



# Travel in London: Understanding our diverse communities 2019

A summary of existing research

## About Transport for London

Part of the Greater London Authority family led by Mayor of London Sadiq Khan, we are the integrated transport authority responsible for delivering the Mayor's aims for transport.

We have a key role in shaping what life is like in London, helping to realise the Mayor's vision for a 'City for All Londoners'. We are committed to creating a fairer, greener, healthier and more prosperous city. The Mayor's Transport Strategy sets a target for 80 per cent of all journeys to be made on foot, by cycle or using public transport by 2041. To make this a reality, we prioritise health and the quality of people's experience in everything we do.

We manage the city's red route strategic roads and, through collaboration with the London boroughs, can help shape the character of all London's streets. These are the places where Londoners travel, work, shop and socialise. Making them places for people to walk, cycle and spend time will reduce car dependency and improve air quality, revitalise town centres, boost businesses and connect communities.

We run most of London's public transport services, including the London Underground, London Buses, the DLR, London Overground, TfL Rail, London Trams, London River Services, London Dial-a-Ride, Victoria Coach Station, Santander Cycles and the Emirates Air Line. The quality and accessibility of these services is fundamental to Londoners' quality of life. By improving and expanding public transport, we can make people's lives easier and increase the appeal of sustainable travel over private car use.

We are moving ahead with many of London's most significant infrastructure projects, using transport to unlock growth. We are working with partners on major projects like Crossrail 2 and the Bakerloo Line Extension that will deliver the new homes and jobs London and the UK need. We are in the final phases of completing the Elizabeth line which, when open, will add 10 per cent to central London's rail capacity. Supporting the delivery of high-density, mixed-use developments that are planned around active and sustainable travel will ensure that London's growth is good growth. We also use our own land to provide thousands of new affordable homes and our own supply chain creates tens of thousands of jobs and apprenticeships across the country.

We are committed to being an employer that is fully representative of the community we serve, where everyone can realise their potential. Our aim is to be a fully inclusive employer, valuing and celebrating the diversity of our workforce to improve services for all Londoners.

We are constantly working to improve the city for everyone. This means freezing TfL fares so everyone can afford to use public transport, using data and technology to make services intuitive and easy to use, and doing all we can to make streets and transport services accessible to all. We reinvest every penny of our income to continually improve transport networks for the people who use them every day. None of this would be possible without the support of boroughs, communities and other partners who we work with to improve our services. We all need to pull together to deliver the Mayor's Transport Strategy; by doing so we can create a better city as London grows.

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# 1 Preface

The Equality Act 2010 requires that TfL and other public bodies have due regard for all of London's communities when developing services.

In this document we set out in detail a collection of research that we have undertaken or commissioned to identify the different barriers faced by London's communities when accessing transport. We also describe travel patterns, the behaviour of different groups, and attitudes towards issues such as fares, personal safety and security and satisfaction with the services we offer.

We intend for this to be a source document for TfL, to help staff to fulfil their responsibilities to London's diverse communities when designing and delivering our services.

The document also provides information for stakeholders, including those from different communities, to inform their engagement with TfL.



## 2 How to use this document

This document is a collection of research data focusing on travel in London among equality groups.

The data that we have used comes from a number of sources, including qualitative and quantitative research that TfL has commissioned, published third party reports and external sources such as the 2011 Census and other information from the Office for National Statistics (ONS). The London Travel Demand Survey (LTDS) is our own survey of travel behaviours of London residents and we have used this data (from 2016/17) extensively throughout this report.

We have identified seven groups of Londoners who experience a variety of barriers when accessing public transport:

1. Black, Asian and minority ethnic groups (referred to as BAME throughout)
2. Gender (women and men) – We recognise that there may be barriers to transport faced by some transgender women and men, however we do not yet have sufficient data to provide a detailed analysis
3. Older Londoners (aged 65 and over)
4. Younger Londoners (aged 24 and under)
5. Disabled Londoners – with visible and / or hidden mobility, sensory and cognitive impairments
6. Londoners on lower incomes (with household income of less than £20,000 per year)
7. Lesbian, gay and bisexual Londoners (referred to as LGB throughout)

We have presented data from the perspective of the equality group in question. Each chapter follows a similar structure. Here is a brief description of each section:

- Profile – covers the demographic profile of each group
- Transport behaviour – addresses modes of transport used; journey purpose and tickets used
- Barriers – looks at what prevents Londoners in equality groups from using public transport more often. This section also covers issues related to safety and security when travelling in London
- Customer satisfaction – considers how satisfied users of each type of transport are overall, perceptions of value for money and what drives satisfaction levels
- Access to information – addresses the information needs of each group, access to the internet and internet behaviour, use of the TfL website and smartphone use

We have used a numbering system to reference the sources of information in this report, with the number cited in square brackets [x]. You can find the corresponding number and information source in the bibliography at the end of this report. This report uses a variety of data, including qualitative and quantitative research commissioned by us, and published third party reports.

We have also included a glossary for unfamiliar terminology at the end of the report.

You can find further data on borough comparisons in Appendix A.

## 3 Introduction

### 3.1 Inclusive transport in London

The key aim of the Mayor's 2018 Transport Strategy (MTS) is to reduce dependency on cars in favour of increased walking and cycling<sup>1</sup> and public transport use. This modal shift will support the long-term social and economic success of London by addressing the range of safety, health and environmental impacts caused by societal car dependency.

If we are to deliver this aim we need to provide an inclusive transport network where everyone can make seamless, safe, affordable and accessible journeys. By using an inclusive design approach – to put people at the heart of the design process – we will be able to make streets, stations, transport spaces and places more accessible and appealing. This will help to make walking and cycling the more obvious choice – especially for shorter trips – and public transport the best option for longer journeys.

An inclusive transport network will also support the Mayor's commitment to social integration; helping to reconnect communities. By designing places that feel welcoming and secure, we will encourage interaction and reduce levels and fear of crime. Integral to success will be our ability to understand the barriers faced by some of London's communities in getting to work, shops, schools, healthcare, and all the places they want to go.

This update of Travel in London: Understanding our diverse communities (UDC) will help us to do that. UDC 2019 gives us a rich picture of different travel patterns, behaviours and attitudes towards issues such as accessibility, fares, personal safety, security and customer satisfaction. All of our programmes and projects need to consider the data and insights in this report. They will then be able to respond appropriately and play their part in reducing the range of barriers to travelling especially those facing Londoners who are already disadvantaged.

These barriers include overcrowding, safety, crime and the fear of crime, lack of information – especially real-time information – physical/infrastructure barriers, and lack of awareness from staff or other passengers. We also know that one of the most basic barriers to travel is affordability, which can then limit job prospects and social integration.

With this data and insights, we can take an evidenced-based approach to decision making, especially as part of Equality Impact Assessment (EqIA) process. We will continue to use evidence-based EqIAs to identify and support differences in the way that customers need to access our stations, buildings, interchanges, facilities, open spaces and public places. This means we will be able to create environments that everyone can use – confidently, independently; making choices best suited to them.

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<sup>1</sup> Including for those using walking aids, scooters, wheelchairs, adapted cycles and e-bikes.

Use of evidence and research that considers the different travel needs of different groups will also help us to deliver on our Vision Zero goal that, by 2041, all deaths and serious injuries will be eliminated from London's transport network.

To create a fully accessible transport network we need to ensure that inclusive design principles are embedded in all transport schemes from the start. Inclusive ways of thinking are required at every level of decision making to change London's transport for the better.



### **3.2 London: a diverse, changing city**

The capital's diversity makes it an attractive place to live and work in and it is home to people from every corner of the globe. Good transport networks connect communities, open up opportunities and create the conditions for London's global economy to flourish. The transport system can shape and enhance lives. But where it isn't working it can limit opportunities – especially access to work and training – increasing levels of fear and isolation.

The MTS has set a target for 80 per cent of all journeys to be made on foot, by cycle or using public transport by 2041. At the same time London's population is rising and is forecast to grow to 10.8 million by 2041. This growth is expected to generate about six million more trips every day, adding to the existing challenges relating to overcrowding and air quality.

With this increase in population comes a greater need for more affordable housing. Inclusive and affordable transport development is vital to unlocking housing potential in areas yet to be used to their full potential. New developments are particularly good opportunities to create inclusive places for everyone, especially when we plan for older people who have greater accessibility needs.

Our Customer Strategy is to meet all of our customers' needs and make their experience with us more consistent, whoever they are. We want to build a shared sense of responsibility with customers to make travel safer, more reliable and pleasant.

Finally, customer behaviours, working patterns and use of technology are changing. By 2041, travel demands, levels of digital connectivity, expectations of personalisation and ways to plan and make the most accessible journey will have

changed. We need to focus on inclusion as we develop our network for the future – using data and insights to do so.

### 3.3 Progress to date

The use of evidence and customer insights has already shaped the work we do to deliver an inclusive transport network where everyone can make seamless, safe, affordable and accessible journeys. It has led to:

- Freezing fares until 2020 and protecting all transport concessions to help keep travel affordable
- An ambitious programme to make 34 per cent of the Tube network step-free by 2024
- A broader accessibility programme looking at improvements like tactile paving, soft-touch handrails, accessible ticket machines, hearing aid induction loops, removal of ‘clutter’, seating
- Investment in the use of technology to make travel easier for everyone while also building in accessibility features and information
- Developing a real-time information app for stations that gives customers quicker notification of lift closures
- Working across the Tube, Overground and TfL Rail networks, and with rail operators, to ensure that there is a consistent turn-up-and-go service. We are also exploring how technology can help our staff deliver this
- Maintaining the 95 per cent of all bus stops that are now accessible for people who use wheelchairs and mobility scooters
- Using the ‘Please offer me a seat’ badge and card to support customers with invisible impairments, conditions and illnesses. We want our customers to have a shared sense of responsibility towards each other on the network and treat them as they would expect to be treated themselves
- Expanding the range of information available, from accessible bus stops to numbers of steps in Tube stations, to a map showing which parts of the Underground are above ground to help those with claustrophobia
- Continuing to improve and produce paper maps and guides, because our evidence tells us that disabled and older Londoners are less likely to access the internet or own a smartphone
- Continually improving audio/visual information on buses. One-third of buses are fitted with hearing loops, and we are working to improve provision in Tube stations
- Working with the Alzheimer’s Society to improve our infrastructure, signage and information for customers with dementia. We are also running a Dementia Friends training programme for our staff and have developed our own online eLearning

- Carrying out research and working with partners to identify the barriers to travelling for neurodiverse customers especially those with autism, dementia, learning difficulties or mental health issues
- Continuing to train staff in disability equality training and making sure they are available and easy to find at stations. We are also providing this training to our professional services staff to ensure accessibility is built into our services from the start
- Training our staff in the use of equality impact assessments and the principles of inclusive design
- Following bus drivers' customer service training with support to make sure they meet their obligations on wheelchair priority spaces
- Delivering operation 'Safer Travel for All' with British Transport Police officers and Metropolitan Police Roads and Transport Policing Command. This programme works with staff, passengers and local communities to understand concerns around hate crime and promotes key messages
- Delivering a range of engagement events across our network during National Hate Crime Awareness week and hate crime awareness courses for our staff. These will contribute towards a shared sense of respect for each other across the network
- In partnership with Thames Reach, providing support to people rough sleeping on our transport network
- Giving a free-of-charge transport education service to schools within London
- Learning from our Safe Drive Stay Alive scheme, which focused on the behaviour of 18,000 young drivers, who we know are more likely to be involved in a serious collision
- Distributing resources to nurseries via our Children's Traffic Club, targeting those areas where data tells us that people from BAME backgrounds are over-represented in the killed or seriously injured (KSI) statistics
- Reducing risks and raising awareness of unwanted sexual behaviour through the Project Guardian initiative and Report It To Stop It campaign

## 3.4 Background

### 3.4.1 Profile of equality groups in London

The 2011 Census recorded that there are 8,173,941 people who usually live in London and this is set to grow in the coming decades. London's population is extremely diverse and ever-changing [2].

- BAME Londoners make up 40 per cent of the population [2]
- Half of Londoners are women (51 per cent) [2]
- Thirty-two per cent of Londoners are under the age of 25 and 11 per cent are aged 65 or over [2]
- Fourteen per cent of Londoners consider themselves to have a disability that affects their day-to-day activities 'a lot' or 'a little' [2]
- Twenty-eight per cent of Londoners are living in a household with an annual income of less than £20,000 [11]
- London has a higher proportion of adults who identify as lesbian, gay or bisexual (LGB) than any other region of the UK. In London, 2.5 per cent of people consider themselves to be lesbian, gay or bisexual [12]. This is higher in inner London, where five per cent of people living in a couple in inner London are in a same-sex relationship [2]

There are differences in the profile of Londoners who make up each equality group:

- Londoners living in a lower income household (less than £20,000 per year) and older Londoners (aged 65 or over) are more likely to be women [11]
- BAME Londoners are more likely to be younger, while women and those living in lower income households are more likely to be older [2]
- Men are more likely than women, and white Londoners are more likely than BAME Londoners to be working full-time, this may be linked in part to the different age profile of these equality groups [11]

### 3.4.2 Note on data sources

There are two main sources of demographic data used in this document: the ONS Census indicated with reference [2] and the LTD S indicated with reference [11]. Where two sources exist, this report generally refers to the Census as this is considered the most robust source of profile data owing to the large sample size. There may be small differences observed in the specific proportions recorded.

### 3.4.3 Inter-relatedness

Many of the groups in this report are interrelated and therefore some of the differences observed are affected by differences in their demographic profile. For example:

- People on low incomes are also more likely to be older people (24 per cent of those on low income are also 65+ and therefore they are less likely to use technology but are more likely to own a Freedom Pass)
- BAME Londoners are more likely to be younger (33 per cent of BAME Londoners are also aged 24 and under) and are therefore more likely to use technology and to travel for education. They are less likely to own a Freedom Pass
- Disabled people are more likely to be older (44 per cent of disabled people are also over 65) and are more likely to be on a low income (61 per cent of disabled people are also on low income)

Overlap between groups: table showing the proportion of each group across the top, made up by each group at the side

Bold numbers are where a group has a higher proportion compared to other groups. (For instance, 23 per cent of 65+ are also BAME.) (2016/17) [11]

	BAME	Older people	Younger people	People on low incomes	Disabled people	Women
BAME		23%	<b>46%</b>	<b>44%</b>	32%	38%
Older (65+)	8%			<b>24%</b>	<b>44%</b>	14%
Younger (24 & under)	<b>33%</b>			30%	11%	26%
Low income (<£20,000)	33%	<b>54%</b>	32%		<b>61%</b>	31%
Disabled	8%	<b>32%</b>	4%	<b>20%</b>		10%
Women	51%	55%	49%	55%	56%	

More likely than other groups to be...

- Younger
- Low income and disabled
- BAME
- BAME, older and disabled
- Low income and older

LTDS data in this report excludes children aged under five

The ways these different characteristics interact is shown through the way in which the profile of disabled Londoners (identified in the LTDS) varies from that of non-disabled people and Londoners overall. This, in turn, influences many of the findings in this report.

- Fifty-six per cent of disabled Londoners are women, compared with 50 per cent of non-disabled Londoners
- Forty-four per cent of disabled Londoners are aged 65 or over, compared with nine per cent of non-disabled Londoners



- Sixty-seven per cent of disabled Londoners are white, compared with 61 per cent of non-disabled Londoners
- Seventy-seven per cent of disabled Londoners are retired or not working compared with 20 per cent of non-disabled Londoners
- Thirty-four per cent of disabled Londoners have household income of less than £10,000 compared with 10 per cent of non-disabled Londoners [11]



The following table provides LTDS demographic data as this has the most directly comparable travel data by demographic profile of equality groups (2016/17) [11]

	%	All	Men	Women	White	BAME	Aged 24 and under	65+	Less than £20,000	Disabled	Non-disabled
	<b>Base</b>	<b>(17,560)</b>	<b>(8,450)</b>	<b>(9,110)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(4,437)</b>	<b>(2,691)</b>	<b>(4,966)</b>	<b>(1,729)</b>	<b>(15,831)</b>
<b>Gender</b>	<b>Men</b>	50	-	-	50	49	51	45	45	44	50
	<b>Women</b>	50	-	-	50	51	49	55	55	56	50
<b>Age</b>	<b>5-10</b>	9	9	9	7	11	32	-	9	3	9
	<b>11-15</b>	6	6	5	5	8	22	-	7	3	6
	<b>16-24</b>	12	13	12	11	14	46	-	14	5	13
	<b>25-59</b>	56	57	55	56	55	-	-	41	37	58
	<b>60-64</b>	4	4	5	5	4	-	-	5	8	4
	<b>65-70</b>	5	5	6	6	3	-	41	8	11	5
	<b>71-80</b>	5	4	5	6	4	-	39	10	17	4
<b>81+</b>	3	2	3	3	1	-	20	6	16	1	
<b>Ethnicity</b>	<b>White</b>	62	62	61	-	-	53	76	54	67	61
	<b>BAME</b>	37	36	38	-	-	46	23	44	32	37
<b>Household income</b>	<b>Less than £10,000</b>	12	11	14	11	15	14	26	44	34	10
	<b>£10,000–£19,999</b>	16	15	17	14	19	18	28	56	27	15
	<b>£20,000–£34,999</b>	20	20	20	19	22	21	21	-	18	20
	<b>£35,000–£49,999</b>	15	15	14	14	15	14	9	-	9	15
	<b>£50,000–£74,999</b>	15	15	14	16	13	13	7	-	5	15
	<b>£75,000+</b>	23	24	21	26	17	21	8	-	7	24
<b>Working status (16+)</b>	<b>Working full-time</b>	44	54	35	49	36	33	6	15	10	48
	<b>Working part-time</b>	9	5	12	8	10	6	6	10	5	9
	<b>Student</b>	7	7	7	5	10	49	-	10	3	7
	<b>Retired</b>	13	11	14	16	8	-	84	26	47	9
	<b>Not working</b>	12	7	17	10	16	11	3	22	30	11
<b>Disabled (limiting daily activity/ability to travel)</b>	<b>Yes</b>	9	8	10	10	8	4	32	20	-	-

LTDS data in this report excludes children aged under five and working status does not include under-16s.

### 3.4.4 Employment and income

Nearly one in three weekday journeys are work related, with people either travelling to their usual place of work (22 per cent) or conducting other work-related business (nine per cent) [11]. This highlights the importance of employment in understanding travel behaviour and differences in the travel behaviour of different groups reflects wider patterns in employment.

As household incomes increase, the proportion of Londoners in work also rises [11].

Among Londoners living in households with the lowest annual income levels, under £10,000 a year, 28 per cent are retired (26 per cent in 2013/14) [11].

- Higher proportions of women say that they are currently not employed (20 per cent of women compared with eight per cent of men) and 71 per cent of Londoners aged 16 or over and not employed are women
- More women than men are employed part-time (14 per cent of women compared with six per cent of men) and 70 per cent of Londoners working part-time are women [11]
- The employment rate of women is affected by child dependency. Employment rates (noted in 2010) decline steadily from 78 per cent of women with no dependent children to 22 per cent of women with four or more dependent children [37]. These family commitments also change the way in which women use public transport, affecting their travel patterns and behaviour
- Eighty-four per cent of Londoners aged 65 and over are retired and 12 per cent are in full- or part-time work, compared with 86 per cent and 11 per cent in 2013/14
- The proportion of Londoners who are retired ranges from 72 per cent among Londoners aged 65-69 to 96 per cent among Londoners aged 80 or over (76 per cent and 97 per cent respectively in 2013/14) [11]
- With increasing age the proportion of working Londoners decreases and therefore a shift occurs towards increasing proportions in the lower bands for household income [11]
- Among all age groups, disabled Londoners are less likely to be working full or part time than non-disabled Londoners. For example, only 26 per cent of disabled Londoners aged 25-64 are in employment compared with 81 per cent of non-disabled Londoners
- Reflecting the lower levels of employment among Londoners living in a household with an income of less than £20,000 per year, journeys to a usual workplace account for 10 per cent of weekday journeys, compared with 22 per cent for all Londoners (nine per cent and 20 per cent respectively in 2013/14). Other work-related trips make up five per cent of journeys among those with an income of less than £20,000 per year, compared with nine per cent for all Londoners (both in line with the 2013/14 proportions of five per cent and nine per cent respectively) [11]

In addition, transport can be a significant barrier to accessing employment. Two out of five jobseekers say that a lack of transport acts as a barrier to getting work, and one in four say that the cost of transport presents a problem with getting to interviews [38].

Also linked to employment and travel behaviour is household income. However, household income does not always reflect employment or household wealth.

- Thirty-one per cent of women have an income of less than £20,000 per year compared with 26 per cent of men. This may be linked to the higher proportion of women being in part-time employment, retired or not working [11]
- Women get paid less than men on average. The median salary in 2016 for a woman in London was £26,277 compared with £36,761 for men. This is partly owing to the increased number of part-time positions held by women (they occupy 70 per cent of part-time positions in the Capital). However, even when looking solely at full-time salaries, there is still a discrepancy in the average annual pay for women and men; the median full-time annual pay for a woman in London is £32,151, compared with £39,927 for a man [36]
- Average household incomes are substantially lower for older Londoners than Londoners overall; 26 per cent of Londoners aged 65 or over have an annual household income of less than £10,000, compared with 12 per cent of all Londoners. [11]
- Disabled Londoners are more likely to live in a household with an annual income of £20,000 or less than non-disabled Londoners (61 per cent of disabled Londoners compared with 25 per cent of non-disabled Londoners). Although this pattern continues to be observed across all ages, the difference is particularly clear in the mid-age groups; 58 per cent of disabled Londoners who are aged 25 to 64 live in a low income household compared with 19 per cent of non-disabled Londoners of the same age. This is likely to be related to the considerably lower proportion of disabled 25 to 64-year-olds in full or part-time employment (26 per cent compared with 81 per cent among non-disabled 25 to 64-year-olds) [11]

### **3.4.5 Travel behaviour**

Walking is the most common form of public transport for all Londoners. Almost all Londoners walk every week (95 per cent). Disabled Londoners are less likely to walk at least weekly (81 per cent); almost all younger Londoners walk at least once a week (97 per cent) [11].

The bus is the next most commonly used type of transport in the Capital: 59 per cent of Londoners use the bus at least once a week. Londoners in lower income households are the most likely equality group to use the bus at least weekly; seven in 10 Londoners in households with an annual income of less than £20,000 do so (69 per cent). Men and white Londoners are slightly less likely than average to use the bus once a week (56 per cent in both cases), compared to 65 per cent of BAME Londoners and 62 per cent of women [11]. Women are more likely than men to be travelling with buggies and/or shopping, and this can affect transport choices [34].

Disabled Londoners and Londoners aged over 65 use the Tube less than other groups on a weekly basis (21 per cent of disabled Londoners and 28 per cent of Londoners over 65; compared with 41 per cent of all Londoners) [11]. Eighty-four per cent of disabled Londoners report that their disability limits their ability to travel, reflecting that disabled Londoners travel less often than non-disabled Londoners (1.9 compared with 2.4 trips on an average weekday) [11].

Low income Londoners also tend to travel less frequently than Londoners overall – 2.2 trips per weekday on average compared to 2.4 among all Londoners [11]. Among this group, a greater proportion of journeys are completed for the purposes of shopping and personal business: 31 per cent for Londoners with household income of less than £20,000 compared with 22 per cent all Londoners (in line with 31 per cent and 22 per cent observed in 2013/14) [11].



**Proportion of Londoners using modes of transport at least once a week (2016/17) [11]**

%	All	Men	Women	White	BAME	Aged 24 and under	65+	All less than £20,000	Dis-abled	Non-dis-abled
<b>Base</b>	<b>(17,560)</b>	<b>(8,450)</b>	<b>(9,110)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(4,437)</b>	<b>(2,691)</b>	<b>(4,966)</b>	<b>(1,729)</b>	<b>(15,831)</b>
Walking	95	95	95	95	96	97	87	93	81	96
Bus	59	56	63	56	65	66	65	69	58	60
Car as passenger	44	37	51	43	46	62	41	38	42	45
Car as driver	38	42	33	41	32	7	43	23	24	39
Tube	41	43	38	43	37	32	28	32	21	43
National Rail	17	18	15	19	13	12	12	11	9	17
Overground	12	13	11	12	12	10	6	11	7	12
Other taxi/minicab (PHV)	10	10	10	11	8	9	6	9	10	10
London taxi/ black cab	3	3	2	3	1	1	2	2	3	2
DLR	5	6	4	5	7	5	2	5	3	5
Tram	2	2	2	2	2	3	2	2	2	2
Motorcycle	1	2	0	1	0	0	-	1	0	1
Bicycle	8	11	5	10	4	12	2	5	3	9

LTDS data in this report excludes children aged under five.

### 3.4.6 Tickets and passes

We offer different tickets to help people choose the best way to pay for their travel:

- Oyster pay as you go is credit transferred to an Oyster card to pay for journeys. It is designed to be convenient and flexible, with customers only paying for the journeys they make. Fares are based on the time people travel, the day and the service they use
- Contactless payment can be made using either a contactless payment card or a mobile device (such as a smartphone). It offers the same fares and convenience as an Oyster card, without the need to pay for one. Contactless payment charges the same fare as adult Oyster pay as you go.
- Travelcards give unlimited travel within the zones they are purchased for and can be used on bus, Tube, tram, Docklands Light Railway (DLR), London Overground, TfL Rail and many National Rail services. They can be valid for seven days or longer (up to annual) and are usually issued on Oyster
- Paper ticket for single/return journey is a paper ticket for a single or return journey – depending on what is purchased, customers can travel on the Tube, London Overground, TfL Rail, DLR and National Rail
- Free and discounted travel on TfL services is available for customers who are eligible. This is dependent on age, need or other criteria

More information about the range of available tickets and their benefits is on our website, <https://tfl.gov.uk/fares>

### Oyster card ownership is related to age:

Younger Londoners are the most likely equality group to hold an Oyster card: 79 per cent of 16 to 24-year-olds have one [11]

Older people are least likely to hold an Oyster card: only eight per cent of Londoners aged 65 or over own one. The majority of older Londoners (aged 65 or over) hold an older person's Freedom Pass (93 per cent) and this accounts for the lower proportion of Oyster cards held in this group [11]

### Possession of an Oyster card or Freedom Pass (2016/17) [11]

%	All	Men	Women	White	BAME	16-24	65+	Income under £20k	Dis-abled	Non-disabled
<b>Base</b>	<b>(17,560)</b>	<b>(8,450)</b>	<b>(9,110)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(1,970)</b>	<b>(2,691)</b>	<b>(4,966)</b>	<b>(1,729)</b>	<b>(15,831)</b>
Have an Oyster card	60	59	61	59	62	79	8	49	26	63
Older person's Freedom Pass	15	14	17	19	10	0	93	26	45	12
Disabled person's Freedom Pass	1	2	1	1	2	1	0	3	16	0

LTDS data in this report excludes children aged under five.



### 3.4.7 Barriers to public transport use

We have carried out several research programmes to investigate the barriers Londoners face when using public transport and the findings are in general agreement. The most commonly mentioned barrier, more often across all Londoners, is overcrowded services. This is mentioned by 48 per cent of those taking part. Disabled customers (51 per cent), LGB Londoners (52 per cent) and women (52 per cent) are the most likely equality groups to cite this [13]. The antisocial or inconsiderate behaviour of other passengers (for instance drunken, aggressive or threatening/intimidating behaviour, and pushing and shoving) is the next most important concern for customers. Please Offer Me a Seat and other similar initiatives are good examples of how we can improve the shared sense of customer responsibility across the network and alleviate some of these concerns.

However, it is worth noting that the issue of barriers is complex and that the specific questions that we ask Londoners in our research may have had an impact on the response provided. The effects of specific barriers may also be much more significant for some Londoners than others.

- Cost of travel and slow journey times are more commonly mentioned as barriers by some equality groups than across all Londoners
- Cost of travel is more often mentioned as a barrier to public transport use by BAME Londoners (51 per cent) and younger Londoners (50 per cent aged between 16 and 24). Cost of tickets is only mentioned by 10 per cent of older Londoners as a barrier to greater public transport use (reflecting the high use of older people's Freedom Passes among Londoners aged 65 and over) [13]
- Slow journey times is also one of the main barriers to public transport use mentioned (28 per cent of all Londoners). This is a particularly big barrier for younger Londoners aged between 16 and 24 and BAME Londoners (37 per cent and 31 per cent respectively), possibly because younger people are more likely to use buses due to affordability issues and therefore are more likely to experience slow journey times travelling by bus. On the other hand, this is only cited as a barrier by 20 per cent of Londoners aged 65 and over [13]

LGB Londoners report a similar level of barriers to using public transport more frequently as all Londoners, with overcrowded services, cost of travel and disruptions being the three most commonly mentioned factors [13]. However, LGB Londoners are significantly more likely than heterosexual Londoners to have experienced incidents of unwanted sexual behaviour or hate crime [13]. Fears of intimidation and/or abuse are sometimes mentioned by LGB Londoners as barriers for increased public transport use. The extent to which these fears affect travel behaviour depends on people's personalities, previous experiences and the degree to which they perceive themselves as being visibly LGB [86].

Although there may be separate barriers faced by transgender women and men, sufficient data is not yet available to provide a detailed analysis.

Fifty-five per cent of disabled Londoners state that their disability affects their mobility, 22 per cent have a serious long-term illness and 10 per cent have a mental health condition [11]. It is important to note, however, that many disabled people experience multiple impairments. Many of the issues faced by disabled Londoners when travelling by public transport are common to both disabled and non-disabled Londoners. However, disabled Londoners are more likely to say that they are impacted by each barrier compared to non-disabled Londoners [13]. Disabled teenagers reported that using public transport is seen as part of teenage life and that it is both practically and symbolically significant. In many cases, personality (more so than impairment) influences attitudes and behaviour towards public transport use among disabled teenagers [76].

### **3.4.8 Customer satisfaction**

All TfL transport systems receive fairly good overall satisfaction ratings, however BAME Londoners give lower satisfaction ratings compared to white Londoners. In particular, BAME Londoners rate private hire vehicles (both taxis and minicabs), London Overground and Dial-a-Ride lower than white Londoners [15]. Satisfaction levels are very similar between women and men.

Older people aged 65 and over are more satisfied with every mode of London transport compared with all Londoners, except Victoria Coach Station which has the same rating. They are particularly more satisfied with TfL Rail, black cabs, London Overground and trams. Satisfaction levels of younger people remain very similar to those of all Londoners.

Levels of satisfaction with public transport among disabled customers are relatively good. Trams are rated particularly highly, receiving an overall satisfaction rating of 91 out of 100, as well as the DLR, which receives a rating of 88 out of 100 [15]. In general, average satisfaction ratings across various transport types tend to be very similar for disabled and non-disabled customers.

Satisfaction levels remain very similar for those living in households with a lower income and all customers [15]. For bus services, customers living in households with income of £20,000 or less give a very good overall satisfaction rating of 86 out of 100, on par with the mean score of 86 given by all Londoners (both 85 in 2014/15). Likewise, Tube customers living in households with an income of £20,000 or less give a similar satisfaction mean rating of 87 out of 100 to the 85 given by all customers (85 and 84 respectively in 2014/15) [15].



### 3.4.9 Customer care

Just under half of Londoners agree that we care about our customers. Older and disabled customers, as well as those from lower socio-economic groups are the least likely to agree. (Care is a targeted key measure we use to drive customer-focused service and initiatives.)

#### Londoners who agree that 'TfL cares about its customers' (2017/18) [90]

%	Reputation tracker
<b>Base</b>	<b>(3,999)</b>
<b>Total</b>	<b>46</b>
<b>Gender</b>	
Male	47
Female	46
<b>Age</b>	
16-24	48
65+	43
<b>Ethnicity</b>	
White	47
BAME	45
<b>SEG</b>	
ABC1	49
C1DE	43
<b>Disability</b>	
Yes	44
No	48

### 3.4.10 Safety and security

We use a typology of worry to monitor two measures relating to perceived safety of Londoners relating to their personal security (ie from crime or antisocial behaviour) while using public transport in London:

- General worry about personal security when using public transport in London
- The occurrence of specific incidents in the previous three months when using public transport in London

In 2017/18, on average 30 per cent of Londoners reported feeling very or quite worried about their personal security when using public transport. Disabled Londoners (37 per cent), young Londoners aged 16 to 24 years old (35 per cent), women (34 per cent) and BAME Londoners (33 per cent) are the most likely equality groups to be very or quite worried.

Additionally, 32 per cent of Londoners experienced a recent (within three months) worrying incident while using public transport in the Capital. This is higher among BAME Londoners (37 per cent), women (37 per cent), 16 to 24-year-olds (40 per cent) and disabled Londoners (38 per cent) [13].

- Londoners aged 16 to 24 are significantly more likely than average to feel worried about their personal security when using public transport and to have experienced a recent worrying episode while travelling [13]
- Older Londoners (14 per cent) are less likely than Londoners overall (30 per cent) to say they are worried about their personal security when using public transport. They are also less likely to have experienced a specific incident of worry when travelling in the past three months (13 per cent, compared with 32 per cent of all Londoners) [13]

The relationship between concerns around safety and security and equality groups is complex. For example, age, ethnicity, income and whether a person is disabled are all likely to be interrelated. Likewise, the travel patterns, preferences and area in which someone lives also play a part.

### 3.4.11 Access to information

Looking solely at online Londoners (ie those with internet access), there are evidently differences in accessing the internet in certain places.

Sixty-six per cent of all online Londoners access the internet at work, rising to 74 per cent among online 16 to 24-year-olds and 75 per cent of BAME online Londoners.

However, online women (62 per cent), those aged 65 and over (16 per cent), online Londoners in DE households (37 per cent) and disabled online Londoners (47 per cent) are significantly less likely than online Londoners overall to access the internet at work [14].

Young online Londoners aged 16 to 24 and BAME online Londoners are also significantly more likely than all online Londoners to access the internet 'on the move' (92 per cent and 90 per cent respectively).

Conversely, internet access ‘on the move’ is considerably lower than the average among older online Londoners aged 65 and over (41 per cent), disabled online Londoners (70 per cent) and those living in DE households (69 per cent) [14].

More than four out of five online Londoners use a smartphone (84 per cent). Although there has been growth in technology use among all groups, older online Londoners (50 per cent), disabled online Londoners (73 per cent) and those living in DE households (76 per cent) are least likely to use smartphone. In comparison, almost all online 16 to 24-year-olds and BAME online Londoners own or use a smartphone (96 per cent and 94 per cent respectively) [14].

Around nine in 10 online Londoners (89 per cent) use the TfL website. This figure is higher among BAME online Londoners (92 per cent), but lower among those aged over 65 (75 per cent), online Londoners in DE households (77 per cent) and disabled online Londoners (84 per cent). The most common use of the TfL website across each group is journey planning (76 per cent of all online Londoners) [14].



## 4 Black, Asian and minority ethnic (BAME) Londoners

### Key findings

- BAME Londoners account for 40 per cent of the London population [2]
- Walking is the most commonly used type of transport by BAME Londoners. (96 per cent of BAME Londoners walk at least once a week compared with 95 per cent of white Londoners.)
- After walking, the most commonly used type of transport by BAME Londoners is the bus (65 per cent BAME compared with 56 per cent white) [11]
- Oyster pay as you go is the most common ticket used by Londoners on all types of public transport, regardless of ethnic group [30]
- Barriers to increased public transport use are largely similar among BAME Londoners and white Londoners, but there are some barriers that are more likely to be mentioned by BAME Londoners
- BAME Londoners are more likely to be classified as 'worried' while using public transport and to have experienced a specific worrying incident in the past three months when travelling [13]
- In general, BAME Londoners give slightly lower overall satisfaction ratings than white Londoners for most transport types. This is likely to be related to the younger age profile, with lower satisfaction ratings traditionally given by younger customers compared with older customers [15]
- Internet access is very similar for BAME Londoners and white Londoners (91 per cent BAME compared with 90 per cent white) [14]

## **4.1 Summary – BAME Londoner**

### **4.1.1 Profile of BAME Londoners**

BAME Londoners account for 40 per cent of the London population. There are some demographic differences between BAME Londoners and white Londoners. Most notably, BAME Londoners have a much younger age profile than white Londoners. Forty-one per cent of BAME Londoners are aged 24 and under compared with 26 per cent of white Londoners [2].

BAME Londoners are less likely than white Londoners to be in employment (57 per cent BAME compared with 64 per cent white) [2]. They are also more likely to live in households with an average annual income below £20,000 (33 per cent BAME compared with 25 per cent white) [11].

Most Londoners have English as their main language (78 per cent). However, four per cent do not speak English well [2].

### **4.1.2 Transport behaviour**

Walking is the most commonly used form of transport by BAME Londoners (96 per cent BAME walk at least once a week, compared with 95 per cent white). After walking, the bus is the most common type of transport used: 65 per cent of BAME Londoners use the bus at least once a week compared to 56 per cent of white Londoners.

Among different BAME groups bus use varies: 73 per cent of black, 66 per cent of Londoners from 'other' ethnic groups, 64 per cent of mixed ethnic group Londoners and 59 per cent of Asian Londoners use the bus at least once a week. These levels are all generally lower compared with those reported in 2013/14, possibly reflecting a wider decline in bus patronage in the Capital [11].

The use of cars among BAME Londoners is lower than for white Londoners; 32 per cent of BAME Londoners drive a car at least once a week compared with 41 per cent of white Londoners (33 per cent and 43 per cent respectively in 2013/14) [11].

Driving a car is higher among Asian Londoners compared with other BAME groups: 36 per cent of Asian Londoners drive a car at least once a week compared with 27 per cent of black Londoners (39 per cent and 28 per cent respectively in 2013/14) [11].

Cycling levels of BAME Londoners and white Londoners are very similar. Seventeen per cent of BAME Londoners cycle in London at least sometimes compared with 18 per cent of white Londoners, in line with the proportions observed in November 2014 (18 per cent and 17 per cent respectively) [16].

### 4.1.3 Barriers

Barriers to increased public transport use are largely similar among BAME Londoners and white Londoners, but there are some barriers that are more likely to be mentioned by BAME Londoners.

The barriers to greater public transport use that are most commonly mentioned are:

- The cost of travel (51 per cent BAME compared with 36 per cent white)
- Service disruptions (34 per cent BAME compared with 29 per cent white)
- Slow journey times (31 per cent BAME compared with 26 per cent white)

BAME Londoners are significantly less likely than white Londoners to say that they are 'not at all worried' about personal security while using London's public transport (16 per cent BAME compared with 23 per cent white). They are also more likely to report that they are worried (either 'quite worried' or 'very worried'): 33 per cent of BAME Londoners say they are generally worried compared with 29 per cent of white Londoners. The level of worry rises to 40 per cent among Asian Londoners.

BAME Londoners are more at risk of being killed or seriously injured on London's roads, with children in this group being on average 1.5 times more likely to be affected than non-BAME children [17]. BAME Londoners are less likely than white Londoners to say that they feel safe from accidents when walking around London during the day (22 per cent BAME feel 'very safe' compared with 30 per cent white) [18].

### 4.1.4 Customer satisfaction

We measure overall satisfaction with various transport types in London on an 11-point scale, with 10 representing extremely satisfied and zero representing extremely dissatisfied. We then scale this up to 100.

BAME customers are slightly less satisfied with the transport they use than white customers. This applies to overall satisfaction, satisfaction with value for money and other attributes, and is relevant across most types of transport. This is likely to be related to the younger age profile of BAME Londoners, with lower satisfaction ratings traditionally given by younger customers in comparison to older customers.

- BAME customers using the bus are slightly less satisfied overall than white customers (85 out of 100 BAME compared with 87 out of 100 white) [15]
- Satisfaction with value for money of bus travel among BAME customers has risen again in 2016/2017 to 73 out of 100 from 71 out of 100 in 2015/16, having risen from 66 to 70 in 2014/2015. However, this remains slightly lower than among white customers (73 out of 100 BAME compared with 77 out of 100 white) [15]
- Overall satisfaction with the Tube among BAME customers is also slightly lower than among white customers (84 out of 100 BAME compared with 86 out of 100 white) [15]



#### 4.1.5 Access to information

While all online BAME and online white Londoners access the internet at home, online BAME Londoners aged 16-64 are significantly more likely than online white Londoners of the same age are more likely to access the internet in other places:

- Ninety-one per cent of online BAME Londoners aged 16-64 access the internet 'on the move', compared with 85 per cent of online white Londoners aged 16-64
- Seventy-seven per cent of online BAME Londoners aged 16-64 access the internet at work, compared with 72 per cent of online white Londoners aged 16-64 [14]

The main reason both groups use the TfL website is for journey planning. However, BAME online Londoners are more likely than white online Londoners to use the site for ticketing (34 per cent BAME, compared with 28 per cent white) or for budgeting purposes (24 per cent BAME, compared with 16 per cent white) [14].



## 4.2 Introduction

London is one of the most ethnically and culturally diverse cities in the world with BAME people making up 40 per cent of its population [2]. More than 300 languages are spoken and multiple faiths are practised [19].

The age structure of BAME Londoners tends to be younger than white Londoners, and it is estimated that, by 2031, more than half (56 per cent) of London’s 15 to 19 year olds will belong to a BAME group and the proportion of all Londoners from a BAME ethnic group will reach 46 per cent by 2041 [20].

This chapter focuses on transport issues relevant to BAME Londoners. For the purposes of this section, Londoners are grouped according to their reported ethnicity as follows:

### Breakdown of ethnic groups used in this report [11]

Ethnic groups		
White English/Welsh/Scottish/Northern Irish	White	White
White Irish		
Other white British Other white		
Black or black British – Caribbean	Black	Black, Asian and minority ethnic (BAME)
Black or black British – African		
Black or black British – other black background		
Asian or Asian British – Indian	Asian	
Asian or Asian British – Pakistani		
Asian or Asian British – Bangladeshi		
Asian or Asian British – Chinese		
Asian or Asian British – other Asian background	Mixed	
Mixed or multiple ethnic groups – white and black Caribbean		
Mixed or multiple ethnic groups – white and black African		
Mixed or multiple ethnic groups – white and Asian		
Other mixed or multiple ethnic background	Other	
Other ethnic group – Arab		
Other ethnic group – any other		

We want to understand the travel needs of all minority ethnic groups. It is important to clarify that the categories above are those used in the 2011 Census. Although we recognise that they don’t provide a complete set of categories, or provide detail about specific communities (such as Latin Americans, Eastern Europeans, Somalians or Irish Traveller Communities), we often use these categories to compare with other research reports, such as those published by government departments.

### 4.3 Profile of BAME Londoners

Forty per cent of Londoners are from a BAME group [2]. This has increased significantly since 2001 when the comparative figure was 29 per cent and the proportion is forecast to increase further in future [22]. Population projections suggest that the proportion of BAME Londoners will rise to 46 per cent by 2041 [20].

#### Ethnic groups in London from the ONS Census [2]

%	2011 Census	2001 Census <sup>2</sup>
White	60	71
BAME	40	29
Black/African/Caribbean/black British	13	11
Asian/Asian British	18	12
Mixed/other	8	6

We continuously survey Londoners for the LTDS, which is a sample survey of Londoners and the equivalent figures from this are 62 per cent white and 37 per cent BAME [11].

#### LTDS ethnic groups in London (2016/17) [11]

%	LTDS
<b>Base</b>	<b>(17,560)</b>
White	62
BAME	37
Black	12
Asian	19
Mixed/other	6

LTDS data in this report excludes children aged under five. Where percentages do not add up to 100 is owing to rounding multiple responses and refusal to answer the question.

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<sup>2</sup> There is a slight change in the definition of ethnic groups between the 2001 and 2011 Census. See [www.ons.gov.uk](http://www.ons.gov.uk) for details.

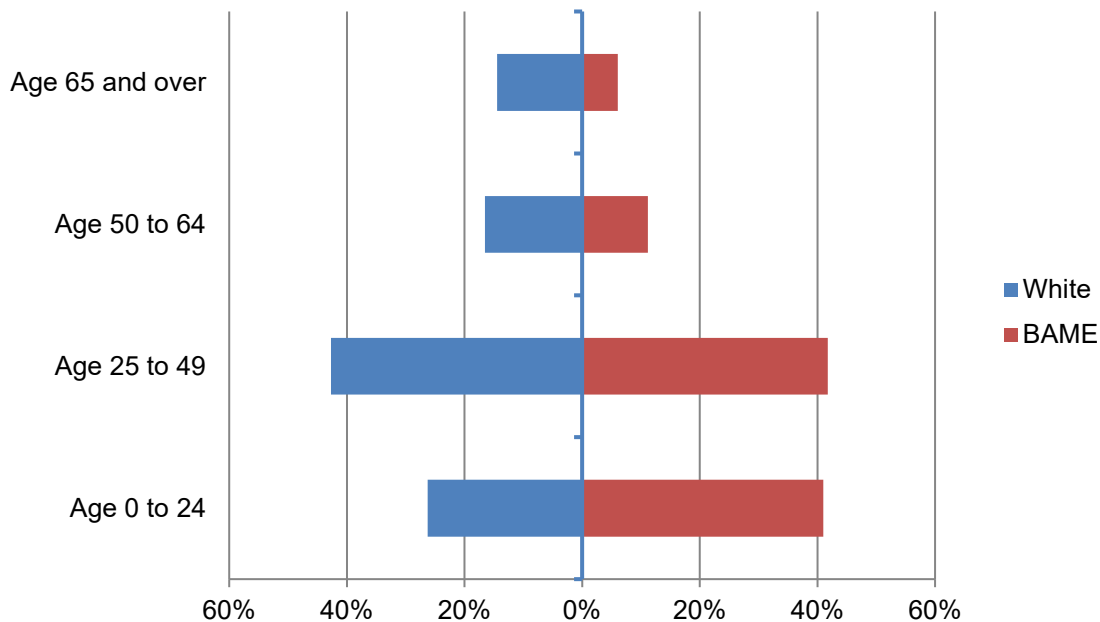
## LTDS demographic profile of ethnic groups in London (2016/17) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base</b>	<b>(17,560)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(1,984)</b>	<b>(3,049)</b>	<b>(470)</b>	<b>(596)</b>
<b>Gender</b>							
Men	50	50	49	45	51	47	52
Women	50	50	51	55	49	53	48
<b>Age</b>							
5-10	9	7	11	11	11	17	11
11-15	6	5	8	9	7	11	8
16-24	12	11	14	14	13	21	15
25-59	56	56	55	54	57	46	57
60-64	4	5	4	4	4	2	3
65-70	5	6	3	3	3	1	3
71-80	5	6	4	4	4	2	3
81+	3	3	1	1	1	0	1
<b>Household income</b>							
Less than £10,000	12	11	15	19	11	11	20
£10,000–£19,999	16	14	19	22	17	16	19
£20,000–£34,999	20	19	22	20	21	27	23
£35,000–£49,999	15	14	15	14	17	15	15
£50,000–£74,999	37	42	30	25	33	31	23
£75,000+	23	26	17	13	19	18	15
<b>Working status*</b>							
Working full-time	44	49	36	37	38	35	31
Working part-time	9	8	10	8	10	9	12
Student	7	5	10	11	9	12	13
Retired	13	16	8	8	10	3	8
Not working	12	10	16	16	16	12	18
<b>Disabled</b>							
Yes	9	10	8	10	6	4	9
No	91	90	92	90	94	96	91
<b>Impairment affects travel</b>							
Yes	9	10	8	11	7	4	10
No	91	90	92	89	93	96	90

\*LTDS data in this report excludes children aged under five and working status does not include under-16s. All TfL surveys use the Equality Act 2010 to define 'disabled people' as: 'those who define themselves as having a long-term physical or mental disability or health issue that impacts on their daily activities, the work they can do or limits their ability to travel'.

BAME Londoners tend to have a younger age profile than white Londoners. Forty-one per cent of BAME Londoners are under 25, compared with 26 per cent of white Londoners [2].

**Number of Londoners by ethnic group 2011 [2]**



Please note: The younger age profile of BAME Londoners has an impact on many of the travel behaviours covered in this chapter and should be kept in mind when using the results.

**4.4 Employment and income**

The Census data and LTDS show similar patterns in terms of employment and income levels although the exact percentages differ slightly. According to the Census, 57 per cent of BAME Londoners are in employment compared with 64 per cent of white Londoners aged 16 or over [2].

More BAME Londoners are in education than white Londoners (the Census records 12 per cent BAME compared with five per cent white) [2].

Reflecting the older age profile, more white Londoners are retired than BAME Londoners (the Census records eight per cent BAME compared with 17 per cent white) [2].

## 2011 Census – Economic activity of Londoners (16 years old and over) [2]

%	White	BAME
Employed	64	57
Unemployed	4	7
Students (economically inactive)	5	12
Retired	17	8
Long-term sick/disabled/other	6	8
Looking after home/family	4	7

Students fall into employed, unemployed and economically inactive categories.

Higher proportions of BAME Londoners have an annual household income of below £20,000 (33 per cent) than white Londoners (25 per cent). The respective proportions reported in 2013/14 were 43 per cent and 32 per cent [11].

There is substantial discrepancy between ethnic minority groups though, with the proportion that have an annual household income of less than £20,000 ranging from 27 per cent of mixed ethnicity Londoners up to 41 per cent of black Londoners [11].

### 4.5 Languages spoken

Twenty-two per cent of Londoners have a language other than English as their first language, with Polish (two per cent), Bengali (one per cent), Gujarati (one per cent), French (one per cent) and Urdu (one per cent) being the top five main languages spoken [2]. This shows the wide range of languages used in London, and according to the Greater London Authority (GLA) 300 languages are spoken across the city [23].

European languages are spoken by 42 per cent of residents whose main language is not English, making them the largest language group in London. South Asian languages are spoken by 29 per cent of people whose main language is not English. The remaining 29 per cent are split relatively equally among African (eight per cent), Middle Eastern which includes Turkish and Arabic (eight per cent), East Asian (seven per cent) and West/Central Asian languages (five per cent). Languages outside these groups, such as Caribbean Creole and sign language, account for the remaining one per cent [24].

The 2011 Census revealed that four per cent of Londoners have difficulty speaking English. Difficulties speaking English are more common among older Londoners. Two per cent of those aged between three and 15 do not speak English well compared with six per cent of 65-year-olds and over.

## 2011 Census – Londoners’ ability to speak English [2]

%	English is main language	English not main language but spoken well	English not spoken well
<b>All</b>	78	18	4
<b>Age</b>			
3-15	85	13	2
16-24	79	19	2
25-34	69	27	4
35-49	74	21	5
50-64	81	13	5
65+	86	8	6

## 4.6 Religion and beliefs

The 2011 Census shows that the representation of religion and beliefs of Londoners has changed over the past 10 years. There has been a decline in the proportion of Londoners considering themselves to be Christian (58 per cent to 48 per cent). There has also been an increase in the proportion who do not identify with any religion (16 per cent to 21 per cent) [2].

The largest religious and faith groups in London are:

### Religions and faith groups in London [[2], [23], AB]

%	2011	2001
<b>Christianity</b>	48	58
<b>Islam</b>	12	9
<b>Hinduism</b>	5	4
<b>Judaism</b>	2	2
<b>Sikhism</b>	2	2
<b>Buddhism</b>	1	1
<b>Other</b>	1	1
<b>Not religious</b>	21	16
<b>Undeclared</b>	8	9

Religion varies considerably between ethnic groups:

- While 28 per cent of white and 27 per cent of mixed Londoners report they have no religion, only seven per cent of black and eight per cent of Asian Londoners report this
- More than half of black (68 per cent) and white (57 per cent) Londoners report that they are Christian
- Asian Londoners and Londoners who have selected ‘other’ to describe their ethnic group are most likely to be Muslims (36 per cent of Asian Londoners and 50 per cent of Londoners selecting ‘other’ ethnic group are Muslims)

## Religion by ethnic group [2]

%	White	BAME	Black	Asian	Mixed	Other
Christian	57	36	68	12	47	22
Buddhist	-	2	-	4	1	1
Hindu	-	12	-	26	1	2
Jewish	3	-	-	-	1	3
Muslim	3	27	15	36	10	50
Sikh	-	4	-	7	-	4
Other religion	-	1	-	1	1	1
No religion	28	10	7	8	27	10
Religion not stated	9	8	9	6	12	9

## 4.7 London boroughs

Some boroughs have a higher proportion of BAME residents than others. Those with the largest proportion are:

### London boroughs with highest proportion of BAME residents [2]

Borough	% of BAME residents
Newham	71
Brent	64
Harrow	58
Redbridge	57
Tower Hamlets	55

The boroughs with the smallest proportion of BAME residents are:

### London boroughs with lowest proportion of BAME residents [2]

Borough	% of BAME residents
Havering	12
Richmond upon Thames	14
Bromley	16
Bexley	18
Sutton	21

There is a high concentration of BAME residents in the most deprived boroughs. According to Indices of Deprivation released by the ONS, the most deprived London boroughs are Tower Hamlets, Hackney, Barking and Dagenham, and Newham [25], all of which have large proportions of BAME residents.



## 4.8 Travel behaviour

The average number of trips completed per weekday (among those travelling on any weekday) varies slightly according to ethnicity. On average, BAME Londoners make 2.2 trips per weekday, significantly less than the 2.5 trips made by white Londoners (lower than the 2.5 trips and 2.8 trips observed respectively in 2013/14) [2].

## 4.9 Transport types used

Walking at least once a week is almost universal across all ethnic groups. After walking, the most commonly used types of transport for all Londoners are buses, cars (as passengers) and the Tube [11].

The proportion of Londoners using each type of transport at least once a week varies according to ethnicity. BAME Londoners are more likely than white Londoners to use the bus, DLR or to travel as a car passenger at least once a week. In contrast, lower proportions of BA

ME Londoners travel at least once a week by Tube, National Rail and private hire vehicles (both black cabs and minicabs) than white Londoners. Few differences are seen between white and BAME Londoners for their frequency of use of the Overground or trams [11].

Looking specifically at the differences between ethnic minority groups, the use of buses is particularly high among black Londoners, with 73 per cent using this type of transport at least once a week, compared with 65 per cent of all BAME Londoners and 56 per cent of white Londoners) [11]. Research among BAME Londoners suggests this is because buses are seen to be cheaper than other



transport options and have a more comprehensive route network also reaching destinations where there is no access to the Underground [26].

The use of cars (as the driver) continues to be higher among Asian Londoners (36 per cent) than other BAME groups [11].

### Proportion of Londoners using types of transport at least once a week (2016/17) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base</b>	<b>(17,560)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(1,984)</b>	<b>(3,049)</b>	<b>(470)</b>	<b>(596)</b>
Walking	95	95	96	96	96	94	93
Bus	59	56	65	73	59	64	66
Car (as a passenger)	44	43	46	41	50	51	40
Car (as a driver)	38	41	32	24	36	27	29
Tube	41	43	37	36	36	38	41
National Rail	17	19	13	16	11	16	8
Overground	12	12	12	15	9	14	11
Other taxi/minicab (PHV)	10	11	8	10	6	11	8
London taxi/black cab	3	3	1	1	1	1	5
DLR	5	5	7	7	6	9	2
Tram	2	2	2	4	2	3	0
Motorbike	1	1	0	0	0	1	1

LTDS data in this report excludes children aged under five.

Where there is more detailed information on the use of individual types of transport, we have included a sub-section.

## 4.10 Walking

There is little difference between the frequency of walking among BAME and white Londoners. Ninety-seven per cent of BAME Londoners walk at least once a week, which is very similar to white Londoners at 95 per cent [11].

BAME Londoners are more likely than white Londoners to walk every day: 86 per cent of BAME Londoners walk five or more days a week compared with 82 per cent of white Londoners (in line with the levels reported in 2013/14 of 85 per cent and 81 per cent respectively) [11].

## Frequency of walking (2016/17) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base</b>	<b>(17,560)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(1,984)</b>	<b>(3,049)</b>	<b>(470)</b>	<b>(596)</b>
5 or more days a week	84	82	86	86	86	87	82
3 or 4 days a week	5	6	5	4	5	4	6
2 days a week	4	4	3	4	3	2	2
1 day a week	2	3	2	2	2	2	3
At least once a fortnight	0	0	0	0	0	0	1
At least once a month	1	1	0	0	0	0	0
At least once a year	0	0	0	0	0	1	0
Not used in last year	1	1	1	1	1	0	0
Never used	3	3	2	2	2	5	5

LTDS data in this report excludes children aged under five.

The purpose of walking journeys varies between BAME and white Londoners:

- BAME Londoners are more likely than white Londoners to walk (at least once a week) to get to/from work, school or college (60 per cent compared with 44 per cent), to visit friends and relatives (60 per cent compared with 49 per cent) and to take a child to school (41 per cent compared with 27 per cent)
- White Londoners are more likely than BAME Londoners to walk (at least once a week) to visit pubs/restaurants/cinemas and other social places (60 per cent compared with 51 per cent)
- BAME Londoners are slightly more likely to walk as part of a longer journey (70 per cent compared with 68 per cent) [18]

## Walking at least once a week by purpose of journey (2018) [18]

% who walk at least once a week	All	White	BAME
<b>Base</b>	<b>(946)</b>	<b>(745)</b>	<b>(201)</b>
• To complete small errands such as getting a newspaper or posting a letter	78	80	76
• As part of a longer journey	69	68	70
• To visit pubs/restaurants/cinemas and other social places	57	60	51
• To get to work/school/college	50	44	60
• To visit friends and relatives	51	49	60
• To take a child to school	32	27	41

## 4.11 Bus

Bus use among BAME Londoners is higher than among white Londoners (65 per cent BAME compared with 56 per cent white Londoners using the bus at least once a week). The proportion of black Londoners using the bus at least once a week is 73 per cent. This is considerably higher than any other ethnic group (64 per cent of mixed Londoners and 59 per cent of Asian Londoners use the bus at least once a week) [11].

The greater use of buses by BAME Londoners is also shown by comparing data from the Bus User Survey (2014) against the proportion of BAME Londoners in the population. Forty-seven per cent of day bus users and 46 per cent of night bus users are BAME customers, whereas BAME Londoners account for only 40 per cent of the total London population [27].

### Comparison of day and night bus users with London population (2014) [28, AB]

%	White	BAME	Black	Asian	Mixed
All Londoners* [2]	60	40	8	18	13
Day bus users	52	47	20	14	4
Night bus users	54	46	17	13	5

Table excludes under-16s

\*Figures for 'All Londoners' come from the 2011 Census.

BAME bus users are as likely as white customers to take the bus to or from work during the day (54 per cent of BAME bus users travel to or from work during the day compared with 53 per cent of white bus users, and 52 per cent of BAME Londoners compared with 51 per cent white Londoners at night).

A higher proportion of white Londoners travelling by bus at night are doing so for leisure purposes compared to BAME bus users (17 per cent BAME compared with 27 per cent white). White bus users are also more likely to be travelling for leisure purposes during the day (six per cent BAME compared with 12 per cent white) although the difference is less marked than at night.

### Purpose of bus journey by ethnic group and time of day (2014) [27]

%	During the day		At night	
	White	BAME	White	BAME
<b>Base (weighted)</b>	<b>(17,221)</b>	<b>(15,109)</b>	<b>(4,192)</b>	<b>(3,550)</b>
To/from or for work	53	54	51	52
To/from school or education	4	10	2	5
To/from shopping	12	9	1	2
Visiting friends/relatives	9	9	13	15
Leisure	12	6	27	17
Personal business	6	8	2	2
Other purpose	3	4	5	6

Black Londoners are the most likely ethnic group to use a bus every day: 45 per cent compared with 26 per cent of all Londoners [11].

### Frequency of travelling by bus (2016/17) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base</b>	<b>(17,560)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(1,984)</b>	<b>(3,049)</b>	<b>(470)</b>	<b>(596)</b>
5 or more days a week	26	22	34	45	28	34	31
3 or 4 days a week	12	12	11	11	10	13	14
2 days a week	11	11	10	9	11	10	8
1 day a week	11	11	10	8	11	8	13
At least once a fortnight	7	8	5	5	6	5	5
At least once a month	10	11	9	7	9	12	10
At least once a year	14	14	14	10	17	12	13
Not used in last year	6	7	4	4	6	4	2
Never used	4	4	3	2	3	3	5

LTDS data in this report excludes children aged under five.

## 4.12 Car

BAME Londoners are less likely to hold a driving licence than white Londoners (54 per cent BAME aged 17 years or over compared with 71 per cent white). Asian Londoners and Mixed Londoners are slightly more likely than other BAME groups to hold a driving licence (57 per cent) [11].

The frequency with which people drive a car continues to vary across BAME groups – 36 per cent of Asian Londoners aged 17 years or over drive at least once a week compared to 27 per cent of black Londoners and 24 per cent of

mixed Londoners. These proportions are largely in line with those observed in 2013/14 (39 per cent, 28 per cent and 22 per cent respectively) [11].

### Proportion of Londoners (aged 17+) with a full car driving licence (2016/17) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base</b>	<b>(14,899)</b>	<b>(9,831)</b>	<b>(4,831)</b>	<b>(1,554)</b>	<b>(2,501)</b>	<b>(308)</b>	<b>(468)</b>
Holds a full car driving licence	65	71	54	48	57	57	55

Figures include all Londoners aged 17 and over.

BAME Londoners are slightly less likely than white Londoners to live in a household that owns or has access to a car (64 per cent compared with 65 per cent). There are some big differences between BAME groups, with Asian Londoners being the most likely to own or have access to a car (73 per cent) compared with 55 per cent of black Londoners and 59 per cent of mixed Londoners [11].

### Household access to a car (2016/17) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base</b>	<b>(17,560)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(1,984)</b>	<b>(3,049)</b>	<b>(470)</b>	<b>(596)</b>
0 cars	35	35	36	45	27	41	44
1 car	44	44	44	42	47	41	40
2+ cars	21	21	20	13	26	18	16

LTDS data in this report excludes children aged under five.

## 4.13 Tube

Tube use among BAME Londoners is slightly lower than among white Londoners (37 per cent of BAME Londoners use the Tube at least once a week compared with 43 per cent white). When looking at individual BAME groups there is very little difference [11].

### Frequency of travelling by Tube (2016/17) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base</b>	<b>(17,560)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(1,984)</b>	<b>(3,049)</b>	<b>(470)</b>	<b>(596)</b>
5 or more days a week	17	17	16	15	15	18	16
3 or 4 days a week	7	7	6	7	5	8	7
2 days a week	8	9	6	6	6	5	8
1 day a week	9	10	9	8	9	7	10
At least once a fortnight	8	8	8	8	8	7	7
At least once a month	15	14	16	15	18	16	16
At least once a year	23	21	26	27	27	24	22
Not used in last year	8	9	6	8	6	6	5
Never used	6	5	6	6	6	9	9

LTDS data in this report excludes children aged under five.

### 4.14 Cycling

Cycling levels among BAME Londoners and white Londoners remain very similar. Seventeen per cent of BAME Londoners cycle in the Capital at least sometimes, compared with 18 per cent of white Londoners. These levels are in line with those reported in November 2014 (18 per cent of BAME Londoners and 17 per cent of white Londoners respectively) [16].

### Proportion of Londoners who cycle (November 2017) [16]

%	All	White	BAME
<b>Base</b>	<b>(2,367)</b>	<b>(1,597)</b>	<b>(770)</b>
Cyclist (used a bike to get around London in the last 12 months)	17	18	17
Non-cyclist (not used a bike to get around London in the last 12 months)	83	82	83

There is also very little difference between white and BAME Londoners in frequency of cycling (at least once a week) in London (12 per cent BAME compared with 14 per cent white). These proportions are very similar to those observed in November 2014 (14 per cent BAME and 13 per cent white) [16].

