Ipsos MORI
Social Research Institute

Residents, Employees and Visitors in the South Bank neighbourhood

Autumn – Winter 2008/09

Final report

Research report on behalf of the South Bank Partnership

8 May 2009

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Introduction

This report presents the findings of research conducted on behalf of the South Bank Partnership in late 2008 to early 2009 among residents, employees and visitors in the South Bank Partnership neighbourhood. The neighbourhood is bounded by the River Thames, Lambeth Road, south to St George's Circus and follows the railway line to the east of Blackfriars Road. This section offers an overview of the key findings of the surveys.

Satisfaction with the South Bank as an area in which to live, work and visit

- Satisfaction with the South Bank is high among residents, employees and visitors.
- The proportion of residents who consider the South Bank a nice place to live has increased since 1999 to 92% very or fairly satisfied. This is especially impressive given that a high proportion in 1999 (84%) already expressed a positive opinion.
- Nearly two in five residents feel the area has improved over the past five years. Conversely, more than one in ten feel that the area has got worse over the past five years; and the proportion who feel it has improved in the past five years is lower among longer term residents.
- Residents and employees are both happy with the South Bank environment and its cleanliness; however, there are still issues with public toilet provision; parking; and people sleeping rough. Just over a quarter of residents are also unhappy at the level of noise.
- Residents exhibit high levels of satisfaction with local services, and three out of ten residents have seen an improvement in local services over the past five years.
- The highest level of dissatisfaction with local facilities among residents were with swimming facilities (or the lack of them). This is the only matter on which net dissatisfaction has increased since 1999. There was also a significant level of dissatisfaction among residents with indoor and outdoor sports facilities.
- Satisfaction with health and education services is fairly high across all groups, although NHS dentistry and services for young people could both be improved.

- Employees are generally very happy to be working on the South Bank. Half are very satisfied, and two fifths feel that the area has improved over the past five years. Only a small minority think it has got worse.

- Satisfaction with restaurants, cafés and bars is high, although less than one third of visitors use these facilities. There is a marked difference in the preferred destinations of residents, employees and visitors, with residents and employees tending to go to Lower Marsh and The Cut for refreshments, where very few visitors go to.

- A high proportion of visitors would recommend the area to others, and many return for repeat visits.

- Attractions such as the London Eye and Southbank Centre are a big draw. A sizeable proportion of visitors come to the area to see a specific attraction, while the majority of residents and employees also make use of these attractions.

Priority areas for improvement

- Residents and employees share many similar views on what needs to be improved in the area. Both groups are particularly keen to see swimming facilities improved.

- A lack of public toilets is a major issue. Both residents and employees complain about this, as well as spontaneous complaints by some visitors. A more appropriate provision of public toilets would improve the general environment for all using the South Bank.

- The low satisfaction for sports provision and especially swimming facilities among residents and employees is a cause for concern.

- Residents are satisfied with most aspects of NHS healthcare in the area, with one exception: NHS dentistry. For this, the proportion satisfied is almost identical to that dissatisfied.

- The high incidence of returning visitors demonstrates the strong appeal of the South Bank area to visitors. Worth consideration are the isolated complaints about litter and a lack of bins around the crowded London Eye and London Aquarium areas; and a few requests for greater communication about upcoming events.

- It is also apparent that shopping facilities are not widely used by visitors or employees. Residents also expressed lower levels of satisfaction with shopping facilities than other services. Clearly visitors are pulled by attractions other than shopping or refreshments. It was beyond the remit of the current research to explore the shopping needs of each of the three groups surveyed. It is therefore recommended that the needs of user groups are assessed in greater detail before making firm decisions on the appropriateness of current shopping facilities.

Introduction

Introduction

Background and objectives

In autumn 2008 Ipsos MORI was commissioned to undertake research on behalf of the South Bank Partnership exploring the perceptions of residents, employees and visitors of the South Bank area. The research objectives were to examine:

- Overall satisfaction with the South Bank as a place to live and work; and perceptions of change over the past five years;
- Levels of satisfaction with public services and facilities in the South Bank;
- Overall levels of satisfaction with the South Bank as a place to visit, and satisfaction with specific attributes such as cleanliness, personal safety, range of activities etc;
- Dining and shopping options in the South Bank area;
- Reasons for visiting the South Bank and the prime drivers of visit;
- Positive and negative perceptions of the South Bank area, and to identify any areas for improvement.

Two different approaches were taken to the fieldwork, using techniques tailored to the three different strands of the research:

- The residents survey was carried out using Computer Assisted Personal Interviewing (CAPI) and took place in respondents' homes. The sample was randomly pre-selected in order to avoid bias and to offer a representative picture of the South Bank area.
- The interviews for the employees and visitors surveys were carried out in-street, face-to-face with randomly selected members of the public (using 'one-in-n' line of sight to select respondents). Interviews were completed using pen and paper.

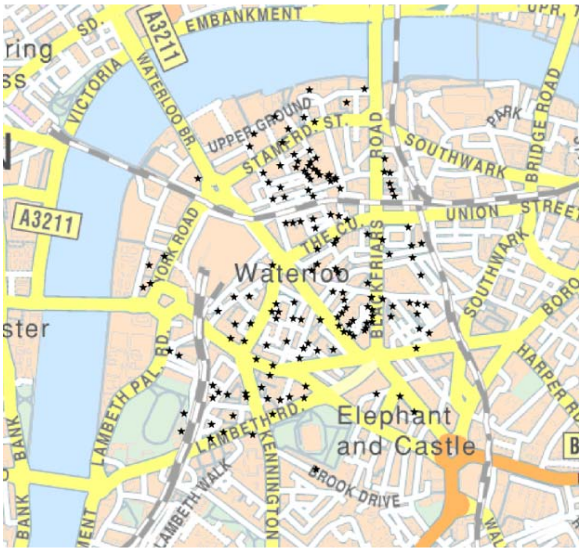
Detailed specifications of each of the fieldwork strands are provided overleaf.

Residents survey

The residents survey took place between 5 November 2008 and 25 February 2009. A total of 472 face-to-face interviews were conducted with people who live in Bishop's Ward (302) and Cathedrals Ward (170) within the South Bank Partnership area. Data have been weighted to the profile of the area according to gender, age, ethnicity, social grade and work status, based on the latest Office for National Statistics mid-year population estimates. The overall area is marked in red on the map below. The second map shows the positions of interviews included in the final sample by exact postcode (note that in some cases there was more than one interview per postcode).

Sample area

Final sample



In order to avoid bias in the sample, addresses within the South Bank Partnership area were randomly pre-selected using the Postal Address File (PAF). Advance letters were sent to all selected addresses informing residents of the research. The letter included a helpline number whereby residents could speak to an Ipsos MORI executive if they required further information.

Interviewers were *only* allowed to gain an interview at the defined addresses. Interviewers were obliged to make a minimum of six calls to each address over a minimum three week period before the sample was re-issued to an alternative interviewer.

Once contact had been made, in multi-person households, interviewers randomly selected an adult within the household to take part in the interview using a Kish Selection Grid. The residents survey was designed to give every adult in the sample area an equal chance of taking part in the research. In instances where there is more than one house/flat/bed-sit at an address, interviewers use a Kish grid to randomly select one of the households to take part in the survey. A unique grid is provided for each address and consists of a table of randomly generated numbers. The interviewer makes a note of all the houses/flats/bed-sits in the table and reads off the number in the box below the final entry. This number indicates which of the house/flat/bed-sit the interviewer should try and achieve an interview at. As a further measure to reduce bias, interviewers were only able to interview the randomly-selected interviewee and were *not* able to accept a substitution. Respondents were interviewed in their homes, using Computer Assisted Personal Interviewing (CAPI).

It should be noted that the volume of private gated properties in the area caused access issues during the fieldwork period. Additionally, in some properties, residents were only living in the property part-time, which added to difficulties in reaching them. A number of measures were taken in response to this issue:

- Reminder letters were sent to the pre-selected addresses. Where interviewers gained access to interview at pre-selected addresses, they also letter-dropped explanatory letters to neighbours informing them about the research;
- Explanation letters were sent to the management companies of these blocks, along with letters to be supplied to security guards and wardens reassuring them of the authenticity of the research;
- Ipsos MORI executives spoke to management companies/residents’ associations in order to explain the objectives of the research and identify appropriate times for interviewers to call (one residents’ association additionally posted information about the survey on their website).

With their support, access was improved to the blocks, although this area is a challenging environment in which to conduct in-home quantitative research. The response rate for this survey was therefore low at 26% (a full response analysis is included in the appendices).

Residents survey 1999

In 1999 Ipsos MORI conducted a survey on behalf of Coin Street Community Builders and South Bank Employers’ Group exploring general attitudes to the area and to evaluate the training, employment and social requirements of residents and businesses. 825 interviews were conducted face-to-face in-home among residents aged 16+. It should be noted that a quota methodology was followed (rather than a random sample as for the 2008-09 survey), and that the area researched was different (extending to Borough Road). Data have been compared where comparable questions have been asked, however, it should be noted that this is for indicative purposes due to the slightly differing approaches.

Employees survey

Interviewing for the employees survey took place between 30 October and 20 November 2008. A total of 205 face-to-face interviews were conducted with members of the general public at a number of different sample points (detailed below). A screener question was used to ensure that only people working in the South Bank area were included in the sample.

1 - Near the London Eye
2 - Outside the Royal Festival Hall
3 - Near the National Theatre/BFI Southbank
4 - Coin Street
5 - Top end of Westminster Bridge Road
6 - The Cut
7 - The Waterloo Road exit of Waterloo Station
8 - Lambeth North tube station
9 - Baylis Road end of Lower Marsh

Interview shifts were scheduled throughout the day during weekdays and weekends to ensure that a wide range of workers were represented.

Visitors survey

Fieldwork for the visitors survey took place between 8 September and 7 November 2008. A total of 322 face-to-face interviews were conducted with visitors (aged 16+) to the South Bank. Again, a screener question was used to ensure that only people who were visiting the area (as opposed to those who live or work in the area; or those who were passing through en route to another destination) were included in the sample.

To ensure a good spread of opinion and a healthy response rate, interviews took place across six separate sample points, which were selected in consultation with the South Bank Partnership. The location of these sample points is shown in the map opposite. The red line indicates the area used to define the South Bank for the purposes of the research. Again, this area was agreed with the South Bank Partnership. During the interview, respondents were provided with a map of the region, where relevant, as an aid to recall.

1 - Near the London Eye

2 - Outside the Royal Festival Hall

3 - Near the National Theatre/BFI Southbank

4 - Coin Street

5 - Top end of Westminster Bridge Road

6 - The Cut

In order to reach as broad an audience as possible, interview shifts were scheduled throughout the day on weekdays and weekends. Interviewing was suspended during special events (such as the Mayor's Thames Festival) to avoid introducing any potential bias to the data collected.

Presentation and interpretation of the data

It should be remembered that a sample, not the entire population of the area, has been interviewed. In consequence, all results are subject to sampling tolerances, which means that not all differences are statistically significant. A guide to statistical reliability is appended. The majority of charts and tables are ranked according to net scores (please see below for an explanation of net scores).

In the graphs and tables, the figures quoted are percentages. The size of the sample base, from which the percentage is derived, is indicated. Note that the base may vary as the percentage is not always based on the total sample. Caution is needed when comparing responses between small sample sizes (fewer than 100 respondents).

Where an asterisk (*) appears, it indicates a percentage of less than half of one per cent, but greater than zero. Where percentages do not add up to 100% this can be due to a variety of factors – such as the exclusion of 'Don't know' or 'Other' responses, multiple responses or computer rounding.

In this report, reference is made to 'net' figures. This represents the balance of opinion on attitudinal questions, and provides a particularly useful means of comparing the results for number variables. In the case of a 'net satisfaction' figure, this represents the percentage satisfied on a particular issue or service, less the percentage dissatisfied. For example, if a service records 50% satisfied and 30% dissatisfied, the 'net satisfaction' figure is +20 points.

Data tables comprising all results and their breakdown across various groups in the population are available separately on request.

Publication of data

Our standard Terms and Conditions apply to this, as to all studies we carry out. Compliance with the MRS Code of Conduct and our clearing is necessary for any copy or data for publication, web-siting or press releases which contain any data derived from Ipsos MORI research. Such approval will only be refused on the grounds of inaccuracy or misinterpretation of the findings. This is to protect your reputation and integrity as much as our own. We recognise that it is in no-one's best interests to have findings published which could be misinterpreted, or could appear to be inaccurately, or misleadingly, presented.

Acknowledgements

Ipsos MORI would like to thank Jonty Alone and Elizabeth Parbutt for their help and assistance throughout the project. We would also like to thank the representatives from management companies and residents' associations who assisted us in publicising the research to their residents; and all the residents, employees and visitors who took part in the research.

Overall satisfaction

Overall satisfaction

Satisfaction with the South Bank is high. The majority of residents like living there; employees consider it a nice place to work; and visitors feel there is plenty to do.

The proportion of residents who feel positively about the area as a place to live has increased from 84% very or fairly satisfied in 1999, to 92% very or fairly satisfied in this year's survey.

In general, residents and employees tend to feel the area has either improved, or stayed the same as a place to live/work over the past few years. That said, longer term residents were more split between feeling the area has improved, stayed the same, and *got worse* as a place to live in the past five years.

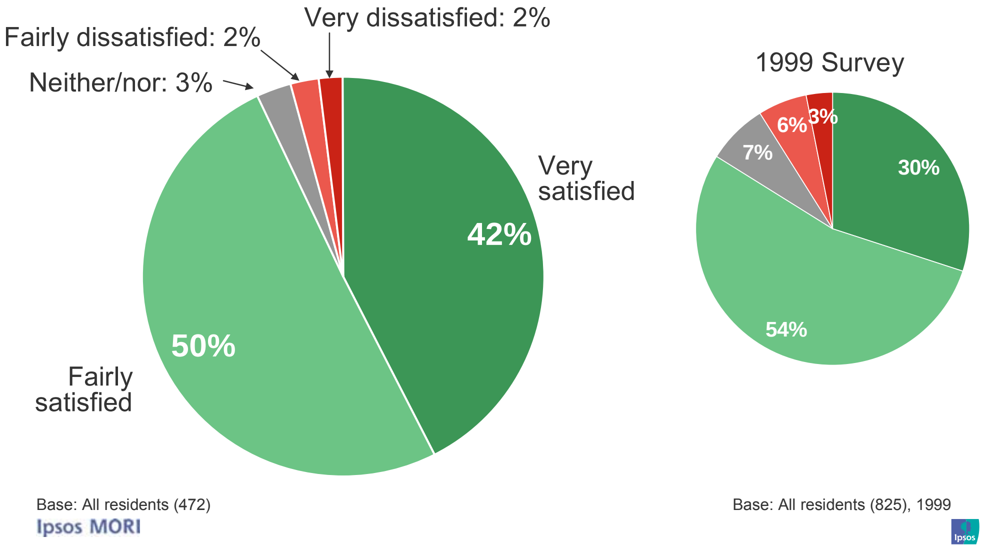
Residents

Pleasingly, residents are very positive about the South Bank as a place to live and the figures have improved since 1999. More than nine in ten are satisfied, including 42% who are 'very satisfied'. This compares with an overall satisfaction of 84% in 1999 (30% were very satisfied).

Those aged 55+ are more likely to be 'very satisfied' (56%), as are women (48%), and those living in Bishop's Ward (50%). Strong satisfaction is also linked to improving local services; 51% of those who feel these are getting better are 'very satisfied'.

Satisfaction with the South Bank as a place to live

How satisfied or dissatisfied are you with this area as a place to live?



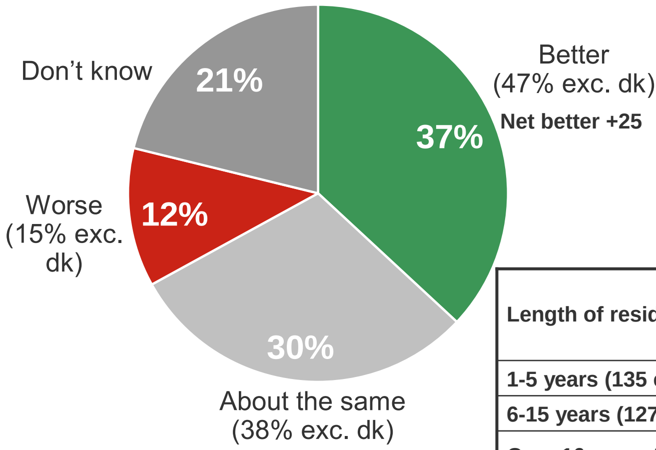
Two in five residents feel that the area has improved over the last five years (37%), although a higher proportion than in 1999 feel that it has got worse (12%). Again, a high proportion say that they don't know (21%), which is related to two fifths of residents (39%) having lived in the area for less than five years. Excluding those who don't know, just below half feel that the area has improved (47%), which compares to 15% who feel it has got worse, and 38% who say it's about the same.

