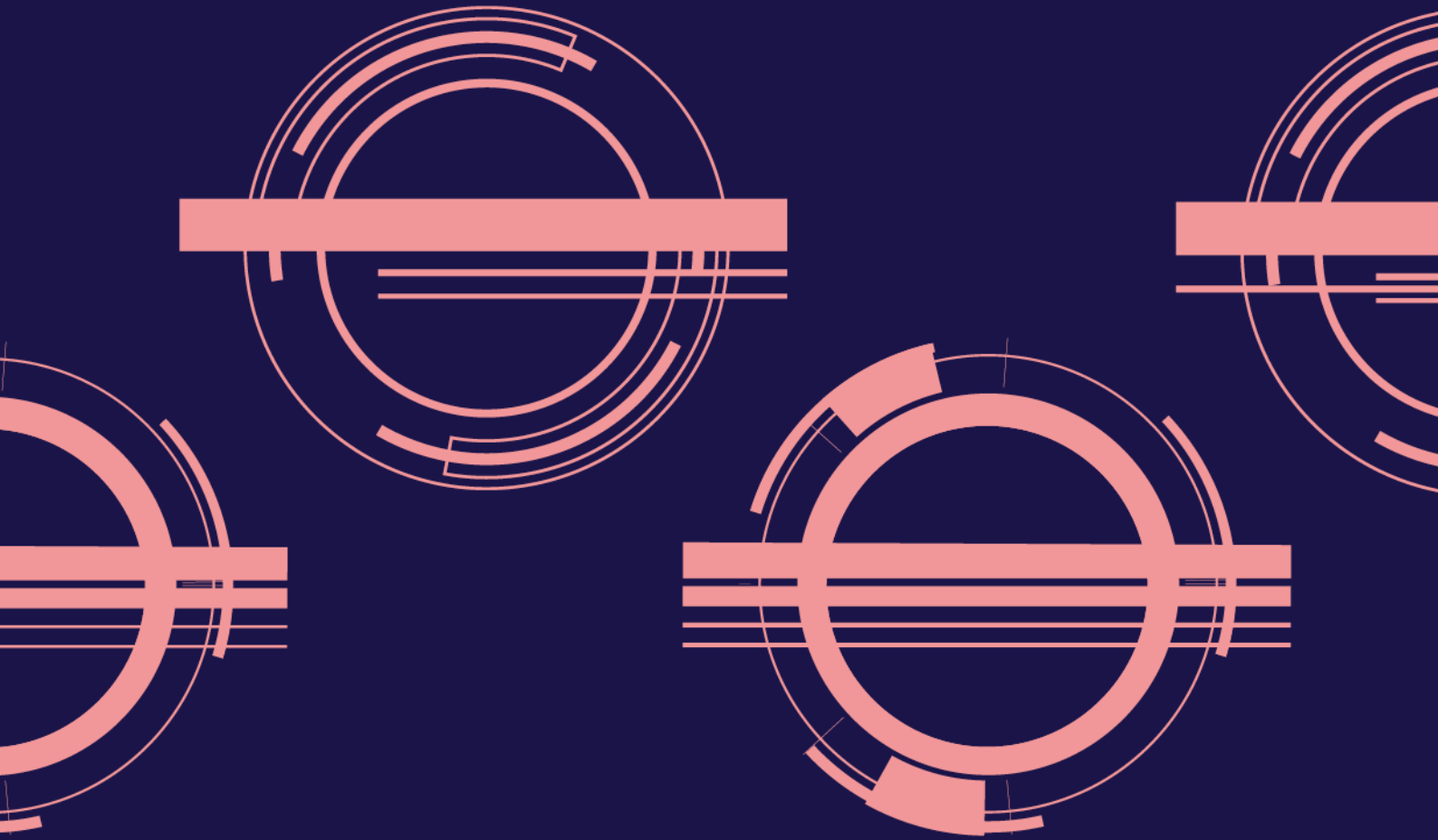December 2024

Travel in London 2024
Trends in public transport demand and operational performance

MAYOR OF LONDON

TRANSPORT FOR LONDON
EVERY JOURNEY MATTERS

Travel in London 2024

Trends in public transport demand and operational performance

2024 update

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Summary of key findings

This report summarises London's public transport demand and performance trends over the last decade until the end of financial year 2023/24.

- Public transport demand has continued to recover following the coronavirus pandemic, but unevenly over days of the week and times of the day relative to pre-pandemic conditions. The overall level of demand, as an aggregate across all modes, remains below that of the last pre-pandemic year (2019/20), at 93 per cent in 2023/24, and the pace of recovery slowed, relative to expectation, during 2024.
- However, this aggregate figure conceals the fact that the Elizabeth line opened in 2022 and would have attracted many new journeys not previously seen on TfL's networks, as well as attracting a proportion of journeys formerly made by other public transport modes. A more detailed analysis of total journeys on individual modes, as of 2023/24, therefore shows levels of shortfall from the pre-pandemic baseline of between three and 15 per cent. For London Underground, the representative recovery percentage as of 2023/24 was 88 per cent. For buses, it was 89 per cent.
- While changes to the timing (within the week and the day) and location of public transport journeys were a key feature of the earlier stages of the pandemic recovery, the latest data from 2023/24 suggest that these are tending to slowly dissipate over time, although an uneven recovery and preference for certain days of the week, particularly away from Mondays, is still apparent on some modes (notably the London Underground and to a lesser extent buses).
    - For the London Underground, recovery is least advanced in the Monday and Friday morning peaks, while Tuesday and Thursday evening peaks are the busiest three-hour periods. Saturday has recovered the most overall but in absolute terms remains materially less busy even than Mondays and Fridays.
    - For buses, there is also least recovery in the Monday and Friday morning peaks, although at a relatively higher level than on the London Underground, largely due to school-related trips. Weekends have also recovered the most on buses, although again remain materially less busy than weekdays overall.
- The Elizabeth line, which opened in May 2022, continued to grow strongly, with a 54 per cent increase in journey stages between 2022/23 and 2023/24. London River Services (up by 13 per cent) and the IFS Cloud Cable Car (up by 4.5 per cent) also showed significant patronage increases during 2023/24.
- In terms of service provision and operational performance, the year 2023/24 saw improvements on most operator-focused metrics (a positive outcome following the challenges experienced in the previous year 2022/23) but these were not consistently reflected for all modes on passenger-focused metrics. The Elizabeth line and London Trams in particular experienced serious reliability challenges in 2023/24. Several other public transport modes saw reductions in overall service provision, reflecting ongoing staffing issues and several significant infrastructure and equipment issues, the roots of which can be traced back to the disruptive effect of the coronavirus pandemic.
- In summer 2023, TfL launched the Superloop network of express bus routes connecting outer London town centres and transport hubs with substantial reductions in customer journey time and various other enhancements to the customer experience compared to regular TfL buses. Overall, Superloop has had a net positive impact on bus demand (even accounting for abstraction from parallel routes)

and Superloop routes are generally showing better demand outcomes than the rest of the bus network. Furthermore, perception surveys conducted after the new services were introduced showed positive results, with most respondents (between 92 and 99 per cent) recognising the brand, thinking that Superloop services were better than other buses (88 per cent) and saying that they would use the service again (93 per cent), thus indicating that Superloop is a valued new product.

For more information about any of the items featured in this report please contact TiLEnquiries@tfl.gov.uk.

# Public transport demand and performance overview

This section provides an overview of recent demand and performance trends on the main TfL public transport modes, considered as a whole. Mode-specific details are provided in subsequent sections of this document.

Consolidated long-term demand trends

Public transport demand in London over the last 10 years shows two clearly distinct features (figure 1):

- Until 2019/20, overall demand was broadly stable, with a small peak in 2015/16. This relative stability took place in the context of a growing population and continuing cost-of-living pressures. This period of stability was preceded by two decades of sustained growth in demand as described in previous Travel in London reports.
- From 2020/21, overall public transport demand has been shaped by the impacts of the coronavirus pandemic, first with the sharp drop in demand and subsequently with a steady recovery. This recovery, however, continues to present features that reflect post-pandemic adaptations, notably hybrid working.

Figure 1   Change (index: 2013/14 = 100) in patronage on the main TfL public transport modes, 2013/14-2023/24.
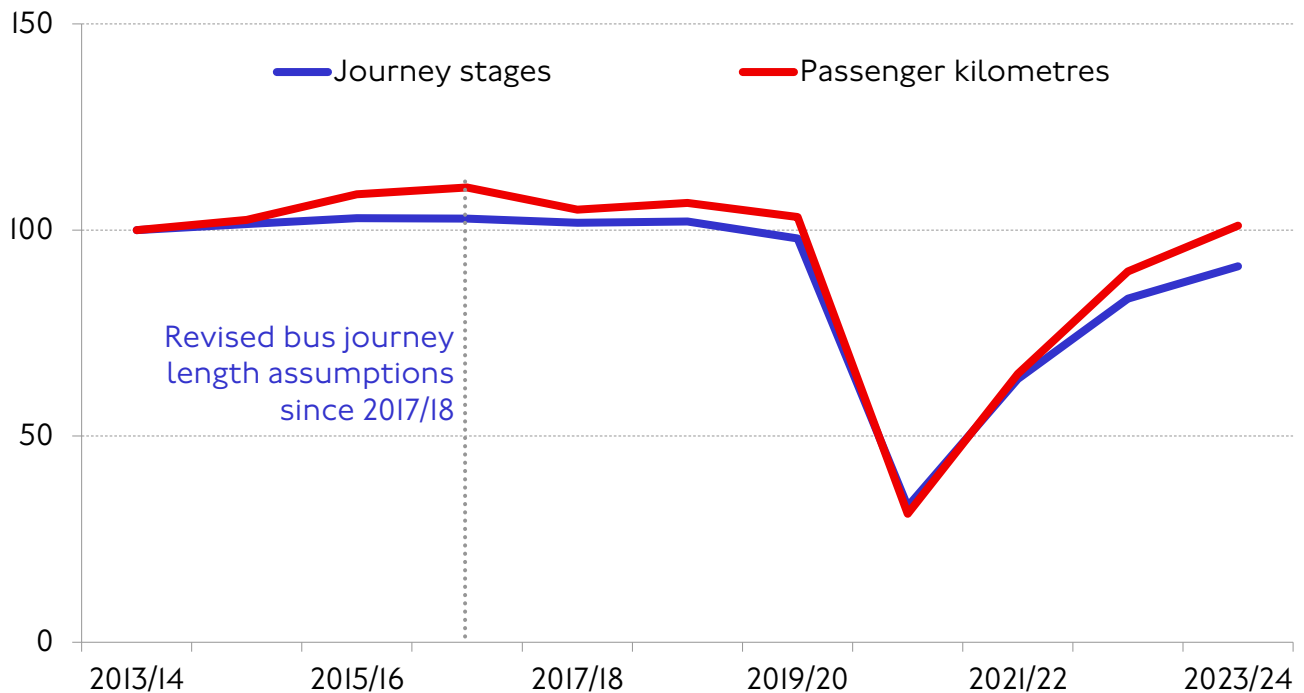
Source: TfL Strategic Analysis, Customer & Strategy, based on Office of Rail and Road and TfL service performance data.
Notes: This graph excludes patronage on London River Services, the IFS Cloud Cable Car and National Rail in London (where not a TfL-operated mode). | In 2013/14 (reference year) there were 3,916 million journey stages and 20,383 million passenger kilometres.

In 2023/24, passenger kilometres were 98 per cent of the 2019/20 level. However, overall journey stages were still only at 93 per cent versus 2019/20, which shows a more significant shortfall on this measure.

These overall recovery figures need to be seen in the context of changes to the public transport offer over the last few years. The most important of these was the opening of the Elizabeth line in 2022/23, which was transformational and unlocked demand for new journeys by public transport and existing journeys that would previously have been made by other modes. The opening of the Elizabeth line may also partly explain the faster recovery of kilometres travelled compared to journey stages, since the Elizabeth line tends to support longer journeys.

Figure 1 provides an overview of demand changes on the main TfL-operated public transport modes but conceals the variability across the modes. Table 1 shows an overview of public transport demand in terms of journey stages on TfL-operated modes.

Excepting London Trams, in 2023/24 all modes saw an increase in journey stages relative to the previous year (2022/23). However, only River Services and the IFS Cloud Cable Car showed demand exceeding the pre-pandemic (2019/20) baseline, with varying levels of shortfall (between three and 15 per cent) on the other modes.

Table 1   Journey stages (millions) on TfL's public transport modes, 2013/14-2023/24.

