

Bus services in London

October 2013



Transport Committee Members

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Victoria Borwick	Conservative
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At its meeting on 21 May 2013, the Transport Committee agreed to carry out an investigation into bus services in London with the following terms of reference:

- To identify the current and potential future usage of the bus network including crowding levels on bus routes;
- To explore how Transport for London (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.

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Chair's foreword

Buses are London's universal mode of public transport. Many Londoners rely on buses to make trips to work, shops, hospitals and schools. This may be self-evident but the importance of the bus network is not always apparent in the Mayor and TfL's transport policies and proposals.



In future more Londoners may want to travel by bus but the Mayor and TfL have no plans for major expansion of the bus network to meet rising demand. In the decade to 2011/12, London's population grew by 80,000 a year and the number of bus kilometres operated by 109 million. In the period to 2021/22, London's population is forecast to grow by around 100,000 a year but bus kilometres operated by just 20 million. There are published plans for addressing growing demand on the rail and Tube networks but no published plan for the bus network.

We have investigated rising demand for bus travel and how it is affecting bus users. Our findings include results from our survey of over 1,000 bus users which show nearly three-quarters find their bus route busy or overcrowded. As demand for bus travel rises, crowding could worsen. Many more Londoners may experience long waits at bus stops to board a bus that is not full or find they have to stand on boarding.

This is not the first time that we have explored the future of London's bus service. In 2009 we held a seminar following the Mayor's proposals to reduce the subsidy – or amount of government grant – used to fund the buses. This report builds on that work. It shows that the debate about bus subsidy can be misleading. On a total expenditure basis the bus is as cost effective as the Tube. Moreover, far more concessionary fare holders travel on buses than on the Tube, distorting bus income levels.

We recommend the Mayor and TfL make clear how they will address rising demand for bus travel by publishing a strategy for the long-term development of the bus network. We also want to see other actions taken to maintain an effective bus network including changes to bus service planning. This investigation has highlighted the possibility for further work on making the bus fleet more environmentally friendly.

We would like to thank everyone who has contributed to our work.

Valerie Shawcross AM, CBE, Chair of the Transport Committee

Executive summary

This report examines the challenge of rising demand for bus travel. A growing number of Londoners want to make journeys by bus but there are no plans for major expansion of the bus service. The Committee shows how improved bus service planning may help to meet the challenge of rising demand and also sets out other actions that the Mayor and TfL should take to maintain an effective bus network.

1. The challenge of rising demand for bus travel

Demand for bus travel in London has grown rapidly since 2000. Between 1999/2000 and 2012/13 the number of bus passenger journeys rose 64 per cent from 1.4 to 2.3 billion. The ten most used bus routes (25, 18, 29, 149, 38, 207, 5, 73, 86 and 243) illustrate this growth in demand. Route 25 is the most used route in London with 64,000 passengers per day; 64 per cent more than in 2002/3.

Bus passengers are noticing growing demand. They report waiting for long periods at bus stops for a bus that is not full or not being able to find an empty seat once on board. The Committee's survey of over 1,000 bus users shows nearly three-quarters think their bus is busy (47 per cent) or overcrowded (26 per cent). The survey respondents highlighted the following ten routes in particular for busyness or crowding: 185, 208, 96, 38, 176, 172, 484, 336, 162 and 358.

TfL predicts further growth in demand for bus travel of seven per cent between now and 2021/22 – annual growth of around one per cent per year or a total of 167 million more journeys. However, this forecast may be conservative. Between 2000/1 and 2011/12 annual growth in bus journeys was around four per cent. Demand for bus travel is influenced by many factors including population growth. If London's population grows by the forecast 1.2 million between 2011/12 and 2021/22, this is the equivalent of almost four double-deckers full of people each day.

The Mayor and TfL have acknowledged rising demand for bus travel but provided few details of how they will address this. By contrast there are published plans for meeting rising demand on the Tube and rail networks. There is also regular reporting of crowding levels on rail services but no routine reporting of the usage of buses especially in peak periods.

The Committee recommends that the Mayor and TfL demonstrate that they are meeting the challenge of rising demand for bus travel by publishing a long-term strategy for the development of the bus network. They should also devise a performance measure for the busyness of buses, set targets for this measure and report against these regularly.

2. Meeting the challenge through bus service planning

TfL has said it will need to improve its bus service planning to address rising demand. Many organisations including London Councils and London TravelWatch have told the Committee how this could be done.

- There is a widespread perception that TfL only reviews and makes changes to bus services on a route-by-route rather than area wide basis, which fails to take account of all changes in local demand. The Committee recommends the Mayor and TfL should devise a programme for more cross-borough boundary reviews of bus routes and more orbital and express bus routes.
- TfL's rationale for making changes to bus services is not always clear. The Committee finds that TfL should make its 'black box' of decision making on bus services transparent and recommends it devise a new approach to consulting boroughs and Londoners on bus services.
- Many bus users are especially concerned about bus service planning and provision at hospitals. The Committee recommends that the Mayor and TfL should work closely with NHS providers including through the London Health Board to address these concerns.

3. Maintaining an effective bus network

Improved bus service planning alone will not meet the challenge of rising demand. The Committee has identified other actions that the Mayor and TfL will need to take to maintain an effective bus network.

- There needs to be sufficient funding for bus services. The use of government grant – the bus subsidy – dominates the debate about bus funding levels but on a total expenditure basis the bus service is as cost effective as the Tube. More concessionary fare holders also use the bus than use the Tube affecting bus service income levels.
- Introducing different fares and ticketing products including 'early bird', part-time and 'one hour' bus tickets could help to spread demand.
- Road congestion needs to be tackled which may include providing more bus priority measures and tackling traffic pinch points.
- The Mayor and TfL should publish the schedule for rolling-out more environmentally friendly bus vehicles including electric bus vehicles to show how they are addressing the capital's poor air quality.

Introduction

London's bus network is world class. It ranks top for size, frequency, reliability and accessibility when compared to the bus network in other cities including Paris and New York.¹ Each weekday, around 7,500 buses carry more than six million passengers on more than 700 different routes in the capital.² Buses account for twice as many trips as the Tube. Almost half of all Londoners use buses at least two days a week.³ All London's buses are fully accessible.

Yet London's bus network is facing the challenge of rising demand. The number of bus passenger journeys grew by 64 per cent between 1999/2000 and 2012/13 – from 1.4 to 2.3 billion⁴ - and is set to grow further. TfL has estimated a seven per cent increase in bus passenger journeys by 2022; the equivalent of an extra 167 million journeys.⁵ At the same time while there is some proposed growth in bus services there are no plans for major expansion.

The Transport Committee has, therefore, explored how the Mayor and TfL will meet the challenge of rising demand for bus travel. Its investigation has involved gathering views and information through two public meetings, a survey of bus users which received over one thousand responses, three site visits and written contributions from many organisations and Londoners. Further details about the investigation are provided in Appendix 2.

The remainder of this report sets out the Committee's findings and recommendations in three parts. First, the report covers the challenge of rising demand for bus services showing how demand for bus travel has changed and how it may change in future, including revealing the top ten most used bus routes and the ten busiest or most crowded routes from the Committee's survey. Second, the Committee explores how TfL could respond to the challenge of rising demand through changes to its bus service planning process. Finally, the Committee sets out some other actions that the Mayor and TfL should take including changes to fares and ticketing products to ensure London's bus network remains world class.

¹ Siemens, London's Transport: progress and future challenges, March 2013, p62

² TfL website - <http://www.tfl.gov.uk/corporate/modesoftransport/1548.aspx>

³ Transport Committee report, *The future of London Buses*, 2010

⁴ TfL's Travel in London reports as detailed in the technical analysis published with this report

⁵ TfL's written submission, 19 June 2013. Copies of all the written submissions received by the Committee are available online at <http://www.london.gov.uk/who-runs-london/the-london-assembly/publications/transport>

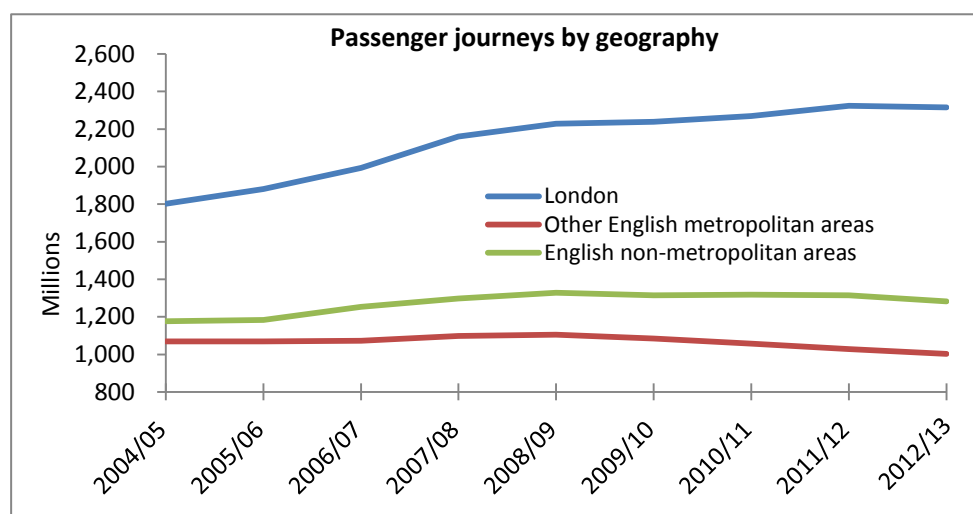
Part 1 – The challenge of rising demand for bus services

Overview

More Londoners want to travel by bus but there are no plans for major expansion of the bus service to meet this increasing demand.

What has happened to demand for bus services in London?

Demand for bus travel in London has grown rapidly since 2000. Between 1999/2000 and 2012/13 the number of bus passenger journeys rose 64 per cent from 1.4 to 2.3 billion.⁶ Such growth in bus patronage is in marked contrast to the rest of England. While bus usage grew by 29 per cent in London between 2004/5 and 2012/13, it fell by six per cent in other English metropolitan areas.⁷ This is shown in the graph below.



