

**Transport Journalists
reputation survey 2011**

09100

September 2011

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Research conducted by Ipsos Mori

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Methodology

- This report presents the findings of the 2011 study of Transport Journalists, part of Ipsos MORI's programme of regular multi-sponsored studies among key audiences
- Methodology details:
 - Fieldwork dates: 27th June- 26th July 2011
 - Number of respondents: 69
 - Overall response rate was 57%
 - Interviews were conducted face-to-face
- Where results do not sum to 100%, this may be due to computer rounding, multiple responses, or the exclusion of "don't know" categories

Transport Journalists – Statistical reliability

Approximate sampling tolerances applicable to percentages at or near these levels (at the 95% confidence level) †

Size of sample or subgroup on which the survey result is based	10% or 90%	30% or 70%	50%
Transport Journalists (69)*	+/- 7	+/- 11	+/- 12
Key Journalists (21)*	+/- 13	+/- 20	+/- 22

* Small sample size, so data needs to be treated with caution.

Differences required for significance at the 95% confidence level at or near these percentages †

Size of sample or subgroup on which the survey result is based	10% or 90%	30% or 70%	50%
Transport Journalists (69) vs Key Journalists (21)*	+/- 15	+/- 23	+/- 25

* Small sample size, so data needs to be treated with caution. Trends should be treated as indicative only

† Based on a random sample

Summary of Key Findings and Implications

Key findings - 1

Reputation Measures

- TfL remains fairly well known among Transport Journalists with seven in ten say they feel they know at least a fair amount about the organisation. LU remains the best known mode, though familiarity with London Overground (LO) and London Buses (LB) has increased this year
- Sentiment towards TfL and individual modes has returned to or, in some cases, exceed 2009 levels this year after a dip in 2010. In particular, the proportion who are 'mainly favourable' towards TfL and London Buses has increased by 13 and 12 percentage points respectively
- Net favourability towards London Buses is higher than ever before
- In line with increased favourable opinion, net advocacy for TfL overall has risen and is now at the highest level on record. The same is true of LU.
- Among TfL's other key comparators¹, Eurostar remains the best regarded, though London Buses is now the second best regarded organisation within this group

TfL's roles and responsibilities

- As before, nearly all journalists see TfL's responsibilities to be the management of the transport system. Within this, key roles include managing the various modes, as well as the overall transport strategy

¹ Key comparators are London Underground, London Buses, London Overground, BA, Crossrail, DLR, DfT, Eurostar and Network Rail

Key findings - 2

TfL's strengths and weaknesses

- In line with findings elsewhere, the most commonly perceived strength of TfL this year is the bus network and the investment in this mode. Other strengths include TfL's impressive management and integration of the transport network
- Given the recent strike threats, it is perhaps unsurprising that the most commonly mentioned weakness is TfL's relationship with the unions. Concern over investment and funding remains a concern among Transport Journalists
- While political interference was a major issue last year, concerns about this have receded since 2010

London's transport policy issues

- Crossrail remains a key transport issue for London, though fewer Transport Journalists (two in five, down from half) mention this as an area of concern compared to last year. The tube is the main concern this year
- Investment and capacity/congestion also remain key issues
- Preparing for the 2012 Olympics is increasingly seen as a key issue, with a quarter of journalists now mentioning this
- These concerns are broadly echoed by key journalists, though this sub-group tend to more concerned than the group overall about industrial relations and cycling

Key findings - 3

TfL's vision

- Transport Journalists are increasingly well informed about TfL's vision for the future of transport, up from around half in 2009 to nearly two-thirds this year
- Encouragingly, the proportion who think the vision is realistic and who trust TfL to deliver on the vision has also increased

Investment

- While many journalists continue to think that the level of investment in London over the past 5 years has been 'about right', they are increasingly likely to feel that investment has been 'too little', up from less than three in ten last year to almost two-fifths this year
- As a result, almost all journalists think it is important that levels of investment in transport in London is at least maintained at current levels

TfL's Business Objectives

- This year, average ratings across many of the statements which fall under TfL's Business Objectives have increased, in some cases substantially
- Confidence in the delivery of Crossrail has improved. After a decline in 2010, journalists' confidence in TfL's ability to deliver Crossrail on time is now higher than in 2009
- Journalists are increasingly confident in Business Objective 2 – to smooth traffic flows. Levels now exceed those seen in 2009

Key findings - 4

TfL's Business Objectives (cont.)

- The cycle hire scheme has been a success. Following its introduction last summer, average ratings for Business Objective 3 (to lead a revolution in cycling and walking in London) have improved
- Perhaps related to the introduction of the cycle hire scheme, journalists are now more likely than in 2010 to agree that TfL is committed to improving air quality and reducing CO₂ emissions in London, part of Business Objective 6 – to minimise transport impacts on the environment
- As we have seen, the 2012 games are seen to be an increasingly important issue for TfL. Encouragingly, journalists are increasingly likely to agree that TfL will successfully deliver transport projects to support the Olympics and provide a lasting legacy

Press relations and sources of information

- Ratings of TfL's press relations are consistent with last year – nearly half of journalists rate TfL's press relations as 'very' or 'fairly good'
- That said, increasingly few – just one in twenty – describe TfL's press relations as poor
- Journalists continue to praise TfL for providing good quality news items and speedy responses. Indeed, across all four press relations metrics, the gains of recent years have been consolidated.
- The proportion of journalists saying that they have recently run favourable stories about TfL has increased to the highest level since 2006, reversing a decline over the past 5 years

Implications - 1

- Transport Journalists' views of TfL are more positive compared to a year ago. Last year, the research was carried out during the Government's public spending review and in particular, there was a lot of uncertainty about funding for major transport projects such as Crossrail, the tube upgrade etc
- With funding for major transport projects around the Capital ring-fenced last autumn, it is perhaps not surprising to see the media's confidence in TfL's ability to deliver on its objectives increase. Indeed it is also not surprising that TfL's reputation (as well as individual modes) have been boosted by the successful delivery of a number of new services (improvements to the buses, new trains on the Victoria and Met lines, Overground and the cycle hire scheme)
- With less than a year to go until London 2012, it is encouraging that three in five journalists are confident that TfL will deliver transport improvements ahead of the Games. Where possible, TfL should continue to reinforce positive messaging around the new developments delivered to date and be mindful that a successful event could help to improve TfL's (and London's) overall standing among domestic and international stakeholders
- While this year's findings represent an overall positive year for TfL among this audience, there are still areas of concern which could see the balance tip the other way in the future. The main concerns include the tube upgrade, Crossrail, overcrowding and the ability to source investment – these remain London's top transport policy issues

Implications - 2

- TfL's relationship with the unions has commonly been cited as an area of weakness, although over the past two years mentions of this have increased with the number of strike threats/actions. While some journalists are sympathetic to the challenge TfL has in this respect, overall sentiment suggests that both sides could do better to improve the relationship as it is usually passengers that suffer
- The improved ratings for TfL's press team seen last year have been maintained and negative opinion has fallen. Ratings on the four key press relations indicators (providing speedy responses, proactively generating good quality news stories, access to top executives and trusting journalists in an open and honest dialogue), have steadily improved since 2008. The TfL press team should continue to build on this success
- In addition, TfL's press team should continue to play the crucial role in building public confidence in TfL's ability to deliver transport for the 2012 Games as well as Transport Journalists' confidence in TfL's ability to deliver on its vision

Key reputation measures – TfL Summary

	Qtr 1 06/07	Qtr 1 07/08	Qtr 1 08/09	Qtr 1 09/10	Qtr 1 10/11	Qtr 1 11/12
Net Favourability	27	39	30	31	17	34
Net Advocacy	22	7	8	9	-1	24
Familiarity	53	77	66	66	71	72

TfL's Business Objectives - 1

	2008	2009	2010	2011
<u>Business Objective 1: to expand transport capacity</u>				
Upgrade the Tube to deliver improved reliability and faster journey times*	n/a	55	53	63
Deliver Crossrail on time i.e. by 2018*	n/a	53	39	56
Deliver improvements to London Overground and DLR networks ahead of 2012 games*	n/a	66	60	70
<u>Business Objective 2: to smooth traffic flows</u>				
Re-phasing traffic lights to make best use of London's limited road space	n/a	58	52	61
Introduce a system for planning road works in order to reduce the disruption they cause	n/a	46	41	53
<u>Business Objective 3: to lead a revolution in cycling and walking in London</u>				
Is supporting the infrastructure for electric vehicles in London	60	58	51	59
New cycle schemes to encourage more people to cycle	n/a	64	62	73
Is encouraging a shift to more sustainable modes of transport in London	61	62	53	63

* In 2009, wording of statement was slightly different; "Will successfully deliver **extensions** to London Overground and DLR networks ahead of 2012 games"

TfL's Business Objectives - 2

	2008	2009	2010	2011
<u>Business Objective 4: to improve further the safety and security of the travelling public</u>				
Maintains a safe transport infrastructure	70	72	66	69
Invests in police and technology to ensure crime is kept to a minimum on the transport network	n/a	61	62	64
Works well with the police and security services to minimise the risk of terrorist attack	69	67	66	71
<u>Business Objective 5: To dramatically improve the experience of travelling in London</u>				
Is improving door to door journey times	54	53	50	54
Is improving the environment on our streets and public spaces	56	54	53	56
Runs a reliable transport system	61	60	58	62
Cares about its customers	59	57	54	62
Operates an inclusive transport system that is welcoming to everyone	61	61	55	61

TfL's Business Objectives - 3

	2008	2009	2010	2011
<u>Business Objective 6: to minimise transport impacts on the environment</u>				
Is committed to improving air quality in London	60	58	51	60
Is committed to reducing CO₂ emissions in London	59	60	54	61
<u>Business Objective 7: to ensure value for money</u>				
Delivers good value for London's taxpayers	n/a	52	51	54
Delivers good value for London's fare payers	n/a	51	49	52
Is a well-managed organisation	55	56	54	60
<u>Business Objective 8: to deliver London's 2012 transport projects and secure a lasting legacy</u>				
Will successfully deliver transport projects to support the Olympics and provide a lasting legacy	n/a	63	59	67

Main Findings: Reputation Measures

Familiarity & favourability
Advocacy

Reputation Measures - 1

Familiarity – How well do journalists feel they know TfL?

- Seven in ten Transport Journalists feel they know TfL very well or a fair amount, consistent with 2010
- London Underground continues to be the best known of all the TfL organisations among journalists (including TfL itself), with more than eight in ten saying they know it very well or a fair amount
- Familiarity with London Overground and London Buses has increased (both up 11 percentage points compared to 2010), though both remain the least well known modes
- Familiarity with BA has fallen since last year (down 11 points)

Favourability – What are journalists' overall opinions of TfL?

- Almost half of Transport Journalists hold a favourable opinion of TfL
- London Buses and DLR are the best regarded modes, with favourability having jumped by 12 percentage points since last year for London Buses
- Net favourability towards London Buses is higher than ever before. For TfL and LU, net favourability has returned to the levels seen in 2009, following a dip in 2010
- These changes in favourability are evident among key journalists as well. For TfL, last year's rise in unfavourable opinion has been reversed. For London Buses, positive views among key journalists appear to be rising in line with the general trend
- Among key comparators, favourability remains broadly consistent with 2010

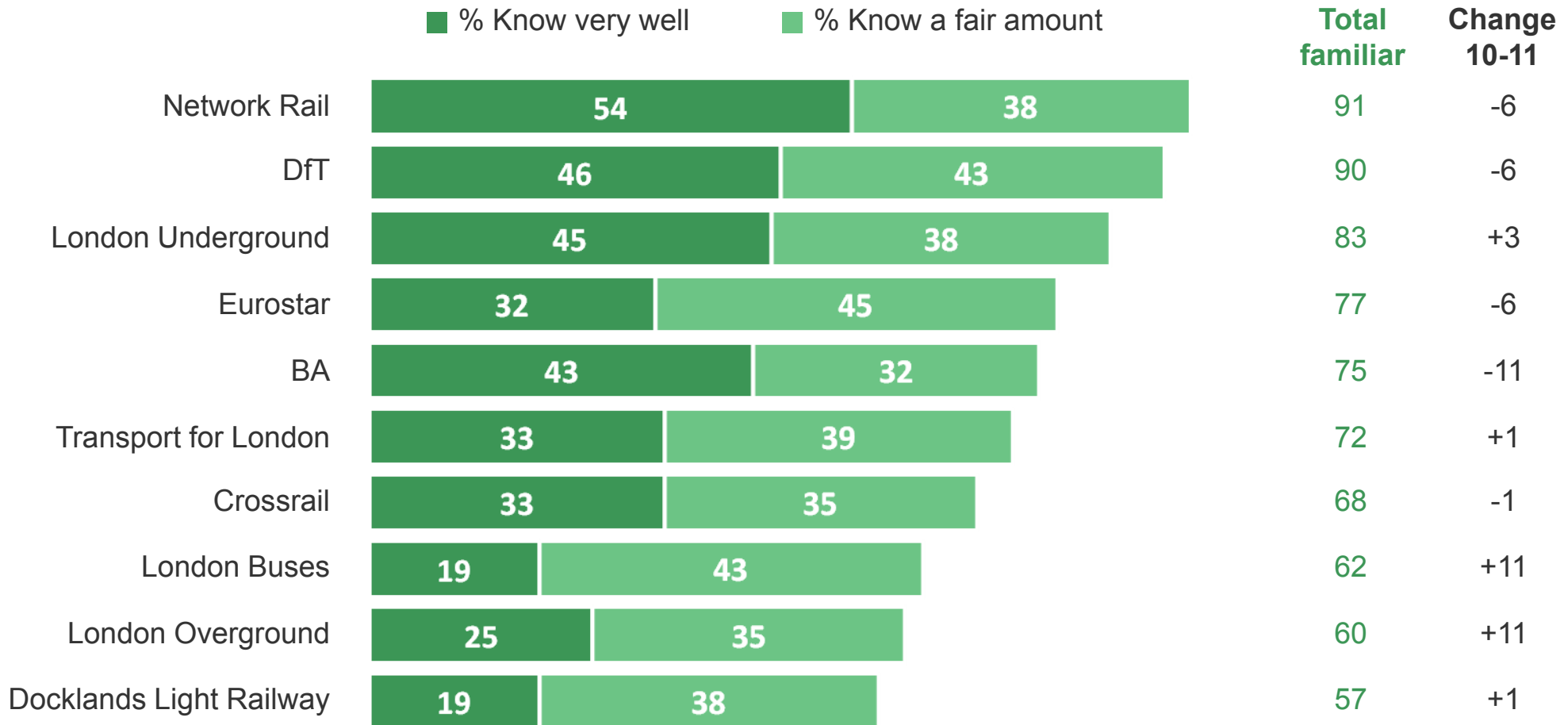
Reputation Measures - 2

Advocacy – Would journalists speak highly or critically of TfL?

- The majority of Transport Journalists (55%) would be neutral if someone asked their opinion of TfL, around a third (34%) would speak highly of TfL, while one in ten would speak critically
- Net advocacy has increased for TfL and is now at the highest level on record. More journalists say they would speak highly of the organisation and fewer would be critical compared to 2010
- LU, LB and LO all attract significantly more advocates than critics, although neutral opinion of these organisations is still the most common position among journalists
- Key journalists are much more likely to be advocates of TfL and the different modes, with scores having increased significantly in the past year
- Among the comparator companies, Eurostar remains the 'gold standard', while London Buses is now the second best regarded organisation within this comparator group. Network Rail and DfT remain the organisations most likely to have negative net advocacy scores – that is, these organisations attract more criticism than praise

Familiarity has increased for London Buses and London Overground but has remained flat for TfL

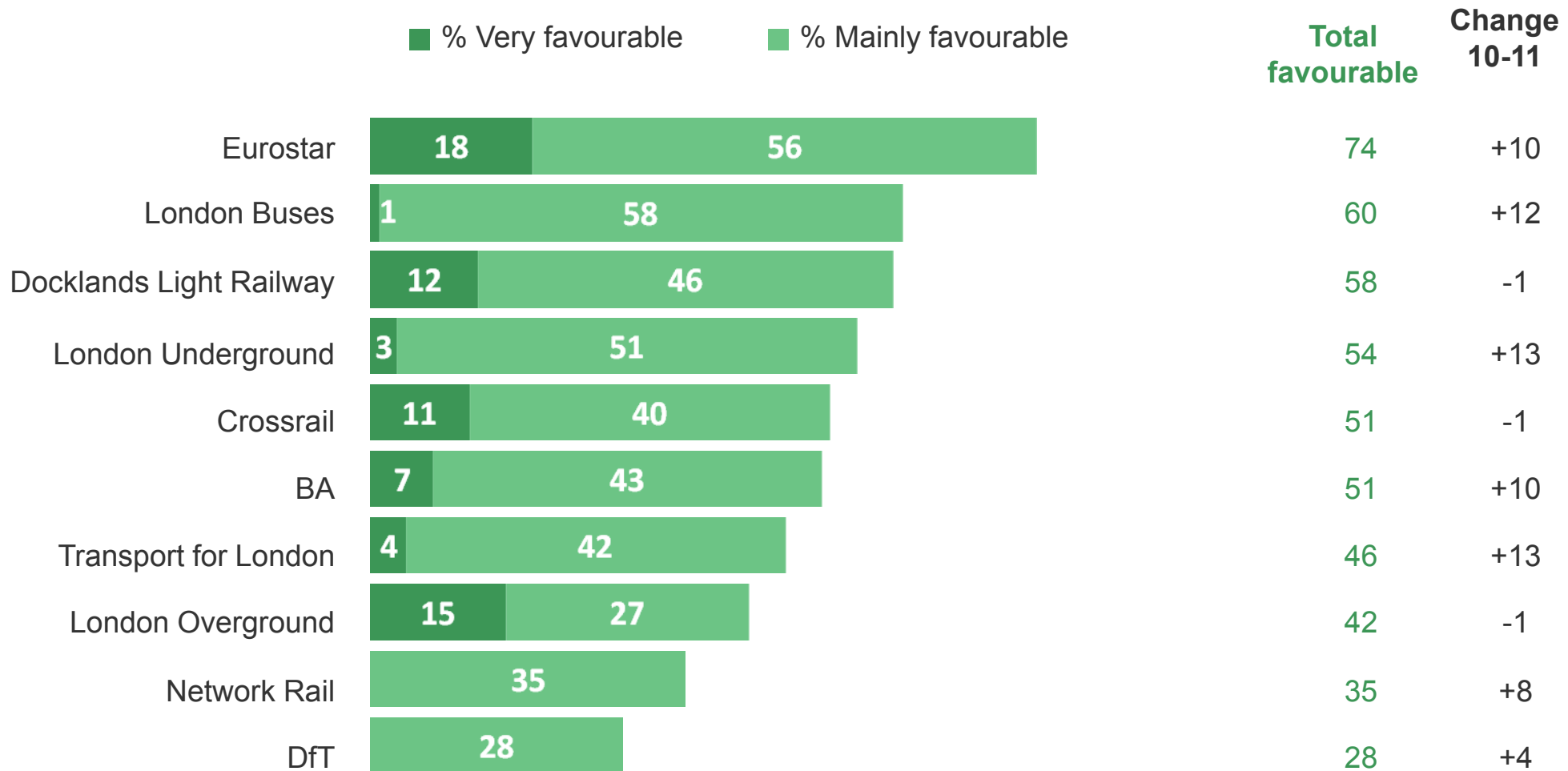
Q How well do you feel you know . . . ?



Base: All Transport Journalists (69), 2011

Favourable opinion towards London Buses, TfL and LU has increased since last year

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

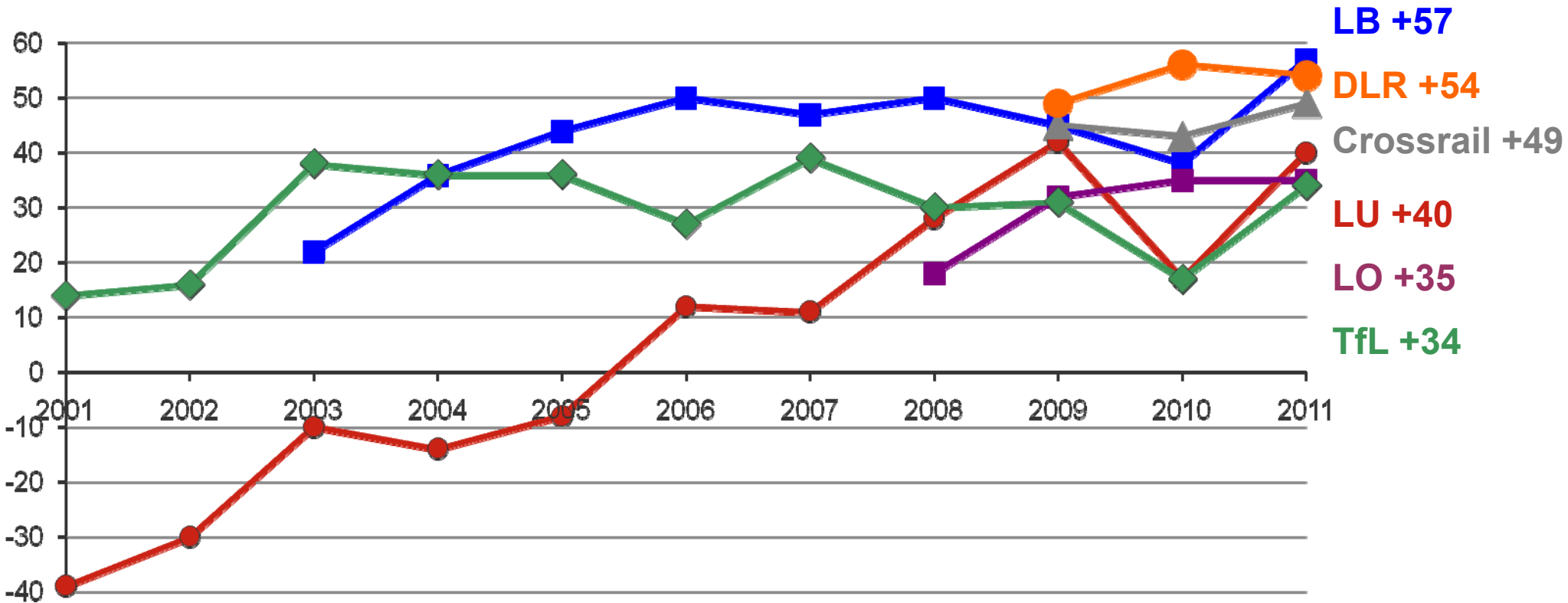


Base: All Transport Journalists who have at least heard of each company, 2011

The increase in net favourability towards LB reverses the declining trend seen since '09. After a significant decline in '10, favourability towards TfL and LU has returned to the levels seen in '09

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

Net favourable (% favourable minus % unfavourable)

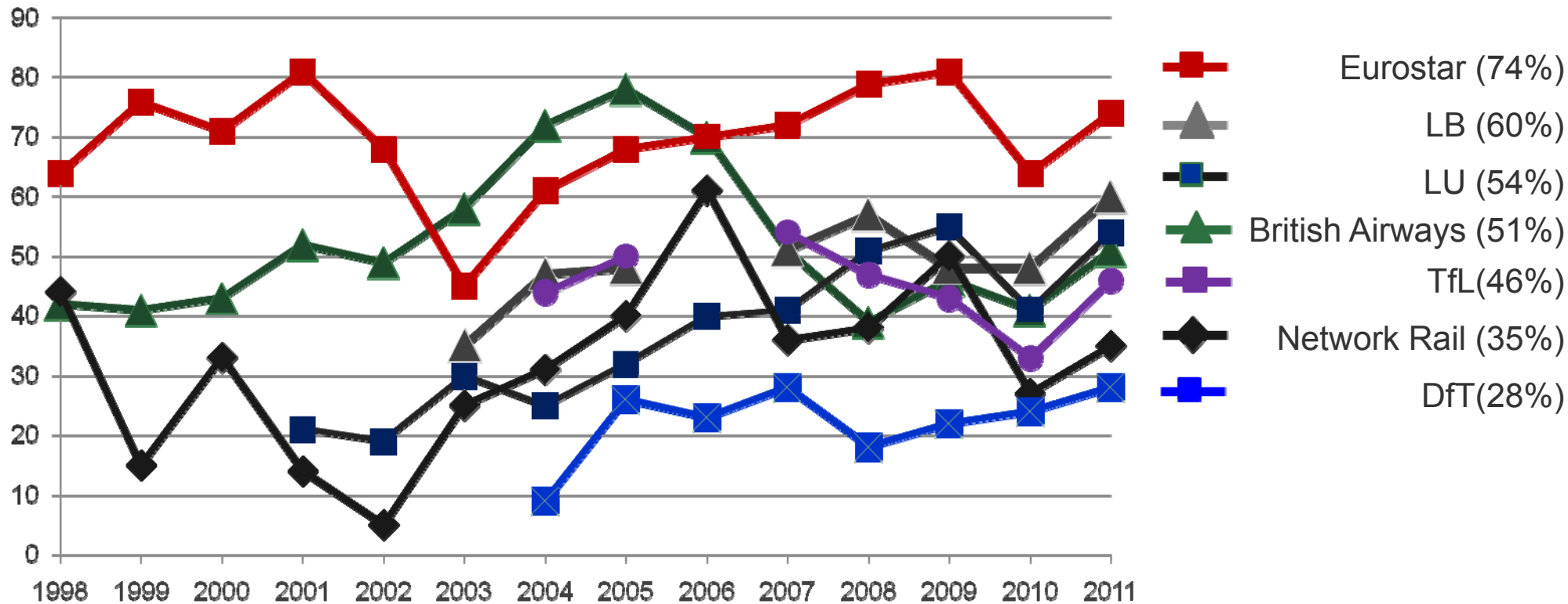


Base: All Transport Journalists who have at least heard of each company 2011

Favourability has increased across the board

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

Favourable (*% very/mainly favourable*)



Base: All Transport Journalists (69), 2011

While the increase in favourability towards LB takes this above previous levels, favourability towards TfL and LU is merely returning to the levels seen in '09

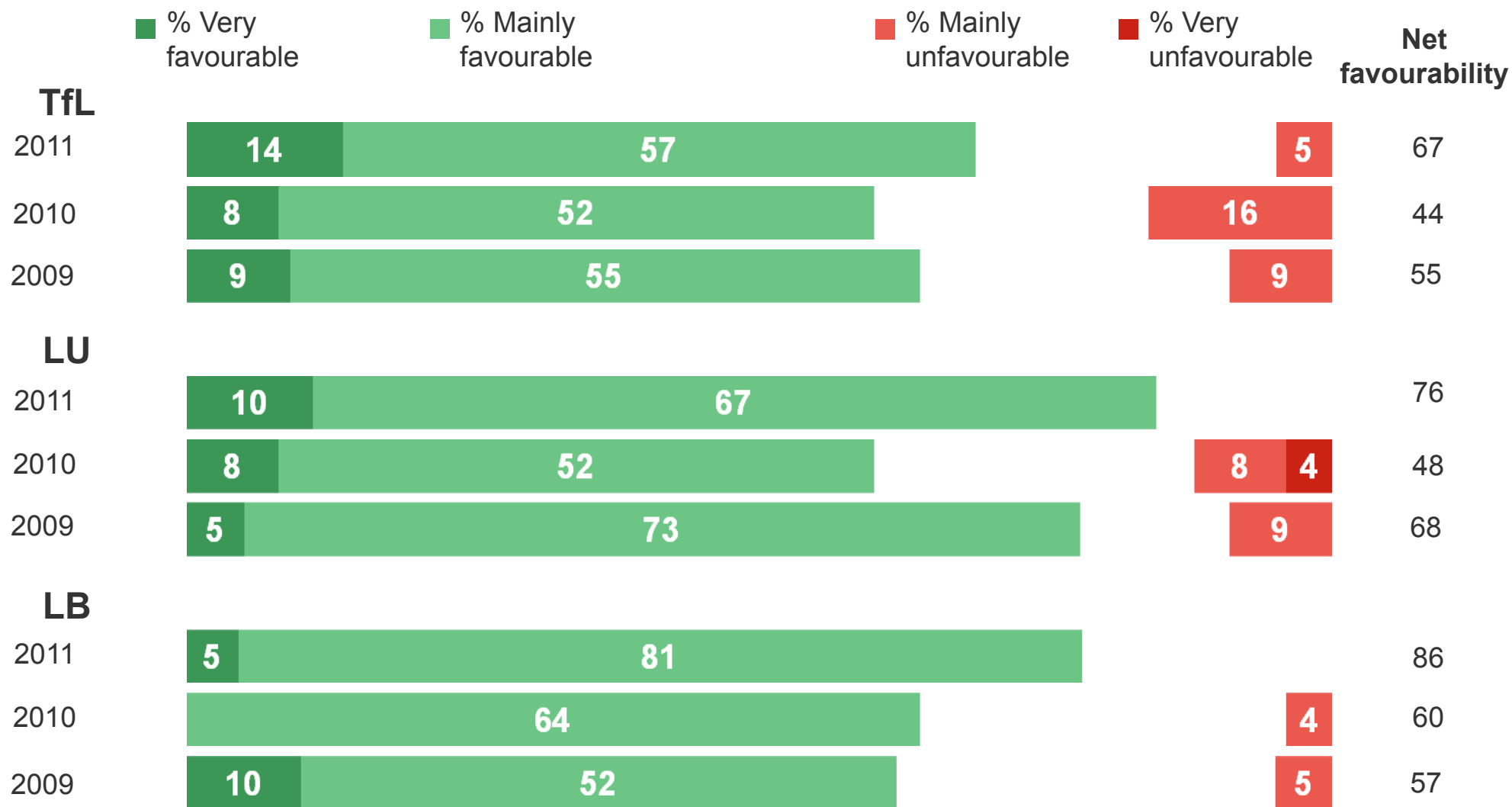
Q How favourable or unfavourable is your opinion or impression of . . . ?



Base: All Transport Journalists who have at least heard of each company, 2011

TfL's key journalists*: Again, favourability towards TfL and LU have returned to the same levels as '09, while opinions towards LB are more favourable than previously

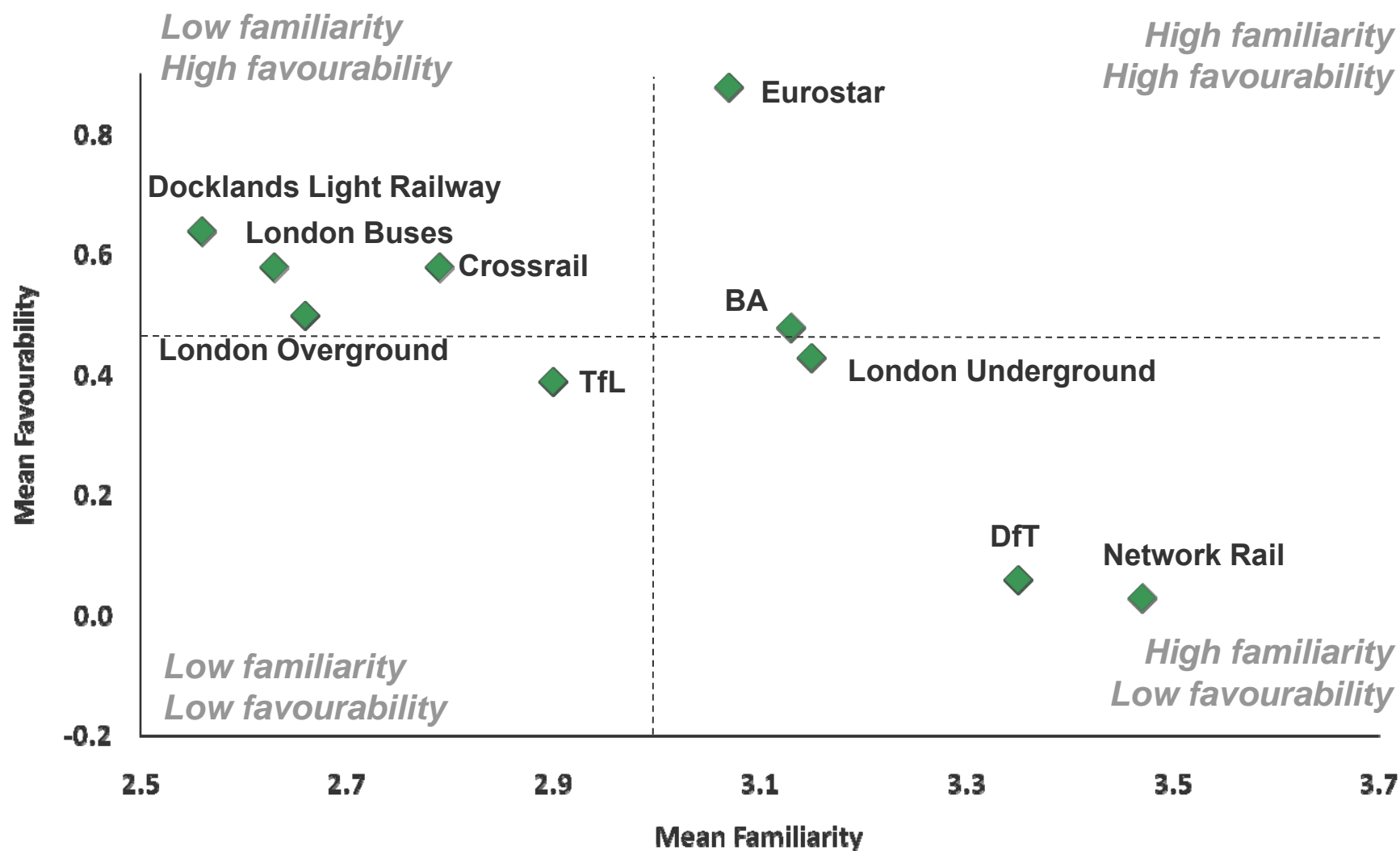
Q How favourable or unfavourable is your opinion or impression of . . . ?



