

## Investigation into bus services in London

### Transport Committee

#### Introduction

The London Assembly's Transport Committee is investigating bus services in London with a focus on changes in demand for bus travel and how Transport for London (TfL) reviews and redesigns bus services to meet changing demand.

#### Aim of investigation

The purpose of this investigation is to explore current and future demand for bus services and TfL's response to it.

This investigation could have an impact by generating a new public understanding of demand for bus services and a public interrogation of how TfL plans, reviews and changes bus services in London to meet demand.

The investigation could provide a formal, public way for people to express their views and influence TfL's approach to planning bus services and persuade the Mayor and TfL to take different actions on future bus service provision.

#### Terms of reference

The terms of reference for this investigation are:

- To identify the current and potential future usage of the bus network including crowding levels on bus routes;
- To explore how TfL reviews, redesigns and implements changes to bus services to meet changing demand; and
- To make recommendations to the Mayor and TfL on any actions they could take to improve the provision of bus

services to meet current and future demand more effectively.

#### Background

##### *Overview of bus services in London*

Buses are TfL's most popular service. Each weekday, 7,500 buses carry more than 6 million passengers on more than 700 different routes in the capital.<sup>1</sup> Buses account for nearly twice as many trips as the Tube. Almost half of all Londoners use buses at least two days a week with those on low incomes most likely to use buses.<sup>2</sup>

London's bus network is unique in England because it is regulated. TfL plans, procures and manages the network of bus services which are operated by around 20 privately owned companies. Each year up to a fifth of services are re-tendered, with around half of the network subject to some form of review.<sup>3</sup>

##### *The success of London's bus network since 2000*

Over the last decade, London's bus network has expanded and its performance improved. Since 2000/01 there has been a 31 per cent increase in bus kilometres operated and a decrease

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<sup>1</sup> TfL website - [link to report](#)

<sup>2</sup> Transport Committee, The future of London Buses report, 2010

<sup>3</sup> TfL, London's Bus Contracting and Tendering Process, 2009 ([link to document](#))

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in average excess waiting time from 2.2 minutes to 1.1 minute. Demand for bus travel has grown and customer ratings improved. Since 2000/01 the total number of bus trips grew by 60 per cent and customer satisfaction rose from 75 to around 80 out of 100.<sup>4</sup>

London's bus network compares well to bus services elsewhere. It has been ranked top when benchmarked against bus services in world cities such as New York and Paris. Some have described London's buses as "one of the capital's greatest success stories" with the network considered "world class, in size, frequency of service, reliability and accessibility."<sup>5</sup>

Many factors may account for the success of the bus network including investment. The annual operating subsidy for bus services rose from £41 million in 1999/2000 to £653 million in 2007/08.<sup>6</sup> Since then the annual operating subsidy has reduced. In 2012/13 TfL spent around £1.8 billion operating the bus network of which £1.4 billion (77 per cent) is funded by fares and the remaining £400 million (23 per cent) by the bus subsidy.<sup>7</sup>

### *The future challenges for London's bus network*

In future there will be growing demand for bus services but no expansion of the bus network. Between 2012/13 and 2014/15 TfL expects bus passenger journeys to rise from 2.38 billion p.a. to 2.45 billion p.a.<sup>8</sup> but its current business plan does not

provide for more bus services. The number of bus kilometres operated will remain at the 2012/13 level (491 million p.a.). TfL's annual direct bus subsidy will remain at around £400 million p.a.<sup>9</sup>

TfL acknowledges the challenge of growing demand for bus travel but no growth in the bus network. In December 2012, Sir Peter Hendy, Commissioner of TfL, told the Committee that in future TfL will have to be smarter about how it plans bus services and uses the existing network especially where "it puts its last few vehicles in peak periods." He suggested this would not be easy to do and average bus occupancy would rise from around 17 passengers at present.<sup>10</sup>

TfL also faces a challenge of modernising the bus fleet to reduce its impact on air quality. TfL has reported that it is now undertaking a "range of measures to make London a world leader" in clean bus technology including increasing the number of hybrid buses.<sup>11</sup>

This investigation will provide an opportunity to explore the implications of increasing demand for bus travel without any growth in the bus network. The Committee will seek to identify the busiest bus routes now and in the future and how TfL is responding to the challenges facing the bus network, drawing on international and national comparisons.

