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Policy and Resources Committee

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APPENDIX TO ITEM NO. 11

RESULTS OF TRIENNIAL OPINION POLLING OF THE CITY OF LONDON CORPORATION'S KEY AUDIENCES

John Barradell
Town Clerk and Chief Executive

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City of London Corporation Polling 2013

Overall report

Contents

1. Executive Summary

1.1 Background

The City of London Corporation commissioned TNS BMRB, a leading independent research agency, to conduct major polling surveys of its four key constituency groups. This report compares and summarises the findings across all four groups. There is also a separate report by TNS BMRB on each group (City workers, City residents, City businesses and senior City executives.)

The surveys gauged opinions about living/working in the City, and views about the City of London Corporation and its services. These results help enable the City of London Corporation to shape its future priorities.

1.2 Methodology

Interviews were conducted with each constituency group during April/May 2013. Residents and workers were interviewed face to face. Executives and businesses were interviewed on the telephone. 500 interviews were conducted with businesses and with workers, 222 were conducted with residents and 158 with senior executives.

1.3 Attitudes to the City

Satisfaction with the City as a place to live, work and to run a business remains high, with over nine in ten residents, workers, executives and businesses satisfied with the local area in this respect. Residents are the group most likely to be "very" satisfied. Satisfaction amongst businesses has increased by nine percentage points since 2009.

Workers and businesses were most likely to see the **location** of the City and the **ease and convenience of getting** to the City as its good points, and mention of these has increased since 2009.

In terms of bad things about the City, both City workers and businesses cite **traffic congestion**, **poor parking**, **building/roadworks** and the **expense** as downsides to working in the City.

1.4 Corporate Health

Satisfaction with the way the City of London Corporation runs things remains high. **Residents** and **senior executives** tend to be the **most** satisfied (87% and 85% satisfied respectively). **Workers** and **businesses** tend to be relatively **less** satisfied (75% and 69% respectively). These levels of satisfaction have remained stable since 2009. However, satisfaction among businesses did fall from 84% in 2003 to 72% in 2009.

The above pattern of comparative satisfaction levels among the four constituency groups is repeated for perceptions of the **value for money** provided by the Corporation. 73% of residents agree that it provides value for money compared to only 40% of businesses. It is likely that **familiarity** with the Corporation drives perceptions of value for money and satisfaction with how well it runs things; when asked how well they feel they know the City of London Corporation the same pattern emerges. 67% of residents feel they know the Corporation very well or a fair amount compared to only 29% of businesses.

1.5 Services provided by the City of London Corporation and other providers

City workers, senior executives and businesses give **bars and restaurants** in the City their highest satisfaction rating. Residents on the other hand are most satisfied with **refuse collection**.

The service with which residents, City workers and businesses are most likely to be <u>dis</u>satisfied is the **public convenience and community toilet scheme.**

Shopping facilities is an area of high satisfaction for all four groups, and satisfaction with this service has increased significantly for all four groups since 2009; a reflection of the investment that City of London Corporation have made in this service.

Policing is in all four groups' top ten for satisfaction. The majority of all four groups is aware that the square mile is policed by the City of London police.

Whilst good **public transport** and **ease of access** are most commonly identified by workers and businesses as **good** aspects about the City, these two groups nevertheless also see scope for further improvement in these regards. Each identify **traffic congestion** and **public transport/commuting** as key priorities to **improve** the City as a place to work/do business

1.6 Promoting the City

Around six in ten businesses and senior executives feel that the Corporation **should increase its role** in promoting the City. These levels are the same as in 2009 for businesses and higher by ten percentage points for senior executives. Six in ten businesses and just under half of senior executives think that the Lord Mayor **should do more to promote** the City.

Senior executives most commonly see European financial/banking **regulation** as the number one potential threat to the City's long term status as a leading global financial centre (72%). **Personal taxation** is seen as a threat by 46%.

1.7 Communication and Contact

While the majority (86%) of City **residents** say that the City of London Corporation keeps them very well or fairly well informed, only a minority of **workers** (30%) and **businesses** (42%) say this. More residents feel informed than did in 2009 (86% vs. 77%). The proportion of businesses feeling informed remains the same as in 2009. The proportion of City workers feeling informed is lower than in 2009 (30% vs. 36%).

For **residents**, the key **sources** of information about the Corporation's activities are the Corporation's newsletter (47%) and mailshots/leaflets (40%). Their preference is to continue to hear Corporation news through these channels, although email is also a relatively popular choice.

City **workers**, on the other hand, primarily rely on free commuter newspapers for their information about the Corporation: Metro (23%) or Evening Standard (19%). They also cite personal experience of working in the City (23%). Their top preference is to hear about the Corporation in Metro (30%), although 19% would prefer email and 18% the Evening Standard.

Businesses tend to hear about the Corporation through mailshots/leaflets (18%). However, their second most mentioned source is the Corporation's website (16%). Nearly half (45%) would prefer to hear about the Corporation's activities by email. Email is also favoured as a contact method by **senior executives** (52%).

There is relatively low awareness of either the Corporation's columns or adverts in **City AM** newspaper, although awareness is higher among the target audience of senior executives, with around a third aware of these communications. Awareness of specific Corporation newsletters aimed at residents and senior executives was much higher. Three-quarters of residents are aware of "City Resident". Half of senior executives are aware of "City View".

Social media are widely used – either personally (residents, workers) or corporately (businesses). Two-thirds of City workers and half of City residents say that they use **Facebook**. A third of businesses do so corporately. Of any social media, businesses are most likely to use **Twitter** corporately.

Around two-fifths of residents and a quarter of businesses have contacted the City of London Corporation in the past year. The majority of these contacts are by **phone** (51% for residents, 61% for businesses) and about a quarter are by **email.** If the Corporation were contacting them in the future, businesses in particular tend to prefer to be contacted by email (70%). Residents are more evenly split in their preference between letter and email (42% and 49% respectively).

Residents are the group most likely to have visited the Corporation's website in the last 12 months, with two-fifths (44%) having done so. In comparison, only a third of businesses and a fifth of workers have visited the website. Both residents' and businesses' most commonly anticipated use of the Corporation's website is as a **source of information**

1.8 Implications

There are implications for both **policy** and **communications** arising from this research.

The key **policy** implications arising are around **transport** and **promotion of the City's interests**:

- While satisfaction with transport (in particular the underground) has increased since 2009, a key priority for the Corporation's constituency groups remains making it as easy as possible for people to get to/from and around the City.

- Businesses and senior executives would like the Corporation to do more to promote the City's interests. The key threats to the City in their view are European financial/banking regulation, personal taxation, transport and immigration controls/visa restrictions.

The key implications arising for **communications** are around **which constituency groups** there is greatest scope to influence more positively, and whether current communication channels are optimal:

- **Businesses** and **workers** are the groups amongst which there is most scope to improve perceptions of the Corporation. Businesses are least connected with the corporation and also least satisfied in terms of value for money and the way the corporation runs things.

- In particular, more could be done to promote services. Few city **workers** are aware of any services offered by the Corporation outside the square mile, and use of services by residents has fallen this year, alongside a fall in satisfaction for many services.

- The willingness of all four groups to received information **digitally** suggests that there is potential to send e-newsletters alongside or instead of the popular current paper-based publications, and also to tap into widespread social media usage.

- In terms of print media, **Metro** newspaper would reach more City **workers** than City AM does.

2. Background and Methodology

2.1 Background

The City of London Corporation acts as the local authority for the Square Mile business district around St Paul's, supports the UK-based financial services industry and provides many other services and facilities for London and the wider UK.

The three key strands of The City of London Corporation's strategy for the next three years are:

- Support and promote "The City" as the world leader in international finance and business services;
- Promote the City of London Corporation as the provider of modern, efficient and high quality local and policing services within the Square Mile for residents, workers, businesses and visitors;
- Promote the role of the City of London Corporation as a provider of valued services to London and the nation as a whole.

The Corporation has been running this work since 2000 as a way of polling opinions of its key constituencies. The key objectives are to understand constituencies' knowledge and opinions of the City of London Corporation, and the services these constituencies use, as well as satisfaction with these services.

The City of London Corporation conducts major polling work of its key constituencies every three years amongst:

- City businesses
- Senior City executives
- City workers
- City residents

The City of London Corporation commissioned TNS BMRB to conduct the 2013 polling exercise. This report compares and summarises the findings across all four constituency groups. There is also a separate report by TNS BMRB on each group.

The aim of the project was to assess the views of the four constituency groups towards living/working/doing business in the City, their opinion of and familiarity with the City of London Corporation, and their satisfaction with the Corporation's activities and other local services. Other aspects, such as usage of social media, usage of various information, news and contact channels and suggested areas for improvement were also considered.

2.2 Methodology

The table below summaries key information about how the four constituency groups were surveyed. Note the related caveat in Section 2.3.

	Residents	Businesses	Workers	Executives
Number of interviews	222	500	500	158
Method of interviewing	Face to face in home	Telephone	Face to face in street	Telephone
Sampling	Random Location	Quota	Quota	Pre-selected
Quotas	Set on age, gender, ethnicity and working status of women	No set quotas, but size of business monitored throughout fieldwork	Set on sector and job function/level	n/a
Weighting	By age and ethnicity	None	By gender, sector and job function/level	None
Length of questionnaire	20 mins	15 mins	10 mins	15 mins
Fieldwork dates	2-29 April 2013	2-25 April 2013	2 April – 1 May 2013	2 April – 17 May 2013

2.3 Comparing results by constituency group

Two of the constituency groups were interviewed face to face, two by telephone. The differing interviewing media will have had some effect on the results, meaning that data collected face to face are not strictly comparable with data collected by telephone. Furthermore, by necessity, the questionnaire also varied slightly by group. Again, this means data from different groups are not strictly comparable. Nevertheless, it is reasonable in practice to make comparisons by constituency group where the data are broadly comparable.

2.4 Statistical testing

We have tested for statistical significance to ensure that any differences reported between groups or between one year and another are *real* differences and not differences that might be observed because we have only surveyed a sample, rather than the whole population.

