

Background information for the Transport Committee's report on river services

This document contains information received during the Transport Committee's work on river services.

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London Assembly Transport Committee visit



Fast ferry history on the Thames



1905 - London City Council, King Alfred



1960 - Thames Launches, Denny D2



1969 - First Hydrofoil on Thames, Shearwater 5



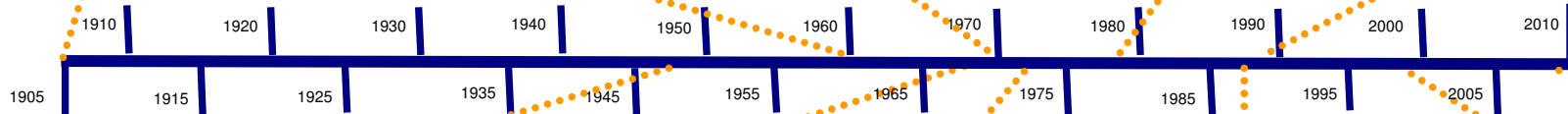
1978 - Kometa



1989 - River Bus



1999 - Thames Clippers, Sky Clipper



1947 - Odells' River Bus Service, Oenid



1968 - Hover services, HM2



1973 - Raketa Hydrofoil



1988 - Thamesline London Docklands



Thames Clippers overview



Established in 1999 with just one boat, Thames Clippers now carry over 8,500 passengers per day. Our company continues to expand as more and more people appreciate the advantages of river travel.

Our fleet of high-speed catamarans run every 20 minutes and every 10 minutes during peak commuter hours between London Bridge and Canary Wharf. The main route operates over an 18 hour period and links with many of London's top attractions including Waterloo, Greenwich and The O2.

Thames Clippers operate an Express service for The O2 on event nights providing a direct transfer from Waterloo or London Bridge to The O2 in just 30 minutes.

A dedicated service is also provided between the Tate Modern & Tate Britain offering a 40 minute frequency between the two galleries 7 days a week.

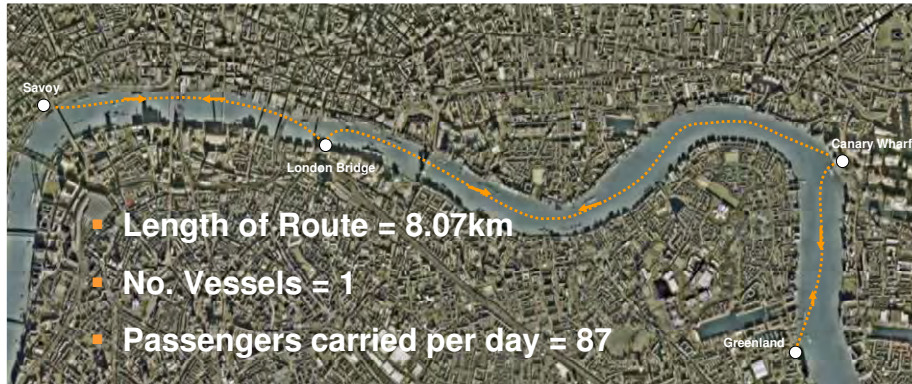


Incremental service growth 1999 - 2003

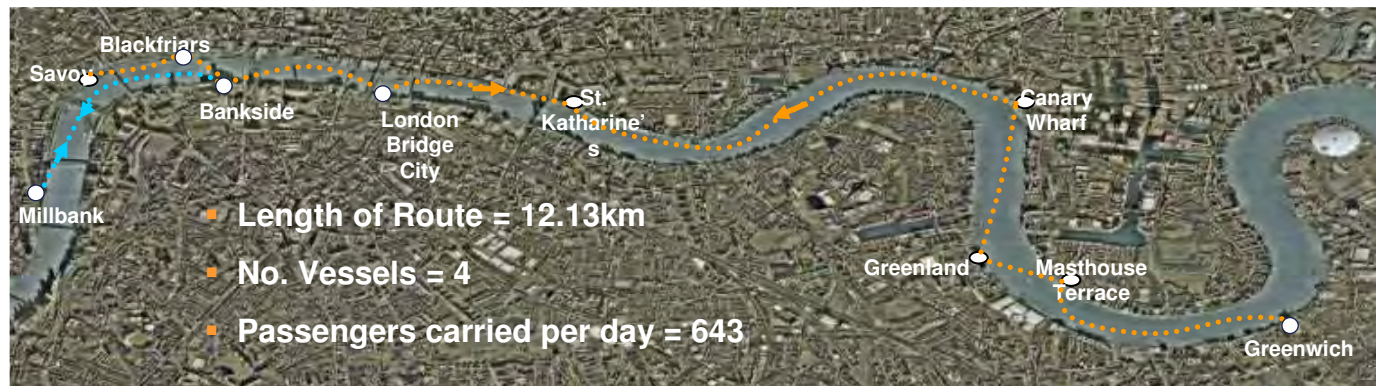


thames
clippers
fast:frequent

1999 - initial area of operation



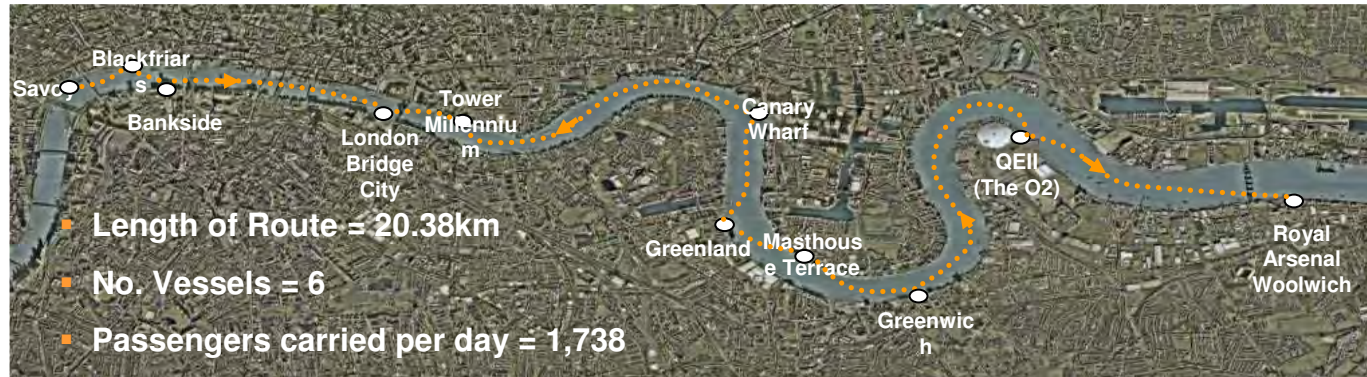
2003 – area of operation



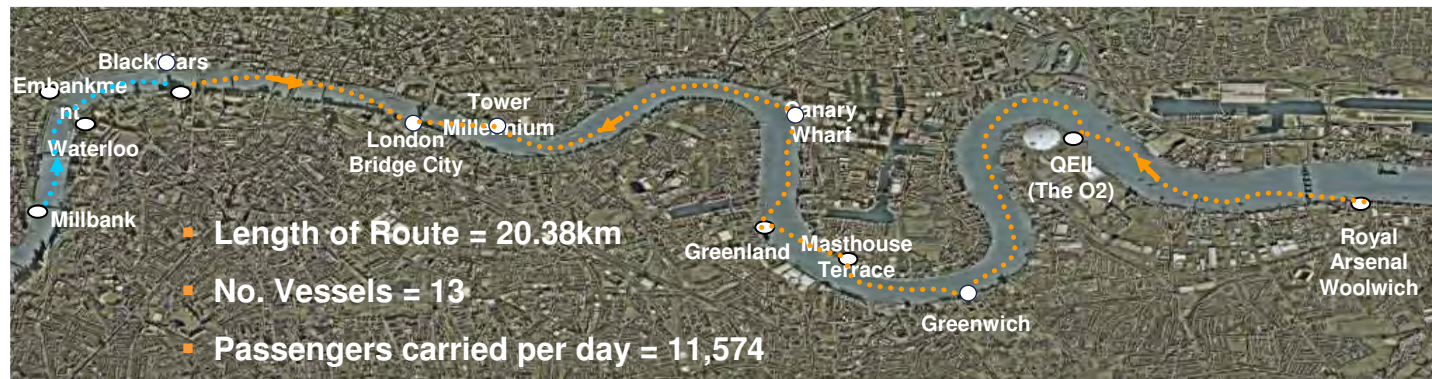
Incremental service growth 2005 - 2010



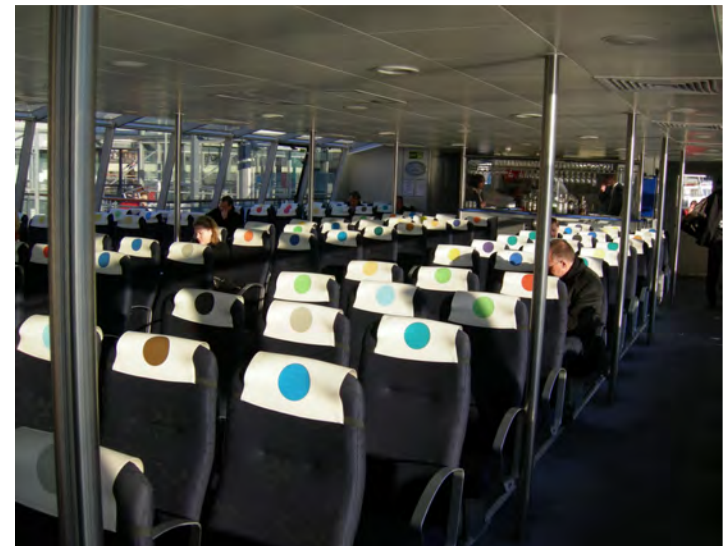
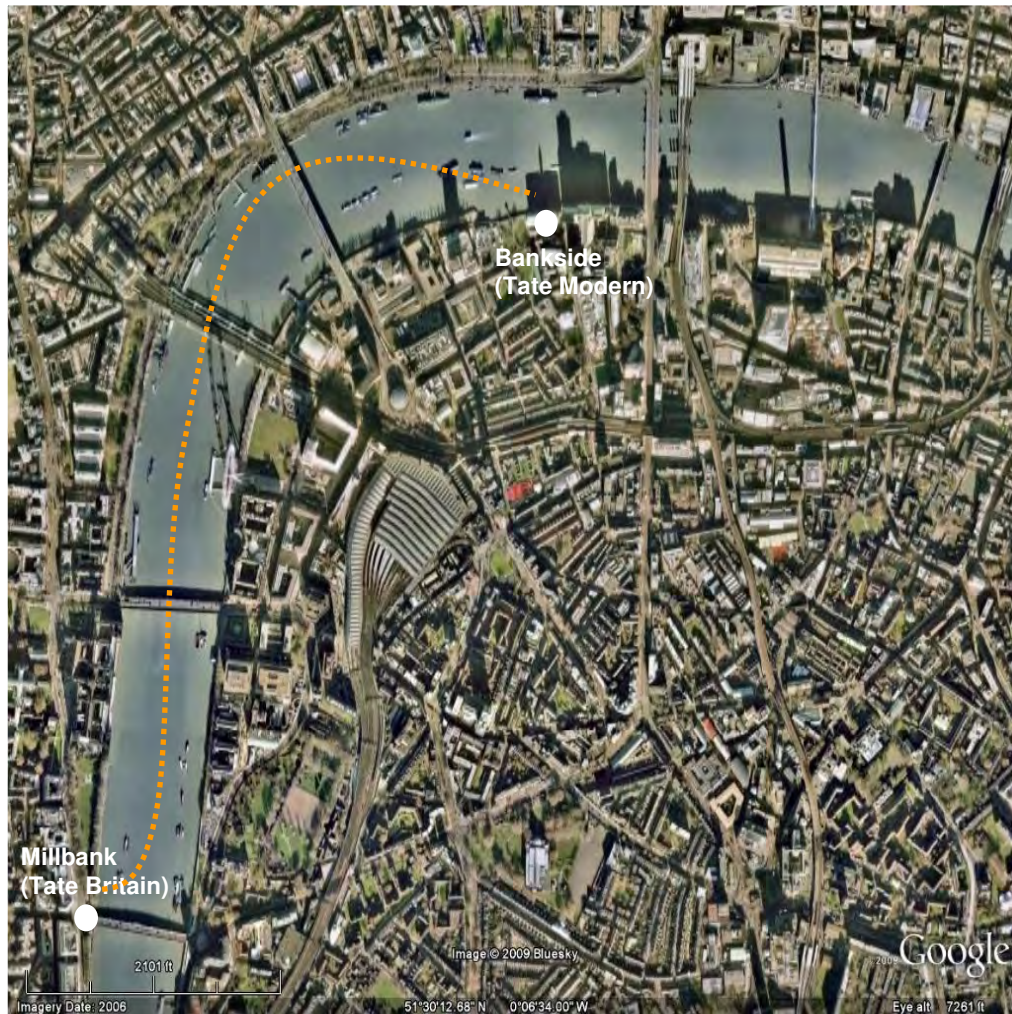
2005 – area of operation



