

8TH APRIL 2016

The Economic Case for Cycling

Enfield Cycling Conference

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Transport for London



EVERY JOURNEY MATTERS

Introduction and context



Introduction

Transport for London

- Implements the Mayor's Transport Strategy
- Manages those services across the Capital for which the Mayor is responsible:
 - (i) Surface Transport, (ii) Rail & Underground, (iii) Crossrail (with DfT)

TfL Cycling Strategy Team (Surface Strategy and Planning)

- Provides TfL's overview of the Mayor's £913m Cycling Vision Portfolio
- Works directly with TfL's Cycling Delivery Teams – e.g. *Borough Projects and Programmes (for Mini-Hollands and Quietways)* and *Road Space Management (for Cycle Superhighways and Better Junctions)* and the GLA
- Leads the pan-London *Economic Case for Cycling working group*:
 - Comprising lead officers from TfL, Boroughs, Businesses, DfT, LCC
 - Develops evidence to understand the economic impacts of cycling
 - Inform policy decisions with robust transport planning evidence



Contents

- Introduction
- Context – the growth challenge for London
- The Mayor's Cycling Vision & progress to date
- Cycling and the Economy
- Cycling in Enfield & Outer London
- Economic opportunities
- This afternoon's workshop...



A wider economic context:
accommodating
London's growth
whilst improving
'place'



London is growing by...

