Transport for London

Business Leaders Report 2012

MAYOR OF LONDON

Transport for London

Confidentiality

Contents

Methodology

Methodology

- This report presents findings of the 2012 study of Business Leaders, widely acknowledged as the authoritative source of opinion on Britain's business elite
- Respondents are **executive board-level directors only**
- Companies are from:
  - FTSE 350;
  - top 500 industrials by turnover; and
  - top 100 financial companies by capital employed
- A total of 103 respondents took part, details of which are provided below
- Fieldwork: September – December 2012
  - 97 interviews were conducted face-to-face and 6 by telephone
- Where results do not sum to 100%, this may be due to computer rounding, multiple responses or the exclusion of don't know categories
- Half (52%) of the sample is based outside of London, while the remainder (48%) are based in London. This will clearly have an effect on knowledge of transport in London. However, 62% regularly travel on London Underground, which means many have some experience of travel in the capital

Executive summary and implications

Executive summary – key findings

- **Favourability and advocacy towards TfL, LU and LB has improved considerably**
  - Scores have significantly risen for TfL and LU, while LB also makes notable gains
- **Opinion is generally positive on the reputation drivers for TfL, LU and Surface Transport**
  - Scores have generally improved year-on-year and the balance of opinion is positive.
  - The only exceptions are views on improving air quality, reducing CO_2 emissions, and traffic management/reducing disruption due to roadworks, which are relative weaknesses
- **A relatively low level of familiarity with LB means that many are unable to comment on aspects of its reputation**
  - The overall balance is still positive and generally (though not always) those with offices in London have a positive opinion of LB and tend to rate it well. However, those based elsewhere often struggle to form an opinion
- **The overall level of service is seen as a clear strength for LU**
  - Ratings on the overall level of service have significantly improved, with top ratings rising to 75% from 47% in 2011. A reliable/regular service is also LU's top strength, mentioned by 42%, followed by 34% saying the good network/infrastructure is a major strength
- **A majority see both TfL and LU as organisations that are on the way up**
  - Both organisations are well regarded and seen to be making real improvements, as reflected by the general positivity across the reputation drivers

Executive summary – Investment and role in the economy

- Nearly all (93%) say that it is extremely or very important to maintain the planned level of investment in London's transport infrastructure (such as LU), and half (51%) say investment in LU over the past five years has been too little, although this is slightly fewer than in 2011 (62%)
- Most say that continuing to improve LU's services is important to London's on-going economic recovery (85% say extremely or very important and 10% say quite important)
- The ageing infrastructure and problems associated with this are the main weaknesses identified for LU, supporting the perceived need for further investment
- There is also strong support for investment in London's roads, though it is seen to be less important than in LU;
    - 63% say it is extremely or very important and 28% say quite important to London's on-going economic recovery to continue to improve London's network of major roads
- The importance of continuing to invest in LO is rated only a little lower than the road network (though 86% still rate it important), and the importance of investing in the bus network is weaker again (though 78% still rate it important),

Implications

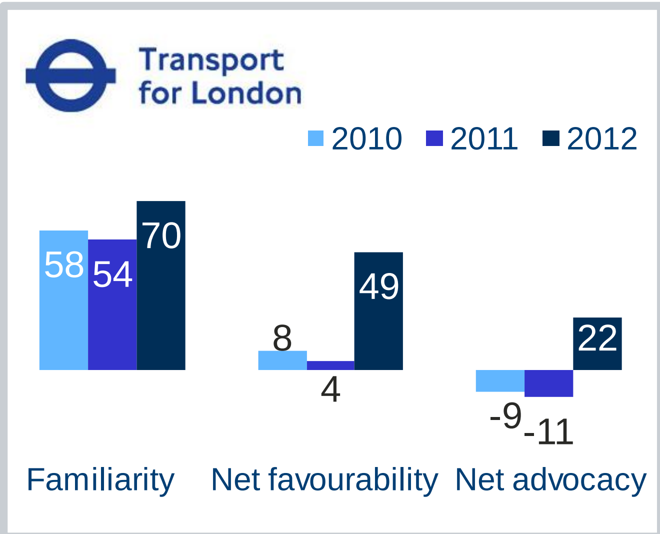
- TfL, LB and LU have made significant ground with Business Leaders and have clearly impressed them over the past year. Overall, ratings of various aspects of corporate reputation and service attributes are positive, and where applicable have improved year-on-year. However, it is unclear whether this upward trend is part of an 'Olympic bounce' or indicates a longer-term move to a consistent, solid base of goodwill and advocacy
- There are still some areas of perceived relative weakness, particularly around areas of Surface Transport's remit, such as traffic management, improving air quality and various aspects of London Buses.
- Mentions of LU's weaknesses are similar to other stakeholder groups, with a focus on the age and state of the infrastructure. Few know enough about LB to have a firm opinion of it in many respects
- To keep up this positive momentum, TfL, LU and Surface Transport need to capitalise on key strengths and increase the level of engagement with Business Leaders (particularly in the case of LB) to highlight improvements and success stories. But, the areas of comparative weakness need to be addressed. Communications on future plans in these areas, especially on aspects of road management, the bus network and investment in LU should go a long way to maintaining a strong reputation among this group

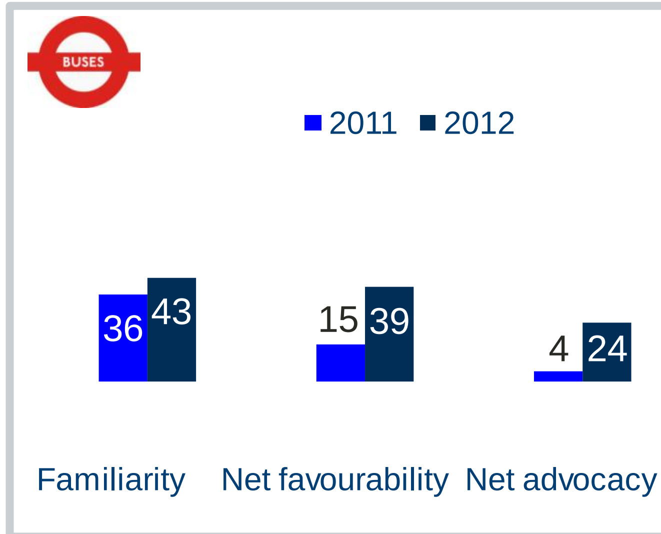
Reputation measures - Scorecard

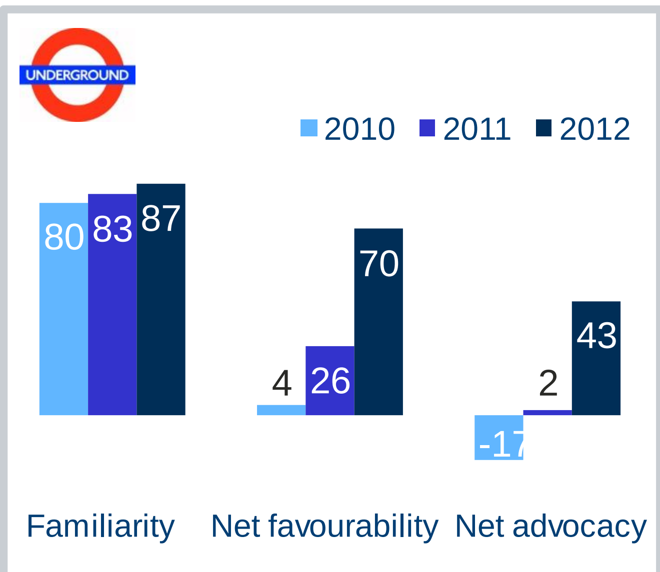
Reputation measures - summary

- **Favourability and advocacy towards TfL has significantly increased, with both achieving an all-time high in 2012**
  - The proportion who are very/mainly favourable has risen by 26 percentage points to 55% and advocacy has risen by 17 percentage points to a strong 30%
- **While muted in comparison to LU and TfL, which have made significant gains, LB sees some positive movements on favourability and advocacy**
  - Favourability has risen by 14 percentage points to 43% and advocacy has risen by 11 percentage points to a solid 28%
- **LU has seen significant improvements on favourability and advocacy**
  - Both scores have jumped significantly; up 29 points to 74% on favourability and up 30 percentage points on advocacy

Reputation Dashboard







Familiarity:
% Know very well/a fair amount

Favourability:
Net (% favourable minus % unfavourable)

Advocacy:
Net (% advocates minus % critics)

Base: All Business Leaders who have heard of each organisation, 2010-2012

Reputation Drivers – TfL summary

Key findings – TfL

- **On balance, TfL is positively rated on each of its reputation drivers**
  - TfL's particular strengths are on its positive contribution to the quality of life in London and its investments to improve the travel experience for the London public
  - Importantly in terms of TfL's overall standing, it is seen by nearly half (45%) as an organisation *on the way up* and only 3% say it is on the way down
- **TfL's relative weaknesses are its reputation for *valuing customers and their time*, and to some extent its communications**
  - Scores for both these metrics are nonetheless positive. However, Business Leaders are more neutral with regards to TfL valuing customers and their time, and communicates honestly and openly than for other measures

TfL's reputation drivers – What TfL stands for – Value

What TfL stands for

Net scores	2011	2012	Chg '11-'12 ±%
Makes a positive contribution to the quality of life in London	n/a	66	n/a
Values customers and their time	n/a	55	n/a
Communicates honestly and openly	n/a	57	n/a

X=Y×2 Value

Net scores	2011	2012	Chg '11-'12 ±%
Provides good value for money	n/a	59	n/a

TfL's reputation drivers – Progress & innovation – Trust

Progress & Innovation

Net scores	2011	2012	Chg '11-'12 ±%
Is investing to improve the experience of the travelling public in London	n/a	65	n/a
TfL Momentum (% 'Really/On the way up')	n/a	45%	n/a
TfL Momentum (% 'Really/On the way down')	n/a	3%	n/a

Trust

Net scores	2011	2012	Chg '11-'12 ±%
Is an organisation I can trust	n/a	58	n/a

Reputation Drivers – Roads summary

Key findings – Roads

- **Business Leaders are highly confident that TfL will introduce schemes to encourage more people to cycle**
  - Scores on this metric are again the strongest of the Roads metrics and have improved since 2011
- **Generally, scores for other Roads metrics have improved; however, the balance of opinion for most measures is negative**
  - Business Leaders are less negative than in 2011 as to whether TfL will improve air quality or reduce CO^2 levels. The majority view is one of neutrality, though opinions are polarised among the remainder
  - On balance, confidence is low that TfL will successfully manage London's traffic and reduce disruption caused by roadworks through better planning and co-ordination.

Roads* reputation drivers – Experience – Progress & innovation

Experience

Net scores	2011	2012	Chg '11-'12 ±%
Improve air quality resulting from road traffic in London	41	**50**	+9
Reduce CO2 emissions from road traffic in London	41	**50**	+9
Is successfully managing London's traffic	34	**46**	+12
Is a trusted source of driver information	37	**52**	+15
By better planning and co-ordination, reduce the traffic disruption caused by roadworks	29	**38**	+9

Progress & Innovation

Net scores	2011	2012	Chg '11-'12 ±%
Introduce new cycle schemes to encourage more people to cycle	62	**68**	+6

*In the questionnaire, responsibility for roads was attributed to TfL

Reputation Drivers – LB summary

Key findings – LB

- **Low level familiarity with LB is driving high levels of neutrality and ‘don’t know’ scores**
  - 43% feel they know LB very or fairly well, which trails other modes considerably. This low-level familiarity means many feel unable to give an opinion of it on further reputation metrics. Nonetheless, the balance of opinion is positive on all LB metrics
- **LB’s introduction of ‘green’ buses has been acknowledged, and as in 2011 this is a relative strength**
  - Additionally, LB is rated well for the quality of its service and importance to the London economy
  - Valuing customers and their time is a relative weaknesses
  - Among those based in London, LB is seen as important to their business. This is not the case for those based outside London, however

LB's reputation drivers – What TfL stands for – Experience

What TfL stands for

Net scores	2011	2012	Chg '11-'12 ±%
Values customers and their time	n/a	53	n/a

Experience

Net scores	2011	2012	Chg '11-'12 ±%
Is improving bus journey time reliability	55	59	+4
Is delivering a good bus service for customers	59	67	+8

LB's reputation drivers – Value – Progress & innovation

Value

Net scores	2011	2012	Chg '11-'12 ±%
Provides good value for money	n/a	**65**	n/a
Is providing a bus service which helps London's economy	60	**67**	+7

Progress & Innovation

Net scores	2011	2012	Chg '11-'12 ±%
Is investing in improved bus information for customers	65	**66**	+1
Is introducing buses which have a lower negative impact on the environment	62	**70**	+8

Reputation Drivers – LU summary

Key findings – LU (1)

- **A key improvement is the ratings of the overall level of service**
  - Ratings of seven or more out of ten are significantly up to 75% from 47% last year, which is promising given around a third regularly use the service
- **LU is highly regarded on all its reputation metrics and there have been clear year-on-year improvements**
  - Business Leaders rate LU highly for each reputation driver, and tellingly it is almost universally seen as on the way up

LU's reputation drivers – What TfL stands for – Experience

What TfL stands for

Net scores	2011	2012	Chg '11-'12 ±%
Communicates honestly and openly about its plans for the future*	n/a	+31%	n/a

Experience

Net scores	2010	2011	2012	Chg '11-'12 ±%
Overall level of service	58	61	73	+12

*This is a net score rather than a mean score, due to the scale used

LU's reputation drivers – Value – Progress and innovation

X=Y×2 Value

Net scores	2010	2011	2012	Chg '11-'12 ±%
Provides good value for money*	n/a	n/a	+46%	n/a
Is a well managed organisation	50	52	64	+8

Progress & Innovation

Net scores	2011	2012	Chg '11-'12 ±%
Is delivering real travel improvements through investment	+43%	+67%	+24
LU Momentum (% 'Really/On the way up')	n/a	72%	n/a
LU Momentum (% 'Really/On the way down')	n/a	n/a	n/a

*This is a net agreement score rather than a mean score, given the scale used

LU's reputation drivers –Trust

Trust

Net scores	2011	2012	Chg '11-'12 ±%
Is an organisation I can trust*	n/a	49%	n/a

*This is a net score rather than a mean score, due to the scale used

Familiarity, favourability & advocacy measures

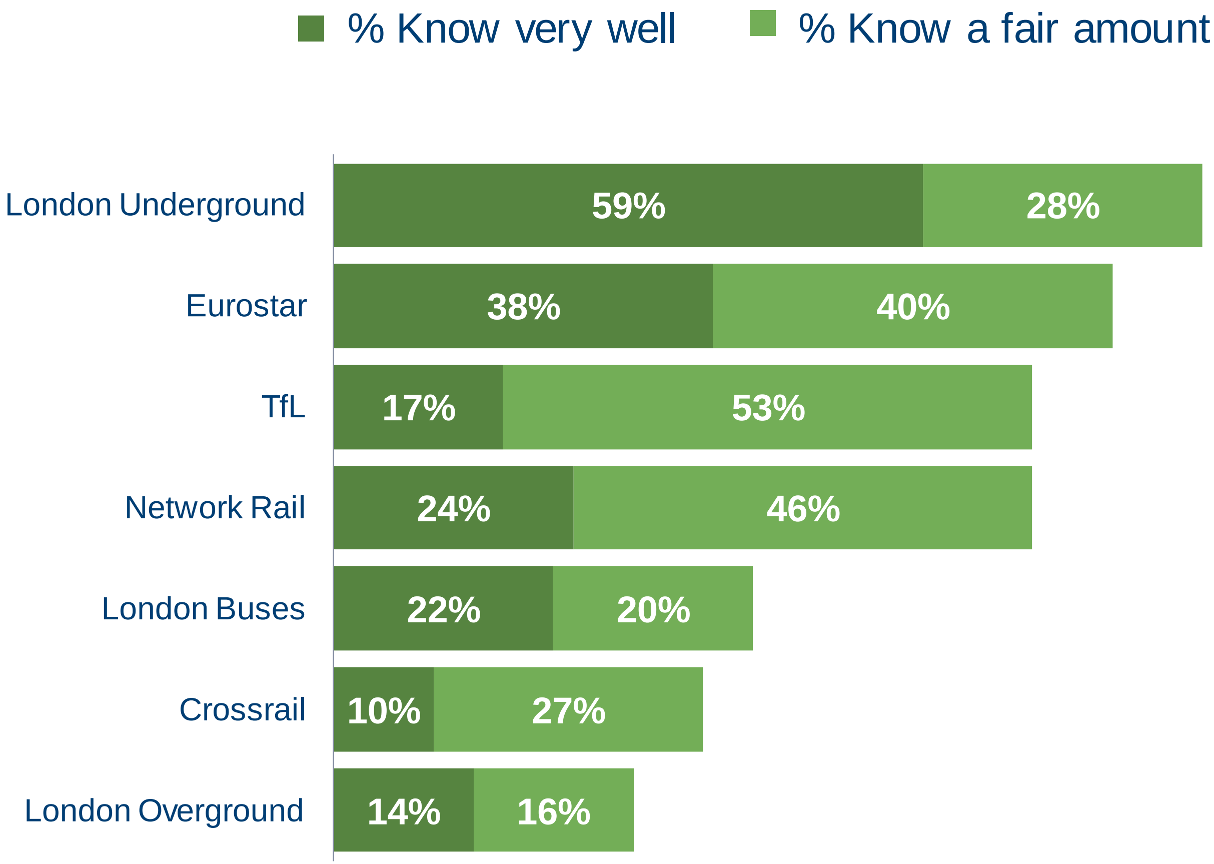
Familiarity summary

- London Underground remains the best known of TfL, LB and LO, with a familiarity (know very well/fair amount) score of 87%. Eurostar is again the next best known, just behind LU

- TfL has seen a 16 percentage point rise in familiarity among Business Leaders over the past year

- Familiarity with LB and LO is lower-level by comparison, though familiarity with LB is on the rise, though not significantly

Familiarity



	Top 2 box Familiarity %	Change 2011-2012
London Underground	87	+4
Eurostar	78	+7
TfL	70	+16
Network Rail	70	+10
London Buses	43	+7
Crossrail	37	n/a
London Overground	29	n/a

Base: Business Leaders, All who are familiar with Eurostar (102), London Underground (102), Transport for London (102), Crossrail (101), London Buses (102), London Overground (93) & Network Rail (102), interviewed Sep-Dec 2012

Trends in familiarity

Know very well/ a fair amount	2007 %	2008 %	2009 %	2010 %	2011 %	2012 %	Change '11- '12
London Underground	83	85	73	80	83	87	+4
Eurostar	71	78	76	65	71	78	+7
Network Rail	70	76	61	72	60	70	+10
TfL	n/a	48	52	58	54	70	+16
London Buses	n/a	n/a	n/a	n/a	36	43	+7
London Overground	n/a	n/a	n/a	n/a	n/a	29	n/a
Crossrail	n/a	n/a	n/a	n/a	n/a	37	n/a

Base: Business Leaders (Circa 100), interviewed 2007-2012

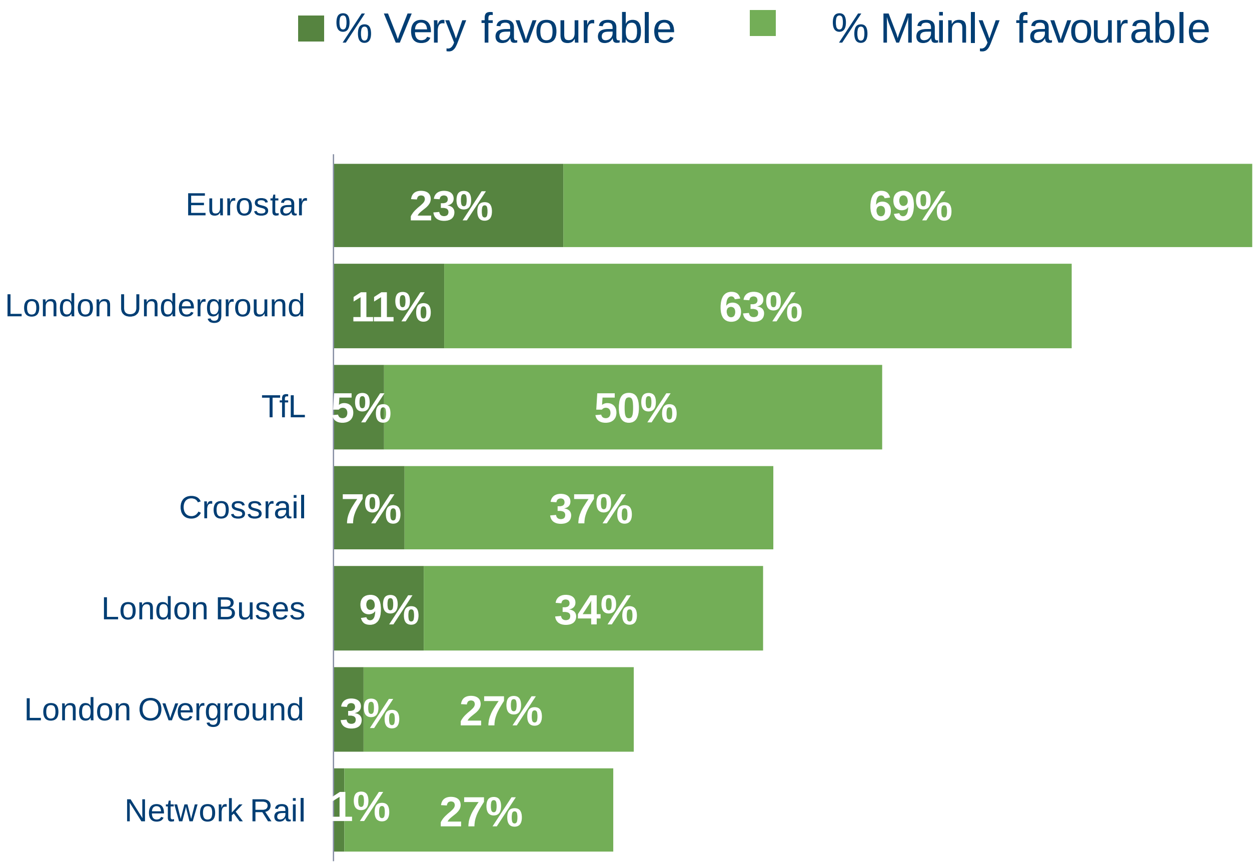
Favourability Summary

- TfL, LU and LB have each seen notable improvements in favourability over the past 12 months. Favourability (very/mainly favourable) towards LU has risen by 29 percentage points to 74%; scores for TfL have jumped by 26 percentage points to 55; the jump for LB is muted by comparison (up by 14 percentage points), but is an improvement nonetheless

- This increase in favourable opinion has been matched, in part, by a decline in the proportion of unfavourable business leaders for TfL, LU and LB

- Despite these improvements, Eurostar is still the most highly regarded by Business Leaders – nine in ten are very or mainly favourable towards it. However, LU has made considerable gains and is closing the gap between the two organisations

Favourability



	Total favourable %	Change 2011-2012
Eurostar	91	+13
London Underground	74	+29
TfL	55	+26
Crossrail	44	n/a
London Buses	43	+14
London Overground	30	n/a
Network Rail	28	+6

Base: Business Leaders, All who are familiar with Eurostar (102), London Underground (102), Transport for London (102), Crossrail (101), London Buses (102), London Overground (93) & Network Rail (102), interviewed Sep-Dec 2012

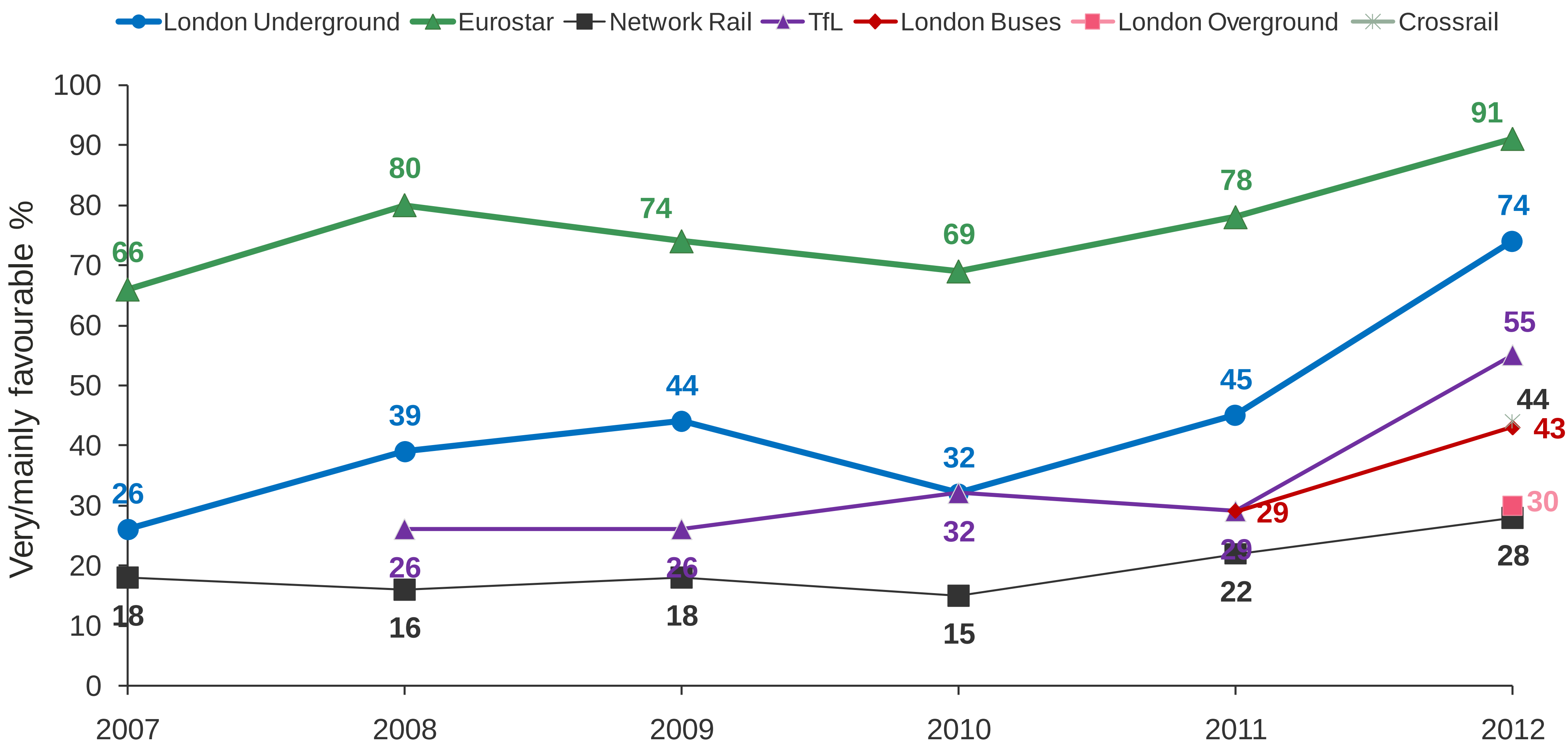
Favourability

Favourable	2007	2008	2009	2010	2011	2012	Change '11- '12
Eurostar	66	80	74	69	78	91	+13
London Underground	26	39	44	32	45	74	+29
TfL	n/a	26	26	32	29	55	+26
London Buses	n/a	n/a	n/a	n/a	29	43	+14
Network Rail	18	16	18	15	22	28	+6
London Overground	n/a	n/a	n/a	n/a	n/a	30	n/a
Crossrail	n/a	n/a	n/a	n/a	n/a	44	n/a

