Appendix C:

A summary of insights on specific focus areas

Vision Zero: Spotlight on Motorcycle Safety

Background

The Mayor's Vision Zero goal aims to eliminate road deaths and serious injuries on London's roads by 2041. Camden's transport strategy reflects this goal of zero deaths and injuries in Camden by 2041 and outlines targets for reducing killed and seriously injured casualties (KSIs) in the borough. The targets aim to limit KSIs to less than 80 by 2022 and less than 55 by 2030. As shown below, while we are still on track to meet our KSI targets in the long-term until 2041, there is currently a gap between our actual numbers and shorter-term targets.

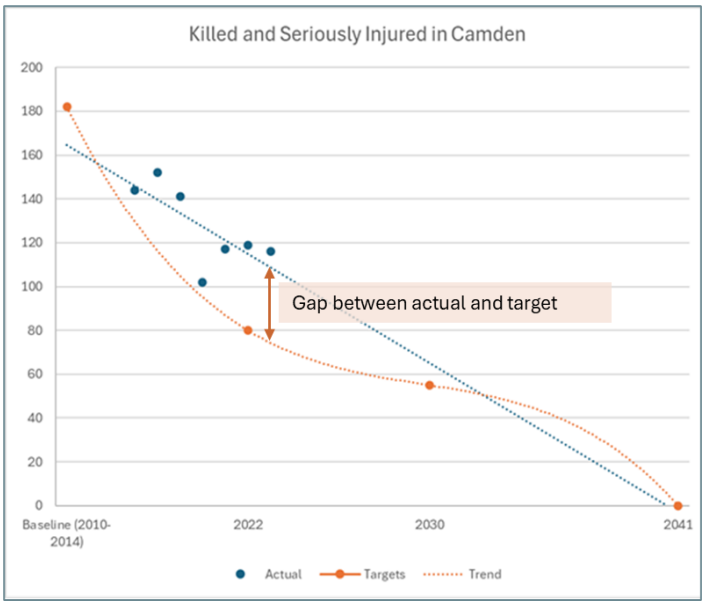
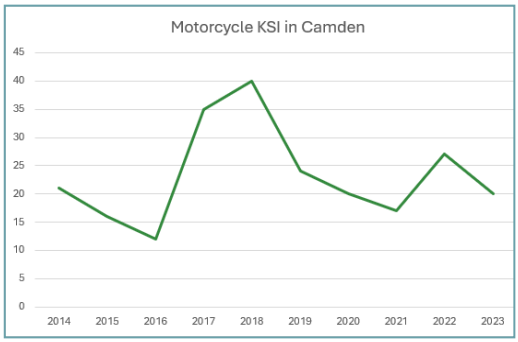


Figure 1: KSIs in Camden

Left: *KSI trends against Visions Zero targets*
Below: *Motorcycle KSIs from 2014 to 2023*



Between 2019 and 2023, vulnerable road users[1] (pedestrians, cyclists, and motorcyclists) comprised 90 percent of all KSIs.[2] Addressing collisions involving vulnerable road users (VRUs) is key to achieving the Vision Zero goal, and Camden tracks progress against this goal by monitoring KSIs involving each VRU. In line with this, we have

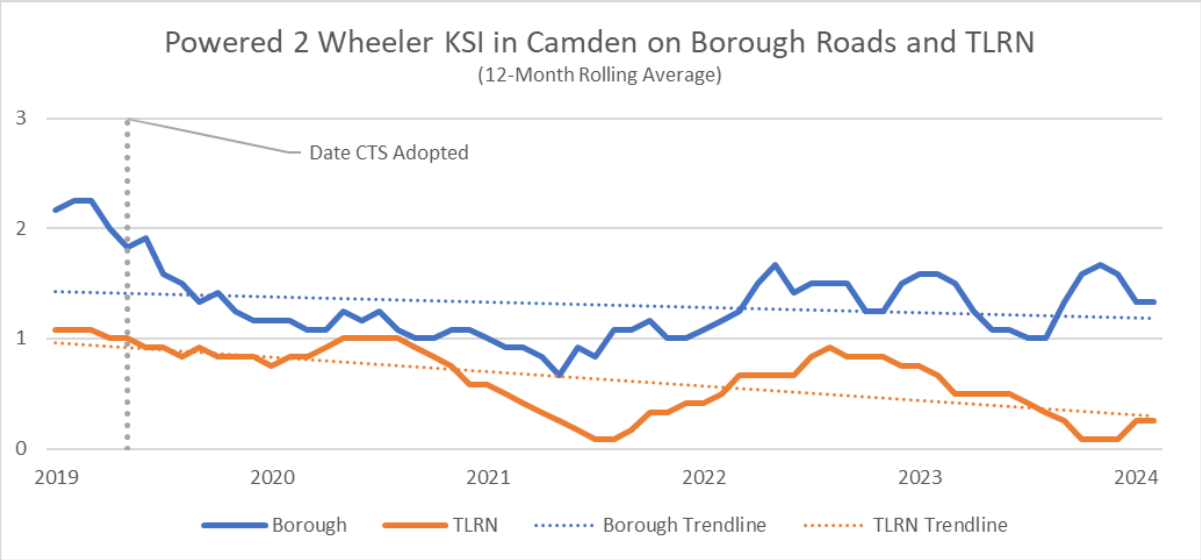
[1] As per the Royal Society for the Prevention of Accidents, a vulnerable road user refers to those who have less crash protection than occupants of motor vehicles and therefore have a higher risk of being injured or killed in a road crash.
[2] STATS19, Department for Transport

undertaken a review of motorcyclist casualties in the Borough to identify opportunities to improve safety with an aim to reduce the number and severity of collisions.

Powered two-wheelers (P2Ws)[3] comprise about 18 percent of total KSIs in the borough[4] Reducing P2W KSIs is important to achieve the Vision Zero goal in Camden. It should be noted though that P2W KSIs in the borough have reduced by 50 percent in 2023 as compared to the baseline of (2010-2014).[5]

Figure 2 shows the more recent trend of P2W KSIs in Camden since the adoption of the CTS in 2019. While P2W KSIs have reduced overall since the adoption of the CTS, they have not followed a consistent trend of reduction to put us on track to achieve our Vision Zero goal.

Figure 2: 12-month rolling average of P2W KSIs (Camden highways and TLRN - TfL Roads in Camden)



As for the broader trends, total P2W licenses in London are climbing back up after a sustained decrease between 2017 and 2019.[6] Particularly, P2Ws licensed to companies is growing as compared to those licensed for private use. While the reason for this trend is yet to be fully ascertained, it potentially reflects the increase in online deliveries in the last few years.

Given all these factors, there is a need for a deeper review of collisions involving P2Ws in Camden. This "spotlight" on motorcycle safety aims to better understand the risks

[3] Powered Two-Wheelers (P2Ws) are a broad category of two-wheeled vehicles with varying engine capacities and speeds. It includes motorcycles, mopeds, and electric-powered scooters. Throughout this report, "P2W" is used interchangeably with "motorcyclist".
[4] This figure is based on a 5-year average between 2019 and 2023 calculated using the STATS19 data (latest available data).
[5] Casualties in Greater London during 2023: Data annex, Transport for London
[6] Vehicle Licensing Statistics (2024-2010), DfT and DVLA

contributing to P2W collisions and identifies next steps for the forthcoming three-year period (as part of the CTS Delivery Plan 2025-28) to help address these risks.

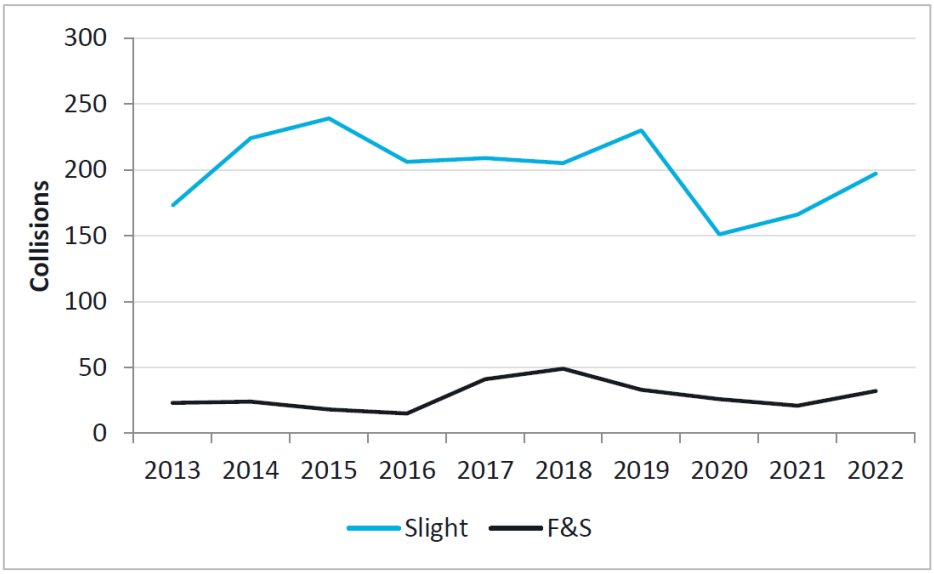
Analysis and Insights

Collision data (STATS19) from the previous 10-year period (2013 - 2022) was analysed to build an understanding of P2W collisions.[7] It is important to note that there are limitations to STATS19 collision data because of issues relating to underreporting, misreporting, and errors in capturing data. It is, however, the best dataset currently available to the council for evaluating collision risks. Below are some broad patterns with respect of P2W collisions:

Increases in 2022 after pandemic-related decreases

Both slight as well as fatal and serious (F&S) P2W collisions have increased in 2022, mirroring a broader trend of all collisions increasing in 2022 in Camden and across London.[8] Prior to this increase in 2022, F&S P2W collisions were on a declining trend since the 2018. Most recent data, however, indicates that P2W collisions have come back down in 2023. It is worth noting that overall P2W collisions in Camden in 2023 (see Figure 1 for 2023 data) were broadly at the level observed in 2014, which is almost a decade ago, indicating that we have more progress to be made in the coming years to achieve our Vision Zero goal.

