TfL 'What We Stand For' Campaign evaluation

Re-investment, Journey Planner and Future Plans
March 2016

TRANSPORT FOR LONDON
EVERY JOURNEY MATTERS

Overview

This research is designed to monitor the recognition and
the impact of TfL's 'What We Stand For' campaign.

Fieldwork took place 10-16th March 2016.

Methodology: Online survey; Approximately 1000 interviews of Londoners aged 16+.

Headlines

Mar-16

- There is a high level of recognition of the WWSF campaign at 41 per cent (i.e. recognition of any ad including 'Re-investment, 'Journey Planner' and 'Future Plans' ads).
  - Good/reasonable levels of recognition achieved by each ad.
  - Generally positive reactions to the ads on ad diagnostics relating to reputation.

- The Re-investment ad comes out strongest in terms of impact on reputation (i.e. performs best on recognition and reputation related ad diagnostics). Followed closely by Journey Planner.

- Exposure to Journey Planner and Northern line ads does appear to have increased awareness of their specific investments. Cycling and Crossrail ads have not.

- Following the recent campaign activity, the downward trend in agreement "TfL reinvest their income to improve their services for customers" appears to have been halted.

1

Recognition

Recognition is highest for the **Reinvestment** ad. Against the benchmarks, recognition of **Reinvestment** and **Journey Planner** ads is 'good', with the 'Future Plan' ads scoring on the borderline of 'good' and 'reasonable'.

% recognise ads – Mar16

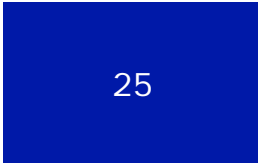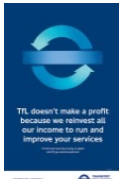| Performance benchmarks	Poster/print recognition
Excellent	30+
Good	20-29
Reasonable	10-19
Poor	0-9

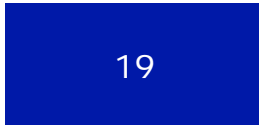**41%** recognise **at least one** of the WWSF ads

41

Total What We Stand For (recognise one or more ads)
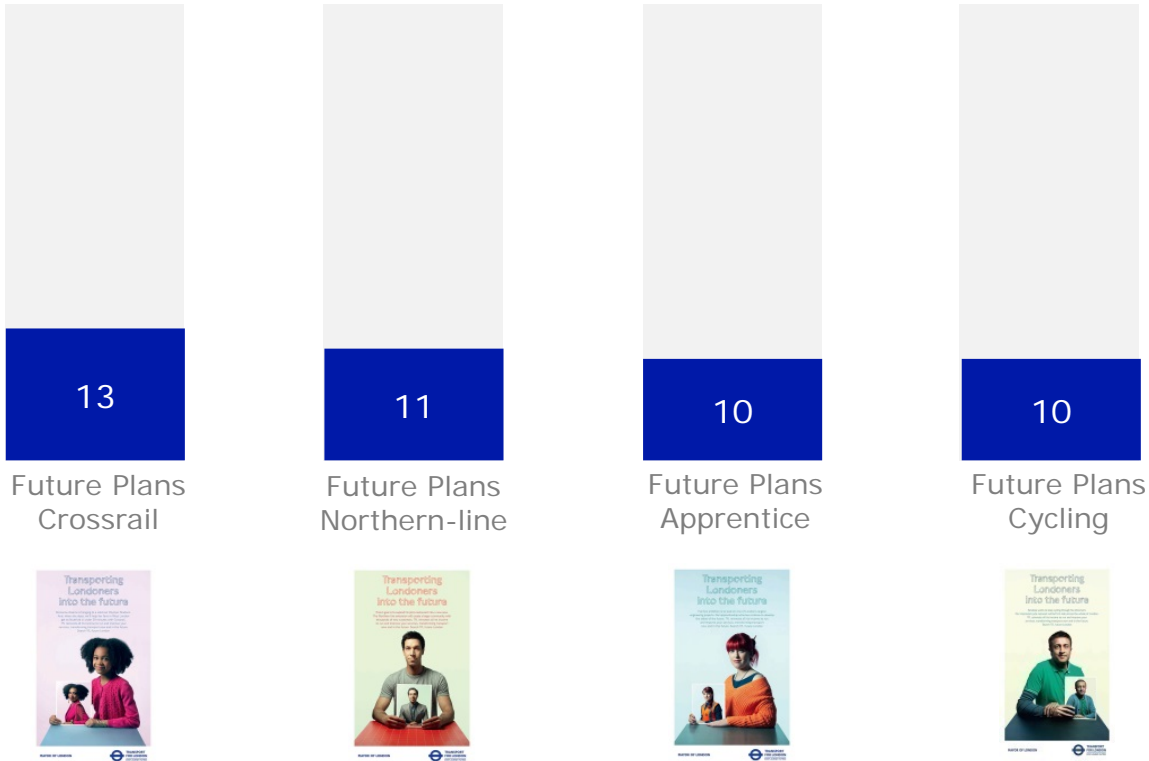
28

TfL Reinvestment

25

TfL Journey Planner

19

TfL Future Plans (one or more ads)

Q4. Have you seen any of these ads before today? Base: Total (907)

5

Most who have seen the Future Plans campaign have seen on average two of the four posters. Recognition of each '**Future Plans**' ad individually, is not especially high.

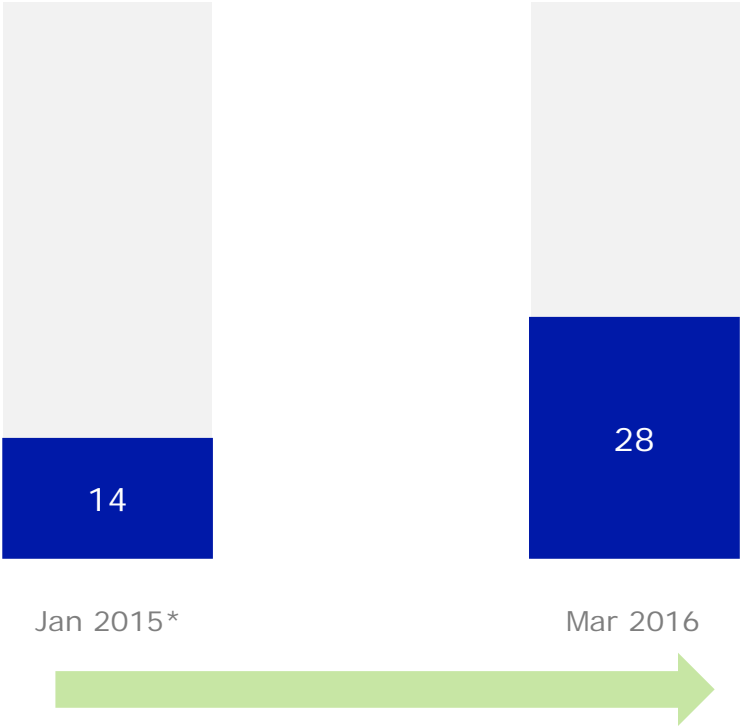% ad recognition – Individual Future Plans ads Mar-16
Av. Poster recognition=2.3

Future Plans
Overall recognition=
19%

Future Plans Crossrail	Future Plans Northern-line	Future Plans Apprentice	Future Plans Cycling
13	11	10	10

There has been an **increase in recognition** of the Reinvestment ad over the past year (doubled over the past year, reflecting the continued support behind the execution).

