Public Board meeting

13.11.24

LONDON TRAVELWATCH

Transport in London monitor

Agenda item: LTW765
Drafted: 4 Nov 2024

Author: Michael Roberts, Chief Executive

This paper draws on a number of external sources to give a glimpse of what is being experienced by the travelling public, as a complement to the updates from our Casework, Campaigns and Communications leads.

Selected highlights from the Commissioner's report to TfL Board meeting held on 16th October can be found on pages 2-4: his report is part of the full TfL Board pack here: https://tfl.gov.uk/cdn/static/cms/documents/board-20241016-agenda-and-papers.pdf). The focus of the report is on milestones reached, projects/intiatives completed and decisions reached across a wide range of TfL activites.

On pages 5-10, extracts are reproduced from TfL's operational/customer service data Q1 2024/25, taken from its latest quarterly Customer Service and Operational Performance (CSOP) report Customer, Sustainability and Operations Panel Agenda and Papers 2 October 2024 and discussed at the October CSOP Panel meeting. The extracts provide data on:

- Passenger journey numbers and journey times on selected TfL modes;
- Survey scores on the percentages of Londoners and disabled Londoners agreeing with the statement "TfL cares about its customers";
- Customer satisfaction scores with six TfL modes;
- Call volumes to TfL's contact centre and rate of complaints, disaggregated by TfL service areas.

Page 10 features a table summarising passenger satisfaction levels for train operators (the same table as that included in the September version of the monitor), from the latest compilation of Transport Focus' regular Rail User Surveys, published in July https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2024/07/25094139/Rail-User-Survey-%E2%80%93-train-operator-results-%E2%80%93-July-2024.pdf.

The final section, on pages 11-13, provides a selection of some of the more prominent transport stories relevant to London which have featured in the media and on social media since Board members last met in September.

Selected highlights from the Transport Commissioner's report (October 2024)

Safety & security

TfL was subjected to a cyber attack 1st September. 5,000 customers affected, TfL subsequently limited access to systems: it is currently not possible to apply for or renew Oyster photocards.

Six fatal incidents on the TfL network: 2 from passengers being struck by a bus, 1 bus driver attacked, 3 customers at Tube stations.

Continuing work with Mayor's Office for Policing and Crime to carry out localised women's safety audits: 70 completed in Hillingdon, Lambeth, Westminster, Waltham Forest and Brent.

As part of Phase 2 of the Lowering Speeds Programme, a new 40mph speed limit was introduced in July on the A406 North Circular Road.

During September and October, detailed design work continued on planned Road Safety schemes at locations in Kensington & Chelsea, Camden, Lambeth and Lewisham.

Safer Junctions programme: public consultation finished on safety improvements at Hogarth Roundabout in Hounslow. Planning continues on remaining junctions in the programme: TfL plan to complete public engagement on 10 of these by end 2024.

From end October, HGVs over 12 tonnes will need to hold at least a three-star Direct Vision Standard rating or fit the Progressive Safe System (PSS) to operate in Greater London.

A meeting of the Vision Zero Reference Group was held in August with road danger reduction stakeholders, including an update on the Victim Support Partnership Pilot.

Our customers

In September, the TfL bus team met Kensington and Chelsea, and Barnet, as part of its engagement with London boroughs: 23 boroughs have been met to discuss collaboration on the Bus Action plan.

New bus lane schemes have been completed in Ealing and Enfield en route to the 25km of new bus lanes by 2025 goal. Public consultations on TfL Road Network bus lane schemes have been completed in Lewisham and Sutton.

More than 150 reviews of bus timetables have now been carried out to deliver more than 2,400 bus passenger hours of time savings each day.

July saw the first anniversary of the launch of the first Superloop route (SL8). This route (Uxbridge-White City) has the highest average weekday demand of all Superloop services. The average increase in passengers on all Superloop corridors since June 2023 is 11%, 9% higher than the network average.

Work to refurbish the A40 Westway started as planned in July.

Work progressing on the East London Line includes a new station entrance and step free access at Surrey Quays London Overground station and upgrading parts of the line to increase capacity (fully funded by third parties). £25m was secured in August for the proposed new Surrey Canal station and work continues to find the necessary additional funding.

Four suppliers have been shortlisted to supply a replacement new fleet for London Trams, expected to be in operation by end of this decade.

