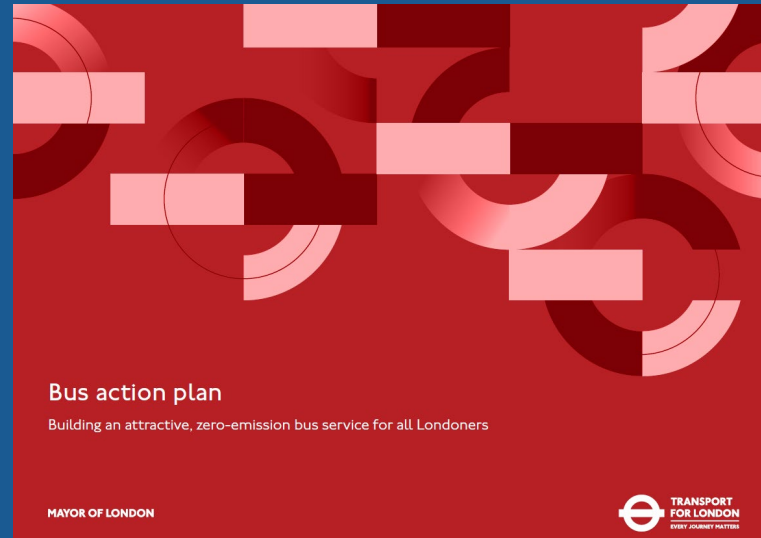


Appendix 1

Transport for London's Bus Action Plan – Customer Service and Operational Performance Panel Update



Tom Cunnington – Head of Bus Business Development, Bus Operations

5 March 2024



Our Bus Action Plan sets out:

- the case for change;
- our vision for 2030;
- our actions across five thematic areas; and
- our approach to uncertainty around demand and funding.

Case for change

- Tackling the climate emergency
- Meeting Londoners' diverse travel needs
- Avoiding growth in car usage and supporting Road User Charging (ULEZ)
- Complementing walking and cycling in creating Healthy Streets
- Enabling London's sustainable growth and development

Our vision

- We need bus travel to be a zero-carbon option more Londoners choose to use, as part of a comprehensive active, efficient and sustainable transport network

Our actions

Inclusive Customer Experience

Providing the information our customers need

Improving the customer journey experience

Enhancing the inclusivity of our services

Safety & Security

Delivering Vision Zero on our network

Ensuring people feel safe and secure

Improving bus driver welfare

Journey Times

Delivering better streets for buses

Making better use of street space

Optimising our operations

Connections

Planning our bus network to achieve mode shift

Trialling new types of services

Unlocking new homes and jobs

Decarbonisation & Climate Change Resilience

Delivering a zero-emission bus network

Investing in opportunity charging and hydrogen fuel cell buses

Delivering climate change adaptation and green infrastructure



External Engagement

Borough Meetings:

- Director / cabinet lead / elected member level;
- Feedback has been very good so far from 21 boroughs met;
- New Director of Bus to continue meetings and meet remaining 12 boroughs post election.

Borough Bus Event – Bus Action Plan 1 year on:

- May 2023 – Science Gallery, London Bridge;
- AM – series of presentations on first year of Bus Action Plan;
- PM – workshop with borough transport officers.



What we have achieved so far:

- 322 new countdown signs;
- c.10km of new bus lanes (Mar 2024);
- over 9,000 signal timing reviews at our junctions;
- 600 new Routemaster refurbishments (Mar 2024);
- 1,400 Zero Emission buses (Mar 2024);
- Superloop delivery;
- Bus Safety Standard Rollout ongoing – over 1,300 buses now compliant;
- 268 Project Guardian Sessions (2023/24);
- eight new driver facilities;
- Equality, Diversity and Inclusion training for drivers – 2,200 trained (Mar 2024);
- 385 shelter renewals;
- Outer London bus routes to support ULEZ;
- Women in Bus and Coach;
- covert security testing at bus stations.



DRIVING INCLUSION



Bus Action Plan Milestones 2023/24 (1 of 2)