2010 – area of operation



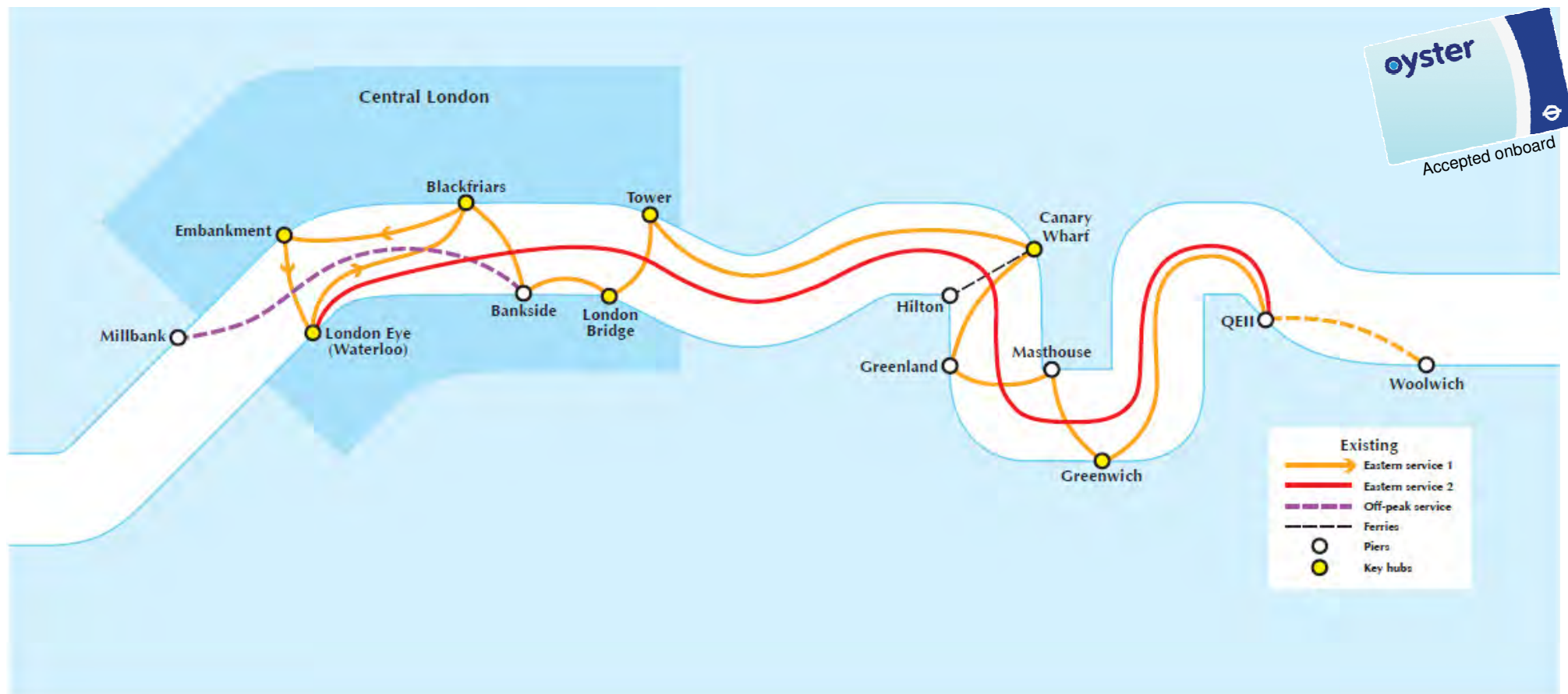
Tate to Tate Service



Routes today

KPMG

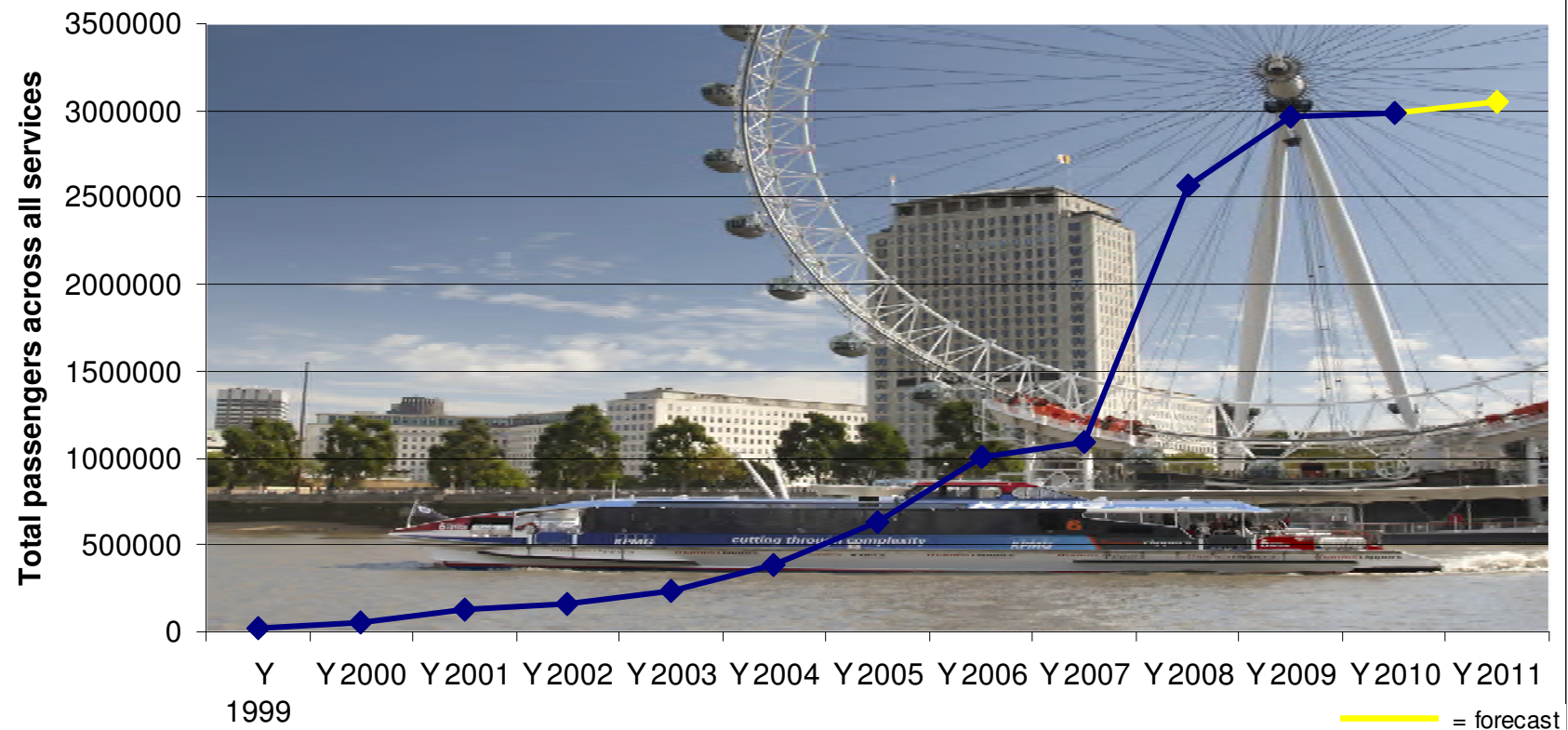
thames
clippers
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Passenger growth



Thames Clippers Annual Passenger Numbers 1999 - 2011



A unique travel experience

KPMG

**thames
clippers**
fast:frequent

Fast



Unique river experience



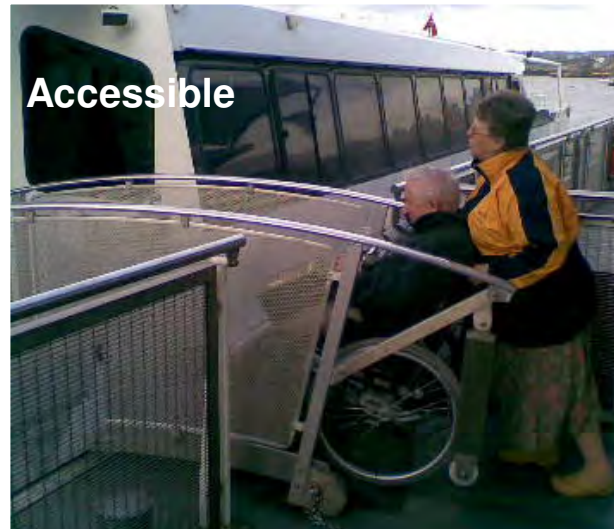
Efficient boarding



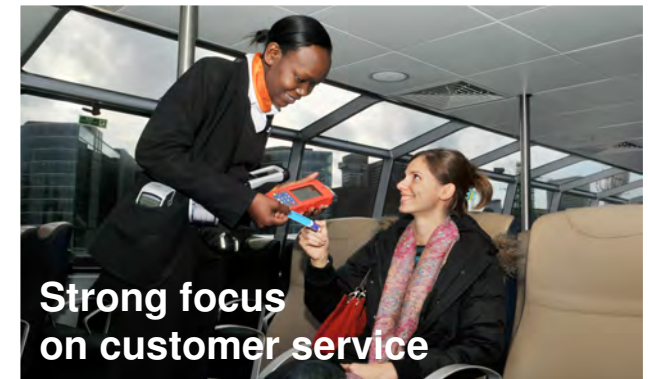
Punctual & reliable



Accessible

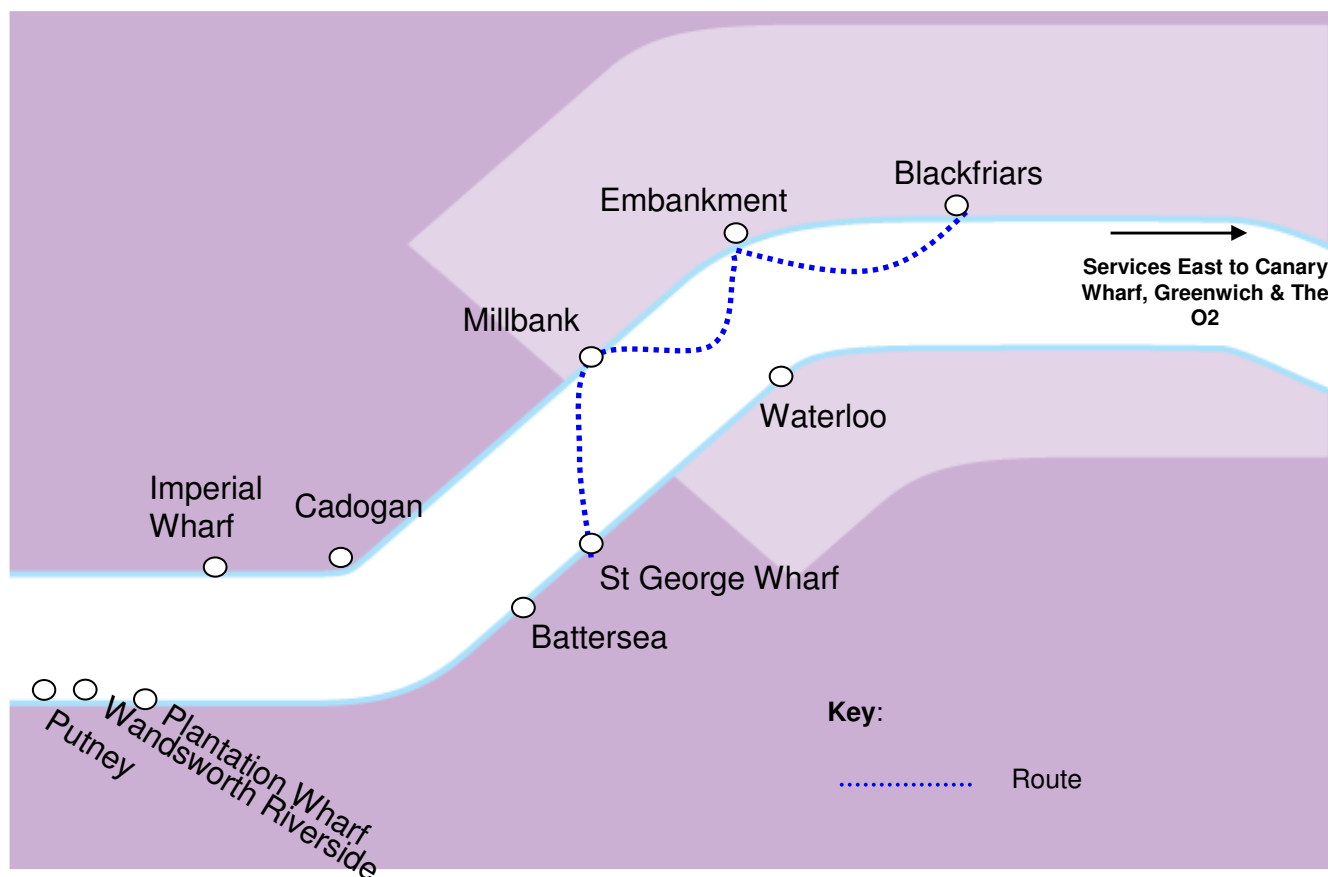


**Strong focus
on customer service**



Extension opportunities

– recent expansion

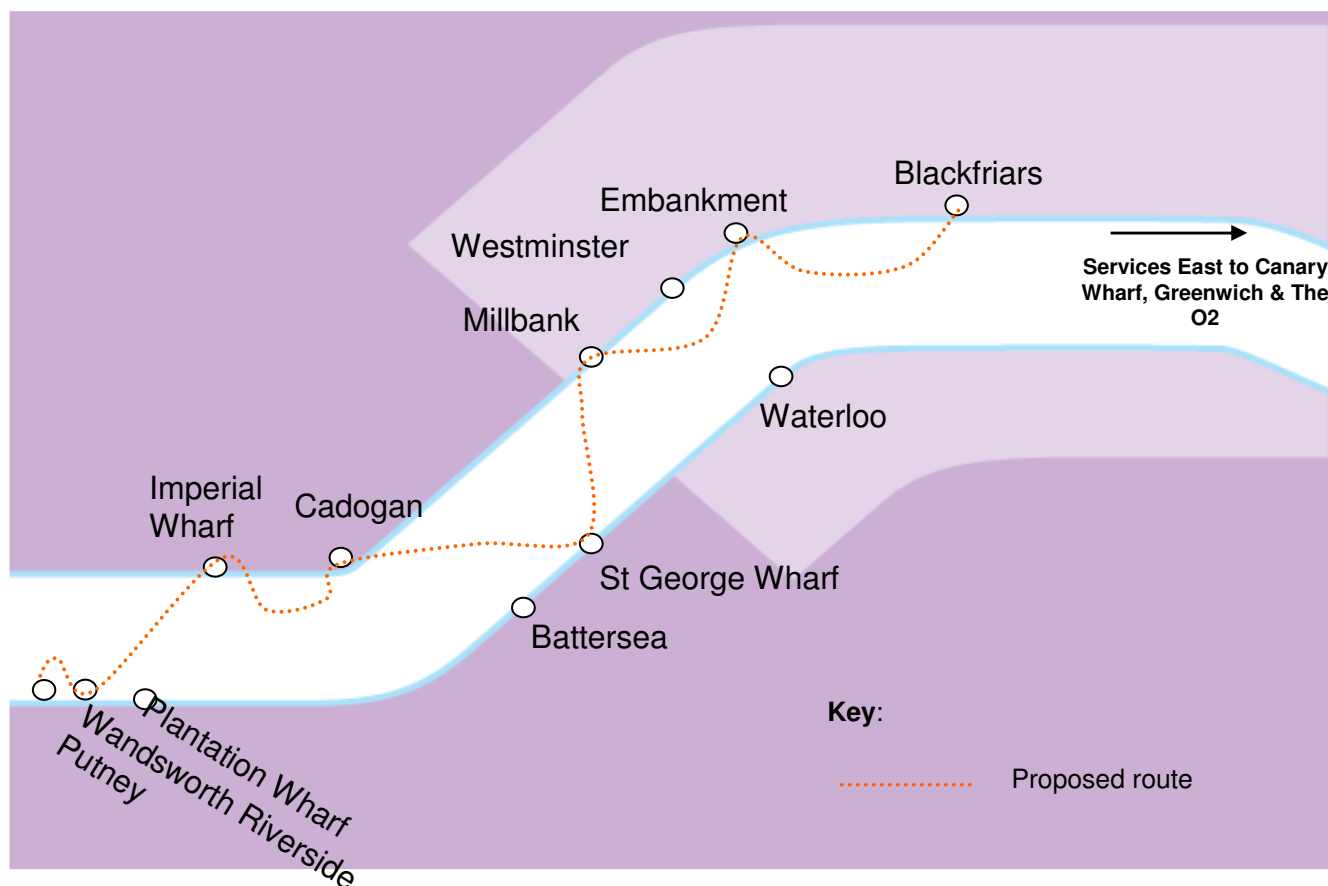


- Use of existing smaller craft 62 and 138 seater vessels
- 40 minute frequency from St George Wharf, Millbank and onto Central London
- Passenger guarantee for pump prime service from St George Wharf
- Infrastructure / pier investment from St George



