



Understanding the economic contribution made by bus users to the economic health and viability of London's town centres: Headline research findings

- Bus Priority Steering Group Meeting
- Presented by Tony Bowen
- June 2nd 2009

Research and Development projects

Bus lane guidance document



Guidance on the design of bus lanes in London

Transport for London

- Purpose of this study
- What did a previous study show
- How did we go about it
- Working in partnership (Synovate, Customer research)
- Main findings
- Next steps

Previous study on Town Centres (2003) showed that:

- Bus users contribution to the economy were at least as great as car users contribution to the local economy
- Majority of town centre users were widely supportive of measures related to bus priority

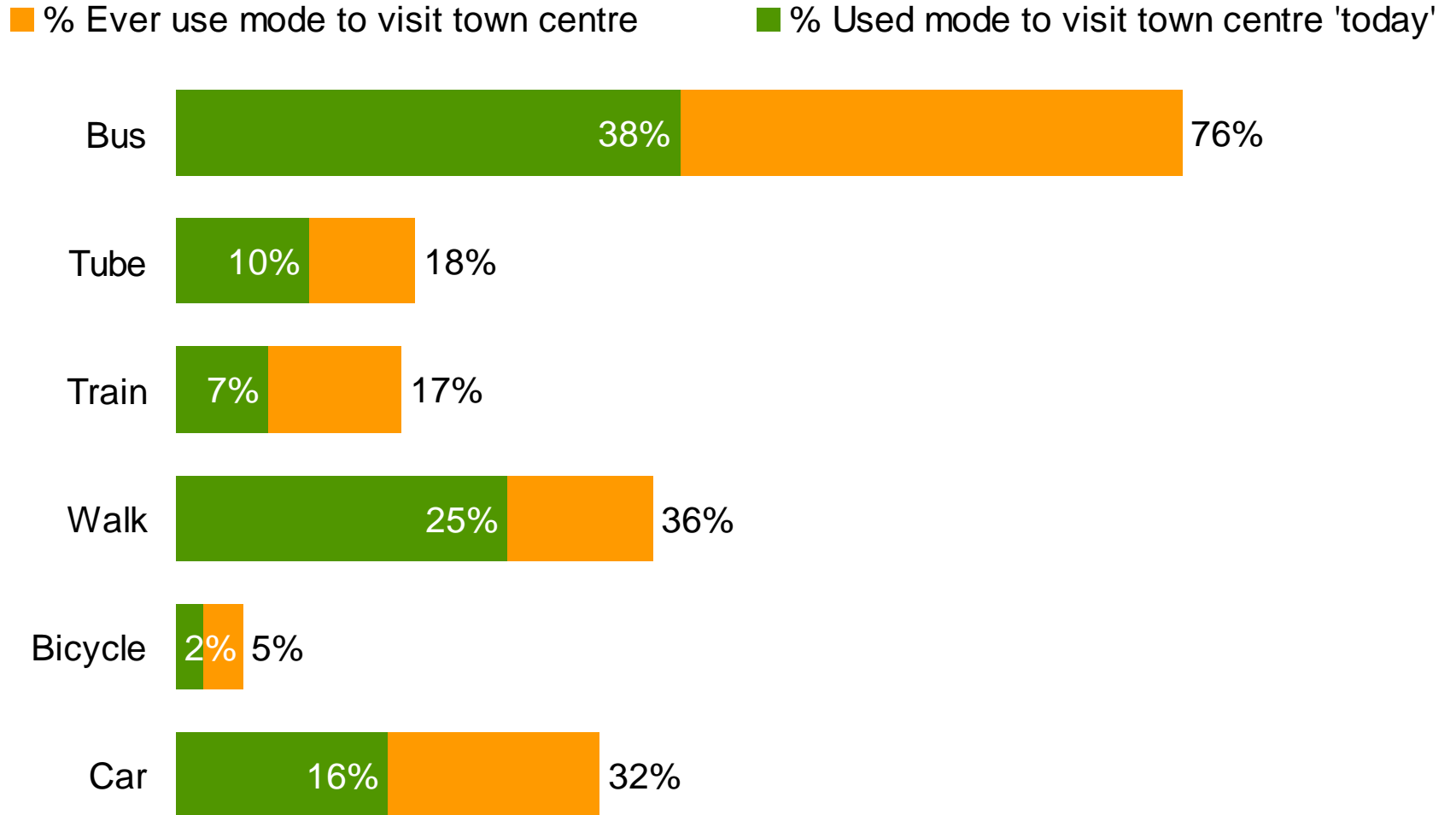
- Objectives
- Determine the shopping behaviour, frequency and spend of bus customers in specified town centres
- Compare the shopping behaviour and financial contribution of bus customers to those of car users and users of other modes
- Explore perceptions of different modes, and specific attitudes to bus use and bus service provision

- **4,907 face to face interviews with people across 15 London town centres:**
 - **Central London:** Oxford Street, Kensington High Street
 - **Main suburban:** Bromley, Clapham Junction, Croydon, Enfield, Kingston, Richmond Romford Wood Green
 - **Other Suburban:** Camberwell, Chingford, Mare Street Hackney, Neasden, Wembley

