

- 2.3 The timetable for any Services to be provided by the Service Provider and the corresponding Milestones (if any) and Project Plan (if any) are set out in Attachment 1. The Service Provider must provide the Services in respect of this Call-Off Contract in accordance with such timing and the Service Provider must pay liquidated damages in accordance with this Agreement of such an amount as may be specified in Attachment 1. The Service Provider shall be liable for the ongoing costs of providing Services in order to meet a Milestone.
- 2.4 The Service Provider acknowledges and agrees that as at the commencement date of this Call-Off Contract it does not have an interest in any matter where there is or is reasonably likely to be a conflict of interest with the Services provided to the Authority under this Call-Off Contract.

3. CALL-OFF TERM

This Call-Off Contract commences on the date of this Call-Off Contract or such other date as may be specified in Attachment 1 and subject to Clause 4.2 of this Agreement, shall continue in force for the Call-Off Term stated in Attachment 1 unless terminated earlier in whole or in part in accordance with this Agreement.

4. CHARGES

Attachment 2 specifies the Charges payable in respect of the Services provided under this Call-Off Contract. The Charges shall not increase during the duration of this Call-Off Contract unless varied in accordance with this Agreement. The Service Provider shall submit invoices in accordance with this Agreement and the Charges shall be paid in accordance with this Agreement.

5. CALL-OFF CO-ORDINATOR AND KEY PERSONNEL

The Authority's Call-Off Co-ordinator in respect of this Call-Off Contract is named in Attachment 1 and the Service Provider's Key Personnel in respect of this Call-Off Contract are named in Attachment 2.

This Call-Off Contract has been signed by duly authorised representatives of each of the Parties.

SIGNED

For and on behalf of the [*Authority*]

Signature: _____

Name: _____

Title: _____

Date: _____

SIGNED

For and on behalf of the [*Service Provider*]

Signature: _____

Name: _____

Title: _____

Date: _____

Services to be provided

TfL Specification of Requirements:

1. BACKGROUND: TRAVEL SURVEYS FOR TFL PLANNING

TfL Planning is responsible for planning and implementing a range of transport surveys in the London area. This brief is in respect of a household travel survey, the London Travel Demand Survey. This is conducted through face-to-face interviews and is designed to give core information on Londoners' travel behaviour in order to monitor trends in travel demand and provide data to update transport planning tools and databases.

2. HISTORY

2.1 LTDS 2005/06 to 2014/15

The London Travel Demand Survey has been carried out annually between 2005/06 and 2014/15, with essentially the same data collection method and survey design in each year. This Invitation to Tender is for the continued provision of the survey for two years of fieldwork, with options to extend for a further 2 years, depending on agreement between TfL and the Contractor.

2.2 The Basic Survey

The current survey has a target sample each year of 8,000 fully responding household residents within the study area, which consists of Greater London (the London boroughs area) and the rest of the surrounding area within the M25 motorway. Individual targets are set for the sample to be achieved in each London borough. The sample is further stratified into 528 Sample Control Areas (SCAs) within the study area in order to control the spatial distribution of the sample and to ensure representative coverage of travel across all parts of London. Each SCA covers an area that an interviewer can reasonably cover in a single assignment.

From 2015/16 the intention is to target a sample of the Greater London area only. The target sample each year will continue to be 8,000 households, stratified within 474 Sample Control Areas within the London boroughs area only.

Interviews are carried out in respondents' homes or on the doorstep by trained interviewers. Interviews consist of a combination of pre-coded paper questionnaires and one day travel diaries. Full details of all trips (journeys) made by the respondent on a recent 'travel day', usually the day before the interview, are recorded on trip record sheets. Travel days are allocated to households prior to the interview and chosen to give an even spread of days across the week, including weekends (examples of questionnaires and trip record sheets used in LTDS 14/15 are included in *Appendix 1a - d LTDS Survey Questionnaires*).

Data is required from all members of responding households. An initial interview with any responsible adult is held to collect information about the household as a whole, to the respective residents with some demographic details and to identify the number of household vehicles. This is followed by individual interviews with all household members (with the exception of children under 5-years) to collect further data; identify their travel patterns and their actual trips made on the travel day.

