



INTERNATIONAL BUS BENCHMARKING GROUP

The Performance of London Buses Compared to Other World Cities

Presentation to TfL's Independent Investment
Programme Advisory Group

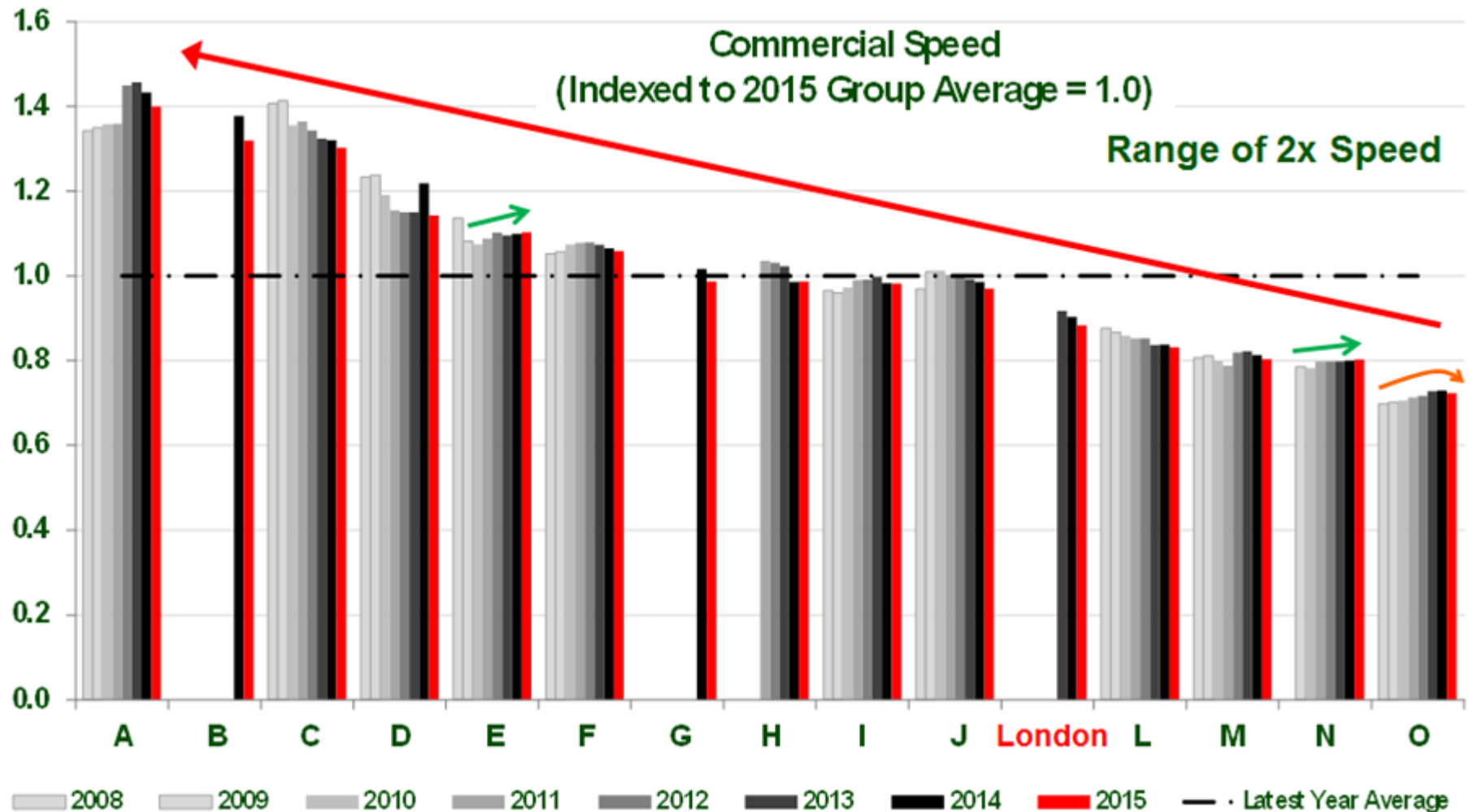
Imperial College
London

Fourteen Bus Benchmarking Group Member Cities, Fifteen Members Seven Operators in the IBBG for 13 Years Now



