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|--|------------------------|
| <b>Committee(s)</b>  | <b>Dated:</b>          |
| Planning and Transportation Committee                                    | <b>29 May 2018</b>     |
| <b>Subject:</b><br>Transport Strategy - Phase one engagement report      | <b>Public</b>          |
| <b>Report of:</b><br>Carolyn Dwyer – Department of the Built Environment | <b>For information</b> |

### **Summary**

The City of London Corporation is currently drafting its first long-term Transport Strategy. This will set the 25-year framework for future investment in, and management of, the Square Mile's streets.

The development of the Transport Strategy will be informed throughout by thorough stakeholder engagement. The first phase of engagement – to identify key issues and challenges – took place in February and March 2018.

This report outlines the activities undertaken during this phase of engagement and the key themes emerging from this engagement – details findings are provided in Appendix 1.

### **Recommendation**

Members are asked to note the report.

### **Main report**

#### **Background**

1. The City of London Transport Strategy will identify the key transport issues and challenges facing the Square Mile and develop the proposals to respond to these. It will cover the next 25-years and will be supported by a series of short-term and regularly updated delivery plans, including the City Corporation's Local Implementation Plan (LIP). The LIP is a statutory document that will set out how the City Corporation will deliver the Mayor of London's Transport Strategy (MTS).
2. The development of the Transport Strategy and LIP will be informed throughout by thorough stakeholder engagement. The first phase of engagement – to identify key issues and challenges – took place in February and March 2018. The results of this engagement have informed the development of the vision, aims and objectives for the Transport Strategy, and will inform the development of proposals to deliver these objectives.
3. A second engagement phase will allow the City's businesses, workers and residents, and other interested parties to comment on the vision, aims and

outcomes for the Transport Strategy and LIP. This consultation will then run for eight weeks from 4 June.

4. The results from these first two phases of engagement will inform the development of detailed proposals to be included in the draft Strategy and LIP. Consultation on the detailed proposals will take place in November and December 2018. The final Transport Strategy and LIP will be published in March 2019.

### **Phase one engagement activities**

5. The engagement activities undertaken during the first phase were:
  - a. **Public survey:** The City Streets public survey opened on 3 February 2018 and ran for eight weeks. 1949 people accessed the survey. Survey question topics included: perceptions of the City's streets, desired priorities for the use of streets and kerb-side space, and ideas and suggestions for future street and transport improvements. Promotional activities included:
    - Articles/adverts in City Resident, City AM and City Matters
    - On-street distribution of flyers, including through Cheapside Business Alliance Ambassadors
    - City of London newsletters, e.g. Active City Network, City Police, Business Healthy and CityAir
    - City Centre newsletters and events notifications
    - Twitter, with regular tweets from @squarehighways and promoted tweets from @cityoflondon, plus retweets from other City of London accounts
    - City Corporation website – home page and Transport Strategy page
    - Letters to residents of Mansell Street and Middlesex Street estates, Barbican e-broadcast, and Barbican and Golden Lane noticeboards
  - b. **Stakeholder workshops:** Seventy-seven representatives from City businesses, transport user groups and other organisations with an interest in transport in the Square Mile attended workshops to share their views on the transport challenges and opportunities.
  - c. **Citizens Panel:** Populus have been appointed to facilitate a Citizens Panel of City workers and residents. This panel will meet three times during the development of the Transport Strategy and will enable us to gain a deeper understanding of residents and workers' transport needs and concerns. Approximately 40 people – half residents, half workers – attended the first panel workshop on the evening of 20 March 2018. Attendees took part in exercises and discussion tasks aligned to the City Streets survey questions, with Populus staff facilitating the discussion.
  - d. **Drop-in sessions:** Nine drop-in sessions were held at various locations around the City. Members of the Strategic Transportation team were available to answer questions about the Transport Strategy and discuss transport issues. A combination of lunchtime and evening sessions aimed to make the drop-ins accessible to both City workers and residents. The

sessions were advertised on the City Corporation website, through flyers distributed at events and on-street, and through City Corporation social media.

- e. **City Streets exhibition:** A supporting exhibition was held at the City Centre on Basinghall Street from 5 February to 31 March 2018. The exhibition took visitors through historic and recent changes to the City's streets and presented future challenges. More than 7000 people visited the City Centre over the two-month period.

## Engagement findings

6. Over 2000 individuals who work in, live in, study in or visit the City of London were engaged through the activities described above (excluding visitors to the City Streets exhibition). Comments and responses have been analysed and the results are set out in the *City of London Transport Strategy: Phase one engagement report*, provided in Appendix 1. This will be published on Transport Strategy web page and publicised alongside the consultation on the draft vision aims and outcomes.
7. The key themes emerging from the comments, suggestions, and ideas received (ordered by the most common themes emerging from survey respondent comments) were:
  - a. **Key theme 1 – Traffic levels on City streets are too high:** Over 1400 (or four in five) survey respondents felt that motor traffic levels on City streets are too high. Instituting targeted or City-wide restrictions on motor vehicle traffic was the most commonly requested action from the Improving the City's streets question responses. Respondents felt that air pollution and the unpleasantness of motor vehicle-dominated spaces were the main problems caused by traffic. Fewer than 3% said that traffic was an issue because it delayed cars. Traffic levels were also raised as a concern at most workshops, with construction traffic and large numbers of private hire vehicles mentioned most often as causes of excessive vehicle numbers.
  - b. **Key theme 2 – Prioritising people walking:** Approximately 1500 (or three in four) respondents identified themselves as people who walk on City streets. A significant majority of survey respondents felt that not enough street space was allocated to people walking. Respondents clearly ranked pedestrians as the desired first priority users of City streets, with private motor vehicles ranking last. More space for people walking was the second most commonly requested action from the Improving the City's streets question responses. Space allocation was also a key theme emerging from all workshops, with many attendees suggesting that pavement space allocated to people walking is not sufficient given the number of people moving around the City on foot; especially at peak times and near stations. Safety of people walking was also a key concern for the Citizens Panel, with improved crossings and less traffic seen as key to reducing road danger for people walking. The Citizens Panel also commented on the need to better maintain pavements.

- c. Key theme 3 – Improved cycling infrastructure and safer cycling:** A majority of survey respondents felt that people cycling were under-prioritised and given too little space on City streets. Protected cycle lanes were the single largest street infrastructure improvement requested by survey respondents. Respondents also ranked cycle parking as the second desired priority of kerbside space usage. However, conflicts between people walking and cycling was also one of the top ten comment themes identified in the Improving the City's streets question responses. Safer cycling environments and other cycling infrastructure improvements were also commonly requested actions. Workshop and Citizens Panel participants also identified the challenges posed by conflicts between people walking and cycling. Many suggested further separation of these two modes, alongside separation of walking and cycling from motor vehicle traffic.
- d. Key theme 4 – Greenery, seating, and improving the public realm:** Greening the City was the largest non-transport mode specific request made by survey respondents and ranked sixth overall for most mentioned comment type from the Improving the City's streets question responses. Respondents ranked greenspace and seating as the first desired priority for kerbside space usage. Respondents also scored noise levels and the ease of finding seating the second and third lowest out of the 10 indicators of healthy, vibrant streets (only air quality scored poorer).
- e. Key theme 5 – City air pollution needs immediate improvement:** Survey respondents scored the quality of the City's air the lowest out of 10 indicators of healthy, vibrant streets. Improving air quality was the second largest non-mode specific request made by survey respondents. Air pollution was also the most common barrier to travelling to or around the City raised by disabled people. Both the stakeholder workshops and the Citizen Panel mentioned air quality as a key challenge the City needs to tackle immediately.
- f. Key theme 6 – Support for using streets more flexibly:** The opportunity of using streets more flexibly to accommodate the various demands on them at different times of the day was highlighted at most workshops. Specifically, timed restrictions on motor traffic was also requested by a number of survey respondents, particularly in relation to freight vehicles.
- g. Key theme 7 – Improved accessibility on City streets:** Approximately 7% of survey respondents reported having an activity-limiting health problem or disability, with more than 100 of these individuals leaving comments on how to make the City a more accessible place, namely through reducing both air pollution and motor vehicle volumes. Citizen Panel and workshop participants also highlighted improving accessibility on City streets through minimizing pavement obstructions, introducing more drop kerbs, and through reducing motor vehicle dominance on City streets. Construction-related activities were also seen as a significant barrier to pedestrian accessibility.

**h. Key theme 8 – The need to improve the management of freight:**

Despite the relatively low numbers in the City, freight traffic was seen by nearly everyone as both a significant challenge and a golden opportunity. Freight vehicles were seen as significant contributors to air pollution and road danger. Workshop participants suggested retiming freight, consolidating deliveries into fewer vehicles and introducing freight restrictions during peak hours. These approaches were also raised by a number of survey respondents and Citizens Panel participants.

**Conclusion**

8. The first phase of engagement achieved a good level of public and other stakeholder engagement and reach. This has provided a good understanding of the concerns and priorities; which will inform the development of the Transport Strategy.
9. The feedback from the participants in the different engagement activities was consistent, suggesting workers and residents share concerns and priorities with City businesses and other interested bodies.
10. Further engagement will take place in June and July 2018, with consultation on the proposed vision, aims and outcomes. This will include a second meeting of the Citizens Panel.

**Appendices**

- Appendix 1 - City of London Transport Strategy: Phase one engagement report

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## **Appendix 1 - City of London Transport Strategy: Phase one engagement report**



# City Streets: Transport for a changing Square Mile

## City of London Transport Strategy Phase one engagement report

Strategic Transportation  
**Department of the Built Environment**

May 2018

## Introduction and key findings

The City of London is currently drafting its first long-term Transport Strategy. This will set the 25-year framework for future investment in, and management of, the Square Mile's streets. This report provides an overview of the results from the first phase of engagement activities that will inform the development of the Transport Strategy. This engagement sought the views of the public and organisations with an interest in transport in the Square Mile on the challenges and opportunities that will need to be addressed over the coming decades.

