TfL Bus User Survey 2014

Contents

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Introduction

Background

The Bus User Survey is a research study commissioned by Transport for London to establish and understand the profile of London bus passengers. The survey also provides details of passenger travel behaviour, including the purpose of their journeys and modes of access and egress.

The key aim of the study was to provide market information on bus passengers' journeys in terms of demographics such as age, gender, ethnicity, employment status, purpose of journey and ticket used. The study was a repeat of previous surveys conducted in 1999, 2003 and 2008.

Research Objectives

The main research objectives of the 2014 survey, as stated in the project brief, were to:

1. Determine the profile of bus passengers who board buses at bus stops within the area bounded by the M25;

2. Identify access and egress modes (i.e. method of transport used before and after the bus element of their trip);

3. Identify the use of bus services and the frequency of use;

4. Determine differences in the profile of bus users by time of day (including nights) and day of week (including weekends).

Fieldwork: Key Facts and Figures

Fieldwork took place between 12 May and 27 July 2014.

The key facts of the fieldwork:

- 450 day shifts and 150 night shifts were sampled and allocated to fieldworkers.

- Day shifts lasted for three hours and night shifts lasted for five hours.

- Questionnaires were distributed by fieldworkers to all boarding passengers, and collected as they alighted the bus.

- A total of 89,794 bus passengers were approached and 68,470 questionnaires were accepted, resulting in an overall refusal rate of 23.7%.

- Of the 68,470 distributed, 64,829 were returned, yielding a return rate of 94.7%.

- The overall completion rate was 80.9% – 81.8% amongst day bus passengers and 77.4% amongst night bus passengers.

Analysis: Key Facts and Figures

The key facts of the analysis:

- To ensure the data was of the highest quality, a number of logic rules were applied, which left 52,468 usable records (rules outlined in Analytical Report).

- Of the remaining 52,468 records, a total of 4,314 were under the age of 16, leaving 48,154 eligible questionnaires to be analysed after Q1 (age).

- Once all data cleaning and editing had taken place, the dataset was reweighted to compensate for any differences between the target sample and the achieved sample of the project. The unweighted bases are provided throughout this report.

Please note:

- Responses from under 16s have been removed throughout the report unless otherwise specified. Tables which include respondents aged under 16 can be found in the Appendix.

- Figures throughout the report may not add up to 100% due to rounding.

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Passenger Characteristics

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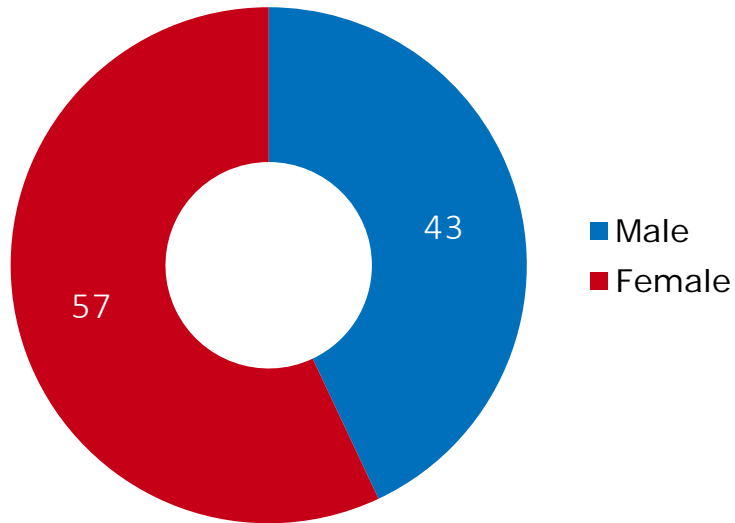# Passenger Characteristics: Gender

Women are more likely (57%) to be day bus passengers than men (43%). Meanwhile, almost two-thirds of night bus passengers are men (64%) - compared to just one third of night bus passengers who are women (36%).

Gender – Day Bus Passengers
%

Gender – Night Bus Passengers
%

43 Male
57 Female

36
64 Male
Female

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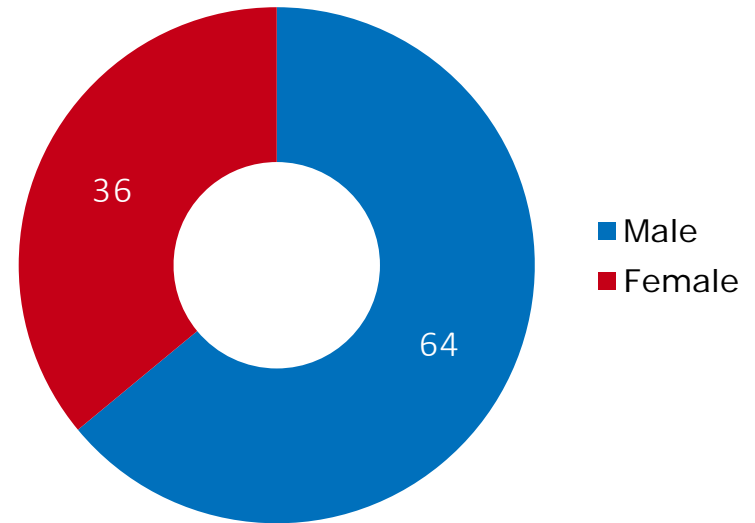
Passenger Characteristics: Gender Comparison with Londoners

Female day bus passengers make up 57% of the passengers surveyed compared with a London percentage of 51%. In contrast, night passengers are far more likely to be male (64%) than the general London population (49%).

Gender – Comparison between Day and Night Bus Passengers and Londoners
%

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Passenger Characteristics: Age

With regards to day bus users, the largest segment is 25-34 year olds (26%), followed by 35-44 year olds (19%). The largest segment of night bus users is 25-34 year olds (38%) followed by 20-24 year olds (24%).

Age – Day and Night Bus Passengers
%

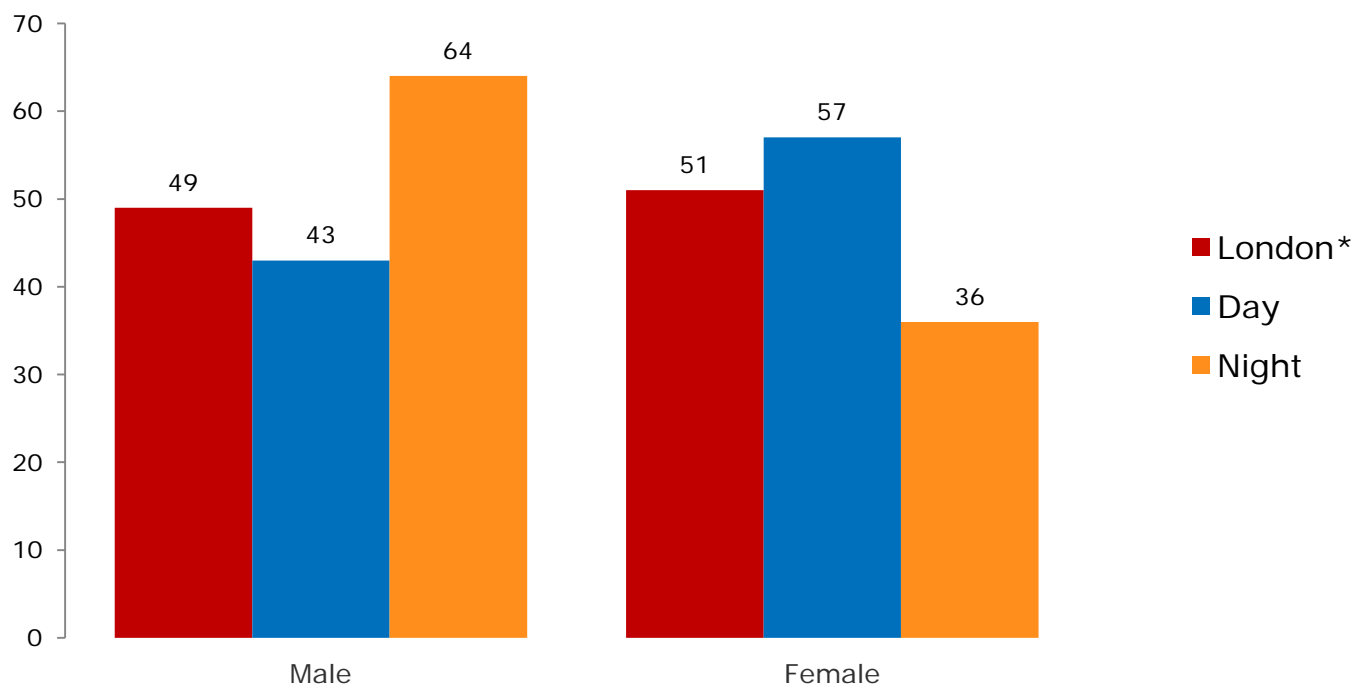| Age group	Day	Night
16-17	5	3
18-19	4	7
20-24	12	24
25-34	26	38
35-44	19	15
45-54	14	8
55-59	5	2
60-64	4	1
65-69	4	1
70-79	4	
80+	2	
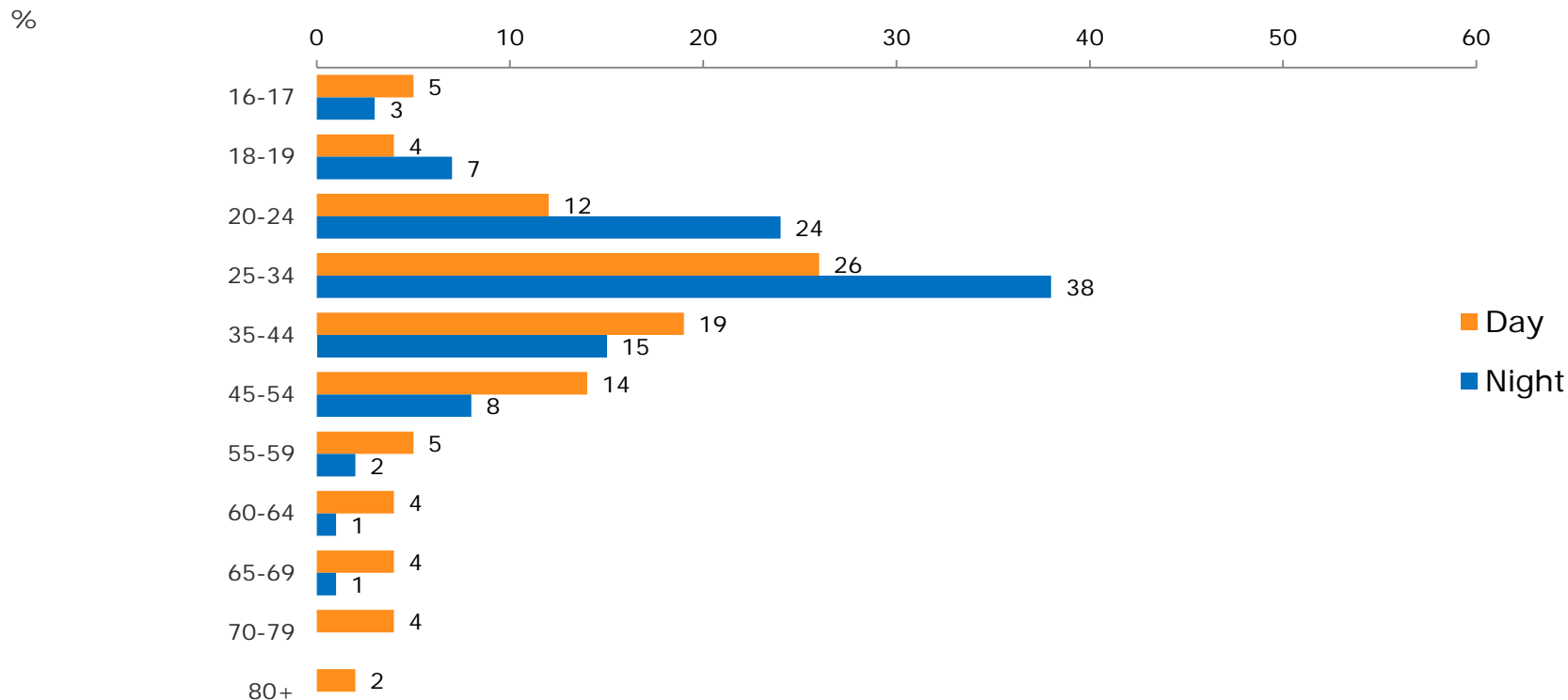
Q1. Which age group are you in?
Unweighted base: 38,825 Day; 9,329 Night
Note: Figures under 0.5% are not shown

Passenger Characteristics: Age Comparison with Londoners

Broadly speaking, the profile of bus passengers is more closely matched to the London population on day buses compared to night buses. However, bus passengers are more likely to be aged 18-34 than the London population, particularly on night buses.

Age – Comparison between Day and Night Bus Passengers and Londoners
%

Legend: London, Day, Night

Age	London	Day	Night
16-17	3	5	3
18-19	3	4	7
20-24	10	12	24
25-34	25	26	38
35-44	19	19	15
45-54	16	14	8
55-59	6	5	2
60-64	5	4	1
65-69	4	4	1
70-79	6	4	
80+	4	2	

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Passenger Characteristics: Gender by Age Group

Among day bus passengers, the proportion of male to female passengers is fairly consistent across the age range. On night bus services, the gender gap is greater among passengers aged 25 to 64 than among other age groups.

Gender by Age Group – Day Bus Passengers

%

Age	Male	Female
Average	43	57
16-17	42	58
18-19	43	57
20-24	41	59
25-34	43	57
35-44	44	56
45-54	43	57
55-59	42	58
60-64	43	57
65-69	43	57
70-79	41	59
80+	42	58
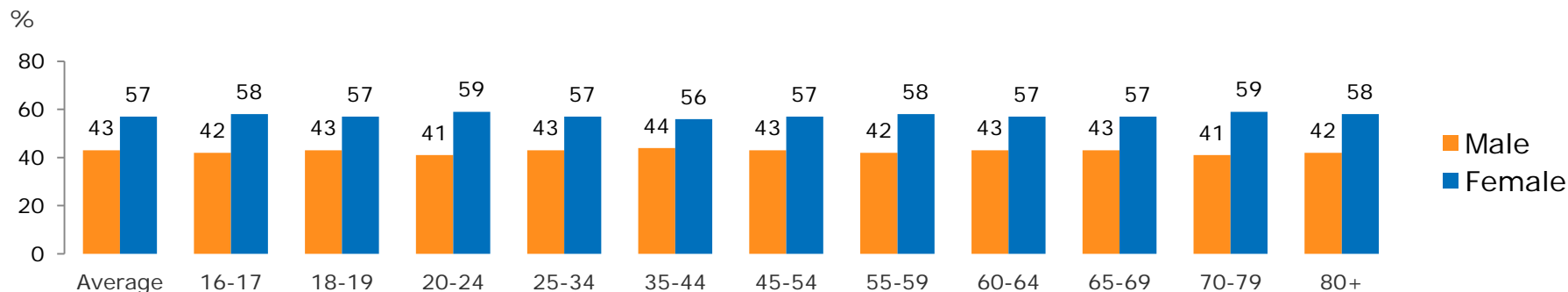
Gender by Age Group – Night Bus Passengers

%

Age	Male	Female
Average	64	36
16-17	54	46
18-19	55	45
20-24	57	43
25-34	65	35
35-44	73	27
45-54	73	27
55-59	68	32
60-64	69	31
65+ *	64	36

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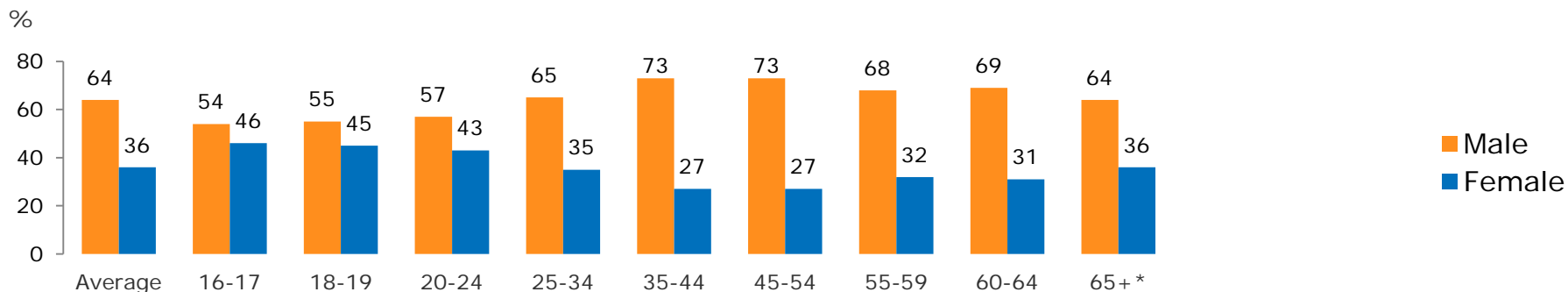
Passenger Characteristics: Employment Status

Over half of day and night bus passengers work full-time (51% and 59% respectively). While night bus passengers (59%) are more likely to work full-time than day bus passengers (51%), day bus passengers are more likely (9%) to be retired than night bus passengers (1%).

Employment Status – Day and Night Bus Passengers
%

	Day	Night
Working full time	51	59
Working part time	16	15
A full time student	11	12
Retired	9	1
Not working - looking for work	4	4
Looking after family/home	3	1
A part time student	2	3
Not working – not looking for work	2	2
Other	3	3

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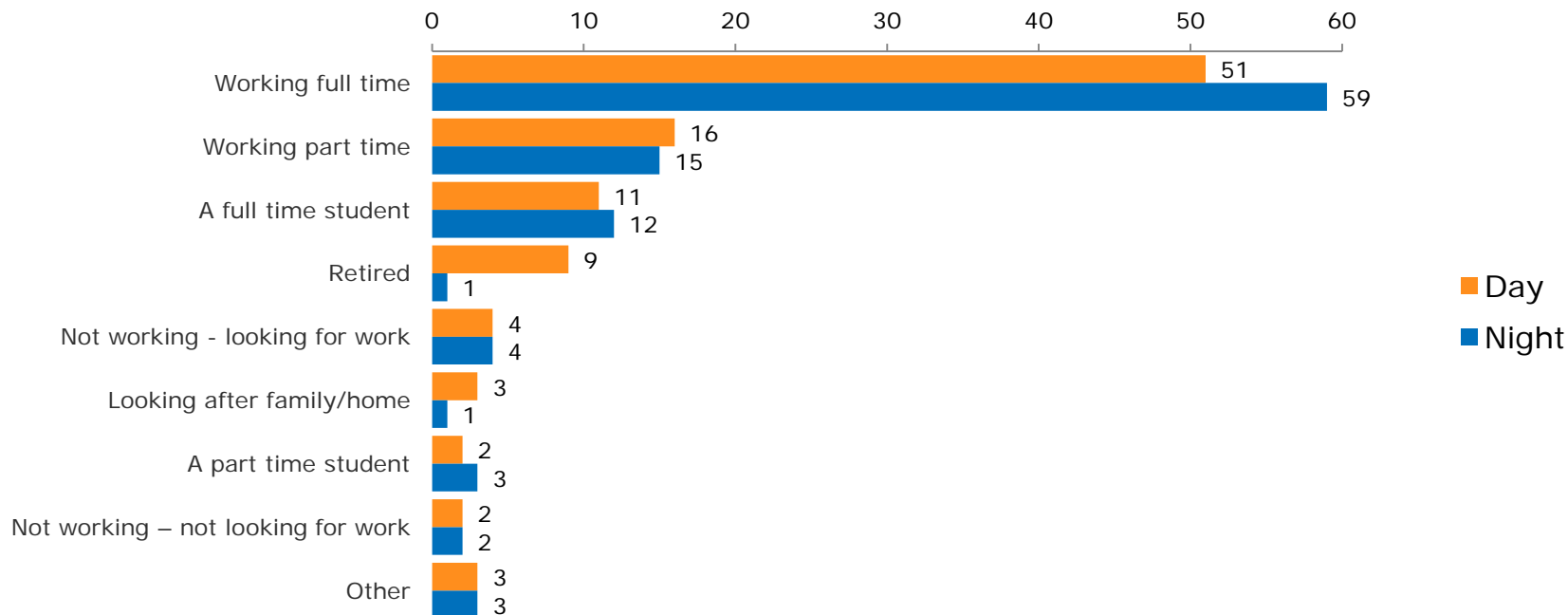
Passenger Characteristics: Employment Status Comparison with Londoners

Compared to the London population in general, people in full time work and students are over-represented on bus services, particularly night buses. In contrast, people who are retired and looking after home or family are under-represented, especially on night buses.

Employment Status – Comparison between Day and Night Bus Passengers and Londoners
%
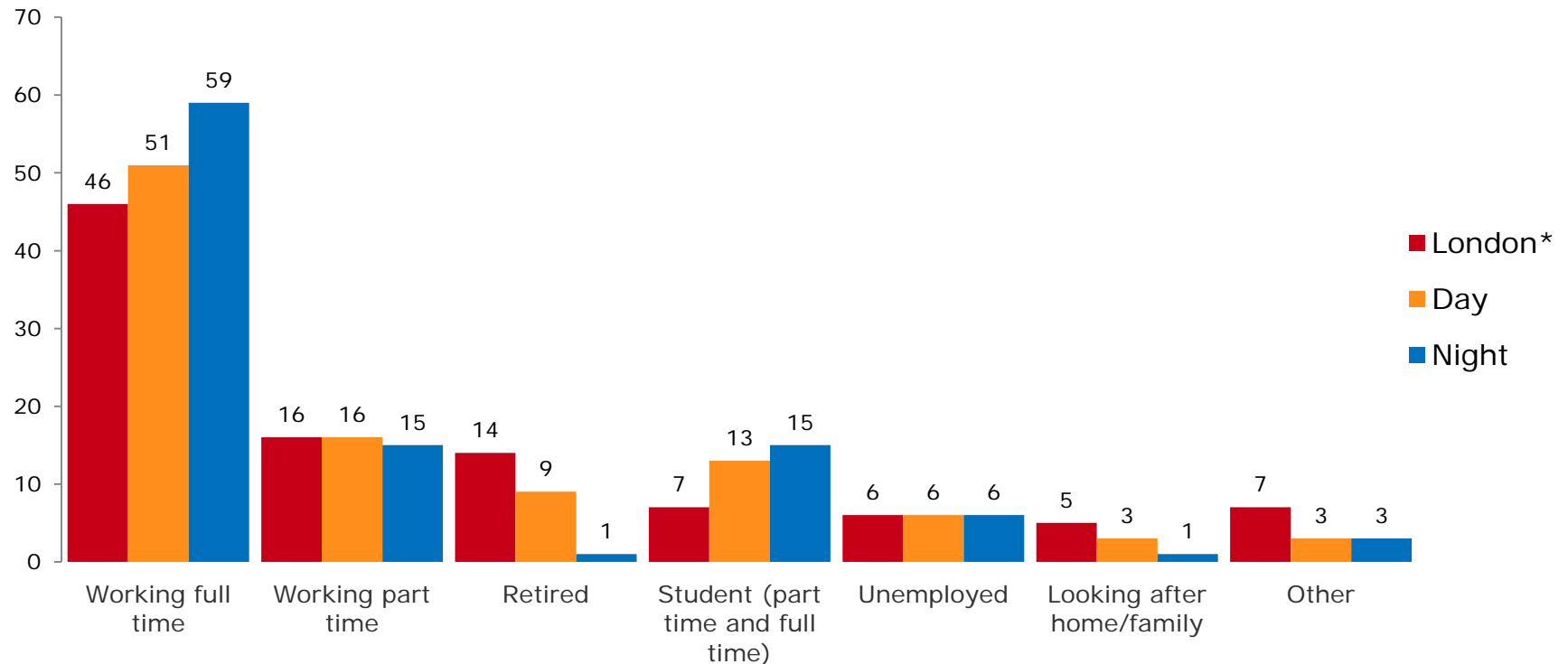
Legend: London* (red), Day (orange), Night (blue)

Category	London*	Day	Night
Working full time	46	51	59
Working part time	16	16	15
Retired	14	9	1
Student (part time and full time)	7	13	15
Unemployed	6	6	6
Looking after home/family	5	3	1
Other	7	3	3

Passenger Characteristics: Occupation of Household Chief Income Earner

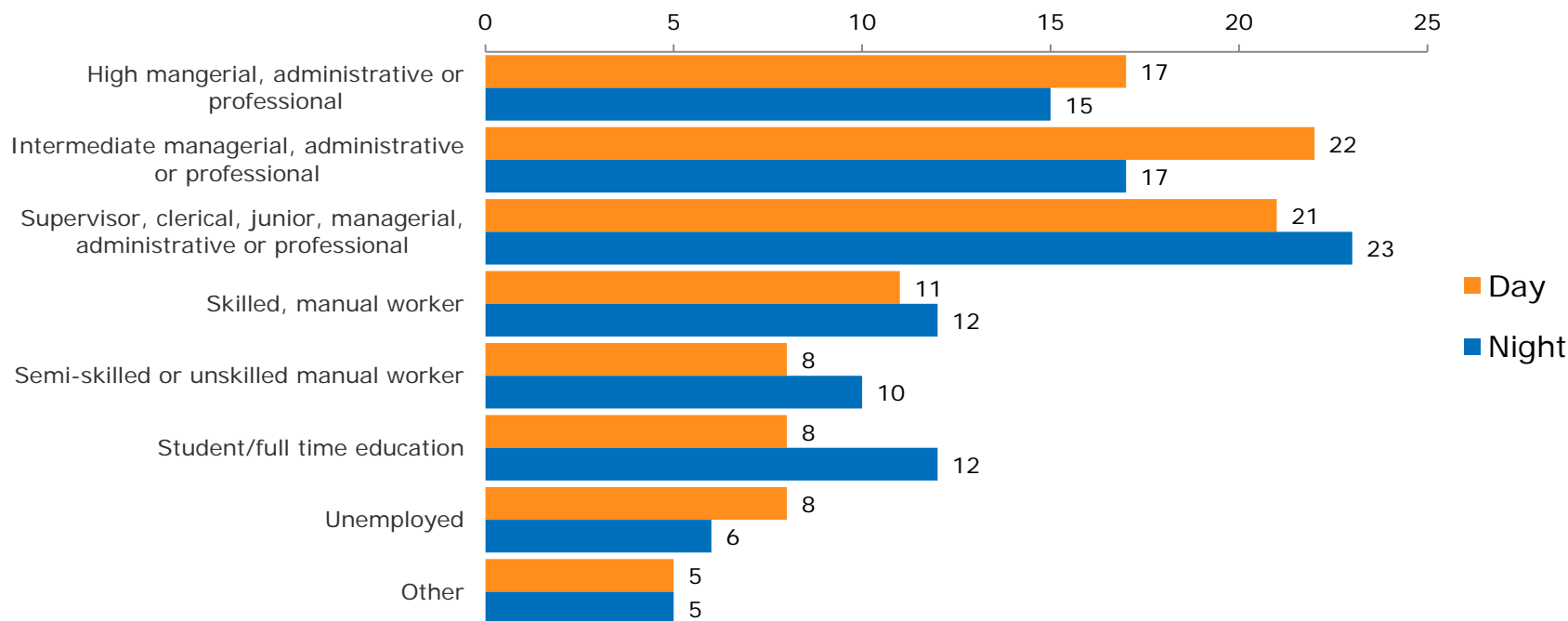Day bus passengers are more likely (39%) than night bus passengers (32%) to come from households where the chief income earner is high or intermediate managerial.

Occupation of Household Chief Income Earner – Day and Night Passengers
%

Occupation	Day	Night
High mangerial, administrative or professional	17	15
Intermediate managerial, administrative or professional	22	17
Supervisor, clerical, junior, managerial, administrative or professional	21	23
Skilled, manual worker	11	12
Semi-skilled or unskilled manual worker	8	10
Student/full time education	8	12
Unemployed	8	6
Other	5	5

Q16. Which of the following best describes the occupation of the chief income earner in your household?
If retired, please cross occupation before retirement.
Unweighted base: 27,925 Day; 6,875 Night
Note: Figures under 0.5% are not shown (Househusband/Housewife was removed)

Passenger Characteristics: Annual Household Income

Passengers on night bus services are more likely to have an annual household income of less than £20,000 (57%) than on day bus services (50%). Meanwhile, day bus passengers are more likely to have an annual income of over £30,000 (33%) in comparison to night bus passengers (26%).