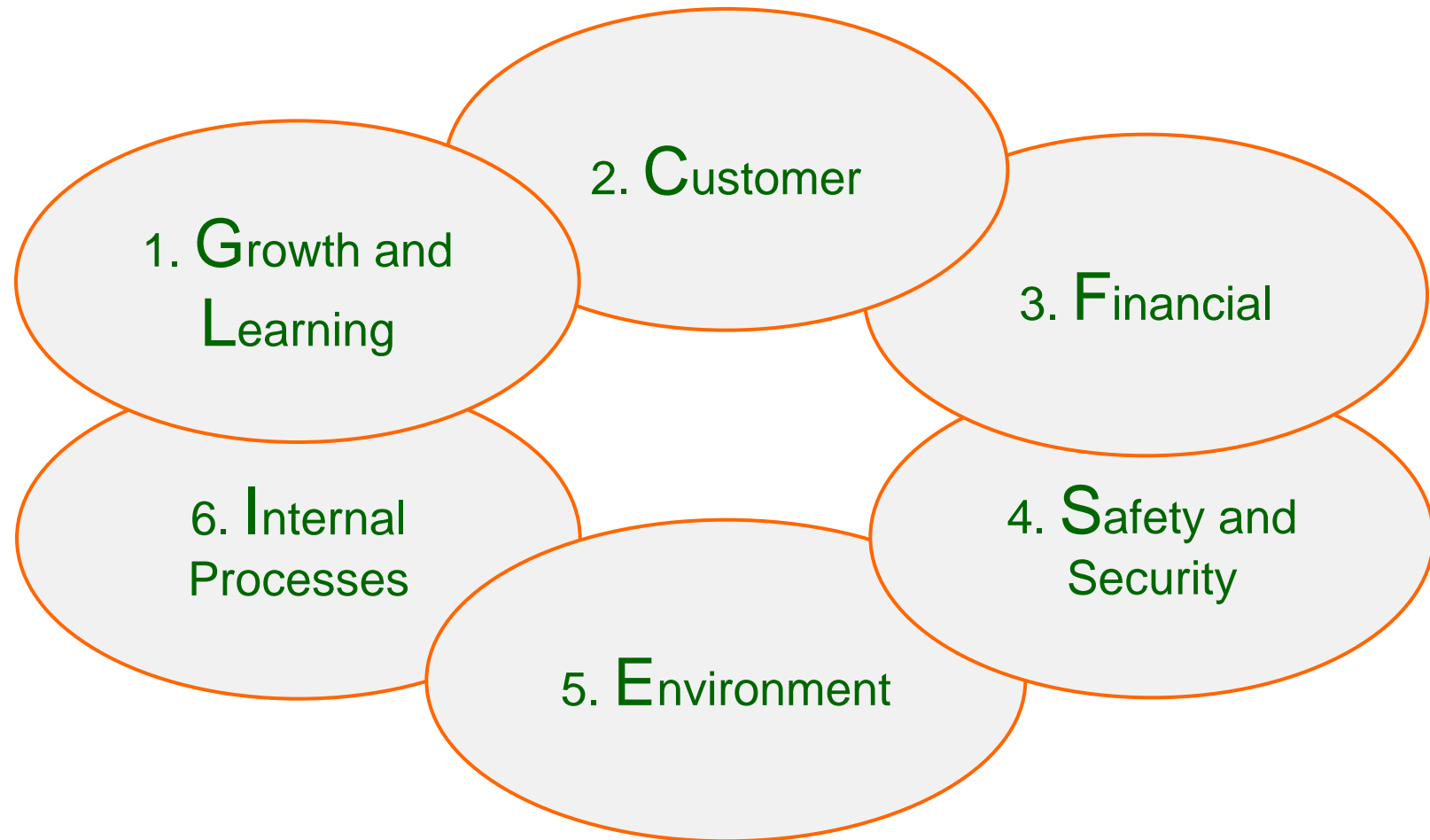
Commercial Speed is a Key Driver of Performance

World Trends Show Speeds are Decreasing

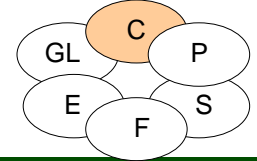


KPI Structure: Balanced Scorecard Approach

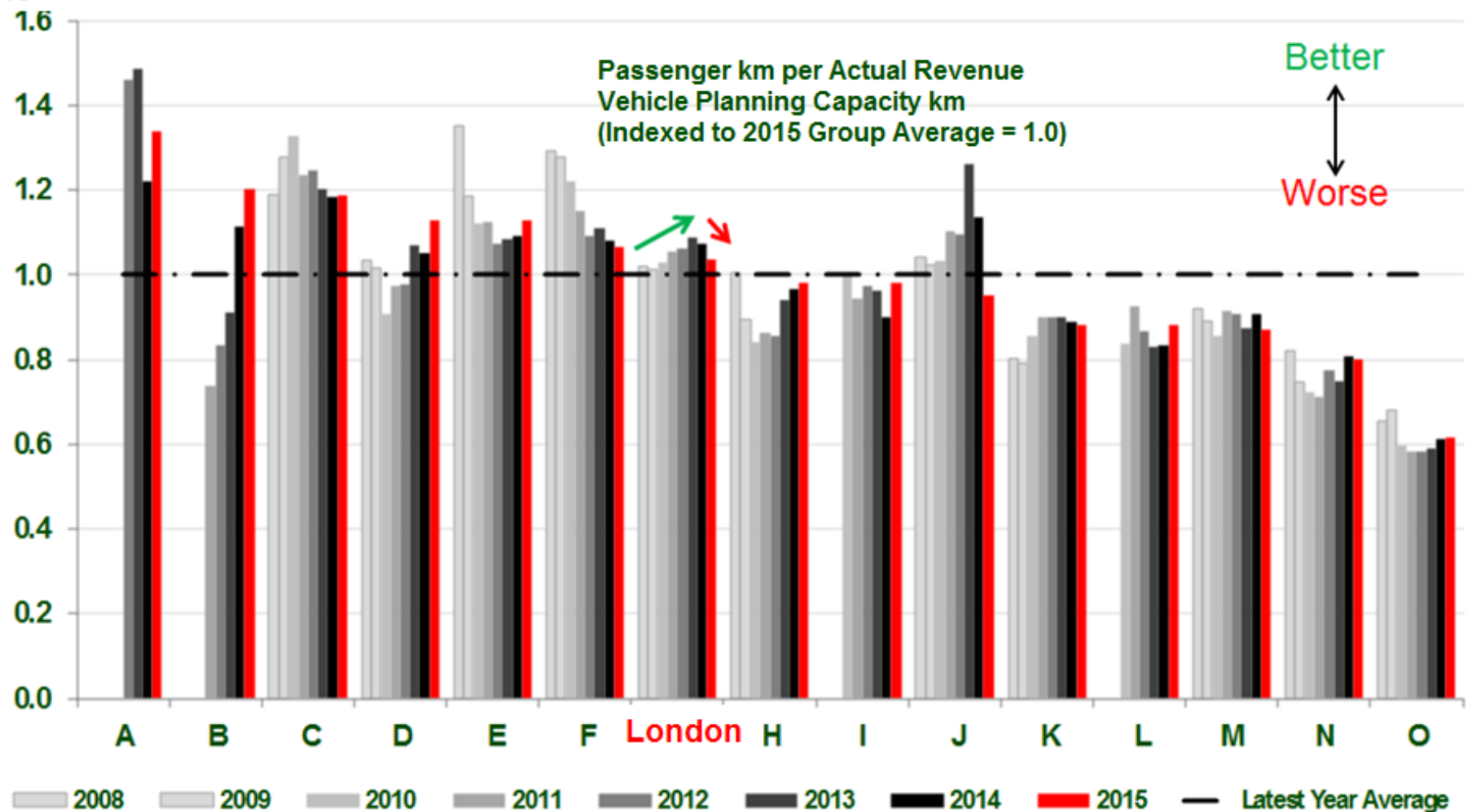
Key topics to measure how organisations perform against each other:



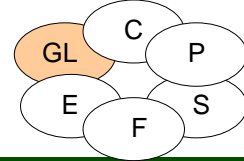
Percentage of Capacity Filled by Passengers



How occupied are the buses on our network?



