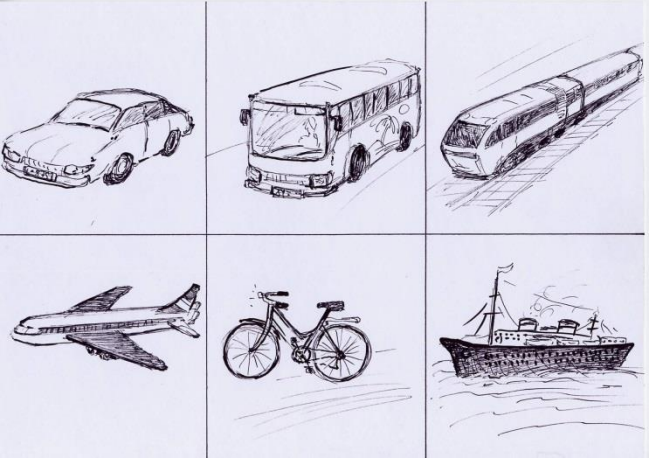


Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

Strategic Travel and Tourism Management

London &

Crossrail Briefing

Heart of Wales Line – 18 November class

https://youtu.be/TPnC4EiXqJU

Strategic Planning in London

Transport for London briefing

TRANSPORT FOR LONDON

EVERY JOURNEY MATTERS

Crossrail briefing

- https://youtu.be/5RnuIiaLxCs

Crossrail

https://youtu.be/cnPs2k0df8M

Transport for London

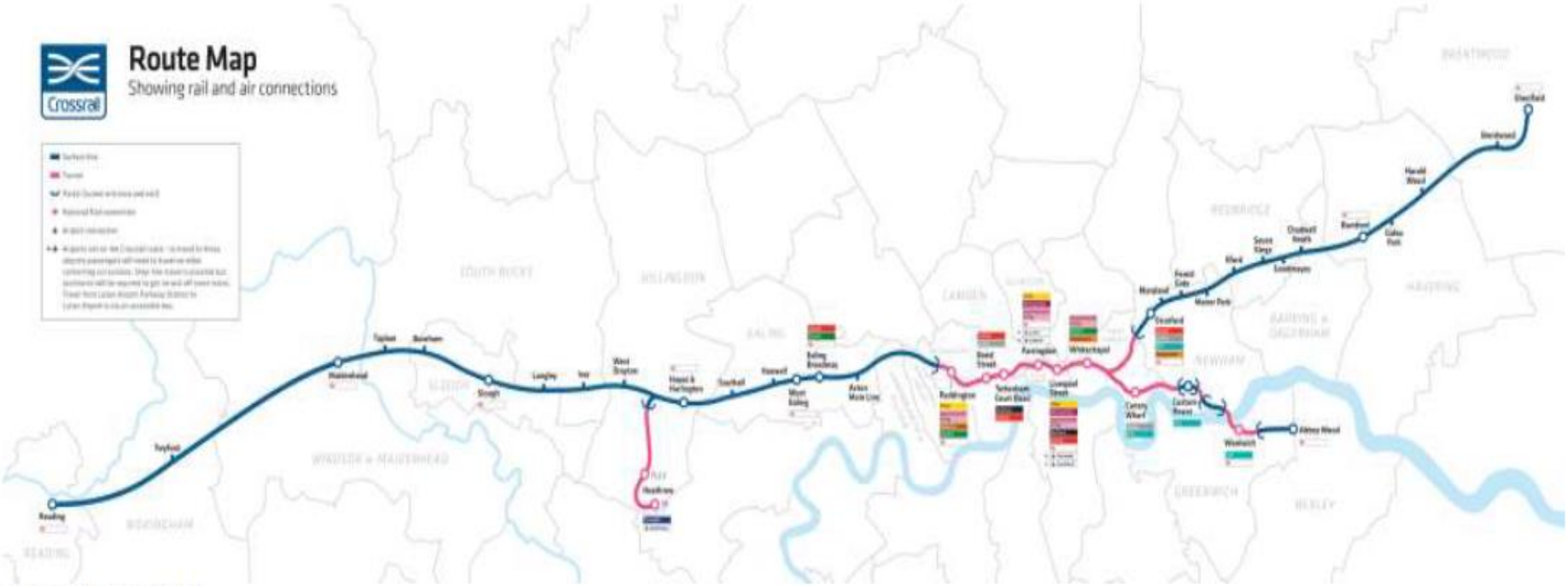
Crossrail

https://www.telegraph.co.uk/news/2018/08/31/london-crossrail-opening-delayed-autumn-2019/

