

TfL Business Stakeholder
Perception Audit

Job Number 12084

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This report contains the findings of the third wave of research conducted by ComRes among TfL's key business stakeholders.

INTRODUCTION

2009:
Wave 1

- ComRes was first commissioned by TfL in August 2009 to conduct research among its key business stakeholders.
- The objectives of the research were to assess how well the organisation engages with this audience, and to gauge business stakeholders' views on key issues relating to London's transport infrastructure.

2010:
Wave 2

- This research project was repeated in June and July 2010.
- While the objectives of the research remained the same, questions were developed and amended to reflect the new environment faced by TfL, particularly in the context of the Comprehensive Spending Review in the Autumn of 2010.

2012:
Wave 3

- This report contains the findings from the third wave of research among TfL's business stakeholders, conducted by ComRes in October and November 2012.
- This research is designed to track the effectiveness of TfL's engagement with this group since July 2010, and to understand business stakeholders' priorities for investment in transport infrastructure.
- Additionally, this year's research also explores the impact of the Olympic and Paralympic Games on stakeholders' perceptions of TfL, and their expectations for future engagement.

ComRes surveyed 68 of TfL's key business stakeholders through an online survey, supplemented by ten in-depth interviews.

METHODOLOGY

Quantitative research: online survey

<i>Methodology</i>	Quantitative survey of 68 of TfL's key business stakeholders, drawn from TfL's database				
<i>Fieldwork dates</i>	5 th October – 5 th November 2012				
<i>Organisation types</i>	Businesses (n=47)			Business membership organisations (n=21)	
<i>Sectors*</i>	Finance, business or legal services (n=8)	Transport/logistics and manufacturing (n=6)	Leisure services and retail/wholesale (n=15)	Property/real estate and construction (n=8)	Other industries (n=9)
<i>Number of employees*</i>	1-19 employees (n=19)	20-99 employees (n=13)	100-1,000 employees (n=12)	1,000+ employees (n=21)	
<i>Annual turnover*</i>	Less than £1m (n=11)	£1-49m (n=27)	£50-£500m (n=11)	£500m+ (n=13)	

Qualitative research: in-depth telephone interviews

<i>Methodology</i>	Qualitative interviews with 10 of TfL's key business stakeholders, drawn from TfL's database and highlighted as particularly relevant by TfL, conducted by telephone		
<i>Fieldwork dates</i>	18 th October – 16 th November 2012		
<i>Organisation types</i>	Businesses (n=5)	Business membership organisations (n=2)	Business improvement districts (n=3)

Key to symbols used in analysis:

= Notable finding
 ○ = Notable finding, which is positive or encouraging for TfL
 ○ = Notable finding, which is negative or concerning for TfL

*N.B. Small base sizes mean that all comparisons by sector, number of employees and annual turnover are indicative rather than definitive

ComRes abides by the following rules as laid out by the British Polling Council.

GUIDELINES FOR PUBLIC USE OF RESULTS

ComRes is a member of the British Polling Council and abides by its rules (www.britishpollingcouncil.org). This commits us to the highest standards of transparency. The BPC's rules state that all data and research findings made on the basis of surveys conducted by member organisations that enter the public domain must include reference to the following:

- The company conducting the research (ComRes)
- The client commissioning the survey
- Dates of interviewing
- Method of obtaining the interviews (e.g. in-person, post, telephone, internet)
- The universe effectively represented (all adults, voters etc.)
- The percentages upon which conclusions are based
- Size of the sample and geographic coverage.

Published references (such as a press release) should also show a web address where full data tables may be viewed, and they should also show the complete wording of questions upon which any data that has entered the public domain are based.

All press releases or other publications must be checked with ComRes before use. ComRes requires 48 hours to check a press release unless otherwise agreed.

There are five key findings emerging from this year's research:

EXECUTIVE SUMMARY

Importance of transport

Transport infrastructure and investment continues to be viewed as critical to London's economic competitiveness, and a large majority feel that cutting investment would damage business in London. Short-term investment is seen to be as important as funding longer-term projects.

Investment priorities

Improving London's Tube network and building Crossrail remain business stakeholders' top priority for investment. However, investment in expanding London's airport capacity is seen as notably more important this year than in June and July 2010.

Familiarity with TfL

Business stakeholders continue to be more familiar with TfL than other important organisations operating in London. As in 2010, business membership organisations tend to be more familiar with and positive towards TfL than individual businesses.

Perceptions of TfL

Most business stakeholders say that TfL is 'on the way up', and are notably more likely to describe the organisation as being 'forward looking' than in 2010. TfL has also made progress in combatting perceptions that it is 'bureaucratic' and operates in silos.

Future engagement

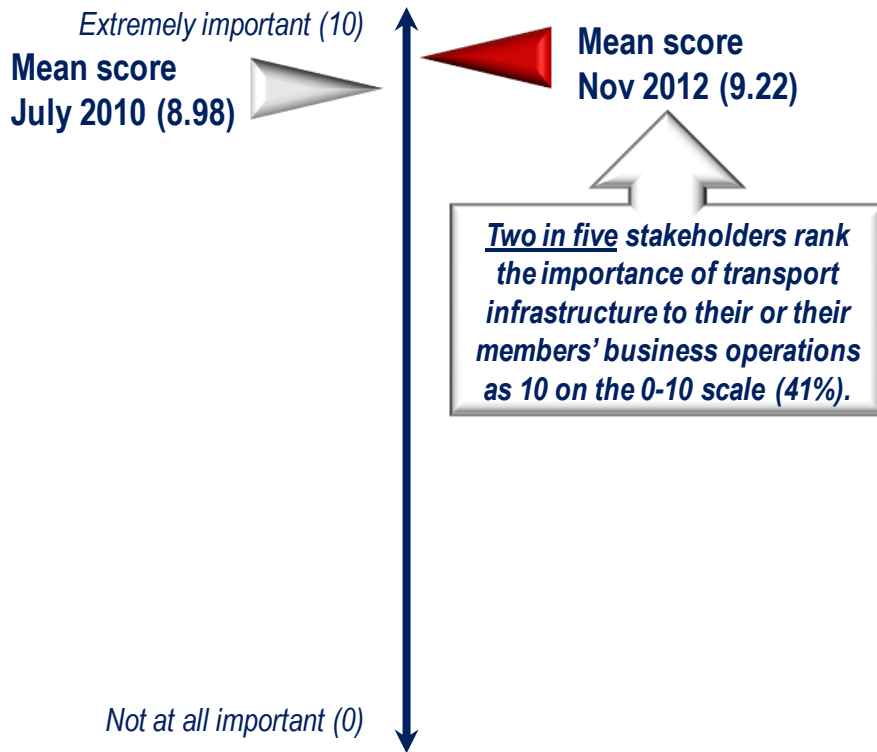
While TfL is praised for its outward communications and particularly the clarity of its objectives, some stakeholders say that they would like to see the organisation listen more closely to the needs and concerns of businesses as part of a two-way engagement process. Stakeholders prefer to access TfL through a central contact, and favour personalised emails from the organisation. Some suggest that TfL should focus on sustaining the 'agility' it demonstrated during the Olympics, and on working more collaboratively with businesses in the future.

Investment in transport infrastructure

Transport infrastructure continues to be viewed as extremely important to the success of business operations in London by an overwhelming majority of business stakeholders.

PERCEIVED IMPORTANCE OF TRANSPORT INFRASTRUCTURE

Perceived importance of transport infrastructure to business operations



- The perceived importance of transport infrastructure to business operations is reinforced in all but one of the business stakeholder interviews.
- Several stakeholders say that businesses *depend* on effective transport links for the movement of staff, clients, customers and goods.

"[In our members' surveys] it's quite interesting and surprising how high up the list of priorities transport infrastructure comes"
Membership body, qualitative interview

"We are absolutely and totally dependent on the surrounding roads"
Business, retail sector, qualitative interview

- Moreover, others say that transport infrastructure is vital in attracting new businesses to the capital, and in encouraging foreign investment.

