Transport for London

Ipsos MORI Survey of MPs 2012 Transport for London April 2013

MAYOR OF LONDON Transport for London

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This report presents findings from the winter 2012 wave of Ipsos MORI's Members of Parliament survey, part of Ipsos MORI's programme of regular multi-sponsored studies among key audiences

- 103 MPs answered the TfL, LU, LB, LS and LO questions (43 Conservatives, 11 Liberal Democrats, 48 Labour and 1 other) unless additional filters were applied.
- The sample interviewed is closely representative of the House.

- Fieldwork dates: 29 October 21 December 2012
- Data collected by face to face CAPI interviews



Fieldwork

 Sometimes the percentage result for 'All MPs' may be greater than the sum of Labour and Conservative MPs, as it includes results from other parties. Where results do not sum to 100%, this may be due to computer rounding, multiple responses, or the exclusion of 'don't know' categories Based on those asked each question, data have been individually weighted where necessary to reflect the true balance by party and ministerial or spokesperson position



Sample



Interpretation



Questionnaire



Executive Summary

Top 5 key findings from the research



- 1. The results show considerable improvements in MPs perceptions of the organisation, particularly for TfL and LU, both compared to 2011 and since 2005
- 2. London Buses is less well known than TfL and LU, and London Overground has still lower awareness again, but MPs have fairly positive perceptions of both LB and LO
- 3. Two thirds of MPs agree that TfL makes a positive contribution to the quality of life in London
- 4. MPs are highly supportive of investment in LU and 88% say that it is important to London's future to maintain the planned level of investment in LU
- 5. MPs are now more likely to think LU is a world class transport service and they rate its service more highly than in recent years



Summary of Key Findings and Implications



TfL and LU have each made large improvements in reputation among MPs in 2012 vs 2011, as well as in the longer term (since 2005)

- In 2012 compared to 2011, TfL's net favourability is up by 19 percentage points to +61%.
 Advocacy scores have also increased, by 17 percentage points to +39%. Both favourability and advocacy are well up on what they were in 2005 (+17 and +9 respectively)
- For LU in 2012, net favourability is higher than ever before at +66%, (9 percentage points up on 2011). Net advocacy is +61%, up by an impressive 25 percentage points over 2011 and well above the 2004 figure of +2
- The successful way that London's transport network performed during the Olympics has undoubtedly boosted perceptions and LU and TfL appear to be the main beneficiaries of this favourable opinion
- These improvements in perceptions for LU and TfL have been particularly strong among Labour MPs this year

London Buses is not as well known as LU and TfL, but continues to maintain fairly positive levels of favourability and advocacy

- Familiarity with LB has increased slightly since 2011 (from +51% to +58% know very well/a fair amount), though this is still below the level of 2006. LB continues to be less well known than either LU or TfL
- Net favourability (+58%) and advocacy (+43%) levels for LB in 2012 are largely unchanged over 2011, but are nonetheless positive





MPs have relatively low levels of knowledge of London Overground but familiarity continues to grow and reputation ratings are fairly positive

- Familiarity with LO in 2012 is up to 35% who know it very well/a fair amount (32% in 2011, 29% in 2010)
- Net favourability is up to +27% (from +19%) and net advocacy up to +16% (from +11%)

The majority of MPs are unfamiliar with London Streets

- 75% of MPs say they have never heard of LS and only 4% say they know LS very well/a fair amount, with 11% saying they know it 'just a little' and 10% saying 'heard of but know nothing about it'
- Of the few MPs who have heard of LS, 11% are favourable and 11% would be advocates, but the
 majority are neutral, most probably due to lack of knowledge

MPs are highly supportive of investment in LU

- Over three-quarters of MPs (77%) agree that LU is delivering real transport improvements through investment
- Almost nine in ten MPs (88%) say that it is important to London's future to maintain the planned level of investment in London Underground

Positive ratings on momentum for TfL, LU and LB

 At least 55% of MPs believe TfL, LU and LB are each 'on the way up' with only a small minority (up to 6% for all three organisations) saying it is 'on the way down'





MPs have a high level of trust* in LU but slightly lower trust in TfL and LB

- Two-thirds of MPs either strongly or tend to agree that LU is an organisation they can trust
- 40% of MPs give a score of at least 7 out of 10 for TfL and LB (respectively) on trust, which overall
 gives a mean score of 62 and 64 respectively. While not the lowest scoring ratings for TfL and LB,
 this driver is an area of relative weakness

TfL is positively rated on its contribution to the quality of life in London

- MPs agree that TfL is making a positive contribution to the quality of life in London (mean score = 72) and that it is investing to improve the travel experience (mean score = 70)
- However, TfL is relatively weaker on 'being easy to do business with' and 'communicating honestly and openly' (with mean scores of 61 out of 100)

MPs are now more likely to think LU is a world class transport service

- In 2012, LU received a mean score of 71 out of 100 on this metric, up 5 points since 2011 and 10 points overall since 2008
- Ratings of LUs overall level of service has improved by 4 points since 2011 to give a mean score of 74 (and up 7 points since 2008)





London Buses is seen to provide a good service and contribute to the economy - though lack of knowledge among some MPs leads to fairly high neutral ratings for LB

- LB continues to be rated quite highly for delivering a good bus service for customers (mean score = 72 compared to 70 in 2011) and providing a bus service which helps London's economy (mean score = 76 compared to 74 a year ago)
- The proportion of MPs who give neutral or don't know responses on LB metrics ranges between 22% and 64%, indicating their limited knowledge of the organisation's performance

Low levels of knowledge about London Streets lead to many MPs giving neutral or don't know ratings of the organisation's performance

- The range of neutral or don't know ratings of LS's performance is from 22% to 64%.
- However, a quarter are confident that LS is successfully introducing cycle schemes and that it is a trusted source of driver information



Implications



Having made significant gains in the last year, the challenge for TfL and LU now lies in retention and building upon higher ratings in future

 TfL and LU are in a strong position to capitalise on these successes and should be communicating with MPs around the ongoing benefits they will bring to London

LB needs to look at what it can learn from these successes, while LS still has work to do to establish its reputation among MPs

There is widespread recognition of and support for continued investment in London's transport infrastructure

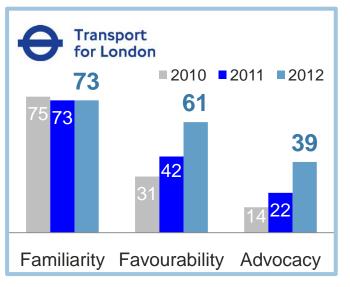
 Whilst most MPs see levels of investment as about right at this point in time, they recognise the need for continuing development in order to maintain the system and the increasing demands placed on it

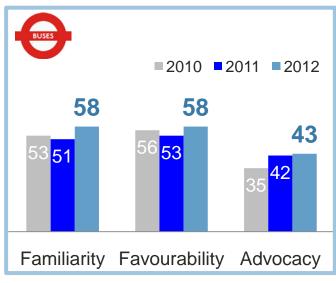


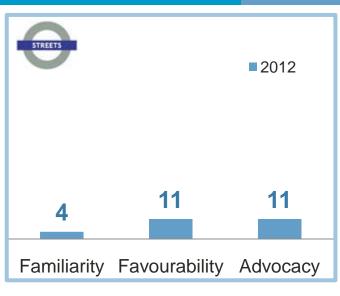
Reputational summary: Overview

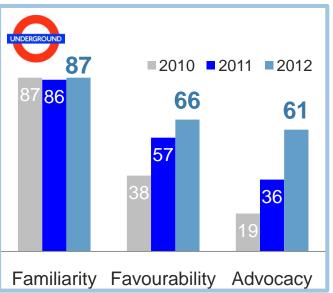
MPs Reputational summary

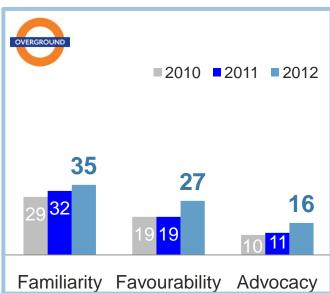












Familiarity:

% Know very well/a fair amount

Favourability:

Net (% favourable minus % unfavourable)

Advocacy:

Net (% advocates minus % critics)





Reputational summary: TfL

Key findings – TfL summary



- TfL has made considerable gains in favourability and advocacy, and is seen to be an organisation on the way up
 - Net favourability is up by 19 percentage points to +61%. Advocacy scores have followed suit, with a similar upward shift of 17 percentage points to +39%
 - Three in five see it as an organisation on the way up, while just two percent feel it is on the way down
- TfL is positively rated on its contribution to the quality of life in London, reliability of service and investing to improve the experience of the travelling public
 - MPs agree that TfL is making a positive contribution to the quality of life in London (mean score = 72) and that it is investing to improve the travel experience (mean score = 70)
 - The majority agree that TfL provides a reliable service everyday (mean score = 69)
- TfL's relative weaknesses are:
 - Providing good value for money (mean score = 63)
 - Valuing customers and their time and being an organisation I can trust (mean scores = 62)
 - Being easy to do business with and communicating honestly and openly (mean scores = 61)
 - Around half MPs give a neutral rating for TfL on the above areas of relative weakness, indicating lack knowledge rather than negative opinion
 - Two in five give TfL a score of at least 7 out of 10 for an organisation I can trust*, compared with twothirds who strongly or tend to agree on the same measure for LU



^{*} NB. Care must be taken when comparing LU with TfL or LB on this metric as this was asked on a 5 point agree



Key reputation measures – TfL summary



	2005	2006	2007	2008	2009	2010	2011	2012
Net Advocacy (% Speak highly minus % speak critically)	9	3	-5	9	22	14	22	39
Net Favourability (% Favourable minus % unfavourable)	17	14	13	27	37	31	42	61
Familiarity (% know very well / a fair amount)	64	65	68	70	67	75	73	73



TfL's reputation drivers - Summary

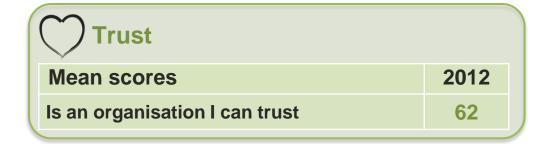


What TfL stands for	
Mean scores	2012
Makes a positive contribution to the quality of life in London	72
Values customers and their time	62
Communicates honestly and openly	61

Experience	
Mean scores	2012
Provides a reliable service every day	69
Is easy to do business with	61

X=Yx2 Value	
Mean scores	2012
Provides good value for money	63

Progress & Innovation	
Mean scores	2012
Is investing to improve the experience of the travelling public in London	70
Momentum (% 'Really/On the way up')	59
Momentum (% 'Really/On the way down')	2





Reputational summary: LU

Key findings – LU summary (1)



- Advocacy scores for LU have improved considerably since 2011 and there has also been some positive movement on favourability
 - Net advocacy is up by 25 percentage points to +61%. At +66%, net favourability is higher than ever before. Seven in ten MPs describe LU as an organisation which is on the way up
- MPs are now more likely to think LU is a world class transport service
 - LU now receives a mean score rating of 71 out of 100 on this metric, up 5 points since 2011 and 10 points overall since 2008.
 - Compared to 2011, LU shows small gains on a number of metrics. Looking at the longer term, there have been significant gains since 2008 on the following metrics:
 - Valuing customers' time (+10 points)
 - Is reliable and a safe way to travel without fear of crime (both +9)
 - Helpful and friendly staff, easily accessible to everyone (both +8)
 - Overall level of service, caring about customers, professional staff, integration with other transport services (all +7)
 - The mean score for the management of works and closures has improved by 9 points since 2010. However, this continues to be an area of relative weakness for LU
- Two-thirds of MPs believe LU is a trustworthy organisation
 - Two-thirds of MPs agree LU is an organisation they can trust*, with 6% who disagree. This
 compares favourably to TfL and LB, where two-in-five MPs give a score of at least 7 out of 10
 on the same measure



Key findings – LU summary (2)



- Recognition of investment is widespread and, perhaps more importantly, is seen to be making a real difference
 - Over three-quarters of MPs (77%) agree that LU is delivering real transport improvements through investment in line with the figure from 2011 (74%)
 - Almost nine in ten MPs (88%) say that it is important to London's future to maintain the planned level of investment in London Underground
- Being an enjoyable way to get about continues to be a relative weakness as is accessibility, perceived value for money and open and honest communications
 - These are the areas where one in ten MPs (or more) give a score of 0 − 3 out of 10



Key reputation measures – LU summary



	2005	2006	2007	2008	2009	2010	2011	2012
Net Advocacy (% Speak highly minus % speak critically)	18	7	22	25	36	19	36	61
Net Favourability (% Favourable minus % unfavourable)	22	26	45	47	46	38	57	66
Familiarity (% know very well / a fair amount)	87	88	84	88	86	87	86	87



LU's reputation drivers – What LU stands for





Mean scores (unless where stated)	2008	2009	2010	2011	2012	Chg '11-'12 <u>+</u> %
Is simple to use	73	76	73	75	77	+2
Is ideal for unfamiliar journeys	66	71	70	70	72	+2
Is a world-class transport service	61	61	63	66	71	+5
Cares about its customers	58	60	60	63	65	+2
Treats its employees fairly	57	55	58	64	63	-1
Recognises that my time is important to me	50	56	53	59	60	+1
Communicates openly and honestly about its plans for the future* (Net agree: % agree minus % disagree)	-	-	-	-	+39	n/a



^{*} A new scale has been used in 2012, so previous results are not comparable for this measure. 2012 score is a net agreement score rather than a mean score out of 100

LU's reputation drivers – Experience

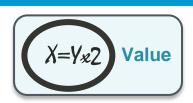




Mean scores	2008	2009	2010	2011	2012	Chg '11-'12 <u>+</u> %
Is a fast way to get around London	79	79	81	82	84	+2
Is a safe way to travel without fear of accident	74	80	79	80	80	0
Overall level of service	67	66	68	70	74	+4
Is well integrated with other transport services	66	64	67	70	73	+3
Is a safe way to travel without fear of crime	64	67	68	71	73	+2
Is reliable	63	66	67	69	72	+3
Has professional staff	60	59	60	63	67	+4
Has friendly and helpful staff	55	55	55	60	63	+3
Is easily accessible to everyone	54	60	63	63	62	-1
Is an enjoyable way of getting about	49	49	49	52	53	+1

LU's reputation drivers – Value





Mean scores (unless where stated)	2008	2009	2010	2011	2012	Chg '11-'12 <u>+</u> %
Is a well managed organisation	59	60	59	63	65	+2
Provides good value for money* (Net agree: % agree minus % disagree)	-	-	-	-	+50	-

^{*}Net agreement score rather than a mean score out of 100



LU's reputation drivers – Progress & Innovation – Trust





Mean scores (unless where stated)	2008	2009	2010	2011	2012	Chg '11-'12 <u>+</u> %
Is investing to improve the quality of its services	70	70	66	72	72	0
Invests in new technology to improve its services	-	-	-	69	68	-1
Manages works and closures effectively	-	-	52	58	61	+3
Is delivering real transport improvements through investment* (Net agree: % agree minus % disagree)	-	-	-	+68	+73	+5
%						
Momentum (% 'Really/On the way up')	-	-	-	-	69	-
Momentum (% 'Really/On the way down')	-	-	-	-	6	-

Trust	2008	2009	2010	2011	2012	Chg '11- '12 <u>+</u> %
Is an organisation I can trust* (Net agree: % agree minus % disagree)	-	-	-	-	+60	-



Reputational summary: LB

Key findings – LB summary



- LB continues to be well regarded in Westminster, maintaining a solid level of favourability and advocacy
 - Net favourability (+58%) and advocacy (+43%) levels are largely unchanged, but are nonetheless positive
 - Familiarity with LB has increased slightly since 2011 (net familiarity has climbed from +51% to +58%) However, LB continues to be less well known than either LU or TfL.
- Over half see LB as on the way up
 - Positive momentum of LB is driven by the introduction of modern buses, improved customer communications and the overall level of service
 - This is reflected in strong ratings for introducing buses with a lower negative impact on the environment and investing in improved bus information
- Delivering a good service, value for money and contribution to the economy are relative strengths
 - LB is well regarded in these areas, particularly with regards to its contribution to the economy (the mean score is 76 out 100)
- Many MPs are still to be convinced for some aspects of LB's reputation, though the balance of opinion is still positive
 - Many MPs are neutral on whether LB values its customers and their time (the mean score is 60), is improving journey time reliability (mean score = 62) and whether it is an organisation they can trust (mean score = 64 out of 100)

Key reputation measures – London Buses Summary

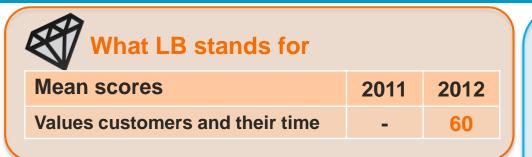


	2005	2006	2007	2008	2009	2010	2011	2012
Net Advocacy (% Speak highly minus % speak critically)	40	32	40	35	34	35	42	43
Net Favourability (% Favourable minus % unfavourable)	50	42	49	55	46	56	53	58
Familiarity (% know very well / a fair amount)	60	68	51	53	55	53	51	58



LB's reputation drivers - Summary





Experience		
Mean scores	2011	2012
Is delivering a good bus service for customers	70	72
Is improving bus journey time reliability	-	62

Trust	
Mean scores	2012
Is an organisation I can trust	64

X=Y×2 Value		
Mean scores	2011	2012
Is providing a bus service which helps London's economy	74	76
Provides good value for money	-	71

Progress & Innovation		
Mean scores	2011	2012
Is introducing buses which have lower negative impact on the environment	72	73
Is investing in improved bus information for customers	69	69
Momentum (% 'Really/On the way up')	-	55
Momentum (% 'Really/On the way down')	-	2



Reputational summary: London Streets

Key findings – London Streets summary



- The majority of MPs are unfamiliar with London Streets
 - Even after having been told that LS is part of TfL, when asked to describe LS' role around a third (37%) of MPs say that they do not know or have never heard of the organisation. Some were able to guess what its roles and responsibilities might be from the name as well as the introduction given at the start of the interview
 - Of those who gave an answer, the most commonly cited roles are responsibility for London's road network and repairs (17%) and promoting walking and improving pedestrian access (15%). Some others mention promoting cycling, street furniture and street cleaning
- A quarter agree that LS is a trusted source of driver information
 - However, two in three are neutral or don't know enough to give an opinion
- Most are either neutral (49%) or do not know (22%) if LS is successfully managing London's traffic
 - Around 17% agree that it is successfully managing traffic, while 12% feel that it is not
- One in four are confident that LS is successfully introducing cycle schemes to encourage more people to cycle
 - MPs are less certain whether LS is reducing traffic disruption, improving air quality or reducing CO₂ emissions. In each case, around four in ten are neutral and a third say that they do not know



Key reputation measures – London Streets Summary

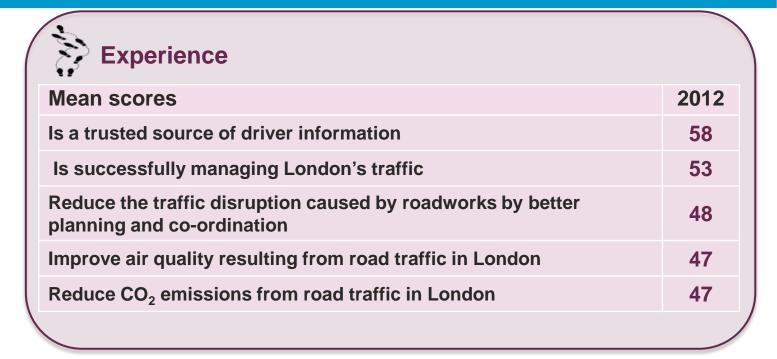


	2012
Net Advocacy (% Speak highly minus % speak critically)	11
Net Favourability (% Favourable minus % unfavourable)	11
Familiarity (% know very well / a fair amount)	4



LS's reputation drivers - Summary





Progress & Innovation		
Mean scores	2012	
Introduce new cycle schemes to encourage more people to cycle	60	



Industry context

Industry context (summary)



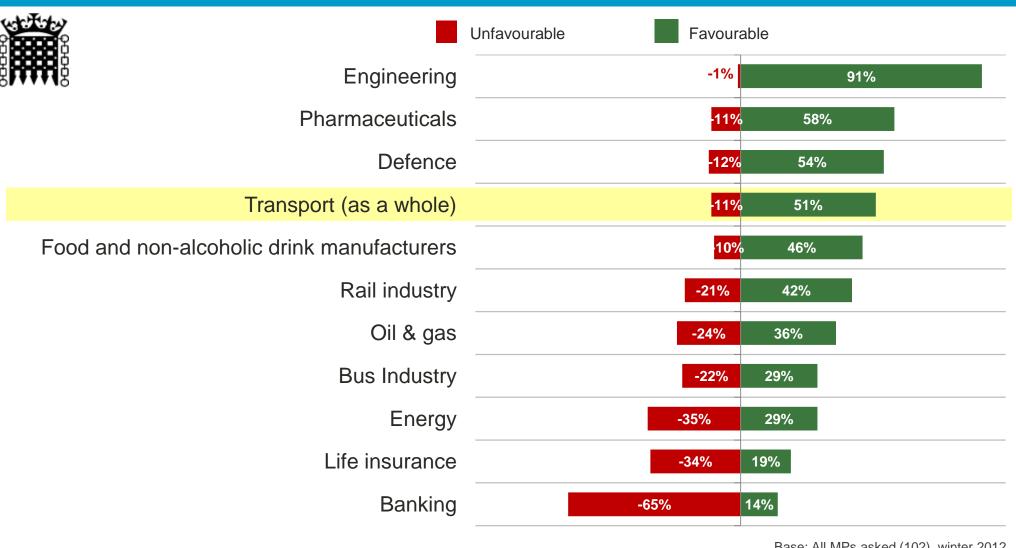
- Transport as a whole is generally well regarded by MPs
 - Half of MPs are favourable towards transport overall, while just one in ten is unfavourable
 - However, MPs are less positive when asked about their opinions of the rail and bus industries more specifically
 - Views of the rail industry are positive overall, though one in five MPs are unfavourable towards it
 - Perceptions of the bus industry in general are generally less positive (29% are positive, 22% negative), though most tend to be neutral



