

## Tender for London bus user research



### Introduction

London TravelWatch (LTW) is the official independent transport watchdog for the city. We use evidence to campaign to improve journeys, and advocate for all people who travel in and around the capital. LTW is sponsored and funded by the London Assembly, which is part of the Greater London Authority, and is independent from transport operators.

LTW promotes integrated transport policies and pushes 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 passengers on all Transport for London (TfL) services, National Rail services 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](http://www.londontravelwatch.org.uk)

### Research context

Buses are used by more Londoners than any other type of public transport. They're the backbone of how people move around the capital, providing the most accessible, affordable and city-wide way for people to travel. Whether it's for getting to work, caring responsibilities, health appointments, essential errands, or social visits, buses are a vital part of people's lives.

London TravelWatch's [Who uses the bus? research](#) found that one third of all bus journeys are made by people in households earning less than £20,000 per year, who are more likely to be blue collar/key workers and who must work in person. Night buses are also important to those on lower incomes. Bus passengers are also more likely to be people of colour, women, or younger people. And the price differential between bus and tube/train is too great for many passengers to take the more expensive though quicker option.

Due to a lack of bus prioritisation and available road space for buses, bus speeds have fallen over the past decade, resulting in many people thinking the service is unreliable and slow. This means that buses become less inclusive and attractive to use. TfL acknowledge that there is a clear correlation between declining bus demand and deteriorating bus speeds. In financial terms, slower buses undermine the economic viability of buses, which means that they will require more subsidy.

Alongside this, and with TfL's finances continuing to be under pressure, buses have been targeted as a way to make financial savings. Over the summer of 2022, TfL consulted on significant bus reductions and, though following strong opposition to the proposals TfL withdrew most of the changes, this highlights that bus services are susceptible to cuts. This would result in significant disruption to people using buses to travel around London, in turn discouraging people from using them – resulting in a vicious cycle of declining use and cuts.

If buses become increasingly unattractive the risk of passengers switching to cars will become an increasing reality. This is particularly likely in outer London, where we know that there are already higher levels of car ownership and poorer public transport connectivity.

We know too that a 40% increase in bus use is required if the Mayor of London is to meet his target of 80% of journeys in London being made by cycling, walking and public transport by 2041. If such an increase in bus use is to be achieved, significant efforts will need to begin now and be sustained in the years ahead.

TfL's [Bus action plan](#) recognises that buses will play a key role in a green and inclusive recovery in London. Better journey times is one of the five key themes they have identified to consider as part of this.

There is also real opportunity for progress. In part because of our work, the Mayor of London made manifesto commitments to both improve bus priority and outer London bus services. London TravelWatch would like to see further progress from TfL, but also more engagement and action from Boroughs to implement bus priority measures and improve bus services.

We now need to continue to build on the support and momentum to further free and, where needed, save the bus.

## **Research aims and specification**

To support London TravelWatch's bus campaign we are commissioning research into public attitudes towards, and use of, buses.

This will provide a strengthened evidence base to demonstrate the priorities and needs of people who travel by bus in London. We want to understand what currently matters most to London's bus passengers across the capital.

While there has been previous research looking at some of these questions, this has generally been conducted pre-pandemic. We want to test our understanding and see if (and how) people's attitudes towards and use of buses may have changed.

We will then use this knowledge to better advocate for people who use the bus in London, including through engagement with key policy makers and decision makers. This includes the Mayor of London, TfL and London's boroughs, the latter of whom are responsible for 95 per cent of London's roads.

The areas we are particularly interested in (and potential questions) are:

### *Bus usage*

- Has the Covid pandemic impacted how and why people use the bus? If so, why?
- Would bus passengers currently recommend to friends and family that they should use the bus? Why - or why not?
- How does the availability of a good bus service impact passengers and the local community? We are particularly interested in the impact on things like health, the

ability to do necessary tasks (e.g. go to medical appointments or get to work), and local economic benefits.

- What are passenger expectations over the next few years? Do they anticipate their usage will change? And do they think services will get better/worse/stay the same?

### *Passenger priorities*

- What are the most important factors for passengers when deciding to travel (or not travel) by bus? Is it bus frequency and reliability above everything else or are other factors as, or even more, important? Have things like fewer bus kms being operated, some reductions in bus frequency and stubbornly low average bus speeds impacted how likely people are to use buses?
- What would make people use the bus more/switch from other modes?
- Do bus services get people to the places they want to go? Is the connectivity between modes satisfactory?
- What changes would passengers like to see to bus services? How do they view measures such as bus priority, and are there any specific measures they would like implemented?

### *Information and communication*

- Is there enough information online, at bus stops and on buses to help plan and make journeys?
- Does the information provided when there's disruption/detour/curtailment meet passengers needs?

### *Accessibility*

- Are there things that mean that passengers with accessibility issues will avoid using the bus in favour of either other modes or avoid travelling at all?
- For those who cannot use mobile technology and other digitally excluded people, can they plan journeys in advance of travel?
- Do bus stop bypasses have an impact on the likelihood that people will travel by bus? There are particular concerns about the impact on Disabled people and older people.

## **Budget**

We have a budget of £30k (including VAT) for this project.

## **Timeframe**

We would like this research to be completed and delivered by the end of March 2024.

## **Methodology**

We are open to proposals from agencies on the best methodology to use to meet the aims of the research. This could include a combination of qualitative and quantitative research, for example focus groups, interviews and/or a survey.

We are interested in learning about the experiences of all Londoners, and so it's critical that the research is representative of the city's demographic make-up. We would like any quantitative survey samples to include robust numbers of people from underrepresented groups, including (but not limited to) Disabled people, people of colour and lower income Londoners. Similarly, any qualitative work should reflect the diversity of the city.

We would also like a geographical spread within London, particularly to allow a comparison of experiences for those living in inner London versus outer London. LTW are happy to work with the appointed agency to identify geographical areas of interest for comparison. Borough level breakdowns would also be of significant benefit.

### *Outputs*

We would like both the results of any qualitative and/or quantitative research, and a summary analysis of the findings. However, we do not require a full written report for publication.

### **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](mailto: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 20:00 16<sup>th</sup> February 2024.