"It's 100% important. A lot of people choose to work here because of the accessibility"
Business improvement district (BID), qualitative interview

"Transport is the number one issue that creates value"
Business, property sector, qualitative interview

Q: On a scale of 0-10 (where 0 is not at all important but 10 is extremely important), how important or otherwise do you believe that transport infrastructure is to the success of your business operations/the operations of your members' businesses in London?; Base: All business stakeholders 2010 (n=50) and 2012 (n=68)

Sustained investment in transport infrastructure is seen to be very important to London's future economic competitiveness. Stakeholders are emphatic that funding should be focussed on short-term as well as long-term projects.

PERCEIVED IMPORTANCE OF INVESTMENT IN TRANSPORT INFRASTRUCTURE

- Four in five business stakeholders say that sustaining investment in transport infrastructure will be very important to London's future economic competitiveness (79%).
 - Breakdowns for company size and annual turnover indicate that the importance of sustained transport investment to London's future economic competitiveness is particularly strongly felt by stakeholders from smaller compared to larger organisations*.
- Furthermore, an overwhelming majority of TfL's business stakeholders agree with the statement that 'investment in transport projects in London gives me a better impression of the capital as a good place to do business' (97%).

Agreement with statements about investment in London's transport infrastructure

	Agree	Disagree
As well as long-term investment projects, there should be funding for transport projects that can yield tangible results for London in a shorter timeframe (e.g. a few years)	100%	0%
Investment in transport projects in London gives me a better impression of the capital as a good place to do business	97%	0%
Funding for transport projects in London helps support jobs across the UK	76%	3%
Transport investment should be focussed only on long-term large-scale projects to increase London's transport network capacity such as Crossrail	35%	47%

Short-term as well as long-term investment in London's transport infrastructure seen as very important.

- Of all sectors, stakeholders working in finance, business or legal services are most likely to disagree that transport investment should be focussed only on long-term large-scale projects*.

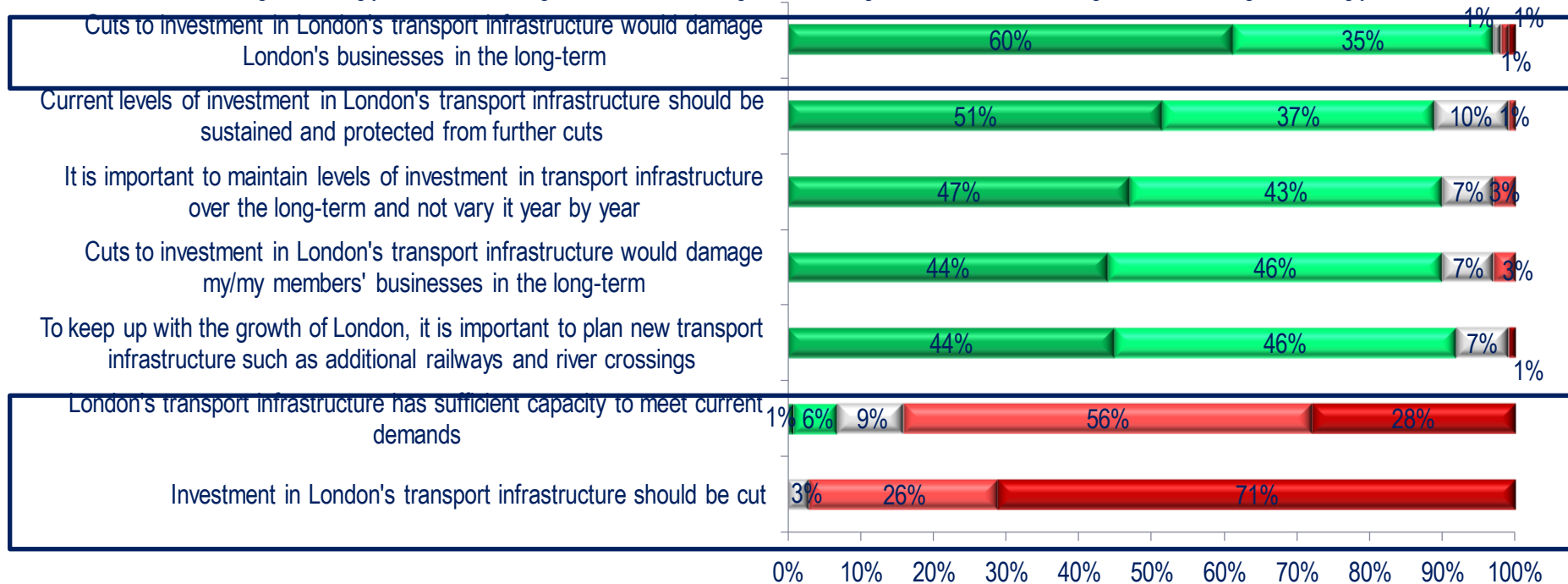
Q: Thinking about London's future economic competitiveness, how important or unimportant do you think that sustaining investment in transport infrastructure will be? Base: All business stakeholders (n=68); Q: Thinking about current economic conditions, to what extent do you agree or disagree with each of the following statements about the level of investment in London's Tube network, buses, trains and roads? Base: All business stakeholders (n=68)
*N.B. Given small base size, these findings are indicative rather than definitive

There is no appetite for cutting investment in transport infrastructure among TfL's business stakeholders. Indeed, overwhelming majorities think that doing so would damage London's businesses, and most disagree that current capacity is sufficient.

IEWS ON FUTURE INVESTMENT IN TRANSPORT INFRASTRUCTURE

Agreement with statements about level of investment

■ Agree strongly
 ■ Tend to agree
 ■ Neither agree nor disagree
 ■ Tend to disagree
 ■ Disagree strongly



- Stakeholders from medium to large organisations are particularly likely to think that cuts in investment in transport infrastructure would damage London's businesses: more than three-quarters of stakeholders from companies with 100-1,000 employees and those with an annual turnover of £50-£500m (compared to 60% overall) agree with this statement*.

Q: Thinking specifically about the future of your company and of your supply chain/your members' businesses, to what extent do you agree or disagree with each of the following statements about the level of investment in London's Tube network, buses, trains and roads? Base: All business stakeholders (n=68) *N.B. Given small base sizes, these findings are indicative rather than definitive

In qualitative interviews, most stakeholders say that short- as well as long-term investment in transport infrastructure is ‘vital’ due to limited capacity and growing demands on the network.

DRIVERS OF SUPPORT FOR INVESTMENT IN TRANSPORT INFRASTRUCTURE

‘London’s transport network does not have enough capacity to meet current and growing demand’

“London transport infrastructure is creaking along” BID, qualitative interview

“Increased demand during the continued growth of the city” Business, verbatim comment, quantitative survey

“Pressure on capacity is growing year on year” BID, qualitative interview

‘Investment does not only benefit London’s businesses, but also the UK economy’

“The important thing about London infrastructure is that it not just for the businesses in London”
Business membership organisation, qualitative interview

“Investment in London is hugely important as it’s the gateway to the UK”
Business, leisure services sector, qualitative interview

‘Previous investment has resulted in tangible improvements’

“It’s important not to let all that has been invested in the past five years go to waste” Business, verbatim comment, survey

“On the Tube and rail there has been a huge amount of investment in recent years...which has made a significant difference”
Business membership organisation, qualitative interview

Most commonly mentioned

While nearly all stakeholders agree that investment in transport is important, a small number say that there is some debate as to how it should be funded.