2.3 Continuation

The contract for the provision of LTDS shall be for 2 years with the option to extend for a further 2 years respectively (2+1+1), subject to TfL's agreement.

After the initial set-up period, including a pilot study expected to take place from January 2015, the main survey fieldwork will start in April 2015.

Each year's survey covers the whole of the study area with fieldwork spread evenly throughout the year. Fieldwork should be conducted on a continuous basis, such that there is no break between the completion of one year's survey and the start of the next.

3. OUTLINE OF REQUIREMENTS

3.1 Survey objectives

The overall aim of the survey is to provide a reliable source of data for cross-sectional analysis of travel in London and to track trends over time. The data will be used to support:

- monitoring of the effects of transport policy and trends;
- strategy development and planning studies;
- estimation of transport models for forecasting, scenario-testing and scheme assessment.

3.2 Data content

The survey design and core content are kept the same from year to year; however, this is subject to some changes to questionnaires made each year to meet changing requirements or to improve the quality of data. The appointed survey Contractor will be responsible for developing the questionnaires for LTDS for each year from 2015/16 onwards from the information on data requirements provided by TfL.

3.3 Content of proposals

The following sections describe a specific survey method following the survey design and methods used for LTDS 2014/15. Proposals shall be based on this basic design. Additionally, bidders may make suggestions for alternatives or improvements to aspects of the design that would continue to achieve the same objectives without loss of data quality.

Proposals are also invited for variants to the basic design as outlined in Section 6. These are included in case TfL wishes to make changes to the basic survey in future years within the same contract. Costs should be included in TfL 90865_A_ITT_Volume_1_Annex_2 _Commercial Evaluation Sections B (for variations to the target sample) and C (for supplementary surveys by other data collection methods), to form a basis for agreeing costs between the Contractor and TfL in the event that these or similar changes are introduced.

Whilst the selection of a Contractor will be based on the technical assessment of their submissions for the main survey against the technical evaluation criteria, consideration of the variants and their costs will also be taken into account.

4. THE CORE SURVEY

4.1 Data collection: the interview

Although much of the survey data will be obtained from individual respondents, the essential survey unit is the household. Only interviews with complete households are acceptable and count towards meeting the sample targets. In some circumstances, when interviewers are unable to contact some household members for face-to-face interview, proxy data provided by other household members may be acceptable to complete the full household.

4.2 Sample size, stratification and selection

The survey will be carried out in the London area, covering households within the whole of Greater London (the London boroughs area). For the core survey, the aim remains to achieve 8,000 completed household interviews in each financial year (April to March), such that the distribution of the sample reflects the distribution of population in the whole study area in each year.

To achieve this, the survey area is stratified into sample control areas (SCA) (*Appendix 5 Map of 474 SCAs within GLA*). These serve two purposes, in defining suitable areas for interviewers to work and giving control over the geographical spread of the sample. The SCAs are used with population data to control the expansion of the sample data. In previous survey years, a set of 528 SCAs has been defined specifically for LTDS by grouping 2001 Census Outputs Areas nesting within borough boundaries. From 2015/16, only the 474 SCAs that fall within the Greater London area will be sampled.

Sample addresses are selected from the Postcode Address File (PAF). The Bidder will be responsible for adapting the PAF to exclude the addresses selected in previous years. The number of sample addresses to select in each SCA is set to a predetermined assignment size.

This size of assignment will be typically between 20 and 40 addresses, the number chosen to give sufficient addresses for an interviewer to achieve a given target in each SCA. The aim is to complete the total 8,000 households interviewed each year by achieving approximately equal numbers, averaging between 16 and 17, in each SCA.

4.3 Interviewer tasks

Households selected to take part in the survey are sent a letter and leaflet explaining the survey in more detail. Copies of the leaflet developed for the 2005/06 to 2014/15 survey are attached at *Appendix 3 LTDS Leaflet*. The Contractor will print and distribute leaflets to the fieldwork team for delivery to their sample addresses (leaflets to be updated by TfL prior to distribution).

