Research Report

Richmond Residents' Survey 2014

Prepared for: London Borough of Richmond-Upon-Thames

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Prepared for: London Borough of Richmond-Upon-Thames

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1 Background and methodology

1.1 Survey aims and objectives

This report summarises the results of a bespoke piece of research into the perceptions Richmond borough residents hold in relation to their Council and the local area. A representative sample of 1,403 residents aged 16 and over were interviewed by telephone between October and December 2014 in order to provide fresh data on Council performance and priorities.

The objectives of this research were as follows:

- To measure overall perceptions of Richmond Council's performance and the value for money it provides.
- To record the perceived quality of the services that are experienced by all residents such as refuse and recycling collections, street cleaning and road and pavement maintenance.
- To examine support for possible approaches to service delivery and cost savings ahead of the setting of the 2015/16 budget.
- To record how engaged residents are with Richmond Council and with their wider community.
- To explore how residents perceive the condition of their local high streets.
- To benchmark the perceptions of Richmond residents where possible using national data collected by the Local Government Association.

1.2 Methodology

1,403 interviews were completed by BMG Research between the 6th October and the 8th December 2014. Randomly generated telephone numbers (RDD sample) were used in combination with mobile numbers attributable to the Richmond area in order to ensure that a good cross section of residents took part in the research. All survey participants were asked to provide their postcode so that they could be attributed to one of the 14 villages that make up the borough. Interviewing targets were set by village and also by age and gender at the borough level so that a full cross section of the population took part in the research. After fieldwork, weights were applied to the data by village, gender, age and ethnicity to correct any differences in the profile of the sample relative to the borough's population.

1.3 Questionnaire

A bespoke questionnaire was used for this survey. The questionnaire used questions taken from the equivalent 2012 and 2013 surveys to allow public opinion to be monitored year on year, plus new questions to explore key issues for the Council in 2014/15. Several questions were asked in such a way to allow the responses to be benchmarked against polling conducted nationally by the Local Government Association.

1.4 Report contents

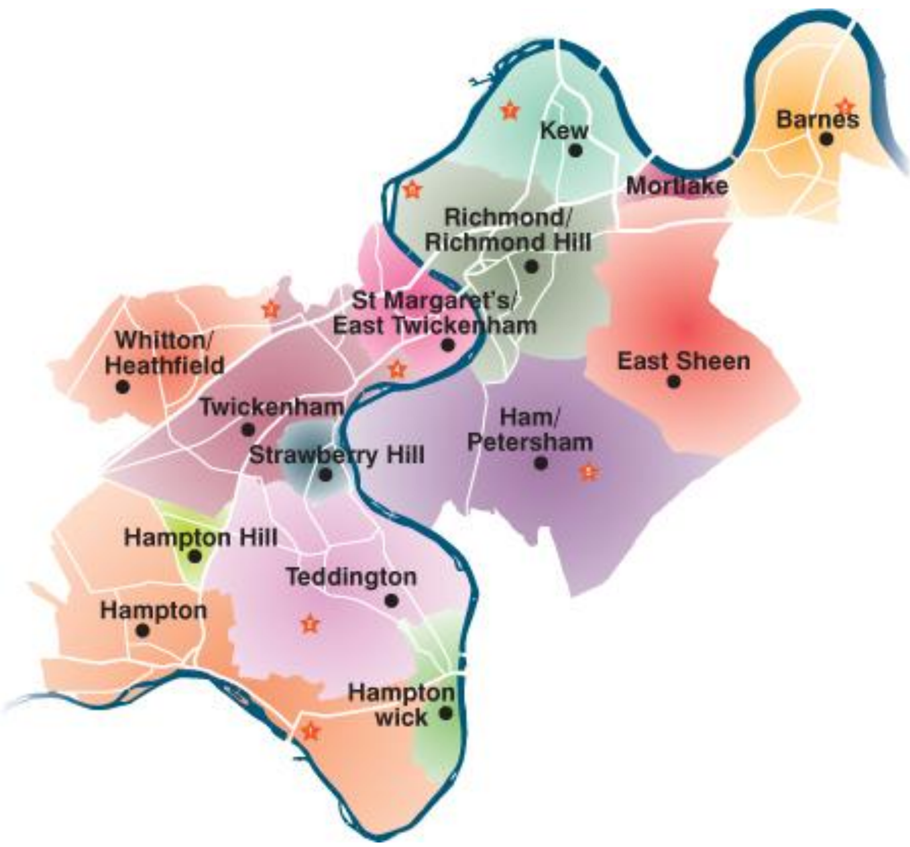
This document contains a concise summary of the key findings to emerge from this survey. It aims to highlight the positive messages in the data, plus any areas of concern that require further consideration.

The data used in this report is rounded up or down to the nearest whole percentage point. It is for this reason that, on occasions, tables or charts may add up to 99% or 101%. Where tables and graphics do not match exactly to the text in the report this occurs due to the way in which figures are rounded up (or down) when responses are combined. Results that differ in this way should not have a variance that is any larger than 1%.

When a figure is shown in bold and underlined within a table this denotes that this figure is significantly different (determined by the t-test) to one or more opposing figures. The t-test is a statistical method used to evaluate the differences between two opposing groups. Results described as significant in this report will have been identified by this test as substantial variations in opinion.

Throughout the report reference will be made to villages. The boundaries of these village catchments are shown by the map below.

Figure 1: Definition of geographical units used in analysis



2 Key findings

2.1 Perceptions of Richmond Council

Four in five (83%) residents remain satisfied with the way the Richmond Council is running the area which is identical to the proportion recorded in 2013. Alongside this, 62% of residents agree that Richmond Council provides good value for money. This is a 5-percentage point increase compared to 2013 and a 14-percentage point increase from the 48% seen in 2012. Nationally, perceptions regarding whether Councils provide value for money have been close to 50% since January 2013 suggesting the perceptions of Richmond residents in both 2013 and 2014 on this subject have been above average.

Trust in the Council appears to fallen slightly from the 79% of residents who indicated that they trusted Richmond Council a great deal or fair amount in 2013 to 75% in 2014. In 2012 74% indicated that they trusted Richmond Council and therefore current trust levels are consistent with those seen two year ago. On this basis the 4-percentage point drop in trust is not a dramatic decline, but in the current context when potentially difficult decisions will be required to balance the budget, ensuring residents have trust and confidence that the authority is making the best decisions for the borough as a whole is desirable.

Seven in ten residents (70%) believe that Richmond Council acts on the concerns of local residents either a great deal (13%) or a fair amount (57%). This overall proportion is in line with the 70% seen in 2013. There is also no change in the proportion who currently feel informed about Richmond Council's services and benefits (63% vs. 62% in 2013). This proportion remains below the latest LGA national benchmark (66% - Oct 2014), but as shown below the views given by Richmond residents generally compare positively to those given in national polling.

Table 1: Summary of key survey indicators

Question	2012 (%)	2013 (%)	2014 (%)	Change from 2013 (% points)	LGA April Oct 14 national benchmark - (%)
% residents satisfied with the local area	93%	96%	96%	0	82%
% residents satisfied with the way the Council runs things	77%	83%	83%	0	68%
% residents agree who agree the Council provides value for money	48%	57%	62%	+5	51%
% residents informed about Council services and benefits	57%	62%	63%	+1	66%
Acts on concerns - a great deal / a fair amount	67%	70%	70%	0	61%
Trust Council - a great deal / a fair amount	74%	79%	75%	-4	59%

2.2 Service satisfaction and priorities

More than eight in ten residents are satisfied with the universal services of refuse collection (89%), recycling services (87%) and street cleaning (84%). Satisfaction with road and pavement maintenance are recorded 58% and 56% respectively. Compared to 2013, the satisfaction levels recorded for these universal services are unchanged with the exception of road maintenance, for which satisfaction has risen by 3-percentage points. This rise coincides with a period when a Community Roads & Pavements Fund has been implemented. While direct causation between the two cannot be proved, it is possible that this initiative is being noticed by residents.

National polling by the LGA has collected data on a small selection of Council services. In October 2014:

- 75% of residents nationally expressed satisfaction with street cleaning in their local area (Richmond 84%);
- 42% were satisfied with road maintenance (Richmond 58%);
- 56% were satisfied with pavement maintenance (Richmond 56%);

Therefore the views of Richmond residents are more positive than the national average in relation to street cleanliness and roads, and satisfaction equals the national benchmark for pavement maintenance.

Looking forward, the top three priorities for the Council to improve are all related to highways and car use. Firstly, 31% of residents state that road maintenance needs to be a priority, with a further 30% selecting pavement maintenance. Parking services is the third highest priority with 23% stating this should be a priority. Notably all three of these issues also made up the top three priorities in 2012 and 2013. Therefore these issues are consistently perceived by Richmond residents as requiring attention.

2.3 Perceptions of the local area

When considering the area within 15–20 minutes walking distance from their home, the vast majority of residents (96%) indicate that they are satisfied with their local area as a place to live (96% in 2013). With this proportion well above the national benchmark of 82% this finding emphasises the continued desirability of the borough.

Rubbish and litter is the neighbourhood issue most commonly described as a problem to some extent by Richmond residents (17%), but within this only 4% indicate that this is a very big problem.

Just 5% of Richmond residents state that they have been a victim of crime and anti-social behaviour in the last month. This is consistent with the 5% recorded in 2013.

Perceptions of community cohesion in the local area are improving. In 2014 more than eight in ten (86%) residents agree that people from different ethnic backgrounds get on well together locally. This is a 7-percentage point improvement on 2013 when 79% gave the same response. Within this overall finding the proportion of residents who give the most positive response of 'definitely agree' has risen from 37% to 50%.

Three quarters of residents are satisfied with their local high street overall (76%) and four in five are satisfied with its appearance (79%). The safety of high streets continues to be rated highly as 89% of residents express satisfaction with the safety of the area in which their high street is located, but only 67% are satisfied with the range of shops available. While satisfaction with Richmond high streets overall is stable (74% in 2013, 76% in 2014), in the last year there has been a 4-percentage point increase in those expressing satisfaction with the appearance of their local high street. This increase is encouraging in the context of recent high street improvement work that has been taking place throughout the borough.

2.4 Communications and engagement

When considering how they would prefer to contact Richmond Council, the highest proportion of residents would prefer to use e-mail (39%) and the telephone (38%). This is the first time that the preference for online contact has matched that seen for the consistently popular telephone channel. A further 11% would prefer to make contact via the Council's website. Combining the preferences for e-mail and website contact shows half of residents (50%) now favour some means of electronic contact. This is important information for future channel shift strategies.

More than six in ten residents (63%) currently feel informed about Richmond Council's services and benefits. However, 36% of residents feel that they only receive a limited amount of information from the Council or indeed that it doesn't tell them much at all about what it does. Alongside this, two in five (23%) residents feel that they are kept informed about Council plans to deal with any proposed reductions to their budget.

The fact that only a minority feel informed about this issue (42% feel they have limited information about this and 26% say the Council doesn't tell them much at all about what it does in this respect) raises the question of the level of awareness and preparedness for future cuts or changes to services in the context of a challenging budget position. While the recent Autumn Statement has resulted in renewed national coverage about the scale of the budget savings required in the public sector, this finding does suggest that any significant changes to service delivery will need to be accompanied by a strong communications narrative about why this is necessary.

In the context of shaping future Council communications, all residents were asked if they have seen any of four local information sources. In response, two thirds of residents (67%) indicate that they had seen the Richmond & Twickenham Times during the past 6 months. This suggests that the messages within this publication are likely to play an important part in shaping public opinion. In the same period 54% had seen the Richmond Council website (53% in 2013) and 37% had seen village newsletters (34% in 2013).

Just over half of residents (52%) feel that the Council takes account of residents' views when making decisions. Among the remainder, 24% neither agree nor disagree, 20% disagree and 4% don't know. Views on whether residents can work with the Council to affect change are even stronger with 61% agreeing and 14% disagreeing this is the case. The proportion of residents who agree that the Council takes account of residents' views when making decisions at 52% is unchanged from the 51% seen a year ago.

2.5 Budget issues

The responses given by Richmond residents to possible approaches to the 2015/16 budget suggest that the approach of freezing Council Tax in 2015/16 and minimising increases thereafter is supported by 77% of residents. No information on the budgetary implications of this decision was provided to respondents. Only 11% of residents disagree with a Council Tax freeze. Alongside this effective freeze on Council income, 73% of residents feel that spending should be reduced by seeking greater efficiency in service delivery and 47% would support reduced spending on some non-essential services. Views on whether charges for some services should be increased are more polarised, with similar proportions agreeing with this approach (41%) and disagreeing (35%). Comparing these views to those seen in 2013, the key shift evident is a 5-percentage point increase in agreement for increasing charges for some services to help cover costs (36% to 41%).

Two new approaches were included in this question in 2014 to explore public views on alternative models of service delivery. When asked about Richmond Council commissioning services with a company or charity, with the Council retaining a role of overseeing quality, six in ten residents (60%) agree with such an approach.

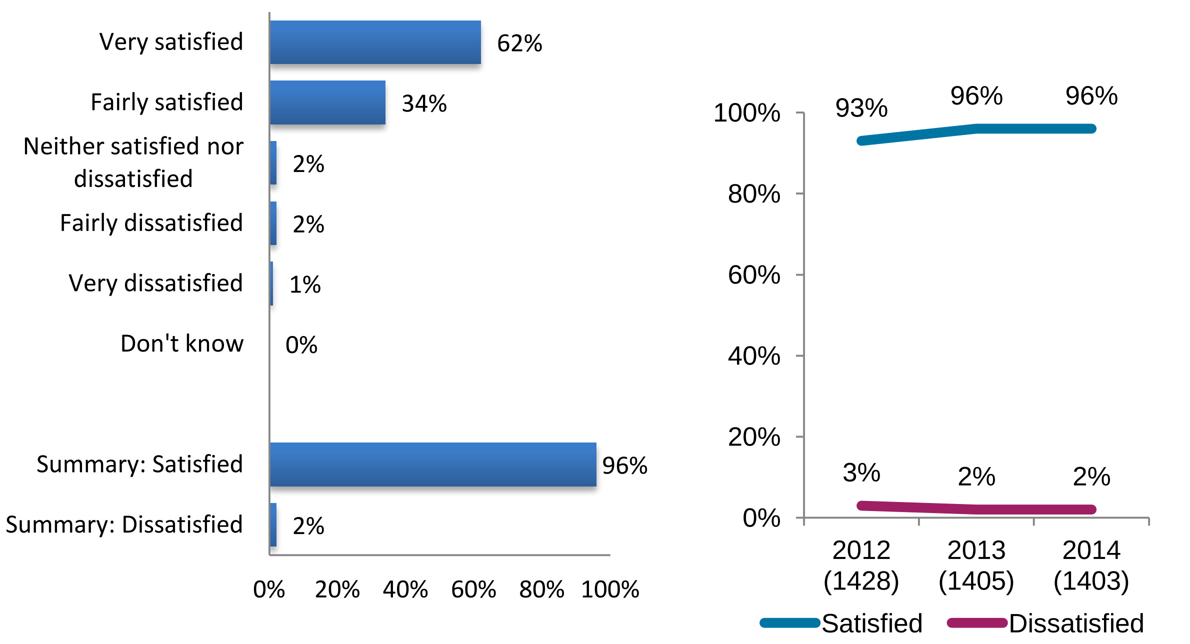
Even higher agreement is seen for Richmond Council undertaking joint working or sharing services with other public bodies or other Councils (74%). More specifically, residents were told that the Council has set out plans to explore closer joint working with Kingston Council in order to find more efficient ways to deliver services. In response, 77% of residents agree with this approach including 39% who give the most positive response of strongly agree. Conversely, just 13% of residents oppose this approach.

3 Perceptions of the local area

3.1 Local area as a place to live

When considering the area within 15–20 minutes walking distance from their home, the vast majority of residents (96%) indicate that they are satisfied with their local area as a place to live. This proportion is unchanged from 2013 (96%). In 2014 62% give the most positive response of 'very satisfied' which is in line with the 64% seen a year ago. Just 2% of residents have a neutral opinion of their local area, while a further 2% state that they are dissatisfied with their local area as a place to live.