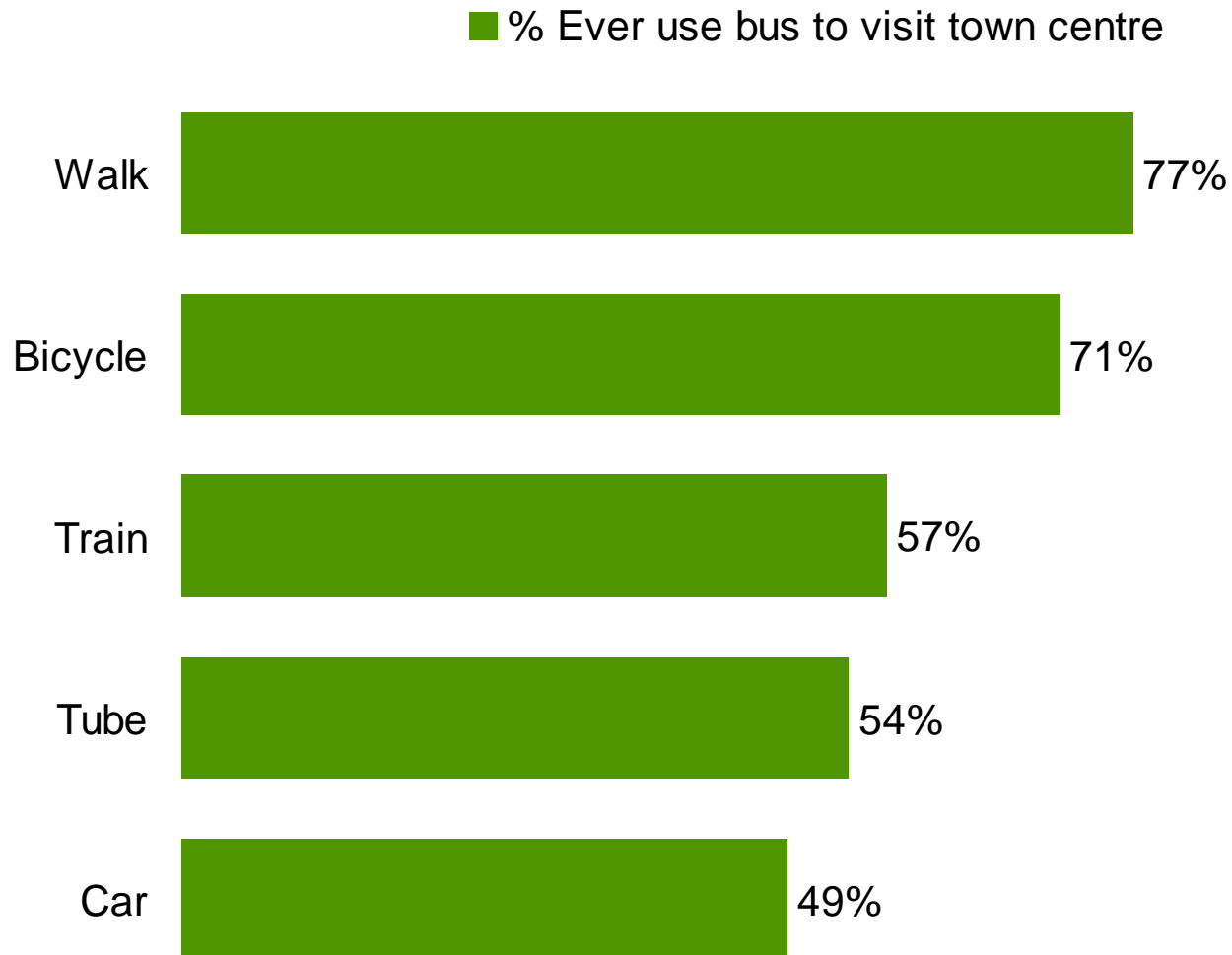
- **Buses are currently highly important to town centre prosperity**
 - Most widely used mode for almost all town centres
 - Those who used other modes also use buses
 - Spend at least as high as car users
- **Bus services and bus priority measures are viewed positively**
 - Current bus users are satisfied
 - Widespread support for bus priority measures
 - Some scope for increasing bus usage further

Buses are currently highly important to town centre prosperity...