% ad recognition over time – TfL Reinvestment Ad (Jan 2015 vs. Mar 2016)

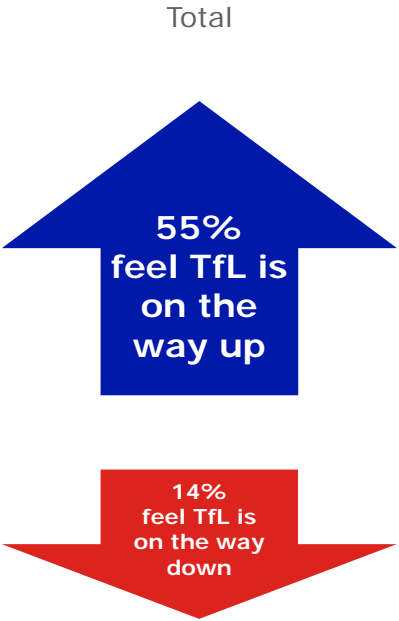**TfL doesn't make a profit because we reinvest all our income to run and improve your services**

To find out how the money is spent visit tfl.gov.uk/reinvestment

MAYOR OF LONDON   TRANSPORT FOR LONDON

28

14

Jan 2015*   Mar 2016

2

TfL Momentum

Perceptions of **TfL being on the way up** is greater among campaign recognisers.

TfL Momentum – Mar16

Total

Campaign Recognisers

Non-recognisers

55% feel TfL is on the way up

14% feel TfL is on the way down

62%

16%

14%

8%

45%

26%

12%

16%
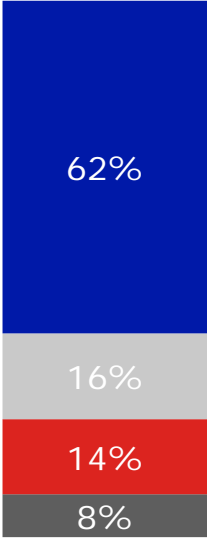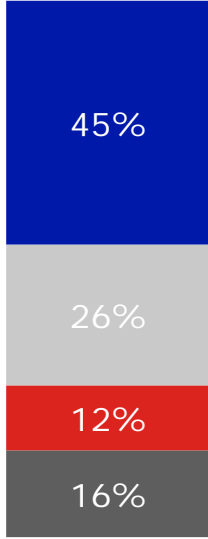
- ■ TfL is on the way up
- ■ TfL not moving
- ■ TfL is on the way down
- ■ Don't know

Q1. Based on your experience and perceptions, which of the following statements best describes Transport for London? Total based on Mar-16 TfL reputation tracker; Campaign recogniser (381), Non Recogniser (526)

9

3

Awareness of TfL Investments

The vast majority of Londoners are aware of at least one or more of TfL's investments.

Number of TfL investments aware of (%)

Prompted list of investments asked; which included a mix of improvements across modes. Refer appendix for full list.

Almost 9 in 10 (87%) are **aware of one or more** TfL investments
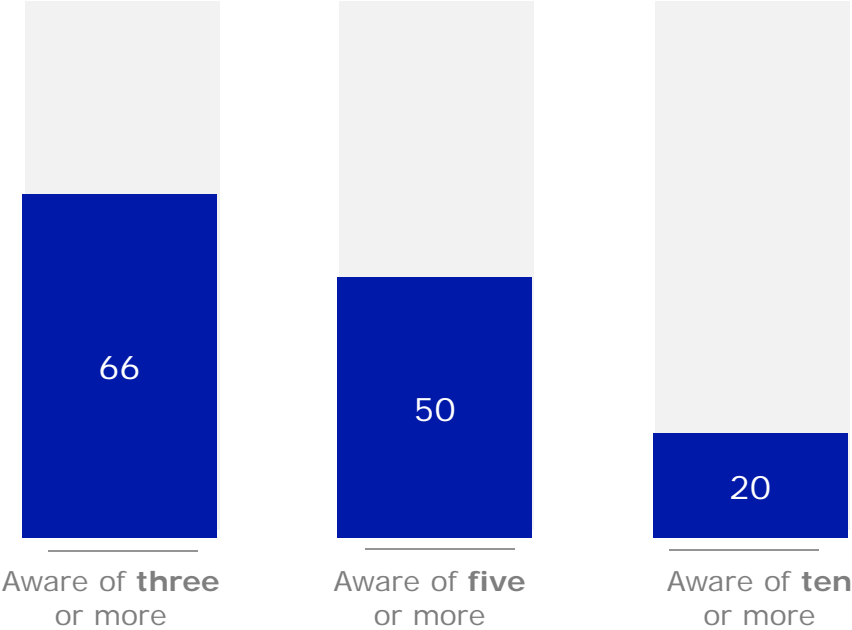
66
Aware of **three** or more

50
Aware of **five** or more

20
Aware of **ten** or more

Q3. Before today, which (if any) of the following Transport for London investments were you aware of? Base: Total (907)

11

Recognisers are **more likely to be aware** of various TfL investments, compared to non recognisers.

Number of TfL investments aware of (%)