For the purposes of this report, we have commented on any differences that are found to be significant at the 95% confidence level (i.e. there is only a 5% likelihood that the difference could have occurred by chance). Where no reference is made to differences, this is because they are not statistically significant. This is particularly relevant when comparing small groups, where a much bigger difference would need to be observed for it to be a statistically significant difference.

2.5 Reporting notes

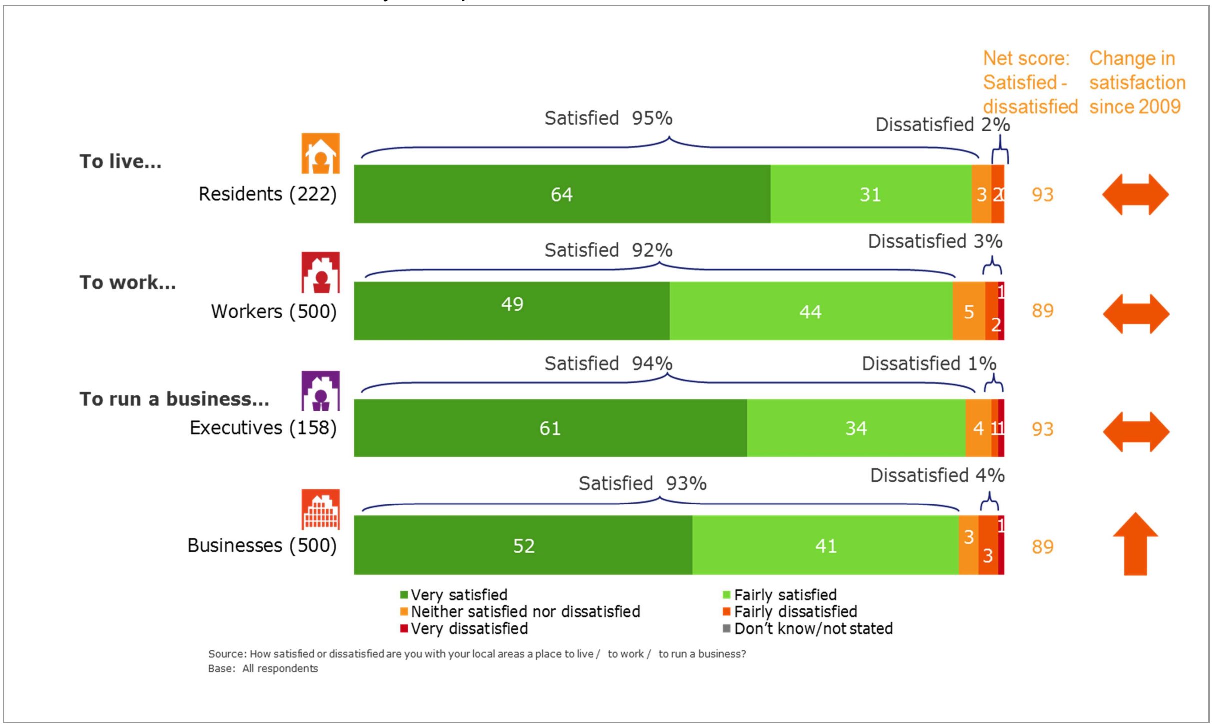
Where percentages shown in tables or charts do not sum to exactly 100% (or where they do not exactly sum to a summary statistic given, such as agree/disagree), this will be due to rounding of constituent items to the nearest whole number.

3. **Attitudes to the City**

All groups were asked their attitudes towards the City of London; residents as a place to live, workers as a place to work and city executives and business managers were asked what they thought of the City as a place to run a business.

Satisfaction with the City as a place to live, work and to run a business remained high, with over nine in ten residents, workers, executives and businesses satisfied with the local area in this respect (Chart 1). Residents were the most likely to be "very" satisfied. Satisfaction amongst businesses has increased by nine percentage points since 2009.

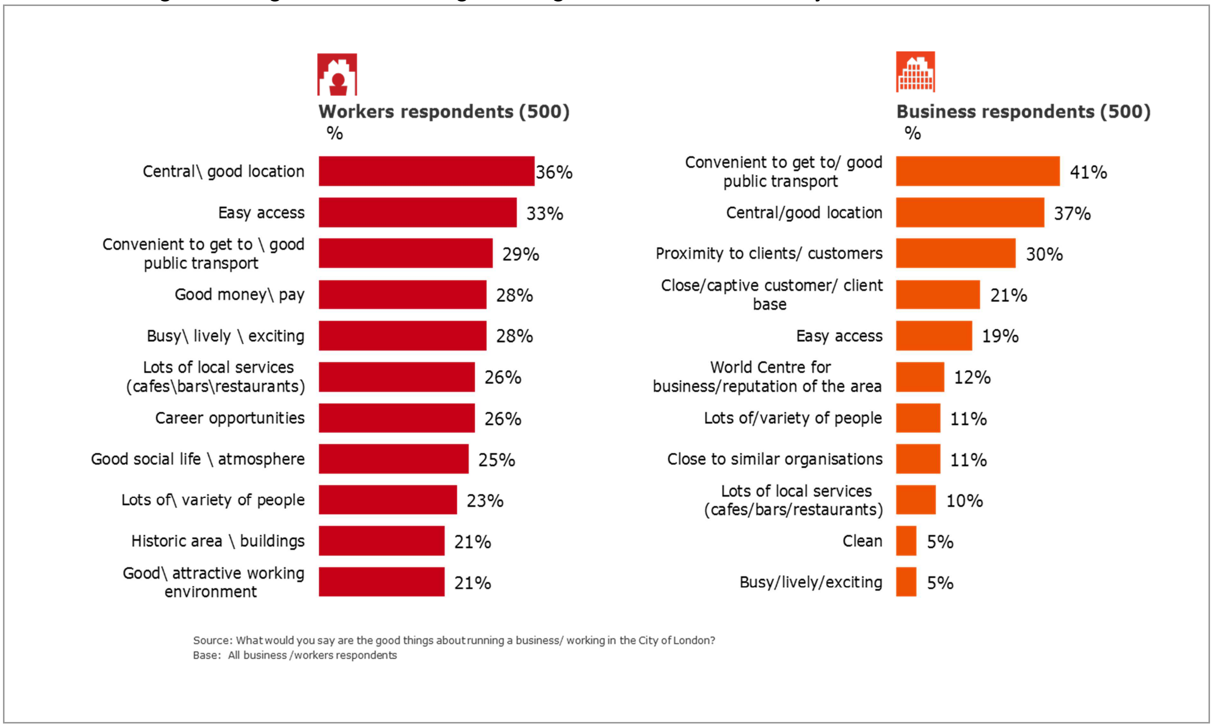
Chart 1: Satisfaction with the City as a place to live/work/do business



City workers and businesses were asked to identify the good things and the bad things about working/running a business in the City.

Workers and businesses were most likely to see the location of the City and the ease and convenience of getting to the City as its good points (Chart 2). Mention of these has increased since 2009. The other good things mentioned were more specific to each group. For example workers were apt to point out the benefits of higher pay, career opportunities and a lively environment when working in the City. Businesses, on the other hand, were more likely to mention the close proximity of clients and the City as a world centre for business/its good reputation.

Chart 2: The good things about working/running a business in the City

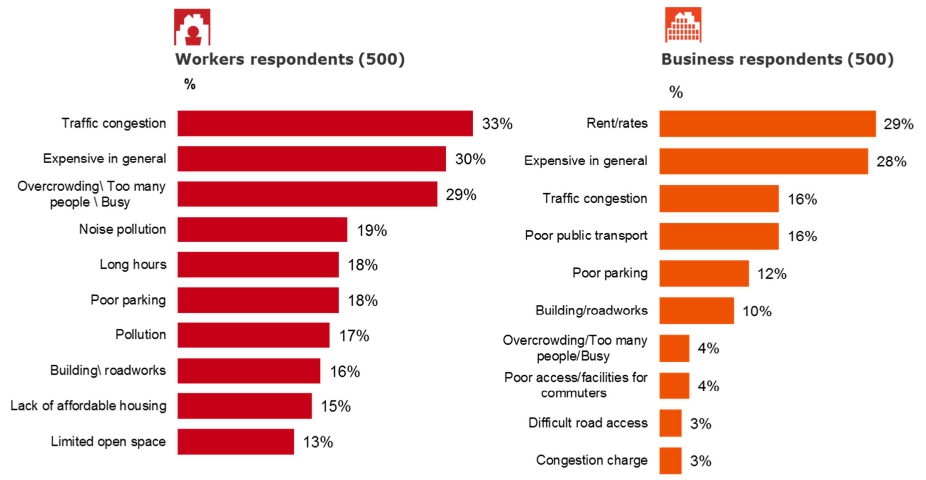


In terms of bad things about the City, both City workers and businesses cited traffic congestion, poor parking, building/roadworks and the expense as downsides to working in the City (Chart 3).

Over-crowding was a further common concern amongst workers, up ten percentage points since 2009. Noise pollution and pollution generally also featured in City workers' top ten gripes, as did long hours, lack of affordable housing and limited open spaces. Workers were more likely than businesses to mention bad points about the City, with each of the top ten answers receiving mentions by over 10% of workers.

The expense of rents/rates specifically and poor public transport were of particular concern to businesses.

