



DERAILED: GETTING LONDON'S TRANSPORT BACK ON TRACK

Contents

Executive Summary	2
Introduction	3
The Story of Lockdown	4
Londoners' Perspectives	7
Consequences	10
The New Normal	12
TfL Changes	15
How should TfL proceed?	18
The Impact on London Life	22
Quality of Life	23
Recommendations	24
Conclusion	26
Appendix 1: YouGov Poll Questions	23
Appendix 2: YouGov Poll Results	29

Executive Summary

London in September 2020 looks very different from London in September 2019 or even February 2020. By looking back at the events of the last six months and forward at what lockdown-inspired changes might mean for the future of London transport and for Transport for London, this report suggests where we should go from here.

It seems clear that in London the period of lockdown has had a profound impact on the world of work. With many unable to work in their office and public transport capacity greatly reduced, employers and employees have had to find alternative ways of working and or getting to and from work. For a great number of people that has meant working from home. Whilst this has not and will not suit everyone, many businesses and employees have found it a positive experience and intend to continue home working – either full-time or part-time – for the foreseeable future.

Polling that YouGov conducted for the GLA Conservatives between 29th June and 2nd July showed some of the key changes we can expect once lockdown is over. Londoners will walk a lot more – 51% had walked more during lockdown and 56% expect that to be a permanent change. We can also expect a small increase in cycling – although it's noteworthy that 21% gave up cycling completely, in comparison to 13% who cycled more – and a big drop in public transport use, with around a quarter of those who used public transport less and a similar percentage of those who stopped using it completely expecting that change to be permanent.

Instead of trying to somehow return London to the way it was before lockdown – an effort that would inevitably prove impossible – the Mayor and TfL should focus on the core mission of keeping London moving. This means making it as easy, as quick and as safe as possible for Londoners and those visiting London to travel wherever they need to go.

The Mayor will need to accept that the increase in working from home has permanently reduced public transport usage, but that he needs to maximise public transport capacity to help give people who need to use the bus or the Tube the confidence to do so. Accepting that home working will be the choice for many means finding ways to offer transport options that facilitate people's choices, rather than seeking to stop them.

The Mayor will need to cut the cost of Transport for London and find ways of raising more money, but his focus should be on maximising revenue from TfL's capital assets, not by finding evermore ways of stinging motorists. For example the Mayor's decision to increase the cost and expand the scope of the Congestion Charge was absolutely the wrong one and it has demonstrably had a damaging impact on Central London. TfL should exist to serve London and Londoners, whereas too often it appears to think it should be the other way around.

A vital but undervalued role for TfL is as a facilitator. There are a great many ways in which TfL could help ensure that those travelling in London have useful options without actually providing those options itself. These can range from ensuring that black cabs can travel anywhere that buses go, to enabling e-bikes and e-scooters to travel on London's roads to recognising the value of motorcycles in using road space efficiently.

TfL is facing an existential crisis. Steady as she goes will not work. There is an undoubted need for the Mayor and TfL to be bold, to recognise and correct past mistakes and to swiftly adapt to the new normal. There is a chance to reshape London transport to make it fit for purpose. Let us hope that the Mayor does so.

Introduction

On 10th January 1863 the Metropolitan Line opened, marking the start of the world's first underground passenger railway. Since then the London Underground has consistently evolved and expanded to the point where London has one of the largest and most complex integrated transport systems in the world. By December 2019 this system, which is now under the spotlight like never before as a result of the Coronavirus pandemic, saw around 117.5 million Tube journeys and 176.8 million bus journeys per month.¹ Whilst usage had broadly seen a long-term upward trend, it is now a legitimate possibility that those figures will never be beaten. Whilst, at the time of writing, lockdown has begun to unwind, bus and Tube capacity remain far below where they were six months ago and it is entirely possible that they will remain much diminished for some considerable time. Even with the assumption that Covid-19 will be defeated and social distancing will end, it is far from clear that those who return to commuting will tolerate overcrowded conditions that most previously took for granted. Legitimate questions are being asked about the service Londoners have and will receive in the coming months and years. It is clear that, just as today's service is very different from that of a year ago, the service in a year's time will be very different again.

This report will examine some of the most pressing issues facing London's transport provision, analyse the response to the crisis from the Mayor and TfL, and provide recommendations on lessons to learn and future operations. It will explore the changes to transport and travel we have seen in London and assess whether the Mayor of London Sadiq Khan and Transport for London (TfL) made the right decisions both with hindsight and knowing what they knew then. The report will assess how Londoners' views on transport in London have changed since the start of lockdown and consider the consequences of these attitudinal changes for London transport, given the likelihood of significantly constrained capacity for the foreseeable future. In addition this report will weigh up how, if public transport capacity will be diminished for an unknowable period of time, the gap in provision will be filled to ensure that those who need to commute are able to reach their place of work. Further to this, the report will evaluate the impact of these changes on Transport for London's finances and, therefore, its future priorities.

¹ <https://londonist.com/london/transport/journeys-in-london-by-type-vehicle>

The Story of Lockdown

On 10th January this year, TfL announced that it was ending middle and back door boarding on the New Routemaster.² The New Routemaster – affectionately known as the Boris bus – had been an innovation of the previous Mayor of London, Boris Johnson. The reason given for this change was to reduce fare evasion, but it looked an awful lot like spite on the part of the current Mayor, Sadiq Khan, who chose to remove all Oyster scanners other than at the front of the bus. This meant that when, on 17th April, TfL introduced middle-door only boarding on all London's buses³ there was little choice but to make all London's buses free.

Clearly Sadiq Khan could not have been expected to be a clairvoyant. How could he have guessed that trying to discredit one of his predecessor's achievements would cost TfL – by their own estimation – £25 million? Nevertheless, the decision was ultimately his and it was ultimately costly. At a time when lockdown ensured that bus capacity was much diminished and potential revenue would inevitably have shrunk, an ill-timed Mayoral decision meant that revenue from London's buses was completely eliminated from 20th April⁴ to 30th May⁵ – a period of almost six weeks. This period saw TfL take approximately £75 million across its entire network.⁶ This is less than 14% of the £542 million of revenue raised in the equivalent period in 2019. Given this, it is quite explicable that TfL expects to lose £4 billion of fares revenue this year due to Covid-19 and lockdown⁷. Although these numbers might make that £25 million look like a drop in the ocean, it highlights the fact that whatever problem TfL would always have faced once lockdown and social distancing became necessary, there was always the potential for poor or unfortunate Mayoral decisions to make the situation worse.

Moreover this was far from the worst mistake Sadiq Khan made during lockdown. Indeed, if searching for his greatest error, the list of possibilities is long. For example, on 3rd March Sadiq Khan told Good Morning Britain that “There is no risk in using the Tube or buses or other forms of public transport or going to a concert.”⁸ At the time there had already been at least 40 cases of Covid-19 in the UK. It is understandable that the Mayor of London would be keen to offer reassurance to commuters, but was it reasonable to take such a categorical position?

The Mayor cannot fairly be blamed for social distancing requirements, which reduced the capacity of a double decker bus to around 20 people from 87⁹, a single deck bus to around 10 from 43 and a Tube carriage from 125 passengers down to 21 with the 2 metre rule. Even with a 1 metre rule in place a Tube carriage would only increase its capacity to 31 people – and that is assuming they are all wearing masks. However it is against the backdrop of those requirements that on 18th March, the Mayor unilaterally took the

² <https://tfl.gov.uk/info-for/media/press-releases/2020/january/new-routemaster-buses-to-become-front-boarding-only>

³ <https://tfl.gov.uk/info-for/media/press-releases/2020/april/tfl-introduces-middle-door-only-boarding-across-the-london-bus-network>

⁴ <https://tfl.gov.uk/info-for/media/press-releases/2020/april/tfl-introduces-middle-door-only-boarding-across-the-london-bus-network>

⁵ <https://tfl.gov.uk/info-for/media/press-releases/2020/may/london-s-buses-to-return-to-front-door-boarding>

⁶ <https://www.london.gov.uk/questions/2020/1809>

⁷ <https://www.bbc.co.uk/news/uk-england-london-52630386>

⁸ <https://metro.co.uk/2020/03/03/coronavirus-london-tube-sadiq-khan-12339239/>

⁹ <https://www.bloomberg.com/graphics/2020-london-cycling-streetspace/>

decision to reduce the London Underground and London's buses to a 'Saturday service'.¹⁰

My Conservative colleagues and I criticised this decision at the time¹¹ as it was clear that it was likely to increase overcrowding as a reduced number of public transport users squeezed onto a smaller number of trains and buses. The Secretary of State for Health, Matt Hancock MP, also criticised the Mayor's decision¹² saying:

"Transport for London should have the Tube running in full so that people travelling on the Tube are spaced out and can be further apart - obeying the two-metre rule wherever possible.

"And there is no good reason in the information that I've seen that the current levels of Tube provision should be as low as they are. We should have more Tube trains running."

On 16th April the Mayor publicly called for the Government to make it compulsory for those on public transport to wear face masks, saying "the evidence around the world is that this is effective."¹³ Given that, as Mayor, Sadiq Khan already had the power to make masks compulsory on Tubes and buses, it very much appeared that this was an example of performative outrage from a Mayor more comfortable criticising the Government than doing his job. The Mayor was also not providing masks to bus drivers or requiring that those drivers wear them.

Nearly a month later, on 11th May, London transport workers were finally given PPE, although there was no compulsion for drivers to wear masks. At the time of writing, over three months later, the Mayor has still failed to require bus drivers to wear masks – either while driving or in bus garages. To put it another way, over four months after Sadiq Khan was haranguing the Government for failing to make it compulsory for those on public transport to wear face masks, he has still failed to make it compulsory for bus drivers to wear face masks.

Any objective analysis of the way in which TfL and the Mayor dealt with this crisis would clearly show that a great many mistakes were made. These were not, in the main, mistakes that were only identifiable after the fact and with hindsight. There were failings to ensure that staff were as well-protected as possible. We know that, tragically, a significant number of transport workers – particularly bus drivers – have lost their lives in this pandemic, although TfL has failed to provide a definitive number of deaths.

There are real questions over how well-positioned TfL was to cope with the crisis. Over the last four years Sadiq Khan has taken multiple decisions that have severely damaged TfL's finances and he has failed to keep a close eye on vital infrastructure upgrades and improvements. For example, Crossrail was on time and on budget when Sadiq Khan came to power in May 2016, with the central section due to open in December 2018. In late July, Crossrail Ltd announced that its most recent targeted opening of Summer 2021 would not be met.¹⁴ Less than a month later the Crossrail Ltd Board concluded

¹⁰ <https://tfl.gov.uk/info-for/media/press-releases/2020/march/planned-services-to-support-london-s-critical-workers>

¹¹ <https://twitter.com/Councillorsuzie/status/124280809932663603350>

¹² <https://www.telegraph.co.uk/news/2020/03/25/london-underground-coronavirus-row-sadiq-khan-government-loggerheads/>

¹³ <https://www.bbc.co.uk/news/uk-england-london-52312906>

¹⁴ <https://www.newcivilengineer.com/latest/crossrail-to-miss-summer-2021-opening-date-due-to-coronavirus-delays-24-07-2020/>

that opening in 2021 was no longer possible¹⁵ and, instead, set themselves a target of opening in “the first half of 2022”.¹⁶ Meanwhile it will require at least an additional £450 million with no guarantee that this will be sufficient. This equates to a budget overrun of nearly £4 billion, alongside over £1.5 billion of lost revenue.

