

RESEARCH SUMMARY

Title	Business Leaders reputation survey 2012		
Objective	To establish the nature of the reputation of TfL, LU and LB		
Date	April 2013	Agency:	Ipsos MORI
Methodology	Interviews with 103 UK-based executive board-level directors		

Abstract

There were considerable improvements in perceptions of TfL, LU and LB among Business Leaders in late 2012 compared to 2011. Ratings of LU's overall level of service have significantly improved, with top ratings rising to 75% from 47% in 2011. Nearly all Business Leaders (93%) say that it is extremely or very important to maintain the planned level of investment in London's transport infrastructure (such as LU).

Key findings

It should be noted that this survey was carried out shortly after the Olympic Games took place in London.

- **Favourability and advocacy towards TfL, LU and LB have improved considerably**
 - TfL's net favourability rose 45 points from 4 to 49%. LU rose 44 points to 70% (a huge improvement on 2010 when the score was 4) and Buses were up 24 from 15% to 39%. LO (first year of survey) scored +30% on net favourability.
 - TfL's net advocacy rose 33 points from -11 to +22 while LU rose by 41 points to +43 (again a huge improvement on 2010 when the score was -17). Buses net advocacy was up 20 from +4 to +24. LO (first year of survey) scored +20 on net advocacy.
- **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 CO2 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 of 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
- **72% say LU and 45% say TfL are 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

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)

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