

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, as well as 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 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 like they are getting good value for money 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 value for money, compared with 55% for long distance services and 53% for regional services.¹

TfL's customer care survey suggests that people are more satisfied with value for money 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 the issue remains important regardless of the type of transport.

Despite the different passenger perspectives on value for money 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.

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

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

While there is existing research on value for money on public transport (including a [2013 London TravelWatch report](#)), much of this was conducted before the Covid-19 pandemic. There have been significant changes and events since then – from the increase in hybrid working to the cost-of-living crisis – that may have impacted not only how people travel but also how they see transport services.

Given the changing landscape, this London TravelWatch is commissioning a report to review, synthesize and evaluate the existing knowledge base around value for money on transport. This will build and consolidate our understanding of the topic, and form the first phase of a wider workstream on value for money. It will in turn inform our future work on the topic, for instance which aspects we focus on or where further research is needed.

Focus on low-income Londoners

Within this work, we are particularly interested in the experience of low-income passengers. While access to public transport is often vital to carrying out everyday activities, the rising cost of living is putting more financial pressure on Londoners. Those on the lowest incomes are most impacted, with TfL suggesting that transport costs represent a tenth of their outgoings,³ and it may have an impact on if and how they travel.

As well as aligning with London TravelWatch's EDI Framework, including a spotlight on low income Londoners in this project will also support our engagement with TfL's Equity in Motion (EiM) strategy. One of the "four pillars" in this strategy is keeping travel affordable, with a focus on targeted support for those who most need it. We understand that TfL will be giving more attention to this objective in 2025, providing an opportunity for us to engage on the topic and advocate for more action to improve value for money.

Project objectives

1. Build a better understanding of the drivers of value for money on London transport and the current situation facing passengers.
2. Identify clear and deliverable next steps for the second phase of this work, including any evidence/knowledge gaps and priority areas for action.
3. TfL and DfT/TOCs engage with our work and where relevant take action to address issues highlighted to improve value for money of services.
4. Throughout each of the objectives include a focus on low-income passengers, who are likely most impacted by affordability and poor value for money. We are also interested in data and differences across other key demographics (such as age, ethnicity and inner/outer London) where possible.

³ Page 37 of [Equity in Motion](#), TfL, February 2024

Methodology

We anticipate this piece of work to largely consist of secondary research, including literature reviews and analysis of existing datasets. However, we are open to proposals from agencies on the details of what this will include, and other potential research options.

Budget

We have a budget of £30,000 for this project (including VAT).

Timings

We would like this project to be completed by the end of 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 Alex.Smith@LondonTravelWatch.org.uk with your submission. The deadline is Thursday 9 January.

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.