On 15th May the Government’s bailout of Transport for London was announced. The deal was for “a grant of £1.095 billion and a loan of £505 million, [running] until October 2020.”¹⁷ The Government made very clear that it recognised that TfL’s revenue was significantly lower due to the pandemic and that the need for TfL to run as full a service as possible in order to maximise capacity during social distancing would require a subsidy from the Government. However the Government was also clear that a key reason why the bailout was for such a large amount of money was the failings of Sadiq Khan as the Chairman of the TfL Board over the last 4 years. To that end, in his written statement to the House of Commons, the Secretary of State for Transport Grant Shapps said:

“The settlement for TfL was needed for two reasons. Most important is the significant fall in revenue caused by covid-19. However, an important secondary factor was the pre-existing poor condition of TfL’s financial position as a result of decisions made over the last four years. Combined with significant cost increases and delays to Crossrail, this left TfL in serious financial difficulty even before the public health emergency.”¹⁸

This should have been no surprise to anyone who was paying attention. As well as the massive issues with Crossrail, Sadiq Khan has repeatedly chosen to partially freeze TfL fares at a cost of upwards of £640 million¹⁹ to TfL’s finances. The fact that he did so, despite TfL’s finances becoming worse and worse and against a backdrop of cancelling or delaying 22 out of 26 major capital transport projects over the last 4 years, underlines the Mayor’s lack of interest in sound financial stewardship of London’s transport. Instead the man who in January 2016 promised Londoners they wouldn’t “pay a penny more [for their transport] in 2020 than [they] do now”²⁰ has prioritised trying to make it look as if he has kept that promise – despite any Londoner with a Travelcard or who relies on the daily or weekly Oyster Pay As You Go cap knowing that promise has been broken.

The Secretary of State’s statement also made clear that “there will be an immediate and broad ranging Government-led review of TfL’s future financial position and structure.”²¹ It is clearly necessary. As a London Assembly Member, I favour devolution and more power for London to shape its own future. The flip side of that position is that the London Mayor must be responsible for his own mistakes. If not, then the case for

¹⁵ <https://www.theguardian.com/uk-news/2020/aug/21/crossrail-delayed-again-until-2022-and-another-450m-over-budget-tfl-covid-19>

¹⁶ <https://www.newcivilengineer.com/latest/crossrail-to-miss-summer-2021-opening-date-due-to-coronavirus-delays-24-07-2020/>

¹⁷ <https://www.gov.uk/government/news/government-grants-transport-for-london-funding-package>

¹⁸ <https://www.parliament.uk/written-questions-answers-statements/written-statement/Commons/2020-05-18/HCWS240>

¹⁹ <https://www.standard.co.uk/news/transport/tfl-admits-it-can-afford-sadiq-khans-fouryear-tube-fare-freeze-a3266231.html>

²⁰ <https://www.standard.co.uk/comment/comment/sadiq-khan-how-i-could-freeze-our-transport-fares-from-now-until-2020-a3147976.html>

²¹ <https://www.parliament.uk/written-questions-answers-statements/written-statement/Commons/2020-05-18/HCWS240>

devolution is completely undermined. It is vital that we are able to look under the bonnet and really examine the decisions of the last 4 years.

Transport for London will soon need another bailout²² and all parties need to be able to consider how much of the current situation was due to events beyond Sadiq Khan and TfL's control and how much was due to ill-considered decisions where no one else was to blame. The review of TfL's future financial position and structure should do that.

Equally, if a financial review is necessary, there is a strong case for an independent review that examines the Mayor's decisions during this pandemic. This would assess whether more could and should have been done to enable those Londoners who needed to travel during lockdown to do so as safely as possible, whether the safeguarding of Tube and bus staff was done to an acceptably high standard and if the Mayor effectively used all the powers at his disposal. In May I called for an independent investigation into London transport workers dying of Covid-19.²³ The Mayor agreed and hence there is currently an ongoing Review into coronavirus infections and deaths among bus workers by the UCL Institute of Health Equity and chaired by Sir Michael Marmot. However this work is being done at the instigation of TfL and the Mayor so it is not the independent review that London needs. Instead an independent investigation with full access to all internal e-mails and minutes of meetings would enable a frank and full assessment and would genuinely inform the public of what the Mayor and TfL did well and which decisions were damaging errors.

Londoners' Perspectives

There has not, as yet, been much analysis done on the public's view of the decisions that the Mayor and Transport for London made during the Covid-19 pandemic. Indeed, it may be the case that most members of the public are not yet fully aware of the Mayor's role in those decisions. An independent inquiry, that considers the choices made in detail, looks at the alternatives and seeks to assess both whether better choices could and should have been made and why they were not, could usefully inform Londoners about the decisions made during lockdown. As more Londoners and more commuters head back to work it seems likely that there will be more focus on those issues.

We should also see the extent to which the experience of the Covid-19 pandemic, lockdown and social distancing has impacted Londoner's views on transport, commuting and how they want to work. It should be possible to gain greater understanding of the way in which people now view the transport network and how they plan to make use of it. We may well discover two oppositional trends with some people anxious to return to some form of normality - even if this means taking an increased risk - and the behaviour of others permanently changed. It seems possible that Londoners may seek to avoid public transport in the short-term, with the intention of expanding their use of it over time. They may wish to actively avoid rush hour wherever possible. Or, perhaps, they might try to avoid the Tube, but be more relaxed about using buses.

It is worth noting that there are effectively two ways in which capacity on Tube trains and buses may be constrained. The first is the more literal: due to social distancing rules, the numbers of passengers allowed on a bus or on a Tube train will be reduced to

²² <https://www.standard.co.uk/news/transport/tfl-second-government-bailout-coronavirus-a4507591.html>

²³ <https://www.london.gov.uk/questions/2020/1511>

a fraction of normal capacity, in order to ensure that there is sufficient distance between those passengers. The second constraint on capacity is behavioural: Londoners – and others commuting into London or travelling on London transport – may be less willing to be as close to their fellow passengers as was previously typical. This constraint may evolve over time. Transport users may slowly return to their previous habits. Or these new habits may become baked in and become very hard to shift, assuming such a shift is desirable. In order to assess what changes had been made and whether those changes will become permanent we commissioned a survey.

Our Survey

The purpose of the survey was to ascertain how Londoners' travel habits had changed during lockdown and to find out if they expected their new habits to become permanent.

The fieldwork was carried out between 29th June and 2nd July 2020 and prepared by YouGov PLC. The sample was 1086 London adults. The data was then weighted to give a representative picture of London. We used the options within our first question "Are you using the following forms of transport more or less now than you did before the coronavirus pandemic?" as a cross-break throughout the survey. The full details of the polling from our survey are attached in Appendix 1.

Key Findings

The survey presented some interesting results showing that lockdown has had a transformational impact on Londoners' travel habits. The headline findings were:

- A massive 51% of those surveyed had walked more during lockdown.

This may not be much of a surprise, given the significant reduction in the use of public transport. It is unclear if those walking more were replacing travel by other transport modes – perhaps choosing to walk instead of travelling for two or three stops on a bus – or if they chose to walk more as walking was one of the most straightforward and viable options for exercise during lockdown. In reality it is likely that the increase was due to a combination of both. It is worth noting that 56% of those who had walked more, believe that will be a permanent change, in comparison to 33% who think it will be temporary. Those numbers suggest a strong likelihood that London will see a lasting increase in the modal share of walking, even after the pandemic is over.

- Nevertheless, more people (21%) completely stopped using bicycles during lockdown than started cycling more (13%).

The most logical explanation for those who have given up cycling would appear to be that those respondents have been furloughed or working from home during lockdown, as there seems little reason why an habitual cyclist would switch to a different transport mode at this time. However 53% of those who have stopped cycling expect that this will be a permanent change, whilst just 17% believe the change will be temporary. In contrast, two thirds (66%) of those who have cycled more plan to make that permanent and a relatively high percentage (33%) have cycled the same amount during lockdown as always. Overall London might expect to see a relatively small increase in cycling, but an increase that pales in comparison to the expansion we can expect to see in walking.

- 54% of respondents were less confident using public transport as opposed to just 5% who were more confident.

A 49% difference is substantial, but perhaps even more notable is the difference is even more stark for the full-time employed, whereby 62% are less confident and 6% are more confident – a 56% difference. Perhaps unsurprisingly, 51% of respondents had not travelled on any public transport since lockdown began on 23rd March and this was almost exactly matched by the 50% of full time workers who had not used public transport in that time.

- A huge numbers of respondents completely stopped using mainline trains, the Tube and buses – around 50% for each – and about a quarter do not plan to start again after lockdown.

For those whose daily commute before lockdown meant travelling into and out of Central London, the majority will have used a train, the Tube or a bus or a combination of those options. It is therefore, perhaps, unsurprising that all of those modes saw such large reductions. When those who used those modes less are included, 76% reduced their usage of trains, 79% reduced their use of the Tube or DLR and 76% reduced their travel on buses. For each of those modes a significant minority of those who have used them less (26%, 17% and 20% respectively) expect this change to be permanent as do around a quarter (27%, 25% and 27% respectively) of those who have stopped using them completely.

- Although 15% of respondents were using their car or van more, 18% were using it less and 15% had stopped using it completely. Furthermore, those driving less or not at all were more likely to believe that state of affairs would be permanent (43% and 40% respectively) than those driving more (34%).

If true then that means lockdown will have contributed to around 6% of respondents giving up driving their car or van and just under 8% driving less. In comparison, just over 5% of drivers expect to drive more than they used to from now on. Although many will take the view that this is broadly a positive development, it is worth considering that there will be many differing reasons why Londoners expect to drive less. If, for example, it is because your job required you to drive but you have been – or expect to be – made unemployed then the change would be very much negative. Nevertheless, if we take the view that most of those impacted will have found options they prefer – which, after all, is the assumption that we make when people claim that walking or cycling more will be a permanent change – then there are plenty of potential benefits for London and Londoners. It is also worth noting that TfL and the Mayor have repeatedly stressed their concern about a “car-led recovery”²⁴ – and have used it to justify a number of anti-car measures, such as increasing the cost of the Congestion Charge – but this survey casts doubt on that hypothesis. If the impact of lockdown has led to some people driving more, but a greater number driving less then the case against those measures is further weakened.

It is crucial to remember that these statistics are measuring people’s expectations and so it may be that those expectations do not come to pass. Equally it is worth noting that the fieldwork was done between the 29th June and 2nd July. It would be interesting to learn how Londoners’ views have changed since. It may be that new habits acquired

²⁴ <https://www.independent.co.uk/news/uk/politics/coronavirus-uk-sadiq-khan-lockdown-london-tfl-transport-congestion-charge-a9525866.html>

during lockdown have become further embedded, or it could be that some are no longer so certain that they wish to continue with lockdown-inspired changes to their travel. Further to this, we do not know what assumptions were made by those responding to the survey. Even as capacity on public transport has started to increase, at the time of writing we do not know how long it will be before London's public transport has the capability to carry as many people as was previously the case. Therefore, even if everyone who, until February 2020, was regularly using a train, the Tube or a bus wanted to treat lockdown as a blip and return to their previous habits there is no certainty on when public transport would be capable of fulfilling their desire. Nevertheless, it seems inevitable that London will see a noticeable reduction in public transport use for the foreseeable future. This begs the question of what will fill the gap?

Consequences

The consequences of Londoners' collective attitudinal changes will be significant. They will, if nothing else were to change, leave a huge shortfall in TfL's finances. If a substantial number of people plan to avoid public transport completely or to reduce their usage of it then what will they do instead? Some will look to commute via other means, such as via bicycle or motorbike or (possibly) via electric scooter. Others may seek to minimise their commute by moving to live nearer where they work or changing jobs to work nearer where they live. However it seems likely that the great majority will work from home.

If so, this will fundamentally change the way in which the ecosystem of London operates. If the numbers of people working in central London drops by hundreds of thousands or even millions, then that will clearly have an impact on a number of other businesses from restaurants to gyms to office cleaners that rely on their custom or presence. However, it would be a mistake to assume that those potential negative consequences would not be matched by positive changes elsewhere. At a basic level, if people don't go to the gym near their office, they may well be more likely to go to a gym near their home. Similarly, whilst restaurants near their work may suffer – or have to compete with other restaurants from a smaller pool of potential customers – those working at home will still need to eat lunch and restaurants near their homes may well reap the benefit. In addition, it is important to consider the opportunity cost of the money that people currently spend on commuting. Freeing up potentially thousands of pounds – a Zone 1-6 Annual Travelcard cost £2640²⁵ – to spend on an individual's own priorities as they see fit should mean that money is spent far more productively.

If public transport capacity continues to be constrained, then a great many people will have little choice but to make other arrangements. From the perspective of Transport for London, those new habits have the potential to become ever more ingrained. Many businesses have already adapted or are actively considering what their future should look like. On the reasonable assumption that, at some point, social distancing will no longer be necessary then London's public transport could carry as many people as it did until January 2020. However, given 17% of those using the Tube less and 25% of those who stopped using the Tube completely during lockdown expect that to be permanent, the return of the capacity, whenever it happens, seems extraordinarily unlikely to be accompanied by the return of the same number of people to fill it.

