



National Passenger Survey

Descriptive document for information for
tenderers

Tendering opportunity

National Passenger Survey 2007-2010

Tendering procedure – restricted – advertisement placed in OJEU 21 August 2006

Description/object of the contract

Passenger Focus is the operating name of the Rail Passengers Council and is the independent national rail consumer watchdog set up by the Government to protect the interests of Britain's rail passengers. Passenger Focus is an executive non-departmental public body sponsored and funded by the Department for Transport.

Passenger Focus's mission is to get the best deal for Britain's rail passengers with a strong emphasis on evidence-based campaigning and research.

Passenger Focus uses its knowledge to influence decisions on behalf of rail passengers and works with the rail industry, other passenger groups and government to secure journey improvements.

In order to understand passengers' levels of satisfaction with the rail service, Passenger Focus undertakes a National Passenger Survey.

The National Passenger Survey is one of the largest passenger surveys of its type and the results are widely published. The survey is used by the train operating companies to benchmark their performance, and is extensively used by the rail industry, academics and the Government.

The object of the contract is to undertake this survey on a regular basis, surveying a representative sample of rail passengers and reporting levels of satisfaction with a wide range of service attributes. This will be undertaken in a way which is consistent over time and builds on the experience and historic data which the Passenger Focus has already collected from previous National Passenger Surveys.

Specific details of previous surveys and future requirements will be given in the tender documents.

Scope of the contract

The objective of the National Passenger Survey 2007-2010 research task is to obtain, data capture and analyse 25,000 properly completed questionnaires from each of two survey waves per year. This task consists, as a minimum, of the following:

- liaise very closely with Passenger Focus and the current supplier to understand in detail the current National Passenger Survey (NPS)
- obtain from the existing supplier the historic NPS data sets currently held in Quantum (Autumn 1999-Spring 2007). This data will be required for plotting historic trends and for analysis and comparison with future data
- undertake two waves per year of the survey, with fieldwork commencing autumn 2007 and thereafter each spring and autumn until the completion of the spring 2010 wave ensuring long term trends can be identified and are meaningful
- at each survey wave, agree the questionnaire in advance with Passenger Focus
- design and print 85,000 mail-merged questionnaires and reply paid envelopes each survey wave in the spring and autumn (contractor to pay postage on approximately 29,000 returned questionnaires for each survey wave)
- at each survey wave, agree the sampling plan in advance with Passenger Focus

- provide Passenger Focus with a detailed fieldwork schedule in advance and regular updates as the schedule changes
- the contractor must alert all TOCs in advance of fieldwork and obtain explicit permissions for fieldwork from all relevant TOCs and Network Rail or other station operators. (NB some station operators may insist on fieldworkers receiving safety training prior to commencing fieldwork)
- undertake all fieldwork using suitably trained and managed fieldworkers
- manually check the stated journey time for every single questionnaire received on 'RailPlanner' software or a similar database of scheduled train times in order to ensure it is assigned to the correct TOC. Approximately 29,000 questionnaires are received each wave
- accurately data capture and analyse the survey results using suitable tools and experienced staff
- work with Passenger Focus to apply a new weighting regime implementing changes from the reporting of autumn 2007 data onwards
- if significant changes to weighting are agreed, undertake appropriate quantitative analysis to determine the effect of such changes and, if required, correct historic data to maintain a consistent tracking methodology
- provide Passenger Focus and (at Passenger Focus's direction) other parties with data and reports that must be accurate and produced within agreed timescales
- provide statistical analysis of data such as multivariate analysis to help identify the drivers of overall satisfaction by TOC and nationally using suitably experienced staff
- respond within agreed timescales to ad hoc requests for additional reports and analysis within an agreed budget
- hold a database going back to 1999 in a format that allows simple transfer from the existing supplier who holds it in Quantum and allows for a simple transfer to a new supplier at termination of the contract
- production of fieldwork reports detailing achievement and problems each two weeks and supplied within a week of the end of the relevant two week period
- updating of technical survey overview report to ensure that the methodology and any changes are transparent and well documented
- attend formal contract evaluation meetings with Passenger Focus following the completion of each spring and autumn wave of the survey
- provide named key personnel assigned for the duration of the contract
- to identify risks and have contingency plans to mitigate risk
- re-process historical data set in relation to changes to train operating company franchises as they occur.

Evaluation criteria

The contract will awarded on the basis of most economically advantageous tender in terms of the criteria stated below (*in descending order of priority*)

1. evidence of the ability to undertake extensive quality assured fieldwork
2. evidence of the ability to accurately assign, data capture and analyse questionnaires within agreed deadlines
3. evidence of relevant experience, training, qualifications and professional memberships for every level of staff involved in the survey
4. quality assurance procedures for project. Practical measures that will be put in place throughout the project should be detailed
5. price
6. ability to provide standard reports, ad hoc reports and raw data to agreed timescales and formats.
7. evidence of effectively carrying out a project of a similar size and nature to the NPS. The tender evaluation panel may or may not request a site visit or presentation in addition to written responses in order to help assess this
8. ability to liaise effectively with Passenger Focus and Continental Research to understand the current NPS methodology and obtain historical data
9. effective risk management and contingency planning
10. a detailed, well-constructed programme of pilot work and careful consideration of the impact of a new supplier and / or any changes to the methodology
11. innovation in delivering and improving the survey
12. proposal for effective handover of on-going survey from existing supplier to new contract
13. ability to work within the Market Research Society Code of Conduct and its associated guidelines, or equivalent standards.

Important Information to tenderers

For contractors wishing to tender for the above services contractors are required in the first instance to complete the the Pre-Qualification Questionnaire which can be obtained from:

www.passengerfocus.org.uk/nps

or

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The closing date for return of the Pre-Qualification Questionnaire is 2pm, 22 September 2006.



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Passenger Focus is the operating
name of the Rail Passengers Council