* WARNING: SMALL BASE SIZE

Base: All key Transport Journalists who have at least heard of each company, 2011

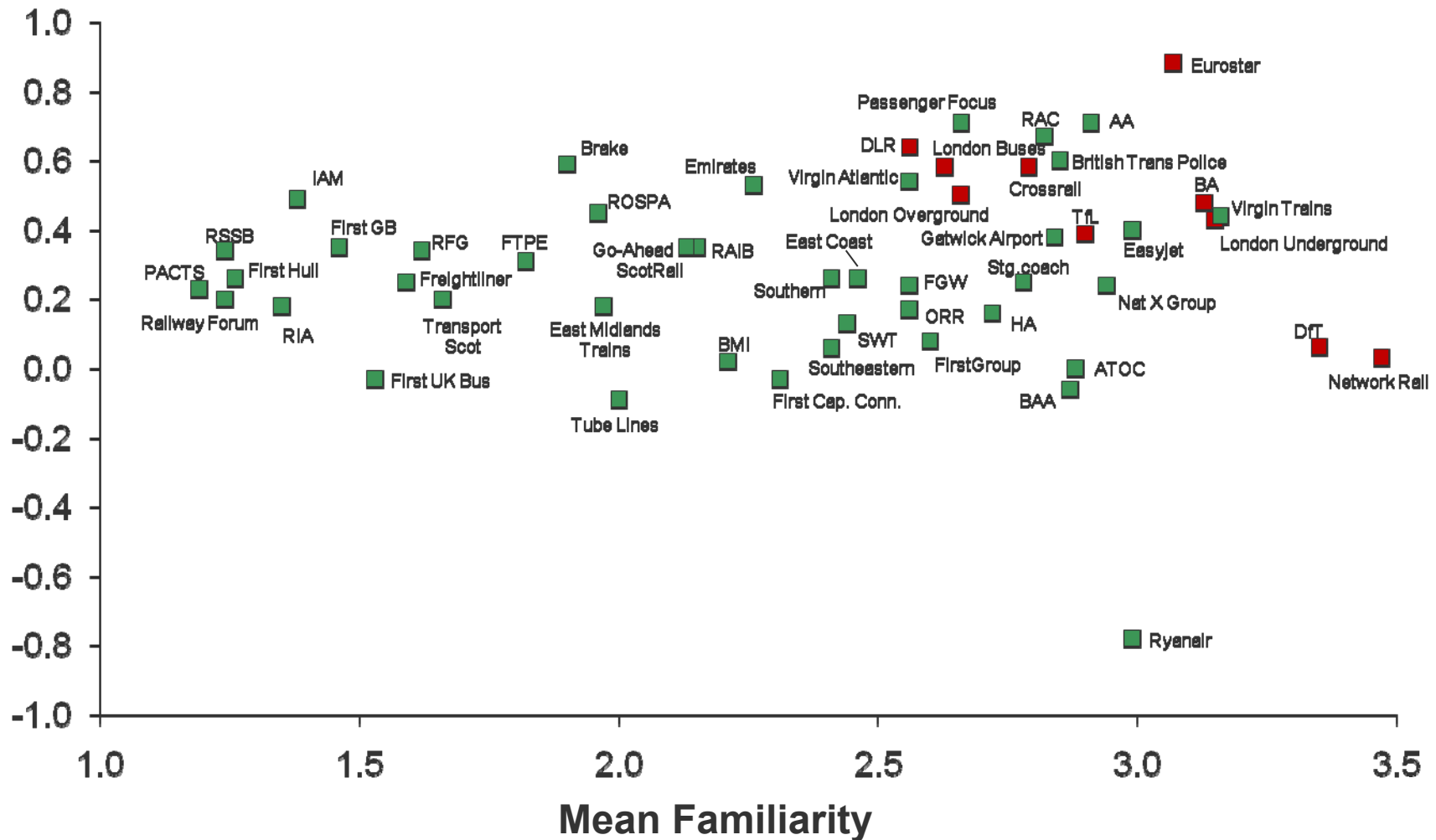
TfL's relative position within the sector



Base: All Transport Journalists (69), 2011

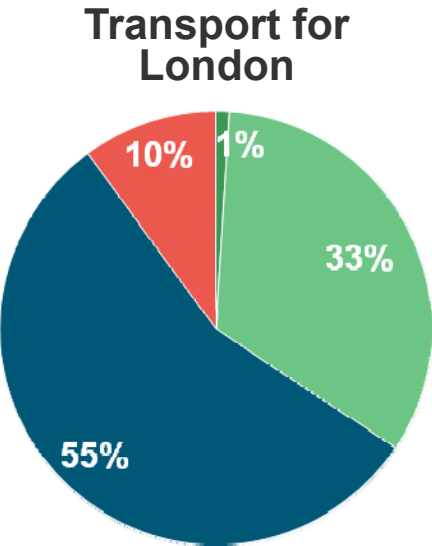
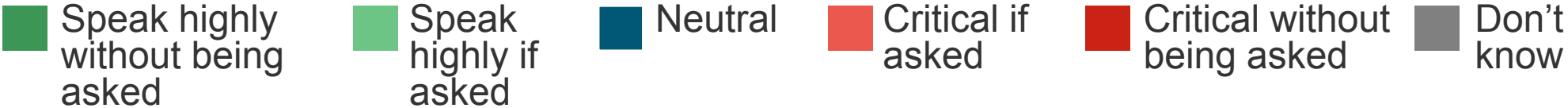
TfL's broader positioning

Mean Favourability

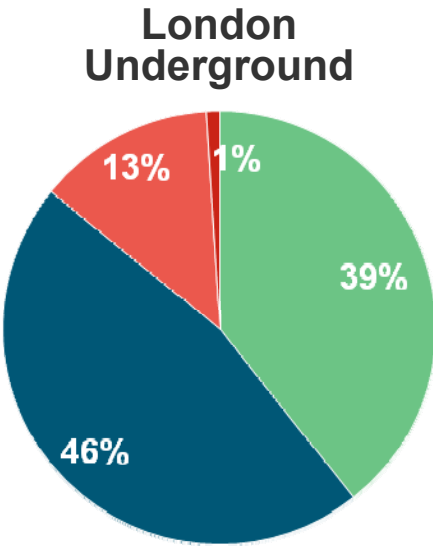


Advocacy has increased significantly for TfL, LU and LB, although around half remain neutral towards each mode

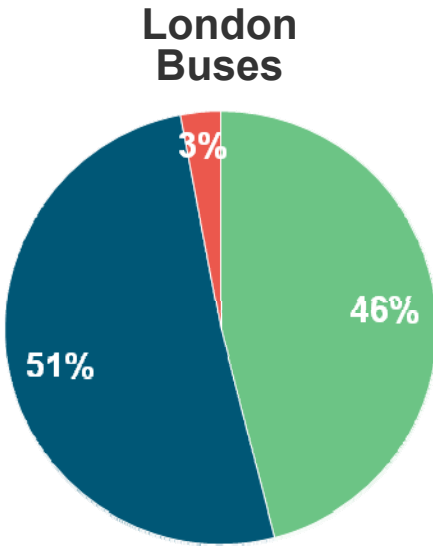
Q Which of these statements best applies to you . . . ?



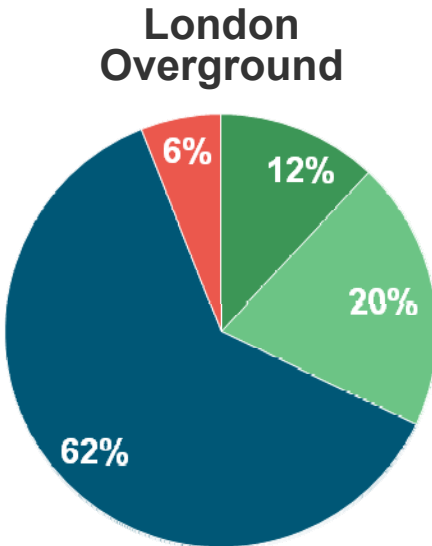
Net advocacy +24



+24



+43

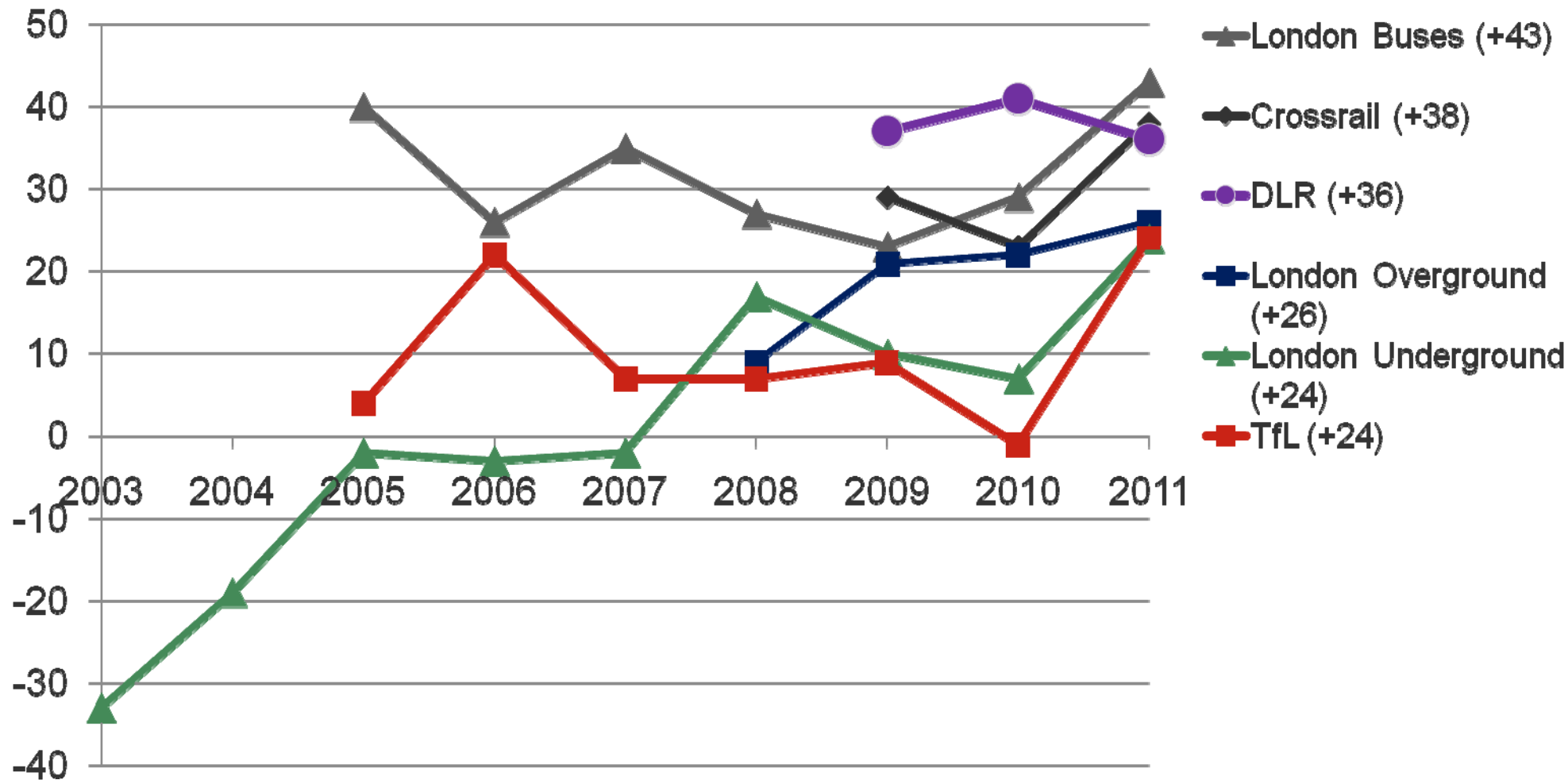


+26

Base: All Transport Journalists who have heard of each company, 2011

After a decline in '10, advocacy for TfL this year has increased significantly, as it has for LB, Crossrail and LU

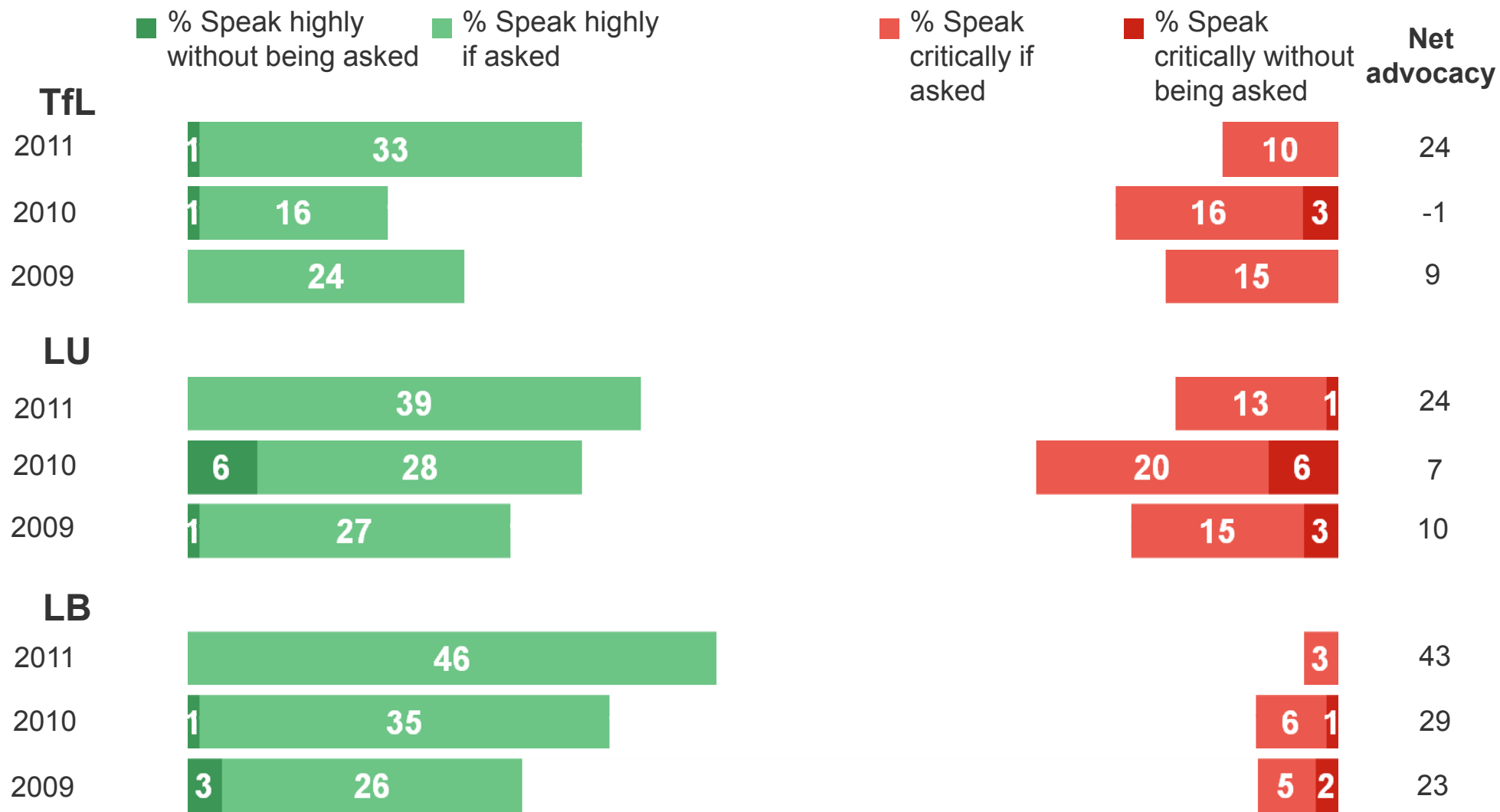
±% Net Advocacy



Base: All Transport Journalists who have at least heard of each company, 2011

Not only have advocacy levels recovered from the low of '10, levels of criticism have fallen away

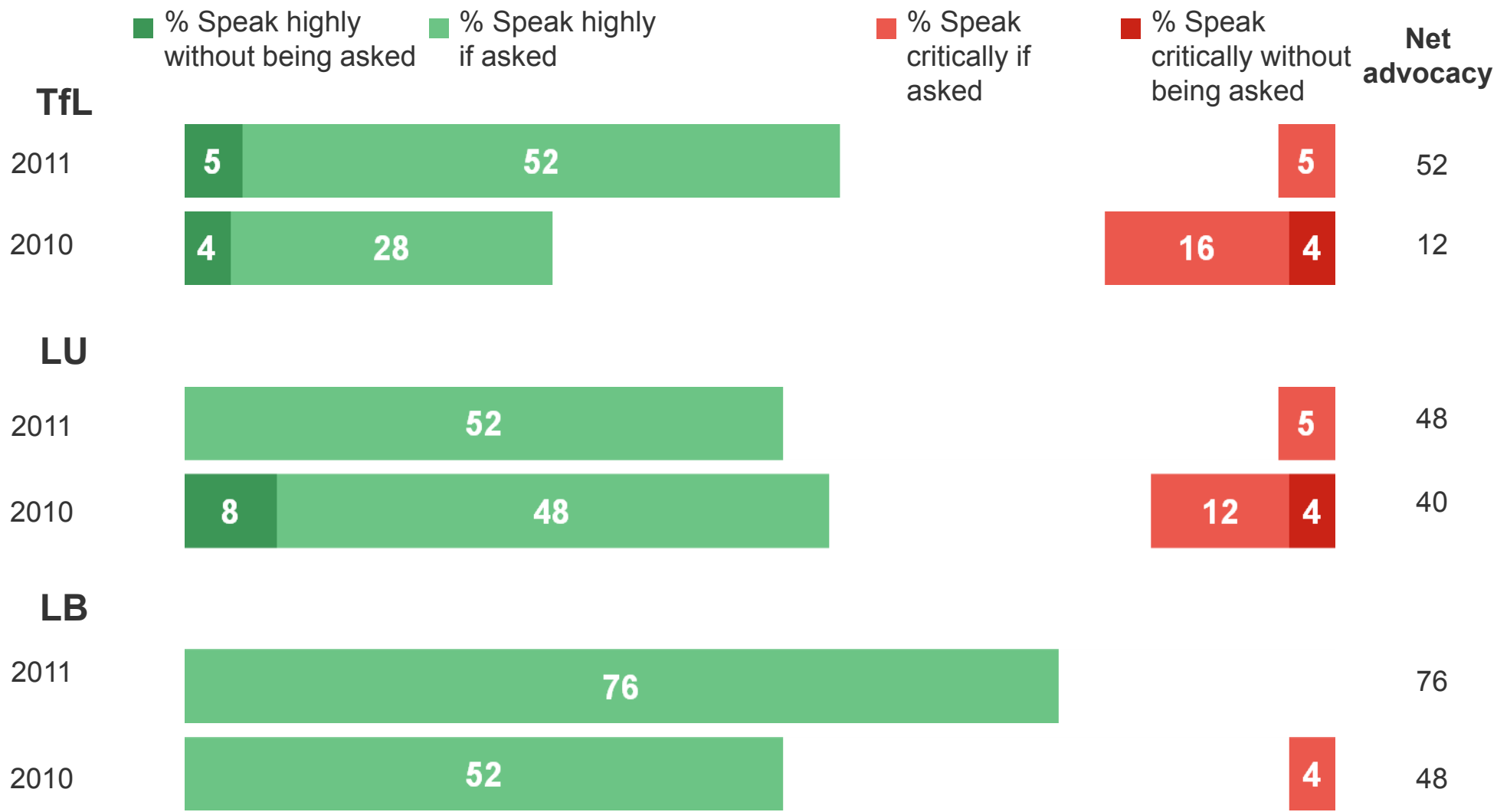
Q Which of these statements best applies to you . . . ?



Base: All Transport Journalists who have at least heard of each company, 2011

Among key journalists*, levels of criticism have fallen for all three organisations, while advocacy levels have risen for TfL and LB

Q Which of these statements best applies to you . . . ?

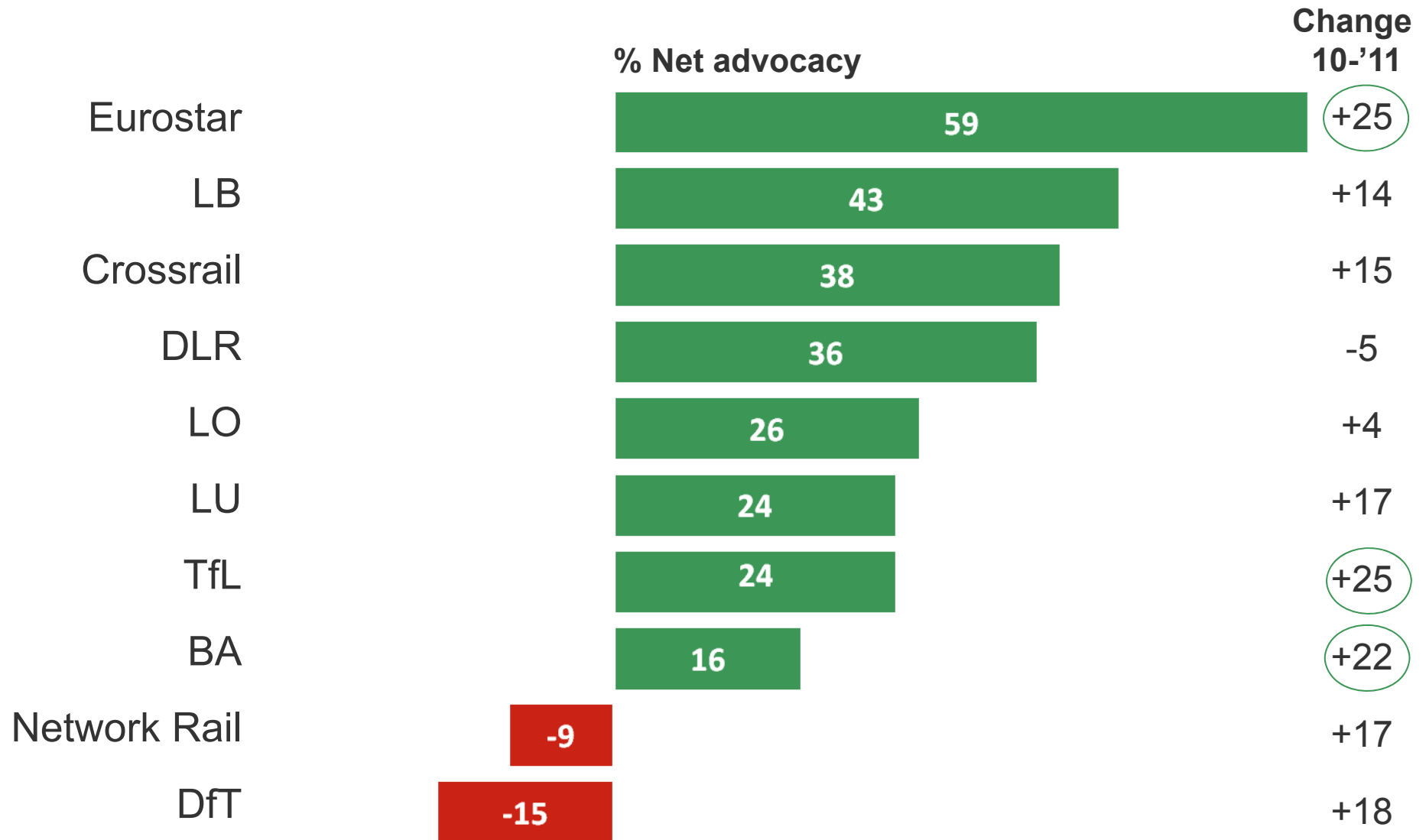


Base: All key Transport Journalists who have at least heard of each company, 2011

* WARNING: SMALL BASE SIZE

With the exception of DLR, net advocacy has increased across the board

C7 To what extent would you speak highly or critically about?



Base: All Transport Journalists who have at least heard of each company, 2011

Perceptions of TfL

TfL's roles and responsibilities
TfL's strengths & weaknesses

Perceptions of TfL - 1

TfL's roles and responsibilities

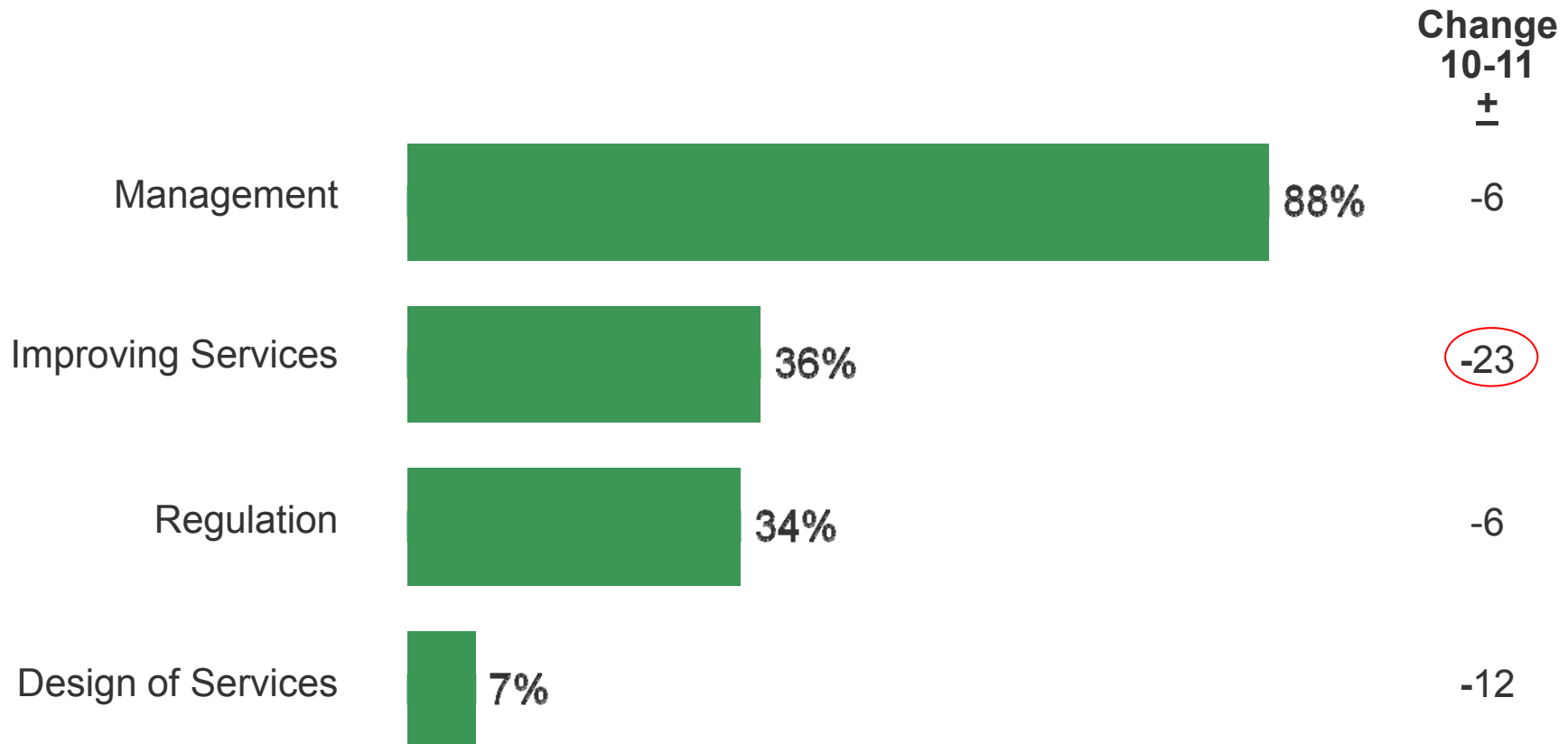
- As in 2010, almost all – around nine in ten (88%) – Transport Journalists see TfL as an organisation whose main responsibility is management of the transport system
- Key responsibilities within this role include managing the various modes – London Underground, London Buses and so on – as well as managing London's transport strategy, similar to 2010. There is greater awareness of the TfL's role in managing London Trams than last year
- While improving services is seen as a key responsibility for TfL, mentions of this have declined by 23 points since 2010
- Within this role, the top mention is improving conditions for cycling, as it was last year. Relatively speaking, the other services receive little recognition
- One-in-three journalists (34%) see regulation as one of TfL's roles, similar to last year. The key aspect of regulation is felt to be running the congestion charge scheme

TfL's strengths and weaknesses

- In line with the findings elsewhere in this report, journalists are now most likely to list the bus network and investment in it as TfL's main strength. Nearly one in four (25%) say this, an increase of 10 points over last year
- More generally, keeping an integrated transport system like London's running is also felt to be a strength. Successfully managing London's transport system is mentioned by close to a quarter of journalists (23%), while around one in five (21%) refer to the integrated network as a strength
- Unsurprisingly, given the recent strike threats, there is concern among journalists regarding problems with industrial relations – one in five (19%) mention this issue as a major weakness
- Interestingly, while political interference from the Mayor was the key weakness last year, relatively few – just one in ten (11%) – mention it this year, a decline of 17 points

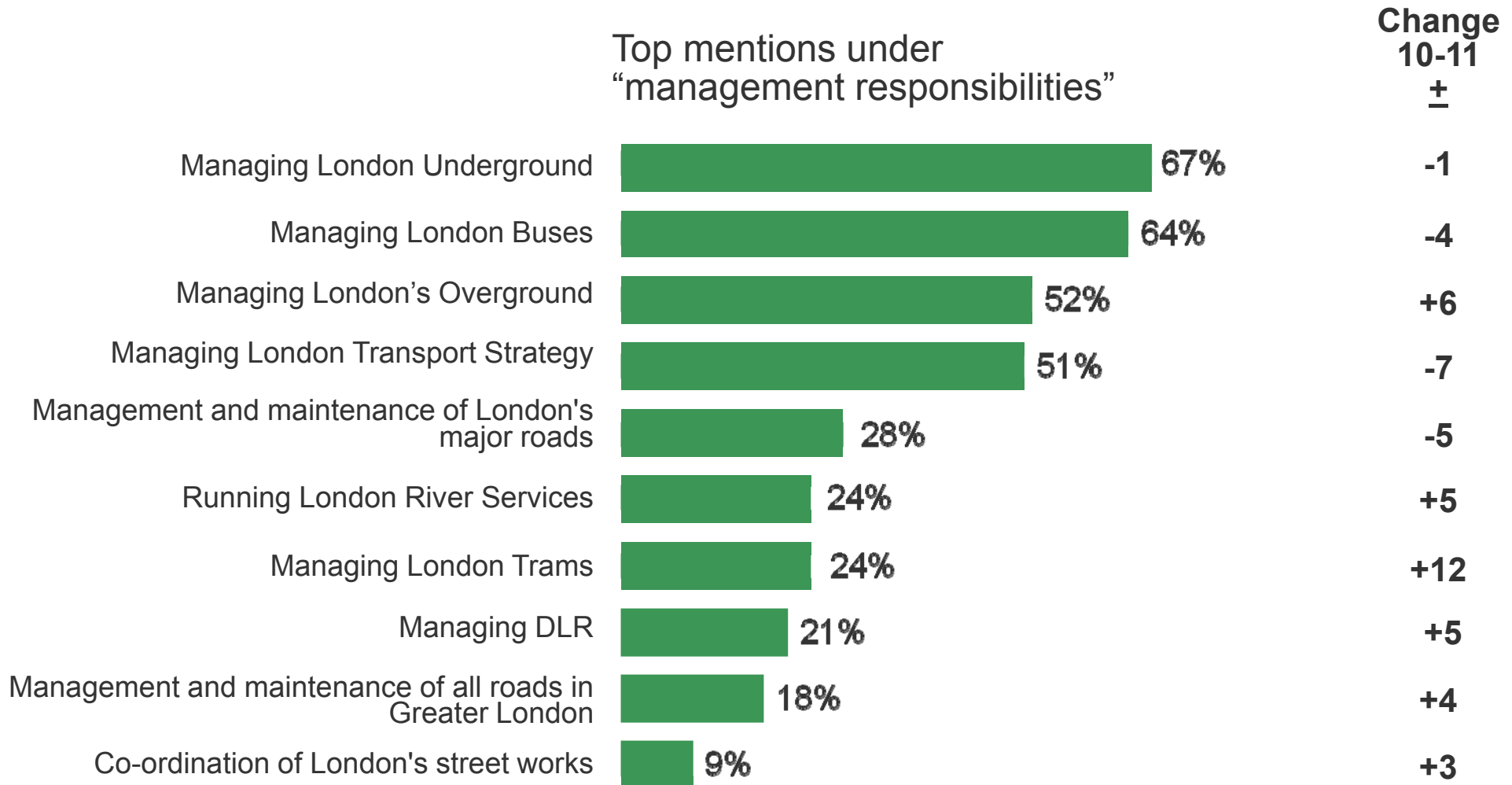
TfL's key responsibilities remain 'management of services' but fewer journalists feel it is responsible for improving services. After improved scores in '10, scores have fallen back to or below the '09 levels

Q What do you consider Transport for London's responsibilities to be?