Annual Household Income – Day and Night Bus Passengers
%
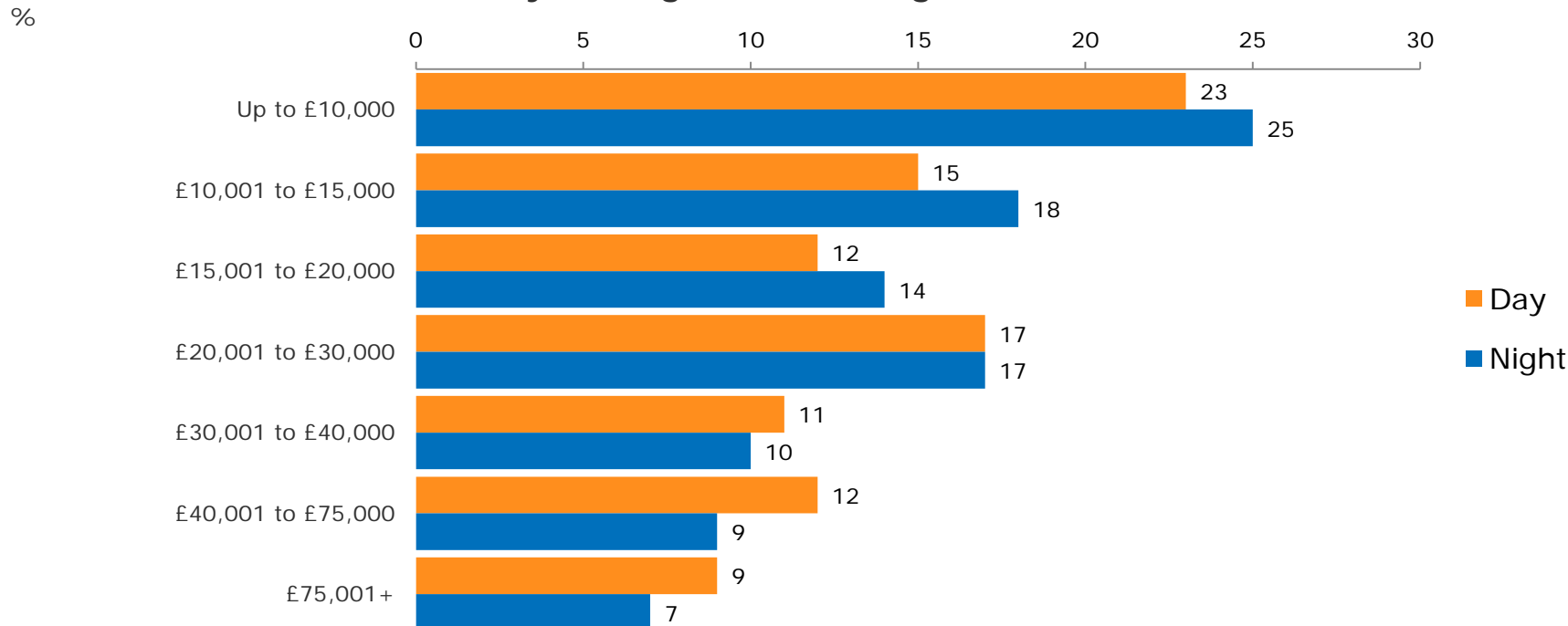
Legend: ■ Day ■ Night

Income band	Day	Night
Up to £10,000	23	25
£10,001 to £15,000	15	18
£15,001 to £20,000	12	14
£20,001 to £30,000	17	17
£30,001 to £40,000	11	10
£40,001 to £75,000	12	9
£75,001+	9	7

Passenger Characteristics: Residence

The vast majority of both day (86%) and night (87%) bus passengers live within the M25. Day bus passengers are slightly more likely (9%) to live outside the M25 but within the South East than night bus passengers (6%).
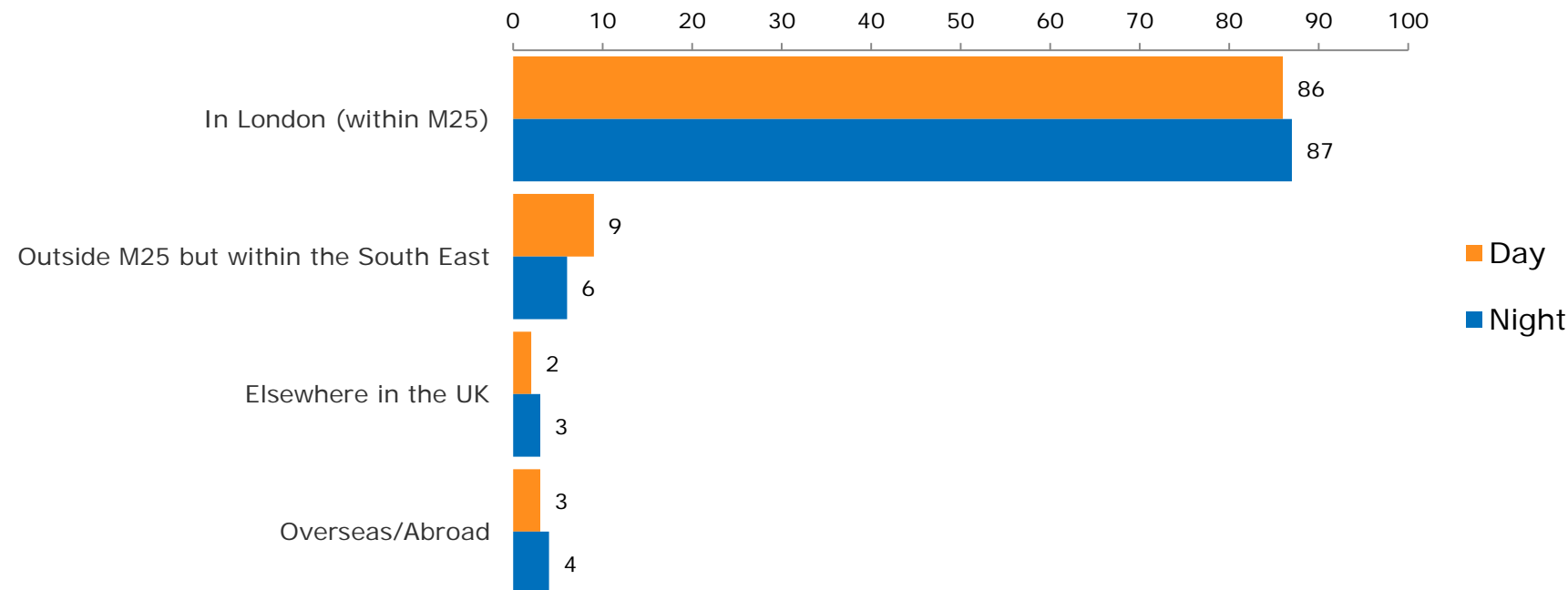
Residence – Day and Night Bus Passengers
%

Q10. Where do you live?
Unweighted base: 29,886 Day; 7,270 Night

Passenger Characteristics: Ethnicity

The majority of bus passengers are white, but day bus passengers are more likely (32%) to be White British / Irish than night bus passengers (21%), while night bus passengers are more likely (34%) to be White Other compared to day bus passengers (21%).

Ethnicity – Day and Night Bus Passengers
%

Ethnicity	Day	Night
White British/Irish	32	21
White other	21	34
Black/Black British - Caribbean	7	5
Black/Black British - African	12	11
Black/Black British - other	1	1
Asian/Asian British - Indian	6	4
Asian/Asian British - Pakistani	2	2
Asian/Asian British - Bangladeshi	2	2
Asian/Asian British - Other	4	4
Mixed - White and Black Caribbean	1	2
Mixed - White and Black African	1	2
Mixed - White and Asian	1	1
Chinese	2	2
Other	7	10

Passenger Characteristics: Ethnicity (Grouped)

White is the major ethnic group among bus passengers. When comparing day and night bus services, day buses have a slightly higher proportion of Black (20%) passengers than night buses (17%), while passengers on night buses are more likely (12%) to be of other ethnic group than on day buses (9%).

Ethnicity (Grouped) – Day and Night Bus Passengers
%

Q15. Which of these do you consider to be your ethnic group?
Unweighted base: 32,944 Day; 7,759 Night

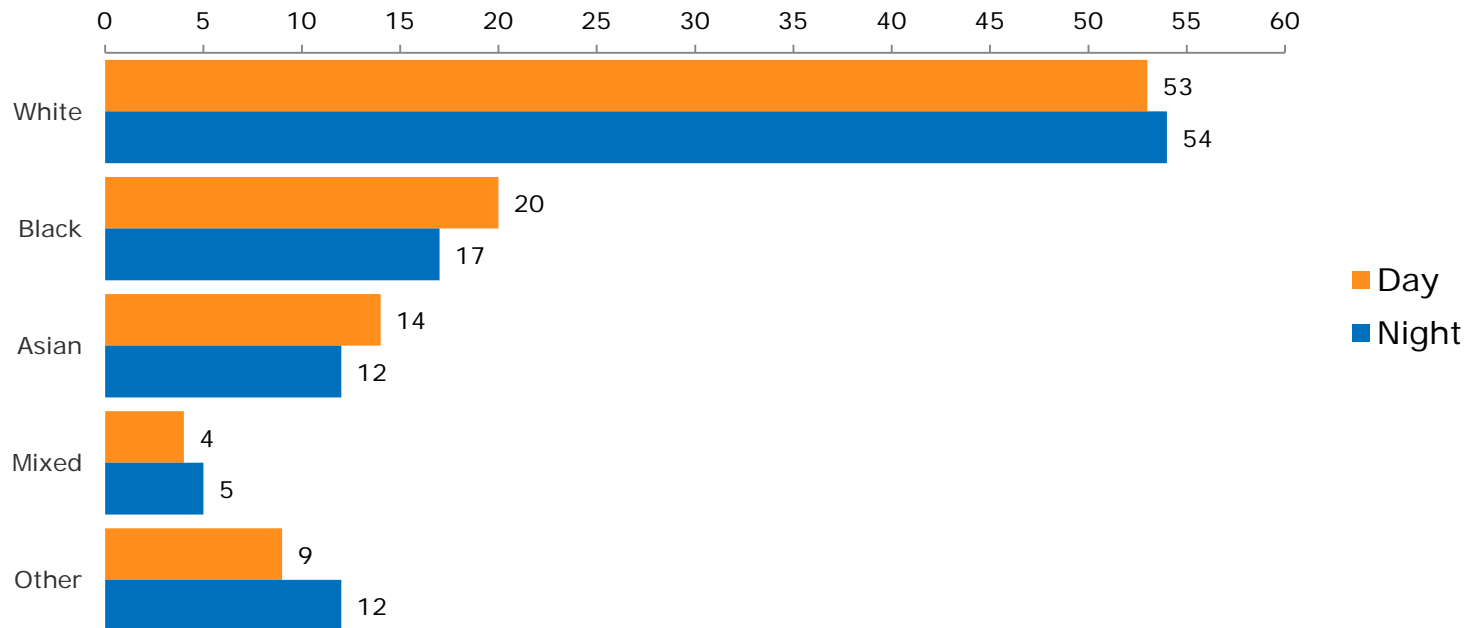Transport for London

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Passenger Characteristics: Ethnicity (Grouped) Comparison With Londoners

Although the largest segment, the proportion of bus passengers who are White is around 10 percentage points lower than among the London population in general. Asian bus passengers are also slightly under-represented. Conversely the proportion of Black or other ethnic group passengers is higher than that of Londoners in general.

Ethnicity (Grouped) – Comparison between Day and Night Bus Passengers and Londoners
%
%

Legend: London* (red), Day (orange), Night (blue)

	White	Black	Asian	Mixed	Other
London*	63	12	18	4	3
Day	53	20	14	4	9
Night	54	17	12	5	12

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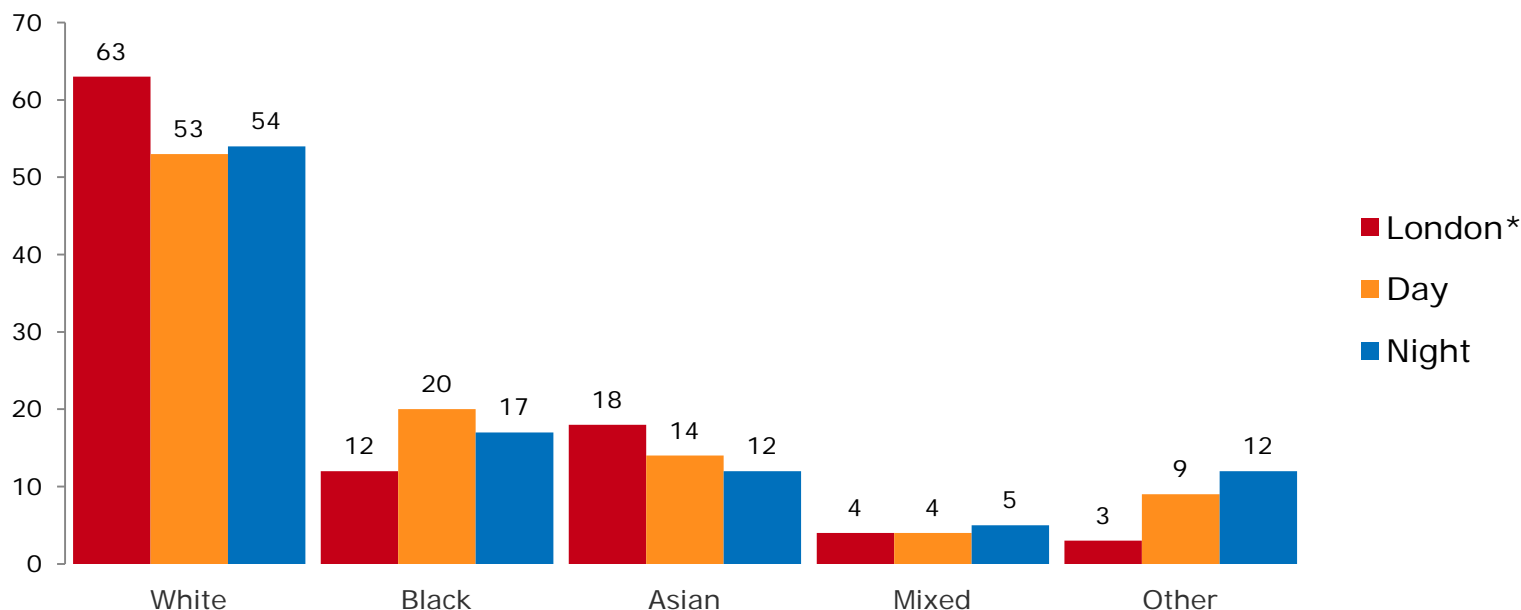
Passenger Characteristics: Disabilities

The vast majority of day and night bus passengers are not disabled (90% and 92% respectively). Mobility impairments (2%) and age related mobility difficulties (2%) were among the most mentioned disabilities by day bus passengers.

Disabilities – Day and Night Bus Passengers
%
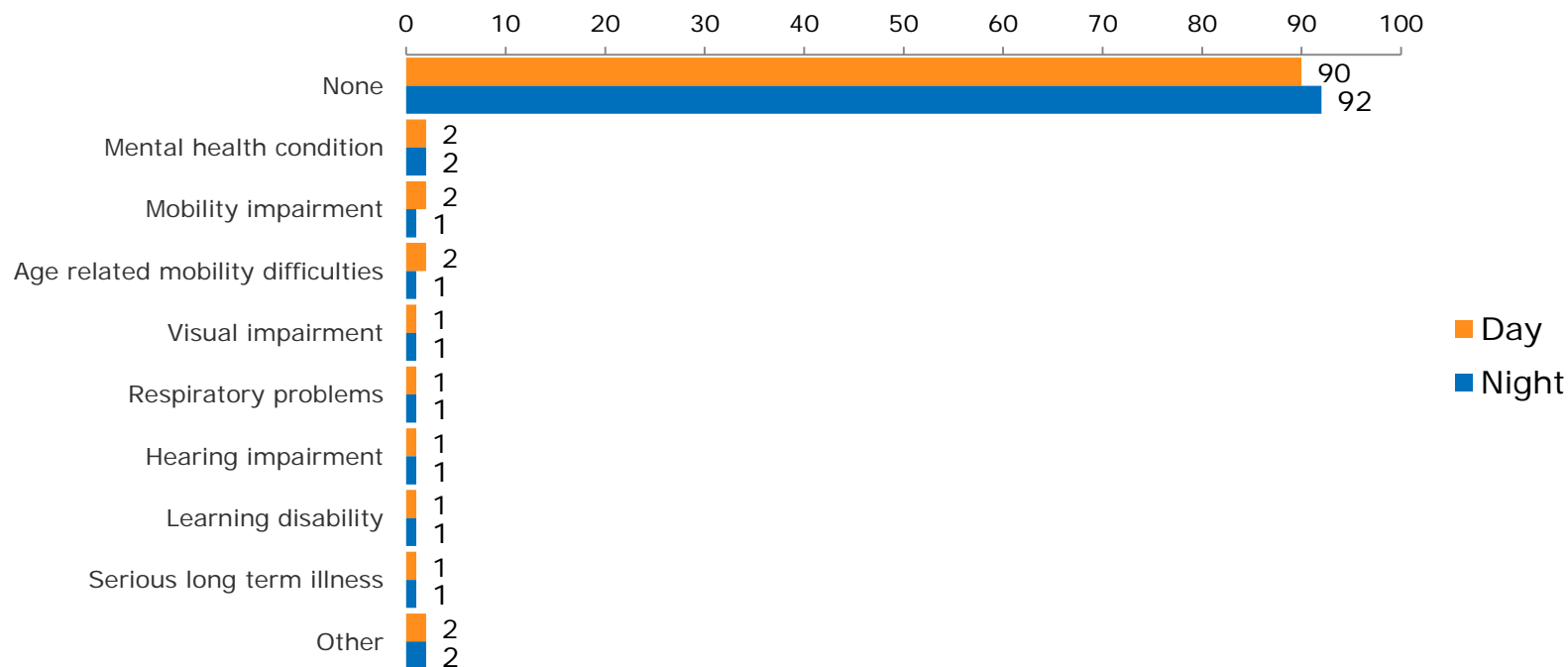
Passenger Characteristics: Disabilities Comparison with Londoners

Around 17% of Londoners say their day-to-day activities are limited in some way (8% a lot, 9% a little). In comparison, 10% of day bus passengers and 8% of night bus passengers have a disability that limits their daily activities*.

Disabilities – Londoners
%

Disabilities – Day and Night Bus Passengers
%

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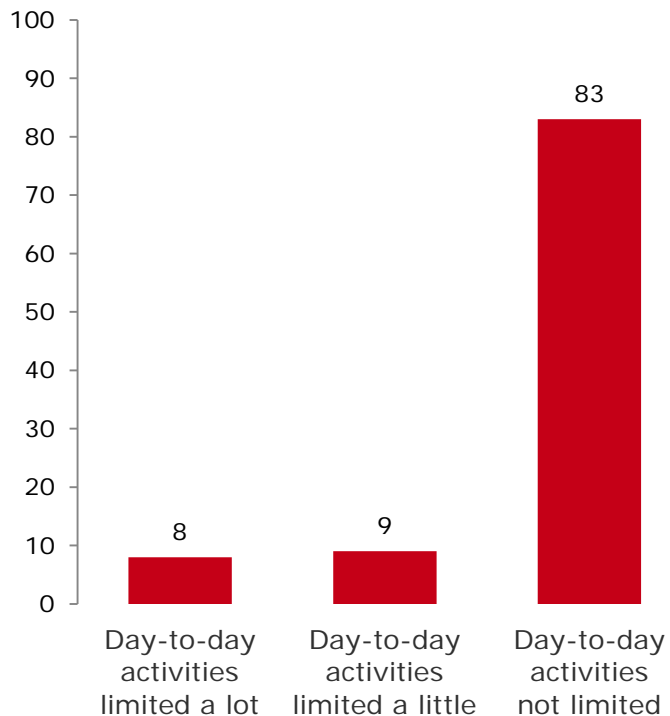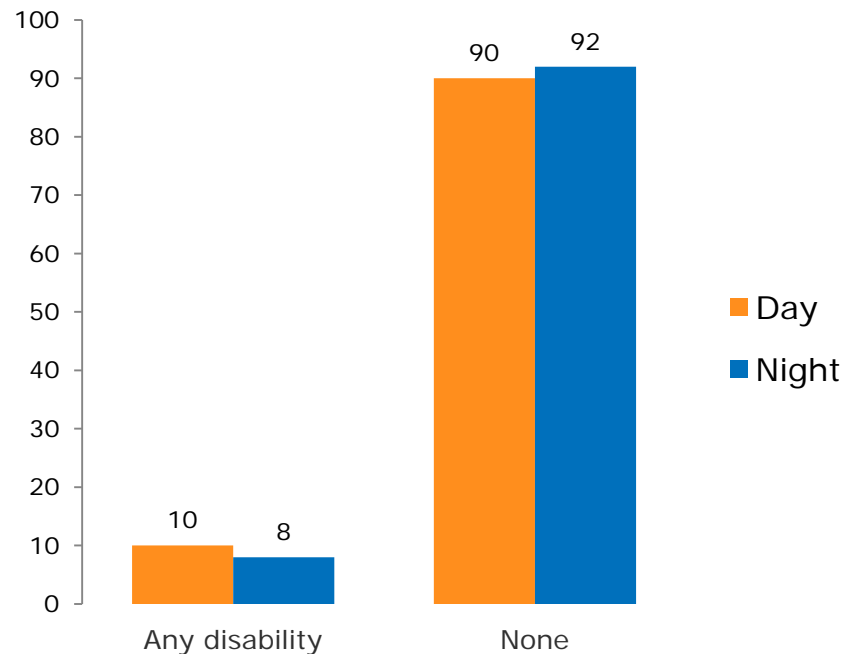
Passenger Characteristics: Wheelchair Users

On both day and night buses, 2% of bus passengers have used a wheelchair when travelling in London in the past 12 months.

Wheelchair Users – Day Bus Passengers
%

Wheelchair Users – Night Bus Passengers
%

2
98
■ Yes
■ No

2
98
■ Yes
■ No

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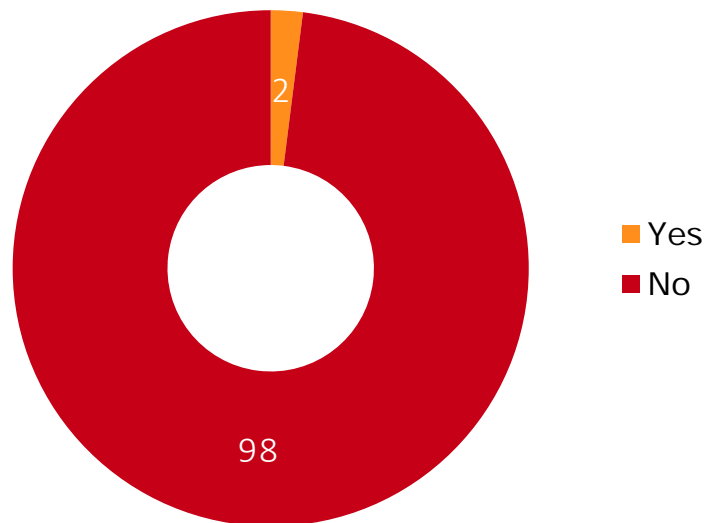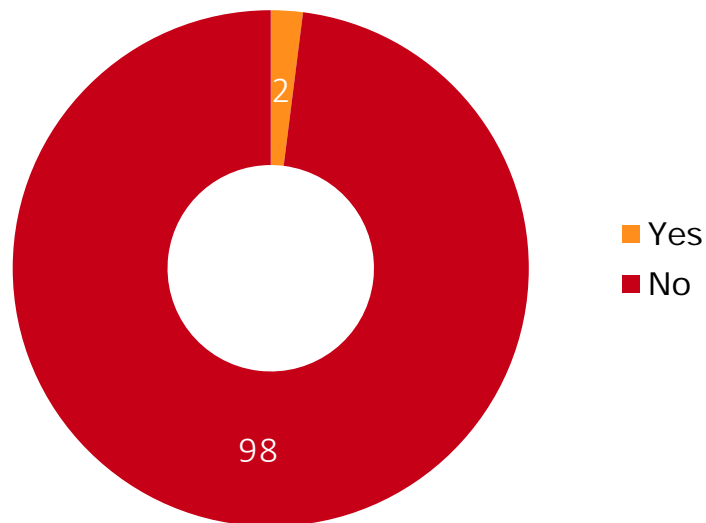
Passenger Characteristics: Wheelchair Usage on Journey

On day bus services 0.2% of passengers used a wheelchair on their journey, and 0.3% of passengers on night bus services.

Journey Wheelchair Users – Day Bus Passengers
%

Journey Wheelchair Users – Night Bus Passengers
%

0.2%

0.3%

Q13, Are you using a wheelchair on this journey?
Unweighted base: 33,323 Day; 7,831 Night

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Passenger Characteristics: Baby Buggie, Pushchair or Pram Usage on Journey

Around 4% of passengers travelled with an unfolded or folded baby buggy, pushchair or pram during the day.

Travelling with a Baby Buggy / Pushchair / Pram on Journey – Day and Night Bus Passengers
%

Legend: ■ Day ■ Night

	Day	Night
Yes - unfolded	3	1
Yes - folded	1	1
No	96	98

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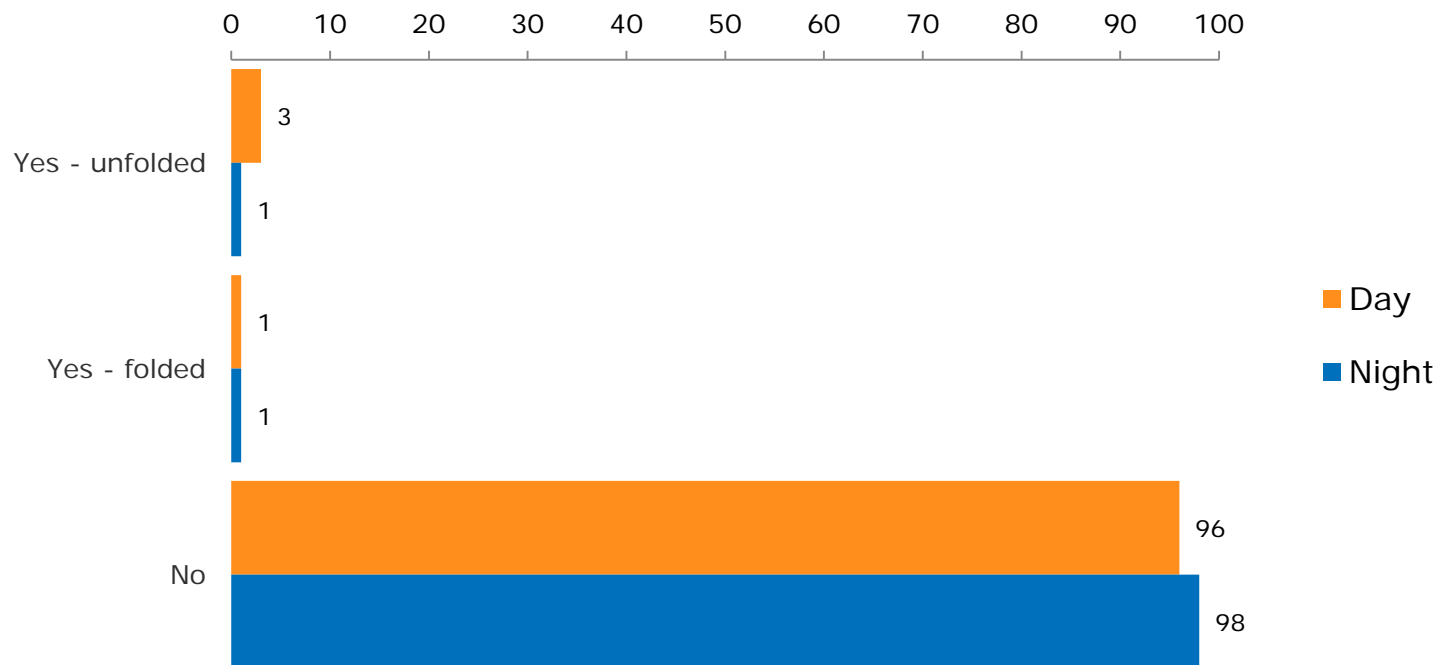
3

Journey Characteristics

Journey Characteristics: Main Purpose of Journey

Travelling to/from work was the most common reason for passenger journeys on both day and night bus services (52% & 51% respectively). The second most common reason was to/from shopping among day bus passengers (11%) and leisure among night bus passengers (18%).

Main Purpose of Journey – Day and Night Bus Passengers
%

Purpose	Day	Night
Travelling to/from work	52	51
To/from shopping	11	1
Visiting friends/relatives	9	13
To/from school/education	7	4
Leisure	8	18
Healthcare Appointment	3	
Employer Business	2	2
Personal Business	2	1
Holiday/Sightseeing	2	3
Taking/collecting child	1	
Picking up/dropping off someone	1	1
Other	3	6

■ Day
■ Night

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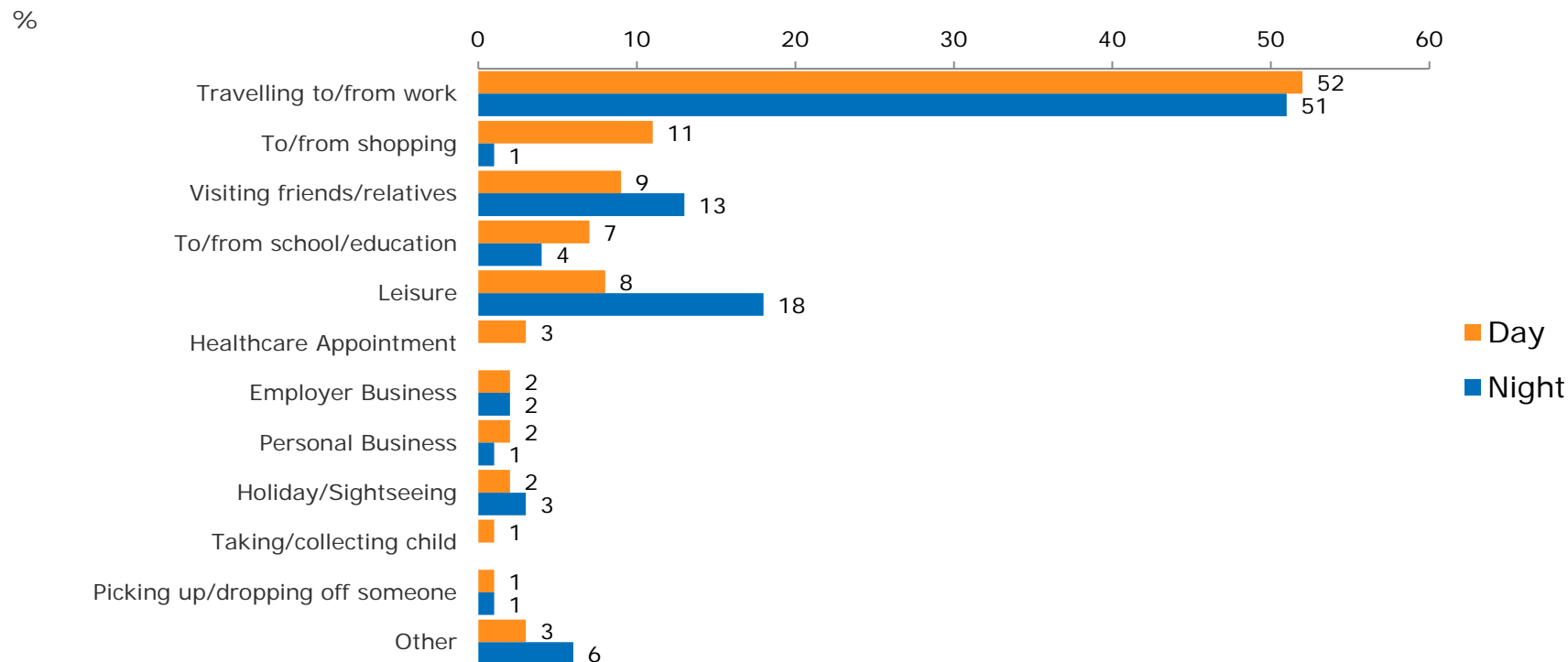
Journey Characteristics: Main Journey Purpose by Gender (Day Passengers only)

On day bus services, the most common journey purpose among bus passengers was travelling to/from work. However, female bus passengers were more likely (13%) to have taken the bus to/from shopping compared to male passengers (8%).