Year	Buses	LU	DLR	LO[1]	EL[1,2]	Trams	Total[3]	River Services	IFS Cloud Cable Car
2013/14	2,382	1,265	102	136	-	31	**3,916**	8.4	1.5
2014/15	2,385	1,305	110	140	-	31	**3,972**	10.0	1.5
2015/16	2,314	1,349	117	183	37	27	**4,028**	10.2	1.5
2016/17	2,262	1,378	122	189	45	30	**4,025**	10.4	1.5
2017/18	2,247	1,357	120	190	42	29	**3,985**	10.0	1.4
2018/19	2,220	1,385	122	188	51	29	**3,995**	9.8	1.4
2019/20	2,112	1,337	117	186	56	27	**3,835**	9.6	1.2
2020/21	865	296	40	59	18	12	**1,290**	1.6	0.4
2021/22	1,491	748	77	127	37	19	**2,499**	5.3	1.4
2022/23	1,785	1,065	92	157	143	21	**3,263**	8.5	1.5
2023/24	1,870	1,181	99	181	220	20	**3,571**	9.6	1.6
Change 2022/23-2023/24	4.8%	10.9%	7.2%	15.5%	53.9%	-4.5%	**9.4%**	13%	4.5%

Source: TfL Strategic Analysis, Customer & Strategy, based on Office of Rail and Road and TfL service performance data.
Note: On all modes except London Overground, a 'journey stage' is a leg of a whole trip by a single mode without additional validation. For example, a trip involving two buses would generate two bus journey stages; but a trip using two lines on the same rail mode without crossing barriers would generate only one journey stage. On London Overground, each train boarding is counted as a separate journey stage.
1: The London Overground and Elizabeth line figures are Office of Rail and Road estimates based on ticket sales, with known limitations especially for the Elizabeth line, so they should be considered only indicative.
2: The Elizabeth line opened in May 2022 so the results up to 2021/22 refer to the former TfL Rail services.
3: This total excludes River Services and the IFS Cloud Cable Car for easier comparison with table 2 below, given that passenger kilometre data is not available for these modes.

Table 2 shows the equivalent trends in terms of kilometres travelled. The overall conclusions about the 2023/24 trends are the same, although in general the shortfall from the pre-pandemic baseline is smaller in relative terms for passenger kilometres (between two and 10 per cent) than it was for journey stages. The DLR stands out as an exception, where passenger kilometres are 22 per cent short of the pre-pandemic baseline (compared to 15 per cent in terms of journey stages). It is the only mode where the recovery of journey stages is faster than that of kilometres, suggesting a greater resilience of, or a shift towards, shorter journeys.

Table 2   Passenger kilometres (millions) on the main TfL public transport modes, 2013/14-2023/24.

Year	Buses	LU	DLR	LO[1]	EL[1,2]	Trams	Total
2013/14	8,420	10,423	537	840	-	162	**20,383**
2014/15	8,418	10,847	590	863	-	160	**20,878**
2015/16	8,188	11,458	623	1,237	505	140	**22,150**
2016/17	8,016	11,797	657	1,294	569	154	**22,487**
2017/18	6,899[3]	11,869	644	1,296	534	151	**21,393**
2018/19	6,836	12,150	654	1,288	643	149	**21,719**
2019/20	6,538	11,746	621	1,273	706	141[4]	**21,025**
2020/21	2,754	2,707	207	402	222	60	**6,352**
2021/22	4,774	6,680	398	864	460	98	**13,274**
2022/23	5,762	9,543	460	1,076	1,389	109	**18,338**
2023/24	6,032	10,573	482	1,253	2,159	104	**20,602**
Change 2022/23-2023/24	4.7%	10.8%	4.8%	16.5%	55.4%	-4.5%	**12.3%**

Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
1: See note 1 on table 1.
2: See note 2 on table 1.
3: Methodological changes created a break in the time series for passenger kilometres after 2017/18.
4: London Trams passenger kilometre estimates rely on assumptions about average trip length derived from a survey last done in 2018/19, so the values after that use the latest available average trip length.

Pandemic recovery trends

The annual estimates shown in the previous section conceal the 'within year' progress towards the recovery of public transport demand from the coronavirus pandemic.

Figure 2 shows the indicative demand recovery trends (compared to the 2019/20 baseline) on the main TfL-operated public transport modes by financial period, up to the most recent period where data is available. The data is presented as a moving average of the 13 previous financial periods (a full year), which reduces the impact of temporary disruptions and period-on-period fluctuations, showing the underlying trend more clearly.

Figure 2

Figure 2   Passenger journeys recovery (from the 2019/20 baseline) on the main TfL public transport modes, by financial period, 13-period moving average, period 1 2021/22-period 5 2024/25.
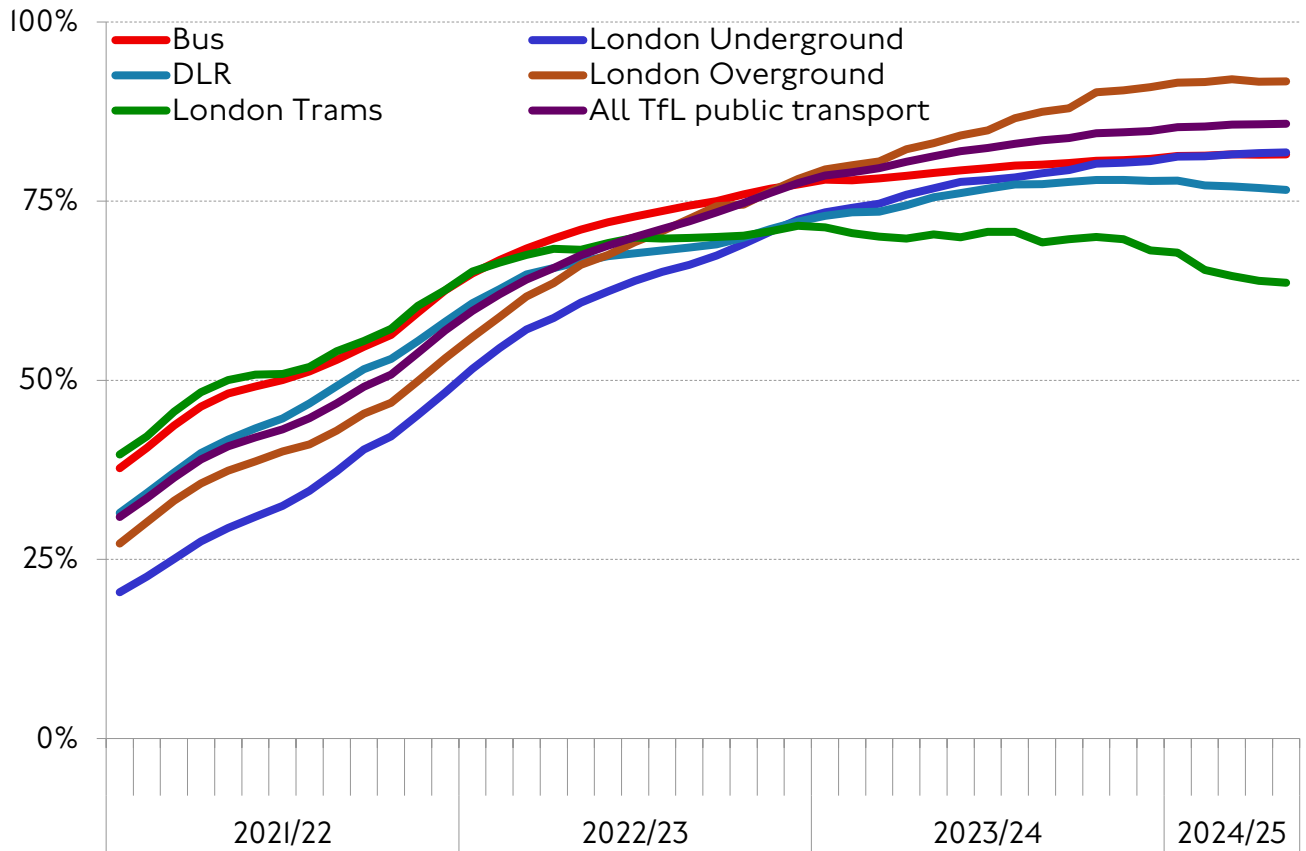
Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
Notes: The Elizabeth line is not shown separately but its demand is included in the 'All TfL public transport' series. | Period 5 2024/25 figures are early estimates and therefore subject to change.

Overall, the trends shown in figure 2 support the conclusions outlined above, whereby the recovery seems to have slowed down in recent months across all modes and has been particularly challenging for London Trams and most encouraging on the London Overground. Also of note is how the London Underground's long-term recovery surpassed the DLR in late 2022/23 and reached bus recovery levels in early 2024/25.

Service provision and journey time metric overview

Table 3 summarises selected performance indicators for each of the main TfL-operated public transport modes. These metrics mostly reflect the operator's perspective and, for 2023/24, show small improvements across most modes, with the notable exception of the Elizabeth line, which suffered significant reliability issues throughout 2023.

Table 3   Selected performance indicators on the main TfL-operated public transport modes, 2013/14-2023/24.

Year	Buses: kilometres operated	LU: kilometres operated	DLR: services operated	Trams: services operated	LO: PPM[1]	EL: PPM[1]
2013/14	97.7%	97.5%	99.2%	98.9%	95.8%	-
2014/15	97.1%	97.6%	99.3%	97.9%	95.0%	-
2015/16	97.2%	97.5%	98.5%	99.0%	94.4%	91.4%
2016/17	97.4%	96.9%	99.0%	97.1%	94.5%	91.8%
2017/18	98.1%	96.6%	98.4%	98.5%	94.4%	89.8%
2018/19	98.1%	96.8%	99.0%	98.5%	93.8%	93.8%
2019/20	97.8%	94.0%	99.0%	98.2%	92.6%	95.2%
2020/21	98.7%	87.2%	99.3%	98.3%	96.2%	96.0%
2021/22	97.9%	88.2%	98.5%	98.5%	95.2%	94.2%
2022/23	96.0%	88.3%	98.3%	92.2%	93.5%	92.8%
2023/24	96.9%	90.8%	98.3%	93.6%	93.6%	88.0%
Change 2022/23-2023/24	+0.9pp[2]	+2.5pp	0pp	+1.4pp	+0.1pp	–4.8pp

Source: TfL Strategic Analysis, Customer & Strategy, based on Office of Rail and Road and TfL service performance data.
1: Annual average of the Public Performance Measure (PPM), which is a metric that combines punctuality and reliability to represent the proportion of all scheduled trains that are 'on time', which for operators in the London and South-East region means arriving at the destination no later than five minutes after the scheduled arrival time.
2: Percentage points.

This operator's view, however, does not necessarily reflect what passengers experience on their journeys. To give a more rounded picture of performance that includes the passengers' perspective, table 4 shows the trends in the customer journey time metric on TfL's main public transport modes.

The journey time metric is a customer-focused performance measure that reflects the average duration of a public transport journey as perceived by passengers. It takes account of both the normal timetable as well as service disruptions and is weighted by demand, which enables TfL as the operator to focus on the times and locations where service delivery has the biggest impacts. It measures each element of the journey (including waiting, in-vehicle time, and interchanging) for each customer and applies

evidence-based weightings to these elements to reflect how customers perceive them. While there are minor differences in how the journey time metric is calculated for each specific mode, in all cases the main output is a single figure which gives the average journey time per customer journey in weighted minutes.

The data for 2023/24 presents a mixed picture, with some modes like the DLR and the London Overground showing small improvements (reductions) in customer journey time compared to the previous year while others like buses, London Underground and notably London Trams saw a small deterioration (increase) in customer journey time over the last year. For the Elizabeth line, the improvement in customer journey time, brought about by the new timetable, also introduced new sources of unreliability (as reflected in table 3 above).

Table 4   Journey time metric (in minutes) on the main TfL-operated public transport modes, 2018/19-2023/24.

Year	Bus[1]	London Underground[2]	DLR	London Overground	Elizabeth line	London Trams
2018/19	32.5	29.0	21.2	32.9	-	19.7
2019/20	32.2	29.1	20.9	32.8	-	20.1
2020/21	30.5	25.0	20.8	30.7	-	20.0
2021/22	31.7	26.9	21.4	30.8	-	19.6
2022/23	34.0[3]	27.8	21.3	30.6	25.8[4]	20.8
2023/24	34.1	28.3	20.6	30.1	25.4	21.6
Change 2022/23-2023/24	+0.1pp	+0.5pp	-0.7pp	-0.5pp	-0.4pp	+0.8pp

Source: TfL Public Transport Service Planning.
Note: The figures shown on this table were calculated using demand estimates from 2019. From 2023/24, it was possible to calculate equivalent figures using 2022 demand estimates. These have not been provided here because they cannot be compared on a like-for-like basis with the results prior to 2022/23 but they will be provided in future Travel in London reports.
1: This metric represents only high-frequency services (those operating with a scheduled frequency of five or more buses per hour). The all-routes metric is only available in 2022/23 (34.6min) and 2023/24 (34.7min).
2: The London Underground journey time metric currently excludes access, egress and interchange time, which is around 12.5 minutes on average and explains the differences with previously published results.
3: The step change on the buses journey time metric in 2022/23 is partly due to methodological changes in the assumptions about average journey length since the pandemic (an estimated 0.8min increase which is therefore not directly related to performance).
4: Reporting on the Elizabeth line started in Q4 2022/23, so this value represents only that quarter.

