

Silvertown Tunnel Socio-Economic Monitoring: Year -2



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Silvertown Tunnel Socio-Economic Monitoring: Year -2

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Executive Summary

Overview

This report has been developed by Steer in collaboration with lead consultant Arcadis, and with fieldwork partner Qa Research, working on behalf of Transport for London (TfL).

The document summarises the results from the second year of the socio-economic monitoring of the Silvertown Tunnel - the first report was delivered in 2021. In the long term, the research aims to identify socio-economic changes within a specified study area likely to be impacted by the tunnel, and where possible determine what changes are attributable to the new tunnel.

In total, the socio-economic monitoring encompasses six waves. Three waves are planned to be completed prior to the Silvertown Tunnel opening - wave one (baseline) in 2021, wave two in 2023 and the third wave is scheduled for autumn 2024. There are also three waves of data collection planned after the tunnel is opened in order to continue monitoring the impact of the tunnel on socio-economic changes in the study area.

The research comprises surveys with residents and businesses, as well as secondary data analysis to reflect on social and economic conditions in the period before the tunnel opens. The baseline reports based on the data collection prior to the tunnel opening provide the context for evaluating its impact.

The results summarised below amalgamate key observations from both secondary data analysis and the 2023 resident and business surveys. The 2023 surveys provide a picture of travel behaviour for businesses and residents in the proximity of the Silvertown Tunnel, and also highlight key issues. The results have been compared with the 2021 findings and pertinent changes between the waves reported.

Key observations

Personal and Business Travel

- Secondary data sources show that there are areas within the study area with low public transport accessibility, particularly to the north, east and southeast of the area. However, there have been some improvements in public transport frequency and capacity, such as the Elizabeth line which have resulted in increased accessibility in some areas.
- Average daily total trips made by residents in the study area are slightly lower and the active travel (walking and cycling) and public transport shares higher in the study area than in Greater London. This is likely to be related to lower than average car or van ownership.
- Cross-river commutes are clearly dominated by south-north movements, with many more residents from south of the River Thames crossing the river to work than in the

opposite direction. This is due to the location of significant employment areas (City of London, Westminster, Canary Wharf and Stratford).

- Cross-river commutes tend to originate in areas around stations of the Jubilee Line and Docklands Light Railway (DLR), which provide connectivity with the main employment areas.

Businesses

The study area of East and Southeast London has a higher proportion of businesses in the Transport, Retail and Distribution (TRAD) sector and a lower proportion in private services than in the comparator areas (West and Greater London). There are also fewer large businesses as a proportion of the total.

Business floorspace has remained constant in the last ten years (to 2020), though the industrial share has declined, while retail, office, and other business floorspace has grown.

Most businesses surveyed are small (fewer than 10 employees), though reflect the profile of businesses by sector.

The majority of businesses have some significant travel to/from their site:

- Two thirds of businesses reported receiving customer/ client visitors in both wave one and two
- Over half (57%) of businesses made business trips in the second wave - a six-point drop since 2021
- Three quarters accept deliveries – this is similar to the 2021 figure
- Two thirds are making deliveries from their site – slightly more than in wave one

The car remains important for customer and business trips. Three in five businesses said trips are made from their site by car, which was slightly lower than wave one. Over four-fifths of businesses said cars are used by visitors/ customers to their site in wave one and two.

Congestion and parking remain the main issues impacting deliveries in wave two, albeit cited by fewer businesses than in 2021. Half of businesses feel predictability of journey times for road traffic at the Blackwall Tunnel is poor or very poor, a slight increase compared to 2021.

The Blackwall Tunnel was seen by respondents as the most important river crossing in southeast/ east London.

Over half of businesses (58%) say that the number or capacity of river crossings constrains operations or viability of business at this site, a small increase compared to 2021.

Similarly to wave one, businesses think the ease of access by customers/ clients and ease of access to markets are very important. Many are based where they are for proximity to customers/ clients and access by road.

Residents

The population of the study area in 2019 was 1.4 million and, due to lack of updated estimates from the ONS for the MSOA level, a similar figure from 2020 has been assumed for the second wave of surveys. Compared to 2019 and based on the mid-year

population estimates, population density is higher in most parts of Tower Hamlets, central Newham and some parts of the north of Southwark and around Woolwich.

In addition, growth of this population over the previous five- and ten-year periods was greater than in the comparator areas of West London and Greater London. The largest increases have been seen in new brownfield developments such as Stratford/ Olympic Park, North Greenwich, Canning Town, Silvertown and Beckton.

The population is relatively younger than the average in the comparator areas, with larger shares in the 20-40 age bands, and relatively fewer in the older age groups.

Unemployment (claimant count) is higher in the study area than in the comparator areas.

The study area also has a considerable population living in areas with high levels of deprivation (lower Index of Multiple Deprivation deciles) when compared to England or Greater London as a whole.

Household income for the study area is below the average for Greater and West London. However, there are parts of the area which have much higher average incomes, such as Greenwich/ Blackheath, Wanstead, Isle of Dogs, Rotherhithe, and Wapping. Homes are also more affordable (based on a ratio of income to house prices) than the comparator areas.

Slightly more residents (38%) cross the Thames at least once a week than in 2021 (33%). Commuting has remained the most frequent travel purpose among respondents overall and among those taking cross-river trips. More residents cited business travel as their regular cross-river journey purpose than in 2021.

Respondents from higher social grades (ABC1) are more likely to cross the river at least once a week than those in lower social grades (C2DE).

Consistent with 2021, public transport accounts for the largest shares of 'regular' (once a week or more) cross-river trips, followed by car. Walking and cycling shares are very small across all purposes.

Similarly to wave one, the majority of outbound trips are before 9am. For car trips the peak is before 8am. The public transport outbound peak is slightly later, between 7 and 9am.

The main reason for not making cross-river trips remains the lack of a need to reach destinations in east/ southeast London (cited by 85% in 2021 and slightly more in 2023). In part, this may be conditioned by the relative lack of options for cross river travel.

However, more respondents perceived crossing the river to be easy, in particular those living in Greenwich or Southwark, compared to the share who found it not easy.

Congestion, taking too long to reach a crossing, and not having a convenient crossing remain the main reasons it is perceived as not being easy. In addition, a lack of convenient local crossings is cited by more residents (a third) in 2023.

Of those who make a regular cross-river journey, twice as many residents (10%), changed the main mode they use for it compared to 2021, but only 5% have changed the crossing they use. In addition, more people (14%) had changed their journey time to an earlier or later departure compared to 2021 (4% and 7% respectively). As with 2021, there may still be an element of 'returning to normal' post-pandemic travel patterns.

Awareness and Benefit of the Silvertown Tunnel

Two-thirds of business respondents are aware of the Silvertown Tunnel and so are half of residents which is a significant increase from 2021. Businesses have articulated a real need for the new tunnel, while for residents this need is not articulated so strongly. Current travel patterns in the area are likely to reflect the 'status quo' in terms of river crossings.

Similarly to wave one, the majority of businesses use river crossings to the east/southeast of London regularly, whether that is business trips, deliveries in or out or receiving customers/ visitors.

Consistent with 2021, a minority of residents make regular cross-Thames trips. Commuting remains the most mentioned regular crossing purpose among residents.

For businesses, car remains the dominant mode used for cross-river trips, while public transport remains the most commonly used method among residents for most trip types.

Consistent with wave one, the most mentioned drawback of a business's location remains congestion. It also remains a prime cause of problems with deliveries to their site.

Congestion is the main reason why residents do not cross the river (more often) and is also the main reason why they have changed their main river crossing to other alternatives, as well as switched from using car to public transport links. In 2021, it was coronavirus that was most common cause for changes to the main river crossing and mode used.

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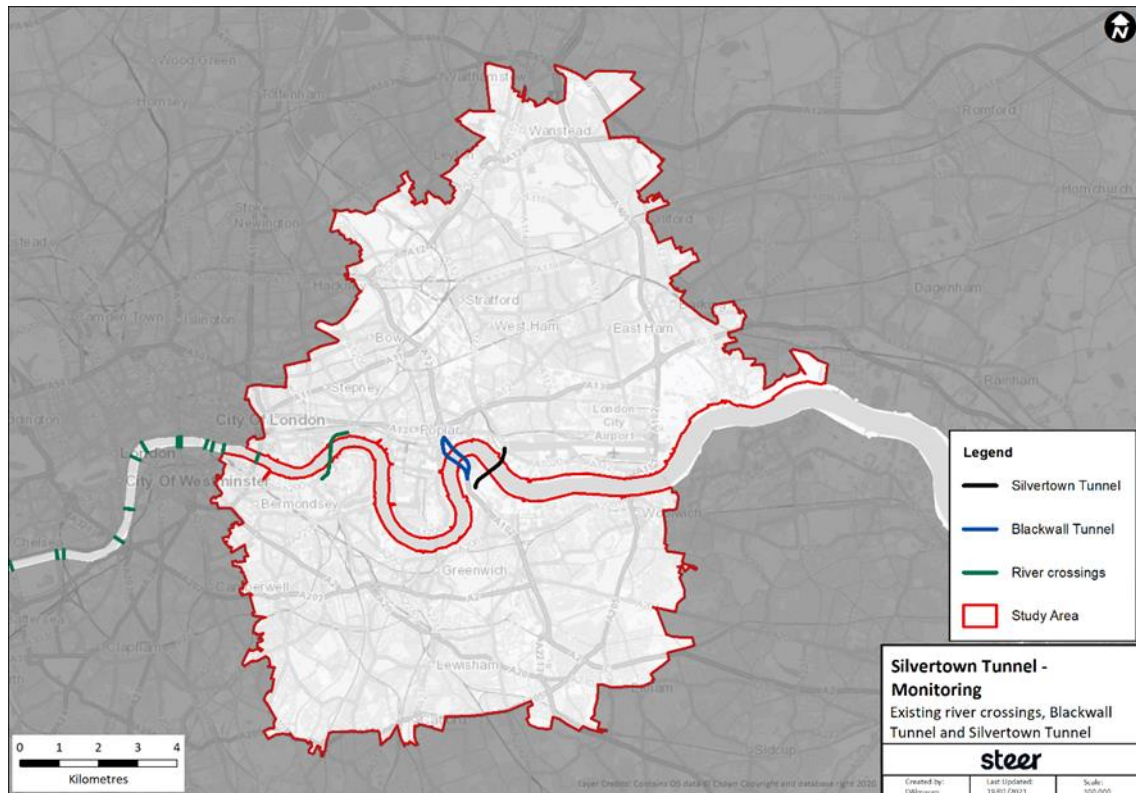
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1 Introduction

Silvertown Tunnel

- 1.1 The Silvertown Tunnel will connect the Greenwich peninsula with Silvertown, providing additional river crossing capacity for private motor vehicles and bus services approximately half a kilometre downstream of the existing Blackwall Tunnel. The 1.4km link is sponsored by Transport for London (TfL) and will be designed, built and operated by the Riverlinx consortium. A Development Consent Order (DCO) was granted in May 2018 and the tunnel is due to open in 2025.
- 1.2 When open, both the Silvertown Tunnel and the Blackwall Tunnel will have a road user charge to help manage traffic and associated emissions. The Silvertown Tunnel will enable zero-emission double decker bus services to cross the river in this area. Today height restrictions mean only single-decker buses can use the Blackwall Tunnel. Figure 0.1 shows the location of Blackwall Tunnel and other existing Thames river crossings, as well as the location of Silvertown Tunnel. There is also a free ferry service which carries cars between Woolwich and north Woolwich in the east of the Study Area.

Figure 0.1: London river crossings



Socio-economic impact monitoring

- 1.3 Steer and Arcadis have been appointed by TfL to monitor the socio-economic impacts of the Silvertown Tunnel. Monitoring the socio-economic impacts of the tunnel is a requirement of the DCO for the scheme. Socio-economic impact monitoring will track changes in the social and economic characteristics of the population in the tunnel's area of influence, and identify as far as possible the influence of the tunnel on changes in these characteristics, against the wider backdrop of social and economic change in London. Socio-economic characteristics include levels of deprivation, household income, the number of businesses and jobs, and the age, number, and density of the population. The monitoring will draw on existing datasets and will collect survey data from residents and businesses about the journeys they make before and after tunnel opening and seek to explore how the tunnel and new charging regime changes access to work, learning, retail, and leisure opportunities.
- 1.4 Monitoring will be undertaken three times prior to tunnel opening and annually for three years from tunnel opening. This will involve six waves of primary data collection and six analyses of the secondary data sources. The first wave of primary data collection took place in autumn 2021, the second wave was repeated in autumn 2023 and its findings along with the secondary data analysis, are presented in this report.
- 1.5 Monitoring the socio-economic changes in the Silvertown Tunnel's area of influence is one of the major strands that comprise the Monitoring and Mitigation Strategy (MMS) for the Tunnel (alongside traffic, air quality and noise) and is a requirement of the DCO.

Additional note

- 1.6 It is worth noting that the secondary data analysis presented in this report, in many cases, is based on sources published during the coronavirus pandemic. This document is an update of the baseline report and therefore gives a during-pandemic as well as pre-scheme baseline for future monitoring. The pandemic might be a confounding factor in changes measured against the baseline, although it is likely that the effects of the pandemic will not be only limited to the study area but also will have an impact on the comparator location.
- 1.7 Similarly, the 2021 surveys with businesses and residents were also impacted by the pandemic but it is likely that its effects are less so on the 2023 findings. Nevertheless, this should be noted when making comparisons between the 2021 and 2023 wave.

Structure of this report

- 1.8 This report is structured around the following sections:
- Section 2-3 includes the secondary data analysis
 - Section 4-8 covers the business survey results
 - Section 9-14 presents findings from the resident survey
 - Section 15 outlines the main conclusions from the business and resident surveys

2 Secondary Data Analysis: Introduction

Introduction

Second wave of secondary data

As part of this second wave analysis, all the data sources that were used in the first wave have been reviewed to identify any newly published data. This includes travel, economic, and socio-demographic indicators used for the first wave. However, it has not been possible to update all indicators, as a result of either delays on the publication of official data, or the frequency of the data updates being lower than that of the secondary data waves (e.g. Census data).

The analysis of the data has been undertaken for the study area and control areas (West London and Greater London) defined in the first secondary data wave in 2020. Given that the scope areas, the data sources, and the indicators are the same in both waves, and that the same analysis and numerical and graphical outputs have been produced, we have been able to compare them directly to understand any potential changes in data and trends, and to ensure consistency between survey waves.

The indicators used in these secondary data analysis waves will be updated and examined in the period after the opening of the tunnel, to identify any underlying trends, both general and local, that may affect the overall impact of the tunnel on business and social wellbeing in east London.

Changes between the two waves include:

Economic

- *Business Floorspace*
 - o Total floorspace dedicated to business purposes had remained constant in the study area for the last ten years pre-pandemic (2010-2020) at around 9.8 million sqm, as per data published by the Valuation Office Agency (VOA). This was a combination of small growth of retail, office and 'other', and a steady decline of industrial floorspace. Since then, 'other' has kept growing, with retail and office entering a slight decline. Industrial floorspace has kept its steady declining trend, resulting in an overall reduction of total business floorspace to 9.3 million sqm in 2023.
 - o The control areas have seen similar trends to the study area since the last wave, with the biggest difference being the more pronounced decline in office and retail space (both in West London and Greater London).
- *Claimant count*

- Claimant count percentages have gone up in this secondary data wave compared to the 2020 wave, as the 2022 claimant count data reflects a coronavirus pandemic-related increase in the number of people claiming unemployment related benefits, compared to the 2019 data used in the previous wave.
- *Other indicators with no (or minor) changes*
 - Type and Size of Business: both the business distribution by size band and the employee distribution by sector group have remained largely unchanged since the 2020 secondary data wave. This is in the study area and the comparison vs the comparator areas.
 - Household income and housing affordability: This has remained largely unchanged since the previous secondary data wave (2020), which used 2018 net equivalised household income data.
 - Areas with expected housing development: the majority of areas with intense residential development growth in recent years in the study area coincide with areas expected to have additional net growth in the near future. This is a similar picture to that of the 2020 secondary data wave analysis.
 - Deprivation: no change to the data sources (IMD 2019)

Transport

- *Public Transport Accessibility Levels (PTAL)*
 - The PTAL values used here are slightly different to those reported in the 2020 secondary data wave, as that used 2015 PTAL values. Between 2015 and 2023 there have been some improvements in public transport frequency and capacity, and the addition of the Elizabeth Line, which have improved PTAL values in some locations of the study area.
- *Travel demand trends*
 - While there has been little change in the car/van accessibility figures in the study area and in Greater London between the previous secondary data wave in 2020 (using 2017-2019 LTDS data) and the current wave (using 2022/23 LTDS data, reflecting the immediate period of recovery from the impacts of the pandemic), there have been some relevant changes to other travel patterns, mainly regarding mode and purpose splits. Consistent with transport trends across the city since the coronavirus pandemic, the study area has seen an increase in walking and cycling mode shares in between data waves, with a decrease in public transport use and relatively stable use of private transport. In terms of purpose splits, there has been an overall decline in commuting, which has been partially offset by an increase in leisure trips.
- *Commuting patterns*
 - Geographical commuting patterns have not been updated (no equivalent data available since 2011 census).

Socio-demographic

- None of the socio-demographic indicators have changed much since the previous wave (population, population change, age distribution, school census groups). This is not unexpected given the relatively short timeframe between the waves (2020 and 2023) compared to longer term population changes. In some cases, data sources have not been updated since the previous wave and therefore the same data is reported (e.g. ethnicity data).

Counterfactual

The overall picture is of small changes in the secondary data reported since the previous wave, with the impacts of the coronavirus pandemic being the main driver of change, especially for transport and some economic indicators.

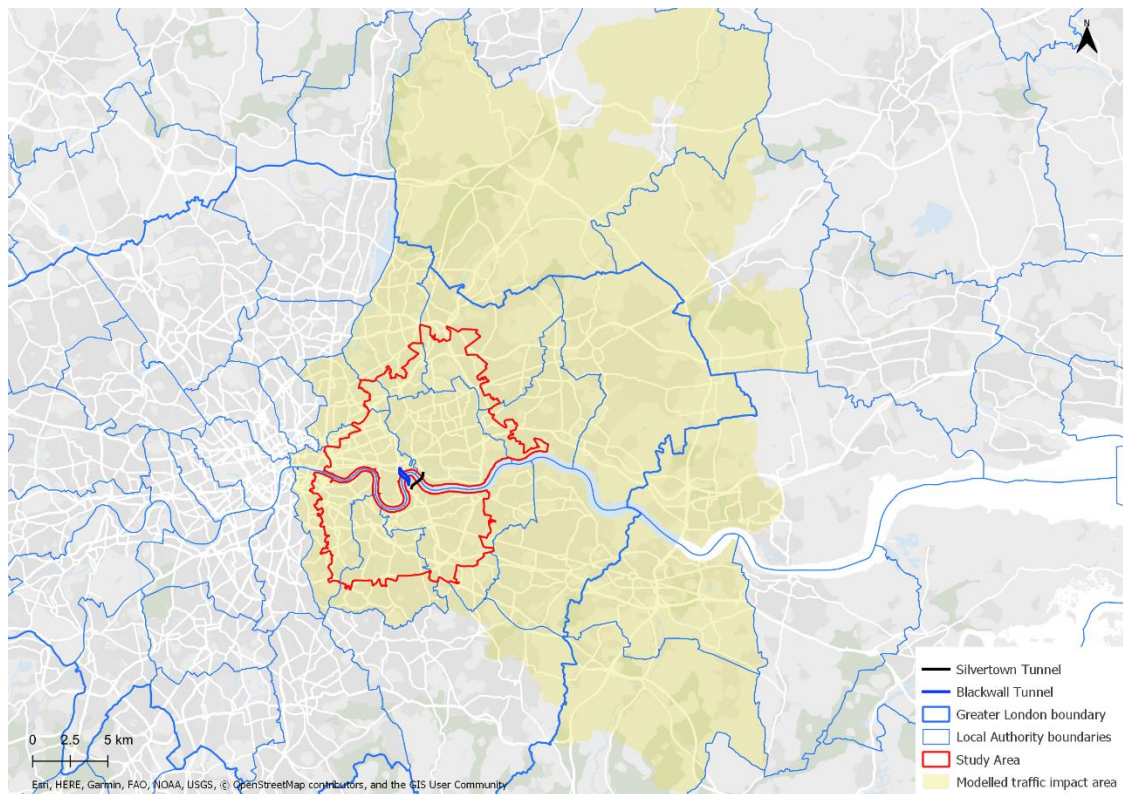
Distinguishing between causation and correlation within the study area would be a challenge even without major confounding factors because it is not possible to establish a reasonable control area against which to monitor changes in the tunnel's area of influence. There are no other parts of London suitably unaffected by the new infrastructure that would act as a suitable comparator.

The socio-economic monitoring approach therefore includes a more flexible analysis of data at London-wide and borough levels to examine changes in indicators outside the area of influence of the tunnel at various scales. Observed changes could be due to the pandemic or could be a consequence of other factors such as the UK's departure from the European Union, general economic trends, or major regeneration projects underway in east London.

Study Area

- 2.1 We sought to select a study area for the socio-economic monitoring which covers the expected area of impact of the tunnel.
- 2.2 The definition of this area is influenced by the expected impacts of the scheme on travel patterns and, subsequently, on socio-economic indicators – the tunnel's area of influence. For this purpose, the available documentation about traffic modelling undertaken for the scheme has been explored to understand what the extent of the forecast impacts of the scheme on traffic patterns will be and use this to inform the definition of the study area.
- 2.3 Two documents informed identification of the study area, these were the Base Year Model Validation Report and a modelling review undertaken by Steer in 2016. Figure 2.1 shows the study area for the socio-economic monitoring.

Figure 2.1: Study area for secondary data analysis



- 2.4 The extent marked by the yellow area reflects the wider impact area of the scheme, aligning broadly with the traffic model simulation area and the area where appreciable traffic flow change is modelled to occur. The area within the red boundary represents the relatively 'local' area of impact for the tunnel. This has been selected as the study area and will be referred to as such in this report.
- 2.5 It is true that the strategic traffic modelling forecasts flow changes as far as the M25, and in some cases beyond. However, for the definition of the study area for the socio-economic monitoring an important consideration is that the larger the area of interest is, the more complex the analysis will become, and subsequently the challenges in attribution of changes in local characteristics and transport, economic and social trends to the Silvertown Tunnel scheme.
- 2.6 Scale is also the reason behind the choice of Middle Super Output Areas (MSOAs) as the geographical unit to define the study area, as using Lower Super Output Areas (LSOAs) or Output Areas (OAs) would entail a level of geographical sensitivity that our assumptions could not support.

Control Area

Rationale

- 2.7 We have also sought to identify a control area or areas, to compare the changes in social, economic or transport indicators with those in the study area. The rationale here is that, when comparing the study area with an area outside the tunnel's area of influence, and therefore theoretically unaffected by it, the analysis would be able to attribute with more certainty the trends and changes in the assessed indicators to either wider trends or potential impacts resulting from the tunnel.

2.8 It is important to note that this analysis and the comparison of changes in the study versus the control areas must be done carefully, as it cannot be assumed that all differences between the trends in both areas are directly attributable to the scheme. Multiple factors will have an impact on the assessed indicators other than those directly related to the opening of Silvertown Tunnel, and these factors might be different in both the control and study areas.

Potential control areas

2.9 The aim is to apply different control areas depending on the indicator that is being evaluated and monitored. Examples of this could be a sub-area of London (such as individual or groups of boroughs), Greater London or even the entire country. This reflects the different spatial scales of the impacts and the data that is available to evaluate them. While this approach has its own challenges, it provides a greater degree of flexibility and is not constrained by the definition of a fixed control area based on pre-scheme conditions.

2.10 For this reason, for the purposes of this secondary data baseline analysis, two comparator areas have been defined to contextualise the latest available data from the study area. While these comparator areas are not necessarily the control areas that will be used for subsequent monitoring reports about the impacts of the scheme, they are useful for presenting existing baseline data and put the social, economic and transport indicators from the defined study area of the scheme in a regional context.

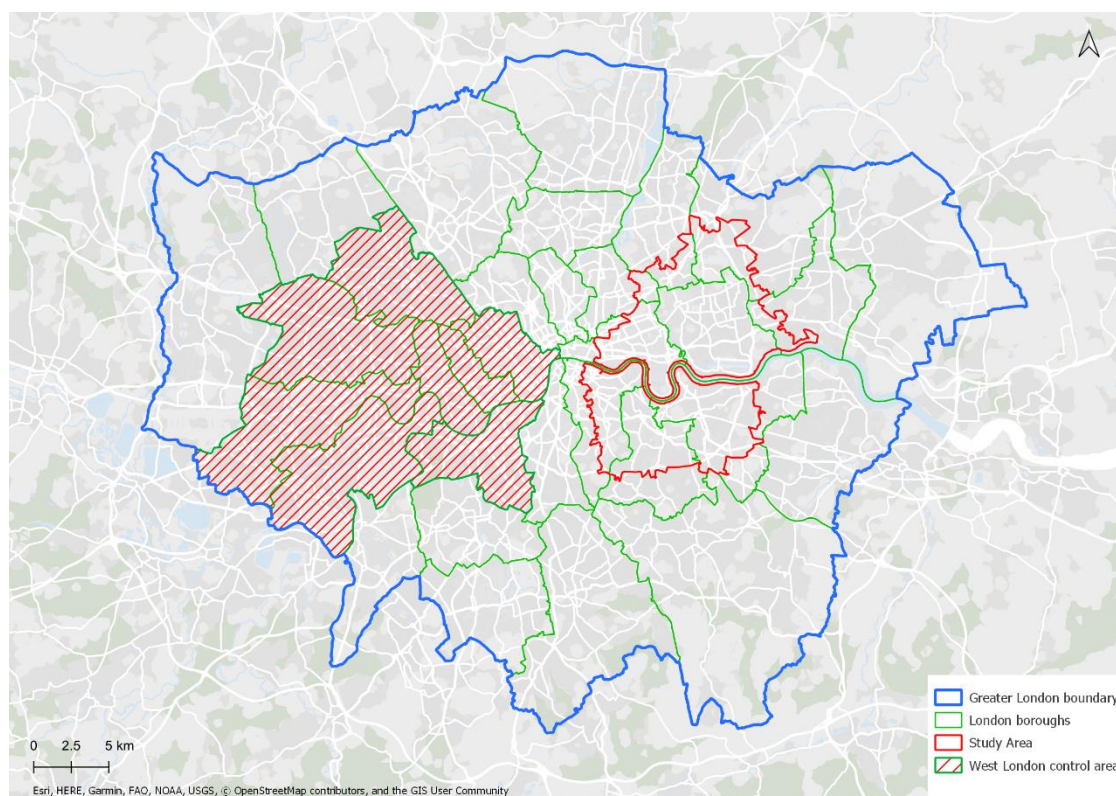
2.11 The two comparator areas referred to in this report are the following:

- A West London area, as defined below; and
- Greater London.

2.12 An area formed of eight boroughs in west London has been selected. The boroughs are Brent, Ealing, Hounslow, Richmond, Wandsworth, Hammersmith and Fulham, Kensington and Chelsea and the City of Westminster. These eight boroughs together occupy a similar area and have a similar population size to the boroughs of the proposed study area.

2.13 Figure 2.2 shows the location of the West London comparator area.

Figure 2.2: Proposed west London comparator area



Secondary Data Sources

- 2.14 As explained in the introduction, the analysis of secondary data focuses on three areas or themes of interest, namely transport and travel, economic and social trends. Data has been collated from, in the majority of cases, publicly available official sources, such as the Office for National Statistics (ONS).
- 2.15 Table 2.1 lists secondary data sources that have been explored and processed for the purposes of this study, together with the theme of interest and the spatial area at which data is provided. This data has been collected and processed for the whole of London and has been subsequently filtered to produce detailed analysis and summaries for the study and comparator areas

Table 2.1: Secondary data sources, theme and level of detail

| Name | Source | Theme | Level of detail | Data used for 2020 wave | Data used for 2023 wave |
|---|--------------------------|-----------|---------------------|-------------------------|-------------------------|
| Claimant count | ONS, Nomis | Economic | LSOA | 2019 | 2022 |
| Employees (total and full time), by 2-digit SIC2007 sector and sector group | BRES, Nomis | Economic | LSOA | 2019 | 2022 |
| Business counts (by employment size band), by 2-digit SIC2007 sector and sector group | IDBR, Nomis | Economic | MSOA | 2019 | 2022 |
| Residential prices and sales (mean and median values) | ONS, HM Land Registry | Economic | LSOA | Up to 2019 | Up to 2022 |
| Net equivalised household income (before and after housing costs) | ONS | Economic | MSOA | 2018 | 2020 |
| Housing affordability, housing market | ONS | Economic | MSOA | 2018 | 2020 |
| Business floorspace | VOA | Economic | LSOA | 2010-2020 | 2010-2023 |
| Development data | LDD | Economic | Postcode | Up to 2019 | Up to 2023 |
| Population density | ONS | Social | OA | 2019 | 2020 |
| Population change between 2009 and 2014 and 2019 | ONS | Social | LSOA | Up to 2019 | Up to 2020 |
| Population by age (and specific under-18 and over-65 groups) | ONS | Social | OA | 2019 | 2020 |
| Ethnicity | ONS | Social | LSOA | 2011 (Census) | 2021 (Census) |
| Indices of Multiple Deprivation | MHCLG | Social | LSOA | 2019 | 2019 [No new data] |
| Pupil numbers and characteristics | School Census | Social | OA | 2020 | 2023 |
| Cross-Thames commutes (people living in/commuting to the area) | 2021 Census, Nomis | Transport | OA | 2011 | 2011 [No new data] |
| Transport Classification of Londoners (TCoL) | TfL | Transport | OA | 2015 | 2015 [No new data] |
| Public Transport Accessibility Levels (PTAL) | TfL | Transport | 100m grid, OA, LSOA | 2015 | 2023 |
| Travel to work data, by mode | 2011, 2021 Census, Nomis | Transport | MSOA | 2011 | 2011 [No new data] |

| | | | | | |
|------------------------------------|-----|-----------|---|-----------|---------|
| London Travel Demand Survey (LTDS) | TfL | Transport | - | 2017-2019 | 2022/23 |
|------------------------------------|-----|-----------|---|-----------|---------|

Availability, detail and update frequency

- 2.16 In addition to the interest or relevance that different data sources or indicators may have for monitoring purposes, it is crucial to consider the level of detail, generally in spatial terms, that the datasets can offer. The tunnel’s area of influence extends across several London boroughs but includes only part of some of them; therefore, it is required that the secondary data used for the analysis can be disaggregated to a level lower than the local authority.
- 2.17 Official statistics of smaller areas in the UK tend to be published at OA, LSOA and MSOA levels, from smaller to larger size. As MSOAs have been used as the building blocks of the study area, secondary data analysed and presented in this report has been collected at MSOA or lower level.
- 2.18 The working assumption for the secondary data collection has been that data should be collected to the highest level of detail available, keeping in mind that this can be later combined into larger areas (less detailed) if more appropriate for reporting purposes. The most recent data available for each of the datasets listed in Table 3.1 has been processed and compiled in spreadsheet format, as well as in GIS format for visualisation purposes.
- 2.19 The frequency with which datasets are updated is a key variable for consideration. Given the requirement for annual reporting of secondary data analysis, it makes sense that all, or at least a majority of, indicators assessed as part of the secondary data analysis are updated at least annually.
- 2.20 This is the case for most data sources identified, especially for those in the economic and social themes. However, other data sources are updated with less frequency (mainly those linked to Census data and local transport data at finer spatial levels of disaggregation).
- 2.21 This is the second wave of secondary data analysis, with the first wave completed in 2020. The year each of the data sources refers to in each wave is also provided in the table above, for reference. Some datasets have been updated every year, with others having a longer update interval or being severely impacted by the coronavirus pandemic. This results in a non-homogeneous pattern of updated data sources between secondary data waves.
- 2.22 For the purpose of this report, data from sources like the 2011 and the 2021 Census has been included because it is valuable to define a baseline narrative and to describe the study and comparator areas, showing general trends that may help understand specific local characteristics. It is assumed that only periodically updated datasets, with a frequency equal to or greater than the monitoring updates, will be used in subsequent monitoring reports after the scheme opens.

3 Secondary Data Analysis: Economic, Social and Travel Indicators

Economic Indicators

Business and employees by sector

- 3.1 Business counts and employee data used for the analysis have been obtained from the Inter Departmental Business Register (IDBR) and the Business Register and Employment Survey (BRES), respectively, classified in employment sectors as per the 2-digit SIC2007 classification. They have been subsequently grouped into five sector groups, as defined in the September 2015 Silvertown Tunnel Business Survey:
- Primary/Manufacturing;
 - Construction;
 - Transport, Retail and Distribution (TRAD);
 - Private Services (e.g. financial, technical and administrative activities); and
 - Public Services (public administration and defence).
- 3.2 It must be noted that figures are provided rounded in the IDBR and BRES data, with different rounding approaches depending on the value. Therefore, data has been extracted at the highest spatial level compatible with the study area definition to minimise the rounding effect (i.e. MSOA level).
- 3.3 Being able to disaggregate employment and business counts by sector will allow for specific impact assessment on each business sectors, to see whether the tunnel may have different impacts depending on the industry.
- 3.4 Table 3.1 shows the proportion of businesses in the study and comparator areas that belong to each of the five sector groups listed above, by size band in terms of number of employees. The latest data available, from 2023, has been used. It can be seen that the study area has a higher proportion of businesses in the TRAD sector group and a lower proportion within Private Services than both comparator areas. In terms of business size, the study area has a lower proportion of large businesses (more than 50 employees) – 0.7%, compared to 1.30% in the West London comparator area and 1.2% for Greater London.
- 3.5 This business distribution by size band has remained largely unchanged since the 2020 secondary data analysis.

Table 3.1: Total number of businesses by size band and sector group (2023)

| Area | Business size band | 1: Primary, Manufacturing | 2: Construction | 3: TRAD | 4: Private services | 5: Public services | Total |
|----------------------------------|--------------------|---------------------------|-----------------|--------------|---------------------|--------------------|----------------|
| Study Area | 0-9 | 1.9% | 11.8% | 27.1% | 59.2% | - | 51,310 |
| | 10-49 | 0.9% | 4.6% | 38.4% | 56.1% | - | 2,720 |
| | 50-249 | - | 1.7% | 16.7% | 81.7% | - | 300 |
| | >250 | - | - | - | 94.7% | 5.3% | 100 |
| | Total | 2.1% | 11.2% | 27.3% | 59.5% | 0.0% | 56,390 |
| Comparator Area – West London | 0-9 | 1.9% | 9.7% | 20.7% | 67.6% | - | 131,930 |
| | 10-49 | 1.4% | 3.4% | 34.3% | 61.0% | - | 10,590 |
| | 50-249 | 1.5% | 0.9% | 32.9% | 64.3% | 0.3% | 1,640 |
| | >250 | 1.7% | - | 32.2% | 61.0% | 5.1% | 300 |
| | Total | 2.1% | 9.1% | 21.8% | 67.0% | 0.0% | 148,740 |
| Comparator Area - Greater London | 0-9 | 1.9% | 12.7% | 22.2% | 63.2% | - | 459,220 |
| | 10-49 | 1.6% | 3.8% | 32.1% | 62.5% | 0.0% | 30,470 |
| | 50-249 | 0.8% | 0.8% | 21.6% | 76.6% | 0.1% | 4,730 |
| | >250 | 0.5% | 0.5% | 17.2% | 79.3% | 2.5% | 990 |
| | Total | 2.1% | 11.9% | 22.6% | 63.4% | 0.0% | 510,840 |

Source: Inter-Departmental Business Register (IDBR) 2023

- 3.6 Table 3.2 summarises the number of employees by sector group in the study and comparator areas. In this case, the latest available data, from BRES, is from 2022. In this case we see the opposite pattern regarding TRAD and Private Services as seen when looking at business counts. The proportion of employees in TRAD is lower in the study area than in the comparator areas, while the proportion of those in Private Services is higher. This indicates that the study area has a smaller average business size in the TRAD sector and a larger average business size in the Private Services sector than the comparator areas.
- 3.7 As for the business distribution by size band, the employee distribution by sector group has remained largely unchanged since the 2020 secondary data analysis.

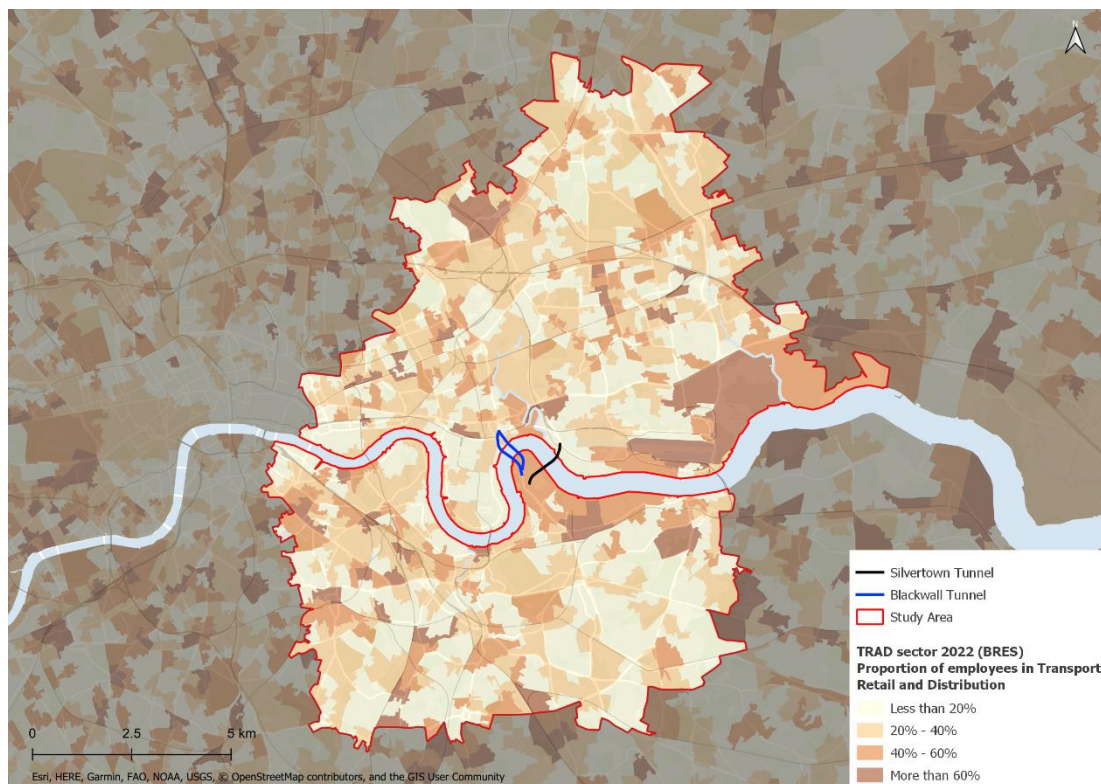
Table 3.2: Total number of employees by sector group

| Area | 1: Primary, Manufacturing | 2: Construction | 3: TRAD | 4: Private services | 5: Public services | Total |
|-------------------------------|---------------------------|-----------------|---------|---------------------|--------------------|-----------|
| Study Area | 15,885 | 23,365 | 154,755 | 490,420 | 39,610 | 724,035 |
| | 2.2% | 3.2% | 21.4% | 67.7% | 5.5% | |
| Comparator Area – West London | 50,220 | 44,565 | 480,210 | 996,115 | 108,155 | 1,679,265 |
| | 3.0% | 2.7% | 28.6% | 59.3% | 6.4% | |

Source: Business Register and Employment Survey 2022

3.8 The locations within the study area with higher concentrations of employment in the TRAD sector group are in the Greenwich-Charlton area, areas north of Stratford rail stations, London City Airport and the Beckton-Creekmouth area. This can be seen in Figure 3.1.

Figure 3.1: Proportion of employees in TRAD sector group



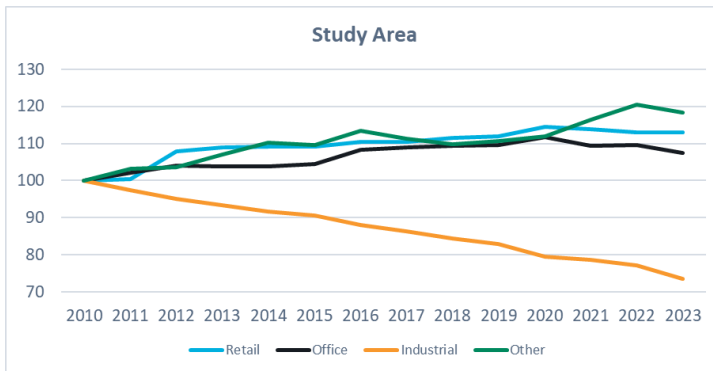
Source: Business Register and Employment Survey 2022

Business floorspace

3.9 Total floorspace dedicated to business purposes has remained constant in the study area for the last ten years pre-pandemic (2010-2020) at around 9.8 million sqm, as per data published by the Valuation Office Agency (VOA), with a decline after that, to 9.3 million sqm in 2023. However, the individual components (retail, office, industrial and other) have had different trajectories during the period. While floorspace dedicated to industrial uses has seen a rapid decline over this ten-year period, reducing by 25%, the other three uses increased between 12% (Office) and 17% (Other) by 2020. Post-pandemic, ‘other’ uses

have continued growing, with Office and Retail in slight decline. Figure 3.2 Figure 3.2: Business floorspace by type in the study area shows this trend in the study area.

Figure 3.2: Business floorspace by type in the study area



3.10 This pattern of decreasing industrial space and growing retail, office and other types of floorspace can also be seen at a London-wide level, although it has been less pronounced here over the same period, with a 10% decrease in industrial floorspace and a 3-5% increase in the other three categories by 2020. Post-pandemic, while industrial and ‘other’ have continued their downward and upward trends, respectively, retail and office have seen their trends reverse and reduce in total floorspace. In the West London Comparator Area, the situation has been similar to Greater London, with an even larger decrease in office floorspace in relative terms. Figure 3.3 and Figure 3.4 illustrate these trends.

