

**Transport for London**



**London Politicians Report  
2012**

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- These charts present the full findings of a survey of London Councillors and GLA Members for TfL.

- **Methodology details:**

- Number of respondents: 22
- Contact method: Telephone
- Response rate: 45% (L.Y. 54%)
- Average interview length: 26 minutes (L.Y. 25 minutes)
- Fieldwork Dates: 7th November – 6th December 2012

- **Sample profile**

- GLA: 10
  - Constituency members: 6
  - London List members: 4
- Councillors: 12
  - Labour: 5
  - Conservative: 5
  - Other: 2

- Data are based on all answering unless otherwise indicated
- Where percentages do not sum to 100, this may be due to rounding, multiple responses or the exclusion of don't know and/or neutral categories
- Please note that base sizes are very small. It is not uncommon to see large jumps in percentages, so data must be treated with caution

# Executive Summary

# Top 4 key findings from the research

- **Favourability and advocacy towards LU has improved. LU is seen to be 'on the way up'**
  - Net favourability is at +73% and net advocacy is at +36%. Both scores represent a four-year high
  - 73% think it is an organisation on the way up and none think it is on the way down
- **Perceptions of the overall level of service have improved considerably and there has been an increase in mentions of this as a key strength**
  - Top ratings of seven or more out of ten have jumped 36 points to 86%
- **Perceptions of managing works and closures have improved substantially**
  - Scores are up from 41 to 63 out of 100 since 2011.
- **77% agree LU is making real travel improvements through investment and 95% think maintaining investment is extremely/very important**
  - Reliability, frequency, improved infrastructure, stations and trains are cited as evidence
  - But, perceptions of the value for money investment represents and the planning and focus of investments are relative weaknesses

# **Summary of Key Findings and Implications**

- LU's standing has greatly improved. Net favourability (+73%) and net advocacy (+36%) are at the highest levels recorded in four years.
- Perceptions of the overall level of service have notably improved, where ratings of seven or more out of ten have risen by 36 percentage points to 86%.
- 73% agree that LU is an organisation on the way up. The improvements resulting from investment in upgrades have clearly impressed.
- Overall ratings on the reputation drivers remain stable. However, scores on managing works and closures in particular have improved considerably, where the mean score has risen from 41 to 63 over the year. This may be partly due to fewer planned closures and engineering works due to the Olympics and the Diamond Jubilee.
- The main perceived service improvements are reliability and frequency of service, along with infrastructure improvements such as new signalling, stations and rolling stock as evidence of the investment made in the Underground.

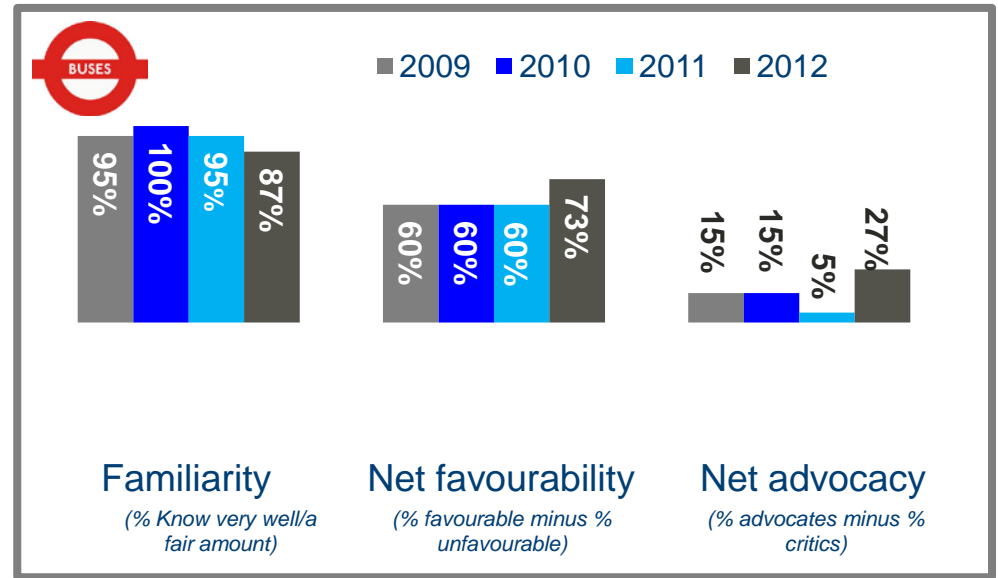
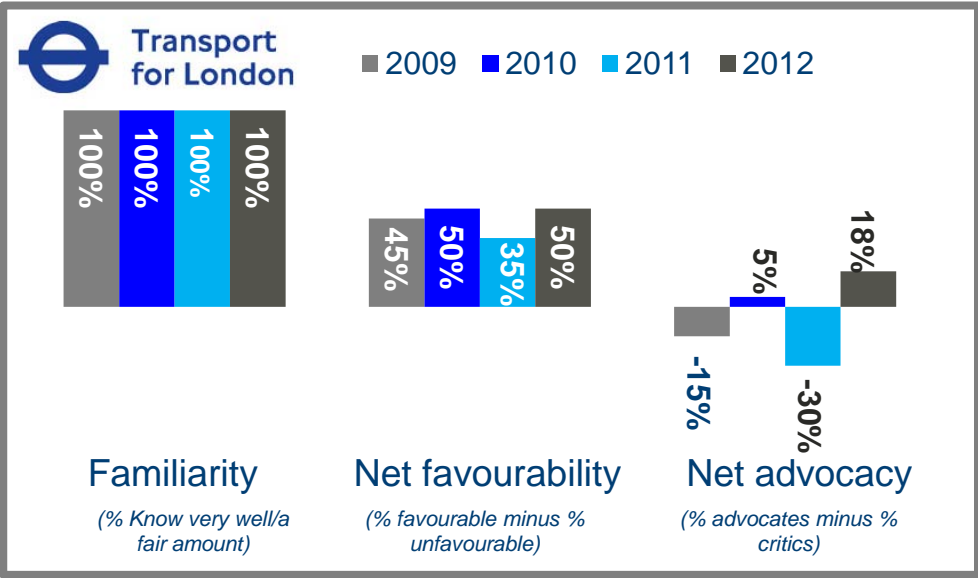
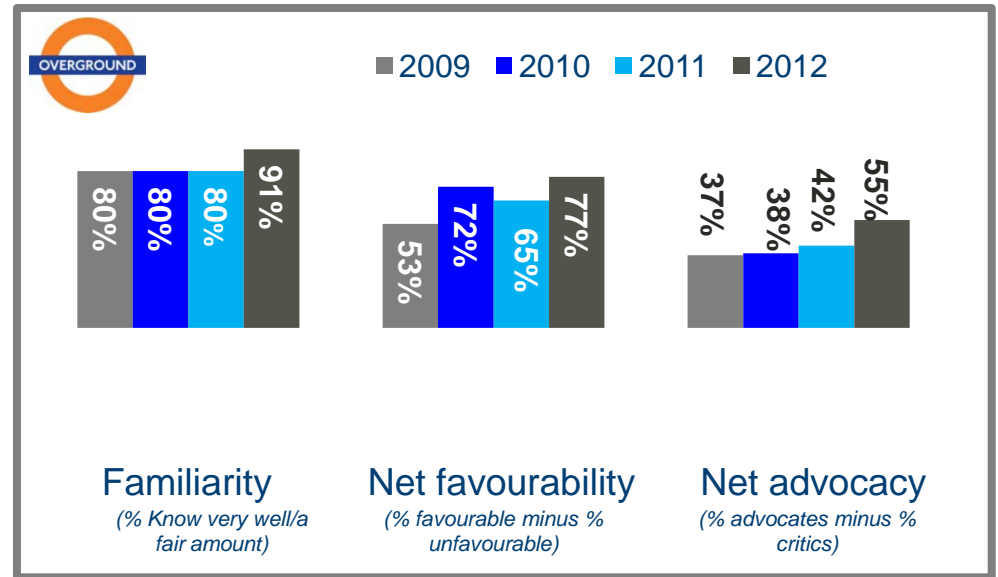
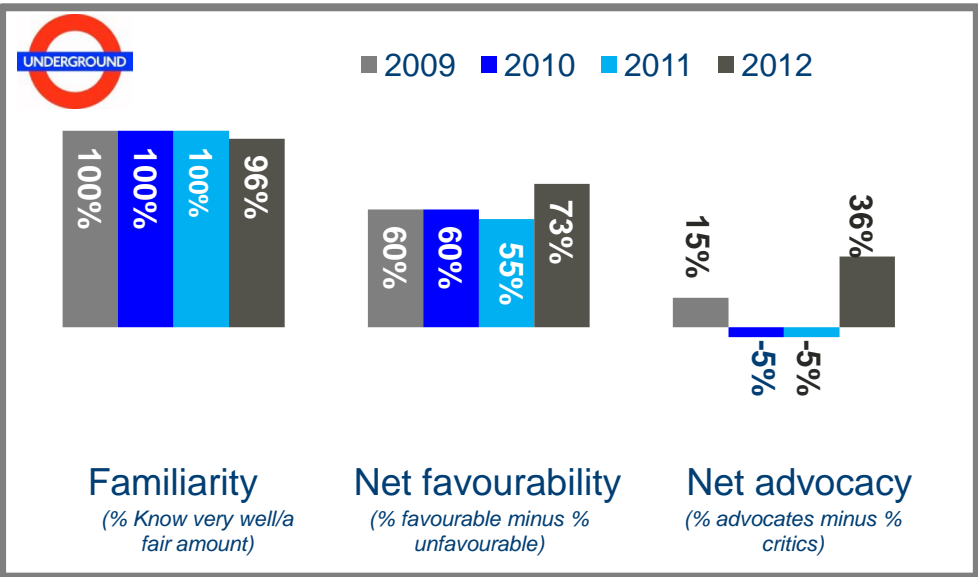


- LU is more likely than in the past to be seen to achieve the right balance between making investments and improvements while keeping fares and travel disruption to a minimum.
- The majority (77%) agree that LU is making real improvements to the service through this investment.
- Despite improving scores, the investment and improvement programme also has the potential to undo some of the reputational gains this year.
  - Underinvestment over time, some concern about the focus of investments are the top perceived weaknesses.
  - The impact of improvement works is also a relative weakness. With the resumption of planned works and closures post-Olympics, there is a possibility that scores will drop in 2013.
- Providing good value for money is the weakest reputation driver measured, with a mean score of 55. This may be partly due to a lack of knowledge on this issue; when asked if the investments represent good value for money, many were unable to comment in much detail. Politicians may also consider issues such as fares when thinking about this aspect.

- The rating of open communication about future plans, is relatively weak (with a mean score of 60), indicating an appetite for more information on planned investments.