A new eight-year contract to operate the DLR was awarded to the incumbent (KeolisAmey).

1,000 extra Santander e-bikes were introduced over the summer, with plans for more to bring total to 2,000 by end of the year.

An invitation of private sector expressions of interest to invest in London River Service piers was concluded (11 responses received).

TfL's e-scooter trial with 10 boroughs (4,000 e-scooters) was extended in July to Southall. A total of 4.64 million trips have now been made (up to 22nd September).

TfL worked with policing partners to ensure transport networks stayed safe during riots at end of July, and also increased visibility of its hate crime campaign.

Major events in London included Taylor Swift concerts and the IBF World Title fight at Wembley, cricket at The Oval and Lord's, and the return of the Premier and Football leagues.

During the Notting Hill Carnival, attendees for the first time were encouraged to travel to the event using the Elizabeth Line from Paddington station. TfL also collaborated for the first time with Goole Maps to promote specific travel advice to those planning journeys in the area of the carnival.

Preparations for the Piccadilly line upgrade continue with completion of the first of the initial maintenance facilities at Northfields and major track replacement works in the Arnos Grove area.

Work continues inside the Silvertown tunnels and on the supporting highway works. Public consultation on the proposed user charge levels concluded in September: the responses are being assessed ahead of TfL Board decisions by the end of the year.

Technical issues have led to speed restrictions on some sections of the DLR and will mean some delay to roll-out of new trains, which will now not start this year.

Work was completed over the summer on the temporary section of Cycleway 50 and Cycleway 9, with consultations for walking and cycling improvements at other locations.

4G/5G coverage is now available in 36% of Tube stations and 26% of underground tunnel sections.

In August, the next group of Tube stations to be prioritised for step-free access were announced, with work starting on 3 and feasibility at another 7 being evaluated. The

opening of the new ticket hall at Paddington Tube station in September provides step-free access to the Bakerloo line platform for the first time.

The new bus route 310 trial started in August to serve the local Jewish community in Golders Green and Stamford Hill.

Our green future

The ULEZ six-month report (July) showed vehicle compliance rate up to 96.2%. Emissions of NO2 & PM2.5 in outer London were estimated to be 21% and 20% lower than they would have been in a scenario without the London-wide ULEZ.

The ULEZ scrappage scheme closed in September: more than £188m was committed to around 54,000 applicants.

At end July, London has over 21,000 public electric vehicle charge points, including 1,200 rapid/ultra-rapid points: so far TfL has delivered more than 300 of these rapid charge points.

Our finances

Cumulative journey growth is just over 2% compared with last year and 6% growth targeted for the full year. Journeys are 52 million lower than Budget and passenger income £78 million lower than budget – this could increase to around £150m by year-end.

Operating costs are 1% lower than Budget and TfL is implementing plans to deliver more savings in-year, with a forecast year-end operating surplus of £61m (£100m lower than budget).

Capital renewals are £324 million year to date, £79 million up on last year, as TfL seeks to address their backlog of asset replacement.

TfL completed construction of its 1,000th home en route to its 2031 target to start building 20,000 homes. Planning applications for more than 7,000 homes at Earls Court and Edgware were submitted in July.

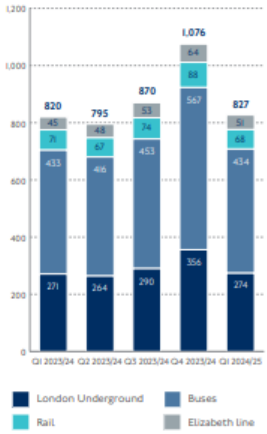
Selected TfL operational/customer service data Q4 2023/24 (June 2024)

Passenger journeys

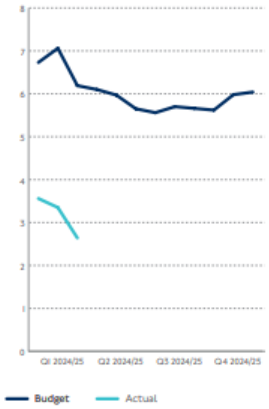
Passenger journeys across the network continue to grow, with 827 million journeys this quarter, compared with 820 million journeys in the same quarter last year. Despite this year-on-year growth, the number of journeys is 29 million below Budget.

