Enterprise segmentation & development

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April 2009
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Research conducted by 2CV
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Background, objectives, methodology and sample
Summary of approach and method

- The overall business objective for this study is to **increase Enterprise pledge signings for the ‘A New Way to Work’ scheme and to maintain high retention rates**. The results of the research will be used to inform Enterprise activity for the coming year.

- The research program undertook an iterative three phased approach:

  - **Stage 1**
    - Qualitative
    - Exploring Language
    - N=8 in-depth interviews, in-situ with key decision makers in business

  - **Stage 2**
    - Quantitative
    - Developing a Segmentation, Measuring Appeal and Identifying Targets
    - N=212 online survey interviews with key decision makers in business

  - **Stage 3**
    - Qualitative
    - Exploring Segmentation and Opportunities
    - n=18 in-depth interviews with key business decision makers

- Research was conducted between January – March 2009. The project team was Jane Goldthorpe, Kat Jennings, Lee-Ann Rowan, Richard Pickering, Felicity Carlin, Hannah Beech and Tim Blandford
Background

- ‘A New Way to Work’ is the umbrella name for the initiatives developed and managed by the Workplace Travel Planning Team. This research project specifically concerns the work of the Enterprise support package that focuses on small-medium organizations (SMEs) with between 20-250 employees. Launched in May 2007 Enterprise provides tailored advice to SMEs on how to **improve workplace travel and practices to promote more sustainable travel**.

- Signing up to the package means that organisations receive **professional support** throughout the travel planning process, are envisaged to become part of a support network, which will continue to **grow in it’s offerings in future** (potentially such as regular networking, events, awards, competitions) and receive **targeted support** to further encourage modal change.

- To date the Enterprise initiative is **performing successfully** and has signed up 100+ companies to the A New Way to Work plan. However, as the Enterprise plan enters its third year of activity, there is a need to **re-examine and validate the segmentation and strategy for the plan** in order to drive growth and success of the initiatives in 2009 and beyond.
Business objectives

- The overall business objective for this study is to increase Enterprise pledge signings for the ‘A New Way to Work’ scheme and to maintain high retention rates. The results of the research will be used to inform Enterprise activity for the coming year.

- The aim is to improve the Workplace Travel Planning team’s engagement with their target audiences so that the voluntary Enterprise offering;
  1. Is considered relevant as it understands the restrictions upon, and the opportunities held, by it’s target market
  2. Adds value to The Workplace Travel Planning team’s clients
  3. Promotes, enables and measures travel behaviour change.

- The outcomes of the research will build on the existing approach and need to feed into a simple and actionable business strategy that can be implemented across all areas of the business.
Core research objectives

- Explore and quantify a segmentation of SME businesses that can be used by the Workplace Travel Plan team to optimise approach

- Identify and profile the key targets for the Workplace Travel Plan team

- Develop an actionable marketing strategy for the segments that will optimise participation levels and retention as well as deliver actual modal change
**Detailed objectives…**

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<th>Understanding the Business</th>
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<th>Media / Networking Habits</th>
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<tr>
<td>• Respondent role</td>
<td>• Attitude to the business</td>
<td>• Level of engagement currently</td>
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<td>• Business remit and activities</td>
<td>• Desires / aspirations</td>
<td>• Which events attended / what grabs attention</td>
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<td>• Size</td>
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<td><strong>Current Travel Behaviours</strong></td>
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<td>• Typical journeys by staff</td>
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<td>• Protocols for travel</td>
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<td>• Long term commitment and progression ideas</td>
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<td>• Motivations and barriers for change in organ</td>
<td>• Role within their business</td>
<td>• Improvements / marketing strategies</td>
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<td>isation</td>
<td>• Likelihood to drive modal shifts</td>
<td>• Involvement in other programs</td>
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<td>• How changes are implemented</td>
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The research process

**Stage 1**
Qualitative

Understanding the segments and developing the right language and proposition for the quantitative research

**Stage 2**
Quantitative

Validating, measuring and profiling the segmentation solution. Identifying key targets and strategies for development

**Stage 3**
Qualitative

Understanding the segments and developing marketing initiatives to optimise engagement, action and retention
Stage 1: Qualitative methodology and sample

Methodology

- 8 in-depth interviews with small and medium sized business (20-250 employees on site) owners/decision makers with a maximum of three office locations based in/around London aged 18+.
- Mix of age, gender, location, business size, industry, and inner vs outer London represented within the sample
- Recruited to broadly represent the hypothesised segments: Inner, Outer and Security Driven
- Interviews 1 hour in duration and conducted in-situ at business site
Online interviews were conducted amongst 212 business owners / decision makers

- The SMEs were limited to those with 20 – 249 employees, with a maximum of three office locations based in/around London
- The questionnaire was 15 minutes in length and was administered via self-completion online
- We interviewed those aged 18+ with quotas set for age and gender as well as by business size, industry, and inner vs. outer London
- All data shown is weighted to according to the profile of London SME businesses as reflected in the VAT VERR SME statistics which were provided by TfL
- The online survey was completed between 13th of February and 2nd March 2009
Stage 3:
Qualitative methodology and sample

Methodology

- 18 in-depth interviews with small and medium sized business (20-250 employees on site) owners/decision makers with a maximum of three office locations based in/around London aged 18+.
- Sample recruited to quantitative survey segment profiles:
  - 8 Outer Driven
  - 5 Inner Driven
  - 5 Security Focused
- Mix of age, gender, location, business size, industry, and inner vs outer London represented within the sample
- Interviews 1 hour in duration and conducted in-situ at business site
Exec summary and recommendations
Executive summary and recommendations

- Most companies do not currently have formalised travel policies and there is a good level of interest in the TfL Enterprise offer (45% interested, 38% would implement)
  - Highest level of interest from larger companies (68% would implement) who can see the benefits being applicable for their staff and find the logistics / investment required less concerning
  - *Enterprise would benefit from targeting larger companies first and foremost*

- Some key hooks drive interest in Enterprise - cost savings, employee well-being, optional accreditation and company reputation
  - *These benefits should be the primary focus of promotions along with succinct supporting evidence and targeted case studies*

- Research confirmed and developed the business segmentation: Outer Directed Idealists (26%), Inner Directed Pragmatists (31%), Security Driven Traditionalists (43%)
  - *Two main targets identified for Enterprise – Outer Directed and Security Driven.*
  - *Inner Directed, seem a harder sell in the current climate and interest in Enterprise should be driven by generating employee demand rather than chasing stakeholders*
Engaging the segments, a summary

**Outer Directed Idealists 26%**

**Profile:**
Confident, innovative and future focused businesses

**Interest in Enterprise:** High

**Motivations to leverage:**
Cost savings and staff wellbeing
Image, accreditation and ‘competitive’ benefits

**Barriers to overcome:**
Need to see benefit in formalised scheme → Offer accreditation / logo & emphasise role of the representative

**Security Driven Traditionalists 43%**

**Profile:**
Traditional, hierarchical, conservative businesses

**Interest in Enterprise:** High

**Motivations to leverage:**
Cost savings and a ‘free’ benefit to offer staff
Set savings target and design action plan for target

**Barriers to overcome:**
Can be critical of ‘soft’ benefits - need to prove the benefits *(tangible evidence / case studies)* and ensure the program meets expectations

**Inner Directed Pragmatists 31%**

**Profile:**
Focused on day-to-day management of business

**Interest in Enterprise:** Low

**Motivations to leverage:**
Meeting staff demand, ease of implementation and dedicated support from representative

**Barriers to overcome:**
May not believe staff need / want Enterprise – access companies where staff demand exists or engage with staff before business leader
The business segmentation
How will the segmentation be used?

- The Enterprise segmentation aims to address two key objectives:
  - To identify which segments will be most suitable for short-term targeting / initiatives as well as in the longer term
  - To develop strategies for communicating with London business decision makers in order to encourage consideration of the Enterprise scheme and attitudinal and behavioural (modal) change towards sustainable travel through specific segment trigger points
Why segment London business decision makers?

- A segmentation aims to identify groups within a population that possess similar characteristics.

- The most common and effective characteristics on which to segment a population are on attitudes as these are stable and enduring qualities which can often act as predictors of choices and behaviour.

- Using attitudes to segment a market is more effective than relying on demographic or firmographic distinctions as this allows us to take into account a complex range of factors in decision making and how they interact to form a holistic picture.

- By identifying mutually exclusive groups within London business decision makers you can create profiles or ‘types’ in terms of their demographics, firmographics, typical behaviours and media consumption.

- This ultimately allows you to target specific groups more effectively and develop tailored communications strategies for encouraging uptake of the Enterprise scheme.
Segmentation methodology

- The segments are grouped on the basis of their pattern of answers to the following questions:
  - Company outlook (QB1)
  - Attitudes to business (QC1)
  - Personality at work (QC2)
- All data was standardised to ensure that the attitudinal measures were more reliable and meaningful.
- In order to determine the optimum number of segments a hierarchical cluster analysis was run, this enabled us to identify there was between 3 and 4 segments in the data.
- We then conducted a K-means cluster analysis which enabled us to arrive at the final 3 segment solution.
- We decided this was the most useful solution on the basis of the following criteria:
  - Robust base – with a small sample size it was important to identify groups that were large enough to profile with confidence yet also small enough to represent a distinct group in the market.
  - Replicability – the same 3 segments were identified when looking at a random half of the sample, which validates their existence.
  - Intuitive sense – the segments seemed to fit with the original segmentation and findings from the initial qualitative phase and profiles of their behaviour matched their characteristic attitudes.
How are differences between the segments identified?

- When looking at the segments we are pulling out differences between the groups in order to communicate the characteristics of the segments clearly.

- We calculate these differences by creating an index to see whether a segment’s response is more or less than the average response.

- For example:

  Segment score = 40%
  Total sample score = 50%
  Index = 40/50 x 100 = 80

- This helps us to generate more meaningful interpretations of the segments.

- Throughout the remainder of this report when not talking about the segments, we will focus on majority figures in order to present a landscape view.
Three London business decision maker segments were identified

<table>
<thead>
<tr>
<th>Segment</th>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outer Directed Idealists</td>
<td>26%</td>
<td>“I have a vision for my business and am willing to take financial risks in order to make it happen”</td>
</tr>
<tr>
<td>Security Driven Traditionalists</td>
<td>43%</td>
<td>“A business works best with hierarchy, structure and prudent spending”</td>
</tr>
<tr>
<td>Inner Directed Pragmatists</td>
<td>31%</td>
<td>“I concentrate on managing my team and applying practical business sense day to day - I don’t make ambitious plans for the future”</td>
</tr>
</tbody>
</table>

**THE BIG IDEA**<br>*(Small thinking Big)*

**IMPROVING THE PROCESS**<br>*(Big thinking Big)*

**DAY TO DAY MANAGEMENT**<br>*(Small thinking Small)*
Sizing the segments

- Inner Directed Pragmatists: 31%
- Outer Directed Idealists: 26%
- Security Driven Traditionalists: 43%
Profile: Outer Directed

Company profile
Event Co-ordination Company
Inner London, 25 employees
Market leader / Outshone competition
Fast trajectory of company growth

Manager Profile
Ambitious go-getter
Never misses a trick – innovative and creative
Dynamic and modern approach to business

Company Ethos
Branding and future vision for company is strong
Heavily promote the ‘brand’
Image of company is the biggest asset (all smoke and mirrors!)

Management Approach
Led by core senior team, but has dynamic and interesting staff
Staff also self-starters free to follow new leads or their instincts
However, people are less important than the overall business brand and vision
Used to there always being a new face

‘You can always find good people to fill the roles, we are a company people want to work for’
‘We have a brand book we like to give to clients to talk about our brand values’
Outer Directed Idealists 26%

- 84% Male
- 16% Female
- Average age 44
- 88% Senior team*
- 12% Main decision maker
- 67% 20-49 employees
- 24% 50-99 employees
- 9% 100-249 employees
- 35% drive to work
- 80% Inner London*

- This group are the **least financially cautious** of all groups even in the current economic climate.

- They feel that they would **take risks others wouldn’t** in order to make opportunities for their business and are **motivated by more than financial benefit** when making business decisions.

- They describe themselves as **visionary** with **strong marketing acumen**, this group have big ideas for where they want their businesses to go and don’t tend to focus on the details. They tend to use networking, PR and press as vehicles to promote their company.

- This group consider themselves to be **caring** leaders and they are **extremely focused on the well-being of their employees**. They disagree that some staff benefits can be an unnecessary luxury and expense and would not describe themselves as strict, private or ruthless authority figures.