Milestone	Status	Comments	RAG
New Bus Station Design Guidelines (spring 2023)	Ongoing	Deferred to spring 2024 due to lack of resources	Red
Kingston Cromwell Rd Bus Station Renewal Start of Site (Aug 2023)	Ongoing	COMPLETE - Start on site 28 August 2023	Green
600 New Routemaster Refurbs inc,. (Mar 2024)	Ongoing	On Track	Green
ED&I Driver Training Rollout Begins (Summer 2023)	Ongoing	COMPLETE - Started in November 2023	Green
96% Bus Stop Wheelchair Accessibility (Mar 2024)	Ongoing	Slipped due to lack of resource in 2023. Now resource available, a review has been carried out on potential 'quick wins' for 24/25	Red
Countdown 3 Contract Award (Oct 2023)	Ongoing	Tender process delayed, running to revised timescale, exp May 24	Red
iBus 2 Contract Award (Nov 2023)	Ongoing	Tender process was delayed by resource issues, award exp Feb 24	Yellow
Bus Safety Standard Mandatory - all vehicles (2024)	Ongoing	Due to final testing and sign off of some elements, full specification is now likely to be late 2024 or early 2025	Red
10km of New Bus Lane (Mar 2024)	Ongoing	On Track – now at 5.4KM	Green
Thamesmead Bus Transit Concept (summer 2023)	Ongoing	Govt. to allocate £23m. Must spend by 2026 – feasibility ongoing	Green
New Service Planning Guidelines (spring 2023)	Ongoing	Delayed – Superloop priority on resource. Likely to be end of 2024	Red
1,000 Zero Emission Buses (summer 2023)	Achieved	COMPLETE	Green
1,400 Zero Emission Buses (Mar 2024)	Ongoing	On Track – currently just over 1,300	Green
Opportunity Charging Pilot R358 (summer 2023)	Ongoing	Land ownership and power upgrade issues. Now summer 2024	Red
300 shelter renewals (Mar 2024)	Achieved	Over 300 achieved by December 2023	Green
8,800 signal timing reviews (Mar 2024)	Ongoing	COMPLETE	Green
Superloop Phase 1 (Aug 2023)	Achieved	COMPLETE	Green



Bus Action Plan Milestones 2023/24 (2 of 2)

Milestone	Status	Comments	RAG
Superloop Phase 2 (Mar 2024)	Ongoing	SL5 - 3rd Feb, SL3 - 24 Feb, SL2 - 2nd Mar – On Track	Green
1m KM of Outer London mileage (Aug 2023)	Achieved	COMPLETE	Green
Bus Safety Strategy Published (spring 2023)	Achieved	COMPLETE	Green
8 driver facility builds (Mar 2024)	Ongoing	On Track	Green
1st of 500 buses fatigue detection technology Dec 2023 and all buses fitted March 2024 (Mar 2024)	Ongoing	First bus fitted in December, now likely to be June 2024 for all buses	Yellow



Challenges and Opportunities to delivering the Bus Action Plan

Area	Challenge and Opportunity
Re-prioritisation	<p>The prioritisation of Superloop in 2023/24 has meant a delay in some other areas of the Bus Action Plan. For example, the expected release of new bus planning guidelines in 2023 has been delayed to late 2024 as specialist resource was needed on Superloop.</p> <p>However, Superloop delivers against a number of other key features of the Bus Action Plan, including new limited stop services, and has delivered tangible benefits in this area instead.</p>
External delays to projects	<p>Some of our flagship projects, such as the introduction of opportunity charging and the ieTram bus on route 358 has been held up by property and infrastructure issues outside TfL's direct control. Likewise, Kingston Cromwell Road Bus Station refurbishment was delayed while we managed cost of materials pressures.</p> <p>Countdown 3 and iBus2 have been delayed by commercial issues. All however are expected to be delivered in 2024/25.</p>
Funding	<p>Resource and funding challenges at the start of the year has led to delays in achieving some actions expected to be finished in 2023/24. We have more funding clarity in 2024/25 which has enabled us to commit to suppliers which will enable us to deliver more consistently.</p> <p>However, reductions in renewals budgets will have reduced the scope of our 2024/25 milestones for the New Routemaster refurb programme, and we are less likely to achieve the 2025 completion date.</p>



Draft Bus Action Plan Milestones 2024/25 (To be confirmed and agreed) (1 of 2)

Milestone	Status	Comments	RAG
New Bus Station Design Guidelines (Spring 24)	Ongoing	Rolled over from 23/24. Expected Spring 24	
Kingston Cromwell Road Bus Station Renewal (Aug 24)	Ongoing	Start on site achieved in Aug 23 (delayed from 21/22)	
45 New Routemaster refurb inc Priority Moquettes (Mar 25)	Ongoing	Project scaled back to 650 by March 25. 45 more planned for 25/26 in current business plan.	
Driving Inclusion Training 7000 drivers trained (Mar 25)	Ongoing	9000 drivers in total out of 25,000 to be trained by 2026	
96% Bus Stop Wheelchair Accessibility	Ongoing	Target date tbc	
Countdown 3 Contract Award & Rollout (May 25 and Nov 25)	Ongoing	Contract Delayed from 23/24 – now May 25.	
25km of New Bus Lane (Mar 25)	Ongoing	10km as of March 2024. Final 15km by March 25	
Thamesmead related Milestone for 24/25	Ongoing	Thamesmead Bus Transit milestone TBC	
New Service Planning Guidelines (Mar 25)	Ongoing	Delayed - Superloop priority resource. Exp end of 2024	
1900 Zero Emission Buses (Mar 25)	Ongoing	Number TBC	
Opportunity Charging Pilot Route 358 (Summer 25)	Ongoing	Delayed from first 22/23 and 23/24 due to land ownership and power upgrades issues	
XXXX Signal Timing Reviews (Mar 25)	Ongoing	Number TBC	
Driver facilities XXXX	Ongoing	Milestone TBC	
300 buses Intelligent Speed Assistance /250 Camera Monitoring System/Acoustic Vehicle Alerting System Complete (Mar 25)	Ongoing	Total of 1800 completed when 300 achieved	