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<sup>4</sup> TfL, Travel in London Report 5, [link to report](#)

<sup>5</sup> London's Transport: progress and future challenges, Siemens report, March 2013, p62

<sup>6</sup> KPMG, Independent strategic review of the provision of bus services in London, 2009, p. 14

<sup>7</sup> TfL Business Plan 2012, p55

<sup>8</sup> TfL Business Plan 2012 p 27 [link to plan](#)

<sup>9</sup> TfL Business Plan, December 2012, p55 [link to plan](#)

<sup>10</sup> Transcript of Transport Committee meeting on 5 December 2012, p14

<sup>11</sup> TfL Business Plan, December 2012, p40 [link to plan](#)

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### *TfL's approach to planning and reviewing bus services*

TfL has a set process and guidelines for planning and reviewing bus services.<sup>12</sup> Reviews happen all the time as contracts for bus services are re-tendered. TfL also participates in land use planning processes to review the impact of new developments and infrastructure on bus services. In reviewing the need for any changes to bus services, TfL deploys an established cost/benefit analysis approach and also considers other issues that cannot be readily quantified.

TfL is required to consult on any changes to bus services. These include: changing routes; introducing new routes; changes to bus types (e.g. from single-decker to double-decker); and operational hours and frequencies. TfL consults via online questionnaires.<sup>13</sup> TfL also liaises with every London Borough regularly about bus services in their area.

This investigation will provide an opportunity to explore how TfL plans, reviews and changes bus services in the context of rising demand for bus travel. It will provide an opportunity to examine TfL's bus service consultation processes.

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<sup>12</sup> The guidelines are available online ([link to guidelines](#)) More details of process available in the KPMG report that the Mayor commissioned in 2008 – [link to report](#)

<sup>13</sup> TfL bus consultations online [link](#)

### *Issues about bus service provision in London*

Some have called for changes in bus service provision in London.

- London Councils has called for the introduction of orbital bus routes to provide for more people to make journeys around outer London without travelling into the centre and more express bus services for quicker journeys.<sup>14</sup> In his 2008 manifesto, the Mayor promised to trial express orbital bus routes in outer London.<sup>15</sup>
- London TravelWatch has highlighted a range of issues including: the need to prioritise buses; improve consultation with bus users; market bus services to non-bus users; convert hail and ride services to conventional bus services; and TfL giving greater value to certain bus journeys over others in its planning process i.e. bus journeys to major health centres and hospitals.

A long-standing issue is adequate bus services to healthcare facilities in the capital. TfL is actively involved with the NHS bodies across London so they take into account transport data (travel times) when planning health care provision. London TravelWatch has also considered this issue in the past. In 2012, the Assembly's former Health & Environment Committee discussed access to healthcare, including hearing from TfL about bus services at hospitals, as part of its work on NHS reforms in the capital.<sup>16</sup>

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<sup>14</sup> London Councils' response to the draft replacement London Plan, 2010

<sup>15</sup> Boris Johnson, Getting Londoners Moving, 2008

<sup>16</sup> Health & Environment Committee meeting on 12 December 2012

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This investigation will provide an opportunity to hear from organisations and individuals about issues relating to bus service provision. The Committee will seek views on, and experiences of, crowding on bus routes and TfL's bus planning and review process including any suggestions for improvements in the context of rising demand for bus travel.

#### *The Mayor's position on bus service provision*

The Mayor's Transport Strategy (2010) sets out his aspiration to "produce a more efficient bus network responding to changing demand".<sup>17</sup> The Strategy suggests that the bus network must develop "in such a way as to cater for the overall shape and scale of growth across London". Proposal 23 in the Strategy provides for the Mayor, through TfL and working with others to keep the development of the bus network under regular review, including reviews of the strategic priorities underlying the process approximately every five years, to ensure the network caters for growth in population and employment, while maintaining ease of use, attractive frequencies and adequate capacity.<sup>18</sup>

In 2008 the Mayor commissioned a review of bus services from KPMG. This followed an earlier strategic review *The case for investing in London's buses* produced by the previous Mayor in 2003.