Extension opportunities

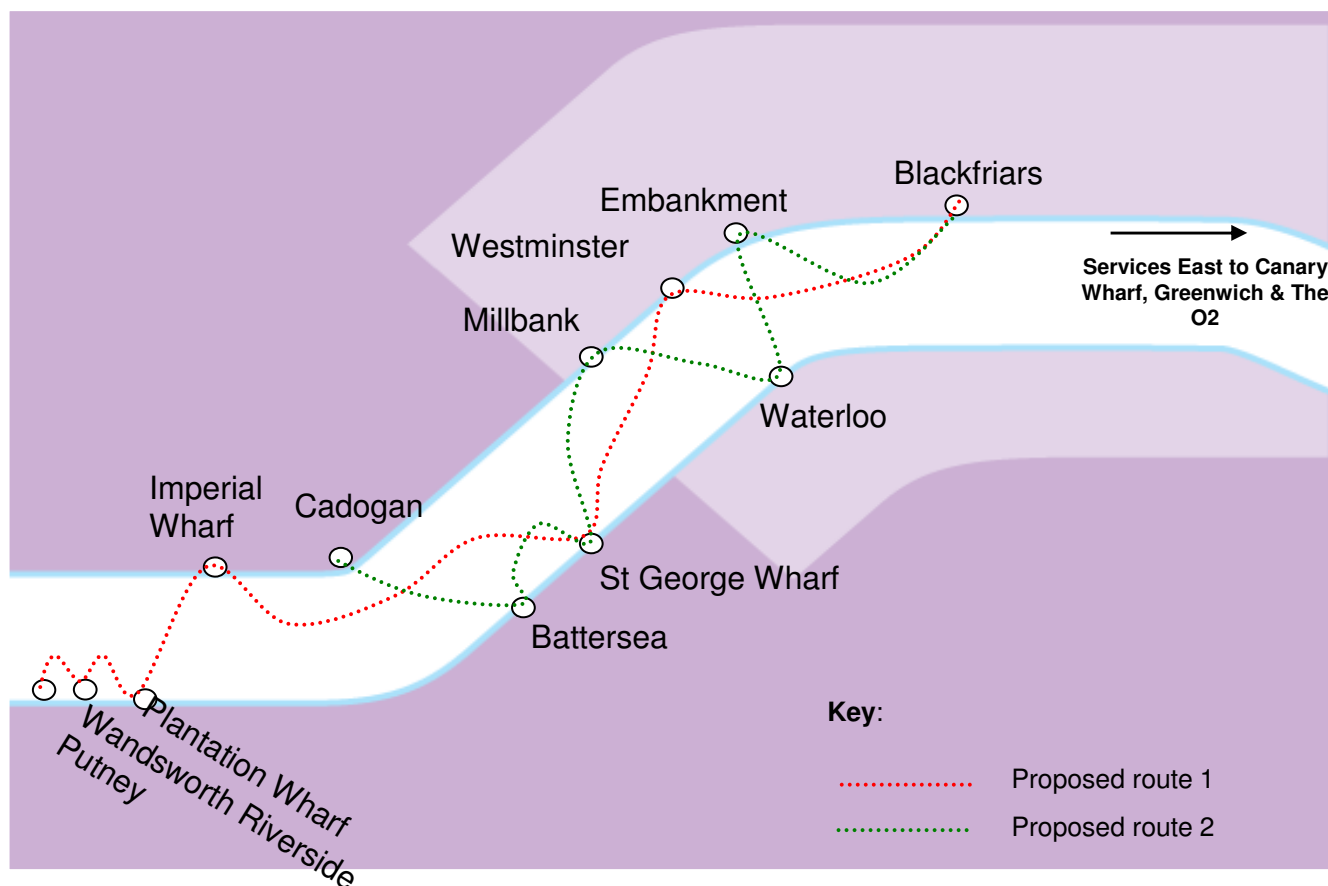
– short term



- Expansion as far as Putney
- Combined use of 62 and 138 seater vessels
- General pier investment will be crucial along with reliable informative real-time passenger information
- Dedicated Central London pier slots for scheduled services
- Interchange at Blackfriars for services further east



Extension opportunities – long term



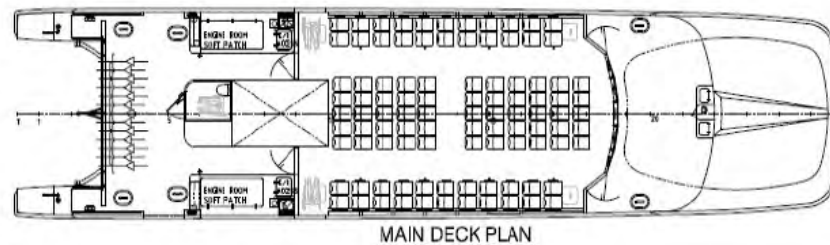
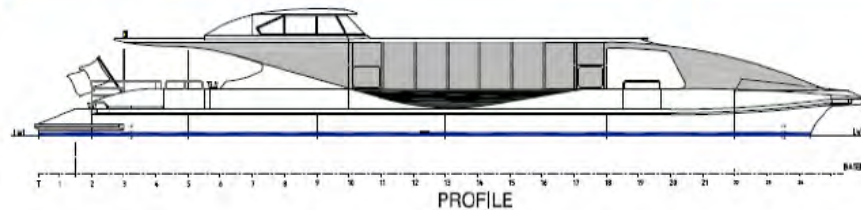
- Division of routes is required to ensure the middle section has adequate capacity
- Investment in up to 3 new craft
- Dedicated pier berths for scheduled services
- Interchange potential with East London river services



Concept design for new Fast Ferry for service between Central London & Putney

KPMG

thames
clippers
fast:frequent



Overall Length	27.0m
Length Waterline	25.5m
Beam Overall	7.8m
Depth Moulded	2.3m
Draught Air Draft	1.0m
Passengers:	
Main Saloon	103
Aft Deck	12
<i>Total</i>	<i>115</i>
Bicycles	12
Crew	3
Service Speed	22knots



How can we make this happen



- **Operator investment in new bespoke craft**
 - Minimum of three new craft for long- term routes
- **Strategically located piers**
 - Interchange potential with other TfL modes including cycle hire scheme
- **Strategic lead to deliver enhanced central London hubs**
 - TfL dedicated development resource for riverbus services
- **Subsidy to start service via:**
 - Planning and S106 process
 - Council support
 - TfL
- **Pier infrastructure**
 - Inclusion within riparian Borough strategies (e.g. LDFs)
 - Waiting facilities / access for all
 - Good signage
 - Real time information
- **Marketing**
 - Introductory offers to residents / tenants
 - Season tickets providing greater value
 - Riverbus inclusion in the entire TfL Transport Network information distribution



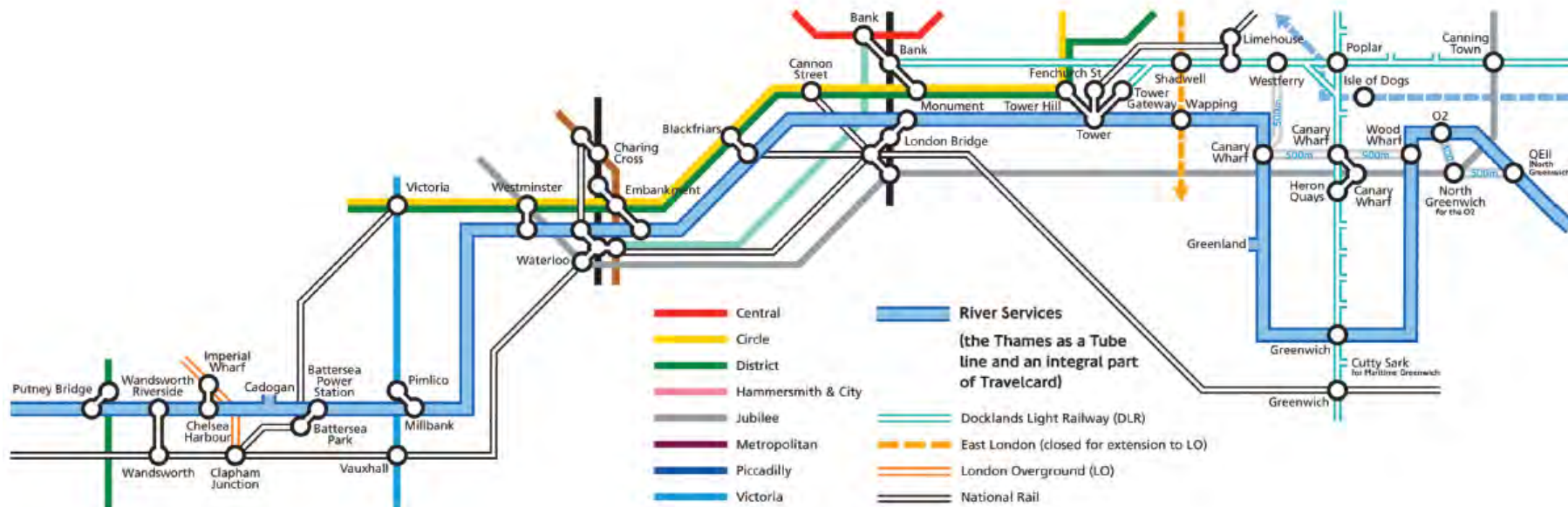
Start-up tool kit



- **Pier infrastructure**
 - Consistent design and specification throughout the entire route
 - PLA and planning consent
 - Investment in new piers
 - Location with good pedestrian / cycle access
- **Craft**
 - Detailed design / tank testing (12 month build)
 - PLA / MCA approvals to operate
 - Costing – build / delivery
 - Minimum capacity per vessel – 120 seater
 - Deliver a consistent journey time that does not vary with tide
- **Western expansion restrictions**
 - Bridge heights
 - Water depth
 - Vessel draft



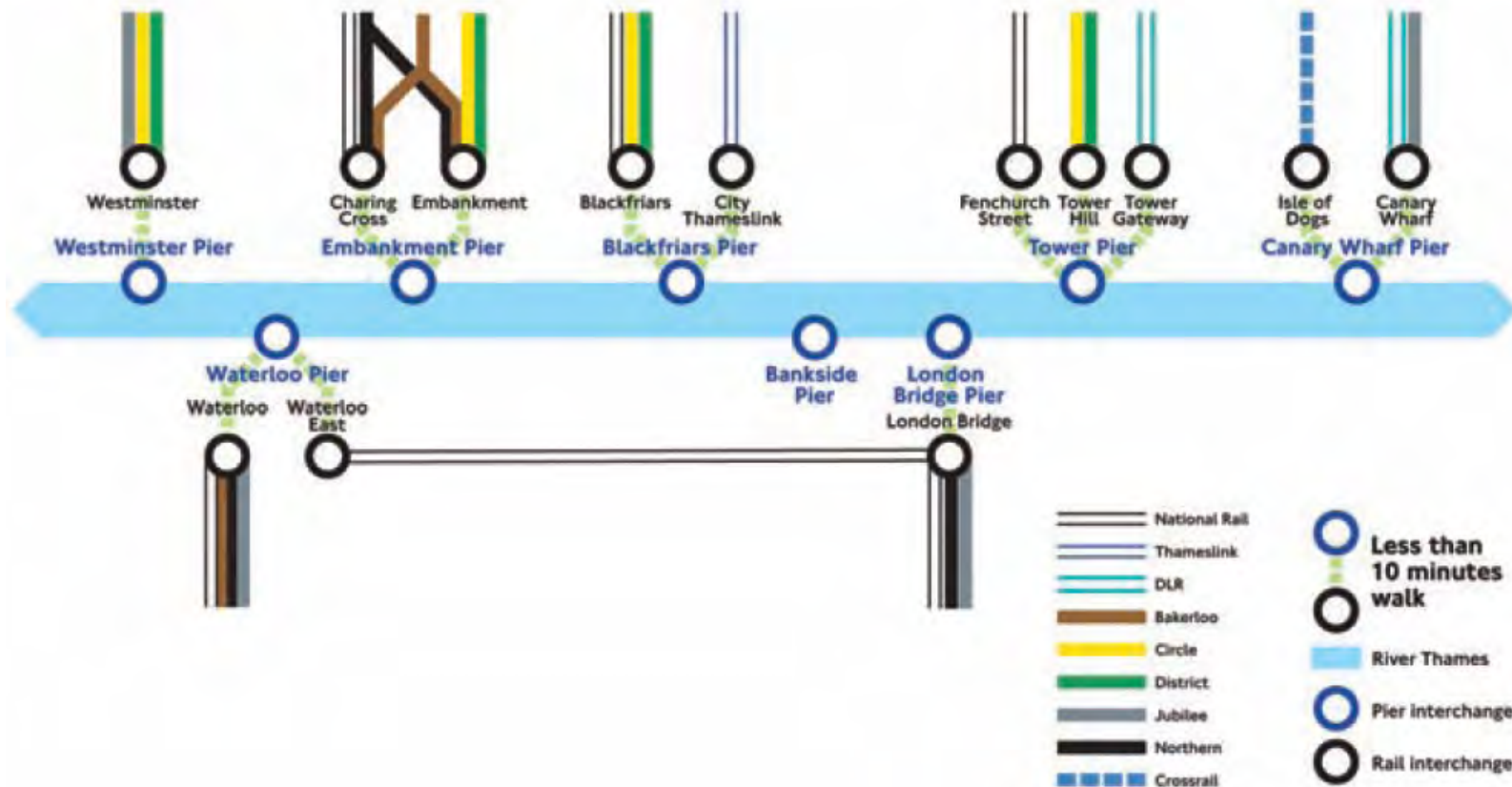
The Thames as a tube line



Central London river interchange connections

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15 minute walk from Central London piers