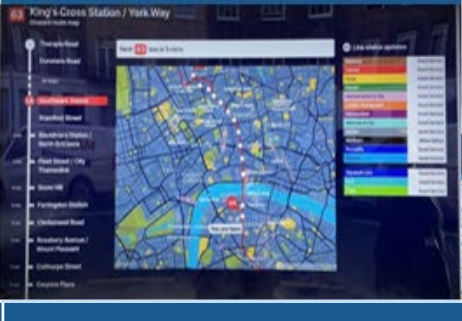

Draft Bus Action Plan Milestones 2024/25 (To be confirmed and agreed) (1 of 2)

Milestone	Status	Comments	RAG
Fatigue Detection Tech Fitment 500 buses (Jun 24)	Ongoing	Rolled over from 23/24	
Retrofit Customer Upgrades 150 buses (Mar 25)	Ongoing	Milestone TBC	
New Live Bus Arrival Products 350 bus stops (Mar 25)	Ongoing	Milestone TBC	
Shelter Renewals TBC	Ongoing	TBC – expected less than last year due to budget constraints	
Bus Priority Best Practice Guidance (Summer 24)	Ongoing	Finish date TBC	
Increased outer London services	Ongoing	TBC - link to c5% growth in Outer London during business plan	
Green Infrastructure	Ongoing	Green Infrastructure Milestone TBC	
Fatigue Detection Tech Fitment 500 buses (Jun 24)	Ongoing	Rolled over from 23/24	
Retrofit Customer Upgrades 150 buses (Mar 25)	Ongoing	Milestone TBC	
New Live Bus Arrival Products 350 bus stops (Mar 25)	Ongoing	Milestone TBC	
Shelter Renewals TBC	Ongoing	TBC – expected less than last year due to budget constraints	
Bus Priority Best Practice Guidance (Summer 24)	Ongoing	Finish date TBC	
Increased outer London services	Ongoing	TBC - link to c5% growth in Outer London during business plan	
Green Infrastructure	Ongoing	Green Infrastructure Milestone TBC	



Focus on: Customer improvements coming in FY 2024/25

Customer Experience Improvements/Enhancements

<p>On bus experience</p> <p>Getting on the bus: I'm safe, I'm comfortable, I'm informed</p>	<p>Waiting environment</p> <p>A warm, bright, comfortable, welcoming environment to wait in with up to date information</p>	<p>Real-time information</p> <p>Empowering people with reliable, proactive, relevant, accessible and tailored Real Time Information</p>	<p>Interchange experience</p> <p>Consistently seamless interchanges that reflect our truly 'integrated' network</p>
			
<ul style="list-style-type: none"> • Installing enhanced customer features (similar to those on route 63) across more bus routes • Upweighting cleaning programme on some of our most affected routes to reduce litter • Further trials for better temperature regulation on services during all types of weather conditions • Horizon scan and trialling of new customer features on select buses • Equality, Diversity and Inclusion training delivered to up to 7,500 drivers per year • Customer service training modules delivered to drivers • Updated edition of the Big Red Book for all drivers 	<ul style="list-style-type: none"> • Rolling out a more real-time information products across a wider estate of bus stops, reaching more customers and maintaining pre-existing displays • Rolling out QR codes at all 19,000 bus stops to help customers with stop-specific live arrivals • Trialling a new best-in-class shelter product that addresses customer safety and accessibility needs • Upweight shelter renewals programme 	<ul style="list-style-type: none"> • Trialling Automated Passenger Counting software on select buses to provide live and more accurate passenger busyness information for customers and a wheelchair occupancy trial • Development of a product for digitally excluded customers to replace our SMS live arrivals service, to access live bus information • Development of Predictive Diversions and Better Disruption Sharing to improve the standard of information shared with customers • Updates to TfL Go which will include bus routes on geographic maps and live bus locations 	<ul style="list-style-type: none"> • Introducing real-time information at more bus stations • Improving signage to onward bus services by spring 2025 • Scoping design guidance for a best-in-class bus station, to be delivered in FY 2025/26 • Improving Signage to onward bus services at a further 15 London Underground (LU) stations • Introducing real-time bus arrival displays at LU stations with key interchanges