²⁵ <http://content.tfl.gov.uk/adult-fares-2020.pdf>

In April 2020, the first full month of lockdown, 57.2% of Londoners did at least some working from home.²⁶ A recent Morgan Stanley Research survey suggested only 34% of UK office workers are working in their pre-lockdown normal location and showed 49% of office staff are working from home five days a week, which is the highest rate of any European city.²⁷ A June survey of lawyers and business services staff found over 50% wanted to work from home full-time after lockdown, which compared to just 2% feeling that way before lockdown had started.²⁸

The consequences of this direction of travel would be dramatic. Central London Businesses which chose to switch to all their staff working from home could potentially save millions of pounds a year by eliminating office costs. Even expanding home working to two or three days a week could enable a business to reduce office space and make savings.

There are potential downsides to a significant increase in working from home. Some have argued that it will be harder for newer employees to make a positive impression if they are not in the office. Others believe that there are real benefits to creativity if employees are working in the same environment and that chance encounters and casual conversations are of great importance. Ultimately, the market is likely to decide if companies and individuals value these relatively intangible positive aspects of the office environment. If employees feel they will struggle to impress their managers outside of an office environment then they may well look to switch to an office-based job. Similarly, if businesses find that the financial advantages of reducing or eliminating office space are outweighed and the assumed productivity gains of moving to a primarily home working environment prove illusory then they are likely to reverse course. Equally, some businesses will seek to gain the proverbial 'best of both worlds' by moving to an assumption that employees will work from home for two or three days a week and be in an office for the other days.

When 54% of Londoners – and 62% of full-time workers – have been less confident using public transport during lockdown, it is worth asking what the consequences of both Londoners' attitudinal change to public transport and ongoing issues of significantly constrained capacity will be for the long-term future of public transport in London, both in terms of demand and management? Whilst TfL has long pushed a modal hierarchy, this may be out of date. There is a need for evolution in how TfL ensures that those who need to physically return to work can do so. If capacity is severely constrained at between 15% and 25% of 'normal', covering the difference will be challenging even as the dramatic increase in home working takes much of the strain. There is a great potential for more electric bikes, motorbikes and electric scooters on London's roads – all three would save a significant amount of road space in comparison to other motorised vehicles. To encourage this, TfL should exempt all motorbikes from the ULEZ.

A further way to effectively increase public transport capacity is through staggered start times and end times. There is a clear role for the Mayor in showing leadership, taking ownership of this issue and working with big employers to coordinate it. We saw, during the 2012 Olympics, what could be achieved via proactive coordination. By speaking to employers and encouraging staggered start times for those employees who do

²⁶ <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/coronavirusandhomeworkingintheuk/april2020>

²⁷ <https://www.theguardian.com/business/2020/aug/05/uk-office-workers-slower-to-return-to-their-desk-after-covid>

²⁸ <https://www.rollonfriday.com/news-content/exclusive-five-out-ten-lawyers-want-work-home-good>

commute into the office the Mayor could ensure that many more commuters could use public transport whilst remaining socially distanced. At the other end of the day, the Mayor could work with pubs and service companies to encourage people to hold back their return home until later.

The New Normal

The Porter Hypothesis suggests that environmental regulations can stimulate innovation and thus increase productivity.²⁹ A 2015 study applied the same logic to Tube strikes and suggested that they too might have hidden benefits.³⁰ The logic of this argument is that most commuters will find a journey and stick to it, repeating the same route every day that they travel to and from work. However many of those journeys will not be the most efficient route. “The researchers from the University of Oxford and the University of Cambridge analysed 20 days’ worth of anonymised Oyster card data, containing more than 200 million data points, in order to see how individual Tube journeys changed during the strike.”³¹

Consider what happens when a Tube Strike stops commuters from using their habitual route to and from work. Those commuters are forced to try alternative options. Some options will inevitably prove slower and less efficient. However, other options may be faster, healthier or more enjoyable. The study found that approximately 5% of commuters “decided to stick with their new route once the strike was over.”³²

If disruption drives innovation, then lockdown may well lead to improved choices that will become embedded, even after social distancing is no longer a factor. This will represent, for want of a better term, the new normal. Decisions which were forced onto people by necessity, thanks to lockdown and the sharp reduction in public transport capacity that it entailed, may meet with enough people’s approval to become a long-term choice. This might mean using a Santander Cycle (commonly known as a ‘Boris Bike’) for part of your journey instead of completing it all via the Tube. Or it might mean recognising that two Tube stations which look to be some distance apart on the Tube Map are actually only a short walk apart.

The evidence we have seen shows that the period of lockdown seems to have worked in much the same way. As millions of Londoners were unable to commute as normal, the vast number had little choice but to work from home. Whilst some have strongly disliked the experience, polling shows that large numbers have decided they would prefer to avoid their commute and work from home much more often or even full-time. For example a YouGov survey for London First found 22% of Londoners plan to work from home more often after lockdown and 16% have no intention of using public transport “in the foreseeable future”.³³ It seems clear that the world of work will not return to how it was.

As if to underline the point, in August the FTSE-listed fund manager Schroders scrapped its pre-lockdown requirement for employees to come into the office for at

²⁹ <https://www.tandfonline.com/doi/full/10.1080/10438599.2016.1202521>

³⁰ <https://www.ox.ac.uk/news/2015-09-15-london-tube-strike-brought-economic-benefits-workers>

³¹ <https://www.ox.ac.uk/news/2015-09-15-london-tube-strike-brought-economic-benefits-workers>

³² <https://www.ox.ac.uk/news/2015-09-15-london-tube-strike-brought-economic-benefits-workers>

³³ <https://www.onlondon.co.uk/fifth-of-londoners-plan-to-work-from-home-more-often-amid-anxiety-about-public-transport/>

least 4 days a week.³⁴ Similarly the 'Big 4' accounting firm PWC "expects the majority of its 22,000 UK staff to spend some of their time working remotely, even after the Coronavirus crisis passes."³⁵ Kevin Ellis, PWC's Chairman and Senior Partner was quoted as saying "There's no question that lockdown has done away with presenteeism... It's shown many business leaders that their people can be productive, engaged and happy working from home." There are no shortage of examples of other City firms taking similar approaches.

For employees, working from home may save thousands of pounds a year in commuting costs, as well as hundreds of hours that would otherwise be spent travelling to and from work. Similarly many businesses that might previously have been nervous or unconvinced about letting their employees work from home have become converts, persuaded by the quality of their employees' work and the savings to be made by downsizing office space. On 1st June The Independent reported on a survey showing that the percentage of employers content for their employees to work from home had risen from 45% before lockdown to 70%.³⁶ It also found 57% intend to adapt the way they have worked to facilitate home working in the future. Given that a 2018 poll found two thirds of Londoners considered using public transport the most stressful part of living in London³⁷ it is unsurprising that there is a desire to do something else. Those numbers would suggest that even where home working isn't possible, there exists a strong desire amongst a great pool of people to avoid public transport if other possibilities available.

Assuming the polling evidence holds true, then in terms of London transport we should be prepared for this to be a new normal. The approximately two million people³⁸ making 5 million Tube journeys every weekday before the outbreak of Covid-19³⁹ seems likely to see a significant reduction. Naturally it will not be possible to establish the precise shape of the new normal until the threat of Covid-19 is a thing of the past. It could be that previous work patterns hold more appeal than appears to be the case from this vantage point. Yet, as we have seen, polling evidence suggests otherwise.

Much analysis of this assumes a relatively static job market, with people seeking to adapt the way in which they do the same job they had. This is understandable as it is a more straightforward approach, but it fails to take into account such issues as how many people will seek to change jobs to fit their new preferences. So, for example, if an employee has enjoyed working from home and finds that their employer wants them to return to being primarily based in an office, will he or she choose to stay in their current job or look to move jobs? Will we see an increase in people prioritising jobs where they can work from home? Similarly, if home working is seen as increasingly desirable, will businesses seek to emphasise jobs' suitability for home working in order to attract the strongest candidates? Both trends may see countertrends where some people – those who actively prefer working in an office – look to move jobs if their current employer decides to switch to 100% home working. Nevertheless, polling evidence suggests that the trend towards working from home will be more significant.

³⁴ <https://www.cityam.com/schroders-becomes-first-major-city-firm-to-make-home-working-permanent/>

³⁵ <https://www.bloomberg.com/news/articles/2020-08-16/pwc-expects-majority-of-u-k-staff-to-work-remotely-after-virus>

³⁶ <https://www.independent.co.uk/news/business/news/working-from-home-cheap-save-office-business-boss-a9542781.html>

³⁷ <https://www.businessleader.co.uk/how-long-is-the-daily-work-commute-for-the-average-londoner/44325/>

³⁸ <https://www.london.gov.uk/your-commute>

³⁹ <https://tfl.gov.uk/corporate/about-tfl/what-we-do#on-this-page-1>

We may also see a trend where, even where home working is not possible, employees will look for other ways to reduce their commute. This might mean people looking to move closer to their place of work, or it might mean people looking to move jobs so that their office is nearer their home. The Government's decision to extend Permitted Development Rights from September⁴⁰ should make it easier to change commercial buildings to residential use. If less office space is required in the City of London and Canary Wharf, there would appear to be a logic in converting some offices to flats and creating an opportunity for those who do want to work in an office to be able to do so whilst minimising their commute. Such a possibility may well appeal to some young, upwardly mobile people. Meanwhile there is a legitimate question over whether people will be willing to sacrifice pay in order to significantly reduce their commutes and, if so, by how much.

Finally it is worth considering more complex possible consequences of a shift to home working as an increased part of the new normal. For example, if a business switches to 5-days a week working from home, then there is little constraint on where its employees live. As long as employees have a laptop, a desk and fast, reliable Wi-Fi they would be able to work anywhere. One possible result of this could be that more employees take the opportunity to move further away from London. Connectedly, people living too far from London to commute in everyday, would be able to apply for 'London' jobs that they would previously have been unable to consider. In fact, even if a business required their employees to come to the office for a day or two a week, London's commutable umbrella would be significantly expanded. For example, consider someone living in Crewe. The fastest current train into London takes 1 hour 42 minutes. Few people would commit to a daily commute that required nearly three and a half hours a day on the train. However such a journey would be far more acceptable if it were only needed on a day or two each week. Equally a resident of Crewe or Shrewsbury or York, might well be able to consider a job which required two consecutive days a week working in London if they could work from home for the rest of the time. Alternatively a person with a family might choose to move to Crewe, where they could almost certainly buy a larger property than they could afford in London with a garden for the children and – probably – a smaller mortgage. None of this is to suggest that this is what businesses or employees ought to do – such decisions are best left to those directly affected by them – but it is worth highlighting the possibilities of a country in which working from home is normalised and a lot more prevalent. The consequences of such a structural change would be profound.

⁴⁰ <https://www.gov.uk/government/news/pm-build-build-build>

TfL Changes

Andy Byford, the new Commissioner of Transport for London, recently gave an interview to The Evening Standard⁴¹, where he was asked “How long will it take to get passenger numbers back to pre-Covid levels?” It is an understandable question and he gave a reasonable answer, but TfL should give strong consideration to the possibility that passenger numbers may not return to where they were. What does TfL look like if a significant percentage of 2019 commuters switch to working from home indefinitely? What would need to change in the service it provided? How should it deal with the inevitable financial shortfall? How could TfL adapt in order to best serve Londoners’ needs?

It is worth reflecting on the organisation that Andy Byford is now leading. In New York, as President of the New York City Transit Authority, he was known as ‘Train Daddy’⁴² for his work in revitalising the New York City Subway – one of the oldest public transit systems in the World. In London he is responsible for the London Underground – the oldest public transit in the World⁴³, with the Metropolitan Line opening a full 41 years before the New York system. The London Underground is heavily unionised and under the current Mayor there have been more strikes per annum than under either of his predecessors. Meanwhile we have seen a consistent ratcheting up of pay and conditions so that the average base pay of a Tube driver is now £55,011, with most drivers paid between £60,000 and £70,000 and receiving 43 days of annual leave.⁴⁴ There have been far too many examples of Tube strikes to seek to reinstate workers who were justifiably sacked, such as in 2018 when ASLEF managed to close the Central Line and Waterloo & City Line in support of a driver “who was sacked for opening doors at a station while two carriages were still in a tunnel”⁴⁵ or in 2015 when the RMT tried to force the reinstatement of a driver who “had been dismissed for failing two random breath tests”.⁴⁶ The ‘job for life’ mentality, combined with excessive pay⁴⁷ and bonuses⁴⁸ has long been a nettle that desperately needed grasping. With total TfL staffing costs currently exceeding £2.17 billion per annum,⁴⁹ it is clearly unaffordable at this juncture.

