

Getting on board with new passengers

A discussion paper: How will we use public transport post-Covid?



Foreword

If the last 12 months has been a period of unprecedented disruption, the next 12 months is likely to be a period of unprecedented uncertainty. Covid-19 has brought the most significant peacetime disruption to modern London's way of life. Throughout history, London has shown itself to be resilient, but that resilience has not always been pain-free. Ensuring a swift social and economic recovery will require dynamism, coordination, and confidence, but also time for the spectre of new waves and variants to recede. This will affect our behaviour in ways we cannot yet fully predict. And nowhere is the impact of this uncertainty more significant than on public transport.

Precisely how, when, or where passengers will return to the public transport networks that keep London moving is unclear. The perception that public transport is a uniquely risky environment persists, despite a wealth of scientific evidence to the contrary. The daily commute that has been the focus of the capital's transport planning and the bedrock of Transport for London's (TfL's) funding will not revert to its pre-pandemic volume and patterns. But the human interactions that drive the social and economic life of London is already returning, albeit tentatively. Some survey data explores Londoners' expectations of what a more stable "new normal" might entail, but people are notoriously bad at predicting their own future behaviour.

Amidst all this uncertainty we must not forget that both short-term and long-term imperatives require more public transport, not less. London does not work and cannot remain competitive without effective public



transport. And when we look further ahead, our ambitious decarbonisation targets make cleaner and more efficient movement non-negotiable particularly in a dense urban environment, that requires a combination of public transport and active travel.

Whilst seizing and developing this vision will involve choices, these decisions are taken in different places and with differing impacts. London has no CEO and coordination is complex even at the best of times.

The Mayor's role as Chair of TfL sits among the most important aspects of the job description but City Hall's powers are limited, central government retains direct control in many areas of public life, and there are 33 local authorities within the city limits. The private sector is also a patchwork of collaboration and competition. And even where a clear locus for decision-making exists, data on what Londoners actually want and need from the city is often far from complete.



The task for transport planners in the coming months is unenviable. Since its inception two decades ago, TfL has proved itself adept at running London's public transport. The value of an integrated transport authority has been proved with enhanced services, increasing passenger numbers, and rising satisfaction with the network. But balancing supply, demand, and real revenue pressures is no easy task. As we look beyond the immediate

challenges, there is both opportunity and risk. We will all be forming new habits over the next year, and there is an urgent need to ensure that public transport services are available, safe, and appealing if we are to avoid undoing the progress we have made in increasing the share of journeys taken by sustainable transport. As the pandemic recedes and confidence returns, we will need to come back to the harder task of incrementally growing sustainable mode shares. To achieve this, we will need to understand what post-pandemic passengers need, expect, and want from the transport network. This discussion paper is a stimulus for those conversations.

I am very grateful to transport consultant, Charlotte Warburton, for offering so generously of her time to think about these issues. This resulting paper focuses on what future travellers might do and expect from public transport. From this emerges a sketch of the potential changes in demand induced or accelerated by the pandemic and the resulting passenger types that could emerge in the 'new normal'.

It follows consultation with a range of London First members and stakeholders and, whilst it is not comprehensive and the passenger profiles outlined below are neither exhaustive nor exclusive, we hope it provides a starting point for discussion about what Londoners need from their transport network, their transport authority, and their city.

The concluding recommendations highlight some urgent decisions, such as securing a continuation of TfL's emergency funding and a coordinated campaign to reassure and encourage passengers as they return to public transport. Others, including a long-term sustainable funding deal for TfL, experimenting with new modes and services, and prioritising integration and passenger information systems could be taken without any regrets. But we recognise others present longer-term challenges: fair reforms to fares; more cohesive decision-making across the city; and an honest conversation with Londoners and other stakeholders about the role road user charging could play in the capital. We welcome further thoughts and engagement on these topics from individuals, businesses, and policymakers as we collectively seek to Renew London.



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Consensus and uncertainty

More than once in the last year, London's public transport system has been forced to change overnight. It continues to need to adjust dynamically to meet immediate and evolving passenger needs as the public health situation evolves and public behaviours change. However, there is a growing consensus that some of the trends the pandemic has accelerated and the shifts in behaviour it has caused are here to stay. The most discussed of these is perhaps the increase in flexible working, but others such as the increase in home retail deliveries deserve similar attention.