Figure 3: P2W collisions in Camden (slight and F&S)



P2W involvement in F&S collisions is higher than their average mode share

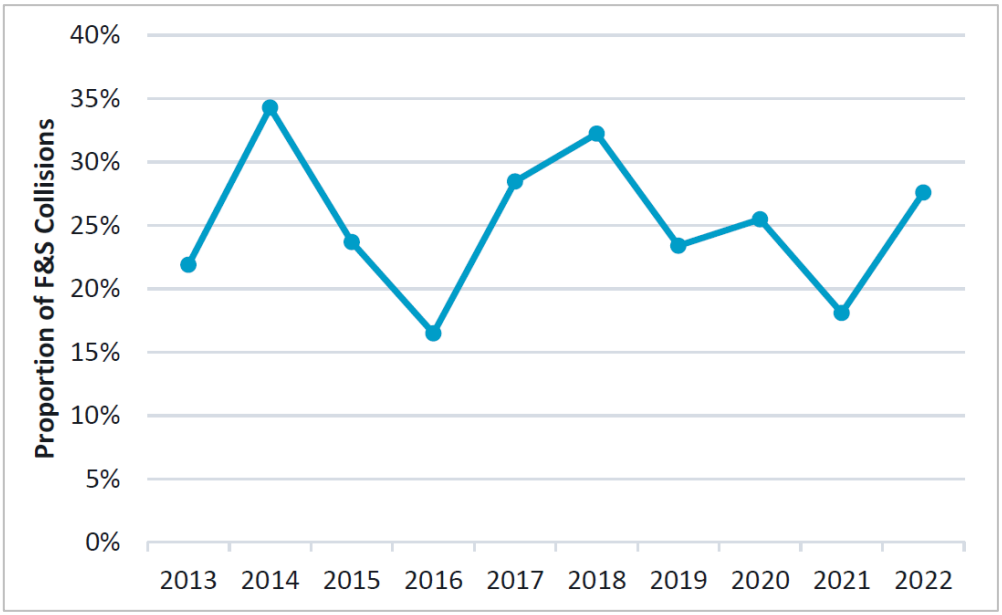
P2Ws were typically involved in about 20-30 percent of total F&S collisions during the 2013-2022 period. Their involvement was highest in 2014 and 2018, when P2W F&S

[7] Official data for 2023 was not available at the time of this analysis, so the most recent year included for the collision data analysis is 2022.

[8] Fatal and Serious (F&S) Collisions here refer to collisions that resulted in a killed or seriously injured casualty.

collisions were nearly a third of total F&S collisions (as shown below). Mode share data collected through an annual screenline survey[9] in Camden from 2013 to 2022 (except 2020, when data was not collected) shows that P2Ws comprise about 5.8 percent of all vehicles on the road. Their mode share would reduce further if pedestrian traffic were included. For example, when walking trips are included, P2Ws account for less than 0.5 percent of trips in London.[10] This shows that P2Ws are involved in a disproportionately higher number of fatal and serious collisions relative to their mode share.

Figure 4: Proportion of F&S P2W collisions of all P2W collisions in Camden



3 pm to 8 pm saw a relatively higher number of collisions

P2W collisions were observed to be the highest during the afternoon/ evening hours of 3 pm – 8 pm, when collisions were more than twice the average across all hours. 7 pm to 8 pm was the worst performing period. The peak in collisions during evening hours can somewhat be explained by relatively higher motorcycle traffic levels from 3 pm to 8pm. A greater number of motorcycles on the road would likely increase the probability of a collision during this period. Data collected from traffic sensors in Camden shows that motorcycle traffic during the 3pm – 8 pm window is 75 percent higher than average (over the 24-hour period); however, P2W collisions during this period are more than twice the average.[11] This means that, accounting for the increase in motorcycle traffic, P2W collisions are unusually high during this period. Lack of lighting or darkness doesn't seem to be a significant contributory factor as they comprise a small proportion of collisions

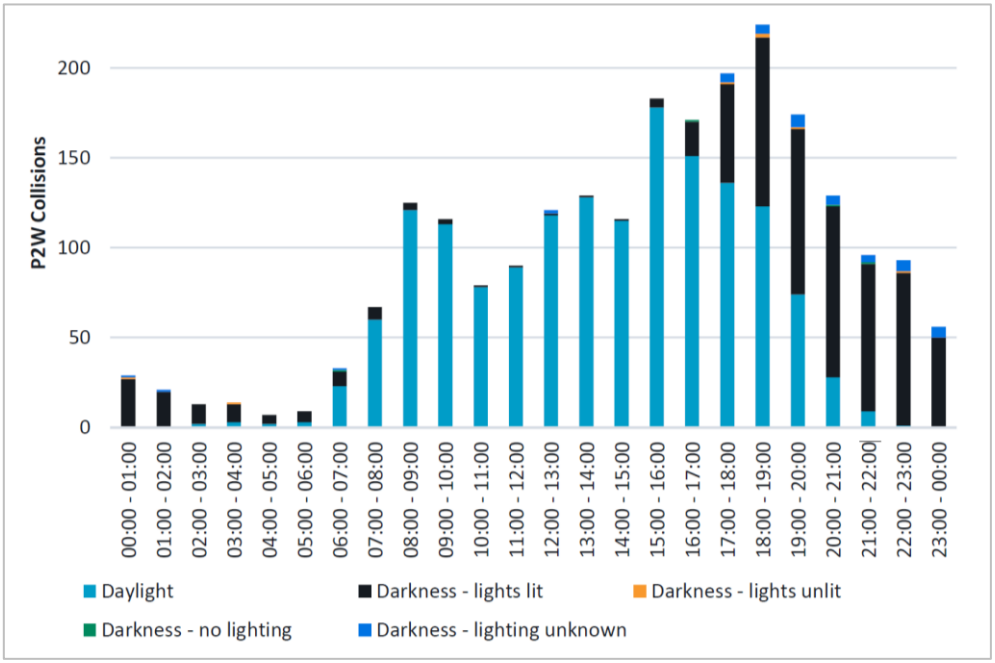
[9] Screenline survey is not a perfect indicator of vehicle mode share (excludes walking) as it can only provide us 12-hour counts from 7 am – 7 pm. The data is recorded across 62 locations across the borough, primarily on roads where motor traffic flows can be captured; however, it the best available indicator of vehicle mode share in Camden.

[10] London Travel Demand Survey 2023, Transport for London

[11] Data collected through Vivacity sensors is not a perfect indicator of hourly changes in traffic levels in Camden as these sensors are not strategically placed to collect representative traffic data across the borough. This is, however, the best indicator of traffic level changes in Camden across the 24-hour period.

factors during these hours as shown the graph below. We would need further investigation to identify the potential causes for this trend and any further actions that may arise accordingly.

Figure 5: P2W collisions in Camden (2013 – 2022) by time of day and lighting conditions



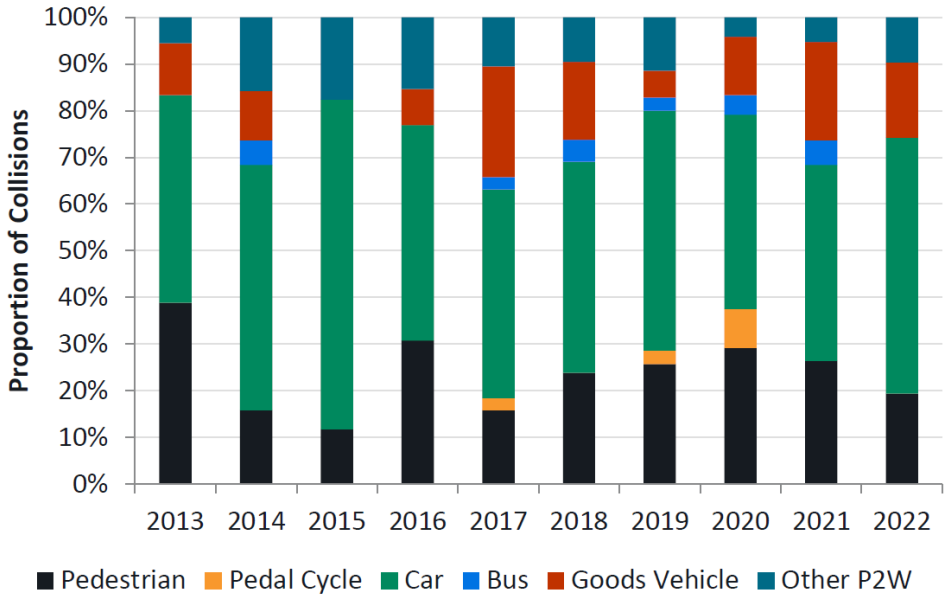
Cars are most involved in P2W collisions followed by pedestrians

As seen below, P2W-car collision pair is the most predominant as compared to other collision interactions. While mode share differences can help explain this skew to some extent, this pattern remains true relative to the existing mode share of cars.[12] The involvement of cars with P2W collisions was the highest in 2015. Although there was a decrease during the pandemic years (2020 and 2021), their involvement increased again in 2022. This remains true when P2W collisions are assessed against their mode share. Pedestrians are the second most involved mode in P2W collisions with highest involvement observed during 2013. "P2W—pedestrian" collisions (or collisions where P2Ws and pedestrians are involved) have varied significantly over the last 10 years. "P2W—goods vehicle" collisions were the lowest during 2015, 2016, and then in 2019. "P2W—pedal cycle" collisions were the highest during 2020. It is possibly because many people took to cycling during the pandemic; London-wide data available from TfL estimates that cycling trips increased by 28 percent between 2019 and 2020.[13] "P2W—P2W" collisions have also varied through the years.

[12] Camden's screenline data from 2013 to 2022 shows that the mode share of cars (excluding pedestrians) varied between 44% and 50%. This would reduce further when walking trips are included. The involvement of cars in P2W collisions varied between 42% and 71%. This means that involvement of cars was high relative to their mode share.