Figure 3.3: Business floorspace by type (West London Comparator Area)

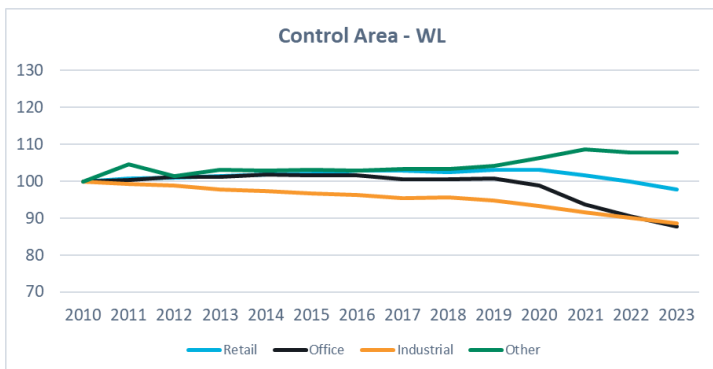
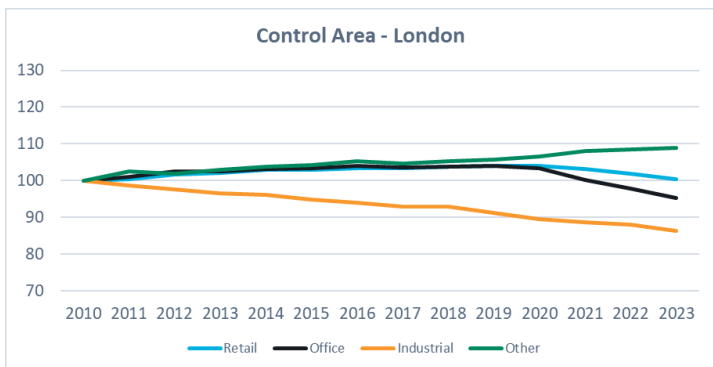


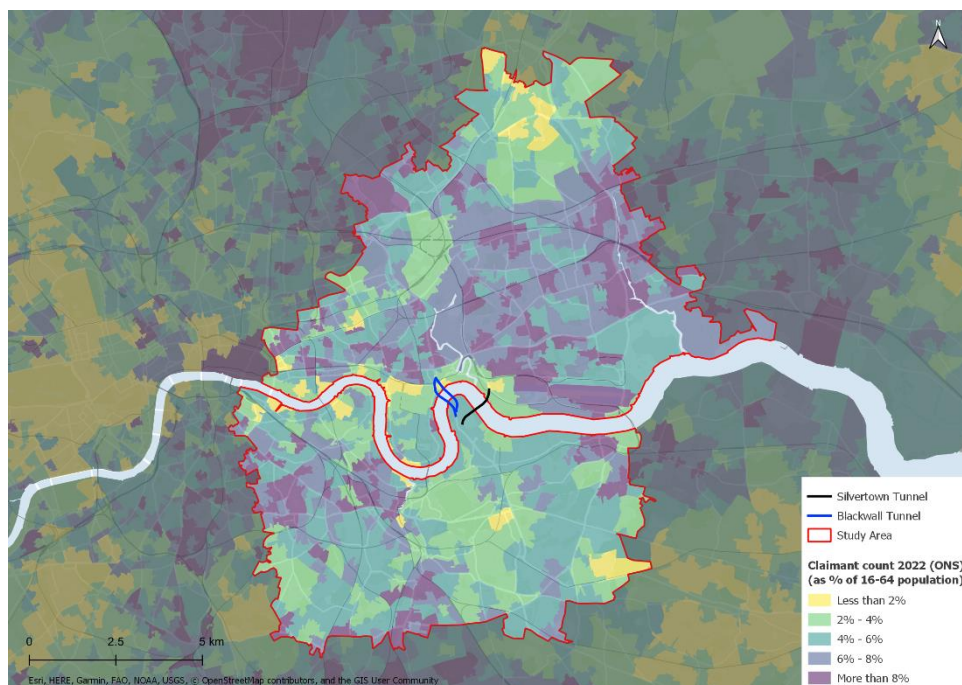
Figure 3.4: Business floorspace by type (Greater London Comparator Area)



Unemployment – Claimant Count

- 3.11 Claimant count is a measure of the number of people claiming benefits principally for the reason of being unemployed and includes Jobseeker’s Allowance (JSA) and Universal Credit (UC). The ONS recognises that, “due to the large correlation between those claiming benefits for unemployment-related purposes and people who are unemployed, the Claimant Count is also often used as a proxy for unemployment. This is particularly the case for smaller domains such as local geographic areas...”. As official unemployment statistics are published at a local authority level, the claimant count measure allows for a more detailed analysis of unemployment levels and comparison between smaller areas.
- 3.12 Figure 3.5 shows the claimant count as a percentage of the population aged between 16 and 64 in the study area. Areas with higher claimant counts are located to the southwest, in Southwark, to the east, north of the river, in Newham, and in Poplar and Whitechapel, in Tower Hamlets. Lower levels of claimant count are found towards the north end of the area (Wanstead) and in pockets in several areas in Eltham and Rotherhithe.

Figure 3.5: Claimant count (2022)



Source: ONS

- 3.13 Using average figures for 2022, the claimant count in the study area (5.7%) is higher than both the West London comparator area (4.7%) and Greater London (4.9%), indicating that the study area is likely to experience higher levels of unemployment than is the case for the comparator areas. The study area equally exhibits a higher claimant count than is the case nationally for the same period (3.9% in England).
- 3.14 In absolute numbers, average claimant count in the study area through 2022 was over 56,000 people. Actual unemployment figures are not provided with a spatial disaggregation lower than local authority. Table 3.3 shows the 2022 unemployment figures for the local authorities covered by the study area and the total for Greater London.

Table 3.3: Model-based estimates of unemployment (ONS, 2022)

| Local authority/region | Modelled unemployment January-December 2022 |
|------------------------|---|
| Barking and Dagenham | 5,400 |
| Greenwich | 7,500 |
| Hackney | 10,200 |
| Lewisham | 9,100 |
| Newham | 12,300 |
| Redbridge | 8,000 |
| Southwark | 11,000 |
| Tower Hamlets | 8,700 |
| Waltham Forest | 8,600 |
| Greater London | 224,500 |

3.15 Claimant count percentages have gone up in the secondary data analysis undertaken in 2023 compared to that undertaken in 2020, as the 2022 claimant count data reflects a coronavirus pandemic-related increase in the number of people claiming unemployment related benefits, compared to the 2019 data used previously.

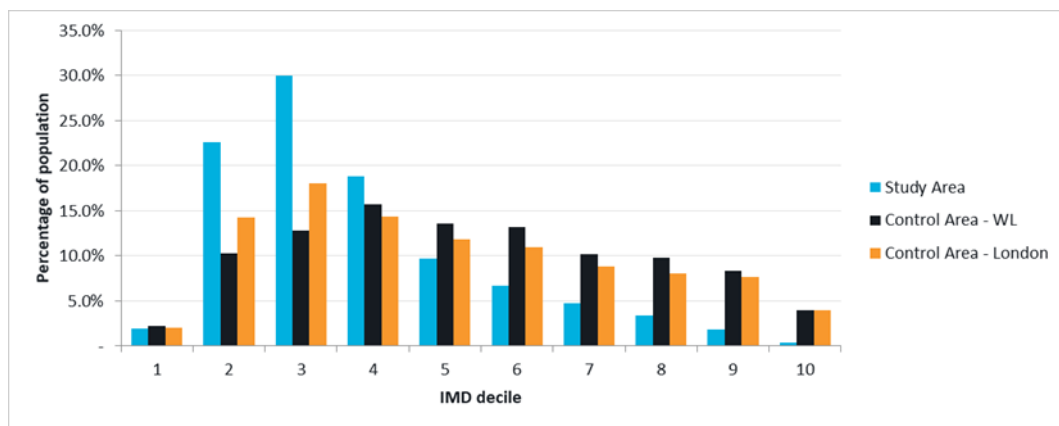
Deprivation

3.16 The Index of Multiple Deprivation (IMD) is the official measure of relative deprivation in England and was last published in 2019 by the Ministry of Housing, Communities and Local Government (MHCLG).

3.17 This IMD measure is based on 39 separate indicators, organised across seven domains of deprivation (i.e. income, health, crime), which are weighted and combined to calculate the IMD.

3.18 The study area has a significant proportion of population living in areas with high levels of deprivation (lower IMD deciles), when compared with all areas in England. Figure 3.6 shows the distribution of population in the study area, the comparator area in West London and Greater London, by IMD decile.

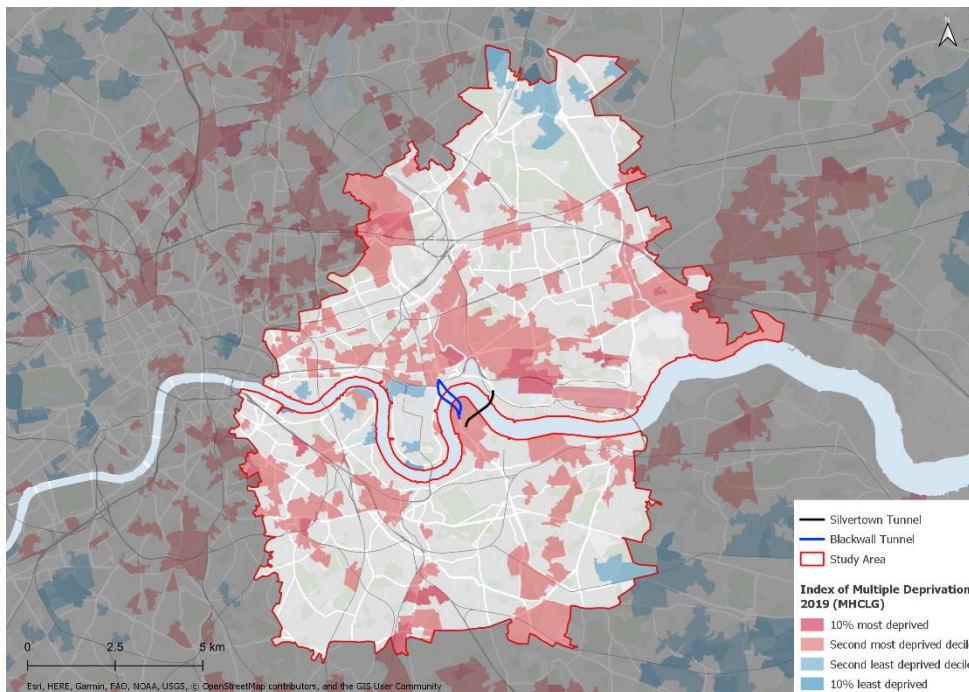
Figure 3.6: Index of Multiple Deprivation (England 2019), deciles



Source: MHCLG

- 3.19 The geographical distribution of areas in the top 20% most and least deprived in the study area is shown in Figure 3.7. There are highly deprived areas directly to the north and south of either end of the tunnel, especially along the northern bank of the River Thames. There are other deprived areas in Southwark, Greenwich, Hackney and Barking.
- 3.20 There is some degree of correlation between areas in more deprived deciles (red areas) and those with higher levels of claimant count, indicating a correlation between unemployment and overall deprivation. This is consistent with the fact that the Income and Employment deprivation domains (both directly related to employment status and therefore claimant count) account for 45% of the IMD value.

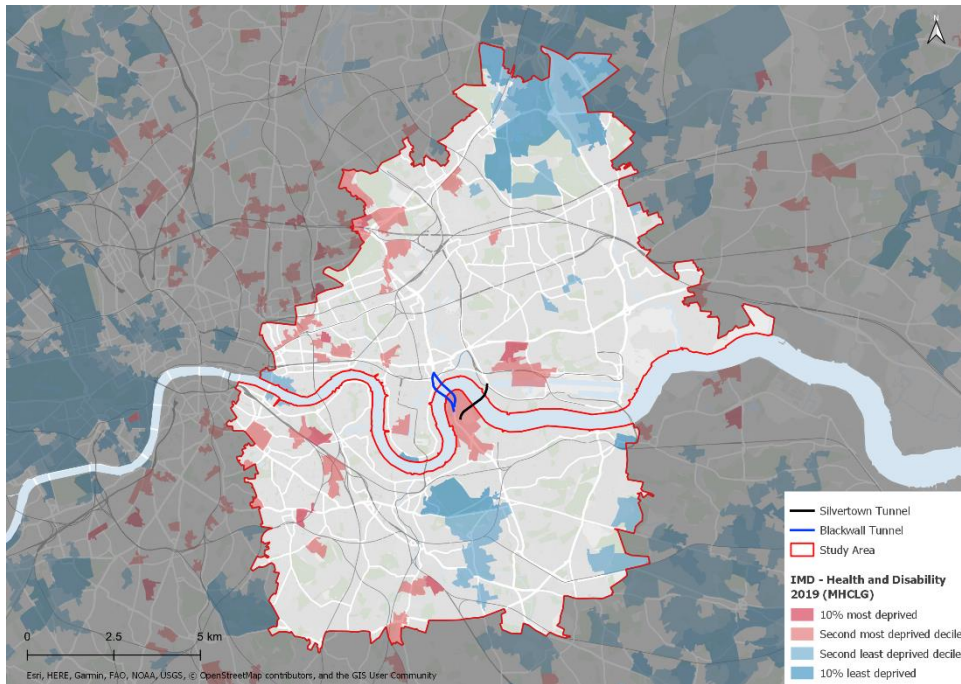
Figure 3.7: Indices of Multiple Deprivation (England 2019) - Most and Least Deprived



Source: MHCLG

- 3.21 The Health Deprivation and Disability deprivation domain measures the risk of premature death and the impairment of quality of life through poor physical or mental health. This includes morbidity, disability and premature mortality.
- 3.22 Figure 3.8 shows the location of areas within the two most and least deprived deciles in England in 2019. When compared to the global IMD data, the study area ranks better in this domain, with fewer areas in the most deprived quintiles and more areas in the least deprived quintiles for Health Deprivation and Disability.

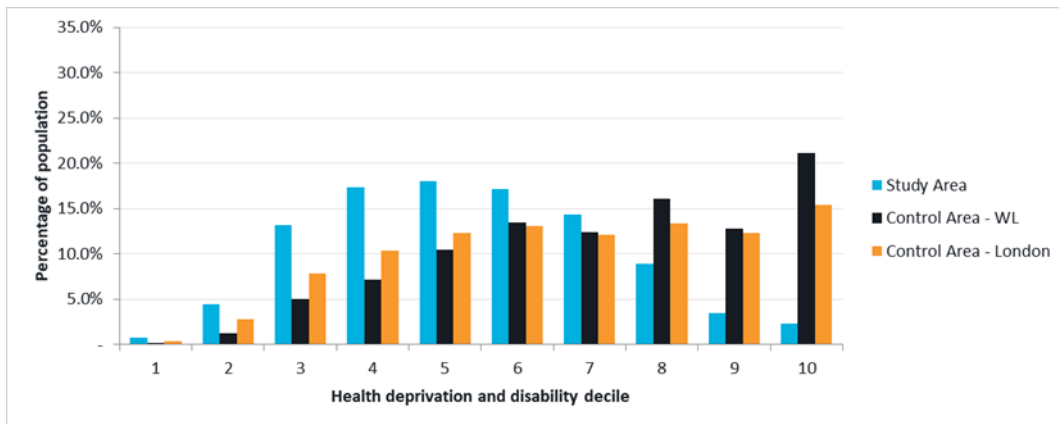
Figure 3.8: Health deprivation and disability (England 2019) - Most and Least Deprived



Source: MHCLG

3.23 Although the study area in this case has a lower level of deprivation when compared to England as a whole (when considering IMD), it is the case that both comparator areas (West London and Greater London) are less deprived than the study area. Figure 3.9 shows the distribution of population in the study area and the comparator areas by Health Deprivation and Disability decile.

Figure 3.9: Health deprivation and disability (England 2019), deciles



Source: MHCLG

Income

3.24 The annual net equivalised household income has been used to analyse income levels in the study area and compare them with those in the comparator areas. As defined by ONS, equivalisation is a standard methodology that adjusts household income to account for the different financial resource requirements of different household types, including household size. The equivalised income statistics are calculated before and after

accounting for housing costs. Here, income before housing costs has been compared, as housing affordability is treated separately.

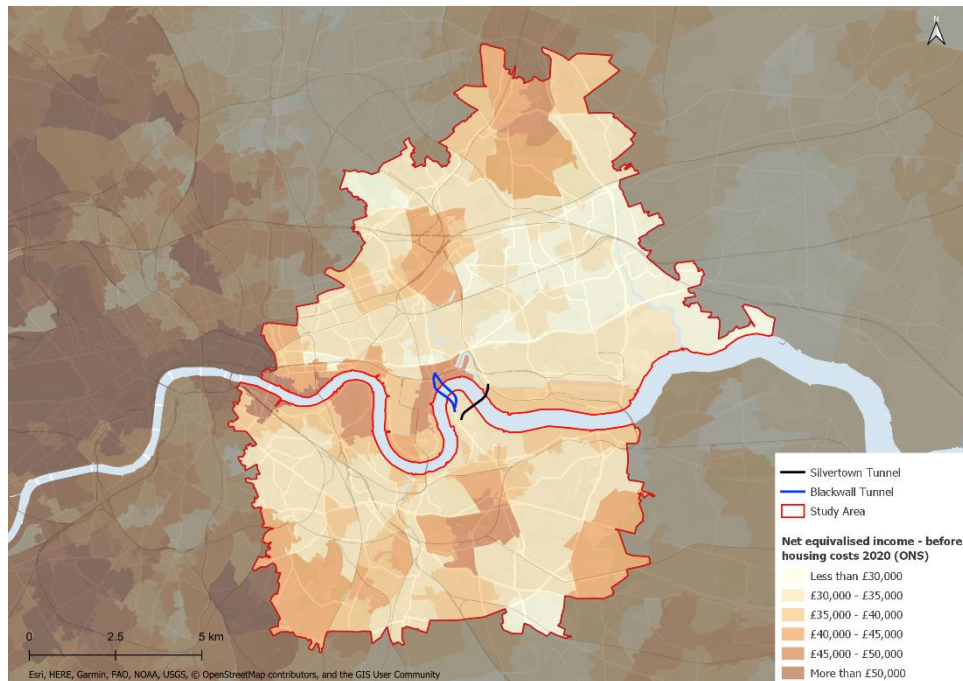
- 3.25 The average equivalised income in the study area, using the latest available data from 2020, is just under £36,000 per annum, lower than both the averages for Greater London and the West London comparator area. Table 3.4 shows these values and the upper and lower limits of the 95% confidence interval, as published by ONS.
- 3.26 This has remained largely unchanged since the previous secondary data wave (2020), which used 2018 net equivalised household income data.

Table 3.4: Net equivalised household income (ONS, 2020)

| | Net equivalised household income (£) | Upper confidence limit (£) | Lower confidence limit (£) |
|----------------------------------|--------------------------------------|----------------------------|----------------------------|
| Study Area | 35,395 | 39,759 | 31,500 |
| Comparator Area - WL | 41,528 | 46,795 | 36,860 |
| Comparator Area - Greater London | 38,103 | 42,781 | 33,939 |

- 3.27 In terms of the spatial distribution of income levels within the study area, there are large differences between lower income areas to the east (East Ham-Barking), with averages below £30,000 and higher income areas in Wanstead, Greenwich/Blackheath, the Isle of Dogs, Rotherhithe and Wapping, with average incomes over £45,000 per annum as shown in Figure 3.10.

Figure 3.10: Net equivalised household income - before housing costs (2020)

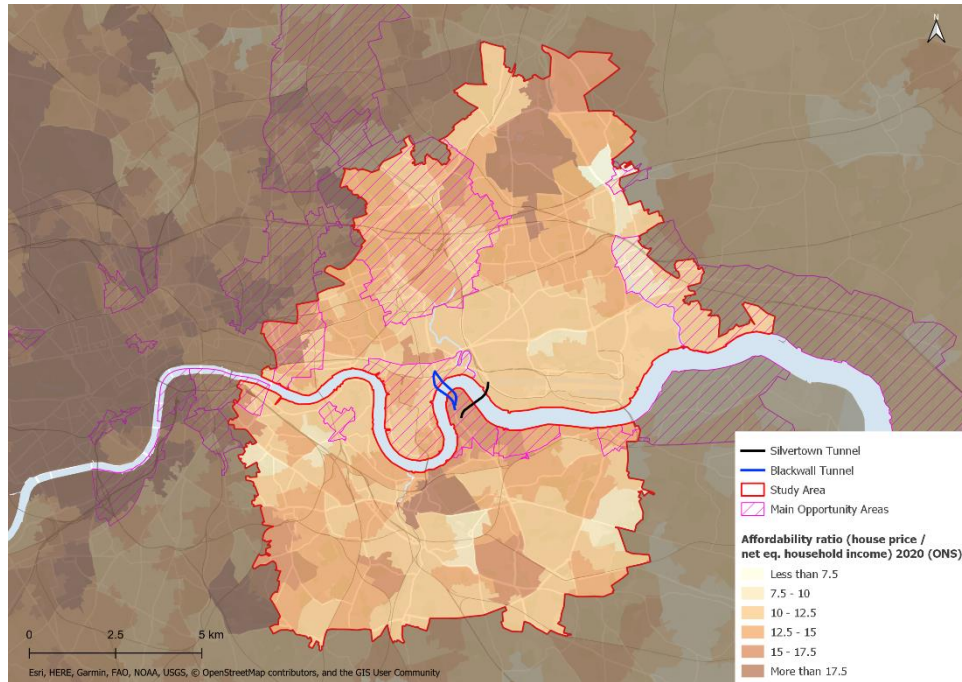


Source: ONS

Housing affordability

- 3.28 Housing affordability is measured as a ratio obtained dividing the average housing sale price by the net equivalised household income, as defined by the ONS. Figure 3.11 shows housing affordability levels in the study area, using data from 2020.

Figure 3.11: Housing affordability (2020)



Source: ONS

- 3.29 The average affordability ratio in the study area is 12.67, with the most affordable areas being to the east, in East Ham, and the least affordable areas to the north, around Wanstead Flats and Wanstead Park.
- 3.30 Overall, the study area is more affordable in terms of housing than both comparator areas. The selected West London comparator area has an affordability ratio of 17.06 while Greater London has a ratio of 13.67. As the ratio is obtained from the housing sale price divided by the equivalised household income, higher ratios mean lower affordability and lower ratios mean higher affordability. The lower ratio in the study area subsequently implies higher affordability. Given that incomes are lower in the study area when compared to both comparator areas, this means that homes are still relatively less expensive compared to other areas even once lower incomes are considered.
- 3.31 The picture of housing affordability in the study area and the comparator areas has stayed broadly similar to the 2020 secondary data analysis, which used 2018 data (vs 2020 data used here).

Housing Developments

- 3.32 There is expected to be significant housing growth in the study area during the coming years, as evidenced by live planning applications for residential developments. Data for the analysis has been obtained from the latest version of the Planning London Datahub

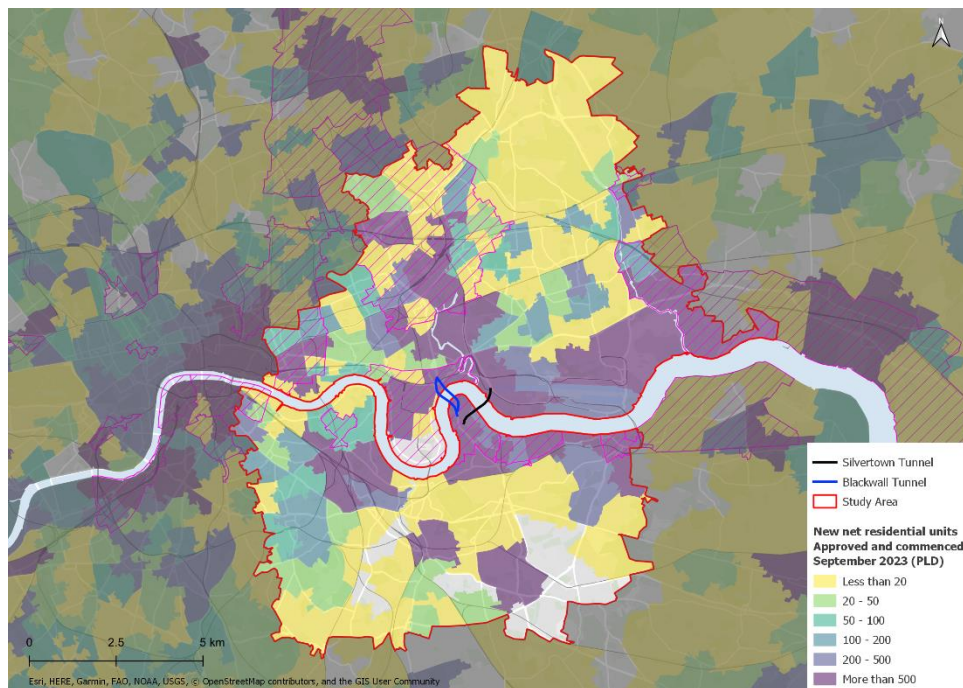
(PLD) (September 2023) and includes planning applications that are labelled as 'commenced', or 'approved' with a lapsed date later than September 2023.

3.33 Considering the planning applications with the above criteria, the study area would see a net addition of 53,000 residential units, compared with 39,000 in the West London comparator area and 190,000 in Greater London. This gives an indication of the larger pipeline of residential developments in this area of London.

3.34 Figure 3.12 shows the spatial distribution of planned new residential developments in the study area. The main area of development is located alongside the Lea Valley, continuing with the growth seen in recent years with the regeneration and conversion of brownfield sites. Other areas in Bermondsey, Canary Wharf, North Greenwich/Woolwich, the Docklands and Barking are also likely to experience significant growth in the short and medium term. Most of these correspond with Opportunity Areas, as designated in the London Plan. The ten Opportunity Areas that fall, totally or partially in the study area are:

- Bankside, Borough and London Bridge;
- Canada Water;
- Charlton Riverside;
- Greenwich Peninsula;
- Isle of Dogs;
- City Fringe/Tech City;
- Olympic Legacy Supplementary Planning Guidance (OLSPG) boundary;
- London Riverside;
- Woolwich; and
- Ilford.

Figure 3.12: Net residential units from planning applications (PLD 2023)



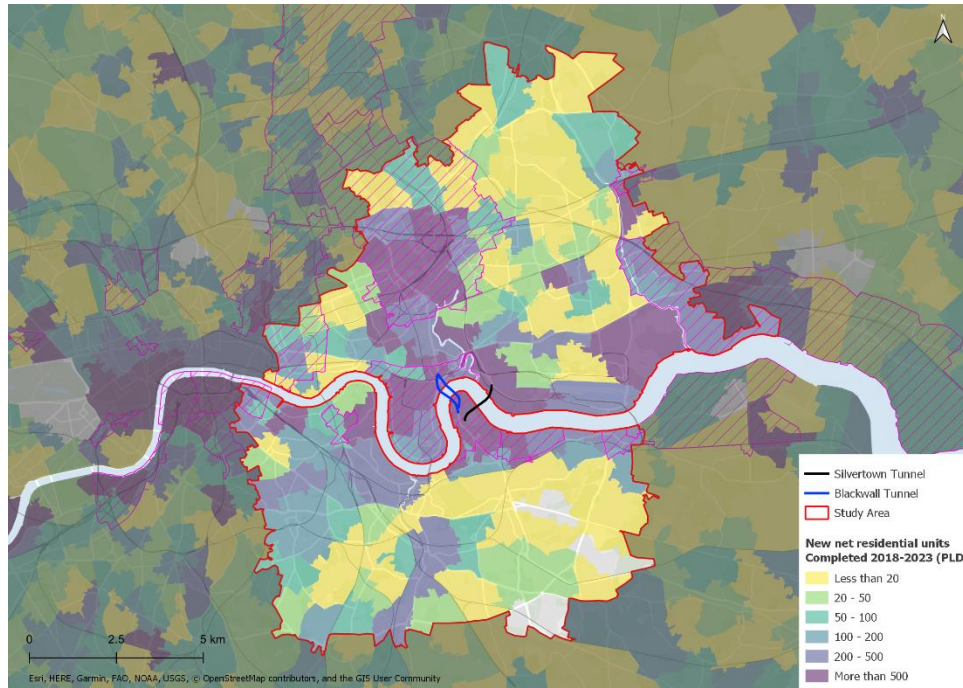
Source: London Development Database

3.35 In the pre-pandemic period of 2015–2020, the study area had a net addition of 52,000 residential units, compared to 48,000 in the West London comparator area and 209,000

in Greater London. These figures correspond to completed planning applications in the PLD with completion construction date within the mentioned period. The figures during the last 6-year period (2018-2023), which includes pandemic years, are clearly lower, with 41,000 net new residential units in the study area, 42,000 in the West London comparator area and 147,000 in Greater London.

- 3.36 Figure 3.13 shows the spatial distribution of these completed residential developments in recent years (2018-2023).

Figure 3.13: Net residential units from completed developments 2018-2023 (PLD 2023)



Source: London Development Database

- 3.37 It can be seen that the majority of areas with intense residential development growth in recent years in the study area coincide with areas expected to have additional net growth in the near future, according to planning applications, such as North Greenwich/Woolwich, the Lea Valley, the Docklands and Canary Wharf. This is a similar picture to that of the 2020 secondary data analysis.

Social Indicators

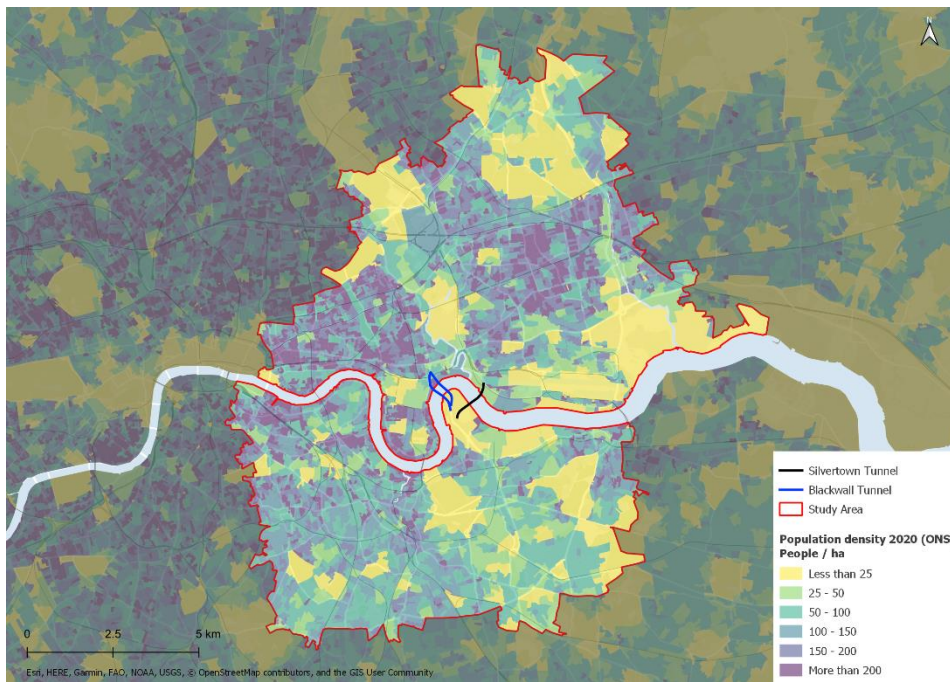
Population

- 3.38 Despite the three-year gap between secondary data waves (2020 to 2023), population data used in this update is only one year newer than the population data used in 2020 (i.e. 2020 vs 2019 data). The reason for this is that the ONS had not published small-area population estimates for 2021 or 2022 at the time of preparation of this report. While there are published 2021 Census population datasets at MSOA-level, it was decided to use the same data source as in the previous wave (the small-area population estimates) for consistency, and to avoid potential short-term population movements as a result of the 2021 lockdowns in place when the 2021 Census was completed.
- 3.39 The population in the study area was 1.4 million people in 2020, as per the mid-year population estimates from ONS. Population density is higher (over 200 people/hectare) in

most areas of Tower Hamlets, central Newham and some pockets in the north of Southwark and around Woolwich. Other areas in Southwark, Lewisham and Greenwich have densities mostly around 50-100 p/ha and there is a clear contrast with sparsely populated areas, which include the Lea Valley, North Greenwich and other areas with parks (Wanstead, Greenwich/Blackheath) or large industrial or employment sites (e.g. Beckton), as shown in Figure 3.14.

3.40

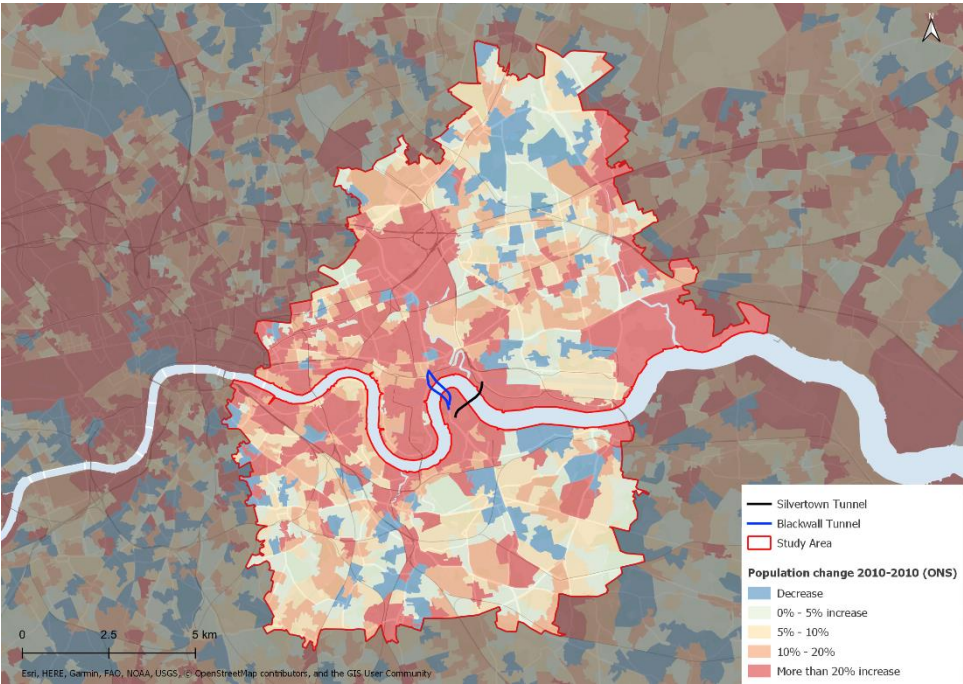
Figure 3.14: Population density (2020)



Source: ONS

- 3.41 While population in the comparator areas is larger (2.1 million in the West London comparator area and 9.0m in Greater London), population growth over the last five (2015-2020) and ten years (2010-2020) has been greater within the study area, with cumulative values of 6.9% and 19.6%, respectively. Both comparator areas show population growth of less than 4% in the 2015-2020 period and less than 12% in the ten years up to 2020.
- 3.42 Figure 3.15 shows the distribution of the 10-year population growth by LSOA. There has been an increase in population in most parts of the study area over the last decade. With the exception of some areas in the north of Southwark and Tower Hamlets, the largest population increases have been associated with new developments in brownfield areas still with 'low' population densities, such as Stratford/Olympic Park, North Greenwich, Canning Town, Silvertown and Beckton.

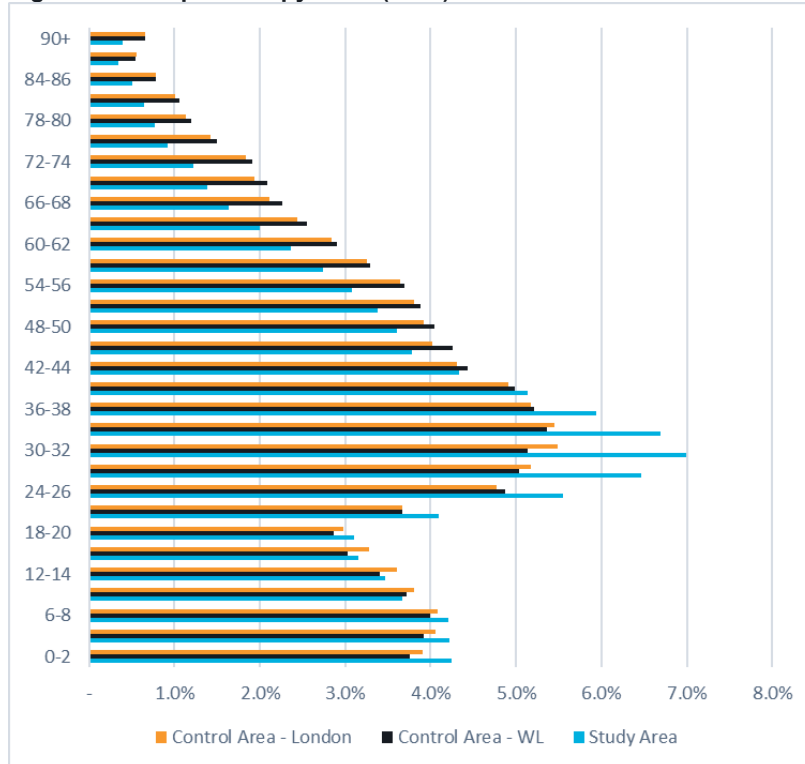
Figure 3.15: Population change 2010 to 2020



Source: ONS

3.43 When looking at the age distribution of the resident population, the study area has a similar proportion to Greater London and the West London comparator area in terms of the population aged under 18 (23.0% in the study area compared to 21.8% in West London and 22.7% in Greater London). However, there is a clear difference in terms of older populations, with the proportion of those aged 65 or more being 8.4% in the study area compared to 12.8% and 12.2% for the comparator areas respectively). This results in a younger population on average. Figure 3.16 compares the population pyramids of the study and comparator areas.

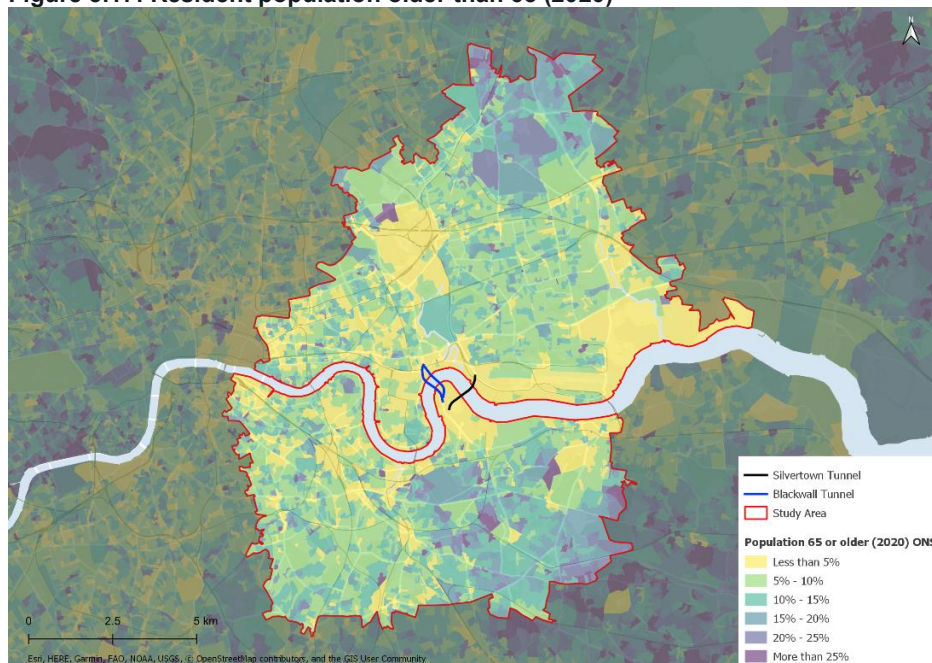
Figure 3.16: Population pyramid (2020)



Source: ONS

3.44 The spatial distribution of older residents (those aged 65 or over) is not homogeneous throughout the study area, with greater concentrations in areas to the north (Wanstead) and to the south east (Greenwich), as shown in Figure 3.17

Figure 3.17: Resident population older than 65 (2020)



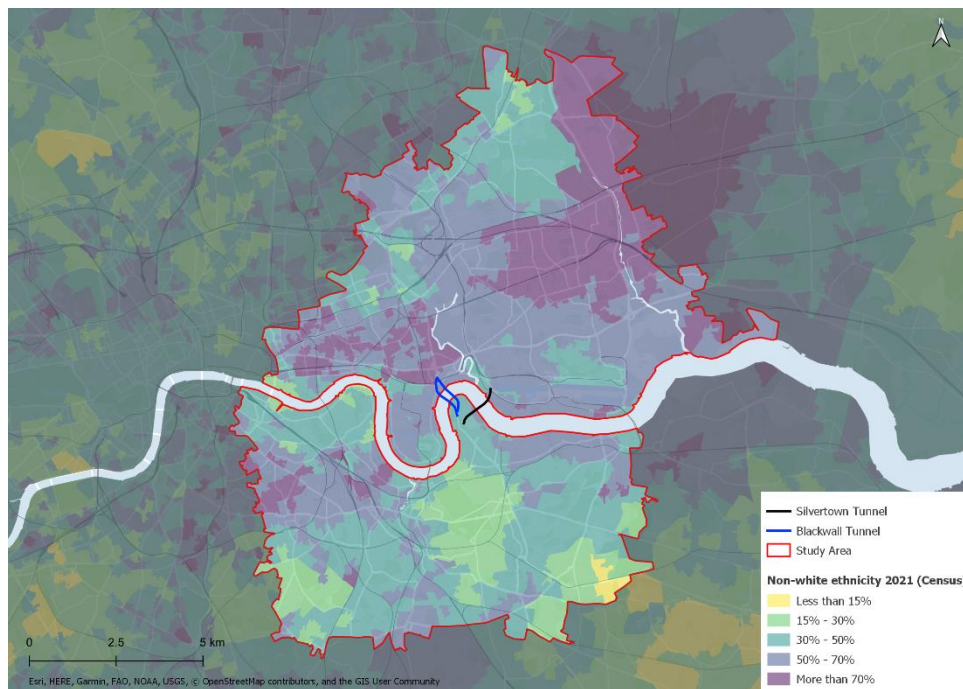
Source: ONS

3.45 As could be expected, the population data used in this secondary data analysis update provides similar results in terms of population density, population change and age distribution in the study area to those produced in 2020.

Ethnicity

- 3.46 Ethnicity data has been obtained by the 2021 Census, as it provides detailed spatial disaggregation, which means that it is unlikely that subsequent updates will have a higher frequency than the defined ten years between censuses. The consequence of this is that this indicator will not be updated for each monitoring report of secondary data and therefore it is unlikely that it will be used to determine the impacts of the scheme. However, it has been included in this baseline report to provide background social data of the study area to inform the general baseline narrative.
- 3.47 In terms of ethnicity, there is not an ethnic classification with a majority (>50%) in the study area. The largest group is formed of residents identifying themselves as white (43%), followed by Asian (29%) and Black (18%). Population identifying as any of the non-white groups, in combination, represent a majority in the study area, comprising 57% of the total population. This is broadly the same as in the 2020 secondary data wave.
- 3.48 This is clearly different from both the West London and Greater London comparator areas, which both have a majority of white ethnic population (54%) and therefore smaller proportions of non-white groups (46%). This data is published by the ONS at small area level (smaller than local authority) only as part of the national Census, and therefore it is expected to be updated every ten years. The latest data corresponds to the 2021 Census.
- 3.49 Figure 3.18 shows the spatial distribution of residents in non-white ethnic groups. The figure shows significant contrasts between areas where white ethnic groups comprise the vast majority (for example Greenwich, Eltham, Wanstead, Bethnal Green, Peckham) and areas where non-white groups represent more than 70% of the population (for example East Ham/Manor Park, Burgess Park, Deptford and areas in Tower Hamlets between Bromley-by-Bow and Whitechapel).

Figure 3.18: Proportion of non-white population (2021 Census)



Source: Census 2021

School Census

- 3.50 The School Census for the 2022/23 academic year provides data at borough and school level regarding total number of pupils and characteristics such as ethnicity, spoken languages, eligibility for Free School Meals (FSM), Special Educational Needs (SEN) and others.
- 3.51 In the study area there are around 210,000 pupils attending nursery, primary and secondary schools, compared to around 325,000 and 1.5m in the West London and Greater London comparator areas, respectively. Table 3.5 shows the number of pupils and the proportions of particular characteristics (for example proportion of pupils who are white British and those for whom English is a first language), comparing the study area and comparator areas.

Table 3.5: School census 2019-20

| Area | Total pupils | Pupils eligible for FSM | White British | English as first language | Special Educational Needs |
|----------------------------------|--------------|-------------------------|---------------|---------------------------|---------------------------|
| Study Area | 209,481 | 31.6% | 13.5% | 47.5% | 16.6% |
| Comparator Area - WL | 325,199 | 24.6% | 19.5% | 48.3% | 16.5% |
| Comparator Area - Greater London | 1,459,882 | 25.8% | 23.2% | 55.4% | 16.5% |

- 3.52 The study area has a higher proportion of pupils eligible for FSM than the comparator areas, and a significantly lower proportion of pupils with white-British ethnicity (14% compared to 20% and 23%), which is a result of the high proportion of non-white population in the area. This is also reflected by the lower percentage of pupils with English as their confirmed first language. These proportions are broadly similar to those in the 2020 secondary data analysis.
- 3.53 The Special Educational Needs classification groups together those pupils with an Education, Health and Care (EHC) plan and those with SEN support. The most common type of need for EHC is autistic spectrum disorders and for SEN support is speech, communication and language needs. The study area has similar proportions of pupils with SEN support and EHC plans to both comparator areas.