Transport for London

https://youtu.be/dYbBNaD3GsM

7 Appendix 1 – Crossrail route map



Source: Crossrail Ltd

A capital investment:

How the UK economy will benefit from Crossrail

CITY OF LONDON

Crossrail will bring jobs and improved connectivity for London and the South East

People living within a 45-minute commute of the existing major employment centres of the West End, the City and Canary Wharf:

Currently: **5 million**

After Crossrail: **6.5 million**

£42bn
additional GDP for the UK economy - up to £5.87 back for every £1 invested*

Benefits include:
- Growth in UK business earnings
- Increased employment tax receipts

£9.9bn
in net transport economic benefit - up to £2.76 back for every £1 invested*

Benefits include:
- Passenger travel time savings
- Congestion relief on currently crowded transport links

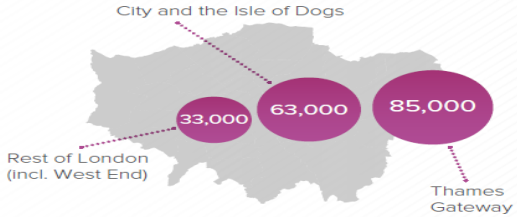
Opening up London

Crossrail will make the city more accessible, boosting employment

8,700
full-time jobs in Crossrail construction over an eight-year period

990
full-time jobs in operation and maintenance once Crossrail is in operation

Additional jobs as a result of Crossrail, by 2023**



Outside the capital

In 2013/14 Crossrail supported an estimated **20,910** additional jobs across the UK through its supply chain, up from **13,800** in 2012/13.

*TfL estimate
**Cebr estimate

Crossrail will reduce journey times, making the City of London even more competitive

Heathrow	Liverpool Street	Canary Wharf
Currently: **55 minutes**	Currently: **21 minutes**	
After Crossrail: **35 minutes**	After Crossrail: **6 minutes**	

Crossrail will reduce congestion on London Underground lines and the Southeastern trains network by between **20%** and **60%**

Sources: Crossrail Ltd, Transport for London (TfL), City of London Corporation

The £15billion Railway

Brings things up to date (almost)

- https://youtu.be/_4UudkGk88U

Benefits to Wales?

- https://www.gov.uk/government/news/crossrail-brings-welsh-business-and-city-of-london-closer-together

- Response to Mayor’s consultation on London’s transport strategy (MTS) to 2041 by the Campaign for Better Transport (CBT)

http://www.bettertransport.org.uk/sites/default/files/pdfs/Mayors_Draft_Transport_Strategy-September_2017.pdf

Key points – CBT:

“Getting transport right is not only vital for the sustainability of the transport system but is also central to addressing the challenges London faces now and in the future.

We share the draft MTS analysis that focuses on cutting motor traffic, boosting public transport and active travel as part of delivering sustainable growth by accommodating more people and fewer cars. “

Breaking the false link between economic growth and traffic growth is central to London having a sustainable future.

London has demonstrated over the years that economic and population growth can be delivered without equivalent traffic growth, with regeneration of the Docklands, for example, enabled by investment in high quality public transport.

In addition London faces environmental and public health challenges from climate change, air pollution and inactivity to which we believe affordable, reliable, accessible public transport for all and a high quality network of spaces for people to walk and cycle are an important part of the solution.

London faces significant economic and demographic change.

The impacts of Brexit are uncertain but likely to provide fresh financial challenges, at a time when central government grant is being withdrawn from TfL.

In addition technological changes bring both opportunities for better access to and planning of transport and mobility services but also fresh challenges on managing congestion from competing providers on London’s busy streets.

An effective transport strategy will recognise that people make end-to-end journeys by a mix of modes, and make travelling by sustainable modes as easy as possible.

This will include smart ticketing and fair fares as well as attractive places.

Joining up with the planning system is also vital so that the location of homes, services and jobs will mitigate the need for people to travel long distances, and their design focuses on encouraging walking and cycling, easy interchange with public transport and suppression of car dependency.