Public transport demand by mode

This section considers in more detail the demand trends on each of the public transport modes, both in terms of longer-term trends over the past decade, but also with a focus on post-pandemic recovery patterns.

Bus

Buses are the backbone of London's public transport network and the most used public transport mode, connecting communities and places and providing key access to other transport services and networks.

Figure 3   Passenger kilometres and journey stages by bus, 2013/14-2023/24.
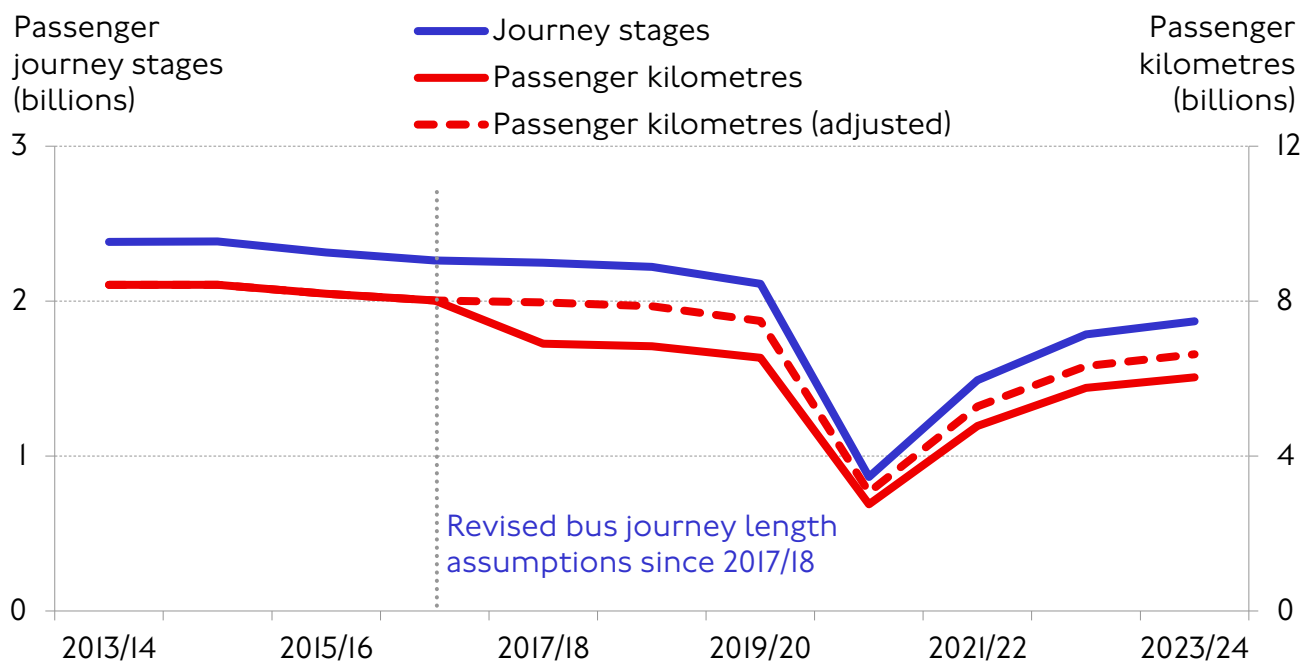
Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
Notes: On buses, each boarding (even within the same trip) is computed as an additional 'journey stage'. | Methodological changes created a break in the time series for passenger kilometres after 2017/18. To allow like-for-like comparisons across this break, an adjusted series using the old assumptions is provided.

As shown in figure 3, demand for buses was following a steady decline in the years before the coronavirus pandemic, having risen rapidly in the early years of the millennium. Following the disruption of the pandemic itself, the bus demand recovery trajectory slowed down and in 2023/24 was stabilising at a level 8-11 per cent below the pre-pandemic 2019/20 baseline.

Demand by day of the week

Of interest is how the recovery of bus demand has differed between days of the week and times of the day.

Figure 4 shows London bus demand by day of the week for a representative week in spring 2024, compared to the equivalent week in 2019 before the pandemic. The proportion of the pre-pandemic baseline for each day is also included for reference.

Figure 4   Bus journey stages (in millions) by day of the week, week commencing 10 Jun 2019 versus week commencing 10 Jun 2024.
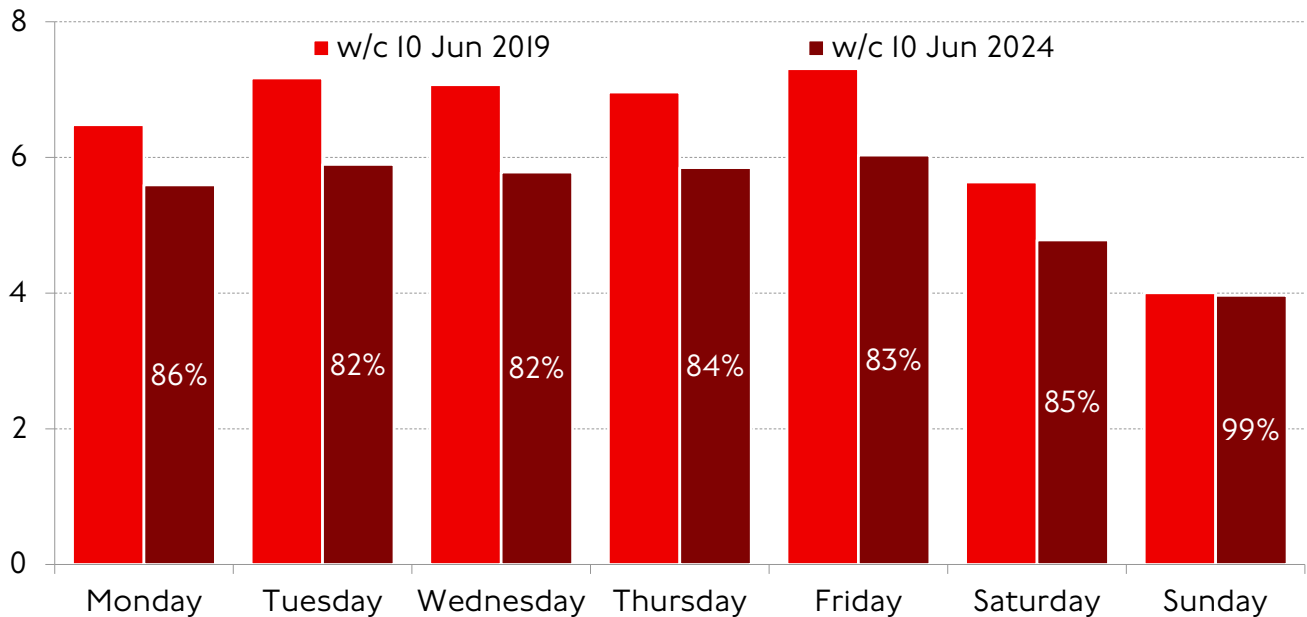
Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
Note: On buses, each boarding (even within the same trip) is computed as an additional 'journey stage'.

The overall pattern of relative patronage across the different days of the week in 2024 was broadly similar to before the pandemic. The recovery of bus demand was also relatively even, with proportions between 82 and 86 per cent across all days of the week except Sunday, at 99 per cent on this representative week.

Demand recovery by time of day and day of the week

Table 5 shows the state of the pandemic recovery for buses by time of day and day of the week at a representative week in spring 2024.

Table 5   Bus demand recovery by time of day and day of the week, 16-22 Mar 2024 versus 16-22 Mar 2019.

Time	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Early morning (04:00-07:00)	91%	90%	90%	92%	89%	104%	112%
Morning peak (07:00-10:00)	78%	79%	82%	80%	76%	97%	98%
Early inter-peak (10:00-13:00)	88%	89%	91%	90%	90%	93%	85%
Late inter-peak (13:00-16:00)	87%	88%	89%	89%	88%	97%	89%
Evening peak (16:00-19:00)	82%	84%	84%	85%	83%	97%	100%
Evening (19:00-22:00)	86%	88%	127%	92%	92%	100%	108%
Late evening (22:00-01:00)	96%	98%	123%	105%	95%	107%	112%
Whole day	**84%**	**86%**	**90%**	**87%**	**86%**	**97%**	**96%**

Source: TfL Public Transport Service Planning.
Note: The underlying data includes Oyster and contactless payment but not paper tickets.

The recovery is least advanced in the Monday and Friday morning peaks (at 78 and 76 per cent, respectively), although this is still relatively higher than the level seen on London Underground (see table 6 in the next section), due to school-related trips.

Weekends have recovered the most, although in absolute terms they remain materially less busy than weekdays.

London Underground

The London Underground provides turn-up-and-go services across the Capital and is the most used rail mode in London.

Figure 5   Passenger kilometres and journey stages by London Underground, 2013/14–2023/24.
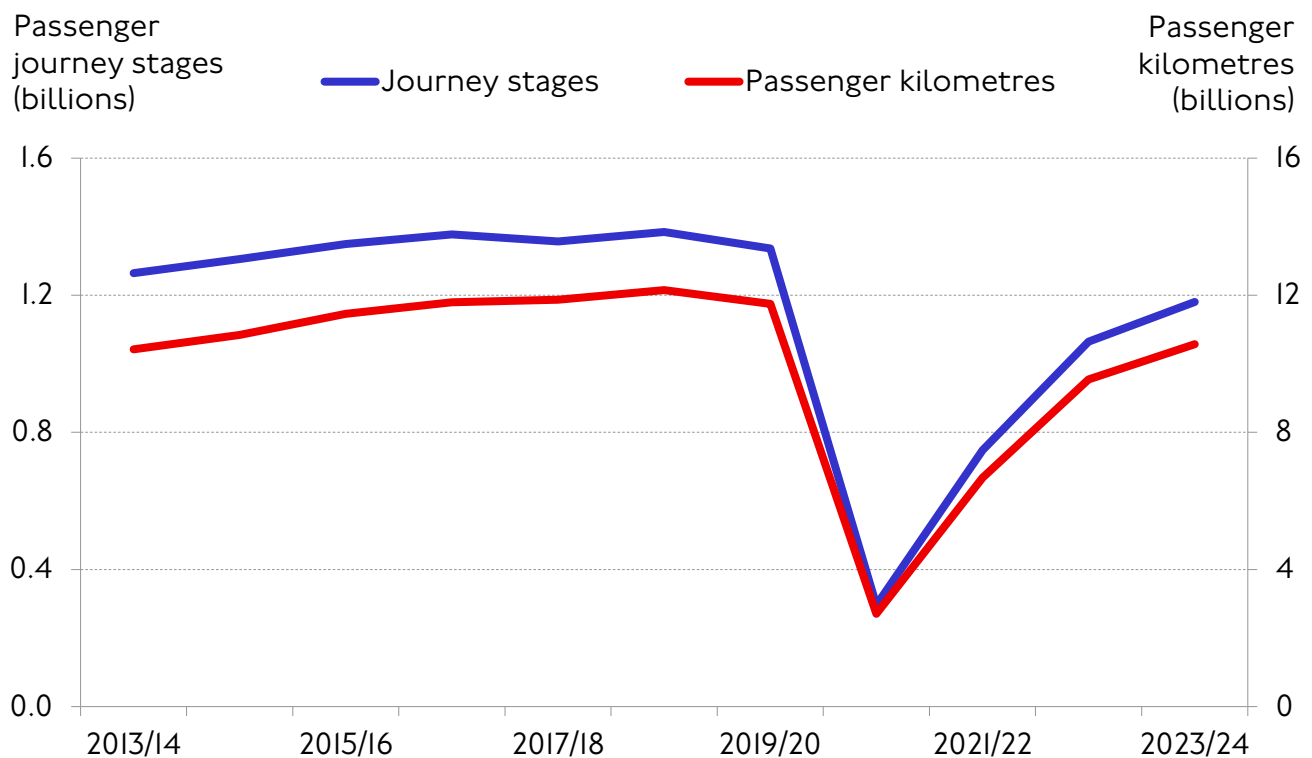
Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
Note: On London Underground, a 'journey stage' is a leg of the trip with no additional validation. Hence, one journey stage may involve several lines when the interchange does not require crossing barriers. However, any 'out-of-station' interchange where validation is required is counted as a new journey stage.

Figure 5 shows that demand on the London Underground was growing slowly before the coronavirus pandemic after a decade of strong growth in the previous decade.

As with buses, the pace of the pandemic recovery slowed in 2023/24, with demand over the whole 2023/24 financial year stabilising at a level 10-12 per cent below the pre-pandemic 2019/20 baseline.