Engagement activities included an online survey, a series of stakeholder workshops, and an independently facilitated Citizens Panel. These activities took place throughout February and March 2018, and were supported by the *City Streets: Transport for changing Square Mile* exhibition at the City Centre. Over 2000 individuals who work in, live in, study in, and visit the City of London made their voices heard through these forums. The key themes emerging from their comments, suggestions, and ideas (ordered by the most common themes emerging from survey respondent comments) were:

### ***Key theme 1 – Traffic levels on City streets are too high***

Over 1400 (or four in five) survey respondents felt that motor traffic levels on City streets are too high. Instituting targeted or City-wide restrictions on motor vehicle traffic was the most commonly requested action from the *Improving the City's streets* question responses. Respondents felt that air pollution and the unpleasantness of motor vehicle-dominated spaces were the main problems caused by traffic. Fewer than 3% said that traffic was an issue because it delayed cars. Traffic levels were also raised as a concern at most workshops, with construction traffic and large numbers of private hire vehicles mentioned most often as causes of excessive vehicle numbers.

### ***Key theme 2 – Prioritising people walking***

Approximately 1500 (or three in four) respondents identified themselves as people who walk on City streets. A significant majority of survey respondents felt that not enough street space was allocated to people walking. Respondents clearly ranked pedestrians as the desired first priority users of City streets, with private motor vehicles ranking last. More space for people walking was the second most commonly requested action from the *Improving the City's streets* question responses. Space allocation was also a key theme emerging from all workshops, with many attendees suggesting that pavement space allocated to people walking is not sufficient given the number of people moving around the City on foot; especially at peak times and near stations. Safety of people walking was also a key concern for the Citizens Panel, with improved crossings and less traffic seen as key to reducing road danger for people walking. The Citizens Panel also commented on the need to better maintain pavements.

### ***Key theme 3 – Improved cycling infrastructure and safer cycling***

A majority of survey respondents felt that people cycling were under-prioritised and given too little space on City streets. Protected cycle lanes were the single largest street infrastructure improvement requested by survey respondents. Respondents also ranked cycle parking as the second desired priority of kerbside space usage. However, conflicts between people walking and cycling was also one of the top ten comment themes identified in the *Improving the City's streets* question responses. Safer cycling environments and other cycling infrastructure improvements were also commonly requested actions. Workshop and Citizens Panel participants also identified the challenges posed by conflicts between people walking and cycling, and many suggested further separation of these two modes, alongside separation of walking and cycling from motor vehicle traffic.

## Introduction and key findings

### ***Key theme 4 – Greenery, seating, and improving the public realm***

Greening the City was the largest non-transport mode specific request made by survey respondents and ranked sixth overall for most mentioned comment type from the *Improving the City's streets* question responses. Respondents ranked greenspace and seating as the first desired priority for kerbside space usage. Respondents also scored noise levels and the ease of finding seating the second and third lowest out of the 10 indicators of healthy, vibrant streets (only air quality scored poorer).

### ***Key theme 5 – City air pollution needs immediate improvement***

Survey respondents scored the quality of the City's air the lowest out of 10 indicators of healthy, vibrant streets. Improving air quality was the second largest non-mode specific request made by survey respondents. Air pollution was also the most common barrier to travelling to or around the City raised by disabled people. Both the stakeholder workshops and the Citizen Panel mentioned air quality as a key challenge the City needs to tackle immediately.

### ***Key theme 6 – Support for using streets more flexibly***

The opportunity of using streets more flexibly to accommodate the various demands on them at different times of the day was highlighted at most workshops. Specifically, timed restrictions on motor traffic was also requested by a number of survey respondents, particularly in relation to freight vehicles.

### ***Key theme 7 – improved accessibility on City streets***

Approximately 7% of survey respondents reported having an activity-limiting health problem or disability, with more than 100 of these individuals leaving comments on how to make the City a more accessible place, namely through reducing both air pollution and motor vehicle volumes. Citizen Panel and workshop participants also highlighted improving accessibility on City streets through minimizing pavement obstructions, introducing more drop kerbs, and through reducing motor vehicle dominance on City streets. Construction-related activities were also seen as a significant barrier to pedestrian accessibility.

### ***Key theme 8 – The need to improve the management of freight***

Despite the relatively low numbers in the City, freight traffic was seen by nearly everyone as both a significant challenge and a golden opportunity. Freight vehicles were seen as significant contributors to air pollution and road danger. Workshop participants suggested retiming freight, consolidating deliveries into fewer vehicles and introducing freight restrictions during peak hours. These approaches were also raised by a number of survey respondents and Citizens Panel participants.

# Contents

|     |  |           |
|-----|--|-----------|
| 1.  | City Streets survey results                              | <b>1</b>  |
| 1.1 | Survey introduction                                      | 2         |
| 1.2 | Demographic profile and travel behaviour                 | 3         |
| 1.3 | Healthy Streets Indicators and priority rankings         | 4         |
| 1.4 | Experience of the City's streets                         | 7         |
| 1.5 | Improving the City's streets open text response analysis | 11        |
| 2.  | Stakeholder workshop findings                            | <b>15</b> |
| 2.1 | Workshop introduction                                    | 16        |
| 2.2 | Workshop findings  | 17        |
| 2.3 | Workshop outcomes  | 21        |
| 3.  | Citizens Panel and drop-in session findings              | <b>22</b> |
| 4.  | Exhibition findings                                      | <b>24</b> |
| 5.  | Endnotes   | <b>26</b> |

**1**

# **City Streets survey results**

## 1.1 Survey introduction

This chapter provides an overview of the results from the City of London Corporation's *City Streets: Transport for a Changing Mile Survey* (the survey). This survey gathered public feedback on a number of City transport-related topics.

The survey was open to any individual that has recently travelled to or through the City and asked questions related to the City's street network, public realm, parking, and street cleansing, planning and management. The survey was launched on 2 February 2018 and was open for eight weeks. Respondents could fill in the survey online, in person at any *City Streets* event, or by mail-in paper copy.

This chapter is structured as follows:

- Sections 1.2 provides an overview of the survey respondent demographic profile and travel behaviours;
- Section 1.3 visualises the results of the Healthy Streets Indicators and priority ranking sections of the survey;
- Section 1.4 goes into further detail on traveller perceptions of City streets alongside mode-specific experiences; and
- Section 1.5 describes the response results of the survey's *Improving the City's streets* open text survey question.

### **Data protection and use**

The City is a registered data controller in respect of processing personal data under the relevant data protection legislation. This includes the Data Protection Act 1998, Data protection Act 2018 and the General Data Protection Regulation (GDPR). Further relevant details are presented below.

*Any personal data provided by respondents, for the purposes of this survey, has been done so in accordance with the requirements of the EU-U.S. Privacy Shield. The personal data processed by the City, and by the processor, for the purposes of this Survey, has been done so on the legal basis of respondents' consent.*

*Any respondent who took part in this survey has the right to request a copy of their data, ask us to make changes to ensure that their data is up to date, ask that the City deletes their information or object to the way we use their data. To do this please write to Data Protection Officer, City of London, PO Box 270, Guildhall, London, EC2P 2EJ or email [information.officer@cityoflondon.gov.uk](mailto:information.officer@cityoflondon.gov.uk).*

*Readers may reproduce any figure in this report with reference to the Strategic Transportation Team, Department of the Build Environment, City of London Corporation. If you have any questions regarding the contents of this report, please contact [strategic.transportation@cityoflondon.gov.uk](mailto:strategic.transportation@cityoflondon.gov.uk).*

## 1.2 Demographic profile and travel behaviours

### Respondent profile

The survey respondent profile is presented in the two figures on this page. For figures 1.2.1 and 1.2.2 it is important to note that percentages do not add up to 100% as respondents could select multiple options for each related question. In total, 1949 people accessed the survey of which 85% continued the survey to completion. The overall male/female breakdown was approximately 65/30 (with 5% choosing other options), this broadly aligns with the [gender split of the City's working population](#)<sup>1</sup>.

Figure 1.2.2 (below) shows the percentages of respondents that said they used each mode to commute to work (in yellow) and to travel around the City (in green). These values are compared against the [London Travel Demand Survey](#)<sup>2</sup> (LTDS), results for the City of London (grey line). While this visualisation does not allow one to compare “like for like” (as the response profile from the City does not add up to 100% like the LTDS does) it does provide some context to assess the representativeness of the Survey sample.

This comparison suggests that relatively more people who travel by cycle, bus, taxi and car responded to the survey than travel to the City by those modes (according to the LTDS). This could be as a result of these user groups being more ‘vocal’ than others, the inclusion of individuals that only travel through the City (the LTDS only represents City-bound traffic), and that three in four respondent selected more than one mode of travel.