Industry favourability – All MPs



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



Base: All MPs asked (102), winter 2012



Industry context (summary)



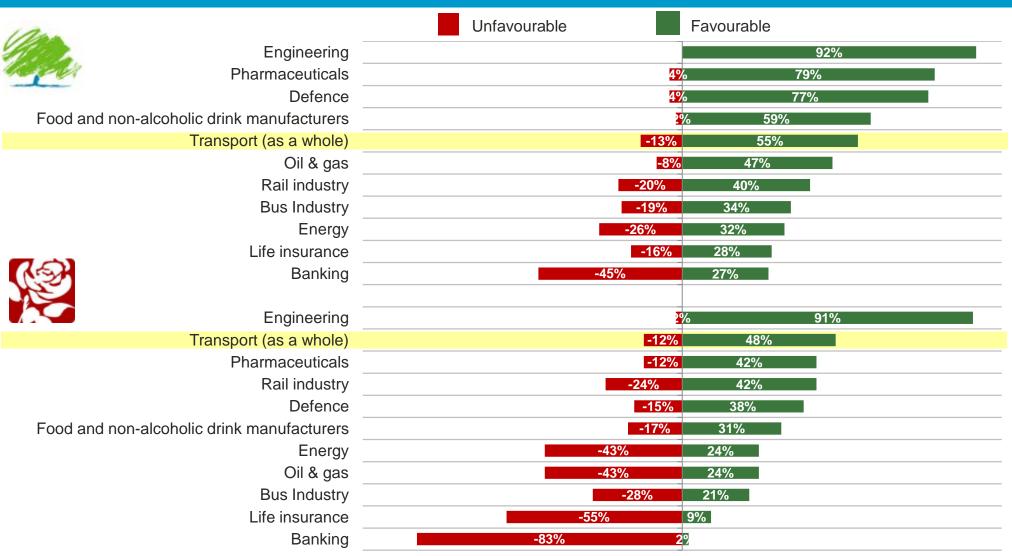
- Conservative MPs generally tend to be more favourable towards specific industries than Labour MPs
 - Transport is the second best regarded industry for Labour MPs, though there is more positive sentiment towards transport on the Conservative benches, despite it being ranked just fifth



Industry favourability - Conservatives vs Labour MPs



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



Familiarity

Familiarity (summary)



- LU is the best known of TfL, LB, LO and LS, almost nine in ten (87%) are very or fairly familiar
 - LU is the best known of its peer organisations, with top level familiarity on a par with British Airways (87%) and just ahead of Network Rail (80%)
 - Just over seven in ten (73%) are very or fairly familiar with TfL, just ahead of Eurostar
 - MPs are reasonably familiar with LB; 58% know it at least fairly well. LO is less well known, though nine in ten have at least heard of it
 - Few MPs have heard of London Streets* A quarter (24%) say they have a least heard of it. Few know it well. Just four percent know it very well or a fair amount

*NB: On one or two occasions where MPs misconstrued the question wording (*How well do you feel you know London Streets?*) and framed their answers around, for example, specific streets in London, interviewers provided MPs the following prompt:

"London Streets is part of Transport for London"

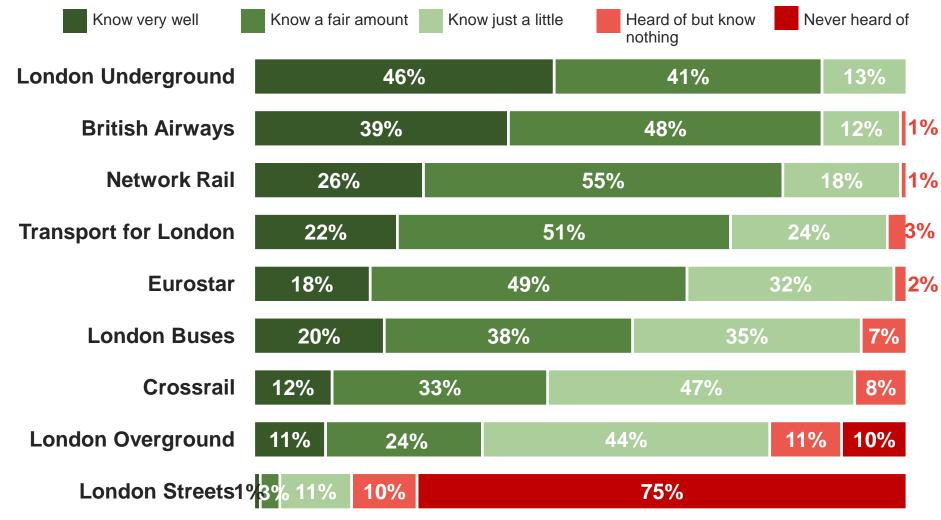


Familiarity – all MPs



Q How well do you feel you know…?





Base: All MPs asked (103), winter 2012



Familiarity (summary)



- Little year on year change in familiarity levels for TfL, LU and LO
 - LB is the only organisation to see much change in familiarity levels since 2011,
 with a slight jump of seven percentage points in those knowing it very well or a fair amount, though this is not significant
 - Little change in overall familiarity for the other measured organisations



Familiarity – sub-groups and trends



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

	All		Conservative		Labour	
Know very well / a fair amount	W12	Change W11-W12	W12	Change W11-W12	W12	Change W11-W12
	%	%	%	%	%	%
London Underground	87	+1	89	-5	85	+2
British Airways	87	0	86	-8	88	+5
Network Rail	80	-2	81	-4	78	-4
Transport for London	73	0	79	+3	67	-2
Eurostar	67	-1	64	-12	68	+7
London Buses	58	+7	50	+11	65	+5
Crossrail	45	-5	40	-12	56	+9
London Overground	35	+3	30	-7	40	-7
London Streets	4	N/A	2	N/A	6	N/A

Base: All MPs (103), Conservative MPs (43), Labour MPs (48) asked, winter 2012



Familiarity (summary)



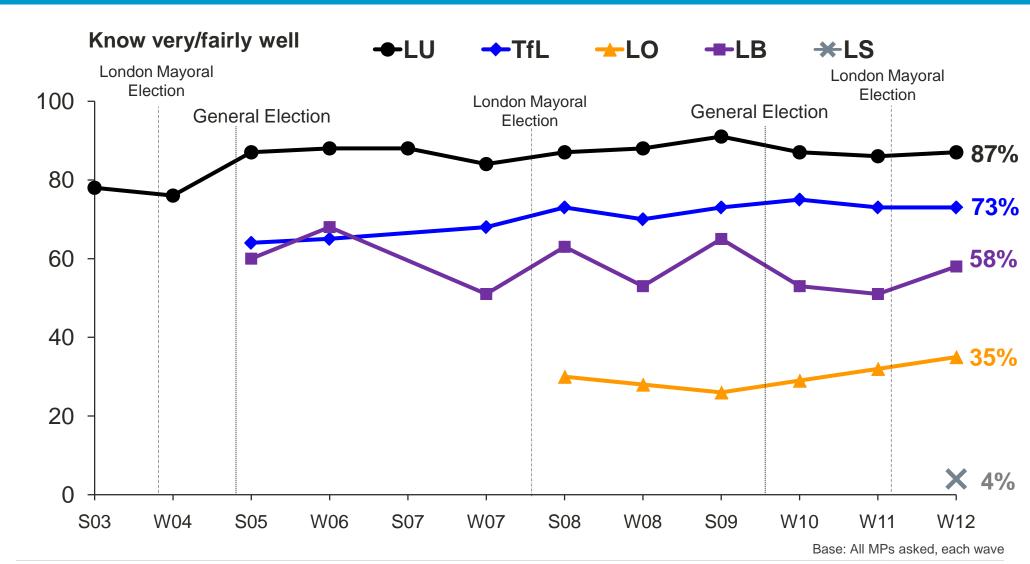
- Over the past few years, familiarity levels for TfL and LU have been fairly stable
 - LO has steadily become better known in Westminster year-on-year and is better known now than at any point over the past 4 years
 - After a slight dip, LB sees familiarity levels recovering, though it is not as well known as it was in winter 2006



Familiarity – trends



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



Favourability

Favourability (summary)



LU and TfL make large gains in favourability

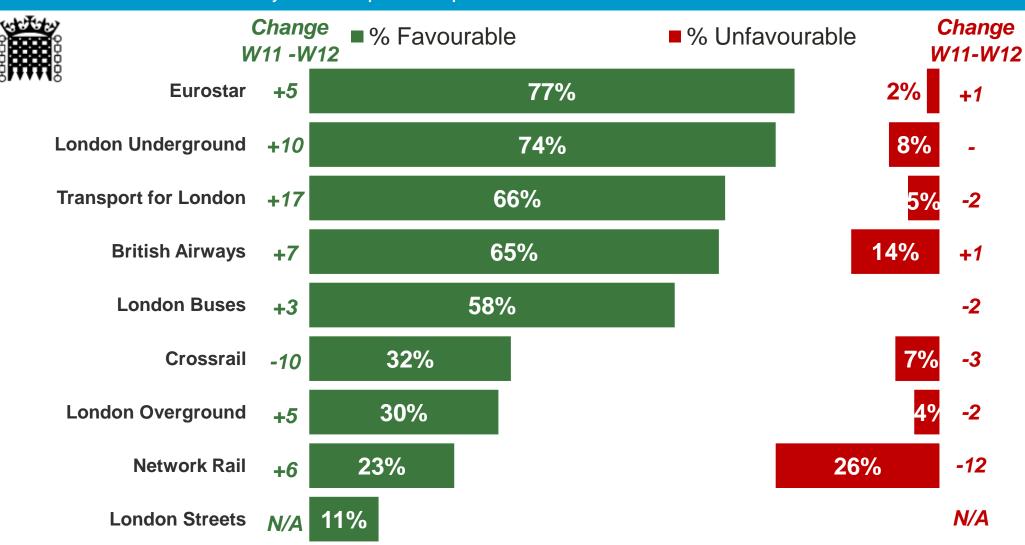
- TfL has made notable improvements to the level of favourability towards it in the House. The proportion who are very/mainly favourable towards it has risen by 17 percentage points to 66%
- LU had also made similar gains, though this upward shift is not significant.
 Favourability is up by ten percentage points to 74%. This has helped LU narrow the gap between it and Eurostar, which is now only marginally ahead
- LB retains its position with a solid level of favourability. Three fifths are favourable towards it. None are unfavourable
- LO has made some incremental improvements (favourability is up by five percentage points to 30%) though a majority are neutral towards it
- Only MPs who said they had heard of London Streets (26 MPs in total) were asked about favourability (and advocacy) towards LS. The majority of MPs who were asked said they have a neutral opinion of LS, with one in ten saying they regard it well
- Network Rail's overall standing has improved, though this is more to do with a reduction in unfavourable opinion rather than an upward shift in favourability



Favourability – all MPs



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



Base: All MPs asked who have at least heard of each organisation, winter 2012



Favourability - Conservatives vs Labour MPs (summary)



- Increasingly positive perceptions of LU and TfL among Labour MPs have helped drive up overall levels of favourability for each
 - Perceptions of TfL and LU remain largely stable among the Conservatives.
 However, there has been a notable surge of positive opinion towards TfL on the Labour benches, with favourable opinion up by 26 percentage points to 63%. LU has also made positive gains, though the improvement is less pronounced (up 14 percentage points to 79%)
 - Among the peer organisations, British Airways has also made improvements, with a slight upward shift in positive opinion among Labour MPs (up 16 percentage points to 64%)

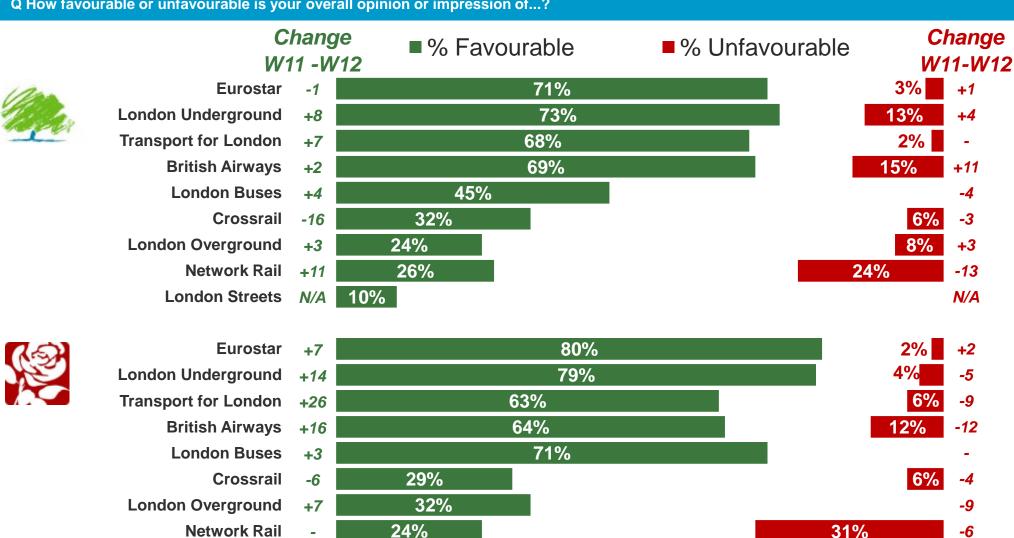


Favourability – Conservatives vs Labour MPs

15%



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





N/A

London Streets

Favourability – trends (summary)



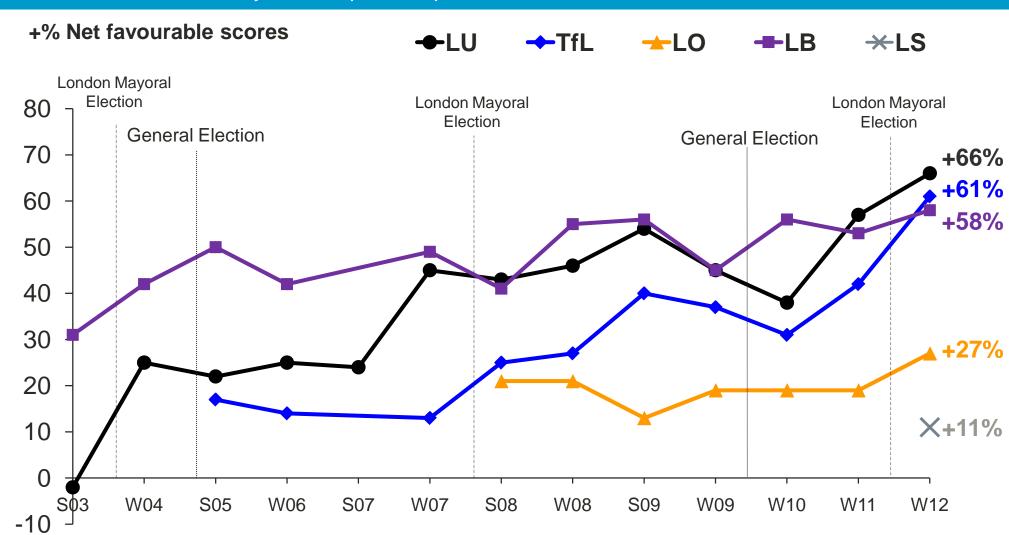
- Over the past seven years, net favourability towards TfL and LU has considerably improved
 - Despite a dip in the winter of 2010, net favourability levels for both TfL and LU have made a significant and sustained improvement since summer 2005. Current net favourability scores (+61% for TfL and +66% for LU) each represent a 44 percentage point increase on 2005 levels
 - The year-on-year improvement from winter 2011-2012 has been positive and longer term trends show a sustained and consistent improvement in MPs perceptions of both organisations
 - The situation is similar for LB. Compared to its position in 2003, current favourability levels are a marked improvement (though over the past 10 years, it has not seen quite the same level of improvement as TfL and LU). However, current net favourability (58%) is the highest on record, just above the previous highs of +56% in summer 2009 and winter 2010
 - Having seen no change in net favourability levels since winter 2009, LO has seen
 a slight improvement to its favourability, with a score of +27% this year again the
 highest yet to be measured



Favourability – trends



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



Base: All MPs asked who have at least heard of each organisation, each wave



Reputation in context

Reputation in context



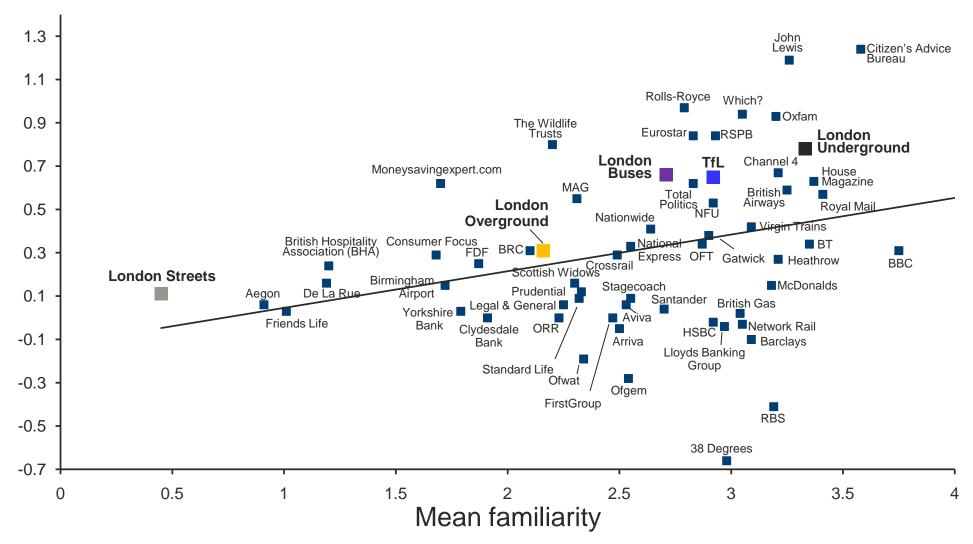
- The following chart shows mean familiarity plotted against mean favourability. In reputation research, a relationship between these two measures can usually be seen in that familiarity with an organisation tends to freed favourability. However, this does not always hold true, particularly when organisations are well known for the wrong reasons e.g. companies within the banking sector
- The line of best fit on the following chart indicates where an organisation should hope to be given its level of familiarity among MPs.
- LU, TfL, LB and to a lesser extent LO and LS are all positioned above the line of best fit
 which indicates they are better regarded than the average given the level of familiarity
 with each organisation among MPs
- LU, TfL and LB in particular occupy a strong position among MPs being both well known and highly regarded. They are held in similar regard to organisations like Channel 4 and Total Politics



Reputation in context – All organisations



Mean favourability

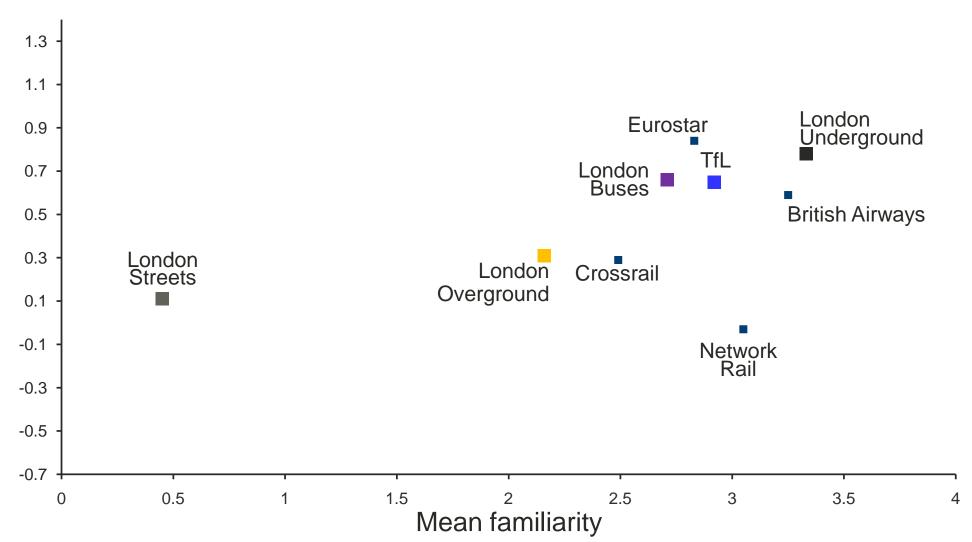




Reputation in context – Key comparators









Advocacy (summary)



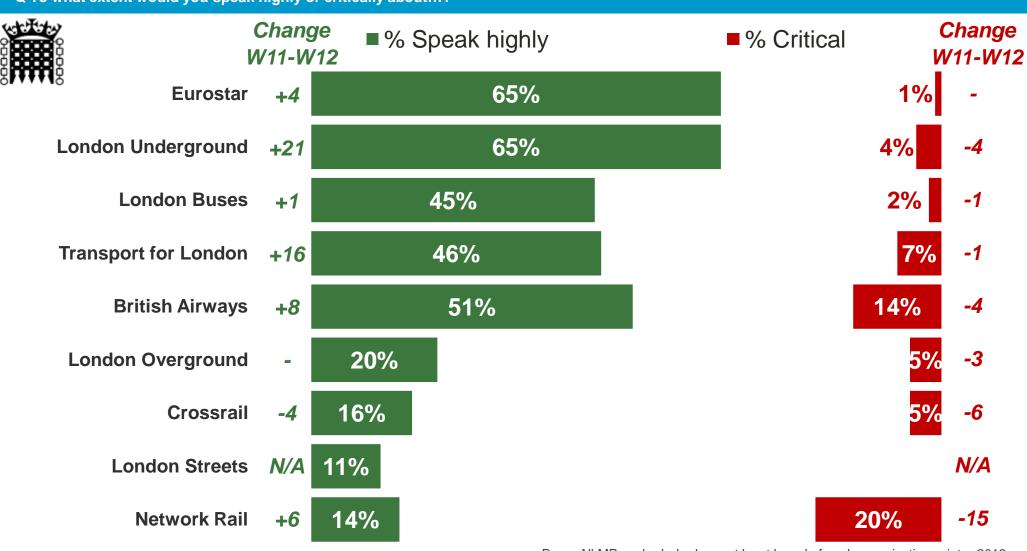
- TfL and LU have made significant improvements in the proportion of MPs willing to speak highly of them
 - LU has clearly made a good impression on MPs between 2011 and 2012. The proportion who would speak highly of it has risen by 21 percentage points to 65%, while the number of active critics remains comfortably low at just four percent
 - This positive shift in opinion has put LU on a par with Eurostar, which retains its position at the top of the table
 - TfL has made similar improvements and is increasingly well regarded in Westminster. While the proportion of critics (7%) has barely changed, more MPs are willing to speak highly of it, with advocacy rising 16 percentage points to 46%
 - MPs' propensity to speak highly of LB has seen little change year on year, though it has retained its position
 - Advocacy levels for LO are also static and remain on a par with the scores attained in winter 2011
 - Again, few MPs are sufficiently familiar with LS to give an opinion of it. Most MPs would be neutral about it if asked. However, the balance of opinion is positive among those who aren't neutral; none would be critical of it



Advocacy – all MPs



Q To what extent would you speak highly or critically about...?



