2022 Survey of Londoners

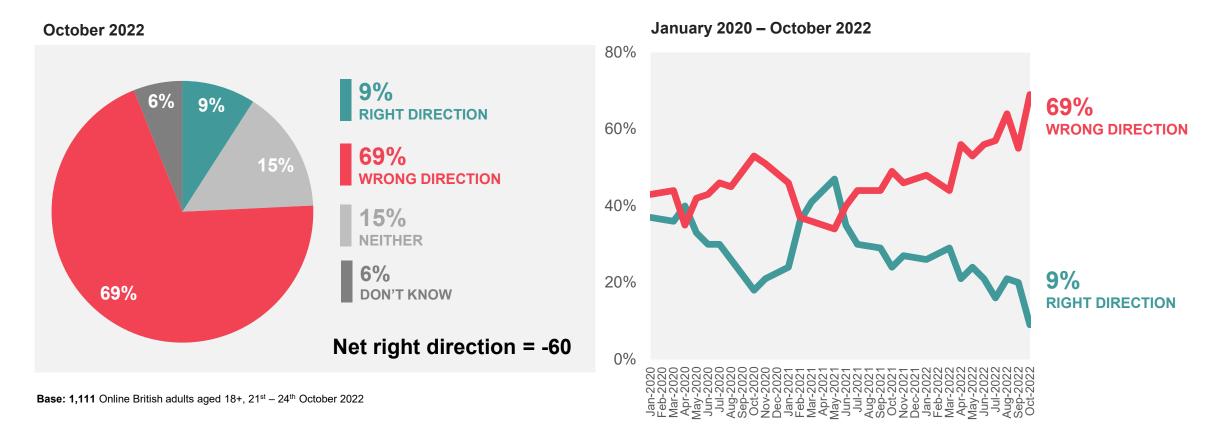
Presentation to Leaders' Committee

13 December 2022



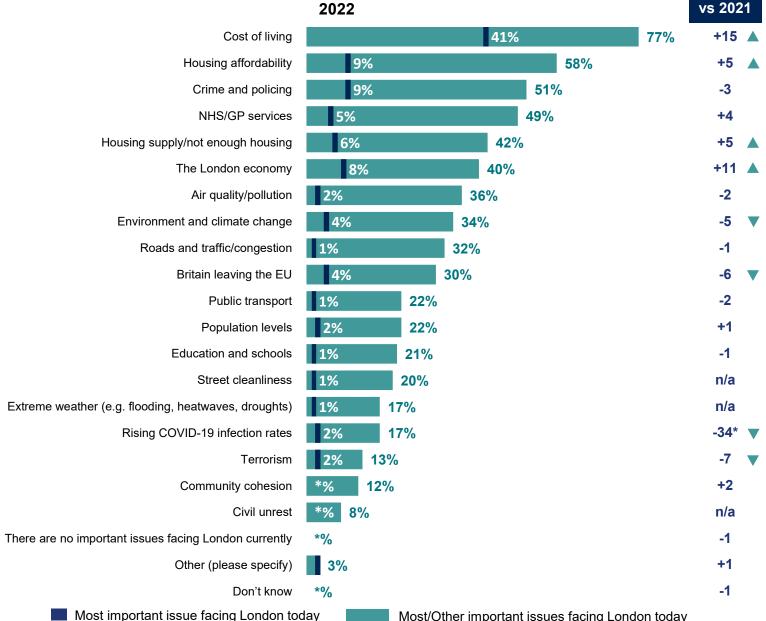
The national context: the public mood is grim, and we are in something of an 'optimism recession'

Q. Generally speaking, do you think things in Great Britain are heading in the right direction or wrong direction?



lpsos

The rising cost of living is the top issue facing London, even more so than last year