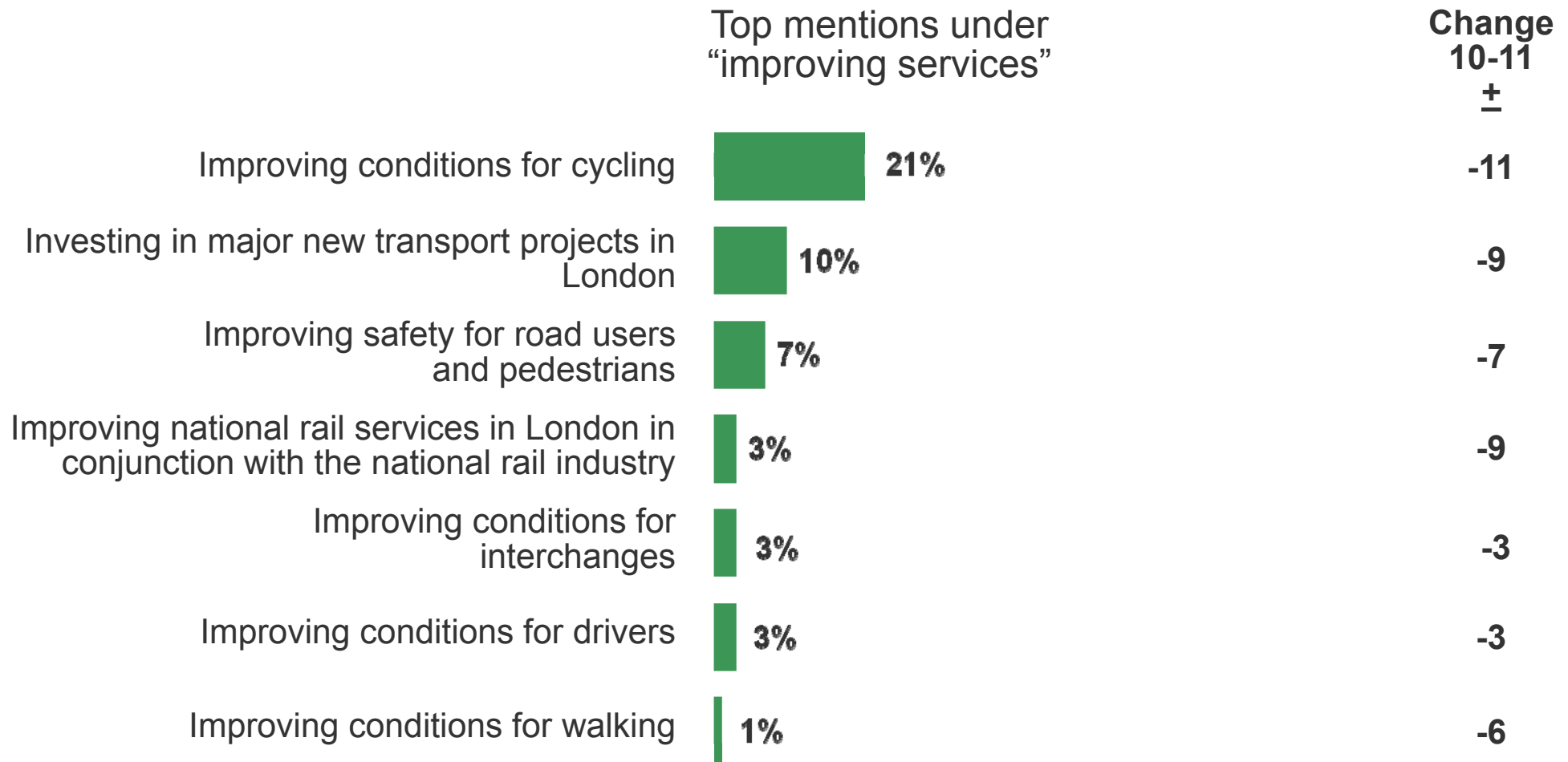
As before, the main responsibilities of TfL are seen to be transport strategy alongside management of the associated organisations – journalists are much more likely to mention London Trams in this regard

Q What do you consider Transport for London's responsibilities to be?



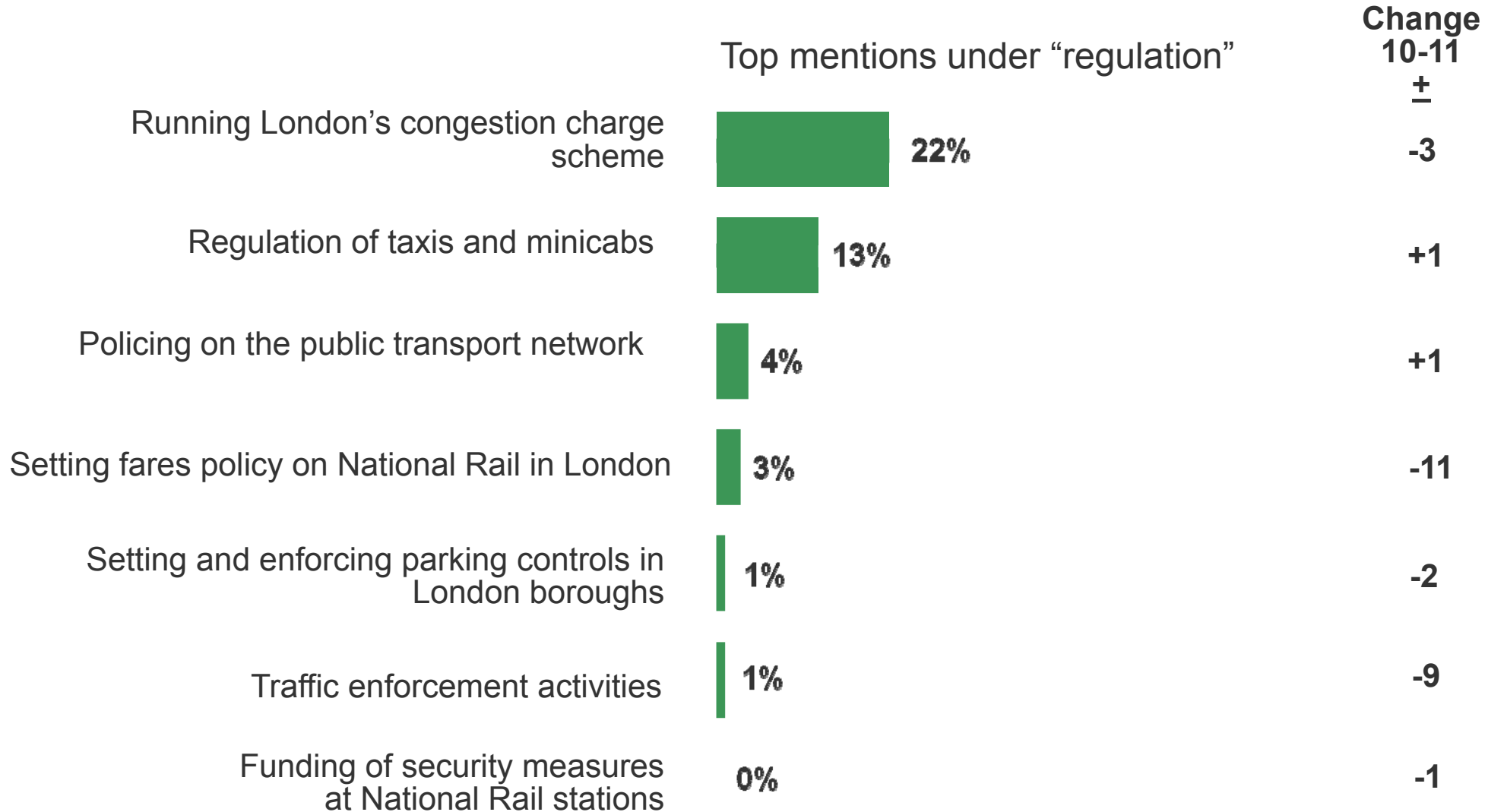
Improving cycling conditions again dominates mentions for 'improving services', while journalists are now much less likely to think TfL is responsible for improving services generally

Q What do you consider Transport for London's responsibilities to be?



Journalists are much less likely to think that TfL has responsibility for setting National Rail fares in London, while the c-charge is still seen as the key regulatory responsibility

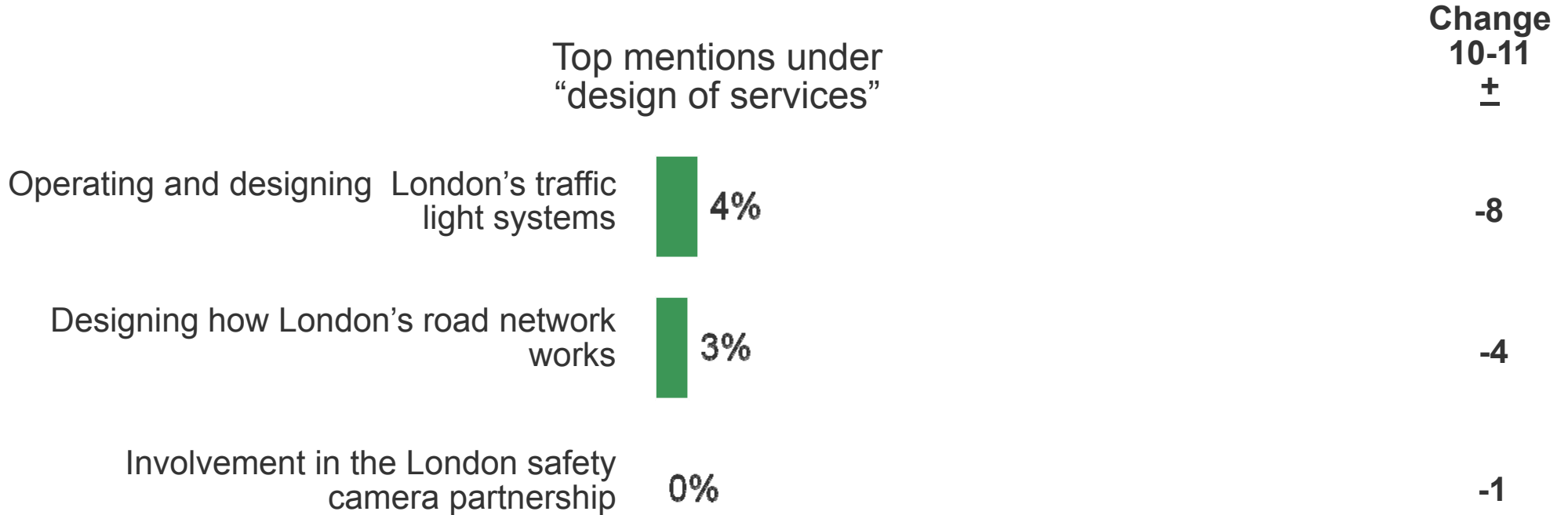
Q What do you consider Transport for London's responsibilities to be?



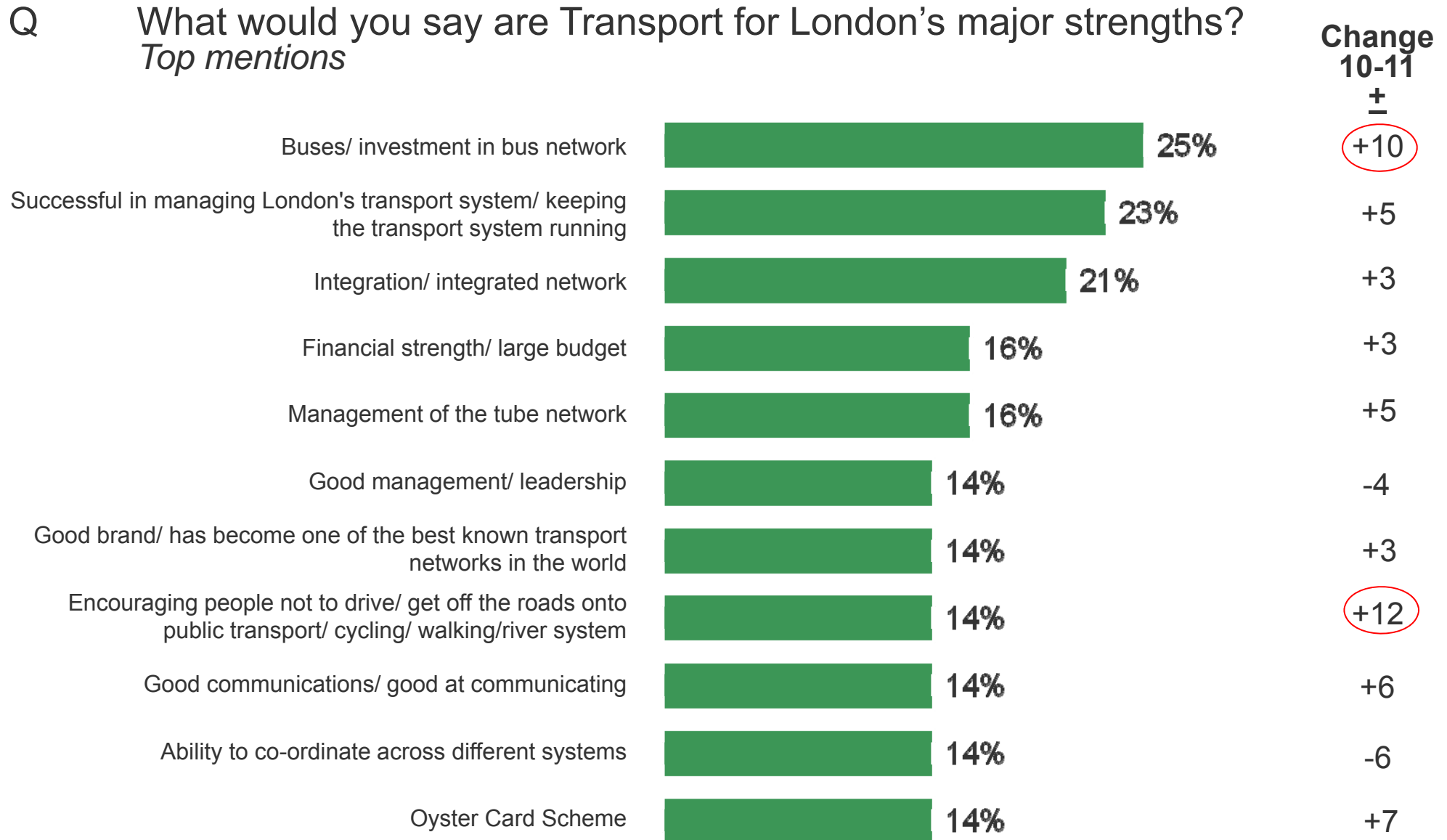
Base: All Transport Journalists who have heard of TfL (69), 2011

TfL – Design of services

Q What do you consider Transport for London’s responsibilities to be?



TfL's key strengths: investment in buses (formerly a weakness), managing and integrating the transport network. Large increase in encouraging people to cycle, walk and use public transport



Base: All Transport Journalists who know at least a little about Transport for London (57), 2011

Verbatim comments – Strengths

The bus network has improved through investment

“Its bus and tube networks operate very efficiently, given the number of people they carry. There is a lot of bad press and moaning about tube and bus networks not operating properly but anecdotally the tube and bus networks work pretty well, and they should do, given the amount of money that has been invested in them” Non-attributable

“They've been brilliant at putting more buses onto the streets over the last ten years” Non-attributable

“They've improved the London bus services in the last five, ten years probably. Greater investment, there are more buses” Nick Edwards,
Construction News

“The night buses have improved greatly in the past few years, bringing down the price to the same as the day buses. And also the frequency of the bus network generally, they are frequent now. Having times on bus shelters so you can see when the next one is a large improvement. Before you never knew when the next one was coming along, so having them on a number of stops is very useful. Improving the ways that the timetables are laid out, having a map similar to the London Tube map is more useful to the way they are communicating where the buses are going” John Higginson,
Metro London

Verbatim comments – Strengths

Successfully managing an integrated system (1)

“It is a very well managed professional organisation, there are a lot of good people and expertise in there. It is well branded and easy to understand. It offers a total solution that you just don't see anywhere else” Non-attributable

“To manage a very complicated timetable of trains on conflicting lines and crossings and signals, the teamwork and infrastructure is clearly very good” Non-attributable

*“The public transport network in London is actually fairly good and it is managed by TfL so they are managing something that works and functions. Of course there is room for improvement, but we have a rather good public transport system. It's world class, it could be better but it's world class, so their strength is in coordinating that and managing it”
Greg Truscott, South London Press*

“They have a clear plan, a clear strategy, they know that London is growing and they know what they want to do to get into that growth. It's set out clearly and they have argued well so far with government to get the funding that they want to deliver on it...And they have the vision for the stuff they want to do in the future. They have a strategy for suburban rail lines which seems like a good idea. Generally speaking they have good senior management” Non-attributable

Verbatim comments – Strengths

Successfully managing an integrated system (2)

“They can take an integrated view and they have responsibility over different modes of transport from the Underground, Overground, tram systems, public transport in generally really. I know they have limited control over rail but they have an integrated view, they are quite powerful in terms of their management and having quite a reasonable financial settlement and so they have been able to do good things to integrate transport and make it work effectively” Non-attributable

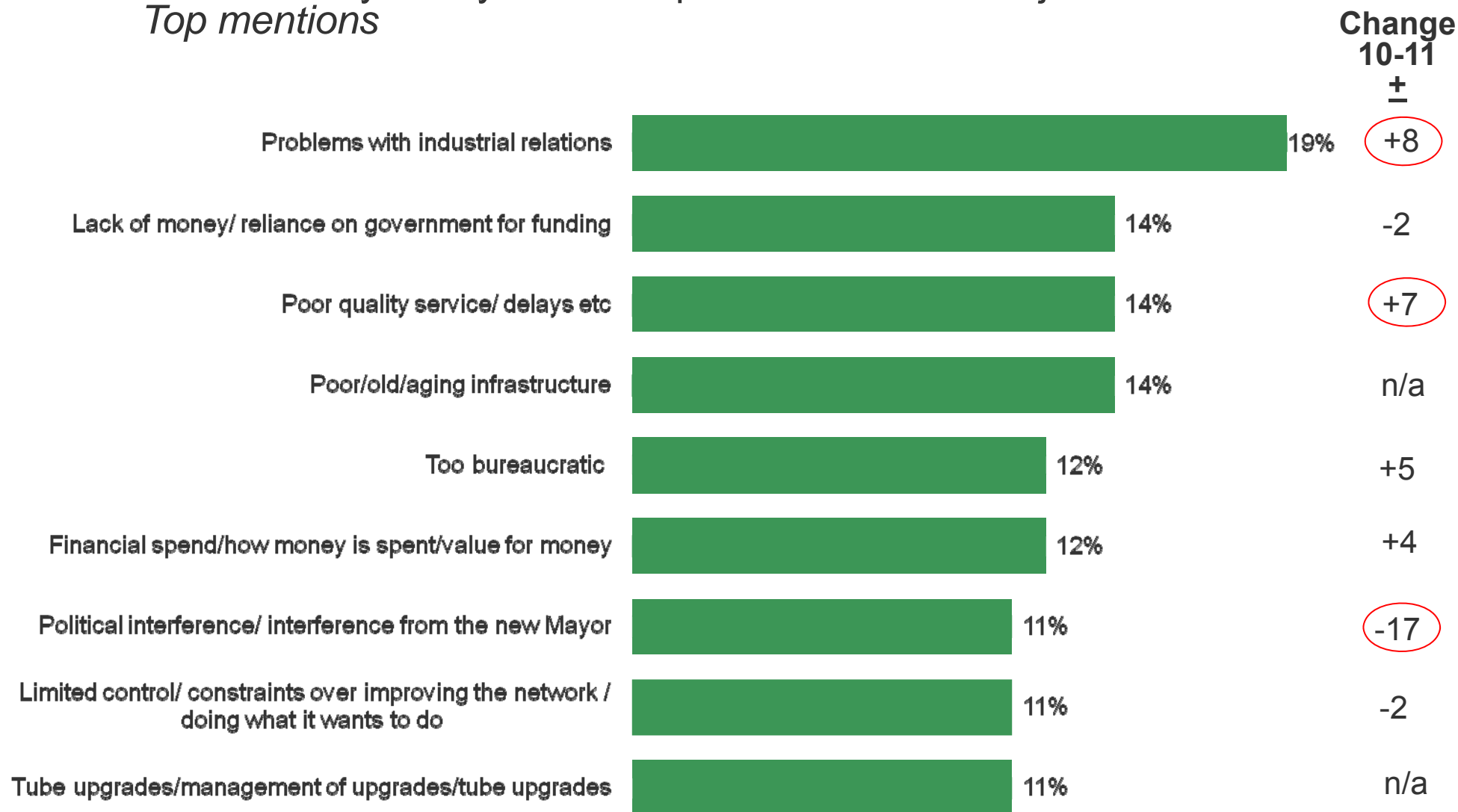
“Its use of new technologies particularly with regards journey planners basically helping people to use the transport system and actually having a fully integrated transport system” Non-attributable

“Trying to weave those into what feels like a coherent transport package is a tricky thing to do and they do that very well” Gareth Edwards, London Reconnections

“[They have] integrated all those different transport functions. Having improved the buses, largely improved the Tube, created the London Overground and done the Congestion Charge” Christian Wolmar, Freelance

Strikes, industrial relations, ageing infrastructure and delays are the main weaknesses. Political interference much less of a problem compared to last year

Q What would you say are Transport for London's major weaknesses?
Top mentions



Base: All Transport Journalists who know at least a little about Transport for London (57), 2011

Verbatim comments – Weaknesses

Industrial relations

“They have an appalling industrial relations record with the three main unions. The unions in London are certainly not the easiest to get on with, they are the last of the old dinosaur unions and can still wield the threat to stop London which they have done in the past. Sometimes the way London Underground handled negotiations make you wince, where you can see a dispute happening before it even begins. Their industrial relations with the unions need to be a lot better” Non-attributable

“They are not wonderful at their industry relations. Whilst there is fault on both sides...there are things TfL could do to improve that relationship just as much as the unions. Occasionally it gets forgotten that the people caught in the middle are the passengers” Gareth Edwards, London Reconnections

“The main problem seems to be the industrial relations issue, that’s the one that always crops up when you’re talking about Transport for London and it seems to have been ever so. They do not seem to get on with the unions basically, there’s friction” Non-attributable

“Its perennial problem is the relations with the staff on the Tube that’s prone to strikes and that’s a weakness” Non-attributable

Verbatim comments – Weaknesses

Ageing infrastructure and a lack of funding

Infrastructure issues...

“They could be investing a little bit more in the infrastructure, in terms of ageing rolling stock on the Underground. In some places it is very nice, like on the Jubilee Line, but some of the lines like the Northern Line can be very congested” Non-attributable

“The really old infrastructure. The fact that what they are dealing with is ancient and needs a lot of work” Non-attributable

“It struggles in terms of the complexity and the age of the system. The Tube constantly needs renovation and it has to do that while people are still travelling. It ends up with a lot of anguish caused by closures. It’s just the difficulty of modernising the system while keeping people able to move”
Ross Lydall, The Evening Standard

Funding issues...

“Not having enough money to do everything it wants to do, it's got lots of ideas. It's really battled for Crossrail and again that's another one of its achievements. Simply it just doesn't have the finances it wants to do. The ideas are there it's just the case of the money” Mike Pearse, ITV

“Lack of money and also being able to forward plan effectively for the future. Where in the future is the investment going to go or come from to bring London's transport up to the 21st century?” Non-attributable

TfL's vision

London's transport policy issues
TfL's vision

London's transport policy issues

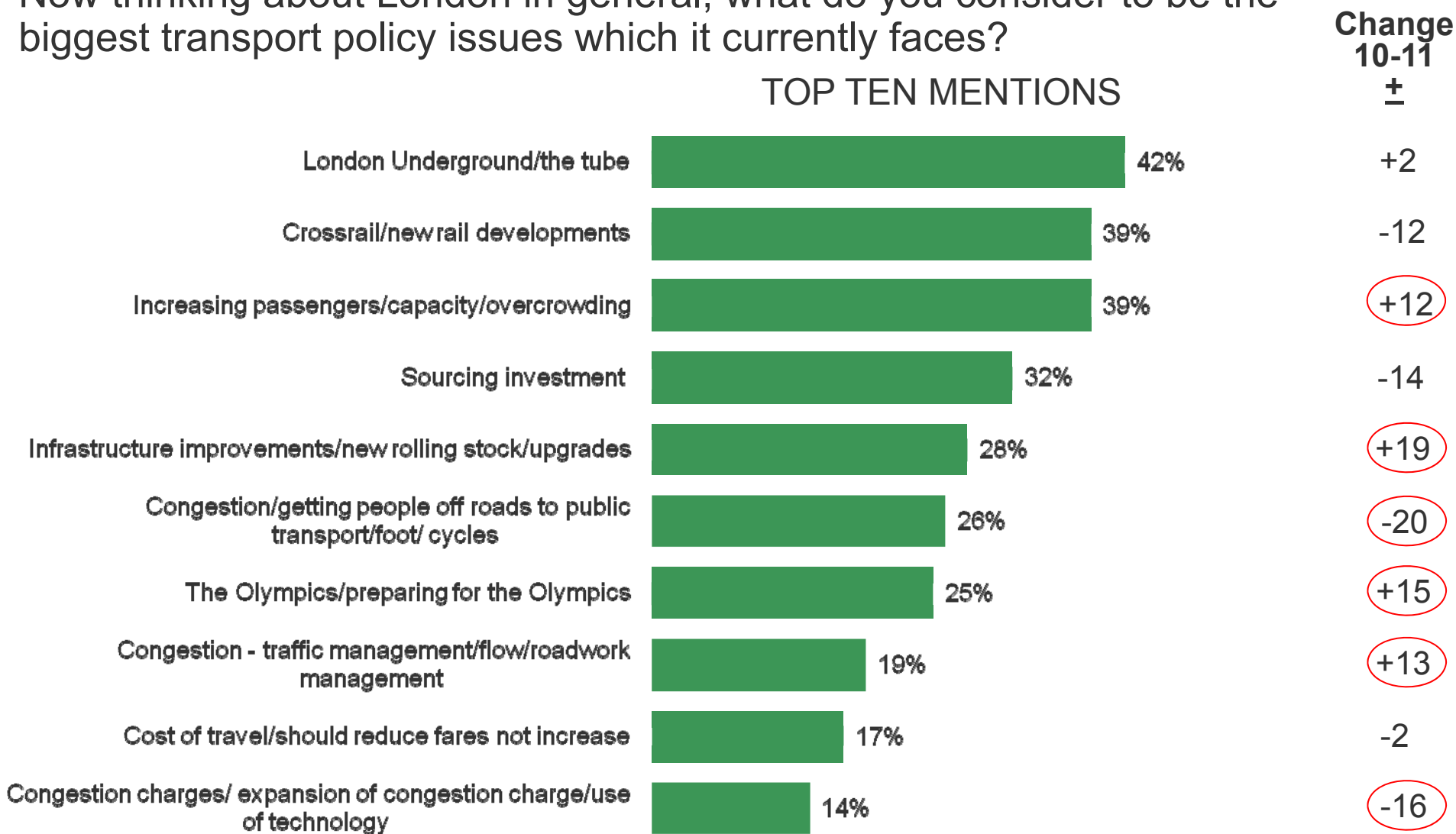
- Journalists are less concerned about Crossrail than in previous years – while it remains a top transport issue for London, with two in five (39%) of journalists mentioning it, this represents a decline of 12 percentage points since 2010
- The tube remains a key concern, with just over two in five (42%) mentioning this issue
- Congestion/getting people off roads is now less of a concern with 26% of Transport Journalists mentioning this, compared to 46% last year
- Conversely, concerns about overcrowding and passenger capacity have increased by 12 percentage points in the last year – one in five (39%) now cite this as a key issue facing TfL
- While one in four (24%) mentioned concerns about buses last year, this has fallen back to 2009 levels – around one in ten (12%) – this year
- Journalists increasingly see preparing for next year's Olympics as a key issue for TfL – a quarter think this is an important issue, up 15 percentage points compared to 2010
- These main concerns are echoed among key journalists, though key journalists tend to be more concerned than the wider group about cycling and industrial relations

TfL's vision

- Transport Journalists are increasingly well informed about TfL's vision for the future of transport – close to two-thirds (63%) say they feel very or fairly well informed, which compares to 49% two years ago
- Key journalists and journalists who write for periodicals continue to be the most informed about TfL's future vision
- The proportion who think the vision is realistic has also increased – close to three quarters (72%) now feel this way. Key journalists and those who write for periodicals are, again, most likely to feel this way
- Similarly, trust in TfL to deliver on the vision has also increased since 2010 – three in five (61%) have 'a great' or 'a fair amount' of trust in TfL being able to deliver

Crossrail and the tube remain key issues, but overcrowding, infrastructure improvements and preparing for the Olympics increasing. C-charge much less important than last year

Q Now thinking about London in general, what do you consider to be the biggest transport policy issues which it currently faces?



London's transport policy issues - Crossrail

“Projects like Crossrail will solve issues for a few years but again, the amount of money it is costing, it is not going to solve problems that you would expect it to for that cost”
Non-attributable

“Crossrail is a great step in the right direction but it is costing about twice what it should do” Chris Jackson, Railway Gazette International

“Its top priorities at the moment are to make sure Crossrail is delivered on time and on budget, making sure the Tube upgrade programme is delivered in full”
Non-attributable

“It's still Crossrail and the vast amount of money that is being spent on Crossrail and Thameslink and the envious eyes that the rest of the country has on London. I know Boris Johnson sticks up for it and with the Olympics coming they do need to get it right, but the balance of spending on London and the regions has to be redressed” Alan Salter, Manchester Evening News

London's transport policy issues - Sources of investment

“It really is the case of investment, how much money there is to invest over coming years. Transport for London fights very hard, it gets a reasonable amount of money to do its job in terms of transport. But it has to keep its eye on the ball in terms of having enough money to invest. If not, things will get even worse” Mike Pearse, ITV

“Under investment into the Tube, they need to pick that up and they need to sort out their contractors as well for the National Rail services” Non-attributable

“The Tubes and the fact that investment is needed there and whether the investment is forthcoming” Non-attributable

“They face the same problems as the nation does. Let's look at an organisation like TfL now operating the trains, the buses and everything else, that's going to have its budget squeezed. If it has its budget squeezed it is going to have to provide the same for less, or not, as the case may be” Greg Truscott, South London Press

London's transport policy issues - Infrastructure and upgrades

“Things like undertaking major transport works whilst keeping transport flowing. There are big station works going on in London but they have to try and keep people on the move while they do it. There are some Tube upgrades going on, again they have to find ways of minimising disruption to passengers. Preparing for the Olympics must be massive for all modes of transport” Katie Silvester, Rail Professional

“The Tube upgrade and keeping that on track at the same time as minimising disruption” Non-attributable

“The cost of the ongoing Tube upgrade work is very substantial and will be squeezed like every other piece of infrastructure spending that we have” Non-attributable

“How best to maintain and upgrade what is basically a 19th century infrastructure, particularly the Underground which continues to be a source of considerable upset, particularly to the tourist industry, it is mostly weekend works that cause disruption. There needs to be an awful lot of lessons taken from other parts of the world where they have similarly ageing Underground systems to work out how they manage to keep them running without closing large parts of the network every weekend. People are angry putting up with so much disruption from Crossrail but infrastructure projects like that take a long time” Simon Calder, The Independent

London's transport policy issues - Congestion

"Handling the volume of people travelling into, and within, London. Ninety percent of people going into central London are doing so by public transport. That number is going to grow, so Thameslink, Crossrail, more people on buses. It is just dealing with the volume is the prime issue" Paul Clifton, BBC South

"The Underground can't cope with the number of people going through it, particularly with the Olympics in mind"
Non-attributable

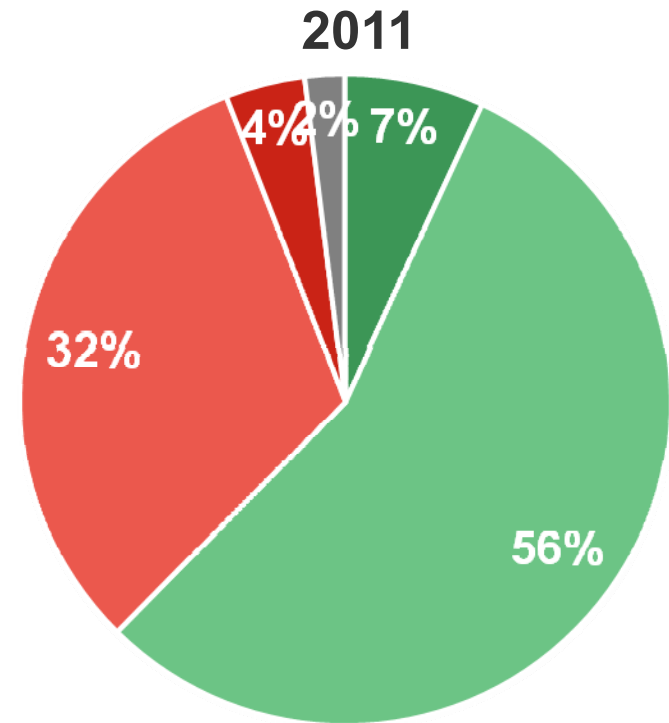
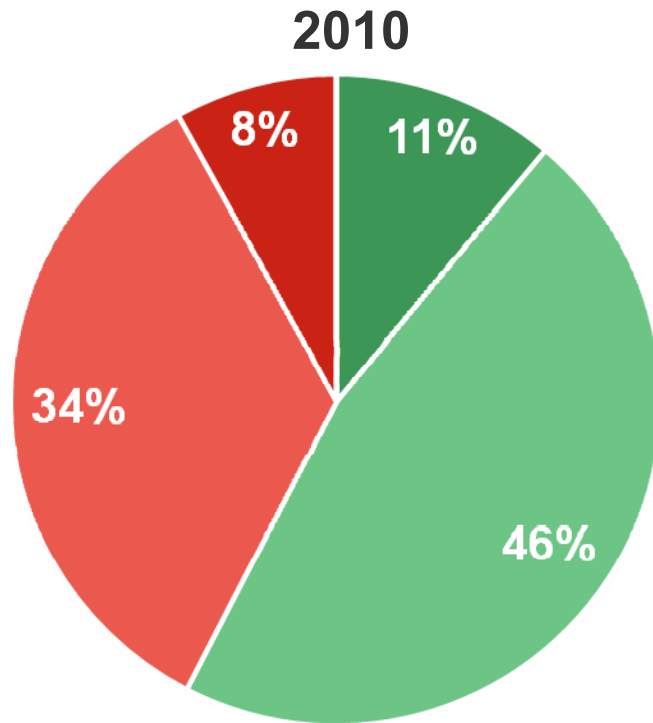
"It just seems to throw money at transport in London and never seems to actually solve any of the problems. It always seems to be at capacity"
Non-attributable

"Sheer volume of numbers on the Underground making travel really unpleasant, very, very overcrowded Tube trains and in the buses the roads are very congested and it can take a very long time to get from A to B. So you've got a bit of a choice between a very unpleasant overcrowded Tube train which perhaps will get from A to B provided they don't break down or going on a bus and getting stuck in traffic going through town" Non-attributable

Journalists continue to feel better informed than the previous year

Q How well informed do you feel about TfL's vision for the future of transport in London?

