Committee: Policy and Resources	**Date**: 10 October 2013
Subject: Results of triennial opinion polling of the City of London Corporation's key audiences	
Report of: Director of Public Relations	**Public** **For Information**

Summary

This report summarises the results of the latest polling of key audiences (senior City executives, City businesses, City workers, and City residents) commissioned by the City of London Corporation, and conducted by TNS between April and June 2013.

The City of London Corporation has conducted comprehensive, triennial surveys of its key audiences since 2000. These surveys are used to ascertain attitudes and perceptions amongst a cross-section of our key audiences and stakeholders as identified in successive *Communications Strategies*; the results, once analysed, inform the organisation's strategic planning, communications strategy, and service delivery.

Chief Officers will consider any appropriate recommendations for their service Committees and the outcome of this process will be brought to your Committee in due course

Recommendation

The Committee is recommended to note the contents of this summary Report of findings and key issues arising, plus the longer report compiled by TNS which has been circulated separately as *Appendix 1* to this report.

Introduction

1. The City of London Corporation has conducted comprehensive, triennial surveys of its key audiences since 2000 (and one audience – senior City executives – for considerably longer). These surveys were undertaken by Ipsos MORI until 2006 and by TNS in 2009. These surveys are used to ascertain attitudes and perceptions amongst a cross-section of our key audiences and stakeholders as identified in successive *Communications Strategies*; the results, once analysed, inform the organisation's strategic planning, communications strategy, and service delivery.

2. The latest survey series were due to take place in 2012, but it was decided to delay the fieldwork for a year to avoid a clash with the Queen's Diamond Jubilee and the Olympic and Paralympic Games. A tendering process was carried out between January and February 2013 and the contract was awarded to TNS, the leading international market research agency which is part of WPP Group plc.

3. Polling was conducted by TNS between April and June 2013. As previously, four separate extensive polls were undertaken of the City's key audiences: senior City executives, City businesses, City workers and City residents.

4. A presentation to Members of the survey results is due to be made by TNS after the December meeting of the Court of Common Council. There will also be an opportunity for Members to ask questions after the presentation.

Summary of key findings

5. <u>Attitudes to the City of London</u>

   - Satisfaction with the City of London as a place to live/work/run a business remains high, with over nine in ten satisfied with the local area across all four audiences (net satisfaction levels are 93% with residents, 89% with workers, 93% with senior executives, and 89% with businesses). Satisfaction amongst businesses has increased significantly since 2009 (84% to 93%), while the changes for the other audiences were not significant.

   - Traffic congestion and public transport/commuting are seen as key priorities by both businesses and workers to improve the City of London as a place to do business/work.

6. <u>Attitudes to the City of London Corporation</u>

   - The majority of all four audiences are satisfied with the way the City of London Corporation runs things; satisfaction is highest amongst residents (87% satisfied with 5% dissatisfied) then senior executives (85% versus 1 %) then workers (75% versus 3%) and businesses (69% versus 5%). There have been no significant shifts in satisfaction since 2009.

   - The perception of 'value for money' follows a similar trend: 73% of residents believe the Corporation offers value for money compared to 9% who believe that it does not; for senior executives the figures are 61% and 2%; for workers the figures are 49% and 10%; and, for businesses the figures are 40% and 12%. This is a new question.

   - Continuing this pattern, familiarity with the City Corporation is highest amongst residents where 67% know it very well or a fair amount; this compares to 51% for senior executives, 36% for workers and 29% for businesses. The business figure is a significant fall from the 39% measured in 2009.

   - A logical explanation for the fall in business's familiarity with the City Corporation is the large number of new businesses in the City, as there is a correlation between familiarity with the City Corporation and the number of years a business has been established here. Worryingly, for businesses that have been in the City less than 5 years, only 12% felt that they knew the City Corporation very well or a fair amount whereas, 44% felt they did not know it at all.

   - When asked whether they felt that the City Corporation's role in promoting the City and representing its interests at home and abroad should be increased, decreased or remain the same, 59% of senior executives and 61% of businesses felt it should be increased, 39% of senior executives and 31% of businesses felt it should remain the same. No senior executives and only 1% of businesses felt it should be decreased. 87% of senior executives felt that the role of the Lord Mayor was very relevant or fairly relevant compared to 11% who felt that it was not very relevant or not at all relevant.

7. Satisfaction with specific services

This table summarises the significant changes in satisfaction with City Corporation and non-City Corporation services since 2009:

	Significant increase in satisfaction (2013 figure)	**Significant decrease in satisfaction (2013 figure)**
Residents	London Underground +10% (89%) Train Services +11% (85%)	Archives -15% (19%) Libraries -11% (69%) Environmental health -10% (54%) Adult Education -10% (28%) Consumer protection/trading standards -10% (24%) Youth Activities -10% (16%)
Businesses	London Underground +21% (87%) Recycling +11% (57%) Shopping Facilities +7% (85%)	Libraries -12% (34%) Open Spaces -7% (70%) Adult Education -7% (26%)
Workers	Shopping Facilities +9% (83%) Museum of London +8% (65%)	Open Spaces -8% (62%)
Senior Executives	London Underground +26% (76%) Barbican Centre +19% (68%) Shopping Facilities +13% (79%) Other support for the Arts +13% (79%) Train Services +12% (68%) Bars & Restaurants +8% (95%)	

- The only service to record a negative net satisfaction rating was public conveniences (-14% for workers and -12% for businesses). This is a new question that was not asked in 2009.