- Further communications around the investment programme should help maintain the positive trends in favourability.
- Communications specifically around planned works and closures, planned investments, upgrade priorities and detail on how money is spent should help allay concerns and further boost LU's standing, particularly given ratings on open communications about future plans are comparatively weak
- Continuing to highlight service reliability and improvements made over the last few years would help to maintain positive views of LU as it continues to promote an improved approach to works and closures

# London Politicians reputational summary



# LU's reputation drivers – What LU stands for

## – Experience

What TfL stands for

Net scores	2007	2008	2009	2010	2011	2012	Chg '11-'12 ±%
Cares about its customers	53	62	64	58	66	<b>65</b>	-1
Communicates openly and honestly about its plans for the future	51	65	63	47	63	<b>60</b>	-3

Experience

Net scores	2007	2008	2009	2010	2011	2012	Chg '11-'12 ±%
Overall level of service	67	62	68	58	65	<b>72</b>	+7

# LU's reputation drivers – Value

## – Progress and innovation

$X=Y \times 2$  Value

Net scores	2007	2008	2009	2010	2011	2012	Chg '11-'12 ±%
Is a well managed organisation	56	66	66	62	64	61	-3
Provides good value for money	51	60	65	52	54	55	+1

 Progress & Innovation

Net scores	2007	2008	2009	2010	2011	2012	Chg '11-'12 ±%
Invests in new technology to improve service	n/a	n/a	n/a	n/a	65	66	+1
Is managing works and closures effectively	n/a	n/a	n/a	31	41	63	+22
Momentum (% 'Really/On the way up')	n/a	n/a	n/a	n/a	n/a	73	n/a
Momentum (% 'Really/On the way down')	n/a	n/a	n/a	n/a	n/a	0	n/a

# LU's reputation drivers – Trust



Net scores	2007	2008	2009	2010	2011	2012	Chg '11-'12 ±%
Is an organisation I can trust	n/a	n/a	n/a	n/a	n/a	67	n/a

# **Main Findings: Reputation Measures**

Familiarity

Favourability

Advocacy



# Familiarity (key points)

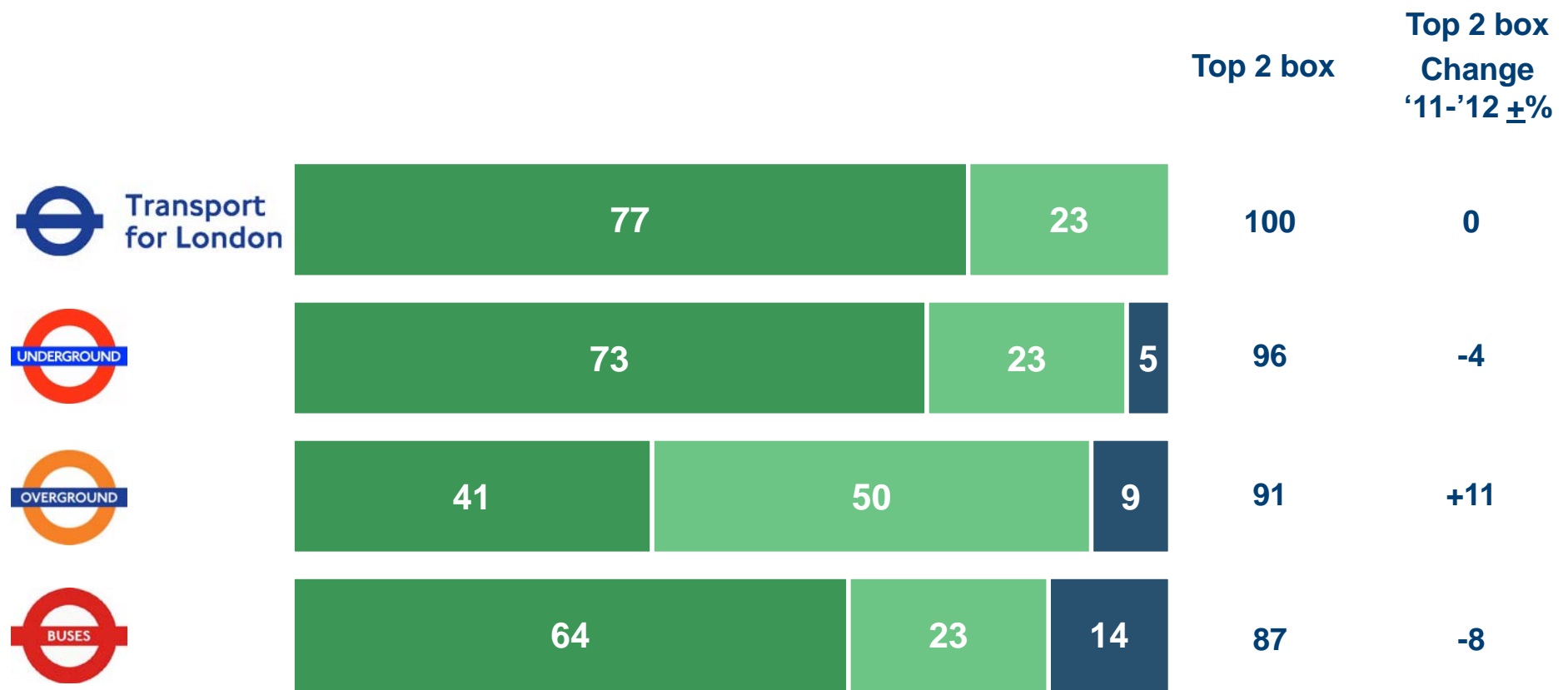


- LU, TfL and LB continue to be well known among London Politicians, with little change in levels of familiarity since last year.
- LO is also well known and there are signs that familiarity levels are rising
- Familiarity towards the external comparators has dropped across the board, most notably for Eurostar.

# Familiarity with LU, TfL, LO and LB



■ % Know very well    
 ■ % Know a fair amount    
 ■ % Know just a little    
 ■ % Heard of but know nothing about    
 ■ % Never heard of



Q How well do you feel you know...?

Base: All London Councillors and GLA Members interviewed in 2012 (22); 2011 (20)

## Know very well/a fair amount

	2011	2012	Change '11 – '12
	%	%	±
Transport for London	100	100	0
London Underground	100	96	-4
London Overground	80	91	+11
London Buses	95	87	-8
Network Rail	90	77	-13
Eurostar	80	50	-30
British Airways	75	63	-12

Q How well do you feel you know...?

Base: All London Councillors and GLA Members interviewed in 2012 (22); 2011 (20)

# Favourability (key points)

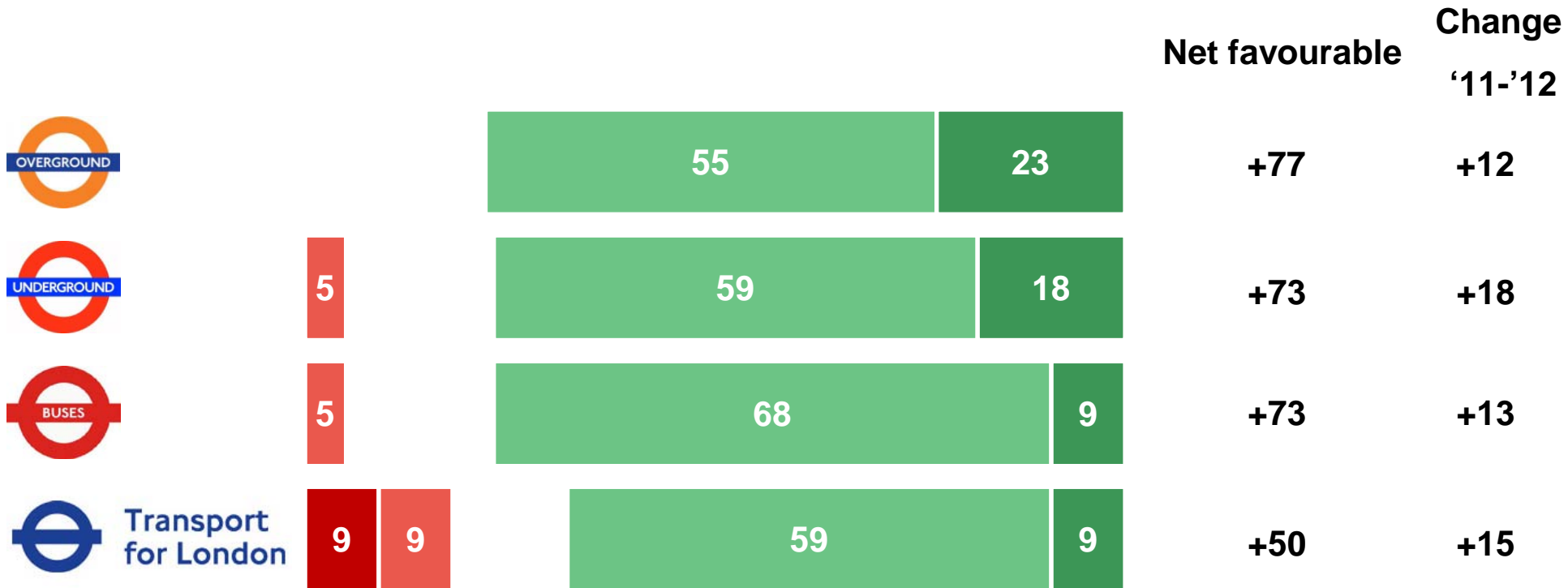


- LU, LO, LB and TfL have all seen increases in favourability this year.
- Net favourability towards LU has risen by 18 percentage points over the past 12 months, to +73%.
- This is the highest score LU has achieved since 2008, when the net score was +80%.
- LO and LB consolidate their positions and attain their highest favourability scores yet, with net scores of +77% and +73% respectively.
- TfL recovers after a dip in favourability in 2011. Net favourability is at +50%, up 15 percentage points and back in line with 2010 levels.

# Favourability - 2012



■ % Very unfavourable    
 ■ % Mainly unfavourable    
 ■ % Mainly favourable    
 ■ % Very favourable



Q How favourable or unfavourable is your overall opinion or impression of....?

Base: All London Councillors and GLA Members who have heard of the organisation and have an opinion on favourability (22)

# Favourability change 2011-2012



## Favourable

	'11	'12	Change '11 – '12 ±
	%	%	
LO	65	77	+12
LB	70	77	+7
LU	60	77	+17
Eurostar	69	73	+4
TfL	60	68	+8
BA	25	36	+11
Network Rail	40	27	-13

## Unfavourable

	'11	'12	Change '11 – '12 ±
	%	%	
LO	0	0	0
LB	10	5	-5
LU	5	5	0
Eurostar	5	9	+4
TfL	25	18	-7
BA	40	36	-4
Network Rail	15	9	-6

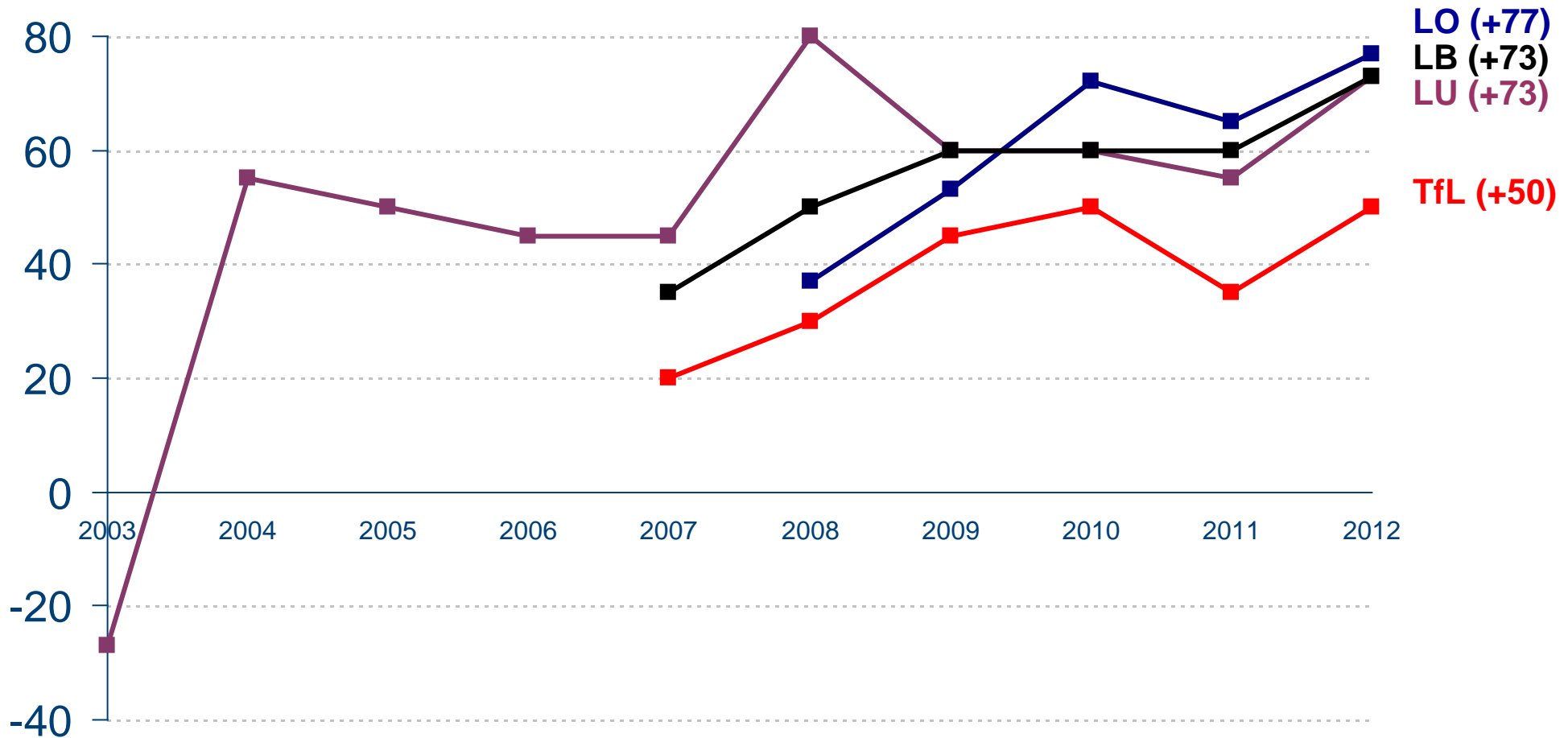
Q How favourable or unfavourable is your overall opinion or impression of....?