* Overindex
Outer Directed attitudes and business approach

**Business Leader Attitude**
- Innovative and creative
- Entrepreneurial spirit
- Competitive and ambitious
- Actively seeking opportunities
- Risk taking
- Excellent business acumen

**Company Ethos**
- Strong branding and vision for the company
- Want to be seen and heard
- Company vision clearly communicated to staff and clients
- Innovation rewarded
- Potentially cut-throat / will do what is right for the business rather than staff if it comes down to it

**Relationship with staff**
- Social and engaging environment
- Modern style of management
- Close and open relationship with staff
- Fosters innovation
- But free-flowing environment means employees can come and go quite easily

Confident, innovative and ambitious businesses
Profile: Inner Directed

Company profile
Printing Company, Inner London
Established for 20 years
Little competition or growth
Recently reduced from 80 → 40 staff

Manager Profile
Typically just getting by, happy with the status quo
Detail / day to day logistics key focus
Dislikes disruption or change
Struggling in current climate - can’t see the wood for the trees

Company Ethos
Have a niche specialism that secures a minimum level of business
Low margins work, have to work hard for average profit

Management Approach
Claim to have an open door policy but prefer to be left alone
Will respond to staff when enough noise is made but don’t like to anticipate company need

‘These are challenging times, we have been having to make a lot of changes which takes a lot of time and work’

‘It is frustrating when staff leave as recruitment is very time consuming and you can never be certain of your choices’
Inner Directed Pragmatists 31%

- 88% Male*
- 12% Female
- Average age 45
- 75% Senior team
- 25% Main decision maker
- 72% 20-49 employees*
- 16% 50-99 employees
- 12% 100-249 employees
- 68% drive to work*
- 43% Outer London
- 57% Inner London

- This group are flexible, collaborative, **hands on managers**. Their companies **lack structure and hierarchy** and this is how they like it, all **employees have the opportunity to voice their opinion**.

- They are **caring** leaders but they are less focused on their employees than the other segments, they feel that some **staff benefits can be an unnecessary expense** and being **conservative with company spending** is their main priority at present under the **current economic climate**.

- These individuals are more **willing to take risks** than the Security Driven segment, they are **open to listening to new ideas** for ways to improve their business but the **day to day running of their company** and the happiness of their employees is their first priority.

- When it comes to promoting their business, this group feel they have good business sense but lack marketing acumen, they do not feel **competitive, visionary or experimental**.

- They are the most likely group to use **family & friend contacts** in order to promote their business.
### Inner Directed attitudes and business approach

#### Business Leader Attitude
- Feel strong in industry but out of depth beyond their specialism
- Keep on top of the day to day management
- Quite process driven to help manage their business
- Little marketing knowledge or interest
- Fear change – either growth or decline

#### Company Ethos
- On a steady trajectory, not to be swayed off course by business leaders or employees
- Less likely to have brand or mission statement / mantra
- Process driven
- More ‘jobbing’ approach to business
- Culture of staff socialising but management can sometimes be a bit distant

#### Relationship with staff
- Like to think of themselves as staff focussed
- However, in reality they tend not to proactively seek feedback from staff
  - Wait for staff to come to them

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**Day-to-day approach to business is more challenging in current climate**
Profile: Security Driven

Company profile

Food manufacturer

Small office in inner London (12 staff), production site in Enfield (55-65 staff)

Strong player in market but conservative in approach – cutting back rather than seeking growth in current climate

Manager Profile

Traditional businessman

Confident but reserved

Many years of experience rather than a maverick

Ambitious but bottom line driven

Company Ethos

Strong and successful product, good branding but not ‘outstanding’

Cautious approach to growth – consolidating and credit-checking current accounts

Management Approach

Division between management team and other employees

Parent-child style of management

Perks for office based staff but not for manufacturing

High turnover in manufacturing staff

‘We are reducing credit limits for even our larger clients at the moment, we are taking a sensible approach’

‘There is high turnover at the factories, giving benefits would be a nightmare logistically so we don’t’
Security Driven Traditionalists 43%

80% Male
20% Female*

Average age 43

73% Senior team
27% Main decision maker*

54% 20-49 employees
25% 50-99 employees
21% 100-249 employees*

50% drive to work
45% Outer London*
55% Inner London

- This group are distinctly **risk averse** when it comes to **financial business decisions**, they prefer to make changes that **consolidate the security of their business**.

- The future focus of their company is to **manage budgets and reduce unnecessary costs**, they would only consider making changes to their company if they could see a **financial benefit** in doing so. They are by nature, **competitive, detail focussed and prudent**.

- They are strong advocates of a **strong hierarchy and structure within their company**, and as such they believe they can be **private / solitary, strict and ruthless leaders**.

- Although this group feel it is important to focus on the well-being of employees, they are less likely than average to call themselves caring and they agree that **some staff benefits can seem like a luxury and an unnecessary expense**.
Security Driven attitudes and business approach

<table>
<thead>
<tr>
<th>Business Leader Attitude</th>
<th>Company Ethos</th>
<th>Relationship with staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitive yet conservative</td>
<td>Use marketing / branding to promote business but not as an ethos of the company</td>
<td>Parent – child style of management</td>
</tr>
<tr>
<td>Financially and margin driven</td>
<td>Quite structured in approach / standardise systems for ease of administration</td>
<td>Less social / engaged than other segments</td>
</tr>
<tr>
<td>Risk averse</td>
<td></td>
<td>Like a stable workforce to avoid logistics of having to re-recruit</td>
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Traditional and conservative approach to business
Current business context
Profile of London Small & Medium Enterprises

A representative spread of industries*

- 11% Hotels/Catering
- 10% Production/Manufacturing
- 10% IT/Computer/Electronic equipment/Software
- 9% Wholesale
- 9% Property/Bus. services
- 8% Publishing/Printing/Media
- 6% Banking/Mortgage/Finance
- 5% Insurance/Legal services
- 5% Construction
- 5% Advertising/Marketing
- 5% Retail
- 5% Transport
- 9% other (< 5% by category)

Profile of business executives

- 23% Main decision-maker
- 77% Senior decision-maker
- 25% 18-35 years
- 30% 36-45 years
- 32% 46-55 years
- 10% 56-65 years
- 3% 66+ years

*Figures shown are weighted to reflect VAT VERR SME statistics
SMEs are attitudinally and demographically diverse

- A number of dimensions upon which companies differ even within segmentation parameters:
  - Size
  - Personality
  - Industry
  - Location
  - Global vs Local

- SME businesses do not associate themselves as a homogenous group or indeed as ‘enterprises’ distinct from companies with more than 250 employees. Companies associate more closely with their industry or business network (clients and competitors) than as London SMEs.

- When discussing benefits or presenting case studies, appearing understanding of their industry and company profile, over and above segmentation will increase receptiveness and empathy.

Targeting each businesses needs, culture and make-up is more appropriate than positioning Enterprise for ‘small to medium sized companies’ (SMEs)
The current economic climate is a hot topic of discussion

- The dominant media and business discourse at the moment centres on the credit crunch

- Most business managers express concern and uncertainty and many have had to adapt business practices:
  
  "It's very unclear what the next year will hold for the economy and we need to be cautious about decisions we make and any risks we take”
  
  Security Driven

  “At this stage we seem to be as busy as ever, but you can't be complacent and other bigger companies have made redundancies and you can't assume you'll be safe”

  Outer Directed

  “We have reduced the office space to one floor and have had to make redundancies, it is a tough time for small businesses”

  Inner Directed

- As such, close attention is paid to media coverage of the economic crisis

**Whilst some companies are certainly more financially cautious than others, there is an overall cautiousness towards financial forecasting, outlay and risks**
These trends reflected in magazine readership and subscription

- 9-in-10 companies are regular readers/subscribers to magazines focused on business
- Industry-specific most popular

![Graph showing magazine genres and subscription rates]

Source: QD1 Do you or your company subscribe to or regularly read a magazine in any of the following genres?

Base: All respondents (n = 212)
This context frames many business decisions

**Conservative spending is seen to be important in the current economic climate**

- Half would only make changes in their company if they could see a financial benefit

**Yet having a competitive edge is extremely important to businesses**

- Particularly in today’s competitive economic climate
- Keeping informed and being focused on innovation are just some ways SMEs try to stay competitive

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*Schemes/initiatives that can aid companies in improving their competitive edge while producing financial benefits would resonate well with SMEs, although they can be cautious and there is a need for confidence in ‘proven’ benefits*
However, whilst interest is high, decision makers can be cautious

Financial Savings
- SMEs are looking for opportunities to streamline costs and increase efficiency
- Evidence of cut backs:
  - Reduced office space
  - Changing suppliers / challenging current contracts
  - Reducing staff benefits – e.g. Company cars

Competitive Edge
- Developing points of difference within the market
  - To attract new business and protect current clients
  - To keep and attract the best talent
- Watching out for market trends / competitor activity and adapting business style accordingly

Stakeholders are often sceptical and cautious when it comes to making change, as they need a good level of confidence before committing

Proven credibility of Enterprise’s benefits are critical to success
Business management style
Business management encompasses a number of elements

Day to Day
- Pragmatic approach to business
- Every day decisions
- Winning business contracts and servicing customers

Future
- Company vision and strategy
- Consolidating current status or projecting future growth
- Cultivating desired business culture

The core considerations for businesses, although mindset of business stakeholders varies – as illustrated by the segmentation
Whilst employee well-being is seen to be extremely important there is a need to highlight value and benefits.

It is important to focus on employee well-being if a business is to be productive and successful: 93%

88% I am extremely focused on the well-being of my employees

Some staff benefits can be an unnecessary luxury and expense: 59%

Source: QC1. Here are some statements others have made about managing a business, to what extent do you agree with each?

Base: All respondents (n = 212)
A ‘new’ style of management

- Business style and culture is broadly led and defined by the core management team. Companies vary in terms of their overall approach on a number of levels:
  - Hierarchy, structure, level of control vs autonomy

- However, there is an overall trend towards a more ‘modern’ approach to staff management, even amongst Inner Directed and Security Driven segments:
  - Flexibility to meet employee needs
  - Focus on professional and social development
  - Working to support both business and staff needs
  - Developing approaches where innovation and staff motivation thrives
  - More flexible time keeping (staff work when suits them as long as they work hard)

*Perceived to be a positive move where staff and companies thrive, but also conversely, results in longer hours and an overall feeling of less structure and ‘time-poor’ business*
The modern structure of business is also reflected in the quantitative data

- **Almost 7-in-10 SMEs believe their company is non-hierarchical and feel their staff can voice their opinions**

Top 2 box Agree / Strongly Agree

- **My company is not hierarchical and staff of all level feel they can voice their opinion**
  - 66%
  - Women (89%); 100-249 employees (86%)

- **Brand, Marketing and PR initiatives are very important to my business**
  - 65%
  - 36-45 years old (73%)

- **Some staff benefits can be an unnecessary luxury and expense**
  - 59%
  - Women (70%); 26-35 yo (65%); 100-249 employees (76%)

- **A company works best with a strong hierarchy and structure**
  - 54%
  - 36-44 years old (66%)

- **I am interested in reducing the carbon footprint of my business**
  - 52%
  - Women (70%); 26-35 yo (65%); 100-249 employees (76%)

- **I would only consider making changes in my company if I could see a financial benefit**
  - 48%
  - Women (70%); 26-35 yo (65%); 100-249 employees (76%)

Source: QC1. Here are some statements others have made about managing a business, to what extent do you agree with each?

Base: All respondents (n = 212)
What are decision makers’ attitudes towards business management?

Source: QC1. Here are some statements others have made about managing a business, to what extent do you agree with each?

*Base: All respondents (n = 212)*

### Top 2 box Agree / Strongly Agree

1. **It is important to focus on employee well-being if a business is to be productive and successful**: 93%
2. **It is important to keep on top of new developments and innovations in order to stay one step ahead of the competition**: 91%
3. **I am always looking for new and innovative ways to improve my business**: 90%
4. **Having processes and procedures in place ensures an efficiently run business**: 90%
5. **I am extremely focused on the well-being of my employees**: 88%
6. **Business opportunities don’t come to you, you have to go out and find them**: 82%
7. **In the current economic climate, it is important to be conservative with company spending**: 82%
Attitudes towards CSR/corporate schemes
Policies and procedures are a necessary element of management

- Businesses managers have a mix of positive and negative viewpoints on structured policies and procedures within the business.