▢ Significant difference between recognisers and non recognisers

% aware of TfL investments

Aware of one or more
- Recognisers: **96**
- Non-recognisers: 81

Aware of three or more
- Recognisers: **71**
- Non-recognisers: 63

Aware of five or more
- Recognisers: **52**
- Non-recognisers: 49

Aware of ten or more
- Recognisers: **24**
- Non-recognisers: 17

■ Recognisers

■ Non-recognisers

Prompted list of investments asked; which included a mix of improvements across modes. Refer appendix for full list.
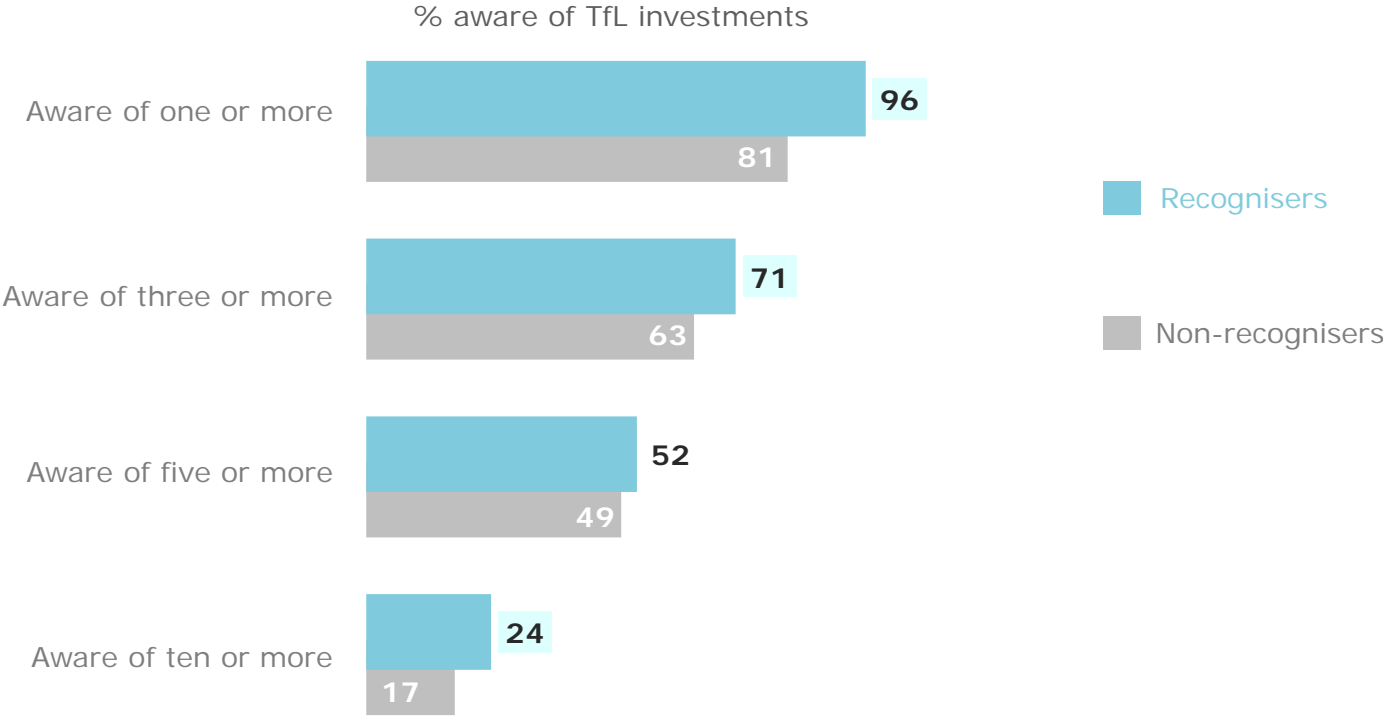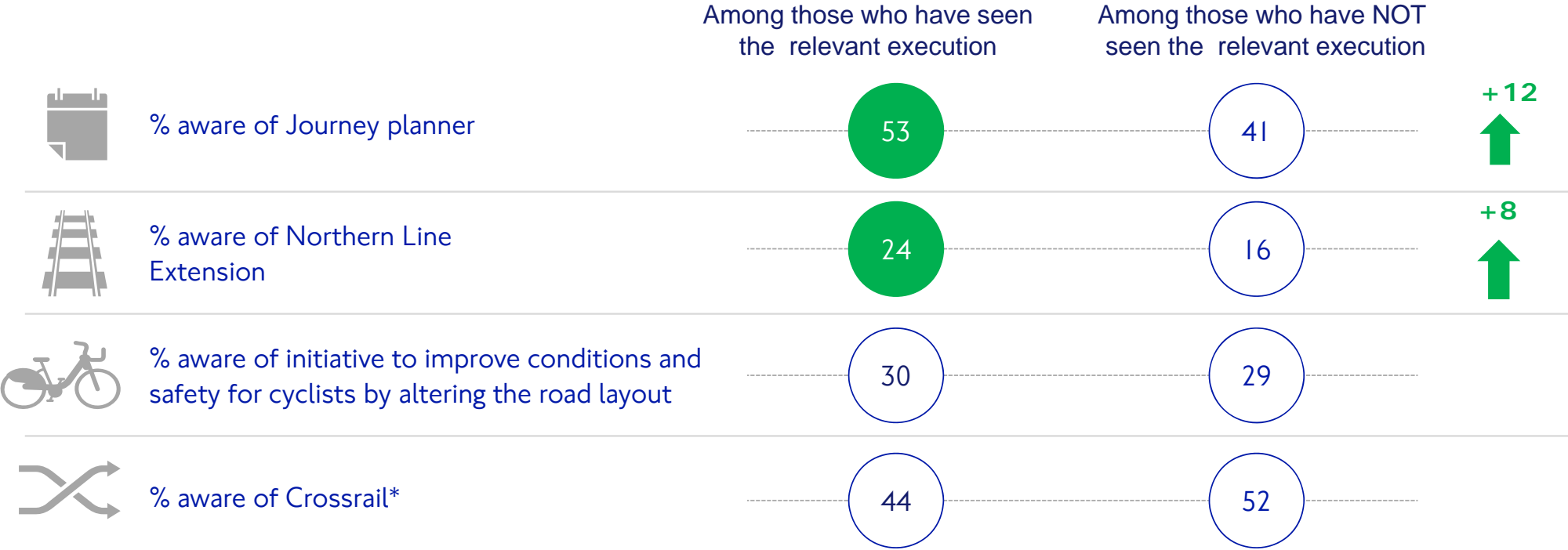Q3. Before today, which (if any) of the following Transport for London investments were you aware of? Base: Campaign recogniser (381), Non Recogniser (526)

Exposure to **Journey Planner** and **Northern line ads** does appear to have increased awareness of their specific investments. Cycling and Crossrail ads have not.

Awareness of the investments communicated by the campaign(s) posters – among those who have seen the related execution

		Among those who have seen the relevant execution	Among those who have NOT seen the relevant execution	
	% aware of Journey planner	53	41	**+12**
	% aware of Northern Line Extension	24	16	**+8**
	% aware of initiative to improve conditions and safety for cyclists by altering the road layout	30	29	
	% aware of Crossrail*	44	52	

From Feb-16 Press/PR communicated the 'Elizabeth Line' (rather than Crossrail).
The Future Plans Crossrail execution referenced Crossrail until March-16 (this was shown to survey respondents).

Q3. Before today, which (if any) of the following Transport for London investments were you aware of?

4

Attitudes towards TfL Investment

Following the recent campaign activity, the downward trend in agreement "**TfL reinvest their income to improve their services for customers"** appears to have been halted.

% agree TfL reinvest their income to improve their services for customers*

Q4 13/14 Mar-14	Q1 14/15 Jun-14	Q2 14/15 Sep-14	Q3 14/15 Dec-14	Q4 14/15 Mar-15	Q1 15/16 Jun-15	Q2 15/16 Sep-15	Q3 15/16 Dec-15	Q4 15/16 Mar-16
51	55	56	59	57	62	59	55	58
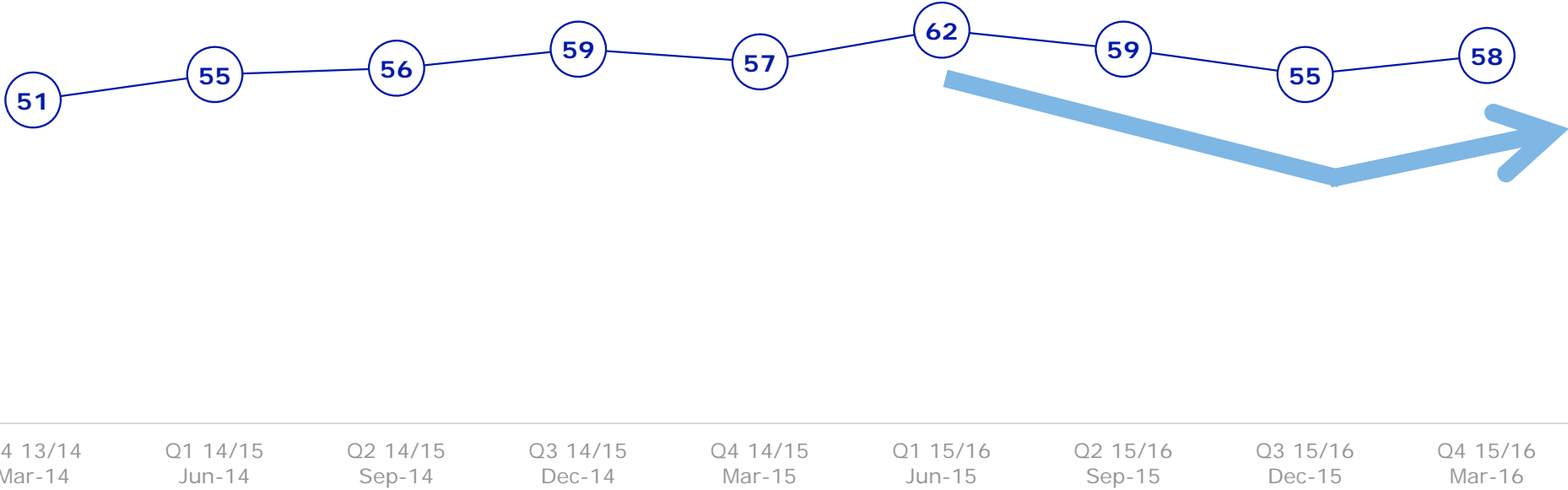
Recognisers are significantly more likely to agree than non recognisers (70% c.f. 43%). *See appendix for detail