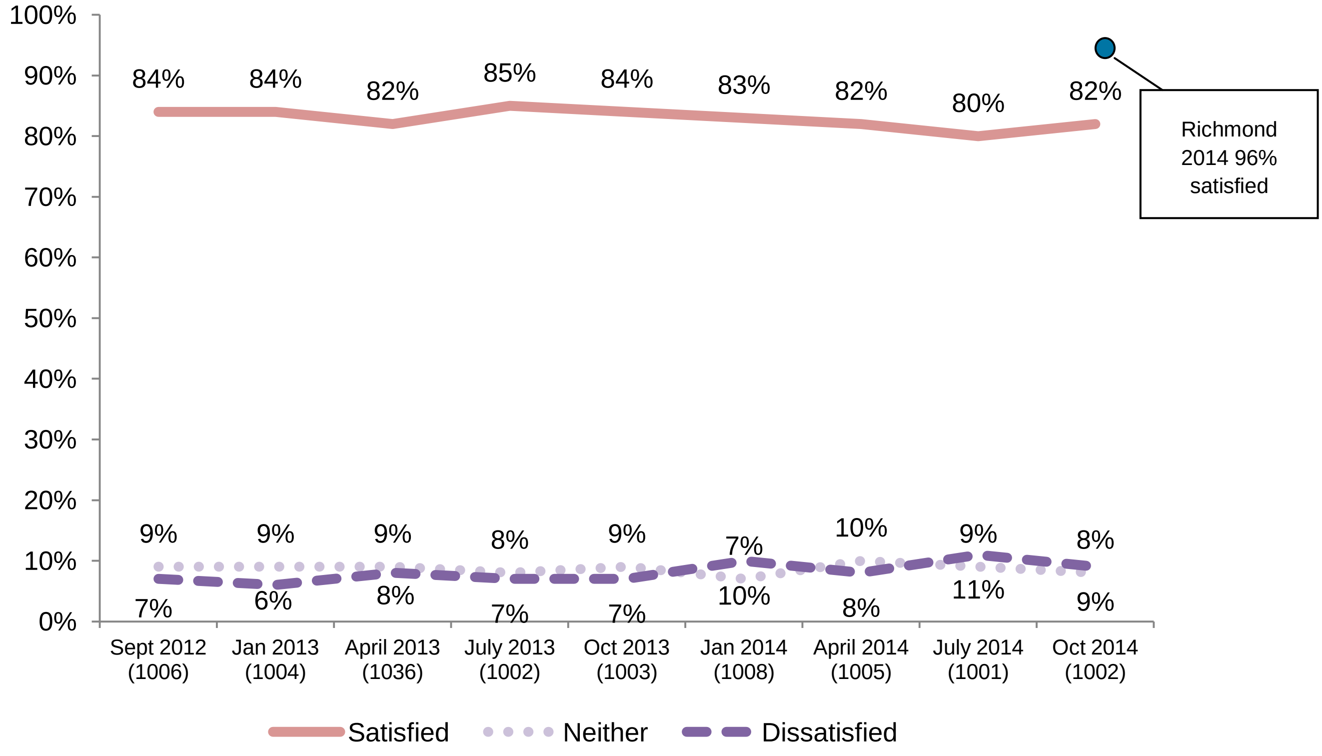
Figure 2: Overall, how satisfied or dissatisfied are you with your local area as a place to live? (All responses)



Unweighted sample bases in parenthesis

The fact that more than nine in ten Richmond residents are satisfied with their local area clearly demonstrates the desirability of the borough as a place to live. This is further emphasised by the fact that this figure of 96% is above the national benchmark for this question. Nine waves of polling have been completed by the Local Government Association (LGA) nationally using a comparable telephone methodology as the one used in this research. The data produced in this polling can therefore be used to benchmark the Richmond results. LGA data from October 2014 shows 82% of respondents nationally being either very or fairly satisfied with their local area as a place to live, meaning that the autumn 2014 figure of 96% for Richmond is considerably above the norm. The 96% satisfaction recorded among Richmond residents in autumn 2013 was also above the benchmark figure of 84% recorded at that time.

Figure 3: National trend in satisfaction with the local area as a place to live– LGA Polling

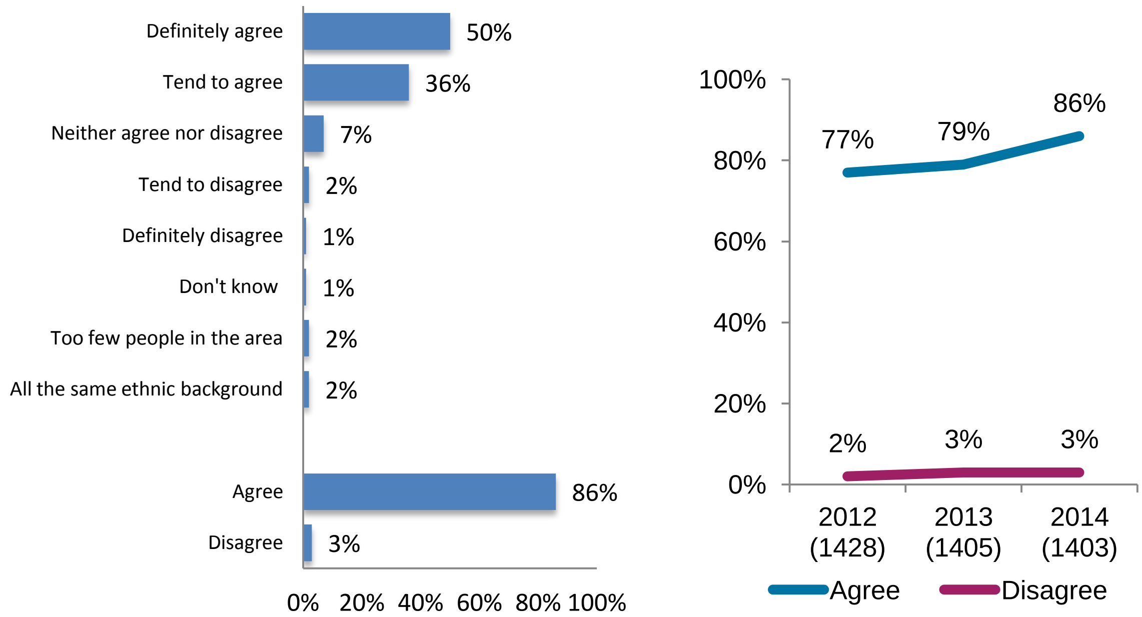


Looking at responses by village shows that in all but one of the 14 villages within the borough at least nine in ten residents express satisfaction with their local area as a place to live. The exception is Whitton in which 89% express satisfaction with the local area (88% in 2013). However, only 3% of residents in Whitton express dissatisfaction with their local area as a place to live, a proportion that is half that seen a year ago (6%). Overall, dissatisfaction with the local area does not vary by village to any statistically significant extent.

3.2 Community cohesion

In order to understand the sense of community cohesion felt among Richmond borough residents, respondents to the survey were asked to indicate whether they feel that people from different ethnic backgrounds get on well together in their local area. In response, more eight in ten (86%) residents agree that people from different ethnic backgrounds do get on well together locally. This is a 7-percentage point improvement on 2013 when 79% gave the same response. Within this overall finding the proportion of residents who give the most positive response of ‘definitely agree’ has risen from 37% to 50%.

Figure 4: To what extent do you agree or disagree that your local area is a place where people from different ethnic backgrounds get on well together? By getting on well together, we mean living alongside each other with respect. (All responses)

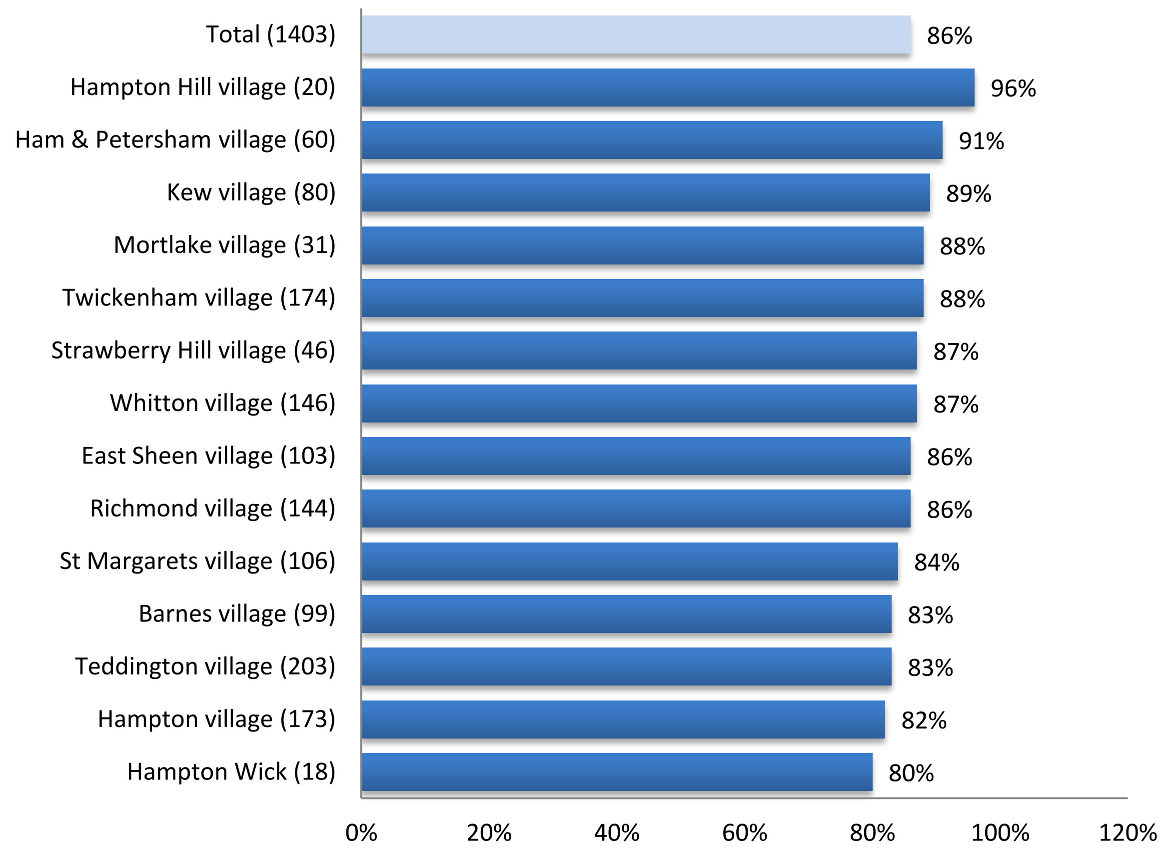


Unweighted sample bases in parenthesis

Given that the focus of this question is the level of cohesion between different ethnic groups it is important to examine whether perceptions of this issue vary by ethnicity. Looking at responses by ethnic group, no statistically significant variations are apparent, although it should be noted that white residents make up the majority of the sample. This finding is consistent with 2013.

The proportion of residents who agree that people of different ethnic backgrounds get on well together is consistent by village with no statistically significant variations evident. Agreement peaks at 96% in Hampton Hill and 91% in Ham and Petersham although the base sizes in both of these villages are relatively small. Agreement per village is shown in the figure below.

Figure 5: Agreement that people of different ethnic backgrounds get on well together by village (All responses)



Unweighted sample bases in parentheses

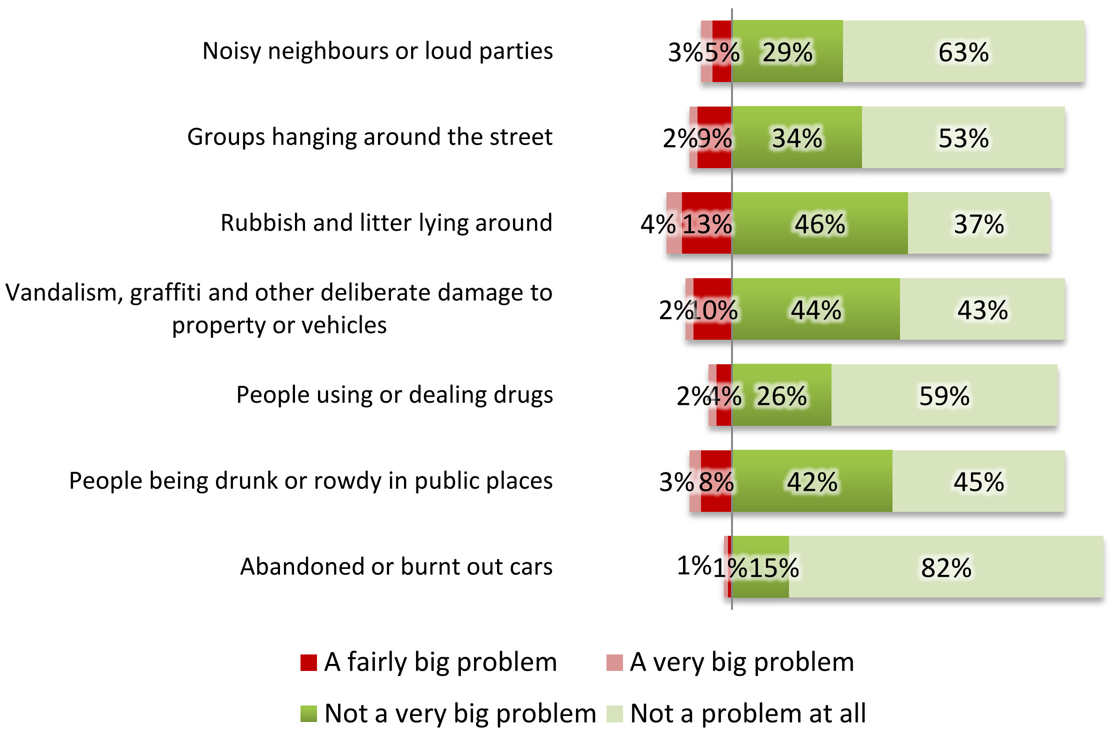
3.3 Crime and anti-social behaviour

On the basis that concerns about crime and anti-social behaviour can be detrimental to quality of life, all residents were asked to indicate how serious they feel seven key issues are in the local area. In response, each of these issues is described as a problem by a minority of residents. In total the following proportions describe each issue as either a 'very big' or a 'fairly big' problem:

- Rubbish and litter lying around (17%);
- Vandalism, graffiti and other deliberate damage to property or vehicles (12%);
- Groups hanging around the street (11%);
- People being drunk or rowdy in public places (11%);
- Noisy neighbours or loud parties (8%);
- People using or dealing drugs (6%); and
- Abandoned or burnt out cars (2%).

In 2013 traffic congestion also featured in the list of local issues and was the most commonly chosen response. However, this option was removed in 2014 to give a tighter focus on crime and anti-social behaviour issues. The full breakdown of responses is shown by the figure below. This shows that although rubbish and litter is most commonly described as a problem to some extent, only 4% indicate that this is a very big problem

Figure 6: Seriousness of crime and anti-social behaviour issues in the local area (All responses)



Unweighted sample base: 1403

The proportion of Richmond residents who feel these featured issues are a problem is generally consistent with the proportions seen in 2013. However, as shown by the table below between 2012 and 2014 the trajectory of those citing crime and anti-social behaviour issues as a problem appears to be downwards.

Table 2: Issues perceived as problems locally 2012-14 (All responses)

	% a problem 2012	% a problem 2013	% a problem 2014	% point change 2013-14
Noisy neighbours or loud parties	10%	8%	8%	0
Groups hanging around the street	17%	14%	11%	-3
Rubbish and litter lying around	21%	16%	17%	+1
Vandalism, graffiti and other deliberate damage to property or vehicles	16%	13%	12%	-1
People using or dealing drugs	8%	6%	6%	0
People being drunk or rowdy in public places	16%	13%	11%	-2
Unweighted sample base:	**1428**	**1405**	**1403**	

In order to identify any locations where particular issues are perceived to be more acute analysis of responses by village has been undertaken. This shows the following significant variations:

- Residents of Hampton and Whitton are significantly more likely to say that groups hanging around on the street are a problem (both 21% vs. 11% for the borough overall).
- Those living in Mortlake (28%) and Twickenham (26%) most commonly say that rubbish and litter lying around is a problem.
- The proportion who feel that vandalism and graffiti is a problem peaks at 28% among Mortlake residents.
- A significantly higher proportion of Whitton residents state that people using or dealing drugs are a problem (12%).
- Residents of Twickenham (20%) and Whitton (17%) most commonly feel that people being drunk and rowdy in public is a problem to some extent.

Although even at their extremes these proportions still represent a minority view, it is important to understand these spatial variations of perceptions of anti-social behaviour.

