

Date: 10 July 2024

Item: Bus Ridership and Superloop Demand Monitoring

This paper will be considered in public

1 Summary

1.1 This paper sets out the actions we are taking to attract more customers to the bus network and a summary of trends in bus journeys. The paper also provides the initial findings from our monitoring of the Superloop routes. Phase 1 focused on creating the Superloop brand, utilising existing routes SL8, SL6, SL7 and SL9 completed in August 2023. During Phase 2 we introduced five new routes SL10, SL1, SL5, SL3 and SL2, completing the outer London 'loop'. Overall, across Superloop there has been faster growth in demand compared to the wider network, with ridership on the Phase 2 routes increasing by 16 per cent since June 2023.

2 Recommendation

2.1 **The Panel is asked to note the paper.**

3 Background

3.1 We set out our Bus Action Plan in March 2022 with the aim of attracting more customers to the bus network and improving bus performance by increasing priority to buses and working with boroughs to minimise delays caused by planned road works.

3.2 Alongside expanding the outer London bus network, one element of the Bus Action Plan was to trial new services, and in July 2023 we launched the first phase of the Superloop express bus network. This included a programme of branding, marketing and selected service enhancements on four existing express bus routes mainly serving outer London.

3.3 SL6 (formerly the X68) is a peak only express service between Croydon and Russell Square. SL7 (formerly the X26) which operates between West Croydon and Heathrow had its frequency enhanced from two buses per hour (bph) to four bph service. SL8 (formerly the 607) between White City and Uxbridge saw an increase in operating hours. SL9 (formerly the X140) is an express bus route operating between Heathrow and Harrow. All benefitted from branding in Superloop livery.

3.4 Five further routes were introduced between November 2023 and March 2024 as part of Superloop Phase 2. The SL1 operates between North Finchley and Walthamstow, SL2 between Walthamstow and North Woolwich, SL3 between

Thamesmead and Bromley, SL5 between Bromley and Croydon, and SL10 between Harrow and North Finchley.

- 3.5 The SL4, which will operate between Canary Wharf and Grove Park, will be introduced upon opening of the Silvertown Tunnel in 2025.

4 Passenger demand monitoring

Bus ridership

- 4.1 Bus ridership continues to grow across the network with 1.86 billion bus journeys being completed during financial year 2023/24. Compared to the previous year, bus ridership increased by five per cent in 2023/24 but remains below 2019/20 levels where bus ridership reached 2.05 billion. Figure 1 shows bus patronage between 2008/09 and 2023/24.