Figure 1.2.1 Multi-select responses on reasons respondents travelled to/through the City

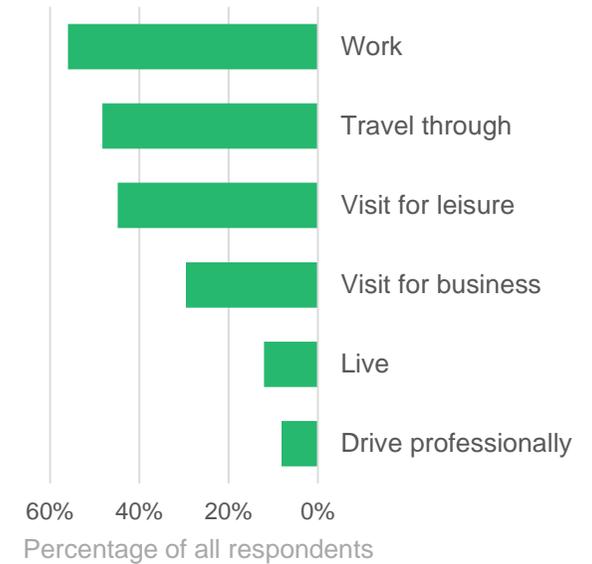
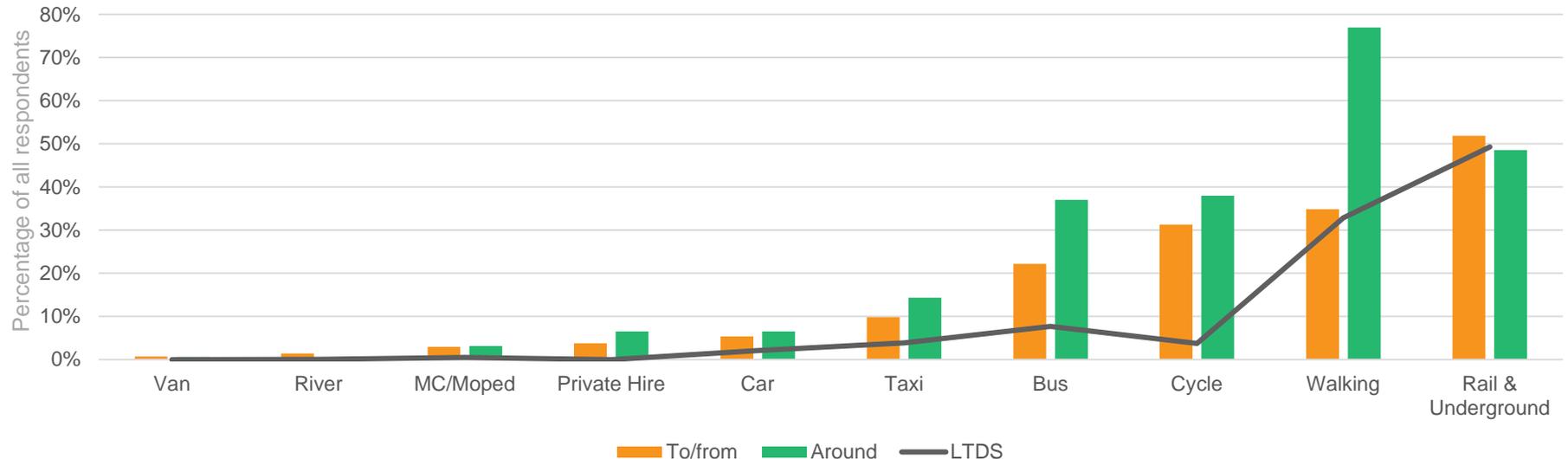


Figure 1.2.2 Comparison of multi-select responses to modes used to commute to/from and around the city and LTDS City-destination mode share data



### 1.3 Healthy Streets indicators and priority rankings

#### Priority rankings

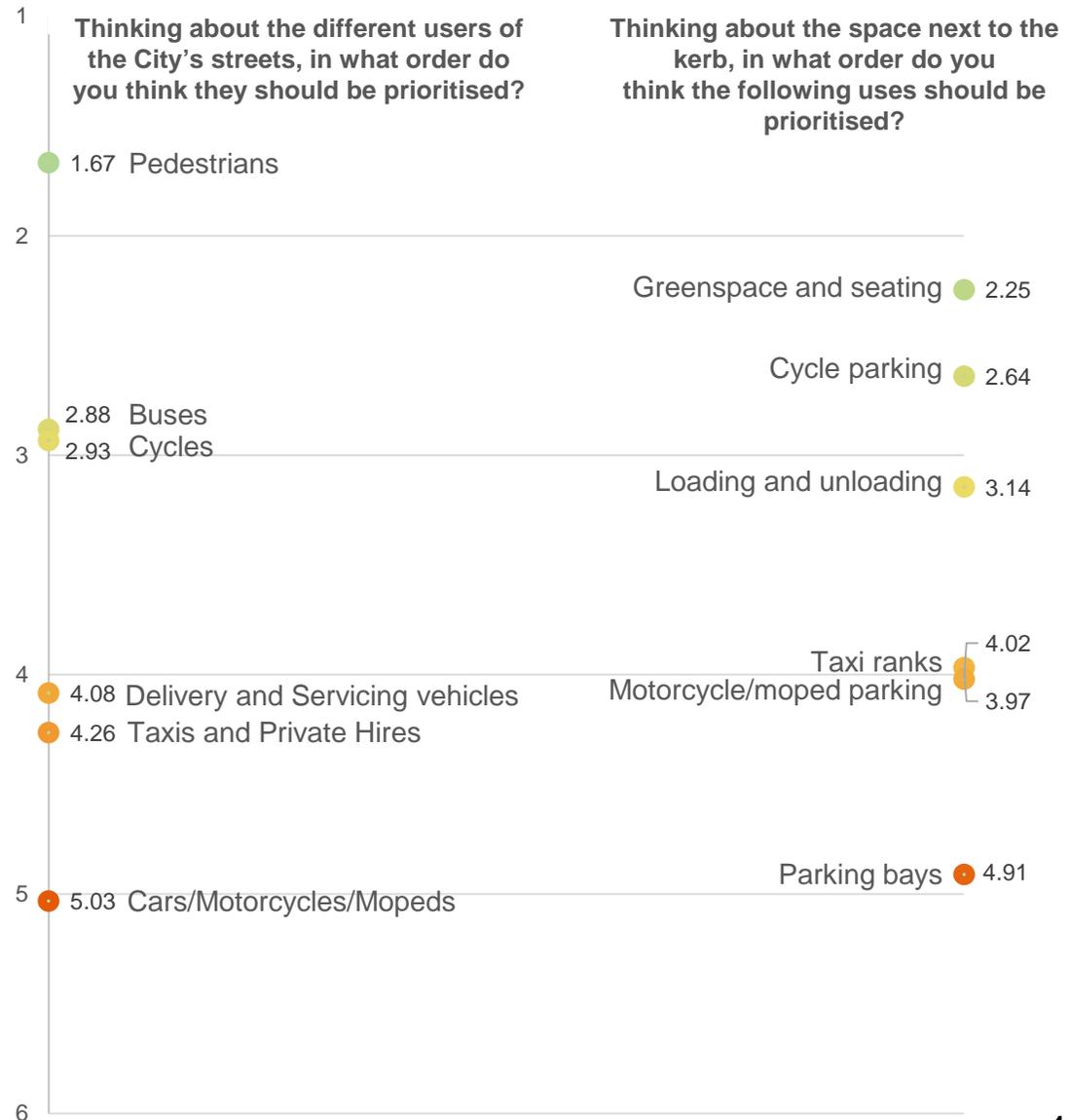
Figure 1.3.1 visualises the results of the two ranking questions posed by the survey. In the first question respondents were asked to rank the six different user groups of the City’s streets by desired priority. In the second question respondents were asked to rank the six different use groups of kerb-side space by desired priority.

The results of these ranking questions has been derived by calculating weighted ranking averages for each use/user group. These weighted averages have been visualised on a number line to give a sense of the significance of each ranking. For instance, “pedestrians” ranked as the top user group of the City’s streets by a clear margin (weighted average of 1.67), whereas “buses” and “cycles” rank nearly the same at second and third priority respectively (weighted averages of 2.88 and 2.93 respectively). Thus, the space between options shows how the options rank against each other. A simplified ranking is also presented in Figure 1.3.2 (below).

**Figure 1.3.2 Overall street user and use group priorities**

| Priority | User Group                      | Use Group                |
|----------|---------------------------------|--------------------------|
| 1        | Pedestrians                     | Greenspace and seating   |
| 2        | Buses                           | Cycle parking            |
| 3        | Cyclists                        | Loading and unloading    |
| 4        | Delivery and servicing vehicles | Taxi ranks               |
| 5        | Taxi and Private hire           | Motorcycle/moped parking |
| 6        | Cars/Motorcycles/Moped          | Parking bays             |

**Figure 1.3.1 Survey ranking questions (question text below) and weighted rankings**



## 1.3 Healthy Streets Indicators and priority rankings

### Healthy Streets Indicator scores

Respondents were asked to score their general experience of the City's streets against a number of indicators on a scale of 1 to 5. These indicators (listed below in Figure 1.3.4) broadly aligned to the Healthy Streets Indicators (Figure 1.3.3, right) used by Transport for London (TfL) to assess the 'healthiness' of streets and roads across London. The ten evidence-based indicators used in the TfL [Healthy Streets Approach](#)<sup>3</sup> highlight what make streets attractive places to walk, cycle and spend time.

The results of the survey indicator scoring questions are shown on the following page in Figure 1.3.5. The weighted average of all ten scoring questions is also shown on the graph and compared to the London-wide Healthy Streets average from a [TfL study](#)<sup>4</sup> of 80 streets and roads across Greater London. The City Streets average is significantly lower than that of streets and roads across London (although this can partly be explained by methodological differences in data collection and analysis).

Overall, the Square Mile's streets scored relatively poorly in all areas except personal safety from crime and anti-social behaviour. All public realm and environment indicators scored very low. The 'cleanness' of City's air ranked below a score of 2 with 43 percent of respondents giving the lowest possible score. Indicators on availability of seating, shade and shelter, and noise levels also scored below average.