KPMG

thames
clippers
fast:frequent



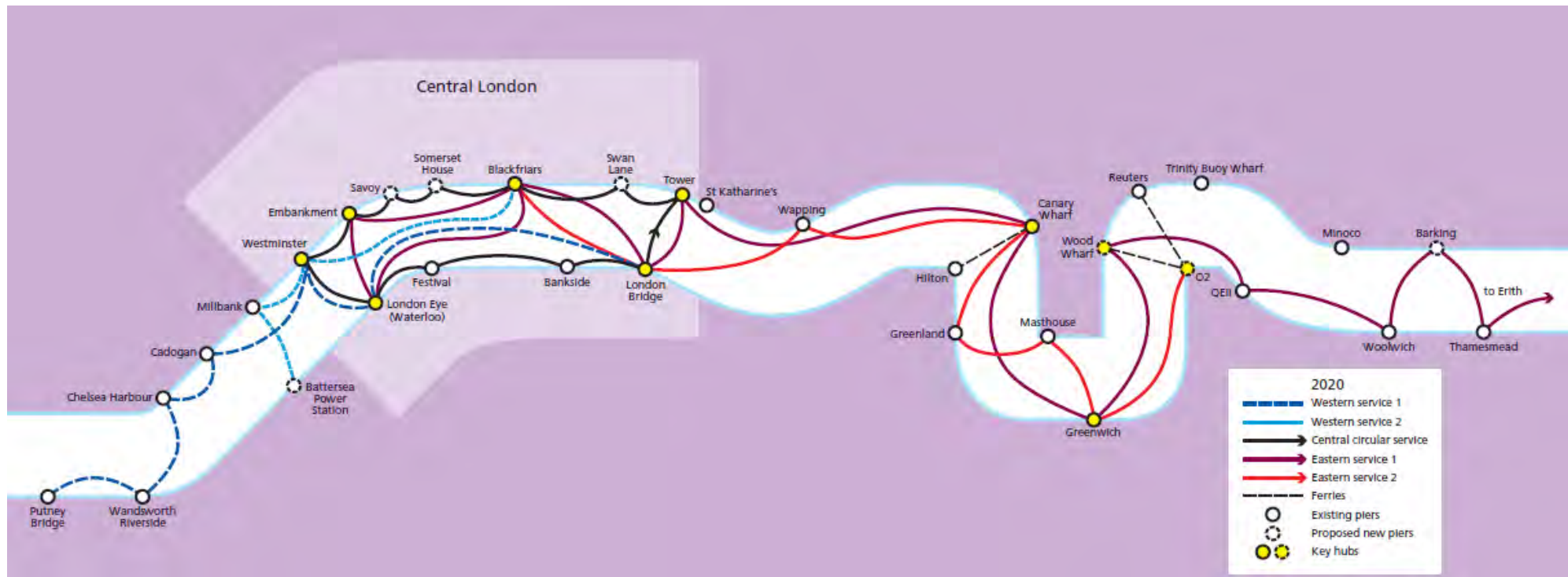
The potential prize



- Frequent, all day (18hr) services between Woolwich and Putney
- A Central London circular linkup service
- Good interchange links with tube, rail and cycle

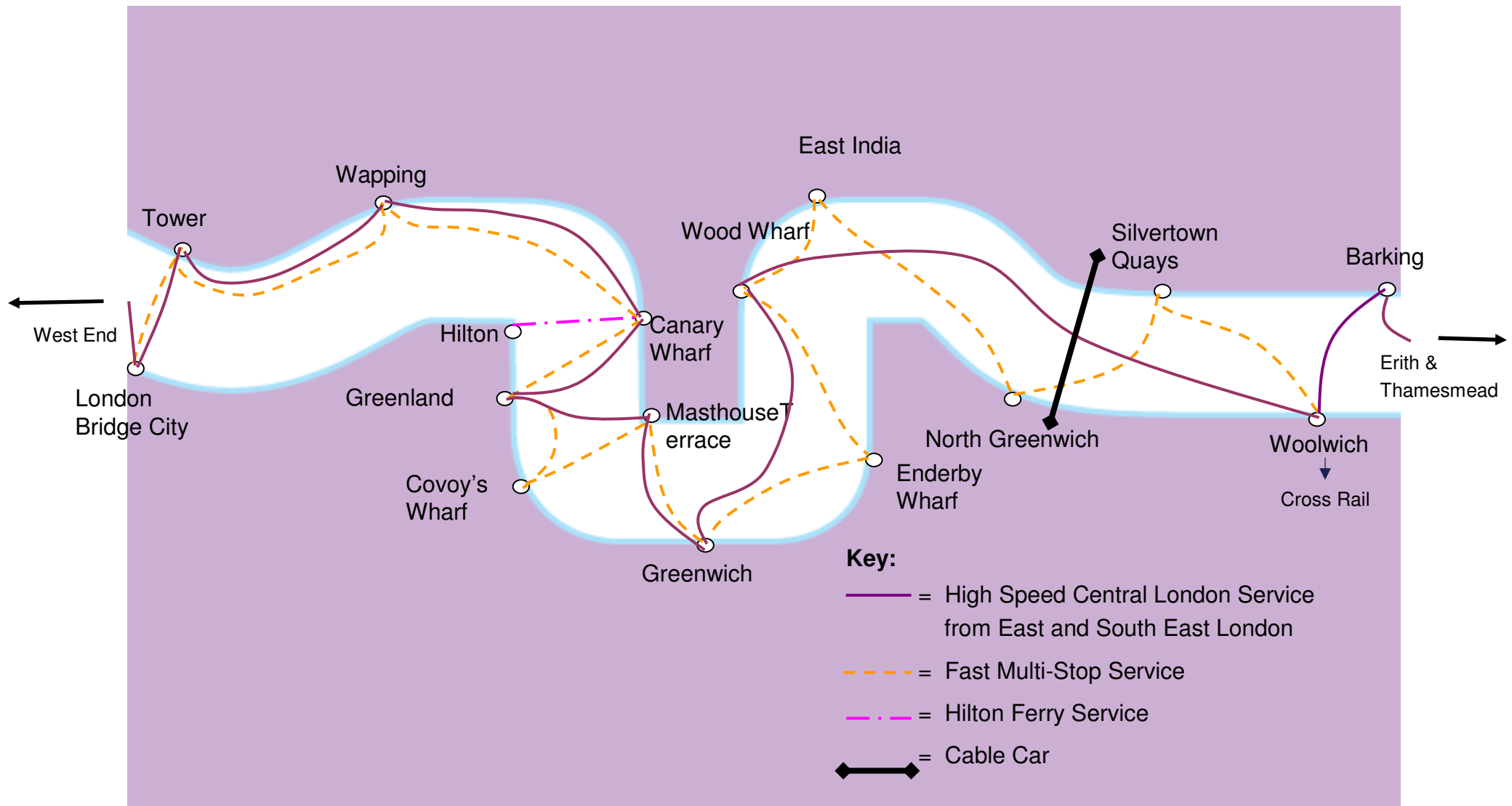


Possible services in 2020 spanning 16 miles





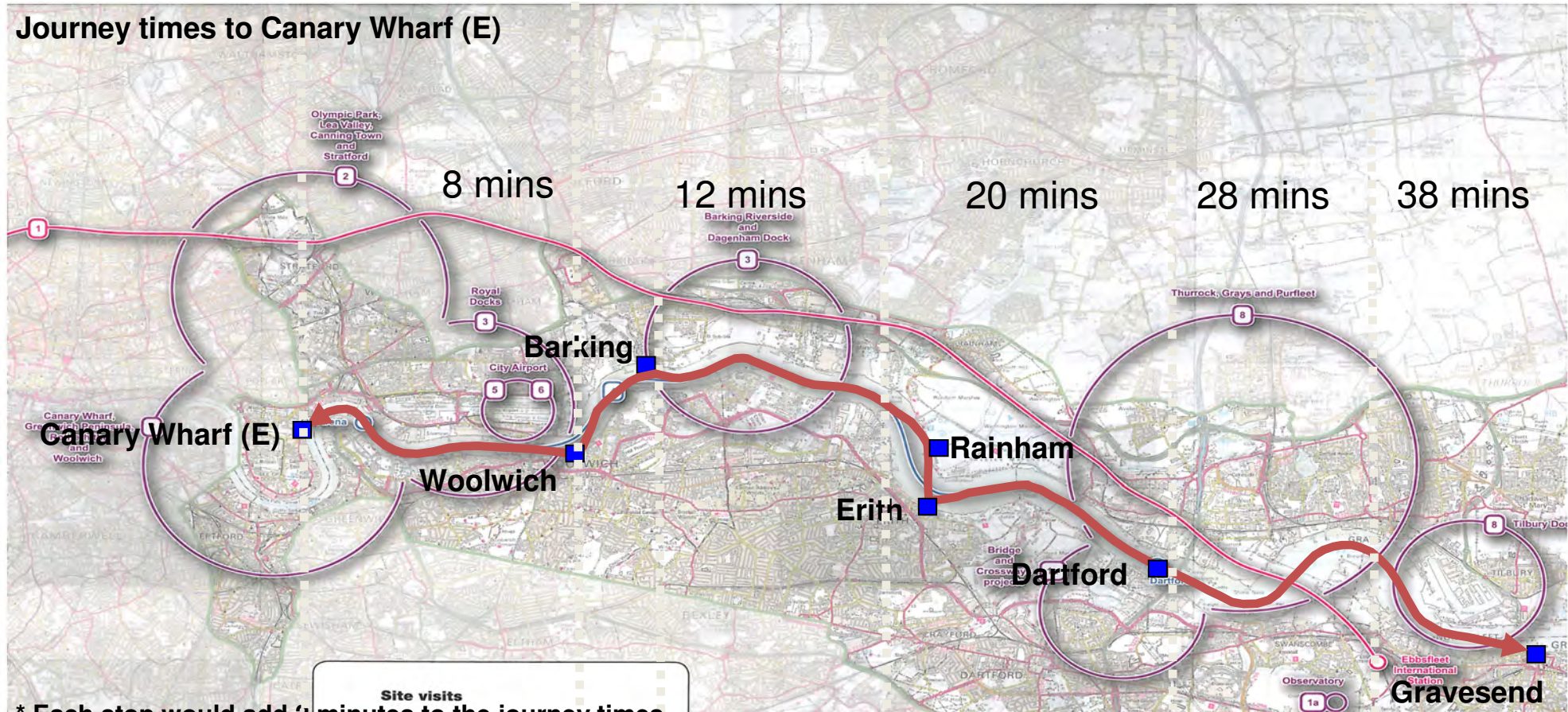
Future eastern expansion



Possible journey times East



Journey times to Canary Wharf (E)





thames
clippers
fast::frequent

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2 February 2012

Dear Ms Warren,

Transport Committee meeting on 17 January 2012

I write in response to Caroline Pidgeon's letter of 20 January 2012. This letter requested further information on river transport following the Transport Committee meeting on 17 January.

Ms Pidgeon's letter put forward three points on which further information was required and I present our responses to these points below.

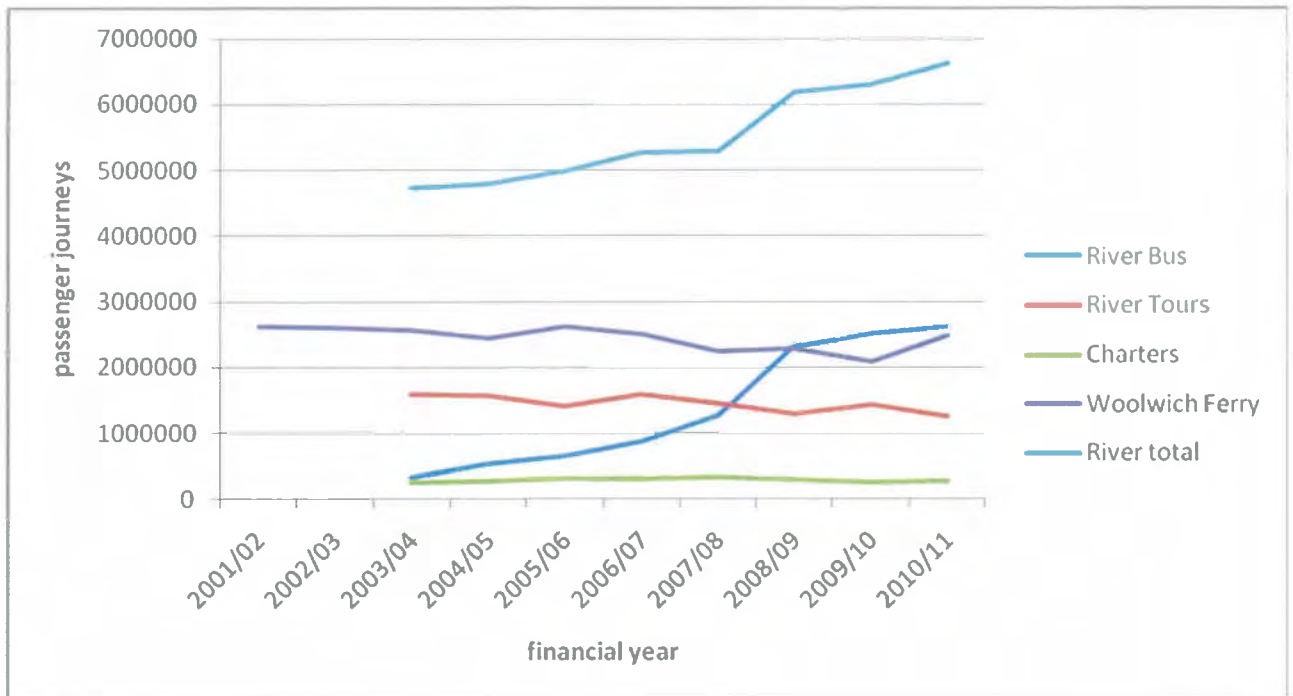
1. River passenger numbers for each year since 2000/1 broken down by each type of service including river bus, tour, charter and the Woolwich ferry

The only useful river passenger statistics that can be provided for the years from 2001/02 and 2002/03 are for passengers carried on the Woolwich Ferry. All other passengers at this time were not recorded in a way that is comparable with the statistics from 2003/04 onwards. The available statistics are shown in the table and figure below.

