

Tender for London Rail user research

Introduction

London TravelWatch is the official watchdog organisation representing the interests of transport users in and around the capital. London TravelWatch is sponsored and funded by the [London Assembly](#), which is part of the Greater London Authority.

London TravelWatch promotes integrated transport policies and presses for better public transport, with higher standards of quality, performance and accessibility. We liaise with 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 represent users on all Transport for London modes, National Rail in and around London as well as those who walk cycle or drive in the capital.

You can find out more about us at www.londontravelwatch.org.uk

Research context

In the 20 months since the pandemic began, the railways have undergone rapid change, with the rail industry largely responding well to unexpected circumstances and keeping key workers moving. During this time, the Government has backed rail companies financially to ensure services could keep running.

Today, the demand for rail travel is gradually building back up, with recent campaigns from the rail industry encouraging people to get back to rail. We are also at a significant moment of transition towards the new Great British Railways framework that promises to put passengers first.

However, the pandemic has thrown into question many of the assumptions and predictions about how people will travel in London in the future. It is not simply a case of 'getting back to normal'. Further, the rail industry, after over a year of being primarily funded by taxpayers, is set to make big changes to the services and provisions available to rail passengers due to financial pressures to cut costs: some of which London TravelWatch have already expressed concern about.

When it comes to what rail passengers need therefore, no one can truly give a long-term projection as we once could. For over 20 years, year on year growth in demand kept the franchising model in operation, with many rail passengers belonging to a captive market. This is no longer the case.

Many have been speculating about which behavioural and demand changes will be permanent and what we can do to make sure transport is greener, safer and convenient for people after the pandemic. To respond to this uncertainty, London

TravelWatch and Transport Focus have spent considerable time talking to London's rail users in the last year to understand the concerns and priorities, as far as is possible in such uncertain times, of those who will be using the rail network in years to come. Our research has echoed what many in the industry have recognised: we simply cannot predict exactly what will be needed as we recover from the pandemic.

In all this, London rail passengers face particular pressures and have particular needs. We know that rail passengers from London and the South East are the least satisfied. Unlike in other parts of the country, London's rail network is used in an integrated way with the rest of TfL's public transport network, thanks to ticketing via Oyster and contactless payment. This has been a real benefit to Londoners but has also exposed inequalities in the access to good, reliable and affordable rail travel depending on which train company you rely on, or where you live.

These inequalities extend to areas beyond the TfL network. For example, we have been monitoring fare levels and the large differences in fares paid by people travelling into London from similar distances, with people in towns like Hemel Hempstead and Harlow paying around £39 a week more for a 20 mile commute into London than those living in Oxted. Passengers need a fairer fares system which is easy to use and transparent.

Or in the case of those who live in south London, which has historically poor rail and Tube access, rail plays an essential role in connecting inner and outer south Londoners. Yet in the last year alone, there have been cuts to key services on Thameslink routes in South London, whilst the South Western Railway consultation proposed a reduction in frequency for services in south west and west London.

Research aims and specification

In order to best represent London rail users in the coming months and years, London TravelWatch want to know more about the priorities and pressures facing London rail passengers. We want to investigate which service patterns, timetables and frequencies will best suit London rail users, if this differs significantly to what we already know, and if needs are different between different types of rail users. We would also like to get an idea of how fare levels are likely to influence rail passenger travel patterns and demand for rail travel.

We would like the research to investigate:

1) Priorities around capacity, frequency, performance and reliability

When designing timetables there is always a trade-off between capacity, frequency, performance and reliability. What priorities do London rail users have? This could potentially be explored through 'what would you rather' questions to help narrow down priorities, e.g. would you rather have more frequent trains but a less reliable service, or more reliable but fewer trains? At the moment, TfL's metroisation vision outlines a minimum of four trains per hour to keep up with the service frequency consistent across other TfL's services. This is not always met however, and it would be useful to test this with passengers.

Another thing to test is how important is capacity. Do rail passengers mind standing occasionally if it's a reliable service (or waiting for a seat if there are fewer services with longer carriages)? Or would they be happy if they could still get a train at the same time, but have to make a connection or change to reach their destination? With more infrequent rail travel likely, perhaps the priorities of some passengers may have changed.