In 2013 Roger Evans, my predecessor as the London Assembly Member for Havering and Redbridge, wrote and published a report entitled Home Works: Why London Needs To Expand Home Working.⁵⁰ The report explicitly made the case for home working, arguing that it had the potential to deliver benefits for the public sector, the private sector, employees, employers and the environment. Roger later wrote a second report

⁴¹ <https://www.standard.co.uk/news/transport/andy-byford-transport-for-london-interview-a4496631.html>

⁴² <https://www.independent.co.uk/news/uk/home-news/transport-for-london-commissioner-andy-bryford-train-daddy-a9534971.html>

⁴³ <https://www.railway-technology.com/features/worlds-oldest-metro-systems/#:~:text=The%20London%20Underground%20is%20the,Credit%3A%20Thaler%20Tamas%20%2F%20WikiCommons>

⁴⁴ <https://www.standard.co.uk/news/uk/tube-driver-salary-holidays-working-conditions-a3982211.html>

⁴⁵ <https://www.standard.co.uk/news/transport/central-line-tube-strike-chaos-for-thousands-as-drivers-walkout-over-colleague-sacked-for-opening-a3954341.html>

⁴⁶ <https://www.bbc.co.uk/news/uk-england-london-31372269>

⁴⁷ <https://www.standard.co.uk/news/london/transport-for-london-earning-more-100000-a4495026.html>

⁴⁸ <https://www.standard.co.uk/news/transport/revealed-tfl-plans-85m-in-annual-bonuses-for-top-managers-a3686246.html>

⁴⁹ Page 132, <http://content.tfl.gov.uk/tfl-annual-report-2019-20.pdf>

⁵⁰ https://bceec56b-1210-4f10-95fb-8537ce6eebd5.filesusr.com/ugd/047866_943d2ea4e9f44c73959abcb6f4fc6abc.pdf

Commuter Payback⁵¹, that went into more detail on the flexible ticketing options that would facilitate increased home working – as well as encouraging Travelcard holders to cycle to work more often and remove a structural unfairness in the ticketing system for those who worked part time. As a direct result of these two reports, TfL introduced the daily and weekly caps on PAYG Oyster Cards. This meant that the penalty for those who only needed to commute for 2 or 3 days a week was eliminated.

An increase in home working is both a challenge and an opportunity for TfL. From one perspective increased home working correlates to fewer Tube and bus journeys, thus reducing TfL fares revenue. However it is also worth considering that TfL has consistently aimed to expand and upgrade transport infrastructure – and has needed to do so in order to keep up with increased demand. Lower usage offers the chance to save on capital projects. Looking at projects anew and taking the chance to reappraise how best to enable Londoners and visitors to London to travel around the city would be a worthwhile endeavour.

Furthermore, lockdown has put rocket boosters under the pre-existing trend towards the expansion of home working. Even if the Mayor and TfL wanted to reverse that trend it seems unlikely there is anything they could do. Frankly that is as it should be. It is not for the Mayor, or the Government, to seek to try and second guess the decisions of businesses and their employees. Instead the Mayor should lean into the change. He should work with the grain of his constituents' decisions and not seek to squeeze toothpaste back into the tube – or, indeed, people back onto the Tube. That is not to suggest that the London Underground and London's buses will not continue to be of the utmost importance. The Mayor and TfL have a duty to ensure that people can travel around London. Nevertheless, achieving this will require a very different approach.

The Mayor has little choice but to reconsider Transport for London's spending priorities. Already we have seen an emergency TfL budget in February and a revised budget⁵² in July, in which it was revealed that at the peak of lockdown, TfL was losing £80m per week in passenger income in comparison to the adopted budget from February. The Government bailout agreement totalled £1.6 billion with an additional £300 million contingency to cover TfL until the end of October. TfL predicted it will need to utilise £1.5b of the bailout, without the need to draw on the contingency. However, TfL's expectation in July was that over the full year it will need £3.5 billion instead of the £3.2 billion that was originally proposed in February's emergency budget, so the non-use of this contingency seems rather moot. In July TfL was running £119 million ahead of the prediction in its original emergency budget, due to slightly higher passenger income than anticipated. However TfL anticipates needing £2.9 billion of support in 2021/22, so continuing bailouts are still a significant factor in TfL's assumed finances. TfL estimates that whether or not a second virus spike happens could impact passenger income by £735 million over the course of the year.

As of the July budget, TfL announced projects that it still believed were deliverable within that spending envelope. These included: the delivery of the Northern Line Extension and Barking Riverside Extension, the Streetspace programme (which entails a further 20 km of cycle lanes, and more than 15,000m² of widened footpaths) step-free access at nine stations, a new fleet of trains for Piccadilly Line and the DLR, the completion of the planned expansion of ULEZ to the North/South Circular by October

⁵¹ https://bceec56b-1210-4f10-95fb-8537ce6eebd5.filesusr.com/ugd/047866_02883b9e1db14dc49df930b5df085209.pdf

⁵² <http://content.tfl.gov.uk/board-20200729-item09-finance-report-revised-budget.pdf>

2021 and the restarting of proactive road maintenance. Meanwhile TfL also announced the pausing of various projects that would require additional funds that are not in the current budget including: works to stabilise Hammersmith Bridge, ten further step-free access improvements, new signalling for the Piccadilly line, the Croydon Fiveways improvement scheme, the Sutton Tramlink and the South Kensington capacity upgrade. Instead of simply offering up a wish list to central Government, TfL should explain how new projects would enable a different approach. For example the introduction of driverless trains would enhance capacity and change the dynamic that has seen near continuous ratcheting up of pay and conditions for certain Tube staff.

The Mayor and TfL will inevitably have to reconsider their transport spending priorities again. Just as lockdown has forced employers and employees to reappraise whether the way they have been operating was optimal, it would be deeply wasteful if TfL failed to take the opportunity to do the same. For example, TfL might move their hugely expensive central operations centre at Palestra in Southwark to, perhaps, Croydon where an equivalent building could easily cost less than half the amount. Equally there may be a case for investing in the technology to enable the banks of screen-watchers to work from home.

The latest budget may hold for the short-term, but once lockdown is over there will be a need to reassess how best to spend limited funds in the medium and longer-term. Priorities will change, both from the perspective of TfL having less money than previously assumed and from the perspective of the new normal requiring different solutions to the old normal. Consideration should be given to whether the current setup of TfL fit for purpose. There is a case for some significant changes – and these may well be highlighted by the “immediate and broad ranging government-led review” that was a condition of the Bailout Agreement – but the extent to which sweeping structural changes are prudent at this time is an open question.

Nevertheless, it will be crucial for TfL to adapt to London as it is, rather than trying to squeeze London back into the shape it was before lockdown. The 17th Century French politician Jean-Baptiste Colbert famously argued that “The art of taxation consists in so plucking the goose as to procure the largest quantity of feathers with the least possible amount of hissing.”⁵³ Sadiq Khan certainly needs to find ways of procuring more feathers, but his decisions so far seem more likely to kill the goose.

For example the Mayor has chosen to increase the Congestion Charge from £10.50 per day to £15, whilst expanding its hours of operation by an additional 4 hours from 7am - 6pm to 7am - 10pm and making it operational for 7 days a week. This ill-considered decision highlights a key dilemma that the Mayor and TfL face; the temptation to take any opportunity to raise more money, regardless of the negative consequences for Londoners. Whilst it is understandable that the Mayor was unable to resist the temptation to increase the cost and scope of the Congestion Charge and squeeze more money out of motorists, nevertheless it was a clear mistake.

The purpose of Transport for London is to help keep London moving. If it imposes policies that ensure that some Londoners can no longer afford to travel then it has failed. If the Mayor wants more people in Central London then he needs to recognise that that means opening up Central London. Charging people who might previously have driven into Central London shortly after 6pm in order, for example, to go to dinner or the theatre, will inevitably reduce the numbers eating in Central London restaurants

⁵³ https://en.wikiquote.org/wiki/Jean-Baptiste_Colbert

or going to the theatre. Equally, the expansion to weekends has been damaging for churchgoers, many of whom are used to driving from outer London into the centre. The changes have been problematic for charities that rely on volunteers. It should go without saying, therefore, that the fact that the Mayor could raise money via a particular avenue does not mean that avenue should be pursued. TfL is – or should be – a means to an end. It should exist to facilitate Londoners and non-Londoners ability to travel around London and to help London thrive. If raising more money would mean damaging those objectives, then a different way of achieving this should be found.

How Should TfL Proceed?

The Mayor and TfL should maximise public transport capacity so that as many people as possible can use public transport, whilst recognising that there are good reasons why actual usage will be down for a long time – perhaps permanently. The fact that Sadiq Khan chose to run a ‘Saturday service’ at the height of lockdown led directly to unsafe overcrowding and must inevitably have played a part in reducing Londoners’ confidence in public transport. Regaining people’s trust will take time, even once social distancing is no longer required. To that end, there is a need to make public transport as safe as possible, but plan for usership of the Tube and London’s buses to remain lower than pre-Covid. Last year 82.4% of TfL’s revenue came from passenger fares income.⁵⁴ It seems unlikely that percentage will be beaten for a very long time. Indeed, as TfL’s Annual Report and Statement of Accounts in July 2020 showed, fares income fell from “£4,854m in 2018/19 to £4,751m in 2019/20”, reflecting the impact of coronavirus in March 2020, which compounded an underlying reduction in demand growth on the Underground and buses seen throughout the year.”⁵⁵ In other words, even before the considerable impact of lockdown, there was a downward trend in usage on both the Tube and London’s buses. Blithely assuming that things will get back to normal eventually would be a mistake.

Earlier I wrote about Roger Evans’ Home Works and Commuter Payback reports, which argued for ticketing changes that took account of changes in working patterns to help facilitate home working and part-time working as well as provide an incentive for commuters to cycle into work for a day or two a week. The previous Mayor and TfL introduced the Pay As You Go Oystercard Daily and Weekly Caps, which reduced the cost of travel for those who might only need or choose to use public transport to get into work for 2 or 3 days a week. In the light of the seemingly inevitable home working revolution that London is about to see, there is a further step that TfL and train operating companies should take. Historically, those commuting into London everyday were well advised to buy an annual season ticket, which gave them a year’s travel for the cost of 40 weekly season tickets.⁵⁶ Similarly there was a discount for a monthly season ticket, which costs less than 4 weekly season tickets, and a weekly season ticket, which is cheaper than 4 daily return tickets. It is easy to see the advantage to public transport users, but there is also an advantage to TfL and train operating companies in terms of both anticipating demand and in terms of receiving a significant amount of their revenue in a pre-use lump sum.

Clearly some people, who used to commute daily, will now work from home for 5 days a week and will no longer need to buy a season ticket. However many others will wish to

⁵⁴ Page 72, <http://content.tfl.gov.uk/tfl-annual-report-2019-20.pdf>

⁵⁵ Ibid

⁵⁶ <https://www.thetrainline.com/season-tickets>

have a more varied calendar. Some may regularly work from home for 2 or 3 days a week and commute into Central London on the other days. Others may look to work from home most of the time but may find themselves going through periods where they need to commute for a few days at a time. It would make sense if TfL and train operating companies worked together to offer the more flexible ticketing option of a carnet. A number of train operating companies already offer a version of these.⁵⁷ They enable you to buy a booklet of tickets at a discount to cover a journey that you expect to take relatively frequently, but not every day.