Q. What would you say is the most important issue facing London today?/

Q. And what do you see as other important issues facing London today?

Most/Other important issues facing London today

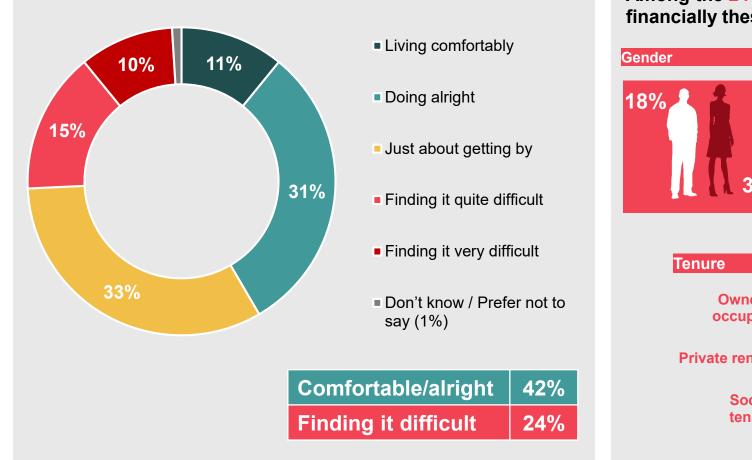
* Code was 'The COVID-19 pandemic' in 2021

Base: All adults aged 18+ in Inner/Outer London (2022: 1021): Fieldwork dates 27th October - 9th November 2022; Source: Ipsos UK

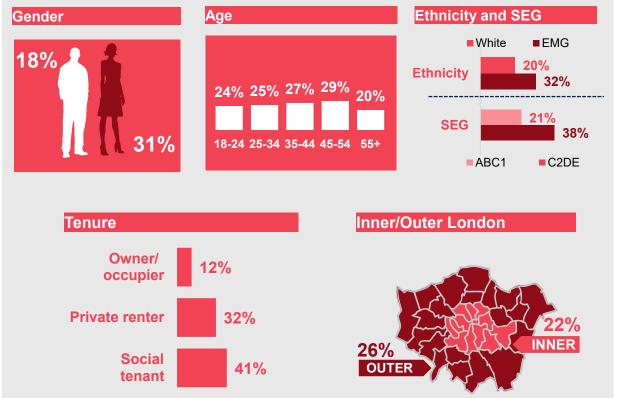
3 © Ipsos | London Councils - Survey of Londoners | December 2022 | Version 1 | Client Use Only



Who is more likely to find it difficult to manage financially these days? Women, renters, those from minority ethnic backgrounds and in lower social grades in particular



Among the 24% who say they are finding it difficult to manage financially these days...



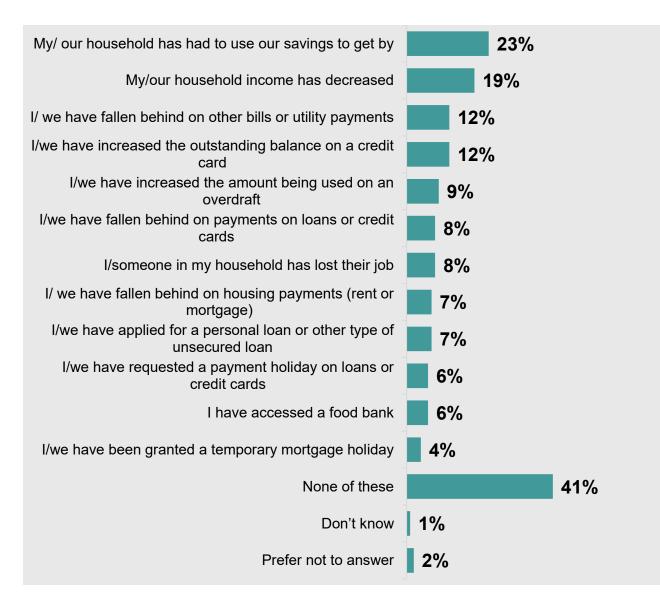
Q. How well would you say you are managing financially these days? Would you say you are ...?

Base: All adults aged 18+ in Inner/Outer London (2022: 1021) : Fieldwork dates 27th October - 9th November 2022; Source: Ipsos UK * New codes in 2022



One in four Londoners has had to use savings, and some have used credit or loans, to help with the rising cost of living

Q. Within the last 12 months, which, if any, of the following have you personally experienced, in response to rises in the cost of living?