The ten most used bus routes in London

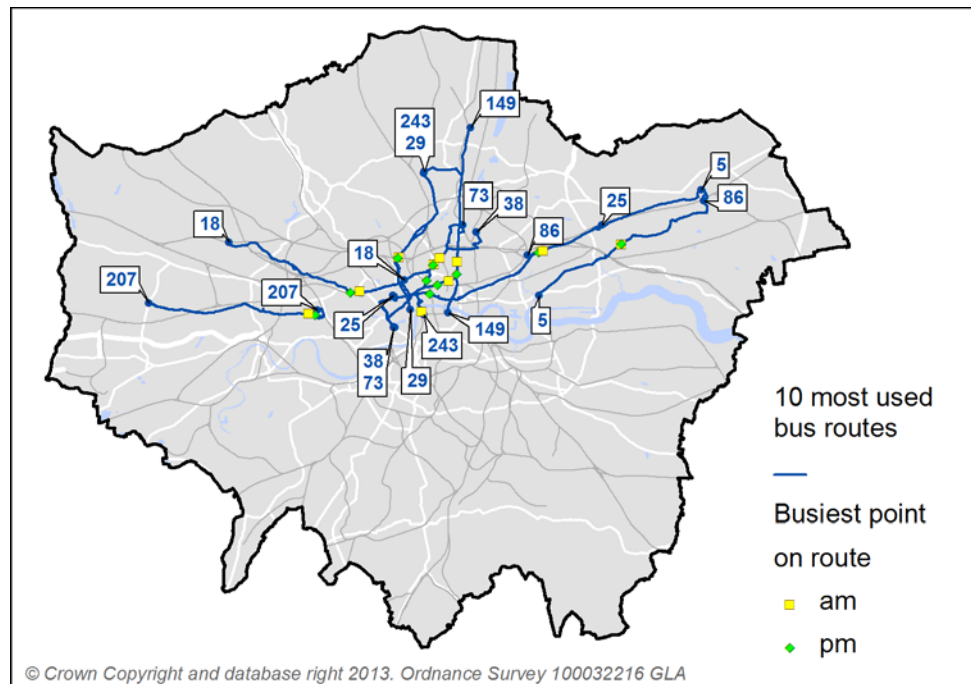
The ten most used bus routes in London illustrate the growth in demand. The map below shows these ten routes (routes 25, 18, 29, 149, 38, 207, 5, 73, 86, 243) and details their busiest point during the am peak and the pm peak periods. Details of how demand has changed on these ten routes are set out in Appendix 3. The most used bus route in London is route 25 between Ilford and Oxford Circus. It carries 64,000 passengers per day; 64 per cent more than in 2002/3 and the equivalent of transporting the entire population of the Emirates stadium each day.

⁶ TfL's Travel in London reports – see technical analysis published with this report

⁷ DfT bus statistics, September 2013 – see technical analysis published with this report

“Bus route 336 has seen a huge increase in the number of passengers – I rarely get a seat on my way into work or home”

- Bus user

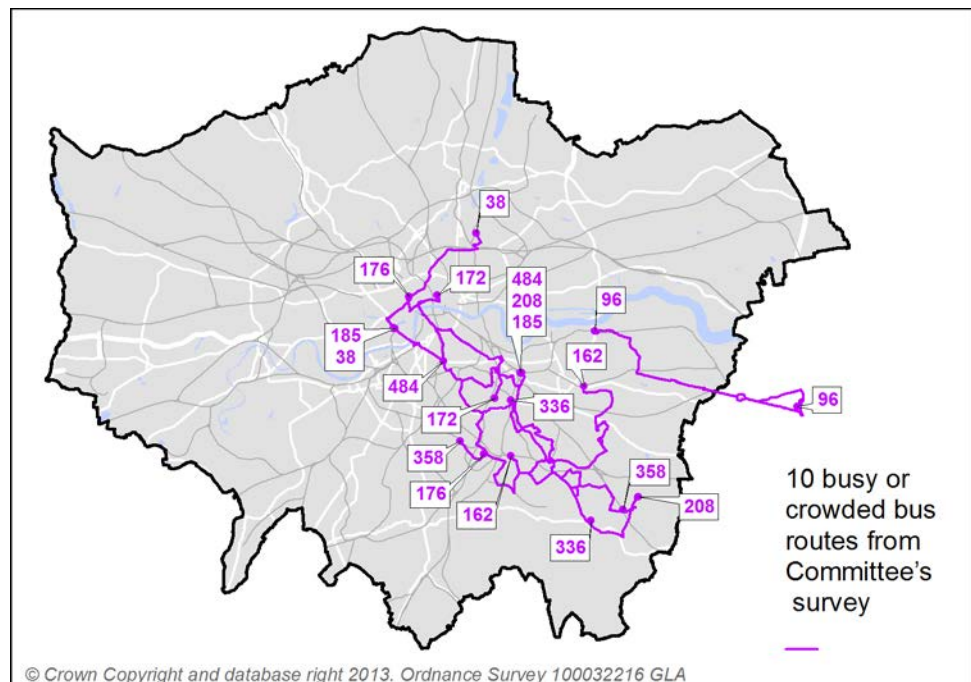


Bus users’ views of the ten busiest bus routes in London

The ten most used bus routes indicate the growth in demand but do not show the busiest or most crowded bus routes. TfL has provided more bus vehicles on the ten most used routes to help meet demand but may not have done so on all other routes resulting in some passengers experiencing busier or overcrowded buses. This is demonstrated in the map below which shows the ten most frequently cited bus routes in the Committee’s survey as busy or overcrowded. More details of these ten routes (185, 208, 96, 38, 176, 172, 484, 336, 162 and the 358) are set out in Appendix 3.

“The 162 is terribly overcrowded. It only runs every 20 minutes Monday to Saturday but it connects key outer London town centres such as Bromley and Eltham – I have seen elderly people falling over on this bus because there is nowhere to sit”

- Bus user



“The 133 in the morning is so overcrowded that you often have to wait for two or three buses to pass by full before you can get on”

- Bus user

The Committee has heard from many bus passengers about busier and more crowded bus routes. Nearly three-quarters of respondents to the Committee’s survey (73 per cent) reported that their bus was busy (47 per cent) or overcrowded (26 per cent). Over half (61 per cent) reported an increase in passengers on their bus over the last 12 months.

Bus passengers have reported having to wait at bus stops for long periods for a bus that is not full and not being able to find an empty seat once on board a bus. Some bus users have highlighted difficulties for passengers using wheel chairs and those with prams and buggies to use the same bus. In the past the Committee has commented that both people with disabilities and parents using prams and buggies should be able to use a bus at the same time. It recommended TfL take more action on this issue. This could include encouraging manufacturers to label their prams and buggies to show if they would fit on buses so people can take this into account when deciding which models to purchase.⁸

How will demand for bus services change in future?

Demand for bus services is set to rise further. TfL predicts a seven per cent increase in bus passenger journeys between 2013/14 and 2021/22 alone – 167 million more journeys. It has not provided detailed year-by-year demand forecasting beyond 2021/22 but suggests demand for bus services is expected to increase broadly in line with the increase in London’s population.⁹ If London’s population grows by 1.2 million between 2011/12 and 2021/22, this is the equivalent of almost four double-deckers full of people each day.¹⁰

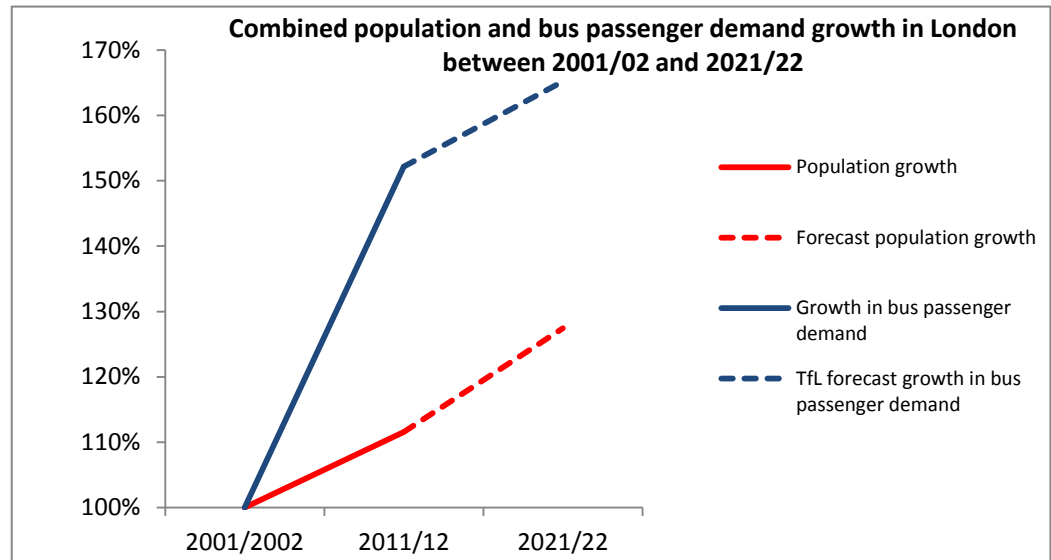
TfL’s forecasts for bus service demand may be conservative. London’s population is forecast to grow by an average of 1.3 per cent per year between 2011/12 and 2021/22 (over 100,000 more people per year) and TfL predicts the equivalent of one per cent growth in bus journeys per year over the same period (over 20 million more journeys per year). By contrast, London’s population grew by an average of 1.1 per cent per year between 2000/1 and 2011/12 (over 80,000 people per year) and there was growth of four per cent per year in bus journeys over this period (over 60 million more journeys per year). The discrepancy in recent and

⁸ Transport Committee investigation into transport accessibility, November 2010

⁹ TfL written submission, 24 July 2013

¹⁰ Based on ONS population projections (http://www.ons.gov.uk/ons/dcp171778_279964.pdf) and capacity of double decker bus which is 87 passengers

future population growth and demand for bus services in London is shown in the graph below.¹¹



Predicting demand for bus services

It can be difficult to estimate demand for bus travel accurately. Alongside population estimates, TfL has to take into account factors such as changes in fares and service levels and the impact of new transport infrastructure e.g. Crossrail which is due to open in 2018.¹² Other factors may also create short-term fluctuations in demand as demonstrated by the 0.4 per cent decline in bus passenger journeys between 2011/12 and 2012/13. TfL explains this was due to a number of one-off factors and the underlying year-on-year growth was around 0.5 per cent.¹³

Despite the difficulty in estimating demand for bus travel accurately, the Committee has heard demand seems likely to grow significantly. London TravelWatch has suggested both a macro and micro dimension to demand for travel. Alongside an overall increase in bus passengers, there could be far higher demand in certain areas of London where there is greatest population growth. Similarly, Professor White of the University of Westminster observed demand for bus travel was often concentrated in particular areas such as busy outer town centres like Croydon, Kingston and Romford or areas with major healthcare and education facilities. Transport for All suggested that, in future, demographic changes and

“Route 8 struggles to cope with peak flows. This is exacerbated by the amount of new housing that has sprung up in Bow and the increasing desirability of the East End as a place to live”

– Bus user

¹¹ Based on ONS population statistics (http://www.ons.gov.uk/ons/dcp171778_279964.pdf) and TfL Travel in London report 5

¹² TfL written submission, 19 June 2013

¹³ The differences included two extra bank holidays, industrial action, the 2012 Games and poor weather as set out in TfL Board report on operational and financial performance, 3 July 2013 p12

government policies focused on encouraging more disabled people to work could result in more Londoners with reduced mobility travelling by bus.¹⁴ Many also noted the potential for latent or “hidden” bus demand; people who have not previously used buses may use a new bus service.

Who uses the bus network and why?