BARRIERS TO SUPPORT FOR INVESTMENT IN TRANSPORT INFRASTRUCTURE

‘Change can be effected through changes in policy or drives in efficiency, rather than funding’

“Things like road capacity require a policy change rather than funding”
Business membership organisation, qualitative interview

“If you made savings in operating costs [within TfL], you might actually save the money required”
Business, retail sector, qualitative interview

‘Some projects and improvements should be funded by sources other than Government’

E.g. *“increasing the cost of fares”* or *“getting business to dig into its pockets”*
Business membership organisation, qualitative interview

“There are things that the Government needs to focus on in policy terms but doesn’t need to fund”
Business membership organisation, qualitative interview

‘Investment in transport infrastructure has to be balanced with other spending priorities’

“Of course it’s fundamentally important, but you have to weigh up the importance compared to education and healthcare” Business, retail sector, qualitative interview

“Saving lives and teaching young people are more important than pot-holes”
Business, retail sector, qualitative interview

Most commonly mentioned

By some margin, improving London's Tube network and building Crossrail is seen to be the most important priority for investment. Since 2010, expanding London's airport capacity has shifted from fifth to second position in stakeholders' priorities.

PRIORITIES FOR TRANSPORT INVESTMENT – GENERAL PRIORITIES

Importance of investment in general transport priorities

	Mean score	% ranking 1 st – 3 rd
Improving London's Tube network and building Crossrail	1.67	91%
Expanding London's airport capacity	2.75	66%
Improving London's road network capacity	3.08	56%
Giving the Mayor more powers to improve commuter rail services	3.24	50%
A high speed rail link between London and the Midlands	4.24	19%

Half of business stakeholders think that improving London's tube network and building Crossrail is the most important priority for investment (49%).

Most important...

- Reflecting business stakeholders' priorities for investment, two of the most commonly mentioned challenges facing London's transport infrastructure over the next five years focus on Crossrail and airport capacity. Moreover, several stakeholders stress the importance of investment in these areas to London's profile:

"Completing Crossrail on time and within budget will be another major milestone for London...and reinforce that we do consistently deliver major projects to a high standard"

Business, verbatim comment, quantitative survey

"Lack of a decision and clarity on aviation capacity will delay delivery...[and] will impact UK's competitiveness, positioning and attractiveness"

Business, verbatim comment, quantitative survey

Q: Thinking about general transport priorities for London, on a scale of 1-5 (with 1 as the most important and 5 as the least), please rank how important or otherwise you believe each of the following are as a priority for investment.
Base: All business stakeholders (n=68)

Reflecting general priorities for transport investment, business stakeholders overwhelmingly think that upgrading London's rail capacity through Tube upgrades and Crossrail is the most important investment priority within TfL's remit.

PRIORITIES FOR TRANSPORT INVESTMENT – PRIORITIES WITHIN TFL'S REMIT

Importance of investment in priorities within TfL's remit

	Mean score	% ranking 1 st – 3 rd
Upgrading London's rail capacity through the Tube improvement programme and Crossrail	1.89	81%
Investing in London's major road network	3.65	57%
Developing new rail infrastructure projects beyond those currently being built	3.75	41%
Improving London's bus network	3.90	44%
Planning and building new river crossings	4.78	24%
Encouraging more people to cycle	4.79	24%
Making more use of river services	5.13	15%

Sectors most likely to rank this as a top 3 priority:*

- 1) *Transport/logistics and manufacturing (100%)*
- 2) *Leisure services and retail (93%)*

Less expensive, potential 'quick wins' are seen as a much lower priority for investment than improvements to the Tube, rail services and roads.

Most important...

- Other commonly mentioned priorities for investment include specific station improvements and the proposed 'Crossrail 2' line between Chelsea and Hackney, which one stakeholder stresses as critical to London's economy because it will transport people between two important areas of employment.

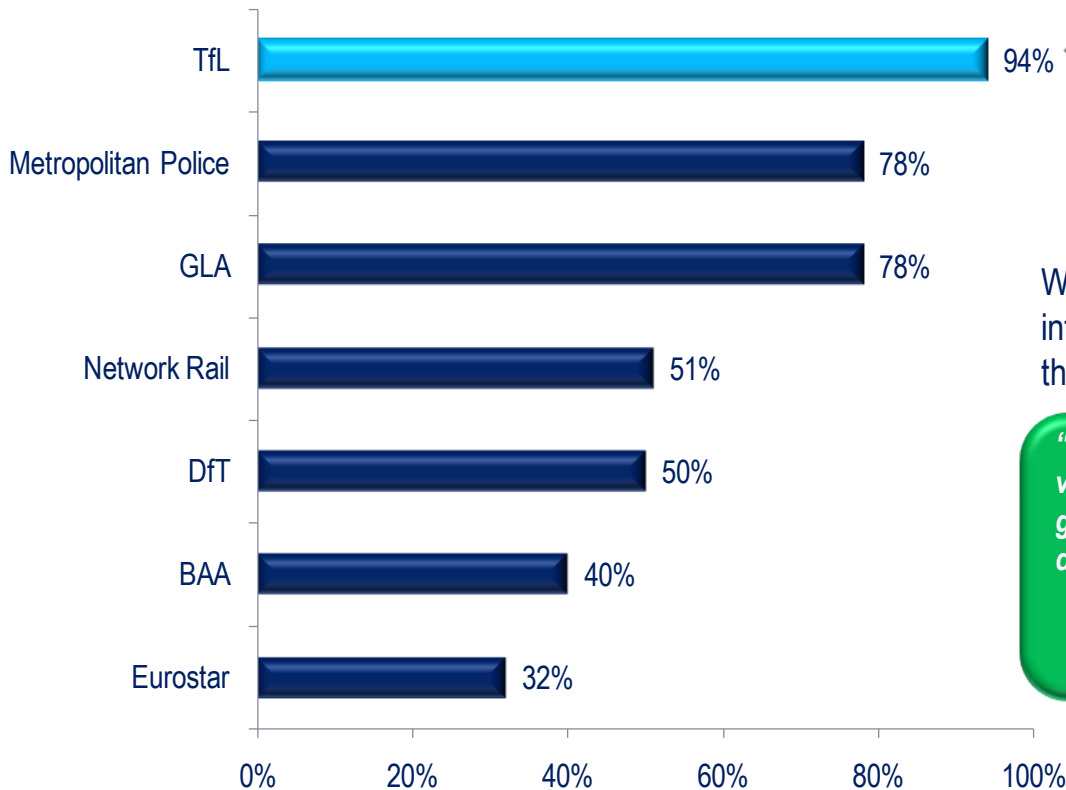
Q: Now thinking about transport priorities that fall within TfL's remit, on a scale of 1-7 (with 1 as the most important and 7 as the least), please rank how important or otherwise do you believe each of the following are as a priority?
Base: All business stakeholders (n=68) *N.B. Small sample size

Impressions of TfL

Business stakeholders in London continue to be more familiar with TfL than other bodies with oversight of transport and other important functions in London and nationally.

FAMILIARITY WITH TFL

Familiarity ('know very well' and 'know a fair amount') with transport organisations and other bodies in London



Business membership organisations tend to be slightly more familiar with TfL than businesses (62% and 45% say that they know TfL very well respectively).