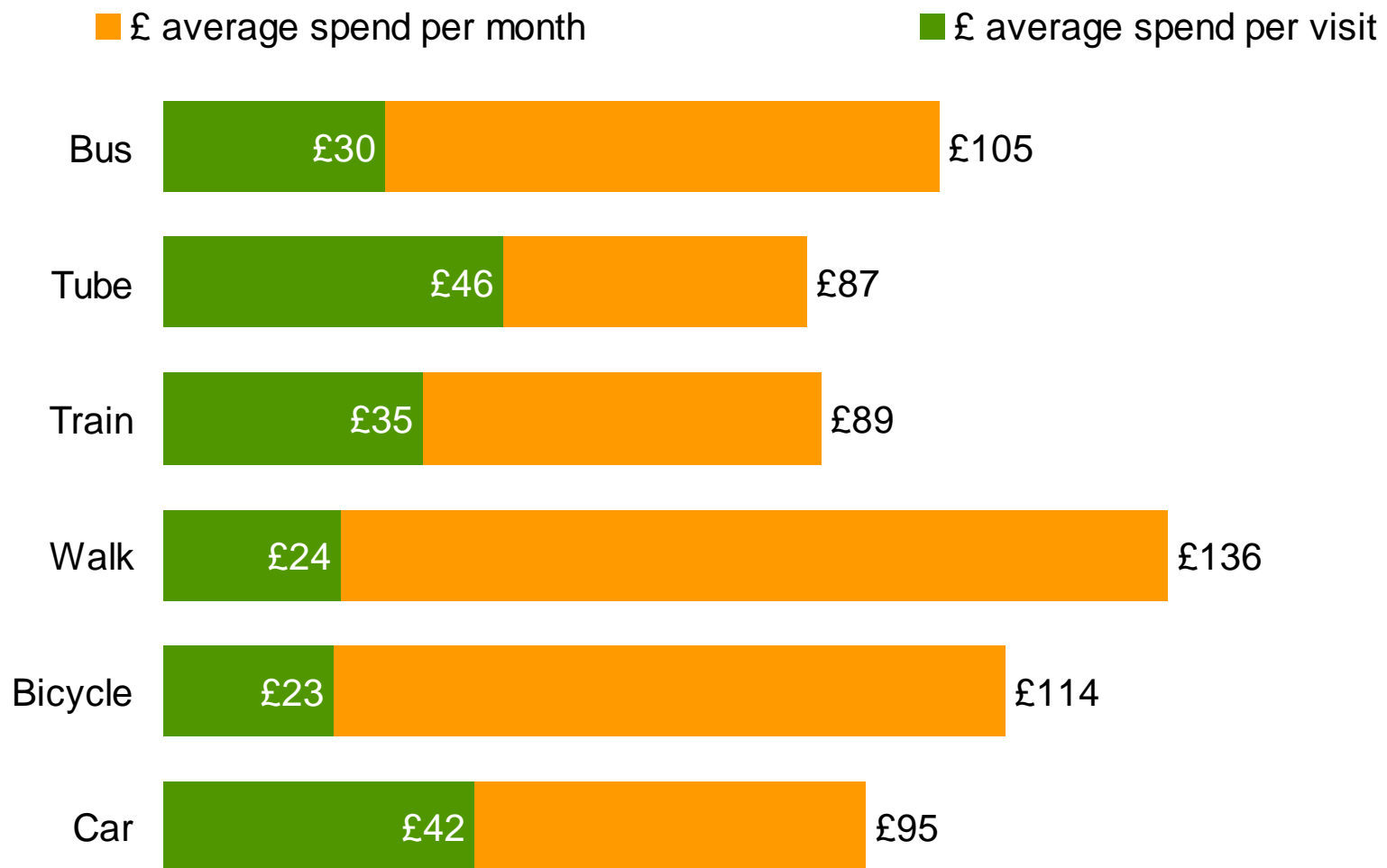
8 **Bus is the most widely used mode**



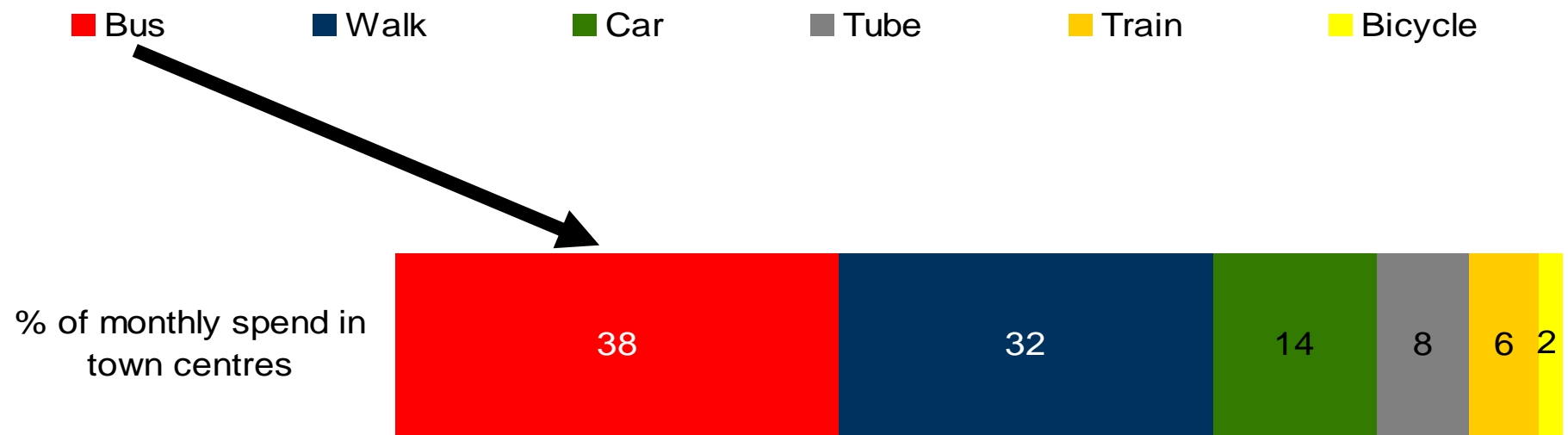
Those who used other modes also use buses