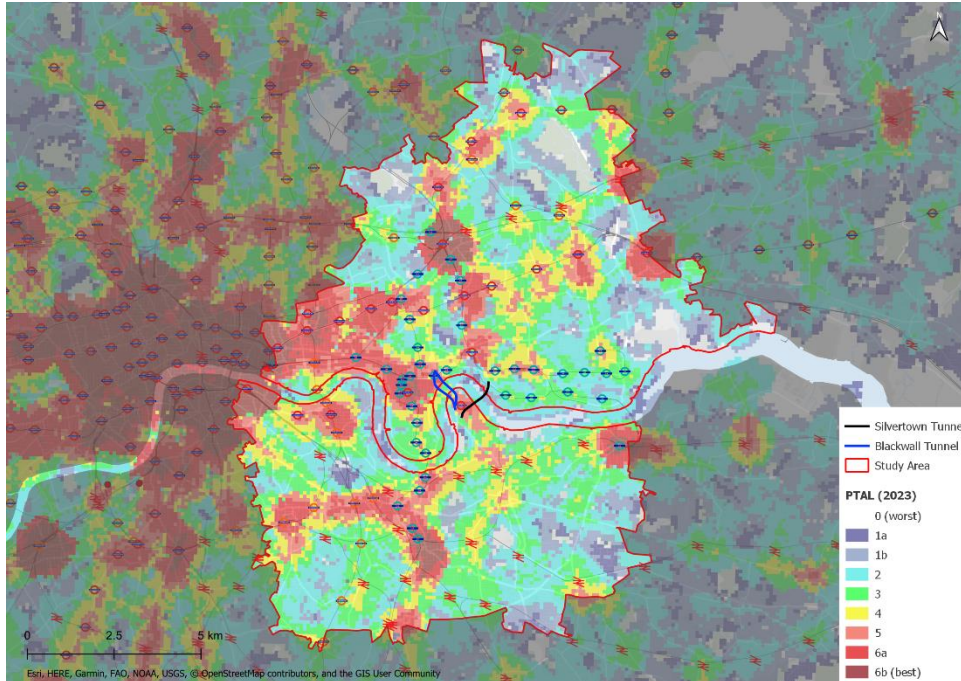
Travel Indicators

Public Transport Accessibility

- 3.54 The Public Transport Accessibility Level (PTAL) is a metric widely used by TfL to measure the accessibility of a certain point or area to the public transport network. This considers both walk access time to public transport stops and stations, and the number and frequency of public transport services serving those stops.
- 3.55 PTAL does not measure, for example, the connectivity to jobs or people that these public transport services might provide, or other characteristics such as service reliability, crowding or speed.
- 3.56 There are eight PTAL levels, ranging from 1a, or 'Low' (representing very poor accessibility), to 6b, or 'High' (representing excellent accessibility to public transport).

Figure 3.19 shows these levels across the study area. Areas with the highest levels are those near frequent rail or Tube stations. A combination of different rail services with bus routes, for example around transport interchanges (e.g. Stratford, Lewisham, Canada Water) creates larger areas in the highest two PTALs (6a and 6b).

Figure 3.19: Public Transport Accessibility Levels (PTAL), 2023



Source: Transport for London

- 3.57 On the other hand, areas with no frequent and reliable public transport nearby can be clearly identified (shown on the figure in blue colours), and are mostly concentrated to the north, east and southeast of the study area. The latest PTAL values have been calculated in 2023 by TfL and will be updated again in the future. However, bespoke updates to PTAL values in the study area resulting from the scheme (e.g. considering new bus services through the tunnel) could be calculated even without a wider update of London PTAL values.
- 3.58 The PTAL values used here are slightly different to those reported in the 2020 secondary data analysis, which was based on 2015 PTAL values. Between 2015 and 2023 there have been some improvements in public transport frequency and capacity, and the addition of the Elizabeth Line, increasing rail frequencies and capacity at several stations, which have improved PTAL values in some locations of the study area.
- 3.59 Some examples of increased PTAL values as a result of the opening of the Elizabeth Line can be found at Whitechapel, Canary Wharf, and Custom House. While the Elizabeth line also serves places like Stratford and Woolwich, areas around these stations already had the maximum PTAL level (6b) in 2015, and therefore this has been unchanged.
- 3.60 No appreciable reductions in PTAL have been observed in the study area.

Commuting patterns – Census travel to work data

- 3.61 The 2011 Census provides detailed and spatially disaggregated journey to work data regarding places of residence and work, as well as preferred commuting mode. Whilst this

data is only produced once every ten years and therefore is not suitable for the purposes of annual monitoring, it is useful for the purposes of establishing a general baseline narrative and understanding broad trends in commuting trips.

- 3.62 This has not been updated since the 2020 secondary data analysis report, as the published 2021 Census data referring to small area-based commuting patterns had not been published at the time of preparation of this report. However, given that the 2021 Census data was also collected during a period of mobility restrictions as a result of the coronavirus pandemic, this data might not be a reliable source even if available.
- 3.63 An example of this is the study of cross-river commuting flows. Figure 3.20 the distribution of residents who cross the river to work in the study area, including north-south and south-north movements, by place of residence, while Figure 3.21 shows the spatial distribution of cross-river commuters to the study area, by place of work.
- 3.64 Cross-river commutes are clearly dominated by south-north movements, with many more residents from south of the River Thames crossing the river to work than in the opposite direction. This is a consistent trend across London, mainly because the largest employment areas are located north of the river (for example the City of London, Westminster, Canary Wharf, Stratford).
- 3.65 In the particular case of the study area, cross-river commutes tend to originate (place of residence) in areas around stations of the Jubilee Line (London Bridge, Canada Water, North Greenwich) and the Docklands Light Railway (DLR) (Lewisham Greenwich), which have high levels of connectivity with the main employment attractors in the study area north of the river (Canary Wharf, Stratford). These river crossings are therefore likely to take place along the Rotherhithe-Isle of Dogs-Greenwich section of the Thames, although there will be others occurring further upstream.

Figure 3.20: Residents who cross the river to commute to the Study Area, by place of residence

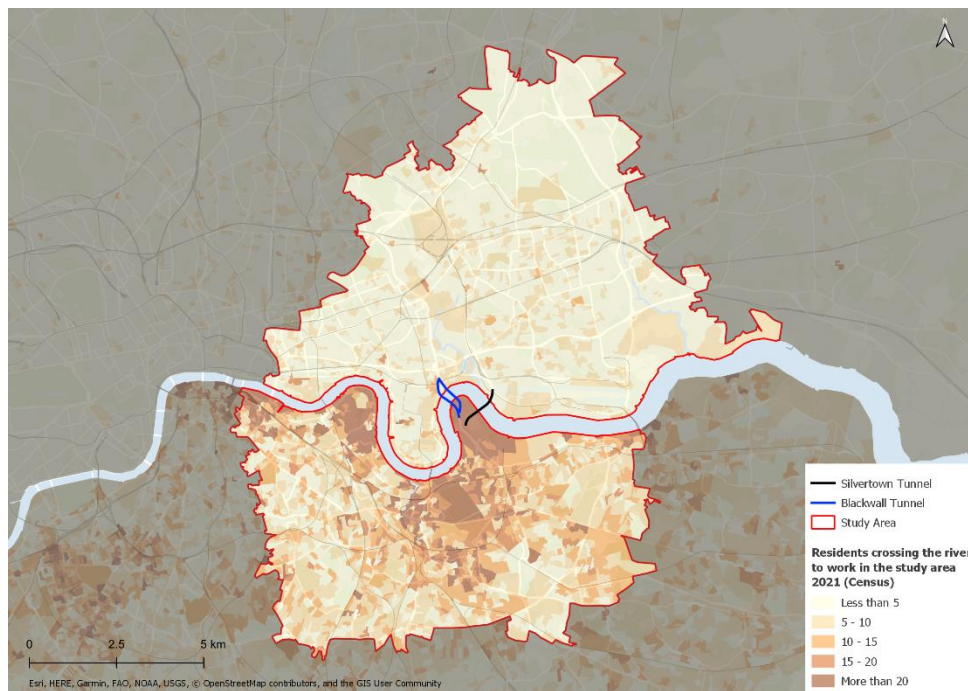
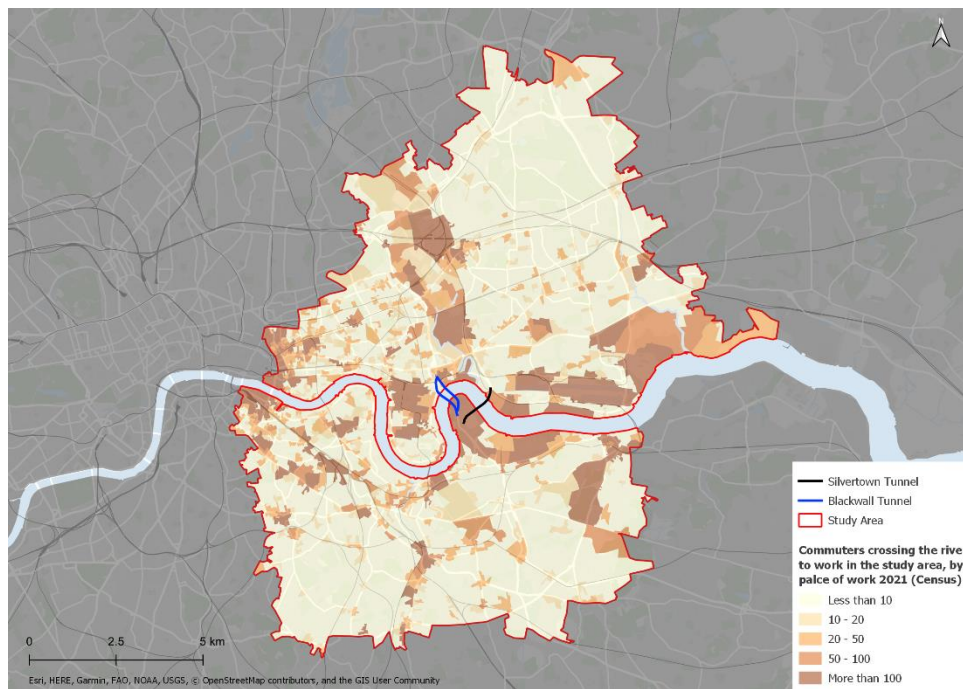


Figure 3.21: Commuters who cross the river to work in the Study Area, by place of work



LTDS – Transport context in the study area

- 3.66 The London Travel Demand Survey (LTDS) is updated annually by TfL and contains a wide range of travel information and indicators about trip stages, trips and the characteristics of people and households making those trips. TfL has provided LTDS analysis of the 2022/23 survey, by London borough, for Greater London and for the study area.
- 3.67 Although the LTDS dataset does not provide data by MSOA (or lower compatible area classifications), it uses a disaggregation system with zones of similar size, called LATS zones. It is therefore possible to select the LATS zones located partially or completely within the study area and use the combined area as a fair approximation of the actual study area. The discrepancies between the LATS-based area and the actual study area are minor compared with the whole extent of the study area and are deemed of little relevance for statistics for the area as a whole.
- 3.68 Due to sample size, it is not possible to use the LTDS data for a finer level of spatial disaggregation, as done with MSOA and LSOA for socio-economic indicators. However, sample size is large enough to extract aggregated statistics for the study area, and to compare it with comparator areas like Greater London.
- 3.69 In terms of total trips made by residents, the daily average (for a 7-day week) is 2.07 for Greater London and slightly lower in the study area (2.05), as shown in Table 3.6. The Mayor’s Transport Strategy has a target for 80% of all journeys to be made by walking, cycling or public transport by 2040; the LTDS data analysed here show this proportion to be at 73% in the study area compared to 67% across Greater London.
- 3.70 The main reason behind the differences in trip rates between the study area and London is the number of trips by private transport, which includes car, motorcycle, and taxi/private hire vehicles, which is significantly higher in the London average than in the study area of the scheme. Public transport and active mode use are higher in the study area.

Table 3.6: Trips per person (resident) per day, by mode (average for 7-day week, 2022/23)

| Mode | Trips per person | | Mode share | |
|------------------------------------|------------------|----------------|-------------|----------------|
| | Study area | Greater London | Study area | Greater London |
| Active modes (walking and cycling) | 0.958 | 0.875 | 46.7% | 42.2% |
| Private transport | 0.546 | 0.689 | 26.6% | 33.3% |
| Public transport | 0.548 | 0.507 | 26.7% | 24.5% |
| Total | 2.051 | 2.071 | 100% | 100% |

3.71 Access to a car or van in the household is an important indicator when analysing travel behaviours and patterns, as it will impact the mode share of residents in a certain area. Typically, the average number of cars available per household is lower in urban than in rural areas, due to higher densities, better public transport offer and shorter trip distances. It is the case that many households do not have a car available at all, as they rely on alternative travel modes.

3.72 Table 3.7 shows the distribution of households in the study area and in Greater London, classified by their access to a car or van. While London, due to its urban character and its large public transport offer, has a majority of households with no car or van available (46%), this pattern is even clearer in the study area, where 59% of households have no car or van and less than 7% of households have 2 or more.

Table 3.7: Household access to car/van (2022/23)

| Car availability | Study Area | Greater London |
|------------------|------------|----------------|
| No car | 58.6% | 45.6% |
| 1 car | 34.9% | 41.5% |
| 2 or more cars | 6.6% | 12.9% |

3.73 In terms of length of trips, the situation is similar in the study area and in Greater London, as shown in Table 3.8. Over half of all trips are shorter than 2 kilometres, with 70-75% under 5km. Only 3% (5% for Greater London) of all trips are longer than 20km.

Table 3.8: Distribution of weekly (7-day week) trips by distance band (2022/23)

| Distance band | Study Area | Greater London |
|----------------|------------|----------------|
| Less than 2km | 55.8% | 52.8% |
| 2 to 5km | 18.4% | 19.8% |
| 5 to 10km | 13.9% | 13.8% |
| 10 to 20km | 8.6% | 9.2% |
| 20 to 50km | 2.5% | 3.0% |
| more than 50km | 0.9% | 1.5% |

3.74 Another relevant metric to understand the transport context and the travel behaviour of the residents in the study area is the purpose of the trips. The several detailed purposes included in LTDS have been aggregated into six broader journey purposes: usual workplace, other work, leisure, personal business and shopping, education and other.

3.75 Table 3.9 shows the purpose split of weekly trips made by residents in the study area and Greater London. It can be seen that the purpose split is broadly similar, with commuting trips (to and from usual workplace) around 15% and leisure and shopping/personal business trips accounting for more than 50% of the trips combined.

Table 3.9: Trip purpose split by main purpose, residents (2022/23)

| Main purpose | Study Area | Greater London |
|--------------------------------|------------|----------------|
| Usual workplace | 13.9% | 14.4% |
| Other work | 5.6% | 6.2% |
| Leisure | 33.1% | 33.3% |
| Shopping and personal business | 21.6% | 22.0% |
| Education | 8.6% | 8.2% |
| Other | 17.2% | 15.9% |

3.76 There have been relatively small changes in the car/van accessibility figures in the study area and in Greater London between the previous secondary data analysis in 2020 (using 2017-2019 LTDS data) and the current report (using 2022/23 LTDS data). However, in both cases, the trend is towards lower vehicle accessibility, as households with no car/van have increased from 55% to 58.6% and from 44.3% to 45.6% in the study area and Greater London, respectively.

3.77 There have been larger changes to other travel patterns, mainly to mode and purpose splits. Consistent with wider transport trends across the city since the coronavirus pandemic, the study area has seen a marked increase in walking and cycling mode shares in between monitoring waves, with a decrease in public transport use and relatively stable use of private vehicles.

3.78 In terms of purpose splits, there has been an overall decline in commuting travel, reducing from 19% to 14% in the study area, and from 17% to 14% in Greater London, between secondary data waves. Leisure trips, on the other hand, have increased their share to 33% in both study area and Greater London, from previous levels of around 25-27% pre-pandemic. Other trip purposes (other work, shopping, education, personal business, etc) have maintained relatively constant shares.

4 Business Survey: Introduction

4.1 As part of the socio-economic monitoring for the Silvertown Tunnel, a sample of businesses in the surrounding area of the tunnel across southeast and east London were surveyed in order to understand their travel behaviours and highlight key issues faced by them. In the upcoming sections, the business survey findings from 2023 survey are compared to the 2021 data and pertinent findings are reported accordingly. Insights for subgroups are also presented where findings of interest have been found. Individual data figures from 2021 are not included in this report, however they will contribute to the overall baseline report that will describe the socio-economic conditions and changes prior to the tunnel opening.

- A total of 402 business interviews were achieved which was higher than the total number of interviews completed in 2021 (n=300). In addition, the 2021 data was supported by qualitative research in form of focus groups. Focus groups were not part of the 2023 monitoring.
- For consistency with the first data collection in 2021, the interviews were conducted via telephone by Qa Research in October and November 2023.
- The survey questionnaire is provided in Appendix A.
- The sampling approach and weighting scheme applied to the 2021 research was replicated in 2023. The methodology is described in detail in this section.
- In addition, ‘wave one’ or ‘year one’ as well as ‘wave two’ or ‘year two’ are used interchangeably when referring to the 2021 and 2023 findings respectively.
- Significance testing (at a 95% confidence interval meaning that there was a 95% chance the difference is not caused by the sample variation) was used to report on differences between waves. In such instances, the term ‘significant’ was generally used to refer to this threshold.

Sampling

4.2 The business sample framework was based on a dataset from Dun & Bradstreet (D&B), the commercial data and analytics company. All businesses registered in the UK are automatically enrolled within D&B’s database.

4.3 The dataset purchased for the 2023 research contained approximately 7,000 businesses situated across the study area including a mix of business types and sizes. Standard Industrial Classification (SIC) and number of employees using data on Business Counts available through NOMIS (available at local authority level or super output area – mid layer) were used as the basis for quota setting. The quota framework is shown in Table 4.1.

4.4 The sample was stratified by business type and size to ensure that businesses of a particular size or type were not overrepresented in the collected dataset. For consistency with the research undertaken for TfL in 2021, the following broad categories of business were used:

- Primary/manufacturing
- Construction
- Transport, Retail and Distribution (TRAD)
- Services – Public
- Services – Private

4.5 Private services are the largest category with almost 50% of businesses in the study area within this category. The D&B dataset allows this category to be subdivided as follows:

- Services – private sector – Financial and insurance, and Professional, scientific and technical
- Services – private sector – Other
- Services – private sector – Information and communication

4.6 In general, the distribution of business sectors in the study area is similar to the Greater London as a whole. A detailed breakdown is included in Table 4.1.

Weighting

4.7 The business survey was weighted for analysis, in order to ensure it reflected the profile of all businesses located in the survey area.

4.8 The business population data included within this document is drawn from NOMIS and based on a list of 144 Mid-layer Super Output Areas (MSOAs) across the nine London boroughs which form the target area. This is consistent with the approach undertaken in 2021.

Weighting approach by sector

4.9 Table 4.1 outlines the number of businesses within the target MSOAs by business type, alongside the unweighted and weighted sample (required to bring the final sample back in line with all businesses in the target area), as well as the distribution of business sectors in Greater London.

4.10 The quotas set on the survey mean that the weights required are not large, but would adjust for some over- and under-representation, for example, primary/manufacturing businesses.

Table 4.1: Study area business sector profile (unweighted and weighted sample and responses)

| Business Type Category | Businesses in target MSOAs (n) | Comparator area – Greater London (%) | Study area-unweighted sample (%) | Study area-unweighted responses (n) | Study area-weighted responses (n) | Study area - weighted sample (%) |
|--|--------------------------------|--------------------------------------|----------------------------------|-------------------------------------|-----------------------------------|----------------------------------|
| Primary/manufacturing | 2,070 | 2% | 4% | 18 | 14 | 3% |
| Construction | 6,060 | 12% | 5% | 19 | 39 | 10% |
| Transport, Retail and Distribution | 10,475 | 23% | 24% | 97 | 70 | 17% |
| Services – Public | 1,245 | 0% ¹ | 4% | 17 | 9 | 2% |
| Services – Private (Information and communication) | 9,390 | 12% | 4% | 17 | 61 | 15% |
| Services – Private (Financial & insurance; Professional, scientific & technical) | 14,090 | 23% | 23% | 92 | 93 | 23% |
| Services – Private (Administrative support services) | 6,295 | 9% | 8% | 32 | 41 | 10% |
| Services – Private (Other) | 11,190 | 19% | 27% | 110 | 76 | 19% |
| TOTAL | 60,815 | 100% | 100% | 402 | 402 | 100% |

Source: MSOAs, Business population per industry category across the nine London Boroughs surrounding the study area; Inter-Department Business Register (IDBR), 20223; TfL, Silvertown Tunnel socio-economic monitoring; Year 2

Weighting approach by business size

4.11 Similarly to wave one in 2021, the data was also weighted by business size to make the final data more representative of all businesses in the survey area. The answers given to the following question (S3) during the survey are compared to the business population data: “How many people currently work for the organisation as a whole (across all sites)?”

4.12 Business population data drawn from NOMIS is at ‘enterprise’ level, defined as:

The smallest combination of legal units (generally based on VAT and/or PAYE records) that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources.

¹ Please note that figure here includes the government services, such as public administration and defence, and is rounded to one decimal place.

- 4.13 The weights required are greater for business size, as the final sample over-represented small, and medium/ large sized businesses compared to micro businesses. Medium and large sized businesses have been combined to minimise the size of the weights required. The weights required are greater for business size, as the final sample over-represented small, and medium/ large sized businesses compared to micro businesses. Medium and large sized businesses have been combined to minimise the size of the weights required.
- 4.14 Table 4.2 outlines the number of businesses within the target MSOAs by business size, alongside the achieved sample and weighting factor required to bring the final sample back in line with all businesses in the target area.
- 4.15 The weights required are greater for business size, as the final sample over-represented small, and medium/ large sized businesses compared to micro businesses. Medium and large sized businesses have been combined to minimise the size of the weights required.

Table 4.2: Study area business size profile (unweighted and weighted sample and responses)

| Number of employees | Businesses in target MSOAs (n) | Comparator area – Greater London (%) | Study area-unweighted sample (%) | Study area-unweighted responses (n) | Study area-weighted responses (n) | Study area - weighted sample (%) |
|----------------------|--------------------------------|--------------------------------------|----------------------------------|-------------------------------------|-----------------------------------|----------------------------------|
| Micro (0 to 9) | 56,025 | 93% | 68% | 269 | 361 | 90% |
| Small (10 to 49) | 3,855 | 6% | 23% | 90 | 38 | 9% |
| Medium/ Large (50 +) | 940 | 1% | 9% | 35 | 3 | 1% |
| TOTAL | 60,815 | 100% | 100% | 394 | 402 | 100% |

Source: MSOAs, Business population per industry category across the nine London Boroughs surrounding the study area; Inter-Department Business Register (IDBR), 20223; TfL, Silvertown Tunnel socio-economic monitoring; Year 2 (All businesses except those who selected ‘Don’t know’).

5 Business Survey Findings: Business Profile

5.1 This section outlines the business profile in terms of location, sector and size. The overall breakdown was similar to the 2021 profile allowing for valid comparisons across the waves.

Location of businesses

5.2 Business locations are grouped into North and South of the Thames for the purposes of analysis. In terms of individual boroughs, the groupings were as follows:

- North of the Thames
 - Barking (base too small for individual analysis)
 - Hackney (base too small for individual analysis)
 - Newham
 - Redbridge (base too small for individual analysis)
 - Tower Hamlets
 - Waltham Forest (base too small for individual analysis)
- South of the Thames
 - Greenwich
 - Lewisham
 - Southwark

Business sector and size

5.3 Businesses surveyed are grouped into the following categories for the purposes of analysis:

- Primary/manufacturing (base too small for individual analysis)
- Construction (base size should be treated with caution)
- Transport, Retail and Distribution (TRAD)
- Services – Public (base too small for individual analysis)
- Services – Private

5.4 Due to the very low number of responses from business with 10+ employees, it has not been always possible to analyse data by business size.

5.5 The private service sector makes up the majority of businesses in the study area, as expected from the sampling frame. The overall breakdown is similar to the 2021 business profile, as seen in Table 5.1.

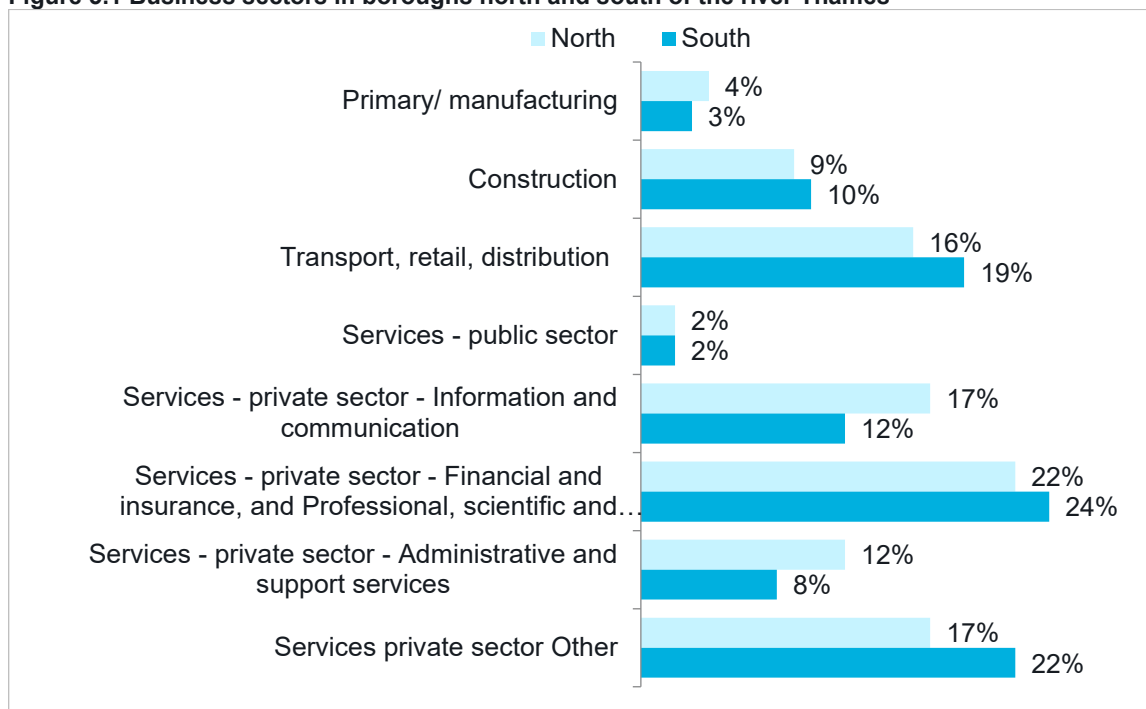
Table 5.1: Sample breakdown per business sector in 2021 and 2023

| Business sector | 2021 Weighted responses (n) | 2021 Sample breakdown (%) | 2023 Weighted responses (n) | 2023 Sample breakdown (%) |
|--|-----------------------------|---------------------------|-----------------------------|---------------------------|
| Primary/ manufacturing | 11 | 4% | 14 | 3% |
| Construction | 30 | 10% | 39 | 10% |
| Transport, retail, distribution (TRAD) | 52 | 17% | 70 | 17% |
| Services – public sector | 6 | 2% | 9 | 2% |
| Services – private sector – Information and communication | 46 | 15% | 61 | 15% |
| Services – private sector – Financial and insurance, and Professional, scientific and technical | 70 | 23% | 93 | 23% |
| Services – private sector – Administrative and support services | 31 | 10% | 41 | 10% |
| Services – private sector – Other | 55 | 18% | 76 | 19% |
| NET: Services – private sector | 202 | 68% | 271 | 67% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; S2: 'In which sector does your business operate?'; Year 1(n = 300) and Year 2 (n=402)

- 5.6 Figure 5.1 shows a detailed breakdown of the business sectors to the south and north side of the Thames. There is a slightly larger proportion of businesses operating in the Private sector on the north side of the river (68% vs 66% of business in the south of the Thames).
- 5.7 Out of the surveyed businesses, companies located in boroughs north of the Thames are more likely than those in the south to provide Information and Communication services as well as Administration, while businesses south of the river are more likely to deliver Financial and Professional services as well 'other' Private sector services.
- 5.8 TRAD businesses are more likely to be located in boroughs south of the river (19% vs 16% of those on the north side).

Figure 5.1 Business sectors in boroughs north and south of the river Thames



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; S2: 'In which sector does your business operate?'; Year 2 (n=402)

5.9 The vast majority (90%) of businesses responding to the survey have fewer than 10 employees across all sites. Businesses with more than one site were asked to consider a specific site within the study area for the remainder of the survey. In general, the size profile is very similar when considering only the specific sites included in the survey sample.

5.10 The 2023 figures are similar to the 2021 breakdowns.

Table 5.2: Number of respondents working across business sites

| Number of employees | Working across all sites | Working on a specific site within the study area on an average weekday |
|---------------------|--------------------------|--|
| 0-9 | 90% | 90% |
| 10-49 | 6% | 9% |
| 50-249 | 1% | 1% |
| 249+ | 0% | 0% |
| Don't know | 2% | 0% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; S3: 'How many people currently work for the organisation as a whole (across all sites)?', S4: 'How many people work regularly on this site on an average weekday?'; Year 2 (n=402)

5.11 The distribution is similar across sectors and locations with most business employing fewer than 50 people.

6 Business Survey Findings: Operations

6.1 This section sets out the surveyed businesses' operations in terms of customers (volumes, locations and transport modes used) and business trips and deliveries. When interpreting these findings, especially the benefits and drawbacks of their location, it should be recognised that business populations and activity in the study area will inevitably reflect the current provision of transport and cross river connectivity.

- In general, most businesses have clients/ customers based locally to the study area, in East or Southeast London and Greater London, although there is a slight increase in the share of visits from these places compared to the 2021 wave. Companies in TRAD are more likely than businesses in other sectors to receive visitors; one in three receive at least 100 customer visits each week.
- While car remains the most common transport method for customer visits – a marginal increase from 2021 – there is a small decrease in the number of companies using car for business trips compared to the 2021 findings. Businesses are also making slightly fewer trips compared to 2021.
- Seven in ten businesses receive at least one delivery in a typical week and their main suppliers are spread across London and the rest of the UK with over a quarter of businesses reporting 'other' locations. There is a slight drop in the number of businesses making at least one delivery per week compared to the 2021 findings.
- Proximity to customers remains the most commonly cited benefit of the business location while congestion was cited as the main disadvantage.

6.2 Commuting is considered in the residential survey report.

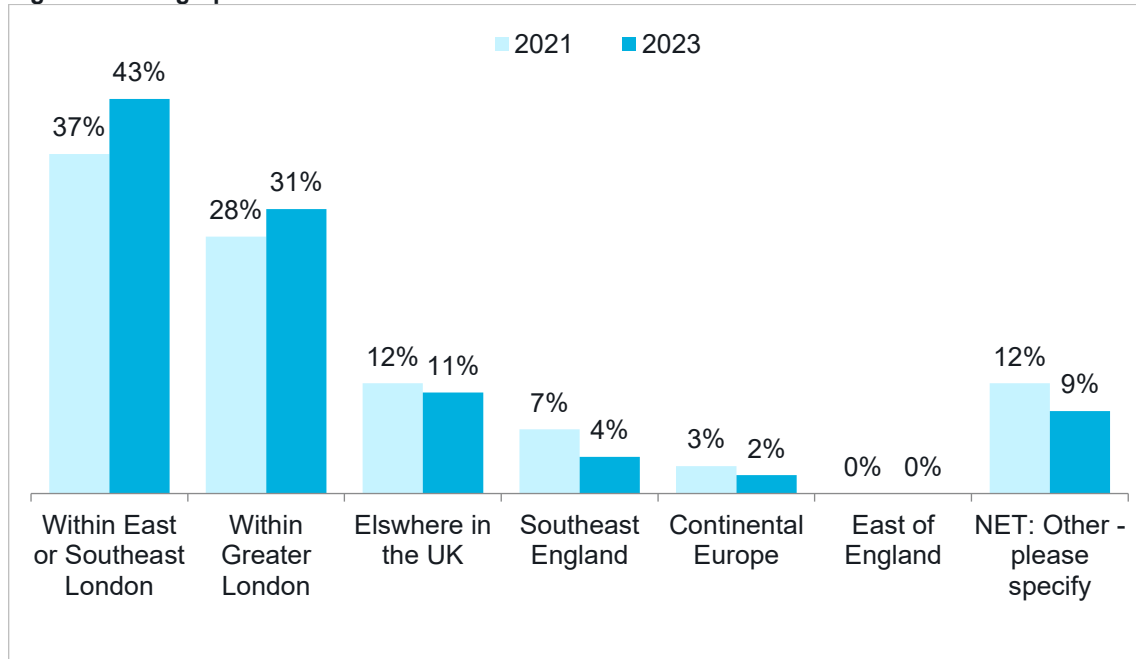
Customers

Customer locations

6.3 The majority (74%) of customers/ clients are based in close proximity to the study area, within East or Southeast London or Greater London, which is a nine-point increase from 65% in 2021. Consequently, fewer businesses reported having customers based in other locations compared to wave one.

6.4 The netted 'other' responses include mentions such as 'all over the world', 'all over the UK', 'online' and locations outside Europe.

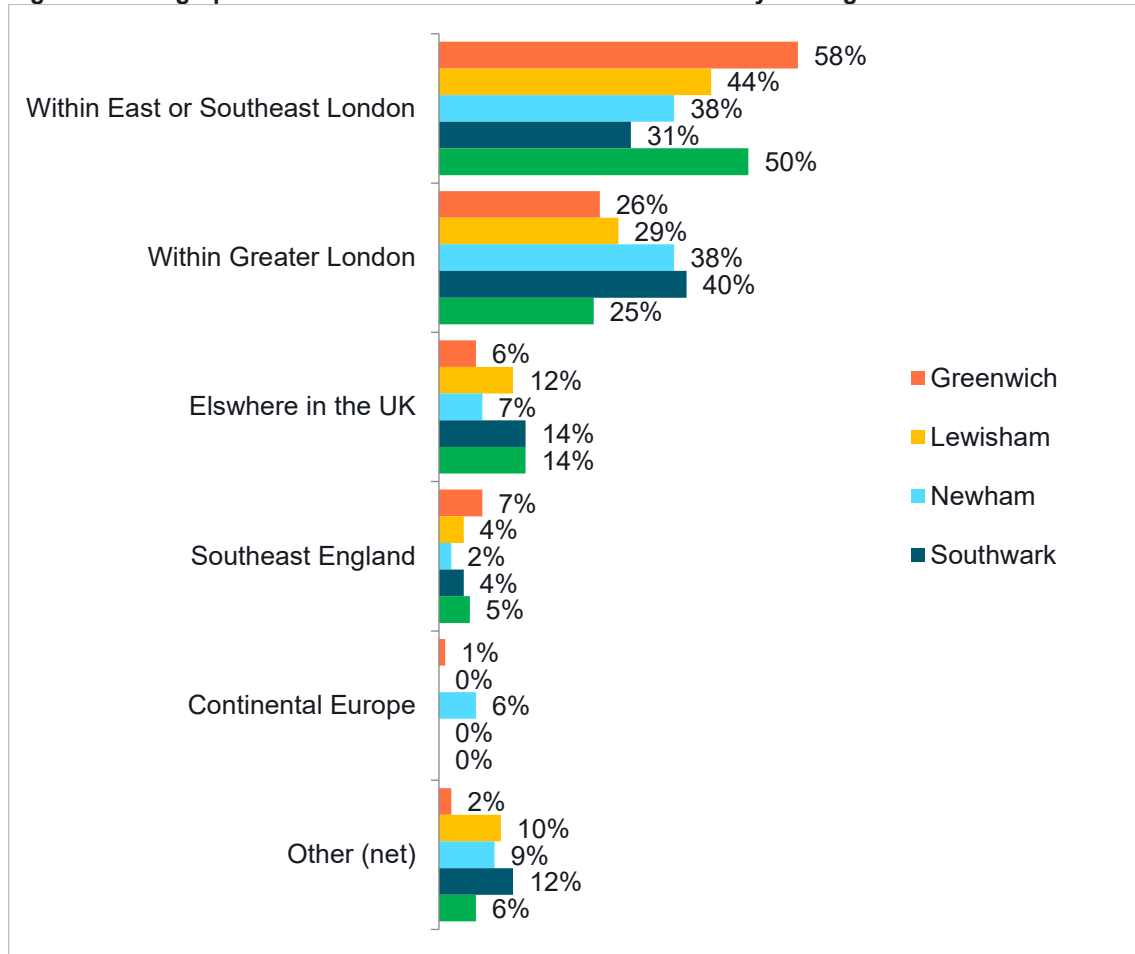
Figure 6.1 Geographic location of the main customers/ clients



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q21: 'Where are your main customers/ clients located? Please select all that apply'; Year 1 (n=300), Year 2 (n=402)

6.5 Businesses in Greenwich (58%), Tower Hamlets (50%) and Lewisham (44%) are more likely than average to report that their customers are based in East or Southeast London. Those in Southwark (40%) and Newham (38%), on the other hand, are more likely to have clients within Greater London (31% average). The detailed breakdown is shown in Figure 6.2.

Figure 6.2 Geographic location of the main customers/ clients – by borough



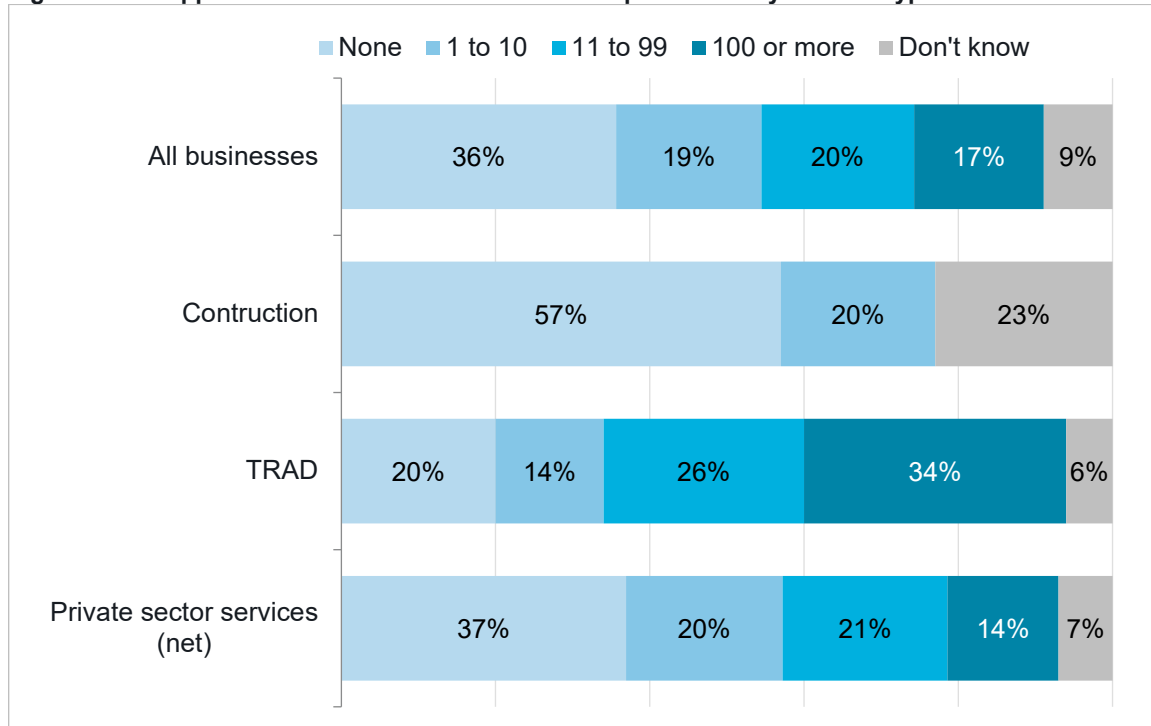
Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q21: 'Where are your main customers/ clients located? Please select all that apply'; Greenwich (n=56), Lewisham (n=58), Newham (n=75), Southwark (n=54), Tower Hamlets (n=88)

- 6.6 In terms of location of customers/clients, there is little difference between businesses based on the north and south side of the Thames.
- 6.7 There are, however, some variations when looking at the figures by sector:
- Construction businesses have a larger share of their customer base located in Greater London (49%) but much lower in East and Southeast London (25%).
 - This is the opposite for TRAD and sector services. Almost half of businesses in each of these sectors (47% and 46% respectively) reported having clients mainly from East and Southeast London. A further third of TRAD (33%) and a quarter of Private sector businesses (25%) have customers within Greater London.

Customer volumes

- 6.8 Over a third (36%) of businesses receive no customer visits at all. Of the remainder, 19% receive 1-10 visitors, 20% have 11-99 visits and 17% reported seeing 100 or more visitors per week.
- 6.9 There are no significant differences when comparing the figures with the 2021 findings.
- 6.10 TRAD businesses see more visitors than businesses in other sectors, including a third (34%) receiving at least 100 visitors each week.

Figure 6.3 An approximate number of customer visits per week – by a sector type



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q22: ‘Approximately how many customers/ clients visit your site each week?’; Year 2 (n=402), **Construction (n= 39)**, TRAD (n= 70), Private sector services (n=271). **Sample size is low and should be treated with caution.**

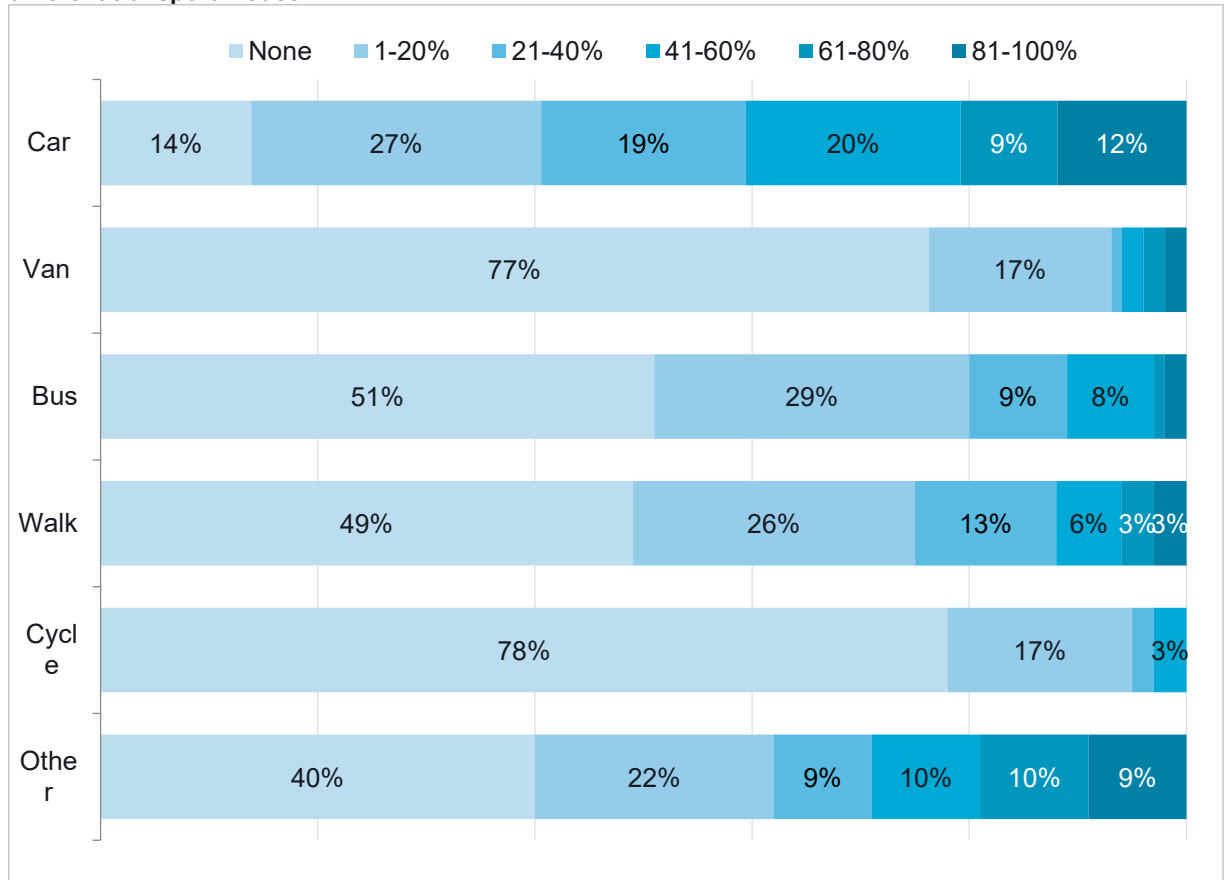
- 6.11 In terms of business size, companies with over 10 employees are more likely than the smallest businesses (0-9 staff members) to have visitors (67% vs 56% seeing at least one visit per week respectively).
- 6.12 Since the 0-9 employee businesses make up the majority of the surveyed sample, they share a similar profile as the average.
- 6.13 There are no significant differences across businesses north vs south of the Thames with over half (56%) of companies in each location receiving customer visits. Those located on the south side of the river are more likely to have 100+ visitors per week (20% vs 14% of business north of the river).