Figure 1.3.3 Healthy Streets Indicators  
(Source: Lucy Saunders)



Figure 1.3.4 Survey questions and related Healthy Streets Indicator

| City Streets Survey Question   | Healthy Streets Indicator            |
|--|--------------------------------------|
| How clean do you think the air is?   | Clean Air                            |
| How intimidated do you feel by motor traffic?  | People feel relaxed/People feel safe |
| How intimidated do you feel by cyclists?   | People feel relaxed/People feel safe |
| How safe from crime and anti-social behaviour do you feel?                               | People feel safe                     |
| How noisy do you find the streets?   | Not too noisy                        |
| How easy do you find the streets to cross?   | Easy to cross                        |
| How easy do you think it is to find shelter, for example if it was sunny or raining?     | Shade and shelter                    |
| How easy would it be to find somewhere to sit or rest if you needed to?                  | Places to stop and rest              |
| How enjoyable do you find being on City streets?   | Things to do and see                 |
| How accessible do you think the City's streets are for people of all ages and abilities? | Pedestrians from all walks of life   |

### 1.3 Healthy Streets indicators and priority rankings

Figure 1.3.5 Comparison of Healthy Streets indicator question scores



## 1.4 Experiences of the City's streets

### Traffic volumes and issues arising from traffic

Respondents were asked whether traffic levels in the City were too high. More than 1400 respondents (or four in five) answered “yes”, with two in five respondents stating that traffic levels were too high “all day”. Figure 1.4.1 (right) and 1.4.2 (below) show the results of subsequent questions on which vehicle volumes were too high and what issues resulted from traffic levels being too high in the City. It is important to note that percentages do not add up to 100% as respondents could select multiple options for each question.

Overall, private car, lorry, van, private hire and, to a lesser extent, taxi volumes were considered to be too high by a significant proportion of respondents. Thus, respondents thought the volumes of the majority of motor vehicle modes in the City are too high. The main traffic-dependent issues respondents identified in the survey were related to air pollution, the pleasantness of the street environment, and the feeling of being in a space dominated by motor vehicles. Delays to vehicular traffic were the least important reasons according to respondents. These findings suggest that the healthiness of a street, both physically and psychologically, are the main reasons why people perceive high motor traffic volumes to be an issue in the City.

Figure 1.4.1 Multi-select responses on vehicular modes whose traffic volumes are “too high”

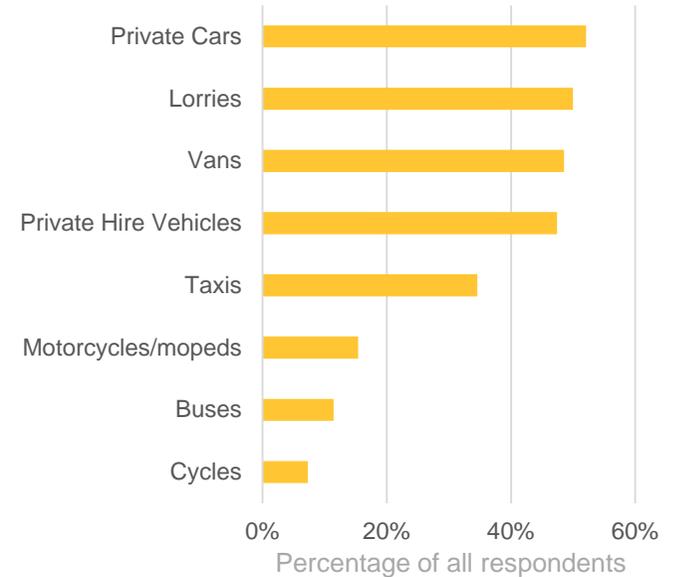
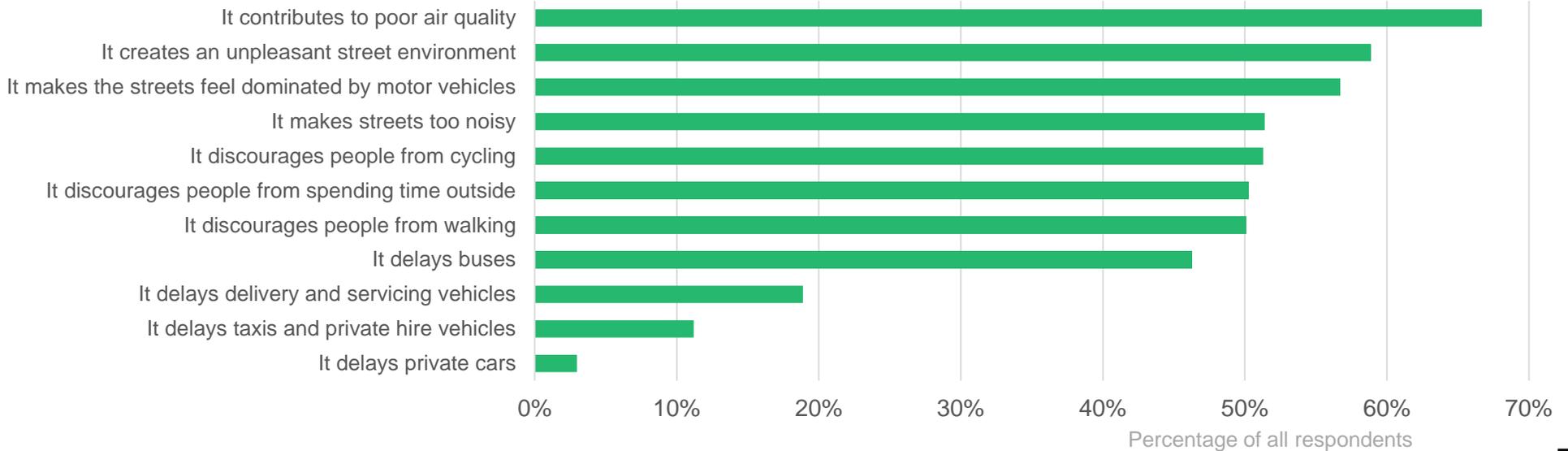


Figure 1.4.2 Multi-select responses on reasons why the amount of traffic in the City is an issue



## 1.4 Experiences of the City's streets

### *The experience of walking in the City*

The results of a series of questions on the experience of and conditions for walking on the City's streets are shown in Figure 1.4.4 (bottom). Overall, nearly all walking experience indicators scored poorly, with a significant proportion of respondents finding themselves under-prioritised on too little street space, waiting too long to cross and given too little time to cross. Nearly a quarter of respondents found walking in the City "unpleasant" while 80% found pavements to be overcrowded at some point in the day, highlighting the opportunity for improved walking infrastructure and increasing pavement space and priority.

Those respondents who found that pavements were overcrowded at some point in the day overwhelmingly felt that the peak hours were the most congested times (Figure 1.4.3, right). Nearly 1 in 5 respondents felt that pavements were crowded all day.

Figure 1.4.3 Multi-select responses on when City pavements are overcrowded

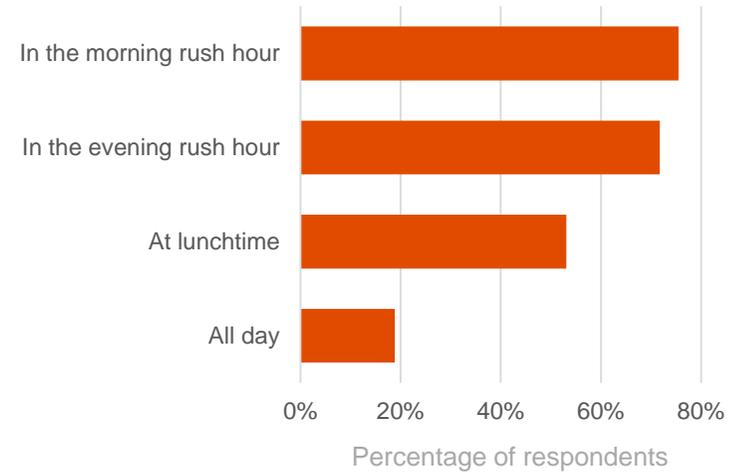
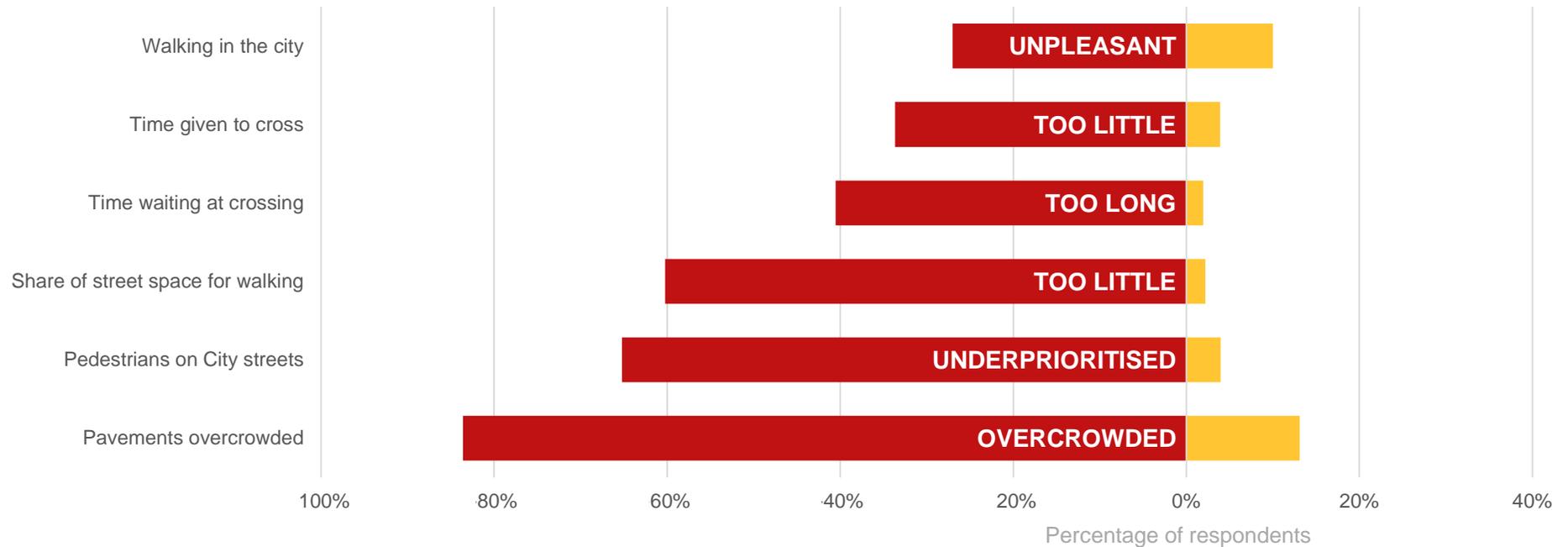