Demand by day of the week

Figure 6 shows London Underground demand by day of the week for a representative week in spring 2024, compared to the equivalent week in 2019 before the pandemic. The proportion of the pre-pandemic baseline for each day is also included for reference.

Figure 6 London Underground journey stages (in millions) by day of the week, week commencing 10 Jun 2019 versus week commencing 10 Jun 2024.
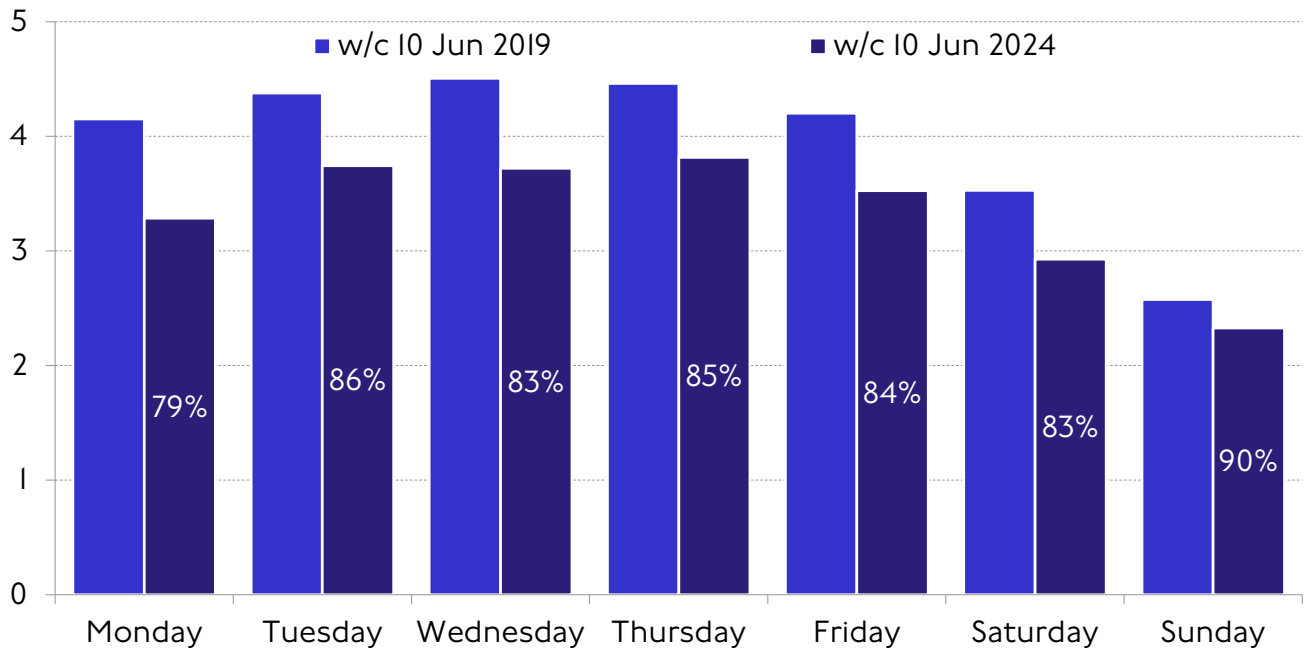
Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
Note: See note on figure 5 for the definition of 'journey stage' on the London Underground.

Although the overall pattern of relative patronage share across the different days of the week in 2024 was broadly similar to before the pandemic, the recovery proportions range more widely, from 79 per cent on Monday to 90 per cent on Sunday.

Demand recovery by time of day and day of the week

Table 6 shows the state of the pandemic recovery for the London Underground by time of day and day of the week for a representative week in spring 2024.

Table 6   London Underground demand recovery by time of day and day of the week, 16–22 Mar 2024 versus 16–22 Mar 2019.

Time	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Early morning (04:00-07:00)	76%	77%	76%	77%	74%	83%	87%
Morning peak (07:00-10:00)	70%	79%	79%	79%	62%	88%	91%
Early inter-peak (10:00-13:00)	85%	89%	90%	90%	86%	98%	96%
Late inter-peak (13:00-16:00)	89%	91%	90%	91%	88%	96%	91%
Evening peak (16:00-19:00)	77%	85%	83%	85%	76%	102%	95%
Evening (19:00-22:00)	75%	81%	84%	88%	82%	98%	93%
Late evening (22:00-01:00)	97%	97%	96%	101%	91%	107%	94%
Whole day	**78%**	**84%**	**84%**	**86%**	**78%**	**98%**	**94%**

Source: TfL Public Transport Service Planning.
Note: The underlying data includes Oyster and contactless payment but not paper tickets.

As with buses, there is least recovery in the Monday and Friday morning peaks (at 70 and 62 per cent, respectively).

In absolute terms, Tuesday and Thursday evening peaks are the busiest three-hour periods. Saturday has recovered the most overall, but in absolute terms remains materially less busy than Mondays and Fridays.

DLR

The DLR connects several areas of inner east London centred around the former Docklands and the Isle of Dogs.

Figure 7   Passenger kilometres and journey stages by DLR, 2013/14–2023/24.
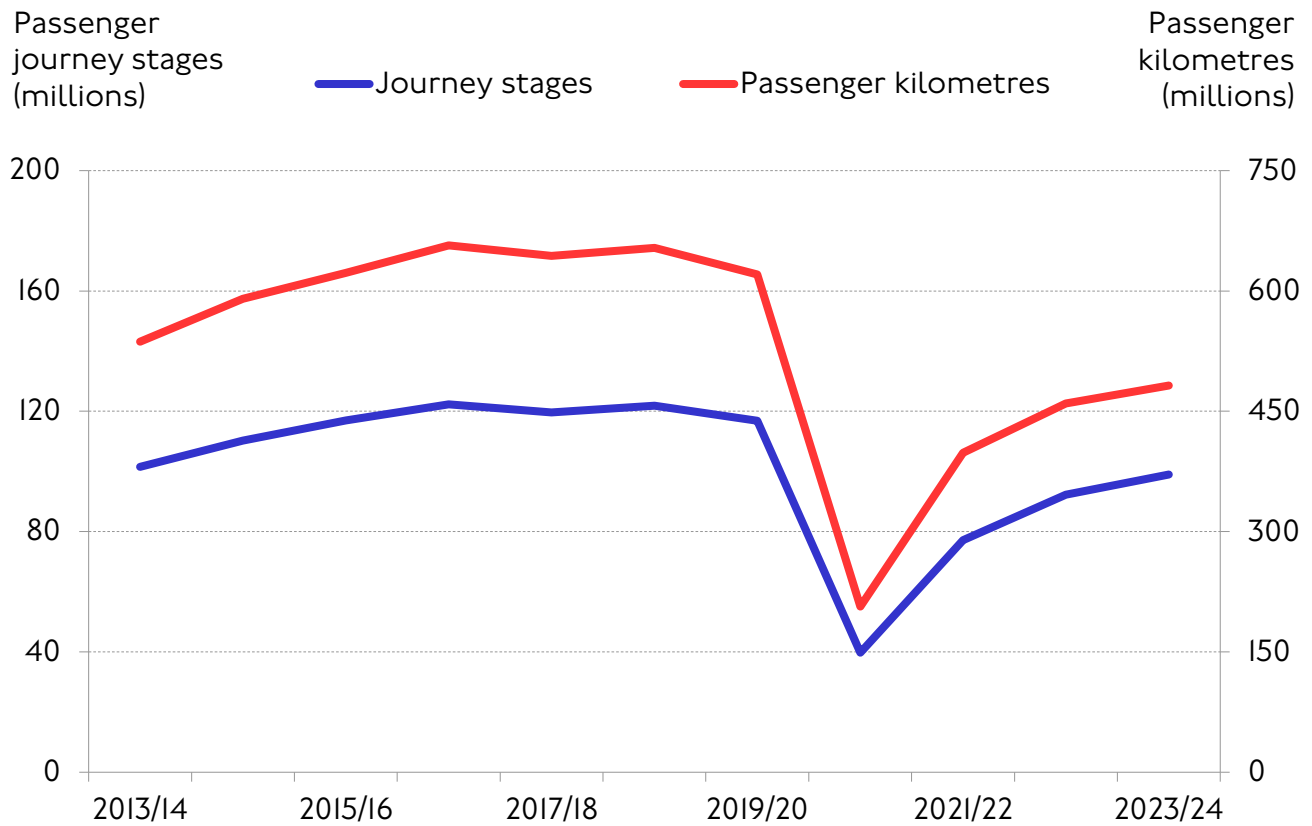
Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
Note: On the DLR, a 'journey stage' is a leg of the trip with no additional validation. Hence, one journey stage may involve several lines when the interchange does not require crossing barriers. However, any 'out-of-station' interchange where validation is required is counted as a new journey stage.

Demand growth on the DLR was tending to level off prior to the pandemic (figure 7), following a rapid expansion of the network (and related increase in demand) over the previous 15-20 years. In 2023/24 the post-pandemic recovery, although slowing, took the level of demand to approximately 85 per cent of the 2019/20 baseline in terms of journey stages and 78 per cent in terms of kilometres travelled, slightly less than the relative recovery seen on buses and the London Underground.
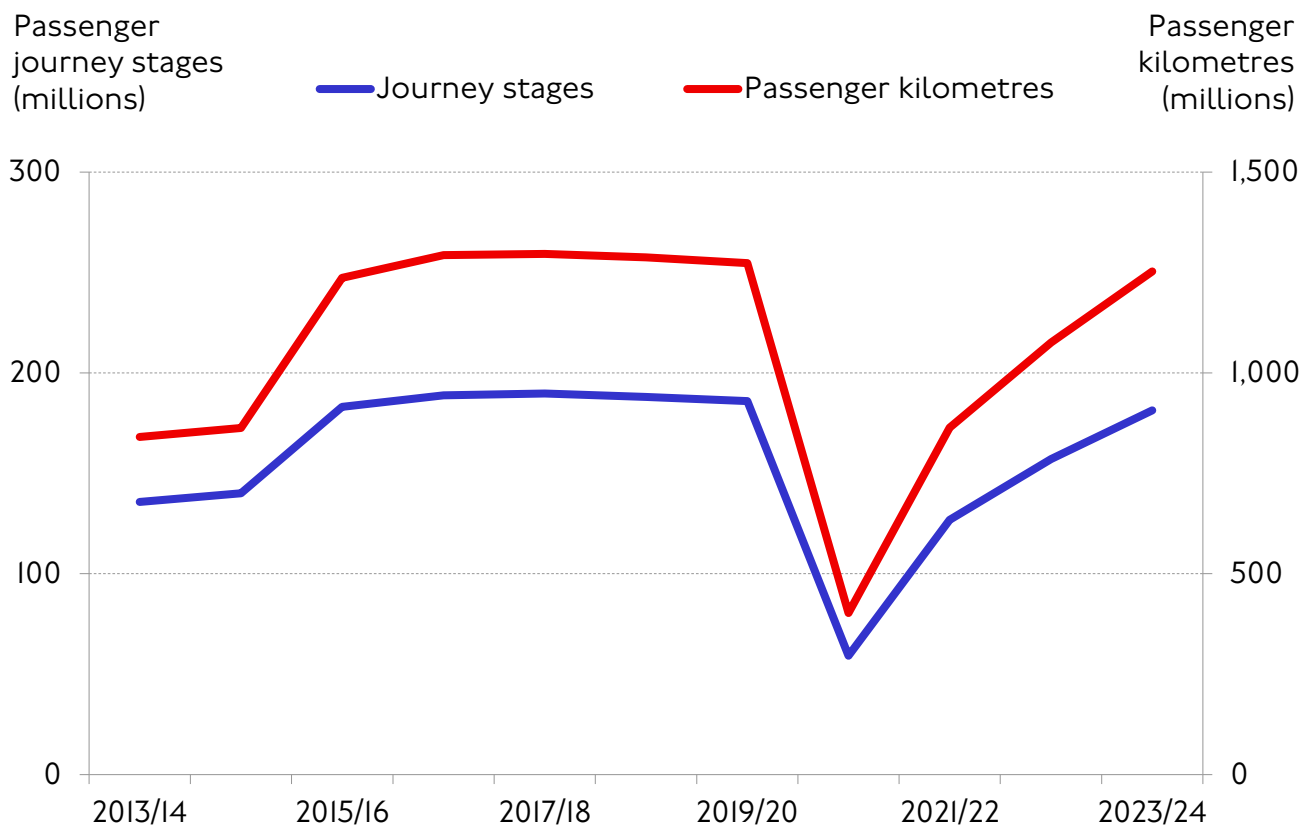
London Overground

The London Overground started operating as a TfL service in November 2007 (mostly using pre-existing railway infrastructure) and is a network of six largely independent lines that operate in inner and outer London.

In 2024, following a manifesto commitment, the Mayor of London announced the re-naming of the six London Overground lines as a way to improve wayfinding and ease passengers' navigation of the network. The new line names (Liberty, Lioness, Mildmay, Suffragette, Weaver and Windrush) celebrate London's rich history and the local heritage of the areas they operate in.