This investigation will provide an opportunity to explore how the Mayor is delivering his commitment to keep the bus network under regular review to ensure it caters for growth in demand while maintaining adequate capacity. The investigation will take into account relevant past strategic reviews of bus services where appropriate.

#### *Relevant past Assembly work on bus services*

The Transport Committee's investigation will build on the Assembly's considerable past work on bus services including the Transport Committee investigations listed below.

- *The Future of London Bus Services* (January 2010). This report followed a seminar on the role of London's bus services in light of the Mayor plans to reduce the direct bus subsidy and the KPMG review.<sup>19</sup>
- *Streets Ahead* (February 2010). This report followed a rapporteurship investigation by Victoria Borwick AM about congestion in the Oxford Street area.
- Pre May 2008 the Transport Committee produced various reports on London's buses including *Value added?* - an assessment of whether bus contracts represent value for money (March 2006).

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<sup>17</sup> Mayor's Transport Strategy (May 2010), p275

<sup>18</sup> Mayor's Transport Strategy (May 2010), p142

<sup>19</sup> Transport Committee, *The future of London's buses*, January 2010, p. 7

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#### *Questions for the investigation*

During the investigation the Transport Committee will seek to answer the following key questions:

- What are the most crowded bus routes in London? What will be the most crowded bus routes in future?
- How does TfL plan, review, redesign and implement changes to bus services to meet changing demand? Are there any issues with its approach?
- How are the Mayor and TfL meeting the growth in demand for bus travel without any expansion of the bus network?
- What, if any, other actions could the Mayor and TfL take to improve the planning and provision of bus services now and in the future to meet demand more effectively?

#### *Details of the investigation*

The Committee will seek written submissions and hold two public meetings to gather views and information for this investigation.

The Committee will invite contributions from a wide range of organisations including:

- The Mayor
- TfL;
- Bus service operators in London, UK and abroad;
- London TravelWatch;

- London Councils;
- London Boroughs;
- Passenger Focus;
- NHS;
- Public transport user groups;
- Resident groups; and
- Transport academics and commentators.

The Committee will seek Londoners' views on crowding on bus routes and bus service provision in writing and at a public meeting.

The Committee will use its first meeting on 6 June 2013 to hold a 'open microphone' session with members of the public and relevant organisations so they can share their views and experiences.

The Committee will use its second meeting on 2 July 2013 to hear from representatives of the Mayor/TfL and bus service experts drawing on the findings from its first meeting.

Following its public meetings, the Committee will publish its findings and recommendations.

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### *Timetable for the investigation*

This investigation will take place from May 2013 to October 2013. The stages in the investigation will include:

- Agreement of terms of reference: 21 May 2013
- Desk-based research/gather written views and information: May – October 2013
- Formal meetings: 6 June and 2 July 2013; and
- Produce findings: By October 2013.

### **How to contribute to the investigation**

The Transport Committee welcomes written views and information to inform its investigation. Written submissions should aim to address the questions outlined above.

Please send written submissions to Ross Jardine, London Assembly, City Hall, The Queen's Walk, London SE1 2AA, or email: [ross.jardine@london.gov.uk](mailto:ross.jardine@london.gov.uk)

The Committee would welcome receiving written submissions to inform its investigation. It would be helpful to receive any initial written submissions, however brief, by **Friday 31 May 2013** so they may be used to inform the Committee's meeting on 6 June 2013. However, the Committee will also accept written submissions provided after this date up until the end of August 2013.

### **About the Transport Committee**

The Transport Committee examines all aspects of the capital's transport system in order to press for improvements for Londoners. The Committee pays particular attention to how the Mayor's Transport Strategy is being implemented, and the work of TfL.

The membership of the Transport Committee and details of its work are available on its [website](#)

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