Focus on:
Bus Access to Hospitals

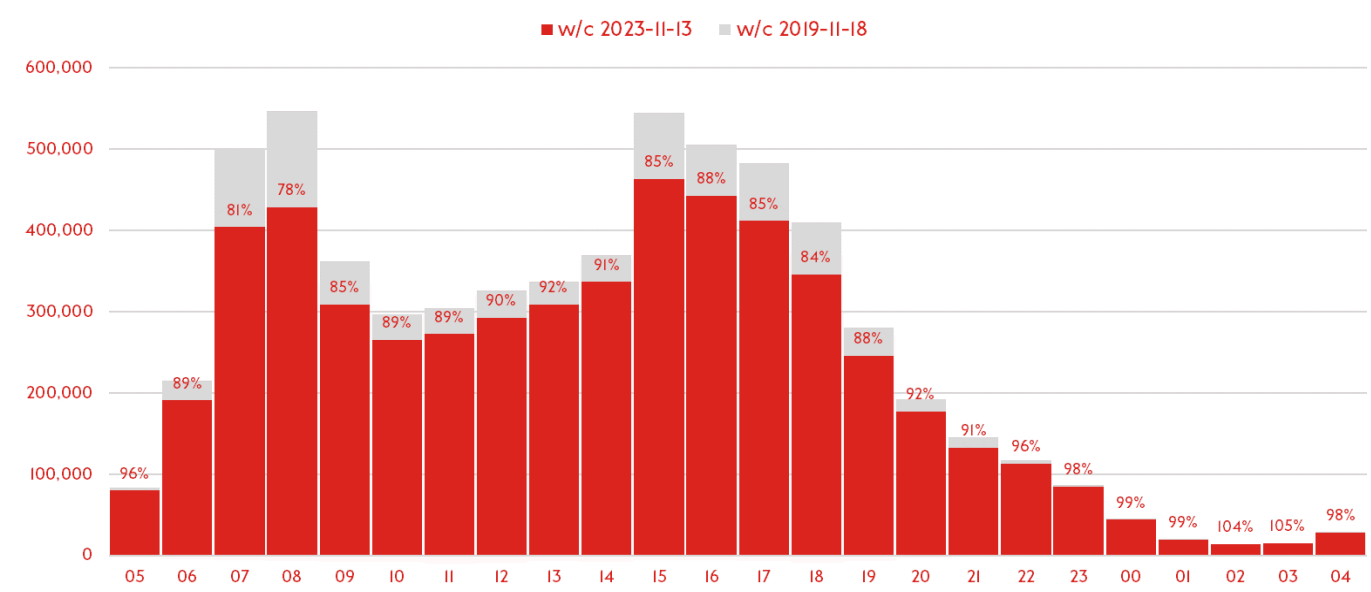
- Bus service change schemes will include improving access to hospitals as part of their appraisal, and recommendations as appropriate.
- Recent projects include proposals to restructure bus routes to give better links:
 - in the Waltham Forest area to Whipps Cross Hospital;
 - in the Uxbridge area to Hillingdon Hospital;
 - in the Sutton area to the London Cancer Hub and the Royal Marsden Hospital.
- New Superloop services serving hospitals including Northwick Park, Ealing and Queen Mary's Sidcup.
- All proposed bus route change consultations include Equality Impact Assessments which examine in detail the impact of a proposal on those with protected characteristics including those who may need to access hospitals more frequently such as:
 - older people;
 - pregnant women and mothers with young children;
 - those with disabilities including their carers.
- The outcome of these assessments is to identify appropriate mitigations to address any negative impacts of a proposed bus service change including but not limited to better bus stop facilities or new protected pedestrian crossings at interchanges.



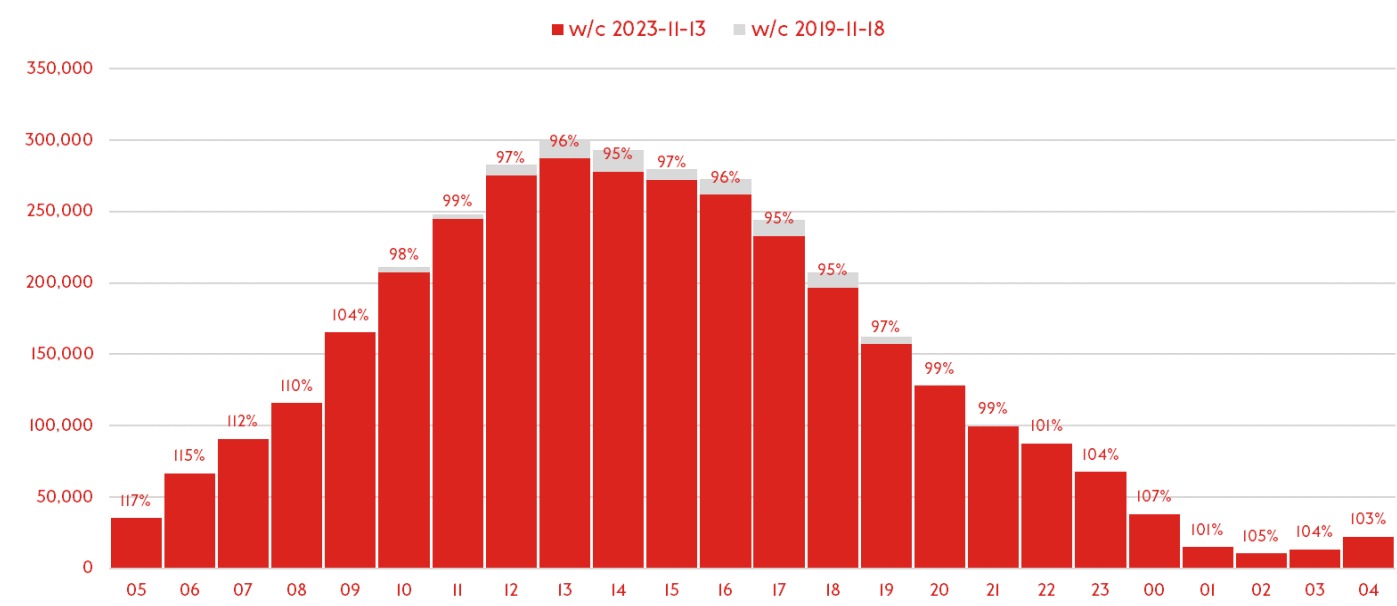
Focus on: Bus Patronage – weekdays and weekends