5

Ad Diagnostics

The **Reinvestment** ad performs **slightly stronger** on the '**cares about its customers**' ad diagnostic. The four 'Future Plans' ads perform on par with one another.

% agree the campaign makes me feel TfL **cares about its customers**

54	51	50	49	48	47
TfL Reinvestment	TfL Journey Planner	Future Plans Crossrail	Future Plans Northern-line	Future Plans Cycling	Future Plans Apprentice
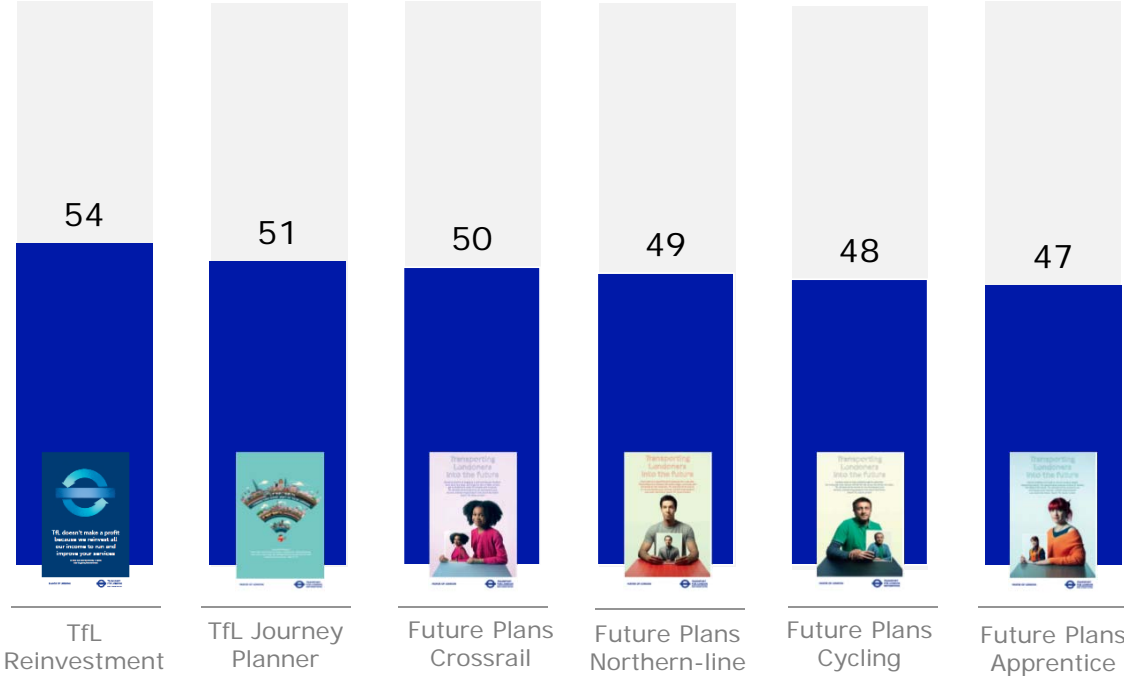
"Strongly agree" is highest for the Re-investment ad at 25% (compared to 16-18% for other ads) *See appendix for detail

Among those who have seen the ads, there are high levels of agreement that the **ads make them feel TfL cares** about its customers. This is **strongest for the Reinvestment ad.**

% agree the campaign makes me feel TfL **cares about its customers by campaign recognition**

Significant difference between recognisers and non recognisers

■ Campaign Recogniser
■ Non Recogniser

	TfL Reinvestment	TfL Journey Planner	Future Plans Crossrail	Future Plans Northern-line	Future Plans Cycling	Future Plans Apprentice
Campaign Recogniser	71	69	66	65	62	62
Non Recogniser	42	39	39	39	38	37
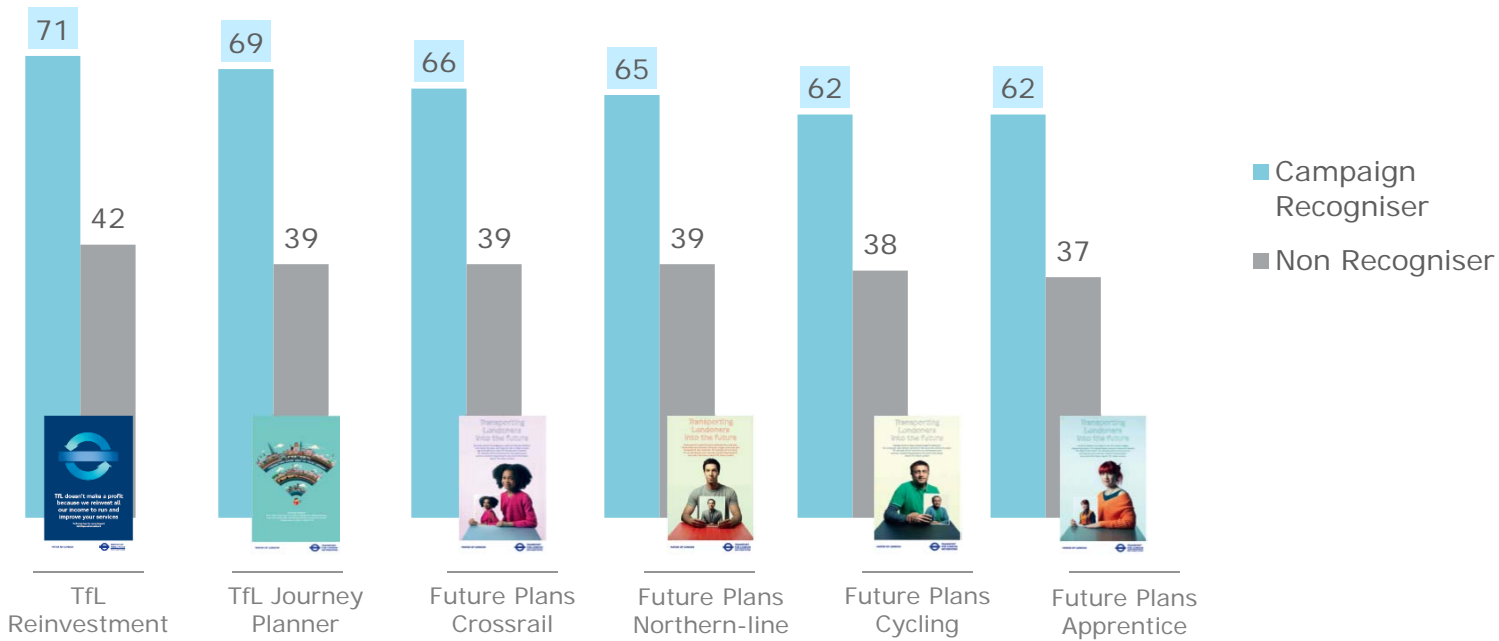
Among those less positive about TfL's momentum (i.e. say TfL is '**Not moving**' or '**On the way down**'), **Re-investment** and **Journey Planner** are stronger at influencing the feeling that TfL **cares about its customers.**