Bus users spend more per head per month than car, train and tube users



Bus users contribute the biggest proportion of monthly spend

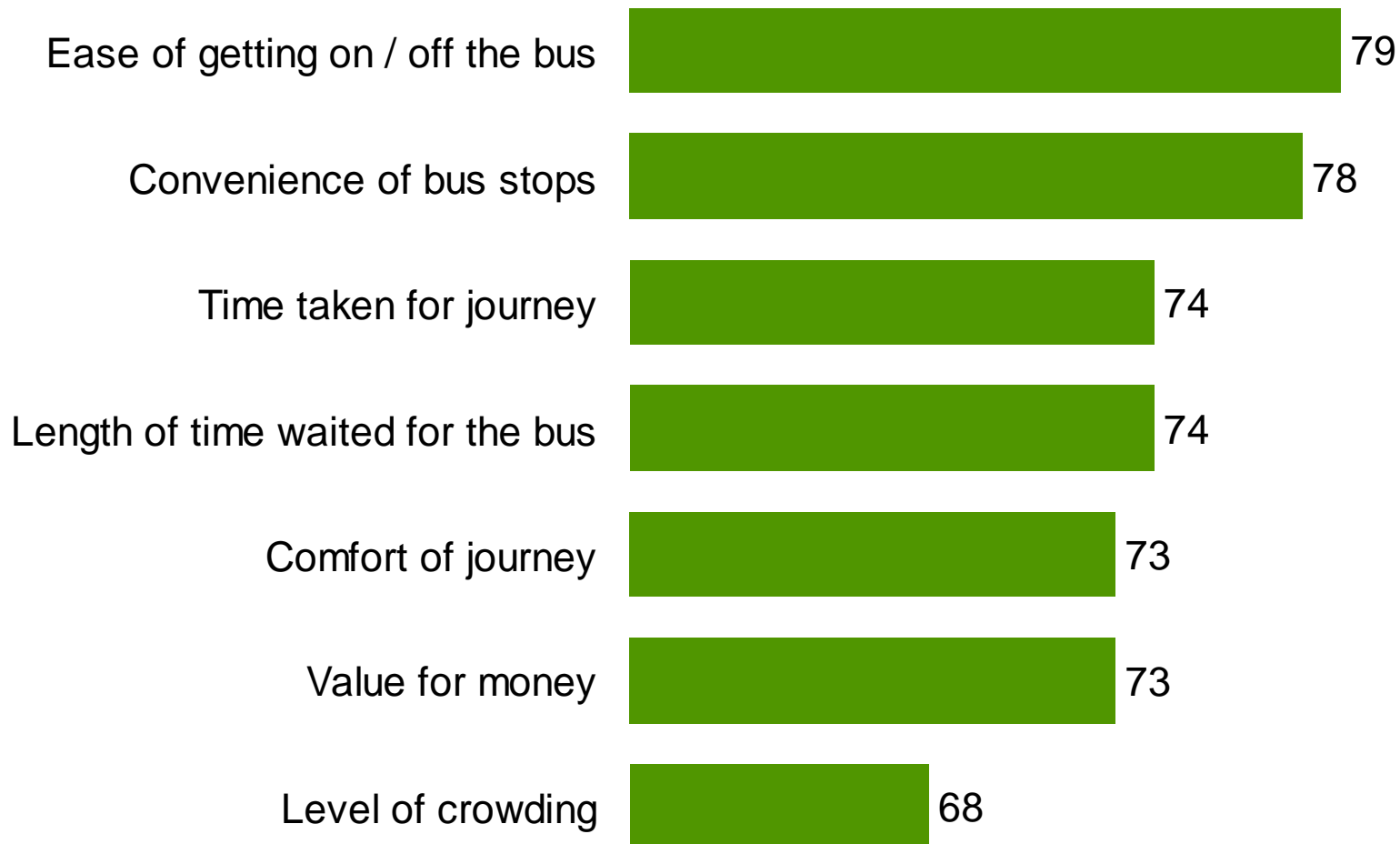