Base: All MPs asked who have at least heard of each organisation, winter 2012



Advocacy - Conservatives vs Labour MPs (summary)



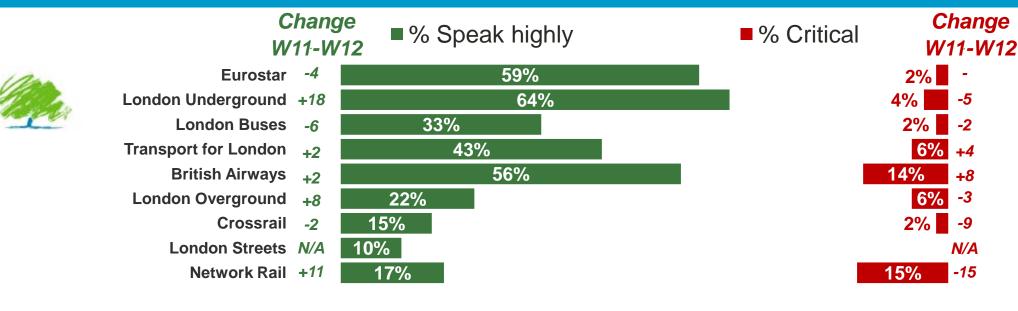
- Labour MPs tend to be more positive to each of the peer organisations this year, and are largely responsible for the improvements in advocacy levels overall
 - The overall improvements for TfL on advocacy are driven by a 32 percentage point jump in advocacy among Labour MPs. Opinion among the Conservatives remains largely the same as in 2011
 - The improvements for LU, however are driven by a uniform upward surge in opinion on both sides of the House



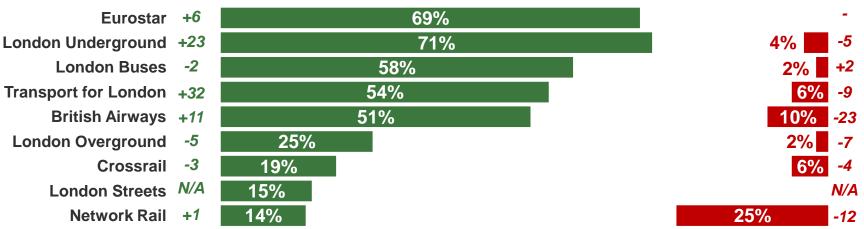
Advocacy – Conservatives vs Labour MPs



Q To what extent would you speak highly or critically about...?









Net advocacy – trends (summary)



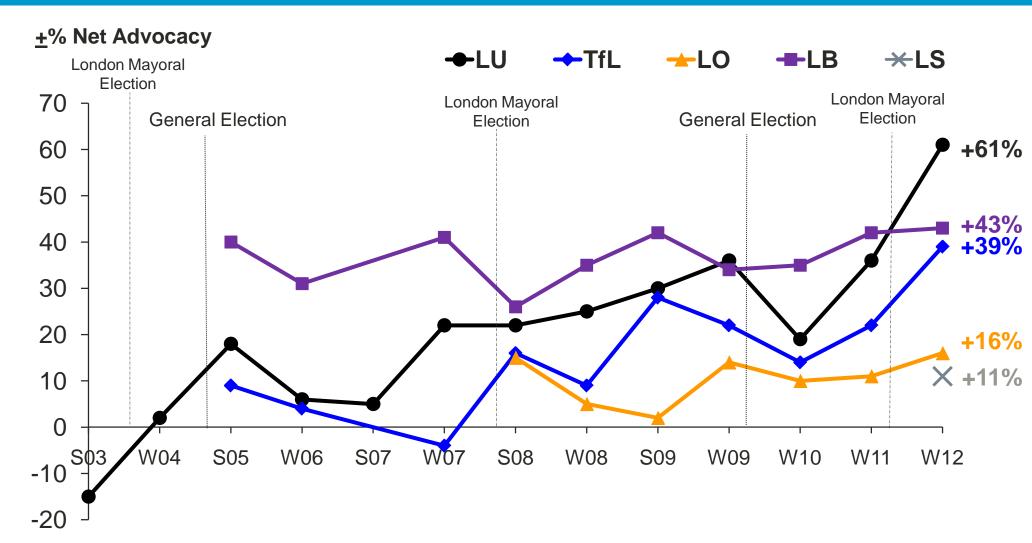
- Net advocacy has significantly improved for TfL and LU over the past two years.
 LB and LO maintain a solid level of advocacy, but have seen little change year-on-year
 - Nonetheless, LB, LO, LU and TfL each attain the highest net advocacy scores yet recorded
 - Net advocacy for LU is up 25 percentage points on 2011 to +61% this year, building on the improvements made last year, following a dip in 2010
 - TfL has made similar gains and a 17 percentage point increase puts it on +39% this year



Advocacy – trends



Q To what extent would you speak highly or critically about...?



Base: All MPs asked who have at least heard of each organisation, each wave





Reputation drivers: What TfL stands for (summary)



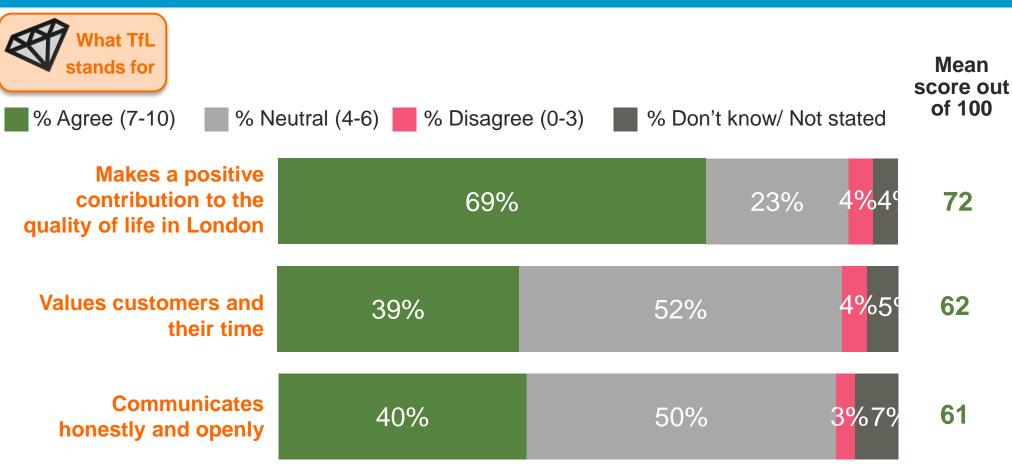
- MPs are positive about TfL's contribution to life in the capital
 - Almost 7 in 10 MPs agree that TfL is making a positive contribution to the quality of life in London. With an overall mean score of 72 out of 100, this ranks as TfL's best performing metric.
 - TfL is performing less well on other core aspects such as valuing customers and their time (62 out of 100) and communicating honestly and openly (61 out of 100). However, on balance, these views are generally positive as around half of MPs express neutral opinions in each of these areas.



Reputation drivers: What TfL stands for



Q To what extent do you feel Transport for London....?



Base: All MPs (103) who have heard of Transport for London, winter 2012



Reputation drivers: Experience (summary)



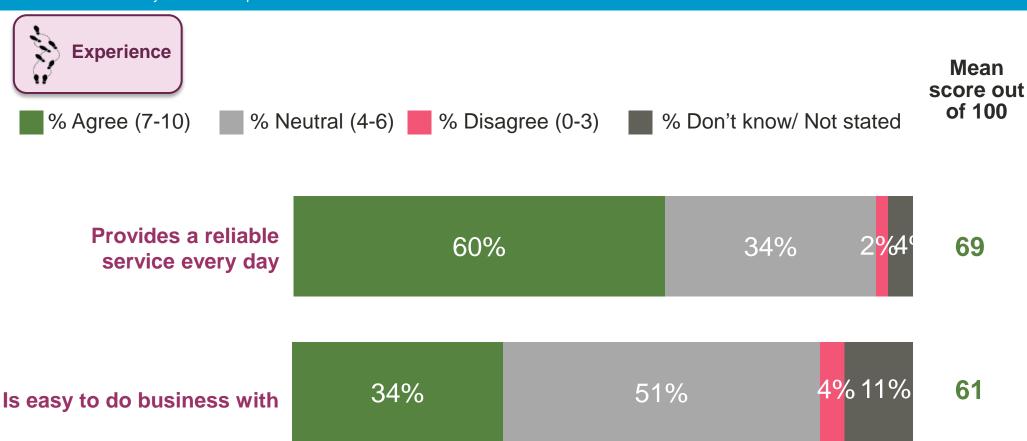
- MPs are undecided on how TfL performs as a business partner, but recognise the reliable service that it provides
 - MPs rate TfL highly when it comes to providing a reliable service every day giving it a mean score of 69 out of 100 overall
 - MPs are less positive that the organisation is easy to do business with, with only one third (34%) agreeing with this statement. This is not to say the remainder of MPs disagree with this statement, but rather they remain undecided. The mean score overall is 61 out of 100.



Reputation drivers: Experience







Base: All MPs (103) who have heard of Transport for London, winter 2012



Reputation drivers: Value (summary)



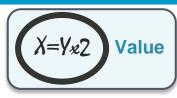
- The majority of MPs remain to be convinced that TfL provides good value for money
 - Just over a third agree that it does (37%), but most are neutral (55%). Encouragingly, very few actively disagree (just three percent) so the mean score overall is 63 out of 100



Reputation drivers: Value



Q To what extent do you feel Transport for London....?



% Agree (7-10)





% Neutral (4-6) % Disagree (0-3)



% Don't know/ Not stated



Provides good value for money







Base: All MPs (103) who have heard of Transport for London, winter 2012

Reputation drivers: Progress & Innovation (summary)



- MPs recognise the investment that TfL is making and the positive effect that this is having on the service overall
 - With over half (55%) giving a score of at least 7 out of 10 for investing to improve the experience of the travelling public, this metric is the second highest ranked metric for TfL with a mean score of 70 out of 100
 - Three in five MPs (59%) describes TfL as an organisation which is on the way up.
 Among the most prominent drivers of this sentiment are the improvements which TfL are delivering to the service and the integrated nature of the public transport network in London.
 - Just over a quarter of those who feel TfL is 'on the way up' mention good customer service as a positive driver
 - Also contributing to perceptions that TfL is 'on the way up' is its use of new IT and communication methods. A small number of MPs also spontaneously mention TfL's good management of the Olympics as another reason for positive momentum.
 - TfL is clearly regarded by many MPs as an important part of the fabric of the city and a major part of many people's daily lives. The key issues for TfL are being able to continue investing in and modernising the network whilst maintaining fare prices and good customer relations



Reputation drivers: Progress & Innovation



Q Based on your experience and perceptions, which of the following statements best describes Transport for London?



% Agree (7-10)

% Neutral (4-6) % Disagree (0-3)

% Don't know/ Not stated

Mean score out of 100

Is investing to improve the experience of the travelling public in London



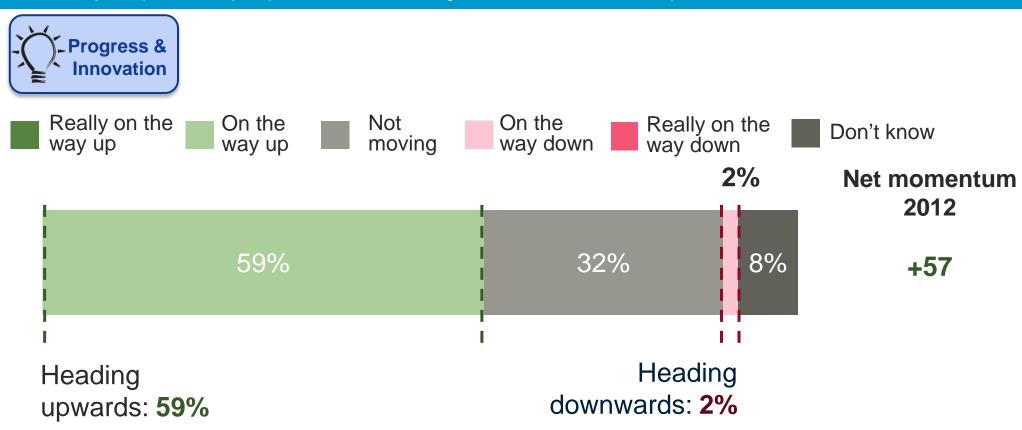
Base: All MPs (103) who have heard of Transport for London, winter 2012



Reputation drivers: Momentum



Q Based on your experience and perceptions, which of the following statements best describes Transport for London?



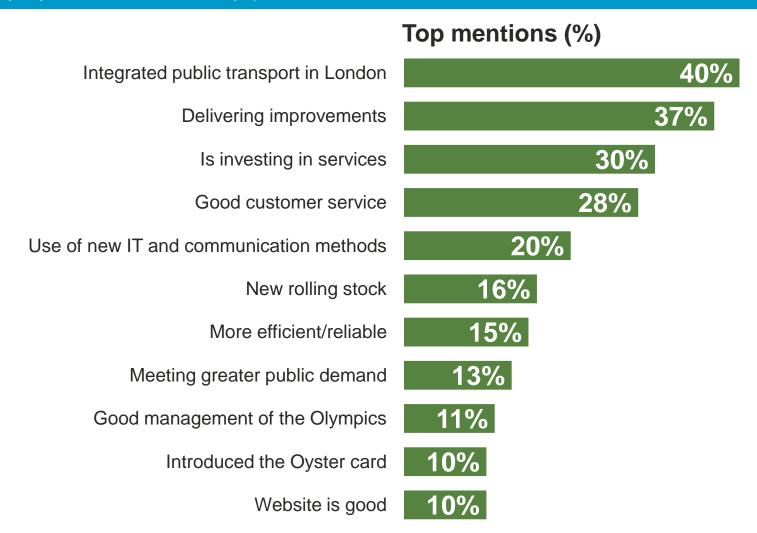
Base: All MPs (103) who have heard of Transport for London, winter 2012



Reputation drivers: Sources of momentum



Q Why do you think that TfL is on the way up?



Base: All MPs (58) who feel that TfL is on the way up, winter 2012



Momentum: Comments



Q Why do you think that TfL is on the way up?

"Because of the investment into the system, they shift an incredible amount of people every day and they do that incredibly well. Customer service, on the whole, is very good and that didn't used to be the case".

Conservative Backbencher

"The way they delivered across the Olympics is a pretty significant step forward and they are clearly working hard to get more integrated transport, so that is beginning to happen".

Lib Dem Backbencher

"We are seeing greater efficiency in the transport network for London, moving positively, moving efficiently and improving services, so it is moving in the right direction".

Labour Shadow Minister

"Their communication is good, they are using modern technology and communication methods, I get an email if there is a problem with transport somewhere. The transport network is generally improving and is a more pleasant experience".

Conservative Backbencher

"They raised their game for the Olympics and I hope that is a lasting improvement and that has paid off. Rolling stock is better, reliability is better, the whole experience of using it is better".

Conservative Backbencher

"Paradoxically it is getting easier to get about London. Some of the road plans cause problems at the time but on the whole it has been beneficial. It is methodically planned and well run".

Labour Backbencher

"London has got a good transport system which is not standing still but improving, both in terms of its capital assets and in terms of service delivered".

Liberal Democrat Backbencher

"The website is pretty good, the Congestion Charge seems to work, the Tube network is being invested in. I have some doubts on the buses, but broadly the transport in London is so much better than it is anywhere else".

Labour Shadow Minister



Reputation drivers: Trust (summary)



- Four in ten MPs give TfL a score of at least 7 out of 10 for 'an organisation that they can trust'
 - Around (52%) are neutral on this issue, but only a handful disagree that TfL is trustworthy (4%), suggesting that there is plenty of scope to win over those who are currently undecided.
 - This compares with two-thirds of MPs who either strongly or tend to agree that LU* is a trustworthy organisation.



Reputation drivers: Trust



Q To what extent do you feel Transport for London....?



% Agree (7-10)

% Neutral (4-6)

% Disagree (0-3)

% Don't know/ Not stated

Mean score out of 100

Is an organisation I can trust



62

Base: All MPs (103), Conservative MPs (43), Labour MPs (48) who have heard of Transport for London, winter 2012





Building LU advocacy



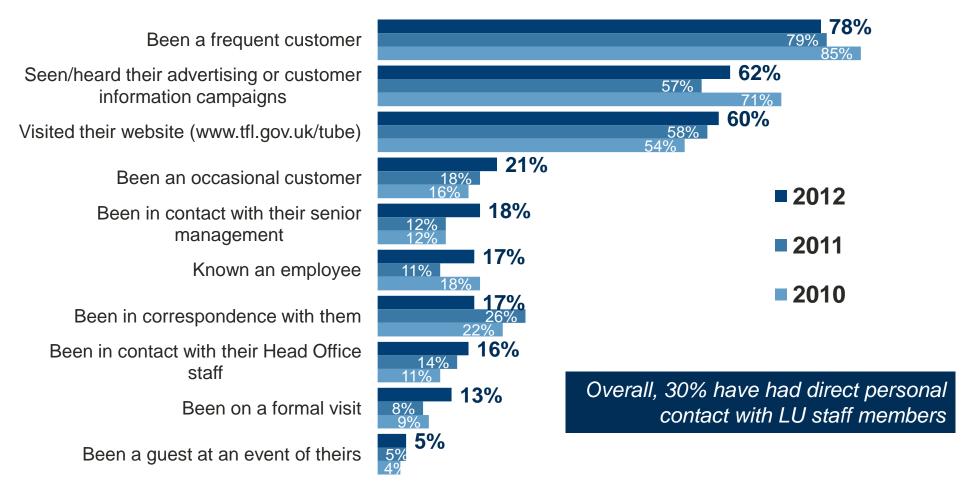
- MPs are already very positive about London Underground
 - When asked about their experiences of the organisation over the last three years, MPs tend to respond from a customer point of view rather than a ministerial one. They are much more likely to have been a regular user of the network or have seen its advertising than to have had any correspondence with its staff or attended one of its events. These findings have remained fairly consistent since 2010, suggesting perhaps that more steps need to be taken to engage professionally with MPs to help further build advocacy towards LU



Experience of LU



Q Thinking of your experience of London Underground, which of these applies to you? Within the last 3 years I have...



Base: All MPs (103) who have heard of London Underground, winter 2012



Building LU advocacy



Areas for improvement for London Underground

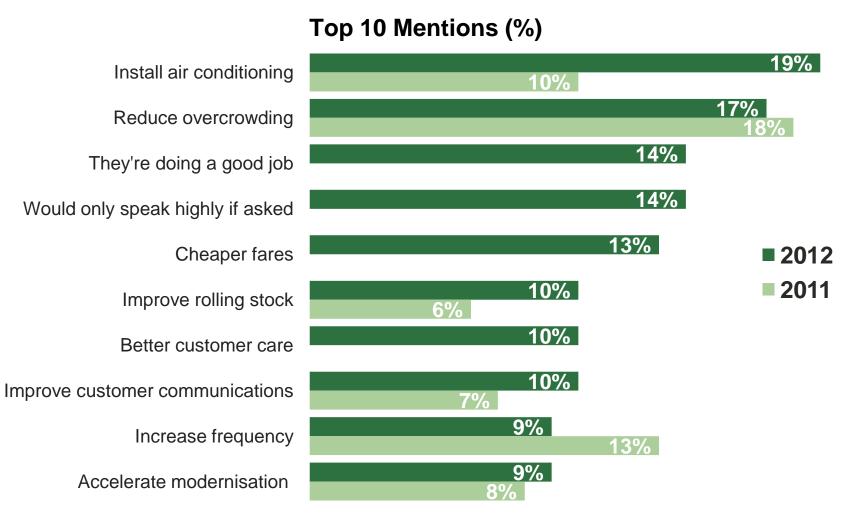
- Two thirds (65%) of MPs would speak highly of LU, with just four percent critical. Whilst this is a very positive outlook for LU, there is room for improvement. For those who would already speak highly of the organisation, installing air conditioning units, taking steps to reduce overcrowding on the Underground and reducing travel fares would go a considerable way towards improving this opinion further
- Among those MPs who are neutral or critical towards LU, reducing fares and overcrowding are also considered to be key ways to make them think more highly of the organisation. For this group the reliability of the service, station cleanliness and industrial relations also require improvement if they are to speak more highly of the organisation in the future



Converting MPs to advocates of LU



Q You said you would speak highly of London Underground if someone asked your opinion. What would they need to do to impress you sufficiently for you to speak highly of them without being asked?