6 new residents
every hour



That's a car load
every 40 minutes



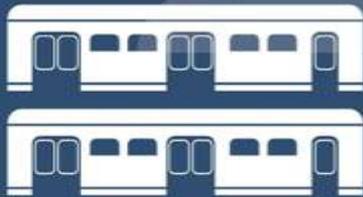
or

2 Buses
every day



or

2 Tube trains
every week



Today the population is

8,600,000

and by 2030, it will be

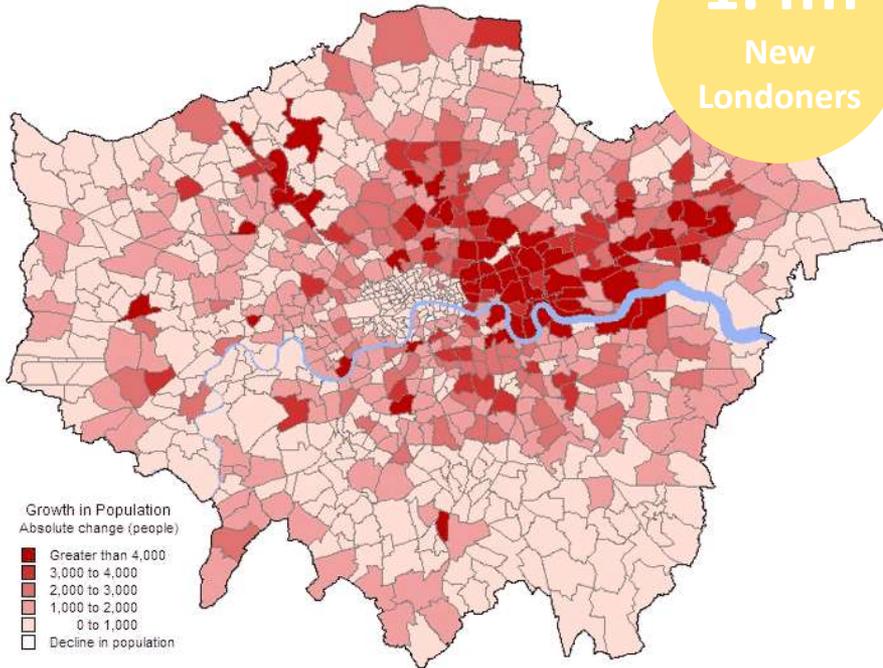
10,000,000



Ensuring population growth is productive growth

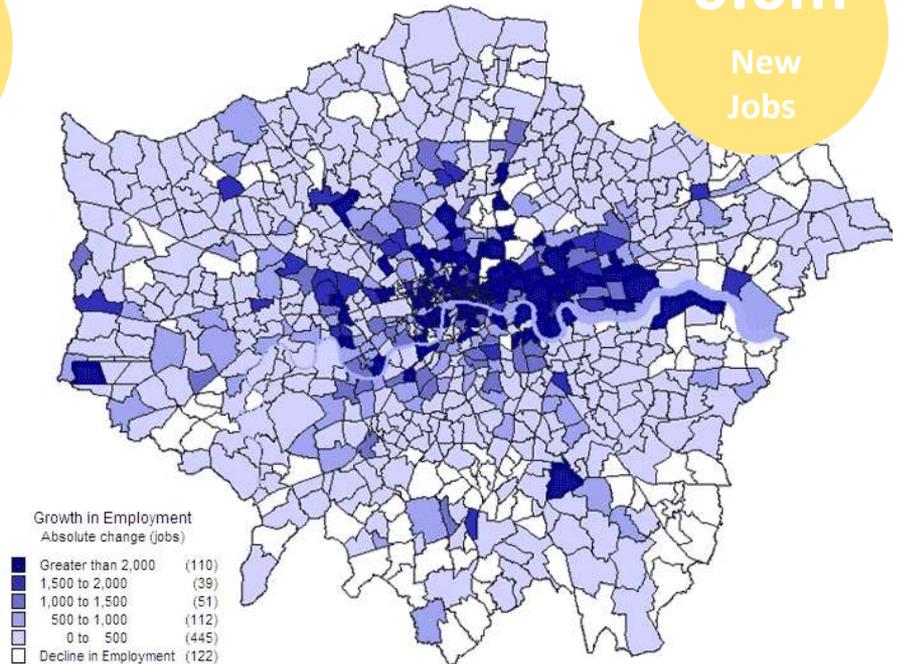
POPULATION (Growth to 2030)