Base: All London Councillors and GLA Members who have heard of the organisation and have an opinion on favourability in 2012 (22 for all); 2011 (19 for Eurostar, 20 for all others).

# Net favourability trends

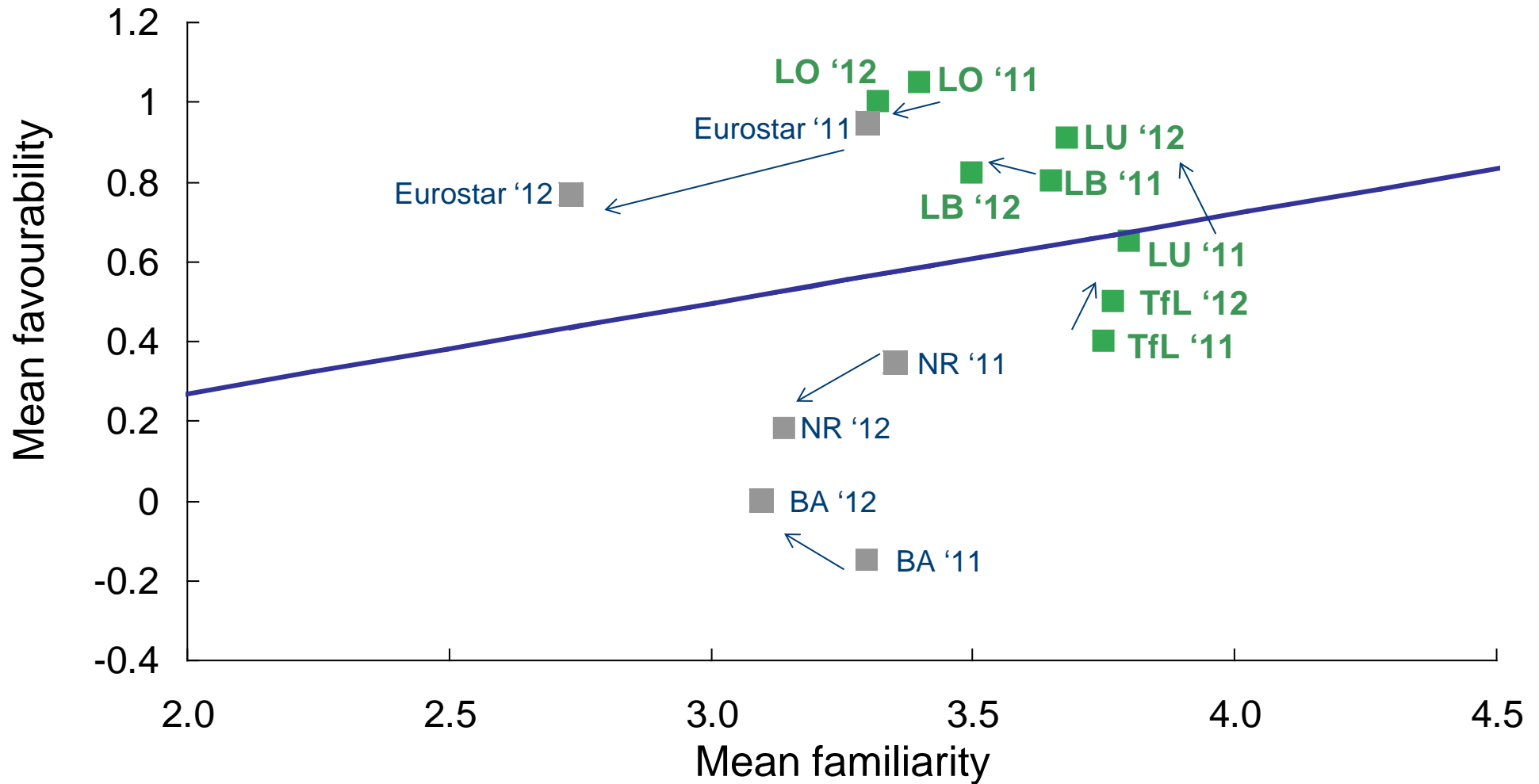


## ±% Net favourability scores



Q How favourable or unfavourable is your overall opinion or impression of...?  
Base: All London Councillors and GLA Members who have heard of the organisation and have an opinion on favourability (22)

# Relative position of organisations - 2012

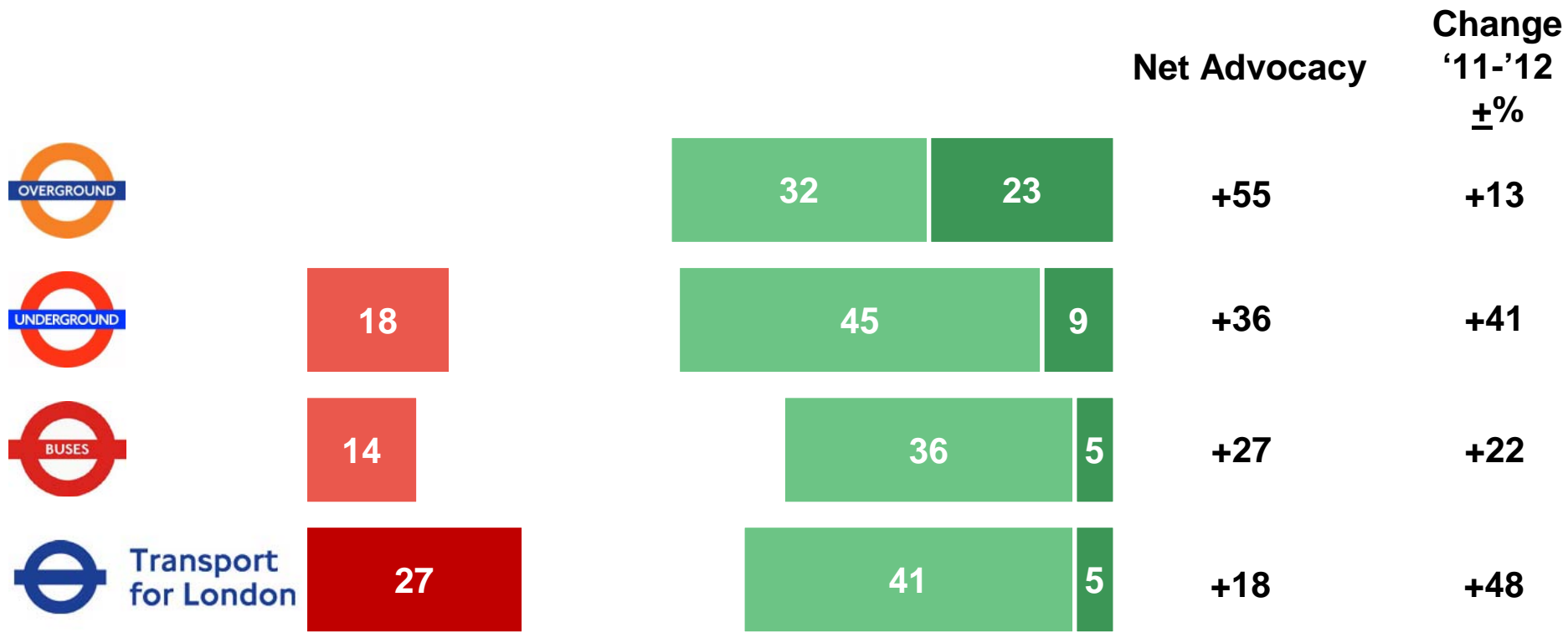


Base: All London Councillors and GLA Members who have heard of the organisation and have an opinion on favourability (22 for TfL, LU, LB, LO, Network Rail and British Airways and Eurostar), 2012







- LU, LB, LO and TfL have made notable improvements on advocacy. London Politicians are more likely than ever to champion each organisation.
- Net advocacy for TfL has risen by 48 percentage points to +18%. While this score trails behind LU, LO and LB, it represents a huge improvement and is higher than any of its scores previously recorded on this survey.
- LU sees a similarly positive movement on advocacy. Net advocacy has risen by 41 percentage points to +36%, just ahead of the previous peak of +30% back in 2007.
- Both LB and LO have also seen improvements in advocacy, though the shifts in opinion are muted compared with LU and TfL.
- Nonetheless, LO is clearly very well regarded. It has made consistent year-on-year gains and now outperforms LU, TfL and LB with a score of +55%.
- LB has also seen a solid improvement in advocacy with a 22 percentage point jump from +5% to +27%; just behind the high of +30 in 2007.
- \* Please note that the base sizes are small, and therefore it is not uncommon to see large jumps in the data. Nonetheless, it is still promising that scores are moving in the right direction.

■ % Critical without being asked    
 ■ % Critical if asked    
 ■ % Speak highly if asked    
 ■ % Speak highly without being asked



Q Which of these statements best describes your attitude towards...?