Base: All MPs who would speak highly of London Underground if asked (57), winter 2012



Converting MPs to advocates of LU: Comments



Q You said you would be speak highly of LU if someone asked your opinion. What would they need to do to impress you sufficiently for you to speak highly of them without being asked?

"They would need to address the issues of overcrowding and the heat in summer. It is not always pleasant in the summer to be on the Underground, especially at peak times".

Conservative Backbencher

"To show the investment they are making, their plans for the future. Just contact us. Most MPs are individual regular users of London Underground so it would be in their interests to let us know their plans for the future".

Labour Shadow Minister

"I base all my discussions on it as a customer, so I would need to hear more about what they are doing and why they feel that I should be singing their praises".

Liberal Democrat Backbencher

"Reduce fares and increase capacity. I might need to know more details about them and the size of their function and how many people they transport every day, so more facts".

Labour Backbencher

"Provide a better service. It is a service that I use myself, so cleaner, better trains, faster journey times, fewer disruptions".

Conservative Backbencher

"The big challenge is tackling rush hour crowds, but it is also time for a 24 hr service, even if it is a very much reduced service. It isn't sustainable for London as a world city to not now have 24hr Tube coverage".

Liberal Democrat Backbencher

"Put their staff on customer relations exercises. I like London Underground despite the staff. If they were able to communicate and have better customer relations".

Labour Backbencher

"If no one asked me about it why would I venture an opinion on London Underground. They could make it less hot in summer, but on the whole I think London Underground is great".

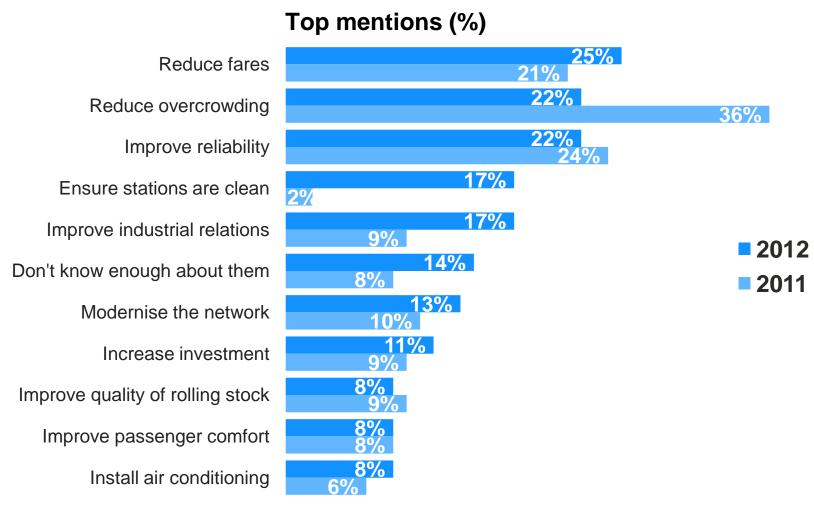
Conservative Minister



Winning over those who are neutral towards LU



Q You said you would be neutral towards London Underground if someone asked your opinion. What would they need to do to impress you sufficiently for you to speak highly of them?



Base: All MPs (32) who would be neutral towards London Underground if asked, winter 2012



87

Winning over those neutral towards LU: Comments



Q You said you would be neutral towards London Underground if someone asked your opinion. What would they need to do to impress you sufficiently for you to speak highly of them if someone asked your opinion?

"Improve the reliability and the overall customer experience, air conditioning would be a plus in hot weather. In hard times they need to watch the Tube price rises".

Conservative Backbencher

"As a result of having some really good journeys and some really bad journeys. Like most people if they were always running on time and always immaculately clean I would probably start being more positive".

Liberal Democrat Minister

"It needs a lot of investment, the tunnels are quite small. The level of investment that would be needed is vast, but if you abroad you see the double-decker trains which are a lot more effective. It is a very overburdened system and I can't see that changing, particularly".

Labour Shadow Minister

"They will need to reform and sort out their industrial relations and stop constantly running into arguments with the Mayor's office who is trying to produce value for money for people".

Conservative Backbencher

"They have to improve the cost but the real thing they would have to do is improve the quality of the whole experience. So on the level of something like Hong Kong underground, the London Underground is too old, too smelly and too crowded".

Conservative Backbencher

"They have to build themselves up, I think Londoners take it for granted and don't realise how good it is. They need to point out their good points. There wasn't one complaint in the Olympics about the Underground, none at all, that says a lot about them as well".

Labour Backbencher

"Modernise and transform, which they are doing slowly, perhaps I will be convinced when they get there".

Liberal Democrat Backbencher

"Ensure that the prices are kept to an affordable limit, so people can use the Underground. It is a necessity in London, you can't do without public transport and they take advantage of that fact by increasing their prices too often for my liking".

Labour Backbencher



Winning over critics of LU: Comments



Q You said you would be critical towards London Underground if someone asked your opinion. What would they need to do to impress you sufficiently for you to speak highly of them if someone asked your opinion?

"Generally look at improving the reliability of the network, fix the temperature, tube lines that are boiling hot even in winter. You would imagine some of these things are not beyond the will of man and the will of science to overcome".

Conservative Backbencher

"Be much better, more trains, cooler trains, much easier to get around, in terms of directions, walking around when it is crowded".

Conservative Backbencher

"They need to involve themselves in communication more. They just tend to rely on the Select Committee and the government to promote their cause to a greater extent, I am talking about Boris, and that isn't necessarily in their best interests. Their communications are not even average and they need to improve. In all the years I have been travelling on the Underground I haven't seen anybody surveyed".

Labour Backbencher

"They would need to make sure they had decent modern capacity, particularly at peak times, so people were not crammed in like cattle trucks and go out of their way to avoid using the service and they should run a bit later in a modern capital, rather than closing at midnight".

Labour Backbencher



LU's strengths & weaknesses

LU's strengths



LU provides an important service to Londoners

- MPs continue to regard the reliable and efficient service that LU provides, along with its comprehensive network, as its main strengths. LU is widely acknowledged as an integral part of the London landscape and an essential part of the city's infrastructure
- LU is increasingly regarded as the best way of getting around London, with nearly a third (31%) commending its ability to move large volumes of people around the capital, up 26 percentage points since winter 2011. Travel on the Underground is increasingly being seen as an affordable way of getting around the city and improvements are also clearly being made when it comes to service and the upkeep of its stations and trains

"They are there! The fact it exists as a mass transit system is nothing short of miraculous really. Line upgrades, good drivers, fast services, punctual services, clean and comfy new carriages, pretty helpful staff on the stations, quite good communications"

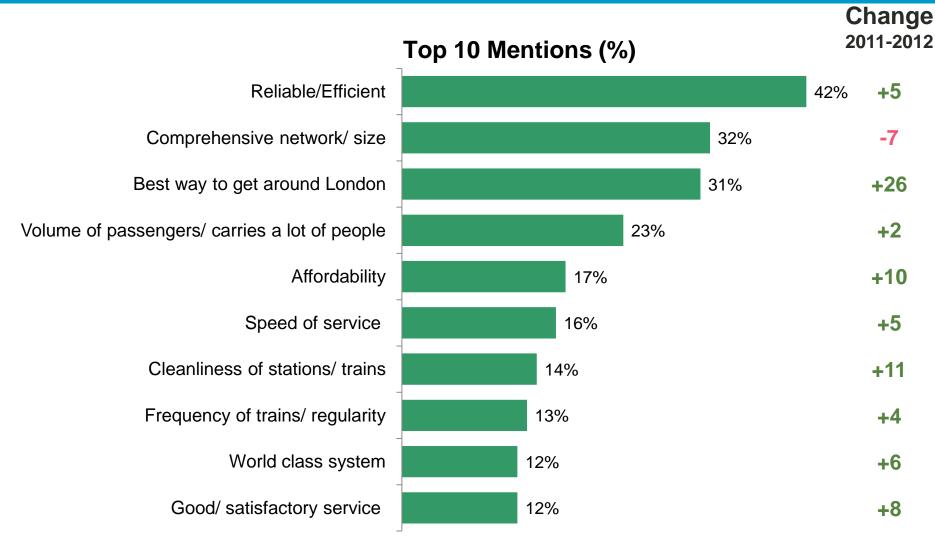
Labour Shadow Minister



LU's key strengths



What would you say are London Underground's major strengths?



Base: All MPs (103) who have heard of London Underground, winter 2012



LU's strengths: Comments



What would you say are London Underground's major strengths?

"It provides an efficient system of transportation within one of the largest and busiest cities in the world and does so relatively efficiently and effectively. They have made tremendous progress in cleaning up the Underground and having more staff available to assist with the operation of the Oyster card system, so there are a range of things they have done to bring that about".

Conservative Minister

"A captive market, it is a must use system for getting round central London. A legacy of investment in infrastructure over the last 100 years...".

Liberal Democrat Backbencher

"It has an integrated system, it moves large amounts of people in a large conurbation in a very effective and efficient way. It is relatively cheap, it is reliable and it is developing further and expanding its operations".

Labour Backbencher

"Their success in moving vast numbers of people around London fairly quickly and continuing improvement and modernisation of the Underground system".

Liberal Democrat Backbencher

"It is the quickest way to get round London and it is quite cheap compared to taxis. It is safe compared to using a bicycle and if you don't know where you are going it is a lot easier to use than buses which can be very confusing to people who live in the North of England like me. They are generally reliable and it would be my first choice of means of getting around London".

Conservative Minister

"Actually the number of people it carries around London every day. The congestion is now so bad that I can't remember the last time I got a cab, I still get the Tube a lot because it is an easy way to get around London. They are quite regular, the trains, you don't have to wait that long for a train".

Labour Shadow Minister

"They are a major part of the capital city's infrastructure, they provide us with connectivity, particularly to my constituency, which is very important, because a lot of people who work in London are commuters. It's a well established transport system and it is relatively easy to use".

Conservative Backbencher



LU's weaknesses



- LU's weaknesses are consistent with last year
 - There has been no change since last year in the perceived weaknesses of LU, which continue to centre around overcrowding and its perceived inability to cope with the increasing demands placed on the network. The price of travel tickets along with the unreliability of the service and the often hot, uncomfortable conditions that many commuters experience are also cited as major weaknesses

"The prices are getting a bit too high but there are few alternatives. Coping with the demand at peak times and it is far too hot down there in the summer".

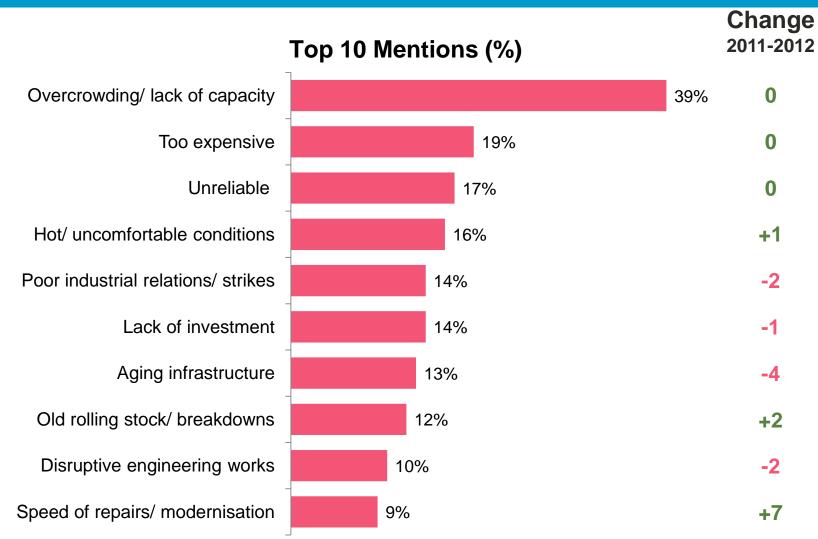
Conservative Backbencher



LU's key weaknesses



What would you say are London Underground's major weaknesses?



Base: All MPs (103), Conservative MPs (43), Labour MPs (48) who have heard of London Underground, winter 2012



LU's weaknesses: Comments



What would you say are London Underground's major weaknesses?

"Crowded trains, lack of air conditioning and engineering works which close the network at weekends".

Conservative Minister

"It is old and decrepit and hasn't had enough investment for decades and it looks very shabby in comparison to other capital cities".

Liberal Democrat Backbencher

"When it doesn't work it doesn't work badly. I am on the Northern Line where sometimes there can be problems, and frequency of trains not working. Cost of tickets, it is very expensive".

Labour Shadow Minister

"Their tickets for people who don't use the Oyster card are too expensive, they should be doing something to support visitors who are not from London getting the same priced travel as you can get from an Oyster card".

Conservative Backbencher

"Capacity problems at peak times, particularly when you go to a main line station and not be able to go into the Tube. General customer experience, we had air conditioning during the Olympics, why didn't we have that before? Frequency of breakdowns and delays".

Conservative Backbencher

"The age of quite a lot of the infrastructure they are operating, difficult labour relations, which can inhibit modernisation and inhibit more economical ways of operating. A constantly growing number of people that want to use the system".

Liberal Democrat Backbencher

"Lack of capacity of passengers, a scrum sometimes to get on trains at peak times. The fact that at weekends quite often there are restrictions on the service and closures of whole lines. The fact it doesn't operate 24hrs a day which the New York Metro does".

Labour Shadow Minister



Investment in LU

Investment in LU

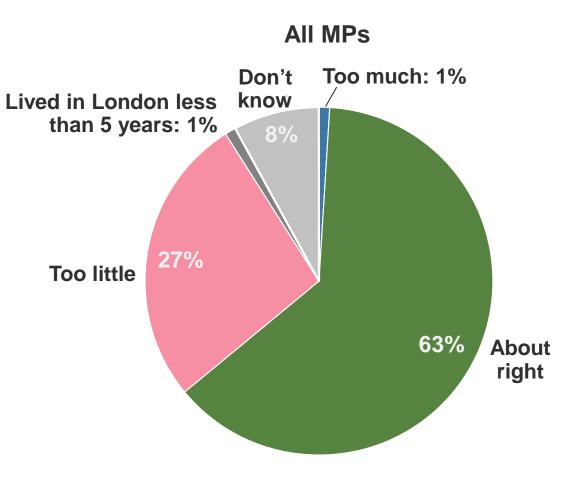


- A high proportion of MPs feel that the amount of investment in LU over the past five years has been adequate.
 - Two thirds (63%) feel that the amount of spending on the network has been about right, with a quarter (27%) saying too little has been invested. Overall, this is consistent with opinions expressed last winter
 - Views on investment in LU have remained stable among Labour MPs over the last year, with just over half (54%) saying that levels are about right and a third (39%) who feel that more investment is needed. Whilst Conservatives continue to be more satisfied with the current levels of investment than their Labour counterparts, there has been a slight sway in opinion among the Tories, with more now saying they feel there is too little investment in London Underground (up 11 percentage points since last winter to 17%)
 - Among those MPs who feel that investment levels are about right, there is an
 understanding of the difficulties faced by LU in the current economic climate in
 terms of acquiring extra funds. Steady levels of improvements in the network and a
 perceived increase in reliability of the service are cited as reasons for feeling that
 current levels of investment are sufficient. For those who feel that more investment
 is required, the apparent aging infrastructure and rolling stock are causes for
 concern. However, MPs generally recognise that the upkeep and modernisation of
 the entire network is a large-scale operation

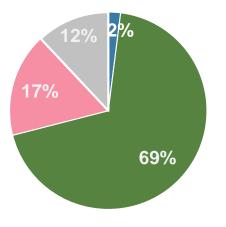
Satisfaction with recent levels of investment in LU



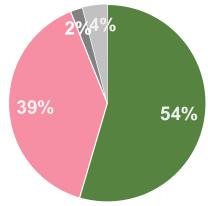
How would you describe the level of investment in London Underground over the past five years?



Conservative MPs



Labour MPs



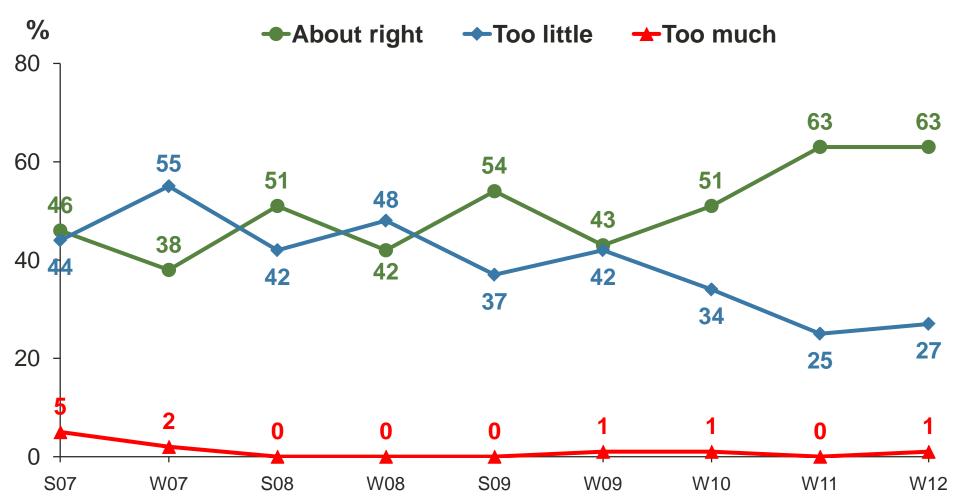
Base: All MPs (103), Conservative MPs (43), Labour MPs (48) who have heard of London Underground, winter 2012



Satisfaction with recent levels of investment in LU - trends



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



Base: All MPs who have heard of London Underground, 2007-2012



Investment in LU - comments



Why do you say that there has been investment in London Underground?

"(about right) The investment is dependent on the ability of the City to pay, it is a constant process, and I have not witnessed any significant failures of the service, but I haven't seen any constant improvements to stations, it is steady process".

Conservative Minister

"(about right) If you try and put too much money into it you disrupt the system too much. You can't do it all at once and it has been about right. There has been a huge amount of work being done, but it is a balance between shutting the system down while you do the work and keeping the system going whilst you do improvements and I think they have got it right".

Conservative Minister

"(about right) The service has become more reliable and there is a limit to how much can be spent in these economic times. The impression I get from talking to other MPs is that most London MPs feel fairly satisfied".

Labour Shadow Minister

"(about right) There is obviously more they can invest in but it is very expensive stuff under the ground and they are investing significantly but it is such a big network that they will never get it all done, and the only way they could do that would be to create more dislocation or get themselves into some very exposed financial relationship".

Liberal Democrat Backbencher

"(too little) Because the infrastructure is so old that major improvement is needed. We are beginning to see the sharp contrast between places where they have successfully invested and the places that still need it, or the rolling stock that still needs it. The system could always use much more investment, because it is large and it is so heavily used".

Liberal Democrat Backbencher

"(too little) Significant improvements could be made in terms of the rolling stock, in terms of extending lines a bit more quickly than is being done or considered. There are improvements to several lines which are running late. All of these could have been improved if there was more coming through TfL and the Mayor's office".