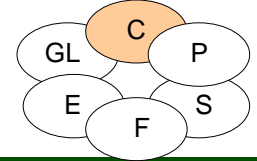
Growth: % Change in Passenger Boardings and Vehicle Kilometres (2010-2015, 5 year change)



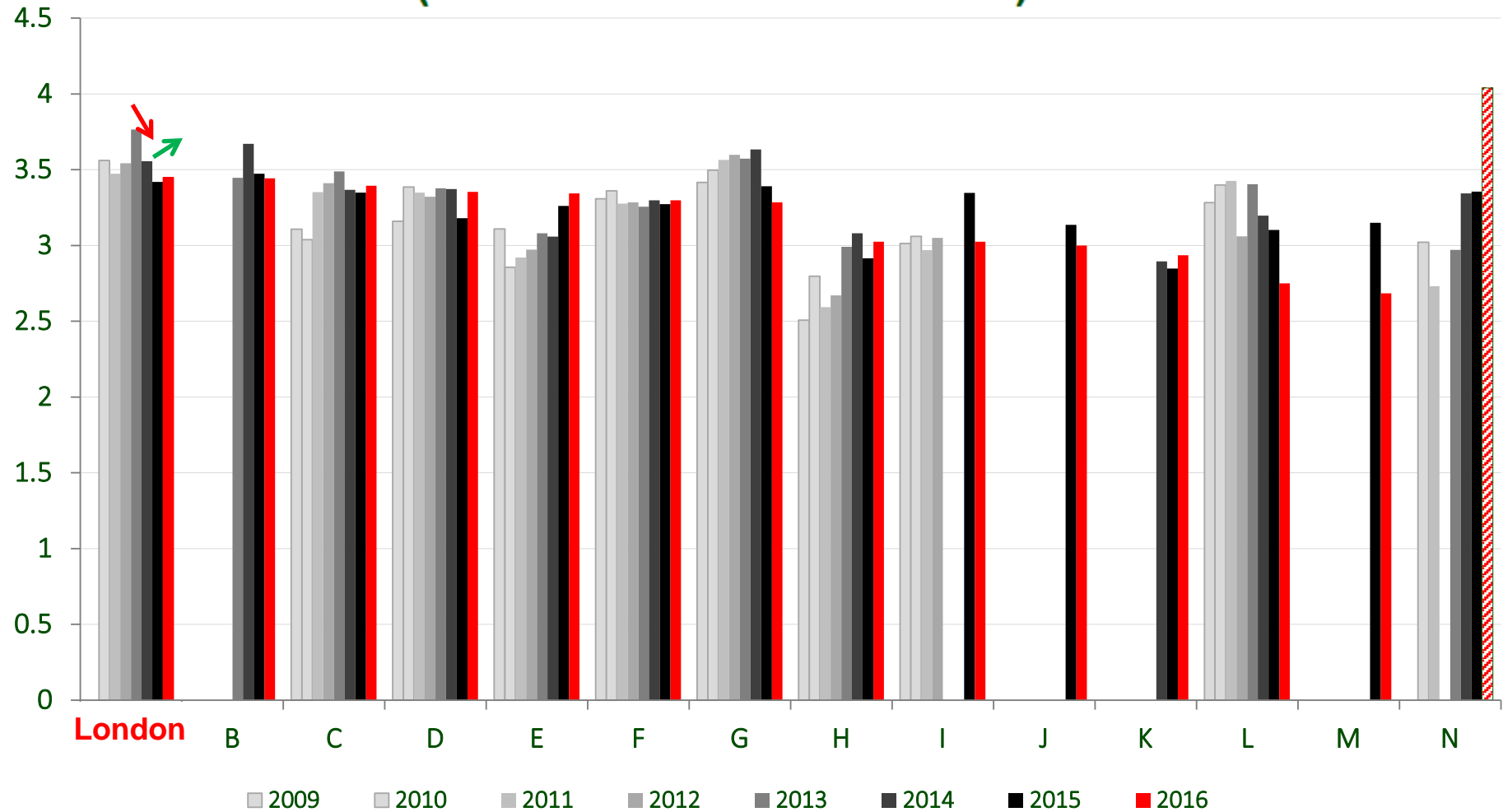
% Change Over 5 Years in Passenger Boardings, Actual Revenue Vehicle Km and Actual Revenue Vehicle Hours (2010-2015)



Customer Satisfaction

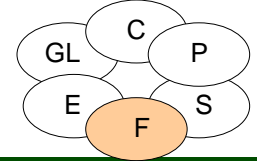


How satisfied are customers with their bus services? (trends of absolute scores)