% of monthly spend in town centres

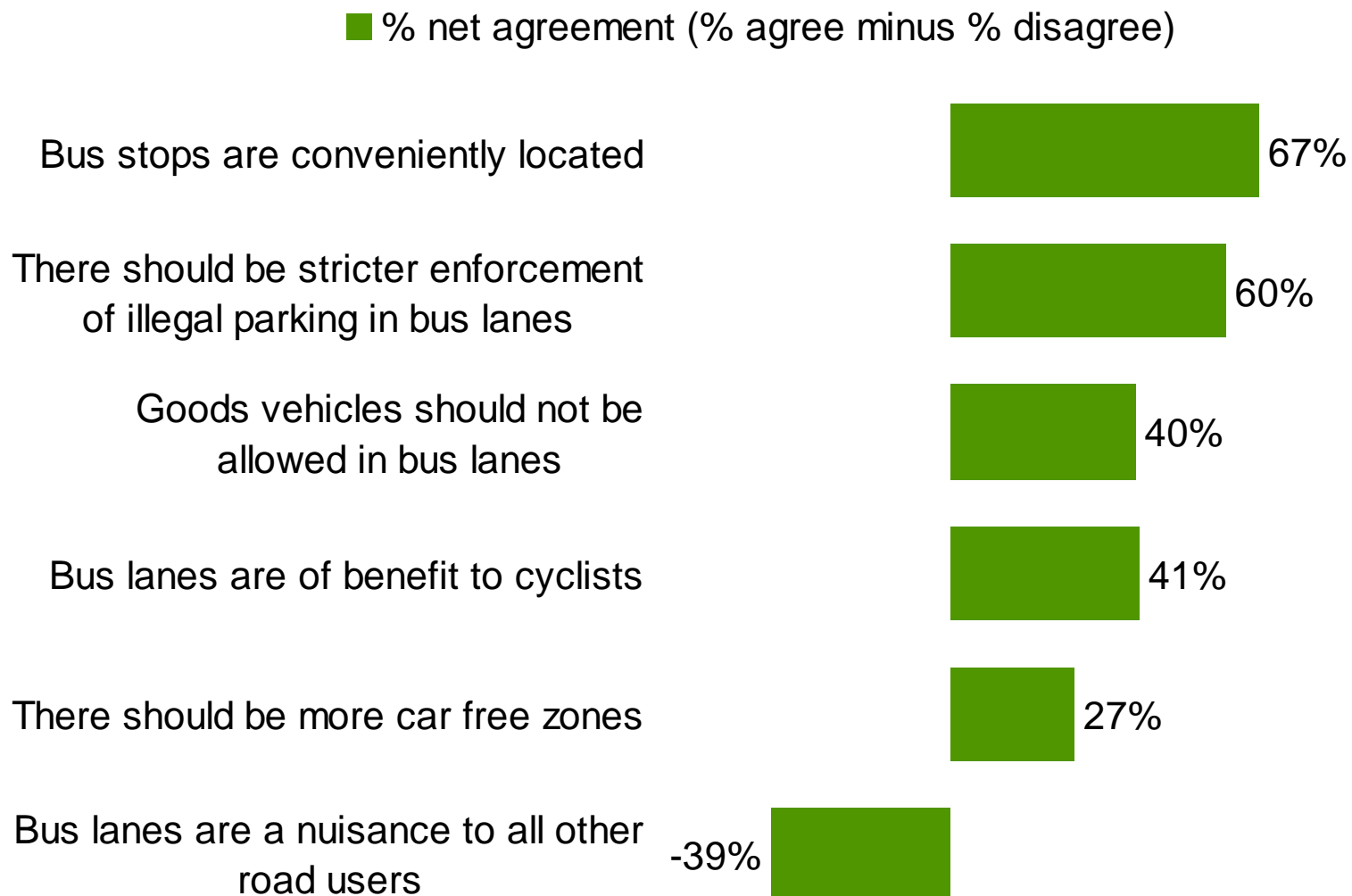
Bus services and bus priority measures are viewed positively...