<table>
<thead>
<tr>
<th>Positive</th>
<th>Frustrations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost savings</td>
<td>Time consuming</td>
</tr>
<tr>
<td>Control / structure</td>
<td>Restrictive of staff</td>
</tr>
<tr>
<td>Efficiency</td>
<td>General negative perceptions</td>
</tr>
<tr>
<td>Guidelines</td>
<td>Red tape / bureaucracy / documentation</td>
</tr>
<tr>
<td>Business necessity</td>
<td>A ‘must do’ rather than ‘want to do’</td>
</tr>
</tbody>
</table>

- Businesses are hesitant therefore to implement procedures unless necessary:
  - Where there is a clear benefit or need
  - Where compliance demands
  - Where there is strong employee demand / advocacy

It is important that Enterprise emphasises the positives when talking to business leaders and reassures on the potential frustrations of implementing a formalised travel plan.
CSR schemes are often perceived to be the domain of big business

For many respondents there is a belief that ‘CSR’ is the domain of big business:

- A formalised and documented approach / commitment
- Requires investment on behalf of the company / reinvesting profits back to society

SMEs prefer to take a less formal approach to good business practice:

- Cautious not to over-commit
- Environmental/charitable initiatives common to most SMEs but often driven by a single or small number of champions

“We have recycling bins and use Ecover products & an environmental policy, the office manager is very green so she sets the example and agenda” Outer Directed

“We donate to a local charity and have discounted rates for our services for charitable causes” Security Driven

“We are going to apply for ISO14000 as I feel it is a valuable and meaningful accreditation” Security Driven

“I don’t think we have the resources for formalised CSR in the way Banks or large corporations do” Inner Directed

**Enterprise should promote specific ‘benefits’ of Enterprise to business rather than formalised ‘CSR’ program**
Corporate schemes are not widely endorsed by SMEs

**Little consistency in which schemes SMEs participate in**
- Just under half participate in these types of schemes
- Smaller SMEs more likely to be involved with one
  - A widely-recognised affiliation may provide them with a formal sense of establishment to potential clients/customers?

**There are some positive associations with CSR**
- Seen to project a positive image of businesses which can encourage loyalty and differentiate businesses above competitors
- Yet 3-in-10 believe they add unnecessary costs and don’t believe these types of schemes make a difference

*Enterprise should associate with the positives of reputation and enabling better business practices and reassure on real benefits and level of support to business*
Little consistency in participation in corporate schemes

- Less than half of SMEs are currently involved in some type of corporate scheme
  - Smaller SMEs are more likely to be involved
    - Those with 20-99 employees - particularly the smallest ones

Source: AQ7. Is your company currently a member of, or involved in responsible business practice schemes with any of the following external bodies?
Base: All respondents (n = 212)
What are decision makers’ attitudes towards CSR/corporate schemes?

- 3-in-10 feel these CSR schemes don’t make a difference
- The schemes are seen to project a positive image of businesses which can encourage loyalty and differentiate businesses above competitors

### Top 2 box Agree / Strongly Agree

- Demonstrating responsible business practices would encourage loyalty amongst my current customers / clients: 62%
- Taking on corporate responsibility actions can help to differentiate my business above my competitors: 58%
- Engaging in corporate social responsibility plans would project a positive image of my company for PR and marketing purposes: 54%
- Corporate social responsibility schemes fit well with my company vision and ethos: 50%
- Reducing the carbon footprint of my business would reduce our costs in the long run: 43%
- Corporate social responsibility schemes involve unnecessary costs: 34%
- I don't believe my employees would be interested in a corporate social responsibility scheme: 30%
- I don't believe corporate social responsibility schemes make a difference: 30%

Source: QC4. Next, here are some statements that relate to corporate social responsibility & responsible business practices.

**Base: All respondents (n = 212)**
ISO 14000 Standardization

Who is targeted?
Pitched at ‘visionary’ decision makers who want to go beyond compliance with legislation.
ISO 14000 is marketed as the antithesis of a business cost

Dual benefits
1. Promotes images of business as socially responsible
2. Provides ROI

Appeals to the ego and ambition of managerial staff:
“The manager who is "too busy managing the business" to listen to good sense about environmental management could actually be costing the business, instead of achieving benefits like those above.”

Key words
1. Proactive management
2. Vision
3. Understanding
4. Strategic approach
# Investors in People

<table>
<thead>
<tr>
<th>Who is targeted?</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sold as an inclusive standard with a low barrier to entry which is suitable for almost all organisations</td>
<td>Investors in People provides a flexible framework, which any organisation can adapt for its own requirements</td>
</tr>
</tbody>
</table>

The website repeatedly points out that the standard is non prescriptive & simple to comply with

It mirrors the business planning cycle (Plan, Do, Review), making it clear for organisations to follow and implement in their own planning cycle.

### Appeals to the ego and ambition of managerial staff:

"Investors in People recognises that organisations use different means to achieve success through their people. It does not prescribe any one method but provides a framework to help you find the most suitable means for achieving success through your people."

### Key words

1. Making a difference
2. Achieving success
3. Relevant, accessible and attractive
4. Knowledge, skills, motivation
What can Enterprise learn from IIP and ISO?

There are some common principles between ISO14000 and IIP despite differences in how they are marketed.

Both focus on how the standard ensures more effective ways of working, either in terms of cost, time or both:

**IIP**

“...the Standard helps organisations to improve performance and realise objectives through the management and development of their people.”

**ISO 14000**

“ISO 14000 is designed for those with the vision to understand that implementing a strategic approach can bring return on investment in environment-related measures.”

Businesses can use their compliance to the standards as evidence of their investment in staff or improved performance.

The standards both act as validation of a specific commitment to responsible business practice.

Investment in employee welfare and training and dedication to sustainability and improved environmental performance respectively.

In addition to the reputation benefits both standards align themselves with more pragmatic and tangible reasons for adoption.

The focus with both remains on potential ROI, efficiencies and cost savings.
Networking & business relationships
Networking opportunities are generally industry specific

- Networking is perceived as immensely useful for many businesses
  - Focus on *industry specific events* (39%)
  - About *keeping up to date* and *competitive edge*
  - *New approaches* and methods in the sector
  - Desire to get in on *trends* / spying on the competition
  - *Social* aspects also enjoyed – peers, current and potential clients
  - International and national events

- However, networking can be quite time intensive and does not have direct profit associations
  - Not all businesses use or attend networking events for this reason – 27% don’t attend any events

*Opportunity to target specific industry events of high potential industries may exist although much networking seems to be informal*
Conference and event participation

- 7-in-10 decision makers attend conferences and events
- Larger companies more likely to participate
- Industry-specific most popular

Source: QD2 Do you personally attend any conferences or events in each of the following areas?
Base: All respondents (n = 212)
Promotion is valued and used by some companies

- Promoting company to drive growth (or secure current business) is part of a standard business approach for many
  - Particularly Outer Directed business leaders

- Traditional methods of networking / advertising / newsletters / media / self-promotion are still dominant

- Interestingly some of the smaller / more innovative companies are starting to use interactive media platforms to promote their business:
  - Email newsletters
  - LinkedIn/Facebook/ Twitter

Helping businesses promote their involvement in Enterprise alongside other PR will potentially generate awareness and interest amongst other businesses
Marketing tactics

- Larger SMEs more likely to employ more marketing tactics

**Top 2 box Agree / Strongly Agree**

- Networking: 64%
- Personal networking: 62%
- Public relations and press: 44%
- Advertising: 39%
- Utilise family and friend contacts: 34%

Source: QD3 How often would you say you use each of the following marketing tactics to promote your business?
Base: All respondents (n = 212)
SME travel behaviours
Travel in London

- Londoners pride themselves on knowing their travel options

- The excellent infrastructure is acknowledged and many area already making the most of this
  - Occasional gripes are made by businesses in London feeling ‘penalised’ for just doing their jobs
  - ‘I don’t understand why we don’t get a residents permit and have to pay congestion charge every day for the van when we’re located in Holborn’

- On the whole, it is felt that Londoners travel fairly sustainably already.
Employees already commute relatively sustainably

On average only half of decision-makers use sustainable travel for commuting – half drive to work

- Their employees however are much more likely to use other, more sustainable, forms of transport
  - 7-in-10 employees use sustainable forms of transport compared to only 5-in-10 DMs

All SMEs provide facilities for their employees for commuting

- The types of facilities provided are broad
  - The two most popular are car parking and shower facilities amongst half of SMEs
  - Larger SMEs are much more likely to have these types of facilities in place already for their employees

And much of the ‘infrastructure’ required for sustainable travel is already in place
How do you / your employees get to work?

- SME decision makers are less likely to use sustainable means of transportation to get to work

<table>
<thead>
<tr>
<th>Mode of Transportation</th>
<th>SME decision makers</th>
<th>SME employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive to work</td>
<td>31%</td>
<td>52%</td>
</tr>
<tr>
<td>Take public transport to work</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>Cycle to work</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Walk to work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sustainable travel (net)</td>
<td>48%</td>
<td>69%</td>
</tr>
<tr>
<td>Not sustainable travel (net)</td>
<td>31%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Unsurprisingly, this is more prevalent among outer London respondents (75%).

Source: QE1. Thinking about a normal day, how do you get to work?; QE2. And approximately what proportion of your employees use each of the following forms of transport to get to work?
Base: All respondents (n = 212)
Many facilities provided, but not necessarily actively promoted

- All provide some facilities to aid employees in their daily commute

<table>
<thead>
<tr>
<th>Facility</th>
<th>Percentage</th>
<th>Source: QE3. Do you currently provide any of the following facilities or aids to help your employees with their daily commute? Base: All respondents (n = 212)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car parking facilities</td>
<td>55%</td>
<td>Most likely in outer London (79%) and SMEs with 50 - 99 employees (69%)</td>
</tr>
<tr>
<td>Shower &amp; changing facilities</td>
<td>45%</td>
<td>SMEs with 100 – 249 employees are most likely to provide season ticket loans (58%)</td>
</tr>
<tr>
<td>Season ticket loan for tube / train / bus</td>
<td>42%</td>
<td>SMEs with 50 - 99 employees are most likely to provide home working (49%)</td>
</tr>
<tr>
<td>Secure bike rack</td>
<td>38%</td>
<td>SMEs with 100 – 249 employees are most likely to provide company cars (59%)</td>
</tr>
<tr>
<td>Homeworking</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>Flexitime</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Company cars</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Cycle to Work scheme</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Company account with minicab firm</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Car pooling scheme</td>
<td>7%</td>
<td>SMEs with 100 – 249 employees are most likely have car pooling schemes (19%)</td>
</tr>
<tr>
<td>Suggested walking routes</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Other (Specify)</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>
Which Enterprise initiatives are already in place?

- Larger SMEs are more likely to have already implemented Enterprise-like initiatives

<table>
<thead>
<tr>
<th>Top 10 Enterprise Initiatives Already Implemented</th>
<th>Company size</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20-49</td>
</tr>
<tr>
<td><strong>Shower and changing facilities</strong></td>
<td>39%</td>
</tr>
<tr>
<td><strong>Interest free loan schemes for annual travel passes</strong></td>
<td>31%</td>
</tr>
<tr>
<td><strong>Smarter working package</strong></td>
<td>30%</td>
</tr>
<tr>
<td><strong>Public transport information circulation</strong></td>
<td>26%</td>
</tr>
<tr>
<td><strong>Bike rack / stands schemes</strong></td>
<td>24%</td>
</tr>
<tr>
<td><strong>Tax break bicycle leasing schemes</strong></td>
<td>16%</td>
</tr>
<tr>
<td><strong>Pool oyster card information</strong></td>
<td>12%</td>
</tr>
<tr>
<td><strong>Free Registration on Liftshare website to encourage carsharing</strong></td>
<td>12%</td>
</tr>
<tr>
<td><strong>Walking maps</strong></td>
<td>11%</td>
</tr>
<tr>
<td><strong>Cycle to work day</strong></td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these are already in place? Please select as many as you wish.
Base: All respondents (n = 212)
Sustainable travel not the norm for work-related journeys (outside of commuting)

**Majority of SMEs do not have a policy in place for sustainable work-related travel**

- Average travel expenditure for SMEs is £85,500
- Only ¼ have such a policy in place
  - And they are usually found amongst larger SMEs (100-249 employees)

**There is interest in encouraging change but the benefits must be motivating enough to justify the effort**

- A majority would encourage some form of sustainable travel change and feel it would fit with their company image and ethos
- However, 6-in-10 do not believe sustainable travel is a practical option for their employees

**There is a real opportunity to promote Enterprise by encouraging sustainable travel for work-related journeys (outside commuting)**
Companies outlay significant capital each year on travel

81% of businesses require employees to travel for work purposes

Within this…

<table>
<thead>
<tr>
<th>Distance</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short distance (within London)</td>
<td>97%</td>
</tr>
<tr>
<td>Medium distance (within UK)</td>
<td>95%</td>
</tr>
<tr>
<td>Long distance (outside UK)</td>
<td>86%</td>
</tr>
</tbody>
</table>

SMEs annual travel expenditure

£85,500

Source: QE4. Does your business require some of your employees to travel often for work purposes? QE6 Thinking about the work-related journeys your employees make in a typical week, how many would you say cover the following distances? QE7 Approximately what is the annual travel expenditure of your business?