Very well informed Fairly well informed Not very well informed Not at all informed/ have not heard about it Don't know

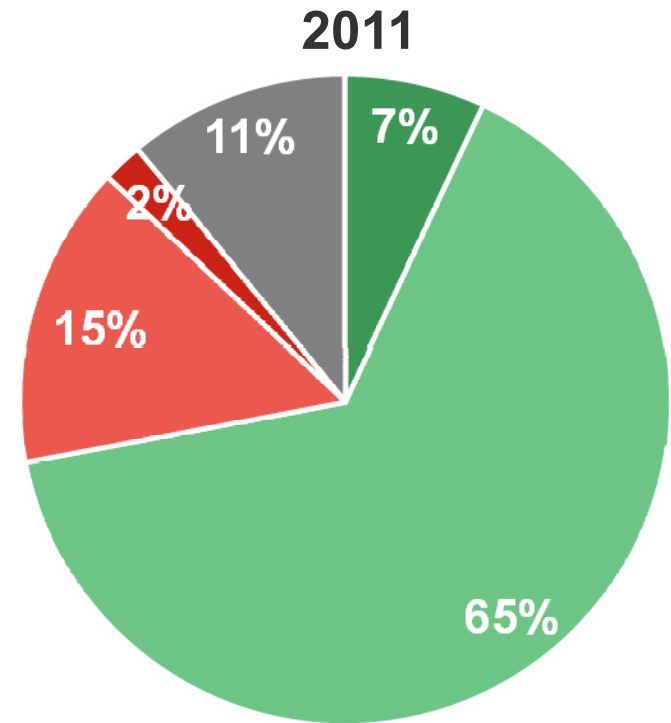
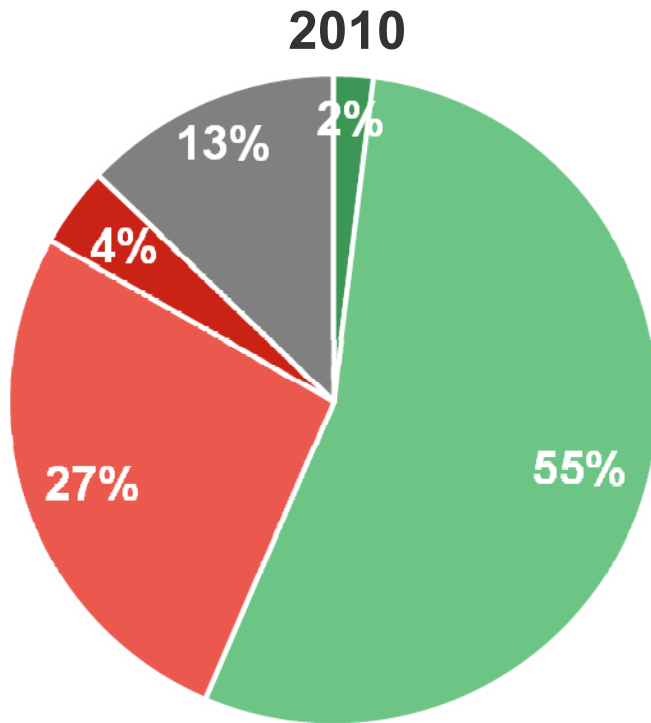


Base: All who know at least a little about Transport for London (57), 2011

Approaching three quarters of journalists now feel that the vision is realistic

Q How realistic do you think that vision is?

Very realistic Fairly realistic Fairly unrealistic Very unrealistic Don't know

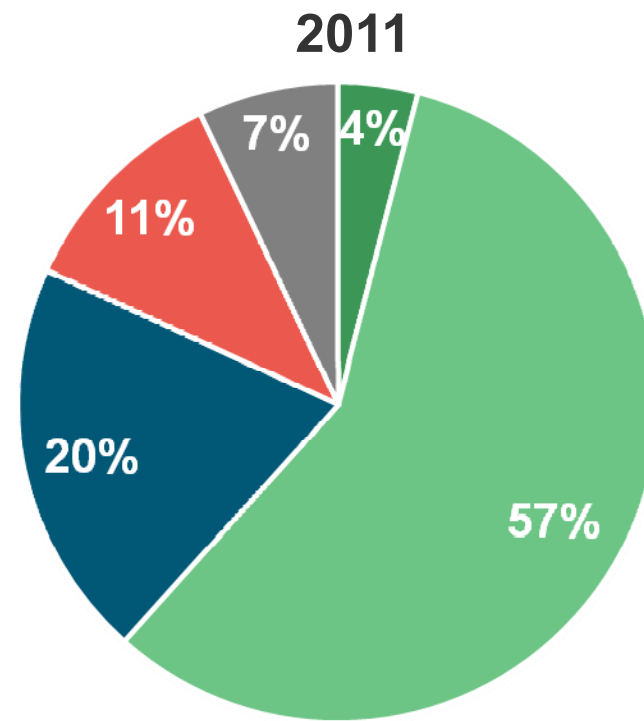
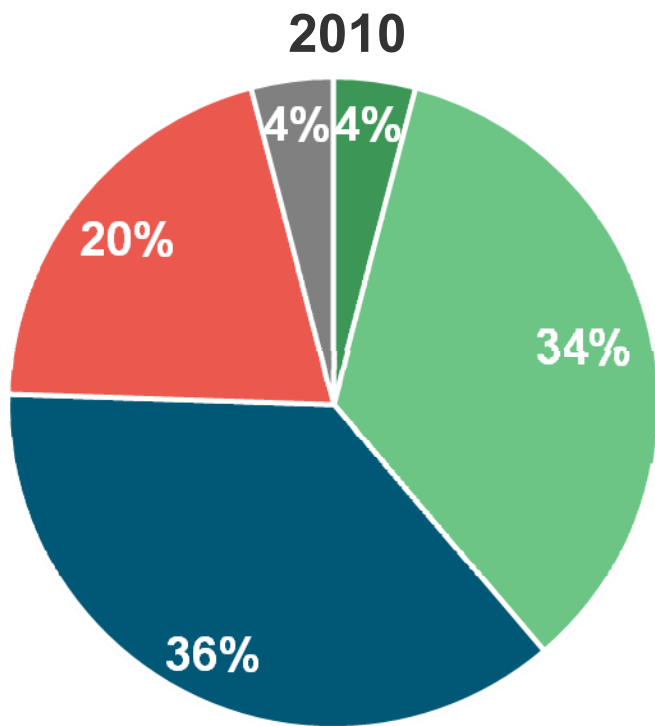


Base: All Transport Journalists who have at least heard about TfL's vision for the future of Transport in London (54), 2011

More than three fifths of journalists now trust TfL to deliver their vision, a significant increase from 2010

Q How well do you trust TfL to deliver on that vision?

■ A great deal ■ A fair amount ■ A little ■ Not a lot ■ Not at all ■ Don't know



Base: All Transport Journalists who have at least heard about TfL's vision for the future of Transport in London (54), 2011

Investment

Perceptions of level of investment
How important is to maintain/increase investment

Investment

- While a large proportion (45%) of Transport Journalists continue to think that the level of investment in London over the past 5 years has been 'about right', this has declined since 2010 (54%)
- A similar proportion to 2010 think it has been 'too much' (6%). However, the proportion of those saying it has been 'too little' has increased to two fifths (37%), compared to less than three in ten (29%) last year
- Key journalists and those who write for periodicals are most likely to feel levels of investments have been insufficient
- It is encouraging that Transport Journalists continue to feel that investment in transport in London is a priority – more than eight in ten (84%) journalists feel it is extremely or very important to maintain levels of investment. Following a decline in 2010, a larger proportion of journalists now feel it is at least quite important to increase spending

Slightly fewer journalists feel that investment is about right, with more thinking it is too little

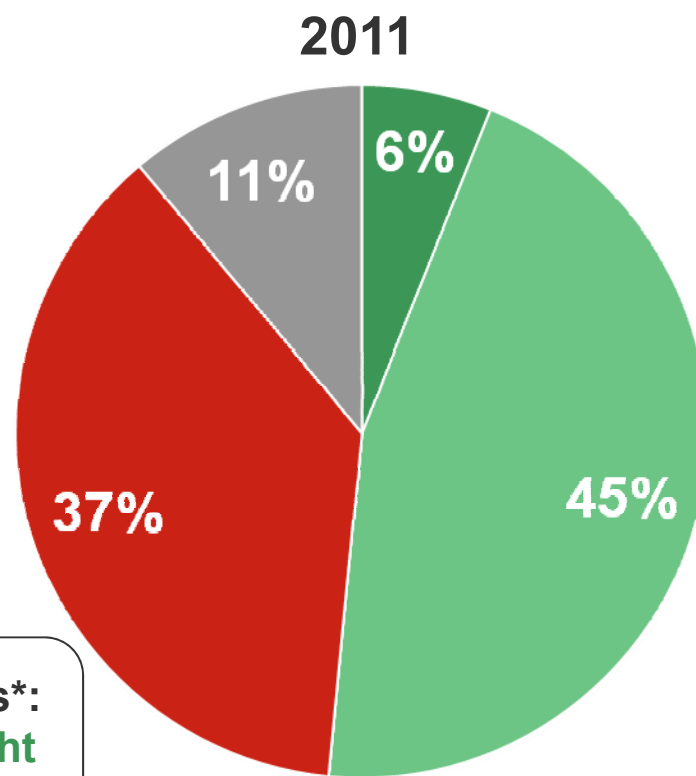
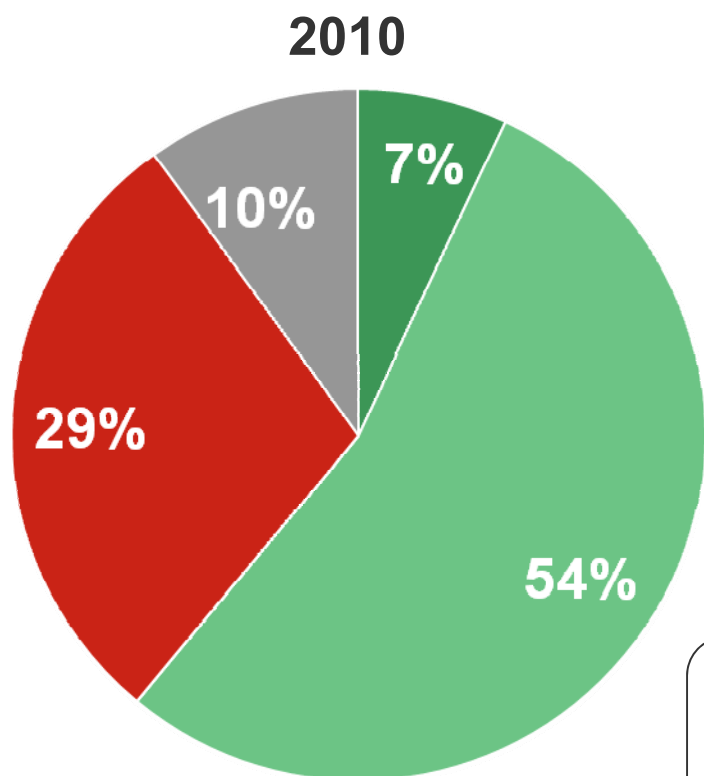
Q How would you describe the level of investment in transport in London over the past five years?

■ Too much

■ About right

■ Too little

■ Don't know (inc. those who have lived in London under 5 years)



Key journalists*:
67% About right
33% Too little

Base: All who have at least heard of Transport for London (67), 2011

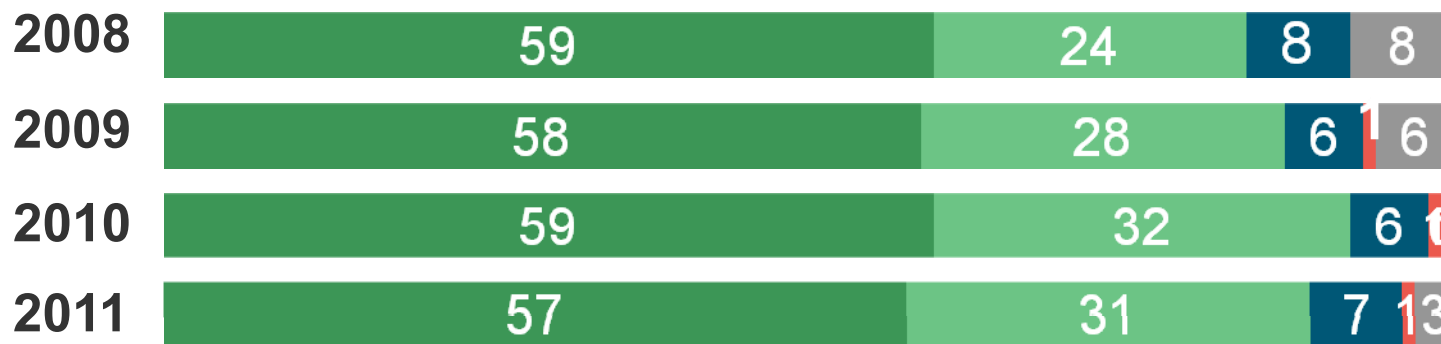
Nearly all journalists continue to support maintaining investment. Stronger support for increasing spend compared to last year

Q How important is it to London's future to...?

■ % Extremely important
 ■ % Very important
 ■ % Quite important
 ■ % Not very important
 ■ % Not at all important
 ■ % Don't know

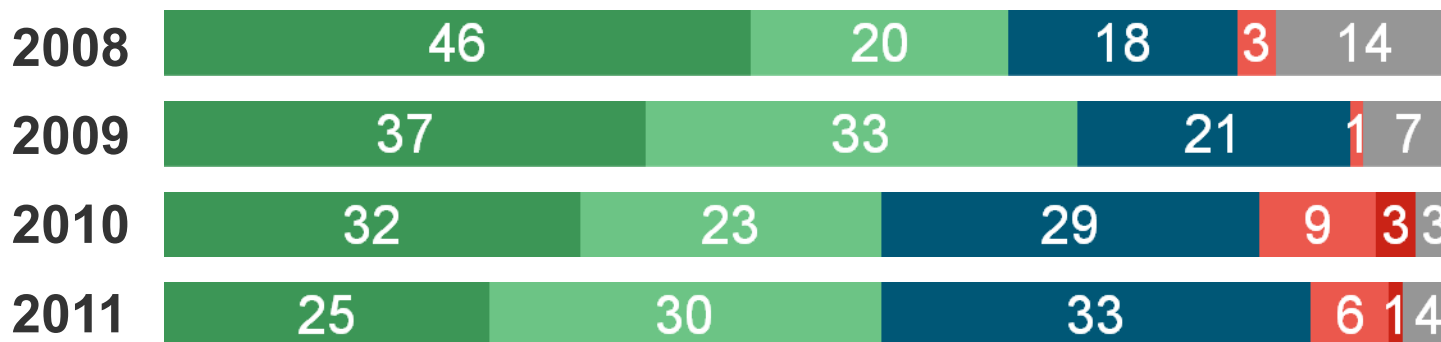
...maintain the planned level of investment in Transport for London

62% of Key journalists* say extremely important



...increase the planned level of investment in Transport for London

24% of Key journalists* say extremely important



* WARNING: SMALL BASE SIZE

Base: All who have at least heard of London Underground (67) 2011, (67) 2010, (67) 2009, (74) 2008

TfL's Business Objectives

Delivery on objectives

TfL's Business Objectives - 1

Confidence in TfL's ability to deliver on key Business Objectives has increased since 2010, in some cases substantially.

Business Objective 1 – To expand public transport capacity

- All four metrics under this Business Objective have seen a significant improvement in average ratings this year
- Confidence in TfL's ability to deliver Crossrail on time has risen – average ratings fell from 53 out of 100 in 2009 to 39 last year but now stands at 63
- More are also confident that TfL will successfully deliver improvements to the LO and DLR networks ahead of the 2012 games – the mean score out of 100 now stands at 70, up from 60 in 2010
- A majority – 53% – express confidence in TfL delivering improved reliability and faster journey times on the Tube. Journalists from the daily or Sunday press are least likely to think this will happen

TfL's Business Objectives - 2

Business Objective 2 – To smooth traffic flows

- Confidence in TfL being able to deliver on this strategic goal has also increased since last year and now exceeds the level seen in 2009
- The proportion who feel TfL is committed to re-phasing traffic lights has increased since 2009 (from 29% to 39%)
- The proportion who are confident that TfL will introduce a system for planning roadworks in order to reduce the disruption they cause has more than doubled since last year (33% now give a score of at least 7 out of 10 compared to 13% last year)

Business Objective 3 – To lead a revolution in cycling and walking in London

- Average ratings have improved significantly for two of the three metrics which fall under this Business Objective
- Following the introduction of the cycle hire scheme last summer, more than six in ten (61%) feel that TfL is committed to encouraging cycling
- As indicated by the high level of support for the cycle hire scheme and its objectives, a majority (51%) of journalists believe that TfL is encouraging a shift to more sustainable transport. Key Journalists and those writing for periodicals are most likely to believe this
- More than a third of journalists (37%) agree that TfL is supporting the infrastructure for electric vehicles

Business Objective 4 – To improve further the safety and security of the travelling public

- Statements relating to this strategic goal continue to receive the highest mean scores overall although there has been little change in the past year. However, for metrics relating to investing in police technology and working well with the police, both measures have steadily improved since 2009

Business Objective 5 – To dramatically improve the experience of travelling in London

- Overall there has been relatively little change in the mean scores on the statements relating to this strategic goal compared to last year
- Following increases in 2010, the proportion who agree that TfL is improving the environment on our streets and public spaces has remained constant in 2011
- Approaching three in ten (28%) now agree that TfL is improving door to door journey times compared to one in five in 2009. However, there has not been a significant improvement in the average ratings
- There continue to be relatively high scores for the remaining measures, with close to half of journalists agreeing that TfL runs a reliable transport system (49%), cares about its customers (46%) and operates an inclusive transport system (49%)

TfL's Business Objectives - 4

Business Objective 6 – To minimise transport impacts on the environment

- Mean scores on the components of this new objective have increased since 2010 – journalists are now more likely than before to agree that TfL is committed to improving air quality and reducing CO₂ emissions in London
- The proportion of journalists who agree that TfL is committed on this objective has improved with now at least two in five journalists agreeing with these two statements

Business Objective 7 – To ensure value for money

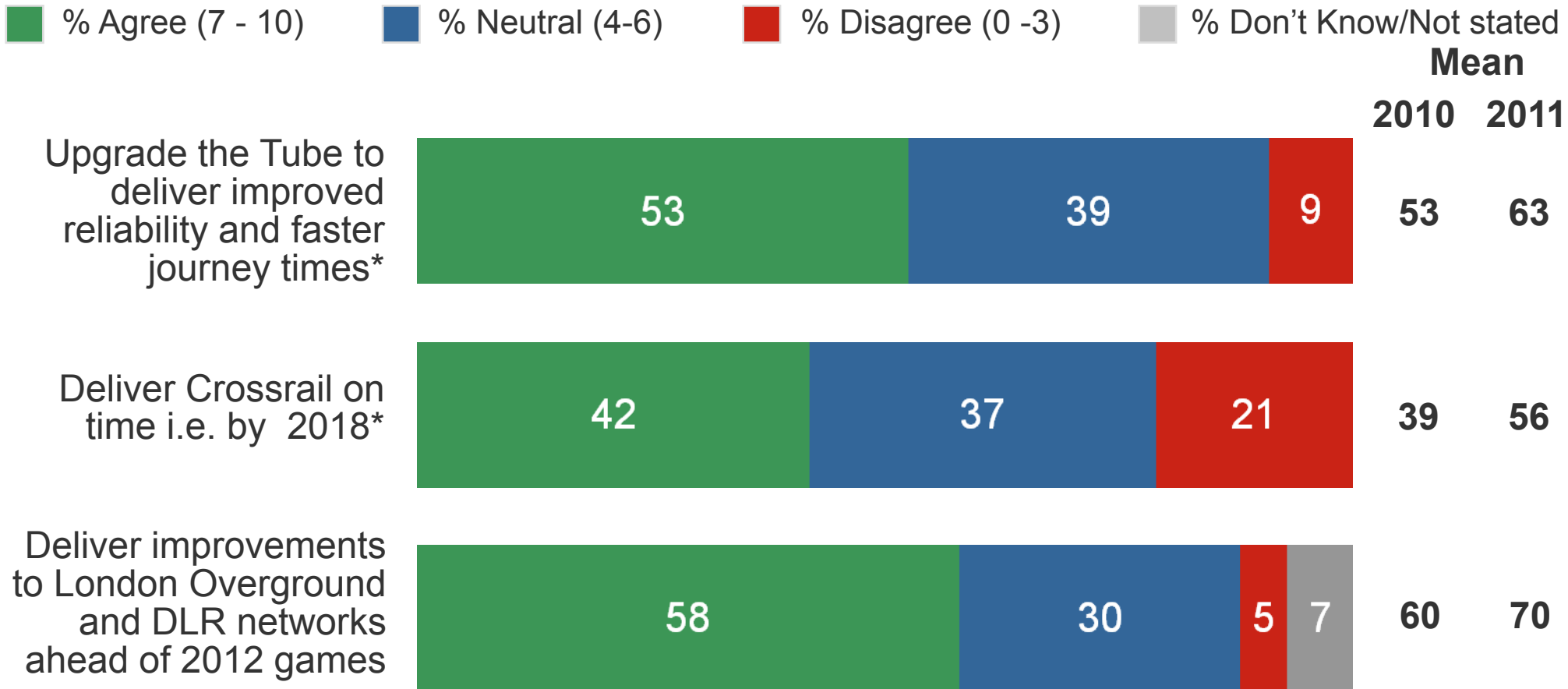
- Levels of agreement on the two measures relating to value for money have remained broadly constant over the past year
- Two in five journalists agree that TfL is a well-managed organisation, compared to one in five in 2009

Business Objective 8 – To deliver London's 2012 transport projects and secure a lasting legacy

- Encouragingly, the proportion who agree that TfL will successfully deliver transport projects to support the Olympics and provide a lasting legacy has increased since 2010
- More than six in ten (61% believe this to be the case now, compared to less than half (46%) last year
- Among key journalists, this rises to close to nine in ten (86%), though those who write for the daily / Sunday press are less optimistic, with just over half (53%) agreeing

Business Objective 1: To expand public transport capacity

Q Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel Transport for London...



* Wording on some of these questions has changed slightly from 2010

Business Objective 2: To smooth traffic flows

Q Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel Transport for London...

% Agree (7 - 10) **% Neutral (4-6)** **% Disagree (0 -3)** **% Don't Know/Not stated**

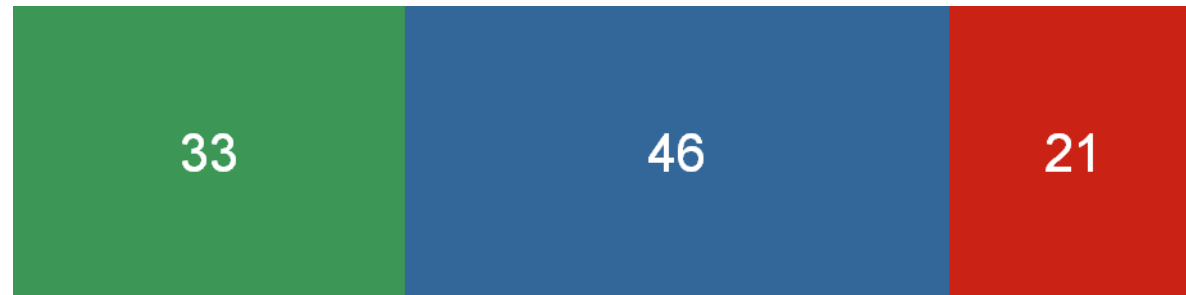
Mean
2010 2011

Re-phasing traffic lights to make best use of London's limited road space



52 61

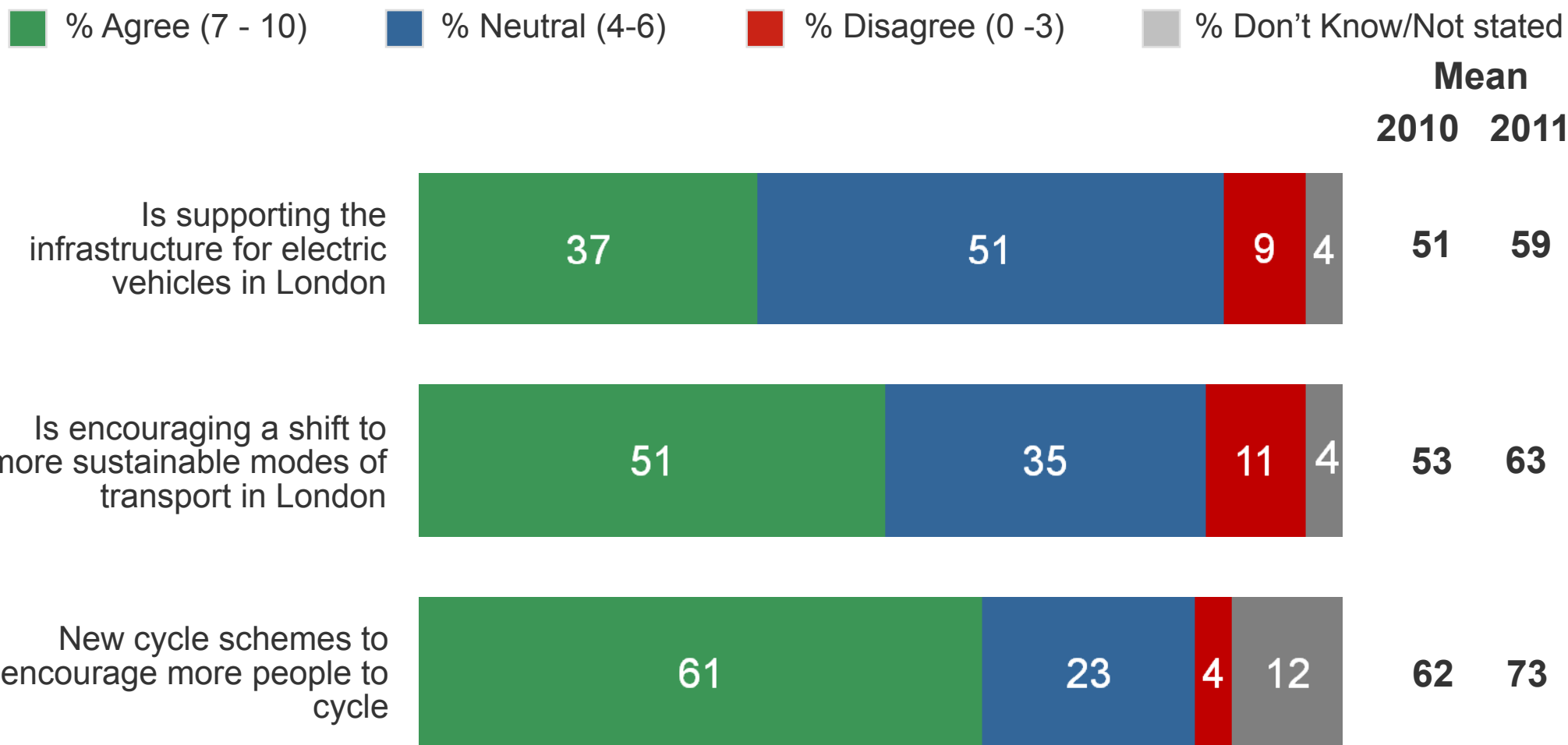
Introduce a system for roadworks in order to reduce the disruption they cause



41 53

Business Objective 3: To lead a revolution in cycling and walking in London

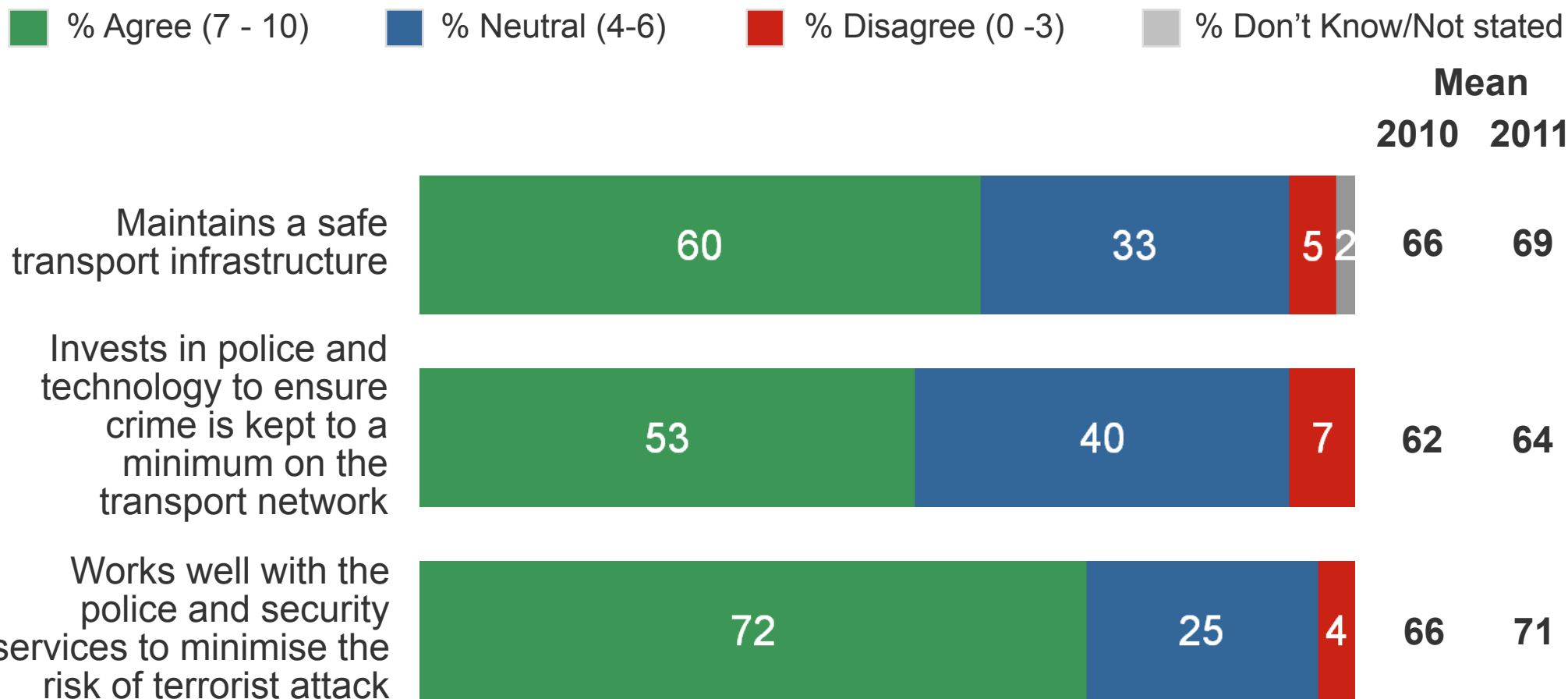
QTfL8 Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel Transport for London...