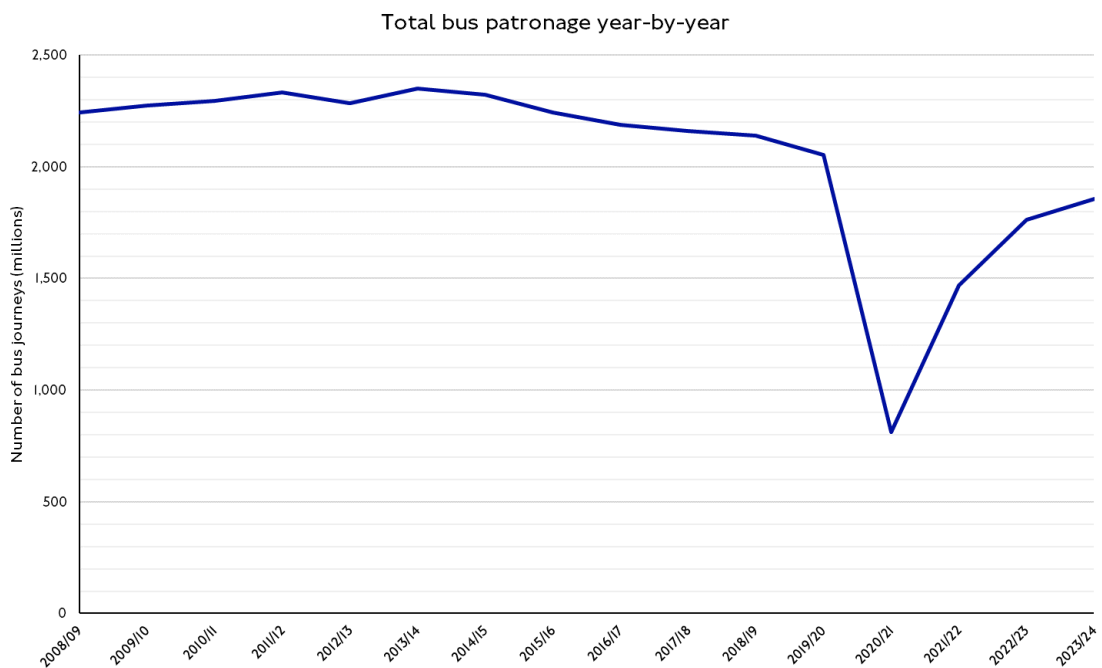


Figure 1: Annual bus patronage on the TfL network between 2008/09 and 2023/24

- 4.2 In total, 121 million bus journeys were undertaken in central London in 2023/24, an increase of six per cent compared to the previous year. Bus journeys in inner London reached 635 million in 2023/24, an increase of two per cent compared to the previous year. There were 1,200 million bus journeys made in outer London in 2023/24, a seven per cent growth compared to the previous year. Figure 2 shows the annual bus ridership, broken down by central, inner and outer London, between 2008/09 and 2023/24.

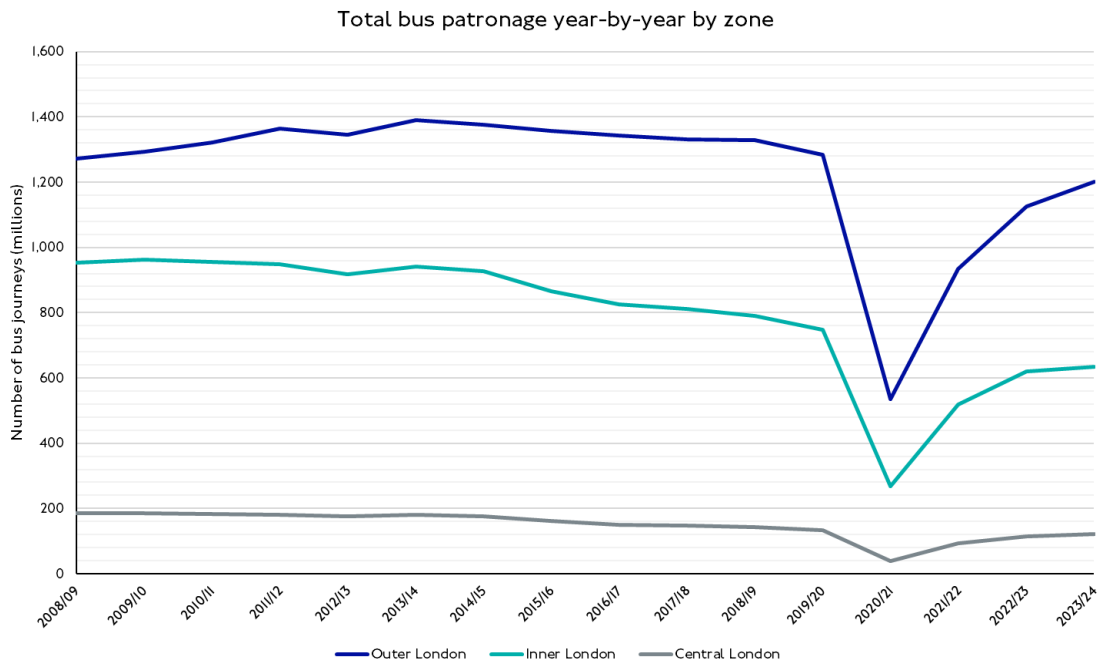


Figure 2: Annual bus patronage by zone between 2008/09 and 2023/24

Superloop reliability by route

- 4.3 SL1, SL5, -, SL10 are performing well and better than the contractual minimum standard with bus speeds in line with expected performance.
- 4.4 SL2 continues to improve and reliability in Period 2 of 2024/25 (28 April to 25 May 2024) was better than the minimum contractual performance standard. Again, bus speeds are in line with expected.
- 4.5 SL3 continues to improve since its introduction on 24 February 2024. In addition to disruption caused by roadworks there were some initial challenges with the vehicles used on the route. These are largely now overcome and performance is improving. TfL continue to work with the operator to improve vehicle reliability.
- 4.6 SL6 operates 12 return peak journeys during Monday to Friday through inner and central areas and runs as a limited stop service on a portion of its route. The route is not currently meeting performance standards due to disruption that has been caused by roadworks on the stopping section of the route. We are working with the operator on revising how this route is monitored and run to ensure that it better reflects actual passenger experience.
- 4.7 SL7 is currently the longest route operating in London. It is therefore susceptible to traffic conditions as it travels through key town centres and shopping hubs in outer London. If permitted, we would seek to consult on reducing the length of the route to improve reliability.
- 4.8 SL8 has not met the minimum performance standard due to roadworks on the route since launch. A scheme to improve its reliability is in progress and will be implemented by time of publication. This scheme adds additional resource into the schedule to ensure that it is better matched to prevailing road conditions. We