Unfavourable	2007	2008	2009	2010	2011	2012	Change '11- '12
Network Rail	46	50	42	40	38	16	-22
TfL	n/a	29	20	24	24	6	-18
London Underground	45	33	29	28	19	4	-15
London Buses	n/a	n/a	n/a	n/a	14	4	-10
Eurostar	6	9	5	3	1	0	-1
London Overground	n/a	n/a	n/a	n/a	n/a	0	n/a
Crossrail	n/a	n/a	n/a	n/a	n/a	2	n/a

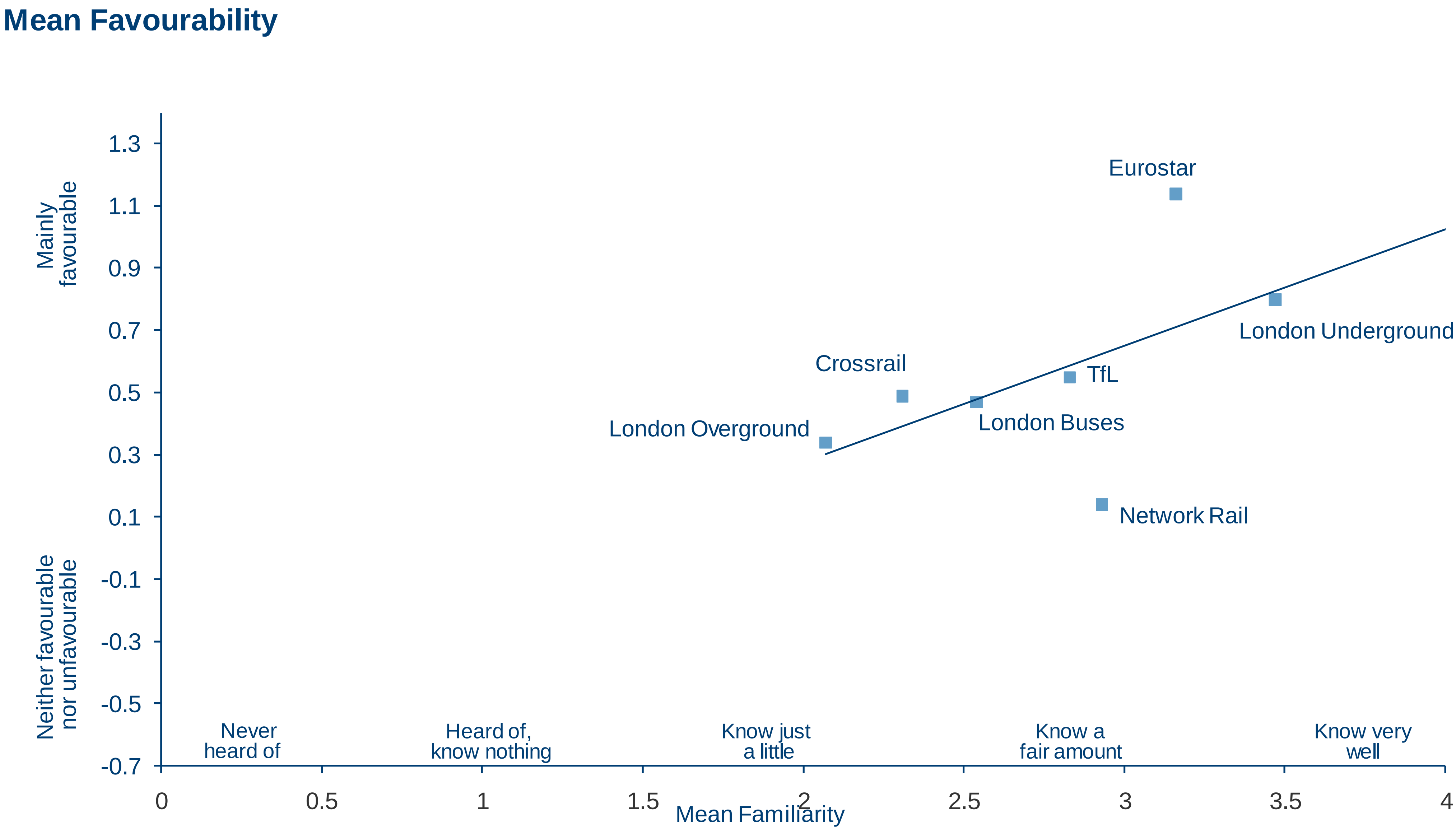
Base: Business Leaders (Circa 100), interviewed 2007-2012

Favourability



Base: Business Leaders (Circa 100), interviewed 2007-2012

Transport for London familiarity and favourability

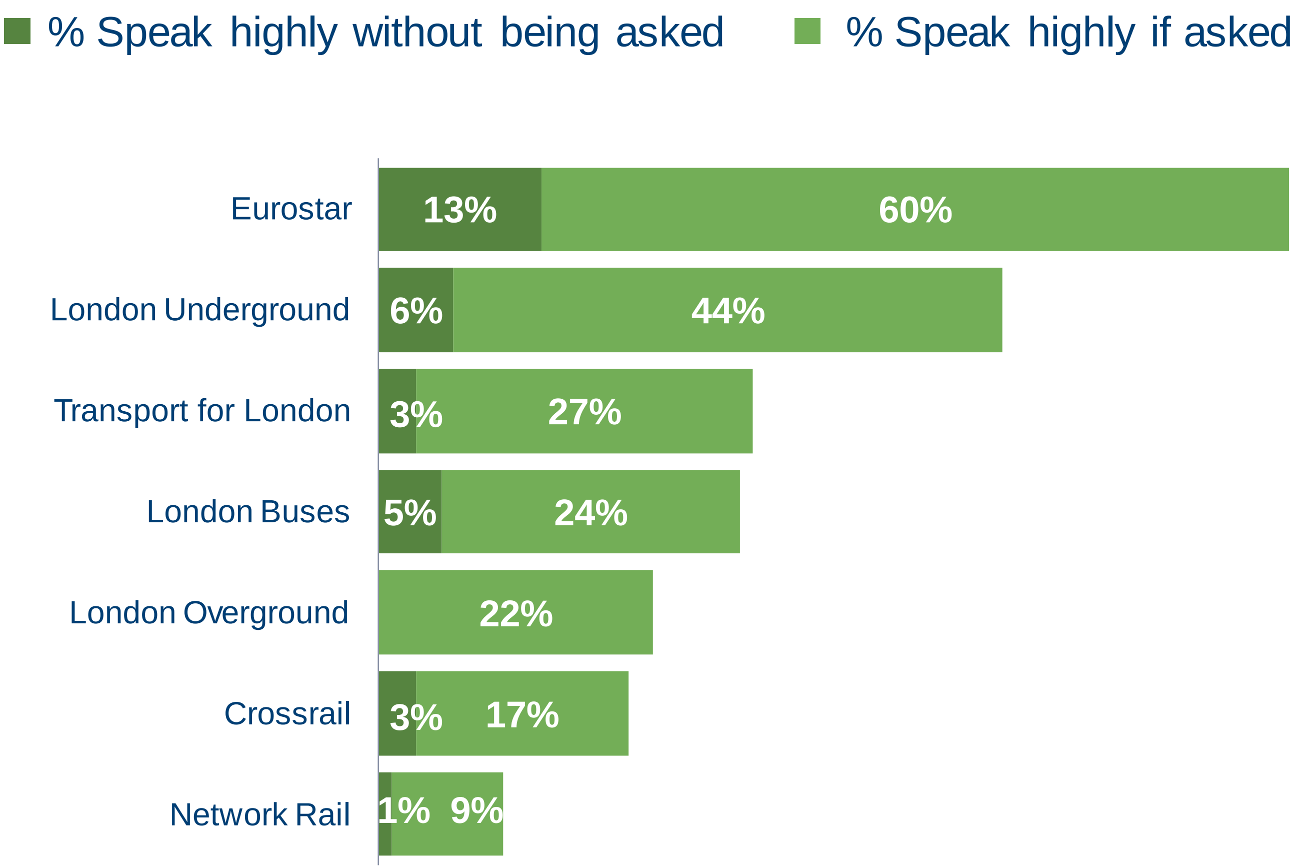


Base: Business Leaders, All who are familiar with Eurostar (102), London Underground (102), Transport for London (102), Crossrail (101), London Buses (102), London Overground (93) & Network Rail (102), interviewed Sep-Dec 2012

Advocacy Summary

- In line with improvements on favourability, TfL, LU and LB have each made considerable gains in advocacy
- LU has seen a 30 percentage point increase in the proportion of advocates and a notable drop of 11 percentage points in criticism, meaning it currently enjoys a strong reputation among business leaders
- The improvement for TfL is less dramatic, but nonetheless still positive; advocacy towards the organisation is the highest on record. Advocacy is up 17 percentage points to 30% and criticism is down by 15 percentage points
- As with favourability, the improvements for LB are muted by comparison. Nonetheless the movement is positive given the relatively low level of familiarity with the service. Just over one in four (28%) would now speak highly of LB, compared to 17% last year

Advocacy



	Speak highly%	Change 2011-2012
Eurostar	73	+17
London Underground	50	+30
Transport for London	30	+17
London Buses	28	+11
London Overground	22	n/a
Crossrail	20	n/a
Network Rail	10	0

Base: Business Leaders , All who are familiar with Eurostar (102), London Underground (102), Transport for London (102), Crossrail (101), London Buses (102), London Overground (93) & Network Rail (102), interviewed Sep-Dec 2012

Advocacy trends

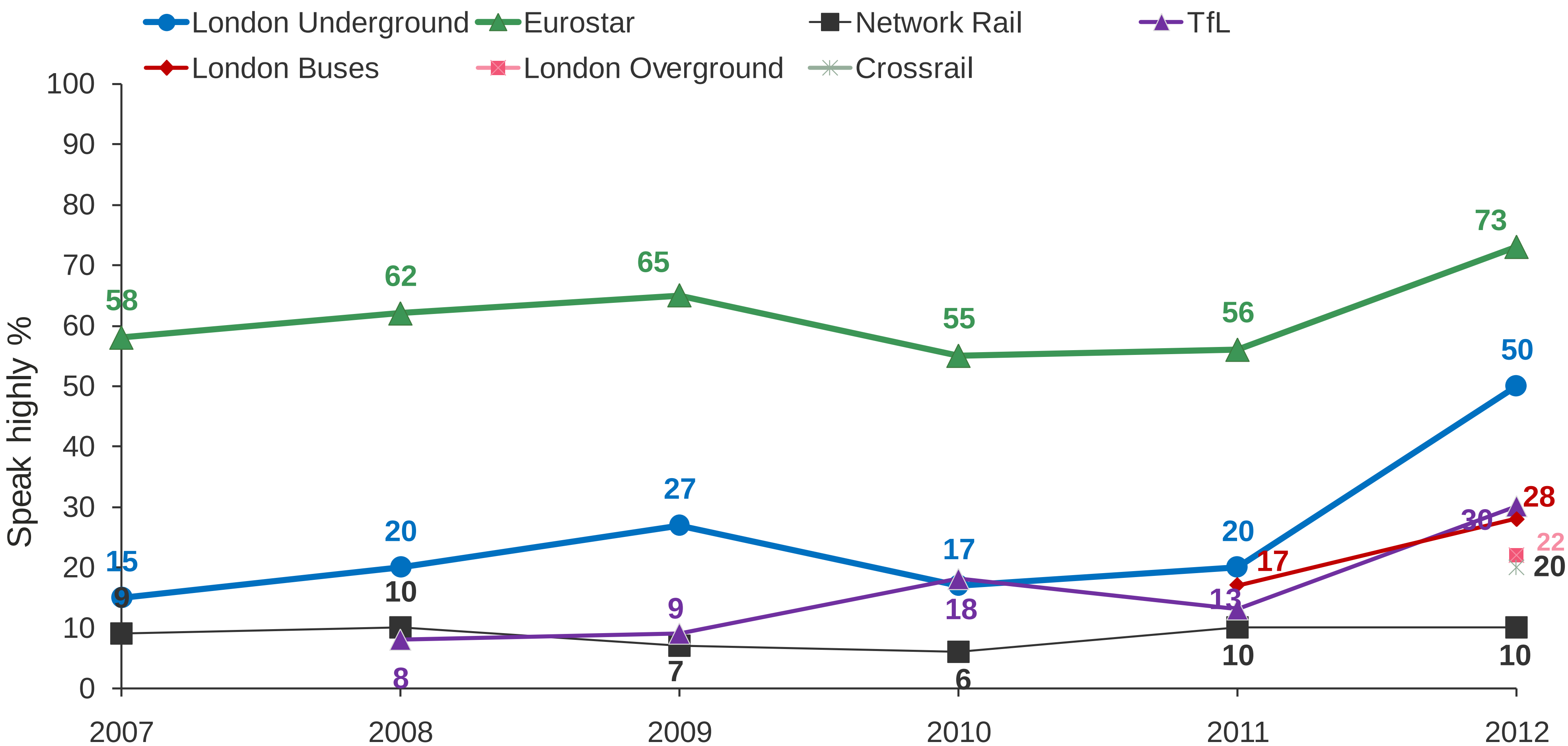
Speak highly	2007 %	2008 %	2009 %	2010 %	2011 %	2012 %	Change '11 - '12
Eurostar	58	62	65	55	56	73	+17
London Underground	15	20	27	17	20	50	+30
London Buses	n/a	n/a	n/a	n/a	17	28	+11
TfL	n/a	8	9	18	13	30	+17
Network Rail	9	10	7	6	10	10	0
London Overground	n/a	n/a	n/a	n/a	n/a	22	n/a
Crossrail	n/a	n/a	n/a	n/a	n/a	20	n/a

Be critical	2007 %	2008 %	2009 %	2010 %	2011 %	2012 %	Change '11 - '12
Network Rail	43	45	34	38	30	13	-17
TfL	n/a	29	23	27	24	9	-15
London Underground	42	34	28	34	18	7	-11
London Buses	n/a	n/a	n/a	n/a	13	5	-8
Eurostar	6	10	3	3	1	1	0
London Overground	n/a	n/a	n/a	n/a	n/a	1	n/a
Crossrail	n/a	n/a	n/a	n/a	n/a	2	n/a

Base: Business Leaders (Circa 100), interviewed 2007-2012

Advocacy

Transport for London



Base: Business Leaders, All who are familiar with Eurostar (102), London Underground (102), Transport for London (102), Crossrail (101), London Buses (102), London Overground (93) & Network Rail (102), interviewed Sep-Dec 2012

TfL Section:
TfL's reputation drivers

TfL Reputation Drivers – What TfL stands for (summary)

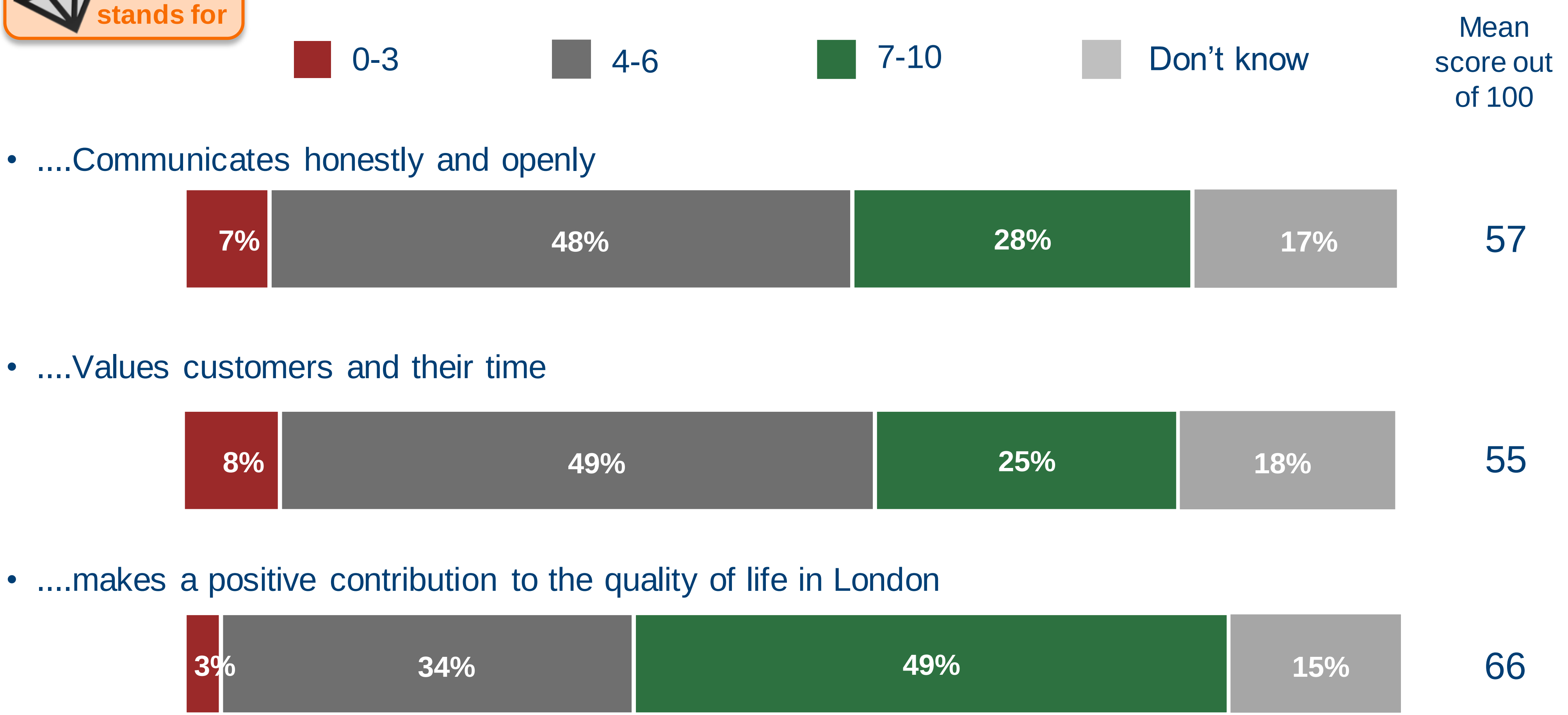
- TfL is highly rated on '*making a positive contribution to the quality of life in London'.* Just under half (49%) agree this is the case (seven or more out of ten), whereas just three percent disagree. The remainder are either neutral or do not know enough to give an opinion

- Ratings for '*communicating honestly and openly*' and '*valuing customers and their time*' are less positive, though this is due to around half (48% and 49% respectively) giving neutral ratings of four to six out of ten

- Nonetheless, the balance of opinion for these two metrics is positive. For both, around a quarter give agree that is has honest and open communications and values its customers and their time

TfL Reputation Drivers – What TfL stands for

What TfL stands for



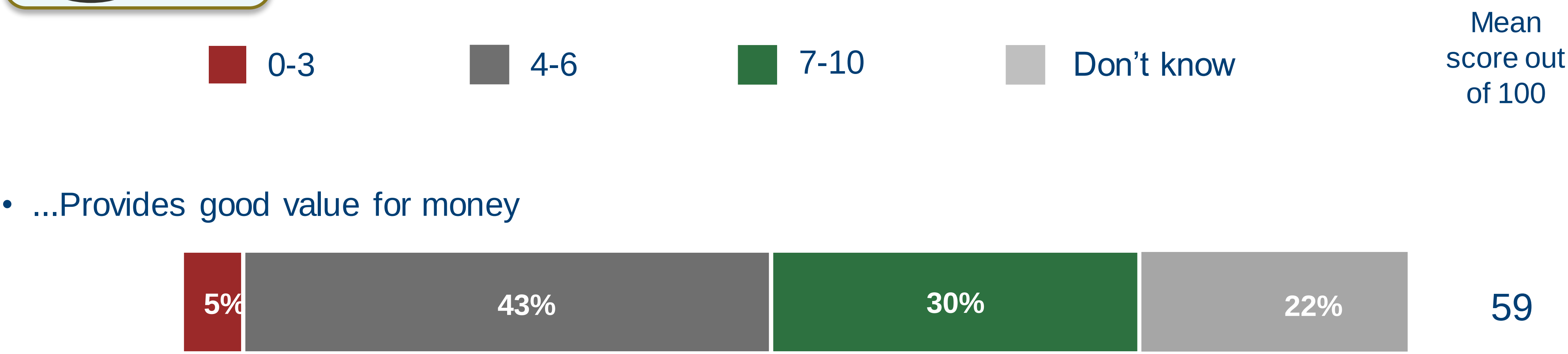
To what extent do you feel that each of the following statements applies to Transport for London, using a scale of 0 to 10 where 0 means that you strongly disagree and 10 means that you strongly agree

TfL Reputation Drivers – Value (summary)

- Business Leaders tend to be neutral on whether TfL *provides good value for money*. 43% give scores of four to six out of ten and 22% don't know enough to comment. However, the overall balance of opinion is positive. Just five percent disagree this is the case while 30% agree

TfL Reputation Drivers – Value

Value



To what extent do you feel that each of the following statements applies to Transport for London, using a scale of 0 to 10 where 0 means that you strongly disagree and 10 means that you strongly agree

TfL Reputation Drivers – Progress & innovation (summary)

- In line with the upward trend in the overall reputation metrics (familiarity, favourability and advocacy), TfL is seen as an organisation *on the way up*. 45% believe that it is moving in this direction

- Among the remainder, opinion is neutral; 33% believe it is not moving and a further 19% don't know

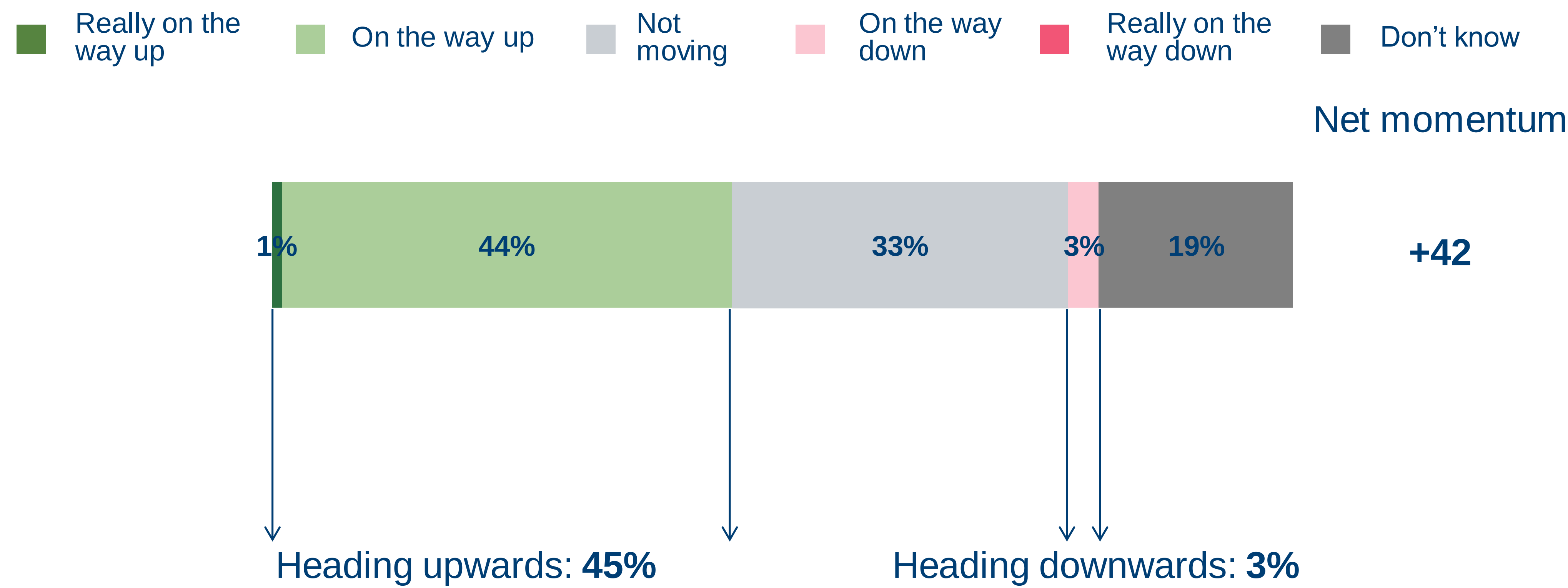
- Almost half (49%) of Business Leaders agree that TfL i*s investing to improve the experience of the travelling public in London*. This positive rating puts this measure of value on a par with scores for *making a positive contribution to the quality of life in London* (the highest scoring measure for TfL). However, just under half are either neutral or 'don't know'. Those who are neutral are tend to be based outside London

Momentum

Transport for London

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

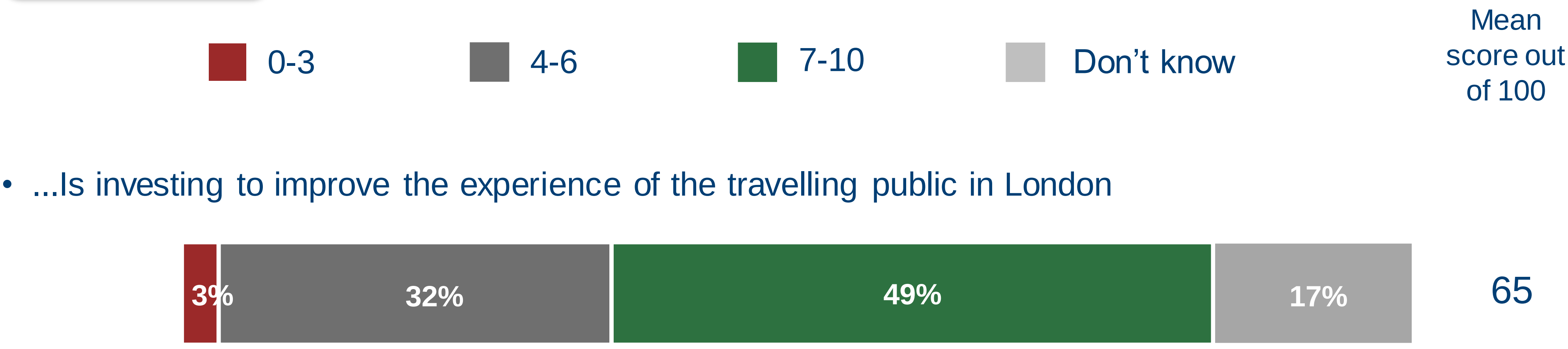
Progress & Innovation



Base: Business Leaders (103), interviewed Sep-Dec 2012

TfL Reputation Drivers – Experience

Progress & Innovation



To what extent do you feel that each of the following statements applies to Transport for London, using a scale of 0 to 10 where 0 means that you strongly disagree and 10 means that you strongly agree

Base: Business Leaders (103), interviewed Sep-Dec 2012

TfL Reputation Drivers – Trust (summary)