Base: All London Councillors and GLA Members who have heard of the organisation (22 for all organisations)

	Net Advocacy*		
	2011	2012	Change
	%	%	'11 – '12
			±
 OVERGROUND	+42	+55	+13
 UNDERGROUND	-5	+36	+41
 BUSES	+5	+27	+22
 Transport for London	-30	+18	+48

\* Net of “Would speak highly” minus “Would be critical of”

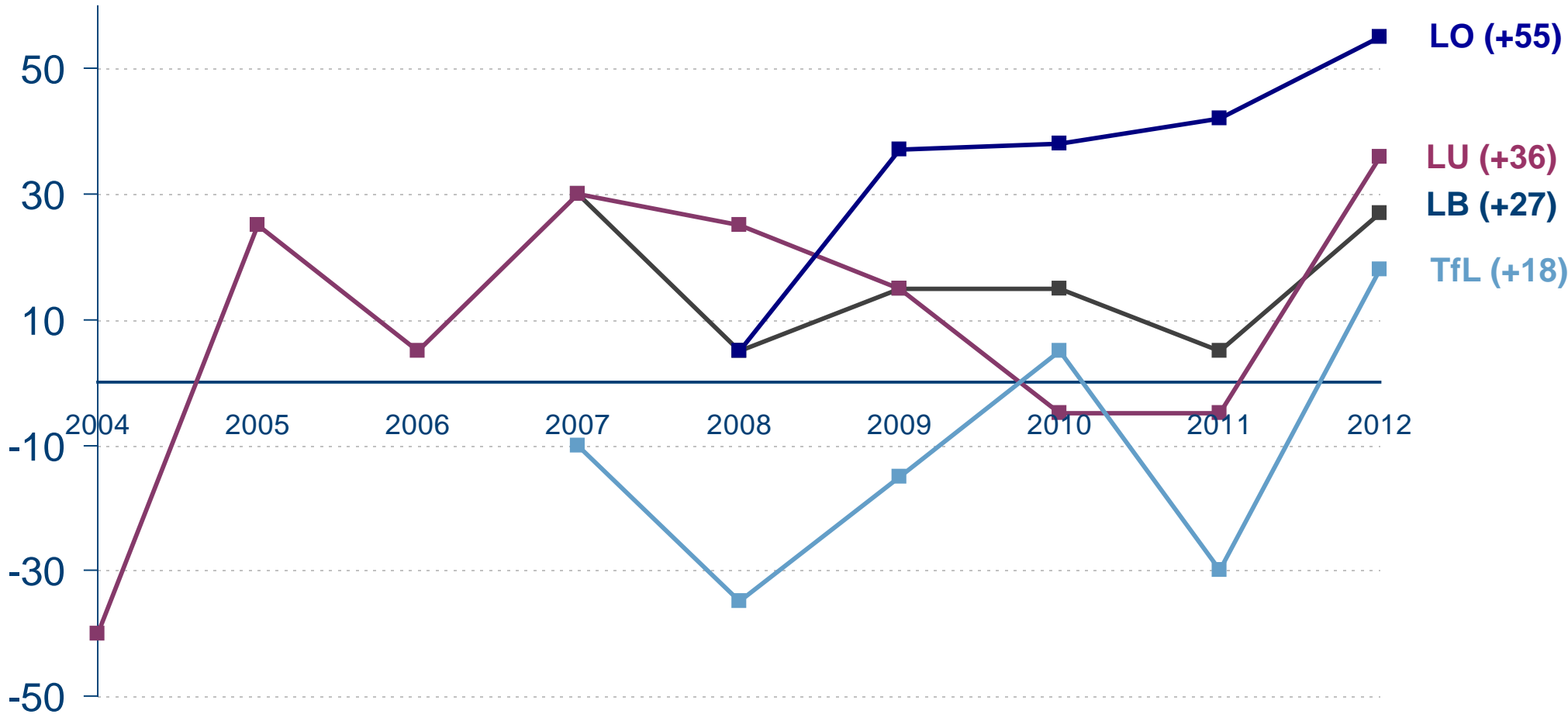
Q Which of these statements best describes your attitude towards...?

Base: All London Councillors and GLA Members who have heard of the organisation and have a view on advocacy. 2012 (22 all organisations); 2011 (19 for LO, 20 for all others).

# Net advocacy - trends



## ±% Net advocacy scores



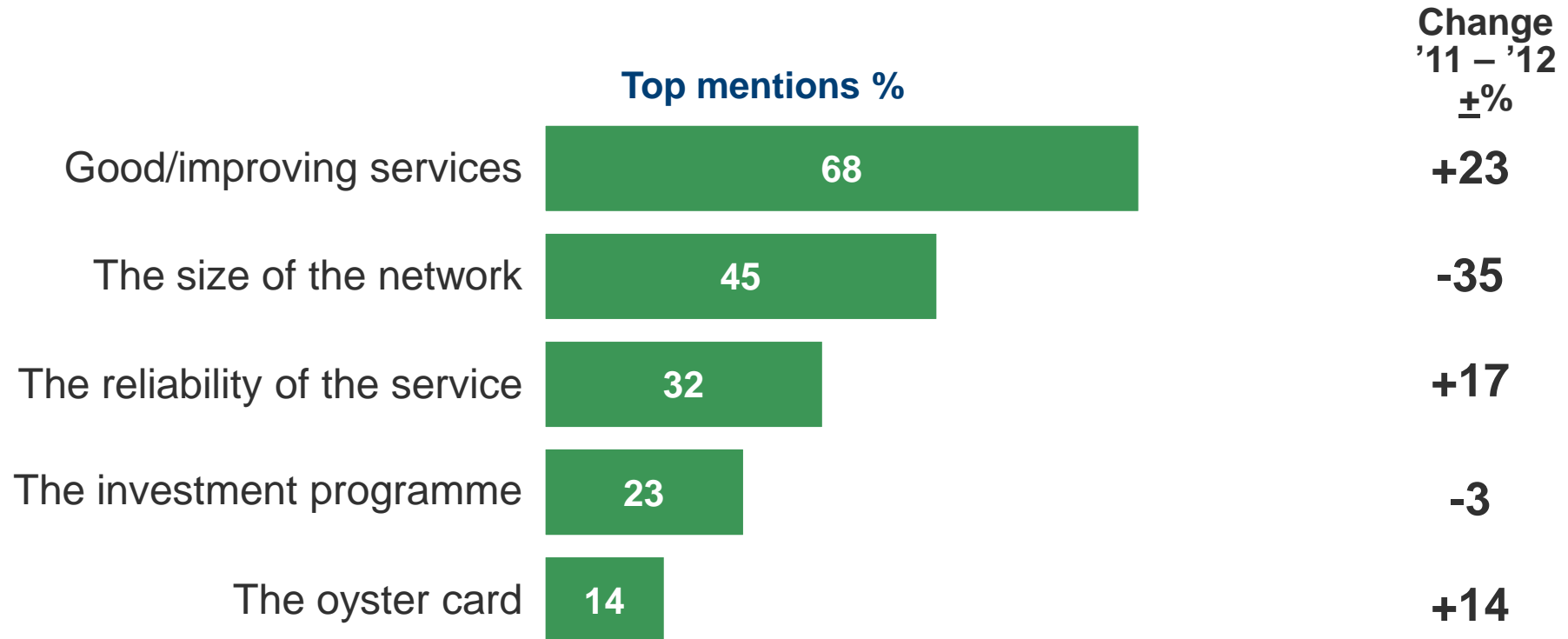
# **LU's strengths & weaknesses**

# Strengths (key points)



- London Politicians note an improvement in LU's service this year and nearly seven in ten see this as one of its strengths.
- As in previous years, the size and coverage of the network is seen as a key strength, despite signs that this is less top of mind this year.
- Investments and upgrades have clearly been noticed, with more now likely to feel that these improvements have had a positive effect on the overall level of service, particularly on reliability.
- The quality of the service seems to have had a positive impact on perceptions of LU.

# LU's major strengths - spontaneous



**Good/improving services, reliability and the oyster card receive more mentions this year**

Q What would you say are LU's major strengths...?

Base: All London Councillors and GLA Members interviewed in 2012 (22); 2011 (20).

# LU's major strengths – verbatim comments (1)



## Good/improving services

*“I think they’ve improved their reliability and they’ve managed to get their way through the London Olympics quite well. So I think overall their day to day performance has got better.”* **GLA, Labour**

*“They run a complex network most of the time, fairly well. And that their brand is well known and respected.... it’s a complicated network, it’s old, they’ve been doing upgrades and whatever, they run most of the time and when they have to, over the summer, they ran for the Games, a really good service.”* **GLA, Other**

*“I think there’s an improving quality of service...a secure investment programme. Fairly good safety record...”* **GLA, Labour**

*“I think frankly they’ve been improving in recent years because the upgrades have helped a great deal. And that is beginning to bite now, the upgrades, the trains are running properly and certainly running to time...As more highly developed signalling goes in then they will run even better.”* **GLA, Conservative**

*“Right, improving service, improving reliability, good upgrades.”* **GLA, Conservative**



# LU's major strengths – verbatim comments (2)



## Size of the network/coverage

*“...that it exists is good and I think it’s reasonably extensive, the areas that are covered.”* **Cllr, Conservative**

*“Their major strengths are that they have a good network around London.”* **Cllr, Conservative**

*“Frequency of trains are its strength, and range of destinations.”* **Cllr, Conservative**

*“Major strengths is the frequency of the travel, the amount of area they cover and also the newer trains are a vast improvement on the older kit.”* **Cllr, Labour**

## Reliability

*“I think the coverage of a vast area. There is general reliability, I know they’ve had some problems, but generally you can rely to go down and get a Tube and it will be there and that’s the two things I think are the most positive about them really.”* **Cllr, Labour**

*“I would say their reliability’.* **Cllr Labour**

*“They’re just there. They’re reliable.”* **GLA, Labour**

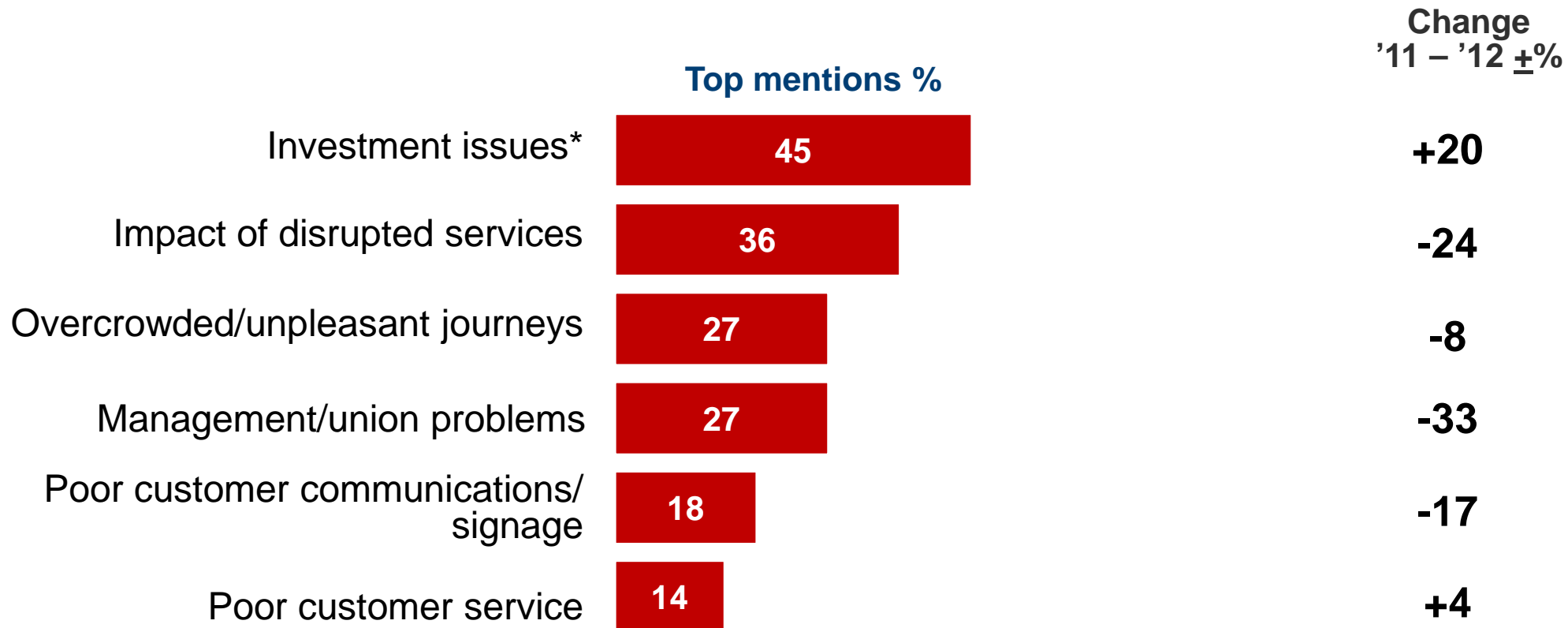
# Weaknesses (key points)

- Perceptions of investment in LU are largely positive, however, just under half still see issues around investment (such as a lack of and/or cost of investment in some areas) as LU's main weakness.
- Much of this concern focuses on lines yet to benefit from upgrades.
- Improvements to stations and rolling stock on some lines have been noticed, but older lines still awaiting improvements are a cause for concern, alongside the postponement of other improvements. The dropping of some projects to improve accessibility and the delay or postponement of the Piccadilly line upgrades are examples of this.
- The impact of service disruption is a concern for around one in three. These individuals feel that when delays or other problems occur, there is generally a large impact on the journey experience, including sometimes the ability to complete journeys.
- Perceptions of management problems and the relationship with the unions are in decline. However, advocacy for driverless trains as an investment focus is gaining traction.