Main Journey Purpose by Gender – Day Bus Passengers

%

Purpose	Male	Female
Travelling to/from work	56	50
Employer Business	2	1
To/from school/education	7	8
To/from shopping	8	13
Visiting friends/relatives	9	9
Leisure	8	8
Personal Business	3	2
Healthcare Appointment	2	3
Taking/collecting child		1
Picking up/dropping off someone		1
Holiday/Sightseeing	2	2
Other	3	3
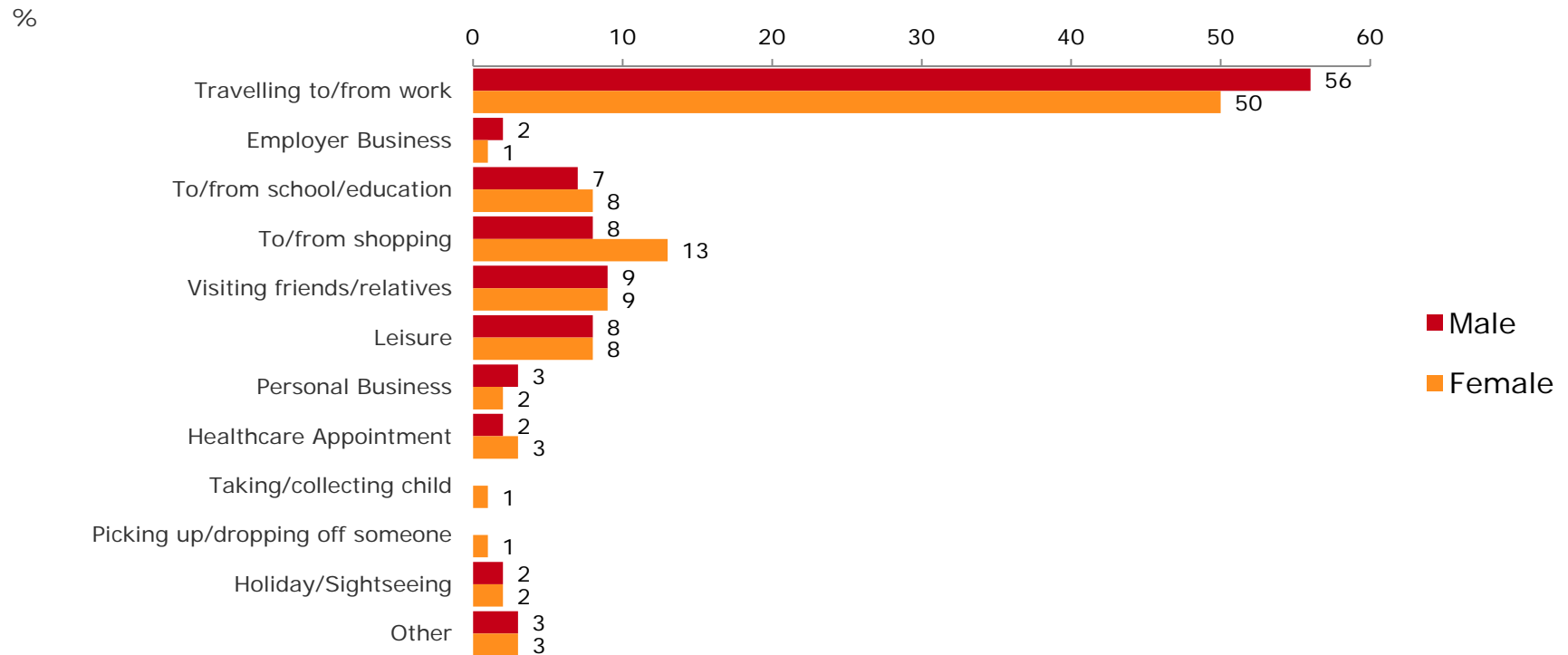
■Male
■Female

*On day bus services, 57% of passengers are female and 43% are male

Q2. What is the main purpose of your journey? Q3. Are you…?
Unweighted base: 34,524 Day
Note: Figures under 0.5% are not shown

Journey Characteristics: Main Journey Purpose by Gender (Night Passengers only)

On night bus services, the most common journey purpose among night bus passengers was travelling to / from work. However, female bus passengers were more likely (23%) to use a night bus for leisure compared to male passengers (16%).

Main Journey Purpose by Gender – Night Bus Passengers

%
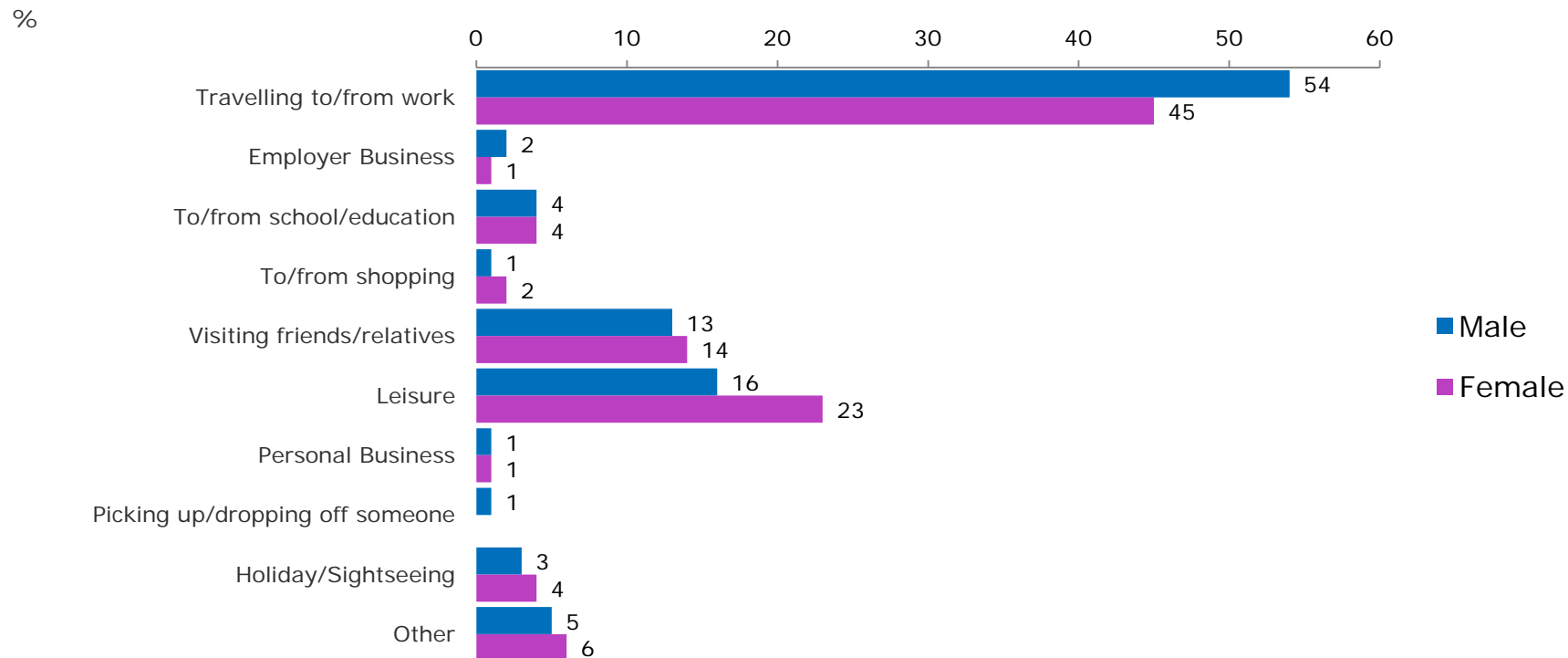
*On night bus services, 64% of passengers are male and 36% are female

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Journey Characteristics: Main Journey Purpose by Age (Grouped)

On day bus services, passengers aged 16-19 were the most likely (37%) to use a bus to/from school or education and passengers aged 60+ were the most likely (33%) to use a bus to/from shopping. On night bus services, the majority aged 20-34 and 35-59 used the bus to travel to/from work. In comparison to other age groups, 16-19 year olds were the most likely to use a night bus to visit friends/relatives (20%) and for leisure (19%).

Main Journey Purpose by Age (Grouped) – Day and Night Bus Passengers
%

	16-19		20-34		35-59		60+	
	Day	**Night**	**Day**	**Night**	**Day**	**Night**	**Day**	**Night**
Travelling to/from work	21	27	62	51	60	59	19	39
Employer Business	1	1	2	1	3	3	1	1
To/from school/education	37	12	6	4	3	1	1	1
To/from shopping	8	1	7	1	9	1	33	5
Visiting friends/relatives	13	20	8	13	8	11	12	19
Leisure	9	19	7	19	5	14	13	13
Personal Business	2	3	2	1	2	1	4	2
Healthcare Appointment	1	1	1	-	3	-	7	2
Taking/collecting child	1	1	1	-	1	-	1	1
Picking up/dropping off someone	1	1	1	-	1	-	1	1
Holiday/Sightseeing	2	4	2	3	2	2	3	6
Other	5	10	2	5	3	6	6	9
Unweighted base	**3,537**	**826**	**14,434**	**5,588**	**14,365**	**2,245**	**4,897**	**242**

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Journey Characteristics: Main Journey Purpose by Ethnicity (Grouped)

BAME passengers were equally likely as White passengers to use a day and night bus to/from work. However, a higher proportion of White passengers used a bus for leisure compared to BAME passengers, while BAME passengers were more likely to use a bus to/from school or education compared to White passengers.

Main Purpose of Journey by Ethnicity (Grouped) – Day and Night Bus Passengers
%

	White		BAME	
	Day	**Night**	**Day**	**Night**
Travelling to/from work	52	50	52	51
Employer Business	1	1	2	2
To/from school/education	4	2	10	5
To/from shopping	12	1	9	2
Visiting friends/relatives	9	13	9	15
Leisure	10	23	5	14
Personal Business	2	1	3	2
Healthcare Appointment	3	-	2	-
Taking/collecting child	1	-	1	-
Picking up/dropping off someone	-	1	1	-
Holiday/Sightseeing	2	4	1	3
Other	3	5	4	6
Unweighted base	**17,098**	**4,125**	**14,932**	**3,420**

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Journey Characteristics: Main Journey Purpose by Disability (Grouped)

Physically-impaired passengers were less likely to use the bus for travelling to/from work (25% on day buses and 35% on night bus) than passengers who do not have a physical impairment.

Main Purpose of Journey by whether Respondent is Physically Impaired – Day and Night Bus Passengers

%

	Yes		No	
	Day	**Night**	**Day**	**Night**
Travelling to/from work	25	35	55	52
Employer Business	2	3	2	1
To/from school/education	5	5	7	3
To/from shopping	23	3	9	1
Visiting friends/relatives	14	16	8	13
Leisure	8	15	8	19
Personal Business	3	4	2	1
Healthcare Appointment	10	2	2	-
Taking/collecting child	1	1	1	-
Picking up/dropping off someone	1	1	1	-
Holiday/Sightseeing	2	5	2	3
Other	6	11	3	5
Unweighted base	**3,199**	**558**	**28,550**	**6,993**

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Journey Characteristics: Main Journey Purpose by Shift Time Band (Day Passengers only)

The majority of day bus passengers using the bus on a weekday during peak hours are travelling to/from work (80% for Weekday AM Peak and 56% for Weekday PM Peak). Nearly two-thirds of passengers (64%) using the bus on early weekend mornings are also travelling to/from work. Broadly speaking, weekend services are more commonly used for leisure and to/from shopping than weekday services.

Journey Purpose by Shift Time Band – Day Bus Passengers

%

	Weekday AM Peak (05:00-10:00)	Weekday Mid Normal (10:00-16:00)	Weekday PM Peak (16:00-19:00)	Weekday PM Normal (19:00-24:00)	Weekend Early (05:00-10:00)	Weekend Late AM (10:00-13:00)	Weekend Afternoon (13:00-18:00)	Weekend Evening (18:00-24:00)	Night (00:00-05:00)
Travelling to/from work	80	37	56	52	64	26	27	34	51
Employer Business	2	3	2	1	2	1	1	1	2
To/from school/education	6	10	9	5	3	5	5	4	4
To/from shopping	3	19	9	5	7	26	22	8	1
Visiting friends/relatives	2	9	8	13	7	12	17	20	13
Leisure	1	5	6	14	5	13	16	20	18
Personal Business	1	3	2	2	3	5	3	2	1
Healthcare Appointment	2	5	2	1	1	2	2	-	-
Taking/collecting child	1	2	1	-	-	1	1	1	-
Picking up/dropping off someone	-	1	1	1	1	1	1	1	1
Holiday/Sightseeing	1	2	2	2	3	4	3	4	3
Other	1	4	3	4	4	5	4	5	6
Unweighted base	**8,881**	**10,678**	**6,245**	**4,936**	**1,246**	**1,251**	**2,241**	**1,755**	**8,901**

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Journey Characteristics: Access Mode

The majority of day (63%) and night (61%) bus passengers accessed the bus by walking all the way from their origin. Night bus users were slightly more likely (25%) to use another bus as their method of access compared to day bus passengers (21%).

How Passengers Travelled to the Bus Stop – Day and Night Bus Passengers
%
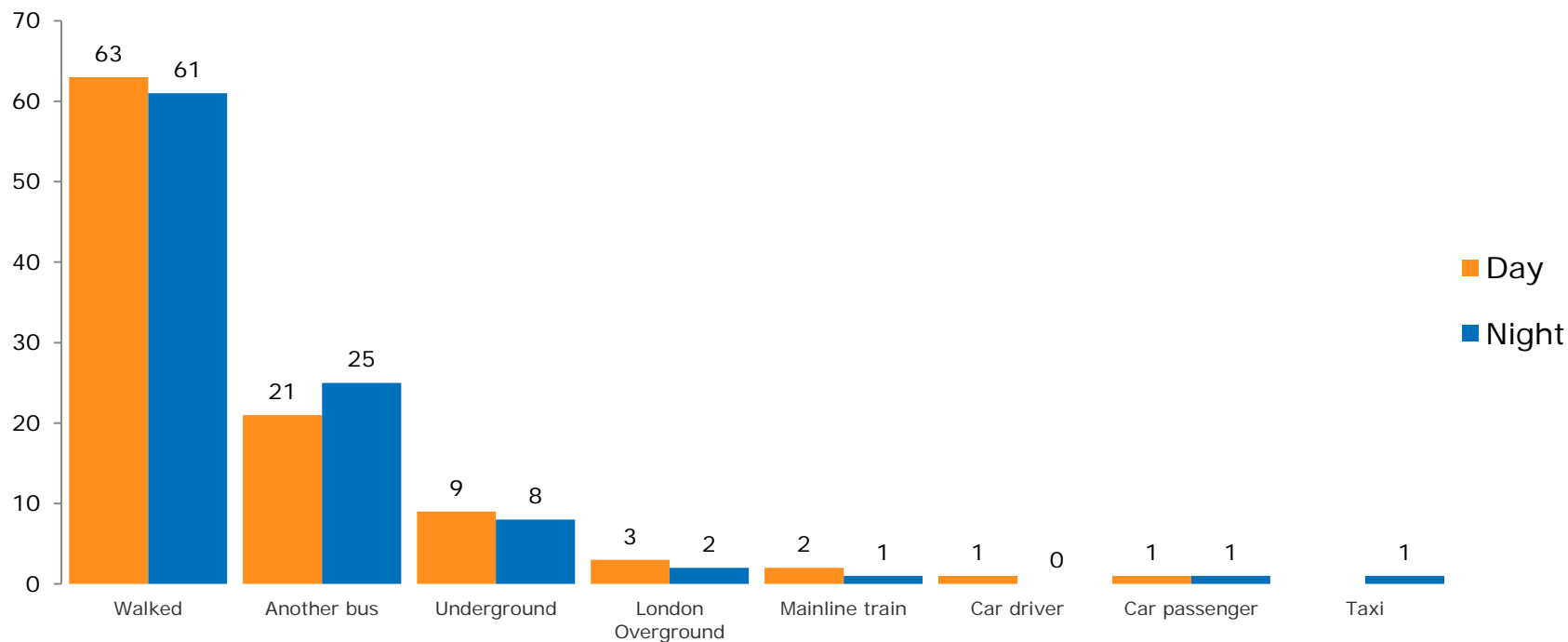
Legend: ■ Day ■ Night

	Walked	Another bus	Underground	London Overground	Mainline train	Car driver	Car passenger	Taxi
Day	63	21	9	3	2	1	1	
Night	61	25	8	2	1	0	1	1

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Journey Characteristics: Egress mode

Night bus passengers were more likely to walk (69%) and use another bus (23%) to reach their destination than day bus passengers (60% and 20% respectively). However, day bus passengers were more likely (11%) to use the Underground to continue their journey compared to night bus passengers (3%).

How Passengers Travelled after the Bus Journey – Day and Night Bus Passengers
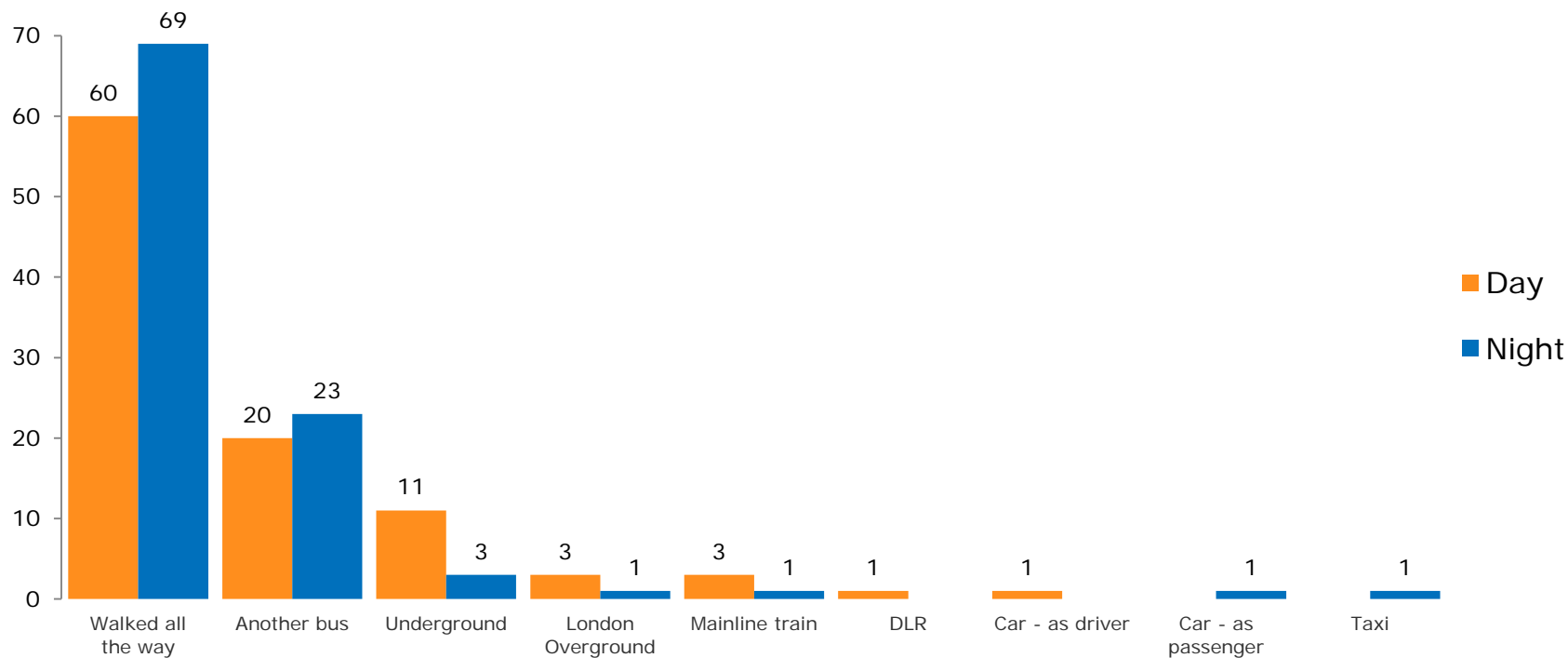
4

Travel Behaviour

Travel Behaviour: Frequency of Use of the Bus Route

Almost half of day bus passengers (49%) and two in five of night bus passengers (40%) use the bus route they were surveyed on five or more days a week.

Frequency of Use: The Bus Route – Day and Night Bus Passengers
%

	Day	Night
5 or more days a week	49	40
3-4 days a week	18	15
2 days a week	10	9
1 day a week	7	7
Once a fortnight	3	5
Once a month	3	6
Less often	10	19

TNS

Transport for London
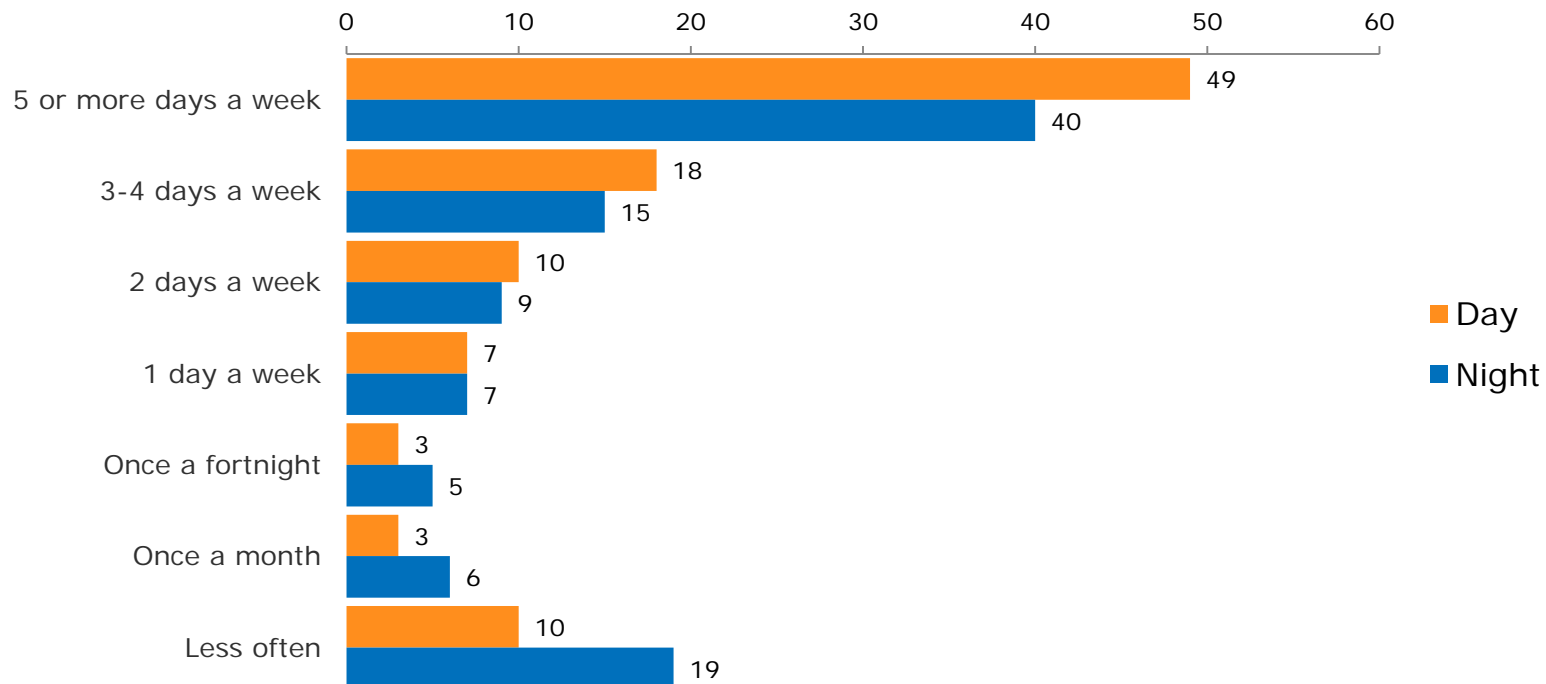
Travel Behaviour: Frequency of Use of Any London Bus

Over half of day (56%) and night (55%) bus passengers use any London bus five or more days a week.

Frequency of Use: Any London Bus Frequency – Day and Night Bus Passengers
%

Q6b. In the last 3 months, how often have you used: Any London bus
Unweighted base: 25,507 Day; 6,177 Night

Bus User Survey 2014
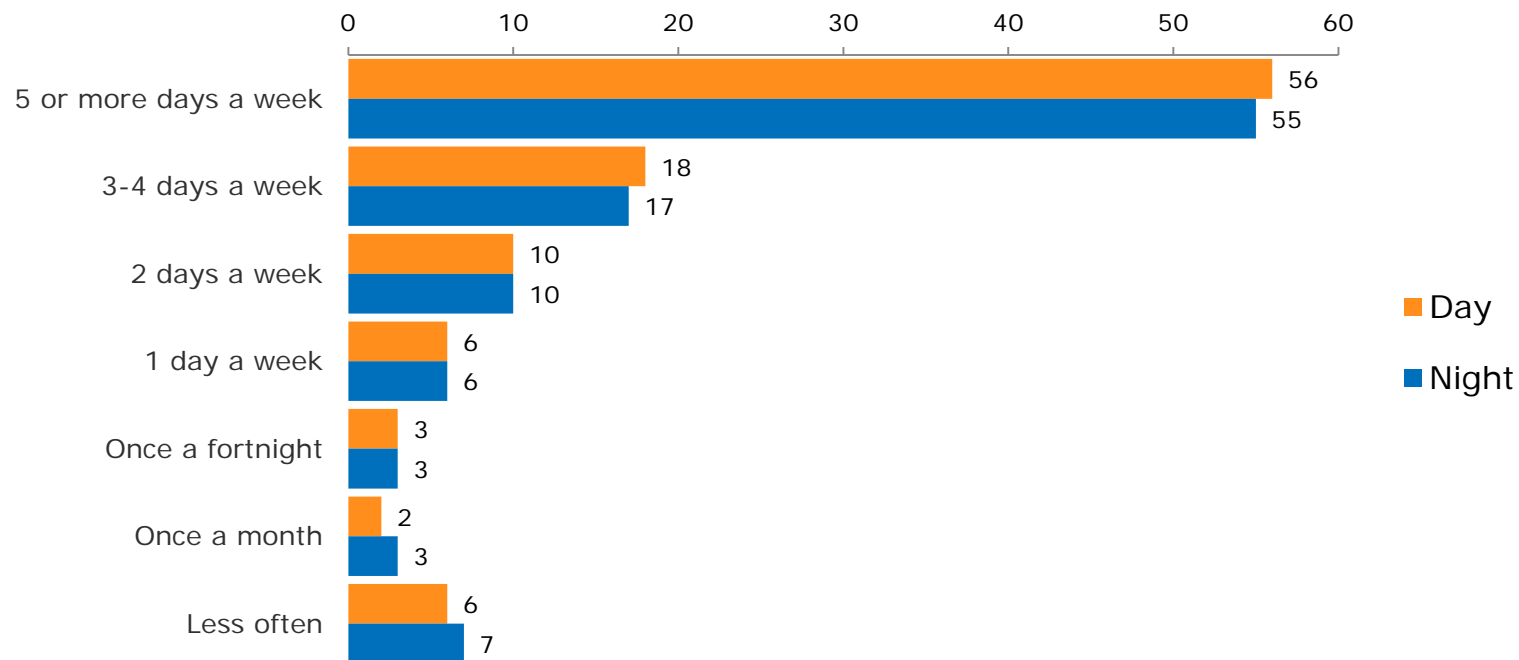
Travel Behaviour: Frequency of Use of Any London Night Bus

Night bus users passengers are more likely to be heavy users (five or more days a week) of London night buses than day bus passengers (28% c.f. 10%). In fact, over half of day bus passengers (52%) use a London night bus less often than once a month.

Frequency of Use: Any London Night Bus Frequency – Day and Night Bus Passengers
%

Frequency	Day	Night
5 or more days a week	10	28
3-4 days a week	5	15
2 days a week	7	14
1 day a week	9	11
Once a fortnight	7	8
Once a month	10	8
Less often	52	16

TNS

Transport for London
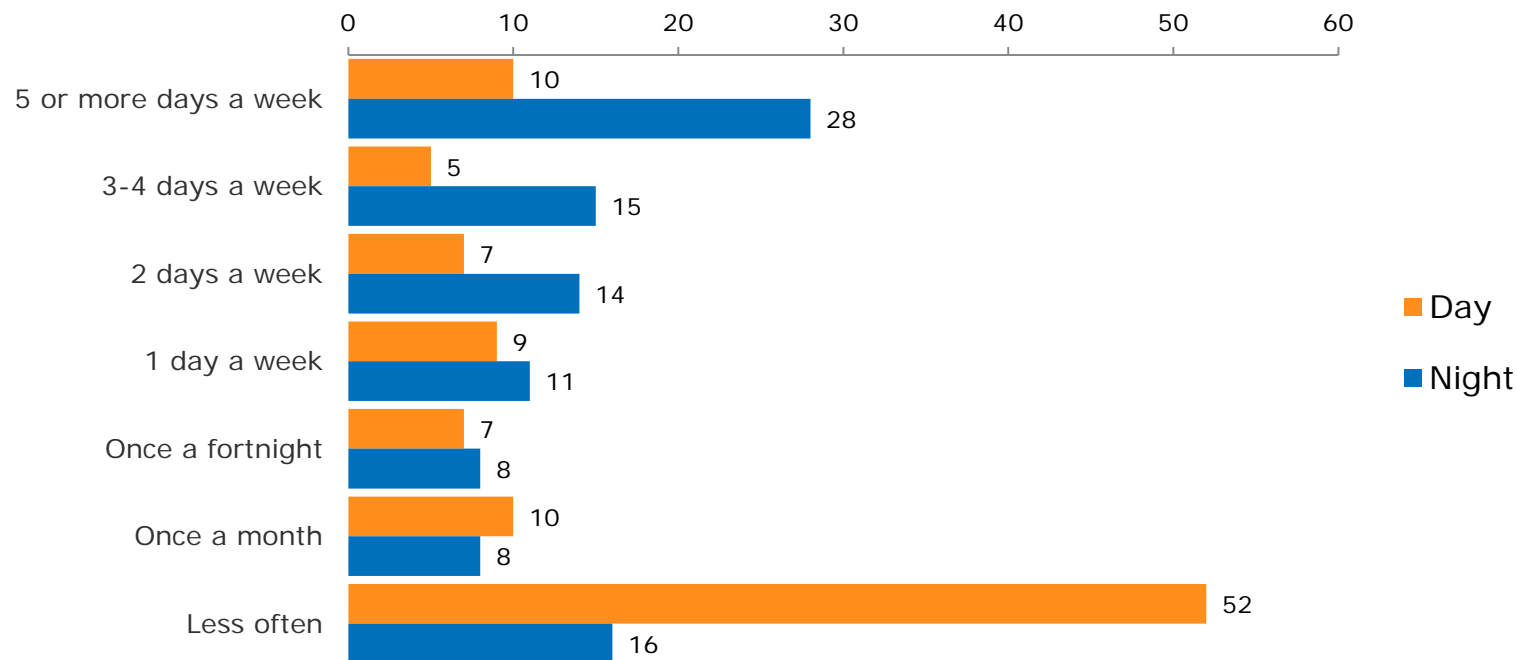
Travel Behaviour: Frequency of Use of Underground / Docklands Light Railway

Night bus passengers are more frequent users of the Underground or Docklands Light Railway than day passengers (44% c.f. 33%). The proportion of passengers who have not used the Underground or Docklands Light Railway in the last three months is higher for day bus passengers (14%) than night bus passengers (10%).

