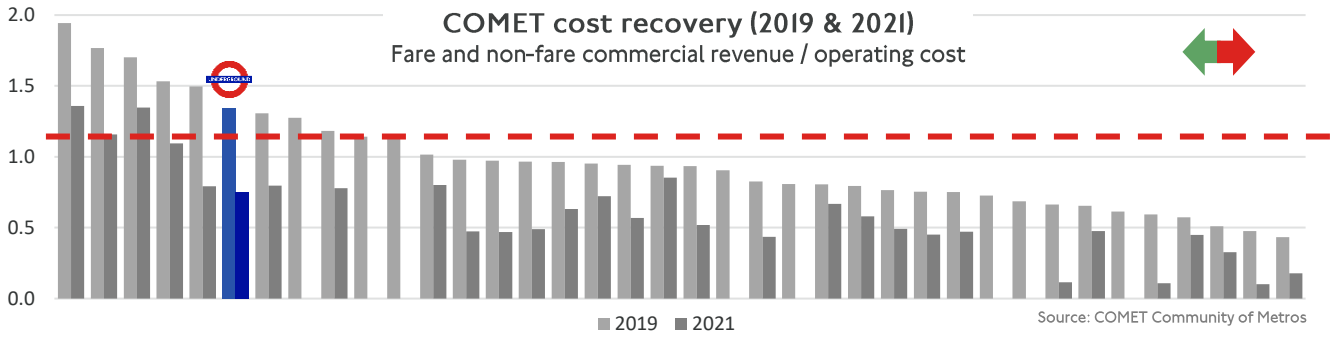
Source: COMET Community of Metros

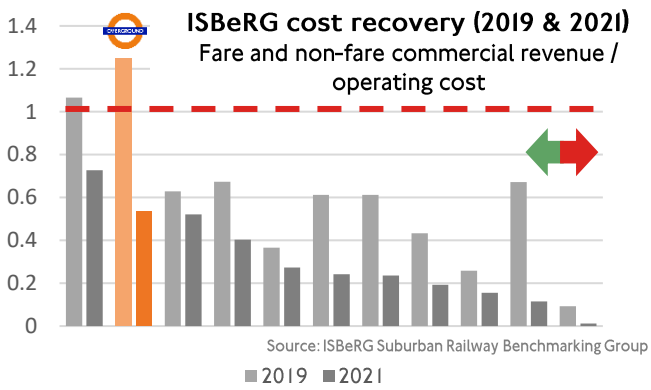
Financial sustainability

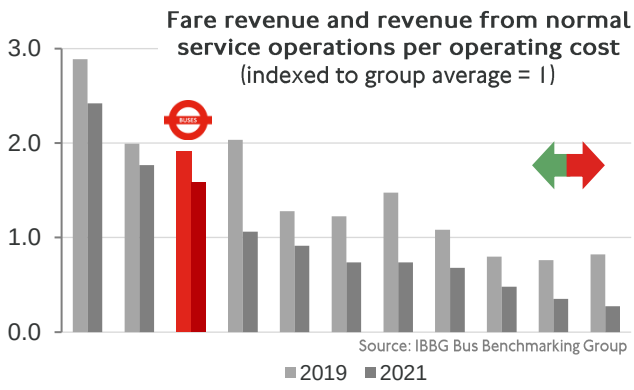
The pandemic had a detrimental effect on our finances. Fares revenue, our largest source of income, was significantly dampened during the period whereas operating costs increased due to the introduction of new cleaning regimes and the requirement to support London by operating a full service. It remains one of our financial aims to fully cover operations and maintenance expenditure, including the cost of financing, through income. But we must achieve this without compromising safety or reliability.

How are we performing?

A good indicator of financial sustainability is operating cost recovery. That is revenue (excluding concessionary fare subsidies) divided by operating costs. Prior to 2020, TfL was making good progress towards financial sustainability, consistently ranking amongst the best performing operators across the TSC groups. DLR does not have 2021 data due to resource constraints, but it has also historically performed well in this area.







The red line on each chart represents the point when total operating costs have been recovered by revenue (apart from the bus graph, where the recovery ratio is indexed against the group average). All members across the TSC groups have seen an impact on their recovery ratio as a result of the pandemic, with many, including the Underground and Overground, no longer being able to cover their operating costs. In fact, in 2021, only four TSC benchmarking members returned a recovery ratio over one (all of which were metros outside of Europe).

Supporting the TfL Business Plan

Prior to 2020, all TfL modes were amongst the highest performers for recovery ratio and were delivering gradual improvements over time. The TfL Business Plan sets out our strategy for rebuilding our finances, improving efficiency and helping to secure our future, with an overall aim to achieve operational financial sustainability by April 2024.

Our approach to achieving operational financial stability will include many different elements. Research from the TSC groups highlight three key areas for focus, other than more technical financial mechanisms such as borrowing and cash levels. First, to find ways to actively encourage customers back onto the network through improved service levels and/or fares structures. Second, the creation of new sources of revenue to reduce the overall reliance on fares income. Thirdly, by continuing to deliver recurring cost savings and efficiencies (embedding this into the culture of the organisation).

Fares

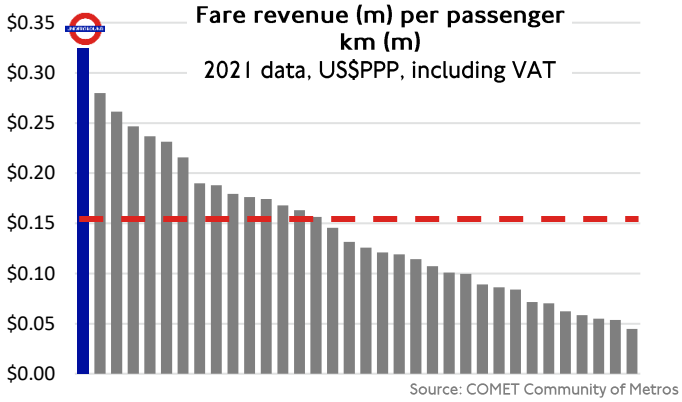
We reinvest all of our revenues in operating and enhancing our services, but we must provide affordable services to our customers – fare levels should not be a barrier to travel on public transport. This section shows the average fare revenue per passenger kilometre, adjusted for local purchasing power (in US Dollars).

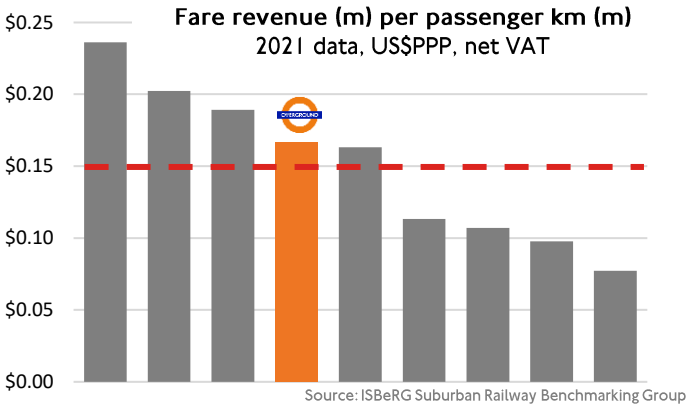
How are we performing?

TfL receives less operating subsidy support from government than other cities and zero grant in the years pre pandemic. As a result fares contribute a far higher percentage of our income compared to the majority of our peers.

TfL has received several packages of pandemic related financial support from the UK Government. More recently, TfL also received a longer term funding deal which includes a condition of achieving operational financial sustainability by 2024. The deal set out an assumption that TfL would raise fares in both in 2022/23 and 2023/24.

