

Annual London Survey 2015

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1 Introduction

The 2015 Annual London Survey, fielded throughout November of that year, saw 3,861 Londoners share their views on what makes London a great place to live and where improvements can be made.

London is changing. The expanding service-led economy, new and increasing wealth and consumption practices, and more leisure time for many of its residents indicates that the city needs to provide more than the basics of urban life. As the population grows and tastes and preferences change, services and opportunities too must expand to serve these. London keeps up with these changes and challenges through an expansive range of amenities that facilitate a balance between the everyday and the extraordinary.

Inevitably, there are problems with life in London. City Hall policy makers are largely aware of these and already work on a range of interventions to address them. These elements of London life are frustrating for residents; however the 2015 London Survey has revealed to us that these problems do not determine overall satisfaction with the city. London remains a highly attractive and satisfying place to live¹, still situated at the head of the table of global cities. The findings of the 2015 London Survey has revealed the importance of London's unique selling points for enabling Londoners to enjoy and benefit from life, work and leisure in the city, providing fulfilled lives and unrivalled opportunity.

As a framework for this piece of research we have adopted the 'consumer city'² or 'amenity city'³ theory, which stipulates that amenity cities – those with high-level advanced services and opportunities – show levels of demand to live in these centres increase in spite of the high cost of living. This becomes particularly important as cities attract higher numbers of skilled workers, leading to changes in social capital, and changing tastes with improvements in personal financial or economic situation. This understanding of a new civic norm aptly explains the importance of London's unique selling points of architecture and urban heritage, culture and sport, and innovations in transport, in driving overall satisfaction in the face of ongoing and mounting problems with other aspects of London life.

With the overall aim of the research to offer reflections and opinions on the work of City Hall, and understand how intervention can impact overall quality of life in the city, the following research questions were adopted:

- To what extent are Londoners satisfied with their lives in London, and what drives this level of satisfaction?
- What do Londoners think are the most important elements of life in the city for creating a successful and fulfilling place to live and work?
- What does the balance of satisfaction and relative importance of different aspects of London life mean for experience and enjoyment of the city?
- What can be done to best improve the overall outlook on life in London?

¹ Pricewaterhouse Coopers (2014) 'Cities of Opportunity'. Accessed Online [22/02/2016]: <http://www.pwc.com/us/en/cities-of-opportunity.html>

² Glaeser, E. L., Kolko, J. and Saiz, A. (2000) 'Consumer City' Working Paper 7790, NBER Working Paper Series. National Bureau of Economic Research, MA

³ Ahfeldt, G. (2011) 'The Hidden Dimensions of Urbanity' LSE, Department of Geography and Environment & Spatial Economics Centre (SERC). Accessed Online [15/01/2016]: <http://www.ieb.ub.edu/aplicacio/fitxers/WS12Ahfeldt.pdf>

This report first outlines the methodology, and then provides an overview of Londoners' satisfaction and dissatisfaction with London. The paper then gives details on findings by policy area, outlining strengths and weaknesses, and offering recommendations and opportunities for further research. Discussion then makes sense of these policy areas holistically, outlining their interdependence and how they coalesce to create an overall sentiment towards life in London. We then consider the longevity of this sentiment, where threats to the balance or 'tipping points' might emerge, and the governance and policy opportunities that can be exploited to overcome them.

2 Methodology

2.1 Research design and outreach

This is the second London Survey conducted through Talk London for City Hall. The survey was conducted by the GLA's Opinion Research and Statistics team (ORS) online between 3rd November and 1st December 2015. The results are based on the survey responses of 3,861 Londoners aged 18+.

The survey was promoted on the City Hall and TfL websites, and outreach undertaken via a number of known databases and via City Hall social media accounts.

Participants were self-selecting; however robustness was maintained through achieving a minimum number of responses from each demographic group to allow for indicative demographic comparisons to be drawn. The data was weighted by age, gender and ethnicity to accurately *reflect* London's population based on ONS data.⁴ The sample was not weighted by education or tenure, and personal social-economic data was not collected. It should be remembered that this is a self-selecting sample, and not the entire population of Greater London has been interviewed.

2.2 Analysis

Divided into seven policy areas, the survey asked about satisfaction with particular elements of London life, and the importance Londoners assign to each of these issues. Through this design we were able to run statistical analysis to reveal key drivers of satisfaction showing the relationship between satisfaction with policy issues and overall satisfaction with life in the capital.

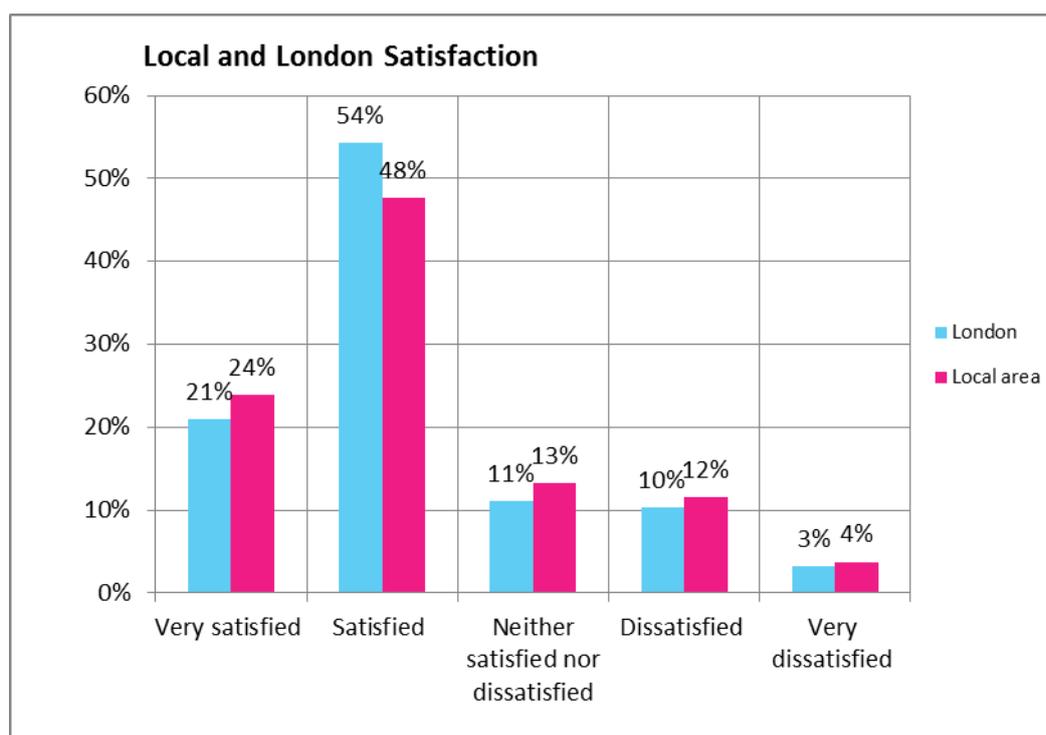
Qualitative data was thematically coded by TNS Research Ltd, and further analysed by the ORS team. Coding was undertaken on 1500 responses, sampled by shuffling the data and selecting every nth response with a word count greater than 4.

⁴ Office for National Statistics Annual Population Survey 2014

3 Satisfaction and priorities: An overview

Satisfaction with London as a place to live is high, with 75% of respondents satisfied with the city, 21% of whom are very satisfied. Similar levels of satisfaction are noted for local areas. This is an encouraging report on London governance at both regional and local levels, and is consistent with findings from previous years, despite changes to other aspects of London life, such as the growth in population and increasing house prices⁵.

Figure 1: Satisfaction with London and local areas



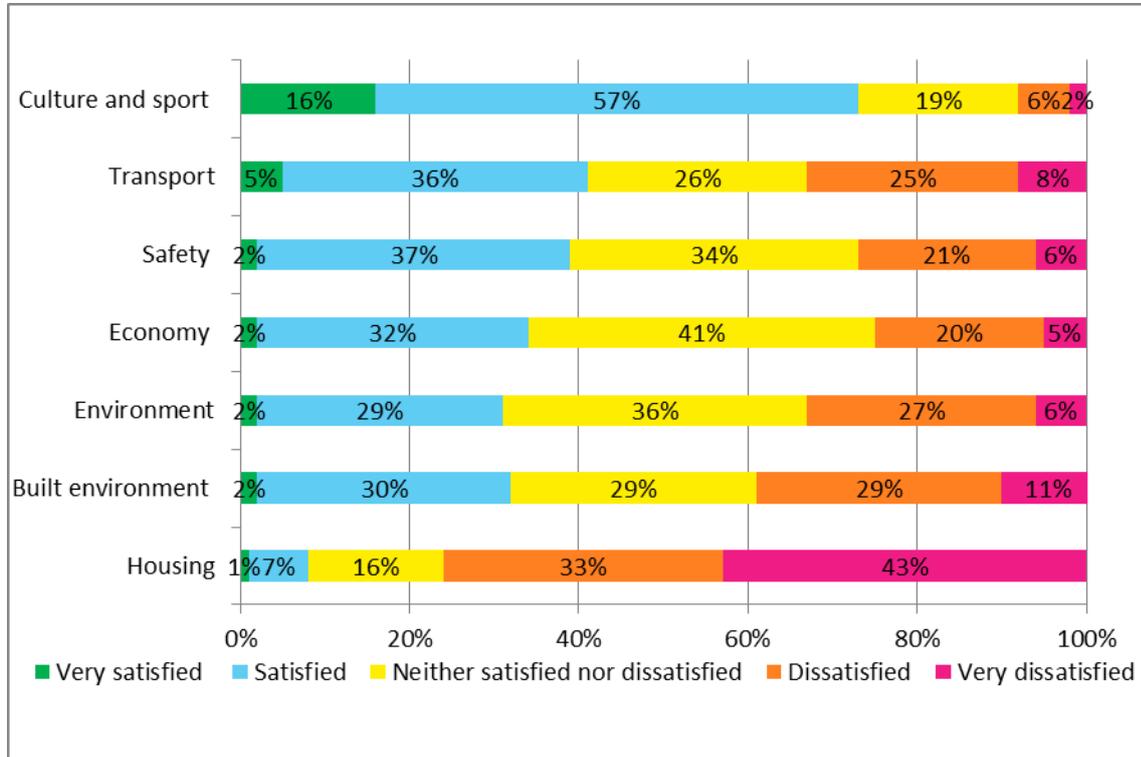
Reflective of satisfaction with local areas, community relations also fare well, with the majority of Londoners recognising good relations between ethnic and religious groups (57%), and between older and younger people (46%). Generally people feel they experience good neighbourly attitudes (57%), and feel part of a community and the wider city (42%).

Survey findings show some significant demographic divides, which though unsurprising, offer evidence for policy development. The most significant of these were noted between tenure and ethnicity, with social renters (20%) and minority ethnic groups (16%) more likely to be dissatisfied with London in general. Compared to their dissatisfaction with London (10%), younger people are more likely to be dissatisfied with their local areas (16%), likely a result of the combination of transient short-term tenures which may prevent them from becoming part of the community, balanced with the allure or shine of wider London life, which they may consider to be more appealing.

⁵ Department for Communities and Local Government, Land Registry (2015) 'Average House Prices' [Online]: <https://www.gov.uk/government/organisations/department-for-communities-and-local-government/series/housing-market>

Satisfaction with Mayoral policy areas is mixed, the majority show split opinion with similar numbers satisfied and dissatisfied, while satisfaction with culture is very high at 73% and very low for housing, at only 8%.