% agree the campaign makes me feel TfL **cares about its customers by momentum**
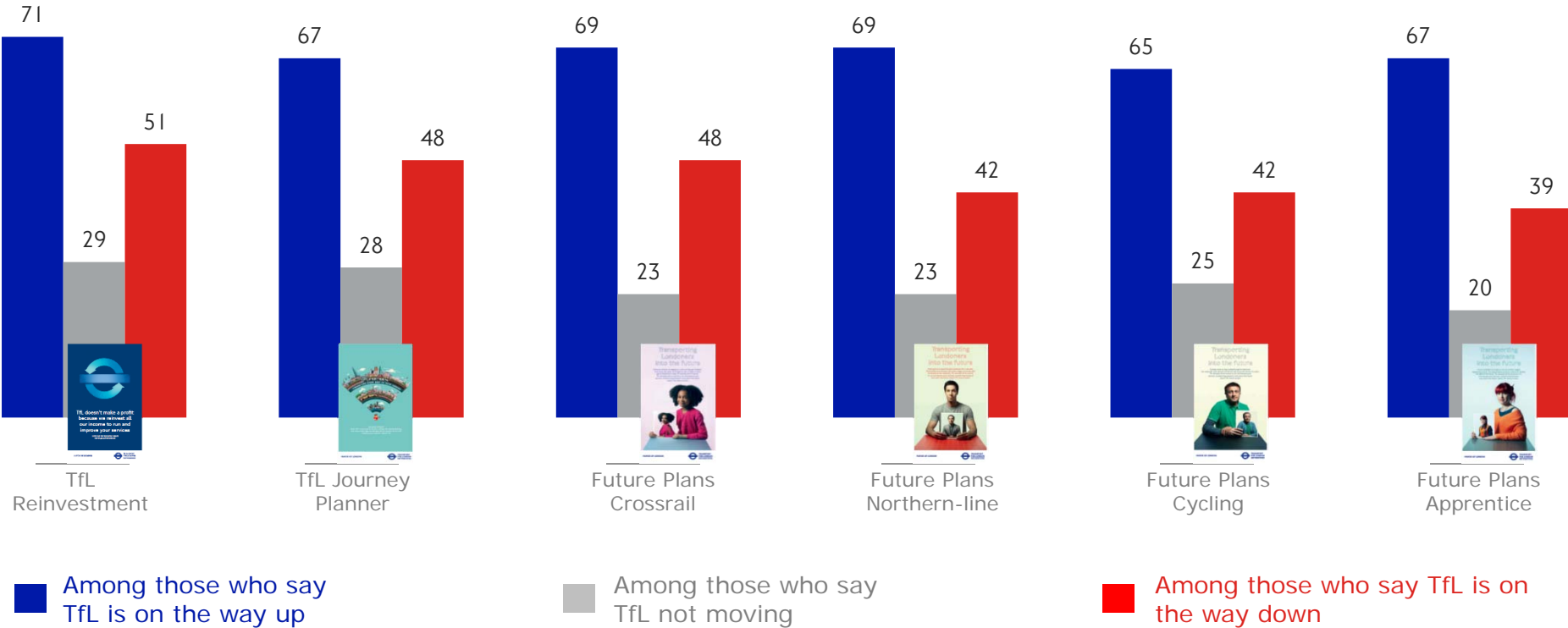
	TfL Reinvestment	TfL Journey Planner	Future Plans Crossrail	Future Plans Northern-line	Future Plans Cycling	Future Plans Apprentice
Among those who say TfL is on the way up	71	67	69	69	65	67
Among those who say TfL not moving	29	28	23	23	25	20
Among those who say TfL is on the way down	51	48	48	42	42	39

- ■ Among those who say TfL is on the way up
- ■ Among those who say TfL not moving
- ■ Among those who say TfL is on the way down

Q5. Thinking about the ads you have been shown, to what extent do you agree or disagree each ad "makes me feel that Transport for London cares about its customers"? Base: On the way up (478), On the way down (118), Not moving (198)

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The **Reinvestment** ad also performs **slightly stronger** on the '**communicates openly and honestly**' metric. Again, the four 'Future Plans' ads perform on par with one another.