While levels of familiarity with TfL vary across interviewed stakeholders, most say that they know the organisation well:

"I think we know them very well actually, we've got lots of contact with different parts of TfL"
Business, transport/logistics sector, qualitative interview

"I can't say I know TfL particularly well...they are not a particularly accessible organisation"
Business, retail sector, qualitative interview




Q: How well or otherwise do you feel that you know each of the following organisations? Base: All business stakeholders (n=68)

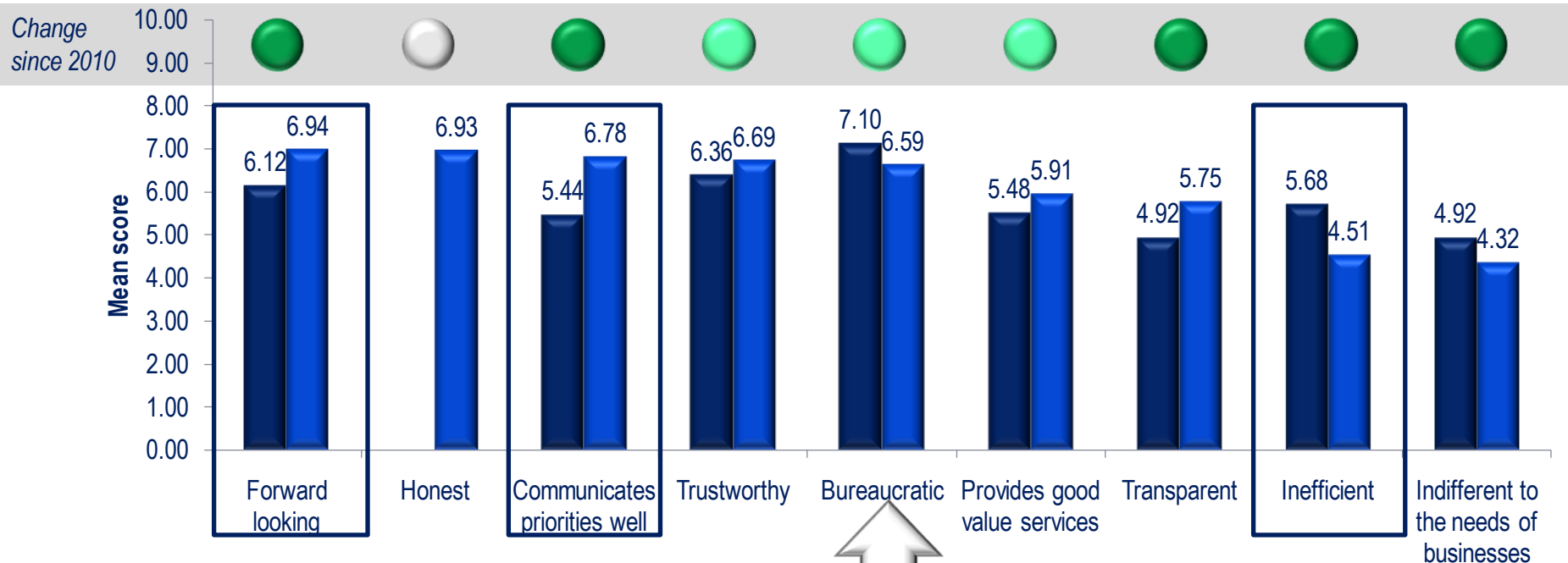
TfL has seen a positive movement in all associations since July 2010. The greatest gains have been made in perceptions that TfL 'communicates priorities well' and is efficient. TfL is now most likely to be viewed as 'forward looking' and 'honest'.

ASSOCIATIONS WITH TfL

Association of words and phrases with TfL

■ July 2010 ■ Oct 2012

-  Highly positive for TfL (more than +/-0.5 change since 2010)
-  Positive for TfL (less than +/-0.5 change since 2010)
-  N/A (not asked in 2010)

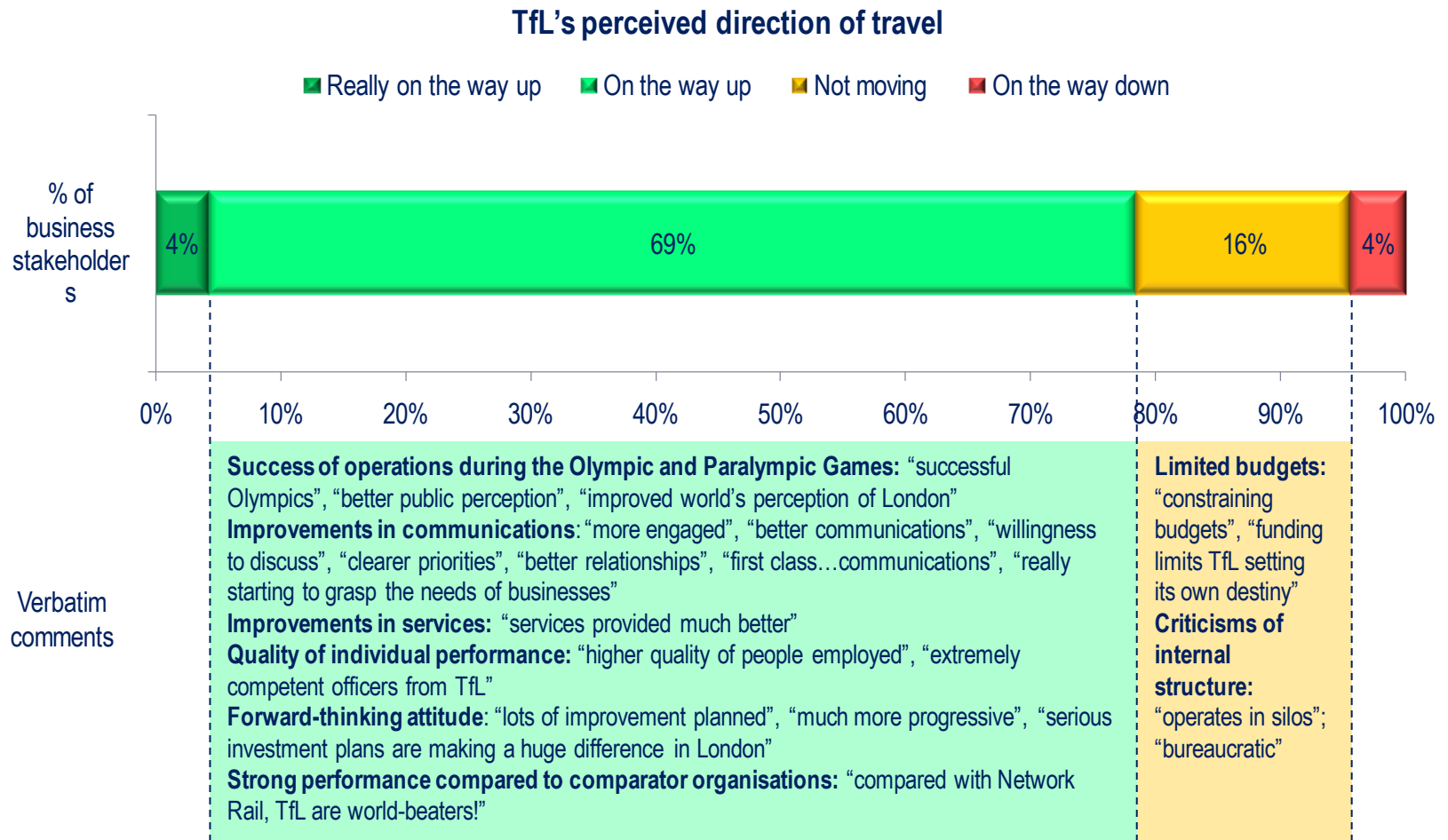


Encouragingly, 'bureaucratic' has fallen from the term most associated in July 2010 with TfL to fifth place in October 2012.

Q: On a scale of 0-10 (where 0 is to no extent and 10 is to the fullest extent) please state to what extent you believe each of the following words or phrases applies to TfL. Base: All business stakeholders 2010 (n=50), 2012 (n=68)

Business stakeholders' attitudes towards TfL's performance tend to be positive, with close to three-quarters describing the organisation as 'on the way up'. The success of the Olympic Games is only one of several drivers of this perception.

PERCEPTIONS OF TFL'S PERFORMANCE



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 describe TfL? Base: All business stakeholders (n=68)

TfL seems to have improved perceptions among its stakeholders over the past few years, with a number of qualitative respondents spontaneously mentioning positive change in TfL's delivery and communications.