Base: QE4, QE7 All respondents (n = 212) QE6 Businesses whose employees are required to travel for work purposes (n=174)
Does your business have sustainable travel policies in place?

- Most SMEs do not have sustainable travel policies in place

Source: QE5. And does your business currently have a policy for work-related journeys that encourages sustainable travel?
Base: All respondents (n = 212)
Travel not always a key area of focus in business management currently

- Commute is not considered part of the work day remit
  - Many managers not aware of/interested in how their staff get to work

- Work travel considered part of the cost of running a business
  - In some jobs providing ‘executive’ travel is considered a necessary perk to keep staff happy

Therefore, few businesses interviewed historically had ‘formalised’ travel guidelines for work travel or employees commute (the numbers show Security most likely to have formalised plan)
  - A common-sense and cost-saving approach was generally taken
  - Inner London businesses had greater informal promotion of sustainable travel options due to ease and time saving benefits over cars

However, in the current economic climate where many businesses are looking for greater efficiency, cost-savings and margin improvements travel is increasingly becoming an important consideration
  - Many companies reviewing and refreshing their policy/approach
Travel measures in place already tend to have been developed ad hoc and many are not actively promoted

**Cycle to Work Scheme**
Often implemented due to demand from one employee
Little active promotion or support for the scheme however

**Travel Card Loans**
Historically these have been implemented as part of staff packages and positioned as a company perk

**Corporate Accounts / Taxi Reimbursement**
For companies where travel is required for work
Can project the impression of seniority of staff / prestigious impression of company
9 in 10 SMEs are open to encouraging more sustainable travel

- More than 9-in-10 SMEs would encourage more sustainable forms of transport amongst their employees
  - Public transport is the most popular choice

<table>
<thead>
<tr>
<th>Mode</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public transport</td>
<td>60%</td>
</tr>
<tr>
<td>Cycling</td>
<td>44%</td>
</tr>
<tr>
<td>Car sharing</td>
<td>33%</td>
</tr>
<tr>
<td>Smarter Working (flexi-hours, remote working etc)</td>
<td>25%</td>
</tr>
<tr>
<td>Walking</td>
<td>22%</td>
</tr>
</tbody>
</table>

I would not try to encourage any of these 5%

Source: QF6. Now thinking about if you were to consider encouraging changes in the forms of transport chosen by your employees, which do you think you would be most likely to encourage? Please tick as many as you wish

Base: All respondents (n = 212)

20-49 employee sized firms are more likely to consider public transport (64%) than 100-249 sized enterprises (45%)
Interest in modes varies on profile of business and engagement in Enterprise

**Inner vs. Outer London**

- **Inner London boroughs** more likely to select
  - Walking packages
- **Outer London boroughs** more likely to select
  - Car sharing
  - Cycling

**Engaged vs. Unengaged**

- **Those likely to implement** more likely to select
  - Public transport
  - Car sharing
- **Those not likely to implement** more likely to select
  - Cycling*
  - Smarter working hours*

---

Source: QF6. Now thinking about if you were to consider encouraging changes in the forms of transport chosen by your employees, which do you think you would be most likely to encourage? Please tick as many as you wish. Base: All respondents (n = 212)

Tailoring packages for inner and outer London seems intuitive

All differences shown are significant except those marked with an asterix. Engagers/non engagers based on likely to implement QF8
What do SMEs think about sustainable travel as a CSR scheme?

- Interestingly, 7-in-10 SMEs would like their company to be accredited for its contribution if they were to take part
  - Recognition seen as an additional benefit to Enterprise

Top 2 box Agree / Strongly Agree

- Encouraging sustainable travel would fit in with my company’s image and ethos: 78%
- My company ought to do more to foster sustainable travel amongst my employees: 78%
- I would like my company to be accredited for its contribution to sustainable travel if we were to take part in the scheme: 73%
- The benefits from sustainable travel are not high enough to justify the effort of implementing the Enterprise scheme: 72%
- I have already been thinking of ways to encourage sustainable travel within my business: 63%
- Sustainable travel is not a practical option for my employees: 62%
- My company does enough to encourage sustainable travel already: 62%

Source: QF5. And now thinking about what the Enterprise scheme is trying to achieve, please indicate to what extent you agree with each of the following statements regarding the encouragement of sustainable travel within your business.

Base: All respondents (n = 212)
There are perceived barriers to active promotion of sustainable travel:

- Time investment
- Financial outlay
- Administration required / red tape
- Tax restrictions (can’t give staff free travel)
- Commute is not remit of business
- Travel planning – need time to plan
- Lack of enough facilities
- Sweaty staff turning up to meetings
- Change of clothes
Some companies had positive experiences with sustainable travel practices

- Some case study examples:

  **Cycling:**
  Company introduced cycle to work scheme and found a gradual groundswell of uptake, employees feel this is a real benefit and increases longevity of staff contracts

  **Cars:**
  in a recent move to deliver cost savings a company had decided to remove company cars. Staff have started to use PT and found increased efficiency and client visits per day

  **Buses:**
  Manufacturing site considering re-introduction of bus to ferry employees from set pick up and drop off points increases attendance, punctuality and staff satisfaction as well as reducing car use

*These businesses seem primed to consider more opportunities for sustainable travel options which in turn increases potential interest in Enterprise*
Segments current travel practices
Outer Directed
Current Travel Behaviours

- This group are the least likely to drive to work themselves and have the least number of employees that drive to work.
- They are much more likely than the other segments to have employees take public transport to work or cycle.
- When it comes to facilities they provide, they are the least likely to have a car park, and the most likely companies to offer flexitime as a way of working.
- Most of the business related journeys that their employees make are within London, yet this group spend significantly more on annual travel expenditure than the other segments (approximately £121k).
Inner Directed
Current Travel Behaviours

- Over two thirds of this group drive to work and they believe over a third of their employees drive to work and under half take public transport.

- In terms of facilities they provide, this group are the most likely of all segments to provide a car park, but also a secure bike rack.

- They are the least likely segment to already have a sustainable travel policy in place for business related journeys yet spend approximately £93k on business travel expenses annually.
Security Driven
Current Travel Behaviours

- Half of this group drive to work themselves, yet approx. a third of their employees drive to work.

- They estimate that half of their employees currently take public transport to work.

- In terms of facilities they provide, this group are the most likely of all segments to supply their employees with company cars, the majority also provide a car park

- This group are the most likely to already have a sustainable travel policy in place for business related journeys and also have the lowest annual expenditure on travel of all segments (approx £59k)
Appeal of the Enterprise scheme
How Enterprise was evaluated

- A number of pieces of stimulus were presented in the qualitative and quantitative research to communicate and explore the Enterprise concept. The stimulus package included:

  1. Outline of concept and implementation plan
  2. Benefits of the scheme
  3. Specific examples of initiatives and packages
Overall there is a positive response to the Enterprise concept

“I think it’s a brilliant idea, there is nothing wrong with it and there are probably opportunities for every company to improve their practices” Outer Directed

“It makes intuitive sense, it has benefits in terms of healthier and happier work force” Outer Directed

“It seems like a formalised and tailored plan that is free, there seems no harm in giving it a go” Outer Directed

“I don’t really understand what it would offer that we couldn’t do ourselves” Outer Directed

“The benefits are clear, and the cost savings would be great, we’d be interested in hearing more about this” Security Driven

“Driving in London is a nightmare, we stopped our reps using cars and their productivity increased” Security Driven

“I do wonder how much work it would entail for us? We don’t have many spare resources” Inner Directed

“Our staff have been asking for more bike facilities, this would encompass this” Inner Directed

A good level of interest and engagement with the overall concept
Enterprise is motivating for SMEs particularly with the backing of TfL

**Enterprise has greater appeal when positioned as offered by TfL**

- This is particularly true for smaller SMEs (20-49 employees)
- Offering Enterprise through TfL gives legitimacy to the scheme

“TfL have a good knowledge and resources at their fingertips, they’d also be able to offer proper support”

**Only 1-in-3 SMEs find Enterprise unappealing and are unlikely to implement**

- Smaller SMEs are least likely to consider implementing Enterprise
- Once people show interest in the scheme, there is an 87% conversion rate to willingness to implement → pursuing those interested is likely to have a high success rate

Promoting Enterprise as an offer from TfL is a motivating way to sell the scheme in to SMEs
Level of appeal in Enterprise concept

- 2/3 of SMEs would not reject the Enterprise programme
- Revealing TfL as the name behind the initiative **significantly** increases appeal

Source: QF1. How appealing is the Enterprise concept to you and your business? QF7. We’d now like to inform you that the Enterprise scheme is offered by Transport for London as part of their initiative to keep London moving and reduce car travel & congestion in the capital. With this in mind, how appealing is the Enterprise concept to you and your business?

**Net Appeal %**

<table>
<thead>
<tr>
<th>Enterprise offered by TfL</th>
<th>Not at all appealing</th>
<th>Somewhat unappealing</th>
<th>Not sure</th>
<th>Somewhat appealing</th>
<th>Very appealing</th>
<th>Net Appeal %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13%</td>
<td>13%</td>
<td>29%</td>
<td>33%</td>
<td>12%</td>
<td>45%</td>
</tr>
<tr>
<td>Enterprise</td>
<td>23%</td>
<td>10%</td>
<td>34%</td>
<td>24%</td>
<td>9%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Source: QF1. How appealing is the Enterprise concept to you and your business? QF7. We’d now like to inform you that the Enterprise scheme is offered by Transport for London as part of their initiative to keep London moving and reduce car travel & congestion in the capital. With this in mind, how appealing is the Enterprise concept to you and your business?

Base: All respondents (n = 212)
87% of those interested in Enterprise would consider implementing in the future

- Consideration for implementation is divided
  - Though 4-in-10 SMEs are very/somewhat likely to implement

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Likely</td>
<td>9%</td>
</tr>
<tr>
<td>Somewhat Likely</td>
<td>29%</td>
</tr>
<tr>
<td>Not sure</td>
<td>29%</td>
</tr>
<tr>
<td>Somewhat Unlikely</td>
<td>19%</td>
</tr>
<tr>
<td>Not at all Likely</td>
<td>14%</td>
</tr>
</tbody>
</table>

Likely (top 2 box): 38%
Not likely (net): 33%

100-249 employee sized firms are more likely to consider implementing Enterprise (68%)

Those who find Enterprise most appealing and are likely to implement tend to...
- Be a larger SME (100-249 employees)
- Be female
- Be a younger decision-maker (26-35 years)
- Have an environmental policy already in place

Source: QF8. And how likely do you think you would be to consider implementing this scheme in your business in the future?
Base: All respondents (n = 212)
Decision-makers mode of commute does not have an effect on likelihood to implement Enterprise

- Interestingly, a decision-makers mode of commuter transport appears to have an effect on appeal scores.
- However, their personal transport choice has no effect on likelihood to implement the Enterprise scheme.