All interviewers should be given a unique ID number that should be present on all of their documents. Interviewers are issued with assignments consisting of a number of addresses within a SCA. Interviewers will not be expected to have more than one SCA open at a time unless they are coming to the end of an existing SCA. The number of weeks an SCA is allowed to remain open will need to be controlled and the interviewer will be expected to ensure that all addresses have been suitably resolved within the agreed timeframe.

To establish initial contacts, interviewers are required to call on addresses at least four times at different times of day (including evenings) and different days of the week, with at least one attempt after 7.30pm.

On making contact with a responsible household member and gaining their household's agreement to take part, the interviewer may make appointments to call back to interview other household

members. Only when **all** household members (excluding children under 5) have been interviewed will the interview be classed as complete.

Before an interview, the interviewer will assign a travel day, which will not be revealed to the household. This is so that interviewing does not (consciously or unconsciously) influence travel patterns on the given day. The travel day may be either the day before the interview or the day before that. Interviewers are instructed to choose travel days evenly among the days of the week. Corrective action on the part of the Contractor may be required if the number of returns for any day is outside a range of 12%-16% of the total interviews achieved.

For each household, the travel day **must** be the same for every member of the household. When the interviewer calls and collects trip information for those persons present, the day is then fixed. If most household members are out at first contact it could be best to arrange a return appointment and by implication, a later travel day. Return calls must be made as early as possible thereafter to secure trip information from household members not at home at the first interview. Every effort should be made to contact respondents whilst the memory of their day's travel movements is still fresh.

For each issued sample address, interviewers are required to complete a Contact Record Sheet, giving details of contact attempts to gain an interview. Failure to gain an interview may be due to either non-contact or refusal. Reasons for refusal are recorded on the Contact Record Sheet. Information should also be collected on out-of-scope addresses such as empty properties or commercial properties.

If the household agrees to take part, the interviewer must make all reasonable attempts to contact all members of the household. Adults will be present when children are interviewed or may answer on behalf of young children, who do not travel alone. Adult members who are absent at a distance may be interviewed by telephone, while in some circumstances, such as illness, a proxy interview with another household member may also be acceptable.

To be regarded as complete, household interviews must have:

- full contact and property information;
- full household information;
- full person information for all household members;
- interviewer's completed travel diaries for all household members.

4.4 Interviews and trip records

The interview itself consists of three parts. Versions of the questionnaires used in the LTDS 2014/15 are provided in *Appendix 1a – d LTDS Survey Questionnaires*

- Part 1: Household Questionnaire. Household, summary person details and vehicle information to be obtained from any adult in the household.
- Part 2: Person Questionnaire. This should be obtained from each household member aged 5 years and over. Parental consent is required to interview children aged 15 or younger.
- Part 3: Travel Diary. This collects details of all trips started in the travel day for each household member, under the same guidelines as Part 2. Children travelling on their own (usually 11 to 15 years old) should themselves be asked about their travel patterns. In LTDS, the travel diary consists of one or more "trip sheets". Each trip made by the respondent is recorded on a separate trip sheet and numbered sequentially.

The trip sheet records information about the whole trip (such as destination address, purpose, start and end times) and about all interchanges within the trip (such as address or location of stations and bus stops, vehicle or modes of transport used, walk times), as well as supplementary information on

parking, and ticket types. For the 2015/16 survey the data content is expected to be similar, however, bidders may make proposals for changes to the design and layout of the trip record sheet.

4.5 Travel data definitions.

A **trip** is defined as a one-way movement from an origin to destination to achieve a purpose. Each change of purpose represents the start of a new trip (although incidental stops such as buying a paper on the way to work are disregarded). A round trip (e.g. walking the dog) is divided into two parts at its farthest point, to form separate trips from the outward and return legs.

Trips are subdivided into **stages** by identifying interchange points, where the traveller has changed from one mode of transport to another or one vehicle to another.

Respondents are required to report all their trips starting during the travel day, beginning at 4am and ending at 4am the following morning.