Chart 3: The bad things about working/running a business in the City

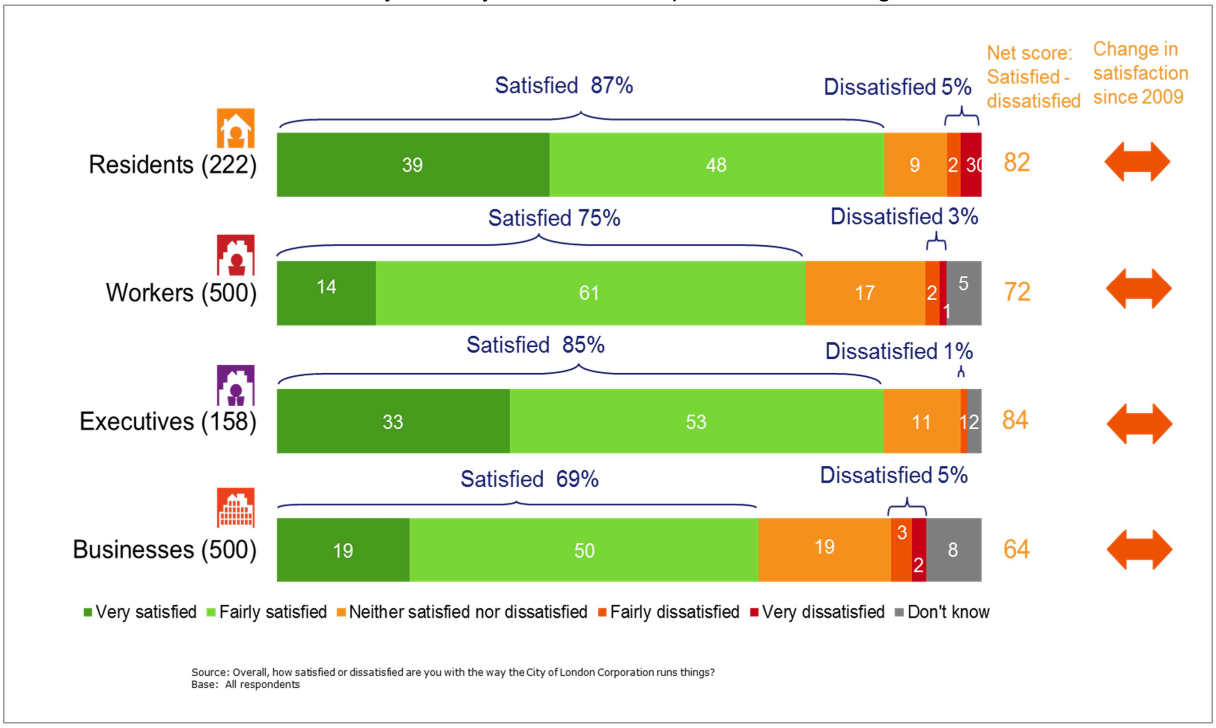


Source: And what would you say are the bad things about working/ running a business in the City of London?
Base: All business / workers respondents

4. Corporate Health

Satisfaction with the way the City of London Corporation runs things[1] remained high (Chart 4). **Residents** and **senior executives** tended to be the **most** satisfied (87% and 85% satisfied respectively). **Workers** and **businesses** tended to be relatively **less** satisfied (75% and 69% respectively). These levels of satisfaction have remained stable since 2009. However, satisfaction among businesses did fall across the 2003-2009 time period from 84% in 2003 to 72% in 2009.

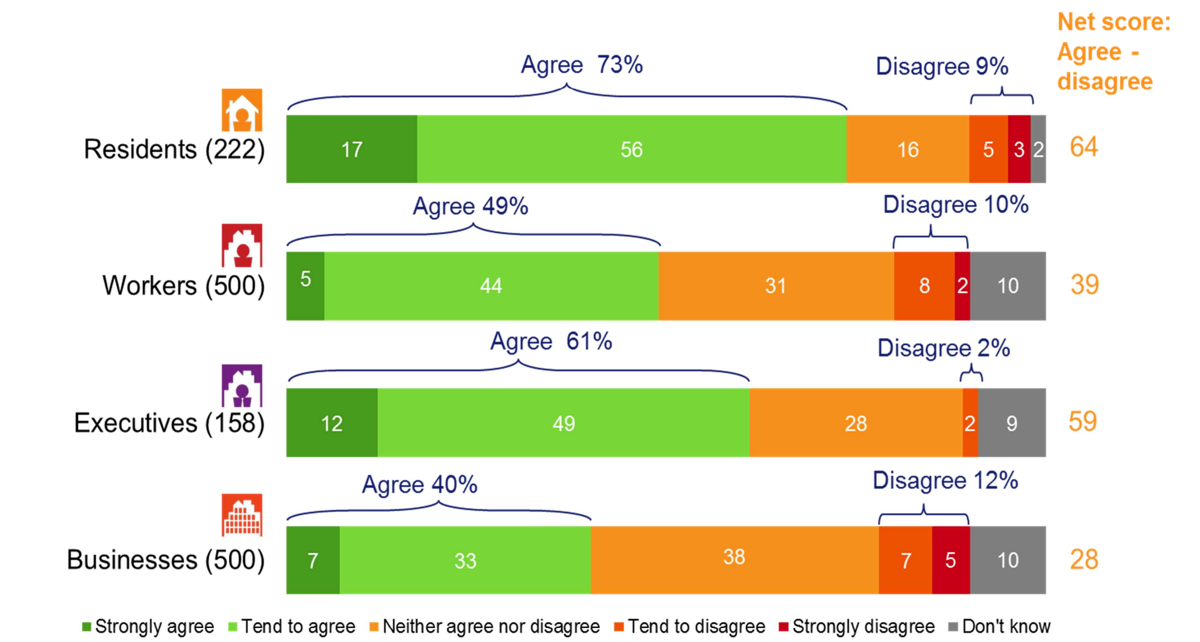
Chart 4: Satisfaction with the way the City of London Corporation runs things



The above pattern of comparative satisfaction levels among the four constituency groups was repeated for perceptions of the **value for money** provided by the Corporation (Chart 5). Residents were most likely to agree it provides value for money (73%), followed by senior executives (61%). Workers (49%) and businesses (40%) were least likely to agree that it provides value for money. There is no data from previous years on this measure.

[1] Note: prior to 2013, this question was worded 'the way the City of London Corporation performs its functions'. Wording was amended to 2013 to 'runs things', to align question wording with the LGA inform guidelines

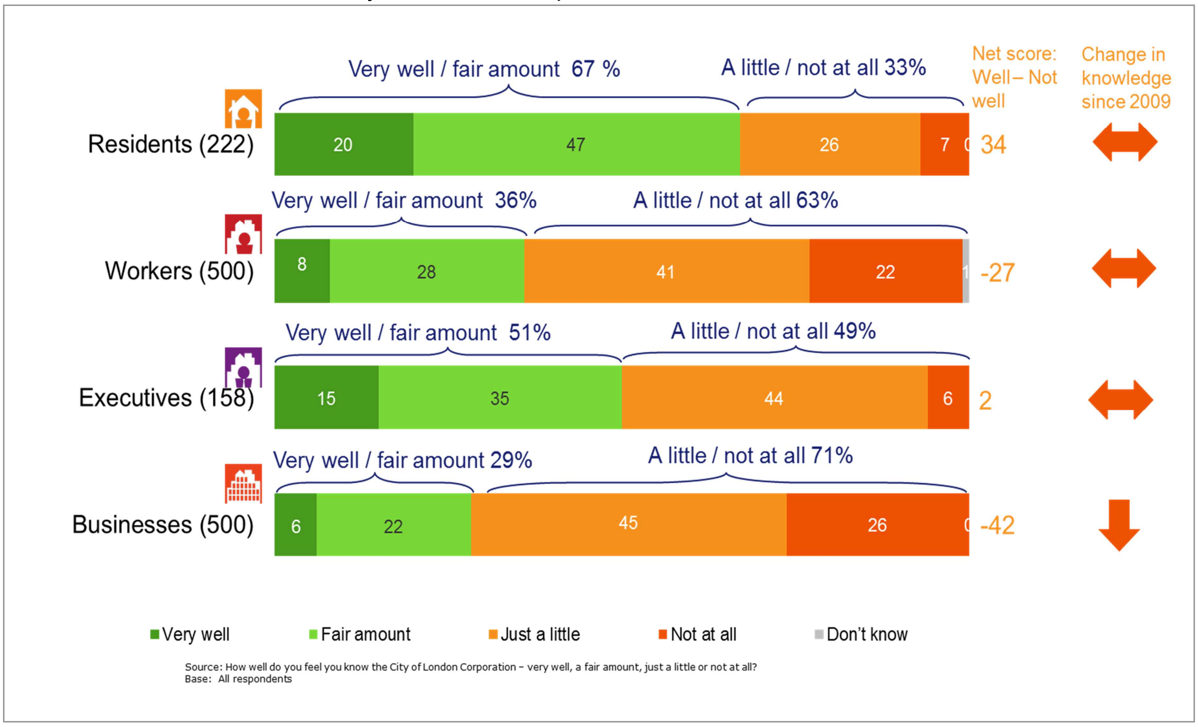
Chart 5: Provides value for money



Source: To what extent do you agree or disagree that the City of London Corporation provides value for money?
Base: All respondents

It is likely that familiarity with the Corporation drives perceptions of value for money and how well it runs things; when asked how well they feel they know the City of London Corporation the same pattern emerges of residents giving the highest scores (67%), followed by senior executives (51%), then workers (36%) and finally businesses (29%). These figures have remained stable since 2009, apart from for businesses where familiarity with the Corporation has decreased significantly (39% down to 29%). Approximately twice as many residents as businesses fell they know the Corporation very well or a fair amount (Chart 6).

Chart 6: How well know the City of London Corporation



5. Services provided by the City of London Corporation and other providers

The City of London Corporation and other providers offer a number of services across the City of London. The ten services with which each constituency group was most satisfied are compared in Chart 7.

City workers, senior executives and businesses gave **bars and restaurants** in the City their highest satisfaction rating. Residents on the other hand were most satisfied with **refuse collection**. **Shopping** facilities and **policing** appear in each group's top ten for satisfaction, reflecting the prioritisation of improvements to shopping facilities made by the Corporation recently. London Underground and Public Transport Information appear in the top ten for satisfaction for all groups except City workers, who are probably the group most exposed to the tube at busy times. The service with which residents, City workers and businesses were most likely to be <u>dis</u>satisfied was the **public convenience and community toilet scheme** (senior executives were not asked to rate this).