[13] Travel in London 2023, TfL

Figure 6: Collision interaction of P2Ws with other modes in Camden (as a % of P2W collisions)

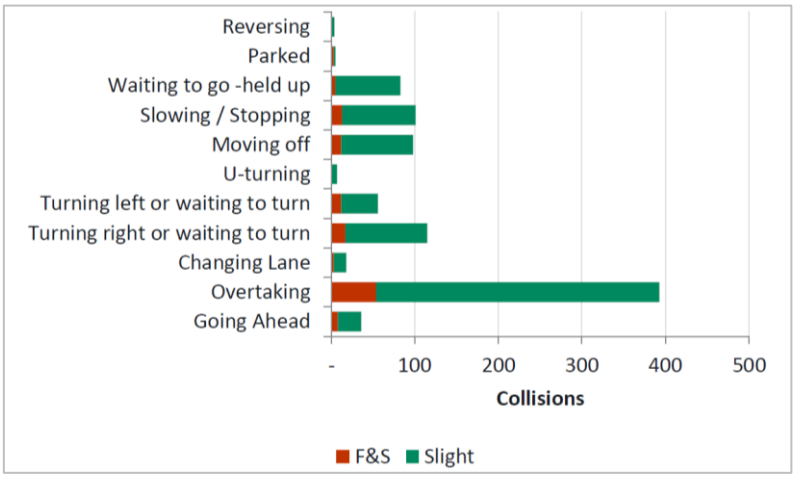


Collisions while a P2W was "overtaking" was the most common followed by while "turning right"

When analysing the specific manoeuvre type that P2Ws were involved in at the time of the collision, it was observed that a significantly large number of collisions happened while a P2W was overtaking.[14] Overtaking collisions, however, have been falling since their high in 2014. This is true for all kinds of collisions— whether slight or resulting in a KSI. This was followed by other manoeuvre types such as while turning right or waiting to turn right, and while slowing or stopping. 60 percent of all collisions involving parked P2Ws and 21-22 percent of all collisions involving P2Ws 'going ahead' or 'turning left' resulted in a fatal or serious injury (KSI). These manoeuvre types were riskier, resulting in a KSI, as compared to other types.

[14] DfT recognises 18 standard manoeuvre types in its STATS19 Road Accident Injury Statistics Report Form. "Parked" manoeuvre type includes all vehicles that are stopped or stationary (whether with or without a rider).

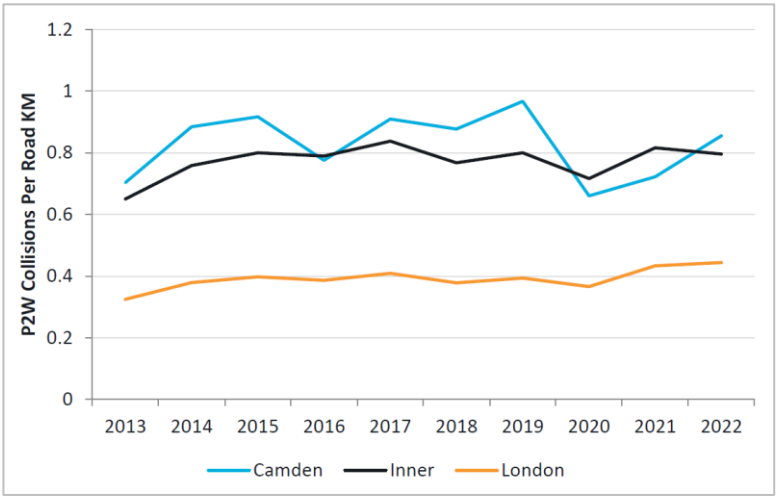
Figure 7: Common manoeuvre types of P2Ws during collisions (2013-2022)



Collisions per km is higher than London average, but close to what has been observed across inner London. P2W KSIs in Camden are below average observed for inner London.

Given variations in borough sizes and total road network, P2W collisions per km can serve as an indicator that allows for comparison with other boroughs and London as a whole. Comparing P2W collisions per km shows that Camden performs less well as compared to London overall but performs very close to other inner boroughs. The gap between Camden and inner boroughs for P2W collisions per km was highest during 2019 followed by improvements during the pandemic. This measure is still imperfect as it doesn't include differences in traffic levels, population density, or other factors which can drive differences in collisions. When we analyse P2W KSIs (per billion vehicle kms), recent 5-year data from 2018 to 2022 indicates that Camden performs better than many other inner boroughs, albeit broadly tracking the inner London average.

Figure 8: P2W collisions (per km) in Camden, Inner London, and London

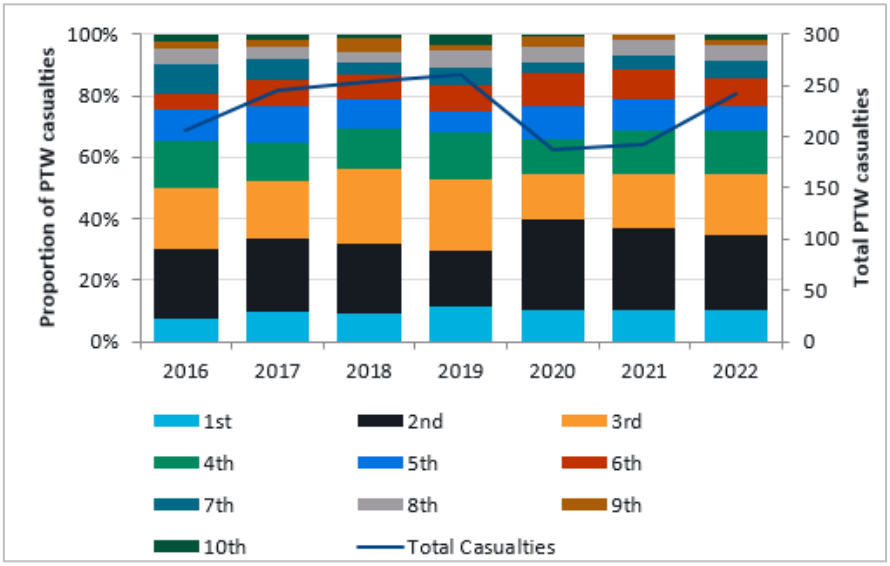


Inner Borough	P2W KSIs/ billion vehicle kms (2018 -2022)
Lambeth	419
Islington	359
Hackney	352
City of London	338
Wandsworth	326
Westminster	317
Southwark	309
Kensington and Chelsea	284
Hammersmith and Fulham	283
Camden	**276**
Tower Hamlets	233
Lewisham	212
Greenwich	119
Inner London Average	**294**

Lowest income deciles most impacted by collisions.

P2W casualties are disproportionately from the lower Index of Multiple Deprivation (IMD) deciles. The lower the IMD decile, the higher the deprivation. Casualties from IMD deciles 1 to 4 (most deprived) comprised more than 60 percent of the total P2W casualties and around 55 percent of all casualties (all modes). It shows that lower income deciles are generally more impacted by all types of collisions but especially P2W collisions.

Figure 9: Proportion of P2W casualties in Camden by IMD deciles (2016-2022)



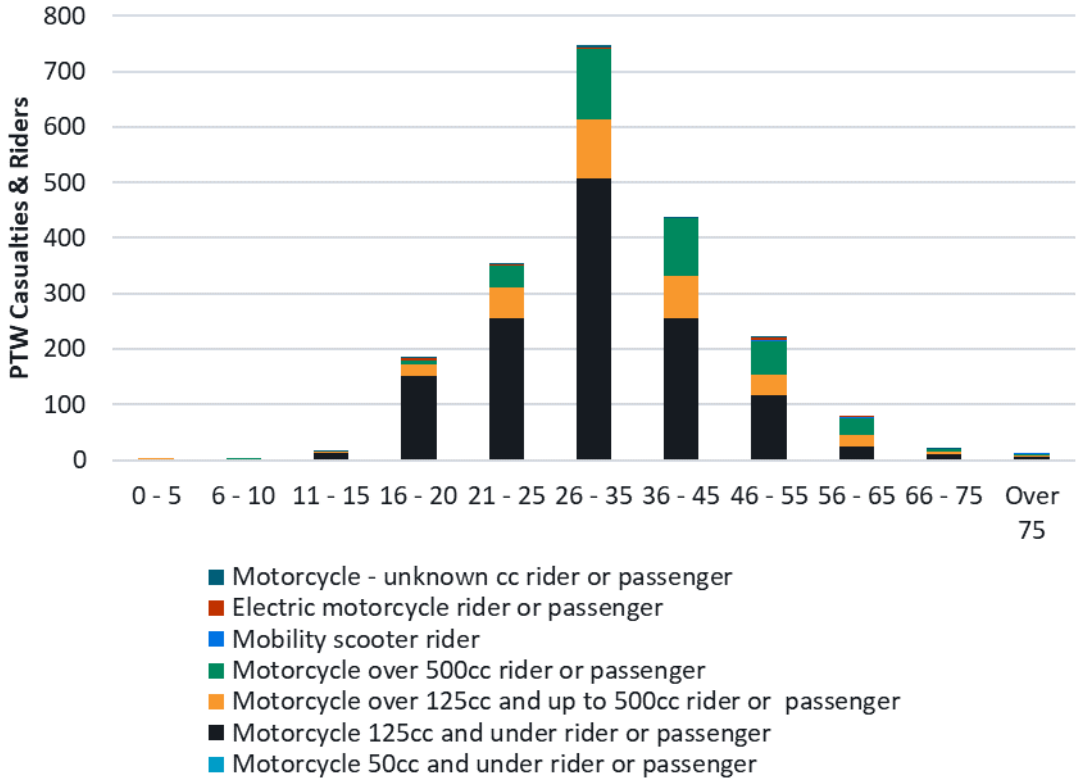
Young adults are most impacted by P2W collisions, mainly while riding P2Ws with smaller engine sizes.

Young people and adults between ages 21 and 45 are most impacted in P2W collisions with about 82 percent of all casualties belonging to this age group. Specifically, young adults aged between 26 and 35 years are the most impacted. This will likely represent the proportionate age profile of motorcycle riders in Camden. UK-wide data indicates that about 60 percent of motorcyclists are in the age group of 21-50 years.[15] The majority of P2W casualties, across all age groups, were riding while on a vehicle with 50cc-125cc engine capacity. This, again, will likely represent the predominant types of motorcycles/ P2Ws seen on Camden roads. After vehicles with 50cc-125cc engine capacity, vehicles with engine capacity

[15] National Travel Survey, Department for Transport Statistics, 2024

above 500cc were the most driven by P2W casualties at the time of collision. Since 2018, there has been a noticeable increase in P2W casualties riding electric motorcycles, reflecting the increase in usage of these vehicles.