### Decision-makers

<table>
<thead>
<tr>
<th>Sustainable transport</th>
<th>Not sustainable</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Top 2 box %</strong></td>
<td><strong>Top 2 box %</strong></td>
</tr>
<tr>
<td>Appeal of Enterprise (TfL offer)</td>
<td>53%</td>
</tr>
<tr>
<td>Consideration to implement</td>
<td>39%</td>
</tr>
</tbody>
</table>

Source: QE1. Thinking about a normal day, how do you get to work? QF7. How appealing is the Enterprise concept to you and your business (offered by TfL)? QF8. And how likely do you think you would be to consider implementing this scheme in your business in the future? Base: All respondents (n = 212)
Company size has a significant effect on likelihood to increase uptake and implementation

- Larger SMEs are significantly more likely to find Enterprise appealing and implement the scheme in future with highest conversion ratios
  - Higher likelihood of staff uptake and administrative support both drive this

- For the smallest SMEs, Enterprise offered by TfL significantly increases appeal of the scheme
  - Adds credibility and accessibility benefits to the scheme

### Company size

<table>
<thead>
<tr>
<th>Company size</th>
<th>20-49 employees</th>
<th>50-99 employees</th>
<th>100-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appeal of Enterprise</td>
<td>26%</td>
<td>32%</td>
<td>63%</td>
</tr>
<tr>
<td>Appeal of Enterprise (TfL offer)</td>
<td>41%</td>
<td>39%</td>
<td>69%</td>
</tr>
<tr>
<td>Difference</td>
<td>+15</td>
<td>+7</td>
<td>6+</td>
</tr>
<tr>
<td>Consideration to implement</td>
<td>34%</td>
<td>30%</td>
<td>68%</td>
</tr>
<tr>
<td>Conversion rate (Appeal → Implementation)</td>
<td>83%</td>
<td>77%</td>
<td>99%</td>
</tr>
</tbody>
</table>

Source: QF1. How appealing is the Enterprise concept to you and your business? QF7. How appealing is the Enterprise concept to you and your business (offered by TfL)
QF8. And how likely do you think you would be to consider implementing this scheme in your business in the future?
Base: All respondents (n = 212)
For some smaller companies a more flexible and less formalised approach may be useful

- Whilst many companies could see the benefit in a formalised and structured travel plan, some smaller companies have logistical concerns:
  - All staff would want different packages
  - Not enough staff to maximise benefit
  - A lot of time and effort on the part of a business

- For these companies there may be benefit in offering more informal travel advice and resources with the potential to formalise the offer if they grow:
  - Consultancy and ad hoc services to engage in sustainable travel practices from an early age of the company
  - Potentially a more cost-effective option for Enterprise with regard to smaller companies (~30 employees or less)

- However, even some smaller companies prefer a more formalised approach so this option would be best offered but not stipulated
Segment feelings towards Enterprise: Outer and Security most engaged

Outer Directed

Interest: 46%
Implement: 36%

Reputation benefits:
- Most likely to acknowledge the reputation benefits and feel that taking part in would encourage loyalty amongst their current customers / clients
- Feel corporate schemes fit well with their company ethos and values and project a positive image of their company for PR and marketing purposes

Security Driven

Interest: 51%
Implement: 46%

Cost Savings:
- Most likely to have been thinking about ways to encourage sustainable travel within their business already
- Are interested in cost saving benefits
- Fostering sustainable travel fits with company image, although they acknowledge it may not be appropriate for all employees

Inner Directed

Interest: 37%
Implement: 29%

Fear change / low demand:
- Concerned that sustainable travel not a practical option for employees and not sure that benefits are high enough to justify Enterprise
- Reducing their carbon footprint is not a priority for this group,
- They are wary of unnecessary costs in schemes such as these
Outer Directed
Feelings towards Enterprise

- This group feel positively about the scheme particularly after they learn that Enterprise is offered by TfL
- They feel that reducing their carbon emissions would reduce their costs in the long run
- They are the most likely group to acknowledge the reputation benefits of taking part in the Enterprise scheme and feel that taking part in responsible business practices would encourage loyalty amongst their current customers / clients
- Outer directed individuals feel corporate schemes fit well with their company ethos and values and project a positive image of their company for PR and marketing purposes

46% rate the scheme as appealing
36% are likely to implement it
Security Driven
Feelings towards Enterprise

- This group feel very positively about the scheme particularly after they learn that Enterprise is offered by TfL.
- These individuals are also the most likely to have been thinking about ways to encourage sustainable travel within their business already.
- They tend to agree that fostering sustainable travel fits within their company’s image and ethos and that they ought to do more to encourage sustainable travel amongst their employees.
- However, they do tend to acknowledge that sustainable travel may not be a practical option for at least some of their employees.

51% rate the scheme as appealing
46% are likely to implement it
Inner Directed
Feelings towards Enterprise

- This group are the **least positive** about the scheme of all segments but appeal is **significantly increased** after they learn that Enterprise is offered by TfL.
- They are concerned that **sustainable travel may not be a practical option for their employees** and are **not sure** that the benefits of sustainable travel are high enough to justify implementing the scheme.
- **Reducing their carbon footprint is not a priority for this group**, if they were to take part they would want some kind of **accreditation** for their efforts.
- They feel that corporate schemes of this nature would not be of interest to their employees and **do not fit well with their company vision or ethos**.
- They are wary of **unnecessary costs** in schemes such as these.

37% rate the scheme as appealing
29% are likely to implement it
Segment consideration for Enterprise

- **Outer** – positive attitude but will they just take the idea and run with it?
  - Need to make the Enterprise social kudos, representative and accreditation invaluable so they need to be part of the scheme rather than implement their own iteration

- **Security** – see the appeal in the idea but need to see proven benefits to the business
  - Specify significance of cost benefits and simplicity of implementation and target larger security driven businesses particularly

- **Inner** – appreciate idea but need to see staff demand to implement
  - Need to drive staff demand or identify companies where staff demand already exists and reassure on support and ease of implementation
Triggers and barriers to Enterprise
Cost savings and employee well-being are the most motivating factors

Cost is top of mind for SMEs particularly at this current time

- Cost-saving propositions will always be popular and by the same token, cost concerns will always prevail
  - Resource and associated costs are even more of a concern for smaller SMEs
- However, supporting employees well-being is also a strong motivator - one that can’t be quantified
  - This is a unique benefit that can be leveraged as a key selling point

Added benefit of caring for environment is recognised but not deemed particularly important or motivating for most

- Though not a key selling point, environmental benefits do have their place particularly for motivating those SMEs least likely to implement the Enterprise scheme

By promoting benefits of employee well-being and cost savings, Enterprise is able to appeal to both tangible and intangible ROI
Tangible and intangible benefits are important to Enterprise

Greater productivity
10%

Reducing congestion
7%

Cost savings
25%

Match funding also motivating cost benefit

Healthier workforce
14%

Responsible business practice
8%

New business advantage
2%

Reputation benefits
7%

Protecting the environment
8%

Source: QF3. Which of the potential benefits of the Enterprise scheme is most motivating for you? Please select just one option
Base: All respondents (n = 212)
Match funding is a big hook

- All companies find the match funding highly appealing can see the benefit in infrastructural changes or investment in events

- Funding seen to impress commitment of TfL to the scheme and an investment in the company’s future
  - Differentiates the scheme from other ‘CSR’ schemes which can be demanding of companies time and financial resources

- However, there is fear of making the wrong decision or not making the most of the money on offer. Companies would prefer a more flexible approach to the funding:
  - Ability to use on a number of different initiatives
Benefits directly related to business

- Businesses find the offer appealing primarily due to the benefits it offers to their businesses:
  - Reduced expenditure on business travel
  - Improved efficiency and productivity of staff
  - Happier and more stable employee base

- Secondary benefits lie in the ability to offer staff a benefit at relatively low cost
  - Can be part of the staff ‘benefits’ package offered to staff at low investment to employer
  - Allows companies to ‘badge’ themselves as being part of the scheme and make themselves an attractive employer
  - Offers social benefits in the form of some activities / social events

Unlike many CSR schemes Enterprise is seen to have tangible benefits for businesses
Focussing on business travel as well as staff commute makes the benefits more tangible
Triggers for consideration per segment

Security Driven
Traditionalists

Inner Directed
Pragmatists

Outer Directed
Idealists

**Cost saving**

A healthier & happier workforce

Greater Productivity

Advantage over competition

Responsible business practices

Reputation benefits

Protecting the environment

(a benefit of Enterprise but not a driver to trial)
What are the potential benefits of the Enterprise scheme?

<table>
<thead>
<tr>
<th>Most motivating potential benefits</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost saving</td>
<td>25%</td>
</tr>
<tr>
<td>A happier workforce</td>
<td>16%</td>
</tr>
<tr>
<td>A healthier workforce</td>
<td>14%</td>
</tr>
<tr>
<td>Greater productivity</td>
<td>10%</td>
</tr>
<tr>
<td>Responsible business practice</td>
<td>8%</td>
</tr>
<tr>
<td>Protecting the environment</td>
<td>8%</td>
</tr>
<tr>
<td>Reducing congestion</td>
<td>7%</td>
</tr>
<tr>
<td>Reputation benefits with employees, customers &amp; clients</td>
<td>7%</td>
</tr>
<tr>
<td>Advantage over competition for new business</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

26-35 yo (35%) and Inner London (22%) are more likely to see this as a motivating factor.

Outer London (15%) is more likely to see this as a motivating factor.

Source: QF3. Which of the potential benefits of the Enterprise scheme is most motivating for you? Please select just one option

Base: All respondents (n = 212)
What are the potential benefits of the Enterprise scheme?

- For those least likely to consider implementing the Enterprise scheme, environmental benefits are very motivating
  - As well as those in Outer London
- Interestingly, reputation is less motivating to those least likely to implement

<table>
<thead>
<tr>
<th>Most motivating potential benefits</th>
<th>Implement</th>
<th>Not sure</th>
<th>Not implement</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost saving</td>
<td>22%</td>
<td>32%</td>
<td>22%</td>
<td>25%</td>
</tr>
<tr>
<td>A happier workforce</td>
<td>19%</td>
<td>12%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>A healthier workforce</td>
<td>19%</td>
<td>15%</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>Greater productivity</td>
<td>15%</td>
<td>13%</td>
<td>3%</td>
<td>10%</td>
</tr>
<tr>
<td>Responsible business practice</td>
<td>6%</td>
<td>7%</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Protecting the environment</td>
<td>4%</td>
<td>5%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Reducing congestion</td>
<td>3%</td>
<td>5%</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>Reputation benefits with employees, customers &amp; clients</td>
<td>9%</td>
<td>10%</td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>Advantage over competition for new business</td>
<td>5%</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>2%</td>
<td>9%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: QF3. Which of the potential benefits of the Enterprise scheme is \textit{most} motivating for you? Please select just one option

Base: All respondents (n = 212)
Environment and congestion benefits are most credible, but not necessarily motivating

- Again, protecting the environment is seen as an added benefit by half of SMEs
  - Not a key selling point for all but one that is still seen as valuable

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Top 2 box Agree / Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protecting the environment and reducing carbon footprint</td>
<td>53%</td>
</tr>
<tr>
<td>Reducing congestion in London</td>
<td>50%</td>
</tr>
<tr>
<td>A long-term cost reward</td>
<td>42%</td>
</tr>
<tr>
<td>Greater productivity</td>
<td>42%</td>
</tr>
<tr>
<td>A healthier workforce</td>
<td>41%</td>
</tr>
<tr>
<td>A happier and more cohesive workforce</td>
<td>40%</td>
</tr>
<tr>
<td>Benefit from the reputation Enterprise would give</td>
<td>37%</td>
</tr>
<tr>
<td>Help company when competing for new business tenders</td>
<td>28%</td>
</tr>
</tbody>
</table>

SMEs with 100-249 employees are more likely to find environmental benefits appealing (75%)

Outer London (54%) is more likely to see this benefit from the scheme

Source: QF2. What extent do you agree that introducing a plan for sustainable travel could reap each of the following benefits for your business?
Base: All respondents (n = 212)
The benefits are very appealing but support needed as credibility can be questioned

- Tangibility of both tangible and softer benefits can come into question without data to support claims

- Decision makers ask for evidence and elaboration to be reassured on benefits to them, their staff and their business
  - Case studies and succinct supporting evidence will be useful here
  - Examples that relate benefits to their particular business will strengthen the argument:
    - Location, industry, size, personality, global versus local companies

- Security Driven and Inner Directed particularly cautious without evidence for benefits
  - Current economic climate presents a real opportunity for Enterprise to demonstrate meaningful and tangible benefits through case studies and evidence

Maybe staff would be less happy because you took away their company cars?

How can they prove less sick days?
Reputation benefits require support

- Reputation is a key driver to interest in the Enterprise scheme
  - Companies envision this program to demonstrate good practice and have credibility benefits in travel management
  - Particularly for Outer Directed

- However, for this benefit to be credible, Enterprise would benefit from a reputation or accreditation program
  - Where companies can promote membership and benefits
  - Keen to include information/logo on company website and newsletters

- However, with this benefit can come red tape and whilst accreditation is a potentially valuable asset of Enterprise additional administration/logistical investment is unlikely to be supported
Barriers to Enterprise

Low staff uptake 38%

Staffing requirements 29%

Commitment required 32%

Cost involvement 36%

Unnecessary change 32%

Logistical considerations 29%

Source: QF4. And which of the potential considerations of the scheme are concerning for you? Please select as many as you wish.
Base: All respondents (n = 212)
Barriers to Enterprise

- Smaller SMEs are more concerned with the financial and resource strains Enterprise may place on their businesses.