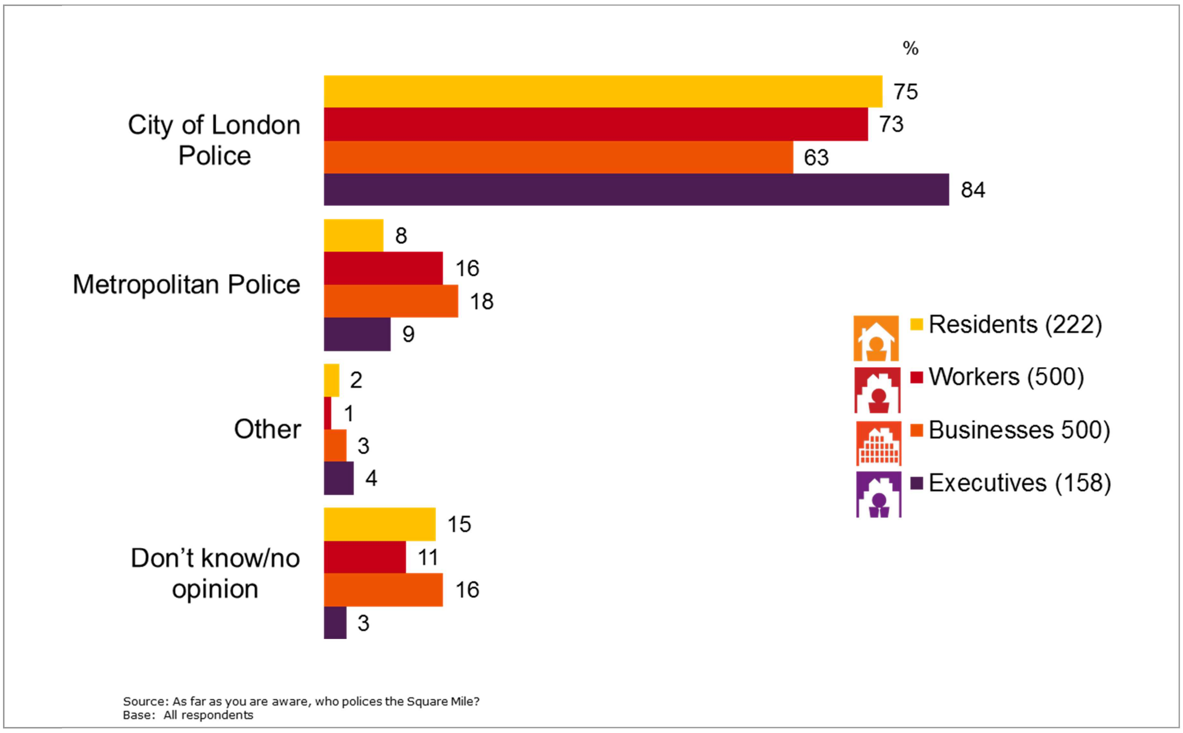
Chart 7: Satisfaction with services in City of London

Residents (222)		City Workers (500)		City Executives (149)		Businesses (369)	
All respondents	%	All respondents	%	All respondents	%	All respondents	%
Refuse collection	91%	Bars and restaurants	91%	Bars and restaurants	95%	Bars and restaurants	96%
London Underground services	89%	Shopping facilities	83%	Taxi services	89%	Taxi services	91%
Street cleansing	88%	Policing services	81%	Policing services	87%	London Underground services	87%
Train services	85%	Pavements and highways	70%	Other support for the Arts	79%	Shopping facilities	85%
Shopping facilities	85%	Museum of London	65%	Shopping facilities	79%	Policing services	85%
Public transport information	84%	Parks / gardens /open spaces	62%	London Underground services	76%	Public transport information	83%
Policing services	83%	Other support for the Arts	58%	Parks, gardens and open spaces	75%	Train services	79%
The Barbican Centre	82%	Refuse collection	58%	Business promotion and support services	74%	Parks, gardens and open spaces	70%
Recycling	82%	The Barbican Centre	54%	Public transport information	73%	Pavements and highways	69%
Museum of London	79%	Business promotion & support services	50%	The Barbican Centre	68%	Museum of London	67%

Source: I am now going to read out a number of services in the City of London. For each one please tell me to what extent are you satisfied or dissatisfied?

The majority of all four groups was aware that the square mile is policed by the City of London police (Chart 8).

Chart 8: Who policies the square mile



Whilst good public transport and ease of access were most commonly identified by workers and businesses as good aspects about the City, these two groups nevertheless see scope for further improvement in these regards. Each identified **traffic congestion** and **public transport/commuting** as key priorities to improve the City as a place to work/do business (Chart 9).

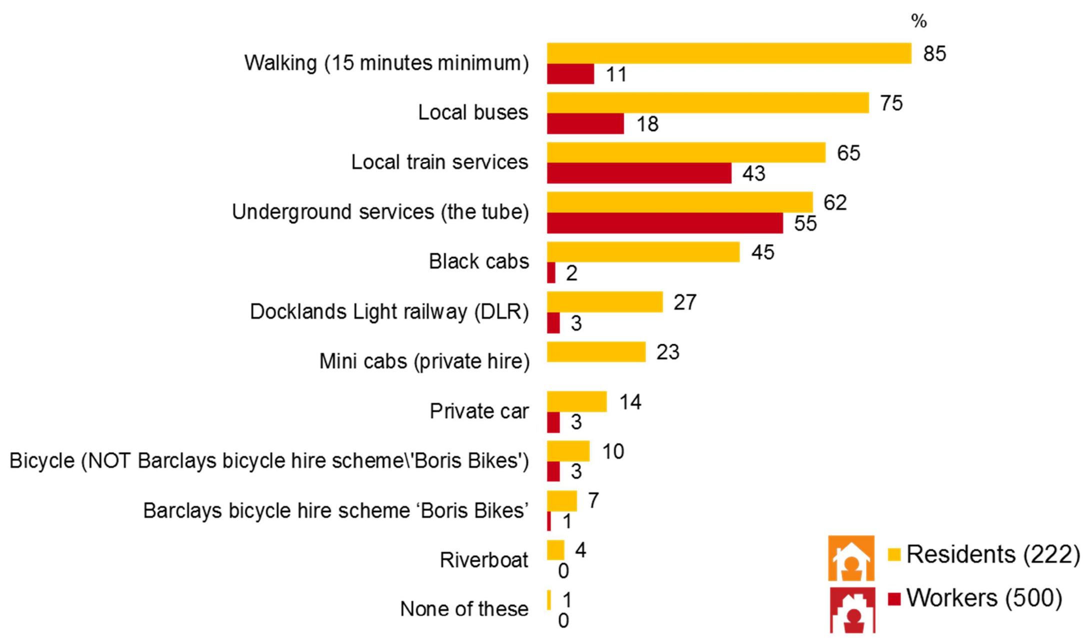
Chart 9: Priorities for City of London Corporation to improve the City

City Workers Base: 500 All respondents	%	Businesses Base: 500 All respondents	%
Traffic/ Congestion	27%	Public Transport/ Commuting	17%
Public Transport/ Commuting	24%	Traffic/ Congestion	13%
Parks/ Gardens/ Open spaces	19%	Reduce business rates/ taxes	12%
Parking services	16%	Policing/ security/ crime reduction	12%
Promotion of the City	14%	Promotion of the City	11%

Source: What do you think should be the two or three priorities for City of London Corporation to improve the City as a place to work/do business?
Base: All businesses./City workers
Top 5 responses shown

Residents most common form of public transport usage is walking (counted as for 15 minutes or more). They also make use of local buses, trains, and the Underground. City workers, on the other hand, are most commonly users of the Underground – in their case to get to/from work (Chart 10).

Chart 10: Public transport used



Source: Of the following different forms of public transport, please indicate which, if any, you use regularly (i.e. at least once a month)/ to complete your normal journey to work.
Base: All Residents/Workers respondents

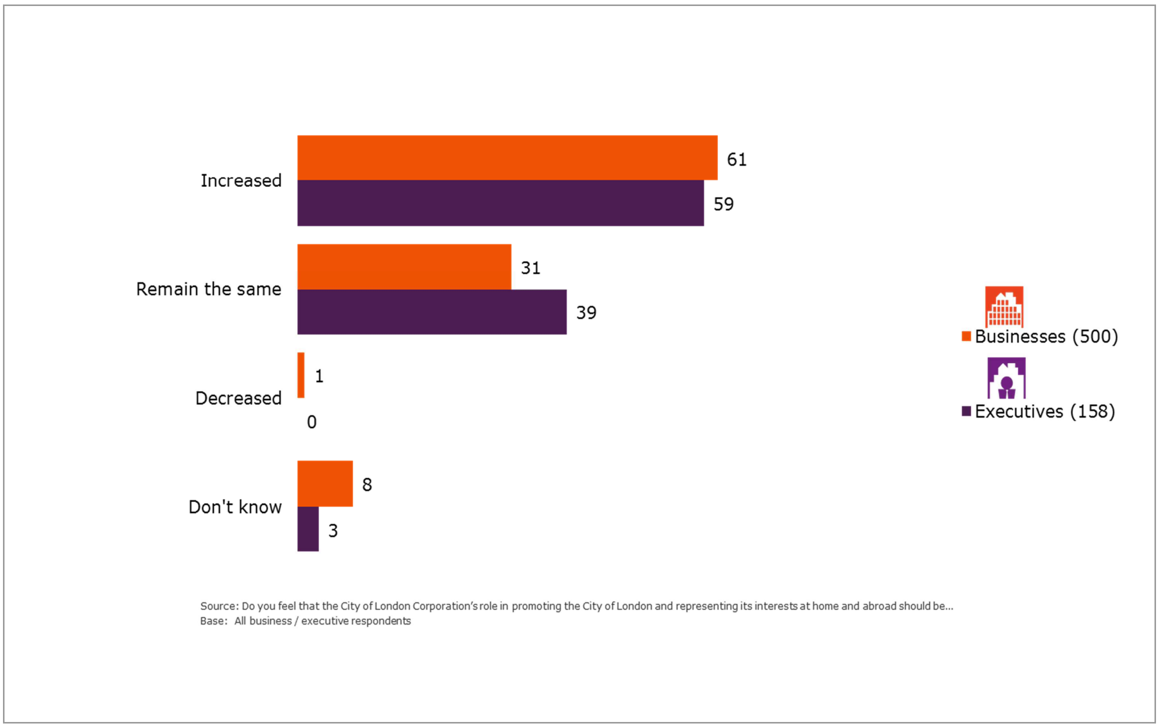
6. Promoting the City

Various strategic aspects of the role of the City of London Corporation were explored with City businesses and/or senior executives.