Table 1: River Passenger Journeys

	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
River Bus			323106	525439	647814	862573	1270195	2328315	2534829	2631292
River Tours			1583364	1555441	1407009	1581779	1438427	1276378	1426816	1243347
Charters			256600	262400	304400	306285	328755	283920	248500	265141
Woolwich Ferry	2621592	2613988	2562208	2449848	2626705	2509520	2249000	2291276	2088788	2481336
River total			4725278	4793128	4985928	5260157	5286377	6179889	6298933	6621116

Figure 1: River Passenger Journeys



2. TfL's subsidy for river services including a breakdown of what the subsidy provides for and how the level of subsidy compares to the subsidy for other TfL services e.g. buses, the Tube and the cycle hire scheme

TfL defines its subsidy for river services in terms of direct payments to boat operators to support the cost of providing their services. TfL does not include the operating costs of London River Services Limited such as pier maintenance, etc.

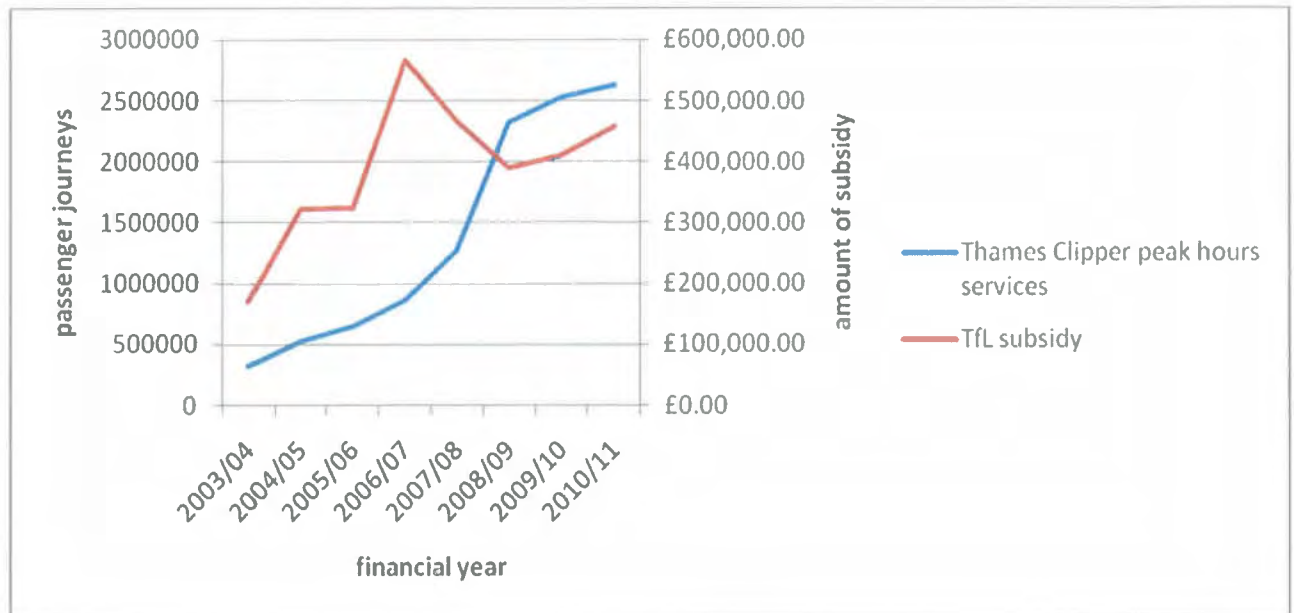
TfL currently provides a subsidy to the two River Bus service operators: Thames Clippers and Complete Pleasure Boats. The subsidies are provided on a net cost basis and a proportion is dependent on the completion of the full scheduled timetable.

Thames Clippers

TfL financially supports Thames Clippers' weekday peak hour service between London Eye and Woolwich Arsenal Pier which operates under contract. The remainder of Thames Clippers' services are operated under licence on a commercial basis.

The subsidy paid is calculated in accordance with a formula every 4 weeks. For example, in the 4 weeks ending 10 December 2011 Thames Clippers were paid £30,811.69. In the same period on the number of passengers carried on the contracted services was 48,465; which works out at a subsidy of 64p per head per journey. A comparison of passenger numbers with the level of subsidy can be seen in Figure 2.

Figure 2: Passenger Journeys Compared to Level of Subsidy



Complete Pleasure Boats

Since 3 January 2012, TfL has also supported the Putney to Blackfriars service following the withdrawal of the previous main operator. The current service is a temporary six month arrangement involving a subsidy of £6000 per four week period while the future of the service is further investigated. There are no precise records of the number of passenger using this service in the past. Best estimates would make this a subsidy of 89p per head per journey.

Comparison with TfL subsidies for London Bus Network

Table 2 below shows a comparison between the subsidies TfL provides to river services and to the bus network. Direct comparisons between modes however are often inappropriate due to the use of different operating models and differing journey lengths.

Table 2: TfL transport subsidies for bus network and river transport

	Subsidy per Passenger Journey
River Transport	76.5 pence
London Buses	19 pence*

*figure for 2010/11

3. The environmental impact of river services including their level of pollutant emissions and how this compares to other transport services.

In 2010 TfL undertook a detailed assessment of the environmental impact of river boat services with regard to carbon dioxide and air pollutant emissions. The analysis was based on data collated for 2008/9 and comprised River Bus services, River Tour services and the Woolwich ferry, but excluded charter

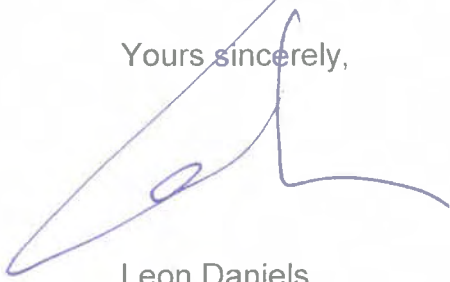
services as no data was available regarding such services. Results from this assessment are presented in the appendix to this document.

The Mayor's River Passenger Services Concordat Environmental Group has agreed an action plan to reduce emissions from river services. Actions include:

- conversion of the Woolwich ferries to use Ultra Low Sulphur Diesel (achieved in 2011) reducing sulphur emissions by 99%
- fitment of diesel particulate filters on a trial basis to one Woolwich ferry in the first quarter of 2012 and, if successful, fitting all ferries by March 2013 reducing PM emissions by 90%
- a number of smaller initiatives by private operators including an eco-driving programme.

I trust this information is of assistance to the Committee.

Yours sincerely,



Leon Daniels
Managing Director – Surface Transport

Appendix: Detailed environmental information

Figures 3 to 6 show the total tonnes of each pollutant, compared to emissions for other transport modes that TfL either directly manages or has influence over. TfL emissions are reported each year in TfL’s Annual Environment Report. The only exception to this format was in relation to sulphur dioxide emissions, which were presented as a percentage of all transport modes in London, as TfL’s emissions were negligible.

Table 3 shows the percentage contribution that river services make to all transport emissions in inner London and greater London.

Emissions per passenger journey have not been calculated as these would not be directly comparable to emission intensity figures for other transport modes, which are expressed as emissions per passenger km.

Figure 3: Percentage contribution that river services make to TfL’s emissions of PM10 (tonnes per annum)

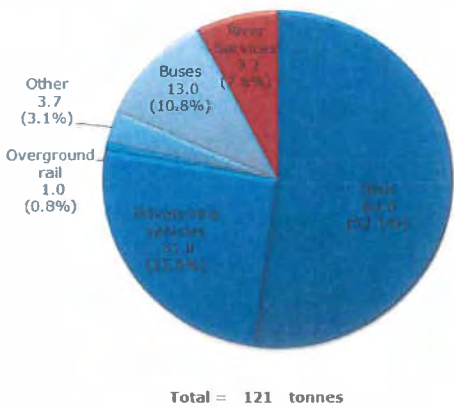


Figure 4: Percentage contribution that river services make to TfL’s emissions of oxides of nitrogen (tonnes per annum)

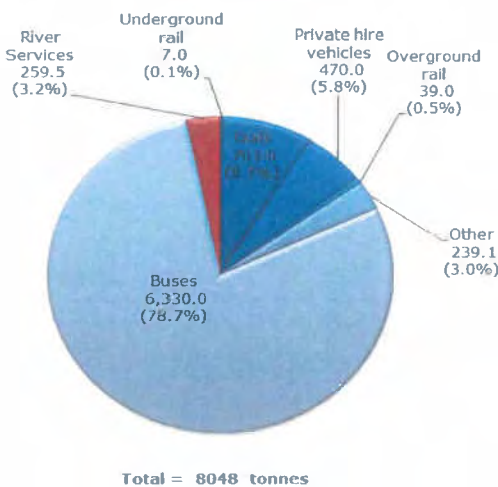
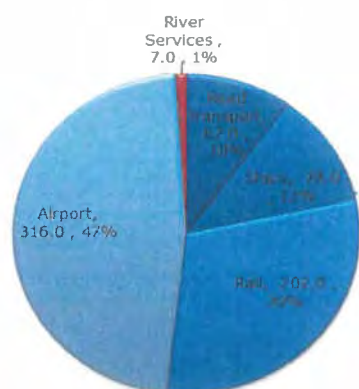
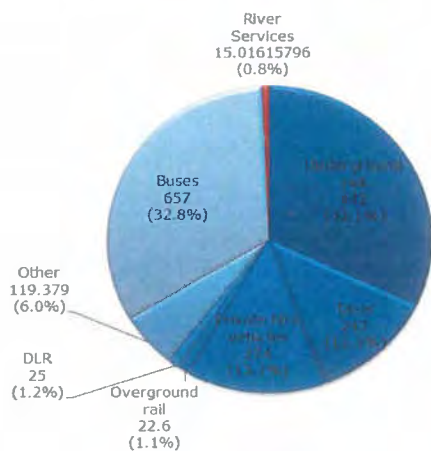


Figure 5: Percentage contribution that river services make to London transport’s sulphur dioxide emissions (tonnes per annum)



Total = 670 tonnes

Figure 6: Percentage contribution that river services make to TfL's emissions of carbon dioxide (tonnes per annum)



Total = 2002 tonnes

Table 3: Percentage contribution that river services make to transport emissions in inner and greater London

Pollutant	Contribution to TfL emissions (2008/9)	Contribution to transport emissions in Inner London	Contribution to transport emissions in Greater London
Particulates	7.6%	2.0%	0.6%
Oxides of nitrogen	3.2%	3.0%	0.8%
Sulphur dioxide	N/A	3.5%	0.8%
Carbon dioxide	0.8%	N/A	0.2%

Notes:

1. London transport emissions are from the London Atmospheric Emissions Inventory 2008
2. The Inner London boundary largely follows that of the north/south circular

Mayor of London's River Concordat Group

February 2012

Workstream updates



Mayor of London's River Passenger Service Concordat Group

Title: Olympic Services

Lead: Simon Jay
Sustainable Modes Transport Manager
Olympic Delivery Authority

Summary:

- Ensure river passenger services are fully promoted for spectator and workforce travel to London 2012 Olympic Games venues and events
- Ensure spectators, workforce and other visitors using river services during the London Olympic Games enjoy a positive river travel experience.
- Contribute to a legacy of enhanced use and awareness of the river for transport purposes

Progress update:

Progress

- Contracts in place which make provision for operation of a 2012 Games Riverbus Express service (operated by Thames Clippers) and a 2012 Games River Tours Service (joint service operated by City Cruises/TRS). All schedules relating to these services are agreed and loaded in the London 2012 Spectator Journey Planner. Online ticket sales for these services are steady.
- Contract with Turks Launches for operation of a 2012 Games Hampton Court river shuttle service (Kingston Bridge – Hampton Court Palace) being finalised. On the day ticket sales only.
- Queue management plans for all relevant venue and central London piers currently being developed. Draft plans in place. Aim to test Greenwich pier queuing plans at Easter 2012.
- Meeting of Olympic services concordat sub-group held on 7/12/11.
- No further consideration / requirement for a North Greenwich to East India (Reuters) pier river service for Games Family in the event of an incident shutting the Blackwall Tunnel.
- E-mails going out to Games event ticket holders advising of venue transport options including links to river operator's booking systems.

Issues

- Greenwich pier and Promenade development. Ensuring a robust queue management plan for 'business as usual' including any required enhancements for Games is put in place.
- Understanding demand for charters at key piers and impact on queue management arrangements.

Next steps

- Sign off contract with Turks for provision of a river shuttle service to Hampton Court for the cycle time trial event on 1st August 2012.
- Finalise and sign off pier queue management and staffing plans
- Ensure all river service travel information for spectators is up to date

Mayor of London's River Passenger Service Concordat Group

Title: Pier Provision

Lead: Andy Griffiths
General Manager
London River Services
Transport for London

Summary:

- Develop Pier Plan recommendations to extend key central London piers and to build new piers east and west of central London
- Identify central London pier to be extended
- Work with developers on plans for new piers east and west of central London

Progress update:

- Tower pier extension: Pontoon construction complete. Work in progress on site. Completion by end of March 2012.
- Greenwich pier roof: New roof installation completed.
- Outline plans drawn up to extend other key central London piers at Savoy and London Eye
- A new pier opened at Imperial Wharf and St. George Vauxhall
- Enderby Wharf (Greenwich) planning permission granted including a new pier
- Feasibility study completed for Plantation Wharf (Wandsworth)

Issues/challenges:

- Lack of available funding

Next steps:

- Reconvene group to review opportunities to progress central London pier extensions and new pier developments east and west of central London

Mayor of London's River Passenger Service Concordat Group

Title: Fares Integration

Lead: Paul London
Ticket Technology Manager
London Bus Services Ltd
Transport for London

Summary:

- Extend Oyster Pay As You Go fare payment option to those river operators interested in participating
- Consider future fare payment options in the light of TfL's plans

Progress update:

- Oyster Pay As You Go operational on Thames Clipper services since late 2009
- TfL's ticketing system development work is now largely concentrated on use of 'contactless' bank cards; a number of options for using these on the River, and for transitioning from current Oyster technology have been identified, and are being worked through internally.

Issues/challenges:

- Can we find an affordable and equitable way of including operators in TfL's future ticketing plans, or are there other options?

Next steps:

- Engage with operators on possible ways forward, and come to conclusions on this.

Mayor of London's River Passenger Service Concordat Group

Title: Pier Signage

Lead:	Surendra Wanza	Irene Selema
	Senior Programme Manager	Project Manager
	Transport for London	Transport for London

Summary:

- The Pier Signage Workstream aims to:
 - Improve visibility and signage to/from piers
 - Focus on key transport interchanges, to raise awareness of river transport
 - Ensure pier signage is integrated with other Programmes e.g. Legible London, Barclays Cycle Hire
- Pier Signage Phase 1 completed Q3 2010 with 29 signage gaps addressed and pilot illuminated flag installed at Blackfriars pier. Planning on delivering Pier Signage Phase 2 by Autumn 2012.