Figure 1.4.4 Responses to walking experience indicator questions



## 1.4 Experiences of the City's streets

### The experience of cycling in the City

The results of two survey questions on the priority and space given to people cycling are shown in Figure 1.4.6 (below), broken down by respondent mode of travel around the City. Overall 3 in 5 respondents thought that people cycling were under-prioritised on the City's streets and a similar proportion found that people cycling were given too little share of street space. Over half of respondents who cycle in the City also found the cycling experience in the City "unpleasant". While overlaps exist between each individual mode (e.g. a person who cycles that also uses taxis), the findings suggests that respondents who travel by private motorised vehicular modes are less likely to believe that people cycling are under-prioritised and more likely to think people cycling are given too much space.

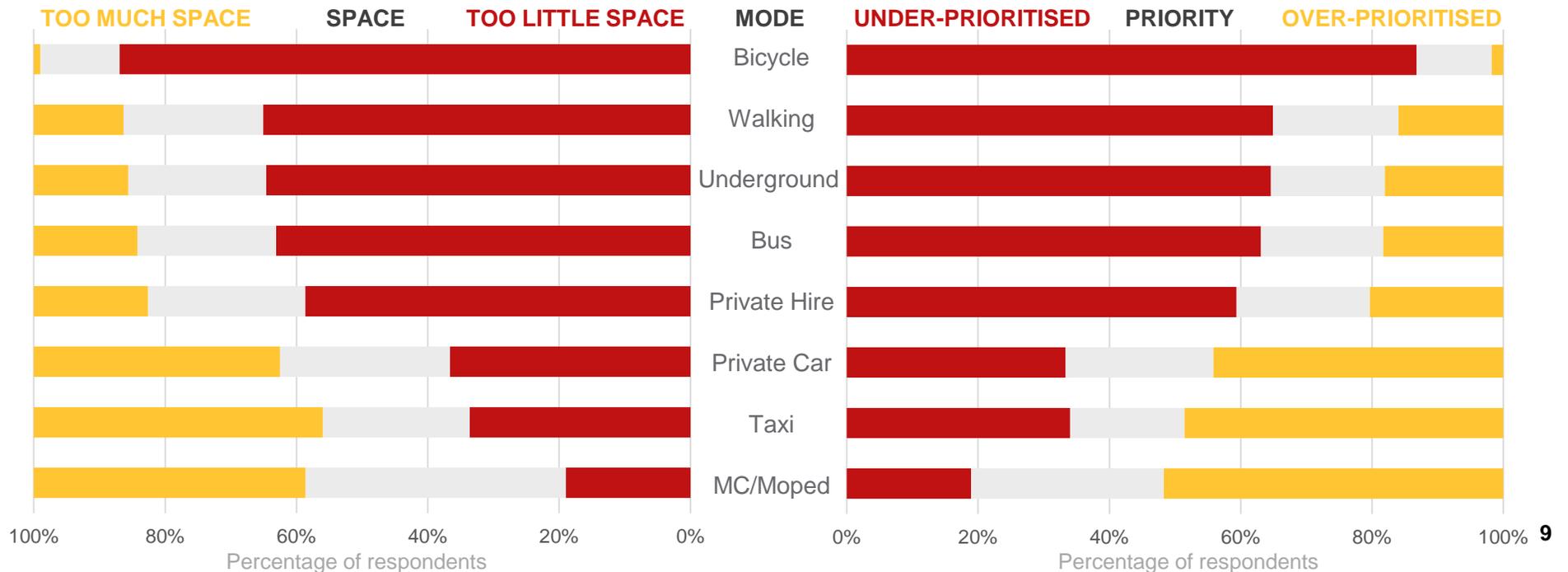
Figure 1.4.5 (right) shows the results of asking respondents how safe they feel/perceive cycling is on City streets. Just over half of all respondents gave a score of 1 ("least safe") or 2, suggesting that a significant number of respondents do not feel safe cycling.

Figure 1.4.5 Responses to the perceived safety of cycling in the City



Proportion of all respondents

Figure 1.4.6 Responses to the overall space and priority given to cyclists on City streets broken down by mode choice of respondent



## 1.4 Experiences of the City's streets

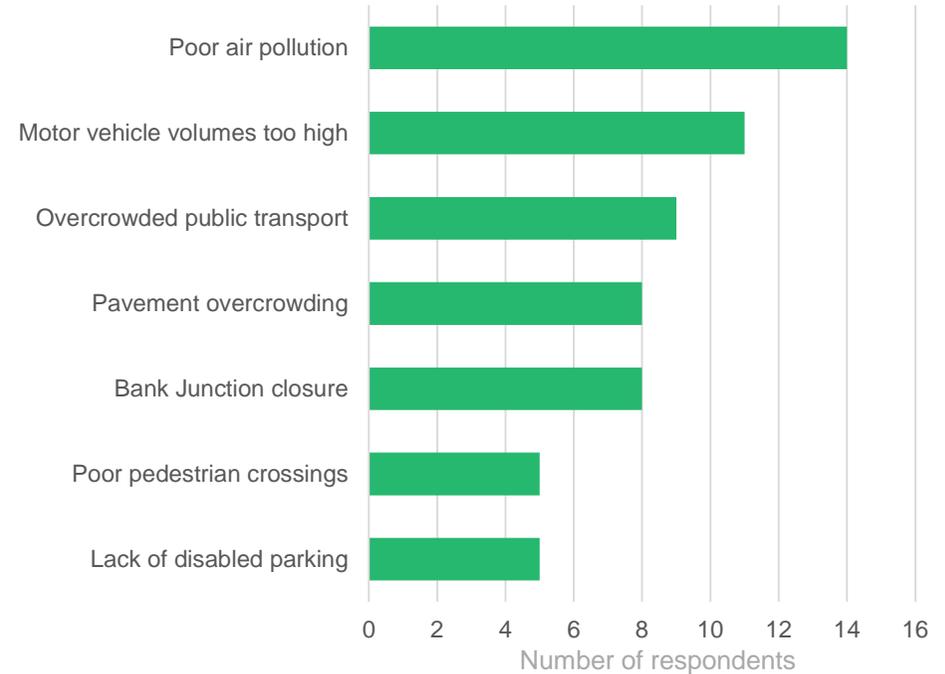
### ***The experience of travelling for people whose day-to-day activities are limited***

The survey also asked respondents whether their day-to-day activities were limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months. In total, just over 110 people responded as having their mobility limited in some way. Approximately 7% of respondents answered “yes” with 1.4% of respondents answering “yes, limited a lot” and 5.7% of respondents answering “Yes, limited a little”.

These respondents were also asked how easy it was to travel to/from the City and around the City on a scale of 1 (least easy) to 5 (most easy). The weighted averages for these questions were 2.95 and 2.8 respectively, suggesting it is slightly easier to get to/from the City than around the City for those with health problems or disabilities.

Respondents were also asked what barriers they encountered when travelling to/from and around the City. Responses were coded for the themes discussed (full methodology described in Chapter 1.5). All themes identified by five or more respondents are shown in Figure 1.4.7 (right). These results suggest that the key barriers for these respondents were associated with air pollution, high levels of motor vehicles and overcrowding on public transport.

Figure 1.4.7 Open text response analysis to what barriers disabled people face travelling around the City



## 1.5 Improving the City's streets – open text response analysis

### Overview and methodology

The survey asked respondents 'If you could change one thing to improve your experience on the City's streets, what would it be?' The question was optional and left 'open' for respondents to fill in themselves. Three quarters of respondents (1,434 people) answered the question.

A significant variety of responses was received. Each response was reviewed and analysed by categorising the subject of each comment into 'sub-topics'. Some respondents provided more than one change/proposal and/or expressed a concern or support for a specific subject, location or scheme. Only the first three changes or issues a respondent mentioned were reviewed and categorised into sub-topics to prevent those respondents who provided significantly longer responses from skewing analysis results. As such, there are more changes/proposals than the number of respondents who answered the question. Other comments, concerns and support that did not directly answer the question were also reviewed and noted when relevant.

Response text analysis began by categorising each statement into one of 50 detailed sub-topics. The sub-topics were created by taking a sample of 400 responses and identifying the 50 most common changes that were proposed. Additional sub-topics were then created where necessary as analysis continued. Finally, a full review at the end of the categorisation was undertaken to ensure all comments fitted in to the most appropriate sub-topic. Any sub-topic with fewer than five responses attributed to it was removed from the final categorisation. The sentiment of the sub-topic was also noted (i.e. whether the respondent was in support of or against the sub-topic).

Once all comments were categorised, sub-topics were then grouped into similar 'themes'. A theme consisted of a higher-level categorisation of related sub-topics. A sample of comments and their associated sub-topic and theme are shown in Figure 1.5.1 (right).