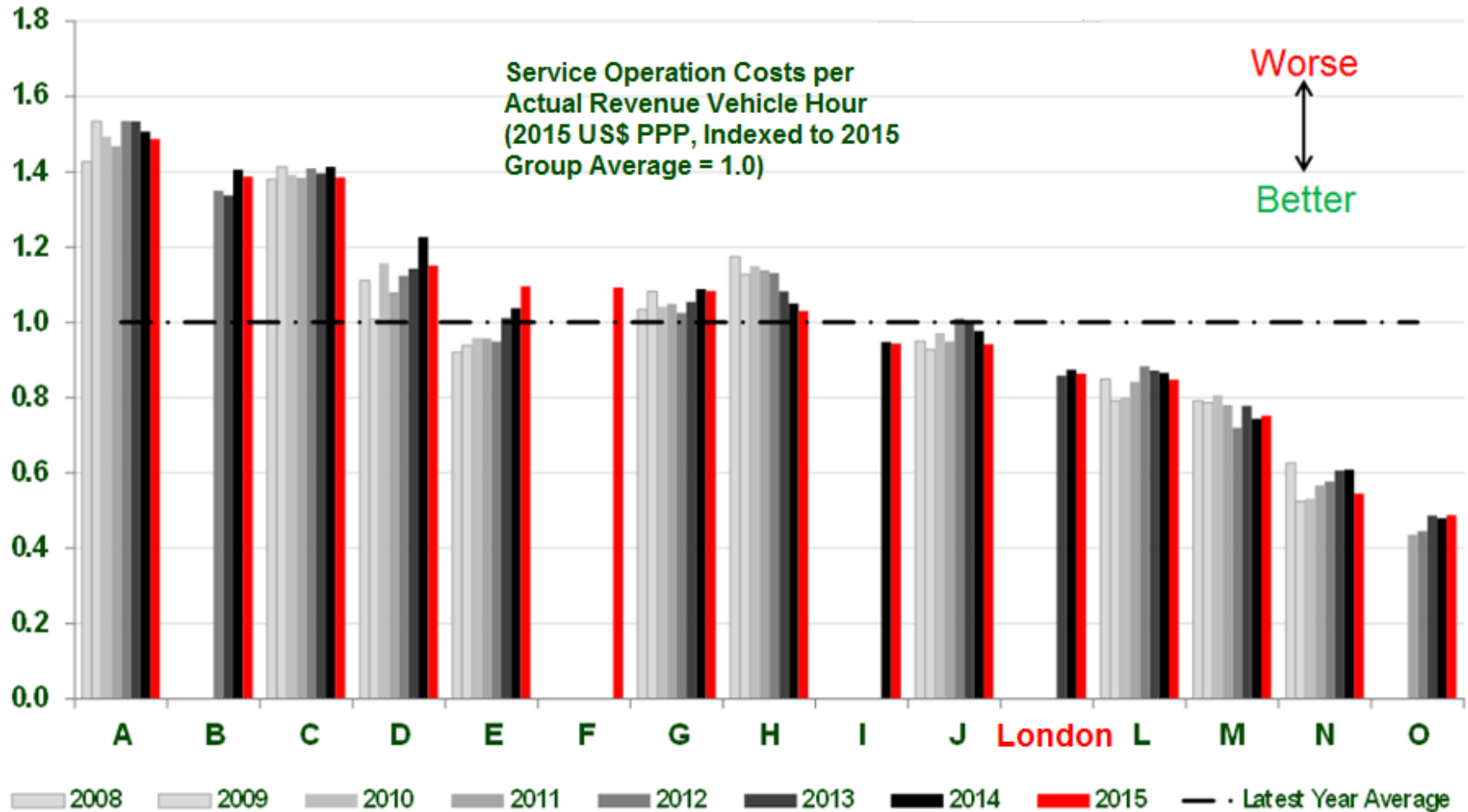


■ Note: International comparisons not advised due to known cultural bias

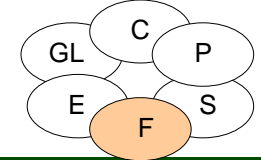
Financial Efficiency: Cost per Vehicle Hour



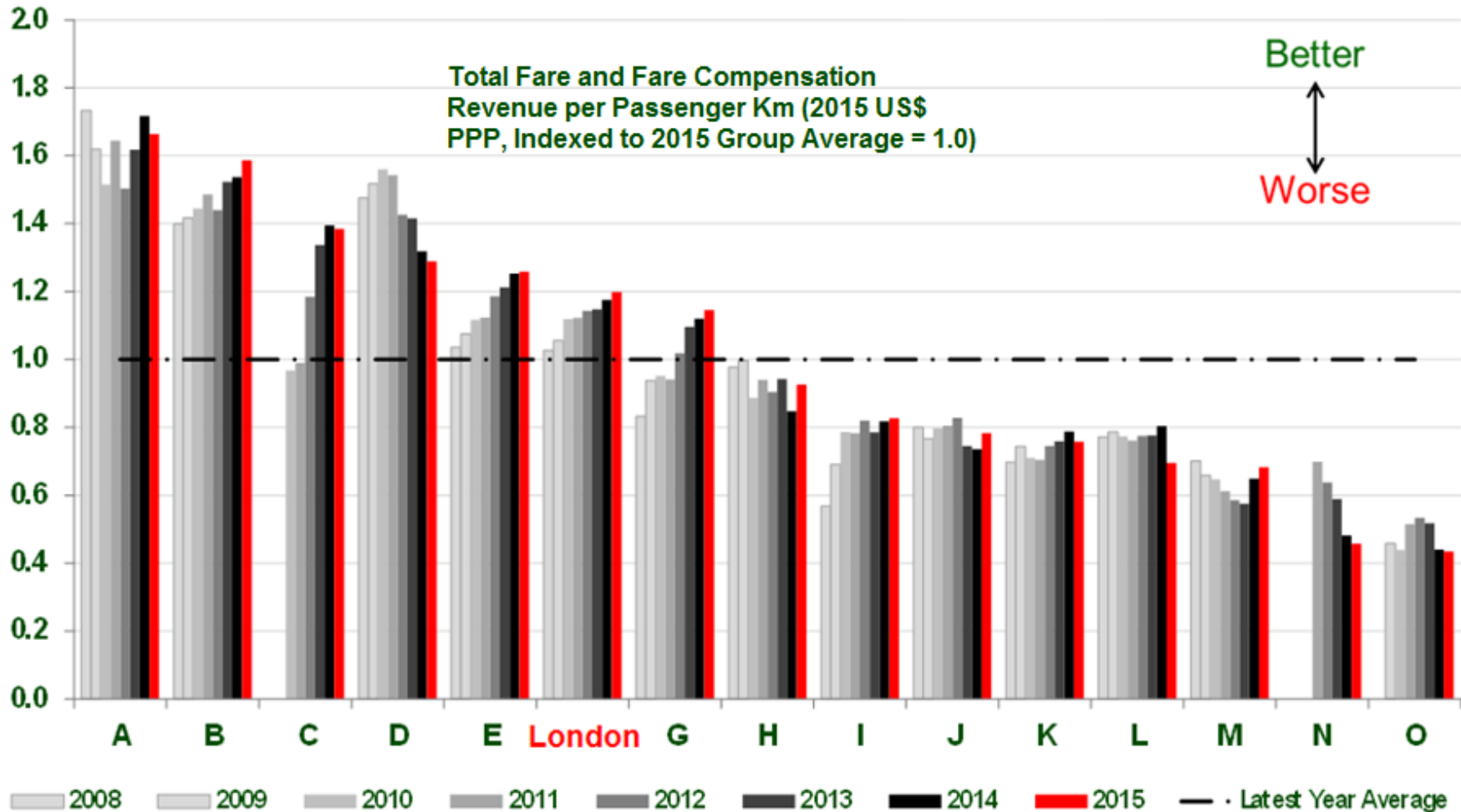
How do costs of running services compare?