DRIVERS OF POSITIVE IMPRESSIONS OF TFL AS AN ORGANISATION

Greater efficiency and efficacy in its services and communications in recent years

- Reflecting the finding that TfL is 'on the way up', several stakeholders remark that TfL seems to be a more efficient organisation in its interactions with them than it did ten years previously.
- ***"They are an excellent organisation, amazingly different from what they were ten years ago"*** (Business, property sector, qualitative interview).
- ***"The impression I have is that it has changed considerably over the past ten years and is really quite a sophisticated organisation in terms of how it thinks and operates"*** (Business membership organisation, qualitative interview).
- ***"In the past we have experienced a real resistance to change, whereas in the last two years there has been more of a willingness to discuss things"*** (Business, verbatim comment, quantitative survey).

Clarity and openness in its objectives and long-term strategy

- TfL's notable improvements in its associations with being an organisation that 'communicates its priorities well' are echoed by comments about TfL's transparency and willingness to engage.
- ***"They tend to be very clear about the things they have control over"*** (Business membership organisation, qualitative interview).
- ***"They seem to be quite transparent on who should be spoken to with reference to what project"*** (BID, qualitative interview).
- The importance of open communication about TfL's long-term strategy is highlighted by the small number of stakeholders who say that it is disappointing that they do not know much about their ***"strategy or long-term policies"*** (Business, leisure services sector, qualitative interview).

Securing Crossrail is seen to be TfL's most important achievement over the past few years, reflecting stakeholders' priorities for investment. Several say that they would like to see TfL continue to make progress in changing delivery restrictions.

TFL'S ACHIEVEMENTS

Securing funding for Crossrail

"TfL convinced all organisations like mine to speak with one voice at about the time of the last election, to secure funding for Crossrail" (Business membership organisation, qualitative interview)

"Crossrail will make a massive difference" (Business, property sector, qualitative interview)

Changes in rules surrounding night-time deliveries during the Olympics

"TfL can help us as an industry to be more efficient, removing the barriers affecting our efficiency, like night-term curfews" (Business, transport/logistics sector, qualitative interview)

"One of the things we worked on together was night-time deliveries" (Business membership organisation, qualitative interview)

Delivery during the Olympics

"They did a great job during the Olympics in terms of operational efficiency, signage, and quality of staff" (Business, leisure services sector, qualitative interview)

Tangible improvements on the Jubilee Line service

"The disruption was probably worth it in the end" (Business membership organisation, qualitative interview)

Engagement on Tube station improvements

"We are working with TfL on improving the XXXX [local] station" (BID, qualitative interview)

Efforts in reducing congestion

"Congestion charge was an amazing success...it let to a 20% reduction in traffic" (Business, property sector, qualitative interview)

Most commonly mentioned...

Congestion and limited capacity is the most commonly mentioned issue facing TfL in the next few years – many say that while the system is just about coping, likely extra demand will cause it to struggle.

CRITICISMS OF AND CHALLENGES FACING TFL

Immediate challenges

Improvements in Tube and rail are not currently reflected in buses

“What they are less good at is engaging about buses. The bus network is one we’ve had for many years, and there are many issues” (Business membership organisation, qualitative interview)

Other stakeholders mention the contribution of buses to inner city congestion, and the lack of connectedness between buses and other modes of transport

Some ambiguity in TfL’s remit

Most stakeholders praise TfL for demonstrating increasing clarity in its objectives, and say that they understand which services and issues are within and outside TfL’s control

However, some stakeholders say that they are less aware of TfL’s powers over policy surrounding airport capacity, and the interactions between TfL and local councils on issues such as parking fines

“Is it TfL’s job to be doing the planning for the Mayor about new airports?” (Business membership organisation, qualitative interview)

Congestion and stretched capacity

“The capacity is so bad that our main station closes at peak hours...it has a major impact on businesses” (BID, qualitative interview)

“There are huge delays, which is bad from our point of view and a sustainability point of view” (Business, retail sector, qualitative interview)

Some stakeholders stress that the solution to these problems lies in policy changes (e.g. lifting restrictions on night-time deliveries, streamlining daytime bus services) rather than through increased funding

Underutilisation of river travel

While it sits lower on the list of priorities for investment than Crossrail, improving air capacity, Tube and rail improvement, several business stakeholders express concern about perceived slow progress on river travel

“River transport is grossly underutilised” (Business, leisure services sector, qualitative interview)

A small number of stakeholders particularly mention the disparity in river travel services in East compared to West London

Long-term challenges

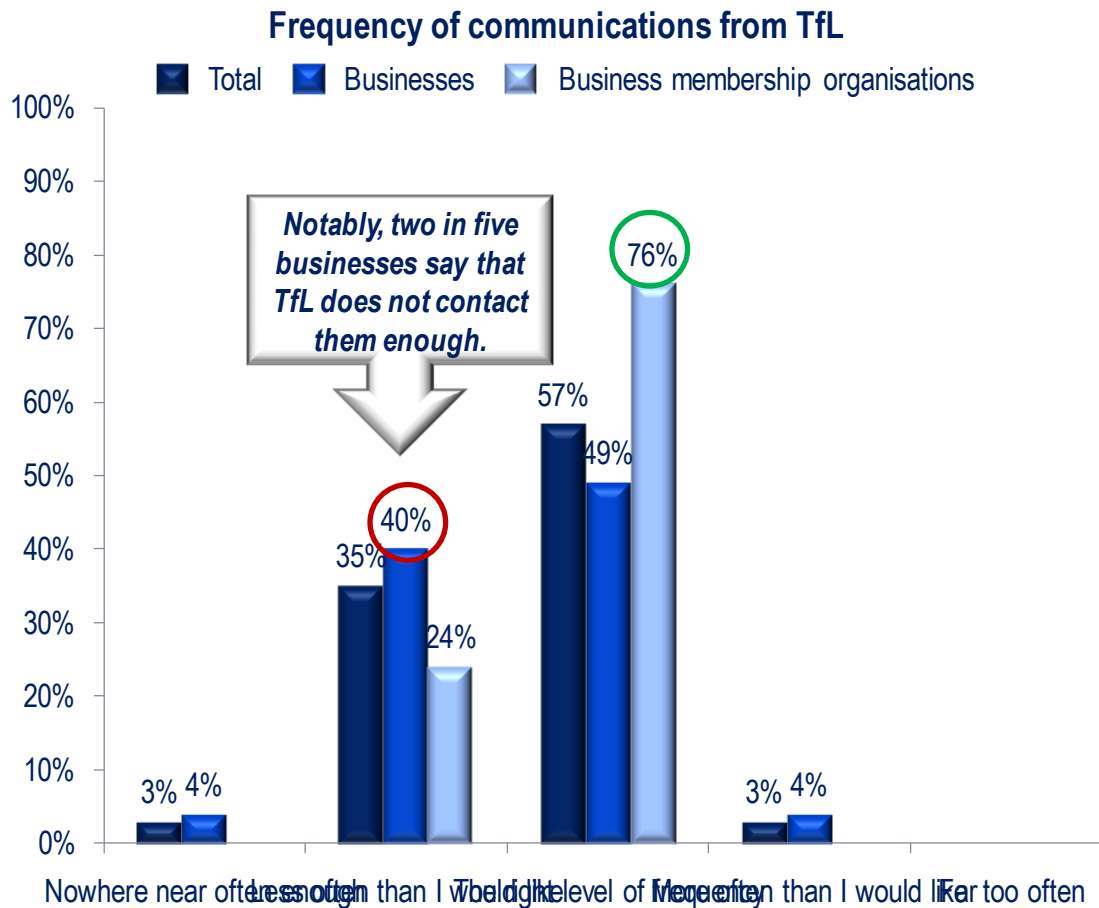
Most important

Least important

Views of TFL's engagement with businesses

Most stakeholders, particularly those from business membership organisations, are satisfied with the frequency of communications they receive from TfL. Encouragingly, among those who are not satisfied, the majority would welcome *greater* contact.