required the performance of the route to be monitored for a period of time before making any decisions on a scheme.

- 4.9 SL9 has not met its minimum performance standard, however a scheme to improve reliability was implemented in June 2024 and is being monitored. This scheme was in part implemented to redistribute running time with the schedule to ensure that it is better matched to prevailing road conditions since its launch.

Superloop demand monitoring

- 4.10 The Phase 1 and 2 Superloop route weekday usage between June 2023 and May 2024 is shown in figure 4. Figures 5 and 6 shows the change in corridor demand relative to June 2023 for Phase 1 and 2 routes respectively.

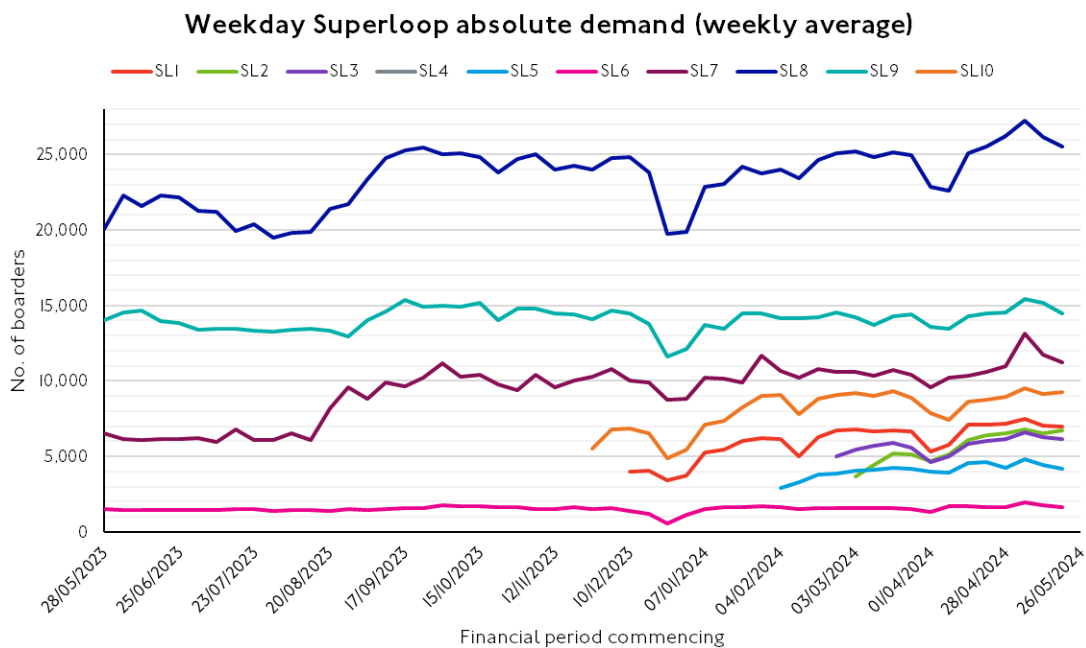


Figure 4: Weekday Superloop route demand between June 2023 and May 2024

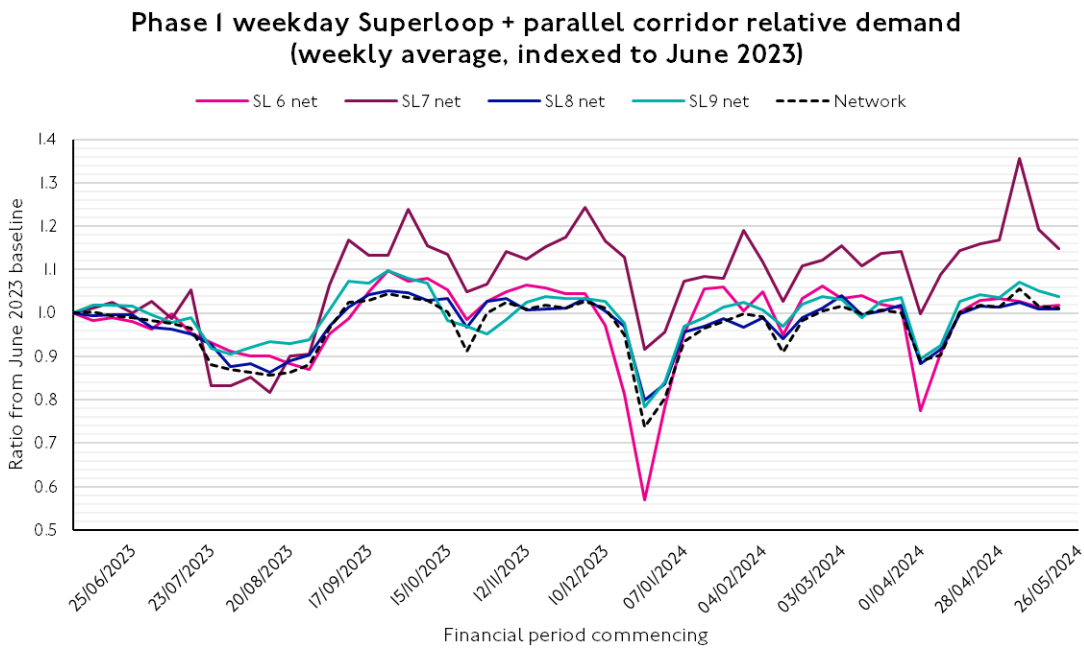


Figure 5: Change in weekday demand relative to June 2023 on Phase 1 routes