Current bus users are satisfied

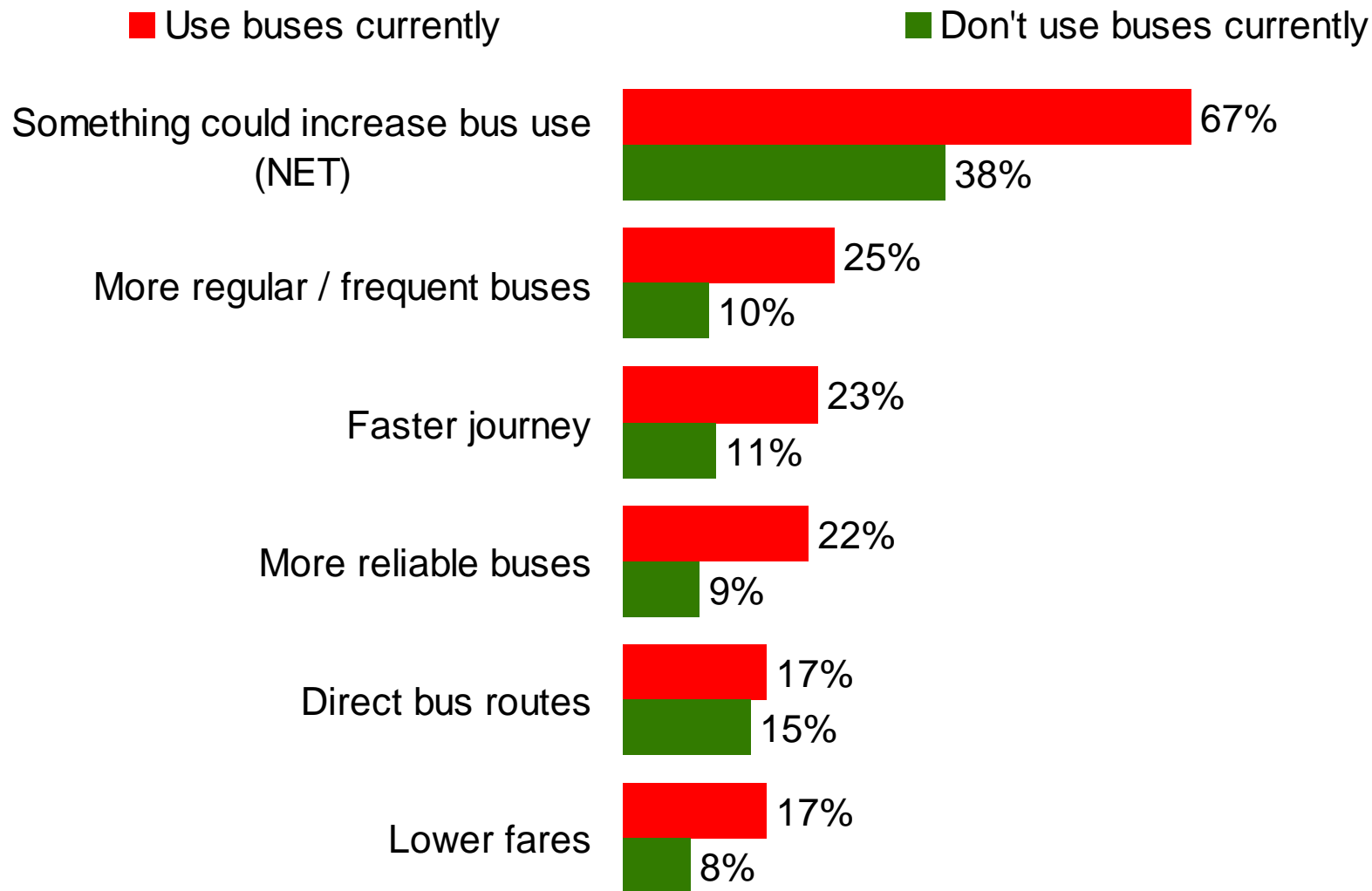
■ Average satisfaction score (0 = extremely dissatisfied to 100 = extremely satisfied)