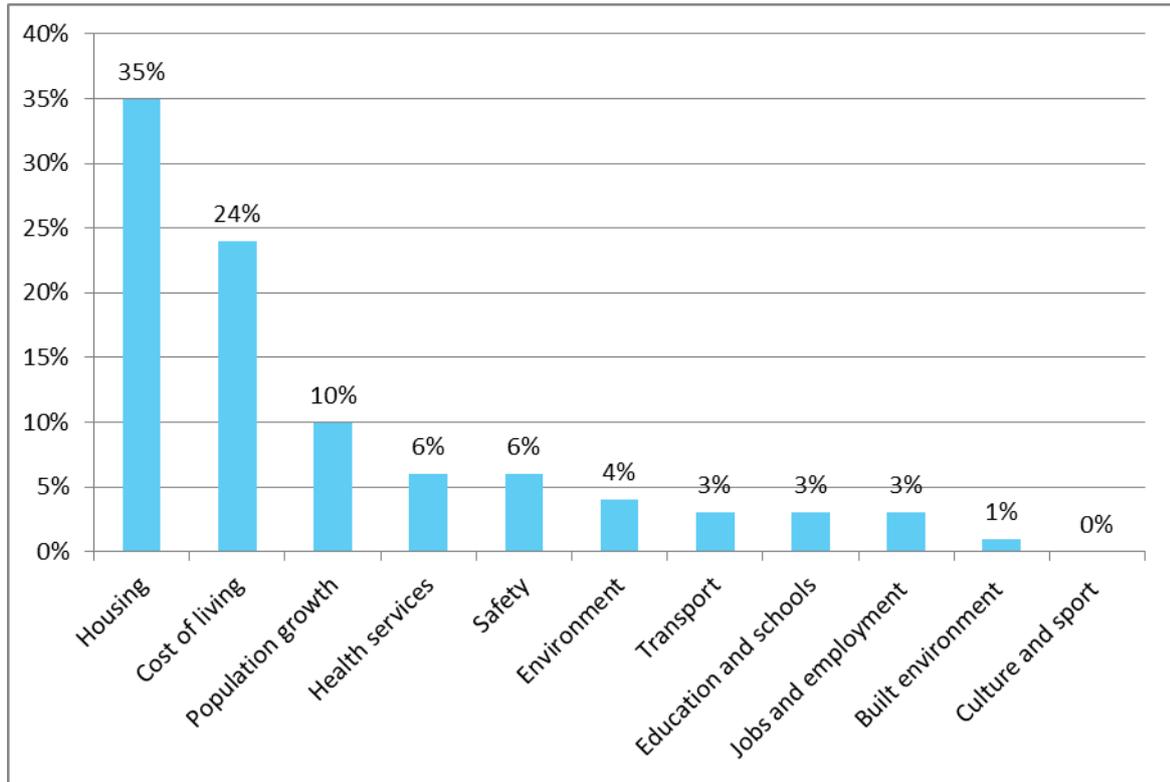
Figure 2: Satisfaction with Mayoral Policy Responsibilities



This more detailed picture of satisfaction shows a disconnect with the high public satisfaction with life in London we’ve already discussed, indicating that there may be more complex interactions between policy issues. Some may be more important than others in enabling people to live fulfilling lives and there may be some areas in which people are willing to accept a poorer offer in exchange for a better offer in something else.

Statistical analysis suggests that currently satisfaction with the built environment, culture and transport have the most significant bearing on satisfaction with London, while issues like housing and the environment are less important. This helps explain the high satisfaction with London despite discontent in certain areas. It is suggestive, for example, of a population currently willing to accept more expensive housing that might not tick every box, for the opportunity to access the extraordinary cultural offer London has. However, it fails to tell us at what point the opportunities will no longer outweigh the costs.

Findings on public priorities further this narrative and point to a future where costs such as housing and affordability may more than outweigh opportunities in London. Londoners overwhelmingly state housing as the number one issue facing the capital today, with cost of living and population growth (both intimately related) close behind. The weight given to all other issues was relatively low, underlining the urgency of the top three.

Figure 3: Londoners' top-ranked issues facing London today

Throughout the remainder of this report, these ideas are explored further by considering the disparities between satisfaction with and importance of policy and governance that impact day-to-day life in London, and the city's unique selling points that contribute to making the London offer extraordinary.

4 Findings by policy area

The following considers the specific findings of each policy area covered by the London Survey. Satisfaction, priorities, the findings of the statistical analysis and demographic insight are discussed for each area, followed by some short recommendations for action and further research.

An omission from the survey itself is a discrete section on public health. In this context, the survey looked at issues of public health within other policy areas, such as the environment, culture and sport, and the built environment. Findings of relevance to public health have been noted in the relevant policy area below⁶.

4.1 Planning and Regeneration: Building a London for the future

As we saw in Fig. 3, Londoners don't currently prioritise planning and regeneration issues over and above other policy areas. Rather, housing, the cost of living and population growth are at the top of the list. However, analysis of the survey data suggests that satisfaction with planning and regeneration is strongly and positively related to Londoners' satisfaction with the capital.

4.1.1 Satisfaction

Satisfaction with planning and regeneration overall is mixed, with 32% satisfied, 39% dissatisfied and 29% neither satisfied nor dissatisfied – indicating that there is room for improvement.

Results of questions on the satisfaction with the built environment indicate a divide between two areas within it: Aesthetic and functionality. Policies which pertain to the attractiveness of the city, and London's unique identity were looked upon considerably more favourably than day-to-day planning issues. Most notably the attractiveness of public spaces and the design of new development had relatively high satisfaction levels compared to other areas of the built environment, at over 40%. As well as being significant for the built environment, this is an important finding for health as public spaces help promote good mental health and facilitate activities that improve physical health.

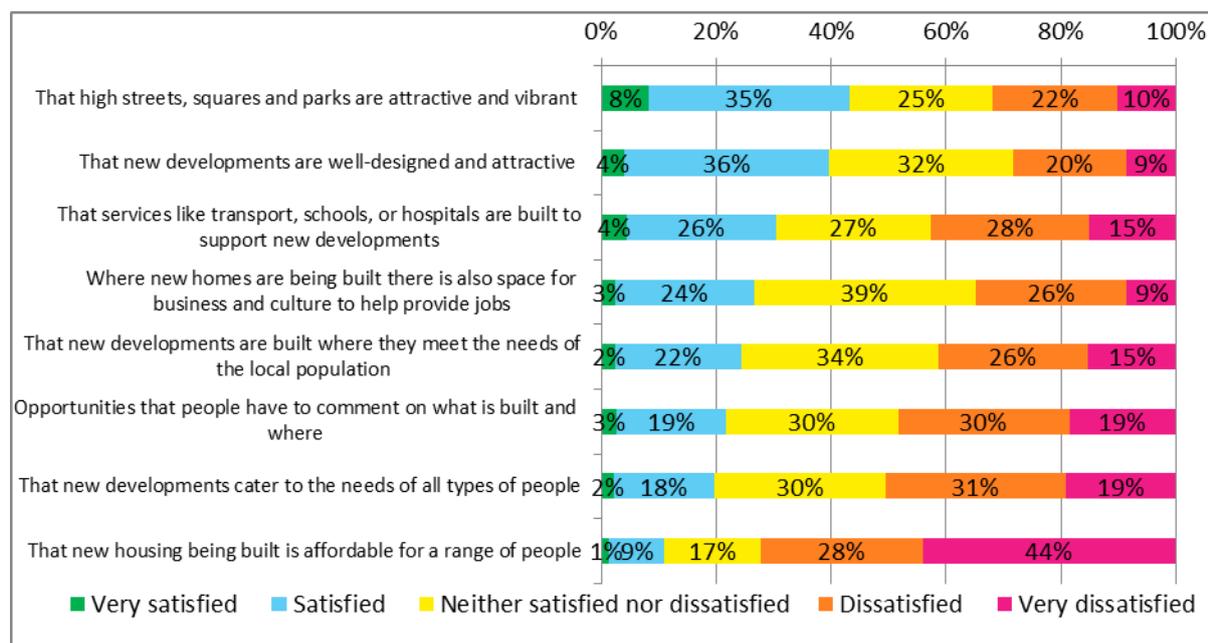
Housing provision, the extent to which developments cater to the needs of people, opportunities to participate in planning and regeneration decisions, and service capacity – the latter three forming the bread and butter of local government planning decisions – all received high levels of dissatisfaction, at 72%, 50%, and 49% respectively⁷.

⁶ For more information on public opinions on public health in London, findings of the 2014/15 London Health Commission engagement can be seen online at: <http://www.londonhealthcommission.org.uk/>

⁷ Issues pertaining to the built environment also received high numbers of participants selecting 'neither satisfied nor dissatisfied' – usually between one-quarter and one-third. This may be due to the sophistication of many of the issues asked about, which lay people may not consider in their day-to-day lives. This distorts results in some capacity and so has been considered in analysis and recommendations.

Figure 4: Satisfaction with the built environment by policy issue

(NB. 'Don't know' responses have been excluded)



This divide between aesthetic and functionality was also highlighted in responses to open-ended questions, in which many participants referred to the unique design of London's built environment as one of the best things about the city, with one respondent stating that London has "heritage like no other major city, balanced with new and modern architecture". Others espoused concern for the future capacity of the built environment, with comments such as: "Infrastructure and housing has not and cannot keep up with massive population growth".

Many qualitative responses made reference to issues to do with foreign investment, vacant possession and supply and demand problems with offices and housing alike, none of which were asked about in the survey. As one respondent wrote: "[The worst thing about London is] the influx of private developers building luxury housing for non-Londoners is pushing up property and service prices and forcing Londoners out of the city", with another adding: "There is too much investment from overseas – too many blocks of flats that are bought by investors and left empty. That doesn't make a good city." Comments like these indicate a need for more research around Londoners' understanding of growth and development.

4.1.2 Priorities

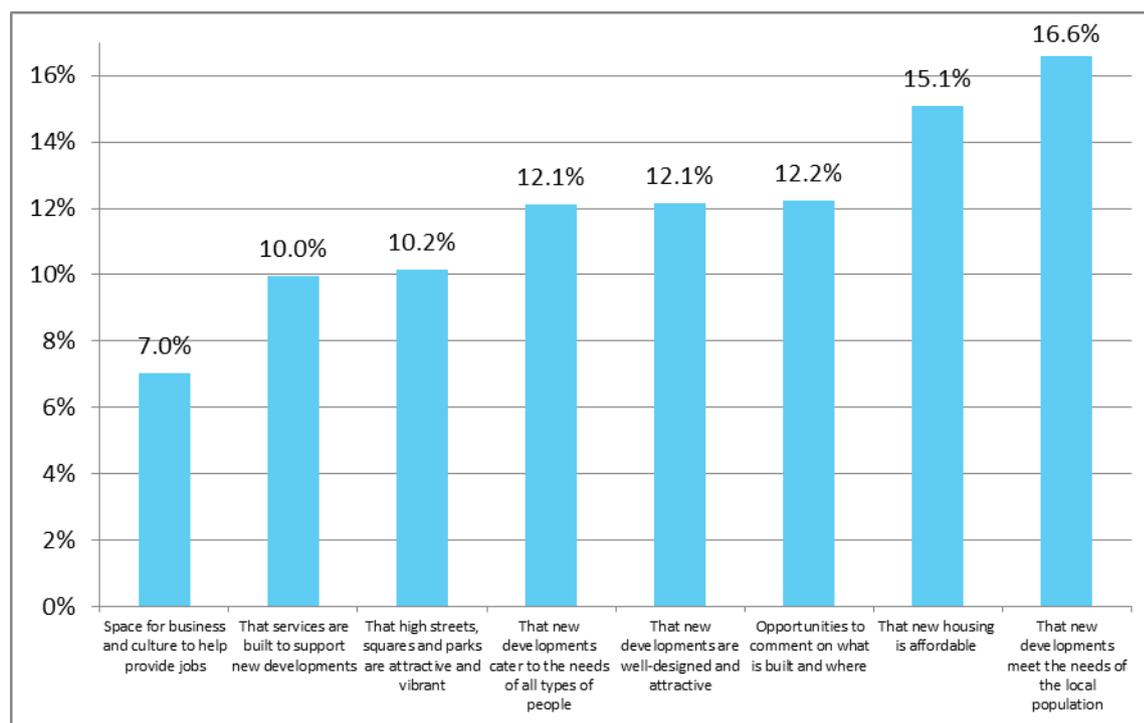
Reiterating the divide between aesthetic and functionality of the built environment and the above satisfaction findings, Londoners ranked the affordability of new housing, provision of services in new developments, and developments that meet the needs of the local population as their top three priorities within the built environment. At the other end of the scale, issues pertaining to design and attractiveness of the city are ranked as the least important issues, likely due to the greater public satisfaction with these areas.

However, contrary to these rank scores, regression analysis shows that both aesthetic and functional aspects of the built environment drives overall satisfaction with the built environment (figure 5).

Since built environment issues are a central element of life in a city, this consistency between issues with regard to relationship to overall satisfaction can be expected. This finding is also reflective of other findings, particularly with regard to issues that diverge between direct and indirect impacts to an individual. In these, the public have prioritised issues that are more directly impactful on their day-to-day lives over less tangible elements of urban policy.

Figure 5: Key drivers of satisfaction with the built environment

The percentages represented by this chart relate to the % change in satisfaction with the built environment each individual issue accounts for. For example increasing satisfaction with services that support development by one unit will increase satisfaction with the overall built environment will increase by 0.1 of a unit.



4.1.3 Demography

Gender was the most significant demographic divide within the built environment with men consistently more satisfied than women (35% vs. 29%). This reflects broader research which has outlined the prevalence of 'gendered spaces' in cities and work that suggests the built environment has been historically dominated by men⁸. This may be further impacted by women's fear of crime in cities, which according to this survey and other research⁹, far outstrips men's. This demographic divide with regard to the built environment and public space is also important in relation to health issues as public spaces have a bearing on both physical and mental health.