Figure 1.5.1 A sample of comments and associated sub-topic and theme

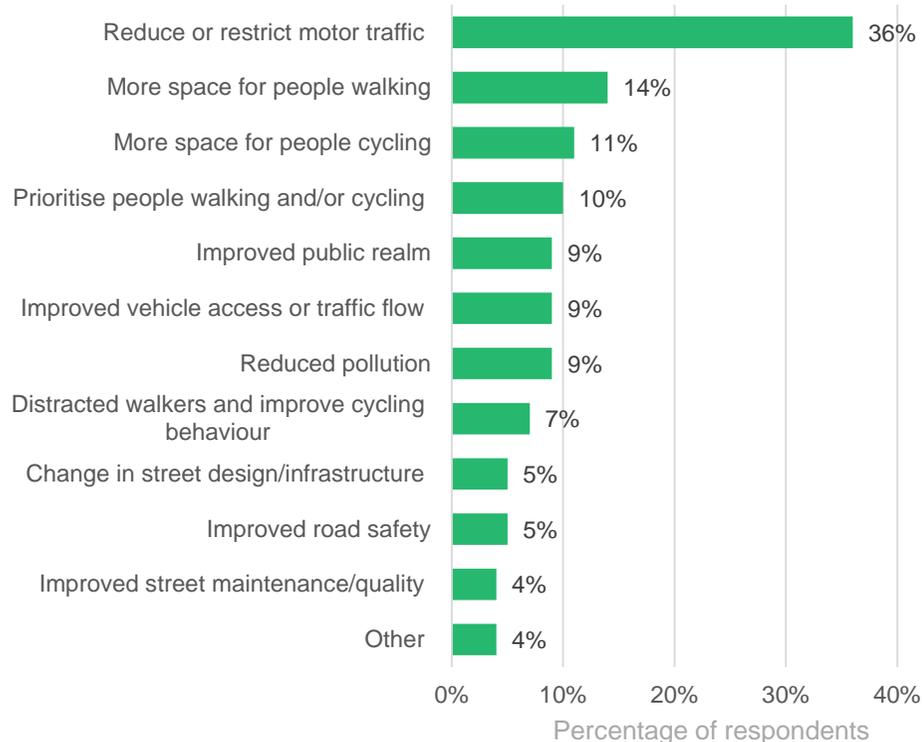
|   |  |
|---|--|
| <b>Comment:</b><br><i>'More motor traffic free streets'</i>     |  |
| <b>Theme:</b><br><i>Reduce or restrict motor vehicles</i>       | <b>Sub-topic:</b><br><i>Targeted motor vehicle ban</i>   |
| <b>Comment:</b><br><i>'Widen footway'</i>                       |  |
| <b>Theme:</b><br><i>More space for people walking</i>           | <b>Sub-topic:</b><br><i>Wider pavements</i>              |
| <b>Comment:</b><br><i>'Greater priority to vehicles'</i>        |  |
| <b>Theme:</b><br><i>Improved vehicle access or traffic flow</i> | <b>Sub-topic:</b><br><i>Motor vehicle prioritisation</i> |
| <b>Comment:</b><br><i>'Clean air'</i>                           |  |
| <b>Theme:</b><br><i>Reduce pollution</i>                        | <b>Sub-topic:</b><br><i>Reduction in air pollution</i>   |

## 1.5 Improving the City's streets – open text response analysis

### Themes

The themes of the proposals stated by respondents are listed below in Figure 1.5.2 and are ranked in order of the most to least mentioned. It is important to note that percentages do not add up to 100% as responses from each respondent could contain up to three themes. Distinct themes emerged around motor traffic levels; space allocation/prioritisation of people walking and cycling; improvements to street maintenance and design; road safety; public realm; pollution; vehicle access; walking and cycling behaviour; and improvements in noise and air quality. Proposals to restrict or reduce motor traffic was the most frequent theme with over a third of all respondents proposing a motor vehicle volume reduction, cap, or targeted or city-wide ban.

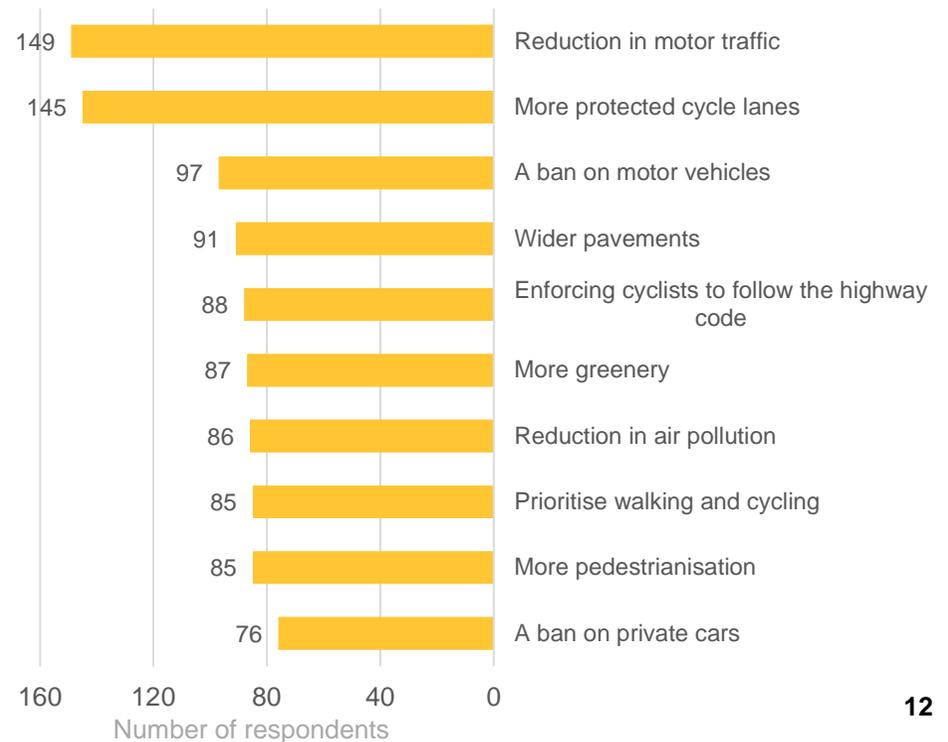
Figure 1.5.2 Themes to change one thing on the City's streets



### Sub-topics

Each theme groups together similar sub-topics. The sub-topics provide more detail on specific changes or proposals made by respondents. The list of sub-topics contained in each theme are summarised on the following page and the ten most frequently mentioned changes respondents would like to see on City streets are shown below in Figure 1.5.3.

Figure 1.5.3 Top ten specific proposals (sub-topics) mentioned



## 1.5 Improving the City's streets – open text response analysis

### **Overview of themes and sub-topics**

A summary of the most common themes alongside the sub-topics that comprise them is presented below.

#### *Reduce or restrict motor traffic*

As mentioned previously, this theme included any proposal associated with a reduction, restriction, ban or cap on motor traffic, either all motor traffic or a specific type. Further analysis of the sub-topics of this theme are explored in subsequent pages.

#### *More space for people walking*

The most common proposal was to widen footways followed by more pedestrianisation. Avoiding narrowing pavements for construction works and roadworks was also mentioned.

#### *Improved public realm*

Several proposals were made for improved public realm, the most common being more greenery, then decluttering of pavements, then more seating.

#### *More space for people cycling*

This theme included mostly more protected cycle lanes and more street space for cycling.

#### *Improved vehicle access or traffic flow*

The proposals varied in this theme from change the Bank on Safety scheme to allow taxis through (most common) to the removal of protected cycle lanes.

#### *Prioritise people walking and/or cycling*

This theme was mostly made up of proposals to prioritise both walking and cycling, followed by proposals to prioritise people walking.

#### *Reduce pollution (air and noise)*

This theme mostly consisted of proposals to reduce air pollution, but also included reductions in noise pollution.

#### *Distracted walkers and improve cycling behaviour*

This theme consisted mainly of enforcing poor behaviour of people who cycle (e.g. not to use the pavement, obey red traffic lights) and the remainder were associated with people distracted by their mobile phones while walking.

#### *Improved road safety*

Proposals were mainly to reduce conflicts between people walking and cycling (mostly through shared space areas), and the remainder to create a safer cycling environment.

#### *Change in street design/infrastructure*

This theme mostly consisted of proposals to improve pedestrian crossings, and the remainder were to convert cycle lanes to be timed, remove contra flow cycle lanes and change signal timings.

#### *Improved street maintenance/quality*

This theme contained proposals related to reducing or better co-ordinating roadworks, have less litter on the street, improve pavement quality or reduce the number of potholes.

#### *Other*

This category included more bus provision, less bus provision, more bus lanes and better wayfinding.

## 1.5 Improving the City's streets – open text response analysis

### Motor vehicle restriction theme analysis

Reducing or restricting motor traffic was the most common proposal, with over 500 respondents mentioning it in their *Improving the City's streets* responses. Within this theme there were specific proposals to ban, restrict or reduce the level of motor traffic in general or of a specific type. Further analysis on these comments was undertaken to understand to what extent respondents wanted a reduction in motor traffic levels.

Nearly half of all proposals to reduce or restrict motor traffic were related to all motor vehicles irrespective of type (Figure 1.5.6, below). Of these, most were associated with a reduction in motor vehicle volumes, a fifth to ban traffic City-wide, and the remainder to ban motor traffic on some streets or part of the City, or during certain times of the day.

The remaining proposals associated with a reduction or restriction of traffic were associated with a specific mode (Figure 1.5.5, right). Again, the most common proposals were to reduce volumes or introduce a City-wide ban, with private cars being the most common specific mode mentioned. Proposals around private hire vehicles and taxis also include a cap on vehicle numbers, while more proposals around a timed ban (outside of peak hours) were mentioned for freight vehicles than any other mode.