This presents both an opportunity and a challenge. The opportunity to build back better, responding to these changes for the medium term to enable the capital to remain a leading global city and be a core enabler to the national levelling up agenda. The challenge is how to meet the new demands of passengers whilst addressing the pre-existing transport issues the capital faced prior to the pandemic. Many of these have been magnified or accelerated over the last 12 months, not least TfL's funding model, which was over reliant on fare income.

If proactive decisions are not made, and action is not taken now to tackle these changes whilst simultaneously facilitating the UK's transition to net zero carbon emissions, then the risk is a cycle of decline. A degraded travel experience across the capital will drive people away from public transport – and, in the worst-case scenario, away from London – leading to further budget pressures, subsequent service reductions and the risk of a car-based recovery.



Any positive alternative vision relies on efficient and sustainable transport networks:

- If London is to remain a great city and continue to be a leading global capital, using the pandemic as an opportunity to adapt and set itself up for future growth, then the Londoners and visitors who generate this buzz will need to move around the city in significant numbers and at speed.
- If the centre is to remain a vibrant agglomeration of hospitality, retail and commercial services that people use for both business and leisure – albeit with new patterns of usage – then significant radial passenger flows into a dense Central Activities Zone will still be critical.
- If town centres in Outer London continue to develop in their own right enabling people to work and play in closer proximity to their homes, public transport will need to support and enable this increased demand.
- If London is to continue to grow then – despite the current pause, reassessment, and perhaps after a period of smaller-scale interventions to enhance the existing network – large capital infrastructure projects will be required once more to support regional and national economic growth.
- And if critical public policy objectives are going to be met – from decarbonisation and air quality improvements to the Mayor's target of 80% of journeys around the capital being taken by public or active transport by 2041 – the city will need more public and sustainable transport, not less.



There is no version of these futures that does not rely on good public transport. A fit for purpose transport network that meets passenger demand sustainably remains critical to London's short-term recovery and long-term growth. But in order to make these sustainable solutions appealing to passengers, they will need to be dynamic and responsive, as the city transitions through the phases of the pandemic to arrive at the 'new normal'.

London's medium-term success will depend in large part on its ability to tackle some of the thorny, pre-existing transport pressures and policy constraints, such as the integration of different transport modes across its 33 boroughs and driving down congestion on the

roads. Uncertainty also remains regarding which of the accelerated macro trends and changed passenger behaviours will stick. Will online shopping demand remain at the levels we have seen during the pandemic? How will people reallocate their time as we transition to the 'new normal'? How can the capital encourage people spend this time making more use of the capital's services and facilities which provides a balanced, happy lifestyle whilst supporting economic recovery?

What is clear is that London's public transport network must address the needs, expectations, and desires of passengers if we are to ensure sustainable and effective public transport services in the future.

Pre-pandemic transport pressures

Before assessing the impact of the pandemic, we must be clear about the pre-existing challenges faced by London's public transport system. Many of these have been magnified or accelerated over the last 12 months and, as a result, returning to the world as it was in January 2020 is not an option. This table explains how pre-existing challenges, combined with the impact of Covid-19, has shaped future policy considerations.

Pre-existing challenges	Impact of COVID-19	Future policy considerations
<p>Coordination across London boroughs</p> <p>How to deliver a capital-wide, seamless customer experience across boundaries</p>	<p>Conflicting decisions on new schemes (e.g. e-scooters) and imperfect refactoring of space, negatively affecting some end user experiences and perceptions.</p>	<ul style="list-style-type: none"> • Refactoring of networks and space to provide infrastructure and services based on customer and city needs, environmental impact, revenue generation gap • 'Capital Join Up' Charter to establish common planning and operations principles across boroughs enabling consistent transport services across the capital
<p>Funding model</p> <p>Unsustainable public transport financial model with over reliance on fare box revenue to operate the network</p>	<p>Insufficient revenue through the pandemic to operate public transport. But overnight abolition of fares on some public transport services proved change can happen quickly when desired.</p>	<ul style="list-style-type: none"> • Funding model - the identification of alternatives, transparency of costs to users • Dynamic fare strategy - to reflect 'on demand', personalised services
<p>Mixed economy</p> <p>Need for a focus on inclusion and access for all, rather than 'one size fits all' services</p>	<p>No longer a captive customer market, people actively chose alternate modes or different ways of doing things (WFH, online shopping).</p> <p>Fare structures shown to be insufficient with season tickets lacking flexibility and greater need for integrated tickets across modes.</p>	<ul style="list-style-type: none"> • Customer Service Mindset operator model based on providing services for different customers with different preferences and service level tolerances • Multi modal integration without sacrificing accessibility improvements, embrace different modes / transport types (private hire, micromobility etc) as part of the network