The reduction in demand compared with Budget is across most of the network except for Trams and the Elizabeth line, which continues to see increases two years after the start of through running of operation.

Passenger journeys*
Past five quarters (millions)



Cumulative year-on-year growth (%)



Passenger journeys at the end of the quarter totalled 827 million, 29 million below Budget. However, compared to the same quarter last year, journeys have increased by seven million, showing a continuous rise in activity across most areas of the network.

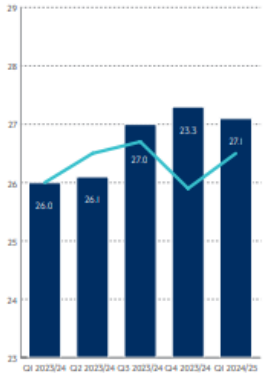
* Quarter 4 is longer than Quarters 1-3 (15 weeks and six days vs 12 weeks)

London Underground journey time

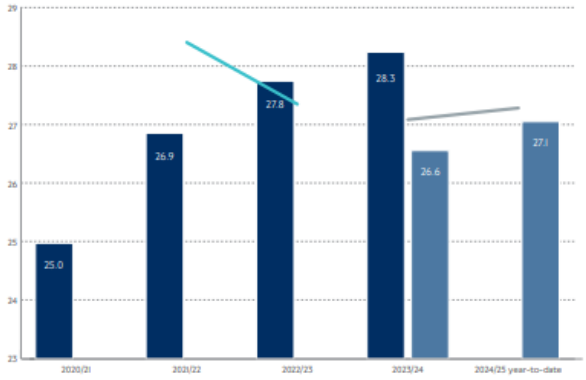
This is a demand-weighted average of all Tube customer journey times and is comprised of wait time and in-vehicle time. Actual (clock) times are weighted by customers' perceived values for waiting on platforms, platform crowding, on-train crowding, being unable to board (left behind), and on-train delays. It measures the journey times that customers actually experience when they use the Tube.

The adjusted figures for 2023/24 onwards reflect the fact that London Underground customers are making shorter journeys because some relatively long journeys have moved to the Elizabeth line.

London Underground journey time
Past five quarters (minutes)



Annual trend (moving average)



The average Tube customer journey time for Quarter 1 2024/25 was 0.7 minutes worse than the target. The main causes remained fleet issues on the Central line; and train operator availability issues across the network.

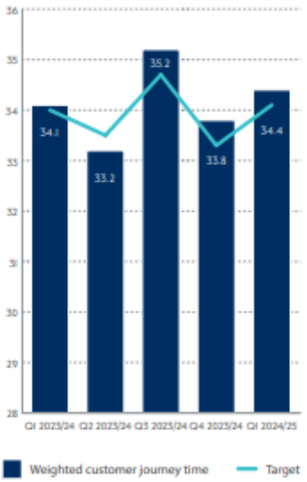
The increase in journey times over the past five years reflects the post-pandemic growth in the number of customers travelling on our network since 2020/21. As journey numbers return to pre-pandemic levels, there has been an expected increase in crowding in trains, dwell times at stations and customer-related incidents. The initially rapid post-pandemic recovery has slowed down, and year-on-year growth in journeys has been relatively modest (less than 10 per cent) since the second half of 2023/24.

A significant contributor to the rise in journey times since the second half of 2023/24 has been the consistently high number of service cancellations due to reduced availability of trains on the Central line, and to a lesser extent on the Jubilee and Northern lines. While the Jubilee and Northern line fleets have recovered considerably, we expect the Central line fleet issues (availability and reliability) to the recovery of the fleet will take longer.

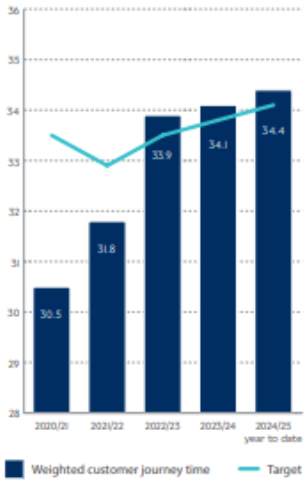
Bus journey time

We measure the average time our passengers spent on their bus journey, which is an accumulation of all stages of a customer's journey, in minutes. It enables us to monitor the performance of our bus service from the perspective of our customers. Quicker and more reliable journeys are likely to make public transport more competitive with private transport.