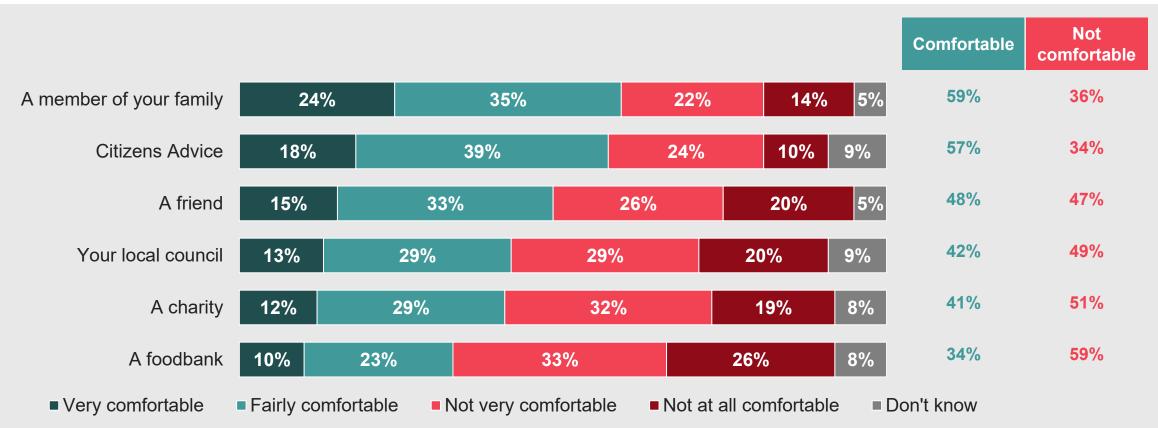


Base: All adults aged 18+ in Inner/Outer London (2022:1021) : Fieldwork dates 27th October - 9th November 2022; Source: Ipsos UK



Most would feel comfortable asking family or Citizens Advice for support, but comparatively few are comfortable asking their local council (especially private renters)

Q. If you needed support or advice to help with the rising cost of living, how comfortable, if at all, do you think you would feel asking each of the following?

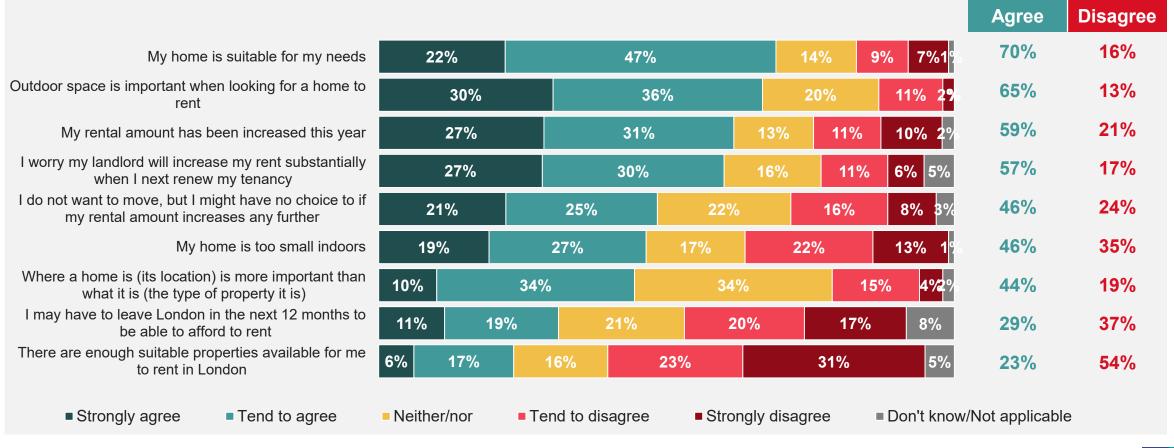


Base: All adults aged 18+ in Inner/Outer London (2022: 1021) : Fieldwork dates 27th October - 9th November 2022; Source: Ipsos UK



While most renters feel their home is suitable for their needs, many face a range of other challenges, including rising rents and limited options

Q. To what extent do you agree or disagree with each of the following statements?

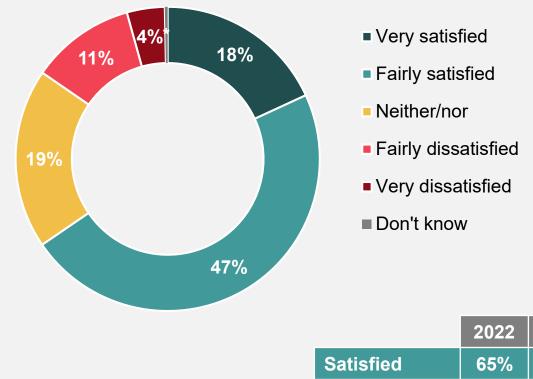


Base: All adults aged 18+ in Inner/Outer London who are currently renting (2022: 334) : Fieldwork dates 27th October - 9th November 2022; Source: Ipsos UK