- Weekday patronage is over 80 per cent pre pandemic levels
- Weekend patronage has recovered to over 90 per cent pre pandemic levels
- Sunday recovery has been particularly strong at 99 per cent

Weekday (0-24h) bus boarders by hour for ALL BOROUGHES

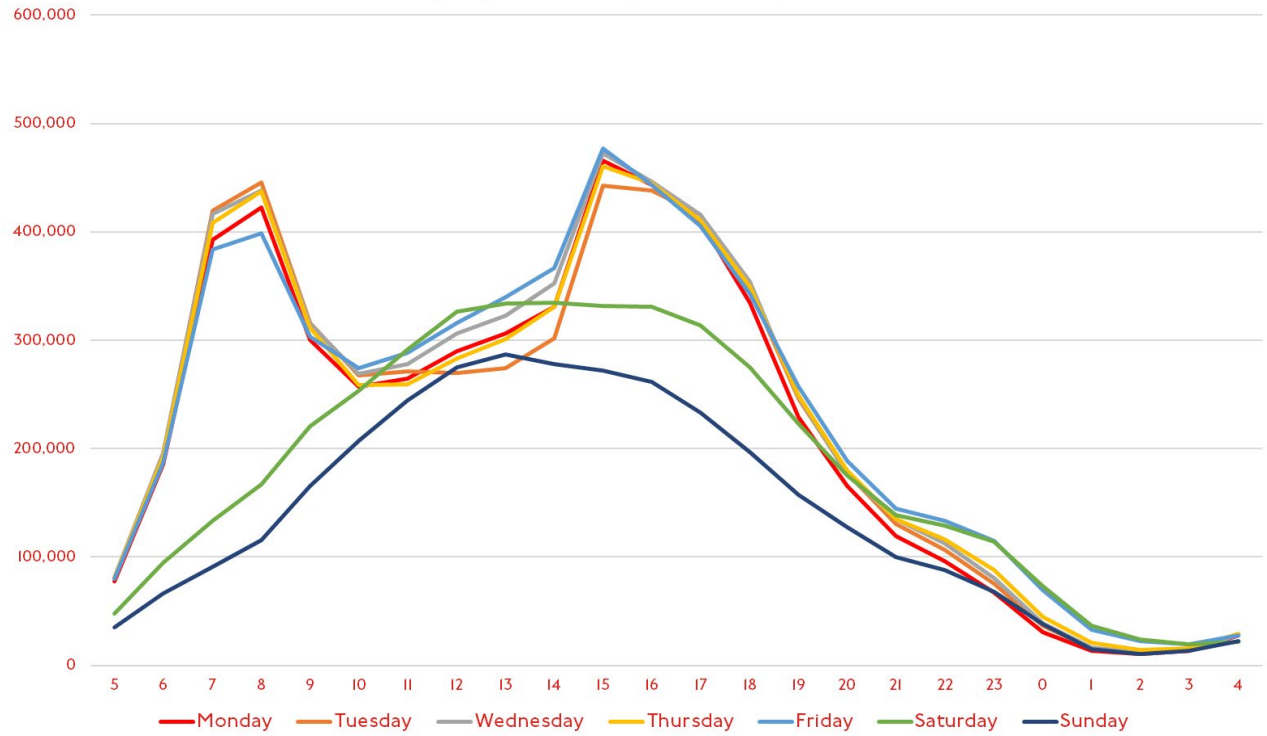


Sunday (0-24h) bus boarders by hour for ALL BOROUGHES



Focus on: Bus Patronage – weekdays and weekends

Bus boarders by day and hour [w/c 13/11/23] for ALL BOROUGHGS

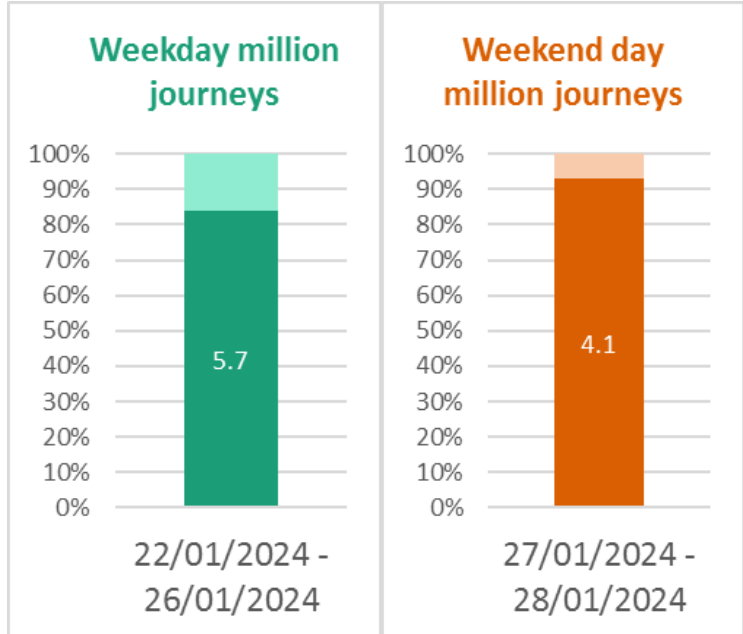


Weekday demand remains higher than on weekend days

Monday and Friday morning recovery is lower than Tuesday to Thursdays

But the high level of school travel means there is less weekday variation on bus than London Underground