Bus journey time
Past five quarters (minutes)



Annual trend (moving average)



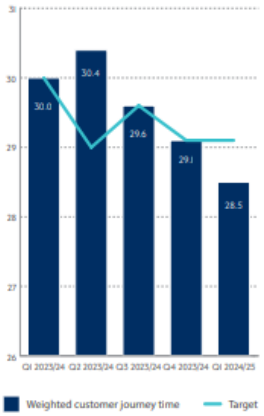
Bus journey times were worse than target in four of the last five quarters. The key drivers were lower bus speeds and lower reliability levels than forecast, both of which were adversely impacted by ongoing mechanical issues and congestion. This resulted in longer bus journey times for our customers.

We missed the target for 2022/23, 2023/24 and 2024/25 to date, meaning our customers experienced slightly longer journey times. This was mainly due to staff shortages in 2022/23 and due to traffic and mechanical factors in 2023/24 and 2024/25 to date. We are focused on measures to improve bus speeds and journey times, such as the creation of new bus priority lanes.

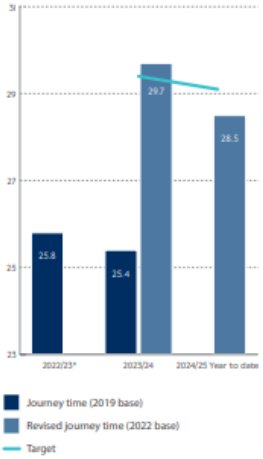
Rail journey time

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

Elizabeth line journey time
Past four quarters (minutes) since through running commenced



Annual trend (moving average) since through running commenced



Elizabeth line customer journey time was better than target this quarter and presents the lowest customer journey time experienced in the last five quarters. There have been a high number of Network Rail-related incidents such as points failures and track defects, particularly on the western section of the railway. Incidents were managed well, reducing the impact on journey times.

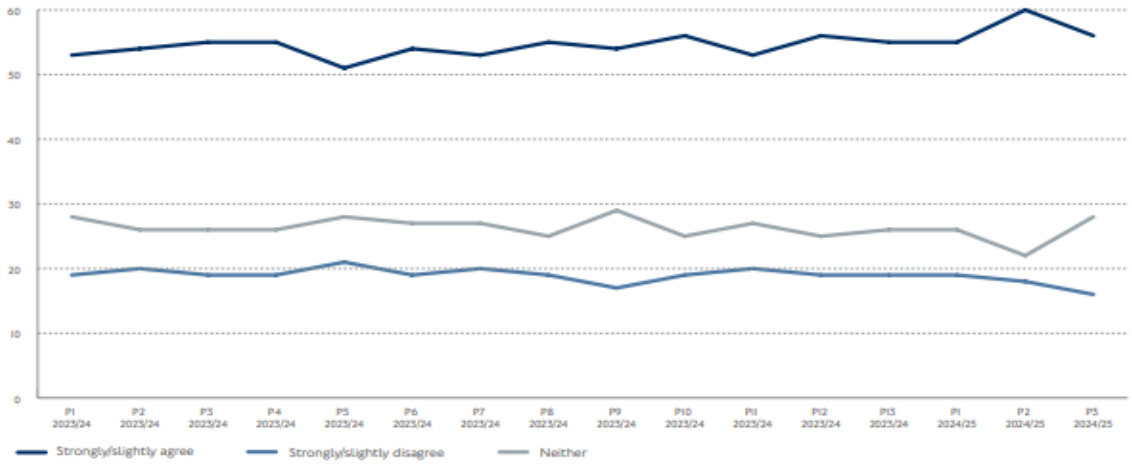
The year-to-date customer journey time is better than the annual target. Following the introduction of a new timetable last year, performance has stabilised and journey times have improved through more reliable and more frequent services. This has benefitted scheduled journey times, while excess journey times (the difference between scheduled and actual journey time) have also been improved through better management of incidents to limit their impact.

The adjusted figures for 2023/24 onwards reflect the fact that Elizabeth line customers are now making longer journeys, using the service to travel both within and outside London.