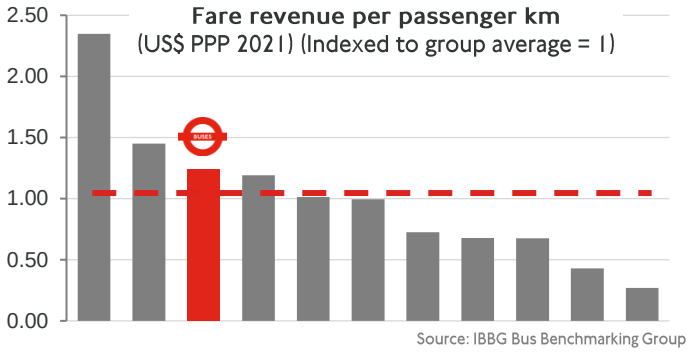
Fares are a key contributor to overall financial sustainability, supporting the cost of day-to-day operations as well as contributing to the delivery of key asset renewals and capital investment, both of which are crucial to maintaining and enhancing our network.





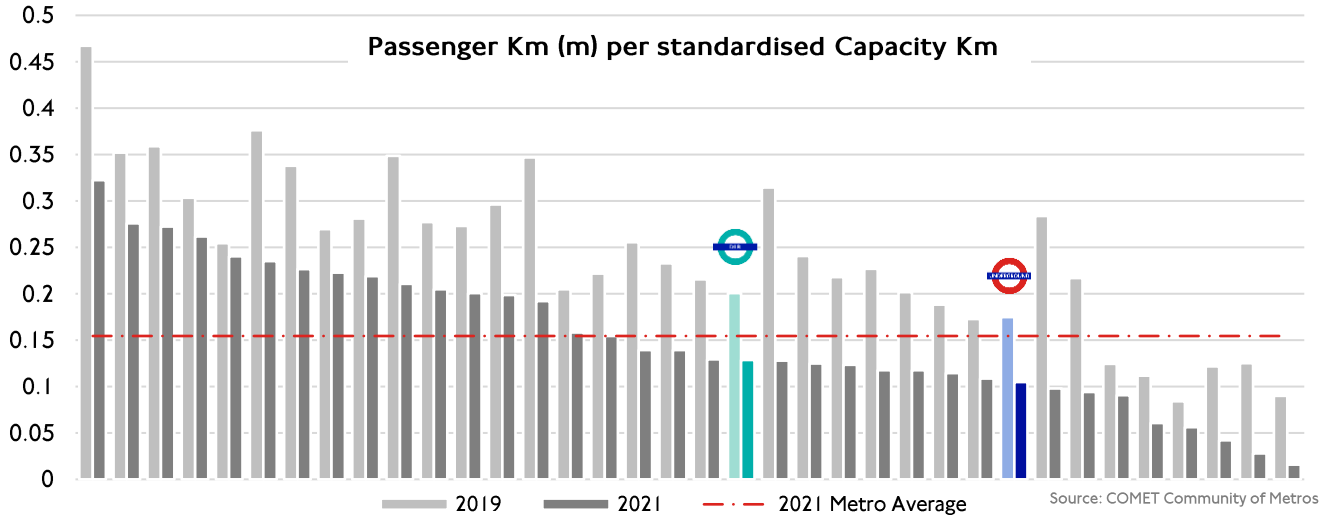
Supporting the TfL Business Plan

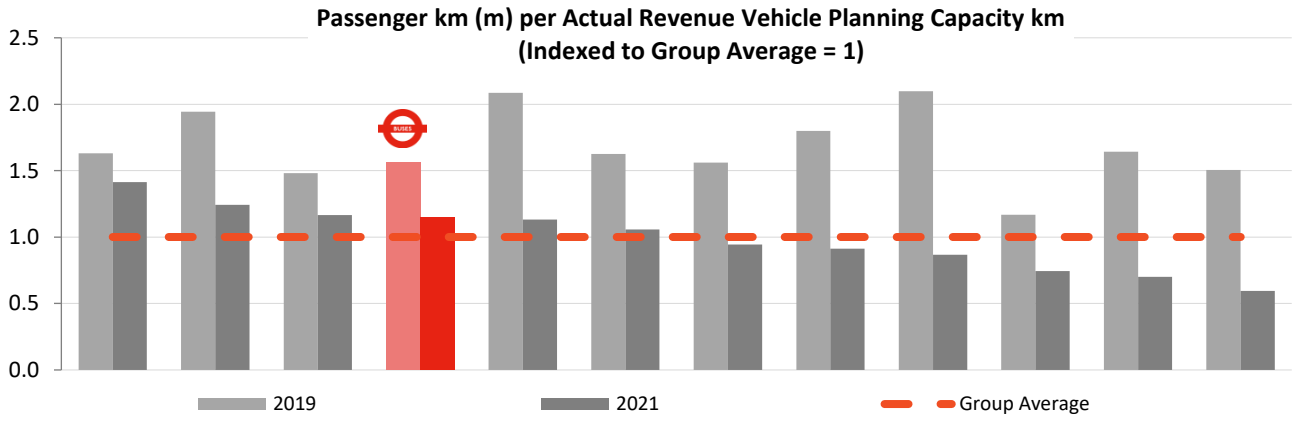
London has a higher reliance on fares income and less operating support from government. The potential to increase fares in the future may therefore be seen as fairly limited and/or result in close stakeholder scrutiny. Higher fares may also hinder TfL's aim to maintain and grow passenger journeys over our Business Plan. As such, TfL is considering the potential impact of different fare systems and ticketing types in a post-pandemic London. As per previous Mayoral commitments on fares, including the 2017-20 TfL fares freeze and Bus Hopper fare, we must also continue to find ways to support the lowest paid members of society and remove any financial barriers to using TfL modes. This may be in the form of new concessions, such as the recently announced provision of free travel across the network to some of the lowest paid transport workers (non-TfL employees).



A good public transport experience

Capacity provision and congestion





Source: IBBG Bus Benchmarking Group

How are we currently performing?

High service frequency is important to customers, especially at peak times when congestion can be an issue. Our highest peak hour rail frequency is provided by the Victoria line, operating 36 trains per hour in the peak. This compares favourably with global best-in-class. Key to achieving this has been modernisation and the introduction of highly automated signalling systems and trains.

Comparing total capacity provided against the number of passengers carried provides a gauge of supply versus demand, as well as congestion. Whilst it is beneficial to use as much of the capacity provided as possible, this must be balanced with services not becoming so overcrowded that they discourage customer travel or become a cause of service delays. Capacity utilisation has fallen globally following the pandemic. Underground and DLR performance is relatively moderate in comparison to their peers, while bus capacity utilisation remains just above the group average and lower than pre-pandemic.

While in general it may be true to say that London has public transport capacity to utilise, in practice the data obscures potential differences across specific times and locations within a city.

Supporting the TfL Business Plan

Investment in additional rail capacity has been deprioritised to align with our latest demand forecasts, which show that we will have public transport capacity in the medium term. The exception is for programmes that are financially committed, fully funded by third-parties, or deliver some capacity benefits as a secondary objective, for example where additional public transport capacity is required to unlock new housing. Bus capacity will continue to be reviewed, with a specific focus on supporting outer London.

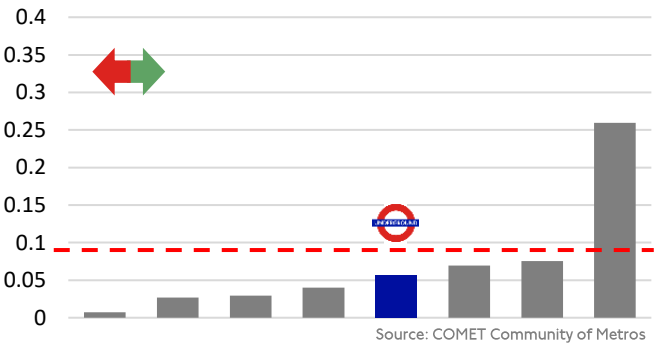
Rail reliability

Reliability is key to attracting customers to the network and providing a good service. However, reliability has many influencing factors when benchmarking globally. As a result it is important to consider the operating context of each metro before comparing their reliability.