6.1 Promoting the City

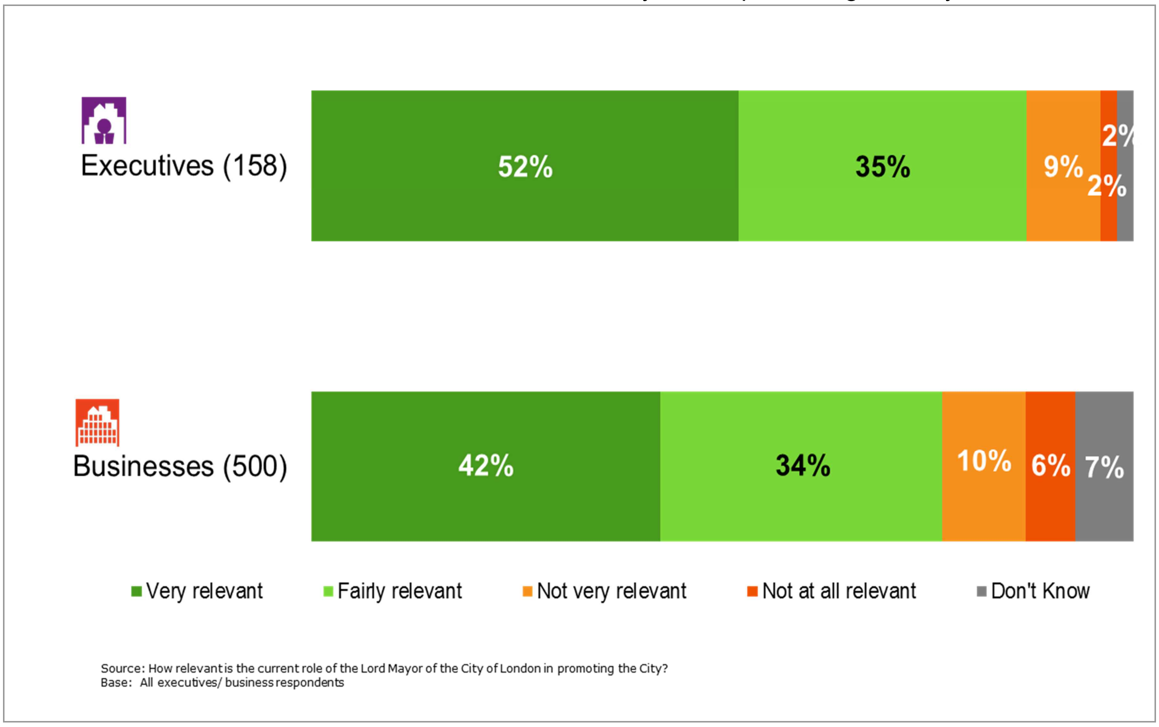
Around six in ten businesses and senior executives felt that the Corporation should increase its role in promoting the City (Chart 11). These levels are the same as in 2009 for businesses and higher by ten percentage points for senior executives.

Chart 11: Whether the City of London Corporation's role in promoting the City and representing its interests should be increased/decreased/remain the same



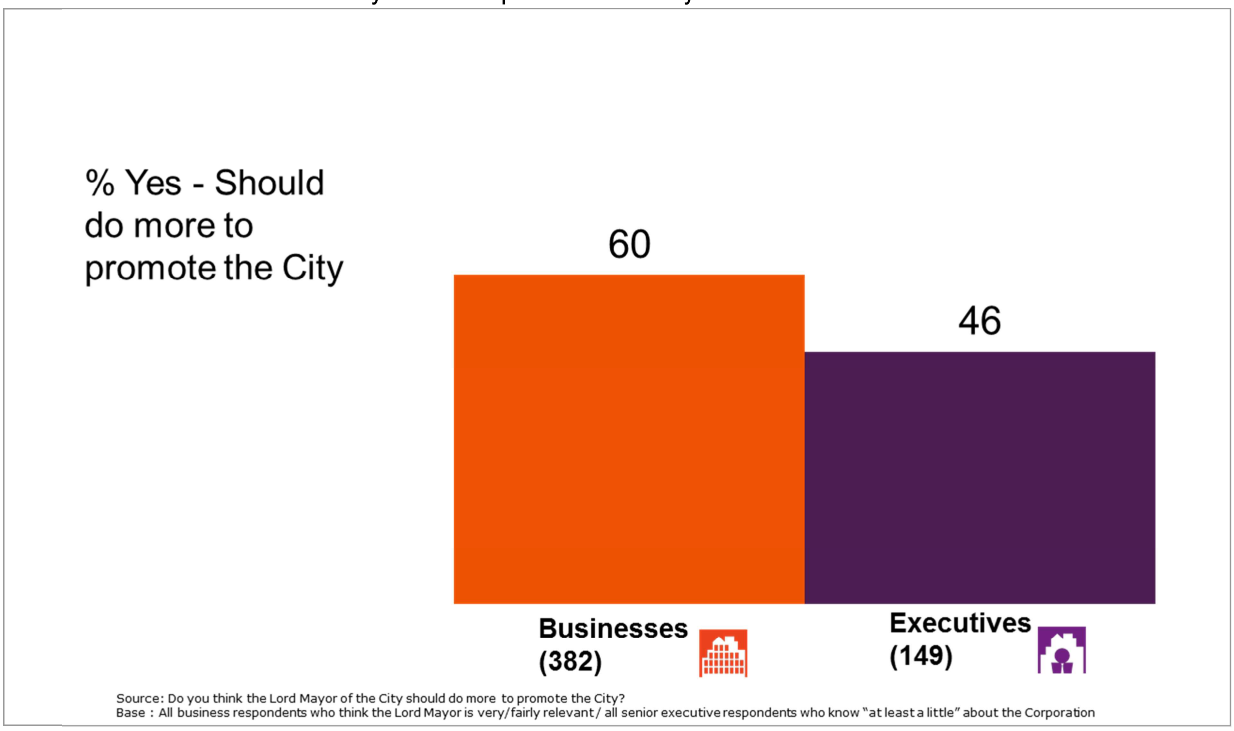
When asked how relevant the current role of the Lord Mayor is in promoting the City, the vast majority of businesses (76%) thought that the role of Lord Mayor in promoting the City is "very" (42%) or "fairly" (34%) relevant. Likewise, a high proportion (87%) of senior executives also felt this way (Chart 12).

Chart 12: How relevant the current role of the Lord Mayor is in promoting the City



Six in ten businesses and just under half of senior executives thought that the Lord Mayor should do more to promote the City (Chart 13).

Chart 13: Whether the Lord Mayor should promote the City more



6.2 The City's competitiveness

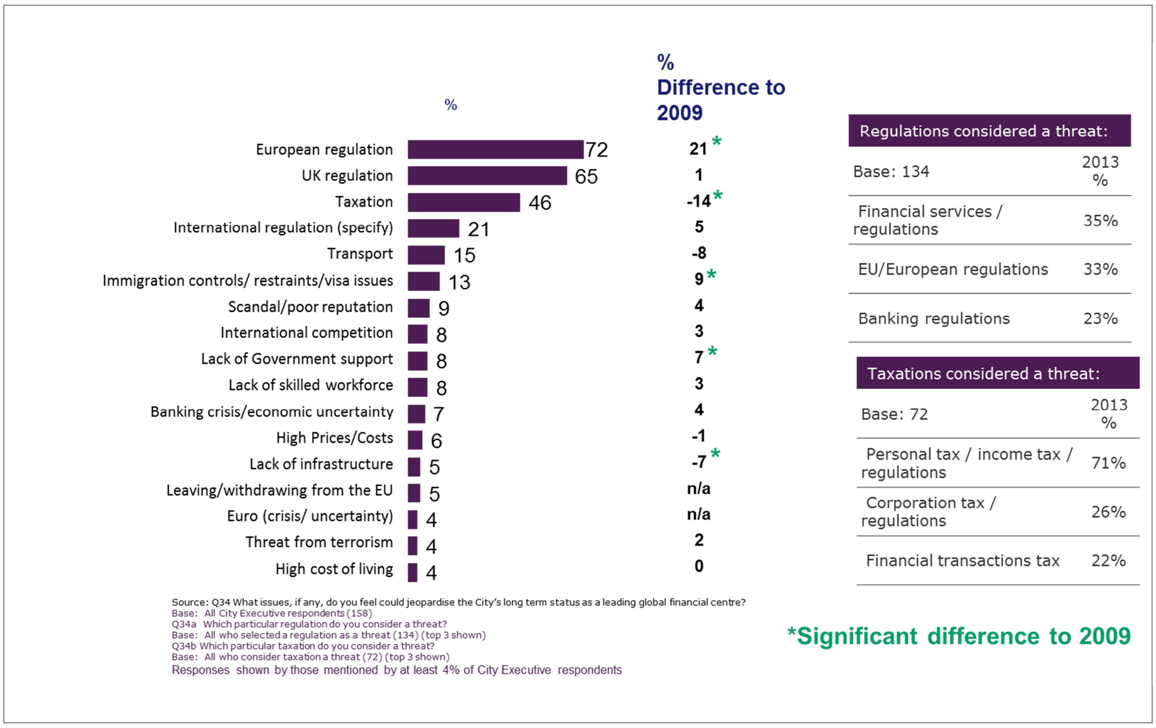
The issues which could threaten the City's long term status as a leading global financial centre were explored amongst senior City executives and are reported in detail in the individual report covering that group. Just the key points are reiterated here.

The number one potential threat raised by senior executives was financial/banking **regulation** – European (72%) or UK (65%) as opposed to international (21%). Their specific mention of European regulation increased by twenty one percentage points between 2009 and 2013.

The threat from **taxation** was mentioned by 46% of senior executives, in particular personal income tax.