## Weaknesses (key points - 2)

- The quality of customer communications and customer service are again among the top mentions of weaknesses, though only represent the views of a minority. There concerns are mostly about the provision of timely customer information when delays occur.
- Overcrowding and unpleasant journey experiences also continue to colour opinion, though there are indications this is becoming less of an issue.

# LU's major weaknesses - spontaneous



\* Investment issues include some perceptions of a general lack of investment, but also some concerns about the cost of investment

## Investment issues

*“I think this is a residual problem of lack of investment over many decades, it hasn’t renewed the track, the trains and the stations, which is essentially what the Tube is. I mean you look at the Jubilee Line and that is up to date, the stations are wonderful, well lit, the trains are modern but if you look at this on some of the old lines, they’re running on tracks that’s a hundred years old and trains that are probably 30 or 40 years old.”*

**Cllr, Labour**

*“Just how they run the railway, the costs are very high and in terms of when they do major works and other stuff they just seem to operate in their own sort of financial bubble rather than the reality of what most other worldwide underground networks and railways around the world have to deal with and I think they need to, and they’re starting to learn to, you know, not ‘gold plate’, if I can put it like that.”*

**GLA, Other**

*“Oldest bits of the system have been neglected and what I mean by that is that we’re celebrating the 150<sup>th</sup> anniversary of the Tube system and I do think the bit between Paddington to certainly Baker Street if not all, well not all the way through to Farringdon, should have been one of the earliest bits to have been worked on in the, on the line upgrades. **GLA, Labour***

## Impact of disrupted services

*“When something happens its impact is huge because for instance, I was caught up in a Jubilee incident the other day and so you have to reroute yourself out to get in...So, when it gets wrong, it can have a huge impact.”*

**GLA, Labour**

*“When it goes wrong it goes wrong, obviously that is a real nightmare when people get stuck on the train or the trains get cancelled or there isn’t sufficient alternative provision.”*

**GLA, Conservative**

*“I think the ongoing works which, you know the disruption due to ongoing works and generally the sort of, some of their infrastructure is out of date and I think those two are interlinked in a sense ... you know, the trains are old, the stations are old.”*

**Cllr, Labour**

# Weaknesses – verbatim comments (3)



Overcrowding/unpleasant journeys

*“The Northern Line is extremely overcrowded, often going to a morning meeting I have to wait for three trains to go before I can even get on, so it’s very, very congested, particularly in the morning peaks. And when things go wrong they go very wrong, so really people have told me about having to walk along the Tube tunnel and that kind of thing which I think, in this day and age, we shouldn’t have people doing that.”*

**Cllr, Labour**

*“Overcrowding at peak times, or quite a few times really. Overcrowding and lack of accessibility for many and I think there’s lack of services in/out of London in terms of sort of almost all routes really around the periphery of, talking in terms of talking about outer London boroughs so you have to go in on yourself before you can out.”***Cllr, Labour**

*“I couldn’t personally think of a single thing in the world that would attract me down to a Tube station unless I had to use it... I just find it uncomfortable, crowded ... uncomfortable, hot, clammy, crowded, particularly in my experience when I used to have to use the Tube.”* **Cllr, Conservative**

## Management/Union problems

*“The fact that the drivers still can go on strike and therefore stop driving which means unreliability, is really bad, so you can’t guarantee that the Tubes will be running. So I’m for driverless trains and so on so that can’t happen.”* **Cllr, Conservative**

*“I think that the unions play a game at the cost of residents. I don’t think they understand that when they take members out on strike the effect it has not just on the people who are not working on that day i.e. the rail, train drivers themselves but the many, many families who have to suffer because of their attitude.”* **Cllr, Conservative**



## Poor customer communications

*“Lack of communication when something is going wrong. Like often the boards are flashing or not working, or you’re waiting there but nobody seems to know what’s going on, when a simple announcement might be helpful, particularly on the platform as opposed to inside the train.”*

**Cllr, Labour**

*“Sometimes when there are delays the drivers don’t keep us well enough informed for the reason for delay but I don’t know how one will categorise that.”* **GLA, Conservative**

*“Well it’s curious really. Yesterday, for example, going to Westminster I found myself using a different route to get through and I did find the signing, it’s OK, but if I hadn’t have known more about it and if I was perhaps a tourist I think I’d have been lost. I don’t know whether they’re all the same because there are only certain stations that I use. I’m not sure about their ability to sign to everyone what they want and certainly knowing where you get out is one of the problems...I just feel they could be a bit more helpful.”*

**Cllr, Other**

## Communications – other

*“I don’t think they are great communicators, I don’t think they are particularly sensitive or customer aware. I get fed up of suggesting things to them and then basically takes them five years to consider the possibility that anybody might have anything to say to them. They finally got round to doing a little bit of softer improvements on information and customer care around the Olympics but they’re not interested in outside commentary, but they finally got there when circumstances forced them into it.”* **GLA, Labour**

# **LU's Performance on Reputation Drivers**

# Reputation Drivers - summary



■ 2012 ■ 2011

Mean Score (Out of 100)

Communicates openly about its plans for the future



Cares about its customers



Overall level of service



Is a well managed organisation



Provides good value for money



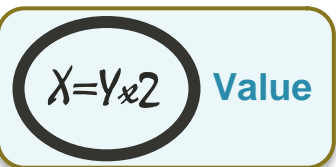
Manages works and closures effectively



Invests in new technology to improve service



Is an organisation I can trust

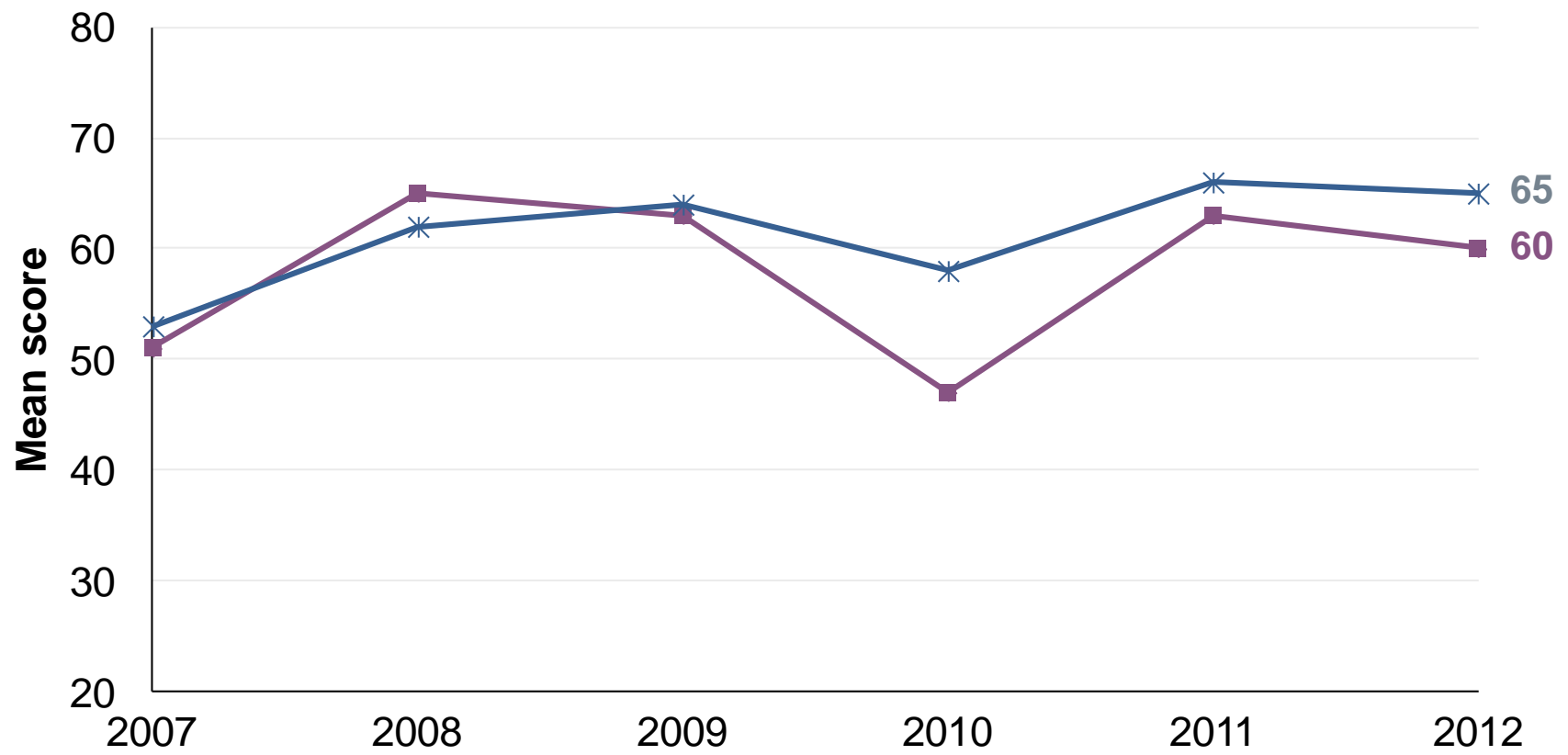


- The metrics for the reputation driver ‘what LU stands for’ have seen little movement since 2011. ‘*Communicates openly about its plans for the future*’ and ‘*cares about its customers*’ remain largely unchanged and continue to hold their position after a decline in ratings back in 2010.

# Reputation Drivers – What LU stands for



Communicates openly about its plans for the future Cares about its customers



Q Using a scale of 0-10, to what extent do you agree or disagree that LU...?  
Base: All London Councillors and GLA Members interviewed in 2012 (22), 2011 (20), 2010 (20); 2009 (20); 2008 (20); 2007 (20). Don't knows excluded.