The other key divide showed parents (27%) and homeowners (27% owned outright, 22% owned with mortgage) were less satisfied that new developments were including appropriate

⁸ Spain, D. (1992) 'Degendering space' in *Gendered Spaces*. University of North Carolina Press

⁹ See Koskela and Pain (2000) 'Revisiting fear and place: women's fear of attack and the built environment' *Geoforum* 31(2) pp. 269-280. See also Valentine (1990) 'Women's Fear and the Design of Public Space' *Built Environment* 16(4) pp.288-303

services and infrastructure. For homeowners, this may be more of a concern as homeownership signals more permanence in a place, and less mobility to move to other parts of the city with better services and infrastructure. This place-permanence is reiterated by this group also assigning slightly more importance to being able to participate in planning decisions, where the decision making process enables greater ownership of place¹⁰.

4.1.4 Recommendations

Public engagement:

- Deliver opportunities for the public to understand the challenges that London faces in relation to planning a built environment for a growing population, and to consider trade-offs in choices – in order to influence strategic planning and resource management in London in an informed, realistic way.

Undertake research to:

- Further explore the needs of the London population with regard to new development and regeneration and the experiences of different groups thus far, to enable a public voice in strategy such as the London Plan and subsequent project delivery.
- Explore the key issues facing London in terms of its international competitiveness and ability to attract talent (such as house prices, infrastructure pressures and cultural provision).
- Explore gender differences in experiences of the built environment further to identify causalities and solutions to unequal outcome

¹⁰ Lunqvist, L. J. (1998) 'Property Owning and Democracy: Do the Twain ever meet?' *Housing Studies* 13(2) pp.217-231

4.2 Culture and Sport: A London with things to see and do

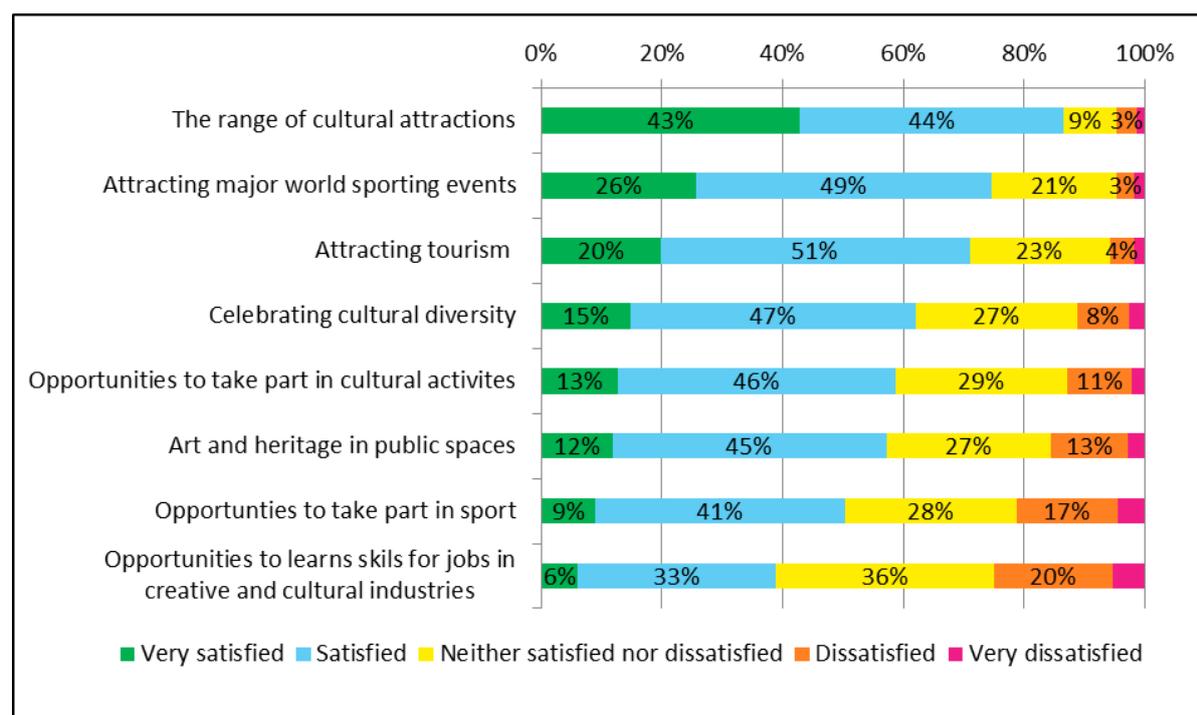
Culture and sport fare best of all policy areas in terms of satisfaction (75% satisfied), whilst, as might logically then be expected, it sits at the bottom of the list of public priorities for improvement. Importantly though, our analysis shows that cultural opportunities are strongly and positively related to satisfaction with London as a place to live, and as such, an important factor to consider in delivering rounded policy that responds to public need as well as priority.

4.2.1 Satisfaction

Satisfaction with culture and sport far surpasses all other policy areas at 75%, compared to other satisfaction rates of around one-third to one-half. Specifically, Londoners are most satisfied with the range of cultural attractions London has to offer, with almost 90% satisfied. London's ability to attract major world sporting events received the second highest satisfaction rate at 75%. Both of these areas are ones which set London apart from other cities. Lower satisfaction rates within culture and sport are those things that can more easily be provided in other cities: opportunities to take part in sport (50% satisfied), and opportunities to learn skills for jobs in creative industries (40%). Notably, all issues received satisfaction levels of more than 39%; unseen in all other policy areas (figure 6).

Figure 6: Satisfaction with culture and sport by policy issue

(NB. 'Don't know' responses have been excluded)



Looking at sport specifically, a divide between consuming and participating in sport can be noted, with satisfaction with the former far outstripping the latter, at 75% and 50% satisfied respectively. This is an important finding considering that physical activity is a key contributor to both physical and mental health.

Satisfaction with culture and sport was reaffirmed in responses to the question of the best thing about life in London, in which reference to the cultural offer was ubiquitous. Specifically, many respondents referred to the variety of free cultural opportunities in London, noting that "there's

always something to do". However, whilst culture and sport were absent from responses to the question on the worst thing about London, many respondents made reference to the cost of living, and the way in which this might impinge on their abilities to consume London's cultural offer: *"often you can't afford to enjoy the best this city has to offer"*. This indicates the value of London's free cultural offer, and the importance of making available opportunities to access culture as the population of London expands.

4.2.2 Priorities

The top public priority is the provision of a wide range of cultural attractions. This issue far surpasses the level of importance assigned to any other issue. The high satisfaction with this is likely the result of the huge number of museums and galleries – many of which offer free access to their collections – and other opportunities in London, which provide a cultural choice above and beyond other cities. On the other hand, London's ability to attract major sporting events is ranked at the bottom of the list of cultural and sporting events to prioritise. This may be due to the high level of satisfaction already felt in this area, but may also be a product of the expense and limited amount of tickets available for these, meaning the majority of Londoners cannot directly consume these events.

Regression analysis revealed four areas which drive overall satisfaction with London's cultural and sporting offer: the range of cultural attractions; participation in sport and physical activities; participation in cultural activities; and hosting world sporting events driving satisfaction to a much greater extent than other areas.

Two of these areas (cultural attractions and major sporting events) are significant in that they differentiate London's offer from that seen in other cities, whilst engaging in cultural and sporting activities will have a direct impact on Londoners' lives, particularly in terms of health and quality of social life.

4.2.3 Demography

The biggest demographic differences with regard to culture and sport fall within educational attainment, reaffirming ideas around the role of cultural and social capital in determining preferences. Those with a higher level of education, that is, those having completed A levels, higher education or a degree, were more satisfied than other groups with the cultural and sporting offer generally (75% vs. 62%). In particular, those with a degree or higher reported greater levels of satisfaction than those with GCSEs or no qualifications for cultural attractions (88% vs. 78%), public art and heritage (59% vs. 51%) and opportunities to take part in cultural activities (61% vs. 52%).

These results may indicate that these groups also make more use of these cultural and sporting opportunities. Those with a lower level of education ranked opportunities to learn skills for jobs in cultural and creative sectors higher than other groups. This demographic split on education raises an interesting point about the way in which different groups use of culture for leisure vs. personal or professional development.

4.2.4 Recommendations

Undertake research to:

- Identify and monitor uptake of London's cultural offer by different groups to understand any changes over time and implications this might have and success of efforts to broaden take up.
- Explore the role culture plays in the lives of different groups of Londoners and the implications that changing patterns of consumption/access might have.
- Assess the extent of substitution of issues such as housing and environmental quality for access to London's amenities such as culture, and the likelihood and positioning of a tipping point to this trade off whereby London's competitiveness is impacted.
- Consider the implications of broader policy such as spatial planning policies relating to affordable workspaces, and cultural visa regulation on the cultural offer in London.

4.3 Housing: Homes for all

Housing is the number one priority for Londoners - 65% of respondents ranked this in their top three issues facing London today. This is likely a result of the widespread discontent we found - 76% of respondents say they are dissatisfied with the housing offer.

Despite this, we have seen that Londoners on the whole remain satisfied with the capital as a place to live (75% are satisfied). This disconnect suggests that for many Londoners, their experience of housing is not currently significantly negatively impacting their lives. Nevertheless the acute discontent is suggestive of a tipping point, and there is clearly cause for concern. The following section shows where Londoners feel this most acutely and what they would prioritise for improvement.

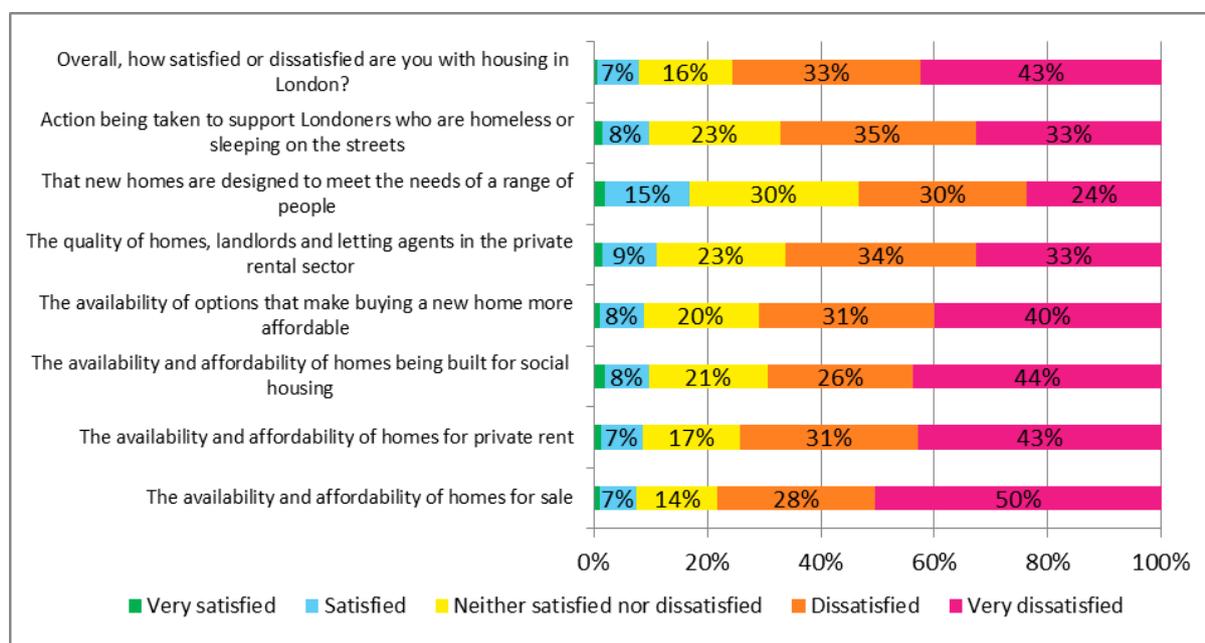
4.3.1 Satisfaction

Findings from the housing section of the survey were overwhelmingly negative. No specific housing issue received more than 16% satisfaction, illuminating the dissatisfaction felt with the housing offer in comparison to other policy areas (figure 7).

Unsurprisingly, affordability has the highest levels of public dissatisfaction, with around three-quarters of Londoners unhappy with the affordability of homes to buy and rent. Consistent with findings from the built environment, where satisfaction with aesthetics surpassed other issues, the design of new homes received higher levels of satisfaction than other housing issues; however this is still only 16%.

Figure 7: Satisfaction with housing by policy issue

(NB. 'Don't know' responses have been excluded)



Dissatisfaction is acute across the range of housing issues, suggesting that it may only be a matter of time before London's lustre is tarnished to such an extent as to become unattractive. Qualitative responses reaffirmed this dissatisfaction with the majority of written responses to the worst thing about London making reference to the cost of accommodation in London, and the lack of affordable housing. Indeed, some Londoners went as far as to say the financial

burden of housing would push them or others out of London: *“Ridiculously high rental costs are squeezing people in the ‘normal’ salary range out of the city.”*

Furthermore, where respondents gave personal information about their housing situation, it was made clear that the housing issue is felt across all sections of society, rather than just those on low incomes: *“I am a young lawyer and I am struggling to find quality housing to purchase ... I earn too much for affordable housing and too little for non-affordable housing”.*

Conflict between long-time residents and new groups in areas of unaffordable housing developments and concern for the increasing disparities felt between the rich and the poor were also commonly referenced. This is reiterated in built environment results, where developments which meet the needs of existing Londoners scored poorly on satisfaction and simultaneously drove overall satisfaction with the built environment¹¹.