There is a major funding gap in what is needed to deliver sustainable public transport to an expanded Heathrow. Instead of expanding Heathrow, more attention should be given to improving public transport connections for existing customers, disincentivising car travel to airports and improving the interchanges for intercity and international rail for both passengers and freight.

We propose a combination of traffic demand management through introducing measures such as workplace parking levies, road user pricing, smart freight solutions, and using land use planning to move away from car dependency.

We oppose the expensive fallacy that we can build our way out of congestion with new roads, and call for an immediate end to plans for new road-based river crossings in east London: instead, we advocate investing the substantial sums currently allocated for new roads, together with a fair share of London’s VED income, in better walking, cycling and public transport options.

Strategic Planning in action: Crossrail 2?

Research this project

What is the main business case?

How would it be funded?

Timescale?

Campaign for Better Transport's view on Crossrail 2

We support Crossrail 2 as part of an integrated public transport network across the capital.

We note that the case for Crossrail 2 is linked to its potential to unlock new housing sites and support the approach that new homes should be located where public transport links are already in place or are fully. This is vital to deliver the MTS traffic reduction goals.

Crossrail 2 should not be developed as a tube/rail line in isolation but as part of a network of sustainable transport hubs with public realm improvements. We welcome the idea of a network of outer London mini hubs built around good local interchanges for Crossrail2 and for other existing and planned lines.

Why does this matter?
Transport and tourism synergies

- Governments have an important role to play in addressing the inter-linkages between these policy areas e.g.

- Transport policy (e.g. airport/cruise hubs, roads, public transport) can shape access to and travel patterns within destinations, influencing visitor accessibility, mobility and satisfaction;

- Transport policy can facilitate a shift to more eco-friendly transport options, enabling destinations to position themselves as sustainable;

- Tourism policies can stimulate movement to and within a destination, which can in turn emphasise seasonal peaks and troughs, push transport capacity limits, and place pressure on existing infrastructure capacity;

- Conversely, tourism policies can help to secure the economic viability of local transport systems

- Note therefore the importance of the transport sector in supporting and facilitating tourism growth.

(International Transport Forum, 2015)

Hub breakouts – 30m

“Transport is the lifeblood of the travel and tourism industry and failure to take action and improve performance in this area could result in harsh penalties for travel and tourism companies and increased costs for travellers.”

(World Travel & Tourism Council, 1997)

Co-ordinated action needed in…

- Regulatory mechanisms (e.g. emissions)
- Financial mechanisms (subsidies)
- Introduction of new greener technology
- Integrated planning so that land use and transport planning should minimise the distance for travel for work and leisure activities (e.g. work and shopping)

(Hall, 1993)

Economic Benefits of Crossrail:
Heart of London Business Alliance (2017)

Infrastructure

- For our businesses to succeed, connectivity is crucial. The Night Tube on weekends has allowed our members' staff to come to by public transport and enabled more visitors to enjoy our evening and night time offer.
- We look forward to the opening of the new Elizabeth Line next year which adds additional visitors, arriving more sustainably, to the heart of London.

- However, ensuring London continues to be a thriving World City requires the introduction of more airport capacity in the South East, as well as further investment in additional transport links and capacity improvement to Central London. We therefore urge Government to press ahead with increased airport capacity and runways in the South East, and to finalise a route and funding agreement for Crossrail 2 with the Mayor of London to enhance London's connectivity.

Claude Abi-Gerges, McDonald’s:

“Whilst the Elizabeth line will ease travel into central London, in order to improve the visitors overall experience, we still require increased capacity through an extra airport terminal“

Conclusion

- We are the heart of the world's capital city. We and our members strive to make ours the most visited city in the world. We believe that we can increase visitor numbers year on year, through a unique, diversified and world class offering. London is the driver for visitor growth to the UK; our success brings more visitors to every region of Britain. By delivering on our priorities, we benefit the whole country.
- Our priorities aim to enhance our status, continue to improve our area and ensure that London remains the number one city destination in the world. We ask for the Government's support in this through the policy areas outlined above.

Royal Town Planning Institute (2014)

In order for the UK to compete globally, and ensure sustainable economic development across the country, the RTPI believes that we need to find new and better ways to ensure that the importance of infrastructure provision, as a key driver of growth and transformation, is fully recognised.

This will enable greater consensus to be achieved, and the barriers removed.