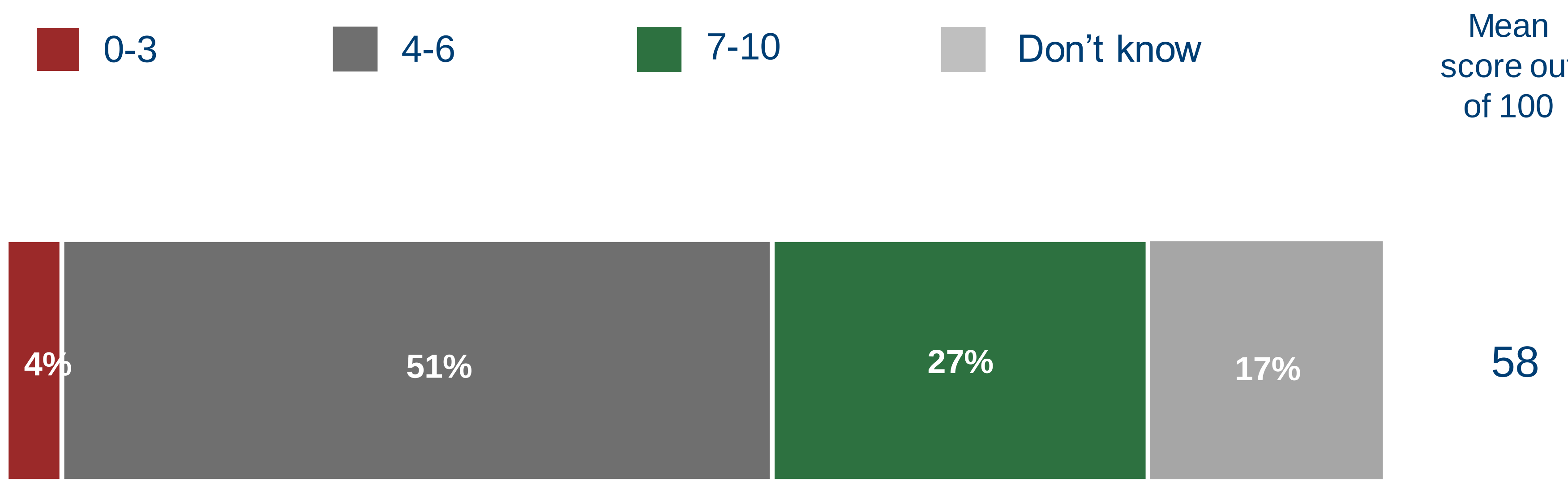
- On *trust*, many are neutral and just under one in five (17%) do not feel they know enough to give an opinion of TfL. Half (51%) give scores of four to six and a further 17% don't know

- As with other TfL attributes, the balance is positive. In this instance, 27% agree that TfL *is an organisation they can trust*

TfL Reputation Drivers - Trust

- ...Is an organisation I can trust

Trust



To what extent do you feel that each of the following statements applies to Transport for London, using a scale of 0 to 10 where 0 means that you strongly disagree and 10 means that you strongly agree

Base: Business Leaders (103), interviewed Sep-Dec 2012

Surface Transport Section:

Roads – Reputation drivers

Roads Reputation Drivers – Experience (summary - 1)

- Confidence that TfL will *successfully reduce CO_2 emissions* and *improve air quality* has strengthened since 2011. Opinion is now evenly balanced that they will achieve these goals, thanks to a significant drop in the proportion who lack confidence that TfL will reduce emissions and improve air quality. The proportion giving zero to three scores on *reducing CO2 emissions* is down 16 percentage points and down 21 percentage points on improving air quality

- Levels of confidence in TfL's traffic management have on balanced improved since 2011, but confidence overall is still low; few agree that it is *successfully managing traffic* and few have confidence that it will *reduce traffic disruption caused by roadworks*

- 40% lack confidence that TfL *will reduce traffic disruption caused by roadworks by better planning and co-ordination*. This is significantly lower than in 2011, but given few (just seven percent) are confident it can achieve this, there is still much to do to boost confidence among this group

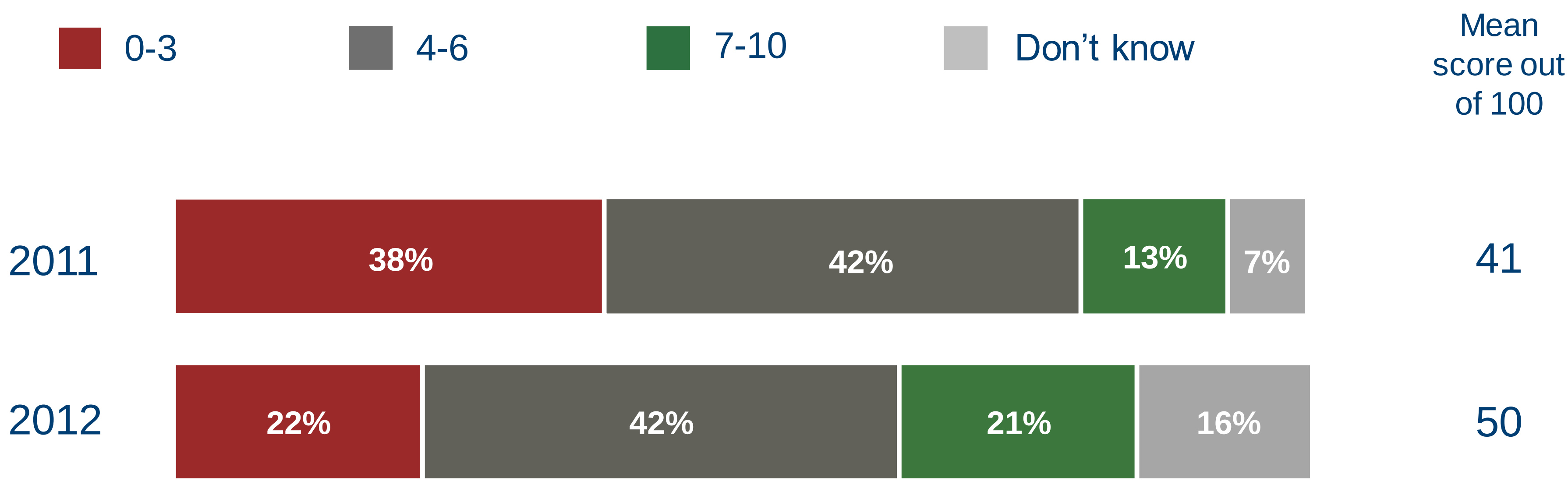
Roads Reputation Drivers – Experience (summary - 2)

- The proportion who disagree that TfL *is successfully managing London's traffic* has dropped by 29 percentage points to just 21% in 2012. However, the overall balance means that confidence remains low, though the gap between those who agree and disagree has narrowed considerably
- Co-ordination and more effective traffic management is cited as something TfL needs to address among those who are not confident, or neutral about TfL's traffic management. Road works, delivery vehicles, buses during peak times, poor traffic lighting and the volume of traffic in London are seen are the main issues that need to be addressed
- Among the few that agree that TfL is successfully managing London's traffic, one in three feel that it has improved and that the congestion charge has had a positive impact
- TfL is no more likely to be seen as a *trusted source of driver information*, though the proportion who disagree this is the case has notably dropped over the past 12 months. However, the balance of opinion is now one of neutrality; three in four are either on the fence (4-6 scores) or don't know enough to give an opinion

Roads Reputation Drivers – Experience

- ....Reduce CO2 emissions from road traffic in London

Experience



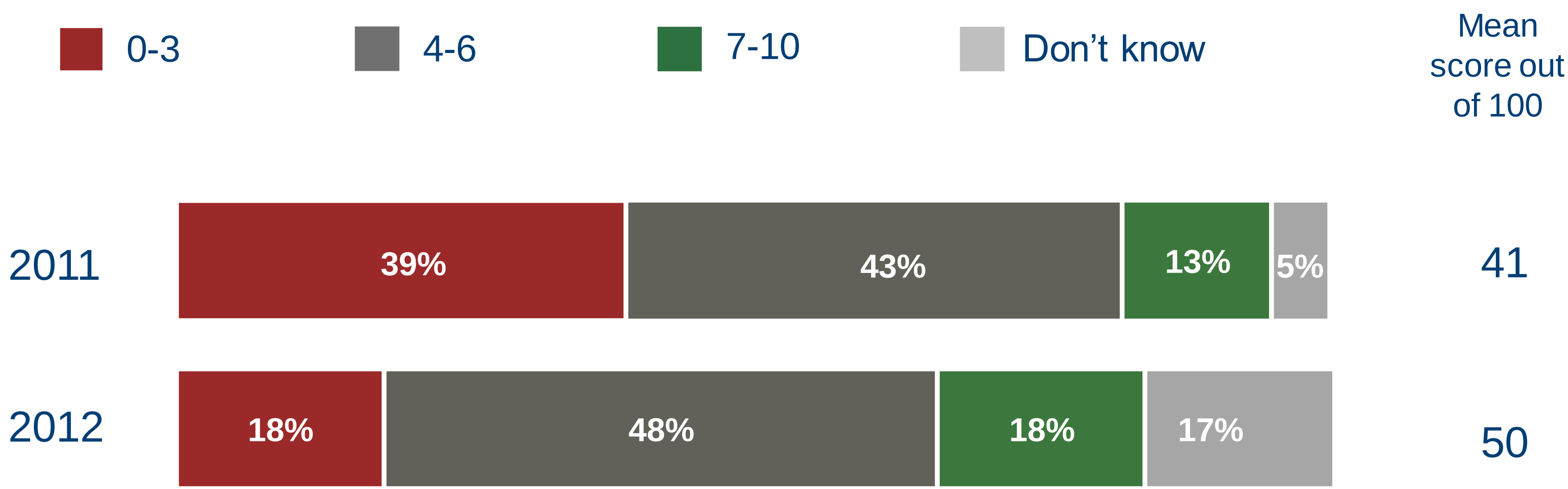
Using a scale of 0 to 10 where 0 means that you have no confidence and 10 that you are fully confident, to what extent do you feel confident that in the next 3 – 5 years, Transport for London will successfully .....

Base: Business Leaders (102), All who have heard of Transport for London, interviewed Sep-Dec 2012

Roads Reputation Drivers – Experience

- … Improve air quality resulting from road traffic in London

Experience



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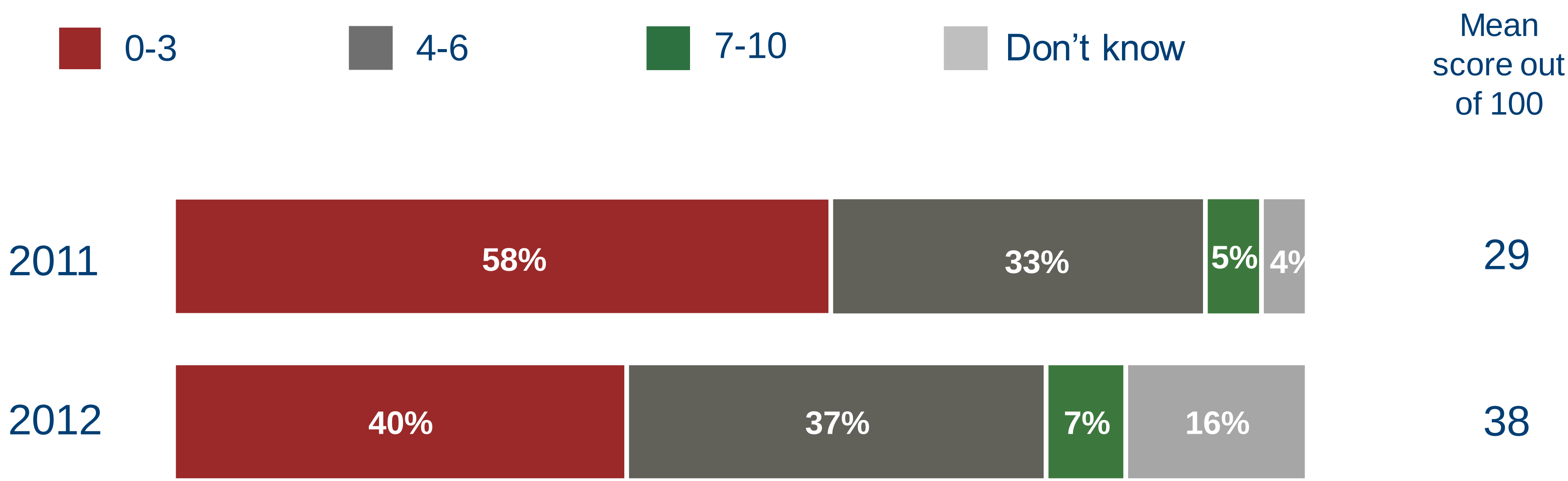
Base: Business Leaders (102), All who have heard of Transport for London, interviewed Sep-Dec 2012

Roads Reputation Drivers – Experience

- …By better planning and co ordination, reduce the traffic disruption caused by roadworks

Experience



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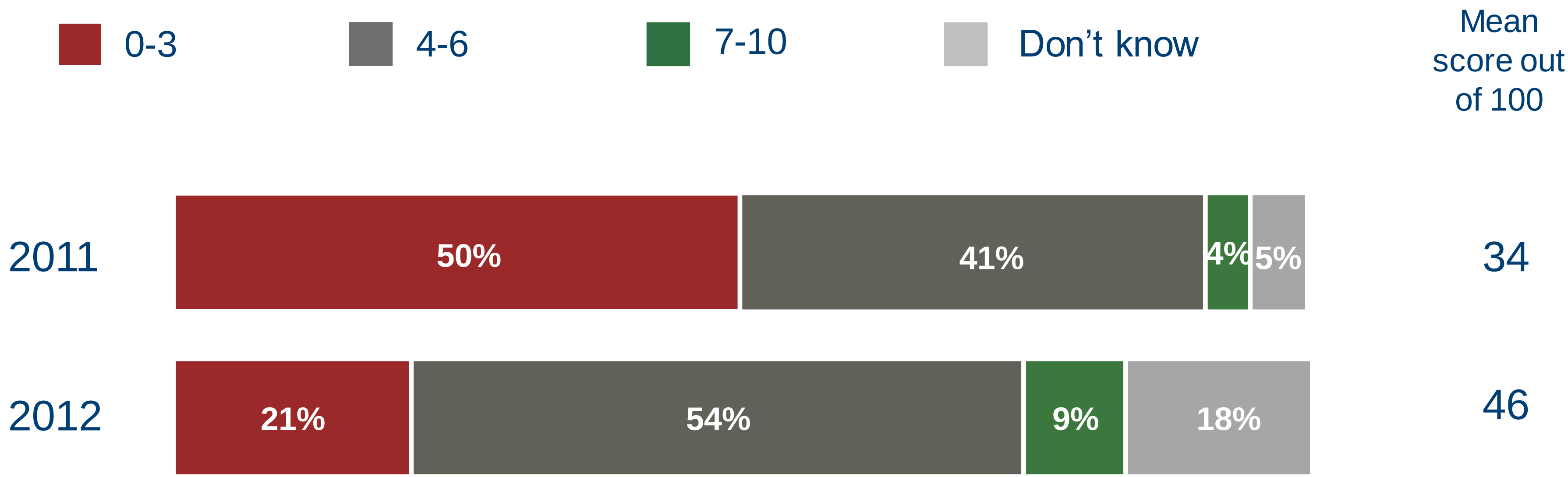
Base: Business Leaders (102), All who have heard of Transport for London, interviewed Sep-Dec 2012

Roads Reputation Drivers– Experience

- …Is successfully managing London's traffic

Experience



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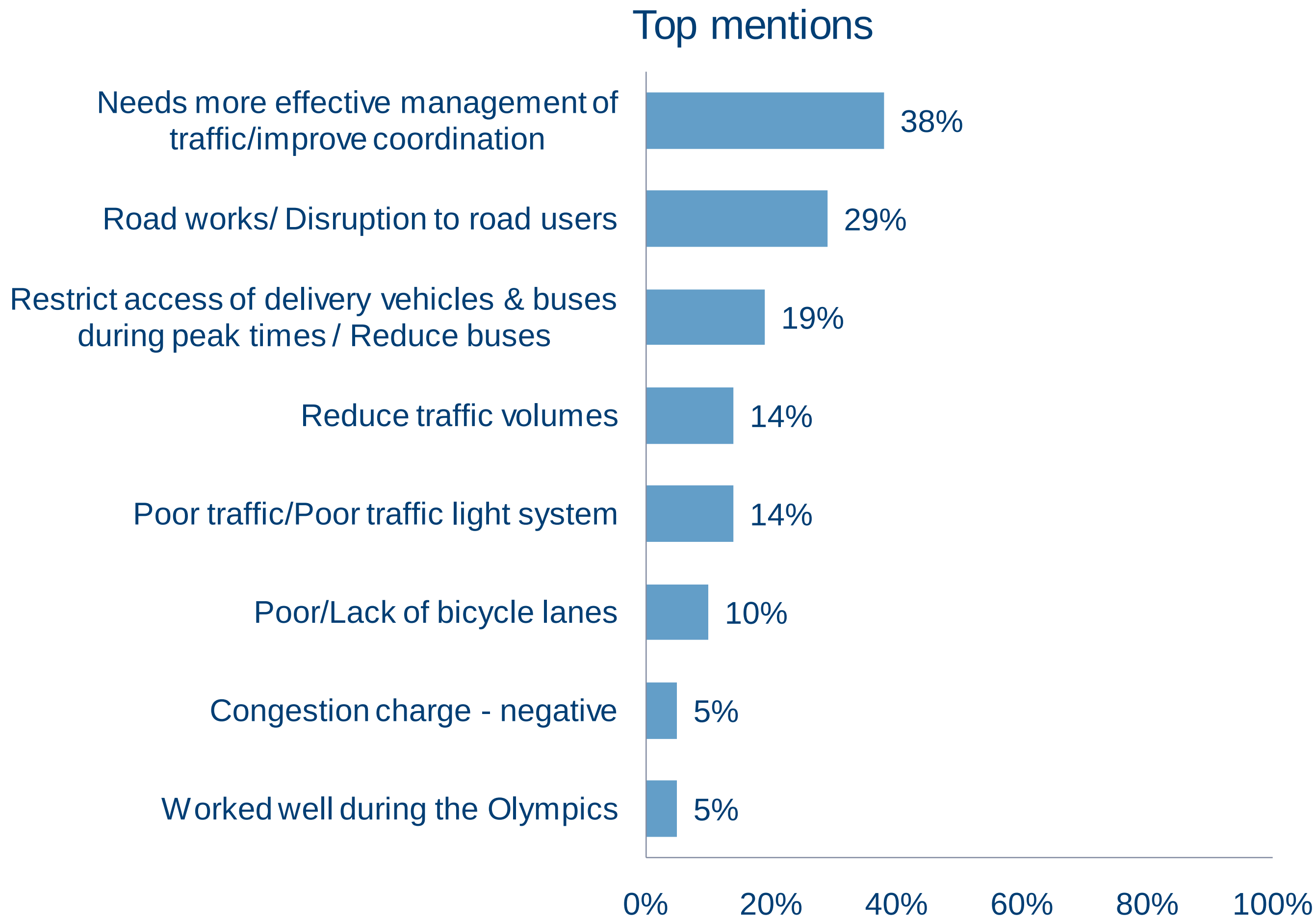
Base: Business Leaders (102), All who have heard of Transport for London, interviewed Sep-Dec 2012

Managing London's traffic – reasons for given a rating of 0-3

Experience

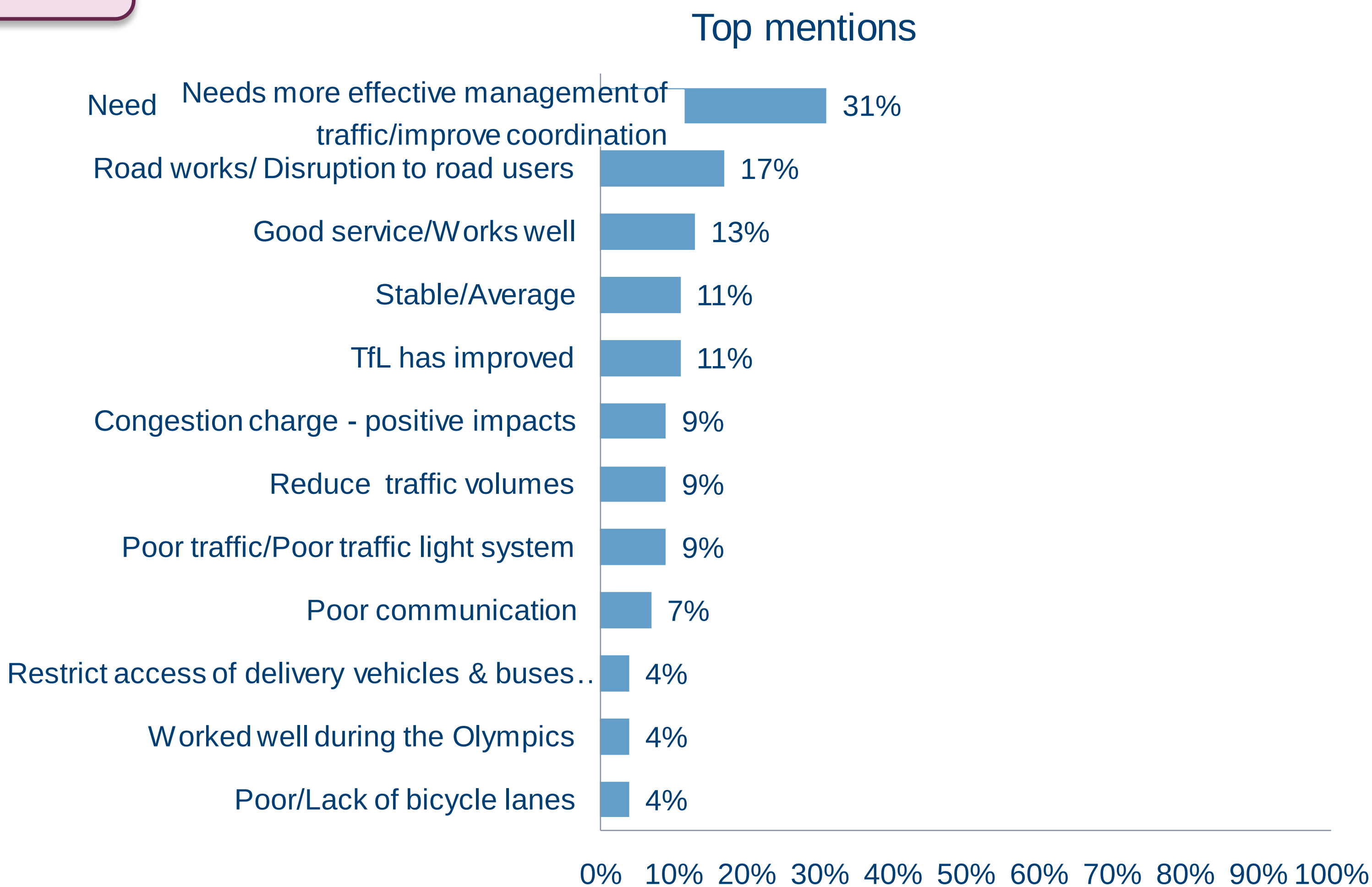


Please note very low base size (21)

Base: Business Leaders (21), All who rated TfL 0-3 for managing London's traffic, interviewed Sep-Dec 2012

Managing London's traffic – reasons for given a rating of 4-6

Experience

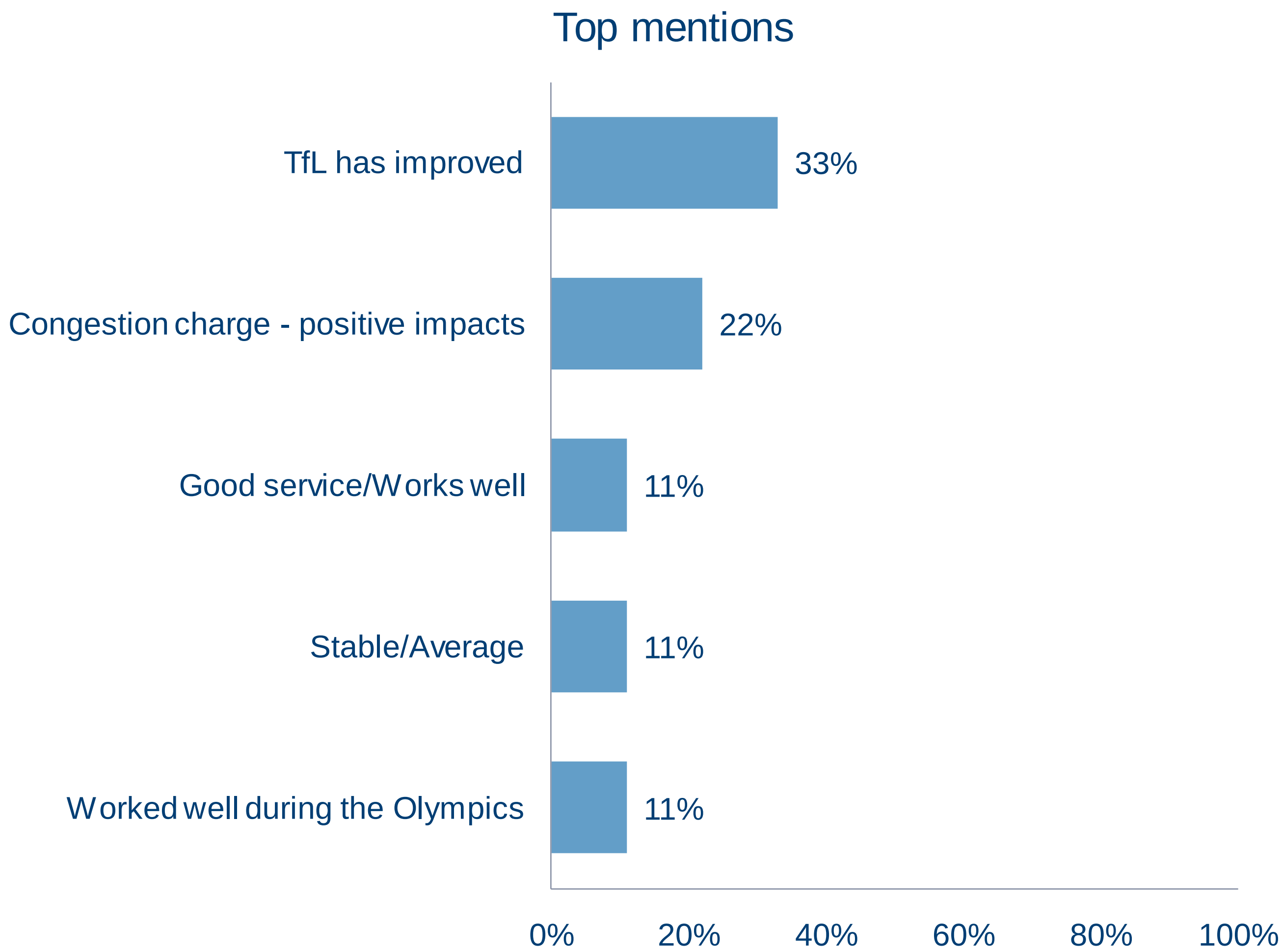


Please note low base size

Base: Business Leaders (54), All who rated TfL 4-6 for managing London's traffic, interviewed Sep-Dec 2012