- Additional analysis was performed by postcode to see if there was any geographical explanation for the falls in satisfaction; however, there were no significant geographical explanations. TNS were very keen to point out that, while there have been some falls in satisfaction with services, the figures are actually very good when compared to similar results from other local authorities.

8. Communication Channels

How City residents, workers, and businesses learn about City of London activities:

City Residents	**City Workers**	**City Businesses**
Cityview (47%)	Metro (23%)	Mailshots (18%)
Mailshots (40%)	Experience of working in the City (23%)	City Corporation website (16%)
City Resident (27%)	Evening Standard (19%)	City Corporation emails (10%)
City Corporation Website (21%)		

- These figures are broadly similar to those observed in 2009.

How City residents, workers, businesses, and senior executives would prefer to learn about City of London activities:

City Residents	**City Workers**	**City Businesses**	**Senior Executives**
Mailshots (34%)	Metro (30%)	City Corporation emails (45%)	City Corporation emails (52%)
Cityview (28%)	City Corporation emails (19%)	City Corporation website (22%)	City Corporation website (28%)
City Corporation emails (21%)	Evening Standard (18%)	Mailshots (18%)	Newspapers (21%)
City Corporation website (19%)			

- The proportion preferring email has increased for all audiences since 2009.

9. City Competitiveness

- New York remains the city seen as the main competitive challenge to the City of London; 41% of senior executives consider it 'a great challenge'. Singapore and Hong Kong are more likely to be seen as competitive challenges than in 2009, with 23% considering Singapore and 17% considering Hong Kong as 'a great challenge'. In addition, many senior executives expect their firms to conduct more business with Asian markets in the next five years, in particular Hong Kong (27%) and Singapore (37%).

- Regulation is the main issue executives feel may jeopardise the City's long term status as a leading global financial centre, with 72% mentioning European regulation (an increase of 21% from 2009) and 65% mentioning UK regulation. Taxation is also seen as a concern by nearly half (46%), but less so than in 2009 (down 14%).

- There has been a significant rise in the number of senior executives who feel that immigration controls/visa issues could jeopardise the City's long term status – up 9% to 13%.

10. Policy issues

- In response to the question 'If Britain was to vote to leave the EU, what impact would that have on your business here in the City of London?', 69% of senior executives feel that the UK leaving the European Union would have a negative impact on their business in the City of London, compared to 9% who feel it would have a positive impact. 14% thought that it would have no impact and 8% did not know.

- 23% of senior executives are satisfied with current arrangements for businesses visitor visas for non-EU citizens, compared to 47% who are dissatisfied. 23 % were neutral and 7% did not know.

Key Issues

11. The key issues arising from the polling can be summarised as follows:

i. Analysis by postcode showed that there was no clear geographical explanation for the decline in satisfaction with some services since 2009. The pollsters TNS were very keen to point out that, while there have been some falls in satisfaction with some services, the figures are actually very good when compared to similar results from other local authorities. However, it would be appropriate to examine further as far as possible the reasons for these changes.

ii. The only service to record a negative net satisfaction rating was public conveniences (-14% for workers and -12% for businesses). While a scheme does exist that allows the public open access to lavatories in bars and pubs it is clear that efforts to further publicise and raise awareness of the scheme need to be redoubled.

iii. The awareness that businesses have of the City Corporation has fallen since 2009 with 29% feeling they know it very well or a fair amount compared to 39% in 2009. A logical explanation for the fall in business's familiarity with the City Corporation is the large number of new businesses in the City, as there is a correlation between familiarity with the City Corporation and the number of years a business has been established here. Worryingly, for businesses that have been in the City less than 5 years only 12% felt that they knew the City Corporation very well or a fair amount, whereas 44% felt they did not know it at all. The City Corporation needs to give further consideration to how it engages with businesses as they newly become established in the City.

iv. The proportion saying that they would prefer contact with the City Corporation by email has increased significantly for all audiences since 2009. A study should be carried out by officers into how this could best be achieved.

Work will be undertaken by officers in each of these area and appropriate recommendations will be submitted in due course to this Committee and relevant Service Committees.

Conclusion

12. The results of this tracking research, in detailed form, will contain findings relevant to many areas of the City Corporation's work. It will be important for Chief Officers and Departments

to examine the results carefully, so that the necessary conclusions can be drawn and any appropriate recommendations for Committees can be prepared. Chief Officers will consider any appropriate recommendations for their Service Committees and the outcome of this process will be brought to your Committee in due course.

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