1.4m
New
Londoners

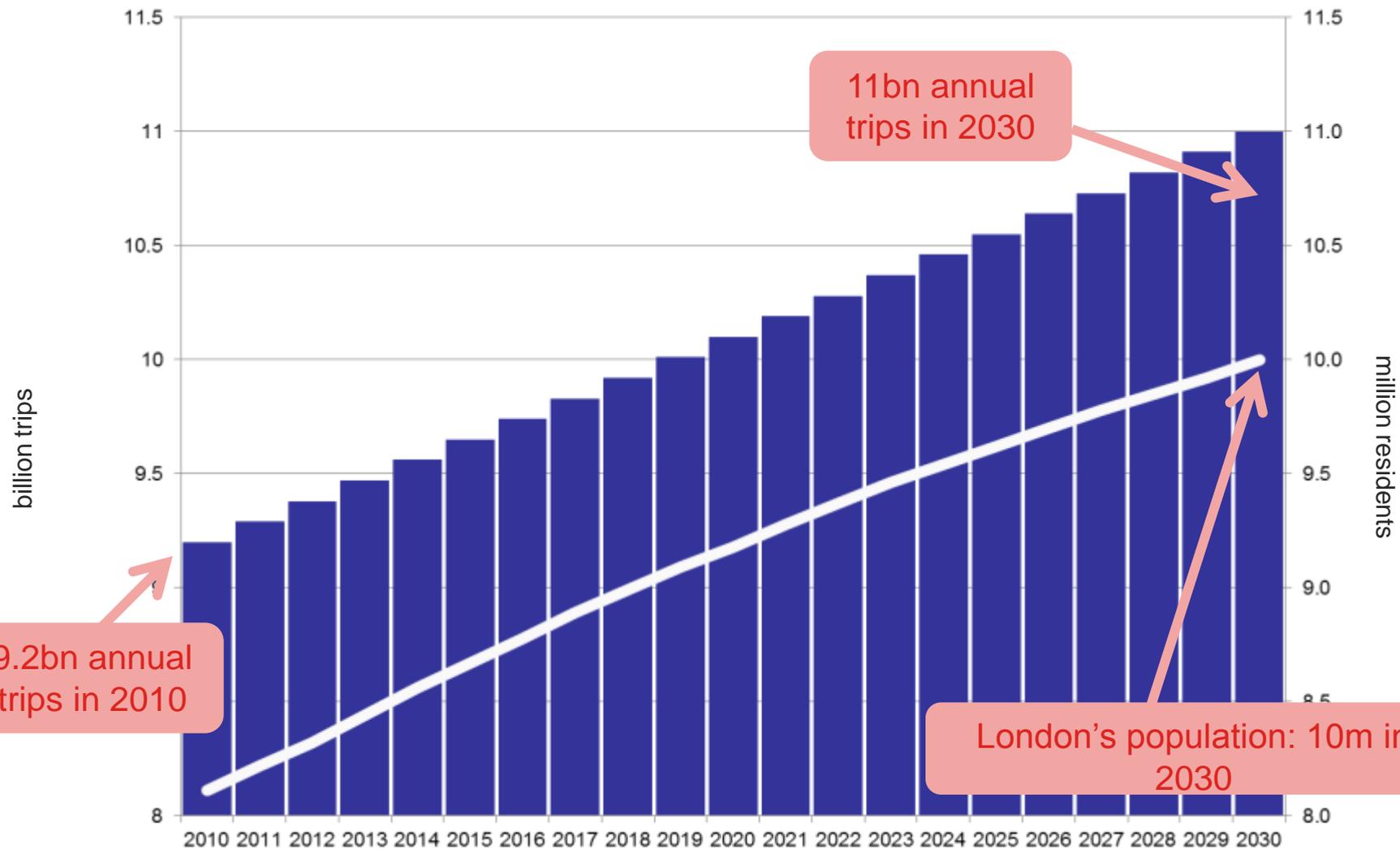


EMPLOYMENT (Growth to 2030)

0.6m
New
Jobs



Billions more trips on public transport and roads



Economic challenges for London's transport

“London could incur £9.3 billion from traffic congestion by 2030, an increase of 71 percent from today, costing each car commuting household more than £4,000 a year.”

*INRIX and the Centre
for Economics and
Business Research*

“London's success is based on its competitive strengths... these factors include access to qualified staff, access to markets and a competitive business environment that encourages innovation. People are attracted to London by the variety of career opportunities, the diversity and openness to different cultures, as well as the **vast array of leisure and cultural activities...London relies on high quality labour viewing it as an attractive place in which to live and work...**”

*Mayor's Transport Strategy Evidence
Base*



Addressing future growth

TfL Roads Modernisation Plan

1. Ensure our road assets are fit for the future

2. Deliver a programme of major highways improvements to:

- Unlock economic growth and regeneration
- Optimise road space for all road users
- Improve pedestrian, cycling and bus facilities
- Enhance urban real and the 'place' function of streets
- Improve safety



3. Deliver the Mayor's vision for cycling

4. Secure a further 40% reduction in fatalities and serious injuries on London's roads

5. Keep London moving



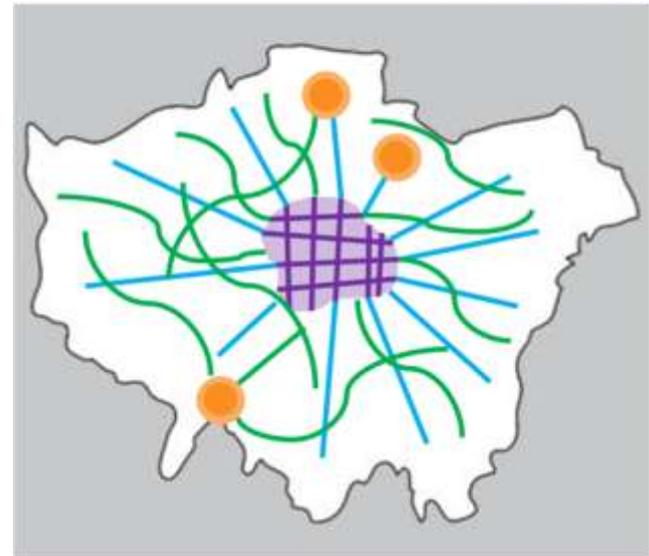
The Mayor's Cycling Vision: Progress to date



The Mayor's Vision for Cycling

An Introduction

- Published in March 2013, programmes in their current form were signed off by TfL Board in Feb 2014 (with Mini-Holland boroughs announced in March 2014)
- Investment of £913m to deliver a step-change in cycling provision and encourage growth in cycling across all of London
- Target to grow cycling in London to achieve 1.5m cycling journeys per day by 2026 (currently c.645k/day)
- The four elements of the Vision are:
 - [A Tube Network for the Bike](#) – Providing a network of cycle routes across London
 - [Safer Streets for the Bike](#) – A range of measures to improve cycle safety at junctions and to improve HGV safety
 - [More People Travelling by Bike](#) – Making cycling a mainstream and popular mode of transport
 - [Better Places for Everyone](#) – More cycling will benefit everyone, not just cyclists