These issues of affordability and the sense of being pushed out of the city because of costs were felt more by younger Londoners, a finding which is highly significant for the future of London¹², and has wider implications for mental health as anxieties about cost of living rise.

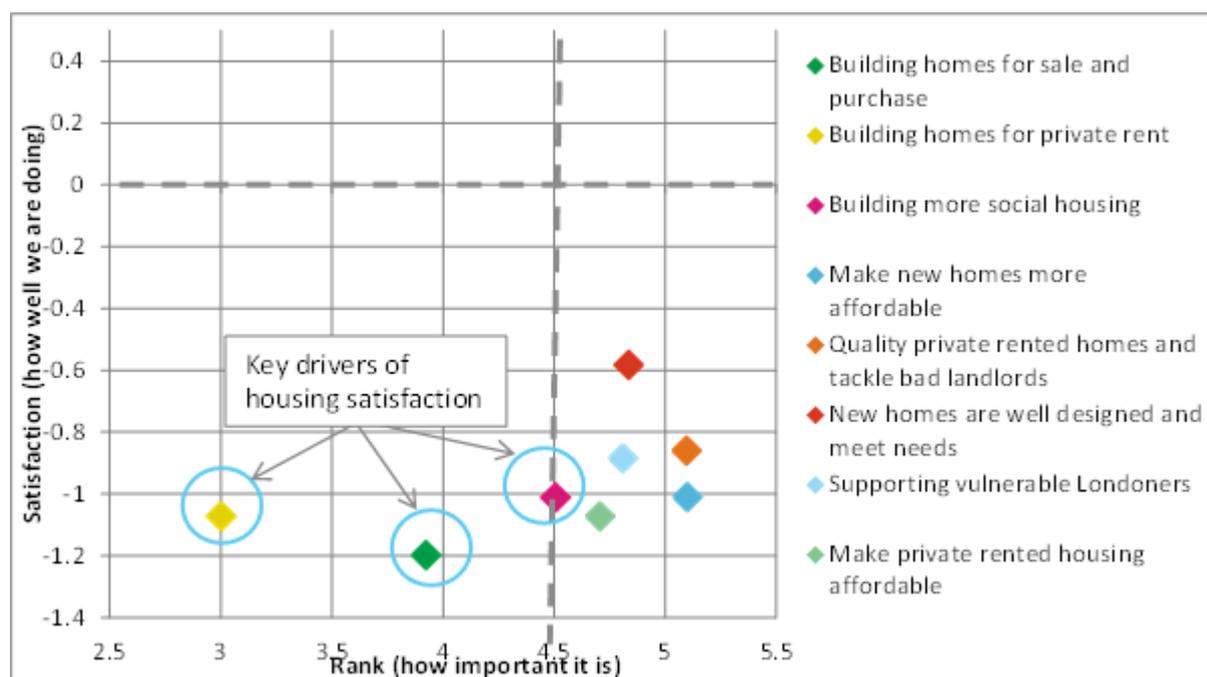
4.3.2 Priorities

Housing is Londoners’ top priority, likely driven by the high levels of dissatisfaction. However, perceptions don’t tell the whole story – housing is not driving satisfaction with London and its neighbourhoods as places to live. With regard to separate issues within housing policy, the importance assigned to different issues is generally consistent throughout – almost everything is seen as equally important, and as outlined above, people are acutely dissatisfied across the board, and largely regardless of their demographic characteristics.

Building homes for rent is the biggest anomaly on the ranking scale, considered to be the least important housing issue. This probably reflects the continued culture of home ownership across British society. At the other end of the ranking scale, and reiterating the culture of ownership, increasing the number of options that make home ownership more affordable is the top ranked issue (though by a small margin). However, results indicate that Londoners are not making the link between affordability of housing and market supply, as the three options that pertain to building homes are ranked the least important.

¹¹ See section 4.1.1 ‘Built Environment Satisfaction’

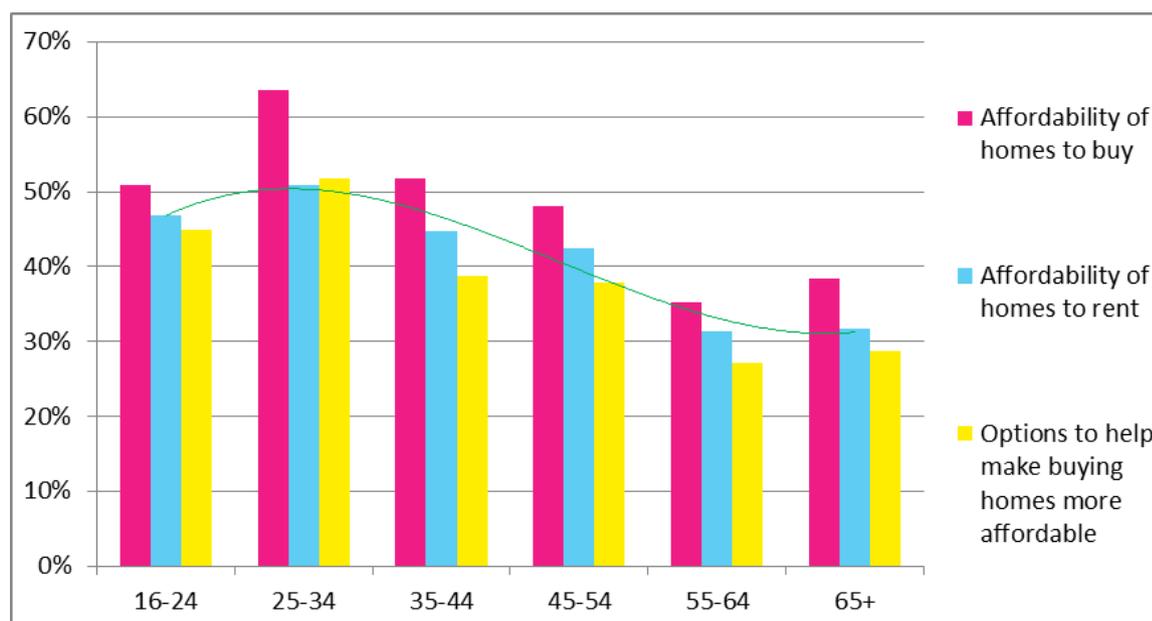
¹² See section 4.3.3 ‘Housing Demography’

Figure 8: Rank vs. satisfaction of housing policy issues

Further analysis reveals that discontent with London's housing offer is driven by issues of affordability, but also availability across the spectrum of tenures. However, affordability remains the most significant housing concern, all the more so given that cost of living was perceived as the second most important issue for Londoners, after only housing. Where cost of living is too high, partly a result of unaffordability, this impedes Londoners' ability to consume London's wider offer and optimise the quality of their social lives, which is shown to be significant in their overall satisfaction with the city.

4.3.3 Demography

Dissatisfaction with affordability related issues – pertaining to both rent and purchase – generally shows a trend of decline as age increases, with a peak in the 25-34 age group (84% dissatisfied with rent affordability, 80% dissatisfied with purchase affordability). This group are those most likely to be first time buyers, finding it difficult to get onto the property ladder. Their dissatisfaction with the affordability of homes to purchase is 63%, twelve percentage points higher than the next age group – 35-44 year olds.

Figure 9: Age and dissatisfaction with affordability of housing

In terms of housing that meets the needs of a range of people, differences by demographic groups are conspicuous by their absence. Those who might be expected to have additional needs, such as older people, families and disabled people all show consistent levels of satisfaction (albeit still largely on the dissatisfied side of things), suggesting that their needs are being met as much as more general needs. This indicates that the divide may be on *local* needs versus needs of a new influx of investors or people new to the city, consistent with the findings in the built environment section.

4.3.4 Recommendations

Undertake research to:

- Better understand the role of the housing market in London's offer in terms of lifestyles, desirability and competitiveness.
- Explore perceptions towards a range of tenures and the implications this has for policy, including existing help-to-buy schemes.
- Enable the public to consider trade-offs in their preferences for housing delivery, and in turn to influence policy in an informed, realistic way.

4.4 Transport: Keeping London moving

Satisfaction rates with transport are second only to culture and sport in terms of positivity, with 41% satisfied, though with 32% dissatisfied feelings are mixed. Londoners do not prioritise improving transport generally over other policy areas, with the issue ranked sixth out of 12 and only 3% prioritising it as the number one issue compared to 35% for housing, the top issue. As with culture and the built environment, the low priority assigned by the public to transport is not reflected in the strength of relationship that it has with overall satisfaction with London, and further analysis shows transport to be the third most significant driver.

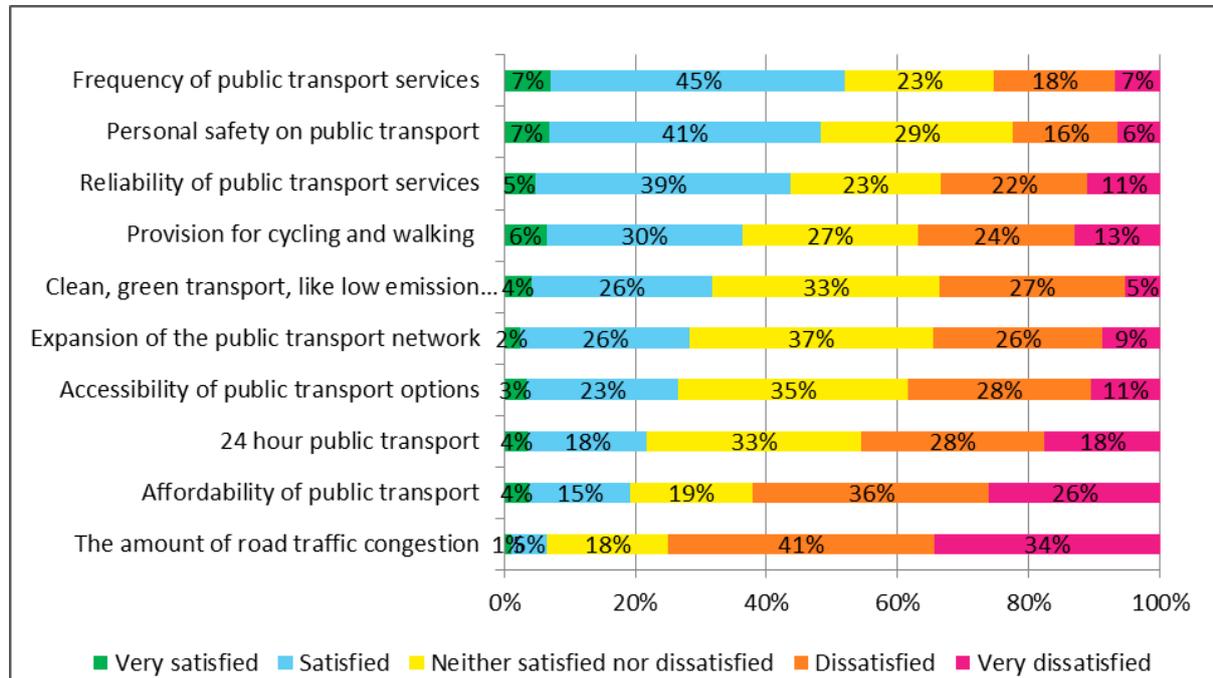
4.4.1 Satisfaction

The results of questions on transport issues were mixed with a fairly even divide between satisfied, neither satisfied nor dissatisfied and dissatisfied, though at each end of the scale, more clear opinions were evident.

Londoners were most satisfied with the frequency of transport services, at 52%, followed by personal safety on public transport at 49% and reliability of public transport at 44%. However, the amount of road traffic congestion had only a 7% satisfaction rate, while 74% of Londoners reported dissatisfaction with this. This resonates with findings on the environment, in which air quality was seen to be Londoners’ environmental priority. Dissatisfaction with the affordability of public transport was similarly consensual at 62% dissatisfied. The provision for walking and cycling has reasonable satisfaction levels (36%). This is encouraging for public health, indicating good provision of the conditions for Londoners to be more active.