When looking globally, Asian metros typically perform the strongest. This is down to many factors but they are predominantly much newer systems with fewer asset legacy challenges, in addition to very different operating environments and staffing models.

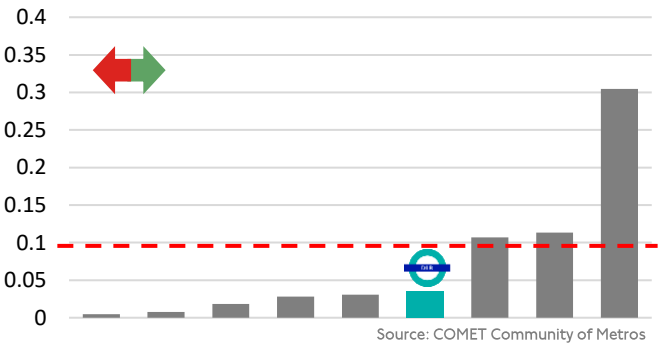
As a result, for the purposes of this report we have benchmarked our rail modes against what we consider the most similar comparator members to us. For Underground this group consists of the older, western Europe and north American metros. And for DLR, the newer western Europe and north American metros.

Million car kilometres between incidents causing a delay > 5 minutes to service (2021 data)



Source: COMET Community of Metros

Million car kilometres between incidents causing a delay > 5 minutes to service (2021 data)



Source: COMET Community of Metros

How are we performing?

The Underground is the oldest metro of the group, and has a set of very unique infrastructure challenges. Reliability, which has improved over the past decade, is above the median of the group, but below the average which has been skewed by one high performing member. Good performance is a result of improving and maintaining the condition of key assets, the introduction of modern signalling systems and fleets, and dedicated and determined management action focussed on identifying and addressing issues. It should also be noted that the Underground has high levels of utilisation of its train fleet during the peak. This means that it has fewer spare trains available if train failures do occur but allows high frequency services for customers. Metros in general have also suffered from staff absenteeism challenges leading to delays. This is a significant opportunity in the short to medium term.

DLR also represents one of the oldest systems in its group and was pioneering in train automation at the time of its introduction. As a result some of the newer metros with more current technology have achieved high reliability, although DLR's performance is still above the median of the group.

Supporting the TfL Business Plan

The continued investment in our assets remains a priority for rail reliability. Train and signalling failures account for a significant impact on performance, with old and life-expired assets a key reason for delays. The TfL Business Plan looks to provide sufficient funding for asset renewals, including key infrastructure such as track and the planned introduction of new train fleets on the DLR and Underground (initially on the Piccadilly line).

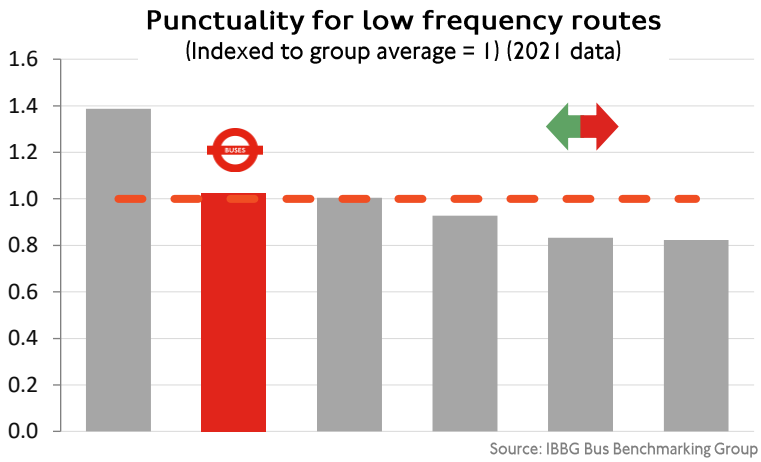
Bus reliability and information

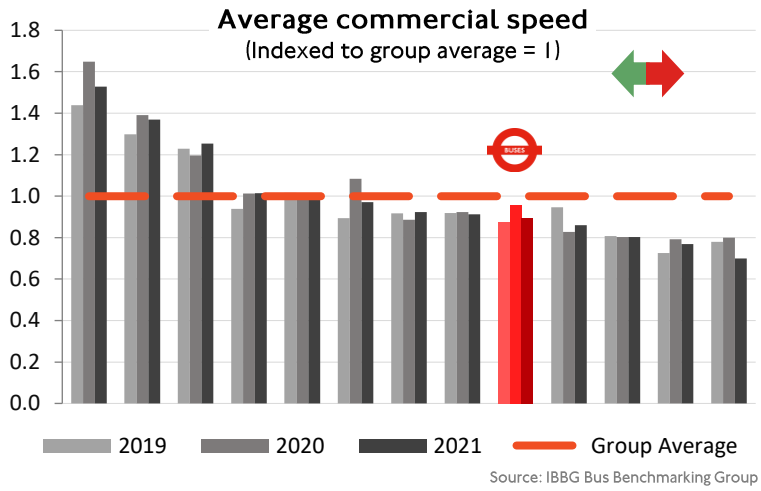
Bus Punctuality & Speeds

This measure is strongly influenced by road traffic conditions. The prevalence of bus priority lanes and technologies in comparator cities has a major impact on performance.

In London, our latest data shows that overall reliability has been on an improving trend over the past decade as traffic improvements and bus priority lanes have been added. The year 2020 showed an even bigger improvement, this was due to lower traffic levels on the road as a whole because of the pandemic. As a result performance dropped in 2021, but this still represents an improvement over 2019.

In comparison to global peers, our buses travel at lower average commercial speeds. Due to the same reasons as 2020 recorded good performance, while 2021, despite dropping, shows good improvement over 2019 which has more comparable traffic levels.





What are we doing to improve?

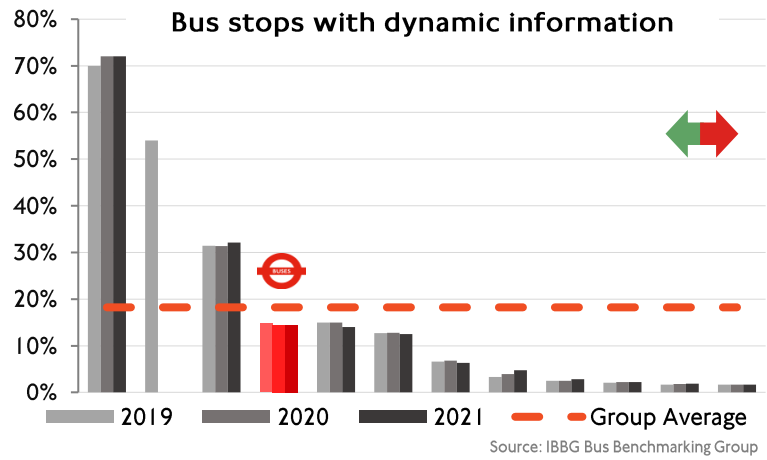
We are investing in bus priority schemes, route and traffic management, and traffic signal timing reviews, to make journeys quicker and more reliable.

Bus customer information

Despite 14 per cent of bus stops providing dynamic information TfL is below the average coverage. However, TfL still remains within the top 5 of comparators.

All of our buses are equipped with iBus and automatic vehicle location which enables customers to obtain real time information through mobile technology throughout the network. We are also trialling new technology to improve the information available to customers such as digital displays at bus stops.

We have also introduced the TfL Go app helping our customers get the latest real time travel information.



Making transport more accessible

How are we performing?