The data below precedes this re-naming (and is therefore not impacted by it) and is for the whole of the London Overground network (all six lines combined).

Figure 8   Passenger kilometres and journey stages by London Overground, 2013/14-2023/24.

Source: Office of Rail and Road.
Note: On London Overground, each train boarding (even within the same trip) is counted as a separate journey stage.

Over the last 10 years, passenger demand on the London Overground has seen three distinct phases (figure 8). Until 2015/16 there was stepped growth in demand following the progressive expansion of services since the London Overground started operating in 2009/10. In the five years prior to the coronavirus pandemic demand stayed at a fairly constant level. After the pandemic, the London Overground saw the strongest recovery and was the quickest of the main modes to approach pre-pandemic levels of demand in early 2023. On average, in 2023/24 demand was two to three per cent below the 2019/20 baseline.

Elizabeth line

The Elizabeth line officially opened in 2022 but from 2015 TfL operated services under the TfL Rail brand on what are now the outer branches of the Elizabeth line (between Reading and Paddington, between Shenfield and Liverpool Street, and from 2018 between Heathrow airport and Paddington).

Figure 9 shows the trends in passenger demand on TfL Rail/Elizabeth line through the various stages of project implementation. While demand on TfL Rail services was growing before the pandemic, the opening of the central section of the Elizabeth line in 2022/23 marked a turning point and in 2023/24 demand continued to grow very strongly, by an estimated 54 per cent from 2022/23 in terms of journey stages and 55 per cent in travelled kilometres. It should be noted, however that these are provisional estimates. TfL is working on an improved method for identifying and attributing journeys which take place on the Elizabeth line.

Figure 9   Passenger kilometres and journey stages on the Elizabeth line (and former TfL Rail services), 2015/16-2023/24.

Source: Office of Rail and Road.
Note: On the Elizabeth line, each train boarding (even within the same trip) is counted as a separate journey stage.
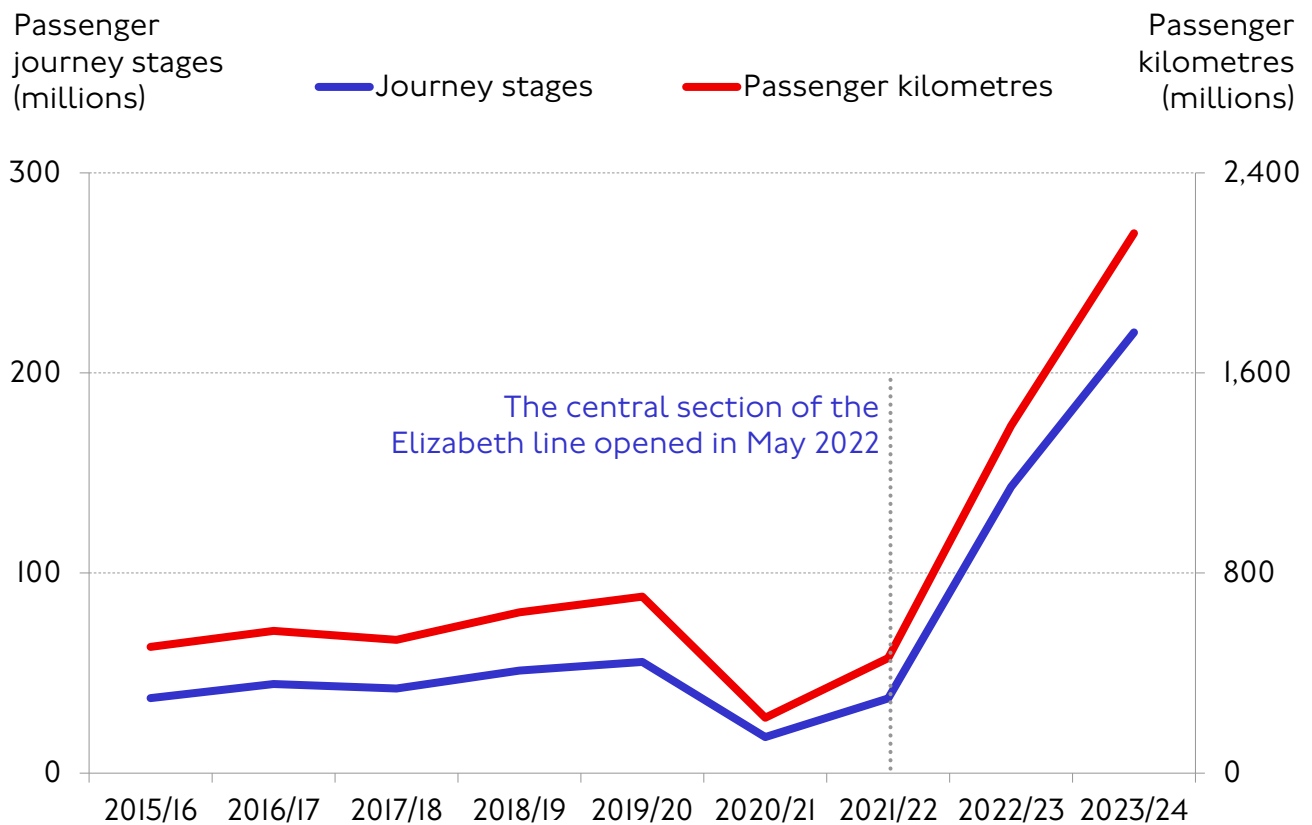
London Trams

London Trams connects Wimbledon, Beckenham and New Addington in south London via Croydon's town centre.

Figure 10   Passenger kilometres and journey stages by London Trams, 2013/14–2023/24.
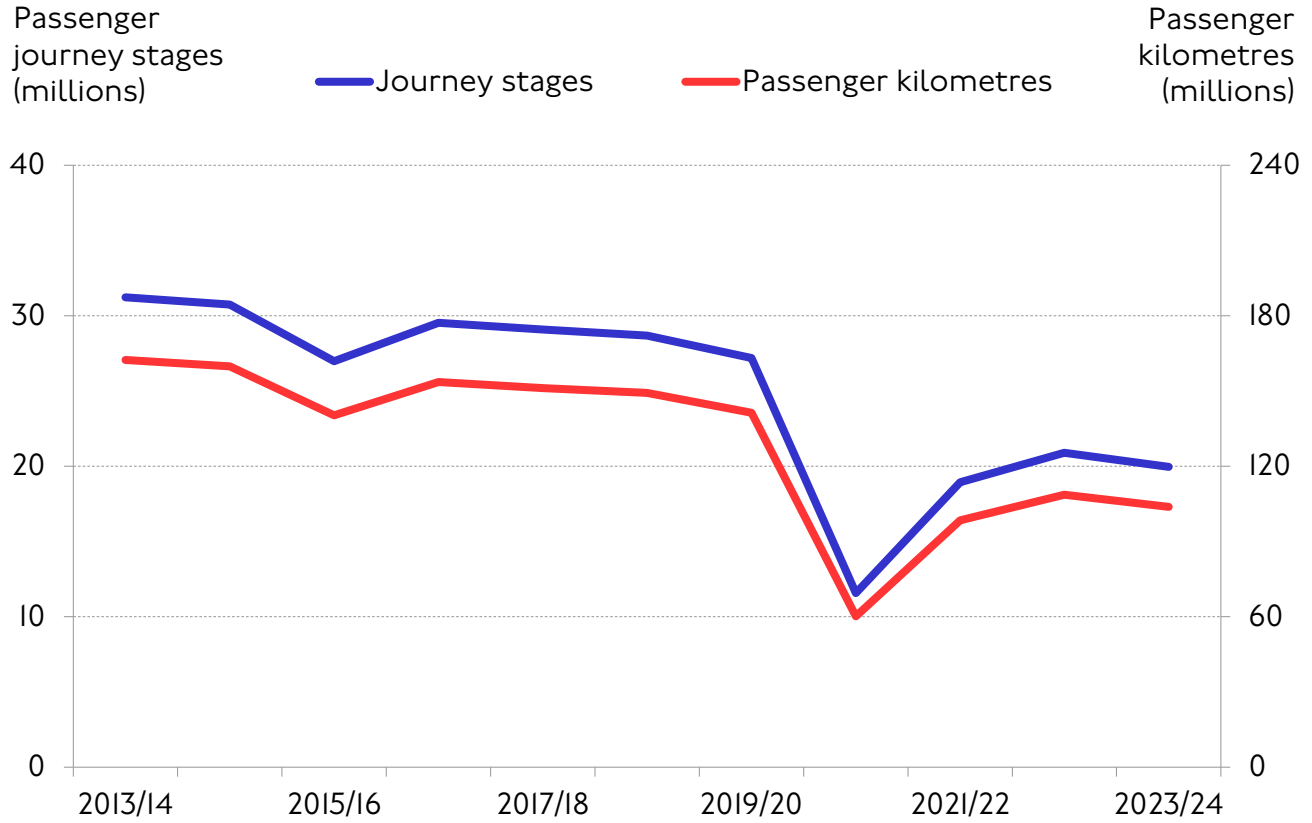
Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
Note: On London Trams, a 'journey stage' is a leg of the trip with no additional validation. Hence, one journey stage may involve several boardings on different vehicles (for example, for different branches).

Passenger demand on London Trams was declining for a few years before the coronavirus pandemic (figure 10). The relative pace of the recovery from the pandemic is also lagging other modes, at 73 per cent of the 2019/20 baseline in 2023/24. This could be partly explained by the operational challenges in 2023/24 (see below).

National Rail in London

Several train operating companies provide National Rail services into and around London. For the purposes of this report, National Rail demand in the London region is assessed using data from franchised London and South East operators as defined by the Office of Rail and Road. This definition includes a certain amount of travel that does not take place strictly within or across the London boundary, due to the nature of the services and the available data.

In the last decade, demand on National Rail London and South East franchised operators followed a trend very similar to that of the London Underground (figure II). Following the pandemic, demand in 2023/24 reached 95 per cent of the 2019/20 baseline in terms of journey stages and 85 per cent in terms of passenger kilometres. This suggests a shift towards (or a faster recovery of) relatively shorter-distance journeys on this mode.

Figure II   Passenger kilometres and journey stages on National Rail London and South East franchised operators, 2013/14-2023/24.
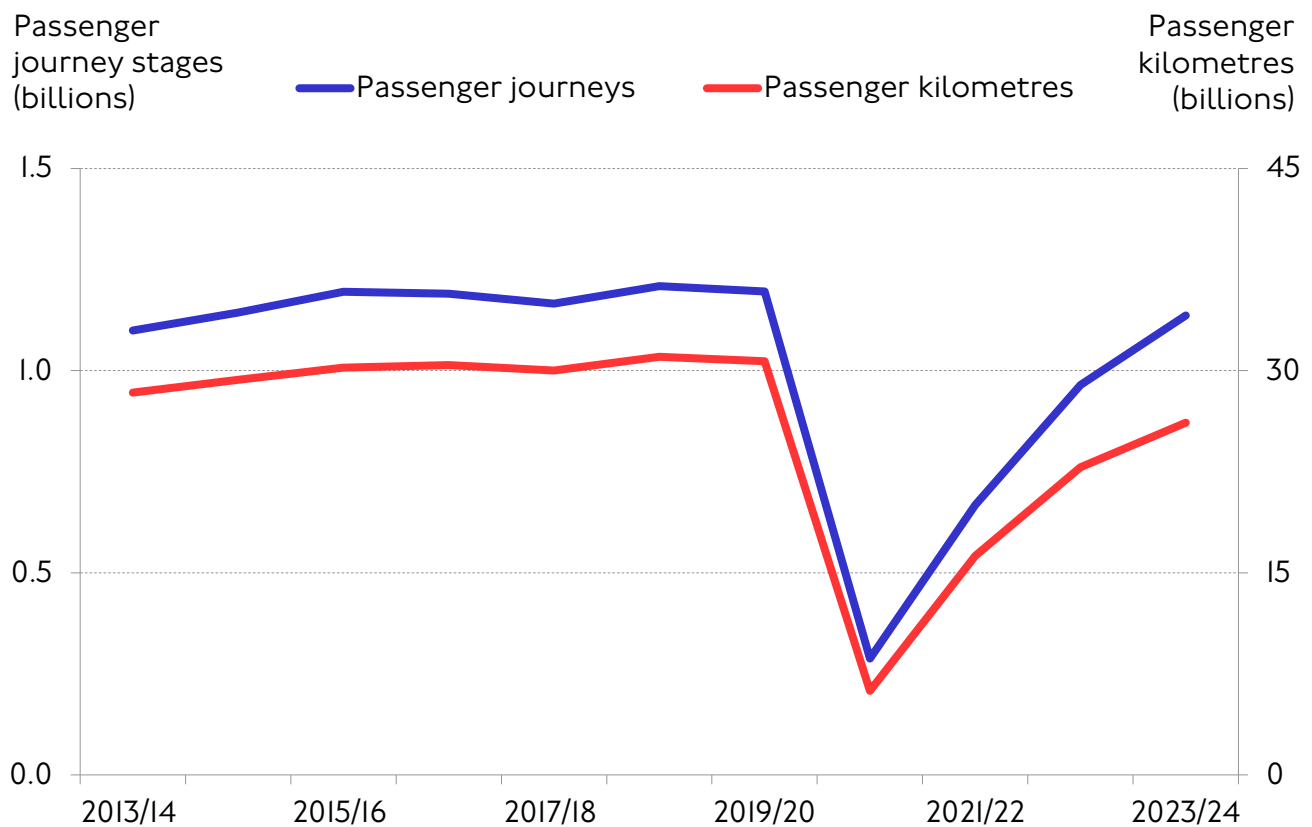

Source: Office of Rail and Road.
Note: On National Rail, each train boarding (even within the same trip) is counted as a separate journey stage.