Base: All who know at least a little about Transport for London (57), 2011

Business Objective 4: To improve further the safety and security of the travelling public


Q Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel Transport for London...





Base: All who know at least a little about Transport for London (57), 2011


Business Objective 5: To dramatically improve the experience of travelling in London

Q Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel Transport for London...

 % Agree
(7 - 10)

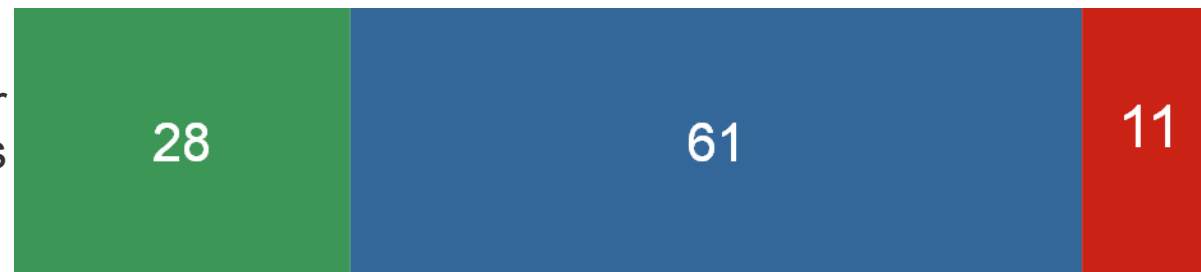
 % Neutral
(4-6)

 % Disagree
(0 -3)

 % Don't
Know/Not
stated

Mean
2010 2011

Is improving door to door
journey times



50 54

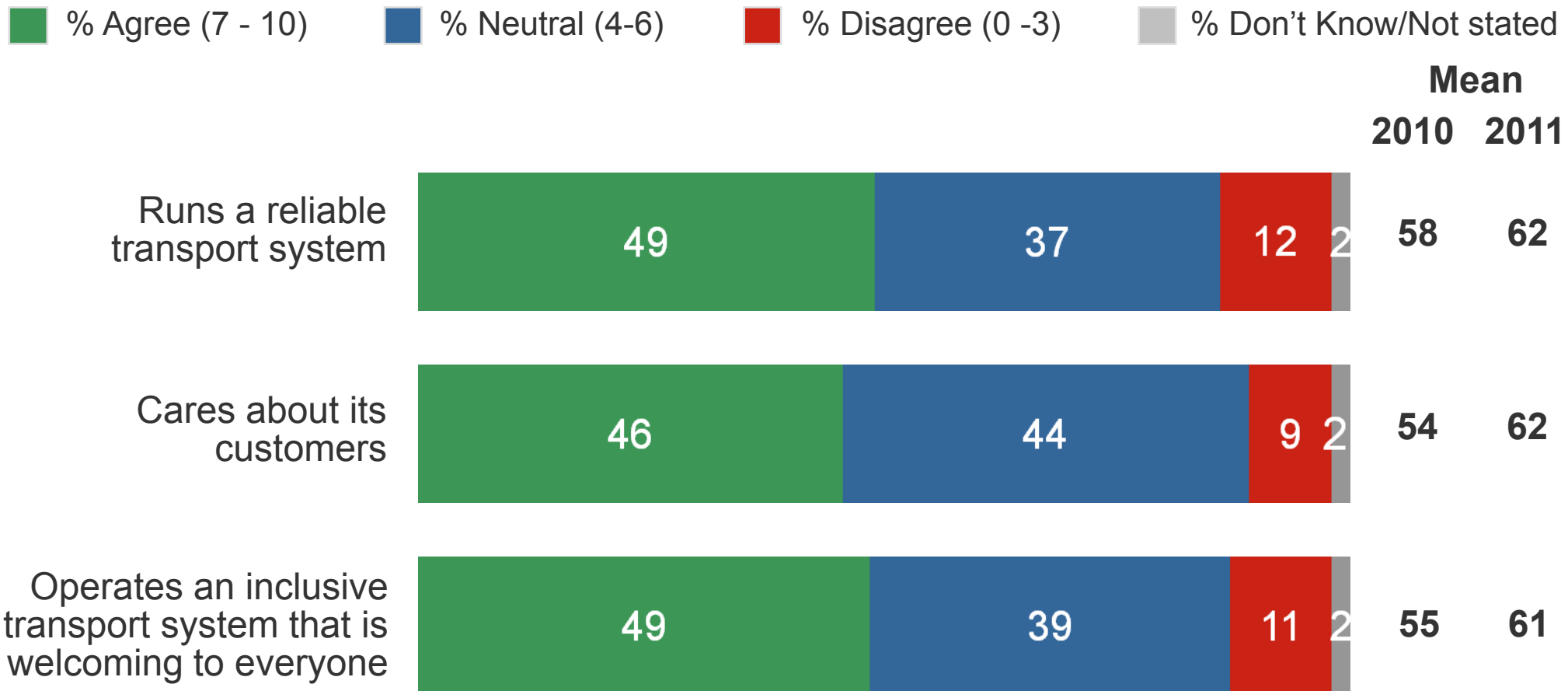
Is improving the
environment on our streets
and public spaces



53 56

Business Objective 5: To dramatically improve the experience of travelling in London

Q Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel Transport for London...



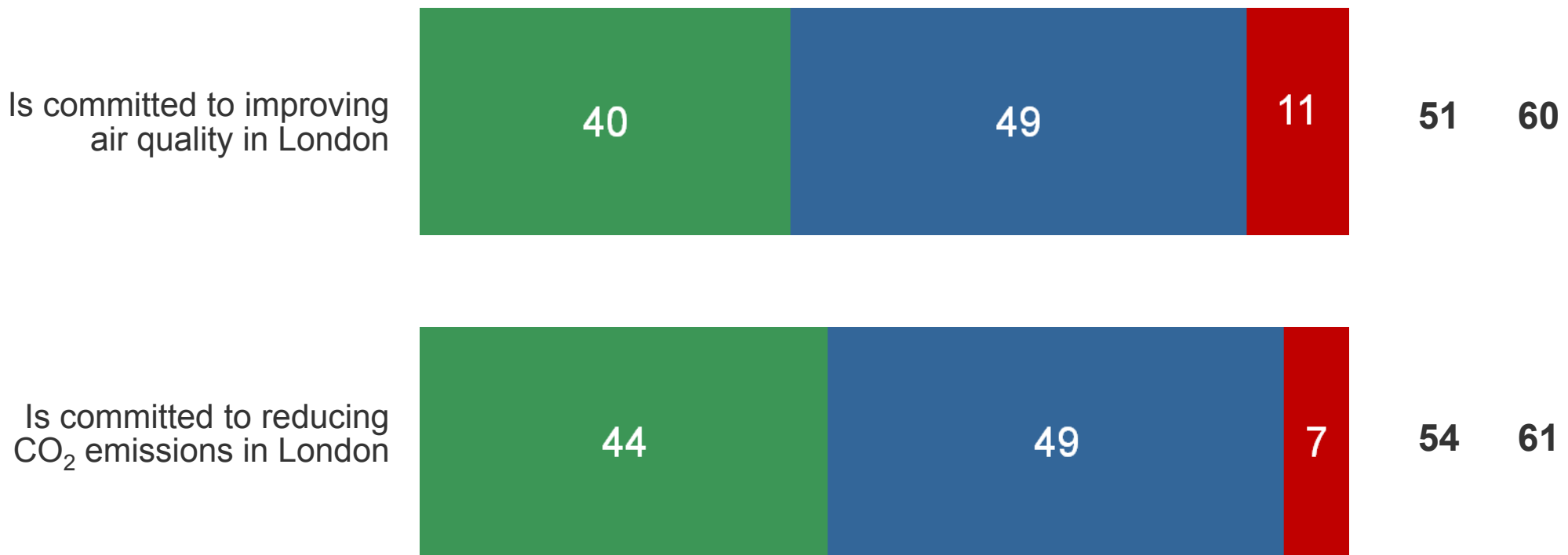
Base: All who know at least a little about Transport for London (57), 2011

Business Objective 6: To minimise transport impacts on the environment

QTfL8 Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel Transport for London...

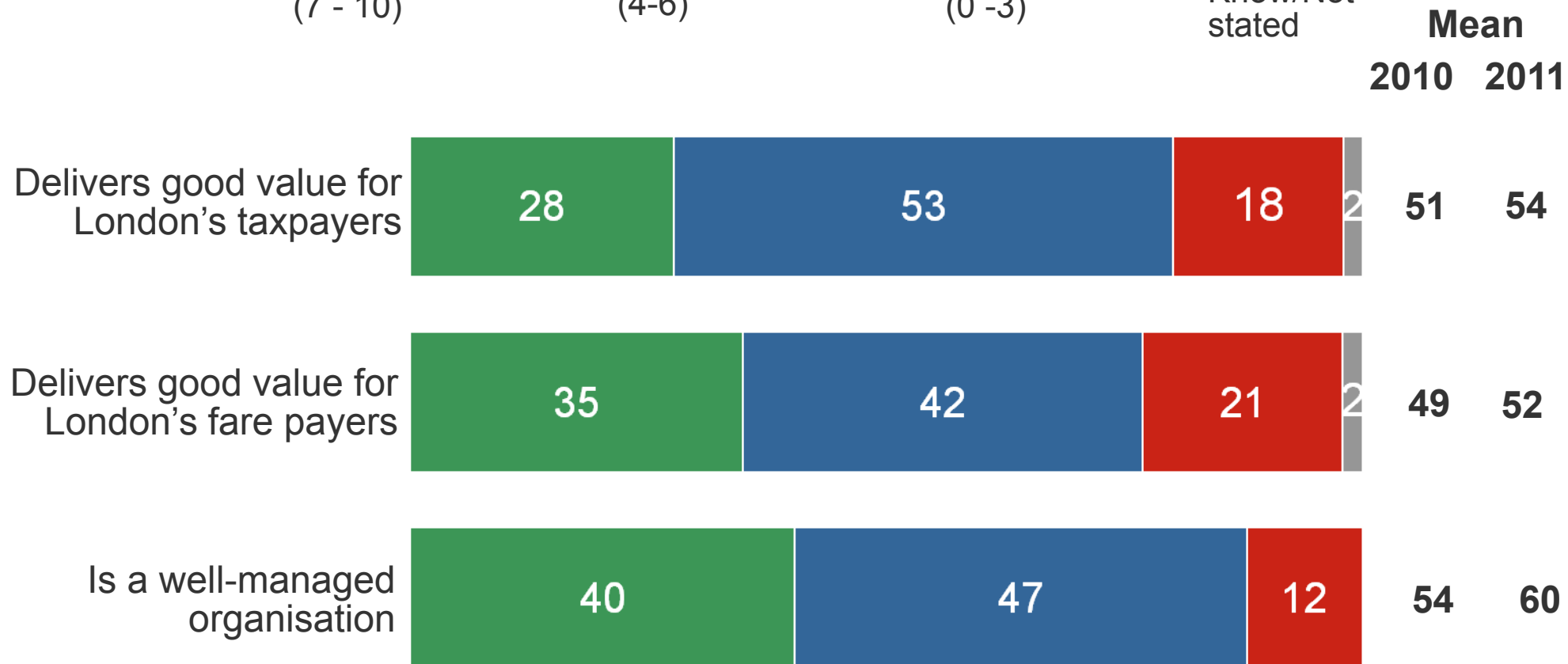
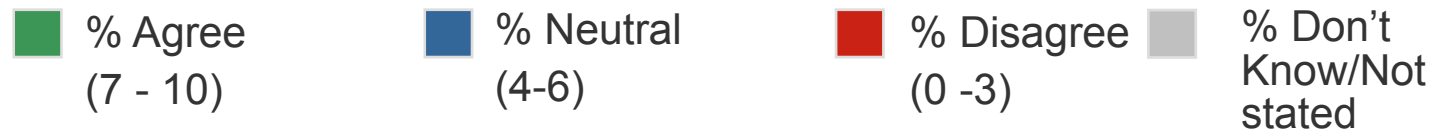
■ % Agree (7 - 10) ■ % Neutral (4-6) ■ % Disagree (0 -3) ■ % Don't Know/Not stated

Mean
2010 2011



Business Objective 7: To ensure value for money

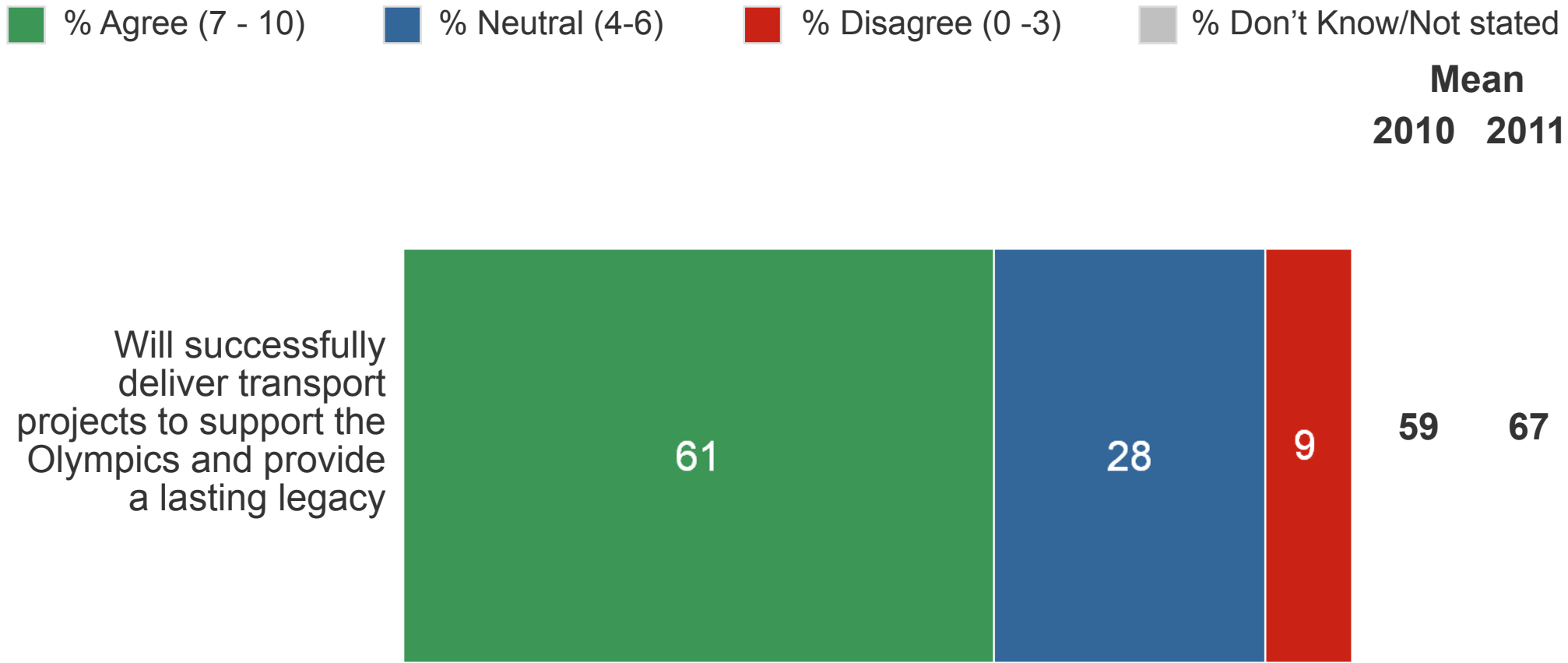
Q Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel Transport for London...



Base: All who know at least a little about Transport for London (57), 2011

Business Objective 8: To deliver London's 2012 transport projects and secure a lasting legacy

Q Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel Transport for London...



London Underground's reputation measures

Summary – Detailed ratings can be found in the London Underground Transport Journalists report

LU's brand measures (1)

Strengths and weaknesses

- 'Modernisation/improvements/investment' and the comprehensive network are the top spontaneous mentions of LU's strengths, with 34% of journalists spontaneously mentioning both these areas. The perception of 'modernisation/improvements/investment' as a strength has seen an increase since last year.
- Frequency and reliability of trains also feature highly as a perceived strengths with just over a quarter of all journalists mentioning these factors.
- Overcrowding and the aging infrastructure are perceived as the main weaknesses with over two thirds (37% and 34% respectively) of all journalists spontaneously mentioning these areas. Most notably there are more mentions of overcrowding as an issue compared to 2010. Mentions of poor industrial relations has also seen a similar increase this year.
- 'Lack of investment/funding/finance' as a weakness has seen a drop of 13 percentage points this year indicating that the increased investment by LU has been acknowledged by journalists. Most notably and tying in with noticed improvements there are also fewer mentions of 'train/stations in need of improvement' compared to 2010

LU's brand measures (2)

Perceptions of service

- The average rating of the **overall level of service** has improved slightly by four points since last year. The proportion of journalists who now give a rating of at least 7 out of 10 on overall service has seen a significant rise since 2010 and now stands at 69%.
- Interestingly and despite improvements in the rating of the overall level of service over two thirds of journalists now consider the service to have stayed the same over the past year (up 9 points since 2010).
- Those who consider the service to have got worse in the last year has steadily increased year on year since 2009, whilst those who think the service to have improved has fallen by 12 percentage points.

Brand metrics

- Most metrics return to form following a dip in 2010.
- Over half (58%) of all journalists agree that LU is **investing to improve the quality of its services** a figure on par with that of last year and some way ahead of the 2007 figure of 46%.
- LU is viewed by approximately half (49% giving a score of at least 7 out of 10) of all journalists as a **world class transport system**. Perceptions on this measure have steadily improved since 2007.

LU brand measures (3)

- Over two thirds (68%) of all journalists consider the Tube as a **fast way to get around London**, a six percentage point increase on last years figure but still behind its peak of 76% in 2008. This is the top performing of all LU's brand metrics in terms of the 7-10 responses closely followed by '**is honest**' with 61%
- Journalists are significantly more positive this year regarding the **reliability** of the LU service with 53% indicating agreement with this metric in comparison to 43% last year, a continuation of the year on year growth experienced since 2007.
- '**Recognises that my time is important to me**' is the worst performing of all the metrics in terms of the 7-10 rating, with one quarter in agreement with this statement, a five percentage point decrease on last years figure. However the percentage of journalists who disagree with this statement has dropped from 21% in 2010 to 14% this year which is a step in the right direction. It should however be noted that this metric still performs better than in 2008 when only 14% of journalists agreed (7-10) with this statement.

LU brand measures (4)


- **'Is ideal for unfamiliar journeys'** and **'is well integrated with other transport services'** have seen little movement since last year with around half (58% and 53% respectively) agreeing with these statements. 59% of all journalists still agree that LU is **'simple to use'** (60% in 2010). Despite this, these metrics are still performing much better than was seen in 2008.
- Journalists are more likely this year to agree that the Tube **'is easily accessible to everyone'** (41% this year compared to 30% in 2010).
- Despite a decline across both safety metrics LU is still performing well in this area. Over half (59%) of all journalists agree that the Underground **'is a safe place to travel without fear of accident'**. However this metric has seen a year on year decline since its peak of 80% in 2009, this indicates the importance of raising the profile of LU's safety record. **'Is a safe way to travel without fear of crime'** has fared better (56%) with only a three percentage point decrease on last years figure.
- The staff metrics may be an area which could benefit from increased focus as they are among the lowest performing of all metrics. Almost half (47%) still consider LU staff to be **professional**, however, only a third (34%) consider them to be **friendly and helpful**. Ratings on these measures have not changed significantly over the past few years.

LU brand measures (5)

- Journalists are significantly more likely this year to agree that LU **'is a well managed organisation'** (49% this year compared to 27% in 2010). The effective **management of works and closures** has also seen a sharp rise this year with more journalists agreeing with this statement. Journalists who write in the Daily/Sunday press and periodicals are more inclined to agree with this statement than in 2010.
- LU is increasingly seen as **communicating openly about future plans** with over half (51%) of all journalists agreeing with this statement compared to a third in 2010.
- Almost three in four of LU's key journalists perceive this to be the case indicating that communications are being delivered through the correct channels.
- Perception of the **fair treatment of employees** has seen a twofold increase on last years figure with 44% now agreeing with this statement. This may be linked to the way LU has managed the strike actions.
- **Honesty** has seen an impressive growth this year with 61% now agreeing with this statement compared to 29% in 2010. This represents the highest rating for this metric over the last five years and is some way ahead of the previous peak of 39% in 2007.

After last years dip, most metrics have returned to 2009 levels

Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel that LU...

	Mean Score					
	2006	2007	2008	2009	2010	2011
 Up 5pts or more from 2010						
Is a safe way to travel without fear of accident	68	72	76	78	69	75
Is a fast way to get around London	72	73	73	71	65	71
Is investing to improve the quality of its services	63	66	67	70	68	68
Is simple to use	66	69	66	67	66	68
Is a safe way to travel without fear of crime	53	59	63	70	65	67
Is honest	56	60	58	60	56	67
Is ideal for unfamiliar journeys	61	64	65	66	64	66
Is well integrated with other transport services	59	62	60	65	62	63
Has professional staff	57	58	58	61	60	61
Is reliable	50	55	57	59	59	61

Base: All Transport Journalists who know at least a little about London Underground (59) 2011, (63) 2010

The increase of managing works and closures effectively indicates a successful year of improvement

Using a scale of 0 to 10 where 0 means that you strongly disagree and 10 that you strongly agree, to what extent do you feel that LU...

Mean Score

■ Up 5pts or more from 2010

	2006	2007	2008	2009	2010	2011
Treats its employees fairly	52	56	57	57	54	63
Communicates openly about its plans for the future	54	58	55	56	56	61
Is a well managed organisation	55	59	55	59	55	60
Is a world-class transport service	51	56	55	61	54	60
Is easily accessible to everyone	46	57	56	54	49	58
Cares about its customers	50	54	53	56	55	56
Recognises that my time is important to me	47	49	47	55	51	55
Has friendly and helpful staff	51	52	53	58	54	54
Managing works and closures	-	-	-	-	46	53
Is an enjoyable way of getting about	41	43	43	53	45	48

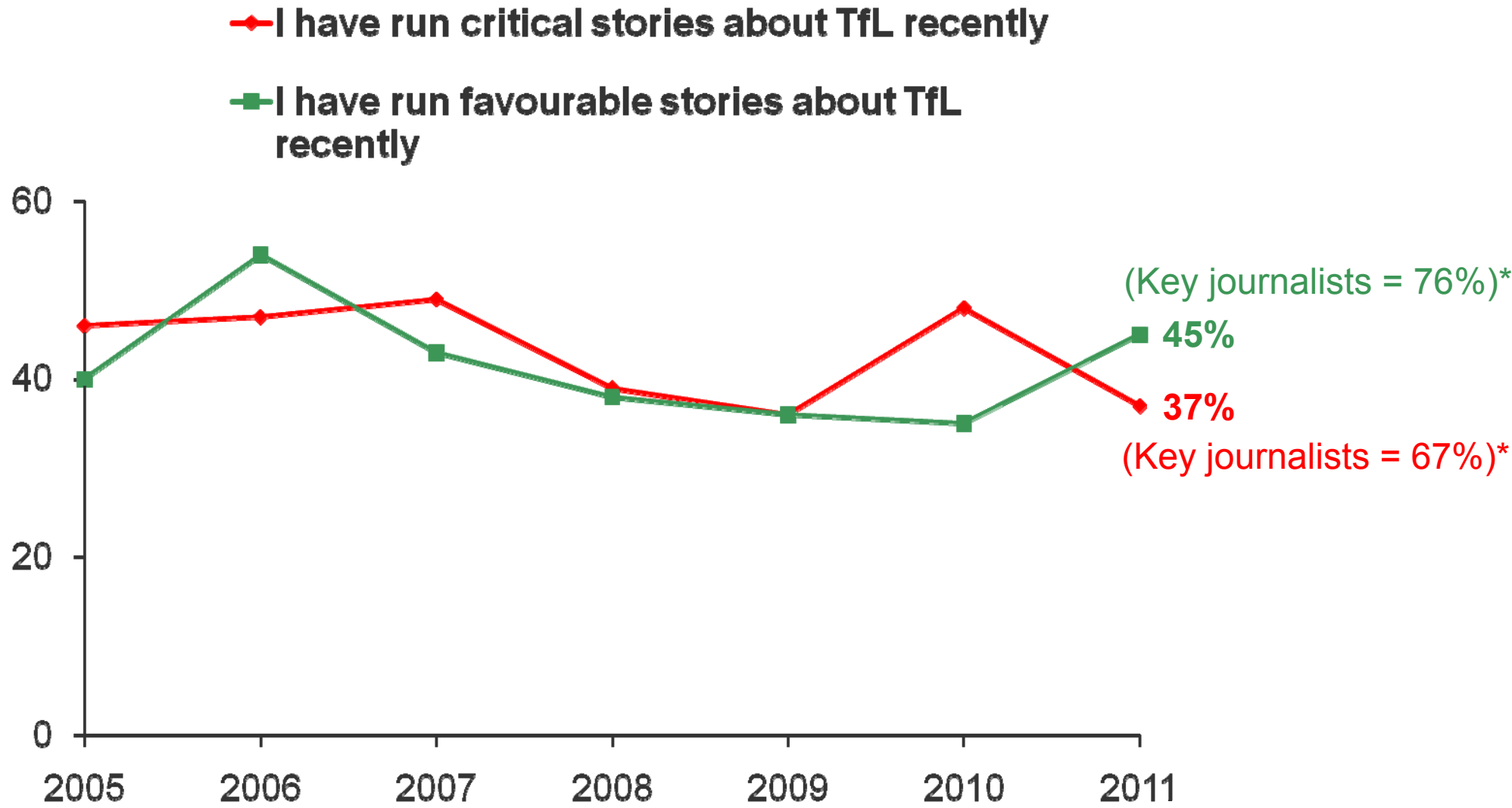
Base: All Transport Journalists who know at least a little about London Underground (59) 2011, (63) 2010

Press Relations and sources of information: Main findings

Press relations and sources of information

- Ratings of TfL's press relations among all transport journalists have not changed in the past year. More than two fifths rate it as good, as in 2010. Key journalists are much more positive, with close to nine in ten (86%) rating press relations with TfL as good, continuing the upward trend seen in recent years
- Ratings for Eurostar and Network Rail have not changed since 2010, while DfT's press relations have improved and are now on a par with TfL, while those for BA have seen a decline
- Increasingly few, just one in twenty (5%), describe TfL's press relations as poor – far less than Network Rail and DfT
- There continues to be high praise for how TfL provides good quality news items, with TfL being ranked the fourth best company (of 48 organisations) at doing this. As last year, TfL is considered to be amongst the top twelve organisations for all four aspects of press relations asked about
- Having improved over the previous two years, all four press relations aspects have remained constant between 2010 and 2011, consolidating the gains made in recent years. Thus, the proportion who rate TfL as good at 'providing a speedy response' and 'providing good quality news stories' remain at record high levels
- Following a steady decline since 2006 in the proportion of journalists saying they have run favourable stories about TfL, this trend has been reversed in 2011. The proportion of those saying they have run favourable stories is now at the highest level since 2006

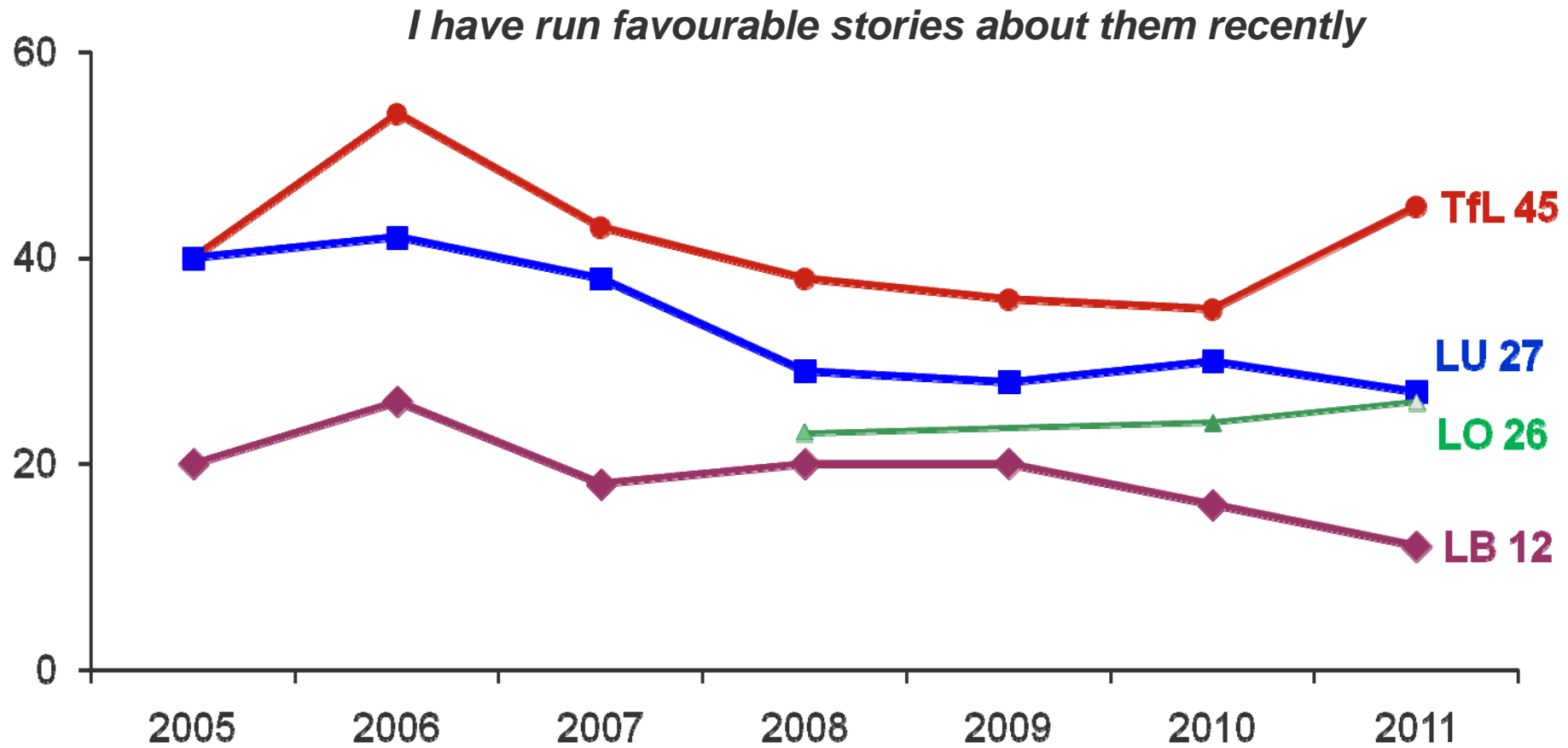
Journalists are more likely to say they have run favourable stories on TfL recently



* WARNING: SMALL BASE SIZE

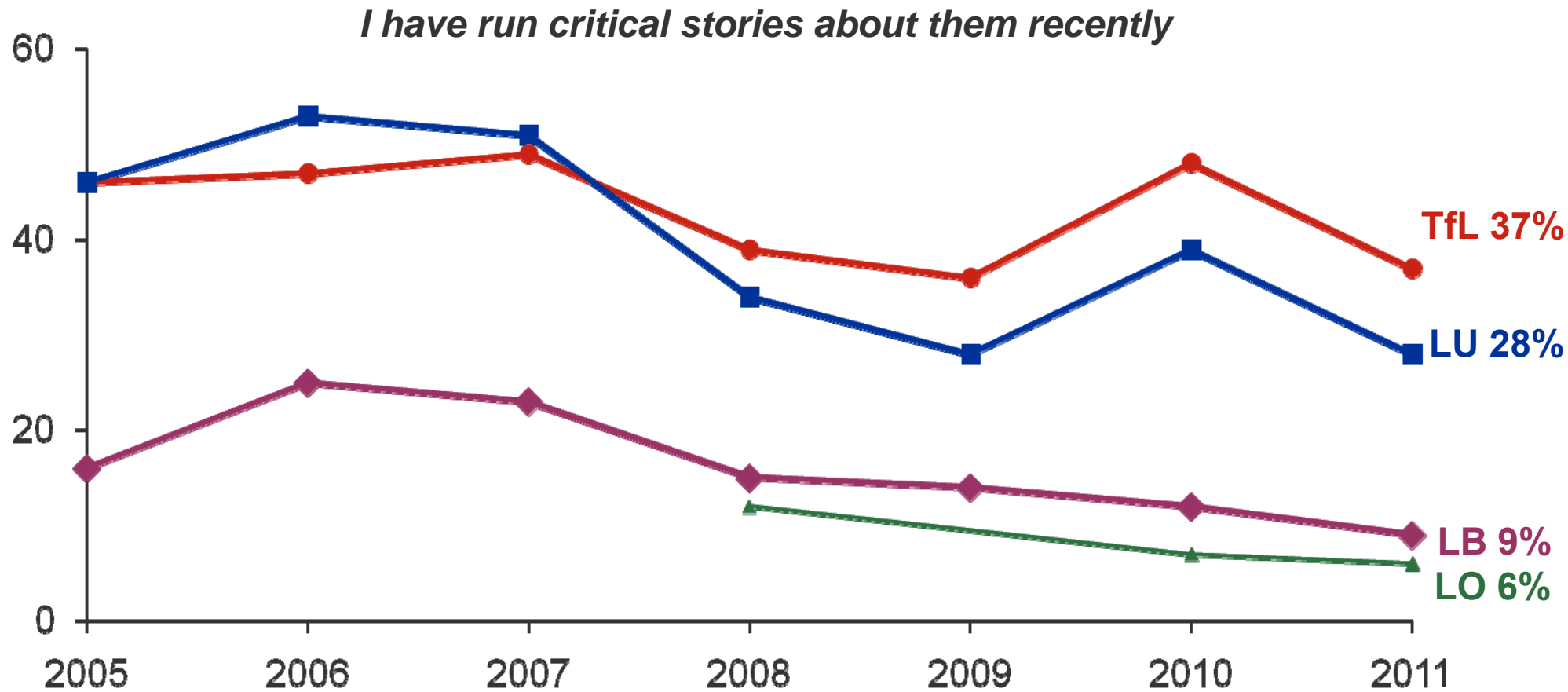
Base: All Transport Journalists who have at least heard of TfL (67), 2011

Journalists remain more likely to write favourable stories about TfL than LU, LO or LB...