### Frequency of travelling by bicycle (November 2017) [16]

%	All	White	BAME
<b>Base</b>	<b>(2,367)</b>	<b>(1,597)</b>	<b>(770)</b>
5 or more days a week	3	3	4
3 or 4 days a week	4	5	4
2 days a week	3	4	2
1 day a week	2	2	2
At least once a fortnight	2	1	2
At least once a month	-	1	-
At least once a year	1	-	1
Not used in last year	-	-	-
Never used	82	82	83

Most Londoners, regardless of whether they cycle currently, know how to ride a bike. BAME Londoners are less likely than white Londoners to be able to ride a bike (78 per cent compared with 84 per cent). The respective proportions reported in November 2014 were 83 per cent and 84 per cent [16].

### Proportion of Londoners able to ride a bike (November 2017) [16]

%	All	White	BAME
<b>Base</b>	<b>(2,367)</b>	<b>(1,597)</b>	<b>(770)</b>
Can ride a bike	81	84	78
Cannot ride a bike	17	15	21

We have developed a behavioural change model to look at Londoners' readiness to cycle or ride more if they already do. According to this model, even though BAME Londoners are less likely to be able to ride a bicycle, they are also more likely to be contemplating their cycling frequency (13 per cent compared with nine per cent of white Londoners). Both proportions are in line with those from November 2014 (12 per cent and eight per cent respectively) [16].



## Behaviour change model of cycling (November 2017) [16]

%	All	White	BAME
<b>Base</b>	<b>(2,367)</b>	<b>(1,597)</b>	<b>(770)</b>
<b>Pre-contemplation:</b> I have never thought about it but would be unlikely to start in the future' 'I have thought about it but don't intend starting in the future' 'I have never thought of starting but could be open to it in the future'	66	67	65
<b>Contemplation:</b> 'I am thinking about starting in the future'	10	9	13
<b>Preparation:</b> 'I have decided to start soon'	5	6	5
<b>Change:</b> 'I have tried to start recently but am finding it difficult' 'I have started recently and am finding it quite easy so far'	2	2	2
<b>Sustained change:</b> 'I started a while ago and am still doing it occasionally' 'I started a while ago and am still doing it regularly'	9	10	7
<b>Lapsed:</b> 'I started doing this but couldn't stick to it'	7	7	7

### 4.15 Cycling schemes

Awareness of Cycle Hire is relatively high among all Londoners. However, BAME Londoners are less likely than white Londoners to be aware of it (78 per cent compared with 81 per cent).

Twenty-nine per cent of BAME Londoners have hired a bicycle through the scheme compared with 26 per cent of white Londoners, compared to 21 per cent and 15 per cent respectively in November 2014 [16].

Twenty-two per cent of casual Cycle Hire users (defined as not having a Cycle Hire membership key) are BAME customers and nine per cent of Cycle Hire members are BAME customers, compared with 17 per cent and seven per cent respectively in 2013 [28].

Thirty-four per cent of BAME Londoners report that they will definitely/probably use the scheme in the next year compared with 25 per cent of white Londoners. The respective proportions in November 2014 were 37 per cent and 22 per cent [16].

### Expected use of Cycle Hire in the future (November 2017) [16]

%	All	White	BAME
<b>Base (non-members)</b>	<b>(1,165)</b>	<b>(784)</b>	<b>(381)</b>
Yes, definitely/probably	28	25	34
Yes, definitely	14	13	16
Yes, probably	14	12	17
No, probably not	15	16	15
No, definitely not	38	42	30
Not sure	19	18	21

Across all ethnic groups, awareness of Cycleways is lower than for Cycle Hire. BAME Londoners are less likely to be aware of Cycleways: 59 per cent are aware compared with 68 per cent of white Londoners (53 per cent and 65 per cent respectively in November 2014) [16].

A similar proportion of BAME and white Londoners report that they have used a Cycleway (15 per cent BAME compared with 18 per cent white). BAME Londoners are again more likely than white Londoners to say they will definitely/probably use the Cycleways in the future: 30 per cent compared with 26 per cent (compared with 28 per cent and 21 per cent in November 2014) [16].

### Expected use of Cycleways in the future (November 2017) [16]

%	All	White	BAME
<b>Base</b>	<b>(1,266)</b>	<b>(855)</b>	<b>(411)</b>
Yes, definitely/probably	28	26	30
Yes, definitely	12	12	12
Yes, probably	15	14	18
No, probably not	15	15	16
No, definitely not	36	39	30
Not sure	21	20	24

## Case Study: Cycle Grants London funding programme



We're continuing to invest in cycling over the next five years to make it easier and more appealing to all Londoners.

Our Cycle Grants London programme, managed by Groundwork London, has more than £240,000 to help up to 30 groups offer a range of initiatives for people who may not otherwise ride a bike. These include training, loan bikes, guided rides and courses to teach basic cycle maintenance. The grants are designed for groups that are traditionally under-represented in cycling because of a range of issues, such as income, health, ability, skills or access.

Staynton Brown, Director of Diversity and Inclusion, said: 'We're working hard to make cycling more accessible for everyone and it's fantastic to hear of so many success stories. As we enter the fourth year of this scheme, we hope to encourage even more Londoners of all ages and backgrounds to take up cycling, improving their wellbeing and London's air quality and congestion.'

As part of the Mayor's Transport Strategy, the Mayor has set a target to increase the proportion of people walking, cycling and taking public transport to 80 per cent of journeys by 2041, compared with 64 per cent now. Encouraging more Londoners to take up cycling is an important part of this work.

Since it began, our Cycling Grants London programme has helped 90 projects encourage more than 14,000 people to cycle. We also have a number of other programmes promoting cycling in London including Santander Cycles, Cycle Skills sessions (which are free in all London boroughs) and Cycling Workplaces, offering organisations without cycling facilities up to £10,000 worth of cycling products and services to encourage employees to cycle to work.

## 4.16 Dial-a-Ride

Thirty-two per cent of Dial-a-Ride members are BAME compared with 68 per cent who are white. The proportion of BAME Dial-a-Ride members decreases as the age of the member increases: 12 per cent of Dial-a-Ride members who are aged 90 or over are BAME, compared with 44 per cent of those aged 65-79 years old [29].

### Dial-a-Ride membership by ethnicity (2016) [2, 30]

%	All disabled Londoners	Dial-a-Ride members	65-79 years-old	80-89 years-old	90+ years old
<b>Base (excludes unknown data)</b>	-	<b>(39,166)</b>	<b>(9,404)</b>	<b>(14,177)</b>	<b>(8,573)</b>
White	66	68	56	72	88
BAME	34	32	44	28	12

## 4.17 Journey purpose

Across all travel in London, the purpose of journeys varies slightly by ethnicity, especially between the ethnicity groups which make up BAME Londoners. BAME Londoners are generally more likely than white Londoners to travel by public transport for reasons relating to education, including escorting children to school (29 per cent compared with 15 per cent). BAME Londoners are less likely than white Londoners to use public transport during the week for leisure purposes (15 per cent compared with 23 per cent), while Asian Londoners are least likely to be making journeys for leisure (13 per cent). This may be related to the younger age profile of BAME Londoners, as younger people tend to make fewer leisure trips on weekdays [11].

### Weekday journey purpose (2016/17) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base – all trips by Londoners</b>							
Shopping/personal business	22	22	20	23	18	23	22
Usual workplace	22	22	21	19	24	17	18
Leisure	20	23	15	14	13	20	21
Education	20	15	29	28	30	26	26
Other work-related	9	9	7	8	7	9	6
Other	7	7	8	8	9	5	7

LTDS data in this report excludes children aged under five.

Mixed ethnicity Londoners are the most likely of all ethnic groups to be making weekday journeys to their usual workplace (17 per cent) [11].

## 4.18 Ticket types

Oyster pay as you go is the most common ticket type used by Londoners on all types of public transport, regardless of ethnic group. It is used by a higher proportion of BAME Londoners than white Londoners. Sixty-four per cent of BAME Londoners use Oyster pay as you go, compared with 50 per cent of white Londoners. This pattern is the same for contactless card payments, which are used by a higher proportion of BAME Londoners than white Londoners (54 per cent compared with 45 per cent) [30].

### Methods used to pay for public transport (2018) [30]

%	All	White	BAME
<b>Base - All Londoners:</b>	<b>(750)</b>	<b>(543)</b>	<b>(184)</b>
Oyster pay as you go	53	50	64
Contactless payment (card)	47	45	54
Oyster Travelcard	12	35	33
Paper ticket for single/return journey	18	17	18
Contactless payment (mobile device)	13	13	11
Paper Travelcard (daily, weekly, monthly)	34	13	13
Net: Oyster	72	70	78
Net: Contactless	49	47	56

As respondents could select more than one ticket type, totals may equal more than 100 per cent.

These ticket options were available at the time of the survey but may have changed since. The latest ticketing information is available at <https://tfl.gov.uk/fares/>

### Oyster card

A slightly higher proportion of BAME Londoners hold an Oyster card than white Londoners. White Londoners are the least likely to hold an Oyster card (59 per cent). There is very little difference between different BAME groups, although the proportion of mixed ethnicity Londoners who have an Oyster card has risen from 52 per cent in 2013/14 to 62 per cent in 2016/17 [11].

## Possession of an Oyster card (2016/17) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base</b>	<b>(17,560)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(1,984)</b>	<b>(3,049)</b>	<b>(470)</b>	<b>(596)</b>
Have an Oyster card	60	59	62	61	63	62	60
Do not have an Oyster card	40	41	38	39	37	38	40

LTDS data in this report excludes children aged under five.

Oyster card ownership excludes Freedom Passes, Oyster photocards and Zip cards.

### Freedom Pass

Nineteen per cent of white Londoners have Freedom Passes compared with 10 per cent of BAME Londoners. These differences are largely linked to the differing age profile of BAME and white Londoners. The proportion of BAME and white Londoners aged 65 and over who hold a Freedom Pass is similar: 91 per cent and 93 per cent respectively [11].

Mixed Londoners remain significantly less likely than all other ethnic groups to hold an older person's Freedom Pass, reflecting the younger age profile of this group [11].

### Freedom Passes held (2013/14) [11]

%	All	White	BAME	Black	Asian	Mixed	Other
<b>Base</b>	<b>(17,560)</b>	<b>(11,173)</b>	<b>(6,099)</b>	<b>(1,984)</b>	<b>(3,049)</b>	<b>(470)</b>	<b>(596)</b>
Older person's Freedom Pass	15	19	10	10	11	5	9
Disabled person's Freedom Pass	1	1	2	3	1	1	1

LTDS data in this report excludes children aged under five.

## 4.19 Barriers

We have carried out several research programmes to investigate the barriers that Londoners face when using public transport and their findings are in general agreement. However, the issue is complex and the specific questions that Londoners were asked may have had an influence upon their responses. The impact of specific barriers may also be much more significant for some Londoners than others.

Barriers to increased public transport use are largely similar among BAME Londoners and white Londoners, but there are some more likely to be mentioned by BAME Londoners. Those most commonly mentioned are:

- The cost of travel (51 per cent compared with 36 per cent)
- Service disruptions (34 per cent compared with 29 per cent)
- Slow journey times (31 per cent compared with 26 per cent)

For many potential barriers put to Londoners (including concerns about antisocial behaviour, fear of crime and lack of transport information) a greater proportion of BAME Londoners than white Londoners cite these as potentially stopping them from using public transport more often [13].

### Barriers to using public transport more often (2017/18) [13]

%	All	White	BAME	Mixed	Asian	Black
<b>Base</b>	<b>(6,167)</b>	<b>(4,245)</b>	<b>(1,830)</b>	<b>(345)</b>	<b>(824)</b>	<b>(553)</b>
Overcrowding/cramped conditions	48	47	49	54	44	52
Cost of travel	41	36	51	48	52	49
Disruptions to the service	31	29	34	30	33	35
Slow journey times	28	26	31	30	28	35
Passengers pushing and shoving each other	26	25	27	28	25	29
Unreliable services	24	22	28	27	27	28
Strikes	23	22	25	24	28	22
Schoolchildren/youths behaving badly	21	21	21	21	19	23
Drunken passengers/being aggressive/ intimidation	21	20	23	21	25	20
Dirty environment on the bus/train	20	17	23	24	20	27
Frequency of the services	19	18	20	18	18	22
Concern about terrorist attacks	18	17	19	19	19	18
Concern about being a victim of crime on the bus/Tube/train (robbery, assault or pickpocketing)	14	13	16	17	18	13
Concern about being a victim of crime getting to and waiting for the bus/Tube/train (robbery, assault or pickpocketing)	14	13	16	17	18	14
Dirty environment getting to the bus train	14	12	18	20	14	21

As respondents could select more than one answer, totals may equal more than 100 per cent.

A qualitative research piece in 2015 found that the degree of integration (with mainstream society) impacts how widely people travel across London and can affect access to economic, social and leisure opportunities. The travel patterns of those Londoners who are less integrated/less confident tends to be more restricted, with a limited range of transport options and greater dependency on bus travel because it is seen as cheap, familiar and habitual. Those Londoners who are more integrated/ confident will travel more widely across the Capital and are confident using a wider range of transport options [31].

As well as more mainstream barriers like cost and concerns about safety, some BAME travellers evidently encounter cultural and language issues.

These can lead to reduced confidence, reduced access to information and consequently the ability for independent travel [31].

## 4.20 Safety and security

BAME Londoners are significantly less likely than white Londoners to say that they are ‘not at all worried’ about personal security (ie being safe from crime or antisocial behaviour) while using public transport: 16 per cent compared with 23 per cent). BAME Londoners are also more likely to report that they are worried (either ‘quite worried’ or ‘very worried’): 33 per cent say they are generally worried compared with 29 per cent of white Londoners. The level of worry rises to 40 per cent among Asian Londoners [13].

### Levels of concern about personal security when using public transport in London (2017/18) [13]

%	White	BAME	Mixed	Asian	Black
<b>Base</b>	<b>(4,245)</b>	<b>(1,830)</b>	<b>(345)</b>	<b>(824)</b>	<b>(553)</b>
Not at all worried	23	16	18	13	21
A little bit worried	43	44	47	40	47
Quite a bit worried	22	26	23	32	21
Very worried	6	7	5	8	5
NET(*): Worried	29	33	29	40	26
Don't know	4	6	6	7	6

\*Net is the total % of people who are worried

BAME Londoners are also considerably more likely than white Londoners to have felt worried about their personal security in the past three months while using public transport. Thirty-seven per cent have experienced a specific worrying incident in the past three months, compared with 30 per cent of white Londoners. This increases to 43 per cent of mixed ethnicity Londoners [13].

While the cause of worrying incidents in the past three months is broadly similar among BAME Londoners and white Londoners who experienced such events, there are certain incidents that BAME Londoners are more likely to have found worrying:

- The threat of terrorism was mentioned by 33 per cent of BAME Londoners compared with 27 per cent of white Londoners; rising to 38 per cent of black Londoners
- Fights/arguments between other passengers and staff was mentioned by 17 per cent of BAME Londoners compared with 14 per cent of white Londoners
- Hate crime was mentioned by 20 per cent of BAME Londoners compared with nine per cent of white Londoners



- Getting lost was mentioned by 10 per cent of BAME Londoners compared with six per cent of white Londoners [13]

Among those who experienced a worrying event, similar proportions of BAME and white Londoners took immediate action as a result. Forty-seven per cent of BAME Londoners took immediate action after the worrying incident (such as changing to another form of transport or stopping the journey altogether), as did 45 per cent of white Londoners. A significantly greater proportion of BAME Londoners said they changed transport mode as a result of feeling worried (32 per cent compared with 27 per cent of white Londoners). Moving transport rises to 35 per cent among mixed ethnicity Londoners [13].

The longer-term impact of worrying incidents is also similar among BAME and white Londoners. Sixteen per cent of BAME Londoners said they stopped travelling on the mode on which they experienced the worrying incident, either temporarily (12 per cent) or completely (three per cent). This is the same proportion for white Londoners (16 per cent) who were put off travelling by that mode either temporarily (11 per cent) or completely (four per cent) [13].

## 4.21 Unwanted sexual behaviour

A very similar proportion of BAME and white Londoners have experienced unwanted sexual behaviour while using public transport in the Capital in the past 12 months. Eleven per cent of BAME Londoners said they had personally experienced unwanted sexual behaviour compared with 10 per cent of white Londoners. However, this rises to 19 per cent of mixed Londoners. The mean number of incidents experienced in the past three months is largely similar among BAME Londoners (2.6 incidents on average) and white Londoners (2.7 incidents on average) but increases to 3.2 incidents on average among black Londoners [13].

### Experience of unwanted sexual behaviour when using public transport in past 12 months (2017/18) [13]

%	White	BAME	Mixed	Asian	Black
<b>Base</b>	<b>(4,245)</b>	<b>(1,830)</b>	<b>(345)</b>	<b>(824)</b>	<b>(553)</b>
Yes	10	11	19	9	10
No	88	85	76	86	88
Would rather not say	2	4	5	5	2

The types of unwanted sexual behaviour experienced by BAME Londoners and white Londoners are very similar. BAME Londoners are not significantly more likely than white Londoners to have experienced any form of unwanted sexual behaviour. The main types of incident experienced by BAME Londoners are:

- Staring (46 per cent of BAME Londoners compared with 44 per cent of white Londoners), rising to 59 per cent of mixed ethnicity Londoners

- Sexual comments (35 per cent of BAME Londoners compared with 35 per cent of white Londoners), rising to 50 per cent of mixed ethnicity Londoners
- Body rubbing (27 per cent of BAME Londoners compared with 20 per cent of white Londoners) [13]

The majority of those who experienced unwanted sexual behaviour did not report the incident to anyone. However, this is considerably more apparent among BAME Londoners with 74 per cent not reporting the incident compared with 64 per cent of white Londoners. BAME Londoners were significantly more likely than white Londoners to not report the incident because they did not know who to report it to (30 per cent compared with 21 per cent) [13].

## 4.22 Hate crime

BAME Londoners are significantly more likely than white Londoners to have experienced hate crime targeted at themselves or witnessed it in the past year (27 per cent compared with 19 per cent). The proportion rises to 32 per cent among mixed ethnicity Londoners [13].

### Experience of hate crime when using public transport in past 12 months (2017/18) [13]

%	White	BAME	Mixed	Asian	Black
<b>Base</b>	<b>(4,245)</b>	<b>(1,830)</b>	<b>(345)</b>	<b>(824)</b>	<b>(553)</b>
NET: Yes	19	27	32	25	26
Yes, targeted at me	6	7	8	7	7
Yes, targeted at someone else/others	14	21	27	19	21
No	78	67	63	67	71
Would rather not say	3	6	6	8	3

The type of behaviours experienced or witnessed are generally consistent among BAME and white Londoners, with the most common being verbal insults (mentioned by 72 per cent of BAME Londoners and 69 per cent of white Londoners), physical intimidation (33 per cent of BAME Londoners and 36 per cent of white Londoners) and spitting (mentioned by 16 per cent of both groups) [13].

However, there are some clear distinctions between BAME and white Londoners in the perceived motivation for incidents of hate crime experienced or witnessed on public transport in the past 12 months. BAME Londoners are significantly more likely than white Londoners to cite race/ethnicity (60 per cent compared with 49 per cent) or religion/belief as the perceived motivation for the incident (33 per cent compared with 26 per cent) [13].

As with incidents of unwanted sexual behaviour, hate crime tends to go unreported. Again, BAME Londoners are less likely than white Londoners to report such incidents (16 per cent compared with 22 per cent). The reasons

for not reporting hate crime incidents are broadly similar among both groups [13].

We conducted a review of social media content looking specifically at instances of discrimination experienced or witnessed on public transport. Our findings show that BAME Londoners face incidents of discrimination on the Capital’s network and talk about them to some extent on social media, with experiences typically being of an explicit nature in the form of verbal abuse. For incidents involving BAME Londoners, the discriminators were generally other customers or members of staff (including Taxi Private Hire drivers) [32].

### 4.23 Safety from accidents

BAME Londoners are less likely than white Londoners to say that they feel safe from accidents when walking around London during the day. Twenty-two per cent consider themselves very safe from accidents when walking around London during the day compared with 30 per cent of white Londoners. BAME Londoners are more likely to say that they feel unsafe from accidents when walking at night. Seventeen per cent feel not at all safe from accidents when walking around London at night, compared to eight per cent of white Londoners [33].

#### Feelings of safety from road accidents when walking around London (2018) [33]

%	All	White	BAME
<b>Base (walked in last year)</b>	<b>(951)</b>	<b>(731)</b>	<b>(214)</b>
<b>During the day:</b>			
Very safe	27	30	22
Quite safe	57	57	58
Not very safe	11	10	12
Not at all safe	3	2	5
Don't know	2	1	3
<b>During the night:</b>			
Very safe	11	12	10
Quite safe	48	50	46
Not very safe	24	25	22
Not at all safe	11	8	17
Don't know	5	5	6

BAME Londoners are slightly less likely than white Londoners to say that they feel safe from accidents when cycling either during the day or at night. Sixteen per cent of white Londoners compared to 11 per cent of BAME Londoners consider themselves very safe from accidents when cycling during the day, and 12 per cent of white Londoners compared to seven per cent of BAME Londoners feel very safe from accidents when cycling at night. [33].

## Feelings of safety from road accidents when cycling around London (2018) [33]

%	All	White	BAME
<b>Base (cycled in last year)</b>	<b>(314)</b>	<b>(254)</b>	<b>(59)</b>
<b>During the day:</b>			
Very safe	15	16	11
Quite safe	38	39	38
Not very safe	31	35	21
Not at all safe	13	9	23
Don't know	3	1	7
<b>During the night:</b>			
Very safe	11	12	7
Quite safe	33	35	31
Not very safe	28	29	26
Not at all safe	24	22	29
Don't know	4	3	8

People from more deprived areas, some minority ethnic groups, disabled people, children and older people experience the worst effects of road danger, noise and air pollution.

Main roads pass through some of the most deprived communities, creating environments that are not inclusive to all, with intimidating roads that are difficult to cross. People walking in London's most deprived areas are more than twice as likely to be injured as those in the least deprived areas. People aged between 20 and 29 years old are more likely to be killed or seriously injured than those in other age groups and the number of children killed or seriously injured in cars increased in 2016. BAME Londoners are more at risk, with children in this group being on average 1.5 times more likely to be killed or seriously injured on the roads than non-BAME children [91].

With a population of 8.7 million, the city is now larger than it has ever been and it is forecast to grow further: to 10.8 million by 2041. This is expected to generate more than six million additional trips each day so more journeys will need to be taken on foot, by bicycle or on public transport, the most sustainable forms of transport. London's population is also living longer. This means there will be a greater proportion of older people who are less able to cope with the physical impact of collisions.

These changes in London's population mean it is even more vital, and yet more challenging, to tackle road danger [Vision Zero action plan].

## 4.24 Customer satisfaction

### 4.24.1 Overall satisfaction

We measure overall satisfaction with various transport types in London on an 11-point scale, with 10 representing extremely satisfied and zero representing extremely dissatisfied. We then scale this up to 100.

We have standardised satisfaction ratings, which are shown in the table below. This allows us to apply consistent analysis across a wide range of satisfaction research.

Average rating	Level of satisfaction
Under 50	Very low/weak/poor
50-54	Low/weak/poor
55-64	Fairly/relatively/quite low/weak/poor
65-69	Fair/reasonable
70-79	Fairly/relatively/quite good
80-84	Good or fairly high
85-90	Very good or high
90+	Excellent or very high

All the transport types receive fairly good/high overall satisfaction mean ratings, and this is true across all ethnic groups.

While still good, BAME Londoners give lower overall satisfaction ratings compared with white Londoners. In general, older Londoners tend to be more satisfied with public transport. The greater proportion of older white Londoners than older BAME Londoners may explain some of the differences in ratings. However, for the transport types where sufficient data exists, younger BAME respondents still provide lower satisfaction ratings than younger white respondents, indicating that there is more to the differences than just age.

In particular, BAME Londoners rate private hire vehicles (both taxis and minicabs), London Overground and Dial-a-Ride lower than white Londoners [15].

**Overall satisfaction with transport types – all customers (2016/17) [15]**

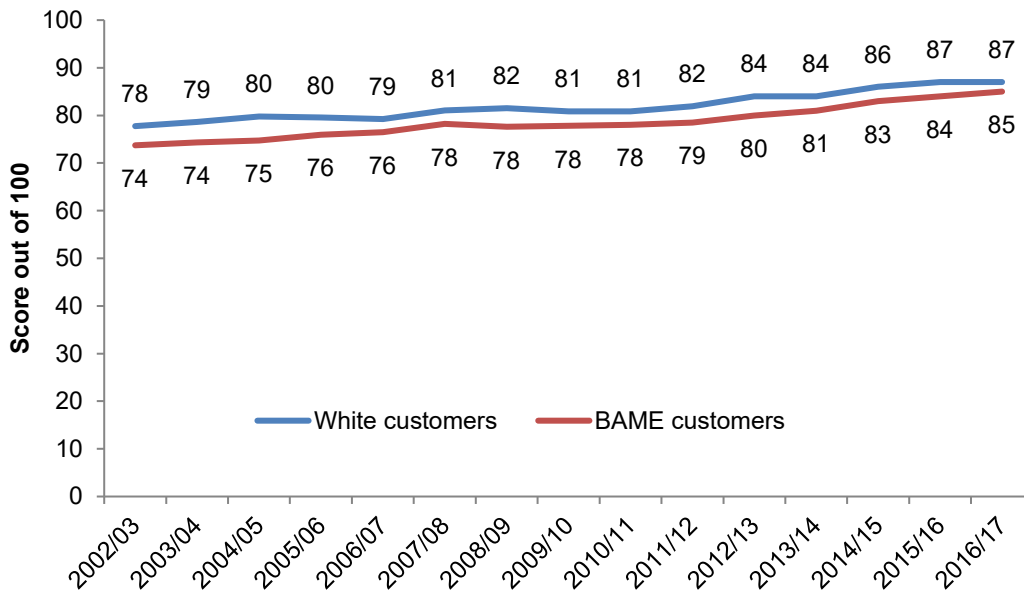
<b>Satisfaction score (0-100)</b>	<b>All</b>	<b>White</b>	<b>BAME</b>	<b>Black</b>	<b>Asian</b>	<b>Mixed</b>
<b>Bus services</b>						
Base	(13,032)	(8,603)	(4,293)	(1,794)	(1,731)	(603)
Satisfaction score	86	87	85	84	85	85
<b>TfL Rail</b>						
Base	(4,995)	(3,330)	(1,442)	(442)	(789)	(211)
Satisfaction score	83	85	81	81	81	83
<b>Night buses</b>						
Base	(769)	(471)	(270)	(145)	(77)	(48)
Satisfaction score	85	86	83	84	85	*
<b>Underground</b>						
Base	(16,947)	(12,668)	(4,181)	(1,039)	(2,050)	(1,092)
Satisfaction score	85	86	84	83	84	84
<b>Overground</b>						
Base	(13,209)	(8,914)	(3,630)	(1,316)	(1,452)	(862)
Satisfaction score	84	86	82	79	84	83
<b>DLR</b>						
Base	(12,243)	(7,756)	(3,958)	(1,371)	(1,587)	(1,000)
Satisfaction score	89	89	87	87	88	87
<b>Dial-a-Ride</b>						
Base	(1,457)	(1,021)	(397)	(168)	(192)	(37)
Satisfaction score	84	85	80	83	79	*
<b>London River Services</b>						
Base	(1,040)	(896)	(115)	(14)	(62)	(39)
Satisfaction score	90	90	89	*	90	*
<b>Private Hire Vehicles</b>						
Base	(448)	(327)	(107)	(28)	(45)	(34)
Satisfaction score	83	84	77	*	*	*
<b>Taxis (black cabs)</b>						
Base	(513)	(407)	(96)	(9)	(51)	(36)
Satisfaction score	84	85	80	*	81	*
<b>Trams</b>						
Base	(3,841)	(2,553)	(1,064)	(530)	(340)	(194)
Satisfaction score	90	91	89	90	89	88
<b>Victoria Coach Station</b>						
Base	(1,312)	(1,005)	(302)	(126)	(87)	(38)
Satisfaction score	81	82	79	77	78	*
<b>TfL Road Network (TLRN)</b>						
Base	(9,592)	(7,500)	(2,092)	(581)	(778)	(733)
Satisfaction score	69	69	69	73	70	66

\*Denotes small base size (data not shown in this report for base sizes of less than 50).

### 4.24.2 Bus

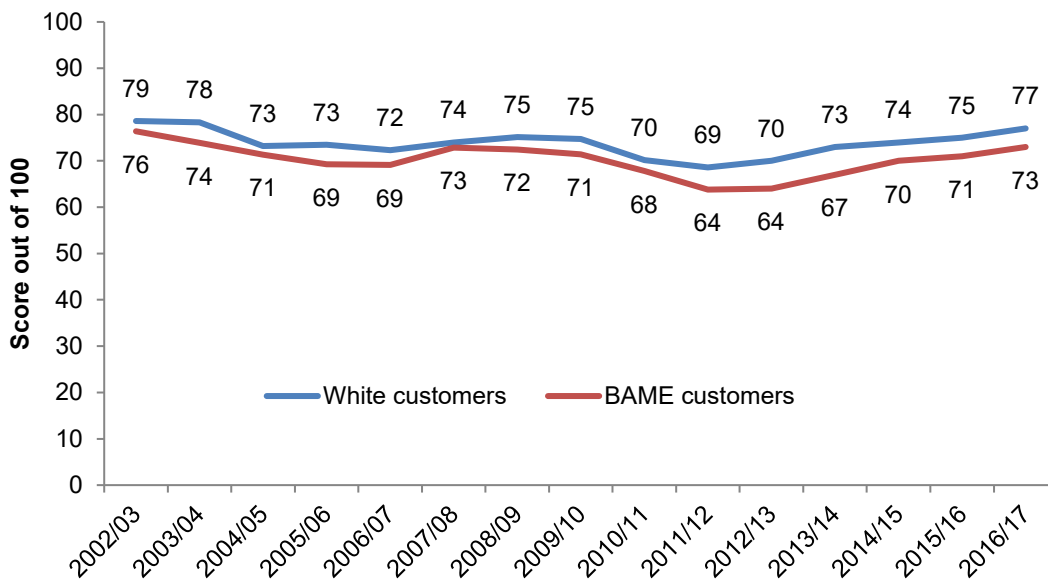
Overall, Londoners' satisfaction with buses is fairly high at 86 out of 100 in 2016/17. BAME bus users are slightly less satisfied with the service overall compared to white Londoners (85 out of 100 BAME; 87 out of 100 white). Satisfaction with buses has seen a steady increase among both BAME and white Londoners [15].

#### Overall satisfaction with buses over time [15]



Satisfaction with value for money on buses, as with other types of transport, is lower than overall satisfaction. BAME customers rate value for money slightly lower than white customers (73 out of 100 compared with 77 out of 100). Looking at the trend over time, satisfaction with value for money does appear to have improved steadily since 2011/12 [15].

### Value for money satisfaction with buses over time [15]



### Drivers of satisfaction

The main drivers of satisfaction with buses are similar for both BAME and white customers and tend to relate to journey times, the ease of making the journey and comfort inside the bus. Satisfaction ratings given by BAME customers are also likely to be driven by the smoothness from jolting and the sense of safety and security at stops and shelters [15].

### Drivers of satisfaction for bus users (2015/16) [15]

White customers	BAME customers
Ease of making journey	Journey time
Journey time	Smoothness and freedom from jolting
Time waited to catch bus	Ease of making journey
Comfort inside the bus	Comfort inside the bus
Driver approachability and helpfulness	Safety and security at stops and shelters

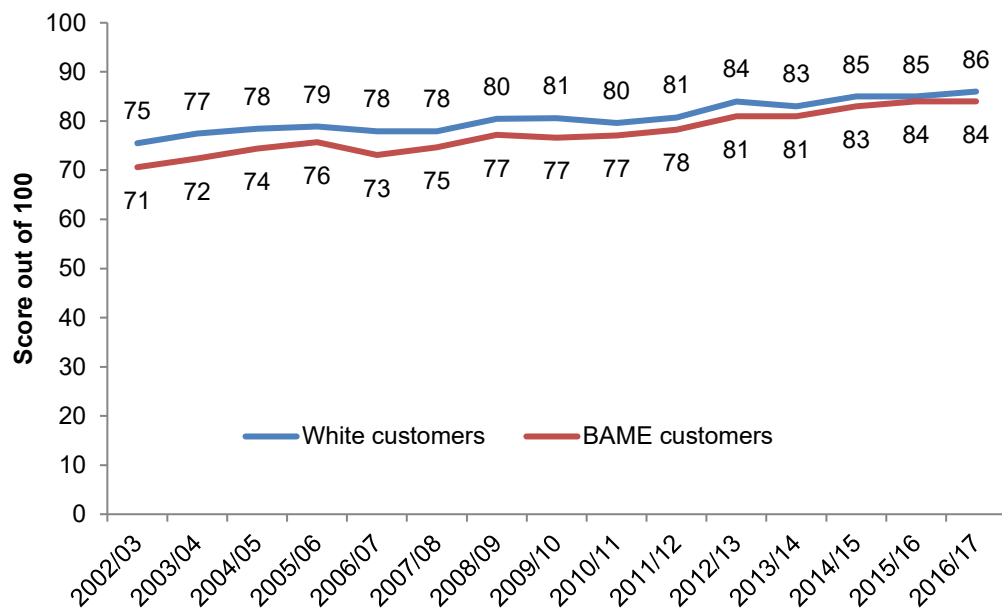


### 4.24.3 Tube

Overall satisfaction with the Tube is fairly high among all customers (85 out of 100). BAME Tube users are slightly less satisfied than white customers (84 out of 100 compared with 86 out of 100) [15].

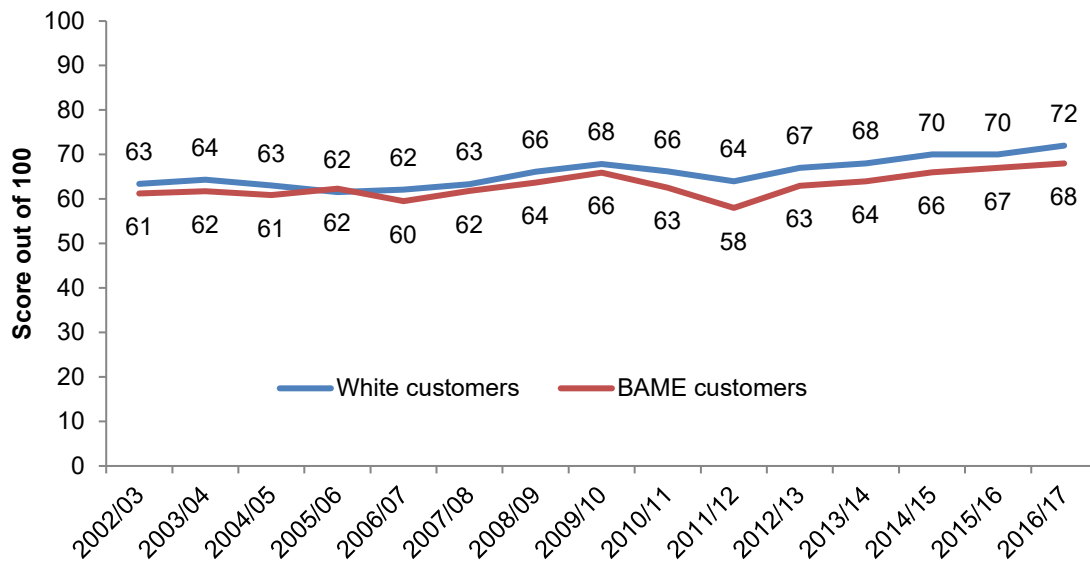
The long-term trend of overall satisfaction with the Tube has increased for both BAME and white customers but is still slightly lower overall for BAME customers than for white customers [15].

#### Overall satisfaction with the Tube over time [15]



Satisfaction with value for money on the Tube is fairly good among customers overall (71 out of 100). Levels of satisfaction with value for money on the Tube are lower for BAME customers than white customers (68 out of 100 compared with 72 out of 100) [15].

## Value for money satisfaction with the Tube over time [15]



## Drivers of satisfaction

The top three drivers of satisfaction with the Tube are ease of making journeys, comfort on the journey and length of the journey. These top three reasons are the same for BAME and white Londoners [15].

## Drivers of satisfaction for Tube users [15]

White customers	BAME customers
Ease of making journey	Ease of making journey
Comfort of journey	Comfort of journey
Length of journey time	Length of journey time
Train crowding	Personal safety on train
Length of time waiting for train	Smoothness of journey

#### 4.24.4 Overground

Overall satisfaction among all customers using the Overground is fairly high at 84 out of 100. Among BAME customers of the Overground, overall satisfaction is slightly lower at 82 out of 100 [15].

#### Overall satisfaction with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	White	BAME	Black	Asian	Mixed
<b>Base 2016/17</b>	<b>(13,209)</b>	<b>(8,914)</b>	<b>(3,630)</b>	<b>(1,316)</b>	<b>(1,452)</b>	<b>(862)</b>
2009/10	73	74	72	71	73	70
2010/11	80	82	79	78	78	80
2011/12	82	83	80	78	80	80
2012/13	82	83	80	79	81	79
2013/14	82	83	79	77	80	79
2014/15	83	84	81	79	82	84
2015/16	84	85	82	81	82	83
2016/17	84	86	82	79	84	83

Overall satisfaction with value for money on the Overground is 73 out of 100. BAME Londoners are slightly less satisfied than white Londoners (72 out of 100 compared with 74 out of 100) [15].

#### Satisfaction with value for money with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	White	BAME	Black	Asian	Mixed
<b>Base 2016/17</b>	<b>(12,491)</b>	<b>(8,627)</b>	<b>(3,588)</b>	<b>(1,296)</b>	<b>(1,441)</b>	<b>(851)</b>
2011/12	72	73	69	67	70	70
2012/13	71	79	69	69	71	65
2013/14	70	71	68	67	69	68
2014/15	73	72	73	73	73	74
2015/16	73	73	72	71	74	71
2016/17	73	74	72	70	75	71

#### Drivers of satisfaction

Ease of making a journey, the comfort of trains, provision of information and feeling valued as a customer are the main drivers of satisfaction for white and BAME customers in relation to overall satisfaction with London Overground.

## Drivers of satisfaction for Overground users [15]

White customers	BAME customers
Ease of making journey	Ease of making your journey
Feel valued as a customer	Feel valued as a customer
Information about service disruptions on the train	Comfort of train
Train running on time	Information about service disruptions on the train
Comfort of train	Your personal safety

### 4.24.5 Docklands Light Railway

Overall satisfaction with the DLR is high among customers using the network at 89 out of 100. There is little difference between BAME and white users of the DLR (87 out of 100 BAME compared to 89 out of 100 white) [15].

#### Overall satisfaction with DLR over time – all customers [15]

Satisfaction score (0-100)	All	White	BAME	Black	Asian	Mixed
<b>Base 2016/17</b>	<b>(12,243)</b>	<b>(7,756)</b>	<b>(3,958)</b>	<b>(1,371)</b>	<b>(1,587)</b>	<b>(1,000)</b>
2009/10	81	82	79	79	80	78
2010/11	81	83	80	80	79	81
2011/12	82	84	81	81	81	82
2012/13	87	87	86	85	87	86
2013/14	87	88	85	85	86	85
2014/15	89	89	88	87	88	87
2015/16	89	89	88	88	88	87
2016/17	89	89	87	87	88	87

Overall satisfaction with value for money on the DLR is quite good (79 out of 100), but it is slightly lower for BAME customers than white customers (78 out of 100 compared to 80 out of 100) [15].

#### Satisfaction with value for money with DLR over time – all customers [15]

Satisfaction score (0-100)	All	White	BAME	Black	Asian	Mixed
<b>Base 2016/17</b>	<b>(11,554)</b>	<b>(7,492)</b>	<b>(3,897)</b>	<b>(1,354)</b>	<b>(1,564)</b>	<b>(979)</b>
2011/12	72	74	70	70	70	70
2012/13	74	75	72	73	71	71
2013/14	75	76	73	74	74	70
2014/15	77	78	76	76	76	76
2015/16	78	78	76	77	77	75
2016/17	79	80	78	79	78	78

#### Drivers of satisfaction

Among both BAME and white DLR customers the drivers of satisfaction are similar, relating to comfort

, journey time reliability and ease of making journeys [15].

## Drivers of satisfaction for DLR users [15]

White customers	BAME customers
Ease of making journey	Comfort inside the train
Reliability of trains	Length of time journey took
Comfort inside the train	Ease of getting on the train
Length of time journey took	Ease of making journey
Length of time you waited for the train	Reliability of trains

### 4.24.6 Trams

Overall satisfaction with trams is high among customers at 90 out of 100. This is slightly lower among BAME users than white tram customers (89 out of 100 compared with 91 out of 100) [15].

#### Overall satisfaction with trams over time – all customers [15]

Satisfaction score (0-100)	All	White	BAME	Black	Asian	Mixed
<b>Base 2016/17</b>	<b>(3,841)</b>	<b>(2,553)</b>	<b>(1,064)</b>	<b>(530)</b>	<b>(340)</b>	<b>(194)</b>
2009/10	86	87	86	84	*	*
2010/11	85	86	84	83	83	87
2011/12	86	87	84	83	84	*
2012/13	89	90	87	87	88	87
2013/14	89	90	88	88	89	89
2014/15	89	90	88	88	89	88
2015/16	90	91	89	88	90	90
2016/17	90	91	89	90	89	88

\*Denotes small base size (percentages not shown in this report for base sizes of less than 50).

Overall satisfaction with value for money on the tram network is good (82 out of 100) but it is slightly lower for BAME customers than white customers (80 out of 100 compared to 83 out of 100) [15].

## Satisfaction with value for money with trams over time – all customers [15]

Satisfaction score (0-100)	All	White	BAME	Black	Asian	Mixed
<b>Base 2016/17</b>	<b>(2,415)</b>	<b>(1,542)</b>	<b>(848)</b>	<b>(420)</b>	<b>(270)</b>	<b>(158)</b>
2011/12	73	75	70	69	73	*
2012/13	77	79	75	77	73	73
2013/14	78	79	77	77	77	79
2014/15	78	79	77	77	77	77
2015/16	79	81	77	78	77	77
2016/17	82	83	80	79	79	82

\*Denotes small base size (percentages not shown in this report for base sizes of less than 50).

### 4.24.7 Streets

BAME Londoners were significantly less satisfied than white Londoners in terms of their last journey on foot or while cycling. There is little difference in satisfaction in relation to their last car journey [33].

#### Overall satisfaction with streets and pavement after last journey over time – walking journey [33]

Satisfaction score (0-100)	All	White	BAME
<b>Base 2018</b>	<b>(951)</b>	<b>(731)</b>	<b>(214)</b>
2017	69	68	71
2018	69	71	65

#### Overall satisfaction with streets and pavements after last journey over time - car journey [33]

Satisfaction score (0-100)	All	White	BAME
<b>Base 2018</b>	<b>(870)</b>	<b>(668)</b>	<b>(196)</b>
2017	63	62	65
2018	63	64	61

#### Overall satisfaction with streets and pavements after last journey over time - cycling journey [33]

Satisfaction score (0-100)	All	White	BAME
<b>Base 2018</b>	<b>(314)</b>	<b>(254)</b>	<b>(59)</b>
2017	64	63	65
2018	66	69	62

#### 4.24.8 Transport for London Road Network (TLRN)

Satisfaction with the TLRN is reasonable to fairly good. BAME users of the TLRN give a score of 68 out of 100 for walking, 66 out of 100 for cycling, 72 out of 100 for travelling by bus on red routes and 69 out of 100 for driving. Black TLRN users tend to be happier compared with other BAME groups, with mixed ethnicity users the least satisfied across each form of transport [15].

#### Overall satisfaction – general impression of red routes over time [15]

Satisfaction score (0-100)	All	White	BAME	Black	Asian	Mixed
<b>Walking</b>						
Base 2016-17	(3,432)	(2,623)	(809)	(237)	(312)	(260)
2013/14	70	70	70	74	73	63
2014/15	68	68	68	65	71	65
2015/16	68	68	68	71	69	64
2016/17	68	68	68	71	70	64
<b>Travelling by bus</b>						
Base 2016-17	(1,375)	(1,017)	(358)	(129)	(122)	(107)
2013/14	69	69	72	74	71	69
2014/15	71	70	71	73	72	68
2015/16	72	72	69	70	71	66
2016/17	72	72	71	72	71	68
<b>Driving</b>						
Base 2016-17	(2,286)	(1,903)	(383)	(84)	(165)	(134)
2013/14	67	67	66	70	66	65
2014/15	67	67	66	70	65	63
2015/16	70	70	69	70	70	67
2016/17	69	69	66	74	65	63
<b>Cycling</b>						
Base 2016-17	(1,048)	(822)	(226)	(61)	(65)	(100)
2013/14	69	68	72	*	*	*
2014/15	70	70	72	75	74	66
2015/16	64	64	67	71	68	63
2016/17	66	65	70	76	69	67

\*Denotes small base size (data not shown in this report for base sizes of less than 50).

## 4.25 Access to information

### 4.25.1 Information needs

For some BAME Londoners language can be a significant barrier to public transport use, especially among people who were not born in the UK. Cultural and language issues can reduce confidence and access to information, thereby limiting the extent to which people make unfamiliar journeys and their ability to travel independently [26].

#### Access to the internet

Looking solely at online Londoners, BAME are more likely than white to access the internet in certain places:

- Ninety per cent of BAME Londoners access the internet 'on the move', compared with 76 per cent of white Londoners
- Seventy-five per cent of BAME Londoners access the internet at work, compared with 61 per cent of white Londoners [14]

#### Access to the internet among ethnic groups (autumn 2017/spring 2018) [14]

%	All	White	BAME	White 16-64	BAME 16-64
Base (online Londoners)	(2,062)	(1,472)	(563)	(1,177)	(541)
Access at home	100	100	100	100	100
Access 'on the move'	81	76	90	85	91
Access at work	66	61	75	72	77

As respondents could select more than one answer, totals may equal more than 100 per cent.

Across all ethnic groups there is a wide range of different uses for the internet. While most of these are common across ethnic groups, there are several differences in the proportion of Londoners in each ethnic group undertaking specific tasks.

From our research of travel-related internet use, we found that the main difference is in using the internet for accessing live public transport information. Online BAME Londoners more likely than online white Londoners to use the internet for this purpose (86 per cent compared with 80 per cent). Also for making day-to-day travel plans (73 per cent compared with 70 per cent) [14].

### 4.25.2 Mobile device usage and online behaviour

BAME online Londoners are more likely than white online Londoners to use smartphones to access the internet (94 per cent compared with 79 per cent).



This is driven largely by reduced ownership among online white Londoners aged 16-64 [14].

**Proportion of Londoners who use a smartphone to access the internet (iPhone, BlackBerry, Android, other) (autumn 2017/spring 2018) [14]**

%	Base	Smartphone usage to access the internet
All online Londoners	(2,062)	84
Online white Londoners	(1,472)	79
Online BAME Londoners	(563)	94
16-24 year-old online white Londoners	(108)	97
16-24 year-old online BAME Londoners	(131)	95
16-64 year-old online white Londoners	(1,177)	87
16-64 year-old BAME Londoners	(541)	95

As respondents could select more than one answer, totals may equal more than 100 per cent.

We have found a greater proportion of BAME online Londoners use social media channels compared with white online Londoners [14]:

- Facebook (80 per cent compared with 73 per cent)
- Twitter (59 per cent compared with 45 per cent)
- YouTube (94 per cent compared with 78 per cent)
- Instagram (65 per cent compared with 40 per cent)
- Google+ (53 per cent compared with 35 per cent)
- Snapchat (52 per cent compared with 26 per cent)

#### 4.25.3 Use of the TfL website

BAME online Londoners are more likely than white online Londoners to have used the TfL website (92 per cent compared with 87 per cent). Daily use among BAME online Londoners is almost twice as common compared to white online Londoners (38 per cent compared to 21 per cent) [14].

#### Proportion of Londoners who visit tfl.gov.uk (autumn 2017/spring 2018) [14]

%	All	White	BAME
<b>Base (online Londoners)</b>	<b>(2,062)</b>	<b>(1,472)</b>	<b>(563)</b>
Any	89	87	92
Daily	27	21	38
Up to 3-4 times a week	17	17	19
Up to 3-4 times a month	20	23	14
About once a month	11	12	9
Less than once a month	14	15	11
Never	11	13	8

BAME online Londoners are more likely than white online Londoners to use the TfL website for ticketing (34 per cent compared with 28 per cent) or for budgeting purposes (24 per cent compared with 16 per cent). Very similar proportions of BAME and white online Londoners use the TfL website for journey planning, viewing maps, or for gathering information about roads or cycling [14].

#### Reasons for visiting the TfL website (autumn 2017/spring 2018) [14]

%	White	BAME
<b>Base (online Londoners)</b>	<b>(1,472)</b>	<b>(563)</b>
Journey planning	76	76
Ticketing (information and buying)	28	34
Viewing maps	29	29
Budgeting	16	24
Information about roads	12	13
Information about cycling	4	4

As respondents could select more than one ticket type, totals may equal more than 100 per cent.

These ticket options were available at the time of the survey but may have changed since. The latest ticketing information is available at [tfl.gov.uk/fares/](http://tfl.gov.uk/fares/)

#### 4.25.4 Accessing information in the event of travel disruption

The proportion of internet users stating that they obtain real-time travel information from the TfL website is similar between BAME and white Londoners (66 per cent BAME compared to 64 per cent white). Most other

online channels (such as other websites, apps and Twitter feeds) are more likely to be used by BAME than by white Londoners [14].



## 5 Gender

### Key findings

- According to the 2011 Census, 51 per cent of Londoners are women [2]
- Women tend to complete more weekday trips on average than men (2.5 compared to 2.3) [11]
- Walking is the most commonly used type of transport by women (95 per cent walk at least once a week). Women are more likely to use buses than men (62 per cent compared with 56 per cent), but are less likely to use other types of transport including the Tube (38 per cent women compared with 43 per cent men) [11]
- Women are more likely than men to be travelling with buggies and/or shopping, and this can affect transport choices [34]
- Satisfaction with transport among women and men is very similar and is mainly driven by the ease of making the journey [15]
- Women are more likely than men to experience worrying incidents when travelling on public transport and are more likely to be deterred from using public transport more often by a number of different barriers [13]
- Use of the TfL website is equally high among women and men (both 89 per cent) [14]

## 5.1 Summary – Gender

### 5.1.1 Profile of women in London

In line with the rest of England and the UK, 51 per cent of Londoners are women. There is little variation across the London boroughs in terms of the split between women and men; only the City of London, Newham and Tower Hamlets see any sizeable difference from the average across the Capital (45 per cent of City of London residents and 48 per cent of Newham and Tower Hamlets residents are women) [2].

The key demographic differences between women and men are employment status and household income. Thirty-seven per cent of women are not working or are retired, with a further 14 per cent employed part-time (compared to 21 per cent and six per cent of men respectively) [11]. Women are also more likely to be the primary carer of children at home. Both factors appear to influence the travel behaviour and attitudes of women in London.

### 5.1.2 Transport behaviour

Women make a greater number of journeys per weekday than men. Trips made by women tend to be shorter [11].

- Women are more likely than men to use the bus at least once a week (63 per cent compared with 56 per cent) and are less likely to travel by Tube at least once a week (38 per cent compared with 43 per cent) [11]. Women are also less likely than men to cycle in London (13 per cent compared with 22 per cent) [16]
- Women are less likely than men to drive at least once a week (33 per cent compared with 42 per cent). However, they are more likely to be a car passenger (51 per cent compared with 37 per cent of men) [11]
- Women are less likely than men to be employed full or part-time, and this is reflected in the smaller proportion of journeys that are made for work purposes (25 per cent compared with 38 per cent) [11]
- A higher proportion of journeys made by women are for shopping/personal business than men (25 per cent compared with 18 per cent) [11]
- Women are almost equally likely as men to use Oyster pay as you go to travel (53 per cent of women compared with 52 per cent of men) [30]

### 5.1.3 Barriers

The reasons that men and women give as barriers to using public transport are often similar. The most commonly mentioned barriers for both are overcrowded services, the cost of travel and service disruptions. There are a number of aspects, however, that are significantly more likely to deter more women than men from using public transport more often [13].

Personal safety is a concern for some women. While 28 per cent of men say they are 'not at all worried' about their personal security (ie being safe from

crime or antisocial behaviour) on public transport, women are half as likely to be 'not at all worried' (14 per cent). Conversely, women (34 per cent) are much more likely than men (27 per cent) to be 'worried' (either 'quite' or 'very'). Furthermore, a significantly greater proportion of women had experienced a specific worrying incident in the past three months (37 per cent, compared with 28 per cent of men) [13].

Fourteen per cent of women report experiencing some form of unwanted sexual behaviour while travelling in London in the previous year (the equivalent figure for men is six per cent). However, the current research indicates that unwanted sexual behaviour experienced by men tends to be of a more serious nature, which may help to explain why men are more likely than women to have reported such incidents. Indeed, 41 per cent of women who experienced an incident of unwanted sexual behaviour did not report it because they felt it was not serious enough [13].

Women (of all ages) are less likely than men to use unbooked minicabs, with 15 per cent claiming they are likely to do so in future compared to 23 per cent of men [35]

#### **5.1.4 Customer satisfaction**

We measure overall satisfaction with various transport types in London on an 11-point scale, with 10 representing extremely satisfied and zero representing extremely dissatisfied. We then scale this up to 100.

Women are generally satisfied with public transport in London and report very similar satisfaction levels to men [15].

- Among women using the bus, overall satisfaction is high (86 out of 100) and is mainly linked to the ease of making a journey and journey time
- Overall satisfaction with the Tube is also high at 86 out of 100. This is linked to the ease of making journeys, comfort and length of journey time
- Overall satisfaction with both the Tube and bus has increased considerably from 2002/03 to 2016/17. Satisfaction among women who use the bus has increased from 76 to 86 out of 100 and for the Tube from 75 to 86 [15]

#### **5.1.5 Access to information**

- Use of the TfL website is high among online women and online men (both 89 per cent) [14]
- Online women are just as likely as online men to access the internet at home and 'on the move'. However, they are less likely to access the internet at work (62 per cent compared to 70 per cent of online men), likely linked to differences in employment patterns [14]

Online women and online men tend to use the TfL website for similar reasons, the most common being journey planning (77 per cent of online women and 75 per cent of online men). However, online women are less likely than online men to use the TfL website for gathering information about

roads (10 per cent, compared with 14 per cent) or about cycling (two per cent, compared with six per cent) [14].

## 5.2 Introduction

## 5.3 Profile of women in London

Fifty-one per cent of Londoners are women, which is the same split as across England as a whole [2].

### Gender profile of Londoners 2011 Census [2]

%	Proportion of Londoners
Men	49
Women	51

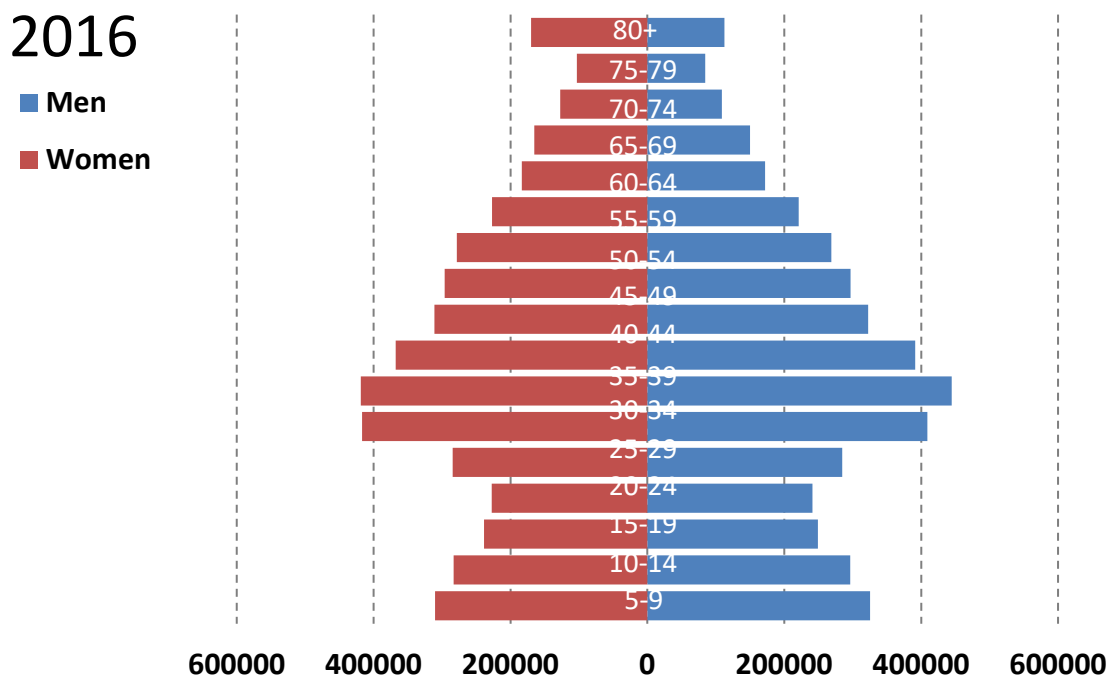
London has a much younger age profile than England as a whole, with 52 per cent of the city's population aged under 34, compared to 44 per cent across England. This younger age profile is seen for both women and men [2].

## Age profile of women and men in London and England (2011) [2]

Age groups	% of total London/England population		
	All	Men	Women
<b>London</b>			
0-34	52	26	26
35-54	28	14	14
55+	20	9	11
<b>England</b>			
0-34	44	22	22
35-54	28	14	14
55+	28	13	15

Base size not shown, as data are based on ONS Census data.

Women and men make up a roughly equal proportion of each age group until around 80 years of age. Londoners over 80 are much more likely to be women than men (see population pyramid) [2].



Reflecting the fact that more older Londoners are women than men, women are marginally more likely than men to be disabled (10 per cent of London's women are disabled, compared with eight per cent of men, and 56 per cent of disabled Londoners are women). Similarly, women are more likely than men to be retired (17 per cent of women are retired compared with 13 per cent of men, and 57 per cent of retired Londoners are women) [11].



Within this document there are two main sources of demographic data: the ONS Census and the LTDS. The following table shows the demographic breakdown of Londoners recorded in the LTDS.



## LTDS demographic profile of women and men in London (2016/17) [11]

%	Men	Women	Proportion of category that are women
<b>Base</b>	<b>(8,450)</b>	<b>(9,110)</b>	<b>(varies)</b>
<b>Age</b>			
5-10	9	9	49
11-15	6	5	47
16-24	13	12	50
25-59	57	55	50
60-64	4	5	53
65-70	5	6	54
71-80	4	5	55
81+	2	3	58
<b>Ethnicity</b>			
White	62	61	50
BAME	36	38	51
<b>Household income</b>			
Less than £10,000	11	14	57
£10,000–£19,999	15	17	54
£20,000–£34,999	20	20	50
£35,000–£49,999	15	14	48
£50,000–£74,999	15	14	49
£75,000+	24	21	47
<b>Working status*</b>			
Working full-time	64	41	40
Working part-time	6	14	69
Student	8	8	50
Retired	13	17	57
Not working	8	20	71
<b>Disabled</b>			
Yes	8	10	56
No	92	90	50
<b>Impairment affects travel</b>			
Yes	7	9	58
No	93	91	50

\*LTDS data in this report excludes children aged under five and working status does not include under-16s. All TfL surveys use the Equality Act 2010 to define disabled people as those who define themselves as having a long-term physical

or mental disability or health issue that impacts on their daily activities, the work they can do, or limits their ability to travel.

The proportion of Londoners who are white and who are BAME is very similar for women and men. However, looking at specific ethnic groups in London, there are some differences by gender. For example, 51 per cent of white Londoners are women compared to 43 per cent of Arab Londoners [2].

**Proportion of women living in London by detailed ethnic group [2]**

<b>Ethnic group</b>	<b>% Women</b>
All	51
<b>White: Total</b>	51
English/Welsh/Scottish/Northern Irish/British	50
Irish	52
Gypsy or Irish Traveller	52
Other white	52
<b>Mixed/multiple ethnic group: Total</b>	51
White and black Caribbean	52
White and black African	51
White and Asian	49
Other mixed	52
<b>Asian/Asian British: Total</b>	50
Indian	49
Pakistani	47
Bangladeshi	49
Chinese	54
Other Asian	51
<b>Black/African/Caribbean/black British: Total</b>	53
African	53
Caribbean	56
Other black	50
<b>Other ethnic group: Total</b>	47
Arab	43
Any other ethnic group	49

## 5.4 Employment and income

Differences exist between women and men in terms of employment and household income. Higher proportions of women say that they are currently not employed (20 per cent of women compared with eight per cent of men) and 71 per cent of Londoners aged 16 or over and not employed are women. More women than men are employed part-time (14 per cent of women compared with six per cent of men) and 70 per cent of Londoners working part-time are women [11].

Women are more likely than men to have a low household income. Thirty-one per cent of women have an income of less than £20,000 per year compared with 26 per cent of men. This may be linked to the higher proportion of women being in part-time employment, retired or not working [11].

Women get paid less than men on average. The median salary in 2016 for a woman in London was £26,277 compared with £36,761 for men. This is partly owing to the increased number of part-time positions occupied by women. Women occupy 70 per cent of part-time positions in the Capital. However, even when looking solely at full-time salaries there is still a discrepancy in the average annual pay for women and men; the median full-time annual pay for a woman in London is £32,151 compared with £39,927 for a man [36].

The employment rate of women is affected by child dependency. Employment rates (noted in 2010) decline steadily from 78 per cent of women with no dependent children to 22 per cent of women with four or more dependent children [37]. These family commitments also change the way in which women use public transport, affecting their travel patterns and behaviour.

## 5.5 London boroughs

We found few differences in the split between women and men across London's boroughs. The City of London has the lowest proportion of women; within the City only 45 per cent of residents are women. Newham and Tower Hamlets also have a lower than average proportion of women, both with 48 per cent. All other boroughs lie within two percentage points of the London average [2].

## 5.6 Travel behaviour

On average, women in London take a greater number of trips on a weekday than men (2.5 women compared with 2.3 men) [11].

The difference in the number of trips made by women and men changes with age. Women aged 65 and older take fewer trips than men of the same age [11]

### Average number of weekday trips (2016/17) [11]

Age groups	Men	Women	Difference
All	2.3	2.5	0.2
Under-16s	2.1	2.2	0.1
16-24	1.9	2.1	0.2
25-64	2.5	2.7	0.2
65+	2.2	2.0	0.2

Base: Men all 5,889; under 16, 851; 16-24,680; 25-64, 3,490; 65+, 868; Women all 6,367; under 16, 822; 16-24, 702; 25-64, 3,784; 65+, 1,059. LTDS data in this report excludes children aged under five.

## 5.7 Transport types used

The three most common transport types used by women at least once a week are walking (95 per cent), bus (63 per cent) and car as a passenger (51 per cent). The most common transport types used at least once a week by men are also walking (95 per cent) and bus (56 per cent). However, the third most commonly used type of transport for men is the Tube (43 per cent) [11].