The Underground network has a lower percentage of step-free stations than most international comparators.

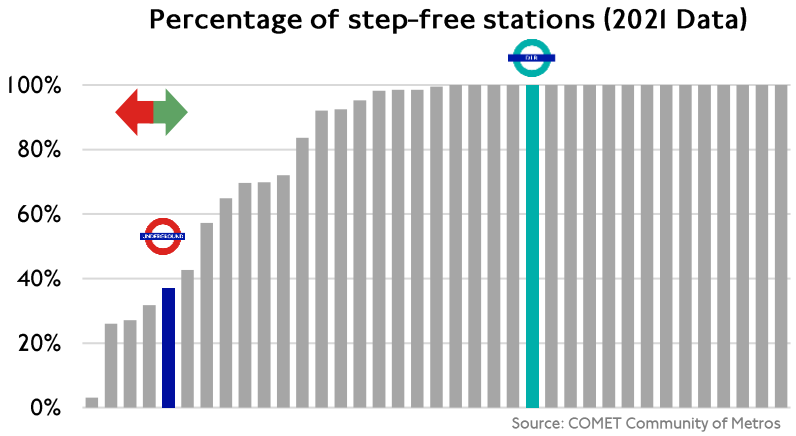
This is predominantly a legacy issue driven by the age of our network - the Underground being the oldest metro in the world at 160 years old - and infrastructure in comparison to newer metros, especially those in Asia, which tend to have been designed and built with step-free access (SFA).

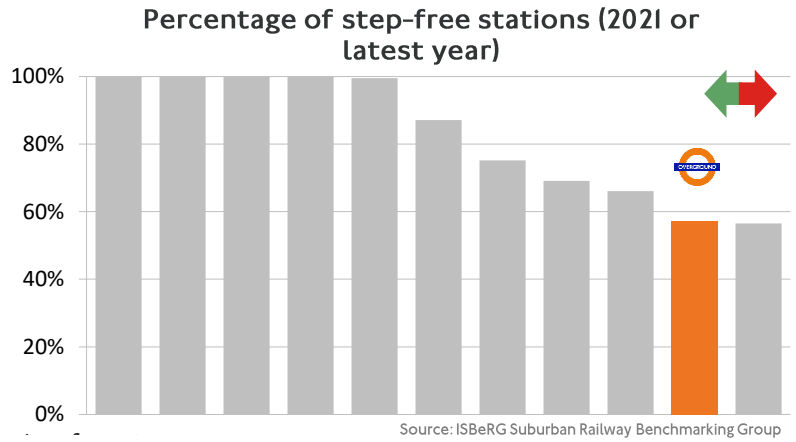
The DLR and Trams are both fully step-free, as is the Elizabeth line.

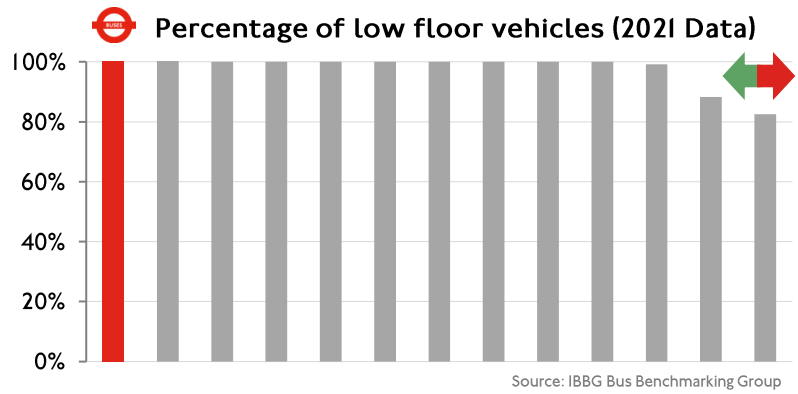
Like the Underground, our Overground network is below average amongst its peer group. This is down to similar infrastructure challenges, with old stations that we never designed with accessibility in mind. A large proportion of the stations served by the Overground are also not owned by TfL, limiting TfL opportunities to make improvements.

Where we build new stations and/or extensions we include step-free access, such as the Barking Riverside and Northern line Extensions.

Of thirteen comparator bus operators we are one of eleven world leaders for whom their entire fleet is comprised of low-floor vehicles.







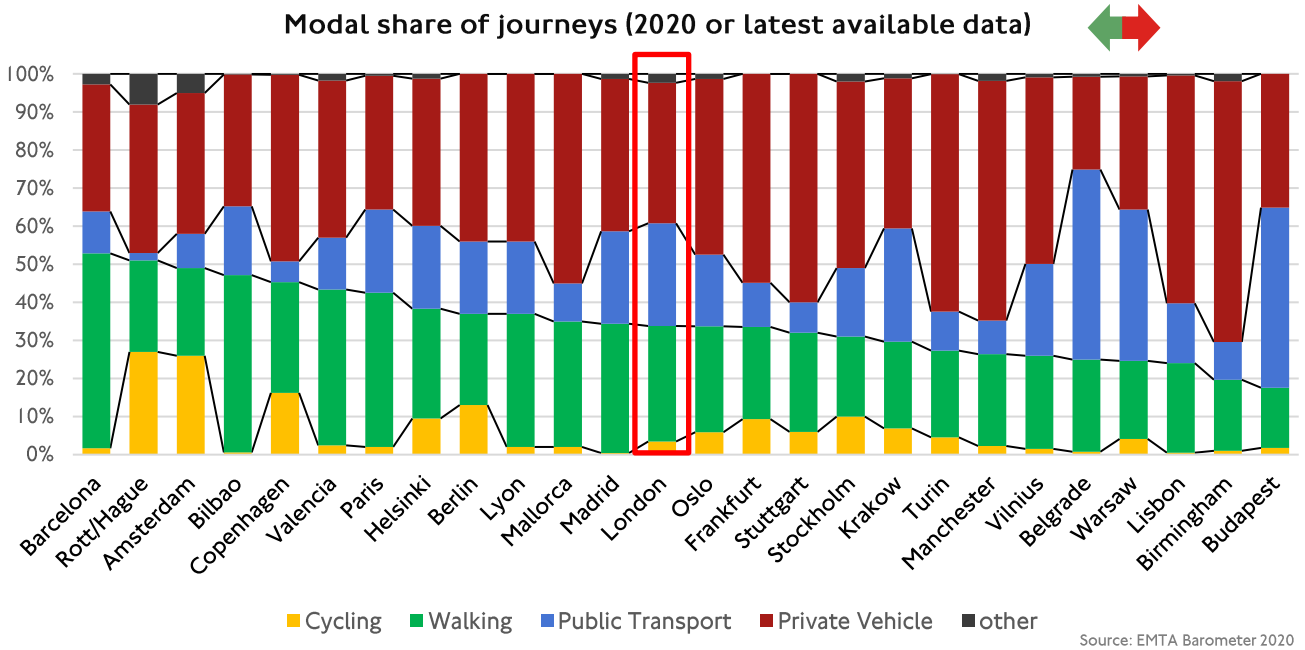
Supporting the TfL Business Plan

Future plans for accessibility are being developed, with a pipeline of potential projects being considered following the recent TfL public consultation. In the short-term, with overall funding limited, we will need to seek opportunities for third-party funding to deliver further accessibility benefits. Examples include the recent successful bids to the Government through the 'Levelling Up' funding to make Colindale and Leyton stations step-free. Other key focuses will be improving our information provision for step-free users such as the introduction of the TfL Go app and step-free planning tool. TfL also provides the Dial-a-Ride service, a free non-rail service aimed at improving transport across the capital for disabled travellers.

Healthy Streets & healthy people

Walking and cycling

We will ensure that sustainable modes have the capacity to cater for a constantly growing population and the ability to attract that demand through high levels of service.