Managing London's traffic – reasons for given a rating of 7-10

Experience



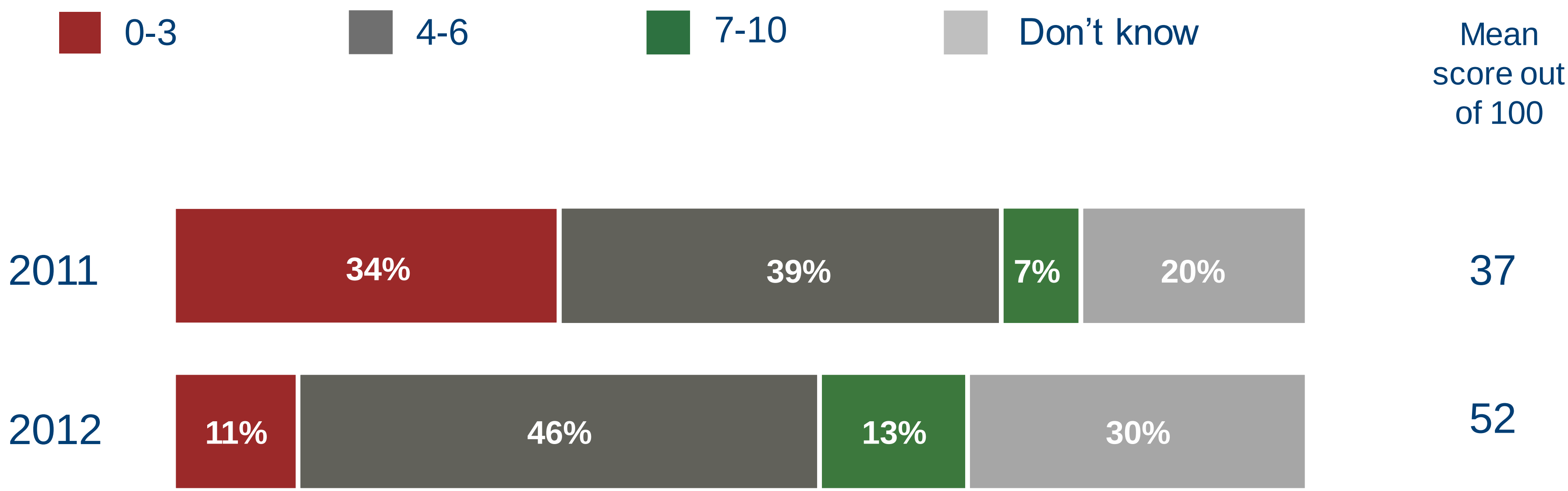
Please note very low base size (9)

Base: Business Leaders (9), All who rated TfL 7-10 for managing London's traffic, interviewed Sep-Dec 2012

Roads Reputation Drivers – Experience

- …is a trusted source of driver information

Experience



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Base: Business Leaders (102), All who have heard of Transport for London, interviewed Sep-Dec 2012

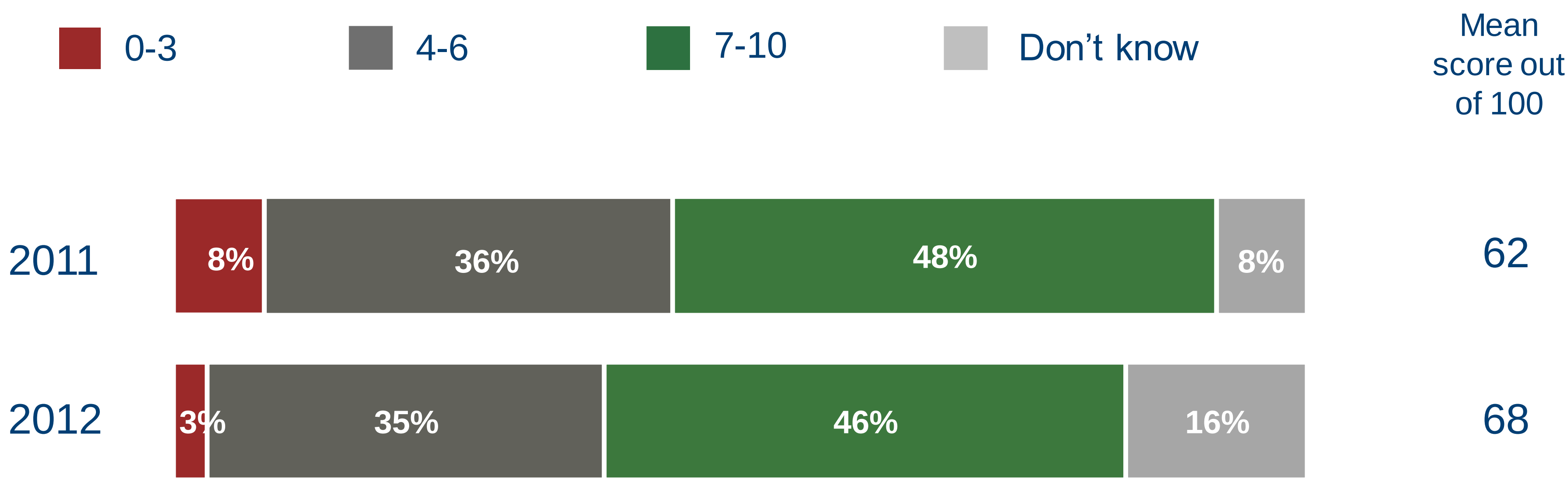
Roads Reputation Drivers – Progress & innovation (summary)

- Looking ahead over the next 3-5 years there is a high level of confidence in TfL's schemes to *encourage more people to cycle*
- There has been little change in the level of confidence year on year, though there has been a slight (but not significant) increase in the proportion not giving an opinion

Roads Reputation Drivers – Progress and innovation

- …Introduce new cycle schemes to encourage more people to cycle

Progress & Innovation



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Base: Business Leaders (102), All who have heard of Transport for London, interviewed Sep-Dec 2012

Surface Transport Section:

London Buses – Reputation drivers

LB Reputation Drivers – What TfL stands for (summary)

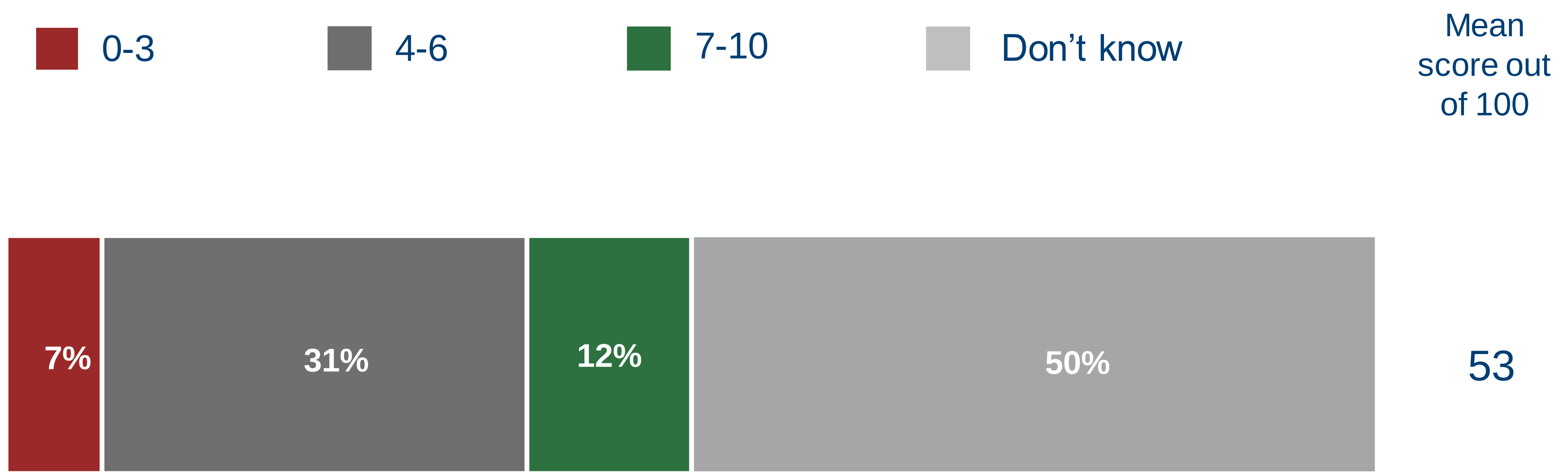
- LB is not especially well rated on *valuing customers and their time* compared to the other attributes. However, this is not due to a notable level of negativity, but due to the high level of 'don't know' responses – 50% don't know enough to give an opinion. This lack of knowledge is linked to familiarity levels with LB. Those who know LB just a little or who have heard of it but know nothing are most likely to say 'don't know' for this metric. There are no notable differences in opinion by office location

- Nonetheless, the balance is positive. Twelve percent agree that LB values customers and their time compared to just 7% who disagree

LB Reputation Drivers – What TfL stands for

- ...Values customers and their time.

What TfL stands for



To what extent do you feel that each of the following statements applies to London Buses, using a scale of 0 to 10 where 0 means that you strongly disagree and 10 means that you strongly agree?

Base: Business Leaders (102), All who have heard of London Buses, interviewed Sep-Dec 2012

LB Reputation Drivers – Experience (summary)

- There has been little year-on-year change in perceptions of LB *'improving bus journey time reliability'*

- As a consequence of more respondents stating 'don't know', the proportion who either agree or disagree has not changed since 2011. However, the overall mean score has improved

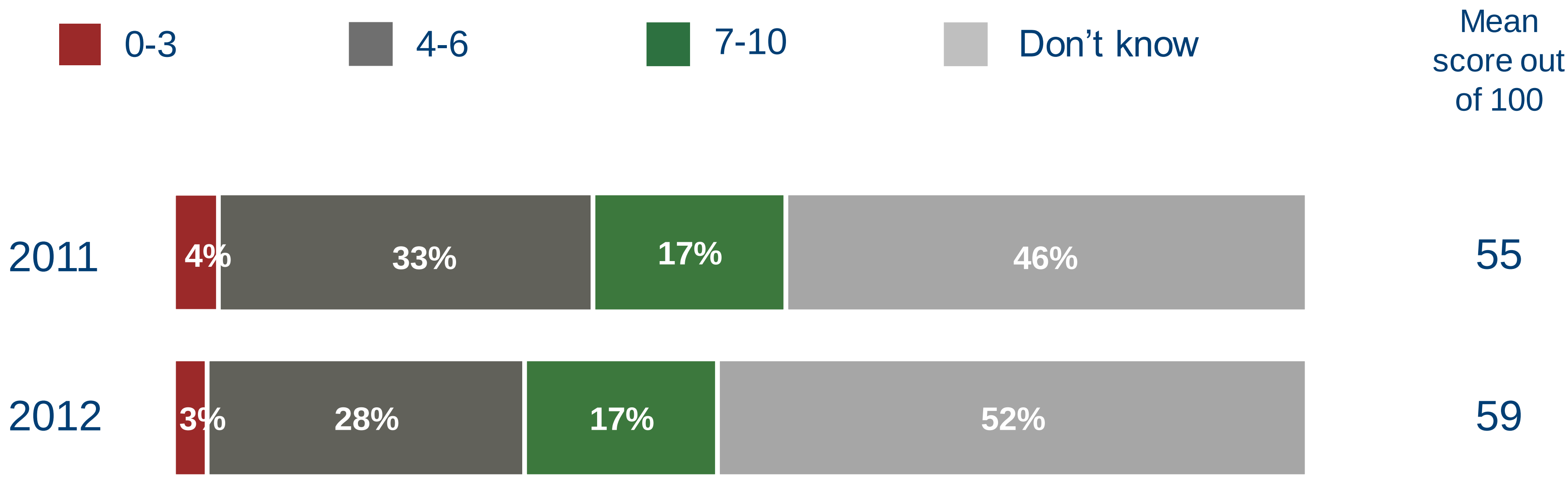
- The proportion saying don't know has risen (up from 46% to 52%) and again, this is driven by those with a lower level of familiarity with LB

- Overall, LB is slightly more likely to be seen to *deliver a good bus service for its customers* than in 2011, thanks to a notable decline in the proportion who disagree and a corresponding rise in the percentage who agree this is the case

LB Reputation Drivers – Experience

- ....Is improving bus journey time reliability

Experience



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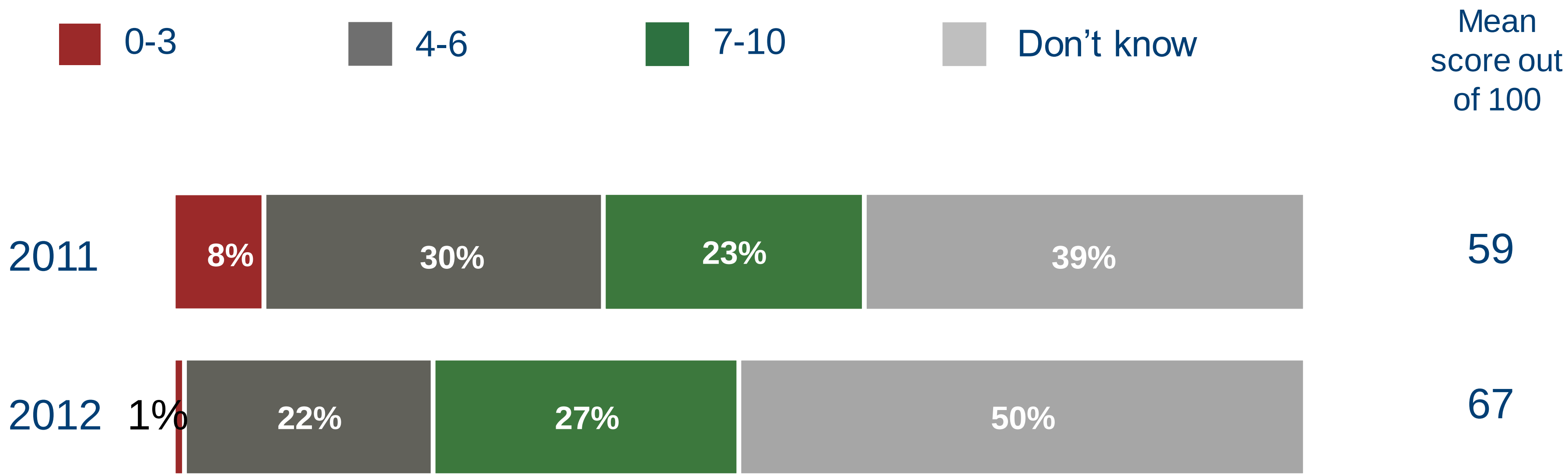
Base: Business Leaders (102), All who have heard of London Buses, interviewed Sep-Dec 2012

LB Reputation Drivers – Experience

- …is delivering a good bus service for customers

Experience



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Base: Business Leaders (102), All who have heard of London Buses, interviewed Sep-Dec 2012

LB Reputation Drivers – Progress & innovation (summary)

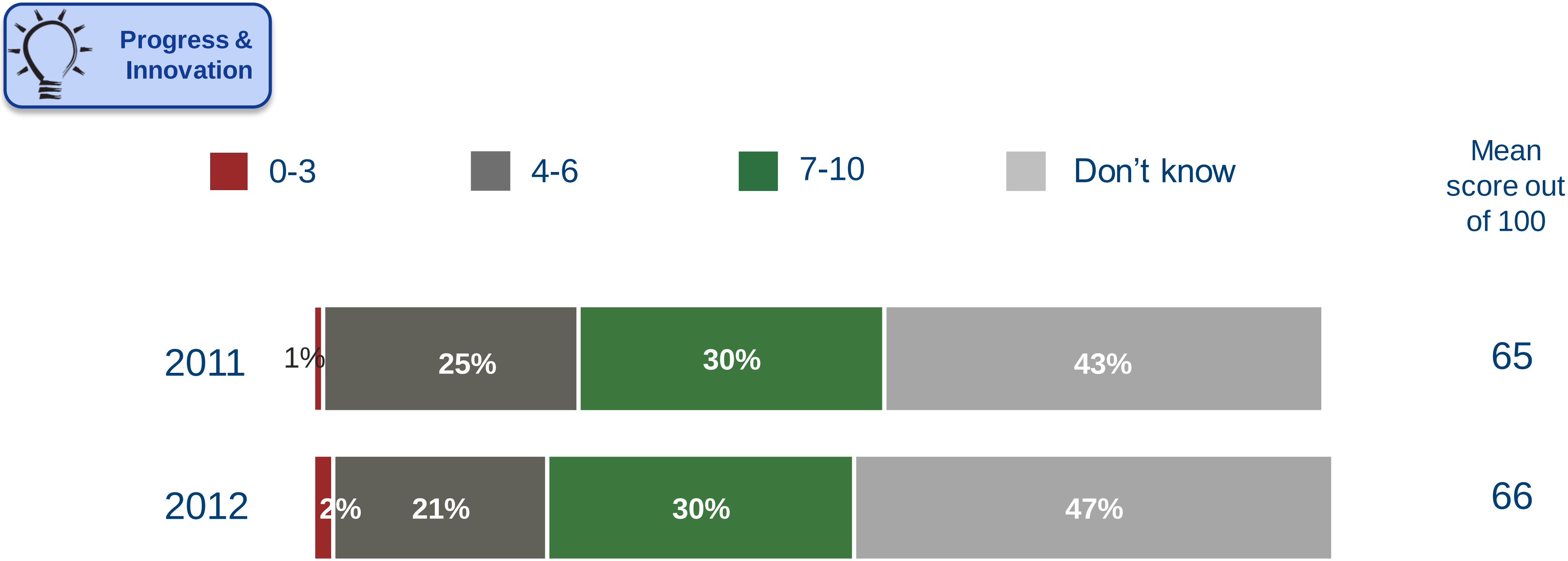
- The level of agreement that LB is *investing in improved bus information for customers* has not moved in the past year. As with other attributes, there is a high proportion of 'don't know' responses as a result of a low level of familiarity with the service

- There has been a notable (though not strictly significant) improvement in agreement that LB is *introducing buses which have a lower negative impact on the environment*

- Agreement (scores of seven or more out of ten) has risen from 28% in 2011 to 37% this year. Furthermore, none disagree. However, the proportion of 'don't know' responses are up, once more due to Business Leaders with low-level familiarity with LB

LB Reputation Drivers – Progress and innovation

- …is investing in improved bus information for customers



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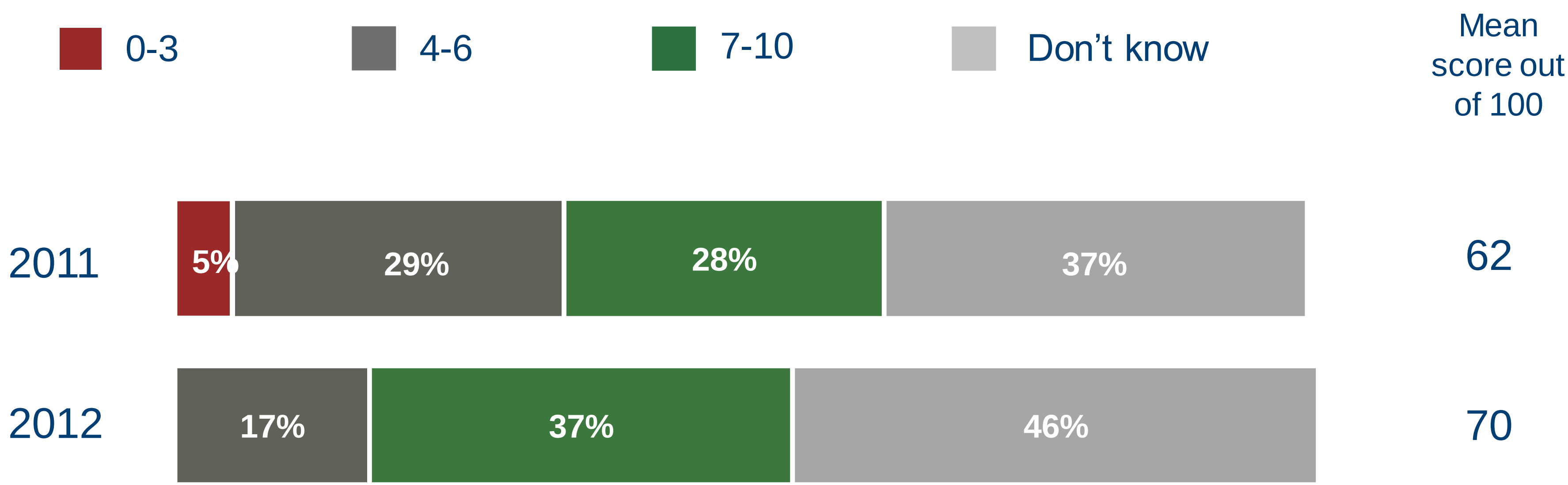
Base: Business Leaders (102), All who have heard of London Buses, interviewed Sep-Dec 2012

LB Reputation Drivers – Progress and innovation

- …is introducing buses which have a lower negative impact on the environment

Progress & Innovation



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Base: Business Leaders (102), All who have heard of London Buses, interviewed Sep-Dec 2012

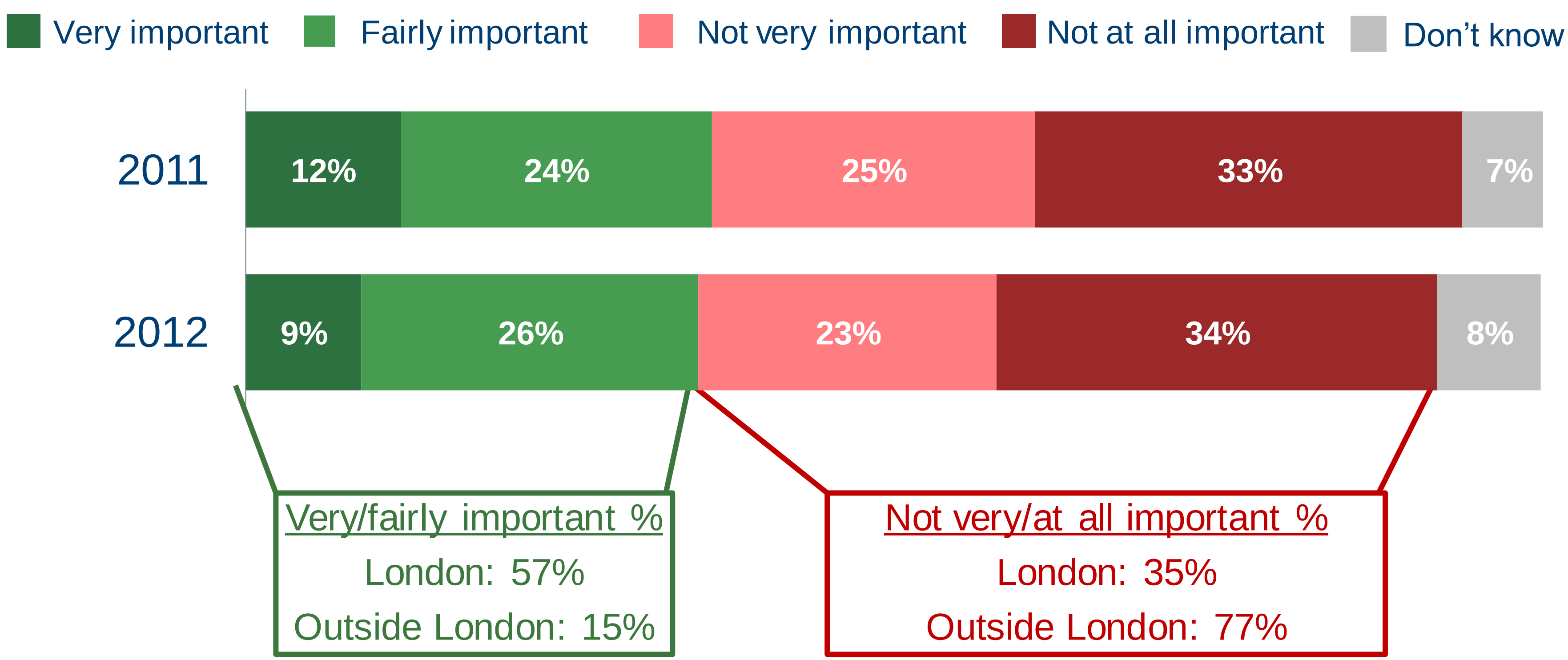
LB Reputation Drivers – Value (summary)

- There has been little change over the year in *how important a good service from LB is to businesses*. Overall, 57% do not see it as important to their business, compared to 35% who do
- However, this is driven in part by office location. Those based in London are more likely to see the service LB provides as important to their business than those whose office is based outside London
- For the other measures of 'value', low-level familiarity is again resulting in large 'don't know scores'. However, the balance of opinion for each attribute is still positive
- On '*provides good value for money*' nearly three in ten (28%) agree this is the case, compared to just three percent who do not. However, nearly half (49%) don't know enough to give an opinion
- Views on whether LB is *providing a bus service which helps London's economy* have also improved slightly, again mostly due to a drop in the proportion who disagree (down seven points from ten percent)

LB Reputation Drivers – Value

Value

- How important would you say that a good service from London Buses is to your business?

