



Parts of the central bus network are scheduled to run at less than walking speed
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Why London needs a new bus strategy

A combination of factors from declining speeds and the prioritisation of cycling to the rise of Uber are resulting in bus passenger numbers in the capital going into decline. **David Leeder** argues a complete rethink is needed

For over 20 years, the debate about bus policy in Britain has been founded on a logical error – “Bus patronage in London is rising. London buses are regulated. Therefore, London patronage is rising because of regulation.”

This analysis was always grossly simplified, conflating a variety of independent factors, including London’s uniquely favourable demographics, its high levels of subsidy, and wider traffic planning priorities. What is now clear is that London has passed a tipping point: London’s current policy mix now offsets its uniquely favourable demographics. So London bus traffic is falling, quite quickly.

The decline in numbers

There have been seven successive quarters of year on year decline (starting in Q1 2015). Bus journeys from April to June 2016 were 18 million fewer than for the same period in 2015, a 3% drop. 84 million journeys have been lost over a rolling 12 months, a 4% drop. Traffic in the second quarter of last year had fallen back to the equivalent number in 2010.

Speed effects are offsetting positive demographics

London continues to enjoy demographic advantages that don’t apply in other large UK conurbations. Population is rising strongly, car parking

is constrained, and the density of housing, retail and employment have been growing for years. Only the English cathedral cities show these features, albeit on a micro scale.

In contrast, the major metropolitan areas are characterised by static or falling population, weak city centres (sometimes disguised by flagship retail or office developments) and anaemic economic growth.

So why is London bus patronage falling so sharply?

Anyone who has attempted a bus journey in central London over the last 18 months will have their own hypothesis, but the competitive position of the London bus is becoming weak.

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“The old idea of the omnibus, catering for a huge variety of journey types and segments, is fading away”

A number of factors are at work.

Rail capacity in the capital has been rising for 15 years. The Jubilee Line and DLR have been followed by more capacity and lower fares on the Overground, and from 2019, Crossrail. Even awkward multi-leg journeys are now much faster than the equivalent bus links, and the price premium is concealed by the opacity of the Oyster Card pricing regime. The revenue impact of bus users switching to rail is likely to be positive for TfL overall.

Large parts of the central bus network are now scheduled at less than walking speed. Moreover, peak spreading means that bus journeys are often intolerably slow throughout the day, at weekends, and even beyond midnight and well into the early morning.

The congestion charge has not kept up with rising demand, either in the level of the charge or the duration of congestion. The high operating costs of the charge mean that net revenue is insignificant to TfL's overall finances, and the political will to vary the price has quietly disappeared.

London's good work in the 1990s with bus priorities has been slowly eroded by a variety of measures designed to improve the emphasis on walking and cycling.

Both Boris Johnson and Sadiq Khan have actively prioritised cycling, which has taken on a cultural aspect. To ride a bike in London is to publicly signal your hipness, environmental concern, healthiness and moral virtue. Buses have slipped down TfL's priorities. Reallocation of road space to cycles is removing buffer capacity, so that even minor traffic problems create significant disruption, and large volumes of cyclists dictate traffic speeds in shared bus/cycle lanes.

TfL's laudable efforts to improve conditions for walking must be eating away at short hop journeys, which are often quicker on foot.

Worsening bus speeds simultaneously harm revenue, increase bus costs, and improve the attractions of rail.

TfL has been shortening bus routes since the 1980s, but we have now reached an absurd position where even three-

mile journeys have become extremely slow in a segment in which buses should be highly competitive.

Meanwhile Uber is expanding steadily, eating into traditional London bus markets, as well as those of the Hackney and private hire cabs. Its position is increasingly anomalous given TfL's grip over almost every other element of London's transport mix, leaving Uber as the only "free market" transport mode, not (yet) under TfL economic control.

Most of these are secular trends, unlikely to be reversed quickly.

There has also been a loss of collective memory. Never the leanest of organisations, TfL grew increasingly flabby during the years when taxpayer funding was plentiful. Recent cuts to TfL overheads are therefore overdue. However, the rush to reduce costs has resulted in the departure of a significant number of TfL's brightest and best – the hardworking backroom managers who pulled the whole thing together, and achieved the huge improvements of the Hendy era.

What is the bus network for?

It therefore seems clear that the London model as we have known it since the 1990s cannot carry on. TfL will need to think clearly about what the future bus network is for, and who it is intended to serve.

There are three options.

Option 1 – Do Minimum

TfL could accept that bus speeds will keep falling, and that costs will keep rising. This was London Transport's policy from the 1950s to the 1980s. In this scenario, the only way to keep the network going will be through subsidy. Given the Treasury's desire to eliminate TfL's operating grant, this will require cross-subsidy from rail to bus. And with rail's own tendency to cost inflation, such an approach seems highly unlikely to work. Bus mileage would need to be cut, year by year, as demand reduced.

TfL would need to decide where the bus has competitive advantage. The old idea of the omnibus, catering for a huge variety of journey types and segments, is fading away. Since the 1970s, London has moved towards an undifferentiated, single product offering. Compared with some bus networks outside the capital, London buses are utilitarian, poorly marketed, and unfriendly.

Long-distance buses (the cross-London Green Lines of the 1930s and 1950s), have almost totally faded away, victims of chronic congestion and rail competition. They are now being joined by those long sub-



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Greater rail capacity, as on London Overground, has attracted passengers from buses, while road space has been reallocated to cycling

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urb-to-centre red bus routes that were the backbone of the London business.

In recent years, bus policy has tended to target what I would call “second order” objectives. The pursuit of wheelchair accessibility as an end in itself has led to awkward interior layouts that make travel less attractive for the commuter, the shopper and the “ambulant disabled” – the elderly, and passengers with luggage or small children – who constitute the mass of the market.

The latest mayoral priority is to reduce the environmental impact of buses. This may be laudable, but is unlikely to do anything to increase patronage, and will certainly increase medium-term costs, locking TfL into experimental technologies, more expensive buses and residual value risk.

Option 2 – a social service

This is the standard model in many European cities. Buses essentially fulfil a niche role, as rail feeders, education transport, suburban links for schools and shopping, and a skeletal network for people too old or too frail to cycle or use rail services.

This option would see significant lopping of mileage that parallels rail routes, presumably focused on central and inner London. Growth would continue in the suburbs as population rises, and where the pattern of travel is too complex for rail to become the dominant mode.

TfL has been signalling some moves in this direction with the planned closure of Oxford Street and some “temporary” cuts becoming permanent.

Option 3 – radical bus priority

There is no doubt that buses could do more in London, but it seems unlikely that there is currently much political ability to introduce widespread bus priority of the type needed to turn the current trends around. There are simply too many competing demands for road space, and too much political capital invested in cycling. This probably means that the central and inner London network is doomed to major cuts.

But across London as a whole, there will be corridors where radical bus priority could be applied. This would be politically difficult, but undoubtedly cheaper than light or heavy rail alternatives.

In conclusion, the current model has begun to fray. This should act as an alarm signal to those provincial cities which believe that public control is the one-way route to a utopia of rising demand and low fares. Equally, London itself may need to borrow some of the marketing techniques that hard-pressed provincial operators have long needed just to remain in the game.