

# Delivering London - the inconvenient truth

Freight Policy Advisory Panel

Alan Barrie | 16 October 2019



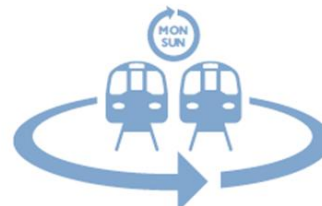
# A growing, thriving world city



That's a full car every 26 minutes

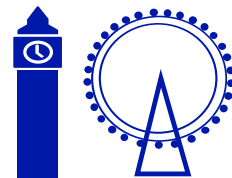


Or 2 buses every day



Or 2 Tube trains every week

Today the population is 8,600,000 and by 2030 will be around 10,000,000



# Transport for London – keeping London moving



**6 million** bus journeys on the  
**9,300** buses across  
**675** routes



**29,000**

daily cycle hire  
journeys



**4 million**  
tube journeys every day



**580km**

of road – 5% of the Capital's  
but carrying 30% of its traffic

**6,300**  
traffic signals



# ... and creating a greener, healthier, more prosperous city



**80%** sustainable mode share by 2041; and **20 minutes** of active travel per day for all by 2041



Vision **zero** for road safety by 2041



**Zero** emission by 2050



**3 million** fewer private car trips; and **10-15%** reduction in overall traffic by 2041



**10%** less in central London am peak 2026



# The exponential growth of eCommerce



Estimated **20%** of UK eCommerce orders - **500 million** parcels delivered in London per year; a figure growing at **15%** each year



# The exponential growth of eCommerce and its impacts



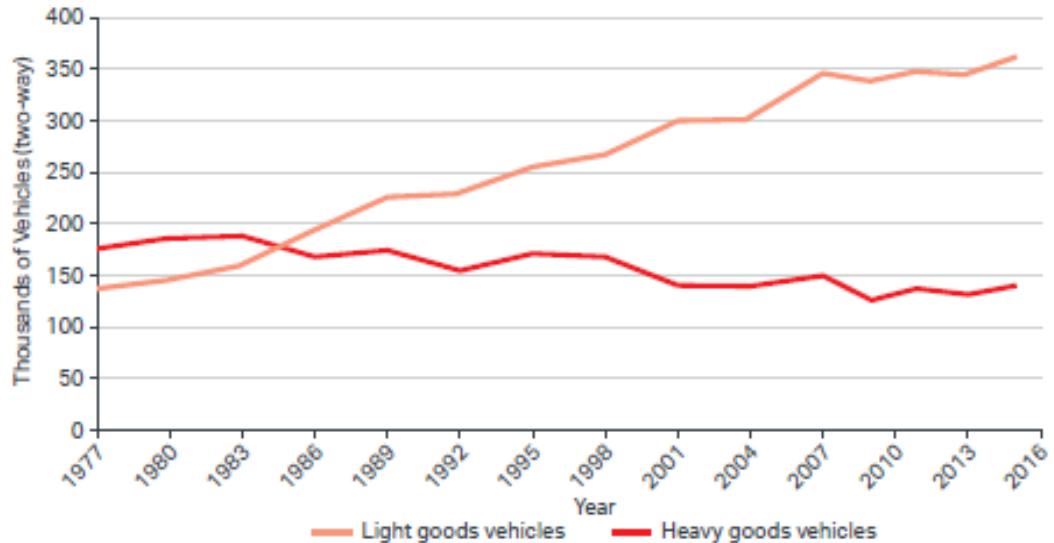
Estimated **20%** of UK eCommerce orders - **500 million** parcels delivered in London per year; a figure growing at **15%** each year

**54%** 

increase in van kilometres in London over the previous 25 years

... And forecast to grow by

**43%** over the next 25 years

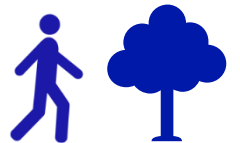


Vans and lorry crossings per day over Greater London boundary 1977-2016





Lorries & vans make up **20%** of road traffic in London, **33%** in c. London in the AM peak  
**2 million** people in London are living with illegal air pollution, with road transport responsible  
for **50%** of the main air pollutants  
“...a public health crisis”

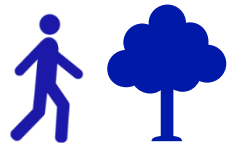




Lorries & vans make up **20%** of road traffic in London, **33%** in c. London in the AM peak  
**2 million** people in London are living with illegal air pollution, with road transport responsible for **50%** of the main air pollutants  
“...a public health crisis”



**34%** of online shoppers don't trust delivery drivers to deliver successfully  
**12.6%** of deliveries are either late or failed  
Londoners return **66 million** items of clothing every year to those retailers offering free returns alone  
**77%** of UK shoppers are conscious of the environmental impact of online deliveries







Lorries & vans make up **20%** of road traffic in London, **33%** in c. London in the AM peak  
**2 million** people in London are living with illegal air pollution, with road transport responsible for **50%** of the main air pollutants  
“...a public health crisis”