The Mayor's Vision for Cycling

What has been achieved so far

- Cycle Superhighways (CSs) – CS5 Inner opened Nov 2015. CS1, CS2 upgrade, CS E-W and CS N-S to be completed by Summer 2016
- Mini-Hollands and Quietways – substantial progress on Mini-Holland programmes and delivery of pilot Quietways expected by end of 2016
- Improvements to 10 of the 33 Better Junctions are due to be delivered on schedule by Summer 2016
- Central London Grid – 100km of routes to be completed by the end of 2016, with 18km already under construction or complete.
- Safer Lorry Scheme – delivered. New scheme went live Sept 2015. Lorries > 3.5 tonnes fined if without specified safety equipment.
- Cycle Training - TfL has offered cycle training to every school across the Capital, exceeding our target of 24,000 children trained to Bikeability Level 2 by the end of 2015/16
- Cycle Hire – new app launched and expansion of the scheme to Queen Elizabeth Olympic Park
- Cycle parking – on track to meet the Mayor's target for 80,000 new cycling parking spaces across London by end of 2016

North South Cycle Superhighway



CS5 Inner



The Mayor's Vision for Cycling

What has been achieved so far

TfL's Cycling Outcome is to encourage "more people to cycle more safely more often"

Performance monitoring indicates that we are making progress:

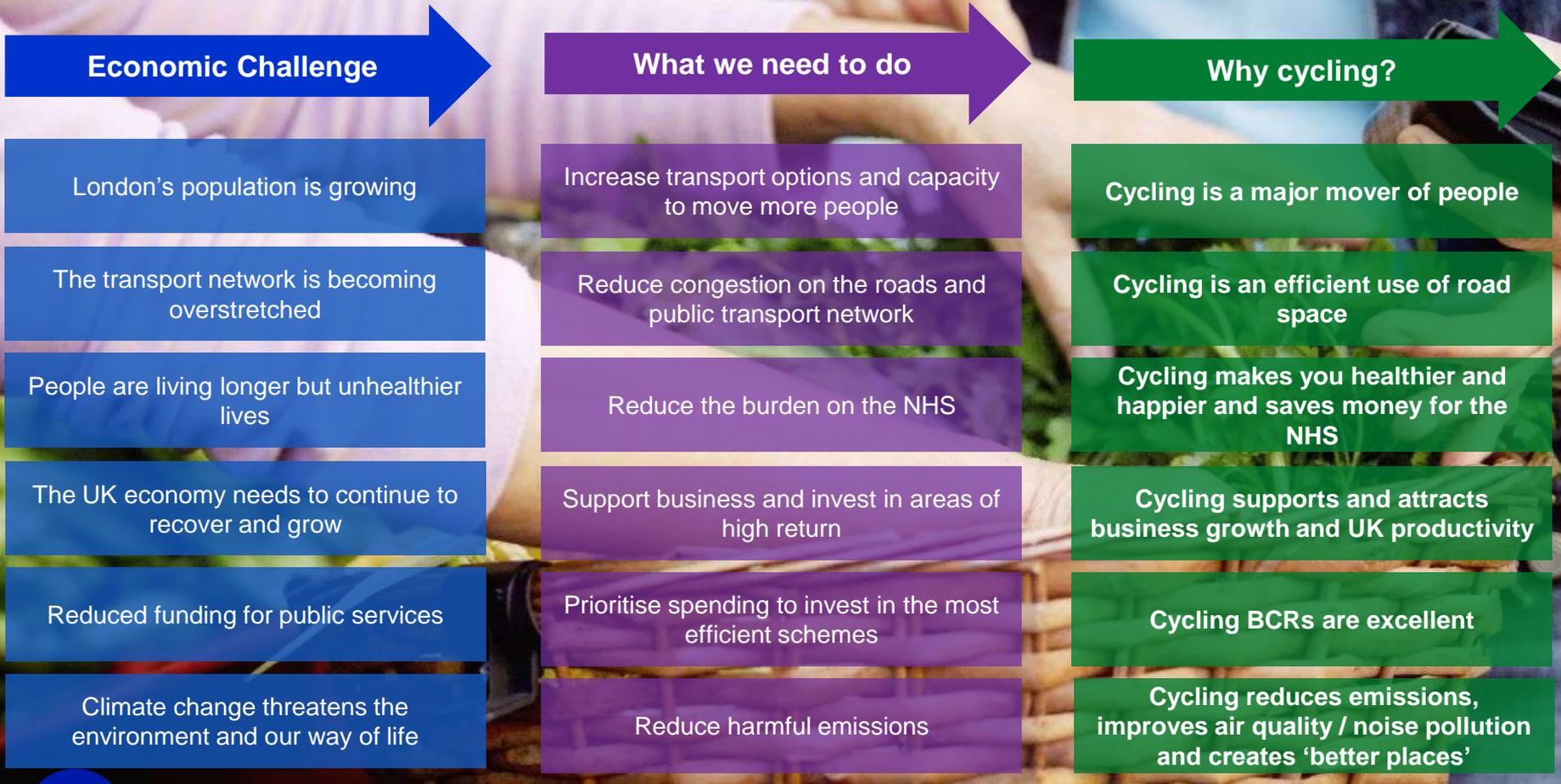
- Cycling journeys on main roads in London increased by 11 per cent (in 2014/15) to the highest levels ever recorded, representing a 243 per cent increase in cycling journeys since 2001/02.
- In 2014, there were 645,000 cycle journey stages in London on an average day. This equates to one fifth of all tube journeys.
- TfL cycle safety data shows that 2014 was the safest year on record for cyclists and provisional data for 2015 is also encouraging.
- There was a 12 per cent drop in the number of cyclists killed and seriously injured on the Capital's roads from 2013 (489 KSIs) compared to 2014 (432 KSIs), bringing the cycling casualty rate down to the lowest ever recorded.