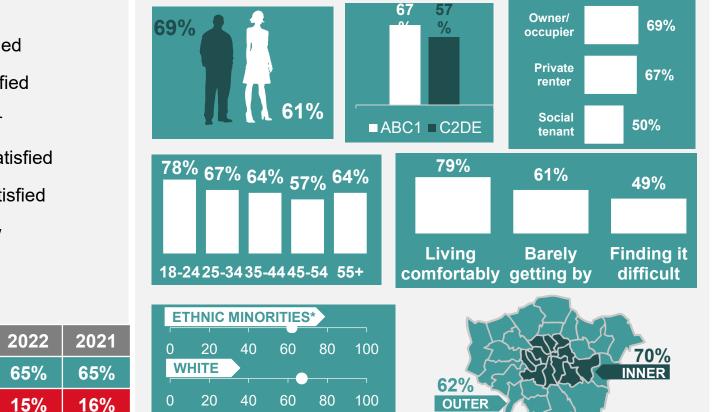


Most Londoners are still satisfied with their local area...

Q. Overall, how satisfied or dissatisfied are you with your local area as a place to live?



Among the 65% who are satisfied with their local area...



Base: All adults aged 18+ in Inner/Outer London (2022: 1021; 2021: 1000) : Fieldwork dates: 27th October - 9th November 2021

Dissatisfied

Source: Ipsos UK *Excluding white minorities

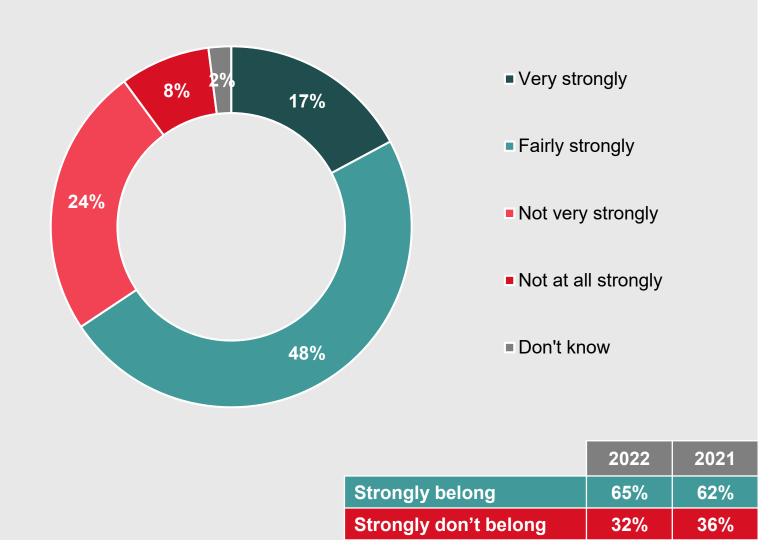
8 © Ipsos | London Councils - Survey of Londoners | December 2022 | Version 1 | Client Use Only



...and more feel strongly that they belong to their local area this year than last

Those from Ethnic Minority Groups (71%), homeowners (73%) those with children (75%) and those who are living comfortably on current income (74%) are more likely to say they feel they strongly belong to their local area compared to the London average (65%)