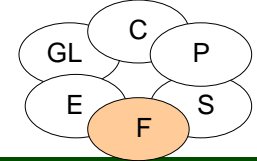
Balancing Affordability and Cost Recovery



How does the average fare per journey compare?

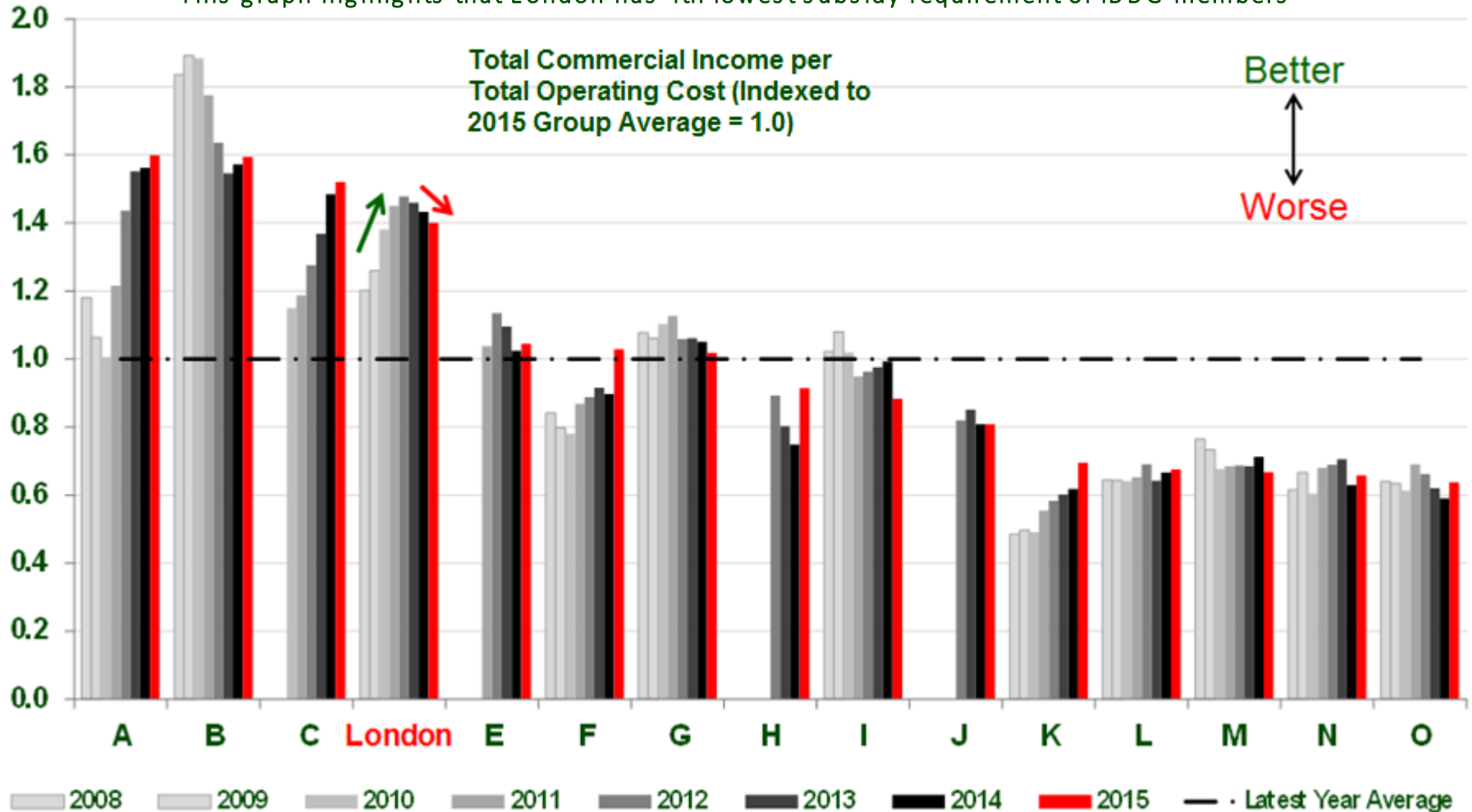


Commercial Recovery Ratio

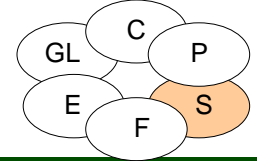


How does the level of income generated vs. operated costs compare?