Customer mode use

- 6.14 This question was only asked to businesses that receive visitors, with ‘don’t know’ answers being excluded from analysis. In wave two, the question included additional answer options:
 - Cycle
 - Walk
 - Other (please specify)
- 6.15 Among businesses who receive visitors, the vast majority (87%) see customers travelling to their premises by car – an increase from 81% in 2021. A quarter (24%) see clients visiting by van, which is a significantly lower figure compared to 42% in wave one (in 2021).
- 6.16 Almost two thirds (60%) reported customers coming by ‘other’ transport modes, mainly public transport (e.g., Underground/ DLR, overground) or taxi.

6.17 Walking was mentioned by 51% and bus by 49%.

Figure 6.4 Estimated proportions of visitors/ customers travelling to business premises by different transport modes



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q9: ‘As a percentage, what proportions of visitors/ customers do you estimate travel to these premises by [mode]?’ Among those who have visitors and excluding “don’t know” answers’ (n=241)

6.18 Businesses in the north are more likely to have visitors coming by car or van, whereas those in the south are more likely to have visitors come by bus. Those on the south side are also more likely to see customers cycling or visiting their premises by public transport or a taxi. Walk has an equal share of responses across both locations.

Business customers: key changes compared to 2021

- An increase in the share of customers based in East or Southeast London (43%, up from 37%) and Greater London (31%, from 28%) and decreases in all other locations.
- No significant changes in customer volumes.
- An increase in the share of customer visits by car (87%, up from 81%) and a drop in the number of visits by van (24%, down from 42%).

Business trips

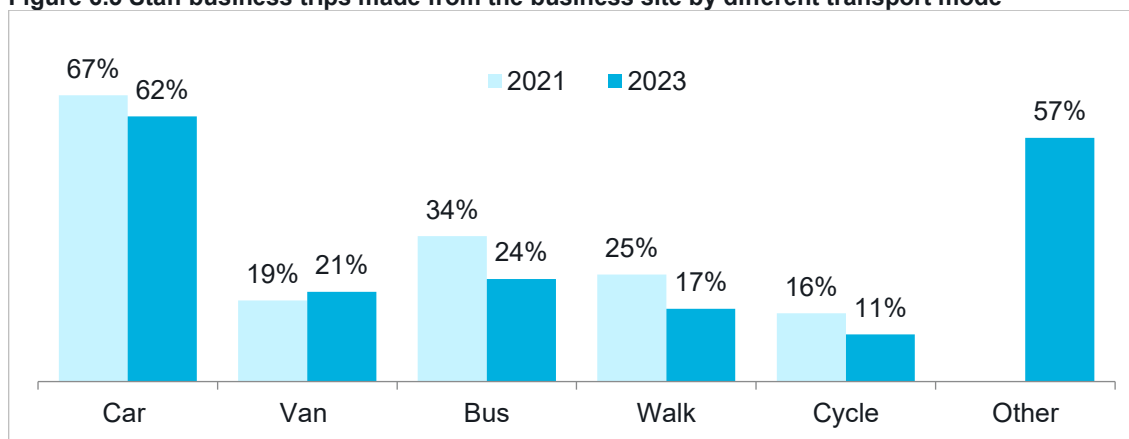
Business trip volumes

- 6.19 Almost two-fifths of businesses surveyed (39%) reported no business trips departing from their site each week. Compared to wave one, the number of businesses making at least one business trip per week in 2023 was lower (57% vs 63% in 2021).
- 6.20 Among those who make business journeys, over two in five (42%) reported between 1 and 10 trips and over one in ten (14%) between 11 and 99 trips per week. Only four businesses (less than 1%) stated 100 or more trips per week.
- 6.21 Across the sectors, Construction businesses tend to make more trips. Over two-fifths of businesses in TRAD (42%) and Private sector (41%) do not make any trips, and those who do report making trips typically make between 1 and 10 trips per week (37% in TRAD and 42% in Private sector).
- 6.22 In Construction, less than one in five (18%) businesses make no trips, nearly half (48%) report making between 1 and 10 journeys per week and 27% take more than 10 trips.
- 6.23 In terms of location, over half of businesses south and north (57% each) make at least one business trip per week. Businesses on the north side make slightly more trips, 39% make 1-10 journeys per week compared to 45% of those on the south side and those north of the Thames are more likely to make 11-99 trips per week (16% vs 12% of businesses in south).

Business trip mode use

- 6.1 Among those who make business trips, car remains the most common choice of transport although reported by fewer businesses than in 2021, as seen in Figure 6.5.
- 6.2 All other transport modes, except a van, also saw a decrease compared to wave one. The largest drop has been noted for bus (from 34% in 2021 to 24% in 2023).
- 6.3 In wave two, an 'other' answer option was added to the question. It was chosen by 57% of businesses and included mentions such as 'overground train' or 'underground or tube', 'motorcycle' and 'cable car'.

Figure 6.5 Staff business trips made from the business site by different transport mode

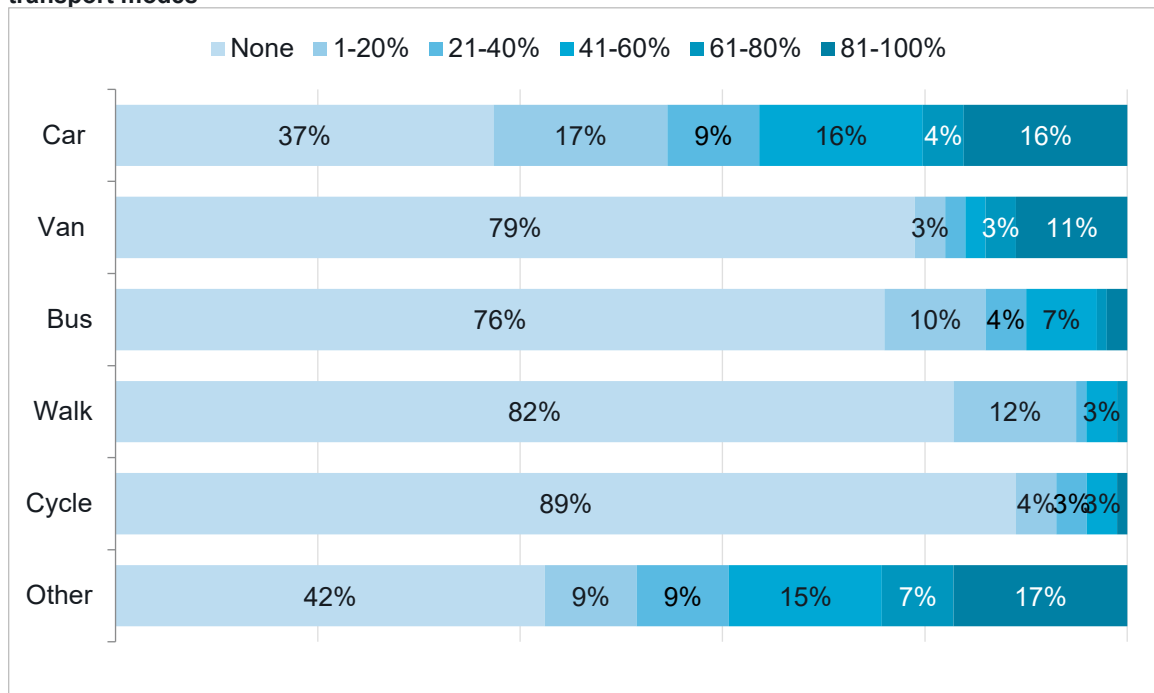


Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q11: 'As a percentage, what proportion of staff business trips from this site do you estimate are made by [mode]?' Among those who have make trips and excluding "don't know" answers'; Year 1(n= 216), Year 2 (n=298)

6.4 Figure 6.6 shows a breakdown of estimated proportions of trips made by different modes. Trips made by car and 'other' transport have a similar distribution of estimated proportions.

6.5 Those who make trips by van tend to use it for the majority (81% +) of business journeys.

Figure 6.6 Estimated proportions of staff business trips from the business site made by different transport modes



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q11: 'As a percentage, what proportion of staff business trips from this site do you estimate are made by [mode]?' Among those who make business trips and excluding "don't know" answers' (n=298)

6.6 There is little variation in shares of businesses on both sides of the Thames using a car or van. For other transport choices, those in the north are more likely to use bus or 'other' transport modes compared to businesses in south, whereas those south of the river are more likely to choose cycling.

Business trips: key changes compared to 2021

- The number of businesses making at least one trip per week was lower (57% vs 63% in 2021).
- Car use for business trips is slightly lower (62% vs 67% in 2021), as are all other transport modes except for vans which remained relatively unchanged (21% vs 19% in 2021).

Suppliers and deliveries to site

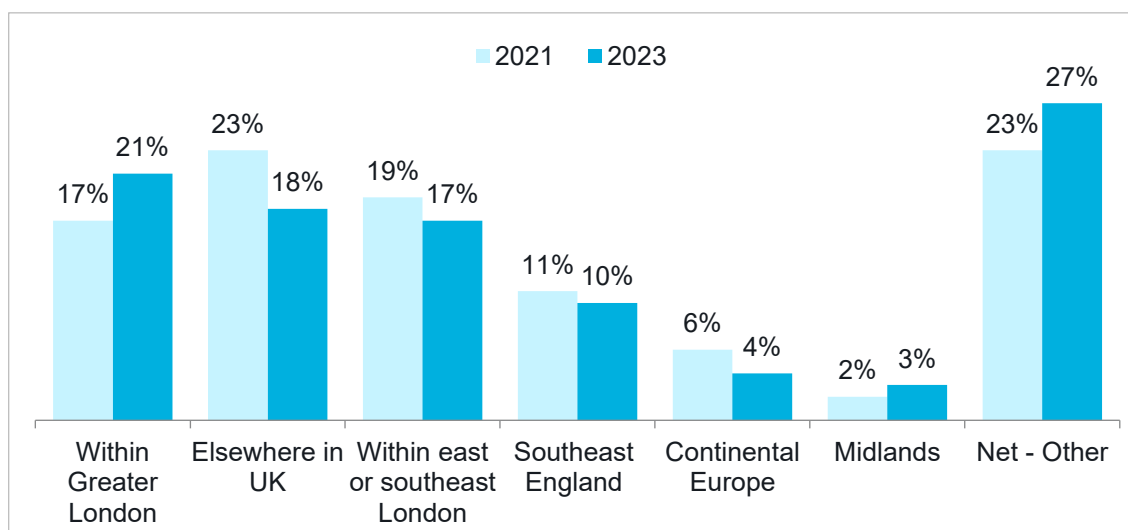
Delivery volumes - in

- 6.7 Most businesses (71%) receive at least one delivery per week, with 1-10 deliveries being the most commonly estimated volume (reported by 54%). Only 1% have more than 100 deliveries. The general distribution is similar to the 2021 profile.
- 6.8 Businesses in the north are more likely to receive 1-10 deliveries compared to those in the south (56% vs 50% respectively), whereas those in the south are slightly more likely to have 11-99 deliveries per week (18% vs 15% of those in north).
- 6.9 TRAD businesses (86%) are the most likely to receive at least one delivery per week, with over a third receiving 11-99 deliveries and over half (51%) seeing 1-10 deliveries each week.
- 6.10 Construction and Private sector companies typically receive 1-10 deliveries (reported by 59% and 53% respectively).

Supplier locations

- 6.11 A third of businesses mentioned having suppliers based in 'other' locations, which includes mentions outside of Europe or 'online', and a further fifth in Greater London. These are also the only locations that saw an increase compared to wave one, as seen in Figure 6.7
- 6.12 Almost a fifth of businesses stated that their suppliers are somewhere else in the UK (but not in London or SE or Midlands) or within East or Southeast London (18% and 17% respectively).
- 6.13 Only two business respondents stated East of England as their suppliers' locations (too low base to display in the chart).

Figure 6.7 Locations where main suppliers are based



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q17: 'Where are your main suppliers located?'; Year 1 (n= 300); Year 2 (n= 402)

- 6.14 Construction businesses tend to have their suppliers based in East or Southeast London (31%), fewer businesses stated Southeast England (24%) and Greater London (20%) as the main locations. TRAD's suppliers are almost evenly split between Greater London

(23%) and East or Southeast London (20%), whereas Private sector companies are most likely to report Greater London as their main suppliers' base (22%).

- 6.15 In terms of location, 'other' location is the most common answer given by businesses on both sides of the river (28% of those in the north and 25% in the south). Additionally, businesses in the north have suppliers in Greater London (23%), whereas businesses in the south are more likely to have them based in East or Southeast London (22%) or Greater London (19%).

Delivery volumes - out

- 6.16 Most businesses have no deliveries leaving their site each week – this is a five-point increase from 60% in wave one (in 2021) to 65% in 2023.
- 6.17 A fifth (19%) make between 1 and 10 deliveries (compared to 24% in 2021), while just 3% report making 100 or more (a one percent increase from last wave). The highest delivery volume mentioned is 1400 per week.
- 6.18 Businesses in the north tend to make more deliveries (70% vs 62% of those in the south stating no deliveries leave their site). They are also significantly more likely to report 1-10 deliveries per week compared to those in the south (24% vs 13% respectively).
- 6.19 Private sector businesses are the least likely to make any deliveries (77% report having no deliveries at all), followed by those in Construction (58%). The majority (59%) of TRAD businesses make at least one delivery per week, with a volume of 1-10 deliveries per week being the most common (stated by 30% of companies).
- 6.20 Naturally, the smallest (0-9 employees) businesses make fewer weekly deliveries than larger companies (with 10+ staff).

Business suppliers and deliveries to site: key changes compared to 2021

- There is little change in the share of businesses receiving deliveries, or the volumes received.
- There is an increase in the share of businesses saying their main suppliers are elsewhere in Greater London (21%, vs 17% in 2021) and a decrease in the share saying "Elsewhere in the UK" (18%, vs 23%).
- More businesses than in 2021 have no deliveries leaving in a typical week (65%, vs 60% in 2021) and fewer have between 1 and 10 deliveries per week (19%, vs 24% in 2021).

Overall trip types by businesses

- 6.21 Looking at all trips originating from the business, it is possible to see how the profile of trips varies across businesses. This is summarised in Table 6.1
- 6.22 A combination of receiving visitors and making business trips and deliveries in is the most popular across all surveyed businesses. This is different to the 2021 findings, when the combination of the same trips plus deliveries out (goods out) was most commonly stated.

- 6.23 A grouping of visitors, business trips and deliveries is common across both locations, in particular to the south of the Thames. However, the same combination of trips plus deliveries out (goods out) is also very popular among businesses to the north of the Thames.
- 6.24 There are some differences across sectors. TRAD businesses are most likely to have visitors, business trips, deliveries in and out (33%), while Private sector services tend to have visitors, business trips and deliveries in (24%). Construction businesses, on the other hand, typically report making only business trips (23%).

Table 6.1: Summary of trip type combinations

| Summary of trips | All businesses in 2021 | All businesses in 2023 | Businesses in north in 2023 | Businesses in south in 2023 |
|--|------------------------|------------------------|-----------------------------|-----------------------------|
| No trips | 6% | 3% | 5% | 2% |
| Visitors, Business Trips, Deliveries in | 14% | 19% | 17% | 22% |
| Visitors, Business Trips, Deliveries in, Goods out | 19% | 16% | 17% | 16% |
| Business Trips | 11% | 13% | 13% | 14% |
| Business Trips, Deliveries in | 12% | 10% | 10% | 9% |
| Visitors, Deliveries in | 7% | 8% | 9% | 8% |
| Visitors, Business Trips | 7% | 8% | 6% | 10% |
| Business Trips, Deliveries in, Goods out | 7% | 7% | 10% | 3% |
| Deliveries in | 4% | 5% | 4% | 7% |
| Visitors | 3% | 4% | 3% | 4% |
| Visitors, Deliveries in, Goods out | 5% | 4% | 4% | 4% |
| Deliveries in, Goods out | 2% | 1% | 1% | 1% |
| Visitors, Business Trips, Goods out | 0% | 1% | 0% | 1% |
| Goods out | 1% | 1% | 1% | 0% |
| Business Trips, Goods out | 1% | 0% | 0% | 0% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q9. As a percentage, what proportion of visitors/customers do you estimate travel to these premises by [mode]; Q11. As a percentage, what proportion of staff business trips from this site do you estimate are made by [mode]; Q16. How many deliveries do you receive at this site each week? Q19. How many goods-out/deliveries leave your site each week'; Year 1 (n= 300); Year 2 (n= 402, including n=233 businesses in the north side and n=169 in the south side of the river)

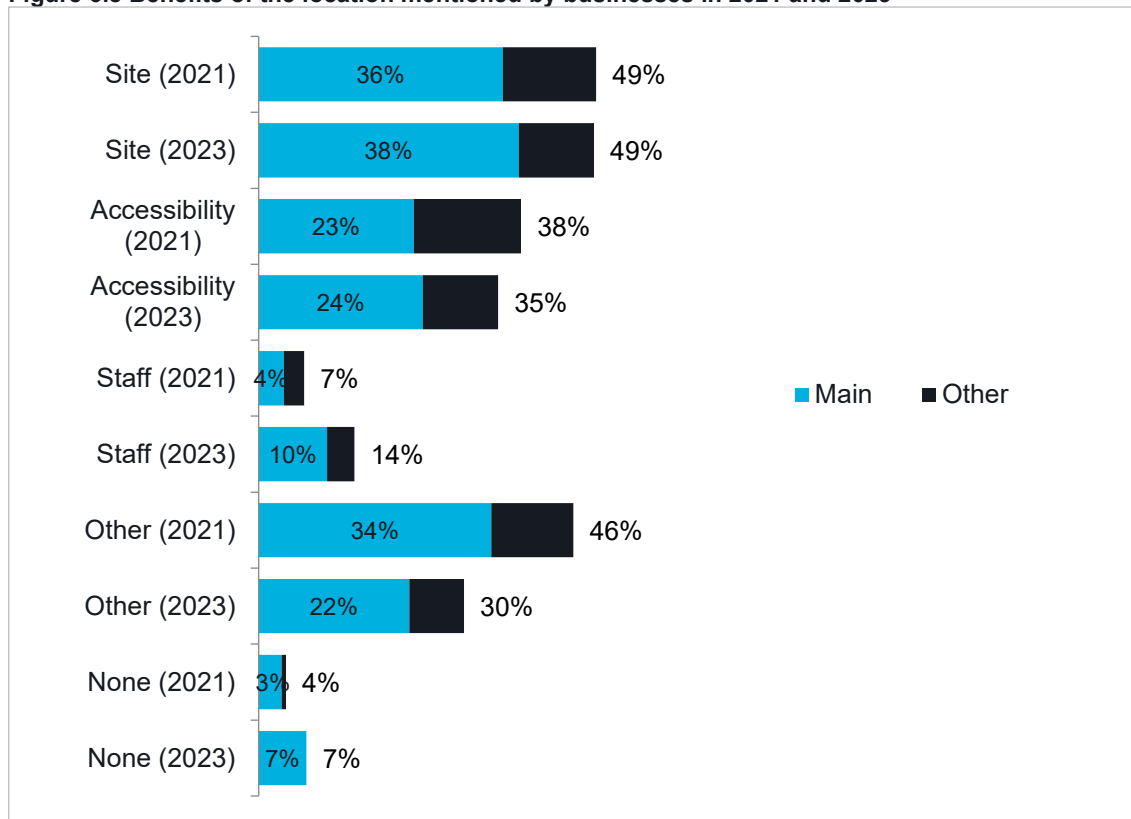
Location

Location benefits

- 6.25 The benefits of being located at the site have been grouped under the following main headings: site, accessibility, staff and 'other'. Reasons relating to the site account for around half of mentions, followed by over a third reporting accessibility. An additional third mentioned 'other' benefits - a significantly lower figure compared to wave one – while 14% reported 'staff' which has doubled from 7% in 2021. The detailed breakdown is shown in Figure 6.8.

- 6.26 It is worth noting that this wave is part of the baseline monitoring, pre-tunnel opening, and that it is reasonable to assume that the future existence of the tunnel has not been a major factor in businesses' decisions to locate themselves where they are. Similarly, the 'barrier' presented by the river is not likely to have been a sufficient reason for these businesses to have chosen to locate somewhere else.
- 6.27 Among the site related benefits, proximity to customers was the most commonly reported answer and stated by a higher proportion of businesses compared to wave one (29% vs 22% in 2021). Proximity to other businesses was less frequently mentioned but also saw an uptick, from 1% in 2021 to 4% in 2023. Perhaps not surprisingly, given the economic situation, 'affordability' is no longer reported as one of the main benefits and significantly fewer businesses mentioned it in 2023 (3% vs 7% in 2021).
- 6.28 In terms of accessibility, easy access by rail (13%) and road (10%) are the most commonly reported benefits. Ease of access to Central London saw a significant drop compared to wave one and was stated by only 2% of businesses in 2023 (vs 11% in 2021).
- 6.29 Among the staff related benefits, 'accessibility to staff' was mentioned by one in ten (10%) businesses and was twice as high as the 2021 figure (4%).

Figure 6.8 Benefits of the location mentioned by businesses in 2021 and 2023



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q6. 'What are the main benefits of being located at this site? Please state all that apply'; Q7. 'And of those, which is the main reason you are located here?'; Year 1 (n= 300); Year 2 (n= 402)

- 6.30 By location, easy access by rail is more likely to be cited by businesses in the north than in the south (14% vs 10% respectively) and so is proximity to other businesses in the same sector (5% vs 1% of those located in the south). Otherwise the pattern of answers

was similar across businesses surveyed in areas to the north and the south of the Thames.

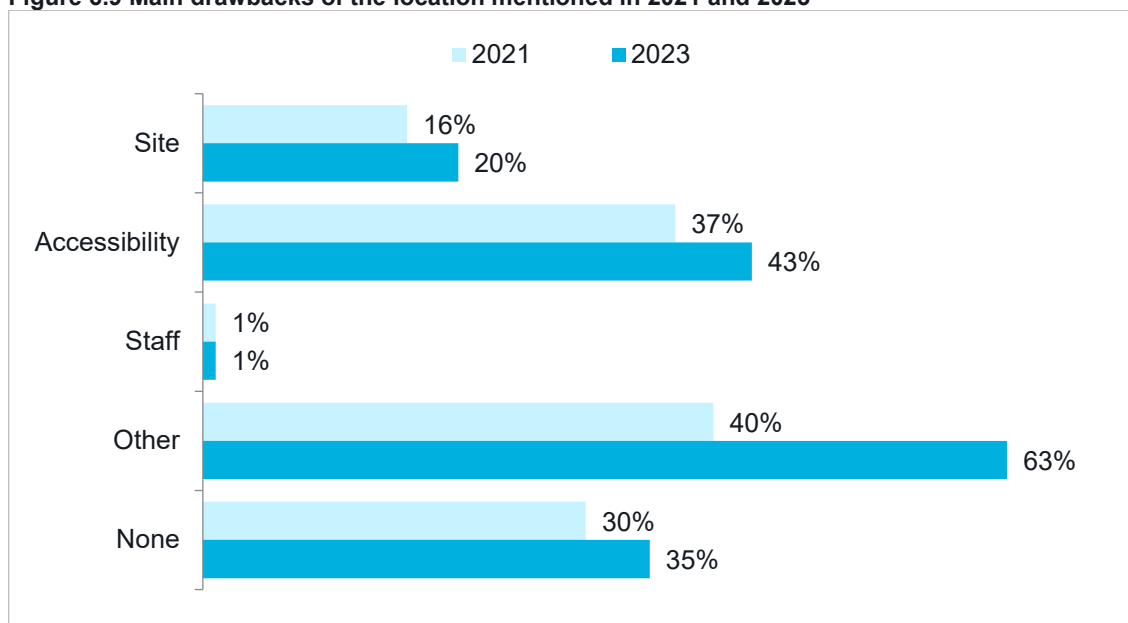
6.31 Proximity to customers is the most commonly stated benefit across all sectors. Private sector businesses are more likely than others to cite easy access by rail (15% vs 13% average), whereas businesses in the Construction sector are more likely to mention easy access by road (15% vs 9% average).

Location drawbacks

6.32 As with benefits, the drawbacks cited by businesses of their current location have been grouped into the main themes: site, accessibility, staff and ‘other’. The general distribution of answers is similar to the 2021 breakdown with the exception being the ‘other’ category seeing a significant increase compared to wave one. It is also the largest share of responses (63%), including mentions of ‘insufficient and expensive parking’ (16% of those saying ‘other’) being the most commonly cited answer.

6.33 Under the site category, affordability of premises (6%) and proximity to customers (5%) were the most popular mentions. Congestion (21%) was by far the most common one under the accessibility grouping.

Figure 6.9 Main drawbacks of the location mentioned in 2021 and 2023



Source: TfL, Silvertown Tunnel socio-economic monitoring; Q8. ‘What are the main drawbacks of being located at this site?? Please state all that apply’; Year 1 (n= 300); Year 2 (n= 402)

6.34 Generally, there is a similar distribution of responses across businesses in the north and the south boroughs. However, congestion is more likely to be cited by businesses in the north than in the south (22% vs 18% respectively). Businesses located to the south of the Thames on the other hand, are slightly more likely to state difficulty of access by road as the location disadvantage (13% vs 10% in the north). Insufficient and expensive parking was another commonly cited issue with an even split of responses across both areas to the north and south of the Thames (16% each).

Business location: key changes compared to 2021

- Proximity to customers and to staff are the location benefits that have seen the biggest increase since 2021, from 22% to 29% and from 7% to 14% respectively. Ease of access to Central London dropped from 11% to 2% and affordability dropped from 7% to 3%
- Most location drawbacks are selected by a higher share of businesses than in 2021, for example Accessibility from 37% to 43%, and Site from 16% to 20%. 'Other' has increased as the most common location drawback, from 40% to 63% with 16% of these mentioning 'insufficient and expensive parking'.

7 Business Survey Findings Performance and Outlook

7.1 This section considers how employee numbers have changed over the past year, as well as the recruitment and relocation circumstances of business respondents. It also looks at issues with deliveries and ease of access. Since wave one took place at the back end of the pandemic and associated restrictions, noticeable differences compared to the 2021 findings can be expected.

- The majority of businesses reported no change in workforce size in the last year. Of those who did, more have increased rather than reduced the number of employees working on their site. This is the opposite of the 2021 findings, when more businesses were reporting reductions than increases in workforces - a change likely attributable to the pandemic.
- Fewer businesses expect to relocate in the next year and fewer companies have experienced issues with deliveries compared to 2021. However, among those who have had problems with deliveries, parking and congestion locally remain the main factors affecting them.
- In term of accessibility to customers and markets, the former is deemed to be more important to businesses, with a larger proportion of companies saying is 'very' or 'slightly' compared to 2021.

Employee numbers and recruitment

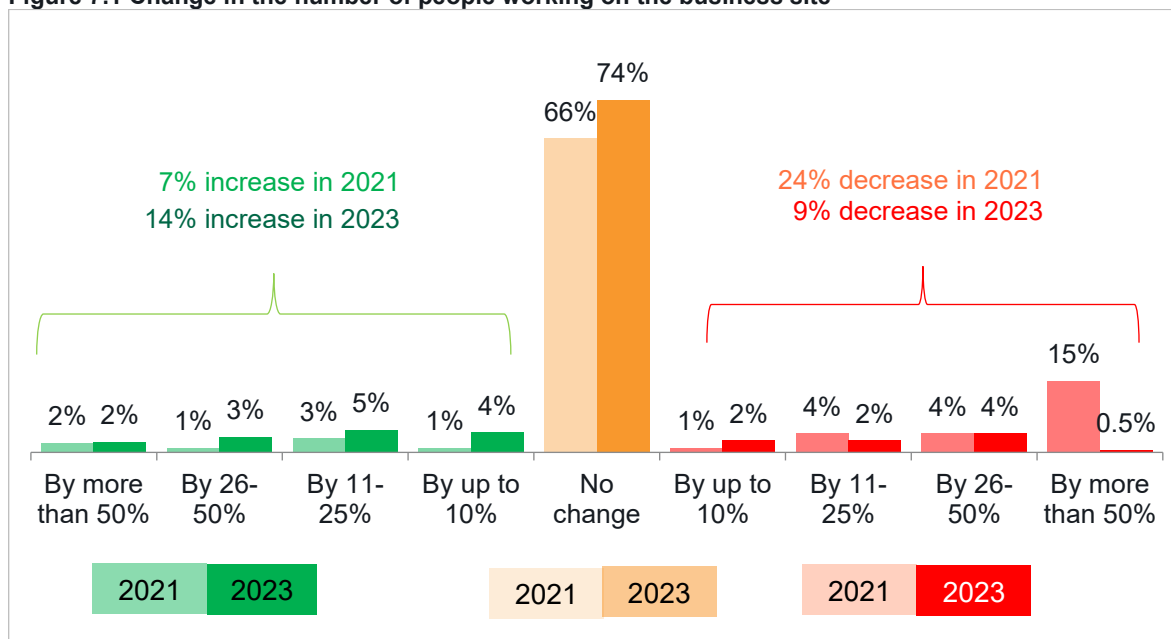
Change in employment

7.2 As seen in Figure 7.1, the majority of businesses have seen no change in workforce. Among those who report any shift, a significantly larger proportion increased rather than reduced the number of staff in 2023. However, these are not large increases with the most common increase being one of less than 25% of workforce.

7.3 There is a significant drop in the share of businesses reporting a reduction of employees by more than 50% compared to wave one, which could have been attributed to the impact of the pandemic. In addition, significantly more businesses report increasing or no change in workforce compared to 2021.

7.4 It should be noted that there is not sufficient sample to provide more detailed analysis beyond the earlier specified subgroups. However, results from 2021 and 2023 will be combined with findings from the upcoming wave in autumn 2024 and such analysis will be possible then.

Figure 7.1 Change in the number of people working on the business site



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q1a/b: 'In the last year approximately how has the number of people working on site changed?'; Year 1 (n= 300); Year 2 (n= 402)

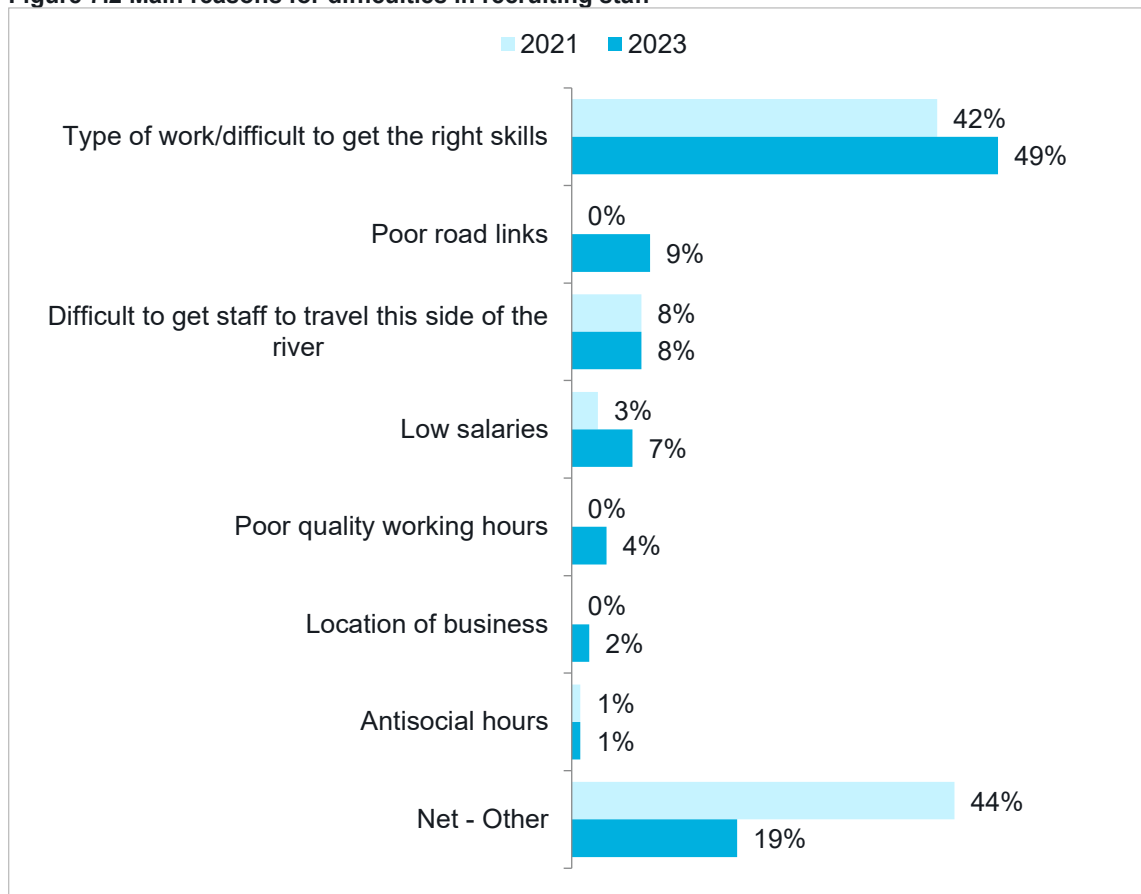
- 7.5 There is a similar breakdown of responses across businesses on the north and south side of the river. However, a reduction in staff is slightly more likely to be reported by those in the north than in the south (12% vs 8% respectively), whereas no change in workforce is stated by a larger share of businesses in the south (76% vs 72% in the north).
- 7.6 There is some variation across business sectors. Specifically, Construction is more likely than others to employ more people now (24% vs 15% average), whereas TRAD is more likely to have reduced the number of staff (15% vs 11% average).
- 7.7 In terms of business size, the smallest companies (with less than 10 employees) are more likely to report no change in staffing compared to larger (10+ employees) businesses (77% vs 51%). These, on the other hand, are more likely to have increased their workforce in the last year (31% vs 13% of those with 0-9 employees).

Staff recruitment

- 7.8 In general, there are fewer businesses that have recruited or are currently recruiting than those who have not been hiring staff (30% vs 69% respectively). However, when compared to 2021, the share of businesses recruiting has gone up by six points from 24% in wave one.
- 7.9 There are no significant variations across businesses in south and north boroughs.
- 7.10 TRAD (24%) and Private sector (18%) businesses are more likely than others (12%) to state that they have been recruiting in the last year, whereas those in Construction are more likely to say they are hiring now (18% vs 12% average).
- 7.11 Among those recruiting, most businesses have been trying to fill between one to three roles. Companies are also more likely to report that it has been easy (45%) rather than difficult (25%) to recruit for positions. There are no significant discrepancies in the distribution of responses across wave one and two.

- 7.12 In terms of location, those in north boroughs are significantly more likely to say that hiring was not easy (31% vs 16% of those in south), whereas those in the south are more likely to report the process as average (30% vs 23% in north).
- 7.13 The base sizes are too small to provide robust analysis by business sector or size.
- 7.14 As shown in Figure 7.2, the most commonly mentioned reasons for the difficulty in recruitment are:
 - Type of work/ difficult to get the right skills
 - ‘Other’ mentions include, for instance, general lack of applications or no candidates with the right personal qualities

Figure 7.2 Main reasons for difficulties in recruiting staff



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q5: ‘What do you see as the main reason for any difficulty filling positions at this site?’; Year 1 (n= 29); Year 2 (n= 47). **Sample sizes are low and should be treated with caution**

- 7.15 There are too few responses when splitting by business size, sector, or location to look at differences by these subgroups.

Relocations

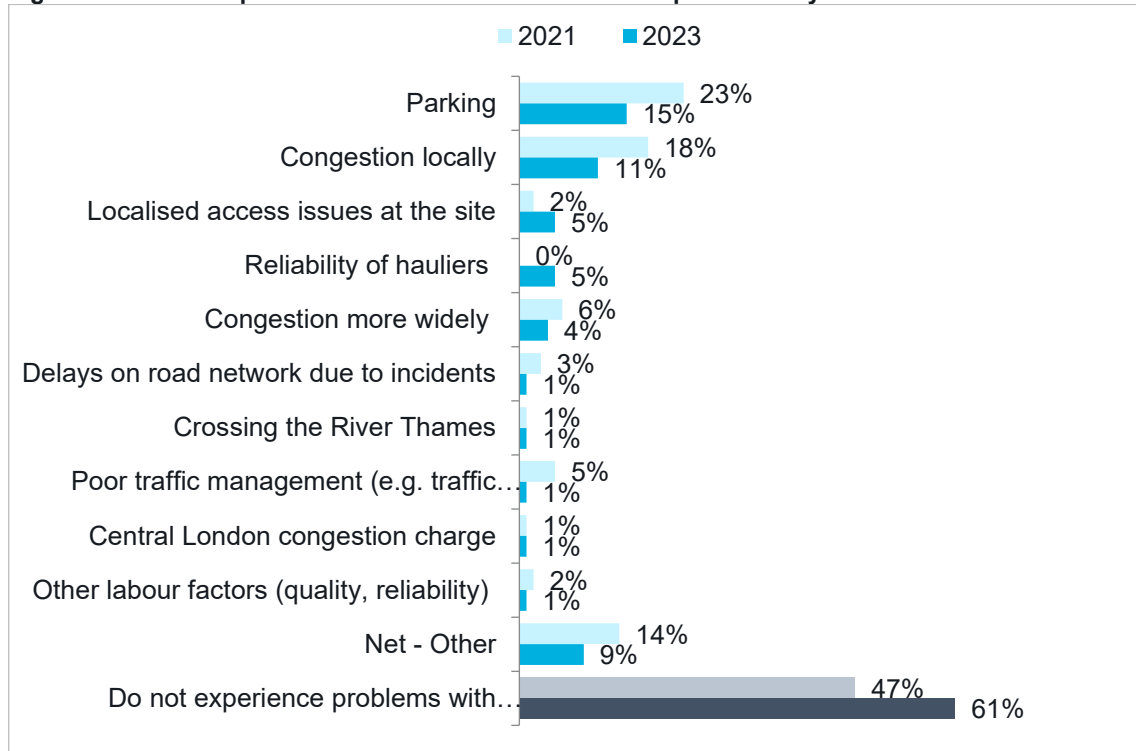
- 7.16 The vast majority (88%) of businesses do not expect to move from this site in the next year – a significant increase from 82% in 2021. 8% of surveyed businesses expect to move and only 4% stated that they do not know.
- 7.17 There are few differences between businesses in the north and the south.

- 7.18 Businesses in TRAD (16%) and Construction (12%) are more likely than those in Private sector (6%) to move in the year.
- 7.19 The most cited reasons for moving are:
- Needing smaller or larger premises (12 responses)
 - Requiring somewhere cheaper (8 responses)
 - Needing to be in a more accessible location (6 responses)
- 7.20 Of those businesses who are planning to relocate, a slightly larger share expect to find suitable premises within south/east London (50% vs 45% who say they would not expect to be able to).
- 7.21 While based on a small number of responses (15), the reasons it is felt to be difficult to find suitable premises in the area include:
- Lack of suitable premises
 - Cost of premises too high
- 7.22 There are too few responses to provide analysis by business size, sector, or location.

Issues with deliveries

- 7.23 The majority of businesses reported no issues with deliveries to their site – this is a significant increase compared to 2021, when it could have been impacted by the pandemic and associated restrictions. Those who have experienced problems accounted for 39%, with parking and local congestion being the most commonly cited answers.
- 7.24 In general, smaller shares of businesses stated parking and congestion locally as the main issues with deliveries compared to wave one. The detailed breakdown is shown in Figure 7.3.
- 7.25 There are differences in responses in terms of location. In particular, businesses in the south are significantly more likely than those in the north to cite congestion locally and more widely as well as localised access issues to the site.
- 7.26 TRAD sector businesses are most likely to experience issues with deliveries (48% stated they do not experience any problems compared to 61% average). Parking, and congestion locally and more widely are the most commonly cited problems by TRAD businesses.

Figure 7.3 Common problems with deliveries to the site experienced by businesses

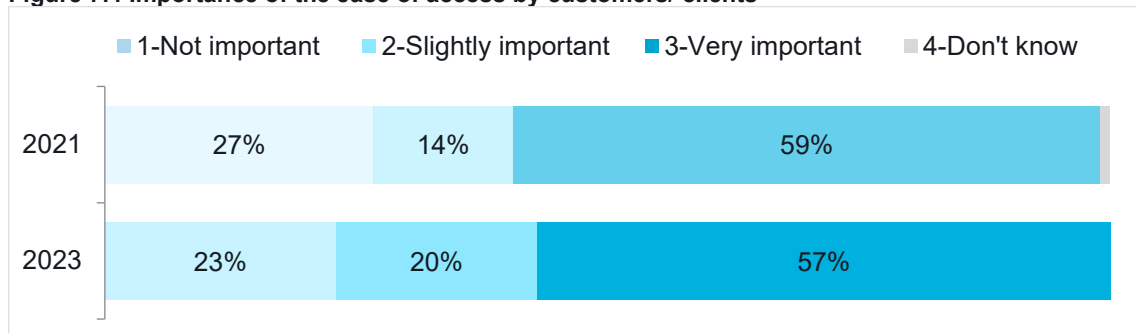


Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q18: 'What, if any, problems do you experience with deliveries to this site?'; Year 1 (n= 300); Year 2 (n= 402)

Ease of access

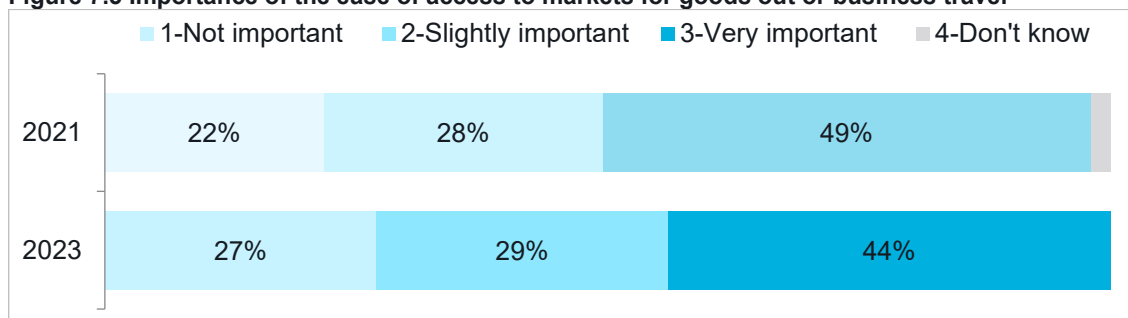
- 7.27 Ease of access by customers/ clients is deemed to be more important to businesses than access to markets for goods-out or business travel, with over half (57%) saying ease of access by customers/ clients is very important compared to 44% stating ease of access to markets is very important.
- 7.28 Comparing findings from 2021 and 2023, a larger proportion of businesses are saying that easy access by customers is important ('very' and 'slightly') in wave two compared to wave one (77% vs 73% in 2021). On the other hand, ease of access to markets for goods-out has been cited by fewer businesses than in 2021 (73% vs 77% in wave one).

Figure 7.4 Importance of the ease of access by customers/ clients



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q20: 'How important are the following to your business at this site?'; Year 1 (n= 300); Year 2 (n= 402)

Figure 7.5 Importance of the ease of access to markets for goods out or business travel



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q20: 'How important are the following to your business at this site?'; Year 1 (n= 300); Year 2 (n= 402)

- 7.29 There are no significant variations by location, with businesses in the south and north equally saying that ease of access to customers and markets is very important (57% each).
- 7.30 TRAD businesses are more likely than others to state that ease of access to customers/ clients and markets is very important (71% vs 57% average and 55% vs 44% average). Perhaps as expected, Construction businesses are the least likely to deem ease of access to customers to be very important (27% vs 57% average saying it is very important).
- 7.31 Larger companies (with 10+ employees) are more likely than the smallest businesses to say that ease of access by clients is very important (72% vs 55% respectively). Otherwise there is little difference in the distribution of responses by business size.