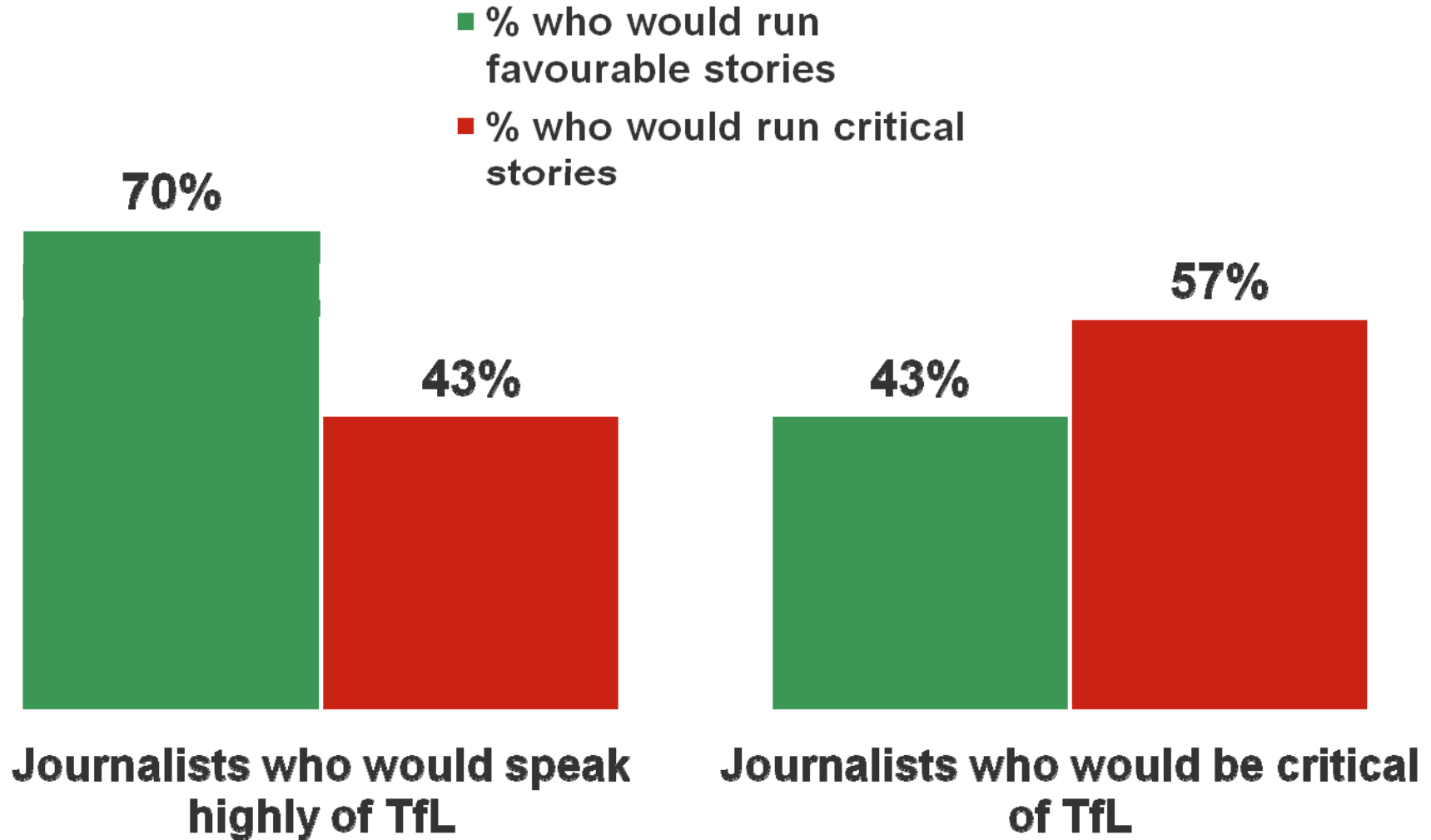
Base: All Transport Journalists who have at least heard of each organisation, 2011

...but also remain more likely to run critical stories about TfL, although the proportion of critical stories has fallen



Base: All Transport Journalists who have at least heard of each organisation, 2011

Advocacy influences the likelihood of running favourable or critical stories about TfL



* WARNING: SMALL BASE SIZES

Base: Journalists who would speak highly of TfL (23), Journalists who would be critical of TfL (7), 2011

As in 2009, more than two-fifths of journalists rate TfL's press communications as good

How do you rate TfL's press relations?

Very good
Fairly poor

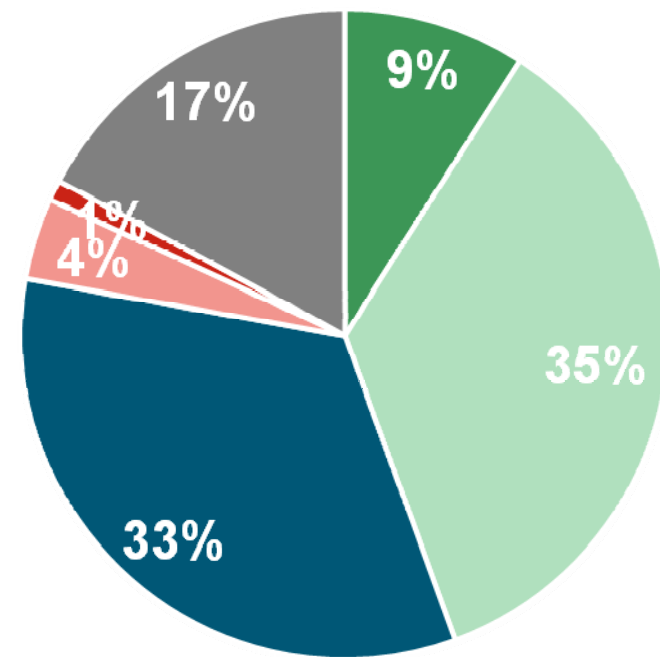
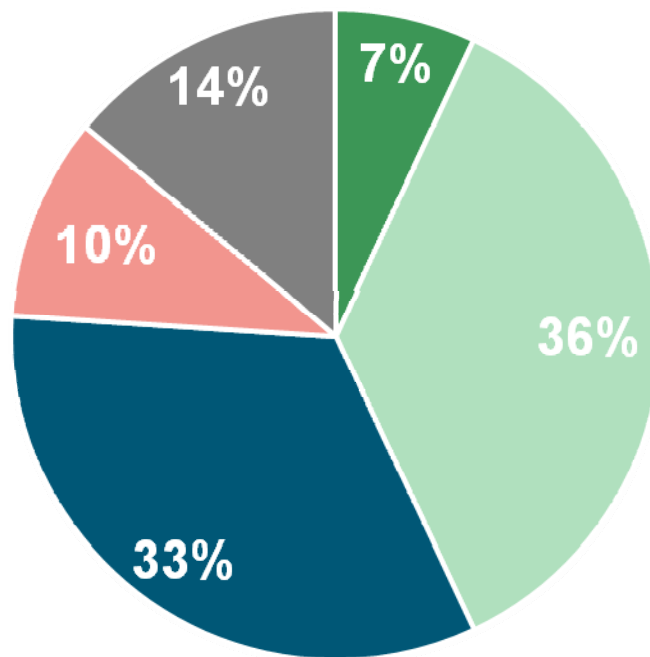
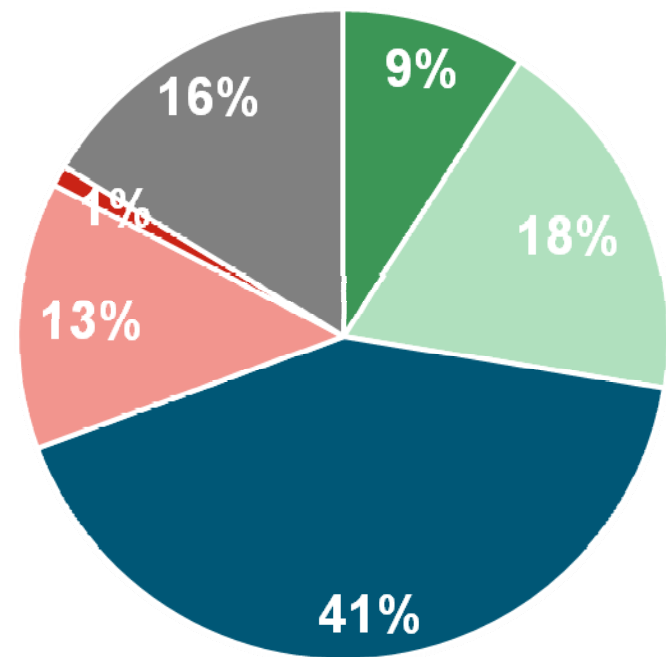
Fairly good
Very poor

Neither
Don't know

2009 - All

2010 - All

2011 - All



Base: All Transport Journalists (69), 2011; (70), 2010; (68), 2009

TfL's key journalists are increasingly complimentary about press relations

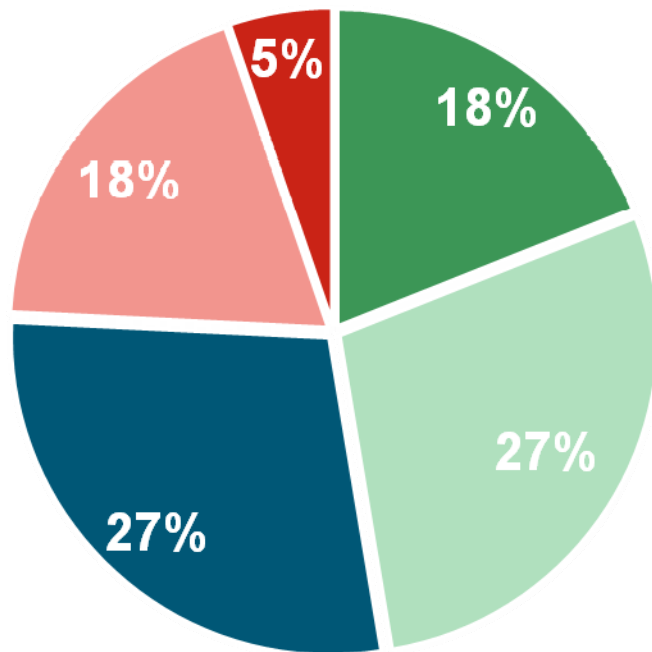
How do you rate TfL's press relations?

Very good
Fairly poor

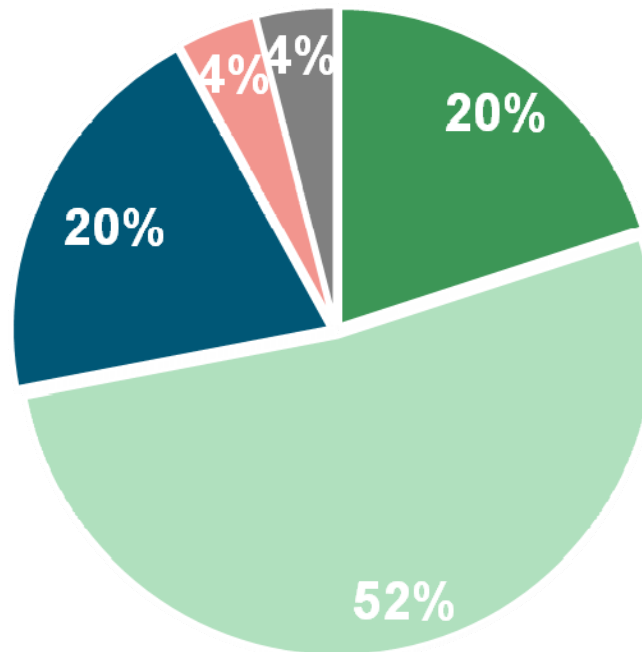
Fairly good
Very poor

Neither
Don't know

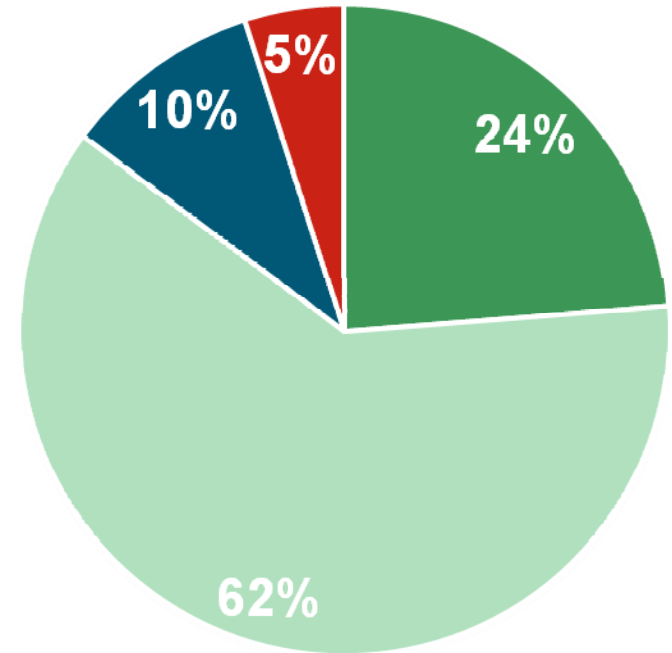
2009 – Key Journalists*



2010 – Key Journalists*



2011 – Key Journalists*

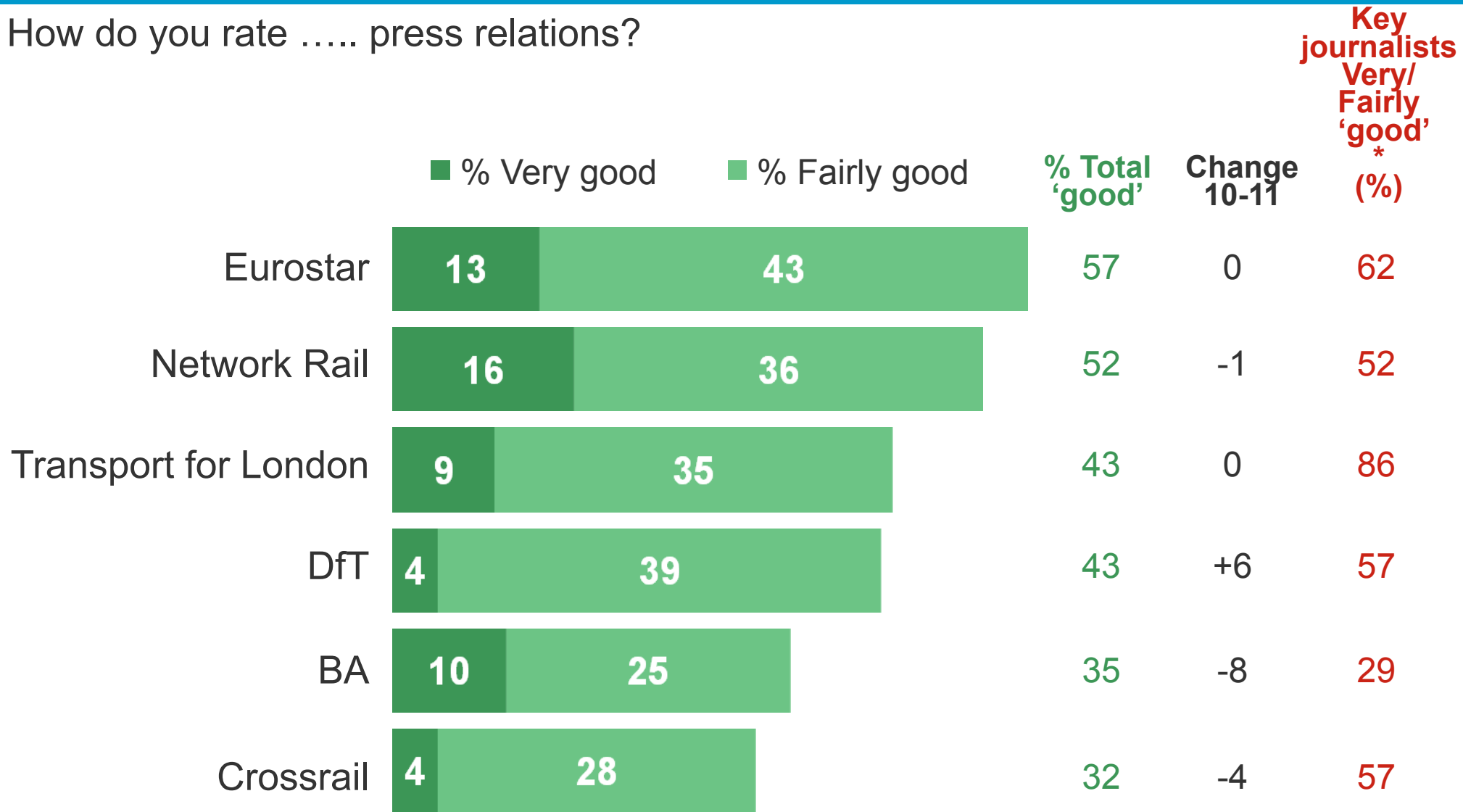


* WARNING: SMALL BASE SIZE

Base: All Key Transport Journalists (21), 2011; (25), 2010; (22), 2009

No significant change in the 'good' scores for TfL's press relations since last year

How do you rate press relations?

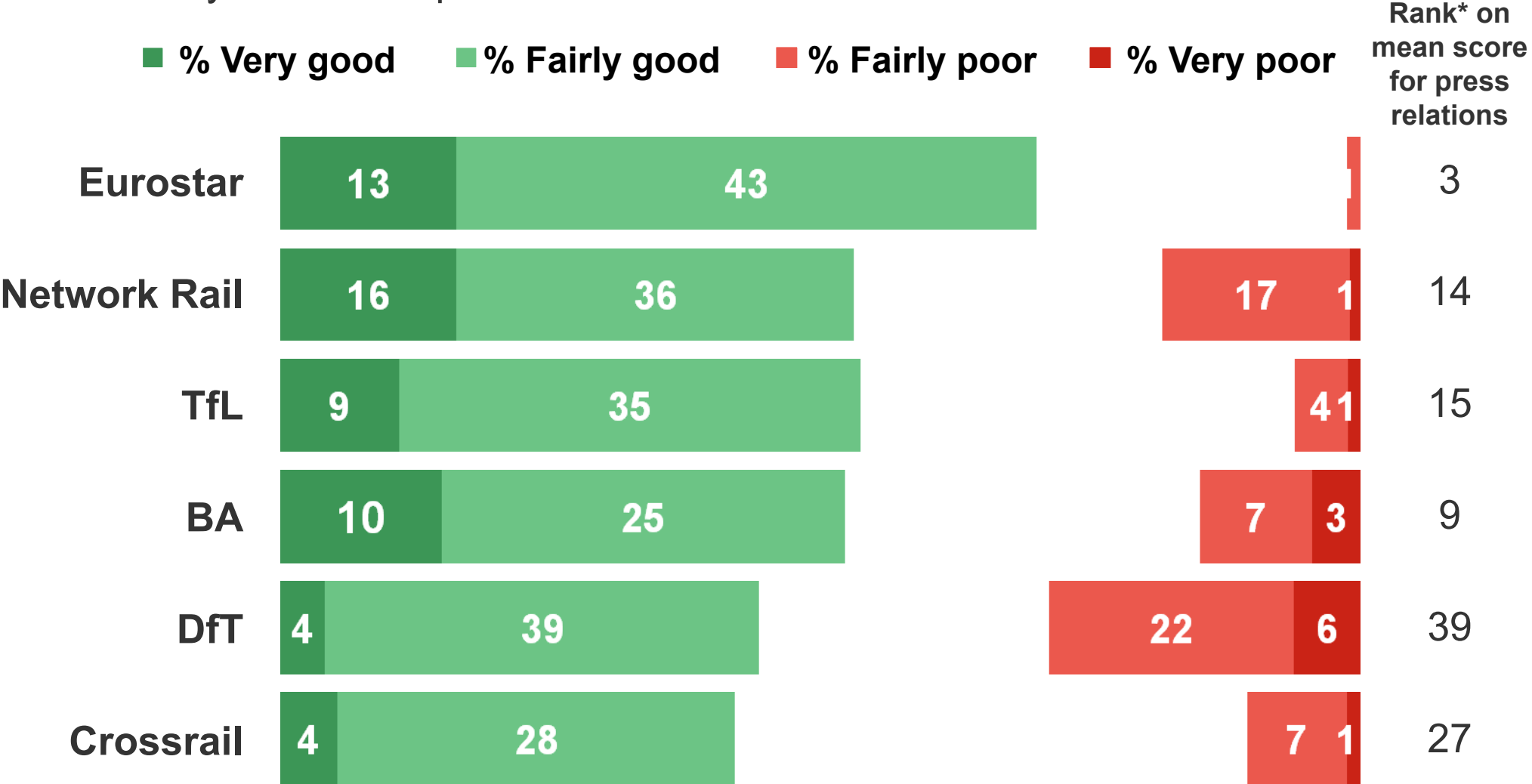


* WARNING: SMALL BASE SIZE

Base: All Transport Journalists (69), 2011

Just one in twenty describe TfL's press relations as poor

How do you rate press relations?

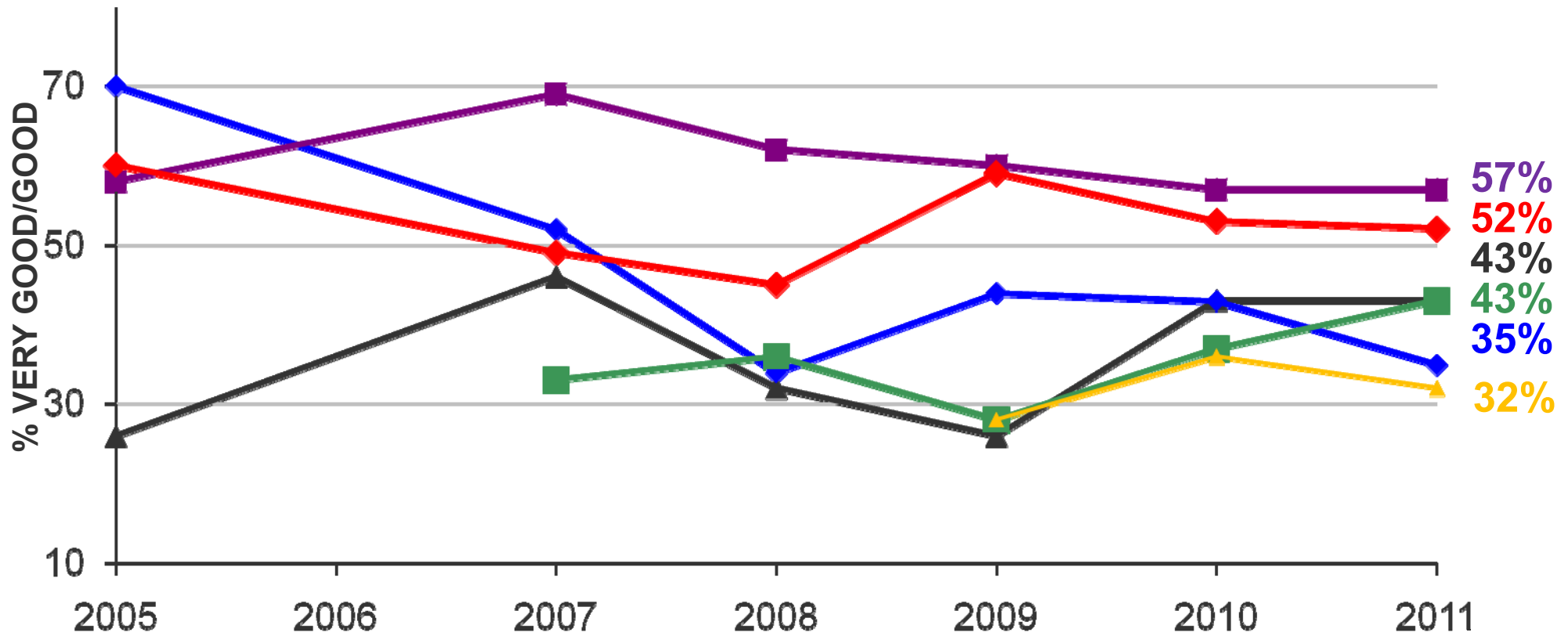


** 2011 rank position out of 48 organisations

Base: All Transport Journalists (69), 2011

Ratings of TfL's press relations are consistent with 2010. Ratings for BA have fallen dramatically since 2005

▲ TfL (43%) ◆ BA (35%) ■ DfT (43%)
 ■ Eurostar (57%) ◆ Network Rail (52%) ▲ Crossrail (32%)



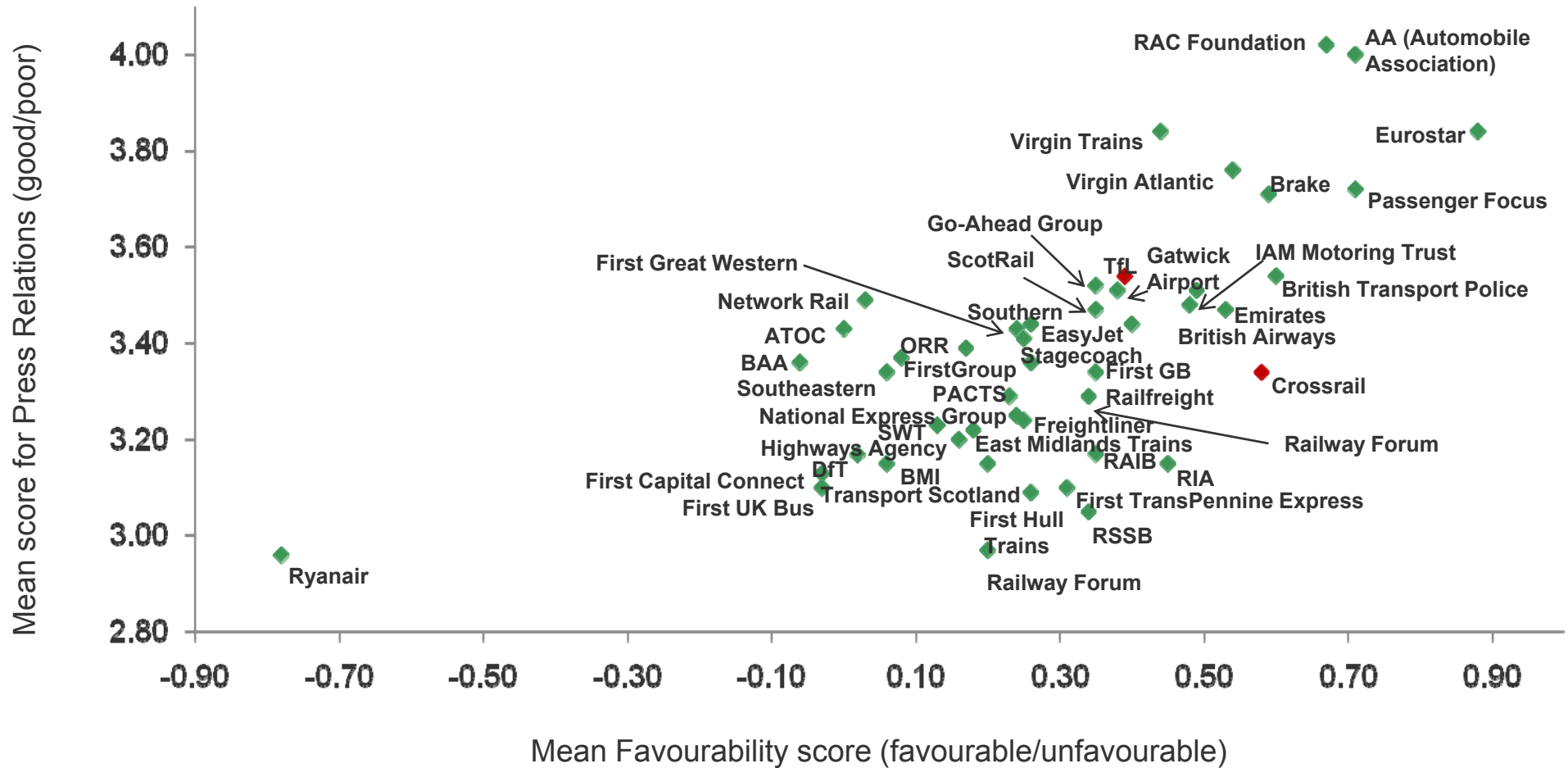
Note: No measures for 2006

Base: All Transport Journalists (69) 2011, (68) 2010, (76) 2008, (61) 2007

Reputation profile

- The following chart shows the relationship between ratings of press relations and favourability in the context of a range of other organisations
- The position of each is calculated from average scores of press ratings (by applying a score of five to each 'very good' response, and so on through to a score of one to each 'very poor' response) and favourability (by applying a score of +2 to each 'very favourable' response, and so on through to a score of -2 applied to each 'very unfavourable' response)
- Crossrail, for example, has a high favourable rating relative to its press relations rating, but Ryanair suffers from low favourability relative to its press relations rating
- Compared with other organisations with similar average ratings of favourability, TfL is relatively highly rated in terms of its press relations, as it was in 2010

Rating of press relations and favourability for all organisations



Base: All respondent who have at least heard of each company 2011

TfL's Press relations – positive comments

(Very good) *“TfL makes its **executives widely available**, it is very responsive very quickly to your queries, it knows its network back to front so they are able to respond to factual enquiries very quickly. It helps that it has a lot of press officers, so it has a lot of expertise. It is a very proactive press office”* Non-attributable

(Very good) *“I have had a number of interviews recently and they have all been rather good. I have been invited up to their main offices in London, **spoken to a main board director, shown around their facilities**, taken out onto site, seen things in action. They are all the things you want really, which is good, and as a result I am sure they are pleased with the coverage they get. They are quite **open and friendly on the whole**”* Non-attributable

(Fairly good) *“On the occasions we needed them they get back to us in an **efficient timely manner**, for an organisation that large, they got back to us within a day”*
Adrian Pearson, The Journal
(Newcastle)

(Fairly good) *“Whenever I have had to contact them over any issues that are being faced by passengers from this area I have always found it fairly easy to (a) get through to them and (b) to get a response to my queries. The information they have given has been to the point and **easily useable and understandable**. They are one of the organisations who come back pretty quickly [even] if you have a query they can't answer”*
Non-attributable

TfL's Press relations – positive comments

(Very good) “They are **always very keen to talk to you** and very forthcoming with information. You can't ask for more than that. They are very happy to chat, **very accessible and very forthcoming**” Non-attributable

(Fairly good) “They send out quite a lot of press releases, there is **good availability of stories**. There is a good media library to get images from” Katie Silvester, Rail Professional

(Fairly good) “Because I get quite **a lot of contact** from them, particularly on the London Overground side, arranging site visits, arranging meetings with senior managers” James Abbott, Modern Railways