London River Services

A number of boat services jointly planned by TfL, the Port of London Authority and other stakeholders connect a network of piers along the river Thames.

Figure 12 shows the total number of journey stages on all river services (by type) over the last decade as well as the share of each service over the total.

Figure 12   Journey stages (in millions) on London River Services, by service type, 2013/14-2023/24.
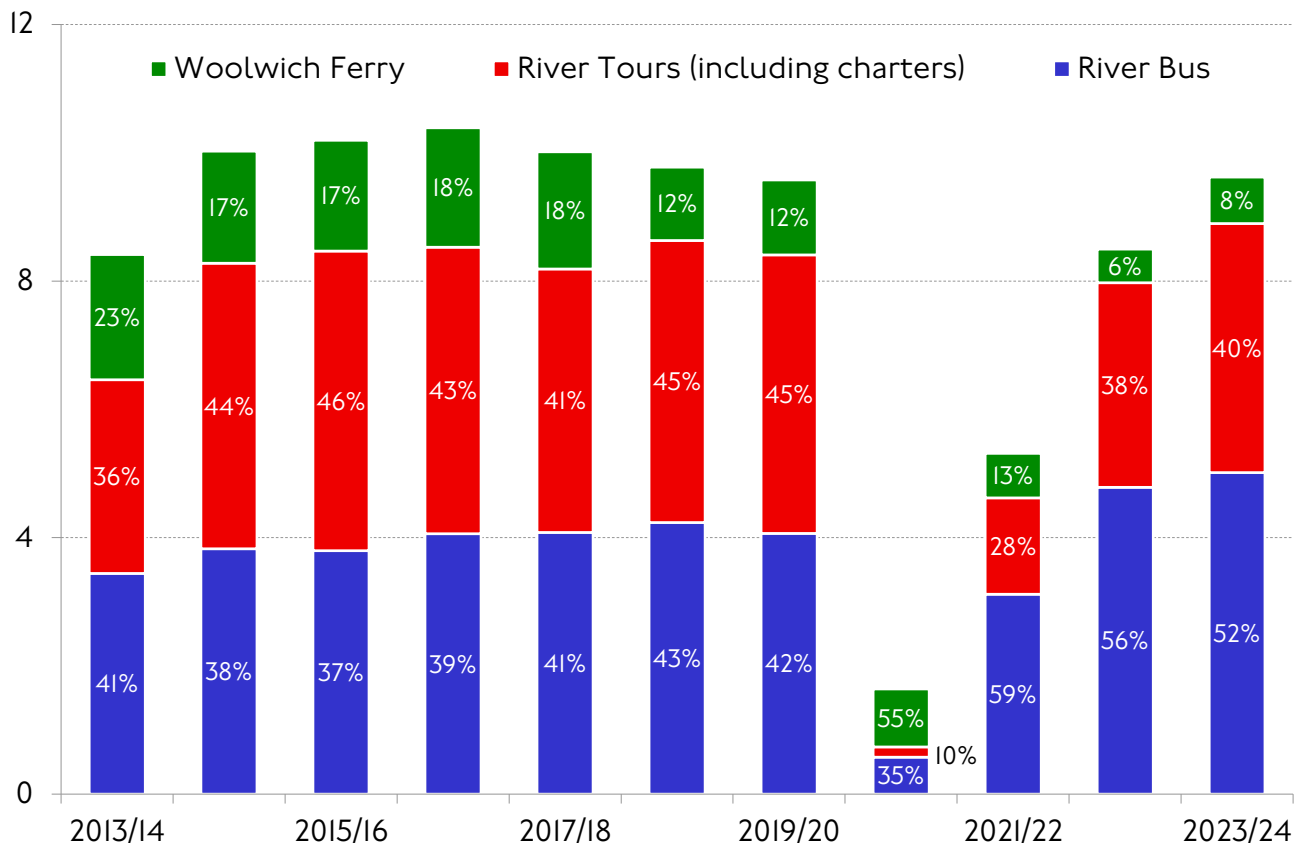
Source: TfL London River Services.
Notes: On river services, each boarding (even within the same trip) is counted as a new 'journey stage'. | In April 2023 the company responsible for providing the hardware to collate passenger numbers on River Tours operators ceased operation. Therefore, a significant portion of the 2023/24 figure for River Tours is estimated based on City Cruises demand and the number of charters compared to last year. | In 2023/24 the Woolwich Ferry increased its scheduled hours of operation and service frequencies across the week.

River Services passenger demand grew until 2016/17 and then slowly decreased to 2019/20. Following the pandemic there has been a strong recovery which in 2023/24 exceeded the pre-pandemic level seen in 2019/20 by 0.5 per cent. This largely reflected increased demand for River Bus and River Tours services.

Over time, the share of demand from River Bus services has tended to increase and now exceeds half of the total. On the other hand, the share of total demand from the other services has tended to decrease over time, particularly for the Woolwich Ferry.

In absolute terms, however, demand on the Woolwich Ferry increased between 2022/23 and 2023/24 (despite ongoing issues with crew availability) although it remains well below the levels seen before the pandemic.

IFS Cloud Cable Car

The IFS Cloud Cable Car connects the Greenwich Peninsula to the Royal Docks across the river Thames in inner east London.

Figure 13   Journey stages (in millions) on the IFS Cloud Cable Car, 2013/14-2023/24.
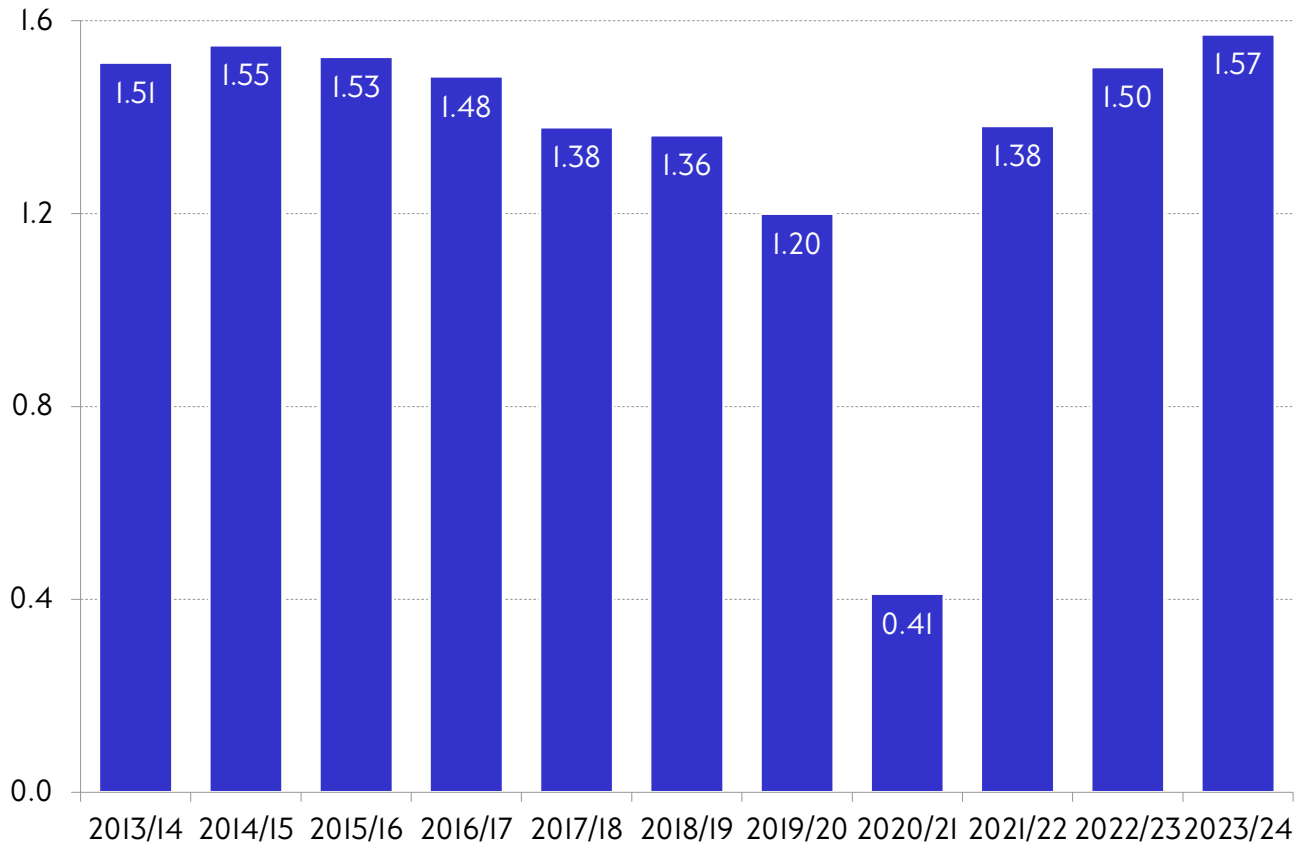
Year	Value
2013/14	1.51
2014/15	1.55
2015/16	1.53
2016/17	1.48
2017/18	1.38
2018/19	1.36
2019/20	1.20
2020/21	0.41
2021/22	1.38
2022/23	1.50
2023/24	1.57

Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
Notes: On the IFS Cloud Cable Car, each boarding is counted as a new 'journey stage'.

Over the last decade (figure 13), prior to the coronavirus pandemic, demand on the IFS Cloud Cable Car service was steadily declining. However, it very quickly recovered from the pandemic and in 2021/22 was already exceeding the pre-pandemic levels from 2019/20.

Public transport service provision and operational performance by mode

This section describes the trends in selected indicators of service provision and operational performance for each of the main TfL-operated public transport modes in London over the last 10 years.

Bus

Selected measures of bus service provision (in terms of scheduled kilometres) and overall performance (as operated kilometres and average speed) over the last decade are summarised in table 7.

Table 7   Bus service provision and reliability, 2013/14-2023/24.

Year	Scheduled kilometres (millions)	Scheduled kilometres operated	Scheduled kilometres lost to congestion	Scheduled kilometres lost to other causes	Average speed (mph)
2013/14	502	97.7%	1.9%	0.4%	9.6
2014/15	504	97.1%	2.0%	0.9%	9.5
2015/16	507	97.2%	2.3%	0.5%	9.3
2016/17	508	97.4%	2.0%	0.6%	9.2
2017/18	500	98.1%	1.4%	0.5%	9.3
2018/19	491	98.1%	1.3%	0.5%	9.3
2019/20	486	97.8%	1.5%	0.7%	9.3
2020/21	471	98.7%	1.5%	0.5%	10.3
2021/22	486	97.9%	1.2%	0.9%	9.6
2022/23	478	96.0%	1.5%	2.5%	9.4
2023/24	473	96.9%	1.9%	1.2%	9.3

Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
1: Includes other lost kilometres outside the control of the operator.
2: Includes all lost kilometres within the control of the operator, including mechanical and staff reasons.

As part of TfL's continuous review of bus services to respond to demand changes and seek efficiencies on the bus network, service provision (in terms of scheduled bus kilometres) decreased again by one per cent in 2023/24. This represents a reduction of six per cent from the 2013/14 level (seven per cent from the high point in 2016/17).

However, performance (measured as the proportion of scheduled kilometres operated) improved in 2023/24 for the first time since the coronavirus pandemic, by 0.9 percentage points from 2022/23. This was largely thanks to a large reduction (of 1.3 percentage points) in the proportion of scheduled kilometres lost to causes other than congestion (which

include mechanical and staff reasons), and despite an increase in the proportion of scheduled kilometres lost to congestion, which increased by 0.4 percentage points.

The average bus speed continued to decrease slightly in 2023/24 (by 1.6 per cent), but this is the level that was seen in the years before the coronavirus pandemic, which likely reflects the recovery of road traffic and congestion towards its pre-pandemic levels.

Table 8 provides additional selected reliability metrics focusing separately on high- and low-frequency bus services.