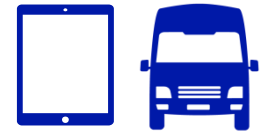
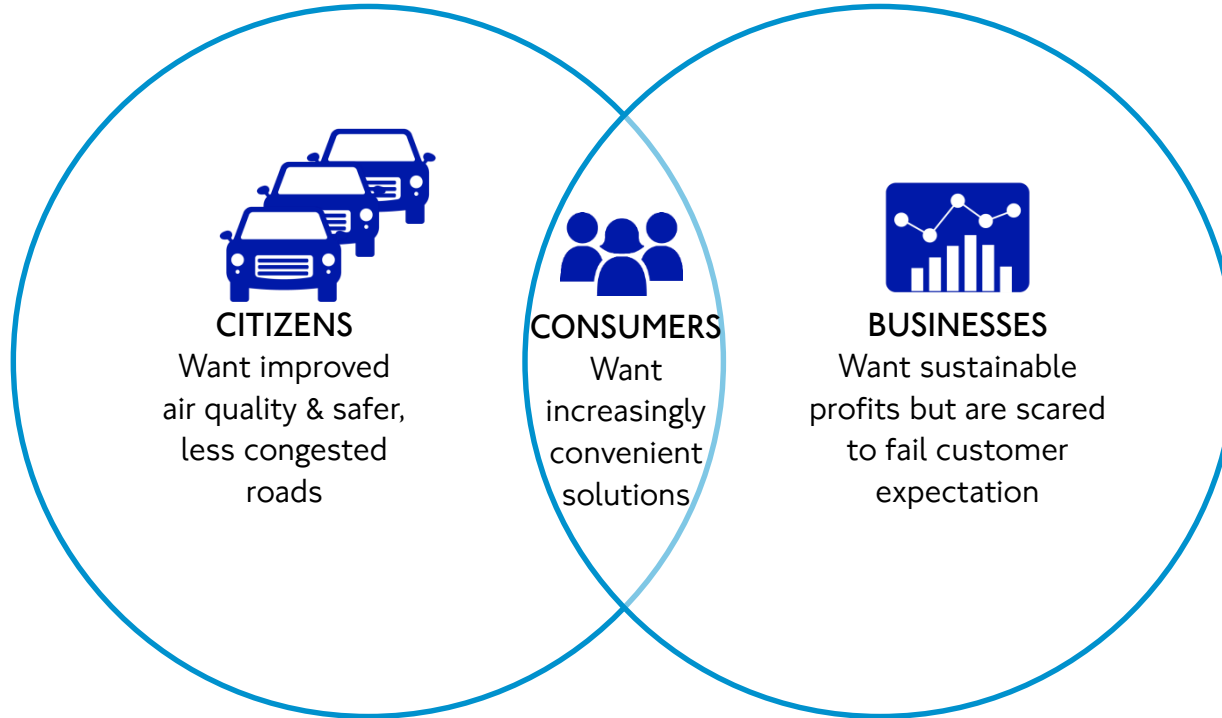
**34%** of online shoppers don't trust delivery drivers to deliver successfully  
**12.6%** of deliveries are either late or failed  
Londoners return **66 million** items of clothing every year to those retailers offering free returns alone  
**77%** of UK shoppers are conscious of the environmental impact of online deliveries



Fulfilment costs are by far the biggest overhead as a percentage of sales, for some leading retailers this is as high as **28%**  
Missed deliveries add roughly **26 million** additional deliveries to London's roads every year  
**£9.5 billion** estimated cost of congestion to London in 2017



# Our trilemma; three audiences with opposing needs



# A big challenge



Disaggregated infrastructure with no end-to-end view of customer behaviour(s)