The potential for higher demand for bus travel reflects many Londoners’ reliance on the bus service. More trips are made by bus than on any other mode of public transport. Bus trips account for about 14 per cent of all trips made in the capital whereas the Tube accounts for seven per cent of all trips. Buses are used by people of all ages whereas rail services are more often used by 25-44 year olds. Londoners on the full range of household income levels use buses although those on low incomes tend to use buses more. Around two-thirds of all bus trips are made by Londoners whose annual household income is less than £25,000 compared to one-third of all rail trips.¹⁵

Londoners use buses for many different reasons. Just over one-third of all bus journeys are made for shopping or personal business (38 per cent) with 22 per cent made for leisure reasons, 19 per cent for work and 14 per cent for education. On weekdays, work is the main reason Londoners use buses accounting for around 2.1 million bus trips. As such, there is a peak in bus use between 7am-9am on weekdays. There is also a second peak in demand around 3pm reflecting a combination of shopping and personal business trips, leisure trips and the end of the school day.¹⁶

How does demand for bus services compare to supply?

Demand for bus travel in London has been growing at a faster rate than supply and the gap is set to widen. In the period 1999/00 to 2012/13, the number of bus kilometres operated grew by 136 million or 38 per cent to 490 million, with over 90 per cent of this growth occurring in the period 1999/00 to 2008/09. By contrast in the period 2012/13 to 2021/22, TfL is planning to increase the number of bus kilometres operated by just 20 million or four per cent to 510 million.¹⁷ Although a lower increase in supply of bus services may suppress demand, demand continues to grow at a faster rate than supply reflecting the fact that many factors including population growth affect demand for bus travel. Actual and projected

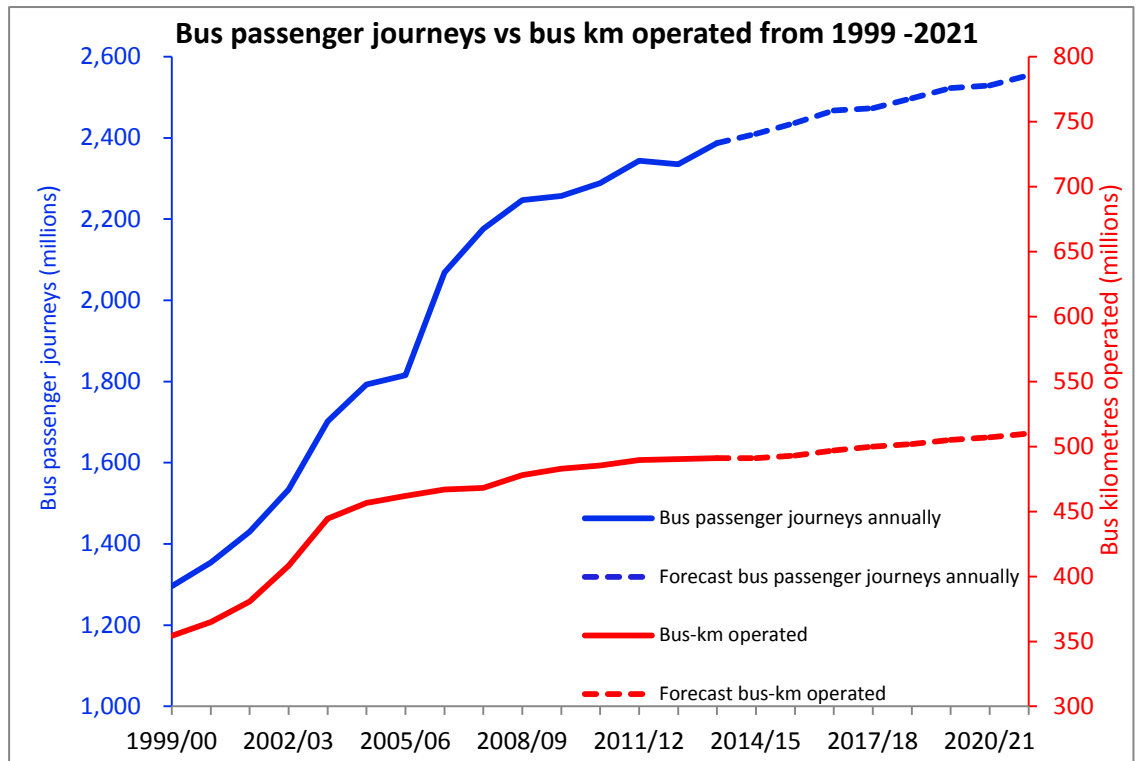
¹⁴ Transcript of Transport Committee meeting on 6 June 2013, p 6-9

¹⁵ TfL, Roads Task Force Thematic Analysis – Technical Note 7, 2013

¹⁶ TfL, Roads Task Force Thematic Analysis – Technical Note 7, 2013

¹⁷ Based on TfL Travel in London report 3, annual reports and its written submission, 19 June 2013

growth in bus passenger journeys compared to bus kilometres operated is shown in the graph below.¹⁸



What are the implications of rising demand for bus services?

TfL has acknowledged that rising demand for bus travel without major expansion of the bus network will lead to busier buses. Last year, 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 to meet rising demand 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.¹⁹

¹⁸ NB The method of calculating bus passenger journeys changed in April 2007. The 2006/07 has been updated to take account of the new method, but prior years (2005/06 and previous) figures are based on the old method.

¹⁹ Transcript of Transport Committee meeting on 5 December 2012, p14

“I have lived near the 208 route for 13 years and it is literally a major bus service linking Lewisham and Bromley... It is good that the 320 was added recently to alleviate congestion on this service”

- Bus user

The inability to board a bus because it is too full or to have to stand once on board could adversely affect bus customer satisfaction. At present bus passengers rate the service highly. Around two-thirds of respondents to the Committee’s survey suggested the bus service in their area was either good or excellent. In 2012/13, TfL’s overall bus customer satisfaction rating was 83 out of 100 – two points higher than its target and the rating achieved in 2011/12.²⁰ However, if in future more bus passengers are unable to board buses because they are too full or have to stand when they do board, they could be far less positive about the bus service.

Bus customer satisfaction directly affects how TfL operates the bus service. TfL reports that it measures the drivers of bus passenger satisfaction regularly and time-related factors are always dominant.²¹ For example, in 2011/12, the time taken to make a bus journey accounted for the greatest proportion of overall bus passenger satisfaction (20 per cent), followed by personal safety (12 per cent), comfort (10 per cent) and crowding (9.5 per cent).²²

How are the Mayor and TfL meeting the challenge of rising demand for bus travel?

“Route 251 has seen huge increases in usage over the years and is now often very overcrowded. I hardly ever get on where there aren’t people standing, and I have been left behind by full buses at around 8am quite a few times. The route seriously needs higher peak frequencies or double-deckers”

- Bus user

The Mayor has pledged to respond to changing demand for bus services. In his Transport Strategy (2010) he reports 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 to ensure the network caters for growth in population and employment while maintaining ease of use, attractive frequencies, adequate capacity, reliable services and good coverage. This includes reviewing the strategic priorities underlying the process approximately every five years.²³

Although the Mayor and TfL have acknowledged rising demand for bus travel, they have published few details of how they will address this, if there is no major expansion of the bus network. TfL told the Committee that accommodating the increased demand depended on the time of day and geographical location where it occurred. If demand was outside peak times and locations it could be accommodated but where it was not TfL might shift from using single-deck buses to double-deckers to provide

²⁰ TfL quarterly performance information report for TfL Board meeting on 3 July 2013, p12

²¹ TfL, Roads Task Force Thematic Analysis – Technical Note 7, 2013, p13

²² Ibid

²³ Mayor’s Transport Strategy (May 2010), p142

more capacity or re-allocate bus resources from quieter, off-peak periods to busier bus routes.²⁴

“While the standard of bus services is generally high, I’ve been disappointed by bus service cuts in recent years; the curtailment of the 73 and the 349 have made certain journeys more difficult”

- Bus user

In the absence of expanding the bus service, the options for meeting rising demand may not be straightforward. TfL might be able to switch from using single-deck to double-decker buses on some routes but this option may not be enough to meet all rising demand, particularly given that this has already been done on many bus routes to cope with current demand. TfL could reallocate resources from existing quiet routes to busier bus routes but this may mean a reduction in services for some bus passengers who rely on these quieter routes to make their journeys. TfL has not made clear which bus routes may be subject to reductions in service. Recently Sir Peter Hendy told the Assembly that although TfL was cautiously optimistic about dealing with rising demand in the short term by reallocating bus resources, in the end there could be a need to increase the bus service.²⁵

In contrast to the situation for the bus network, there are published plans for meeting changing demand on most other public transport modes. For the rail network, Network Rail’s London and South East Route Utilisation Strategy (RUS) (2011) sets out the forecasts for future demand for rail travel until 2030 and how it plans to meet this demand.²⁶ TfL’s Upgrade Plan for the Tube (2013) shows how TfL intends to meet projected rising demand for the Tube through line and station upgrades.²⁷ Recently the Mayor’s Roads Task Force report (July 2013) addressed the issue of rising demand for the road network. It called for investment of £30 billion in the next 20 years to improve London’s streets and roads but provided few details of the potential future role of the bus service.²⁸

London’s bus network is facing a challenge. Demand for bus travel continues to rise but there are no plans for a major increase in bus service capacity. The Committee’s survey shows that today passengers on some bus routes are already experiencing very busy services and even overcrowding. In future many more passengers may find themselves waiting for long periods at bus stops for a bus that it is not full or struggle to find seats when boarding buses. While overall bus customer satisfaction ratings are high now, these may decline if crowding worsens. TfL may find that bus journey times and reliability are no longer the main issues of concern for bus passengers. The Mayor

²⁴ TfL written submission, 19 June 2013, p8

²⁵ Transcript of London Assembly plenary meeting, 9 October 2013, p21

²⁶ Available on Network Rail’s website – www.networkrail.co.uk

²⁷ TfL, Our Upgrade Plan, Available on TfL website - www.tfl.gov.uk

²⁸ Available on the GLA website – www.london.gov.uk

and TfL should show awareness of this issue now by encouraging bus passengers who experience overcrowding to report this including in real-time via Twitter.

The Mayor and TfL acknowledge the need to address changing demand for bus travel but have yet to publish full details of how they will do so. TfL is planning to meet the challenge through reallocating existing bus resources but it is not clear which bus routes will see a reduction in service levels. Moreover, TfL suggests reallocating bus resources may only work in the short-term and, in future, as demand continues to rise the bus service may need to expand. Despite the bus being the most popular form of public transport in the capital and a vital component of the whole transport system providing much needed resilience when other modes suffer disruption, there is no published vision for the future development of the bus network. By contrast, there are published plans for the development of the Tube and rail networks setting out future forecast demand and how this will be met.

Many Londoners rely on buses to make their journeys. They should be reassured that the Mayor and TfL have a plan to meet the challenge of rising demand for bus travel.

Recommendation 1

By March 2014 the Mayor and TfL should demonstrate to Londoners how they are meeting the challenge of rising demand for bus travel by publishing a long-term strategy for the development of the bus network. This strategy should include a mechanism whereby TfL will monitor and respond to bus passengers' reports of overcrowding e.g. via Twitter and publish its findings and actions from this monitoring.