There are some marked differences in the types of transport that women and men living in London use at least once a week. Women are more likely than men to travel by bus at least once a week (63 per cent of women compared with 56 per cent of men), which is a pattern that we see across age groups.

- Eighty per cent of women aged 16-24 use the bus at least once a week compared with 72 per cent of men
- Although the proportion of women and men aged 65 and over who use the bus at least once a week is relatively similar (66 per cent of women compared to 63 per cent of men) the higher number of women in this age group increases the proportion of bus users who are women aged 65 or over [11]

Women living in London are less likely than men to use the Tube at least once a week (38 per cent women compared with 43 per cent men). This is mainly driven by a reduction in older women using the Tube. Women aged 65 and over are substantially less likely to use the Tube at least once a week than men of the same age group (25 per cent women compared with 31 per cent of men), although this has increased from 19 per cent of women in 2013/14 [11].

Women aged 17 or over who are living in London are less likely than men to have a full driving licence (58 per cent compared with 72 per cent) or have access to a car (63 per cent of all women compared with 66 per cent of all men). These factors are likely to be related to the frequency of car use as a driver that we have observed. Women are more likely to travel by car at least once a week as a passenger than men (51 per cent of women compared with 37 per cent of men) and in turn are less likely to travel by car as a driver at least once a week than men (33 per cent of women compared with 42 per cent of men) [11].

The likelihood of using a range of transport is very similar between women and men. This includes the likelihood of walking (95 per cent of women and 95 per cent of men), use of the Overground (11 per cent of women compared with 13 per cent of men), the DLR (four per cent of women compared with six per cent of men), black cabs (two per cent of women compared with three per cent of men), minicabs (both six per cent) and the tram (both two per cent) [11].

### Proportion of Londoners using types of transport at least once a week (2016/17) [11]

%	Men	Women	16-24		25-64		65+	
			M	W	M	W	M	W
Walking	95	95	96	96	95	96	89	86
Bus	56	63	72	80	51	60	63	66
Car (as a driver)	42	33	17	14	55	45	57	32
Tube	43	38	49	56	51	43	31	25
Car (as a passenger)	37	51	46	51	28	47	30	50
National Rail	18	15	19	20	22	18	14	10
Overground	13	11	16	14	15	13	7	6
London taxi/black cab	3	2	2	2	4	3	2	3
Other taxi/minicab (Private Hire Vehicle)	10	10	13	16	11	11	5	6
DLR	6	4	7	2	7	5	2	1
Motorbike	2	-	1	-	2	-	1	0
Tram	2	2	3	3	2	2	2	2

Base size: Men 8,450; women 9,110; men 16-24, 955; men 25-64, 4,988; men 65+, 1,231; women 16-24, 1,015; women 25-64, 5,444; women 65+, 1,460. LTDS data in this report excludes children aged under five.

As respondents could select more than one answer, totals may equal more than 100 per cent.

Where there is more detailed information on individual types of transport, we have included a sub-section.

## 5.8 Walking

Ninety-five per cent of women walk at least once a week and 83 per cent walk five or more days a week. Walking frequency is very similar for women and men [11].

### Frequency of walking (2016/17) [11]

%	Men	Women
<b>Base</b>	<b>(8,450)</b>	<b>(9,110)</b>
5 or more days a week	84	83
3 or 4 days a week	5	6
2 days a week	4	3
1 day a week	3	2
At least once a fortnight	-	-
At least once a month	1	1
At least once a year	-	-
Not used in the past year	1	1
Never used	3	2

LTDS data in this report excludes children aged under five.

Women are less likely than men to walk a child to school at least once a week (29 per cent compared with 35 per cent of men) and less likely than men to walk to visit pubs/restaurants/cinemas and other social places (52 per cent of women compared with 62 per cent of men).

Conversely, women are more likely than men to walk to complete small errands such as getting a newspaper or posting a letter (81 per cent of women compared with 76 per cent of men) [18].

### Walking at least once a week by purpose of journey (2018) [18]

% who walk at least once a week	Men	Women
<b>Base</b>	<b>(472)</b>	<b>(474)</b>
• To complete small errands such as getting a newspaper or posting a letter	76	81
• As part of a longer journey	69	68
• To get to work/school/college	47	52
• To visit friends and relatives	51	52
• To visit pubs/restaurants/cinemas and other social places	62	52
• To take a child to school	35	29

As respondents could select more than one answer, totals may equal more than 100 per cent.

## 5.9 Bus

The bus is the second most frequently used type of transport (after walking) among women with approaching two-thirds (63 per cent) using the bus at least once a week. This is higher than among men where 56 per cent use the bus at least weekly [11].

### Frequency of travelling by bus (2016/17) [11]

%	Men	Women
<b>Base</b>	<b>(8,450)</b>	<b>(9,110)</b>
5 or more days a week	25	28
3 or 4 days a week	10	13
2 days a week	10	12
1 day a week	10	11
At least once a fortnight	7	7
At least once a month	10	9
At least once a year	16	12
Not used in last year	7	5
Never used	4	3

LTDS data in this report excludes children aged under five.

The most recent bus user research shows that daytime bus use among women is higher than that of men (57 per cent of bus users are women and 43 per cent are men). On night buses however, most customers are men (64 per cent are men and 36 per cent are women) [27].

### Comparison of day and night bus users (2014) [27]

%	Men	Women	Men	Women	Men	Women
<b>Base</b>	<b>(21,084)</b>	<b>(23,622)</b>	<b>16-24</b>	<b>16-24</b>	<b>25+</b>	<b>25+</b>
			<b>(5,093)</b>	<b>(5,957)</b>	<b>(15,991)</b>	<b>(17,665)</b>
Day bus users	43	57	22	23	78	77
Night bus users	64	36	30	41	70	59

Work is the main purpose of travelling by bus among men and women, although this is higher for men than for women (58 per cent compared with 51 per cent). Of women travelling by bus during the day, 13 per cent are travelling to or from shopping (this compares with eight per cent of men) [27].



### Purpose of bus journey by gender and time of day (2014) [27]

%	During the day		At night	
	Men	Women	Men	Women
<b>Base</b>	<b>(14,982)</b>	<b>(19,815)</b>	<b>(5,525)</b>	<b>(3,036)</b>
To/from or for work	58	51	56	46
To/from shopping	8	13	1	2
Visiting friends/relatives	9	9	13	14
To/from school/education	8	9	4	4
Leisure	10	9	18	26
Personal business	5	5	2	2
Other purpose	3	3	5	6

## 5.10 Car

Women are more likely to have travelled as a car passenger than a driver in the last week. Fifty-one per cent of women travel as a passenger compared with 33 per cent travelling as a driver. These proportions are reversed for men, where 42 per cent travel as the driver and 37 per cent as a passenger [11].

Fifty-eight per cent of women aged 17 or over hold a full driving licence, a lower proportion than among men (72 per cent of men hold a driving licence). The proportion of Londoners who hold a driving licence is highest among people in younger age groups and decreases as age increases [11].

### Proportion of Londoners aged 16 or over with a full car driving licence (2016/17) [11]

%	Men	Women
<b>Base</b>	<b>(7,073)</b>	<b>(7,826)</b>
Holds a full car driving licence	72	58

Data above excludes under-16s.

Women are less likely than men to have household access to a car. Thirty-seven per cent of women do not have access to a car compared with 34 per cent of men [11].

## Proportion of Londoners in a household with access to a car (2016/17) [11]

%	Men	Women
<b>Base</b>	<b>(8,450)</b>	<b>(9,110)</b>
0 cars	34	37
1 car	44	43
2+ cars	22	20

LTDS data in this report excludes children aged under five.

## 5.11 Tube

Thirty-eight per cent of women use the Underground at least once a week; a significantly smaller figure than men at 43 per cent. Men are also more likely than women to use the Tube every day [11].

## Frequency of travelling by Tube (2016/17) [11]

%	Men	Women
<b>Base</b>	<b>(8,450)</b>	<b>(9,110)</b>
5 or more days a week	19	14
3 or 4 days a week	7	7
2 days a week	8	8
1 day a week	9	9
At least once a fortnight	8	8
At least once a month	15	16
At least once a year	22	23
Not used in the past year	7	9
Never used	5	6

LTDS data in this report excludes children aged under five.

## 5.12 Cycling

Women are less likely to cycle than men: 22 per cent of men cycle in London compared with 13 per cent of women [16].

Ten per cent of women cycle regularly (at least once a week) and a further three per cent cycle occasionally, with the remaining 87 per cent never using bikes as a way of getting around the Capital. [16].

### Proportion of Londoners who cycle (autumn 2017) [16]

%	Men	Women
<b>Base</b>	<b>(1,207)</b>	<b>(1,160)</b>
Cyclist (used a bike to get around London in the past 12 months)	22	13
Non-cyclist (not used a bike to get around London in the past 12 months)	78	87

Men travel by bicycle more frequently than women (17 per cent of men compared with 10 per cent of women use a bicycle at least once a week) [16].

### Frequency of travelling by bicycle (autumn 2017) [16]

%	Men	Women
<b>Base</b>	<b>(1,207)</b>	<b>(1,160)</b>
5 or more days a week	4	3
3 or 4 days a week	6	3
2 days a week	4	2
1 day a week	3	2
At least once a fortnight	2	1
At least once a month	-	-
At least once a year	2	1
Not used in the past year	-	-
Never used	78	87

Women are also less likely than men to be able to ride a bike. Seventy-five per cent of women living in London can ride a bike, compared with 88 per cent of men [16].

### Proportion of Londoners able to ride a bike (autumn 2017) [16]

%	Men	Women
<b>Base</b>	<b>(1,207)</b>	<b>(1,160)</b>
Can ride a bike	88	75
Cannot ride a bike	12	25

We have developed a behavioural change model to look at Londoners' readiness to cycle or cycle more. Women show a higher level of pre-contemplation about cycling than men (74 per cent and 58 per cent respectively), broadly in line with the figures from November 2014 (74 per cent and 64 per cent) [16].

Twelve per cent of men compared with seven per cent of women are classified as being in the 'sustained change' category, meaning that they started cycling or cycling more a while ago and are still doing it occasionally or regularly [16].

### Behaviour change model of cycling (autumn 2017) [16]

%	Men	Women
<b>Base</b>	<b>(1,207)</b>	<b>(1,160)</b>
<b>Pre-contemplation:</b> 'I have never thought about it but would be unlikely to start in the future' 'I have thought about it but don't intend starting in the future' 'I have never thought of starting but could be open to it in the future'	58	74
<b>Contemplation:</b> 'I am thinking about starting in the future'	13	8
<b>Preparation:</b> 'I have decided to start soon'	7	4
<b>Change:</b> 'I have tried to start recently but am finding it difficult' 'I have started recently and am finding it quite easy so far'	2	2
<b>Sustained change:</b> 'I started a while ago and am still doing it occasionally' 'I started a while ago and am still doing it regularly'	12	7
<b>Lapsed:</b> 'I had started doing this but couldn't stick to it'	9	6

## 5.13 Cycling schemes

A larger proportion of men than women have used Cycle Hire (23 per cent of women have used the scheme compared with 31 per cent of men) [16].

Twenty-nine per cent of casual Cycle Hire users (defined as not having a Cycle Hire key) are women and 22 per cent of members are women [53].

Among non-members of Cycle Hire, women are less likely than men to say they intend to use the scheme in the next year (25 per cent of women compared with 31 per cent of men) [16].

### Expected use of Cycle Hire in the future (autumn 2017) [16]

%	Men	Women
<b>Base (non-members)</b>	<b>(584)</b>	<b>(581)</b>
Yes, definitely/probably	31	25
Yes, definitely	18	11
Yes, probably	13	14
No, probably not	16	15
No, definitely not	37	38
Not sure	16	22

For both women and men, levels of awareness of Cycleways are lower than for Cycle Hire. As with Cycle Hire, men are more likely than women to be aware; 58 per cent of women are aware of Cycleways compared with 72 per cent of men. We also observed a similar pattern with usage: 23 per cent of men have used a Cycleway compared with 12 per cent of women [16].

Anticipated use of Cycleways among Londoners is similar to Cycle Hire: 22 per cent of women and 34 per cent of men say that they are definitely/probably likely to use the Cycleways in the next 12 months [16].

### Expected use of Cycleways (autumn 2017) [16]

%	Men	Women
<b>Base</b>	<b>(641)</b>	<b>(625)</b>
Yes, definitely/probably	34	22
Yes, definitely	16	9
Yes, probably	18	13
No, probably not	16	15
No, definitely not	32	39
Not sure	18	24

## Case Study: Encouraging more women in London to cycle



Our new research shows that breaking down the barriers to cycling could boost the number of women using a bicycle to get to work. The number could rise by 30,000 every day, increasing cycling in London by around 10 per cent, the equivalent of more than 50,000 extra journeys per day.

The research highlights several reasons why women choose not to cycle, including the fear of collisions, too much traffic and lack of confidence. We are tackling these barriers with our borough partners with initiatives that support community groups, such as cycle training, guided cycle rides and grants.

Cycling in the Capital has grown at a faster rate than any other form of travel over the past 10 years and there are now more than 730,000 journeys by bike every day, however, only 10 per cent of women cycle regularly.

New infrastructure across the city is helping to increase cycling and is encouraging more people to ride. The number of women has risen by four per cent in the past three years, and since Quietway 1 was launched in 2016, the number of women using the route has increased from 29 to 35 per cent.

Continuing improvements to cycling infrastructure in London, such as new cycle routes, are expected to further increase the number of cyclists, but breaking down the barriers that prevent women cycling will boost this number even more.

We are encouraging Londoners of all ages and backgrounds to take up cycling, to help improve their wellbeing and the city's air quality, and reduce traffic congestion.

## 5.14 Dial-a-Ride

Dial-a-Ride members are more likely to be women than men. Seventy-two per cent of Dial-a-Ride members are women and this proportion increases with age [29]. The 2011 Census also shows that disabled Londoners are more likely to be women than men and that the proportion of women tends to be greater with age. However, this does not happen to the same extent as the profile of Dial-a-Ride members [2].

### Dial-a-Ride membership by gender (2014) [2], 30]

%	All disabled Londoners	Dial-a-Ride members
<b>Base (excludes unknown data)</b>	-	<b>(43,683)</b>
Men	45	28
Women	55	72

### Gender splits of Dial-a-Ride membership by age (2014) [2], 30]<sup>3</sup>

Age	All disabled London residents (2011 Census %)		All Dial-a-Ride members (%)	
	Men	Women	Men	Women
<b>Base</b>	-	-	<b>(12,294)</b>	<b>(31,389)</b>
Under 20	60	40	62	38
20-34	48	52	47	53
35-49	48	52	39	61
50-64	47	53	36	64
65-79	45	55	29	71
80-89	34	66	25	75
90+	23	77	24	76

## 5.15 Journey purpose

Weekday journey purpose varies between women and men in London. Women are less likely to be travelling for work than men (19 per cent compared with 26 per cent). This may be linked to the higher proportion of women who are economically inactive.

A greater proportion of journeys by women are for the purposes of shopping/personal business. This accounts for 25 per cent of weekday journeys (compared with 18 per cent of those made by men). Women are also more likely to be making trips for education, which includes taking children to school (23 per cent compared with 16 per cent of men) [11].

<sup>3</sup> Where data does not add up to 100 per cent, this is owing to respondents not disclosing their gender.

## Weekday journey purpose (2016/17) [11]

%	Men	Women
<b>Base – all trips by Londoners</b>		
Shopping/personal business	18	25
Leisure	21	20
Education	16	23
Usual workplace	26	19
Other work-related	12	6
Other	7	8

LTDS data in this report excludes children aged under five.

### 5.16 Ticket types

There is little difference between how women and men pay for public transport and many people have used multiple payment methods. However, women are slightly more likely than men to have used Oyster pay as you go (55 per cent compared with 50 per cent) and a contactless payment card (49 per cent compared with 44 per cent). Men are slightly more likely to have made a contactless payment through their mobile device (15 per cent compared with 10 per cent of women) [30].

### Methods used to pay for public transport (2018) [30]

%	Men	Women
<b>Base: All Londoners:</b>	<b>(353)</b>	<b>(393)</b>
Oyster pay as you go	50	55
Contactless payment (card)	44	49
Oyster Travelcard	35	34
Paper ticket for single/return journey	19	17
Contactless payment (mobile device)	15	10
Paper Travelcard (daily, weekly, monthly)	14	11
Net: Oyster	71	73
Net: Contactless	47	50

As respondents could select more than one ticket type, totals may equal more than 100 per cent.

These ticket options were available at the time of the survey but may have changed since. The latest ticketing information is available here:

<https://tfl.gov.uk/fares/>



## Travelcards

Sixty-one per cent of women have an Oyster card, which is in line with the proportion of men (59 per cent) [11].

### Ticket types held (2016/17) [11]

%	Men	Women
<b>Base</b>	<b>(8,450)</b>	<b>(9,110)</b>
Oyster card	59	61
Older person's Freedom Pass	14	17
Disabled person's Freedom Pass	2	1
Staff/police pass	2	1

LTDS data in this report excludes children aged under five.

A greater proportion of women than men hold an older person's Freedom Pass (17 per cent of women compared with 14 per cent of men). A similar proportion of women and men hold a disabled person's Freedom Pass (one per cent of women compared with two per cent of men) [11].

## 5.17 Barriers

We have carried out several research programmes to investigate the barriers that Londoners face when using public transport and their findings are in general agreement. However, the issue is complex and the specific questions that Londoners were asked may have had an influence upon their responses. The impact of specific barriers may also be much more significant for some Londoners than others.

While the main barriers to increased use of public transport are similar among men and women, women are considerably more likely than men to cite many of these deterrents. The barriers to greater public transport use that are most commonly mentioned by women are:

- Overcrowding/cramped conditions (52 per cent women compared with 44 per cent men)
- The cost of travel (46 per cent women compared with 36 per cent men)
- Service disruptions (33 per cent women compared with 29 per cent men)

## Barriers to using public transport more often (2017/18) [13]

%	Men	Women
<b>Base</b>	<b>(2,724)</b>	<b>(3,421)</b>
Overcrowding/cramped conditions	44	52
Cost of travel	36	46
Disruptions to the service	29	33
Slow journey times	28	28
Passengers pushing and shoving each other	22	30
Unreliable services	23	26
Strikes	23	24
Schoolchildren/youths behaving badly	18	23
Drunken passengers/being aggressive/intimidation	18	23
Dirty environment on the bus/train	18	21
Frequency of the services	18	19
Concern about terrorist attacks	13	22
Concern about being a victim of crime on the bus/Tube/train (robbery, assault or pickpocketing)	12	16
Concern about being a victim of crime getting to and waiting for the bus/ Tube/ train (robbery, assault or pickpocketing)	12	16
Dirty environment getting to the bus/train	13	15

As respondents could select more than one answer, totals may equal more than 100 per cent.

Women are more likely than men to be travelling with buggies and/or shopping, and to be travelling with children. For this reason, the car is often seen as a convenient type of transport, presenting less of a challenge to travelling. However, our qualitative research indicates that the cost and stress associated with driving encourages some people to use public transport – particularly the bus, which is perceived to be more child-friendly and educational than other types of transport such as the Tube [34].

### Tube

Presently people make only a small number of trips on the Tube with buggies. We assume that people are put off because of accessibility issues [38]. In research that we carried out in 2012 with people travelling with restricted mobility (PRM), we found that not all disabled customers or customers travelling with children<sup>4</sup> or luggage made use of lifts available in Underground stations. Forty-eight per cent of women travelling with children planned their journey with access to a lift in mind, significantly higher than the PRM sample overall (29 per cent). When we asked people to rank the Tube for accessibility on a scale of 0–10, 28 per cent of women

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<sup>4</sup>Travelling with children is defined as those travelling with children aged under five or with a pram/buggy [36].

travelling as a PRM ranked it good to excellent (8-10), consistent with the overall result (29 per cent) [39].

## Bus

Travelling by bus with a buggy and/or children can cause potential issues with other passengers and drivers. Some buggy users make use of the wheelchair priority area on buses. We have conducted research around this area in recent years as part of a communications programme relating to the use of this space [BP, 43].

Many customers have experienced difficulties when travelling with buggies on the bus. These difficulties include crowding on the vehicles, negative attitudes of other passengers, negotiating getting on and off the bus and drivers refusing to allow buggies onboard [40]. Additionally, women travelling with buggies mention practical issues that can be problematic, such as moving the buggy around the pole to reach the wheelchair priority area, and drivers parking too far away from the kerb [41].

## 5.18 Safety and security

Women are significantly less likely than men to say that they are ‘not at all worried’ about personal security (ie being safe from crime or antisocial behaviour) while using public transport in London (14 per cent compared with 28 per cent). Women are also more likely than men to report that they are worried (either ‘quite worried’ or ‘very worried’): 34 per cent of women say they are generally worried compared with 27 per cent of men [13].

### Levels of concern about personal security when using public transport in London (2017/18) [13]

%	Men	Women
<b>Base</b>	<b>(2,724)</b>	<b>(3,421)</b>
Not at all worried	28	14
A little bit worried	41	47
Quite a bit worried	21	27
Very worried	6	7
NET: Worried	27	34
Don't know	5	6

Women are also significantly more likely than men to have felt worried about their personal security in the past three months while using public transport. Thirty-seven per cent of women have experienced a specific worrying incident in the past three months, compared with 28 per cent of men [13].

While the pattern of incidents that made them feel worried in the past three months is broadly similar among women and men, there are some incidents that women are more likely than men to have found worrying:

- Overcrowding/cramped conditions (37 per cent of women compared with 27 per cent of men)
- The threat of terrorism (34 per cent of women compared with 23 per cent of men)
- Drunken passengers being aggressive/ intimidating (30 per cent of women compared with 26 per cent of men)
- Busy environment/ large crowds of people (27 per cent of women compared with 20 per cent of men)
- Passengers pushing and shoving each other (26 per cent of women compared with 21 per cent of men) [13]

Among those who experienced a worrying event, a significantly greater proportion of men took immediate action as a result compared to the proportion of women. Forty-eight per cent of men took immediate action after the worrying incident (such as changing to another form of transport or stopping the journey altogether), as did 44 per cent of women. Men were significantly more likely to change to another form of transport as a result of feeling worried (32 per cent compared with 26 per cent of women) [13].

The longer-term impact of worrying incidents is similar among women and men. Fifteen per cent of women said they stopped travelling on the mode on which they experienced the worrying incident either temporarily (12 per cent) or completely (three per cent). This is similar to the proportion for white Londoners (17 per cent) who were put off travelling by that particular mode either temporarily (12 per cent) or completely (five per cent) [13].

## **5.19 Unwanted sexual behaviour**

Women are significantly more likely than men to have experienced unwanted sexual behaviour while using public transport in the Capital in the past 12 months. Fourteen per cent of women said they had personally experienced unwanted sexual behaviour compared with six per cent of men. However, the mean number of incidents experienced in the past three months is the same among women and men (both 2.7 incidents on average) [13].

### Experience of unwanted sexual behaviour when using public transport in past 12 months (2017/18) [13]

%	Men	Women
<b>Base</b>	<b>(2,724)</b>	<b>(3,421)</b>
Yes	6	14
No	91	83
Would rather not say	3	3

The main types of unwanted sexual behaviour experienced by women and men are broadly similar. However, women are significantly more likely than men to say they experienced staring (52 per cent compared with 28 per cent), sexual comments (43 per cent compared with 18 per cent) or wolf-whistling (28 per cent compared with 19 per cent). Conversely, men are significantly more likely than women to say they experienced a form of serious unwanted sexual behaviour, such as rape/attempted rape, groping/touching, exposure and/or masturbation (49 per cent compared with 32 per cent of women) [13].

The nature of the incidents experienced may help to explain why men were more likely than women to report the incident (48 per cent of men compared with 18 per cent of women). Additionally, a significantly greater proportion of women said they did not report the incident because they did not consider it to be serious enough to do so (41 per cent women compared with 29 per cent men) [13].

## 5.20 Hate crime

Similar proportions of women and men have experienced hate crime targeted at themselves or witnessed it targeted at others in the past year (23 per cent of women compared with 21 per cent of men) [13].

### Experience of hate crime when using public transport in past 12 months (2017/18) [13]

%	Men	Women
<b>Base</b>	<b>(2,724)</b>	<b>(3,421)</b>
NET: Yes	21	23
Yes, targeted at me	8	6
Yes, targeted at someone else/ others	15	18
No	75	73
Would rather not say	4	4

While the types of behaviours experienced or witnessed are generally consistent among women and men, women are significantly more likely to have experienced or witnessed verbal insults (76 per cent of women compared with 64 per cent of men). Conversely, men are more likely than women to have

experienced or witnessed spitting (19 per cent compared with 13 per cent) or criminal damage/graffiti (13 per cent compared with five per cent) [13].

Women and men share similar views on the perceived motivation for incidents of hate crime experienced or witnessed on public transport in the past 12 months, with the main motivations thought to be race/ethnicity or religion/belief. That said, a significantly greater proportion of men said the hate crime they experienced or witnessed was motivated by sexual orientation (16 per cent compared with nine per cent women) or disability (12 per cent compared with seven per cent) [13].

As with incidents of unwanted sexual behaviour, most instances of hate crime go unreported. Again, men are more likely than women to report such incidents (22 per cent of men compared with 17 per cent of women). The reasons for not reporting hate crime incidents are largely similar among women and men, but women are significantly more likely to have not reported the incident for the following reasons:

- Didn't know who to report it to (19 per cent women compared with 12 per cent men)
- It happened too quickly to do anything (19 per cent women compared with 12 per cent men)
- Too scared (14 per cent women compared with nine per cent men) [13]

In April 2015, we partnered with police agencies to launch a campaign called 'Report it to stop it' to encourage people to report experiences of unwanted sexual behaviour on public transport.

Among women who have ever experienced unwanted sexual behaviour, there is an upward trend of (claimed) reporting of incidents, which suggests the campaign is encouraging women who may have already been inclined to report to do so.

The campaign appears to have been effective in gradually increasing awareness among women that less intrusive offences are reportable (ie comments, vulgarity and staring), particularly among those who recognise the campaign. Furthermore, the campaign has:

- Boosted confidence that the police would be supportive through the process of reporting incidents of unwanted sexual behaviour
- Demonstrated that we are trying to make the network a safer and better place for all customers

The police are seen to be the driving force behind the campaign with us as a relevant 'partner'. Both organisations are appreciated for raising awareness of and supporting women to report unwanted sexual behaviour [42]

Since we began to monitor the use of unbooked minicabs among users of late night venues in London, there has been a significant decline in their use. Among women aged 16-34, none used an unbooked minicab to reach their onward destination on the night of the research in 2016, compared with 19 per cent in 2003 [35].

Women and men have different views on using unbooked minicabs. While 23 per cent of men say they are likely to use an illegal minicab in future, the figure is much lower at 15 per cent among women (also 15 per cent for women aged 16-34) [35].

Other initiatives by the TfL-funded Metropolitan Police Service's Safer Transport Command and City of London Police are helping to remove taxi touts from the streets. More than 400 police officers are regularly mobilised for major operations such as Safer Travel at Night. We also directly fund 68 dedicated police cab enforcement officers, 82 TfL compliance officers and 32 vehicle inspection staff, as part of the work to stamp out illegal minicab activity across the Capital [43].

**The use of illegal (unbooked) minicabs (2016) [35]**

<b>% Use of illegal minicabs</b>	<b>Men</b>	<b>Women (all ages)</b>	<b>Women (16-34)</b>
<b>Base</b>	<b>(305)</b>	<b>(216)</b>	<b>(188)</b>
Used an illegal minicab to reach onward destination on night of interview	1	0	0
Likely to use illegal minicab in future	23	15	15
Unlikely to use illegal minicab in future	75	84	84

## **Case Study: Report it to Stop it**

We launched the 'Report it to Stop it' campaign in 2015, alongside the British Transport Police, Metropolitan Police Service and City of London Police, to encourage people to report anything that makes them feel uncomfortable. Since then the number of annual reports has increased by 65 per cent, with around 2,000 reports in 2017/18.

Siwan Hayward, Director of Compliance, Policing and On-Street Services, said: ' We are determined to tackle sexual offences on the transport network. By reporting anything that makes you feel uncomfortable, supplying witness statements and working with police, you can help us to bring offenders to justice. Every report is taken seriously and you will be supported through the reporting process by an assigned officer.'

Unwanted sexual behaviour is anything that makes you feel uncomfortable, including rubbing, groping, masturbation, leering, sexual comments, indecent acts, or someone taking photos of a sexual nature without your consent. Those who experience this on public transport do not always feel they will be believed or that the offender will be caught. However, each report is taken extremely seriously, and one single report can be enough to catch an offender.

There are more than 77,000 CCTV cameras across London's transport network, as well as more than 3,000 officers dedicated to policing London's public transport network. Frontline police officers and TfL on-street enforcement officers have received training and briefing on tackling unwanted sexual behaviour on public transport.

To report this behaviour on public transport, text 61016 or call police on 101 and give details of what, where and when. There are around 3,000 police and police community support officers dedicated to policing the transport network and keeping customers safe. Frontline staff have received additional training about how to respond and police processes have been improved to provide enhanced victim support and targeted action offenders.

### **Kathryn's story**

Kathryn, who experienced unwanted sexual behaviour on the Tube last year, said: 'I was travelling on the Tube, where I was touched inappropriately several times. Despite the Tube being filled with people I felt so alone and vulnerable. As soon as I left the station I reported it and I am so glad that I did. People shouldn't be allowed to get away with making you feel frightened and they certainly shouldn't think it is okay to touch you inappropriately.

'I consequently found out that he had done the same thing to three other women and I just felt sad that he would have made other women feel the way I did on that morning. By reporting him, he has served six months in jail, he is now banned from using public transport and his name is on police file, so I feel as though I have done what I can to help protect other women from him.'



## 5.21 Customer satisfaction

### 5.21.1 Overall satisfaction

We measure overall satisfaction with various transport types in London using an 11-point scale, with 10 representing extremely satisfied and zero representing extremely dissatisfied. We then scale this up to 100.

Our standardised satisfaction ratings are shown in the table below. This allows us to apply consistent analysis across a wide range of satisfaction research.

Average rating	Level of satisfaction
Under 50	Very low/weak/poor
50-54	Low/weak/poor
55-64	Fairly/relatively/quite low/weak/poor
65-69	Fair/reasonable
70-79	Fairly/relatively/quite good
80-84	Good or fairly high
85-90	Very good or high
90+	Excellent or very high

Satisfaction levels are very similar between women and men. Only a few areas have differences of more than two points out of 100:

- Women are slightly more satisfied than men with Dial-a-Ride (85 out of 100 compared with 80 out of 100)
- Women are slightly more satisfied than men with TfL Rail (85 out of 100 compared with 82 out of 100)
- Women are slightly more satisfied than men with taxis (87 out of 100 compared with 81 out of 100)
- Men are slightly more satisfied than women with private hire vehicles (81 out of 100 compared with 84 out of 100)

## Overall satisfaction with transport types (2016/17) – all customers [15]

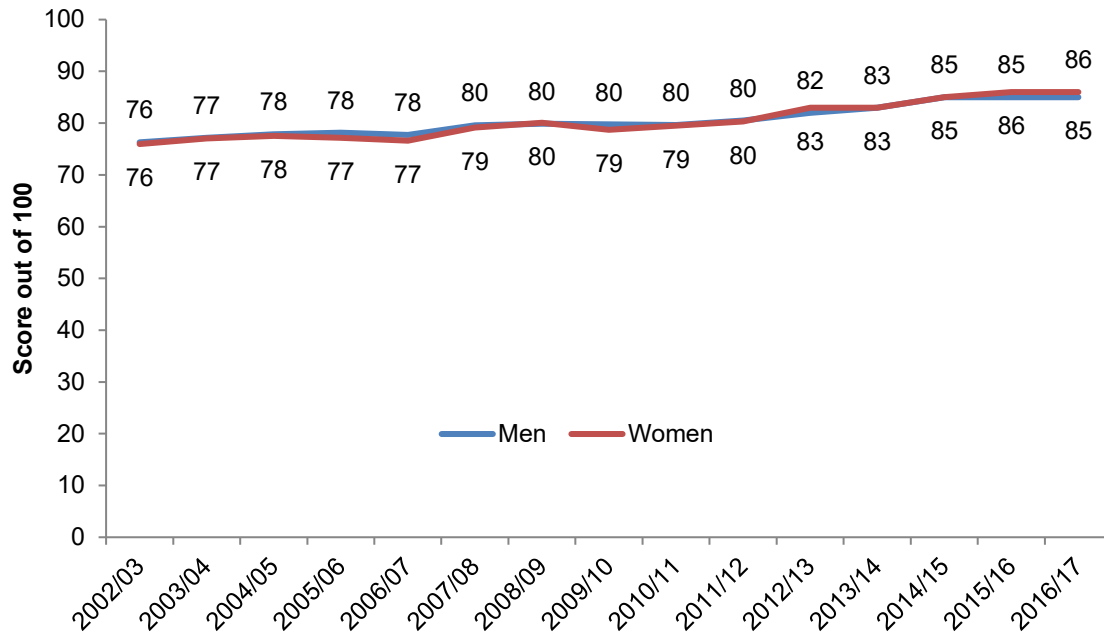
Satisfaction score (0-100)	All	Men	Women
<b>Bus services</b>			
Base	(13,032)	(5,463)	(7,569)
Satisfaction score	86	85	86
<b>Night buses</b>			
Base	(769)	(525)	(244)
Satisfaction score	85	85	85
<b>TfL Rail</b>			
Base	(4,955)	(2,670)	(2,325)
Satisfaction score	83	82	85
<b>Underground</b>			
Base	(16,947)	(7,470)	(9,477)
Satisfaction score	85	85	86
<b>Overground</b>			
Base	(13,209)	(6,668)	(6,541)
Satisfaction score	84	84	85
<b>DLR</b>			
Base	(12,243)	(6,684)	(5,559)
Satisfaction score	89	88	89
<b>Dial-a-Ride</b>			
Base	(1,457)	(221)	(1,235)
Satisfaction score	84	80	85
<b>London River Services</b>			
Base	(1,040)	(577)	(463)
Satisfaction score	90	90	90
<b>Private hire vehicles</b>			
Base	(448)	(210)	(238)
Satisfaction score	83	84	81
<b>Taxis</b>			
Base	(513)	(276)	(237)
Satisfaction score	84	81	87
<b>Trams</b>			
Base	(3,841)	(1,810)	(2,031)
Satisfaction score	90	90	91
<b>Victoria Coach Station</b>			
Base	(1,312)	(614)	(698)
Satisfaction score	81	81	82
<b>TLRN</b>			
Base	(9,592)	(4,933)	(4,659)
Satisfaction score	69	69	69

### 5.21.2 Bus

Overall satisfaction among bus users is high at 86 out of 100. Women give an overall satisfaction rating of 86 out of 100, very similar to overall satisfaction among men (85 out of 100) [15].

The trend for bus users in London over the past three years shows generally consistent ratings of overall satisfaction for both women and men [15].

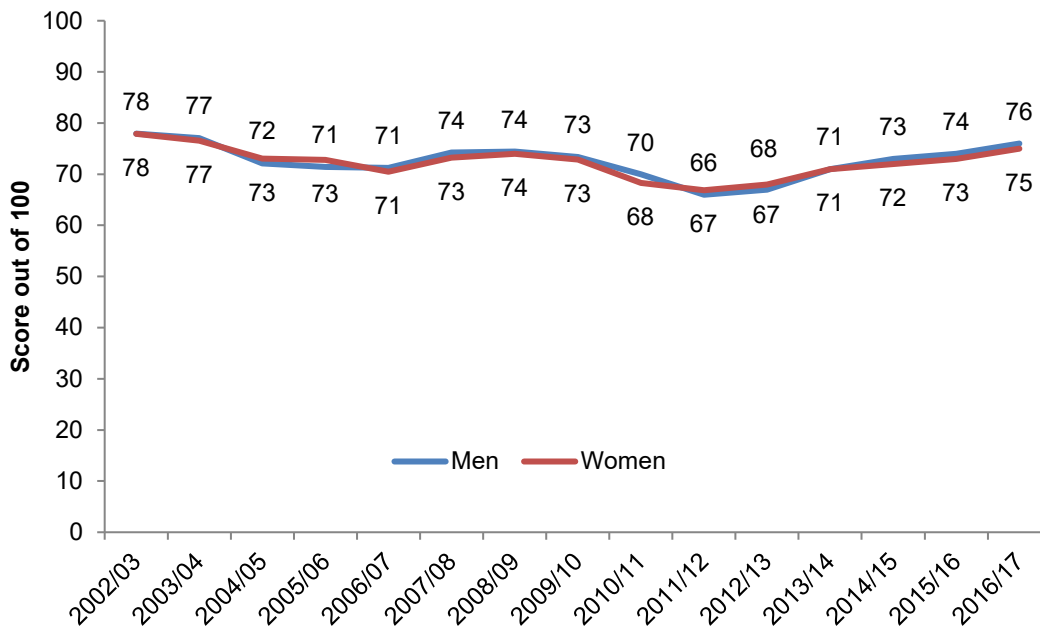
#### Overall satisfaction with buses over time [15]



As we have found across all types of transport, satisfaction with value for money of the bus is lower than overall satisfaction. The rating for value for money is 75 out of 100 for women and 76 out of 100 for men [15].

Satisfaction with value for money of buses shows a consistent improvement among both men and women over the past five years. There is no discernible difference with the satisfaction of value for money between women and men [15].

### Satisfaction with value for money with buses over time [15]



### Drivers of satisfaction

Journey time and ease of making a journey are key drivers of satisfaction with buses for both women and men. Ease of making the journey is the main driver for women, whereas journey time is the main driver for men [15].

### Drivers of satisfaction for bus users [15]

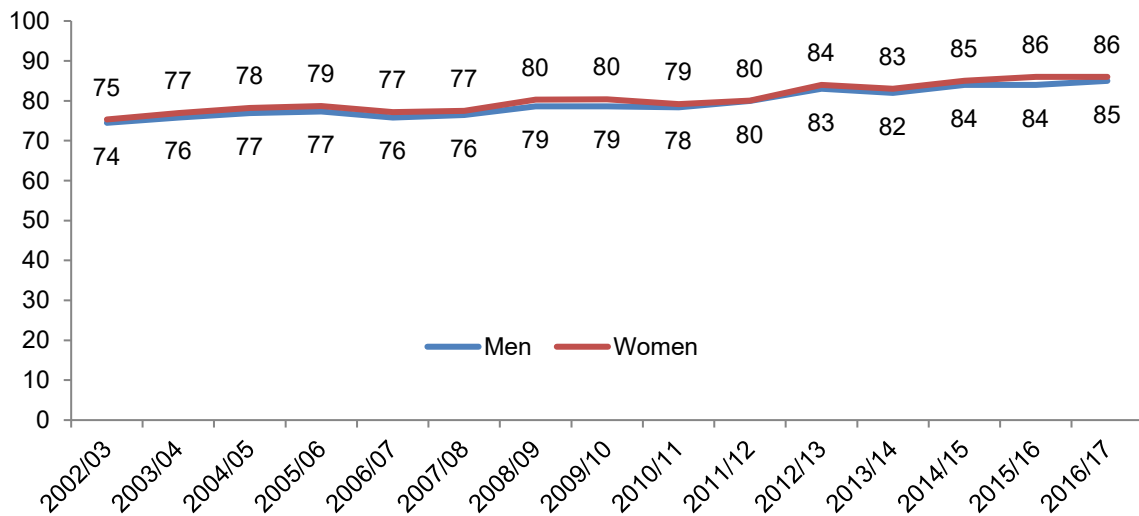
Men	Women
Journey time	Ease of making journey
Ease of making journey	Journey time
Safety and security at stops and shelters	Comfort inside the bus
Time waited to catch bus	Time waited to catch bus
Comfort inside the bus	Smoothness and freedom from jolting

### 5.21.3 Tube

Overall satisfaction with the Tube among women in London is high at 86 out of 100. This is in line with men's satisfaction level (85 out of 100) [15].

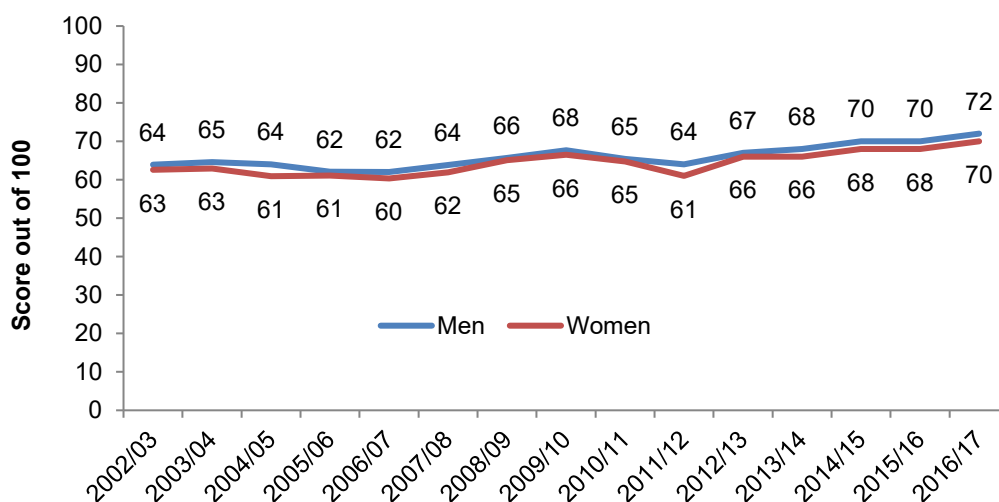
Long-term trends show that levels of overall satisfaction have risen eleven points over the past fourteen years. They have been fairly stable over the past three years [15].

#### Overall satisfaction with the Tube over time [15]



Satisfaction with value for money of the Tube is lower than overall satisfaction ratings. Women rate their satisfaction with value for money slightly lower than men do, giving a rating of 70 out of 100 compared with 72 out of 100 by men [15].

## Satisfaction with value for money with the Tube over time [15]



Satisfaction ratings are very similar between women and men for all measures covered in the research (for example, level of crowding, personal safety) [15].

### Drivers of satisfaction

Among women and men who use the Tube, overall satisfaction is related to the same main drivers: ease of making the journey, comfort of journey and length of journey time. Men are slightly more likely to prioritise train crowding (the fourth most important driver of overall satisfaction) and length of time waited for trains, whereas women are more likely to prioritise personal safety [15].

### Drivers of satisfaction for Tube users [15]

Men	Women
Ease of making journey	Ease of making journey
Comfort of journey	Comfort of journey
Length of journey time	Length of journey time
Length of time waiting for train	Train crowding
Train crowding	Personal safety on train

### 5.21.4 Overground

Women on the whole are satisfied with the London Overground service at 85 out of 100. Men also give a similar overall rating (84 out of 100) [15].

Women and men give very similar satisfaction ratings for each of the service elements that we monitor. Women and men are fairly satisfied with their personal safety when

using the Overground, women rating their satisfaction as 88 out of 100, which is similar to men's rating of 89 out of 100 [15].

### Overall satisfaction with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	Men	Women
<b>Base 2016/17</b>	<b>(13,209)</b>	<b>(6,668)</b>	<b>(6,541)</b>
2009/10	73	73	73
2010/11	80	80	82
2011/12	82	81	82
2012/13	82	82	82
2013/14	82	82	83
2014/15	83	82	83
2015/16	84	84	84
2016/17	84	84	85

Satisfaction with value for money of London Overground is high at 73 out of 100 among women (men give a rating of 74 out of 100) [15].

### Satisfaction with value for money with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	Men	Women
<b>Base 2016/17</b>	<b>(12,491)</b>	<b>(6,344)</b>	<b>(6,147)</b>
2011/12	72	72	71
2012/13	71	71	70
2013/14	70	70	71
2014/15	73	72	73
2015/16	73	73	72
2016/17	73	74	73

### Drivers of satisfaction

Ease of making a journey is the biggest driver of overall satisfaction for both women and men when using London Overground. Trains running on time is the second biggest driver for women, whereas for men it is about feeling valued as a customer [15]. The main drivers of overall satisfaction are:

## Drivers of satisfaction for Overground users [15]

Men	Women
Ease of making journey	Ease of making journey
Feel valued as a customer	The train running on time
Information about service disruptions on the train	Feel valued as a customer
How well the information or assistance meet needs	Comfort of train
Information about service disruptions at the station	Information about service disruptions on the train

### 5.21.5 DLR

Overall satisfaction with the DLR is very good among women at 89 out of 100 (compared with 88 out of 100 for men) [15].

#### Overall satisfaction with DLR over time – all customers [15]

Satisfaction score (0-100)	All	Men	Women
<b>Base 2016/17</b>	<b>(12,243)</b>	<b>(6,684)</b>	<b>(5,559)</b>
2009/10	81	81	81
2010/11	81	81	82
2011/12	82	82	83
2012/13	87	86	87
2013/14	87	86	88
2014/15	89	88	89
2015/16	89	88	89
2016/17	89	88	89

As with other types of transport, we have observed no real differences in satisfaction ratings with the service between women and men using the DLR. Women and men alike are most likely to be satisfied with the ease of getting on trains and their personal safety while travelling [15].

Satisfaction with value for money of the DLR among women is higher than other types of transport at 79 out of 100, and the same rating is given by men [15].

#### Satisfaction with value for money with DLR over time – all customers [15]

Satisfaction score (0-100)	All	Men	Women
<b>Base 2016/17</b>	<b>(11,554)</b>	<b>(6,316)</b>	<b>(5,238)</b>
2011/12	72	72	72
2013/14	75	75	75
2014/15	77	77	77
2015/16	78	78	77
2016/17	79	79	79



## Drivers of satisfaction

The top drivers of overall satisfaction with the DLR are similar for women and men, although women focus slightly more on how issues with using tickets were resolved, whereas men are more focused on the length of time the journey took [15]. The main drivers of satisfaction are:

### Drivers of satisfaction for DLR users [15]

Men	Women
Ease of making journey	Ease of making journey
Comfort inside the train	How issues using ticket were resolved
Length of time journey took	Reliability of trains
Reliability of trains	Ease of getting on the train
Ease of getting on the train	Comfort inside the train

## 5.21.6 Trams

Overall satisfaction with trams is very high among customers at 90 out of 100. This is slightly higher among women than men (91 out of 100 for women compared with 90 out of 100 for men) [15].

### Overall satisfaction with trams over time – all customers [15]

Satisfaction score (0-100)	All	Men	Women
<b>Base 2016/17</b>	<b>(3,841)</b>	<b>(1,810)</b>	<b>(2,031)</b>
2009/10	86	85	88
2010/11	85	86	85
2011/12	86	86	86
2012/13	89	88	90
2013/14	89	88	90
2014/15	89	89	90
2015/16	90	89	91
2016/17	90	90	91

Overall satisfaction with value for money on the tram network is good (82 out of 100) but it is slightly lower for women than men (81 out of 100 compared with 82 out of 100) [15].

### Satisfaction with value for money with trams over time – all customers [15]

Satisfaction score (0-100)	All	Men	Women
<b>Base 2016/17</b>	<b>(2,415)</b>	<b>(1,152)</b>	<b>(1,263)</b>
2011/12	73	73	73
2012/13	78	77	78
2013/14	78	79	78
2014/15	78	79	77
2015/16	79	80	79
2016/17	82	82	81

### 5.21.7 Streets

Women are slightly less likely than men to be satisfied with the streets and pavements after their last journey by foot (women give a satisfaction rating of 68 out of 100 compared to 70 out of 100 among men) [33].

Satisfaction ratings for the streets for their last car journey are also similar among women and men (62 out of 100 for women compared with 63 out of 100 for men) [33].

However, women were significantly less satisfied with the streets on their last cycling journey. Women give a satisfaction rating of 59 out of 100, compared with men's rating of 71 out of 100 [33].

#### Overall satisfaction with streets and pavement after last journey – walking journey [33]

Satisfaction score (0-100)	All	Men	Women
<b>Base 2018</b>	<b>(951)</b>	<b>(475)</b>	<b>(476)</b>
2017	69	70	68
2018	69	70	68

#### Overall satisfaction with streets and pavement after last journey over time – car journey [33]

Satisfaction score (0-100)	All	Men	Women
<b>Base 2018</b>	<b>(870)</b>	<b>(444)</b>	<b>(426)</b>
2017	63	63	64
2018	63	63	62

#### Overall satisfaction with streets and pavement after last journey over time – cycling journey [33]

Satisfaction score (0-100)	All	Men	Women
<b>Base 2018</b>	<b>(314)</b>	<b>(198)</b>	<b>(116)</b>
2017	64	65	63
2018	66	71	59

### 5.21.8 Transport for London Road Network (TLRN)

Satisfaction with the TLRN is reasonable to fairly good. Women give a score of 68 out of 100 for walking, 71 out of 100 for travelling by bus, 66 out of 100 for cycling on red routes and 68 out of 100 for driving. There is very little difference between the ratings given by women and men [15].

#### Overall satisfaction – general impression of red routes over time [15]

Satisfaction score (0-100)	All	Men	Women
<b>Walking</b>			
Base 2016/17	(3,432)	(1,560)	(1,872)
2013/14	70	68	71
2014/15	68	66	69
2015/16	68	68	68
2016/17	68	68	68
<b>Travelling by bus</b>			
Base 2016/17	(1,375)	(603)	(772)
2013/14	69	67	72
2014/15	71	70	71
2015/16	71	70	73
2016/17	72	72	71
<b>Driving</b>			
Base 2016/17	(2,286)	(1,172)	(1,114)
2013/14	67	66	71
2014/15	67	65	68
2015/16	70	69	71
2016/17	69	68	70
<b>Cycling</b>			
Base 2016/17	(1,048)	(607)	(441)
2013/14	69	68	68
2014/15	70	70	71
2015/16	65	66	63
2016/17	66	66	66

## 5.22 Access to information

From our research, women are thought to be more cautious in their travel behaviour than men. Our customer segmentation studies (Touchpoints) suggest that women are more likely to fit into the categories of ‘travel shy’, ‘reassurance seeker’ and ‘cautious planner’. For all three categories, levels of confidence using the public transport network are relatively low (particularly so for people who are classed as ‘travel shy’). As a result, some women may choose to restrict themselves to familiar journeys where possible or seek advice and information to help plan and complete journeys [44].

We provide a wide range of information sources. While there are some specific differences in the use of particular information sources by women compared to men (for example, women are more likely than men to use the pocket Tube map - 85 per cent compared with 73 per cent), on the whole, awareness and use of information sources is comparable between women and men [45].

### 5.22.1 Access to the internet

Looking solely at online Londoners, use of the internet at home and ‘on the move’ is very similar among women and men. However, women are less likely than men to access the internet at work, possibly owing to women being less likely than men to be in employment [14].

#### Accessing the internet (autumn 2017/spring 2018) [14]

%	Men	Women
<b>Base (online Londoners)</b>	<b>(934)</b>	<b>(1,128)</b>
Access at home	100	100
Access ‘on the move’	80	81
Access at work	70	62

Women use the internet for a variety of reasons. The top reasons are:

#### Main reasons for accessing the internet (autumn 2017/spring 2018) [14]

%	Men	Women
<b>Base (online Londoners)</b>	<b>(934)</b>	<b>(1,128)</b>
Email	96	97
Finding/sourcing information	90	92
Buying goods and services	89	91
Maps and directions	89	91
Accessing live public transport information (eg travel conditions, delays)	81	83

Overall internet use is very similar between women and men. However, online women are more likely than online men to use the internet for:

- Social media and networking (83 per cent women compared with 76 per cent men)
- Sharing photos (70 per cent women compared with 64 per cent men) [14]

The most popular social networking site for both online women and men is YouTube, which is used by 85 per cent of women (and 83 per cent of men).

There are some differences between the social media sites used by online women and men. Women are more likely than men to use:

- Facebook (78 per cent compared with 73 per cent)
- Pinterest (44 per cent compared with 33 per cent)

Conversely, online men are more likely than women to use:

- Twitter (53 per cent compared with 47 per cent)
- LinkedIn (49 per cent compared with 39 per cent)
- Google+ (44 per cent compared with 39 per cent)
- Tumblr (28 per cent compared with 23 per cent) [14]

### 5.22.2 Device usage and behaviour

Online women and men are equally likely to own a smartphone (85 per cent women compared with 84 per cent men). Smartphone use has significantly increased over the past few years (in 2010, 55 per cent of women owned a smartphone) [14].

#### Proportion of Londoners who own a smartphone (iPhone, BlackBerry, other) (autumn 2017/spring 2018) [14]

%	Men	Women
<b>Base</b>	<b>(934)</b>	<b>(1,128)</b>
Uses a smartphone	84	85

### 5.22.3 Using the TfL website

Eighty-nine per cent of both online women and online men living in London access the TfL website. Forty-one per cent of women and 47 per cent of men access the TfL website three to four times a week or more [14].

Overall, 11 per cent of both online women and online men in London never use the TfL website [14].

### Proportion of Londoners who use tfl.gov.uk [14]

%	Men	Women
<b>Base</b>	<b>(934)</b>	<b>(1,128)</b>
Use TfL website	89	89
Daily	30	24
3-4 times a week	17	17
3-4 times a month	18	21
Once a month	11	12
Less than once a month	12	15
Never	11	11

Online women and online men tend to use the TfL website for similar reasons, the most common being journey planning (77 per cent of women and 75 per cent of men). However, women are less likely than men to use the TfL website for gathering information about roads (10 per cent compared with 14 per cent) or about cycling (two per cent compared with six per cent) [14].

#### 5.22.4 Reasons for visiting the TfL website (autumn 2017/spring 2018) [14]

%	Men	Women
<b>Base (online Londoners)</b>	<b>(934)</b>	<b>(1,128)</b>
Journey planning	75	77
Ticketing (information and buying)	29	31
Viewing maps	28	30
Budgeting	19	18
Information about roads	14	10
Information about cycling	6	2

#### 5.22.5 Accessing information in the event of travel disruption

Women are as likely as men to seek real-time travel information about problems or delays (96 per cent compared with 95 per cent of men). Similar proportions of women and men access real-time travel information via the TfL website (45 per cent women and 41 per cent men), via apps (27 per cent women and 29 per cent men), from TfL Twitter feeds (10 per cent women compared with 13 per cent men) and from other Twitter feeds (eight per cent women and nine per cent men).

Women are significantly more likely than men to speak to staff while travelling to obtain information (44 per cent vs 38 per cent respectively) and to check announcements or displays about problems or delays on public transport (64 per cent compared with 54 per cent of men) [14].

## 6 Older people

### Key findings

- Londoners aged 65 or over make up 11 per cent of London's population [2]
- Older Londoners tend to make fewer weekday journeys (2.1 journeys on average compared with 2.4 for Londoners overall). This is especially the case among Londoners aged 70-79 (2.2 journeys) and those aged 80 and over (1.5 journeys) [11]
- Walking is the most frequently used type of transport by older Londoners aged 65 and over (87 per cent walk at least once a week). Sixty-five per cent travel by bus, 43 per cent drive a car at least once a week and 41 per cent travel by car as a passenger at least once a week [11]
- Older Londoners tend to give higher overall satisfaction scores for nearly all transport type than all Londoners [15]
- Older Londoners (14 per cent) are less likely than Londoners overall (30 per cent) to say they are worried about their personal security when using public transport. They are also less likely to have experienced a specific incident of worry when travelling in the past three months (13 per cent, compared with 32 per cent of all Londoners) [13]
- Older online Londoners are less likely to access the internet 'on the move' or at work than online Londoners overall [14]
- Older online Londoners, aged 65 or over are less likely to use the TfL website than Londoners overall (75 per cent compared with 89 per cent of all online Londoners) [14]
- Older online Londoners are also less likely to use a smartphone (50 per cent compared with 84 per cent of all online Londoners) [14]

## 6.1 Summary – Older People

### 6.1.1 Profile of older Londoners

Londoners aged 65 and over make up 11 per cent of the Capital's population [2]. Older Londoners have a different demographic profile to the total London population in a number of ways. Compared with all Londoners, people aged 65 and over are more likely to be women (55 per cent of Londoners aged 65 and over are women compared with 50 per cent of all Londoners), from a white ethnic group (76 per cent of Londoners aged 65 and over are white compared with 62 per cent of all Londoners), on an annual household income of less than £20,000 per year (54 per cent of Londoners aged 65 and over live in a lower income household compared with 28 per cent of all Londoners) and be disabled (32 per cent of Londoners aged 65 and over are disabled compared with nine per cent of all Londoners) [11]. Each of these factors can affect the travel behaviour and attitudes of older people in London.

### 6.1.2 Transport behaviour

Older people tend to travel less frequently. Walking is the most commonly used transport option by older Londoners; 87 per cent of Londoners aged 65 and over walk at least once a week (86 per cent in 2013/14). The bus is also an important form of transport for people aged 65 and over, with 65 per cent saying they use the bus at least once a week (61 per cent in 2013/14) [11].

With the exception of driving and travelling by bus, older Londoners use all forms of transport less frequently than the total London population (for example, walking 87 per cent compared with 95 per cent overall; Tube 28 per cent compared with 41 per cent overall) [11].

- Forty-three per cent of Londoners aged 65 and over drive a car at least once a week and 41 per cent travel by car as a passenger (both 45 per cent in 2013/14) [11]
- Around three-quarters of Londoners aged between 65 and 69 hold a full driving licence (72 per cent compared with 65 per cent of all Londoners). This drops considerably for the older age groups (63 per cent for 70 to 79-year-olds and 37 per cent for 80+), in line with previous years [11]
- A similar proportion have access to a car (70 per cent of Londoners aged between 65 and 69 compared with 65 per cent all Londoners). Again, this drops considerably for the older age groups (65 per cent for 70 to 79-year-olds and 43 per cent for 80+) [11]
- Londoners aged 65 and over continue to be less likely to cycle as a means of transport compared to all Londoners. Four per cent sometimes use a bicycle to get around London compared with 17 per cent of the wider London population [16]
- Dial-a-Ride members continue to have an older age profile than disabled Londoners overall; 82 per cent of Dial-a-Ride members are aged 65 or over compared with 41 per cent of all disabled Londoners [30, AB]
- Fifty-one per cent of weekday journeys made by Londoners aged 65 and over are for shopping/personal business, while 30 per cent are for leisure purposes, both



in line with proportions from 2013/14 (52 per cent and 31 per cent respectively) [11]

### **6.1.3 Barriers**

A number of the barriers to greater public transport use that affect all Londoners are less likely to impact people aged 65 and over. For example, slow journey times are seen as a barrier to increased public transport use for 28 per cent of all Londoners, compared with 20 per cent of Londoners aged 65 and over. Conversely, incidents relating to antisocial behaviour are more likely to be cited by older Londoners [13].

The most commonly mentioned barrier cited by 42 per cent of Londoners aged 65 years and over (compared with 48 per cent of all Londoners) is concern about overcrowded services [13].

Londoners aged 65 or over are significantly less likely to say they are worried (either 'quite worried' or 'very worried') than all Londoners (14 per cent of older Londoners compared with 30 per cent all Londoners). Experience of worrying incidents on public transport in the past three months is also much lower among Londoners aged 65 and over (13 per cent) than for all Londoners (32 per cent) [13].

### **6.1.4 Customer satisfaction**

Older customers tend to be more satisfied with all types of transport than customers overall [15].

- Overall satisfaction with buses is high at 90 out of 100 (compared with 86 for customers overall) [15]
- Overall satisfaction with the Tube is also high at 88 out of 100 (compared with 85 out of 100 for all customers) [15]
- Older Londoners are also more satisfied with value for money than customers overall [15]

### **6.1.5 Access to information**

Online Londoners aged 65 and over are less likely to access the internet 'on the move' or at work. Forty-one per cent access the internet 'on the move', compared with 81 per cent of all online Londoners. Internet access at work is even more disparate, with just 16 per cent; considerably lower than all online Londoners (66 per cent) [14].

The top reasons for using the internet are broadly the same for older online Londoners and all online Londoners. However, older online Londoners are considerably less likely to use the internet for accessing live public transport information (70 per cent compared with 82 per cent overall), or for making day to day travel plans (48 per cent compared with 71 per cent overall) [14].

Use of the TfL website is also lower among online Londoners aged 65 and over compared to online Londoners overall (75 per cent compared to 89 per cent respectively) [14].

The most common use of the TfL website for online Londoners aged 65 and over and all online Londoners is for journey planning (65 per cent and 76 per cent respectively). However, given that the vast majority of 65-year-olds or over have an older person's Freedom Pass, it is perhaps unsurprising that they are far less likely than all online Londoners to use the TfL website for ticketing (10 per cent, compared with 30 per cent of all online Londoners), or for budgeting purposes (one per cent compared with 19 per cent of all online Londoners) [14].

Older online Londoners are significantly less likely to use a smartphone (50 per cent compared with 84 per cent of all online Londoners) [14].

## 6.2 Introduction

People aged 65 and over make up 11 per cent of London's population and it is projected that this proportion will grow over time [2, 18].

For many people, the transition from working to retirement changes the way that they use public transport in London. Journey purposes shift away from the focus of work and journeys tend to be made less frequently.

This chapter focuses predominantly on Londoners aged 65 and over. Where possible, data is shown for the age bands of 65-69, 70-79 and 80+, though other similar age brackets are used where data is not available.

Transport behaviour, attitudes and barriers in this chapter may well be influenced by a number of factors other than age, with disability, gender, income and education all affecting perceptions towards travel in London.

## 6.3 Profile of older people in London

Eleven per cent of Londoners are aged 65 and over. Three per cent of the London population is aged 80 and over [2].

### 2011 Census – age profile of Londoners [2]

%	All	Proportion of age group who are...	
		Men	Women
15 and under	20	51	49
16-24	12	50	50
25-59	53	50	50
60-64	4	48	52
65-69	3	47	53
70-79	5	46	54
80+	3	37	63

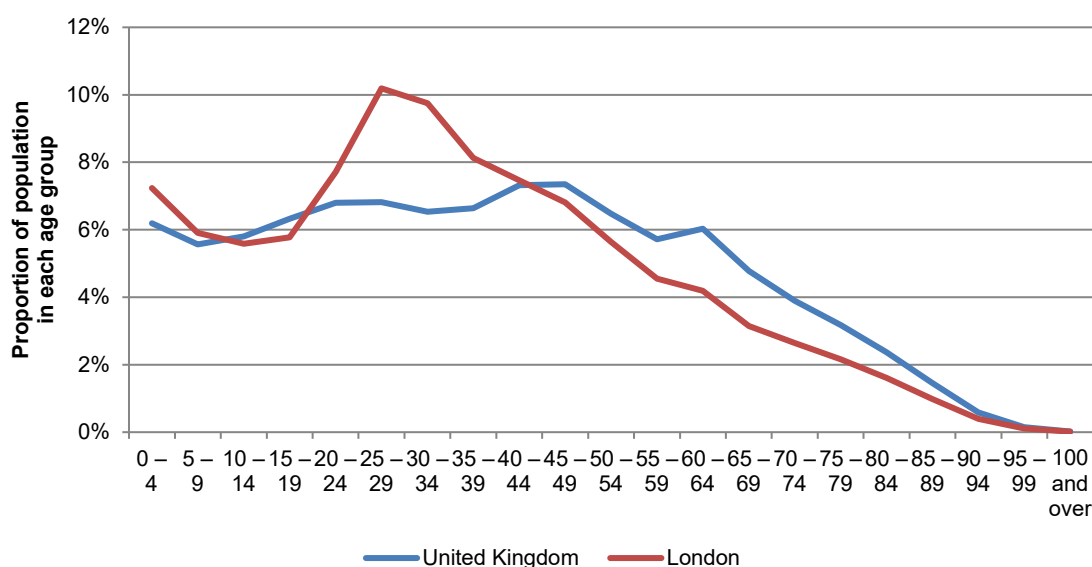
### Percentage change in population of London (1971–2011) [49, AB]

% change	1971–1981	1981–1991	1991–2001	2001–2011
All ages	-10	0	+7	+12
0-14	-22	+2	+8	+8
15-64	-8	+2	+10	+17
65+	+4	-8	-7	+1

The proportion of older Londoners is set to grow. The GLA estimate is that by 2040, 15 per cent of London’s population will be aged 65 or over [17].