Strong Friday evening demand offsets the lower morning peak

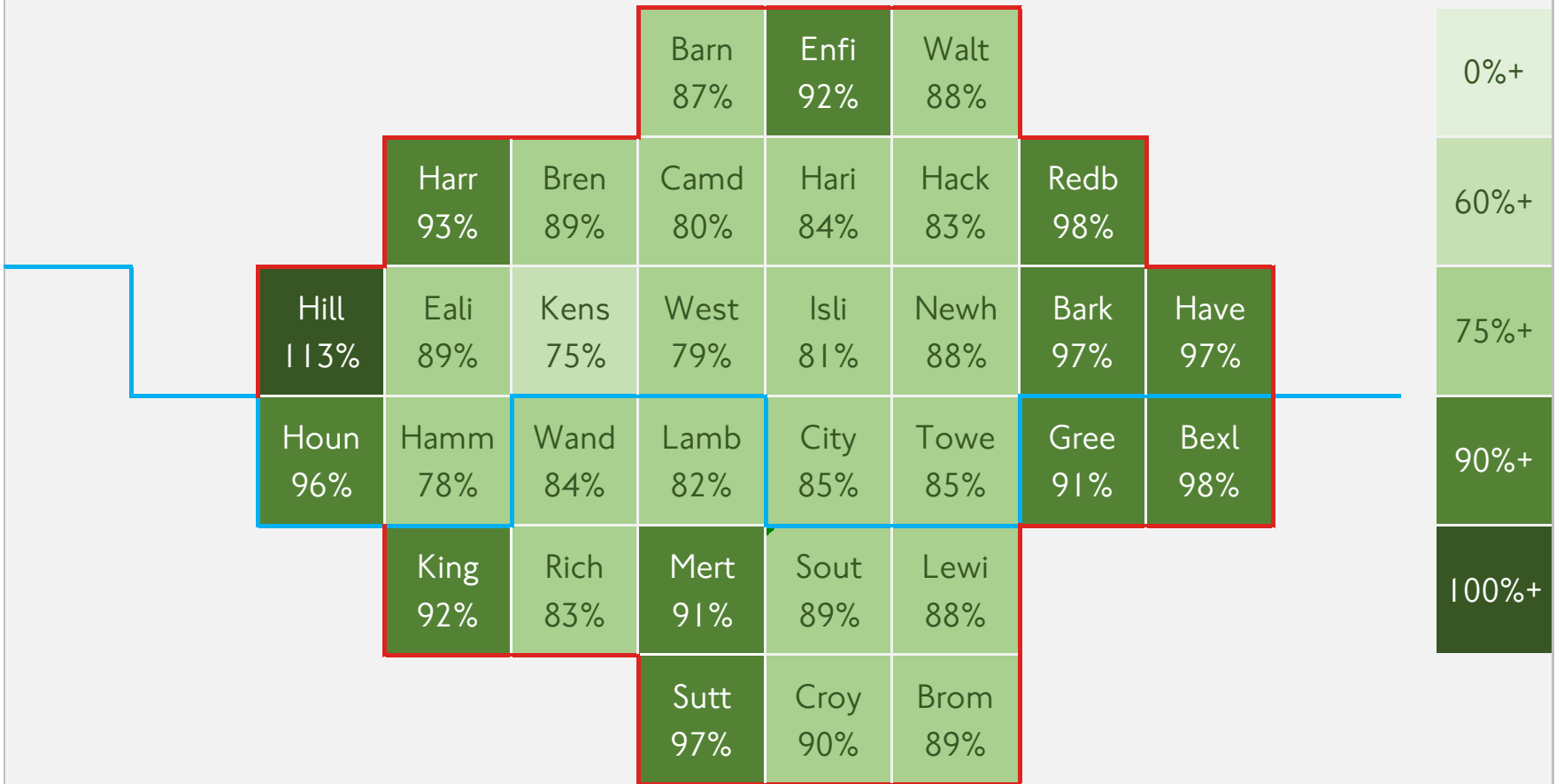


Focus on: Bus Patronage – Inner and Outer London

- Outer London has grown more strongly than Inner London on all day types
- Outer London recovery ranges from 92 per cent on weekdays to 101 per cent on Sundays
- We are focussing bus investment on Outer London where demand is recovering more strongly

Weekday (0-24h) bus boarders by local authority

[w/c 13/11/23 versus w/c 18/11/19]



Source: PTSP/TAPS



Recent initiatives have delivered growth

Two flagship Bus initiatives have returned positive growth in both patronage and revenue in the last two years.

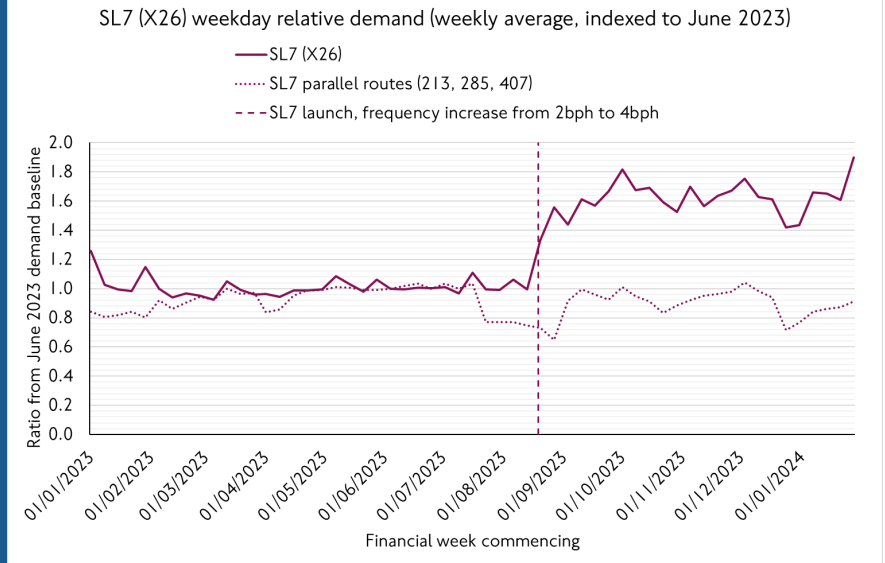
Focused investment on both initiatives has enabled us to bring together varying strands of the Bus Action Plan to deliver a more cohesive customer offer.