Business performance and outlook: key changes compared to 2021

- More businesses have made no changes or increased the number of their employees compared to 2021 (74% vs 66% and 14% vs 7% respectively), indicating potential post-pandemic recovery effects.
- The number of businesses that have or are currently recruiting staff has increased from 24% in 2021 to 30% in 2023. Type of work/ difficulty in getting the right skills remains the most common challenge in hiring new staff and is even higher than the 2021 figure (42% vs 49% in 2023).
- More businesses state that they do not anticipate relocating in the upcoming year than in 2021 (81% vs 88% in 2023), and more businesses report no issues with deliveries compared to wave one (61% vs 47% in 2021).
- Easy access by customers/ clients is very important to 57% of businesses (vs 59% in 2021), while ease of access to markets is very important to 44% compared to 49% in 2021.

8 Business Survey Findings: Cross-River Movements

8.1 This section reports findings related to businesses use of river crossings currently, including the importance of the available crossings. It considers how river crossings may constrain activity and the predictability of road traffic. It concludes with businesses' attitudes towards the Silvertown Tunnel. The data is compared to the 2021 results and pertinent insights are presented in the report. It is worth noting that some questions, for instance about the importance of the Silvertown Tunnel, were framed in the present tense and this will have affected how business respondents answer about a future river crossing that is not yet available.

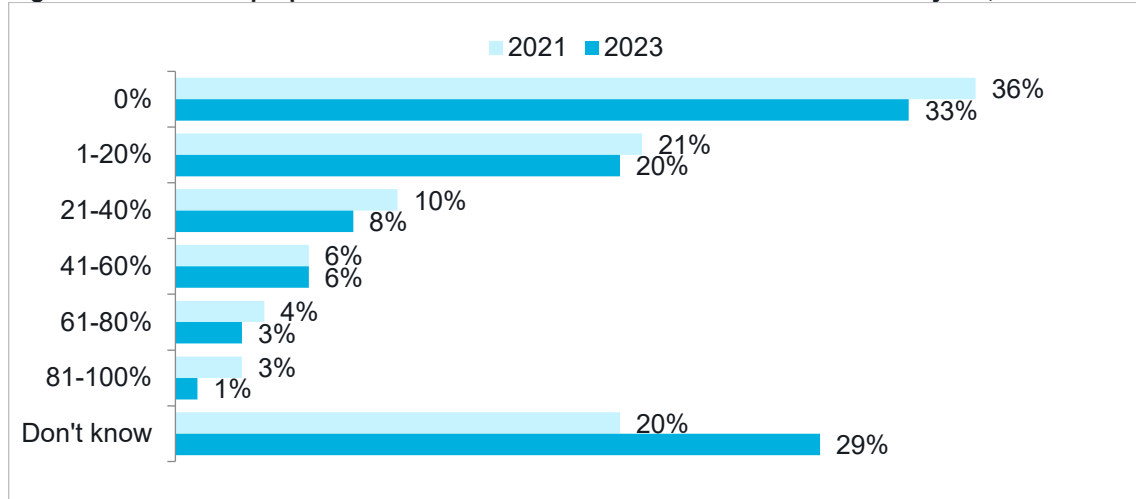
- Most companies make business trips that involve crossing the Thames and almost two in five say the same about their customers/ clients.
- The Blackwall Tunnel remains the most important river crossing from east to southeast London; this has increased compared to the last wave while the importance of Tower Bridge has decreased. When asked about each crossing individually, the future Silvertown Tunnel receives similar importance scores to Tower Bridge and the Rotherhithe Tunnel.
- Fewer businesses than in the first wave said that the number or capacity of river crossings constrains their operations or viability. However, the proportion rating the predictability of road journey times in the area as 'poor' or 'very poor' has increased.

Use of river crossings by customers

8.2 A third of businesses (33%) say their visitors/customers are not crossing the river in east/southeast London to get to their site. A further third (29%) do not know whether their customers are crossing the river to reach their site, which is a significant change from the 20% in 2021.

8.3 Among the 38% who say some of their customers cross the river, the most given answer is 1-20% of customers cross the river. Very few businesses say that the majority of their visitors cross the river.

Figure 8.1 Estimated proportions of visitors/ customers make cross-river travel by car, van or bus



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q10: ‘As a percentage, approximately what proportion of visitors/ customers who travel by car, van or bus travel from across the river in east/southeast London to get to this site?’; Year 1 (n= 300); Year 2 (n= 402)

8.4 There are some differences by location; among businesses to the south of the Thames, a larger share said they do not know how many of their customers need to cross the river (32% vs 27% of businesses in the north) but they are also more likely to say that a higher proportion of their customers cross the river (24% saying 21% or more vs 15% of those in the north).

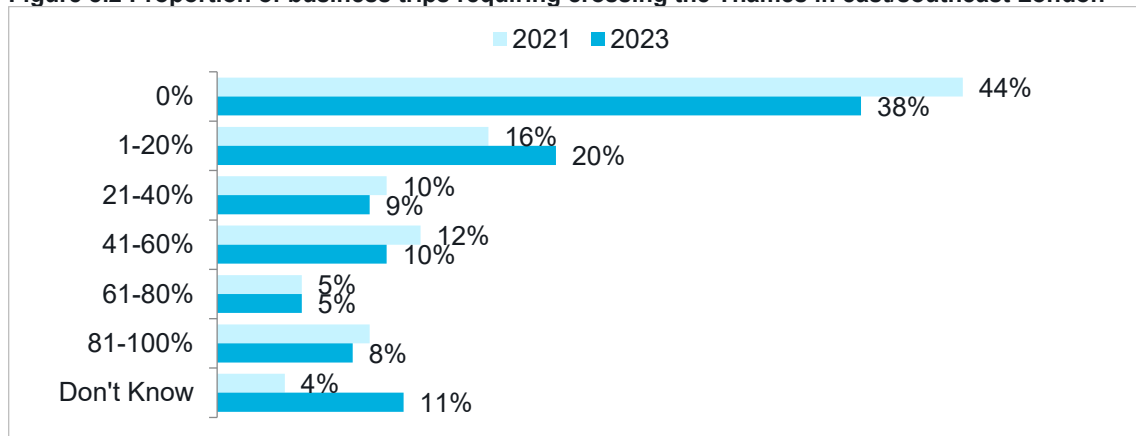
8.5 Construction businesses are the least likely to have visitors crossing the river (19%) compared to those in TRAD (42%) and Private sector (39%).

Use of river crossings for business trips

8.6 Half (52%) of businesses say that at least some of their business trips cross the Thames in east/southeast London. Only 13% say 60%+ of trips cross the river.

8.7 Compared to wave one, fewer businesses do not make any cross-river business trips, however more business respondents also admitted not knowing the volumes of those trips.

Figure 8.2 Proportion of business trips requiring crossing the Thames in east/southeast London



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q24: ‘As a percentage, approximately what proportion of visitors/ customers who travel by car, van or bus travel from across the river in east/southeast London to get to this site?’; Year 1 (n= 300); Year 2 (n= 402)

- 8.8 Business trips crossing the river provides one of the largest differences between businesses on the north and south of the river. Over two in five (46%) businesses to the north make business trips which cross the river, while for businesses to the south it is over half (57%).
- 8.9 In addition, businesses to the south say much larger volumes of business trips need to cross the river: over a third (35%) say at least 41% of trips cross the river vs one in ten (13%) businesses in the north say this. This is similar to the 2021 profile.
- 8.10 Construction businesses (68%) are more likely to say they cross the river for business trips, compared to TRAD (47%) and Private sector (50%).

Profile of those using the river crossings

- 8.11 Combining responses to the previous two questions, it is possible to understand the profile of businesses who use the river crossings for business trips customers/ visitor access, both or not at all. Note this does not consider whether staff are commuting across the Thames (this aspect is picked up in the analysis of residential surveys).
- 8.12 As seen in Table 8.1, fewer businesses see cross-river trips for both purposes compared to wave one. Among those who do, a slightly larger share of businesses make cross-river business trips than have visitors traveling across the Thames. This is a similar breakdown to the 2021 profile.
- 8.13 Businesses to the north of the Thames are less likely to make cross-river trips than those to the South.
- 8.14 TRAD sector businesses are less likely to see cross-river trips than Construction or Private sector businesses.

Table 8.1: Use of river crossings for business or customers/ visitors

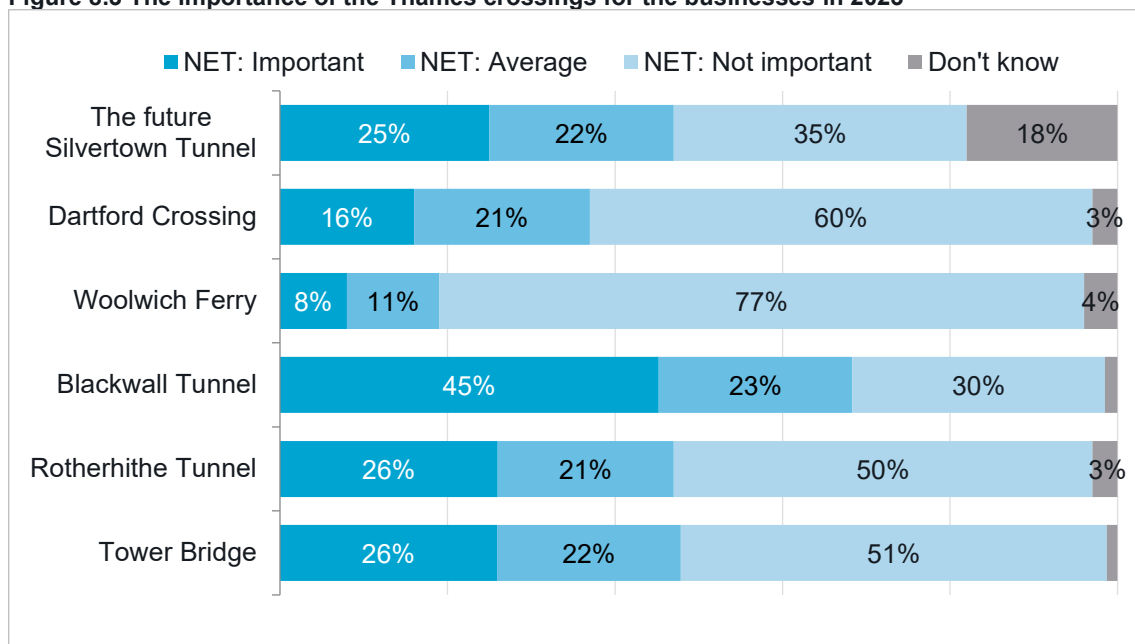
| | All businesses in 2021 | All businesses in 2023 | Businesses in north in 2023 | Businesses in south in 2023 |
|--|------------------------|------------------------|-----------------------------|-----------------------------|
| Cross river for both purposes | 26% | 22% | 22% | 24% |
| Customer/ visitor cross-river trips only | 18% | 16% | 19% | 13% |
| Cross river for business trips only | 26% | 29% | 25% | 34% |
| No trips which cross the Thames | 30% | 33% | 35% | 30% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q10’ As a percentage, approximately what proportion of visitors/customers who travel by car, van or bus travel from across the river in east/southeast London to get to this site?’; Q24: ‘As a percentage, approximately what proportion of visitors/ customers who travel by car, van or bus travel from across the river in east/southeast London to get to this site?’; Year 1 (n= 300); Year 2 (n= 402)

Importance of river crossings

- 8.15 Businesses were asked to rate the importance of the Thames crossing on a six-point scale, where six was 'very important' and one was 'not very important'. Figure 8.3 shows the full breakdown with the ratings grouped as:
- 'NET: important' including scores 5 and 6
 - 'NET: average' including scores 3 and 4
 - 'NET: not important' including scores 1 and 2
- 8.16 The Blackwall Tunnel is seen by respondents as the most important Thames crossing of those considered in the survey. Overall, two fifths of businesses see this crossing as important, which increases to 68% when including those who rate it of 'average importance' (3-4 out of 6).
- 8.17 A similar number of businesses rated Tower Bridge, Rotherhithe Bridge and the future Silvertown Tunnel as important or average. The 'don't know' share is relatively high for Silvertown Tunnel.
- 8.18 Fewer businesses in 2023 rated the future Silvertown Tunnel as important compared to 2021 (25% vs. 33% in 2021); more businesses rate it as 'average' (22% vs. 14% in 2021). The share rating it as 'not important' also declined (35% vs. 38% in 2021).

Figure 8.3 The importance of the Thames crossings for the businesses in 2023



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q25' How important do you consider each of the following Thames crossings for your business (including staff commutes, customer/client access and business travel)? The future Silvertown Tunnel?'; Year 2 (n= 402)

- 8.19 When asking directly, "which is most important?", the future Silvertown Tunnel receives a relatively small share (4%). The ratings of the others are largely in line with the detailed ratings above. Business respondents judge the importance of transport options based on the journeys they currently take. Therefore, they cannot be expected to place as much importance on a hypothetical future option as they do on the ones they currently use.

8.20 There are no significant variations across the two waves, except for Tower Bridge which saw a significant decrease in the number of businesses mentioning it as the most important crossing

Table 8.2: The most important Thames crossings

| Thames crossings | All businesses In 2021 | All businesses In 2023 | Businesses in the north in 20223 | Businesses in the south in 2023 |
|------------------------------|------------------------|------------------------|----------------------------------|---------------------------------|
| Blackwall Tunnel | 39% | 45% | 45% | 44% |
| Tower Bridge | 24% | 15% | 14% | 15% |
| Rotherhithe Tunnel | 8% | 11% | 8% | 15% |
| The future Silvertown Tunnel | 6% | 4% | 3% | 5% |
| Dartford Crossing | 5% | 4% | 5% | 3% |
| Woolwich Ferry | 3% | 1% | 0% | 1% |
| None are important | 16% | 21% | 24% | 16% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q26' Which of the following is the most important for travel to your site?'; Year 1(n=300); Year 2 (n= 402)

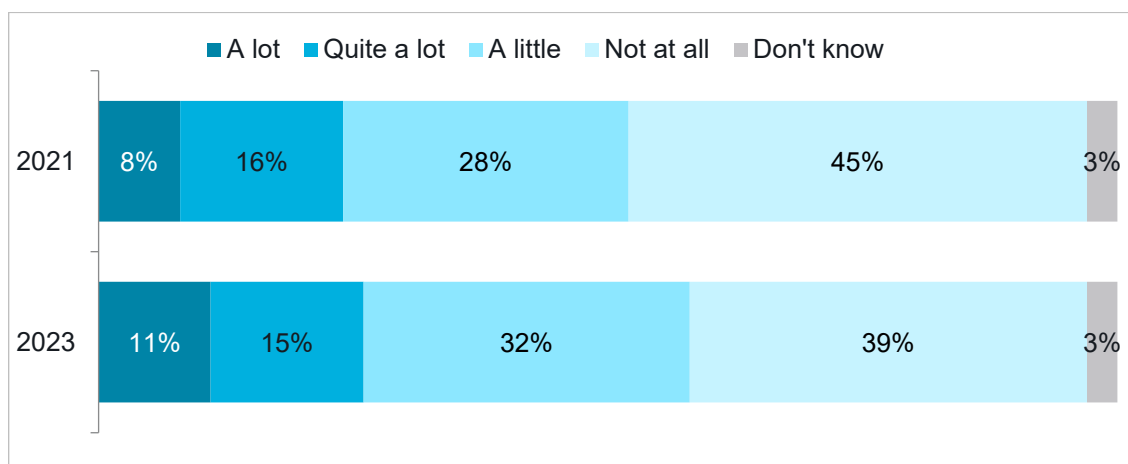
8.21 The Blackwall Tunnel retains its prominence for businesses in the north and the south. The Rotherhithe Tunnel is much more important for those to the south than the north (15% vs 8% respectively). The future Silvertown Tunnel is also viewed as more important in the south (5% vs 3% in the north). As mentioned, this question was asked in present tense and this will have affected results for the Silvertown Tunnel as it is not yet open.

8.22 The Blackwall Tunnel is also the most mentioned across sectors, with construction businesses particularly likely to say it is most important. Tower Bridge and the Dartford Crossing are also more favoured by Construction businesses than other sectors. The future Silvertown Tunnel is mentioned by more Private sector businesses than those in TRAD or Construction sectors.

River crossings constraining activity

8.23 Nearly two in five (39%) businesses say that the number or capacity of river crossings does not constrain operations or viability of business at this site – a significant decrease compared to 45% in 2021. This might be expected, given that businesses have located in these areas with the existing cross river connectivity, and have adapted their operations, either consciously or unconsciously, to a context in which the Silvertown Tunnel does not yet exist or provide transport/connectivity options.

Figure 8.4 Extent to which the current number or capacity of river crossings constrain operations or viability of business



Source: TfL, Silvertown Tunnel socio-economic monitoring; business surveys; Q27: 'To what extent does the current number or capacity of river crossings constrain operations or viability of business on your site?'; Year 1 (n=300); Year 2 (n= 402)

8.24 Overall, businesses in the south are much more likely to report that the current capacity of river crossings constrains their operations 'quite a lot' or 'a lot' (32% vs 22% in the north), while those in the north are more likely to say 'a little' or 'not at all' (75% vs 66% in the south).

8.25 Private sector businesses are the least likely to say the crossings are constraining them, while 45% of TRAD businesses say they are constraining them 'a lot' or 'quite a lot'.

Predictability of road traffic

8.26 Half (50%) of businesses feel that predictability of journey times for road traffic crossing the Thames in the Silvertown/ Blackwall area is poor or very poor. Conversely, only 11% say that predictability of journey times is good/ very good.

8.27 The general breakdown is similar to the 2021 findings. However, a slightly larger share of businesses reported the predictability of road traffic as poor or very poor compared to wave one (50% vs 46% in 2021).

8.28 Businesses in the north are significantly more likely to say 'very good' (predictable) than those in the south (5% vs 2% respectively). Otherwise there are little differences by location.

8.29 An equal share of Construction (60%) and TRAD (61%) businesses think predictability is poor or very poor compared to Private sector businesses (46%). In addition, no Construction businesses highlighted predictability as being 'good' or 'very good'.

Business cross-river movements: key changes compared to 2021

- Fewer businesses say customers/ visitors cross the river to get to their site than in 2021 (44% vs 38% in 2023).
- The proportion of businesses making business trips that cross the Thames, and the proportion who say that neither they nor their customers make trips crossing the Thames have remained largely unchanged since 2021.

- The Blackwall Tunnel is seen as the most important crossing by more businesses in 2023 (45%) than in 2021 (39%) while Tower Bridge has decreased (15%, vs 24% in 2021).
- The proportion rating the future Silvertown Tunnel as the most important crossing is similar to 2021 (4% in 2023 vs 6% in 2021) and the proportion rating it as important on its own is down slightly (25%, vs 33% in 2021).
- Fewer businesses in 2023 said that the number or capacity of river crossings does not constrain operations or viability of business at this site - a significantly lower share than wave one (39% in 2023 vs 45% in 2021).
- More businesses in 2023 (50%) said the predictability of journey times for road traffic crossing the Thames in the Silvertown/ Blackwall area are poor or very poor, which is a four-point increase from 46% in 2021.

9 Resident Surveys: Introduction

- 9.1 The residential data for the second wave was collected in October 2023 and achieved a sample of 1,027 responses from residents across the study area (the London Boroughs of Hackney, Tower Hamlets, Newham, Redbridge, Barking & Dagenham, Waltham Forest, Southwark, Lewisham, and Greenwich). The survey was conducted face to face in residents' homes.
- 9.2 The timeframe and sample size are consistent with the approach undertaken for the 2021 wave, when a total number of 1096 responses was achieved.
- 9.3 The residential survey results from 2023 are compared to the 2021 data and pertinent findings as well as insights for subgroups are reported accordingly. Individual data figures from 2021 are not included in this report, however they will contribute to the overall baseline report that will describe the socio-economic conditions and changes before prior to the tunnel opening.
- 9.4 Significance testing (at a 95% confidence interval meaning that there was a 95% chance the difference is not caused by the sample variation) was used to report on differences between waves. In such instances, the term 'significant' was generally used to refer to this threshold.
- 9.5 The survey questionnaire is provided in Appendix A.

Sampling

- 9.6 Similarly to wave one, a Random Location Sampling method was adopted, whereby interviewers worked across the study area until the required number of surveys (1,000) were completed.
- 9.7 Within this approach, the number of surveys was spread across the boroughs that form the study area proportionately so that boroughs with a larger population inside the study area (Newham and Greenwich) received a higher share of total surveys than boroughs with a smaller population inside the study area (Hackney and Barking & Dagenham).
- 9.8 In addition, quotas were set for:
- Age;
 - Gender; and
 - Approximated social grade.
- 9.9 Quotas for age and gender ensure a broad demographic spread within the data. Approximated social grade enables an understanding of how changes in travel and access to opportunities are experienced across higher and lower income groups.

Weighting

- 9.10 The weighting scheme used in 2021 was also applied to this year’s results. Resident responses were weighted by borough, age, gender, and socio-economic grades (SEG) as shown in Table 9.1. As quotas had been used during fieldwork, weights were minimal.
- 9.11 All survey figures in this report are weighted.

Table 9.1: Weighting scheme for the residential survey result

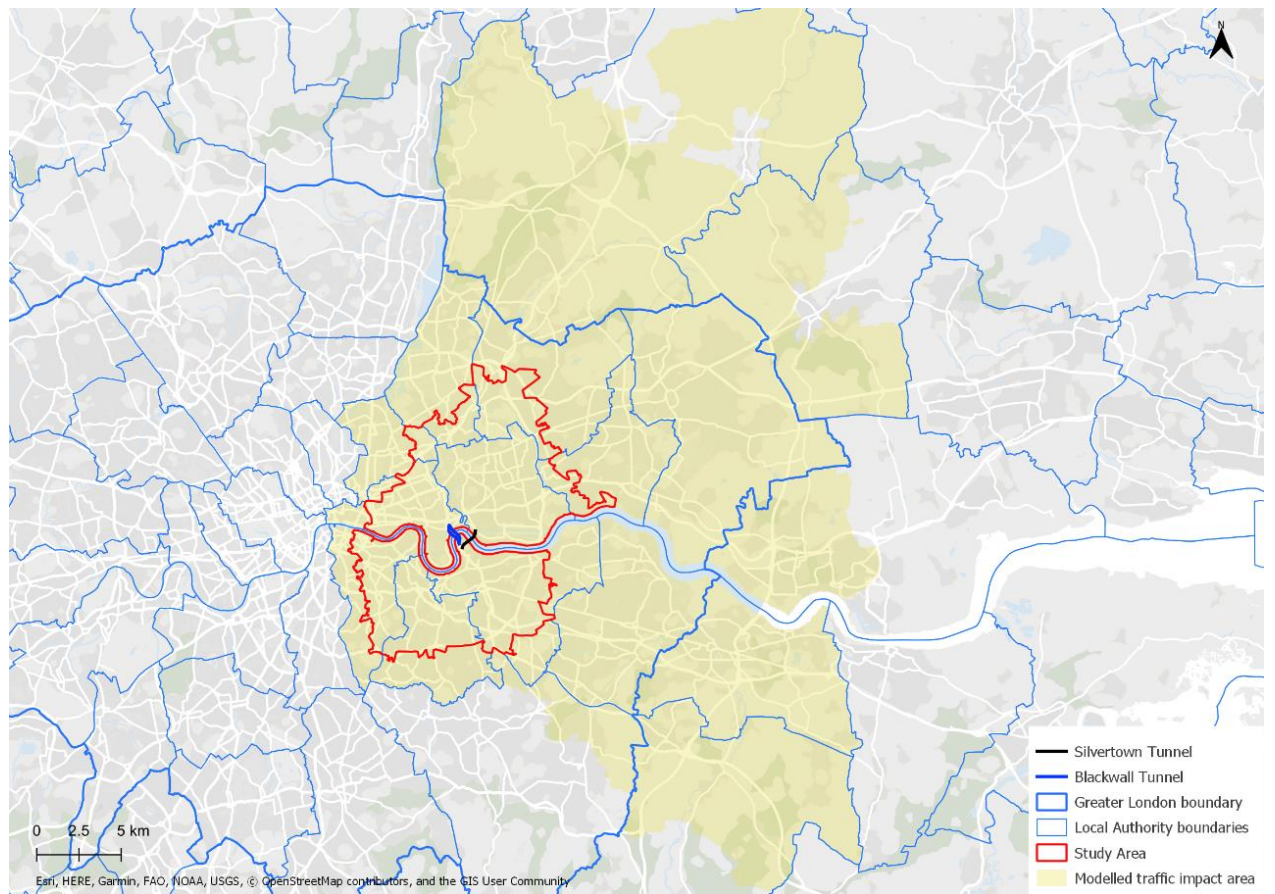
| | Unweighted responses | Unweighted % | Weighted responses | Weighted % |
|----------------------|----------------------|--------------|--------------------|------------|
| London Borough | | | | |
| Barking and Dagenham | 22 | 2% | 21 | 2% |
| Greenwich | 130 | 13% | 131 | 13% |
| Hackney | 11 | 1% | 10 | 1% |
| Lewisham | 154 | 15% | 139 | 14% |
| Newham | 253 | 25% | 256 | 25% |
| Redbridge | 56 | 5% | 58 | 6% |
| Southwark | 140 | 14% | 145 | 14% |
| Tower Hamlets | 211 | 21% | 221 | 22% |
| Waltham Forest | 50 | 5% | 45 | 4% |
| Age | | | | |
| 16-34 | 400 | 39% | 426 | 41% |
| 35-54 | 392 | 38% | 382 | 37% |
| 55+ | 235 | 23% | 220 | 21% |
| Prefer not to say | - | 0% | - | 0% |
| Gender | | | | |
| Male | 531 | 52% | 531 | 52% |
| Female | 496 | 48% | 496 | 48% |
| Approximate SEG | | | | |
| ABC1 | 516 | 50% | 545 | 53% |
| C2DE | 474 | 46% | 445 | 43% |
| Refused | 37 | 4% | 37 | 4% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Year 2 (n=1027)

Notes regarding analysis

- 9.12 The base sizes for the London Borough of Hackney and Barking & Dagenham were too low, below 50, to provide robust analysis on their own, but are included at the total level. The results for Redbridge and Waltham Forest were analysed at a borough level but were too small to allow analysis by subgroup. This is due to the fact that the research sample was designed to reflect the population of the London boroughs included in the study area. Some boroughs are represented by smaller proportions (as shown in Figure 9.1) and therefore their base sizes, contributing to the total sample, are lower.
- 9.13 Throughout this report, low sample bases have been highlighted where they occur, and results should be treated with caution.

Figure 9.1 London boroughs included in the study area



Source: Created by Steer for the Silvertown Tunnel socio-economic monitoring, 2021.

10 Resident Survey Findings: Study Area Demographics

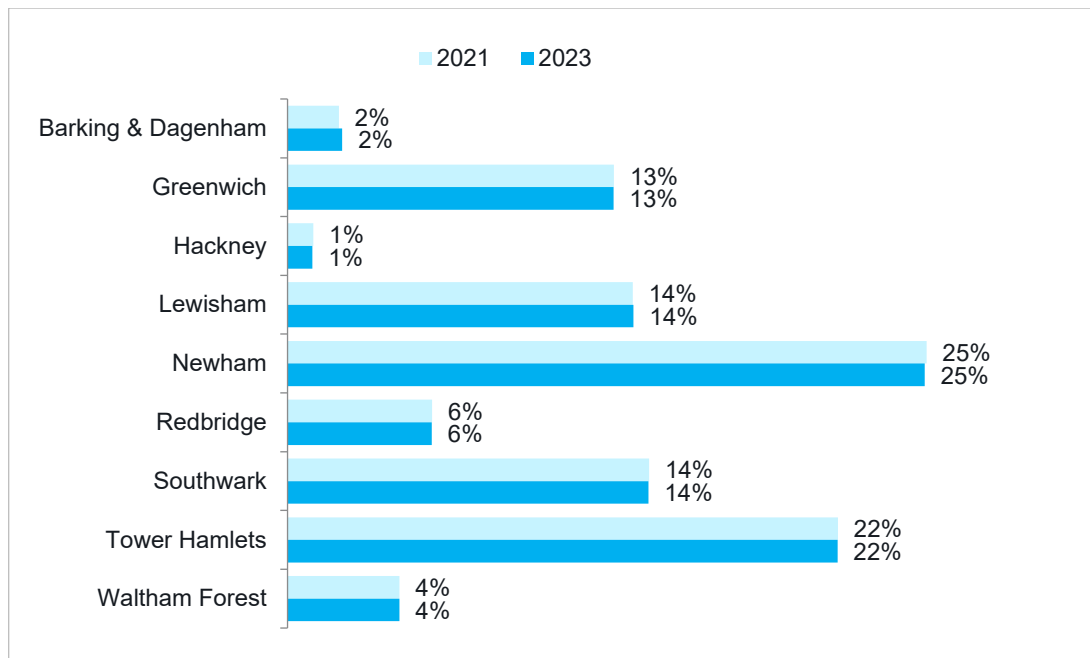
10.1 This section outlines the respondent profile in terms of location, age, gender, income, ethnicity, disability, working status, home ownership and vehicle access.

- In general, the demographic profile of the 2023 sample match that of the 2021 sample. Exceptions compared to 2021 include:
 - More high income (over £75,000) respondents
 - A noticeably higher proportion of residents from White ethnic backgrounds and a noticeably lower share of Black respondents
 - Fewer full-time workers and more-part workers
 - A noticeably higher proportion of residents with access to car or van

Home location

10.2 The local authority of the respondent's home location was coded by the interviewer at the beginning of the survey based on their location. As seen in Figure 10.1, the largest share of responses came from Newham and Tower Hamlets, while Barking & Dagenham as well as Hackney had the smallest proportion of respondents. This reflected the sample plan as outlined in the previous chapter.

Figure 10.1 Respondent home local authority

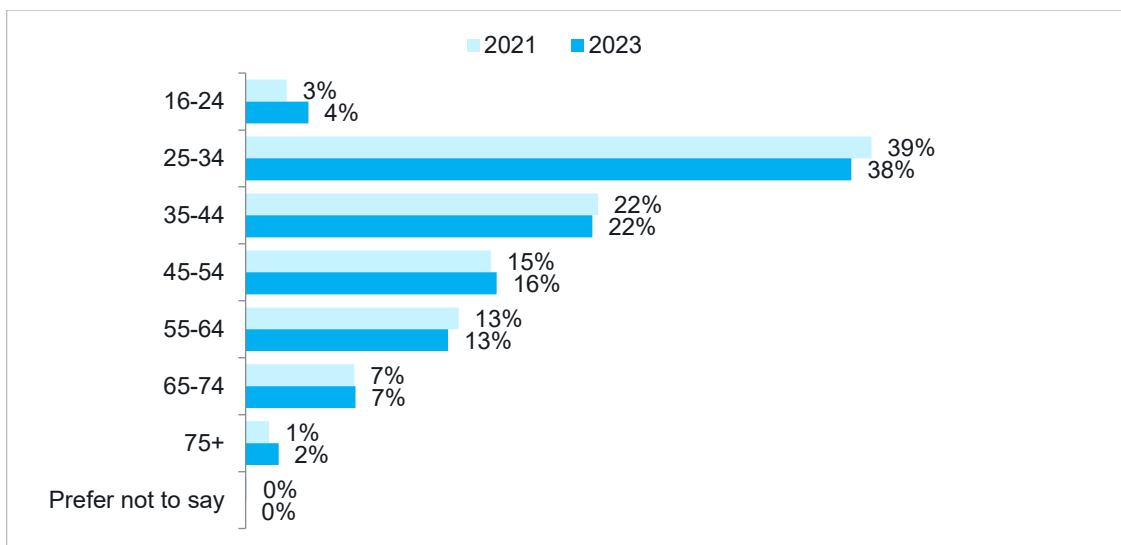


Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Year 1(n = 1096) and Year 2 (n=1027)

Age

- 10.3 Almost two fifths (38%) of respondents were in the 25-34 age bracket with shares declining with increasing age, reaching 2% among 75+ group. Younger people (16-24) accounted for only 4% of responses in line with year one. The detailed age breakdown is shown in
- 10.4 Figure 10.2.
- 10.5 In the rest of the report, due to the small base sizes, the lower and upper age bands have been merged with the next age group (16-24 and 25-34 collapsed into 16-34, and 65-74 and 75+ into 65+) to allow robust analysis. The same approach was applied in wave one.

Figure 10.2 : Respondent age



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; S2: 'What is your age?', S3: 'Which of the following age groups do you belong to?', Year 1(n = 1096) and Year 2 (n=1027)

Gender

10.6 Respondents were split between male and female, 52% to 48%. No one responded with ‘other’ or ‘prefer not to say’.

Household income and social grade

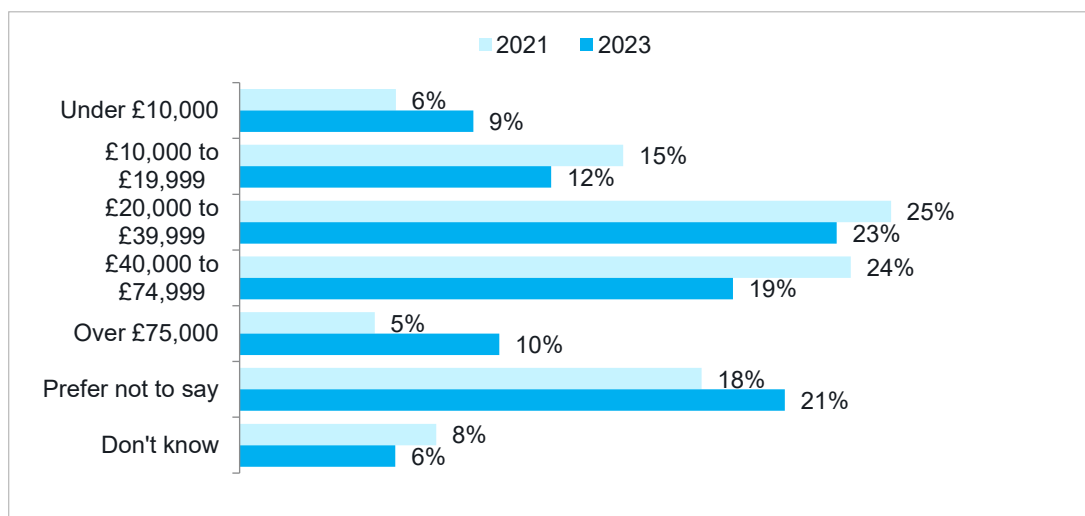
10.7 Figure 10.3 shows the profile of respondents by household income. The surveyed population is spread across three income bands: under £20,000, £20-40,000, and £40-75,000, with around a fifth in each group. One in ten have a household income over £75,000. One fifth (21%) preferred not to disclose this information and a further 6% did not know the answer.

10.8 When comparing the sample breakdown across the waves, wave two had a much higher proportion of respondents earning £75,000 or more (10% vs 5% in 2021) and a much smaller share of respondents stating £40,000-£79,499 as their income band (19% vs 24% in 2021).

10.9 Social grade is calculated from questions about the household’s chief income earner and their employment and responsibilities. Social grade is used for comparison throughout this report as a proxy for income.

10.10 Around half of respondents were ABC1 (53%), while 43% were C2DE. Four percent of the sample refused to provide an answer.

Figure 10.3 Respondent annual household income



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; D2 ‘What is your annual income?’, Year 1 (n = 1096) and Year 2 (n=1027)

Ethnicity

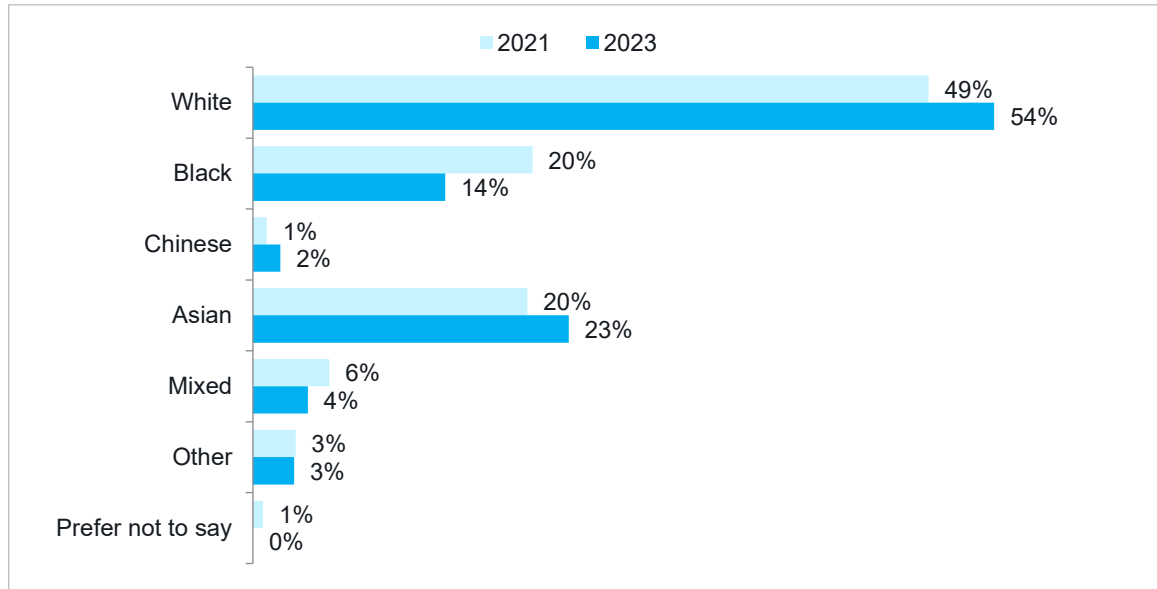
10.11 As shown in Figure 10.4, over half (54%) of respondents were from a White ethnic background, and just over one in five (23%) were Asian and 14% Black.

10.12 When making comparisons between 2021 and 2023, it should be noted that any differences between the years are caused by the sample effect rather than reflect true changes in the local population. For instance, in wave two a much higher proportion of

residents from a White background and a much lower number of Black respondents took part in the survey than in wave one.

- 10.13 For the purposes of this report, Mixed, Chinese, and Other have been combined into one group to provide a large enough group for comparison.

Figure 10.4 Respondent ethnic background



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; D3 'What is your ethnicity?', Year 1 (n = 1096) and Year 2 (n=1027)

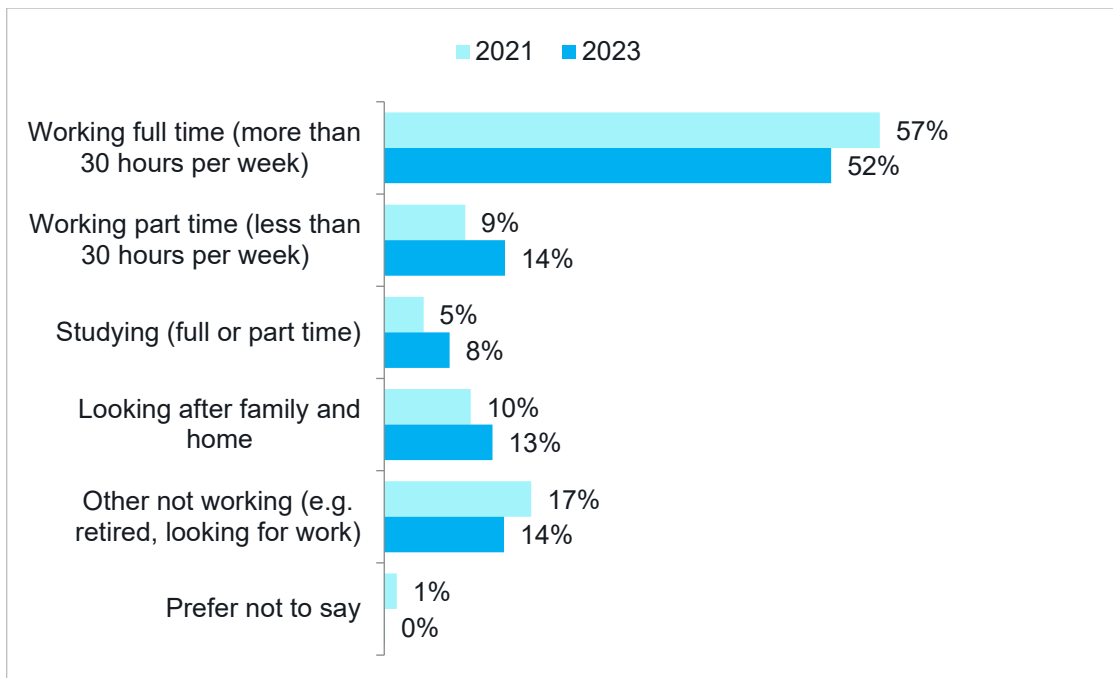
Disability

- 10.14 One in ten (10%) stated that they had a long term physical or mental disability or health issue that limits their daily activities, the work they can do or their ability to travel and get about.
- 10.15 In addition, one percent of respondents chose not to disclose this information.

Working status

- 10.16 Over half (52%) of respondents were working full time, followed by those working part time or 'other not working e.g. retired, looking for work' (14% each). A further 13% were looking after family and home.
- 10.17 The shares of working part-time (14%) or studying full or part time (8%) were significantly higher compared to 2021 (9% and 5% respectively). Whereas the number of respondents working full time (52%) or stating 'other not working' (14%) was significantly lower than in wave one (57% and 17% respectively). The full profile is shown in Figure 10.5.

Figure 10.5 Respondent working status

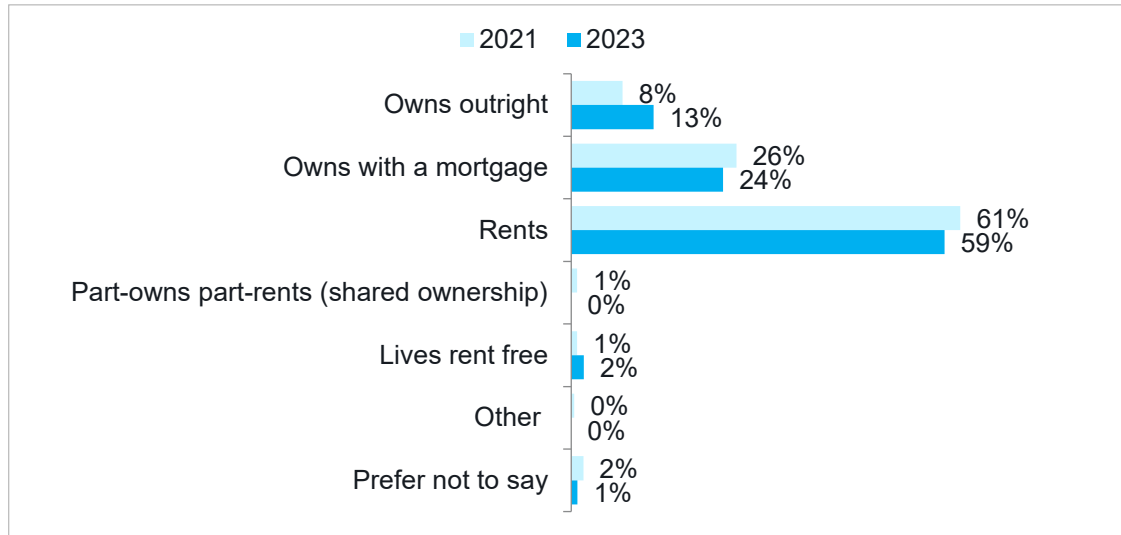


Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; D1 'Which option best describes your own working status?', Year 1 (n = 1096) and Year 2 (n=1027)

Home ownership

- 10.18 As seen in Figure 10.6, over half (59%) rent their home and a quarter (24%) own with a mortgage. In addition, a significantly higher share (13%) are now outright owners compared to the previous wave (8%).