But how does cycling (and the Cycling Vision) support the economy?



Cycling and the Economy



Widespread support from London's businesses

- **'Cycling Works'** is a network of over 160 London employers
- Chief executives from the finance, technology, law, media, and healthcare sectors have come together to state that cycling and segregated lanes are good for employees, businesses, and London

"The city is less polluted; employees are healthier and happier; congestion on public transport is relieved and the city is a more attractive place to live and work. At a fraction of the cost of Crossrail, running additional buses or more trains, this high-capacity cycleway is an extremely smart investment. It will unlock the city to cyclists of all ages and abilities."

Chris Kenyon, founder of CyclingWorks



Wider economic rationale and support for cycling

Case study: DfT

- Reviewed nationwide benefits of cycling

Table 2.1: Summary of BCRs discussed

| | BCR | Comment |
|---|----------|--|
| Sustainable Travel Towns | 4.5:1 | Decongestion benefits only |
| Cycling Demonstration Towns | 2.59:1 | Adult health benefits only |
| Local Sustainable Transport Fund [ex ante appraisal] | 5.1:1 | Based on 12 large schemes business cases |
| Cycling Ambition Grants [ex ante appraisal] | 5.5:1 | Based on business cases for 12 funded schemes |
| Linking Communities Fund | 10:1 | Based on eight representative schemes |
| Literature Review | 5.6:1 | Average BCR for UK case studies, overall average 6.3:1 |
| Transport for London Cycling Vision [ex ante appraisal] | 2.9:1 | Very large programme - conservative BCR |
| Living Streets | 0.1-37:1 | Only subset of benefits monetised |

Case study: The AA

- The UK's leading motoring organisation, say that:

“The ‘us versus them’ mentality of motorists and cyclists had to end, and that increased spending on cycling infrastructure would not be to the detriment of other road users. “The benefits can work both ways. If you get more people cycling that means potentially less traffic congestion,”

Edmond King, the AA



TfL's Cycling business case

What does TfL's own business case for the Cycling Vision show?

- Cycling Vision Business Case – portfolio programmes approved by TfL Board in March 2014 and business case updated in 2015.
- Strong benefit:cost ratio of nearly £3 economic return for every £1 spent (and this is a conservative estimate!).
- Not just monetised benefits – wide range of strategic benefits
- The Cycling Vision economic benefits include:
 - ✓ Better efficiency of road space
 - ✓ Better places to live and work
 - ✓ Attracting globally mobile investment
 - ✓ Health benefits, including reduced absenteeism for employees
 - ✓ Improved safety



Cycling is an efficient use of road space

Road Space and Network Efficiency

- Bikes take up one fifth the amount of road space as a car
- Average car or van occupancy is 1.56, meaning that the average cycle trip is over three times more space efficient per person than each car trip
- The network will need to move even more people as population increases
- Vehicles spend over 80% of their time parked, taking up valuable city space
- Cycle parking is highly space efficient, with one on-street car space able to accommodate up to 10-12 bicycles.