Pre-existing challenges

Impact of COVID-19

Future policy considerations

Integrated public transport network

Poor modal integration – especially for first and last mile

Faster return to cars highlights which options users currently find easiest with a lack of consolidated, multi modal transport information to inform operations and travel decisions.

- **Capital infrastructure investment** to facilitate modal integration
- **Travel information and data standards** to provide transparency and facilitate easy mode switching

Network operator model

Franchise model is not set up to meet on demand, adaptable services

Rail franchises were unable to stay afloat without state support and the delivery of alternative services overnight – required significant effort.

- **Funding model** – establish new revenue / cost model encouraging investment

Net zero agenda

The urgency of the 2030 agenda

Prioritisation of active, green travel and a desire to prioritise green initiatives that stimulate investment, boosting economic recovery.

- **Net Zero policy** initiatives to deliver the green agenda and employment opportunities
- **Capital infrastructure investment** – to focus on ‘decarbonisation now’ agenda i.e. freight links to reduce HGV / LGV in London, water network development, bus electrification

Congestion

Progress in reducing congestion had stalled prior to the pandemic, and is now in reverse

Moderate to high congestion returning due to increased car use and competition for space, highlighting the inadequacy of the congestion charge.

- **Road user charging** – explore pricing options to generate a better service for road users and enable efficient usage of limited road space (i.e. if you pay X, you get Y)
- **Customer incentive models** – flexible mechanisms to encourage alternative transport choices

Air quality

Londoners have been given a taste of success in the first lockdown but long term goals require more action

Air quality improved initially due to lack of cars on the roads and many Londoners want the positive impact to remain but the gains are being lost due to increasing car use and congestion.

- **Prioritise net zero investments** and initiatives, many of which have positive air quality externalities (eg transition to electric vehicles, congestion reduction)
- **Improve first/last mile** connections to encourage a move away from private car use
- **Public health** – encouraging active travel for the sake of tackling obesity and other health issues

A year of disruption

The impact of the pandemic on public transport has been significant, changing overnight how customers use its services, with knock-on implications for the operation of other transport modes across the capital. Transport Focus has documented the changing picture as national public transport ridership has dropped at times to between 16-20% of previous levels. Current social distancing rules cannot be maintained if ridership returns to around 60% of pre-pandemic levels or more.

People have been hesitant to use public transport due to the perceived health risks, and getting people safely and comfortably back onto the network is a significant short-term challenge. In the medium-term the impact of wider trends accelerated by the pandemic is like to have a lasting impact on people's desire to use a one size fits all public transport offering.

Customers want greater modal choice at the times that suit them, based on their different preferences (or perhaps tolerances) for time of journeys, proximity to others and cost of fares. The current hesitance to use public transport services resulted in road usage increasing before the second national lockdown (63% increase in drivers / 34% increase passengers in cars), with 67% of a sample of Londoners polled indicating they may stick with cars in future, irrespective of the changes to congestion charging that have been introduced.

Congestion and heavy traffic continue to increase with moderate congestion rising from 19% to 63% and heavy congestion increasing from 3% to 21%. The repurposing of street space (for both active travel and creating more pedestrian zones – two out of five journeys are now on bike or foot) and increasing trends of home deliveries add to the challenge.

Travel from outside the capital, often-longer distance journeys, into the centre (radial travel) has reduced. However, there is increased demand to transition in-between smaller metropolitan centres and urban villages within the capital (orbital travel), highlighting the inefficiencies and lack of integration between public transport modes to do so easily.