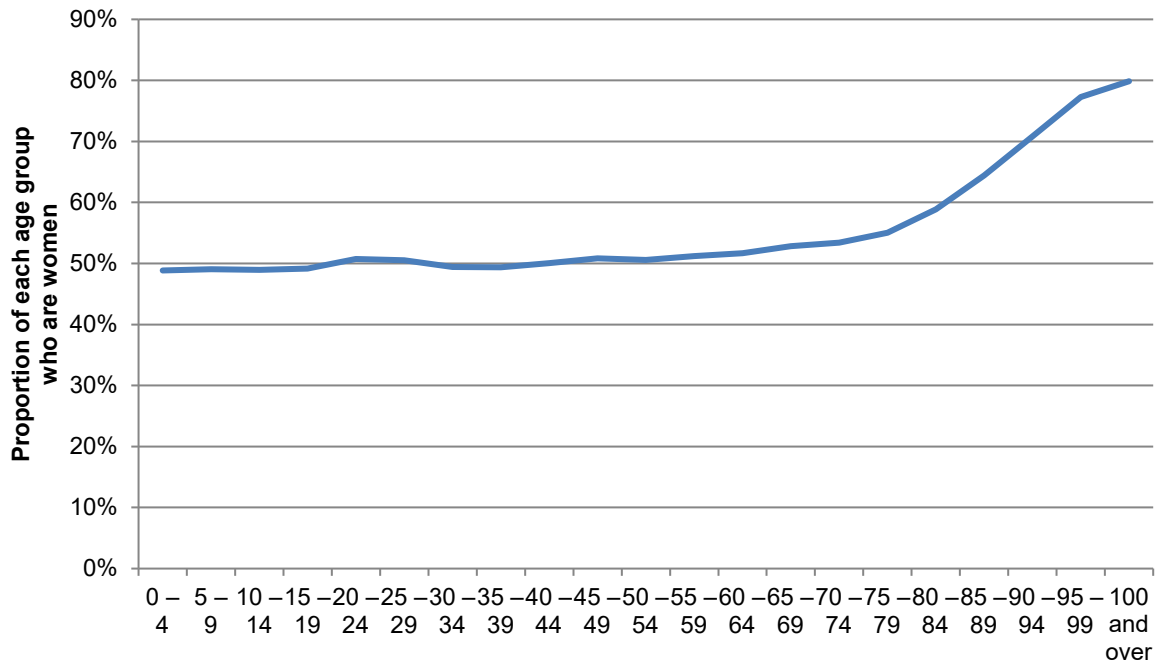
The chart below shows how, in comparison to the UK average, London has a smaller proportion of people aged 65 and over and a greater proportion of people aged between 20 and 44. Eighteen per cent of the total UK population are aged 65 or over [2].

### Population split by age (2011) [2]



Londoners aged 65 and over are more likely to be women (56 per cent) than all Londoners (51 per cent). The difference is particularly pronounced among Londoners aged 80 and over where 63 per cent are women [2].

## Proportion of Londoners who are women by age (2011) [2]



In this document we use two primary sources of demographic data: the ONS Census and the LTDS.

## LTDS demographic profile of older people in London (2016/17) [11]

%	All	65+	65-69	70-79		80+
<b>Base</b>	<b>(17,560)</b>	<b>(2,691)</b>	<b>(770)</b>	<b>(1,273)</b>		<b>(648)</b>
<b>Gender</b>						
Men	50	45	48	44		42
Women	50	55	52	56		58
<b>Ethnicity</b>						
White	62	76	76	72		81
BAME	37	23	23	25		19
<b>Household income</b>						
Less than £10,000	12	26	21	24		35
£10,000–£19,999	16	28	23	29		35
£20,000–£34,999	20	21	22	23		18
£35,000–£49,999	15	9	12	8		6
£50,000–£74,999	15	7	9	8		3
£75,000+	23	8	13	8		4
<b>Working status*</b>						
Working full-time	44	6	13	4		-
Working part-time	9	6	11	6		1
Student	7	-	-	-		-
Retired	13	84	72	87		96
Not working	12	3	4	3		2
<b>Disabled</b>						
Yes	9	32	19	28		58
No	91	68	81	72		42
<b>Impairment affects travel</b>						
Yes	8	28	15	24		54
No	92	72	85	76		46

LTDS data in this report excludes children aged under five and working status does not include under-16s.

All TfL surveys use the Equality Act 2010 to define disabled people as those who define themselves as having a long-term physical or mental disability or health issue that impacts on their daily activities, the work they can do, or limits their ability to travel.

White Londoners tend to have an older age profile than BAME Londoners. This is seen in Census data below, where 78 per cent of Londoners aged 65 and over are from a white ethnic group, compared with 60 per cent of all Londoners [2].

## Proportion of older Londoners by detailed ethnic group [2]

%	All	65+
<b>White: total</b>	<b>60</b>	<b>78</b>
English/Welsh/Scottish/Northern Irish/British	45	67
Irish	2	5
Gypsy or Irish Traveller	-	-
Other white	13	6
<b>Mixed/multiple ethnic group: total</b>	<b>5</b>	<b>1</b>
White and black Caribbean	1	-
White and black African	1	-
White and Asian	1	-
Other Mixed	1	-
<b>Asian/Asian British: total</b>	<b>18</b>	<b>11</b>
Indian	7	6
Pakistani	3	1
Bangladeshi	3	1
Chinese	2	1
Other Asian	5	2
<b>Black/African/Caribbean/black British: total</b>	<b>13</b>	<b>8</b>
African	7	2
Caribbean	4	5
Other black	2	1
<b>Other ethnic group: total</b>	<b>3</b>	<b>2</b>
Arab	1	-
Any other ethnic group	2	1

## 6.4 Employment and income

Eighty-four per cent of Londoners aged 65 and over are retired and 12 per cent are in full- or part-time work, compared with 86 per cent and 11 per cent in 2013/14. The proportion of Londoners who are retired ranges from 72 per cent among Londoners aged 65-69 to 96 per cent among Londoners aged 80 or over (76 per cent and 97 per cent respectively in 2013/14) [11].

With increasing age the proportion of Londoners who are working decreases and therefore a shift occurs towards increasing proportions in the lower bands for household income [11]. Please note that household income does not always reflect employment or household wealth.

Average household incomes are substantially lower for older Londoners than Londoners overall; 26 per cent aged 65 or over have an annual household income of less than £10,000, compared with 12 per cent of all Londoners. However, both proportions are lower compared with those observed in 2013/14 (34 per cent of those aged 65 or over and 17 per cent of all Londoners) [11].

## 6.5 Older disabled people

Of all Londoners aged 65 and over, 32 per cent report that they are disabled or have a health issue that limits their daily activities, lower than the proportion reported in 2013/14 (37 per cent). With increasing age, the proportion of people who report that they are disabled or have a health issue that limits their ability to travel and get about increases to 58 per cent among Londoners aged 80 or over. Again though, this is lower than the level observed in 2013/14 (64 per cent) [11].

You can find more information about disabled Londoners in the relevant chapter of this report.

## 6.6 London boroughs

### London boroughs with the highest proportion of older residents [2]

Borough	% proportion of older residents
Havering	18
Bromley	17
Bexley	16
Sutton	14
Harrow	14

### London boroughs with the lowest proportion of older residents [2]

Borough	% proportion of older residents
Tower Hamlets	6
Newham	7
Hackney	7
Lambeth	8
Southwark	8

## 6.7 Travel behaviour

Older Londoners aged 65 or over make an average of 2.1 trips per weekday, compared with 2.4 trips per weekday for all Londoners [11]. Compared to 2013/14, Londoners appear to be making fewer weekdays trips (those aged 65 or over made an average of 2.3 trips per weekday and the average for all Londoners was 2.7 trips) [11].

Londoners aged between 65 and 69 make an average of 2.5 trips per weekday (2.7 trip in 2013/14), just slightly less than the number of trips made by Londoners overall. This average drops to 2.2 among Londoners aged between 70 and 79 and 1.5 among people aged 80 and over (2.4 and 1.6 respectively in 2013/14) [11]. This is likely to be related to the higher proportion of older Londoners who are retired and no longer need to make regular journeys to work, as well as decreasing individual mobility.

## 6.8 Transport types used

The most frequent method of transport used by older Londoners and all Londoners is walking. Eighty-seven per cent of Londoners aged 65 or over walk at least once a week, in line with 86 per cent in 2013/14. This figure continues to be higher for older Londoners aged under 80; 94 per cent of Londoners aged 65-69 walk at least once a week (94 per cent in 2013/14). The equivalent figure is 90 per cent among Londoners aged 70-79 (90 per cent in 2013/14) and decreases even further to 73 per cent of Londoners aged 80 or older (up from 69 per cent in 2013/14) [11].

Buses are the next most common type of transport used by older Londoners; 65 per cent of Londoners aged 65 or over take the bus at least once a week, up from 61 per cent in 2013/14. Bus travel is higher among Londoners aged between 65 and 79 (68 per cent of Londoners aged 65-79 use them at least once a week, compared with 65 per cent in 2013/14) but this decreases among Londoners aged 80 or over (56 per cent, up from 50 per cent in 2013/14). For all other types of transport, except the car as a passenger and minicab, levels of use either remain the same or decline as age increases [11].

Among Londoners aged 65-69, 54 per cent drive a car at least once a week, which is higher than Londoners overall (38 per cent). Londoners aged 80 or over are considerably less likely to drive a car, and only 25 per cent drive every week (27 per cent in 2013/14) [11].

Use of the Tube among Londoners aged 65 and over is now higher compared with the level observed in 2013/14. Twenty-eight per cent of Londoners aged 65 and over take the Tube at least once a week, significantly greater than the corresponding proportion in 2013/14 (23 per cent). This is owing to higher proportions of Tube users aged 70-79 years old (23 per cent in 2013/14, compared with 28 per cent in 2016/17) and those aged 80 years plus (11 per cent in 2013/14, compared with 15 per cent in 2016/17) [11].



## Proportion of Londoners using types of transport at least once a week (2016/17) [11]

%	All	65+	65-69	70-79	80+
<b>Base</b>	<b>(17,560)</b>	<b>(2,691)</b>	<b>(770)</b>	<b>(1,273)</b>	<b>(648)</b>
Walking	95	87	94	90	73
Bus	59	65	67	68	56
Car (as a passenger)	44	41	39	41	43
Tube	41	28	36	28	15
Car (as a driver)	38	43	54	45	25
National Rail	17	12	16	12	5
Overground	12	6	9	6	3
Other taxi/minicab (private hire vehicle)	10	6	5	5	7
DLR	5	2	2	2	2
London taxi/black cab	3	2	2	2	3
Trams	2	2	3	2	1
Motorbike	1	-	1	-	-

LTDS data in this report excludes children aged under five.

## 6.9 Walking

Older Londoners are less likely to walk at least once a week than all Londoners (87 per cent of Londoners aged 65 or over walk once a week compared with 95 per cent of all Londoners). The proportion of older Londoners who walk declines with age; 94 per cent of 65 to 69-year-olds walk at least once a week compared with 90 per cent of 70 to 79-year-olds and 73 per cent of Londoners aged 80 or over [11].

## Frequency of walking (2016/17) [11]

%	All	65+	65-69	70-79	80+
<b>Base</b>	<b>(17,560)</b>	<b>(2,691)</b>	<b>(770)</b>	<b>(1,273)</b>	<b>(648)</b>
5 or more days a week	84	63	74	66	42
3 or 4 days a week	5	12	11	13	13
2 days a week	4	7	6	7	11
1 day a week	2	5	3	4	7
At least once a fortnight	-	1	1	1	1
At least once a month	1	2	1	2	3
At least once a year	1	2	1	1	4
Not used in last year	1	5	2	3	11
Never used	3	3	2	3	7

LTDS data in this report excludes children aged under five.

The proportion of Londoners aged 65 and over who walk at least once a week to complete small errands (73 per cent) is largely in line with the 78 per cent of all Londoners. However, people aged 65 and over are far less likely to walk for other purposes listed compared with all Londoners [18].

### Walking at least once a week by purpose of journey (2018) [18]

% who walk at least once a week	All	65+
<b>Base</b>	<b>(946)</b>	<b>(130)</b>
• To complete small errands such as getting a newspaper or posting a letter	78	73
• As part of a longer journey	69	52
• To visit pubs/restaurants/cinemas and other social places	57	31
• To visit friends and relatives	51	28
• To get to work/school/college	50	2
• To take a child to school	32	2

## 6.10 Bus

Bus use at least once a week among Londoners aged 65 and over is 65 per cent, higher than the proportion for all Londoners (59 per cent). Use of the bus among older Londoners continues to be higher among those aged between 65 and 79 (68 per cent use the bus at least once a week) and then decreases among Londoners aged 80 or over (56 per cent) [11].

### Frequency of travelling by bus (2016/17) [11]

%	All	65+	65-69	70-79	80+
<b>Base</b>	<b>(17,560)</b>	<b>(2,691)</b>	<b>(770)</b>	<b>(1,273)</b>	<b>(648)</b>
5 or more days a week	26	20	20	23	15
3 or 4 days a week	12	20	22	21	15
2 days a week	11	15	14	15	16
1 day a week	11	10	10	9	11
At least once a fortnight	7	5	6	5	4
At least once a month	10	7	8	7	6
At least once a year	14	10	10	11	9
Not used in last year	6	10	6	7	20
Never used	4	3	2	2	5

LTDS data in this report excludes children aged under five.

People over 60 years old are significantly less likely to use the bus for work purposes, during the day or night. They're more likely to use the bus for shopping, personal business and visiting friends/relatives, both during the day and at night [27].

### Purpose of bus journey by age and time of day (2014) [27]

%	During the day		At night	
	All	60+	All	60+
<b>Base (weighted)</b>	<b>(37,585)</b>	<b>(4,933)</b>	<b>(9,121)</b>	<b>(263)</b>
To/from or for work	53	20	53	39
To/from school/education	7	1	4	2
To/from shopping	11	33	1	6
Visiting friends/relatives	9	12	13	18
Leisure	9	16	21	19
Personal business	7	13	2	7
Other purpose	3	6	6	9

## 6.11 Car

Forty-three per cent of Londoners aged 65 or over drive a car at least once a week (45 per cent in 2013/14) and 41 per cent travel as a passenger in a car (45 per cent in 2013/14) [11].

Sixty per cent of Londoners aged 65 and over hold a full car driving licence (58 per cent in 2013/14), which is slightly lower than the figure for Londoners overall; 65 per cent of all Londoners aged 17 or over (64 per cent in 2013/14). The proportion of older Londoners who hold a full car driving licence reduces with age: 72 per cent of 65 to 69-year-olds hold a full driving licence compared with 63 per cent of those aged 70-79, and 37 per cent of people aged over 80 (compared with 74 per cent, 58 per cent and 37 per cent respectively in 2013/14) [11].

### Proportion of Londoners with a full car driving licence (2016/17) [11]

%	All (17+)	65+	65-69	70-79	80+
<b>Base</b>	<b>(14,899)</b>	<b>(2,691)</b>	<b>(770)</b>	<b>(1,273)</b>	<b>(648)</b>
Holds a full car driving licence	65	60	72	63	37

LTDS data in this report excludes children aged under five.

Household access to a car reduces with age; 61 per cent of Londoners aged 65 and over have a car in their household compared with 65 per cent across all Londoners; both proportions consistent with those observed in 2013/14. Among Londoners aged 65-69, access to a car in the household is higher at 70 per cent (73 per cent in 2013/14) and this drops to 65 per cent among Londoners aged 70-79 (63 per cent in 2013/14), and 43 per cent for Londoners aged 80 and over (also 43 per cent in 2013/14) [11].

**Proportion of Londoners in a household with access to a car (2016/17)  
[11]**

%	All	65+	65-69	70-79	80+
<b>Base</b>	<b>(17,560)</b>	<b>(2,691)</b>	<b>(770)</b>	<b>(1,273)</b>	<b>(648)</b>
0 cars	35	39	30	35	57
1 car	44	44	45	47	38
2+ cars	21	17	25	17	5

LTDS data in this report excludes children aged under five.

After the age of 80, older people tend to drive less frequently. Driving can provide a sense of self-worth through independence and equality with other Londoners, freedom through greater accessibility and convenience, and enjoyment of the act itself. Therefore giving up driving is an important and emotional event [46].

‘When I relinquish my car, it will be like my snail shell on my back is being taken away.’ (Driver aged 65+) [46]

Among those aged 60 and over who do not drive<sup>5</sup>, the most common reasons for not doing so are a lack of interest (45 per cent), availability of friends and family to drive them instead (30 per cent), a focus on feeling too old (24 per cent) and being concerned about safety (19 per cent) [47].

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<sup>5</sup> Note that these data are for Great Britain and not London specifically.

## Reasons for not driving by age (England) (2016) [47]

%	All 17+	60+
<b>Base</b>	<b>(2,811)</b>	<b>(899)</b>
Not interested in driving	30	45
Family/friends can drive me when necessary	25	30
Too old	8	24
Safety concerns/nervous about driving	15	19
Physical difficulties/disabilities/health problems	11	13
Other forms of transport available	16	11
Cost of buying a car	21	9
Cost of learning to drive	26	8
Busy/congested roads	6	7
Cost of insurance	19	6
Other reason	6	4
Other general motoring costs	7	3
Put off by theory/practical test	5	2
Environmental reasons	2	1
Too busy to learn	9	1

Based on individuals aged 17 and over who do not hold a full driving licence and are not currently learning to drive.

## 6.12 Tube

Twenty-eight per cent of Londoners aged 65 and over use the Tube at least once a week, up from 23 per cent in 2013/14. However, this remains considerably lower than Londoners overall (41 per cent). The proportion using the Tube at least once a week decreases further with age, from 36 per cent of Londoners aged 65-69, to 28 per cent among 70 to 79-year-olds and 15 per cent for those aged 80 and over (compared with 33 per cent, 25 per cent and 11 per cent respectively in 2013/14) [11].

### Frequency of travelling by Tube (2016/17) [11]

%	All	65+	65-69	70-79	80+
<b>Base</b>	<b>(17,560)</b>	<b>(2,691)</b>	<b>(770)</b>	<b>(1,273)</b>	<b>(648)</b>
5 or more days a week	17	4	5	3	2
3 or 4 days a week	7	7	9	8	3
2 days a week	8	8	10	8	4
1 day a week	9	9	11	9	6
At least once a fortnight	8	8	11	8	5
At least once a month	15	11	15	10	8
At least once a year	23	23	22	25	20
Not used in last year	8	23	13	21	41
Never used	6	7	4	6	11

LTDS data in this report excludes children aged under five.

## 6.13 Cycling

Four per cent of Londoners aged 65 and over used a bike to get around London in the last 12 months [16]. Note that we do not currently have data to analyse this age group further.

### Proportion of Londoners who cycle (autumn 2017) [16]

%	All	65+
<b>Base</b>	<b>(2,367)</b>	<b>(314)</b>
Cyclist (used a bike to get around London in the last 12 months)	17	4
Non-cyclist (not used a bike to get around London in the last 12 months)	83	96

The proportion of Londoners aged 65 and over who can ride a bike (74 per cent) remains lower than the total population of Londoners (81 per cent) [16].

### Proportion of Londoners able to ride a bike (autumn 2017) [16]

%	All	65+
<b>Base</b>	<b>(2,367)</b>	<b>(314)</b>
Can ride a bike	81	74
Cannot ride a bike	19	26

We have developed a behavioural change model to look at Londoners' readiness to cycle or cycle more. Londoners aged 65 and over are most likely to self-categorise as being in the 'pre-contemplation' stage (defined in the behaviour model table below); 90 per cent put themselves in this category, compared with 66 per cent of Londoners overall. This data is broadly in line with that seen in November 2014 (87 per cent and 69 per cent respectively) [16].

A very small proportion (three per cent) of Londoners aged 65 and over classify themselves as being in the 'sustained change' category, meaning that they started cycling a while ago and are still doing it occasionally or regularly. This is half the proportion reported in November 2014 (six per cent) [16].

## Behaviour change model cycling (autumn 2017) [16]

%	All	65+
<b>Base</b>	<b>(2,367)</b>	<b>(314)</b>
<b>Pre-contemplation:</b> 'I have never thought about it but would be unlikely to start in the future' 'I have thought about it but don't intend starting in the future' 'I have never thought of starting but could be open to it in the future'	66	90
<b>Contemplation:</b> 'I am thinking about starting in the future'	10	4
<b>Preparation:</b> 'I have decided to start soon'	5	-
<b>Change:</b> 'I have tried to start recently but am finding it difficult' 'I have started recently and am finding it quite easy so far'	2	-
<b>Sustained change:</b> 'I started a while ago and am still doing it occasionally' 'I started a while ago and am still doing it regularly'	9	3
<b>Lapsed:</b> 'I started doing this but couldn't stick to it'	7	2

### 6.14 Cycling schemes

Awareness of Cycle Hire among Londoners aged 65 and over is 85 per cent. This is similar to awareness among all Londoners, which stands at 80 per cent. Despite this, just six per cent of Londoners aged 65 and over have actually used the scheme compared with 27 per cent of all Londoners [16].

Seven per cent of Londoners aged 65 or over intend to use Cycle Hire in the future (compared with 28 per cent of all Londoners who are not members of the scheme) [16].

Evidence suggests older Londoners are less likely to check for availability of bicycles and/or spaces before hiring a bicycle (25 per cent of people aged over 55 always or usually check for bicycle availability, compared with 39 per cent of people aged 16-34) [48].

### Expected use of Cycle Hire in the future (autumn 2017) [16]

%	All	65+
<b>Base (non-members)</b>	<b>(1,165)</b>	<b>(171)</b>
Yes definitely/probably	28	7
Yes, definitely	14	3
Yes, probably	14	5
No, probably not	15	12
No, definitely not	38	73
Not sure	19	7

Seventy-three per cent of older Londoners are aware of Cycleways, which is higher than the figure for all Londoners (65 per cent). Seven per cent of older

Londoners say that they are likely to use Cycleways in the future, compared with 28 per cent of all Londoners [16].

### Expected use of Cycleways (autumn 2017) [16]

%	All	65+
<b>Base</b>	<b>(1,266)</b>	<b>(172)</b>
Yes definitely/probably	28	7
Yes, definitely	12	2
Yes, probably	15	5
No, probably not	15	12
No, definitely not	36	72
Not sure	21	8

## 6.15 Dial-a-Ride

Dial-a-Ride members tend to have an older age profile than disabled Londoners overall. Eighty-two per cent of Dial-a-Ride members are aged 65 and over, compared with 41 per cent of all disabled Londoners. Fifty-eight per cent of members are aged 80 and over, compared with 16 per cent of all disabled Londoners [30, AB].

Users of the service are more likely to be women (72 per cent) [29].

### Dial-a-Ride membership by age (2016) [2, 30]

%	All disabled Londoners (Census)	Dial-a-Ride members (43,683)
Under 20	7	1
20-34	9	2
35-49	19	4
50-64	25	11
65-79	25	24
80-89	8	36
90+	8	22

Where the proportion of Dial-a-Ride members does not add up to 100 per cent, this is owing to no age being listed for the member on file.

## 6.16 Journey purpose

The proportion of weekday journeys made for different purposes varies by age.

- Thirty-one per cent of journeys are work-related for all Londoners (travelling to/from usual workplace, or 'other work-related' travel) whereas only eight per cent of older Londoners' (aged 65 and over) weekday journeys are for this purpose (seven per cent in 2013/14)



- Fifty-one per cent of older Londoners' journeys are for shopping and personal business, compared with 22 per cent for all Londoners (52 per cent and 24 per cent respectively in 2013/14)
- Leisure journeys make up 30 per cent of weekday trips for older Londoners aged 65 and over, compared with 20 per cent for all Londoners (in 2013/14 the respective proportions were 31 per cent and 23 per cent) [11]

### Weekday journey purpose (2016/17) [11]

%	All	65+	65-69	70-79	80+
<b>Base – all trips by Londoners</b>					
Shopping/personal business	22	51	43	51	67
Usual workplace	22	5	8	4	-
Leisure	20	30	31	31	25
Education	20	1	2	1	1
Other work-related	9	3	4	3	-
Other	7	10	11	10	8

LTDS data in this report excludes children aged under five.

## 6.17 Ticket types

Older Londoners aged 65 and over are less likely than all Londoners to pay for public transport using any of the options available. This is certainly linked to very high proportions in this age group making use of the Freedom Pass, meaning people aged 65 or over are far less likely to pay to use public transport [30].

### Methods used to pay for public transport (2018) [30]

%	All	65+
<b>Base: All Londoners:</b>	<b>(750)</b>	<b>(74)</b>
Oyster pay as you go	53	13
Contactless payment (card)	47	14
Contactless payment (phone)	12	2
Paper ticket for single / return journey	18	8
Paper Travelcard (daily, weekly, monthly)	13	5
Oyster Travelcard	34	25
Net: Oyster	72	36
Net: Contactless	49	14

As respondents could select more than one ticket type, totals may equal more than 100 per cent.

These ticket options were available at the time of the survey but may have changed since. The latest ticketing information is available at [tfl.gov.uk/fares/](https://tfl.gov.uk/fares/)

## Travelcards

Very few older Londoners have an Oyster card compared with the proportion of all Londoners: eight per cent of Londoners aged 65 or over (six per cent in 2013/14) compared with 60 per cent all Londoners. Londoners aged 65-69 are more likely to have an Oyster card than people aged over 80: 12 per cent for 65 to 69-year-olds compared with three per cent of Londoners aged 80 or over (nine per cent and three per cent respectively in 2013/14) [11].

Ninety-three per cent of 65-year-olds or over have an older person's Freedom Pass (92 per cent in 2013/14). This drops to 91 per cent for those aged 80 or over (87 per cent in 2013/14) [11].

### Possession of an Oyster card or Freedom Pass (2016/17) [11]

%	All	65+	65-69	70-79	80+
<b>Base</b>	<b>(17,560)</b>	<b>(2,691)</b>	<b>(770)</b>	<b>(1,273)</b>	<b>(648)</b>
Have an Oyster card	60	8	12	8	3
Older person's Freedom Pass	15	93	93	94	91
Disabled person's Freedom Pass	1	-	-	-	-

LTDS data in this report excludes children aged under five. Oyster card ownership excludes Freedom Passes, Oyster photocards and Zip cards.

## 6.18 Barriers

We have conducted several research programmes to investigate the barriers faced by Londoners when using public transport and their findings are in general agreement. However, the issue is complex and the specific questions that we ask Londoners may have an influence upon their responses. The impact of specific barriers may also be much more significant for some Londoners than others.

With increasing age, some older people become less active. Reduced activity levels are often connected to changing lifestyles, expectations and confidence levels. Accessible transport can help people to maintain a more active lifestyle [49].

### Barriers to greater public transport use

When presented with a number of possible barriers to using public transport more often, the greatest, cited by 42 per cent of Londoners aged 65 years and over (compared with 48 per cent of all Londoners) is concern about overcrowded services. [13].

A number of the barriers to greater public transport use that affect all Londoners are less likely to impact people aged 65 and over. For example, slow journey times was mentioned by 28 per cent of all Londoners, compared with 20 per cent of Londoners aged 65 and over. Conversely, incidents

relating to antisocial behaviour are more likely to be cited by older Londoners [13]. We address safety and security issues in more detail later in this section.

Cost of tickets is mentioned by 10 per cent of older Londoners as a barrier to greater public transport use; this increases to 41 per cent of all Londoners [13]. This is likely to reflect the high use of older people's Freedom Passes among Londoners aged 65 and over [13].

### Barriers to using public transport more often (2017/18) [13]

%	All Londoners	65+
<b>Base</b>	<b>(6,167)</b>	<b>(778)</b>
Overcrowding/cramped conditions	48	42
Cost of travel	41	10
Disruptions to the service	31	26
Slow journey times	28	20
Passengers pushing and shoving each other	26	23
Unreliable services	24	19
Strikes	23	22
Schoolchildren/youths behaving badly	21	26
Drunken passengers/being aggressive/intimidation	21	19
Dirty environment on the bus/train	20	13
Frequency of the services	19	18
Concern about terrorist attacks	18	13
Concern about being a victim of crime on the bus/ Tube/ train (robbery, assault or pickpocketing)	14	11
Concern about being a victim of crime getting to and waiting for the bus/Tube/train (robbery, assault or pickpocketing)	14	12
Dirty environment getting to the bus/train	14	10

As respondents could select more than one answer, totals may equal more than 100 per cent.

## 6.19 Safety and security

Looking at the levels of concern about personal security when using public transport in London, Londoners aged 65 or over are significantly less likely to say they are worried (either 'quite worried' or 'very worried') than all Londoners (14 per cent of older Londoners compared with 30 per cent all Londoners) [13].

## Levels of concern about personal security when using public transport in London (2017/18) [13]

%	All Londoners	65+
<b>Base</b>	<b>(6,167)</b>	<b>(778)</b>
Not at all worried	21	36
A little bit worried	44	46
Quite a bit worried	24	12
Very worried	6	2
NET: Worried	30	14
Don't know	5	4

Experience of worrying incidents on public transport in the past three months is much lower among Londoners aged 65 and over than for all Londoners. Thirteen per cent of Londoners aged 65 and over said they had experienced a specific incident of worry in the past three months, compared with 32 per cent of all Londoners [13].

The cause of worrying incidents in the past three months is broadly similar among Londoners aged 65 and over and all Londoners who experienced such events. However, Londoners aged 65 and over are more likely to cite incidents of antisocial behaviour as worrying, including specific aspects such as passengers pushing and shoving each other, schoolchildren behaving badly and passengers drinking alcohol. Lack of staff and lack of police presence are also more likely to cause concern among older Londoners than at a total level [13].

Among those who experienced a worrying event, Londoners aged 65 and over were far less likely than all Londoners to take immediate action as a result. Eighteen per cent of older Londoners took immediate action after the worrying incident, compared with 46 per cent of all Londoners. Action taken tended to be either a change to another form of transport (eight per cent of older Londoners and 29 per cent of all Londoners) or they stopped making the journey altogether (10 per cent of older Londoners and 17 per cent of all Londoners) [13].

The longer-term impact of worrying incidents is also less pronounced among older Londoners in comparison to all Londoners. Seven per cent of older Londoners said they stopped travelling on the form of transport on which they experienced the worrying incident either temporarily (five per cent) or completely (two per cent). This is lower than the 16 per cent of all Londoners who were put off travelling by that particular method either temporarily (12 per cent) or completely (four per cent) [13].

## 6.20 Unwanted sexual behaviour

Londoners aged 65 and over are significantly less likely than all Londoners to have experienced unwanted sexual behaviour while using public transport in the Capital. One per cent of older Londoners said they had personally

experienced unwanted sexual behaviour compared with 10 per cent of all Londoners [13].

### Experience of unwanted sexual behaviour when using public transport in past 12 months (2017/18) [13]

%	All Londoners	65+
<b>Base</b>	<b>(6,167)</b>	<b>(778)</b>
Yes	10	1
No	87	98
Would rather not say	3	*

## 6.21 Hate crime

Londoners aged 65 and over are significantly less likely than all Londoners to have experienced hate crime targeted at themselves or witnessed it targeted at others in the past year (eight per cent of older Londoners compared with 22 per cent of all Londoners) [13].

### Experience of hate crime when using public transport in past 12 months (2017/18) [13]

%	All Londoners	65+
<b>Base</b>	<b>(6,167)</b>	<b>(778)</b>
NET: Yes	22	8
Yes, targeted at me	7	2
Yes, targeted at someone else/others	16	7
No	74	91
Would rather not say	4	1

The type of behaviours experienced or witnessed were mostly similar among older Londoners and all Londoners, with the most common being verbal insults (mentioned by 82 per cent of older Londoners and 70 per cent of all Londoners), physical intimidation (22 per cent of older Londoners and 35 per cent of all Londoners) and spitting (mentioned by nine per cent of older Londoners and 16 per cent of all Londoners) [13].

There are some clear distinctions between Londoners aged 65 and over and all Londoners in the perceived motivation for incidents of hate crime experienced or witnessed on public transport in the past 12 months. Older Londoners were more likely to cite their age or alcohol as the perceived motivation, whereas they were less likely to think it was related to race/ethnicity or religion/belief [13].

As with incidents of unwanted sexual behaviour, most instances of hate crime tend to go unreported. This is particularly the case among Londoners aged 65 and over, with 94 per cent not reporting the incident (compared with 72 per cent of all Londoners) [13].

## 6.22 Customer satisfaction

### 6.22.1 Overall satisfaction

We measure overall satisfaction with various types of transport in London on an 11-point scale, with 10 representing extremely satisfied and zero representing extremely dissatisfied. We then scale this up to 100). For virtually all of the transport types in the following list, Londoners aged 65 and over give higher overall satisfaction mean scores than all Londoners.

We have standardised satisfaction ratings, which are shown in the following table. This allows us to apply consistent analysis across a wide range of satisfaction research.

Average rating	Level of satisfaction
Under 50	Very low/weak/poor
50-54	Low/weak/poor
55-64	Fairly/relatively/quite low/weak/poor
65-69	Fair/reasonable
70-79	Fairly/relatively/quite good
80-84	Good or fairly high
85-90	Very good or high
90+	Excellent or very high

Older people aged 65 and over are more satisfied with every mode of London transport compared with all Londoners, except Victoria Coach Station for which the same rating was given. Their ratings are excellent or very high for most modes when compared with all customers, whose ratings out of 100 are up to eight points lower. The differences in satisfaction ratings are most marked for TfL Rail, black cabs, London Overground and trams.

## Overall satisfaction with transport types – all customers (2016/17) [15]

Satisfaction score (0-100)	All	65+
<b>Bus services</b>		
Base	(13,032)	(2,653)
Satisfaction score	86	89
<b>TfL Rail</b>		
Base	(4,955)	(332)
Satisfaction score	83	91
<b>Underground</b>		
Base	(16,947)	(1,409)
Satisfaction score	85	88
<b>Overground</b>		
Base	(13,209)	(499)
Satisfaction score	84	89
<b>DLR</b>		
Base	(12,243)	(380)
Satisfaction score	89	91
<b>Dial-a-Ride</b>		
Base	(1,457)	(1,192)
Satisfaction score	84	85
<b>London River Services</b>		
Base	(1,040)	(76)
Satisfaction score	90	92
<b>Black cabs</b>		
Base	(513)	(64)
Satisfaction score	84	92
<b>Trams</b>		
Base	(3,841)	(774)
Satisfaction score	90	94
<b>Victoria Coach Station</b>		
Base	(1,312)	(114)
Satisfaction score	81	81
<b>TLRN</b>		
Base	(9,592)	(823)
Satisfaction score	69	70

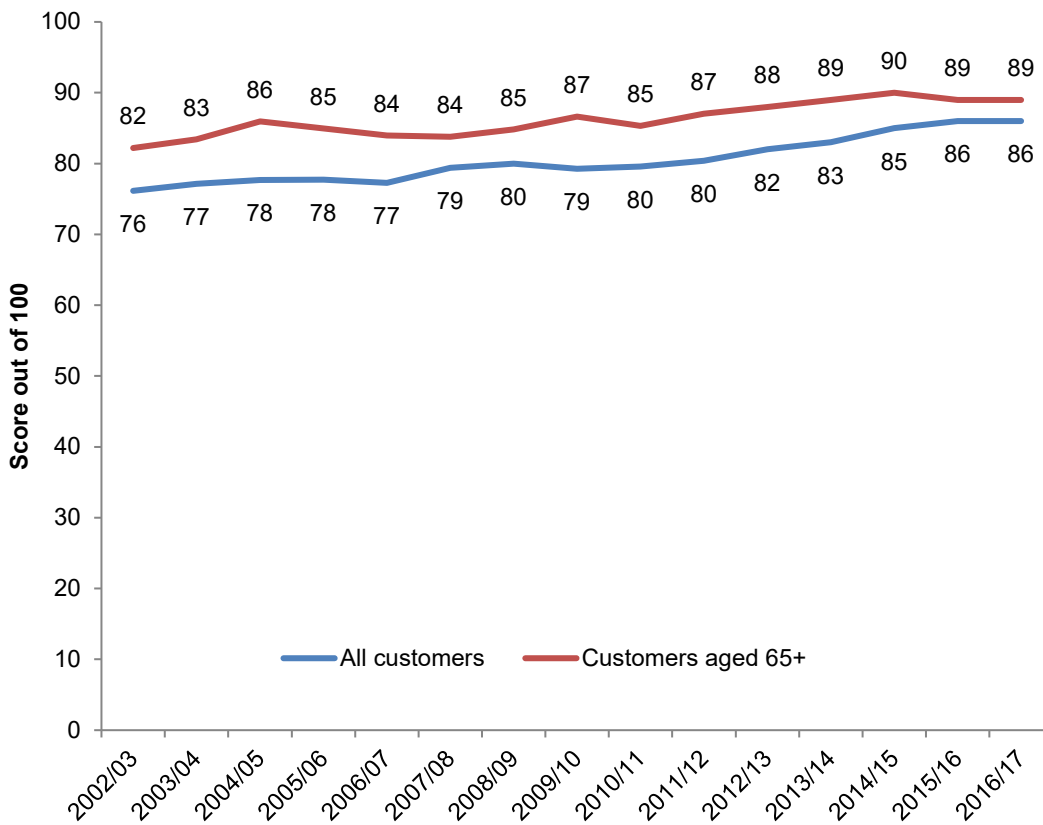
Satisfaction is not shown for Private Hire Vehicles and Night buses due to small base sizes.

### 6.22.2 Bus

Overall satisfaction among bus users aged 65 and over is rated very good or high at 89 out of 100, compared with 86 out of 100 for customers overall (90 and 85 out of 100 respectively in 2013/14) [15].

Overall satisfaction over time is consistently high among customers aged 65 and over, and satisfaction levels are higher than those given by customers overall, although the gap has narrowed in the past two years [15].

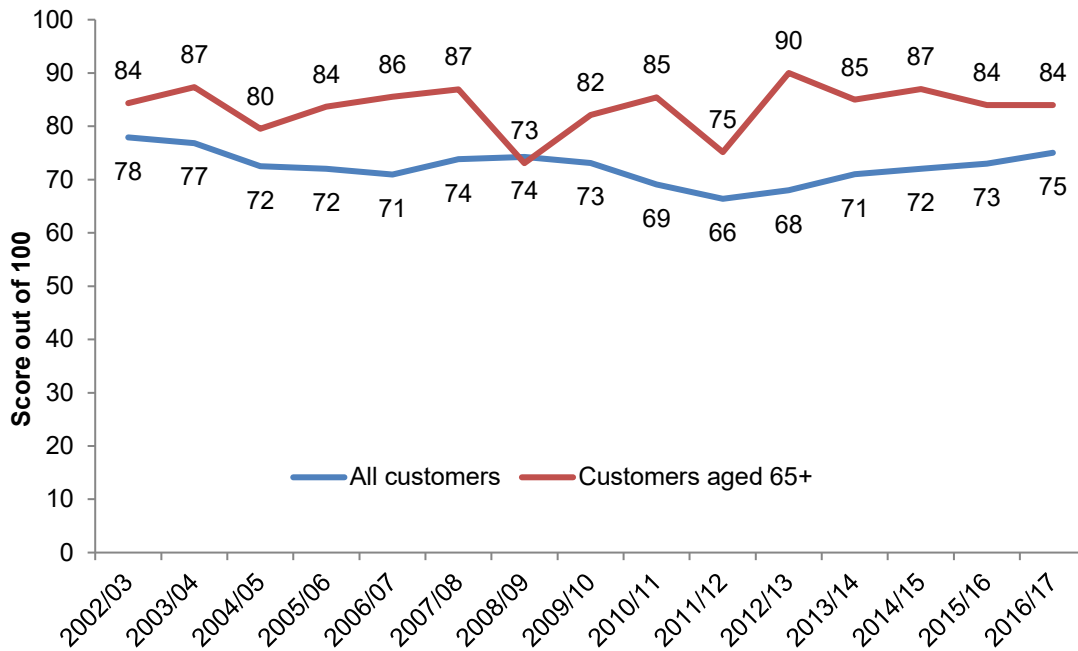
#### Overall satisfaction with buses over time [15]





Satisfaction with value for money of bus services is also high among older customers, with a score of 84 out of 100 compared with 75 out of 100 from all customers [15]. Satisfaction at a total level has increased steadily since 2011/12, while older customers' satisfaction ratings have levelled off somewhat after a substantial increase in 2012/13. It is worth noting that older Londoners are generally entitled to free travel on the bus and as such the base size for satisfaction with value for money scores is lower than for overall satisfaction.

**Satisfaction with value for money with buses over time [15]**



There are some differences with other elements concerning buses. Customers aged 65 and over are more satisfied with the provision of information while travelling (a score of 93 out of 100 for 65-year-olds and over compared with 90 out of 100 for all customers) [15].

## Drivers of satisfaction

Overall satisfaction with bus services is driven by similar factors for both all customers and those aged 65 and over. Driver behaviour and attitude is one of the top five factors that affect satisfaction for older customers [15].

### Drivers of satisfaction for bus users [15]

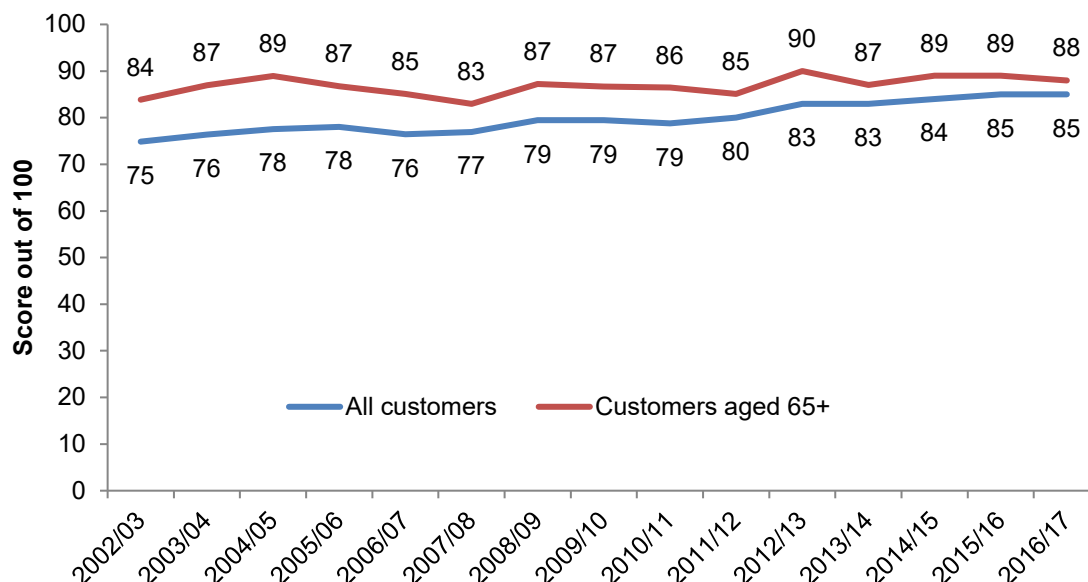
All customers	65+
Journey time	Time waited to catch bus
Ease of making journey	Ease of making journey
Time waited to catch bus	Journey time
Comfort inside the bus	Driver's behaviour and attitude
Driver approachability and helpfulness	Driver approachability and helpfulness

### 6.22.3 Tube

Customers aged 65 and over who use the Tube rate it as very good or high for overall satisfaction (88 out of 100), a higher result than for customers overall (85 out of 100) [15].

Overall satisfaction scores for the past 10 years show that people aged 65 and over are consistently more satisfied with the Tube than customers overall, although the difference is now the smallest it has ever been [15].

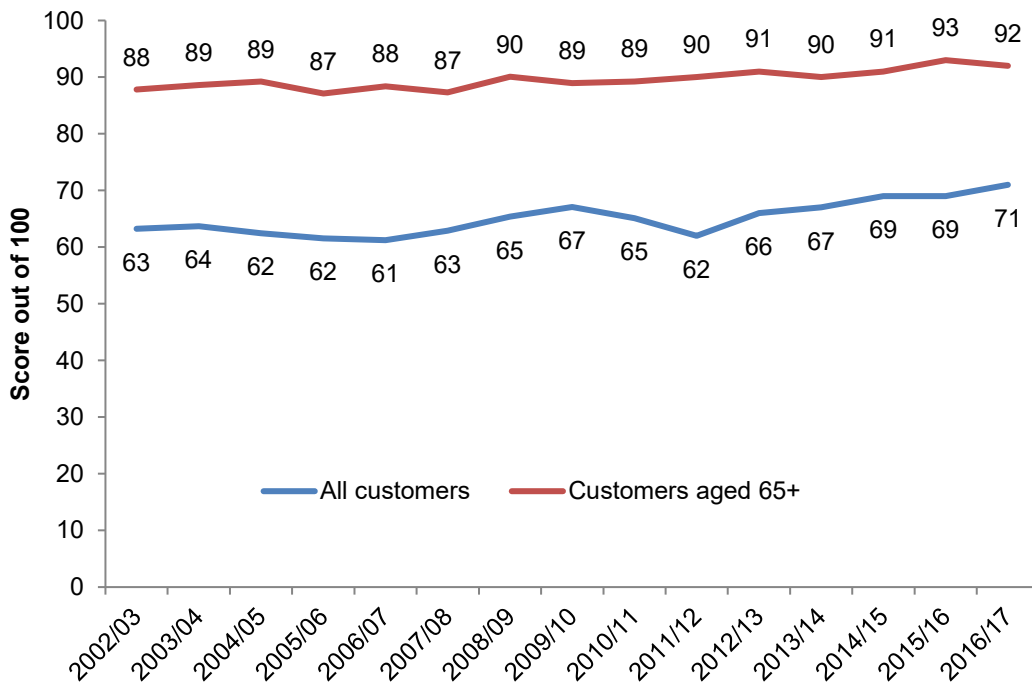
### Overall satisfaction with the Tube over time [15]



As with overall satisfaction, satisfaction with value for money is consistently higher among customers aged 65 and over than customers overall (in the

latest year this was 92 out of 100 among 65-year-olds and over compared with 71 out of 100 for all customers) [15].

### Satisfaction with value for money with the Tube over time [15]



### Drivers of satisfaction

Our analysis of the factors that drive satisfaction among Tube users shows that for customers aged 65 and over comfort of journeys, ease of making journeys and length of time waited for the train are all important. These factors are very similar to the drivers for all Londoners. The table below shows the top drivers of satisfaction for customers overall and customers aged 65 and over [15].

### Drivers of satisfaction for Tube users [15]

All customers	65+
Ease of making journey	Ease of making journey
Comfort of journey	Comfort of journey
Length of journey time	Length of time waited for train
Length of time waited for train	Helpfulness of PA
Train crowding	Smoothness of journey

## 6.22.4 Overground

As with other types of transport, customers aged 65 and over rate the Overground as very good/high on average (89 out of 100). This remains higher than the proportion of customers overall (84 out of 100) [15].

### Overall satisfaction with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	65+
<b>Base 2016/17</b>	<b>(13,209)</b>	<b>(499)</b>
2009/10	73	82
2010/11	80	86
2011/12	82	85
2012/13	82	90
2013/14	82	89
2014/15	83	90
2015/16	84	90
2016/17	84	89

Older customers continue to be much more satisfied with value for money on the Overground than customers overall (92 out of 100 among customers aged 65 or over compared with 73 out of 100 all customers) [15].

### Satisfaction with value for money with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	65+
<b>Base 2016/17</b>	<b>(12,491)</b>	<b>(450)</b>
2011/12	72	88
2012/13	71	90
2013/14	70	93
2014/15	73	92
2015/16	73	93
2016/17	73	92

### Drivers of satisfaction

Analysis of what leads to satisfaction among Overground users shows that for customers aged 65 and over, condition and state of repair, feeling valued as a customer, provision of information and ease of making the journey are important factors. Ease of making the journey, feeling valued as a customer and information about service disruptions are also important issues for all customers [15].

## Drivers of satisfaction for Overground users [15]

All customers	65+
Ease of making your journey	Condition and state of repair
Feel valued as a customer	Feel valued as a customer
This train running on time	General information about train times and routes at the station
Information about service disruptions on the train	Information about service disruptions given at the station
Comfort of the train	Ease of making your journey

### 6.22.5 Docklands Light Railway (DLR)

Overall satisfaction with the DLR is rated very high among customers aged 65 and over and is higher than with customers overall (91 out of 100 among customers aged 65 and over compared with 89 out of 100 for all customers). Older customers' satisfaction does appear to be on a slight downward trend after reaching a peak of 93 in both 2013/14 and 2014/15 [15].

#### Overall satisfaction with DLR over time – all customers [15]

Satisfaction score (0-100)	All	65+
<b>Base 2016/17</b>	<b>(12,243)</b>	<b>(380)</b>
2009/10	81	88
2010/11	81	90
2011/12	82	89
2012/13	87	92
2013/14	87	93
2014/15	89	93
2015/16	89	92
2016/17	89	91

Older customers are more satisfied with value for money on the DLR than customers overall (92 out of 100 compared with 79 out of 100) [15].

#### Satisfaction with value for money with DLR over time – all customers [15]

Satisfaction score (0-100)	All	65+
<b>Base 2016/17</b>	<b>(11,554)</b>	<b>(351)</b>
2011/12	72	89
2012/13	74	91
2013/14	75	93
2014/15	77	91
2015/16	78	91
2016/17	79	92

## Drivers of satisfaction

Journey time, ease of making the journey, length of waiting time, feeling valued as a customer and ease of getting on the train are key drivers of overall satisfaction among DLR users aged 65 and over. The main drivers of satisfaction are similar for all DLR customers [15].

### Drivers of satisfaction for DLR users [15]

All customers	65+
Ease of making your journey	Length of journey time
Comfort of the train	Ease of making your journey
Reliability of trains	Length of time waited for the train
Length of journey time	Feeling valued as a customer
Ease of getting on the train	Ease of getting on the train

### 6.22.6 Dial-a-Ride

Older customers who use the Dial-a-Ride service rate it as very good, giving the service an overall satisfaction score of 85 out of 100. However, this is the lowest rating since observation began [15].

#### Overall satisfaction with Dial-a-Ride over time – all customers [15]

Satisfaction score (0-100)	65+	65-69	70-79	80-89	90+
<b>Base 2016/17</b>	<b>(1,192)</b>	<b>(76)</b>	<b>(315)</b>	<b>(608)</b>	<b>(193)</b>
2009/10	92	90	91	92	93
2010/11	92	87	90	93	93
2011/12	91	87	90	92	92
2012/13	93	89	92	94	93
2013/14	93	91	92	93	94
2014/15	93	90	92	93	94
2015/16	89	85	87	90	92
2016/17	85	80	82	87	87

Dial-a-Ride customers tend to be happier with various individual measures relating to the service, with cleanliness of the vehicle and helpfulness and courtesy of the driver both rated as excellent with scores of 95 out of 100 [15].

### 6.22.7 Trams

Overall satisfaction with trams is very high among customers at 90 out of 100. This continues to be higher among older users (94 out of 100 for 65-year-olds) [15].

#### Overall satisfaction with trams over time – all customers [15]

Satisfaction score (0-100)	All	65+
<b>Base 2016/17</b>	<b>(3,841)</b>	<b>(774)</b>
2009/10	86	91
2010/11	85	92
2011/12	86	93
2012/13	89	91
2013/14	89	94
2014/15	89	93
2015/16	90	93
2016/17	90	94

### 6.22.8 Streets

Although older Londoners give higher satisfaction ratings than all Londoners on the various types of transport, older Londoners are less satisfied when it comes to their latest walking journey in the Capital. Londoners aged 65 and over gave a satisfaction rating of 65 for the streets and pavements on their last journey made on foot compared with all Londoners' rating of 69 out of 100. Satisfaction with their most recent car journey is the same for those aged 65 and over and all Londoners (63 out of 100) [33].

#### Overall satisfaction with streets and pavement after last journey over time – walking journey [33]

Satisfaction score (0-100)	All	65+
<b>Base 2018</b>	<b>(951)</b>	<b>(176)</b>
2017	69	65
2018	69	65

#### Overall satisfaction with streets and pavements after last journey over time - car journey [33]

Satisfaction score (0-100)	All	65+
<b>Base 2018</b>	<b>(870)</b>	<b>(169)</b>
2017	63	62
2018	63	63

There is insufficient sample to detail satisfaction results with cycling.

### 6.22.9 Transport for London Road Network (TLRN)

Satisfaction with the TLRN is reasonable to fairly good. Older users of the TLRN give a score of 67 out of 100 for walking, 77 out of 100 for travelling by bus on red routes and 71 out of 100 for driving. Satisfaction levels for walking and driving are slightly higher among 65-year-olds and over for the TLRN than for all customers [15].

#### Overall satisfaction – general impression of red routes over time [15]

Satisfaction score (0-100)	All	65+
<b>Walking</b>		
Base 2016/17	(3,432)	(291)
2013/14	70	71
2014/15	68	80
2015/16	68	70
2016/17	68	67
<b>Travelling by bus</b>		
Base 2016/17	(1,375)	(151)
2013/14	69	72
2014/15	71	74
2015/16	71	77
2016/17	72	77
<b>Driving</b>		
Base 2016/17	(2,286)	(328)
2013/14	67	70
2014/15	67	70
2015/16	70	72
2016/17	69	71



## 6.23 Access to information

### 6.23.1 Access to the internet

Online Londoners aged 65 and over are less likely to access the internet in certain places than all online Londoners. Forty-one per cent of online Londoners aged 65 and over access the internet 'on the move', compared with 81 per cent of all online Londoners. Internet access at work is even more disparate, with just 16 per cent of online Londoners aged 65, considerably lower than all online Londoners (66 per cent) [14].

#### Use of the internet (autumn 2017/spring 2018) [14]

%	All	65+
<b>Base (online Londoners)</b>	<b>(2,062)</b>	<b>(322)</b>
Access at home	100	100
Access 'on the move'	81	41
Access at work	66	16

The top reasons for using the internet are broadly the same for all groups. The main reasons are:

- Email (99 per cent Londoners aged 65 or over compared with 96 per cent Londoners overall)
- Finding and sourcing information (92 per cent compared with 91 per cent overall)
- Buying goods and services (92 per cent compared with 90 per cent overall)
- Maps and directions (84 per cent compared with 90 per cent overall) [14]

However, for a number of functions older online Londoners use the internet far less than online Londoners overall:

- Accessing live public transport information (70 per cent compared with 82 per cent overall)
- Banking (70 per cent compared with 82 per cent overall)
- Watching video content (53 per cent compared with 80 per cent overall)
- Social media and networking (51 per cent compared with 79 per cent overall)
- Making day to day travel plans (48 per cent compared with 71 per cent overall)
- Sharing photos (42 per cent compared with 67 per cent overall) [14]

### 6.23.2 Device usage and behaviour

Fifty per cent of online Londoners aged 65 and over use a smartphone compared with 84 per cent of all online Londoners [14].

#### Proportion of Londoners who use a smartphone (iPhone, BlackBerry, Android, other) (autumn 2017/spring 2018) [14]

%	All	65+
<b>Base (online Londoners)</b>	<b>(2,062)</b>	<b>(322)</b>
Uses a smartphone	84	50

Ownership of mobile devices is lower among online Londoners aged 65 and over than all online Londoners, although it has increased over time:

- Fifty-one per cent use a tablet computer (compared to 63 per cent of all online Londoners)
- Eight per cent use a standard mobile phone (compared to 12 per cent of all online Londoners)
- Use of travel-related apps is much lower among online Londoners aged 65 and over who have a mobile device compared to all online Londoners (20 per cent compared with 45 per cent respectively) [14]

### 6.23.3 Using the TfL website

Use of TfL's website is lower among older online Londoners than all online Londoners. Seventy-five per cent of online Londoners aged 65 and over use the site, compared with 89 per cent of all online Londoners [14].

In line with the lower use among older online Londoners, users aged 65 and over tend to visit the website less frequently than all users. Only 12 per cent of online Londoners aged 65 or over use it three to four times a week or daily, compared with 44 per cent of all online Londoners [14].

#### Frequency of visiting the TfL website (autumn 2017/spring 2018) [14]

%	All	65+
<b>Base (online Londoners)</b>	<b>(2,062)</b>	<b>(322)</b>
Use the TfL website	89	75
Daily	27	5
Up to 3-4 times a week	17	7
Up to 3-4 times a month	20	22
About once a month	11	17
Less than once a month	14	24
Never	11	25

The most common use of the TfL website for online Londoners aged 65 and over is for journey planning (65 per cent). However, given that most 65-year-olds or over have an older person's Freedom Pass, it is perhaps unsurprising that they are far less likely to use the TfL website for ticketing (10 per cent, compared with 30 per cent of all online Londoners), or for budgeting purposes (one per cent, compared with 19 per cent of all online Londoners) [14].

### Reasons for visiting the TfL website (autumn 2017/spring 2018) [14]

%	All	65+
<b>Base (online Londoners)</b>	<b>(2,062)</b>	<b>(322)</b>
Journey planning	76	65
Ticketing (information and buying)	30	10
Viewing maps	29	29
Budgeting	19	1
Information about roads	12	11
Information about cycling	4	1

As respondents could select more than one answer, totals may equal more than 100 per cent.

#### 6.23.4 Accessing travel information in the event of travel disruption

Many older and disabled people tell us they would like more accurate real-time information, particularly if lifts go out of service. They also tell us real-time information while on the move is critical to help when journeys are disrupted. We are looking at solutions that will help provide better support while people are on their journey [63].

We have launched a 'turn up and go' functionality in the staff app that allows staff to send messages to other stations when customers need assistance and to record when assets, such as lifts, go out of service. We have also produced laminated posters for all stations so they can easily use these to let customers know, via the whiteboard, if a lift is out of service at a station [63].

Bespoke customer information has been developed for each station with a lift, which can be displayed to help customers. This could show an alternative route through the station or travel options. It also tells staff where to place the information, for example previously they might have added a sign at the broken lift when in fact it is far more useful at the gate line [63].

Older online Londoners are just as likely to obtain real-time London transport information during problems or delays (95 per cent of Londoners aged 65 and over would do this compared with 96 per cent all Londoners) [14].

Older online Londoners are less likely to access real-time London transport information via digital sources, but more likely to speak to staff (61 per cent compared with 41 per cent of all online Londoners) or to consult announcements or displays (74 per cent compared with 59 per cent of all online Londoners) [14].

## 7 Younger people

### Key findings

- Younger Londoners under the age of 25 make up 32 per cent of the Capital's population. Among BAME Londoners, 41 per cent are under 25 [2]
- Londoners aged under 25 make fewer weekday trips than Londoners overall (2.1 compared with 2.4 for all Londoners) [11]
- Walking is the most commonly used type of transport by younger Londoners (97 per cent aged 24 and under walk at least once a week compared with 95 per cent all Londoners) [11]
- Younger Londoners cite similar barriers to greater public transport use as all Londoners: overcrowding, slow journey times and cost, although the latter two are more likely to be deterrents for Londoners aged 16 to 24 years old than for Londoners overall [13]
- Londoners aged 16-24 are significantly more likely than average to feel worried about their personal security and to have experienced a recent worrying episode when using public transport [13]
- Younger Londoners' satisfaction with public transport continues to be in line with that given by Londoners as a whole [15]
- Younger online Londoners are more likely to own a smartphone than online Londoners overall (96 per cent compared with 84 per cent) [14]

## **7.1 Summary – Younger People**

### **7.1.1 Research with younger people**

The research that we present in this chapter includes a range of age groups, and we have noted the specific age ranges covered for each data source.

This chapter focuses on Londoners under the age of 25. However, travel patterns and priorities vary considerably within this age group as school stage and the desire for independence changes [51].

### **7.1.2 Profile of younger Londoners**

Londoners aged under 25 make up 32 per cent of the population. Twenty per cent are aged 15 or under, and 12 per cent are aged between 16 and 24 [2].

Within this younger age group (under 25) the proportion of boys/men and girls/women is practically equal; 49 per cent are girls/women [2].

Younger Londoners are more likely to be from a BAME group than all Londoners. Fifty-four per cent of 0 to 15-year-olds and 48 per cent of 16 to 24-year-olds are from a BAME group [2].

Younger people are more likely to be in education (49 per cent of 16 to 24-year-olds) and less likely to be in full or part-time employment than all Londoners (39 per cent of 16 to 24 year olds are in work compared with 53 per cent of all Londoners) [11].

### **7.1.3 Transport behaviour**

Younger Londoners tend to make fewer trips than all Londoners on an average weekday (2.1 among Londoners under 25 compared with 2.4 all Londoners) [11].

- Walking is the most commonly used type of transport for younger Londoners, with 97 per cent aged 24 and under walking at least once a week [11]
- The bus is the next most commonly used transport type for younger Londoners. Among Londoners aged 11-15, 75 per cent use the bus at least once a week, compared with 59 per cent of all Londoners [11]
- Travelling as a car passenger is a frequently used method of transport for younger Londoners, especially for under 16-year-olds (75 per cent of five to 10-year-olds and 72 per cent of 11 to 15-year-olds are car passengers at least once a week) [11]
- Londoners under the age of 25 are less likely than Londoners overall to use the Tube (32 per cent under 25 compared with 41 per cent) and National Rail (12 per cent compared with 17 per cent) at least once a week. However, among 16 to 24-year-olds, use of the Tube (52 per cent) and National Rail (19 per cent) is higher than across all under 25-year-olds [11]
- Forty-seven per cent of journeys made by Londoners under the age of 25 are for education compared with 20 per cent for Londoners overall [11]

- Among 16 to 24-year-olds the proportion making journeys for work-related reasons is slightly lower than the proportion of all Londoners making these trips (29 per cent compared with 31 per cent for all Londoners) [11]
- Younger Londoners are much more likely than all Londoners to possess a pass or card that entitles them to free or reduced travel (30 per cent aged under 25 possess a free bus travel pass compared with nine per cent of all Londoners). This is particularly high for people aged 11-15 (74 per cent possess a free travel bus pass) [11]

The most common way to travel to school is to walk. Forty-five per cent of people aged under 16 walk as their main way of getting to school. This rises to 54 per cent for young people aged 10 and under [11]. Younger age groups tend to live closer to school, with five to 10-year-olds travelling 1.5 miles on average to reach school, compared with 3.2 miles for 11 to 16-year-olds [50].

#### **7.1.4 Barriers**

Overcrowding, slow journeys and cost are the three most common barriers to greater public transport use cited by younger Londoners. Although these deterrents are similar for all Londoners cost of travel and slow journey times are significantly more likely to be barriers for younger Londoners than they are for Londoners as a whole:

- Cost of travel (50 per cent of younger Londoners compared with 41 per cent of all Londoners)
- Slow journey times (37 per cent compared with 28 per cent) [13].