Cycling creates better places for business

Better public spaces that attracts visitors and businesses

- London's roads:
 - ✓ provide 80 per cent of the Capital's public space, but also...
 - ✓ support 80 per cent of all trips, including 90 per cent of freight trips
- Many of the improvements made for cyclists make streets more pleasant for all, by reducing the speed of traffic, making it safer to cross the road and reducing noise and pollution.
- In high street locations such as Bromley North and Long Acre (Westminster), public space improvements have seen higher footfall and a wider range of activities, such as sitting in cafés.

“I believe that cycling is a fundamental part of the future city and has been a critical factor in Google's decision to invest in ...London itself.”

Dan Cobley, Managing Director
Google UK



Cycling for the 'public health' economy

Active Travel helps people live longer better lives and saves NHS costs

- Only 20% of Londoners achieve the 150 minutes per week of physical exercise recommended by the UK Chief Medical Officers - but 60% of Londoners would achieve this if they made their existing shorter daily journeys by walking and cycling.
- The World Health Organisation's Health Economic Assessment Tool indicates that the health benefits of a 400% growth in cycling in London would result in a financial benefit of £248m per year from reduced mortality alone .
- The expenditure in TfL's Cycling Vision Business Case is 'covered' by these monetised health benefits alone.

“I don't think it's any exaggeration to say that the health of millions of our fellow citizens ... and the economic prosperity of Britain all now depend on a radical upgrade in prevention and public health.”

Simon Stevens, NHS Executive

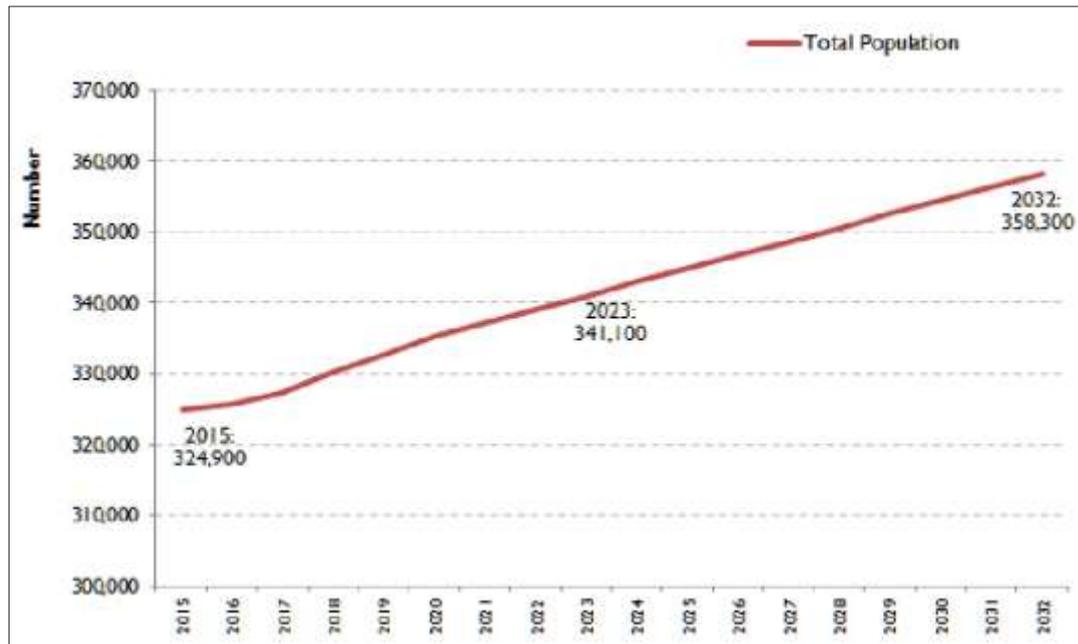


But how can
cycling support
the economy in
Enfield and Outer
London?



Wider context: Outer London faces specific transport and economic challenges

- Outer London will see significant population growth to 2030
- Competing demands for space and capacity. Currently high car use.
- Tensions exist between modes; between place and movement; and competing demands for kerbspace.