Source: EMTA Barometer 2020

How are we performing?

One third of journeys across the network are completed either via walking or cycling according to the 2020 European Metropolitan Transport Authorities (EMTA) barometer data. If you include public transport that increases to two thirds. This places us at approximately the average for the level of active travel modes, and slightly above average if you include public transport.

We are committed to encouraging a modal shift towards more sustainable travel as set out in the Mayor's Transport Strategy. To accomplish this we will reduce traffic and make walking, cycling and public transport safer and more attractive.

Supporting the TfL Business Plan

We have combined all our streets funding into a Healthy Streets portfolio, prioritising walking, cycling and public transport. Now, following our latest funding agreement, we have been able to resume spending on our Healthy Streets programme. Within this Business Plan, we will continue to invest £150m per year in our Healthy Streets programme, working with boroughs to enable more people to walk, cycle and use the bus, as part of our aim for 80 per cent of trips in London to be by sustainable modes by 2041. The programme includes:

- Major street improvements for safer walking and cycling
- Development of new pedestrian priority signals
- Over the next two years, as well as completing existing schemes, we will begin construction on up to 14 km of additional cycleways and progress with design work for a further 16 km of cycleways

Creating efficient streets will require measures to manage demand. We have now started to explore how a new kind of integrated road user charging scheme could be implemented in the future to improve safety, air quality, address climate change and reduce congestion. This could also support health and wellbeing for Londoners by creating a greener, more sustainable city for active travel.

Safer London

Road safety

TfL is working with the Organisation for Economic Co-operation and Development (OECD) International Transport Forum (ITF), as part of the Safer City Streets initiative on benchmarking road danger reduction.
https://www.itf-oecd.org/safer-city-streets

How are we performing?

Analysis by the OECD shows that London's average road fatalities per 1,000km of road network is 7.8 and 10.5 in Greater London and inner London respectively.

This puts Greater London within the top ten performing areas of the benchmark.

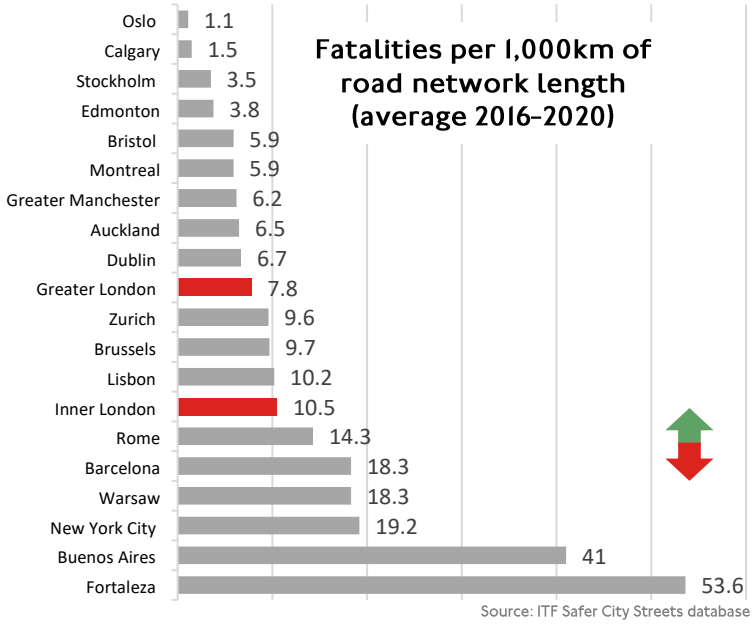
When looking at cycling fatality risk, London currently sits slightly better than average, and when assessing pedestrian fatality risk inner London is currently the best performing (however it is a relatively small sample size).

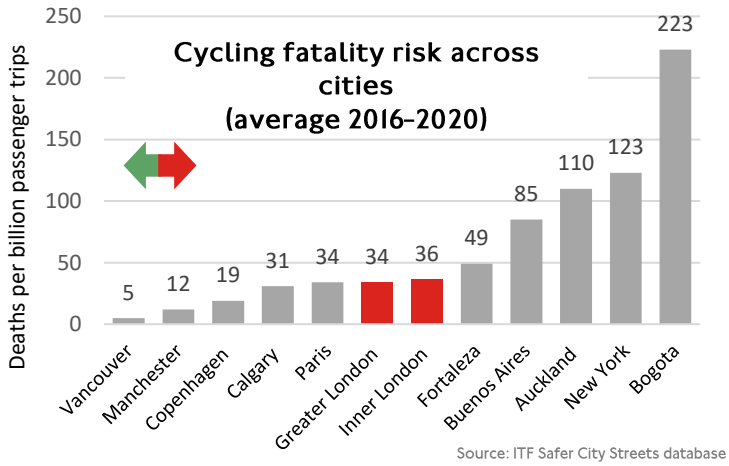
Supporting the TfL Business Plan

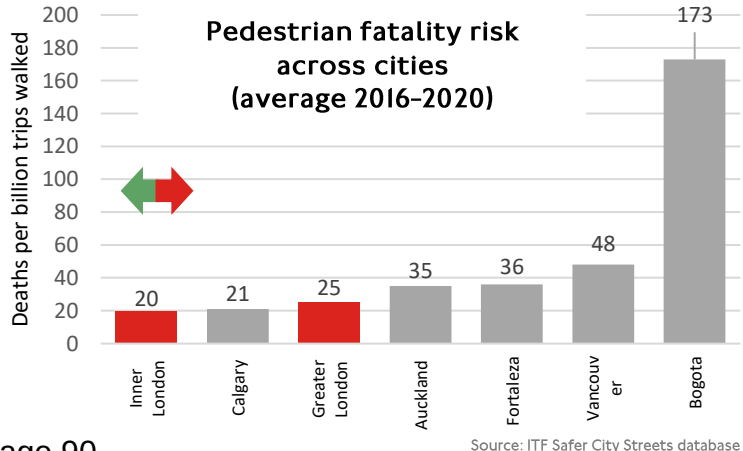
We have adopted a 'Vision Zero' approach to road safety, with the reduction of all road dangers a core principle of the Healthy Streets portfolio, as set this out in the 'Vision Zero action plan', released in 2018.

As part of our Safe Systems approach, we will continue to invest in safe and healthy streets. We will continue work to progress the next stage of our HGV Direct Vision Standard (DVS), continuing to make our buses safer through our Bus Safety programme, while also lowering the speed of vehicles in London. Lowering speed is key to reducing both the likelihood of a collision and the severity of the outcome. By working with London's boroughs, nearly half of London's roads now have a 20 miles per hour speed limit, as do more than 100 kilometres of our roads. We will continue to lower speed limits across London to reduce road danger.

This is in addition to our Safer Junctions programme which target's locations where the greatest numbers of people have been killed or injured while walking, cycling or riding motorcycles, we have already redesigned 43 junctions as part of it, and will continue to invest in further locations going forwards.







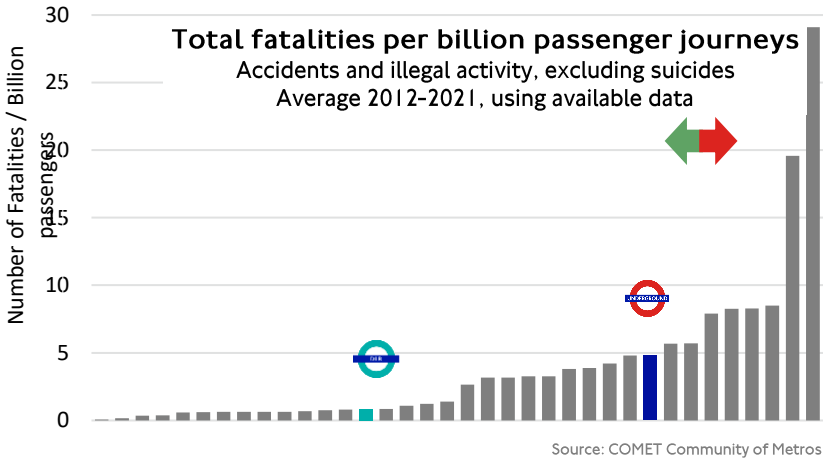
Safer London

Major cities around the world are taking a stand to end the toll of deaths and injury seen on their roads and transport networks by committing to Vision Zero. London is fully committed to this approach and the Mayor's Transport Strategy sets out the goal that, by 2041, all deaths and serious injuries will be eliminated from London's transport network.

