

Value for Money on London's Transport

Tender briefing

About London TravelWatch

London TravelWatch is the official independent watchdog set up to advocate for people travelling in and around London. We are sponsored and funded by the London Assembly, which is part of the Greater London Authority, and is independent from transport operators. Our sister organisation, Transport Focus, covers the rest of Great Britain.

London TravelWatch promotes integrated transport policies and presses for better journeys for everyone, with higher standards of quality, performance and accessibility. We work directly with users, other transport user groups as well as transport operators, providers, regulators and local authorities. In turn, transport operators consult us on proposed changes to services or closures of lines or stations.

We cover all forms of Transport for London (TfL) services, National Rail in and around London, and those who walk, cycle or wheel in the capital. You can find out more about us [on our website](#).

Project overview and context

We know public transport is an important part of people's lives, yet as seen through our casework, news stories and external data sources, not everyone is happy with the services they are receiving.

Part of what is driving this is whether passengers feel they are getting good value for money (VfM) from services. Previous National Rail Passenger Survey results show that this remained a sticking point. This was particularly the case in London and the South East, where just 45% of passengers were satisfied with VfM, compared with 55% for long distance services and 53% for regional services.¹

TfL's customer care survey suggests that people are slightly more satisfied with VfM on their services compared to rail, with 55% of respondents agreeing that TfL provides good value for money to fare payers.² However, there is still clearly significant room for improvement, and this issue remains important regardless of the type of transport.

Despite the different passenger perspectives on VfM on TfL and National Rail services, we would expect there to be similar drivers shaping passengers' views, from affordability and fare levels to reliability, frequency and journey time.

To inform this, earlier this year we commissioned a consultancy to produce a report reviewing, synthesizing and evaluating the existing knowledge base. The findings

¹ National Rail Passenger Survey, Spring 2020 - [Main-Report-Spring-2020.pdf](#)

² [Customer, Sustainability and Operations Panel Agenda and Papers 2 October 2024](#)

made clear there is no simple yes or no answer to the question of whether transport in London offers good VfM, and that it is determined by both affordability and quality of service. In turn, there is clearly no simple solution to increasing the VfM people get from transport.

The review of the existing knowledge base also highlighted significant evidence gaps such as limited information on how priorities differ across demographics and parts of London.

For this next phase of this work, we would like to further explore this issue to better understand how VfM varies among different Londoners and identify the most effective ways to improve VfM. Given the tough financial situation many transport operators face, we would like to develop a more informed and targeted approach so that we can champion the interests of the transport users who are most in need of support.

What we'd like from the research

1. Build a detailed understanding of people's perceptions of VfM on London transport and the drivers behind this, along with passenger priorities to improve VfM.
2. Use the research to build and inform different personas to help draw out where there might be material differences in perceived VfM, and what might be done to improve VfM, between different segments of the population.³
3. From this, identify priority groups for improving VfM and the type of support that would be most beneficial for them (within the two pillars of affordability and service provision).

Affordability is an integral part of this research project and a focus for London TravelWatch. This could include identifying groups for whom affordability, rather than service quality, is the bigger issue to tackle and recommendations to target support to them e.g. specific concessions.

4. Use these findings to engage with TfL, the Department for Transport and train operators, calling for them to implement our recommendations to improve VfM of services for passengers.

To achieve this and to help create a compelling public narrative some of the key points we'd like to be able to make following the research are:

- XX% of people say that VfM from using transport services in London is important to them

³ We are looking for engaging persona which generate new insight. The Department for Transport's [Transport Users Personas research](#) is an example of what this could look like, though we are open to other approaches. In the initial London TravelWatch research some potential groups were indicated as of interest, such as people without the option to work flexibly or those with low incomes, which may serve as a useful starting point.

- XX% of people feel like they are not getting value for money on London's transport and YY% think it has got worse/better in the last z years
- Perceptions of VfM are lowest among {insert most impacted demographic groups/areas/personas}
- Londoners as a whole feel that transport mode X delivers best VfM and mode Y delivers the worst VfM {with key differences by group also highlighted}
- The main reasons people say they aren't getting value for money are A, B and C
- People want to see improvements in X, Y and Z to address the issue
- That's why we're calling for transport operators to do {insert top recommendation(s)}

Methodology

We are open to proposals from agencies on the balance of the best methodologies to use to meet the aims of this research. However, we would expect proposals to contain at least some of the following:

- A comprehensive passenger survey to build up a general understanding of priorities and to create about seven to eight groups to represent the public. There could also be tailoring towards specific individuals that provides more in-depth surveying.
- A discrete choice approach survey about people's willingness to pay. This can deep-dive into people's actual preferences versus stated preferences and require them to make choices and see trade-offs.
- Qualitative surveying in focussed workshops of target groups. This could include non-travellers and focus on specific areas such as employment and location.

The work will also need to be based on a demographically representative sample of Londoners. Ideally we would like to have a robust sample size that we can split across at least the following lines:

- Different modes of transport
- Different parts of London (e.g. Inner vs Outer London)
- Across key demographics e.g. gender, race and ethnicity, age, income, employment

Budget

We have a budget of £80,000 for this project (including VAT).

Timings

We would like this project to be completed by 13 March.

Submission process

Please provide a written submission outlining your proposal. Please include a breakdown of costings and a timeline for the work. You may want to include example material from previous projects you have worked on.

Please email Trevor.Rosenberg@LondonTravelWatch.org.uk with your submission. The deadline is 14 November.

Evaluation of bids

All bids will be evaluated on technical and commercial factors, taking into consideration how each proposal will successfully meet our brief and budget. We will also look for experience of conducting similar research and expertise in this subject area.

Shortlisted bidders will be invited to an informal interview to discuss their ideas in more detail. We are also happy to arrange an informal chat with prospective bidders to discuss the project further.