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low staff uptake</td>
<td>38%</td>
</tr>
<tr>
<td>Cost involvement</td>
<td>36%</td>
</tr>
<tr>
<td>Level of commitment involved</td>
<td>32%</td>
</tr>
<tr>
<td>An unnecessary change</td>
<td>32%</td>
</tr>
<tr>
<td>Logistical considerations</td>
<td>29%</td>
</tr>
<tr>
<td>Additional staff resources</td>
<td>24%</td>
</tr>
<tr>
<td>Public transport services</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

Larger SMEs with 100-249 employees are least likely to be concerned (23%)
Larger SMEs with 100-249 employees are least likely to be concerned (17%)
Larger SMEs with 100-249 employees are more likely to be concerned (20%)

Source: QF4. And which of the potential considerations of the scheme are concerning for you? Please select as many as you wish.
Base: All respondents (n = 212)
What are the potential barriers to the Enterprise scheme?

- Those most interested in implementing Enterprise are less concerned with staff uptake
  - Most likely to be larger SMEs with a larger workforce
  - Believe that staff would want the package
- Those unsure as to whether they would consider implementing Enterprise in the future are most concerned with associated costs
- Those least likely to implement are mainly focused on implementing an unnecessary change

<table>
<thead>
<tr>
<th>Barriers</th>
<th>Implement</th>
<th>Not sure</th>
<th>Not implement</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low staff uptake</td>
<td>26%</td>
<td>48%</td>
<td>43%</td>
<td>38%</td>
</tr>
<tr>
<td>Cost involvement</td>
<td>37%</td>
<td>44%</td>
<td>27%</td>
<td>36%</td>
</tr>
<tr>
<td>Level of commitment involved</td>
<td>33%</td>
<td>28%</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>An unnecessary change</td>
<td>20%</td>
<td>25%</td>
<td>53%</td>
<td>32%</td>
</tr>
<tr>
<td>Logistical considerations</td>
<td>30%</td>
<td>23%</td>
<td>31%</td>
<td>29%</td>
</tr>
<tr>
<td>Additional staff resources required</td>
<td>24%</td>
<td>22%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Public transport services making money</td>
<td>12%</td>
<td>7%</td>
<td>0%</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>0%</td>
<td>9%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: QF4. And which of the potential considerations of the scheme are concerning for you? Please select as many as you wish.
Base: All respondents (n = 212)
Barriers to consideration per segment

Security Driven Traditionalists
- An unnecessary change
- Public transport services making money

Inner Directed Pragmatists
- Any cost involved
- Logistics
- Level of commitment
- Low staff uptake

Outer Directed Idealists
- Additional staff resource
- Any cost involved
- Level of commitment
- Logistics

Additional staff resource
- Any cost involved
- Level of commitment
- Logistics

Low staff uptake
- Additional staff resource
- Any cost involved
- Level of commitment
- Logistics

An unnecessary change
- Security Driven Traditionalists
- Public transport services making money
Resolving barriers with motivators

- **Barrier**
  - Drain on resources
  - Cost to employer
  - Low staff demand / uptake
  - Duration of support

- **Resolution**
  - Support from personal representative
  - Focus on cost benefits and match funding of the scheme, iterate it need not cost the employer
  - Demonstrate staff demand
  - Inner Directed – ensure there is some in company demand before engaging
  - Reassure that it is an ongoing relationship that will be reviewed in full after 5 years
Some concerns can be addressed through language used to describe the scheme

- Some language (particularly used in the first stage of qualitative research) can make businesses more wary of involvement and should be avoided:
  - Process words not well received as they infer effort on the part of the business: audit, survey, assessment
  - Marketing speak words can be ambiguous and can prompt some cynicism – merchandise, marketing tools, ‘pal’ schemes, ‘Enterprise’ or ‘SME’

- Words that focus on benefits of the scheme can provide reassurance:
  - Support, advice tailored to business needs, business practice analysis, promotional tools and support, innovative recommendations, London business travel package

**Focus on benefits and outcomes for business rather than effort and logistics of the scheme**
A long-term relationship can be both an asset and a draw-back

The representative is seen to offer flexible, personal and tailor made support:
- Expert advice on travel and business practices
- Regular updates on local activities / initiatives
- Review of progress and fine-tuning of travel plan

- On the one hand a 5 year commitment is arguably too short:
  - Travel is an ongoing cost, commitment and consideration for a business
  - There may be some concern over support ending at 5 years

- On the other, 5 years feels too long:
  - For some businesses, 5 years feels like an unreasonably long commitment
  - A 1-3 year review, implementation and support plan seems more intuitive for a short term plan

An ongoing relationship is beneficial but emphasis should be on specialist review offering tailored advice and ongoing support with less emphasis on 5 year commitment / cut-off point
Enterprise initiatives in detail
An overview of the program

- Initiatives are on the whole well received by respondents
  - Higher level of appeal than for the package overall
  - Clear and simple steps towards improving travel practices
  - Match funding is a significant hook for appeal

- However, many of the initiatives are felt to be already in place and the point of difference may need to be in the whole package/image of Enterprise

- The package can seem overly prescriptive
  - Businesses require a degree of choice – want to pick and choose rather than buy into a specific ‘modal package’
  - Businesses want the matched funding – iterating Enterprise will do everything you can to help them benefit will be well received
  - Reassure on high level of support on offer and low effort/investment from companies
Which Enterprise package appeals most?

- Cycling and public transport are most appealing Enterprise packages at an overall level.

<table>
<thead>
<tr>
<th>Package</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cycling</td>
<td>70%</td>
</tr>
<tr>
<td>Public transport</td>
<td>69%</td>
</tr>
<tr>
<td>Walking</td>
<td>49%</td>
</tr>
<tr>
<td>Car share</td>
<td>41%</td>
</tr>
<tr>
<td>Smarter working</td>
<td>39%</td>
</tr>
</tbody>
</table>

Less appealing to SMEs with 100-249 employees (50%)
Particularly appeals to SMEs with 50-99 employees (81%)
Particularly appeals to SMEs with 50-99 employees (71%)

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these appeal to you? Please select as many as you wish. Base: All respondents (n = 212)
Top 10 Initiatives

1. Pool oyster card information
2. Public transport information circulation
3. Tax break bicycle leasing schemes
4. Interest free loan schemes for annual travel passes
5. Cycle maps
6. Walking maps
7. Cycling related merchandise
8. Cycle training, bike maintenance workshops
9. Free company registration on Liftshare website to encourage carsharing
10. Public transport related merchandise
10. Smarter working package

Most appealing are relatively easy to implement and information or employee benefit based

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these appeal to you? Please select as many as you wish. Base: All respondents keen to implement (n = 81)
Tailoring the package to suit segments

- **Outer – like the idea of new and innovative travel ideas**
  - Presenting ideas as ahead of the curve and innovative approaches to travel management for businesses in London

- **Security – want high reward, low cost investments**
  - Most interested in initiatives that require less effort and investment from the business

- **Inner – interested in packages that deliver to staff need and improve business practices**
  - Understand the initiatives demanded by staff and offer logistical advice on the day-to-day efficient running of the package
Which Enterprise initiatives appeal to you?

- No significant differences between the segments on types of initiatives that appeal according to mode of transport or commitment level.
- However, Outer Directed seem to be less in favour of car sharing (likely due to inner London skew and lower car usage) and the Security Driven prefer lower commitment changes.

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Outer Directed Idealists</th>
<th>Security Driven Traditionalists</th>
<th>Inner Directed Pragmatists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cycling Initiatives</td>
<td>77%</td>
<td>66%</td>
<td>68%</td>
</tr>
<tr>
<td>Public Transport Initiatives</td>
<td>69%</td>
<td>74%</td>
<td>62%</td>
</tr>
<tr>
<td>Smarter working Initiatives</td>
<td>28%</td>
<td>24%</td>
<td>30%</td>
</tr>
<tr>
<td>Walking Initiatives</td>
<td>49%</td>
<td>53%</td>
<td>44%</td>
</tr>
<tr>
<td>Car Share Initiatives</td>
<td>30%</td>
<td>41%</td>
<td>48%</td>
</tr>
</tbody>
</table>

**Rank of Commitment Levels**

<table>
<thead>
<tr>
<th>Commitment Level</th>
<th>Outer Directed Idealists</th>
<th>Security Driven Traditionalists</th>
<th>Inner Directed Pragmatists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Commitment</td>
<td>68%</td>
<td>82%</td>
<td>69%</td>
</tr>
<tr>
<td>Medium Commitment</td>
<td>81%</td>
<td>81%</td>
<td>71%</td>
</tr>
<tr>
<td>High Commitment</td>
<td>51%</td>
<td>40%</td>
<td>48%</td>
</tr>
</tbody>
</table>

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these appeal to you? Please select as many as you wish.

Base: All respondents (n = 212)
Which Enterprise initiatives are most appealing?

- Large SMEs find these schemes less appealing
  - However, importantly, this is because they tend to already have many of these initiatives in place

### Top 10 Most Appealing Enterprise Initiatives

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Company size 20-49</th>
<th>Company size 50-99</th>
<th>Company size 100-249</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pool oyster card information</td>
<td>53%</td>
<td>58%</td>
<td>40%</td>
</tr>
<tr>
<td>Interest free loan schemes for annual travel passes</td>
<td>47%</td>
<td>54%</td>
<td>27%</td>
</tr>
<tr>
<td>Public transport information circulation</td>
<td>45%</td>
<td>49%</td>
<td>35%</td>
</tr>
<tr>
<td>Tax break bicycle leasing schemes</td>
<td>42%</td>
<td>56%</td>
<td>22%</td>
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<tr>
<td>Cycle maps</td>
<td>38%</td>
<td>52%</td>
<td>31%</td>
</tr>
<tr>
<td>Smarter working package</td>
<td>41%</td>
<td>34%</td>
<td>34%</td>
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<tr>
<td>Walking maps</td>
<td>34%</td>
<td>51%</td>
<td>28%</td>
</tr>
<tr>
<td>Bike rack / stands schemes</td>
<td>33%</td>
<td>54%</td>
<td>18%</td>
</tr>
<tr>
<td>Free Registration on Liftshare website to encourage carsharing</td>
<td>34%</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>Cycling related merchandise</td>
<td>34%</td>
<td>42%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these appeal to you? Please select as many as you wish.

Base: All respondents (n = 212)
Pool Oyster cards have high appeal

- The promotion of pool Oyster cards holds real appeal for most companies
  - Seen as a new and different offer from TfL exclusive to businesses
  - Company account would be easier to administrate and supports staff
  - Would increase ease with which employees can use public transport

- Pooling of information has benefits and drawbacks:
  - Easy to manage company expenditure and travel behaviours
  - Can seem big-brother like in it’s use:
    - ‘You’d be able to see what time they arrived and left their sales call and see which staff were being most efficient’
Cycling initiatives are welcomed

- Seen to be a common employee demand as many companies are already being asked for these resources / options for employees
  - However, active promotion of cycling within companies is rare

- Cycling schemes combine benefits of salary ‘perks’, information and wellbeing / happiness of employees.

- But there are often barriers to ‘cycling’ at work:
  - Not enough facilities – parking particularly
  - Concern over safety – ‘if someone got injured you’d have to stop the scheme’
  - Turning up to meetings sweaty!

- Teaming up with boroughs to provide local cycle facilities rather than local gyms is seen as the most beneficial way to encourage cycling

- Pool bikes seems appealing and of interest to many companies as it facilitates employees to be ‘part time’ cyclists and can be seen as a free perk
Public Transport initiatives are keenly received

- Companies very interested in travel loans as they are seen to offer a staff perk and encourage sustainable travel behaviours.