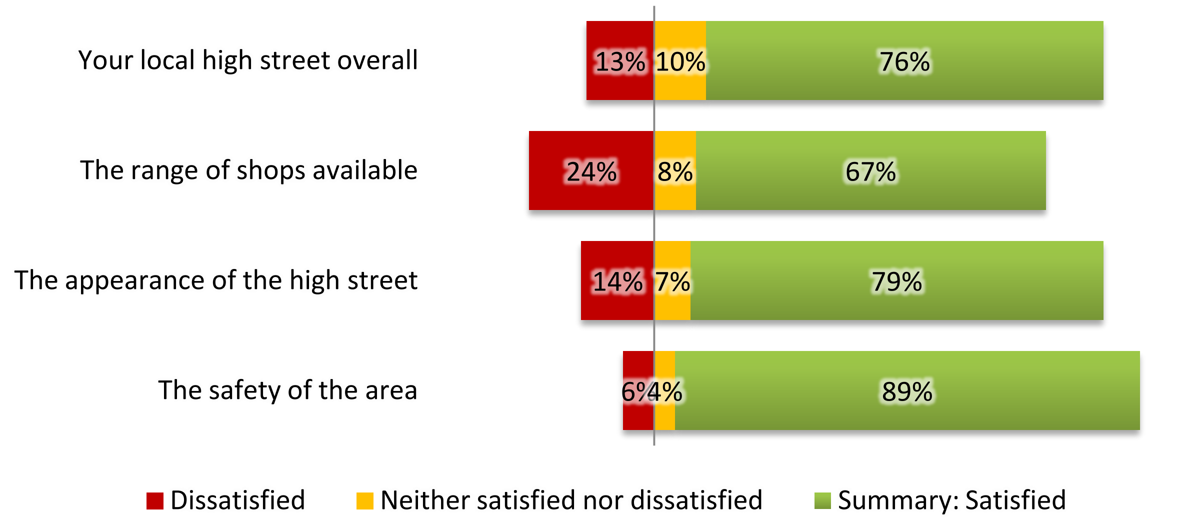
3.4 Incidence of crime and anti-social behaviour

To put above results into context just 5% of Richmond residents state that they have been a victim of crime and anti-social behaviour in the last month. This is consistent with the 5% recorded in 2013 and the 6% who gave the same response in 2012. Analysis by village shows no significant variation of crime and ASB experience in 2014.

3.5 Perceptions of local high streets

The current economic situation remains challenging for retailers of all sizes. The pressure on household incomes coupled with changing consumer habits has led to considerable media and political consideration of the future of high streets across the country. In this context Richmond residents were asked to provide their views on their local high street. As shown by the figure below, the majority of Richmond residents continue to view their high streets in a positive manner. Three quarters are satisfied with their local high street overall (76%) and four in five are satisfied with its appearance (79%). The safety of high streets continues to be rated highly as 89% of residents express satisfaction with the safety of the area in which their high street is located, but only 67% are satisfied with the range of shops available.

Figure 7: Thinking about your local high street, how satisfied or dissatisfied are you with the following...? (All responses)



Unweighted sample base: 1403

While satisfaction with Richmond high streets overall is stable (74% in 2013, 76% in 2014), in the last year there has been a 4-percentage point increase in those expressing satisfaction with the appearance of their local high street.

Table 3: Satisfaction with elements of local high street 2012-14 (All responses)

	% satisfied 2012	% satisfied 2013	% satisfied 2014	% point change 2013-14
Your local high street overall	78%	74%	76%	+2
The range of shops available	69%	65%	67%	+2
The appearance of the high street	77%	75%	79%	+4
The safety of the area	88%	87%	89%	+2
Unweighted sample base:	**1428**	**1405**	**1403**	

In order to provide greater depth to these findings all residents were asked to state the name of their local high street with an extensive list of 38 options provided in the survey script for interviewers to refer to. In the following table views on the satisfaction with high street elements where there is a sample base of at least 20 per location to use for analysis are shown. Some of these sample bases are small and therefore the results should be treated with caution. Those stating that their local high street is Twickenham least commonly give a positive rating of their high street overall (46%), and are less satisfied with its appearance (51%) and the range of shops (40%). This may be related to the fact that Twickenham high street has been experiencing some disruption throughout ongoing improvement works.

Table 4: High street ratings by local high street (All responses where high street base is 20 or more)

	Unweighted sample base	Your local high street overall -% satisfied	The range of shops available -% satisfied	The appearance of the high street -% satisfied	The safety of the area -% satisfied
Total	**1403**	76%	67%	79%	89%
Richmond (major)	**226**	81%	75%	87%	91%
Twickenham (district)	**193**	46%	40%	51%	83%
East Sheen (district)	**72**	89%	84%	83%	92%
Teddington (district)	**195**	91%	80%	94%	93%
Whitton (district)	**114**	88%	80%	93%	90%
Barnes	**79**	74%	53%	83%	93%
Hampton Hill	**146**	74%	69%	71%	82%
Hampton Village	**32**	72%	64%	76%	89%
Kew Gardens Station	**21**	87%	78%	85%	93%
St Margarets	**35**	90%	75%	86%	94%
Whitton Road	**25**	86%	81%	77%	87%

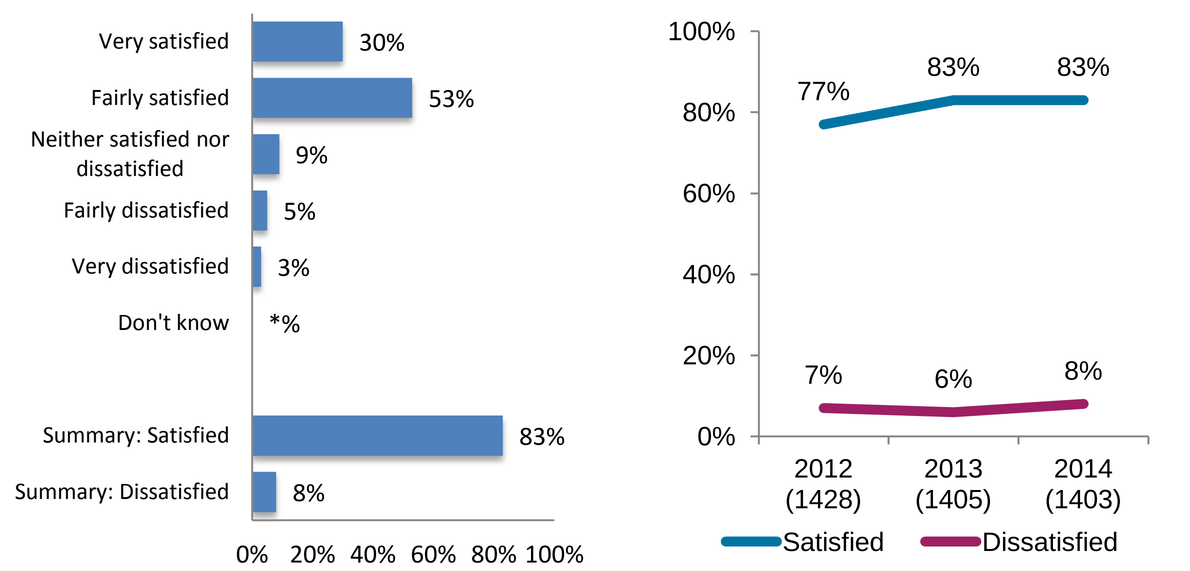
4 Perceptions of Richmond Council

4.1 Overall satisfaction

The survey questionnaire reminded residents that Richmond Council is responsible for a range of services such as refuse collection, street cleaning, planning, schools, social care services and road maintenance.

When considering their satisfaction with how Richmond Council run things, 83% respond positively suggesting that they are satisfied. This is the same proportion as was observed in 2013. Within the 2014 results, three in ten (30%) residents are very satisfied (28% in 2013), while more than half (53%) of residents are fairly satisfied (54% in 2013). Just one in twelve (8%) residents indicate that they are dissatisfied with how Richmond Council run things, with a similar proportion (9%) giving a neutral response.

Figure 8: Overall, how satisfied or dissatisfied are you with the way Richmond Council runs things? (All responses)



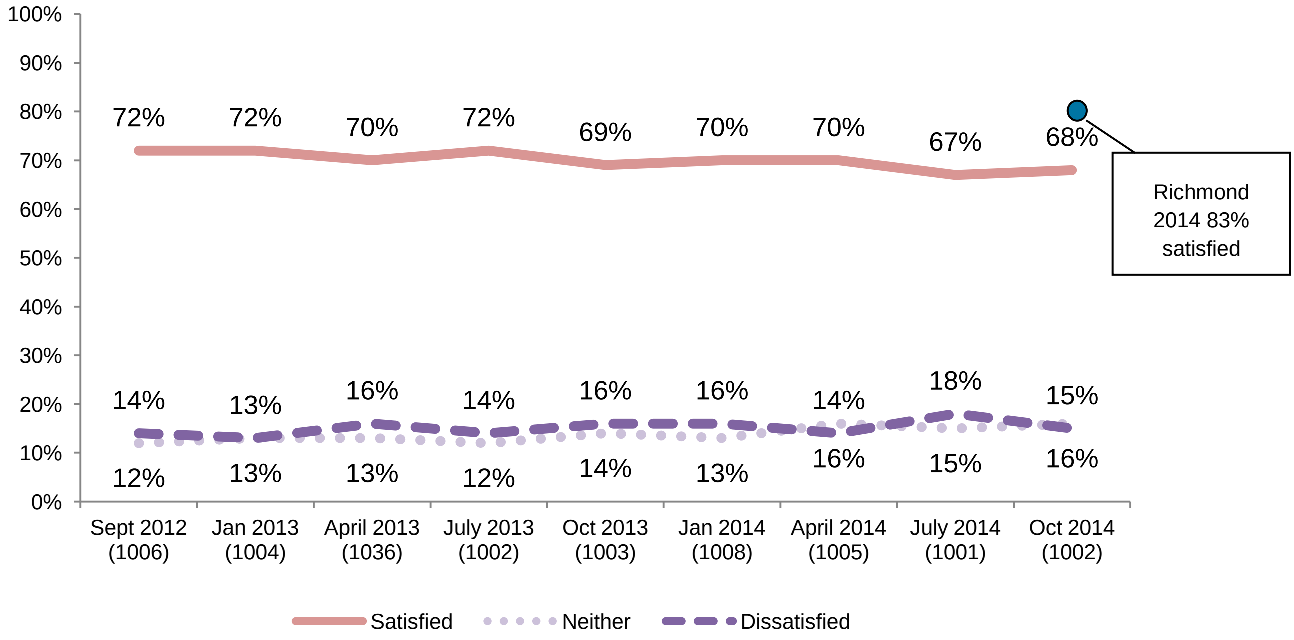
Unweighted sample bases in parentheses

* denotes less than 0.5%

The wording of this question is consistent with that used in recent polling undertaken by the Local Government Association (LGA) into perceptions of local authorities. The level of satisfaction with the way Richmond Council runs things seen in this research (83%) is 15 percentage points above the latest national benchmark of 68% (LGA Oct 2014)

The national trend on this key measure is shown by the figure below. This suggests that seven in ten residents being satisfied with their local authority has been the norm between 2012 and 2014. Back in autumn 2012, 77% of Richmond residents expressed satisfaction with the way their Council was running things, as did 83% in 2013 suggesting consistently above average perceptions of the authority and its performance.

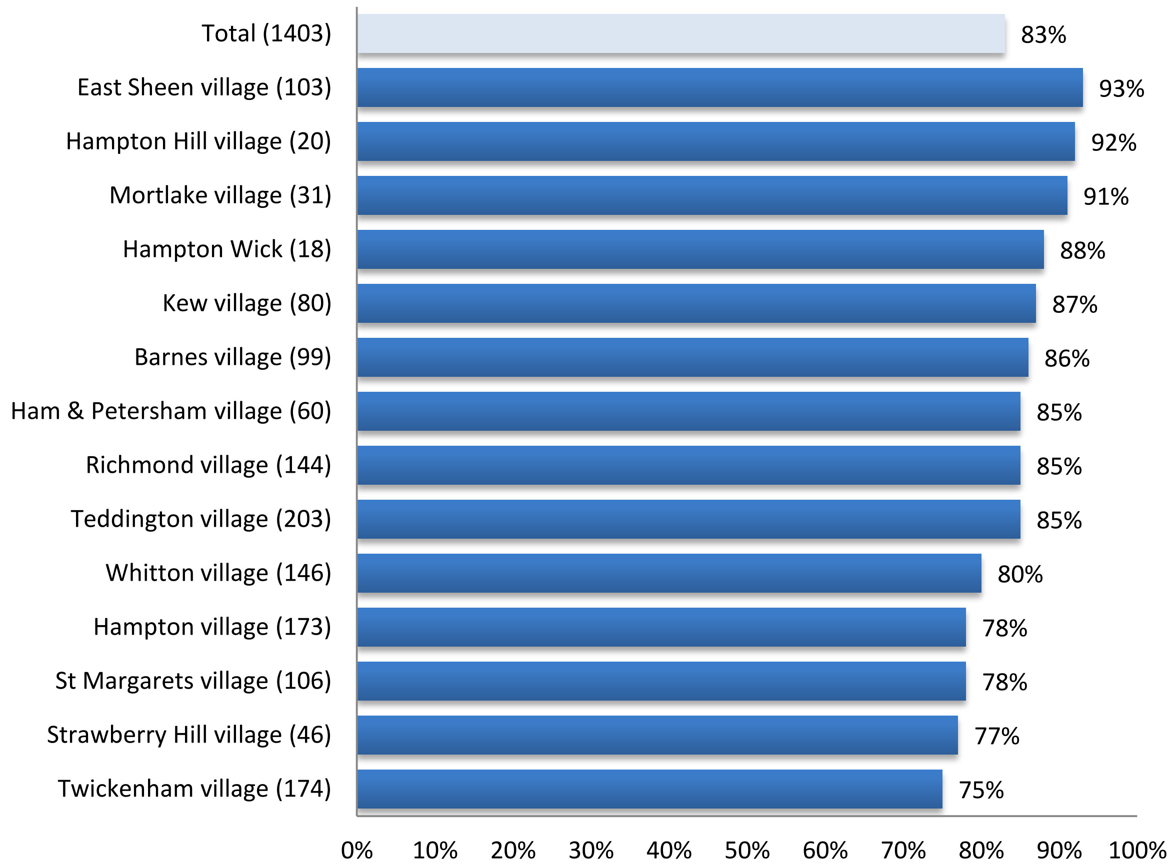
Figure 9: National trend in satisfaction with the way Councils run things – LGA Polling



Unweighted sample bases in parentheses

Looking at responses by village shows consistently high levels of satisfaction with the way Richmond Council runs things. Dissatisfaction peaks at 13% among residents of Hampton village.

Figure 10: Satisfaction with the way Richmond Council runs things by village (All responses)



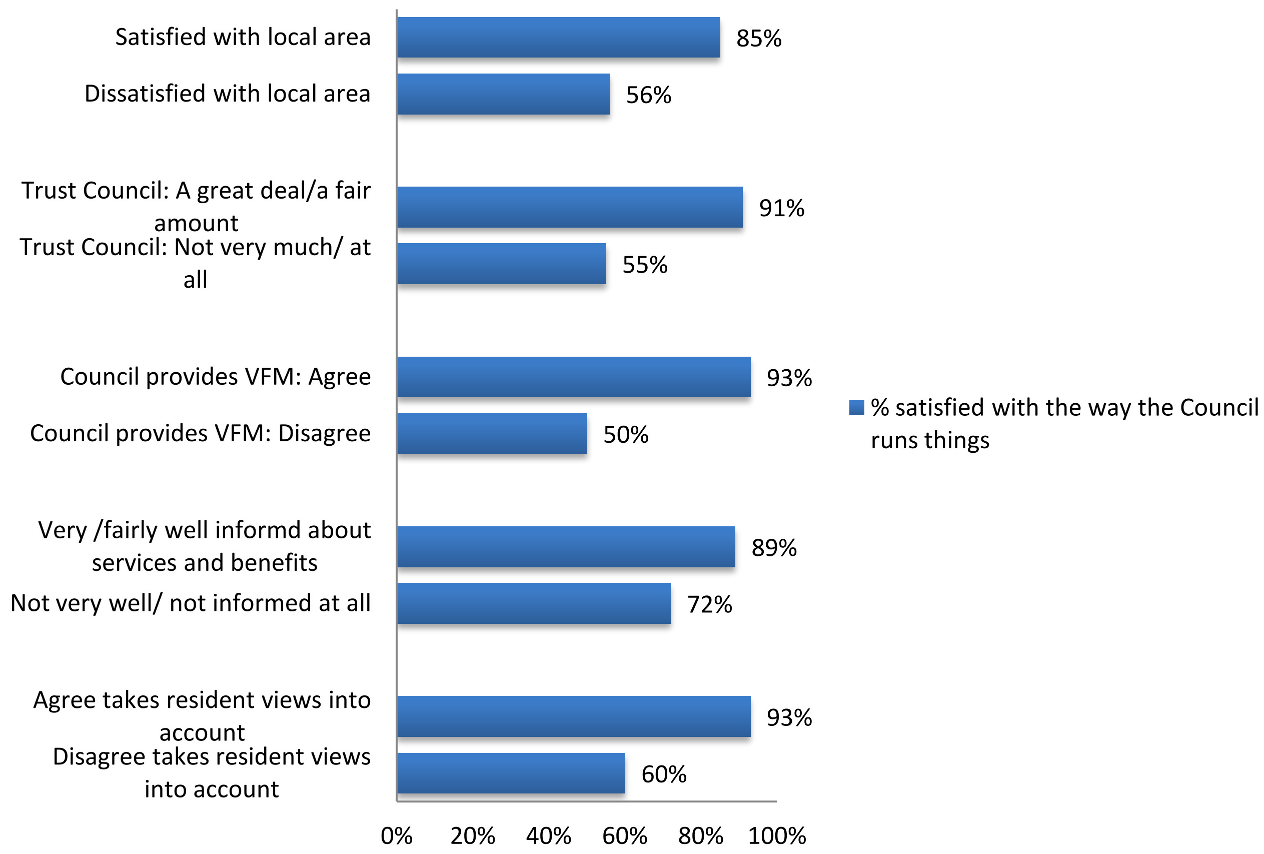
Unweighted sample bases in parentheses

Looking at responses by age, it is residents aged 55-64 who are most likely to express dissatisfaction with the way Richmond Council runs things (11%).