The RTPI believes that the effective planning and delivery of infrastructure has the ability to deliver much wider, transformative benefits for regional areas, local communities, and the UK as a whole, than are commonly perceived to be the derivatives of transport infrastructure provision.

The Crossrail project will be completed in 2017 and will connect Maidenhead in Berkshire with Abbey Wood in South East London and Shenfield in Essex, via stations in Central London, at an estimated total cost of around £15.5bn.

A ‘business rate supplement’ (2% on non-domestic property values with a rateable value of more than £55,000) is being raised on companies within London, as a contribution based on the projected economic benefits that the project will deliver.

While such a levy is an innovation for UK infrastructure funding methods, the UK lags far behind other countries for the implementation of such schemes.

Additionally, the money raised from the Crossrail Business Rate Supplement is only a fraction of the true scale of the quantifiable economic benefits. For example, increases in land-value for existing property owners of properties that are both, domestic and non-domestic are not captured…..

A recent study has suggested that the projected increases in property values, just for sites within the immediate vicinity of a new Crossrail station, will amount to one third of the total cost of the project.

This is a clear example of a windfall gain for property owners, on account of a public project, which could be justifiably recouped through a measurable process.

Crossrail Property Impact Study (GVA, 2012)

Crossrail is among the most significant infrastructure projects ever undertaken in the UK. From improving journey times across London, to easing congestion and offering better connections, Crossrail will change the way people travel around the capital.

But perhaps the most immediate and tangible benefits that Crossrail will unlock include:

- The creation of new stations and additional rail capacity;
- Enhancing stations and their surrounding urban environments; originating new over-site development opportunities above stations;
- Helping generate and focus development and investment activity along the route;
- Supporting the future economic growth of the UK, helping to maintain London's status as a global city.

Crossrail is more than a new rail link, it will be the catalyst for regeneration in key locations and a driver of London's economic growth, in particular from a property perspective.

The transport aims are set out in the Mayor's 2017 Transport Strategy:

- Support sustainable economic development

and population growth by increasing transport capacity, reducing congestion on the transport network;

- Improve transport connectivity through journey time savings;
- Bring wider benefits including: enhancing accessibility (including those with restricted mobility) thereby improving people's access to jobs, schools and other locations; improved transport safety with reduced road accidents; and environmental improvements; including a reduction in CO2 emissions.

How much extra capacity?

Crossrail represents the largest single increase in London's transport capacity since the 1940s and will provide an immediate 10% increase in the capacity in London's rail-based transport system.

The legacy of Crossrail will be far reaching. The investment will not only create new stations and significant additional rail capacity, it will also bring forward a substantial enhancement to the physical urban environment around each of the stations along the route, helping to create and focus development investment and activity.

Coupled with increased accessibility and capacity, Crossrail will help to unlock areas of under-used land and sites for new investment and development as well as promoting a wider mix of uses and development activities in a wider zone of influence around each station.

Crossrail will be a true catalyst for transformation and regeneration.

Debrezion et al (2004) recognise that property market impacts of any rail scheme diminish in influence, the further property is located from the Station.