Rail safety

We have benchmarked railway safety on fatalities due to illegal activity and accidents, but excluding suicides against the number of journeys.

Newer metros tend to have a higher proportion of stations with Platform Edge Doors (PEDs), which restricts access to the track and reduces platform-train interface incidents. Newer stations are also often better designed with safety in mind as a result.



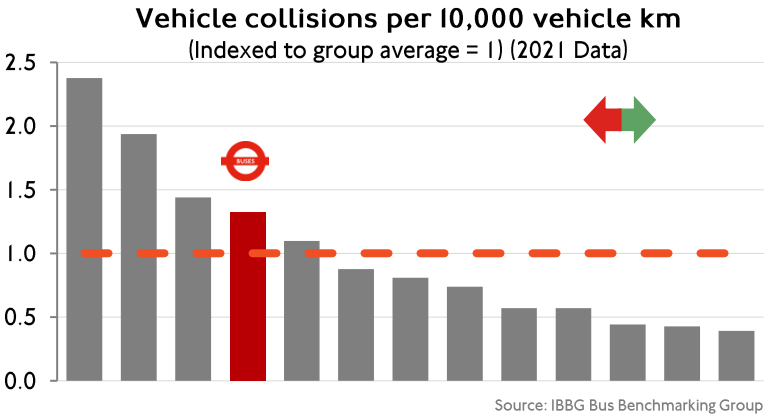
Source: COMET Community of Metros

We are continuing to carry out initiatives across our modes to prevent suicides. This includes providing training to staff and undertaking customer awareness campaigns to promote safe behaviours on our networks.

As part of our pandemic response we introduced enhanced cleaning and have installed UV escalator handrail cleaners to encourage passengers to hold on to handrails. We are also committed to our colleagues safety working closely with the British Transport Police (BTP) and our enforcement officers as well as rolling out body worn cameras to minimise crime on the network and improve the safety of our frontline teams and customers.

Bus safety

Positive progress had been made reducing collision rates since 2017, and furthermore when road use changed during the pandemic. Buses are the safest form of road transport in London. However, more recently bus collisions are above average and we're currently fourth highest of the IBBG members.



Source: IBBG Bus Benchmarking Group

We have set ourselves the target of zero fatalities on the bus network by 2030 and zero serious injuries by 2041, with reducing bus collisions a key priority. We will continue to further enhance and deliver our Bus Safety Programme to reduce collisions, with measures including the continued roll out and development of our Bus Safety Standard, which is evidence-led and is focussed on vehicle design and safety system performance; embedding innovative safety training for bus drivers and their instructors; and reducing fatigue and distraction while improving bus drivers health and wellbeing.

We have rolled out the Bus Safety Standard on new buses with approximately 10 per cent of the bus fleet (890 vehicles in February 2023) now featuring safety measures including Intelligent Speed Assistance, Acoustic Vehicle Alerting Systems, Camera Monitoring Systems, features to reduce pedal application error, technology to prevent runaway buses, and improved occupant friendly interiors including enhanced slip-resistant flooring, with work ongoing in preparation to introduce Advanced Emergency Braking and improved bus front end design to new vehicles from 2024.

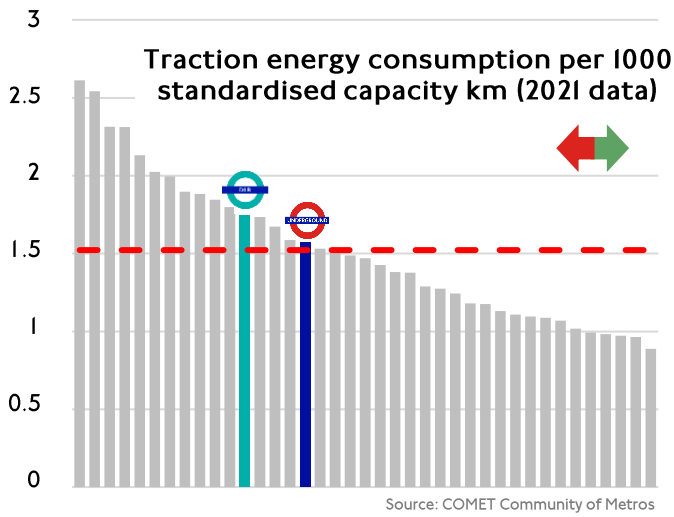
Carbon reduction and energy efficiency

The TfL Business Plan outlines our ambition to deliver net-zero TfL operations by 2030, and to seek out opportunities to reduce energy consumption. Environmental benchmarking data across the TSC benchmarking groups, and public transport organisations more generally, is currently less detailed than for other strategic priorities, e.g. reliability and safety. This topic is however receiving more focus, with clear ambitions to improve benchmarking in this area.

Metro energy consumption

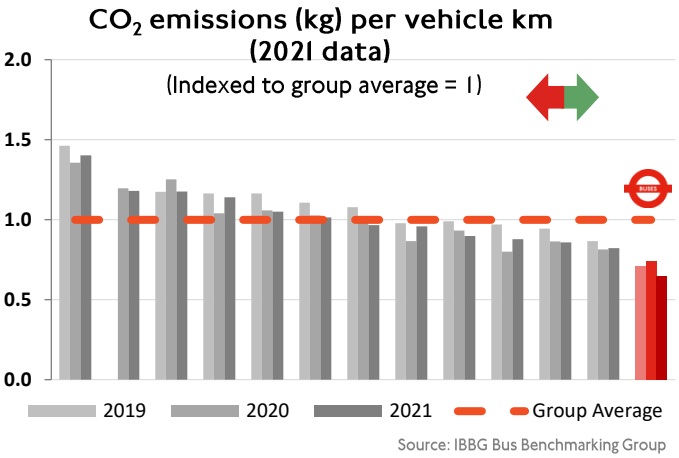
An emerging COMET case study on energy efficiency indicates that the short-term priority for metros is primarily on energy consumption rather than carbon levels. As a major user of electricity, metros operating costs are significantly impacted by energy supply issues and increasing energy prices.

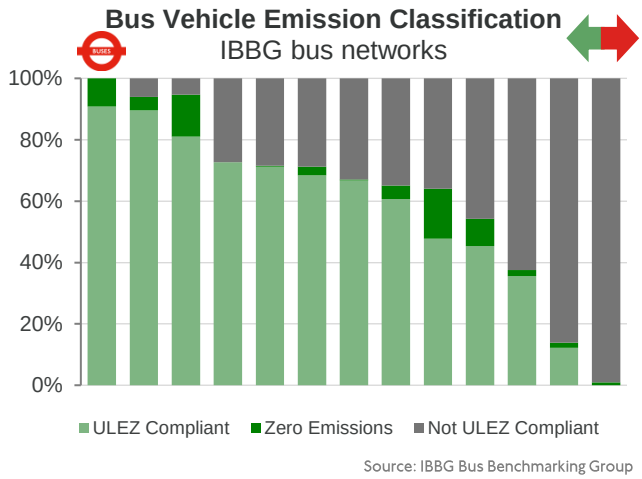
Both the Underground and DLR have relatively high energy consumption levels as a proportion to service capacity compared to COMET peers. Potential improvements can be linked to the introduction of modern infrastructure, signalling and trains, all of which are more energy-efficient than legacy asset types.