Usage of Other Transport Links: Underground / Docklands Light Railway – Day and Night Bus Passengers

%

Frequency	Day	Night
5 or more days a week	33	44
3-4 days a week	11	13
2 days a week	10	10
1 day a week	9	8
Once a fortnight	6	4
Once a month	8	5
Less often	10	7
Not used in last three months	14	10

Q7a. In the last 3 months, how often have you used the following forms of transport in London: Underground/Docklands Light Railway
Unweighted base: 32,121 Day; 7,854 Night

Bus User Survey 2014   41
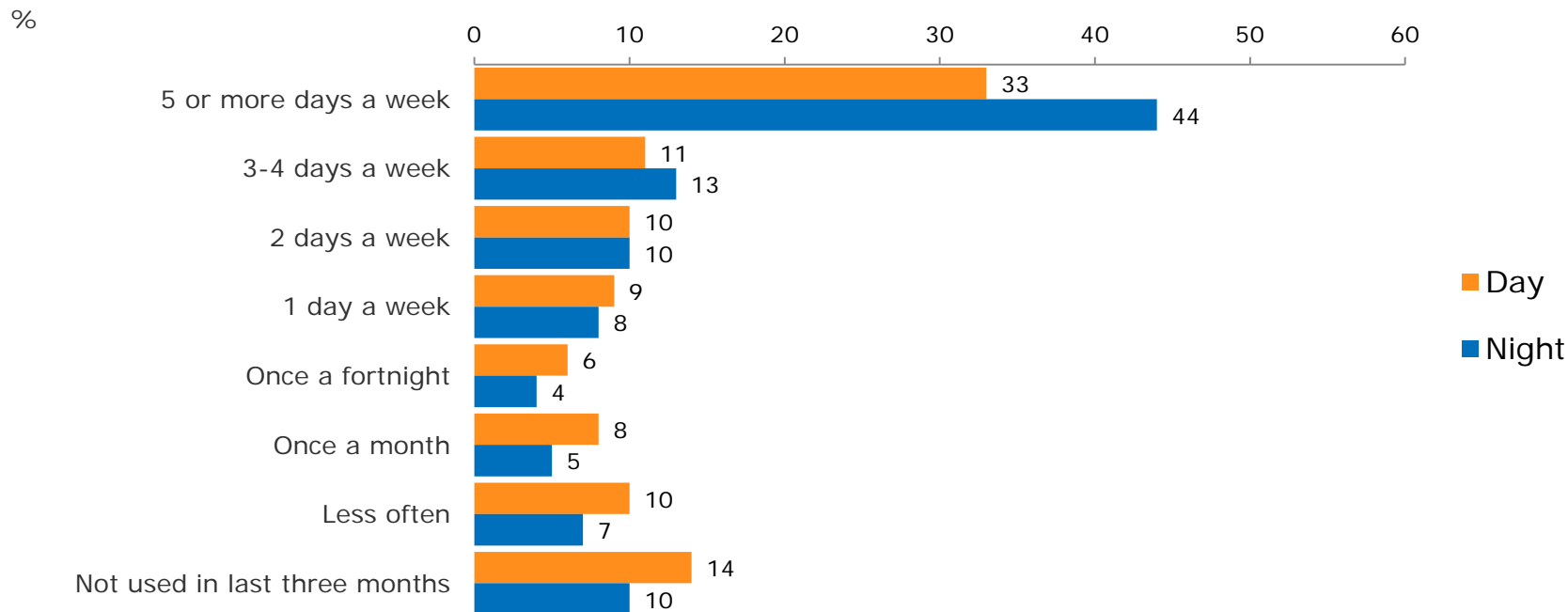
Travel Behaviour: Frequency of Use of Mainline Train

Almost one in five day and night bus passengers are frequent (five or more days per week) users of mainline trains. Meanwhile, 21% and 23% of day and night bus passengers respectively have not used a mainline train in the past three months.

Usage of Other Transport Links: Mainline train – Day and Night Bus Passengers
%
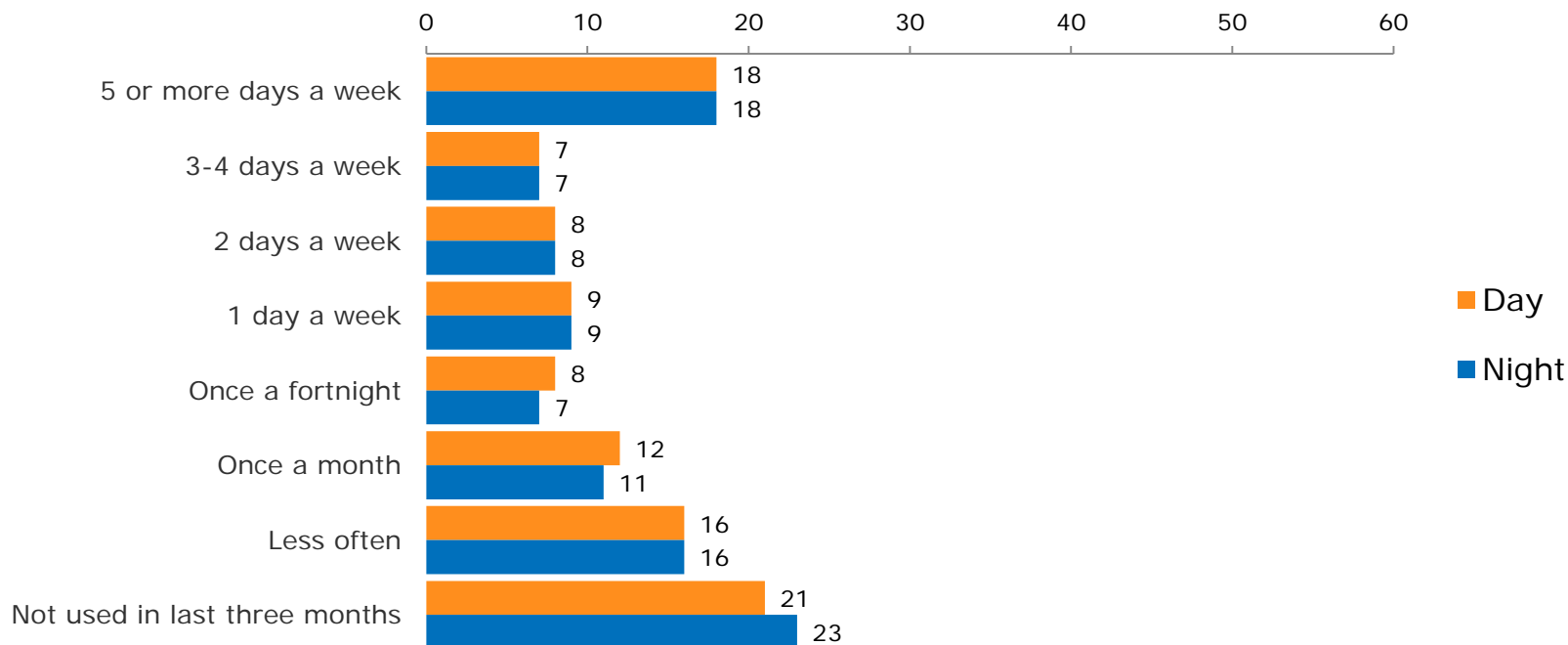
Travel Behaviour: Frequency of Use of Car / Van

Over a third of day bus passengers (35%) and almost half of night bus passengers (46%) have not used a car or van in the last three months. Just 12% of day bus passengers and 9% of night bus passengers are frequent (five or more days per week) car or van users.

Usage of Other Transport Links: Car / Van – Day and Night Bus Passengers
%

	Day	Night
5 or more days a week	12	9
3-4 days a week	8	5
2 days a week	11	6
1 day a week	9	6
Once a fortnight	5	4
Once a month	5	6
Less often	15	17
Not used in last three months	35	46

TNS

Transport for London
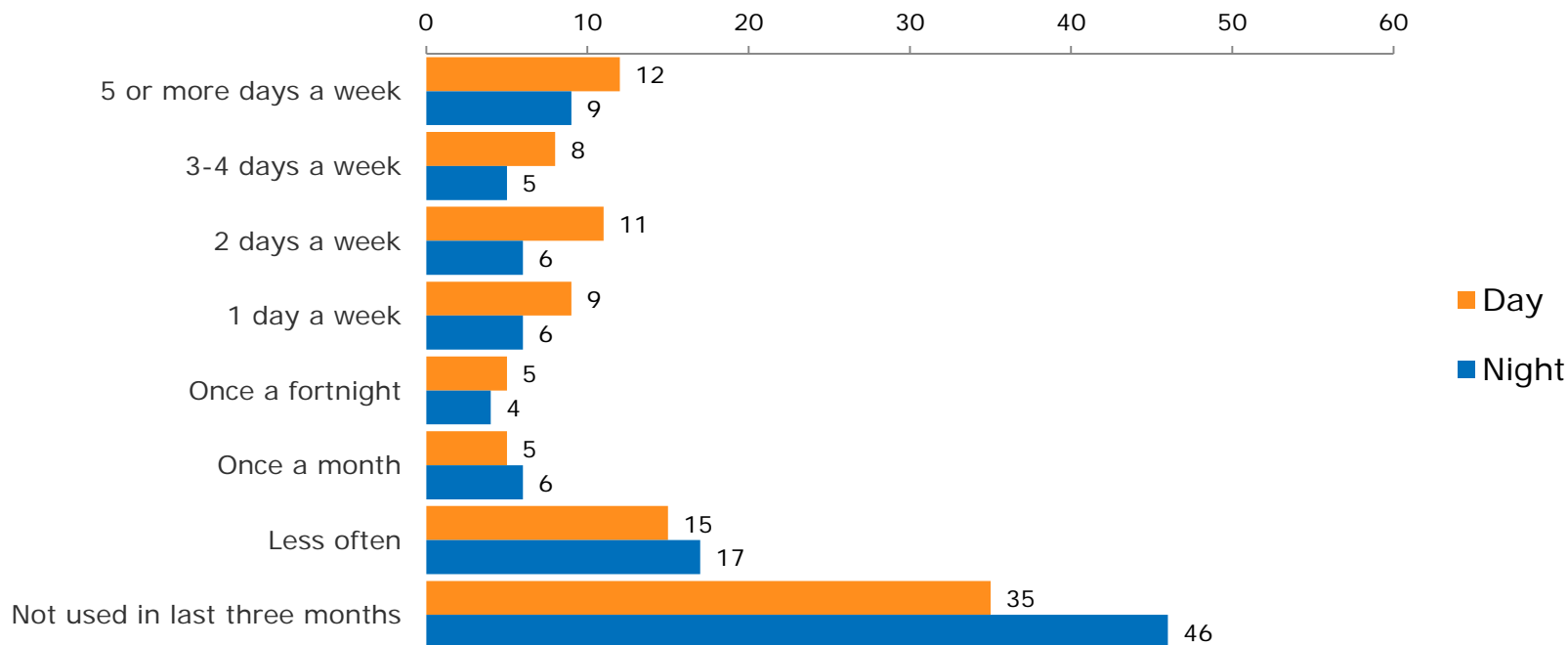
Travel Behaviour: Access to a Car Which Could Have Been Used for the Journey

The proportion of day bus passengers who have access to a car which they could have used for their journey instead of a bus is 21%. In comparison, night bus passengers are less likely (13%) to have had access to a car.

Access to a Car for the Journey – Day Bus Passengers
%

21

79

■ Yes
■ No
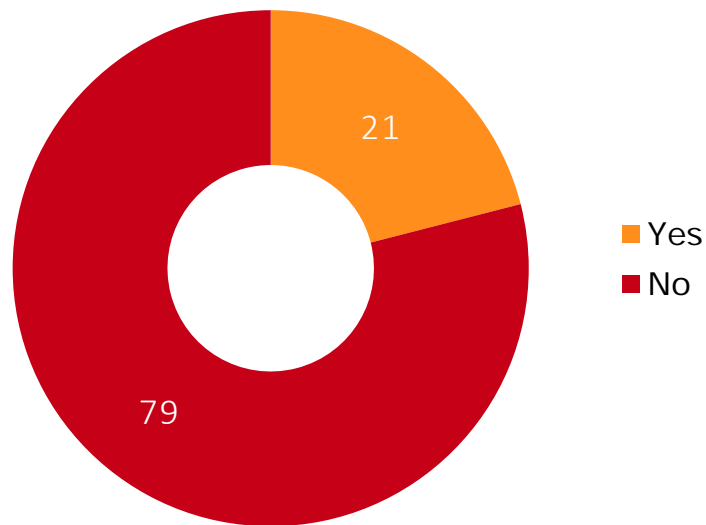
Access to a Car for the Journey – Night Bus Passengers
%

13

87

■ Yes
■ No

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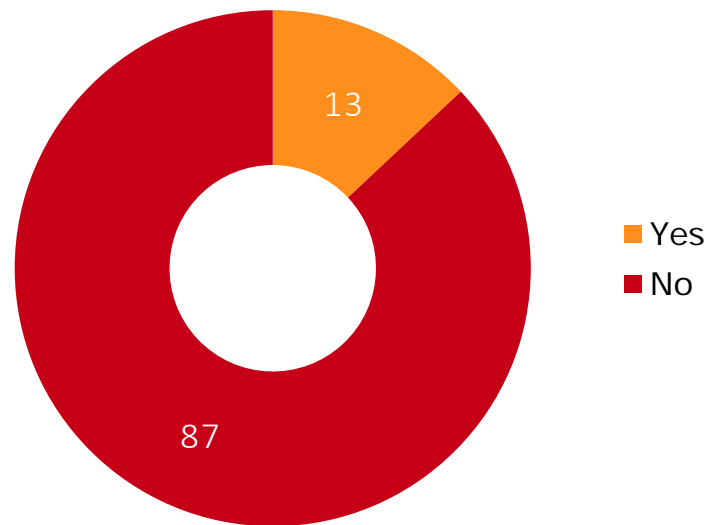
Travel Behaviour: Access to a Car Which Could Have Been Used for the Journey by Occupation of Household Chief Income Earner

Bus passengers who live in a household where the chief income earner is in a managerial position are more likely than other passengers to have access to a car.

Access to a Car for the Journey by Occupation of Household Chief Income Earner – Day and Night Bus Passengers
%

	Yes		No	
	Day	**Night**	**Day**	**Night**
High managerial	28	23	15	14
Intermediate managerial	27	20	21	17
Supervisor, clerical	19	22	22	23
Skilled, manual worker	10	12	11	12
Semi-skilled or unskilled manual worker	5	7	9	11
Student/full time education	4	7	9	13
Unemployed	4	4	8	6
Other	3	4	5	5
Unweighted base	**5,541**	**860**	**19,933**	**5,513**

Q9. Did you have access to a car which you could have used for this journey? Q16. Which of the following best describes the occupation of the chief income earner in your household?
Unweighted base: 25,474 Day; 6,373 Night
Note: Figures under 0.5% are not shown (Househusband/Housewife was removed)

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Transport for London

Bus User Survey 2014   45

5

Ticket Information

Ticket Information: Type of Ticket

Day and night bus passengers most commonly used an Oyster Travelcard for their journey (33% and 40% respectively). Oyster pay as you go was the second most common type of ticket used by a third of day (31%) and night bus users (34%).

Type of Ticket – Day and Night Bus Passengers
%
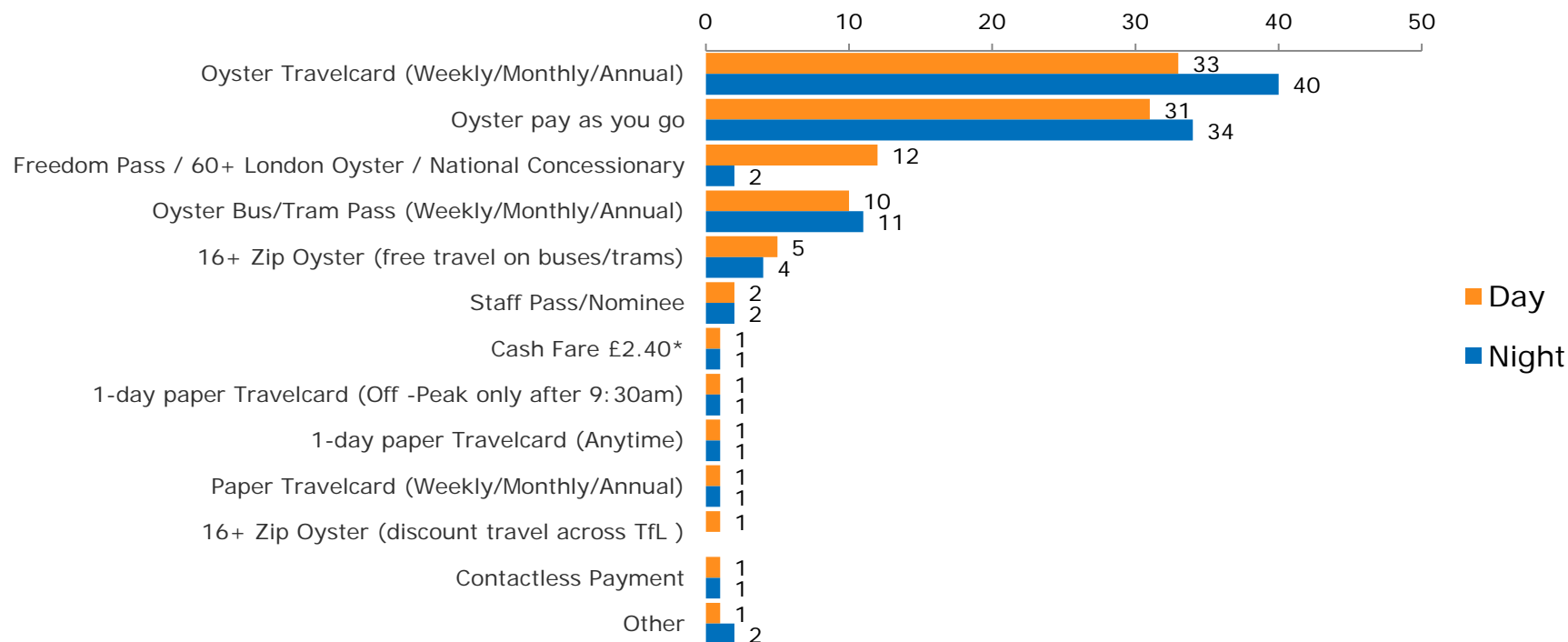
Legend: ■ Day ■ Night

Type of Ticket	Day	Night
Oyster Travelcard (Weekly/Monthly/Annual)	33	40
Oyster pay as you go	31	34
Freedom Pass / 60+ London Oyster / National Concessionary	12	2
Oyster Bus/Tram Pass (Weekly/Monthly/Annual)	10	11
16+ Zip Oyster (free travel on buses/trams)	5	4
Staff Pass/Nominee	2	2
Cash Fare £2.40*	1	1
1-day paper Travelcard (Off -Peak only after 9:30am)	1	1
1-day paper Travelcard (Anytime)	1	1
Paper Travelcard (Weekly/Monthly/Annual)	1	1
16+ Zip Oyster (discount travel across TfL)	1	
Contactless Payment	1	1
Other	1	2

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Transport for London

Bus User Survey 2014

Ticket Information: Frequency of Travel by Ticket Type (Grouped)

Frequency of bus usage varies by ticket type among day and night bus passengers. Passengers using Bus / Tram Passes, 16+ Zip Oyster holders and Oyster / Paper Travelcard holders are more likely than holders of other ticket types to use a bus at least five days a week. Passengers paying cash fares are the most likely to use a bus less often than once a month.

Frequency of Travel on any London Bus by Ticket Type (Grouped)

%

	Oyster / Paper Travelcards		Oyster pay as you go		Freedom Pass/60+ Oyster/National Concessionary		Bus / Tram Passes	
	Day	**Night**	**Day**	**Night**	**Day**	**Night**	**Day**	**Night**
5+ days a week	66	64	39	38	46	53	76	74
3-4 days a week	14	15	23	21	23	26	11	11
2 days a week	7	8	13	13	13	8	6	7
1 day a week	4	4	8	9	7	4	2	3
Once a fortnight	2	2	4	5	3	3	1	1
Once a month	2	2	4	5	3	4	1	1
Less often	5	6	9	9	5	3	3	3
Unweighted base	**9,057**	**2,638**	**7,838**	**2,122**	**2,722**	**120**	**2,534**	**631**

	16+ Zip Oyster		Staff Pass/ Nominee		Cash Fare £2.40*		Contactless Payment		Other	
	Day	**Night**	**Day**	**Night**	**Day**	**Night****	**Day**	**Night****	**Day**	**Night**
5+ days a week	69	78	56	60	24	34	36	48	51	43
3-4 days a week	17	15	19	18	18	13	22	14	14	20
2 days a week	6	3	10	8	7	4	12	9	9	8
1 day a week	3	2	7	6	9	3	10	8	4	4
Once a fortnight	2	-	2	3	5	-	6	6	5	4
Once a month	1	1	2	1	6	9	3	6	3	6
Less often	3	1	6	4	30	37	11	10	15	16
Unweighted base	**1,911**	**283**	**432**	**122**	**175**	**30**	**249**	**55**	**256**	**105**

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Transport for London

Bus User Survey 2014

48

6

Weekend Night Passenger and Journey Characteristics
(Friday & Saturday users only)

Weekend Night Passenger and Journey Characteristics: Introduction

Definitions:

- Weekend night passengers are those who travel on a night bus on Friday / Saturday and Saturday / Sunday.

Background:

- Transport for London announced in September 2014 that 24-hour 'Night Tube' services at weekends will begin operation from the early hours of 12 September 2015, transforming night time journeys across London for millions of people.

- With the tube service set to run 24 hours from 2015, the purpose of this section to profile users of night buses on Friday / Saturday and Saturday / Sunday only.

Contents:

- Passenger Characteristics

- Journey Characteristics

- Ticket Information

Weekend Night Passenger Characteristics: Gender

The majority of night bus passengers travelling at the weekend are male (58%).

Gender – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
%

- ■ Male
- ■ Female

42

58

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for London

Bus User Survey 2014
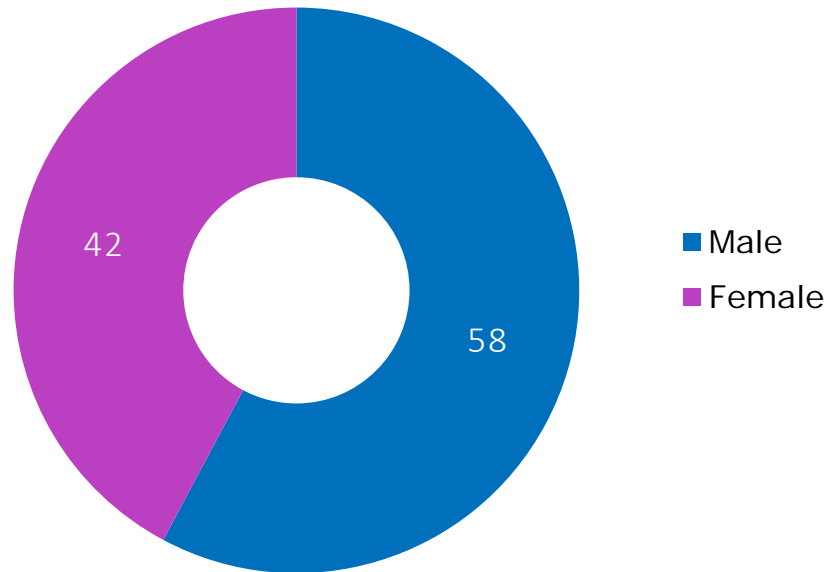
Weekend Night Passenger Characteristics: Gender Comparison with Londoners

Female weekend night bus passengers make up 42% of the passengers surveyed compared with a London percentage of 51%. In contrast, weekend night bus passengers are more likely to be male (58%) than the general London population (49%).

Gender – Comparison between Weekend Night Bus Passengers and Londoners
(Friday/Saturday & Saturday/Sunday only)
%

Legend:
- London*
- Weekend Night

Male: London* 49, Weekend Night 58
Female: London* 51, Weekend Night 42

Q3. Are you …?
Unweighted base: 3,274
*London figures based on the 2011 Census

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Transport for London

Bus User Survey 2014
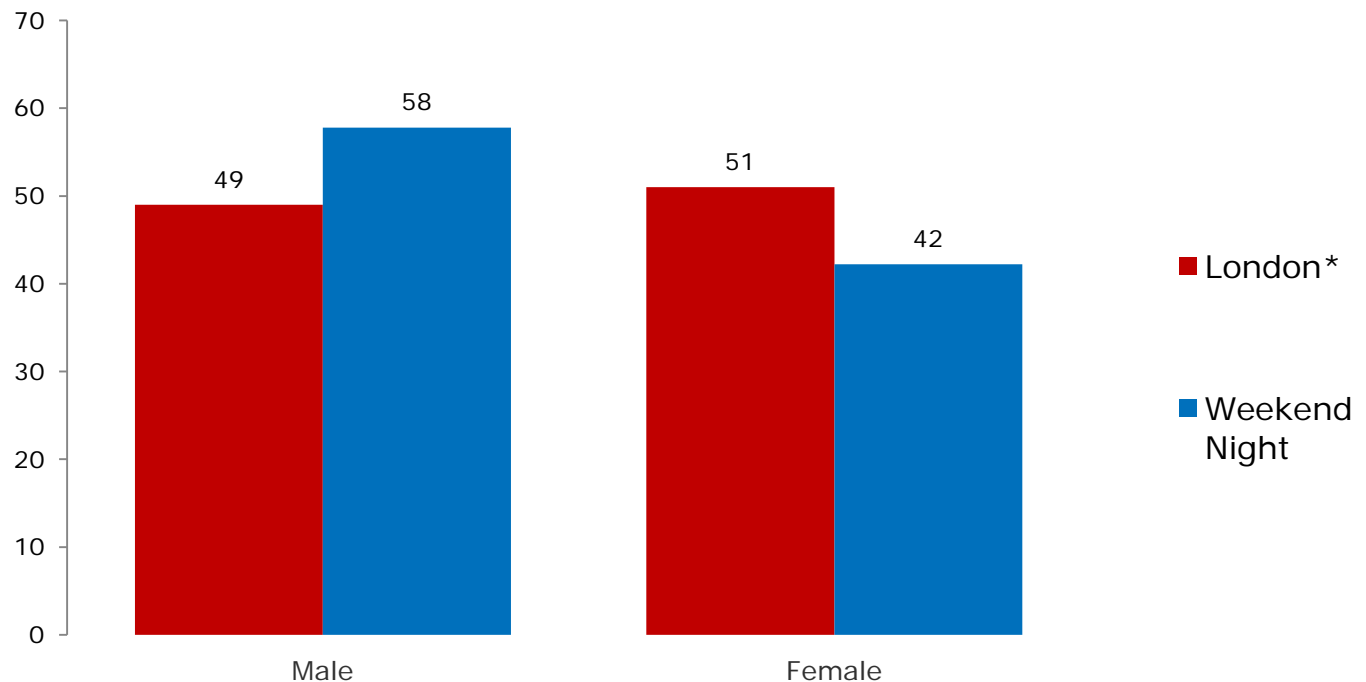
Weekend Night Passenger Characteristics: Age

Around two thirds of weekend night bus passengers are aged between 20 and 34.

Age – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
%
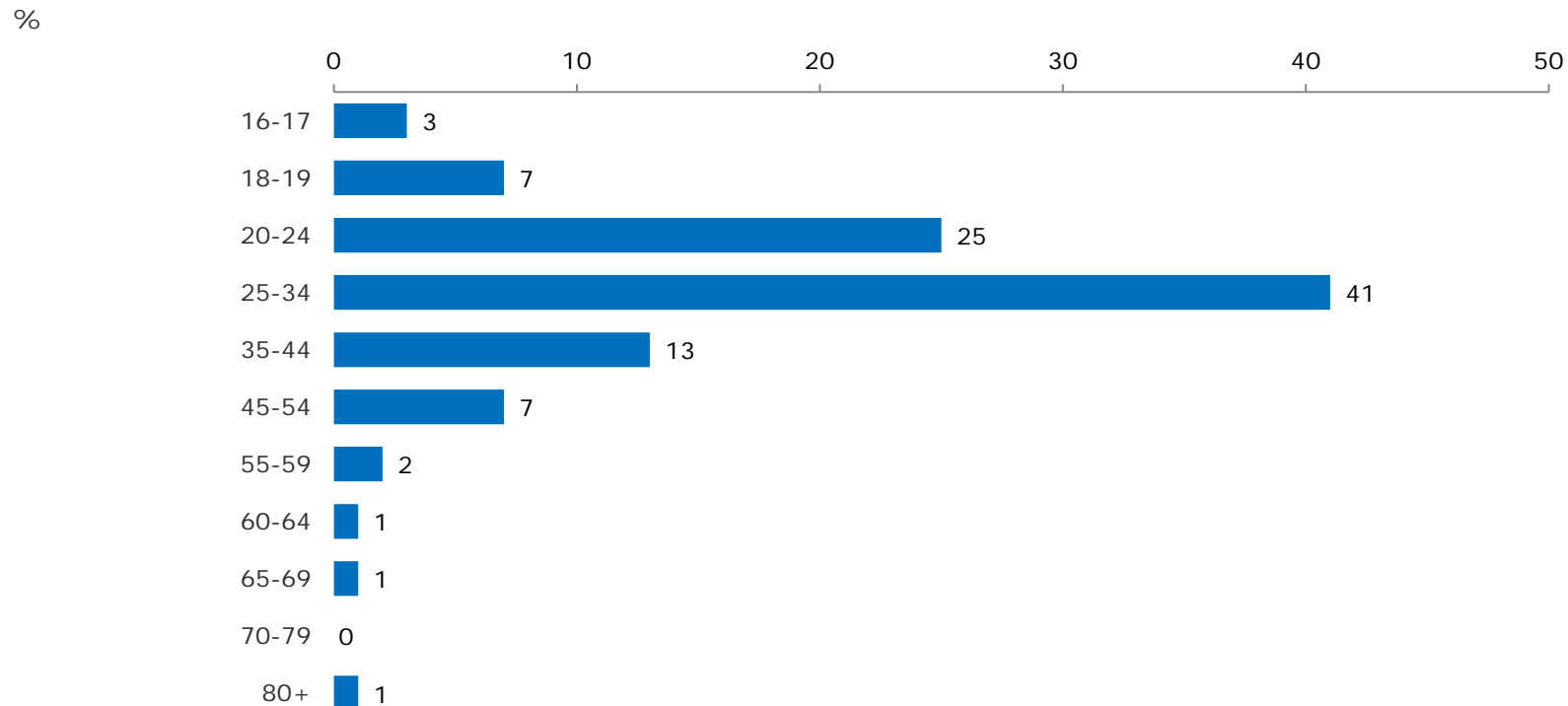
Age	%
16-17	3
18-19	7
20-24	25
25-34	41
35-44	13
45-54	7
55-59	2
60-64	1
65-69	1
70-79	0
80+	1

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Weekend Night Passenger Characteristics: Age Comparison with Londoners

Compared to the London population in general, those aged between 18 and 34 are over-represented among weekend night bus passengers, while those aged over 35 are under-represented.