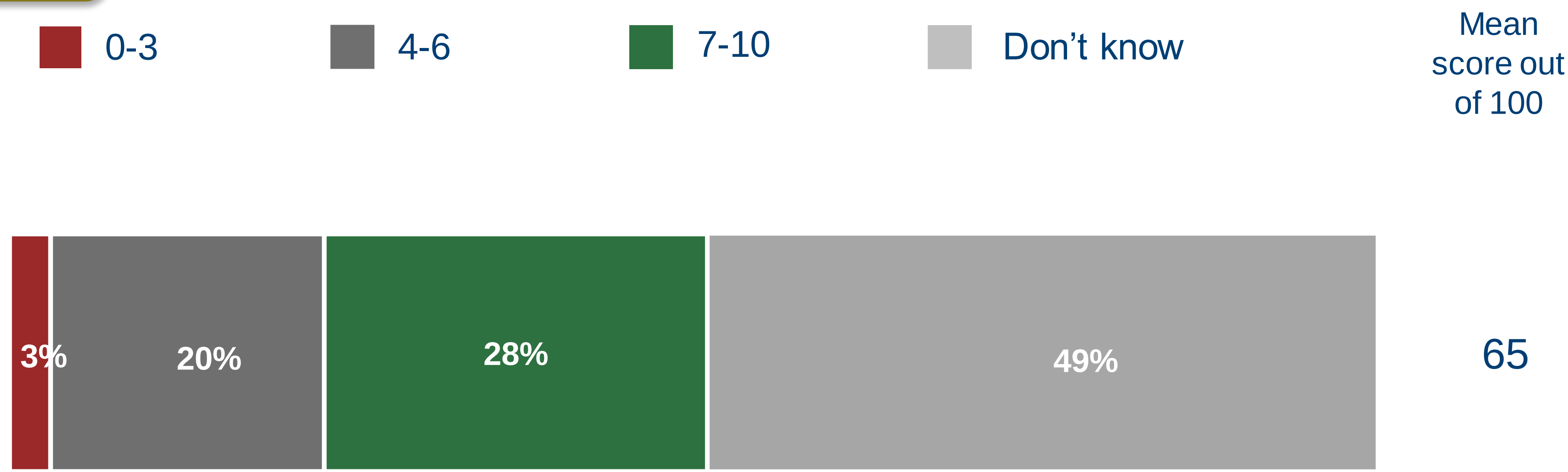


Base: Business Leaders (102), All who have heard of London Buses, interviewed Sep-Dec 2012

LB Reputation Drivers – Value

- ....provides good value for money

X=Y×2 Value



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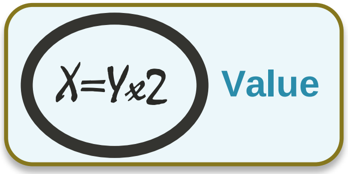
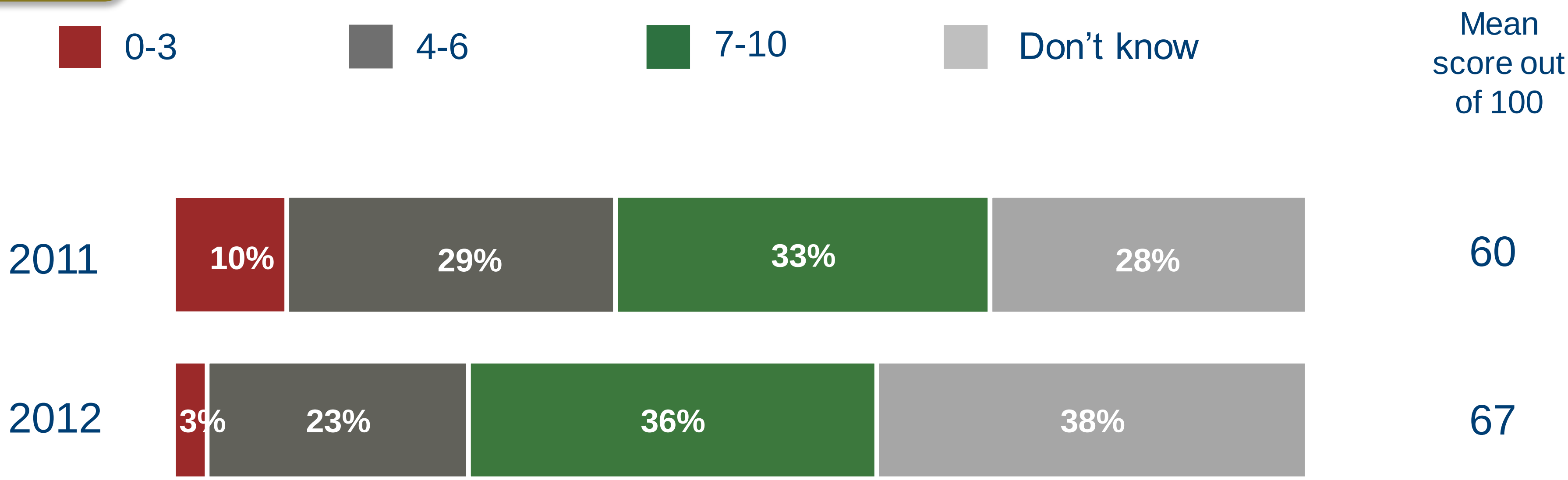
Base: Business Leaders (102), All who have heard of London Buses, interviewed Sep-Dec 2012

LB Reputation Drivers – Value

- …is providing a bus service which helps London's economy





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Base: Business Leaders (102), All who have heard of London Buses, interviewed Sep-Dec 2012

London Underground Section:

Reputation drivers

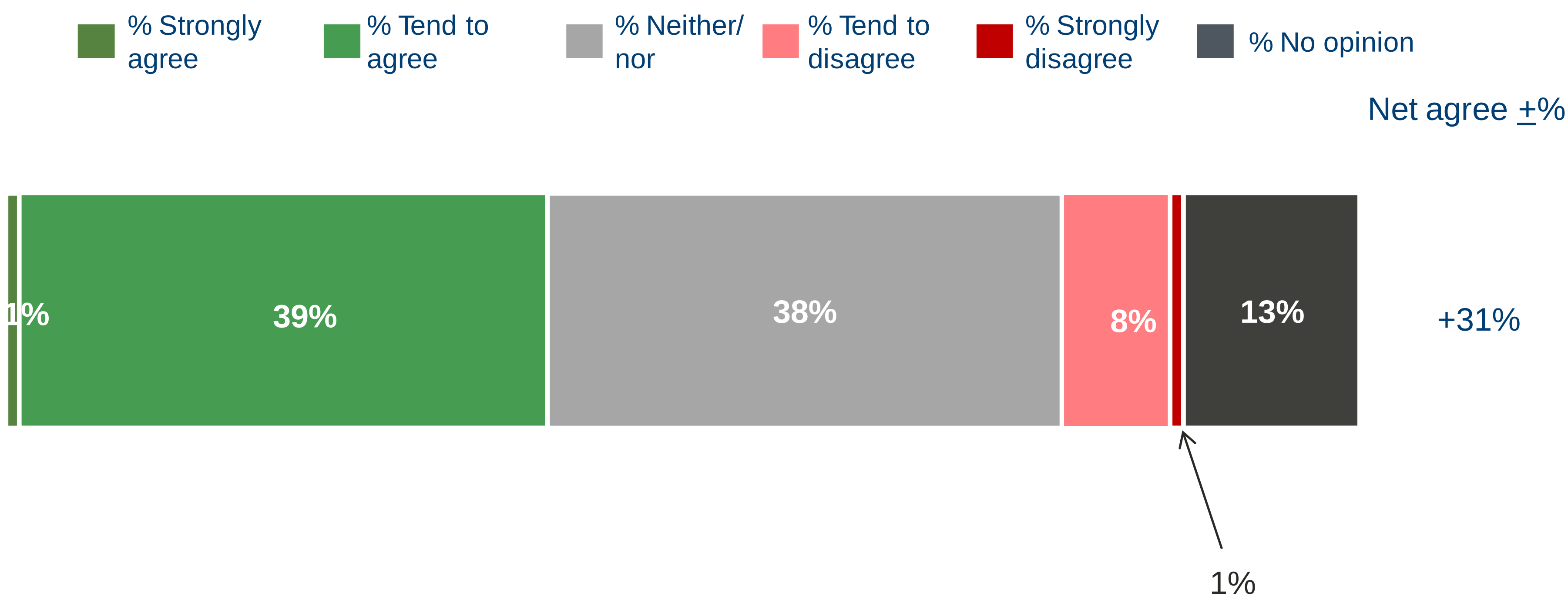
LU Reputation Drivers – What TfL stands for (summary)

- LU is well rated on its communication about future plans; 40% agree this is the case, while just 9% disagree

LU Reputation Drivers – What TfL stands for

- ....Communicates honestly and openly about its plans for the future

What TfL stands for



Q To what extent do you agree or disagree with the following statements? London Underground......

Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

LU Reputation Drivers – Experience (summary)

- Just over three in five (62%) of Business Leaders use the Underground on a regular basis, and a further one in five (21%) use it occasionally. Due to the high level of LU usage, it is highly likely that their experiences of as service users as well as stakeholders are colouring their opinions of the overall level of service

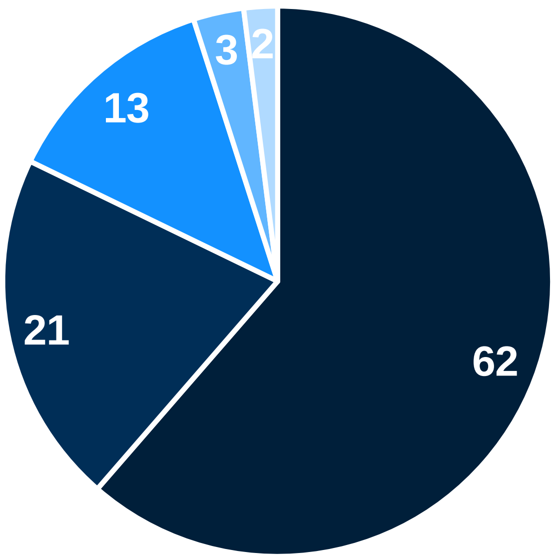
- Ratings of the overall level of service have significantly improved in the past year. Three in four give the overall level of service top ratings of seven or more out of ten this year, up 28 percentage points since 2011. Furthermore, this year none of those asked have a negative view of the overall service level

Experience of travel by London Underground

Experience

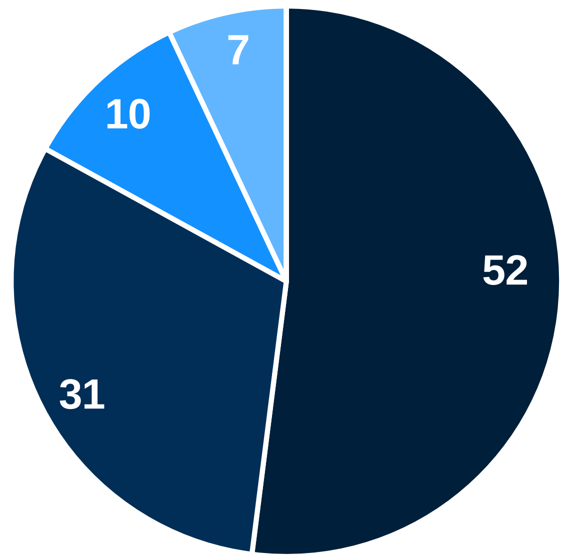
■ % Regularly ■ % Occasionally ■ % Hardly ever ■ % Never ■ % Don't know

2012



Regularly/occasionally:
82%

2011



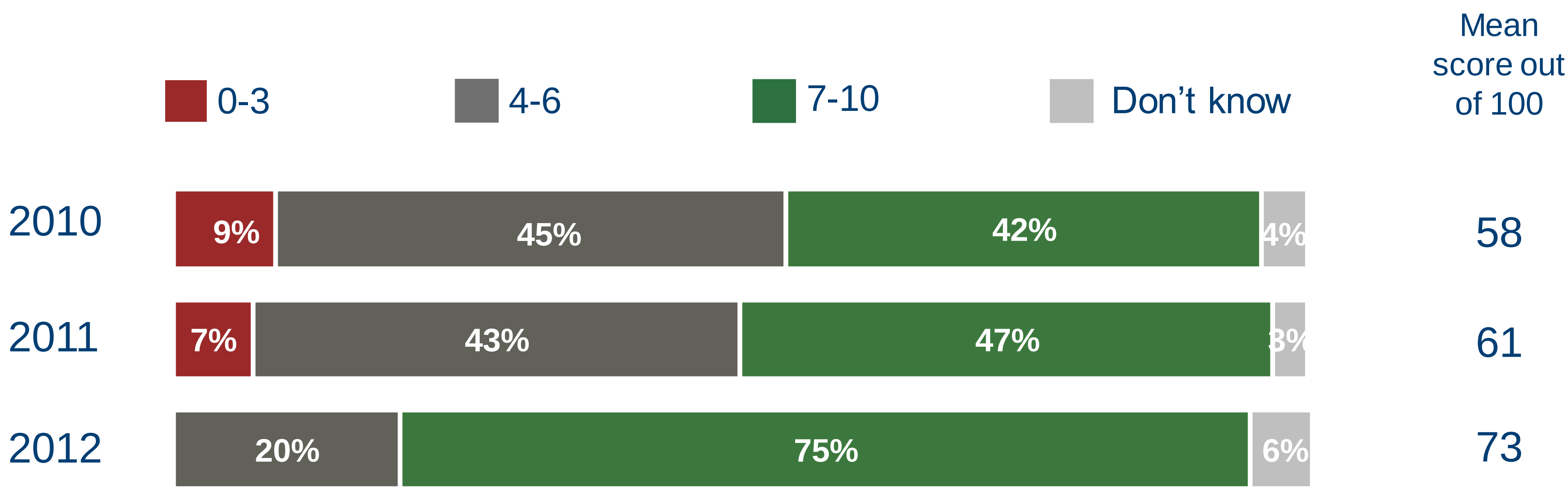
Regularly/occasionally:
83%

Q How often, if at all, do you personally travel by London Underground?

Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

Overall level of service

Experience



Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

LU Reputation Drivers – Value (summary)

- Overall, Business Leaders are divided on how important a good service from LU is to their business and there is a clear split in opinion based on office location. A good service from LU is seen as important by the majority (78%) of those with offices in London, compared to just 28% of those based outside London

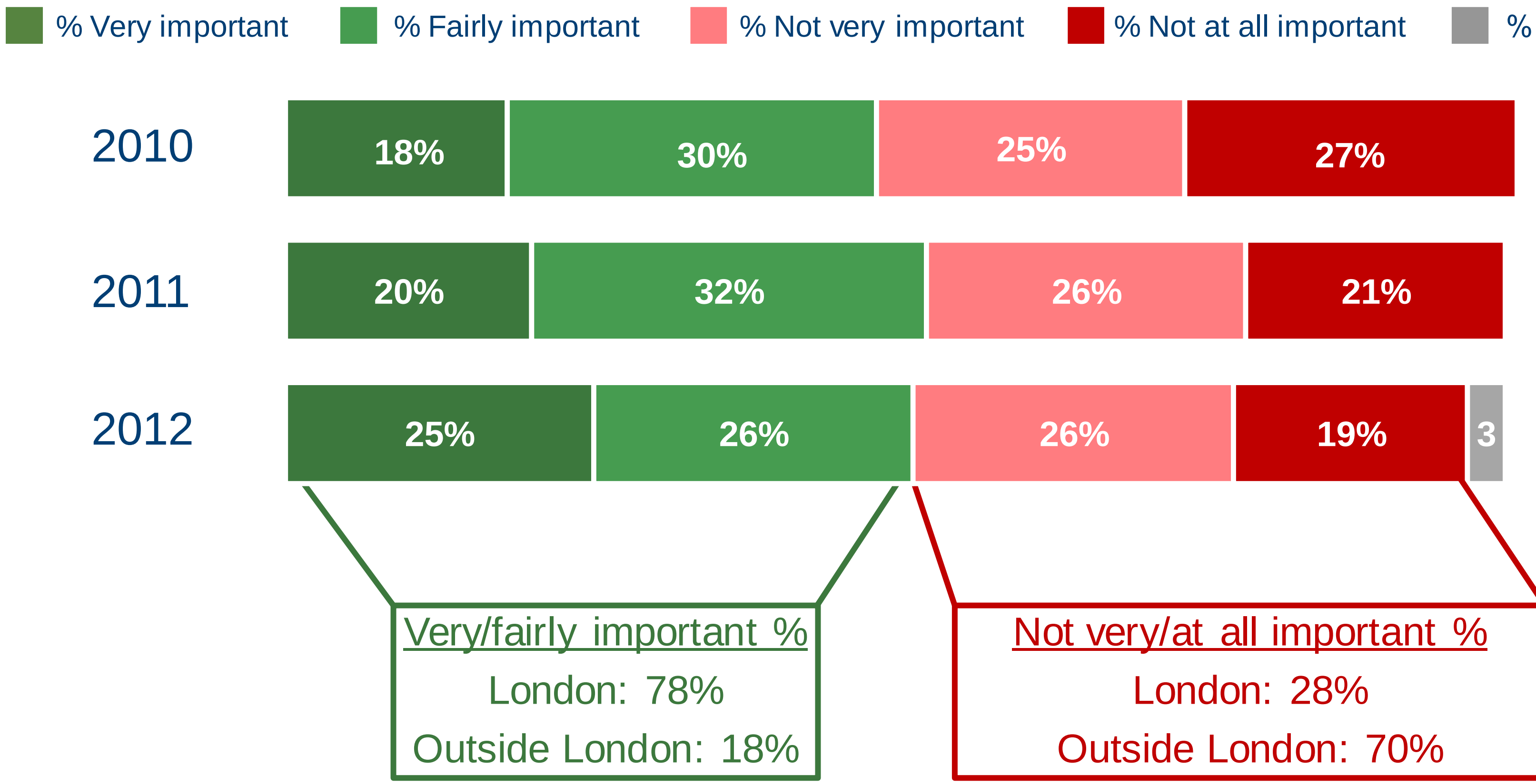
- LU is well regarded on value for money. Over two in three agree that LU *provides good value for money,* while just 18% disagree

- Perceptions of LU being *a well managed organisation* have significantly improved. Agreement has increased by 29% percentage points, meaning around half now see it as well managed. Meanwhile disagreement has also significantly dropped from 17% to just four percent

Importance of a good service from London Underground is to business

- Turning to your business, how important would you say a good service from London Underground is to your business?

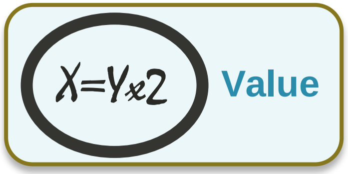
Value

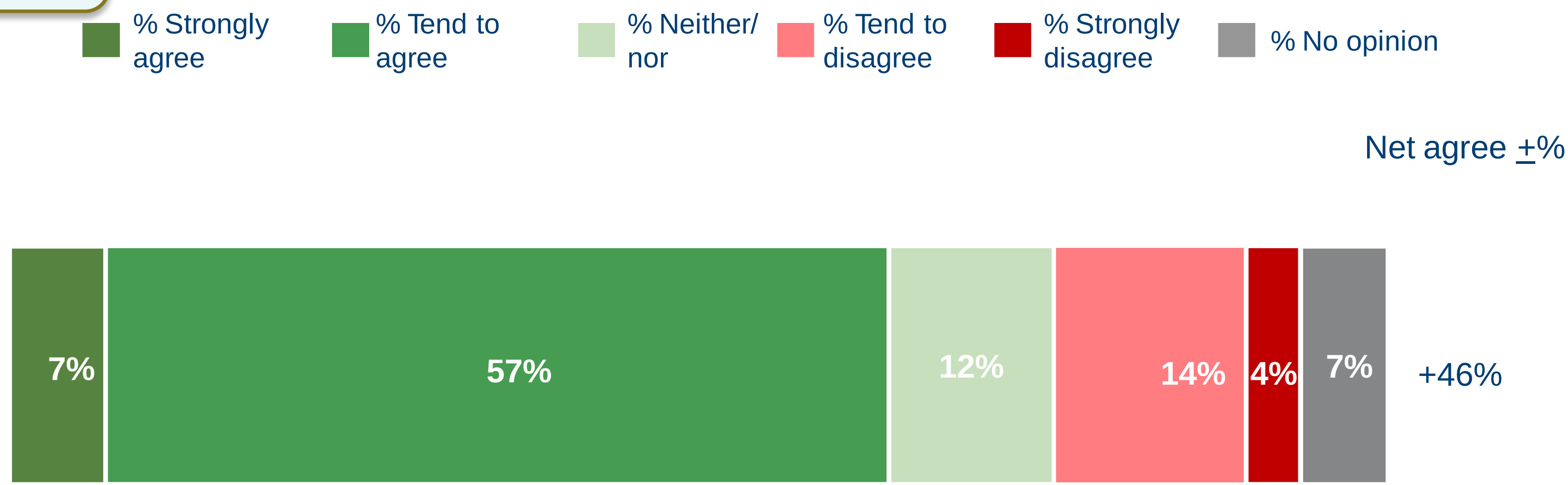


Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

LU Reputation Drivers – Value

- ....provides good value for money





Q To what extent do you agree or disagree with the following statements? London Underground......

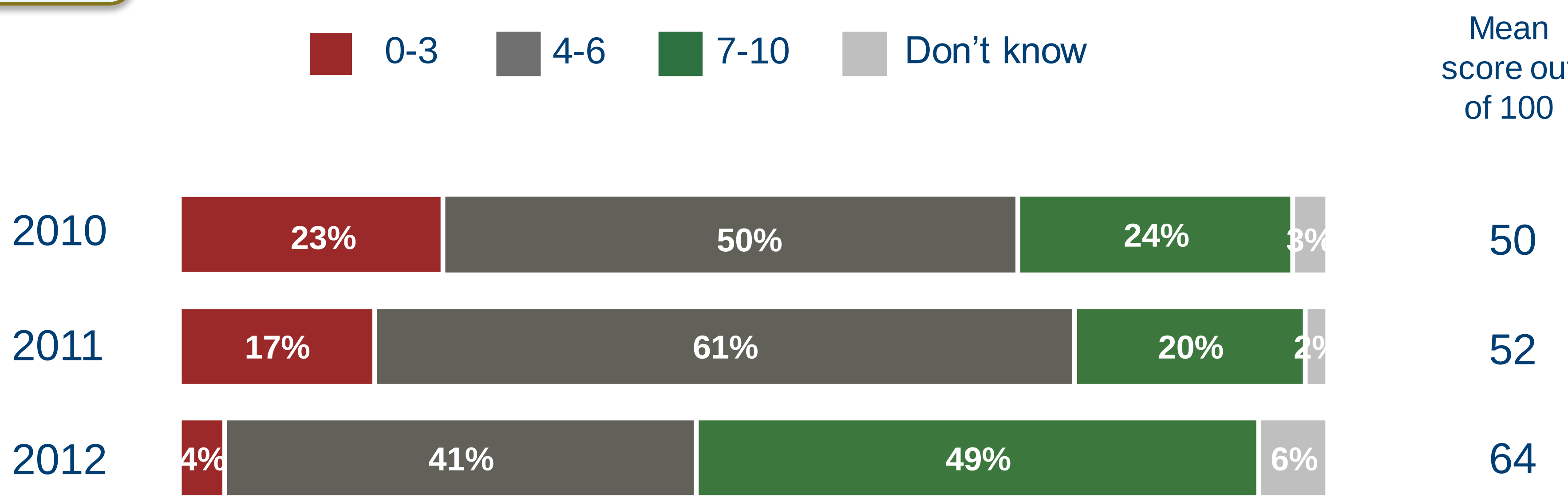
Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

LU Reputation Drivers – Value

Transport for London

- ....is a well managed organisation

Value



Q To what extent do you agree or disagree with the following statements? London Underground......

Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

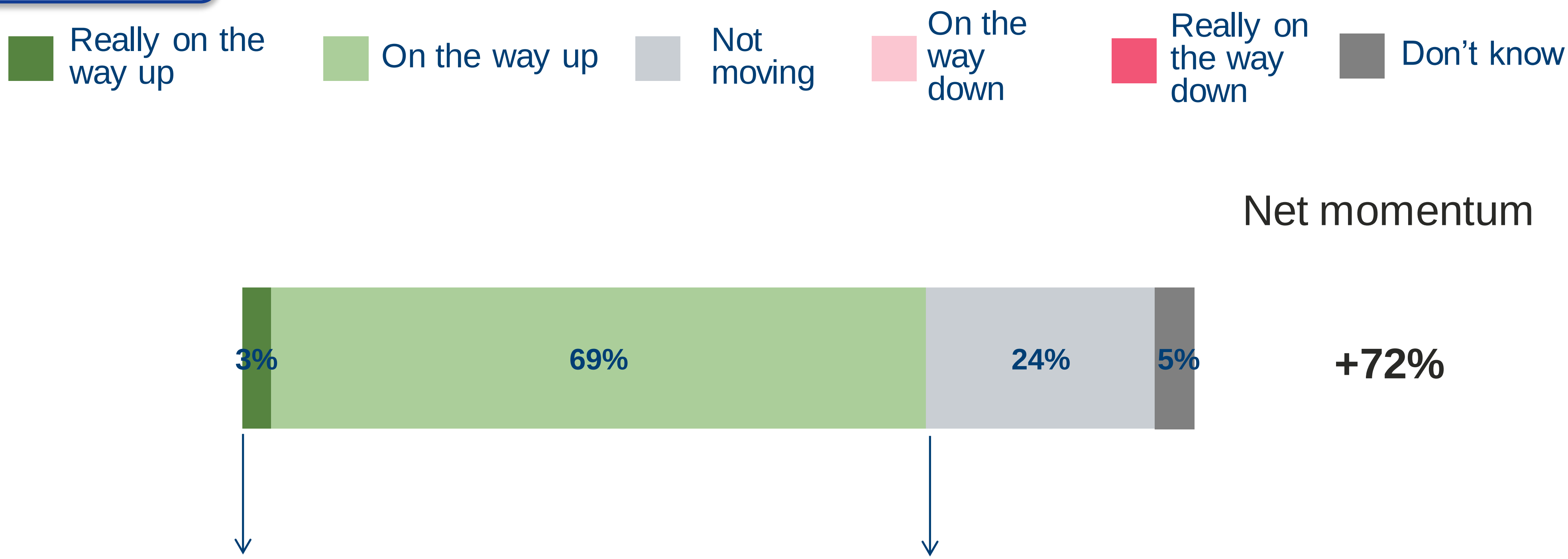
LU Reputation Drivers – Progress & innovation (summary)

- Scores on LU's momentum are highly positive. Most Business Leaders (72%) see LU as an organisation on its way up, while none believe it is on the way down

LU Momentum

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

Progress & Innovation



Net momentum

+72%

Heading upwards: **72%**

Heading downwards: **0%**

Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

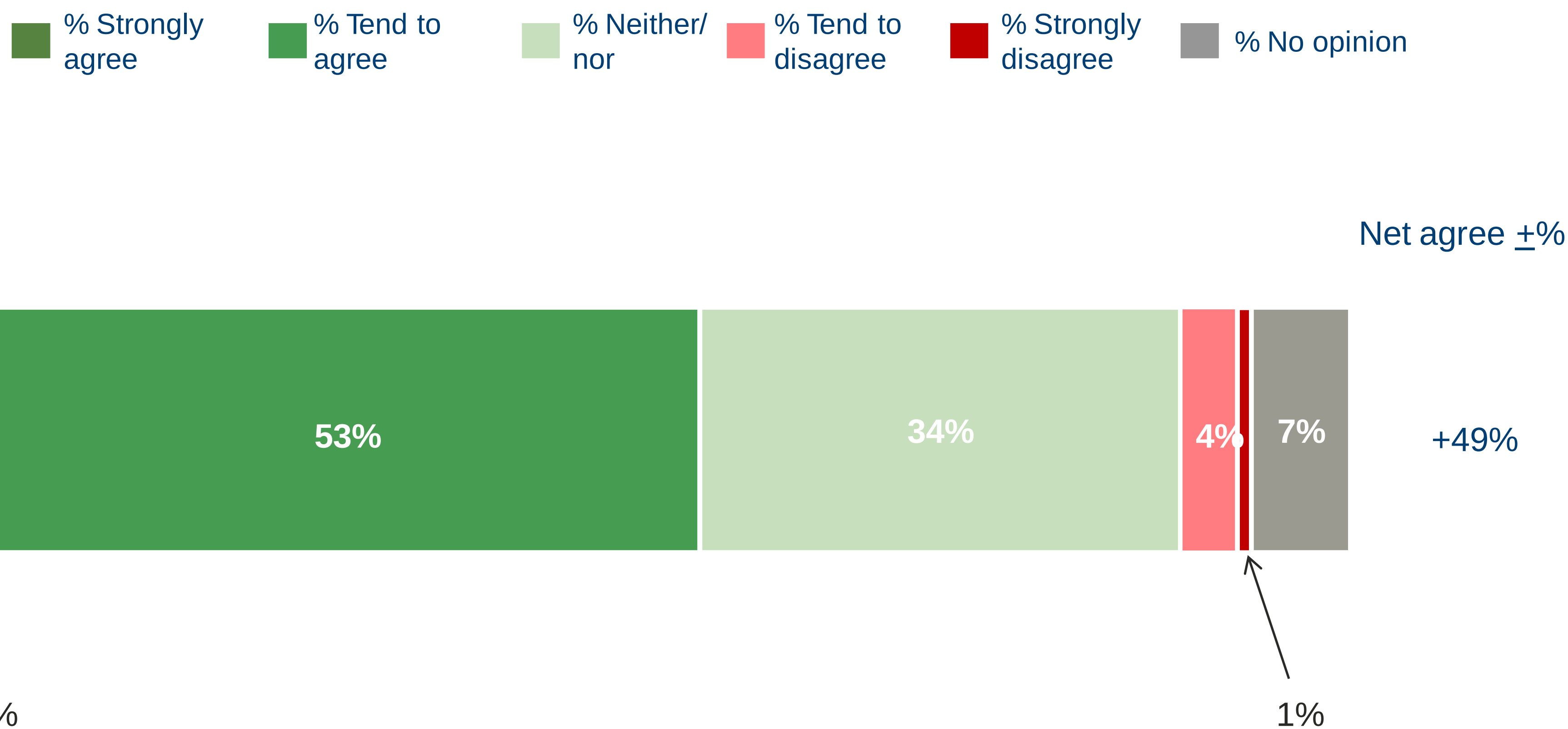
LU Reputation Drivers – Trust (summary)

- LU is very highly regarded on Trust, reflecting the improved favourability and advocacy scores
- 54% believe that *LU is an organisation I can trust*, while very few – just five percent - disagree

LU Reputation Drivers - Trust

- ...Is an organisation I can trust.