Further analysis also shows clear interactions between satisfaction with the way the Council runs things and other views captured in the survey. Among those who feel that Richmond Council offers value for money, 93% are satisfied with the authority. Among those who disagree value for money is provided the proportion expressing satisfaction with the way the Council is running things drops significantly to 50%. A significant interaction is also evident between how informed residents feel and satisfaction with the Council. Among those who feel either fairly or very well informed about Council services and benefits 89% are satisfied with how the Council runs things compared to 72% of those who do not feel well informed.

These interactions in opinion are summarised in the figure below. All of the percentages shown are those expressing satisfaction with the way that Richmond Council run things.

Figure 11: Interaction of perceptions of the Council and other views (All responses)

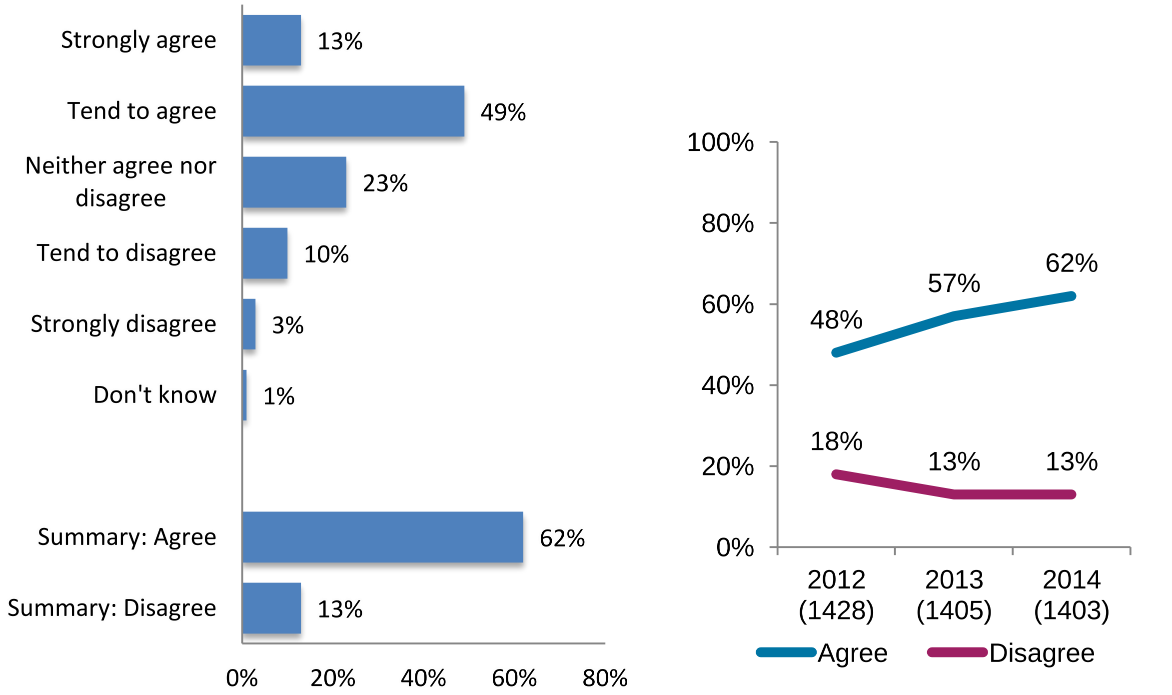


4.2 Value for money

Residents were also asked to comment on the value for money Richmond Council provides. In doing so respondents were asked to think about the range of services the Council provides to the community as a whole, as well as the services their household uses. Residents were told that it did not matter if they do not know all of the services Richmond Council provides to the community and that general opinions were welcome.

In response, 62% of residents agree that Richmond Council provides good value for money. This is a 5-percentage point increase compared to 2013. A further 23% give a neutral response on this matter (27% in 2013) while 13% disagree (unchanged). With disagreement unchanged, the rise in positive views on the Council offering value for money appears to be due to fewer residents neither agreeing nor disagreeing this is the case.

Figure 12: To what extent do you agree or disagree that Richmond Council provides good value for money? (All responses)



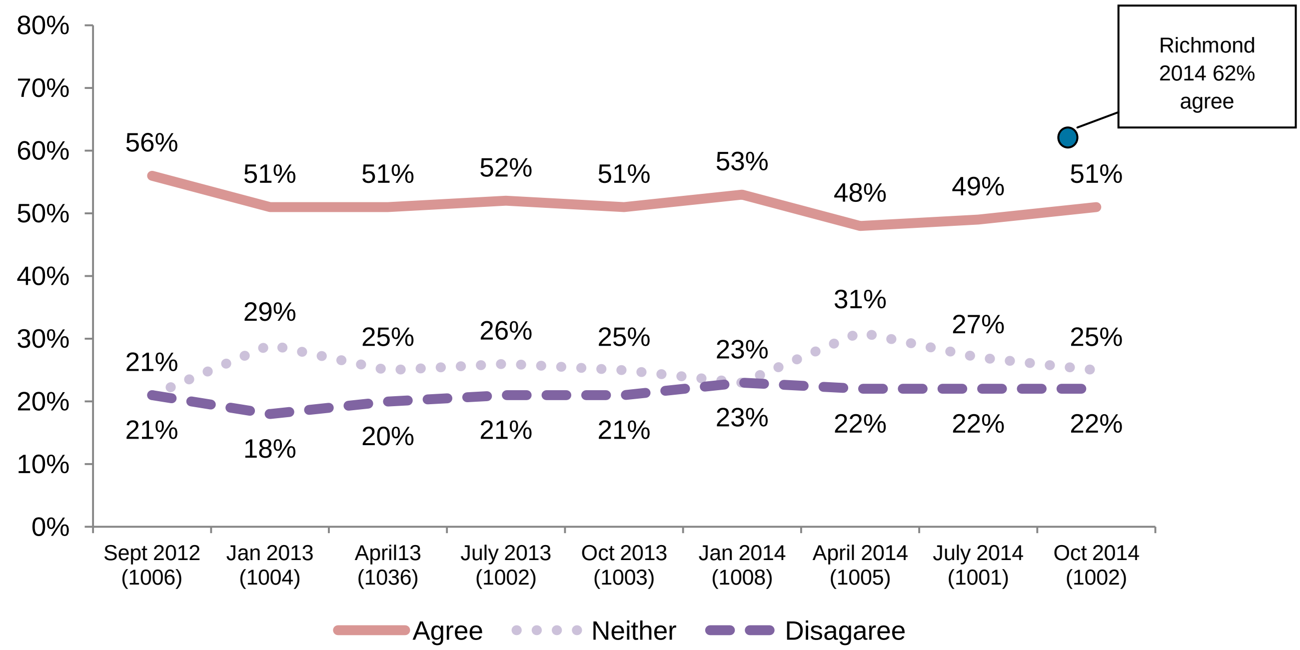
Unweighted sample base: 2013: 1405 2012: 1428

Agreement that the Council provides value for money shows significant variation by age. The proportion who agree that Richmond Council provides value for money is significantly higher among those aged 65 and over (73%) compared with those aged between 16 and 64 (60%). This was also the case in 2013. As will be shown later in the report older residents are those most likely to indicate that they feel well informed about Council services and benefits. Among those who do feel informed in this respect 72% agree that the Council provides value for money. In comparison, among those who do not feel informed about services and benefits this agreement is significantly lower at 47%.

At village level agreement that Richmond Council provides value for money is significantly higher among Kew residents (76%). Disagreement peaks among residents of Twickenham (19%) and Whitton (18%).

The current level of agreement that Richmond Council gives local people good value for money is 11 percentage points above the latest national benchmark of 51% (LGA Oct 14). Nationally, perceptions regarding whether Councils provide value for money have been close to 50% since January 2013 suggesting the perceptions of Richmond residents in both 2013 and 2014 on this subject have been above average.

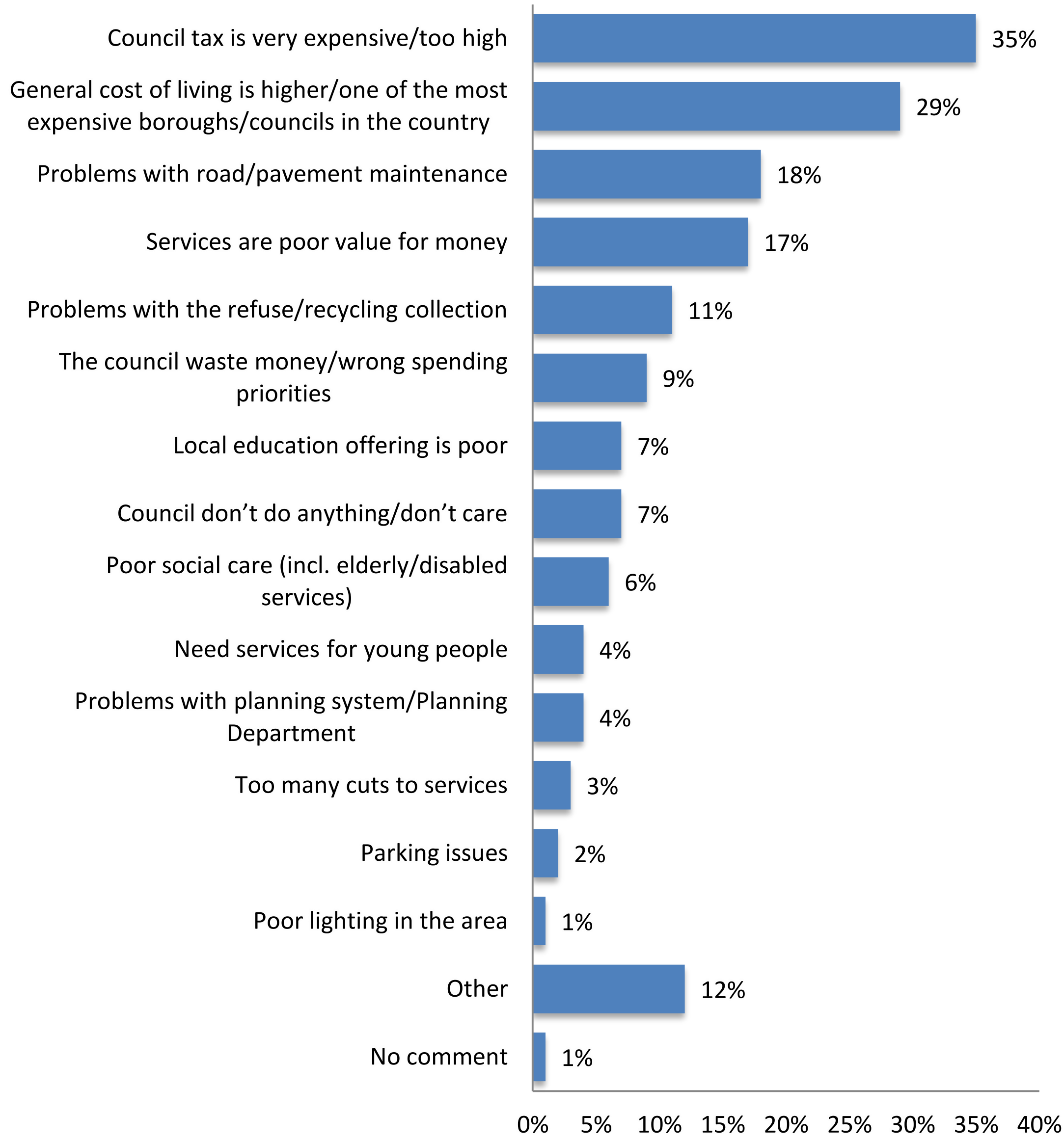
Figure 13: National trends in perceptions of Councils providing value for money– LGA Polling



Unweighted bases in parentheses

While six in ten residents currently agree Richmond Council provide good value for money there clearly remains scope to raise this proportion further. To understand how this might best be achieved a new question was added to the 2014 survey which asked those who are dissatisfied in terms of value for money to indicate in their own words why this is. The responses given were grouped into themes after the completion of fieldwork so that responses could be quantified. Analysis of the responses given shows that a third (35%) feel that Council Tax is expensive / too high and a further 29% made general comments about the local cost of living. Beneath this 18% mentioned problems with road/pavement maintenance and 17% said services are poor value. The full range of responses given is shown by the figure below.

Figure 14: Reasons given for disagreeing that Richmond Council provides good value for money (All those who disagree)

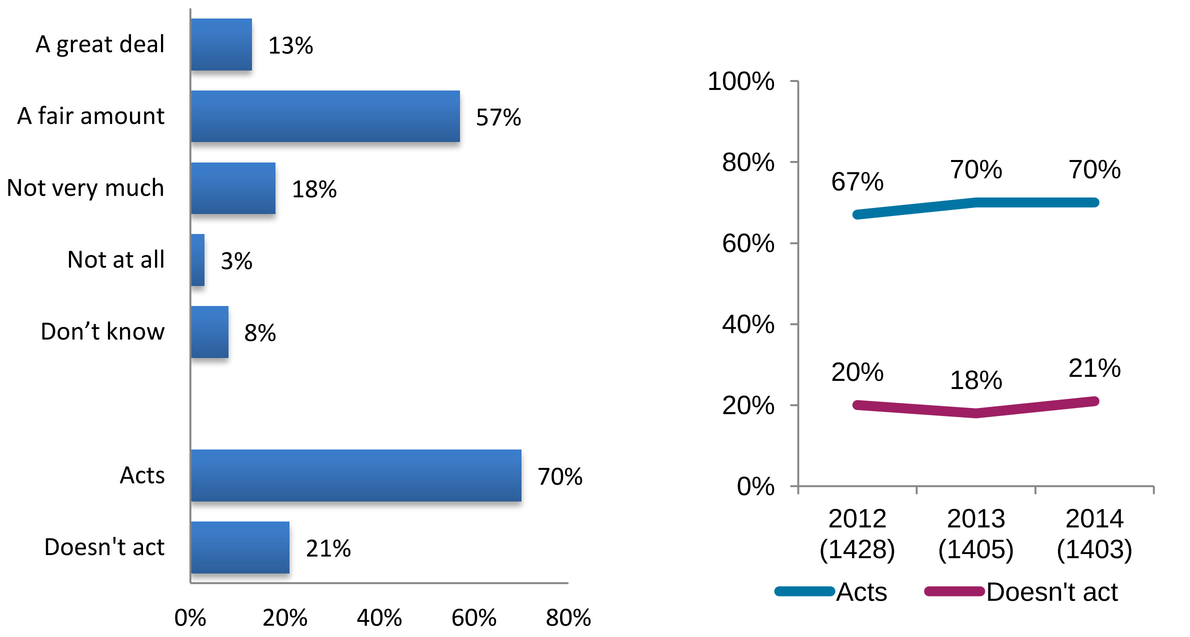


Unweighted sample base: 178

4.3 Acting on local concerns

Probing perceptions of Richmond Council further shows that seven in ten residents (70%) believe that Richmond Council acts on the concerns of local residents either a great deal (13%) or a fair amount (57%). This overall proportion is in line with the 70% seen in 2013. In 2012, 67% gave the same response. While these results are again highly positive there would appear to be scope to further enhance public perceptions on this measure given that 8% are unsure about how responsive the Council is to residents' concerns. However, it should be noted that this proportion is down from 12% a year ago.