* data only available from Period 10 2022/23

TfL cares about its customers

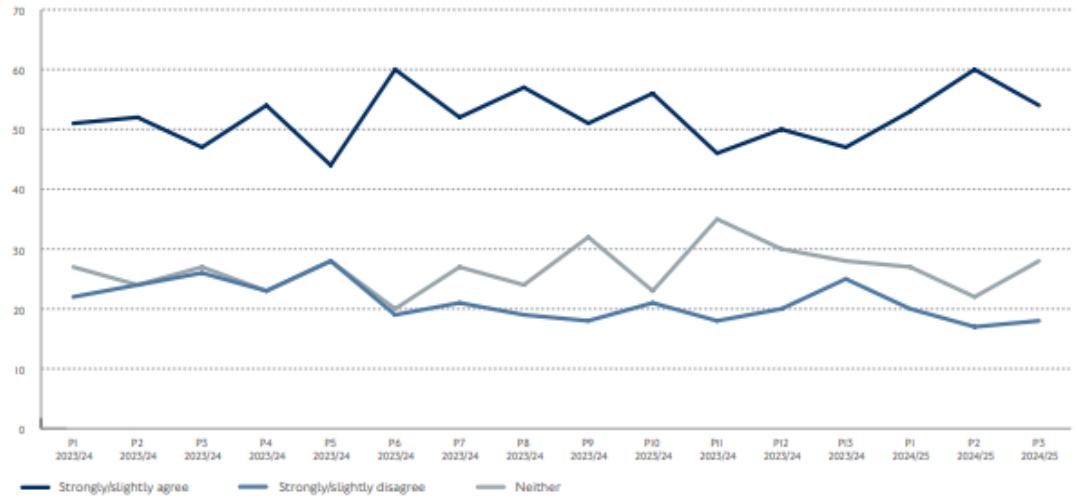
All Londoners
Agreement, disagreement, neither (%)



The percentage of Londoners agreeing with the statement 'TfL cares about its customers' is 57 per cent in Quarter 1 2024/25. This is an increase of two points from Quarter 4 2023/24 and one point above the annual target of 56 per cent.

The percentage of public transport users (those who have used public transport in the last seven days) agreeing with the statement 'TfL cares about its customers' is 59 per cent for this quarter, an increase of two points from the previous quarter.

Disabled Londoners
Agreement, disagreement, neither (%)



The percentage of disabled Londoners agreeing 'TfL cares about its customers' is 56 per cent for Quarter 1 2024/25, an increase of six points from Quarter 4 2023/24. Confidence to travel among disabled Londoners is lower than that of non-disabled Londoners, and this quarter that gap widened very slightly.

Satisfaction

Customer satisfaction score
Past five quarters

	Q1 2023/24	Q2 2023/24	Q3 2023/24	Q4 2023/24	Q4 2024/25
London Underground	76	75	74	75	75
London Buses	77	77	76	77	78
DLR	79	78	78	78	79
London Overground	77	77	76	78	77
London Trams*	N/A	N/A	78	N/A	N/A
Elizabeth line	83	82	81	81	81

Overall satisfaction for individual modes was broadly stable this quarter with no significant changes.

Satisfaction with levels of crowding on the platform increased significantly to 72 for London Underground, the highest score since Quarter 1 2021/22.

For buses, satisfaction with on-bus information increased significantly to 76.

Elizabeth line saw a significant decrease in satisfaction with cleanliness at stations falling to 77, the lowest score in over a year.

In Quarter 4 2023/24, there were significant improvements in satisfaction with a range of on-mode metrics, and these improvements have been maintained this quarter.

This quarter we have added a new measure to the customer satisfaction score: satisfaction with all public transport journeys in the last week (PT CSS). We have introduced this because it delivers a broad measure of customer experience, which encompasses multiple journeys, interchanges and multimodal journeys. The PT CSS score for this quarter is 76.

* London Trams is not surveyed on customer satisfaction score continually but once a year in Quarter 3, so N/A is shown for all other quarters

Calls

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

General contact centre calls
Past five quarters

	Q1 2023/24	Q2 2023/24	Q3 2023/24	Q4 2023/24	Q1 2024/25
Telephone calls	558,960	578,555	658,480	698,053	500,213
Calls abandoned (%)*	9.65	9.78	11.41	10.62	11.32
Correspondence	232,869	245,621	270,987	296,111	221,392
Cases closed (%)**	86.25	82.21	80.27	77.11	85.95
Average speed of answer (seconds)	656	663	625	394	290
Total demand	791,829	824,176	929,467	994,164	721,605
Telephone calls (% of total demand)	71	70	71	70	69
Correspondence (% of total demand)	29	30	29	30	31