Measuring the performance of bus services

TfL collects and publishes a huge amount of information on bus service performance. Its key quality of service indicators relate to waiting times and reliability. For high frequency bus services,²⁹ TfL measures average excess waiting time and for low frequency services³⁰, the percentage of buses departing on time and it records bus kilometres operated for all services to track when buses do not run as planned. TfL publishes details

²⁹ There are five or more buses per hour and passengers will not have to look at timetables

³⁰ They run to an advertised timetable that usually involves four buses or fewer per hour

of performance against these indicators for the bus network as a whole, for each route and for all the routes in each borough.³¹ TfL also publishes bus operator league tables showing how operators are performing against these measures.³² Much of TfL's performance data is generated from the iBus system.³³

“The constant occurrence of buses ending their journey before getting to the original destination is ridiculous. I understand that this is often because the bus companies are fined if they end up with buses too close together”
- Bus user

The Committee has heard of some negative consequences from TfL and bus operators' focus on bus waiting time and reliability performance indicators. Some bus passengers have complained about their bus services being curtailed before they reach the original destinations. Bus operators may take such measures to regulate the service on a route and avoid bus vehicles bunching together. London TravelWatch notes bus service curtailment often happens because of poor traffic conditions and can result in more crowding. It reports communities at the end of bus routes complain about bus service curtailment, overcrowding and reliability problems which are all interrelated.³⁴

Measuring crowding on bus services in London

TfL does not routinely publish details of crowding levels on bus routes. It reports crowding to be a function of service capacity and passenger waiting times and plans for most passengers to be able to board the first bus to arrive where the scheduled interval between buses is every ten minutes or more. Where the interval is less than this, passengers should normally be able to board a bus within ten minutes of arriving at the stop.³⁵ However, TfL does not publish details of how many passengers are unable to board buses within these timescales or how many passengers are on board each bus especially in peak periods.

By contrast, there is published information on rail crowding levels. The Government and rail industry measure rail crowding using a standard measure of passengers in excess of capacity (PiXC) to generate information on the busiest individual rail services at peak times. This measure comprises the number of standard class passengers on a train that are in excess of the standard class capacity at the critical load point. To obtain the data for this measure, every autumn the number of passengers on each train service is counted either manually or automatically at peak times to generate an average number of standard

³¹ See TfL web site <http://www.tfl.gov.uk/tfl/businessandpartners/buses/boroughreports/>

³² See TfL web site <http://www.tfl.gov.uk/businessandpartners/busoperators/1232.aspx>

³³ iBus is the automatic vehicle location system which tracks all buses using a GPS System satellite. It allows controllers of bus services to communicate with bus drivers in real time via radios.

³⁴ London TravelWatch's written submission

³⁵ TfL's written submission, 24 July 2013 and TfL's Bus Service Planning Guidelines, August 2012

class passengers on the train which is then compared to standard class capacity. The rail crowding levels for each rail service are published by the Department for Transport.³⁶

Calculating crowding on bus services in London

Calculating crowding on the bus network may be complicated. The bus network is far larger than the rail network with many more services. While TfL can measure the supply of bus services reasonably well because it knows how many buses it operates, the length of each bus route, and the amount of passenger places on a bus vehicle, measuring demand is more complex because this will vary greatly by time of day and location. TfL reports average bus occupancy per year but this masks huge variations in the numbers of passengers per bus especially at peak times.

TfL uses periodic surveys of bus passengers to generate detailed data on demand for each bus route. TfL conducts Bus Origin and Destination (BOD) surveys where it questions bus passengers on a route to find out where they are travelling to and from in order to generate an understanding of average distance travelled by passengers on that route. TfL also conducts bus loading surveys where people stand at busy points on the bus network and manually count the number of passengers on particular routes at different times of day. TfL is seeking to supplement the data from these periodic bus passenger surveys with continuous Oyster card data to develop more frequent information on the numbers of passengers on each bus at all times and locations.

“TfL should be able to provide detailed information on current crowding levels, using Bus passenger Origin and Destination (BOD) surveys, as well as projections on future crowding levels.”

-London Councils

In the past, TfL has published some details from its periodic surveys of bus passengers. For example, TfL provided details of bus occupancy rates at different times of day at different locations on Oxford Street and surrounding roads to the Transport Committee.³⁷ As part of monitoring the impact of the Congestion Charge, TfL published details of the numbers of passengers per bus crossing the western extension boundary at various times during the day.³⁸ TfL also publishes information from its annual central area peak count that identifies the number of people entering central London by all modes including buses at peak times.³⁹

³⁶ Available to view online via: www.gov.uk

³⁷ Transport Committee’s investigation into congestion on Oxford Street, Regent Street and Bond Street (2010). The information is available online via: www.london.gov.uk

³⁸ <http://www.tfl.gov.uk/assets/downloads/sixth-annual-impacts-monitoring-report-2008-07.pdf>

³⁹ Available at: <http://www.tfl.gov.uk/assets/downloads/corporate/central-london-peak-count-supplementary-report.pdf>

The Mayor and TfL should report regularly on the usage of all bus routes to show that they are monitoring rising demand for bus travel. TfL collects and publishes vast amounts of information about bus service performance at the network, borough and individual route level. However, TfL does not routinely report how many people are waiting at bus stops because buses are too full to board or how many people are using each bus especially in peak periods. By contrast, there is published information on crowding levels on rail services with a standard measure of rail passengers in excess of capacity.

While the bus network is more complex than the rail network, it should be possible for TfL to devise a suitable bus crowding measure in the same way that it has devised a measure of excess waiting time for the bus network. TfL could develop a bus crowding measure from using Oyster card data, summarising its bus loading surveys or by exploring the scope for the IBus system to generate further useful data on bus usage. For example, bus drivers could be required to report when they have been unable to allow bus passengers to board at a bus stop because their vehicle is full.

Recommendation 2

By March 2014 the Mayor and TfL should demonstrate to Londoners that they are monitoring and addressing the busyness of buses by devising a performance measure for all bus routes that captures how many people cannot board a bus because it is too full and cannot get a seat once on board in peak times. They should set annual targets for performance against this measure and report on progress against these targets twice a year.

Part 2 – Meeting the challenge through bus service planning

Overview

In the absence of major expansion of the bus network, TfL's bus planning processes will be crucial to meeting the challenge of rising demand for bus travel.

How does TfL plan bus services?

TfL reports that its bus service planning process is continuous and carried out on a network-wide basis. TfL monitors performance of the entire bus network and may make adjustments at any time to address issues. Since May 2008, TfL has made 350 permanent bus service changes and over 400 planned temporary changes to improve the network.⁴⁰

TfL makes changes to its bus services in accordance with its published guidelines for planning bus services (August 2012).⁴¹ These guidelines set out five principles that TfL considers when devising any changes but they are not rules. TfL uses these in its consultation on bus service changes.

1. Provide a frequent bus service: where justified by demand, weekday services should be designed to run every 12 minutes or better in the daytime.
2. Provide a reliable bus service: minimum performance standards for waiting times are set for each bus route.
3. Provide a simple bus network: service routings should be as straightforward as possible.
4. Provide a comprehensive bus network: it is desirable for the bus network to run within about 400 metres of any residences in London and to ensure people have access to their local amenities such as shops, hospitals, schools and transport interchanges.
5. Provide a cost-effective bus network: TfL has a benefit to cost ratio of 2.0 to 1. For every extra £1 of net spending on changes to bus services, it should result in passenger benefits worth at least £2.⁴²

⁴⁰ TfL written submission 19 June 2013, p3

⁴¹ Available to download from TfL web site – www.tfl.gov.uk. TfL's written submission of 19 June 2013 gives more details about these guidelines and how it uses them to consult on changes

⁴² TfL analyses proposals for changes to bus services on the basis of costs versus benefits to passengers in terms of waiting and travel times.

TfL works closely with the bus service operators when planning bus services. Around 20 privately owned bus companies run the bus services in London. The bus companies bid to run individual bus routes for an initial period of five years with the option of a two year extension. This provides for a continuous programme of tendering, with between 15 per cent and 20 per cent of bus routes typically tendered each year. The contract for each bus route includes financial incentives for good performance and penalties for poor performance.⁴³

TfL consults on all significant changes to the bus network including the re-tendering of routes. The consultees include boroughs and London TravelWatch. TfL suggests its consultation has always exceeded the statutory minimum required and has been expanded to include other responses from any interested party as a result of publishing any proposed bus service changes on its web site. TfL has run over one hundred significant consultations on bus services in the last two years.⁴⁴

How effective is TfL's bus service planning process?

The Committee has heard some concerns about TfL's bus planning process. These concerns relate to TfL's approach to making changes to bus services, the transparency of its decision making on any changes to bus services, and its consultation on bus services.

London Councils has provided a detailed account of boroughs' concerns about TfL's bus service planning process which has been published alongside this report.

Route-by-route and area based bus service planning

There is a widespread perception that TfL only makes changes to bus services on a route-by-route basis. Boroughs have the impression that it is often only when a bus route contract is due for renewal at five or seven years that a bus service is reviewed. Moreover, even then the boroughs suggest that it is not always evident there is any wider assessment of the bus network. The questions in TfL's bus service consultations usually refer to on-going issues on the specific bus route with the assumption that the actual routing will be retained. For boroughs, this limits the scope for TfL to reflect on relevant local socio-economic developments that may affect demand for bus travel. For example, new housing or shopping developments or changes in local demographics which may mean people

⁴³ TfL, London's Bus Contracting and Tendering Process, 2009

⁴⁴ TfL's written submission, 19 June 2013, p9

cannot access the full range of services including council services and Jobcentre Plus offices by bus. In turn, boroughs suggest TfL's approach can lead to unintended consequences in terms of under or over provision of bus vehicles ('over bussing') on a bus route.⁴⁵

London boroughs have long advocated area based bus planning. London Councils suggests this approach would provide an opportunity to combine effective individual bus route planning with better consideration of local socio-economic developments. An area or corridor based approach would provide for consideration of all travel options in a geographical area to understand local travel demand in full. It could take into account TfL's bus planning guidelines, TfL and boroughs' transport policies and borough intelligence on land use planning and socio-economic developments that may result in different demand for bus services.⁴⁶

A different approach to planning bus services could provide for more orbital and express bus routes. In his 2008 election manifesto, the Mayor promised to trial express orbital bus routes in outer London.⁴⁷ However, very few orbital and express bus routes exist. London Councils suggests TfL's current bus planning process may look unfavourably at orbital routes because passenger numbers may be lower but the value of interchange and access to local centres may be high.⁴⁸ Thus if TfL took a different approach to bus planning based on geographical areas it may result in a different appreciation of the role of orbital and express routes.