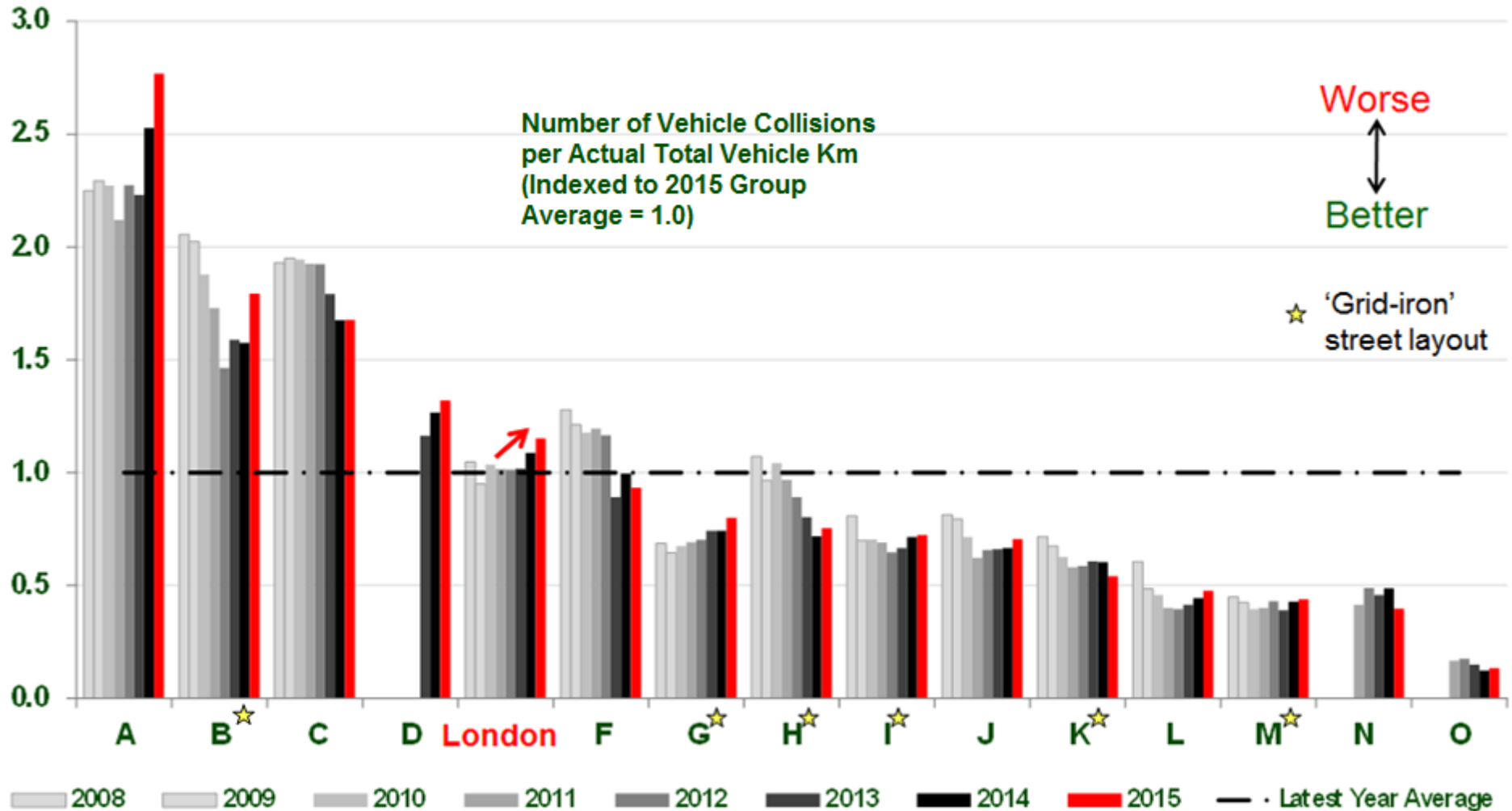
This graph highlights that London has 4th lowest subsidy requirement of IBBG members