Full details are required for trips that either start or end in a defined travel area, broadly corresponding to London and the South East of England.

For trips, or sequences of consecutive trips, wholly outside the study area, the respondent may provide summary information only, consisting of a main mode of travel (i.e. the mode of transport used for the longest distance) and trip end addresses.

Within the travel area the data must cover all trips made on the travel day, including all modes of transport and walking.

It is particularly important that all walks, however short, are fully identified, whether they formed a complete trip or part of a trip (stage) between interchanges. The only exceptions relate to walks within premises between stages, using the same mode of transport: for example, changing trains within a station. In this case the train to train interchange is recorded; however, the walk between trains is omitted.

4.6 Examples

A simple example of a main-mode Underground trip might consist of three stages:

Home to Station 1: walk
Station 1 to Station 2: London Underground
Station 2 to Office: walk

In this example, there is a single Underground stage between Station 1 and Station 2 with no change of trains.

If the journey involves a change of Underground train then the interchange (at Station 2) should be recorded, as follows:

Home to Station 1: walk
Station 1 to Station 2: London Underground
Station 2 to Station 3: London Underground
Station 3 to Office: walk

Note there is no walk recorded at Station 2 because the interchange occurs entirely within the station.

A more complex example might involve stages by both rail (National Rail) and Underground:

Home to Station 1: walk
Station 1 to Station 2: rail
Station 2 to Station 2: walk
Station 2 to Station 3: London Underground
Station 3 to Office: walk

In this case, a walk is recorded between rail and Underground because a change of mode is involved.

4.7 Trips in course of work

As a general rule, all trips in the course of work are included in the survey, as they are regarded as personal travel.

However, for certain occupations, their trips in the course of work will not be considered personal travel and may be omitted. For example, when the respondent is driving a bus, taxi, train, or other public transport vehicle as part of their job, this is excluded. Commercial vehicle trips for the purpose of distributing goods should be omitted if this is the sole purpose of the delivery (deliveries associated with a service provided by the driver are included). All other trips in course of work, including trips between home and work and trips on employer's business should be included. Trips by delivery drivers and roundsmen making a series of calls may be summarised into a single summary trip, with address details collected only for the first and last stop.

4.8 Address data

The quality of address data is of high importance. Full details are required for all trip origins and destinations and locations of interchanges, to enable accurate geo-referencing to be derived for spatial analysis. The data is used to derive estimates of travel distance, for relating travel to land use and for calibrating trip distribution models. When postal addresses are either unknown (e.g. shops visited), irrelevant or non-existent (e.g. parks, sports grounds, bus stops), the locations must be described as fully as possible in order to be identified to a high level of precision from gazetteers or maps during the geocoding process (see below).

Coding requires addresses to be entered in full and interviewers are instructed to use only approved abbreviations and to avoid losing address detail.

On the trip record sheets, addresses of trips to 'home', 'usual workplace' or 'school' can be summarised by codes such as "H", "W" and "S" or by using tick boxes, since these address details are already collected in full in the person questionnaire.

Appendix 4 Guidance on Addresses contains further guidelines on the collection of travel survey addresses. Bidders are invited to make their own suggestions and specific comments on this aspect of the data.

4.9 Incentives

In common with many other sample surveys, LTDS offers respondents a small incentive to thank them for their time and effort in taking part. Incentives consisting of shopping vouchers to the value of £5 per respondent are issued provided *all* eligible members of a responding household do complete the survey. If they wish, households may opt to donate their incentives to one of four specified charities. Bidders should make provision for these or similar incentives in their bids.

4.10 Re-contacting respondents for further research

At the end of the individual interview, all adult respondents are asked whether they would be willing to be contacted again to take part in further research about people's travel behaviour for TfL. Contact details for those willing to be re-contacted (the 're-contact sample') must be retained by the fieldwork Contractor in a secure database, satisfying all the provisions of the Data Protection Acts for handling personal data. The TfL Project Manager may request the database, or extracts from it to be released either to TfL or to third parties commissioned by TfL to carry out further research or follow-up surveys to LTDS.