The Committee has heard of some specific area based bus reviews. In relation to Crossrail, TfL has met with the five central London boroughs affected to discuss the implications of Crossrail for the bus network as a whole and is now undertaking further analysis in light of these discussions.⁴⁹ At the Queen Elizabeth Olympic Park, TfL worked in consultation with relevant boroughs, the London Legacy Development Corporation and others to prepare bus service changes for the area.⁵⁰ TfL has also reported on its close and regular contact with boroughs such as Bexley and Greenwich to understand how local planning developments and changes in land use will affect demand for bus services.⁵¹ London Councils has highlighted some area based bus studies by boroughs.⁵²

⁴⁵ London Councils' written submission, 30 August 2013

⁴⁶ London Councils' written submission, 30 August 2013

⁴⁷ Boris Johnson, Getting Londoners Moving, Election Manifesto, 2008

⁴⁸ London Councils' written submission, 30 August 2013

⁴⁹ TfL presentation on Crossrail planning to Central London Sub-Regional Panel, 19 March 2013

⁵⁰ TfL's written submission, 19 June 2013, p4

⁵¹ TfL's written submission, 24 July 2013

⁵² London Councils' written submission, 30 August 2013

The Committee has heard about the London Borough of Enfield's recent work to consider all bus services in its area. Councillor Levy explained how Enfield had sought to identify the impact of future local developments including new schools, regeneration projects and planned changes in health service provision on demand for its bus routes. This process involved the borough consulting local residents and stakeholder groups to identify issues on existing bus routes and analysing relevant demographic data including the census to develop a fuller understanding of current and future demand for bus services. The process has resulted in some proposed changes to the borough's bus routes to ensure they better match future needs.⁵³ TfL is now seeking to undertake further work with the borough on these proposed changes.

TfL reports that it plans bus services on a network-wide, continuous basis but this is not the perception of many organisations. London boroughs are concerned that, on the whole, bus routes are only reviewed on a route-by-route basis when bus services come up for re-tender every five or seven years. For boroughs, this can mean any changes made to bus routes fail to take into account other important issues such as local planning developments and demographic changes that may change local demand for public transport.

In light of growing demand for bus travel, TfL has said it needs to get smarter about its bus service planning process. More area based or cross-borough boundary bus service reviews may assist TfL to meet this objective by providing for more detailed understanding of local demand for bus travel. This may be evident in the recent work undertaken by the London Borough of Enfield on bus routes in its area. More cross-borough boundary bus service reviews would also show where more orbital and express bus routes could be provided. In the past, TfL has completed various area based bus reviews which have worked well.

Recommendation 3

By March 2014 the Mayor and TfL should devise and publish a programme of cross-borough boundary bus service reviews and set out, for consultation, proposals for more orbital and express bus routes.

⁵³ Transcript of Transport Committee meeting on 6 June 2013

TfL's 'black box' of decision making on bus services

The Committee has heard that it can be unclear how TfL reaches decisions on any changes to bus services. Stephen Locke, Chair of London TravelWatch commented on the frustrations that “we are not able to see inside the ‘black box’ at TfL to see why bus services are changed.”⁵⁴ The ‘black box’ of TfL’s decision making on bus services may mean TfL refuses to make some proposed changes but does not fully explain its rationale. London TravelWatch suggests TfL needs to find a way of describing its bus planning process, including the costs of changes to bus services, in order that more informed input can be made by stakeholders.⁵⁵ The Committee has seen this issue at first hand on two site visits to meet Londoners who have been lobbying for changes to their local bus routes.

Case study: Bus route 343

There is a long-standing campaign to address crowding on bus route 343 which runs from Tooley Street to New Cross Gate and is operated by Abellio London.

“The section of route 343 that runs from Peckham to Elephant and Castle is so congested during the rush hour (8am to 10am) that people have been left waiting from 15 to 40 minutes as full buses drive past without stopping”

- Harriet Harman MP

When the Committee visited in July, local campaigners highlighted that the 343 is an ‘orphan’ bus route – the only one serving the area around Southampton Way where many people live – and has insufficient service levels to meet demand. Buses on route 343 are often overcrowded, infrequent and slow. In the past TfL surveys have suggested that capacity on the 343 was sufficient but in 2012 the Mayor reported that the most recent survey, taken in mid-November, show that an adjustment to route 343’s schedule would be beneficial.⁵⁶ While TfL has added some more buses to route 343, this has not resulted in sufficient improvements to crowding levels. The photograph below shows many passengers having to wait at one bus stop for the 343.⁵⁷

Local councillors from the London Borough of Southwark highlighted the council’s role in the campaign. They stressed the deprivation in the local area and the need for better public transport links. The councillors called on TfL to undertake meaningful consultation on local bus services.

During the site visit, TfL reported its intentions to introduce an interim

⁵⁴ Transcript of Transport Committee meeting on 6 June 2013, p27

⁵⁵ London TravelWatch’s written submission

⁵⁶ Mayor’s response to Valerie Shawcross AM MQT 3749/2012, 21 November 2012

⁵⁷ Harriet Harman MP’s written submission

solution to crowding on route 343. This would provide for two further journeys in the morning peak period. At this time TfL would also present a medium term solution which could comprise a restructuring of route 343.⁵⁸



Case study: Bus route 22

There is a campaign to extend bus route 22 to the Roehampton area. Route 22 currently runs from Piccadilly Circus station to Putney Common and is operated by Go-Ahead London.

“Staff and students commuting to and from the University of Roehampton struggle with over-crowded buses. I would welcome a better link between the university and central London with its employment opportunities and transport hubs”

- *Member of staff, University of Roehampton*

Over 20 local residents and representatives of local organisations attended the Committee’s site visit in July to give evidence. They advised of problems with infrequent bus services in the Roehampton area. They want an extension of bus route 22 to address considerable demand for bus travel from the University of Roehampton which has 9000 students and 1000 staff, the local hospital, and new residential developments. The campaigners suggested that many residents used their cars to travel because of the poor bus service provision.

At the site visit, TfL advised that it had increased buses on route 72 in response to issues raised but that it would be too expensive to extend route 22. TfL estimates the cost at £2 million p.a. (net cost) and suggests extending route 22 could also affect service reliability. However, TfL acknowledged that local residents were continuing to report problems with bus services in the area and agreed to look again at possible solutions.⁵⁹

⁵⁸ Note of Transport Committee’s site visit on 9 July 2013

⁵⁹ Note of Transport Committee’s site visit on 1 July 2013

TfL's consultation on bus service changes

London boroughs have raised issues about how they are consulted by TfL on bus services. They report lower levels of communication on bus network planning issues since TfL abolished its stakeholder liaison manager posts. London Councils wants TfL to explore how to replicate previous liaison measures within existing borough engagement structures such as the multi-modal sub-regional structures. London Councils also wants TfL to continue the bus network development and consultation seminars for boroughs.

“There are problems with consultation. The biggest single change to the routes I use was the withdrawal of the 113 from Oxford Street but the public/users were not consulted about this. I would have liked to have suggested possible alternatives. As it was, the cut was made and my usage has plummeted as the route is now so much less convenient”

-Bus user

-

Others have called for more consultation on bus service changes with Londoners. Transport for All wants to see local communities consulted throughout the whole period of a bus contract to ensure the service continues to meet local needs. It also wants bus users consulted when services are re-tendered.⁶⁰ London TravelWatch has highlighted that, in comparison to users of other modes, bus passengers often lack a ‘loud voice.’⁶¹ Yet the Committee’s survey shows bus users are keen to contribute their views on bus services. Around 95 per cent of respondents reported that they would be likely to respond to a consultation about buses in their area. Of these around two-thirds (67 per cent) would like to be consulted via an online survey.

The Committee has heard of good practice in bus user consultation in Sheffield. In 2010 the Sheffield Bus Partnership asked the residents of Sheffield what they wanted from their bus services. Around 1,268 people responded to this consultation and their responses informed a second consultation in summer 2012 on detailed proposals for changing Sheffield’s bus network. Bus users were advised of the proposed changes through many different mechanisms including a dedicated web site, 230 community access points, consultation leaflets and posters on buses. The second consultation attracted 2,600 responses and as a result of the bus users’ responses one in five of the service proposals were altered. Passenger Focus has commended this bus user consultation for its approach and methodology.⁶²

TfL has acknowledged the scope to change its consultation on bus services. During the Committee’s site visit on bus route 343, Peter Bradley, Head of Consultation at TfL said alternative arrangements were now being developed. TfL was seeking to improve engagement with the

⁶⁰ Transcript of Transport Committee meeting on 6 June 2013

⁶¹ London TravelWatch’s written submission

⁶² Transcript of Transport Committee meeting on 2 July and Sheffield City Council’s submission

boroughs on bus service issues at a strategic level, possibly by providing a forum where topics could be discussed more fully.⁶³ In the past, the Committee has noted TfL's successful targeted consultation with passengers such as in relation to Tube upgrades or during the 2012 Games when TfL has sent specific emails to Oyster card holders advising them of changes to public transport services that they used.⁶⁴

London boroughs and their residents want to have a say on bus services. TfL should welcome this interest. The boroughs and users of bus services can assist TfL to understand changing local demand and shape bus services to match it. While TfL has finite resources and cannot say "yes" to all requests for bus service changes, it can be clear about its assessment of any proposals for changes, why it cannot make the changes proposed, and how else it might be able to respond to the issues raised. In effect, TfL can make its 'black box' of decision making on bus services transparent.

TfL should improve its consultation on bus services. It should consult regularly with the boroughs about bus services in their area and provide for bus users to contribute their views too. TfL should actively seek out bus users' views by sending targeted emails to those who use Oyster cards. All Londoners who use buses and those who may consider using them should be able to have a say on the future development of the bus network including on TfL's guidelines for planning bus services.

Recommendation 4

By March 2014 the Mayor and TfL should devise and publish details of a new approach to bus service consultation to provide for boroughs and Londoners to have a more informed say on bus services. This should include provision for targeted consultation with bus passengers who use Oyster cards via email and for the boroughs and bus users to comment on TfL's guidelines for planning bus services.