Younger Londoners aged between 16 and 24-years-old are significantly more likely to feel worried about their personal security (ie being safe from crime or antisocial behaviour) when travelling by public transport in the Capital. Thirty-five per cent of younger Londoners are worried (either 'quite worried' or 'very worried') about their personal security, compared with 30 per cent of all Londoners [13].

Additionally, younger Londoners are more likely to have experienced a specific worrying incident on public transport in the past three month (40 per cent compared with 32 per cent of all Londoners) [13].

#### **7.1.5 Customer satisfaction**

Levels of satisfaction among 16 to 24-year-old customers on the transport network are in line with all customers' scores, with very few differences in the levels we observed [15].

- Overall satisfaction with buses is very good at 85 out 100. The key drivers of overall satisfaction with buses among younger customers are how long the journey took, ease of making journeys and the comfort inside the bus [15]

- Tube satisfaction is also high at 86 out of 100. Satisfaction among younger Tube users is driven largely by ease of making journeys, comfort and journey time [15]
- Younger Londoners' satisfaction with value for money is consistently lower than overall satisfaction for all transport types [15]

### 7.1.6 Access to information

Access to the internet 'on the move' or while at work is considerably more common among young online Londoners compared to online Londoners overall. The use of smartphones among online Londoners aged 16-24 is very high (96 per cent compared with 84 per cent all Londoners) [14].

Among online Londoners aged 16-24, 88 per cent claim to access the TfL website, in line with all online Londoners (89 per cent) [14].

The most common use of the TfL website for online Londoners aged 16 to 24 years old is for journey planning (68 per cent), although this is significantly lower than the proportion of all online Londoners (76 per cent). Younger online Londoners are also considerably less likely than online Londoners overall to use the TfL website for viewing maps (21 per cent, compared with 29 per cent) or for obtaining information about roads (five per cent, compared with 12 per cent) [14].

## 7.2 Introduction

For many younger people, travel represents a gateway to adulthood, enabling independence, socialisation and a recognition of maturity. Children may be accessing transport with an adult, but as they get older they start to travel more with friends and on their own [51].

Combined with the high proportion of younger people in education rather than employment, this means that travel patterns can differ from the wider London population.

Throughout this chapter, we focus on Londoners under the age of 25. Where possible, we have broken data down to reveal differences by those aged 5-10, 11-15 and 16-24. In some cases, data is not available to provide this breakdown and therefore age groups are shown as close to this breakdown as possible.

The differences highlighted between young people in this chapter may well be influenced by a number of factors other than age, with gender, income, working status and education all affecting perceptions towards travel in London and travel behaviour.

Market research best practice imposes limitations when interviewing people under the age of 16. While some surveys do include this audience (after parental permission is gained) many limit themselves to those aged 16 or over. Throughout the report, we have noted the ages covered by each data

point. LTDS data reported in this document does not include results from children under five years old.

### 7.3 Profile of younger Londoners

Thirty-two per cent of the London population is aged 24-years-old or under, 20 per cent are 15-years-old and under, and 12 per cent are aged between 16 and 24-years-old [2].

#### Age profile of Londoners (2011 Census) [2]

%	2011 Census	Proportion who are girls/ women
0-4	7	49
5-9	6	49
10-15	7	49
16-24	12	50
25-64	57	50
65+	11	56

While for Londoners in older age groups there is a higher proportion of women than men, in younger age groups the proportions are more even, with 49 per cent of Londoners aged under 25 being girls or women and 51 per cent being boys or men [2].

The main differences between all Londoners and younger Londoners relate to ethnicity, working status and disability levels. Among younger Londoners (aged under 25), 51 per cent are BAME Londoners compared with 40 per cent of all Londoners. With each progressively younger age group, the proportion of BAME Londoners increases [2]. While nine per cent of all Londoners define themselves as disabled, the figure for Londoners aged under 25 is three per cent [11].

Within this document there are two main sources of demographic data: the ONS 2011 Census and the LTDS. The following table shows the demographic breakdown of Londoners recorded in the LTDS. Data from both sources are in line with each other. However, there may be differences to specific reported numbers or proportions between sources owing to methodological and timing differences.



### LTDS demographic profile of younger Londoners (2016/17) [11]

%	All Londoners	Aged 24 and under	5-10	11-15	16-24
<b>Base</b>	<b>(17,560)</b>	<b>(4,437)</b>	<b>(1,477)</b>	<b>(990)</b>	<b>(1,970)</b>
<b>Gender</b>					
Men	50	51	51	53	50
Women	50	49	49	47	50
<b>Ethnicity</b>					
White	62	53	49	49	56
BAME	37	46	48	50	42
<b>Household income</b>					
Less than £10,000	12	14	13	16	14
£10,000–£19,999	16	18	18	18	17
£20,000–£34,999	20	21	20	22	21
£35,000–£49,999	15	14	14	12	14
£50,000–£74,999	15	13	13	11	13
£75,000+	23	21	22	21	20
<b>Working status*</b>					
Working full-time	44				33
Working part-time	9				6
Student	7				49
Retired	13				-
Not working	12				11
<b>Disabled</b>					
Yes	9	4	3	5	4
No	91	96	97	95	96
<b>Impairment affects travel</b>					
Yes	8	3	3	3	3
No	92	97	97	97	97

\*LTDS data in this report excludes children aged under five and working status does not include under-16s.

All TfL surveys use the Equality Act 2010 to define disabled people as those who define themselves as having a long-term physical or mental disability or health issue that impacts on their daily activities, the work they can do, or limits their ability to travel.

### 7.3.1 Ethnicity

One of the largest differences in the profile of younger Londoners compared with all Londoners is in terms of ethnicity. This is particularly evident for Londoners under 16; 54 per cent of this age group are BAME Londoners [2].

Children aged 0-15 are considerably more likely to be from the African ethnic group than all Londoners; 11 per cent of children aged 0-15 living in London are from the African ethnic group compared with seven per cent of all Londoners [2].

#### Ethnicity by age [2]

Ethnic group %	All	Age group		
		0-15	16-24	0-24
<b>White: total</b>	<b>60</b>	<b>46</b>	<b>53</b>	<b>49</b>
English/Welsh/Scottish/Northern Irish/British	45	36	41	38
Irish	2	1	1	1
Gypsy or Irish Traveller	-	-	-	-
Other white	13	9	11	10
<b>Black/African/Caribbean/black British: total</b>	<b>13</b>	<b>19</b>	<b>15</b>	<b>17</b>
African	7	11	8	10
Caribbean	4	4	4	4
Other black	2	4	2	3
<b>Asian/Asian British: total</b>	<b>18</b>	<b>20</b>	<b>22</b>	<b>21</b>
Indian	7	5	7	6
Pakistani	3	4	4	4
Bangladeshi	3	4	4	4
Chinese	2	1	3	2
Other Asian	5	5	5	5
<b>Mixed/multiple ethnic group: total</b>	<b>5</b>	<b>11</b>	<b>7</b>	<b>9</b>
White and black Caribbean	1	3	2	3
White and black African	1	2	1	1
White and Asian	1	3	2	2
Other Mixed	1	3	2	2
<b>Other ethnic group: total</b>	<b>3</b>	<b>4</b>	<b>4</b>	<b>4</b>
Arab	1	2	2	2
Any other ethnic group	2	2	2	2
<b>BAME: total</b>	<b>40</b>	<b>54</b>	<b>47</b>	<b>51</b>

## 7.4 Employment and income

According to the LTDS, 49 per cent of 16 to 24-year-old Londoners are students, 33 per cent are employed full-time and six per cent are employed part-time [11]. Data from the Census shows that a similar proportion of younger Londoners are employed full-time. However, the Census indicates more part-time and economically inactive Londoners than the data from LTDS [2]. This is likely to be owing to the different definitions of employment status and economic activity between the two datasets.

### Census economic activity among Londoners aged 16+ [2]

%	All Londoners	16-24
Full-time employment	46	26
Part-time employment	16	18
Unemployed	6	12
Economically inactive	33	44

Younger Londoners are marginally more likely to have a lower household income than all Londoners. Among Londoners aged under 25, 32 per cent have household income of less than £20,000, compared 28 per cent of all Londoners [11].

## 7.5 London boroughs

### London boroughs with the highest proportion of younger residents [11]

Borough	% of younger residents (aged 24 or under)
Barking and Dagenham	34
Newham	32
Tower Hamlets	30
Camden	29
Ealing	29
Hillingdon	29
Redbridge	29

LTDS data in this report excludes children aged under five.

## London boroughs with the lowest proportion of younger residents [11]

Borough	% of younger residents
Kensington and Chelsea	23
Richmond upon Thames	23
Wandsworth	23
Havering	24
Islington	24
Merton	24

LTDS data in this report excludes children aged under five.

## 7.6 Travel behaviour

Younger Londoners tend to make fewer trips per weekday than Londoners overall. Londoners aged under 25 make an average of 2.1 weekday trips compared with 2.4 trips per weekday made by all Londoners.

### Average number of weekday trips (2016/17) [11]

	Average number of weekday trips
Londoners aged 5-10	2.3
Londoners aged 11-15	2.0
Londoners aged 16-24	2.0
Londoners aged 5-24	2.1
All Londoners	2.4

## 7.7 Transport types used

Walking is the most common type of transport used by younger Londoners (aged under 25); the vast majority (97 per cent) walk at least once a week [11].

After walking, travelling by bus is the most common transport option for both all and younger Londoners; 59 per cent of all Londoners use the bus at least once a week compared with 66 per cent of those aged under 25. The bus is even more popular among 16 to 24-year-olds, with 76 per cent using them each week [11].

Travelling by car as a passenger continues to decrease as younger Londoners achieve greater independence. Around three-quarters of under-16s (74 per cent) travel by car as a passenger each week compared with 48 per cent of those aged 16 to 24 [11].

For both National Rail and the Underground, higher proportions of people aged 16-24 use these types of transport at least once a week than all Londoners. For National Rail, 17 per cent of all Londoners use the service at least once week compared with 19 per cent for those aged 16-24. For the

Underground, 41 per cent of all Londoners use the service at least once a week compared to 52 per cent of 16 to 24-year-olds [11].

### Proportion of Londoners using types of transport at least once a week (2016/17) [11]

%	All	Aged 24 and under	5-10	11-15	16-24
<b>Base</b>	<b>(17,560)</b>	<b>(4,437)</b>	<b>(1,477)</b>	<b>(990)</b>	<b>(1,970)</b>
Walking	95	97	97	98	96
Bus	59	66	44	75	76
Car (as a passenger)	44	62	75	72	48
Tube	41	32	14	16	52
Car (as a driver)	38	7	-	-	15
National Rail	17	12	3	7	19
Overground	12	10	4	6	15
Other taxi/minicab (private hire vehicle)	10	9	4	3	14
DLR	5	5	2	3	7
London taxi/black cab	3	1	0	1	2
Tram	2	3	2	4	3
Motorbike	1	-	-	-	1

LTDS data in this report excludes children aged under five. As respondents could select more than one answer, totals may equal more than 100 per cent.

Where there is more detailed information on individual types of transport, we have included a sub-section below.

## 7.8 Walking

Almost all Londoners walk at least once a week. Younger Londoners are more likely to walk almost every day (five or more days a week) with 90 per cent of Londoners aged under 25 stating this compared with 84 per cent of all Londoners [11].

### Frequency of walking (2016/17) [11]

%	All	Aged 24 and under	5-10	11-15	16-24
<b>Base</b>	<b>(17,560)</b>	<b>(4,437)</b>	<b>(1,477)</b>	<b>(990)</b>	<b>(1,970)</b>
5 or more days a week	84	91	89	96	90
3 or 4 days a week	5	3	4	1	3
2 days a week	4	2	3	1	1
1 day a week	2	1	1	-	2
At least once a fortnight	-	-	-	-	-
At least once a month	1	-	-	-	1
At least once a year	1	-	-	-	-
Not used in last year	1	-	-	-	1
Never used	3	3	3	1	3

LTDS data in this report excludes children aged under five.

We asked Londoners how often they walk for various purposes. The table below compares the proportions of all Londoners and 16 to 24-year-old Londoners making each type of walking journey at least once a week. A higher proportion of 16 to 24-year-olds make every type of journey at least once a week, except running errands and to visit pubs, restaurants or other social places [18].

**Walking at least once a week by purpose of journey (2018) [18]**

<b>% who walk at least once a week</b>	<b>All</b>	<b>16-24</b>
<b>Base</b>	<b>(946)</b>	<b>(89)</b>
• As part of a longer journey	69	71
• To complete small errands such as getting a newspaper or posting a letter	78	76
• To get to work/school/college	50	71
• To visit friends and relatives	51	61
• To visit pubs/restaurants/cinemas and other social places	57	49
• To take a child to school	32	37

As respondents could select more than one answer, totals may equal more than 100 per cent.

**7.9 Bus**

Regular bus use is common among younger Londoners. Seventy-six per cent of Londoners under 25 years old use the bus at least once a week and 42 per cent use the bus almost every day (five or more times a week) [11]. For some young people, the bus offers a more social form of transport (while not being as expensive as other social types of transport such as the Tube) [51].

‘We like to get the bus because you can catch up and have a good chat.’ (Girl, 15 years old)

‘We just like hanging out with our friends on the back of the bus.’ (Boy, 15 years old) [51]

## Frequency of travelling by bus (2016/17) [11]

%	All	Aged 24 and under	5-10	11-15	16-24
<b>Base</b>	<b>(17,560)</b>	<b>(4,437)</b>	<b>(1,477)</b>	<b>(990)</b>	<b>(1,970)</b>
5 or more days a week	26	35	14	51	42
3 or 4 days a week	12	10	6	7	14
2 days a week	11	9	9	7	10
1 day a week	11	12	15	11	10
At least once a fortnight	7	6	9	5	5
At least once a month	10	9	16	7	6
At least once a year	14	12	21	7	7
Not used in last year	6	3	4	3	3
Never used	4	4	6	3	3

LTDS data in this report excludes children aged under five.

Londoners aged 16-19 are more likely to travel by bus for school or education and to visit friends and relatives both during the day and at night, compared to all bus users. However, they are less likely to travel by bus for work purposes than bus users overall [27].

## Purpose of bus journey by age and time of day (2014) [27]

%	During the day		At night	
	All	Aged 16-19	All	Aged 16-19
<b>Base (weighted)</b>	<b>(37,585)</b>	<b>(3,574)</b>	<b>(9,121)</b>	<b>(862)</b>
To/from or for work	53	22	53	28
To/from school/education	7	36	4	13
To/from shopping	11	8	1	2
Visiting friends/relatives	9	13	13	20
Leisure	9	11	21	23
Personal business	7	5	2	6
Other purpose	3	5	6	10

## 7.10 Car

Travelling as a passenger in a car is common among younger Londoners. Three fifths (62 per cent) travel this way at least once a week. Travelling by car as a passenger is much more frequent among Londoners under the age of 16; 74 per cent of Londoners aged between five and 15 are car passengers at least once a week [11].

Thirty-five per cent of Londoners aged 17-24 hold a full driving licence; this compares to 69 per cent of all Londoners [11].

### Proportion of Londoners aged 17 and over with a full car driving licence (2016/17) [11]

%	All	17-24	25+
<b>Base</b>	<b>(14,899)</b>	<b>(1,776)</b>	<b>(13,123)</b>
Holds a full car driving licence	65	35	69

Londoners aged 16-24 are less likely to live in a household with access to a car (60 per cent compared with 65 per cent of all Londoners). Younger Londoners however - aged between five and 16 years old - are more likely to have access to car (74 per cent) [11].

### Proportion of Londoners in a household with access to a car (2016/17) [11]

%	All	5-16	16-24
<b>Base</b>	<b>(17,560)</b>	<b>(2,467)</b>	<b>(1,970)</b>
0 cars	35	26	40
1 car	44	53	34
2+ cars	21	21	26

LTDS data in this report excludes children aged under five.

## 7.11 Tube

Thirty-two per cent of younger Londoners use the Tube at least once a week, which is lower than the proportion for all Londoners (41 per cent). Broadly, the propensity to use the Tube at least once a week among younger Londoners continues to increase with age: 16 to 24-year-olds are the most likely to use the Tube at least once a week (52 per cent compared with 16 per cent of 11 to 15-year-olds and 14 per cent of five to 10-year-olds) [11].

### Frequency of travelling by Tube (2016/17) [11]

%	All	Aged 24 and under	5-10	11-15	16-24
<b>Base</b>	<b>(17,560)</b>	<b>(4,437)</b>	<b>(1,477)</b>	<b>(990)</b>	<b>(1,970)</b>
5 or more days a week	17	12	2	4	23
3 or 4 days a week	7	5	1	2	9
2 days a week	8	6	3	3	10
1 day a week	9	9	8	7	10
At least once a fortnight	8	8	7	8	8
At least once a month	15	17	22	19	13
At least once a year	23	30	41	42	17
Not used in last year	8	5	6	6	4
Never used	6	8	11	9	5

LTDS data in this report excludes children aged under five.



## 7.12 Cycling

The same proportion of younger Londoners (aged 16-24) as all Londoners sometimes cycle in London: 17 per cent of 16 to 24-year-olds sometimes use a bicycle to get around London. Thirteen per cent of younger Londoners cycle regularly (at least once a week) [16].

### Proportion of Londoners who cycle (autumn 2017) [16]

%	All	16-24
<b>Base</b>	<b>(2,367)</b>	<b>(300)</b>
Cyclist (sometimes uses a bike to get around London)	17	17
Non-cyclist (never uses a bike to get around London)	83	83

Most Londoners know how to ride a bike (81 per cent of all Londoners). The proportion is similar among younger Londoners aged 16-24 (82 per cent can ride a bicycle) [16].

### Proportion of Londoners able to ride a bike (autumn 2017) [16]

%	All	16-24
<b>Base</b>	<b>(2,367)</b>	<b>(300)</b>
Can ride a bike	81	82
Cannot ride a bike	19	18

We have developed a behavioural change model to look at Londoners' readiness to cycle or cycle more. Sixty-one per cent of younger Londoners classified themselves as being in the 'pre-contemplation' category (defined in the following table), compared with 66 per cent of all Londoners. These proportions are similar to those seen in November 2014 (64 per cent and 69 per cent respectively) [16].

A higher proportion of younger Londoners are in the 'contemplation' phase (14 per cent of 16 to 24-year-olds compared with 10 per cent of all Londoners); this phase relates to thinking about cycling (more) soon (15 per cent and 10 per cent respectively in November 2014) [16].

A slightly lower proportion of 16-24-year-olds to all Londoners (six per cent compared with nine per cent) are classified as being in the 'sustained change' category, meaning that they started cycling (more) a while ago and are still doing it occasionally or regularly (nine per cent and 10 per cent respectively in November 2014) [16].

## Behaviour change model of cycling (autumn 2017) [16]

%	All	16-24
<b>Base</b>	<b>(2,367)</b>	<b>(300)</b>
<b>Pre-contemplation:</b> 'I have never thought about it but would be unlikely to start in the future' 'I have thought about it but don't intend starting in the future' 'I have never thought of starting but could be open to it in the future'	66	61
<b>Contemplation:</b> 'I am thinking about starting in the future'	10	14
<b>Preparation:</b> 'I have decided to start soon'	5	7
<b>Change:</b> 'I have tried to start recently but am finding it difficult' 'I have started recently and am finding it quite easy so far'	2	2
<b>Sustained change:</b> 'I started a while ago and am still doing it occasionally' 'I started a while ago and am still doing it regularly'	9	6
<b>Lapsed:</b> 'I started doing this but couldn't stick to it'	7	9

Among younger people who do not cycle, there are several perceived barriers. For some people aged 16-19, cycling is strongly associated with childhood and therefore they are keen to distance themselves from this youthful association. For others, using a bike to travel can limit spontaneity and is less sociable than other transport types such as the bus. Other possible barriers focus on the cost of buying and maintaining a bike, and the possibility of getting dirty/messing up clothing and hair through cycling [52].

A key barrier to younger Londoners cycling, particularly younger children, is the perceived safety of the cycling environment by parents. This remains a strong barrier, even when the parent perceives their child to be a skilful cyclist [54].

### 7.13 Cycling schemes

Almost three in four Londoners aged between 16 and 24 are aware of Cycle Hire (71 per cent), but this is a little bit lower than the proportion of all Londoners (80 per cent) [16].

Thirty-two per cent of casual Cycle Hire users (defined as not having a Cycle Hire key) are aged between 16 and 24 but only six per cent of members are aged 16-24 [53].

Thirty-four per cent of younger Londoners say that they are likely to use Cycle Hire in the future, a higher proportion than Londoners overall (28 per cent) [16].

### Expected use of Cycle Hire in future (autumn 2017) [16]

%	All	16-24
<b>Base (non-members)</b>	<b>(1,165)</b>	<b>(155)</b>
Yes definitely/probably	28	34
Yes, definitely	14	13
Yes, probably	14	21
No, probably not	15	21
No, definitely not	38	19
Not sure	19	26

Awareness of Cycleways among younger Londoners is lower than among all Londoners; 51 per cent of Londoners aged 16-24 are aware of the scheme, compared with 65 per cent of all Londoners [16].

Expected future use of Cycleways is the same for younger Londoners (aged 16-24) as for all Londoners; 28 per cent say that they are likely to use Cycleways in the future compared with 28 per cent of all Londoners [16].

### Expected use of Cycleways (autumn 2017) [16]

%	All	16-24
<b>Base</b>	<b>(1,266)</b>	<b>(176)</b>
Yes definitely/probably	28	28
Yes, definitely	12	6
Yes, probably	15	22
No, probably not	15	22
No, definitely not	36	21
Not sure	21	29

## 7.14 Journey purpose

Travel choices are thought to change through two major stages in younger people's lives. The first transition occurs with the shift from primary to secondary education. Main influences on travel choices at this stage are to do with independence and peer influence. For many young people, travel enables independence, socialisation and recognition of maturity. Younger Londoners aged between 11 and 15 increasingly travel on their own, although they may have limited knowledge of public transport [51].

When people reach the age of 16 to 18, travel becomes less orientated around having fun and is perceived as a means to an end, at which point practicalities (such as cost and speed of journey) become more important in determining travel choices [51].

Nearly two-thirds of the journeys made by Londoners aged between five and 15 are for education-related reasons. Shopping and personal business trips are more common among Londoners aged 16-24 than those under 16 [11].

Among Londoners aged 16-24, 20 per cent of weekday journeys are to travel to and from a usual place of work and a further nine per cent are for other work-related reasons [11].

### Weekday journey purpose (2016/17) [11]

%	All	Aged 24 and under	5-10	11-15	16-24
<b>Base – all trips by Londoners</b>					
Shopping/personal business	22	13	11	11	14
Usual workplace	22	9	-	-	20
Leisure	20	21	19	15	26
Education	20	47	62	69	26
Other work-related	9	4	-	-	9
Other	7	6	7	4	5

LTDS data in this report excludes children aged under five.

### Travel to/from school

The most common form of transport to and from school among Londoners aged under 16 continues to be walking. Forty-five per cent of school journeys are made on foot [11].

Walking is more common among children aged between 5 and 10 than those aged between 11 and 15 (54 per cent among five to 10-year-olds compared with 31 per cent among 11 to 15-year-olds) [11].

The proportion of younger Londoners using the bus to get to and from school also continues to change between children aged 5-10 and 11-15; 10 per cent of five to 10-year-olds use the bus to travel to and from school compared with 43 per cent of 11 to 15-year-olds [11].

The next most common form of transport to and from school is the car (as a passenger). Travelling by car is more common for younger children (28 per cent of five to 10-year-old Londoners compared with 13 per cent of 11 to 15-year-olds) [11].

### Main types of travel to school (2016/17)[11]

%	5-15	5-10	11-15
<b>Base</b>	<b>(2,467)</b>	<b>(1,477)</b>	<b>(990)</b>
Walking	45	54	31
Bus	23	10	43
Car (as a passenger)	22	28	13
Tube	2	1	3
Cycling	2	2	2

\*LTDS data in this report excludes children aged under five.

The average length of a journey to school more than doubles from 1.5 miles among five to 10-year-olds to 3.2 miles among 11 to 16-year-olds [50].

## Average length of journey to/from school for Londoners (2016) [50]

Miles	5-10	11-16
Average length of trip	1.5	3.2

### 7.15 Ticket types

Younger Londoners have a variety of ticket options available to them:

- Under five years old – travel free with a paying adult
- Five to 10-year-olds – travel free with a paying adult or free with a 5-10 Zip Oyster photocard. Fares are applied on most National Rail services. However, a 5-10 Oyster photocard can be obtained that enables a discounted child rate which is cheaper than paying cash
- Eleven to 15-year-olds – free travel on buses and trams and pay child fares on all other TfL services and some National Rail services with an 11-15 Zip Oyster photocard. Eleven to 15-year-old visitors to London can get half adult-rate pay as you go travel on bus, Tube, tram, DLR, London Overground, TfL Rail and most National Rail services for up to 14 days with an Oyster or Visitor Oyster card. After 14 days the discount expires and the Oyster card reverts to charging adult-rate fares
- Children aged five to 15 pay child rate fares on the Emirates Air Line if travelling with an adult. Children aged 5-15 can also buy an Off-Peak Zones 1-9 Day Travelcard for £2.30 if they travel with an adult who had a valid:
  - Gold Card
  - Network Railcard or Family and Friends Railcard
  - HM Forces Railcard
- Sixteen to 18-year-olds who live in a London borough can travel free on buses and trams, and also use pay as you go at half the adult rate on all our other services (subject to specific age and full-time education status criteria)
- Students aged 18 years old and above receive a reduction of 30 per cent against adult rate Travelcards, bus and tram passes
- Apprentices receive a reduction of 30 per cent against adult rate Travelcards, bus and tram passes

Londoners aged 16-24 are more likely than all Londoners to use an Oyster payment option (81 per cent compared with 72 per cent). Conversely, use of contactless options is lower among Londoners aged 16-24 than all Londoners (42 per cent of 16-24s, compared with 49 per cent of all Londoners) [30].

## Methods used to pay for public transport (2018) [30]

%	All	16-24
<b>Base: All Londoners</b>	<b>(750)</b>	<b>(116)</b>
Oyster pay as you go	53	62
Contactless payment (card)	47	40
Oyster Travelcard	12	40
Paper ticket single/return	18	17
Paper Travelcard	13	13
Contactless payment (mobile device)	34	14
Net: Oyster	72	81
Net: Contactless	49	42

As respondents could select more than one ticket type, totals may equal more than 100 per cent.

These ticket options were available at the time of the survey but may have changed since. The latest ticketing information is available here: <https://tfl.gov.uk/fares/>

The proportion of 16 to 24-year-olds with an Oyster card is 79 per cent – higher than all Londoners (60 per cent of all Londoners have an Oyster card). Young people under 16 are considerably less likely to have an Oyster card (31 per cent of 11 to 15-year-olds have one), continuing to reflect the greater opportunities for free or reduced travel for this age group [11].

## Possession of an Oyster card (2016/17) [11]

%	All	Aged 24 and under	5-10	11-15	16-24
<b>Base</b>	<b>(17,560)</b>	<b>(4,437)</b>	<b>(1,477)</b>	<b>(990)</b>	<b>(1,970)</b>
Have an Oyster card	60	44	4	31	79
Do not have an Oyster card	40	56	96	69	21

LTDS data in this report excludes children aged under five. Oyster card ownership excludes Freedom Passes, Oyster photocards and Zip cards.

Possession of passes/cards entitling the holder to free or reduced travel is higher among under-25s than all Londoners; it is particularly elevated for 11 to 15-year-olds with 74 per cent in possession of a free bus travel pass, although this is lower than the proportion observed in 2013/14 (83 per cent) [11].

This data reflects possession specifically, rather than use of passes/cards for free or reduced travel.

## Possession of pass/card entitling free travel/reduced fares (2016/17) [11]

%	All	Aged 24 and under	5-10	11-15	16-24
<b>Base</b>	<b>(17,560)</b>	<b>(4,437)</b>	<b>(1,477)</b>	<b>(990)</b>	<b>(1,970)</b>
Free bus travel pass	9	30	14	74	20
Free Tube/rail travel pass	2	4	6	7	1
Reduced bus travel pass	2	5	-	3	9
Reduced Tube/rail travel pass	9	19	2	31	25

LTDS data excludes children aged under five.

### 7.16 Barriers

For younger Londoners aged between 16 and 24 years old the issue that they most commonly say prevents them from using public transport more often is overcrowded services. This is also the most commonly mentioned barrier for all Londoners (48 per cent of 16 to 24-year-old Londoners and 48 per cent of all Londoners) [13].

The second most mentioned issue is cost of travel. This barrier is more pronounced among younger Londoners, with half (50 per cent) saying it stops them using public transport more often, compared with 41 per cent of all Londoners. Other areas where a greater proportion of Londoners aged 16-24 report barriers than all Londoners are:

- Slow journey times (37 per cent compared with 28 per cent of all Londoners)
- Strikes (28 per cent compared with 23 per cent)
- Dirty environment on the bus/train (27 per cent compared with 20 per cent)
- Concern about terrorist attacks (23 per cent compared with 18 per cent)
- Dirty environment getting to the bus/train (22 per cent compared with 14 per cent) [13]

## Barriers to using public transport more often (2017/18) [13]

%	All Londoners	16-24
<b>Base</b>	<b>(6,167)</b>	<b>(649)</b>
Overcrowding/cramped conditions	48	48
Cost of travel	41	50
Disruptions to the service	31	33
Slow journey times	28	37
Passengers pushing and shoving each other	26	29
Unreliable services	24	23
Strikes	23	28
Schoolchildren/youths behaving badly	21	24
Drunken passengers/being aggressive/intimidation	21	24
Dirty environment on the bus/train	20	27
Frequency of the services	19	18
Concern about terrorist attacks	18	23
Concern about being a victim of crime on the bus/Tube/train (robbery, assault or pickpocketing)	14	16
Concern about being a victim of crime getting to and waiting for the bus/Tube/train (robbery, assault or pickpocketing)	14	16
Dirty environment getting to the bus/train	14	22

As respondents could select more than one answer, totals may equal more than 100 per cent.

## 7.17 Safety and security

Younger Londoners aged between 16 and 24 years old are significantly more likely to feel worried about their personal security (ie being safe from, crime or antisocial behaviour) when travelling by public transport in the Capital. Thirty-five per cent of younger Londoners are worried (either 'quite worried' or 'very worried') about their personal security, compared with 30 per cent of all Londoners [13].

### Levels of concern about personal security when using public transport in London (2017/18 [13])

%	All Londoners	16-24
<b>Base</b>	<b>(6,167)</b>	<b>(649)</b>
Not at all worried	21	13
A little bit worried	44	46
Quite worried	24	30
Very worried	6	6
NET: Worried	30	35
Don't know	5	6



Additionally, experience of specific worrying incidents on public transport in the past three months is significantly higher among younger Londoners aged 16 to 24 years old than among all Londoners. Forty per cent of younger Londoners said they had experienced a specific incident of worry in the past three months, compared with 32 per cent of all Londoners [13].

The cause of worrying incidents in the past three months is broadly similar among Londoners of all ages who experienced such events. However, there are certain issues that made a significantly greater proportion of younger Londoners feel worried compared to all Londoners, namely:

- Unwanted sexual behaviour (17 per cent compared with nine per cent)
- Getting lost (15 per cent compared with eight per cent) [13]

Among those who experienced a worrying event, a similar proportion of younger Londoners aged 16 to 24 years old and all Londoners took action as a result. Forty-five per cent of younger Londoners took immediate action after the worrying incident, as did 46 per cent of all Londoners. This tended to be either a change to another type of transport (30 per cent of younger Londoners and 29 per cent of all Londoners) or they stopped making the journey altogether (14 per cent of younger Londoners and 17 per cent of all Londoners) [13].

The longer-term impact of worrying incidents is also similar among younger Londoners and all Londoners. Thirteen per cent of younger Londoners said they stopped travelling on the form of transport on which they experienced the worrying incident either temporarily (10 per cent) or completely (four per cent). This is just slightly lower than the 16 per cent of all Londoners who were put off travelling by that method either temporarily (12 per cent) or completely (four per cent) [13].

## 7.18 Unwanted sexual behaviour

Younger Londoners aged 16 to 24-years-old are significantly more likely than Londoners as a whole to have experienced unwanted sexual behaviour while using public transport in the Capital. Eighteen per cent of younger Londoners said they had personally experienced unwanted sexual behaviour compared with 10 per cent of all Londoners. The mean number of incidents experienced in the past three months is the same among younger Londoners (2.7 incidents on average) and all Londoners (2.7 incidents on average) [13].

### Experience of unwanted sexual behaviour when using public transport in past 12 months (2017/18) [13]

%	All Londoners	16-24
<b>Base</b>	<b>(6,167)</b>	<b>(649)</b>
Yes	10	18
No	87	75
Would rather not say	3	7

While the types of unwanted sexual behaviour experienced are largely similar among younger Londoners and all Londoners, significantly greater proportions of younger Londoners were subjected to staring (64 per cent compared with 45 per cent of all Londoners) or wolf-whistling (38 per cent compared with 25 per cent of all Londoners) [13].

Most of those who experienced unwanted sexual behaviour did not report the incident to anyone. Sixty-nine per cent of younger Londoners aged 16 to 24 years old who experienced unwanted sexual behaviour in the past year did not report it, compared with 68 per cent of all Londoners. Younger Londoners were significantly more likely than all Londoners to not report the incident because they felt it was not serious enough (55 per cent of younger Londoners compared with 39 per cent of all Londoners) [13].

## 7.19 Hate crime

Younger Londoners aged 16 to 24 years old are significantly more likely than all Londoners to have experienced hate crime targeted at themselves or witnessed it targeted at others in the past year (29 per cent compared with 22 per cent of all Londoners) [13].

### Experience of hate crime when using public transport in past 12 months (2017/18) [13]

%	All Londoners	16-24
<b>Base</b>	<b>(6,167)</b>	<b>(649)</b>
NET: Yes	22	29
Yes, targeted at me	7	6
Yes, targeted at someone else/ others	16	24
No	74	64
Would rather not say	4	7

The type of behaviours experienced or witnessed were very similar among younger Londoners and all Londoners. The most common being verbal insults (mentioned by 72 per cent of younger Londoners and 70 per cent of all Londoners), physical intimidation (33 per cent of younger Londoners and 35 per cent of all Londoners) and spitting (mentioned by 16 per cent of both groups) [13].

The perceived motivation for incidents of hate crime experienced or witnessed on public transport in the past 12 months was also largely similar among younger Londoners and all Londoners. However, younger Londoners were significantly more likely to feel that the incident was motivated by religion/belief (38 per cent of younger Londoners compared with 29 per cent of all Londoners) [13].

As with incidents of unwanted sexual behaviour, most instances of hate crime tend to go unreported, although reporting was significantly less likely among younger Londoners (65 per cent) than among all Londoners (72 per cent) [13].

### 7.19.1 Disabled teenagers

Our research with disabled teenagers identified that many of their perceived barriers to greater public transport use are also experienced by disabled adults and the wider London population [80]. However, using public transport is seen as part of teenage life and therefore it is both practically and symbolically significant to younger disabled Londoners. It is thought that personality, in many cases, more so than impairments, is important in determining attitudes and behaviour towards public transport use among disabled teenagers [76].

As part of this research, many of the disabled teenagers acknowledged that some solutions to increase transport accessibility are harder to introduce than others (such as ensuring that the Tube is 100 per cent accessible). Solutions that we believe to be more achievable include staff training to ensure that staff acknowledge (and enforce) policies, promotion of travel planning services and ensuring that information on accessibility is kept up to date [76].

### 7.19.2 The use of illegal (unbooked) minicabs

We have run the Safer Travel at Night campaign since 2003, aiming to reduce the use of illegal (unbooked) minicabs. We target our communication campaigns in this area particularly at young women aged between 16 and 34 [35].

We carry out research every year to monitor the use of unbooked minicabs among our target audience and we evaluate the communications campaign to determine its effectiveness.

None of those aged 16-34 used an illegal (unbooked) minicab to reach their onward destination on the night that we interviewed them. This is nearly the same proportion as all of those we interviewed<sup>6</sup> [35].

The future likelihood of using an unbooked minicab stands at 20 per cent for 16 to 34-year-olds [35].

#### The use of illegal (unbooked) minicabs (2016) [35]

%	All	16-34
<b>Use of illegal minicabs</b>		
<b>Base</b>	<b>(526)</b>	<b>(447)</b>
Used an illegal minicab to reach onward destination on night of interview	*	0
Likely to use illegal minicab in future	20	20
Unlikely to use illegal minicab in future	79	79

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<sup>6</sup> The sample for this study comprises people recruited in the queues of popular London late night venues, and is therefore not necessarily reflective of the London population as a whole.

We have included more information on Safer Travel at Night in the chapter on women.

### 7.19.3 Road traffic injuries

Despite a spike in the number of children reported killed or seriously injured in London in 2012, the most up-to-date figures show a return to the declining trend (from 331 in 2007 to 166 in 2014) [17].

#### Number of reported killed or seriously injured child road casualties in London over time [17]

Number	0-15	16-24
2007	331	696
2008	310	665
2009	263	598
2010	250	515
2011	230	510
2012	270	496
2013	187	385
2014	166	360

## 7.20 Changing behaviours

We manage a variety of free programmes to educate children between the ages of three and 19 on safe behaviours and active travel.

### 7.20.1 STARS

At least 95 per cent of London’s schools have a school travel plan that sets out ways to encourage safe and sustainable travel among the whole school community. As part of the Mayor’s Transport Strategy, the STARS (Sustainable Travel: Active, Responsible, Safe) schools programme aims to inspire young Londoners to think differently about travel and its impact on their health, wellbeing and the environment. Now in its 12th year, accreditation to STARS has grown from 180 schools in 2007 to 1,465 in 2018. Schools are judged on their success in changing travel behaviour with each school awarded either a Bronze, Silver or Gold accreditation. This year 686 schools attained Gold – the highest ever number. Participating schools have achieved an average eight per cent reduction in car use on the journey to school [65].

### 7.20.2 Children’s Traffic Club

Designed for three-year-olds, the Children’s Traffic Club is a free resource that teaches youngsters to ‘stop, look and listen’, play safely and to cross the road. It also covers the benefits of active travel. We currently reach more than 85 per cent of London’s three-year-olds, up-weighted to reach children from a BAME background as they are proportionately more likely to be involved in a road incident [64].

In 2015, 'Children's Traffic Club (CTC) London' was launched as a bespoke multi-media resource, which included printed and online resources as well as a supporting mobile app. In 2016, we carried out research with parents/carers and nursery leaders, and while nearly all parents/carers (92 per cent) had used the printed material, use of the digital resource was much lower with just 36 per cent using the website and 18 per cent using the app. Parents/carers and nursery leaders were typically satisfied with the resources, finding them useful as well as fun and engaging for the children [66].

Parents/carers tended to feel that CTC London had a positive influence on road safety and active travel behaviour. Sixty per cent agreed that the resources had made them change their behaviour towards road safety and active travel when out with their child. Furthermore, a similar proportion (64 per cent) felt that they had noticed changes in their child's behaviour towards road safety and active travel [66].

### **7.20.3 Safety and Citizenship**

Safety and Citizenship is a programme aimed at 11-year-olds as they transition from Primary to Secondary school and start to travel independently. Delivered either in-school or as part of joint event with the Metropolitan Police Service, councils and the fire service, the programme focuses on journey planning, considerate behaviour, road safety and active travel. The programme is currently delivered to more than 78 per cent of all London's primary schools [64].

### **7.20.4 Youth Travel Ambassadors**

Youth Travel Ambassadors is a peer-to-peer programme for secondary schools, providing 11-19s with the skills and confidence to address the transport issues affecting their school community. Around 110 schools participate and introduce behaviour change initiatives each academic year including 10 per cent Special Educational Needs (SEN) schools [64].

## **7.21 Customer satisfaction**

### **7.21.1 Overall satisfaction**

We measure overall satisfaction with various transport types in London on an 11-point scale, with 10 representing extremely satisfied and zero representing extremely dissatisfied. We then scale this up to 100).

We have standardised satisfaction ratings which we have laid out in the following table. This allows us to apply consistent analysis across a wide range of satisfaction research.

Average rating	Level of satisfaction
Under 50	Very low/weak/poor
50-54	Low/weak/poor
55-64	Fairly/relatively/quite low/weak/poor
65-69	Fair/reasonable
70-79	Fairly/relatively/quite good
80-84	Good or fairly high
85-90	Very good or high
90+	Excellent or very high

We do not collect customer satisfaction data from people aged under 16. Satisfaction levels of younger people remains very similar to those of all Londoners.

## Overall satisfaction with transport types (2016/17) [15]

Satisfaction score (0-100)	All	16-24	16-19	20-24
<b>Bus services</b>				
Base	(13,032)	(2,412)	(1,301)	(1,111)
Satisfaction score	86	85	84	85
<b>Night bus</b>				
Base	(769)	(203)	(41*)	(162)
Satisfaction score	85	84	-	83
<b>TfL Rail</b>				
Base	(4,955)	(1,120)	(361)	(759)
Satisfaction score	83	84	84	84
<b>Underground</b>				
Base	(16,947)	(3,154)	(820)	(2,334)
Satisfaction score	85	86	87	86
<b>Overground</b>				
Base	(13,209)	(2,861)	(721)	(2,140)
Satisfaction score	84	85	85	85
<b>DLR</b>				
Base	(12,243)	(2,749)	(672)	(2,077)
Satisfaction score	89	89	89	89
<b>London River Services</b>				
Base	(1,040)	(84)	(19*)	(65)
Satisfaction score	90	90	-	89
<b>Trams</b>				
Base	(3,841)	(592)	(326)	(266)
Satisfaction score	90	88	87	90
<b>Victoria Coach Station</b>				
Base	(1,312)	(517)	(164)	(353)
Satisfaction score	81	83	86	81
<b>TLRN</b>				
Base	(9,592)	(836)	(271)	(565)
Satisfaction score	69	70	69	70

\*Denotes small base size (percentages not shown in this report for base sizes of less than 50).

Satisfaction is not shown for Dial-a-Ride, black cabs and minicabs owing to small base sizes.

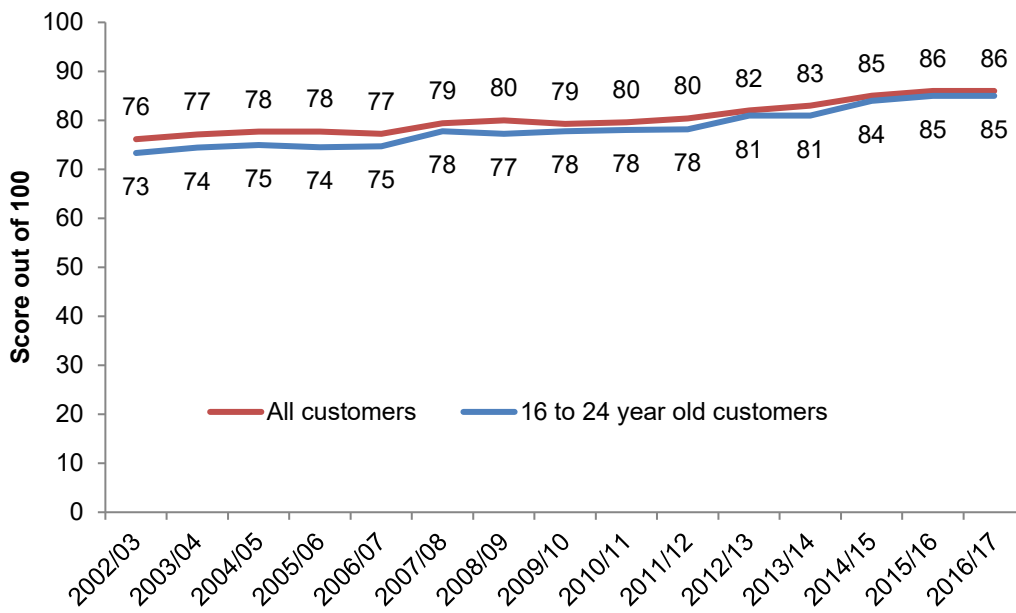
### 7.21.2 Bus

Satisfaction among bus users is high at 86 out of 100. Satisfaction among younger customers aged 16-24 is in line with customers overall (85 out of 100 among 16 to 24-year-olds compared with 86 out of 100 of all customers) [15].

Satisfaction levels for individual elements of bus services are also very similar among younger customers and among customers overall, with no more than one point difference in satisfaction scores for each aspect [15].

Overall satisfaction with buses has increased over time for younger customers – from 73 out of 100 in 2002/03 to 85 in 2016/17. This is in line with trends seen among all customers [15].

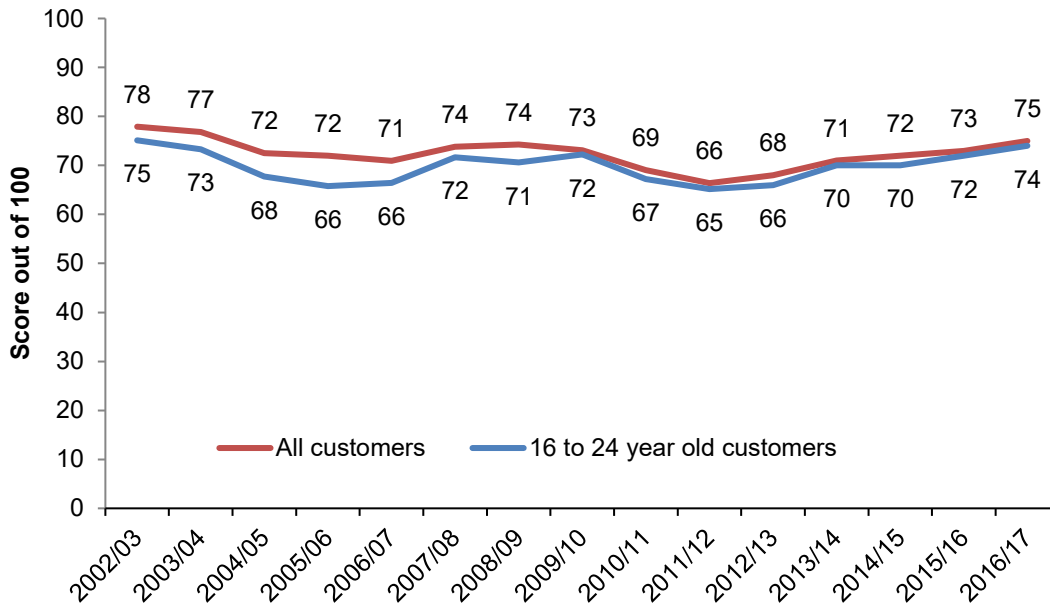
#### Overall satisfaction with buses over time [15]





Younger customers' satisfaction with the value for money of bus services is also in line with the average for all customers (74 out of 100 among 16 to 24-year-olds compared with 75 out of 100 all customers) [15].

### Satisfaction with value for money with buses over time [15]



### Drivers of satisfaction

Ease of making journeys, journey time and smoothness or freedom from jolting are important factors for younger people in terms of bus customer satisfaction scores. Satisfaction among 16 to 19-year-olds is also driven by comfort inside the bus, while for slightly older customers (20 to 24-year-olds), interior information remains a driver of satisfaction [15].

### Drivers of satisfaction for bus users [15]

All customers	16-19	20-24
Journey time	Journey time	Ease of making journey
Ease of making journey	Comfort inside the bus	Journey time
Time waited to catch bus	Ease of making journey	Smoothness and freedom from jolting
Comfort inside the bus	Smoothness and freedom from jolting	Safety and security
Driver approachability and helpfulness	Safety and security at stops and shelters	Interior condition

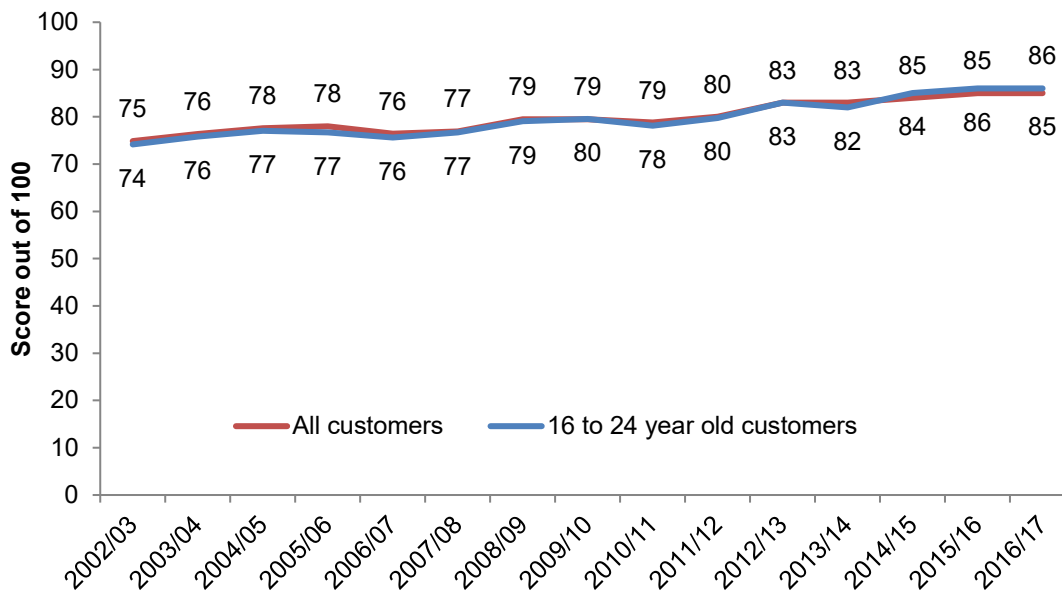
### 7.21.3 Tube

Satisfaction with the Tube among younger customers (16 to 24-year-olds) is almost identical as for all customers, (86 out of 100 compared with 85 out of 100 all customers) [15].

Satisfaction with safety and security in the station scores highly for both young people and all customers at 87 out of 100 and 86 out of 100 respectively. Safety on the train also scores highly (88 out of 100 for young people and 87 out of 100 for all customers) [15].

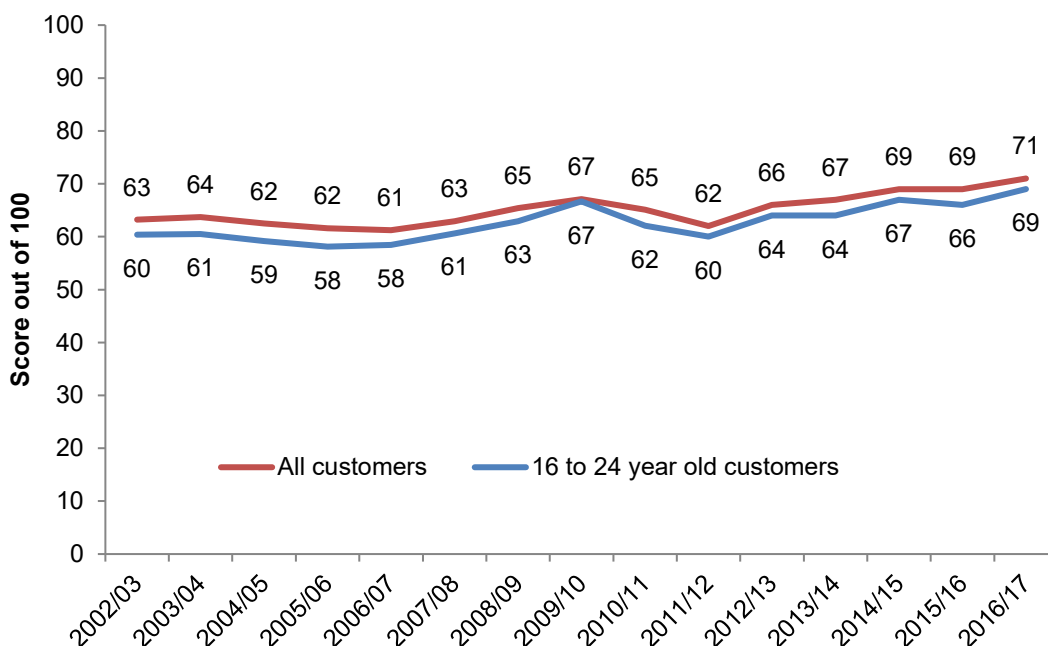
Overall, satisfaction with the Tube has risen considerably among younger customers and all customers in recent years. Among 16 to 24-year-olds, satisfaction has risen from 74 out of 100 in 2002/03 to 86 out of 100 in 2016/17 [15].

#### Overall satisfaction with the Tube over time [15]



Satisfaction with value for money of the Tube is lower than overall satisfaction. Customers aged 16-24 give the Tube a score of 69 out of 100, which is slightly lower than the score given by all customers of 71 out of 100. This has risen steadily since 2011/12 among 16 to 24-year-olds as well as all customers after decreasing for two years running [15].

### Satisfaction with value for money with the Tube over time [15]



### Drivers of satisfaction

Customer satisfaction drivers among younger Tube users are largely similar to those for all Tube customers: ease of making journeys, comfort and length of journey are the three main drivers. Additionally, younger customers' satisfaction is driven by personal safety on board [15].

### Drivers of satisfaction for Tube users [15]

All customers	16-19	20-24
Ease of making journey	Personal safety on train	Comfort of journey
Comfort of journey	Ease of making journey	Ease of making journey
Length of journey time	Comfort of journey	Length of journey time
Length of time waiting for train	Length of journey time	Personal safety on train
Train crowding	Smoothness of journey	Train crowding

## 7.21.4 Overground

Overall satisfaction with the Overground is high among younger customers at 85 out of 100, similar to the score given by all customers (84 out of 100) [15].

### Overall satisfaction with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	16-24	16-19	20-24
<b>Base 2016/17</b>	<b>(13,209)</b>	<b>(2,861)</b>	<b>(721)</b>	<b>(2,140)</b>
2009/10	73	74	76	73
2010/11	80	79	79	80
2011/12	82	81	80	81
2012/13	82	82	80	82
2013/14	82	81	80	81
2014/15	83	83	84	83
2015/16	84	84	84	84
2016/17	84	85	85	85

As seen in our research results for the Tube and buses, value for money satisfaction scores for the Overground are lower than the overall satisfaction score. Both younger customers rate overall satisfaction with value for money with the Overground at 73 out of 100 - the same score as all customers (73 out of 100). Overall, people's perception of value for money has remained largely consistent over time, whereas 16 to 19-year-olds' satisfaction has risen by 11 points from 67 in 2011/12 to 78 out of 100 in 2016/17 [15].

### Satisfaction with value for money with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	16-24	16-19	20-24
<b>Base 2016/17</b>	<b>(12,491)</b>	<b>(2,750)</b>	<b>(713)</b>	<b>(2,037)</b>
2011/12	72	70	67	70
2012/13	71	70	68	70
2013/14	70	68	71	67
2014/15	73	72	77	71
2015/16	73	71	75	71
2016/17	73	73	78	72

## Drivers of satisfaction

The provision of information appears to be a main driver of satisfaction for younger Overground customers (particularly those aged 16-19), more so than for Overground customers as a whole. Comfort is also important for younger customers, both inside trains and while waiting for them [15].

### Drivers of satisfaction for Overground users [15]

All customers	Aged 16-19	Aged 20-24
Ease of making journey	General information about train times and routes at the station	Condition and state of repair of the train
Feel valued as a customer	Comfort of the train	Ease of making journey
Train running on time	Information or assistance met needs	Comfort while waiting for the train
Information about service disruption on the train	Comfort while waiting for the train	Feel valued as a customer
Comfort of the train	Information about service disruption on the train	Information about service disruptions at the station

### 7.21.5 Docklands Light Railway (DLR)

Overall satisfaction with the DLR is rated 'high' among younger customers at 89 out of 100. This is the same as the average given by all customers (89 out of 100). These satisfaction levels have remained largely constant over the past three years [15].

### Overall satisfaction with DLR over time – all customers [15]

Satisfaction score (0-100)	All	16-24	16-19	20-24
<b>Base 2016/17</b>	<b>(12,243)</b>	<b>(2,749)</b>	<b>(672)</b>	<b>(2,077)</b>
2009/10	81	80	79	80
2010/11	81	81	78	82
2011/12	82	82	82	82
2012/13	87	87	86	87
2013/14	87	87	86	87
2014/15	89	88	88	88
2015/16	89	89	88	89
2016/17	89	89	89	89

Value for money satisfaction with the DLR among younger customers remains in line with customers overall (80 out of 100 for 16 to 24-year-old customers and 79 out of 100 for all customers). Satisfaction with value for money among younger customers and all customers has increased by three points since 2014/15 [15].

## Satisfaction with value for money with DLR over time – all customers [15]

Satisfaction score (0-100)	All	16-24	16-19	20-24
<b>Base 2016/17</b>	<b>(11,554)</b>	<b>(2,620)</b>	<b>(650)</b>	<b>(1,970)</b>
2011/12	72	70	71	70
2012/13	74	71	72	71
2013/14	75	73	75	72
2014/15	77	77	79	76
2015/16	78	77	79	76
2016/17	79	80	81	79

### Drivers of satisfaction

The key drivers of satisfaction for the DLR continue to be very similar for young people (16-24) and DLR customers, namely ease of making journeys, comfort, reliability of the service and length of the journey time. Personal safety while travelling is a more important aspect for younger customers [15].

### Drivers of satisfaction for DLR users [15]

All customers	16-24
Ease of making journey	Ease of making journey
Comfort of the train	Comfort of the train
Reliability of trains	Length of journey time
Length of journey time	Personal safety during journey
Ease of getting on the train	Reliability of trains

### 7.21.6 Trams

Overall satisfaction with London's trams is high among customers at 90 out of 100. This is slightly higher than among younger users (88 out of 100), although it rises to 90 out of 100 among 20 to 24-year-old customers [15].

### Overall satisfaction with trams over time – all customers [15]

Satisfaction score (0-100)	All	16-24	16-19	20-24
<b>Base 2016/17</b>	<b>(3,841)</b>	<b>(592)</b>	<b>(326)</b>	<b>(266)</b>
2009/10	86	83	83	84
2010/11	85	80	79	81
2011/12	86	81	81	80
2012/13	89	86	85	88
2013/14	89	86	85	88
2014/15	89	88	88	88
2015/16	90	89	89	89
2016/17	90	88	87	90

Overall satisfaction with value for money on tram services is fairly high (82 out of 100 for all customers and 83 out of 100 for 16 to 24-year-olds) and is considerably higher compared to scores in 2011/12. Those in their teens are generally more satisfied with value for money of trams than those in their early twenties (86 out of 100 against 79 out of 100 respectively) [15].

**Satisfaction with value for money with trams over time – all customers [15]**

Satisfaction score (0-100)	All	16-24	16-19	20-24
<b>Base 2016/17</b>	<b>(2,415)</b>	<b>(561)</b>	<b>(307)</b>	<b>(254)</b>
2011/12	73	75	81	66
2012/13	78	77	82	70
2013/14	78	79	86	72
2014/15	78	81	86	75
2015/16	79	81	85	76
2016/17	82	83	86	79

**7.21.7 Streets**

When asked about their perceptions of London’s streets and pavements on their latest walking journey in London, younger Londoners gave a marginally higher satisfaction rating compared with all Londoners. Those aged 16-24 gave a rating of 73 out of 100, compared with 69 out of 100 for all Londoners. However, the difference between these data points is not statistically significant owing to the limited sample size of younger Londoners in the survey [33].

**Overall satisfaction with streets and pavement after last journey over time – walking journey [33]**

Satisfaction score (0-100)	All	16-24
<b>Base 2018</b>	<b>(951)</b>	<b>(59)</b>
2017	69	72
2018	69	73

There is insufficient sample to detail satisfaction results with car journey and cycling.

**7.21.8 Transport for London Road Network (TLRN)**

Satisfaction with the TLRN is reasonable to fairly good. Younger users of the TLRN give a score of 68 out of 100 for walking, 71 out of 100 for travelling by bus on red routes and, 73 out of 100 for driving and 69 out of 100 for cycling. Results are largely similar for younger and all Londoners, although younger Londoners are marginally more satisfied than all Londoners for car and cycle journeys [15].

## Overall satisfaction – general impression of red routes over time 2016/17 [15]

Satisfaction score (0-100)	All	16-24
<b>Walking</b>		
Base 2016/17	(3,432)	(376)
2013/14	70	72
2014/15	68	70
2015/16	68	66
2016/17	68	68
<b>Travelling by bus</b>		
Base 2016/17	(1,375)	(113)
2013/14	69	*
2014/15	71	72
2015/16	71	68
2016/17	72	71
<b>Driving</b>		
Base 2016/17	(2,286)	(96)
2013/14	67	*
2014/15	67	67
2015/16	70	72
2016/17	69	73
<b>Cycling</b>		
Base 2016/17	(1,048)	(108)
2013/14	69	*
2014/15	70	72
2015/16	65	67
2016/17	66	69

\*Denotes small base size (data is not shown in this report for base sizes of less than 50).

## 7.22 Access to information

### 7.22.1 Access to the internet

Younger online Londoners aged 16-24 are significantly more likely than all online Londoners to access the internet on the move or at work: ninety-two per cent use it on the move and 74 per cent at work. This compares with 81 per cent and 66 per cent of all online Londoners [14].



### Internet access (autumn 2017/spring 2018) [14]

%	All	16-24
<b>Base (online Londoners)</b>	<b>(2,062)</b>	<b>(241)</b>
Access at home	100	100
Access 'on the move'	81	92
Access at work	66	74

The reasons why younger online Londoners use the internet are broadly similar to all online Londoners, but there are some notable differences. The largest difference in terms of internet use is for:

- Education-related tasks (79 per cent of 16 to 24-year-olds compared with 55 per cent of all Londoners, a 24-point difference)
- Playing games (75 per cent compared with 58 per cent)
- Social media and networking (93 per cent compared with 79 per cent)
- Sharing photos (80 per cent compared with 67 per cent)
- Watching video content (93 per cent compared with 80 per cent) [14]

Conversely, younger online Londoners are much less likely compared to all online Londoners to use the internet for contacting companies for customer service (54 per cent of those aged 16-24, compared with 66 per cent overall) [14].

### Reasons for using the internet (autumn 2017/spring 2018) [14]

%	All	16-24
<b>Base</b>	<b>(2,062)</b>	<b>(241)</b>
Email	96	96
Social media and networking	79	93
Watching video content	80	93
Maps and directions	90	90
Buying goods/services	90	87
Finding information	91	86
Accessing live public transport information	82	84
Banking	82	81
Sharing photos	67	80
Education related	55	79
Playing games	58	75
Making day-to-day travel plans	71	71
Work-related	58	58
Contacting companies for customer service	66	54

As respondents could select more than one answer, totals may equal more than 100 per cent.

### 7.22.2 Device usage and behaviour

Ninety-six per cent of 16 to 24-year-olds use a smartphone, which is a significantly higher proportion than Londoners overall (84 per cent) [14].

**Proportion of Londoners who use a smartphone (iPhone, BlackBerry, other) (autumn 2017/spring 2018) [14]**

%	Base	Smartphone ownership
All Londoners	(2,062)	84
16 to 24-year-old Londoners	(241)	96

Among those with a smartphone, 61 per cent of online Londoners aged 16-24 use an iPhone and 46 per cent use an Android phone [14].