Figure 10: Satisfaction with transport by policy issue

(NB. ‘Don’t know’ responses have been excluded)



Verbatim responses to the survey’s qualitative questions reflected the breadth of opinions on London’s transport services. Interestingly, despite the broadly positive outlook, references to transport in answer to the worst thing about London were much more prevalent than those in response to the best thing about London. However, in line with the statistical data, most

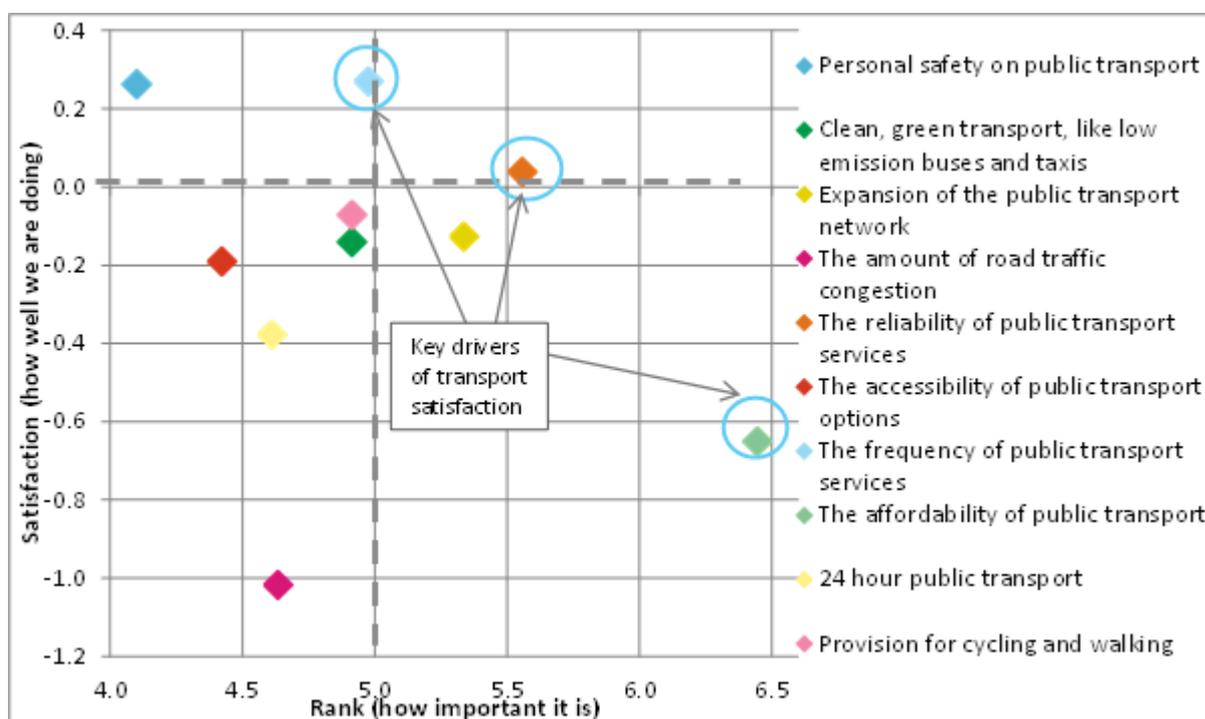
responses which included transport issues referred to road traffic congestion and the cost of public transport. Transport was not often referenced as a big challenge for the future; however other concerns such as stretched services and pollution allude to and are impacted by the transport network. “Over population – especially on transport” and similar comments on population growth were also common: This is significant, as whilst much of the issue specific qualitative data reaffirmed and developed the statistical output, linking issues of transportation to broader concerns such as population growth can offer greater direction for transport intervention.

4.4.2 Priorities

Londoners rank transport services fairly low as a priority in comparison to other policy areas, which may be the result of generally high levels of satisfaction with it. Population growth however is ranked more highly with 10% of Londoners ranking it as their top priority. Qualitative data showed that these concerns about population growth are generally tied to the city’s infrastructural and transportation capacity; an important consideration for the transport policy. Beyond cognitive choices, regression analysis shows that transport has the third most significant impact on overall levels of satisfaction with life in London.

In terms of specific transport issues, Londoners prioritise the affordability of transport, the reliability of transport and an expanded network to serve more parts of London. This chimes with the key driver analysis, which showed reliability to be the most significant factor in determining overall satisfaction by a considerable margin. This was followed by frequency and affordability. Since satisfaction with reliability and frequency is fairly good, there is most scope for improvement with affordability, though this may be through improving transparency in terms of the where revenue is used, rather than simply lowering fares.

Figure 11: Rank vs. satisfaction of transport policy issues



In contrast to the environment findings, where air quality was a key driver for satisfaction with London, the amount of road traffic congestion has the least significant impact on overall satisfaction with London's transport. Whilst congestion and air quality are different policy issues, they are far from mutually exclusive. However, this congestion finding may be indicative of a sample who do not use roads in their daily travel – a greater number of inner Londoners, or those whose main method of transport is the London Underground.

4.4.3 Demography

The most significant demographic divides are between inner and outer Londoners. As could be expected, outer Londoners are more dissatisfied with transport service issues than those in inner London (38% vs. 29%), and this is correspondingly shown with higher dissatisfaction with transport in general. Given the demographic make-up of outer London, this suggests social equity issues resulting from individual wealth and, with continuing in-migration patterns, also ethnicity.

Demographic analysis also revealed that young Londoners aged 18-24 were more likely to prioritise 24 hour transport, and also more likely to be dissatisfied with the current offer (52%), likely reflecting their current greater need for easier navigation throughout the night-time. Women are more likely to be dissatisfied with safety on public transport than men (27% vs.18%), a finding which is reflected in the policing and safety section of the London Survey.

4.4.4 Recommendations

Undertake research to:

- Explore preferences in the trade-offs between different aspects of transport provision. For example, choices such as improving walking and cycling provision despite the short-term impacts on road congestion this might have.
- Better understand opinions on affordability, considering how much more or less Londoners are willing to pay for different standards of different types of transportation.

4.5 Environment: Creating a clean, green, healthy London

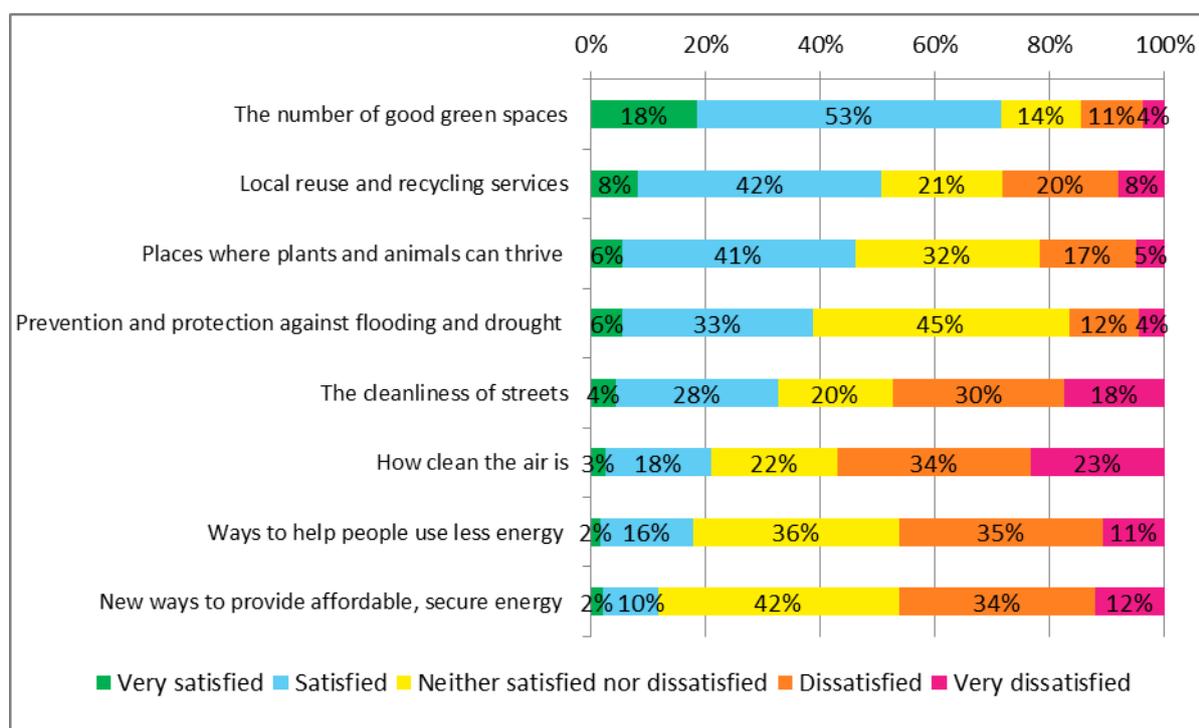
Public opinion is split with regards to London's environment, with a general balance between satisfaction (31%) and dissatisfaction (33%), whilst a further 36% are ambivalent. Londoners currently don't tend to prioritise the environment as a policy area over others, with 4% of respondents ranking it as the top priority for London's future. However, these fragmented and comparatively negative opinions are not reflected in overall satisfaction with London or its localities, with around three-quarters satisfied with both. While the top level picture is murky, feelings around more specific issues are clearer and the following section draws those out and finds some contrasting areas of success and challenge.

4.5.1 Satisfaction

The results of questions on the environment were mixed, with half of the issues receiving reasonably positive responses, and half receiving negative responses. This divide generally fits into two distinct groups, the negative responses pertaining to uses that Londoners experience daily, such as street cleanliness, air pollution and energy use and affordability, whilst the positive are not so closely related to daily activity, such as resilience against flooding and drought, biodiversity and recycling services. The number of good parks and green spaces received the highest satisfaction rate (71%), reaffirming this divide with the vast number of parks a further element of London's unique offer. This is also encouraging for public health, enabling Londoners to spend time outside, contributing to better mental and physical health.

Figure 12: Satisfaction by environmental policy issue

(NB. 'Don't know' responses have been excluded)



Air quality was thought of especially negatively, with 57% dissatisfied. Despite recent improvements in air quality through policy intervention, air quality is still a significant environmental and public health problem. Concerns over air quality were reiterated in responses to open ended questions, where air quality was reference repeatedly, with some respondents

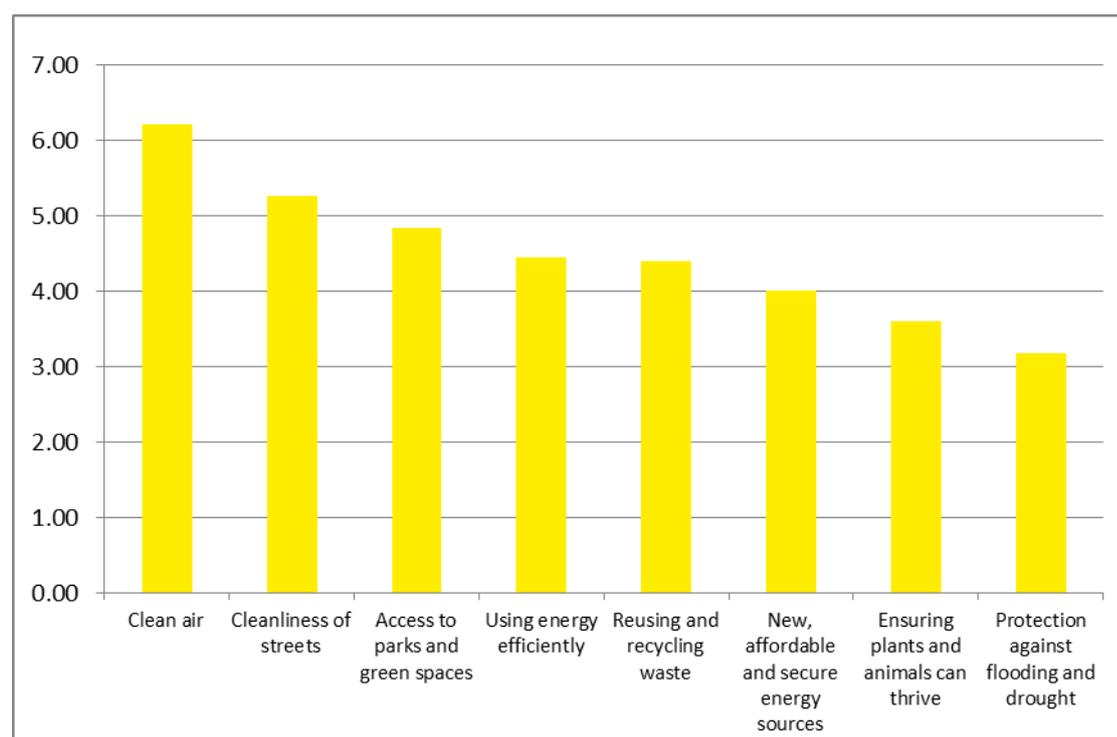
suggesting that the air pollution mean they “wouldn’t want to have kids here”. Many responses also referenced the “general dirty state of streets” and the “litter, filth and graffiti everywhere”.