Phase 2

Progress update:

- New flags installed at eight London River Service Piers.
- New flags installed at first privately owned pier at St George Wharf Pier.
- A total of 26 signs have been installed leaving 90 signage gaps.

Challenges/Issues:

- Borough Consent
 - Awaiting full consent for installation from Tower Hamlets - 28 signage gaps identified (advised that these works cannot be done this financial year due to Olympic works).
 - Greenwich - 13 (12 signs within Greenwich Peninsula to be addressed as part of wider wayfinding signage in the area by March 2012. Awaiting borough update on progress).
 - K & C - 9 left to be installed as other wayfinding strategy has addressed most of the gaps (this is subject to be reviewed).

Other Boroughs:

- Consent now given for 32 signage gaps to be addressed, waiting quotes for the installation before the end of March).
- There are ownership issues with the remaining 8 gaps which TfL are trying to resolve.
- Limited progress/interest on new flags/poles from privately owned piers.

Next Steps:

- Install signs once full consent and quotations are provided (hopefully before the end of March 2012).

GREATER**LONDON**AUTHORITY

Mayor of London's River Passenger Service Concordat Group

Title: Passenger Information / Branding

Lead: Kate Shortall
Marketing Operations
Transport for London

Summary:

- Overall aim is to encourage non-users to use the river as both a means of transport and as an attraction or visitor experience and help existing users make informed decisions about which services to use.

Progress update:

- **Customer research**

A new combined timetable booklet and guide to the River Bus and River tours services was launched in November 2011. Enhanced distribution was undertaken using the services of London calling to ensure availability at key locations.

Issues/challenges:

- 2012 Games poses a capacity / expectation management issue during peak hours due to delays and/or availability of vessels to regular users who may look to switch to an alternative mode.

Next steps:

- To determine and agree 2012/13 marketing objectives
- Begin production of Spring/Summer 2012 guides

Mayor of London's River Passenger Service Concordat Group

Title: Environment

Lead: Anna Rickard
Environmental Manager
Transport for London

Summary:

- Determine the profile of current river emissions (including contribution to transport and total London emissions)
- Identify options (operational and technical) to mitigate negative impacts, focusing on cost-effective/ collaborative solutions where possible

Progress update:

- The Emissions Action Plan is now available on the TfL website.
- A one page eco-driving guidance note was issued to all London members of the Passenger Boat Association in November 2011.
- All three Woolwich ferry vessels were converted to Ultra Low Sulphur Diesel in September 2011 reducing their sulphur dioxide emissions by 99% and PM10 emissions by 10%
- The contractor to supply and fit particulate filters to the ferries was appointed in October 2011
- Thames Clippers have fitted telematic systems to two vessels to allow the fuel consumption of individual Masters to be monitored. Systems not yet operational as engine management software still to be installed.
- City Cruises governed six engines in November 2011 in order to reduce the maximum speed of the vessels, thereby leading to reduced fuel consumption
- Bateaux London has recently replaced two generators and two main engines with the latest technology, resulting in reduced air pollution and fuel consumption
- Solar panels and energy efficient lighting have been incorporated into the design of Tower Pier extension

Issues/challenges:

- Thames Clipper's eco-driving trials have not progressed as quickly as planned due to delays in obtaining the necessary engine management software and City Cruises' eco-driving trials have yet to commence.

Next steps:

- The first Woolwich Ferry to be fitted with particulate filters should be completed by April 2012. This will be followed by a three month trial period before a decision is made to fit filters to the remaining two vessels
- TfL to engage with operators and telematics supplier to help progress eco-driving trials

Mayor of London's River Passenger Service Concordat Group

Title: Management Reporting

Lead: Andy Griffiths
General Manager
London River Services
Transport for London

Summary:

- Provide common matrix for measuring passenger traffic on the Thames in London
- Provide data to the group on passenger numbers and customer market

Progress update:

- The group agreed that the number of passengers boarding should be the base data
- A trial has been completed by Thames Clippers to gather the data automatically using Thames AIS
- Order placed with Dolphin Maritime Software Ltd to develop and install passenger counting system
- Passenger counting system delivered and most issues resolved

Issues/challenges:

- Some operators have not yet agreed that LRS may have access to their passenger data
- Some operators do not have a maintenance contract for their AIS equipment

Next steps:

- New charter licences from 1 April 2012 for use of LRS piers will be conditional on agreement to access passenger data
- Passenger counting system live from 1 April 2012 and will be run in parallel with existing counting methods for at least 12 months

Mayor of London's River Passenger Service Concordat Group

Title: Boatyards

Lead: Kevin Reid
Principal Programme Manager
GLA

Summary:

- In order to continue to operate current services efficiently and to enable further expansion, London needs to have suitable facilities to inspect, maintain and repair boats. These facilities are in short supply and where they remain are under pressure from higher value land uses – typically for residential development.
- This means that a number of the current vessels go to boatyards outside London, some have even been over to Europe.
- The concordat group will work to establish what facilities would be required and where the opportunities for implementing them may be.

Progress update:

- The problems with the Bay Wharf relocation of London's current largest boatyard – Thamescraft Dry Docking – are intensifying. The developer (London and Regional) continues to refuse to stick to their previous commitment to relocate the boatyard operation. This comes despite letters and phone calls from the GLA.
- The London Riverside Opportunity Area Planning Framework identifies the potential for a new boatyard in Barking & Dagenham or Royal Docks area in Newham.
- There may also be an opportunity to integrate a new boatyard with the proposals for a new Gallions Reach Ferry that the Mayor is currently consulting on.

Issues/challenges:

- There is now an urgent need to resolve the Bay Wharf/Thamescraft Dry Docking situation.

Next steps:

- Convene a sub group meeting to determine more precisely the required facilities to meet the range of operator requirements.

GREATER LONDON AUTHORITY

Mayor of London's River Passenger Service Concordat Group

Title: Pier and Vessel Planning

Lead: Roger Flitter
Passenger Boat Association

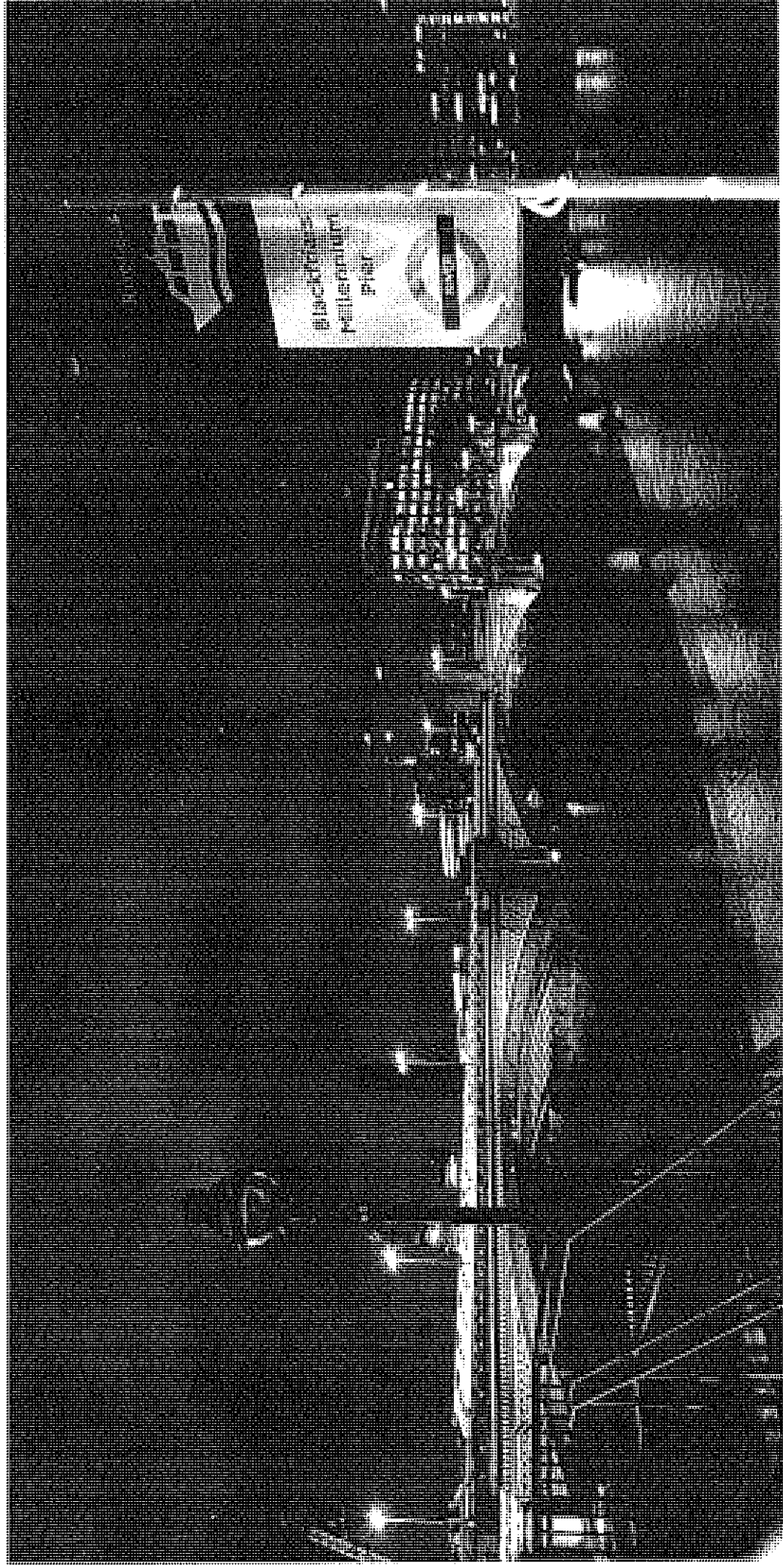
Summary:

- To predict likely demand for private and charter traffic during the 2012 Games.

Progress update:

- All piers have now been surveyed and a booklet on facilities and procedures for visiting London by boat during the 2012 Games has been produced.
- An update to the 2012 Olympic River Services Guide is planned for April 2012. Pier changes and corrections are currently being collected and collated. The Port of London Authority has agreed to publish the document. The Passenger Boat Association will continue to be the custodians of the document up to and including the Olympic period after which a new custodian will be required. The document has been well received by a number of organisations and companies.