FREQUENCY OF COMMUNICATIONS



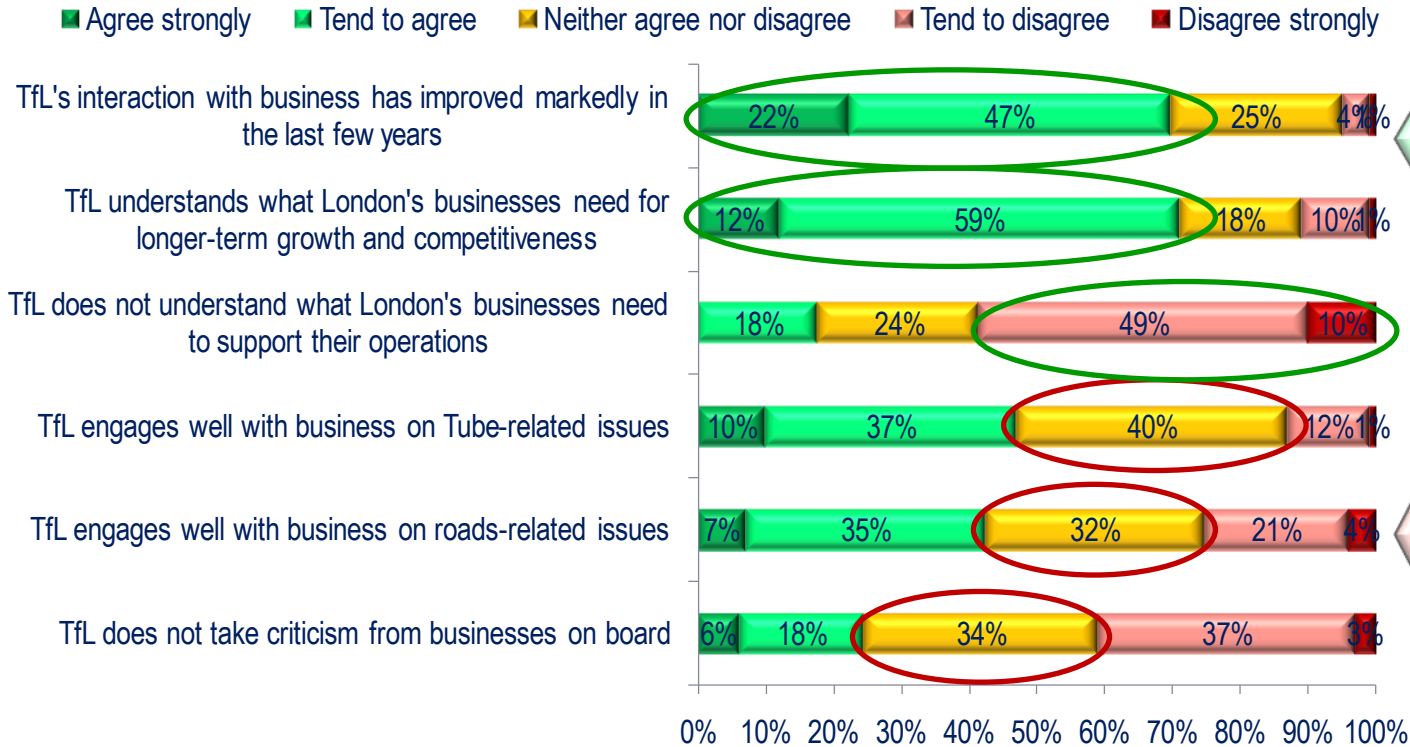
- In qualitative interviews, business stakeholders stress the importance of regular contact from TfL: *“it’s really important that we know what Transport for London are trying to do”* (BID, qualitative interview).
- One stakeholder highlights TfL’s engagement with the business community during the Olympics Games as having been very important in widening the organisations’ reach among this audience: *“the Olympics were really helpful for them because it allowed them to reach out to lots of companies they didn’t have a lot of engagement with directly”* (Business membership organisation, qualitative interview).

Q: Which of the following best describes the frequency of communications you currently receive from TfL? Base: All business stakeholders (n=68); businesses only (n=47); business membership organisations only (n=21)

TfL's interaction with businesses is viewed broadly positively, and as having improved in the last few years. Business membership organisations are particularly favourable about TfL's engagement compared to individual businesses.

GENERAL VIEWS ABOUT TFL'S INTERACTION WITH BUSINESSES

Agreement with statements about TfL's interaction with businesses



High levels of agreement with these statements, and disagreement that TfL does not understand the needs of London's businesses, suggests that TfL's engagement with businesses continues to be broadly positive.

Notable neutral sentiment for these statements suggests an opportunity for TfL to focus on improving its engagement on Tube and road-related issues specifically, and in demonstrating its ability to take criticisms from businesses on board.

- Business membership organisations tend to be more positive about TfL's interaction with businesses than individual businesses: 81% compared to 64% agree that TfL's interaction has improved markedly over the last few years, and 81% compared to 66% agree that TfL understands what London's businesses need for longer-term growth and competitiveness.

Q: Thinking about TfL as an organisation, to what extent do you agree or disagree with each of the following statements? Base: All adults (n=68)

TfL's interactions are seen by most to be open and proactive. However, awareness of TfL's future strategy is variable, and stakeholders in the property and construction sector are less likely than most stakeholders to agree with positive statements.

SPECIFIC VIEWS ABOUT TFL'S INTERACTION WITH BUSINESS

Agreement with statements about TfL's interaction

*N.B. Caution should be taken due to small sample sizes

	Agree	Disagree	Notably positive groups*	Notably negative groups*
I know how to approach TfL for information on issues for my business	79%	10%	Organisations with 100-1000 employees (91% agree); finance/business and legal services (89% agree)	Property/real estate and construction sector (50% agree)
TfL invites me to contribute to consultations on the future of London's transport network where appropriate	66%	15%	Transport/logistics and manufacturing sector (80% agree)	Property/real estate and construction sector (63% disagree)
TfL proactively contacts me about transport issues that will affect my/my members' business	56%	23%	Organisations with 100-1000 employees (82% agree)	Leisure services and retail sector (42% disagree); property/real estate and construction sector (38% disagree)
TfL listens and takes my views as a business/business organisation into account wherever possible	50%	24%	Business membership organisations (70% agree); organisations with a turnover of £1-49m (69% agree)	Property/real estate and construction sector (63% disagree)
I am not well informed about TfL's future strategy	34%	47%	Transport/logistics and manufacturing sector (60% disagree); organisations with a turnover of less than £1m (60% disagree)	Finance/business and legal services sector (56% agree)
TfL takes too long to respond to my enquiries	11%	39%	Organisations with a turnover of less than £1m (60% disagree); business membership organisations (55% disagree)	Property/real estate and construction sector (25% agree)

Notably, half of stakeholders neither agree nor disagree with this statement (50%).