An equivalent of a carnet Travelcard might allow you to buy 50 days of travel to be used over 6 months, at a 20% discount in comparison to buying 50 daily Travelcards. At the time of writing a daily Travelcard for Zones 1-6 costs £19.10 so 50 daily Travelcards would be £955. With a 20% discount, this would be reduced to £764. In comparison, a monthly Zones 1-6 Travelcard costs £253.50 and three monthly Travelcards, which would cover around 64 working days, would cost £760.50. The carnet would be more expensive on a daily basis than the monthly Travelcard, but cheaper than the daily Travelcard. From the perspective of TfL and Train Operating Companies, it might encourage more journeys from those who plan to mix working from home and commuting. It would also help facilitate the model that I discussed earlier of people living far enough from London that they would be unwilling to commute on a daily basis, but being content to commute in for one or two days a week. In that respect, introducing carnet tickets would be a way of encouraging new commuters at a time when many have chosen to reduce the amount of commuting they do.

With fares revenue set to plummet Transport for London will need to cut its cloth accordingly and raise more money, but it must not do so by hammering those who need to travel. We have already seen over the last 4 years that Sadiq Khan's instinct whenever he wants to raise more money is to try and target motorists. Indeed we have seen how quickly he chose to expand the cost and scope of the Congestion Charge from the 22nd June. This is why he plans to expand the Ultra-Low Emission Zone in October 2021, despite the fact that doing so will be particularly damaging for poorer Londoners and families who cannot afford to replace their car. In his report *A Breath of Fresh Air*⁵⁸ my colleague Gareth Bacon calculated that installing the cameras to make the ULEZ 18 times larger than it is currently will cost £780 million. Considering the Mayor clearly expects the ULEZ to raise revenue for TfL this suggests he expects it to squeeze an awful lot of money from Londoners. Similarly, I have little doubt that the Mayor would like to introduce road user charging in London. Gareth Bacon demonstrated in his report *Highway Robbery: The Case Against Road Pricing in London*⁵⁹ this would be a damaging mistake. Such a scheme would expect to raise approximately £1,349,504,000 from Londoners, equating to £519 per person. This would be on top of the £731 per year that the average driver already pays in motoring taxes.⁶⁰

So, if not by stinging motorists, how should TfL raise more money? First, TfL should look to maximise revenue from its capital assets. Policies such as Sadiq Khan's requirement that 50% of new build homes must be affordable will, to the extent that they constrain

⁵⁷ <https://www.mytrainticket.co.uk/carnets>

⁵⁸ https://bceec56b-1210-4f10-95fb-8537ce6eebd5.filesusr.com/ugd/047866_fe71fe63323e46f08194b76f005e7280.pdf

⁵⁹ https://bceec56b-1210-4f10-95fb-8537ce6eebd5.filesusr.com/ugd/047866_268533e589504ec89b218c8ecb52b7de.pdf

⁶⁰ <https://www.independent.co.uk/life-style/motoring/motoring-news/uk-drivers-pay-average-of-731-a-year-in-tax-figures-show-a6821201.html>

revenue, be unaffordable. From the perspective of the GLA Conservatives, this would be a positive change as there is evidence that this policy has reduced both the total number of new homes being built in London and the total number of new affordable homes. However for the current Mayor, u-turning on one of his flagship policies would be embarrassing. It would be sensible, therefore, for him to make clear that there will need to be a significant number of changes to both Transport for London and London transport more generally in the light of lockdown and the likely permanence of some of the changes it has precipitated. The Mayor could make clear that he could not have been expected to anticipate the necessity of these changes when he was elected in May 2016, but that it is his duty to do whatever is necessary to keep TfL functional and able to ensure Londoners and those from further afield are able to travel around London as and when they need to do so.

London cannot afford any more fares freezes to try and buy Sadiq Khan cheap headlines and electoral advantage. Luckily, although he has since tried to pretend otherwise, Sadiq Khan had already promised to raise Tube fares next year before the pandemic and lockdown.⁶¹ Given he was warned before he became Mayor, by all his 2016 Mayoral opponents, that his planned fares freeze was unaffordable and that it would damage TfL's finances, it is only sensible that he will belatedly agree to a moderate fares increase. If he should be tempted to try and renege on his promise, the Bailout Agreement made his promise in February a requirement.

The Government should devolve London's share of Vehicle Excise Duty (VED) to London with the proviso that this money is spent on road maintenance. This would equate to approximately £550m a year. The devolution of VED is a measure that has cross-party support on the London Assembly. The GLA Conservatives believe that the requirement that the money is spent on road maintenance is necessary, given that the Mayor has repeatedly scrapped spending on proactive road maintenance over the last 4 years.

TfL will also need to save money. The Mayor should launch a zero-based budgeting review to consider all TfL spending anew in the light of the new normal. The GLA Conservatives have made a great many suggestions for ways in which TfL should save money in the past, but two that stand out are ending nominee passes – which allow TfL employees to nominate any one individual for free travel, so long as that individual lives with them – and the ending of gold-plated pensions. The latter has the potential to save hundreds of millions of pounds a year as TfL's employer contributions are more than double the 13 per cent average Local Government Pension Scheme contribution. However, as TfL pensions are “governed by a Trust Deed and Rules and not through statute like most other public sector pensions”⁶² this would require Government legislation to enable TfL to reduce its contributions. The Mayor, who has for too long allowed TfL to live beyond its means, should lobby the Government for such a legislative change.

TfL and the Mayor will also need to re-examine their current spending to ensure limited funds are spent as effectively as possible. For example, there will be a need to redo the business case calculations for all ongoing and potential projects based on the new normal. In other words, business cases that made assumptions on passenger demand based on pre-Covid-19 travel will be out of date. Some projects will be far less viable than they appeared to be last year, whilst other projects may well become more

⁶¹ <https://www.standard.co.uk/news/transport/i-ll-end-freeze-on-tube-fares-if-i-m-elected-again-admits-sadiq-khan-a4386516.html>

⁶² <https://www.london.gov.uk/questions/2014/4941>

desirable. To take a non-TfL example, HS2's business case assumed that the West Coast Mainline had very little spare capacity. So what happens to HS2's business case if an increase in home working and video conferencing leads to the usage of the West Coast Mainline being reduced by, for example, 40%? It would make no sense to plough on with a project that was previously deemed desirable, based on a business case that no longer bears any relation to reality. More broadly, TfL is used to funding capital projects and upgrade work from its revenue. If its revenue drops significantly then it will need to either find ways to increase revenue or reduce its spending on capital projects. In reality, both are likely to be necessary. On top of this, the need to finish Crossrail is likely to trump all other projects, but the anticipated revenue from Crossrail may well be much lower than previously assumed.

Understandably, TfL often focuses on the transport infrastructure and services that it provides itself. However with money tight, TfL should make a virtue of necessity and do all it can to facilitate and encourage the provision of services and infrastructure that do not require TfL to spend any money. There is clearly a role for TfL in setting the framework within which these schemes would operate or in guiding what sort of projects are necessary or desirable. However, if TfL fails to take the strategic lead in the way it should then there is scope for London's boroughs – either individually or working together – to circumvent TfL and deliver for Londoners.

In terms of services that will help people travel around London, there is a definite role for e-bikes, e-scooters, dock-less bikes and car clubs – to name but four. None of those options need cost TfL any money, but they have the potential to help transport millions of people around the capital. Privately-owned e-scooters are currently illegal on public roads, but the Government recently opened the door to trials for rented e-scooters.⁶³ These are already popular in cities around the world and there is a clear opportunity for them to become a popular option in London. Similarly, there is great potential for both dock-less bikes and e-bikes to be used by many more people in London over the coming years.

At first glance, car clubs may seem to be an entirely different proposition. However a report I published in 2018, *Cutting Congestion: The Case for Car Clubs*⁶⁴ established some key reasons why car clubs facilitate the more efficient use of road space and encourage walking and cycling. Every car club car on the road leads to 13.4 fewer private cars⁶⁵ as drivers choose to give them up. Whereas a private car is a sunk cost, with owners having an incentive to use the car that they already own, each car club journey is one that a car club member considers on its merits. Consequently, faced with a short journey, a car club member is more likely to consider walking or cycling instead of driving.

Additionally, TfL should consider where it is possible for the private sector to deliver infrastructure on a similar model to the Silvertown Tunnel. This would mean a private company bids for the right to build a scheme and then reclaim a set amount of revenue via tolling. Although the Silvertown Tunnel itself is a divisive project, the concept itself should not be. If the concept that new infrastructure will often require tolling is accepted then, even once the project itself has been paid for, there is the opportunity for the toll to be converted to a charge to provide an ongoing revenue stream for

⁶³ <https://www.bbc.co.uk/news/uk-53219331>

⁶⁴ https://bceec56b-1210-4f10-95fb-8537ce6eebd5.filesusr.com/ugd/047866_7129249f96c845ddbb04105855cafe09.pdf

⁶⁵ <https://www.carplusbikeplus.org.uk/wp-content/uploads/2017/03/Carplus-Infographics-2017-London-AW.pdf>

Transport for London. Such an option would be far more reasonable than, for example, the introduction of road user charging as it offers a direct payment for a new piece of infrastructure that would otherwise not exist.

Connectedly, there should be recognition of the tremendous service that the black cab industry provides to London, helping ensure that Londoners can get where they need to go and reducing the number of private cars on the road by doing so. The Mayor's decision to block off various Central London roads from black cabs was a mistake that should be reversed. There should be no roads where buses can go, but taxis cannot.

The Impact on London Life

Let us imagine, for the sake of argument, that the numbers of commuters into Central London on any given weekday is reduced by 40% from what it used to be in January 2020. What would be the impact of such a change on London life?

Lockdown has meant a severe disruption to London's ecosystem, but – in part, due to the Government's furlough scheme – many jobs have been held in place, waiting for a return to normality. As it becomes clear that there will not be a return to the pre-Covid-19 state of play, some of those jobs will move or disappear. If there are fewer commuters travelling daily into Central London then the new numbers of workers will be unable to support the same number of jobs at the same number of Central London restaurants, pubs and coffee shops. Some have theorised that fewer people in Central London during the day may negatively impact the night-time economy, with a knock-on impact on theatres, nightclubs and live music venues. It is worth noting that the advent of the Night Tube in 2016 damaged outer London nightclubs because clubgoers no longer needed to ensure they were near home after midnight in order to avoid a night bus home. Although the Night Tube is not currently operating it is noteworthy that our survey found 77% of 18-24 year olds believed that changes to their use of the Underground during lockdown would be temporary, compared to 10% who thought they would be permanent so once the Night Tube returns, so should many more nightclub goers. Equally, it is clear that Londoners will shift their behaviour in ways that are not always easily anticipated.

It is important to recognise that the greatest impact is created by a reduction in jobs themselves. If a job is still being performed then at least some of the secondary benefits should be transferred, rather than lost. For example, instead of going to a pub or gym near their Central London workplace, a home worker may go to a pub or gym near their home. Alternatively, they may save money that would have been spent in Central London and spend it on something else in Outer London. If more people are working from home, then restaurants near those homes may benefit from their custom more frequently than otherwise. It will not always be easy to see how these shifts occur, as it is easier to observe one area becoming quieter than many areas becoming marginally busier. Nevertheless it is important not to try and judge the overall impact of changes just by looking at Central London.

Of course increased home working is unlikely to be the only change. As noted earlier, it is possible that some Londoners will seek to move into Central London as a way of reducing their commute. Whilst this is likely to be a relatively minor trend, it may have an impact. It will also be interesting to see how many businesses seek to retain the benefits of the office, whilst finding other ways to help employees reduce their commutes. For example, will we see more dispersed working with businesses reducing

their office space in Central London, but investing in a number of smaller ‘satellite’ offices in outer London?

Finally, if theatres and other live entertainment venues suffer from the reduction in workers commuting into Central London, it becomes ever more vital that the Mayor makes sure it is as easy as possible for theatregoers to head into Central London in the evening and at weekends. To that end, his decision to increase the Congestion Charge hours from 6pm to 10pm and to weekends was precisely the wrong approach – one that could have been designed to damage the night-time economy and the City as a whole. The sooner that decision is reversed – it has technically been described as temporary – the better.