Improving London's pier network

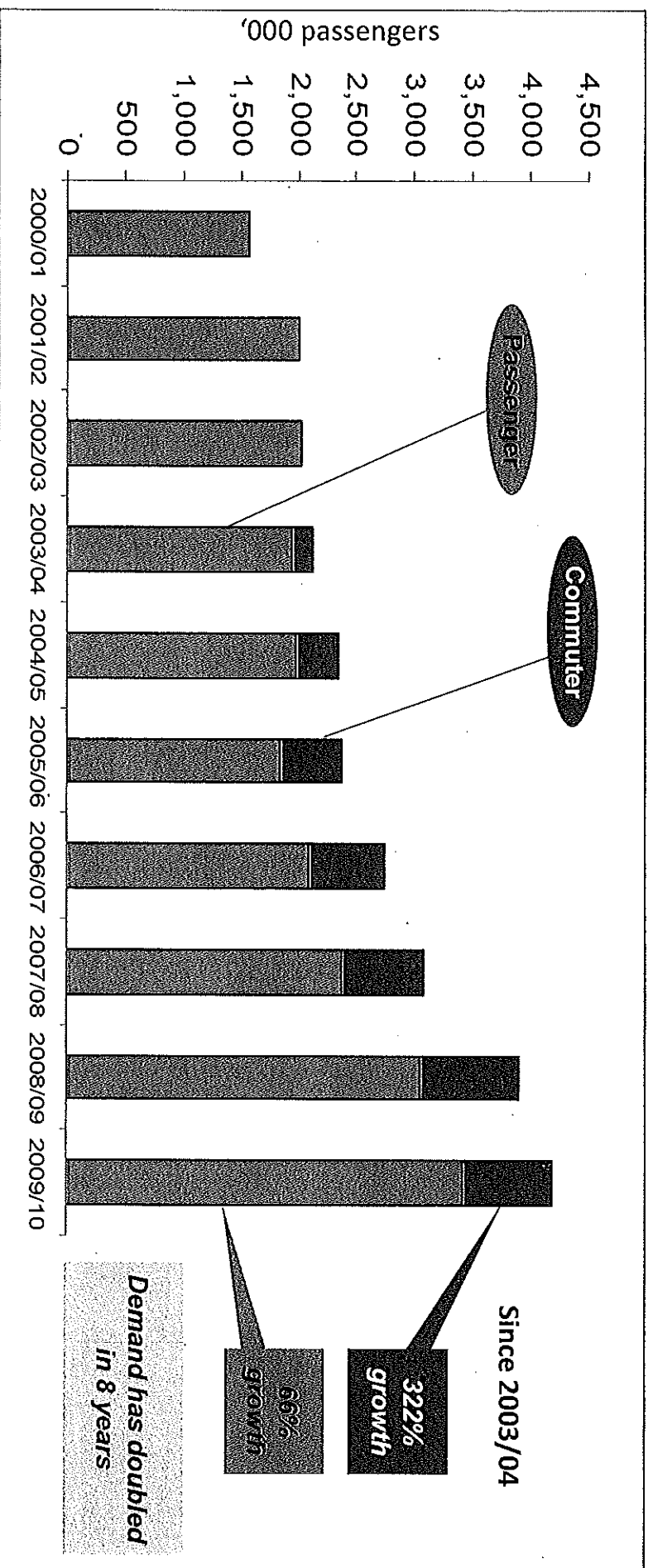


Mayor's River Passenger Service Concordat

GREATER**LONDON**AUTHORITY

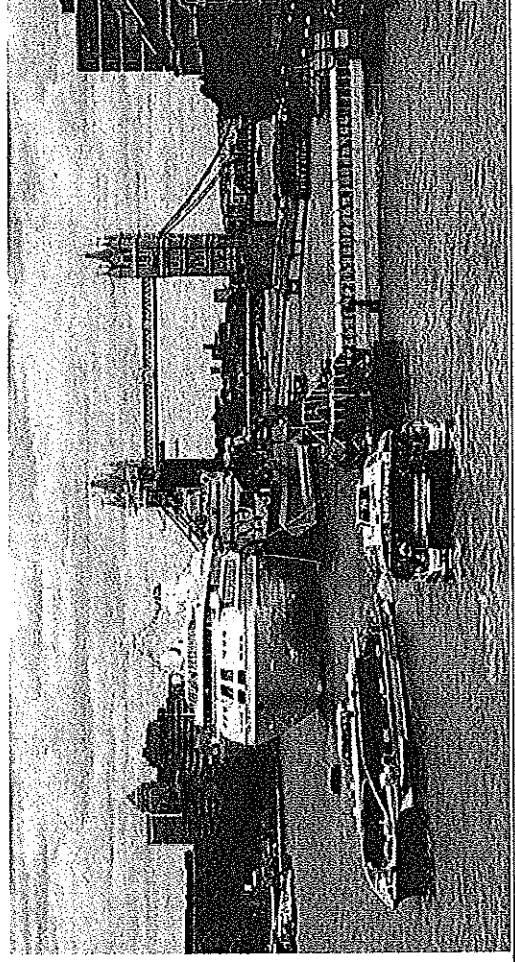
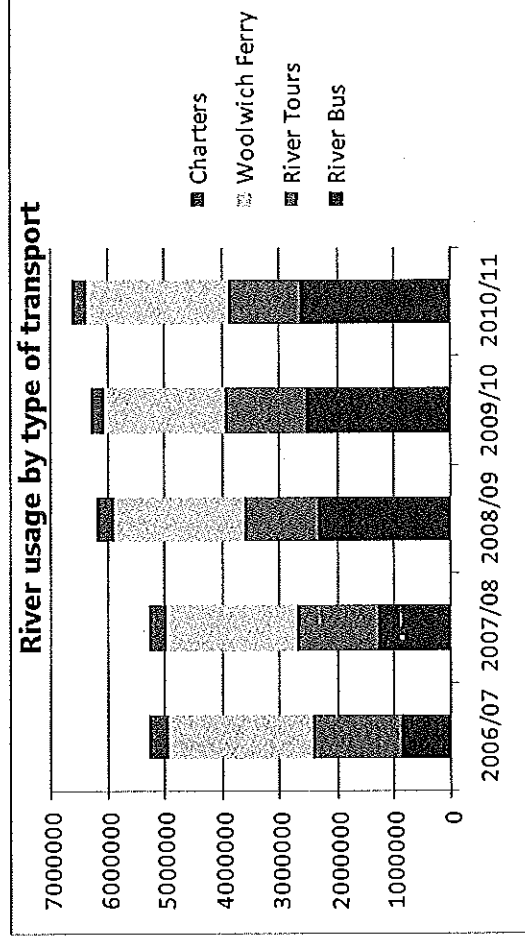
Historic usage of the River Thames

- Growth seen across both River Bus and River Tours, charter market remains steady
- Commuter market driven mainly by service improvements and expansion in 2005/06
- Leisure market driven mainly by tourist numbers in London and improved service standards.



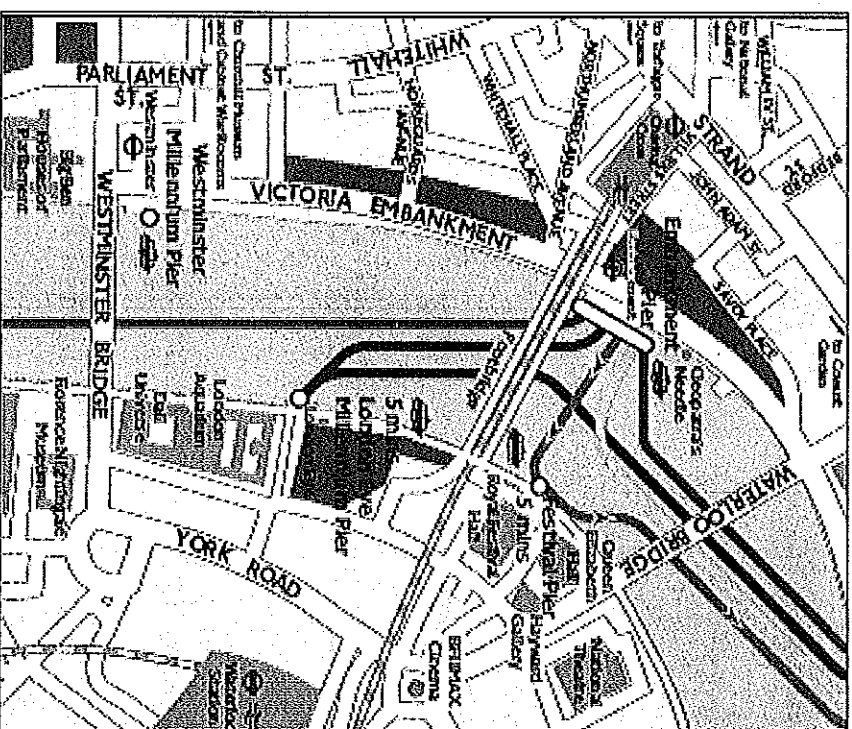
Pier capacity – why expand?

1. Sustained growth in demand for passenger services
2. Limited capacity for services in Central London
3. Gaps in the network outside of the central section



Pier capacity – what are the key issues?

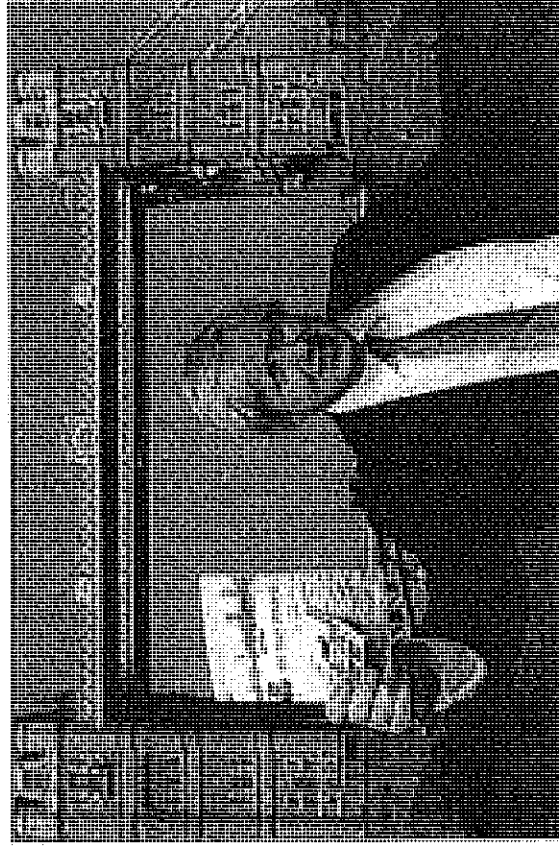
1. Many different owners / operators – inconsistent network
2. No dedicated funding stream



Mechanisms for driving the issues forward

Mayor of London: *'I believe that by working together we can increase pier capacity by 20 per cent by the end of 2012, securing the Thames' reputation as an integral part of London's transport network.'*

1. The Mayor's River Concordat Group
 - Pier workstream
 - Pier plan
2. Public and political appetite for increased use of the river
3. Momentum of the 2012 games and Queens Diamond Jubilee
4. Private investment in new and improved pier infrastructure



100

$$\left. \begin{array}{l} \text{ } \end{array} \right\}$$

100

TfL have recently installed a new roof on Greenwich Pier.

CENTRAL ZONE

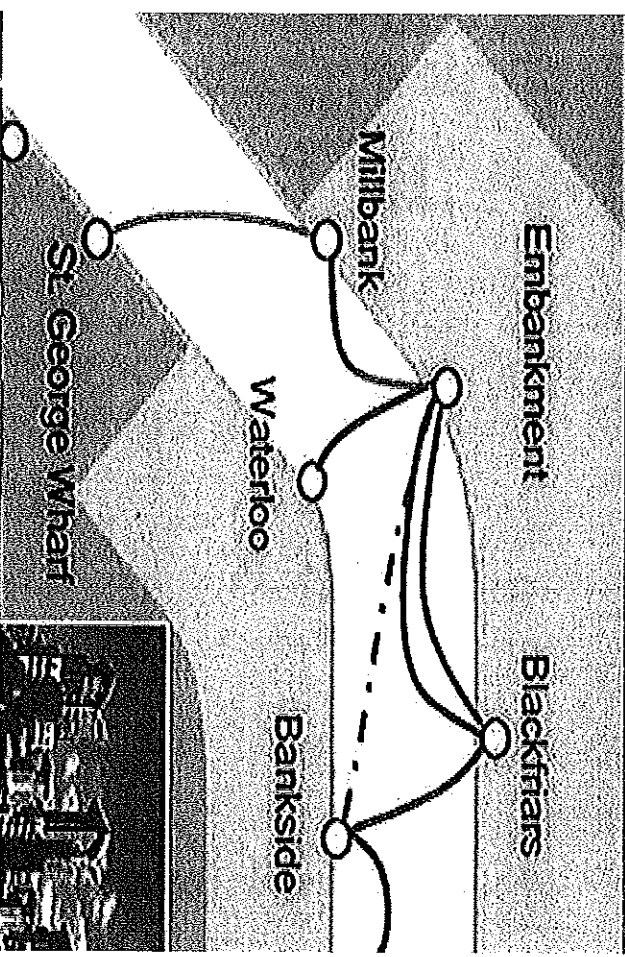
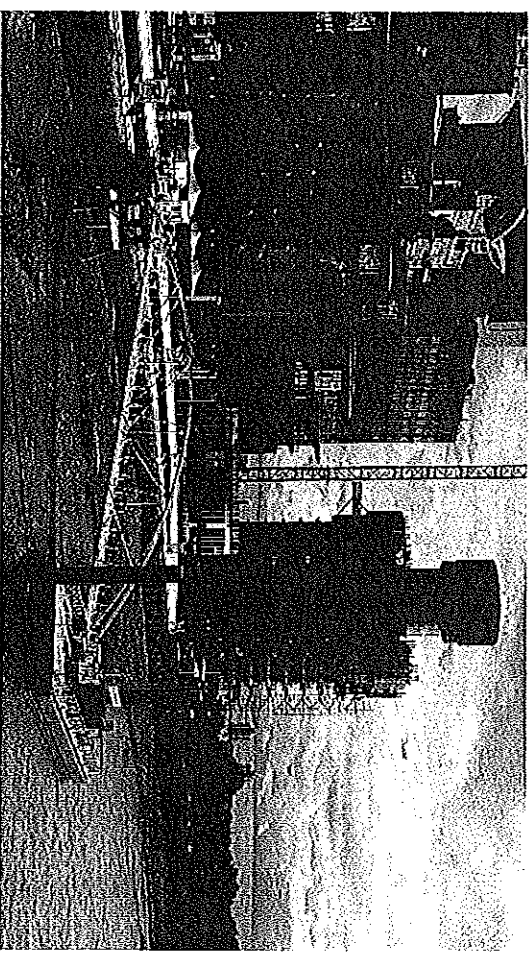
What are we hoping to achieve?

- An increase in pier capacity at bottlenecks in the central section of the river and new piers at key locations outside of the central section
- Provide the infrastructure needed to help facilitate the expansion of both River Bus and River Tours service
- Improved layout and ticketing on piers to assist with more efficient loading and unloading of passengers, address milling issues at key piers
- This would help achieve a 20 per cent increase in pier capacity and additional 500k people using the river
- Support expansion of service through other Concordat workstreams

Increasing pier capacity (1)

St George Wharf Pier

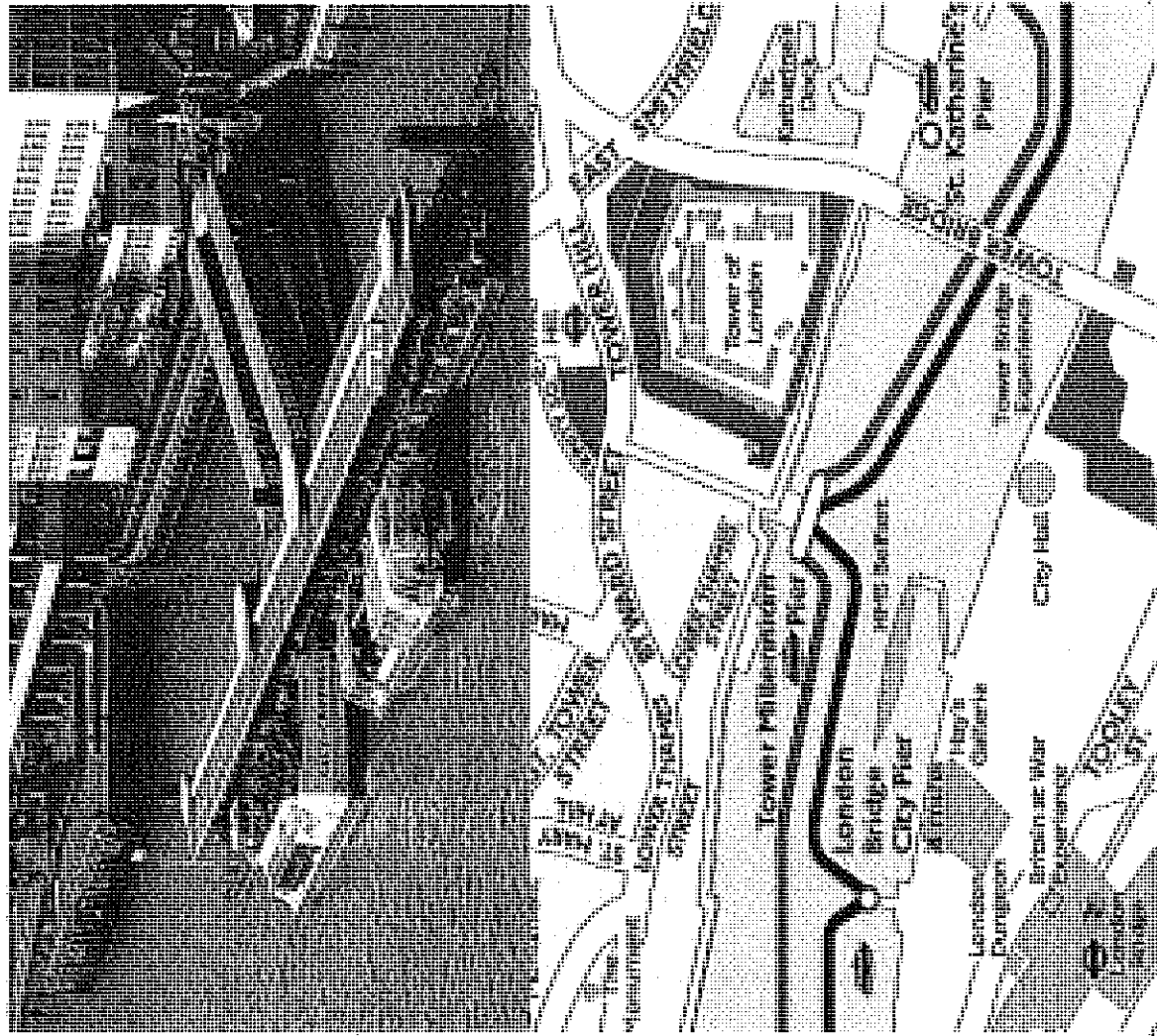
- Opened by the Mayor in September 2011
- £1.7 million new pier has been entirely funded by the developers
- First new public passenger pier that has been added to the river network for eight years
- Supported through signage, flag at pier, customer information
- Served by Thames Clippers who are operating a river bus service - extending the River Bus network further west to Vauxhall.