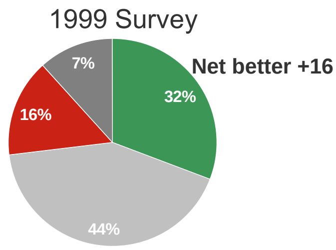
Those who have lived in the area for 6 to 15 years are more inclined to say the area has improved (54%), while those who have lived there for more than 16 years are more likely to say it has got worse (30%). It may be noted that during the time of the survey there was a great deal of road works in progress.

Those aged between 35 and 54 are also more likely to identify improvement (47%), along with residents on a higher income of over £50,000 per year (51%) and those who live in Bishop's Ward (42% vs. 33% living in Cathedrals Ward). Those who feel the area has improved are also of the opinion that services have got better over the past five years; three quarters who feel services have improved in the last five years also feel the area has improved as a place to live overall, indicating a link between service provision and perceptions of the area as a whole.

Residents: change over the last five years

*Would you say this area as a place to live has got better, worse or remained the same during the **last five years**?*





All residents (825), 1999

Length of residence:	Worse %	About the same %	Better %
1-5 years (135 exc. dk)	4	44	52
6-15 years (127)	17	28	54
Over 16 years (103)	30	39	31

Base: All residents (472), 2008/9

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Employees

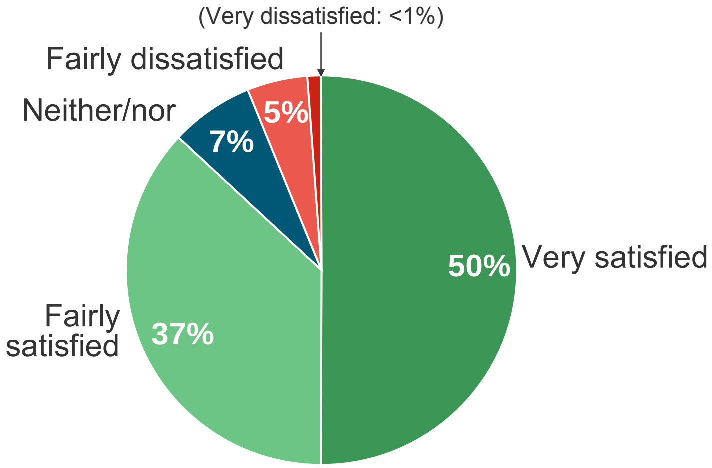
Overall satisfaction with the South Bank as a place to work is high. Half of all employees say that they are very satisfied (50%). Just one in twenty is dissatisfied (5%).

General satisfaction is higher among those in full-time employment (89%, compared to 76% of those in part-time employment).

Residents of Lambeth and Southwark working in the area are more likely than average to be *very* satisfied (60%, compared to 46% of those who live elsewhere).

Satisfaction with the South Bank as a place to work

How satisfied or dissatisfied are you with this area as a place to work?



Base: All employees (205), Autumn 2008
Ipsos MORI

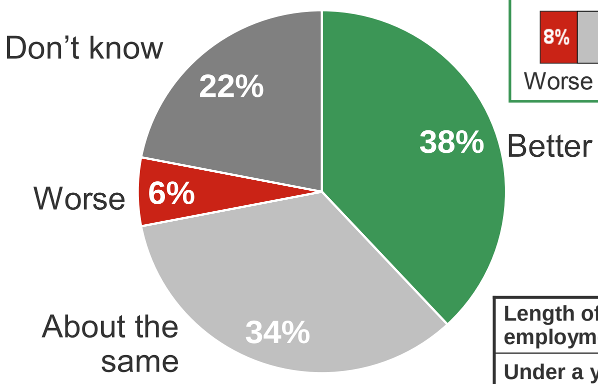
As with residents, nearly two in five employees feel that the area has improved over the last five years (38%), while only one in twenty feels that it has got worse (6%). A relatively high proportion say that they don't know (22%), but this is understandable given the fact that seven in ten have worked in the area for less than five years (72%). If we exclude those who don't know, half feel that the area has improved (49%), one in ten feel that it has got worse (8%), and two in five say that it hasn't changed (44%).

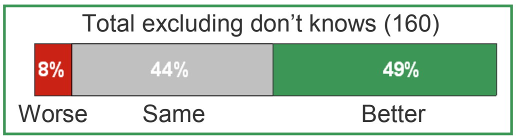
Among those who have worked in the area for at least a year, nearly half (48%) feel the area has got better; and among those who have worked in the area for at least five years, three in five feel the area has got better (59%).

A larger proportion of those aged 16 to 34 have worked in the area for a shorter period of time and are more likely to say they don't know how the area has changed over the past five years. However, among those expressing an opinion, 60% of those aged 35 to 59 feel the area has got better, compared to 38% of 16 to 34 year olds.

Employees: change over the last five years

*Would you say this area as a place to work has got better, worse or remained the same during the **last five years**?*





(Excluding don't knows %)

Length of employment:	Worse	About the same	Better
Under a year (38)*	3	55	42
1-5 years (67)*	6	51	43
6-10 years (55)*	13	27	60

Base: All employees (205), Autumn 2008
Base sizes shown in brackets * note low base
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Visitors

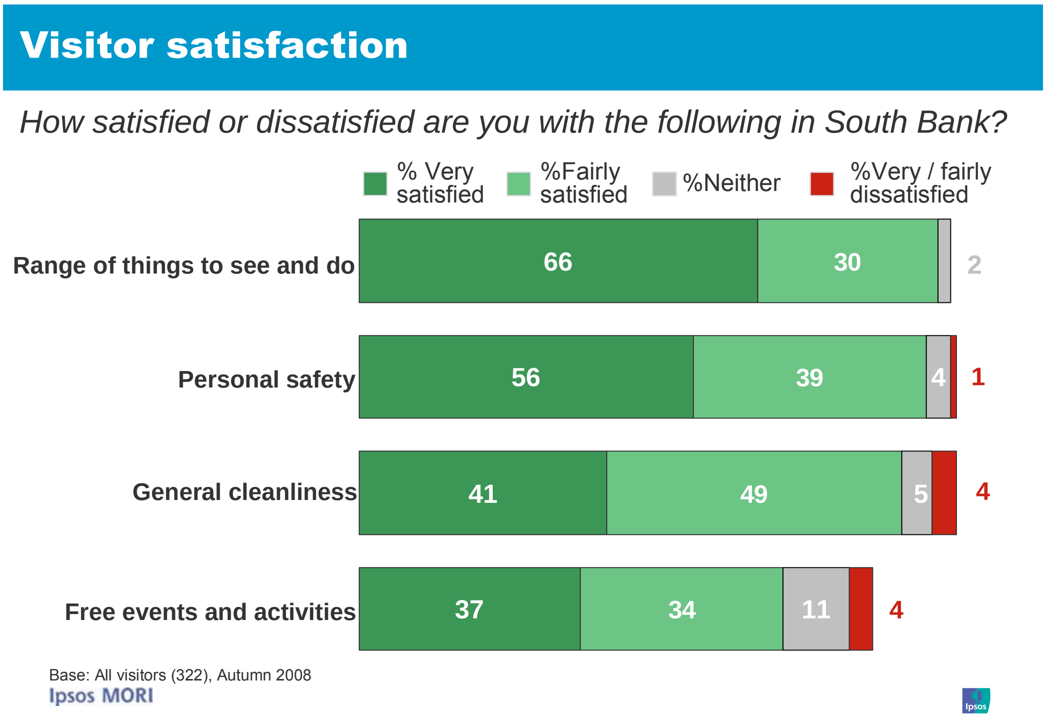
One of the South Bank's biggest strengths is the range of things to see and do. Almost all visitors are satisfied on this aspect (96%), and none are dissatisfied. The variety of attractions and events may account for the fact that shopping and dining do not appear as key motivations for visiting the area; there are clearly so many other things on offer that few people come to the South Bank solely to eat or shop. The area also scores highly in terms of personal safety and general cleanliness. There are slightly lower levels of satisfaction for the free events and activities on offer, although seven in ten visitors are still satisfied in this respect (71%). Again, very few visitors are actively dissatisfied.

Free events and activities scored particularly highly among people interviewed around Coin Street (84% satisfied, compared to 57% around the London Eye).

Visitors over the age of 60 are impressed with the free events and activities on offer – almost half (46%) are very satisfied (compared to 37% overall).

Some visitors spontaneously mentioned that cleanliness and rubbish facilities could be improved. There were complaints that litter bins were either not available (specifically those interviewed outside the London Aquarium) or overflowing. However, these were the views of a minority, and 90% of visitors were either very or fairly satisfied with the general cleanliness of the area.

Similarly, in spite of high levels of satisfaction with the range of things to do and free events and activities, there were calls for more information to be provided about what's on. Suggestions included an information point listing activities for that day, advance notice on websites and free newspapers, and prominent billboards showing a calendar of events.



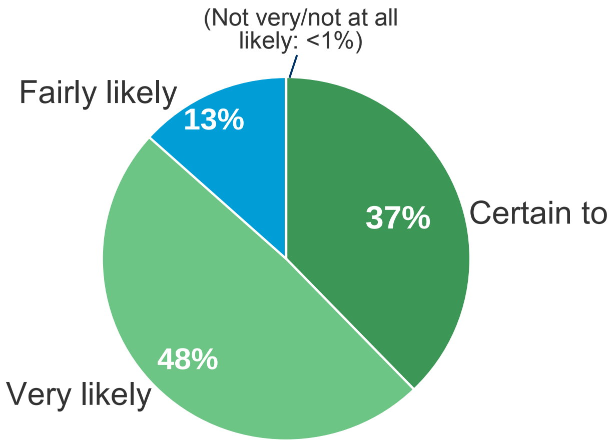
This positivity towards the area is reflected in people's likelihood to recommend it to family and friends as a destination to visit. Almost all visitors are advocates. One in three say that they are certain to recommend it, while half of all visitors say that they are very likely to do so.

Those who are visiting cafés/shops tend to be stronger advocates (45% certain to, compared to 31% who have not visited), as are those visiting by themselves (49% certain to, compared to 37% overall).

A fifth of all visitors gained information about their trip from a word-of-mouth recommendation; significantly, almost all say that they'd be likely to recommend the South Bank as a destination to friends or family.

Recommending the South Bank

How likely would you be to recommend South Bank to your friends and relatives?



Base: All visitors (322), Autumn 2008

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Given these overall positive ratings, it is perhaps unsurprising that two out of three visitors say that nothing needs to be done to make their visit more enjoyable. Of those who do give a suggestion, one in ten feel that it could be cleaner (12%) and the same proportion say that they'd like to see more entertainment and street theatre (12%).

Areas for improvement are relatively few…

Is there anything that South Bank could do to make this visit more enjoyable for you?

63%: 'Nothing'

…those who did make a suggestion say:

Base: All visitors (322) and all expressing an opinion (106), Autumn 2008

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The South Bank environment

The South Bank environment

Residents and employees were asked to rate the South Bank environment on a number of measures such as personal safety, street lighting and the number of rough sleepers.

Overall, the findings were positive; however there are some aspects that require improvement – especially the provision of public toilets.

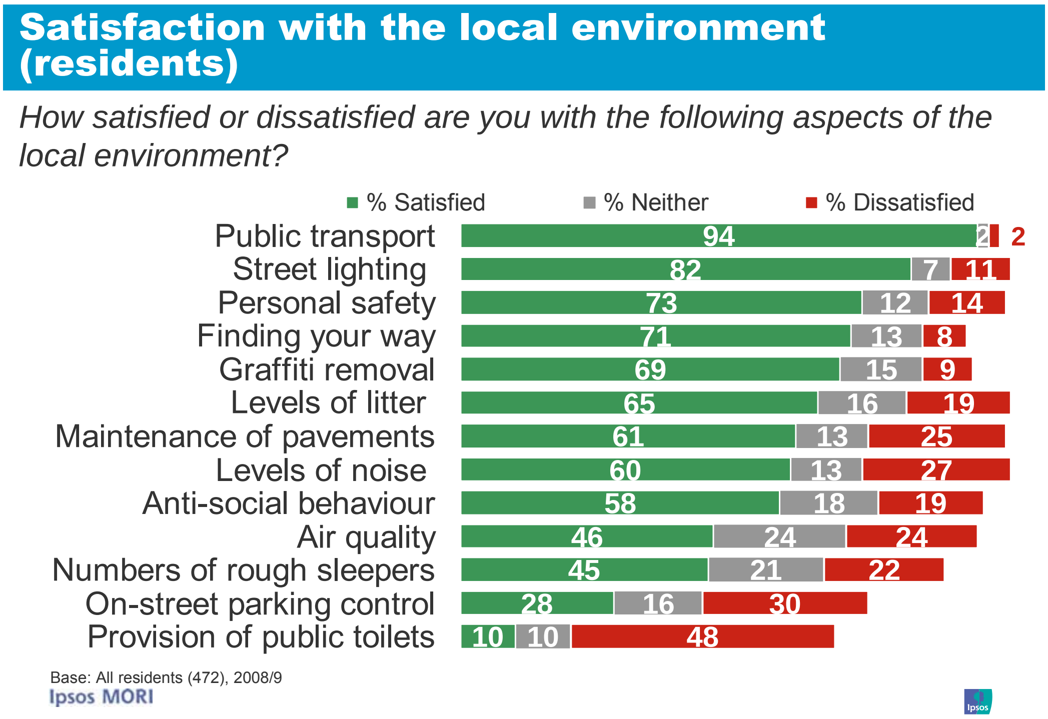
Residents

Residents are very positive about public transport and street lighting, and broadly satisfied with personal safety (although 13% are dissatisfied with this). More than seven in ten (72%) are satisfied that they can find their way around using the signs provided. Almost seven in ten (69%) of residents are satisfied with graffiti removal; and almost two thirds (65%) are satisfied with the level of litter (just under one fifth are dissatisfied with this (19%)).

Provision of public toilets and on street parking provision are identified as key areas for improvement. The number of rough sleepers is also an area of comparatively high dissatisfaction, although residents do not perceive it to be the problem that employees do. Residents in Bishop's Ward are more likely to be dissatisfied with the number of rough sleepers than those in Cathedrals Ward (29% vs. 16%).

Longer term residents are most likely to be dissatisfied with on-street parking; 44% of those who have lived in their home for 6 to 15 years and 38% of those who have been there 16+ years are dissatisfied.

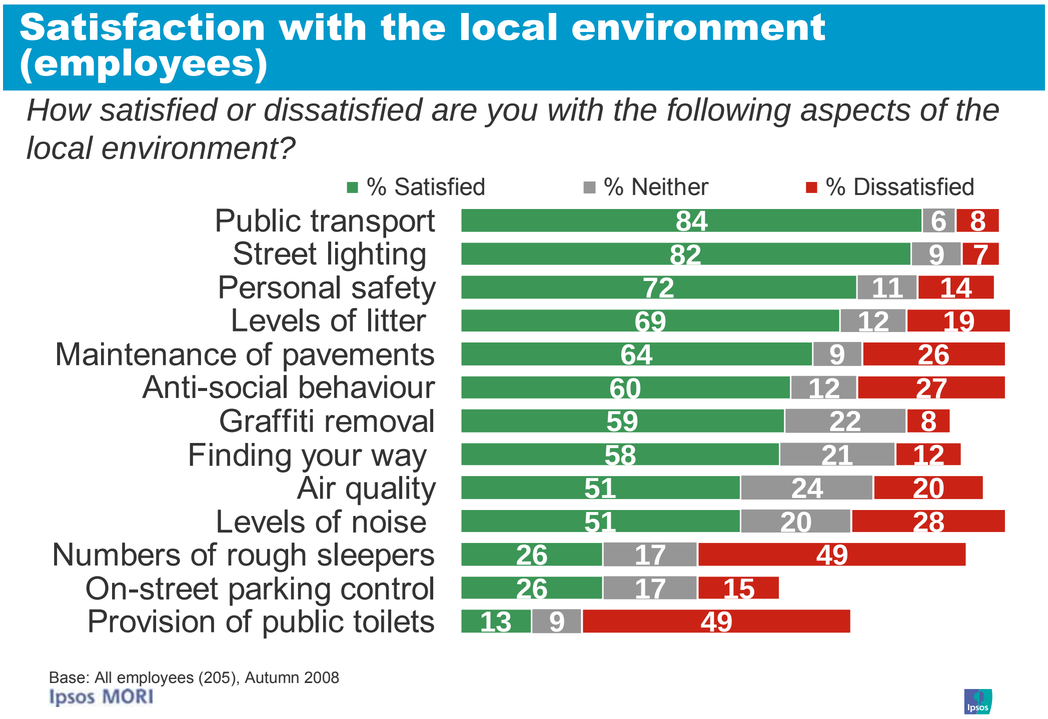
Dissatisfaction with provision of public toilets is also higher among long-term residents; 62% of those who have lived in their property for 6 to 15 years are dissatisfied.
Just over a quarter (27%) of residents are also dissatisfied about the level of noise around the South Bank.