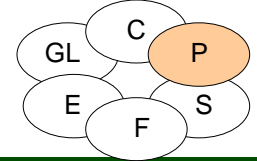
Collisions per Vehicle km



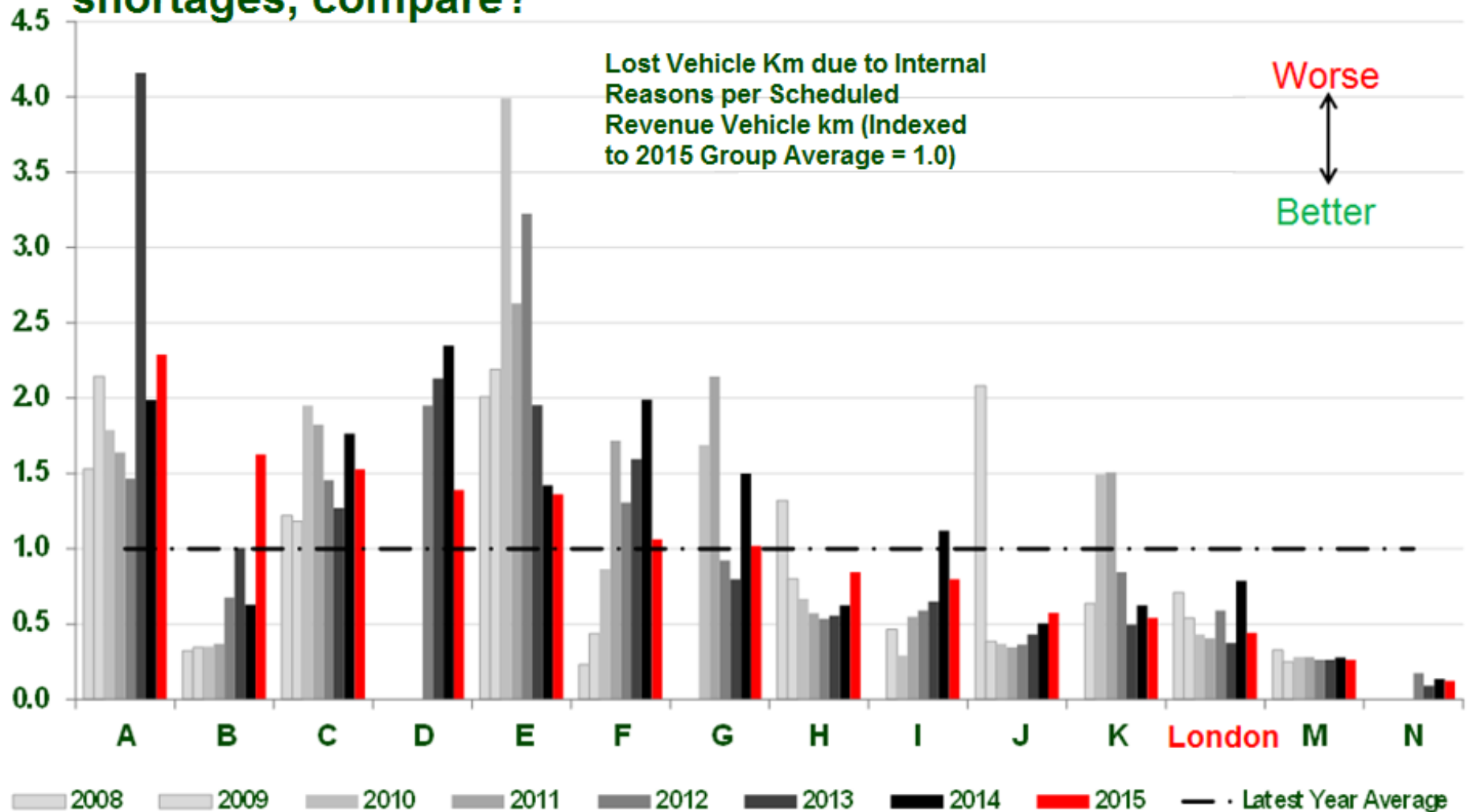
How does the collision rate compare?



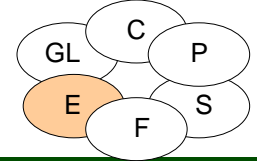
Lost Vehicle Km (Internal Reasons)



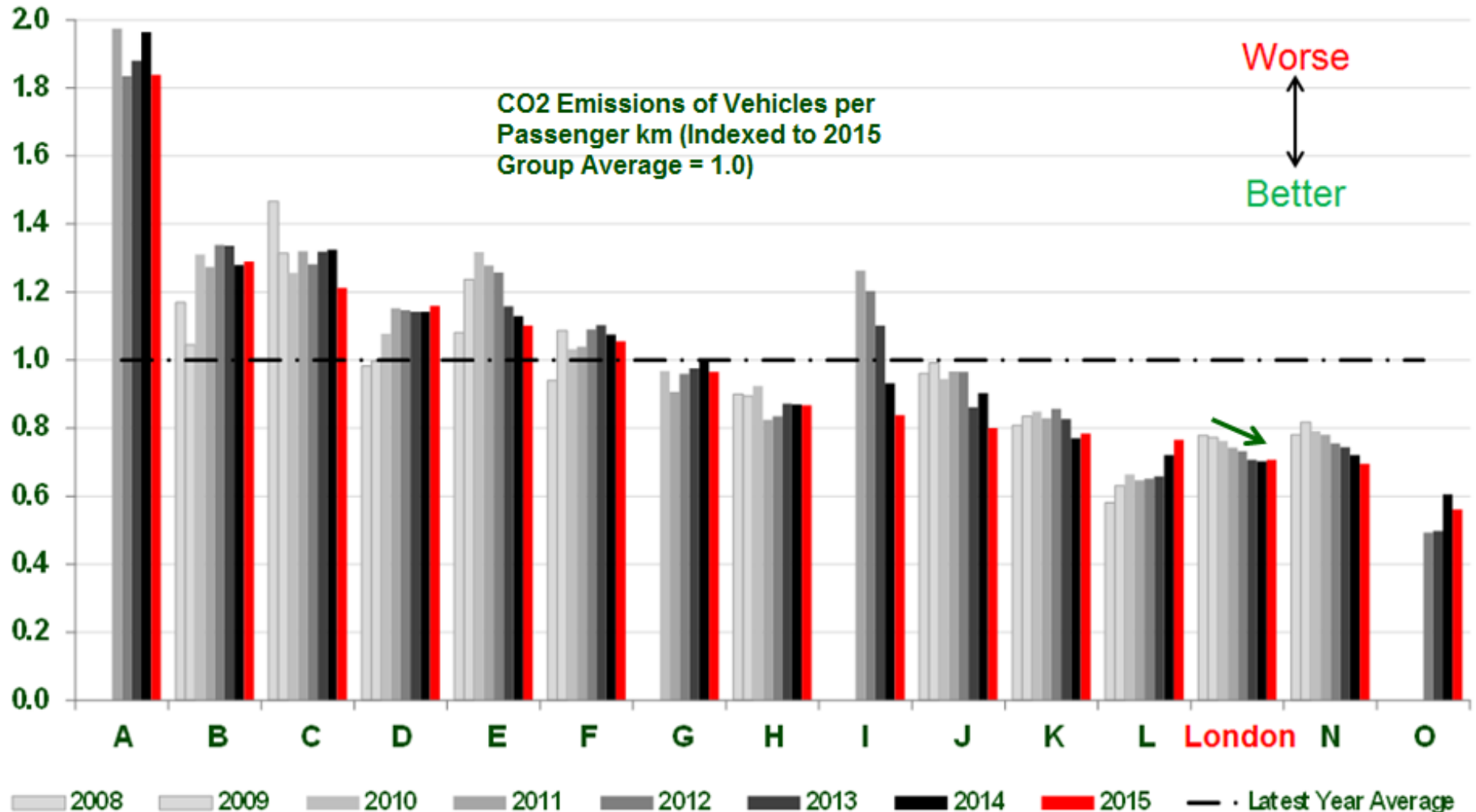
How does lost km due to internal reasons, such as driver shortages, compare?