There is majority support for bus priority measures

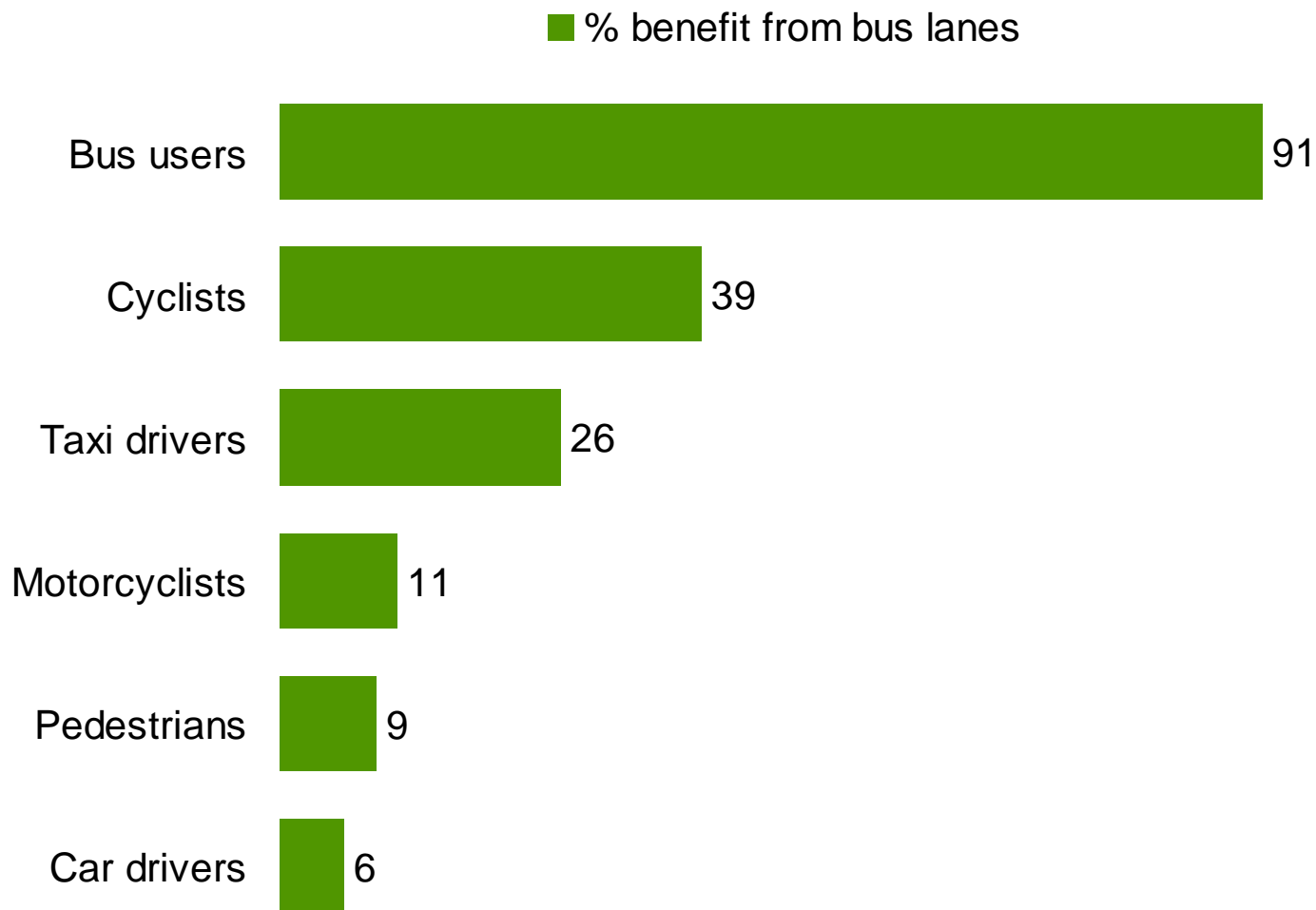


There is scope for increasing bus usage further

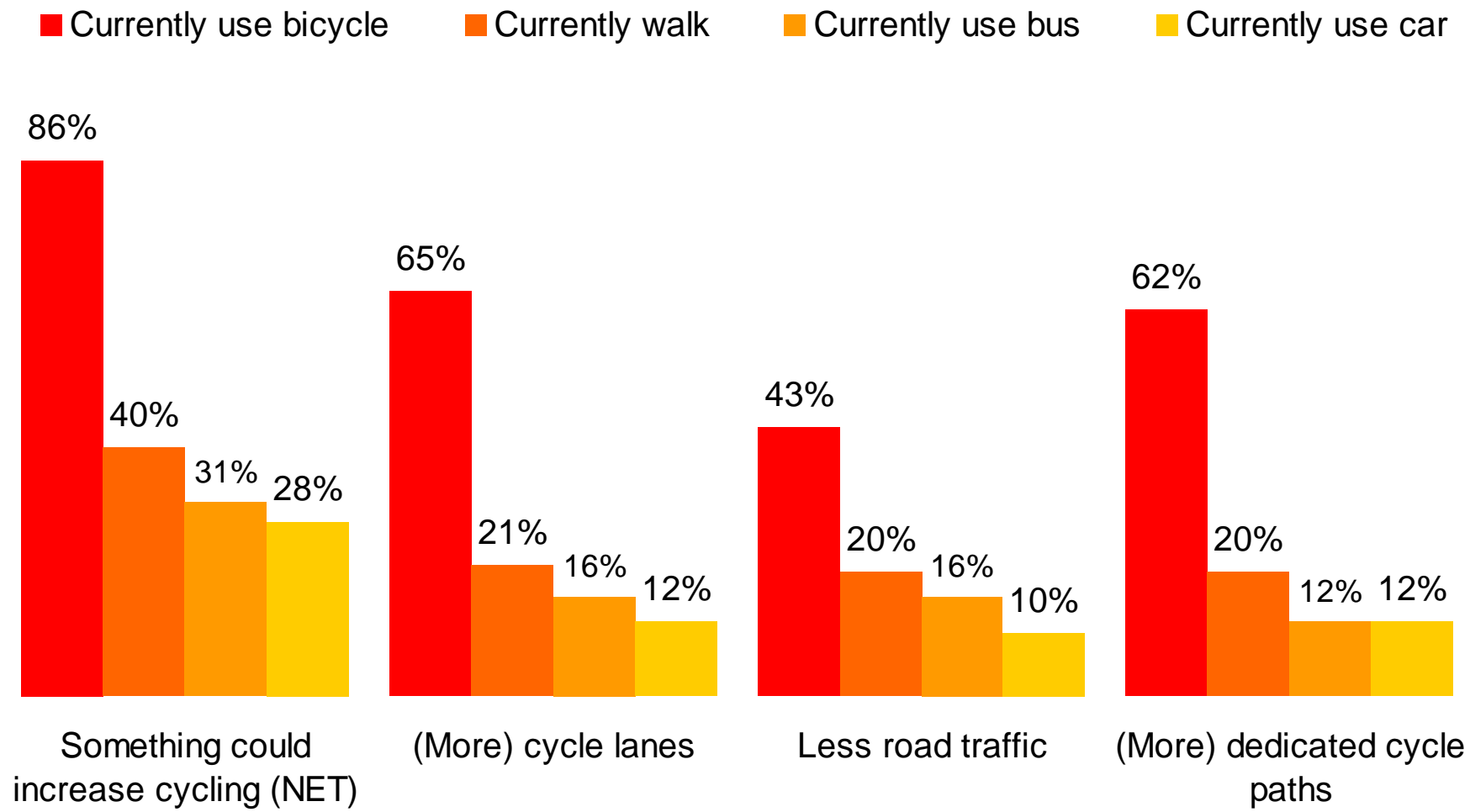


What else did we learn.....