Employees

Given the fact that four out of five employees use public transport to get to work, it's encouraging to know that satisfaction with this provision is very high (84%). Street lighting and personal safety are also well regarded, as are litter levels (although nearly one in five employees (18%) are dissatisfied with this last measure).

However, there are areas where there is room for improvement. Many of these are similar to the views held by residents: for example, almost half of employees are dissatisfied with the provision of public toilets in the area (49%) and the same proportion of employees are dissatisfied with the number of rough sleepers (please see chart overleaf).

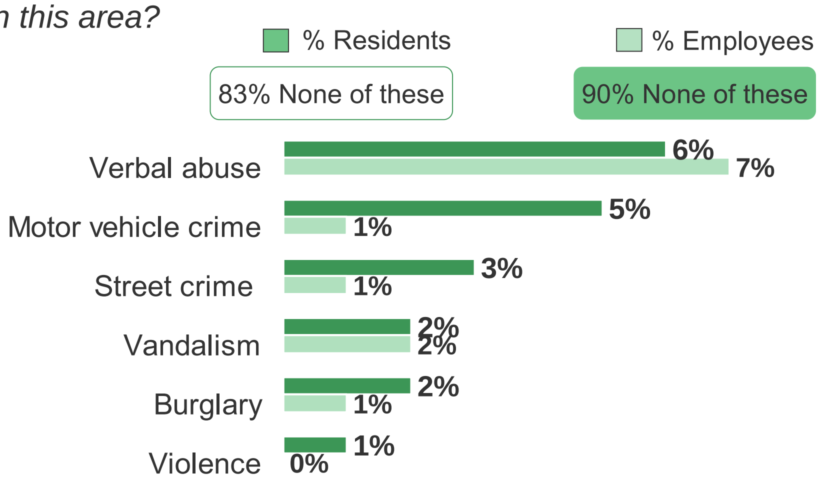


Crime

Experience of crime in the area is fairly low. Nine out of ten employees and more than four in five residents have ***not*** been victims of any of the types of crime listed in the questionnaire. This is reflected in the positive scores for personal safety in the South Bank. Of those that have experienced crime, the most common is verbal abuse, reported by 6% of residents and 7% of employees interviewed. In addition, 5% of residents said that they had been the victim of motor vehicle crime. In all other categories, the number of victims involved is too low to base statistically reliable analysis upon.

Fairly low experience of crime in the area

In the past 12 months, have you been a victim of any of these crimes in this area?



Base: All residents (472) and employees (205), 2008/09

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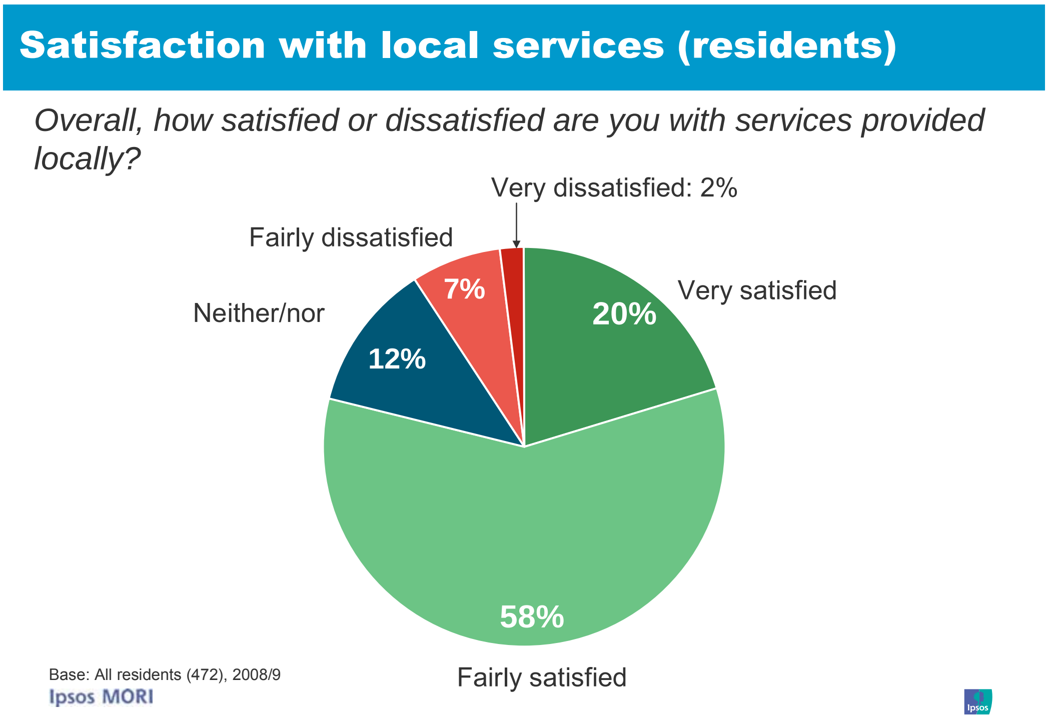
The South Bank's services and facilities

The South Bank's services and facilities

Overall, residents are satisfied with local services and very few feel these have declined over the past five years. However, there is a lower level of satisfaction in relation to sports facilities; both residents and employees are especially critical of the swimming facilities in the area.

Local services

Residents are generally happy with the services provided locally; almost four in five (78%) are satisfied, including 20% that are 'very satisfied'. Only one in ten are dissatisfied (9%). There is little distinction between age group or length of residence, however those living in Bishop's Ward are far more likely than those in Cathedrals Ward to be 'very satisfied' (28% vs. 13%) with local service provision.

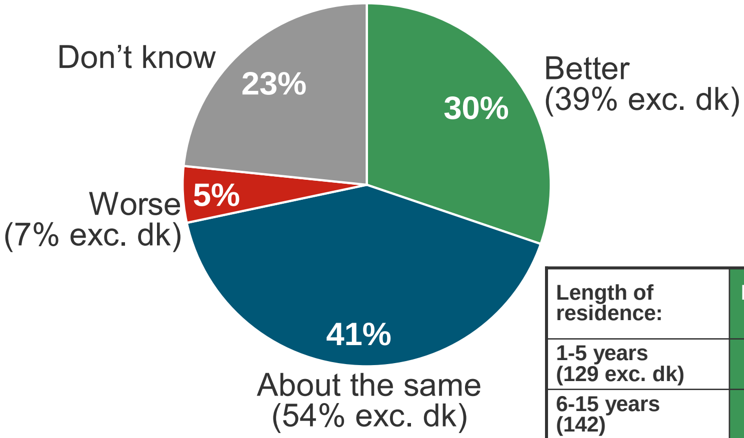


Three in ten residents feel that local services have improved over the last five years (30%), while only one in twenty feel that they have got worse (5%). Again, a high proportion say that they don't know (22%), having not lived in the area for five years. Excluding don't knows, almost two in five say that the area has improved (39%), almost one in ten feel that it has got worse (8%), and more than half say that it hasn't changed (54%).

Residents who have lived in the area for between one and five years are more likely to say that services are better, while those who have lived in the area for more than 16 years tend to feel that there has been no change. If we relate this back to longer term residents being significantly more likely to state that the area as a whole has got worse as a place to live (30% 16 yrs+), it is evident that this perceived overall deterioration is *not* due to a decline in local services.

Change over the last five years: local services

Taking everything into account, would you say local services have got better, worse or remained the same during the ***last five years****?*



Length of residence:	Better %	About the same %	Worse %
1-5 years (129 exc. dk)	46	50	4
6-15 years (142)	38	50	8
Over 16 years (103)	28	60	10

Base: All residents (472), 2008/9 (excluding don't knows: 361)
Base sizes shown in brackets
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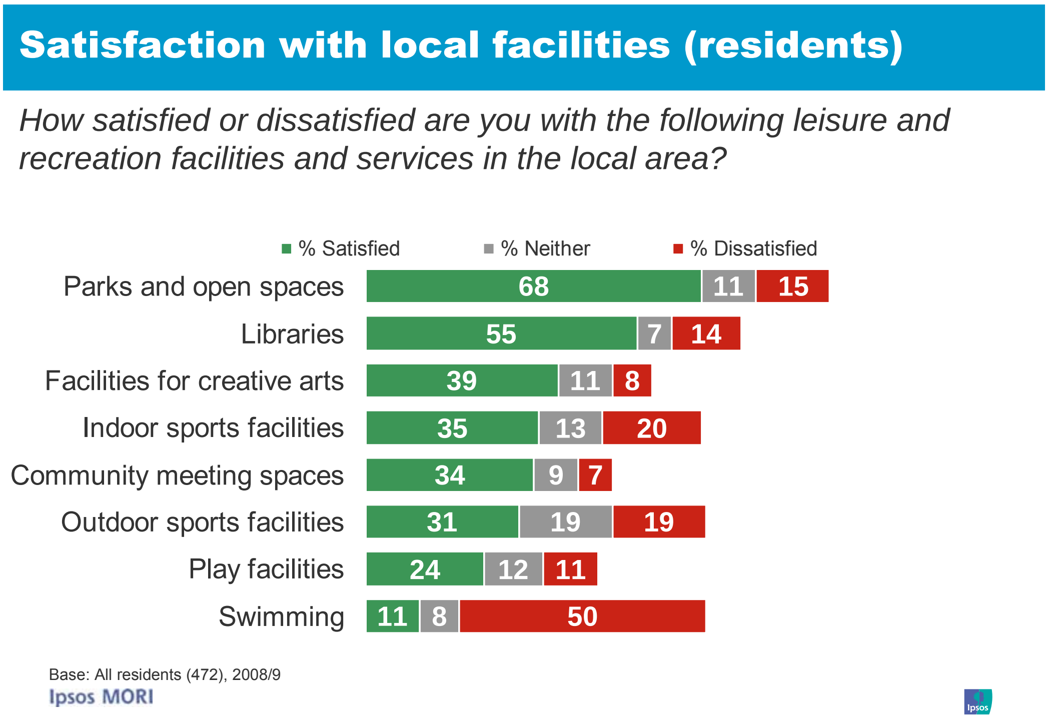
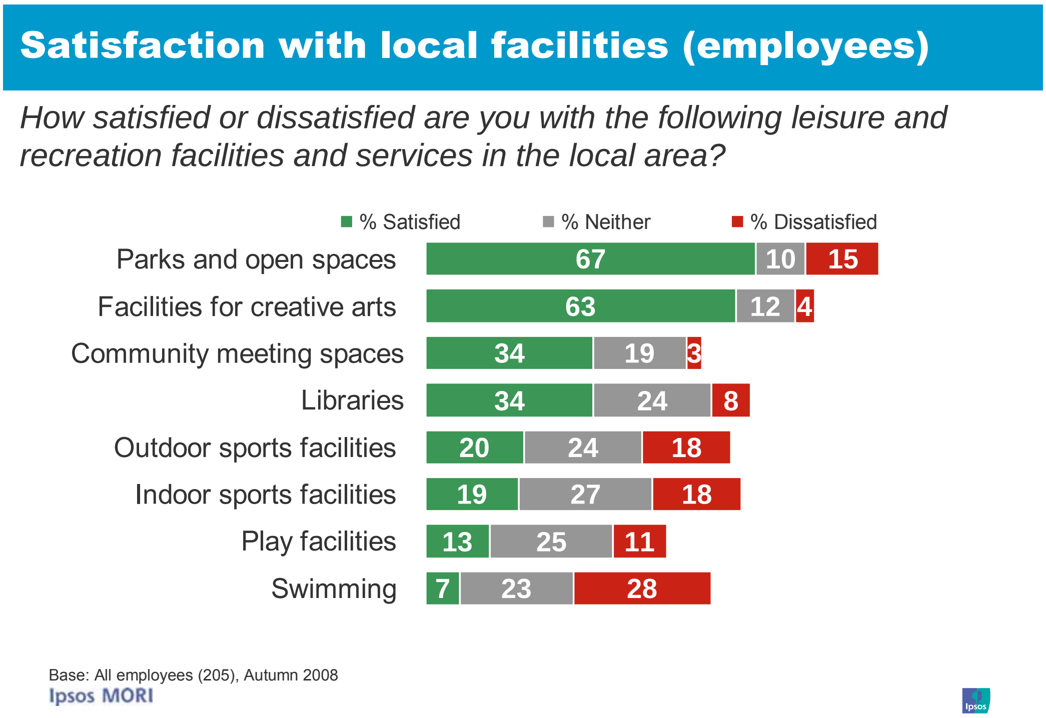
Satisfaction with local services and facilities

Many residents and employees do not know enough about local services and facilities in order to pass judgement, and of those who do, satisfaction is mixed. Parks and open spaces are particularly appreciated by both groups (68% residents, 67% employees satisfied), with a larger majority able to express an opinion on these. Facilities for creative arts, and community meeting spaces also tend to have low levels of dissatisfaction (8% or under dissatisfied in each audience); as do play facilities (11% dissatisfied in each audience), although these are clearly used by a lower proportion of both groups. Satisfaction with libraries tends to be fairly positive, particularly among residents (55% residents; and 34% employees satisfied), although there is also some level of dissatisfaction (14% residents; and 8% employees dissatisfied).

The swimming facilities prompt the greatest level of dissatisfaction among both residents and employees. Only 7% of employees are satisfied with the swimming facilities in the area, compared with 28% who are dissatisfied. There is an even greater level of dissatisfaction among residents with these facilities; half (50%) are dissatisfied, including 32% who are very dissatisfied, with only 11% satisfied.

Sports provision (both indoor and outdoor) tends to be somewhat polarising, with similar proportions of both residents and employees being satisfied and dissatisfied (residents — around a fifth dissatisfied compared to around a third satisfied; employees — around a fifth dissatisfied compared to around the same proportion satisfied). This indicates that while certain needs are being met, others are not.