Enfield Population
Growth to 2030

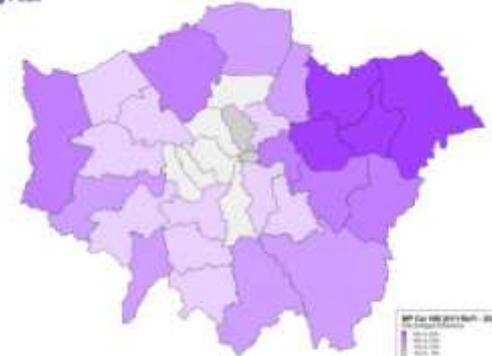


Cycling is part of a package approach to support North London's unique challenges

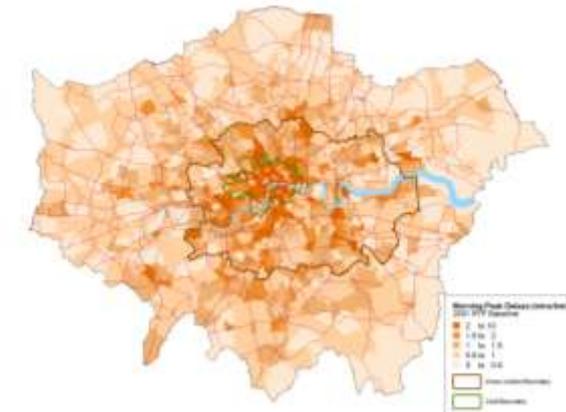
- Traffic in outer London is predicted to increase by 7% between now and 2030, leading to congestion and delays.
- TfL's plan sets out a wider package of transport measures, to address long term challenges in outer London
- A range of projects have been identified to ensure Outer London keeps moving and its economy continues to thrive:
 - Crossrail 2
 - 4-tracking of the WAML
- Cycling is a key part of that package.

Increase in km driven, 2011 - 2031

2011 Ref1 - 2031 Ref6 Car-Km (% Difference)
Morning Peak



Road user delays, 2031



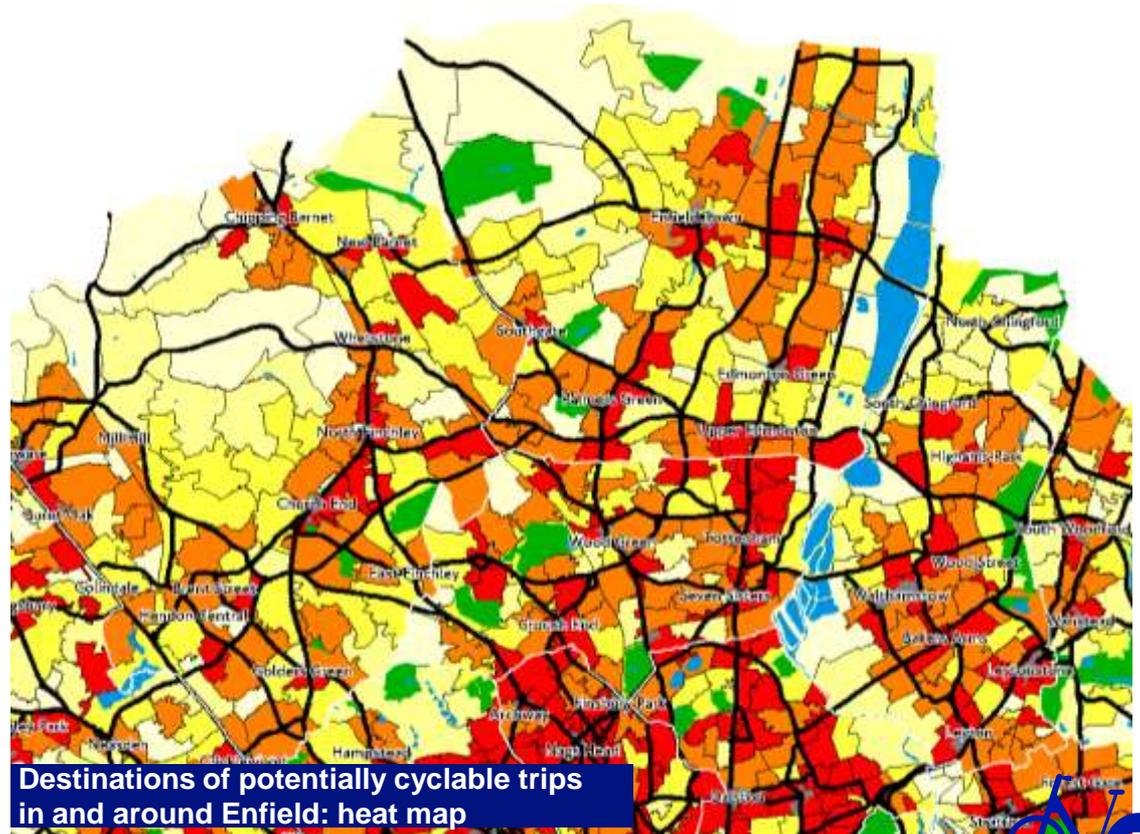
Potential for cycling in Outer London and Enfield