Trust



Q To what extent do you agree or disagree with the following statements? London Underground......

Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

London Underground Section:

Strengths and Weaknesses

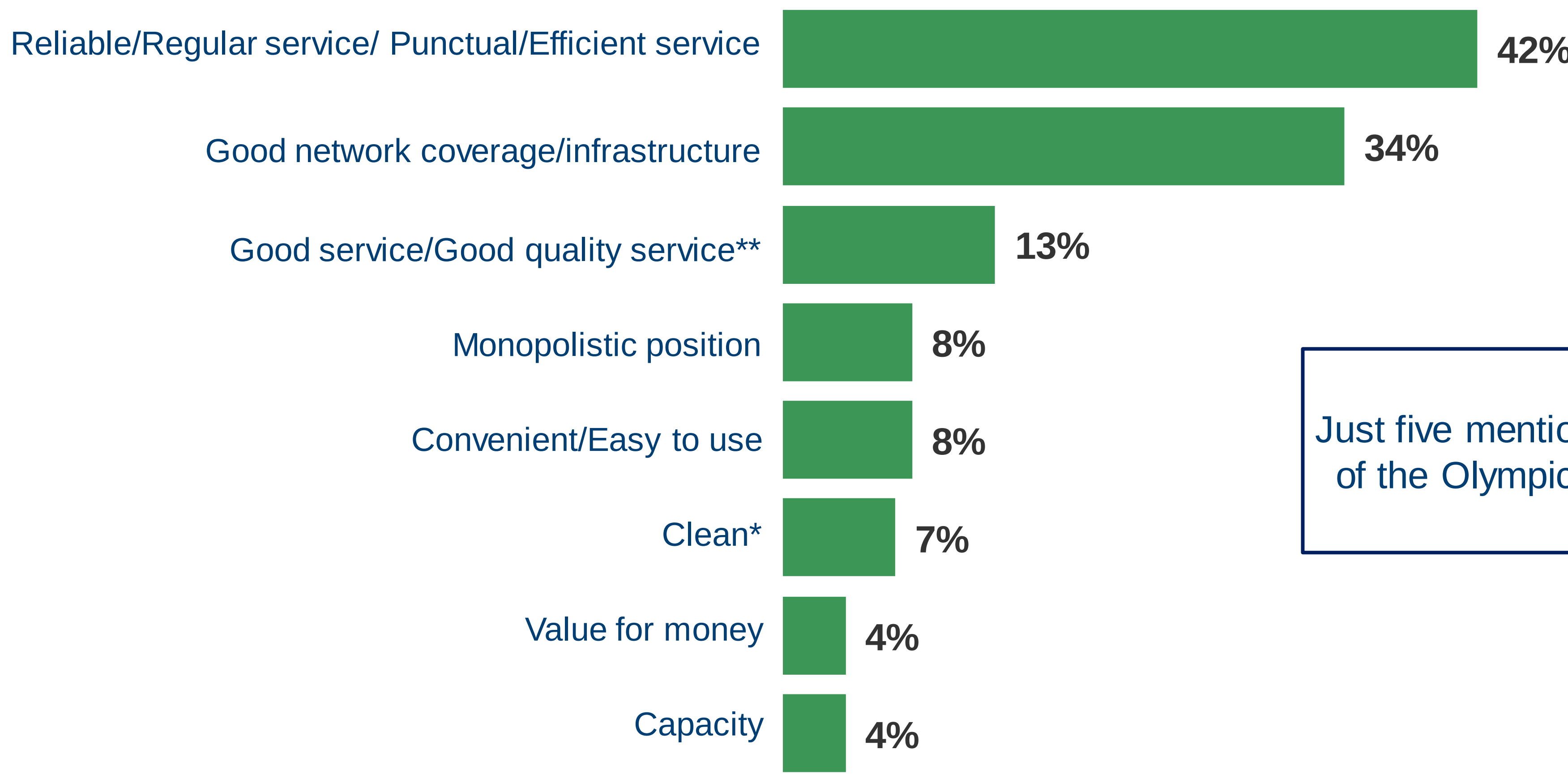
LU - Strengths

- LU's main strengths in the eyes of Business Leaders are its service (reliability, regularity, efficiency) and its extensive network/infrastructure
- Other perceived strengths are the ease of use, cleanliness, capacity and value for money
- The performance of the service during the Olympics is cited by five people. This may be contributing to the improvement in scores overall, but it does not appear that it is this alone that is driving the upward movement in LU's standing among Business Leaders

LU's key strengths: Reliability and coverage

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

Top Mentions



Just five mentions of the Olympics

Please note small base size

Base: Business Leaders (101), All who know at least a little about London Underground, interviewed Sep-Dec 2012

LU's strengths - Verbatim

"We have a transport system that has been well tested and tried and dealt with the passengers throughout the Olympics. I can't remember the numbers but it was a phenomenal number and it coped well. The coaches were clean and the staff were courteous, and if that carries on after the Olympics and that is the legacy we leave, that is a good mark for London Underground"

"They have a really excellent product, in practice, they do what we want them to do. I am quite impressed with their modernisation, they are managing to finance the upgrade of a network that hasn't been upgraded for a long time. You do notice that things are getting better and it is very reliable"

"It provides a very regular service, it goes virtually everywhere, it is comprehensive, it runs for most of the day and everyone moans and groans about it, but the bottom line is it does what it is supposed to do. They provide a good service considering what we pay for their service"

"They have a really excellent product, in practice, they do what we want them to do. I am quite impressed with their modernisation, they are managing to finance the upgrade of a network that hasn't been upgraded for a long time. You do notice that things are getting better and it is very reliable"

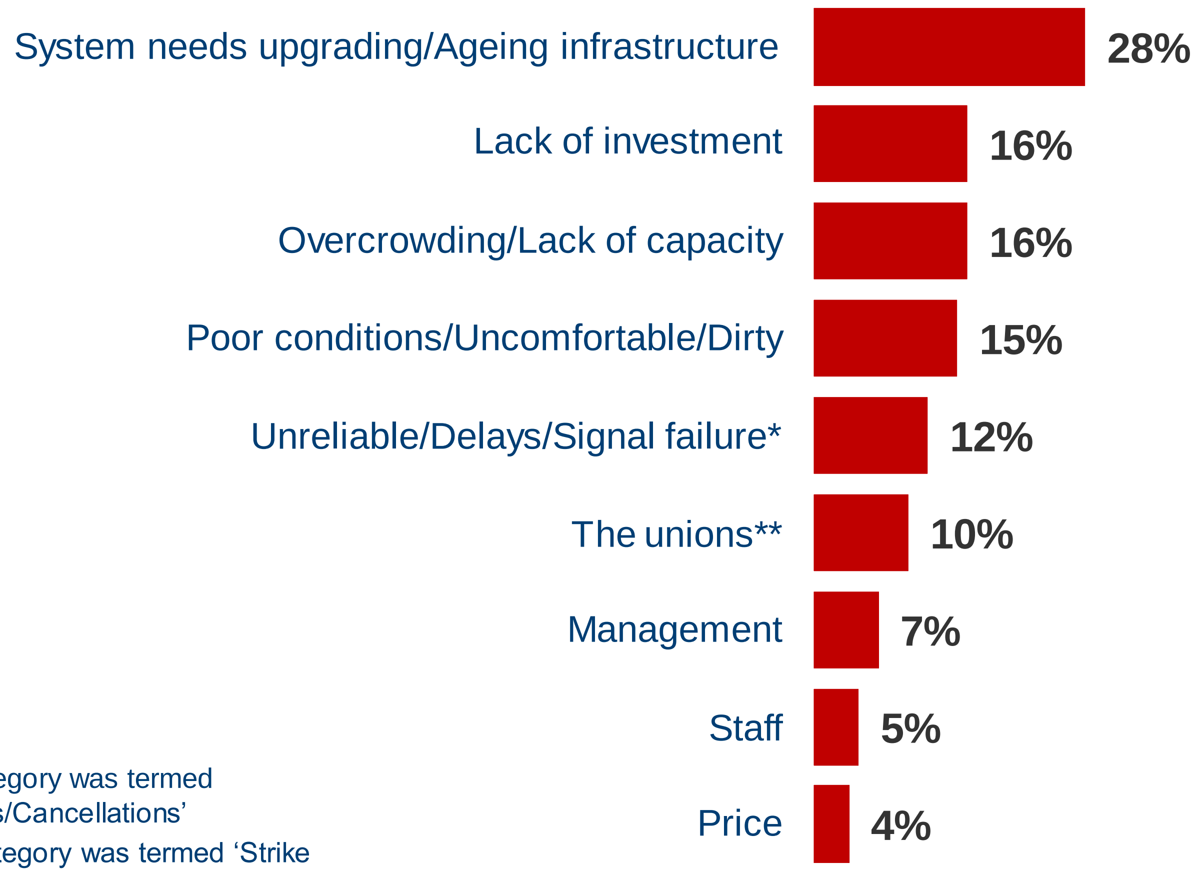
LU - Weaknesses

- Business Leaders see LU's ageing infrastructure is seen as its main weakness. Indeed, most mentions of LU's weaknesses focus on investment related issues (or indeed the need for investment). There are some perceptions of a lack of investment and that some aspects of the network are in need of an upgrade; such as signalling, capacity and the cleanliness and comfort of the rolling stock

LU’s key weaknesses: Ageing infrastructure and a lack of investment

- What would you say are London Underground’s major weaknesses?

Top Mentions



Please note small base size

*In 2011, this category was termed ‘Unreliable/Delays/Cancellations’

**In 2011, this category was termed ‘Strike action/problems with the unions’

Base: Business Leaders (101), All who know at least a little about London Underground, interviewed Sep-Dec 2012

LU's weaknesses - Verbatim

A little bit outdated, no air conditioning and no mobile network in most of the tunnels. Their biggest problem is Bob Crow and the unionised control

Continued underinvestment and continuing issues with Bob Crow and the trade union

Image. It is not a world leading subway system, I think the local community puts up with it, when foreigners come they find it not necessarily world leading, it is as good as the New York subway but not as well run or as sophisticated as other subways and the impression of the average person is that it is somewhat constrained by its ability to invest for the future. It suffers from being a public institution

Crumbling infrastructure, fix that and it fixes pretty much everything

Ageing infrastructure, they haven't spent enough to upgrade the network. Some of the problems with unreliability is because it needs replacing, the rails. I am not sure who owns the trains and who owns the tracks, so I am thinking about the rails, the tunnels, the stairs, the lifts, access and all that sort of stuff

Rolling stock is a bit old, they need to modernise the whole system, the electrics and signalling. They have suffered from lack of investment over too many years

An old system that needs maintenance, trains and station redevelopment and line closures, flooding in tunnels. It has no capacity to deal with things going wrong

London Underground Section:

Investment

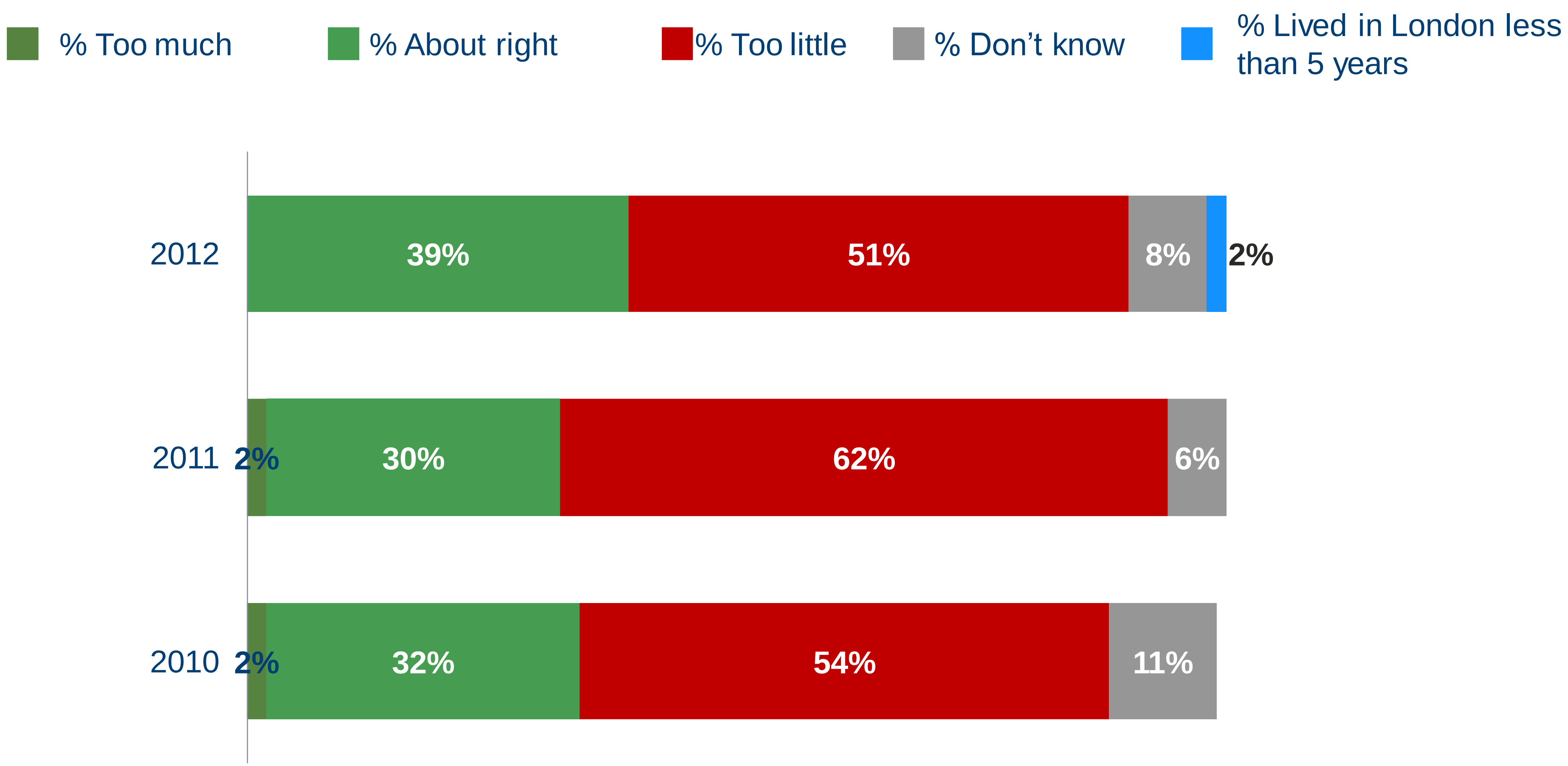
LU – Investment over the past five years

- On balance Business Leaders are a more likely to feel that the level of investment in LU over the last five years has been too little (one in two) rather than about right (one in three). None think too much has been spent

- However, there are signs that they are less likely (though not significantly) to say that the level of investment has been too little, and there has been a corresponding increase in the proportion who believe the investment level has been about right

Investment over the past five years

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



Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

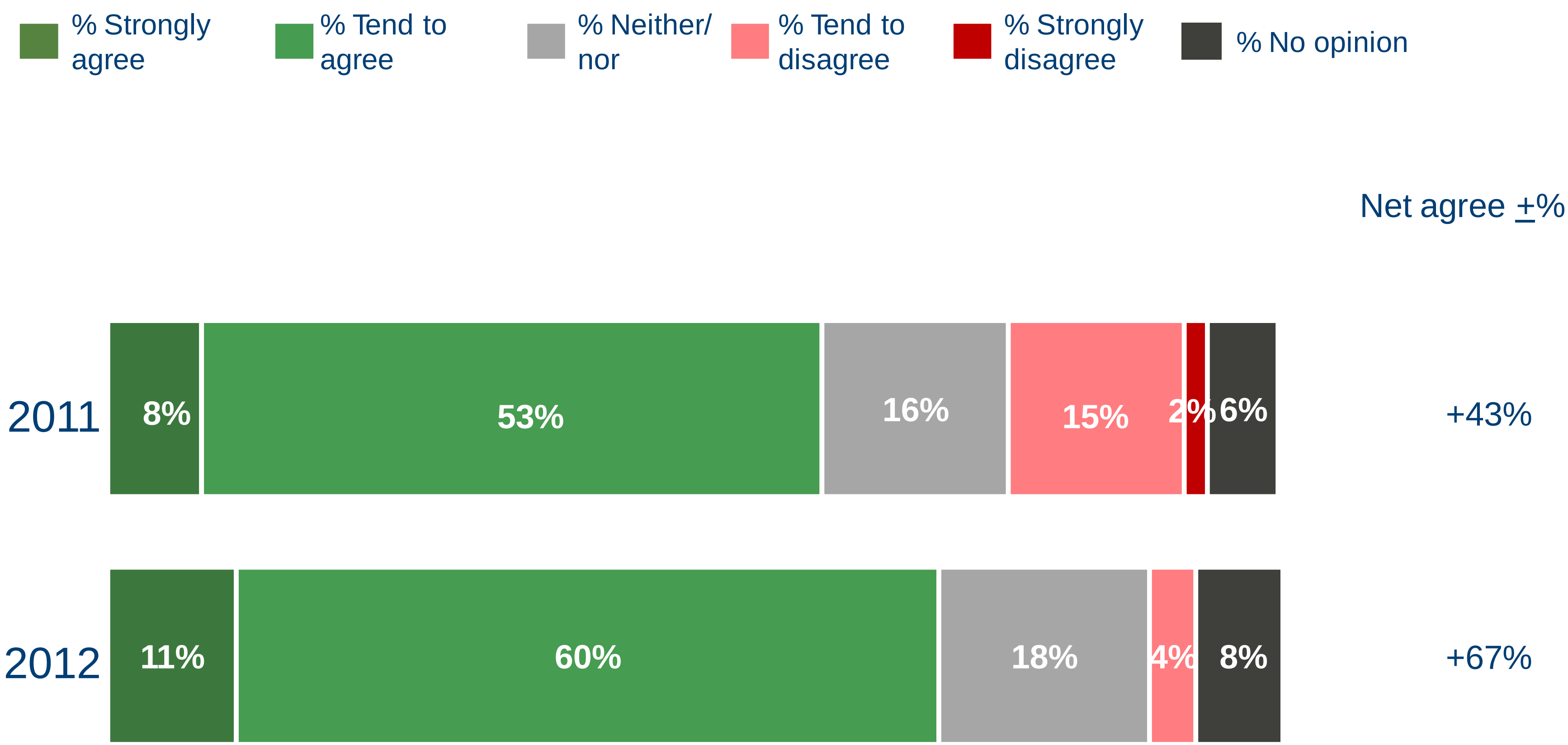
LU – Delivering real travel improvements through investment

- Encouragingly seven in of ten agree that LU is delivering real travel improvements through its investment

- Furthermore, the proportion disagreeing that improvements have been made has dropped significantly to just four percent

Delivering travel improvements through investment

- To what extent do you agree or disagree that London Underground is delivering real travel improvements through investment?



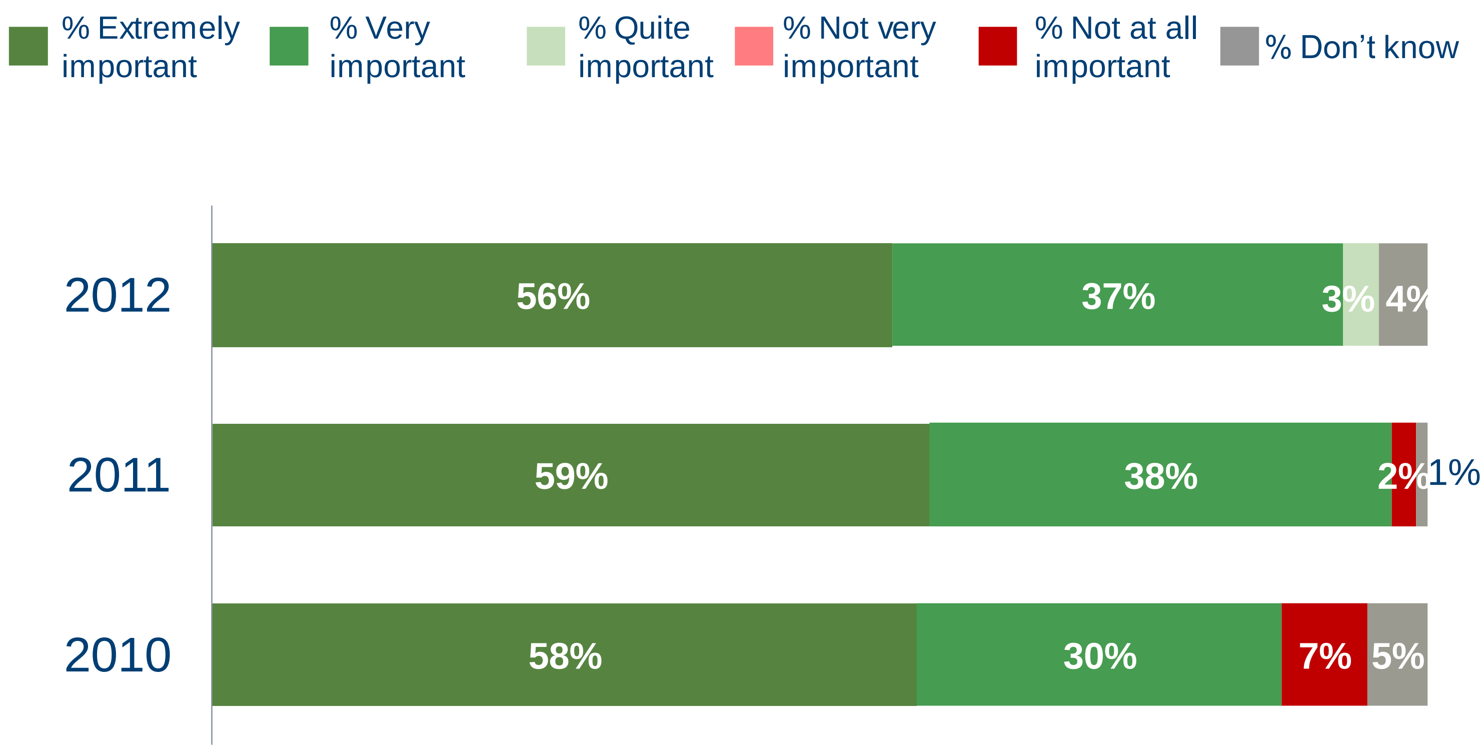
Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

LU – Importance of maintaining investment

- In line with previous years (where the question wording differed slightly), the vast majority (96%) think it is extremely or very important to maintain the planned level of investment in London's transport infrastructure

Importance of maintaining investment

- How important is it to London's future to maintain the planned level of investment in London's transport infrastructure (such as in services like London Underground)?*



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

Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

LU – Importance of investment to London's ongoing economic recovery

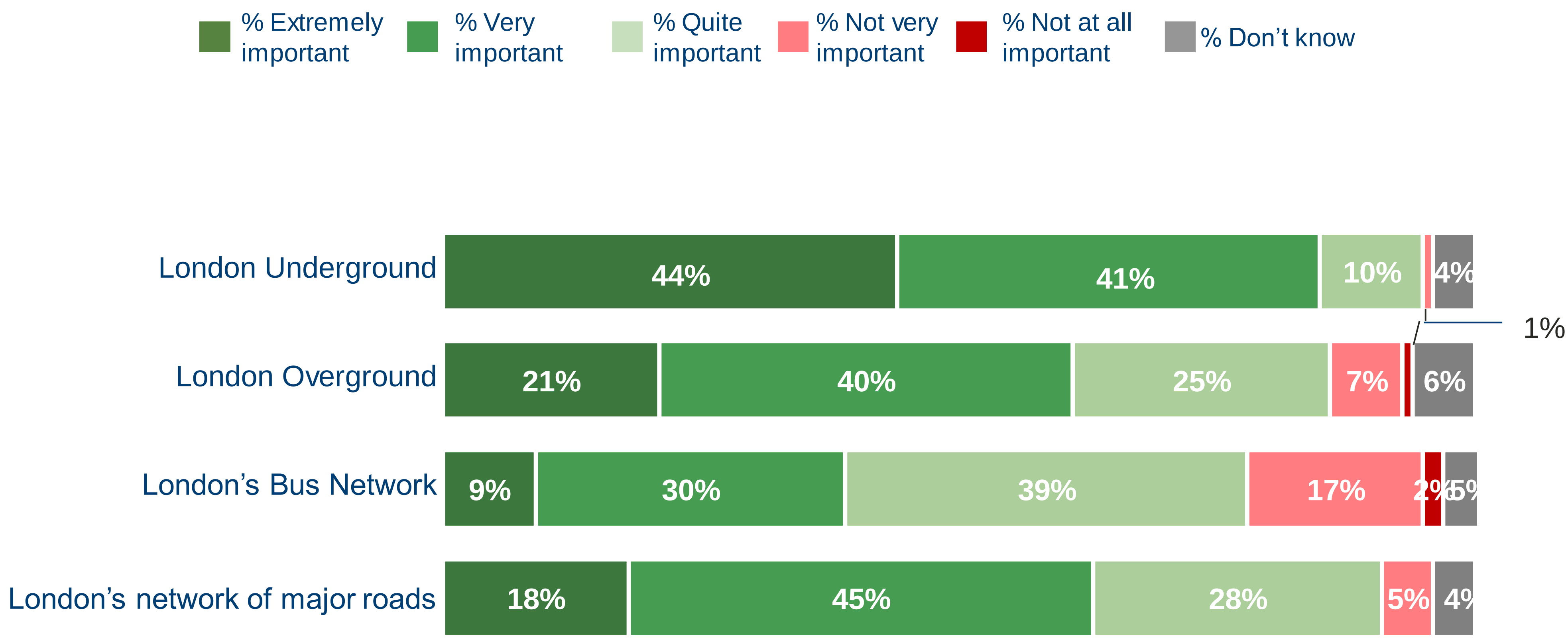
- Continuing to improve LU, LO, the bus and road networks is considered important to London's on-going economic recovery to varying degrees. However, LU is clearly judged to be the most important (85% extremely/very important), followed by the road network in (63%) and LO (61%)

- However, comparatively few (39%) see improving the bus network as extremely or very important to London's economic recovery. Indeed, unlike the other three modes of transport some Business Leaders actively see improvements in this area to be unimportant. However, it is likely that this view is held mainly by those based outside London. 90% based in London see this as important, compared to 68% of those based elsewhere.

Importance of improving transport services to London's ongoing economic recovery

Transport for London

- Thinking specifically of the current economic conditions, how important do you think that continuing to improve the following transport services will be to London's on-going economic recovery?