Transport and **immigration controls/restraints/visa** issues also featured near the top of the list of threats (Chart 14).

Chart 14: What issues could jeopardise the City's long term status as a leading global financial centre



When asked specifically about business visitor visa arrangements, nearly half (47%) of senior executives were dissatisfied with current arrangements for business visitor visas for non-EU citizens.

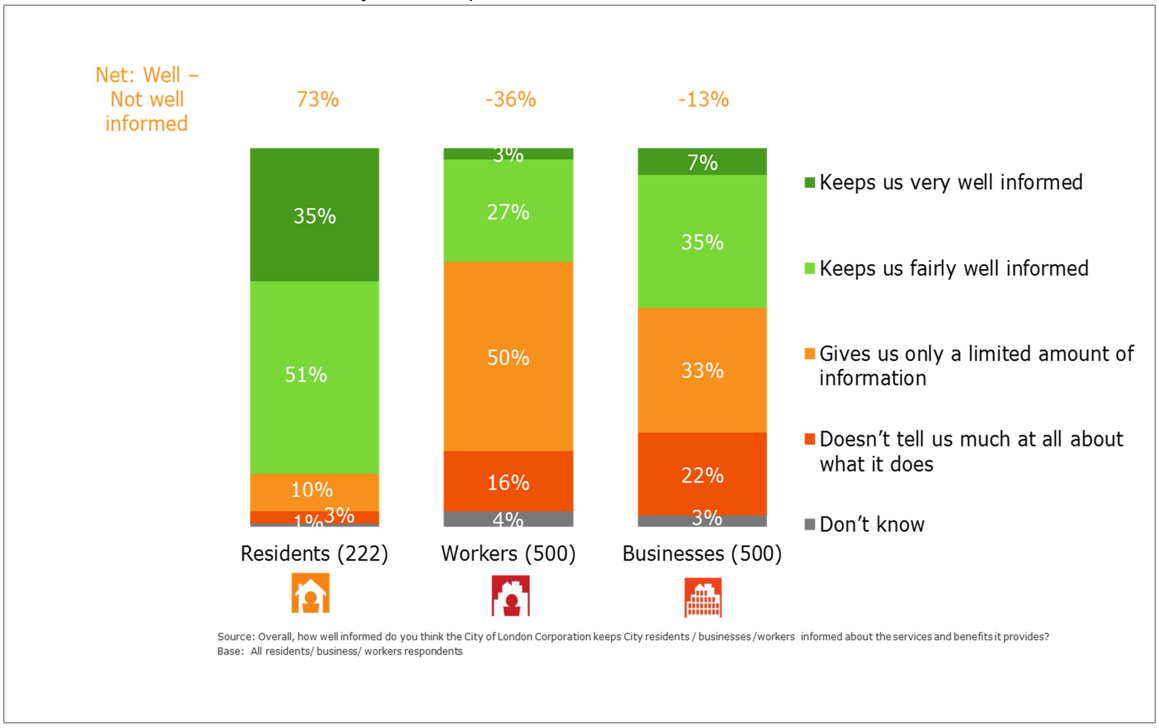
7. Communication & Contact

The role of the City of London Corporation in communicating with the four constituency groups was explored.

7.1 Keeping City residents informed

While the majority (86%) of City residents said the City of London Corporation kept them very well or fairly well informed, only a minority of workers (30%) and businesses (42%) said this (Chart 15). Senior executives were not asked this question.

Chart 15: How well informed by the Corporation



More City residents felt informed than did in 2009 (86% vs. 77%). The proportion of businesses feeling informed remained the same as in 2009. The proportion of City workers feeling informed was lower than in 2009 (30% vs. 36%).

7.2 Sources of information about activities

City residents, businesses and City workers tended to hear about the Corporation's activities in different ways. For residents, the key sources were the "City View" newsletter (47%) and mailshots/leaflets (40%).

City workers, on the other hand, primarily relied on free commuter newspapers for their information about the Corporation: Metro (23%) or Evening Standard (19%). They also cited personal experience of working in the City (23%). Like residents, businesses tended to hear about the Corporation through mailshots/leaflets (18%). However, their second most mentioned source was the Corporation's website (16%).

Chart 16: Sources of information about the Corporation's activities (top 10 mentions)

Residents (222)		City Workers (500)		Businesses (369)	
All respondents	%	All respondents	%	All respondents	%
City View newsletter	47%	Metro	23%	Mail shots/leaflets	18%
Mailshot/leaflets	40%	Experience (work in City)	23%	Through the CoL website	16%
City Resident	27%	Evening Standard	19%	Email from the CoL	10%
Through the CoL website	21%	Colleagues/contacts	12%	Newspaper/magazines	8%
Evening Standard	19%	Through the CoL website	8%	Colleagues/contacts (word of mouth)	8%
Libraries	16%	Other internet	8%	Direct mail	6%
Personal contact with CoL	16%	TV/Radio	7%	Other internet	6%
Metro	15%	City AM	7%	Evening Standard	4%
Experience (work in the City)	13%	Email from the CoL	6%	Personal contact with the CoL	3%
Colleagues/contacts (word of mouth)	13%	Newpapers/magazines	6%	Notice boards	2%

Source: From where, if anywhere, do you learn about the City of London Corporation's activities?

7.3 Preferred sources of information about activities

When asked their preferences, the most popular choices of communication channel about City of London Corporation's activities varied by constituency group.

Residents tended to prefer to stick with their most prevalent current sources, namely **mailshots/leaflets** (34%) and **City View** (28%). Email and the Corporation website were the next most popular choices (21% and 19% respectively), indicating that digital communications are preferred by some residents (Chart 17). The preference for these two digital channels was up by thirteen and eight percentage points respectively compared to 2009, so they have grown in popularity amongst this group.

City Executives' and **Businesses'** clear preference for hearing about Corporation activities was via email (52% and 45% respectively). This was followed in popularity by the website (28% and 22% respectively).

On the other hand, **City Workers'** preference was to continue to rely on Metro newspaper as their source of information about the Corporation's activities (30%). Email was the next most popular choice (19%).

Chart 17: Preferred sources of information about Corporation activities

Residents (222)		City Workers (500)		City Executives (149)		Businesses (369)	
All respondents	%	All respondents	%	All respondents	%	All respondents	%
Mailshots/leaflets	34%	Metro	30%	Email from the CoL	52%	Email from the CoL	45%
City View newsletter	28%	Email from the CoL	19%	Through the CoL website	28%	Through the CoL website	22%
Email from the CoL	21%	Evening Standard	18%	Newspapers/magazines	21%	Mailshots/leaflets	18%
Through the CoL website	19%	Through the CoL website	12%	City AM	16%	Direct Mail	14%
Direct Mail	10%	Facebook	11%	Evening Standard	11%	Newspaper/magazines	13%
City Resident	9%	TV/radio	9%	City View newsletter	10%	Other internet	12%
Evening Standard	6%	Advertising	9%	Mailshots/leaflets	9%	Eshots	4%
Personal contact with CoL	6%	Other internet	9%	Direct Mail	8%	Metro	3%
Facebook	6%	Newspapers/magazines	9%	TV/radio	7%	Evening Standard	3%
TV/radio	5%	Experience (work in City)	8%	Personal contact/experience	7%	Advertising	3%

Source: And from which two or three sources from this list, if any, would you prefer to learn about the City of London Corporation's activities?

7.4 Awareness of communications

There was relatively low awareness of either the Corporation's columns (Chart 18) or adverts (Chart 19) in City AM newspaper amongst any of the four groups surveyed, although awareness was higher amongst senior executives, who were the key audience. In general, the adverts tended to be better recalled than the columns. A third of senior executives had seen the columns, and just under three in ten had seen the adverts.

Chart 18: Awareness of City of London Corporation columns by Mark Boleat or Lord Mayor in City AM newspaper