Little commercial appetite for key players to change current model



Ever increasing consumer expectations



# With huge opportunity



Improve consumer experience



Reduce congestion and emissions



Better commercial utilisation for TfL



Build a blueprint for other cities



# The foundations for new solution(s)

## 1. Map the journey



End-to-end journeys, pain points and use cases



Partner infrastructure & problem areas

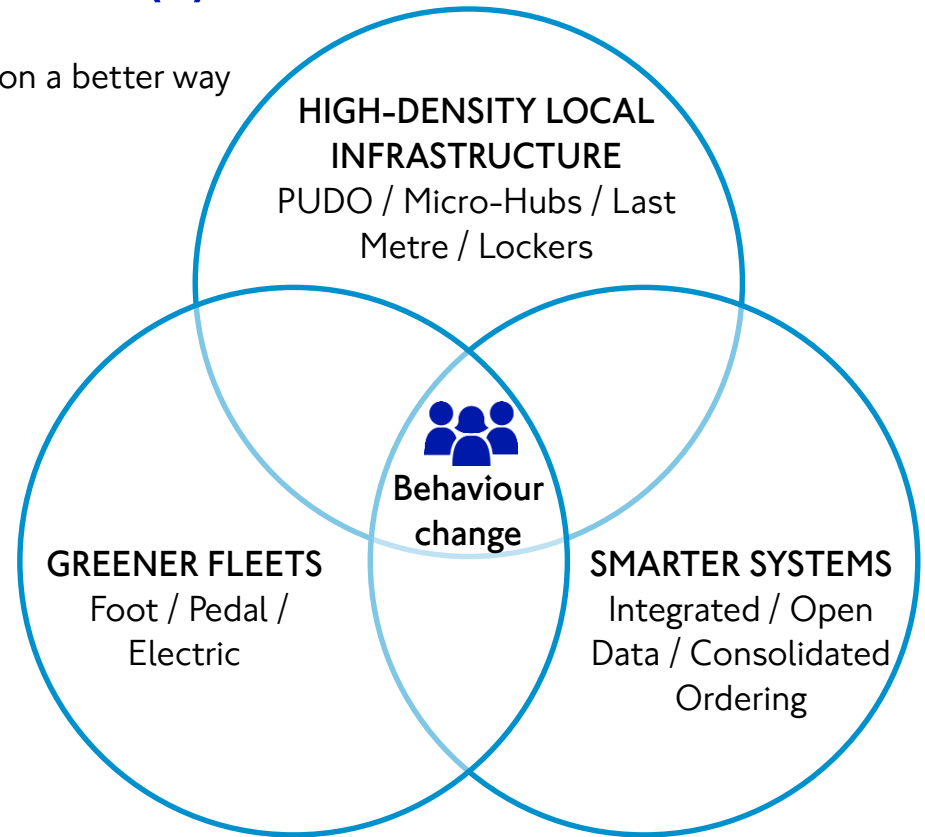


High-impact scenarios to environment & business



TfL assets & real estate network

## 2. Envision a better way



# Collaborative design with a consumer focus



RETAILERS



INTERMEDIARIES



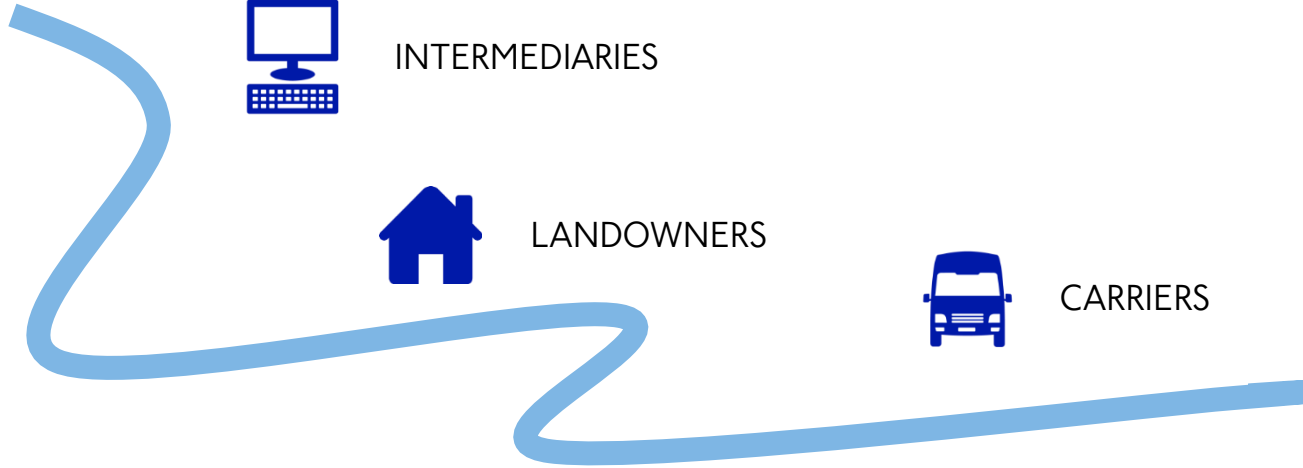
LANDOWNERS



CARRIERS



CUSTOMERS



# What could collaboration look like?

## GREENER FLEETS

- Fleet EV conversion plan
- Modal alternatives conversion plan
- Fleet Standards commitment (eg FORS)

Measure: % EV transition/time

Measure: % modal conversion/time

## SMARTER SYSTEMS

- Order consolidation capability
- Eco-friendly option at checkout
- Eco default checkout selection at checkout

Measure: # active registered users

Measure: % Eco option selected at checkout

Measure: % orders consolidated

## HIGH DENSITY LOCAL NETWORKS

- Carrier agnostic lockers
- Carrier agnostic PUDO's
- Micro hubs

Measure: % 'out of home' delivered

Measure: % utilisation of capacity

Measure: CO2 reduction

Measure: km millions avoided



London needs radical **alternatives** that **reduces** impact on the **environment** and business; while enhancing **customer-experience**.





Contact

Alan Barrie

[v\\_AlانBarrie@tfl.gov.uk](mailto:v_AlانBarrie@tfl.gov.uk)

+44 7885 626827