# Experience - Perceptions of LU's service (key points)



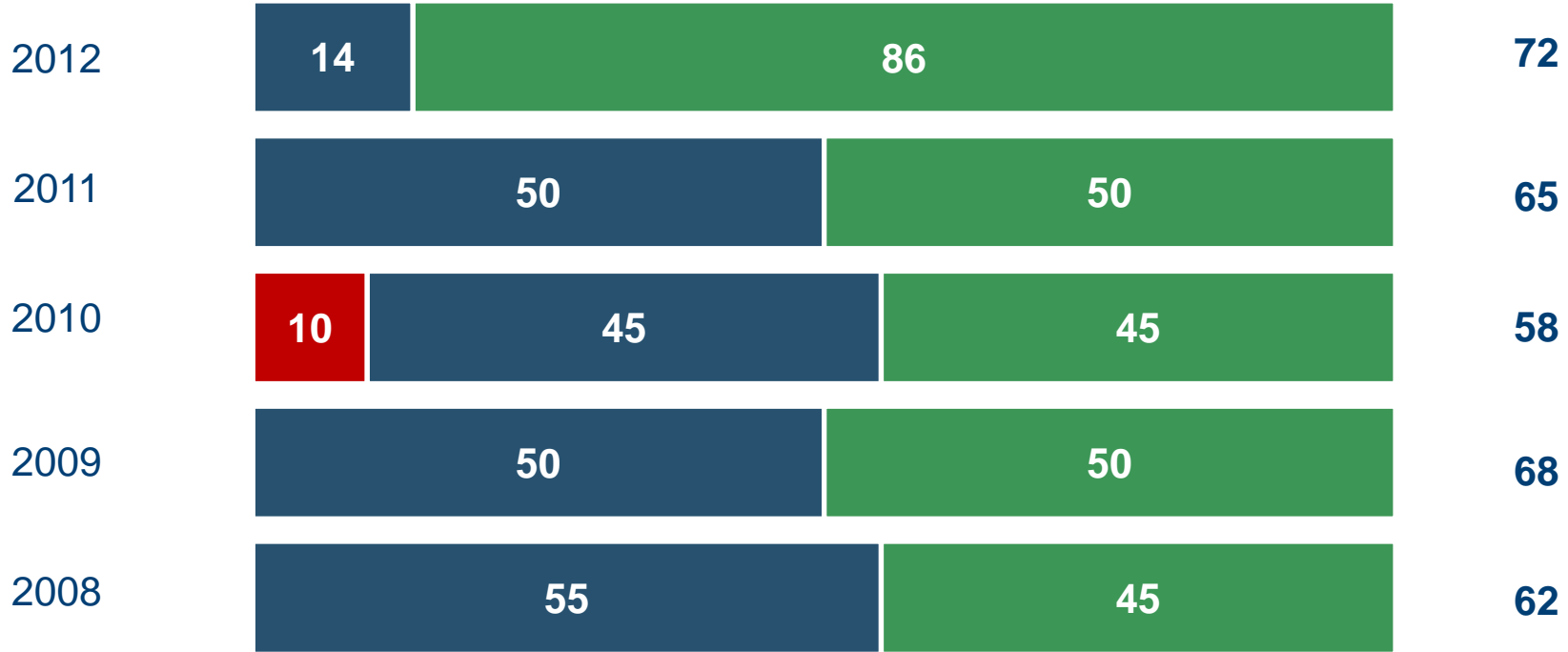
- Views of the overall level of service offered by LU are extremely positive. Over four in five give a rating of seven to ten for the overall level of service it provides, while the rest (14%) rate it between four and six out of ten.
- This is an impressive improvement (though not strictly significant due to the small base size) on previous years, and represents a 36-point increase in the proportion rating it highly since 2011.
- Views are slightly more muted when asked if the service has improved, stayed the same or got worse in the past year. The proportion saying it has improved is static, though now just five percent feel the service has deteriorated, which is a considerable drop (down 30%) since last year. Just under half say that it has stayed the same.

# Experience - Ratings of LU's overall level of service



 Experience

■ % 0-3     
 ■ % 4-6     
 ■ % 7-10     
 Mean Score (out of 100)



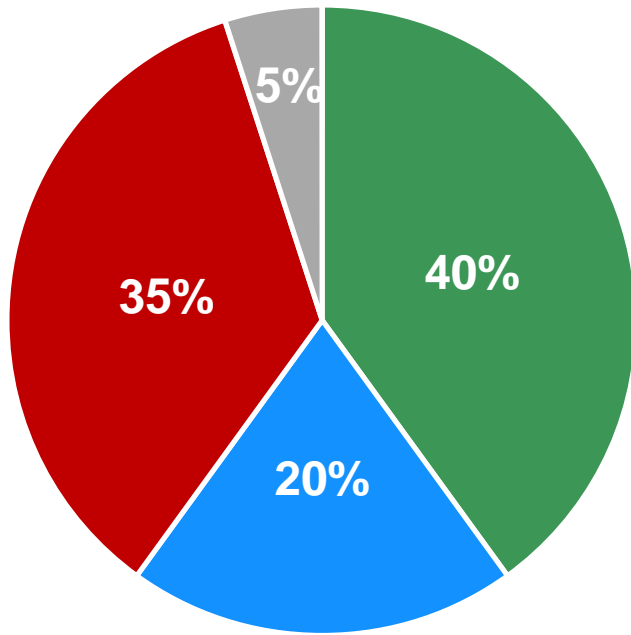


# Experience - Perceived changes in overall service offered by LU

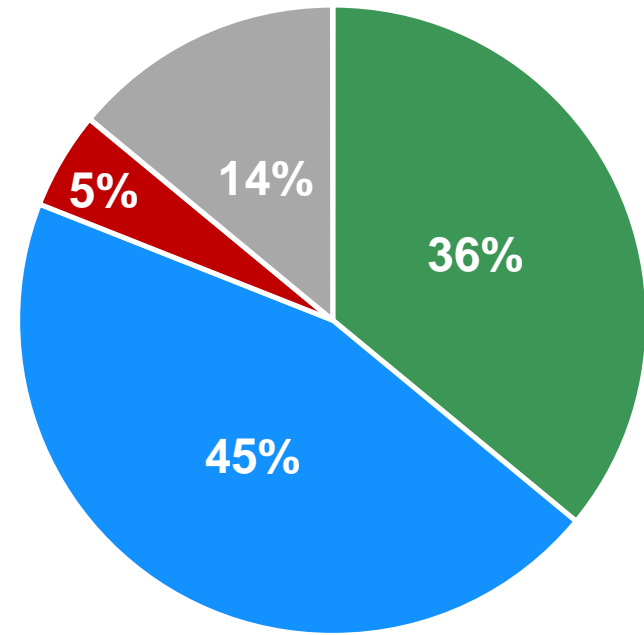


## Experience

■ Improved    ■ Stayed the same    ■ Got worse    ■ Don't know



2011



2012

Q Would you say that the overall level of service which London Underground offers has improved, stayed the same or got worse in the past year?

Base: All London Councillors and GLA Members interviewed in 2012 (22); 2011 (20).

# Reputation Drivers – Value (key points)



50

- The metrics *'Is a well managed organisation'* and *'provides good value for money'* are static, with little change over the past two years.
- Mean scores on value for money remain low and this is now the weakest of the metrics.

# Reputation Drivers - Value



$\chi = Y \times 2$  Value



Q Using a scale of 0-10, to what extent do you agree or disagree that LU...?

Base: All London Councillors and GLA Members interviewed in 2012 (22), 2011 (20), 2010 (20); 2009 (20); 2008 (20); 2007 (20). Don't knows excluded.

# Reputation Drivers – Progress and innovation (key points)



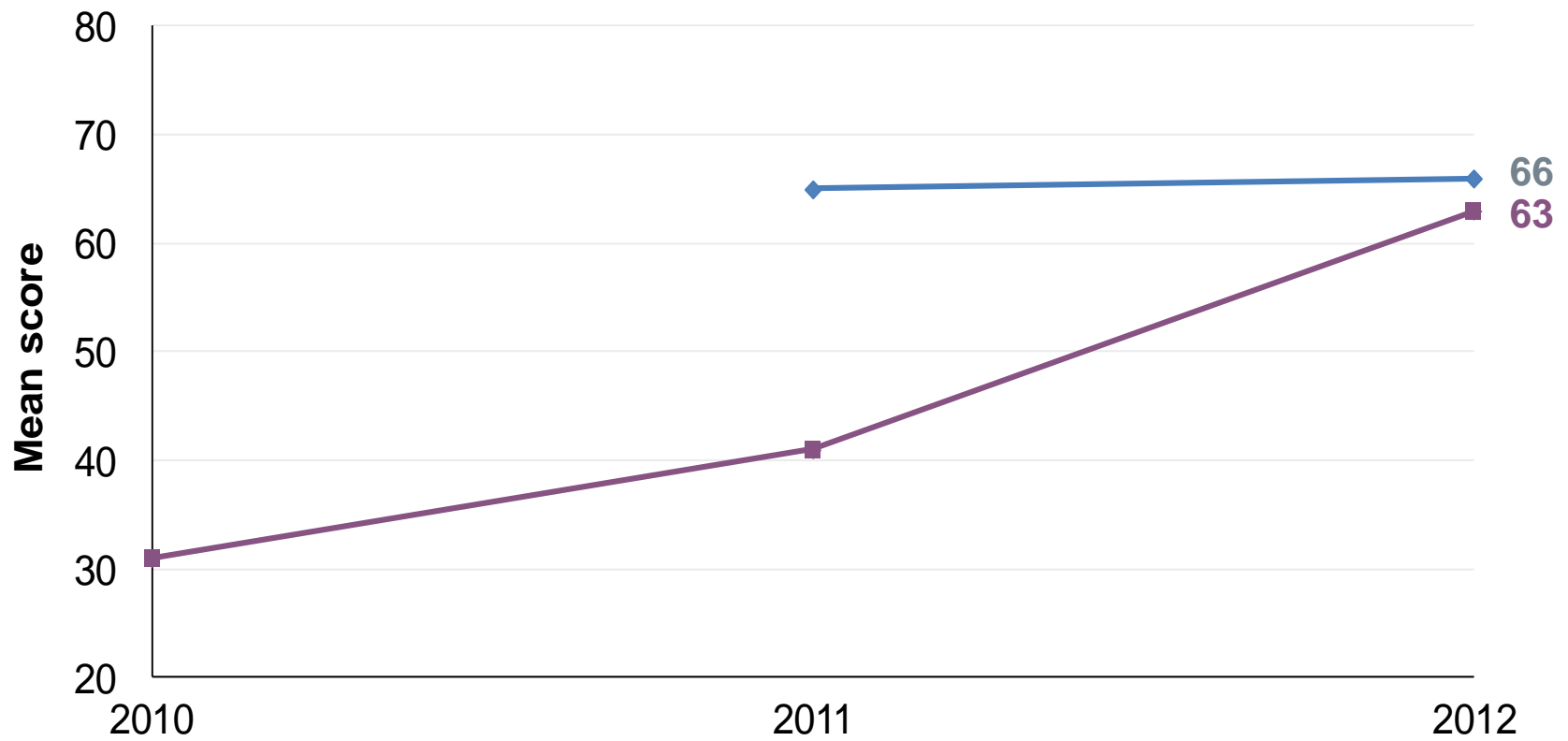
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- There has been little change in views of each of the reputation drivers for LU, with no notable shifts in opinion over the last 12 months, with one exception; effective management of works and closures.
- Scores for '*manages works and closures effectively*' have jumped by 22 points to 63. This is impressive, as over the past two years, this metric has consistently had the weakest performance of those measured.
- Alongside strong scores for '*investment in new technology to improve the service*' (which attains a mean score of 66), and given nearly three quarters feel that LU is an organisation that is *on the way up*, progress and innovation is currently one of the stronger drivers of LU's reputation.

# Reputation Drivers – Progress and innovation



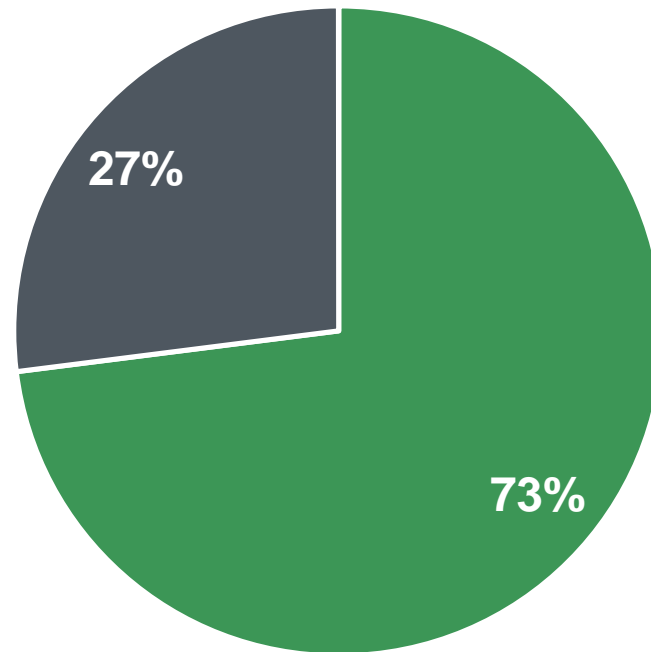
■ Manages works and closures effectively    ◆ Invests in new technology to improve service



Q Using a scale of 0-10, to what extent do you agree or disagree that LU....?  
Base: All London Councillors and GLA Members interviewed in 2012 (22), 2011 (20), 2010 (20); 2009 (20); 2008 (20); 2007 (20). Don't knows excluded.



■ On the way up ■ Not moving



Q At any time, organisations can be on the way up, others not moving and others on the way down. Based on your experience and perceptions, which of the following statements best describes London Underground?