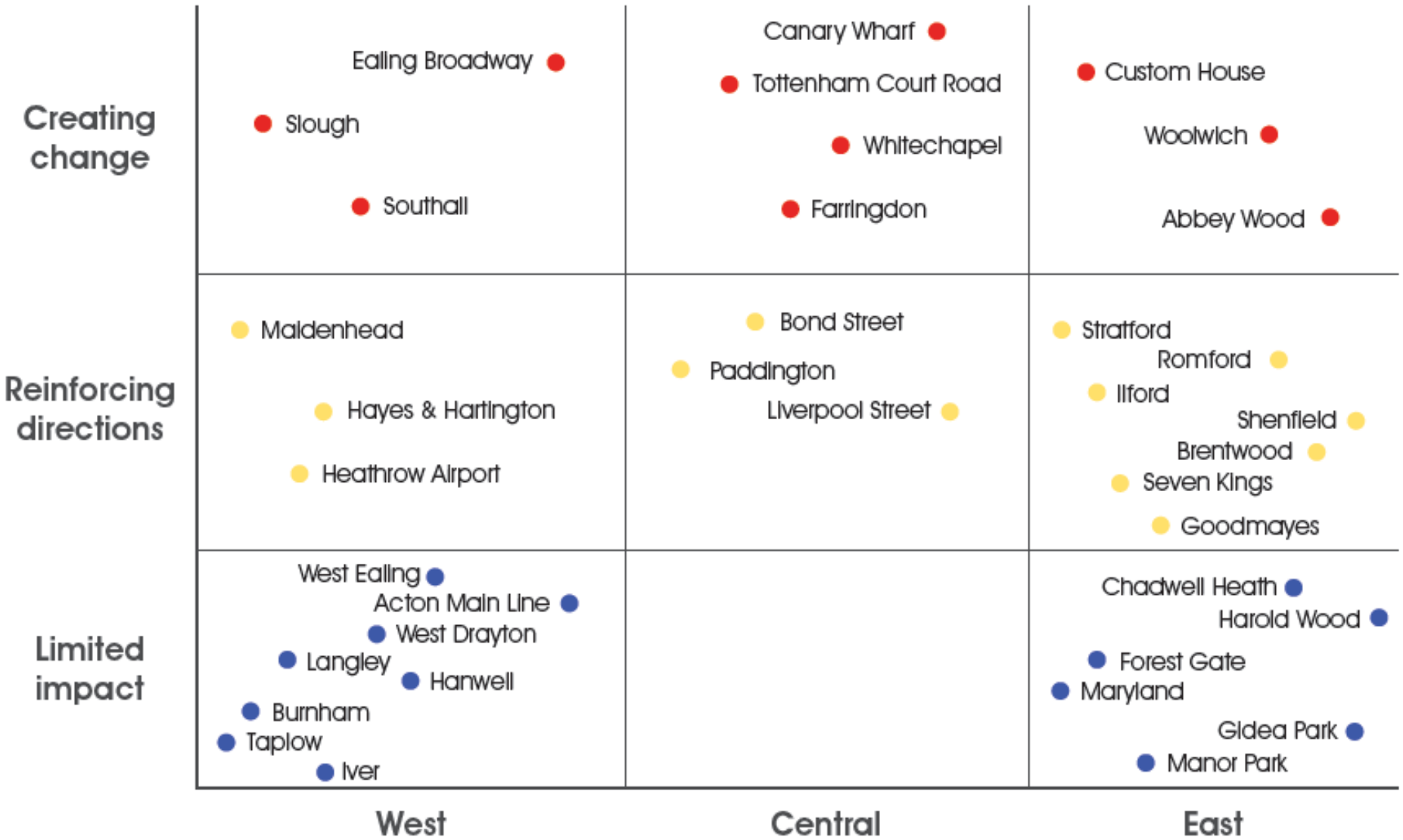
They identified a diminishing (or inverse) non-linear relationship between price and distance:

The impact of Crossrail will be vitally important in improving London’s connectivity, providing an essential west to east link through Central London and providing direct links to major suburban town centres.

Additional and faster connections to Heathrow Airport and London City Airport will be an important business consideration.

Crossrail can change perceptions and support regeneration in wider areas where it will provide a clear new level of service, improved access to employment, underlying market performance is strong and there is the local ambition and opportunity for change.

Property Values Impact



22%

OF RESPONDENTS WERE 'WEALTHY URBANITES'

THE WEST END CATCHMENT AREA WILL INCREASE BY:

28%

THE EQUIVALENT OF 1.5 MILLION EXTRA SHOPPERS

SHARE OF RESPONDENTS THAT WILL VISIT THE WEST END MORE FREQUENTLY POST CROSSRAIL

65%

38%

FOOTFALL TO SPEND CONVERSION RATE IN 2015

AVERAGE DOMESTIC BASKET SIZE

£121

(TOURIST AV. BASKET: £168)

NUMBER OF RESPONDENTS THAT WOULD BE ENCOURAGED TO SHOP MORE FREQUENTLY IF THE NWEC WAS LESS CROWDED:

41%

Source:
NWEC, 2015

NEW WEST END CATCHMENT AREA TO INCREASE BY

28%

WITH MARKET SHARE GROWING 20-40% ALONG CROSSRAIL ROUTE

RESPONDENTS WERE AWARE OF CROSSRAIL TIME SAVING

67%

KNEW THEIR JOURNEY WOULD BE FASTER.