Labour Shadow Minister



Investment in LU



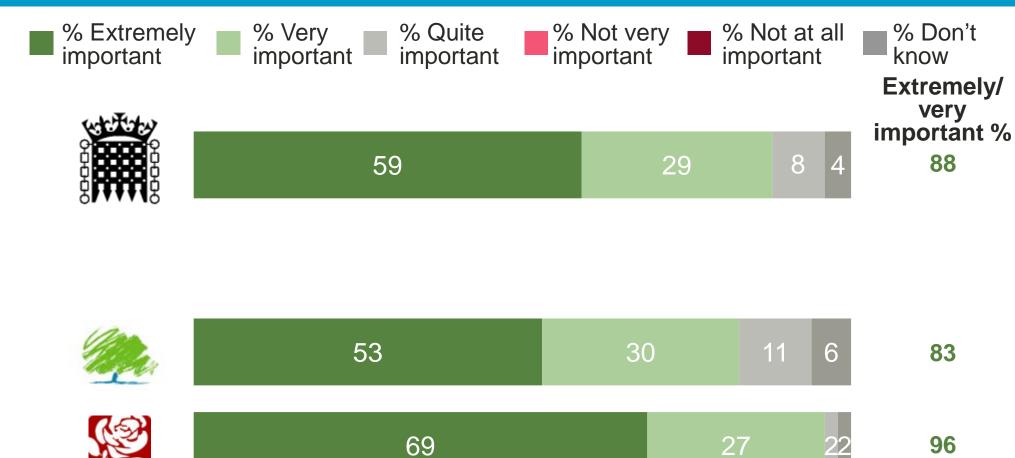
- Maintaining the planned level of investment in the underground is pivotal to London's economic recovery
 - Maintaining current investment levels in LU is seen as important to London's future with almost nine in ten MPs overall saying it is either 'extremely' or 'very important', rising to 96% of Labour MPs
 - Four in five MPs overall believe continuing to improve the service offered by LU is extremely or very important to the Capital's economic recovery. Labour MPs are slightly more likely to agree with this sentiment compared to their Conservative counterparts, however, MPs from both parties are more likely to say it is 'extremely' or 'very' important compared to back in 2009

102

Transport for London

Maintaining the planned level of investment in LU

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



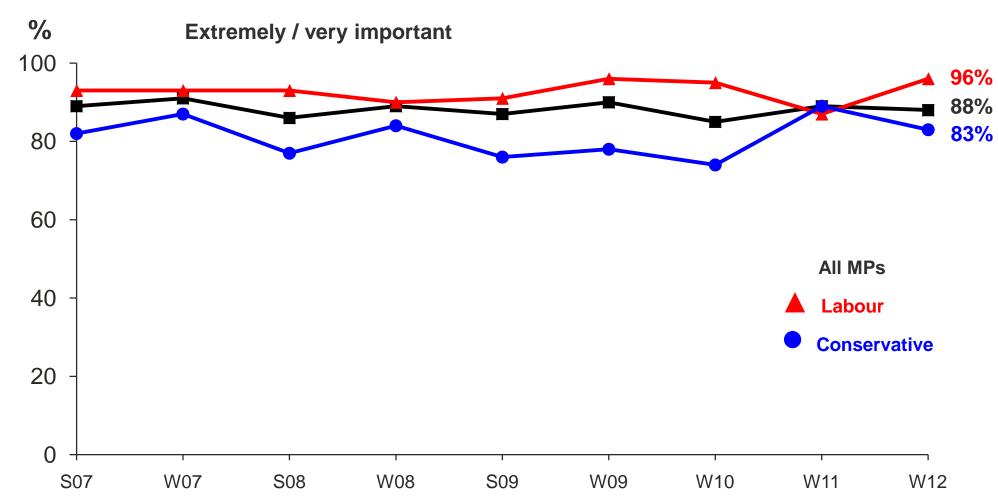
Base: All MPs (103), Conservative MPs (43), Labour MPs (48) who have heard of London Underground, winter 2012



Maintaining the planned level of investment in LU - trends



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



Base: All MPs who have heard of London Underground, 2007-2012

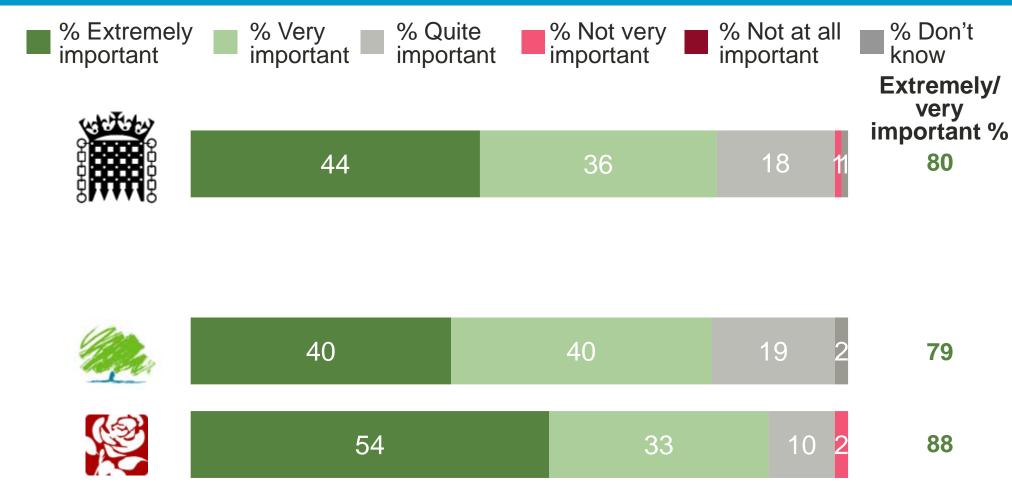


104

Transport for London

LU investment and London's economic recovery

How important do you think that continuing to improve the service offered by London Underground will be to London's economic recovery?



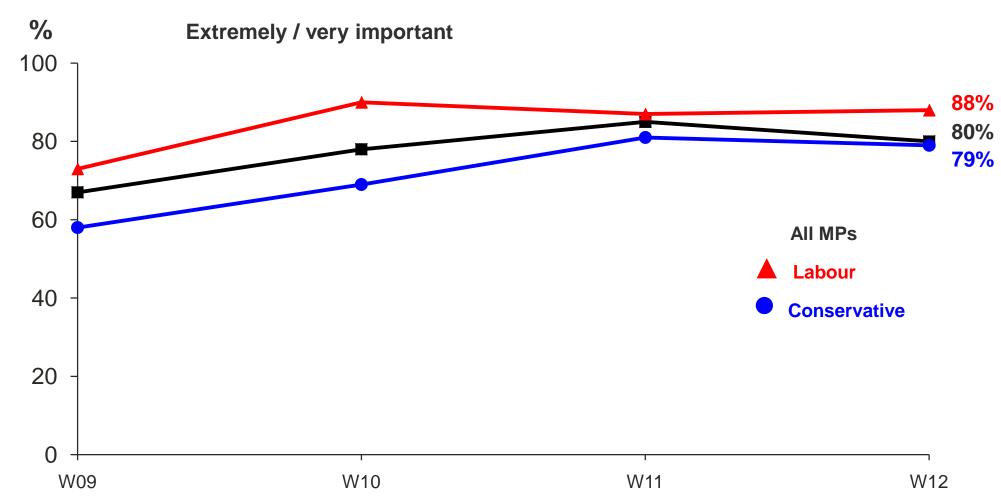
Base: All MPs (103), Conservative MPs (43), Labour MPs (48) who have heard of London Underground, winter 2012



LU investment and London's economic recovery - trends



How important do you think that continuing to improve the service offered by London Underground will be to London's economic recovery?



Base: All MPs who have heard of London Underground, 2009-2012



LU's reputation drivers

LU's reputation drivers - What LU stands for (summary)



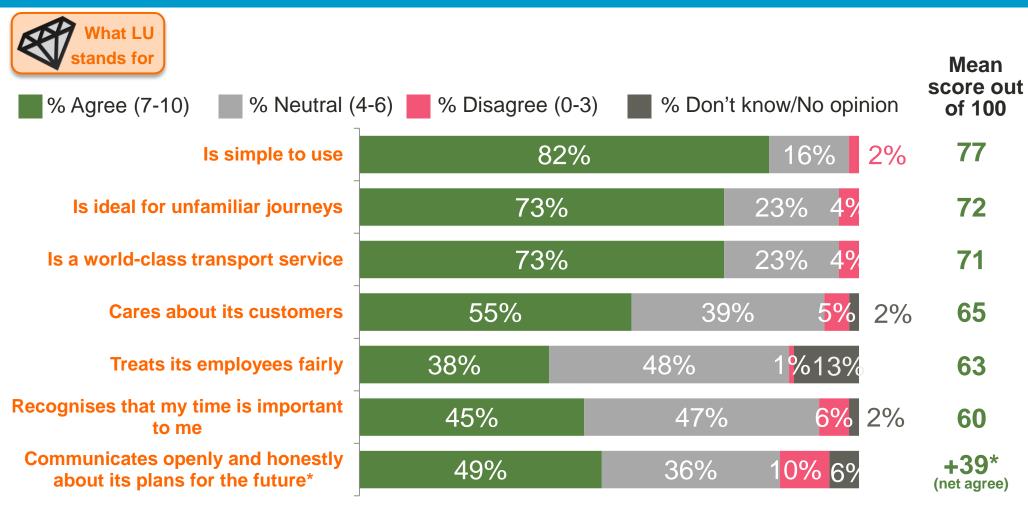
- Being 'simple to use' and 'ideal for unfamiliar journeys' continues to be LU's key strengths among MPs
 - Over four in five (82%) give LU a score of at least 7 out of 10 for being simple to use. Almost three-quarters (73%) give the same rating for LU being ideal for unfamiliar journeys. Both metrics have improved after a slight dip in 2010
- MPs are more likely to believe LU is a world class service
 - Perceptions of LU being a world class service have improved slightly by 4 points from 2011 giving a mean score of 71 out of 100. MPs are now much more likely to agree with this compared to 2008 (61 in 2008)
 - In line with this, improvements have also been seen on the following metrics since 2008:
 - Valuing time (+10 points)
 - Cares for its customers (+7 points)
 - Fair treatment of employees (+6 points)
- An area of relative weakness for LU on this reputation driver is communicating openly and honestly about its plans for the future
 - Half of MPs agree that LU's communications are open and honest, one in ten disagree with this while the remainder either say 'don't know' or give a neutral opinion



Reputation drivers: What LU stands for



Q To what extent do you feel London Underground....?



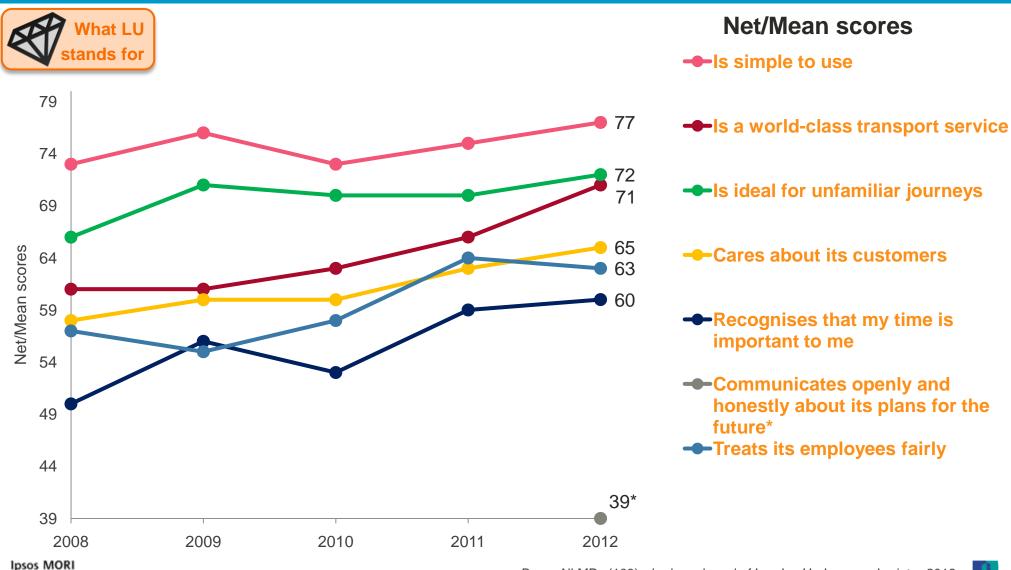
Base: All MPs (103) who have heard of London Underground, winter 2012



What LU stands for: trends



Q To what extent do you feel London Underground....?



* This is a net score from a 5 point scale

Reputation Centre

LU's reputation drivers – Experience (summary)



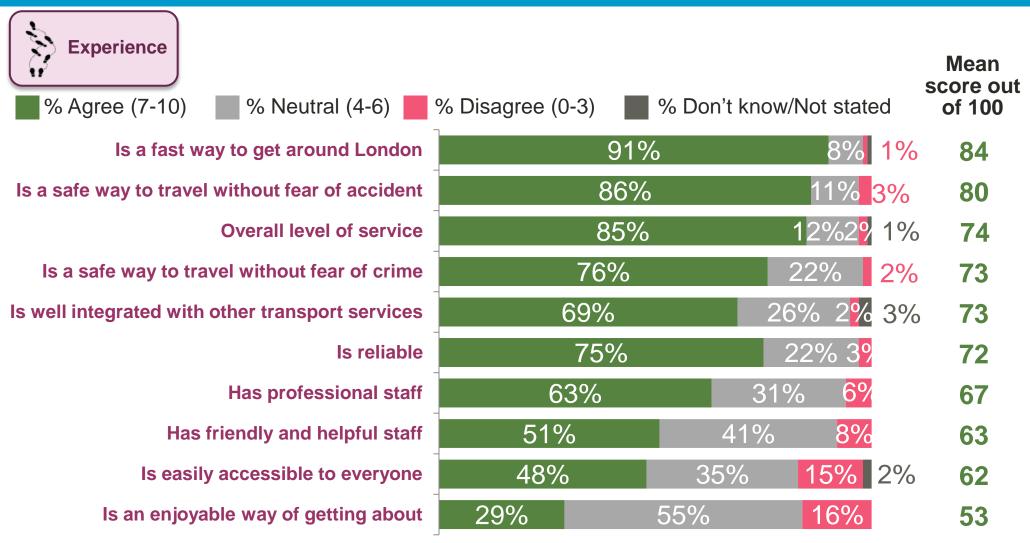
- LU scores a mean score of over 70 out of 100 on 6 out of 10 of the metrics which come under this reputation driver
- LU continues to be seen as providing a good service, which is efficient and safe.
 Perceptions of LU's overall level of service have improved since 2008
 - As in previous years, MPs rate LU very highly for being a fast and safe way to get around London (84 out of 100 and 80 out of 100 respectively).
 - MPs give LU an average rating of 74 out of 100 for the overall level of service, this has improved by 7 points since 2008. Most MPs feel that LU's service levels have stayed the same over the last year, though a third feel it has improved
 - Other metrics which have seen a notable improvement since 2008 include:
 - Reliability (up 9 points)
 - Having helpful and friendly staff, being easily accessible to everyone (both up 8 points)
 - Well integrated with other transport services , having professional staff (up 7 points)
- Being an enjoyable way of getting continue to be areas of relative weakness
 - MPs give LU a mean score of 53 out of 100 for this metric. This has shown a slight improvement since 2008 (+4 points) but remains LU's lowest performing metrics



Reputation drivers: Experience



Q To what extent do you feel London Underground....?



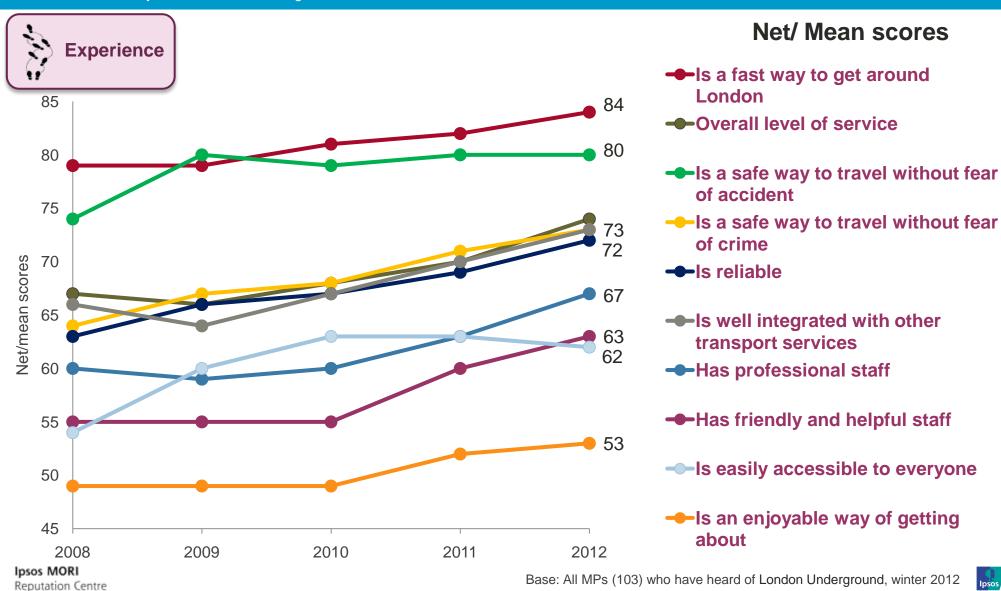
Base: All MPs (103) who have heard of London Underground, winter 2012



Experience: trends



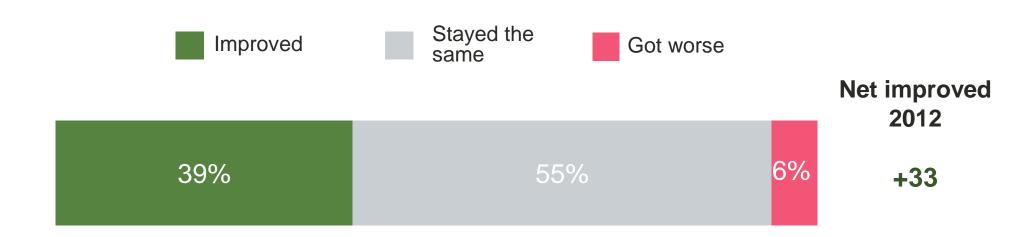
Q To what extent do you feel London Underground....?



Changes to quality of service



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



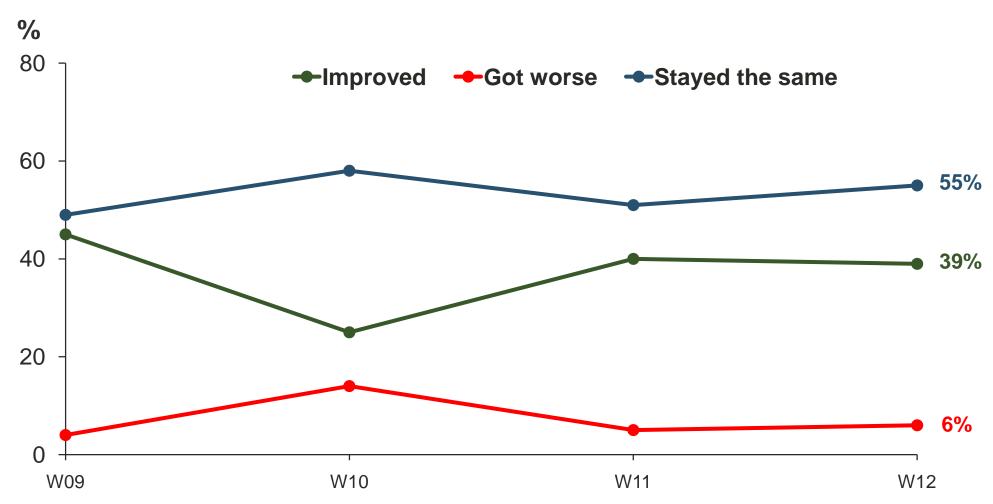
Base: All MPs (103) who have heard of London Underground, winter 2012



Changes to quality of service - trends



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



Base: All MPs who have heard of London Underground, 2009-2012



LU's reputation drivers – Value (summary)



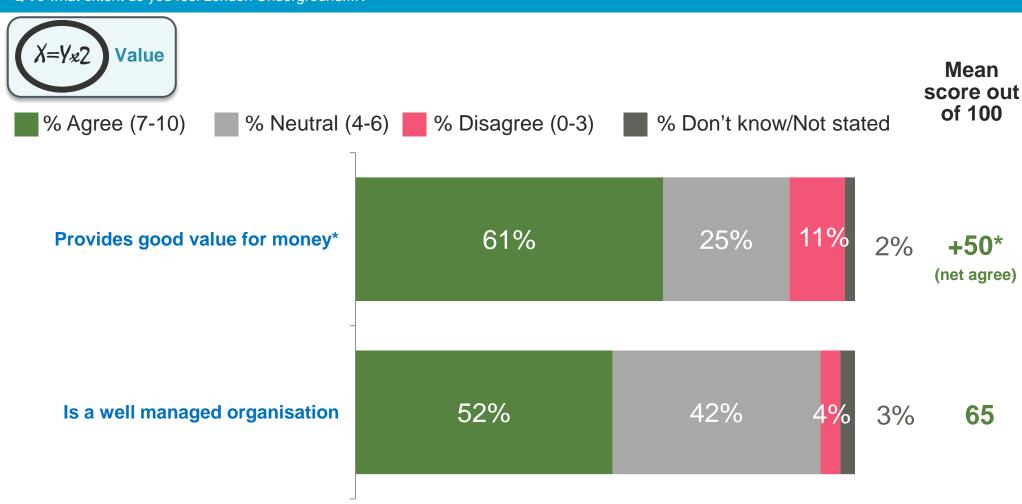
- On value, just over half of MPs perceive LU to be a well-managed organisation and three in five agree that it offers value for money
 - MPs give LU a mean score of 65 out 100 for being a well managed organisation.
 Compared with other metrics (such as reliability or overall level of service), this is an area where LU has seen slower progress with the mean score improving by 6 points since 2008
 - Many MPs agree that LU provides good value for money (61% either strongly or tend to agree), though one in ten disagrees



Reputation drivers: Value



Q To what extent do you feel London Underground....?