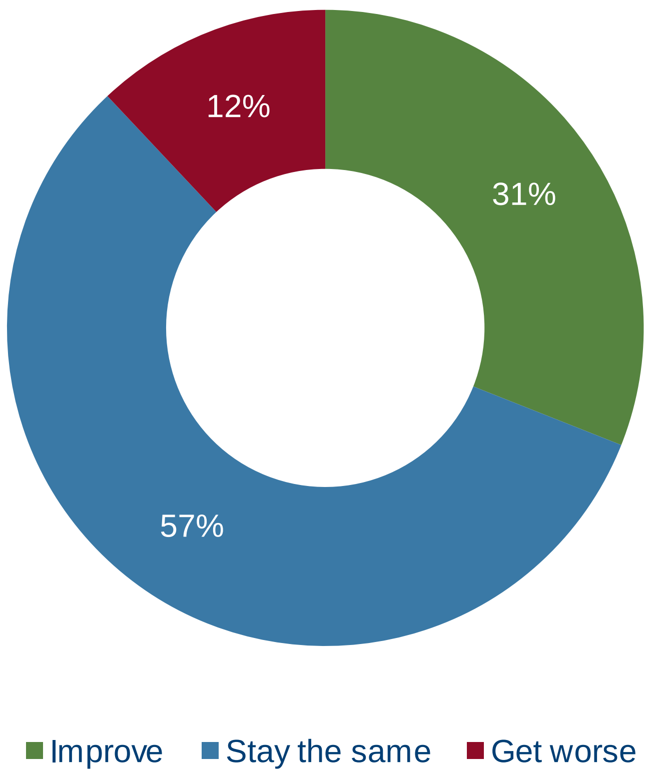
Base: Business Leaders (102), All who have heard of London Underground, interviewed Sep-Dec 2012

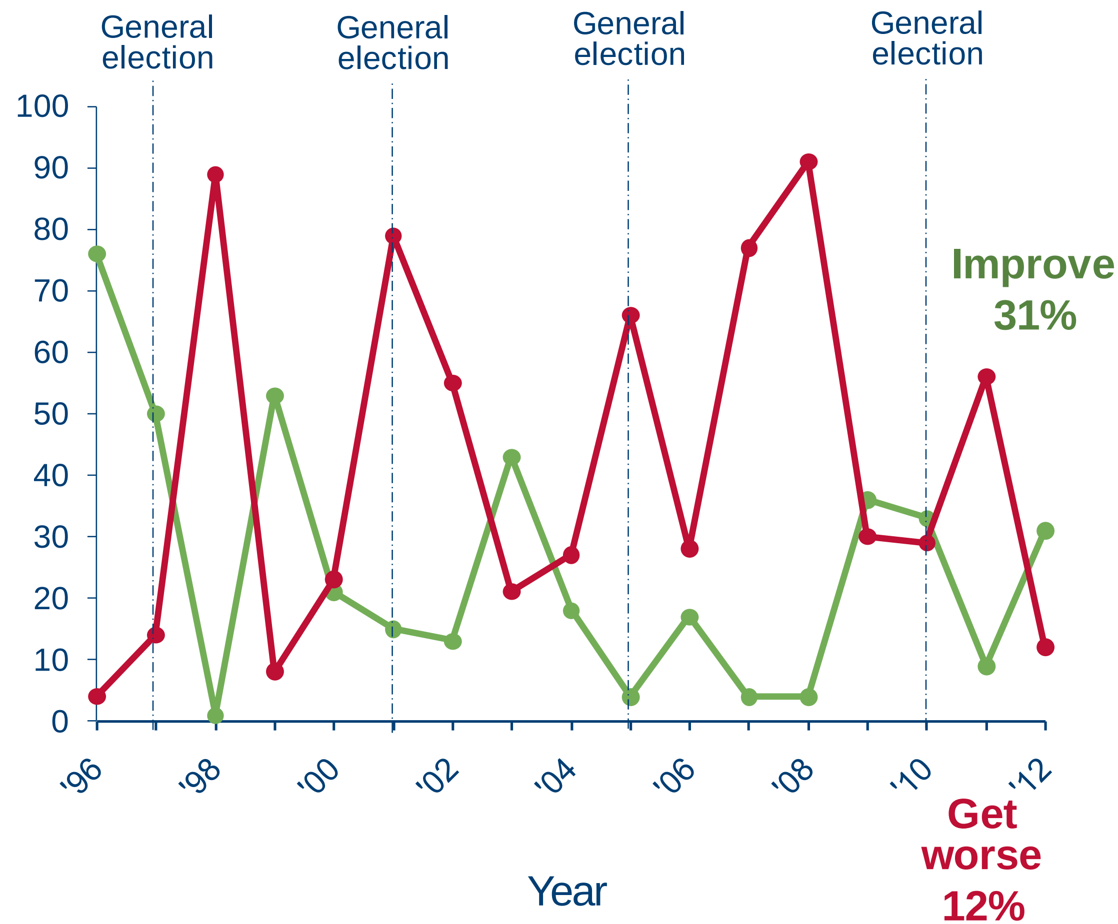
Appendices

Background findings:
The economy and Politics

Only 12% think the economic condition of the country will get worse compared to 56% last year

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

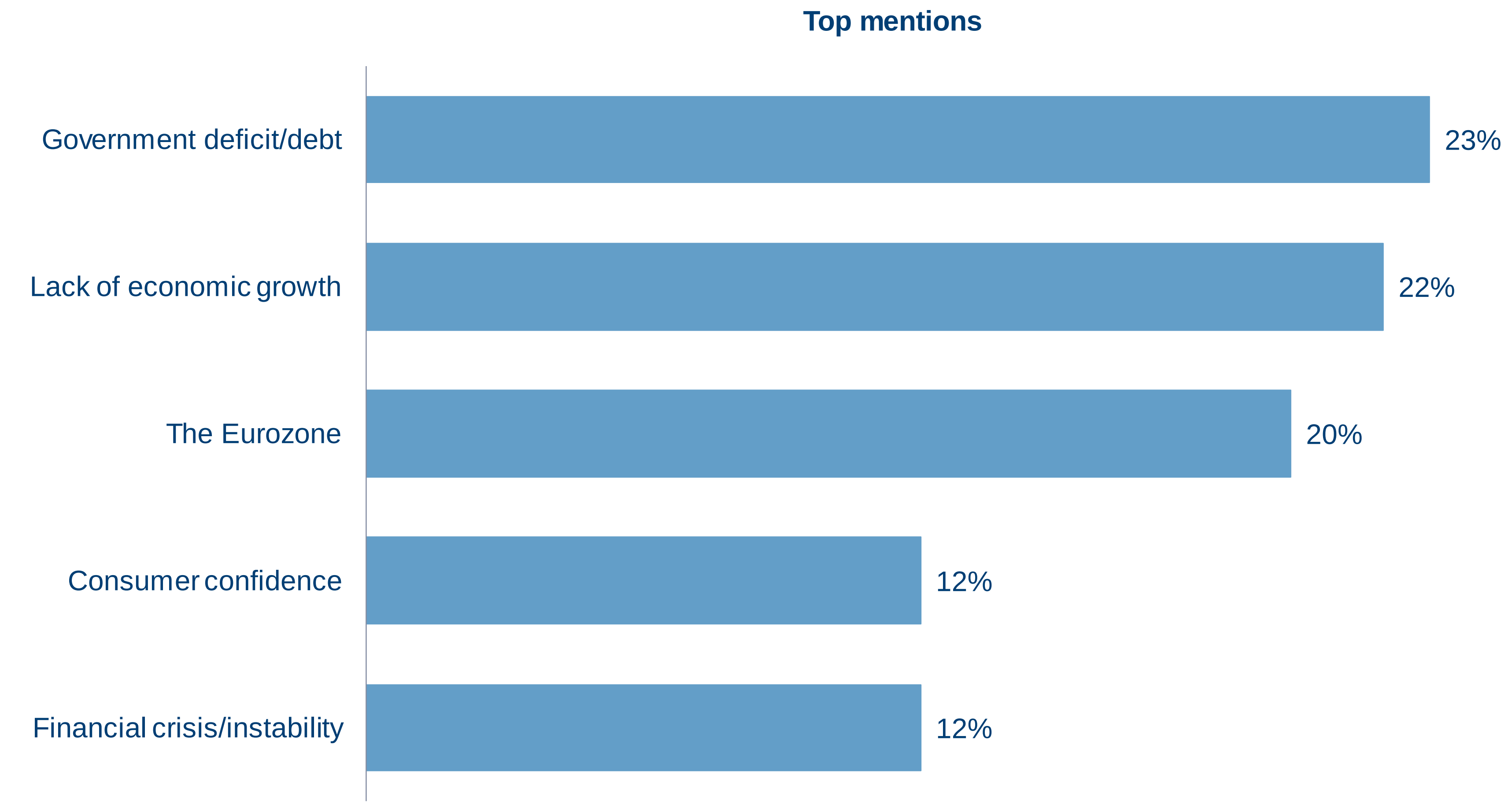




Base: Business Leaders (103) interviewed Sept-Dec 2012

Nearly a quarter see the government deficit as the most important issue facing Britain today

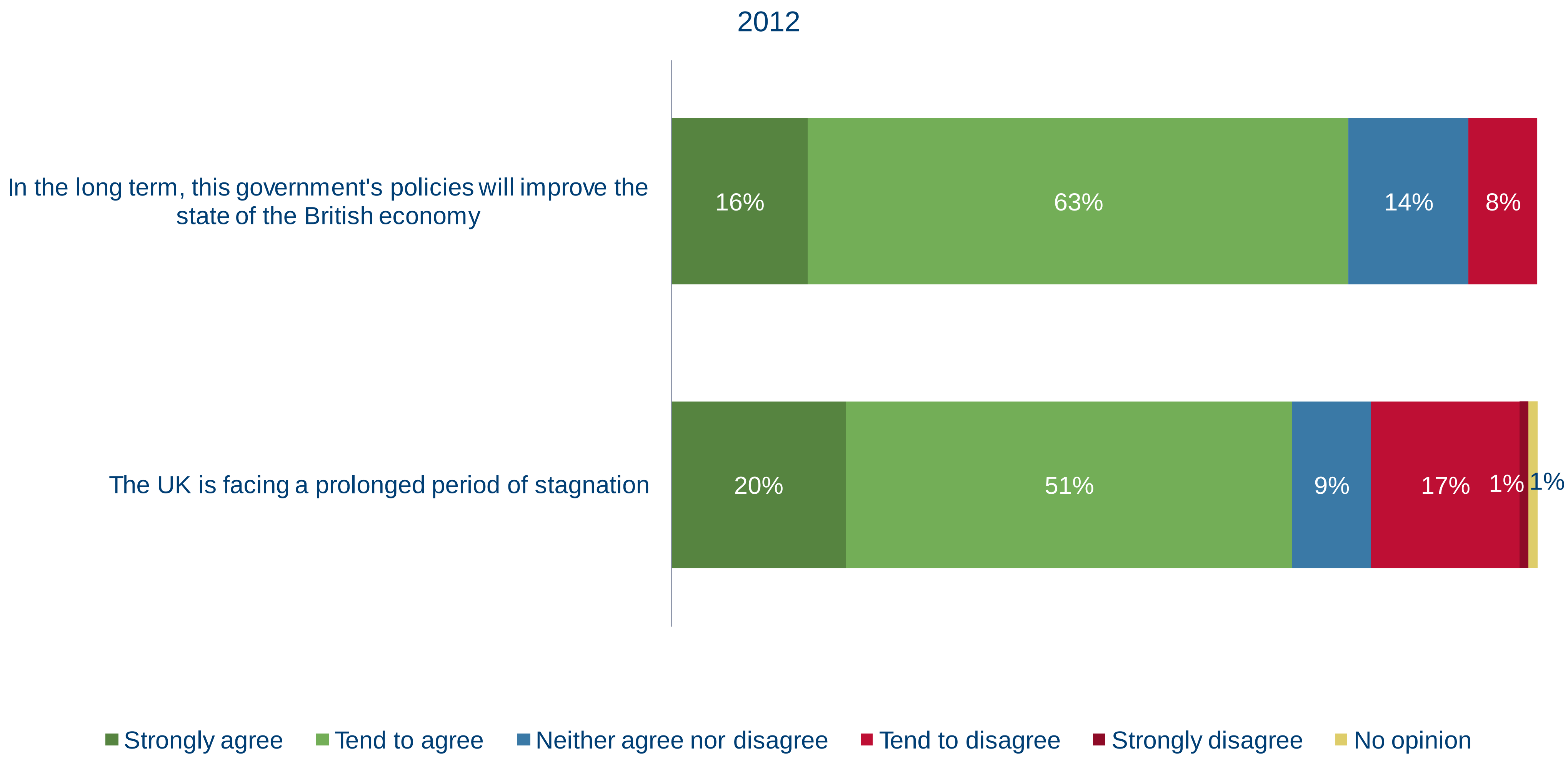
- What do you see as the most important issues facing Britain today?



Base: Business Leaders (103) interviewed Sept-Dec 2012

A clear majority agree that this Government's policies will improve the state of the British economy

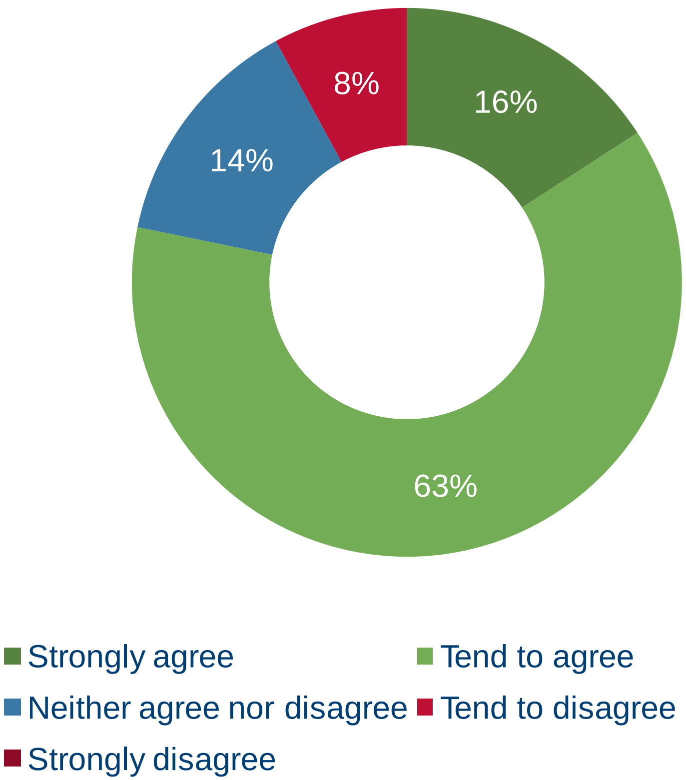
- To what extent do you agree with the following statements?

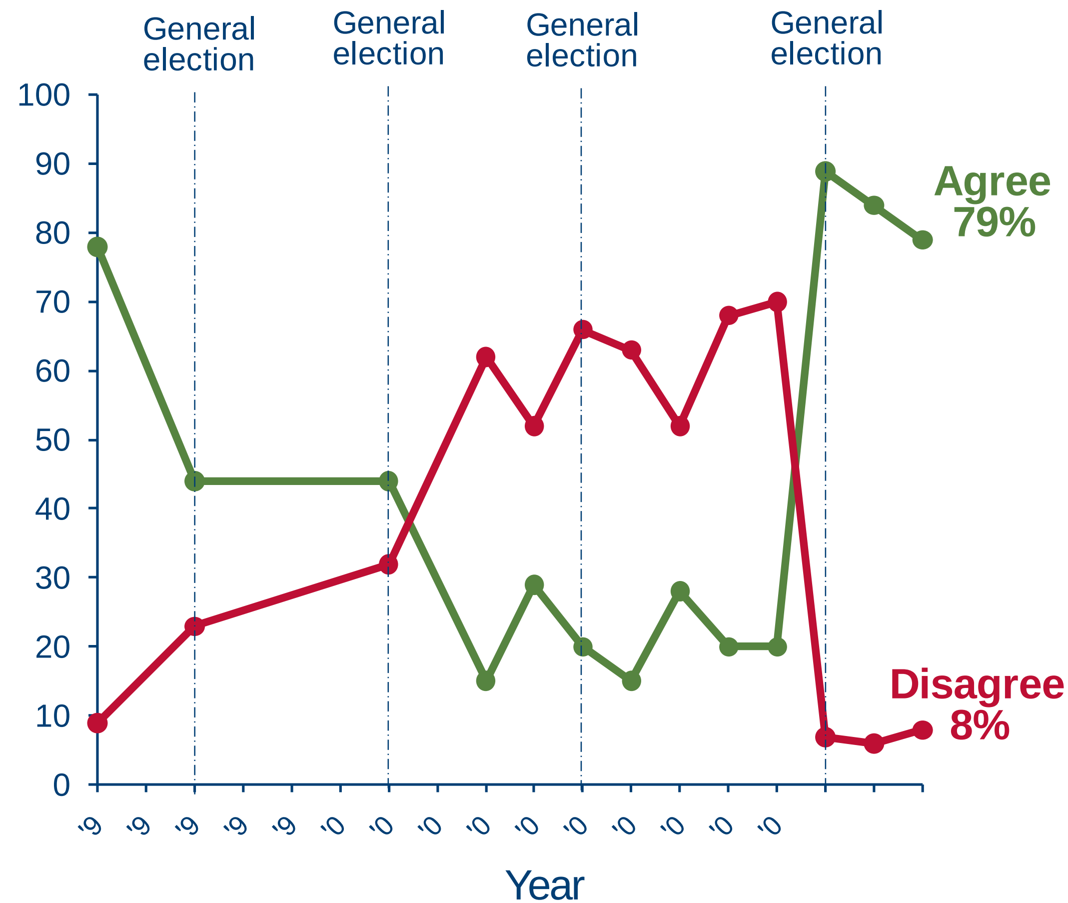


Base: Business Leaders (103) interviewed Sept-Dec 2012

Trend data - In the long term, this Government's policies will improve the state of the British economy

- To what extent do you agree with the following statements? In the long term, this government's policies will improve the state of the British economy





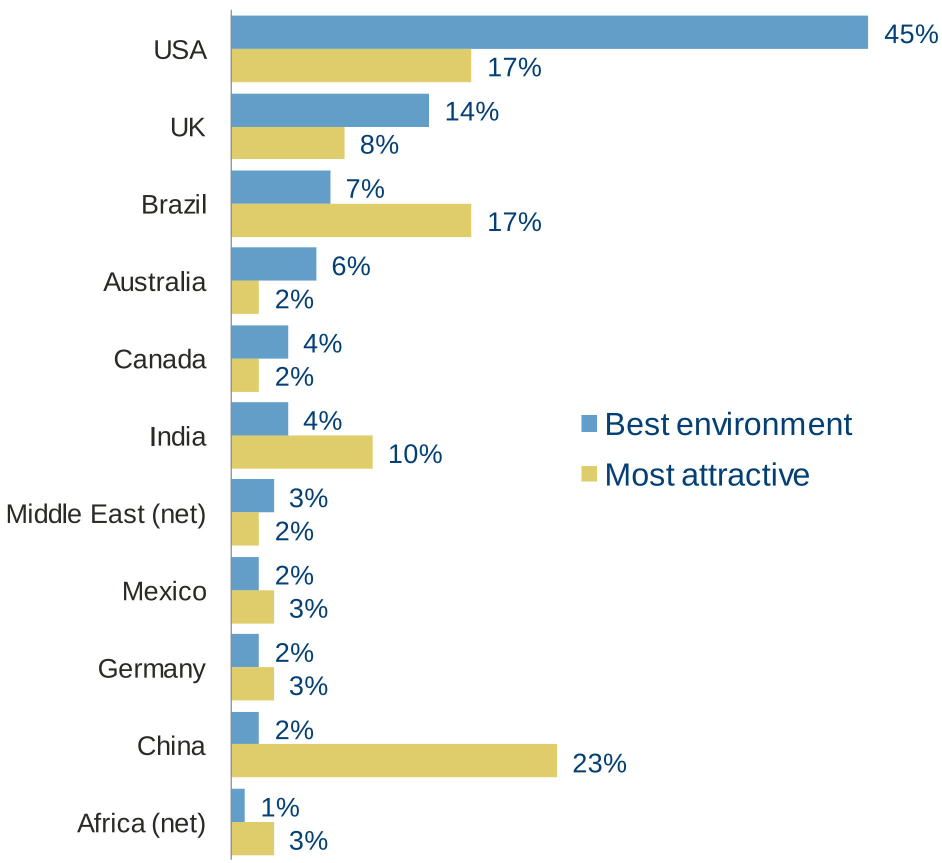
Base: Business Leaders (103) interviewed Sept-Dec 2012

The USA is seen to have the best environment for business with China perceived as the most attractive for investment

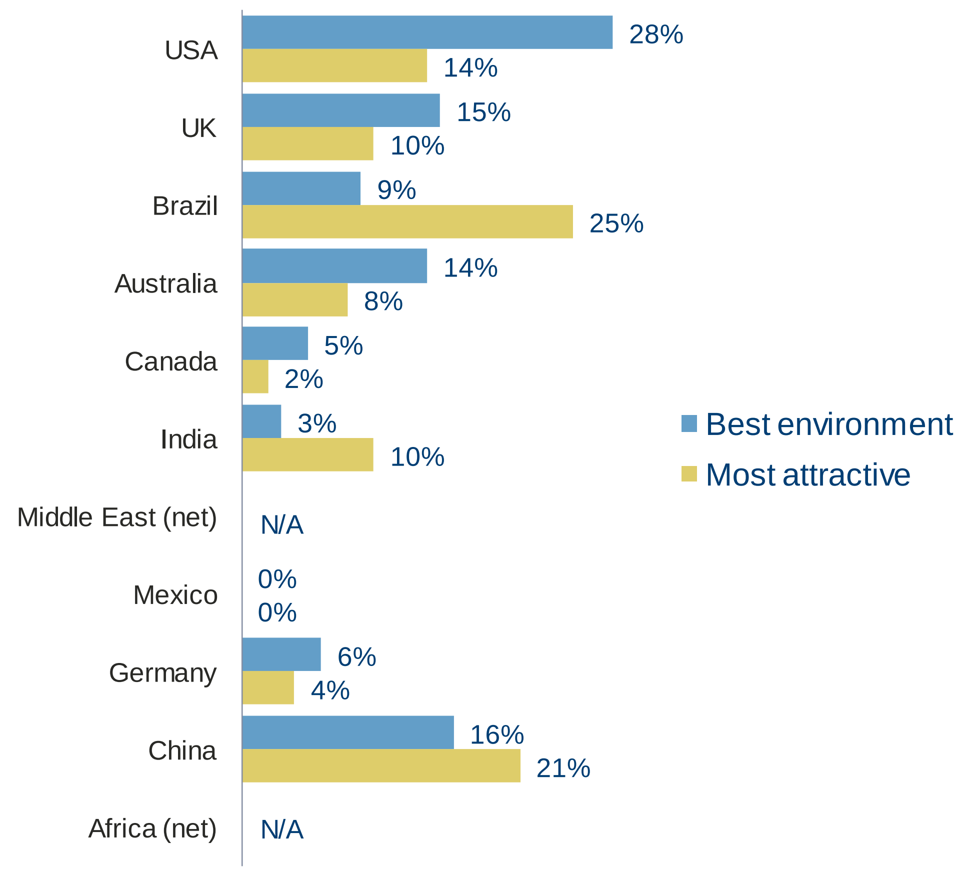
- In the current climate, which of the following countries do you believe offers the best environment for business?
- Which of the following countries do you believe are the most attractive for investment?

Top mentions

2012



2011



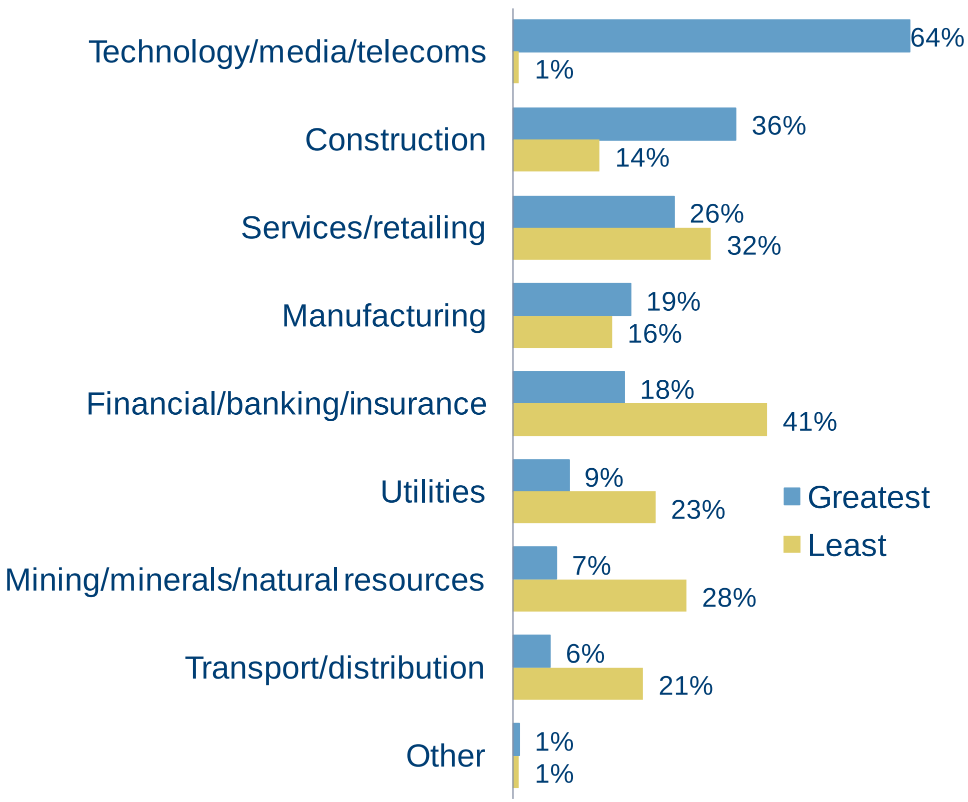
Base: Business Leaders (103) interviewed Sept-Dec 2012

Base: Business Leaders (100), interviewed Sep-Dec 2011

The technology sector is seen as having the greatest potential for growth with the financial sector having the least

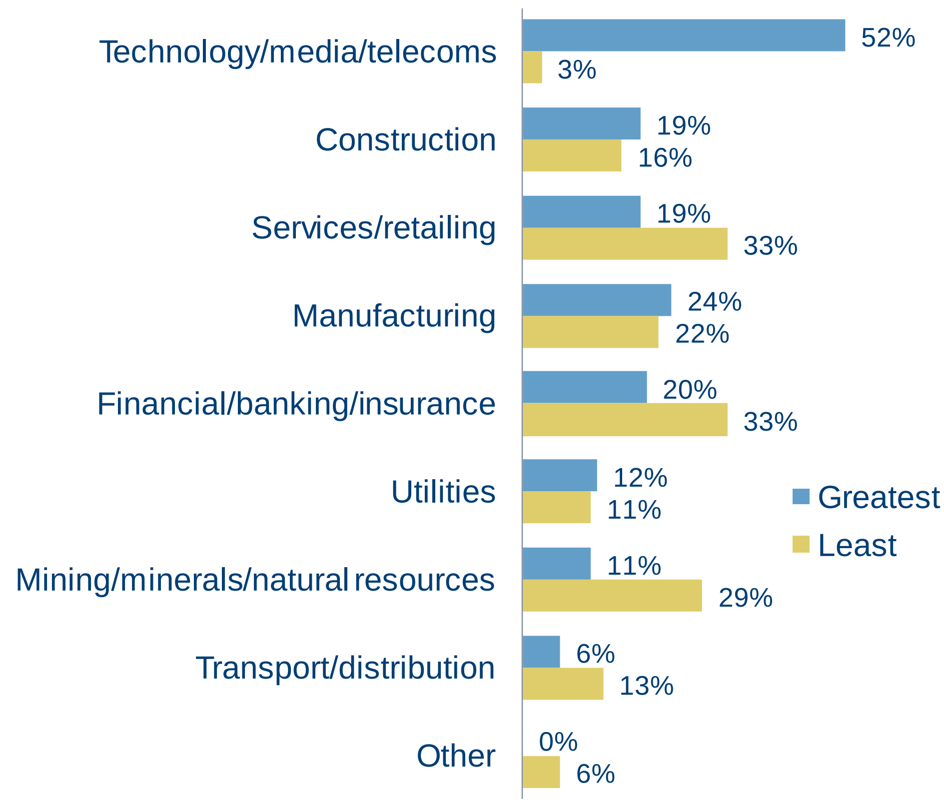
- In which one or two of the following sectors do you see the greatest potential for growth in the UK over the next 12 months?
- In which one or two of the following sectors do you see the least potential for growth in the UK over the next 12 months?