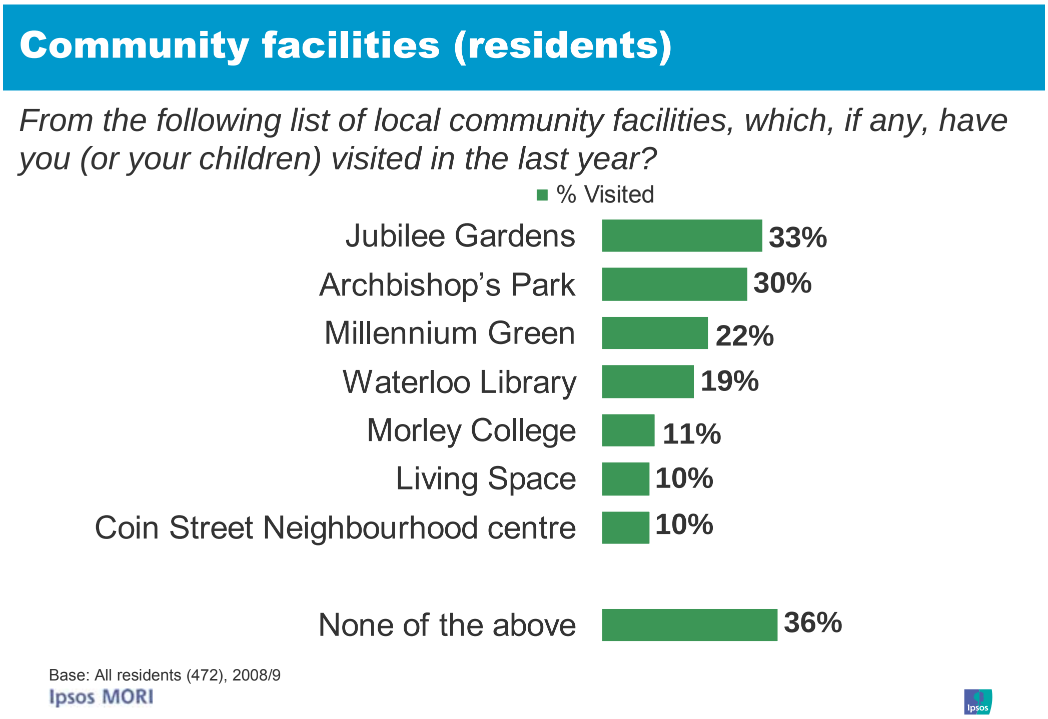




Community facilities

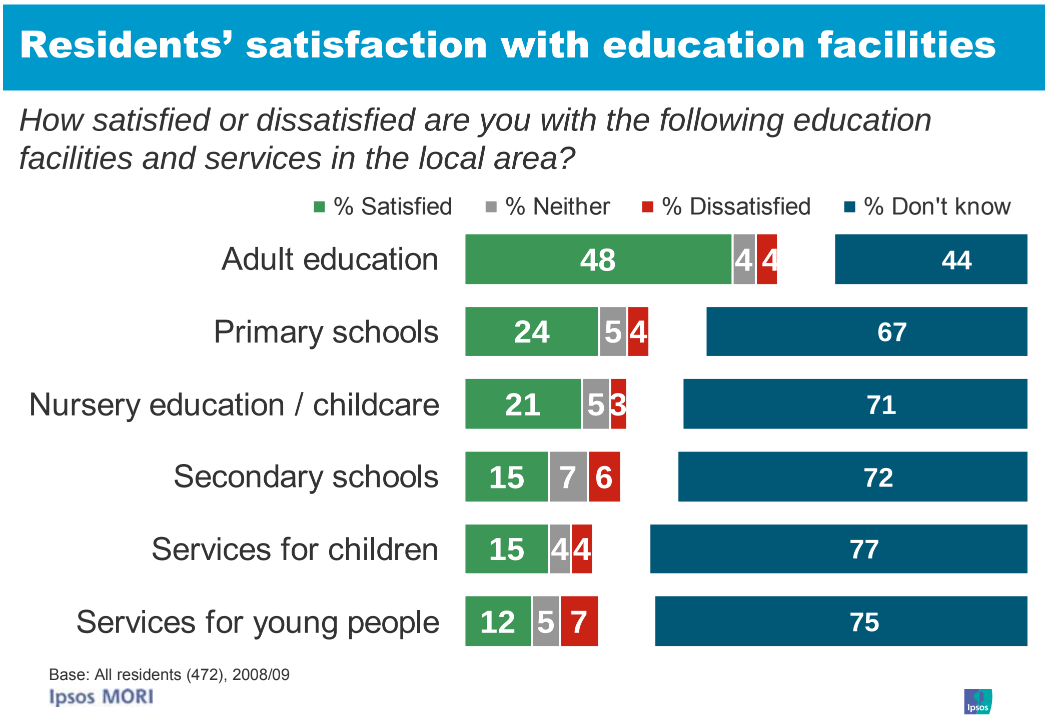
Almost two thirds of residents have visited at least one of the community facilities in the area in the past year. Those living in Cathedrals Ward are more likely *not* to have visited any of them (42% vs. 29% in Bishop's Ward). Those aged 35 to 54 tend to visit the most attractions – 15% have visited between five and ten compared with 3% of those aged 16 to 24.

Jubilee Gardens (33%), Archbishop's Park (30%), Millennium Green (22%) and Waterloo Library (19%) are the most visited.

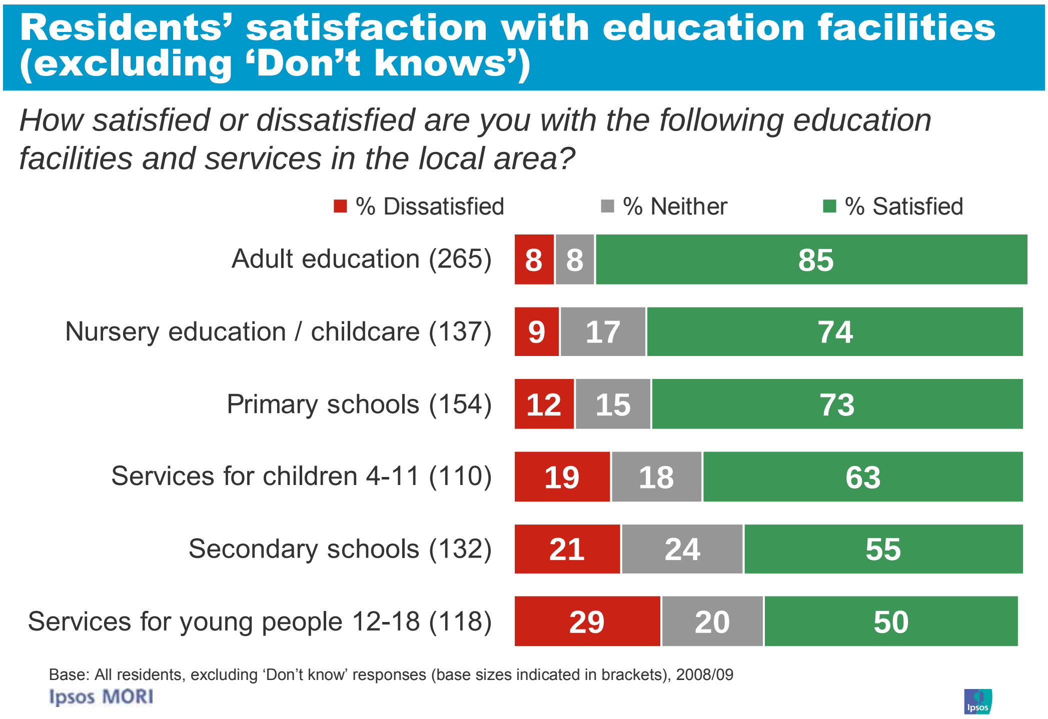


Education facilities

Opinion of education facilities is high among residents. Satisfaction is highest with the adult education facilities in the area; 48% are satisfied (19% 'very satisfied') compared with 4% who are dissatisfied. Indeed, positive opinion is greater than negative opinion across all measures, albeit with high levels of 'Don't know'.

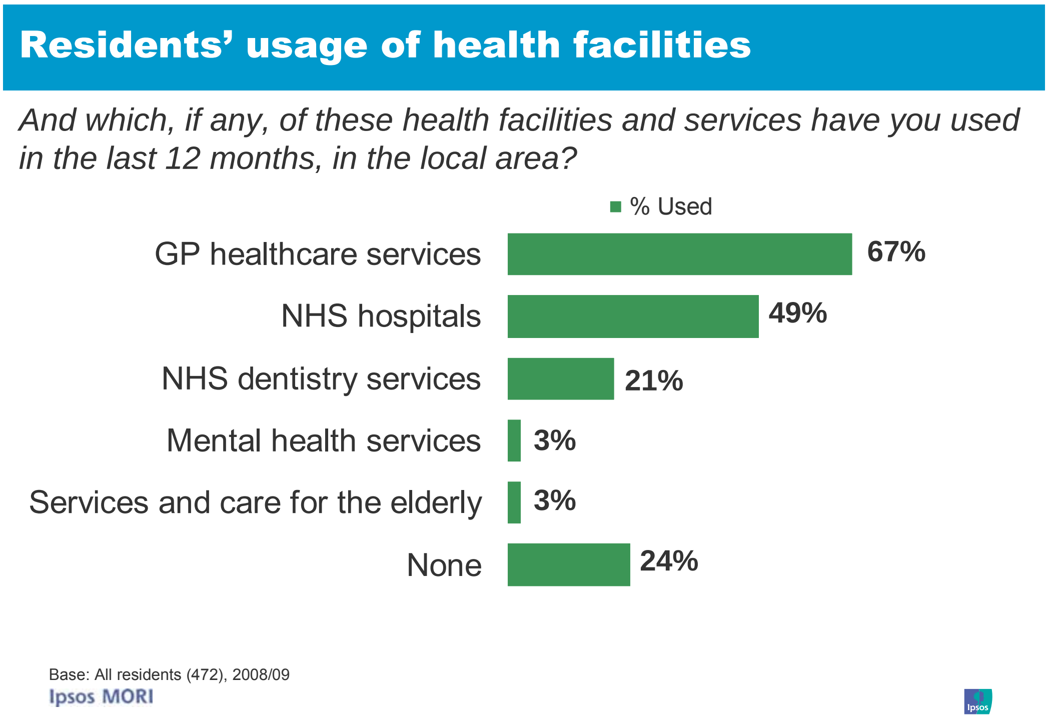


Removing 'Don't know' scores demonstrates the extent to which satisfaction outweighs dissatisfaction on the whole. The highest level of dissatisfaction is for secondary schools and services for young people. In both cases negative opinion is more prevalent among C2DE residents (please see chart opposite).

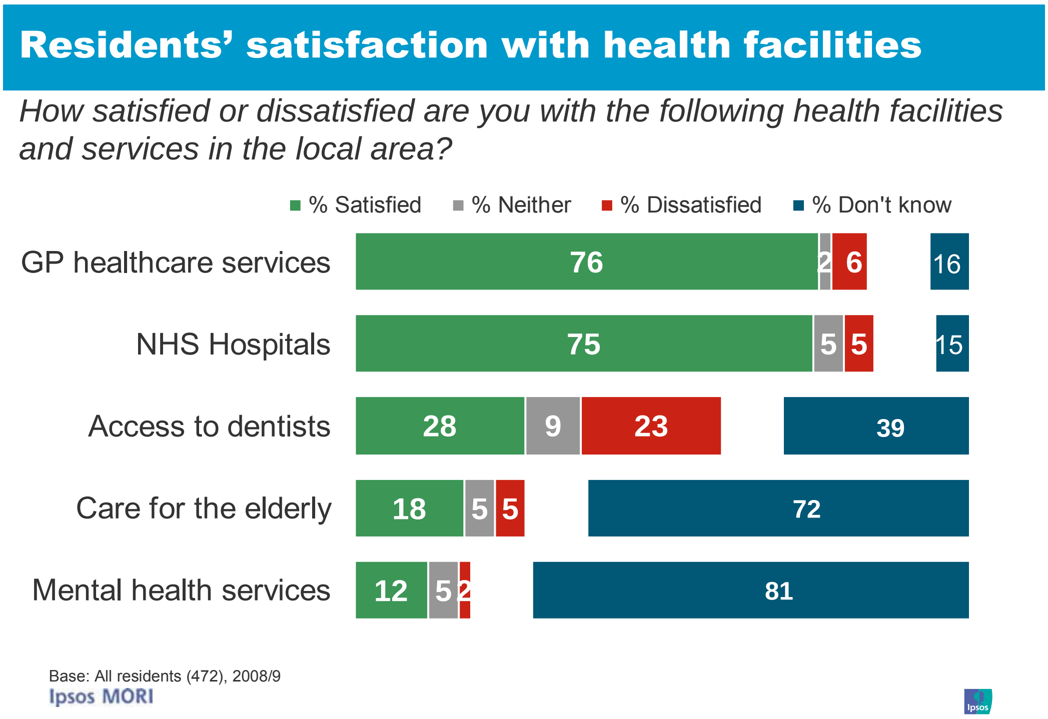


Health facilities

Two thirds (67%) of residents have used GP healthcare services in the past 12 months, and almost half, an NHS hospital (49%). One fifth have used NHS dentistry services, and a very small minority have used mental health services and/or services and care for the elderly (both 3%). Almost a quarter (24%) of residents have used none of these services, while almost half (48%) have used at least three of the facilities.

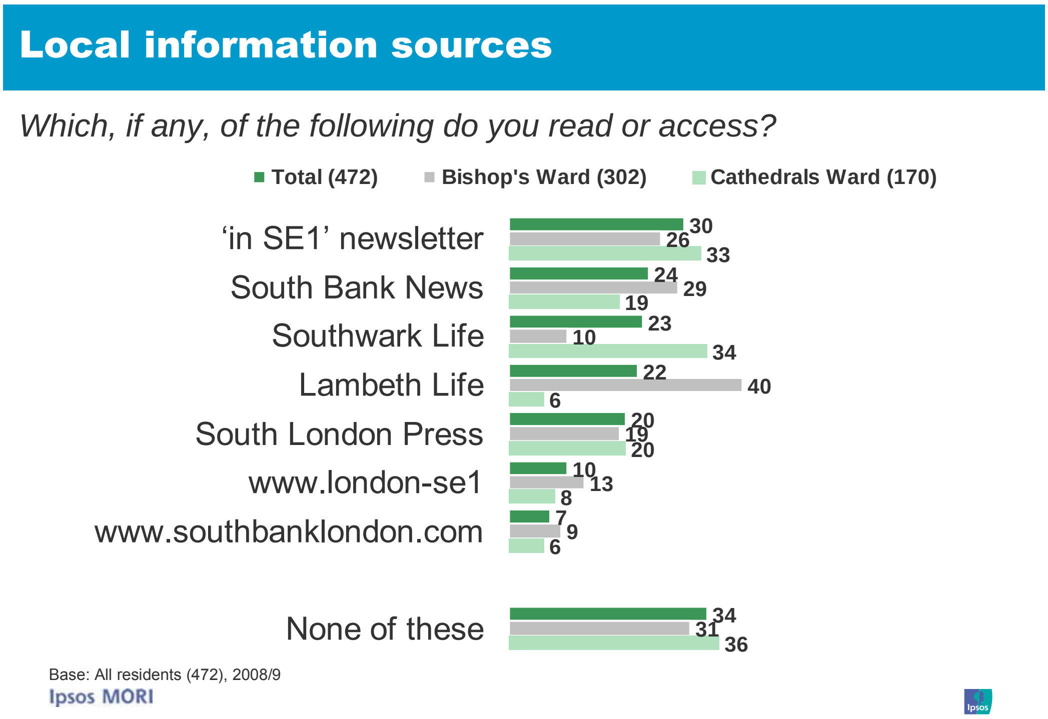


Positive opinion dwarfs negative in terms of access to GPs and NHS hospitals, however this is not the case for NHS dentists; 28% are satisfied compared with 23% dissatisfied. The minority that have had cause to use elderly care or mental health services are generally satisfied.



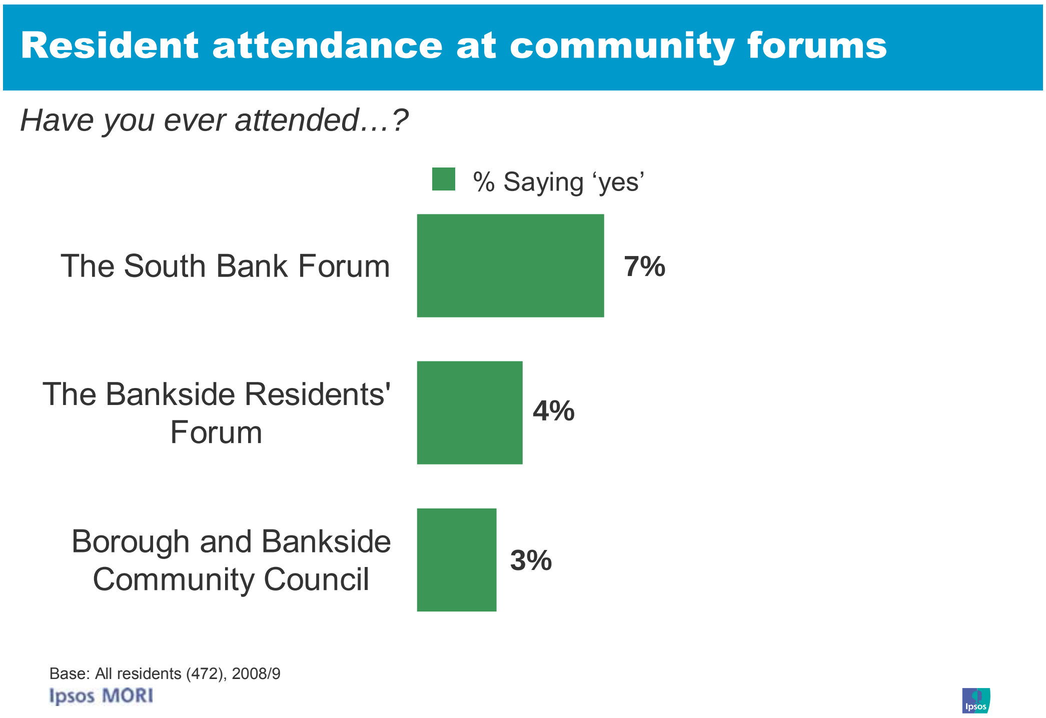
Local information sources

There is a fairly high readership of local news sources, with just a third of respondents (34%) reading/accessing *none* of the listed sources. 'in SE1' newsletter commands a readership of three in ten residents, while South Bank News, Southwark Life and Lambeth Life are read by around a quarter of residents (24%, 23% and 22% respectively). As would be expected, residents in Cathedrals Ward are significantly more likely to read or access Southwark Life (34%), although it also reaches 10% of residents in Bishop's Ward. Conversely, residents in Bishop's Ward are significantly more likely to read or access Lambeth Life (40%), with 6% of residents in Cathedrals Ward reading or accessing this publication.