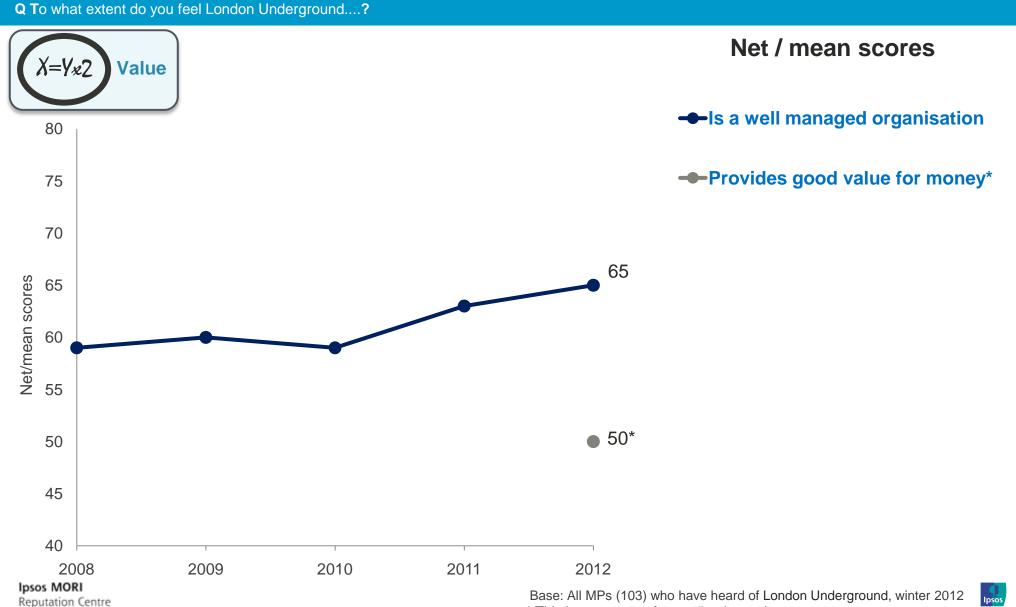


Base: All MPs (103) who have heard of London Underground, winter 2012



Value: trends







* This is a net score from a 5 point scale

LU's reputation drivers - Progress & Innovation (summary)



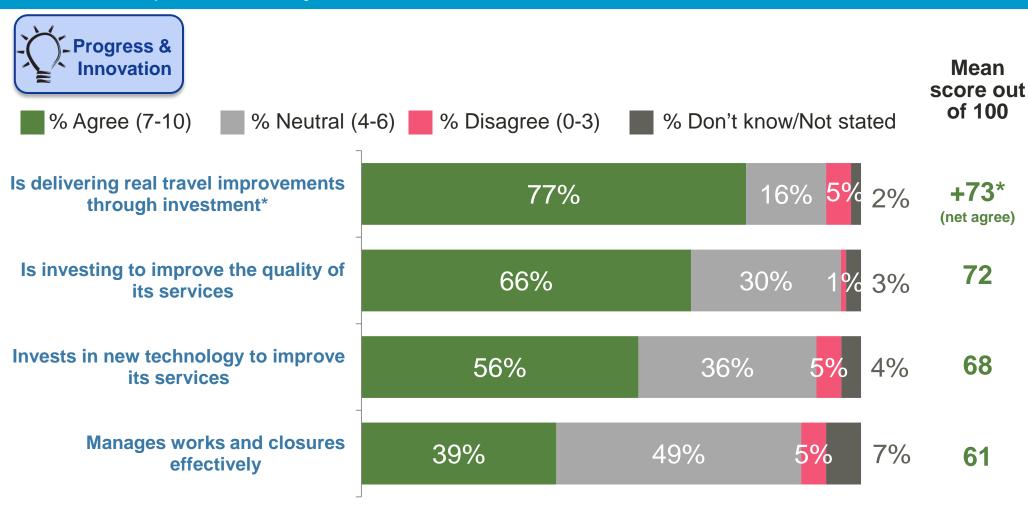
- There is widespread recognition that investments are being made and a clear sense that LU is moving in the right direction
 - There are high levels of recognition among MPs that LU is delivering real travel improvements through investment (77% agree, up 3 percentage points since 2011) and that it is investing to improve the quality of its services (mean score is 72 out of 100)
 - MPs give a mean score of 61 out of 100 for LU's management of works and closures. This is one of LU's relative weaknesses, but ratings on this metric have improved by 9 points since 2010 when it was first asked
 - MPs are positive about the direction LU is moving in seven in ten (69%) say that
 LU is on the way up and only a handful feel that it is on the way down. Around a quarter of MPs feel that it is not moving (23%)



Reputation drivers: Progress & Innovation



Q To what extent do you feel London Underground....?



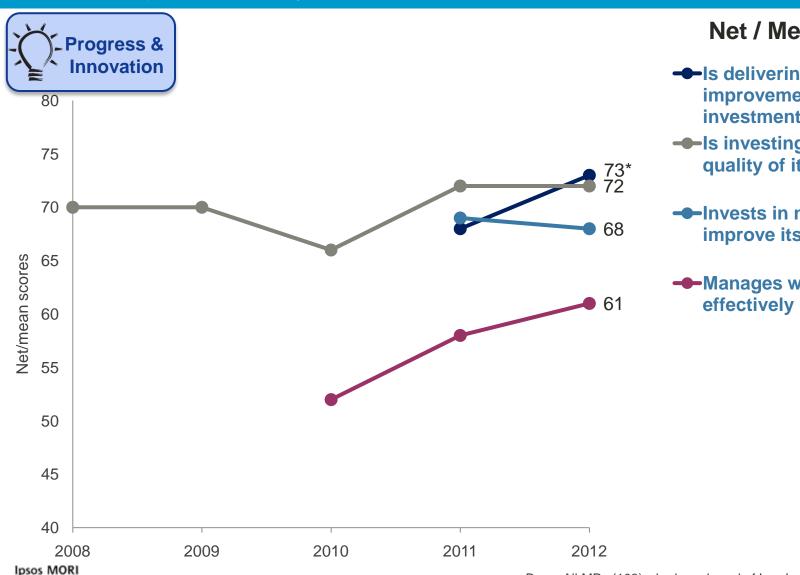
Base: All MPs (103) who have heard of London Underground, winter 2012



Progress & innovation: trends



Q To what extent do you feel London Underground....?



Net / Mean scores

- Is delivering real transport improvements through investment*
- Is investing to improve the quality of its services
- Invests in new technology to improve its services
- Manages works and closures effectively

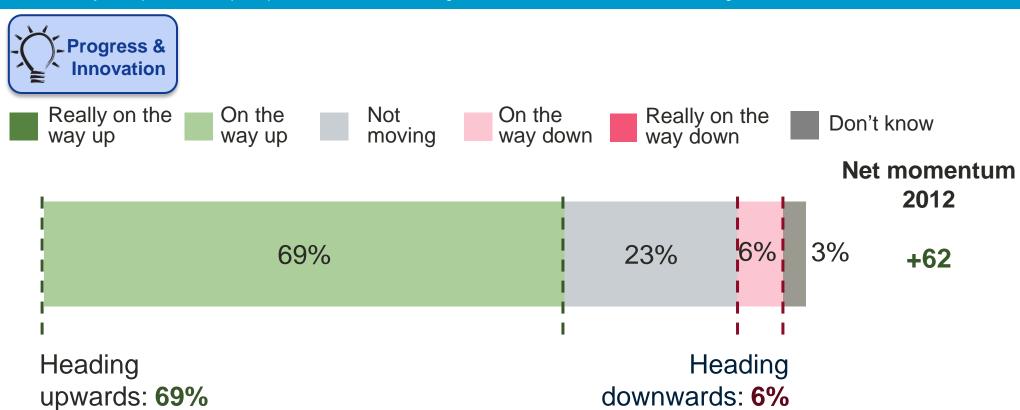


Reputation Centre

Reputation drivers: Momentum



Q Based on your experience and perceptions, which of the following statements best describes London Underground?...?



Base: All MPs (103) who have heard of London Underground, winter 2012



LU's reputation drivers – Trust (summary)



There is a high degree of trust in LU

- Two thirds (67%) of MPs agree that LU is a company they can trust. While only a small minority (6%) disagree, around a quarter are neutral and yet to be won over.
- However, trust in LU* compares somewhat favourably to TfL or LB where 40% would give each of these organisations a score of at least 7 out of 10 on the same measure.



Reputation drivers: Trust



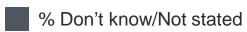
Q To what extent do you feel London Underground....?



















% +60

Net

agree 2012

Base: All MPs (103) who have heard of London Underground, winter 2012

London Buses in focus

Reputation drivers: What LB stands for (summary)



- Valuing customers and their time is a relative area of weakness for LB
 - MPs give an average rating of 60 out of 100 for LB on valuing customers and their time. On this particular measure, just over half (52%) of MPs tend to give a neutral score between 4 and 6 out of 10 which suggests they are yet to be convinced about LB on this measure.
 - Of all of LB's metrics, this is the lowest scoring measure



Reputation drivers: What LB stands for



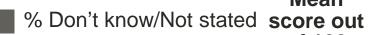
Q To what extent do you feel London Buses....?

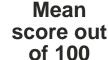












Values customers and their time







60

Base: All MPs (103) who have heard of London Buses, winter 2012

Reputation drivers: Experience (summary)



- Most MPs agree that LB provides a good overall level of service, but only a minority agree that journey time reliability is improving
 - MPs feel LB is delivering a good bus service for customers giving it a mean score of 72 out of 100 on this metric. This measure remains steady compared to 2011 (mean score in 2011 was 70)
 - However, MPs are less convinced that LB is improving bus journey reliability. A
 third agree (give a score of at least 7 out of 10) that LB is improving journey time
 reliability, however the rest either give scores between 4 and 6 or say they 'don't
 know'

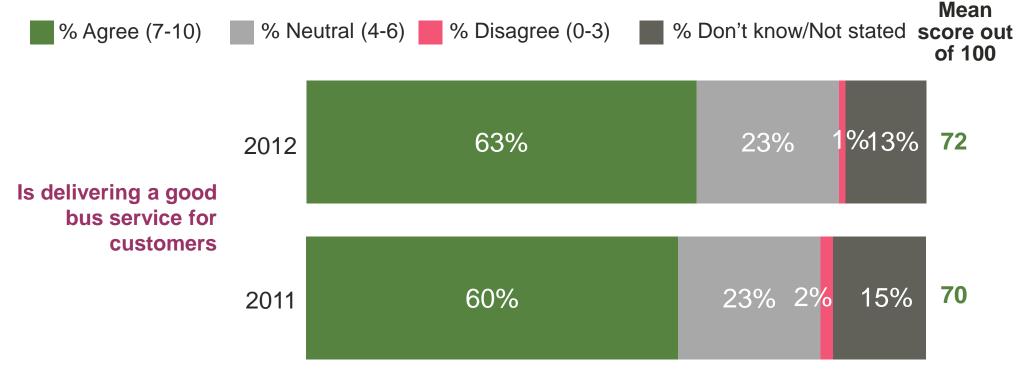


Reputation drivers: Experience



Q To what extent do you feel London Buses....?





Base: All MPs (103) who have heard of London Buses, winter 2012



Reputation drivers: Experience

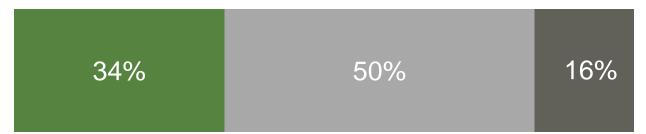


Q To what extent do you feel London Buses....?









Base: All MPs (103) who have heard of London Buses, winter 2012



62

Reputation drivers: Value (summary)



- MPs recognise LB's contribution to London's economy
 - The important role that LB plays in London's economy is widely acknowledged.
 Eight in ten MPs agree (giving a score of at least 7 out of 10) that it is providing a service which helps London's economy. Ratings on this metric have held up since 2011 (the mean score is 76 compared to 74 in 2011)
 - When it comes to value for money though, ratings are slightly lower (71 out of 100) although it is still strong and is seen as a relative area of strength for LB among MPs



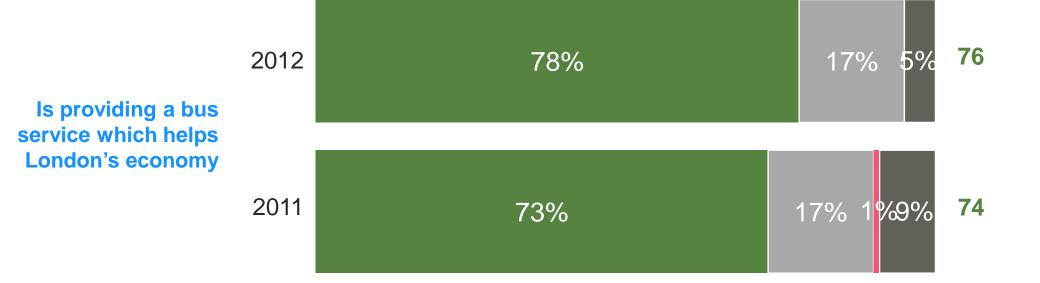
Reputation drivers: Value



Q To what extent do you feel London Buses....?







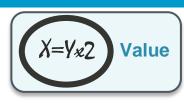
Base: All MPs (103) who have heard of London Buses, winter 2012



Reputation drivers: Value



Q To what extent do you feel London Buses....?



% Agree (7-10) % Neutral (4-6) % Disagree (0-3) % Don't know/Not stated score out

Mean of 100

Provides good value for money



26%

%13%

71

Base: All MPs (103) who have heard of London Buses, winter 2012

LB's reputation drivers: Progress and innovation (summary)



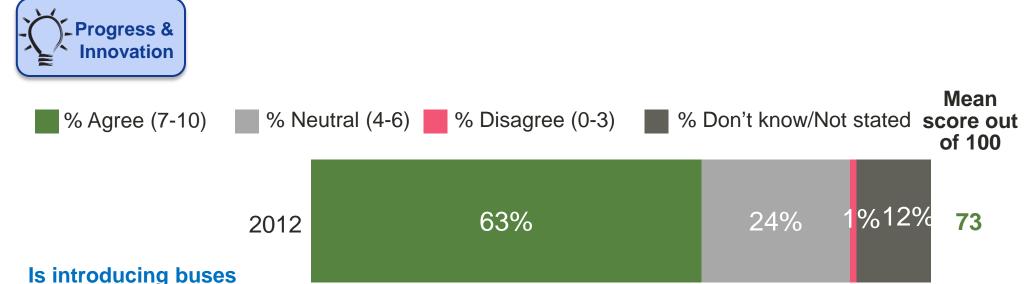
- There is some awareness of specific steps that LB is taking to modernise and improve its services
 - Two thirds (63%) of MPs agree that LB is introducing buses which have a lower impact on the environment
 - Around half agree that LB (54%) is investing in improved bus information for customers
 - Scores on both metrics are very similar to 2011 and there has not been any significant shift in the proportion who were unable to give an answer suggesting LB should continue to build awareness of these activities



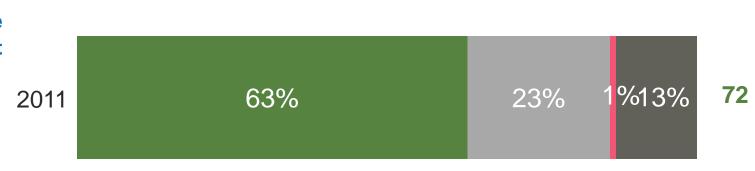
Reputation drivers: Progress and innovation



Q To what extent do you feel London Buses....?







Base: All MPs (103) who have heard of London Buses, winter 2012

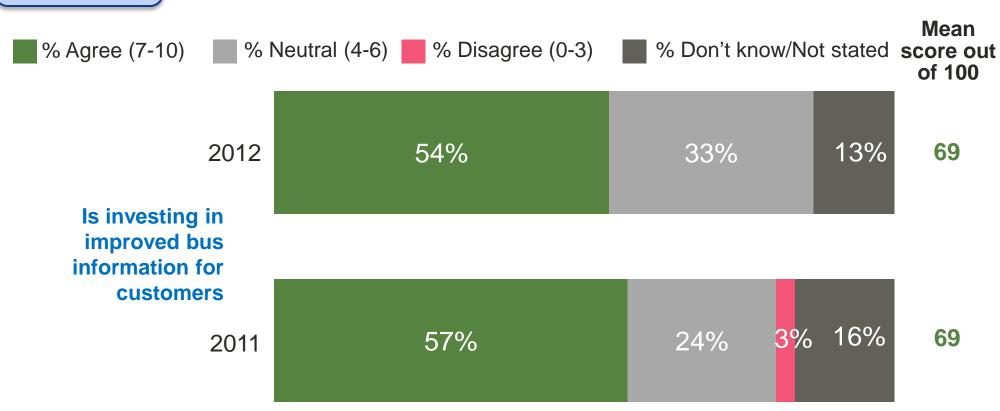


Reputation drivers: Progress and innovation



Q To what extent do you feel London Buses....?





Base: All MPs (103) who have heard of London Buses, winter 2012



LB's reputation drivers: Momentum (summary)



- Most MPs feel that LB is heading in the right direction
 - MPs feel that LB is making positive progress. Over half (55%) describe it as an organisation which is on the way up. Just two percent say that it is on the way down
 - The introduction of modern buses, improved customer communications and the overall level of service provided all contribute to this positive perception of LB.
 Around a fifth of MPs also mention the investment that is being made and the reliability of the service as reasons for their favourable opinion

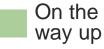
Reputation drivers: Momentum



Q To what extent do you feel London Buses....?

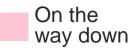


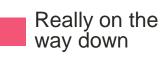
Really on the way up











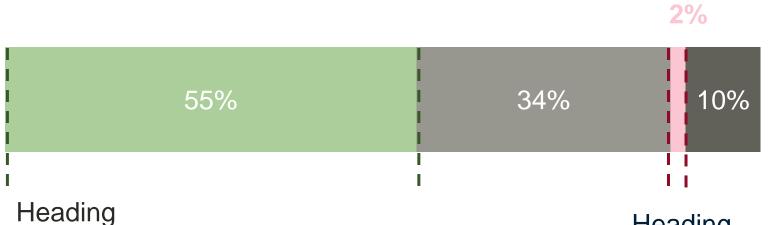


Don't know

Net momentum

2012

+53



Heading

downwards: 2%

Base: All MPs (103) who have heard of London Buses, winter 2012

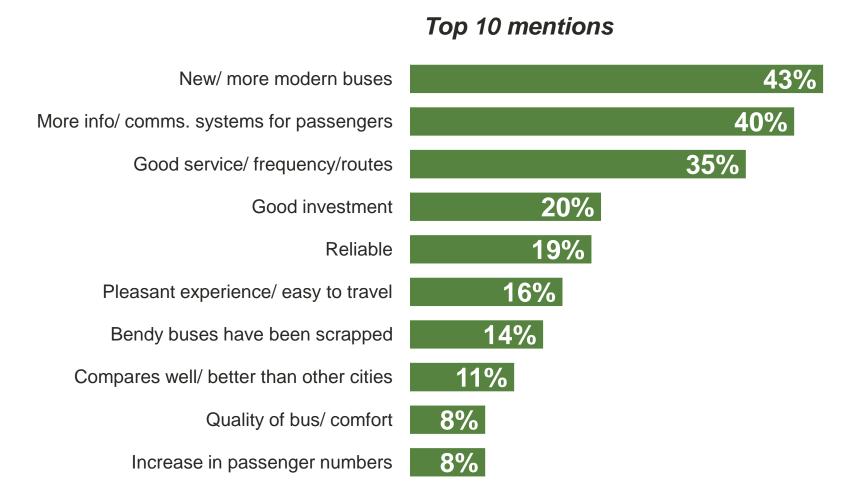


upwards: 55%

Reputation drivers: Sources of momentum



Q Why do you think that London Buses is on the way up?



Base: All MPs (54) who feel that London Buses is on the way up, winter 2012



Momentum: Comments



Q Why do you think that London Buses is on the way up?

"Because of the investment in new buses, the route improvements and generally them being more reliable than they were"

Conservative Minister

"It is a pretty good service and it has definitely improved since I came up to London"

Lib Dem Minister

"They are getting better, they are more reliable, smarter, more modern and one feels that give it another year or two they will be making more progress in the right direction"

Lib Dem Backbencher

"Because they have got rid of the bendy buses, I am not a Tory but I would be tempted to vote for Boris because he got rid of the bendy buses"

Other Backbencher

"It had significant investment in new stock and routes are better planned"

Conservative Backbencher

"I use buses all the time and I get the impression they are improving physically. The seating, the area layout, the convenience factor, they run late with night buses"

Conservative Backbencher

"Their fares are competitive with the Tube, they run all night and because buses suit modern days of working better, in that with digital technology buses are easier to work on and they are a more pleasant environment"

Labour Backbencher

"They are investing in new vehicles, the enunciator equipment at more bus stops means that people can tell when the buses are expected or arriving. So investment in technology and communications as well as the rolling stock is positive"

Labour Shadow Minister



Momentum: Comments



Q Why do you think that London Buses has not moved?

"I don't see any major improvements, I don't think it is particularly going backwards, but I don't see a step change in London Buses at all"

Conservative Backbencher

"I am aware of some improvements to technology, but by and large the level of service is as it was a few years ago. I have not seen any discernible progress"

Conservative Backbencher

"They provide a reasonable service which is good value but I am unaware of significant improvements that have been made in the last six months or are going to be made in the next six months"

Conservative Backbencher

"It seems to me that they are pretty average in terms of how they are developing at the moment. Part of it might be from a position of relative ignorance but I have no strong evidence to suggest they are moving up or down, hence the neutral option"

Conservative Backbencher

"I am not aware of an improvement programme being in existence. They do a very good job and they continue to do a very good job, but I am not aware of it massively improving"

Labour Shadow Minister

"They are good but they haven't done anything that makes me say "wow", they haven't invented different types of buses that give the wow factor, so they just plod along"

Labour Backbencher

"I only have limited experience of the buses, they seem to be fine but I wouldn't say this if fabulous or there is any difference in my experience of the past. I am fairly neutral about them"

Labour Shadow Minister

"The Mayor has taken the decision to invest in trains rather than in buses, so there has been some reduction of the bus lanes etc. He has decided that is his priority and so they are fairly stagnant while the Underground is being developed"

Labour Backbencher



LB's reputation drivers: Trust (summary)



- There is still work to be done to win MPs' trust
 - Four in ten MPs agree that LB is an organisation that they trust. Many others (around half) are neutral, but none disagrees that LB is trustworthy (the remainder "don't know")



Reputation drivers: Trust



64

Q To what extent do you feel London Buses....?









Base: All MPs (103) who have heard of London Buses, winter 2012



London Streets in focus

London Streets: Methodological note



London Streets

NB: Due to the relatively low level of awareness of London Streets, the questions in this section were asked of *all MPs who had heard of TfL* to ensure that as many MPs as possible were included in the overall base.

This section of the questionnaire was preceded with a short introductory note ("As you may know, London Streets is part of Transport for London...") to enable MPs who were unfamiliar with the organisation to answer the questions.

During analysis, the results based only on those MPs who have heard of LS have been reviewed and the pattern is broadly similar to respondents who say they have heard of TfL, although there are more 'don't know' answers among the latter group.

Give the relatively small sample (26 MPs) who have heard of LS, the data based on all who have heard of TfL is shown in this report.