4.11 Management

Tender proposals should describe how overall management of the project will be structured and clearly define the roles and responsibilities of Project Directors, Project Manager and Supervisors.

Supervision and control of the survey must be of a high standard and proposals should clearly specify the procedures that would be adopted and who would be responsible, identifying those areas of survey operations under a dedicated team.

Day to day contact shall be between the Contractor and a TfL representative based in TfL Planning, who will act as TfL's Project Manager and liaise with internal TfL clients.

The Project Manger will wish to be in continual contact with the progress of the survey and will in addition:

- a) approve all questionnaire design, interviewer instructions and other significant materials
- b) attend a sample of briefing sessions and the briefing and debriefing of pilot survey interviewers and occasional training sessions
- c) receive regular information about the progress of the survey by monthly progress reports (in addition to the weekly summaries of fieldwork progress). These should provide continuous documentation of the survey progress and notice of current or anticipated problems.

4.12 Progress reporting

Fieldwork progress should be continually monitored by the Contractor, where summary reports are expected to be given to TfL at weekly intervals. These would report the numbers of interviews at each stage of the survey progress, for example according to the following list:

Interviews in progress:

- Non-contact no attempts made
- Non-contact attempts made
- Appointment made
- Interview started

Interviews completed with final outcome:

- Full interview
- Partial interview
- Non-contact
- Refusal
- Non-residential address
- Vacant property
- Unable to locate

The fieldwork management should aim to complete the survey at an even rate throughout the year and across all parts of the study area. Progress reports should periodically show a spatial breakdown by Sample Control Area and grouped by borough to ensure problem areas can be identified promptly. The return rate by travel day should also be reported in order to monitor the spread of travel days during the week.

5 CONTRACTOR'S RESPONSIBILITIES

LTDS is large and relatively complex for a survey of this type and will require thorough supervision and careful management. All tenders should include proposals for ensuring high quality and maximising response rates.

It must be understood that the survey is different in some respects from a conventional market research or social survey. Key differences are:

- the need to interview every household member;
- the nature of the travel diary.

Unlike most market research surveys, the interviewers when completing the travel diary do not follow a specified series of questions nor a set script. Instead, interviewers have to obtain an initial outline of the respondent's travel on the travel day and then set out the details in sequence. They can conduct the interview satisfactorily only if they have a clear understanding of the conventions and definitions associated with trip and stage recording and are skilled to elicit the complete details of a day's travel from respondents.

5.1 Interviewer training

Points to note regarding interviewer training are:

- The training programme will need to cover both matters of general practice regarding contacting and interviewing respondents and the specific requirements of LTDS, especially the travel diaries and the need to obtain addresses of good quality.
- It is expected that up to three days training will be needed for interviewers new to the survey and this should include 'dummy' interviewing as part of the training session, to be followed by a small number of accompanied supervised interviews with the public.
- Only when interviewers have demonstrated competence in supervised live interviews should they be permitted to work on the survey as a full member of the interviewer team.

Survey specific training should include a strong focus on the travel diary. Under-reporting of trips by respondents is a risk common to this type of survey. Emphasis must be placed on the need to include all trips, paying attention to those that are most commonly missed, for example, walking, short trips, evening trips, non-home based trips (such as trips while at work) and escort trips (such as driving a child to school). It will also be necessary to focus on the definitions of trips and interchanges so interviewers are confident in applying these definitions in interviews.

TfL will wish to work closely with the Contractor on developing suitable training, particularly with regard to the survey specific training and will wish to attend some interviewer briefing sessions.

5.2 Questionnaire development

The successful Contractor will be expected to propose and finalise the design of the travel diary and questionnaires for use in LTDS 2015/16, subject to TfL agreement. The layout, appearance, preparation and printing of the questionnaires will be the Contractor's responsibility. However, these are not expected to be significantly different from those used in LTDS 2014/15 (see *Appendix 1a – d Survey Questionnaires*). While the core content of the questionnaire is not expected to change from

year to year, some questions may be added or revised in response to changing customer requirements.