Figure 10.6 Household ownership



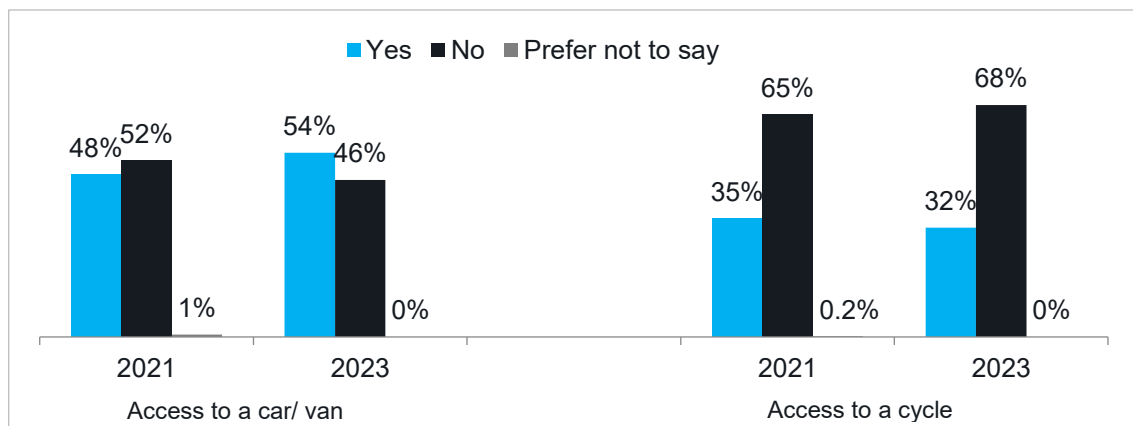
Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; D5 'Does your household own or rent your home?', Year 1 (n = 1096) and Year 2 (n=1027)

Car and cycle access

- 10.19 Over half (54%) of respondents have access to a car or van for personal use and a further third (32%) have access to a cycle. Over a third (34%) have no access to a car, van or cycle after combining responses to these two questions together. The detailed breakdowns are shown in Figure 10.7.

- 10.20 At this stage, it should be noted that any differences between the waves are more likely to reflect the sample response (the proportion of people taking part in the survey) rather than socio-economic changes in the study area. However, the data points are still valid and will be used when making full data analysis (before and after the tunnel opening).

Figure 10.7 Car and cycle access



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; D6 and D7 'Do you have access to a car/ van for personal use/ a cycle?', Year 1 (n = 1096) and Year 2 (n=1027)

11 Resident Survey Findings: General Travel Patterns

11.1 In order to understand how the Silvertown Tunnel might impact local travel, a number of questions were asked within the survey to understand the current travel patterns of respondents and provide a baseline for future comparison.

- Generally speaking, the overall pattern of journey purposes has remained unchanged since 2021. However, the journey frequency has increased in 2023, in particular for educational purposes, as residents are no longer impacted by the pandemic restrictions.
 - Shopping and personal business, leisure, and commute remain the most popular journey purposes.
 - Commuting to work remains the most frequently made trip type, with the vast majority of commuters travelling at least once a week and nearly half making this trip daily.
 - Travel for education remains the least common journey purpose but its weekly frequency has increased by a third compared to 2021.
- There are differences across the demographic subgroups. For instance, Lewisham, Waltham Forest, Tower Hamlets, Southwark have higher than average shares of daily commuters.
- Men, under 45s, ABC1s and residents from Black and Chinese/ Mixed/ Other ethnic backgrounds are also more likely to commute daily for work.
- Waltham Forest, Newham and Tower Hamlets have the largest proportion of weekly travellers for education.

Trip purposes

Respondents were asked how often they make journeys for the following purposes:

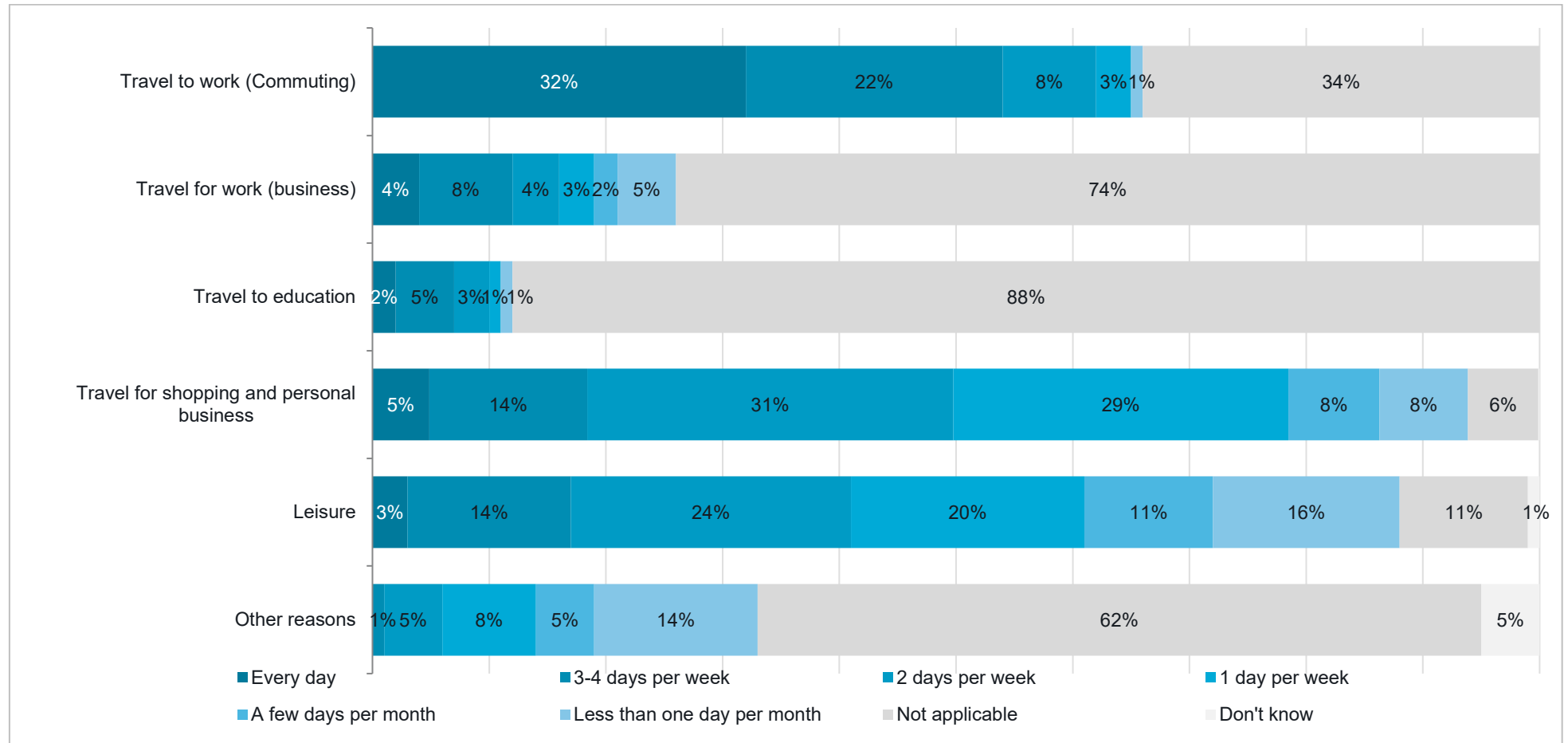
- Travel to work (commuting)
- Travel for work (business travel)
- Travel to education
- Travel for shopping and personal business
- Leisure
- Other reasons

11.2 Figure 11.1 shows the frequency of making trips for these purposes. After excluding 'don't know' and 'not applicable' answers, travel for shopping or personal business (94%), leisure (88%) and to work (66%) were generally the most popular journeys.

11.3 The share of residents making shopping and personal business trips 3-4 times a week increased significantly from 10% in 2021 to 14% in 2023, while the shares making such

trip types on a daily basis went up from 2% to 5%. Leisure trips made 3-4 times per week also saw a significant uptick (8% from 6% in 2021).

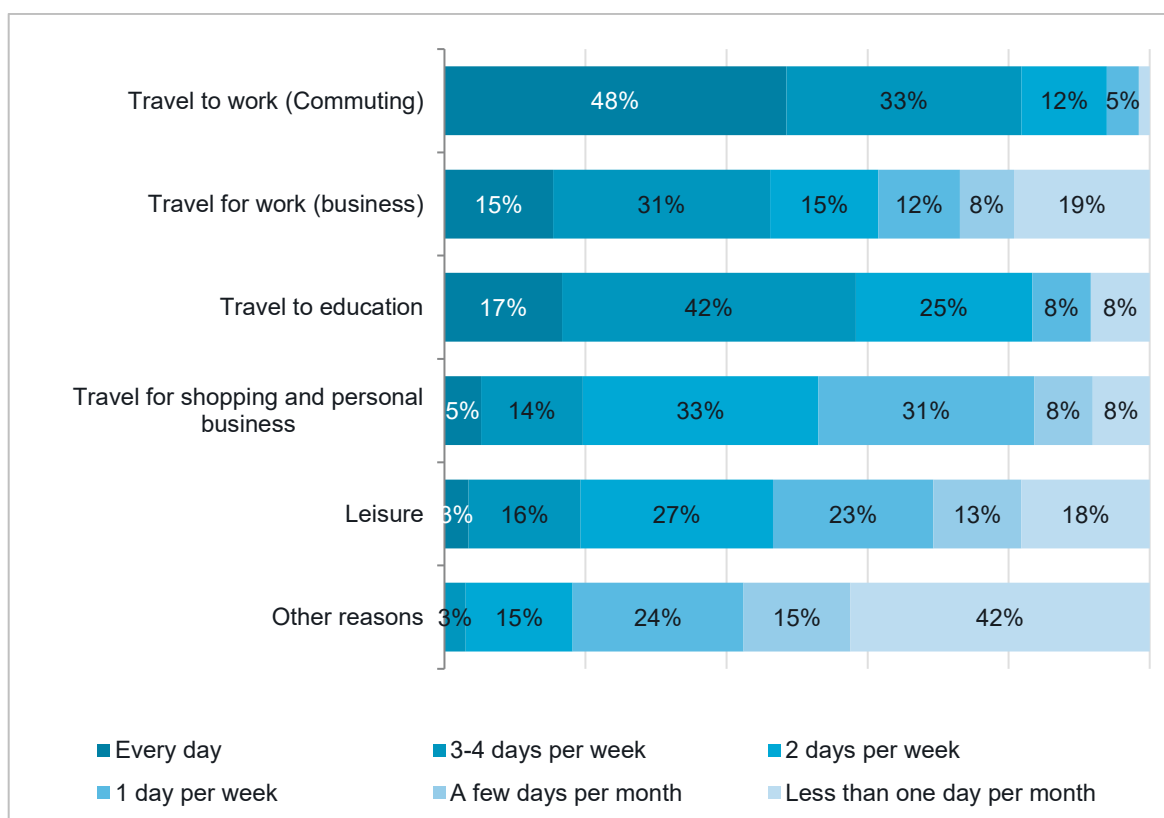
Figure 11.1 Frequency of travelling for different purposes



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q1 'In an average week, how often do you travel for the purpose of the following?', Year 2 (n=1027)

- 11.4 Travel to education was the least common trip type, with 88% of respondents not making such journeys at all. Despite this, the frequency of making such trips 3-4 times a week doubled compared to wave one, from 2% to 5% in 2023.
- 11.5 Business travel was next lowest with 74% of respondents not making any trips of this type. However, the share making this journey type 3-4 times a week increased significantly from 4% to 8%.
- 11.6 The share of trips made for ‘other reasons’ was significantly lower in 2023, with 62% not making such journeys at all compared to 45% in 2021.
- 11.7 Figure 11.2 shows, for those who make each type of journey, the frequency with which trips are made (excluding responses who stated ‘not applicable’ or ‘don’t know’).

Figure 11.2 Frequency of travelling for different purposes among those who make the journey type



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q1 ‘In an average week, how often do you travel for the purpose of the following?’, Year 2 (base sizes vary from n=117 to 964)

- 11.8 The vast majority (98%) of those who travel to work do so at least one day a week, with nearly half (48%) commuting every day. Travel to education is at least weekly for the majority; an increase to 92% from 59% in 2021. Nearly one fifth (17%) of those who travel for this purpose make this journey daily.
- 11.9 Over eight in ten (84%) travel for shopping or personal business at least once a week, and nearly three quarters (73%) do so for business trips, with 15% making this type of journey every day.
- 11.10 Comparatively fewer people travel for other purposes more than once a month.

Differences by local authority

11.11 There was variation in trip purposes and frequency by local authority. In summary:

- Travel to work (commute)
 - The shares of people commuting every day in Lewisham (53%), Waltham Forest (42%), Tower Hamlets (34%) and Southwark (33%) were above average
 - In Redbridge and Greenwich, the share commuting every day was particularly low (7% and 11% respectively) and even lower when compared to the 2021 figures for these boroughs (18% and 38% respectively)
- Business travel
 - In Southwark (27%), Newham and Greenwich (22% each), the share of people travelling at least once a week for this purpose was above average (19%)
 - The share of people not travelling for this purpose were highest among Waltham Forest (90%) and Tower Hamlets residents (82%)
- Education
 - Waltham Forest (18%), Newham (17%) and Tower Hamlets (12%) respondents were more likely than average to travel for education at least once a week
 - Conversely, the share of residents not travelling for this purpose were above average in Lewisham (96%), Greenwich (94%), Southwark (94%) and Redbridge (93%)
- Shopping or personal business
 - Residents in Southwark (30%), Redbridge (23%), Greenwich (19%) and Lewisham (15%) were more likely than average to take such trips 3-4 days a week
 - In Waltham Forest (68%), Newham (66%) and Tower Hamlets (61%) the share of residents travelling for this purpose once or twice a week were above average
- Leisure
 - Southwark (74%), Redbridge (54%) and Greenwich (46%) had all above average shares of participants travelling for this purpose 2-4 days a week
 - Residents in Lewisham (29%) and Waltham Forest (28%) were more likely than others to make this trip type less than once a month
 - Tower Hamlets had the largest share of 'not applicable' responses (18%)

Differences by age

- 11.12 Looking at the age groups, the frequency of daily commutes decreases as age increases, with under 45s being much more likely to travel to work than other age groups (with less than a third of respondents in each age band selecting 'not applicable'). Additionally, 45-54s were also more likely to travel for business than others.
- 11.13 For travel to education, the share of residents saying 'not applicable' increases with age.
- 11.14 Frequency of travelling 2-4 times a week for shopping and personal business increases with age, reaching 53% among over 65s.
- 11.15 Under 45s and the oldest (65+) age groups were also more likely to travel for leisure and do so more frequently than other age groups
- 11.16 Travel for other reasons was similar across all age groups, with 55-64s (34%) making more such trip types compared to 2021 (28%), and 45-54 (31%) and 65+ (31%) travelling less frequently than in wave one (38% for each age band in 2021).

Differences by gender

- 11.17 Men were more likely than women to travel for work every day. Conversely, women were significantly more likely than men to report they do not commute at all (44% vs 25%).
- 11.18 This was similar for business travel, with men being significantly more likely than women to travel three days a week or more for this purpose. Women were again more likely to say 'not applicable' than men (81% vs 68%).
- 11.19 The share of men travelling for education 3-4 days a week was significantly higher (7% vs 3% of women), whereas women were significantly more likely to make shopping and personal business trips 3-4 days a week (17% vs 10% of men).
- 11.20 Men were slightly more likely to make leisure trips (9% vs 13% of women saying 'not applicable').
- 11.21 There were no significant variations for other purposes across genders.

Differences by social grade

- 11.22 Social grade differences are strongly influenced by the fact that C2DE contains both retirees and full-time students.
- 11.23 ABC1 respondents were much more likely than C2DEs to commute to work (10% of ABC1s saying 'not applicable' vs 70% C2DEs stating the same). They were also much more likely to travel for business than residents from lower social grades (35% vs 12% C2DEs travel for this purpose).
- 11.24 On the other hand, C2DE participants were more likely to travel for education, with the share making this trip type at least three times a week being particularly high (16% vs 1% of ABC1s travelling with this frequency).
- 11.25 C2DEs were also significantly more likely than ABC1 to travel for shopping or personal business purposes 2-4 days a week (52% vs 40%). People from higher social grades, on the other hand, tend to travel for this purpose less frequently (one day per week or less often) – 51% vs 35% of C2DEs.
- 11.26 For leisure trips, C2DE residents were significantly more likely to not make such trips (14% stating 'not applicable' vs 9% of ABC1s).
- 11.27 There were fewer differences in travel frequency for other journey purposes.

Differences by ethnicity

- 11.28 Black respondents (42%) and residents from Chinese/ Mixed/ Other ethnic backgrounds (34%) were much more likely to commute daily than average. People from White or Asian ethnic backgrounds, on the other hand, were the least likely to make this journey type (37% of each ethnic group gave 'not applicable' responses).
- 11.29 The share of residents travelling for education was highest among residents from Asian ethnic backgrounds (22%).
- 11.30 White residents were slightly more likely to travel for shopping or personal business than other ethnic groups (49% doing so 2-4 days per week vs 45% average).
- 11.31 The share stating 'not applicable' for leisure trips was much higher than average among Asian respondents (20% vs 11% average).

11.32 There were no significant differences in travel frequencies for business or other purposes.

Differences by disability

11.33 Disabled respondents were much less likely to travel for commuting purposes, with only one fifth (20%) stating they travelled for this purpose compared to 72% of those who do not have disabilities. There were also very few disabled respondents travelling for education (only 1% vs 13% of those with no disabilities reported travelling for this reason).

11.34 A larger share of those who were not disabled travelled for shopping or personal business (95% vs 88% of those with disabilities), leisure (89% vs 86% of disabled respondents) business trips (29% vs 9% of disabled residents).

11.35 Travel for other purposes was higher among disabled respondents (44%) than non-disabled (32%).

12 Resident Survey Findings: Crossing the River Thames

12.1 This section further explores travel patterns, in particular how frequently residents cross the River Thames for different purposes and how easy they think it is to cross.

- **Frequency:** Nearly two in five (38%) respondents travel across the Thames at least once a week for any purpose - an increase from 33% in 2021 which reflects the post-pandemic recovery.
- More than half of trip types made by residents, except for those made for education and 'other' reasons, involve crossing the Thames, with commuting and business travel having the highest weekly frequency.
- There are also other differences in frequency of crossing the Thames for different purposes across the socio-economic demographics. For instance, under 55s were more likely than over 55s to cross the river for commute once a week or more often, whereas under 45s and over 65s were more likely to travel across the river with the same frequency for leisure than those aged 45-64.
- Greenwich residents have above average shares of cross-river trips for all purposes, followed by Newham and Southwark (four out of six trips have above average scores).
- **Purpose:** In general, commuting has remained the most frequent cross-river trip. Cross-river trips for leisure, shopping and personal business and 'other' purposes have declined, while trips for education and business trips have increased compared to 2021.
- Across the boroughs, the proportion of residents commuting was particularly high in Lewisham, Southwark and Greenwich. Residents aged 35-54, men, those from higher social grades (ABC1) as well as people from Black and White ethnic backgrounds were also more likely than average to commute across the Thames.
- In addition, a significantly higher number of people stated business travel as their most common trip purpose compared to 2021 (13% vs 5% in 2021), and this was particularly high among people aged 45-54s and Asian residents.
- **Regular cross-river trips:** Overall, two in three residents use public transport for regular cross-river trips which is similar to the 2021 finding.
- Underground/ DLR is the most common public transport option across all cross-river trips, but National Rail saw a significant increase for all journey types compared to 2021.
- **Reason for not crossing the river:** no need to reach destinations that require river-crossing is the most common explanation (91%) and given by more residents than in 2021 (85%). It is also likely reflecting the current availability of transport links rather than future transport connectivity in the area.
- **Ease of crossing the Thames:** Nearly half of residents rated crossing the Thames as easy, while less than a quarter said it is not easy. This rating breakdown is very

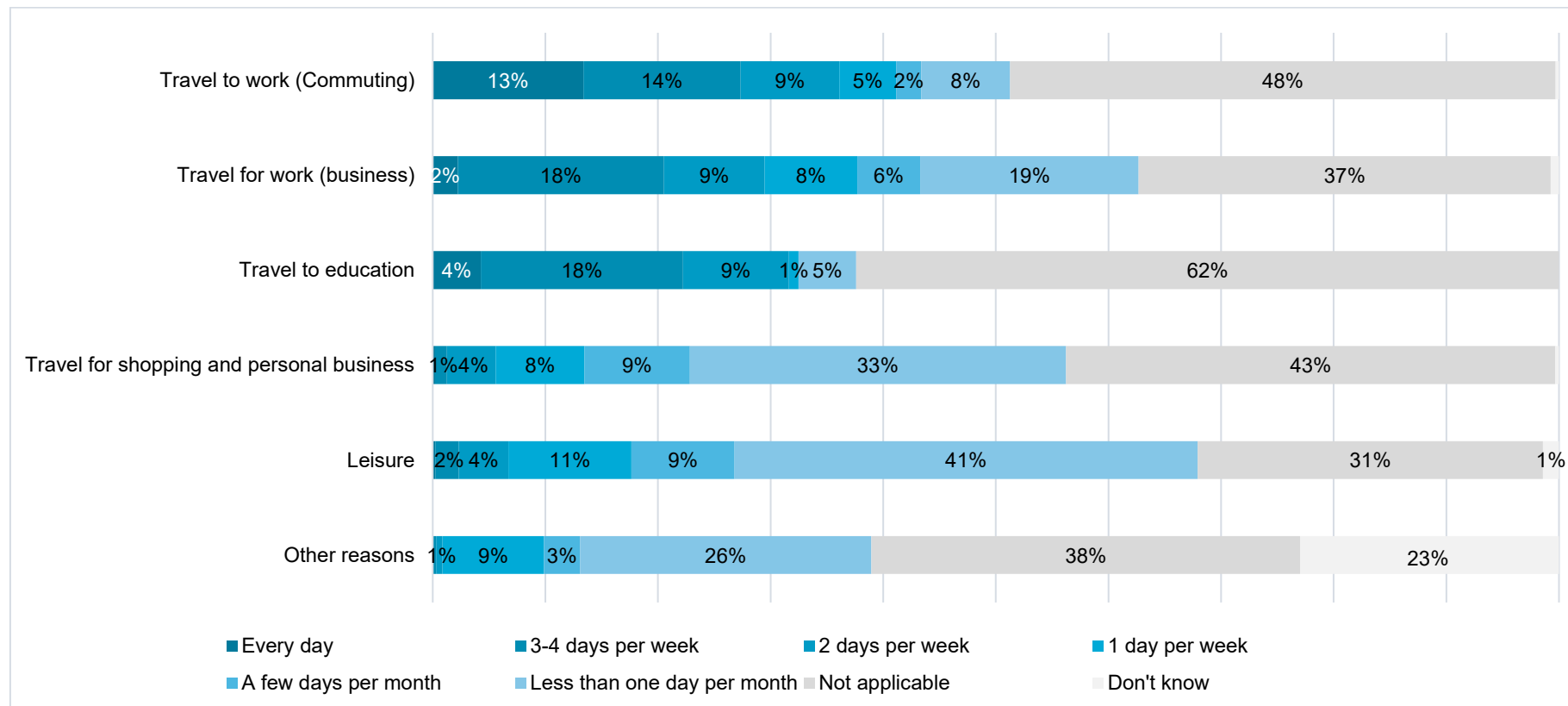
similar to wave one in 2021. Perhaps not surprisingly, those who cross the river regularly are much more likely to say it is easy than those who cross it less frequently.

- The main reason given for crossing the Thames not being easy remains traffic congestion, and this is unchanged since 2021. Access to crossings (taking too long to reach or not being near enough) are the next most mentioned reasons, which are also significantly higher than in wave one. However, lack of public transport options is significantly lower.
- There are also some variations in terms of demographics across the waves. For instance, Greenwich and Southwark residents, under 35s, men, ABC1s as well as respondents from White or Mixed/Chinese/Other ethnic background and non-disabled people were more likely than average to rate the river-crossing as easy. This is broadly similar to the 2021 findings. In particular, residents from Tower Hamlets and Black ethnic backgrounds as well as women and those aged 55-64 were more likely than others to give an 'easy' score in wave one than in wave two.

Frequency of cross-river trips

- 12.2 Residents who travelled for each of the different purposes were asked how often these journeys involved crossing the River Thames in East/ Southeast London. Figure 12.1 shows the detailed frequency of these trip types from the 2023 survey.
- 12.3 Over half of trips for leisure, business, shopping and personal business as well as commuting were cross-river trips. Among those journeys, commutes to work and business trips had higher weekly frequencies (41% and 38% respectively crossing the Thames at least once a week).
- 12.4 Trips for education and other purposes were generally less likely to cross the river although journeys for education had a higher weekly frequency (32% of respondents crossed the river for this purpose at least once a week).
- 12.5 Compared to 2021, the proportions commuting and travelling for business crossing the Thames significantly increased in 2023, and so did the shares of residents travelling at least once a week for these reasons.
- 12.6 There was a significant drop in travel for education and 'other' purposes crossing the river compared to wave one.

Figure 12.1 Frequency of travelling for different purposes across the River Thames in East/Southeast London among those who make any journey type



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q2 'How often do you travel across the River Thames in east/southeast London for [purpose]?', Year 2 (base sizes vary from n= 117 to 964).

- 12.7 Combining the responses from the individual purpose questions show that overall, nearly two fifths of residents (38%) cross the Thames at least once a week for any purpose, a significant increase from 33% in 2021. A summary of journey frequencies is shown in Table 12.1.
- 12.8 Within the survey, this cohort of journeys which cross the Thames at least weekly were defined as ‘regular’.

Table 12.1: Frequency of travelling for journey purposes across the River Thames in East/Southeast London

| Frequency of crossing River Thames: | Among all respondents (n=1096) | | Among those who make journey type | |
|---|--------------------------------|---------------------|-----------------------------------|---------------------|
| | At all | Once a week or more | At all | Once a week or more |
| Travel to work (Commuting) | 34% | 27% | 51% | 41% |
| Travel for work (business) | 16% | 10% | 63% | 38% |
| Travel to education | 4% | 4% | 38% | 32% |
| Travel for shopping and personal business | 53% | 13% | 56% | 13% |
| Leisure | 60% | 16% | 68% | 18% |
| Other reasons | 13% | 3% | 39% | 10% |
| Cross the River Thames for any purpose | | 38% | | 100% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q2 ‘How often do you travel across the River Thames in east/southeast London for [purpose]?’; Year 2 (base sizes vary from n= 117 to 1096)

- 12.9 Of residents who cross the river at least once a week, nearly half (47%) do so for just one purpose. One in ten (9%) cross the River Thames at least once a week for four, five or all six of the given reasons.
- 12.10 As with business travel, residents’ cross river travel is likely to reflect the ‘status quo’ of travel and connectivity options.

Differences by local authority

- 12.11 There was some variation in trip purposes as seen in Table 12.2. Greenwich had above average shares for all cross-river trips, followed by Newham and Southwark with four (out of six) trip types above average – the highlighted cells. Nearly two thirds of residents from Greenwich and just over two in five from Newham and Southwark cross the river at least once a week for any purpose.
- 12.12 Greenwich, Newham, Southwark and Lewisham had above average shares of commuters crossing the Thames. Almost half of Greenwich residents surveyed cross the river at least once a week for this purpose.
- 12.13 Cross-river leisure trips and journeys for shopping or personal business were nearly twice the average in Greenwich and Southwark.
- 12.14 Compared to wave one, weekly cross-river trips for any purpose significantly increased among Greenwich residents (64% vs 48% in 2021) and nearly doubled among Newham respondents (43% vs 23% in 2021). Redbridge had the largest drop in all journey

purposes compared to the previous wave (2% vs 27% in 2021) although the base here is low.

Table 12.2: Travelling for journey purposes across the River Thames in East/ Southeast London at least once a week – by borough of residence

| Above average scores are highlighted | All (n=1027) | Greenwich (n=131) | Lewisham (n=139) | Newham (n=256) | Redbridge (n=58) | Southwark (n=145) | Tower Hamlets (n=221) |
|---|--------------|-------------------|------------------|----------------|------------------|-------------------|-----------------------|
| Travel to work (commuting) | 27% | 49% | 28% | 32% | 2% | 29% | 12% |
| Travel for work (business) | 10% | 18% | 5% | 15% | 0% | 14% | 4% |
| Travel to education | 4% | 5% | 3% | 8% | 0% | 1% | 2% |
| Travel for shopping and personal business | 13% | 24% | 11% | 10% | 0% | 22% | 6% |
| Leisure | 16% | 30% | 11% | 15% | 0% | 31% | 8% |
| Other reasons | 3% | 5% | 1% | 7% | 0% | 2% | 0% |
| One day a week or more for any purpose | 38% | 64% | 37% | 43% | 2% | 42% | 22% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q2 'How often do you travel across the River Thames in east/southeast London for [purpose]?', Year 2 (base sizes as above)

Differences by age

- 12.15 The proportion reporting cross-river trips overall for any purpose decreases with age (41% among under 35s vs. 22% of those aged 65+).

Table 12.3: Travelling for journey purposes across the River Thames in East/ Southeast London at least once a week – by age group

| Above average scores are highlighted | All (n=1027) | 16-34 (n=426) | 35-44 (n=221) | 45-54 (n=160) | 55-64 (n=129) | 65+ (n=91) |
|---|--------------|---------------|---------------|---------------|---------------|------------|
| Travel to work (commuting) | 27% | 30% | 34% | 28% | 22% | 3% |
| Travel for work (business) | 10% | 10% | 10% | 14% | 9% | 0% |
| Travel to education | 4% | 8% | 2% | 0% | 1% | 0% |
| Travel for shopping and personal business | 13% | 12% | 10% | 14% | 16% | 14% |
| Leisure | 16% | 17% | 17% | 13% | 12% | 18% |
| Other reasons | 3% | 3% | 4% | 3% | 3% | 3% |
| One day a week or more for any purpose | 38% | 41% | 40% | 36% | 35% | 22% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q2 'How often do you travel across the River Thames in east/southeast London for [purpose]?', Year 2 (base sizes as above)

Differences by gender

- 12.16 Men were more likely than women to cross the river for all purposes except shopping or personal business, although the difference was small for this purpose. For commuting and business travel, the share of men crossing was significantly higher compared to women.

Table 12.4 Travelling for journey purposes across the River Thames in East/ Southeast London at least once a week – by gender

| Above average scores are highlighted | All (n=1027) | Men (n=531) | Women (n=496) |
|---|--------------|-------------|---------------|
| Travel to work (commuting) | 27% | 32% | 21% |
| Travel for work (business) | 10% | 13% | 6% |
| Travel to education | 4% | 4% | 3% |
| Travel for shopping and personal business | 13% | 12% | 13% |
| Leisure | 16% | 17% | 14% |
| Other reasons | 3% | 4% | 3% |
| One day a week or more for any purpose | 38% | 43% | 32% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q2 'How often do you travel across the River Thames in east/southeast London for [purpose]?', Year 2 (base sizes as above)

Differences by social grade

- 12.17 ABC1 respondents were significantly more likely than residents from lower social grades to cross the river at least once a week for any purpose (48% vs 23% C2DEs). Across all purposes except travel for education or 'other' trips, ABC1 respondents were more likely to make cross-river trips than C2DEs.

Table 12.5: Travelling for journey purposes across the River Thames in East/ Southeast London at least once a week – by social grade

| Above average scores are highlighted | All (n=1027) | ABC1 (n=603) | C2DE (n=423) |
|---|--------------|--------------|--------------|
| Travel to work (commuting) | 27% | 39% | 10% |
| Travel for work (business) | 10% | 13% | 6% |
| Travel to education | 4% | 2% | 7% |
| Travel for shopping and personal business | 13% | 13% | 12% |
| Leisure | 16% | 18% | 13% |
| Other reasons | 3% | 3% | 4% |
| One day a week or more for any purpose | 38% | 48% | 23% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q2 'How often do you travel across the River Thames in east/southeast London for [purpose]?', Year 2

Differences by ethnicity

- 12.18 Respondents from White ethnic backgrounds were more likely to cross the river for any trip type once a week or more. Asian residents and people from Mixed/ Chinese/ Other ethnic groups were more likely than average to travel across the river for education.
- 12.19 The proportion of White residents travelling at least weekly for any purpose significantly increased compared to year one (40% vs 33% in 2021).

Table 12.6: Travelling for journey purposes across the River Thames in East/ Southeast London at least once a week – by ethnicity

| Above average scores are highlighted | All (n=1027) | Asian (n=239) | Black (n=145) | Mixed/ Chinese/ Other (n=84) | White (n=558) |
|---|--------------|---------------|---------------|------------------------------|---------------|
| Travel to work (commuting) | 27% | 23% | 26% | 27% | 29% |
| Travel for work (business) | 10% | 12% | 8% | 6% | 10% |
| Travel to education | 4% | 7% | 4% | 6% | 2% |
| Travel for shopping and personal business | 13% | 9% | 7% | 11% | 16% |
| Leisure | 16% | 12% | 7% | 15% | 20% |
| Other reasons | 3% | 4% | 4% | 2% | 3% |
| One day a week or more for any purpose | 38% | 34% | 34% | 38% | 40% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q2 'How often do you travel across the River Thames in east/southeast London for [purpose]?', Year 2 (base sizes as above)

Differences by disability

- 12.20 Respondents who have a disability were much less likely to travel for all purposes across the Thames.
- 12.21 Among non-disabled respondents, the share of travel for any purpose at least once a week saw a significant increase compared to wave one (41% vs 35% in 2021).

Table 12.7: Travelling for journey purposes across the River Thames in East/ Southeast London at least once a week – by disability

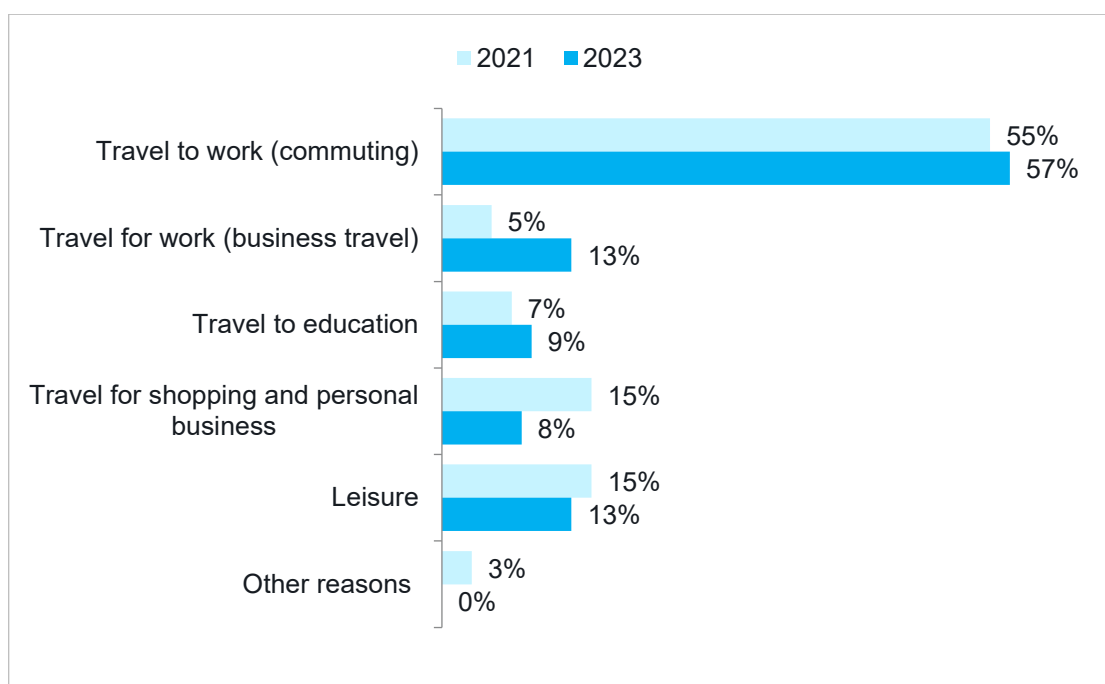
| Above average scores are highlighted | All (n=1027) | Has a disability (n=107) | Does not have a disability (n=907) |
|---|--------------|--------------------------|------------------------------------|
| Travel to work (commuting) | 27% | 5% | 30% |
| Travel for work (business) | 10% | 3% | 11% |
| Travel to education | 4% | 0% | 4% |
| Travel for shopping and personal business | 13% | 11% | 13% |
| Leisure | 16% | 10% | 16% |
| Other reasons | 3% | 1% | 4% |
| One day a week or more for any purpose | 38% | 13% | 41% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q2 'How often do you travel across the River Thames in east/southeast London for [purpose]?', Year 2 (base sizes as above)

Most frequent purpose of cross-river trips

- 12.22 Those who make a regular cross-river trip were asked the most frequent purpose they cross the river for. The shares of respondents making journeys for each purpose are shown in Figure 12.2. The most frequently mentioned purpose was commuting, by over half of respondents (57%).
- 12.23 The proportion travelling for business at least once a week is significantly higher compared to 2021, whereas the proportions of trips for shopping and personal business as well as for 'other' purposes are significantly lower.

Figure 12.2 Most common journey purposes crossing the River Thames in east/southeast London made by those who cross the river once a week or more for any purpose



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q19a 'Earlier you said that you cross the River Thames in east/southeast London for the following purposes. Which one do you do most often? All who cross the river once a week or more for any purpose; Year 1 (n=366); Year 2 (n=386)

Differences by local authority

- 12.24 The share of respondents commuting was above average in Lewisham, Southwark and Greenwich. Business travel across all boroughs was below average apart from Newham which was disproportionately high (29% vs 13% average).
- 12.25 The share taking leisure trips was above average for Southwark, Greenwich and Tower Hamlets residents.

Differences by age

- 12.26 Respondents aged 35-54 were more likely than average to travel for commuting whereas 45-54 years olds were more likely to make business journeys.
- 12.27 The share traveling for shopping and personal business trips was twice the average among the 55-64 age group.
- 12.28 Leisure journeys were more commonly selected by residents aged 55+.

Differences by gender

- 12.29 Commutes and travel for business purposes were slightly higher among men than women, while shopping or personal business as well as leisure were much higher among female residents.
- 12.30 Trips for education purposes were even across both genders (9% each).

Differences by social grade

- 12.31 ABC1 respondents were much more likely to commute (70% vs 18% of C2DE respondents). Conversely, travel for education was much higher among C2DEs (27% vs. 3% of ABC1s). Residents from lower socio-economic grades had also higher than average shares of cross-river trips for the remaining purposes.

Differences by ethnicity

- 12.32 Respondents from Black and White ethnic backgrounds were more likely than other groups to commute across the Thames (62% and 61% respectively).
- 12.33 Respondents from Asian backgrounds were twice as likely as the average to select travel for business as the most frequent type of Thames crossing (25% vs 13% average). This was also true for cross-river trips for education among this group (21% vs 9% average).
- 12.34 Leisure was slightly above average among White respondents.

Differences by disability

- 12.35 The base size is not large enough to look at river crossing journey purpose by disability.

Regular River Crossings

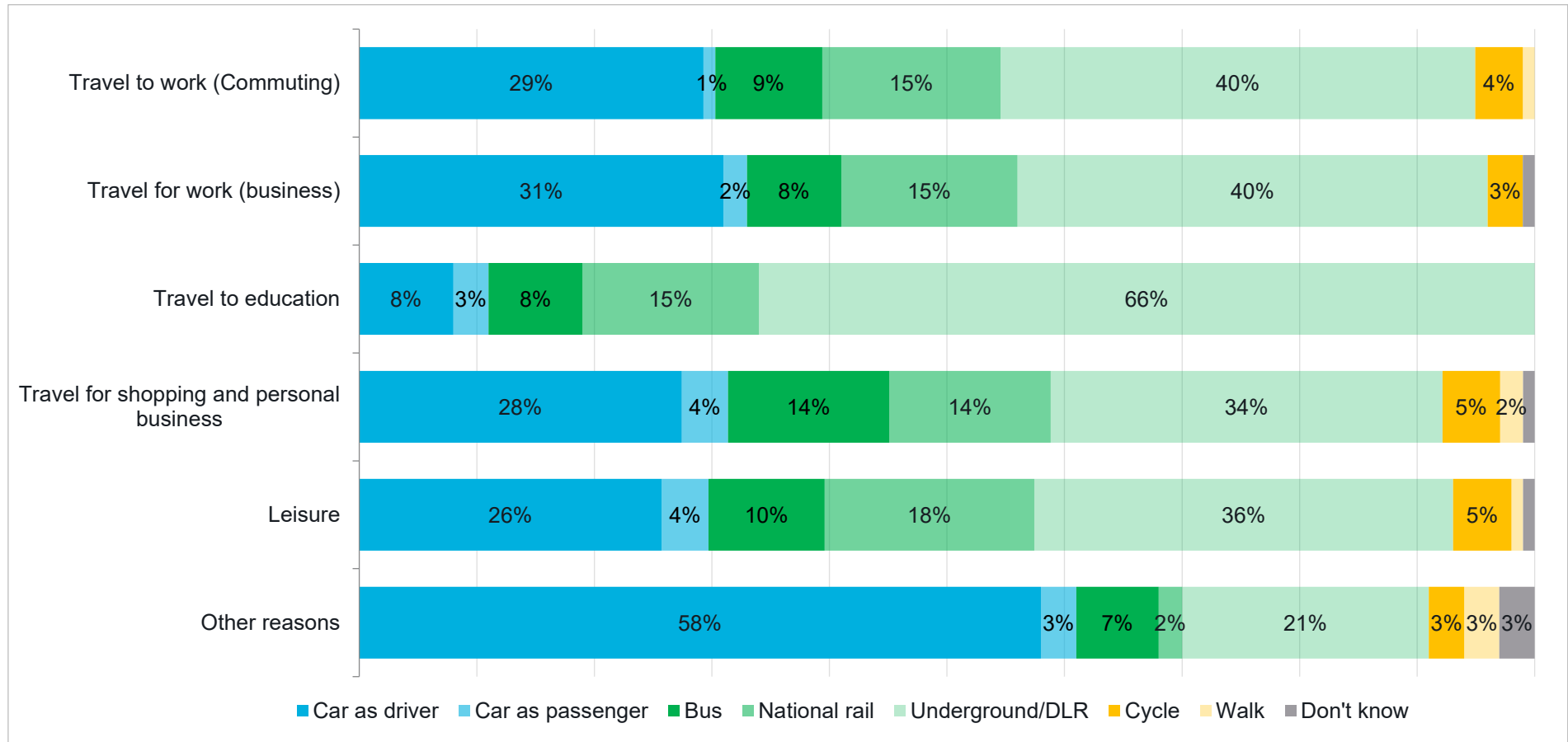
Modes used

- 12.36 For regular (one or more times a week) cross-river trips, respondents were asked how they usually travelled. The modes used are shown in Figure 12.3, and summarised in

Table 12.8. Base sizes for cross-river trips for education and other reasons are too small to allow robust analysis.

- 12.37 Public transport accounts for the largest shares, with Underground/ DLR being the most mentioned transport option for all trip types crossing the Thames.
- 12.38 The share using National Rail significantly increased compared to wave one, in particular, for leisure (18% vs 5% in 2021) and commute (15% vs 5% in 2021). It is possible that the Elizabeth Line accounts for some of this increase as it opened between the two waves, crosses the Thames near the study area, and does not have a dedicated response option in the question.
- 12.39 The proportion of residents using Underground/ DLR for commuting purposes dropped from 55% in wave one to 40% in 2023, but grew for business travel (from 25% in wave one to 40% in 2023)
- 12.40 Car is the second most common transport option for all journey types. However, the share using it for business travel dropped to 31% from 51% in 2021.
- 12.41 Few residents walk or cycle to cross the river.

Figure 12.3 Transport modes used for regular (once a week or more often) cross-river trip purposes



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q4-8b: 'You said you travel across the River Thames in east/southeast London for [purpose], how do you usually travel? All who cross the River Thames for the purpose one or more times a week; Base size vary per trip purpose: commute (n= 277); business travel (n=102); **travel for education (n=38)**; shopping and personal business trips (n=130); leisure trips (n=160); **trips for other reasons (n=34)**. **Sample sizes are low and should be treated with caution.**

- 12.42 Table 12.8 gives an overview of transport mode usage based on the combination of all mode use questions asked. Among those who cross the River Thames once a week or more for any purpose, a third (34%) use a car (either as a driver or as a passenger), and almost two thirds (64%) use public transport. Only 4% walk or cycle for these cross-river journeys.
- 12.43 At a total level, crossing the river using car for any purpose at least once a week has dropped by nine points compared to 2021 (43% in wave one), while the share using active travel have doubled since wave one (2% in 2021). There is little variation for public transport across the waves (with a 1% increase from wave one).
- 12.44 Looking at trip types, the share of residents using a car for business travel, shopping and personal business and leisure are also lower than in 2021. Conversely, the share of residents travelling by public transport for these trip types are higher than in wave one.