2) Accessibility

We are keen to look at the issues around poor accessibility and how potential changes to timetables, staffing and ticket office opening times are disproportionately likely to impact many disabled people. This includes those who cannot use mobile technology and other digitally excluded people, non-users and infrequent users: for whom inaccessible services, infrastructure and information can make rail travel an off-putting experience. When combined with failures in other key systems that many disabled people rely on, such as passenger assist, there can be serious consequences.

3) Choice and preference

When talking to London rail passengers, we want to ask questions in the context of how they use all public transport. Most London rail passengers are also users of other modes. How are they making decisions about how to get around? What pressures do they have when they make these decisions: is it cost, convenience, lack of choice due to limited options?

Other themes to explore

We want to ask slightly different questions to those we may have done previously. The assumptions of rail demand growth are now not certain, but rail will need to continue to play a role supporting social benefits as well as providing a sustainable alternative to private car use. What is the best, most useful service for non-users, infrequent users and users of other modes?

In addition to these themes, we may want to test:

- Existing priorities we've gathered from previous research, testing them with rail users across a range of London's geographical areas in the context of 'post-pandemic' travel. Some of these will come from our research earlier this year, and existing research with rail users by Transport Focus.
- A comparison of satisfaction and concerns of rail passengers in similar areas/distances/zones of London, and with each other. (For example users of a station in zone 3 in South and North London, or users of interchange stations such as Clapham Junction and Finsbury Park).
- Perceptions of the rail network and how people think about it in London (Is it part of the TfL network? Do you think it should be?)
- Preferences around frequency in relation to rail users needs (Commuters who have no choice but to travel every day versus those who can work from home, or those who use it at weekends and at night to socialise and for leisure trips, or those who only travel for work).

- Perceptions in regard to safety, staffing, lighting and general environment.
- Perceptions of the cost of using rail: are fares a good price, or is it too expensive? Fare levels may contribute to passengers' decisions about how many days they are likely to commute as many employers introduce hybrid working patterns. It could also inform choices for leisure trips and other non-work journeys.
- Communications from rail companies – what kind of communication do passengers prefer and how can companies improve their communication, both before and during times of planned and unplanned disruption?

Other considerations

It is really important that the research is representative of London's demographic make-up, and that we hear the views of a range of Londoners of different ages, incomes, professions and from different parts of London. We would also want the sample to reflect London's statistical balance: so at least 45% from BAME backgrounds and 25% with a visible or non-visible disability.

In particular, it is important with this project that the socio-economic differences are captured. Historically the rail network has been used more by commuters and professionals and those with higher incomes, in comparison to the bus for example. But there is no reason why this should be the case for the future, and it is important to find out the priorities of all types of users to ensure recommendations speak for all Londoners.

Budget

We have a budget of £40-50k for this project.

Timeframe

We would like this research to be completed and delivered by the end of February 2022.

Methodology

We are keen to hear proposals from agencies which meet the specification in the way they see best fits. This could include focus groups, interviews and/or a survey.

For any qualitative work, we would like a good geographical spread and would like to work with the agency to design a framework to select participants from a range of London areas and stations. For example, it could include zone 6 commuters who use a range of Train Operating Companies in one focus group discussing the similarities and differences of their experiences. Then in another, have participants from different inner London zones. This way we could see if there are parallels across different 'types' of users and contrasts, for example rail users from south London versus north London, where there may be more tube alternatives for example.

Submission process

Please provide a written submission outlining your proposal. Please include details about how long you think the project would take and how much you think it would cost. You may want to include example material from previous projects you have worked on.

Please email info@londontravelwatch.org.uk with your submission.

Evaluation of bids

Bids will be evaluated in terms of technical and commercial factors on a 60:40 split. We will also look for experience of conducting similar research. Shortlisted bidders will be invited to an informal interview to outline their ideas in more detail.

We are also happy to arrange an informal chat with prospective bidders to discuss the project.

Deadlines

The deadline for returning a tender to us is 3 December 2021.