London Streets: Roles and responsibilities

London Streets: Roles and responsibilities



The majority of MPs are unfamiliar with London Streets

- When asked to describe LS' role, around a third of MPs say that they do not know, or have never heard of the organisation
- Of those who do give an answer, most of them tend to guess LS's roles and responsibilities from its name or the introduction given at the start of the interview.
 Thus answers to this question tend to be given with some hesitation.
- The most commonly cited are that it is responsible for London's road network and repairs (17%)
- A similar proportion associate it with promoting walking and improving pedestrian access
- A small number of MPs (around one in ten) do link LS to promoting cycling, street furniture and street cleaning



London Streets: Reputation drivers



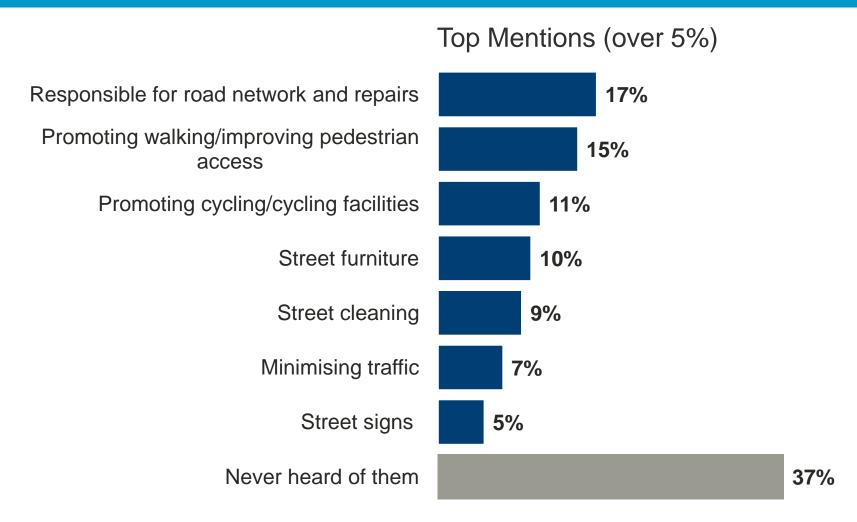
- On the specific metrics under each of LS's reputation drivers, at least one in five MPs rising to around a third are unable to give a rating as they do not feel they know enough about LS
 - Of the five metrics which fall under the Experience reputation driver for LS, LS is best rated for being a trusted source of driver information with 26% agreeing (giving a mean score of 58 out of 100)
 - Almost one in five believe it is successfully managing London's traffic (resulting in a mean score of 53), however the remainder either do not know enough about LS's responsibilities or are yet to be convinced
 - At least 15% of MPs disagree that LS is successfully reducing traffic disruption caused by roadworks by better planning and co-ordination, improving air quality resulting from more traffic and reducing CO2 emissions in London. Again this suggests more communication with MPs is required to inform them of what LS's roles and responsibilities are as well as progress against objectives to date
 - A quarter of MPs agree that LS will successfully introduce new cycle schemes to encourage more people to cycle, but most are neutral/don't know, resulting in a mean score of 60



Roles and responsibilities



Q As you may know, London Streets is part of Transport for London. What do you consider London Streets responsibilities to be?



Base: All MPs (102) who have heard of Transport for London, winter 2012



149

Roles and responsibilities: Comments



Q As you may know, London Streets is part of Transport for London. What do you consider London Streets responsibilities to be?

"They are trying to make us more aware of street life, improving facilities and other things like cycling and other such active movement. So walking and cycling"

Conservative Minister

"Where the bus stops are located, bus shelters and seats"

Lib Dem Minister

"Sounds like it is something to do with streets in London, heaven knows what"

Lib Dem Backbencher

"Maintenance of road and pavement and management of them, which they do moderately well. It needs to be seen as an integral part of TfL. The senior management of TfL doesn't think too much about London Streets, they think an awful lot about buses and trains and overground, which is understandable because that is where the pressure is, but if you think of it as a cascade upwards everybody walks at some point, most people use the bus, some people use the Tube, a smaller number use the overground, but streets are very important to people, the cleanliness and the safety of them"

Labour Backbencher

"To keep the streets clean, lighting, condition of the roads, no potholes"

Conservative Backbencher

"If that is the highways team rebranded then it would be the principal route network in London, and signage on the road network"

Conservative Backbencher

"Keeping the road infrastructure in good condition and adapting it to the demands of traffic flow and pedestrians' needs, and the challenge of more cyclists"

Conservative Backbencher

"The built environment, making it more pleasant to walk in London and possibly cycle lanes"

Labour Backbencher

"The main routes, the main roads that are not the responsibility of London Boroughs, the A roads and the main communication network and the street furniture, the lighting and the footways but not the ones that are controlled by the Boroughs, but the strategic routes"

Labour Backbencher



Reputation drivers: Experience



Q To what extent do you feel that each of the following statements applies to London Streets...



NB: In 2011 this question was asked about TfL ("To what extent do you feel that each of the following statements applies to TfL..."), rather than about London Streets

Base: All MPs (102) who have heard of Transport for London, winter 2012



Reputation drivers: Progress & Innovation



Q To what extent do you feel confident that in the next 3-5 years, London Streets will successfully ...













Don't know



Introduce new cycle schemes to encourage more people to cycle



60

NB: In 2011 these questions were asked about TfL ("To what extent do you feel confident that in the next 3-5 years, TfL will successfully ..."), rather than about London Streets

Base: All MPs (102) who have heard of Transport for London, winter 2012



Reputation drivers: TfL and London Streets



In 2011 these questions were asked about TfL (e.g. "To what extent do you feel confident that in the next 3-5 years, TfL will successfully ..."), rather than about London Streets. Although not strictly comparable, the table below shows the mean scores side by side to indicate the pattern of responses in each year.

To what extent do you feel that each of the following statements applies to [TfL/London Streets]?	Mean score out of 100	
Experience	TfL 2011	LS 2012
Is a trusted source of driver information	54	58
Is successfully managing London's traffic	53	53
Reduce traffic disruption caused by roadworks by better planning and co-ordination	45	48
Improve air quality resulting from road traffic in London	53	47
Reduce CO2 emissions from road traffic in London	53	47
To what extent do you feel confident that in the next 3-5 years [TfL/London Streets] will successfully	Mean score out of 100	
Progress & Innovation	TfL 2011	LS 2012
Introduce new cycle schemes to encourage more people to cycle	68	60



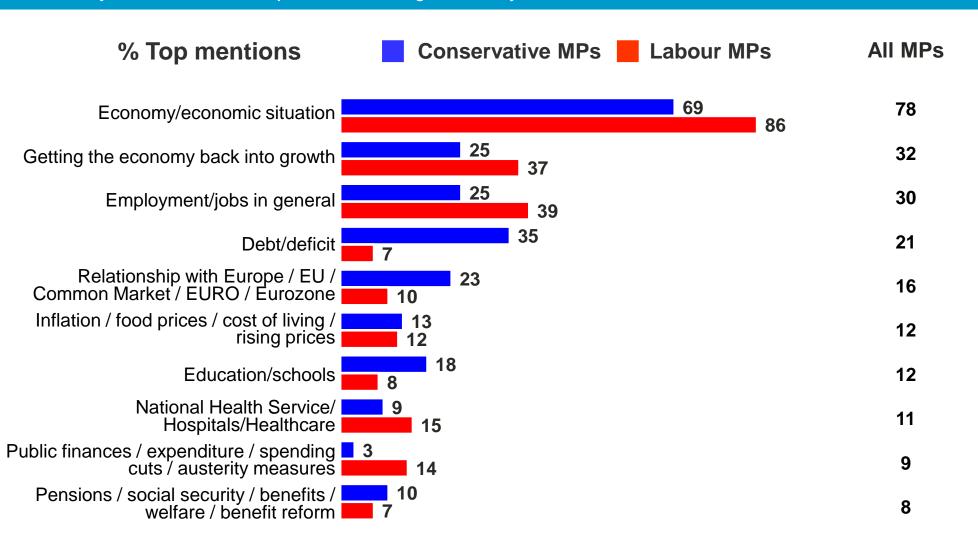
Background findings

Issues facing Britain

Issues facing Britain



Q What do you think are the most important issues facing Britain today?

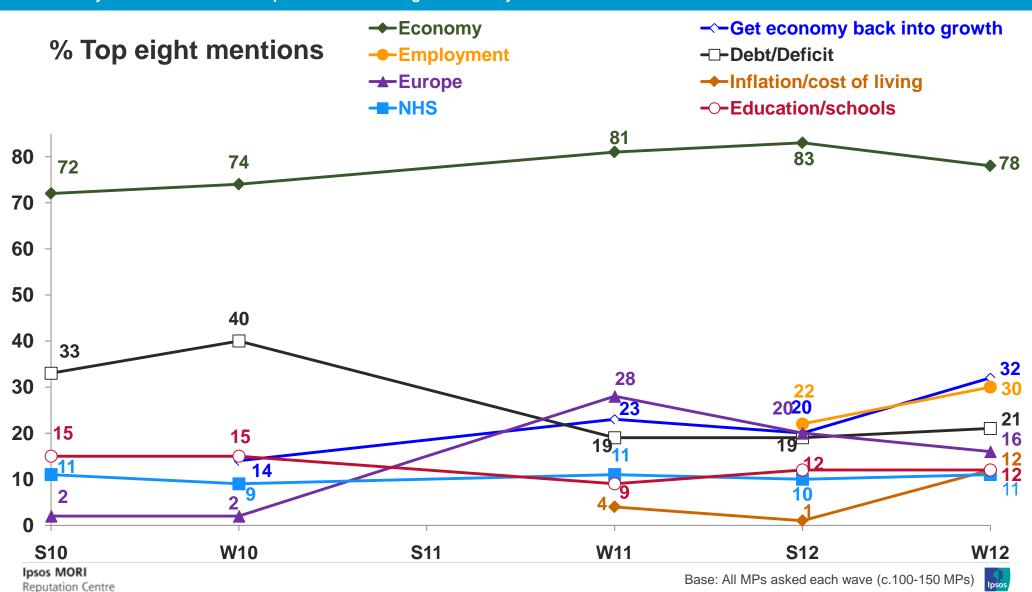




Issues facing Britain - Trends



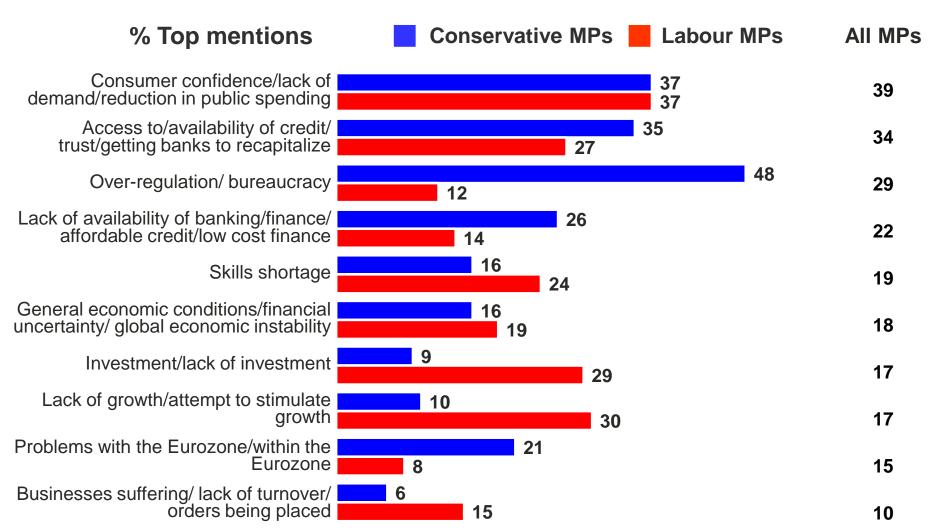
Q What do you think are the most important issues facing Britain today?



Issues facing British businesses



Q What do you think are the most important problems facing British business and industry today?

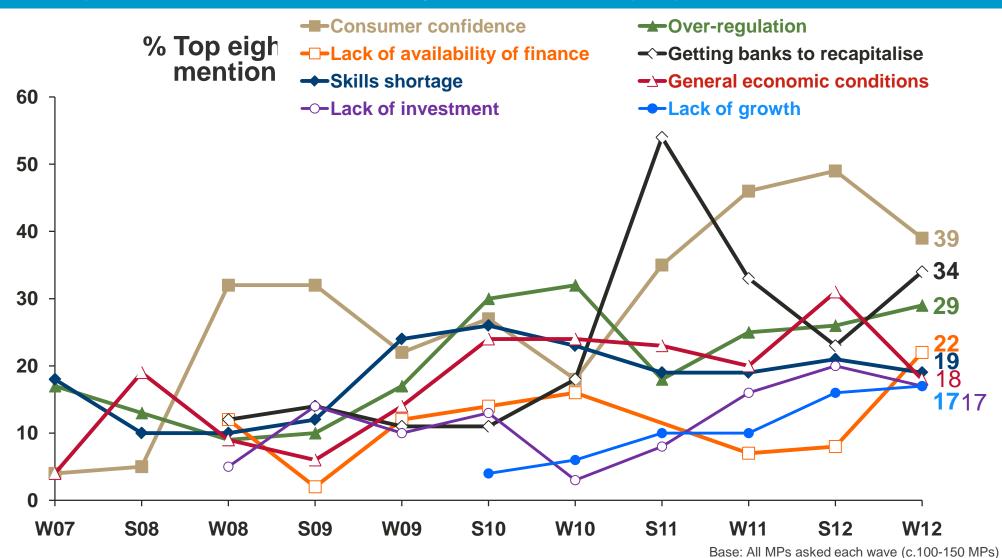




Issues facing British businesses - Trends



Q What do you think are the most important problems facing British business and industry today?



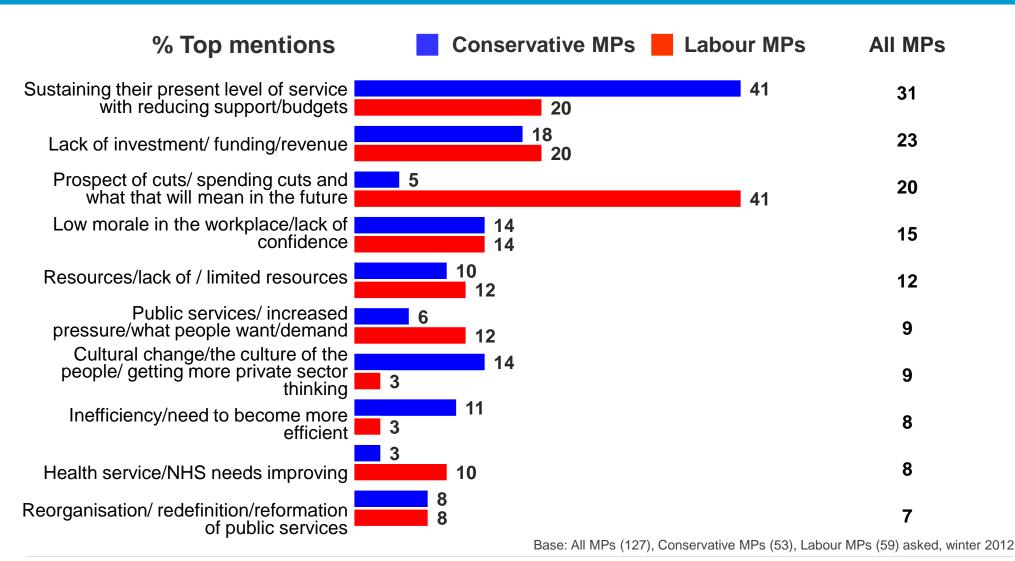


Ipsos

Issues facing public services



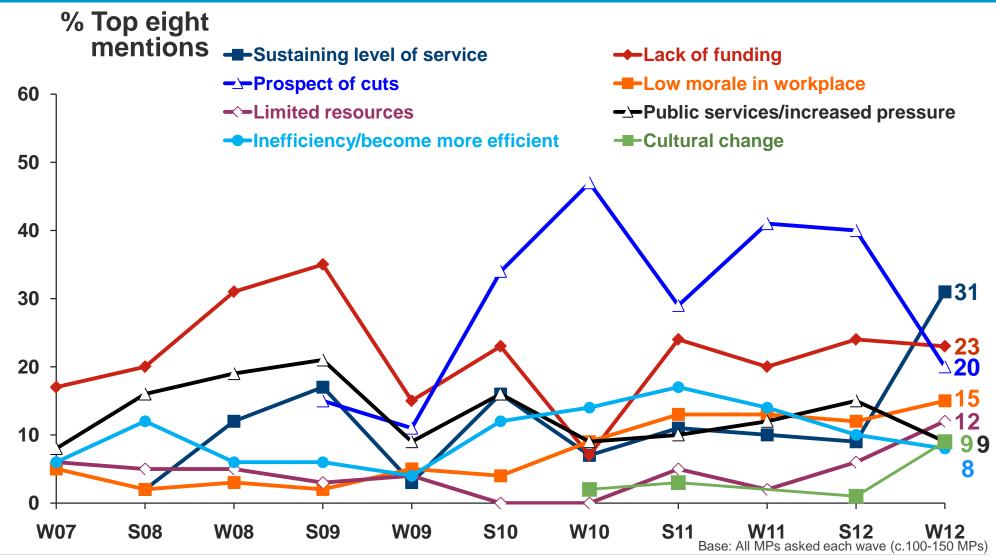
Q What do you think are the most important problems facing our public services today?



Issues facing public services - Trends



Q What do you think are the most important problems facing our public services today?





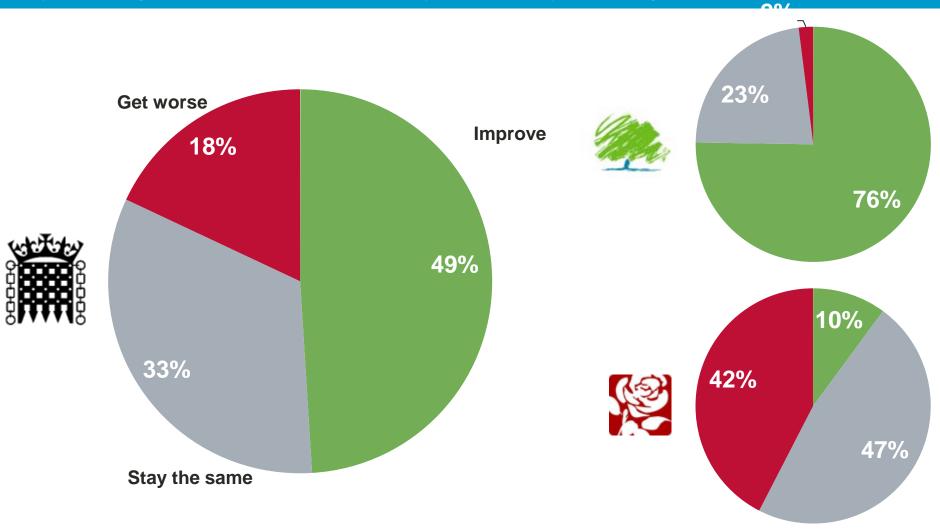
Prospects for the economy



Prospects for the economy



Q Do you think the general economic condition of the country will improve, stay the same or get worse in the next 12 months?

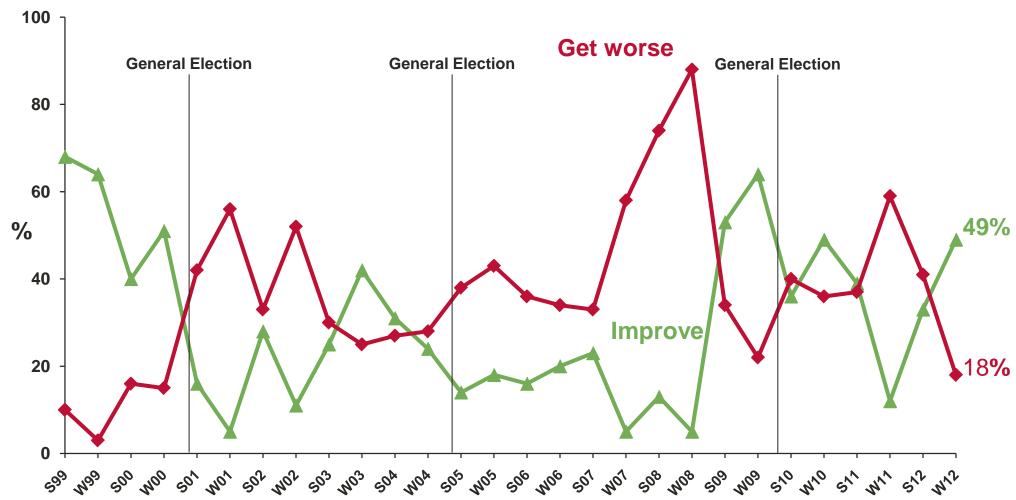




Prospects for the economy – Trends – all MPs (1)



Q Do you think the general economic condition of the country will improve, stay the same or get worse in the next 12 months?