Figure 15: To what extent do you think Richmond Council acts on the concerns of local residents? (All responses)

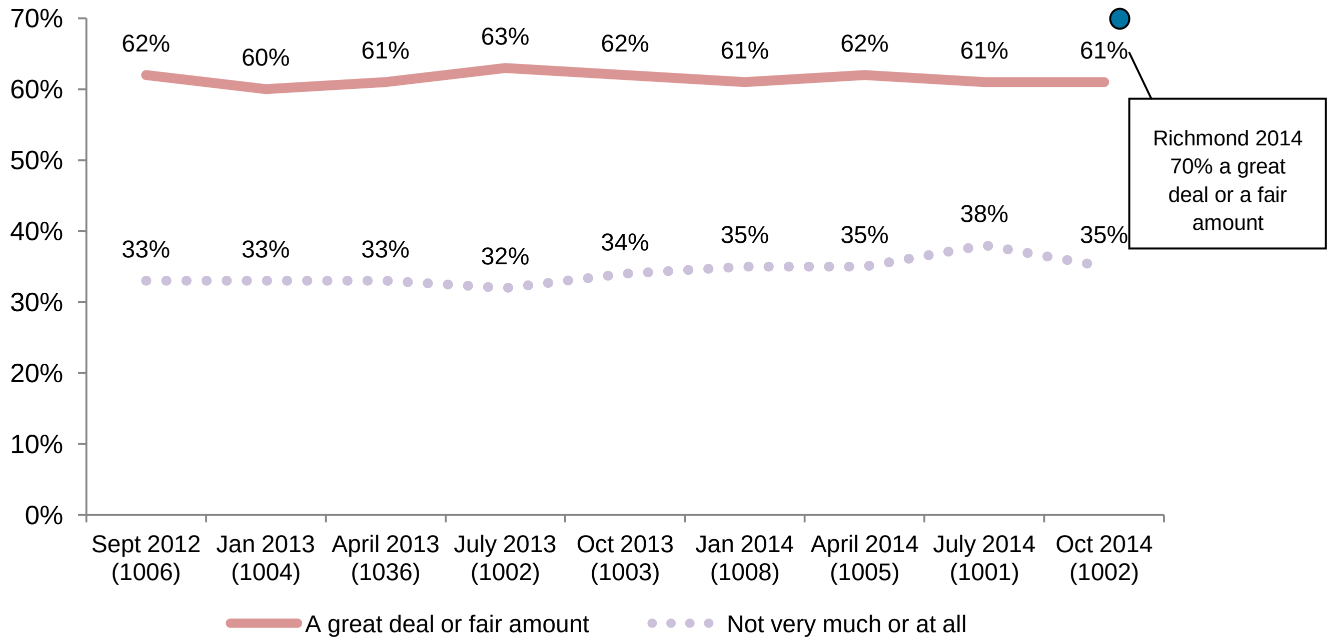


Unweighted sample bases in parenthesis

As was seen in 2013, in terms of age it is younger residents, i.e. those aged 16-34 who most commonly feel that Richmond Council acts on the concerns of local residents. Among this group 77% feel this is the case to some extent, compared to 66% among those aged 35-54, 68% of those aged 55 to 64 and 71% of those aged 65 and over.

To put these results into context, LGA polling using the same question shows that nationally 61% of respondents in October 2014 felt that their Council was acting on the concerns of residents. With the latest figure from Richmond residents being 70%, this clearly illustrates above average perceptions of the authority in terms of consulting and engagement.

Figure 16: National trends in perceptions of Councils acting on the concerns of residents – LGA Polling

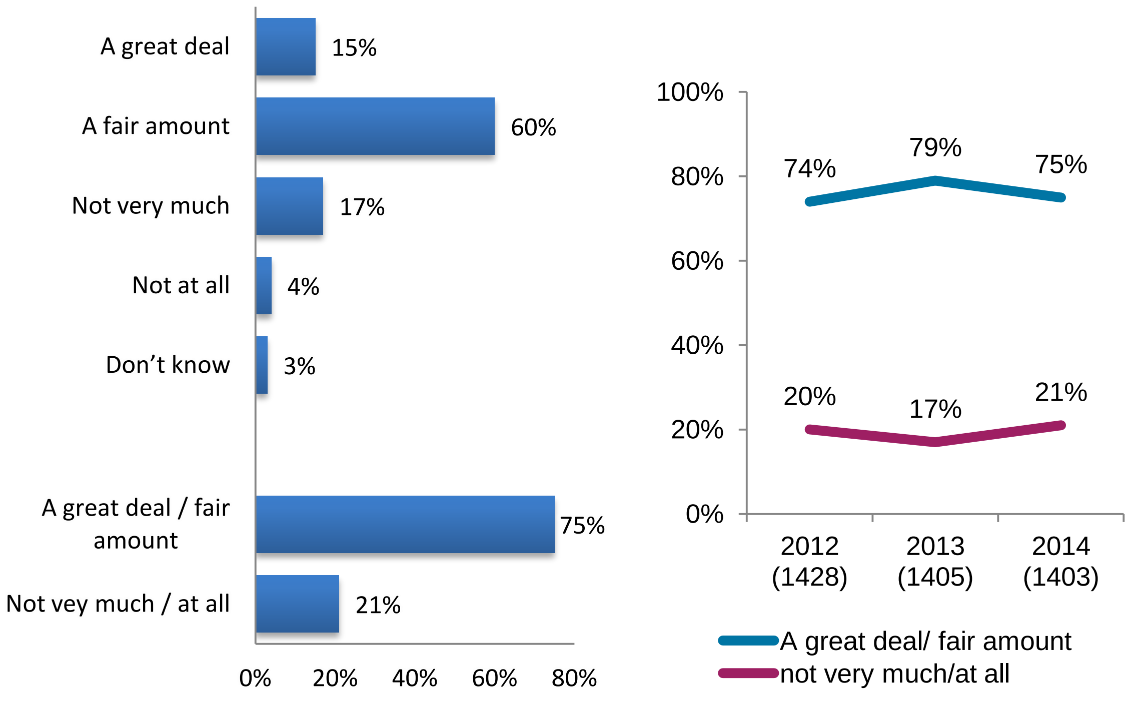


4.4 Trust

In order to further understand the relationship between Richmond Council and its residents, all survey respondents were asked to indicate the extent to which they trust their Council. In response, 15% of residents indicate that they trust Richmond Council a great deal, and a further 60% state that they trust the Council a fair amount. A further 17% of residents indicate that they don't trust the Council very much, while 4% state that they don't trust the Council at all.

Trust in the Council appears to fallen slightly from the 79% of residents who indicated that they trusted Richmond Council a great deal or fair amount in 2013 to 75% in 2014. This 2014 proportion is in line with the 74% seen two years ago in 2012. On this basis this 4-percentge shift does not represent a dramatic decline, but in the current context when potentially difficult decisions will be required to balance the budget, ensuring residents have trust and confidence that the authority is making the best decisions for the borough as a whole is desirable.

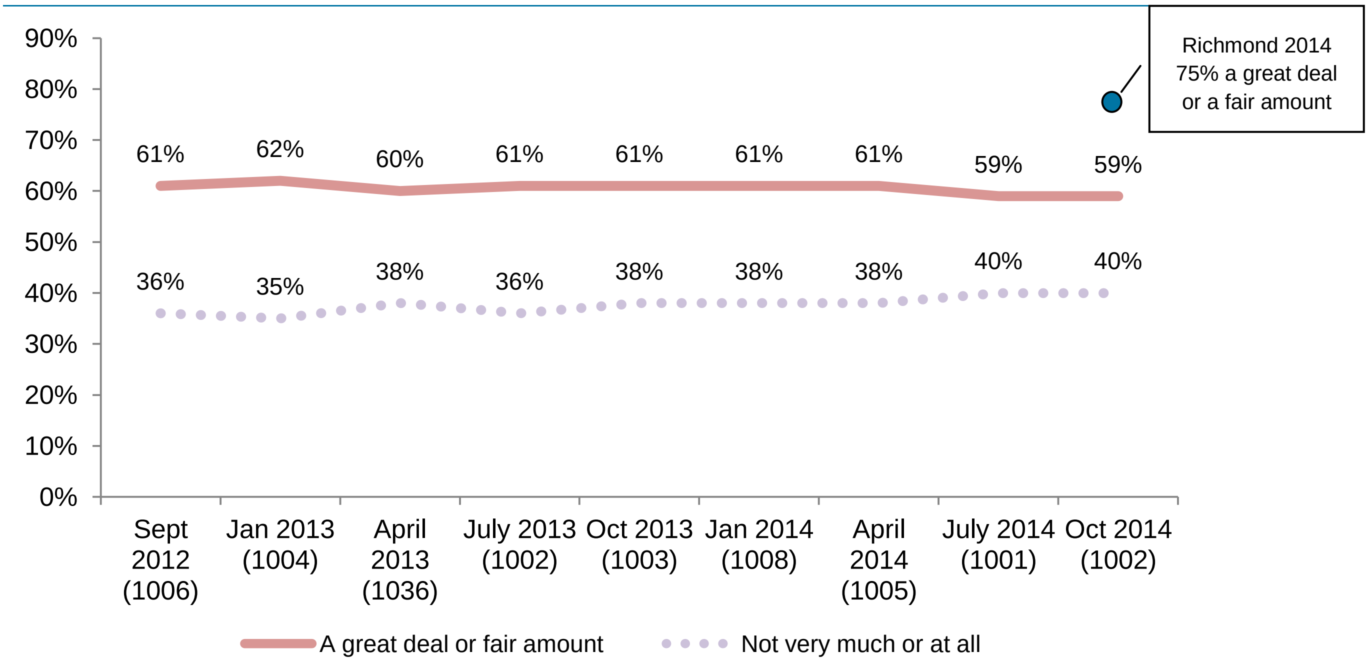
Figure 17: How much do you trust Richmond Council? (All responses)



Unweighted sample bases in parenthesis

Comparing these results to the national average as provided by the LGA shows that levels of trust among Richmond residents are above the norm. The current 75% of residents who trust the Council either a great deal or a fair amount is 16 percentage points above the October 2014 benchmark of 59%.

Figure 18: National trends in trusting local Councils – LGA Polling



Among those who believe that they are kept very or fairly well informed about the Council's services and benefits 83% trust the Council either a great deal or a fair amount. Among those who do not feel informed just 62% trust the Council, a significant variation. This finding suggests that Council communications are likely to play a role in enhancing and sustaining public trust, although it must be noted that service experiences and how they compare to individual expectations will also be key.

Looking at responses in more detail shows that the proportion of residents who state that they do not trust Richmond Council is highest in Twickenham at 33%. This was also the case a year ago with 27% in 2013 indicating that they did not trust the Council very much or at all. With this pattern consistent over two years further work may be needed to explore the root cause of this relatively high level of distrust within Twickenham village.

5 Service satisfaction and priorities

5.1 Satisfaction with local services

In order to further probe the current level of satisfaction with Richmond Council, all residents were invited to comment on a variety of Council services. For each service residents were asked to state how satisfied or dissatisfied they were with it either based on their general perceptions or based on their use of the service.

The first set of services residents were asked to consider were those that are visible to all, i.e. waste collection, street cleaning and highway and pavement maintenance. As shown by the table below more than eight in ten residents are satisfied with refuse collection (89%), recycling services (87%) and street cleaning (84%). Satisfaction with road and pavement maintenance, is recorded at 58% and 56% respectively. Compared to 2013 the satisfaction levels recorded for these universal services are unchanged with the exception of road maintenance for which satisfaction has risen by 3-percentage points. This rise coincides with a period when a Community Roads & Pavements Fund has been implemented. While direct causation between the two cannot be proved, it is possible that this initiative is being noticed by residents.

Table 5: How satisfied or dissatisfied, if at all, are you overall with the following services in your local area…? – universal services (All responses)

	% satisfied 2012	% satisfied 2013	% satisfied 2014	% point change 2013-14
	Universal services			
Refuse collection	84%	88%	89%	+1
Recycling services	81%	86%	87%	+1
Street cleaning	75%	83%	84%	+1
Road maintenance	47%	55%	58%	+3
Pavement maintenance	46%	55%	56%	+1
Unweighted sample base:	**1428**	**1405**	**1403**	

National polling by the LGA has collected data on a small selection of Council services. In October 2014:

- 75% of residents nationally expressed satisfaction with street cleaning in their local area (Richmond 84%);
- 42% were satisfied with road maintenance (Richmond 58%);
- 56% were satisfied with pavement maintenance (Richmond 56%);

Therefore the views of Richmond residents are more positive than the national average in relation to street cleanliness and roads and satisfaction equals the national benchmark for pavement maintenance.

In the table below satisfaction with the other services covered in this research are shown based on the views of those who have used these services. While comparisons with the user satisfaction recorded in 2012 and 2013 are shown, the percentage point changes should be viewed as indicative due to the likelihood of different user sample sizes in each data set. The 3-percentage point increase is satisfaction with parking services among users coincides with the implementation of the Council's Fair Parking Policy.

Table 6: Service satisfaction among service users (All users)

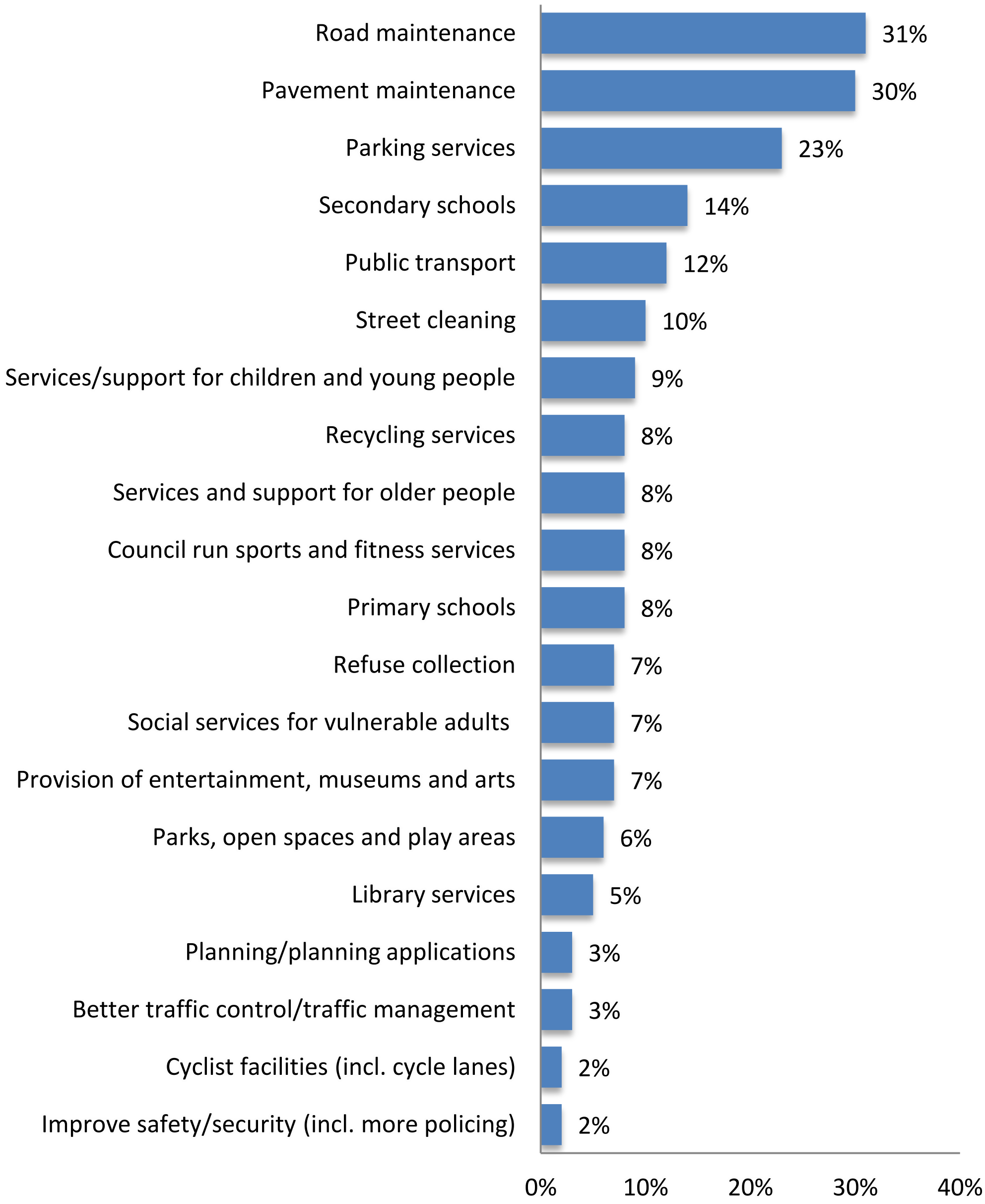
	% satisfied 2012	% satisfied 2013	% satisfied 2014	% point change 2013-14
Library services (891)	79%	87%	89%	+2
Social services for vulnerable adults and those with disabilities (144)	56%	54%	57%	+3
Services and support for children and young people (excluding schools) *(258)	65%	71%	67%	-4
Services and support for older people (160)	57%	61%	69%	+8
Council run sports and fitness services (488)	66%	73%	73%	0
Provision of entertainment, museums and arts (743)	71%	75%	79%	+4
Parks, open spaces and play areas (1261)	90%	93%	94%	+1
Primary schools (339)	84%	86%	88%	+2
Secondary schools (208)	67%	72%	71%	-1
Public transport (1304)	83%	88%	87%	-1
Parking services (1109)	40%	50%	53%	+3
2014 unweighted sample bases in parentheses ***note wording addition**				

5.2 Priorities for service improvements

Looking forward to the next 12 months all residents were asked to state which services if any they feel that it is most important for Richmond Council to improve. Respondents answered in their own words with interviewers allocating their responses to a pre-prepared list. As is illustrated in the following figure the top three priorities among residents are all related to highways and car use.