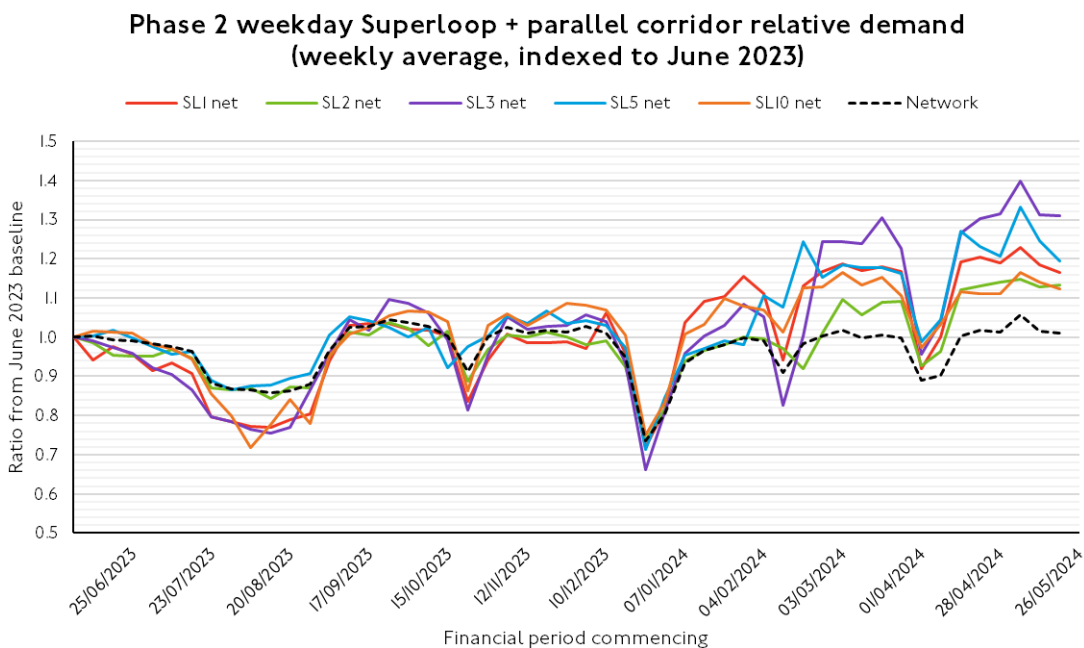


Figure 6: Change in weekday demand relative to June 2023 on Phase 2 routes

- 4.11 The monitoring of patronage on the Superloop routes is still ongoing. For Phase 1 routes, the response is expected to be relatively fast compared with the impacts of introducing a new route. We still expect to see further growth on the Phase 2 routes over the next year.
- 4.12 Research shows that an increase in quality as a result of changes in service level, information provision or other enhancements will increase passenger demand for

that service. Customers may switch from other bus routes which run parallel to that route in order to use the enhanced service. As a result, we have looked at the change in demand on parallel bus routes where stops are within 400 metres of a Superloop route in order to calculate the impact on corridor demand.