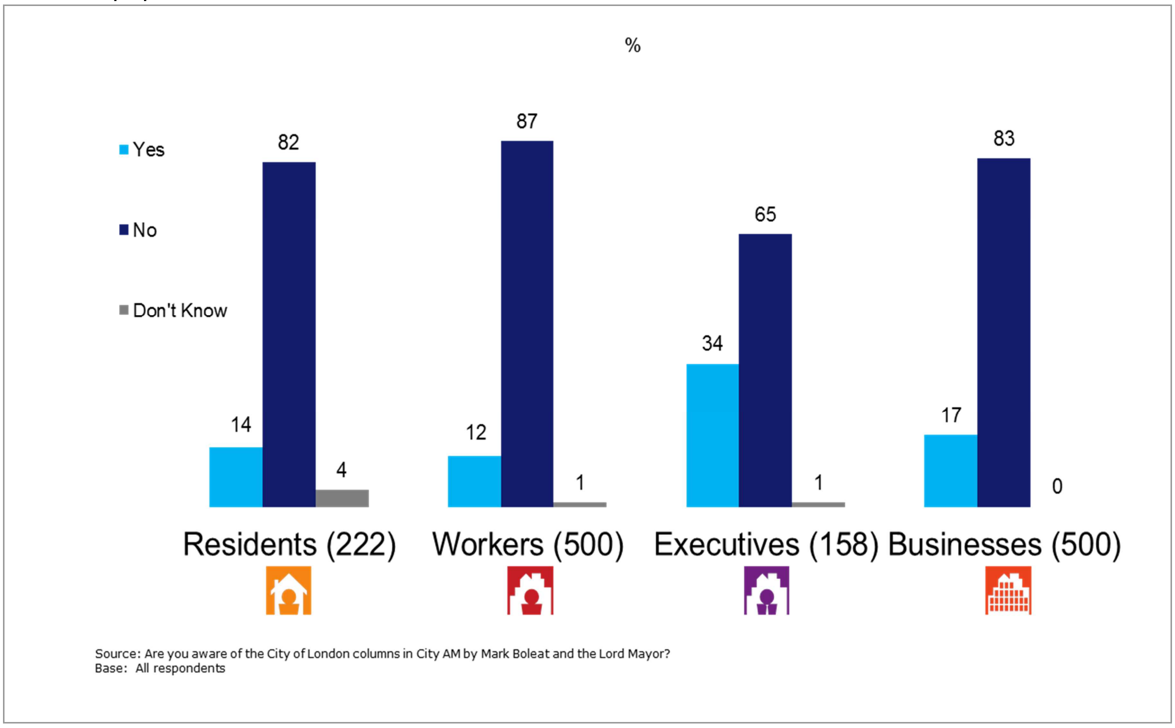
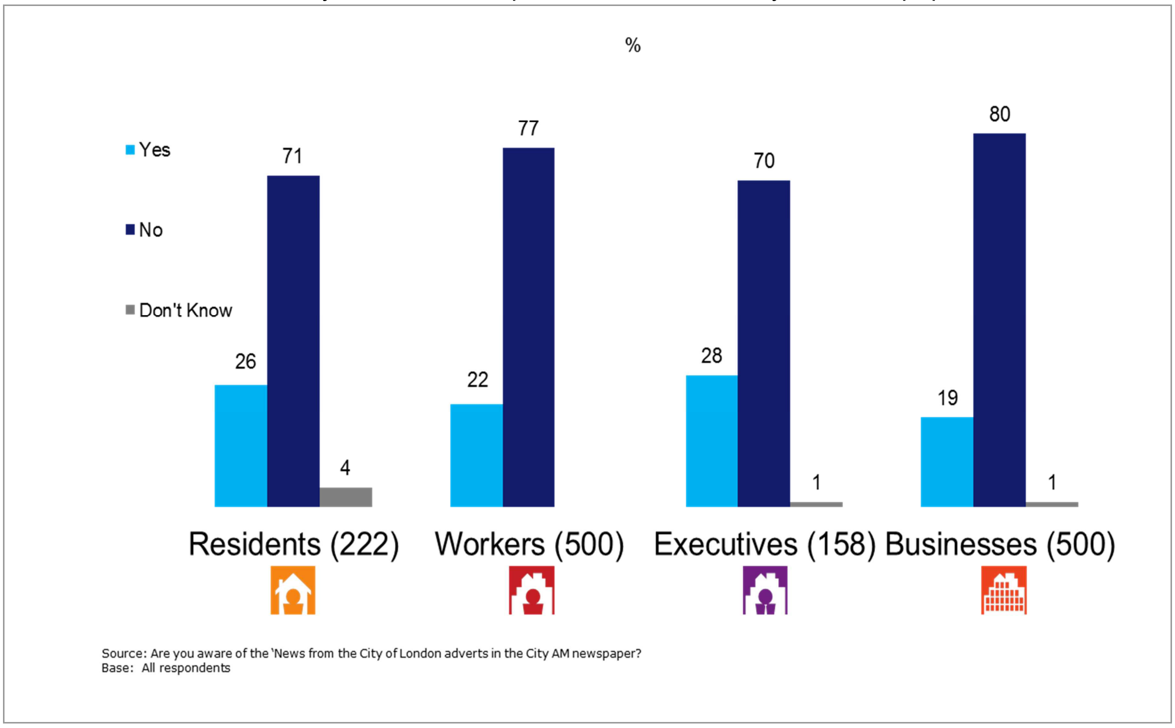


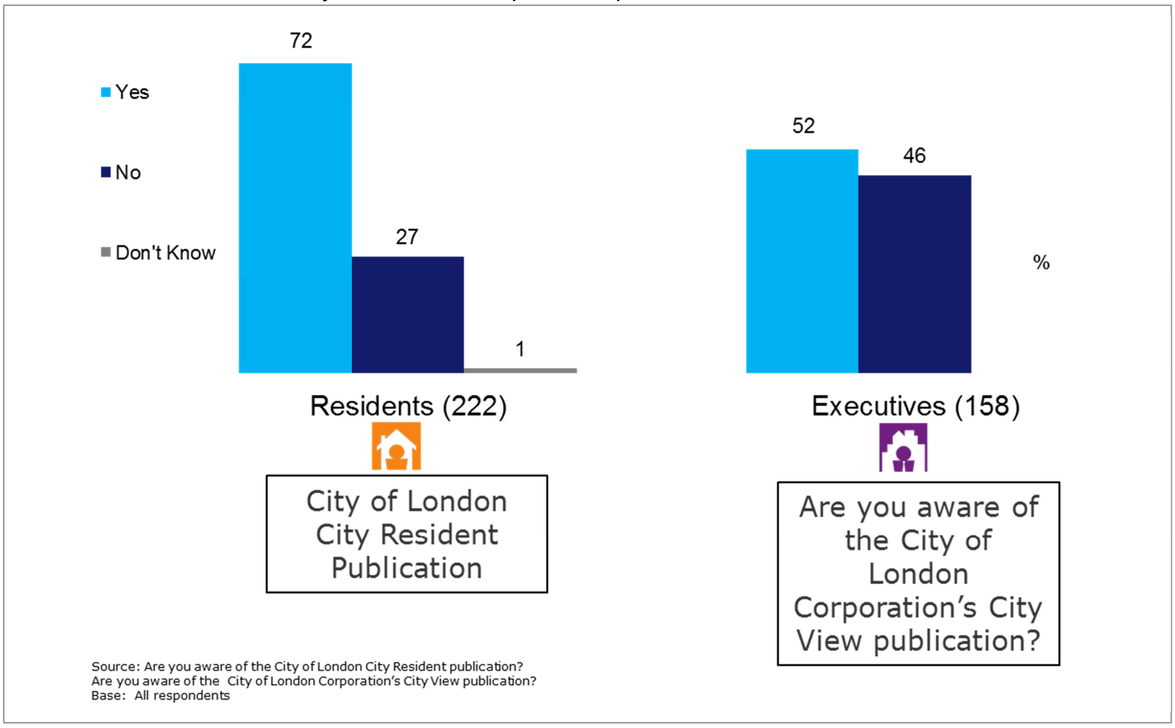
Chart 19: Awareness of City of London Corporation adverts in City AM newspaper



Awareness of specific Corporation publications aimed at residents and senior executives was much higher than of the City AM columns or adverts (Chart 20). Three-quarters of residents were aware of City Resident.

Half of senior executives were aware of City View. Charts 16 and 17 earlier in fact suggest that residents are keener on City View than on City Resident, although it is possible that they are muddling up these similarly titled publications. Chart 17 suggests that City View is not particularly popular among senior executives as a way of keeping informed about Corporation activities.

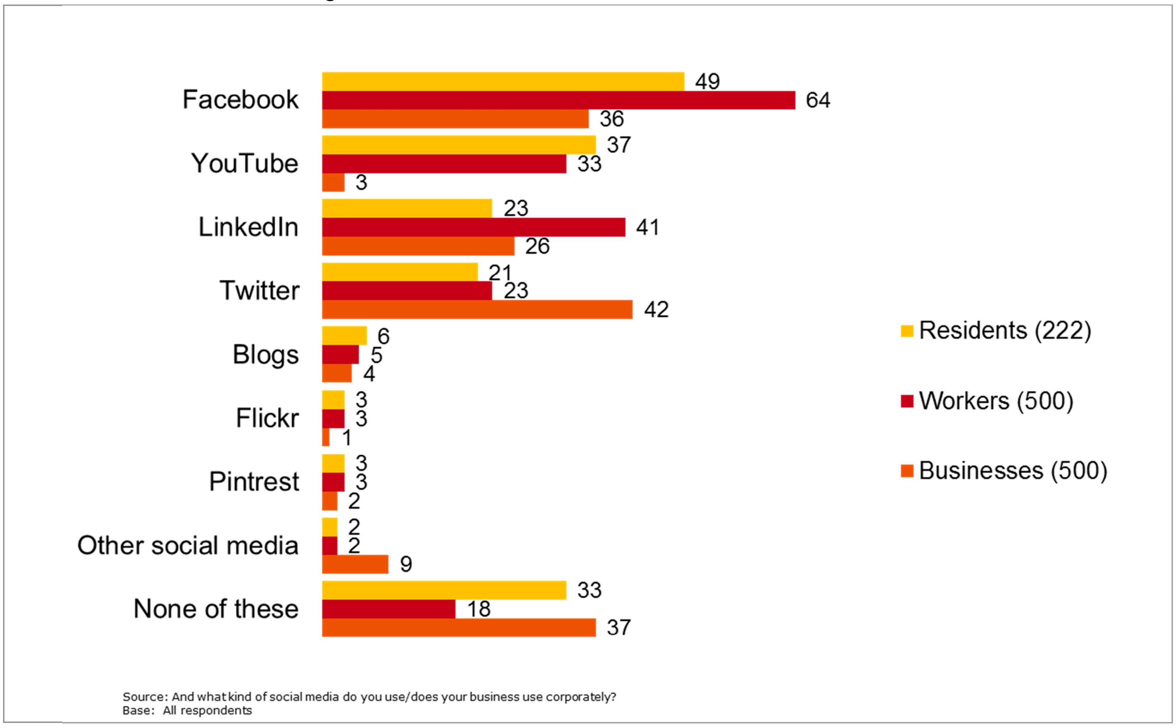
Chart 20: Awareness of City of London Corporation publications



7.5 Social media usage

Social media were widely used – either personally (residents, City workers) or corporately (businesses). For instance, two-thirds of City workers and half of City residents said that they use Facebook. A third of businesses do so corporately. Of any social media, businesses were most likely to use Twitter corporately (Chart 21).

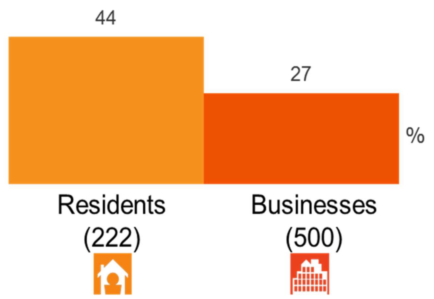
Chart 21: Social media usage



7.6 Contact with the Corporation

Around two-fifths of residents and a quarter of businesses had contacted the City of London Corporation in the past year. The majority of these contacts were by **phone** (51% for residents, 61% for businesses) and about a quarter were by **email** (Chart 22).