5.3 Pilot Survey

Although many features of the survey are repeated from earlier surveys, it is expected there will be a need in the first year for a pilot survey for the appointed Contractor to test and refine the questionnaire and fieldwork processes. This should be carried out in early 2015, after project inception, so that lessons learnt may be considered and applied to the main survey fieldwork starting in April 2015.

Proposals should include a statement of the Contractor's intentions for the pilot survey including details of number of interviews, sample selection, survey area and survey team.

It will be important that the pilot survey is realistic and provides a real test of survey procedures and materials. It is desirable that the staff used would be typical of those to be employed on the main survey.

A report will be required of the pilot survey specifying procedures and presenting materials for the main survey. This will be in the nature of an inauguration report. As well as reporting on the pilot survey, it should present in full:

- the finalised questionnaires;
- all associated materials, such as showcards and sample issue sheets;
- the interviewers' instructions and other training materials;
- a specification of quality control procedures and full details of computer edit checks.
- analyses of data (to be agreed with TfL)

A key function of the pilot survey will be to make an assessment of the quality of the data collected. The pilot survey report should include a commentary on the following aspects:

- item response
- interview completeness
- logic checks
- issues associated with sequencing of trips
- address quality

The report shall also propose any remedial actions that should be taken. The main results should inform the sort of checks supervisors would be expected to carry out, particularly on interviews collected by inexperienced interviewers. It is not expected that the pilot sample size will be large enough to derive statistically robust estimates of measures, such as response rates or trip rates. Nevertheless, a detailed quality assessment of the data will be required and bidders are therefore asked to specify how they will undertake this within their proposal. Processing of pilot data will provide a test of editing and quality control processes.

The pilot survey report should also give an assessment of practical aspects of the survey including:

- Interview length
- Clarity of questions to the interviewer and interviewee (wording)
- Manageability of materials
- Effectiveness of the mechanisms for survey administration at all levels from management to interviewers
- Feasibility of meeting performance targets

5.4 Data input, checking and coding

For the main survey certain targets will be agreed between TfL and the Contractor with regard to data entry and editing. For example, it will be a requirement that:

- partially completed interviews are followed up within a given timeframe and either designated as partially complete or actually complete;
- the collection of raw data is turned into data provision to TfL within agreed timescales.

All data must be input and supplied to the Project Manager by electronic media in a format to be specified. Data should be passed through an edit program of range and logic checks, the specification of which must be agreed with TfL. The logic checks need to be made both within each questionnaire and between questionnaires within each household.

As part of the process of delivering data to TfL, the Contractor will be expected to undertake some consistency and completeness checks of the database and to complete a process (defined by TfL) to create additional variables from the data collected. The database checks include making sure that the records match at different levels of the hierarchical structure.

5.5 Office coding

As well as the standard MRS social grade classification, respondents should also be coded to the Standard Occupational Classification (SOC2000) and the National Statistics Socio-Economic Classification (NS-SEC). Details of current or past employment collected in the person interview are to be coded to SOC2000 four-digit unit group and used to derive NS-SEC.

5.6 Geocoding

The address data should be provided with geospatial references for use with Geographic Information Systems (GIS): these include National Grid References, postcodes and LTS modelling zones (defined by boundary files to be supplied by TfL).

All origin and destination addresses, and locations of interchanges, must be input in full. This can be done most efficiently and accurately when interviewers have obtained good quality address data (see *Appendix 4 Guidance on Addresses*). The address data should be passed to a partly automated matching process using software that will append grid references, postcodes and London Area Transport Study (LATS) zones to each address. The matching process will be most effective if the input addresses are laid out in a specified format, i.e. with designated fields for different elements. The input process should therefore be undertaken in an intelligent, rather than a purely automatic way.

Each address captured in the survey should be geo-coded as accurately as possible. As a check on addresses captured within trip data, the geocoded addresses, together with the modes used, should be used to assess whether the implied speed is within acceptable parameters. Other checks on journey distances, times, speeds and address coding may be proposed.