Age – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
%

Legend:
■ London
■ Weekend Night

Age	London	Weekend Night
16-17	3	3
18-19	3	7
20-24	10	25
25-34	25	41
35-44	19	13
45-54	16	7
55-59	6	2
60-64	5	1
65-69	4	1
70-79	6	
80+	4	1

TNS

BUSES

Transport for London
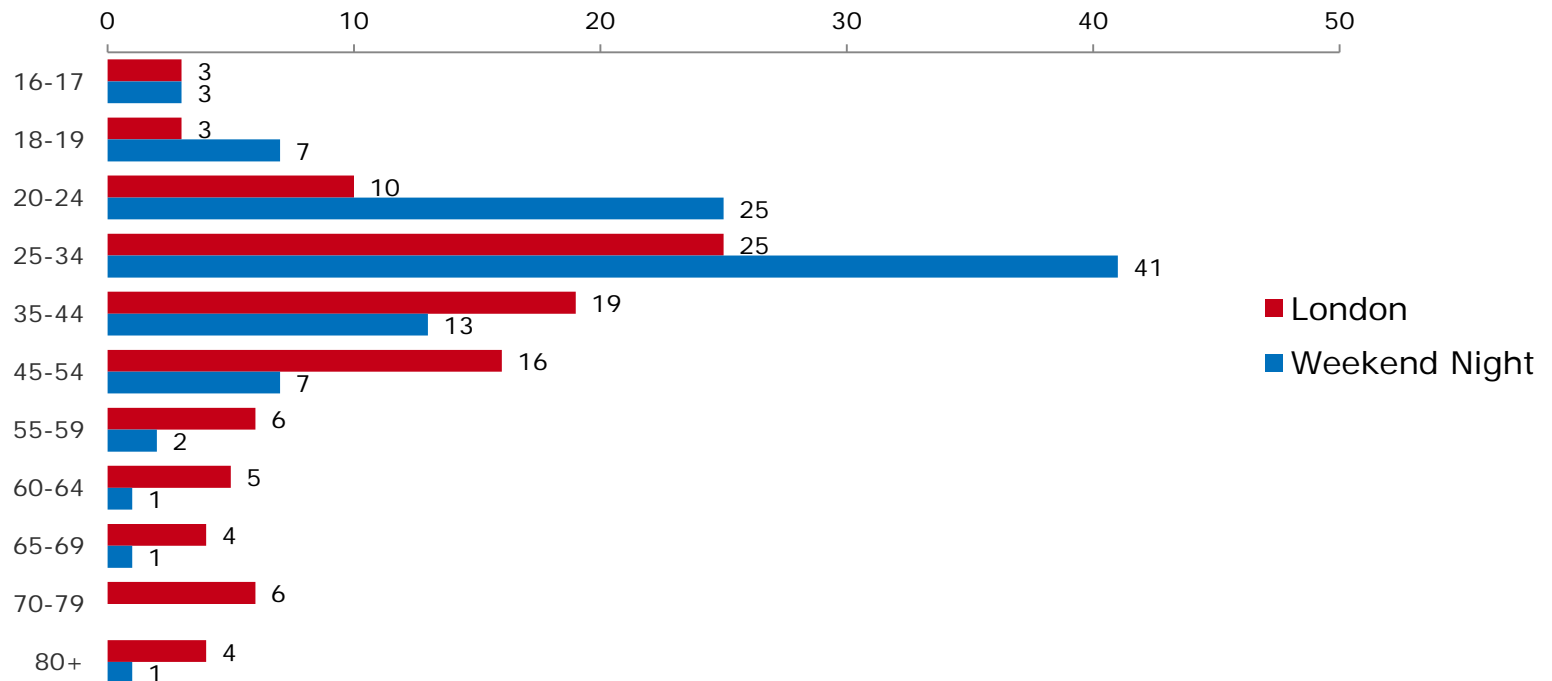
Weekend Night Passenger Characteristics: Gender by Age

Among weekend night bus passengers aged 16-19, the gender split is fairly even. However, weekend night bus passengers aged over 35 are more likely to be male.

Gender by Age Group – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
%

■ Male
■ Female

TNS

BUSES   Transport for London
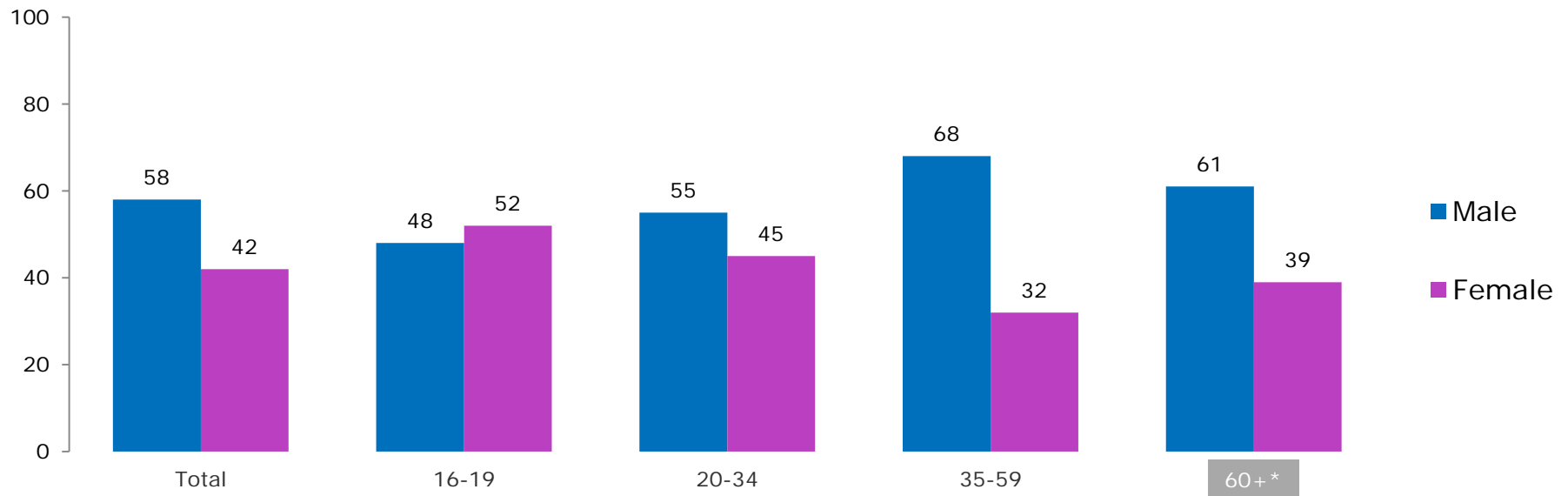
Weekend Night Passenger Characteristics: Annual Household Income

On weekend night bus services, passengers most commonly have an annual household income of up to £10,000, with one in five classifying themselves in this category (21%).

Annual Household Income – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
%

Income band	%
Up to £10,000	21
£10,001 to £15,000	15
£15,001 to £20,000	12
£20,001 to £30,000	18
£30,001 to £40,000	12
£40,001 to £75,000	12
£75,001+	10
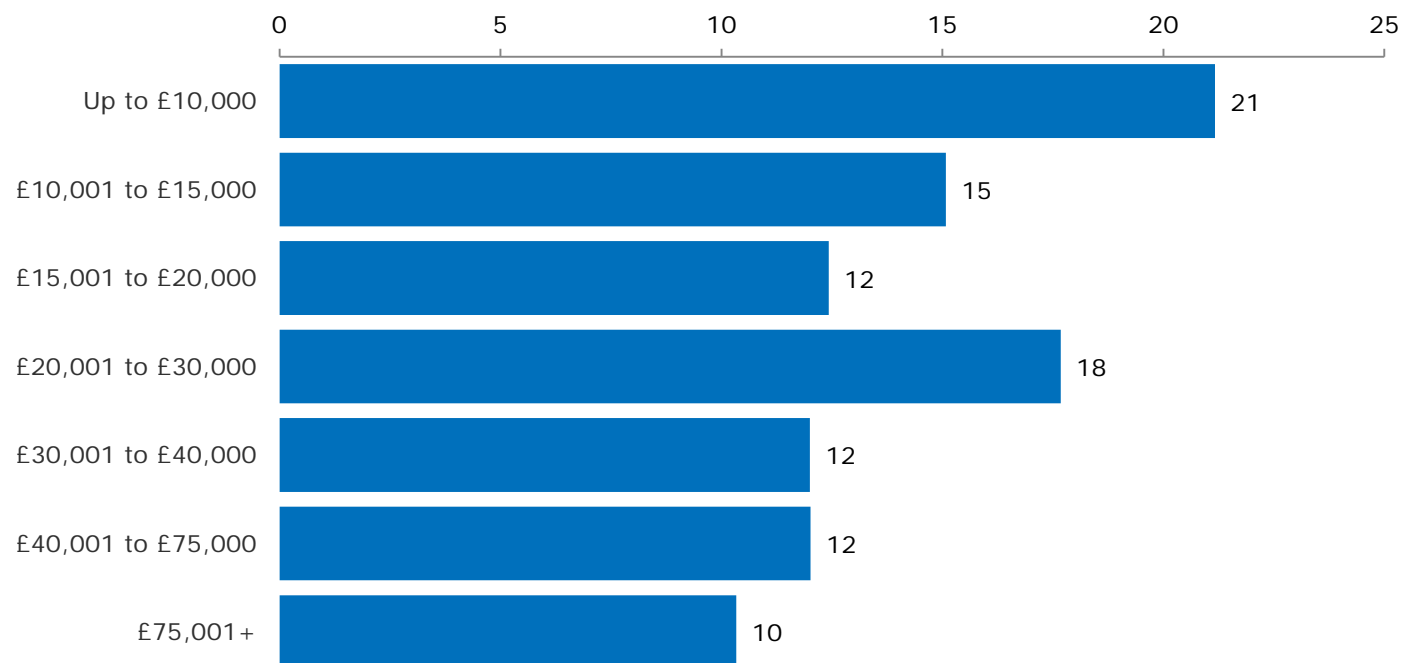
Q17. Please could you indicate which of the following bands your annual household income falls into, before tax and other deductions?
Unweighted base: 2,626

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Weekend Night Journey Characteristics: Journey Purpose

Travelling to/from work was the most common reason for making their night bus journey at the weekend (38%), although this was a lower proportion than among night bus users overall (51%). Leisure was the second most cited journey purpose (27%), followed by visiting friends/relatives (15%).

Journey Purpose – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
%
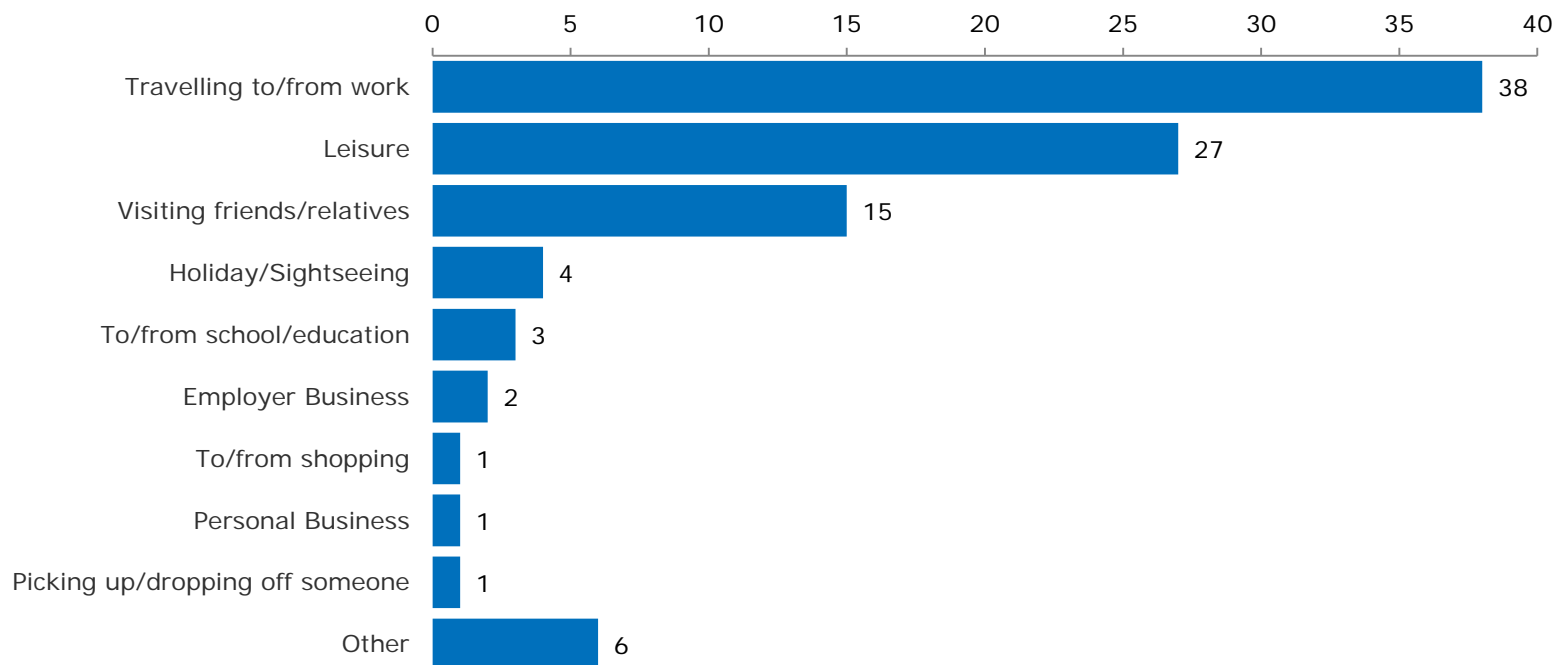
Journey Purpose	%
Travelling to/from work	38
Leisure	27
Visiting friends/relatives	15
Holiday/Sightseeing	4
To/from school/education	3
Employer Business	2
To/from shopping	1
Personal Business	1
Picking up/dropping off someone	1
Other	6

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Weekend Night Journey Characteristics: Access Mode

The majority of weekend night bus passengers (62%) accessed the bus by walking all the way from their origin, while 22% used another bus.

How Passengers Travelled to the Bus Stop – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
%

Access Mode	%
Walked all the way	62
Another bus	22
Underground	9
London Overground	2
Mainline train	1
Taxi	1

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BUSES Transport for London

Bus User Survey 2014
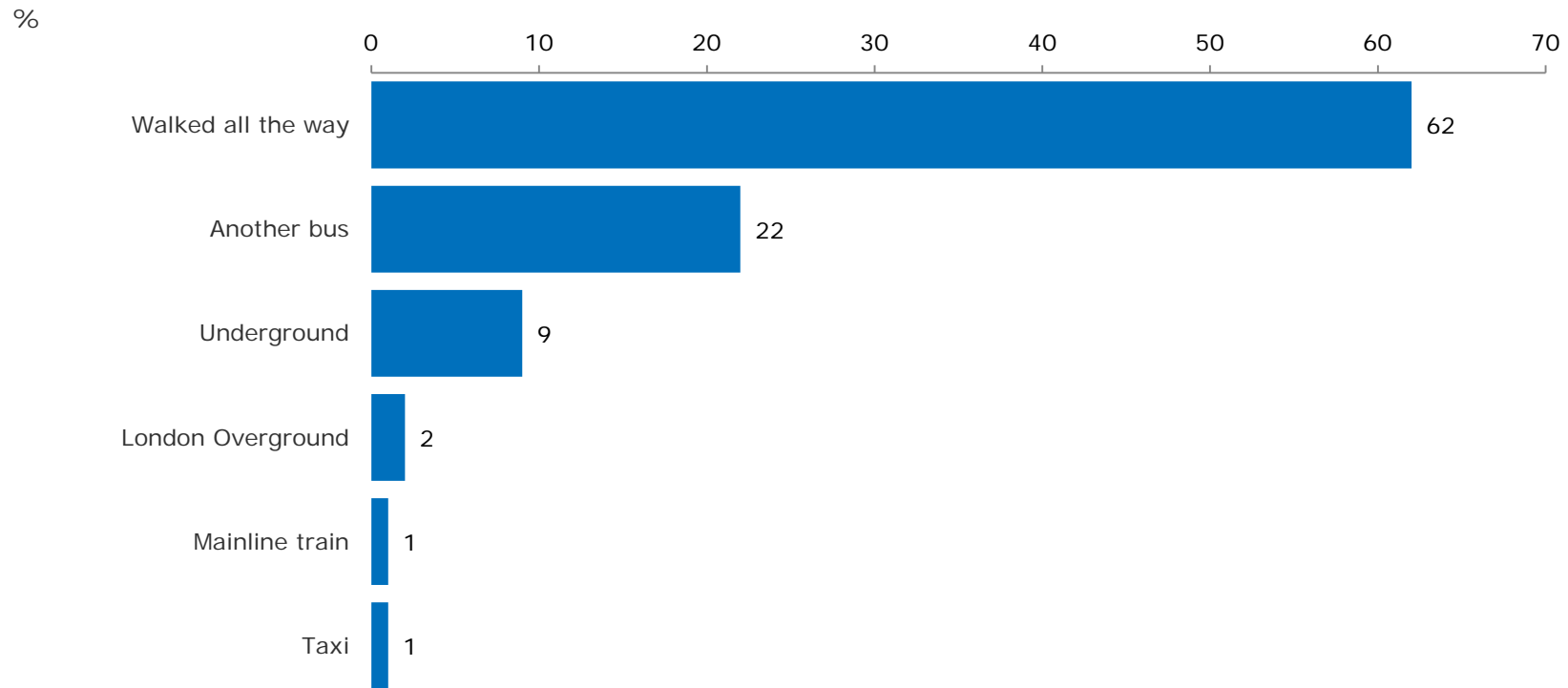
Weekend Night Journey Characteristics: Egress Mode

Over two thirds of weekend night bus passengers (71%) walked all the way after alighting the bus to reach their destination, while 21% used another bus to complete their journey.

How Passengers Travelled after the Bus Journey – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
%

Mode	%
Walked all the way	71
Another bus	21
Underground	3
London Overground	1
Mainline train	1
Car - as passenger	1
Bicycle	1
Taxi	1

TNS

BUSES Transport for London

Bus User Survey 2014
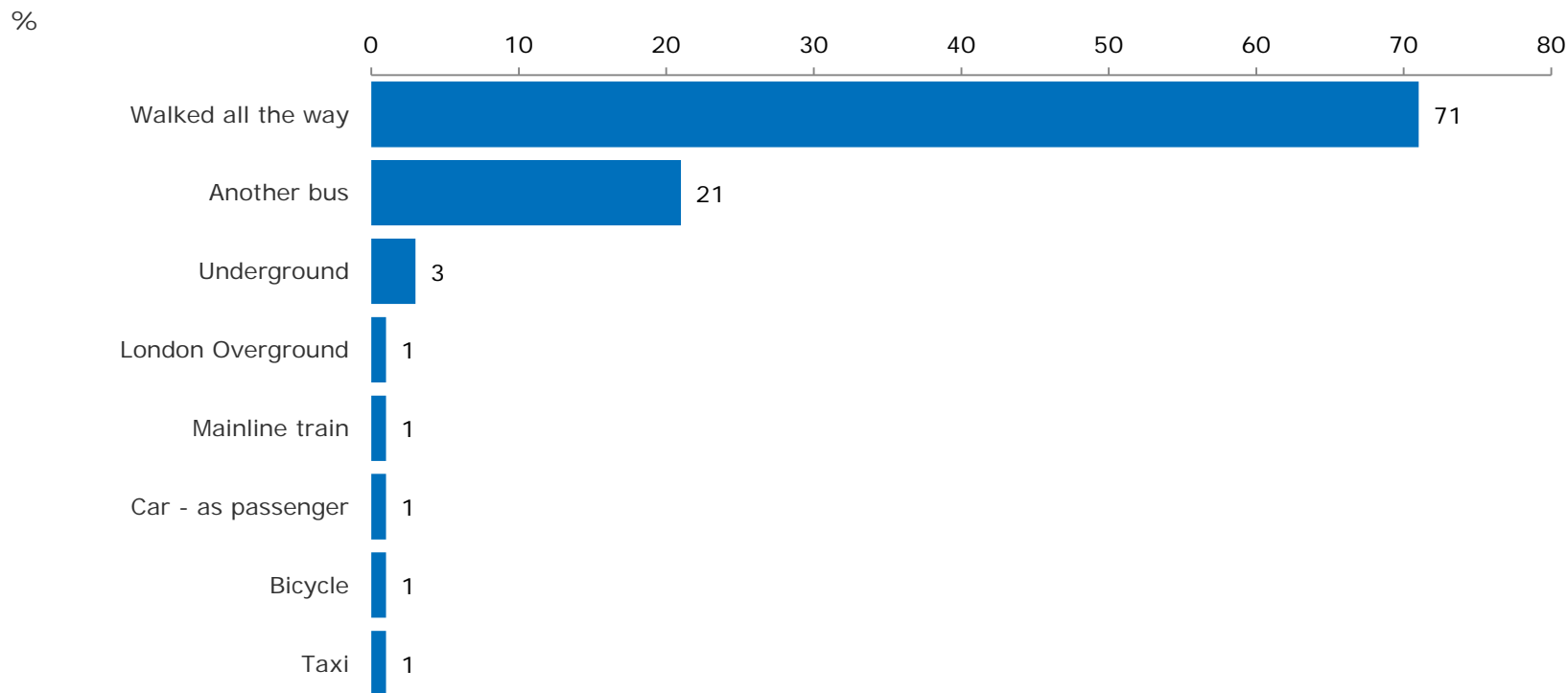
Weekend Night Ticket Information: Ticket Type

The types of tickets used on weekend night bus services largely reflect the overall trend with Oyster pay as you go (39%) and Oyster Travelcard (38%) the most common tickets used.

Ticket Type – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
%

Ticket Type	%
Oyster PAYG	39
Oyster Travelcard	38
Oyster Bus/Tram Pass	9
16+ Zip Oyster (free travel on buses/trams)	3
Freedom Pass/60+ London Oyster/National Concessionary	2
Staff Pass/Nominee	2
Paper Travelcard (Weekly/Monthly/Annual)	1
Contactless Payment	1
1-day Paper Travelcard (OP)	1
1-day Paper Travelcard (Anytime)	1
Cash Fare £2.40	1
Other	2
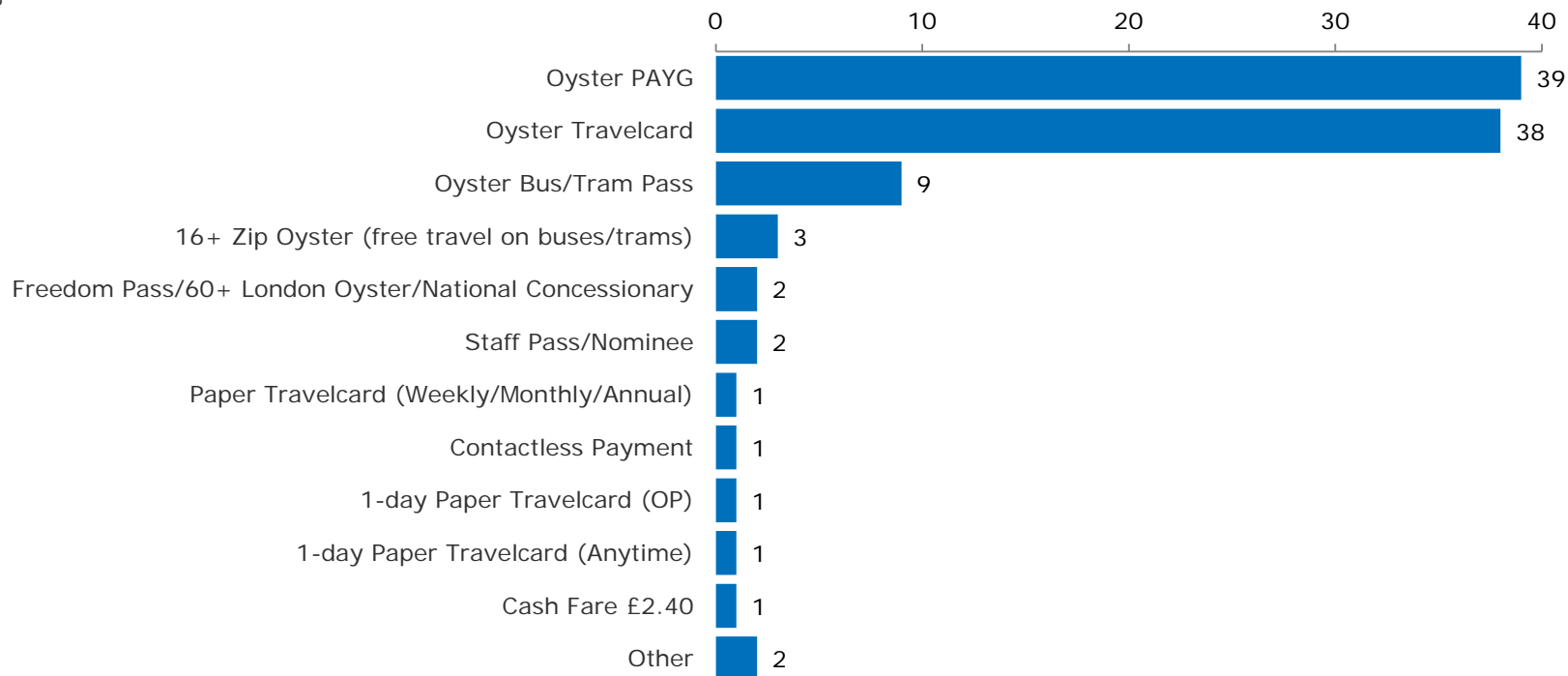
7

Appendix 1: Journey Characteristics (Detailed)

Journey Characteristics: Route Type

The distribution of completed interviews by route type is shown in the chart below.

Route Type – Day and Night Bus Passengers
%

Legend: Day (orange), Night (blue)

Route Type	Day	Night
Central	13	13
North Radial	26	43
North Orbital	22	6
South Radial	23	34
South Orbital	16	4

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BUSES   Transport for London
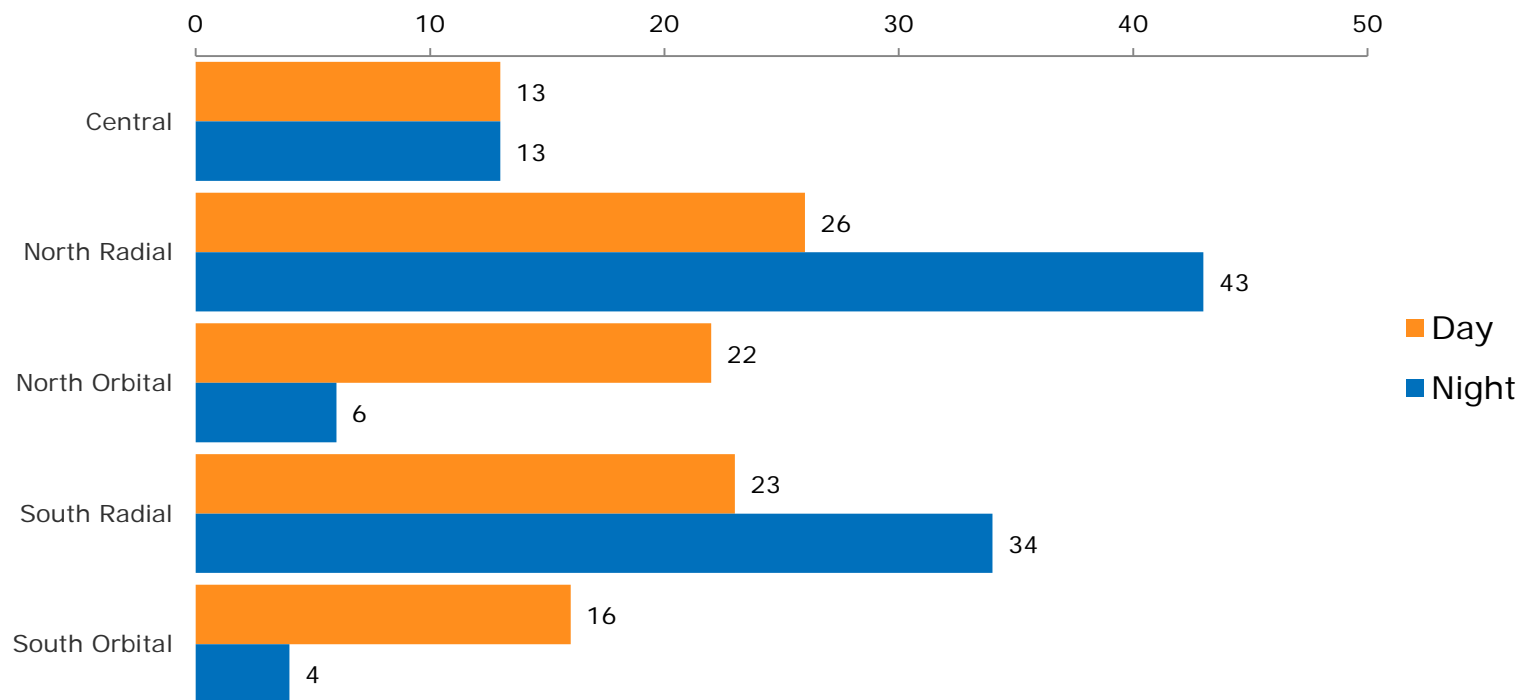
Journey Characteristics: Bus Type

The distribution of completed interviews by bus type is shown in the chart below.

Bus Type – Day and Night Bus Passengers

%

Legend:
- Day (orange)
- Night (blue)

Bus Type	Day	Night
Single Decker - 1 door	4	
Single Decker - 2 door	24	3
Double Decker - 2 door	69	94
New Routemaster - 3 door	3	3

TNS
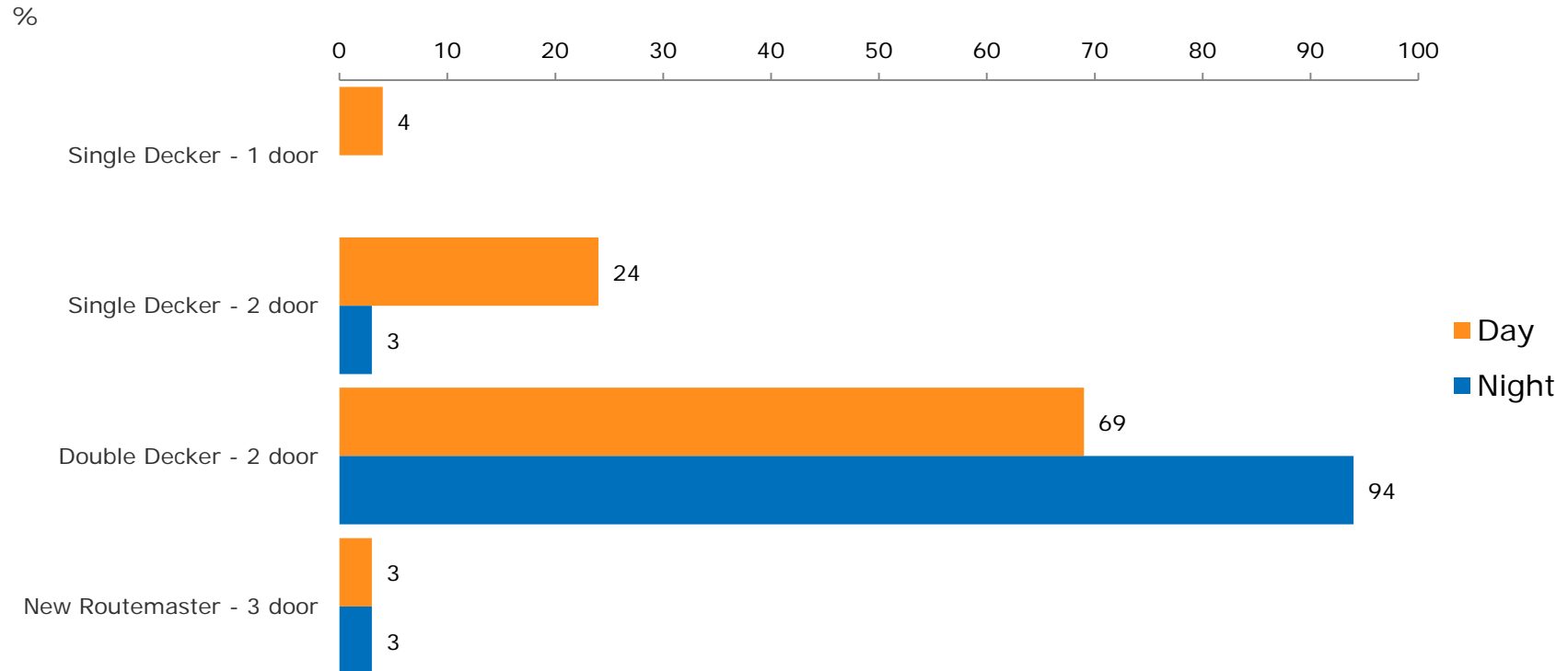
Journey Characteristics: Day of the Week Travel

The distribution of completed interviews by day of the week can be seen in the charts below.