Results by route

- 4.13 Between June 2023 and May 2024, our bus network demand grew by two per cent.
- 4.14 SL6 patronage increased by 20 per cent in the same period. This period also included restructuring of services between Holborn and Waterloo; some of the change may be attributed to customers switching to SL6 to make short journeys to and from Waterloo. Corridor demand grew by two per cent.
- 4.15 SL7 saw the largest increase in patronage at 91 per cent as a result of the doubling in service frequency combined with the Superloop launch. Once the change in patronage on parallel routes was taken into account, corridor demand increased by 21 per cent.
- 4.16 SL8 patronage increased by 18 per cent over the same period, partly as a result of services operating earlier in the morning and later at night on all days of the week combined with the Superloop launch. Once extended operating hours was taken into account, the net increase was one per cent. The absence of growth on the SL8 corridor is an indication of abstraction of demand from the parallel routes coupled with performance issues on the SL8.
- 4.17 SL9 is an established express route, introduced in late 2019, and did not see any service enhancements. Patronage grew by two per cent on the route while the corridor demand grew by five per cent.
- 4.18 Recent data shows a faster growth in bus demand on the Phase 2 Superloop corridors compared to the wider bus network. In May 2024, the increase in average weekday corridor demand on Phase 2 routes compared to June 2023 was 16 per cent higher than the network. Demand on Superloop routes continues to grow faster than the rest of the network.
- 4.19 We are reviewing the provision of bus priority on the Superloop corridors and have identified a number of areas where we could make material journey time and/or reliability improvements. These are subject to feasibility and local engagement. Further details will be available in late Summer.
- 4.20 We will continue to monitor the demand on Superloop corridors, and what lessons can be taken from this approach to apply more widely to the bus network as part of the Bus Action Plan.

Superloop customer perceptions research

- 4.21 In November 2023, we carried out the first wave of customer research to test understanding of the concept and perceptions of Superloop branding. The sample of customers were users of the existing, phase 1 routes (SL8, SL6, SL7 and SL9). The results were positive with over 90 per cent of customers being spontaneously

aware (unprompted) of the name and route they were using. This increased to 99 per cent when prompted.

- 4.22 In May 2024, we concluded the second and final wave to test understanding and awareness of the new routes (SL10, SL1, SL5, SL3 and SL2).
- 4.23 Prompted awareness of Superloop scored 92 per cent, with unprompted awareness being considerably lower at 44 per cent. However, the routes are still relatively new and we expect awareness to grow organically over time. When asked if Superloop services were better than other buses, 88 per cent of customers said yes and 93 per cent stated they would use the service again. Superloop is being perceived well with 90 per cent of customers stating that the introduction of Superloop shows that TfL cares about its customers. Overall, customer understanding of the network is high and the unique branding is having a positive impact.

Superloop lessons learnt

- 4.24 The timescales for completing the delivery of Superloop required us to significantly alter our approach to stakeholder engagement and commercial discussions with bus operators. Although challenging, we have delivered a brand-new network of buses that will only serve to improve our transport offer and acts as a clear demonstration of our ongoing commitment to enhancing transport for Londoners.
- 4.25 Funding constraints impacted our ability to replace or upgrade as much bus infrastructure, such as, shelters and welfare facilities, etc as we would have liked.
- 4.26 Bus priority measures are key to delivering a reliable bus service for Londoners and we will continuously strive to implement these across the bus network, particularly on our express services.
- 4.27 There were, as with any change of this size, a number of challenges but we successfully delivered by being focussed, innovative and dynamic in our programme management, decision making and stakeholder engagement. We are excited about developing the existing Superloop network as demand grows and delivering additional routes.

List of appendices to this report:

None

List of Background Papers:

The Travel in London report, available on the TfL website (<https://tfl.gov.uk/corporate/publications-and-reports/travel-in-london-reports>), presents a summary of the trends in bus ridership and performance over a longer period.

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