2012



Base: Business Leaders (103) interviewed Sept-Dec 2012

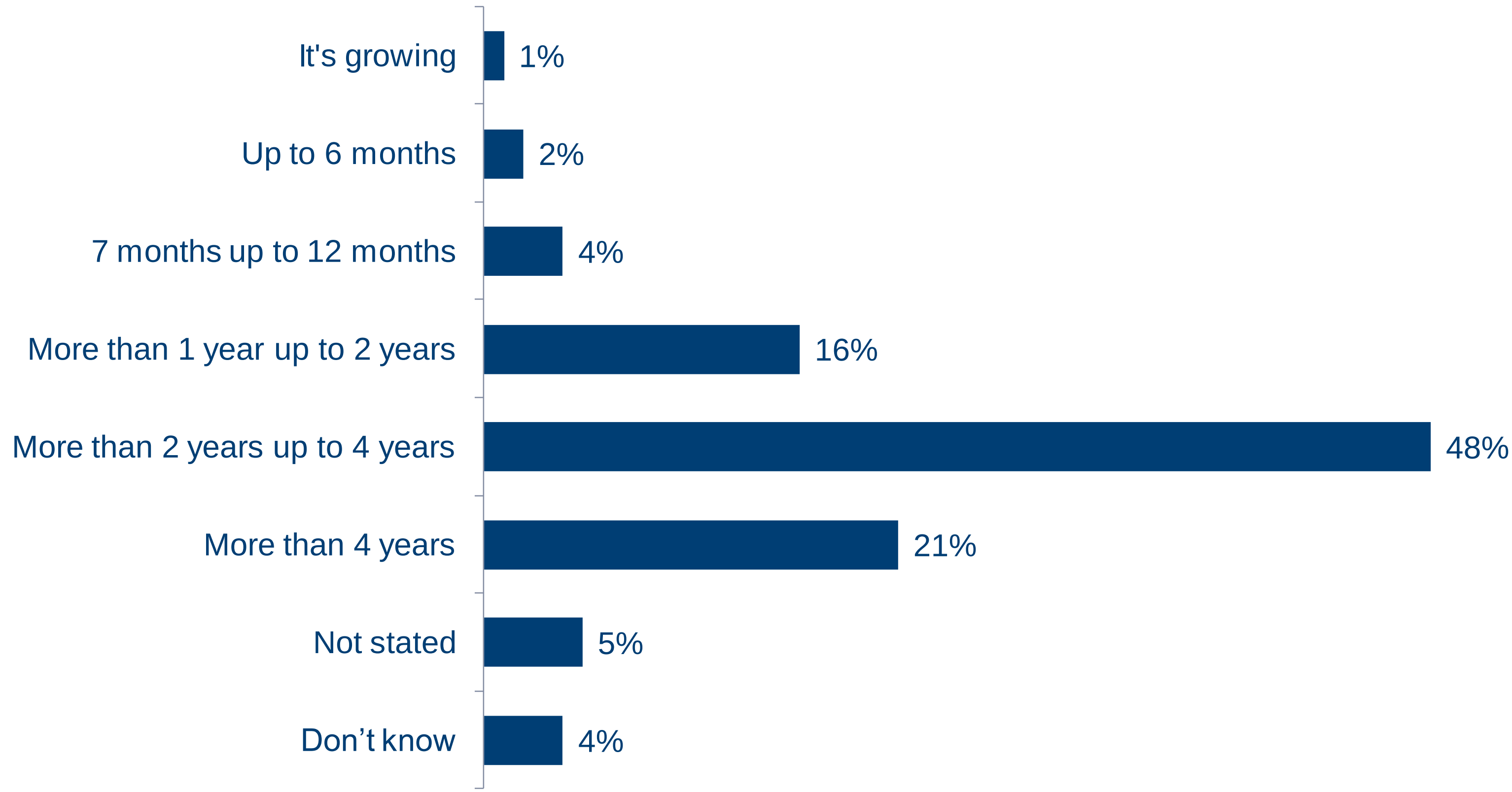
2011



Base: Business Leaders (100), interviewed Sep-Dec 2011

Two-thirds estimate it will be two years or more before the UK economy grows significantly

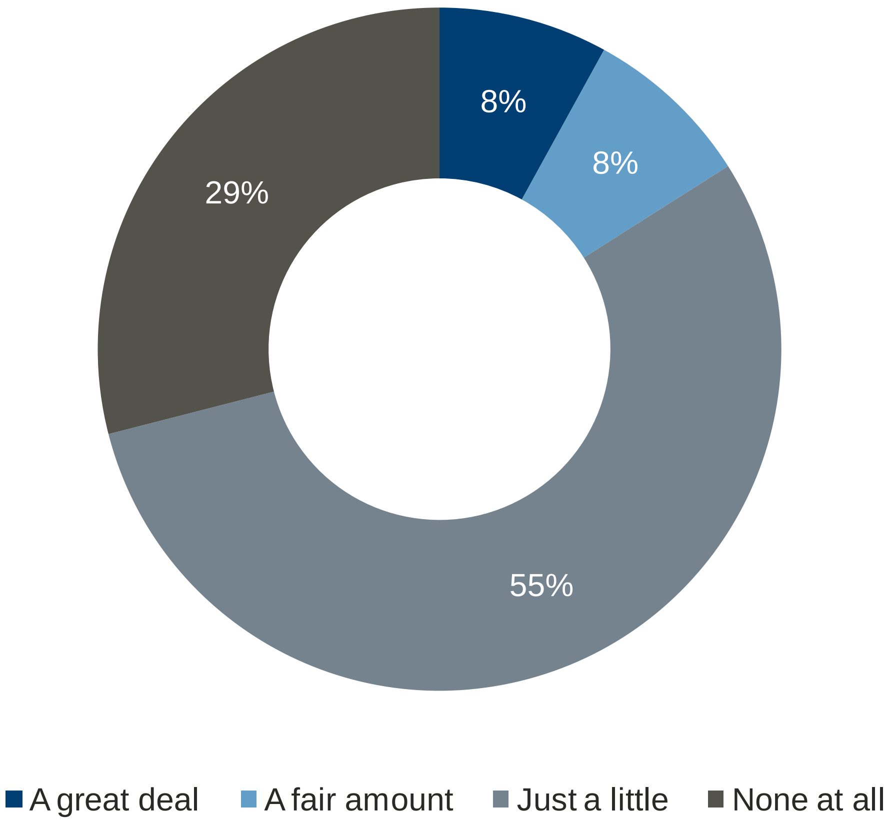
- What is your best estimate of when the UK economy will begin to grow in a significant way again?



Base: Business Leaders (103) interviewed Sept-Dec 2012

Only a minority think that cuts will have much impact on their business

- How much of an impact will public sector cuts have on your business over the next 12 months?

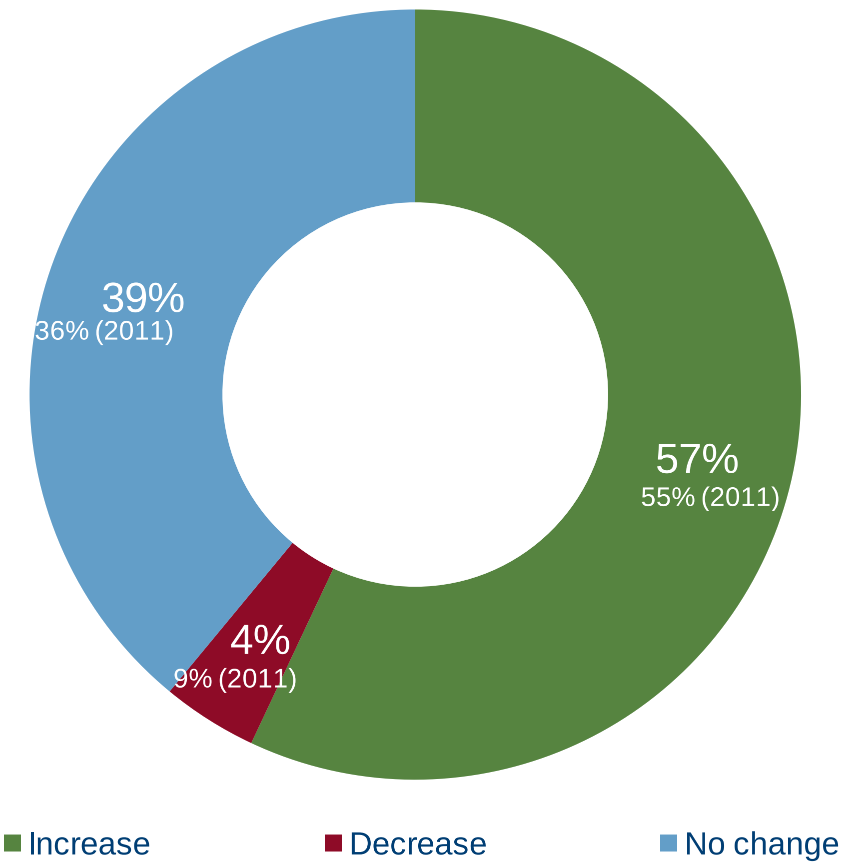


Base: Business Leaders (103), interviewed Sep-Dec 2012

Background findings:
Regulation

More than half think that the level of regulation has been increasing (little change to 2011)

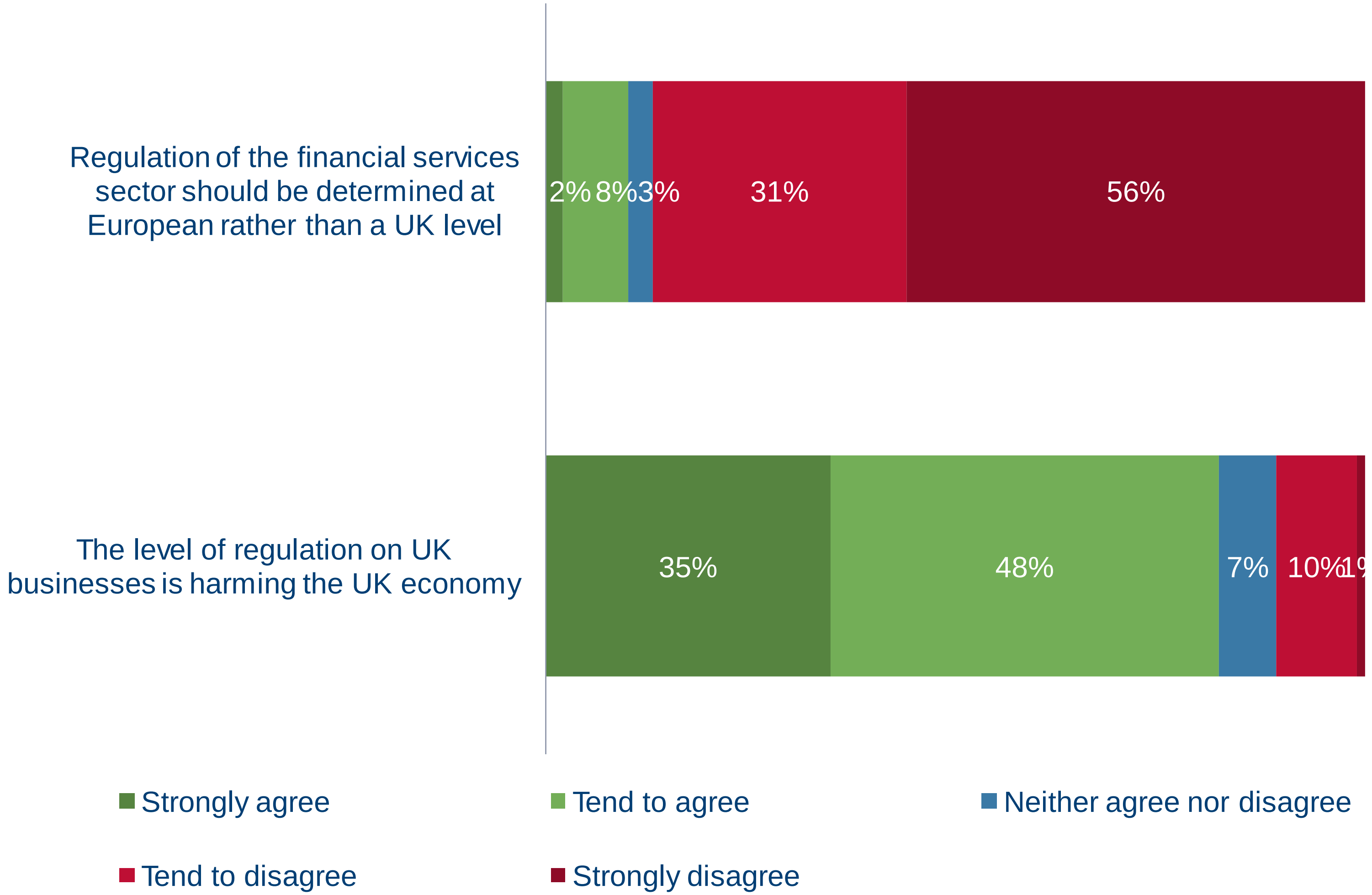
- Do you feel that the level of regulation affecting business in the UK overall has been increasing or decreasing over the last 12 months or has there been no change?



Base: Business Leaders (103), interviewed Sep-Dec 2012, (100) interviewed Sept-Dec 2011

Over half (56%) strongly disagree that regulation of financial services should be determined in Europe

- To what extent do you agree or disagree with each of the following statements?



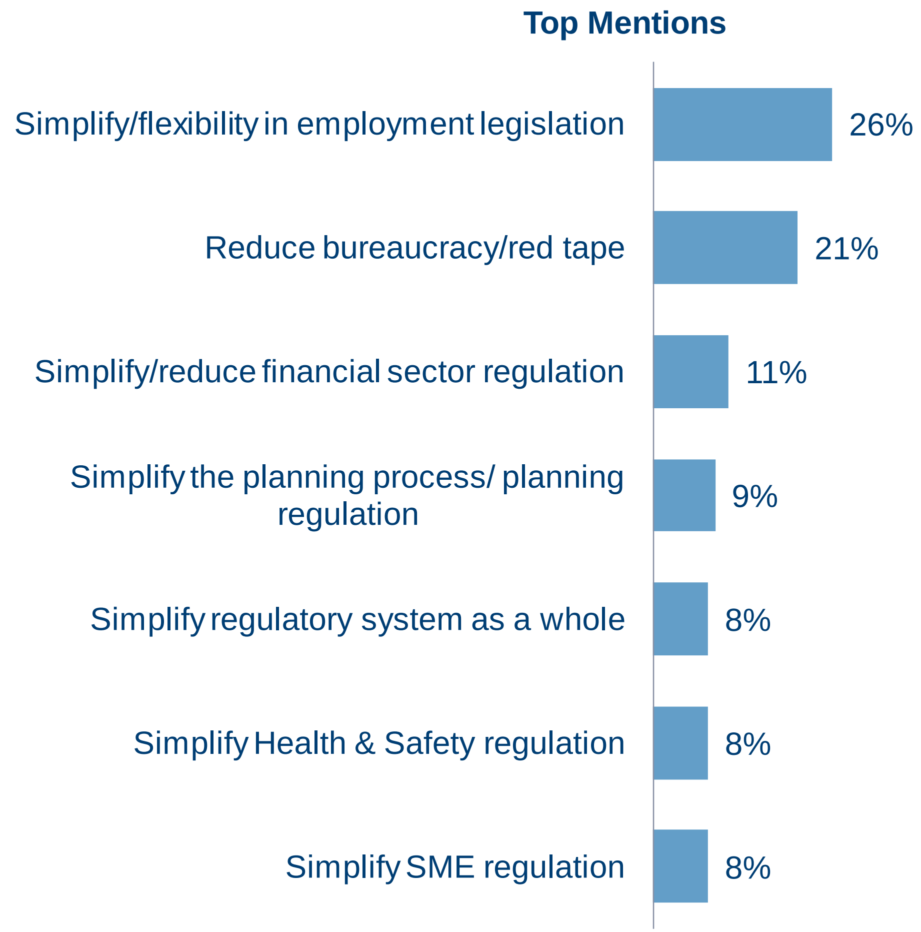
Net percentage points:
2012 +72pp
2011 +85pp
2010 +82pp

Net = % Agree - % Disagree

Base: Business Leaders (103) interviewed Sep-Dec 2012, (100) interviewed Sept-Dec 2011, (102) interviewed Sept-Dec 2010

Simplifying employment legislation and bureaucracy/red tape are the key areas Business Leaders would like to see a reduction in regulation

- How, specifically, would you like to see the level of regulation on UK businesses reduced in the UK?



Base: Business Leaders (85), All who agreed that regulation on UK businesses is harming the economy, interviewed Sep-Dec 2012

Background findings:
Use of digital media

8 in 10 Business Leaders use Apple products in a corporate capacity (rising from 66% in 2011). Also, tablet usage increases

- Which of the following do you do or use in a <u>corporate</u> capacity?

	2012	2011
An Apple product	83%	(66%)
Tablet computer	80%	(52%)
Smartphone	77%	(70%)
LinkedIn	40%	(36%)
Twitter	21%	(18%)
Blogs	22%	(21%)
Facebook	17%	(16%)
None	5%	(8%)

Base: Business Leaders (103) interviewed Sept-Dec 2012, (100) interviewed Sept-Dec 2011

9 in 10 Business Leaders use Apple products in a personal capacity too

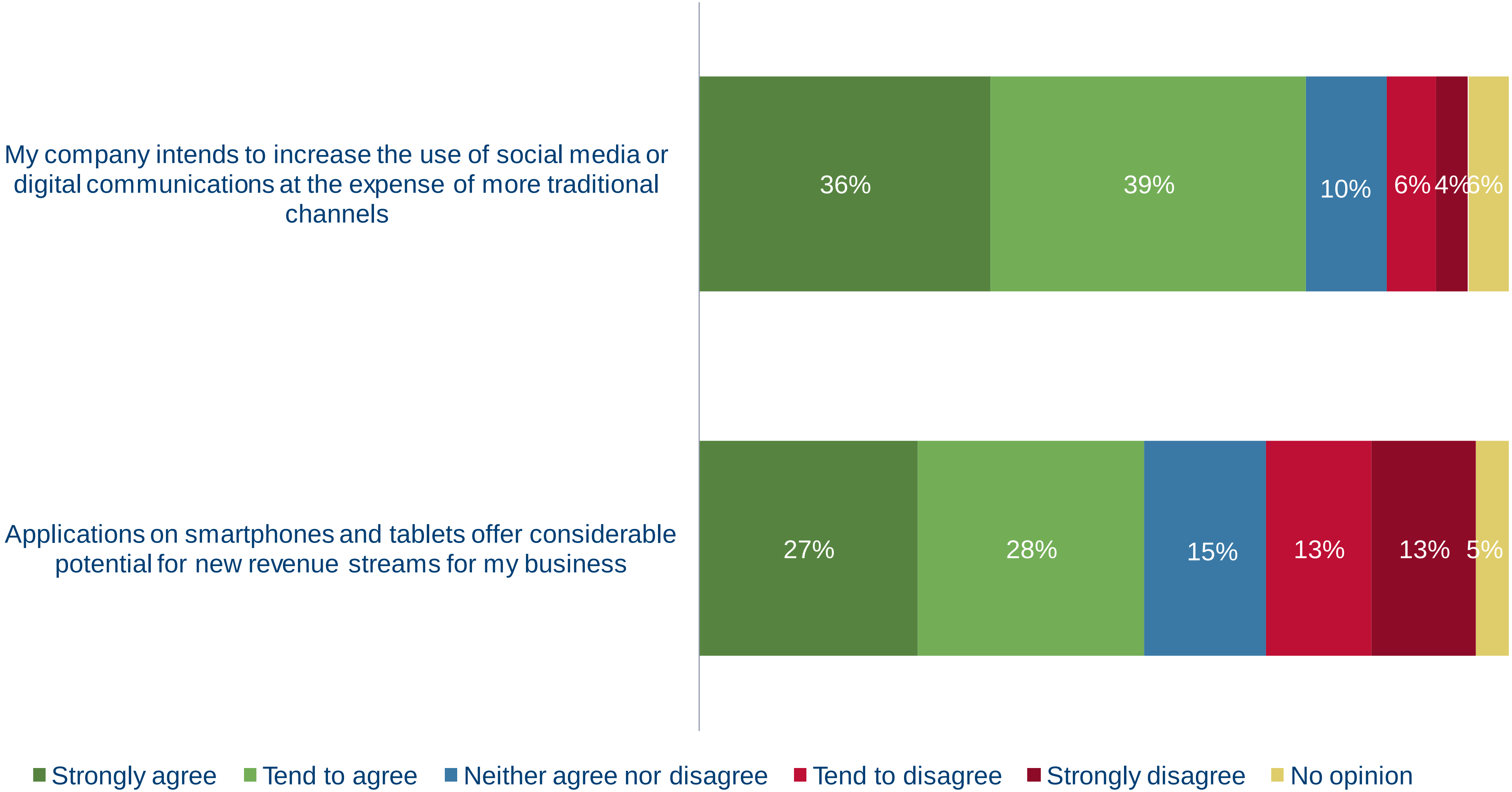
• Which of the following do you do or use in a personal capacity?

	2012	2011
An Apple product	89%	(82%)
Tablet computer	79%	(64%)
Smartphone	74%	(75%)
LinkedIn	33%	(28%)
Facebook	20%	(10%)
Twitter	10%	(6%)
Blogs	8%	(4%)
None	4%	(7%)

Base: Business Leaders (103) interviewed Sept-Dec 2012, (100) interviewed Sept-Dec 2011

Three-quarters agree that their company intends to increase use of social media or digital communications

- To what extent do you agree or disagree with each of the following statements?



Base: Business Leaders (103) interviewed Sept-Dec 2012

Participating organisations

Participating organisations 1

Name	Company	Name	Company
Julia Wilson	3i Group PLC	Stephen Catlin	Catlin Group Ltd
Andy Laing	Aberdeen Asset Management PLC	Sacha Zackariya	Change Group International PLC
Nicholas Jefferies	Acal PLC	David Marock	Charles Taylor PLC
Alastair Lyons	Admiral Group PLC	Peter Hickson	Chemring Group PLC
Greg Hawkins	African Barrick Gold PLC	Andy Blundell	Communisis PLC
Adam Jones	All3Media Finance Ltd.	Jonathan Glenn	Consort Medical PLC
Warren East	ARM Holdings PLC	William Rucker	Crest Nicholson PLC
Richard Longdon	AVEVA Group	Colin Child	De La Rue
Trevor Matthews	Aviva	Roger Siddel	Findel
Dick Olver	BAE Systems PLC	Andrew Cunningham	Grainger PLC
Tom Keevil	Barratt Developments PLC	Gordon Banham	Hargreaves Services PLC
Anthony Pidgley	Berkeley Group Holdings PLC	Paul Venables	Hays PLC
Simon Sherrard	Bibby Line Group Ltd	David Radcliffe	Hogg Robinson Group PLC
Mark Aylwin	Booker Group PLC	Iain Mackay	HSBC Holdings
David Ritchie	Bovis Homes Group	Charles Gregson	ICAP PLC
Stephen Smith	British Land Company PLC	Andrew Sukawaty	Inmarsat Group PLC
David Fischel	Capital Shopping Centres Group	Christopher Rodrigues CBE	International Personal Finance PLC
Lord Inglewood	Carr's Milling Industries PLC	Mark Braund	Interquest Group PLC

Participating organisations 2

Name	Company	Name	Company
Adrian Ringrose	Interserve PLC	Nigel Cooper	Motivcom PLC
Ian Griffiths	ITV PLC	Helen Mahy	National Grid PLC
Mike Coupe	J Sainsbury PLC	Sandra Kelly	National House Building Council
Edward Bonham- Carter	Jupiter Fund Management PLC	Geoffrey Howe	Nationwide Building Society Ltd
Bill Halbert	KCOM Group	Gerry Skelton	Nats Ltd
Paul Sheffield	Kier Group PLC	John Barton	Next PLC
Nigel Keen	Laird PLC	Christopher Cracknell	OCS Group Ltd
Richard Akers	Land Securities Group PLC	Patrick O'Sullivan	Old Mutual PLC
Sir Win Bischoff	Lloyds Banking Group PLC	Charles Holroyd	Oxford Instruments
Geoffrey White	Lonrho PLC	Christopher Houghton	Park Group PLC
James Hewitt	M&C Saatchi PLC	Colin Drummond	Pennon Group PLC
Peter Atkinson	Macfarlane Group	Robert Rubin	Pentland Group PLC
Jon Aisbitt	Man Group PLC	Charles Miller-Smith	Premier Foods PLC
Nick Stagg	Management Consulting Group PLC	Neil Johnson	Promethean World PLC
Peter Box	Marsh Ltd	Mark Garrett	Ricardo
Bob Holt	Mears Group	Sir Simon Robertson	Rolls-Royce Group PLC
Michael Adams	Monarch Airlines Ltd	Christopher Merry	RSM Tenon Group PLC
Martin Beesley	Morrison Utility Services Ltd	Robert Bond	Rydon Group Ltd

Participating organisations 3

Name	Company	Name	Company
Peter Smith	Savills PLC	Huw Davies	Wates Group Ltd
Nigel Rich CBE	Segro PLC	Keith Cochrane	Weir Group
Jeremy Stafford	Serco	Allan Cook CBE	WS Atkins PLC
Michael McKeon	Severn Trent PLC	David Bauernfeind	Xchanging PLC
Steve Corcoran	Speedy Hire	Steve Barber	Xyratex Ltd
Bill Whiteley	Spirax-Sarco Engineering PLC	Adrian Whitfield	Yule Catto & Co
Eric Hutchinson	Spirent Communications PLC		
Michael Tye	Spirit Pub Company PLC		
Gregor Alexander	SSE PLC		
Jonathan Davies	SSP Group Ltd		
Patrick Martell	St Ives		
Andrew Croft	St. James's Place PLC		
Keith Skeoch	Standard Life PLC		
Julian Dunkerton	Supergroup PLC		
Michael Tobin	Telecity Group PLC		
Robert Walker	Travis Perkins PLC		
Gil Baldwin	Tunstall Healthcare Group Ltd		
Mike McTighe	Volex Group		

Please note that 6 respondents wished to remain anonymous.

Composition of the sample

Industry Sector	2012
Services/ Retailing	29%
Financial/ Banking	22%
Technology/ Media/ Telecoms	18%
Manufacturing	8%
Transport/ Distribution	7%
Construction	6%
Utilities	5%
Mining/ Minerals/ Natural Resources	4%
Property/Real Estate	1%

FTSE Index	2012
FTSE 100	21%
FTSE 250	35%
Other listed and Private	44%

Job Title	2012
Chairman	27%
Chief Executive	40%
Finance Director/ CFO	18%
Managing Director	4%
Other	11%

Employees	2012
Below 500	21%
500-4,999	50%
5000-24,999	15%
25,000 +	13%

Head Office Location	2012
London	48%
Outside London	52%

Base: Business Leaders 2012 (103), interviewed Sep-Dec 2012.