Attendance at community forums

Fewer than one in ten (7%) have ever attended the South Bank Forum, although this is still an encouraging level of engagement with the local community. Those aged 55+ are considerably more likely to have done so than those aged 16 to 34 (19% vs. 1%). Those living in the area for at least six years are also more likely to have attended the South Bank Forum; 98% of those living in the area for five years or less have never been. 4% of residents have attended the Bankside Residents' Forum, and 3% the Borough and Bankside Community Council. Again, older residents and those who have been living in the area for a longer period of time are more likely to have attended.



Shopping and dining

Shopping and dining

Satisfaction with dining facilities is high among residents, employees and visitors. However, visitors do not explore what's on offer on Lower Marsh and The Cut, which conversely, is a popular destination for residents and employees.

Many visitors do not visit the shops and dining facilities in the area, which reflects their purpose of visiting attractions in the area, or simply enjoying the area.

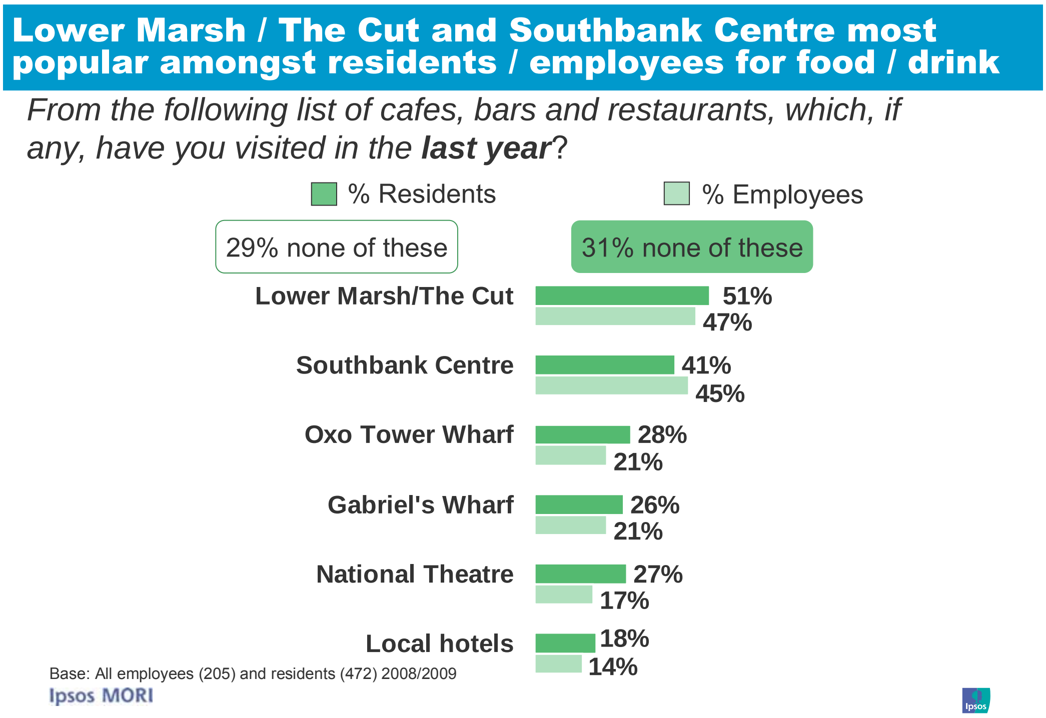
Residents are less satisfied with the shopping facilities in the area than other service areas, which indicates that this could be an area requiring development, although it will need to be balanced against a greater understanding of their needs.

Residents and employees

Seven in ten residents have visited at least one of the locations listed in the area for refreshments, in the past year. Those aged 55+ (45%), BME residents (53%) and those who have lived at their current address for more than 16 years (45%) are most likely to have visited none.

Half of residents (51%) have visited Lower Marsh and The Cut which is particularly popular among those aged 35 to 54 (63% of this age group have visited). The Southbank Centre (41%) and Oxo Tower Wharf (28%) are also popular places to go. Younger residents have a greater tendency to use refreshment facilities in the local hotels than older residents (24% compared with just 5% of those aged 55+).

As with residents, seven in ten employees have visited at least one of the cafés, bars and restaurants listed, in the past year. As with visitors, the Southbank Centre is very popular, 45% of all employees having been there. However, The Cut is the most popular destination – nearly half have visited at some point over the last year. This represents a sharp contrast with the visitors survey; practically none visited this area.

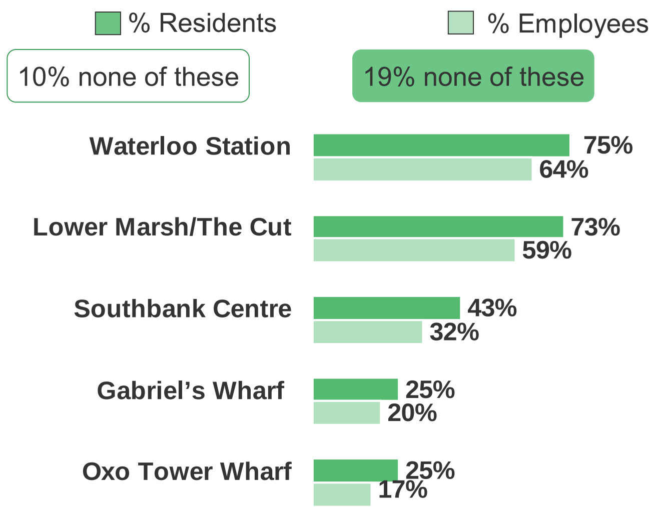


Nine in ten residents have visited one of the shops in the area. Waterloo Station (75%) and Lower Marsh and The Cut (73%) attract the most residents. It is significant that more than a quarter of residents have never visited Lower Marsh given its status as the district shopping centre for the area. It is also significant that Waterloo Station is such a popular shopping destination for residents. Younger people aged 16 to 34 are more likely to use Waterloo Station (80% shop there) while a significant proportion (89%) of those between 35 and 54 go to Lower Marsh and The Cut.

The majority of employees have visited shops in Waterloo Station (64%), reflecting the fact that many travel through the station on their journeys to work. Again, Lower Marsh and The Cut are also well frequented – six in ten have visited shops there in the last year. One in five had not visited shops at any of the locations listed (19%).

Lower Marsh / The Cut and Southbank Centre also popular amongst residents / employees for shops

*In the **last year** have you visited the shops in any of these locations?*



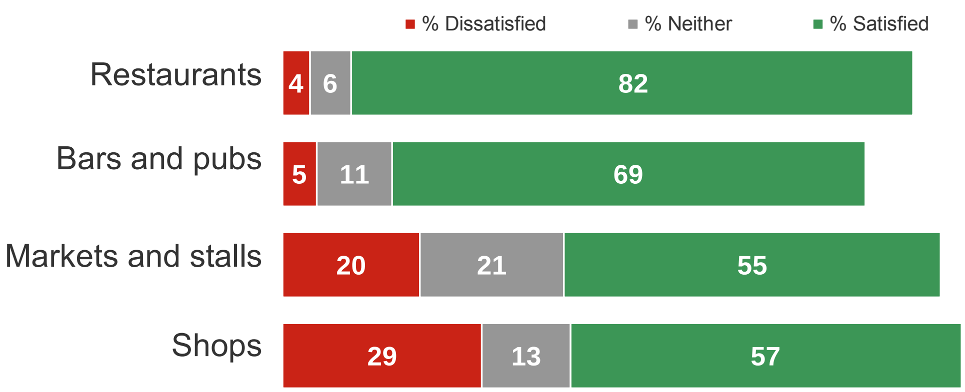
Base: All employees (205) and residents (472) 2008/2009

Ipsos MORI

Residents are happy with the range of restaurants on offer; four in five (82%) are satisfied with this. They are also broadly positive about bars and pubs (69% satisfied) and parks and open spaces (68%) but as with employees, are less positive about shops. Fewer than three in five are satisfied (57%), with 29% dissatisfied with the range of shops in the area. Older residents aged 55 and over are the most likely group to be dissatisfied with the shopping facilities (39%, including 14% that are 'very dissatisfied').

Satisfaction with local facilities (residents)

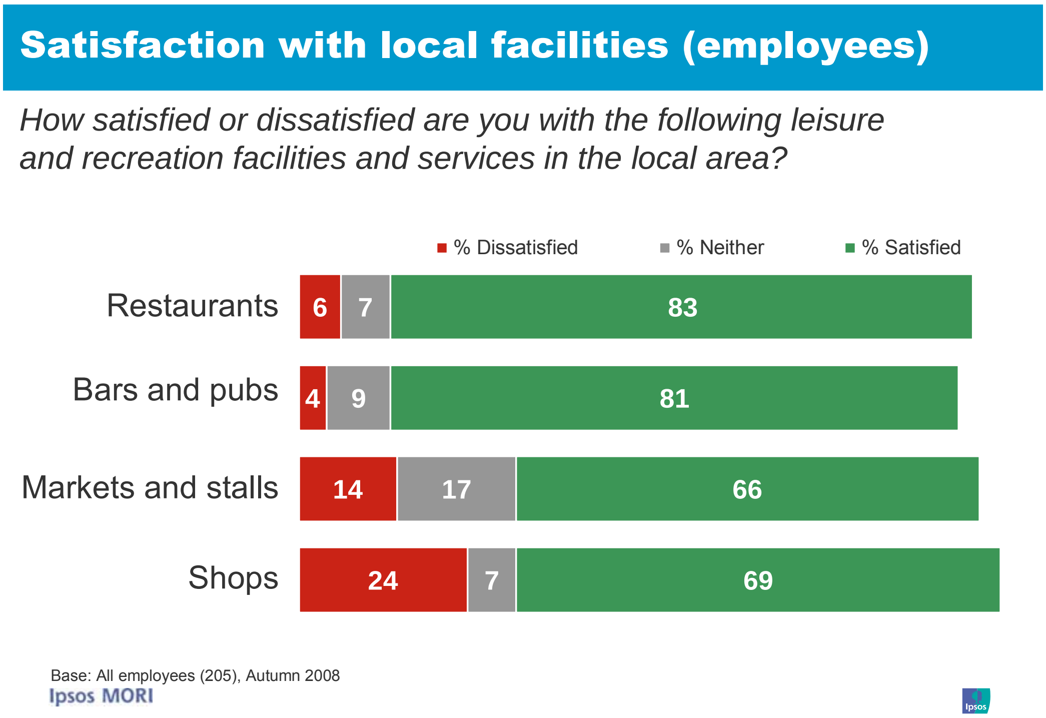
How satisfied or dissatisfied are you with the following leisure and recreation facilities and services in the local area?



Base: All residents (472), 2008/9

Ipsos MORI

Employees are also very positive about the range of restaurants, bars and pubs in the area. In each case at least eight out of ten say that they are satisfied. Seven in ten (68%) are satisfied with the range of shops; although conversely one in four (24%) say that they are dissatisfied, indicating a needs gap for some.



Visitors

Although only a minority of visitors had visited cafés, bars or restaurants in the area (30%), one in five had done so at the Southbank Centre (19%). The Southbank Centre was also the biggest shopping draw. While only one in four visitors had used the shopping facilities in the South Bank (24%), one in ten had done so at the Southbank Centre. This suggests that perhaps more could be done to promote the area as a destination for dining and shopping, particularly given that people who do visit shops and restaurants in the South Bank rate them highly.

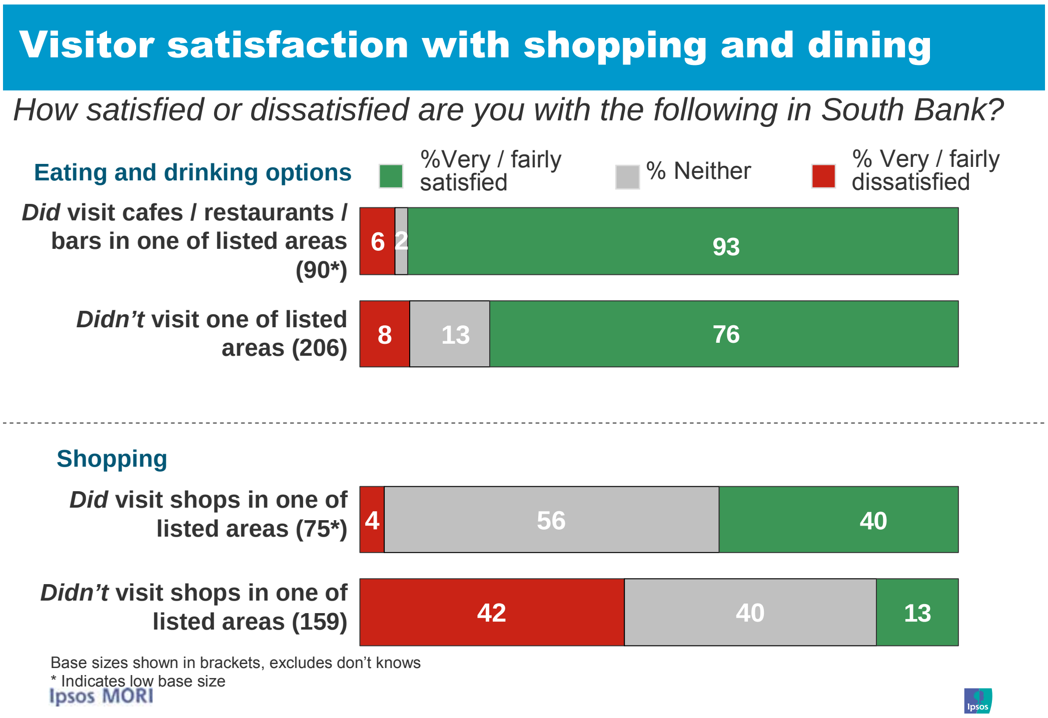
Cafés and restaurants were more popular during the weekend (40% had visited at least one during the weekend, compared to 27% of those interviewed during the week).

Half of those interviewed around Coin Street had visited cafés/restaurants in the Southbank Centre – this was also one of the groups most likely to rely on previous visits to the South Bank for information on the area (46%).

Satisfaction with eating and drinking options was highest around the National Theatre (86%) and Coin Street (89%). It was also higher during the weekend (when a greater percentage of people had actually visited a café or restaurant), which indicates that eating and drinking options are more of a destination at the weekend.

It is interesting to note that while there was greater satisfaction with the eating and drinking options among those who *had* visited them (90%), satisfaction was still high among those who *hadn't* visited them (78%). This indicates that their non-usage of such facilities were more due to a lack of need per se, rather than the facilities not meeting their needs.

Satisfaction with shopping facilities was much lower among both those who had used these facilities (43%) and those who hadn't used them (37%). Tellingly, 13% of those who hadn't used the shopping facilities were *dissatisfied* with them, indicating that possibly they had needs that weren't being met by the shopping facilities available.



Local attractions

Local attractions

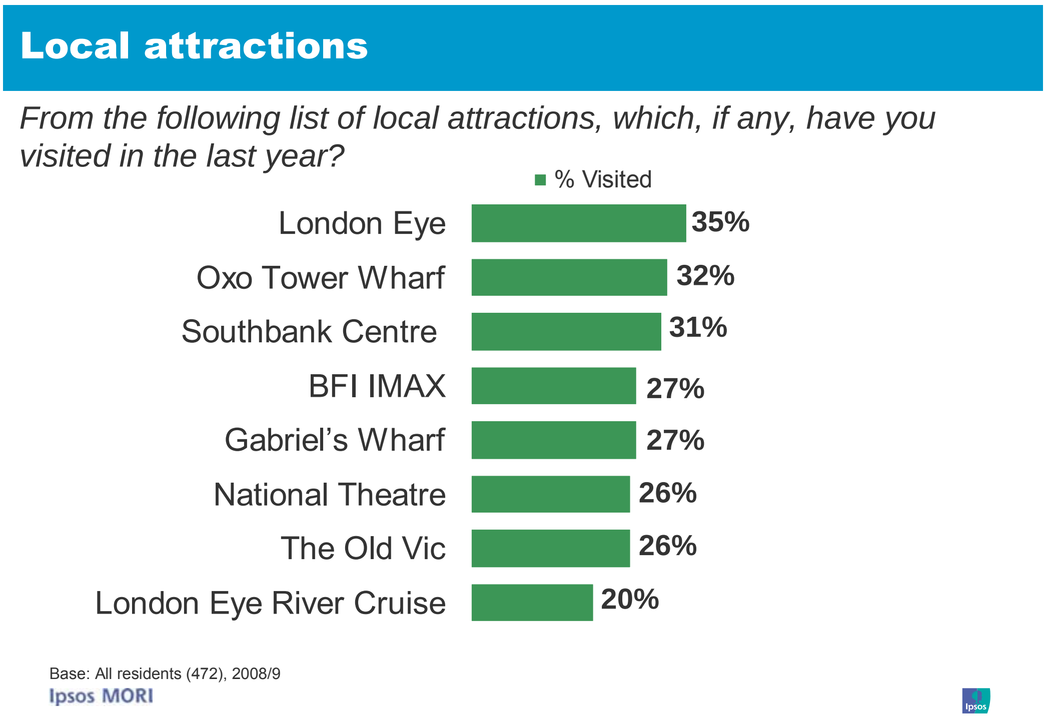
The South Bank's attractions are its strongest pull, with attractions being the main reason stated by visitors for visiting the South Bank area. The London Eye is a particular pull. Local attractions are also visited by many residents and employees in the area.