Past five years

	2020/21	2021/22	2022/23	2023/24	2024/25 year-to-date
Telephone calls	1,304,300	2,292,137	2,426,382	2,496,839	500,213
Calls abandoned (%)*	7.6	16.12	12.22	10.41	11.32
Correspondence	364,778	580,567	900,797	1,045,652	221,392
Cases closed (%)**	83.4	73.80	82.76	81.2	85.95
Total demand	1,669,078	2,872,704	3,327,179	3,542,491	721,605
Telephone calls (% of total demand)	78	80	73	70	69
Correspondence (% of total demand)	22	20	27	30	31

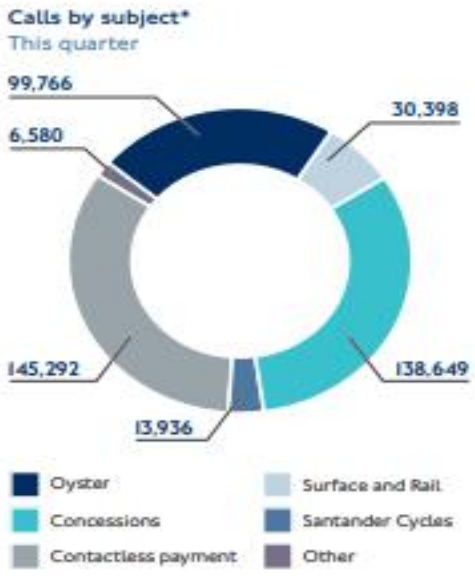
Call volumes fell this quarter, down 28 per cent on last Quarter and 11 per cent lower than the same quarter last year. Maintenance outages will have been a contributing factor.

Correspondence also followed this trend, down 25 per cent on last Quarter and five per cent on last year. The lower volumes helped us improve our cases closed metric, with 11 per cent more cases closed than the previous quarter. Positively, we also saw the average speed of answer reduce, down 26 per cent on last quarter and 56 per cent on last year.

Despite the shifts in demand volumes, the split between telephone calls and correspondence remains fairly stable, with a slight shift towards correspondence, compared to Quarter 4. In this Quarter 69 per cent of demand arrived via telephone calls and the remaining 31 per cent via correspondence.

* Target of 15 per cent or lower

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



With volumes overall down roughly 28 per cent on last quarter, it's not surprising to see falls across all the areas highlighted here. The exception to this trend is Santander Cycles which saw the number of calls increase 26 per cent compared to last quarter. The biggest reason behind this is simply that the weather makes cycling a more appealing option for customers.

Calls relating to both concessions and contactless fell more than the average, 33 per cent and 29 per cent respectively. With concessions, this is due to seasonal trends, as the number of calls tends to spike around the start of the academic year. In the case of contactless, the fall comes against a five per cent rise in usage. This will be partly down to Quarter 4 being longer than Quarter 1. In both cases the fall compared to the same quarter last year is less significant.

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

Complaints

Complaints
Year on year (per 100,000 journeys)

	Q1 2023/24	Q1 2024/25	Variance (%)
London Underground	0.91	0.92	1
London Buses	3.46	3.72	8
DLR	0.43	0.57	33
London Overground	0.38	0.58	53
Elizabeth line	0.9	0.65	-28
London Trams	0.88	1.27	44
IFS Cloud Cable Car	3.24	2.9	-10
Congestion charge	1.71	1.25	-27
Dial-a-Ride*	34.46	54.09	57
London River Services	0.12	0.52	333
Santander Cycles	2.58	4.42	71
Taxis**	4.82	4.31	-11
Private hire**	3.42	3.3	-4
Contactless	0.52	0.53	2
Oyster	0.44	0.37	-16