Firstly, 31% of residents state that road maintenance needs to be a priority, with a further 30% selecting pavement maintenance. Parking services is the third highest priority with 23% stating this should be a priority. Notably all three of these issues also made up the top three priorities in 2012 and 2013. Therefore these issues are consistently perceived by Richmond residents as requiring attention.

Figure 19: Thinking about your local area, which services, if any, are the most important for the Council to improve in the next 12 months? (All responses given by at least 2% of respondents)



Unweighted sample base: 1403 All responses given by 2% or more of residents

In order to focus action on key issues it should be noted that:

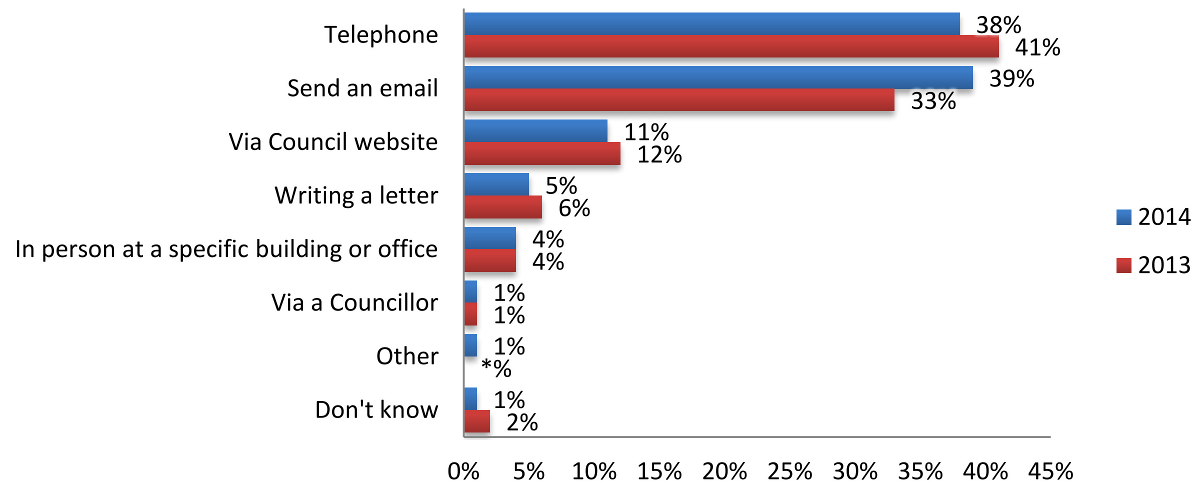
- Calls for road maintenance to be prioritised are most common in the villages Hampton (46%), Ham and Petersham (42%) and Whitton (37%).
- Pavement maintenance is most commonly prioritised in Hampton (34%) and Whitton (33%).
- Parking is most commonly chosen as a priority issue by residents of Kew (34%).

6 Communications and engagement

6.1 Customer contact

When considering how they would prefer to contact Richmond Council, the highest proportion of residents would prefer to use e-mail (39%) and the telephone (38%). This is the first time that the preference for online contact has matched that seen for the consistently popular telephone channel. A further 11% would prefer to make contact via the Council's website. Combining the preferences for e-mail and website contact shows half of residents (50%) now favour some means of electronic contact. This is important information for future channel shift strategies.

Figure 20: What is your preferred method of contacting the Council? (All responses)



Unweighted sample base: 2013: 1405 2014 : 1403 * denotes less than 0.5%

Further analysis by age shows that a preference for telephone remains strongest among those aged 55-64 (41%) and 65+ (52%). As might be anticipated contact by e-mail is more commonly selected as a preference by younger residents. All significant variations in contact preferences by age are shown in the table below.

Table 7: Contact preferences by age (All responses)

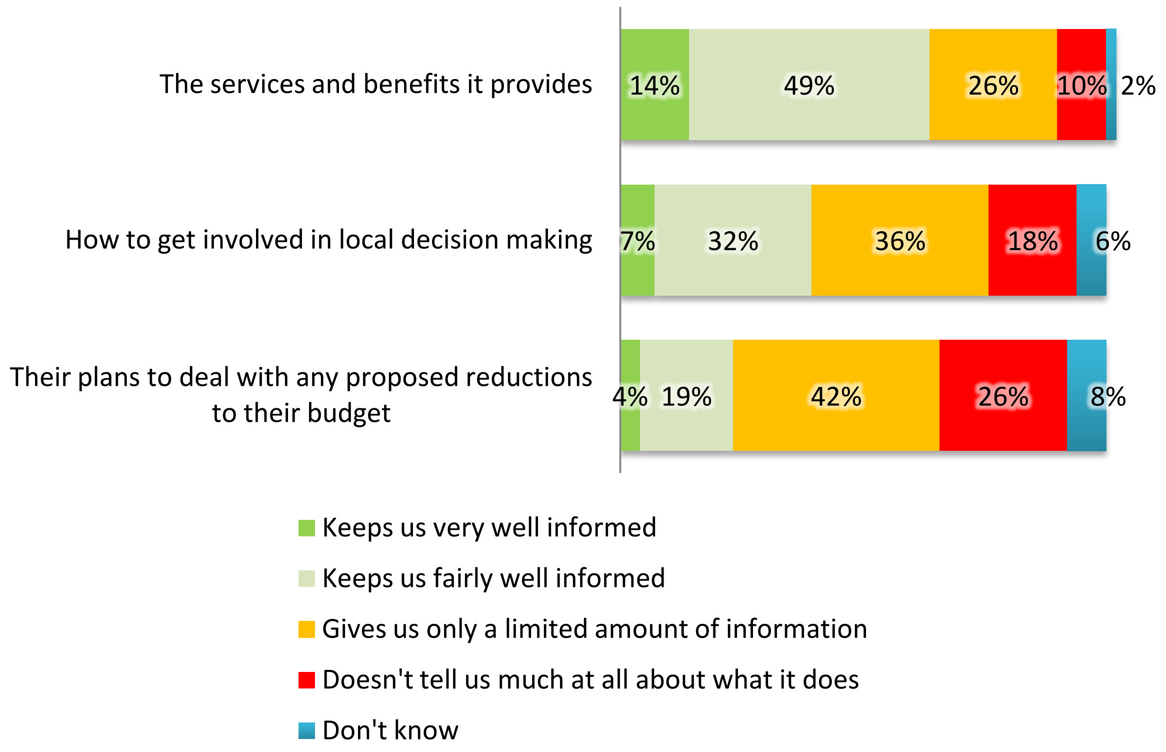
	16-34	35-54	55-64	65+
Writing a letter	8%	3%	4%	**9%**
By telephone	35%	33%	**41%**	**52%**
In person at a specific building or office	3%	3%	4%	7%
Via a Councillor	0%	*%	**1%**	**2%**
Via Council website	10%	13%	11%	6%
Sending an email	**41%**	**46%**	**38%**	21%
Tweeting	0%	*%	0%	0%
Other	2%	1%	1%	*%
Don't know	*%	*%	0%	1%
Unweighted Bases	**149**	**620**	**303**	**324**

6.2 Feeling informed

Analysis of the 2008 Place Survey national data set confirmed the long-held belief that well informed residents are more likely to be satisfied with their Council. More than six in ten residents (63%) currently feel informed about Richmond Council's services and benefits. However, 36% of residents feel that they only receive a limited amount of information from the Council or indeed that it doesn't tell them much at all about what it does.

The proportion of residents who feel informed about how to get involved in local decision making is 39%. It is a common finding for fewer residents to feel informed about this relative to Council services and benefits. The final aspect of this question asked residents how informed they feel about Council plans to deal with any proposed reductions to their budget. In response, just over one in five (23%) residents feel that they are kept informed about this issue.

Figure 21: Overall, how well informed do you think Richmond Council keeps residents about...? (All responses)



Unweighted sample base: 1405

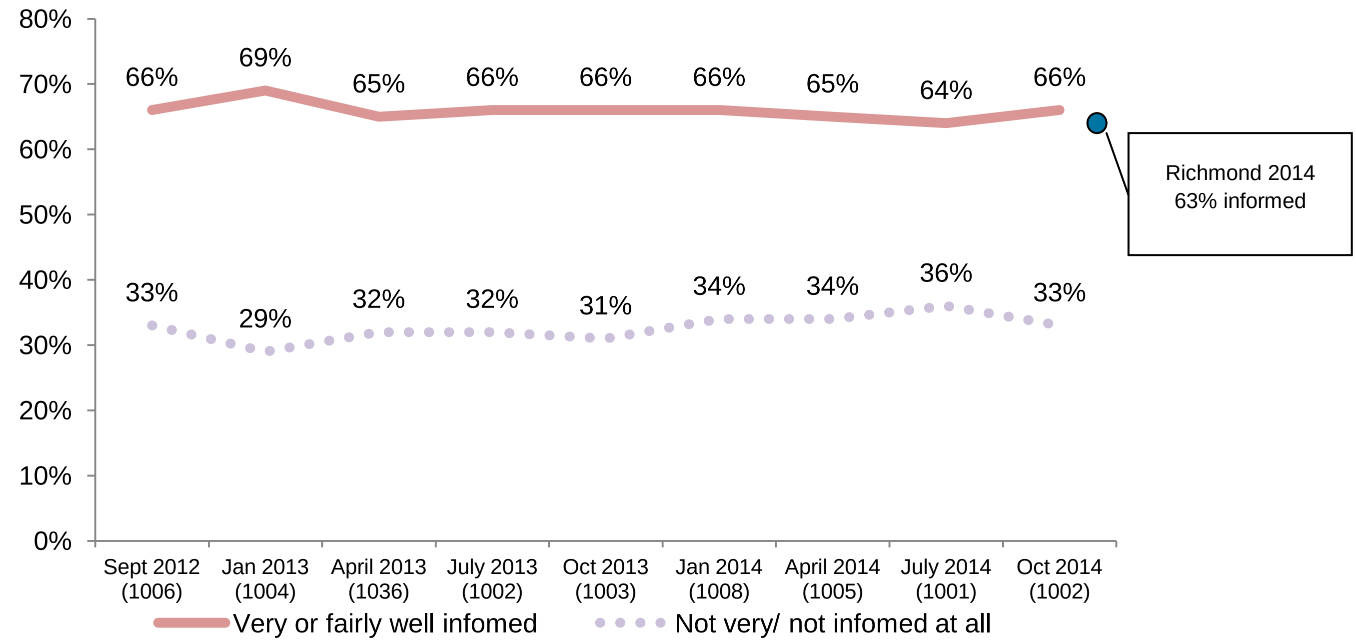
Comparing these results to those recorded previously shows that the rises in the proportion of informed residents between 2012 and 2013 have been sustained, with the 2014 findings in line with those seen a year ago.

Table 8: Extent to which residents feel informed about Richmond Council 2012-14 (All responses)

	% informed 2012	% informed 2013	% informed 2014	% point change 2013-14
… the services and benefits it provides?	57%	62%	63%	+1
… how to get involved in local decision making?	33%	39%	39%	0
… their plans to deal with any proposed reductions to their budget?	20%	22%	23%	+1
Unweighted sample base:	**1428**	**1405**	**1403**	

The proportion of residents who feel informed about Richmond Council's services and benefits can be benchmarked against figures from the most recent waves of LGA polling. In October 2014 nationally 66% of residents felt informed about their Council's services and benefits. The latest Richmond Council figure of 63% is therefore marginally below this benchmark.

Figure 22: National trends in being kept informed about Council service and benefits – LGA Polling



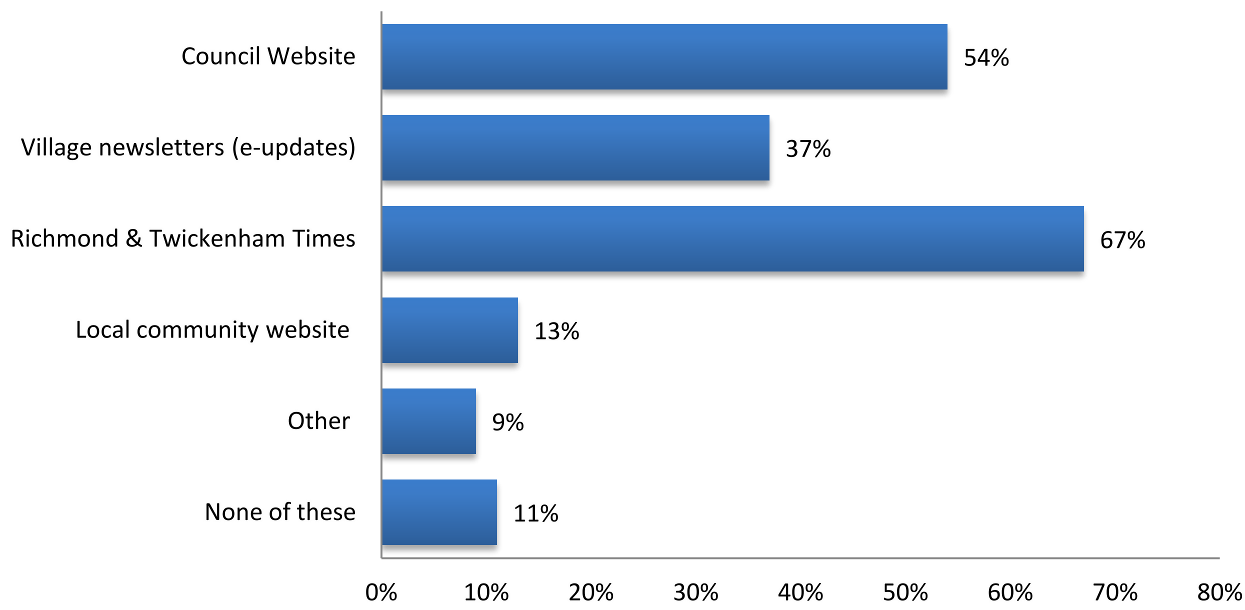
Unweighted bases in parenthesis

No benchmarking data is available for the proportion of residents who feel informed about the Council's plans to deal with reductions to its budget. However, the fact that only a minority of 23% feel informed about this issue (42% feel they have limited information about this and 26% say the Council doesn't tell them much at all about what it does in this respect) raises the question of the level of awareness and preparedness for future cuts or changes to services in the context of a challenging budget position. While the recent Autumn Statement has resulted in renewed national coverage about the scale of the budget savings required in the public sector, this finding does suggest that significant changes to service delivery will need to be accompanied by a strong communications narrative about why this is necessary.

