

TRANSPORT FOR LONDON

RAIL AND UNDERGROUND PANEL

SUBJECT: LONDON UNDERGROUND REPUTATION SURVEY 2009 RESULTS

DATE: 9 FEBRUARY 2009

1 PURPOSE AND DECISION REQUIRED

- 1.1 The purpose of this paper is to summarise the results from London Underground's 2009 Reputation Survey. These results provide an overview of London Underground's reputation amongst key stakeholder groups.
- 1.2 The Rail and Underground Panel is asked to note this paper.

2 BACKGROUND

- 2.1 The London Underground (LU) Reputation Survey has been running since 2003 and is made up of five separate surveys amongst Transport Journalists, Members of Parliament, London Politicians, Business Leaders and Londoners (General Public).
- 2.2 Each individual survey is carried out once a year by MORI, an independent research agency. Transport Journalists are surveyed during the spring and the other four groups during autumn/winter.
- 2.3 Each individual survey methodology and questionnaire is tailored to the particular stakeholder group, though there is a high degree of commonality between each questionnaire. The basic measures of reputation (familiarity, favourability and advocacy) are asked of each group.
- 2.4 LU's key measure of reputation is "net advocacy", which is the proportion of people who speak highly of LU less the proportion who speak critically. The Reputation Survey therefore provides LU with a net advocacy score for each stakeholder group.
- 2.5 To get an overall score for LU, a "weighted net advocacy" score is calculated. This is essentially an average score across the five surveys. Londoners account for 60 per cent of the overall score, with the remaining four groups accounting for 10 per cent each.

3 THE IMPORTANCE OF REPUTATION

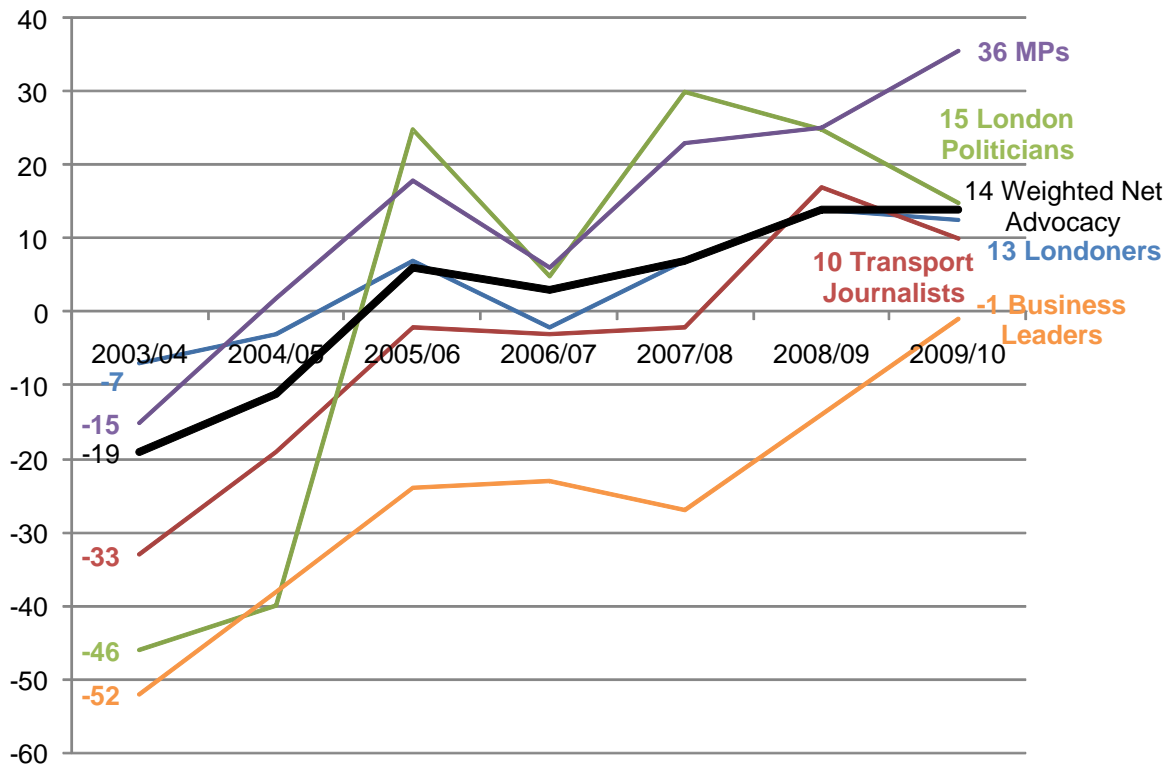
- 3.1 Having a good reputation is very important to LU for a number of reasons. LU's Stakeholder Strategy vision is for LU's stakeholders to support LU publicly. The strategy to achieve this is to convert stakeholders into advocates by informing and engaging with them. LU must demonstrate operating success but at the same time convince stakeholders that sustained investment in LU is a priority.