Q. How strongly, if at all, do you feel you belong to your local area?



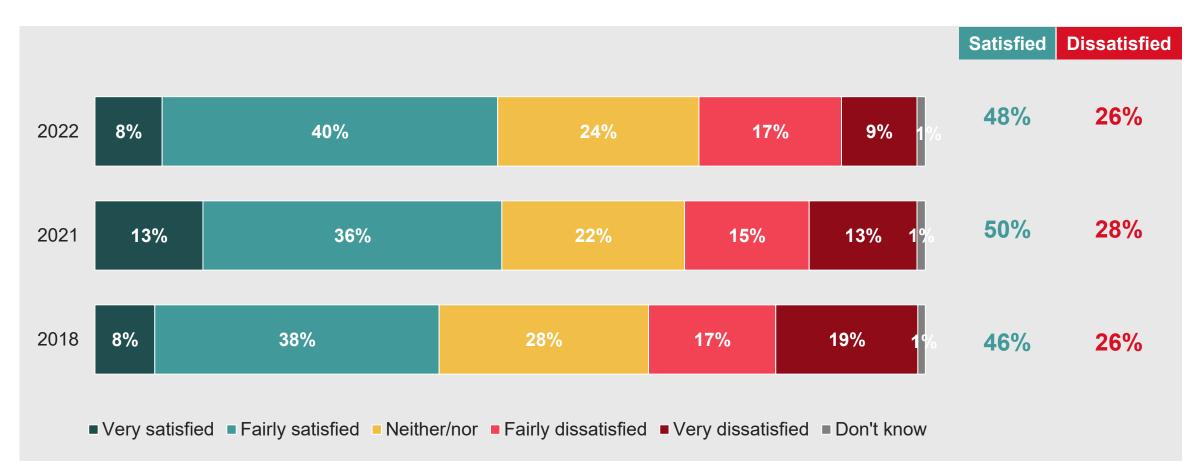
Base: All adults aged 18+ in Inner/Outer London (2022: 1021; 2021: 1000) : Fieldwork dates: 27th October - 9th November 2021

Source: Ipsos UK



Satisfaction with local councils in London has held up well through the pandemic

Q. Overall, how satisfied or dissatisfied are you with the way your local council runs things?

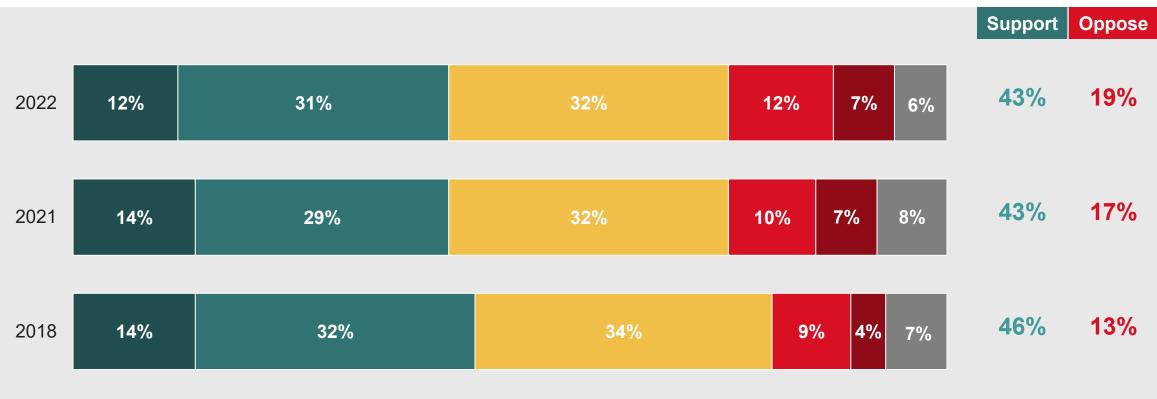


Base: All adults aged 18+ in Inner/Outer London (2022: 1021; 2021: 1000; 2018: 1000) : Fieldwork dates 27th October - 9th November 2021; Source: Ipsos UK



Meanwhile, plurality support for transferring more powers to London has remained constant in recent years...