⁶³ Note of Transport committee's site visit on 9 July 2013

⁶⁴ Transport Committee's report on 2012 transport legacy, February 2013

Planning bus services at NHS facilities in London

“I have severe mobility problems and regularly have to visit Queen Elizabeth hospital which requires me to use two buses. I wish we had a direct link”

- Bus user

“We haven’t got any buses going from Barnehurst to any hospital direct. As you get older it is difficult to get two or three buses just to get to hospital”

- Bus user

Many bus users have raised particular concerns about insufficient bus services at hospitals. These include concerns about the bus services for Chase Farm Hospital in Enfield, Queen Elizabeth hospital in Woolwich, Hillingdon hospital and the Darent Valley Hospital in Dartford.⁶⁵

Londoners often rely on buses to make health-related trips which, in total, amount to one million or nearly five per cent of all daily journeys in the capital.⁶⁶

Bus service provision at NHS facilities is a long-standing concern. Some campaigns for changes to bus services at hospitals have been successful but often TfL reports there is insufficient demand to justify the cost of major changes to bus services at a hospital. In response to this, London TravelWatch has suggested TfL should change its approach to bus planning so it does not treat all bus journeys as equal and instead gives greater value to bus journeys to hospitals. London TravelWatch also suggests that NHS providers need to prioritise patient and visitor journeys in the way they manage their facilities.⁶⁷

The reconfiguration of NHS services has intensified concerns about bus services at hospitals. At the Committee’s meeting in June, the Chair of Sutton Seniors’ Forum questioned the potential for longer bus travel times than estimated to St George’s hospital in Tooting and Croydon University Hospital if the closure of services at St Helier hospital in Carshalton went ahead. Faryal Velmi, Director of Transport for All echoed this point. She said “the anxiety and absolute fear that people have in terms of this reconfiguration in the NHS... is a big concern... I think there does need to be a lot more joined-up thinking about how people are going to get to hospital appointments and we feel that is not happening.”⁶⁸

TfL works with NHS providers to plan bus services but has experienced difficulties. TfL has struggled to identify the relevant NHS staff who can provide adequate data on the numbers of people travelling to and from hospitals.⁶⁹ With such data TfL can model demand for bus services at hospitals and plan effective service provision.⁷⁰ TfL also supports patients and visitors travelling by bus by publishing spider maps showing all bus

⁶⁵ Transcript of Transport Committee meeting on 6 June 2013 and written submissions

⁶⁶ TfL, Transport Planning for Healthier Lifestyles, March 2013, p4

⁶⁷ London TravelWatch’s written submission

⁶⁸ Transcript of Transport Committee meeting on 6 June 2013, p25

⁶⁹ Transcript of Transport Committee meeting on 2 July 2013, p18

⁷⁰ More details are set out in TfL, Transport Planning for Healthier Lifestyles March 2013, p11-12

routes at each hospital. TfL is now looking to display these maps and real-time bus arrival information on screens within the reception areas of hospitals.⁷¹

The Committee has heard of examples of good practice in bus service planning at hospitals. Gerry Devine, Travel Plan Adviser to North West London Hospitals NHS Trust advised of the Trust's travel plan (funded by TfL) and a public transport liaison group which meets regularly to discuss transport issues at Central Middlesex hospital, Northwick Park hospital and St Mark's hospital. He also reported on TfL's involvement in work to consider the travel implications for the reconfiguration of health services in northwest London. The Committee has heard identifying sufficient funding for good public transport at NHS facilities is an issue. Gerry Devine stated "the crunch comes when you start asking for changes. We were told in last month's meeting the cost was around £400,000... in order to make what seem to be fairly minor changes to a bus route."⁷²

Adequate bus service provision at hospitals is a key issue. Many Londoners rely on buses to travel to and from hospitals and may worry that the reconfiguration of NHS facilities will result in longer or more complicated journeys. While there may not always be a strong cost/benefit case for major changes to bus services at hospitals, TfL and NHS providers should be working closely together to plan for good public transport links at major hospitals and health centres. Delivering good public transport accessibility at NHS facilities in London should be prioritised. The Mayor as Chair of the London Health Board – the partnership body that brings together local government, the NHS and the GLA to provide leadership on health issues of pan-London significance - has a role to play in ensuring this happens.

Recommendation 5

By March 2014 the Mayor and TfL should report on their work with NHS providers including through the London Health Board to plan for good public transport access at each London hospital and major health centre now and after NHS reconfigurations.

⁷¹ Letter from Leon Daniels, TfL to Transport Committee, August 2013

⁷² Transcript of Transport Committee meeting on 2 July 2013, p18

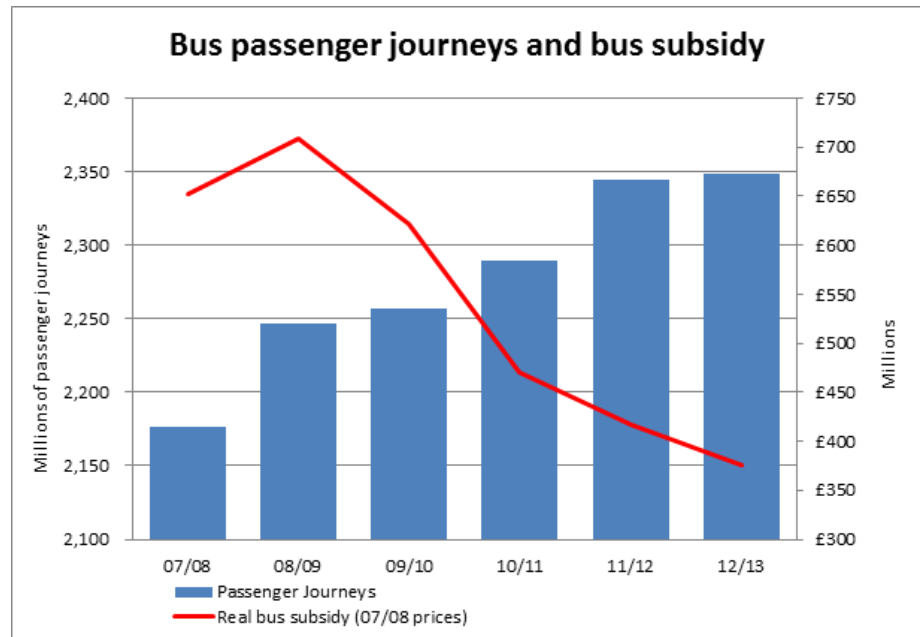
Part 3 – Maintaining an effective bus network

Overview

The Mayor and TfL will need to take other actions to ensure they meet the challenge of rising demand for bus travel and maintain an effective bus network.

Ensuring sufficient funding for bus services

TfL's funding for bus services is under pressure. The Government's spending review in June 2013 resulted in a reduction in revenue grant for TfL of around 25 per cent (£207 million) in 2015/16. TfL is assuming further cuts to its grant in future years amounting to £1 billion less funding for the period up to 2021/22.⁷³ Leon Daniels, Managing Director of Surface Transport, TfL told the Committee the spending review may have implications for TfL's plan to expand the bus network by four per cent by 2021/22. He highlighted that, in recent years, TfL had focused on decreasing the amount of government grant – or bus subsidy – that funds the bus service.⁷⁴ TfL's approach is depicted below.⁷⁵



⁷³ David Goldstone of TfL, Budget and Performance Committee meeting, 12 September 2013

⁷⁴ Transcript of Transport Committee meeting on 3 July 2013, p2-3

⁷⁵ TfL, Unlocking Growth document, May 2013, p25

The Committee has heard concerns about the future funding levels for bus services. These include fears about the possibility of further cuts to the bus subsidy and the need to generate more funding through higher fares. Unite suggested any decrease in funding for bus services could lead to lower wages for bus drivers resulting in higher staff turnover and poorer services.⁷⁶

How much does TfL spend on the bus service and how is this funded?

In 2012/13, TfL spent £1.9 billion operating the bus service (42 per cent of gross expenditure on all modes of transport). Around three-quarters of this expenditure - £1.4 billion or 74 per cent - was funded by fares with £0.5 billion (24 per cent) funded from grant income and the rest through commercial income.⁷⁷ In contrast, TfL spent £2.3 billion operating the London Underground in 2012/13 of which (92 per cent) was funded by fares. The difference in how the modes are funded is shown below.

Operating costs for Bus service and London Underground in 2012/13		
2012/13 (£m)	Bus service	London Underground
Gross operating expenditure	1,917	2,320
Fares income	-1,418	-2,124
Other income	-36	-175
Net operating expenditure	463	21

The debate about the bus subsidy

The debate about funding levels for the bus service often focuses on the size of the bus subsidy. TfL’s business plans show that for bus services the fares income collected is insufficient to cover the operating costs and hence the bus service receives a subsidy that is far higher than for some other modes.

However, focusing on the bus subsidy creates a misleading impression of the cost effectiveness of the bus service. If the total cost of operating the various modes of public transport and the impact of concessionary fares are taken into account, it is possible to gain a fairer sense of the costs of operating different modes.

⁷⁶ Transcript of Transport Committee meeting on 6 June 2013, p2

⁷⁷ Gross expenditure figures provided by TfL and based on TfL’s audited accounts

The cost effectiveness of the bus service

On the basis of total gross expenditure the bus service is as cost effective as the Tube. In 2012/13, the bus service and London Underground both had gross expenditure per passenger kilometre of 23 pence. Using this measure the bus service was also more cost effective than London Overground and the DLR. This is shown in the table below.

Gross expenditure of each mode in 2012/13			
2012/13⁷⁸	Passenger kilometres (millions)	Gross expenditure (£m)	Gross expenditure per passenger kilometre (£)
London Buses	8,258	1,917	0.23
London Underground	10,099	2,320	0.23
Docklands Light Railway (DLR)	506	139	0.27
London Trams	158	35	0.22
London Overground	780	207	0.27
All above modes	19,801	4,618	0.23

Gross expenditure may be a fairer way of assessing each mode's costs because it takes account of all costs. Within the TfL business plan, there is no reporting of gross expenditure as per the table above including gross expenditure per passenger kilometre.

The impact of concessionary fare schemes

The concessionary fare schemes disproportionately affect bus service income compared to London Underground income. Most concessionary fares are being used to make trips on the bus. Around 40 per cent of bus passengers travel for free or at a substantial concession compared to 11 per cent of London Underground passengers. Concessionary fares can be treated as lost revenue or as an additional service cost but either way the disproportionate use of them on buses has resulted in TfL depicting a subsidy for the bus service and not for other modes. The breakdown of the proportion of concessionary fares used on each mode is shown in the table below.⁷⁹

⁷⁸ Figures provided by TfL for the investigation and based on TfL's audited accounts

⁷⁹ TfL additional information provided on 19 September 2013

Percentage of daily passengers using concession fares on Tube and bus services in 2012/13

Concession fare type	London Underground	Bus service	Overall
Child under 16 (paid)	2.6%	0.0%	0.9%
Free Child	0.2%	13.9%	9.1%
Student	2.7%	2.8%	2.8%
Jobcentre Plus	0.1%	0.2%	0.2%
16/17	1.0%	4.8%	3.5%
Bus & Tram discount	0.0%	3.2%	2.1%
Freedom Pass	4.3%	13.9%	10.6%
60+ Pass	0.3%	0.7%	0.6%
Total	11.2%	39.5%	29.6%

The amount of government grant that funds the bus service - the bus subsidy - dominates the debate about funding for the bus service but it creates a misleading impression of the cost of this mode. On a total expenditure basis, the bus service is as cost effective as the Tube and more cost effective than the London Overground and the DLR. Any comparison between the cost of running buses and other modes needs to take into account all costs. Income from the bus service is also disproportionately affected by the impact of concessionary fare schemes. Londoners using concessionary fares are more likely to use these fares to travel by bus than to travel by Tube. It could be fairer to treat the cost of concessionary fares as a TfL-wide cost instead of a cost to each mode of transport.

Recommendation 6

In its next published business plan, TfL should demonstrate to Londoners the cost effectiveness of the bus service by showing the gross cost effectiveness and financial impact of concessionary fares for all modes of transport.