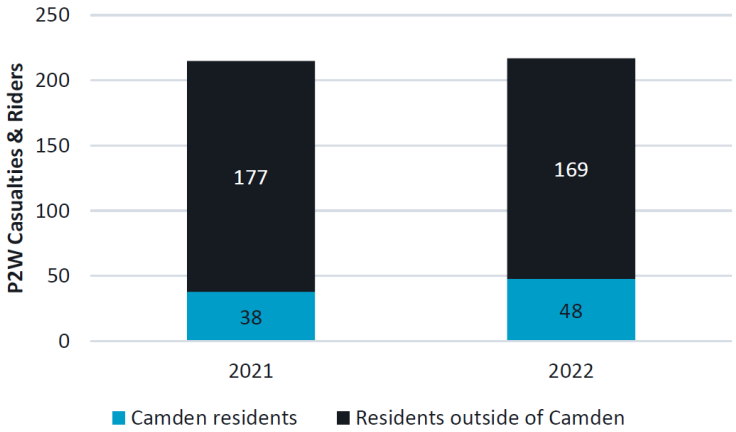
Figure 10: PTW casualties in Camden by age and engine capacity



Most P2W casualties are residents outside of Camden

In 2022, 78 percent of P2W casualties were residents from outside of Camden. This is likely indicative of the fact that Camden, as an inner borough, sees a lot of through-traffic with relatively few trips originating in the borough.

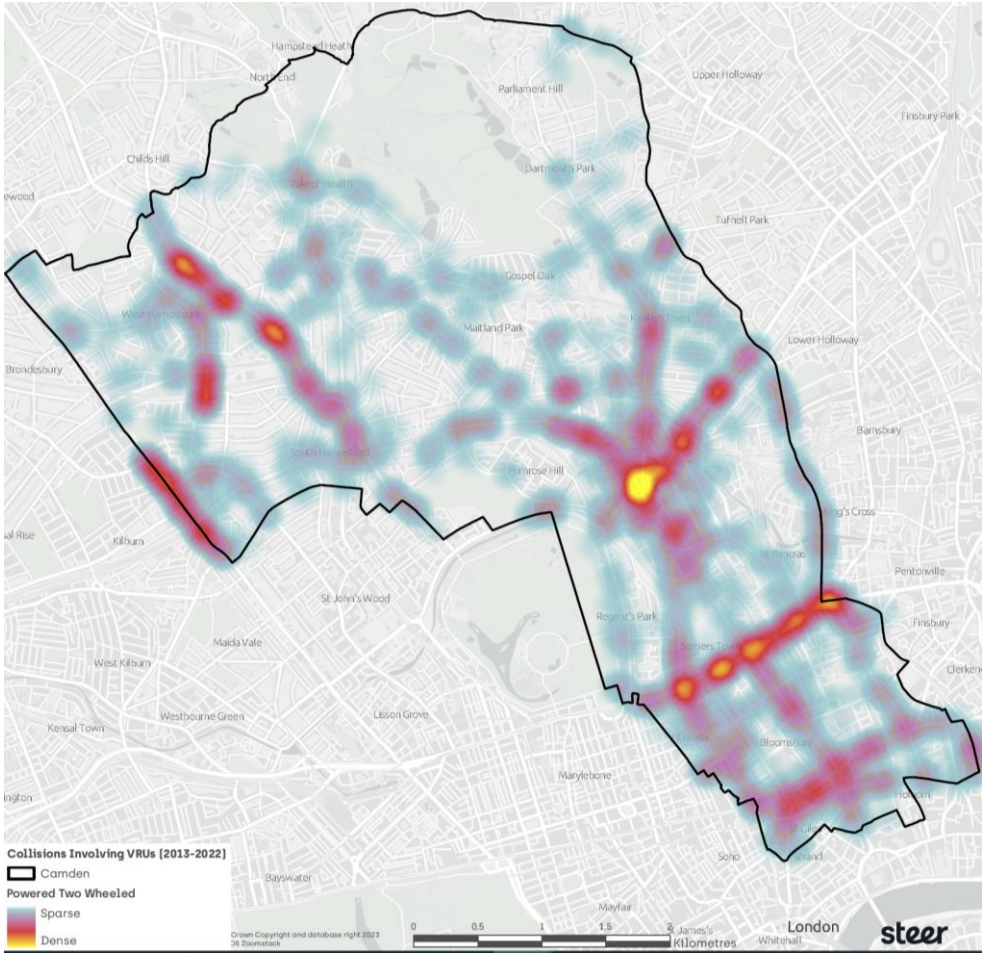
Figure 11: P2W casualties— Camden residents vs other



P2W collisions are largely concentrated around major roads

Finchley Road, Euston Road, Theobalds Road, New Oxford Street, High Holborn, Kentish Town Road, Camden Road and the southern part of Kilburn High Road experience a high number of P2W collisions. Roads on the TfL Road Network (Finchley Road and Euston Road, and Camden Road) are overrepresented when we assess the density of P2W collisions over the last 10 years (although this may be proportional given the high traffic volumes on those main road corridors) . Figure 12 below shows the locations of P2W collisions from 2013 to 2022.

Figure 12: P2W Collision Hotspots (2013-2022)



Summary

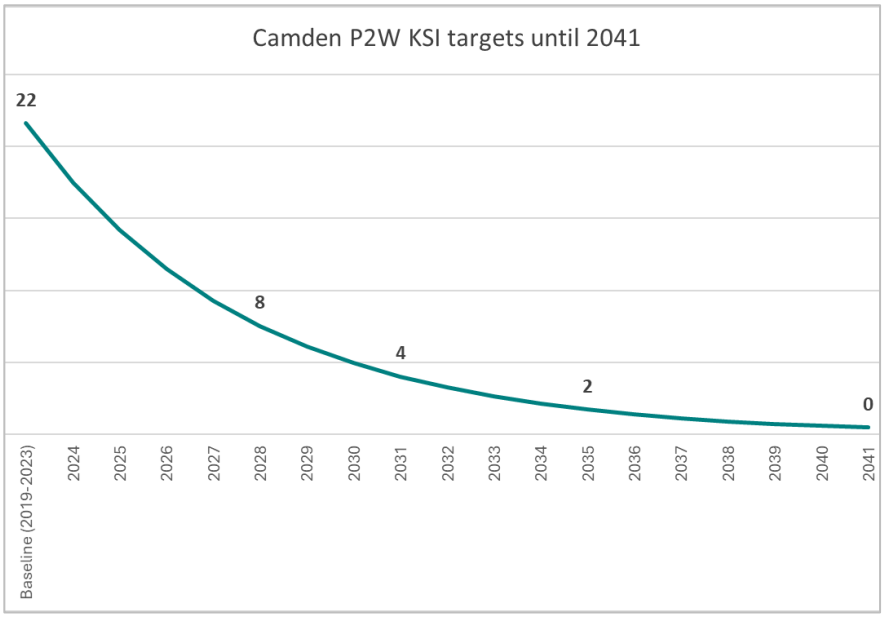
Motorcycle trips, overall, in Inner London have decreased in the last decade. Between 2011/12 and 2022/23, motorcycle trips are estimated to have decreased by 6 percent annually on an average compared to all trips, which decreased by 0.5 percent.[16] Camden's own screenline data, which captures traffic flows from 7 am to 7 pm, shows that P2W mode share (ie percentage of traffic volumes) has remained consistent over the last 10 years in the borough (around 6% of all traffic flows).

[16] London Travel Demand Survey 2023

Collision data from the last 10-year period (2013-22) indicates that motorcycle KSIs have varied between 12 and 40 per annum in Camden with the largest spikes observed during (2016 – 2018) and (2021 – 2022). Although latest figures from 2023 indicate P2W collisions are reducing, more needs to be done to maintain a consistent downward trend of P2W KSIs. While more data is needed to understand the specific risks related to P2W collisions, the analysis and insights presented above offers a starting point for developing the recommended actions presented in the section below.

Next Steps

The following are some of the key next steps that follow the analysis and insights on P2W collisions in Camden:

Next Steps	Detail
Develop interim targets for P2W KSI reduction for meeting Vision Zero by 2041 within the CTS Delivery Plan 2025-28	To be on track to achieve Vision Zero by 2041, we have developed interim targets for reducing P2W KSIs from a baseline of 22 (average of KSIs in 2019-2023) to less than **8 by 2028**, less than **4 by 2031**, and **0 by 2041**. Progress toward these targets, as well as measures to reduce P2W KSIs, will be monitored and published through the annual review reports on the delivery of the Camden Transport Strategy. 
Offer safety training and behaviour change programmes for P2W riders in collaboration with TfL and other boroughs	P2W collisions disproportionately involve young adults aged 26 to 35 years (even as we account for variations in P2W licenses across different age groups). This points to a need to help provide additional skills among new/young riders potentially through effective training programmes. We will explore potential to increase uptake of TfL motorcycle training programmes and support with funding to offer this training to interested riders. Collaboration with TfL and other central London boroughs will be key for this action

Next Steps	Detail
	given the proportion of P2W riders who travel through Camden from outside the Borough.
Gather more data and insights on P2W rider profiles and trip patterns in Camden	About 78 percent of P2W KSIs in Camden involve residents from outside of Camden. It would be key to understand motorcycle trips in the Borough (origins and destinations), motorcycle traffic flows during different times of the day, journey purposes, and profiles of P2W riders. We aim to gather more information in this regard to accurately target safety training and behaviour change programmes and any other appropriate measures.
Consider and advance a London-wide approach to explore risks faced by delivery riders	P2W trips catering to online deliveries are increasing in number in Camden and, more broadly, in London. There is an opportunity to influence safe rider behaviour at scale by establishing a dialogue with delivery companies. As this wider opportunity is also recognised by other inner London boroughs, we will work with central London/ sub-regional partnerships (e.g. via Cross River Partnership) to advance a joint approach to better understand and address the risks faced by delivery riders.
Plan and undertake infrastructure measures to address P2W collision hotspots	P2W KSIs over the last 10 years have been mapped to identify Camden roads with the greatest number of collisions. Camden Town, Euston Road, Finchley Road, Camden Road, and Kilburn High Road experienced a relatively high number of P2W collisions. • As part of the forthcoming 3-year plan (2025-28), we will work closely with TfL to deliver road safety improvements on the Red Route network at several junctions on Euston Road/Kings Cross gyratory and other identified parts of the TLRN, including potentially junctions on the Finchley Road. We will also work with TfL to extend bus lane provision on both the TLRN section of Camden Street and (parts of) Camden Road. It is noted that TfL permit P2Ws to use bus lanes on the TLRN • Through the "Better, Safer Kilburn" High Street schemes we will deliver improvements that are expected to be of benefit in terms of road safety to all vulnerable road users along Kilburn High Road, subject to the outcome of the consultation. • Through the ongoing "Healthy Neighbourhoods" scheme in the Camden Town Area, we will explore measures to improve safety for all vulnerable road users, including P2Ws, at key junctions in the area (including reducing the risk of collisions arising from turning movements).
Continue to engage with representatives of P2W groups to	While data on collisions and motorcycle journeys offers a macro perspective on factors impacting safety of P2Ws, it must be supplemented with experiential insights from motorcyclists to drive impactful solutions. To that end, we will continue to engage with

Next Steps	Detail
discuss safety concerns	P2W groups in the borough through quarterly meetings to discuss road safety concerns and consider potential opportunities and actions to address those issues.
Collaborate with TfL to inform any upcoming guidance related to P2W safety and identify opportunities to include such guidance within our future programmes	We will continue to collaborate with TfL to help develop a consistent London-wide approach to P2W safety. To that end, we will continue to contribute to any upcoming guidance or action plans related to P2W safety, such as any updates to the Motorcycle Safety Action Plan and the Urban Motorcycle Design Handbook. We will also identify any relevant actions from such forthcoming guidance for implementation in the next 3 years.