Past five years

	2020/21	2021/22	2022/23	2023/24	2024/25 year-to-date
London Underground	1.74	1.26	0.96	1.1	0.92
London Buses	4.37	3.29	3.42	3.69	3.72
DLR	1.09	0.54	0.65	0.48	0.57
London Overground	1.24	0.65	0.48	0.45	0.58
Elizabeth line	2.26	1.77	0.79	0.75	0.65
London Trams	1.76	0.85	0.81	0.76	1.27
IFS Cloud Cable Car	2.57	4.69	3.75	1.99	2.9
Congestion charge	3.83	3.55	2.24	2.57	1.25
Dial-a-Ride*	64.87	61.33	66.99	115.67	54.09
London River Services	2.44	0.47	0.25	0.32	0.52
Santander Cycles	2.68	2.24	3.29	2.99	4.42
Taxis**	1.69	3.24	4.68	4.88	4.31
Private hire**	1.36	2.3	2.95	2.99	3.3
Contactless	0.39	0.5	0.51	0.51	0.53
Oyster	0.26	0.48	0.49	0.49	0.37

The rail modes mainly saw increases in complaints this quarter, with the exception being the Elizabeth line which saw a 28 per cent drop in complaints despite a 14 per cent increase in journeys. London Underground complaints rose one per cent against a two per cent increase in usage, while London Overground saw a rise of 53 per cent driven largely by complaints around delays and early departures – though customer service complaints fell in the same period.

Bus complaints rose slightly (by eight per cent) against a slight increase in journey numbers. The main drivers for this rise were complaints about gaps in service and buses being stopped short of their scheduled destination.

Recent changes to our web forms have been a contributing factor on the changes seen on ticketing, with contactless rising slightly while Oyster fell 16 per cent against a two per cent fall in journeys.

Overall, both journeys and complaints rose this quarter; journeys by one per cent and complaints by four per cent.

London Underground complaints are currently tracking 16 per cent lower than last year and are lower than the rolling average. Elizabeth line shows similar performance, currently 13 per cent lower than last year and also below the average. Other rail modes are currently tracking above both the previous year and average.

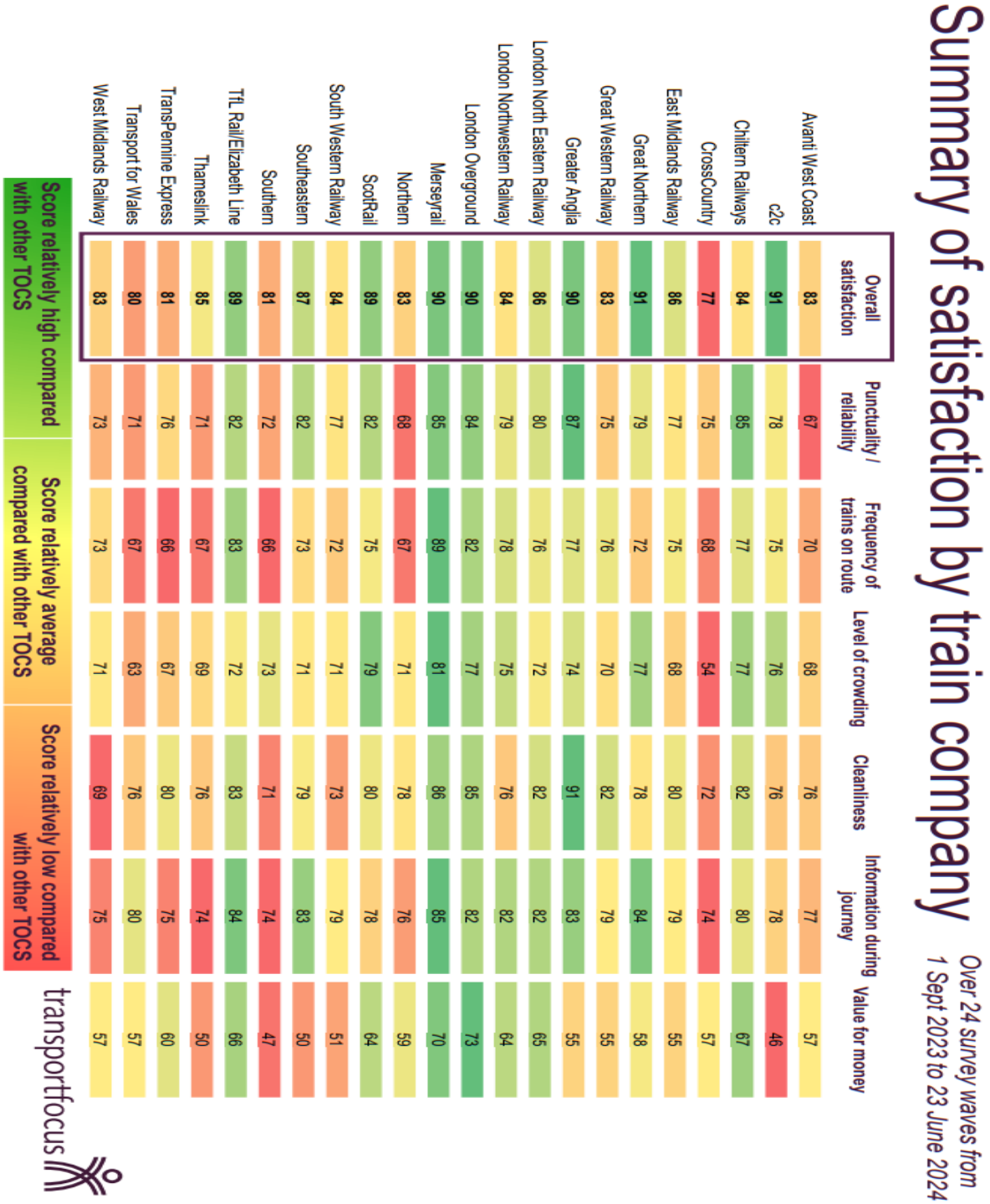
Bus complaints per 100,000 journeys are also currently higher than the average and are one per cent higher than the last financial year.