Introducing different fares and ticketing products for bus users

TfL could in theory fund expansion in the bus network by increasing fares but this could make bus travel less affordable for some passengers. Since 2008, a single bus fare increased by 55 per cent from 90 pence to £1.40. A report by the Intergenerational Foundation found that young people aged 16-24 years old rely more than other groups on buses, and that fare

risers can have a negative impact on their access to education and employment.⁸⁰

Nevertheless the Committee has heard that the Mayor and TfL could introduce different bus fares and ticketing products to help meet the challenge of rising demand. Professor Peter White suggested the Oyster card system has the potential to provide for greater variation in the price of tickets by time of day, which could assist in spreading demand.⁸¹ Cheaper fares outside of peak hours may encourage some passengers to change the times they travel. In the past the Transport Committee has called for the introduction of 'early bird' fares and part-time travel cards to incentivise more travel in off-peak periods.⁸² The Committee has also highlighted the scope for more publicity of the capping function on Oyster cards which kicks in after the third journey. Recently the Government's rail fares and ticketing review set out the intention to trial more flexible rail tickets that reflect the needs of modern commuters who may travel fewer than five days a week or could travel outside the peak hours.⁸³ The Government will begin trialling part-time rail season tickets on a busy London rail commuter line next year.⁸⁴

"I travel about 3.5 miles from home to work. However, despite the short distance, it is impossible for me to make the trip using just one bus and as TfL doesn't issue multi-transfer tickets or fixed duration tickets I have to pay each time I board a bus. This means that it costs me more to catch the bus than the Tube"

- Bus user

Many have called for a 'one hour' bus ticket. London Councils argues a 'through' ticket that provides for free transfer between buses within a particular timescale such as one hour would assist those on low incomes who may be disadvantaged by journeys that cannot be made by direct bus. At present someone can travel from an outer borough town centre to central London for £1.40 single fare on a journey that might take at least an hour but if they were to take a short journey within a borough involving two buses it could cost twice that at £2.80.⁸⁵ In the past the Mayor has indicated that TfL will look at the options for additional ticket products but stressed the need to find funding for such changes.

The introduction of new fares and ticketing products may help the Mayor and TfL to meet the challenge of rising demand for bus travel. Many bus users are on low incomes and cannot afford higher transport fares but they may change their travel habits and shift from using buses in peak times to quieter periods if incentivised to do so through new fare and ticket options. In light of the Government's recent rail fares and ticketing review focusing on part-time rail season tickets and

⁸⁰ *No Entry! Transport barriers facing young people*, Intergenerational Foundation, 28 May 2013

⁸¹ Professor Peter White's written submission

⁸² Transport Committee, 2012 Transport Legacy report, February 2013

⁸³ Published by Department for Transport (DfT) on 9 October 2013 online at: www.gov.uk

⁸⁴ Department for Transport press release, 17 September 2013

⁸⁵ London Councils written submission, p10

cheaper travel for part-time workers outside peak periods, the Mayor and TfL should be actively exploring the options for managing demand for bus travel more effectively through new fares and ticketing products. There may be scope to fund changes to fares and ticketing products through changes to how the bus network is operated as a result of increased passenger journeys that may result.

Recommendation 7

By March 2014 the Mayor and TfL should report on how they will use the next generation of Oyster cards to develop a passenger focused ticketing system that provides for new ticketing and fares options including 'early bird' fares, part-time travel cards and 'one hour' bus tickets, and funding options for these new products.

Tackling road congestion to improve bus services

Road congestion is a major challenge for the bus service. Stagecoach London told the Committee that congestion was the key threat to improving its bus service performance. Last year, Stagecoach London "lost" 700,000 miles to road congestion compared to a "loss" of 126,000 miles to factors within its control e.g. bus vehicle breakdown or not enough bus drivers. Stagecoach London estimates that it probably adds 10 new bus vehicles to its routes per annum just to address congestion and maintain its existing service level.⁸⁶

Many organisations have called for more bus priority measures to help address road congestion. London TravelWatch suggests the measures could include more bus lanes but also removing obstructions for buses, exempting buses from banned turns, and more bus detection at traffic signals to help prioritise bus journeys. London TravelWatch suggests bus service planning should be linked with bus priority planning to ensure TfL works collaboratively with boroughs to develop bus services. Stagecoach London has also called for more bus priority measures. It suggested some boroughs do not always recognise that buses can be part of the solution rather than the cause of road congestion. Stagecoach London would like to see a change in some boroughs' views about the value of bus services.⁸⁷ Alongside addressing road congestion, the Committee has heard of the importance of TfL and bus operators reducing the number of

⁸⁶ Note of Transport Committee site visit, 28 August 2013

⁸⁷ Note of Transport Committee site visit, 28 August 2013

road incidents and collisions involving bus vehicles.⁸⁸ TfL could have more transparency in its data on road incidents so it can work with boroughs to improve the safety of pedestrians and cyclists.

The Mayor's Roads Task Force report (July 2013) acknowledges the efficient use of road space by the bus service. Buses account for around 28 per cent of the person-trips by vehicles but make up only around two per cent of motorised traffic.⁸⁹ In response to the Mayor's Roads Task Force report, TfL has acknowledged the importance of addressing road congestion for bus services. TfL has said it will provide more priority for buses on key routes. TfL is focusing on tackling 30 traffic 'pinch points' on the road network which it has identified affect around 250 bus routes that carry three million people.⁹⁰

Road congestion is a major challenge for London's bus service. Rising traffic levels lead to slower bus journeys which can reduce bus service reliability and increase crowding on buses. Bus operators may be investing more money in their services each year just to tackle this congestion and maintain existing service levels. In effect they are investing to stand still rather than to expand to meet rising demand. The Mayor's Roads Task Force has recently looked in detail at the challenge of road congestion and has proposed a major investment of £30 billion over the next twenty years to tackle the issue. The Committee welcomes more investment to improve the road network and this may provide for more priority measures for buses. The boroughs also have a role to play in providing for more reliable bus journeys on their roads.

Recommendation 8

By March 2014, the Mayor and TfL should publish details on how they are improving bus journey reliability. This may mean more bus priority measures and tackling the 30 traffic pinch points on the road network that affect 250 bus routes.

⁸⁸ Transcript of Committee's meeting on 3 July 2013

⁸⁹ Mayor's Roads Task Force report, July 2013, p41

⁹⁰ TfL response to Roads Task Force report, July 2013, p33 – available at www.tfl.gov.uk

Addressing poor air quality through new bus vehicles

The bus service has a role to play in addressing London's poor air quality. Road traffic, including buses, is a significant source of air pollutants such as oxides of nitrogen (NOx). TfL has reported that it is now undertaking a "range of measures to make London a world leader in clean bus technology."⁹¹ The measures include retrofitting selective catalytic reduction (SCR) technology to existing bus vehicles and introducing more hybrid buses including the New Bus for London.⁹²

In 2013 the bus fleet comprises many different vehicles. These include: 8 New Bus for London hybrid vehicles; 20 diesel routemasters, 2, 608 single decker diesels; 5 fuel cell/hybrid single deckers; 28 single decker hybrids; 5,696 double decker diesels; and 352 double decker hybrids.⁹³ TfL reports NOx emissions will reduce by approximately 20 per cent over the next 2 years with the retrofit of SCR technology to 900 Euro III vehicles in the bus fleet and the programme of accelerated roll-out of Euro 6 buses which have significantly lower emissions. TfL is also on track to introduce 1,700 hybrid buses into the London bus fleet by 2016; this includes 600 New Buses for London.⁹⁴

The Mayor's decision to develop a New Bus for London has caused controversy. The Mayor originally intended bus operators to pay for the new bus but TfL has since taken responsibility for funding. TfL has ordered 600 new buses⁹⁵ at a cost of £212 million plus additional costs for the prototype models. The new bus requires an additional member of staff to supervise boarding at the rear at an estimated cost of £62,000 per vehicle.⁹⁶ The new buses began operating on Route 38 in February 2012 with route 24 the first to use the New Bus for London on all its services.⁹⁷ The Mayor has reported various benefits from the creation of the New Bus for London including improved bus passenger experience, the creation of new manufacturing jobs in the UK, and a bus vehicle that is less polluting than traditional diesel vehicles.⁹⁸

⁹¹ TfL, Business Plan, December 2012, p40

⁹² TfL, Roads Task Force Thematic Analysis – Technical Note 7, 2013, p12

⁹³ London data store, Data set showing numbers of bus by type of bus, October 2013

⁹⁴ Mayor's response to Jenny Jones AM MQT 3333/2013, 11 September 2013

⁹⁵ TfL press release, 3 May 2013

⁹⁶ <http://londonist.com/2013/05/new-bus-for-london-cost-revealed.php>

⁹⁷ TfL press release, 3 May 2013

⁹⁸ TfL press releases on 20 September 2012 and 29 May 2013

The Committee has heard some concerns about the New Bus for London. London TravelWatch queried the costs and suggested the cost of having both a driver and conductor might not make the New Bus for London a viable option for all bus routes in the capital. Transport for All expressed frustration at the smaller wheelchair space on the New Bus for London compared to other bus vehicles. Unite suggested the money invested in the New Bus for London would be better spent updating the existing bus fleet and making them more environmentally friendly.⁹⁹ The cost of the New Bus for London is higher than originally estimated¹⁰⁰ and the environmental impact of these bus vehicles is yet to be fully assessed. TfL is monitoring the fuel consumption of the New Bus for London throughout the year on route 24 to provide for more accurate like for like comparison with other bus vehicles, in real life conditions.¹⁰¹

TfL is now exploring the use of electric bus vehicles. It has taken delivery of two single decker electric buses from China which will start operating on two bus routes this year. It has also received government funding to roll out four more electric bus vehicles in 2014. There are, as yet, no viable electric double deckers but TfL will shortly begin trials providing for greater use of electric batteries on double deckers and decreased use of diesel.¹⁰² Some European cities have started using fully-electric bus vehicles including Vienna. Vienna is the first city to have rolled out fully-electric bus vehicles on one bus route, deploying 12 of these vehicles on a city centre bus route since autumn 2012.¹⁰³ A few electric bus vehicles are also in use in the UK including in Coventry, Nottingham, Dorchester and Durham.¹⁰⁴

Reducing air pollutants from bus vehicles is crucial to improving London's air quality. The Mayor reports that the New Bus for London is more environmentally friendly than many existing bus vehicles but the development of this new bus vehicle has caused concerns in relation to its high costs and limited accessibility, and its environmental impact has yet to be fully assessed. The New Bus does not therefore represent the full answer to London's future bus fleet needs. Instead TfL will need to continue upgrading existing bus vehicles and also pursue the development of other environmentally friendly bus vehicles including viable electric bus vehicles. Electric bus vehicles are used elsewhere in

⁹⁹ TfL press release, 23 December 2009

¹⁰⁰ The Mayor told the Assembly in 2009 that a new bus would cost less than £250,000

¹⁰¹ Mayor's answer to Darren Johnson AM's MQT, 1381/2013, 22 May 2013

¹⁰² TfL information, 22 October 2013 and Leon Daniels's update to TfL Board, 25 September 2013

¹⁰³ Siemens' written submission

¹⁰⁴ Optare's written submission

Europe and this country and provide the welcome potential for emissions-free bus travel.