Increasing pier capacity (II)

Tower Pier

- Acquired by LRS in 1999 from the Port of London Authority.
- Serves River Bus, River Tour, and Charter services
- One of the busiest and most congested piers on the network
- Key for 2012 services
- TfL and the ODA are investing £1.5 million in extending Tower Pier.
- A new 30m pontoon will be installed for use in March, adding an additional 25% capacity to one of London's most strategic piers.



1. The first part of the document is a title page. It contains the title "The Role of the State in the Development of the Economy" and the author's name "John Doe".

2. The second part of the document is an abstract. It summarizes the main points of the paper, including the role of the state in the development of the economy.

3. The third part of the document is the introduction. It discusses the importance of the state in the development of the economy and the role of the state in the development of the economy.

4. The fourth part of the document is the main body of the paper. It is divided into several sections, each discussing a different aspect of the role of the state in the development of the economy.

5. The fifth part of the document is the conclusion. It summarizes the main findings of the paper and discusses the implications of the findings.

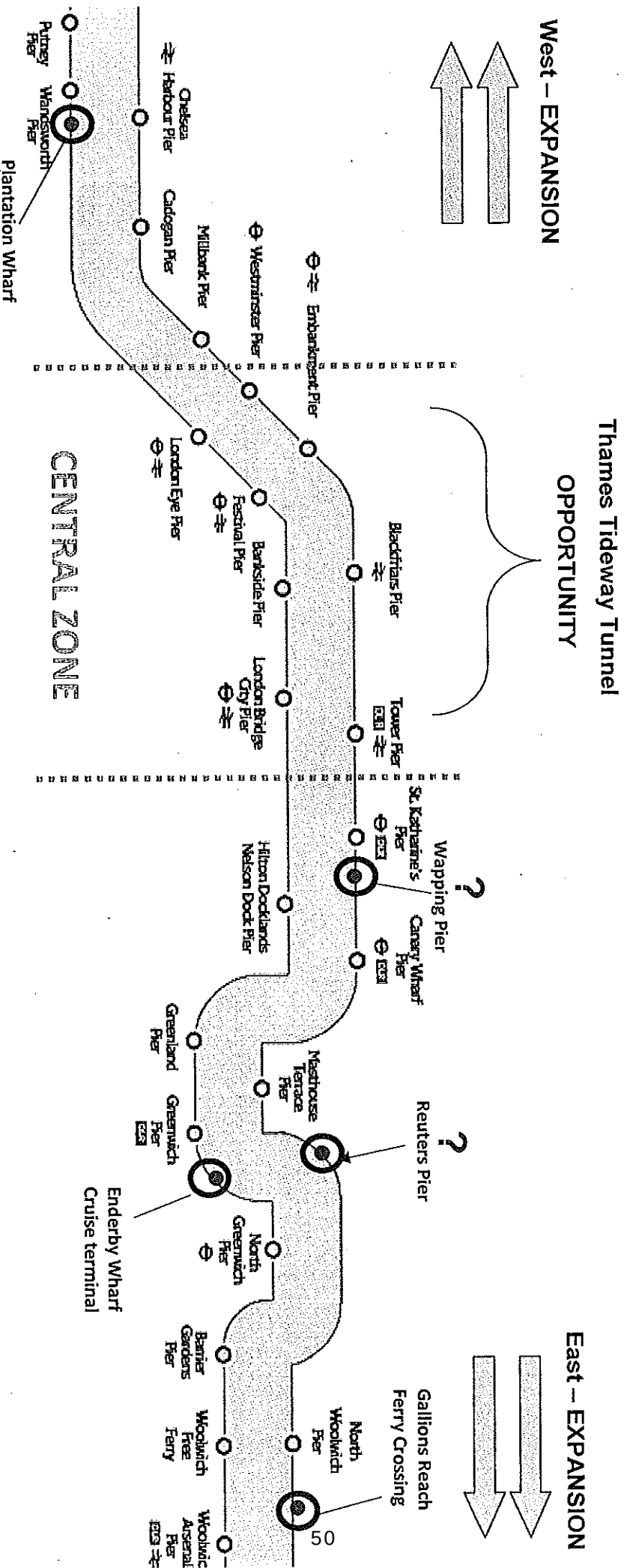
6. The sixth part of the document is the bibliography. It lists the sources used in the paper.

7. The seventh part of the document is the appendix. It contains additional information related to the paper.

8. The eighth part of the document is the index. It lists the topics covered in the paper.

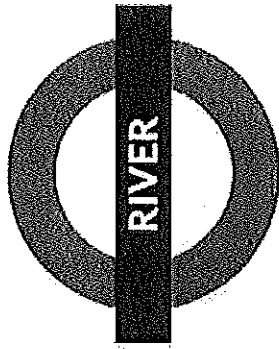
9. The ninth part of the document is the table of contents. It lists the pages of the paper.

10. The tenth part of the document is the cover page. It contains the title and author's name.



Next steps

- Agree a strategy for the development of the pier network (2 / 5 / 10 / 20 years?)
- Opportunities to improve the ‘look and feel’ of the pier network – visibility, consistency and accessibility
- Investigate opportunities to fund new / improved pier infrastructure (borough, S106, sponsorship?)
- Further integrate river into the wider transport network (customer information, marketing, signage, future ticketing etc)
- Work together with partners to make this happen



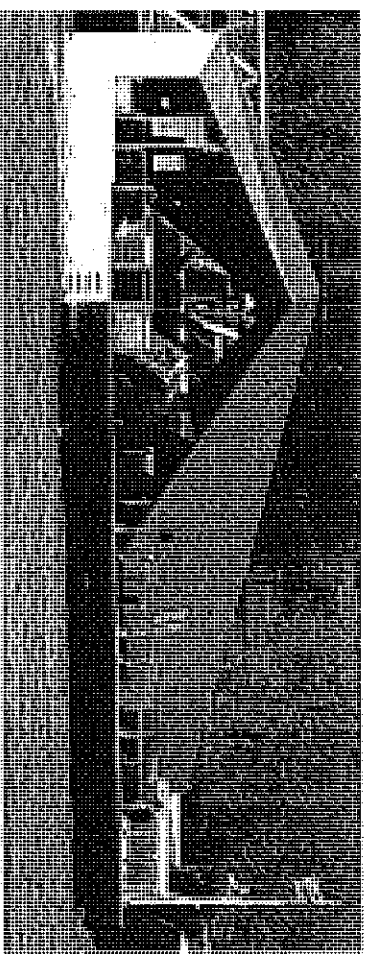
London River Services Limited

Past, Present and Future

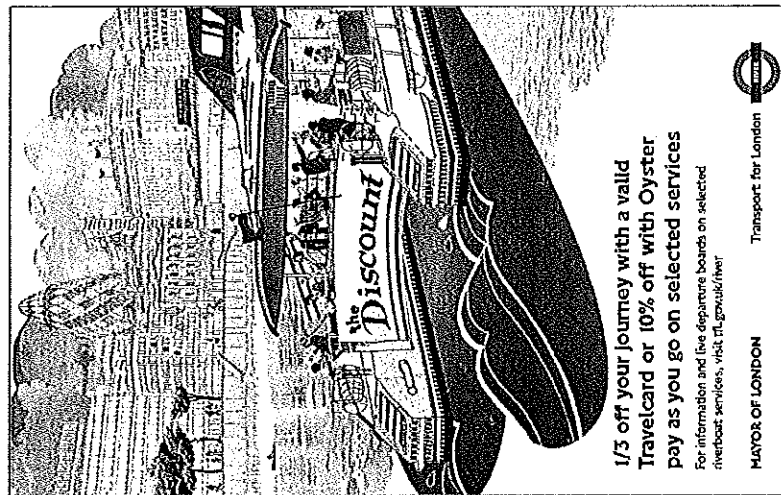


Past

- 1997: PLA transferred pier ownership to London Transport
- London River Services established as a London Transport department
- LRS licensing system established and industry stability fostered
- Several LRS piers built/ rebuilt around the Millennium
- Ongoing infrastructure improvements such as Greenwich Pier's new roof

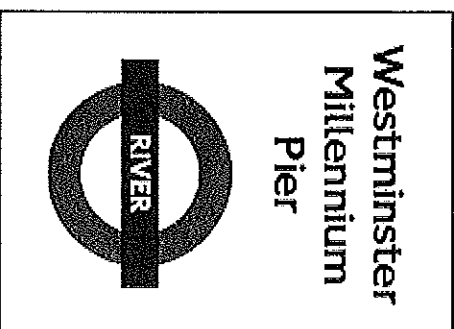
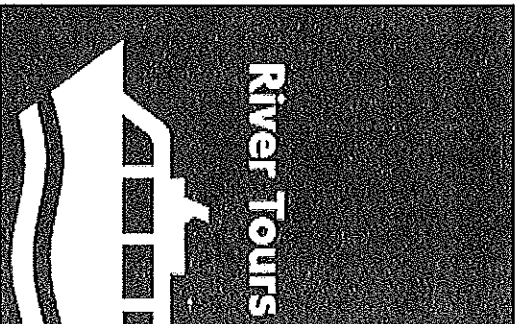


Present: Working for the river

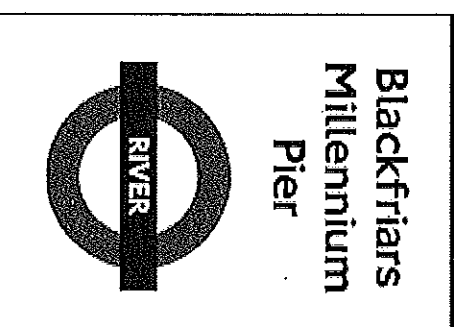
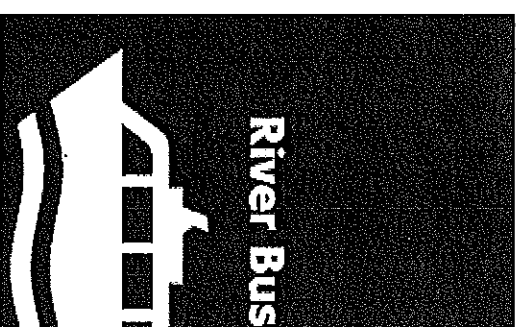


- Owns and operates 8 passenger piers; contracts Serco to operate Woolwich Ferry
- Promoting integration of river travel with rest of London's transport e.g. ticketing, real-time information
- Working to improve health & safety on passenger services
- Subsidising peak hour River Bus services
- Key member of River Concordat

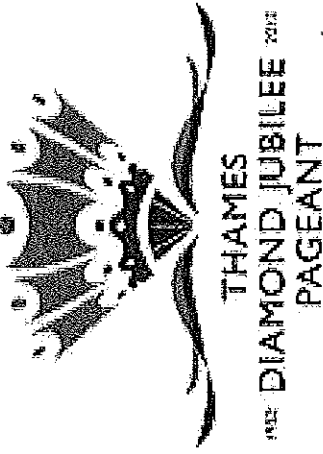
Present: Working for the river



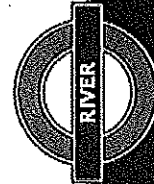
- Promoting river services to TfL's travelling audience: press releases, campaigns, leaflet, website
- Working to make river travel accessible to all
- Developing the new passenger counting system
- Investing in life-extension works for the Woolwich Ferry



Present: London 2012



- Tower Pier extension
 - 30m pontoon for Tower Pier by March
- Introduction of new signage at LRS piers
 - Will increase visibility of piers and services
- Thames Diamond Jubilee Pageant
 - One of the largest flotillas ever gathered on the river
- Olympic and Paralympic Games
 - River transport is key for access to River Zone venues



Greenwich Pier



Future

- Further integrate river travel with rest of London's transport network
- Promote & support development of river services to generate increased passenger numbers
- Project to replace the Woolwich Ferry
- Develop real-time departures information system
- Investigate third party funding & sponsorship opportunities
- Further work with land developers to increase river travel opportunities
- Investigate contactless ticketing

Future

A change in leadership:

- A London Transport Bus Operations Area Traffic Controller was assigned to manage the transfer of the PLA's piers and establish a new department. He is now retiring



Thames Clippers information on passenger numbers and subsidy as provided by the Mayor's Ambassador for River Transport, 22 February 2012

1	<u>13/11/11 - 10/12/11</u>	4 weeks		
			Subsidy	Pence Per pax
	<i>Weekday Peak</i>	48,465	£30,812	£0.64
	<i>Weekday Off peak</i>	38,613		
	<i>Weekends Off peak</i>	54,412		
	<i>Total passengers</i>	141,490	£30,812	£0.22
2	<u>24/07/11 - 20/08/11</u>	4 weeks		
			Subsidy	Pence Per pax
	<i>Weekday Peak</i>	82,165	£30,231	£0.37
	<i>Weekday Off peak</i>	106,959		
	<i>Weekends Off peak</i>	99,477		
	<i>Total passengers</i>	288,601	£30,231	£0.10
3	<u>09/01/11 - 07/01/12</u>	52 weeks		
			Subsidy	Pence Per pax
	<i>Weekday Peak</i>	773,632	£393,000	£0.51
	<i>Weekday Off peak</i>	797,516		
	<i>Weekends Off peak</i>	953,166		
	<i>Total passengers</i>	2,524,314	£393,000	£0.16

Notes

Passenger numbers are collated on a 4 weekly basis

Passenger numbers are collated by day part below;

Weekday Peak 0600-1000, 1630-1930

Weekday Off peak 1000-1630, 1930-close

Weekends Off peak

Subsidy is awarded as a contract payment for peak period

Each example above, **by way of comparison**, illustrates subsidy per passenger if applied to peak period **or** for entire day

1 Nov 2011 - Dec 2011

A higher subsidy per passenger due to seasonality - a low 4 weeks for passengers carried

2Jul 2011 - Aug 2011

A lower subsidy per passenger due to seasonality - a high 4 weeks for passengers carried

3Nov 2011 - Jan 2012

Subsidy per passenger for each day part on an annual basis