Table 8   Bus punctuality and reliability by service type, 2013/14-2023/24.

Year	High frequency Actual average wait time (min)[1]	High frequency Excess average wait time (min)[1]	High frequency Journey time metric (min)[1,2]	Low frequency Timetabled services on time[3]
2013/14	5.9	1.0	-	82.5%
2014/15	6.0	1.1	-	81.8%
2015/16	6.1	1.2	-	80.6%
2016/17	6.1	1.1	-	80.1%
2017/18	6.0	1.0	32.4	82.3%
2018/19	6.1	1.0	32.5	82.3%
2019/20	6.2	1.0	32.2	83.3%
2020/21	6.1	0.6	30.5	89.5%
2021/22	6.1	0.9	31.7	84.4%
2022/23	6.5	1.2	34.0	81.5%
2023/24	6.6	1.2	34.1	80.0%

Source: TfL Strategic Analysis, Customer & Strategy, based on Public Transport Service Planning and TfL service performance data.
1: This metric represents only high-frequency services (those operating with a scheduled frequency of five or more buses per hour).
2: The figures shown on this table were calculated using demand estimates from 2019. From 2023/24, it was possible to calculate equivalent figures using 2022 demand estimates. These have not been provided here because they cannot be compared on a like-for-like basis with the results prior to 2022/23 but they will be provided in future Travel in London reports.
3: This metric is defined only for low-frequency services (those operating with a scheduled frequency of less than five buses per hour). Buses are defined as 'on time' if departing between 2.5 and 5.0 minutes after their scheduled departure times.

In addition to the customer journey time (briefly discussed above), actual and average wait time are other good indicators of reliability for high-frequency services from a passenger perspective. In 2023/24, all three indicators deteriorated slightly, with actual average wait time increasing by 0.1 minutes (2.0 per cent), average excess time by 0.04 minutes (3.5 per cent), and customer journey time by 0.1 minutes (0.2 per cent).

The reliability of low-frequency bus services also slightly deteriorated, with a reduction of 1.5 percentage points in the proportion of timetabled services on time, down to 80 per cent of all low-frequency services.

These results likely reflect multiple factors such as changes in service provision and the increase in traffic and congestion that may lead to a reduction in bus speeds.

London Underground

A summary of service provision and operational performance metrics for the London Underground over the last 10 years is given in table 9.

Table 9   London Underground service provision and reliability, 2013/14-2023/24.

Year	Scheduled kilometres (millions)	Operated kilometres (millions)	Scheduled kilometres operated	Service operated[1]	Journey time metric (min)[2]
2013/14	78.2	76.2	97.5%	-	-
2014/15	82.3	80.3	97.6%	-	-
2015/16	84.5	82.4	97.5%	-	-
2016/17	86.3	83.7	96.9%	-	-
2017/18	87.3	84.3	96.6%	-	-
2018/19	87.8	85.0	96.8%	96.7%	29.0
2019/20	87.7	82.4	94.0%	92.7%	29.1
2020/21	83.3	72.6	87.2%	83.3%	25.0
2021/22	84.9	74.9	88.2%	88.5%	26.9
2022/23	87.5	77.3	88.3%	90.1%	27.8
2023/24	86.3	78.3	90.8%	90.9%	28.3

Source: TfL Strategic Analysis, Customer & Strategy, based on Public Transport Service Planning and TfL service performance data.
1: The service operated metric compares the actual versus the scheduled number of train trips over time using a predetermined set of measuring points. The schedule includes adjustments for planned closures, weekend engineering works and timetable notices.
2: See note 2 on table 8.

In 2023/24, London Underground's service provision (in terms of scheduled kilometres) went down by 1.4 per cent from 2022/23, albeit to a level not dissimilar from previous years either side of the pandemic. However, the proportion of scheduled kilometres operated (as well as the proportion of service operated), despite seeing small year-on-year improvements since 2022/23, were still lagging significantly in 2023/24 compared to the typical pre-pandemic levels of reliability of around 96-97 per cent. The passenger-focused journey time metric showed a small deterioration in 2023/24, increasing by 0.5 minutes (1.8 per cent) to 28.3 minutes.

This operational performance reflected a combination of staffing and infrastructure difficulties, which is in part a legacy of the pandemic (which also delayed several upgrade projects). Moreover, the deteriorating asset condition on the Central and Bakerloo lines in particular is currently giving cause for concern, pending large-scale renewal of the ageing train fleets.

DLR

Table 10 summarises selected indicators of service provision and reliability for the DLR over the last 10 years.

Table 10   DLR service provision and reliability, 2013/14-2023/24.

Year	Operated kilometres (millions)	Scheduled services operated	Excess wait time (min)	Network availability measure[1]	Journey time metric (min)[2]
2013/14	5.8	99.2%	0.08	98.6%	-
2014/15	5.8	99.3%	0.07	99.1%	-
2015/16	5.9	98.5%	0.09	99.2%	-
2016/17	6.0	99.0%	0.10	99.1%	-
2017/18	6.1	98.4%	0.11	98.0%	-
2018/19	6.1	99.0%	0.09	99.1%	21.2
2019/20	6.1	99.0%	0.11	99.1%	20.9
2020/21	5.1	99.3%	0.08	99.0%	20.8
2021/22	5.2	98.5%	0.11	98.4%	21.4
2022/23	5.7	98.3%	0.13	98.6%	21.3
2023/24	6.3	98.3%	0.12	95.3%	20.6

Source: TfL Strategic Analysis, Customer & Strategy, based on Public Transport Service Planning and TfL service performance data.
1: The network availability measure accounts for the geographical extent and the duration of planned closures and, with appropriate weightings, provides an estimate of how much of the network is available for customers (100 per cent represents the whole DLR network open for all service hours).
2: See note 2 on table 8.

In 2023/24, actual service provision (in terms of train kilometres operated) saw a large increase from 2022/23 (10.3 per cent) to 6.3 million kilometres, a result of the full-year effects of restoring the pre-pandemic service between September 2022 and May 2023.

Over the same period, performance levels were largely maintained or improved, with little change in the proportion of scheduled services operated and small reductions in excess wait time (of 0.01 min or 9.2 per cent) and the journey time metric (by 0.7 min or 3.3 per cent). The only exception was network availability, which deteriorated slightly by 3.3 percentage points as a result of an increase in planned closures, primarily for enabling

works in preparation for the new train fleet, which included major works at Beckton depot.

London Overground

Trends in the key metrics of London Overground service provision and reliability over the last decade are shown in table 11.

Table 11 London Overground service provision and reliability, 2013/14-2023/24.

Year	Operated train kilometres (millions)	Public Performance Measure (PPM) – annual average[1]	Journey time metric (min)[2]
2013/14	7.9	95.8%	-
2014/15	7.9	95.0%	-
2015/16	10.0	94.4%	-
2016/17	9.9	94.5%	-
2017/18	10.2	94.4%	-
2018/19	10.8	93.8%	32.9
2019/20	10.7	92.6%	32.8
2020/21	9.4	96.2%	30.7
2021/22	11.0	95.2%	30.8
2022/23	10.7	93.5%	30.6
2023/24	11.3	93.6%	30.1

Source: TfL Strategic Analysis, Customer & Strategy, based on Office of Rail and Road and Public Transport Service Planning data.
1: See note 1 on table 3.
2: See note 2 on table 8.

Like the DLR, in 2023/24 the London Overground's actual service provision (in terms of train kilometres operated) reached a record level of 11.3 million train kilometres, following a 5.9 per cent increase from 2022/23.

During this period, the key performance indicators shown on the table also saw improvements, with the Public Performance Measure seeing a 0.1 percentage point increase and the journey time metric a 0.5 minutes (1.6 per cent) decrease.

Elizabeth line

Similar service provision and reliability indicators for the Elizabeth line since its TfL-operated predecessor (TfL Rail) started service are summarised in table 12.

Table 12   Elizabeth line (and former TfL Rail) service provision and reliability, 2015/16–2023/24.

Year	Operated train kilometres (millions)	Public Performance Measure (PPM) – annual average[1]	Journey time metric (min)[2]
2015/16	2.3	91.4%	-
2016/17	2.7	91.8%	-
2017/18	2.8	89.8%	-
2018/19	4.1	93.8%	-
2019/20	5.0	95.2%	-
2020/21	6.2	96.0%	-
2021/22	8.3	94.2%	-
2022/23	10.1	92.8%	25.8[3]
2023/24	11.8	88.0%	25.4

Source: TfL Strategic Analysis, Customer & Strategy, based on Office of Rail and Road and Public Transport Service Planning data.
1: See note 1 on table 3.
2: See note 2 on table 8.
3: See note 4 on table 4.

While actual service provision continued to increase in 2023/24 (by 17.4 per cent from the previous year) following the consolidation of the latest, full timetable and level of service (introduced in May 2023), the Elizabeth line suffered from a series of reliability issues in 2023/24, particularly on Network Rail infrastructure on the western branch towards Reading. This is reflected in the value of the Public Performance Measure of 88 per cent, which was 4.8 percentage points lower than in 2022/23.

London Trams

A summary of service provision and reliability indicators on London Trams over the last 10 years is shown in table 13.

Table 13   London Trams service provision and reliability, 2013/14-2023/24.

Year	Scheduled kilometres (millions)	Operated kilometres (millions)[1]	Scheduled services operated	Journey time metric (min)[2]
2013/14	3.06	3.03	98.9%	-
2014/15	3.03	3.01	97.9%	-
2015/16	3.07	3.04	99.0%	-
2016/17	3.30	3.20	97.1%	-
2017/18	3.35	3.30	98.5%	-
2018/19	3.28	3.23	98.5%	19.7
2019/20	3.25	3.19	98.2%	20.1
2020/21	3.07	3.02	98.3%	20.0
2021/22	3.21	3.16	98.5%	19.6
2022/23	3.23	2.98	92.2%	20.8
2023/24	3.00	2.81	93.6%	21.6

Source: TfL Strategic Analysis, Customer & Strategy, based on Public Transport Service Planning and TfL service performance data.
1: Operated kilometres exclude replacement bus services operated during periods of track repair works. Values for 2016/17 were affected by the tragic Sandilands incident.
2: See note 2 on table 8

The year 2023/24 (especially its second half) was particularly challenging for London Trams, whose service was severely impacted by more than 45 days of engineering work closures, one day of industrial action and more than 25 service suspensions. In addition, ageing assets were leading to ongoing reductions in tram availability and causing delays and cancellations, which were however necessary to help maintain the safety and reliability of the network.

As a result, most performance indicators saw a deterioration in 2023/24 with respect to 2022/23, with a 7.1 per cent decrease in scheduled kilometres, 5.7 per cent decrease in operated kilometres and a 3.8 per cent increase (0.8 minutes) in the journey time metric. Only the proportion of scheduled services operated saw a small improvement, of 1.4 percentage points.

Focus on Superloop

Superloop is the brand name of a new network of 10 express bus routes (of which nine are currently in operation) that connects key outer London town centres and transport hubs, offering improved connections and journey times (figure 14).

The current Superloop stretches 179 kilometres (of which 138 kilometres are for the outer London 'loop' only) and connects 23 boroughs, providing interchanges with 310 other TfL bus routes and 23 rail lines across 49 rail stations.

This section explores the key demand trends on these new services since the first routes were launched in July 2023.

Figure 14   Map of the Superloop network.

Source: Transport for London.

Background

The creation of the Superloop network follows the strategic priorities set out in the Bus Action Plan that TfL published in March 2022, whose vision included expanding the outer London bus network and trialling new services as two of several ways to support the overall goal of attracting more customers to the bus network, improving performance by increasing bus priority and minimising delays caused by planned roadworks.

The current Superloop network (see figure 14) was delivered in two phases:

- **Phase 1**, delivered between July and August 2023, focused on creating the Superloop brand by re-naming four existing express routes and enhancing their identity through a new bus livery (in white and red, which stands out from the traditional full red design of conventional London buses), new signage at stops and bespoke marketing. These first four Superloop routes were:
  - SL6 (formerly X68), a Monday to Friday peak time only service between Russell Square and West Croydon via West Norwood, Waterloo and Holborn
  - SL7 (formerly X26), between West Croydon and Heathrow airport via Sutton, Worcester Park, Kingston, Teddington and Hatton Cross
  - SL8 (formerly 607), between Uxbridge and White City via Ealing Broadway, Ealing Common, Acton Central and Shepherds Bush
  - SL9 (formerly X40) between Heathrow Airport and Harrow via Northolt station

- **Phase 2**, delivered between November 2023 and March 2024, consisted in the introduction of five new routes to complete the outer London 'loop', namely:
  - SL1 between North Finchley and Walthamstow via Arnos Grove, Silver Street and New Southgate
  - SL2 between Walthamstow Central and North Woolwich via Gants Hill, Ilford, Barking, Gallions Reach and King George V
  - SL3 between Thamesmead and Bromley North via Abbey Wood, Bexleyheath, Sidcup and Bickley
  - SL5 between Bromley North and Croydon via East Croydon and Bromley South
  - SL10 between Harrow and North Finchley via Kenton, Kingsbury, Hendon Central and Finchley Central

Route SL4, between Canary Wharf and Grove Park, will be the last of this initial programme to open once the forthcoming Silvertown tunnel opens in 2025. Beyond this, additional routes may be added to the Superloop network in the future following consultation with all relevant stakeholders.