Bus carbon and vehicle emissions

London buses are amongst the best-in-class in terms of vehicle emissions and continue to improve year-on-year. TfL continue to target the removal of all petrol and diesel buses by at least 2034, and those that do currently use fossil fuels meet Euro VI regulations in line with ULEZ requirements:





Supporting the TfL Business Plan

Public transport modes generally provide a more environmentally sustainable way to travel. This highlights the need to encourage mode share and the increased use of active travel modes such as walking and cycling. Where public transport is used, TfL wants to provide carbon free services wherever possible. Our Corporate Environment Plan sets out our key priorities, including our target to have a full fleet of zero-emission buses by 2034 and the decarbonisation of our buildings.

Summary

Summary

Whilst it is not always straightforward to make direct benchmarking comparisons across public transport operations, we can use data to provide an indication of how our performance, and progress towards improvement, compares to others, prompting questions as to how we can improve further.

This report show areas where we perform well, and in some cases are best-in-class. The report also shows where there is the potential to seek out improvement opportunities.

Pandemic recovery

- Demand continues to be impacted by the after effects of the pandemic and remains lower than it was prior to 2019. However in recent months London has shown strong resilience and is recovering in line with most of its peers. Transport remains at the forefront of the capital's recovery and by continuing to provide for the needs of its people we can ensure that demand returns and grows.
- The pandemic had a huge impact on our finances, however London has led the way in providing an example of how to achieve financial sustainability in the past and continues to perform well despite the current challenges.

A good public transport experience

- Capacity across the network is currently high, this partly due to dampened demand from the pandemic but also because of the improvements made to provision in recent years. We are performing above the average across modes except for the Overground where the varied membership infrastructure influences the average.
- Reliability is impacted by the structural factors that influence performance of a wide variety of metro members within the COMET group particularly. When comparing our rail modes we are currently performing similarly to our peers. However, there are members that have achieved very high reliability with similar constraints to us which can learn from, especially in terms of delays relating to staff availability.
- In term of accessibility, we continue to perform well in our newer modes and infrastructure as well as on our buses. Structural factors and levels of investment continue to affect London Underground but progress has been made in recent years to improve step-free journeys across the network.

Healthy Streets and healthy people

- Safety remains our top priority at TfL. Performance remains good when compared to peers however there is still more work to be done to be industry leading and achieve Vision Zero.
- Active Travel has seen large increases over the last decade, however progress has slowed over recent years. We remain committed to making active travel a viable and attractive option. When considering use of sustainable modes as a whole (including public transport) we continue to see a good modal share.
- London is at the forefront of a global drive to make cities more sustainable and environmentally friendly, and we currently perform well against our peers – continued delivery of our Corporate Environment Plan and initiatives will ensure that we continue to set the pace for reducing carbon emissions. This is an increasing area of interest amongst international peers and an area of benchmarking that will be developed further.

Benchmarking priorities for 2023/24

As international benchmarking is a collaborative process, TfL has to work with its partners to collectively agree priorities for the period ahead. Typically, members propose new areas of benchmarking at certain points during the year, with the final agreement on topics agreed via a majority voting system (with all members having one vote).

This report has highlighted a number of opportunities where benchmarking may be able to support the TfL Business Plan, and these topics – summarised below – present an initial list of benchmarking goals for 2023:

- A continued focus on customer demand trends and how public transport networks adapt in a post pandemic world, both in terms of service provision and encouraging passenger journeys

- Wherever possible, ensure that future benchmarking considers value for money of public transport operations to highlight potential efficiency/savings opportunities

- Embed the Elizabeth line into the ISBeRG benchmarking group and consider both; the case for joining the new Imperial College benchmarking group for trams and developing benchmarking in less mature areas such as Walking and Cycling

- Continue to increase the focus on new benchmarking priority areas such as environmental sustainability and climate change adaptation. Understanding the role transport operators can play in reducing our impact on the environment

- Considering structural factors, continue to explore how we can increase reliability and provide the good service our customers have come to expect

- Continue to prioritise safety across all of our operations, progressing towards Vision Zero and working collaboratively across transport operators to achieve ambitious targets

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Customer Service and Operational Performance Panel

Date: **22 March 2023**

Item: **Bus Action Plan Update**

This paper will be considered in public

1 Summary

1.1 This paper provides an update to the Panel on the Bus Action Plan.

2 Recommendation

2.1 The Panel is asked to note the paper.

List of appendices to this report:

Appendix 1: Bus Action Plan Update

List of Background Papers:

None

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Customer Service and Operational Performance Panel

22 March 2023

Bus Action Plan Update

Our Bus Action Plan (BAP) sets out:

- the case for change;
- our vision for 2030;
- our actions across five thematic areas; and
- our approach to uncertainty around demand and funding

Case for change

- Tackling the climate emergency
- Meeting Londoners' diverse travel needs
- Avoiding growth in car usage and supporting Road User Charging (ULEZ)
- Complementing walking and cycling in creating Healthy Streets
- Enabling London's sustainable growth and development

Our vision

- We need bus travel to be a zero-carbon option more Londoners choose to use, as part of a comprehensive active, efficient and sustainable transport network

Our actions

Inclusive Customer Experience

Providing the information our customers need

Improving the customer journey experience

Enhancing the inclusivity of our services

Safety & Security

Delivering Vision Zero on our network

Ensuring people feel safe and secure

Improving bus driver welfare

Journey Times

Delivering better streets for buses

Making better use of street space

Optimising our operations

Connections

Planning our bus network to achieve mode shift

Trialling new types of services

Unlocking new homes and jobs

Decarbonisation & Climate Change Resilience

Delivering a zero-emission bus network

Investing in opportunity charging and hydrogen fuel cell buses

Delivering climate change adaptation and green infrastructure

External Engagement

Borough Meetings:

- Director / cabinet lead / elected member level
- Feedback has been very good so far from nine Boroughs met
- Remaining 24 Boroughs to be seen over next nine months

Borough Bus Event – BAP 1 year on:

- Councillors and Officers in attendance
- Chance for face to face discussion on BAP

Internal Engagement

- BAP presentations to teams across business
- Regular Insight Sessions

Challenges and Opportunities to delivering the Bus Action Plan

Area	Challenge and Opportunity
Stakeholder Engagement	The level of change in the May 2022 elections delayed meeting newly elected members to engage. However the meetings we have now held have been very positive – with constructive feedback on how both boroughs and TfL can and should change to work better together, alongside welcome of a clear strategy.
Funding	The funding uncertainty in the first half of last year delayed most BAP activity. This has been particularly prominent in areas such as safety development and bus priority which have longer lead times to implement. We have clearer funding into next year and beyond.
Central London Changes	The consultation last summer created a negative perception of the future of the bus network. Now that we have a clear position on future bus service levels in Central London, and a new offer in Outer London, we can re-double our engagement with stakeholders to explore the opportunities to improve our service to customers and others through the action plan

What we achieved in 2022/23

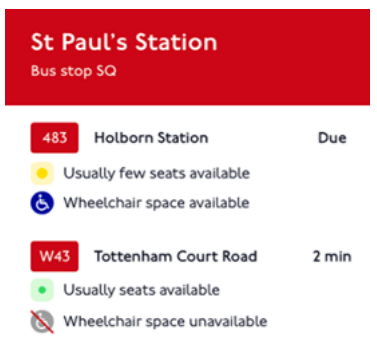
- Route 63 ‘whole route’ trial
- Bus Stop Information Trials
- ‘Welcome Aboard’ and new info posters
- 321 new countdown signs procured
- c.3km of new bus lanes
- 15,000 bus passenger hours saved due to 1200 signal timing reviews
- 280 NRM refurbishments
- 950 ZE buses (Spring 2023)
- Bus Station Design Guidelines Published (Spring 2023)
- Bus Priority Best Practice Guidelines Published (Spring 2023)
- BSS Rollout ongoing
- 142 Project Guardian Sessions (2022)
- 11 new driver facilities built