Base: All London Councillors and GLA Members interviewed in 2012 (22)

# Reputation Drivers – Trust (key points)



55

- The metric *'Is an organisation I can trust'* has been introduced to the survey for the first time this year. In line with the strong, positive views seen on favourability and advocacy, LU is well regarded in terms of trust, and this is one of the stronger reputation drivers.

# Reputation Drivers - Trust



56



Mean score out of 100



67

Q Using a scale of 0-10, to what extent do you agree or disagree that LU is an organisation I can trust?  
Base: All London Councillors and GLA Members interviewed in 2012 (22)



# Investment in London Underground

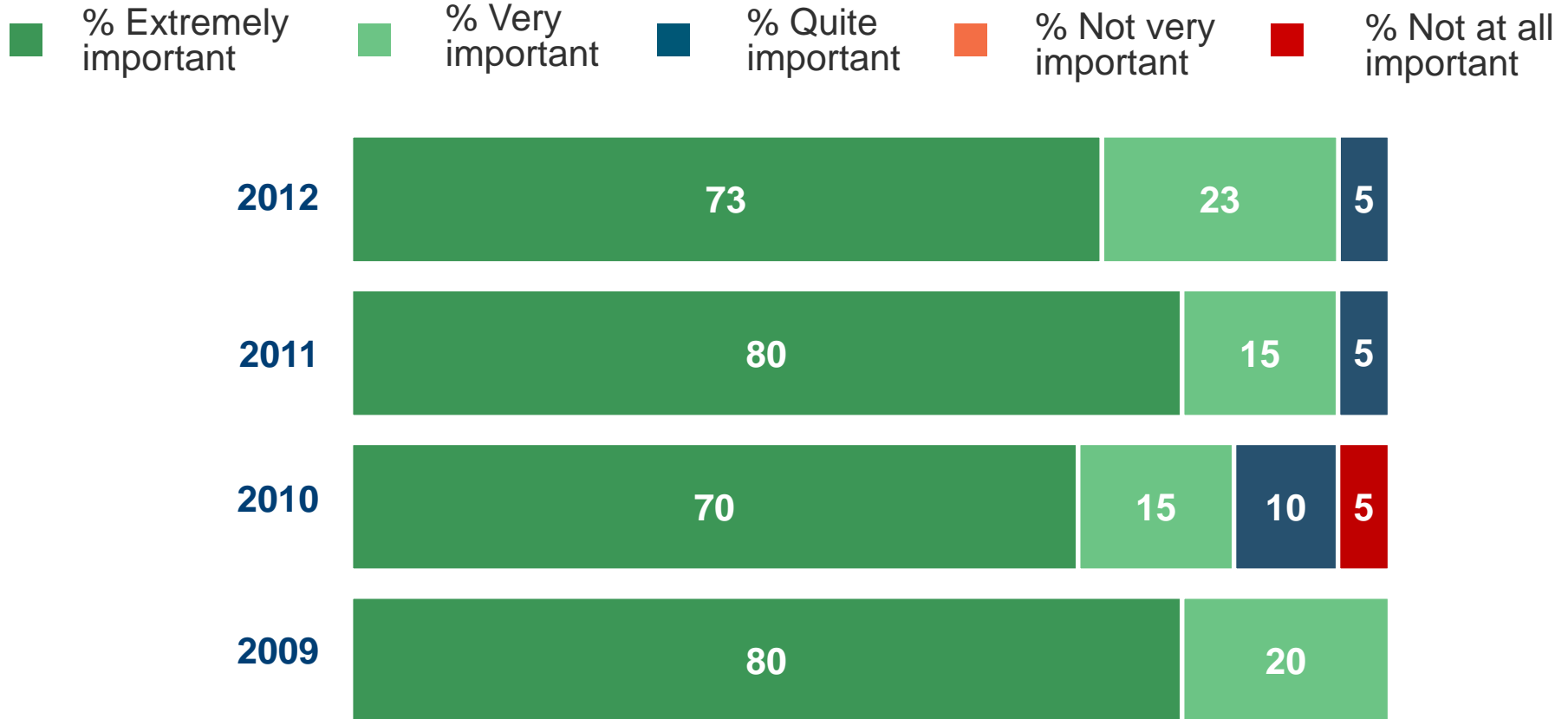
# Importance of maintaining investment (key points)



58

- There has been little change in the proportion who believe it is important to maintain the level of investment in London Underground.
- As in 2011, the vast majority feel it is 'extremely' or 'very' important to maintain investment levels (95%).

# Importance of maintaining investment



Q How important is it to London's future to maintain the planned level of investment in London Underground?

Base: All London Councillors and GLA Members interviewed in 2012 (22); 2009 - 2011 (all 20).

# Real travel improvements (key points)



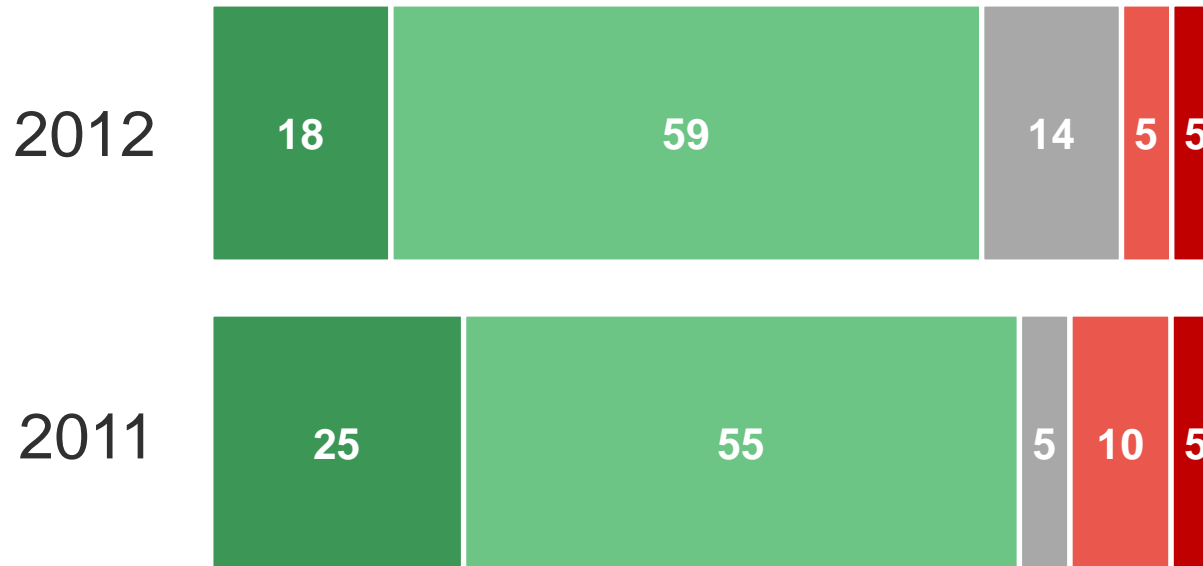
60

- There is a consensus (77% agree) that LU is delivering real travel improvements through investment.
- This is supported by clear improvements cited as a result of the upgrades, such as improved reliability, rolling stock, stations and infrastructure (such as signalling).

# Real travel improvements



Strongly agree Tend to agree Neither/nor Tend to disagree Strongly disagree



# Adequacy of investment over the past five years (key points)



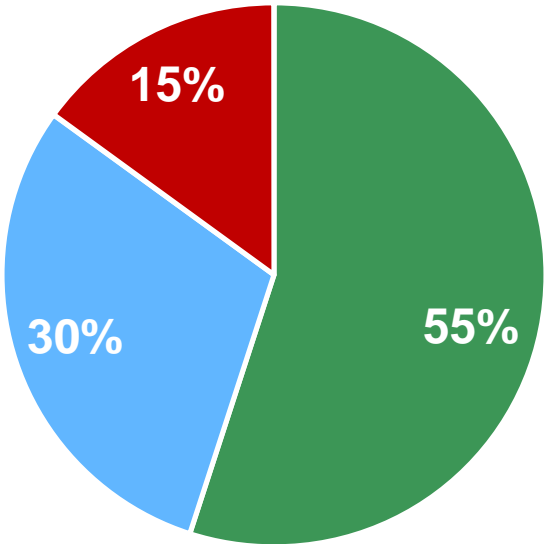
62

- London Politicians are more likely than last year to say the level of investment has been '*about right*'. Over three in four (77%) say this, compared with just over half (55%) last year.
- Few believe the level of investment has been '*too little*', and just one believes investment levels have been '*too much*'.

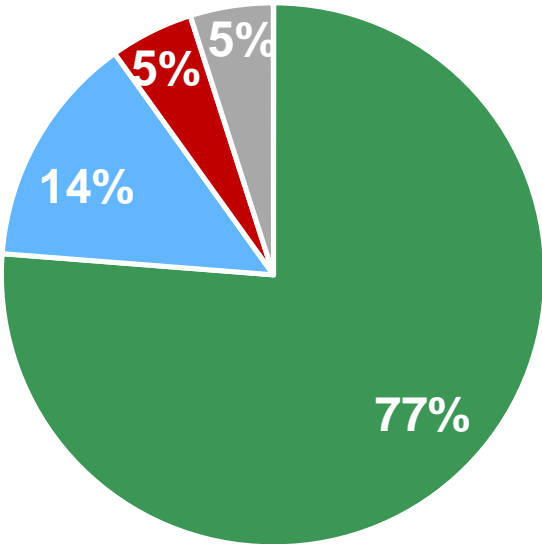
# Adequacy of investment over the past five years



■ About right   ■ Too little   ■ Too much   ■ Don't know



2011



2012

Q How would you describe the level of investment in London Underground over the past five years?

Base: All London Councillors and GLA Members interviewed in 2012 (22); 2011 (20).

# Opinion on the level of investment over the past five years (key points)



64

- Among those who feel the investment level has been about right, LU is seen to have achieved the right balance between investment and the impact on fares and service disruption this can cause.
- The investments that they are aware of are well regarded. Many feel that the organisation has done well to secure the investment, particularly in difficult fiscal circumstances.
- Many believe that the money that has been spent has been spent well and provided good value for money.
- The postponement of planned improvements or upgrades is driving opinion among the minority (14%) who believe there has been inadequate investment



# Investment levels over the past 5 years – why it has been about right



65

The balance of investment vs. trade-offs (such as increased fares or the level of travel disruption) has been about right

Investment has been vital to keep up with increased demand. It has done well to secure investment and has spent what it has had well

About right given limits on the volume of improvement works that can be carried out given the disruption involved

# Investment levels over the past 5 years – why it has been about right



The balance of investment vs. trade-offs (such as increased fares or travel disruption) has been about right

*“I think you have to **balance the difference between or the problems between putting the fares up and the continued need for investment to rebuild the infrastructure and everything on the Underground is fiercely expensive and therefore although it may be wonderful to have more money then how would you get that money other than taking it from, money isn’t, you don’t invent money, it has to come from somewhere and I think people would resent further taxes or higher fares. Therefore you have to balance the two requirements.**” GLA , Conservative*

“I think it’s a balance between giving the stock and rails upgrade but then **there’s also the balance of disruption to people mainly at weekends, having closures and things like that.** I think that’s why it’s about right. You could go faster but then there’d be more disruption to people during the weekend.” **Cllr, Labour**

# Investment levels over the past 5 years – why it has been about right



Investment has been vital to keep up with increased demand. It has done well to secure investment and has spent what it has had well

*“Because the increasing pressure from an increasing number of passengers means that, unless there is additional investment, the system won’t be able to cope with it. So the lengthening of trains, which has happened on the Jubilee, and the planned improvements to things like signalling are absolutely vital to cope with the increased demand..”* **GLA , Conservative**

*“In the present financial climate where government, and I mean local government and national government, due to debts and the cutting back, the mayor has actually done quite well finding money to invest.”*  
**Cllr , Conservative**