Figure 1.5.5 Types of restrictions and reductions of specific modes

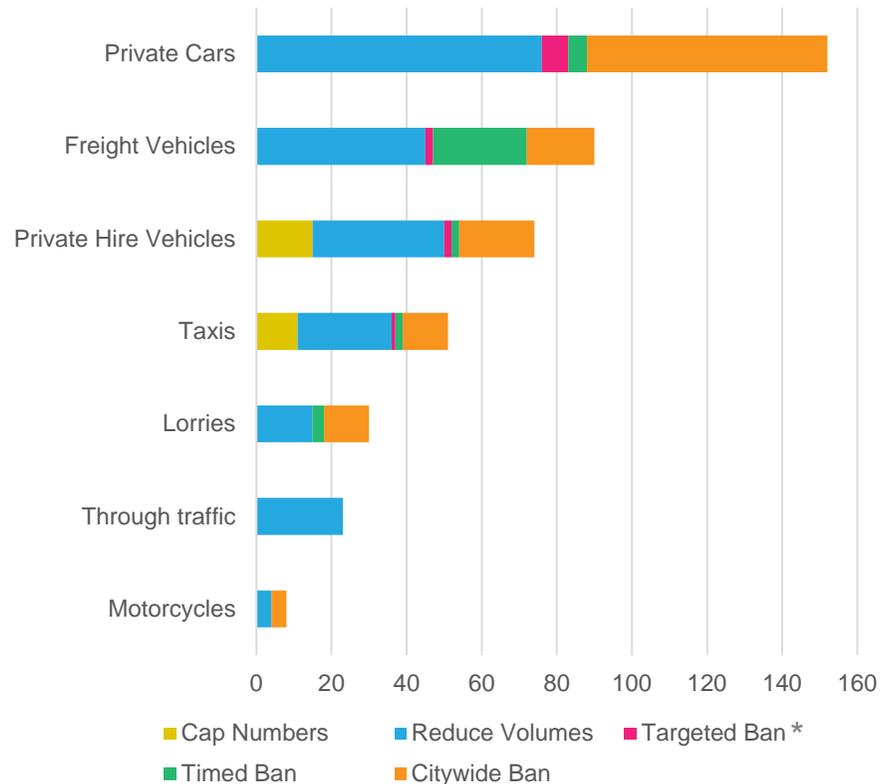
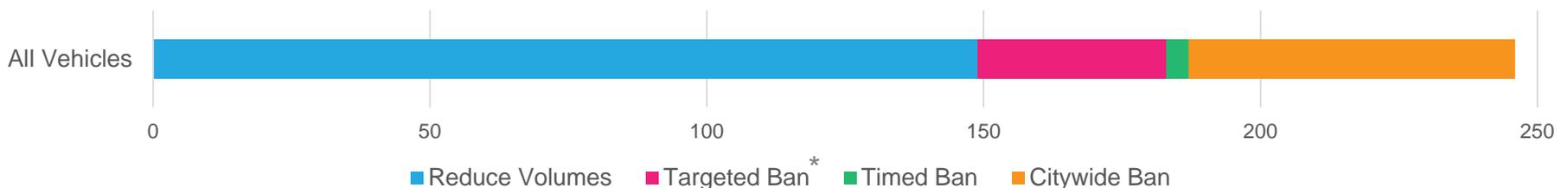


Figure 1.5.6 Types of restrictions and reductions of all motor traffic proposals



\*A specified location or 'some/more/most streets or areas'

**2**

## **Stakeholder engagement workshop findings**

## 2.1 Stakeholder engagement workshops – introduction

### **Workshop format**

Seventy seven representatives from City businesses, transport user groups and other organisations with an interest in transport in the Square Mile attended workshops to share their views on transport challenges and opportunities. A list of organisations represented at the workshops is shown below in Figure 2.1.1.

Attendees were presented with a high-level overview of transport in the Square Mile prior to the collaborative portion of the workshop. The presentation was followed up by facilitated discussions on transport challenges and opportunities, and measures of success. The key themes discussed at the workshops are summarised on the following pages.

**Figure 2.1.1 List of organisations that attended workshops**

|                                    |                                       |  |
|------------------------------------|---------------------------------------|--|
| Age UK                             | Future City Logistics                 | Recharge Cargo                                     |
| Arup                               | Gnewt Cargo                           | Steer Davies Gleave                                |
| Bearing Point                      | Greater London Forum for Older People | Staples  |
| Black Rock                         | Landsec                               | Sustrans   |
| British Motorcycle Federation      | Living Streets                        | Thames Clippers                                    |
| Broadgate Estates                  | London Borough of Hackney             | The Alliance of British Drivers                    |
| Brookfield                         | London Borough of Lambeth             | The Ned  |
| C2C                                | London Cab Drivers Club               | The Ramblers                                       |
| CBRE                               | London Cycling Campaign               | The Worshipful Company of Chartered Architects     |
| Centre for Accessible Environments | London Fire Brigade                   | The Worshipful Company of Hackney Carriage Drivers |
| CEVA                               | London Taxi Drivers Association       | Transport for London                               |
| City of London Access Group        | London Tourist Coach Association      | Unite  |
| City of London School              | London Travel Watch                   | UPS  |
| City of Westminster                | Lloyd's                               | Wilson James                                       |
| Cross River Partnership            | Momentum Transport Consultancy        | WYG  |
| Deutsche Bank                      | Motorcycle Action Group               |  |
| Doddle                             | Port of London Authority              |  |
| E Cargo Bikes                      | Publica                               |  |
| Fieldfisher                        | Railwatch                             |  |

## 2.2 Stakeholder engagement workshop findings – challenges and opportunities

### *Street space allocation*

Many attendees suggested that the **pavement space allocated to people walking is not sufficient** for the numbers of people moving around the City, especially at peak times and near stations.

**Construction and building work were mentioned as a source of frustration for people on foot**, creating pinch points that may force people to step off the pavement.

Several participants felt that a **flexible or intelligent use of streets will be the only way to respond to demands being placed on limited street space**. Particularly the timed use of streets – for example making some streets pedestrian-only at peak times.

Some participants felt that **greater separation of modes is required** – particularly dedicated space for cycling and buses. Others noted that protected cycle lanes are not always well used for much of the day.

**Competition for kerbside space** was highlighted as a challenge, particularly by freight industry representatives who noted the need to provide convenient loading facilities.

A number of participants felt that **space should be re-allocated from car parking to public spaces**.

Representatives from motorcycle groups highlighted that **motorcycle parking on City streets is oversubscribed** and needs to be secure.

The tourist coach industry noted that **a key challenge for coaches is finding space to pick up and set down near key attractions**, as well as space for coaches to wait.

Taxi industry representatives noted the **demand for taxi ranks** – especially at stations – with the ranks needing to be accessible. Ranks were considered to be better for drivers and passengers, avoiding the need to drive around empty, contributing to pollution.

TfL Buses representatives noted the **success of the Bank on Safety scheme in reducing journey times for buses**. They also raised concerns that too many restrictions on motor traffic may impact on bus movements and emphasised the difficulty of changing bus routes.

It was suggested that **street clutter – such as signage – should be minimised** to make the most of the available space.

Several people suggested **making better use of the City's network of alleyways and smaller streets for walking** – helping people avoid walking along heavily trafficked streets.

## 2.2 Stakeholder engagement workshop findings – challenges and opportunities

### **Traffic levels**

Most workshop attendees agreed that **traffic should be reduced**, however no single proposal or opportunity emerged as the most popular.

Professional drivers, such as taxi and freight companies, and several City businesses raised the challenges of **long or unreliable journey times**.

The taxi trade noted that **the unreliability of journey times made it difficult for taxi drivers to estimate the cost of trips**, and that costs are passed on to the passenger.

Workshop attendees cited a few common factors that they felt contributed to traffic levels and delays, with **construction traffic and large numbers of private hire vehicles (PHV) mentioned most often as causes**.

**Reduced capacity for motor vehicles following the introduction of Cycle Superhighways** was noted by some attendees as another cause of delays, particularly on Upper Thames Street and Lower Thames Street.

The **number of buses moving around the City was mentioned by some as a source of traffic delays** – several noted that bus occupancy was low outside the morning and evening peak.

**Several forms of traffic reduction technique were discussed**, including local or City-wide motor vehicle bans, confining motor traffic to key corridors, using modal filters to discourage or prevent through traffic, and targeted measures aimed at reducing particular types of vehicle, for example PHVs.

### **Road danger**

**The safety of people moving around the City** was mentioned as a challenge at most of the workshops. Often this was mentioned in combination with the challenge of how street space is allocated, with many people saying that pavement overcrowding means that people walking are forced to step into the carriageway – conflicting with motor traffic and people on bikes.

It was suggested by some attendees that **people on foot being distracted by mobile phones is an increasing problem** in the City.

Several people mentioned **poor behaviour of people cycling** as a challenge – with high cycling speeds, disobeying of traffic signals and conflict with people walking cited most often.

Freight industry representatives highlighted **the safety challenge of people on foot sharing space with goods vehicles**.

Some representatives of City businesses noted **the security of streets** as a challenge, with a need for measures to be taken to mitigate the threat from hostile vehicles.

Attendees from neighbouring boroughs acknowledged that the Mayor of London's **'Vision Zero' target to eliminate death and serious injury on London's streets by 2041 is a huge challenge**, with no easy way to achieve this and the need for a fundamental shift in how streets operate.

**Opportunities to improve the safety of City streets were closely linked to other opportunities**, rather than being specifically identified as safety interventions. Opportunities aimed at reducing traffic more generally, and for making freight more efficient would also reduce instances of conflict between people walking and cycling and other motor traffic.