Visitors and employees were offered a range of adjectives that might be used to describe the South Bank. Overall, both groups chose fundamentally positive descriptions, although it is perceived to be crowded, particularly around the London Eye area, and employees are particularly sensitive to the expense.

Residents

The majority of residents (83%) have been to at least one of the listed attractions on the South Bank, and one in ten have been to 11 or more. The most popular attraction is the London Eye (35%), followed by Oxo Tower Wharf (32%), the Southbank Centre (31%) and BFI IMAX, and Gabriel's Wharf (both 27%).

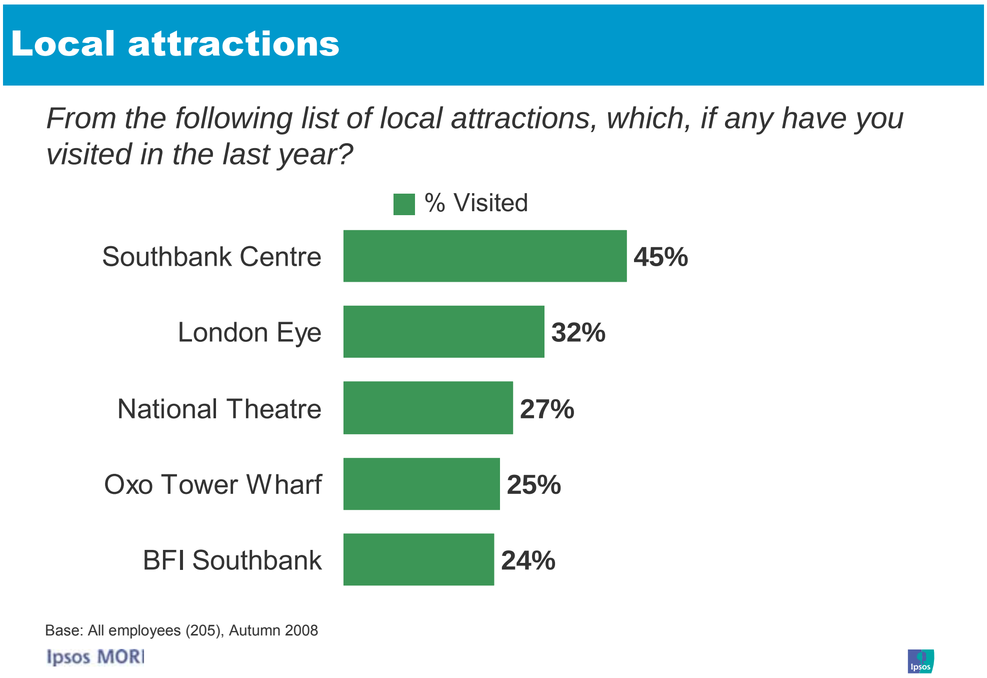
Younger residents are generally more likely to visit the attractions on the South Bank. Only 13% of those aged 16 to 34 have visited none in the last year, compared with 34% of those aged 55 and over. BME residents are less likely to have visited an attraction (25% visited none vs. 13% White residents), as are those of a C2DE background (31% visited none vs. 4% AB and 12% C1).



Employees

Many employees make use of the opportunity that working in the area provides them to visit local attractions. Interestingly, employees who live in Lambeth and Southwark are not necessarily more likely to visit these attractions than employees who live outside the immediate area.

The most popular attraction is the Southbank Centre, visited by nearly half (45%) of employees. Women are far more likely to have made a visit here than men (59%, compared to 36%). The London Eye and National Theatre are also popular destinations. In contrast to the visitors survey, the BFI Southbank is relatively well attended by employees – one in four of whom have made a visit in the last year (24%).



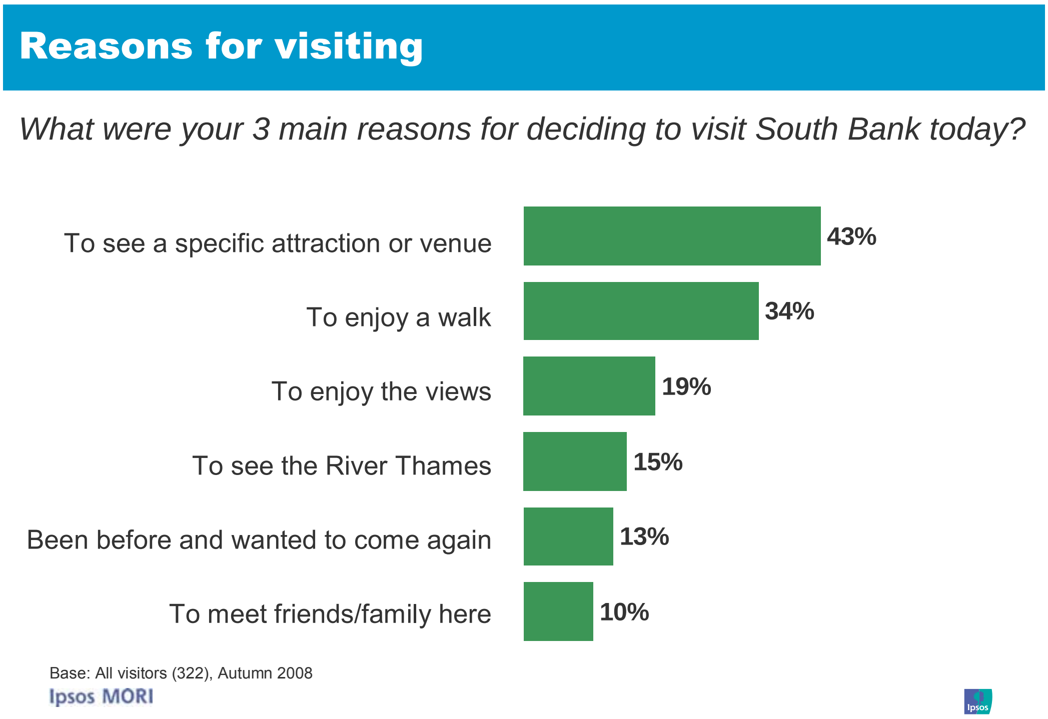
Visitors

The top attraction for visitors is the London Eye. One in three respondents had already visited, or intended to visit it when we spoke to them (32%). The next most popular destinations were the Southbank Centre (18%) and the London Aquarium (13%).

In general, visitors from overseas were far more likely to be visiting attractions than Londoners, both in the South Bank and in the surrounding area. This was particularly true of the London Eye which was a destination for almost half of all European visitors (49%), and a similar proportion of visitors from the rest of the world (44%). By comparison, only 10% of Londoners had visited or were visiting it on the day of the interview.

Three in five visitors had been to at least one of the attractions listed on the questionnaire (59%). People visiting the area in a group were more likely to visit at least one attraction than those visiting on their own.

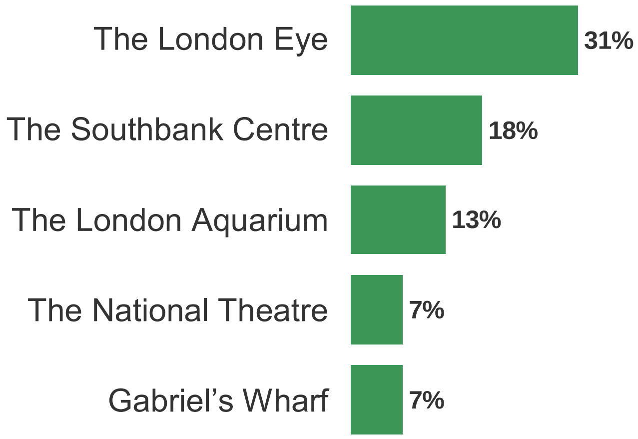
People making their first visit to London are also more likely to visit multiple locations while they are in the area, as are those who have travelled from Europe or further afield, compared to UK residents. People who visited shops or cafés are also more likely to have visited multiple attractions.



People around the London Eye were more likely to be visiting to see a specific attraction (53%), while those interviewed around the Royal Festival Hall and the National Theatre were most likely to be enjoying a walk (46% and 44% respectively).

Visitor attractions

From the following list of local attractions, which, if any have you visited/do you intend to visit today?



Base: All visitors (322), Autumn 2008

Ipsos MORI

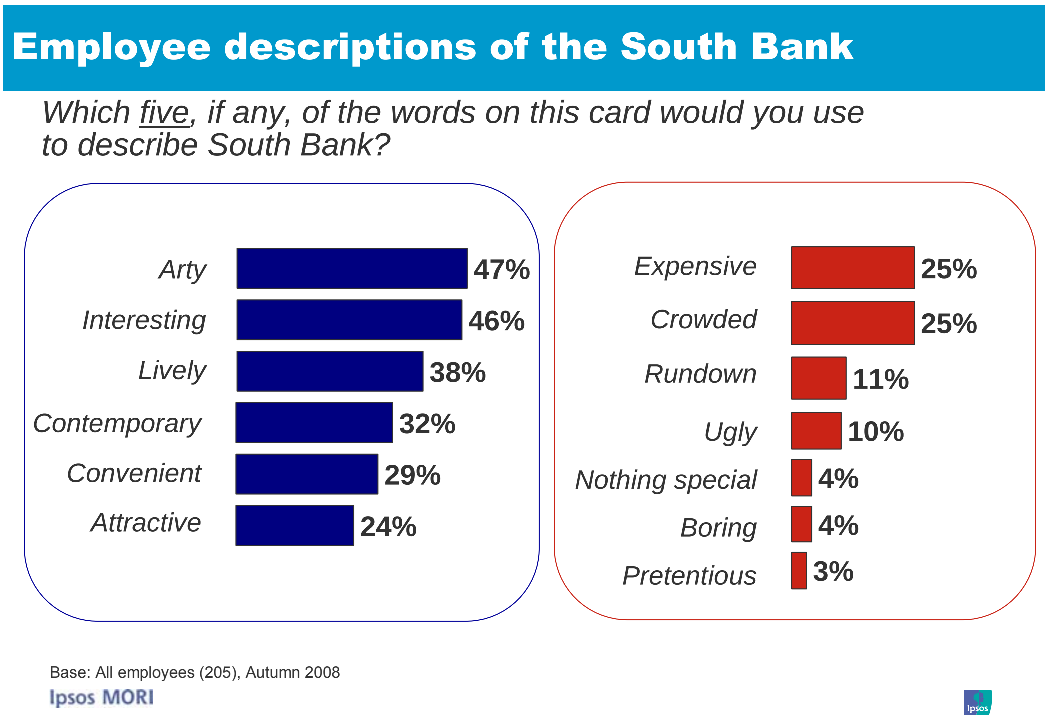
Perceptions of the South Bank

Perceptions of the South Bank[1]

Employees

Interestingly, employees and visitors select many of the same words to describe the South Bank, even though their reasons for visiting are very different. Nearly half of employees describe the area as arty (47%) and interesting (46%), and two in five describe it as lively (38%). Understandably though, far fewer employees describe the South Bank as relaxing (13%, compared to 33% of visitors to the area).

One in four employees say that the area is expensive (25%) and the same proportion feel that it is crowded. There is also a notable proportion stating the area is rundown (11%) and ugly (10%).



Visitors

Visitors have a positive opinion of the area, describing it as interesting (48%), arty (38%) and attractive (37%). Very few visitors use negative adjectives and no one describes it as boring or ugly.

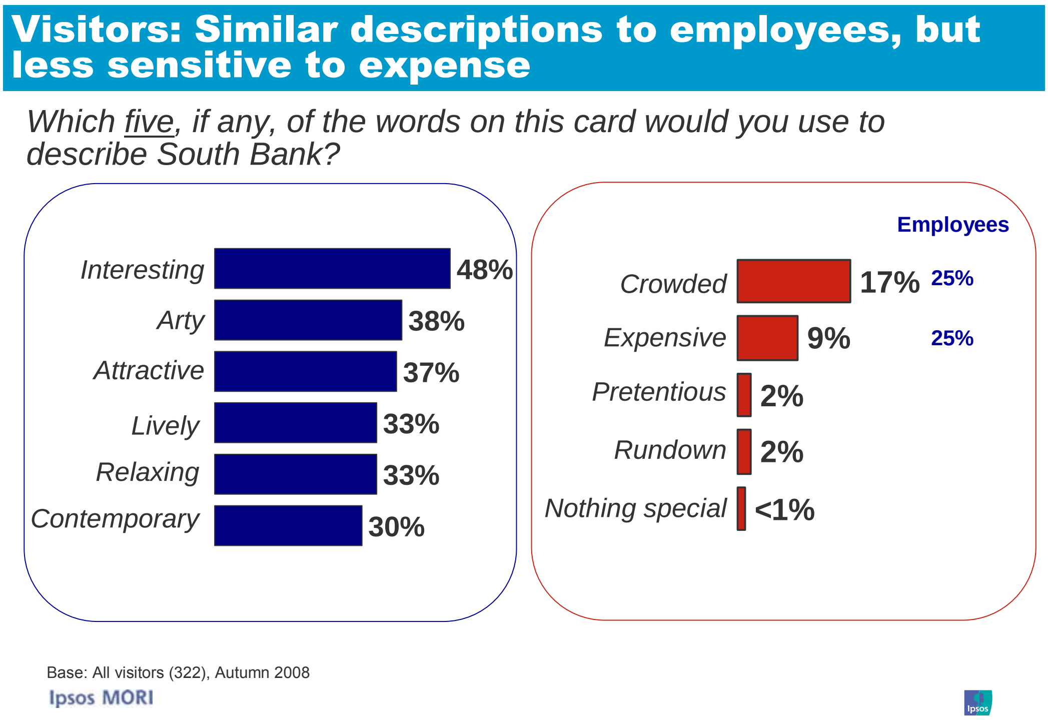
[1] This question was not included in the residents survey.

Almost half of the visitors from London are most likely to describe the South Bank as arty (47%), although less likely to describe it as attractive than other visitors (just 28%, compared to 41% of Europeans and 51% of visitors from outside Europe).

A third of those visiting with children feel it is crowded (32%, compared to 14% with no children), almost half (47%) describe it as family-friendly (compared to 15% with no children) and 37% describe it as fun (compared to 20% with no children), perhaps reflecting the fact that this is the group most likely to be visiting specific attractions in the area.

Those interviewed around the National Theatre were most likely to describe the area as *arty* (47%). Those around the Royal Festival Hall thought it was *relaxing* (47%) – perhaps because many had come to enjoy a walk. Those around the London Eye described it as *lively* (44%) and *fun* (47%).

The area where people were most likely to describe the South Bank as *crowded* was around the London Eye (46%). People were also far more likely to use this description during the weekend (23% of visitors, compared to just 2% of those interviewed during the week). That said, during the weekend more people were also likely to describe the area as *lively* (36% compared to 23% during the week) and *fun* (26%, compared to 15% during the week).



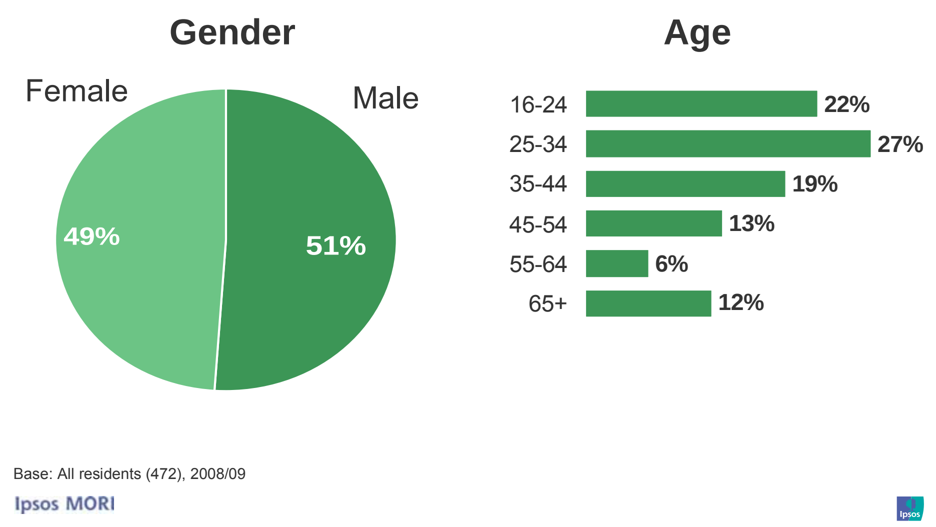
Respondent profile

Respondent profile

Residents

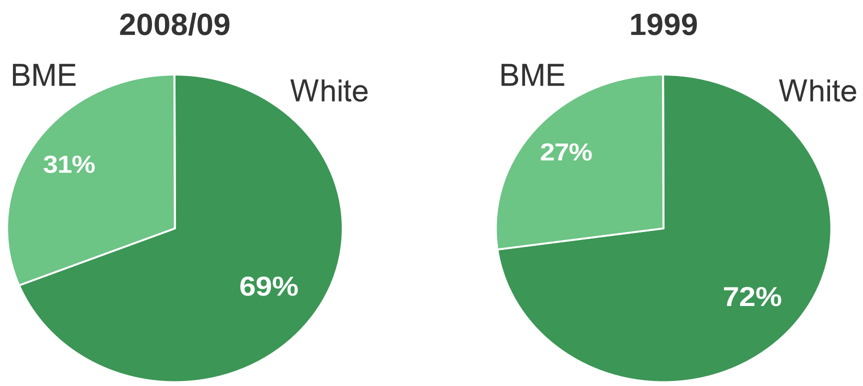
The South Bank has a fairly young resident population. Half (49%) are aged under 35, and a further 19% are under 45. However, there is also a sizeable population around retirement age (12% are 65+).