This significant overnight change calls into question what transport services should be provided, and how. It has also shown that although the network can rapidly change under pressure, the system is financially fragile and lacks the resilience to operate without external support. There is an over reliance on a narrow range of funding sources, which governments are now being forced to address. 'One size fits all' public transport is no longer sufficient. Personalisation, adaptability, and real time, joined-up information to inform choice is going to be essential going forward.



Implications for passengers in the new normal

The pandemic has provided the catalyst to accelerate a number of trends, making future risks and opportunities a reality now. This has influenced how passengers use transport during the pandemic, but also provoked people to consider how they want to live and spend their time going forward.

Pre-existing challenges

Future policy considerations

Working from home

- Flexibility of working hours to suit personal needs – an increasing number of people no longer governed by fixed working hours
- Unpredictable travel plans, changing travel times to meet personal priorities (health, pricing, caring responsibilities) rather than accept blanket services
- Willingness to commute longer but less often

Online shopping and service delivery

- Creates the opportunity for people to reallocate their time to other activities, be that work or play
- Increase in delivery vehicles on the roads – one to one or one to many increasing all types of delivery vehicles
- Greater numbers of people remaining within their local areas day to day (either walking or cycling) to access daily goods and services

Personalized, on demand transport services

- Need for real time travel information – passengers want more choice readily available from one source, no longer 'captive' audience
 - Public travel has to work for passengers' otherwise select alternate modes vs. previously plan commute around transport availability.
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Pre-existing challenges

Changing commuter patterns and modal preference

Future policy considerations

- Move into single person car journeys – risk a permanent shift
- Leads to unpredictable travel patterns, greater choice of travel timings, less travel into the city centre daily
- Desire live / work within a close vicinity, networks to travel as needed
- Save money / time not commuting – actively re-prioritise these sources

Prioritization of health and well being

- Preference for active travel choices - taking advantage of improvements in clean air, delivers personal direct benefit
- Demand for real time information of what is available where
- Wider societal change - reduced impact on the NHS as a result of increased active travel

Increased technology fluency and acceptance

- Acceptance and proactive adoption of technology to facilitate living and working locally, reducing further the need to travel
- Enables passengers to reallocate travel time for other purposes, but increases the need for real time, integrated information
- Willingness to adopt new, emerging 'green' travel technologies as alternate modes of transport

Some of these behavioural changes will be temporary, others permanent. Even a relatively small increase in working from home renders the pre-pandemic funding models redundant, as outlined in the recent London First report with Arup, Transport in London. Greater technological fluency and demand for personalised services brings the challenges of the mixed transport

economy and network integration to the fore. The reprioritisation of health and wellbeing could potentially produce new tensions with an increasingly on demand approach to retail and service delivery.

The types of passengers that will emerge from the pre-pandemic challenges and the trends that have been

accelerated are not abstract statistics in a passenger database. One size will not fit all and the transport requirements of these groups need to be considered as important decisions are taken – both about how we reopen the city and how we build back better in the long term.

Post-pandemic passenger types

This paper intends to provoke thought and discussion about what Londoners need from the capital's transport network as the city emerges from the pandemic. The following table provides a framework for thinking about different types of London transport user going forward, capturing both their needs from the transport network and the impacts of their travel choices on the capital's priorities and transport revenue flow.

It is not a comprehensive list of how everyone will use the network but is an indication of some of the most significant changes in how Londoners and visitors travel around the capital.

Passenger type	Impact on London	Impact on public transport revenue	Impact on passenger expectations
 <p>Long Haulers live outside of the capital, work from home more, travel less hence have a willingness to commute longer (2 hours+). Looking to see more people in different places when coming into the capital's centre.</p>	<ul style="list-style-type: none"> • Reduction in daily commuters • Incentives needed to encourage longer stays • Greater modal integration and choice needed to ease connections once in London 	<ul style="list-style-type: none"> • Passenger spend remains within public transport (TfL, rail franchises etc) but reallocated and likely reduced • New 'value add' revenue source opportunities 	<ul style="list-style-type: none"> • Flexible, cost efficient ticketing • Digital connectivity – effective work while travel
 <p>'Village' Dwellers have everything they need to work and live within the vicinity of their urban village. Spend more time in the village. They do have a willingness to go into the centre or other villages for specific purposes.</p>	<ul style="list-style-type: none"> • More encouragement needed to visit non-local London attractions • Incentives necessary to reduce car use 	<ul style="list-style-type: none"> • Reduction of public transport revenue; remains in passenger purse or flows to private revenue • Opportunity if private modes are brought into the TfL 'family' 	<ul style="list-style-type: none"> • On demand public transport • Greater green options and integration