6.3 Media and communications

In the context of shaping future Council communications, all residents were asked if they have seen any of four local information sources. In response, two thirds of residents (67%) indicate that they had seen the Richmond & Twickenham Times during the past 6 months. This suggests that the messages within this publication are likely to play an important part in shaping public opinion. In the same period 54% had seen the Richmond Council website (53% in 2013) and 37% had seen village newsletters (34% in 2013).

Figure 23: Which, if any, of the following produced by Richmond Council or available locally such as local newspapers have you seen in the last six months? (All responses)



Unweighted sample base: 1403

Among the other mentions at this question no source was mentioned by more than 1% of residents. These other mentions include the following information sources:

- The Informer;
- Official social media (i.e. Twitter);
- Richmond & Barnes Magazine;
- Rugby Post/Touchline Magazine;
- Council emails;
- Newsletters/letters/leaflets/flyers;
- Middlesex Chronicle;
- Political Party media;
- Richmond Resident/Green Resident;
- Neighbourhood Watch;
- TW11 Magazine; and,
- Noticeboards/billboards/posters.

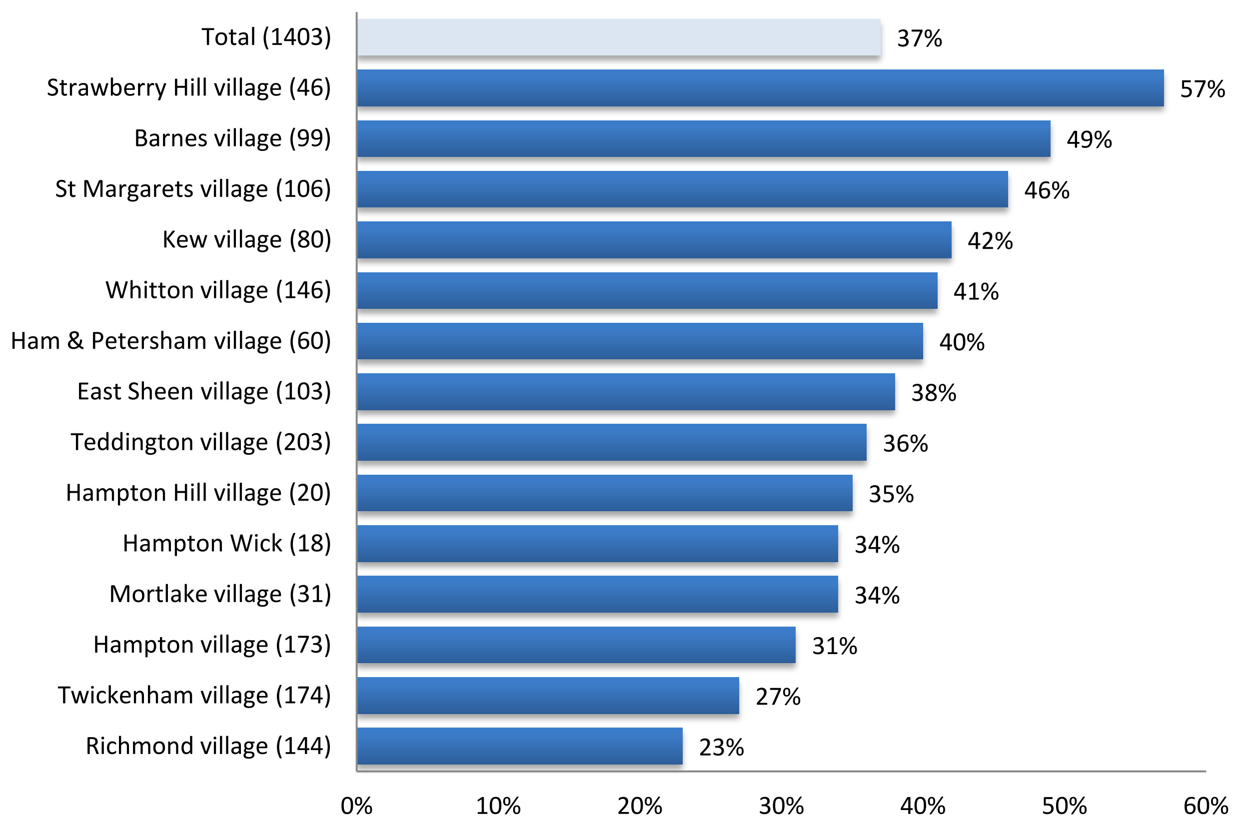
In order to understand the extent of which the featured information channels reach different segments of the population, exposure to each channel by age group is shown in the table below. The most notable finding from this table is that residents aged 65 and over are most likely to not have seen any of the listed information channels in the last 12 months (16%) and subsequently are the age group most likely to lack exposure to the key messages Richmond Council may provide via these channels.

Table 9: Information channels seen in the last six months by age (All responses)

	16-34	35-54	55-64	65+
Council Website	**43%**	**64%**	**60%**	32%
Village newsletters (e-updates)	35%	38%	**41%**	32%
Richmond & Twickenham Times	75%	62%	**70%**	67%
Local community website	6%	**16%**	**15%**	8%
Other	3%	**10%**	**11%**	**9%**
None of these	10%	10%	8%	**16%**
Don't know	0%	1%	0%	1%
Unweighted Bases	**149**	**620**	**303**	**324**

Geographically, recall of the village newsletters ranges from 57% in the Strawberry Hill village to 23% in Richmond village. This is a difference of 34 percentage points.

Figure 24: Recall of village newsletters by village (All responses)



Unweighted sample bases in parentheses

In assessing the value of each of the contact channels it should be noted that those who feel the Council keeps them either very or fairly well informed about its services and benefits are significantly more likely than those who say the opposite to have recently seen the Council website (59% compared to 46%), and a village newsletter (43% vs. 27%). However, the informed cohort are also more likely to have seen the Richmond & Twickenham Times compared to those who do not feel informed (72% compared to 60%) so the relative influence of Council channels and the local media are not easy to identify from this data. These variations are consistent with those observed in 2013.

6.4 Internet use

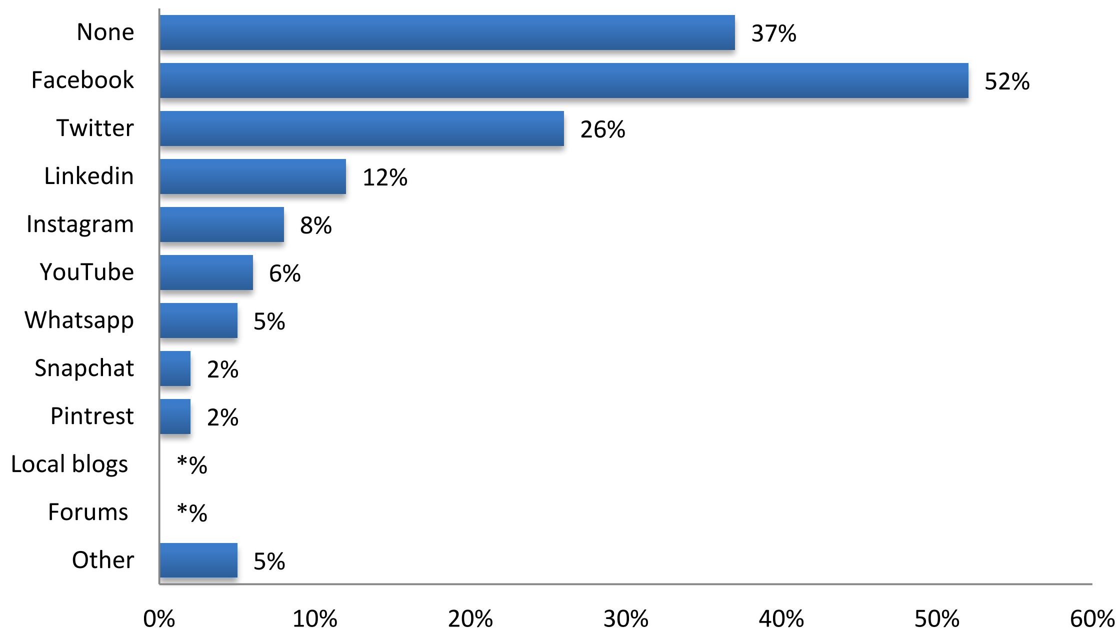
To provide an updated indication of the potential for Council services and communications to be migrated online, two questions about personal internet use were included in this section of questions. Firstly, residents were asked whether they use the internet. Internet penetration in the borough is extremely high with 91% of residents being internet users. This proportion is unchanged from the 91% seen in 2013. Among those aged 16-34 and 35-54 internet use is nearly universal with 99% and 97% stating that they are users. In comparison, almost two thirds (65%) of those aged 65 and over use the internet although this proportion has increased from 60% in 2013. On this basis it is clear that any 'digital by default' strategies for service access would run the risk of excluding the older residents of the borough.

Table 10: Internet users by age (All responses)

	Total	16 to 34	35 to 54	55 to 64	65+
Yes	91%	**99%**	**97%**	**93%**	65%
No	9%	1%	3%	7%	**35%**
Unweighted Bases	**1403**	**149**	**620**	**303**	**324**

Among internet users 63% use one or more form of social media. Among this group the highest use is seen for Facebook (52%), Twitter (26%) and Linkedin (12%) More than one response was possible at this question. At a local level fewer than 1% indicate that they use local blogs which questions the influence they have locally. However, it should be recognised that blog posts can easily be re-posted on other more popular forms of social media such as Facebook and Twitter.

Figure 25: What social media sites do you frequently use? (All internet users)



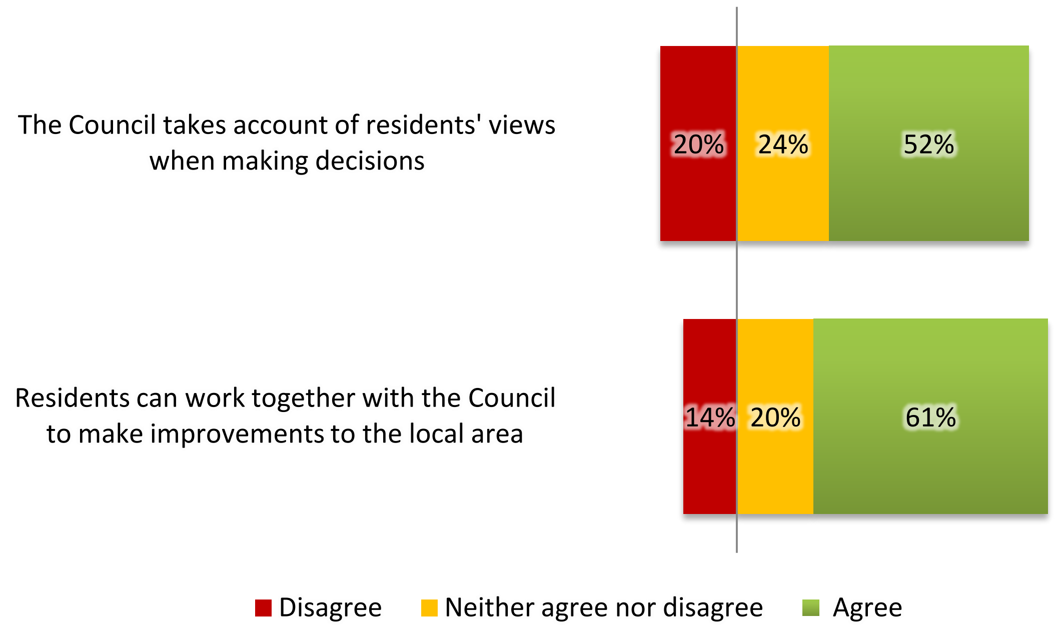
Unweighted base: 1243 * denotes less than 0.5%

Probing the data further shows that those aged 16-34 are significantly more likely to use national social media sites with the exception of the professionally orientated Linkedin. This is most commonly used by the 35-44 year old age group (14%).

6.5 Involvement and engagement

Richmond Council regularly engages and consults with its residents, with a calendar of its consultation activity published on its website. To determine whether residents recognise this activity all were asked how strongly they agree or disagree that their Council takes into account the views of residents when making decisions and whether residents feel they can work together with the Council make improvements to the local area. In response, just over half of residents (52%) feel that the Council takes account of residents' views when making decisions. Among the remainder, 24% neither agree nor disagree, 20% disagree and 4% don't know. Views on whether residents can work with the Council to affect change are even stronger with 61% agreeing and 14% disagreeing this is the case.

Figure 26: To what extent do you agree or disagree with the following statements about Richmond Council? (All responses)



Unweighted sample base: 1405

The proportion of residents who agree that the Council takes account of residents' views when making decisions at 52% is unchanged from the 51% seen a year ago. The statement on residents working with the Council was a new addition for 2014 on the basis that greater collaborative working between the Council and the public may be needed as new models of service delivery are deployed.

Table 11: Views on engagement and influence 2012-2014 (All responses)

	% agree 2012	% agree 2013	% agree 2014	% point change 2013-14
The Council takes account of residents' views when making decisions	40%	51%	52%	+1
Unweighted sample base:	**1428**	**1405**	**1403**	

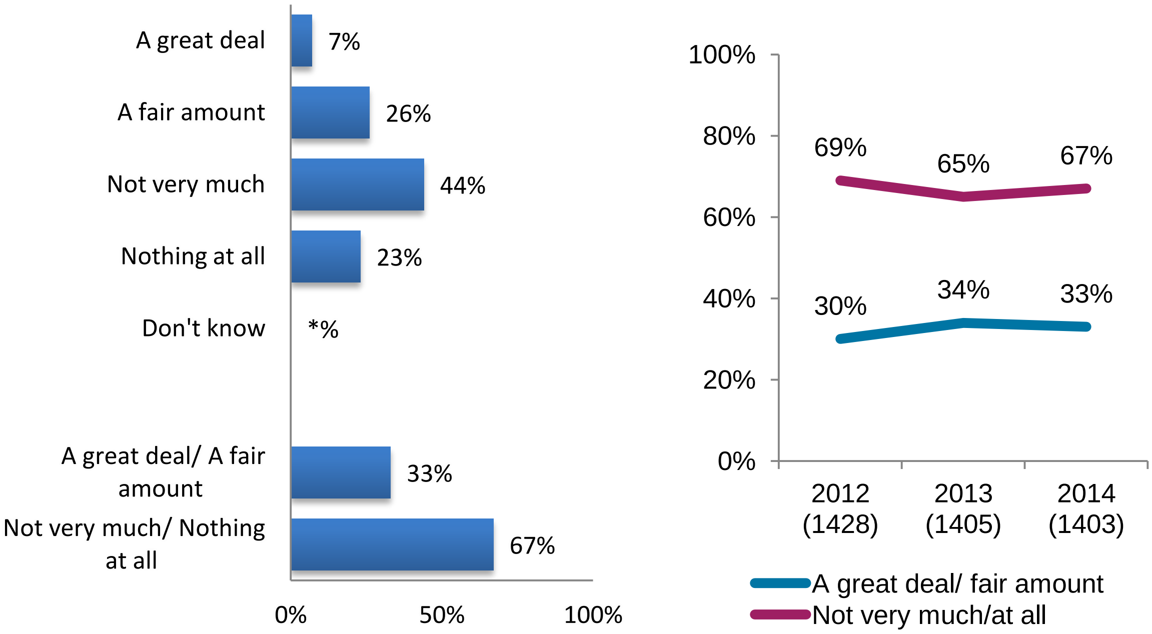
To understand these responses further it should be noted that the following resident groups most commonly disagree that residents can work together with the Council to make improvements to the local area:

- Residents of Twickenham village (19%);
- Those aged 35-54% (17%) and parents of children under 19 relative to non-parents (17% vs. 12%); and,
- Those who trust the Council not very much or at all (39%).

6.6 Volunteering

Currently, a third of Richmond residents (33%) give either 'a great deal' or 'a fair amount' of time doing something to help improve their community or neighbourhood. This proportion is unchanged from the 34% recorded in 2013.