Q. To what extent, if at all, do you support or oppose transferring more powers to London?



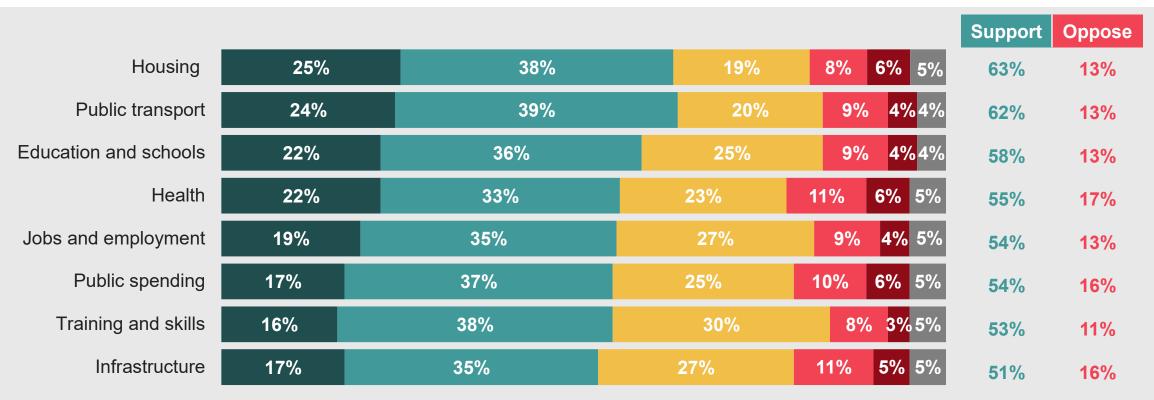
Strongly support Tend to support No feelings either way Tend to oppose Strongly oppose Don't know

Base: All adults aged 18+ in Inner/Outer London (2022: 1021; 2021: 1000; 2018: 1000) : Fieldwork dates 27th October - 9th November 2022; Source: Ipsos UK



...but Londoners are more likely support greater power transfer when framed around particularly policy areas, especially housing and transport

Q. And to what extent, if at all, do you support or oppose transferring more powers to London in each of the following areas?



Strongly support Tend to support No feelings either way Tend to oppose Strongly oppose Don't know

Base: All adults aged 18+ in Inner/Outer London (2022: 1021) : Fieldwork dates 27th October - 9th November 2022; Source: Ipsos UK



On transport and the environment, after falls last year, it appears levels of support for different initiatives have remained fairly consistent in 2022

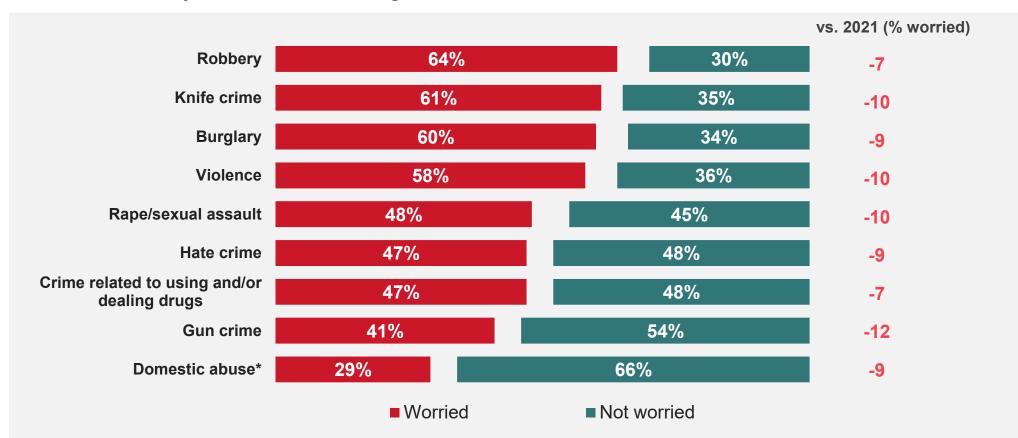
Strongly oppose Tend to oppose Neither support nor oppose Tend to support Strongly support On't know	Support	Vs. 2021
Funding more pavements, footpaths and pedestrian areas 6%9% 20% 37% 26% 3%	63%	-
Encouraging people not to use a car to travel to work or school <mark>6%9% 21% 38% 25% 3</mark> %	62%	+1
More funding for scrappage schemes to encourage people to replace their diesel/petrol cars with electric or hybrid vehicle 7%9% 19% 36% 25% 4%	61%	-1
Reducing traffic speeds in more built-up areas 9% 12% 21% 37% 18% 2%	56%	+3
Funding more cycle routes/lanes and facilities 16% 12% 21% 29% 18% 3%	47%	-2
Reallocating space away from motor vehicles to cyclists and walkers 14% 14% 22% 33% 14% 4%	47%	-
Introducing car-free days in inner London, where cars are not allowed to drive into the centre of the city	44%	-2
Only allowing access to the centre of London to electric or hybrid cars or vans on some days 17% 16% 21% 28% 14% 5%	42%	+6 🔺
Introducing 'Low Traffic Neighbourhoods' (LTNs), areas where bollards, planters and roadblocks are installed to stop motor traffic using some local roads	41%	+3
Introduce a universal road user charging scheme for all of London, which brings together all the different schemes* 18% 12% 25% 25% 13% 4%	38%	n/a
Converting car parking spaces into parking spaces for rental bikes, e-bikes and e-scooters* 19% 17% 28% 21% 9%5%	30%	n/a