- 3.2 A good reputation brings many other benefits to LU, particularly as stakeholders feel more goodwill towards LU. This can be invaluable and make people more forgiving during challenging times. Notably, LU's reputation will be very important in 2010 at a time when additional closures are required to complete the delayed Jubilee line upgrade and work starts on the Northern line upgrade.
- 3.3 A good reputation amongst customers also has a beneficial effect on customer satisfaction: if LU has a good reputation customers will be more likely to give LU the "benefit of the doubt" when a journey is disrupted.

4 MAIN FINDINGS FROM LU'S REPUTATION SURVEY 2009

4.1 Figure 1 shows the advocacy trends for each of the groups covered by the surveys over the past seven years. It also shows the Weighted Net Advocacy trend.

Figure 1: Weighted Net Advocacy



Weighted Net Advocacy

- 4.2 Weighted Net Advocacy remained constant at +14. This indicated that overall, despite the enormous pressures on LU's reputation, effective stakeholder engagement coupled with a strong operational performance has kept the balance of opinion in LU's favour.
- 4.3 Closer examination of each stakeholder group, however, reveals that there were some significant shifts in opinion amongst individual groups.

Londoners

- 4.4 Londoners are the most significant driver of the weighted net advocacy score. Net advocacy amongst this group fell slightly from +14 to +13. This stops the growth seen in net advocacy amongst this group in recent years despite the record Customer Satisfaction Survey scores recorded in 2009.
- 4.5 Londoners do acknowledge the improvements in service, awarding LU an average score of 68 out of 100 for their opinion of LU's overall level of service – an all time high score.
- 4.6 The slight fall in advocacy could be a result of the other pressures on LU's reputation described in paragraph 3.2.
- 4.7 Londoners are still supportive of the need for investment. However, the intensity of that feeling has diminished slightly, perhaps due to the recession with the proportion saying it is extremely important to increase the level of investment falling from 37 per cent to 26 per cent.

Transport Journalists

- 4.8 Net advocacy amongst this group fell from +17 in 2008 to +10 in 2009. Despite the real improvements in CSS, fewer transport journalists felt that LU's service had improved this year, which may be a factor in the drop in advocacy.
- 4.9 This group said the biggest weaknesses of LU are the age of the infrastructure and high fares. Engineering works and management of contractors are now also being mentioned as weaknesses.
- 4.10 There is continued support for LU's investment programme, with two thirds of transport journalists saying that LU is extremely or very important to London's economic recovery.

Business Leaders

- 4.11 Business Leaders have traditionally been the most critical of LU and, at the start of 2009, were the only group with negative advocacy. Excellent progress was made with this group in 2009, with net advocacy increasing from -14 to -1. This is the second year in a row that net advocacy has increased by 13 points amongst this group.
- 4.12 Much of this increase is probably due to a perception that LU's service is getting better. The score out of 100 for LU's overall level of service has increased from 49 to 59 in just two years.
- 4.13 In addition, this year both London First and the CBI have shown public support for the line upgrade programme.

London Politicians

- 4.14 The London Politicians survey comprises members of the GLA and London councillors. In 2009 net advocacy dropped by 10 points to +15. Net favourability also dropped significantly.

- 4.15 Good and improving services and the network coverage are seen as the biggest strengths amongst this group. Good and improving services are being mentioned by an increasing number of London Politicians.
- 4.16 Overcrowded and unpleasant journeys, unreliable and disrupted services, and poor customer service were seen as LU's biggest weaknesses. Unreliable and disrupted services are being mentioned by an increasing number of London Politicians.
- 4.17 London Politicians are still supportive of investment in LU – this has not appreciably diminished since 2008. London Politicians feel that investment should be used to improve the quality of journey.

Members of Parliament

- 4.18 Net advocacy amongst Members of Parliament (MPs) increased 11 points to an all time high of +36. This increase was across both Labour and Conservative MPs, increasing to +53 and +12 respectively – all time high scores for both.
- 4.19 Around two thirds of MPs think LU is extremely or very important to London's economic recovery. MPs are still broadly supportive of investment in LU, although the proportion saying it should be increased has fallen from 56 per cent to 52 per cent. Labour MPs are more likely than Conservatives to say investment should be increased.

5 RECOMMENDATION

- 5.1 The Rail and Underground Panel is asked to note this paper.

6 CONTACT

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