5.7 Database construction

Data will be provided to TfL by the Contractor at quarterly intervals. Data will be provided in a form that maintains the integrity of individual records, within a MS Access database structure, to be agreed. The database should contain all information collected, including free text such as job titles, industry type, personal contact details and addresses collected on the travel diary.

Text entries in response to questions coded as “Other” should be coded to the appropriate category in the existing code frame as part of data processing. Code frames may be expanded to include new categories where necessary.

All paper copies of the questionnaires, including contact record sheet forms, must be stored and retained for at least 24 months at the Contractor’s own expense and subsequently either destroyed or provided to TfL on request.

5.8 Quality assurance

It is expected that the successful Contractor will have quality control procedures in place that will incorporate feedback to the field from the data entry and edit processes. Reporting on quality control procedures and how this information will be regularly supplied to TfL should also be outlined in the proposal.

The proposal should include a description of manual checks of questionnaires, and feedback to interviewers prior to the data entry stage, particularly for questionnaires completed by new or inexperienced interviewers.

TfL attaches considerable importance to the quality of data collected, and especially the need for consistency and completeness in recording travel diary data. The trip sheets used in LTDS 2014/15 are included in *Appendix 1a – d Survey Questionnaires* and the Contractor should use a similar approach or propose how the collection of the travel data may be improved to ensure quality is maintained.

TfL may institute a system of checks on completed interviews in addition to those carried out by the Contractor and may wish to visit survey management and data processing offices and to inspect completed interviews.

Points regarding **quality control and survey methodology** are:

- Interviewers should be prepared to work irregular hours with substantial coverage of evenings and weekends.
- They should meet a set minimum level of productivity to be agreed with TfL
- Sample addresses should be visited at a range of times of day and days of the week.
- Backchecks of a proportion of each interviewer’s work will be required. Tenders should specify the level and content of backchecks and also how interviews for backcheck would be selected. This could be a fixed proportion of each interviewer’s work or a more selective approach could be adopted. TfL will require regular reports on the backchecks undertaken.
- All returned interviews should be promptly checked, particularly the trip diaries. Bidders should specify the action which will be taken in the event of individual interviewers returning unsatisfactory work.
- Conducting dummy interviews with interviewers to ensure that interviewers probe correctly and conduct interviews in appropriate manner.

Rapid feedback to the fieldwork operation from the data input and edit process will be needed. Additionally, TfL will conduct on-going analysis; edit checks and examination of indicators such as trip rates. These checks by TfL should not be seen as a substitute for the Contractor’s quality monitor, but they may independently raise issues to be referred to the Contractor for further action.

Proposals should also discuss how the fieldwork team will be kept fully motivated to ensure the retention of high performing quality staff. Details should be provided on how this could be achieved which may include measures such as:

- motivational or team building days
- monthly newsletters to interviewers
- productivity bonuses
- provision of travel expenses (e.g. Oystercards)
- other incentives

6. SURVEY VARIATIONS

Bidders are invited to present proposals and prices for a LTDS to the design and methodology outlined above, to achieve a sample size of 8,000 fully responding households in the study area. This design represents TfL's preferred option for the LTDS.

Quotations should be submitted as a lump sum for all work associated with the main survey for each of the two years, and options for each of the further two years. In addition, a breakdown by task of the budget should be provided on the schedule at *Appendix 5 Map of 474 SCAs within GLA, Section A*.

6.1 Reduction of overall sample size

TfL wishes to retain some flexibility to vary the survey design and sample size during the course of the project if this proves necessary. Bidders are therefore required to make proposals for the achieved sample sizes of 6,000 and 4,000 households. In each case, proposals should briefly discuss the effect on survey design or survey operations, and set out the price variations (to be shown as in the schedule in *Appendix 5 Map of 474 SCAs within GLA, section B*):

6.2 Alternative survey designs

Bidders are also invited optionally to suggest alternative approaches to particular aspects of the survey design or survey methods that they consider would improve the survey, provided TfL's objectives for the survey are still met. Proposals should make it clear if such alternatives are presented and give reasons. Costs for such alternatives should be given on separate copies of the Pricing Schedule (*Appendix 5 Map of 474 SCAs within GLA*)

6.3 Other data collection methods

During the term of the contract, TfL may wish to carry out data collection related to the main LTDS but using other data collection methods. Such research might include telephone interviews or self-completion questionnaires, either on paper or Web-enabled. Bidders are invited to give cost rates for such methods in *Appendix 5 Map of 474 SCAs within GLA, Section C*.