Quality of Life

There is no simple way to assess the impact of these changes of Londoners’ quality of life. Virtually any variation from the previous status quo will be positive for some people and negative for others. Or it will have both benefits and disbenefits to any given individual, but even that individual might struggle to usefully assess whether the overall change was for the better or for the worse. For example, if fewer people are commuting into central London, then there will be fewer jobs that are reliant on commuters. However this should also lead to less congestion, lower vehicle emissions and improved air quality. Such a change would seem likely to boost the quality of life of the majority, but not necessarily for those people working in commuter-dependent jobs.

Many of those who favour an increased amount of home working believe it will improve their quality of life. Home workers avoid commuting, which for the average Londoner means saving 74 minutes a day⁶⁶. As well as the time saving, the financial saving can be significant. A 2016 poll found 44% of London commuters considered their commute to be the worst part of the lives.⁶⁷ Those keen to shift to working from home, whether full time or more often, have cited such boosts to their quality of life as the greater efficiency of doing so, the time and money saved and the chance to see more of their family.

There are also potential wider benefits created by both a large expansion of working from home and a significant increase in the numbers of Londoners walking and cycling. As well as the improved air quality for London as a whole as a result of fewer motorised vehicles on the road, individuals who spend less time in Central London may find they benefit from avoiding the poorer air quality in the centre of the city. In addition, if an increasing number of people walk or cycle that would be good for those people’s health. It would also lead to the freeing up of space on public transport, thus making traveling on public transport more comfortable.

A further advantage is the flexibility of being able to fit work around other aspects of your life. Clearly this does not apply to all jobs – some of which may require you to be sitting at a desk for set hours every day that you are working – but many home workers find that as long as they complete the right number of hours on a day-by-day basis, they are able to take longer and more productive breaks during the day than they would be

⁶⁶ <https://www.businessleader.co.uk/how-long-is-the-daily-work-commute-for-the-average-londoner/44325/>

⁶⁷ <https://www.standard.co.uk/news/transport/half-of-londoners-say-their-commute-is-the-worst-thing-about-their-lives-a3296461.html>

able to in a Central London office. For example, a parent may fit in school drop-off and collection within their working day and then complete their work whilst their child is doing homework or once he or she is asleep. A further example would be medical issues like a doctor's appointment, which might take just 45 minutes out of a home working day, but which could easily require a full morning off once commuting into the office afterwards is taken into account.

That flexibility may extend further to the types of jobs on offer. Recent years have seen the growth of so-called '9-3 jobs', where working parents wish to work in the hours between school drop-off and school collection. Clearly, by their nature, such jobs are only feasible with home working or with a minimal commute. Not all businesses will want to offer employees the chance to work a 5 or 6 hour day but, as home working and a more flexible workplace is normalised, there is an opportunity for parents who might wish to work, but who would be unwilling or unable to do an office-based job with more traditional hours, to return to the workplace. Home working has the potential to spread opportunity, unlock the workplace and improve the quality of life of a great many Londoners.

Recommendations

1. The Government should commission an independent review into the decisions made by the Mayor and TfL during the Covid-19 pandemic and lockdown.
2. The Mayor and TfL should maximise public transport capacity and safety.
3. The Mayor and TfL should introduce a carnet ticket booklet, and work with the Association of Train Operating Companies to introduce Carnet Travelcards.
4. The Mayor and TfL should reverse the Mayor's expansion of the cost and scope of the Congestion Charge immediately.
5. The Mayor and TfL should cancel the planned October 2021 expansion of the Ultra-Low Emission Zone to the North and South Circulars and immediately cease any and all spending to facilitate the expansion.
6. The Mayor should rule out the introduction of road user charging in London.
7. The Mayor should maximise revenue from TfL's capital assets and scrap the requirement that 50% of new build homes are affordable.
8. The Government should devolve London's share of Vehicle Excise Duty (VED) to London with the proviso that this money is spent on road maintenance.
9. The Mayor should launch a zero-based budgeting review of all TfL spending.
10. The Mayor should scrap nominee passes and lobby the Government to enact legislation that would enable him to stop the gold-plating of TfL pensions.
11. The Mayor and TfL should re-calculate the business cases for all ongoing and potential projects to reflect new working patterns in London.

12. The Mayor and TfL should actively seek to facilitate the rollout or expansion of transport infrastructure and services that it does not and will not provide itself such as e-bikes, e-scooters, dock-less bikes and car clubs.
13. The Mayor and TfL should actively consider which infrastructure might be delivered by the private sector at no direct cost to the taxpayer and funded by tolling.
14. Any Central London road closures should not apply to black cabs, which should be allowed to drive on any road in London where buses can go.
15. The Mayor should work with businesses to coordinate the staggering of employee start-times to enable more commuters to use public transport, whilst socially distancing.
16. The Mayor should recognise the value and importance of motorcycles in terms of their efficient use of road space and minimal contribution to congestion. He should therefore exempt them from the ULEZ and actively find ways to improve access for them.
17. The Mayor should actively support the introduction of driverless trains on the London Underground, as a measure that would reduce the costs and increase Tube capacity.

Conclusion

The desire to return to a pre-lockdown world is entirely understandable. From a political perspective there is nothing a politician likes less than pulling a lever, expecting it to have an effect, and then finding it comes off in their hand. The Mayor of London has declared that “If we all stay at home working it's a big problem”.⁶⁸ Yet our polling suggests that around a quarter of those who have stopped using public transport during lockdown do not intend to start again – and numerous other polls over the last four months indicate that many more people plan to work from home from now on. It is not difficult to see the possible downsides of a large increase in home working, although there are some very big upsides as well – as this report has shown. Ultimately however, whether the Mayor thinks a working from home revolution is positive or negative does not really matter. It is not his job to tell businesses how to best make decisions. Nor is it the Mayor's job to tell his constituents where they ought to work.

All the evidence suggests that after lockdown the numbers of Londoners working from home will be significantly higher than before lockdown. Furthermore, it very much appears that many of those who continue to commute into Central London will seek to minimise their use of public transport. The Mayor should certainly seek to make public transport as safe as possible and he should seek to boost public confidence in using it. Beyond that, however, his role should be to help London and Transport for London to adapt to these new circumstances.

There are plenty of measures the Mayor should seek to implement. There are sensible decisions he could take to help TfL raise more revenue and reduce unnecessary spending. There are many ways in which he could facilitate the private sector in providing more options to help people travel round London. Some of these would require direct U-turns, others might make him uncomfortable, but they are the right thing to do. Equally there are decisions that he might be tempted to make – on top of decisions he has already made – that would be deeply damaging for London and for Londoners. If he stays on the same path then London will indeed find it has a big problem.

⁶⁸ <https://www.dailymail.co.uk/news/article-8623413/Sadiq-Khan-admits-time-staff-working-home-BIG-PROBLEM-Central-London.html>

Appendix 1: YouGov Poll Questions

1) Are you using the following forms of transport more or less than you did before the coronavirus pandemic?

Bicycle (including electric bicycle)

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Walking

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Taxi or minicab

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Train (including London Overground)

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Bus

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Own car or van

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Motorbike or scooter

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

London Underground (including DLR and trams)

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

2) And thinking about the future, when the coronavirus pandemic is over. Do you expect this to be a temporary or permanent change?

Respondents only saw the following options if they said they'd change the amount they were using that mode of transport.

Bicycle (including electric bicycle)

A temporary change
A permanent change
Not sure

Bus

A temporary change
A permanent change
Not sure

Walking

A temporary change
A permanent change
Not sure

Own car or van

A temporary change
A permanent change
Not sure

Taxi or minicab

A temporary change
A permanent change
Not sure

Motorbike or scooter

A temporary change
A permanent change
Not sure

Train (including London Overground)

A temporary change
A permanent change
Not sure

London Underground (including DLR and trams)

A temporary change
A permanent change
Not sure

3) Are you more or less confident using public transport in London at the moment compared to before coronavirus, or is there no difference?

A lot more confident
A little more confident
A little less confident
A lot less confident
No difference - I was confident before and still am

No difference - I wasn't confident before and still am not
Don't know
Not applicable - I'm not currently using public transport

4) How often, if at all, have you used public transport since lockdown was enforced on 23rd March?

5 days or more a week
2 to 4 days a week
Once a week
Less than once a week but more than once per month

Once per month
Less often than once a month
Never

5) How satisfied, if at all, have you been with information provided by the following during the coronavirus outbreak, specifically to do with public transport?

The Mayor of London

Very satisfied
Fairly satisfied
Not very satisfied
Not at all satisfied
Don't know

Transport for London (TfL)

Very satisfied
Fairly satisfied
Not very satisfied
Not at all satisfied
Don't know

"London Polling"

FIELDWORK DATES: 29TH JUNE - 2ND JULY 2020

**Prepared by YouGov plc
On behalf of the Mayor of London**

© YouGov plc 2020

BACKGROUND

This spreadsheet contains survey data collected and analysed by YouGov plc. No information contained within this spreadsheet may be published without the consent of YouGov Plc and the client named on the front cover.

Methodology: This survey has been conducted using an online interview administered members of the YouGov Plc GB panel of 185,000+ individuals who have agreed to take part in surveys. An email was sent to panellists selected at random from the base sample according to the sample definition, inviting them to take part in the survey and providing a link to the survey. (The sample definition could be "GB adult population" or a subset such as "GB adult females"). YouGov Plc normally achieves a response rate of between 35% and 50% to surveys however this does vary dependent upon the subject matter, complexity and length of the questionnaire. The responding sample is weighted to the profile of the sample definition to provide a representative population. The profile is normally derived from census data or if not available from the YouGov plc make every effort to provide representative information. All results are based on a sample and are therefore subject to statistical errors normally associated with sample-based information.

For further information about the results in this spreadsheet, please contact YouGov Plc (+44)(0)20 7 012 6000 or email enquiries@yougov.com quoting the survey details

EDITOR'S NOTES - all press releases should contain the following information

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 1,086 adults. Fieldwork was undertaken between 29th June - 2nd July 2020. The survey was carried out online. The figures have been weighted and are representative of all adults in London (aged 18+)

NOTE: All press releases or other publications must be checked by YouGov Plc before use. YouGov requires 48 hours to check a press release unless otherwise agreed. Please note, multiple press releases will require longer.

- YouGov is registered with the Information Commissioner
- YouGov is a member of the British Polling Council

Any percentages calculated on bases fewer than 50 respondents must not be reported as they do not represent a wide enough cross-section of the target population to be considered statistically reliable. These figures will be italicised.

YouGov / Mayor of London Survey Results

Sample Size: 1086 adults in London
Fieldwork: 29th June - 2nd July 2020

	Gender		Age				Social		London Region (1)				London Region (2)		
	Male	Female	18-24	25-49	50-64	65+	ABC1	C2DE	Central	North	South	East	West	Inner London	Outer London
Total															
1086	534	552	117	577	225	167	641	445	219	128	226	316	193	389	692
1086	453	633	117	541	241	187	735	351	217	138	230	306	192	374	709
%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

Weighted Sample
Unweighted Sample

Are you using the following forms of transport more or less now than you did before the coronavirus pandemic?

Bicycle (including electric bicycle)

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Walking

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Taxi or minicab

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

13	16	11	13	18	11	2	17	8	20	8	8	16	12	23	8
33	33	33	40	36	27	22	35	30	29	33	42	30	29	29	34
5	6	4	3	6	5	1	5	5	5	7	3	6	5	3	6
21	21	21	13	16	23	42	20	24	17	27	22	21	23	17	24
28	24	31	30	24	34	32	24	32	29	25	25	28	31	27	28
51	49	54	59	57	46	35	56	44	59	49	53	48	49	56	49
29	31	27	17	26	37	39	26	34	22	32	34	29	30	23	32
12	11	13	9	11	12	17	12	12	10	14	7	16	12	12	11
2	2	3	1	1	3	7	2	3	3	3	1	2	4	2	3
5	7	4	15	6	2	2	4	7	7	2	5	5	6	6	5
4	4	4	4	5	4	2	5	3	7	4	3	4	4	7	3
21	23	19	23	22	21	15	19	23	18	25	23	22	19	20	22
19	18	19	19	22	15	10	20	16	22	9	18	23	13	25	15
43	41	45	30	40	45	59	45	40	40	50	45	38	47	35	47
13	14	13	24	11	14	14	11	16	13	12	11	14	17	13	14

YouGov / Mayor of London Survey F

Sample Size: 1086 adults in London
Fieldwork: 29th June - 2nd July 2020

	Ethnicity				Work Status						EU Ref 2016		Vote in 2019			
	White	Asian	Black	Mixed / Other	Refused	Full Time	Part Time	Retired	Unemployed	Not Working	Other	Remain	Leave	Cons	Lab	Dem
Total	654	185	136	96	16	477	116	171	77	93	153	489	320	263	395	123
1086	733	171	110	56	16	476	127	193	73	90	127	541	327	275	398	138

Weighted Sample
Unweighted Sample

Are you using the following forms of transport more or less now than you did before the coronavirus pandemic?