# Investment levels over the past 5 years – why it has been about right



About right given limits on the volume of improvement works that can be carried out given the disruption involved

*“I don’t think they could have coped with doing any more upgrades or whatever, **I don’t think Londoners would cope because you’re closing huge chunks of lines at weekends or block closures** or whatever, but I actually don’t think, now they’ve done the Jubilee and Victoria and they’ve learnt so much from that, they may be able to scale up and do a bit more.” **GLA , Other***

*“Well, **there is a limit to how much disruption and closures that can be tolerated at any one time** and I think they’ve probably been, in terms of the trade off of the cost during the work to people’s time and economy, it’s been, it’s been about right, I don’t think they could have done much more.” **GLA, Labour***

# Investment levels over the past 5 years – why it has been too little for a minority



*“The Piccadilly Line was expecting an upgrade and it hasn’t had it. It’s been put back so essentially we’ve still got an intermittent service.”*

**Cllr, Labour**

*“I think just in terms of **where it’s aimed**, I mean clearly things like signalling was a major problem and it was causing massive delays so it had to be sorted out. Last year obviously there was so many station closures most weekends that it was anybody who was relying on the Tube for a weekend had to rely on something else for much of the year. I’d say that **there’s been the investment in getting the basics right**, like the signalling which is absolutely important.... There was **a whole programme to make a number of stations more accessible and that was simply pretty much dropped** and now they’ve got these one or two stations where they’re spending a lot of money making those accessible and then forgetting about all the rest.”* **Cllr, Labour**

*“Part of the problem for me was that the Jubilee Line because it was completed in a rush the signalling was not done properly. That means that **a considerable amount of investment, that could have gone into the older lines, has had to be diverted to the Jubilee Line...** it must be ten years, it’s absolutely mad, absolute madness that it didn’t last more than, well even a decade. And so there is something about investment done properly at the time of, for new structures and on refurbishment and doing it to a proper level.”* **GLA, Other**

# Areas of overinvestment or waste (key points)



- No clear themes arise on what London Politicians see as areas of waste or 'overinvestment', when asked for more detail on their views on investment. Around two in five cannot think of any examples. Furthermore, no example has more than two mentions.
- In some cases, examples of waste relate to other parts of London's transport infrastructure, such as the Emirates Air Line, rather than the Underground.
- Of the Tube-specific examples given, mentions include concerns around the choice of stations to upgrade, the focus on visual improvements to stations, planned extensions (such as the Northern Line extension).

# Areas of over-investment or waste



*“Well there are odd stations where I’ve always puzzled why they’ve done some works. Regent’s Park Tube station is a classic I think on the Bakerloo Line. It’s an odd station where I don’t think the investment they’ve done there is justified given the level of usage before and after”.* **GLA, Labour**

*“The one thing I wouldn’t do that they’re doing is I wouldn’t be extending the Tube to Battersea, quite frankly, I think it’s a waste of money. It should be all private money and it clearly isn’t. I think TfL are taking a huge risk here and if you were going to extend the Tube that’s not where you’d extend it. Or the only way you’d go ahead is say, actually you’re going to have to pay for it and we’re going to extend it all the way to Clapham Junction, then it becomes of more strategic interest and use.”* **GLA, Other**

*“I think that we have spent a bit too much on heritage tiles and things, and the look of the underground... It’s just the, the finishing touches and everything, it’s sort of a Rolls Royce service, and actually what people really care about is the, being on a train where they can breathe and not be too squashed up, the congestion, and basically getting to where they need to be.”* **Cllr, Labour**

*“The PPP contract was a disaster...in the end, didn’t work particularly well and I think that caused delays and lack of investment. That it wasn’t the right model and it could have been done better and more efficiently in other ways but that’s history now. But I think that caused a knock on effect of lack of investment.”* **Cllr, Labour**

# Have investments been good value for money value for money (key points)



72

- Most feel that the investment programme has provided value for money.
- There is a low level of awareness of the finer detail on whether investments have provided good value for money. Nonetheless, some feel that the money is being better spent now than it was in the days of the Public-private partnership
- However, the knock on effects of the PPP contracts are mentioned as an area of waste, and may have some lingering influence on perceptions of value for money, though this may be due to a perceived lack of information on current spending.



# Have investments been good value for money?



73

*"I think it's better value for money than it used to be. I've very pleased that the PPP is over and so hopefully we can directly see exactly where the money's going."* **GLA, Conservative**

*"I don't have any information to let me know one way or the other, quite honestly. I haven't had any updates personally, so I haven't had any, I haven't picked it up from the press. You hope the money's been well spent and I understand the difficulties."* **Cllr, Labour**

*"Well from what I've seen and I go back to what I've seen of the modern station I think it's been spent fairly well. Whether the, the contracts which have been negotiated in order to do that are sort of good contracts, I don't know because I don't know the detail, but certainly what I've seen I think the money's been well spent."* **Cllr, Conservative**

# Have investments not been good value for money (key points)



- Those who do not see the investments as good value have concerns about how efficiently money has been spent.
- Some concerns around issues with the earlier PPP arrangements, but other concerns may be due to the nature of communications with London Politicians on this matter.
- Many did not elaborate on their views in this area, or made an assumption that there is likely to be 'waste'. This suggests there is a need for increased communications with London Politicians about the value for money investments represent, particularly in light of the work of the IIPAG.

# When investment is not seen as good value for money



*“I would be guessing if I said it had been wasted. I would query whether it’s been directed in the right areas, for reasons I’ve bored you with previously, but as to whether it’s wasted, that would be, that would be somewhat vindictive of me to say that because I, I haven’t seen the business cases and the models to say that was true, so I’d have to say I don’t know.” Cllr, Labour*

*“I always feel that there are economies that can be made which wouldn’t affect what happens and this money could be better spent on actually improving the service for passengers. So I’m sure that, look I have no idea of the accounts, I haven’t seen any figures OK, but I, in any organisation there can be, there will be wastage, and I’m sure there is.” Cllr, Conservative*

*“The general sense of lack of financial acumen around the whole way that the Metro Line collapsed and the delays that that led to, and just the general feeling that that whole sort of private deal was really disappointing, disappointing for the public, and had we done it in a different way we may have got a better outcome.” Cllr, Labour*

# Where is investment seen to be currently being spent?



## Infrastructure

*“One of the things that London Underground, which they do now I think more than they used to, explain we are now upgrading this line, we’re upgrading the Tube, we’re improving the signalling and tell people exactly what they’re doing which I think is helpful. I don’t think people do necessarily see what’s going on, they only see the result of it, for example, on the Jubilee Line as one train pulls out, the next one pulls in.”* **GLA, Conservative**

## Station upgrades

*“I think they’ve probably seen smarter stations and that’s one of those incremental things that sometimes it’s difficult to quantify but I think the stations have improved and a frequency of service, on some lines not on all.”* **GLA, Other**

## New rolling stock

*“I mean it’s quite hard because I know where all the stuff is going in, it’s on the signalling and stuff. I mean, yes, you’ve got new trains on certain lines, so Victoria Line you’ve got new trains. New sub-surface lines you’ve got new trains, so that’s obviously very visible to passengers but I know an awful lot of spend isn’t visible and some of that is stations.”* **GLA, Other**

## Improved services - speed and frequency

*“I think reliability has improved, frequency and reliability has improved on definitely the Jubilee Line, longer trains, faster throughput. Definitely the Circle Line, I think the change there was good. Definitely the Northern Line, although it’s not all finished yet.”* **GLA, Labour**

# Benefits from the investment programme and priorities for future spending (key points)



77

- Improved stations, new rolling stock and increased reliability are the main benefits London Politicians think Londoners have seen.
- Ongoing, London Politicians see continued improvements to infrastructure, service reliability, safety, accessibility and further upgrades as investment priorities for London Underground.
- Driverless trains, Crossrail and line upgrades are seen as the main future benefits for Londoners.

The main benefits London Politicians believe Londoners have seen are a result of the upgrades programme:

Stations

*"I think the cleanliness and tidiness of the stations are being maintained fairly well but I think basically the newer looking stations, they look modern and are now quite acceptable."*

**Cllr, Conservative**

Reliability

*"More reliable trains, better signalling which has meant being able to increase the frequency on some of the routes. Definitely upgrades to the service in order to improve reliability."*

**GLA, Conservative**

New rolling stock

*"Frequency and reliability has improved on definitely the Jubilee Line, longer trains, faster throughout. Some of the stations have improved...I think there is a sense of feeling that things are getting better, that some of the trains are new."*

**GLA, Labour**

## Infrastructure/reliability

*"I think the **reliability and frequency** of trains is very important but I also think that the upkeep of the stations themselves is important and I think money should be spent on, I know it has been done more in central London, but I **think it's very important that the actual stations themselves are given better maintenance** and not left to look quite as shabby as they are because that encourages antisocial behaviour."* **Cllr, Conservative**

## Improving safety/access

*"I'm very distressed about the Northern Line stations south of the river where we have these **tiny little island platform stations, which are not safe, which have little capacity, which are very constrained**, and there seems to be no prospect of rebuilding those stations but they do need to be rebuilt. And I think the **lack of disability access** in much of the station network is becoming more of a problem in a way."* **GLA, Labour**

## Upgrades

*"Well it's what they're doing now really, **it's just upgrading all of the lines**. I mean they're doing Northern at the moment but it's looking at Bakerloo, Piccadilly, Central, upgrading those lines, ordering the new rolling stock and so basically you can send more trains through the tunnels because that's where you're able to increase capacity."* **GLA, Other**

Base: All London Councillors and GLA Members interviewed in 2012 (22); 2011 (20).

# What benefits do you think Londoners will see in the future?



**Driverless trains, Crossrail and new or upgraded tube lines are the top benefits that London Politicians expect to see in the future**

## Driverless trains

*“I think they’re going to have to bite the bullet and negotiate a way with **driverless trains**. I don’t really see the point of having individuals other than safety on the trains. I think you could take the fellow out the front of the train because you don’t really need them these days and you could get them patrolling the carriages which would be a safer experience for us all especially later at night where some people over enjoy themselves shall we say?” Cllr, Labour*

## Crossrail developments

*“**The implication of Crossrail on the rest of the system** and I think that should determine investments in the future and the approach... I can imagine after Crossrail kicks in, the emphasis there will be a more localised service and there have been various issues there about the Piccadilly Line going through Chiswick Park and Turnham Green without stopping and I think London Underground can begin to address those if the main stress from Heathrow is being taken on Crossrail, it becomes a very localised service.” GLA, Labour*

## New/upgraded lines

*“**An extension to the Bakerloo Line** down into southeast London which I think would have a dramatic impact on access for people and there’s also **the option of separating the two Northern Lines**...I don’t know if the limited investment now means that those two things will never happen but if we are going to keep the Underground as a real resource for London then it has to be improved given that our population is rising..” GLA, Other*



# Appendices

- Constituency Members - 6 (2011: 6)

Anthony Arbour (Conservative)\*

Richard Tracey (Conservative)\*

Jennette Arnold (Labour)

John Biggs (Labour)\*

Onkar Sahota (Labour)

Valerie Shawcross (Labour)\*

- London List Members - 4 (2011: 4)

Victoria Borwick (Conservative)\*

Murad Qureshi (Labour)\*

Jenny Jones (Green)

Caroline Pidgeon (LibDem)\*

\* Interviewed last year

- Labour - 5 (2011: 2)

Chris Bond

Colin Ellar

Bassam Mahfouz\*

Phillip O'Dell

Catherine West

- Conservative - 5 (2011:4)

Victoria Brocklebank-Fowler

Colin Smith

Kenneth Smith

Stuart Thom

Phillip Thomas\*

- Others - 2 (2011: 4)

Sophie Fernandes

Penny Shelton

- Borough Location

- Inner London - 4 (2011 - 6)

- Outer London - 6 (2011 - 4)

- Tube station in Ward

- Yes 50% (2011:65%)