Passenger type	Impact on London	Impact on public transport revenue	Impact on passenger expectations
 <p>Active Commuters use the commute as an opportunity to get active, improve their quality of life, have positive impact on the environment</p>	<ul style="list-style-type: none"> • Will continue to want space re-allocated for safe active commutes 	<ul style="list-style-type: none"> • Reduction of public revenue; largely remains in passenger purse 	<ul style="list-style-type: none"> • Safe space to commute • Clean air • Reduced congestion
 <p>Reliant Ones little opportunity to work from home, dependent on public transport to get them where they need to be at the time they need. Many with physically demanding jobs, many key workers, with irregular work patterns and often limited alternatives to public transport</p>	<ul style="list-style-type: none"> • Changing travel patterns and opportunity to flatten peak travel requires fresh attention • Incentives needed to avoid those with private vehicles returning to them 	<ul style="list-style-type: none"> • Price sensitive group with few alternatives – should not lose out from changes • Revenues continue to flow primarily to public transport 	<ul style="list-style-type: none"> • Certainty and accessibility of service • Greater choice – mode, integration and timings • Dynamic but fair pricing models
 <p>Convenience Kings prioritise personal satisfaction and convenience over conscientiousness (either environmental or financial) to meet their preferences and tolerances</p>	<ul style="list-style-type: none"> • Need personalised incentives for non-car use • Focus on integration of modal services to promote public transport choices 	<ul style="list-style-type: none"> • Mix of public and private revenues • Greater private premium • Opportunities for more 'value added' services 	<ul style="list-style-type: none"> • On demand, tailored services • Ease of use and access to information • Willing to pay a premium

Passenger type	Impact on London	Impact on public transport revenue	Impact on passenger expectations
 <p>Day Trippers / Long Weekenders exploring the capital's culture and services, with public transport enabling movement around the different areas of the capital easily. Provides an opportunity to double down on leisure, retail, culture and business opportunities locally and internationally</p>	<ul style="list-style-type: none"> • Opportunity for package deals that include public transport with accommodation and attractions • Incentives may be needed to tempt visitors onto public transport 	<ul style="list-style-type: none"> • Mix of public or private depending on need • New 'value add' revenue source opportunities • Flexible ticket pricing for groups, longer stays etc 	<ul style="list-style-type: none"> • Readily available information to make informed choices • Greater choice – mode, integration and timings
 <p>Reluctant Returners cautious about returning onto public transport due to the virus health concerns, minimising use of public transport travel out of their local vicinity unless essential. Preference for personal vehicle or single use private hire.</p>	<ul style="list-style-type: none"> • Reduction in daily commuters and challenges attracting other visitors to the capital • Prioritise safety messaging and incentivise passengers to return to public transport / de-incentivise personal vehicle and private hire use 	<ul style="list-style-type: none"> • Reduction of public revenue likely; remains in passenger purse or flows to private revenue 	<ul style="list-style-type: none"> • Reassurance of health and safety of using public transport – readily available information on transport choices

The power of changing passenger preferences to force change across the transport network has been demonstrated through the pandemic. Whereas other industries embrace responding to customer change through personalising services and continuously adjusting to meet changing needs, transport has been historically capacity driven rather than demand led. The pandemic provides the catalyst to force public transport to catch up, which is essential if public transport is to remain at the core of the capital's global ambition.

Recommendations

As London begins to unlock and look towards recovery, it is important that we adapt to passenger needs as they will be post-pandemic, not as they were pre-pandemic. While many things have yet to settle, there are some clear challenges that require a response. This is a challenge for all links in the transport provider chain. The shift in passenger behaviours that started well before the pandemic should not be underestimated. There are urgent steps to be taken now; there are “no regrets” moves that should be made in the coming months; and there are longer-term challenges that we need to start to grasp.