A key reason that those from younger age groups use these devices is to stay connected to their friends. Thirty-eight per cent of eight to 17-year-olds use devices 'so they know what others are doing,' and 30 per cent use sites for 'fear of missing out.' [67]

**7.22.3 Using the TfL website**

Younger Londoners (aged 16-24) are just as likely as all Londoners to use the TfL website, with 88 per cent compared with 89 per cent of all Londoners [14].

However, younger users of the TfL website are more likely to visit the site more frequently than all users. Among the 16-24 age group, 33 per cent visit tfl.gov.uk every day compared with 27 per cent of all users [14].

**Proportion of Londoners who use tfl.gov.uk (autumn 2017/spring 2018) [14]**

%	All	16-24
<b>Base</b>	<b>(2,062)</b>	<b>(241)</b>
Uses TfL website	89	88
Daily	27	33
3-4 times a week	17	22
3-4 times a month	20	13
Once a month	11	8
Less than once a month	14	12
Never	11	12

The most common use of the TfL website for online Londoners aged 16-24 is for journey planning (68 per cent), although this is significantly lower than the proportion of all online Londoners (76 per cent). Younger online Londoners are also considerably less likely than online Londoners overall to use the website for viewing maps (21 per cent compared with 29 per cent) or for obtaining information about roads (five per cent compared with 12 per cent) [14].

### Reasons for visiting the TfL website (autumn 2017/spring 2018) [14]

%	All	16-24
<b>Base (online Londoners)</b>	<b>(2,062)</b>	<b>(241)</b>
Journey planning	76	68
Ticketing (information and buying)	30	28
Viewing maps	29	21
Budgeting	19	18
Information about roads	12	5
Information about cycling	4	2

As respondents could select more than one answer, totals may equal more than 100 per cent.

#### 7.22.4 Accessing information in the event of travel disruption

A very similar proportion of younger online Londoners and online Londoners overall seek real-time travel information when they encounter problems or delays while travelling (95 per cent compared with 96 per cent). They also look for similar information sources as all Londoners but more often.

The most commonly used source of travel information by 16 to 24-year-olds is announcements or displays (used by 52 per cent compared with 59 per cent of all Londoners), along with the TfL website, which is used by 35 per cent of 16 to 24-year-olds and 43 per cent of all online Londoners, apps are used by 32 per cent of 16 to 24-year-old online Londoners and by 28 per cent of all online Londoners.

Speaking to staff is far less common among younger online Londoners than all online Londoners (21 per cent compared with 41 per cent) [14].

## 8 Disabled people

### Key findings

- Fourteen per cent of Londoners consider themselves to have a disability that impacts their day to day activities ‘a lot’ or ‘a little’ [2]
- Eighty-four per cent of disabled Londoners report that their disability limits their ability to travel [11]
- Disabled Londoners are less likely to agree that ‘TfL cares about its customers’ than non-disabled customers (44 per cent compared to 48 per cent) [90]
- Disabled Londoners travel less often than non-disabled Londoners (1.9 compared with 2.5 trips on an average weekday) [11]
- The most commonly used types of transport by disabled Londoners are walking (81 per cent of disabled Londoners walk at least once a week), the bus (58 per cent) and car as the passenger (42 per cent) [11]
- The main barriers that disabled Londoners experience and which have an impact upon their ability to make public transport journeys as often as they would like are often the same as those expressed by non-disabled Londoners, namely overcrowding and concerns about the antisocial behaviour of other customers. Disabled customers also see accessibility-related issues, cost and comfort as barriers to travel [[14], [65]]
- Freedom Passes are the most common ticket type used on TfL services by disabled Londoners (66 per cent). Twenty-seven per cent of disabled Londoners use Oyster pay as you go, a considerably smaller figure than non-disabled Londoners where the ticket is used by 61 per cent [30]
- Disabled online Londoners are significantly less likely to access the internet in certain places compared to non-disabled online Londoners. Forty-seven per cent of disabled online Londoners access the internet on the move significantly lower than the 71 per cent of non-disabled online Londoners. Similarly, a considerably lower proportion of disabled online Londoners access the internet while on a journey compared with non-disabled online Londoners (70 per cent and 83 per cent respectively)
- Disabled Londoners are less likely to own a smartphone than non-disabled Londoners (73 per cent compared with 87 per cent) – although the gap has narrowed over time [14]

Note: Throughout this report, data relating to disabled people are based on survey and Census results where respondents have self-defined based on standard questions.

## 8.1 Summary – Disabled People

### 8.1.1 Profile of disabled Londoners

There are several sources which aim to quantify the number of disabled people in London. The primary benchmark source is the 2011 Census, conducted by the ONS. According to the Census, 14 per cent of Londoners consider themselves to have a long-term health problem or disability that limits their day-to-day activities ‘a lot’ or ‘a little’, which has lasted, or is expected to last at least 12 months [2].

We also continuously measure the number of disabled people in London as part of the LTDS. This survey uses slightly different questions (owing to the different purpose of the research). Data from 2016/17 shows that eight per cent of Londoners consider that they have a long-term physical or mental disability or health issue that limits their daily activities, the work they can do and their ability to travel (this includes issues experienced by older customers) [11].

Fifty-five per cent of disabled Londoners state that their disability affects their mobility, 22 per cent have a serious long-term illness and 10 per cent have a mental health condition [11]. It is important to recognise, however, that many disabled people experience multiple impairments.

The profile of disabled Londoners identified in the LTDS varies from that of non-disabled people and Londoners overall.

- Fifty-six per cent of disabled Londoners are women, compared to 50 per cent of non-disabled Londoners
- Forty-four per cent of disabled Londoners are aged 65 or over compared to nine per cent of non-disabled Londoners. This older age profile of disabled Londoners has an influence upon many findings in this report
- Sixty-seven per cent of disabled Londoners are white, compared to 61 per cent of non-disabled Londoners
- Seventy-seven per cent of disabled Londoners are retired or not working compared with 20 per cent of non-disabled Londoners
- Thirty-four per cent of disabled Londoners have household income of less than £10,000 compared with 10 per cent of non-disabled Londoners [11]

### 8.1.2 Transport behaviour

Disabled Londoners travel less frequently than non-disabled Londoners (1.9 journeys per weekday compared with 2.5 for non-disabled Londoners). While the main transport types used by disabled Londoners are the same as those used by non-disabled Londoners (namely walking, bus, and car both as a driver and a passenger), lower or equal proportions of disabled people use each type of transport at least once a week than non-disabled Londoners (with the exception of private hire vehicles of black cabs, where disabled Londoners are slightly more likely to use them than non-disabled Londoners) [11].

- Disabled Londoners are more likely to walk (81 per cent) and use buses (58 per cent) at least once a week than other types of transport [11]
- Lower proportions of disabled Londoners travel by Tube (21 per cent) and National Rail (nine per cent). The proportion is considerably lower than for non-disabled Londoners (43 per cent and 17 per cent respectively) [11]
- Members of Dial-a-Ride tend to be older than disabled Londoners generally – 82 per cent of Dial-a-Ride members are aged 65 and over, compared to 41 per cent of all disabled Londoners [30, AB]

Disabled Londoners are more likely to hold an older person's Freedom Pass (45 per cent compared with 12 per cent of non-disabled Londoners) and less likely than non-disabled Londoners to hold an Oyster card (26 per cent compared with 63 per cent of non-disabled Londoners). Sixteen per cent of disabled people hold a disabled person's Freedom Pass [11].

### 8.1.3 Barriers

We conducted a survey in 2014 to further understand some of the key issues faced by disabled people travelling on the network. The results show that most disabled Londoners (61 per cent) would travel more often than they currently do if they did not experience barriers such as accessibility or cost constraints [55].

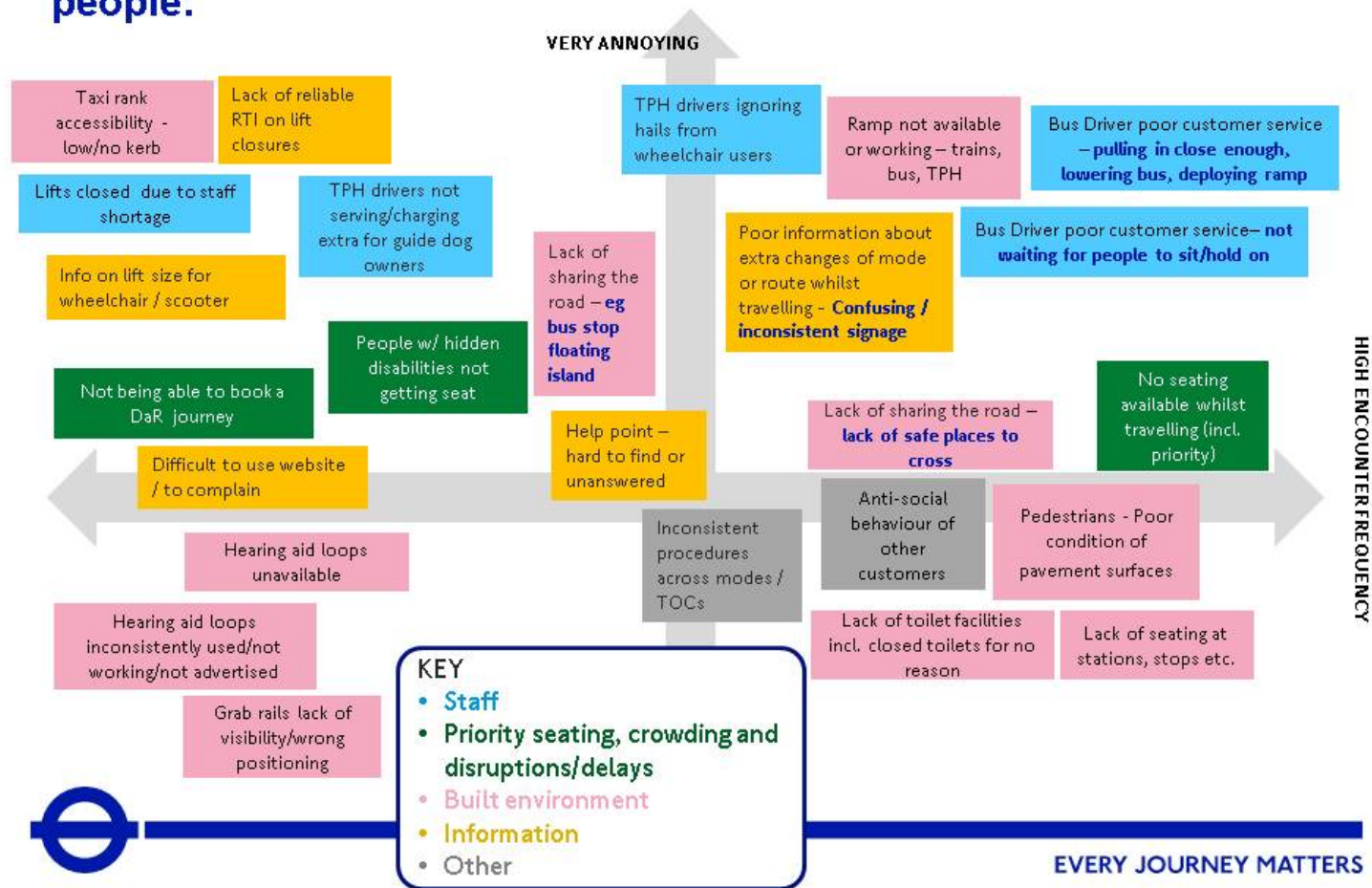
Additional journeys that would be made more often without these barriers would be for leisure and social activities, such as visiting friends and family (49 per cent), entertainment and exercise (41 per cent), social activities such as going to the pub or to a restaurant (40 per cent) and shopping (34 per cent) [55].

The barriers to greater public transport use that are most commonly mentioned by disabled Londoners are:

- Overcrowding and cramped conditions (51 per cent compared with 47 per cent non-disabled customers)
- Cost (36 per cent compared with 43 per cent non-disabled customers)
- Passengers pushing and shoving each other (33 per cent compared with 24 per cent non-disabled customers) [13]

As the image below shows, gain points and pain points are similar but more severe for disabled Londoners than for non-disabled customers.

**The 'all customer' gain points often have a more severe impact for disabled customers. There are also additional gain points for disabled people:**



Disabled and non-disabled Londoners alike recognise that we have made improvements to the accessibility of public transport and in September 2018 47 per cent of disabled people agreed that we are making it easier for disabled people to get around [55].

Disabled Londoners are significantly less likely than non-disabled Londoners to say that they are 'not at all worried' about personal security (ie being safe from crime or antisocial behaviour) while using public transport in London (17 per cent compared with 23 per cent) and are more likely to report that they are worried (either 'quite worried' or 'very worried'): 37 per cent of disabled Londoners say they are generally worried compared with 28 per cent of non-disabled Londoners.

#### **8.1.4 Customer satisfaction**

Our Customer Satisfaction Survey has measured overall satisfaction with various transport types in London for several years on an 11-point scale, with 10 representing extremely satisfied and zero representing extremely dissatisfied. In general, there has been a gradual upward trend for most transport modes.

- Disabled Londoners' satisfaction with public transport tends to be in line with the satisfaction of all Londoners. Disabled and non-disabled bus users are very satisfied overall (both giving a mean rating of 86 out of 100) [15]
- Tube satisfaction is also high among disabled users (84 out of 100 compared with 85 out of 100 for non-disabled Londoners) [15]
- Satisfaction with value for money continues to be often higher among disabled Londoners than non-disabled Londoners [15]. This may be linked to the higher proportion of disabled Londoners having access to a Freedom Pass [11]
- Disabled Londoners are slightly more satisfied with the streets and pavements on their last walking journey compared with non-disabled Londoners (71 out of 100 compared with 69 out of 100) and on their most recent car journey (65 out of 100 compared with 62 out of 100) [33]

#### **8.1.5 Access to information**

A significantly lower proportion of disabled Londoners access the internet compared with non-disabled Londoners (76 per cent compared with 93 per cent). This is true for all age groups, although not to the same extent. Older disabled Londoners are considerably less likely to access the internet than younger disabled Londoners (53 per cent of disabled Londoners aged 65 years old or over access the internet compared with 90 per cent of disabled Londoners aged 16 to 64) [15a].

Among all disabled online Londoners, 84 per cent have ever used the TfL website. This compares to 90 per cent of non-disabled online Londoners [14].



Disabled customers use maps and timetables widely, referring to them both at home and on the journey, and using the 'disabled sign' as a quick reference to confirm whether or not the station will be accessible [56]. Our research indicates that disabled customers have a higher reliance on paper-based sources than non-disabled customers. However, this may be owing to their older profile [45] and the fact that many apps are not accessible for some disabled people.

Disabled customers have similar concerns about disruptions as non-disabled customers; however, disruptions can have a greater impact upon disabled customers because they can face greater difficulties overcoming the effects. Disabled customers report that they can experience anxiety during disruptions and that access to reliable, real-time information is crucial to minimise this and allow people to change their journeys [56].

## **8.2 Introduction**

Many disabled people and those with long-term health conditions face a number of 'gain points' when travelling in London. While many issues are the same for disabled and non-disabled Londoners, some barriers relate specifically to the physical infrastructure of public transport, as well as less tangible issues such as reduced confidence in travelling independently [44].

The recently published Mayor's Transport Strategy (MTS) 2018 sets out the Mayor's transport vision over the next 20 years and describes how, along with our partners, we will deliver this vision. We are committed to delivering transport services that are accessible to all Londoners and we continue to invest in improving transport accessibility for disabled people who live in, work in, or visit London. Furthermore, the Mayor's Diversity and Inclusion Strategy highlights the need for all Londoners to be able to get around the Capital, by building accessibility into all new transport infrastructure, and working to improve stations and stops.

To support the MTS, the TfL Business Plan for the next decade includes activities for infrastructure improvements to make information and advice clearer and simpler, enhancements to staff training, and further engagement with disabled customers [57]. A major part of this investment includes making a further 30 stations step-free (increasing from 71 stations to 101 stations) by March 2022, meaning that two-fifths of London's Tube stations will be fully accessible with step-free access to platforms and trains. Twenty-three of the stations have been announced so far [57].

The Mayor has also committed to making London a Dementia Friendly City by 2020 and we are working with our partners to shape a transport network that is also inclusive for people with a range of neuro diverse conditions such as autism, dyspraxia and attention deficit hyperactivity disorder. This will help people with these conditions to use the network safely, easily and with dignity [58].

We have created a transport-focused e-learning module so more staff can become Dementia Friends, and we now have more than 200 Dementia Friends in bus garages across London. We will continue to work closely with the Alzheimer's

Society to raise awareness and improve our services for people living with dementia [58].

Throughout this chapter, we show data for disabled Londoners in comparison to data for non-disabled Londoners and all Londoners. All TfL surveys use the Equality Act 2010 to define a disabled person as someone who defines themselves as having a long-term physical or mental disability or health issue that impacts on their daily activities, the work they can do, or limits their ability to travel. This differs slightly to the Census, where the question asked is: 'Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?' [2].

The differences highlighted between disabled and non-disabled people may be influenced by a number of factors other than disability, with age, income and education all affecting perceptions towards travel in London and travel behaviour.

It is also important to be aware that disability is not standardised and the effects of having a physical impairment, mental health condition or experiencing other barriers relating to the use of public transport are therefore diverse.

### **8.2.1 Accessibility Insight Package**

We are committed to ensuring that London continues to have one of the most accessible transport networks in the world. As part of our work to understand the needs and opinions of disabled customers, we conduct a range of research programmes and analyse a number of different data sources, including:

- An online community of more than 300 disabled passengers (My London Journeys) which provides feedback on completed journeys
- Data on complaints and commendations made about our services (by those with accessibility needs)
- A continuing tracking survey covering Londoners' perceptions of TfL and the services we operate
- Ad-hoc research on the customer experience of a specific theme or element on our network, for example priority seating and our 'Please offer me a seat' badge

Within our Accessibility Insight Package (AIP), we combine these various data sources so we can monitor and gain a deeper understanding of disabled people's whole journey experience. This enables us to plan, take action and ultimately improve accessibility around the key areas of staff performance, built and urban environment, congestion crowding and seating, and information provision.

In July 2018, our AIP report found that overall the London transport network is moderately accessible, with areas of excellent provision but also some of significant frustration for travellers with accessibility issues.

The theme running throughout the insights presented in the AIP report is that small additional improvements will go a considerable distance to improving overall accessibility. These include: greater attentiveness from drivers or staff in stations; improving accessibility information, particularly for when things go

wrong; encouraging greater consideration among fellow customers; or ensuring station facilities are operational.

Specific insights from the AIP are included throughout this chapter [59].

### **8.3 Profile of disabled Londoners**

There are several sources that aim to quantify the number of disabled people in London. The primary benchmark source is the 2011 Census, conducted by the ONS. According to the Census, 14 per cent of Londoners consider themselves to have a long-term health problem or disability that limits their day-to-day activities, which has lasted, or is expected to last, at least 12 months (seven per cent consider this affects their activity 'a lot' and seven per cent 'a little'). This is the lowest proportion recorded for any region of the UK, possibly due to the lower average age of Londoners compared to those living in other regions [2].

We also monitor the number of disabled people in London on an continuous basis as part of our LTDS. This survey uses a slightly different set of questions (owing to the different purpose of the research). Data from 2016/17 shows that nine per cent of Londoners (around 740,000 people excluding those aged under five) consider that they have a long-term physical or mental disability or health issue that limits their daily activities, the work they can do (including issues due to old age) or their ability to travel [11].

Slightly less than two per cent of Londoners (17 per cent of disabled Londoners) are wheelchair users (around 130,000 people excluding those aged under five years old) [11].

Many disabled people have multiple impairments. The most frequently reported impairments faced by disabled Londoners are related to mobility (55 per cent) [11].

## LTDS profile of disabled people in London (2016/17) [11]

%	All Londoners	All disabled Londoners
<b>Base</b>	<b>(17,560)</b>	<b>(1,729)</b>
Disabled	9	-
Non-disabled	91	-
Disability affects travel	8	84
Ever use a wheelchair	2	17
Mobility impairment	5	55
Serious long-term illness	2	22
Mental health condition	1	10
Visual impairment	1	7
Hearing impairment	0	4
Learning disability	1	7
Other	1	6

LTDS data in this report excludes children aged under five.

The table above refers to the impairments experienced by Londoners who consider themselves to have a long-term physical or mental disability or health issue that limits their daily activities, the work they can do (including issues due to old age) or their ability to travel. It is important to consider that there may be more people with these impairments that do not consider them to affect their activities. We support the social model of disability and we understand that we need to focus more on identifying and reducing the barriers that disabled people face than on their specific impairments.

The proportion of Londoners who are disabled increases with age. Five per cent of 16 to 24-year-olds are disabled compared with 44 per cent of Londoners aged 65 or over. Age is an important factor behind other demographic differences observed. For example, disabled Londoners are more likely to be women and less likely to be BAME Londoners. However, both trends appear to be related primarily to the age profile of disabled Londoners [11].

## LTDS demographic profile of disabled people in London (2016/17) [11]

%	Proportion of disabled Londoners	Proportion of category who are disabled	Proportion of non-disabled Londoners
<b>Base</b>	<b>(1,729)</b>	<b>(varies)</b>	<b>(15,831)</b>
<b>Gender</b>			
Men	44	8	50
Women	56	10	50
<b>Age</b>			
5-15	6	4	15
16-24	5	4	13
25-64	45	7	62
65+	44	32	9
<b>Ethnicity</b>			
White	67	10	61
BAME	32	8	37
<b>Household income</b>			
Less than £10,000	34	25	10
£10,000–£19,999	27	16	15
£20,000–£34,999	18	8	20
£35,000–£49,999	9	6	15
£50,000–£74,999	5	3	15
£75,000+	7	3	24
<b>Working status*</b>			
Working full-time	10	2	48
Working part-time	5	5	9
Student	3	4	7
Retired	47	33	9
Not working	30	23	11

\*LTDS data in this report excludes children aged under five and working status does not include under-16s.

All TfL surveys use the Equality Act 2010 to define disabled people as those who define themselves as having a long-term physical or mental disability or health issue that impacts on their daily activities, the work they can do, or limits their ability to travel.

### How to read the table

The table shows:

- The proportion of disabled Londoners who relate to each category – for example, 44 per cent of disabled Londoners are men
- The proportion of each category who are disabled – for example, eight per cent of men in London are disabled
- The proportion of non-disabled Londoners who relate to each category for comparison – for example, 50 per cent of non-disabled Londoners are men

## 8.4 Gender

Disabled Londoners are more likely to be women than men; among all disabled Londoners 56 per cent are women (compared to 50 per cent of the non-disabled population) [11].

### Gender profile of disabled people in London (2016/17) [11]

%	All disabled Londoners	All non-disabled Londoners
<b>Gender</b>	<b>(1,729)</b>	<b>(15,831)</b>
Men	44	50
Women	56	50

LTDS data in this report excludes children aged under five.

Men and women are equally likely to be disabled until they reach around 50 years of age, after which women are more likely to be disabled than men at all ages [2].

### Proportion of Londoners by age and gender who are disabled [2]

%	Men	Women
<b>Age</b>		
0-15	4	3
16-24	5	4
25-34	5	5
35-49	11	12
50-64	22	25
65-74	38	41
75-84	57	63
85+	78	83

This data is based on self-assessment of activity limitations.

Base size not shown as data taken from the 2011 Census.

## 8.5 Ethnicity

A higher proportion of disabled Londoners are white than non-disabled Londoners (67 per cent of disabled Londoners are white compared with 61 per cent of non-disabled Londoners) [11].

### Ethnicity profile of disabled Londoners (2016/17) [11]

%	All disabled Londoners	65+ disabled Londoners	All non-disabled Londoners	65+ non-disabled Londoners
<b>Base</b>	<b>(1,729)</b>	<b>(863)</b>	<b>(15,831)</b>	<b>(1,828)</b>
<b>Ethnicity</b>				
White	67	74	61	76
BAME	32	25	37	22

LTDS data in this report excludes children aged under five.

White Londoners are more likely than BAME Londoners to consider themselves to be disabled (10 per cent of white Londoners self-classify as disabled compared with eight per cent of BAME Londoners). This appears to be related to the older age profile of white Londoners, as the difference in each specific age category is not significant [11].

### Proportion of white and BAME Londoners who are disabled (2016/17) [11]

%	White	BAME
All Londoners	10	8
16-24	5	6
65+	49	35

Base: All white Londoners (11,173), white 16 to 24-year-old Londoners (1,049), white 65+ year old Londoners (2,004), all BAME Londoners (5,563), BAME 16 to 24-year-old Londoners (792), BAME 65+ year old Londoners (464).

LTDS data in this report excludes children aged under five.

## 8.6 Employment and income

Disabled Londoners are more likely to live in a household with an annual income of £20,000 or less than non-disabled Londoners (61 per cent compared with 25 per cent). This pattern continues to be observed across all ages.

The difference is particularly clear in the mid-age groups: 58 per cent of disabled Londoners aged 25 to 64 live in a low income household compared with 19 per cent of non-disabled Londoners of the same age. This is likely to be related to the considerably lower proportion of disabled 25 to 64-year-olds in full or part-time employment (26 per cent compared with 81 per cent among non-disabled 25 to 64-year-olds) [11].

### Proportion of each age group living in households with an income of less than £20,000 (2016/17) [11]

% Age	Disabled Londoners	Non-disabled Londoners
All	61	25
16-24	40	31
25-64	58	19
65+	67	48

LTDS data in this report excludes children aged under five.

### Proportion of each age group working full or part-time (2016/17) [11]

% Age	Disabled Londoners	Non-disabled Londoners
16-24	16	40
25-64	26	81
65+	3	17

Base: Disabled 16 to 24-year-old Londoners (72), disabled 25 to 64-year-old Londoners (717), disabled 65+year-old Londoners (863), non-disabled 16 to 24-year-old Londoners (1,898), non-disabled 25 to 64-year-old Londoners (9,715), non-disabled 65+year-old Londoners (1,828).

Working status data excludes under-16s.



## 8.7 London boroughs

### Highest proportion of disabled residents in London boroughs [2]

Borough	% of disabled residents
Havering	17
Barking and Dagenham	16
Bexley	16
Islington	16

Base size not shown as data taken from the ONS 2011 Census.

### Lowest proportion of disabled residents in London boroughs [2]

Borough	% of disabled residents
Wandsworth	11
Richmond upon Thames	11
City of London	11
Kensington and Chelsea	12
Kingston upon Thames	12
Merton	13

Base size not shown as data taken from ONS 2011 Census.

## 8.8 Travel behaviour

The London transport network is one of the busiest in the world and on an average weekday 1.1 million trips are made by disabled travellers [11], however the average number of trips made per weekday by individual disabled Londoners is 1.9; this is below the average of 2.5 for non-disabled Londoners [11].

## 8.9 Transport types used

Disabled Londoners use a wide variety of transport to get around the Capital. The most common are walking (81 per cent at least once a week), bus (58 per cent), car as a passenger (42 per cent) and car as a driver (24 per cent). These are also the main types of transport used by non-disabled Londoners but in different proportions [11].

Disabled Londoners are considerably less likely than non-disabled Londoners to use the Tube at least once a week: 21 per cent of disabled Londoners do so compared with 43 per cent of non-disabled Londoners [11].

Disabled Londoners use transport less frequently than non-disabled Londoners. For each type of transport (with the exception of private hire vehicles) a lower proportion of disabled Londoners use each type of transport at least once a week compared with non-disabled Londoners [11].

Public transport generally is less commonly used by disabled Londoners than non-disabled Londoners: 61 per cent have used any form of public transport (excluding walking) in the past year compared with 74 per cent of non-disabled Londoners [11].

**Proportion of Londoners using types of transport at least once a week (2016/17) [11]**

%	Disabled	Disabled 16-64	Disabled 65+	Non-disabled (All)	Non-disabled 65+
<b>Base</b>	<b>(1,729)</b>	<b>(789)</b>	<b>(863)</b>	<b>(15,831)</b>	<b>(1,828)</b>
Walking	81	88	70	96	95
Bus	58	64	48	60	72
Car (as a passenger)	42	40	41	45	41
Car (as a driver)	24	26	25	39	52
Tube	21	30	13	43	35
National Rail	9	12	5	17	15
Overground	7	10	3	12	8
Other taxi/minicab (private hire vehicle)	10	12	8	10	4
London taxi/black cab	3	3	3	2	2
DLR	3	5	2	5	1
Tram	2	3	1	2	2
Motorbike	-	1	-	1	1
Net: Any public transport (bus, Tube, National Rail, DLR, London Overground, tram)	61	69	52	74	78

LTDS data in this report excludes children aged under five.

Where more detailed information on individual types of transport is available, we have included a sub-section.

## 8.10 Walking

Walking is the most frequently used type of transport for both disabled and non-disabled Londoners. Only 12 per cent of disabled Londoners say that they have not made a journey by walking in the past year and three per cent say that they have never made a walking journey [11].

### Frequency of walking (2016/17) [11]

%	Disabled	Wheelchair user	Non-disabled
<b>Base</b>	<b>(1,729)</b>	<b>(313)</b>	<b>(15,831)</b>
5 or more days a week	56	23	86
3 or 4 days a week	11	7	5
2 days a week	8	8	3
1 day a week	7	6	2
At least once a fortnight	1	2	0
At least once a month	3	4	0
At least once a year	3	9	0
Not used in last 12 months	8	27	0
Never used	4	13	2
Net: Used in the last 12 months	88	60	98

LTDS data in this report excludes children aged under five.

Eighty-two per cent of disabled Londoners walk at least once a week compared with 96 per cent of non-disabled Londoners and 56 per cent walk five or more times a week compared with 86 per cent of non-disabled Londoners [11].

Our annual Attitude to Walking study establishes frequency of walking for specific journey purposes. There are particularly noticeable differences in walking behaviour between disabled and non-disabled Londoners:

- Forty-seven per cent of disabled Londoners walk at least once a week to visit social places such as pubs, restaurants or other social places compared with 62 per cent of non-disabled Londoners
- Forty-one per cent of disabled Londoners walk to get to work/school/college compared with 54 per cent of non-disabled Londoners [18]

## Walking at least once a week by purpose of journey (2018) [18]

% who walk at least once a week	Disabled	Non-disabled
<b>Base</b>	<b>(279)</b>	<b>(667)</b>
• To complete small errands such as getting a newspaper or posting a letter	75	80
• As part of a longer journey	59	73
• To visit friends and relatives	47	53
• To visit pubs/restaurants/cinemas and other social places	47	62
• To get to work/school/college	41	54
• To take a child to school	32	32

As respondents could select more than one answer, totals may equal more than 100 per cent.

Among disabled Londoners who state that their travel is limited by being disabled, 58 per cent consider it either impossible to walk without help (23 per cent) or difficult but not impossible to do so (35 per cent) [11].

## 8.11 Bus

Buses are the most commonly used type of public transport (except walking) by both disabled and non-disabled Londoners. However, disabled Londoners are less likely to use buses than non-disabled Londoners (82 per cent of disabled Londoners have used the bus in the past year compared with 91 per cent of non-disabled Londoners) [11].

### Frequency of travelling by bus (2016/17) [11]

%	Disabled	Wheelchair user	Non-disabled
<b>Base</b>	<b>(1,729)</b>	<b>(313)</b>	<b>(15,831)</b>
5 or more days a week	22	8	27
3 or 4 days a week	14	6	11
2 days a week	13	10	10
1 day a week	9	6	11
At least once a fortnight	5	6	7
At least once a month	7	6	10
At least once a year	12	14	14
Not used in last 12 months	13	31	5
Never used	5	13	4
Net: Used in the last 12 months	82	56	91

LTDS data in this report excludes children aged under five.

The physical accessibility of buses is one of the main reasons why they are one of the transport types most commonly used by disabled Londoners. All of TfL's buses, with the exception of heritage Routemasters, are low-floored and

wheelchair accessible and 95 per cent of bus stops are now wheelchair accessible [69]. Our research also suggests that, owing to the nature of the bus network and the shorter distances required to reach bus stops than train or Tube stations, more than 90 per cent of Londoners live within 400 metres of a bus stop [69].

Fifty-eight per cent of Londoners who report that their travel is limited because they are disabled consider it either impossible to use the bus without help (23 per cent) or difficult but not impossible to use the bus (35 per cent). Forty per cent say that it is not difficult to use the bus and one per cent don't know or never use it [11].

Wheelchair users experience greater difficulties, despite all buses being equipped with low flooring and wheelchair ramps. Fifty-three per cent of wheelchair users surveyed say that it is impossible to use the bus without help, and a further 34 per cent say that it is difficult but not impossible (up from 25 per cent in the last report). Nine per cent of wheelchair users use the bus without difficulties, while three per cent don't know or never use it [11]. It is clear from our research with disabled Londoners that the level of assistance provided makes a real impact to the customer journey:

'On boarding, my mobility scooter stopped as the ramp was too steep, the driver assisted me and I boarded safely.'

'Some other drivers would have ignored me. I was so grateful and he was really pleasant and welcoming.'

'Some drivers do seem to be uninterested in the passenger.'

'Drivers rarely pull-up near the curb or lower the bus when they can clearly see the passenger is disabled and elderly.'

'The driver pulled up slightly short of the bus stop so that the door was nearer to me. I have accessibility needs so this was very helpful. As well as not having to walk any further, I was also able to get on first and get a priority seat quickly and easily.' [59]:

### **Priority areas on buses**

More than half of the bus journeys made by our My London Journeys (MLJ) community were made by customers who did not think that others would be aware of their impairment, and more than half of bus journeys were made by customers using a 'Please offer me a seat badge'. However, it should be noted that 99 per cent of bus journeys reported by the community were made at off-peak times – priority seating and space on buses is likely to be a bigger problem at peak times, particularly for mobility impaired customers [59].

MLJ data shows that very few bus journeys (four per cent) made by accessibility impaired customers involve problems with priority seating, priority space or a lack of seating generally on board [59].

Similarly, data from the Mystery Traveller Survey shows that than one per cent of mystery travellers saw a wheelchair user board, and there were no instances of the wheelchair ramp not working. In nearly all situations the

wheelchair user was able to access the wheelchair priority area without the driver's intervention. In cases where customers didn't move, the bus driver played an announcement to make space.

'The driver was very patient. I was travelling to work at a busy time. He waited while passengers moved to allow me to access wheelchair space.' [60]

### Bus journey purpose

One of the reasons why disabled Londoners travel by bus during the day is to travel for work purposes (28 per cent). The proportion of disabled Londoners who do this is considerably lower than for non-disabled Londoners (57 per cent). Buses are used more by disabled people during the day for shopping (22 per cent compared with nine per cent for non-disabled people), to visit friends and relatives (13 per cent compared with eight per cent for non-disabled) and for personal business (14 per cent compared with six per cent for non-disabled). A similar pattern is seen at night, although the differences between disabled and non-disabled people at this time are smaller [27].

### Purpose of bus journey by disability and time of day (2014) [27]

	During the day		At night	
	Disabled (3,341)	Non-disabled (28,680)	Disabled (673)	Non-disabled (7,068)
%				
To/from or for work	28	57	37	53
To/from school/education	5	7	6	3
To/from shopping	22	9	3	1
Visiting friends/relatives	13	8	16	13
Leisure	10	10	20	22
Personal business	14	6	9	1
Other purpose	6	3	10	5

## 8.12 Car

While a considerably lower proportion of disabled Londoners have driven a car to get around London in the past year than non-disabled Londoners (28 per cent compared with 45 per cent), the proportion who have used a car as a passenger in the last year is the same for both groups (81 per cent) [11].

### Frequency of car use (2016/17) [11]

%	Car as driver			Car as passenger		
	Disabled	Wheel-chair user	Non-disabled	Disabled	Wheel-chair user	Non-disabled
<b>Base</b>	<b>(1,729)</b>	<b>(313)</b>	<b>(15,831)</b>	<b>(1,729)</b>	<b>(313)</b>	<b>(15,831)</b>
5 or more days a week	12	8	22	7	12	8
3 or 4 days a week	6	7	6	10	15	8
2 days a week	4	4	7	12	12	15
1 day a week	2	1	4	13	10	14
At least once a fortnight	1	-	1	7	7	7
At least once a month	1	-	2	13	12	11
At least once a year	3	3	3	20	19	19
Not used in last 12 months	14	20	5	9	6	6
Never used	58	58	50	10	7	13
Net: Used in the last 12 months	28	22	45	81	87	81

LTDS data in this report excludes children aged under five.

Disabled Londoners aged 17 and over are less likely to hold any type of driving licence (including a provisional licence) than non-disabled Londoners of the same ages (40 per cent compared with 68 per cent). A similar pattern is observed among both younger and older disabled Londoners when compared to non-disabled Londoners of the same ages [11].

Similarly, disabled Londoners are less likely to have household access to a car than non-disabled Londoners. Just over half (52 per cent) of disabled Londoners do not have household access to a car compared with 34 per cent of non-disabled Londoners [11].

### Proportion of Londoners in a household with access to a car (2016/17) [11]

%	Disabled	Non-disabled
<b>Base</b>	<b>(1,729)</b>	<b>(15,831)</b>
0 cars	52	34
1 car	38	45
2+ cars	10	21

LTDS data in this report excludes children aged under five.

## 8.13 Tube

Disabled Londoners are considerably less likely to have used the Tube in the past year than non-disabled Londoners (61 per cent compared with 89 per cent).

The difference is especially noticeable for more frequent Tube use, where only five per cent of disabled Londoners use the Tube five or more days a week, compared with 18 per cent of non-disabled Londoners. Twenty per cent of disabled Londoners use the Tube at least once a week compared with 43 per cent of non-disabled Londoners [11].

### Frequency of Tube use (2016/17) [11]

%	Disabled	Wheelchair user	Non-disabled
<b>Base</b>	<b>(1,729)</b>	<b>(313)</b>	<b>(15,831)</b>
5 or more days a week	5	1	18
3 or 4 days a week	5	1	7
2 days a week	5	1	8
1 day a week	5	2	10
At least once a fortnight	5	3	8
At least once a month	12	9	16
At least once a year	23	18	23
Not used in last 12 months	28	45	6
Never used	11	20	5
Net: Used in the last 12 months	61	35	89

LTDS data in this report excludes children aged under five.

Sixty-three per cent of Londoners who report their travel is limited because they are disabled consider it either impossible to use the Tube without help (30 per cent) or difficult but not impossible to use the Tube (33 per cent), while 33 per cent say it is not difficult to use the Tube and five per cent don't know or never use it [11].

Our investment in making more stations accessible, as part of our Tube upgrade programme, appears to be improving the overall experience of wheelchair users. Thirty-two per cent of wheelchair users say that it is impossible to use the Tube without help (down from 58 per cent), and a further 29 per cent say that it is difficult but not impossible (up from 21 per cent). Thirty-six per cent of wheelchair users take the Tube without difficulties (up from five per cent), while three per cent don't know or never use the Tube (down from 17 per cent) [11].

An increasing number of Tube stations are accessible, including lifts, tactile platform edges and wide gates and we continue our work to increase accessibility across the network [68]. Currently 77 Tube stations, 58 London Overground stations and nine TfL Rail stations have step-free access, while all DLR stations are step-free [tfl.gov.uk/travel-information/improvements-and-projects/step-free-access](http://tfl.gov.uk/travel-information/improvements-and-projects/step-free-access)].



However, there are still many stations without full step-free access, and we have planned improvements for a number of these over the next few years. In 2016, an extra £200m was committed to creating step-free access on the Tube. This will help us take the total number of step-free Tube stations to more than 100. By March 2022, 40 per cent of the Tube network will be step-free – compared with 27 per cent in 2018 [21].

Improvements have also been made to trains on several Underground lines, so that shortly 40 per cent of the Tube network will be served by trains with a high standard of accessibility [21]. New S class rolling stock has been fully implemented on both the Circle line and District line as of 21 April 2017 [70].

We are also planning the introduction of the Tube for London, most probably during the 2020s. The new Tube will have improved accessibility, including step-free access from the platform and more space for wheelchair users [70].

Our social media analysis shows that S class trains have been well received by disabled people, with comments such as:

‘If you have to be in a wheelchair one day... you’d be grateful for a train like this...’ [70]

## 8.14 Cycling

Seventeen per cent of disabled Londoners sometimes use a bike to get around London, which is a smaller proportion than among non-disabled Londoners (where 18 per cent sometimes use a bike) [16].

### Proportion of Londoners who cycle (November 2017) [16]

%	Disabled	Non-disabled
<b>Base</b>	<b>(620)</b>	<b>(1,705)</b>
Cyclist (used a bike to get around London in the last 12 months)	17	18
Non-cyclist (not used a bike to get around London in the last 12 months)	82	83

Column totals may not add to 100 owing to rounding.

Disabled Londoners are more likely to say that they cannot ride a bicycle (22 per cent of disabled Londoners cannot ride a bicycle) than non-disabled Londoners (15 per cent of non-disabled Londoners cannot ride a bicycle) [16].

### Proportion of Londoners able to ride a bicycle (November 2017) [16]

%	Disabled	Non-disabled
<b>Base</b>	<b>(620)</b>	<b>(1,705)</b>
Can ride a bike	76	84
Cannot ride a bike	23	15

Column totals may not add to 100 owing to rounding.

**Disabled Londoners are slightly less likely to say that they never cycle around London than non-disabled Londoners (82 per cent compared with 83 per cent) [16].**

%	Disabled	Non-disabled
<b>Base</b>	<b>(620)</b>	<b>(1,705)</b>
5 or more days a week	3	4
3 or 4 days a week	5	4
2 days a week	4	3
1 day a week	2	2
At least once a fortnight	2	1
At least once a month	-	-
At least once a year	2	1
Not used in last 12 months	-	-
Never used	82	83

We have developed a behavioural change model to look at Londoners' readiness to cycle or cycle more. According to this model, 69 per cent of disabled Londoners are in the 'pre-contemplation' phase (defined below), which is similar to the proportion of non-disabled Londoners at 63 per cent. Both of these figures are slightly lower compared with those reported in November 2014 (73 per cent and 68 per cent respectively) [16]

### **Behaviour change model of non-cyclists (November 2017) [16]**

%	Disabled	Non-Disabled
<b>Base</b>	<b>(620)</b>	<b>(1,705)</b>
<b>Pre-contemplation:</b> 'I have never thought about it but would be unlikely to start in the future' 'I have thought about it but don't intend starting in the future' 'I have never thought of starting but could be open to it in the future'	69	65
<b>Contemplation:</b> 'I am thinking about starting in the future'	7	12
<b>Preparation:</b> 'I have decided to start soon'	6	5
<b>Change:</b> 'I have tried to start recently but am finding it difficult' 'I have started recently and am finding it quite easy so far'	1	2
<b>Sustained change:</b> 'I started a while ago and am still doing it occasionally' 'I started a while ago and am still doing it regularly'	10	9
<b>Lapsed:</b> 'I started doing this but couldn't stick to it'	7	7

## 8.15 Cycling schemes

Awareness of Cycle Hire is very high, with 81 per cent of disabled Londoners and 80 per cent of non-disabled Londoners saying that they know about the scheme [16].

Compared to previous reports, attitudes toward cycling schemes among disabled Londoners appear to be changing. Expected future use of Cycle Hire (people who say that they will probably or definitely use the scheme) is lower among disabled Londoners (24 per cent) than for non-disabled Londoners (29 per cent) [16].

### Expected use of Cycle Hire (November 2017) [16]

%	Disabled	Non-disabled
<b>Base (non-members)</b>	<b>(290)</b>	<b>(852)</b>
Yes, definitely/probably	24	29
Yes, definitely	16	13
Yes, probably	8	16
No, probably not	10	17
No, definitely not	51	34
Not sure	15	20

Awareness of Cycleways is lower than awareness of Cycle Hire among both disabled and non-disabled Londoners. Sixty-seven per cent of disabled Londoners and 64 per cent of non-disabled Londoners are aware of Cycleways [16].

Disabled Londoners are almost as likely as non-disabled Londoners to say that they probably or definitely expect to use Cycleways in the future (27 per cent compared with 28 per cent) [16].

### Expected use of Cycleways (November 2017) [16]

%	All	Disabled	Non-disabled
<b>Base</b>	<b>(1,266)</b>	<b>(324)</b>	<b>(918)</b>
Yes, definitely/probably	27	27	28
Yes, definitely	12	13	12
Yes, probably	15	14	16
No, probably not	15	12	16
No, definitely not	36	43	34
Not sure	21	18	22

## 8.16 Dial-a-Ride

In 2017/18, the Dial-a-Ride scheme was used to make more than one million journeys [71].

Four per cent of disabled Londoners are members of Dial-a-Ride<sup>7</sup> [11]. Members tend to be older than the average disabled Londoner – 82 per cent of Dial-a-Ride members are 65 or over, compared with 41 per cent of all disabled Londoners. Thirty-six per cent of Dial-a-Ride members are 80 to 89-years-old, compared with eight per cent of all disabled Londoners, and 22 per cent of members are 90-years-old or over compared with eight per cent of all disabled Londoners [29].

### Dial-a-Ride membership by age (2016) [2, 30]

%	All disabled Londoners (Census)	Dial-a-Ride members (43,683)
Under 20	7	1
20-34	9	2
35-49	19	4
50-64	25	11
65-79	25	24
80-89	8	36
90+	8	22

Dial-a-Ride members are more likely to be women than the total population of disabled Londoners. Seventy-two per cent of Dial-a-Ride members are women compared with 55 per cent of all disabled Londoners [30, 12]. This is in part related to the age profile of users. However, evidence suggests that women members are over-represented in all age groups, except under 20-year-olds (62 per cent men, compared with 38 per cent women) [29].

Sixty-eight per cent of Dial-a-Ride members are white Londoners and 32 per cent are BAME Londoners [29].

### Door-to-door services (Taxicard)

The London Taxicard scheme provides subsidised door-to-door journeys in licensed taxis and private hire vehicles for London residents who have serious mobility or visual impairments. We part-fund the scheme along with the London boroughs and it is managed by London Councils. Six per cent of disabled Londoners and 23 per cent of London wheelchair users hold a Taxicard [11].

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<sup>7</sup> Not all Dial-a-Ride customers necessarily consider themselves to be disabled.

Among those with a Taxicard there is a spread across frequency of use, with 22 per cent using the card each week and 21 per cent having never used the card or not used it within the past 12 months [11].

### Frequency of use of Taxicard (2016/17) [11]

%	Taxicard holders
<b>Base</b>	<b>(189)</b>
At least once a week	22
At least once a fortnight	14
At least once a month	16
At least once a quarter	10
At least once a year	17
Not used in last 12 months	14
Never used	7
Net: Used in the last 12 months	79

LTDS data in this report excludes children aged under five.

## 8.17 Private hire/taxi

Disabled Londoners are slightly less likely to have used a private hire/minicab in the past year than non-disabled Londoners (49 per cent compared with 58 per cent). Disabled Londoners are slightly more likely to use minicabs frequently though when compared with non-disabled Londoners; eight per cent of disabled Londoners use a minicab at least once a week compared with six per cent of non-disabled Londoners [11].

### Frequency of private hire vehicle use (2016/17) [11]

%	Disabled	Wheelchair user	Non-disabled
<b>Base</b>	<b>(1,729)</b>	<b>(313)</b>	<b>(15,831)</b>
At least once a week	10	10	10
At least once a fortnight	5	5	7
At least once a month	11	9	13
At least once a year	30	24	35
Not used in last 12 months	20	22	12
Never used	23	29	23
Net: Used in the last 12 months	56	48	65

LTDS data in this report excludes children aged under five.

The proportion of disabled and non-disabled Londoners using black cabs in the past year is only slightly different (24 per cent of disabled Londoners have used a black cab in the past year, compared with 28 per cent of non-disabled Londoners). Wheelchair users are more likely to use a black cab at least once a week than all disabled Londoners or non-disabled Londoners (six per cent of wheelchair users) [11].

## Frequency of black cab use (2016/17) [11]

%	Disabled	Wheelchair user	Non-disabled
<b>Base</b>	<b>(1,729)</b>	<b>(313)</b>	<b>(15,831)</b>
At least once a week	3	6	2
At least once a fortnight	2	2	2
At least once a month	3	4	5
At least once a year	16	15	20
Not used in last 12 months	31	29	21
Never used	45	43	51
Net: Used in the last 12 months	24	28	28

LTDS data excludes children aged under five.

## 8.18 Journey purpose

The purpose of weekday journeys made by public transport varies between disabled and non-disabled people. Forty-five per cent of weekday journeys made by disabled Londoners are for the purpose of shopping/personal business, compared with 20 per cent of journeys made by non-disabled Londoners. Twenty-seven per cent of journeys made by disabled Londoners are for leisure (compared with 20 per cent for non-disabled Londoners). Journeys made by disabled Londoners are less likely than journeys made by non-disabled Londoners to be to a usual workplace (six per cent compared with 23 per cent) [11], which could reflect the lower proportion of disabled Londoners who are in work.

### Weekday journey purpose of trips (2016/17) [11]

% of trips	Disabled	Non-disabled
<b>Base – all trips by Londoners</b>	<b>(1,729)</b>	<b>(15,831)</b>
Shopping/personal business	45	20
Leisure	27	20
Education	11	20
Usual workplace	6	23
Other work-related	3	9
Other	8	7

LTDS data excludes children aged under five.

## 8.19 Ticket types

Oyster pay as you go is the most common method for paying for public transport use by disabled Londoners and non-disabled Londoners alike (46 per cent and 55 per cent respectively) [30].

Contactless payment cards are used by eight per cent of disabled Londoners, significantly lower than among non-disabled Londoners where 14 per cent have used the system to pay for public transport in the Capital [30].

## Methods used to pay for public transport (2018) [30]

%	Disabled (170)	Non-disabled (555)
<b>Base: All Londoners:</b>		
Oyster pay as you go	46	55
Contactless payment (card)	36	51
Contactless payment (mobile device)	8	14
Paper ticket for single/return journey	17	18
Paper Travelcard (daily, weekly, monthly)	14	13
Oyster Travelcard	31	36
Net: Oyster	65	74
Net: Contactless	40	53

As respondents could select more than one ticket type, totals may equal more than 100 per cent.

These ticket options were available at the time of the survey but may have changed since. The latest ticketing information is available here: <https://tfl.gov.uk/fares/>

## Travelcards

Disabled Londoners are more likely to hold an older person's Freedom Pass and are less likely to use an Oyster card than non-disabled Londoners.

Even when looking only at disabled Londoners aged under 65 (who are therefore not eligible for the older person's Freedom Pass), Oyster card ownership is lower than among non-disabled Londoners [11]. This may be partly explained by the use of disabled person's Freedom Passes.

## Ticket types held (2016/17) [11]

%	Disabled (all)	Disabled <65 years	Wheel- chair user	Non- disabled
<b>Base</b>	(1,729)	(789)	(313)	(15,831)
Oyster card	26	38	9	63
Older person's Freedom Pass	45	n/a	49	12
Disabled person's Freedom Pass	16	30	18	-

LTDS data in this report excludes children aged under five.

## **8.20 Barriers**

The majority of disabled Londoners (61 per cent) would travel more often than they currently do if they did not experience barriers such as access or cost constraints [55].

Additional journeys that would be made more often if there were no barriers would be for leisure and social activities, such as visiting friends and family (49 per cent), entertainment and exercise (41 per cent), social activities such as going to the pub or to a restaurant (40 per cent) and shopping (34 per cent) [55].

Our research suggests that Londoners with mental health conditions, mobility impairments and long-term illnesses are the most likely to want to travel more often if they did not face barriers (76 per cent, 73 per cent and 73 per cent respectively) [55].

### **8.20.1 Barriers to greater public transport use**

We have carried out several research programmes to investigate the barriers that are faced by Londoners when using public transport and their findings are in general agreement. However, the issue is complex and the specific questions we ask Londoners in our research may have had an influence on the responses. The impact of specific barriers may also be much more significant for some Londoners than others.

Many of the issues faced by disabled Londoners when travelling by public transport are common to both disabled and non-disabled Londoners, particularly overcrowded services, which is the barrier that is mentioned most frequently by both groups (51 per cent and 47 per cent) [13].



## Barriers to using public transport more often (prompted) (2017/18) [13]

%	Disabled	Non-disabled
<b>Base</b>	<b>(1,483)</b>	<b>(4,516)</b>
Overcrowding/ cramped conditions	51	47
Cost of travel	36	43
Disruptions to the service	30	31
Slow journey times	25	28
Passengers pushing and shoving each other	33	24
Unreliable services	26	24
Strikes	24	23
Schoolchildren/youths behaving badly	29	18
Drunken passengers/being aggressive/intimidation	24	20
Dirty environment on the bus/train	21	19
Frequency of the services	21	18
Concern about terrorist attacks	19	17
Concern about being a victim of crime on the bus/Tube/train (robbery, assault or pickpocketing)	18	13
Concern about being a victim of crime getting to and waiting for the bus/Tube/train (robbery, assault or pickpocketing)	18	13
Dirty environment getting to the bus/train	16	13

As respondents could select more than one answer, totals may equal more than 100 per cent.

Although cost of travel (36 per cent) and slow journey times (25 per cent) are among the most significant barriers mentioned by disabled Londoners, the proportion who mention these factors is significantly lower than the proportion of non-disabled Londoners affected by them (43 per cent and 28 per cent respectively for these factors) [13].

For most other issues covered in the survey, disabled Londoners are more likely to say that they are impacted by each barrier compared to non-disabled Londoners [13].

We have carried out additional research among disabled customers to identify specifically the barriers faced when using public transport in London. Overall, we have found that the London transport network is moderately accessible, with areas of excellent provision but some of significant frustration for travellers with accessibility issues.

Many of the specific issues and problems that are experienced are more pronounced on some modes than others. For example, the role that staff play in passengers' experiences on buses is much greater than it is for the Tube (bus drivers are in the front line in providing a better customer experience). Conversely, the quality of the local environment or station facilities have a substantial influence on the accessibility of Overground journeys.

Among disabled Londoners who work, 46 per cent agree that the transport network affects their ability to get to work. This could be improved if a disabled customer was able to get a seat (43 per cent), if the system was less crowded (38 per cent) and if it was more affordable (29 per cent) [55].

## 8.20.2 Improvements

In September 2018, 47 per cent of disabled people stated that ‘TfL is making it easier for disabled people to get around’ [55]. There has also been recognition by many people on social media that improvements in the accessibility and information that was provided to disabled Londoners during the London 2012 Olympic and Paralympic Games has had a legacy effect [48].

‘To its credit, in the last decade, TfL has put a lot of investment into improving the Underground and making it much more accessible...I feel that London hosting the 2012 Games focused energy into making London’s transport infrastructure fit for a leading city. TfL’s work, combined with my experiences at Trailblazers, pushed me into deciding to give the Underground a go.’

Muscular Dystrophy Campaign, Blog

We have also improved street infrastructure. More than half (57 per cent) of disabled Londoners are aware of at least one of these improvements [55].

### Awareness of infrastructure changes (2013) [55]

%	Disabled
<b>Base</b>	<b>(381)</b>
Any one of the following	57
Improvements to road crossings including pedestrian Countdown systems	33
Boarding ramps to allow access from platform to train at Tube stations	31
Online information about accessibility	20
Real-time information on transport service such as whether lifts are in service	18
Travel mentoring schemes to equip people with the skills and confidence to travel independently	11
Videos to show how to use various features of the transport system such as bus boarding ramps	10

## 8.20.3 Physical accessibility as a barrier

Although there has been a real improvement in accessibility across public transport in recent years, particularly in terms of the number of step-free Tube stations, 61 per cent of disabled Londoners<sup>8</sup> still find it difficult to use the Tube and 58 per cent find it hard to use the bus.

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<sup>8</sup> Londoners who say that they have a long-term health problem/disability that limits travel.

## Difficulties accessing public transport (2016/ 2017) [11]

%		Buses	Tube	DLR	Tram
<b>Disabled Londoners (base = 1,473)</b>	Impossible without help	23	27	20	19
	Difficult (but not impossible)	35	34	22	19
	Net: Impossible/difficult	58	61	42	38
	Not difficult to use	40	35	46	49
	Don't know/never use	1	4	13	13
<b>Wheelchair users (base = 313)</b>	Impossible without help	53	56	46	43
	Difficult (but not impossible)	34	27	23	19
	Net: Impossible/difficult	87	85	69	62
	Not difficult to use	9	11	18	6
	Don't know/never use	3	6	13	14

LTDS data excludes children aged under five.

Base: Londoners who report that travel is limited by being disabled.

Disabled customers also report issues when travelling by bus owing to them not stopping or not being able to stop in a position for customers to easily get off the bus [55].

Buses not stopping to let customers on or off is an issue that both disabled and non-disabled Londoners report through complaints. However, the effect upon disabled Londoners can be greater than for non-disabled customers and can cause anxiety and concern. There are many issues, including some that are specific to the type of barriers individual disabled Londoners face:

- Visually impaired customers may not see the bus coming, or may not realise that there is a line of buses and that their bus is not stationed at the bus stop. Visually impaired customers may also not know when to press the call bell to stop the bus
- Hearing impaired customers may not hear the bus arriving
- Physically impaired customers may not be able to move quickly enough down a line of buses
- Wheelchair users may not be able to access the wheelchair priority area owing to use of other wheelchair users or customers with buggies/large luggage

Many disabled people and bus drivers report that the drivers 'try to do the right thing', but this remains an area for more effective driver training [78].

Around 25,000 drivers and 2,000 garage support staff took our 'Hello London' training programme between 2016 and 2018. The course, which builds and improves bus driver customer experience skills, focuses on addressing aspects of our customers' journeys that research shows could be improved. This includes issues such as buses not stopping when requested and sharing more information via announcements on busy or disrupted services [62].

Physical accessibility is also an issue for disabled Londoners when making journeys by walking or when using mobility aids. Sixty-five per cent of disabled Londoners say that they face issues relating to the condition of pavements and 43 per cent cite obstacles on the pavement [55].

## 8.20.4 Differences among disabled people

The experience that disabled people have and their cited barriers related to public transport vary. Barriers can be very specific and people have varied experiences and attitudes when it comes to travelling in London [72].

While every customer's situation makes a difference, we have found variations according to the broad type of impairment that people are living with. Londoners with a mental health condition tend to have the greatest latent demand for travel, as 76 per cent of this group say they would make more journeys if they did not experience barriers [55].

### Differences between disabled people (2013) [55]

%	Wish to travel more (if no barriers)	Find travelling stressful	Believe travelling has got easier in past year
<b>All disabled people</b> (base=381)	61	45	43
<b>Mental health conditions</b> (base=55)	76	51	33
<b>Long-term health conditions</b> (base=123)	72	54	33
<b>Mobility</b> (base=265)	62	46	41

Visually impaired and hearing impaired customer data breaks are not included in the above table owing to limited sample sizes.

The total figure for all disabled people is lower than each category listed in the table. This is because the survey included a wide range of impairments, and a number of respondents recorded multiple impairments.

In 2013, hearing impaired customers were the most likely to experience stress while travelling, but were also the most likely to recognise improvements made to the transport system over the past year [55]. In 2018, feedback from the AIP showed that hearing impaired customers experienced problems on 23 per cent of journeys. The problems they experienced in 2018 are often compounded by the lack of or inconsistent information, as many rely on visual information. When this is not available or is inaccurate, it adversely impacts their experience.

'I entered one of the station entrances at Charing Cross, where I felt that one of the maintenance staff was particularly aggressive, trying to block me. I naturally responded that I was deaf and did not understand but it made him even more aggressive! A uniformed 'stationmaster' rushed up and I explained the same. He was a lot calmer but a little rude, not taking the account that I was deaf and confused over what was the issue. He still wanted to block me and tried to steer out of the station. It's only then when I realised that they wanted me to leave as the barrier was already half down.' [59]

Factors that can have physical symptoms (such as discomfort, pain or tiredness) or emotional impacts (lowered confidence, anxiety or frustration) are often perceived as barriers to greater public transport use among disabled

Londoners. Barriers can affect transport use in a number of ways, such as affecting choice of transport, the time of day that journeys are made and how journeys are planned [73].

### **8.20.5 Travelling by bus for mobility scooter users**

Mobility scooter users face unique challenges when using public transport. We carried out research to develop a policy on travelling by bus for mobility scooter users. Our research results identified the maximum dimensions for a mobility scooter that can be used on public transport. We also found that users differ in their ability to manoeuvre their scooter and this may affect their ability to use it safely on public transport. As users must drive into and out of the bus facing forwards, it is important that enough space is available within the bus for scooters to be turned 360 degrees [74].

In 2012, we launched the mobility aid recognition scheme. for customers with mobility scooters primarily but also for people using aids such as mobility walkers or shopping trolleys, where these are used as a mobility aid. People who want to use a mobility scooter on public transport are encouraged to approach us for a home visit to assess their mobility aid. They are also given advice and guidance on how to travel safely across the network and a Mobility Aid Card. This can be shown to the bus driver to let them know that the device is suitable to travel on a bus.

Most users (85 per cent) are happy with the Mobility Aid Card and say that it has increased their confidence while using the bus (72 per cent) [75].

‘By giving me the Mobility Aid Card I knew full well I was going to be okay and I had the proof by having the card.’

‘It gets me out a bit further than I would normally get out because of my disability. I can travel a bit further.’ [75]

### **8.20.6 Disabled teenagers**

Our research with disabled teenagers identified that many of their perceived barriers to greater public transport use are also experienced by disabled adults and the wider London population [80]. Further information can be found within the Younger people chapter.

## 8.21 Safety and security

Disabled Londoners are significantly less likely than non-disabled Londoners to say that they are ‘not at all worried’ about personal security (ie being safe from crime or antisocial behaviour) while using public transport in London (17 per cent compared with 23 per cent). Additionally, disabled Londoners are more likely to report that they are ‘very worried’ (nine per cent compared with five per cent of non-disabled Londoners) [13].

When combining ‘very’ and ‘quite’ worried, disabled people feel significantly more worried than non-disabled people about their personal security when using public transport in London (37 per cent compared with 28 per cent) [13].

Furthermore, disabled Londoners are more likely than non-disabled Londoners to have experienced a specific worrying incident in the past three months (38 per cent compared with 30 per cent). Among those who have felt worried, more disabled people report experiencing such worry regularly – 27 per cent say that they experienced a worrying event five times or more in the past three months, compared with 20 per cent of non-disabled people who have experienced worrying events with the same frequency [13].

### Levels of concern about personal security when using public transport in London (2017/18) [13]

%	Disabled	Non-disabled
<b>Base</b>	<b>(1,483)</b>	<b>(4,516)</b>
Not at all worried	17	23
A little bit worried	40	45
Quite worried	28	22
Very worried	9	5
NET: Worried	37	28
Don't know	6	5

There are a variety of types of incidents that disabled Londoners are significantly more likely to feel worried by compared to non-disabled Londoners. Such incidents tend to relate to feeling overwhelmed by the volume of people, the behaviour of other passengers, as well as a lack of staff or police presence [13]:

%	Disabled	Non-disabled
<b>Base</b>	<b>(1,483)</b>	<b>(4,516)</b>
Busy environment/large crowds of people	29	22
Passengers pushing and shoving each other	29	22
Threatening behaviour of other passengers	25	20
School children/youths behaving badly	28	19
Lack of a staff presence	23	19
Lack of a police presence	23	18
Large groups of school children/youths	24	15

As respondents could select more than one answer, totals may equal more than 100 per cent.

Disabled Londoners are also more likely than non-disabled Londoners to report feeling worried owing to incidents directly involving themselves, such as being subjected to verbal abuse from other passengers (21 per cent compared with 16 per cent), unwanted sexual behaviour (13 per cent compared with seven per cent), getting lost (11 per cent compared with six per cent) and physical isolation (nine per cent compared with six per cent) [13].