Recommendation 9

By March 2014, the Mayor and TfL should publish the schedule for the roll-out of more environmentally friendly bus vehicles including electric bus vehicles to help reduce air pollution.

Conclusion

London's bus network is a success story. Bus services are by far the most used form of public transport with high levels of reliability and frequency. The bus network forms the backbone of the capital's transport system, often providing much needed resilience when rail and Tube services are disrupted.

Yet buses can seem like the poor relation in comparison to other modes. While demand for bus travel continues to rise, there are no plans for major expansion of the bus network. By contrast, there are plans to expand the Tube and rail networks to address rising demand. In recent years, the Mayor has also pledged more investment in, and published strategies for, increasing cycling and the use of river services.

To show they are meeting the challenge of rising demand for bus travel, the Mayor and TfL should publish a long-term strategy for bus service provision in London and report regularly on the usage of all bus routes. At the heart of their strategy should be new approaches to bus service planning which provide for more flexibility, responsiveness, transparency and involvement of relevant stakeholders especially the London boroughs and bus passengers. By working closely with others on bus service provision, TfL can help ensure its limited resources are effectively deployed to match Londoners' needs.

The Mayor and TfL may also need to take other actions to ensure they maintain the successful bus network. Bus services will continue to require sufficient funding. Often the debate about funding levels for the bus service has focused on the level of government grant (bus subsidy) needed to cover operating costs but this can be misleading. On a total expenditure basis the bus service is as cost effective as the Tube. It is also the mode of choice for many concessionary fare holders which can distort its income levels. Beyond maintaining sufficient funding levels, the Mayor and TfL should look to develop new fares and ticketing products to help spread demand for bus travel, tackle road congestion by providing more bus priority measures, and continue to reduce air pollutants from bus vehicles.

The bus network is an integral, vital part of the capital's infrastructure. It is time for the Mayor and TfL to recognise its importance by delivering a detailed vision for the future development of bus services in London.

Appendix 1 Recommendations

Recommendation 1

By March 2014 the Mayor and TfL should demonstrate to Londoners how they are meeting the challenge of rising demand for bus travel by publishing a long-term strategy for the development of the bus network. This strategy should include a mechanism whereby TfL will monitor and respond to bus passengers' reports of overcrowding e.g. via Twitter and publish its findings and actions from this monitoring.

Recommendation 2

By March 2014 the Mayor and TfL should demonstrate to Londoners that they are monitoring and addressing the busyness of buses by devising a performance measure for all bus routes that captures how many people cannot board a bus because it is too full and cannot get a seat once on board in peak times. They should set annual targets for performance against this measure and report on progress against these targets twice a year.

Recommendation 3

By March 2014 the Mayor and TfL should devise and publish a programme of cross-borough boundary bus service reviews and set out, for consultation, proposals for more orbital and express bus routes.

Recommendation 4

By March 2014 the Mayor and TfL should devise and publish details of a new approach to bus service consultation to provide for boroughs and Londoners to have a more informed say on bus services. This should include provision for targeted consultation with bus passengers who use Oyster cards via email and for the boroughs and bus users to comment on TfL's guidelines for planning bus services.

Recommendation 5

By March 2014 the Mayor and TfL should report on their work with NHS providers including through the London Health Board to plan for good public transport access at each London hospital and major health centre now and after NHS reconfigurations.

Recommendation 6

In its next published business plan, TfL should demonstrate to Londoners the cost effectiveness of the bus service by showing the gross cost effectiveness and financial impact of concessionary fares for all modes of transport.

Recommendation 7

By March 2014 the Mayor and TfL should report on how they will use the next generation of Oyster cards to develop a passenger focused ticketing system that provides for new ticketing and fares options including 'early bird' fares, part-time travel cards and 'one hour' bus tickets, and funding options for these new products.

Recommendation 8

By March 2014, the Mayor and TfL should publish details on how they are improving bus journey reliability. This may mean more bus priority measures and tackling the 30 traffic pinch points on the road network that affect 250 bus routes.

Recommendation 9

By March 2014, the Mayor and TfL should publish the schedule for the roll-out of more environmentally friendly bus vehicles including electric bus vehicles to help reduce air pollution.

Appendix 2 Stages in the investigation

The Committee held two public meetings for this investigation.

- On 6 June 2013 the Committee heard from representatives of relevant organisations and members of the public about bus services in London. The guests were: Cllr Derek Levy of the London Borough of Enfield; Stephen Locke, Chair, and Vincent Stops, Policy Officer, London TravelWatch; Faryal Velmi, Director, Transport for All; Wayne King, Regional Bus Officer, Unite; and Professor Peter White of the University of Westminster.
- On 2 July 2013 the Committee heard from: Leon Daniels, Managing Director, Surface Transport, TfL; Clare Kavanagh, Director of Performance, London Buses, TfL; Mark Threapleton, Managing Director, Stagecoach London; Nick Lester, Corporate Director for Transport and Mobility Services, London Councils; Gordon Deuchars, Policy & Campaigns Manager, Age UK London; Greg Challis, Senior Transport Planner, Sheffield City Council; and Gerry Devine, Travel Plan Adviser to North West London Hospitals NHS Trust

The Committee held three site visits for this investigation.

- On 1 July 2013, Members met local residents and councillors at the University of Roehampton to discuss issues relating to bus route 22.
- On 9 July 2013, Members travelled on bus 343 from Tooley Street to Southampton Way, SE5 where they met local residents and councillors to discuss the issues relating to bus route 343.
- On 28 August 2013, Members visited Stagecoach London's West Ham bus garage to view its service control centre operation of bus services.

The Committee conducted a survey of bus passengers that attracted over 1,000 responses. The survey was self-selecting so it is not representative of all bus users but it did provide a way of gathering lots of views.

The Committee held an informal meeting with Abellio London on 19 September 2013 and has received many written submissions from various organisations including TfL to inform its investigation.

Details of the Committee's meetings, site visits, survey results, informal meeting and the written submissions received have been published online alongside this report.

Appendix 3 Details of the ten most used bus routes

Table showing ten most used bus routes in London in 2012/13¹⁰⁵

Rank	Route	Average daily passenger journeys in 2012/13	Equivalent full double-decker buses per day	Average daily passenger journeys in 2002/03	Busiest point on route AM Peak	Busiest point on route PM Peak
1	25	64,152	737	39,184	Romford Road, Atherton Leisure Centre (West Ham) (Westbound)	Holborn Circus (Westbound)
2	18	46,997	540	34,327	Harrow Road Canal Bridge (North Paddington) (Eastbound)	Harrow Road Royal Oak Station (Westbound)
3	29	46,228	531	36,560	Camden Road Station (Southbound)	Camden Town Station (Northbound)
4	149	40,036	460	39,039	Kingsland Road Dunston Street (Southbound)	Kingsland Road Falkirk Street (Northbound)
5	38	36,997	425	28,658	Essex Road Station (Southbound)	Finsbury Town Hall (Northbound)
6	207	36,889	424	48,914	Uxbridge Road Bloemfontein Street (Eastbound)	Shepherd's Bush Market (Westbound)
7	5	34,483	396	14,562	Barking Bus Garage (Westbound)	Barking Station (Eastbound)
8	73	34,339	395	39,106	Essex Road King's Head (Southbound)	Islington Green Essex Road (Northbound)
9	86	33,207	382	24,732	Romford Road, Atherton Leisure Centre (West Ham) (Westbound)	Romford Road Water Lane (Maryland) (Eastbound)
10	243	33,058	380	25,560	Shoreditch Old Street (Southbound) Waterloo Bridge South Side (Northbound)	Clerkenwell Road Goswell Road (Northbound)

¹⁰⁵ TfL has given some caveats to figures for bus journeys on routes which are set out in full in its written submission of 19 June 2013, p11-12

Table showing ten routes most frequently cited as busy or overcrowded in the Committee’s survey of bus passengers

Route	Start point	End point	Bus operator
185	Lewisham	Victoria station	Go-Ahead London
208	Orpington	Lewisham	Stagecoach London
96	Bluewater/ Dartford	Woolwich	Stagecoach London
38	Clapton	Victoria	Arriva London
176	Penge	Tottenham Court Road station	Arriva London
172	Brockley Rise	St Paul’s	Abellio London
484	Camberwell Green	Lewisham	Abellio London
336	Locksbottom	Catford	Metrobus
162	Eltham station	Beckenham Junction station	Metrobus
358	Orpington	Crystal Palace	Metrobus

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Vietnamese

Nếu ông (bà) muốn nội dung văn bản này được dịch sang tiếng Việt, xin vui lòng liên hệ với chúng tôi bằng điện thoại, thư hoặc thư điện tử theo địa chỉ ở trên.

Greek

Εάν επιθυμείτε περίληψη αυτού του κειμένου στην γλώσσα σας, παρακαλώ καλέστε τον αριθμό ή επικοινωνήστε μαζί μας στην ανωτέρω ταχυδρομική ή την ηλεκτρονική διεύθυνση.

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Punjabi

ਜੇ ਤੁਸੀਂ ਇਸ ਦਸਤਾਵੇਜ਼ ਦਾ ਸੰਖੇਪ ਅਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਲੈਣਾ ਚਾਹੋ, ਤਾਂ ਕਿਰਪਾ ਕਰਕੇ ਇਸ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਉਪਰ ਦਿੱਤੇ ਡਾਕ ਜਾਂ ਈਮੇਲ ਪਤੇ 'ਤੇ ਸਾਨੂੰ ਸੰਪਰਕ ਕਰੋ।

Hindi

यदि आपको इस दस्तावेज़ का सारांश अपनी भाषा में चाहिए तो उपर दिये हुए नंबर पर फोन करें या उपर दिये गये डाक पते या ई मेल पते पर हम से संपर्क करें।

Bengali

আপনি যদি এই দপিলের একটা সারাংশ নিজের ভাষায় পেতে চান, তাহলে দয়া করে ফো করবেন অথবা উল্লেখিত ডাক ঠিকানায় বা ই-মেইল ঠিকানায় আমাদের সাথে যোগাযোগ করবেন।

Urdu

اگر آپ کو اس دستاویز کا خلاصہ اپنی زبان میں درکار ہو تو، براہ کرم نمبر پر فون کریں یا مذکورہ بالا ڈاک کے پتے یا ای میل پتے پر ہم سے رابطہ کریں۔

Arabic

الوصول على ملخص لهذا المستند بلغة،
فارجاء الاتصال برقم الهاتف أو الاتصال على
العنوان البريدي أو عنوان البريد
الإلكتروني أعلاه.

Gujarati

જો તમારે આ દસ્તાવેજનો સાર તમારી ભાષામાં જોઈતો હોય તો ઉપર આપેલ નંબર પર ફોન કરો અથવા ઉપર આપેલ ટપાલ અથવા ઈ-મેઇલ સરનામા પર અમારો સંપર્ક કરો.

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