Day of the Week Travel – Day Bus Passengers
%

Monday: Day 14, Passenger Volumes 13/14 15
Tuesday: Day 18, Passenger Volumes 13/14 16
Wednesday: Day 16, Passenger Volumes 13/14 15
Thursday: Day 20, Passenger Volumes 13/14 16
Friday: Day 14, Passenger Volumes 13/14 16
Saturday: Day 11, Passenger Volumes 13/14 12
Sunday: Day 7, Passenger Volumes 13/14 9

Legend:
- Day
- Passenger Volumes 13/14
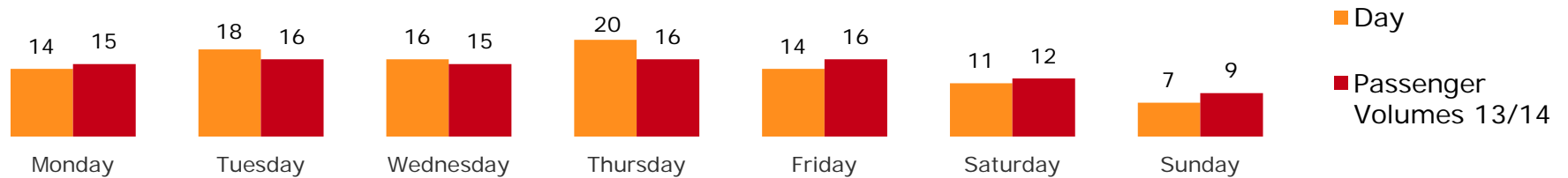
Day of the Week Travel – Night Bus Passengers
%
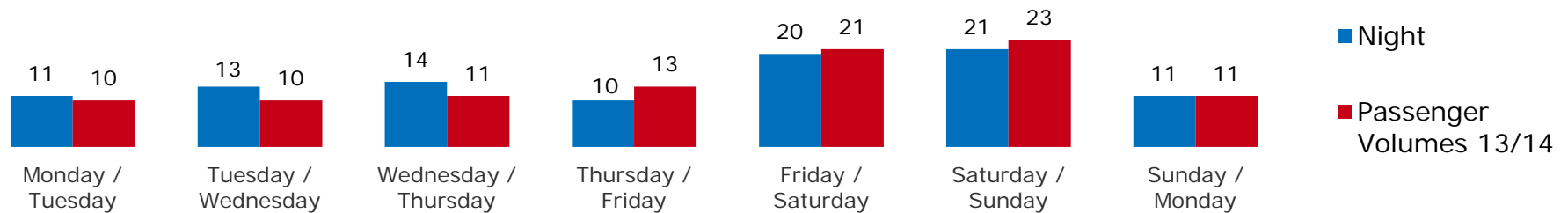
Monday / Tuesday: Night 11, Passenger Volumes 13/14 10
Tuesday / Wednesday: Night 13, Passenger Volumes 13/14 10
Wednesday / Thursday: Night 14, Passenger Volumes 13/14 11
Thursday / Friday: Night 10, Passenger Volumes 13/14 13
Friday / Saturday: Night 20, Passenger Volumes 13/14 21
Saturday / Sunday: Night 21, Passenger Volumes 13/14 23
Sunday / Monday: Night 11, Passenger Volumes 13/14 11

Legend:
- Night
- Passenger Volumes 13/14

Journey Characteristics: Shift Time Band

The chart below shows the spread of interviews across the time bands.

Shift Time Band – Day and Night Bus Passengers
%
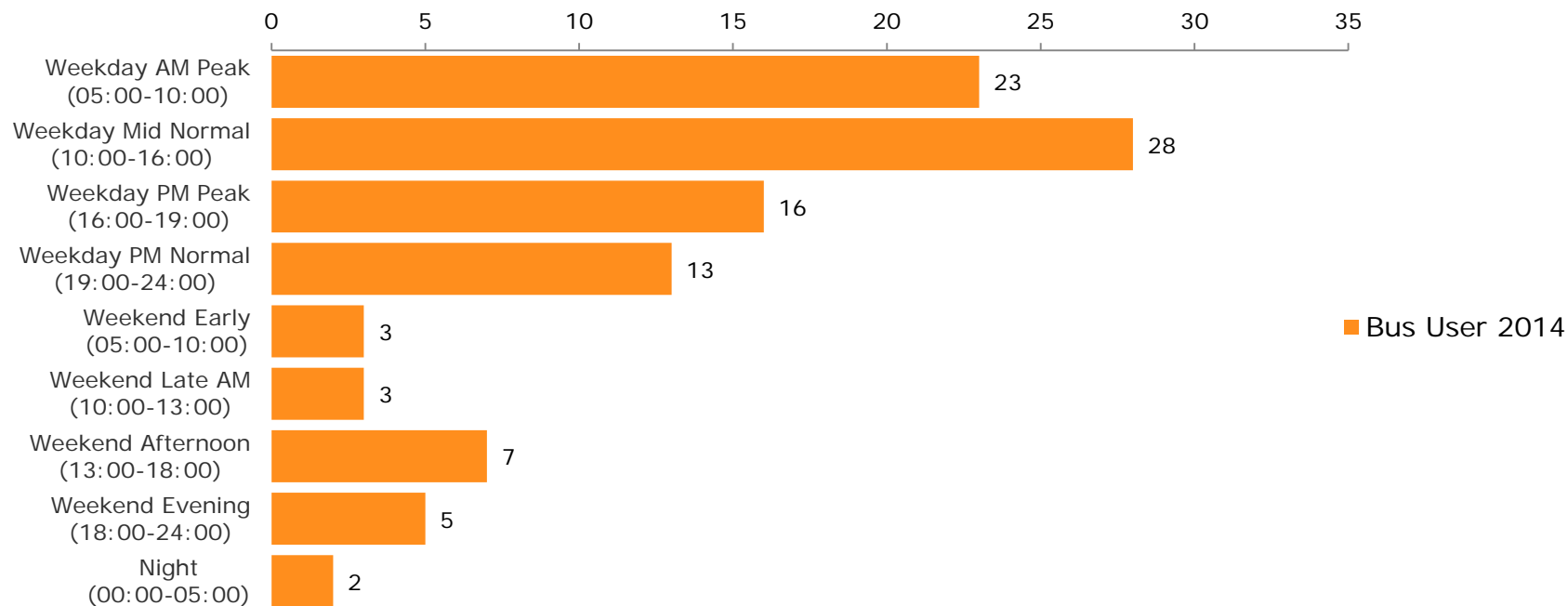
Shift Time Band	Bus User 2014
Weekday AM Peak (05:00-10:00)	23
Weekday Mid Normal (10:00-16:00)	28
Weekday PM Peak (16:00-19:00)	16
Weekday PM Normal (19:00-24:00)	13
Weekend Early (05:00-10:00)	3
Weekend Late AM (10:00-13:00)	3
Weekend Afternoon (13:00-18:00)	7
Weekend Evening (18:00-24:00)	5
Night (00:00-05:00)	2

■ Bus User 2014

Journey Characteristics: Shift Time Band Compared To Passenger Volumes

The distribution of fieldwork shifts across the time bands is in line with passenger volumes.

Shift Time Band – Day and Night Bus Passengers Compared to Passenger Volumes 2013/14 (Total Boardings)
%

Shift Time Band	Bus User 2014	Passenger Volumes 13/14
Weekday AM Peak (05:00-10:00)	23	19
Weekday Mid Normal (10:00-16:00)	28	28
Weekday PM Peak (16:00-19:00)	16	18
Weekday PM Normal (19:00-24:00)	13	12
Weekend Early (05:00-10:00)	3	3
Weekend Late AM (10:00-13:00)	3	4
Weekend Afternoon (13:00-18:00)	7	8
Weekend Evening (18:00-24:00)	5	5
Night (00:00-05:00)	2	3

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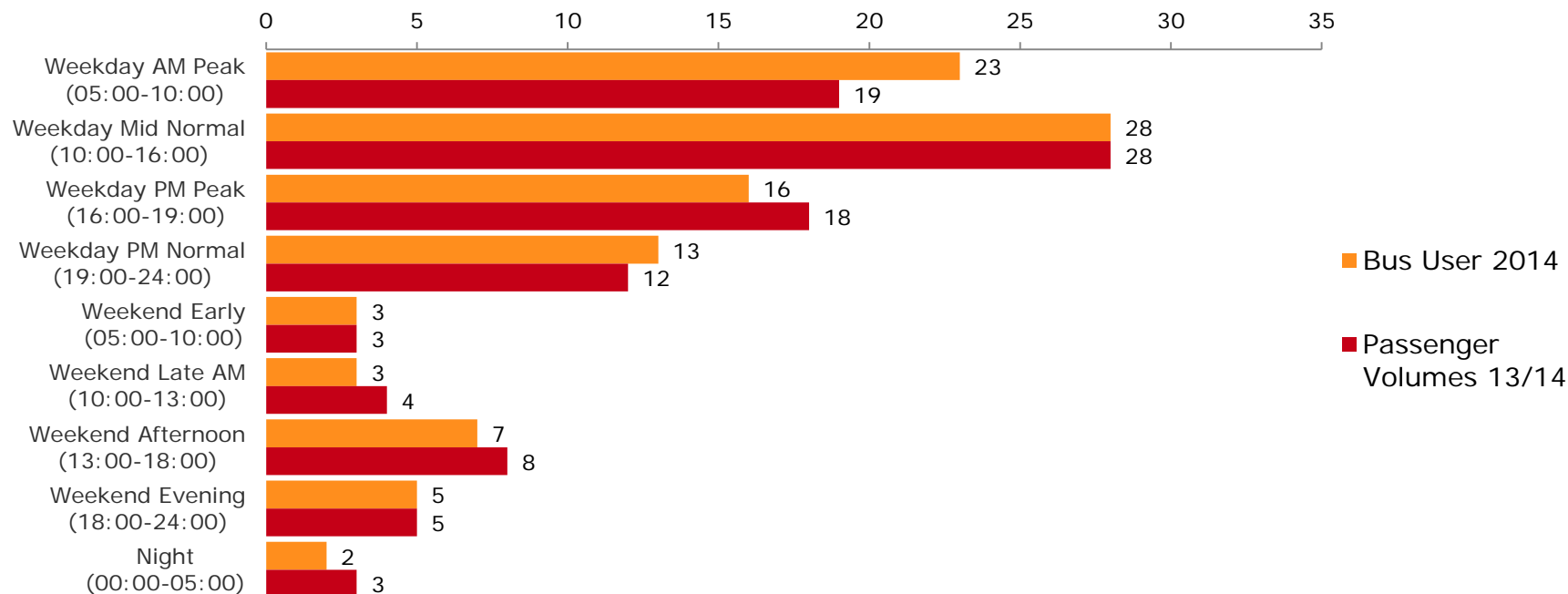
8

Appendix 2: Visitor Analysis

Overview Visitor Analysis

Definitions:

- Visitors are defined as passengers living outside of London but excluding those who commute to their regular place of work or study.

- Of visitors, domestic visitors are those who live outside of London but within the UK and international visitors are those who live overseas or abroad.

- All other passengers are defined as non-visitors.

Please note:

- Responses from under 16s have been removed throughout the report unless otherwise specified. Tables which include respondents aged under 16 can be found in the Appendix.

- Figures throughout the report may not add up to 100% due to rounding.

Contents:

- Journey Characteristics

- Travel Behaviour

- Ticket Information

Journey Characteristics: Visitors and Non-Visitors Main Purpose of Journey

Main Purpose of Journey – Day and Night Visitors and Non-visitors
%

	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
Travelling to/from work	n/a	61	n/a	59
Employer Business	5	1	3	1
To/from school/education	n/a	9	n/a	4
To/from shopping	23	8	4	1
Visiting friends/relatives	19	7	26	11
Leisure	15	7	30	16
Personal Business	4	2	2	1
Healthcare Appointment	4	2	1	-
Taking/collecting child	1	1	1	-
Picking up/dropping off someone	1	-	1	-
Holiday/Sightseeing	20	-	21	1
Other	7	2	10	4
Unweighted base	**2,126**	**31,639**	**576**	**7,612**

Q2. What is the main purpose of your journey?
Unweighted base: 33,765 Day; 8,188 Night
- Less than 0.5%

TNS

Transport for London

Journey Characteristics: Domestic and International Visitors Main Purpose of Journey

Main Purpose of Journey – Day and Night Domestic and International Visitors

%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
Travelling to/from work	n/a	n/a	n/a	n/a
Employer Business	7	1	5	-
To/from school/education	n/a	n/a	n/a	n/a
To/from shopping	28	11	5	3
Visiting friends/relatives	21	14	28	23
Leisure	16	13	35	23
Personal Business	5	3	2	1
Healthcare Appointment	5	1	1	1
Taking/collecting child	2	1	2	-
Picking up/dropping off someone	1	1	1	1
Holiday/Sightseeing	7	52	9	40
Other	8	4	11	7
Unweighted base	**1,494**	**632**	**343**	**233**

Q2. What is the main purpose of your journey?
Unweighted base: 2,126 Day; 576 Night
- Less than 0.5%

TNS

Bus User Survey 2014

Journey Characteristics: Visitors and Non-Visitors Access Mode

How Passengers Travelled to the Bus Stop – Day and Night Visitors and Non-visitors
%

	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
Walked all the way	58	64	54	62
Another bus	22	20	23	25
Underground	9	9	10	8
London Overground	3	3	2	2
Mainline train	4	2	2	1
DLR	1	-	2	-
Tramlink	1	-	1	-
Car - as driver	1	1	2	-
Car - as passenger	1	-	1	1
Motorcycle	-	-	1	-
Bicycle	-	-	1	-
Taxi	-	-	2	-
Emirates Airline	1	-	1	-
Unweighted base	**2,028**	**30,040**	**532**	**7,120**

Q8a. How did you get to the bus stop where you got on the bus?
Unweighted base: 32,068 Day; 7,652 Night
- Less than 0.5%

Bus User Survey 2014   71

Journey Characteristics: Domestic and International Visitors Access Mode

How Passengers Travelled to the Bus Stop – Day and Night Domestic and International Visitors
%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
Walked all the way	55	63	47	63
Another bus	24	17	24	21
Underground	8	11	10	10
London Overground	3	2	3	2
Mainline train	4	2	4	-
DLR	1	-	2	1
Tramlink	1	-	1	-
Car - as driver	1	1	3	-
Car - as passenger	1	-	1	-
Motorcycle	-	-	1	-
Bicycle	-	1	2	-
Taxi	-	1	2	1
Emirates Airline	-	2	1	2
Unweighted base	**1,418**	**610**	**314**	**218**

Q8a. How did you get to the bus stop where you got on the bus?
Unweighted base: 2,028 Day; 532 Night
- Less than 0.5%

Bus User Survey 2014

Journey Characteristics: Visitors and Non-Visitors Egress Mode

How Passengers Travelled after the Bus Journey – Day and Night Visitors and Non-visitors
%

	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
Walked all the way	56	61	62	70
Another bus	21	20	20	23
Underground	10	11	5	3
London Overground	4	3	1	1
Mainline train	4	3	3	1
DLR	-	1	1	-
Tramlink	-	-	-	-
Car - as driver	1	1	1	-
Car - as passenger	1	-	1	1
Motorcycle	-	-	-	-
Bicycle	-	-	1	-
Taxi	-	-	3	1
Emirates Airline	1	-	3	-
Unweighted base	**1,213**	**19,259**	**362**	**4,589**

Journey Characteristics: Domestic and International Visitors Egress Mode

How Passengers Travelled after the Bus Journey – Day and Night Domestic and International Visitors

%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
Walked all the way	57	55	61	64
Another bus	23	18	20	20
Underground	7	15	4	6
London Overground	3	4	2	1
Mainline train	5	3	2	4
DLR	-	-	1	1
Tramlink	-	-	-	-
Car - as driver	2	1	1	-
Car - as passenger	1	-	2	-
Motorcycle	-	1	1	-
Bicycle	-	-	1	1
Taxi	-	-	4	1
Emirates Airline	-	2	2	4
Unweighted base	**783**	**430**	**197**	**165**

Q8b. How will you travel onwards after you leave this bus?
Unweighted base: 1,213 Day; 362 Night
- Less than 0.5%

TNS

Travel Behaviour: Visitors and Non-Visitors Frequency of Use of the Bus Route

Frequency of Use: The Bus Route – Day and Night Visitors and Non-visitors

%

	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
5+ days a week	20	51	11	42
3-4 days a week	13	18	8	16
2 days a week	12	10	6	9
1 day a week	9	6	7	7
Once a fortnight	4	3	3	5
Once a month	6	3	8	6
Less often	35	8	57	16
Unweighted base	**1,648**	**26,542**	**444**	**6,170**

Frequency of Use: The Bus Route – Day and Night Domestic and International Visitors

%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
5+ days a week	23	13	15	6
3-4 days a week	15	9	9	6
2 days a week	14	8	5	7
1 day a week	10	6	9	4
Once a fortnight	5	2	3	2
Once a month	7	5	10	6
Less often	26	56	49	68
Unweighted base	**1,169**	**479**	**260**	**184**

TNS

Transport for London

Bus User Survey 2014

Travel Behaviour: Visitors and Non-Visitors Frequency of Use of any London Bus

Frequency of Use: Any London Bus Frequency – Day and Night Visitors and Non-visitors
%

	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
5+ days a week	27	58	23	58
3-4 days a week	15	18	12	17
2 days a week	8	10	8	10
1 day a week	6	6	3	6
Once a fortnight	4	3	4	3
Once a month	7	2	10	2
Less often	33	4	39	4
Unweighted base	**1,442**	**22,256**	**430**	**5,344**

Frequency of Use: Any London Bus Frequency – Day and Night Domestic and International Visitors
%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
5+ days a week	30	21	25	20
3-4 days a week	16	14	12	13
2 days a week	10	5	10	5
1 day a week	6	6	5	1
Once a fortnight	5	1	7	1
Once a month	9	3	11	9
Less often	24	50	30	51
Unweighted base	**969**	**473**	**245**	**185**

Q6b. In the last 3 months, how often have you used: Any London bus
Unweighted base: Visitors and Non-Visitors - 23,698 Day; 5,774 Night;
Domestic and International Visitors - 1,442 Day; 430 Night

TNS

Travel Behaviour: Visitors and Non-Visitors Frequency of Use of any London Night Bus

Frequency of Use of any London Night Bus – Day and Night Visitors and Non-visitors
%

.	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
5+ days a week	5	10	9	29
3-4 days a week	3	5	8	16
2 days a week	5	7	7	15
1 day a week	4	9	6	11
Once a fortnight	3	7	5	8
Once a month	5	11	13	7
Less often	75	51	53	13
Unweighted base	**928**	**15,005**	**372**	**4,740**

Frequency of Use of any London Night Bus – Day and Night Domestic and International Visitors
%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
5+ days a week	7	4	11	7
3-4 days a week	3	3	7	8
2 days a week	5	3	5	10
1 day a week	5	2	5	8
Once a fortnight	3	2	8	1
Once a month	7	2	15	11
Less often	70	83	50	56
Unweighted base	**585**	**343**	**204**	**168**

Q6c. In the last 3 months, how often have you used: Any London night bus
Unweighted base: Visitors and Non-Visitors - 15,933 Day; 5,112 Night;
Domestic and International Visitors - 928 Day; 372 Night

TNS

Transport for London

Travel Behaviour: Visitors and Non-Visitors Frequency of Use of Underground / DLR

Frequency of Use of Underground / DLR – Day and Night Visitors and Non-visitors

%

	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
5+ days a week	17	35	22	46
3-4 days a week	10	11	13	12
2 days a week	9	10	11	10
1 day a week	8	9	6	8
Once a fortnight	4	6	4	4
Once a month	8	8	8	5
Less often	16	9	13	6
Not used in the last three months	29	12	22	9
Unweighted base	**1,739**	**27,759**	**505**	**6,799**

Frequency of Use of Underground / DLR – Day and Night Domestic and International Visitors

%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
5+ days a week	15	19	21	24
3-4 days a week	9	12	13	12
2 days a week	10	7	13	8
1 day a week	9	6	8	4
Once a fortnight	5	2	5	4
Once a month	10	4	9	6
Less often	16	15	12	16
Not used in the last three months	26	34	19	27
Unweighted base	**1,190**	**549**	**299**	**206**

Q7a. In the last 3 months, how often have you used the following forms of transport in London: Underground / Docklands Light Railway
Unweighted base: Visitors and Non-Visitors – 29,498 Day; 7,304 Night; Domestic and International Visitors – 1,739 Day; 505 Night

TNS

Travel Behaviour: Visitors and Non-Visitors Frequency of Use of Mainline Train

Frequency of Use of Mainline Train – Day and Night Visitors and Non-visitors

%

	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
5+ days a week	11	18	13	18
3-4 days a week	6	8	4	8
2 days a week	8	8	7	8
1 day a week	8	9	8	9
Once a fortnight	6	9	6	8
Once a month	11	12	10	11
Less often	16	16	15	16
Not used in the last three months	34	20	36	22
Unweighted base	**1,347**	**19,789**	**409**	**4,682**

Frequency of Use of Mainline Train – Day and Night Domestic and International Visitors

%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
5+ days a week	13	7	15	10
3-4 days a week	7	5	5	3
2 days a week	9	4	10	4
1 day a week	8	6	9	7
Once a fortnight	7	4	8	3
Once a month	15	4	12	8
Less often	15	19	13	18
Not used in the last three months	25	51	27	48
Unweighted base	**918**	**429**	**234**	**175**

TNS

Bus User Survey 2014

Travel Behaviour: Visitors and Non-Visitors Frequency of Use of Car / Van

Frequency of Use of Car / Van – Day and Night Visitors and Non-visitors

%

	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
5+ days a week	14	12	11	9
3-4 days a week	6	9	7	5
2 days a week	5	12	5	6
1 day a week	6	9	3	6
Once a fortnight	3	5	1	4
Once a month	4	5	4	6
Less often	14	15	18	17
Not used in the last three months	48	34	52	46
Unweighted base	**1,140**	**17,717**	**375**	**4,287**

Frequency of Use of Car / Van – Day and Night Domestic and International Visitors

%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
5+ days a week	17	8	17	4
3-4 days a week	8	3	9	3
2 days a week	7	2	6	3
1 day a week	7	4	4	1
Once a fortnight	3	2	2	-
Once a month	4	2	4	2
Less often	13	16	14	22
Not used in the last three months	40	63	43	64
Unweighted base	**761**	**379**	**210**	**165**

Q7c. In the last 3 months, how often have you used the following forms of transport in London: Car / Van
Unweighted base: Visitors and Non-Visitors – 18,857 Day; 4,662 Night;
Domestic and International Visitors – 1,140 Day; 375 Night

Ticket Information: Visitors and Non-Visitors Type of Ticket

Type of Ticket – Day and Night Visitors and Non-visitors
%

	Day		Night	
	Visitors	**Non-Visitors**	**Visitors**	**Non-Visitors**
Cash Fare £2.40	3	1	2	-
Oyster PAYG	38	31	48	33
Oyster Travelcard	15	36	22	42
Oyster Bus/Tram Pass	4	11	5	11
1-day Paper Travelcard (OP)	4	-	6	1
1-day Paper Travelcard (Anytime)	3	-	5	1
Paper Travelcard (Weekly/Monthly/Annual)	2	1	2	1
16+ Zip Oyster (free travel on buses/trams)	3	6	2	4
16+ Zip Oyster (discounted travel across TfL)	-	1	-	-
Freedom Pass/60+ London Oyster/National Concessionary	22	10	3	2
Staff Pass/Nominee	1	2	-	2
Contactless Payment	1	1	1	1
Other	3	1	4	2
Unweighted base	**2,060**	**31,467**	**564**	**7,590**

Q5. What kind of ticket do you have for this journey?
Unweighted base: 33,527 Day; 8,154 Night
- Less than 0.5%

TNS

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Ticket Information: Domestic and International Visitors Type of Ticket

Type of Ticket – Day and Night Domestic and International Visitors
%

	Day		Night	
	Domestic Visitors	**International Visitors**	**Domestic Visitors**	**International Visitors**
Cash Fare £2.40	2	4	1	3
Oyster PAYG	33	48	49	47
Oyster Travelcard	12	23	16	30
Oyster Bus/Tram Pass	4	5	5	4
1-day Paper Travelcard (OP)	3	6	7	3
1-day Paper Travelcard (Anytime)	3	5	6	4
Paper Travelcard (Weekly/Monthly/Annual)	2	2	2	2
16+ Zip Oyster (free travel on buses/trams)	4	-	2	1
16+ Zip Oyster (discounted travel across TfL)	-	-	-	-
Freedom Pass/60+ London Oyster/National Concessionary	31	1	4	1
Staff Pass/Nominee	2	-	1	-
Contactless Payment	1	1	1	-
Other	2	4	5	4
Unweighted base	**1,437**	**623**	**333**	**231**

Q5. What kind of ticket do you have for this journey?
Unweighted base: 2,060 Day; 564 Night
- Less than 0.5%

TNS

Bus User Survey 2014   82

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Appendix 3: Passenger Characteristics (Including under 16s)

Overview Passenger Characteristics (Including under 16s)

Please note:

- This section analyses passenger characteristics (age only) which includes data from passengers under the age of 16.

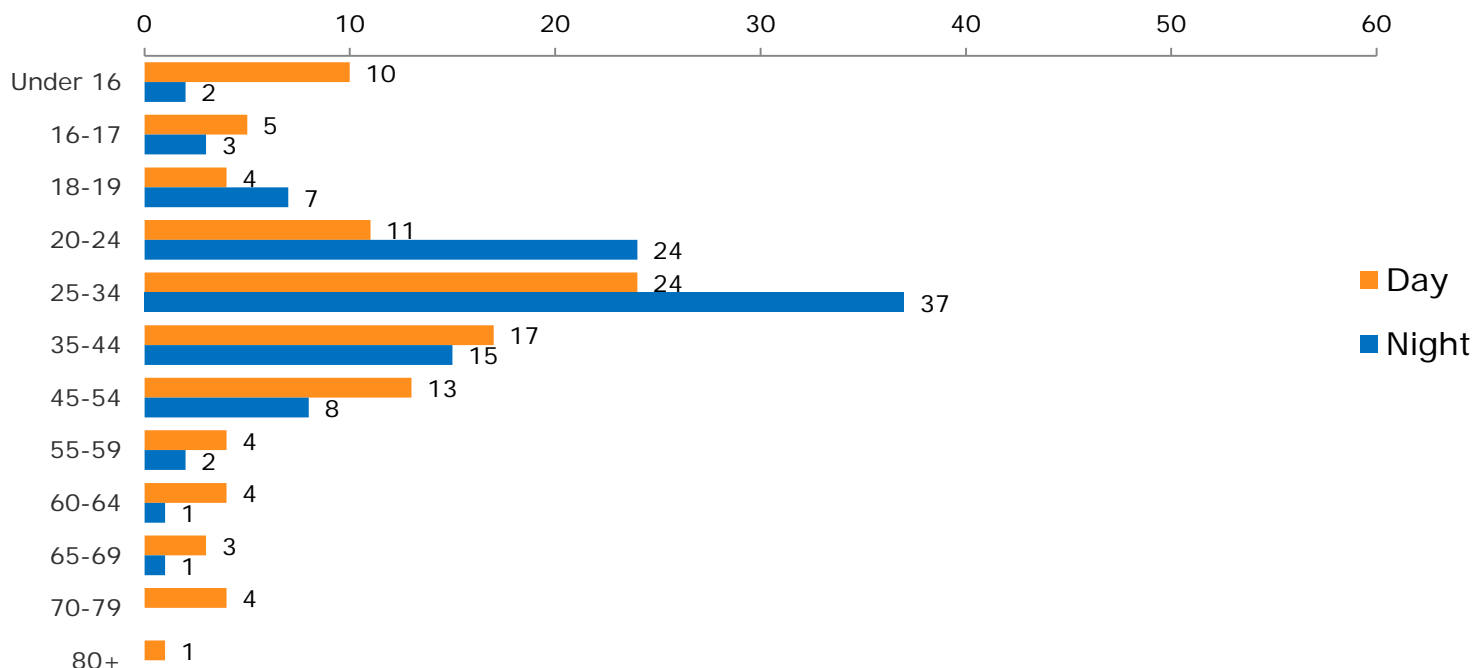- The data is not comparable to the analysis in the main body of the report.

Passenger Characteristics: Age (Including under 16s)

The full passenger profile including under 16s can be seen in the chart below. Under 16s account for 10% of day bus passengers but only 2% of night bus passengers.

Age – Day and Night Bus Passengers
(Including passengers aged under 16)
%

Age	Day	Night
Under 16	10	2
16-17	5	3
18-19	4	7
20-24	11	24
25-34	24	37
35-44	17	15
45-54	13	8
55-59	4	2
60-64	4	1
65-69	3	1
70-79	4	
80+	1	

Q1. Which age group are you in?
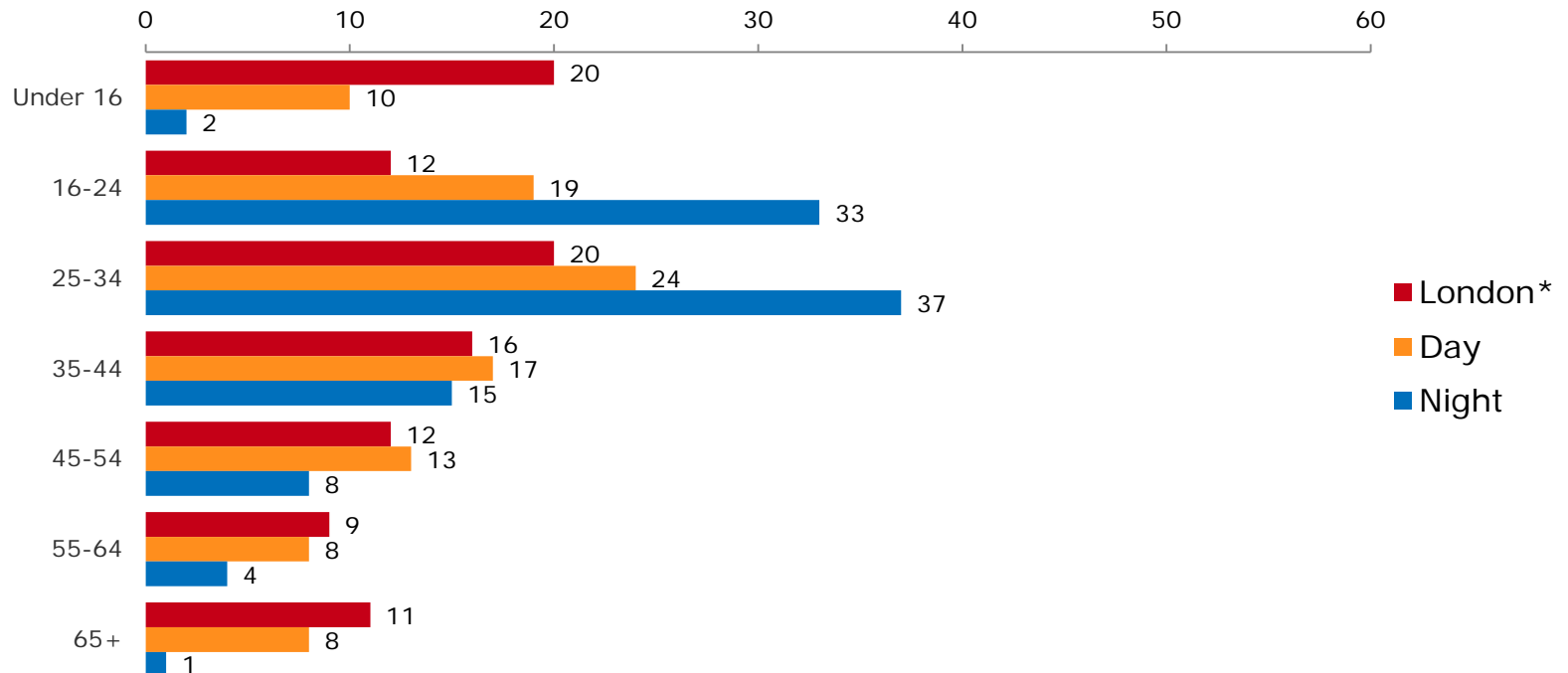Unweighted base: 42,960 Day; 9,508 Night

Passenger Characteristics: Age (Grouped, Including under 16s)

Passengers aged under 16 are under-represented among bus passengers, particularly on night bus services. When including the under 16s, the largest segment of day and night bus users is 25-34 year olds (24% and 37% respectively).