Responses to qualitative questions also made links between the environment and health, with health concerns as a result of pollution and poor levels of cleanliness cited regularly. Reaffirming this were mentions of “relaxation” and “calm” which relate to mental health, and explain why parks and green space are some of the city’s greatest features. Since health is prioritised over the environment in Londoner’s ranking of policy areas, recognising this function of a good natural environment in the city will have an important impact on everyday life.

4.5.2 Priorities

Reflective of the high dissatisfaction levels, Londoner’s rank air quality as their top environmental issue, followed by the cleanliness of streets and, despite the high satisfaction, access to parks and green spaces. The latter is the only environmental issue seen as important and successful by Londoners, and this is something that should be could provide a platform from which air quality improvements and perceptions of air quality can be improved. The lowest ranked environmental issue was resilience against flooding and droughts. The limited prioritising of strategic issues such as these needs to be addressed to create a public mandate for interventions which address these issues.

Figure 13: Public priorities for the environment:
(Mean average rank scores)



In line with the rank scores, regression analysis has shown air quality to have the most significant bearing on Londoners’ overall perceptions of the environment, and with a significantly stronger relationship than all other areas. Since this also has relatively low rates of satisfaction improvements here are vital to improving overall environmental satisfaction. Also consistent with public priorities, the second key driver is the cleanliness of streets, though this has roughly half the impact of air quality.

In terms of overall priorities, although only 4% of Londoners rank the environment as the most pressing issue facing London, 10% say this of population growth. This is an important factor for the environment team to consider, as an increasing population will have knock on effects to the environment's detriment, particularly key issues such as air quality.

4.5.3 Demography

Londoners' geography had the most significant impact on demographic differences, though these were generally fairly minimal. Inner Londoners were significantly more likely to be dissatisfied with the city's air quality than outer Londoners (63% vs 51%). This can be expected considering their closer proximity to high levels of road congestion and therefore lower air quality. This demographic intelligence provides an important insight for the public health team, and indicates areas on which to focus strategy for issues such as respiratory health and physical health through outdoor activity. Inner Londoners were also less satisfied with London's environment overall (36% vs 32%), and since air quality is the most significant driver of overall satisfaction with the environment, this could be expected.

4.5.4 Recommendations

Undertake research to:

- Identify the issues the Mayor needs to communicate around in order to get public buy-in to and deliver strategic priorities such as community energy networks despite low perceived need by public.
- Consider how the lessons from current work to help encourage school children to walk or cycle low pollution routes might work more broadly for other at risk groups such as older people.
- Explore the barriers to uptake of energy efficiency measures by those groups most at risk of fuel poverty.

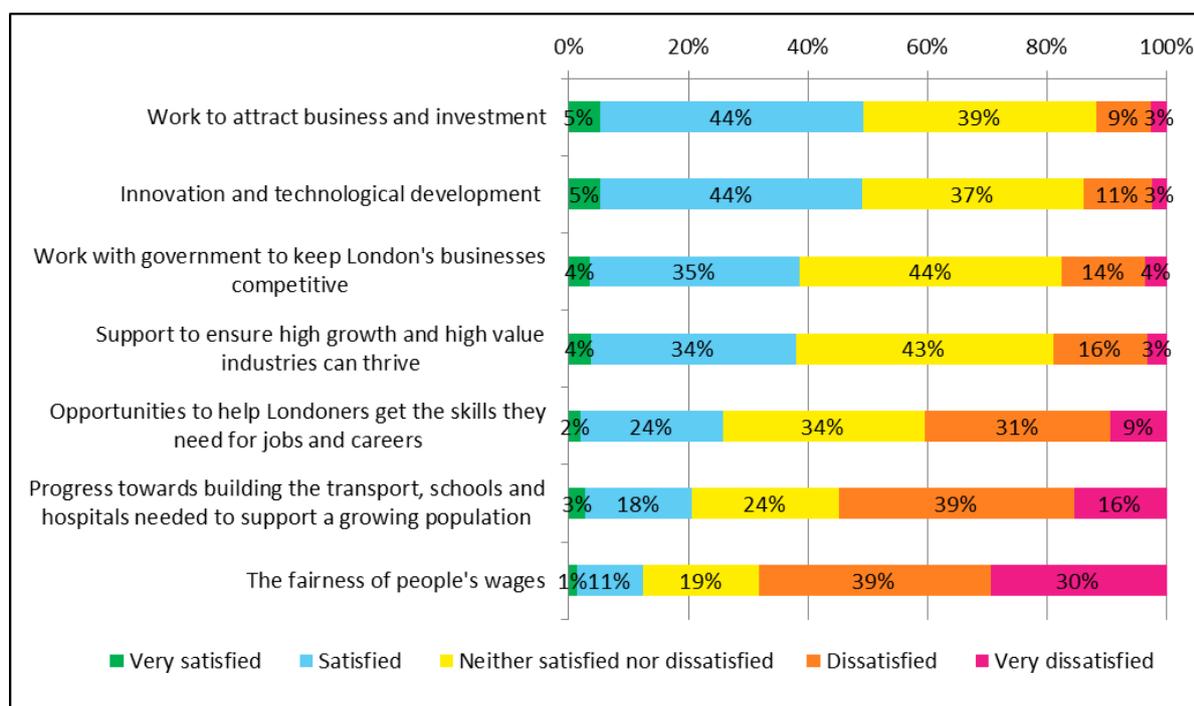
4.6 Economy: Keeping London's economy growing

The economy is ranked towards the bottom of all the 12 priority issues listed, with only culture and regeneration getting fewer votes. This is a wholesale change from several years ago when it repeatedly came top of polled public priorities. This is likely reflective of upward growth and employment rates since the financial crash, indicated again in this survey by a comparatively low proportion dissatisfied with London's economy (25%) – the lowest level of dissatisfaction bar that of culture.

4.6.1 Satisfaction

Satisfaction with the economy appears to show two clear clusters – areas with a high level of satisfaction, and areas with a lower level of satisfaction (figure 14). Within this divide, issues with a higher level of satisfaction are more closely linked with the macro economy, such as attracting business and investment (49% satisfied), innovation and technological development (49% satisfied) and competitiveness (39% satisfied). On the other hand, issues that pertain more to personal economic situation, such as the fairness of wages or opportunities to gain skills for career development receive lower satisfaction levels (12% and 26% satisfied respectively).

Figure 14: Satisfaction with the economy by policy issue:



Despite the relative positive attitude to London's economy as a whole, in responses to open ended questions, the economy was the third most referenced challenge for the future of London, after housing and population growth. Reflecting the divide between opinions on the macro economy versus personal economic issues, where respondents referenced economic issues as the worst thing about London these most commonly included cost-of-living concerns and low wages, whilst reference to the best thing about London, participants focused on broader issues, such as the city's position as a "global centre for business". These divides in

opinions reiterate problems of London's growing divides and social inequality,¹³ as well as illustrating altruistic concern for these issues, regardless of socioeconomic standing.

Significantly the questions asked in the survey did not ask about personal economic situation directly, thus verbatim responses that include these issues present additional insight, and indicate that whilst the macro economy and growth is important, and satisfaction with this high, it is of less concern to Londoners. Rather, repeated reference to factors that contribute to an unstable personal financial situation appear more pressing, with many Londoners concerned about how much longer they will be able to afford to live in the city, noting that *"even the averagely paid among us struggle to stay afloat"*. This indicates a fragile balance for Londoners, and is linked to broader concerns regarding housing and the cost of living, which will begin to impede on cultural consumption and quality of life.

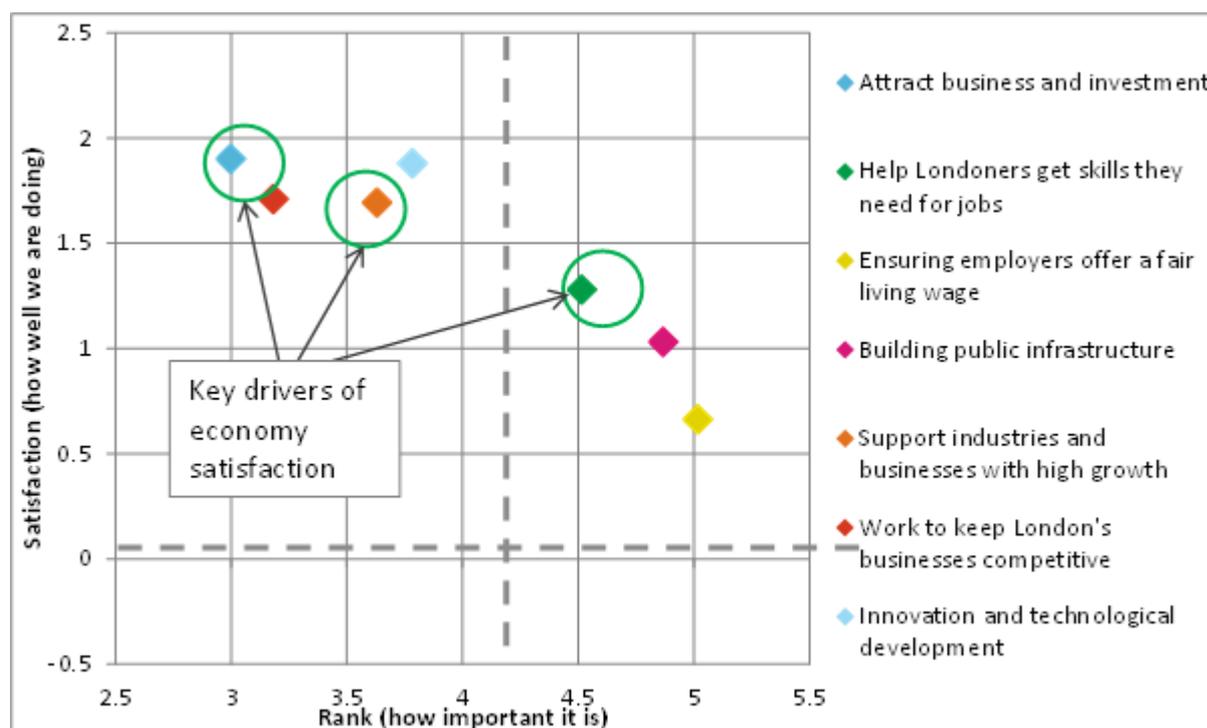
4.6.2 Priorities

When asked to rank priorities for the economy, Londoners answers again followed the pattern outlined above, showing a divide between the macro economic situation and personal economic situation, with participants prioritising a fair living wage, the provision of infrastructure to support the growing population, and the provision of skills for jobs and careers over other areas. Emphasis on these areas may be the result of the lower levels of satisfaction with them, or their greater exposure to them day-to-day as more directly impactful issues. At the other end of the scale, attracting business and investment and the city's competitiveness are seen as the least pressing issues for Londoners.

Contrary to these rankings, regression analysis has shown the issues which have the strongest impact on overall satisfaction with the economy include both micro and macro issues. Specifically, attracting business and investment, opportunities to gain skills for jobs and careers, and support for high value industries such as tourism, finance, technology and medicine. This provides further interesting insight as they each focus on economic *opportunity* in the future rather than either macro growth or personal situation. Whilst the aforementioned trend is not apparent here, this still asserts the importance of issues that impact an individual's quality of life, rather than overall quality of life for Londoners as a whole.

¹³ New Policy Institute (2015) 'London's Poverty Profile 2015' *Trust for London* [online]: <http://www.londonpovertyprofile.org.uk/LPP%202015%20findings.pdf>

Figure 15: Rank vs. satisfaction of economic policy issues



4.6.3 Demography

The most significant demographic divides with regard to the economy were visible by tenure and age. This is most likely the result of being in a more precarious economic situation when younger or in the private rented or socially rented sectors.

Young people and renters both felt London's cost of living was a more pressing challenge than other demographic groups (49% of 16-24 year olds, and 51% of social renters compared to 41% of the whole population), which also matched results regarding transport affordability (34% of 16-24s, 33% of social renters).

Despite this, younger people aged 16-24 also tended to be more satisfied with London's economy and business overall (47%). This may reflect the number of graduates who come to London for work in the new service economy. This is particularly interesting as this group are simultaneously dissatisfied with the housing offer, raising question about young Londoners' priorities and perceptions of what most strongly impact their quality of life.

4.6.4 Recommendations

Undertake research to:

- Explore the attitudes towards London wages, income disparity and high cost of living alongside the desire to remain in the capital to provide insight into the extent that these issues impact on Londoners' decisions to stay in the city, and influence on new talent to move to the city.
- Explore Londoners attitudes towards opportunities to gain skills and access jobs in high value sectors of strategic importance to London, both in terms of quality and access and demand/understanding of importance in terms of rising costs of living in London.

4.7 Policing and Crime: Helping Londoners stay free from harm

Only 27% of Londoners are dissatisfied with their safety in the city. Londoners on average rank safety as the fourth most important issue facing London today, and statistical analysis shows that it is the most strongly related issue to local area satisfaction underlining its important in neighbourhood life. Contrastingly, satisfaction with crime and safety shows a weaker relationship to satisfaction with London as a whole, suggesting people's needs differ at that scale and their experiences are shaped by wider factors.