(Fairly good) “I normally have daily dealings with TfL so I **speak to them frequently on a wide range of subjects** and they make an effort to respond pretty fully to my queries, so they do **take my queries seriously** and make an effort to respond as fully as they can. And in general the press officers seems to know what they're talking about as well or will find an answer which correlates to the question being asked” Ross Lydall, The Evening Standard

TfL's Press relations – negative comments

(Very poor) *“They rarely get back to when they say they will, they rarely put me through to the right person. They are alright at sending out press releases but beyond that there is no real relationship, unless you get hold of the Head of News who is the only one that seems confident of being able to speak to a journalist”* Alexandra Wynne,
New Civil Engineer

(Fairly poor) *“I hardly ever hear from them and I find it quite difficult to actually know who to go and talk to”*
Chris Jackson, Railway Gazette
International

(Very poor) *“You can never get a straight answer out of them. You can never get, and I mean never, get an immediate answer out of them. The only reply you will get all the time is “We will come back to you”, this can take a number of hours. Some questions are then answered the following day despite repeated requests for an answer and I speak knowing that this applies to a number of other journalists I work with from different media organisations. When I challenge this, why the horrendous delay, a lot of the people working in the TfL press office do not have a press background at all, and sometimes I believe they don't have an industry background at all. They are unable to answer questions, there is a policy of not answering any questions off the cuff”* Non-attributable

TfL ranked fourth for providing good quality news and relatively well ranked for all other aspects

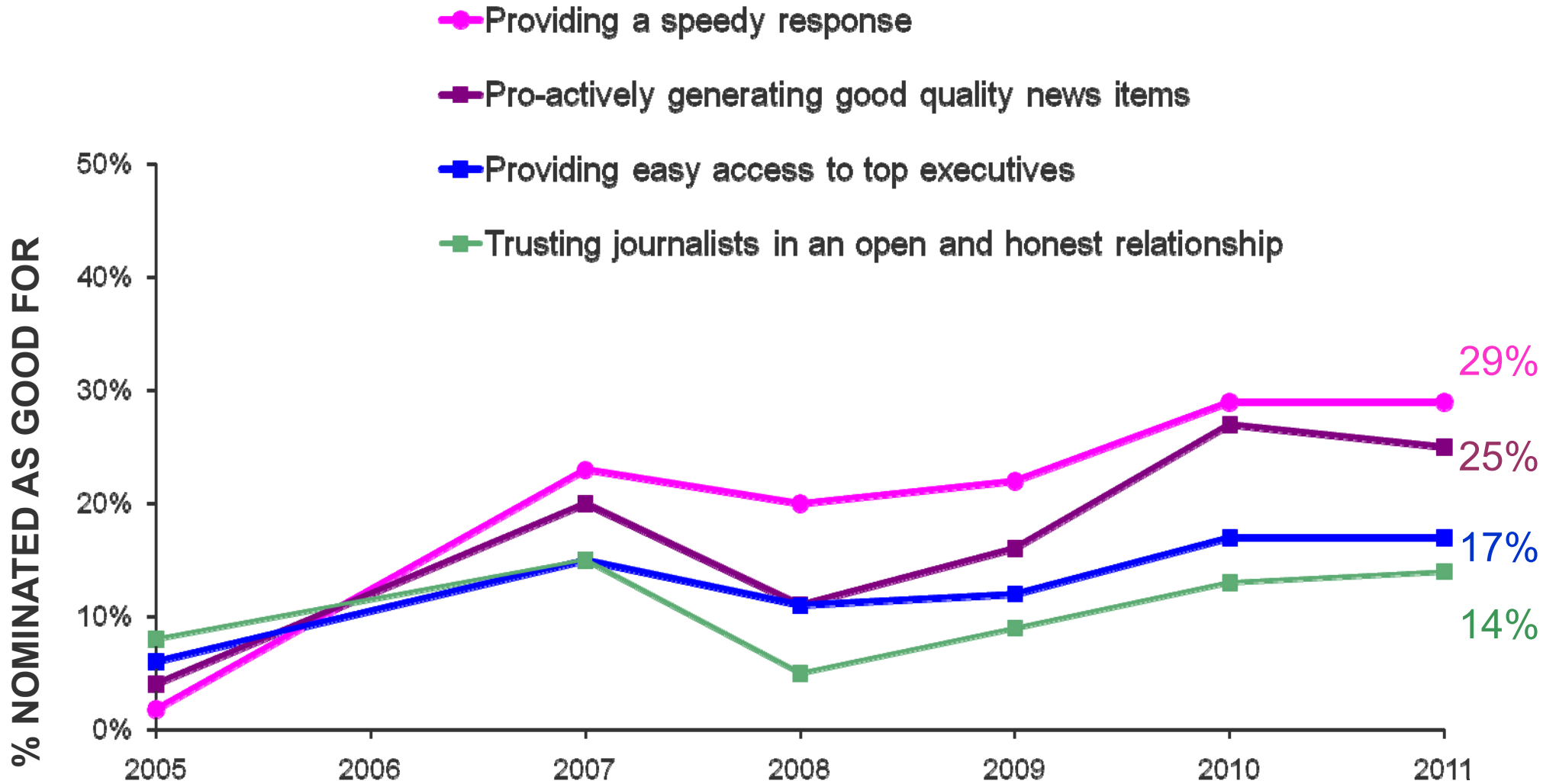
Nominated as good for:	TfL (All journalists)	*TfL (Key journalists)	All journalists		
			Rank**	% point change from 2010	% point difference from Max
Providing a speedy response	29%	67%	7	0	-22
Pro-actively providing good quality news items of genuine interest	25%	48%	4	-2	-18
Providing easy access to top executives	17%	33%	10	0	-15
Trusting journalists in an open and honest relationship	14%	33%	12	+1	-16

* WARNING: SMALL BASE SIZE

** 2011 rank position out of 48 organisations

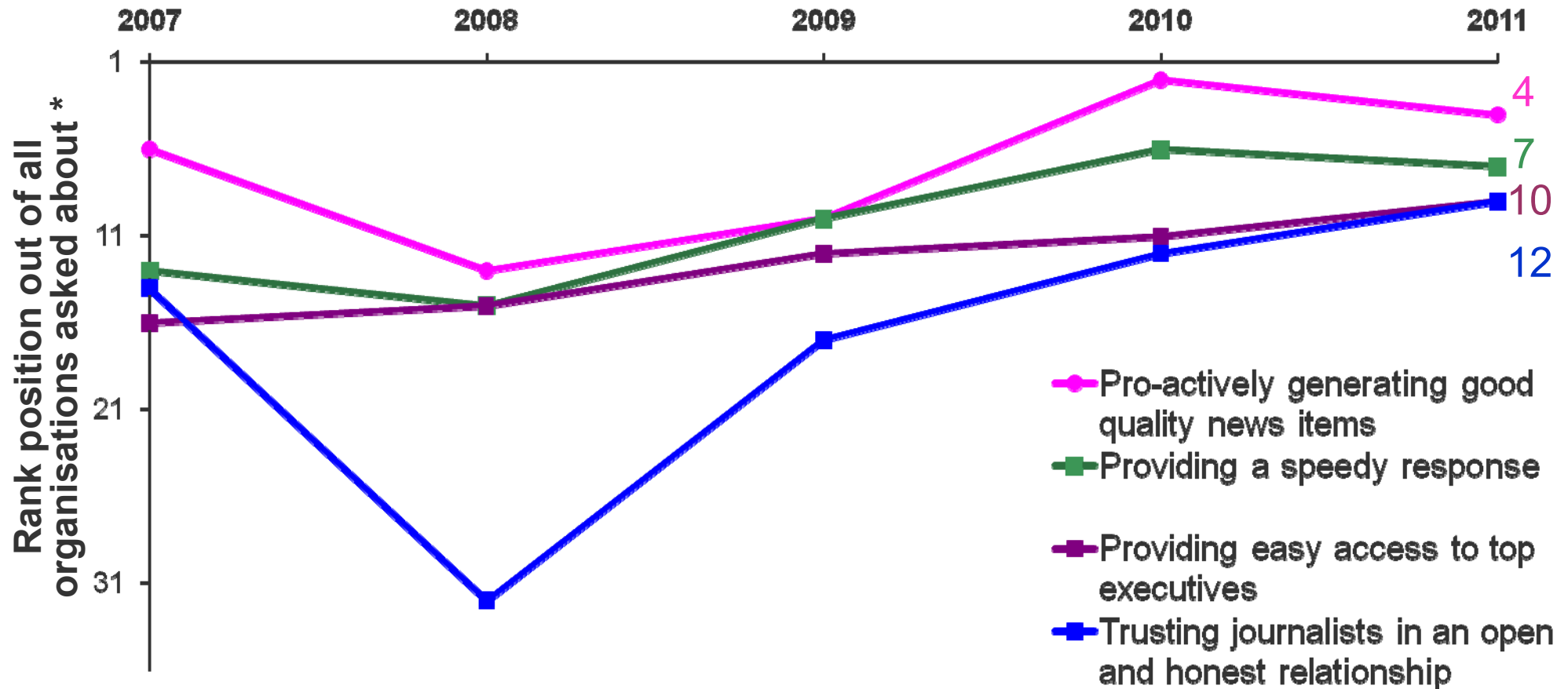
Base: All respondents (69), Key Journalists (21), 2011

Little change from 2010, matching the highest ever ratings for speed of response and access to top executives



Base: All Transport Journalists (69), 2011

TfL's press relations are highly ranked for all measured aspects, maintaining the gains made in recent years



*2011 – 49 organisations measured; 2010 - 41 organisations measured; 2009 - 44 organisations measured; 2008 - 44 organisations measured; 2007 - 39 organisations measured

Base: All Transport Journalists (69), 2011

As before, most journalists are unable to think of a way to improve TfL's website. The most common suggestion is to improve navigation

Do you have any suggestions on how TfL can improve their website?

Caution: small base

A bit cumbersome/not easy to navigate

48%

Make it more user friendly

14%

More/updated images/ photos

14%

It needs to improve/ update its information

10%

More information/updates on their service

10%

Base: All Transport Journalists who have suggestions for TfL's website(21) 2011

How TfL can improve website - comments

“I find it very difficult to find anything useful on it. It is either not there or I can't find it”

Chris Jackson, Railway Gazette International

“Make the navigation slightly easier, it's a bit tricky to find their press releases and news” Non-attributable

“They can ditch the whole thing and rebuild it from the ground up! The current website achieves a great deal of things and does them as well as it can within the framework it has [but] is now starting to show its age. A good proportion of Londoners do use it a lot and, therefore, are familiar with it. But if a visitor to the capital wants to know what is going on and why the Tube isn't working, they are going to be a bit flummoxed by the TfL website”

Gareth Edwards, London Reconnections

“Making it more so that if you're travelling from other parts of the country it's more accessible and joined up being able to plan your journey from further than in and around London and the home counties”

Non-attributable

“It is not particularly easy to navigate. My impression of it is that they could have documents that they produce in a much more legible and accessible arrangement...I suspect there is quite a lot they don't put on their website as well, so it could be more comprehensive”

Non-attributable

Most useful sources of information continue to be press releases, followed by interviews and PR officers

Which four or five ways of getting information about transport and related issues would you say are most useful to you in your work? *Top ten mentions*

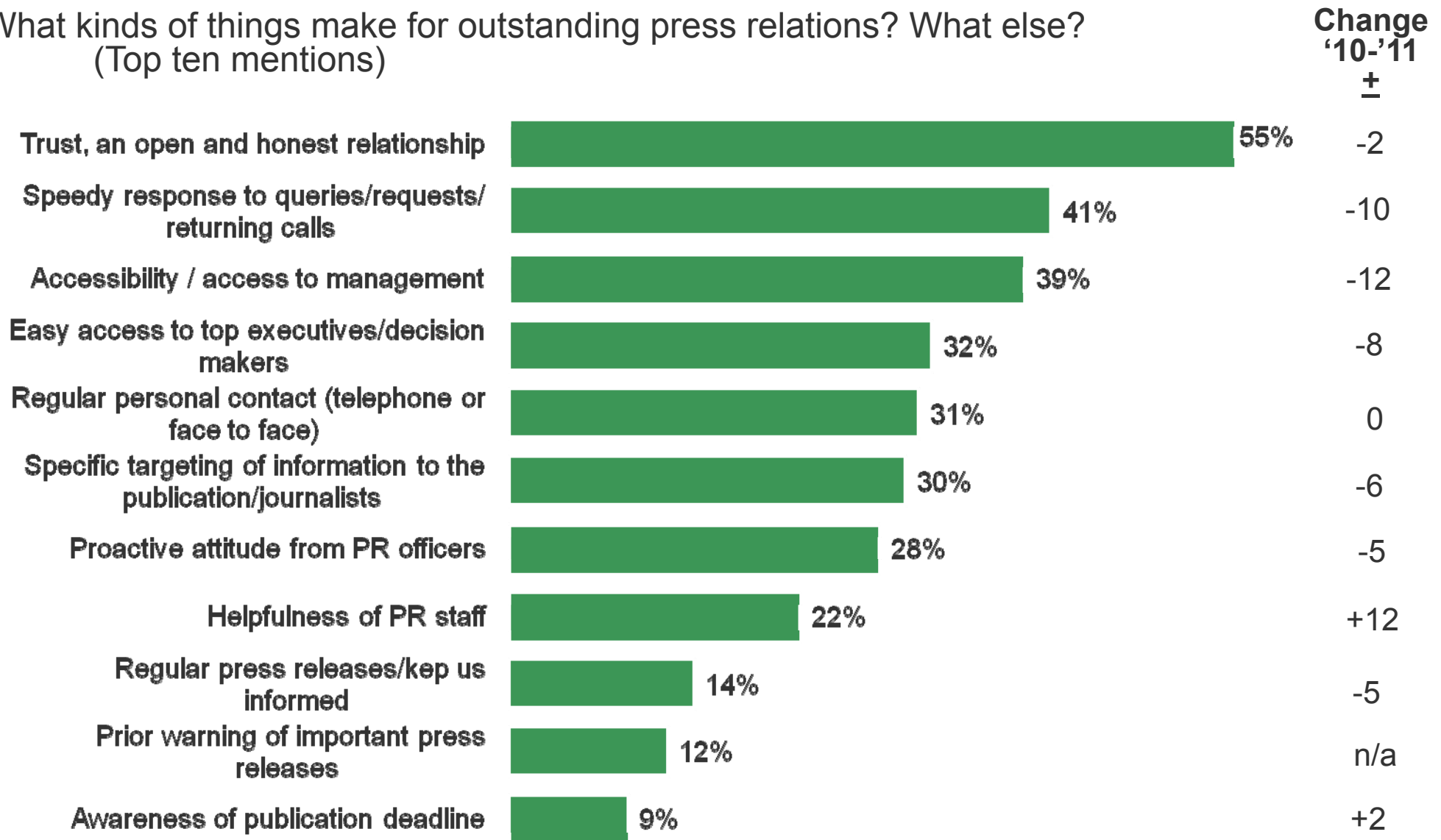
Change
'10-'11



Base: All Transport Journalists (69), 2011

Trust, speed of response and accessibility are key for outstanding press relations

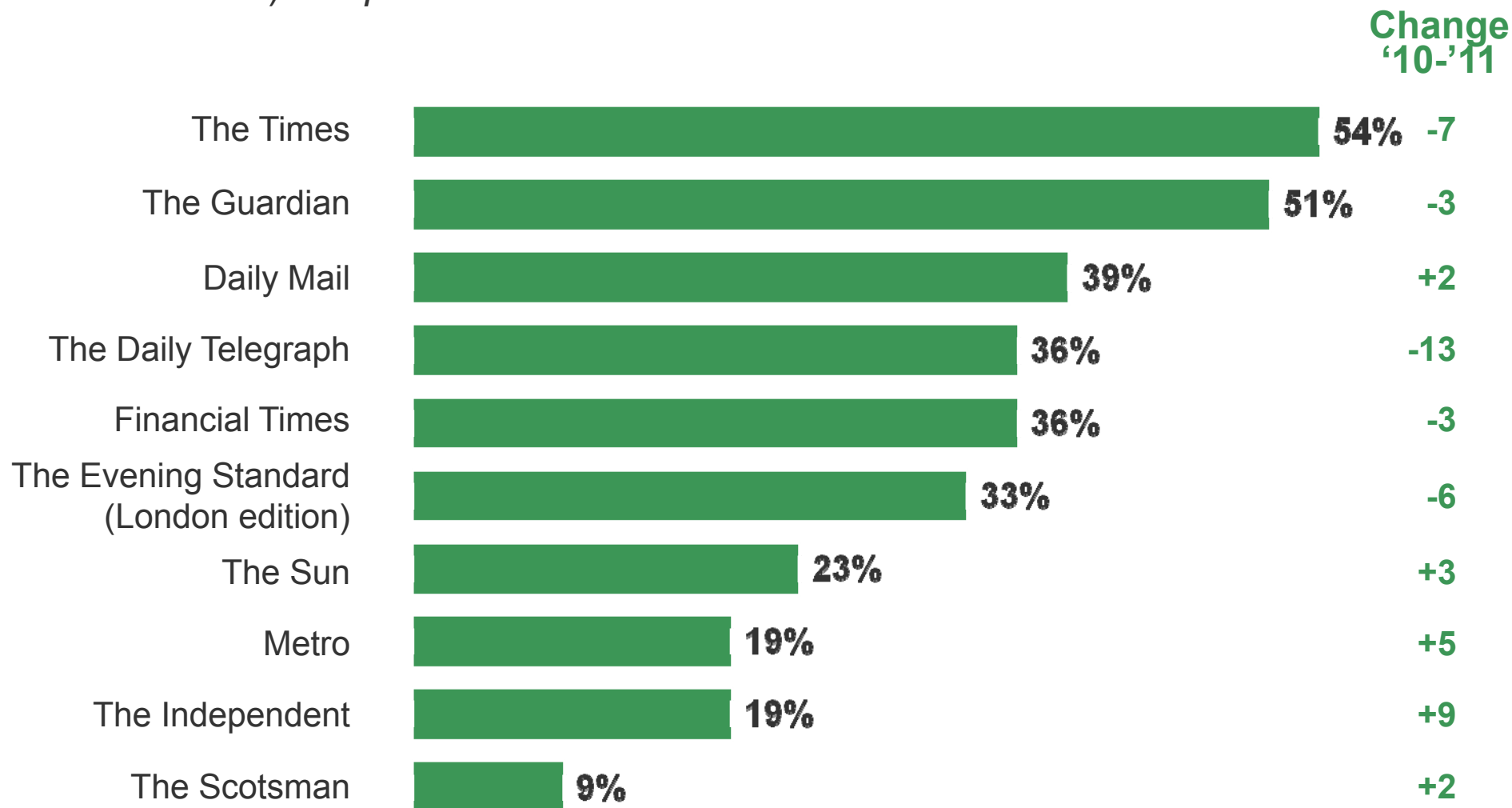
What kinds of things make for outstanding press relations? What else?
(Top ten mentions)



Base: All Transport Journalists (69), 2011

Most read daily publications amongst Transport Journalists are the Times, Guardian and Daily Mail

Which of these daily publications, if any, do you read regularly (at least 3 issues out of 4)? *Top ten mentions*

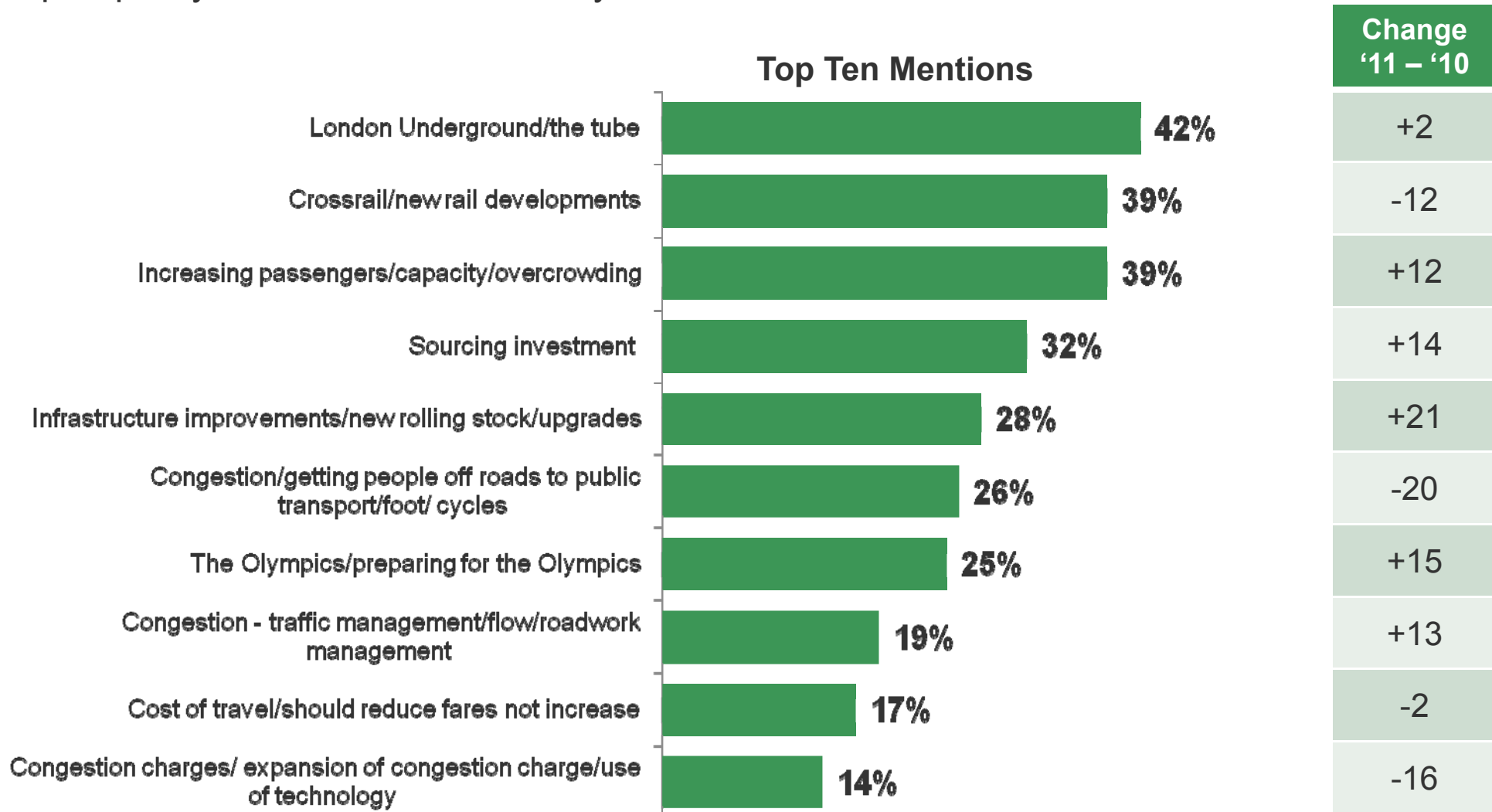


Base: All Transport Journalists (69), 2011

Attitudes to transport policy

The Tube remains London's biggest policy issue, but increased mentions of infrastructure, investment, overcrowding and the Olympics this year

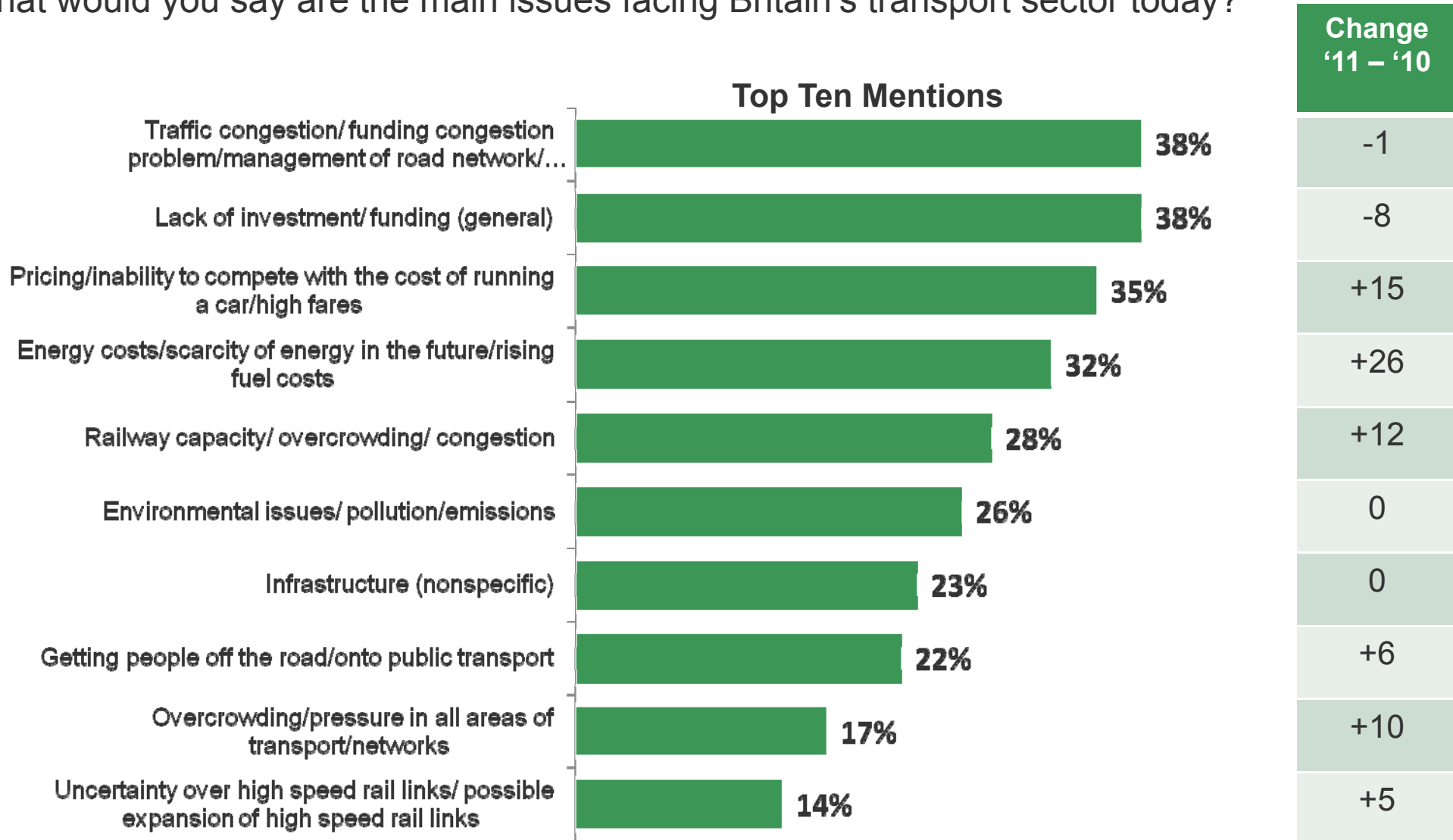
Now thinking about London in general, what do you consider to be the biggest transport policy issues which it currently faces?



Base: All Transport Journalists (69), 2011

Pricing and energy costs have seen a sharp increase as key issues this year

What would you say are the main issues facing Britain's transport sector today?

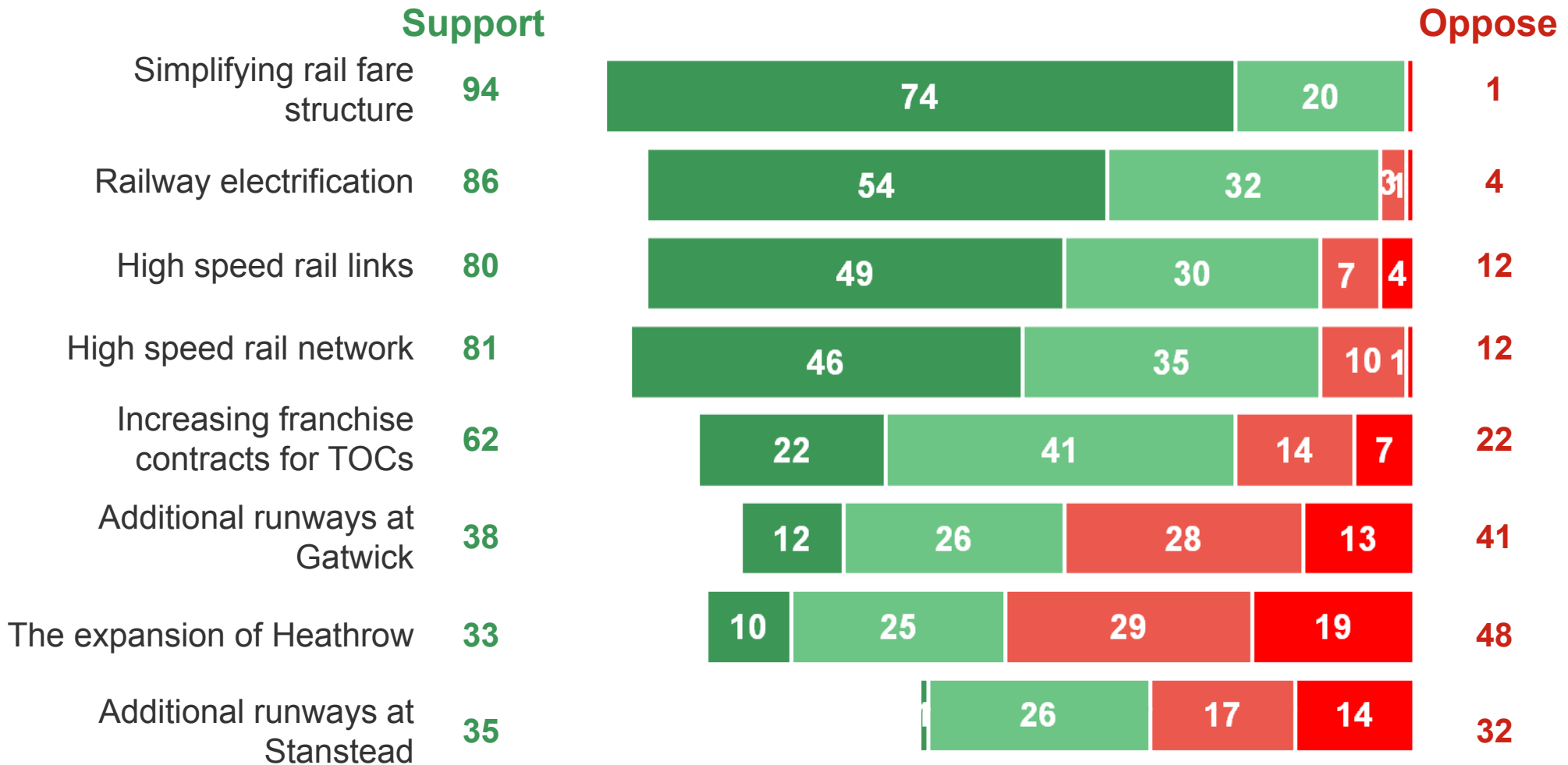


Base: All journalists: 2011 (69)

Greatest support shown for a simplified rail fare structure

How strongly do you support or oppose each of the following possible transport policies?