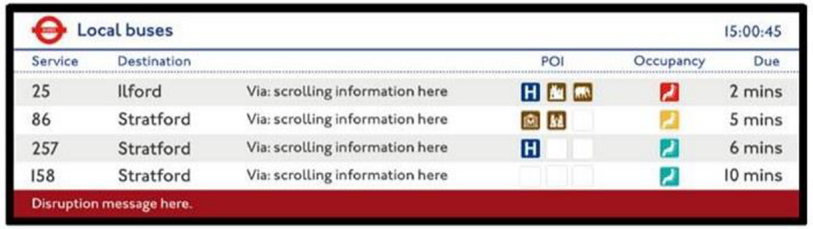
Route 63 – Trial feedback so far

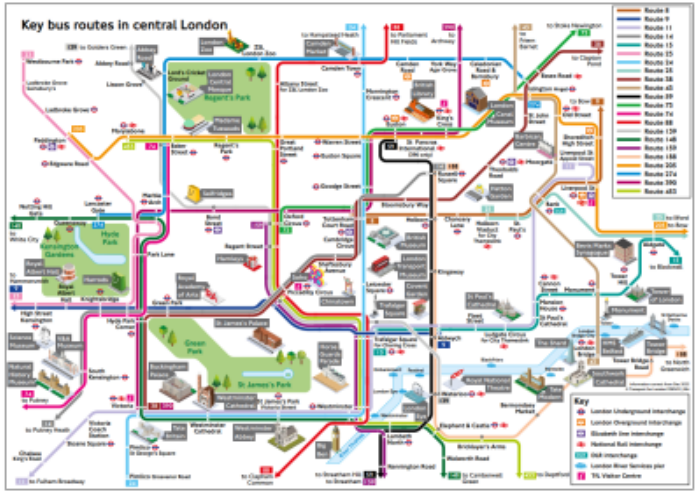
- Increase in customer satisfaction post introduction of trial (up to 81%)
- Particularly around personal safety at bus stops due to lighting and also condition/cleanliness of stop/shelters
- Rating of comfortable seating, temperature control and space on board also increased
- On board digital information and USB chargers also popular
- Willingness to Pay research on Route 63 is complete and report due end of March

Customer improvements coming 2023/24:

- Enhanced printed Customer information
- Directional signage for buses at all Elizabeth line stations
- Central London service changes customer info to assist with interchanges/ alternative travel
- 321 additional countdown signs installed
- Bus Busyness and Automated Passenger Counting trials
- 40 new and improved Bus shelters across Bromley and Sutton
- Sutton ‘whole area’ trial 100 new electric buses, schedule improvements, improved customer features and traffic light rephasing







Coming up in all areas 2023/24

- Opportunity Charging Pilot (Spring 2023)
- Driver EDI Training Rollout (Early 2023)
- New Bus Shelter Design Contract Award (Winter 2024)
- Kingston Cromwell Rd Bus Station Renewal (Winter 2023)
- 96% Bus Stop accessibility compliance (Spring 2024)
- 2024 Bus Safety Standard introduced
- 10/25km of new bus lane
- New Service Planning Guidelines (Spring 2023)
- Countdown 3 Contract Award (Autumn 2023)
- iBus 2 Contract Award (Winter 2023)
- 1000 ZE Buses (Summer 2023)

Questions?

Customer Service and Operational Performance Panel

Date: **22 March 2023**

Item: **Members' Suggestions for Future Discussion Items**

This paper will be considered in public

1 Summary

1.1 This paper presents the current forward plan for the Panel and explains how this is put together. Members are invited to suggest additional future discussion items.

2 Recommendation

2.1 **The Panel is asked to note the forward plan and invited to raise any suggestions for future discussion items.**

3 Forward Plan Development

3.1 The Board and its Committees and Panels have forward plans. The content of the plans arise from a number of sources:

(a) Standing items for each meeting: Minutes; Matters Arising and Actions List; and any regular quarterly reports. For this Panel this is the Quarterly Customer Service and Operational Performance Report.

(b) Regular items (annual, half-year or quarterly) which are for review and approval or noting.

(c) Matters reserved for annual approval or review: Examples include benchmarking report.

(d) Items requested by Members: The Deputy Chair of TfL and the Chair of this Panel will regularly review the forward plan and may suggest items. Other items will arise out of actions from previous meetings (including meetings of the Board or other Committees and Panels) and any issues suggested under this agenda item.

4 Current Plan

4.1 The current plan is attached as Appendix 1. Like all plans, it is a snapshot in time and items may be added, removed or deferred to a later date.

List of appendices to this report:

Appendix 1: Customer Service and Operational Performance Panel Forward Plan 2023/24

List of Background Papers:

None

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Customer Service and Operational Performance Panel Forward Planner 2023/24

Membership: Dr Mee Ling Ng OBE (Chair), Marie Pye (Vice Chair), Bronwen Handyside, Anne McMeel, Dr Lynn Sloman MBE Peter Strachan and Cllr Kieron Williams.

Abbreviations: CCSO (Chief Customer and Strategy Officer), COO (Chief Operating Officer), Chief Finance Officer (CFO), Chief Capital Officer (CCO)

D (Director) - IDP (Investment Delivery Planning), PTSP (Public Transport Service Planning), SHE (Safety, Health & Environment); SI (Strategy & Innovation); SPE (Security, Policing and Enforcement), CP (City Planning), B, (Bus), C (Customer)

Standing Items	
Quarterly Customer Services and Operational Performance Report	CCSO & COO
Customer Safety and Security Update (different focus each meeting)	CCSO & COO

12 July 2023		
Cycling Action Plan Update	CCSO	Annual
Deep Dive of Customer Care Score	CCSO (D-C)	Annual
Customer Safety and Security Update: Chronic Fare Evasion, Offender Management & Work-Related Violence	COO (D-SPE)	Update
Assisted Transport Services Update	COO	Every six months
Extreme Heat Measures Operational Readiness Plan Update	COO	Update (action from Board)

4 October 2023		
Customer Safety and Security Update	D-SPE	Every six months
Enterprise Risk Update: Deterioration of Operational Performance (ER6)	COO	Annual
Delivery of the Mayor's Transport Strategy: Step-free Access	COO (D-IDP)	Annual
Winning Back Our Customers	CCSO	Update
Bus Services to London Hospitals	CCSO (D-PTSP)	Annual
Customer Journey Modernisation	COO	Every six months

Customer Service and Operational Performance Panel Forward Planner 2023/24

5 December 2023		
Assisted Transport Services Update	COO	Every six months
Customer Safety and Security Update	D-SPE	Every six months

21 March 2024		
TfL International Benchmarking Report	CCSO & D-SI	Annual
Customer Safety and Security Update	D-SPE	Every six months
Customer Journey Modernisation	COO	Every six months

Regular items/Items to be scheduled

- Customer Safety and Security Update – quarterly
- Winning Back Our Customers – Update
- TfL International Benchmarking Report – annual (March)
- Bus Services to London's Hospitals – annual (October)
- Assisted Transport Services Update – every six months (July and December)
- Customer Journey Modernisation – every six months (October and March)
- Cycling Action Plan Update – annual (July)
- Delivering the Mayor's Transport Strategy: Step-free Access – annual (October)
- Enterprise Risk Update: Deterioration of Operational Performance (ER6) – annual
- Deep Dive of Customer Care Score – (annual) July