Demand trends

Overall, the introduction of Superloop services has had a positive impact on bus demand. Although bus patronage is affected by seasonal variations, general traffic and other factors, Superloop routes are generally showing better demand outcomes than the rest of the bus network. This is reflected in Superloop demand mostly growing over time (and relatively more than the bus network average) and, when there have been decreases in demand, these being relatively smaller than on the bus network as a whole.

Figure 15 shows the weekly average demand on each of the Superloop routes since the first routes launched in summer 2023.

A few main conclusions immediately stand out from this graph:

- Firstly, there is a wide range in the absolute level of demand across each of the nine existing routes. SL8 is by far the busiest (also the one with the highest service frequencies), followed by SL9. Demand on the remaining routes is more similar except for SL6, which has the lowest patronage, likely as a result of being a peak service only.
- Secondly, demand on each route follows the expected seasonal fluctuations but otherwise has remained quite stable or increased slightly since each route was introduced.
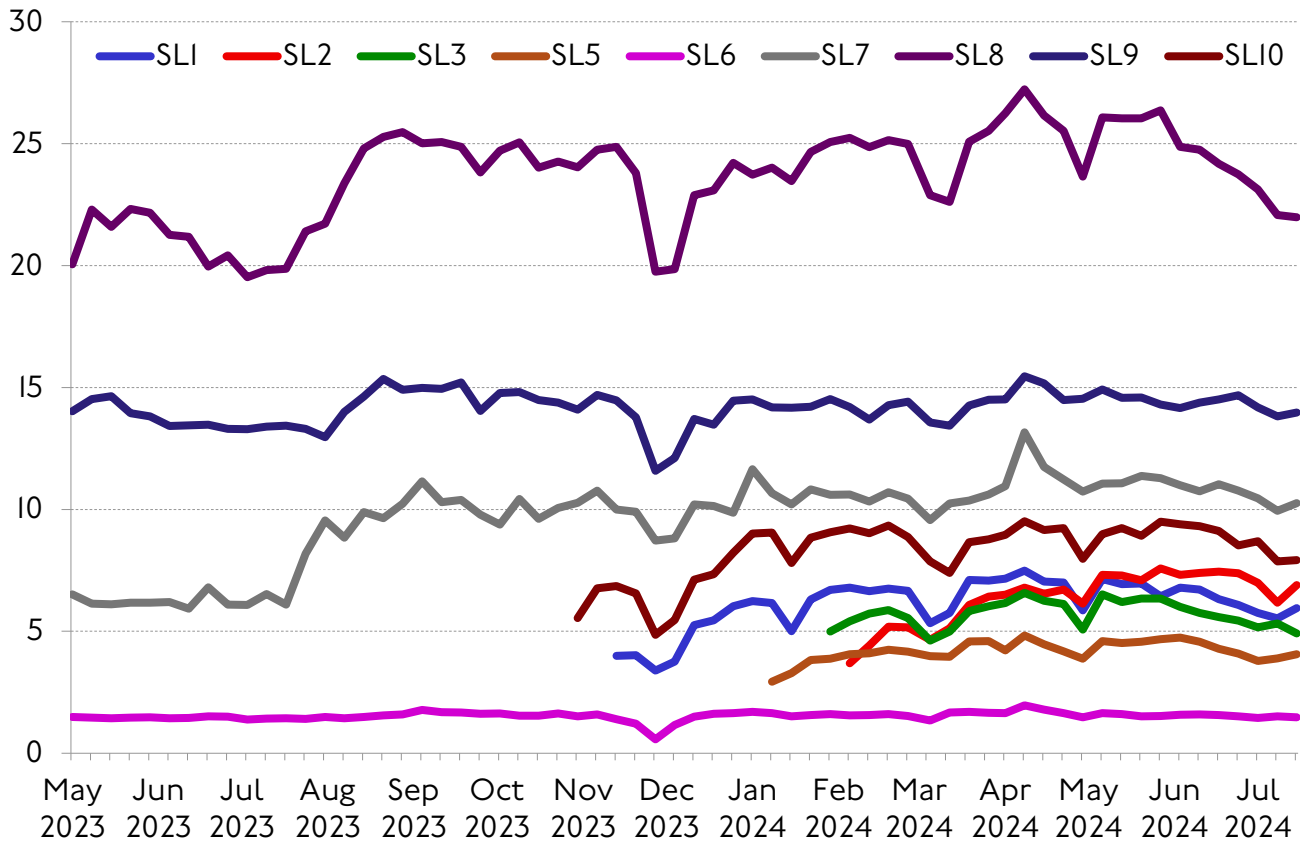
Source: TfL Public Transport Service Planning.

Demand abstraction from parallel routes

Research shows that an increase in service quality following changes in service levels, information provision or other enhancements tends to increase passenger demand for that service. When, as in the Superloop case, these enhancements occur only on some of the routes alongside a corridor shared with other services, passengers may switch from parallel bus routes to use the enhanced service. Therefore, it is important to look at patronage along whole corridors when assessing the demand impacts of a scheme like Superloop.

The main findings of a corridor-level analysis looking at the changes in demand on bus services parallel to the Superloop routes (where bus stops are within 400 metres of a Superloop route) are as follows:

• For **phase 1** routes, which have now been in place for more than a year, it was possible to look at year-on-year changes in demand on the routes themselves as well as on parallel routes and the whole corridor. Using the equivalent weeks from one year to the next and taking an average over four consecutive weeks mitigates for much of the seasonal variation and provides like-for-like indicative comparisons. The main finding across all four routes in phase 1 (SL6, SL7, SL8 and SL9) is that demand on the Superloop services has increased over the last year (by between 5 and 18 per cent) and although there has been some abstraction from parallel routes (whose patronage has decreased slightly between three and 7 per cent), the net effect

on all but one corridors has been of a net increase in bus demand on the corridor of between one and four per cent.

- **Phase 2** routes have not yet been in operation for a full year and it is therefore not possible at this stage to conduct the same kind of comparisons. It is nevertheless possible to compare the change in demand from the time that each route started operations until the most recent data available with the change seen across the whole bus network over the same period. The main conclusion is that corridors with Superloop bus services are seeing better demand outcomes than the bus network as a whole. That is, where demand on the bus network has increased over the period of analysis, it has increased even more on the Superloop route itself and in most cases also on that route's corridor. And when demand on the bus network has decreased over the period of analysis, it has either decreased less or sometimes increased on the Superloop routes and corridors.

Service provision and operational performance trends

All nine Superloop routes operate at least a four buses per hour daytime service throughout the week, with most routes offering five buses per hour from Monday to Saturday and SL8 operating six buses per hour Monday to Saturday. At present, the Superloop does not offer services through the night.

A combination of factors such as shorter wait times, new direct connections and quicker on-board journeys has led to substantial reductions in customer journey time since the launching of the Superloop network. For illustration, table I4 shows some examples of these reductions on selected sections of the network.

Table I4   Weekday daytime journey time reductions since the introduction of Superloop services on selected sections of the network.

Route	Section	Journey time reduction
SLI	Walthamstow to Arnos Grove	21-27%
SL2	Walthamstow to Bell Corner and Ilford station	5-19%
SL2	Barking town centre to Gallions Reach	50-57%
SL3	Bexleyheath Library to Bromley, Widmore Road	10-20%
SL5	East Croydon to Bromley South station	25-37%
SLI0	Hendon station to Harrow bus station	21-28%

Source: TfL Public Transport Service Planning.

In terms of operational performance, about half of the Superloop routes are performing well and in line with expectations, while there are local issues on the others related to roadworks, vehicle reliability and scheduling. In all cases, improvement plans have been put in place to make operational changes to try to improve these outcomes.

Table I5 shows selected performance indicators (excess wait time for high-frequency services and proportion of services on time for the low-frequency SL6 route) for all Superloop routes for which data is available, alongside the minimum standard specified to operators (shown in brackets at the top).

Table I5   Excess wait time (in minutes) on high-frequency Superloop services and proportion of services on time on low-frequency Superloop services (SL6 only), four-weekly average, financial period 7 2023/24-period 3 2024/25.

Period	SL1 (MS[1]=1.10)	SL3 (MS=1.00)	SL7 (MS=1.30)	SL8 (MS=1.10)	SL9 (MS=1.20)	SL10 (MS=1.10)	SL6 (MS=78%)
P7 2023/24	-	-	-	1.70	1.63	-	73.06%
P8 2023/24	-	-	-	1.82	1.84	-	74.58%
P9 2023/24	-	-	-	2.23	1.87	0.89	65.12%
P10 2023/24	0.99	-	-	1.62	0.93	0.71	69.60%
P11 2023/24	0.94	-	-	1.68	1.26	0.55	72.83%
P12 2023/24	1.01	1.65	-	1.00	1.08	0.89	66.28%
P13 2023/24	1.09	1.82	1.31	1.37	1.26	0.60	64.22%
P1 2024/25	0.84	1.44	0.98	1.46	1.13	0.79	72.44%
P2 2024/25	1.13	1.07	1.06	1.26	1.35	0.56	66.25%
P3 2024/25	1.12	0.84	0.97	1.74	1.26	0.81	65.87%

Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.
1: MS: minimum standard, the benchmark that operators are expected to meet. For excess wait time, the minimum standard acts as a maximum, while for the proportion of services on time it acts as a minimum.

Table I6 further shows the proportion of scheduled kilometres operated on the Superloop services for which data is available. In this case, the minimum standard for all routes is 98 per cent.

Table I6   Proportion of scheduled kilometres operated on Superloop services, financial period 11 2023/24-period 3 2024/25.

Period	SL1	SL3	SL7	SL8	SL9	SL10	SL6
P11 2023/24	98.33%	-	96.95%	96.35%	96.27%	99.50%	98.93%
P12 2023/24	98.05%	96.34%	97.66%	99.11%	97.33%	98.51%	99.35%
P13 2023/24	97.21%	94.85%	98.10%	97.50%	95.70%	99.09%	99.55%
P1 2024/25	97.41%	95.92%	98.69%	96.53%	96.67%	96.93%	99.87%
P2 2024/25	96.55%	97.54%	98.50%	98.75%	93.85%	99.74%	99.01%
P3 2024/25	97.88%	98.58%	98.92%	95.42%	95.31%	97.75%	99.40%

Source: TfL Strategic Analysis, Customer & Strategy, based on TfL service performance data.

In terms of the proportion of scheduled kilometres operated there has been period-to-period variability across all routes, but in general there are no major performance issues, with all routes showing very high proportions of scheduled kilometres operated.

Customer experience and passengers' perceptions

As well as new bus services, enhanced frequencies and reduced journey times, Superloop offers other enhancements to the customer experience. These include:

- New and improved branding on Superloop stops and shelters that make them stand out and be more easily recognisable. This includes shelter toppers, red e-tiles detailing the route numbers and Superloop name tags.
- The addition of live arrival information to many of the shelters to keep passengers informed of when the next bus will arrive.
- A new and unique white and red livery to make Superloop buses distinguishable from other TfL bus services. This new livery also includes a schematic map that shows the key stopping locations on each route.
- USB charging points have been fitted on all Superloop vehicles.

Perception surveys were carried out in November 2023 and May 2024 to understand how passengers were responding to the concept and branding of Superloop shortly after the completion of each of the two main phases.

- The first wave of surveys in November 2023 targeted passengers of phase I routes (SL6, SL7, SL8 and SL9) and showed positive results, with over 90 per cent of customers being spontaneously aware (without prompts) of the name and route they were using, and up to 99 per cent when prompted.
- On the second wave, conducted in May 2024 to understand passengers' responses to the phase 2 routes (SLI, SL2, SL3, SL5 and SLI0), prompted awareness of Superloop was 92 per cent, although unprompted awareness was much lower (44 per cent) at the time of the surveys. This may reflect the fact that the time elapsed since completion of phase 2 (March 2024) until the time of the survey was only two months (compared to four months for the phase I surveys) and that phase 2 routes were completely new, while phase I routes were pre-existing express bus services with a consolidated customer base.
- Furthermore, 88 per cent of respondents considered that Superloop services were better than other buses and 93 per cent said that they would use the service again, with 90 per cent stating that the introduction of Superloop showed that TfL cares about its customers.

Overall, therefore, Superloop is a widely recognised TfL product that is valued by passengers, as shown both on the perception surveys and the positive patronage outcomes.