Gender and age



Seven in ten (69%) are of a White background although not necessarily British (48% British vs. 21% non), with 15% Black, 6% Asian and 5% Chinese.

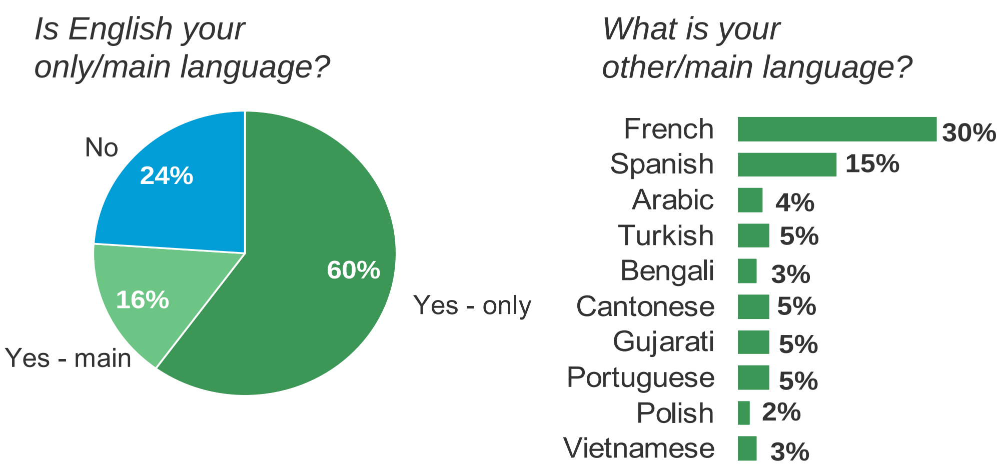
Ethnicity



Base: All residents (472), 2008/09
Ipsos MORI

Three quarters (76%) of residents speak English as their sole or main language.

Language

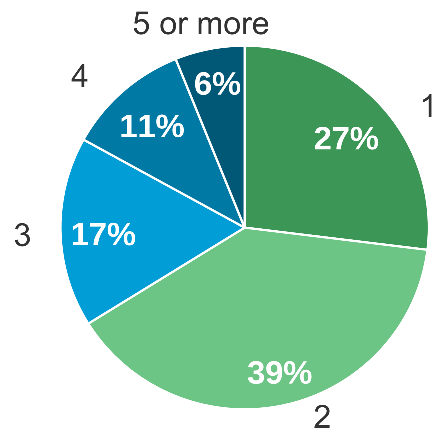


Base: All residents (472) and all residents who speak another language (185) 2008/09
Ipsos MORI

Two-person households are the most common, with two in five (39%) properties housing two people. Almost three in ten (27%) live alone.

Size of household

How many people are there living here – that includes yourself, any other adults and children?



Base: All residents (472), 2008/09

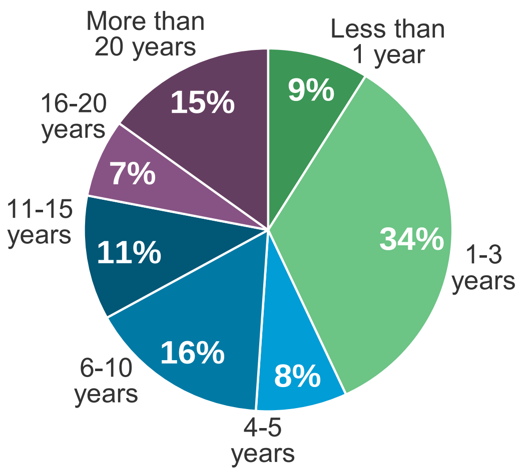
Ipsos MORI

More than two in five (43%) have lived at their current address for three years or less; however a sizeable proportion have been at the same residence for a substantial period, with more than one in five (22%) having been at the same property for at least 16 years.

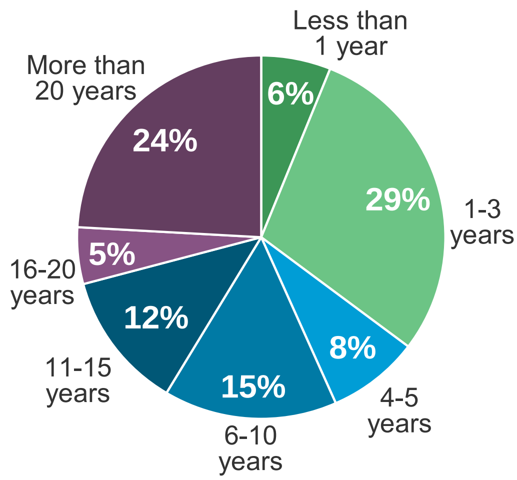
Duration of residence

How long (in years) have you lived…

…at your current address?



…in this area?

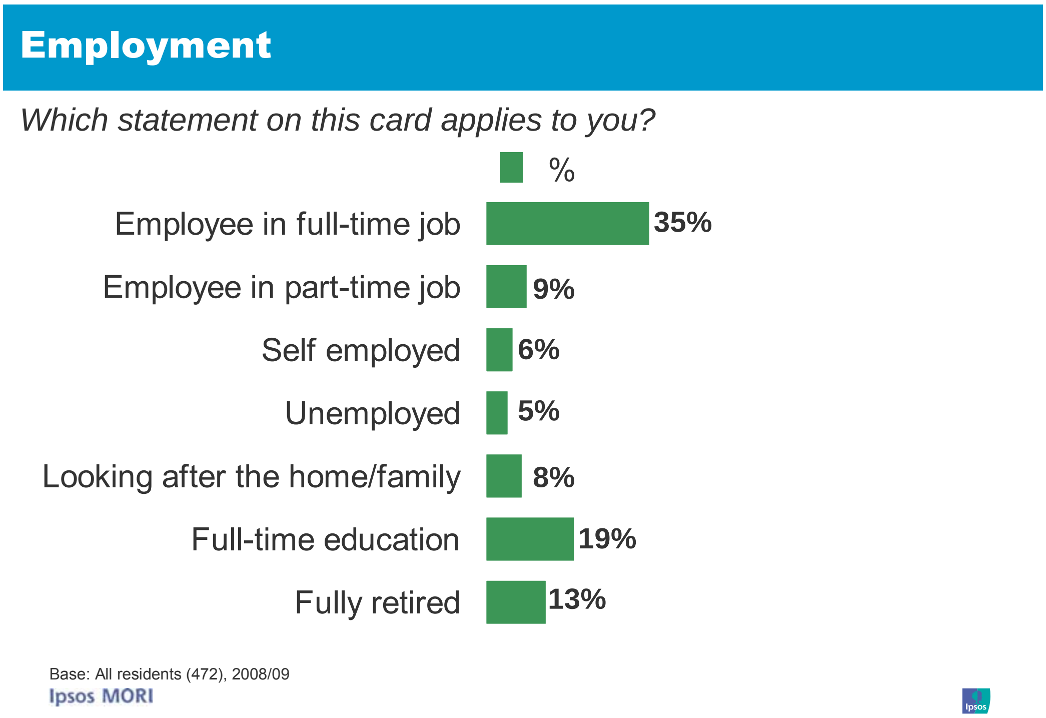


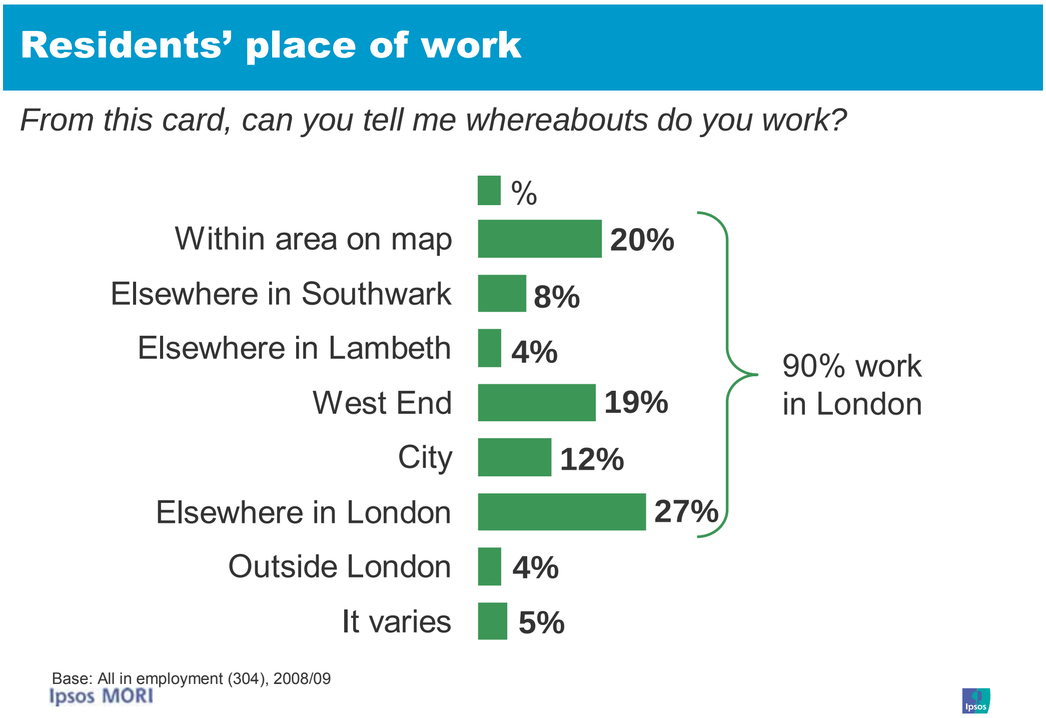
Base: All residents (472), 2008/09

Ipsos MORI

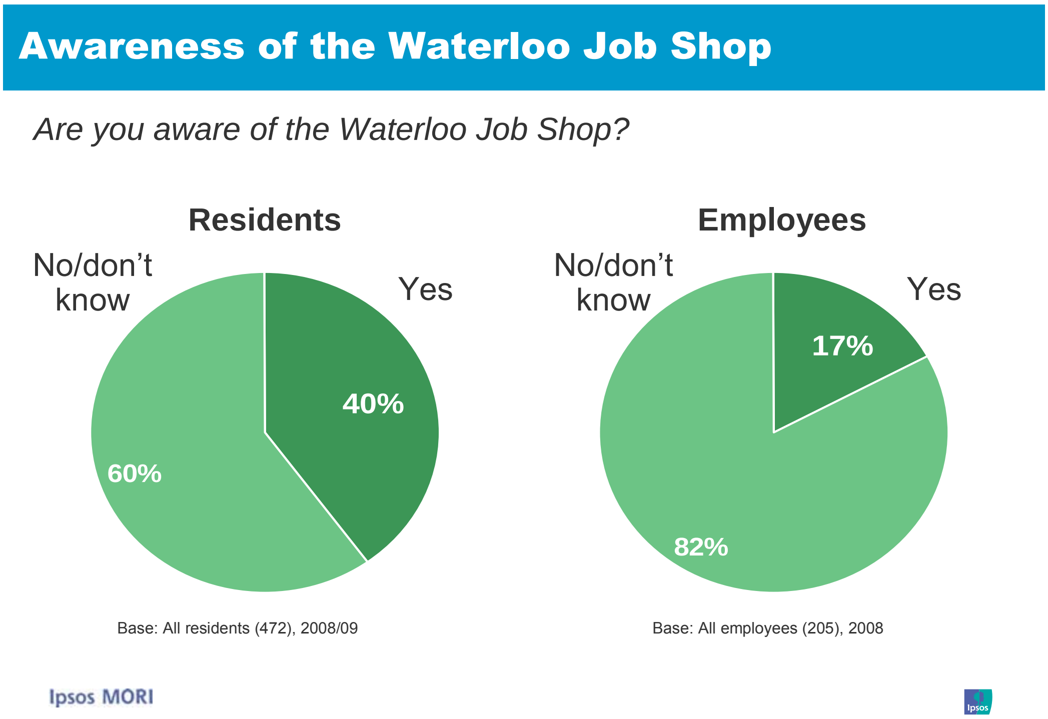
Residents' work status

Over a third of residents are in full-time work and 5% are unemployed. The majority of those in work are London-based.





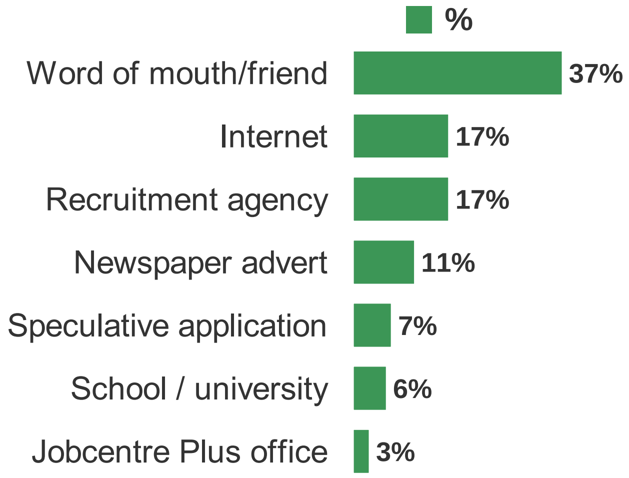
Two fifths of residents (40%) are aware of the Waterloo Job Shop. Residents who have been living in the area for a longer period of time are more likely to be aware (47% of those who have been living in the area for six years plus are aware); as are those of lower social grade (50% C2DE aware). This compares to 17% of employees who are aware of the Waterloo Job Shop. This rises to 35% of employees who live in Lambeth or Southwark.



For residents in employment the strongest information source in finding their current job was word of mouth (37%), with the internet (17%) and recruitment agencies (17%) also common methods.

Word of mouth is the most common way to find employment

How did you find your current job?



Base: All in employment (304), 2008/09

Ipsos MORI

Job seeking

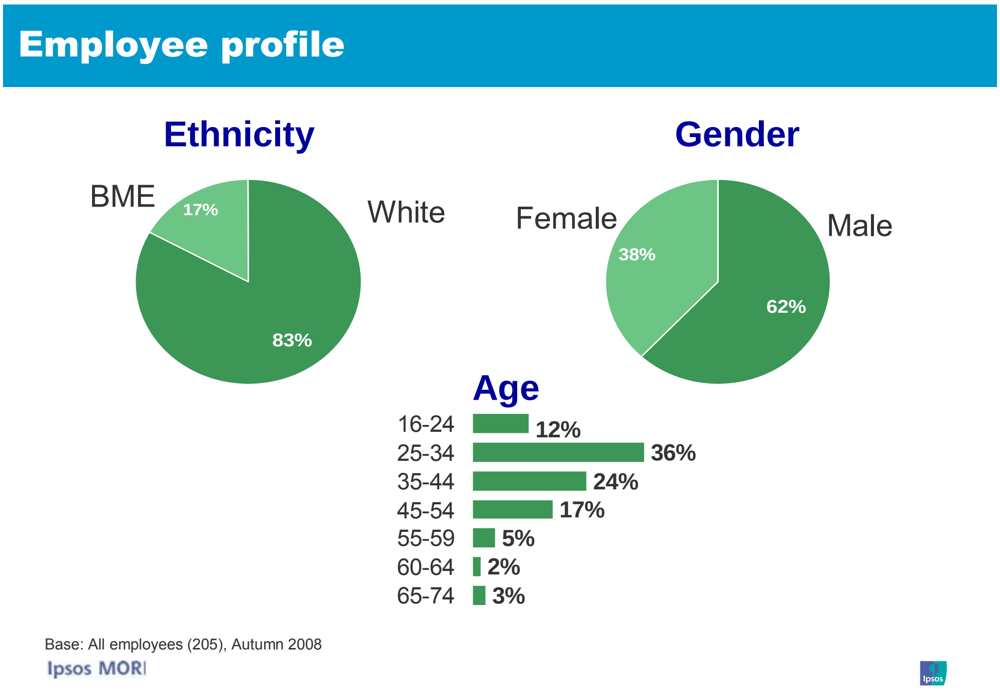
With just 21 respondents currently unemployed and seeking work (either registered unemployed or not registered, but seeking work) it is not possible to speak in terms of percentages. The greatest proportion (n9) have been unemployed for less than six months,[2] with a further four respondents who have been unemployed for six months to a year. In the past twelve months fifteen unemployed residents have received one of the listed forms of support (note that the question is multi-code so some respondents have selected more than one of the options). This corresponds to sixteen unemployed residents who would appreciate one of these forms of support, although there are some areas where a greater volume of unemployed residents would appreciate particular methods of support than those who have received. This can be seen in the table below perhaps most noticeably *help with confidence building*, and *help with preparing your CV* (although this should only be seen as indicative due to the low base size).