Urgent steps

Secure an extension to TfL's emergency funding deal.

Keeping public transport services running in the capital is essential to the city's social and economic recovery. As we start to unlock following the pandemic, this will have widespread impacts on the economic situation across the UK. But it will also matter to passengers. Groups such as those we have referred to as the RELIANT ONES cannot work from home and they rely on London's public transport infrastructure. Marginal short-term gains from funding and/or service level cuts runs the risk of stunting the recovery and placing an unfair and disproportionate burden on those who have kept our essential services running over the course of the pandemic. **It is essential that City Hall and central government agree a continuation of the emergency funding deal already in place until a long-term deal is struck.**

A coordinated public transport campaign to reassure and re-engage.

The importance of high-quality public transport services being available throughout the recovery is not limited to those who have relied on these services continually over the last year. Other passenger groups will return to the network over the coming months and their initial impressions are likely to shape their medium-term behaviour. It is likely that the return to public transport will be driven by a mix of work and pleasure. Reuniting with friends or getting a culture fix that's been missing for the last year will motivate DAY TRIPPERS, whilst some of those who have relocated either temporarily or permanently to places outside the city will be discovering new commutes as LONG HAULERS. For both of these groups the inertia of the last year must be overcome. But for the RELUCTANT RETURNERS it is a specific fear of public transport that must be overcome. Many in this group internalised the instructions to avoid public transport (particularly in the first lockdown) as an indication that public transport was a uniquely risky environment. **There is a need for urgent coordination between City Hall, TfL, transport operators, Network Rail, central government, and business and community groups to reassure and re-engage passengers. This should be a single integrated campaign and aligned with the Government's roadmap for unlocking. The starting point should be TfL's “ready when you are” campaign. This should then evolve into a proactive campaign about the opportunities that public transport enables, in close**

collaboration with London & Partners campaign, as we move to Step Three of the Government's unlocking plan (no earlier than May 17).

No regrets moves

Secure a sustainable, long-term, funding model for TfL.

ALL PASSENGERS will benefit from a strong and sustainable integrated transport authority. TfL has shown the value of this approach over the first two decades of its existence. London, and particularly the central activities zone, cannot function without good public transport. However, technology and consumer behaviour was combining prior to the pandemic to change the way in which people travel around the city. **City Hall and central government must work collaboratively to develop a fair and sustainable funding model for TfL that supports the policy objectives for the city in the 2030s (and the investments that they require), rather than recreating the structures of the 2010s.**

Experiment with new modes and infrastructure to facilitate local journeys.

New technologies and behaviours will require experimentation and iteration in order to find an equilibrium that works for the city as a whole. The ambition of the rapid changes made to London's roads over the last year should be applauded, and the new URBAN VILLAGE DWELLERS combined with the rise in ACTIVE COMMUTERS will likely necessitate further such interventions. However, as with

any experiment, some things will not work and will need to be removed or reversed. Changes that facilitate easier public transport and active travel options will also be vital for ensuring that CONVENIENCE KINGS do not revert to private vehicles. **TfL and local boroughs need the resources and powers to move swiftly and smartly to facilitate the likely rise in local and active journeys, many of which will have wider positive externalities for local communities and improve London's attractiveness as a place to live and work.**

Prioritise integration and passenger information systems.

The CONVENIENCE KINGS are also likely to rely much more heavily on real-time data when making snap decisions about the most convenient way to take a journey. Similarly, they are likely to negatively weight journey options that involve changing modes unless they are reassured that the individual legs of their journey are seamlessly integrated. Similarly, three of the passenger groups (LONG HAULERS, DAY TRIPPERS, and URBAN VILLAGE DWELLERS) are increasingly likely to be taking journeys infrequently. The habits that accrue from a five-day-a-week commute will be lost and the availability of real-time data will be critical to decision-making. Passengers tend to think of each journey as a single thing, from their origin to their destination. For LONG HAULERS these will be further apart and risk a higher number of legs with multiple mode changes, whilst for URBAN VILLAGE DWELLERS a weekly journey beyond their village may become more daunting as their familiarity with different modes and interchanges decreases. **Fully integrated passenger facing information based around open data should be the ambition. To achieve this requires more data collaboration between all transport providers both**

public and private, which can be realised through the framework set out in the London Data Commission, in which the GLA provides leadership with a new Data Charter underpinning the principles, practices and resources needed for collaboration.