Q. In principle, to what extent would you support or oppose introducing the following policies in London?

Base: All adults aged 18+ in Inner/Outer London (2022: 1021; 2021: 1000) : Fieldwork dates 27th October - 9th November 2022; Source: Ipsos UK * New codes in 2022



While many continue to be worried about being a victim of a range of different crimes, levels of worry have fallen since 2021



Q. How worried are you, if at all, about being a victim of each of these crimes in London?

Base: All adults aged 18+ in Inner/Outer London (2022: 1021; 2021: 1000). Fieldwork dates 27th October - 9th November 2022; 27th October - 15th November 2021.

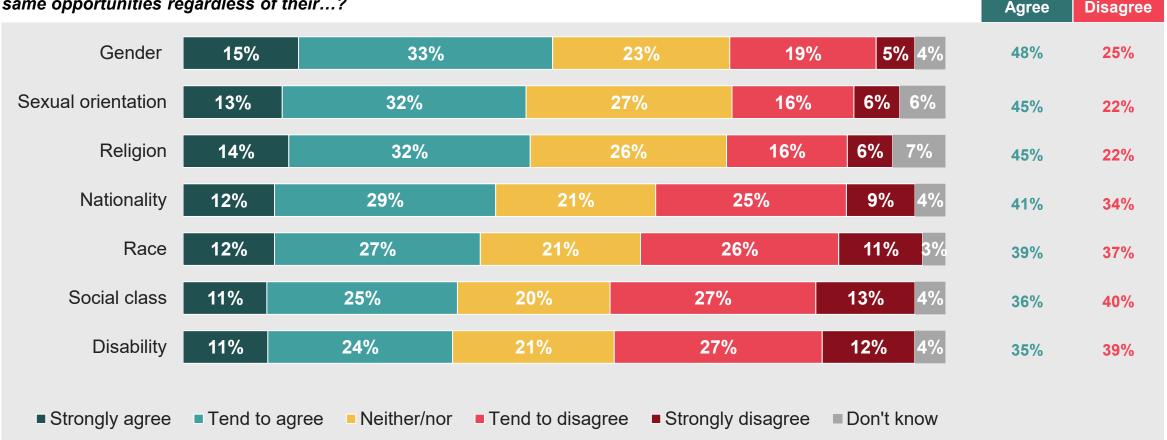
Source: Ipsos

* This option was "Domestic Violence" in 2021

14 © Ipsos | London Councils - Survey of Londoners | December 2022 | Version 1 | Client Use Only

An unequal city? We are split on the extent to which all living in London have equal access to the same opportunities

Q. To what extent, if at all, do you agree or disagree that everyone living in London currently has equal access to the same opportunities regardless of their...?



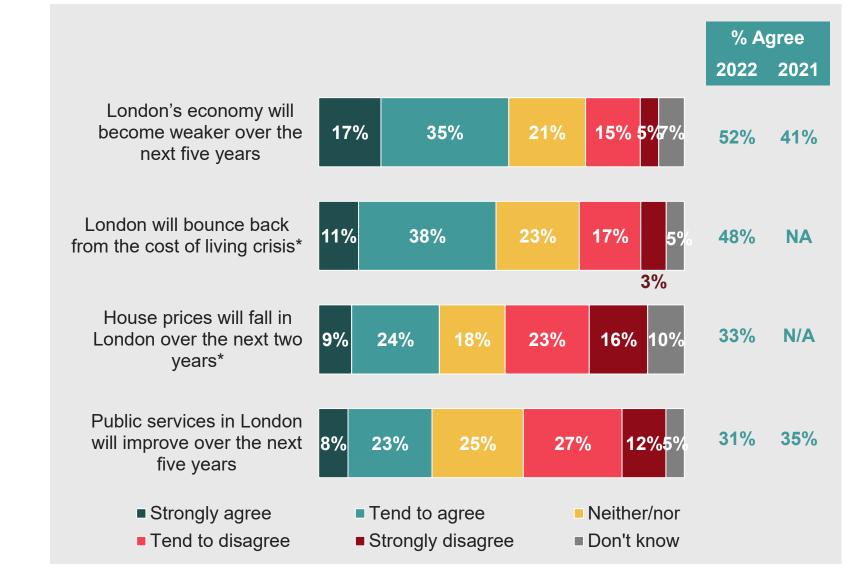
Base: All adults aged 18+ in Inner/Outer London (1021) : Fieldwork dates 27th October - 9th November 2022 Source: Ipsos