% agree the campaign makes me feel TfL **communicates openly and honestly**

| 52 | 50 | 47 | 46 | 46 | 45 |

TfL Reinvestment | TfL Journey Planner | Future Plans Crossrail | Future Plans Northern-line | Future Plans Apprentice | Future Plans Cycling
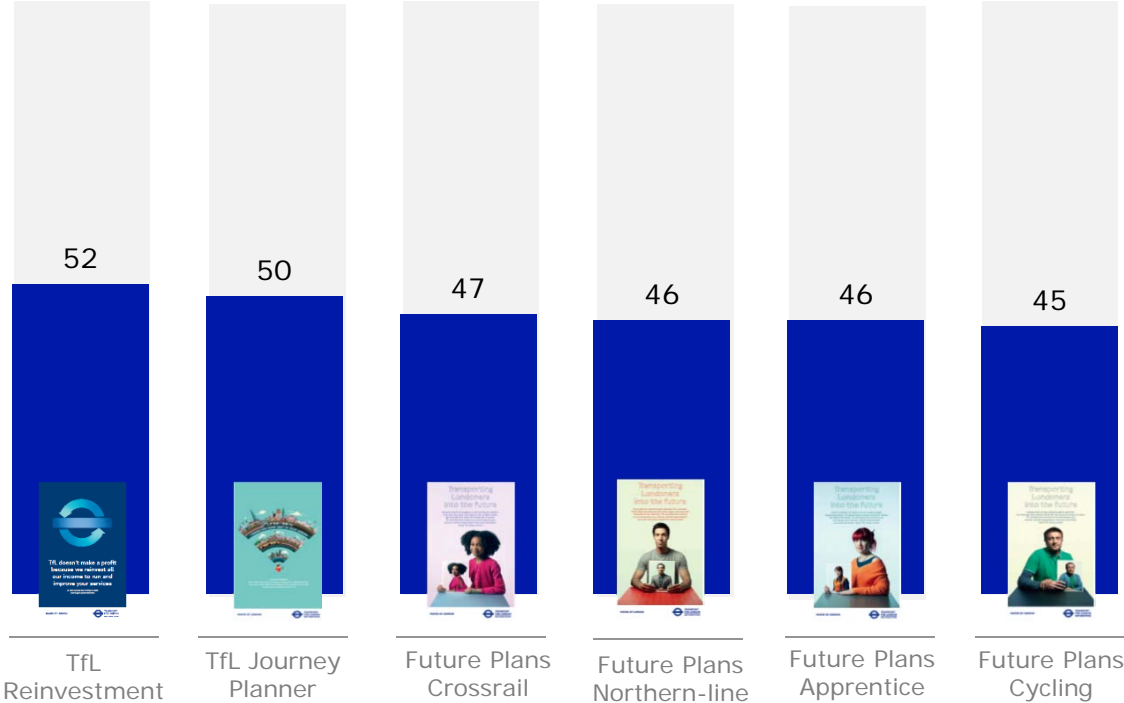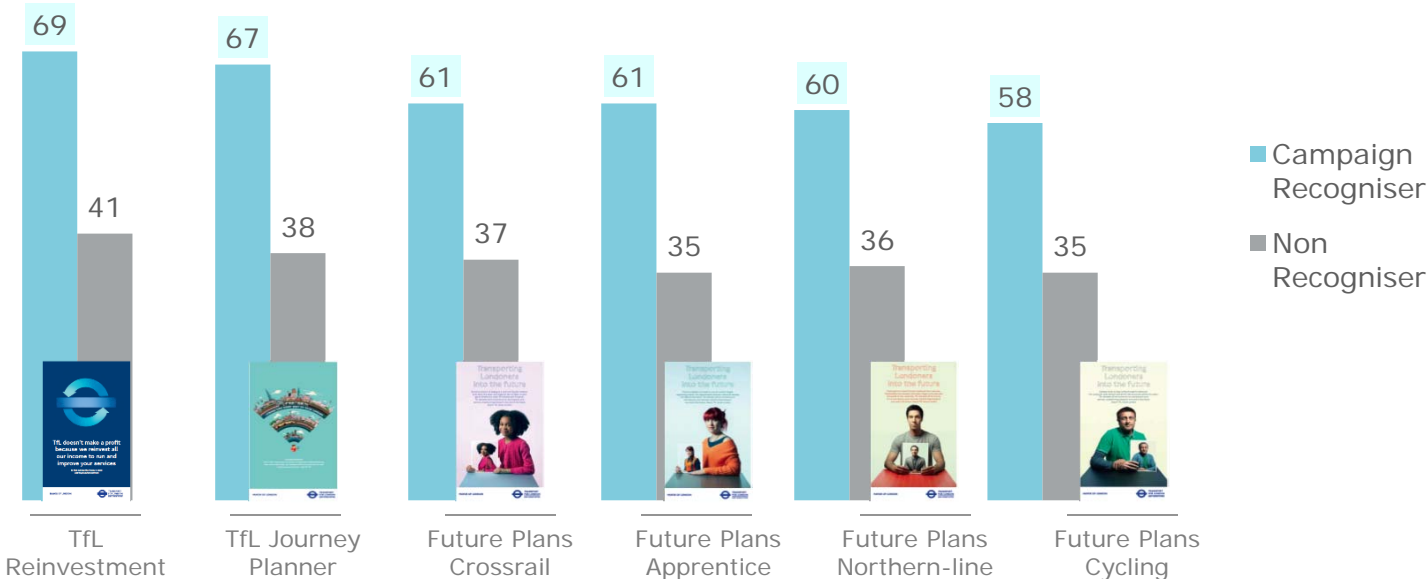
N.B. Strongly agree is highest for TfL Re-investment ad at 25% (compared to 17-19% for other ads) *See appendix for detail

Among those who have seen the ads, there are high levels of agreement that the **ads make them feel TfL communicates openly and honestly.** Again, this is **strongest for the Re-investment ad.**

% agree the campaign makes me feel TfL **communicates openly and honestly by campaign recognition**

Significant difference between recognisers and non recognisers

Campaign Recogniser
Non Recogniser

	TfL Reinvestment	TfL Journey Planner	Future Plans Crossrail	Future Plans Apprentice	Future Plans Northern-line	Future Plans Cycling
Campaign Recogniser	69	67	61	61	60	58
Non Recogniser	41	38	37	35	36	35

A
Appendix

Reputational ad diagnostics – detailed

% agree the ads make me feel TfL cares about its customers

% strongly agree   **% slightly agree**   Net agree:

TfL Reinvestment ad — **54%**
| 25% | 28% |

TfL Journey Planner ad — **51%**
| 18% | 33% |

TfL Future Plans: Crossrail ad — **50%**
| 19% | 31% |

TfL Future Plans: Northern-line ad — **49%**
| 17% | 32% |

TfL Future Plans: Cycling ad — **48%**
| 16% | 32% |

TfL Future Plans: Future Apprentice ad — **47%**
| 16% | 31% |

*Nothing above 12% disagreement for each statement

% agree the ads make me feel TfL communicates openly and honestly

% strongly agree   **% slightly agree**   Net agree:

TfL Reinvestment ad — **52%**
| 25% | 27% |

TfL Journey Planner ad — **50%**
| 19% | 31% |

TfL Future Plans: Crossrail ad — **47%**
| 19% | 28% |

TfL Future Plans: Northern-line ad — **46%**
| 19% | 29% |

TfL Future Plans: Future Apprentice ad — **46%**
| 17% | 27% |

TfL Future Plans: Cycling ad — **45%**
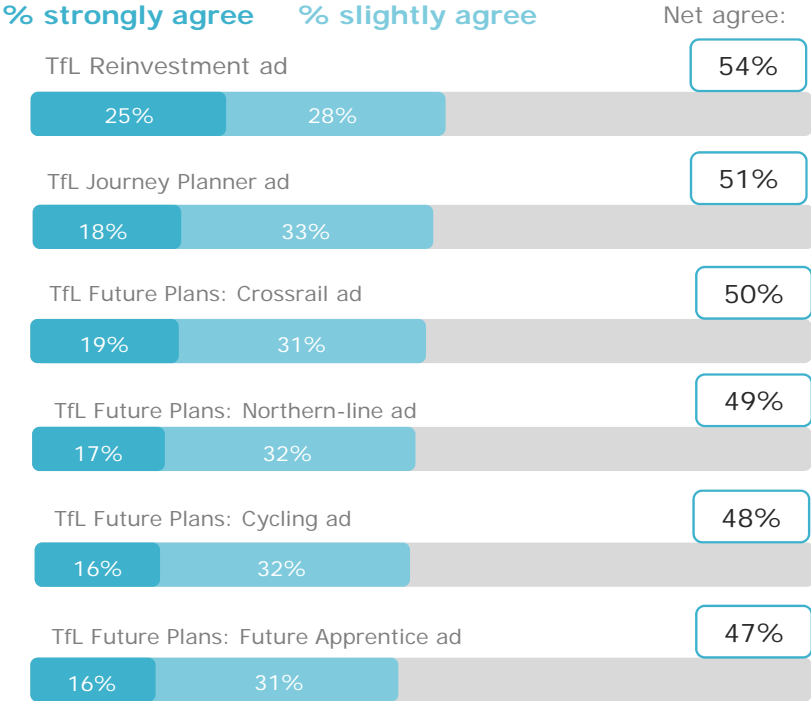| 17% | 28% |
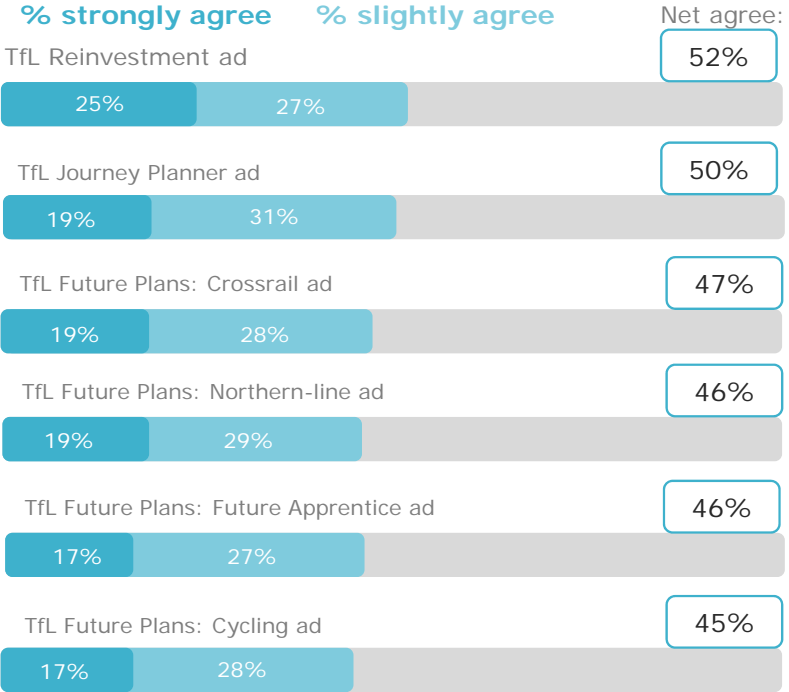
*Nothing above 12% disagreement for each statement

Q5. Thinking about the ads you have been shown, to what extent do you agree or disagree each ad "makes me feel that Transport for London cares about its customers"? "makes me feel that Transport for London communicates openly and honestly"?
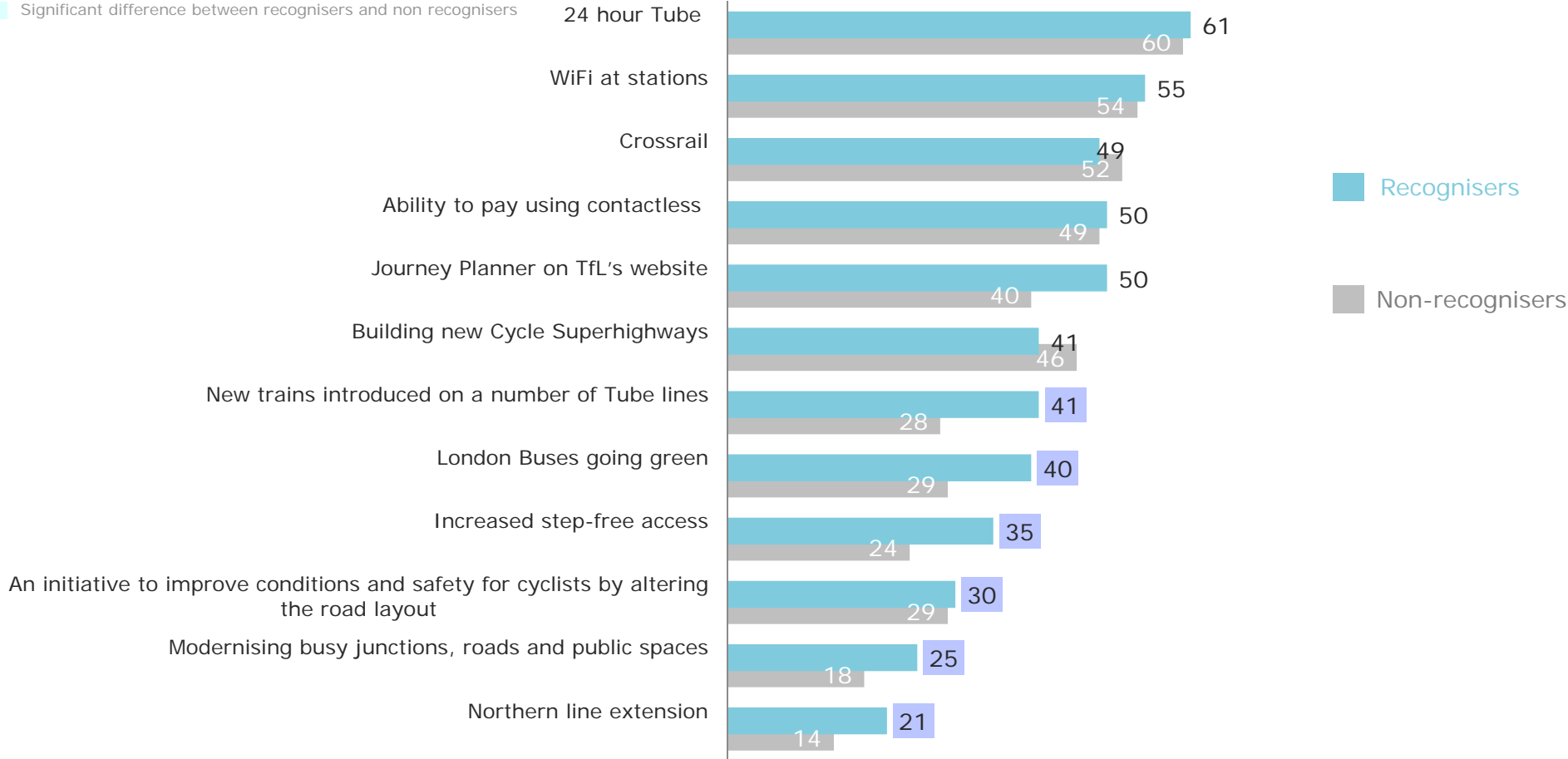Base: Total (907)

