

This paper will be considered in public

1 Summary

- 1.1 The purpose of this paper is to present the Overview of Travel in London 14. The Travel in London Report is an annual report and this year's report will be published on the TfL website a few days after this meeting of the Board.

2 Recommendation

- 2.1 **The Board is asked to note the Travel in London 14 Overview Report.**

3 Background

- 3.1 Travel in London reports are produced annually. They provide an interpreted summary and evidence base of key trends and developments affecting travel in London, in the context of the aims of the Mayor's Transport Strategy.
- 3.2 This year, the report considers the broad impact of the coronavirus pandemic on the Mayor's transport aims. It also provides an interpreted summary of the emerging evidence about London's transport recovery, covering the period up to late autumn 2021. The data and insights provided by this report will be used across the business to help guide short- and longer-term planning in the post pandemic era.

Impact of the pandemic on the Mayor' transport aims

- 3.3 The pandemic severely disrupted daily life in London, and this has been reflected in travel demand trends on the networks. Overall travel demand in 2020, in terms of trips, was 75.2 per cent of normal. The composition of these trips (mode, distance, timing) also changed radically. The overall active, efficient and sustainable mode share for 2020, 58.3 per cent, might therefore be regarded as resilient in the circumstances. The data for 2021 is not yet fully available, however from the data sets that are available it appears likely that the sustainable mode share will be broadly the same as last year, albeit with a growth in the overall trip levels.
- 3.4 These changes to travel, albeit hopefully temporary, have revealed many insights (both positive and negative) that are relevant to contemporary policy concerns, and these are picked up in the report. For example, the extreme challenges of lockdown brought a move towards more local travel and this has seen increases in walking and cycling.

- 3.5 Capturing some of these more positive aspects while minimising the disbenefits is the clear challenge and opportunity for the next stage of the recovery.
- 3.6 Amid all this disruption, TfL has operated high levels of service to support essential journeys, and, latterly, to provide fully for London's recovery. There was continued good progress with Mayoral priorities such as air quality, step-free access and supporting new homes and jobs. In collaboration with the boroughs, we delivered an ambitious Streetspace for London programme, prioritising safety during the pandemic and encouraging active travel over the longer term. More recently we successfully opened the Northern Line Extension to Battersea Power Station, this is currently seeing strong ridership levels and has clearly supported the rapid growth in this new quarter of London.

Emerging evidence about the recovery

- 3.7 The report assembles and interprets the evidence about how potentially the pandemic might affect travel demand and travel behaviour over the long-term, considering factors like hybrid working and e-commerce, as well as the demographic and economic backdrop. We describe a Hybrid demand forecast, based on an assessment of this evidence, that is to be used alongside our established Reference case forecast, as a way to take account of continued uncertainty for longer-term project and policy planning.
- 3.8 Whilst car travel has been close to normal for some time, it has notably not exceeded post-pandemic levels. Bus and Tube demand are returning towards normal, although at notably different speeds, for example higher relative levels of demand at off peak times and a slower return in weekday AM peak commuter travel which is replicated on National Rail feeder services. Demand for cycling remains very strong, as it has done throughout the pandemic, with, for example, Santander Cycles, focused on central London, continuing to see well above pre-pandemic levels of demand into late autumn.
- 3.9 The pattern is however developing very rapidly, and more recent weeks have seen encouraging growth on public transport. With the approach of Christmas and, perhaps, the wider return of workers and potentially more international tourism next year, it remains crucial that we continue to operate a comprehensive service that is seen by our customers to be safe, reliable and sustainable, in order to play our full part in the recovery and capitalise upon the opportunities for advancing the Mayor's transport aims.

List of appendices to this report:

Travel in London 14 Overview

List of Background Papers:

None

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