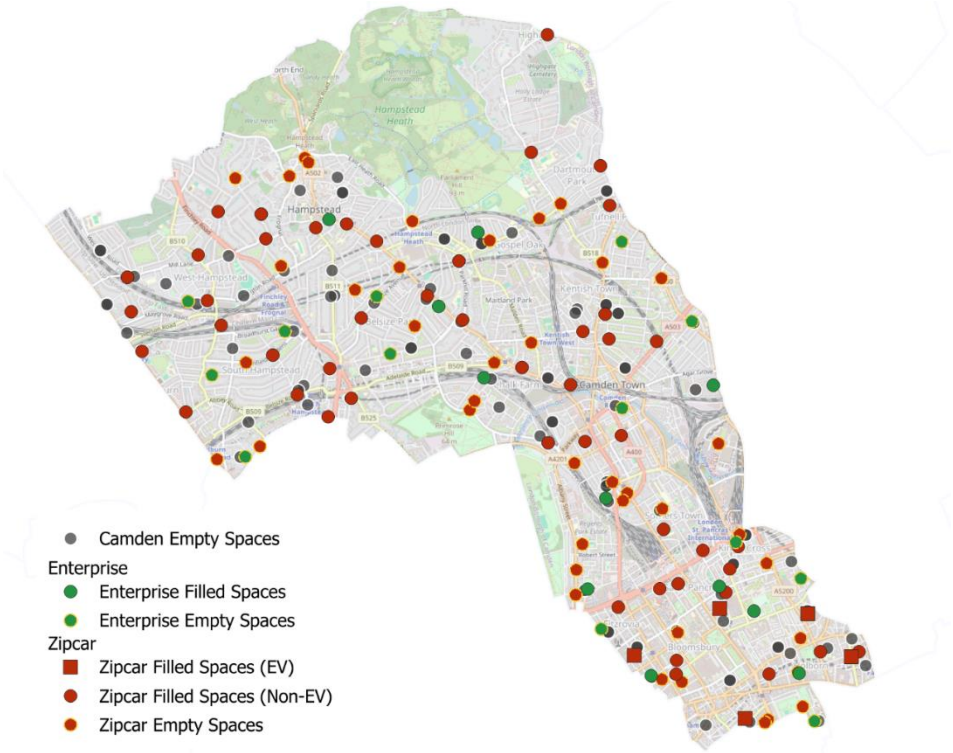
Championing Car Clubs

Background

Car clubs were first established in Camden in 2005. Car clubs enable users to have access to a motor vehicle through a short-term rental (often hourly or daily) and offer an alternative to private vehicle ownership. They play a vital role in reducing car ownership and kerbside parking pressure in the borough and are therefore widely supported in the Camden Transport Strategy (specifically Policy 2f, 2g and 5a) and the Mayors Transport Strategy, as well as delivering on objectives in the Camden Clean Air Action Plan, Climate Action Plan and We Make Camden.

As well as helping people save money (up to £250 per month compared to own a private vehicle), on average each car club vehicle replaces 29 private cars in London (2022), and car club members are more likely than owners of private vehicles to use active and public modes of travel. For example, 37% of members cycle once a week, compared to the national average of 20%. As well as encouraging less overall car usage (on average 138 miles less per car club user), car clubs also help reduce motor traffic emissions by providing vehicles that are either electric or new (under 5 years old) and therefore adhering to high tailpipe emission standards.

Figure 13. Location and distribution of car club locations (spaces), electric club cars and empty spaces (at time of writing)



There are currently two operators in Camden, with Zipcar holding the lion's share of the car club market in Camden, at 80% of available car club vehicles and 95% of car club trips. Enterprise makes up the remainder of the market. Whilst Zipcar operates solely as a car club company in London Enterprise are also a car hire company with depots across the UK, with the car club operation being a part of their overall business model.

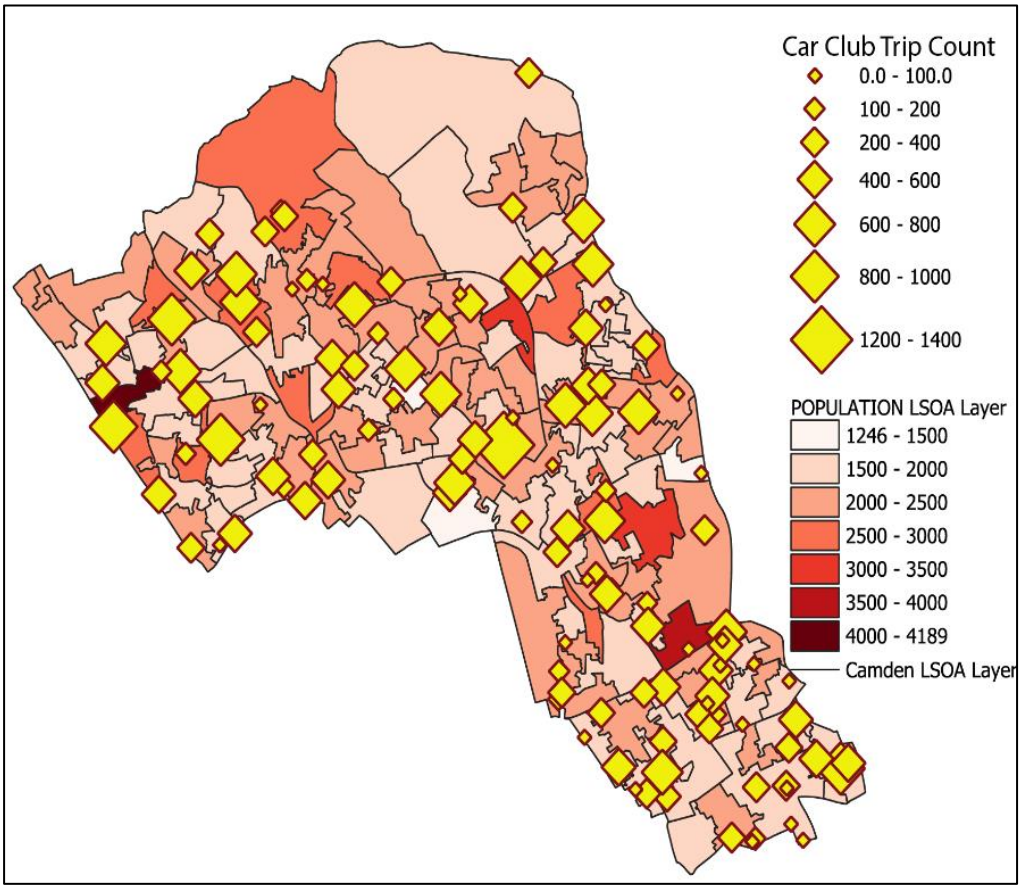
Analysis

Car club membership and use

Membership of car clubs is growing steadily in Camden, with roughly 5% growth year-on-year. Despite this, Camden has fewer active car club members than other similar inner London Boroughs (18% lower) and the number of trips taken is lower than the average of inner London boroughs. However, it is interesting to note that the fewer members within Camden, are in fact more active users than in other boroughs. When comparing trips per member, Camden users average 3.6 trips per member, as compared to 2.9 trips per member in the London Borough average. Interestingly, within Camden there is no obvious correlation between population density in Camden as shown in figure 14.

Camden's Permit2CarClub scheme (providing car club membership deal in exchange for scrapping their on-street residential CPZ permit) has generated 85 new car club members prior to 4 years ago. The scheme has been recently re-established with new membership offers.

Figure 14: Car club usage against population levels



Customer value

As car club bays are exclusively allocated to one car club operator, the process of bay allocation or reallocation, effectively determines which operator is most convenient for each neighbourhood in Camden. It is therefore important that the financial cost to residents is taken into consideration. Comparison of the financial models of both current providers is difficult and can at times be confusing for potential customers to compare, with minutes of time included in one operator's tariff and the other includes mileage leading to different value propositions, depending on user types.

Electric car club use

Camden electric vehicle (EV) utilisation is 11% lower than the inner London average. Furthermore, Camden lags behind other London Boroughs in the provision of charging infrastructure for car club vehicles (7%, compared to 15% across London). A significant uplift in infrastructure provision will be required to contribute to the pan-London target of 50% of the entire fleet being composed of Ultra Low Emission Vehicles (ULEVs) by 2025. Whilst high satisfaction rates (96%) amongst EV car club users suggests that the power source for a car club vehicle is not a barrier to car club uptake, only 4% of car club users currently choose a car club to access electric vehicle provision, and therefore it cannot be viewed as an incentive either.

Camden Council already has an extensive program of Electric Vehicle Charging Point (EVCP) installation, but due to the expense of the infrastructure, it is difficult to keep up with demand. Whilst the implementation of a charging point for a car club bay would be exclusive to one car club vehicle rather than multiple private vehicles, it would however, increase the access to electric vehicles for the wider Camden population. Meanwhile, electric vehicles are more costly for the operator to provide as part of their offering. The decision to install a charging point for a car club bay would therefore need to consider the contract length of EVCP, the longevity of the car club bay location (likelihood of it needing to be moved), and assurances of long-term bay occupation with an EV vehicle.

Car club permitting and contracts

Car club operators in Camden do not have any formal contracts with the Council, making access to data, and assurances regarding bay occupation, more difficult to obtain. Permits for car club bays are renewed on annual basis and now take place on an agreed date to improve efficiencies for the operators.