Longer-term challenges that demand further discussion

Develop fair and appealing ticketing options.

The pandemic has broken both the franchise model for mainline rail services, and TfL's funding model. It is unlikely that the ticketing solutions that supported these two structures will be the right ones to support the new structures that emerge in the coming months. But it is abundantly clear that the existing ticketing options do not work for passengers. The RELIANT ONES remain financially stretched and pushed onto slower bus journeys because rail options are unaffordable. The spontaneous DAY TRIPPERS are put off by high turn up and go prices on the railways. And LONG HAULERS will visit the capital even less frequently if the ticketing options do not facilitate discretionary trips. On the other hand, RELUCTANT RETURNERS may need financial incentivisation to get back on the network. **Transport operators should be given the flexibility to experiment with new forms of ticketing to encourage public transport use, both as passengers return to the network in the short-term and as they consider their longer-term travel patterns. This is likely to result in wholesale reform of both the mainline rail ticketing structure and TfL's fares structure, and attention must be paid to ensuring that the network remains inclusive and accessible to all.**

Ensure that decision-making is cohesive across city-regions.

Few, if any, passengers care about political or operational boundaries when considering their journeys. CONVENIENCE KINGS do not want to use multiple apps. ACTIVE COMMUTERS are frustrated by cycle lanes that run out at a borough boundary. And the LONG HAULERS and DAY TRIPPERS arriving from outside the M25 get frustrated by the friction between the mainline rail network and TfL services. **Some of this may be solved by greater devolution of services within London's functional economic geography, but there remains low-hanging fruit that should be prioritised, particularly between boroughs and TfL on the roads, and between TfL and other operators to provide integrated ticketing products.**

Build consensus on future priorities for road use.

The pandemic has reminded us that despite the policy debate focus on anything that runs on rails, London's roads are a fundamental and over-stretched part of the transport network. Any changes to how we allocate this limited space will involve winners and losers. But whether it is the need to make bus services more reliable and more attractive, or the health and environmental benefits that come from more active travel, or the economic competitiveness that is lost because of congestion, or the massive infrastructure and taxation shifts that electrification necessitates, we are no longer able to ignore the challenges on London's roads. **It is time for a serious conversation about how we use and pay for London's limited road space. This is not a technical challenge but a political one and will require good faith engagement from all parties and patient consensus building.**



Our mission is to make London the best city in the world in which to do business.

London First was set up by business leaders with the belief that by harnessing business assets we can drive positive change. We operate as a business campaigning force, with over 175 members, and are uniquely placed to champion the city:

- We've done it before: back in the 1990s, London's prospects looked bleak. Business leaders came together to lead when others wouldn't;
- We've achieved a lot: over the past three decades, we've campaigned for the creation of the office of London Mayor and Transport for London, for Crossrail, for congestion charging and for expansion at Heathrow; we incubated Teach First and created the UK's largest annual jobs and careers fair for school leavers, Skills London;
- We give London's employers a powerful voice, prioritising the critical interventions needed to keep our capital competitive and connecting with allies to create solutions that help our country succeed as one.

Now, we're stepping up once again. With our members – and the millions of people they employ in the UK – we are pursuing a recovery agenda that will keep London at the forefront of global business, working with and for the whole UK.

You can also find us on Twitter **@London_First** or at **londonfirst.co.uk**

We'd like to hear from you

How do you think passengers' behaviours and expectations will change post-Covid, and what do you want to see from public transport providers in response?

Given the changing nature of passenger demand and expectations, how can London develop a fares structure that is both fair and provides adequate funding for the network?

What are the priorities for integration and cohesive decision-making across modes and political jurisdictions?

What are the principles that need to be built into any future road user charging system in order to make it appealing to Londoners and their representatives?

If you'd like to discuss these questions or indeed others, please contact:

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We welcome further thoughts and engagement on these topics from individuals, businesses, and policymakers as we collectively seek to Renew London