4.7.1 Satisfaction

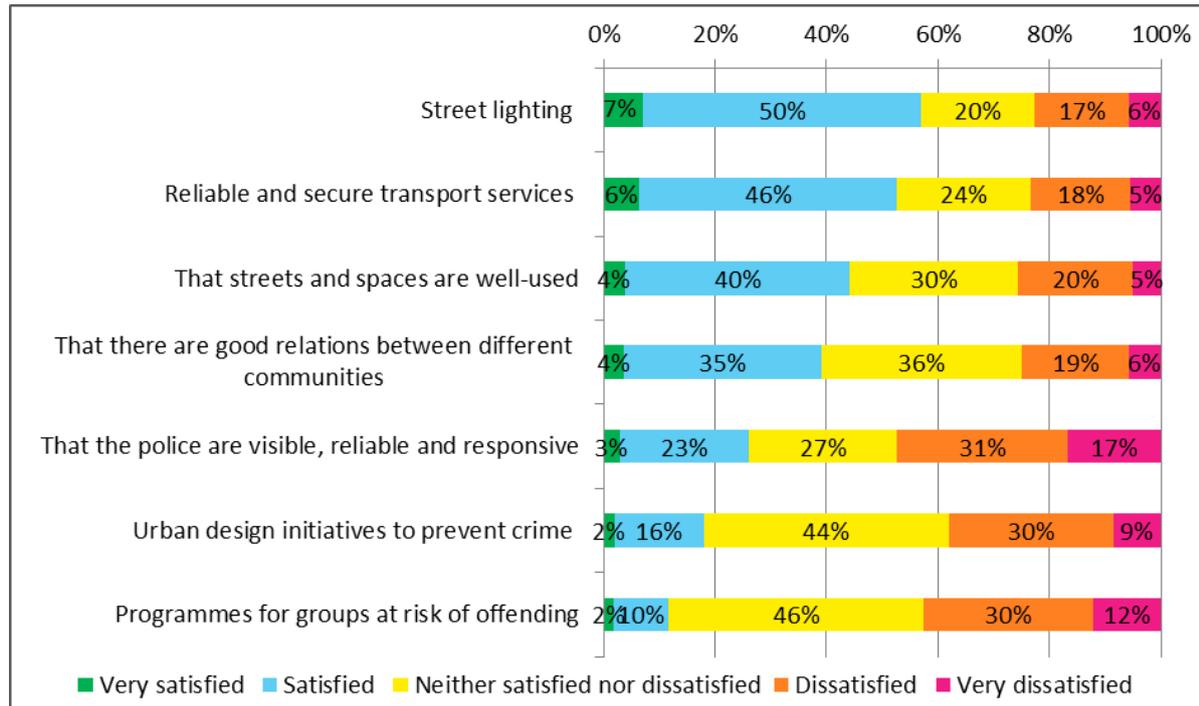
Results on specific safety issues are generally positive, though it should be noted that the largest proportion of 'don't know' responses were seen in this section. This may be due to questions which focused largely on interventions that have an indirect impact on increasing safety and reducing crime, such as urban design and work with groups at risk of offending, many of which respondents may not necessarily attribute to safety or crime reduction. This was reiterated by high numbers of participants also selecting neither satisfied nor dissatisfied in these areas.

Specific results within policing and safety varied (figure 16), though more people were satisfied than dissatisfied with street lighting, the security of transport services, the extent to which streets and spaces were used, and community relations. The visibility, reliability and responsiveness of police had the highest rates of dissatisfaction (49% dissatisfied).

Similarly to quantitative responses, qualitative responses which referenced issues of crime and safety varied. Though there were more mentions of crime and safety issues in response to the worst thing about London, than there were to the best thing about London, this number was still relatively low. Qualitative responses gave greater insight into variations of satisfaction, with participants outlining when and where they are more or less satisfied, with regular reference made to increased concerns for personal safety at night (*"I'm scared to walk at night. There are too few police"*). Other qualitative responses appeared to be the product of media discourses, referencing *"terrorist attacks"* and *"people attacking people with knives"* rather than an actual lived experience. Understanding what drives differences between perceptions and experiences of crime is an important avenue for further research.

Figure 16: Satisfaction by crime and safety issue

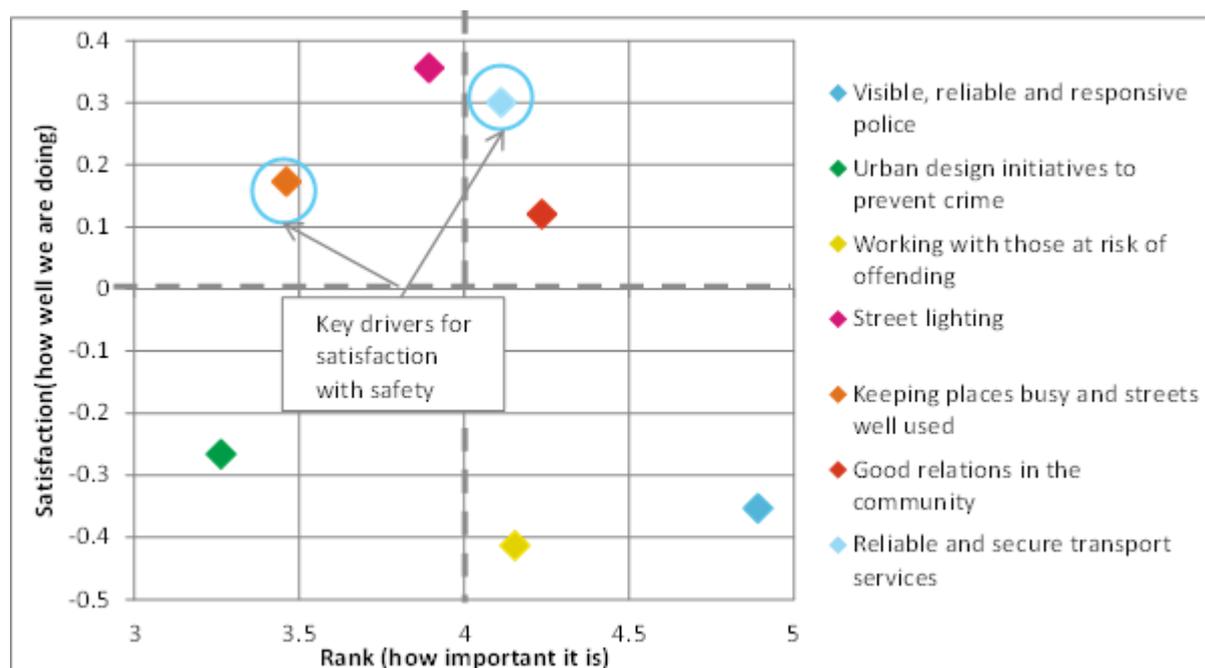
(NB. 'Don't know' responses have been excluded)

**4.7.2 Priorities**

Londoners ranked police presence, good relations between people in their communities and preventing crime through working with people at risk of offending as the most important factors in helping them feel safer. When we compare public priority with satisfaction (figure 17) we can see that policing has the greatest scope for improvement, and must remain a political priority. Urban design initiatives to improve safety was ranked as the least important factor for safety, though, as outlined above, this low ranking may have been the result of a lack of knowledge or awareness of this issue.

Whilst Londoners rank policing, communities and working with at risk groups highly; regression analysis shows that in actuality, secure transport and well-used streets are the key drivers of satisfaction with safety. These latter issues reflect more closely actual experiences of safety, as opposed to perceptions of safety which are altered by the former – particularly police presence, for example. Since the experience of using transport and exercising mobility through different streets and spaces in the city is a daily occurrence, these drivers should be expected due to their pervasive impact on Londoners' day-to-day activities.

Figure 17: Rank vs. satisfaction of safety policy issues



4.7.3 Demography

Safety was most significantly an issue for women and BAME Londoners, both of which reported feeling less satisfied with safety overall. This is most likely linked to feelings of vulnerability in these groups, particularly women's increased fear of crime in cities¹⁴, the higher levels of crime BAME groups in particular suffer¹⁵, and their increased likelihood of being stopped by police¹⁶.

The charts below illustrate the consistently higher levels of dissatisfaction felt by women and BAME Londoners across a range of safety issues. On gender lines, these findings are consistent with those in the built environment, where women are less satisfied with public spaces, and in transport, where women are more likely to be dissatisfied with their personal safety on transport, again alluding to day-to-day experiences of safety rather than perceptions of crime.

¹⁴ See Pain, R. (1997) 'Gender, Race, Age and Fear in the City' *Urban Studies* 38(5-6) pp. 819-913. See also section 4.1.3 Built Environment Demography

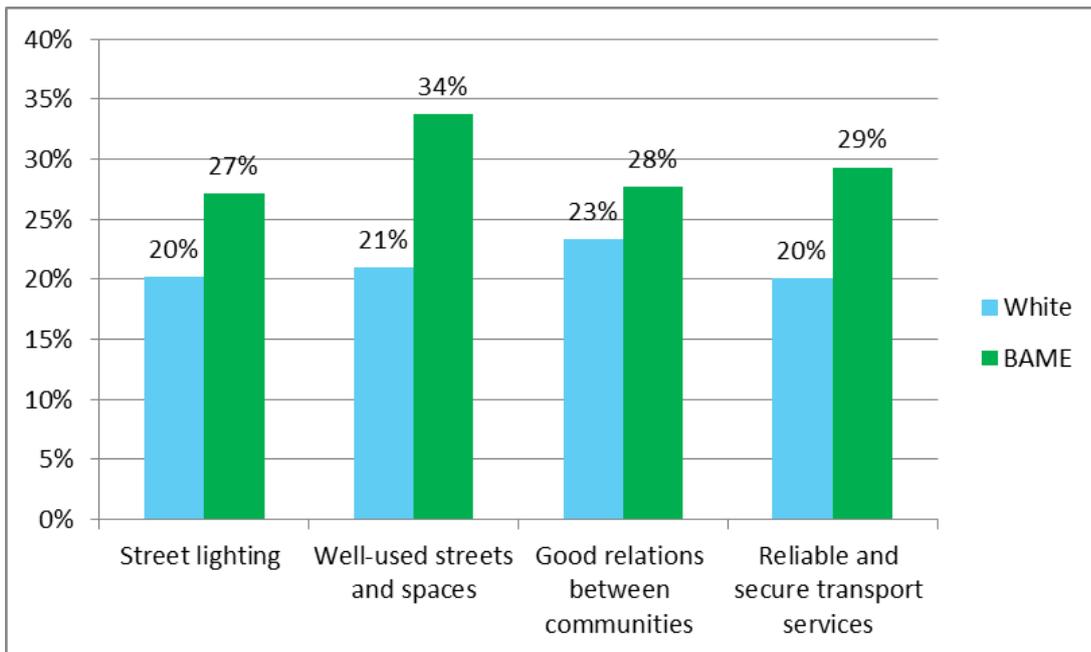
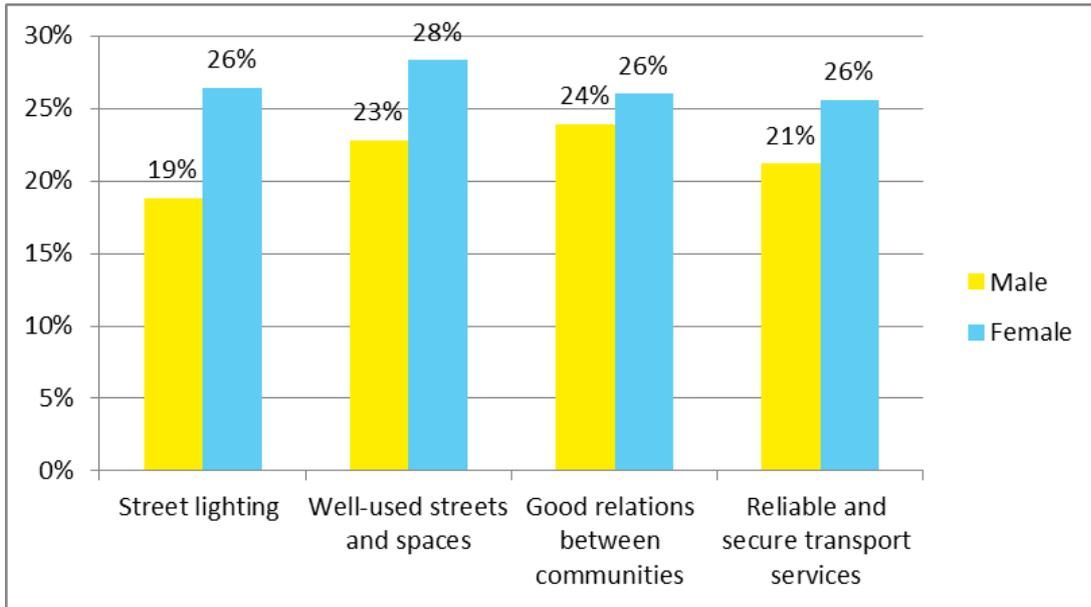
¹⁵ Ministry of Justice (2013) 'Statistics on Race and the Criminal Justice System 2012 – A ministry of justice publication under Section 95 of the Criminal Justice Act 1991' [online]:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/269399/Race-and-cjs-2012.pdf

¹⁶ Ministry of Justice (2013) 'Statistics on Race and the Criminal Justice System 2012 – A ministry of justice publication under Section 95 of the Criminal Justice Act 1991' [online]:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/269399/Race-and-cjs-2012.pdf

Figures 18 and 19: Net dissatisfaction with safety



4.7.4 Recommendations

Work with The Mayor’s Office for Policing and Crime to ensure they consider the findings of this research in their policy and future plans for research around safety and crime issues.