Bicycle (including electric bicycle)

- Using this more than before
- Using this the same amount as before
- Using this less than before
- I've stopped using this completely
- Don't know

Walking

- Using this more than before
- Using this the same amount as before
- Using this less than before
- I've stopped using this completely
- Don't know

Taxi or minicab

- Using this more than before
- Using this the same amount as before
- Using this less than before
- I've stopped using this completely
- Don't know

13	13	7	21	19	19	18	12	4	8	14	11	16	8	7	18	9
33	37	28	20	32	28	37	33	23	27	31	33	36	29	33	32	44
5	4	7	9	5	3	6	5	2	5	8	5	5	5	4	4	10
21	20	25	19	25	32	14	25	38	25	21	19	19	24	26	20	19
28	27	33	31	19	19	24	25	33	34	26	33	23	33	30	27	19
51	51	47	46	69	42	57	55	35	53	56	47	52	44	43	56	56
29	32	22	30	21	15	26	37	40	28	23	25	29	32	37	24	33
12	10	19	14	8	26	11	7	18	14	11	12	13	15	12	14	8
2	3	1	2	0	8	1	2	6	2	7	2	2	4	4	1	2
5	4	11	7	1	10	5	0	2	4	3	15	4	4	4	5	1
4	4	3	2	11	0	6	4	1	7	4	1	4	4	5	4	3
21	23	16	16	21	28	22	18	14	22	24	26	22	19	23	19	24
19	16	22	27	19	5	22	22	11	11	20	16	18	18	12	21	17
43	44	46	33	44	48	39	45	59	46	37	37	44	45	48	43	46
13	13	13	21	6	19	11	11	15	14	16	21	12	14	13	13	10

	Gender		Age				Social		London Region (1)				London Region (2)		
	Male	Female	18-24	25-49	50-64	65+	ABC 1	C2DE	Central	North	South	East	West	Inner London	Outer London
Total															
1086	534	552	117	577	225	167	641	445	219	128	226	316	193	389	692
1086	453	633	117	541	241	187	735	351	217	138	230	306	192	374	709

Weighted Sample
Unweighted Sample

Train (including London Overground)

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Bus

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Own car or van

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Motorbike or scooter

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

London Underground (including DLR and trams)

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

And thinking about the future, when the coronavirus pandemic is over... Do you expect this to be a temporary or permanent change?

Respondents only saw the following options if they said above they'd change the amount they were using that mode of transport

Bicycle (including electric bicycle)

2	2	2	1	2	1	2	2	2	3	3	1	1	1	2	1
14	16	13	12	15	16	11	11	20	9	14	19	16	13	11	17
24	27	22	26	28	21	14	27	20	29	15	20	28	23	30	21
52	49	55	39	49	55	67	54	49	49	65	55	48	51	49	54
8	7	9	22	6	6	7	7	9	10	4	5	7	13	8	8
1	1	1	1	2	2	0	1	2	2	1	2	1	2	2	1
16	18	14	12	15	19	17	13	21	10	16	17	21	13	14	17
30	31	30	28	31	33	26	30	30	34	31	26	30	32	36	27
46	43	49	41	47	43	53	51	40	47	51	49	44	44	42	49
6	6	6	18	6	3	4	6	7	7	2	6	6	9	6	6
15	14	15	15	17	15	7	17	11	14	15	13	16	15	14	15
32	34	30	32	35	25	28	31	33	26	31	38	35	26	33	31
18	16	21	7	15	24	30	20	16	10	21	23	15	25	9	24
15	16	14	14	12	17	23	12	19	17	20	13	12	17	15	15
20	20	20	31	21	18	12	20	21	33	14	12	22	17	30	15
1	2	1	0	2	2	0	1	1	2	1	1	1	1	2	1
30	30	30	36	35	25	17	33	26	24	28	36	31	30	30	30
3	3	3	5	4	1	1	3	3	3	4	2	2	4	3	3
27	29	25	25	22	27	44	24	31	27	28	26	28	27	25	28
39	36	41	34	37	46	38	38	39	44	40	35	39	38	40	38
1	1	1	2	1	2	0	1	1	2	1	1	0	1	1	1
13	17	10	14	14	15	9	9	19	9	11	17	16	12	12	14
24	27	21	26	26	23	14	26	20	28	21	17	28	22	28	21
55	49	60	40	54	53	69	58	50	55	61	60	49	53	53	56
7	7	8	19	5	6	8	5	10	7	5	6	7	12	6	8

	Ethnicity					Work Status					EU Ref 2016			Vote in 2019		
	White	Asian	Black	Mixed / Other	Refused	Full Time	Part Time	Retired	Unemployed	Not Working	Other	Remain	Leave	Cons	Lab	Lib Dem
Total	654	185	136	96	16	477	116	171	77	93	153	489	320	263	395	123
1086	733	171	110	56	16	476	127	193	73	90	127	541	327	275	398	138
%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
2	2	1	1	3	0	2	5	0	4	1	0	2	2	2	1	0
14	16	10	12	13	10	14	15	13	21	19	9	12	16	19	13	15
24	22	30	22	32	18	28	19	14	32	23	25	25	19	19	28	23
52	52	48	55	51	62	51	57	65	38	49	47	56	54	52	52	61
8	7	10	11	1	10	6	4	8	5	8	19	5	8	8	7	1
1	2	1	0	2	0	1	2	1	1	5	0	1	2	2	1	0
16	17	13	16	18	0	15	24	15	27	12	12	13	21	21	15	11
30	29	28	34	34	35	34	30	25	38	31	22	31	27	24	35	30
46	46	48	44	45	55	46	45	54	27	47	49	50	46	47	43	57
6	6	9	6	1	10	5	0	5	6	6	16	5	5	6	6	2
15	13	16	22	16	10	19	16	8	13	16	8	16	16	19	15	17
32	36	26	25	28	26	34	34	28	26	29	32	32	35	36	30	32
18	18	21	18	14	33	16	17	29	12	24	15	20	20	23	17	24
15	15	12	10	25	15	12	12	21	26	13	16	14	12	13	16	13
20	18	25	26	17	16	20	21	14	23	19	28	18	18	10	22	15
1	1	0	4	2	0	2	4	0	0	2	0	1	2	1	0	1
30	33	21	24	37	32	35	32	17	24	34	30	33	25	28	31	38
3	2	6	2	1	3	2	2	2	1	7	6	4	2	3	3	2
27	26	30	24	33	14	20	26	40	36	27	30	24	27	30	26	24
39	38	42	46	28	51	42	36	41	39	30	34	38	43	38	40	34
1	1	1	1	2	0	1	1	0	2	1	1	1	1	2	0	0
13	15	10	15	11	0	12	16	11	15	20	13	11	14	17	12	12
24	21	29	30	28	28	27	23	14	30	22	23	24	21	21	25	22
55	57	51	48	58	62	55	57	67	39	50	47	59	57	52	56	66
7	8	10	7	1	10	4	2	8	14	7	17	5	7	7	6	0

Weighted Sample
Unweighted Sample

Train (including London Overground)

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Bus

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Own car or van

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

Motorbike or scooter

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

London Underground (including DLR and trams)

Using this more than before
Using this the same amount as before
Using this less than before
I've stopped using this completely
Don't know

And thinking about the future, when the coronavirus pandemic is over... Do you expect this to be a temporary or permanent change?

Respondents only saw the following options if they said above they'd change the amount they were using that mode of transport

Bicycle (including electric bicycle)

Sample Size: 1086 adults in London
Fieldwork: 29th June - 2nd July 2020

		Gender		Age				Social		London Region (1)				London Region (2)	
Total	Male	Female	18-24	25-49	50-64	65+	ABC1	C2DE	Central	North	South	East	West	Inner London	Outer London
1086	534	552	117	577	225	167	641	445	219	128	226	316	193	389	692
1086	453	633	117	541	241	187	735	351	217	138	230	306	192	374	709
%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

Weighted Sample
Unweighted Sample

[n=421]

A temporary change
A permanent change
Not sure

22	25	18	42	25	21	2	20	25	18	26	15	28	16	20	22
54	51	56	43	53	49	66	56	49	62	44	50	53	57	61	49
25	24	25	15	22	30	31	24	26	20	30	35	19	27	18	29

	Ethnicity				Work Status					EU Ref 2016		Vote in 2019		
	White	Asian	Black	Mixed / Other	Refused	Full Time	Part Time	Retired	Unemployed	Not Working	Other	Remain	Leave	Lib Dem
Total	654	185	136	96	16	477	116	171	77	93	153	489	320	123
Weighted Sample	733	171	110	56	16	476	127	193	73	90	127	541	327	138
Unweighted Sample	%	%	%	%	%	%	%	%	%	%	%	%	%	%

[n=421]

A temporary change
A permanent change
Not sure

	Gender		Age				Social		London Region (1)				London Region (2)			
	Total	Male	Female	18-24	25-49	50-64	65+	ABC1	C2DE	Central	North	South	East	West	Inner London	Outer London
				%	%	%	%	%	%	%	%	%	%	%	%	%
Walking [n=724]																
Weighted Sample	1086	534	552	117	577	225	167	641	445	219	128	226	316	193	389	692
	1086	453	633	117	541	241	187	735	351	217	138	230	306	192	374	709
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Unweighted Sample																
Taxi or minicab [n=730]																
A temporary change	38	44	32	46	35	39	43	34	44	29	40	38	47	31	37	38
	50	43	55	40	52	52	45	51	46	54	49	48	43	57	51	48
	13	13	13	15	14	9	12	15	9	17	11	14	10	13	12	13
A permanent change																
Not sure																
Train (including London Overground) [n=861]																
A temporary change	49	47	50	52	54	44	37	52	44	49	56	50	45	50	48	50
	25	27	24	22	22	27	35	22	31	27	23	21	29	24	30	23
	26	25	26	26	24	29	27	26	25	24	22	29	26	26	23	28
A permanent change																
Not sure																
Bus [n=858]																
A temporary change	62	64	60	71	63	59	59	67	54	63	58	66	61	60	62	62
	20	19	20	17	19	19	24	15	27	20	18	15	21	21	22	18
	19	17	20	12	19	22	17	18	19	17	24	19	18	18	16	20
A permanent change																
Not sure																
Own car or van [n=541]																
A temporary change	61	62	60	68	60	61	59	63	56	61	58	66	59	58	61	61
	21	23	19	17	23	19	19	19	25	22	24	18	21	24	23	20
	18	15	21	15	17	20	21	18	18	18	18	17	20	19	17	19
A permanent change																
Not sure																
Motorbike or scooter [n=318]																
A temporary change	43	46	41	45	41	41	49	46	39	36	41	54	42	40	35	46
	33	32	34	34	37	30	28	32	35	40	42	20	29	42	41	31
	23	22	25	21	21	29	23	22	26	24	17	26	29	19	25	23
A permanent change																
Not sure																
A temporary change	11	12	9	12	16	7	1	13	8	12	20	14	7	3	9	11
	59	58	61	47	52	64	77	59	60	58	52	56	60	71	60	59
	30	29	31	41	31	29	23	28	32	30	29	31	33	26	31	30
A permanent change																
Not sure																
London Underground (including DLR and trams) [n=887]																
A temporary change	58	59	57	77	57	55	56	63	50	56	65	61	56	58	56	60
	22	21	22	10	22	25	22	18	27	29	18	19	19	21	27	18
	20	19	21	13	21	20	22	19	23	15	17	19	26	21	18	22
A permanent change																
Not sure																