- Information has multiple purposes and is also keenly received by most:
  - Travel information for employees and clients
  - Links on websites

- Some are already aware of information that is out there (Outer Directed particularly) and therefore less interested in ‘basic’ offers but feel that the package could put businesses in touch with TfL for new and improved information as it develops.
Walking initiatives can engage business with local area

- Social and health benefits of walking are engaging for most employers

- However, there is currently low promotion of walking
  - Logistically it can be hard to imagine staff commuting
  - For meetings concerns over time prevail

- There is potential to promote, particularly for work day meetings
  - Maps in office and education on time taken for short distances would be helpful

- Information on walking is low cost, easy to disseminate and motivating
  - On website (links e.g. Walkit.com)
  - On walls (interesting maps concentric on the office – Legible London)
  - Encourage staff social and health activities at lunch time
Flexible working in line with current trends

- In line with trend towards current management style of more flexible working

- Companies divide into two groups:
  - Those who can employ flexible working tactics – and already do
  - Companies who require staff for certain shifts / office hours and therefore cannot encourage home working or flexible hours

- Whilst it seems important that Enterprise representatives are aware of this element of the package it will not be a core area for promotion
Ideas of ‘shared travel’ not popular

- Ideas referencing car sharing / walking pal / cycling pal etc not well received
  - Commuting is appreciated for it’s down time – to wake up or switch off
  - Busy and stressful at the best of times it is not an experience people desire to share
  - Employers claim staff who live near each other will already be doing this if they want to
  - Feels too ‘meddling’ in staff business (particularly for Inner Directed)

- Car sharing can have some initial benefits in terms of convenience and cost saving but also throws up some barriers on further contemplation
  - Will people really leave / start at the same time / may be inconvenient for the driver

- However, these schemes are seen to have safety benefits
  - Particularly in outer London businesses this can be a barrier to sustainable travel
  - Representatives positioning these ideas for safety benefits when raised as a barrier would be useful
Some resistance to merchandise

- There seems to be lower interest overall in merchandise
  - Backlash against too many ‘freebies’ from suppliers
  - Seen to just clutter office and is potentially not very useful

- However, free travel tools can useful and engaging for staff
  - e.g. maps, good quality golf umbrellas, pedometers / cycle computers for competitions, mobile apps, GPS
  - Shared branding also appealing for some businesses (particularly Outer Directed)

- "I don’t think we’d need raincoats – they’d just remind people why you don’t walk"
  Inner Directed

- “Water bottles would be used once and then get ditched – it’s not a major selling point"
  Security Driven

- “We could share branding and offer it to clients that would be good”
  Outer Directed
Which Enterprise initiatives are least appealing?

- Smaller SMEs (20-49 employees) more likely to find these initiatives unappealing
- Initiatives with social-focused elements and merchandise are least appealing

### Top 10 Enterprise Initiatives That Do Not Appeal

<table>
<thead>
<tr>
<th>Initiative</th>
<th>20-49</th>
<th>50-99</th>
<th>100-249</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pedal pal schemes</td>
<td>77%</td>
<td>78%</td>
<td>61%</td>
</tr>
<tr>
<td>Walking events</td>
<td>75%</td>
<td>68%</td>
<td>52%</td>
</tr>
<tr>
<td>Walking pal schemes</td>
<td>75%</td>
<td>68%</td>
<td>49%</td>
</tr>
<tr>
<td>Pooled bike discounts (shared company bikes)</td>
<td>71%</td>
<td>64%</td>
<td>53%</td>
</tr>
<tr>
<td>Bicycle user group</td>
<td>73%</td>
<td>57%</td>
<td>48%</td>
</tr>
<tr>
<td>Carsharing Merchandise</td>
<td>69%</td>
<td>70%</td>
<td>43%</td>
</tr>
<tr>
<td>Walking related merchandise</td>
<td>67%</td>
<td>55%</td>
<td>50%</td>
</tr>
<tr>
<td>Public transport pal scheme</td>
<td>62%</td>
<td>61%</td>
<td>56%</td>
</tr>
<tr>
<td>Cycle training, bike maintenance workshops</td>
<td>66%</td>
<td>61%</td>
<td>40%</td>
</tr>
<tr>
<td>Cycling related merchandise</td>
<td>64%</td>
<td>50%</td>
<td>58%</td>
</tr>
</tbody>
</table>

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these do not appeal to you? Please select as many as you wish. Base: All respondents (n = 212)
Which Enterprise initiatives are least appealing among those interested in taking up the scheme?

- Pairing up schemes and social events have the least appeal

### Top 10 Enterprise Initiatives That Do Not Appeal

<table>
<thead>
<tr>
<th>Initiative</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pedal pal schemes</td>
<td>65</td>
</tr>
<tr>
<td>Walking pal schemes</td>
<td>57</td>
</tr>
<tr>
<td>Bicycle user group</td>
<td>57</td>
</tr>
<tr>
<td>Walking events</td>
<td>53</td>
</tr>
<tr>
<td>Pooled bike discounts (shared company bikes)</td>
<td>52</td>
</tr>
<tr>
<td>Car-sharing Merchandise</td>
<td>48</td>
</tr>
<tr>
<td>Cycle to work day</td>
<td>47</td>
</tr>
<tr>
<td>Cycling related merchandise</td>
<td>44</td>
</tr>
<tr>
<td>Cycle training, bike maintenance workshops</td>
<td>44</td>
</tr>
<tr>
<td>Public transport pal scheme</td>
<td>44</td>
</tr>
</tbody>
</table>

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these do not appeal to you? Please select as many as you wish.

Base: All respondents keen to implement (n = 81)
Tailoring initiatives across modes would promote broader appeal of Enterprise amongst SMEs and increase uptake by employees

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these appeal to you? Please select as many as you wish.

Base: All respondents (n = 212)
## Initiative areas in detail

<table>
<thead>
<tr>
<th>Cost savings / discount</th>
<th>Information</th>
<th>Merchandise</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>70%</strong></td>
<td><strong>68%</strong></td>
<td><strong>55%</strong></td>
</tr>
<tr>
<td>- Tax break bicycle leasing schemes (e.g. interest free loans for bike purchase, discounted bike accessories)</td>
<td>- Walking maps (e.g. available on website or on server etc)</td>
<td>- Walking related merchandise (e.g. raincoats, pedometer, rucksacks, umbrellas)</td>
</tr>
<tr>
<td>- Interest free loan schemes for annual travel passes</td>
<td>- Cycle maps (e.g. on website or server)</td>
<td>- Cycling related merchandise (e.g. puncture repair kits, rucksacks, towels)</td>
</tr>
<tr>
<td>- Pool oyster card information (central database for all oystercard journeys made by employees for work purposes to save money on travelcards)</td>
<td>- Public transport information circulation (e.g. intranet or website info, noticeboard, leaflets, Journey Planner link on website)</td>
<td>- Public transport related merchandise (e.g. oyster card holders, water bottles)</td>
</tr>
<tr>
<td></td>
<td>- Free Registration on Liftshare website for your company to encourage carsharing</td>
<td>- Carsharing Merchandise (cd pouches, tax discs, key rings, maglites…)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Events / workshops</th>
<th>Sharing / social</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>52%</strong></td>
<td><strong>52%</strong></td>
<td><strong>40%</strong></td>
</tr>
<tr>
<td>- Bike rack / stands schemes (e.g. discounts)</td>
<td>- Walking events (e.g. walk to work day)</td>
<td>- Walking pal schemes (e.g. pairing up employees who live near each other to walk to work together)</td>
</tr>
<tr>
<td>- Pooled bike discounts (shared company bikes)</td>
<td>- Bicycle user group (series of meetings &amp; events for cyclists)</td>
<td>- Pedal pal schemes (e.g. pairing up employees who live near each other to cycle in to work together)</td>
</tr>
<tr>
<td>- Shower and changing facilities</td>
<td>- Cycle to work day</td>
<td>- Public transport pal scheme (e.g. pairing up employees who live near each other to travel in to work by public transport together)</td>
</tr>
</tbody>
</table>
Understanding initiative areas

Cost savings / discount
- Biggest motivator yet biggest concern for businesses – will they have to make outlays?
- Proving ROI important for enterprise
- Match funding should be strongly promoted
- Interest free loan schemes for annual travel passes, Tax break bicycle leasing schemes are most appealing
- Draw attention to annual expenditure on travel
- 70%

Information
- High appeal
- Less resource/cost heavy
- Easy to implement
- Pool Oyster, public transport information and cycle and walking maps are seen to be most useful
- Information for people visiting offices can also be promoted
- 68%

Merchandise
- Less motivating
- Relevant items such as cycling gear would be more appropriate
- Co-branded items could also be motivating – advertising and recognition benefits
- 55%

Facilities
- Disruption to business / time and investment required
- Infrastructure / facilities would be more useful in their local area than in office much of the time
- Small, less costly items that can easily be moved to other locations are more appealing e.g. bike racks/stands
- Infrastructure concerns - 7-in-10 SMEs rent their offices
- 52%

Events / workshops
- Not as motivating
- Some concern that these will be time drains on the business and require support
- Similar to sharing/social feel that these may be counter to the culture of the business
- More positive amongst Outer Directed segment
- Can be built into the offer moving forward once a relationship has been built and as an ongoing motivator for the initiative
- 52%

Sharing / social
- Travel is often a solitary behaviour and there is resistance to engaging in more social activities
- May be appropriate for businesses where staff attendance or safety is of concern
- 40%

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these appeal to you? Please select as many as you wish.

Base: All respondents (n = 212)
Appeal of initiatives in line with segment attitudes

- Outer Directed Idealists
- Inner Directed Pragmatists
- Events / Workshops
- Merchandise
- Security Driven Traditionalists
- Facilities
- Information sharing
- Smarter working
- Savings & Discounts
- Sharing / Social
Which Enterprise initiatives appeal to you?

- When grouping initiatives under type, Savings & Discounts and Sharing & Social initiatives are equally appealing to all.
- Security Driven Traditionalists were keener on Information Sharing and Merchandise whilst Outer Directed Idealists were more driven by Facilities and Events & Workshop Initiatives.

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Outer Directed Idealists</th>
<th>Security Driven Traditionalists</th>
<th>Inner Directed Pragmatists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information Sharing Initiatives</td>
<td>63%</td>
<td>73%</td>
<td>65%</td>
</tr>
<tr>
<td>Sharing / Social Initiatives</td>
<td>40%</td>
<td>42%</td>
<td>34%</td>
</tr>
<tr>
<td>Merchandise Initiatives</td>
<td>51%</td>
<td>59%</td>
<td>55%</td>
</tr>
<tr>
<td>Facilities Initiatives</td>
<td>59%</td>
<td>47%</td>
<td>55%</td>
</tr>
<tr>
<td>Savings &amp; Discount Initiatives</td>
<td>69%</td>
<td>73%</td>
<td>67%</td>
</tr>
<tr>
<td>Event &amp; Workshop Initiatives</td>
<td>62%</td>
<td>50%</td>
<td>47%</td>
</tr>
<tr>
<td>Smarter working Initiatives</td>
<td>36%</td>
<td>38%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Source: QF9. Here is an example list of the kind of changes or initiatives that are on offer through the Enterprise scheme. Which of these appeal to you? Please select as many as you wish.