## 2.2 Stakeholder engagement workshop findings – challenges and opportunities

### *Air quality*

**Air quality was mentioned as a key challenge** by several stakeholders, with some mentioning empty buses, ‘circulating’ PHVs and freight vehicles as sources of air pollution.

### *Deliveries and servicing*

**Opportunities to more effectively manage freight movements** were discussed by all the workshops as ways of reducing traffic, improving safety, and addressing poor air quality.

Several stakeholders, including the freight industry, considered **freight consolidation** to be part of the solution. However, freight and City business representatives highlighted the limits of physical consolidation, in particular the potential additional cost of double-handling goods and distribution centres outside the City.

One freight industry representative suggested that most **consolidation should be done through the procurement process**, with physical consolidation centres used only where the supply chain cannot efficiently consolidate deliveries.

Some people suggested that **the City Corporation has a role in facilitating consolidation**, particularly for smaller businesses.

Borough representatives suggested that **consolidation targets could be a requirement of each Local Authority’s Local Plan** – in the way that Housing targets currently exist.

**Micro-consolidation within the Square Mile** was mentioned as part of the solution for last mile deliveries.

**Re-timing freight movements** was discussed in most workshops as a way of improving streets. As with consolidation, most people acknowledged that re-timing is part of the solution but does not work for all deliveries, particularly those to small businesses.

The freight industry and some City businesses mentioned **the challenges of retiming** some delivery trips to reduce daytime traffic – particularly where there are planning restrictions on delivering to premises overnight.

Several freight industry representatives said that **delivering overnight, when traffic is lighter, is helpful for hauliers**, as personnel and vehicles can work more efficiently – reducing costs.

**Making greater use of the river for freight transport** was mentioned by several people, often in conjunction with efficient last-mile delivery using electric vehicles or cargo bikes. It was noted that river transport for goods is not generally commercially viable and is not as flexible as road transport.

Some City businesses suggested that **the City Corporation should be stronger in requiring certain behaviours from occupiers** in the City – setting firm conditions on how deliveries should be carried out in the City.

## 2.2 Stakeholder engagement workshop findings – challenges and opportunities

### ***Growth and the 24/7 City***

**The growing City** was seen by several participants as a significant challenge for the future, with more people – particularly on foot – using an already busy street network.

**The increase in people walking and spending time near new Crossrail stations** was highlighted as a particular challenge.

It was noted that technology is enabling **changing working patterns**, with more sectors able and willing to work remotely or flexibly.

Many people suggested that **the City Corporation should encourage leisure activities in the City** during the evenings and weekends, with all-weekend operation of the Waterloo and City line suggested by one person.

Some stakeholders mentioned **the challenge of embracing a 24/7 City** and suggested that this may not be desirable, with a quieter City at the weekends being good for residents.

**Use of the quieter City at the weekend** was raised by some people as an opportunity for freight movements, in particular for construction sites where large vehicles are required to service building activities.

### ***New and emerging technologies***

New and emerging technologies – particularly **automated vehicles and drones** – were mentioned by many as a challenge and opportunity.

Most agreed that significant technological change would happen in the near future, but there was **no consensus on how the technology should be used**. Some people felt that drone technology offered opportunities – particularly for deliveries – but others felt that automated vehicles were a threat to the City environment and could be a nuisance.

Boroughs raised the fact that **TfL and Central Government appear to be relatively far behind the market** – creating a potential regulatory and policy gap.

The taxi trade noted **the need for a good electric vehicle-charging network** to improve air quality.

## 2.3 Stakeholder engagement workshop – successful outcomes

Many people expect a successful transport strategy to provide **more space for people walking** on City streets, especially at peak times, and streets would be uncluttered.

Some stakeholders noted that the **space should be flexible**. Emergency service representatives said that even pedestrianised space must be **accessible to large emergency vehicles when required**.

**Streets must be accessible** to all users, regardless of age and ability.

Some stakeholders mentioned the need to **maintain the City's 'buzz'** as part of its appeal for investors and workers.

Many people expect to see **a greater proportion of electric vehicles on the City's streets**, and most see some role for electric vehicles in the long term. The move to electric vehicles, particularly taxis, was widely expected to contribute to cleaner air in the City in the future.

Several people highlighted the desire for **a greener environment** as part of a future City streetscape – with a few pointing out that the City has a lot of biodiversity which should be enhanced and enjoyed.

Some people expect that working habits will change in the future, and the traditional **commuter peaks of demand in the morning and evening will reduce**, even with an increase in the City's working population. Others see the desire to work in the City as enduring, evidenced by the high demand for office space in the Square Mile.

Most workshop attendees see **reduced traffic as a desirable outcome**, with several suggestions on how this may be achieved. Most people believed that vehicle access to most streets will be required in the future, but there was wide variation in suggestions for the number and type of vehicles that should be permitted. Several stakeholders referred to **'essential' vehicles being retained on most streets**.

Some people mentioned the **removal of through traffic as a way of reducing traffic**, and others mentioned a significant reduction in the number of freight vehicles in the future.

Boroughs suggested that there is **a need to work together with the City Corporation and TfL on the future development of road pricing** – as it needs a co-ordinated approach.

Most people felt that **safer streets** are a desirable outcome, although few specific interventions were proposed to achieve this, with the implication that safety improvements would come from traffic reductions.

Some businesses said that having **a very safe City would be a selling point for property investors** – this applies to the reduction of road danger and the security of the City against attacks.

Many people expect the City to **promote and embrace the heritage of the Square Mile** – with several people suggesting that the streets of the future should do more to enhance the City's unique history and heritage.

The river was mentioned in several workshops as an under-used asset – the City should, in the future, **promote the riverside walkway as a commuter and leisure walking route**.

**3**

## **Citizen Panel and drop-in session findings**

## 3.1 Citizen Panel and drop-in session findings

### ***Citizen Panel***

Populus, a consultancy specialising in political, reputation, stakeholder and customer research, have been appointed to facilitate a Citizens Panel of City workers and residents. This panel will meet three times during the development of the Transport Strategy and will enable us to gain a deeper understanding of residents and workers' transport needs and concerns.

Approximately 40 people – half residents, half workers – attended the first panel workshop on the evening of 20 March 2018. Attendees took part in exercises and discussion tasks aligned to the City Streets survey questions, with Populus staff facilitating the discussion.

The discussions raised several key challenges and opportunities for improvement that are broadly in line with those emerging from the workshops and survey. These are:

- Competition for space on streets and crowding of pavements, and the need to improve arrangements for people walking at construction sites
- Poor pavement and carriageway quality producing unsafe conditions for people walking and cycling
- Poor air quality and the appearance and tidiness of pavements (e.g. overflowing bins and rubbish awaiting collection)
- Pressure of development and economic activity – especially construction and associated HGVs – causing traffic delays and making footways unsafe for people on foot
- Behaviour of people on foot and on street making getting around the Square Mile slow and frustrating
- Poor accessibility of City streets for people with disabilities or pushing buggies, this is exacerbated by pavement crowding and obstruction
- Pedestrian safety, including inadequate crossing facilities, high traffic speeds and the danger posed by HGVs associated with the construction industry
- The need to educate or improve all users' behaviour through measures such as traffic calming and campaigns

### ***Drop-in sessions***

A series of consultation drop-in sessions were held at various locations around the City. Members of the Strategic Transportation team were available to answer questions about the Transport Strategy and discuss transport issues. Attendees were also able to complete the survey. A combination of lunchtime and evening sessions aimed to make the drop-ins accessible to both City workers and residents. The sessions were advertised on the City Corporation website, through flyers distributed at events and on-street, and through City Corporation social media.

Attendance at the drop-in sessions was generally low, but in line with expectations for engagement of this type - with 26 people attending in total. The drop-in sessions also allowed staff to engage with people passing by and hand out flyers advertising the survey.

Discussions at drop-in sessions largely reflected the issues raised by City Streets survey respondents and workshop participants. Drop-in attendees often spoke about the allocation of space on City streets; the need to prioritise people walking, cycling and using public transport users; reducing air pollution and road danger; and finding ways to manage freight more efficiently.

**4**

**City Streets:  
Transport for a changing Square Mile exhibition**

## 4.1 City Streets: Transport for a changing Square Mile exhibition

The *City Streets: Transport for a changing Square Mile* exhibition was held at the City Centre from 5 February to 31 March 2018. The exhibition took visitors through historic and recent changes to the City's streets and presented the future challenges for transport and streets. The information presented in the exhibition was intended to provoke discussion and visitors were encouraged to feed back their thoughts through the online survey.

The exhibition was open six days a week, including Saturday, providing an opportunity for City workers, residents and visitors to view background materials prior to completing the survey. The City Centre was also used as a base for the majority of formal engagement events. Over 7000 people visited the City Centre over the two-month period.

The exhibition included an informal 'voting' exhibit, which encouraged visitors to answer the question "What are the top three transport issues facing the City" using counters to register their vote. While not a robust consultation tool, the outcomes provide a broad indication of the priorities of those visiting the exhibition. Figure 4.1.1 (right) shows the final outcomes, the votes cast for each option were:

|   |     |
|---|-----|
| Improving the walking experience        | 224 |
| Improving air quality                   | 211 |
| Reducing the amount of traffic          | 127 |
| Providing more seating and public space | 102 |
| Improving the cycling experience        | 96  |
| Making streets safer                    | 81  |
| Managing deliveries and servicing       | 73  |
| Making bus journeys quicker             | 56  |
| Making it easier to find a taxi         | 29  |

Figure 4.1.1 Exhibition voting exhibit and display panels



# 5

## Endnotes

1. [City statistics briefing – February 2018 update](#)
2. [TfL's London Travel Demand Survey webpage](#)
3. [TfL's Healthy Streets for London report](#)
4. [TfL's Key findings from the Healthy Streets survey report](#)