Growth in both cases is based on the particular routes involved, but the benefits extend to a broader network of customers accessing and benefitting from the relevant stops, bus priority interventions etc. The investment payback is therefore greater.

March 2023 – March 2024



A network of 10 express bus routes orbiting outer London to improve connections and journey times between key outer London town centres and transport hubs.



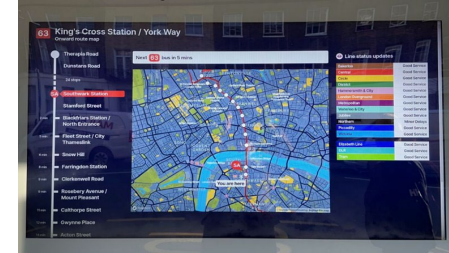
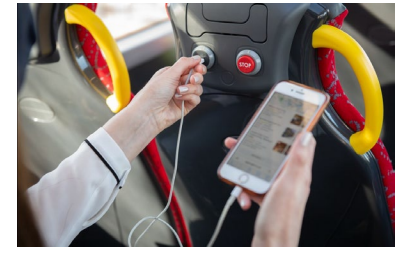
SL7 frequency doubling has resulted in a 62% increase in patronage between June-October 2023. Some parallel routes have seen a decline as a result of switching.

Consultation responses overwhelmingly suggest that these routes will provide genuine alternatives to private car use.

April 2021 – March 2023



A package of co-ordinated enhancements to improve the quality of journeys on the route to deliver a visible “step-change” to customers.