TfL may also wish to commission further research or surveys by a range of methods of data collection, either independent of LTDS or in the form of follow-up surveys to subsets of the re-contact sample. Bidders are invited to give price rates for such methods (including any pilot survey and set up costs) as a basis for agreeing costs for specific projects during the course of the LTDS contract (see *Appendix 5 Map of 474 SCAs within GLA, Section D*),

7. Issues for consideration

The following issues should be given particular attention when Bidders are preparing their proposals.

7.1 Maximising response

The response rates in LTDS have generally been around 50 per cent for fully completed interviews. Proposals should include brief descriptions of measures that will be taken to ensure that the response rate does not drop significantly below this level, and suggest ways to increase response rates while maintaining the required level of data quality, completeness and representativeness.

7.2 Measuring and controlling bias

Interview surveys of travel are invariably prone to biases from a number of sources. To maintain data quality it is essential that such biases should be minimised and, where they cannot be eliminated, it is desirable that bias should be identified in quantitative terms so that correction factors may be applied to the survey results. Bidders should explain how they would identify and quantify bias in survey responses.

7.3 Proxy interviews

Proposals should specify the extent to which Bidders would expect to use either telephone interviews or interviews by proxy to complete household responses. For any approach to be effective it must result in respondents being contacted when memory of their day's travel is relatively fresh. Proposals should explain how this may be achieved.

7.4 Ineligible addresses

Experience with LTDS 05/06 to 14/15 suggests that the percentage of ineligible addresses in the drawn sample from the Postcode Address File averages about 8 per cent over the study area. Assuming a 50% response rate overall from the remainder, it will be necessary to issue at least 17,250 addresses per annum in order to achieve the target sample.

7.5 Multi-occupancy addresses:

When two or three households are found at one address all should be included. When more than three are found, a randomly selected sample of three is required to be selected using a pre-specified procedure. Multiple household addresses slightly reduce the number of addresses needed to be issued.

8. GUIDANCE ON SAMPLE NUMBERS, TRIP, STAGES ETC.

In the LTDS 2012/13 the number of trips on the travel day averaged 6.0 per household or 2.6 per person. On average, there were 2.2 stages (interchanges) per trip: 61 per cent of stages were walks. This included very short walks of less than 1 minute duration, for which the end points could be treated as identical, thus reducing the task of recording addresses.

9. TIMESCALE

The following is an outline of the intended timescale for the progress of the project:

Commencement of contract	April 2015
Main survey fieldwork start	April 2015
Complete clean coded data for 2015/16	July 2016

Repeat cycle for 2016/17 (full year interviewing), and optional repeat cycles for 2017/18 and 2018/19 – minor changes to questionnaires and procedures may be agreed between TfL and the Contractor at the start of each year, without the necessity to repeat the pilot survey.

Full details of the specification and appendices are attached below:

REDACTED

TNS Technical Proposal:

REDACTED

1. Timetable

Commencement date: 01/04/2015

Call-Off Term: 2 years plus two (2) further optional 1 year extensions – (1+1):

Year 1: 01/04/2015 – 31/03/2016

Year 2: 01/04/2016 – 31/03/2017

Year 3: 01/04/2017 – 31/03/2018

Year 4: 01/04/2018 – 31/03/2019

2. Liquidated Damages

N/A

3. Expenses

N/A

4. Authority Account Details

REDACTED

5. Authority Call-Off Co-ordinator

REDACTED

6. Availability of Key Personnel

N/A

7. Other information or conditions

Specify any other information or special conditions relevant to provision of Services under this Call-Off Contract

Attachment 2

1. Charges

REDACTED

2. Key Personnel

REDACTED

Attachment 3

Special Conditions for Call-Off

REDACTED