Chart 22: Whether and how had contacted the Corporation in the past year

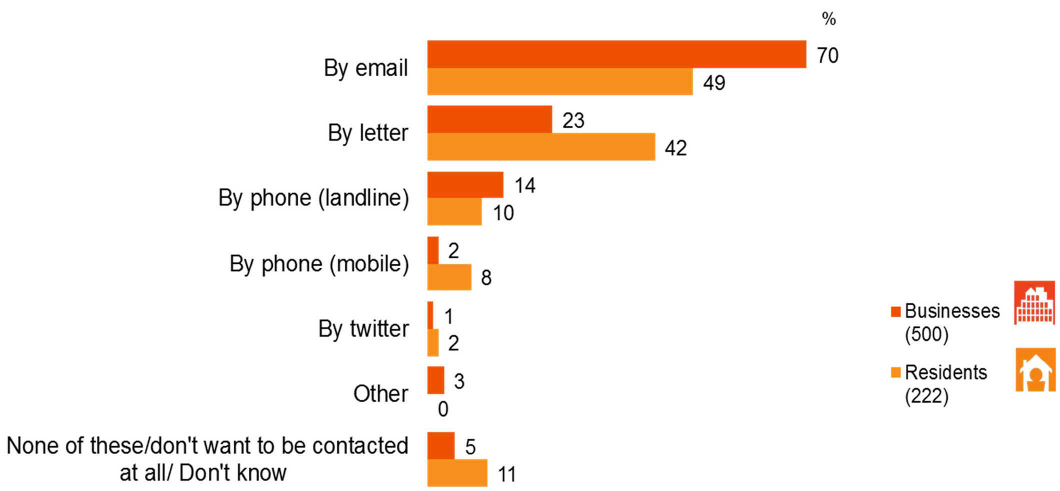


Those who had contacted did so by:	Residents (98)	Businesses (134)
Phone	51%	61%
Email	26%	27%
In Person	16%	5%
Letter	3%	5%
Internet / Website	3%	-

Source: Have you contacted the City of London Corporation in the past year or so, and how did you make your most recent contact with the City of London Corporation?
Base: All residents / business respondents

If the Corporation were contacting <u>them</u> in the future, businesses in particular tended to prefer to be contacted by email (70%). Residents were more evenly split in their preference between letter and email (Chart 23).

Chart 23: How would prefer to be contacted by the Corporation in the future

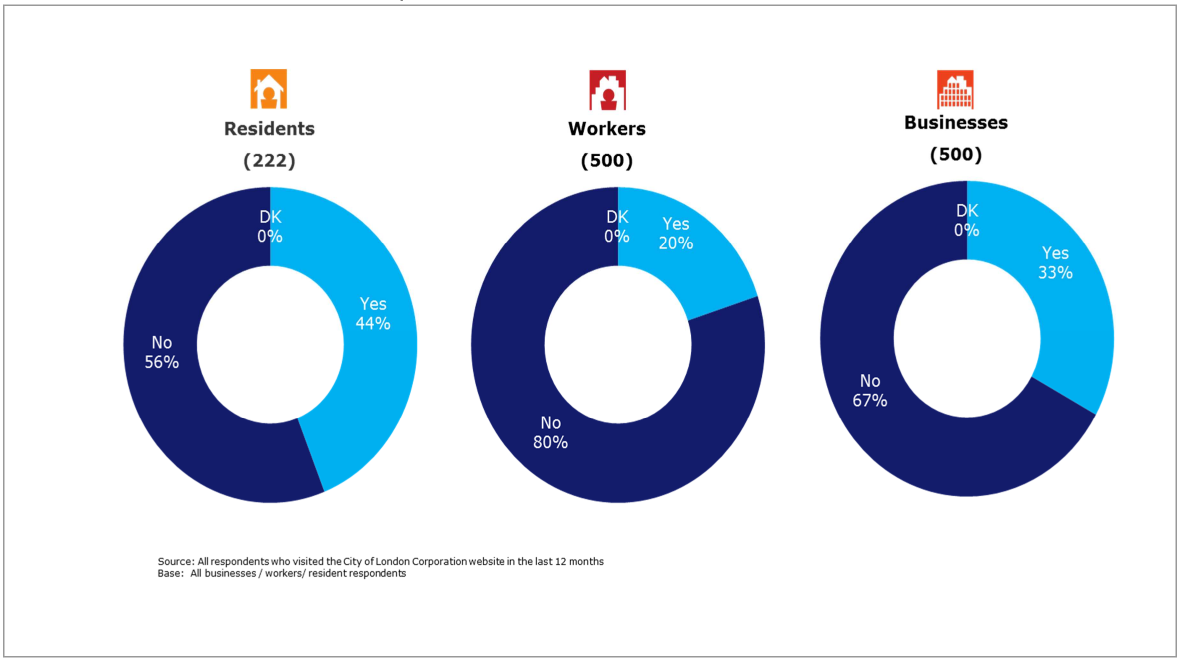


Source: How would you like to be contacted by the City of London Corporation in the future?
Base: All businesses / resident respondents

7.7 www.cityoflondon.gov.uk website

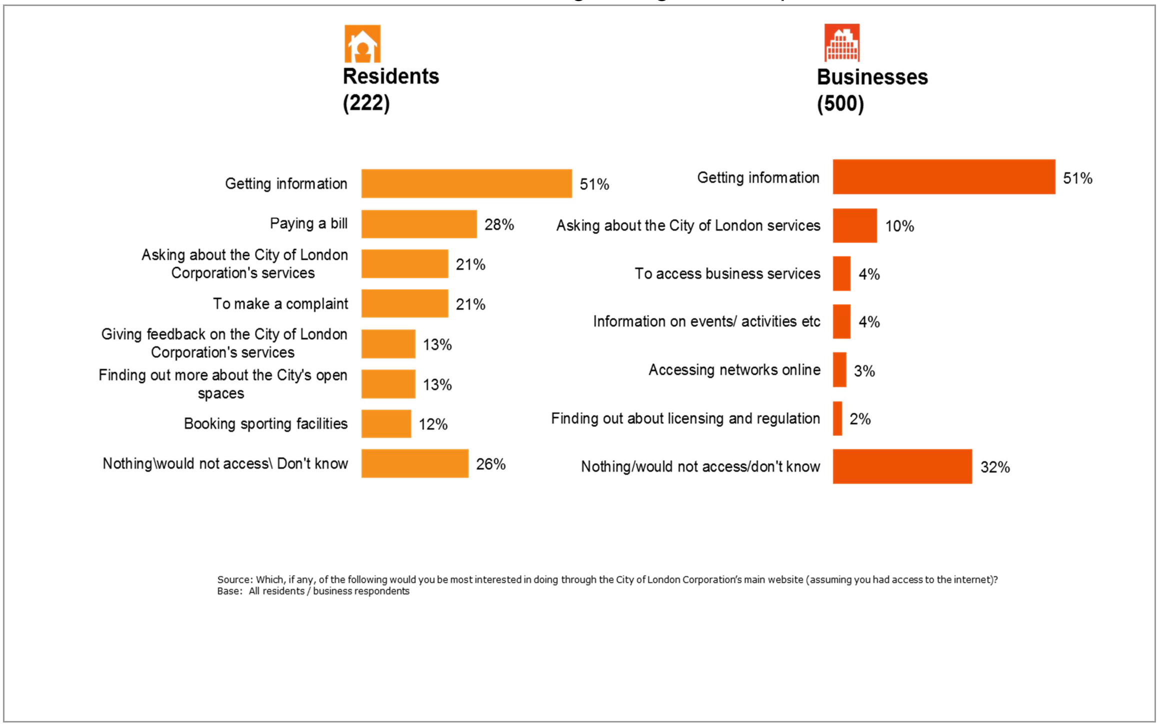
Residents were the group most likely to have visited the Corporation's website in the last 12 months, with two-fifths (44%) having done so. In comparison, only a third of businesses and a fifth of workers had visited the website (Chart 24).

Chart 24: Whether visited the Corporation's website in last 12 months



Both residents' and businesses' most commonly anticipated use of the Corporation's website was as a **source of information** (Chart 25).

Chart 25: What would be most interested in doing through the Corporation's main website



8. Implications

There are implications for both **policy** and **communications** arising from this research.

8.1 Policy

The key policy implications arising are around transport and promotion of the City's interests.

8.1.1 Transport

Whilst public transport access to/from the City is clearly one of the City's strengths, and satisfaction with transport has increased, City workers and/or businesses criticise its traffic congestion, parking, road works and public transport. A key priority for the Corporation's constituency groups remains making it as easy as possible for people to get to/from and around the City.

8.1.2 Promoting the City's interests

It is clear that businesses and senior executives expect the Corporation to promote the City's interests, and that they feel that the Corporation should do more in this respect. The issues which senior executives are most worried could threaten the City's long term status as a leading global financial centre are European financial/banking regulation, personal taxation, transport and immigration controls and visa restrictions.

8.2 Communications

The key implications arising for communications are around which constituency groups there is greatest scope to influence more positively, and whether current communication channels are optimal.

8.2.1 City businesses and workers

Businesses and workers are the groups least familiar with the Corporation, least satisfied with how it runs things, and least likely to think that it provides value for money. These are therefore the groups amongst which there is most scope to improve perceptions of the Corporation.

8.2.2 Communication channels

There is an appetite amongst residents, businesses and workers to receive information about the Corporation's activities digitally, including receiving correspondence on an individual level by email.

This willingness to engage digitally suggests that there is potential to send e-newsletters alongside or instead of the current paper-based publications, and also to tap into widespread social media usage. The fact that the Corporation's newsletter for residents is currently the channel they most commonly use to keep up to date with the Corporation's activities suggests that an e-equivalent might be well received.

The Corporation's adverts and columns in City AM newspaper are reaching senior executives, but other methods of interaction should be considered to reach other audiences. Workers' preferred medium for news about the Corporation's activities is Metro newspaper. If the Corporation retains a newsprint medium, Metro or Evening Standard would be a better bet in reach terms.