Table 12.8: Overall mode use profile among those who cross the River Thames for the purpose at least once a week

| | Number of responses | Car (driver or passenger) | Public transport | Walk or cycle |
|---|---------------------|---------------------------|------------------|---------------|
| Any purpose 1+ times a week | 386 | 34% | 64% | 4% |
| Travel to work (Commuting) | 277 | 31% | 65% | 5% |
| Travel for work (business) | 102 | 33% | 63% | 3% |
| Travel to education | 38 | 11% | 89% | 0% |
| Travel for shopping and personal business | 130 | 32% | 62% | 6% |
| Leisure | 160 | 29% | 64% | 6% |
| Other reasons | 34 | 62% | 29% | 6% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q4-8b: 'You said you travel across the River Thames in east/southeast London for [purpose], how do you usually travel?', Year 2 (base sizes as above) **Sample sizes are low and should be treated with caution.**

Differences by local authority

- 12.45 At a summary level, residents in Lewisham and Newham were the most likely to use a car (as a driver or passenger) to cross the river at least once a week, whereas respondents from Southwark, Greenwich and Tower Hamlets were more likely than average to use public transport.

Differences by age

- 12.46 Overall, people aged between 35-64 were most likely to cross the Thames by car (as a driver or passenger). Public transport had larger shares across all age groups, in particular among younger people (under 35s) and 55-64s.

Differences by gender

- 12.47 In general, men were more likely than women to use the car, in particular as a driver, to cross the river for all purposes on one or more days a week, while women were much more likely than men to be a passenger. They were also much more likely than men to travel by public transport, in particular using National Rail services (21% vs 12% of men).

Differences by social grade

- 12.48 Overall, car usage (as a driver or passenger) was much higher among C2DE respondents, while public transport use was higher for ABC1 respondents.
- 12.49 For commuting, Underground/ DLR and car (as a driver) were the most popular modes among both ABC1 (38% and 28%) and C2DE residents (52% and 38%) but only ABC1 commuters were likely to use National Rail or Bus services (18% and 10% respectively vs. 2% for each among C2DE commuters).
- 12.50 Cycling had a larger share of ABC1s whereas walking was more popular among C2DEs.

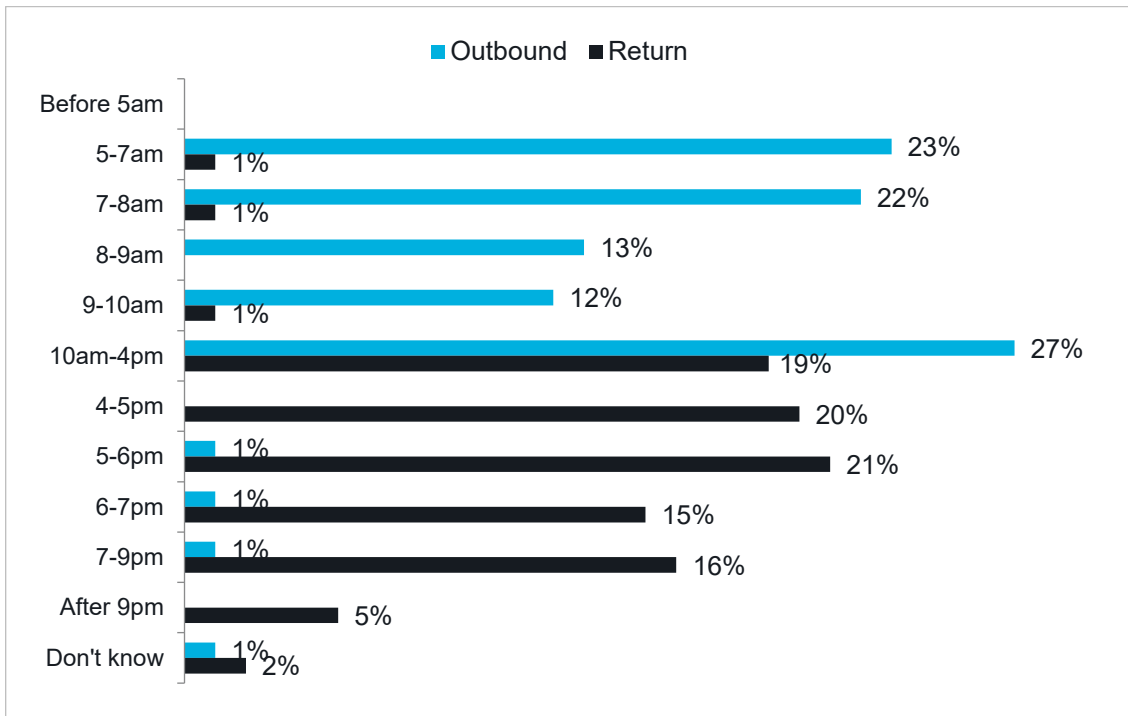
Differences by ethnicity

- 12.51 Across all purposes, car use (as a driver or passenger) was higher for Asian and Black respondents than others, consequently public transport use was relatively low for these groups. Cycling was higher among White respondents (6% vs no respondents in the Black or Asian subgroups).
- 12.52 The base sizes were too low to make comparisons between disabled and non-disabled residents.

Usual times crossing the river

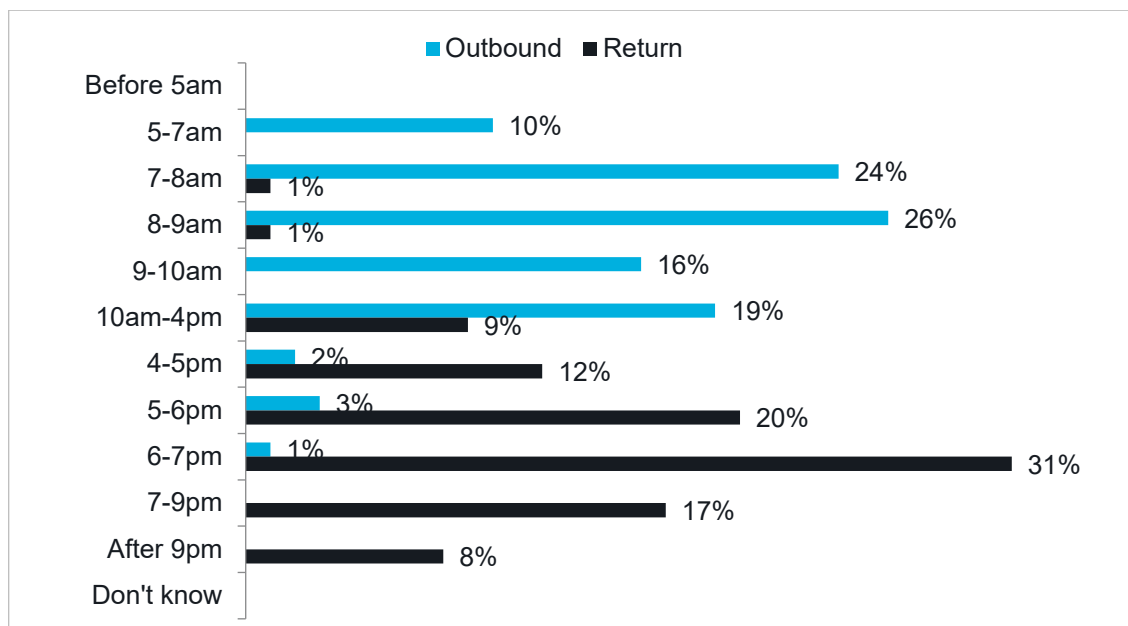
- 12.53 For those using a car (as a driver or passenger) for their frequent cross-river trips, the majority of residents make their outbound journeys before the peak commuter time (i.e. before 8am), whereas the returns were after 4pm, with trips between 4pm and 6pm being most frequent. The return trips were also more evenly distributed between the time bands, as seen in Figure 12.4.
- 12.54 Outbound trips made between 5am and 7am are significantly higher than in 2021 (23% vs 13% in 2021) whereas return trips between 7pm and 9pm are significantly lower than in wave one (5% vs 13% in 2021).
- 12.55 The travel time profile for public transport trips is shown in Figure 12.5. Public transport trips were slightly different to car trips and were more likely to be made during commuting hours (between 7am and 9am). Return journeys were more common after 6pm, in particular between 6pm and 7pm.
- 12.56 In addition, outbound trips by public transport between 7-8am significantly increased compared to 2021 (24% vs 11% in 2021). The other journey timings saw less significant differences compared to wave one.
- 12.57 Bases were too small to look at distribution by Local Authority, age, disability, or ethnicity.

Figure 12.4 Usual times crossing the river by a car (as a driver or passenger) for any journey purposes



Source: TfL, Silvertown Tunnel socio-economic monitoring; Q15/ 17: 'You said you travel across the River Thames by car as a driver or as a passenger, at what time do you usually cross the river?' All who cross the river once a week or more for any purpose; Year 2 (n=131)

Figure 12.5 Usual times crossing the river by public transport for any journey purposes



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q16/ 18: 'You said you travel across the River Thames by public transport for any purpose, at what time do you usually cross the river?' All who cross the river once a week or more for any purpose; Year 2 (n=249)

Differences by gender

- 12.58 By car, the outbound journeys made by women were spread across the morning hours (typically around 15% for each time slot between 5am and 10am) whereas men were more likely to make outbound journeys between 5am and 8am (53%).
- 12.59 Return trips for male respondents were more likely after 4pm, in particular between 5-6pm, whereas for female respondents they were more likely before 5pm. Return trips after 9pm were not generally mentioned by women.
- 12.60 Trips by public transport for men were more likely between 7-9am, whereas trips for women were spread across the day (between 7am and 4pm), with one third (28%) travelling between 8-9am.
- 12.61 For return trips men tend to travel between 5pm and 9pm whereas women between 5-7pm. Very few women travel after 9pm.

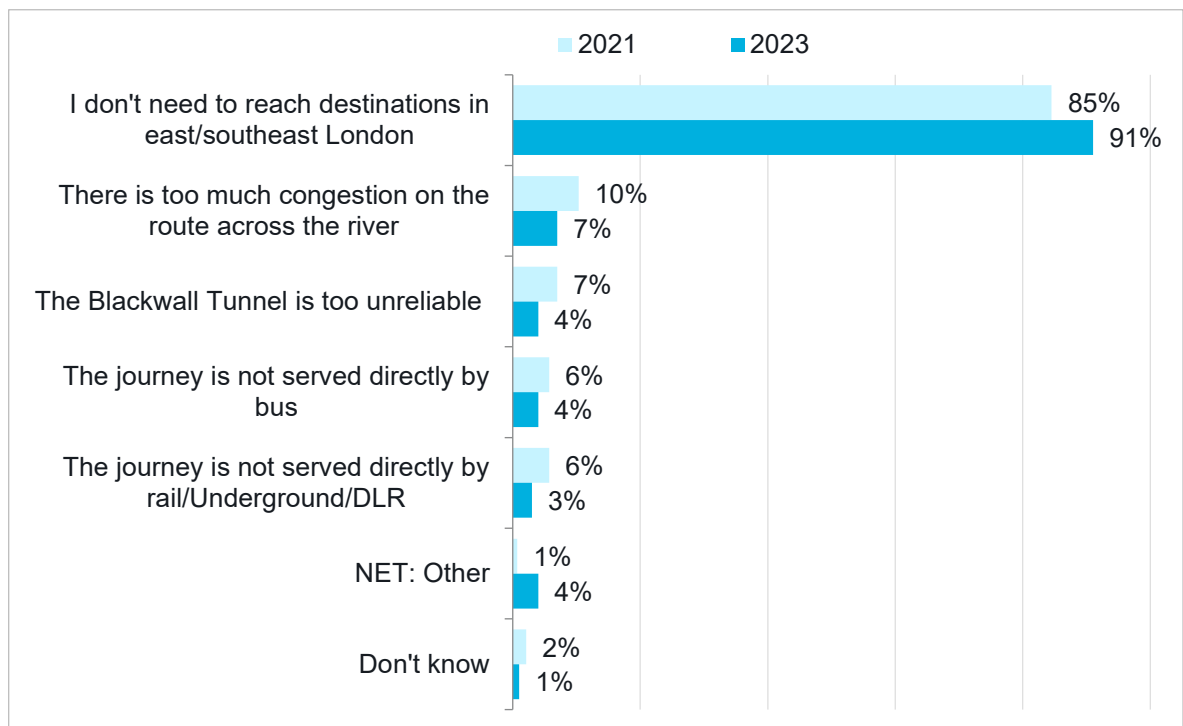
Differences by social grade

- 12.62 For car travel outbound, ABC1s were more likely to travel between 5-8am while for C2DEs the most likely travel period was between 10am and 4pm.
- 12.63 For return journeys by car, residents from higher social grades tend to make these trips from 5-6pm, whereas C2DEs were more likely to travel between 10am and 5pm and in the evening, between 7-9pm.
- 12.64 Public transport outbound trips by ABC1 respondents were more likely to be between 7am and 9am, whereas C2DEs were more likely to travel between 7-8am and 10am and 4pm.
- 12.65 Return trips by public transport were typically made by ABC1s between 5-9pm, in particular between 6pm and 7pm, while return trips for C2DE respondents were evenly spread throughout the day (between 10am and 9pm).

Reasons for Not Crossing the River

- 12.66 Residents who do not currently cross the river frequently were asked for the reasons why.
- 12.67 The vast majority (91%) said that there was no need for them to reach destinations which require a river crossing. This is a significant increase from 2021 and probably reflects the currently available transport options rather than the future infrastructure and increased connectivity provided by the Tunnel.
- 12.68 All the other responses were given by shares smaller than 10% which were also lower than the shares in 2021. There was little in terms of significant differences when looking at responses by gender, social grade and disability.

Figure 12.6 Reasons for not crossing the river more often among those who do not cross the river regularly



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q21: Why don't you cross the river/cross more often? All who do not cross the river frequently; Year 1 (n=717), Year 2 (n=637)

Differences by local authority

- 12.69 Tower Hamlets residents were less likely than others to say they do not need to reach destinations in East/ Southeast London (82% vs over 90% in other boroughs).

Differences by age

- 12.70 While the general distribution of answers was similar across age groups, residents aged 35-44 and 55-64 were the most likely to state that they have no reasons to reach destinations across the Thames.

Differences by ethnicity

- 12.71 The distribution of responses was similar to the average; however, Asian and Black respondents were more likely than others to say 'the journey is not served directly by

bus’ and ‘the Blackwall Tunnel is too unreliable’. Residents from Black ethnic backgrounds were also much more likely to point to congestion as the main reason.

Ease of Crossing the Thames

Rating ease of crossing

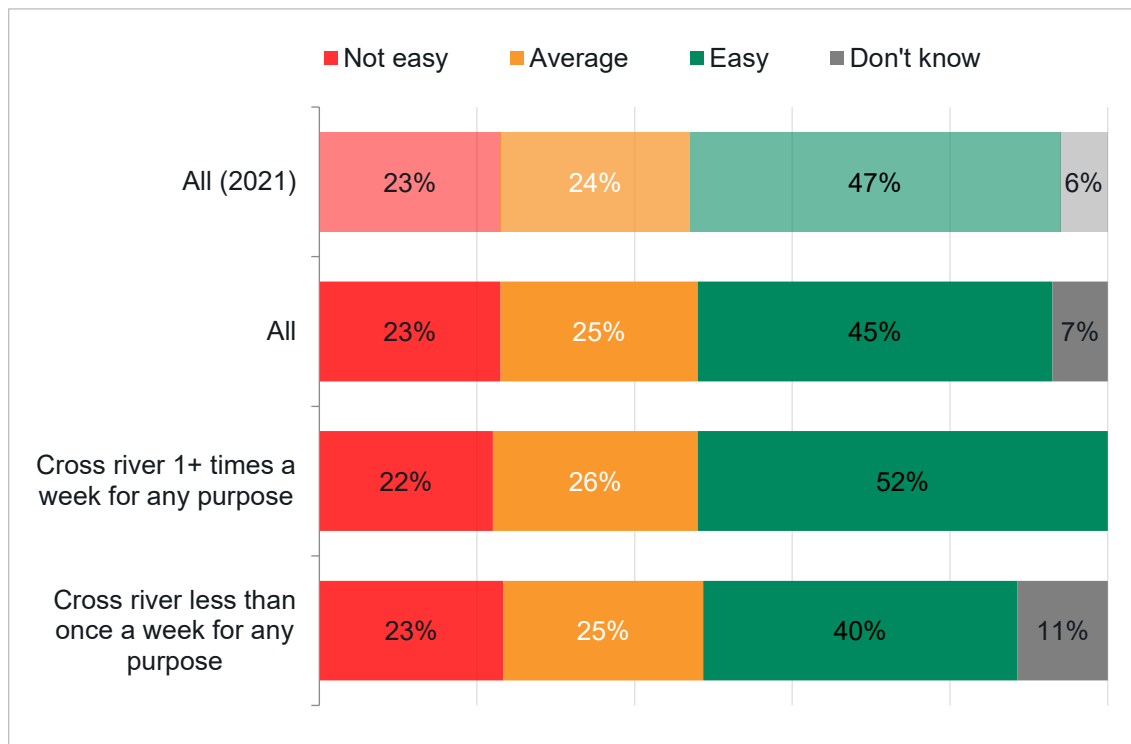
- The ease of crossing the river was captured by using a rating scale, where 1 meant ‘not easy to get across the River Thames in east/ southeast London’, to 6 meaning ‘it’s very easy’. Ratings have been grouped as follows:
 - A rating of 1 or 2 – Not Easy
 - A rating of 3 or 4 – Average
 - A rating of 5 or 6 – Easy.

12.72 Figure 12.7 shows how these ratings break down among those who cross the river regularly and those who do not.

12.73 The share saying ‘easy’ was much higher among those who cross the river regularly compared to those who do not (52% vs 40%). The shares who give ‘average’ or ‘not easy’ scores were similar across the two groups. Over one in ten who do not cross the river regularly stated ‘don’t know’.

12.74 There are small differences in the rating scores across the two waves, with over two in five (45%) respondents rating the river crossing as ‘easy’ compared to 47% in 2021. Those who cross the Thames for at least one trip type were also slightly less likely to say it is ‘easy’ in 2021 than in 2023 (52% vs 55% in 2021).

Figure 12.7 Ease of crossing the River Thames



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q22: Overall, how easy is it for you to get across the River Thames in east/southeast London? Please give your answer on a scale of 1 to 6,

where 1 means it's not easy and 6 means it's very easy; Year 1 (n=1096), Year 2 (n=1027; cross the river at least once a week n=385; cross the river less than once a week n=641)

Differences by local authority

12.75 Respondents in Greenwich and Southwark were the most likely to say crossing the river is easy. All other boroughs had higher than average shares of 'not easy' responses, and Newham respondents were more likely than others to state 'don't know'.

Table 12.9: Ease of crossing the Thames- by Local authority

| Above average highlighted | Total (n=1027) | Greenwich (n=131) | Lewisham (n=139) | Newham (n=256) | Redbridge (n=58) | Southwark (n=145) | Tower Hamlets (n=221) |
|---------------------------|----------------|-------------------|------------------|----------------|------------------|-------------------|-----------------------|
| Not easy | 23% | 14% | 31% | 25% | 33% | 6% | 30% |
| Average | 25% | 26% | 33% | 26% | 15% | 28% | 16% |
| Easy | 45% | 60% | 35% | 38% | 45% | 56% | 43% |
| Don't know | 23% | 0% | 2% | 25% | 7% | 10% | 11% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q22: 'Overall, how easy is it for you to get across the River Thames in east/southeast London?'; Year 2 (bases sizes as above)

Differences by gender

12.76 Men were significantly more likely than women to say that crossing the river is easy whereas women were significantly more likely to rate it as average.

Table 12.10: Ease of crossing the Thames- by Local authority

| Above average highlighted | Total (n=1027) | Men (n=531) | Women (n=496) |
|---------------------------|----------------|-------------|---------------|
| Not easy | 23% | 27% | 19% |
| Average | 25% | 21% | 30% |
| Easy | 45% | 48% | 41% |
| Don't know | 23% | 5% | 10% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q22: 'Overall, how easy is it for you to get across the River Thames in east/southeast London?'; Year 2 (bases sizes as above)

Differences by age

12.77 Under 35s were slightly more likely than others to rate crossing the river as 'easy', while over 35s were more likely to give it 'average' or 'not easy' scores.

Table 12.11: Ease of crossing the Thames - by age group

| Above average highlighted | Total (n=1027) | 16-34 (n=426) | 35-44 (n=221) | 45-54 (n=160) | 55-64 (n=129) | 65+ (n=91) |
|---------------------------|----------------|---------------|---------------|---------------|---------------|------------|
| Not easy | 23% | 23% | 23% | 24% | 26% | 18% |
| Average | 25% | 21% | 29% | 30% | 23% | 30% |
| Easy | 45% | 48% | 44% | 36% | 43% | 45% |
| Don't know | 23% | 8% | 4% | 10% | 8% | 9% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q22: ‘Overall, how easy is it for you to get across the River Thames in east/southeast London?’; Year 2 (bases sizes as above)

Differences by social grades

12.78 Residents from higher social grades were more likely than C2DEs to state ‘easy’ or ‘average’, whereas C2DEs were much more likely to say ‘don’t know’ compared to ABC1 residents.

Table 12.12: Ease of crossing the Thames- by social grades

| Above average highlighted | Total (n=1027) | ABC1s (n=603) | C2DEs (n=423) |
|---------------------------|----------------|---------------|---------------|
| Not easy | 23% | 23% | 23% |
| Average | 25% | 26% | 24% |
| Easy | 45% | 48% | 39% |
| Don't know | 23% | 3% | 14% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q22: ‘Overall, how easy is it for you to get across the River Thames in east/southeast London?’; Year 2 (bases sizes as above)

Differences by ethnicity

12.79 Respondents from White and Mixed/ Chinese/ Other ethnic backgrounds were more likely than average to rate the river crossing as ‘easy’. The remaining ethnic groups were more likely to give it ‘not easy’ or ‘average’ scores.

Table 12.13: Ease of crossing the Thames- by ethnicity

| Above average highlighted | Total (n=1027) | Asian (n=239) | Black (n=145) | Mixed/ Chinese/ Other (n=84) | White (n=558) |
|---------------------------|----------------|---------------|---------------|------------------------------|---------------|
| Not easy | 23% | 33% | 27% | 21% | 18% |
| Average | 25% | 26% | 27% | 22% | 25% |
| Easy | 45% | 31% | 38% | 48% | 52% |
| Don't know | 23% | 11% | 7% | 9% | 5% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q22: ‘Overall, how easy is it for you to get across the River Thames in east/southeast London?’; Year 2 (bases sizes as above)

Differences by disability

12.80 Non-disabled residents were significantly more likely than people with disabilities to say it is easy to cross the river. The share saying it is ‘average’ or ‘don’t know’ was higher for disabled residents than non-disabled respondents.

Table 12.14: Ease of crossing the Thames- by disability

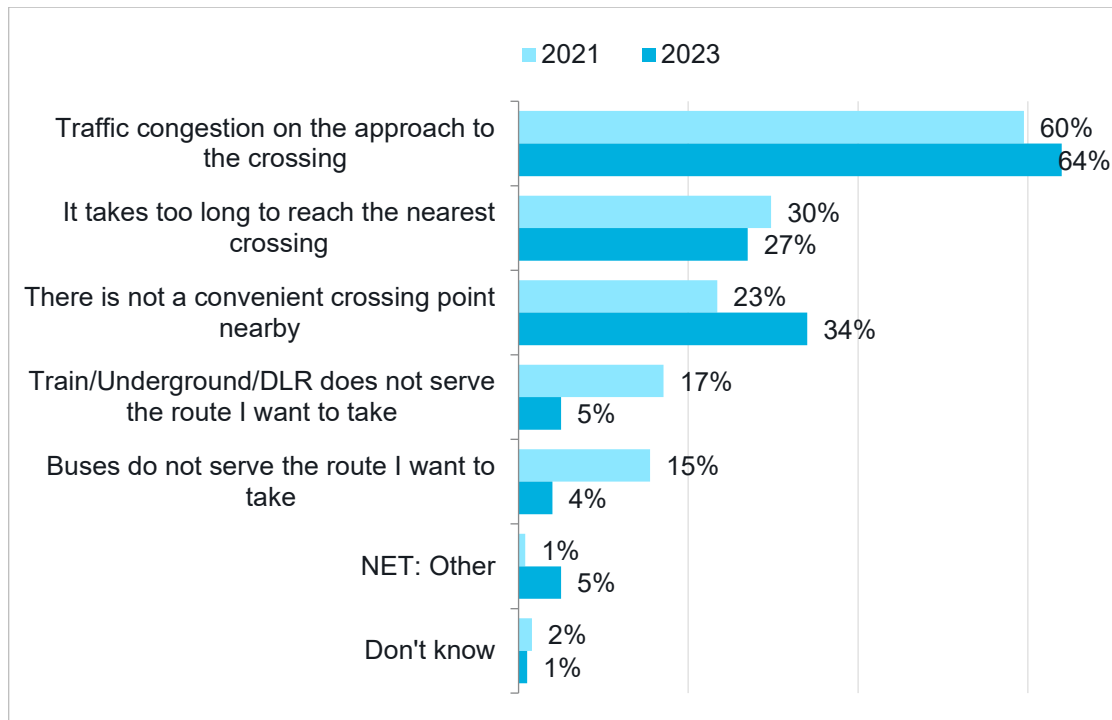
| Above average highlighted | Total (n=1027) | Has a disability (n=107) | Does not have a disability (n=907) |
|---------------------------|----------------|--------------------------|------------------------------------|
| Not easy | 23% | 23% | 23% |
| Average | 25% | 31% | 24% |
| Easy | 45% | 32% | 46% |
| Don't know | 23% | 15% | 6% |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q22: ‘Overall, how easy is it for you to get across the River Thames in east/southeast London?’; Year 2 (bases sizes as above)

Reasons for difficulties

- 12.81 Residents who rated crossing the river as difficult were asked to provide a reason for their rating. The summary of responses is shown in Figure 12.8. Nearly two thirds (64%) stated that traffic congestion was the main reason for this.
- 12.82 Over one third (34%) said there is not a convenient crossing point nearby, which is a significant increase from 2021. However, the share of residents saying there are no public transport options to cross the Thames was significantly lower this year than in 2021.
- 12.83 Male respondents were significantly more likely than female respondents to mention congestion on the approach to the crossing (67% vs 57% respectively). They were also more likely to state that there is no convenient crossing nearby or it takes too long to reach it. Women, on the other hand, were more likely than men to mention lack of available transport options to cross the river as their main reasons.
- 12.84 It is not possible to look at local authority, age, ethnicity, or disability due to low base sizes.

Figure 12.8 Reasons for finding crossing the Thames difficult



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q23: ‘You said it’s not very easy for you to get across the River Thames in east/southeast London, why is that?’; All who selected ‘1 or 2’ at Q22, Year 1 (n=252), Year 2 (n=237)

13 Resident Survey Findings: Changes to Travel Patterns

- 13.1 This section looks at how respondents, who make regular river crossings, have changed their journeys in the last year. It considers changes in mode, time and crossing used, and reasons for the changes.
- 13.2 The 2021 findings very much reflected the restrictions associated with the pandemic, while this year's results are more likely to capture more regular, post-pandemic, social and economic activities. Therefore, as expected, there are significant differences between the waves.
- 13.3 Wave two, along with wave one, contributes to the baseline describing pre tunnel conditions; the main interest will be the degree of change in these indicators, relative to the baseline, following the opening of the tunnel.
- 13.4 The survey results reveal:
- One in ten residents have changed mode for their regular cross-river trips in the last year. Among these changes, car to public transport switches are the most mentioned, with changes made across public transport options also being common. The most frequent reason for this change is car congestion that affects journey length and reliability.
 - Five percent of those who cross the river regularly have changed the main river crossing they use, switching from Blackwall Tunnel to other alternatives, in particular the Rotherhithe Tunnel. Car congestion is also the most mentioned reason for this change.
 - There have been significant changes in journey time for regular cross-river trips compared to 2021: 14% have shifted the journey earlier, while 12% have moved it later. Residents commonly mentioned that preferences for less busy roads or less busy public transport as well as work requirements are the reasons for this change.

Change of mode

- 13.5 The change in mode is shown in Table 13.1. Number of respondents has been used due to the small sample sizes. Among those who make a regular journey crossing the River Thames, 10% said they had changed the main mode they use for this journey in the last year; this is a significant increase from 5% in 2021.
- 13.6 Similarly to wave one, there have been more switches from car than from public transport. However, this year, there have been more changes among public transport modes (e.g. from national rail to bus/ underground/ DLR).
- 13.7 In 2023, as seen in Table 13.2Table 13.1 the most mentioned reason for the change is car congestion (journeys being unreliable or taking too long). In 2021 the main reason was concern about coronavirus – an option that is no longer asked in the survey.
- 13.8 Samples were too small to look at subgroups of respondents.

Table 13.1: Change of transport mode for the same journey made in the last year

| Mode | Changed from | Mode change to | 2023 (n=40) |
|------------------|--------------------|-----------------------|-------------|
| Public Transport | Bus | National rail | 1 |
| | National rail | Bus/ Underground/ DLR | 7 |
| | Underground/ DLR | National rail | 5 |
| | | Car as a passenger | 2 |
| Total | | | 15 |
| Car | Car as a driver | Bus/ Underground/ DLR | 9 |
| | | National rail | 10 |
| | | Cycle | 1 |
| | | Car as a passenger | 2 |
| | Car as a passenger | Bus/ Underground/ DLR | 3 |
| | Total | | |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q10: ‘For the cross-river journey you make most often, which mode have you changed from/ to for this journey in the last year?’ All who have changed modes for regular cross-river trips in the last year; Year 2 (n=40)

Table 13.2: Reasons for changing the transport mode (sorted by the largest to smallest number of responses in 2023)

| Common reasons | 2021 (n=21) | 2023 (n=40) |
|--|-------------|-------------|
| Congestion on the car route means the journey time is unreliable | 5 | 23 |
| Congestion on the car journey means journey takes too long | 5 | 19 |
| Congestion on the bus route means the journey time is unreliable | 2 | 12 |
| Car costs are too expensive for me | 5 | 11 |
| Congestion on the bus route means journey takes too long | 1 | 10 |
| Public transport costs are too expensive for me | 4 | 8 |
| New public transport service became available | 2 | 7 |
| Avoiding the central London congestion charge | 0 | 6 |
| NET: Other | 4 | 5 |
| Changed job/shift time/work location | 2 | 2 |
| Moved house | 1 | 1 |
| Concerns about coronavirus | 9 | 0 |
| Started/stopped undertaking childcare or caring duties | 1 | 0 |
| Gained access to a car/van | 1 | 0 |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q11: ‘And what was the reason you made this change of mode?’ All who have changed modes for regular cross-river trips in the last year; Year 1 (n=21), Year 2 (n=40)

Change of crossing used

- 13.9 Table 13.3 shows the river-crossing changes in numbers of respondents rather than percentages due to the low sample size.
- 13.10 Nineteen (5%) of those who cross the river regularly, had changed the main river crossing they usually use, representing a 2% increase from 2021. The main switches are from the Blackwall Tunnel to other alternatives, mainly the Rotherhithe Tunnel.

Table 13.3: River-crossing changes (from/to) in the last year

| Which crossing have you changed from? | Which crossing have you changed to? | 2023 (n=19) |
|---------------------------------------|-------------------------------------|-------------|
| Blackwall Tunnel | Rotherhithe Tunnel | 7 |
| | Dartford Crossing | 2 |
| | Tower Bridge | 2 |
| | Woolwich Ferry | 2 |
| Rotherhithe Tunnel | Tower Bridge | 2 |
| | Woolwich Ferry | 1 |
| Tower Bridge | Rotherhithe Tunnel | 1 |
| | Blackwall Tunnel | 1 |
| London Bridge | Waterloo Bridge | 1 |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q13: ‘For the cross-river journey you make most often, which river crossing have you changed from/ to in the last year?’ All who have changed river crossing used for regular cross-river trips in the last year; Year 2 (n=19)

- 13.11 The reasons given for this change in crossing are shown in Table 13.4. The top two responses relate to congestion for car journeys, while the next two relate to congestion on bus journeys. The same top answers were given in 2021.
- 13.12 Sample sizes were too small to look at subgroups of respondents.

Table 13.4: Reasons for changing the river crossing

| Reasons for change the river crossing | 2023 (n=18) |
|--|-------------|
| Congestion on the car journey means the journey time is unreliable/unpredictable | 12 |
| Congestion on the car journey means journey takes too long | 11 |
| Congestion on the bus route means the journey time is unreliable | 8 |
| Congestion on the bus route means journey takes too long | 7 |
| Changed job/shift time/work location | 5 |
| New public transport service became available | 4 |
| Avoiding the central London congestion charge | 3 |
| Moved house | 2 |
| Gained access to a car/van | 2 |
| Net - Other | 1 |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q13: ‘And what is the reason for changing the river crossing that you use most often?’ All who have changed river crossing used for regular cross-river trips in the last year; Year 2 (n=18)

Change in travel times

- 13.13 Changes are shown in Table 13.5 in numbers of respondents due to the low sample sizes.
- 13.14 In the last year, there have been significant shifts in the journey times among those who make a regular cross-river trip compared to 2021. The share of respondents who had changed their journey time to an earlier departure has more than tripled since 2021 (14% vs 4% in wave one), while the proportion that had moved it later nearly doubled (from 7% in 2021 to 12%). The main reasons given for travelling earlier or later are preferences for travelling when the roads or public transport are less busy, as well as work requiring travel earlier or later.
- 13.15 Sample sizes were too small to look at subgroups of respondents.

Table 13.5: Main reasons for changing the journey time

| Main reasons | Yes - earlier | Yes – later |
|---|---------------|-------------|
| Prefer to travel when the roads are less busy | 19 | 15 |
| Prefer to travel when public transport is less busy | 15 | 13 |
| My work requires me to travel earlier/later | 10 | 8 |
| Childcare or caring commitments require me travel earlier/later | 2 | 3 |
| Moved house | 2 | 3 |
| Avoiding the central London congestion charge | 1 | 1 |
| New public transport service became available | 0 | 2 |
| Other | 1 | 1 |
| Changed job | 0 | 1 |
| Don't know | 1 | 0 |
| Total | 51 | 47 |

Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q20: ‘What’s the main reason you changed the time of day you usually make your journey?’ All who have changed time of day for regular cross-river trips in the last year; Year 2 (n=100)

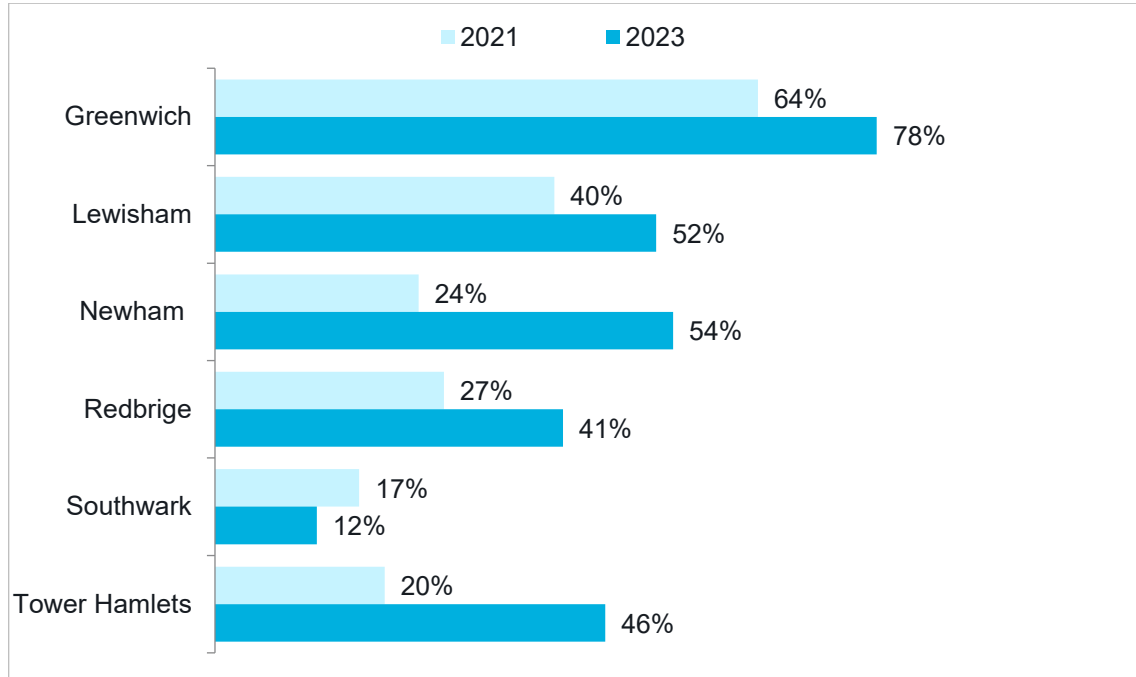
14 Resident Survey Findings: The Silvertown Tunnel

- 14.1 The survey sought to understand awareness levels of the future Silvertown Tunnel, and how respondents are impacted by the availability of river crossings for walking, cycling and public transport. Media coverage of the tunnel investment is modest since construction is still ongoing, hence moderate levels of awareness were expected from residents. The figures here provide a baseline for comparison in future waves once construction has progressed further.
- 14.2 Generally, awareness of the Silvertown Tunnel has increased significantly compared to wave one with nearly half of residents stating that they are aware of it. Perhaps not surprisingly, awareness was higher among those who make regular cross-river journeys as well as residents of Greenwich, who are more likely to know about the Tunnel due to geographic proximity.
- 14.3 Over half (57%) of respondents do not think the current lack of river crossings for public transport, walking and cycling impacts the journeys they make. In 2023 a significantly lower share of residents state this ‘impacts them a lot’ when compared to 2021. These results should be interpreted in the context of the currently available travel and connectivity options in the area, and not a measure of ‘unmet need’. The tunnel will bring new travel options which, over time, will attract trips that reflect and rely on the new connectivity provided.

Awareness

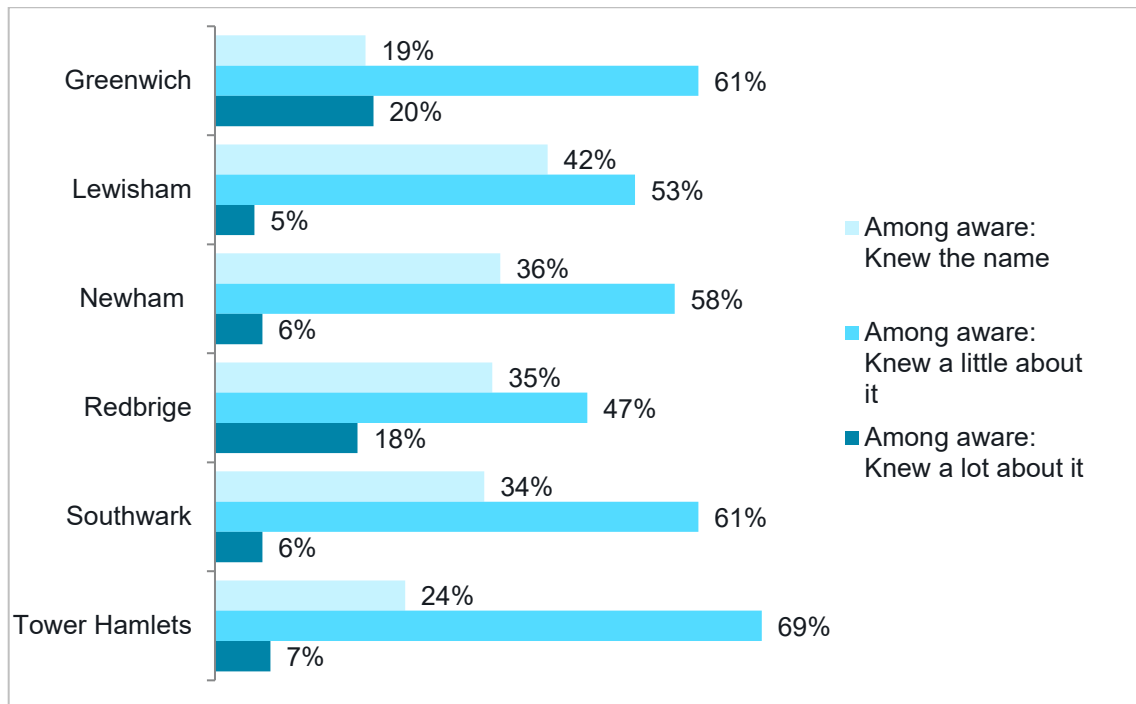
- 14.4 The final question in the survey asked about awareness of the Silvertown Tunnel. This year it was followed up by a new question to better understand the level of familiarity by asking the following options:
- I only knew the name
 - I knew a little about it [the Silvertown Tunnel]
 - I knew a lot about it [the Silvertown Tunnel]
- 14.5 Overall, nearly half (49%) of residents are aware of the Silvertown Tunnel which is a 20-point increase from wave one (29% in 2021). Awareness was significantly higher among those who make regular cross-river journeys (60% vs 42% who do not make such trips).
- 14.6 Figure 14.1 shows how aware and knowledgeable residents in different boroughs are about the Tunnel. By borough of residence, awareness varied from 78% among Greenwich respondents to just 12% of Southwark respondents. Greenwich residents are also most knowledgeable about the Tunnel compared to other boroughs.

Figure 14.1 Awareness of the Silvertown Tunnel by borough of residence



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q24: ‘Before our conversation today, had you heard about the Silvertown Tunnel?’ Year 1 (n=1096); Year 2 (n=1027)

Figure 14.2 Knowledge about the Silvertown Tunnel by borough of residence



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q24a: ‘How much did you know about the Silvertown Tunnel?’ All who aware of the Silvertown Tunnel; Year 2 (all n=498; Greenwich n=103; Lewisham n=72; Newham n=137; Redbrige n=24; Southwark n=18; Tower Hamlets n=102); **Sample sizes in red are low and should be treated with caution.**

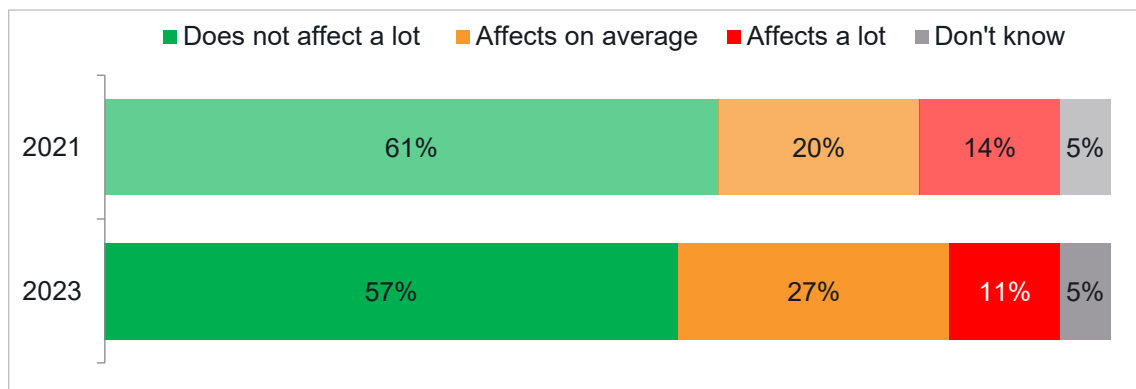
14.7 Awareness generally increases with age, from 22% of under 35s to 63% among over 65-year-olds, with residents aged 55-64 being most likely to know a lot about the Silvertown Tunnel (19%).