Additionally, disabled Londoners are around twice as likely as non-disabled Londoners to have felt worried by the conduct of the driver/staff. Seven per cent of disabled Londoners said they felt worried owing to verbal abuse from the driver/staff (compared with four per cent of non-disabled Londoners) and eight per cent of disabled Londoners felt worried by the threatening behaviour of the driver/staff (four per cent of non-disabled Londoners). Poor staff conduct is even more concerning for wheelchair users, with 14 per cent worried by verbal abuse and 15 per cent worried by threatening behaviour of the driver/staff [13].

Worrying incidents are more likely to have an immediate impact on disabled Londoners than on non-disabled Londoners (such as changing to another form of transport or stopping the journey altogether). Among those experiencing a specific incident of worry in the past three months, 53 per cent of disabled Londoners took immediate action following the incident compared with 43 per cent of non-disabled Londoners. A significantly greater proportion of disabled Londoners said they changed to another form of transport as a result of feeling worried (33 per cent of disabled Londoners compared with 27 per cent of non-disabled Londoners), rising to 65 per cent among wheelchair users. Disabled Londoners were also significantly more likely to have stopped the journey altogether (20 per cent compared with 16 per cent of non-disabled Londoners) [13].

Similarly, the longer-term impact of worrying incidents is more pronounced among disabled Londoners than non-disabled Londoners. Twenty-one per cent of disabled Londoners were put off using the transport on which they experienced the incident either temporarily (15 per cent) or completely (five per cent), compared with 13 per cent of non-disabled Londoners (10 per cent put off temporarily and three per cent completely). Wheelchair users are even more likely to have been affected, with 31 per cent saying they have stopped using that particular mode either temporarily (22 per cent) or completely (nine per cent) [13].

## **8.22 Unwanted sexual behaviour**

Disabled Londoners are twice as likely as non-disabled Londoners to have experienced unwanted sexual behaviour while using public transport in the past 12 months (17 per cent compared with eight per cent). This rises to 45 per cent among wheelchair users. Such incidents are also more likely to be experienced by disabled Londoners regularly compared with non-disabled Londoners. On average, disabled Londoners experiencing unwanted sexual behaviour faced

3.1 incidents in the past three months, which is significantly higher than the 2.3 incidents experienced on average by non-disabled Londoners [13].

### Experience of unwanted sexual behaviour when using public transport in past 12 months (2017/18) [13]

%	Disabled	Non-disabled
<b>Base</b>	(1,483)	(4,516)
Yes	17	8
No	79	90
Would rather not say	4	2

Although the types of unwanted sexual behaviour experienced by disabled Londoners and non-disabled Londoners are largely comparable, a significantly greater proportion of disabled Londoners experienced serious unwanted sexual behaviour (rape/attempted rape, masturbation, groping/touching or exposure). Forty-four per cent of disabled Londoners were subjected to serious unwanted sexual behaviour, compared with 33 per cent of non-disabled Londoners [13].

Aligned with the severity of unwanted sexual behaviour experienced, disabled Londoners were more than twice as likely as non-disabled Londoners to have reported the incident to someone (41 per cent compared with 18 per cent). Among both disabled Londoners and non-disabled Londoners, the main reasons for not reporting the incident were it was not felt to be serious enough or a sense that nobody would care [13].

## 8.23 Hate crime

Disabled Londoners are significantly more likely than non-disabled Londoners to have experienced hate crime targeted at themselves or witnessed it targeted at others in the past year (29 per cent of disabled Londoners compared with 19 per cent of non-disabled Londoners). The proportion rises to 59 per cent among wheelchair users [13].

### Experience of hate crime when using public transport in past 12 months (2017/18) [13]

%	Disabled	Non-disabled
<b>Base</b>	(1,483)	(4,516)
NET: Yes	29	19
Yes, targeted at me	13	5
Yes, targeted at someone else/others	18	16
No	66	78
Would rather not say	4	3

Certain types of behaviour are significantly more likely to have been experienced or witnessed by disabled Londoners compared with non-disabled



Londoners. Twenty per cent experienced or witnessed spitting (13 per cent of non-disabled Londoners), 16 per cent experienced or witnessed physical assaults (11 per cent of non-disabled Londoners) and 12 per cent experienced or witnessed criminal damage/graffiti (seven per cent of non-disabled Londoners) [13].

There are also some clear distinctions between disabled Londoners and non-disabled Londoners in the perceived motivation for incidents of hate crime experienced or witnessed on public transport in the past 12 months. Disabled Londoners are significantly more likely than non-disabled Londoners to cite disability (19 per cent compared with five per cent) or sexual orientation as the perceived motivation for the incident (16 per cent compared with 11 per cent). The respective proportions rise to 46 per cent and 21 per cent for wheelchair users [13].

As with incidents of unwanted sexual behaviour, hate crime is more likely to be reported by disabled Londoners than by non-disabled Londoners (29 per cent compared with 15 per cent). The reasons for not reporting hate crime incidents are broadly similar among disabled Londoners and non-disabled Londoners, but disabled Londoners are significantly more likely to cite no one being around to report the incident to as a reason for not doing so [13].

## 8.24 Customer satisfaction

### 8.24.1 Overall satisfaction

We measure overall satisfaction with various transport types in London on an 11-point scale, with 10 representing extremely satisfied and zero representing extremely dissatisfied. We then scale this up to 100.

We have standardised satisfaction ratings, as laid out in the following table. This allows us to apply consistent analysis across a wide range of satisfaction research.

Average rating	Level of satisfaction
Under 50	Very low/weak/poor
50-54	Low/weak/poor
55-64	Fairly/relatively/quite low/weak/poor
65-69	Fair/reasonable
70-79	Fairly/relatively/quite good
80-84	Good or fairly high
85-90	Very good or high
90+	Excellent or very high

Levels of satisfaction with public transport among disabled customers are relatively good. Trams are rated particularly highly by disabled customers, receiving an overall satisfaction rating of 91 out of 100, as well as the DLR receiving a rating of 88 out of 100 [15].

In general, the average satisfaction ratings across various transport types tend to be very similar for disabled customers as non-disabled customers.

## Overall satisfaction with transport types (2016/17) [15]

Satisfaction score (0-100)	All transport users	Disabled transport users	Non-disabled transport users
<b>Bus services</b>			
Base	(13,032)	(1,196)	(11,729)
Satisfaction score	86	86	86
<b>TfL Rail</b>			
Base	(4,995)	(125)	(4,678)
Satisfaction score	83	87	84
<b>Underground</b>			
Base	(16,947)	(595)	(16,307)
Satisfaction score	85	84	85
<b>Dial-a-Ride</b>			
Base	n/a	(1,457)	n/a
Satisfaction score	n/a	84	n/a
<b>DLR</b>			
Base	(12,243)	(370)	(11,348)
Satisfaction score	89	88	89
<b>Overground</b>			
Base	(13,209)	(262)	(12,365)
Satisfaction score	84	86	85
<b>Trams</b>			
Base	(3,841)	(319)	(3,289)
Satisfaction score	90	91	91
<b>Black cabs/taxi</b>			
Base	(513)	(63)	(440)
Satisfaction score	84	80	85
<b>Private hire vehicle</b>			
Base	(448)	(54)	(382)
Satisfaction score	83	82	83
<b>Victoria Coach Station</b>			
Base	(1,312)	(83)	(1,229)
Satisfaction score	81	80	81
<b>TLRN</b>			
Base	(9,592)	(1,689)	(7,903)
Satisfaction score	69	70	69

Satisfaction not shown for London River Services and Night buses due to small base sizes.

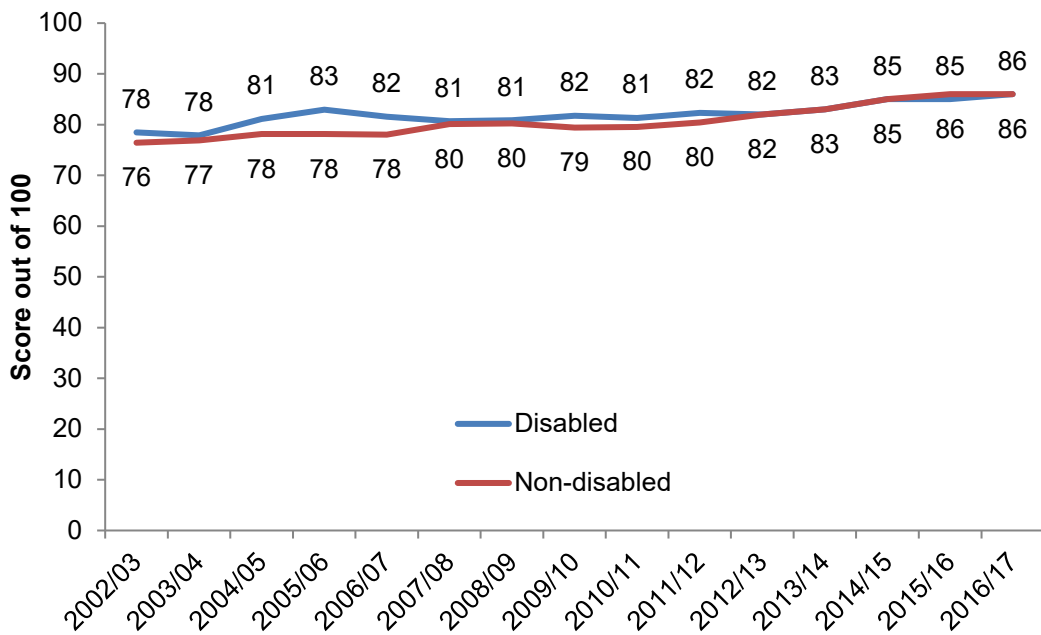
### 8.24.2 Bus

Among disabled people who use the bus, satisfaction is very good at 86 out of 100; this is the same level that we have recorded for non-disabled bus users [15].

Specific elements of bus services are also rated fairly highly by disabled bus users, for example, satisfaction with safety and security on the bus and the driver's behaviour and attitude (both 86 out of 100) [15].

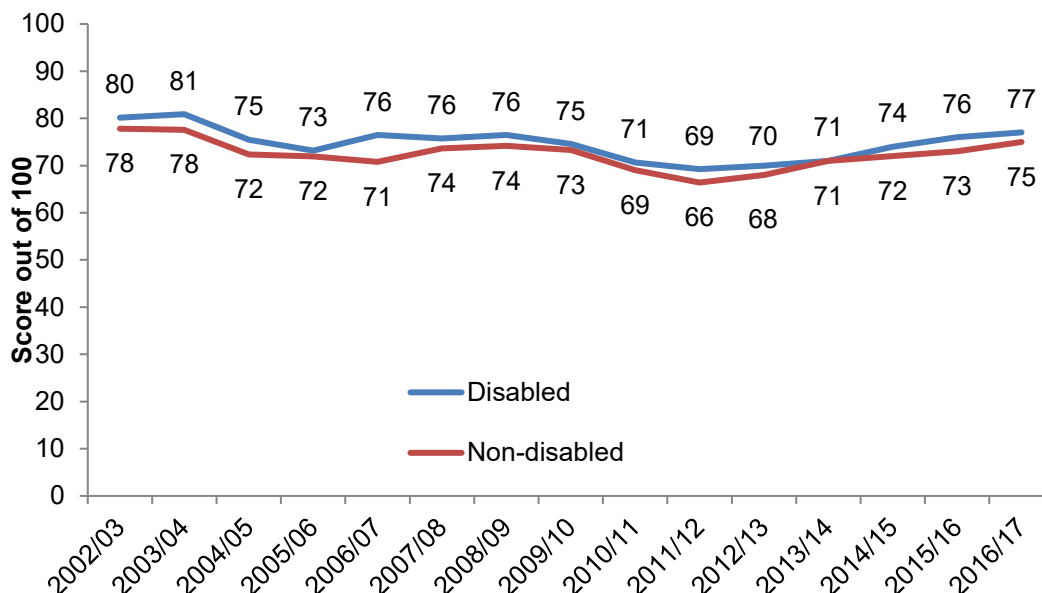
Over time, satisfaction with buses is generally consistent among disabled users [15].

#### Overall satisfaction with buses over time [15]



As with other types of transport, satisfaction with value for money is lower among both disabled and non-disabled customers than satisfaction with other aspects of bus travel (77 out of 100 for disabled Londoners compared with 75 out of 100 for non-disabled Londoners), compared with more than 80 out of 100 for a number of other aspects. [15].

### Satisfaction with value for money with buses over time [15]



### Drivers of satisfaction

From our driver analysis we have found that the drivers of satisfaction with buses among disabled customers are the same as those for non-disabled customers, with the ease of making journeys by bus the most important factor [15].

Satisfaction among bus users is driven by:

### Drivers of satisfaction for bus users [15]

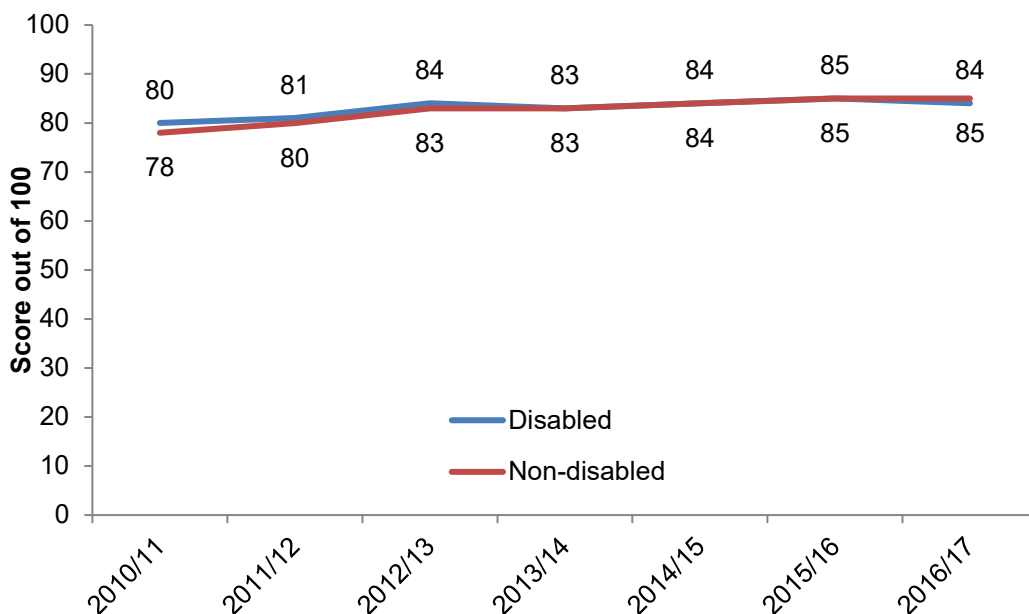
Disabled customers	Non-disabled customers
Ease of making journey	Ease of making journey
Journey time	Journey time
Comfort inside the bus	Comfort inside the bus
Time waited to catch bus	Time waited to catch bus
Smoothness and freedom from jolting	Smoothness and freedom from jolting

### 8.24.3 Tube

Among disabled Tube users, satisfaction is fairly high at 84 out of 100. This is largely in line with non-disabled Londoners (85 out of 100) [15].

Customer satisfaction research shows that satisfaction with various parts of the Tube experience among disabled Tube users is fairly high. For example, personal safety in the station and on the train (both 84 out of 100) [15].

#### Overall satisfaction with the Tube over time [15]



Satisfaction with value for money is higher among disabled users than non-disabled users (79 out of 100 compared with 71 out of 100) [15].

#### Drivers of satisfaction

Satisfaction with the Tube is driven by a number of factors that are focused primarily upon ease, comfort, on-board crowding and journey length. There are few differences in the top five drivers of satisfaction between disabled and non-disabled Tube users [15]:

#### Drivers of satisfaction for Tube users [15]

Disabled customers	Non-disabled customers
Ease of making journey	Ease of making journey
Comfort of journey	Comfort of journey
Train crowding	Length of journey time
Personal safety on train	Length of time waited for train
Smoothness of journey	Train crowding

## Tube accessibility mystery travellers

We carry out mystery traveller accessibility assessments on the Tube. Our research from Quarter 2/Quarter 3 2016/17 found that almost all (92 per cent) of assessments resulted in no issues with anything blocking the mystery travellers' way or impeding them at the entrance or exit of a Tube station. Escalators were not working at each of the three stations assessed. No lifts were found to be out-of-use during the assessments [77].

There were no staff available in one of the three stations assessed. However, where staff were available, most assessors were offered assistance in the ticket hall. Politeness and helpfulness continue to score highly with most interactions rated as 'Excellent/Good' in this wave. In all but one interaction the staff member's response was reported to be clear and easy to understand. [77].

### 8.24.4 Overground

Overall satisfaction among disabled Overground customers is very good at 86 out of 100 and is marginally higher than that of non-disabled users (85 out of 100) [15].

#### Overall satisfaction with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	Disabled	Non-disabled
<b>Base 2016/17</b>	<b>(13,209)</b>	<b>(262)</b>	<b>(12,365)</b>
2009/10	73	75	73
2010/11	80	84	80
2011/12	82	85	81
2012/13	82	85	82
2013/14	82	87	82
2014/15	83	84	83
2015/16	84	83	84
2016/17	84	86	85

Satisfaction with value for money, although not being a top five influencing factor on overall satisfaction, is also fairly high among disabled users (80 out of 100 compared with 73 out of 100 for non-disabled users) [15].

#### Satisfaction with value for money with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	Disabled	Non-disabled
<b>Base 2016/17</b>	<b>(12,491)</b>	<b>(248)</b>	<b>(12,365)</b>
2011/12	72	83	71
2012/13	71	80	71
2013/14	70	81	70
2014/15	73	75	73
2015/16	73	75	73
2016/17	73	80	73

## Drivers of satisfaction

For disabled users of the Overground, satisfaction is mainly driven by the ease of making a journey, their information or assistance needs being met and feeling valued. Similar elements are also main drivers for non-disabled Londoners [15].

### Drivers of satisfaction for Overground users [15]

Disabled customers	Non-disabled customers
Ease of making journey	Ease of making your journey
Information or assistance met needs	Feel valued as a customer
Feel valued as a customer	Information about service disruptions on the train
Trains on this route generally running on time	This train running on time
This train running on time	Comfort of this train

## 8.24.5 Docklands Light Railway (DLR)

Disabled DLR users are very satisfied with the service overall, giving a mean score of 88 out of 100, which is just slightly lower than the satisfaction level reported for non-disabled users (89 out of 100) [15].

### Overall satisfaction with DLR over time – all customers [15]

Satisfaction score (0-100)	All	Disabled	Non-disabled
<b>Base 2016/17</b>	<b>(12,243)</b>	<b>(370)</b>	<b>(11,348)</b>
2009/10	81	83	81
2010/11	81	85	81
2011/12	82	84	83
2012/13	87	87	87
2013/14	87	90	87
2014/15	89	89	89
2015/16	89	90	89
2016/17	89	88	89

Satisfaction with value for money is higher among disabled users than non-disabled users (83 and 79 out of 100 respectively). However, it is lower than overall satisfaction, as with all types of transport [15].



## Satisfaction with value for money with DLR over time – all customers [15]

Satisfaction score (0-100)	All	Disabled	Non-disabled
<b>Base 2016/17</b>	<b>(11,554)</b>	<b>(354)</b>	<b>(11,036)</b>
2011/12	72	78	72
2012/13	74	82	74
2013/14	75	85	75
2014/15	77	81	77
2015/16	78	83	78
2016/17	79	83	79

### Drivers of satisfaction

Satisfaction among disabled users of the DLR is driven by a number of factors such as ease of boarding trains, time waited for trains and information provided inside. Comfort inside the train and length of journeys are bigger factors for non-disabled customers [15].

### Drivers of satisfaction for DLR users [15]

Disabled	Non-disabled
Ease of getting on the train	Ease of making your journey
Length of time waited for the train	Journey length
Information provided inside the train	Comfort inside the train
Reliability of trains	Reliability of trains
Ease of making your journey	Personal safety during the journey

## 8.24.6 Dial-a-Ride

Overall user satisfaction with Dial-a-Ride is fairly high at 84 out of 100.

For various individual elements of the service though, satisfaction levels among disabled users are considered excellent. The highest level of satisfaction is with the helpfulness and courtesy of Dial-a-Ride drivers and cleanliness of vehicles (mean rating of 94 out of 100 for both of these aspects) [15].

### Satisfaction with Dial-a-Ride (2016/17) [15]

Mean rating (0-100)	All
<b>Base</b>	<b>1,086-1,457</b>
<b>Satisfaction with</b>	
Overall	84
Driver	94
Vehicle cleanliness (inside and outside)	94
Ease of getting on and off the bus	92

We organise regular local area meetings across London with users of the Dial-a-Ride service to understand their needs better, receive feedback and make improvements to the service. In late 2013/early 2014 and late 2014/early 2015, we carried out research among Dial-a-Ride customers who attended a feedback meeting to understand how the service meets their needs and how useful the sessions are.

Overall, the meetings were found to be useful and scored highly across many key measures, including overall satisfaction and usefulness. Eighty-nine per cent of attendees stated that they found the workshop format useful and 86 per cent agreed that the meetings met their needs.

Most are satisfied with the service that Dial-a-Ride provides. Comments made about the meetings and service overall included:

‘I am very happy with the service Dial-a-Ride provides.’ (Woman, 70-79)

‘The discussion is much appreciated.’ (Gender and age not given)

‘I wish many would be made aware of meetings so that many people attend as it is very useful to us and company as well.’ (Gender and age not given) [81].

### 8.24.7 Trams

Overall satisfaction with trams is excellent among both disabled and non-disabled customers (both 91 out of 100) [15].

#### Overall satisfaction with trams over time – all customers [15]

Satisfaction score (0-100)	All	Disabled	Non-disabled
<b>Base 2016/17</b>	<b>(3,841)</b>	<b>(319)</b>	<b>(3,289)</b>
2009/10	86	89	86
2010/11	85	88	85
2011/12	86	90	85
2012/13	89	92	89
2013/14	89	90	89
2014/15	89	91	89
2015/16	90	91	90
2016/17	90	91	91

Overall satisfaction with value for money on the tram network is good (82 out of 100). There are no differences in the satisfaction with value for money scores given by disabled and non-disabled customers [15].

## Satisfaction with value for money with trams over time – all customers [15]

Satisfaction score (0-100)	All	Disabled	Non-disabled
<b>Base 2016/17</b>	<b>(2,415)</b>	<b>(99)</b>	<b>(2,284)</b>
2011/12	73	*	73
2012/13	77	79	77
2013/14	78	81	78
2014/15	78	78	78
2015/16	79	78	79
2016/17	82	81	81

\*Denotes small base size (percentages not shown in this report for base sizes of less than 50).

### 8.24.8 Streets

Disabled Londoners are slightly more satisfied with streets and pavements in London compared with non-disabled Londoners. Thinking about the streets on their most recent walking journey, satisfaction among disabled Londoners is quite good (71 out of 100), slightly higher than among non-disabled Londoners (69 out of 100). Disabled Londoners are also slightly more satisfied with streets and pavements on their latest car journey than non-disabled Londoners (65 out of 100 and 62 out of 100 respectively) [33].

Sixty-five per cent of disabled Londoners consider the condition of pavements to be a barrier to walking, and 43 per cent report that obstacles on pavements are a barrier to walking more [55].

#### Overall satisfaction with streets and pavement after last journey over time – walking journey [33]

Satisfaction score (0-100)	All	Disabled	Non-disabled
<b>Base 2018</b>	<b>(951)</b>	<b>(222)</b>	<b>(694)</b>
2017	69	66	70
2018	69	71	69

#### Overall satisfaction with streets and pavements after last journey over time - car journey [33]

Satisfaction score (0-100)	All	Disabled	Non-disabled
<b>Base 2018</b>	<b>(870)</b>	<b>(212)</b>	<b>(627)</b>
2017	63	63	64
2018	63	65	62

### 8.24.9 Transport for London Road Network (TLRN)

Satisfaction with the general impression of the TLRN is reasonable to fairly good. Disabled customers give a score of 66 out of 100 for cycling, 67 out of 100 for walking, 68 out of 100 for driving, 73 out of 100 for travelling by bus on the TLRN [15].

#### Overall satisfaction – general impression of red routes over time [15]

Satisfaction score (0-100)	All	Disabled	Non-disabled
<b>Walking</b>			
Base 2016/17	(3,432)	(608)	(2,824)
2013/14	70	70	70
2014/15	68	67	68
2015/16	68	68	68
2016/17	68	67	68
<b>Travelling by bus</b>			
Base 2016/17	(1,375)	(287)	(1,088)
2013/14	69	70	69
2014/15	71	70	71
2015/16	72	71	71
2016/17	72	73	71
<b>Driving</b>			
Base 2016/17	(2,286)	(389)	(1,897)
2013/14	67	70	67
2014/15	67	67	67
2015/16	70	70	70
2016/17	69	68	69
<b>Cycling</b>			
Base 2016/17	(1,048)	(126)	(922)
2013/14	69	*	69
2014/15	70	71	70
2015/16	62	59	62
2016/17	66	66	66

\*Denotes small base size (data not shown in this report for base sizes of less than 50).

## 8.25 Access to information

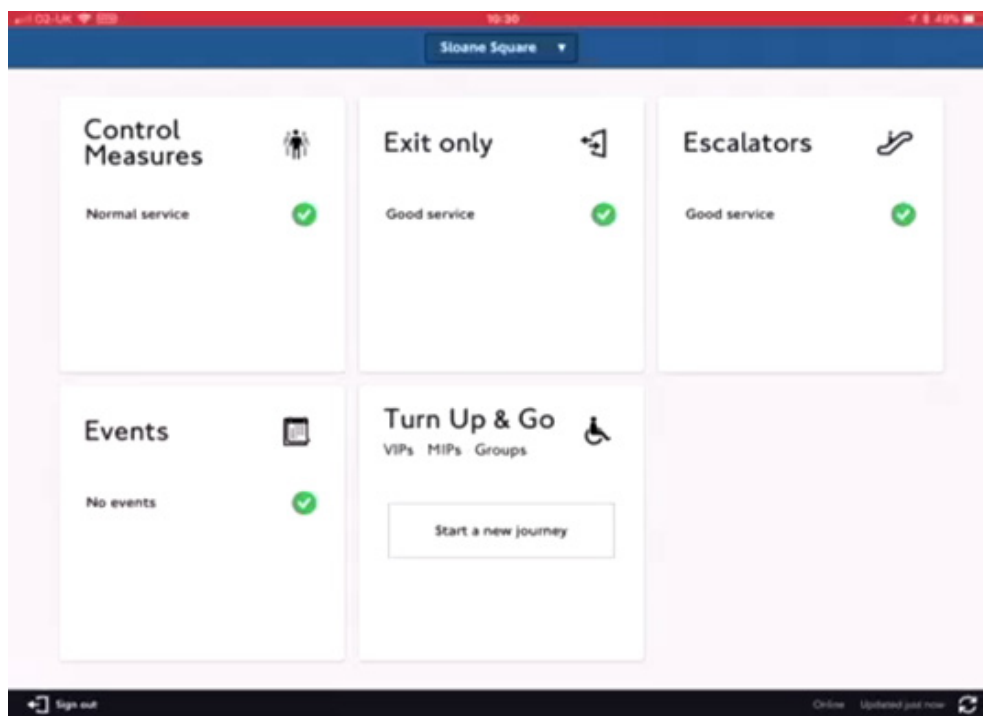
All customers using our transport network need information. Disabled customers have many of the same information needs as non-disabled Londoners, however, where customers have specific impairments these can have a substantial effect upon their travel information needs, particularly around accessibility [79].

Some disabled people plan their journeys meticulously and seek reassurance that at each step along their route they know what to do and where to go, researching suitable, accurate and up-to-date accessibility information for each station and stop that they plan to use. This takes time and can become a barrier for some, especially when alternative travel options are available, such as a car. Information is therefore a major element of the service provided for many disabled customers. [80].

### 8.25.1 Real-time access updates

Many older and disabled people tell us they would like more accurate real-time information, particularly if lifts go 'out of service'. They also tell us real-time information while on the move is critical to help when journeys are disrupted. We are looking at solutions that will help provide better support while people are on the move.

A 'Real-Time Information' (RTI) App was launched across London Underground in May 2018. The app allows staff to capture real-time updates of station-specific information, such as the status of lifts and escalators. Additionally, it provides staff with latest step-free access information to help customers make timely travel decisions and avoid potential delays.



A new Turn Up and Go ‘tile’ was launched on the RTI app in January 2019, enabling staff to log these journeys and share customer details with staff at the interchange and destination stations. There is also additional functionality being launched in 2019:

- Incorporating ‘Tracknet’ to give station staff an accurate arrival time for turn up and go customers and flag journey disruption
- Flagging where step-free access is unavailable at the destination station to inform staff when helping customers to plan their route



Electronic Service Update Boards have been redesigned, with the new version to launch in 2019, including a step-free access live ‘ticker’ permanently scrolling across the bottom of the screen:



A ‘Lift Out of Service’ toolkit has been introduced, with each step-free access station receiving a tailored information pack of posters detailing alternative step-free routes when lifts fail. Forty step-free access stations have the toolkit. The rest are due in February [63].

### 8.25.2 Customer service centre

Providing excellent customer service is very important to us and we are reviewing our processes to make it easier for all customers to use the network. For example, contact centres have assigned accessibility champions and we are ensuring that bus drivers are receiving updated training, which has been developed with the input of disabled customers [21].

### 8.25.3 Access to the internet

Most of the information we provide, including accessibility related information, is available online, often in addition to various offline sources.

Disabled online Londoners are significantly less likely to access the internet in certain places compared with non-disabled online Londoners. Forty-seven per cent of disabled online Londoners access the internet 'at work', significantly lower than the 71 per cent of non-disabled online Londoners. Similarly, a significantly lower proportion of disabled online Londoners access the internet 'on the move' compared with non-disabled online Londoners (70 per cent and 83 per cent respectively) [14].

#### Access to the internet among online Londoners (autumn 2017/spring 2018) [14]

%	All	Disabled	Non-disabled
<b>Base</b>	<b>(2,062)</b>	<b>(456)</b>	<b>(1,562)</b>
Access at home	100	100	100
Access at work	66	47	71
Access 'on the move'	81	70	83

### 8.25.4 Device usage and behaviour

Disabled online Londoners are significantly less likely than non-disabled online Londoners to use a smartphone to access the internet (73 per cent compared with 87 per cent).

#### Proportion of online Londoners who use a smartphone (iPhone, BlackBerry, other) (autumn 2017/spring 2018) [14]

%	All	Disabled	Non-disabled
<b>Base</b>	<b>(2,001)</b>	<b>(268)</b>	<b>(1,688)</b>
Uses a smartphone	84	73	87

**Proportion of mobile phone owners who have ever accessed the internet on their mobile device among online Londoners (autumn 2017/spring 2018) [14]**

%	All	Disabled	Non-disabled
<b>Base</b>	<b>(1,802)</b>	<b>(225)</b>	<b>(1,539)</b>
Ever accessed the internet on a mobile device	91	86	93

**Apps**

Many of the specific information needs expressed by disabled customers may be well suited to an app, particularly when they have been designed to be accessible for disabled people. Customers with cognitive impairments also suggest that facilities such as drop-down menus and visual cues, which are often part of apps, can help them to find the route that they need in an easier way than some websites [56].

The use of apps has increased considerably in the past few years, particularly among disabled Londoners [14]. There is little difference in the proportion of disabled and non-disabled online Londoners that use specific apps in relation to travel in London (43 per cent and 45 per cent respectively).

**8.25.5 Use of the TfL website**

The TfL website contains a wealth of information that answers many of the needs that disabled customers raised during our qualitative research. Some disabled customers who use the TfL site tend to agree that it contains most of the information that they need. The main barrier that we face to ensure that we get our information to people who need it is that disabled customers are not always using the site or are not currently using it in an optimised way [56].

Among all disabled online Londoners, 84 per cent have ever used the TfL website. This compares to 90 per cent of non-disabled online Londoners [14].

Disabled Londoners are less likely to visit the TfL website at least three to four times a week than non-disabled users (12 per cent compared with 18 per cent) [14].





### Proportion of Londoners who use tfl.gov.uk (autumn 2017/spring 2018) [14]

%	All	Disabled	Non-disabled
<b>Base</b>	<b>(2,062)</b>	<b>(456)</b>	<b>(1,562)</b>
Uses TfL website	89	84	90
Daily	27	25	27
Up to 3-4 times a week	17	12	18
Up to 3-4 times a month	20	20	20
About once a month	11	11	11
Less than once a month	14	16	13
Never	11	16	10

The most common reason for both disabled and non-disabled online Londoners to visit the TfL website is for journey planning. However, compared with non-disabled users, disabled users are significantly less likely to visit the TfL website for this reason (70 per cent compared with 77 per cent of non-disabled online Londoners) [14].

Similar proportions of disabled online Londoners and non-disabled online Londoners report using the TfL website for reasons other than journey planning [14].

### Reasons for visiting the TfL website (autumn 2017/spring 2018) [14]

%	Disabled	Non-disabled
<b>Base (online Londoners)</b>	<b>(456)</b>	<b>(1,562)</b>
Journey planning	70	77
Ticketing (information and buying)	27	31
Viewing maps	29	29
Budgeting	16	19
Information about roads	12	12
Information about cycling	5	4

As respondents could select more than one answer, totals may equal more than 100 per cent.

#### 8.25.6 Social media

Social media offers many opportunities for disabled people to be informed and share experiences [70]. Social media comments made about accessibility fall into two main categories: general access concerns and lifts and ramps, indicating that day-to-day problems concern commentators more than bigger issues [84].

Most of our stakeholders have social media feeds to be able to engage with and interact with their members. Their support on social media has been vital in raising awareness of TfL campaigns and initiatives, such as #PrioritySeatingWeek, which encourages customers to consider others when using priority seats.

Customers have also had traction with their own social media campaigns, which relate to our work, such as #LookUp which asks people travelling on public transport to look up to see if someone is in greater need of their seat, and #askdontgrab which aims to educate customers on asking wheelchair users if they would like a push (rather than just doing it).

## Case Study: 'Please offer me a seat' campaign



Our PAs make a significant contribution to our customers' safety and the smooth-running of our network.

Our messages include the vital instruction for customers to offer a seat to those who may need it. This helps to prevent incidents of people being ill as we know that if someone who needs to is able to sit down then we significantly reduce the number of activated passenger emergency alarms.

We also all know from either first- or second-hand experience that finding a seat when you need it most can be the difference between a safe journey and an unsafe journey. However, it can sometimes be a tough challenge on one of the busiest metro networks in the world.

Corry Shaw, a disabled customer who lives with chronic pain that means she needs a seat when travelling, caught the attention of the public through press and social media. Although she wears a 'Please offer me a seat badge', Corry has found most commuters avoid eye contact, sometimes unintentionally, which can make it difficult to ask for a seat. As a result, Corry launched the Look Up campaign and called for ours and the Mayor's support for her plea to customers to look up and offer their seat to people in greater need.

On Monday 16 July 2018 our new wording changed to include Corry's message:

'Please look up to see if anyone needs your seat more than you do. If someone is unwell and requires assistance, please help them off at the next station.'

One of our Instructor Operators, said: 'This is definitely a good thing. Communicating this effectively with customers is key, because we need to get them to communicate with each other and be more considerate when they're travelling. We've all been guilty of getting stuck in our devices when we travel at one time or another, but it only takes a few seconds to look up and see if someone needs your seat more than you. To coin a phrase, we're all on this planet together – so let's help each other.'

### 8.25.7 Paper-based maps and timetables

Maps and timetables are widely used by disabled customers, referring to them both at home and on the journey. The disabled sign is used as a quick reference to whether the station will be accessible [56]. There is evidence that disabled customers have a higher reliance on paper-based sources than non-disabled customers. However, this may be owing to the higher proportion of disabled customers who are older than among non-disabled customers [45].

Many disabled customers consider paper maps and timetables to be easy to use, read and understand and offer reassurance while on the journey, especially during a disruption. They also provide customers with time to digest the information in a tangible way [56].

We discussed paper-based information sources. Reflecting other research and wider findings, disabled Londoners were generally very positive about each of the resources shown to them. However, awareness that the information was provided in this format was often very low.

- Tube map with accessibility icons – found to be very useful and to provide instant accessibility information at a glance. There was, however, some confusion about exactly what the accessibility icons mean, particularly the icon referring to step-free access from street to platform; some customers were unsure whether they could board the train at these stations
- Toilet facilities Tube map – felt to be very useful as several customers pre-plan journeys around toilet availability
- Enlarged Tube map – felt to be clear to read and understand
- Audio Tube map – hearing-impaired customers included in the research said this was a great way to obtain this information
- Tube map in black and white – although recognised as a useful resource, there were some specific improvements suggested around the labelling of lines
- Tube map showing tunnels – created to help people with claustrophobia and anxiety who find it difficult to use the Tube [56]

### Tube information products

Many disabled Londoners are impressed with the materials we produce to help customers plan and complete their journeys, once aware of them. Our products encourage a sense of inclusion and help to reassure people about their Tube travel. However, awareness of them was low, and beyond an explicit assumption that ‘some accessibility information’ would exist, very few people knew of their availability [12].

## **Step-free Tube guide**

The standard Tube map contains information on whether a station has step-free access from street to train, or street to platform. This is generally well received and commonly referred to by disabled Londoners [56].

A key piece of information that we have provided to help people - particularly wheelchair users - to navigate the Underground network is the Step-free Tube guide. This guide provides much more detail on the accessibility of specific stations. Disabled customers whom we asked about the guide felt it to be useful, once they understood it [56]. Among disabled Londoners who use the Tube and who were shown an image of the step-free Tube map, 55 per cent were aware of the guide and 36 per cent said that they had used it [45].

The guide provides a large amount of information about the detailed accessibility parameters of Underground stations. Once people had studied the guide, they said that they felt it was highly useful and the information empowering. The guide encouraged some disabled customers to consider using the network more and with greater confidence and reassurance. However, initially the guide can be seen as overwhelming due to the amount of information it contains [56].

## Case Study: Victoria Tube station becomes step free



Victoria has become our 75<sup>th</sup> step-free station, improving access to the transport network for millions of people.

We've installed seven new lifts, making journeys step-free between the street and Victoria line trains and the District and Circle line platforms. Customers from Victoria's Network Rail station can also travel step-free to the Tube station and change between the three Tube lines.

The station is the fourth busiest station on the Underground, serving more than 79 million customers each year. The new lifts will help ensure the station is accessible to all people, including disabled or older customers, parents or carers with buggies and people with heavy luggage. They are part of an upgrade project that has almost doubled the station's size.

Work on the Victoria Station Upgrade Programme started in 2011. The first phase – the new north ticket hall entrance and exit to Bressenden Place in Victoria Street – was completed at the end of 2016.

Mark Wild, London Underground Managing Director, said: 'Victoria Underground is one of our busiest stations and one of the first major Tube stations encountered by visitors to the Capital. The provision of step-free access marks a major milestone, as it provides greater access to the Underground as well as vital interchanges between Tube journeys and a seamless connection with National Rail services.'

'We are improving step-free access across our network and we are determined to do all we can to ensure our customers experience all London has to offer.'

### 8.25.8 Signage

An audit of station signage was carried out at step-free access stations in 2018 to check it was accurate, accessible, consistent, visible and intuitive. Independent Disability Advisory Group members attended the audit at four of the stations: Waterloo, London Bridge, Green Park and King's Cross [Accessibility delivery group update].

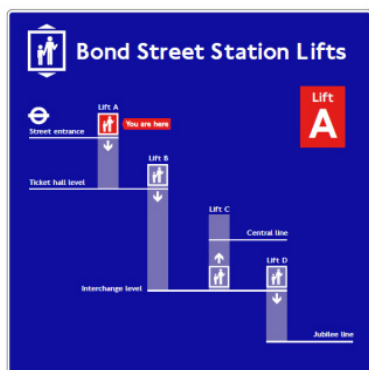
Based on the findings of the audit, new accessible signage standards were compiled and will be introduced across the network.

Additional blue step-free access signs have been installed at King's Cross, London Bridge, Waterloo, Westminster and Green Park.



Wider station signage improvements will start at these stations in 2019 including wide-aisle gates, high-level signage, lift schematics and level access boarding information.

CURRENT LIFT GUIDE DESIGN



NEW LIFT GUIDE DESIGN



Improved visibility of platform humps through new floor markings and hanging signage is planned across the network in 2019, to improve visibility across the platform, especially during crowding.

## **Legible London**

Feedback from disabled Londoners in our development of the Legible London wayfinding system showed that the style of maps was well received and that, in general, the wayfinding system was popular. There was some acknowledgement that maps and signs cannot meet the needs of all disabled people with, for example, the maps needing to be a different height for wheelchair users as opposed to Londoners with visual impairments [82].

## **iBus display**

The iBus information system on buses is welcomed by bus users, not just disabled Londoners.

One area for potential improvement would be for one iBus display to face the front of the bus on the lower level as the current location is not visible by wheelchair users [56]. This is the case on the New Routemaster and is noted as a positive by the wheelchair user mystery travellers [83].

‘The big improvement for me was having an iBus display positioned at the rear of the bus for rear-facing passengers.’

(Wheelchair user using New Routemaster) [83]

Customer satisfaction data provides a score of 85 out of 100 for interior bus information among disabled customers, compared with 86 out of 100 given by non-disabled customers [15].

For passengers with partial or full hearing loss, bus travel is often the preferred way to travel as it provides access to the driver and the iBus display [68]. Hearing-impaired customers also report making full use of the ability to see where they are through the windows and this is cited as another reason to prefer the bus over other types of transport [56].

London buses have shown printed route and destination bus blind displays on the front, side and rear of each bus for many years. With advances in digital technology it is now difficult to tell the difference between a printed or digital blind.

By linking the displays to our iBus system we’ll be able to accurately and automatically change the destination at the end of each trip and display more dynamic information, such as ‘via points’ and ‘bus full’.

The LED displays are on certain buses operating from the West Ham garage and the Triaxle bus (TA1) from Camberwell, and the LCD displays are on one bus (SEe9) operating on routes 507/521 from the Waterloo garage.

Research shows that customers have a very short time in which to look at the destination displays as a bus approaches and make a decision to board the bus or not. It is therefore necessary to keep the information clear and simple. It is readily accessible to bus users and maintains the look of the more familiar conventional London bus blinds [62].



## **Pedestrian Countdown**

Pedestrian Countdown has been introduced at pedestrian crossings to show the time counting down after the 'green for pedestrians' phase ends and before the 'green for vehicles' phase begins. Shortly after the introduction of pedestrian crossing countdowns, 50 per cent of disabled Londoners reported seeing it around the Capital and 40 per cent of disabled Londoners had used it; almost everyone who had used the system found it useful [45].

New technology is being tested that will further help Londoners when using pedestrian crossings. The technology will adjust the light phasing when a lot of people are waiting and allow greater time for pedestrians to cross at busy times.

### **8.25.9 Disruptions**

Information is particularly important to customers in the event of a disruption. While many disabled Londoners are confident travellers, many also recognise that the impact of disruptions can be greater for them, and they have a concern that they could easily get stuck [80].

Disabled customers have concerns about disruptions. These concerns are also experienced by non-disabled customers, however, disruptions can be more impactful for disabled customers because they can face greater difficulties overcoming their effects. Disabled customers report that they can experience anxiety during delays and that access to reliable, live information is essential to minimising this [56].

Disabled customers want to know:

- How long the disruption will last
  - Some disabled customers say they would prefer to stay with their original plan if the disruption is not likely to last too long, so this information can help them decide whether it is absolutely necessary to change their travel plan
  - This information is also needed to control anxiety for some customers and maintain a sense of control during the journey
- How they can reach their destination if their original route is disrupted
  - Customers look for information to tell them what to do next, and expect us to advise them of a new route or to signpost them towards where they can find relevant information
  - Disabled customers do not want to be the last to know – this is especially true for hearing-impaired customers who can feel excluded by audio announcements

- Whether the new route will be accessible
  - This is particularly important for customers who experience barriers owing to a mobility or visual impairment
  - Distances to and location of alternative transport types – how far they will need to walk and where to
  - Customers also look for information about the station that they have arrived into unexpectedly

The presence of staff during disruptions provides much reassurance for disabled customers as they expect them to be experts in advising on new accessible routes and providing live up-to-date information.

Some disabled customers also suggest that apps and interactive information points at stations or stops would be useful to communicate disruption-related information as this can be accessed during the journey [56].

### **8.25.10 Accessible Customer Information (2016)**

We have a wealth of accessibility information and data available, which can be presented to customers with accessibility needs to help them plan a journey. This information is provided across a variety of formats and channels encompassing printed information leaflets, posters and signs as well as digital real-time information such as Journey Planner and social media feeds.

We have carried out research to identify and reduce information gaps to develop and improve our accessibility information materials, exploring information needs, usage and awareness and assessment of gaps.

- As in 2013, awareness of the majority of materials (printed in particular) is low. Increasing awareness and distribution is the quickest win for us as the materials are useful and in high demand particularly among those with greater needs
- The degree to which detailed accessibility information is useful is dictated by the severity of the barrier faced by customers and travel time available. Customers with fewer specific accessibility needs and little time are simply looking for the fastest route option
- Customers find the detailed printed accessibility-specific resources extremely helpful. Only minor amendments/additions are needed. No new printed materials are required, however some new printed formats would be useful, particularly printing some materials currently only available as a PDF
- Printed information will always be needed by those with more severe needs who can't use digital devices, but most customers are moving towards digital resources, ie apps with on-the-go and 'live update' benefits. Multi-channel information provision is therefore important
- There are many apps on the market, which provide highly useful accessible travel information, filling some of the gaps in our information offering. A quick win is to highlight the best of the existing apps to customers

- Journey Planner is the key TfL resource, having high awareness and being widely used. There are some additions that could be made to make this even more useful – primarily around detailed navigation and access information for stations
- As in 2013, TfL staff are a vital resource for disabled customers. Ensuring they have specialist accessibility information and knowledge will enable them to provide better assistance to disabled customers

We found that several factors influence disabled customers' information needs and travel behaviours:

- 1) Extent of barrier: The severity of the barrier combined with journey time available, dictates to what extent disabled customers will find more detailed (printed) accessibility information useful
- 2) Move to digital: Printed materials will always have their place for a minority of customers; however, a growing majority of customers seek 'live' information pre-journey and on-the-go and increasingly through apps
- 3) Network knowledge and travel start point: Those who live centrally and use the network regularly are less likely to plan and use information tools, even for less familiar journeys
- 4) Lack of awareness of printed information: The biggest challenge facing us is the lack of awareness of all the more detailed, disability-specific printed information. All other considerations, for example, whether customers would prefer the information in print or digital form become academic if customers are unaware of its existence

The information sought is often the same for all disabled and non-disabled customers:

- Route options: Including for instance the fastest and step-free. But customers look for a range of possible options onto which they overlay their own knowledge and preferences for stations, lines and transport options
- Timings: Transport arrival times, journey times, interchange times
- Disruptions and changes: What is the nature of disruption, how long the disruption is likely to affect their journey and what are the alternative travel options that would meet their needs?

However, disabled customers require a greater level of information on the following inter-connected aspects of travel, specifically around navigation, accessibility of different modes and comfort – in general they need reassurance and confidence that the journey will run as smoothly as possible and reduce anxiety.

The biggest issue to address was the lack of awareness of key, disability-specific materials. Disabled customers reacted positively to such materials that were relevant to them and felt they would enhance their planning abilities and provide reassurance during their travel experiences.

Most customers use more than one source of information to help with planning – online is the most widely preferred source (used by 77 per cent of disabled customers and used by 69 per cent among those with visual impairments).

Detailed information on the presence of lifts, escalators and level access is very important for customers with mobility impairments (60 per cent found this useful). Information on toilet maps, station maps was particularly helpful for those with learning

disabilities and information about the level of congestion at stations was particularly important for customers with mental health issues.

## 9 People on lower incomes

### Key findings

- Twenty-eight per cent of Londoners live in lower income households (household income of less than £20,000 per year), lower than the level seen in 2013/14 (36 per cent) [11]
- Women, disabled people, BAME Londoners and older people are more likely to live in low income households than other Londoners [11]
- Londoners from lower socio-economic groups (C2DE) are less likely to agree that 'TfL cares about its customers' than Londoners from higher socio-economic groups (ABC1) (43 per cent compared with 49 per cent) [90]
- Low income Londoners tend to travel less frequently than Londoners overall – 2.2 trips per weekday on average compared with 2.4 among all Londoners [11]
- The most common type of transport used by Londoners on lower incomes is walking (93 per cent walk at least once a week) in line with all Londoners (95 per cent) [11]
- The bus is the next most common type of transport used by Londoners on lower incomes (69 per cent use the bus at least once a week, compared with 59 per cent of all Londoners) [11]
- Londoners living in lower income households are more likely than all Londoners to have an older person's Freedom Pass (26 per cent compared with 15 per cent) [11]
- Londoners with a lower household income are less likely to hold an Oyster card than all Londoners (49 per cent compared with 60 per cent) [11]
- Online Londoners living in DE households (social grade D refers to semi- and unskilled manual workers and E refers to state pensioners, casual/lowest grade workers and unemployed Londoners) are less likely than all online Londoners to access the internet 'on the move' (69 per cent compared with 81 per cent) or at work (37 per cent compared with 66 per cent). They are also less likely to use a smartphone (76 per cent compared with 84 per cent) [14]

## 9.1 Summary – People on Lower Incomes

### 9.1.1 Profile of Londoners in low income households

The definition of 'low income' is imprecise since it is a relative concept in which household wealth depends on a number of factors, including household size and non-income related wealth. Twenty-eight per cent of Londoners can be classified as having a lower annual household income (below £20,000<sup>9</sup>) [11]. In some cases, data for specific income groups is not available and socio-economic groups DE are used as a proxy. Those classified as DE live in households where the chief income earner is either in semi-skilled/unskilled manual work, or is unemployed.

Londoners living in lower income households (below £20,000) are more likely to be:

- Women (55 per cent compared with 50 per cent all Londoners)
- BAME people (44 per cent compared with 37 per cent all Londoners)
- Older people (24 per cent are aged over 65, whereas people in this age group make up 13 per cent of the total London population)
- Disabled people (20 per cent compared with nine per cent all Londoners) [11]

### 9.1.2 Transport behaviour

Londoners with lower household incomes (below £20,000) tend to make fewer weekday trips than Londoners overall (2.2 compared with 2.4) [11].

The most commonly used type of transport is walking (93 per cent walk at least once a week) [11].

The bus is the next most commonly used form of transport. Compared with 59 per cent of all Londoners using the bus at least once a week, 69 per cent of people with lower household incomes take the bus. This rises to 70 per cent among the lowest household income bracket (less than £5,000). [11].

- Londoners with lower household incomes are less likely to use a car (both as a driver and passenger), train and Tube than all Londoners. This is most pronounced with driving a car (23 per cent compared with 38 per cent overall) and using the Tube at least once a week (32 per cent compared with 41 per cent overall) [11]
- The proportion of Londoners with access to at least one car falls with decreasing household income, so that 73 per cent of Londoners in the lowest household income bracket (less than £5,000) do not have access to a car compared with 35 per cent of all Londoners [11]
- Londoners with lower household incomes are less likely to hold an Oyster card than all Londoners (49 per cent compared with 60 per cent) [11]
- Londoners in DE households are less likely to cycle. Eight per cent sometimes used a bike to get around London in the past year compared with 17 per cent of all Londoners [16]

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<sup>9</sup> The cut-off point of £20,000 is used here since data are typically collected using this income bracket.

- Awareness of Cycle Hire (73 per cent) and Cycleways (57 per cent) is lower among DE households compared to all Londoners (80 per cent and 65 per cent respectively) aware of the schemes [16]

### 9.1.3 Customer satisfaction

TfL customer satisfaction survey data shows that overall satisfaction with transport in London among DE Londoners is broadly consistent with satisfaction levels of all Londoners [15].

- Overall satisfaction with the bus is high (86 out of 100) and has increased over time. Satisfaction with value for money of the bus is comparable between Londoners living in a household with income of £20,000 or less and all Londoners (74 out of 100 compared with 75 out of 100 respectively) [15]
- Overall satisfaction with the Tube is also high among Londoners living in lower income households (87 out of 100), slightly higher than the score provided by all Londoners (85 out of 100). Satisfaction with value for money of the Tube is also slightly higher (73 out of 100) compared with all Londoners (71 out of 100 for), most likely related to the increased ownership of Freedom Passes [15]

### 9.1.4 Access to information

Online Londoners living in DE households are less likely than online Londoners overall to access the internet at work or 'on the move'. Sixty-nine per cent of online DE Londoners access the internet 'on the move, significantly lower than 81 per cent of all online Londoners. The disparity in internet access at work is even greater, with 37 per cent of online DE Londoners doing so, compared with 66 per cent of all online Londoners [14].

A lower proportion of online Londoners living in a DE household access the TfL website (84 per cent compared with 93 per cent of all online Londoners). While the most common reason to visit the TfL website is for journey planning; this group is less likely to do this than all online Londoners (61 per cent compared with 76 per cent) [14].

Smartphone use is also lower – (76 per cent of online DE Londoners compared with 84 per cent of all online Londoners) [14].

## 9.2 Introduction

Household wealth depends upon a number of factors, not just household income. Among other things, household size, level of savings, benefits (often not considered as income within market research surveys) and lifestyle all play a part in how affluent a person might be.

We recognise the needs of Londoners with low incomes within the Single Equality Scheme. This group includes a diverse mix of Londoners who are more likely to be older, retired, women, people who are out of work and disabled people. It is recognised that these groups are more likely to have travel needs associated with affordability and accessibility of information [21].

Consequently, the main categories in this chapter are all Londoners and Londoners with an annual household income of less than £20,000<sup>10</sup>.

Additionally, we refer to the following sub-categories of household income to provide further understanding of how low income can affect travel attitudes and behaviours:

- Less than £5,000
- £5,000–£9,999
- £10,000–£14,999
- £15,000–£19,999
- £20,000–£24,999
- More than £25,000

Where data is not available for household incomes, the classification of DE social grade is used as a proxy for low income. Social grades are determined through a series of questions on the occupation of the chief income earner in the household. Social grade D refers to semi- and un-skilled manual workers and E refers to state pensioners, casual/lowest grade workers and unemployed Londoners [85].

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<sup>10</sup> The cut-off point of £20,000 is used here since data are typically collected using this income bracket.



### 9.3 Profile of low income people in London

An annual income of less than £20,000 is the definition used within this report for 'low income'. Twenty-eight per cent of Londoners live in a household with this income level, lower than the proportion observed in 2013/14 (36 per cent) [11].

#### Profile of annual household income for all Londoners (2016/17) [11]

%	All Londoners
<b>Base</b>	<b>(17,560)</b>
Less than £5,000	5
£5,000–£9,999	8
£10,000–£14,999	8
£15,000–£19,999	8
£20,000–£24,999	8
£25,000+	64

LTDS data in this report excludes children aged under five.  
Where percentages do not add up to 100, this is owing to rounding.

**LTDS demographic profile of people on low incomes in London (2016/17)**  
**[11]**

%	All	Less than £20k	Less than £5,000	£5,000–£9,999	£10,000–£14,999	£15,000–£19,999	£20,000–£24,999
	(17,560)	(4,966)	(840)	(1,365)	(1,424)	(1,337)	(1,417)
<b>Gender</b>							
Men	50	45	46	42	45	48	47
Women	50	55	54	58	55	52	53
<b>Age</b>							
5-10	9	9	9	9	10	9	10
11-15	6	7	5	8	6	7	7
16-24	12	14	17	12	13	14	12
25-59	56	41	42	38	39	46	52
60-64	4	5	6	3	4	5	4
65-70	5	8	6	10	10	6	4
71-80	5	10	8	12	10	8	7
81+	3	6	6	8	7	5	3
<b>Ethnicity</b>							
White	62	54	55	55	51	58	57
BAME	37	44	43	43	47	41	42
<b>Working status*</b>							
Working full-time	44	15	3	8	16	29	38
Working part-time	9	10	4	11	12	10	8
Student	7	10	15	10	10	8	7
Retired	13	26	25	30	27	20	15
Not working	12	22	37	24	18	16	14
<b>Disabled</b>							
Yes	9	20	26	25	18	14	10
No	91	80	74	75	82	86	90
<b>Impairment affects travel</b>							
Yes	8	18	24	22	15	12	8
No	92	82	76	78	85	88	92

\*LTDS data in this report excludes children aged under five and working status does not include under-16s.

All TfL surveys use the Equality Act 2010 to define disabled people as those who define themselves as having a long-term physical or mental disability or health issue that impacts on their daily activities, the work they can do, or limits their ability to travel.

Londoners living in a low income household are more likely to be women than men. Among Londoners with household income under £20,000, 56 per cent are women, compared to 51 per cent of all Londoners who are women. However, under-25s living in a low income household are evenly split between men and women (49 per cent women compared with 51 per cent men) [2].

**Proportion of women among those living in lower income households – less than £20,000 per year (2016/17) [11]**

<b>% women</b>	<b>Low income Londoners</b>
All	55
Under 25	48
25-64	56
65+	60

Base: Londoners with household income less than £20,000 pa: all (5,510), under 25-year-olds (1,567), 25 to 64-year-olds (2,356), 65-year-olds and over (1,587)

\*LTDS data in this report excludes children aged under five.

## 9.4 Employment

Transport can be a significant barrier to accessing employment. Two out of five jobseekers say that a lack of transport acts as a barrier to getting work, and one in four say that the cost of transport presents a problem with getting to interviews [38].

As household incomes increase, the proportion of Londoners in work also rises [11].

Among Londoners living in households with the lowest annual income levels, under £10,000 a year, 28 per cent are retired (26 per cent in 2013/14) [11].

## 9.5 London boroughs

**Boroughs with the highest proportion of residents with low household incomes (2016/17) [11]**

<b>Borough</b>	<b>% of low income households</b>
Newham	40
Hackney	38
Southwark	37
Tower Hamlets	37
Brent	36

LTDS data in this report excludes children aged under five.

The boroughs with the lowest proportion of residents living in households with an annual income of £20,000 or less are:

**Boroughs with the lowest proportion of residents with low household incomes (2016/17) [11]**

Borough	% of low income households
Richmond upon Thames	17
Wandsworth	18
Sutton	19
Hounslow	20
Kingston upon Thames	20
Merton	20

LTDS data in this report excludes children aged under five.

**9.6 Travel behaviour**

The average number of trips made per weekday rises with increasing household income. For Londoners with an annual household income of less than £20,000, the average number of trips per weekday is 2.2 (down from 2.5 in 2013/14), and for Londoners with household income of below £5,000, the average number of trips made per weekday drops to 1.9 (2.3 in 2013/14), compared with 2.4 for all Londoners (2.7 in 2013/14) [11].

**Average number of weekday trips made (2016/17) [11]**

Income group	Average number of weekday trips
All	2.4
Less than £20,000	2.2
Less than £5,000	1.9
£5,000–£9,999	2.2
£10,000–£14,999	2.2
£15,000–£19,999	2.3
£20,000–£24,999	2.2
£25,000 +	2.5

LTDS data in this report excludes children aged under five.

According to our Customer Touchpoints customer segmentation typology, people with lower household incomes often fall into the categories of ‘travel shy’ or ‘reassurance seeker’. Both groups tend to lack confidence in using the public transport network. For Londoners classified as ‘travel shy’, familiar routes and transport options appeal more than making unfamiliar journeys. ‘Reassurance seekers’ will conduct their journeys seeking advice along the route from staff and members of the public [44].

## 9.7 Transport types used

Walking is the most commonly used type of transport by Londoners with low incomes. Ninety-three per cent of Londoners with an annual household income of £20,000 or less walk at least once a week (94 per cent in 2013/14) in line with 95 per cent of all Londoners (96 per cent in 2013/14) [11].

Buses are the next most commonly used type of transport among Londoners with a lower annual household income. Among Londoners with household incomes under £5,000, 69 per cent use the bus at least once a week (down from 75 per cent in 2013/14). This figure decreases progressively with increasing household income bands so that 63 per cent of Londoners living in households with an income of £20-£24,999 use the bus at least once a week (64 per cent in 2013/14) – more in line with the proportion of all Londoners using the bus weekly (59 per cent) [11].

As seen previously, for all other types of transport (those used by at least 10 per cent of Londoners), a smaller proportion of Londoners with a lower household income use each type of transport at least once a week than all Londoners. Most notably, this includes driving (23 per cent drive at least once a week compared with 38 per cent of all Londoners), travelling as a car passenger (38 per cent compared with 44 per cent), National Rail (11 per cent compared with 17 per cent) and travelling by Tube (38 per cent compared with 41 per cent) [11].

Similar levels of use continue to be seen between all Londoners and Londoners living in low income households for the Overground, minicabs, DLR, trams and motorbikes [11].

### Proportion of Londoners using all types of transport at least once a week (2016/17) [11]

%	All	All less than £20,000	Less than £5,000	£5,000–£9,999	£10,000 – £14,999	£15,000 – £19,999	£20,000 – £24,999
<b>Base</b>	<b>(17,560)</b>	<b>(4,966)</b>	<b>(840)</b>	<b>(1,365)</b>	<b>(1,424)</b>	<b>(1,337)</b>	<b>(1,417)</b>
Walking	95	93	91	92	93	95	95
Bus	59	69	70	71	69	68	63
Car (as a passenger)	44	38	35	37	37	41	44
Car (as a driver)	38	23	16	20	26	27	32
Tube	41	32	36	30	29	36	36
National Rail	17	11	11	11	9	11	15
Overground	12	11	10	13	8	11	11
Other taxi/minicab (private hire vehicle)	10	9	9	10	7	10	8
London taxi/black cab	3	2	2	2	1	2	2
DLR	5	5	5	5	6	6	7
Tram	2	2	2	1	3	4	3
Motorbike	1	1	1	-	1	1	1

LTDS data in this report excludes children aged under five. As respondents could select more than one answer, totals may equal more than 100 per cent.

## 9.8 Walking

Ninety-three per cent of Londoners with household income of less than £20,000 a year walk at least once a week, in line with 94 per cent in 2013/14. This remains a similar proportion compared to all Londoners (95 per cent). Most Londoners walk almost every day; 80 per cent of Londoners living in a household with an annual income of less than £20,000 walk at least five times a week, slightly less all Londoners (84 per cent); in line with the respective proportions in 2013/14 of 80 per cent and 83 per cent [11].

### Frequency of walking (2016/17) [11]

%	All	All less than £20,000	Less than £5,000	£5,000–£9,999	£10,000 – £14,999	£15,000 – £19,999	£20,000 – £24,999
<b>Base</b>	<b>(17,560)</b>	<b>(4,966)</b>	<b>(840)</b>	<b>(1,365)</b>	<b>(1,424)</b>	<b>(1,337)</b>	<b>(1,417)</b>
5 or more days a week	84	80	77	78	80	83	84
3 or 4 days a week	5	7	7	7	6	7	4
2 days a week	4	3	4	3	4	3	4
1 day a week	2	3	3	3	3	1	2
At least once a fortnight	-	-	-	1	-	-	-
At least once a month	1	1	1	-	1	-	1
At least once a year	1	1	1	1	1	-	-
Not used in last year	1	2	1	2	2	2	2
Never used	3	3	6	3	2	2	2

LTDS data in this report excludes children aged under five.