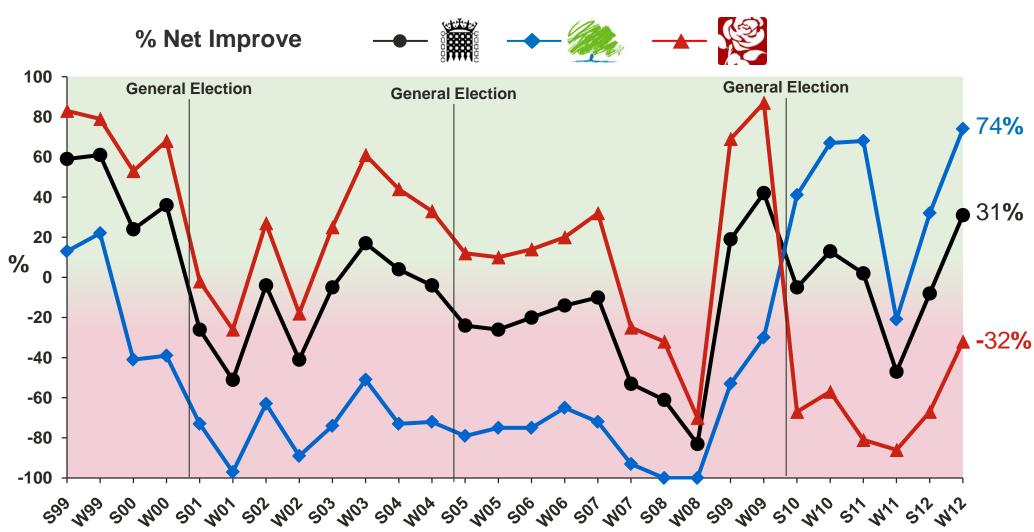


Base: All MPs asked each wave (c.100-150 MPs)

Prospects for the economy – Trends (2)



Q Do you think the general economic condition of the country will improve, stay the same or get worse in the next 12 months?



Base: All MPs asked each wave (c.100-150 MPs)

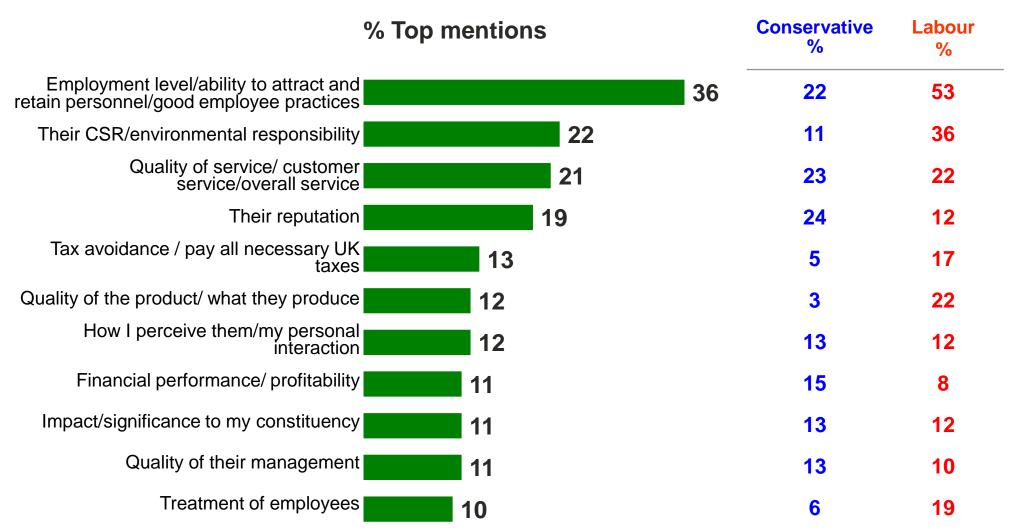


Forming opinions of businesses

Judgement of businesses



Q What are the most important factors you take into account when making your judgement about businesses?

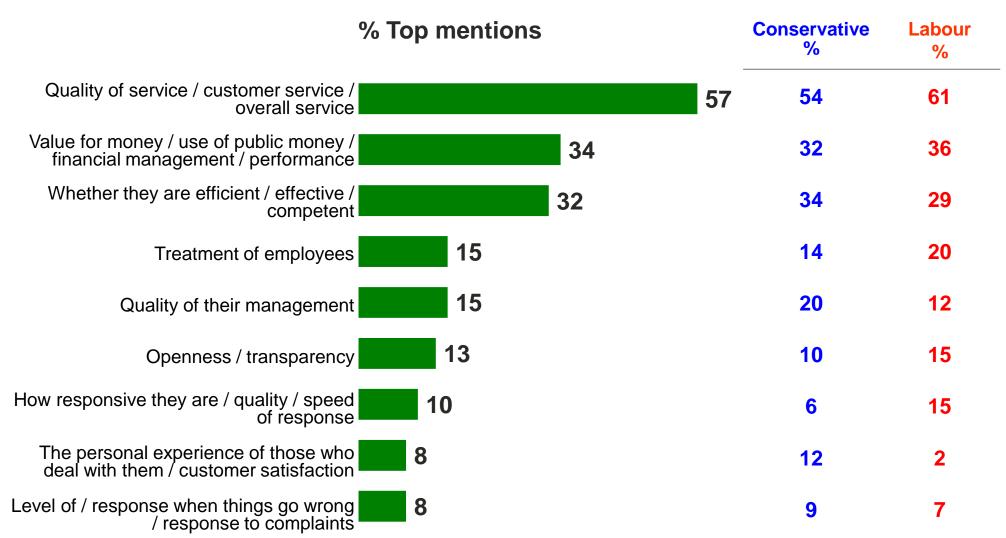




Judgement of public sector organisations



Q What are the most important factors you take into account when making your judgement about public sector organisations or bodies?

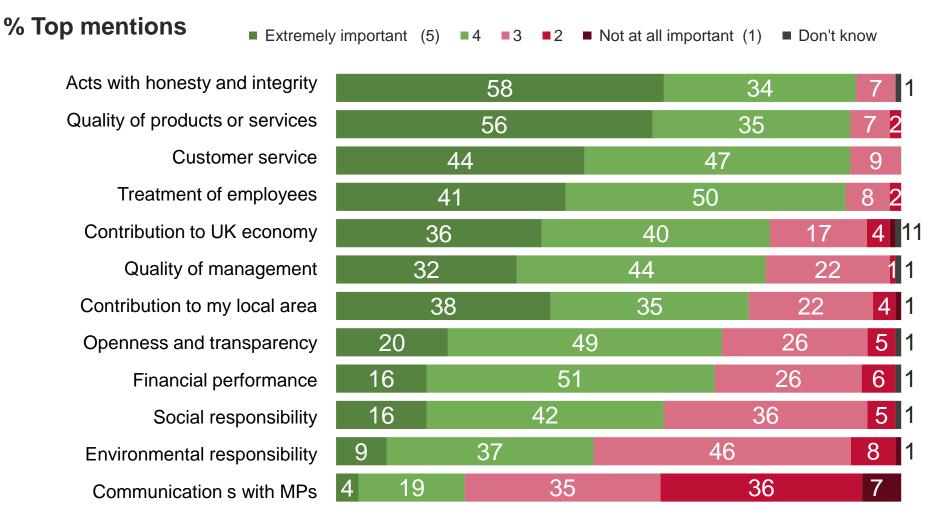




Judgement of companies or organisations



Q How important are each of the following factors when judging a company or organisation?





■ Don't know

Judgement of companies or organisations



Q How important are each of the following factors when judging a company or organisation?

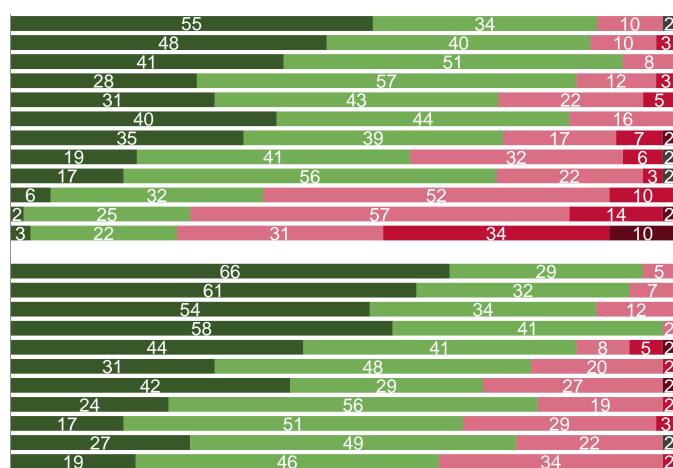
■ Extremely important (5)

20

Conservatives:

Acts with honesty and integrity
Quality of products or services
Customer service
Treatment of employees
Contribution to UK economy
Quality of management
Contribution to my local area
Openness and transparency
Financial performance
Social responsibility
Environmental responsibility
Communications with MPs
Labour:

Acts with honesty and integrity
Quality of products or services
Customer service
Treatment of employees
Contribution to UK economy
Quality of management
Contribution to my local area
Openness and transparency
Financial performance
Social responsibility
Environmental responsibility
Communications with MPs



32

Base: All MPs (127), Conservative MPs (53), Labour MPs (59) asked, winter 2012

39

■ Not at all important (1)



Maintaining relationswith MPs

Maintaining good relations with MPs



Q Turning now to communications, what are the most important things companies, organisations and public service organisations can do to develop and maintain good relations with MPs?

	% Top mentions		Conservative %	Labour %
Communicate on subjects relevant to constituency		30	30	34
Communicate on subjects of interest to MPs		30	38	25
Personal contact	26		22	31
Meetings / seminars	15		11	12
Keep contact in context of item / relevant information	13		15	8
Send round briefs/ short briefs	12		8	20
Write briefly / succinctly	12		12	12
Less e-mail	11		9	10
Don't send glossy brochures / just mail	11		12	12

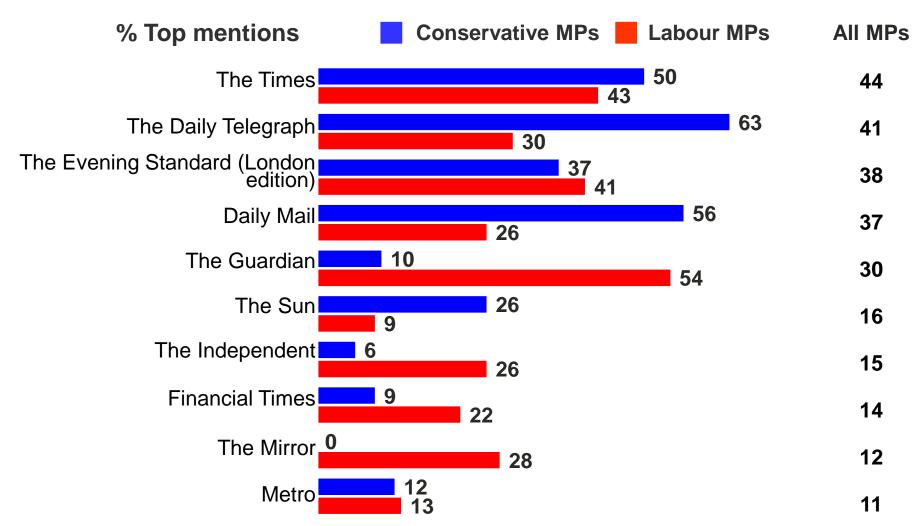


Readership and media use

Readership of daily publications



Q Which of these daily publications, if any, do you read regularly (at least three issues out of four)?

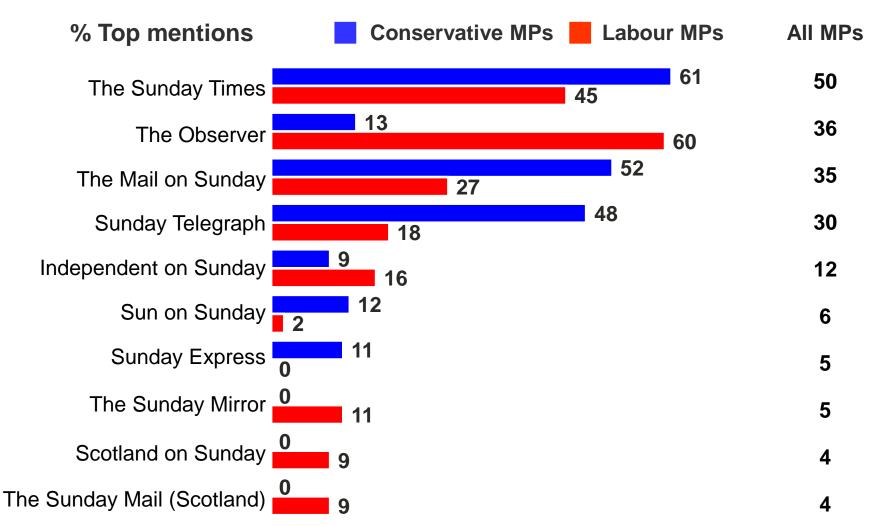




Readership of Sunday publications



Q Which of these Sunday publications, if any, do you read regularly (at least three issues out of four)?

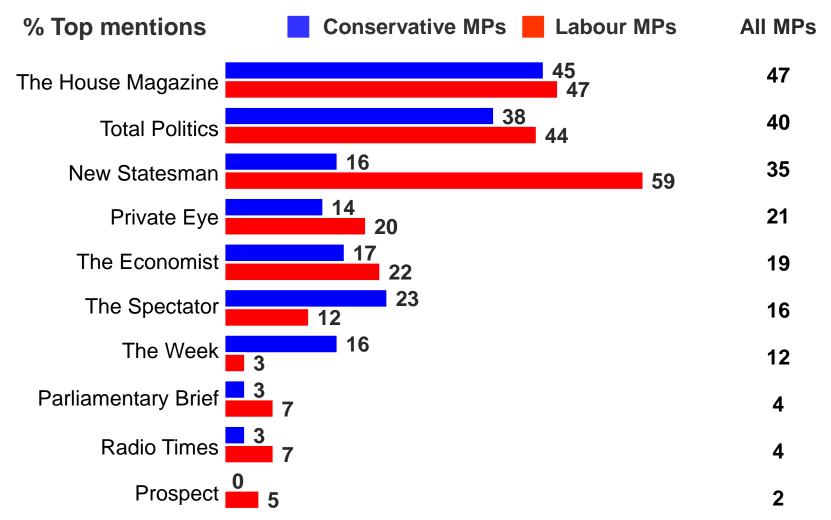




Readership of weekly, fortnightly or monthly publications



Q Which of these weekly, fortnightly, or monthly publications, if any, do you read regularly (at least three issues out of four)?

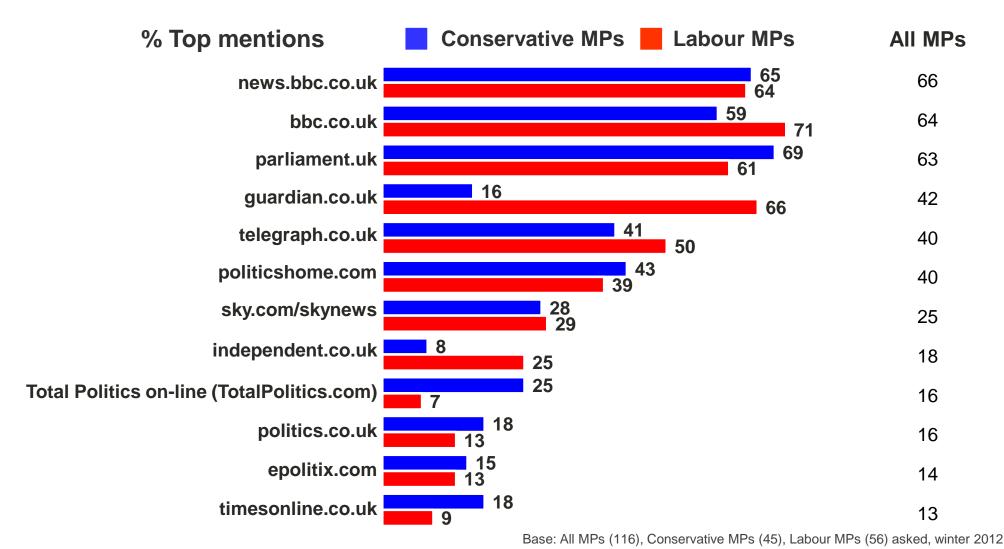




Internet sites regularly accessed



Q And which, if any, of these internet sites do you access regularly?





Frequency of social media use – All MPs (%)



Q How often do you personally access the following social media sites to get information related to your work as an MP?

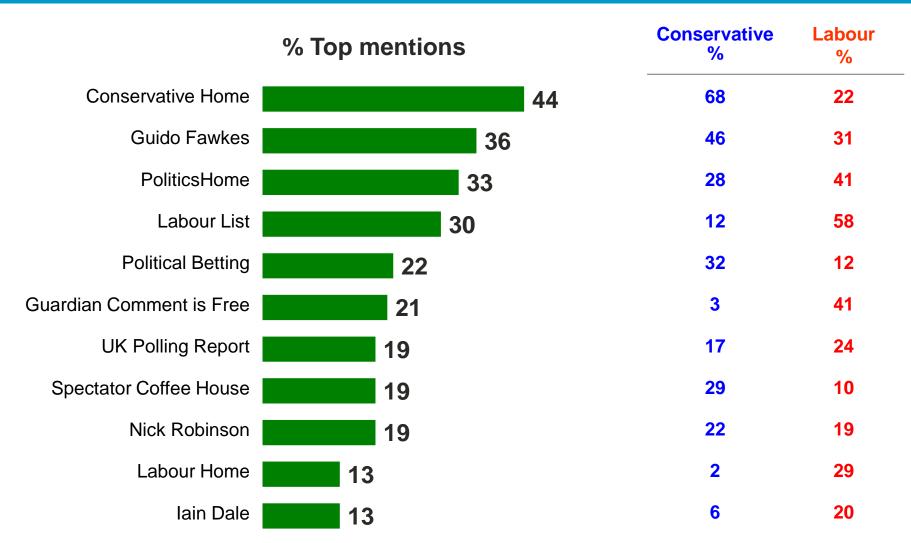




Blogs accessed regularly



Q Which, if any, of these blogs do you access regularly?





Appendix A: Respondents

MPs interviewed:





Conservative Ministers

Mr Robert Goodwill MP

Ms Esther McVey MP

Rt Hon David Mundell MP

Rt Hon Desmond Swayne TD MP

Conservative Backbenchers

Mr David Amess MP	Sir Roger Gale MP	Mr David Nuttall MP
Mr Guto Bebb MP	Rt Hon Cheryl Gillan MP	Mr Andrew Percy MP
Sir Paul Beresford MP	Mr John Glen MP	Mr Christopher Pincher MP
Mr Jake Berry MP	Mr Robert Halfon MP	Mr Alec Shelbrooke MP
Mr Bob Blackman MP	Mrs Rebecca Harris MP	Mr Richard Shepherd MP
Mr Peter Bone MP	Mr Gordon Henderson MP	Mr Henry Smith MP
Mr Julian Brazier TD MP	Mr Adam Holloway MP	Mr Andrew Stephenson MP
Mr Andrew Bridgen MP	Mr Kris Hopkins MP	Mr John Stevenson MP
Mr Steve Brine MP	Mr Gerald Howarth MP	Mr Iain Stewart MP
Mr Robert Buckland MP	Mrs Karen Lumley MP	Mr Gary Streeter MP
Mr David Burrowes MP	Mr Jason McCartney MP	Mr Andrew Turner MP
Mr Philip Davies MP	Mr Nigel Mills MP	Mrs Angela Watkinson MP
Ms Caroline Dinenage MP	Ms Penny Mordaunt MP	Mr Craig Whittaker MP
Mr Mike Freer MP	Mrs Sarah Newton MP	

2 Conservative Ministers wish to remain anonymous

6 Conservative Backbenchers wish to remain anonymous



MPs interviewed:





Labour Shadow Ministers

Mr Willie Bain MP

Dr Roberta Blackman-Woods MP

Sir Tony Cunningham MP

Ms Gloria De Piero MP

Mr Jim Fitzpatrick MP

Ms Lilian Greenwood MP

Mr Andrew Gwynne MP

Rt Hon David Hanson MP

Mr Tom Harris MP

Ms Diana Johnson MP

Mr Kevan Jones MP

Rt Hon Sadiq Khan MP

Rt Hon Anne McGuire MP

Mr Toby Perkins MP

Ms Emma Reynolds MP

Mr Chris Ruane MP

Mr Andy Slaughter MP

Mr Mark Tami MP

Mr Chris Williamson MP

4 Labour Shadow Ministers wish to remain anonymous

Labour Backbenchers

Rt Hon Bob Ainsworth MP	Rt Hon David Lammy MP
Rt Hon Kevin Barron MP	Mr Ian Lavery MP
Mr Paul Blomfield MP	Mr John Mann MP
Rt Hon Ben Bradshaw MP	Mr Steve McCabe MP
Mr Ronnie Campbell MP	Mr Michael McCann MP
Ms Rosie Cooper MP	Ms Siobhain McDonagh MP
Mr Jeremy Corbyn MP	Mr Austin Mitchell MP
Mr Jon Cruddas MP	Mrs Madeleine Moon MP
Mr Brian Donohoe MP	Mr George Mudie MP
Ms Julie Elliott MP	Ms Yasmin Qureshi MP
Mr Christopher Evans MP	Mrs Linda Riordan MP
Mr Paul Farrelly MP	Mr Lindsay Roy CBE MP
Mr Paul Flynn MP	Mr Frank Roy MP
Mr Mike Gapes MP	Mr Dennis Skinner MP
Mr Barry Gardiner MP	Mr Karl Turner MP
Mr Roger Godsiff MP	Mr Derek Twigg MP
Rt Hon Margaret Hodge MBE MP	Mr David Watts MP
Rt Hon George Howarth MP	

¹ Labour Backbencher wished to remain anonymous



MPs interviewed:





Liberal Democrat Ministers

Mr Mark Hunter MP

Miss Jenny Willott MP

Liberal Democrat Backbenchers

Rt Hon Sir Alan Beith MP

Mr Paul Burstow MP

Mr Andrew George MP

Mr Steve Gilbert MP

Mr Nick Harvey MP

Mr Greg Mulholland MP

Dr John Pugh MP

Mr Dan Rogerson MP

Mr Adrian Sanders MP

Mr Andrew Stunell OBE MP

Mr Ian Swales MP

Other MPs

Mr Angus MacNeil MP

10ther MP wished to remain anonymous





For further information contact:

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