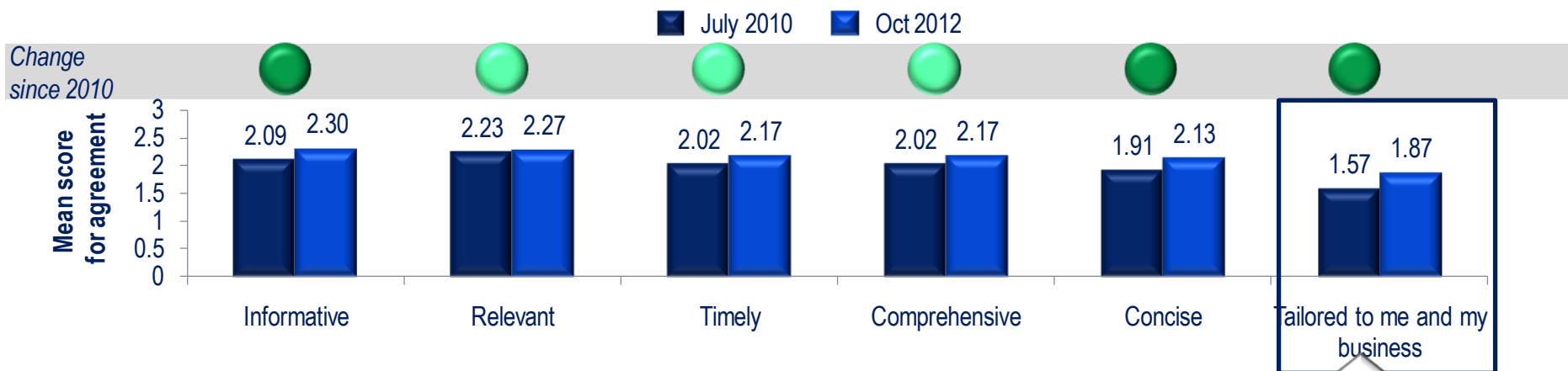
Q: Thinking about how TfL interacts with you and your organisation generally, at times other than during the Olympic and Paralympic Games, to what extent do you agree or disagree with each of the following statements?
 Base: All business stakeholders who have had contact with TfL outside the Olympic Games (n=62); N.B. Given small sample sizes, findings are indicative rather than definitive

Additionally, contact from TfL continues to be viewed as 'informative' and 'relevant' by stakeholders. While communications are more likely to be perceived as 'tailored' this year than in 2010, there is room for further improvement among individual businesses.

ASSOCIATIONS WITH TFL'S COMMUNICATIONS

- TfL has seen modest improvements in the perceived quality of its engagement over the past two years, with greatest movement in perceptions that their communications are 'tailored to me and my business'.
 - Nonetheless, the phrase that TfL's communications are 'tailored to me and my business' continues to be least associated with TfL. This finding is potentially explained by the qualitative interviews, in which some stakeholders say that while TfL performs well in communicating its own priorities and objectives, the organisation can be less effective in establishing two-way communications.

Descriptions of TfL's communications



Highly positive for TfL (more than +0.2 change since 2010)

Positive for TfL (less than +0.2 change since 2010)

Notably, a third of businesses (33%) say that TfL's communications are 'not at all' tailored to them, compared to only 10% of business membership organisations.

Q: Again, thinking about TfL's engagement with you and your organisation generally, at times other than during the Olympic and Paralympic Games, to what extent, if at all, do each of the following words or phrases describe TfL's communications with you in your professional capacity? Base: All business stakeholders 2010 (n=50); All business stakeholders who have had contact with TfL outside the Olympic and Paralympic Games 2012 (n=62)

Business stakeholders value personalised over generalised forms of communications. Membership organisations are more likely to have benefitted from the most effective methods of contact than individual businesses.

EFFECTIVENESS OF FORMS OF COMMUNICATION

- As in 2010, business stakeholders are most likely to say that personalised forms of contact – particularly meetings with TfL personnel – are the most effective methods of interaction they have experienced from TfL.
 - Notably, business membership organisations continue to be more likely to have received the listed forms of contact with the organisation than individual businesses. More than a quarter of businesses have *not* had face to face contact with an individual at director level or above (28%), the most effective form of contact, highlighting a potential area of focus for future improvement.

Effectiveness of different forms of contact from TfL



	Mean score for effectiveness	% of businesses which have <i>not</i> experienced this form of interaction	% of membership organisations which have <i>not</i> experienced this form of interaction
Face to face contact with director level or above	7.98	28%	19%
Meeting with TfL representative	7.49	11%	10%
A meeting with TfL organised by a member organisation	7.02	32%	19%
Meeting a TfL representative at a conference or at a meeting of stakeholders	6.63	28%	10%
Email press release	6.27	13%	10%
Printed documents (such as Annual Report or Business Plan)	4.98	32%	19%

Q: On a scale of 0-10 (where 0 is extremely ineffective and 10 is extremely effective), how effective or otherwise would you rate each of the following methods of interaction with TfL you may have experienced over the past year? Again, please answer according to your experiences of TfL at times other than during the Olympic and Paralympic Games. If you have not experienced these forms of interaction, please indicate below. Base: All business stakeholders (n=68)

In general, stakeholders are more positive than negative about TfL's engagement with businesses, praising them for being responsive and recognising the importance of their business stakeholders.

POSITIVE ASPECTS OF TFL'S COMMUNICATIONS

Increased agility in responding to business stakeholders' concerns and unexpected events, showcased during the Olympic and Paralympic Games

- ***"They are much more reactive and easy to talk to than they used to be"*** (Business, property sector, qualitative interview).
- ***"I got a proactive phonecall from Lauren Preteceille during a major water leak. I wondered if they had taken some 'Olympic pills' that made them far more customer friendly"*** (Business, retail sector, qualitative interview).
- ***"I really appreciated the flexibility of dealing with events and not insisting on just doing things as we have done for the past twenty years"*** (Business, property sector, qualitative interview).

Recognising the importance of the business community, and treating businesses as important stakeholders

- ***"They convinced all the business organisations to speak with one voice two years ago following the election"*** (Business membership organisation, qualitative interview).
- ***"TfL understood that businesses were suffering in the current economic climate, so they actually delayed the implementation of the tightening up of the low emission zone"*** (Business, transport/logistics sector, qualitative interview).
- ***"I think their strengths are their transparency, their desire to communicate with businesses, to actually see that London's strength is the business community"*** (BID, qualitative interview).
- ***"During the Olympics they understood what the challenges were going to be, and what the effect on businesspeople was going to be"*** (Business, retail sector, qualitative interview).

However, some stakeholders identify potential areas for improvement, including further promoting collaborative relationships and discussions with business.

CRITICISMS OF TFL'S COMMUNICATIONS

TfL can appear to be more focussed on communicating its own priorities rather than listening to businesses' priorities

- ***“Talking to TfL is very good if it's something they want to talk to you about”*** (Business, property sector, qualitative interview).
- ***“I think that they have an agenda and frankly, they don't want to be deflected”*** (Business, retails sector, qualitative interview).
- ***“[They need to] create relationships and nurture them as a partnership as opposed to treating them as people who are a pain”*** (Business, retail sector, qualitative interview).
- ***“They need to listen to the views of business, even on issues which perhaps aren't terribly palatable to them”*** (Business, property sector, qualitative interview).

TfL can be less effective at communicating long-term strategy and vision

- ***“They should share better their strategic vision. They should talk to more than just politicians and internal TfL people. We would like to be contacted when they make strategic decisions”*** (Business, leisure services sector, qualitative interview).

Engagement on specific transport issues can be inaccessible

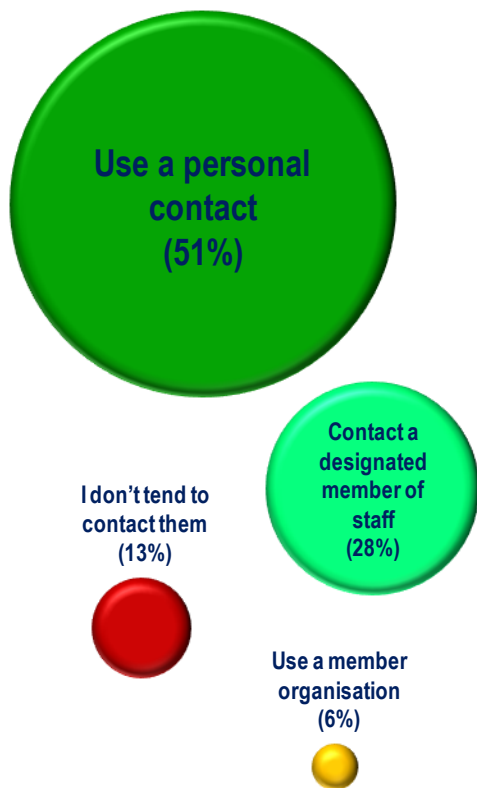
- ***“If things have to be closed, there needs to be more detailed information on why”*** (BID, qualitative interview).
- ***“I had a response [to my issue] that was in-depth but rather technical”*** (BID, qualitative interview).