When we consider specific journey purposes for walking, some differences appear between all Londoners and Londoners living in DE households (used as a proxy for lower income). Londoners living in DE households are less likely than all Londoners to make walking journeys of any kind at least once a week [18].

### Walking at least once a week by purpose of journey (2018) [18]

% who walk at least once a week	All	DE
<b>Base</b>	<b>(946)</b>	<b>(70)</b>
• To complete small errands such as getting a newspaper or posting a letter	78	76
• As part of a longer journey	69	60
• To visit friends and relatives	51	48
• To visit pubs/restaurants/cinemas and other social places	57	41
• To get to work/school/college	50	44
• To take a child to school	32	27

## 9.9 Bus

Sixty-nine per cent of Londoners in a low income household use the bus at least once a week, compared with 59 per cent of all Londoners (70 per cent and 61 per cent respectively in 2013/14) [11].

The frequency of bus travel increases with lower household incomes; 70 per cent of Londoners with household income of less than £5,000 use buses at least once a week, compared with 63 per cent of Londoners with household income between £20,000 and £24,999 (in line with 75 per cent and 64 per cent respectively in 2013/14) [11].

People living in households with a lower annual income are also more likely to use the bus every day; 30 per cent of Londoners living in a household with an annual income of less than £20,000 use the bus at least five times a day compared with 26 per cent of all Londoners (largely in line with the 2013/14 proportions of 33 per cent and 28 per cent respectively) [11].

### Frequency of travelling by bus (2016/17) [11]

%	All	All less than £20,000	Less than £5,000	£5,000–£9,999	£10,000 – £14,999	£15,000 – £19,999	£20,000 – £24,999
<b>Base</b>	<b>(17,560)</b>	<b>(4,966)</b>	<b>(840)</b>	<b>(1,365)</b>	<b>(1,424)</b>	<b>(1,337)</b>	<b>(1,417)</b>
5 or more days a week	26	30	29	32	29	29	30
3 or 4 days a week	12	15	18	17	14	12	13
2 days a week	11	14	13	14	15	13	10
1 day a week	11	11	10	8	11	13	10
At least once a fortnight	7	5	4	5	5	6	6
At least once a month	10	7	7	7	8	7	10
At least once a year	14	9	9	7	11	10	12
Not used in last year	6	6	4	6	5	6	6
Never used	4	4	5	4	2	3	3

LTDS data in this report excludes children aged under five.

### Bus journey purpose

Londoners living in low income households and all Londoners are using buses during the day for similar reasons. However, at night a greater proportion of Londoners living in low income households use the bus for work-related journeys and a lower proportion for leisure reasons when compared to all Londoners [27].

## Purpose of bus journey by income and time of day (2014) [27]

%	During the day				At night			
	All	<£10k	£10-£15k	£15-£20k	All	<£10k	£10-£15k	£15-£20k
To/from work	51	47	56	56	51	54	67	63
To/from school/education	7	10	6	6	4	5	2	3
To/from shopping	11	13	11	11	1	2	1	1
Visiting friends/relatives	9	10	8	8	13	13	10	10
Leisure	7	5	5	5	18	13	10	15
Other purpose	14	15	15	14	13	13	10	8

Base: for each income group is unknown, base for all respondents 32,021 Day;  
7,741 Night

### 9.10 Car

Londoners living in households with a lower income are less likely to drive a car frequently. Twenty-one per cent of all Londoners drive at least five days a week compared with 13 per cent of Londoners living in a household with a lower income (in line with 22 per cent and 13 per cent respectively in 2013/14) [11].



## Frequency of travelling by car (2016/17) [11]

%	All	All less than £20k	Less than £5k	£5k–£9,999	£10k–£14,999	£15k–£19,999	£20k–£24,999
<b>Base</b>	<b>(17,560)</b>	<b>(4,966)</b>	<b>(840)</b>	<b>(1,365)</b>	<b>(1,424)</b>	<b>(1,337)</b>	<b>(1,417)</b>
<b>5 or more days a week:</b>							
Driver	21	13	8	12	13	16	18
Passenger	8	7	6	7	8	8	9
<b>3 or 4 days a week:</b>							
Driver	6	5	3	4	6	5	6
Passenger	8	7	8	6	7	8	9
<b>2 days a week:</b>							
Driver	7	3	3	2	5	3	5
Passenger	14	11	8	11	12	12	14
<b>1 day a week:</b>							
Driver	4	2	1	2	2	3	3
Passenger	14	12	13	12	10	13	12
<b>At least once a fortnight:</b>							
Driver	1	1	-	-	1	1	1
Passenger	7	6	6	5	9	5	9
<b>At least once a month:</b>							
Driver	2	1	1	1	1	1	1
Passenger	11	12	10	12	15	10	9
<b>At least once a year:</b>							
Driver	3	2	2	2	2	3	3
Passenger	19	21	21	23	21	19	19
<b>Not used in last year:</b>							
Driver	5	8	8	10	7	6	6
Passenger	6	8	6	9	7	8	6
<b>Never used:</b>							
Driver	51	66	73	68	63	62	57
Passenger	13	15	22	16	11	16	13

LTDS data in this report excludes children aged under five.

Of Londoners aged 17-years-old or over with household income of less than £20,000, 54 per cent have a driving licence – lower than the 73 per cent of all Londoners (both proportions in line with those observed in 2013/14, 54 per cent and 71 per cent respectively) [11].

### Proportion of Londoners aged 17 or over with any driving licence (2016/17) [11]

Income group	Holds a driving licence (%)
All	73
Less than £20,000	54

LTDS data in this report excludes children aged under five.

Forty-two per cent of Londoners with household income of less than £20,000 have household access to a car compared with 65 per cent of Londoners overall (45 per cent and 65 per cent respectively in 2013/14). This declines to 27 per cent among Londoners in the lowest household income bracket (less than £5,000), the same proportion as in 2013/14 [11].

### Proportion of Londoners in a household with access to a car (2016/17) [11]

%	All	Less than £20k	Less than £5k	£5k– £9,999	£10k– £14,999	£15k– £19,999	£20k– £24,999
<b>Base</b>	<b>(17,560)</b>	<b>(4,966)</b>	<b>(840)</b>	<b>(1,365)</b>	<b>(1,424)</b>	<b>(1,337)</b>	<b>(1,417)</b>
0 cars	35	58	73	64	52	50	36
1 car	44	37	23	33	41	45	55
2+ cars	21	5	3	2	7	6	9

LTDS data in this report excludes children aged under five.

## 9.11 Tube

Weekly use of the Tube among Londoners living in lower income households is lower than Londoners overall: 32 per cent of Londoners with household income less than £20,000 compared with 41 per cent of all Londoners (in line with the 2013/14 proportions of 31 per cent and 39 per cent). The pattern also remains true for daily Tube travel, 10 per cent compared with 17 per cent (nine per cent and 15 per cent in 2013/14) [11].

## Frequency of travelling by Tube (2016/17) [11]

%	All	All less than £20k	Less than £5k	£5k–£9,999	£10k–£14,999	£15k–£19,999	£20k–£24,999
<b>Base</b>	<b>(17,560)</b>	<b>(4,966)</b>	<b>(840)</b>	<b>(1,365)</b>	<b>(1,424)</b>	<b>(1,337)</b>	<b>(1,417)</b>
5 or more days a week	17	10	8	8	10	12	15
3 or 4 days a week	7	7	8	7	6	6	6
2 days a week	8	7	8	6	6	8	7
1 day a week	9	9	12	9	7	9	8
At least once a fortnight	8	8	10	7	8	8	7
At least once a month	15	15	12	15	16	16	14
At least once a year	23	24	23	24	26	25	28
Not used in last year	8	13	9	16	15	11	7
Never used	6	7	11	8	6	5	8

LTDS data in this report excludes children aged under five.

## 9.12 Cycling

Londoners in DE households are considerably less likely than all Londoners to cycle (eight per cent compared with 17 per cent). They are also far less likely to know how to cycle (73 per cent compared with 81 per cent) [16].

### Proportion of Londoners who cycle (autumn 2017) [16]

%	All	DE
<b>Base</b>	<b>(2,367)</b>	<b>(272)</b>
Cyclist (used a bike to get around London in the last 12 months)	17	8
Non-cyclist (not used a bike to get around London in the last 12 months)	83	92

### Proportion of Londoners able to ride a bike (autumn 2017) [16]

%	All	DE
<b>Base</b>	<b>(2,367)</b>	<b>(272)</b>
Can ride a bike	81	73
Cannot ride a bike	19	27

### Frequency of travelling by bicycle (autumn 2017) [16]

%	All	DE
<b>Base</b>	<b>(2,367)</b>	<b>(272)</b>
5 or more days a week	3	2
3 or 4 days a week	4	2
2 days a week	3	1
1 day a week	2	1
At least once a fortnight	2	-
At least once a month	-	-
At least once a year	2	1
Not used in last year	-	-
Never used	83	92

We have developed a behavioural change model to look at Londoners' readiness to cycle or cycle more. Three quarters (76 per cent) of DE Londoners classify themselves as being in the 'pre-contemplation' stage (see the following table for the definition), significantly lower higher than for all Londoners (66 per cent). The proportions observed in November 2014 were 67 per cent and 69 per cent respectively [16].

Five per cent of Londoners living in DE households are classified as being in the 'sustained change' category, meaning that they started cycling a while ago and are still doing it occasionally or regularly. However, this is lower compared with all Londoners at nine per cent (eight per cent and 10 per cent respectively in November 2014) [16].

### Behaviour change model of cycling (autumn 2017) [16]

%	All	DE
<b>Base</b>	<b>(2,367)</b>	<b>(272)</b>
<b>Pre-contemplation:</b> 'I have never thought about it but would be unlikely to start in the future' 'I have thought about it but don't intend starting in the future' 'I have never thought of starting but could be open to it in the future'	66	76
<b>Contemplation:</b> 'I am thinking about starting in the future'	10	9
<b>Preparation:</b> 'I have decided to start soon'	5	5
<b>Change:</b> 'I have tried to start recently but am finding it difficult' 'I have started recently and am finding it quite easy so far'	2	-
<b>Sustained change:</b> 'I started a while ago and am still doing it occasionally' 'I started a while ago and am still doing it regularly'	9	5
<b>Lapsed:</b> 'I had started doing this but couldn't stick to it'	7	5

### 9.13 Cycling schemes

Compared to all Londoners, people living in DE households are less likely to be aware of Cycle Hire. Eighty per cent of all Londoners are aware, compared with 73 per cent of Londoners living in DE households [16].

Twenty-two per cent of casual Cycle Hire users (defined as not having a membership key) live in a household with an annual income of £20,000 or less, and six per cent of members live in a household with an annual income of £20,000 or less [28].

Members of DE households are far less likely than all Londoners to say they will (probably/definitely) use Cycle Hire in the future (15 per cent of those living in DE households compared with 28 per cent of all Londoners) [16].

### Expected use of Cycle Hire in the future (autumn 2017) [16]

%	All	DE
<b>Base (non-members)</b>	<b>(1,165)</b>	<b>(141)</b>
Yes, definitely/probably	28	15
Yes, definitely	14	7
Yes, probably	14	8
No, probably not	15	14
No, definitely not	38	48
Not sure	19	23

Awareness of Cycleways is lower among those living in DE households compared with all Londoners (57 per cent compared with 65 per cent) [16].

Members of DE households are less likely to state that they (probably/definitely) expect to use them in future as all Londoners (18 per cent compared with 28 per cent) [16].

### Expected use of Cycleways in the future (autumn 2017) [16]

%	All	DE
<b>Base</b>	<b>(1,266)</b>	<b>(149)</b>
Yes, definitely/probably	28	18
Yes, definitely	12	4
Yes, probably	15	14
No, probably not	15	8
No, definitely not	36	48
Not sure	21	26

## 9.14 Journey purpose

Reflecting the lower levels of employment among Londoners living in a household with an income of less than £20,000 per year, journeys to a usual workplace account for 10 per cent of weekday journeys, compared with 22 per cent for all Londoners (nine per cent and 20 per cent respectively in 2013/14). Other work-related journeys make up five per cent of journeys among those with an income of less than £20,000 per year, compared with nine per cent for all Londoners (both in line with the 2013/14 proportions of five per cent and nine per cent respectively) [11].

A greater proportion of journeys are completed for the purposes of shopping and personal business: 31 per cent for Londoners with household income of less than £20,000 compared with 22 per cent all Londoners (in line with 31 per cent and 22 per cent observed in 2013/14) [11].

### Weekday journey purpose (2016/17) [11]

%	All	All less than £20k	Less than £5k	£5k–£9,999	£10k–£14,999	£15k–£19,999	£20k–£24,999
<b>Base – all trips by Londoners</b>							
Shopping/personal business	22	31	33	34	33	26	25
Usual workplace	22	10	3	6	12	16	18
Leisure	20	21	22	21	21	22	17
Education	20	26	32	29	22	23	23
Other work-related	9	5	4	3	5	6	9
Other	7	7	7	6	7	8	7

LTDS data in this report excludes children aged under five.

## 9.15 Ticket types

Oyster pay as you go is more commonly used by Londoners living in DE households than all Londoners; 62 per cent of DE Londoners have used Oyster pay as you go to pay for public transport in the past year compared with 53 per cent of all Londoners. A similar pattern is observed for Oyster Travelcards; 22 per cent compared with 12 per cent [30].

However, use of contactless payment options to pay for public transport in the last year is markedly lower among Londoners living in DE households compared to all Londoners. Thirty-five per cent have used a contactless payment card in the past year, compared with 47 per cent of all Londoners. There is even greater disparity in the use of mobile devices to make contactless payments, with just four per cent, significantly lower than 34 per cent of all Londoners [30].

### Methods used to pay for public transport (2018) [30]

%	All	DE
<b>Base: All Londoners:</b>	<b>(750)</b>	<b>(172)</b>
Oyster pay as you go	53	62
Contactless payment (card)	47	35
Oyster Travelcard	12	22
Paper ticket single/return	18	13
Paper Travelcard	13	7
Contactless payment (mobile device)	34	4
Net: Oyster	72	73
Net: Contactless	49	35

As respondents could select more than one ticket type, totals may equal more than 100 per cent.

These ticket options were available at the time of the survey but may have changed since. The latest ticketing information is available here: <https://tfl.gov.uk/fares/>

## Travelcards

Reflecting the differences observed in ticket use, 51 per cent of Londoners in households with an income of less than £20,000 do not have an Oyster card compared with 40 per cent of all Londoners (both in line with 2013/14 proportions of 52 per cent and 40 per cent) [11].

Londoners living in lower income households are more likely to hold an older person's Freedom Pass than all Londoners: 26 per cent compared with 15 per cent (24 per cent and 15 per cent in 2013/14) [11].

### Ticket types held (2016/17) [11]

%	All	All less than £20k	Less than £5k	£5k–£9,999	£10k–£14,999	£15k–£19,999	£20k–£24,999
<b>Base</b>	<b>(17,560)</b>	<b>(4,966)</b>	<b>(840)</b>	<b>(1,365)</b>	<b>(1,424)</b>	<b>(1,337)</b>	<b>(1,417)</b>
Have an Oyster card	60	49	48	42	49	55	60
Do not have an Oyster card	40	51	52	58	51	45	40
Older person's Freedom Pass	15	26	24	30	28	21	17
Disabled person's Freedom Pass	1	3	6	4	2	2	1

LTDS data in this report excludes children aged under five.

Even when looking only at lower income Londoners aged under 65 (who are therefore not eligible for the older person's Freedom Pass), Oyster card ownership is lower than among the equivalent age group of all Londoners: 62 per cent Londoners aged under 65 from lower income household compared with 67 per cent all Londoners aged under 65 (60 per cent and 67 per cent respectively in 2013/14) [11].

## 9.16 Customer satisfaction

### 9.16.1 Overall satisfaction

We measure overall satisfaction with various transport types in London on an 11-point scale, with 10 representing extremely satisfied and zero representing extremely dissatisfied. We then scale this up to 100.

We have standardised satisfaction ratings, as laid out in the following table. This allows us to apply consistent analysis across a wide range of satisfaction research.



Average rating	Level of satisfaction
Under 50	Very low/weak/poor
50-54	Low/weak/poor
55-64	Fairly/relatively/quite low/weak/poor
65-69	Fair/reasonable
70-79	Fairly/relatively/quite good
80-84	Good or fairly high
85-90	Very good or high
90+	Excellent or very high

Satisfaction levels remain very similar for those living in DE households or households with a lower income and all customers [15].

For bus services, customers living in households with income of £20,000 or less give a very good overall satisfaction rating of 86 out of 100, on par with the mean score of 86 given by all Londoners (both 85 in 2014/15). Likewise, Tube customers give a similar satisfaction mean rating of 87 out of 100 to the 85 given by all customers (85 and 84 respectively in 2014/15) [15].

**Overall satisfaction with transport types – all customers (2016/17) [15]**

<b>Satisfaction score (0-100)</b>	<b>All</b>	<b>Household income £20,000 or less</b>	<b>Household income over £20,000</b>
<b>Bus services</b>			
Base	(13,032)	(4,732)	(4,319)
Satisfaction score	86	86	86
<b>Night bus</b>			
Base	(769)	(294)	(276)
Satisfaction score	85	86	84
<b>TfL Rail</b>			
Base	(4,955)	(849)	(2,879)
Satisfaction score	83	86	83
<b>Underground</b>			
Base	(16,947)	(3,513)	(10,476)
Satisfaction score	85	87	85
<b>Overground</b>			
Base	(13,209)	(2,407)	(7,492)
Satisfaction score	84	85	85
<b>DLR</b>			
Base	(12,243)	*	*
Satisfaction score	89		
<b>London River Services</b>			
Base	(1,040)	(82)	(609)
Satisfaction score	90	90	90
<b>Private Hire Vehicles</b>			
Base	(448)	(65)	(311)
Satisfaction score	83	78	83
<b>Taxis</b>			
Base	(513)	(78)	(343)
Satisfaction score	84	83	83
<b>Trams</b>			
Base	(3,841)	(1,172)	(1,618)
Satisfaction score	90	92	91
<b>Victoria Coach Station</b>			
Base	(1,312)	(547)	(479)
Satisfaction score	81	82	81
<b>TLRN</b>			
Base	(9,592)	(2,720)	(5,700)
Satisfaction score	69	70	70

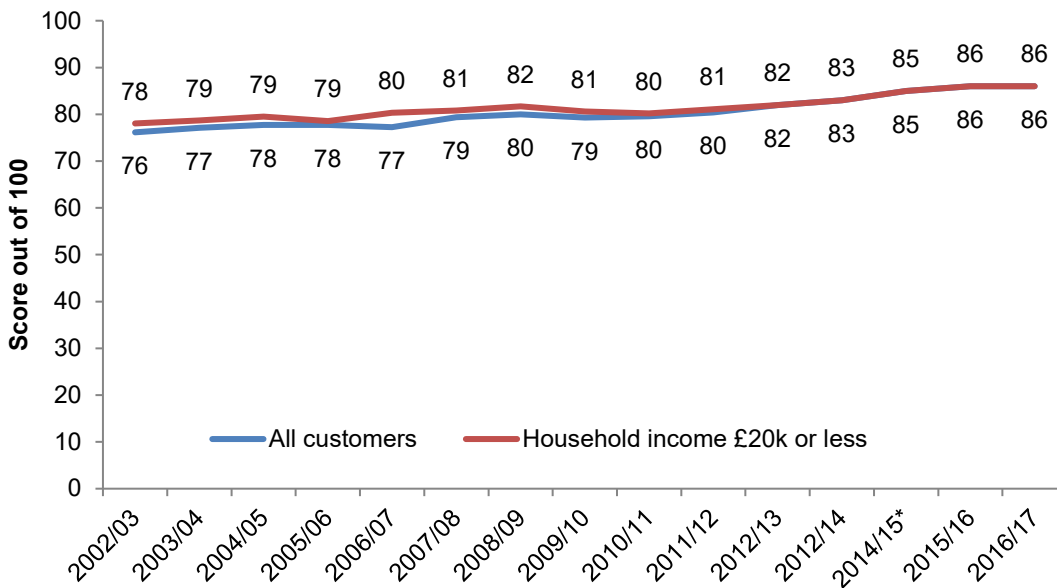
“Satisfaction is not shown for Dial-a-Ride as the data is not available for income or social grade.

### 9.16.2 Bus

Customers using buses give an overall satisfaction score of 86 out of 100 which is considered very good or high. Satisfaction is at the same level among customers with household income of £20,000 or less who use the bus (86 out of 100) [15].

Satisfaction ratings have steadily risen over the past six years [15].

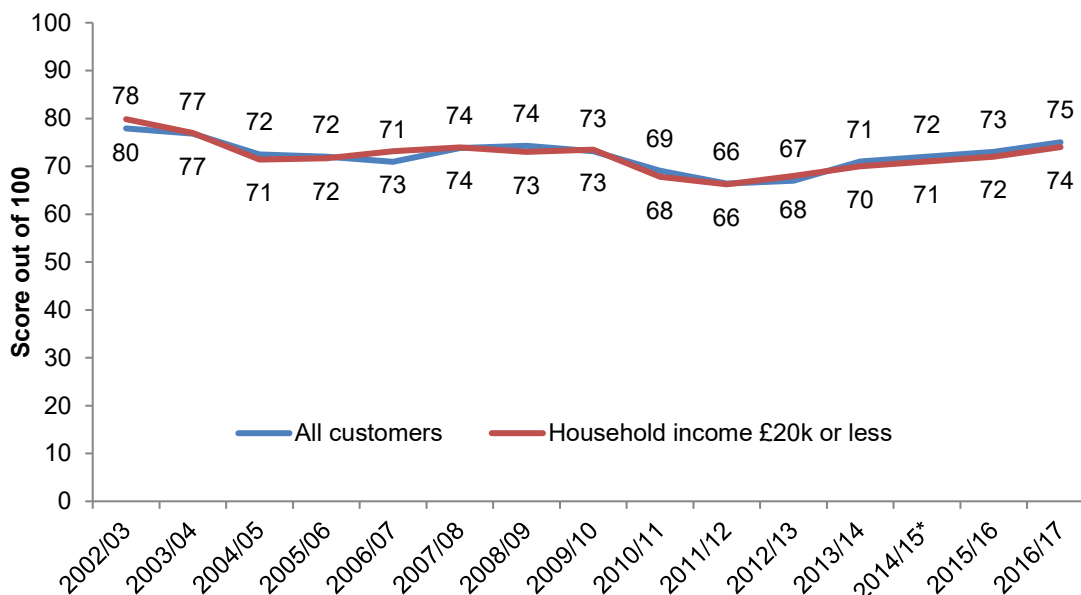
#### Overall satisfaction with buses over time [15]



\*Household income £20,000 or less.

Satisfaction with value for money stands at 74 out of 100 for customers with household income of £20,000 or less, in line with the score of 75 out of 100 for customers overall. Satisfaction with value for money has increased gradually since 2011/12 [15].

### Satisfaction with value for money with buses over time [15]



Household income £20,000 or less.

### Drivers of satisfaction

There is little difference between the main drivers of overall satisfaction among customers living in a household with an annual income of less than £20,000 and all customers, with ease of making a journey, journey time and comfort inside the bus being the primary drivers of satisfaction [15].

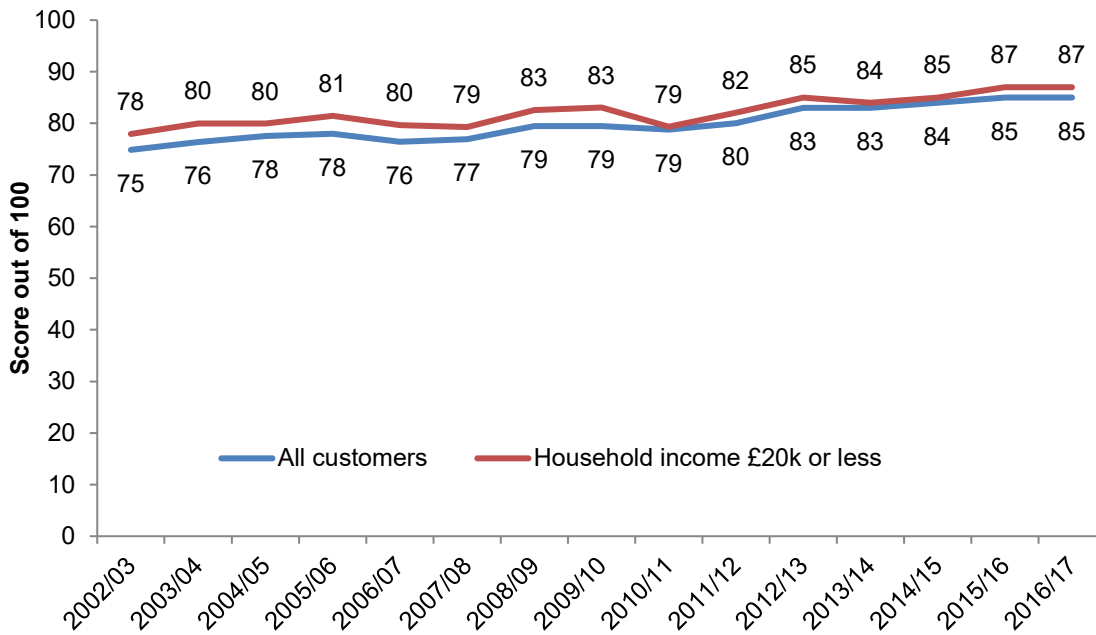
### Drivers of satisfaction for bus users [15]

All customers	Household income <£20k
Journey time	Journey time
Ease of making journey	Ease of making journey
Time waited to catch bus	Comfort inside the bus
Comfort inside the bus	Time waited to catch bus
Driver approachability and helpfulness	Stops and shelters - safety and security

### 9.16.3 Tube

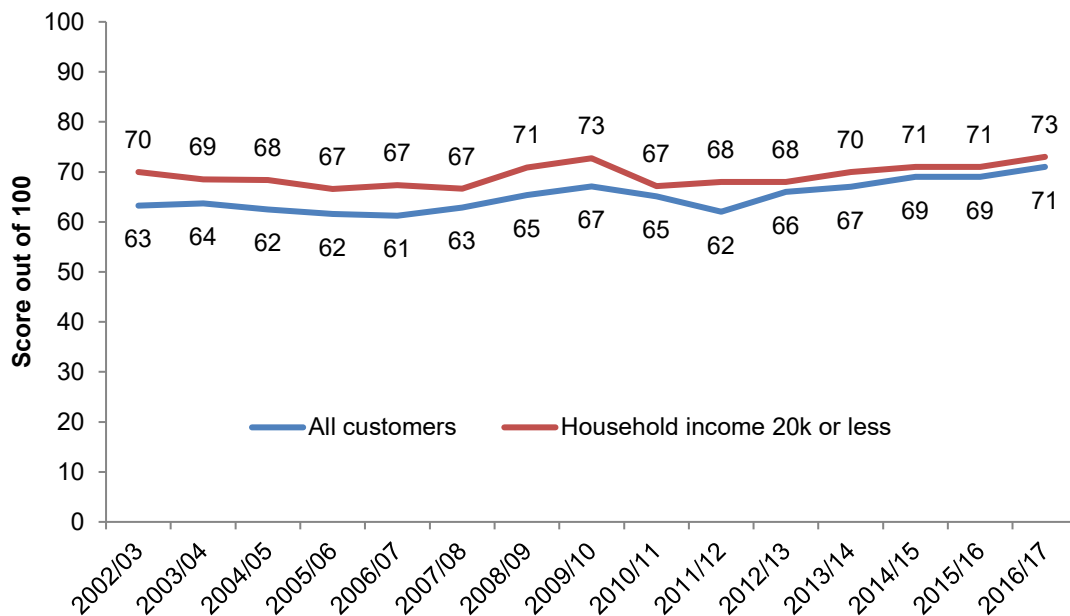
Among customers living in a low income household, overall satisfaction with the Tube is high and is slightly higher than the score provided by customers overall (87 out of 100 customers with an annual household income of £20,000 or less compared with 85 out of 100 for all customers) [15].

#### Overall satisfaction with the Tube over time [15]



Customers with a lower household income remain slightly more likely than all customers to be satisfied with the Tube offering value for money (73 out of 100 compared with 71 out of 100) [15].

### Satisfaction with value for money with the Tube over time [15]



### Drivers of satisfaction

Tube use among those on a low income is mainly driven by journey time, ease of making the journey and journey comfort. This is similar to the profile of all customers [15].

### Drivers of satisfaction for Tube users [15]

All customers	Household income <£20,000
Ease of making journey	Ease of making journey
Comfort of journey	Comfort of journey
Length of journey time	Length of journey time
Length of time waited for train	Smoothness of journey
Train crowding	Personal safety on train

### 9.16.4 Overground

Satisfaction with the Overground is high among customers living in a household with income of £20,000 or less and is very similar to customers overall (85 out of 100 compared with 84 out of 100 overall) [15].

#### Overall satisfaction with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	Household income £20,000 or less
<b>Base 2016/17</b>	<b>(13,209)</b>	<b>(2,407)</b>
2013/14	82	82
2014/15	83	83
2015/16	84	85
2016/17	84	85

Value for money stands at 75 out of 100 among Overground users living in a household with income of £20,000 or less, which is slightly higher than the score for all customers (73 out of 100) [15].

#### Satisfaction with value for money with London Overground over time – all customers [15]

Satisfaction score (0-100)	All	Household income £20,000 or less
<b>Base 2016/17</b>	<b>(12,491)</b>	<b>(2,369)</b>
2013/14	70	72
2014/15	73	75
2015/16	73	76
2016/17	73	75

#### Drivers of satisfaction

The condition of the train, feeling valued as a customer and ease of making journeys are important drivers for London Overground customers on lower incomes [15].

#### Drivers of satisfaction for Overground users [15]

All customers	Household income <£20,000
Ease of making your journey	Ease of making your journey
Feel valued as a customer	Condition and state of repair of the train
This train running on time	Feel valued as a customer
Information about service disruptions on the train	Information about service disruptions given at the station
Comfort of the train	The trains on this route generally running on time

### 9.16.5 Docklands Light Railway (DLR)

Overall satisfaction with the DLR is high among customers using the network at 89 out of 100, and it is slightly higher for those customers living in a household with £20,000 income or less (90 out of 100) [15].

Value for money stands at 81 out of 100 among DLR users who are living in a household with income of £20,000 or less, again this is slightly higher than the all customers score (79 out of 100) [15].

#### Drivers of satisfaction

Journey time, ease of making journeys and reliability of trains are the top drivers for DLR overall satisfaction among customers living in households with an annual income of less than £20,000. Ease of making the journey, comfort, journey length and reliability of trains are the main drivers for all customers [15].

#### Drivers of satisfaction for DLR users [15]

All customers	Household income <£20,000
Ease of making your journey	Reliability of trains
Comfort of the train	Ease of making journey
Reliability of trains	Length of journey time
Length of journey time	Feel valued as a customer
Ease of getting on the train	Comfort inside the train

### 9.16.6 Trams

Overall satisfaction with trams is very high among customers at 90 out of 100. This is slightly higher among customers living in a household with income of £20,000 or less (92 out of 100) [15].

#### Overall satisfaction with trams over time – all customers [15]

Satisfaction score (0-100)	All	Household income £20,000 or less
<b>Base 2016/17</b>	<b>(3,841)</b>	<b>(1,172)</b>
2013/14	89	91
2014/15	89	91
2015/16	90	91
2016/17	90	92

Overall satisfaction with value for money on the tram network is fairly high (82 out of 100) and it is in line with tram customers living in a household with income of £20,000 or less (81 out of 100) [15].



**Satisfaction with value for money with trams over time – all customers [15]**

Satisfaction score (0-100)	All	Household income £20,000 or less
<b>Base 2016/17</b>	<b>(2,415)</b>	<b>(624)</b>
2013/14	78	79
2014/15	78	78
2015/16	79	79
2016/17	82	81

**9.16.7 Streets**

Satisfaction ratings with the streets on walking and car journeys in London are similar among Londoners living in a DE household and all Londoners. For walking, DE Londoners gave a satisfaction rating of (71 out of 100 compared with 69 out of 100 among all Londoners. For their last car journey, DE car users' satisfaction rating was 66 out of 100, slightly higher than all car users' rating of 63 out of 100 [33].

**Overall satisfaction with streets and pavement after last journey over time – walking journey [33]**

Satisfaction score (0-100)	All	DE
<b>Base 2018</b>	<b>(951)</b>	<b>(77)</b>
2017	69	70
2018	69	71

**Overall satisfaction with streets and pavement after last journey over time - car journey [33]**

Satisfaction score (0-100)	All	DE
<b>Base 2018</b>	<b>(870)</b>	<b>(53)</b>
2017	63	63
2018	63	66

Satisfaction with cycling journeys not shown owing to small base size.

### 9.16.8 Transport for London Road Network (TLRN)

Satisfaction with the general impression of the TLRN is reasonable to fairly good. Customers with a lower household income (£20,000 or less) give a score of 69 out of 100 for walking, 75 out of 100 for travelling by bus, 70 out of 100 for driving, and 68 out of 100 for cycling on the TLRN [15].

Satisfaction score (0-100)	All	Household income £20,000 or less
<b>Walking</b>		
Base 2016-17	(3,432)	(1,043)
2013/14	70	72
2014/15	68	71
2015/16	68	70
2016/17	68	69
<b>Travelling by bus</b>		
Base 2016-17	(1,375)	(469)
2013/14	69	73
2014/15	71	72
2015/16	71	73
2016/17	72	75
<b>Driving</b>		
Base 2016-17	(2,286)	(583)
2013/14	67	69
2014/15	67	70
2015/16	70	72
2016/17	69	70
<b>Cycling</b>		
Base 2016-17	(1,048)	(274)
2013/14	69	*
2014/15	70	70
2015/16	64	66
2016/17	66	68

\*Denotes small base size (data not shown in this report for base sizes of less than 50).

## 9.17 Access to information

### 9.17.1 Access to the internet

People living in households with lower incomes are significantly less likely to access the internet 'on the move' or at work compared with all Londoners. Sixty-nine per cent of online DE Londoners go online 'on the move' compared with 81 per cent of all online Londoners. Online DE Londoners are even less likely to access the internet at work, just 37 per cent compared with 66 per cent [14].

#### Access to the internet (autumn 2017/spring 2018) [14]

%	All online Londoners	DE online Londoners
<b>Base</b>	<b>(2,062)</b>	<b>(351)</b>
Access at home	100	99
Access 'on the move'	81	69
Access at work	66	37

Reasons for internet use are broadly similar for online Londoners in DE households and all Londoners who access the internet. Although similar, the proportion of Londoners living in DE households who access the internet and undertake each internet activity is slightly lower than among all Londoners [14].

Main reasons for use include:

- Email (94 per cent online DE Londoners who access the internet compared with 96 per cent for online Londoners overall)
- Finding and sourcing information (87 per cent compared with 91 per cent overall)
- Buying goods and services (87 per cent compared with 90 per cent overall)
- Maps and directions (79 per cent compared with 90 per cent overall)
- Accessing live public transport information (69 per cent compared with 82 per cent overall)
- Banking (70 per cent compared with 82 per cent overall)
- Watching video content (78 per cent compared with 80 per cent overall)
- Day-to-day travel plans (50 per cent compared with 71 per cent overall) [14]

### 9.17.2 Device usage and behaviour

Smartphone ownership is lower among online DE Londoners than online Londoners overall (76 per cent compared with 84 per cent) [14].

#### Proportion of Londoners who use a smartphone (iPhone, Android, BlackBerry, other) (autumn 2017/spring 2018) [14]

%	All online Londoners	DE online Londoners
<b>Base</b>	<b>(2,062)</b>	<b>(351)</b>
Uses a smartphone	84	76

### 9.17.3 Use of the TfL website

Eighty-four per cent of online Londoners living in a DE household access the TfL website compared with 93 per cent of all online Londoners [14].

#### Frequency of visiting the TfL website (autumn 2017/spring 2018) [14]

%	All online Londoners	DE online Londoners
<b>Base</b>	<b>(2,062)</b>	<b>(351)</b>
<b>Uses TfL website</b>	93	84
Daily	40	28
3-4 times a week	17	13
3-4 times a month	16	15
Once a month	9	11
Less than once a month	10	18
Never	7	16

The most common reason for online Londoners in DE households to visit the TfL website is for journey planning. However, compared to all online Londoners, those living in DE households are significantly less likely to visit the site to use Journey Planner (61 per cent compared with 76 per cent) [14].

Online Londoners in DE households are also significantly less likely to use the TfL website for ticketing, budgeting and to find information about roads compared with all online Londoners [14].

### Reasons for visiting the TfL website (autumn 2017/spring 2018) [14]

%	All online Londoners	DE online Londoners
<b>Base (online Londoners)</b>	<b>(2,062)</b>	<b>(351)</b>
Journey planning	76	61
Ticketing (information and buying)	30	24
Viewing maps	29	24
Budgeting	19	13
Information about roads	12	8
Information about cycling	4	2

As respondents could select more than one answer, totals may equal more than 100 per cent.

#### 9.17.4 Accessing information in the event of travel disruption

A similar proportion of online Londoners living in DE households search for real-time information as all online Londoners (94 per cent compared with 96 per cent). The information sources most likely to be used by online DE Londoners are announcements/displays (51 per cent), staff (41 per cent) and the TfL website (39 per cent) [14].

## 10 Lesbian, gay and bisexual (LGB) Londoners

### Key findings

- Londoners who identify themselves as being lesbian, gay or bisexual account for 2.6 per cent of the population [12]
- Five per cent of people living in a couple in Inner London are in a same-sex relationship [2]
- LGB Londoners report a similar level of barriers to using public transport more frequently as all Londoners, with overcrowded services, cost of travel and service disruptions being the three most commonly mentioned factors [13]
- For some LGBT people, their fears about intimidation and/or abuse affect their travel behaviour [86]
- In this chapter we focus upon the experiences of LGBT people. Transgender Londoners are included in some of the research findings that we present
- We recognise that there may be barriers to transport faced by some transgender women and men. However, we do not yet have sufficient data to provide a detailed analysis

## 10.1 Summary – LGB Londoners

### 10.1.1 Profile of lesbian, gay and bisexual Londoners

London has a higher proportion of adults who identify as lesbian, gay or bisexual (LGB) than any other region of the UK. In London, 2.5 per cent of people consider themselves to be lesbian, gay or bisexual [12].

Across the whole of the UK, two per cent of people identify themselves as LGB. LGB people are slightly more likely to be men than women (58 per cent are men and 42 per cent women) and are more likely to be younger (2.6 per cent of 16 to 24-year-olds, compared with 0.6 per cent of 65-year-olds or older across the whole of the UK)<sup>11</sup> [12].

Londoners living in a couple are more likely to be in a same-sex relationship in inner London than outer London; five per cent of people living as a couple in inner London are in a same-sex relationship compared with 1.8 per cent in outer London boroughs [2].

### 10.1.2 Barriers

Very few differences exist between heterosexual and LGB Londoners regarding barriers to increased public transport use, and the general profile of barriers is consistent for both groups. The most common barriers to increased public transport use for LGB Londoners and heterosexual Londoners alike are overcrowded or cramped services, cost of travel and service disruptions [13].

However, LGB Londoners are significantly more likely than heterosexual Londoners to have experienced incidents of unwanted sexual behaviour or hate crime while travelling on the Capital's public transport network [13].

Fears of intimidation and/or abuse are sometimes mentioned by LGBT Londoners as barriers for increased public transport use. The extent to which these fears affect travel behaviour depends on people's personalities, previous experiences and the degree to which they perceive themselves as being visibly LGBT [86].

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<sup>11</sup> Around five per cent of people interviewed did not give a response to this question.

## 10.2 Introduction

London is home to the largest LGB population in the UK, at 2.6 per cent. London's LGB population is diverse, although it has a younger age profile than the wider population of London [12].

Surveys rarely collect and analyse data by sexual orientation. Therefore the data in this chapter is predominantly derived from the ONS Integrated Household Survey and our own research into safety and security while travelling in London.

The differences highlighted between groups of individuals in this chapter may well be influenced by a number of factors other than sexual orientation, with age, gender, income and education all affecting perceptions towards travel in London.

## 10.3 Profile of LGB Londoners

People who identify themselves as LGB total 2.6 per cent of London's population. This is higher than the UK average; two per cent of people across the country as a whole identify themselves as LGB. In London, 4.1 per cent of people declined to reveal their sexual identity as part of the ONS survey or said they did not know, 0.5 per cent responded by selecting 'other', and the remaining 89 per cent said heterosexual [12].

### Sexual identity in London and the UK (Jan–Dec 2014) [12]

%	London	UK
Heterosexual	89	93.4
Lesbian/gay/bisexual	2.6	2
Other	0.3	0.5
Don't know/refusal/non-response	8.1	4.1

Base: UK: 168,221, London: 14,027.

Measuring the proportion of LGB people in the population is challenging as some people do not define themselves with a sexual identity and many people consider this to be a private topic. The ONS asks questions focused on sexual identity (how people perceive themselves) as opposed to sexual attraction, behaviour and/or orientation<sup>12</sup>.

Other sources quote higher proportions. These higher reported proportions of LGB Londoners may also reflect the use of definitions broader than 'sexual identity'. According to our research, conducted in 2017/2018, 8.6 per cent of Londoners are LGB [13]. This is substantially higher compared to the proportion identifying themselves as LGB in the ONS survey. This difference can potentially be attributed to the different methodologies used to collect this information: this survey is

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<sup>12</sup> Those completing the survey face-to-face are asked: 'Which of the options on this card best describes how you think of yourself?' Those completing the telephone survey are asked: 'I will now read out a list of terms people sometimes use to describe how they think of themselves...as I read the list again please say 'yes' when you hear the option that best describes how you think of yourself.'



administered online and the ONS data is gathered via face-to-face and telephone interviews. We have traditionally found that respondents are more likely to give 'honest' answers during an online survey where their anonymity is protected particularly when answering more sensitive questions. Conversely, with interviewer-led questioning via face-to-face and telephone surveys, respondents can feel somewhat pressured to give responses that would be deemed to be more 'socially acceptable'.

Stonewall states in its 'Introduction to supporting LGBT young people: A guide for schools' that:

'The Government estimates that six per cent of the UK population, around 3.9 million people, identify as lesbian, gay or bisexual.' [87].

At the time of the 2011 Census, 2.9 per cent of people living in a couple in London were in a same-sex relationship; across the UK as a whole the figure is 1.5 per cent. The proportion of same-sex couples varies considerably across the Capital, with couples living in inner London boroughs most likely to be in a same-sex relationship; five per cent of inner Londoners living in a couple were in a same-sex relationship compared with 1.8 per cent of outer Londoners [2].

The boroughs with the highest proportion of couples living in a same-sex relationship are the City of London (8.6 per cent), Southwark (seven per cent), Lambeth (6.8 per cent) and Islington (6.2 per cent) [2].

London is also home to the largest proportion of civil partnerships in England and Wales; 37 per cent of civil partnerships formed in 2016 were in the Capital [89].

LGB people are slightly more likely to be men than women (58 per cent are men and 42 per cent women across the whole of the UK) and more likely to be younger (2.6 per cent of 16 to 24-year-olds, compared with 0.6 per cent of 65 year olds or older across the whole of the UK)<sup>13</sup> [12].

Research by ONS in 2010 shows that people identifying themselves as LGB within the UK are slightly more likely to be white than heterosexual people (93 per cent of LGB people are white compared to 91 per cent of heterosexual people). This finding should be interpreted with caution when extrapolating to London, since the proportion of Londoners who are from a BAME group is higher than for the UK as a whole [88].

LGB people are also more likely to be in managerial and professional occupations (42 per cent) compared to heterosexual people (31 per cent) [88].

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<sup>13</sup> Around five per cent of people interviewed did not give a response to this question.

It is important to note that people from different backgrounds and occupations have varying levels of openness about identifying themselves as LGB in surveys, and so caution needs to be applied when interpreting these results.

### Demographic profile according to sexual identity (2009/10) (UK) [88]

%	Heterosexual	LGB
<b>Base</b>	(225,819)	(3,574)
<b>Gender</b>		
Men	49	55*
Women	51	45*
<b>Age</b>		
16-24	15	18
25-44	34	47
45-64	32	27
65+	20	8
<b>Ethnicity</b>		
White	91	94
BAME	9	7
<b>Social grade</b>		
Managerial and professional occupations	31	42
Intermediate occupations	16	15
Routine and manual occupations	29	23
Never worked and long-term unemployed	6	5
Not classified	18	15

\*More recent research has been carried out into sexual identity by ONS, but the 2010 data release provides the greatest profiling information. The most recent ONS Household survey data on sexual identity shows 58 per cent of LGB people to be men and 42 per cent women.

#### 10.3.1 Barriers

We have carried out several research programmes to investigate the barriers that Londoners face when using public transport and their findings are in general agreement. However, the issue is complex and the specific questions that we ask of Londoners may influence the response. The impact of specific barriers may also be much more significant for some Londoners than others.

There is very little difference between the barriers identified by LGB and all Londoners. The most common barrier to increased public transport use, mentioned by 52 per cent of LGB Londoners, is overcrowded or cramped services. This is similar to the proportion of heterosexual Londoners who consider overcrowding to be a barrier (48 per cent). Cost of travel and service disruptions are also mentioned as barriers to public transport use by LGB and

heterosexual Londoners (41 per cent of LGB Londoners and 41 per cent of heterosexual Londoners mention cost of travel and 31 per cent of LGB Londoners and 31 per cent of heterosexual Londoners mention disruptions to services) [13].

### Barriers to using public transport more frequently (2017/18) [13]

%	All Londoners	Hetero-sexual Londoners	LGB Londoners
<b>Base</b>	<b>(6,167)</b>	<b>(5,365)</b>	<b>(498)</b>
Overcrowding/cramped conditions	48	48	52
Cost of travel	41	41	41
Disruptions to the service	31	31	31
Slow journey times	28	28	29
Passengers pushing and shoving each other	26	26	30
Unreliable services	24	24	24
Strikes	23	23	22
Schoolchildren/youths behaving badly	21	21	24
Drunken passengers/being aggressive/intimidation	21	21	22
Dirty environment on the bus/train	20	19	21
Frequency of the services	19	19	20
Concern about terrorist attacks	18	18	15
Concern about being a victim of crime on the bus/Tube/train (robbery, assault or pickpocketing)	14	14	12
Concern about being a victim of crime getting to and waiting for the bus/ Tube/train (robbery, assault or pickpocketing)	14	14	15
Dirty environment getting to the bus/ train	14	14	14

As respondents could select more than one answer, totals may equal more than 100 per cent.

## 10.4 Safety and security

LGB Londoners are slightly less likely than heterosexual Londoners to say that they are worried (either 'quite worried' or 'very worried') about their personal security (ie being safe from crime or antisocial behaviour) while using public transport in London: 26 per cent of LGB Londoners are worried about their personal security when using public transport compared with 31 per cent of heterosexual Londoners [13].

## Levels of concern about personal security when using public transport in London (2017/18) [13]

%	All Londoners	Heterosexual Londoners	LGB Londoners
<b>Base</b>	<b>(6,167)</b>	<b>(5,365)</b>	<b>(498)</b>
Not at all worried	21	21	23
A little bit worried	44	44	45
Quite a bit worried	24	24	21
Very worried	6	6	5
NET: Worried	30	31	26
Don't know	5	5	5

Experience of worrying incidents on public transport in the past three months is almost identical among LGB Londoners and heterosexual Londoners. Thirty-three per cent of LGB Londoners said they had experienced a specific incident of worry in the past three months, compared with 32 per cent of heterosexual Londoners [13].

The causes are broadly similar among LGB Londoners and heterosexual Londoners who experienced such events. However, a significantly greater proportion of LGB Londoners said that they felt worried owing to unwanted sexual behaviour (13 per cent of LGB Londoners mentioned this compared with eight per cent of heterosexual Londoners) and owing to passengers drinking alcohol (cited by 27 per cent of LGB Londoners and 20 per cent of heterosexual Londoners) [13].

Among those who experienced a worrying event, a similar proportion of LGB Londoners and heterosexual Londoners took immediate action as a result. Forty-three per cent of LGB Londoners took immediate action after the worrying incident, as did 46 per cent of heterosexual Londoners. This tended to be either a change to another form of transport (23 per cent of LGB Londoners and 29 per cent of heterosexual Londoners) or they stopped making the journey altogether (20 per cent of LGB Londoners and 17 per cent of heterosexual Londoners) [13].

The longer-term impact of worrying incidents is also similar among LGB Londoners and heterosexual Londoners. Twenty per cent of LGB Londoners said they stopped travelling on the form of transport on which they experienced the worrying incident either temporarily (15 per cent) or completely (four per cent). This is just slightly higher than the 15 per cent of heterosexual Londoners who were put off travelling by that particular mode either temporarily (12 per cent) or completely (four per cent) [13].

### 10.5 Unwanted sexual behaviour

LGB Londoners are significantly more likely than heterosexual Londoners to have experienced unwanted sexual behaviour while using public transport in the Capital. Sixteen per cent of LGB Londoners said they had personally experienced unwanted sexual behaviour compared with 10 per cent of

heterosexual Londoners. The mean number of incidents experienced in the past three months is largely similar among LGB Londoners (three incidents on average) and heterosexual Londoners (2.6 incidents on average) [13].

### Experience of unwanted sexual behaviour when using public transport in past 12 months (2017/18) [13]

%	All Londoners	Heterosexual Londoners	LGB Londoners
<b>Base</b>	<b>(6,167)</b>	<b>(5,365)</b>	<b>(498)</b>
Yes	10	10	16
No	87	88	82
Would rather not say	3	3	2

While the types of unwanted sexual behaviour experienced are largely similar among LGB Londoners and heterosexual Londoners, there are some distinct differences. Significantly greater proportions of LGB Londoners than heterosexual Londoners were subjected to sexual comments (45 per cent compared with 34 per cent) or sexual gestures (29 per cent compared with 19 per cent) [13].

The majority of those who experienced unwanted sexual behaviour did not report the incident to anyone. Seventy-two per cent of LGB Londoners who experienced unwanted sexual behaviour in the past year did not report it, compared with 67 per cent of heterosexual Londoners. LGB Londoners were significantly more likely than heterosexual Londoners to not report the incident because they felt 'nobody would care' (49 per cent compared with 34 per cent) [13].

## 10.6 Hate crime

LGB Londoners are significantly more likely than heterosexual Londoners to have experienced hate crime targeted at themselves or witnessed it targeted at others in the past year (30 per cent compared with 21 per cent) [13].

### Experience of hate crime when using public transport in past 12 months (2017/18) [13]

%	All Londoners	Heterosexual Londoners	LGB Londoners
<b>Base</b>	<b>(6,167)</b>	<b>(5,365)</b>	<b>(498)</b>
NET: Yes	22	21	30
Yes, targeted at me	7	6	10
Yes, targeted at someone else/ others	16	16	22
No	74	76	67
Would rather not say	4	4	3

The type of behaviours experienced or witnessed were mostly similar among LGB Londoners and heterosexual Londoners, with the most common being verbal insults

(mentioned by 77 per cent of LGB Londoners and 70 per cent of heterosexual Londoners), physical intimidation (32 per cent of LGB Londoners and 35 per cent of heterosexual Londoners) and spitting (mentioned by 16 per cent of both groups) [13].

There are some clear distinctions between LGB Londoners and heterosexual Londoners in the perceived motivation for incidents of hate crime experienced or witnessed on public transport in the past 12 months. LGB Londoners were more than four times likely than heterosexual Londoners to cite sexual orientation as the perceived motivation for the incident (41 per cent compared with nine per cent) [13].

As with incidents of unwanted sexual behaviour, most instances of hate crime tend to go unreported. Around three-quarters of those experiencing or witnessing hate crime did not report the incident to anyone (75 per cent of LGB Londoners and 73 per cent of heterosexual Londoners) [13].

We conducted a review of social media content looking specifically at instances of discrimination experienced or witnessed on the public transport network. Our research showed that LGBT Londoners face incidents of discrimination on the Capital's public transport network and talk about incidents to some extent on social media, with experiences of discrimination typically being of an explicit nature in the form of verbal abuse. For incidents involving LGBT Londoners, the discriminators were generally other customers or members of staff (including private hire drivers) [32].

From our research that investigates the travel barriers faced by LGBT people, fear of intimidation and/or abuse emerged as a potential barrier. Modifications to travel behaviour as a result of such fears are thought to depend on many factors, including people's personalities, previous experiences and the degree to which they perceive themselves as visibly LGBT [86].

For some, particularly disabled LGBT people, hate crime is a particular concern, as are the difficulties experienced when reporting it. However, we are not aware of any research findings that are available on this topic related to transport in London.

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## 12 Glossary

<b>16+ Oyster photocard</b>	Entitles those aged 16-18 to reduced travel fares
<b>18+ Student Oyster photocard</b>	Entitles those aged 18+ and in full-time education to a 30 per cent reduction in various ticket costs
<b>Accompanied journeys</b>	Journeys made for the purposes of market research where a respondent and interviewer travel together
<b>Bus Pass</b>	A ticket valid for a specified time giving unlimited travel on London bus services
<b>Congestion Charge</b>	A pricing system which charges drivers for entering a defined zone within specific time periods, aimed to reduce traffic congestion
<b>Cycle Hire</b>	A public bicycle sharing scheme launched in London in 2011
<b>Cycleways</b>	Cycle routes that run between central London and Outer London
<b>Deprivation</b>	Is calculated by combining a number of indicators (which cover economic, social, environmental, housing, crime, education and health issues) to give an understanding of quality of life
<b>DE social grade</b>	Refers to households where the chief income earner works in a semi/unskilled manual profession, is a casual worker or is unemployed with state benefits.
<b>Dial-a-Ride</b>	A door-to-door transport service for disabled people who are unable (or almost unable) to use public transport services
<b>Disabled person's Freedom Pass</b>	A Freedom Pass specifically for disabled people
<b>Docklands Light Railway (DLR)</b>	A light rail system in London
<b>Door-to-door service</b>	Provide disabled people with transport from the exact journey origin to the exact destination
<b>Ethnicity: Asian</b>	Includes Asian Indian, Asian Pakistani, Asian Bangladeshi and Asian other
<b>Ethnicity: BAME (black, Asian and minority ethnic)</b>	Includes black Caribbean, black African, black other, Asian Indian, Asian Pakistani, Asian Bangladeshi, Asian other, mixed white and black Caribbean, mixed white and black African, mixed white and Asian, mixed other, Chinese and other ethnic groups

<b>Ethnicity: Black</b>	Includes black Caribbean, black African and black other
<b>Ethnicity: Mixed</b>	Includes mixed white and black Caribbean, mixed white and black African, mixed white and Asian and mixed other
<b>Ethnicity: Other</b>	Includes Arab and other ethnic groups
<b>Ethnicity: White</b>	Includes white British, white Irish and white other
<b>Freedom Pass</b>	Concessionary pass issued free by local authorities to London residents who meet an age criterion and to disabled people, which gives unlimited travel within Greater London by National Rail, DLR, London Trams, buses and Underground
<b>Full car driving licence</b>	A licence which permits the holder to drive cars (excludes provisional driving licence)
<b>Journey Planner</b>	TfL's electronic search engine that allows users to plan their journeys in advance of making them
<b>Journey purpose</b>	The reason for travelling
<b>Journey purpose: Education</b>	Travel as a pupil or student to or from school, college or university. Or travel to accompany a child to or from school
<b>Journey purpose: Leisure</b>	Travel to or from entertainment, sport or social activities
<b>Journey purpose: Other</b>	All travel purposes not otherwise classified, including accompanying or meeting another person, and travelling to or from a place of worship
<b>Journey purpose: Other work-related</b>	Travel in the course of work, or to a location that is not the traveller's usual workplace
<b>Journey purpose: Shopping and personal business</b>	Travel for shopping and use of services such as hairdressers, dry-cleaners, doctors, dentists, banks, solicitors etc
<b>Journey purpose: Usual workplace</b>	Travel to or from the traveller's usual place of work
<b>LGB (Lesbian, gay and bisexual)</b>	Describes lesbian, gay and bisexual people

<b>35LGBT (Lesbian, gay, bisexual and transgender)</b>	Describes lesbian, gay, bisexual and transgender people
<b>London taxi/black cab</b>	Taxis available in London of the distinctive Hackney carriage style. These taxis are available to flag down on the street
<b>Londoners</b>	People who live in one of the London boroughs
<b>LTDS (London Travel Demand Survey)</b>	A major customer research project by TfL exploring Londoners' travel patterns
<b>Older person's Freedom Pass</b>	A Freedom Pass specifically for those meeting an age criteria
<b>Oyster card</b>	A 'smartcard' that can be used as a season ticket (eg for bus passes and Travelcards) or to pay for travel on a 'pay as you go' basis using credit held on the card
<b>Oyster pay as you go</b>	Oyster cards can hold electronic funds of money. With each use, this fund decreases until the user loads more money on to their card
<b>Priority seating</b>	Seats available on public transport for those less able to stand
<b>Public transport</b>	Any of the following transport modes: bus, tram, London Underground, DLR, London Overground, rail, taxis and minicabs
<b>Senior/Disabled Persons Railcard</b>	Senior Railcard entitles those aged 60 and over to a third off rail travel across Britain. The Disabled Persons Railcard offers a third off rail travel across Britain for disabled people
<b>Safer Travel at Night</b>	An initiative to reduce the use of illegal (unbooked) minicabs in London, specifically targeted at women aged 16-34
<b>Taxi/minicab (PHV: private hire vehicle)</b>	Other forms of taxi which are not London taxis/black cabs. These taxis should be booked in advance
<b>Taxicard</b>	Provides subsidised door-to-door transport in taxis and private hire vehicles for disabled people
<b>Travelcard</b>	A ticket valid for unlimited travel on National Rail, buses, DLR, London Trams and Underground, subject to certain conditions within specific fare zones and for a specified time period
<b>Trip</b>	A complete door-to-door movement by an individual to achieve a specific purpose (eg to go from home to work)

<b>Trip-chaining</b>	Journeys which have separate stages for consecutive purposes. Taking a child to school and then completing personal business is an example of trip-chaining
<b>Trip rate</b>	The number of trips made per person per day
<b>Under 16 Oyster photocard</b>	Entitles children under the age of 16 to free travel on buses and trams, and reduced travel on the Tube, DLR, Overground and some National Rail services
<b>Working full-time</b>	People in paid employment normally working for more than 30 hours a week
<b>Working part-time</b>	People in paid employment working for not more than 30 hours a week
<b>Young Person's Railcard (16-25 Railcard)</b>	Entitles those aged 16-25 to a third off rail travel across Britain
<b>Zip card</b>	Refers to Oyster photocard which entitle young people to travel at a free or discounted rate

## 13 Appendix A: Equality groups in London boroughs

The data tables on the following pages give the proportion of equality groups in each London borough. The proportion of BAME, women, older, younger, disabled people and Londoners with low incomes are listed in order of highest proportion.

Proportion of BAME residents in each London borough [2]

<b>Borough</b>	<b>%</b>
Newham	71
Brent	64
Harrow	58
Redbridge	57
Tower Hamlets	55
Ealing	51
Hounslow	49
Waltham Forest	48
Southwark	46
Lewisham	46
Hackney	45
Croydon	45
Lambeth	43
Barking and Dagenham	42
Haringey	39
Enfield	39
Hillingdon	39
Westminster	38
Greenwich	38
Barnet	36
Merton	35
Camden	34
Islington	32
Hammersmith and Fulham	32
Kensington and Chelsea	29
Wandsworth	29
Kingston upon Thames	26
City of London	21
Sutton	21
Bexley	18
Bromley	16
Richmond upon Thames	14
Havering	12

[Type here]

Proportion of women residents in each London borough [2]

<b>Borough</b>	<b>%</b>
Bromley	52
Bexley	52
Havering	52
Enfield	52
Wandsworth	52
Barking and Dagenham	52
Barnet	52
Croydon	52
Sutton	51
Hammersmith and Fulham	51
Richmond upon Thames	51
Kingston upon Thames	51
Lewisham	51
Camden	51
Islington	51
Kensington and Chelsea	51
Merton	51
Harrow	51
Haringey	51
Southwark	51
Redbridge	51
Hackney	50
Greenwich	50
Hillingdon	50
Lambeth	50
Waltham Forest	50
Ealing	50
Hounslow	50
Brent	50
Westminster	49
Tower Hamlets	48
Newham	48
City of London	45

[Type here]

Proportion of older residents in each London borough [2]

<b>Borough</b>	<b>%</b>
Havering	18
Bromley	17
Bexley	16
Harrow	14
Sutton	14
City of London	14
Richmond upon Thames	14
Barnet	13
Kingston upon Thames	13
Hillingdon	13
Croydon	12
Enfield	12
Redbridge	12
Merton	12
Kensington and Chelsea	12
Westminster	11
Ealing	11
Hounslow	11
Camden	11
Brent	10
Barking and Dagenham	10
Greenwich	10
Waltham Forest	10
Hammersmith and Fulham	9
Islington	9
Lewisham	9
Haringey	9
Wandsworth	9
Southwark	8
Lambeth	8
Hackney	7
Newham	7
Tower Hamlets	6



[Type here]

Proportion of younger residents in each London borough [2]

<b>Borough</b>	<b>%</b>
Newham	39
Barking and Dagenham	38
Tower Hamlets	37
Enfield	35
Greenwich	35
Hackney	34
Hillingdon	34
Waltham Forest	34
Redbridge	34
Lewisham	33
Croydon	33
Brent	33
Haringey	32
Hounslow	32
Barnet	32
Bexley	32
Southwark	32
Harrow	32
Ealing	32
Kingston upon Thames	32
Lambeth	31
Camden	31
Sutton	30
Havering	30
Merton	30
Islington	30
Hammersmith and Fulham	29
Bromley	29
Richmond upon Thames	28
Wandsworth	28
Westminster	27
Kensington and Chelsea	26
City of London	18

[Type here]

Proportion of disabled residents in each London borough [2]

<b>Borough</b>	<b>%</b>
City of London	17
Havering	17
Barking and Dagenham	16
Islington	16
Bexley	16
Redbridge	15
Enfield	15
Waltham Forest	15
Greenwich	15
Harrow	15
Bromley	15
Croydon	15
Newham	14
Tower Hamlets	14
Hackney	14
Westminster	14
Barnet	14
Camden	14
Haringey	14
Brent	14
Hillingdon	14
Lewisham	14
Southwark	14
Sutton	14
Ealing	14
Hounslow	14
Lambeth	13
Hammersmith and Fulham	13
Merton	13
Kingston upon Thames	12
Kensington and Chelsea	12
Wandsworth	11
Richmond upon Thames	11

[Type here]

Proportion of residents on lower income in each London borough [11]

<b>Borough</b>	<b>%%%</b>
Brent	59
Harrow	57
Tower Hamlets	55
Islington	44
Barking and Dagenham	43
Hackney	42
Haringey	42
Southwark	40
Lambeth	39
Camden	39
Lewisham	37
Enfield	37
Newham	37
Waltham Forest	37
Greenwich	35
Hammersmith and Fulham	35
Bexley	34
Westminster	34
Croydon	33
Barnet	33
City of London	32
Ealing	32
Hillingdon	31
Kensington and Chelsea	31
Redbridge	31
Havering	30
Sutton	28
Hounslow	26
Bromley	26
Wandsworth	25
Merton	25
Kingston upon Thames	23
Richmond upon Thames	23