■ % Strongly support
 ■ % Tend to support
 ■ % Tend to oppose
 ■ % Strongly oppose



Base: All Transport Journalists, 69

Appendices:

- Sample Profile
- Background information
- Journalists Surveyed

Type of publication

	2006	2007	2008	2009	2010	2011
Daily/Sunday press (%)	39	48	36	41	43	28
Provincial press (%)	11	8	20	13	14	16
Periodicals (%)	26	19	26	29	29	28
Periodicals – trade (%)	21	11	21	25	23	25
Periodicals – public (%)	5	8	7	4	6	4
Broadcast press & other (e.g. news agency) (%)	23	23	17	21	16	23

Type of publication (Key Journalists)

	2010	2011
Daily/Sunday press (%)	32	24
Provincial press (%)	14	5
Periodicals (%)	64	48
Periodicals – trade (%)	50	43
Periodicals – public (%)	14	5
Broadcast press & other (e.g. news agency) (%)	14	10

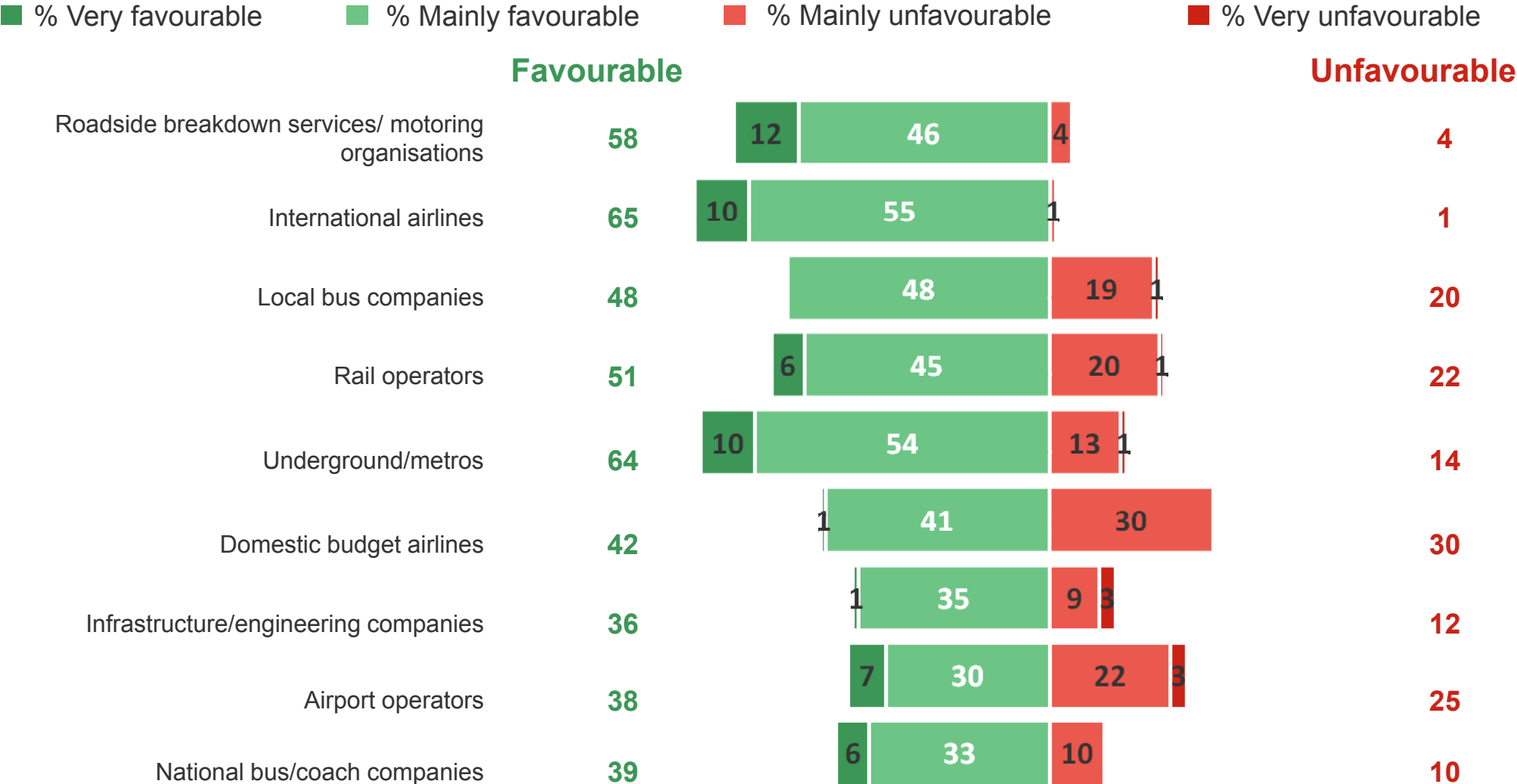
How similar is the sample with the previous survey?

	2006	2007	2008	2009	2010	2011
Number of respondents	57	61	76	68	70	69
Number of respondents who took part in the previous survey	26	28	36	37	42	52
How similar is the sample of journalists with last year's survey?	46%	46%	47%	54%	60%	75%

Background Information

Sector Favourability

Q How favourable or unfavourable are your opinions and impressions of each sector?

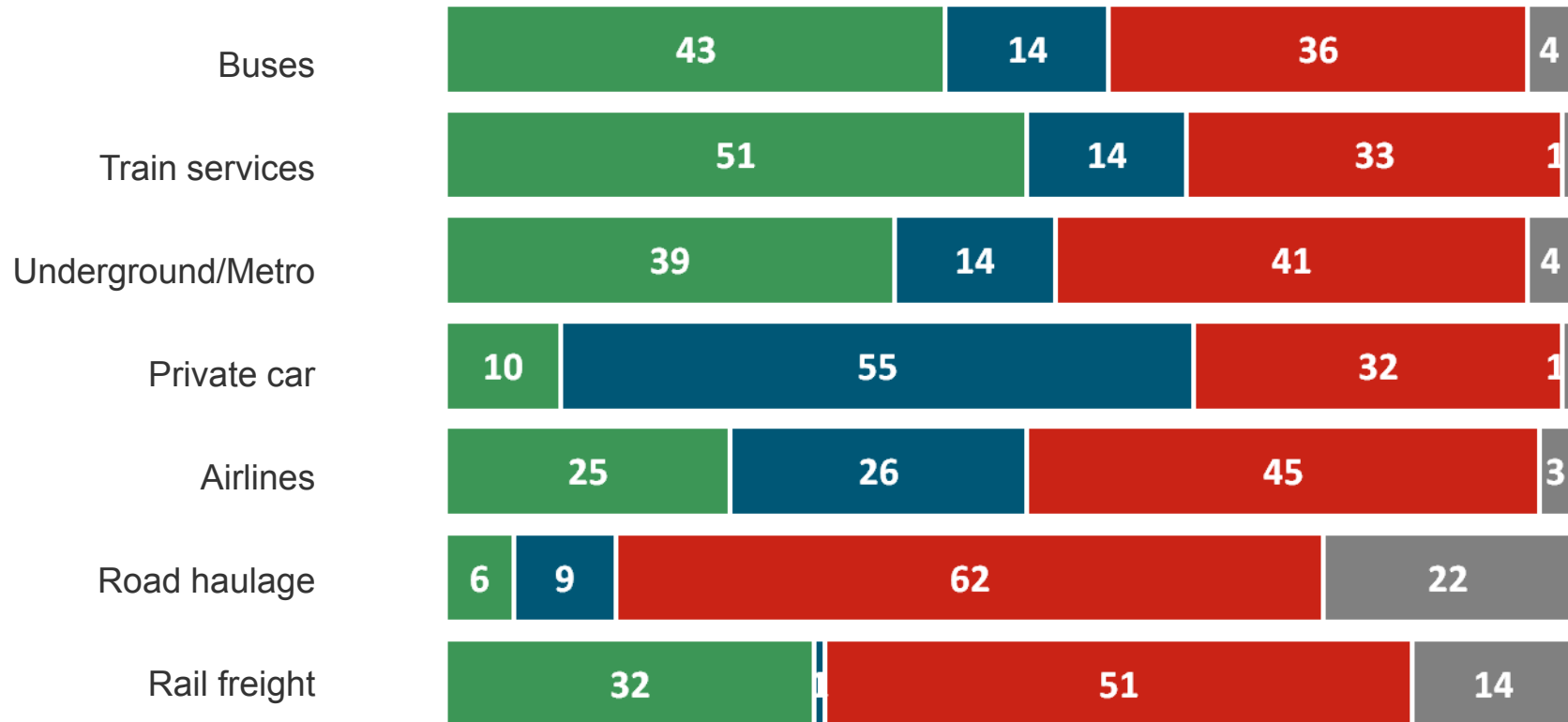


Base: All Transport Journalists (69), 2011

Improving modes of Transport

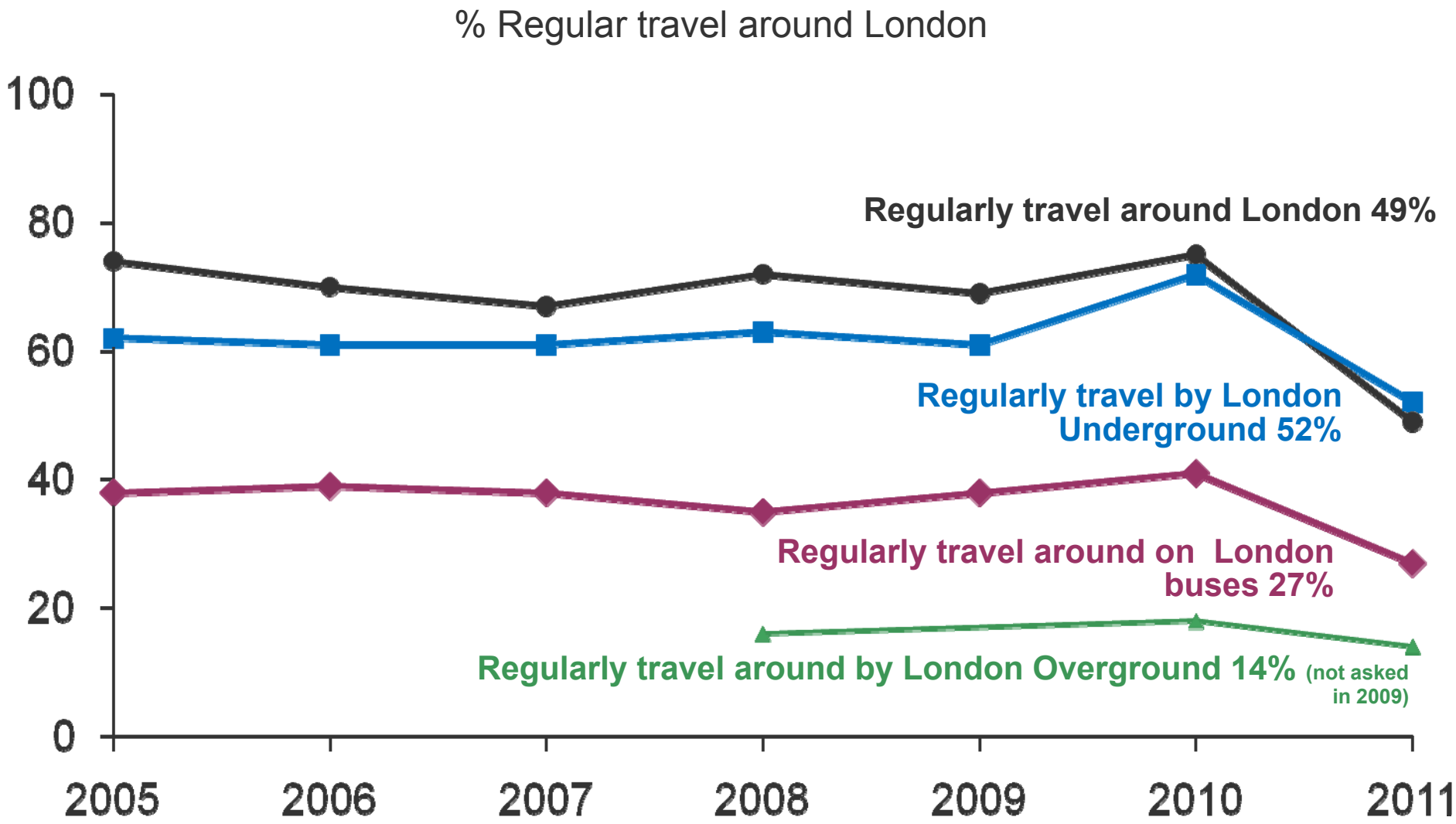
Q For each mode can you tell me whether over the past five years you think it has improved, deteriorated or stayed the same in terms of the overall quality of service each one provides in Britain?

■ % Improved ■ % Stayed the same ■ % Deteriorated ■ % Don't know/no opinion



Base: All Transport Journalists (69), 2011

How often do journalists travel around London?



Base: All Transport Journalists (67), 2011

What experience do journalists have with the TfL brands?

Q Thinking of your experience of . . . , which of these applies to you?

	TfL %	LU %	LB %	LO %
I regularly travel around London*	49	52	27	14
I occasionally travel around London*	42	37	51	61
I know a main board director	34	18	4	9
I have been on a site/ office visit	39	27	9	6
I have been a guest at a reception or social event	33	15	3	6
I have spoken to their press office	69	54	25	29
I have spoken to their Director of News	27	13	3	14
I have visited the website	86	42	33	37
I have received a communication from them	66	42	21	32
I have seen/heard their advertising	63	58	37	42
I have run favourable stories about them recently	45	27	12	26
I have run critical stories about them recently	37	28	9	6
None of these	-	4	10	14
Don't know	-	3	4	5

Base: All Transport Journalists who have at least heard of each organisation, (TfL 67), (LU 67), (LB 67), LO 66) 2011

* Wording slightly different for each medium but meaning is the same

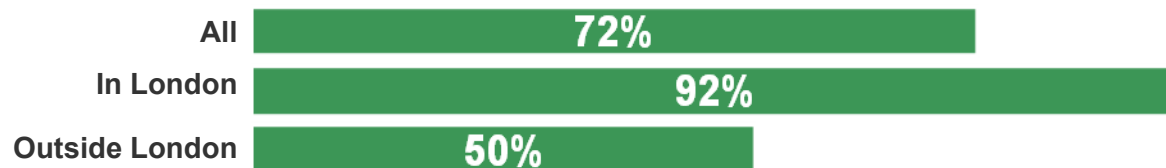
Journalists based outside London are less familiar with TfL, but are no more or less positive than those inside London

TfL Reputation Measures

Profile	2010	2011
All	70	69
Inside London	43	37
Outside London	27	32

Familiarity

% Know very well / fair amount



Favourability

% Favourable

% Unfavourable



Advocacy

% Speak highly

% Critical



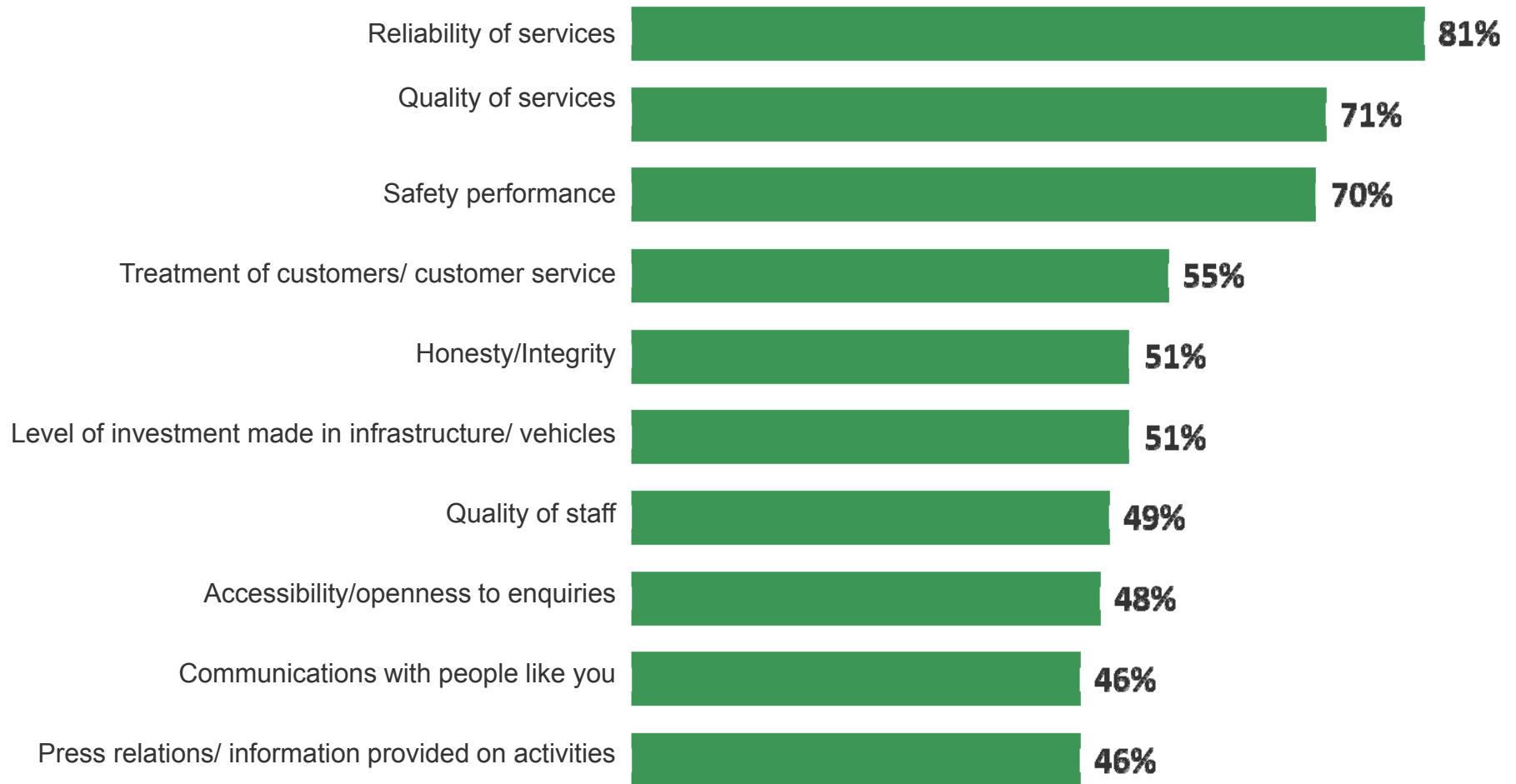
Net advocacy %



+11% difference in net advocacy scores

Top Criteria for judging companies

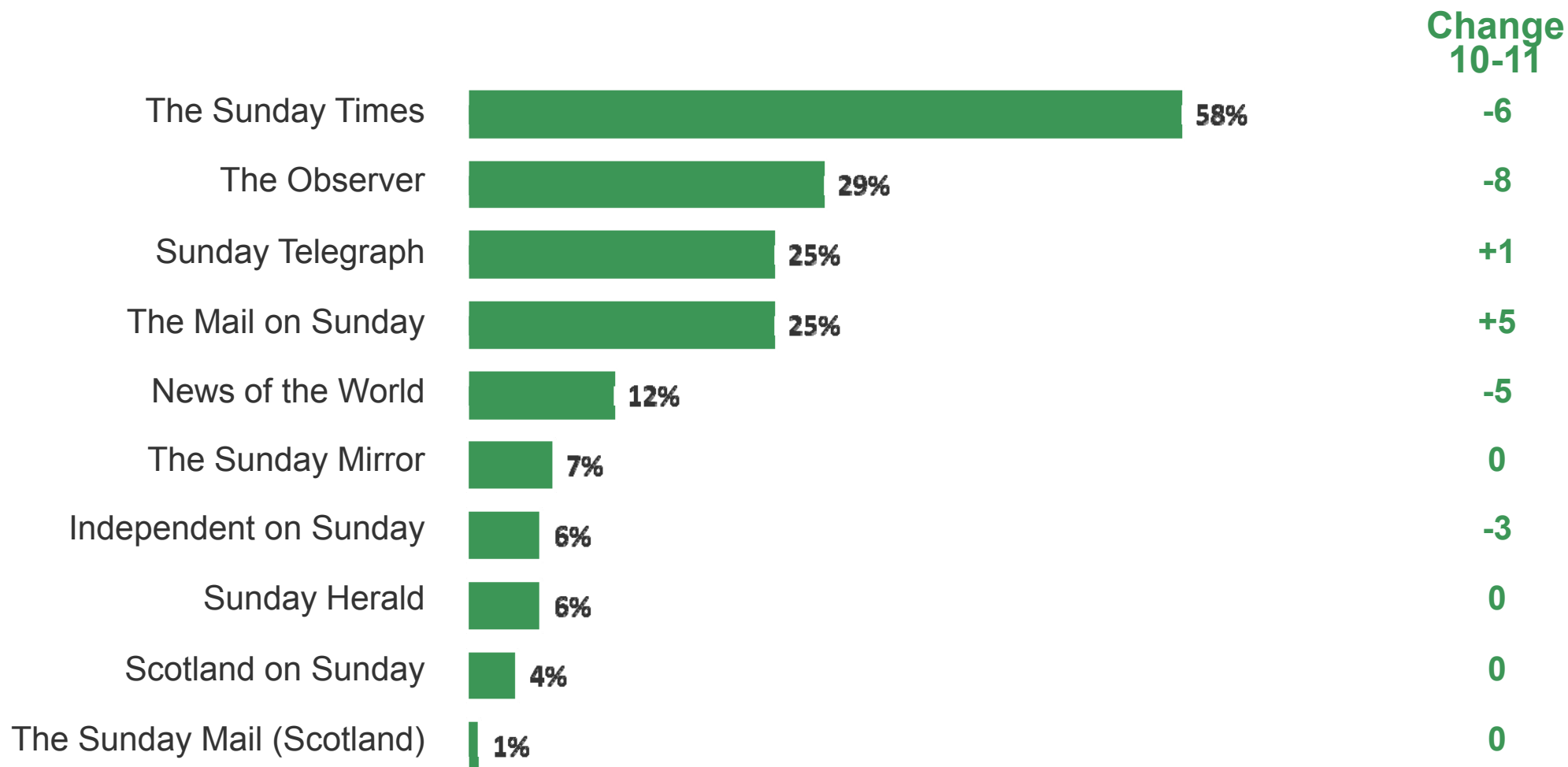
Q Which of the factors do you consider to be most important when making your judgement on companies and organisations involved in the transport industry?
Top ten mentions



Base: All Transport Journalists (69), 2011

Sunday publications

Q Which of these Sunday publications, if any, do you read regularly (at least 3 issues out of 4)? *Top ten mentions*

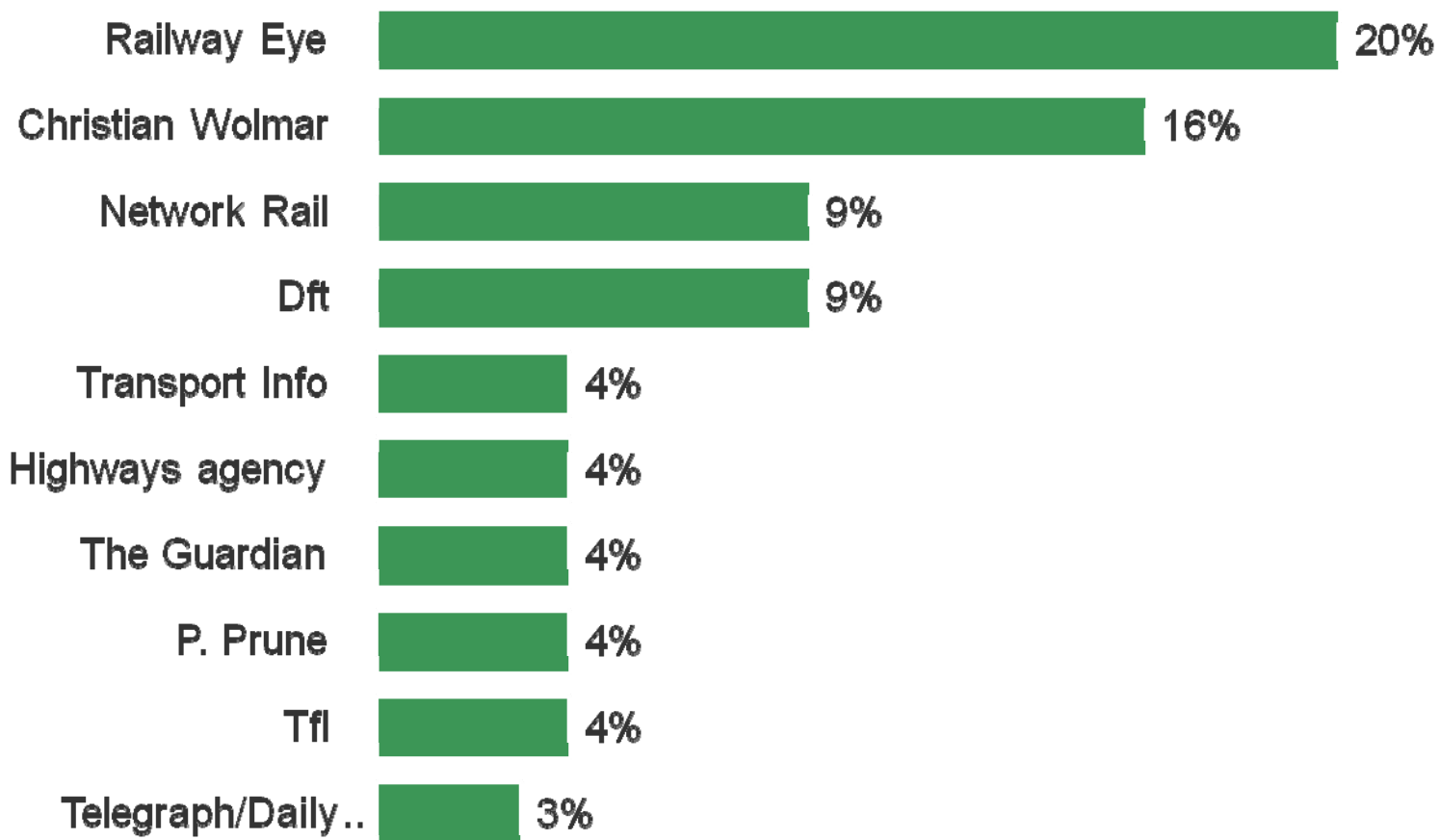


Base: All Transport Journalists (69), 2011

Most used blogs and websites

Q Which transport-related blogs or websites do you regularly read?

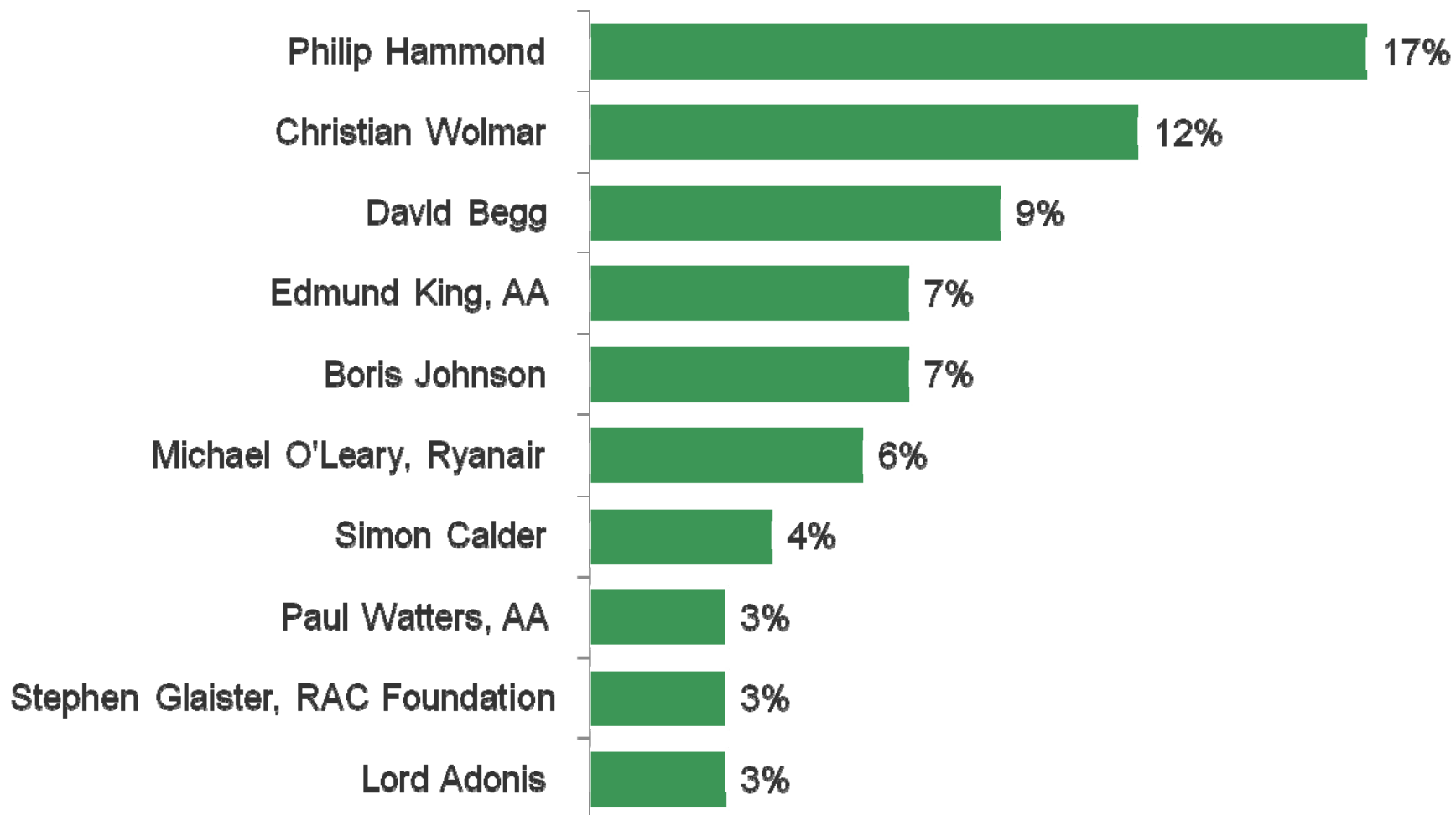
All mentions



Base: All Transport Journalists (69), 2011

Most impressive spokesperson

Q Who, in your opinion, is the most impressive spokesperson on transport issues at the moment? *Top mentions*



Base: All Transport Journalists (69), 2011

Journalists Surveyed

List of respondents 1

Journalist	Position	Company
Adrian Pearson*	Regional Affairs Correspondent	The Journal (Newcastle)
Adrian Tatum*	Editor	The Surveyor
Alan Salter*	Editor	Manchester Evening News
Alan Whitehouse*	Northern Transport Correspondent	BBC Yorkshire
Alexandra Wynne*	News Editor	New Civil Engineer
Alistair Dalton*	Transport Correspondent	The Scotsman
Andrea Klettner*	Reporter	Building Design
Andrew Forster*	Editor	Local Transport Today
Andrew Greaves*	Political Correspondent	The Bolton News
Angela Jameson	Freelancer	
Antony Oliver*	Editor	New Civil Engineer

*Journalists also interviewed in 2010. **Bold = TfL target journalists 2011**
Five journalists chose to remain anonymous

List of respondents 2

Journalist	Position	Company
Ben Hargreaves*	Senior Editor	Professional Engineering
Charles Starmer-Smith*	Associate Commissioning Editor	Daily Telegraph
Chris Choi	Consumer Affairs Editor	ITN
Chris Jackson	Editor	Railway Gazette International
Chris Marshall*	Transport & Environment Reporter	Edinburgh Evening News
Christian Wolmar*	Freelance	
Colin Sykes*	Environment and Transport Correspondent	BBC North West
Daniel Wainwright*	Local Politics Editor	Express & Star
David Fowler*	Editor	Transport Times
David Harrison*	Investigative Reporter	Sunday Telegraph
David Robertson*	Business correspondent	The Times

*Journalists also interviewed in 2010. **Bold = TfL target journalists 2011**
Five journalists chose to remain anonymous

List of respondents 3

Journalist	Position	Company
Diarmid O'Hara*	Editor, Reporting Scotland	BBC Scotland
Dylan Jones	Editor	GQ
Frank Barrett*	Travel Editor	Mail on Sunday
Gareth Edwards*	Editor	London Reconnections
Greg Truscott*	Chief Reporter	South London Press
James Abbott*	Editor	Modern Railways
James Dark*	Contributing Editor	Transit
Jeremy Watson*	Senior Reporter	Scotland on Sunday
John Higginson	Political Editor	Metro London
Kate Simon*	Travel Editor	The Independent on Sunday
Katie Silvester*	Editor	Rail Professional

*Journalists also interviewed in 2010. **Bold = TfL target journalists 2011**
Five journalists chose to remain anonymous

List of respondents 4

Journalist	Position	Company
Mark Carter	New Editor	BBC Southern Counties Radio
Mark Ellis	Transport Correspondent	The Mirror
Mark Hansford*	Managing editor	New Civil Engineer
Mark Leftly*	Deputy Editor	The Independent on Sunday
Martin Collier	Editor	Railway Strategies
Matt Smith*	Senior Reporter	The Southern Daily Echo
Matthew Squires*	Reporter	Lancashire Evening Post
Mike Edwards*	Senior Reporter	STV News
Mike Laycock*	Chief Reporter	York Evening Press
Mike Pearse*	Transport Correspondent	ITV PLC
Mike Walter*	News Editor	Transportation Professional magazine

*Journalists also interviewed in 2010. **Bold = Tfl target journalists 2011**
Five journalists chose to remain anonymous

List of respondents 5

Journalist	Position	Company
Nick Edwards	Editor	Construction News
Nigel Harris*	Managing Editor and Events Director	Rail
Paul Clifton*	Transport Correspondent	BBC South
Paul Geater	Transport & Environment Correspondent	Evening Star
Peter Plisner*	Transport Reporter	BBC Midlands Today
Rhodri Clark	Transport Journalist	Western Mail
Rhys Jones*	UK Transport and Defence Correspondent	Thomson Reuters
Richard Scott*	Transport Correspondent	Economics and Business
Richard Gurner	Web Editor	Brighton Argus
Richard Hope*	Consultant Editor	Railway Gazette International
Robert Jack*	Managing Editor	Passenger Transport

*Journalists also interviewed in 2010. **Bold = TfL target journalists 2011**
Five journalists chose to remain anonymous

List of respondents 6

Journalist	Position	Company
Roger Baird*	Freelance Journalist	
Ross Lydall*	Chief News Correspondent	The Evening Standard
Sally Boazman	Travel Reporter	BBC Radio Two
Sim Harris	Managing Editor	Rail News
Simon Calder*	Senior Travel Editor	The Independent
Simon Carr	Reporter	Newspaper House
Tom Palmer	Political Correspondent	Yorkshire Post Newspapers
Tony Miles	Journalist	Railway Gazette
Trevor Sturgess	Business Editor	Kent Messenger

*Journalists also interviewed in 2010. **Bold = TfL target journalists 2011**
Five journalists chose to remain anonymous