FEW RESPONDENTS KNEW THAT THERE WOULD BE A COST SAVING, ONLY

31%

KNEW THEIR JOURNEYS WOULD BE CHEAPER

POST-CROSSRAIL TURNOVER FOR THE WEST END IS EXPECTED TO INCREASE TO

£11.25BN

BY 2020, UP FROM £8.8BN CURRENTLY

THE BUSIEST TIME IN THE WEST END IS:

3 O'CLOCK

TRAFFIC IS 30% HIGHER ON SATURDAY AT 3PM THAN ON ANY OTHER DAY OF THE WEEK

BOND STREET WILL HAVE

24 trains

AN HOUR RUNNING IN EACH DIRECTION

AND 150,000 TO 220,000 DAILY PASSENGERS EXITING INTO THE WEST END

3 Economic benefits

Crossrail's wider benefits could generate £42 billion additional GDP for the UK economy

3.1 Short-term impacts

- Crossrail construction will generate around 8,700 permanent full-time jobs over an eight-year period – given the project and specialist labour required, these jobs are likely to be filled from the London and wider UK or international market.
- Operation and maintenance employment will create an additional 990 full-time jobs once Crossrail is in operation.
- Looking ahead, station staff requirement will create 25 to 30 jobs per station at new central stations (from Paddington to Whitechapel).
- Further jobs will come from indirect impacts e.g. firms supplying the project during construction and providing services to those directly employed by Crossrail.
- Crossrail is expected to create 14,500 jobs in total during its construction and operation (including direct, indirect and induced employment). However these will not all be new jobs due to some local redistribution and displacement.
- More than 400 apprenticeships are expected to be created over the course of the project (over 350 have been created at January 2015), and its Tunnelling and Underground Construction Academy will train up to 3,500 people.
- British businesses have been awarded 97% of contracts. These suppliers are located across the UK – 62% of them outside of London – extending economic benefit from the project across the country.
    - In 2013/14 Crossrail supported an estimated 20,910 additional jobs across the UK through its supply chain, up from 13,800 in 2012/13.
    - Small and medium-sized businesses stand to benefit significantly benefit: 62% of work is going to SMEs.

- Crossrail will bring 1.5 million more people within a 45 minutes commute of the existing major employment centres of the West End, the City and Canary Wharf (up from 5 million currently) – giving employers better access to a wider and more highly skilled pool of labour.

- Crossrail is projected to generate £9.9 billion in net transport economic benefit, equivalent to £2.76 for every £1 spent using Transport for London (TFL)'s methodology, or £5.4 billion and £1.97 for every £1 spent using the Department for Transport (DfT)'s methodology. Volterra estimate user benefits at £5 billion. These figures include:
    - Passenger travel time savings.
    - Congestion relief on currently crowded road, rail and London Underground links.
    - 40% of these transport benefits derive from Crossrail's ability to increase the capacity of London's transport network to meet existing and future needs.

Wider economic benefits in terms of increased Gross Domestic Product (GDP) for the UK economy estimates vary; TfL methodology forecasts total benefit at £42 billion, or £3.97 to £5.87 for every £1 spent, and DfT methodology estimates £6-15 billion, or £3.09 to £3.53 for every £1 spent. Volterra have estimated the wider benefits at £44 billion. These benefits include:

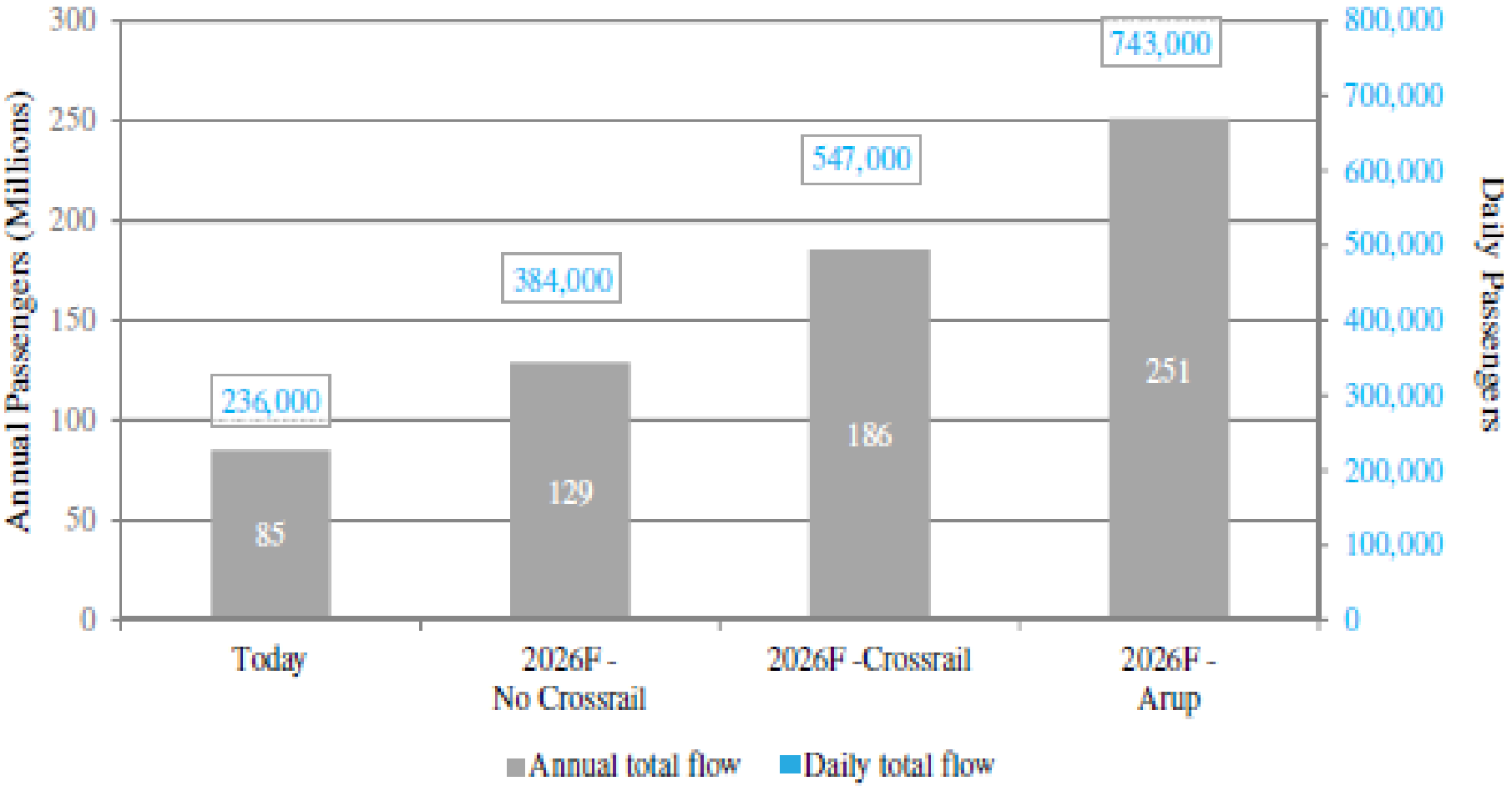
- Increased tax receipts to the government (TfL - £7 billion to £18 billion, DfT - £6 billion to £9 billion, Volterra - £14 billion).
- Enabling the growth of Central London employment, generating higher earnings for UK businesses, and increased employment tax receipts.

Arup Report (2014)

- Projected passenger demand much higher than expected in central stations such as Tottenham Court Road
- Bond Street,Tottenham Court Road and Farringdon stations will deliver some745,000 people to Central London per day in the year 2026