Figure 27: How much time, if at all, do you personally spend doing something to help improve your community or neighbourhood? (All responses)



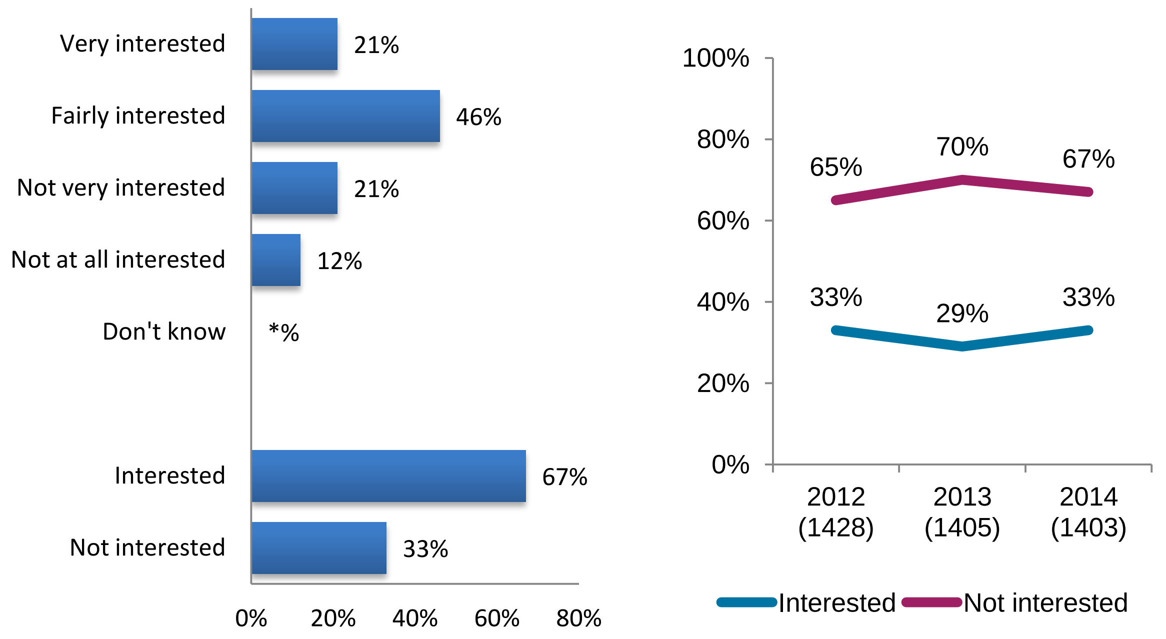
Unweighted sample base in parenthesis

* denotes less than 0.5%

The exact motivations for offering their time in this way and the nature of the help provided was beyond the scope of this survey. However, further analysis of the survey data does show that those who give their time currently are more commonly aged 35-54 (37% give either a great deal or a fair amount of their time to help improve their community or neighbourhood). This was also the case in 2013. This may be related to activities to do with schools and young people given that 40% of those with children under 19 spend some of their personal time to benefit the neighbourhood or community compared to 28% of non-parents.

Among all Richmond residents 67% express a level of interest in receiving more information to help them do more to help improve their community or neighbourhood. This suggests that there is potential to raise the level of voluntary activity in the borough yet further. This may be vital if alternative models of service delivery with greater resident involvement are needed going forward. However, it should be noted that the proportion of residents expressing interest in further information on this topic has dropped marginally by 3-percentage points since 2013.

Figure 28: And how interested, if at all, are you in receiving more information to help you do more to help improve your community or neighbourhood? (All responses)



Unweighted sample base in parenthesis * denotes less than 0.5%

Interest in such information is significantly higher among those aged 16-64 (70%) than among those aged 65+ (54%). More specifically the proportion interested in receiving further information about community involvement is highest among those aged 35-54 (70%) despite the fact that this age group is already the most common provider of time for community benefit. No variation is evident by gender. At the village level, interest in receiving more information about how to improve the community or local neighbourhood is significantly higher in Mortlake (86%), Strawberry Hill (79%) and Whitton (76%). Conversely, interest is lowest in the villages of Barnes (57%) and Kew (60%).

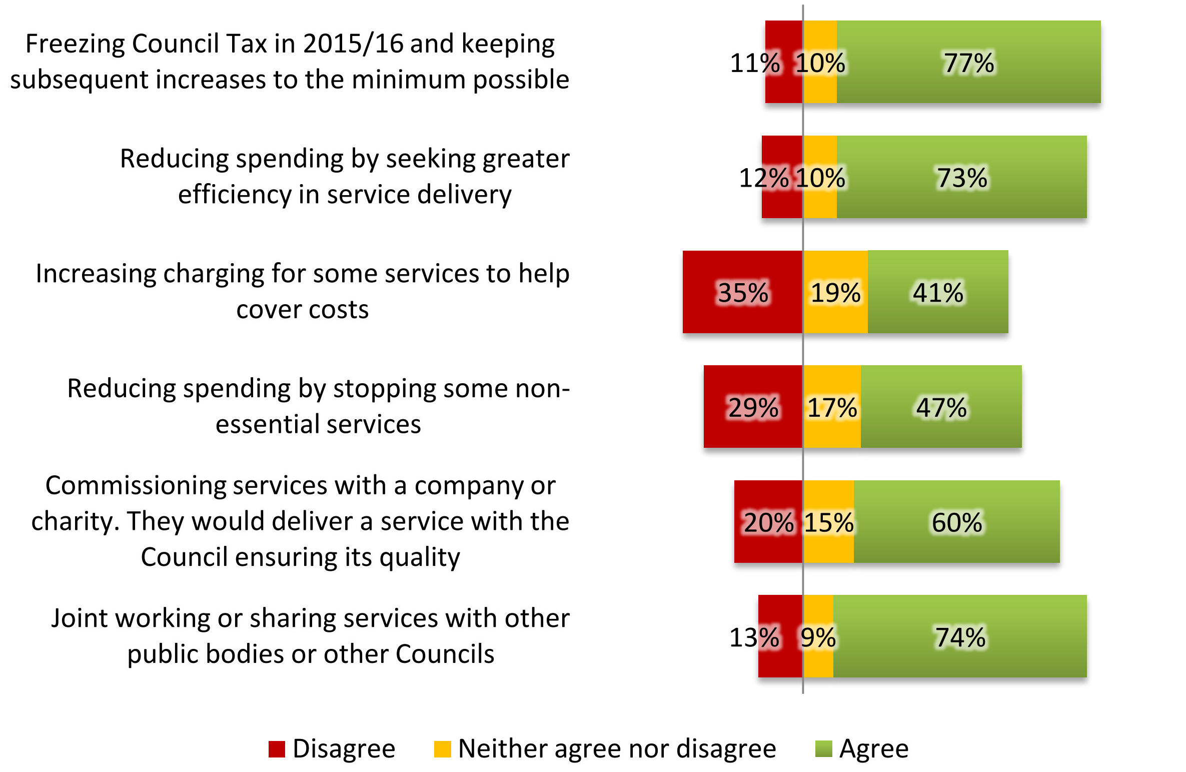
The details of those expressing interest in receiving more information on this topic will be provided to Richmond Council, where the respondent has given permission for BMG Research to share their contact details.

7 Budget issues

Like all local authorities, Richmond Council is faced with an increasingly challenging budget position, with the outcome of the 2015 general election unlikely to have any substantial impact on this. In this context a question was included in the survey to gather up to date information on what residents perceive to be the optimum approach for Richmond Council to take in difficult economic times.

The responses given by Richmond residents suggest that the approach of freezing Council Tax in 2015/16 and minimising increases thereafter is supported by 77% of residents. No information on the budgetary implications of this decision was provided to respondents. Only 11% of residents disagree with a Council Tax freeze. Alongside this effective freeze on Council income, 73% of residents feel that spending should be reduced by seeking greater efficiency in service delivery and 47% would support reduced spending on some non-essential services. Views on whether charges for some services should be increased are more polarised, with equal proportions agreeing with this approach (41%) and disagreeing (35%).

Figure 29: Do you agree or disagree with the following potential elements of the Council's approach to managing its budget during the current difficult economic times? (All responses)



Unweighted sample base: 1403

Two new approaches were included in this question in 2014 to explore public views on alternative models of service delivery. When asked about Richmond Council commissioning services with a company or charity with the Council retaining a role of overseeing quality, six in ten residents (60%) agree with such an approach. Even higher agreement is seen for Richmond Council undertaking joint working or sharing services with other public bodies or other Councils (74%).

The table below shows how the agreement recorded in 2014 compares to that seen a year ago. For three of the four budget approaches that featured in both the 2013 and 2014 surveys there has been no shift in public support. However, over this period there has been a 5-percentage point increase in agreement for increasing charges for some services to help cover costs (36% to 41%).

Table 12: Approach to Council budget 2013-2014 (All responses)

	% agree 2013	% agree 2014	% point change
Freezing Council Tax	75%	77%	+2
Reducing spending by seeking greater efficiency in service delivery	72%	73%	+1
Increasing charging for some services to help cover costs	36%	41%	+5
Reducing spending by stopping some non-essential services	48%	47%	-1
Unweighted sample base:	**1405**	**1403**	

Looking at responses in more detail shows that those aged 35-54 are least likely to agree with the approach of increasing charges at the point of service use (39%), with 37% stating their disagreement with this strategy. There is also high disagreement among those who rent from a housing association or registered social landlord (54%). Although this is perhaps an oversimplification, these are likely to be the least well off residents in the sample.

To understand the views expressed it is also interesting to examine residents' current views on the value for money Richmond Council provides. Views on this issue have no significant correlation on the proportion who agree that Council Tax should be frozen. However, those who agree that the Council currently provides good value for money are more likely to support increasing service charges, service reductions and the outsourcing of services than those who have a less positive view of the Council's value at present.

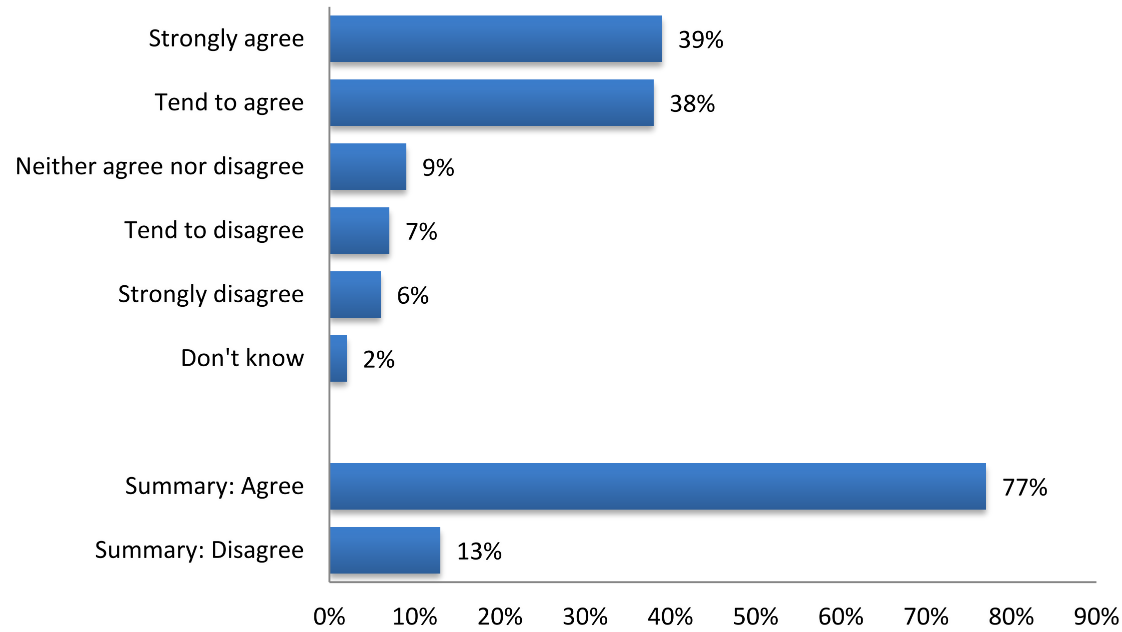
Table 13: Interaction of views on Council budget approach and current views on Council value for money (All responses)

	Richmond Council provides value for money		
% who agree with each approach to budget management	**Agree**	**Neither**	**Disagree**
Freezing Council Tax in 2015/16 and keeping subsequent increases to the minimum possible	78%	74%	75%
Reducing spending by seeking greater efficiency in service delivery	75%	70%	71%
Increasing charging for some services to help cover costs	**47%**	**38%**	24%
Reducing spending by stopping some non-essential services	**50%**	44%	42%
Commissioning services with a company or charity. They would deliver a service with the Council ensuring its quality	**66%**	53%	50%
Joint working or sharing services with other public bodies or other Councils	76%	72%	72%
Unweighted sample base	**873**	**331**	**178**

As already shown in Figure 29 above, almost three quarters (74%) of residents agree with the idea of Richmond Council joint working or sharing services with other public bodies. A second more specific question was included on this issue. Residents were told that the Council has set out plans to explore closer joint working with Kingston Council in order to find more efficient ways to deliver services. In response, 77% of residents agree with this approach including 39% who give the most positive response of strongly agree. Conversely, just 13% of residents oppose this approach.

On this basis there does appear to be public support for Richmond Council to explore new ways of delivering services to meet the challenge that budget reductions will continue to pose.

Figure 30: Views on plans to explore joint working with Kingston Council (All responses)



Unweighted base: 1403

Among those who agree the Council currently provides value for money 80% support the proposed joint working with Kingston Council. Although, it is notable that this proportion falls significantly to 71% among those who disagree value is currently provided, this still represents majority support.

8 Respondent profile

The table below shows the composition of the survey sample prior to the application of weights.

Demographic	Proportion (Unweighted %)	Sample base (Unweighted)
Gender		
Male	40%	567
Female	60%	836
Age		
16 – 24	4%	49
25 – 34	7%	100
35 – 44	25%	350
45 – 54	19%	270
55 – 59	10%	139
60 – 64	12%	164
65 – 74	11%	154
75 +	12%	170
Not provided	0.5%	7
Tenure		
Owned outright	43%	604
Buying on mortgage	33%	463
Rent from Housing Association/RSL	8%	109
Rent from private landlord	8%	114
Shared ownership	1%	8
Living with parent	3%	45
Other	2%	22
Don't know	<0.5%	4
Not provided	2%	34
Parent of child under 19		
Yes – 0-3 years old	6%	88
Yes – 4-7 years old	13%	176
Yes – 8-11 years old	12%	173
Yes – 12-14 years old	9%	127
Yes – 15-18 years old	11%	153
No	64%	896
Prefer not to say	1%	15

Time in borough		
Less than 3 months	<0.5%	1
3-12 months	1%	11
1 to 2 years	2%	28
3 to 5 years	5%	64
6 to 10 years	15%	202
11 to 15 years	14%	196
16 to 20 years	10%	139
More than 20 years	46%	638
Always lived here	8%	111
Prefer not to say	1%	13
Ethnicity		
White – British	77%	1078
White Irish	2%	32
White other	9%	124
Black or Black British Caribbean	<0.5%	3
Black or Black British African	<0.5%	8
Black other	<0.5%	2
Mixed – white and black Caribbean	<0.5%	3
Mixed- white and Asian	1%	17
Mixed - other	1%	9
Asian – Indian	3%	36
Asian –Pakistani	<0.5%	1
Asian – Bangladeshi	<0.5%	4
Asian- Chinese	<0.5%	5
Asian -other	1%	14
Arab	<0.5%	3
Other ethnic group	1%	20
Prefer not to say/don't know	3%	44
Long standing illness, disability or infirmity		
Yes - respondent	8%	106
Yes –other household member	6%	81
No	86%	1206
Not provided	1%	16

Appendix: Statement of Terms

Compliance with International Standards

BMG complies with the International Standard for Quality Management Systems requirements (ISO 9001:2008) and the International Standard for Market, opinion and social research service requirements (ISO 20252:2012) and The International Standard for Information Security Management ISO 27001:2005.

Interpretation and publication of results

The interpretation of the results as reported in this document pertain to the research problem and are supported by the empirical findings of this research project and, where applicable, by other data. These interpretations and recommendations are based on empirical findings and are distinguishable from personal views and opinions.

BMG will not publish any part of these results without the written and informed consent of the client.

Ethical practice

BMG promotes ethical practice in research: We conduct our work responsibly and in light of the legal and moral codes of society.

We have a responsibility to maintain high scientific standards in the methods employed in the collection and dissemination of data, in the impartial assessment and dissemination of findings and in the maintenance of standards commensurate with professional integrity.

We recognise we have a duty of care to all those undertaking and participating in research and strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects' participation should be as fully informed as possible and no group should be disadvantaged by routinely being excluded from consideration. All adequate steps shall be taken by both agency and client to ensure that the identity of each respondent participating in the research is protected.

With more than 25 years' experience, BMG Research has established a strong reputation for delivering high quality research and consultancy.

BMG serves both the public and the private sector, providing market and customer insight which is vital in the development of plans, the support of campaigns and the evaluation of performance.

Innovation and development is very much at the heart of our business, and considerable attention is paid to the utilisation of the most up to date technologies and information systems to ensure that market and customer intelligence is widely shared.