Awareness of TfL investments by campaign recognition

Awareness of TfL investments

% aware

□ Significant difference between recognisers and non recognisers

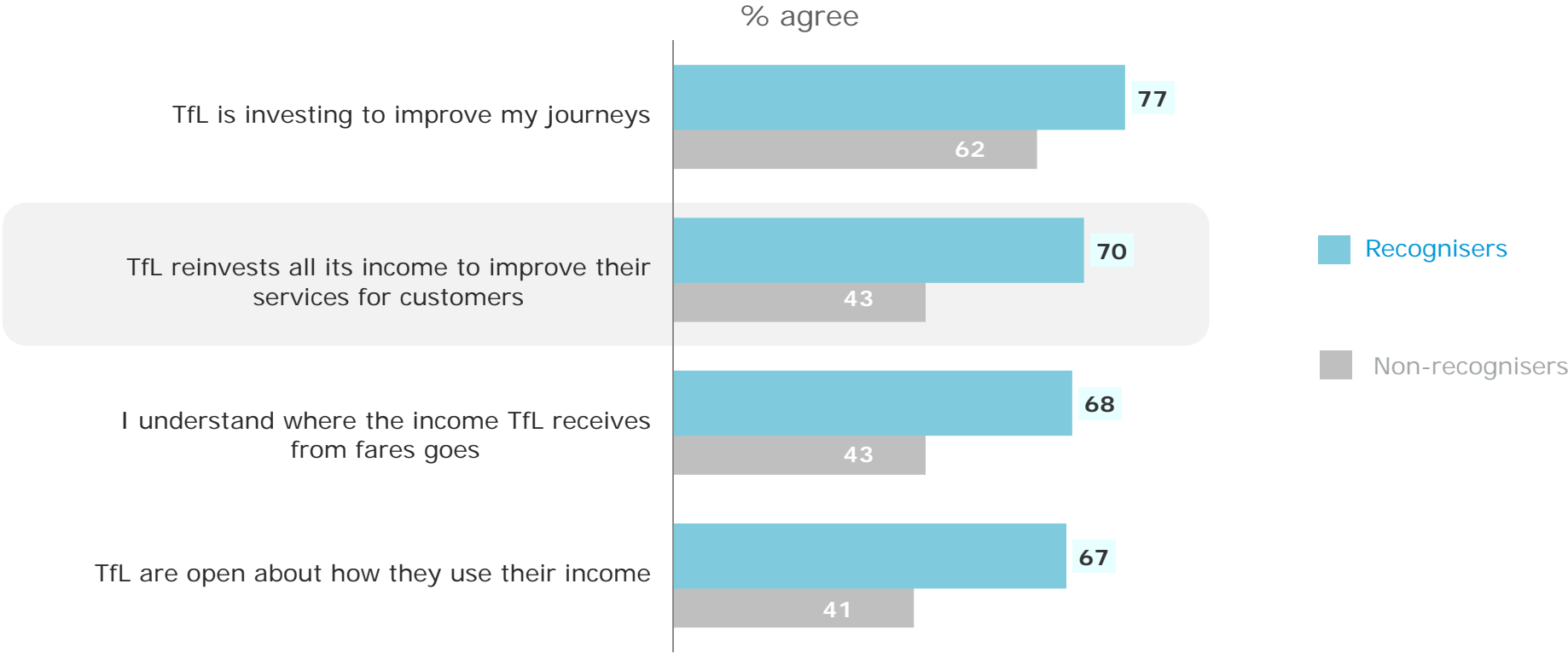| Investment	Recognisers	Non-recognisers
24 hour Tube	61	60
WiFi at stations	55	54
Crossrail	49	52
Ability to pay using contactless	50	49
Journey Planner on TfL's website	50	40
Building new Cycle Superhighways	41	46
New trains introduced on a number of Tube lines	41	28
London Buses going green	40	29
Increased step-free access	35	24
An initiative to improve conditions and safety for cyclists by altering the road layout	30	29
Modernising busy junctions, roads and public spaces	25	18
Northern line extension	21	14

Q3. Before today, which (if any) of the following Transport for London investments were you aware of? Base: Campaign recogniser (381), Non Recogniser (526)

24

Attitudes towards TfL's investment by campaign recognition
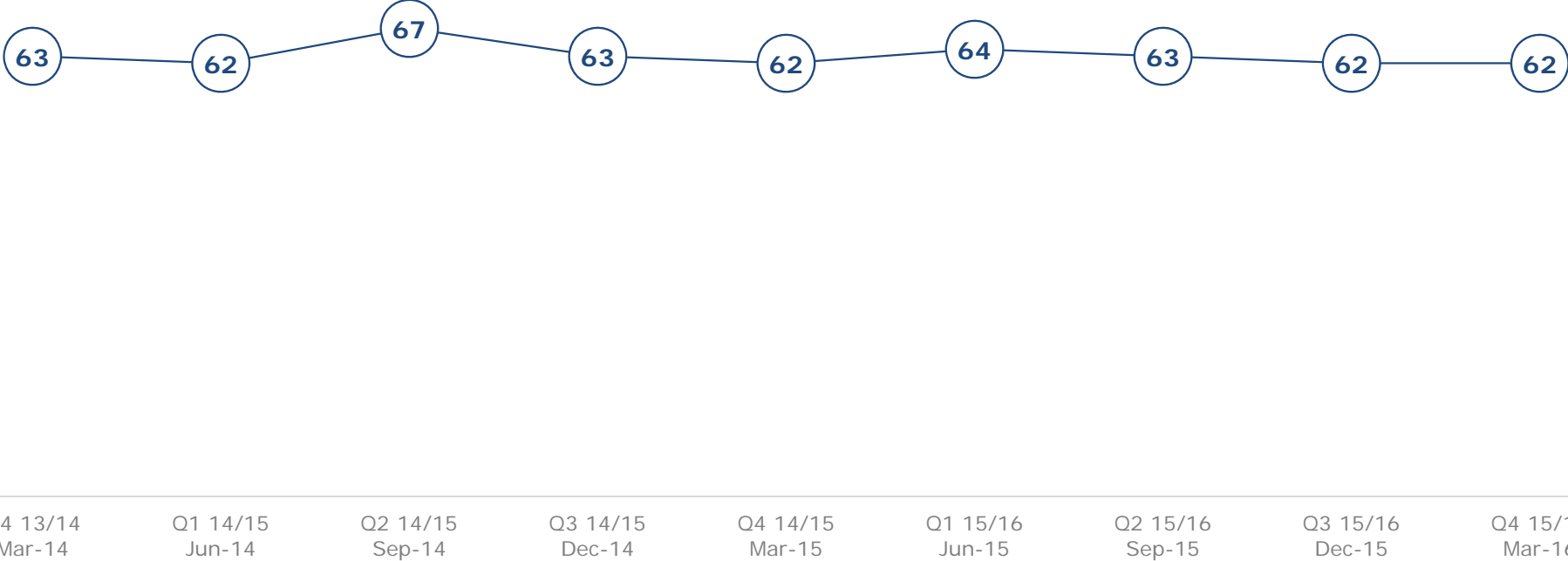
Attitudes towards TfL's investment (%)

Significant difference between recognisers and non recognisers

% agree

TfL is investing to improve my journeys
- Recognisers: 77
- Non-recognisers: 62

TfL reinvests all its income to improve their services for customers
- Recognisers: 70
- Non-recognisers: 43

I understand where the income TfL receives from fares goes
- Recognisers: 68
- Non-recognisers: 43

TfL are open about how they use their income
- Recognisers: 67
- Non-recognisers: 41

Legend:
- Recognisers
- Non-recognisers

Q2. How much do you agree or disagree with the following statements about Transport for London (TfL)? Base: Total (907), Campaign recogniser (381), Non Recogniser (526)

25

Agreement TfL 'provides a joined up, integrated transport system' has remained relatively stable over 2015/16.

% agree TfL provides a joined up, integrated transport system*

Q4 13/14 Mar-14	Q1 14/15 Jun-14	Q2 14/15 Sep-14	Q3 14/15 Dec-14	Q4 14/15 Mar-15	Q1 15/16 Jun-15	Q2 15/16 Sep-15	Q3 15/16 Dec-15	Q4 15/16 Mar-16
63	62	67	63	62	64	63	62	62