Camden Council currently only allows the 'back-to-bay' operation, whereby car club vehicles must be returned to the same fixed location. One-way or 'flex' operations are not permitted, as set out in the CTS, to discourage the use of club cars to travel medium distances (5-6km) and potential use of car clubs to drive to attractions particularly in the south of the borough.

Car club bay location and occupation

The distribution of car club bays is fairly even across the borough, but there are notable gaps in provision as shown in figure 15. Pockets of high car club use exists across the borough, The highest use of car club vehicles varies considerably across the borough, but is strongest across the middle band of Camden, from Kilburn, Camden and Kentish Town.

Figure 15: Areas of urbanised Camden not currently within a 500m radius of an existing occupied car club bay

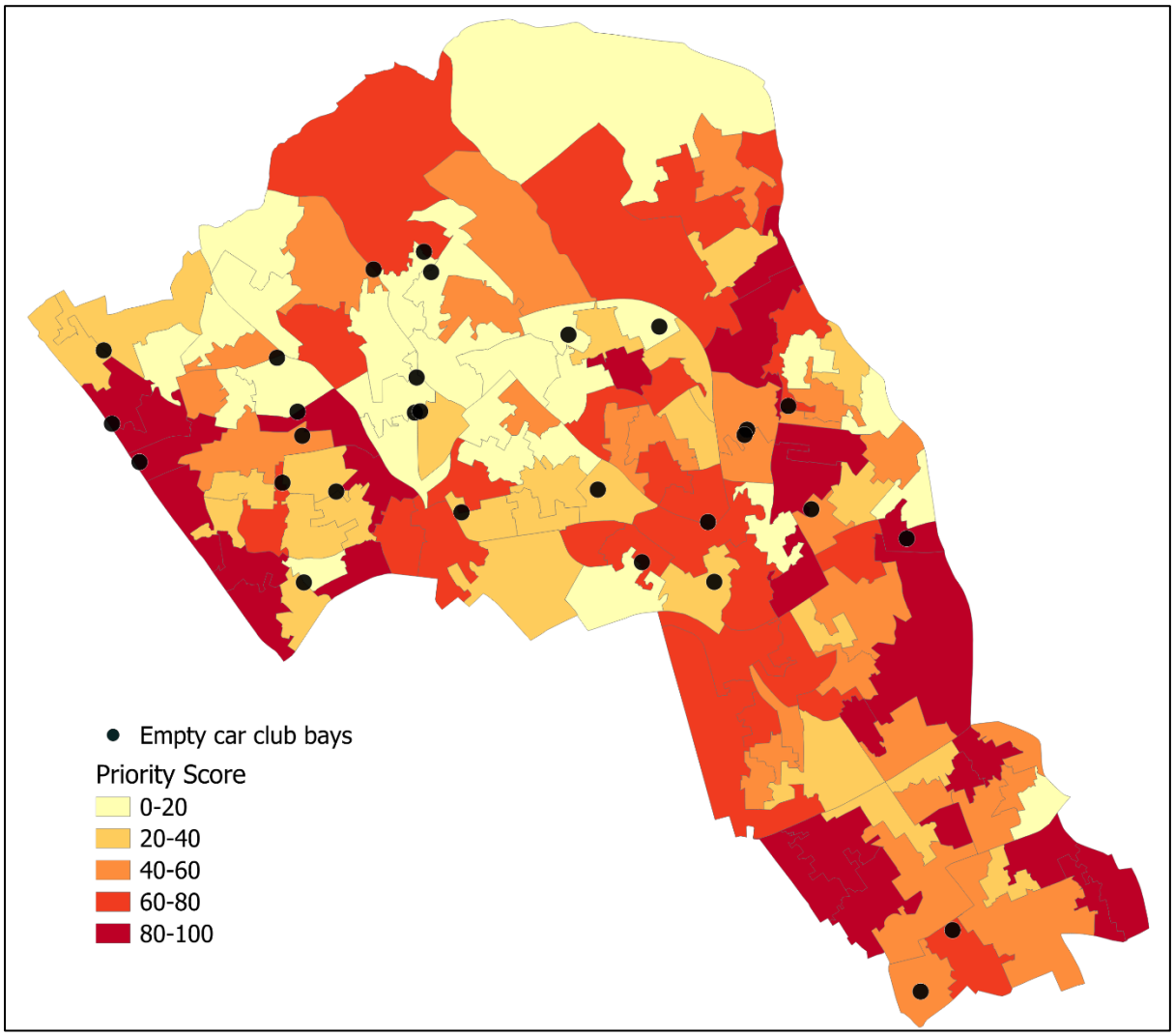
Car club parking space occupation fluctuates every month as vehicles are renewed or replaced, however at the time of this report only 33% (80 of 245) of all car club parking spaces are currently occupied with a vehicle at time of writing, including 50 parking spaces with no permit attached to them. At present, there is no formal process for offering a car club bay to another operator in the absence of an up-to-date licence.

The location of car club bays can change periodically, in response to changes in kerbside demands, such as short/medium-term development construction needs, or long-term transport scheme implementation. However, there is currently no strategic oversight of car club bay locations and relocations, to help identify where car club bays would be best placed to maximise their contribution towards reducing car ownership.

Insights

Whilst it is acknowledged that car clubs contribute significantly to achieving many environmental and social objectives of Camden, and whilst some schemes have been put in place (such as the Permit2CarClub initiative), we have not made sufficient progress in promoting and enabling car club uptake to date. This focus area recommends that we increase our support for car clubs, and explores the opportunities listed below to improve the uptake of car clubs, to reduce first or multiple car ownership in the borough.

Figure 16: Empty car club bay locations compared priority areas. Priority scoring based on high use of car clubs, population density and levels of deprivation



The development of car clubs in Camden has grown organically over 24 years, largely in the absence of strong contractual structures. Short of a full contractual renewal, much can be improved through the development of stronger lines of communication with the operators, clearer terms and conditions, better data sharing processes, easier processes for permitting, and stronger agreements on bay location and occupation.

Take up of the opportunities listed below are largely dependent on the development of ongoing productive working relationships with the car club operators. With shared goals from both the Council and the operators (to improve the usage and viability of car clubs), it is expected that strong progress can be made on these recommendations in the 3-year Delivery Plan timeframe.

Next steps

The recommended next steps are grouped according to the four themes, that being to make car clubs:

- Easy to Reach
- Easy to Use
- Accessible to All
- As green as Possible

These next steps will contribute towards achieving the following ambitions within the lifespan of the 3-year Delivery Plan:

1. Increase active car club membership in Camden to be in line with other inner London boroughs
2. Have at least one occupied car club bay within a 5-minute walk (500m distance) of each household in Camden
3. At least 300 participants in Permit2CarClub schemes over three years
4. Install a minimum of 50 EVCPs at car club bay locations

Next steps	Detail	Implementation
Easy to Reach		
Support car club operators to fill empty car club bays with vehicles	Explore with car club operators, the economic viability of filling their current empty bays with vehicles, using new demand and gap analysis to inform the discussions. Offer unlicenced bays to other providers if not taken up by the incumbent car club provider.	£; Short-term
Improve process of tracking and maintaining car club bay locations	Draw up stronger terms and conditions for car club permits and consider the development of permit incentives for particular locations. Develop a tracking system for car club bay relocations and vehicle occupation to improve user trust and optimise locations for car club bays.	£; Short-term
Support bay expansion through planning development and other	Identify opportunities to expand car club provision through development opportunities, shared-mobility hubs, and new transport schemes. Offer new bays near existing well-used to improve	££; Medium-term

Next steps	Detail	Implementation
complementary initiatives	operational scale and customer reliability. Partner with developers in high priority areas to install new car club vehicles on private land.	
Easy to Use		
Promote car clubs via Council communication channels	Work with council and operators' communication teams to promote car clubs, particularly targeting communities near to bays that are at risk of having cars removed from the bay due to low demand.	£; Short-term
Provide targeted guidance on car club use, cost comparisons and other potential benefits	Communicate via local groups and support networks (e.g. Camden's Digital Support Bus), to provide cost comparisons (including CoMoUK's Travel Better Tool), answers on how the system works, or worries about fines.	£; Short-term
Accessible to All		
Provide targeted offers for businesses to increase use of car clubs	Develop targeted offers for businesses to try car clubs (e.g. Permit2CarClub scheme) and promote through business newsletters and BID communication channels and in conjunction with Camden's Inclusive Economy team.	££; Short-term
Expand the use of targeted offers for residents in connection with other schemes	Provide targeted offers to residents in conjunction with healthy street initiatives, like the existing Permit2CarClub scheme. Target residents surrounding new or 'at risk' car club bays or development offers to new residents.	££; Short-term
Support the development of mobility credit schemes to include car club membership	Look to develop a mobility credit scheme which includes a package of shared travel options including car club membership, cycle hangar access and shared micro-mobility options	£££; Long-term
As Green as Possible		
Incentivise car club operators to provide zero-emission cars and car club members to use them	Enhance the incentives for electric car club permits. Promote the use of apps like Zap-Map or A Better Route Planner to car club users, to assist in estimating battery percentage for a journey and planning trips.	£; Short-term

Next steps	Detail	Implementation
Install EV charge points in well-used car club bays	Facilitate the installation of more EV charge points for car club bays.	££; Medium-term

Better Buses in Camden

Background

Buses play an important role in achieving the vision of the CTS to transform transport and mobility in Camden to enable and encourage people to travel sustainably, nurture healthier lifestyles, create radically less polluted places and meet the needs of the borough. As such, the CTS contains several bus related policies / measures as set out below:

- **Policy 3e:** Deliver bus priority improvements across the Borough and support the provision of on-demand bus services (particularly in the north of the borough), which are of benefit to those otherwise excluded from such networks.
- **Policy 3g:** Lobby TfL to ensure that they maintain a bus service that provides a good level of frequency and accessibility to our residents, recognising the role of buses as the most accessible part of our public transport system.
- **Policy 6b:** Improve provision and priority for buses to minimise delays to bus journey times and encourage a shift to public transport.
- **Investment Priority 5a:** Lobby TfL to upgrade bus fleets operating in Camden to maximise emissions reductions.

TfL manage London bus operations across the capital, including the main fleets of buses operating in Camden. To deliver the policy goals listed here, and those of TfL's Bus Action Plan (2022)[17], this focus area sets out the current state of bus provision and use in Camden, identifies the

[17] The TfL Bus Action Plan (2022) aims to ensure bus services are safe and easy to use, efficient and contribute to tackling the climate emergency by offering a zero-carbon travel option.