- Analysis of Cycling Potential. Run in 2010 and TfL currently in the process of re-running this year

- 318,000 potentially cyclable trips in Enfield every day

- 73% of these trips currently made by car

- A large proportion of potentially cyclable trips in Enfield are trips into town centres



Supporting the local economy

Addressing the concerns raised by local businesses

- Recent consultations on the transformational Enfield mini-Holland proposals have identified some business concerns.
- Specific concerns that have been raised:
 - **A105 Scheme** – Impacts on shops, businesses and congestion
 - **A110 Southbury Road** - Concerns about possible congestion and traffic diverting down alternate routes, together with the potential impact on residential parking.
 - **Enfield Town Centre** - Concerns about possible congestion and traffic diverting down alternate routes. Reassurances that the final designs would benefit not hinder local businesses. Ensuring that Enfield Town remains accessible and safe to navigate for everyone, including the elderly and people with disabilities.

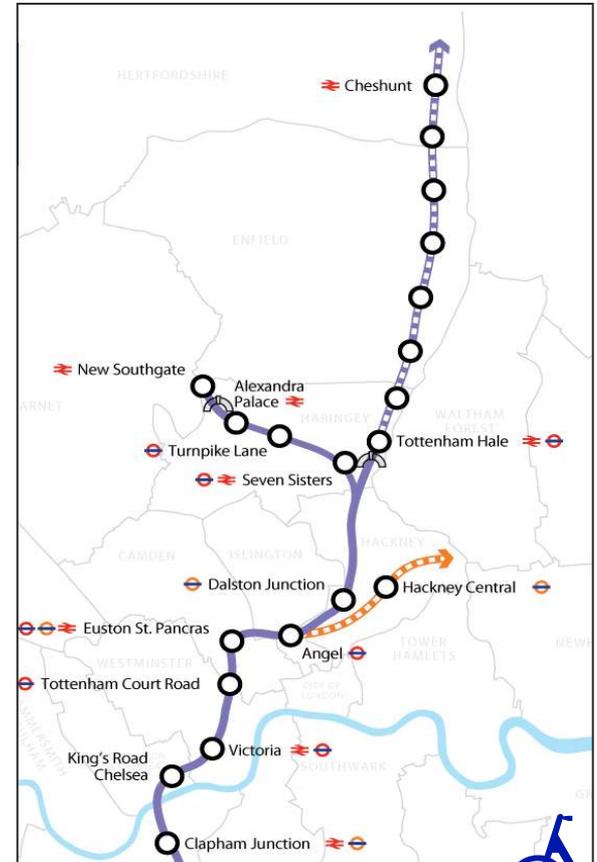


Using cycling as an economic opportunity

Maximising the economic return from Mini-Holland investment in Enfield & Outer London

Further economic opportunities:

- Crossrail 2 – supporting ‘active travel’ access to Crossrail 2 hub stations
- Opening up leisure tourism – e.g. Lea Valley
- Looking out of London - supporting the work of Hertfordshire and Essex, working with their County and District Councils and Local Enterprise Partnerships to join up funding and local networks for cycling.



Taking the next steps – workshop introduction...



Workshop introduction

- **The workshop this afternoon will:**
 - ✓ **Review the ‘economy’-related issues that have been raised through the Enfield mini-Holland consultations**
 - ✓ **Identify further economic opportunities**
 - ✓ **Develop a set of recommendations / action plan to address these**
- **Please join us if you are interested in addressing these issues**



Summary

- London faces significant growth over the next 30 years
- Role of TfL and the Boroughs is to ensure that the transport network can accommodate growth to continue to provide service to all our customers
- Range of transport projects – Roads Modernisation Plan. Key part of this is the Cycling Portfolio.
- For Outer London Boroughs – evidence points towards Mini-Holland style projects best provide the economic benefits for Cycling.
- Acknowledge that local business opposition exists. Need to work hard to mitigate concerns to maximise economic returns.
- Develop a package approach – cycling is a key part of a wider mix





Thank you

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