Disagree

Londoners are bullish about the capital's ability to bounce back from the cost of living crisis, but less sure about the future of London's economy and public services

Q. To what extent do you agree or disagree with each of the following statements?

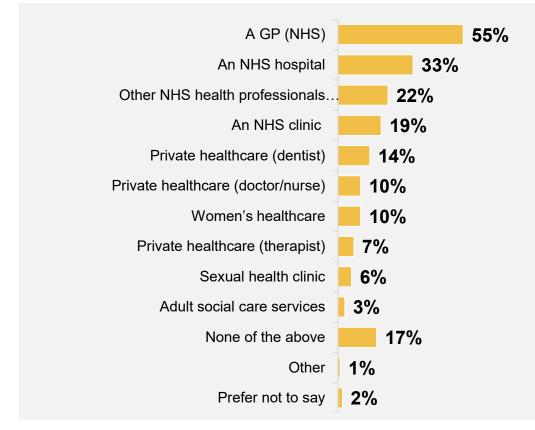


Base: All adults aged 18+ in Inner/Outer London (2022: 1021) : Fieldwork dates 27th October - 9th November 2022 Source: Ipsos



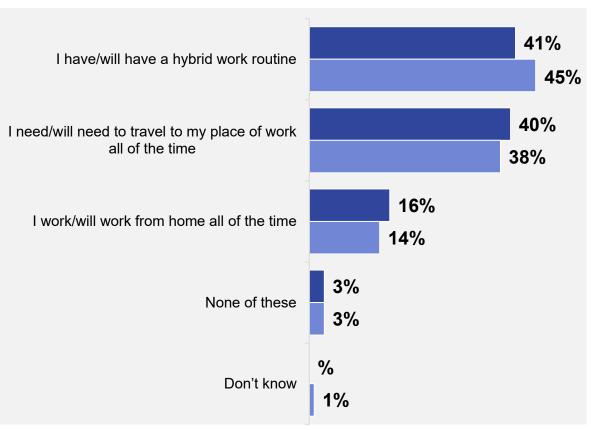
And finally... a plug for this year's survey – much more on health, asylum seekers/refugees, domestic abuse and the future of hybrid working

Q. Which, if any, of the following health services have you accessed in the last 12 months?



Base: All adults aged 18+ in Inner/Outer London (1021) : Fieldwork dates 27th October - 9th November 2022

Q. Which, if any, of the following best describes your <u>current</u> work situation/your work situation over the <u>next 12 months</u>?



Base: All adults aged 18+ in Inner/Outer London who are in work (721)

Source: Ipsos UK



In summary...

- 1. Cost of living is the key story this year we saw it emerging as early as 2018, but it dominates now
- Some Londoners are struggling financially, and are taking (risky) steps to cope. Many would be uncomfortable asking councils for help. How can you tackle this perception and stop people, especially private renters, falling through the cracks?
- 3. Against this backdrop, renters are navigating a range of housing challenges
- 4. Despite the challenges, most are satisfied with their local area and feel a sense of belonging
- 5. Satisfaction with councils has made it through the pandemic intact too
- 6. Support for devolution has remained steady for many years now, but in principle support appears to increase for specific policy areas, especially transport and housing
- 7. Many believe London is **not equal**, particularly by race, social class and disability
- 8. We tend to feel the capital will recover from the cost of living crisis, but have real concerns about the future of the economy and the impact on public services

Over to you!



Thank you.

Lewis Hill, Research Director Lewis.Hill@ipsos.com

Lore Bizgan, Research Manager Lore.Bizgan@ipsos.com