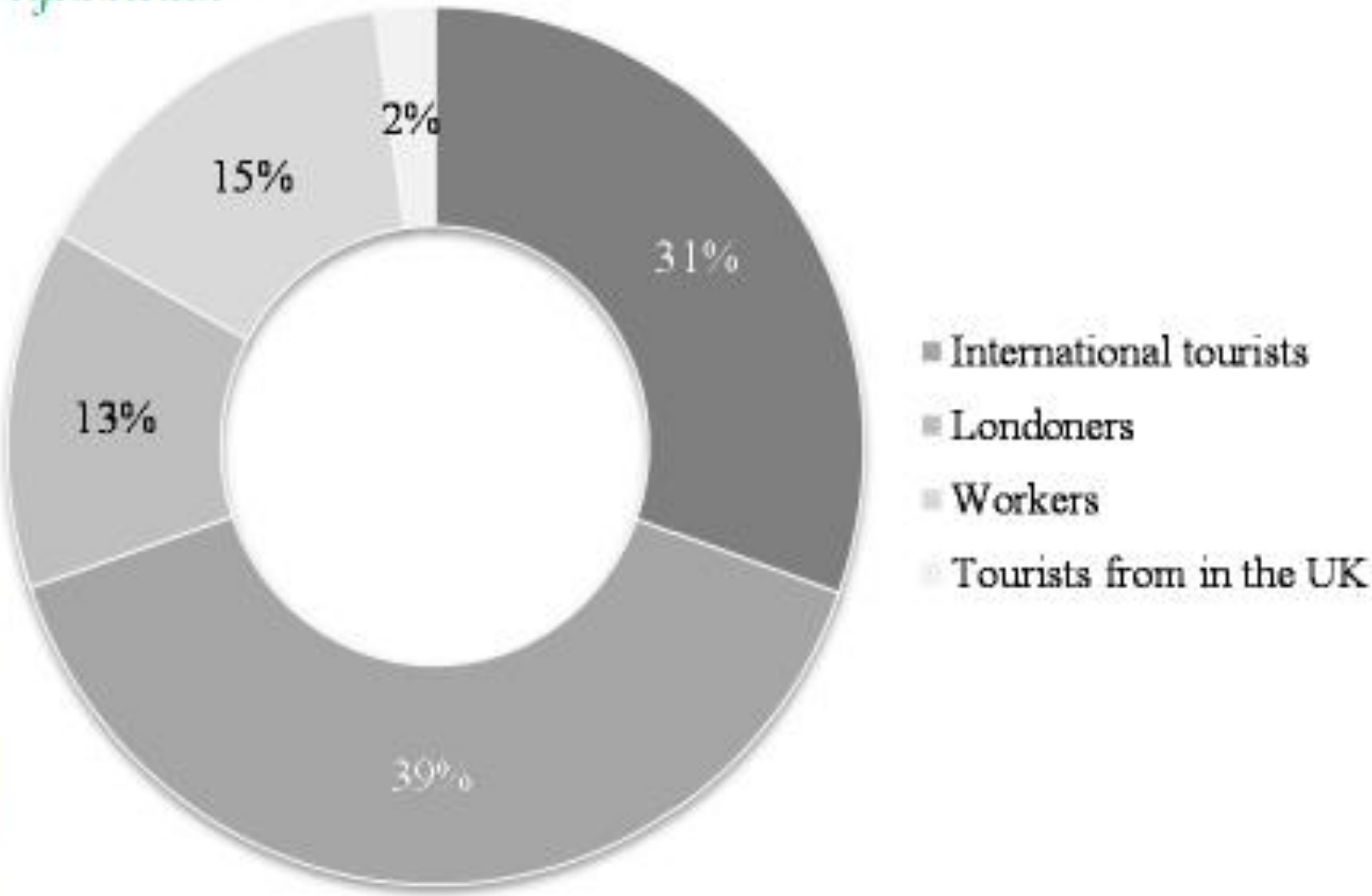
Representing:

- Some 195,000 more passengers per day in 2026 than the (2004) Crossrail forecasts would have projected; and
- Roughly 510,000 additional passengers per day than currently use the station.


Annual Passengers (Millions)
300
250
200
150
100
50
0
Daily Passengers
800,000
700,000
600,000
500,000
400,000
300,000
200,000
100,000
0
236,000
384,000
547,000
743,000
85
129
186
251
Today
2026F - No Crossrail
2026F -Crossrail
2026F - Arup
Annual total flow
Daily total flow

Projected growth indicates a tremendous opportunity for businesses operating in Central London. Retailers and the food and beverage sector in particular, could benefit from increased footfall. Capitalising upon the opportunities additional visitors bring will however, require a range of responses in order to ensure Central London's neighbourhoods remain unique, sought out visitor attractions and liveable, vibrant neighbourhoods for their residents and local businesses. Building on existing public realm improvements planned for Crossrail, pressures from growth will

d projections



Source: CBRE

Implied average distribution of visitors to Oxford Street, Regent Street and Bond Street

Activity:

Consider how TfL acts as a single regulator for transport in London.

Draw parallels with how TfW has been set up in Wales

Cover a range of transport issues and their connectivity

Transport for London

Your destination
Awesome place
Time of flight
18|50
AIR TICKET
Your name
Last name
Address
Sites
Lorem ipsum dolor sit amet, consectetur adipisicin
PASSPORT

Next time

- Hub 3: Air
- Hub 4: Rail

Seminars plus supporting material