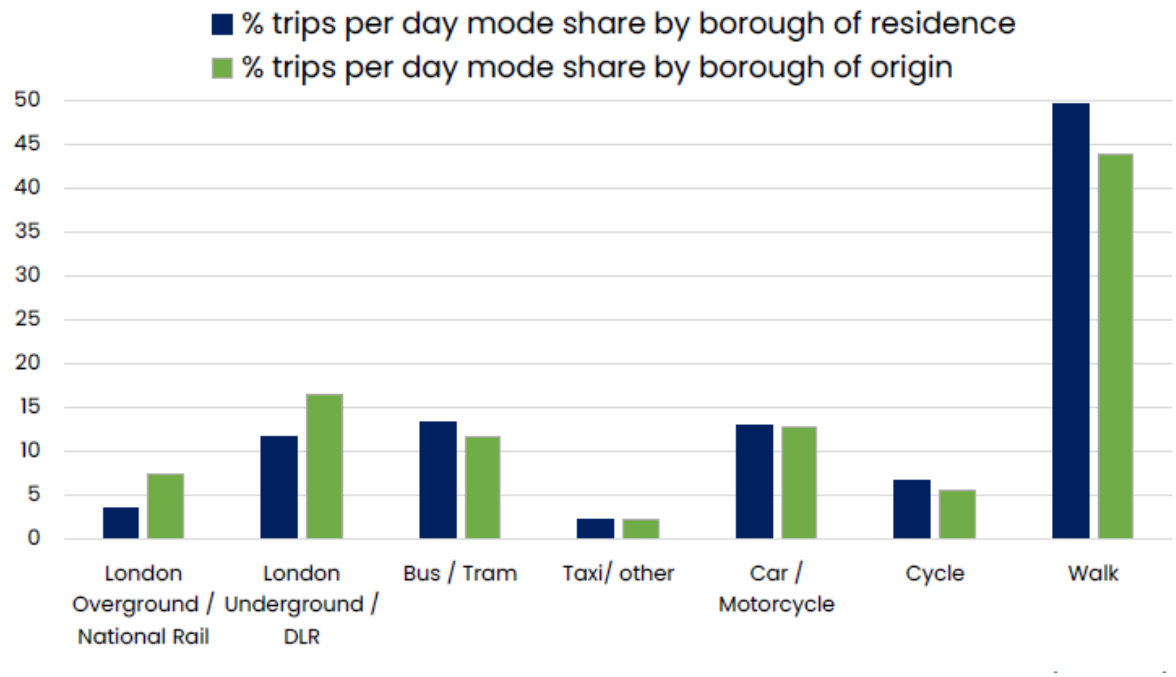
challenges and opportunities for improving and promoting bus services, and outlines the next steps that Camden will explore over the next three years to improve the experience of buses for those living, working and visiting Camden.

Camden Bus Network Overview and Insights

Overview

Buses play a significant role in travel in Camden with over 170,000 daily trips. Their usage accounts for 13.4% of daily trips by Camden residents and 11.7% of all trips that originated in Camden.[18] For trips by borough of residence, buses are the second most used mode after walking.

Figure 17: Daily trip mode share in Camden by borough of residence and origin (2022-23)



Camden has 453 bus stops (all of which are accessible except 1) and 82 bus routes, which cover a total of 420km.[19] There are 15km of bus lanes in the borough and about

[18] Daily trip mode share data from LTDS is available as a percentage of two types of trips:
(a) % of trips by "borough of residence," which is a percentage of total trips by Camden residents
(b) % of trips by "borough of origin," which is a percentage of total trips that originated in Camden

[19] To be classified as accessible, and meet statutory guidance, a stop must have among other things:

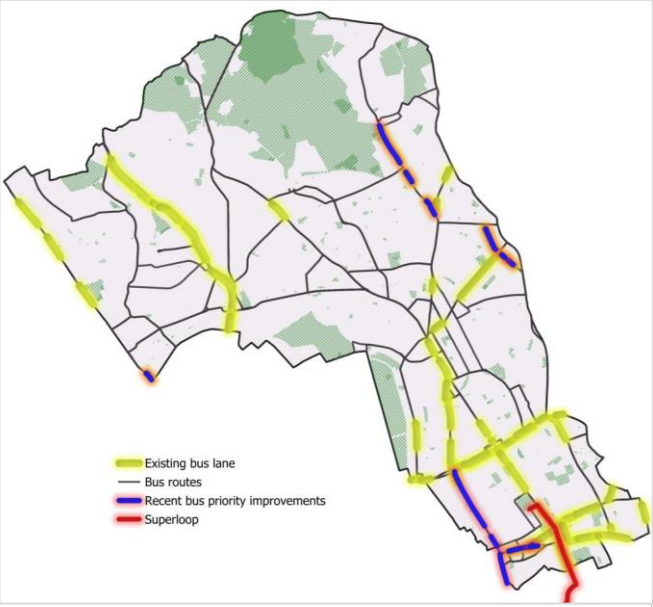
- A suitable kerb height to enable access for mobility impaired persons (in combination with low-floor bus equipped with access ramp)
- Clearway markings and time plates to prevent obstructive parking and enable buses to manoeuvre close to the kerb
- Removal of footway obstructions at the boarding and alighting areas.

32% of bus routes in the borough have bus priority.[20] The Figures 17 and 18 below show the network of bus routes and bus stops in the borough.

While bus stops are well distributed across areas of different index of multiple deprivation (IMD), there are some deprived areas that have gaps in bus stop service, including around Kilburn and Somers Town.[21]Areas in the south of the borough are comparatively better serviced, both in kilometres of service and bus routes, than areas in the north. The north of the borough also experiences a lack of orbital bus routes that can cut journey times for passengers wanting to connect to outer areas of the London. While orbital bus routes 210, 310, and C11 serve the north of the borough, providing east-west links, there have been many demands from residents and other stakeholders for more and better services. This includes, for example, serving the longstanding public demand for extending timings and frequency of bus route 603.

While we understand that TfL has previously considered options for expanding 603 and has not found any business case for it, Camden will continue to lobby for the expansion of this route and represent the demands of stakeholders in the borough. The current constrained funding environment within which TfL is operating is also recognised as making additional bus investments challenging. Camden will work with TfL to explore options to support network and other improvements.

Figure 18: Overview of bus network in Camden



Bus network in Camden

Bus stops in Camden

[20] Healthy Streets Scorecard, 2024

[21] IMD is calculated with considerations for income, employment, education, health, crime, barriers to housing and services, and the living environment

Benchmarking

Benchmarking of Camden's bus performance against the average inner London bus performance shows that Camden is performing well in its bus mode share, the number of high frequency routes and bus stops with countdown. However, performance is relatively poor in the areas of bus speeds, post pandemic bus patronage recovery (both weekday and weekend) and provision of bus routes. Further details are set out below:

Figure 19: Bus Performance Benchmarking

Bus performance parameter	Camden	Inner London Average
Bus Speeds (2023/24)	**7.2 mph**	**8.1 mph**
Post-Pandemic Demand Recovery on Weekday (demand in 2022/23 P09 compared to 2019/20 P09)	**74%**	**82%**
Post-Pandemic Demand Recovery on Weekend (demand in 2022/23 P09 compared to 2019/20 P09)	**84%**	**90%**
Average weekday scheduled bus kilometres per square kilometres of area	**1,524 km/km^2**	**2,031 km/km^2**
Provision of bus routes (kilometres of bus routes per area of the borough in square kilometres)	**19 km/km^2** (Ranked 10th)	**24 km/km^2**
Excess Waiting Time (2024 Q4)	**1.2 minutes**	**1.2 minutes**
Number of bus stops	**453**	**447**
Bus-Only PTAL	**3**	**3**
Bus Mode Share (2022)	**13.40%**	**12%** (All London boroughs)
High Frequency Routes	**56**	**41.9**
Bus stops with countdowns	**22%**	**20%**

better than avg. on par with avg. worse than avg.

The level of bus route electrification in Camden is also low in comparison to bus routes in all of London. Although TfL plans to introduce electric buses on 7 other routes in Camden within the next 12- 18 months, at present only 6% of Camden's bus routes (3) are fully electric compared to 19% when all London bus routes are considered.

Using bus performance data of speeds and excess waiting times, a set of bus routes have been identified which would benefit the most from bus priority improvements.[22] A list of all these sections is available in the table below, including which ones are on the TfL network and Camden roads as well as links to planned projects where relevant.

[22] Bus priority measures can support bus punctuality and reliability in areas where there are higher traffic volumes and buses cannot run as freely.

Roads with low performance bus	Operator	Routes benefitted	Proposed Camden projects
Chalk Farm Road/Camden High Street (between Parkway and Ferdinand Street)	Camden	N28, 1, 31, N31, N5	Parkway and Kentish Town bus priority schemes
Ferdinand Street	Camden	24	
Malden Road	Camden	24, 46	
Avenue Road	TfL	31, N31, 603, 268, N113, 113, 46, C11, 13, 187	Better Bus Partnership Swiss Cottage gyratory feasibility
Camden Street	TfL	46	Bus lane (preliminary discussions)
Camden Road	TfL	29, N29, N253, N279, 274, 253	Eastbound bus lane (preliminary discussions)

Figure 20: Areas of focus for bus priority

Engagement

As part of his review, a workshop was conducted with TfL to discuss challenges with bus performance in Camden and opportunities to address them. Several ideas and proposals originating from this workshop were considered for the development of this analysis. Further input was obtained from TfL before finalising this "focus area" report. Key highlights are mentioned below.

- TfL have plans to improve bus accessibility both in terms of infrastructure and customer focus e.g improved waiting environment, messaging and real time information at stops and through apps.
- Route studies undertaken by TfL could provide insight on specific bus routes and be used to identify potential improvements in various areas including bus speeds and patronage.
- More collaborative working with internal council teams is needed to explore opportunities to promote and improve bus travel, for example exploring developer funding opportunities such as S106 and travel plan incentives.
- Better oversight of TfL's long-term plans would allow the borough to align its own bus priority projects with them.
- Wherever feasible, Camden will explore supporting TfL's bus operations in the borough, for example, maintaining suitable bus stand provison and supporting driver changeover points, driver welfare facilities, and bus stop cages/ clearways.