- 14.8 Awareness is significantly higher among men (55%) than women (41%); male respondents are also more likely to state that they know a lot about the Tunnel (13% vs 6% of women).
- 14.9 Awareness is also significantly higher among ABC1 respondents compared to C2DE residents (53% vs 42%). Among those who are aware, ABC1s are much more likely to state they know a little about it (63% vs 54% of C2DEs) whereas people from lower social grades are much more likely to know only the name (39% vs 25%).
- 14.10 Residents from Black ethnic groups were much more likely than others to be aware of the Silvertown Tunnel (62% vs 42-48% for each of the other groups). Respondents from White ethnic backgrounds were more likely to state they know a lot about it (13% vs less than 10% for the other ethnicities).
- 14.11 There was no difference in awareness by disability – nearly half of residents with disabilities and non-disabled respondents (48% each) are aware of the Tunnel. However, non-disabled people are more likely to say they know a lot about it (11% vs 6% of residents with disabilities).

Impact of availability of river crossings on people’s ability to make journeys

- 14.12 Figure 14.3 shows how respondents rate the impact of the availability of river crossings for walking, cycling, or using public transport on their ability to make journeys. The rating scale, where 1 means ‘not a lot’ and 6 means ‘a lot’, was grouped into the following nets:
 - Rating 1-2 into ‘does not affect a lot’
 - Rating 3-4 into ‘affects on average’
 - Rating 5-6 into ‘affects a lot’
- 14.13 Over half (57%) of respondents said that the availability of river crossings for walking, cycling or using public transport does not affect their ability to make journeys. Nearly a third (27%) gave an ‘average’ rating, which is a significant increase from 2021. Just over one in ten of respondents stated that the lack of river crossings by public transport, walking or cycling affected the journeys they make ‘a lot’ - a significant drop compared to wave one.

Figure 14.3 Rating the impact of the availability of river crossings on people’s ability to make journeys



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q25: To what extent does lack of river crossings by public transport, walking or cycling affect the journeys you/your household make? Please

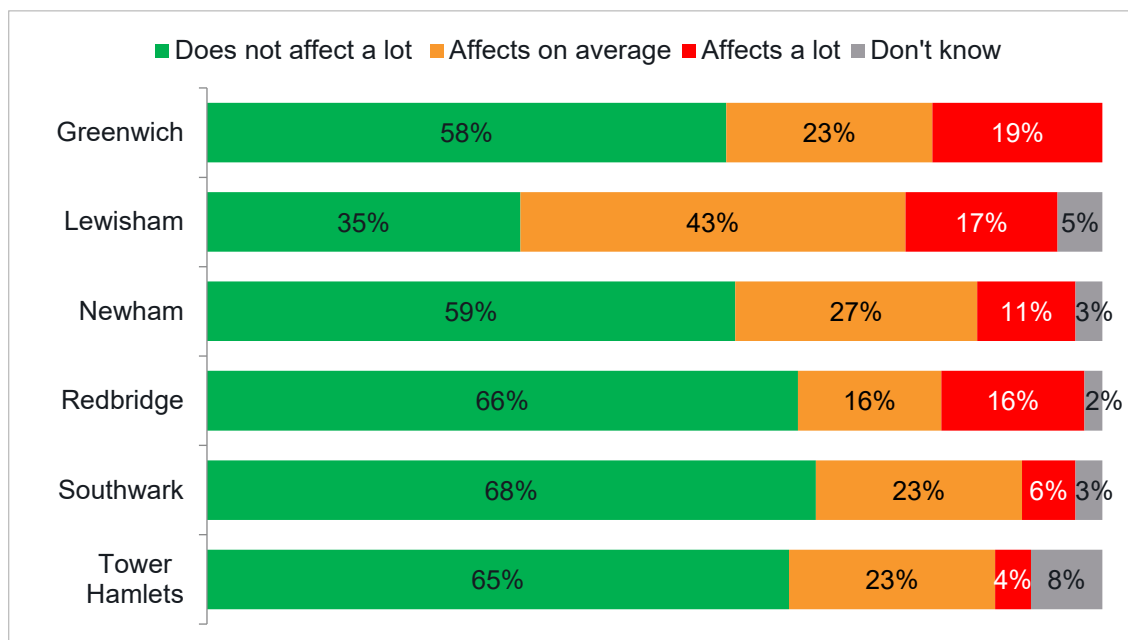
give your answer on a scale of 1 to 6, where 1 means Not a lot and 6 means A lot'; Year 1 (n=1096); Year 2 (n=1027)

14.14 Again, these results should be interpreted in the context of the 'status quo' for travel options and connectivity in this area, and not a measure of 'unmet need', since the tunnel will provide new connectivity and travel options which, over time, will attract trips that reflect and rely on the new connectivity provided.

Differences by local authority

14.15 As seen in Figure 14.4, people in Greenwich were much more likely to say 'a lot' (give a rating of 5 or 6) than respondents in other boroughs (19% compared to average of 11%). Respondents in Lewisham were more likely than others to give it an average rating (43%), whereas in Southwark most residents (68%) thought that lack of river crossings does not affect their travels.

Figure 14.4 Rating the impact of the availability of river crossings on people's ability to make journeys by borough of residence

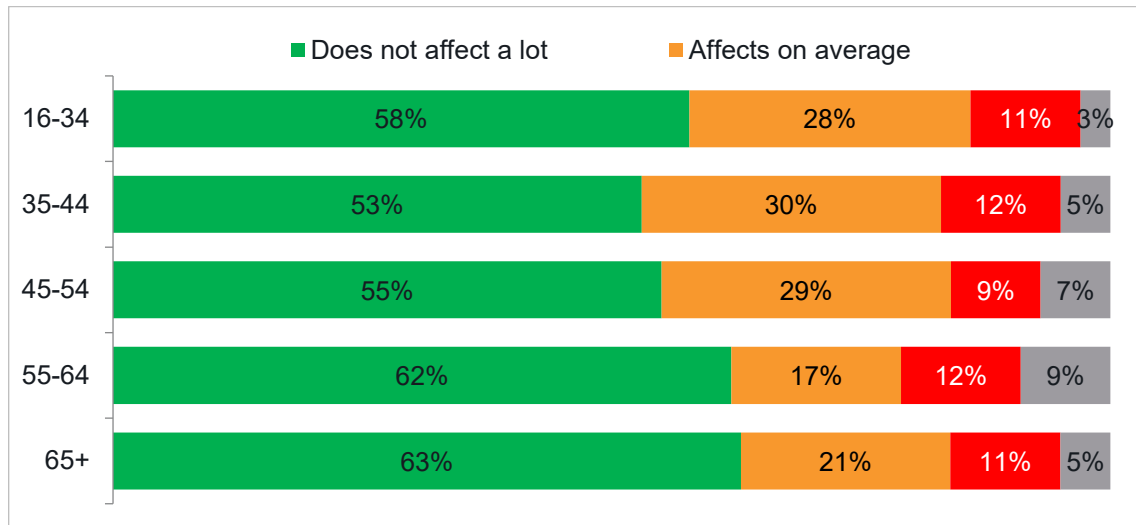


Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q25: 'To what extent does lack of river crossings by public transport, walking or cycling affect the journeys you/your household make? Please give your answer on a scale of 1 to 6, where 1 means Not a lot and 6 means A lot'; Base sizes vary per borough: Greenwich n=131, Lewisham n=139, Newham n=256, Redbridge n=58 Southwark n=145, Tower Hamlets n=221

Differences by age

14.16 Over 55s were more likely than younger people to say the lack of river crossings does not impact them a lot whereas under 55s were more likely to rate the impact as 'average'. Figure 14.5 shows the full profiles for the different age groups.

Figure 14.5 Rating the impact of the availability of river crossings on people’s ability to make journeys by age group



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q25: To what extent does lack of river crossings by public transport, walking or cycling affect the journeys you/your household make? Please give your answer on a scale of 1 to 6, where 1 means Not a lot and 6 means A lot; Base sizes vary per age group; 16-34 n= 426, 35-44 n=221, 45-54 n=160, 55-64 n=129, 65+ n=91

Differences by gender

14.17 There is little difference in ratings by gender. 59% of men think the lack of river crossings by public transport, walking or cycling affects journeys ‘a lot’, while 55% of women give these ratings.

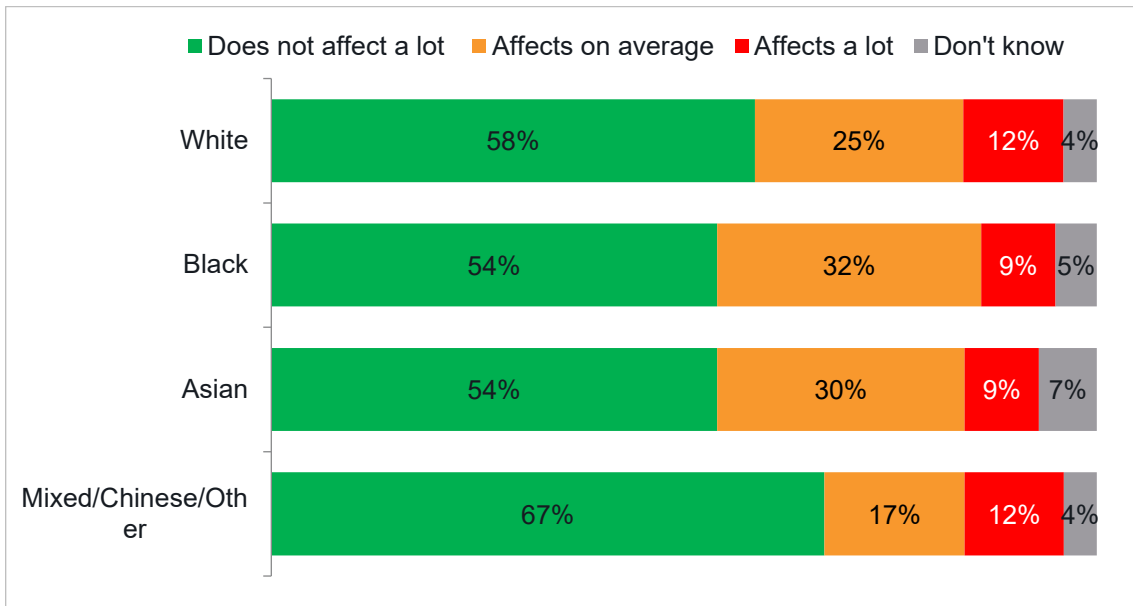
Differences by social grade

14.18 There is little difference by social grade in terms of rating the lack of river crossings as ‘affecting a lot’ and ‘not affecting a lot’. However, ABC1s are significantly more likely to say this impacted them on ‘average’ (30% vs 22% of C2DEs) while C2DE respondents are much more likely to state ‘don’t know’ (8% vs 3% of ABC1s).

Differences by ethnicity

14.19 Respondents from Mixed/ Chinese/ Other ethnic background were much more likely to say that the lack of river crossings ‘does not affect them a lot’ and least likely to rate the impact as ‘average’. The ‘average’ score had the largest share among Asian and Black residents.

Figure 14.6 Rating the impact of the availability of river crossings on people’s ability to make journeys by ethnic groups



Source: TfL, Silvertown Tunnel socio-economic monitoring; resident surveys; Q25: To what extent does lack of river crossings by public transport, walking or cycling affect the journeys you/your household make? Please give your answer on a scale of 1 to 6, where 1 means Not a lot and 6 means A lot'; Base sizes vary per ethnic group; White n=558, Black n=145, Asian n=239, Mixed/ Chinese/Other n=84

Differences by disability

14.20 The proportions rating ‘affect a lot’ were almost the same among disabled and non-disabled residents (12% and 11% respectively). In addition, non-disabled residents were much more likely to say ‘not a lot’ (59% vs 47%), while those with a disability were more likely to say ‘don’t know’ (14% vs 4% respectively).

15 Wave 2: Conclusions

- 15.1 The Silvertown Tunnel is planned for opening in 2025. This report presents the analysis of the second of six planned waves of primary data collection and analysis of secondary data sources to understand the socio-economic impacts of the Silvertown Tunnel. Wave 2 is the second of three baseline waves, planned to occur before the tunnel opens. The next report (due Spring 2024) will bring together and report on the before surveys as a single baseline.
- 15.2 Awareness of the tunnel amongst businesses and residents has increased in wave 2 compared to wave 1 but remains relatively low. More than half of businesses were aware of the Silvertown Tunnel but only a few knew a lot about it and even fewer considered it an important Thames crossing. Amongst residents, awareness of the Silvertown Tunnel is still low (49%) but has increased significantly compared to 2021. Awareness was higher among those who make regular cross-river journeys as well as residents of Greenwich.
- 15.3 Awareness is likely to be impacted by the frequency of river crossings made and modes used for those, as well as the fact that existing business and personal travel patterns will reflect the ‘status quo’ in the area and not the potential provided by a new crossing.
- 15.4 More than a third of residents travel across the Thames at least once a week for any purpose, and commuting has remained the most frequent cross-river trip. From secondary data, commutes tend to be south to north when crossing the river, as the dominant employment centres are all north of the river.
- 15.5 Most companies make business trips that involve crossing the Thames and over a third say their customers/ clients cross the river too. Car remains the most popular transport method for business trips, and public transport does for residents.
- 15.6 Linked to this greater use of car, congestion is a greater issue for businesses than it is for residents.
- 15.7 Congestion alleviation from Silvertown Tunnel could be crucial for businesses, since half of businesses feel that predictability of journey times for road traffic crossing the Thames in the Silvertown/ Blackwall area are poor.
- 15.8 Business floorspace has remained constant in the last ten years but has shifted from industrial to other purposes. At the same time, the population has grown faster than in comparator areas of London. There are significant proportions of population living in areas with high levels of deprivation.

16 Appendices

A Questionnaires

A1 Business survey

SCREENERS

S1a. We have your business as being located in [IMPORT LONDON BOROUGH FROM DATABASE]. Is this correct?

**IMPORT LONDON BOROUGH FROM DATABASE
SINGLECODE**

Yes

No

IF 'No' ASK S1b. IF 'Yes' GO TO S2

S1b. Which London Borough is your business located?

SINGLECODE

Hackney

Tower Hamlets

Newham

Redbridge

Barking & Dagenham

Waltham Forest

Southwark

Lewisham

Greenwich

Somewhere else

IF 'Somewhere else' SELECED AT S1b, THANK & CLOSE. ALL OTHERS GO TO S2

S2. In which sector does your business operate?

SINGLECODE

Primary/ manufacturing

Construction

Transport, retail, distribution

Services – public sector

Services – private sector – Information and communication

Services – private sector – Financial and insurance, and Professional, scientific and technical

Services – private sector – Administrative and support services

Services – private sector – Other

Open response

S3. How many people currently work for the organisation as a whole (across all sites)? PROMPT FOR BEST GUESS

NUMERICAL RESPONSE

Don't know

SINGLECODE

S4. How many people regularly work on this site on an average week day? (include contractors) PROMPT FOR BEST GUESS

NUMERICAL RESPONSE

LABOUR MARKET

Q1a. In the last year, has the number of people working on site changed?

SINGLECODE

Increased

Decreased

No change

Don't know

Prefer not to say

IF 'Increased' OR 'Decreased' ASK Q1b. ALL OTHERS GO TO Q2

Q1b. Approximately by what percentage has it increased/decreased ?

SINGLECODE

More than 50%

Between 26-50%

Between 11-25%

By up to 10%

Don't know

Prefer not to say

Q2. In the last year have you been recruiting staff for this site? READ OUT

SINGLECODE

Yes, currently

Yes, in the last year

No

IF 'Yes, currently' OR 'Yes, in the last year' ASK Q3. IF 'No' GO TO Q6

Q3. How many roles have you tried to fill (both successful & unsuccessful)?

NUMERICAL RESPONSE

Q4. How easy has it been to recruit for positions at this site? On a scale of 1-6 with 1 being not easy & 6 being very easy. READ OUT

SINGLECODE

1-Not easy

- 2
- 3
- 4
- 5
- 6-Very easy
- Don't know

ASK Q5 IF ANSWERED 1, 2 OR 3 AT Q4. OTHERWISE ROUTE TO Q6

Q5. What do you see as the main reason for any difficulty filling positions at this site? DO NOT PROMPT

SINGLECODE

- Difficult to get staff to travel this side of the river
- Poor bus service
- Poor road links
- Poor rail/Underground/DLR links
- Location of business
- Type of work/difficult to get the right skills
- Poor quality working hours
- Antisocial hours
- Applicants seeking part-time work
- Do not advertise enough
- Low salaries
- 'Benefits trap'
- Other (please specify)

OPEN RESPONSE

LOCATION

Q6. What are the main benefits of being located at this site? DO NOT READ OUT

MULTICODE

SITE

- Affordability of premises
- Security of lease
- Anticipated uplift in land values
- Quality/suitability of premises
- Proximity to suppliers
- Proximity to customers/clients
- Proximity to others in the sector
- Size of premises

ACCESSIBILITY

- Ease of access by road
- Ease of access by rail
- Ease of access by active modes

Ease of transport/haulage
Proximity to river crossings

STAFF

Availability of skills
Affordable housing for staff
Accessible to staff

OTHER

Always been here
Other (please specify)

OPEN RESPONSE

Q7. And of those, which is the main benefit of being located at this site?

SINGLECODE

IMPORT OPTIONS SELECTED AT Q6

Q8. What are the main drawbacks of being located at this site? DO NOT READ OUT.

MULTICODE

SITE

Affordability of premises
Security of lease
Anticipated uplift in land values
Quality/suitability of premises
Proximity to suppliers
Proximity to customers/clients
Proximity to others in the sector
Size of premises
Crime

ACCESSIBILITY

Difficulty of access by road
Difficulty of access by rail
Difficulty of access by cycle or on foot
Difficulty of transport/haulage
Lack of river crossings
Congestion
Remote from markets

STAFF

Difficulty recruiting
Difficult to attract staff because of location
Difficult to retain staff because of location
Lack of affordable housing

OTHER

Always been here
Other (please specify)

OPEN RESPONSE

Q9. As a percentage, what proportion of visitors/customers do you estimate travel to these premises by? READ OUT

MULTICODE

TOTAL TO ADD UP TO 100%

Car

NUMERICAL RESPONSE

Van

NUMERICAL RESPONSE

Bus

NUMERICAL RESPONSE

Walk

NUMERICAL RESPONSE

Cycle

NUMERICAL RESPONSE

Other – please specify

NUMERICAL RESPONSE

No visitors

SINGLECODE

Don't know

SINGLECODE

ASK IF TRAVEL BY CAR, VAN OR BUS (Q9= CAR, VAN OR BUS > 0%) OTHERWISE GO TO Q11

Q10. As a percentage, approximately what proportion of visitors/customers who travel by car, van or bus travel from across the river in east/southeast London to get to this site?

NUMERICAL RESPONSE AS PERCENTAGE

Don't know

SINGLECODE

Q11. As a percentage, what proportion of staff business trips from this site do you estimate are made by ...? READ OUT

MULTICODE

TOTAL TO ADD UP TO 100%

Car

NUMERICAL RESPONSE

Van

NUMERICAL RESPONSE

Bus

NUMERICAL RESPONSE

Walk

NUMERICAL RESPONSE

Cycle

NUMERICAL RESPONSE

Other – please specify

NUMERICAL RESPONSE

Not making in-person business trips

SINGLECODE

Don't know

SINGLECODE

FUTURE PLANS

Q12. Do you expect your business to move from this site in the next year?

SINGLECODE

Yes

No

Don't know

ASK Q13 IF 'Yes' AT Q12. OTHERS GO TO Q16

Q13. Why do you expect to move?

MULTICODE

Larger premises

Smaller premises

More modern premises

To be in a more accessible location

To be closer to customers

To be closer to suppliers

To be closer to staff catchment area

Existing premises being redeveloped

Other (please specify)

OPEN RESPONSE

Q14. If you expect to relocate, do you expect you will find suitable premises within south/east London?

SINGLECODE

Yes

No

Don't know

Q15. Why do you say that?

OPEN RESPONSE

DELIVERIES & SUPPLY CHAIN

Q16. How many deliveries do you receive at this site each week? (frequency)

NUMERICAL RESPONSE

Q17. Where are your main suppliers located?

Within east or southeast London

Within Greater London

Southeast England

East of England

Midlands

Elsewhere in UK
Continental Europe
Other
Open response

Q18. What, if any, problems do you experience with deliveries to this site?

DO NOT READ OUT

MULTICODE

SITE RELATED

Parking

Volume of goods

Localised access issues at the site

Location of clients or customers

TRAFFIC RELATED

Congestion locally

Congestion more widely

Delays on road network due to incidents

Crossing the River Thames

Poor traffic management (e.g. traffic lights)

Scheduling deliveries to avoid peak hours (congestion)

COST RELATED

Cost of haulage

Central London congestion charge

Ultra Low Emission Zone charge

Other road charges e.g. Dartford

VEHICLE RELATED

Weight limits/restrictions

Height limits/restrictions

BUSINESS RELATED

Export or import factors

Proximity to suppliers

Reliability of suppliers

Reliability of hauliers

STAFF RELATED

Availability of labour

Other labour factors (quality, reliability)

OTHER

Other (please specify)

OPEN RESPONSE

Do not experience problems with delivery

SINGLECODE

Q19. How many goods-out/deliveries leave your site each week?

(frequency)

NUMERICAL RESPONSE

Don't know

SINGLECODE

CUSTOMER & BUSINESS TRAVEL

Q20. How important are the following to your business at this site?

Please give your answer on a scale of 1-3 where 1 is not important, 2 is slightly important & 3 is very important. READ OUT

1-Not important

2-Slightly important

3-Very important

4-Don't know

LOOP

Ease of access by customers/clients

Ease of access to markets for goods-out or business travel

Q21. Where are your main customers/clients located?

Within east or southeast London

Within Greater London

Southeast England

East of England

Midlands

Elsewhere in UK

Continental Europe

Other

Open response

Q22. Approximately how many customers/clients visit your site each week?

NUMERICAL RESPONSE

Don't know

SINGLECODE

Q23. Approximately how many business trips depart from your site each week? (Where business trip is a journey made by a member of staff during working hours)

NUMERICAL RESPONSE

Don't know

SINGLECODE

Q24. As a percentage, what proportion of business trips require crossing the Thames in east/southeast London?

NUMERICAL RESPONSE AS PERCENTAGE

Don't know

SINGLECODE

PERCEPTIONS & RIVER CROSSINGS

Q25. How important do you consider each of the following Thames crossings for your business (including staff commutes, customer/client access and business travel)?

Please use a scale of 1-6 where 1 is not important and 6 is very important.

READ OUT

1-Not important

2

3

4

5

6-Very important

Don't know

LOOP

Tower Bridge

Rotherhithe Tunnel

Blackwall Tunnel

Woolwich Ferry

Dartford Crossing

The future Silvertown Tunnel

Q26. Which of the following is the most important for travel to your site?

SINGLECODE

Tower Bridge

Rotherhithe Tunnel

Blackwall Tunnel

Woolwich Ferry

Dartford Crossing

The future Silvertown Tunnel

Q27. To what extent does the current number or capacity of river crossings constrain operations or viability of business on your site?

READ OUT

SINGLECODE

1-Not at all

2-A little

3-Quite a lot

4-A lot

Don't know

Q28. Taking into account any predictable delay from everyday congestion. How predictable do you think journey times currently are for road traffic crossing the River Thames in the Silvertown/Blackwall Tunnel area? READ OUT

SINGLECODE

Very poor (unpredictable)

Poor
Average
Good
Very good (predictable)
Don't know

SILVERTOWN TUNNEL

Silvertown Tunnel is a new river crossing between east/southeast London, due to open in 2025, situated east of the Blackwall Tunnel. The tunnel will connect the Greenwich Peninsular and Silvertown. The crossing will provide new road connectivity and will increase the number of cross-river bus routes. Use of the tunnel will be tolled, and a toll will be applied to the Blackwall Tunnel.

Q29A. Before our conversation today, had you heard about the Silvertown Tunnel?

SINGLECODE

Yes
No
Not sure

ASK Q29B if '1' at Q29A. OTHERS GOTO Q29

Q29B. How much did you know about the Silvertown Tunnel?

SINGLECODE

I only knew the name
I knew a little about it
I knew a lot about it

[To be coded during data processing: 1-3= aware; 2-3= familiar; 3= knowledgeable]

Q29. Thinking specifically about the potential impact of the Silvertown Tunnel on your business, how strongly do you agree or disagree with the following statements?

Please give your answer on a scale of 1-6, where 1 is strongly disagree and 6 is strongly agree. READ OUT

1-Strongly disagree
2
3
4
5
6-Strongly agree
Don't know

LOOP

The current crossing options are adequate and there is no need to further increase journey opportunities
Unpredictable journey times for crossing the river are a significant cause of operational difficulties at present
New bus routes through the tunnel will make it easier for staff to travel to work

My business is not greatly influenced by cross-river traffic so it would have little impact

We are happy to pay a toll in line with the Dartford Crossing, if journey times are more reliable

The charges should have smartcard payment options to reduce delays for freight

We would look to alternative routes to avoid the crossing charges, even if it means longer journeys and greater distance travelled

FURTHER RESEARCH

Q30. We may wish to carry out some research in future with businesses that have taken part in this survey to discuss some of the issues covered in more detail. Would you be willing to be contacted to take part in future research?

You will only be contacted to be invited to take part in further research and for no other reason.

SINGLECODE

Yes

No

Q31. Please may I collect some contact details?

IMPORT AVAILABLE INFORMATION FROM DATABASE

Full name

OPEN RESPONSE

Business name

OPEN RESPONSE

Contact number

OPEN RESPONSE

Email address

OPEN RESPONSE

DO NOT FORCE RESPONSE FOR EMAIL

A2 Residential survey

SCREENERS

QX. INTERVIEWER – CODE THE LOCAL AUTHORITY THAT THE SHIFT YOU ARE WORKING IS IN.

SINGLECODE

Barking & Dagenham
Greenwich
Hackney
Lewisham
Redbridge
Southwark
Tower Hamlets
Waltham Forest

ICT – USE THE ABOVE TO FILTER THE FULL POSTCODE LIST SO THE S1 POSTCODE CHECKER ONLY CONFIRMS AGAINST ELIGIBLE POSTCODES FROM THE ABOVE LA. ALL OTHER POSTCODES WOULD BE A THANK & CLOSE

ASK ALL

S1. What is your full postcode?

INTERVIEWER (IF REQUIRED): We only need to know this ensure we speak to people who live in the study area and it won't be used to identify you.

POSTCODE – CHECK AGAINST LIST, IF NOT IN AREA THANK & CLOSE

S2. What is your age?

Numeric response

Prefer not to say

ASK S3 IF 'Prefer not to say' AT S2, OTHERS GOTO S4

S3. Which of the following age groups do you belong to? READ OUT

SINGLECODE

16-24

25-34

35-44

45-54

55-64

65-74

75+

Prefer not to say

CHECK QUOTAS

ASK ALL

S4. What gender do you identify with? DO NOT READ OUT

SINGLECODE

Male

Female

Other (Write in)

Prefer not to say

CHECK QUOTAS

ASK ALL

SHOWCARD S5

S5. Thinking of the chief income earner in your household (which might be you or somebody else in the household) which of these best describes the current status of the chief income earner? READ OUT - PROBE

SINGLECODE

Homemaker/housewife/househusband

Student/Full time education

Retired

Unemployed/on benefit

Factory/manual worker

Crafts/tradesperson/skilled worker

Office/clerical/administration

Middle management

Senior management

Professional

Don't know/prefer not to say

CHECK QUOTAS - CODES 1-5 C2DE, CODES 6-10 ABC1

SECTION 1 - TRAVEL

ASK ALL

SHOWCARD Q1

Q1. In an average week, how often do you travel for the purpose of the following? READ OUT

SINGLECODE

Every day

3-4 days per week

2 days per week

1 day per week

A few days per month

Less than one day per month

Not applicable

Don't know

LOOP – DO NOT RANDOMISE

Travel to work (commuting)

Travel for work (business travel)

Travel to education

Travel for shopping and personal business

Leisure

Other reasons

END LOOP

SECTION 2 – VIEWS ON RIVER CROSSINGS

SHOWCARD Q1 (AGAIN)

Q2. How often do you travel across the River Thames in east/southeast London for the following purposes? READ OUT

SINGLECODE

- Every day
- 3-4 days per week
- 2 days per week
- 1 day per week
- A few days per month
- Less than one day per month
- Not applicable
- Don't know

LOOP – DO NOT RANDOMISE

- Travel to work (commuting)
- Travel for work (business travel)
- Travel to education
- Travel for shopping and personal business
- Leisure
- Other reasons

END LOOP

Validation check: frequency of travelling at Q1 must be the same or higher than the frequency stated at Q2 for the same purpose. For instance, cannot select “1 day per week” at Q1 and “3-4 days a week” at Q2 and for the same purpose.

Ensure the answers are not contradictory, for instance, “not applicable” at Q1 cannot be selected in combination with “a few days per month” at Q2 for the same purpose.

IF ‘A few days per month’ OR ‘Less than one day per month’ OR ‘Not applicable’ FOR ALL LOOP ELEMENTS AT Q2 THEN SKIP TO Q21

THERE IS NO Q3

ASK Q4 IF ANSWER AT Q2 ‘Travel to work (commuting)’ IS EITHER ‘1 day per week’, ‘2 days per week’, ‘3-4 days per week’, or ‘every day’.

Q4. You said you travel across the River Thames in east/southeast London for travel to work (commuting), how do you usually travel.

INTERVIEWER (IF REQUIRED): If you use different methods of transport during the same journey (such as walking to catch a bus) then please just think about the one you use to travel the furthest distance?

SINGLECODE

- Car as driver
- Car as passenger
- Bus
- National rail
- Underground/DLR
- Cycle
- Walk
- Don't know

ASK Q5 if answer at Q2 'Travel for work (business travel) is either '1 day per week', '2 days per week', '3-4 days per week', or 'every day'.

**Q5. You said you travel across the River Thames in east/southeast London for travel for work (business travel), how do you usually travel?
INTERVIEWER (IF REQUIRED): If you use different methods of transport during the same journey (such as walking to catch a bus) then please just think about the one you use to travel the furthest distance?**

SINGLECODE

Car as driver
Car as passenger
Bus
National rail
Underground/DLR
Cycle
Walk
Don't know

ASK Q6 if answer at Q2 'Travel for education' is either '1 day per week', '2 days per week', '3-4 days per week', or 'every day'.

**Q6. You said you travel across the River Thames in east/southeast London for travel to education, how do you usually travel?
INTERVIEWER (IF REQUIRED): If you use different methods of transport during the same journey (such as walking to catch a bus) then please just think about the one you use to travel the furthest distance?**

SINGLECODE

Car as driver
Car as passenger
Bus
National rail
Underground/DLR
Cycle
Walk
Don't know

ASK Q7 if answer at Q2 'Travel for shopping and personal business' is either '1 day per week', '2 days per week', '3-4 days per week', or 'every day'.

**Q7. You said you travel across the River Thames in east/southeast London for travel for shopping and personal business, how do you usually travel?
INTERVIEWER (IF REQUIRED): If you use different methods of transport during the same journey (such as walking to catch a bus) then please just think about the one you use to travel the furthest distance?**

SINGLECODE

Car as driver
Car as passenger
Bus
National rail
Underground/DLR
Cycle
Walk

Don't know

ASK Q8a if answer at Q2 'Leisure reasons' is either '1 day per week', '2 days per week', '3-4 days per week', or 'every day'.

Q8a. You said you travel across the River Thames in east/southeast London for leisure, how do you usually travel?

INTERVIEWER (IF REQUIRED): If you use different methods of transport during the same journey (such as walking to catch a bus) then please just think about the one you use to travel the furthest distance?

SINGLECODE

Car as driver

Car as passenger

Bus

National rail

Underground/DLR

Cycle

Walk

Don't know

ASK Q8b if answer at Q2 'Other reasons' is either '1 day per week', '2 days per week', '3-4 days per week', or 'every day'.

Q8b. You said you travel across the River Thames in east/southeast London for other reasons, how do you usually travel?

INTERVIEWER (IF REQUIRED): If you use different methods of transport during the same journey (such as walking to catch a bus) then please just think about the one you use to travel the furthest distance?

SINGLECODE

Car as driver

Car as passenger

Bus

National rail

Underground/DLR

Cycle

Walk

Don't know

ASK Q9 if answer at ANY OF Q2 is either '1 day per week', '2 days per week', '3-4 days per week', or 'every day'.

Q9. For the cross-river journey you make most often, have you changed the MAIN mode of transport you use for this journey in the last year?

SINGLECODE

Yes

No

Don't know

ASK Q10-Q11 IF 'Yes' AT Q9, OTHERS GOTO Q12

Q10. What mode of transport have you changed from and to? READ OUT

SINGLECODE

Car as driver

Car as passenger
Bus
National rail
Underground/DLR
Cycle
Walk
Don't know

LOOP – DO NOT RANDOMISE

Changed from

Changed to

END LOOP

Q11. And what was the reason you made this change of mode? DO NOT READ OUT - TICK ALL THAT APPLY

MULTICODE

Public transport costs are too expensive for me
Car costs are too expensive for me
Congestion on the car journey means journey takes too long
Congestion on the car route means the journey time is unreliable
Congestion on the bus route means journey takes too long
Congestion on the bus route means the journey time is unreliable
Moved house
Changed job/shift time/work location
New public transport service became available
Gained access to a car/van
Started/stopped undertaking childcare or caring duties
Avoiding the central London congestion charge
Other (please specify)
Don't know

ASK Q12 if answer at ANY OF Q2 is either '1 day per week', '2 days per week', '3-4 days per week', or 'every day'.

Q12. For the cross-river journey you make most often, have you changed the MAIN river crossing you usually use in the last year?

SINGLECODE

Yes
No
Don't know

ASK Q13-Q14 if 'Yes' at Q12.

Q13. Which crossing have you changed from and to?

SINGLECODE

Tower Bridge
Rotherhithe Tunnel
Blackwall Tunnel
Woolwich Ferry
Dartford Crossing
Other (Write in)

LOOP – DO NOT RANDOMISE

Changed from
Changed to
END LOOP

Q14. And what is the reason for changing the river crossing that you use most often? DO NOT READ OUT - TICK ALL THAT APPLY

MULTICODE

Congestion on the car journey means journey takes too long
Congestion on the car journey means the journey time is unreliable/unpredictable
Congestion on the bus route means journey takes too long
Congestion on the bus route means the journey time is unreliable
Moved house
Changed job/shift time/work location
New public transport service became available
Gained access to a car/van
Started/stopped undertaking childcare or caring duties
Avoiding the central London congestion charge
Other (please specify)
Don't know

ASK Q15 IF 'Car as driver' OR 'Car as passenger' AT Q4, Q5, Q6, Q7 Q8a OR Q8b

Q15. You said you travel across the River Thames by car as a driver or as a passenger, at what time do you usually cross the river, outbound? By this, I mean your journey from your home.

INTERVIEWER (IF REQUIRED): Think about the journey you make most frequently.

SINGLECODE

Before 5am
5-7am
7-8am
8-9am
9-10am
10am-4pm
4-5pm
5-6pm
6-7pm
7-9pm
After 9pm
Don't know

ASK Q16 if 'Bus' 'National rail' or 'Underground/DLR' at Q4, Q5, Q6, Q7 Q8a OR Q8b

Q16. You said you travel across the River Thames by public transport, at what time do you usually cross the river, outbound? By this, I mean your journey from your home.

INTERVIEWER (IF REQUIRED): Think about the journey you make most frequently.

SINGLECODE

Before 5am

5-7am

7-8am

8-9am

9-10am

10am-4pm

4-5pm

5-6pm

6-7pm

7-9pm

After 9pm

Don't know

ASK Q17 if 'Car as driver' OR 'Car as passenger' at Q4, Q5, Q6, Q7 Q8a OR Q8b

Q17. You said you travel across the River Thames by car as a driver or as a passenger, at what time do you usually cross the river to return home again?

INTERVIEWER (IF REQUIRED): Think about the journey you make most frequently.

SINGLECODE

Before 5am

5-7am

7-8am

8-9am

9-10am

10am-4pm

4-5pm

5-6pm

6-7pm

7-9pm

After 9pm

Don't know

ASK Q18 if 'Bus' 'National rail' or 'Underground/DLR' at Q4, Q5, Q6, Q7 Q8a OR Q8b

Q18. You said you travel across the River Thames by public transport, at what time do you usually cross the river to return home again?

INTERVIEWER (IF REQUIRED): Think about the journey you make most frequently.

SINGLECODE

Before 5am

5-7am

7-8am

8-9am

9-10am

10am-4pm
4-5pm
5-6pm
6-7pm
7-9pm
After 9pm
Don't know

ASK Q19a if answer at ANY OF Q2 is either '1 day per week', '2 days per week', '3-4 days per week', or 'every day'. OTHERS GOTO Q21

Q19a. Earlier you said that you cross the River Thames in east/southeast London for the following purposes. Which one do you do most often? READ OUT

SINGLECODE

SHOW ALL MENTIONED AT Q2 AS '1 day per week', '2 days per week', '3-4 days per week', or 'every day'.

Travel to work (commuting)
Travel for work (business travel)
Travel to education
Travel for shopping and personal business
Leisure
Other reasons

Q19b. Now, thinking about the journey you make most often across the River Thames in east/southeast London, over the last year have you changed the time of day you usually make this journey across the river?

SINGLECODE

Yes – earlier
Yes – later
No
Don't know

ASK Q20 if 'Yes – earlier' or 'Yes – later' at Q19b

Q20. What's the main reason you changed the time of day you usually make your journey? PROBE – TICK ONE ONLY

SINGLECODE

Changed job
Moved house
My work requires me to travel earlier/later
Prefer to travel when the roads are less busy
Prefer to travel when public transport is less busy
Avoiding the central London congestion charge
Childcare or caring commitments require me travel earlier/later
Acquired a car/van
New public transport service became available
Other (please specify)
Don't know

IF ANSWER 'A few days per month' OR 'Less than one day per month' OR 'Not applicable' FOR ALL AT Q2 THEN ASK Q21

Q21. Why don't you cross the river/cross more often?

MULTICODE

I don't need to reach destinations in east/southeast London
The journey is not served directly by bus
The journey is not served directly by rail/Underground/DLR
There is too much congestion on the route across the river
The Blackwall Tunnel is too unreliable
Other (please specify)
Don't know

ASK ALL

Q22. Overall, how easy is it for you to get across the River Thames in east/southeast London? Please give your answer on a scale of 1 to 6, where 1 means it's not easy and 6 means it's very easy.

INTERVIEWER (IF REQUIRED): Even if you don't ever cross the river, we'd still like to hear how easy you think it would be to do so.

SINGLECODE

1 – Not easy
2
3
4
5
6 – Very easy
Don't know

ASK Q23 if '1' or '2' at Q22. OTHERS GOTO Q24

Q23. You said it's not very easy for you to get across the River Thames in east/southeast London, why is that? PROBE - TICK ALL THAT APPLY

MULTICODE

There is not a convenient crossing point nearby
It takes too long to reach the nearest crossing
Traffic congestion on the approach to the crossing
Buses do not serve the route I want to take
Train/Underground/DLR does not serve the route I want to take
Other (please specify)
Don't know

ASK ALL

Silvertown Tunnel is a new road crossing beneath the River Thames in east London. The tunnel is due to open in 2025. The tunnel will connect the Greenwich Peninsular and Silvertown. Silvertown Tunnel will provide a new road link and will increase the number of cross-river bus routes. Drivers will be charged to use the tunnel and a charge will also be applied to the Blackwall Tunnel.

Q24. Before our conversation today, had you heard about the Silvertown Tunnel?

SINGLECODE

Yes
No
Not sure

ASK Q24A if '1' at Q24. OTHERS GOTO Q25

Q24A. How much did you know about the Silvertown Tunnel?

SINGLECODE

I only knew the name
I knew a little about it
I knew a lot about it

[To be coded during data processing: 1-3= aware; 2-3= familiar; 3= knowledgeable]

ASK ALL

Q25. To what extent does lack of river crossings by public transport, walking or cycling affect the journeys you/your household make? Please give your answer on a scale of 1 to 6, where 1 means Not a lot and 6 means A lot.

SINGLECODE

1 – Not a lot
2
3
4
5
6 – A lot
Don't know

THERE IS NO Q26 IN THE PRE-OPENING SURVEY

ASK ALL

SECTION 3 - EMPLOYMENT

I'd now like to ask you some questions about you and your household so we can understand the types of people who've taken part in this survey.

D1. Which option best describes your own working status? READ OUT

SINGLECODE

Working full time (more than 30 hours per week)
Working part time (less than 30 hours per week)
Studying (full or part time)
Looking after family and home
Other not working (e.g., retired, looking for work)
Prefer not to say

D2. What is your annual household income? READ OUT

SINGLECODE

Under £10,000

£10,000 to £19,999
£20,000 to £39,999
£40,000 to £74,999
Over £75,000
Prefer not to say
Don't know

D3. What is your ethnicity? READ OUT

SINGLECODE

White
Black
Chinese
Asian
Mixed
Other
Prefer not to say

D4a. Do you have a long-term physical or mental disability or health issue that limits your daily activities, the work you can do or your ability to travel and get about?

SINGLECODE

Yes
No
Prefer not to say

ASK D4b if 'Yes' at D4a, others go to D5.

D4b. Which of these best describes the health issue or disability which limits your ability to travel and get about the most? READ OUT

MULTICODE

My health issue or disability does not affect my ability to travel or get about
Mobility impairment
Visual impairment
Hearing impairment
Learning disability
Mental health condition
Serious long-term illness
Other (please state)
Prefer not to say

ASK ALL

D5. Does your household own or rent your home? READ OUT - PROBE

SINGLECODE

Owns outright
Owns with a mortgage
Rents
Part-owns part-rents (shared ownership)
Lives rent free
Other
Prefer not to say

D6. Do you have access to a car/van for personal use?

SINGLECODE

Yes

No

Prefer not to say

D7. Do you have access to a cycle?

SINGLECODE

Yes

No

Prefer not to say

I just need to ask you a few more questions about the chief income earner in your household (which might be you or somebody else in the household).

INTERVIEWER IF REQUIRED: Include income from employment, pensions, state benefits, investments or any other source.

D8. What (TEXT SUB BASED ON RESPONSE TO S5 IF RETIRED/WORKING: is/was) the Chief Income Earner's main job?

CODES OPEN

Don't know

D9. What (TEXT SUB BASED ON RESPONSE TO S5 IF RETIRED/WORKING: does/did) the Chief Income Earner mainly do in their job?

PROBE FOR QUALIFICATIONS AND TRAINING NEEDED TO DO THE JOB

CODES OPEN

Don't know

D10. What (TEXT SUB BASED ON RESPONSE TO S5 IF RETIRED/WORKING: does/did) the firm or organisation the Chief Income Earner (TEXT SUB works/worked) for mainly make or do?

PROBE FOR FULL DESCRIPTION SUCH AS 'Manufacturing', 'Retail' ETC.

CODES OPEN

Don't know

D11. (TEXT SUB BASED ON RESPONSE TO S5 IF RETIRED/WORKING: Is/Was) the Chief Income Earner an employee or self-employed?

SINGLECODE

Employee

Self-employed

Don't know

D12. In their job (TEXT SUB BASED ON RESPONSE TO S5 IF RETIRED/WORKING: does/did) **the Chief Income Earner have any formal responsibility for supervising the work of other employees?**

INTERVIEWER IF REQUIRED: Do not include supervisors of children, (e.g. teachers, nannies, childminders; supervisors of animals); or people who supervise security or buildings only (e.g. caretakers, security guards).

SINGLECODE

Yes

No

Don't know

D13. How many people (TEXT SUB BASED ON RESPONSE TO S5 IF RETIRED/WORKING: work/worked) **at the place where the Chief Income Earner** (TEXT SUB: works/worked)?

INTERVIEWER (IF REQUIRED): We're only interested in employees in the place that you mainly work(ed), not the whole organisation if it has a number of locations.

SINGLECODE

1 to 24

25 to 499

500 or more

Don't know

SECTION 5 – FURTHER RESEARCH

FR1. As part of this research we, Qa Research, may wish to carry out some further interviews with people who have completed this survey to ask them for a bit more detail about the answers they have given. Would you be happy to be re-contacted by us for this reason?

SINGLECODE

Yes (if yes, take name and contact details)

No

FR2. Please may I collect some contact details?

Full name

OPEN RESPONSE

Contact number

OPEN RESPONSE

Email address

OPEN RESPONSE

DO NOT FORCE RESPONSE FOR EMAIL

B Figure and table reference

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