	Total	Ethnicity					Work Status					EU Ref 2016			Vote in 2019		
		White	Asian	Black	Mixed / Other	Refused	Full Time	Part Time	Retired	Unemployed	Not Working	Other	Remain	Leave	Cons	Lab	Lib Dem
		%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
	1086	654	185	136	96	16	477	116	171	77	93	153	489	320	263	395	123
	1086	733	171	110	56	16	476	127	193	73	90	127	541	327	275	398	138
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Weighted Sample																	
Unweighted Sample																	
Walking																	
<i>[n=724]</i>																	
A temporary change	38	35	45	40	33	74	34	37	41	43	40	43	36	37	44	35	36
A permanent change	50	52	39	44	62	17	52	49	48	48	46	47	49	54	47	50	56
Not sure	13	13	16	16	5	9	14	14	12	9	14	10	15	10	9	15	8
Taxi or minicab																	
<i>[n=730]</i>																	
A temporary change	49	48	54	45	53	35	54	47	37	55	47	47	53	44	43	52	62
A permanent change	25	28	24	24	13	39	21	21	36	20	29	31	23	30	31	23	13
Not sure	26	24	22	31	34	26	25	33	27	24	24	22	24	26	26	24	26
Train (including London Underground)																	
<i>[n=861]</i>																	
A temporary change	62	61	62	57	75	36	65	63	60	65	54	56	64	58	62	64	77
A permanent change	20	20	24	21	9	26	16	16	23	20	28	24	16	25	17	21	12
Not sure	19	19	14	22	16	39	19	21	17	15	18	20	20	17	21	15	11
Bus																	
<i>[n=858]</i>																	
A temporary change	61	61	66	54	60	36	63	63	58	64	62	54	65	58	57	64	76
A permanent change	21	20	22	23	25	40	19	19	21	25	22	27	18	22	22	22	12
Not sure	18	19	12	23	15	24	18	18	21	11	16	19	17	20	21	14	12
Own car or van																	
<i>[n=541]</i>																	
A temporary change	43	43	49	37	41	51	42	47	48	35	36	46	44	43	49	38	50
A permanent change	33	35	25	40	28	36	31	37	28	44	50	29	32	38	30	40	23
Not sure	23	22	26	23	31	13	27	16	24	20	14	25	24	19	20	22	28
Motorbike or scooter																	
<i>[n=318]</i>																	
A temporary change	11	8	17	7	17	0	12	20	2	3	21	11	13	6	10	11	17
A permanent change	59	63	61	60	35	84	56	57	74	68	53	47	58	71	69	59	58
Not sure	30	29	22	33	48	16	32	22	24	29	26	41	29	23	22	30	25
London Underground (including DLR and trams)																	
<i>[n=887]</i>																	
A temporary change	58	58	65	51	60	33	61	65	55	55	52	53	60	54	55	60	75
A permanent change	22	22	22	18	21	43	19	15	22	17	31	30	20	24	22	22	12
Not sure	20	20	13	31	19	24	20	20	23	27	17	18	20	21	23	18	14

	Gender		Age				Social		London Region (1)				London Region (2)		
	Male	Female	18-24	25-49	50-64	65+	ABC1	C2DE1	Central	North	South	East	West	Inner London	Outer London
Total															
1086	534	552	117	577	225	167	641	445	219	128	226	316	193	389	692
1086	453	633	117	541	241	187	735	351	217	138	230	306	192	374	709
%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

Are you more or less confident using public transport in London at the moment compared to before coronavirus, or is there no difference?

1	2	1	0	2	2	0	1	1	3	4	0	1	0	2	1
4	4	4	5	4	4	3	4	3	3	3	3	6	4	4	4
5	6	5	5	6	5	3	6	4	6	8	3	6	4	6	5
TOTAL MORE CONFIDENT	20	21	19	28	21	17	22	17	22	22	25	19	12	23	18
A little less confident	34	30	38	26	36	32	39	28	33	42	35	32	35	32	36
A lot less confident	54	51	58	54	57	54	61	45	55	63	60	51	47	55	54
TOTAL LESS CONFIDENT	13	15	11	10	13	12	16	11	10	12	12	12	17	11	14
No difference – I was confident before and still am	7	7	8	5	7	10	5	4	8	3	6	9	9	7	7
No difference – I wasn't confident before and still am not	3	4	3	10	4	1	0	3	3	2	2	4	5	3	3
Don't know															
Not applicable – I'm not currently using public transport	17	17	17	16	14	17	29	15	18	12	16	18	19	18	16

How often, if at all, have you used public transport since lockdown was enforced on 23rd March?

4	5	3	4	4	5	2	3	5	3	6	6	3	2	3	4
7	7	6	5	7	7	5	6	7	9	4	5	7	6	9	5
5	6	5	3	6	4	7	6	5	8	5	3	6	5	7	4
11	11	12	14	12	11	8	11	12	13	7	9	12	11	14	9
5	6	4	6	5	6	3	4	7	4	6	4	7	3	6	5
17	18	15	24	17	15	12	16	17	15	21	13	17	19	18	16
51	47	55	43	50	51	62	55	47	46	50	61	48	53	43	56

How satisfied, if at all, have you been with information provided by the following during the coronavirus outbreak, specifically to do with public transport?

11	11	11	5	12	13	9	13	7	12	8	10	13	10	14	9
35	33	36	37	36	31	34	37	31	35	43	38	29	36	36	35
46	45	47	43	48	44	42	51	39	47	51	48	42	45	49	44
TOTAL SATISFIED	20	21	18	20	21	17	18	20	15	22	19	24	16	16	21
Not very satisfied															

	Ethnicity				Work Status					EU Ref 2016		Vote in 2019	
	White	Asian	Black	Mixed / Other	Refused	Full Time	Part Time	Retired	Unemployed	Not Working	Other	Remain	Leave
Total	654	185	136	96	16	477	116	171	77	93	153	489	320
1086	733	171	110	56	16	476	127	193	73	90	127	541	327
Weighted Sample	%	%	%	%	%	%	%	%	%	%	%	%	%
Unweighted Sample	%	%	%	%	%	%	%	%	%	%	%	%	%

Are you more or less confident using public transport in London at the moment compared to before coronavirus, or is there no difference?

1	1	2	1	3	0	2	3	0	1	0	0	1	1	2	1	0
4	3	6	4	5	0	4	4	3	7	4	3	4	4	7	3	1
5	4	8	5	8	0	6	7	3	8	4	3	5	6	9	3	1
TOTAL MORE CONFIDENT	20	19	18	21	28	22	24	15	20	12	21	23	15	17	25	20
A little less confident	34	35	30	37	34	39	33	33	28	38	23	41	32	30	39	41
A lot less confident	54	54	47	59	63	55	57	48	48	50	44	64	47	47	63	61
TOTAL LESS CONFIDENT	13	14	11	9	13	3	11	13	14	20	10	9	16	14	11	15
No difference – I was confident before and still am	7	8	8	2	5	6	10	6	10	6	9	4	10	9	6	3
No difference – I wasn't confident before and still am not	3	2	6	8	1	10	3	0	2	4	8	2	2	2	4	3
Don't know																
Not applicable – I'm not currently using public transport	17	18	19	12	13	28	12	11	14	17	25	16	20	18	13	19

How often, if at all, have you used public transport since lockdown was enforced on 23rd March?

4	3	3	5	6	10	6	8	1	0	0	1	4	3	4	3	3
7	6	4	10	9	3	6	13	5	9	7	4	6	5	7	6	8
5	6	5	5	6	10	4	9	5	13	6	4	5	6	8	5	5
Once a week																
11	11	11	11	16	3	12	14	6	16	12	12	11	8	6	13	12
Less than once a week but more than once per month																
5	5	5	7	5	0	4	2	3	7	8	9	5	5	4	6	5
Once a month																
17	14	18	25	12	37	17	11	15	22	14	19	15	15	15	20	10
Less often than once a month																
51	55	54	36	46	37	50	43	65	33	53	53	55	58	56	47	57
Never																

How satisfied, if at all, have you been with information provided by the following during the coronavirus outbreak, specifically to do with public transport?

11	9	14	14	15	0	14	12	8	7	5	8	18	3	2	17	17
Very satisfied																
35	36	33	39	28	5	39	24	34	29	38	32	44	26	27	43	46
Fairly satisfied																
46	45	47	53	43	5	54	36	42	36	43	40	62	29	29	60	63
TOTAL SATISFIED																
20	19	19	20	24	31	16	27	19	28	25	19	15	25	27	17	12
Not very satisfied																

		Gender		Age				Social		London Region (1)				London Region (2)		
Total	Male	Female	18-24	25-49	50-64	65+	ABC1	C2DE	Central	North	South	East	West	Inner London	Outer London	
1086	534	552	117	577	225	167	641	445	219	128	226	316	193	389	692	
1086	453	633	117	541	241	187	735	351	217	138	230	306	192	374	709	
Weighted Sample		%	%	%	%	%	%	%	%	%	%	%	%	%	%	
Unweighted Sample		18	20	17	6	16	26	13	25	14	19	15	20	24	14	20
Not at all satisfied		38	41	35	27	36	43	45	34	44	29	42	33	44	40	31
TOTAL NOT SATISFIED		16	14	18	31	16	12	13	15	18	24	7	19	14	15	20
Don't know																14

	Ethnicity					Work Status						EU Ref 2016		Vote in 2019			
	Total	White	Asian	Black	Mixed / Other	Refused	Full Time	Part Time	Retired	Unemployed	Not Working	Other	Remain	Leave	Cons	Lab	Lib Dem
Weighted Sample	1086	654	185	136	96	16	477	116	171	77	93	153	489	320	263	395	123
	1086	733	171	110	56	16	476	127	193	73	90	127	541	327	275	398	138
Unweighted Sample	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Not at all satisfied	18	19	19	13	15	44	16	19	24	24	15	17	9	36	37	9	8
	38	38	38	33	39	75	32	45	43	52	40	36	23	62	64	27	20
TOTAL NOT SATISFIED																	
Don't know	16	17	15	15	18	19	14	18	15	13	17	24	14	10	7	13	17

		Gender		Age					Social		London Region (1)					London Region (2)		
		Male	Female	18-24	25-49	50-64	65+	ABC1	C2DE	Central	North	South	East	West	Inner London	Outer London		
Total		534	552	117	577	225	167	641	445	219	128	226	316	193	389	692		
		453	633	117	541	241	187	735	351	217	138	230	306	192	374	709		
Weighted Sample		1086																
Unweighted Sample		1086																
		%	%	%	%	%	%	%	%	%	%	%	%	%	%	%		
Transport for London (TfL)																		
Very satisfied		15	15	14	7	15	21	12	16	13	15	15	12	19	11	16		
Fairly satisfied		45	47	43	48	46	43	43	46	43	43	51	47	41	48	47		
TOTAL SATISFIED		60	62	57	54	61	63	55	62	56	58	65	59	60	59	60		
Not very satisfied		14	16	13	12	14	14	16	14	14	13	14	15	15	13	14		
Not at all satisfied		10	8	11	5	10	10	13	8	12	9	12	8	8	13	10		
TOTAL NOT SATISFIED		24	24	24	17	24	24	29	22	26	22	26	24	23	27	25		
Don't know		16	14	19	29	16	13	16	15	18	20	9	17	17	14	15		

	Ethnicity					Work Status						EU Ref 2016		Vote in 2019		
	White	Asian	Black	Mixed / Other	Refused	Full Time	Part Time	Retired	Unemployed	Not Working	Other	Remain	Leave	Cons	Lab	Lib Dem
Total	654	185	136	96	16	477	116	171	77	93	153	489	320	263	395	123
Weighted Sample	733	171	110	56	16	476	127	193	73	90	127	541	327	275	398	138
Unweighted Sample	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Transport for London (TfL)																
Very satisfied	15	15	14	13	17	3	17	15	14	14	7	14	16	13	14	18
Fairly satisfied	45	46	46	45	46	5	46	40	42	47	52	44	52	36	39	52
TOTAL SATISFIED	60	61	58	63	8	63	55	56	61	60	58	69	49	53	69	71
Not very satisfied	14	13	17	12	36	13	16	17	10	17	13	11	18	20	10	9
Not at all satisfied	10	9	9	13	9	24	10	11	12	10	7	6	8	16	8	2
TOTAL NOT SATISFIED	24	22	26	25	21	59	24	27	29	20	25	18	19	34	37	18
Don't know	16	17	13	17	16	33	14	19	16	19	16	24	13	17	11	13