Base: All respondents (n = 212)
Overview summary and recommendations
Overview:
Summary and recommendations

- Most companies do not currently have formalised travel policies but there is a good level of interest in Enterprise overall, heightened when endorsed by TfL (45% interested, 38% would implement)
  - Highest level of interest from larger companies who can see the benefits being applicable across a much higher proportion of staff and find the logistics / investment required less off-putting
  - **Enterprise would benefit from targeting larger companies first and foremost**

- Some key hooks drive interest - cost savings, employee well-being, optional accreditation and company reputation
  - **These benefits should be heavily promoted along with succinct supporting evidence and targeted case studies**

- Research confirmed and developed the business segmentation: Outer Directed Idealists (26%), Inner Directed Pragmatists (31%), Security Driven Traditionalists (43%)
  - **Two main targets for Enterprise – Outer Directed and Security Driven.**
  - **Inner Directed, seem a harder sell in the current climate and would respond to employee demand rather than seek out the scheme themselves**
Engaging the segments, a summary

<table>
<thead>
<tr>
<th>Segment</th>
<th>Profile:</th>
<th>Interest in Enterprise:</th>
<th>Motivations to leverage:</th>
<th>Barriers to overcome:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outer Directed Idealists 26%</strong></td>
<td>Confident, innovative and future focussed businesses</td>
<td>High</td>
<td>Cost savings and staff wellbeing</td>
<td>Need to see benefit in formalised scheme → Offer accreditation / logo &amp; emphasise role of the representative</td>
</tr>
<tr>
<td><strong>Security Driven Traditionalists 43%</strong></td>
<td>Traditional, hierarchical, conservative businesses</td>
<td>High</td>
<td>Cost savings and a ‘free’ benefit to offer staff</td>
<td>Can be critical of ‘soft’ benefits - need to prove the benefits (tangible evidence / case studies) and ensure the program meets expectations</td>
</tr>
<tr>
<td><strong>Inner Directed Pragmatists 31%</strong></td>
<td>Confident, innovative and future focussed businesses</td>
<td>Low</td>
<td>Meeting staff demand, ease of implementation and dedicated support from representative</td>
<td>May not believe staff need / want Enterprise – access companies where staff demand exists or engage with staff before business leader</td>
</tr>
</tbody>
</table>
Taking the Segmentation Forward
Recommended targeting approach

Target: Outer Directed Idealists

Opportunity: Security Driven Traditionalists

Challenge: Inner Directed Pragmatists
Outer Directed Communications strategy

**Where to find them**
- They are more likely than average to work in Advertising & Marketing, Publishing, Printing & Media, and Insurance / Legal services
- These companies will be actively promoting their brand and appearing in industry press

**How to speak to them - triggers**
- Focus on their brand and vision for the company is paramount – stroking egos will be beneficial
- Reputation benefits should be communicated
  This group are also motivated by a happy workforce.
- However, the key decision maker in the business will be most critical to get buy in

**What issues to address – barriers**
- Promotion of reputation & competitive benefits will help overcome concerns about level of commitment involved, low staff uptake and logistical considerations.
### Security Driven Communications strategy

#### Where to find them
- They are likely to work in **Construction, Transport, Banking / Mortgage / Finance and Publishing / Printing & Media**
- 20% have 100+ employees
- This group are the most likely to subscribe to business related magazines and attend conferences

#### How to speak to them - triggers
- Motivating benefits for this group include **cost saving, a healthy & happy workforce and greater productivity**.
- Talking numbers and the bottom line will be engaging
- They are the least likely group to be motivated by responsible business practice

#### What issues to address – barriers
- This group are particularly concerned about **any cost that may be involved** in the scheme, **low staff uptake** and an **unnecessary change**
- They will need the Enterprise team to demonstrate that the benefits gained from involvement with the scheme are **enough to justify the effort** involved in implementation
Inner Directed Communications strategy

**Where to find them**
- They are likely to work in Property & business services, IT / Computer or electronic equipment / software, and Insurance / Legal services.
- This group tend to be quite introverted and not actively seeking connections beyond their immediate business world.

**How to speak to them – triggers**
- They are most likely to act once they can see a staff need and benefit, but do not believe this exists.
- At present, therefore this group are almost exclusively motivated by cost saving.
- Other benefits they could recognise but are **not motivating** were protecting the environment and a healthier work force.

**What issues to address – barriers**
- As key decision makers are not overly motivated Inner Directed companies should be approached via employees rather than management.
- This group are particularly concerned about the **level of commitment involved, any cost, and additional staff resource** required in implementation of this scheme – reassurance from the representative and
Developing the Enterprise Package
Summary and recommendations
Developing the program

- Response to the package and initiatives was on the whole quite positive
  - The initiatives particularly had high demand and overall interest was increased when offered by TfL
  - The package was seen to directly link back to benefits for the company meaning whilst social benefits are credible benefits of the package, the initiative need not be positioned as a CSR scheme but rather as a company support package
  - The package was seen to offer many benefits, particularly cost savings and employee satisfaction / well-being benefits and these should be promoted to encourage uptake

- There was a good level of interest in many of the different initiatives (particularly cost saving and information elements). However, it was felt that a tailor made approach was most appropriate over and above modal specific packages:
  - Travel can be quite idiosyncratic and personally motivated and it feels most appropriate that businesses can tailor their approach to meet many different staff and business needs
  - Whilst employee commute is still an important part of the package, the findings would suggest that there is benefit in focussing on work-related day-time travel within London also to offer cost saving benefits to businesses

- Accreditation seems to be a potential hook for the program – adding weight and credibility to the scheme and may offer PR opportunities for Enterprise
  - However, for some businesses (particularly smaller) a more flexible and informal approach should be made available
Summary and recommendations
The role of the representative

- The personalised representative support was seen as a benefit of the scheme:
  - An expert who can keep the business up to date with latest developments and approaches to business travel management
  - A constant and ongoing relationship - understands the business needs and challenges
  - A friendly person to chat through new ideas / challenges along the way

- Clearly, this support can be leveraged to instil longevity to the relationship between businesses and Enterprise:
  - Sharing new and interesting information and trends
  - Reviewing implementation of travel initiatives and recommending optimisation / when to start new initiatives
  - Providing reassurance and recognition for participation

- Links with local boroughs were perceived to be very important in the implementation of travel plans, particularly with regard to facilities and increasing the sense of modal shift:
  - Enterprise can play a key role in encouraging sustainable travel infrastructure in local boroughs and linking businesses to councils and other third parties
Summary and recommendations
Enterprise can support company PR

- Reputation and competitive advantage can been seen as key benefits to the Enterprise scheme
  - Outer Directed companies and larger companies particularly keen on the PR benefit of the scheme
  - Communicating participation in the scheme through newsletters, websites and even at networking should be encouraged and supported by Enterprise representatives

- Enterprise’s awareness and visual identity can be leveraged through companies who chose to participate
  - Whilst there was some cynicism towards the value of branded merchandise, companies are very keen on information and promoting their membership
  - This opportunity should be leveraged and there may be potential to develop a set of tools to link Enterprise / TfL on company web information (e.g. http://www.gold.ac.uk/cycling)

- This type of promotion may also be useful in generating new contacts and links through existing participating companies and their broader network of peers / suppliers / fellow companies
Summary and recommendations
Gaining access

- Accessing SMEs and gaining face time is not an easy feat – current financial climes make this even more true
  - Many CSR programs have low awareness / involvement (including Enterprise)
  - Companies can be inherently sceptical of new contacts

- However, there is a key opportunity to leverage existing contacts and grow the network through snowballing:
  - Introduction evenings for friends / suppliers / networks of existing participants
  - A competition for existing participants in the scheme to introduce the most new business to Enterprise

- Some ‘cold calling’ may also be beneficial
  - Looking for companies with high profiles (Outer Directed) in industry press
  - Targeting the larger SMEs in London and making them aware of corporate members

- Promotion of the scheme through media channels may also generate awareness and receptiveness – although a personal contact is most likely to engage businesses to commit to the program
Summary and recommendations
Talking to Businesses

- SMEs do not see themselves as unique or distinct from larger ‘corporate’ companies in London, elements such as attitude to business, personality of business, location, industry and global vs local presence all play a significant role in company identity:
  - The positioning of Enterprise for SMEs versus a separate corporate offer seems artificial and may potentially disengage companies
  - It is however, important to iterate Enterprise’s business credentials and experience working with a whole host of businesses

- When promoting the scheme to businesses it is important to communicate clearly and succinctly:
  - For all segments they want to know quickly and easily the nature of the scheme and its benefits, its relevance to them and what they need to do to participate
Summary and recommendations
Keeping initiatives fresh and up to date

- For long-term satisfaction keeping the initiatives fresh and creative will be helpful....
- Respondents suggested a few:
  - Facilities
    - Help with conference calling facilities
    - Support with bus service for employees for more outer London location
    - Mobile apps such as GPS
  - Internal Communications
    - Company progress / blog on intranet e.g. in combination with pedometers for competitions
    - Facilitate company specific social ideas – e.g. Walking Competition - Treasure hunt
  - Internal logistics
    - Company to give driver small cash incentive to liftshare with other employees – get people to work on time and motivated by incentive
    - Support companies in structuring cycle / walking mileage
  - Events / Support / PR
    - Match finding for charity/fun initiatives could work – e.g. like sponsoring red nose day. TfL half or full match Enterprise memebers.
    - Sign up online to events – role should be for TfL to keep the events in the ‘public’ eye, and making sure the events are fun and raise company profile
    - Competitions in boroughs / industries for the best company – e.g. Cycling / reduction in car usage
Summary and recommendations
Keeping up to date with international trends

Full-service bike station for commuting cyclists

We’ve written about urban bike stations before, and are happy to see the concept popping up in other parts of the world. Spotted in Brisbane: Cycle2City, which claims to be the first full-service facility for bicycle commuters in Australia. Brisbane City Council and Queensland Transport teamed up to fund construction of the facility, which gives cyclists a place to store their bikes and change into business attire.

Since opening last June, Cycle2City has signed up 400 members who have access to secure bike parking, air-conditioned locker rooms, showers, laundry service and free bike maintenance classes at the in-house maintenance and repair workshop. Members are encouraged to commit to using the facilities five days a week (at AUD 120.00 for one month or AUD 660.00 for six months), but three-day-per-week ‘permanent casual’ memberships and daily use options are also available.

Cycle2City is just one element of Brisbane’s commitment to encouraging citizens to replace driving with cycling—the city’s mayor has also announced that AUD 100 million will be spent on new bikeways over the next four years. As the number of cycling commuters grows around the world, so will the need for products and services that help make a smooth transition from four wheels to two. Bike-loving entrepreneurs—get going!

Website: www.cycle2city.com.au
Contact: administration@cycle2city.com.au
Business leader profiles
Decision-maker personality

- Almost all SME DMs claim to be open to new ideas and 9-in-10 claim to have good business sense
  - A good starting place for Enterprise!

<table>
<thead>
<tr>
<th>Top 2 box %</th>
<th>Top 2 box %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open to new ideas</td>
<td>96</td>
</tr>
<tr>
<td>Positive</td>
<td>94</td>
</tr>
<tr>
<td>Approachable</td>
<td>91</td>
</tr>
<tr>
<td>Good business sense</td>
<td>91</td>
</tr>
<tr>
<td>A leader</td>
<td>86</td>
</tr>
<tr>
<td>Ambitious</td>
<td>85</td>
</tr>
<tr>
<td>A good listener</td>
<td>84</td>
</tr>
<tr>
<td>Entrepreneurial</td>
<td>84</td>
</tr>
<tr>
<td>Competitive</td>
<td>84</td>
</tr>
<tr>
<td>Innovative</td>
<td>83</td>
</tr>
<tr>
<td>Caring</td>
<td>82</td>
</tr>
</tbody>
</table>
Company values / ethos

- Honesty, reliability along with competitiveness are the most popular words SMEs associate with their company values/ethos.

<table>
<thead>
<tr>
<th>Value</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Honest</td>
<td>51%</td>
</tr>
<tr>
<td>Reliable</td>
<td>50%</td>
</tr>
<tr>
<td>Competitive</td>
<td>45%</td>
</tr>
<tr>
<td>Innovative</td>
<td>42%</td>
</tr>
<tr>
<td>Entrepreneurial</td>
<td>37%</td>
</tr>
<tr>
<td>Ethical</td>
<td>34%</td>
</tr>
<tr>
<td>Ideas-focused</td>
<td>33%</td>
</tr>
<tr>
<td>Market Leader</td>
<td>32%</td>
</tr>
<tr>
<td>Secure</td>
<td>25%</td>
</tr>
<tr>
<td>Approachable</td>
<td>24%</td>
</tr>
<tr>
<td>Caring</td>
<td>18%</td>
</tr>
<tr>
<td>Socially responsible</td>
<td>14%</td>
</tr>
<tr>
<td>A family / community</td>
<td>14%</td>
</tr>
<tr>
<td>Risk averse</td>
<td>11%</td>
</tr>
<tr>
<td>Environmental</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: QB2. And which of the following words do you associate with your company values or ethos. Please select up to five words.
Base: All respondents (n = 212)
Decision-making style of individual

- Employees satisfaction/well-being plays a large part in half of SMEs decision-making.

1. I am open to listening to new ideas for ways to improve my business but the day to day running of my company and the happiness of employees is my first priority (46% agree, Main DMs more likely to agree than Senior team).
2. I am willing to take risks that others wouldn't in order to make opportunities for my business (27%).
3. Too many businesses make risky financial decisions, I prefer to make changes that increase the security of my business and consolidate what we have (27%).

Source: QC3  Which one of these three statements that relate to making business decisions; which one is the most like you
Base: All respondents (n = 212)
Company focus

Top 2 box Agree / Strongly Agree

- My company is always looking for new ways to grow and expand: 89%
- The future focus of my company involves managing budgets and reducing unnecessary costs: 87%
- My company has a clear vision for the future: 86%

Source: QB1. How much would you agree with the following statements about your company?
Base: All respondents (n = 212)