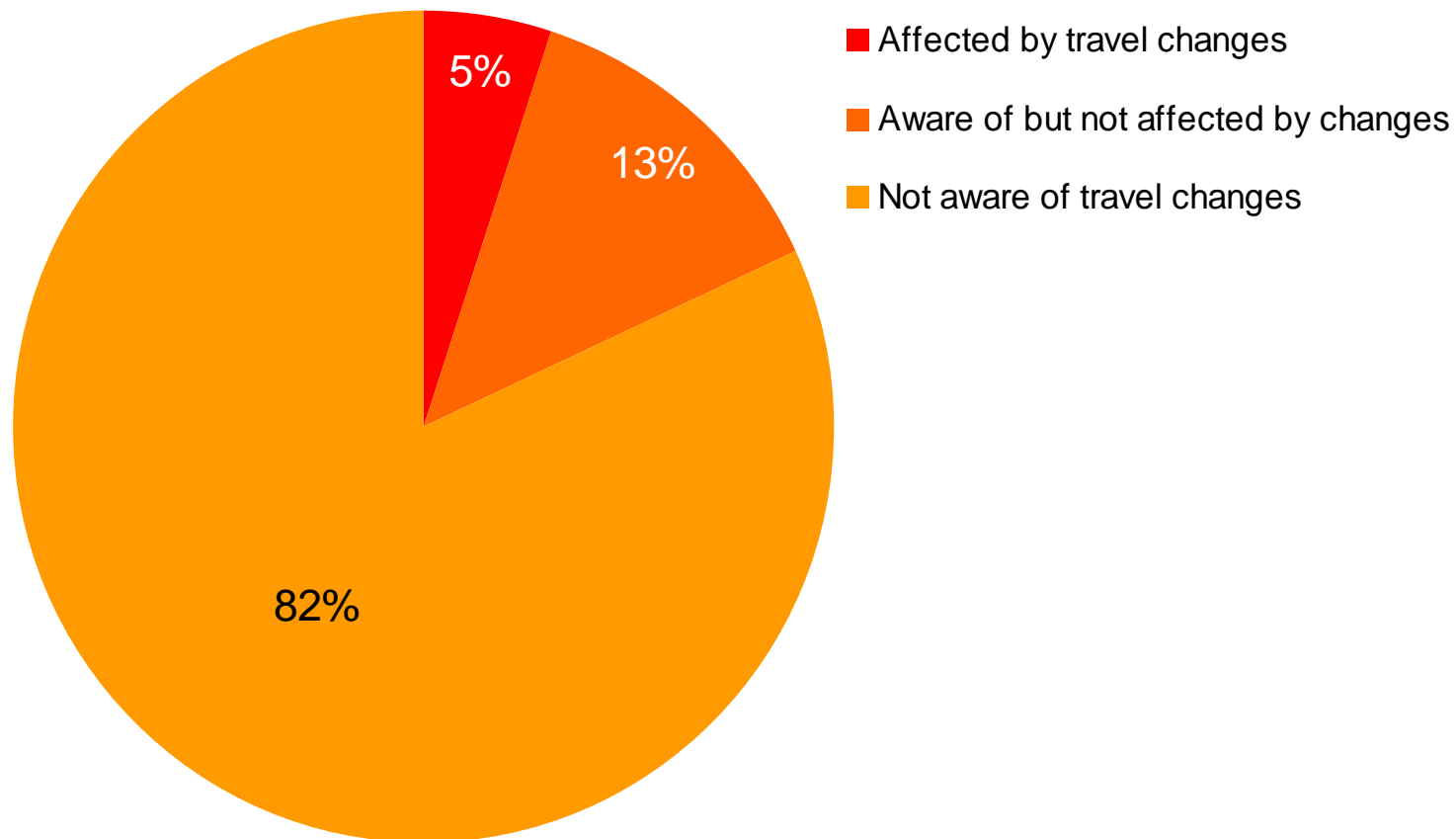
Benefits of bus lanes to cyclists and taxi drivers are not widely recognised



There is some scope to encourage cycling



- Visitors to Oxford Street



- Improvement to bus route frequency and speeds could encourage further bus use
- Bus was the most used mode for getting to the town centres
- Buses were used by nearly four in ten town centre visitors

- Shopping was the most mentioned reason for visiting town centres
- A third of visitors said that they were planning to spend an hour at the town centre
- Across an average month, average spend per town centre visitor was just over £100

- Making buses more regular, reliable, faster and direct were most mentioned as improvements that would encourage bus use.

- Bus users were more likely to be younger (ages 14- 24) and social grades C1C2

- Share the findings with stakeholders
- Inform and influence bus priority strategy moving forward



Thank you

Any questions?