Next Steps

The following are some of the key recommendations/ next steps that follow the analysis and insights on buses in Camden:

Category	Detail	Lead Organisation
Bus Access		
Bus shelter improvements	Install additional shelters and covered seating where feasible and not already in place, prioritising most-used stops. *Next step: Review the current provision of shelters at stops throughout Camden and request boarder data from TfL to identify most-used bus stops*	Camden & TfL
Bus announcements	Investigate the potential to add audible bus announcements at bus stops to support blind and partially sighted bus users while using bus stop bypasses and Shared Use Bus Boarded (SUBBs), prioritising the most-used bus stops as above. *Next step: Review insights from trial on Route 63 from TfL and based on feedback, identify other routes to roll-out the real-time information signs and announcements.*	TfL
Micro-mobility hubs	Review opportunities at the busiest interchanges for shared mobility hubs, including new cycle docking stations, car club bays, and road and kerbside improvements to prioritise and promote buses. *Next steps include:* • *Survey the busiest bus interchanges in the borough to catalogue existing provision of shared transport options and measures to enhance interchange provision.*	Camden
Electric Vehicles		
Conversion to zero-emission vehicles	Given the low rate of zero emission bus routes in Camden, relative to the rate for London as a whole, lobby TfL for conversion of more bus routes to zero-emissions in Camden. *Next step:* • *Review funding opportunities to support TfL in the electrification of buses in Camden and lobby for more routes to become zero emissions* • *Support TfL to future proof relevant bus stands to help the delivery of zero-emission bus fleet*	Camden & TfL
Bus priority measures		
Expansion of real-time information	Collaborate with TfL on expanding real-time information services for bus users. Establish a baseline of current real-time information	TfL

Category	Detail	Lead Organisation
	availability (e.g. countdown signs or similar), which is currently at 22%, and set a target to increase this coverage to 30% within the next three years. *Next steps include:* • *Request location of bus stops that do not have real-time countdowns from TfL and prioritise based on number of boarders, routes with high excess wait times, and proximity to other key services like transport interchanges.*	
Build on Bus Priority programme	• Conduct a review, in conjunction with TfL, to identify issues and potential solutions for routes with high excess wait times and low bus speeds. Prioritise routes with high excess wait times and low bus speeds that operate the longest distances in the borough such as Route 24, 46, 274 and C11 • Support TfL in signal priority reviews in Camden with a focus on delivering improved bus speeds on both the TLRN and Camden highways. • Gather bus driver and operator insight on current route issues, problem areas and possible solutions. • Review roads where bus lanes could be extended (in both time and length) or added including on), Camden Road, and the eastern end of Parkway • Conduct a high-level feasibility study on potential new bus gates and bus/cycle-only streets. Integrate kerbside management and parking rationalization into bus priority measures. • Continue to implement the Bus Sense programme to streamline bus operations and improve reliability.	Camden & TfL
Bus stop consolidation	Review opportunities where bus stops in very close proximity to each other could be consolidated to improve bus journey times while preserving interchange points. *Next steps include:* • *Collect and review data on bus stop boardings and distance between bus stops on routes to identify bus stops with low*	Camden

Category	Detail	Lead Organisation
	boarding/alighting numbers that are near other bus stops that can service the area. • *Survey bus drivers and bus operators for insights on underutilised stops.* • *Trialling locations for bus stop consolidation whilst retaining maximum 400m spacing between stops and monitoring outputs from that trial*	
Bus stop relocation	Review opportunities where bus stops could be relocated away from junctions where queuing/turning traffic blocks bus access to bus stops whilst protecting interchange facilities. *Next steps include:* • *Survey bus drivers, TfL and bus operators to identify busy intersections where blockages occurs* • *Conduct spatial mapping of bus stops and proximity to busy intersections*	Camden
Bus stop improvements	Make improvements to and around bus stops to promote ease of access and egress, such as removing parking/loading bays near the bus stop, adding keep clears, and extending bus cages. *Next steps include conducting on-site assessments of bus routes to identify and plan a programme of solutions for bus stops with obstructed access and egress (bus driver insights should be incoporated in this).*	Camden & TfL
Junction review	Undertake review of junctions that are often blocked by traffic or which could be improved to allow for easier movements by buses. Improvements could include removing parking bays, banning or restricting turning movements, and adding yellow box junctions. Prioritise junctions on bus routes with high excess wait times and low bus speeds and integrate the Junction Protection Programme, which seeks to reduce the potential of junction collisions by ensuring vehicles are not parked within 10 metres of a junction.	Camden
Safety		
Bus stop safety	• Review conditions at bus stops around the borough, including levels of lighting and proximity to nearby safety points (e.g. restaurants, shops).	Camden

Category	Detail	Lead Organisation
	• Use findings from the survey carried out by Camden's Community Safety team on the experiences of women and girls living, working and travelling around the borough to inform bus stop safety improvements. • Conduct a review of bus stop bypasses in the borough to ensure alignment with TfL's Bus Stop Design Guidance, such as optimal width and length of the bus stop island. Using boarding data and cycle flow data, determine whether shared use bus stops would be suitable based on TfL's interim guidance on shared use bus boarders. • Consider providing additional pedestrian crossings to improve safety of passengers travelling to and from bus stops. • Explore options for decluttering footways adjacent to bus stops and around the boarding/ alighting zones in new schemes. • Work with TfL to resolve overheating issues on Routemaster buses.	
Bus Route Development		
Connectivity Analysis	Collaborate with TfL to conduct a connectivity analysis of the borough's bus network to identify opportunities for new routes and/or route enhancements, including reallocating bus stops. The north of the borough will be prioritised given the demonstrated need for improved services and connectivity. Any new suggestions will be considered against the constraints of (a) current financial constraints, (b) requirement for a business case by TfL, and (c) protecting links already being offered by the existing network *Next steps include:* • *Undertake a comprehensive study of existing routes against potential and upcoming changing land use patterns to develop ideas for future enhancements* • *Work with TfL to re-evaluate routes that have recently been shortened to understand the outcomes of this change and monitor changes in use.*	Camden & TfL

Category	Detail	Lead Organisation
Demand for orbital routes and increased frequency	• Lobby TfL to review the feasibility of expanding / amending existing routes (e.g. 603) or creating new orbital routes by reviewing capacity levels or overcrowding on these routes and analysing origin-destination data to understand travel patterns in these parts of the borough that could be served by a new or more frequent bus route. • Lobby TfL to expand Superloop services to the north part of Camden as part of their expansion programme.	Camden & TfL
Promoting the bus		
Communications and Offers	Promote buses and sharing improvements to bus infrastructure and service (such as improvements to bus speeds and reliability) through relevant communication channels. Communications could occur in conjunction with other area improvements such as development of mobility hubs, Safe & Healthy Streets projects or School Streets etc and through travel plan initiatives for new developments. *Next steps include:* • *Liaise with the council's and TfL's communications and marketing teams to identify further opportunities to promote buses and raise awareness of services and benefits.* • *Explore the opportunity for financially incentivising bus use through support offers especially for parking permit holders*	Camden
Collaboration		
Continuous collaboration and data-sharing	Camden to meet with relevant TfL stakeholders regularly to review ongoing opportunities and latest bus data to understand progress of ongoing improvements. Explore with TfL the feasibility of reinstating the annual TfL Public Transport Liaison meeting in Camden to which local groups are invited. *Next steps include:* • *Request quarterly data from TfL with metrics such as zero emission fleet progress in Camden, bus safety data, average bus speed by route and passenger boarding numbers by bus stop.*	Camden & TfL

Category	Detail	Lead Organisation
	• *Set up quarterly meetings with TfL to review progress on these next steps and alignment with wider TfL Bus Action Plan*	
Inter-borough collaboration	Identify opportunities to work together with neighbouring boroughs to improve bus priority on routes that run through Camden, especially those with high excess waiting time and low bus speeds. These include Routes 27, 24, 188 and 393.	Camden
Funding		
Integration with planning policy and improvements through S106 funding and CIL	Camden to review where S106/S278, the Community Infrastructure Levy (CIL), or road maintenance works could financially support improvements to bus network and infrastructure, especially around planned developments. Improvements should include measures, such as increasing number of countdowns, bus stop shelter upgrades, bus electrification and to support extended or new bus lanes on priority routes identified in this report. *Next steps include:* • *Review our existing planning/transport planning policies including CPG 7 to ensure that we maximise opportunities for planning contributions via s106 to enhance the bus network and bus infrastructure in the borough*.	Camden
Workplace Parking Levy	Conduct a feasibility study for the potential to implement a Workplace Parking Levy (WPL) which could fund bus improvements.	Camden
Joint funding opportunities with neighbouring boroughs	Look at joint funding opportunities with neighbouring boroughs that would benefit from bus improvement schemes. Use insights from the Inter-Borough Collaboration recommendation where possible	Camden
LIP funding / Better Bus Partnership	Utilize Local Implementation Plan (LIP) and Better Bus Partnership funding for bus priority programs.	Camden & TfL
Safety		
Vision Zero	Collaborate with TfL to develop a pathway for reducing bus-related KSI (from 38 casualties in	TfL

Category	Detail	Lead Organisation
	2023) to achieve zero fatalities (in or by a London bus) by 2030 and zero KSI (from all road collisions) by 2041, in line with the Vision Zero commitment. *Next steps:* • *Identify priority junctions and roads using casualty data (summarised on page 34).* • *Review Camden bus-related casualty data annually ensure Camden is on track to meet 2041 Vision Zero goals.*	

Monitoring

To ensure that the measures outlined above in this report are appropriate and effective in meeting our overall aims and objectives, Camden has set the following targets:

Target	Monitoring Targets	Related
Improve the bus speed in the borough, in line with overall goal of 8.1 mph by 2041	Bus Speeds	Bus reliability; promoting the bus
Increase number of trips made by bus, in line with MTS target for 80% trips to be made by walking, cycling and public transport by 2041.	Resident trips by mode of transport	Promoting the bus; bus reliability; Bus access
Reduce average excess waiting time by 10% (from baseline of 1.2 minutes) to be in the top 25th percentile among inner London boroughs (currently in the 50th percentile)	Excess waiting time	Bus reliability; promoting the bus
Decrease casualties from buses, in line with target of zero people killed by 2030. An interim target could be to reduce by 50% by 2027 (from 2023 baseline data of 38 bus-related casualties)	Bus-related casualties	Safety