CO2 per Passenger Km

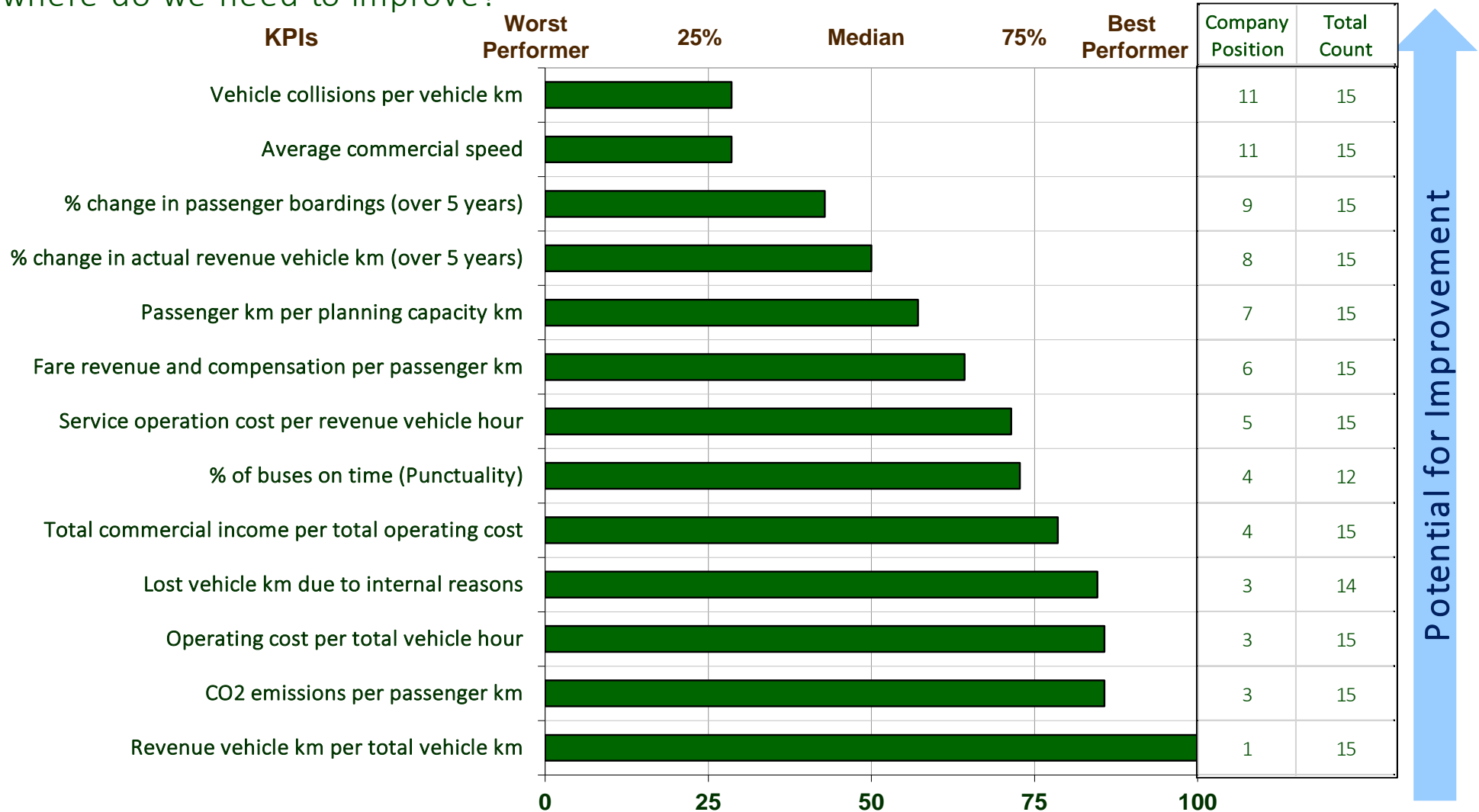


How do CO2 emissions per passenger km compare?



Performance Dashboard (absolute): How Does London Buses Rank Relative to Other Group Members on Several Dimensions in 2015?

How does London perform against other members? Where does London do well and where do we need to improve?



Conclusion: London Buses Continue to be a Good Performer Against Peers, With Above Average Levels in Many KPI's

- Key Performance Driver, Commercial Speed Further Reduced (*roadworks, traffic, etc*)
 - Bus speeds are 12% below group average, affecting internal and relative performance
- Good Asset Utilisation and Availability:
 - Vehicle utilisation is at a good level, 4% above the group average. IBBG agreed to work on development of a Peak Crowding KPI
 - Lost kilometres due to internal reasons generally show long term reduction, apart from industrial action spikes (such as in 2014), and is 3rd best in 2015.
- Good Financial Performance:
 - 4th lowest subsidy requirement compared to other publicly owned international peers, helped by relatively low cost and reasonable fares.
 - Service operating cost per vehicle hour is very good, 5th lowest and 14% below group average.
- Good Environmental Performance:
 - London performs 3rd best. CO2 emissions per passenger km has remained relatively stable over the past three years, which is good given reduction in passenger km.
- Vehicle collisions per Km have increased to above average level:
 - IBBG KPI development improved vehicle collision data comparability studies in 2015
 - Safety is a key focus area for IBBG Members, including London Buses. The IBBG continues work on increased comparability of safety data and further benchmarking opportunities this will create