Desired communications from TfL

Stakeholders not only prefer but expect to be able to contact a specific individual at TfL.

PREFERRED FORM OF CONTACT – REACTIVE CONTACT

Favoured forms of contact on general issues



- In qualitative interviews, stakeholders say that it is imperative that they have a personal contact at TfL who is available to them in the case of a problem of unexpected event.

“It would good to have an account manager who engages with and understands us, and is available at the times that we need them. They should be able to operate across the various strands of TfL, not just roads but also buses and underground...That will be really important this Christmas, because we struggle to get anyone to help us over Christmas. I'd would love to know who is going to look after us at Christmas when we need them.”

Business, retail sector, qualitative interview

- 2010's finding that TfL appears to operate in silos, with limited internal communication between different departments and modes of transport, emerges much less strongly in this year's research. Indeed, several stakeholders say that the organisation appears to be markedly more effective than in previous years.
- However, as verbatim comments attest: ***“TfL appears still to operate in silos relating to modes, with policy conflicts such as pedestrian environment versus traffic not clearly resolved”*** attest, there is further progress to be made in communicating internal structures and interconnectedness.

Q: Generally speaking, how do you prefer to contact TfL in a business capacity, if at all? Base: All stakeholders (n=68)

Despite perceiving face to face meetings to be the most *effective* means of communication, in most circumstances stakeholders would prefer a personalised email. This finding reinforces the importance of tailored, relevant contact.

PREFERRED FORMS OF CONTACT – PROACTIVE CONTACT

Favoured forms of contact on specific issues

	Preferred form of contact	Second preferred form of contact
Invite me to participate in TfL consultation sessions and submit responses	Personalised email (71%)	Email press release (21%)
Invite me to TfL events that may be of interest to me	Personalised email (71%)	Email press release (19%)
Ask for feedback on consultation programmes	Personalised email (60%)	Email press release (22%)
Inform me of unplanned events which may disrupt the transport network and may affect my business	Personalised email (54%)	Email press release (40%)
Inform me of new initiatives designed to help TfL better serve businesses in London	Personalised email (53%)	Email press release (29%)
Respond to issues I have raised with them	Personalised email (49%)	Face to face meeting (35%)
Provide information about TfL's strategy and investment programme	Email press release (40%)	Face to face meeting (26%)

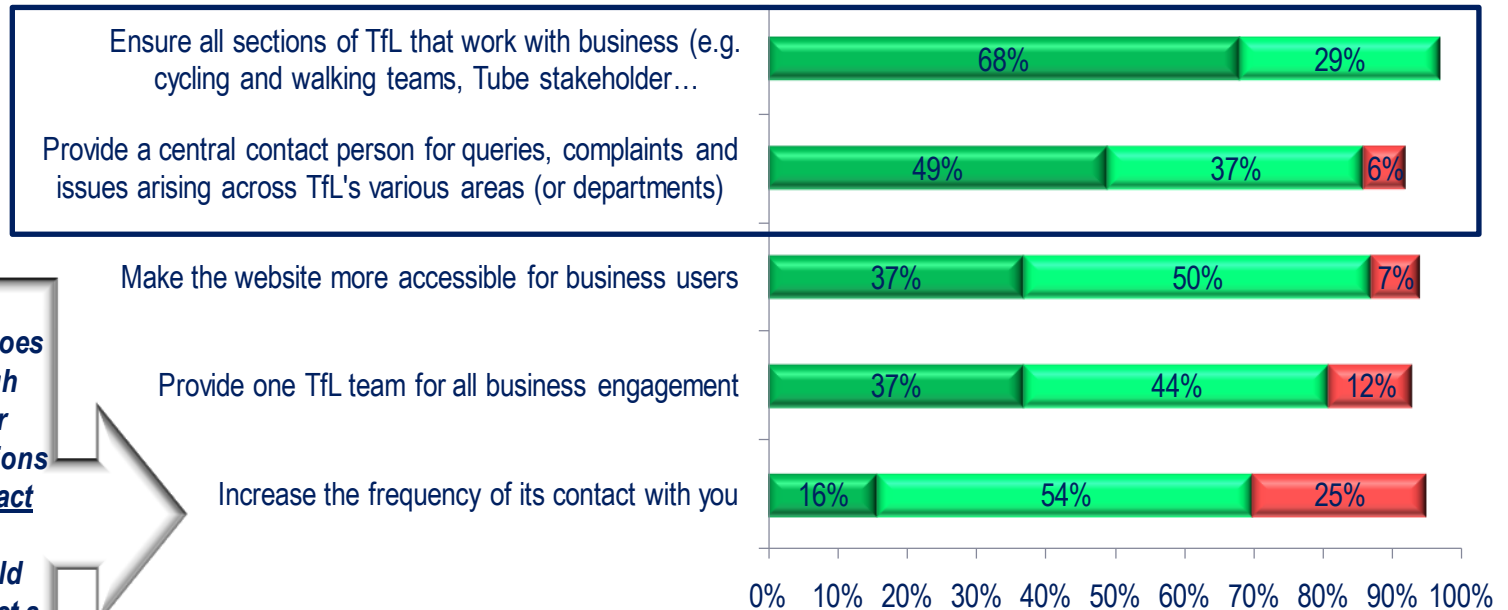
- Therefore, when TfL takes the lead in initiating engagement, business stakeholders prefer contact which is easily digestible and time efficient, while still tailored to them.
- On more specific issues of particular interest to stakeholders, they prefer personal contact and discussion.

Reflecting 2010's finding that TfL risks being perceived as operating in silos, stakeholders would most like to see greater internal coordination from TfL, organised through a central contact point.

AREAS OF IMPROVEMENT IN TFL'S INTERACTIONS – GENERAL AREAS

Helpfulness of potential improvements to TfL's engagement with business stakeholders

■ To a great extent ■ To some extent ■ Not at all



Although a third of businesses say that TfL does not contact them enough when asked about their frequency of communications from TfL, increased contact is a low priority for stakeholders. Most would prefer to be able to contact a single representative at TfL, or to receive tailored contact when necessary.

Q: To what extent do you believe each of the following initiatives would improve TfL's interaction with your business/your members' businesses? Base: All business stakeholders (n=68)

Despite overall positive opinions of TfL's engagement with stakeholders, some identify potential areas for improvement.

AREAS OF IMPROVEMENT IN TFL'S INTERACTIONS – SPECIFIC AREAS

Continuing aspects of its Games engagement

- Almost without exception, business stakeholders praise TfL for its service delivery and engagement during the Games.
- However, some respondents express a fear that this engagement will not be sustained or developed.
- In particular, stakeholders suggest that TfL looks to continue the agility and responsiveness it demonstrated during the Games, by sustaining business email updates and hotspot communications.

Seeking to develop a collaborative relationship

- While most stakeholders are very positive about TfL's engagement, some suggest that TfL is better at communicating its own priorities than engaging on the issues that are most important to businesses.
- One stakeholder suggests that TfL should ***“play a more coordinating role in transport across London”*** (business, transport/logistics sector), ***“bringing together key players”*** (BID, both qualitative interviews).
- Another stresses that it is important that TfL realise ***“they don't need to say yes to everything. No is OK as long as it's justified, not parroted”*** (business, retail sector, qualitative interview).

Communicating TfL's strategy and vision

- Reflecting the finding that transport infrastructure and investment is seen as very important to businesses across London, several stakeholders say that they are very interested to know more about TfL's plans for the future.
- One stakeholder from a business membership organisation recommends that they provide ***“an easily accessible document with the forward investment plans”*** to particularly engaged stakeholders (qualitative interview).

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For more information please contact:

Cordelia Hay

Research Analyst

ComRes

cordelia.hay@comres.co.uk

+44 (0)20 7871 8667