Age – Day and Night Bus Passengers
(Including passengers aged under 16)
%

Legend:
- London*
- Day
- Night

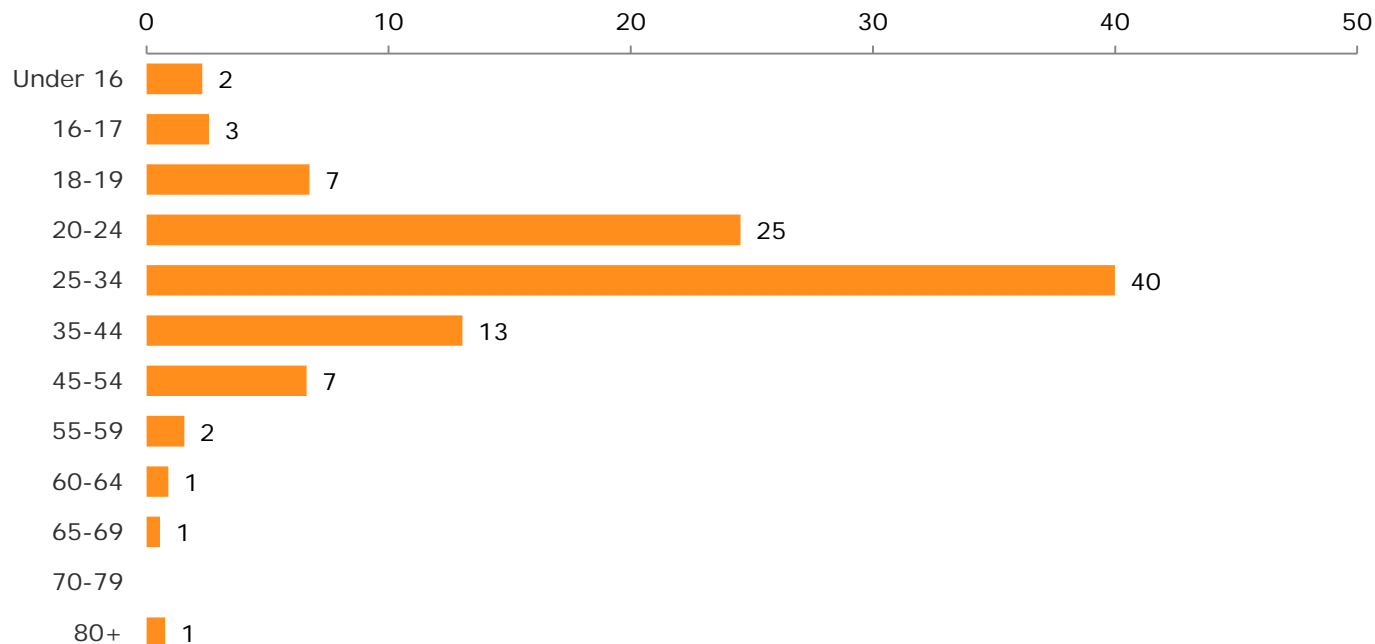| Age group	London*	Day	Night
Under 16	20	10	2
16-24	12	19	33
25-34	20	24	37
35-44	16	17	15
45-54	12	13	8
55-64	9	8	4
65+	11	8	1

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Transport for London

Weekend Night Travel Behaviour: Age (Including under 16s)

Under 16s account for only 2% of weekend night bus passengers, and so do not significantly alter the age profile. Over three quarters of weekend night bus passengers are aged between 20 and 44.

Age – Weekend Night Bus Passengers
(Friday/Saturday & Saturday/Sunday only)
(Including passengers aged under 16)
%

Age	%
Under 16	2
16-17	3
18-19	7
20-24	25
25-34	40
35-44	13
45-54	7
55-59	2
60-64	1
65-69	1
70-79	
80+	1

Unweighted base: 3,605

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Appendix 4: Comparison of the Bus User Survey 2008 and 2014

Comparison of the Bus User Survey 2008 and 2014

Please Note:

- **2014 survey does not include under 16's except to record their age. In order to provide a direct comparison with the previous Bus User Survey, under 16's have been removed from the analysis of 2008 data (except for the comparison of age)**

- New questions that were added to the 2014 are Wheelchair Usage on Journey, Baby Buggie / Pushchair / Pram Usage on Journey and Household Income.

- 2008 had open "other" responses and recodes for Journey Purpose, Employment Status, Ticket Type, Access Mode, Egress Mode, Disability, Ethnicity and Household Chief Income Earner Occupation.

- 2014 only had open "other" response for Household Chief Income Earner Occupation and therefore did not have recoding for Journey Purpose, Employment Status, Ticket Type, Access Mode, Egress Mode , Disability, Ethnicity.

Contents:

- Passenger Characteristics

- Journey Characteristics

- Travel Behaviour

- Ticket Information

Headlines

Overall the **2014 BUS** findings are **broadly consistent** with the **2008 BUS** findings.

However there are **some differences**, the main ones being:

- The **adult bus profile is older** in 2014 (fewer 16-34, more over 35's)

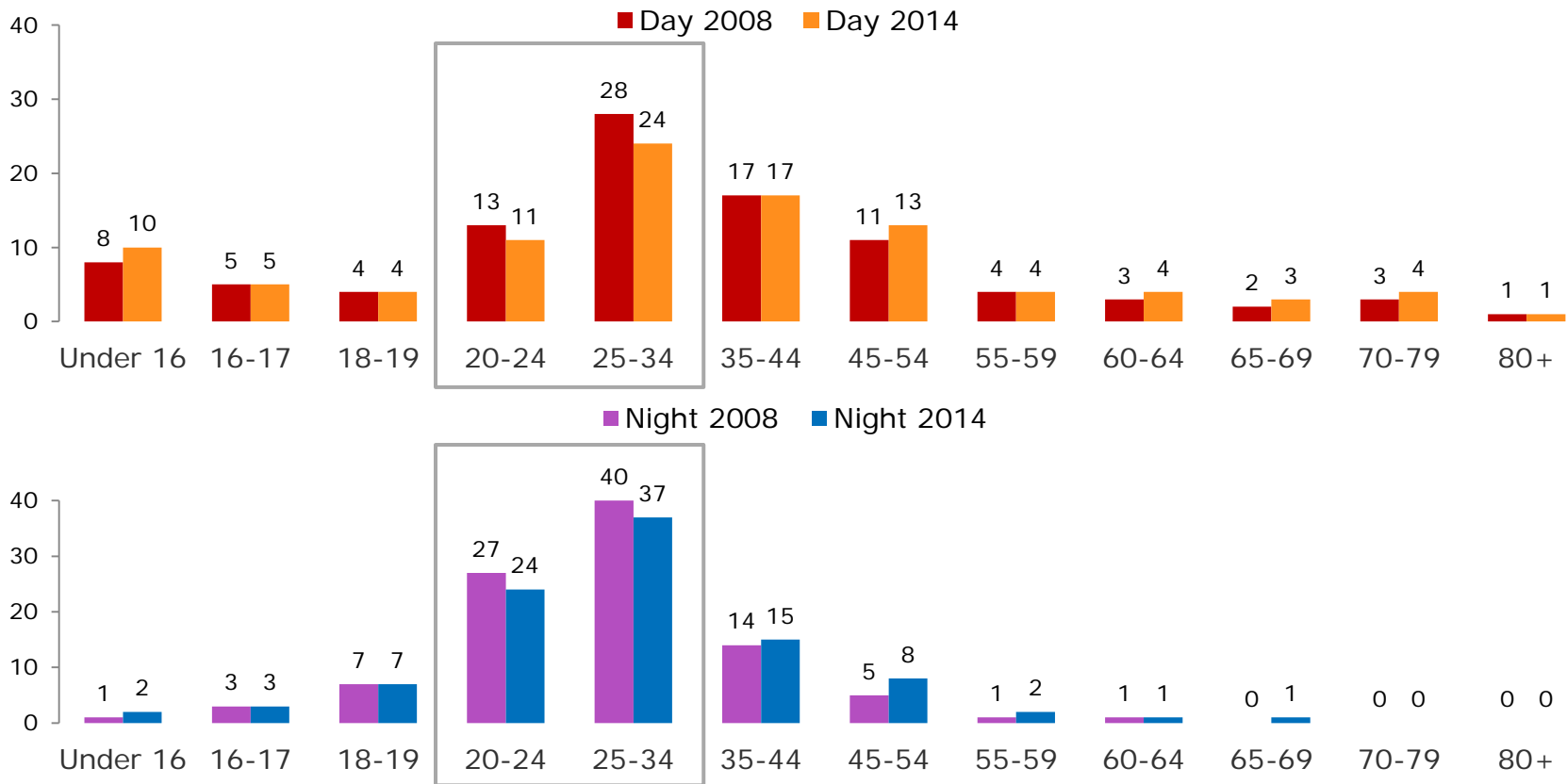- The proportion of journeys using **Oyster Travelcard** and **Oyster PAYG increased** in 2014

More minor differences include:

- Women still outnumber men on day bus and men still outnumber woman on night bus, but the proportion of women has increased on both day and night buses.

- There are fewer passengers from mixed ethnic groups and more from black ethnic groups

- The vast majority of bus passengers are still Londoners but the proportion of non-Londoners has increased slightly

- The proportion of disabled users has slightly increased

- There is a slight decrease in access to car/van for journey

The age profile of adult bus passengers has got **older** (fewer 16-34, more over 35's). The proportion of under 16s has also increased.

Age
%

Day 2008 / Day 2014 bar chart:

Age	Day 2008	Day 2014
Under 16	8	10
16-17	5	5
18-19	4	4
20-24	13	11
25-34	28	24
35-44	17	17
45-54	11	13
55-59	4	4
60-64	3	4
65-69	2	3
70-79	3	4
80+	1	1

Night 2008 / Night 2014 bar chart:

Age	Night 2008	Night 2014
Under 16	1	2
16-17	3	3
18-19	7	7
20-24	27	24
25-34	40	37
35-44	14	15
45-54	5	8
55-59	1	2
60-64	1	1
65-69	0	1
70-79	0	0
80+	0	0

TNS

Transport for London

Bus User Profile & Satisfaction in 2014

The proportion of **women** has **increased** on both day and night buses.

Gender
%

Day charts:

	Male	Female
Day 2008	46	54
Day 2014	43	57

Night charts:

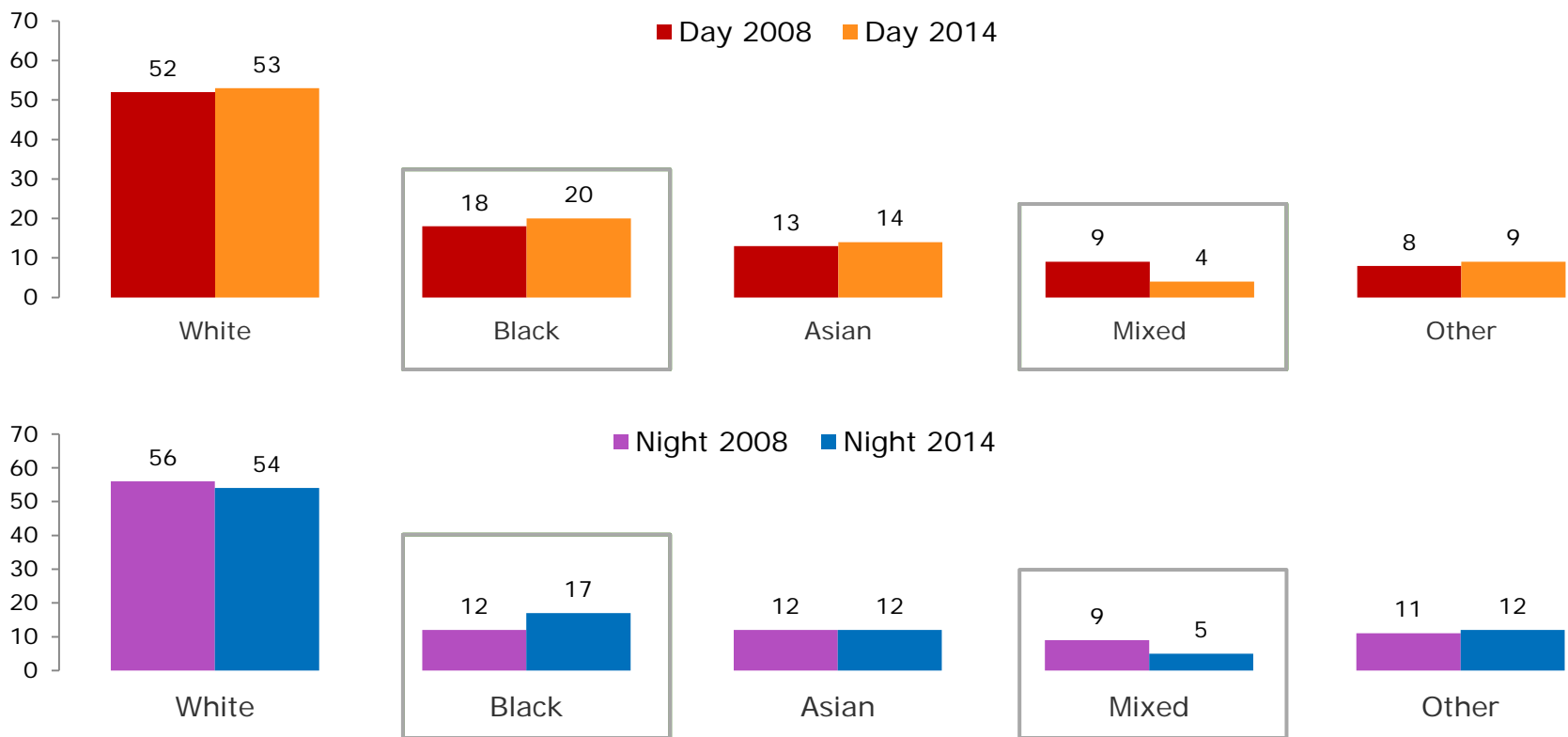|	Male	Female
Night 2008	66	34
Night 2014	64	36

Bus User Profile & Satisfaction in 2014
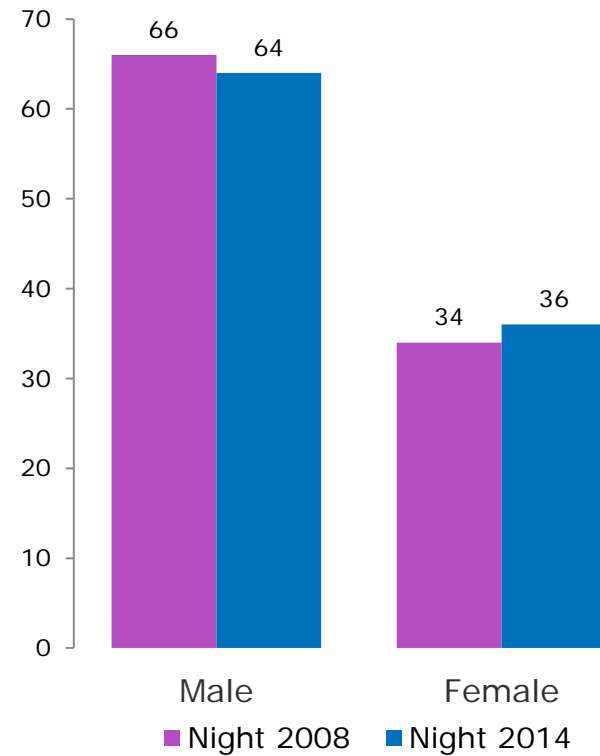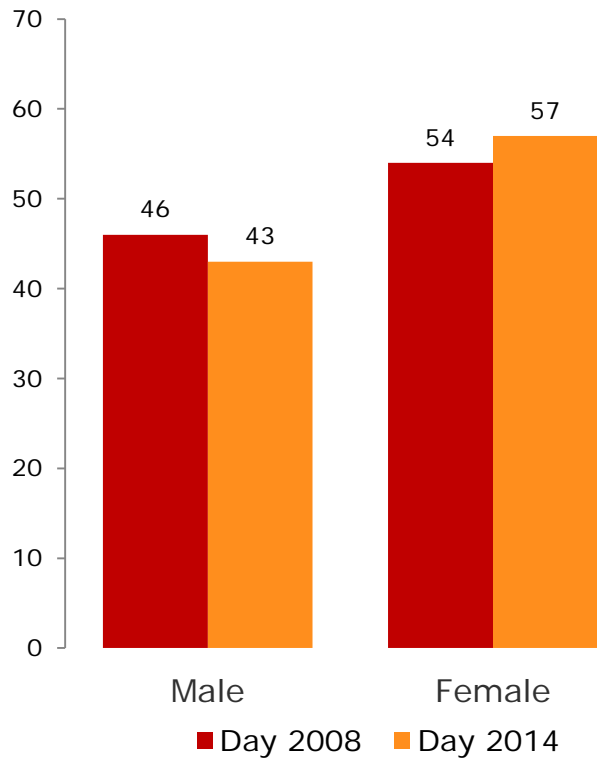
Ethnicity is broadly similar between 2008 and 2014, although there are **fewer** people from **mixed** ethnic groups and **more** from **black** ethnic groups.

Ethnicity (Grouped)
%

Legend: ■ Day 2008 ■ Day 2014

	White	Black	Asian	Mixed	Other
Day 2008	52	18	13	9	8
Day 2014	53	20	14	4	9

Legend: ■ Night 2008 ■ Night 2014

	White	Black	Asian	Mixed	Other
Night 2008	56	12	12	9	11
Night 2014	54	17	12	5	12

TNS

Transport for London

Bus User Profile & Satisfaction in 2014

The proportion of **non-Londoners** has **increased** slightly.

Residence
%

■ Day 2008 ■ Day 2014

Residence	Day 2008	Day 2014
In London (within M25)	89	86
Outside M25 but within the South East	6	9
Elsewhere in the UK	3	2
Overseas/Abroad	2	3

■ Night 2008 ■ Night 2014

Residence	Night 2008	Night 2014
In London (within M25)	88	87
Outside M25 but within the South East	5	6
Elsewhere in the UK	3	3
Overseas/Abroad	4	4
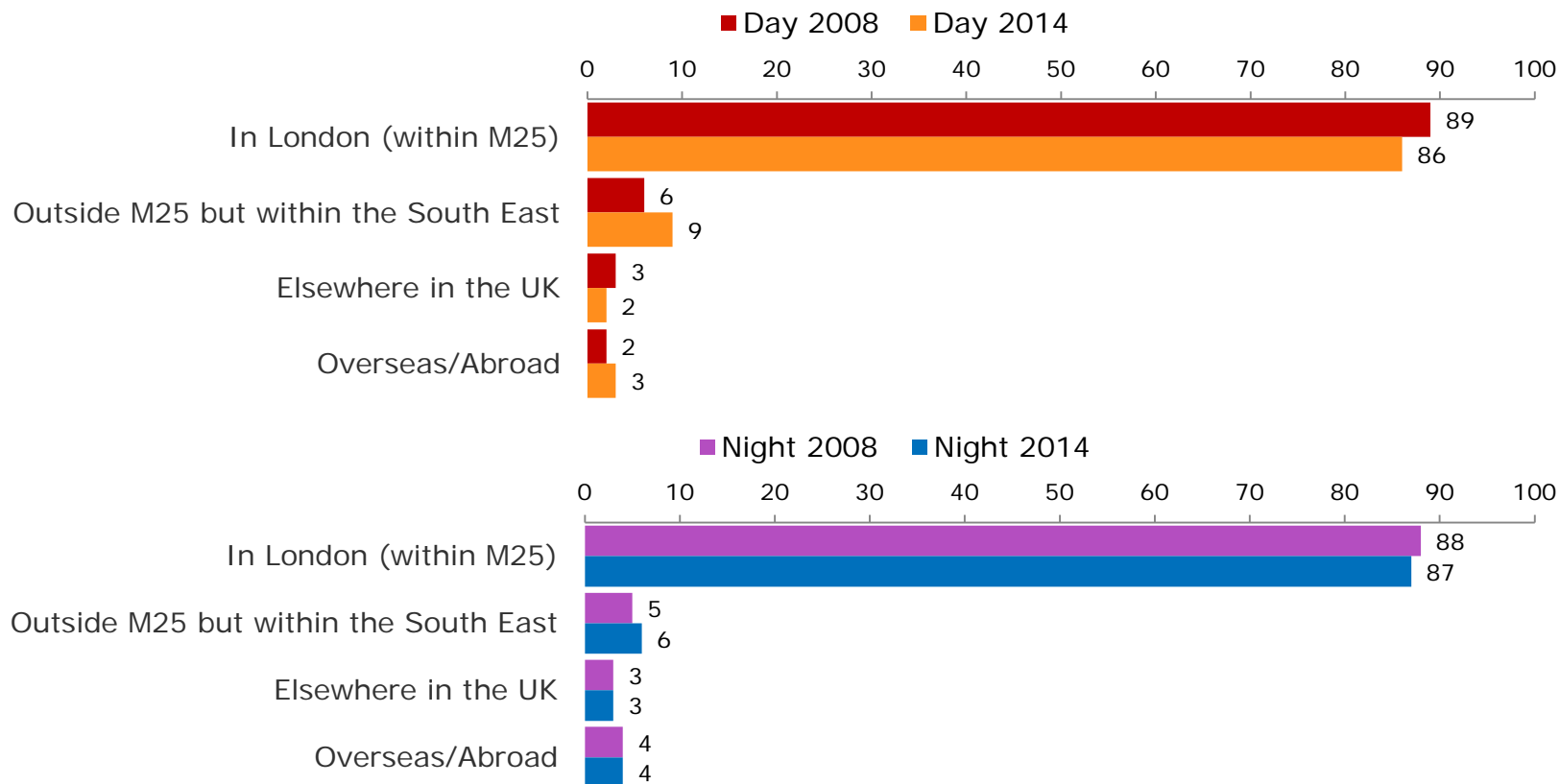
Q10. Where do you live?
Unweighted base: 29,886 Day 2014; 37,119 Day 2008; 7,270 Night 2014; 7,369 Night 2008

TNS

Transport for London

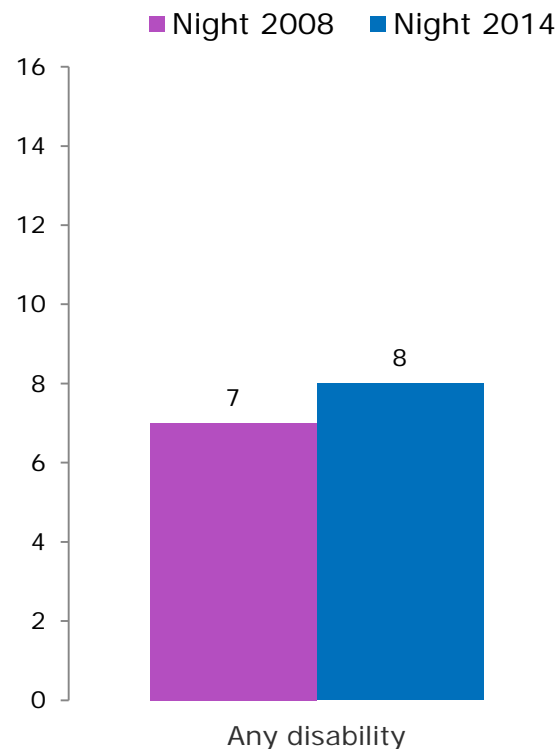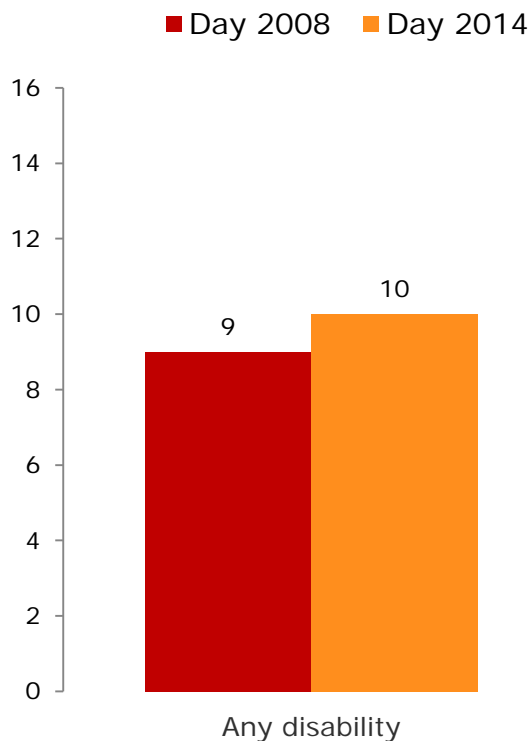Bus User Profile & Satisfaction in 2014   94

Employment status has remained **fairly consistent** for **day** bus passengers, while **night** bus passengers have seen an **increase** in **workers** and a **decrease** in **students**.

Employment Status

%

■ Day 2008　■ Day 2014

	Working	Retired	Student	Unemployed	Looking after home/family	Other
Day 2008	67	8	15	6	3	2
Day 2014	67	9	13	6	3	3

■ Night 2008　■ Night 2014

	Working	Retired	Student	Unemployed	Looking after home/family	Other
Night 2008	70	1	21	6	1	2
Night 2014	74	1	16	5	1	3

TNS

Bus User Profile & Satisfaction in 2014
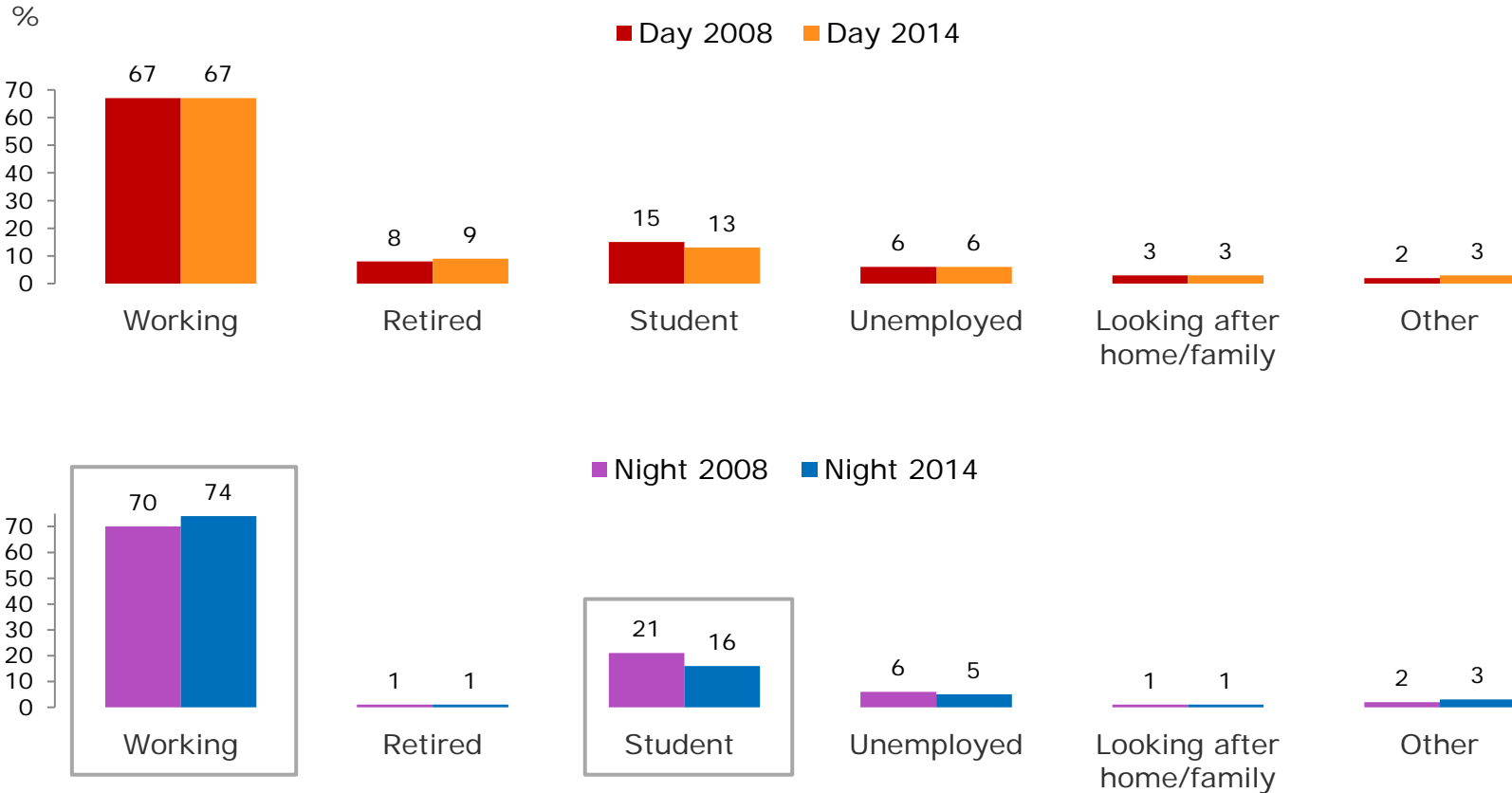
The proportion of bus passengers with a **disability** has **increased** slightly.

Disabilities %

Legend: ■ Day 2008 ■ Day 2014

Day 2008: 9
Day 2014: 10
Any disability

Legend: ■ Night 2008 ■ Night 2014

Night 2008: 7
Night 2014: 8
Any disability

Bus User Profile & Satisfaction in 2014

Bus passengers main journey purpose is broadly in line with 2008, with some small differences (fewer travelling to/from work during the day, more at night; fewer leisure travellers at night).