5 Overall Findings: Joining the dots

The following brings together the information presented above. It offers an explanation of the differences between policy areas and highlights the delicate balance between satisfaction of different policy areas and their impact on satisfaction with London. It then offers potential avenues for improvement to help ensure London's continued success.

5.1 Perceptions of the everyday and the extraordinary

Housing, the environment and the built environment's functionality are central to life in cities, and make up the realities of everyday life in a metropolis. From the results we can see that in London, these have become increasingly contentious issues as the cost of living rises, air quality impacts on health, and new developments rapidly alter the identity of the city.

The London survey has revealed that housing is by far the most negative policy area for Londoners, with 76% dissatisfied with the housing offer and only 8% satisfied. This sends a clear message to policy makers, quantifying a discontent that has been widely discussed in politics and the media. The affordability of housing for rent and purchase has the lowest levels of satisfaction. These two issues also have the closest statistical relationship to overall satisfaction with housing, thus driving the dissatisfaction seen in this policy area. This should be of little surprise where the average cost of a home in London grew from £435,577 to £525,257 between 2012 and 2014, and the median cost grew by 20%¹⁷. The current housing situation produces winners and losers, but even so the London Survey results have shown that the majority of people are concerned.

The environment, though more positive in its results than housing by a significant margin, also shows low levels of satisfaction, and higher levels of dissatisfaction. Air quality has the highest dissatisfaction rate of all environment issues, at 57% and was also the most frequently cited environmental issue in written responses to qualitative questions. Moreover, Londoners rank air quality as the most important environmental issues impacting their quality of life. A reasonably recent issue on the public agenda, undoubtedly driven by media discourse, this indicates the pressing need for policy makers to continue air quality initiatives, as well as better communicate ongoing challenges and recent improvements that have been made with regard to air quality and pollution levels across the city.

The built environment – particularly land-use planning, urban development and functionality – is thought of similarly to the natural environment with around a 40% dissatisfaction rate. Supporting the overall trends that distinguish between the extraordinary elements of policy and the foundations of city making¹⁸, the built environment's basic elements, such as the affordability of new housing, and developments that meet the needs of Londoners received the lowest satisfaction scores. Design and public spaces (likely strongly related to heritage in particular given the emphasis on this in qualitative responses), on the other hand – two issues which perhaps pertain more closely to culture, and offer something unique and special – fared much better in terms of satisfaction. However, in terms of driving overall satisfaction, the built environment issues show similar levels of impact on satisfaction, suggesting relative equal importance across all issues.

¹⁷ Department for Communities and Local Government, Land Registry (2015) 'Average House Prices' [Online]: <https://www.gov.uk/government/organisations/department-for-communities-and-local-government/series/housing-market>

¹⁸ See 5.2 'Beyond perceptions: Driving Londoners' satisfaction

Interestingly, despite the lack lustre performance of housing, environment and built environment factors, for many Londoners, overall satisfaction with life in the capital is considerably higher, at 75%. This is indicative of a disjuncture between policy satisfaction level, and the importance of these specific areas for overall quality of life in London: it appears that Londoners will compromise on poor outcomes in certain areas if other parts of London life can offer them an urban experience unlike any other.

London's uniqueness comes from its amenities and successes, which set it apart from other UK and global cities. In contrast to the above discussion, where low satisfaction dominates areas of 'everyday life', the unique services and opportunities in the city are thought of much more positively – more closely in line with overall satisfaction rates for London and its localities. This indicates that currently it's these areas that generally have more of an impact on Londoners' quality of life, and indeed engender a willingness to substitute poor performance in some policy areas for excellence in others. This balance keeps the number of residents growing (up more than 500,000 between 2010 and 2015¹⁹), and the influx of tourists steadily increasing.

The city's culture is expansive, and Londoners recognise this, with 75% satisfied with the cultural opportunities in the capital, most strongly driven by the wide range of cultural attractions on offer, such as museums, galleries and theatre. Indeed, in the year 2014 there were 43 million visits to London's cultural institutions²⁰. This positive reception of culture is also reflected in satisfaction with the architecture, design and attractiveness of the city's public realm, which help to build an immediately identifiable urban identity.

The public transport network is also looked on favourably, with 40% of respondents satisfied with it, noting particular satisfaction with the reliability of different transport services and the increasing provision for walking and cycling, both of which contribute to the city's liveability. In the year 2013/14, 4 billion passenger journeys were made on London's public transport network, emphasising its impressive capacity²², and placing it streets ahead of other municipalities' transport infrastructure.

Only one-quarter of respondents feel dissatisfied with the economy, with particularly high satisfaction levels reported for aspects of the macro economy, such as investment, innovation and technological development, and London's competitiveness, each of which are known to be more successful than in other UK and European cities. Where London alone contributes more than 20% to the UK's GDP,²³ the economic difficulties felt in other cities have been less marked in the capital. This has kept jobs and wages growing²⁴, providing economic opportunities on an unrivalled scale.

Thus, whilst housing, the environment and planning contribute to the foundations of all cities, the above areas of urban policy – culture, transport and the macro economy – set London apart

¹⁹ Greater London Authority (2015) Round Demographic Projections – Local authority population projections

²⁰ Greater London Authority (2014) 'Take a Closer Look: a cultural tourism vision for London 2015-2017'

²¹ Morris, J. (2015) 'Association of Leading Visitor Attractions: London dominates list of best UK visitor attractions led by the National Gallery' CITYAM [online]: <http://www.cityam.com/211649/london-leads-list-top-uk-visitor-attractions>

²² Greater London Authority, Transport for London (2015) 'Number of journeys by TfL reporting period, by type of transport' [online]: <http://data.london.gov.uk/dataset/public-transport-journeys-type-transport/resource/a7a69c22-150c-49f3-a1fd-90d4c24d98d4#>

²³ Office of National Statistics (2015) 'Regional Gross Value Added (Income Approach)' [online]: <http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Regional+GVA#tab-data-tables>

²⁴ Centre for Cities (2016) 'Cities Outlook 2016' Centre for Cities, London

from other metropolises, and create a unique offer for liveability and quality of life which cannot be matched elsewhere. The way in which different policy areas pertain to overall satisfaction with London life, explaining substitution of outcomes in policy areas which are perceived to be underperforming is outlined below.

5.2 Beyond perceptions: Driving Londoners' satisfaction

Key driver analysis shows that the policy areas with the highest level of bearing on London satisfaction are culture, transport services and issues of the built environment, with qualitative data indicating greater impact of heritage and architecture. Since satisfaction with these issues are also higher, this helps to explain why people are willing to compromise on issues such as housing and environmental quality, or moreover, substitute these areas for opportunities in others, such as culture. This resonates with Glaeser et al.'s 'consumer city' hypothesis²⁵: Londoners are preferential to elements of the city that make it stand out above other urban areas – a cultural offer second to none, a unique identity created through heritage and architecture, and a world-class public transport system – in essence, the unique and extraordinary.

This reiteration of the 'consumer city' hypothesis, shows London to be an archetypal example of a city made increasingly successful in the face of new and changing tastes and preferences, and a consumption led economy. However, whilst Glaeser et al. noted that people settle for the cost of living growing faster than wages in amenity cities, specifically, the London Survey has revealed that Londoners will generally compromise on, or moreover, substitute the city's housing offer and environmental quality if a city has:

- An attractive and well-designed public realm;
- A range of opportunities to experience culture and sport;
- Fast connection through good transport networks.

These three aspects of life in London are central to the city's identity and allure. Quality of life, by way of urban amenities has become increasingly critical in determining the attractiveness of places. This is realised more acutely as the trend of Londoners' improved personal financial situation continues to increase²⁶. Thus, fundamental in sustaining the current levels of satisfaction with the city, and attracting new talent in, is the provision of attractive places, with services, opportunities and experiences that differentiate London from other cities and promote civic pride.

5.3 Areas of focus: Ensuring continued success

As noted in specific policy areas, where satisfaction is high, public priority is low. Overall we see this trend most clearly with culture and sport and transport, both of which have relatively high satisfaction levels, but come near the bottom of Londoners' ranking of priorities. Rather housing, the cost of living and population growth are considered Londoners' three priority issues, with the most pressing policy areas of housing, the economy and the environment.

In terms of policy intervention, there needs to be a nuanced consideration of the interdependence of these separate policy areas. For example, whilst culture, as a key driver of satisfaction with life in London, must be maintained, this cannot be done in a vacuum. To

²⁵ Glaeser et al. (2000)

²⁶ Centre for Cities (2016) 'Cities Outlook 2016' Centre for Cities, London

ensure Londoners continue to have the ability to consume and therefore enjoy culture, housing availability and affordability must be addressed to prevent overall satisfaction with London from decreasing. Similarly, if air quality becomes stifling, people will not be able to enjoy London's heritage, streets, and spaces, which create the identity that makes people proud of their city.

This research suggests that of all the areas for possible intervention, action on the following policy issues will have the strongest impact on improving satisfaction with London. These were identified by looking at issues that most forcefully drive overall satisfaction with London, those considered to be underperforming with scope to improve, and those that are publicly perceived as important.

- Improving housing and urban development, in particular looking at affordability and ensuring that new developments meet the needs of existing Londoners;
- Focusing efforts in culture and sport on maintaining the world class attractions, such as museums and galleries, and improving opportunities for participation in local sporting activities;
- Improving the frequency and reliability of transport services;
- Improving air quality and cleaning streets to create a more liveable environment; and
- Helping Londoners get the skills they need to be successful in the changing economy.

Focus in these areas is important for moving London forward, but a balance between a satisfactory 'ordinary' but highly successful 'extraordinary' offer must be maintained. Disruptions to this balance can and will occur should the former supersede the latter, or the current situation worsen. Managing this risk by balancing trade-offs within and across policy issues and areas is central to all intervention moving forward.

6 Conclusions

The results from the London survey show large-scale discontent with issues such as housing affordability and air quality. Yet this is present in a seemingly contradictory context – findings also show that Londoners are generally happy with life in the city, and London's allure evidently remains, as its population continues to grow apace.

As such, it seems that Londoners are willing to compromise on some aspects of their lives, trading them off in favour of access to other opportunities. At the same time it appears that those aspects they are trading-off, such as housing, for the majority at least, are not yet having a significantly adverse impact on their overall quality of life. What is unclear from this work however, is how close some Londoners might be to a tipping point, at which the opportunities gained, through avenues such as culture, are less valuable than trade-offs made. This is the point at which London loses its appeal.

Clear insight into the opportunities and services that people are seeking in London is revealed when considering satisfaction rates with issues like culture and transport – the amenity offer of the city. Satisfaction with these areas is high, and fortunately so, as analysis shows us that they are the issues that drive satisfaction with London at this point in time. This concept of amenities that make cities attractive and pander to new consumption practices is not new; indeed London appears to be an archetypal “consumer city”, as hypothesised by Glaeser et al. 15 years ago. In their hypothesis, it is stipulated that as lifestyles change and financial situations improve, individuals place more importance on these amenity factors.

This is highly significant for policy-makers, highlighting the balance that must be attained to ensure London continues to stand out above the crowd of global cities. The future of London needs to be considered as one which depends on well-rounded development. Housing, while in crisis and quite rightly at the forefront of public and political priority, cannot be the only focus, or to the detriment of flourishing culture and attractive, unique places. Likewise, as we continue to improve and increase London's amenity offer, we must avoid crippling and marginalising rises in the cost of living as people continue to move here seeking out an experience like no other.

A joined up approach to policy making, which simultaneously increases and improves the provision of the everyday whilst also developing the city's unique offer is pivotal in the retention of a successful city. Only this combination will attract the talent to drive a burgeoning city offer and ensure that they, along with the existing creative, mixed and energetic London community, can afford to stay and live the lives they desire.

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