Net increase on the corridor of 3%

18% revenue recovery to pay back over 5 years*

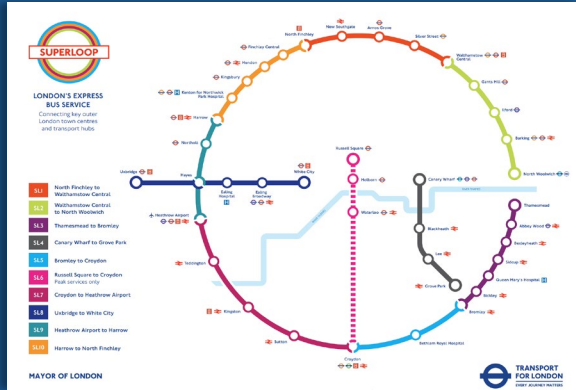
Customer satisfaction increased +11 percentage points from 70 to 82%

*Assumes worst case. If amortised across wider network benefits, this would pay back at faster rate

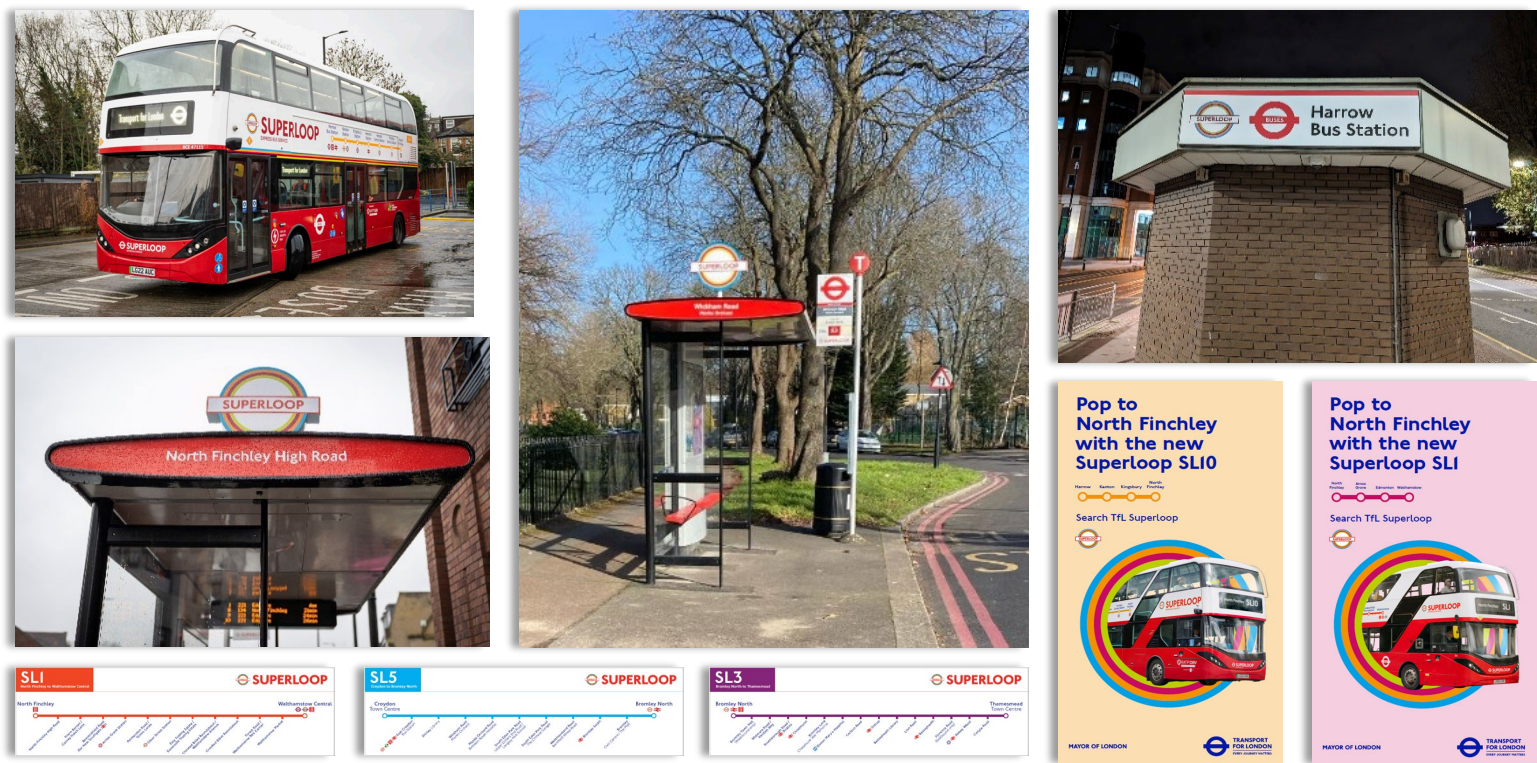
Focus on: Superloop

TfL launched its Superloop express bus network in July/August 2023 with a programme of branding, marketing and selected service enhancements on four existing express bus routes, plus the introduction of five new express services all predominantly serving outer London.

We have monitored performance of the four re-branded services but it is too early to provide data on the newer services given they are only launching now, so demand has yet to settle. We will provide an updated review inclusive of all routes in autumn.



The increase in patronage on the re-branded Superloop routes was 15 percentage points higher than the network increase over the same period. When combined with parallel routes, the increase was three percentage points higher than the network increase.



Positive experiences on Superloop services have meant the service has quickly developed loyalty amongst customers. Nine in 10 customers say that their experience on the Superloop is better than other TfL buses.