Main Purpose of Journey
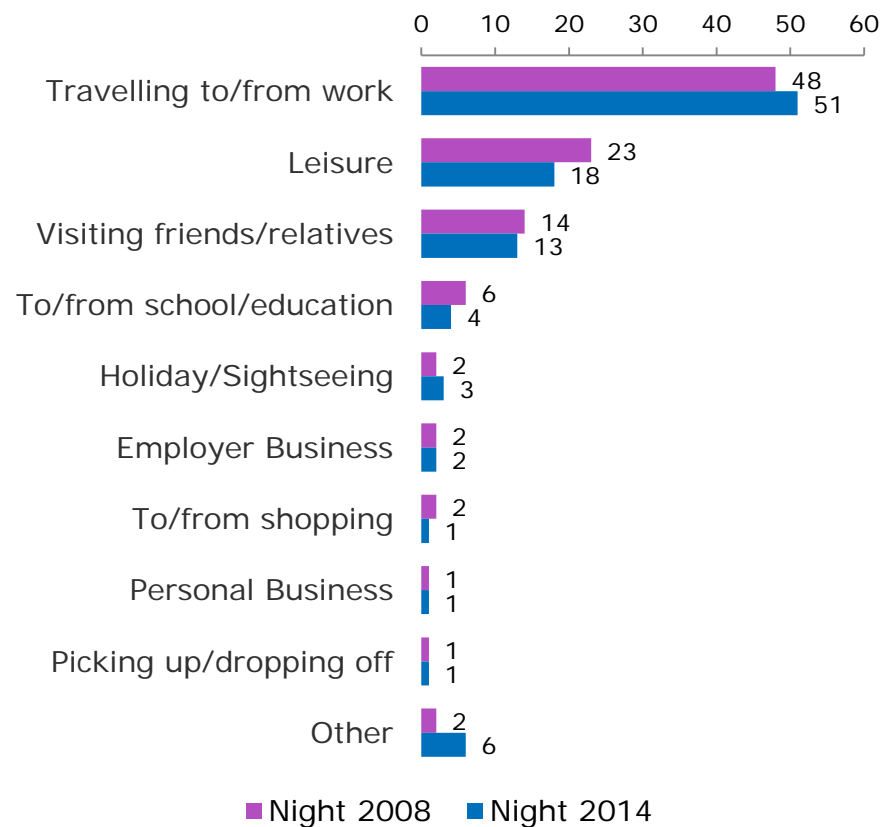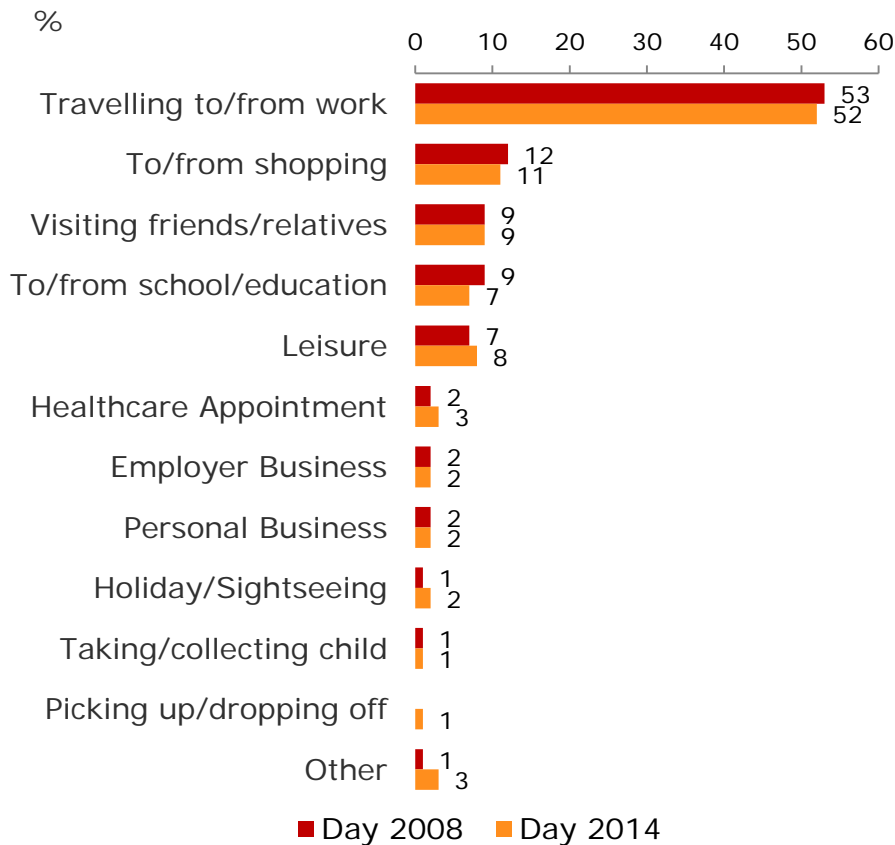
%

Day chart (Day 2008 / Day 2014):

Purpose	Day 2008	Day 2014
Travelling to/from work	53	52
To/from shopping	12	11
Visiting friends/relatives	9	9
To/from school/education	9	7
Leisure	7	8
Healthcare Appointment	2	3
Employer Business	2	2
Personal Business	2	2
Holiday/Sightseeing	1	2
Taking/collecting child	1	1
Picking up/dropping off		1
Other	1	3

Night chart (Night 2008 / Night 2014):

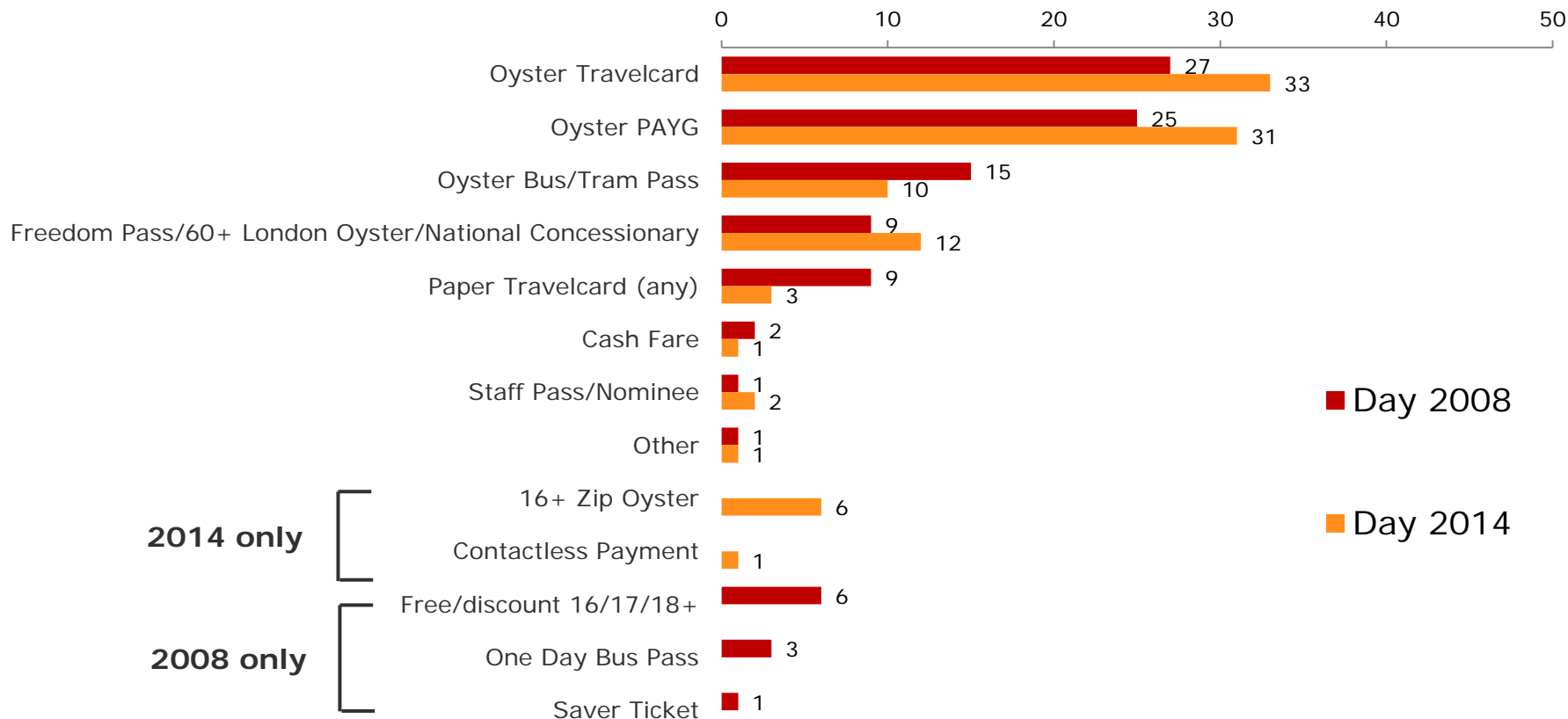| Purpose	Night 2008	Night 2014
Travelling to/from work	48	51
Leisure	23	18
Visiting friends/relatives	14	13
To/from school/education	6	4
Holiday/Sightseeing	2	3
Employer Business	2	2
To/from shopping	2	1
Personal Business	1	1
Picking up/dropping off	1	1
Other	2	6

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Transport for London

Bus User Profile & Satisfaction in 2014

For day bus, **Oyster Travelcard** and **PAYG** were more common ticket types in 2014.

Type of Ticket – Day Bus Passengers
%

Day 2008

Day 2014

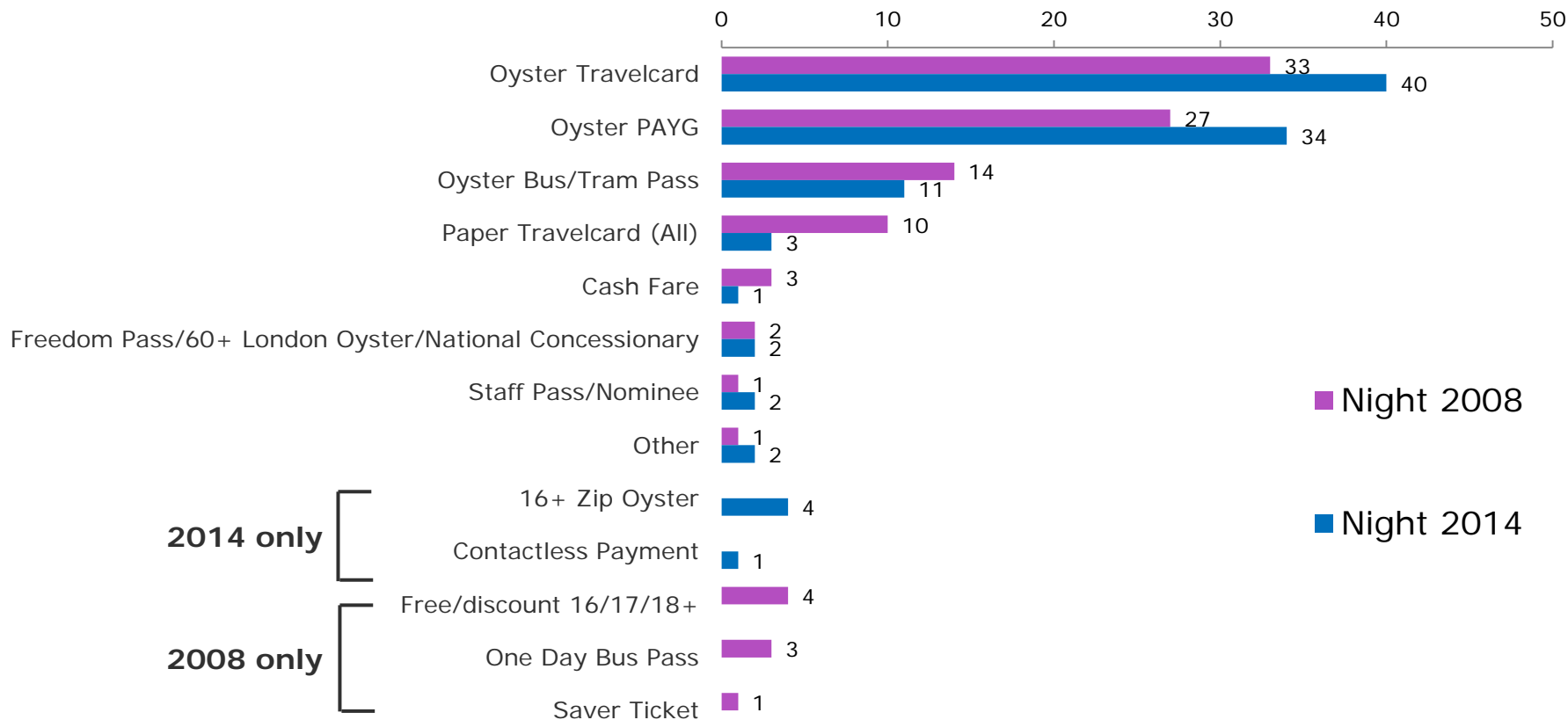| Ticket Type	Day 2008	Day 2014
Oyster Travelcard	27	33
Oyster PAYG	25	31
Oyster Bus/Tram Pass	15	10
Freedom Pass/60+ London Oyster/National Concessionary	9	12
Paper Travelcard (any)	9	3
Cash Fare	2	1
Staff Pass/Nominee	1	2
Other	1	1
16+ Zip Oyster (2014 only)		6
Contactless Payment (2014 only)		1
Free/discount 16/17/18+ (2008 only)	6	
One Day Bus Pass (2008 only)	3	
Saver Ticket (2008 only)	1	

Bus User Profile & Satisfaction in 2014

Similarly to day buses, **Oyster Travelcard** and **PAYG** were far more common ticket types on night buses in 2014.

Type of Ticket – Night Bus Passengers
%

Ticket Type	Night 2008	Night 2014
Oyster Travelcard	33	40
Oyster PAYG	27	34
Oyster Bus/Tram Pass	14	11
Paper Travelcard (All)	10	3
Cash Fare	3	1
Freedom Pass/60+ London Oyster/National Concessionary	2	2
Staff Pass/Nominee	1	2
Other	1	2
16+ Zip Oyster (2014 only)		4
Contactless Payment (2014 only)		1
Free/discount 16/17/18+ (2008 only)	4	
One Day Bus Pass (2008 only)	3	
Saver Ticket (2008 only)	1	

TNS

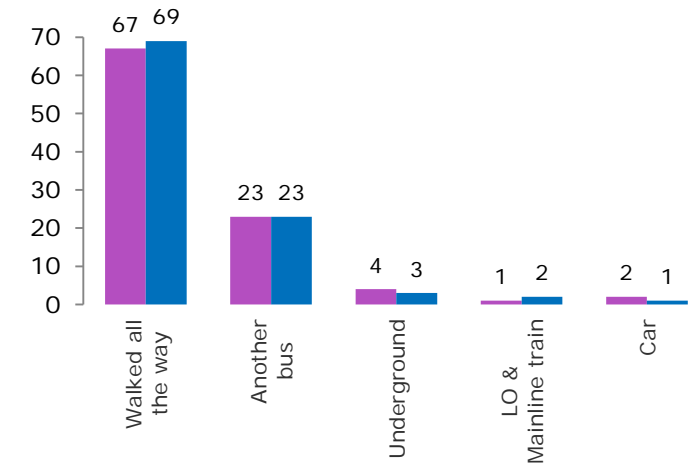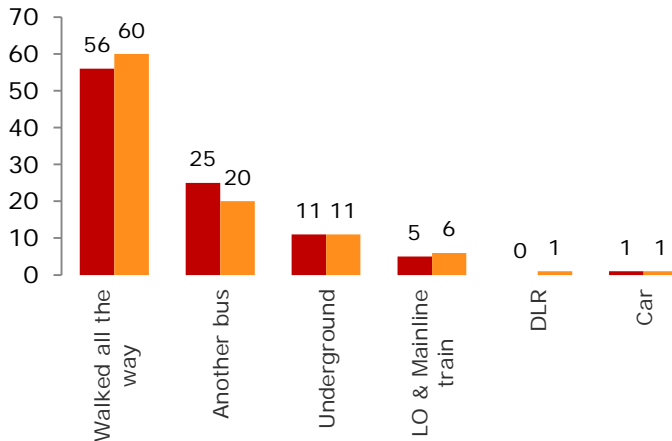**BUSES** **Transport for London**

Bus User Profile & Satisfaction in 2014

99

Walked all the way was still the most dominant access and egress mode in 2014, followed by another bus.

How Passengers Travelled to the Bus Stop %

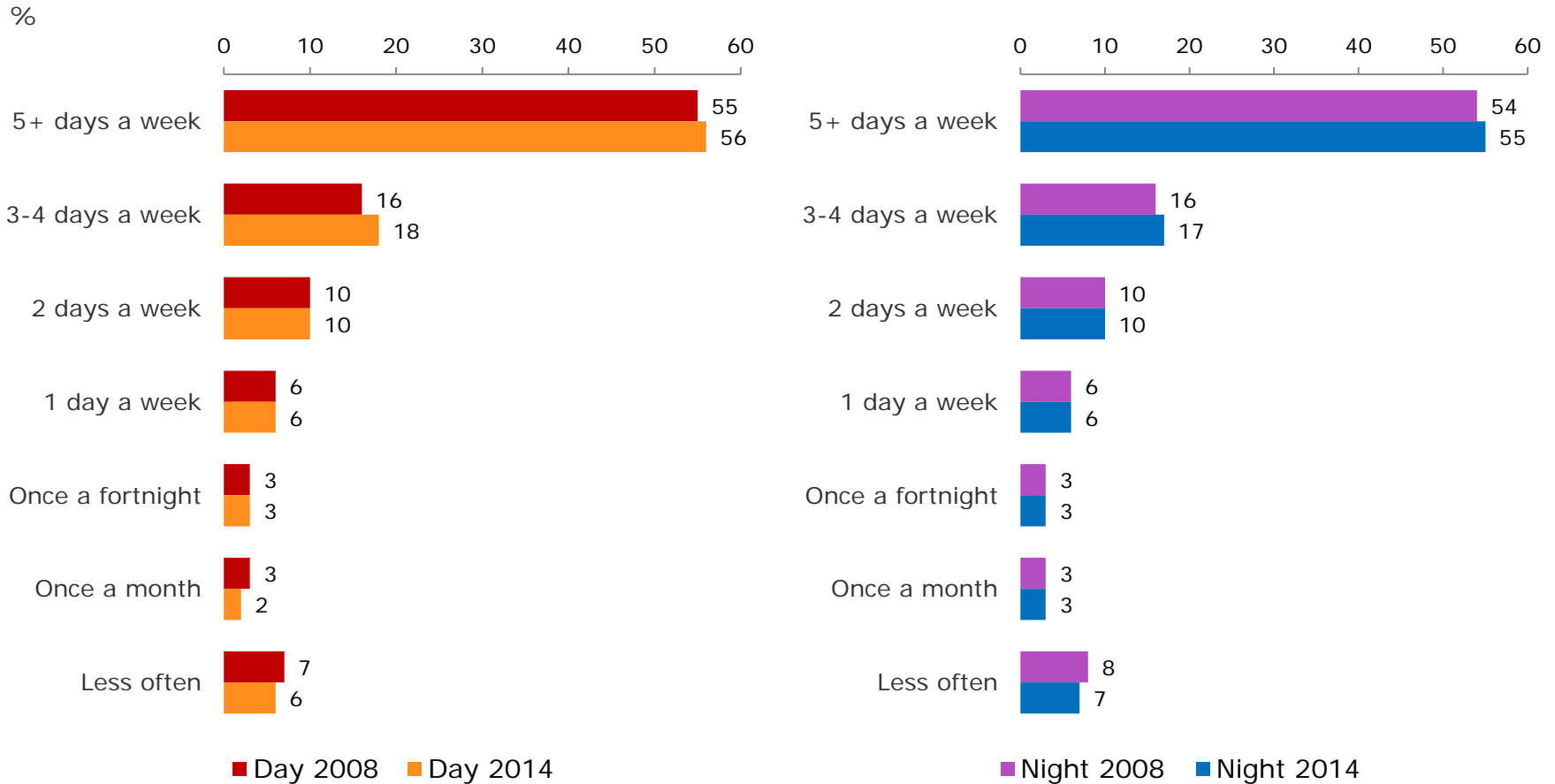**How Passengers Travelled after the Bus Journey** %

Legend: Day 2008, Day 2014, 2008 Night, 2014 Night

How Passengers Travelled to the Bus Stop (Day):
- Walked all the way: 64, 63
- Another bus: 21, 21
- Underground: 9, 9
- LO & Mainline train: 3, 5
- Car: 1, 1

How Passengers Travelled to the Bus Stop (Night):
- Walked all the way: 65, 61
- Another bus: 21, 25
- Underground: 9, 8
- LO & Mainline train: 2, 3
- DLR: 1, 0
- Car: 1, 1

How Passengers Travelled after the Bus Journey (Day):
- Walked all the way: 56, 60
- Another bus: 25, 20
- Underground: 11, 11
- LO & Mainline train: 5, 6
- DLR: 0, 1
- Car: 1, 1

How Passengers Travelled after the Bus Journey (Night):
- Walked all the way: 67, 69
- Another bus: 23, 23
- Underground: 4, 3
- LO & Mainline train: 1, 2
- Car: 2, 1

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Transport for London

Bus User Profile & Satisfaction in 2014

100

Usage of any London bus is **fairly consistent** with 2008.

Frequency of Use: Any London Bus Frequency

%

Frequency	Day 2008	Day 2014	Night 2008	Night 2014
5+ days a week	55	56	54	55
3-4 days a week	16	18	16	17
2 days a week	10	10	10	10
1 day a week	6	6	6	6
Once a fortnight	3	3	3	3
Once a month	3	2	3	3
Less often	7	6	8	7

■ Day 2008 ■ Day 2014   ■ Night 2008 ■ Night 2014

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Transport for London

Access to a car for the journey has **decreased** slightly in 2014.

Access to a Car for the Journey
%

Legend (left chart): ■ Day 2008   ■ Day 2014

Access to Car: Day 2008 = 23, Day 2014 = 21

Legend (right chart): ■ Night 2008   ■ Night 2014

Access to car: Night 2008 = 17, Night 2014 = 13
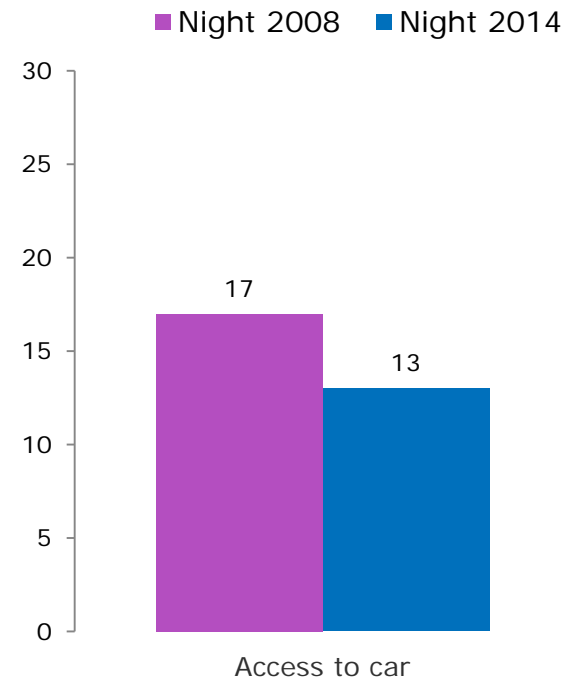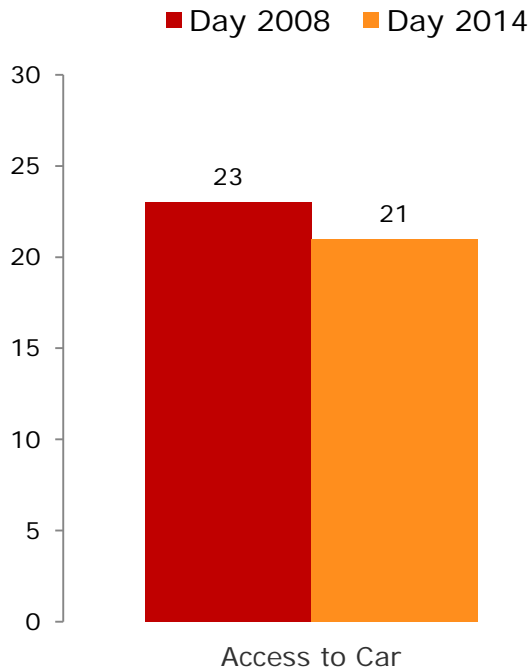
"Car use has declined year-on-year for a decade" Travel in London Report 7
Car driver estimated daily average number of journey stages: 6.3m (2008); 6.0m (2013)

Q9. Did you have access to a car which you could have used for this journey today?
Unweighted base: 31,219 Day 2014; 36,051 Day 2008; 7,575 Night 2014; 7,193 Night 2008

Bus User Profile & Satisfaction in 2014   102

Comparison of the Bus User Survey 2008 and 2014 Passenger Characteristics: Occupation of Household Chief Income Earner

Occupation of Household Chief Income Earner – Day and Night Passengers
%

	2008 Bus User Survey		2014 Bus User Survey		%pts change 2008 to 2014	
	Day	**Night**	**Day**	**Night**	**Day**	**Night**
High managerial	16%	15%	17%	15%	1%	0%
Intermediate managerial	20%	17%	22%	17%	2%	0%
Supervisor, clerical	22%	22%	21%	23%	-1%	1%
Skilled, manual worker	11%	10%	11%	12%	0%	2%
Semi-skilled or unskilled manual worker	8%	8%	8%	10%	0%	2%
Student/full time education	9%	15%	8%	12%	-1%	-3%
Unemployed	6%	4%	8%	6%	2%	2%
Other	9%	8%	5%	5%	-4%	-3%
Househusband/Housewife	-	-	0%	0%	n/a	n/a
Unweighted base	**32,802**	**6,674**	**27,925**	**6,875**		

Please note: Househusband/Housewife not listed in 2008

Q16. Which of the following best describes the occupation of the chief income earner in your household?
Please note: Under 16's were not asked this question in 2014. In order to provide a direct comparison with the previous Bus User Survey, under 16's have been removed from the analysis of 2008 data.

Comparison of the Bus User Survey 2008 and 2014
Travel Behaviour: Frequency of Use of the Bus Route

Frequency of Use: The Bus Route – Day and Night Bus Passengers 2008 and 2014
%

	2008 Bus User Survey		2014 Bus User Survey		%pts change 2008 to 2014	
	Day	**Night**	**Day**	**Night**	**Day**	**Night**
5+ days a week	52%	41%	49%	40%	-3%	-1%
3-4 days a week	17%	15%	18%	15%	1%	0%
2 days a week	9%	10%	10%	9%	1%	-1%
1 day a week	6%	8%	7%	7%	1%	-1%
Once a fortnight	3%	5%	3%	5%	0%	0%
Once a month	3%	6%	3%	6%	0%	0%
Less often	9%	16%	10%	19%	1%	3%
Unweighted base	**35,146**	**6,774**	**30,918**	**7,147**		

Q6a. In the last 3 months, how often have you used: This bus route
Please note: Under 16's were not asked this question in 2014. In order to provide a direct comparison with the previous Bus User Survey, under 16's have been removed from the analysis of 2008 data.

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Transport for London

Bus User Survey 2014   104

Comparison of the Bus User Survey 2008 and 2014
Travel Behaviour: Frequency of Use of Any London Night Bus

Frequency of Use: Any London Night Bus Frequency – Day and Night Bus Passengers 2008 and 2014

%

	2008 Bus User Survey		2014 Bus User Survey		%pts change 2008 to 2014	
	Day	**Night**	**Day**	**Night**	**Day**	**Night**
5+ days a week	10%	25%	10%	28%	0%	3%
3-4 days a week	5%	16%	5%	15%	0%	-1%
2 days a week	9%	15%	7%	14%	-2%	-1%
1 day a week	10%	12%	9%	11%	-1%	-1%
Once a fortnight	7%	8%	7%	8%	0%	0%
Once a month	10%	7%	10%	8%	0%	1%
Less often	49%	16%	52%	16%	3%	0%
Unweighted base	**17,321**	**4,851**	**16,766**	**5,442**		

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Transport for London

Comparison of the Bus User Survey 2008 and 2014
Travel Behaviour: Frequency of Use of Underground / Docklands Light Railway

Please note: Under 16's were not asked this question in 2014. In order to provide a direct comparison with the previous Bus User Survey, under 16's have been removed from the analysis of 2008 data.

Usage of Other Transport Links: Underground / Docklands Light Railway – Day and Night Bus Passengers 2008 and 2014

%

	2008 Bus User Survey		2014 Bus User Survey		%pts change 2008 to 2014	
	Day	**Night**	**Day**	**Night**	**Day**	**Night**
5+ days a week	33%	44%	33%	44%	0%	0%
3-4 days a week	11%	12%	11%	13%	0%	1%
2 days a week	10%	10%	10%	10%	0%	0%
1 day a week	10%	9%	9%	8%	-1%	-1%
Once a fortnight	6%	5%	6%	4%	0%	-1%
Once a month	7%	5%	8%	5%	1%	0%
Less often	10%	7%	10%	7%	0%	0%
Not used in the last three months	13%	8%	14%	10%	1%	2%
Unweighted base	**32,636**	**6,817**	**32,121**	**7,854**		

Comparison of the Bus User Survey 2008 and 2014
Travel Behaviour: Frequency of Use of Mainline Train

Usage of Other Transport Links: Mainline train – Day and Night Bus Passengers 2008 and 2014
%

	2008 Bus User Survey		2014 Bus User Survey		%pts change 2008 to 2014	
	Day	**Night**	**Day**	**Night**	**Day**	**Night**
5+ days a week	19%	17%	18%	18%	-1%	1%
3-4 days a week	7%	7%	7%	7%	0%	0%
2 days a week	7%	7%	8%	8%	1%	1%
1 day a week	8%	8%	9%	9%	1%	1%
Once a fortnight	8%	6%	8%	7%	0%	1%
Once a month	11%	12%	12%	11%	1%	-1%
Less often	17%	18%	16%	16%	-1%	-2%
Not used in the last three months	24%	26%	21%	23%	-3%	-3%
Unweighted base	**22,497**	**4,719**	**22,388**	**5,389**		

Q7b. In the last 3 months, how often have you used the following forms of transport in London? Mainline train
Please note: Under 16's were not asked this question in 2014. In order to provide a direct comparison with the previous
Bus User Survey, under 16's have been removed from the analysis of 2008 data.

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Transport for London

Bus User Survey 2014

Comparison of the Bus User Survey 2008 and 2014
Travel Behaviour: Frequency of Use of Car / Van

Usage of Other Transport Links: Car / Van – Day and Night Bus Passengers 2008 and 2014
%

	2008 Bus User Survey		2014 Bus User Survey		%pts change 2008 to 2014	
	Day	**Night**	**Day**	**Night**	**Day**	**Night**
5+ days a week	13%	10%	12%	9%	-1%	-1%
3-4 days a week	9%	6%	8%	5%	-1%	-1%
2 days a week	12%	7%	11%	6%	-1%	-1%
1 day a week	10%	7%	9%	6%	-1%	-1%
Once a fortnight	5%	4%	5%	4%	0%	0%
Once a month	4%	6%	5%	6%	1%	0%
Less often	14%	16%	15%	17%	1%	1%
Not used in the last three months	34%	45%	35%	46%	1%	1%
Unweighted base	**20,270**	**4,352**	**19,821**	**4,916**		

Q7c. In the last 3 months, how often have you used the following forms of transport in London? Car / Van
Please note: Under 16's were not asked this question in 2014. In order to provide a direct comparison with the previous Bus User Survey, under 16's have been removed from this analysis of 2008 data.