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

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

Rail User Survey: train operator results (Transport Focus, July 2024)

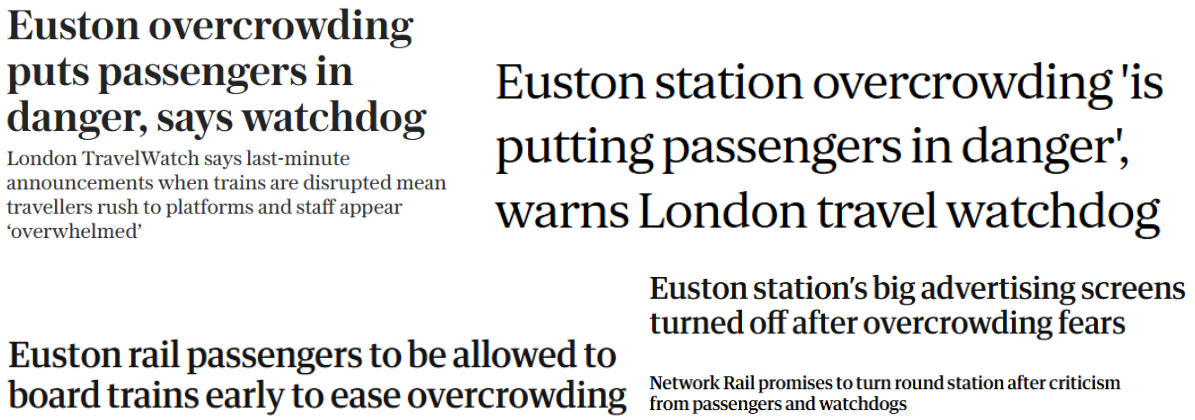
The TOCs in the table below traditionally labelled as London and South East operators are: c2c, Chiltern Railways, Greater Anglia, Great Northern, Great Western Railway, London Overground, South Western Railway, Southeastern, Southern, TfL Rail, Thameslink and West Midlands Railway.



Top stories in October

Euston station overcrowding

London TravelWatch's statement around issues with overcrowding at Euston station was widely covered across major news outlets including the BBC, Standard, Guardian and Telegraph. Follow-up statements were also widely picked up throughout the month, with extensive coverage across national and local press.



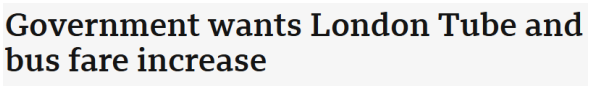
TfL cyber attacks

There was ongoing coverage of the TfL cyber attack, with concerns that young people were still unable to renew their travelcards. London TravelWatch is continuing to work with TfL to ensure communications to passengers are improved.



Budget

A budget document confirmed that rail fares would rise by 4.6%, and that railcards would go up by £5. It is also expected that TfL fares will increase next March.



Nationally, there was coverage of the increase in the bus fare cap from £2 to £3.



As widely expected, the Chancellor also confirmed that HS2 trains would run to Euston.