	Have received in the past twelve months	Would like to receive
	n	n
Careers guidance/ advice on jobs	9	10
Interview skills coaching	5	7
Help with application forms	5	6
Advice on how to present yourself best	4	4
Help to improve your reading and/or writing	3	3
Help with confidence building	3	6
Help to become self-employed	2	1
Help with preparing your CV	1	4
None of these/don't know	7	6

[2] The residents survey started at the time of a looming recession, with the recession 'officially' hitting towards the end of the fieldwork period.

Employees

The workforce based in the South Bank area is predominantly white, younger and male. Three in five are aged between 25 and 44 (60%), a similar proportion are male (62%), and less than one in five comes from a minority ethnic background (17%).

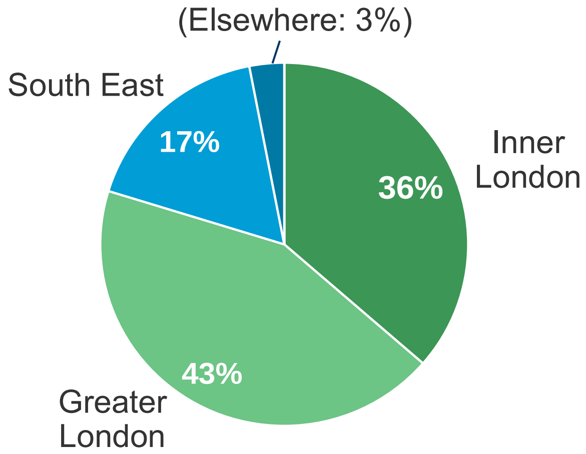


Place of residence

Unsurprisingly, eight in ten employees who work in the South Bank live in London (79%). A further one in six live in the South East (17%). The most common boroughs of residence are Lambeth (16%) and Southwark (16%). One in three identifies the area as the South Bank (33%); and more than two in five identify it as Waterloo (45% overall, 57% of those interviewed at Waterloo Station and 73% of those interviewed on The Cut).

Place of residence

Please can you tell me where you live?



Base: All visitors (322), Autumn 2008

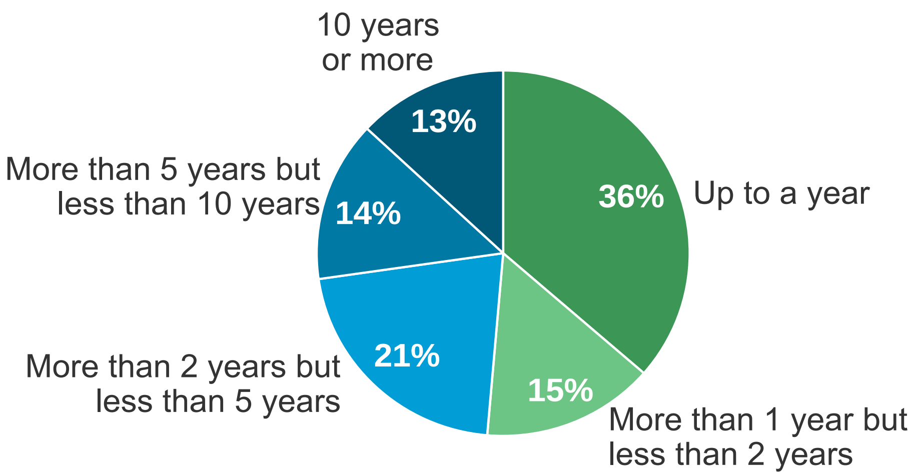
Ipsos MORI

Length of employment in the area

Length of time working in the area is fairly well spread between the short and medium term. Over one in three employees has worked in the area for less than a year (36%). The same proportion has worked there for 1 to 5 years (36%) and a slightly smaller proportion has worked there for more than five years (27%).

Length of employment in the area

How long have you worked in the local area?



Base: All employees (205), Autumn 2008

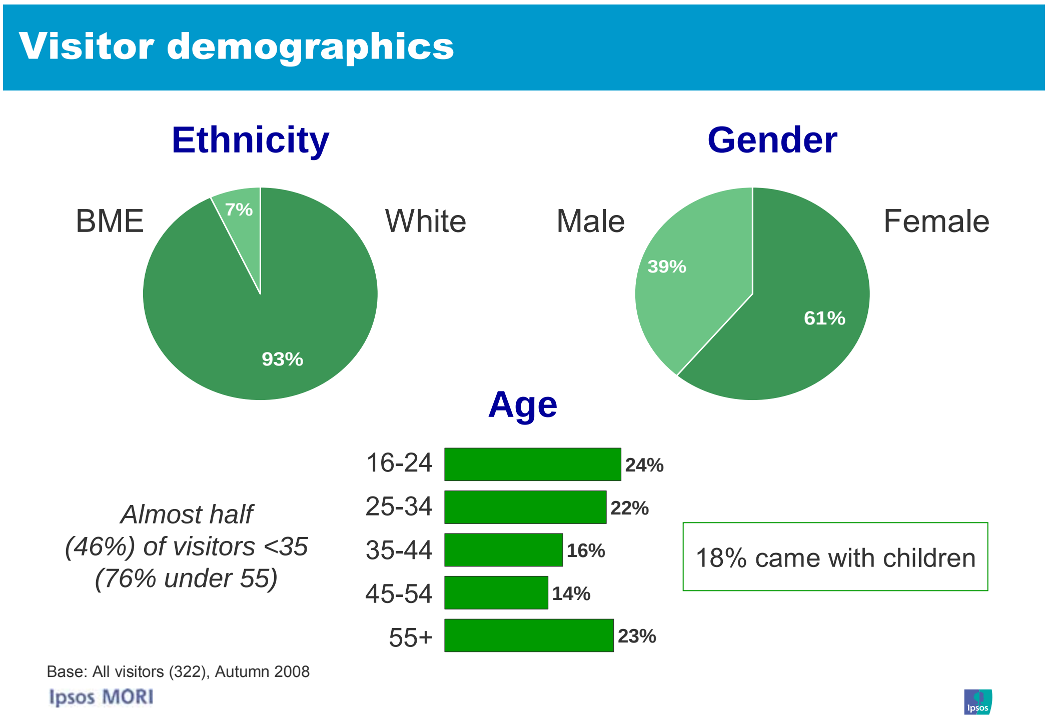
Ipsos MORI

Visitors

Visitors to the South Bank tend to be younger and white. There is a relatively high ratio of women to men.

Nearly half of all visitors are under 35 (46%), while less than one in four are over 55 (23%). As one would expect, those aged 35 to 44 were significantly more likely to have children in their party (39%), and those aged 16 to 24 likely to *not* have children in their party (29%).

Less than one in ten of visitors come from a minority ethnic background (7%).



NB – Gender profile is based on overall profile of party, rather than gender of respondent interviewed.

Place of residence

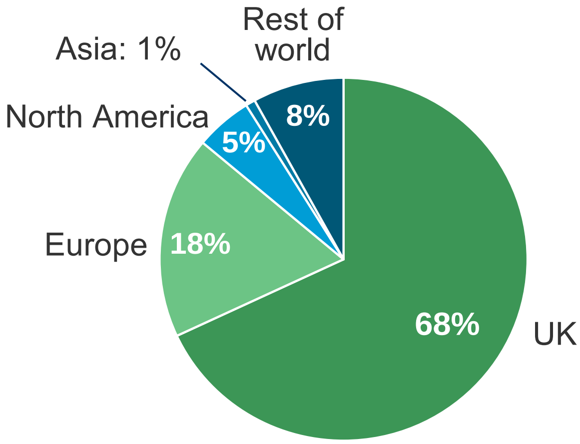
Seven in ten visitors live in the UK (68%), although within this group there is a fairly even spread of visitors coming from inner London, outer London, the South East and elsewhere in the UK. One in five lives in Europe (18%) and one in seven lives outside Europe (14%).

Of those who live outside London, two thirds are staying overnight in the capital (65%). This proportion rises to 90% of those who are visiting the city for the first time. One in five of those staying overnight, away from home, are staying in the South Bank (19%).

During weekend interviews, visitors from the UK made up 72% of all those interviewed, compared to just 57% during the week.

Place of residence

Where do you live?



Base: All visitors (322), Autumn 2008

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Appendices

Appendices

A general guide to statistical reliability

The respondents to the questionnaire are only samples of the total 'population', so we cannot be certain that the figures obtained are exactly those we would have if everybody had been interviewed. We can, however, predict the variation between the sample results and the 'true' values from a knowledge of the size of the samples on which the results are based and the number of times that particular answer is given. The confidence with which we can make this prediction is usually 95% - that is, the chances are 95 in 100 that the 'true' value will fall within a specified range. The table below illustrates the predicted ranges for different sample sizes and percentage results at the '95% confidence interval'. An indication of approximate sampling tolerances are given in the table below.

Size of sample on which the survey results are based	**Approximate sampling tolerances applicable to percentages at or near these levels**		
	10% or 90%	**30% or 70%**	**50%**
	±	±	±
100 interviews	6	9	10
200 interviews	4	6	7
400 interviews	3	5	5
500 interviews	3	4	4

For example, with a sample of 205 where 30% give a particular answer, the chances are 19 in 20 that the 'true' value (which would have been obtained if the whole population had been interviewed) will fall within the range of plus or minus 6 percentage points from the sample result.

Strictly speaking, the tolerances shown here apply only to random samples; in practice good quality quota sampling has been found to be as accurate.

When results are compared between separate groups within a sample, different results may be obtained. The difference may be 'real', or it may occur by chance (because not everyone in the population has been interviewed). To test if the difference is a real one — i.e. if it is 'statistically significant', we again have to know the size of the samples, the percentage giving a certain answer and the degree of confidence chosen. If we assume the '95% confidence interval', the differences between the two sample results must be greater than the values given in the table below (which again assumes a 'pure' unbiased sample):

Size of samples compared	**Differences required for significance at or near these percentage levels**		
	10% or 90% ±	*30% or 70%* ±	*50%* ±
100 and 100	6	13	14
100 and 200	7	11	12
100 and 250	7	11	12
200 and 200	6	9	10
250 and 400	5	7	8
100 and 400	7	10	11
200 and 400	5	8	9
500 and 500	4	6	6

Resident response rate analysis

Responses based on sample drawn

Summary response	Total number n
Issued sample	**1,241**
Invalid addresses	**69**
Confirmed 2nd Home/ Holiday Home	14
Property vacant	9
Property derelict	10
Property demolished	11
Non-residential property	12
Property not found	13
Valid addresses	**1,172**
Non contact	**473**
Refusals	**149**
Refusals to head office (withdrawn)	**20**
Other	**58**
Too ill to participate	15
Away during fieldwork	16
Mother tongue required	17
Other	10
Successful interviews	**472**

Source: Ipsos MORI

Response rate based on sample issued

Total eligible sample	1,172
Total sample issued including re-issues	1,801
Total interviews achieved	472
Response rate	26%

Source: Ipsos MORI

Number of calls taken to achieve a successful interview

Number of calls	**% of total interviews**
Number of interviews achieved	n472
1	35%
2	33%
3	11%
4	11%
5	7%
6+	2%

Source: Ipsos MORI

Comparisons with the 1999 study

In order to give the findings some context we have made reference to the 1999 study conducted by Ipsos MORI on behalf of Coin Street Community Builders and South Bank Employers' Group. As noted in the introduction, the results are drawn from a more extended sample than that used in 1999 and using a quota methodology rather than a pre-selected random sample and are therefore not directly comparable, but may be used to explore indicative patterns.

In many cases the wording is identical, allowing for a more reliable comparison, however in some cases wording has changed to such an extent that it would be inappropriate to draw direct comparison even with the caveat of the slightly differing methodology. Those marked **in bold** have seen sufficient wording change between the two surveys to be treated with caution.

The table below gives the question wording for both years and the proportion for each year who are 'net satisfied'. The net satisfaction score is the proportion very or fairly satisfied, *less* the proportion that are very or fairly dissatisfied. So if 50% are very or fairly satisfied and 25% are very or fairly dissatisfied, the net satisfied figure will be +25.

To ensure the data is compared on a like-for-like basis between the two surveys *don't knows* have been **included** in the data set when calculating the net scores. Therefore scores between attributes will not necessarily be directly comparable due to differing volumes of don't knows (where appropriate the volume of don't knows has been taken into account in the main body of the report when reporting on the 2008/09 data).

Leisure and recreational facilities

When looking at those attributes with a consistent description across the two surveys, restaurants (+41) and outdoor sports/fitness facilities (+39) show the greatest increase in performance. All other leisure and recreational facilities reveal a positive level increase between the two surveys **with the exception of** swimming facilities, which still provoke high levels of dissatisfaction.

All of the following tables show data from the 1999 and 2008 **residents** surveys.

2008 wording	1999 wording	Difference 1999-2008	2008 net satisfied	1999 net satisfied
Shops	**Shops/stalls**	**+14**	**+28**	**+14**
Markets and stalls	n/a	n/a	+35	n/a
Bars and pubs	Bars and pubs	+23	+64	+41
Restaurants	Restaurants	+41	+78	+37
Outdoor sports/fitness facilities	Outdoor sports/fitness facilities	+39	+12	-27
Indoor sports/fitness facilities	Indoor sports/fitness facilities	+29	+15	-14
Swimming facilities	Swimming facilities	-4	-39	-35
Play facilities	N/A	n/a	+13	n/a
Parks and open spaces	**Parks**	**+48**	**+52**	**+4**
Facilities for creative arts, e.g. music rehearsal, crafts, arts workshops, etc.	n/a	n/a	+31	n/a
Libraries	**Library facilities**	**+16**	**+41**	**+25**
Facilities for community meetings	Facilities for community meetings	+25	+27	+2

Local environment

The majority of local environment attributes see a positive trajectory when comparing the current survey to the survey conducted in 1999, the greatest difference evident in air quality (+38) and public transport (+33). On-street parking still prompts high levels of dissatisfaction, with the net satisfaction score broadly on a par with 1999 (+4)

2008 wording	1999 wording	Difference 1999-2008	2008 net satisfied	1999 net satisfied
Levels of litter	**Litter control**	**+39**	**+46**	**+7**
Graffiti removal	n/a	n/a	+60	n/a
Numbers of rough sleepers	n/a	n/a	+22	n/a
Provision of public toilets	n/a	n/a	-38	n/a
Street lighting	Street lighting	+27	+71	+44
Maintenance of pavements	n/a	n/a	+37	n/a
Finding your way with street signs	**Directional signing**	**+25**	**+64**	**+39**
Personal safety	Personal safety	+22	+60	+38
Anti-social behaviour	n/a	n/a	+39	n/a
Air quality	Air quality	+38	+22	-16
On-street parking control	On-street parking control	+4	-3	-7
Levels of noise	n/a	n/a	+32	n/a
Public transport	Public transport	+33	+93	+60

Education facilities and services

Net satisfaction with each of primary (-2) and secondary (+1) schools is on a par with the 1999 survey.

2008 wording	1999 wording	Difference 1999-2008	2008 net satisfied	1999 net satisfied
Nursery education/childcare	**Nursery/childcare facilities**	**+15**	**+18**	**+3**
Primary schools	Primary schools	-2	+20	+22
Secondary schools	Secondary schools	+1	+9	+8
Adult education	n/a	n/a	+44	n/a
Out of school clubs and services for children aged 4-11	n/a	n/a	+11	n/a
Youth clubs and services for young people aged 12-18	n/a	n/a	+5	n/a

Health facilities and services

Health facilities and services were only explored in the 1999 survey at an overall level (net satisfaction with healthcare facilities = +56).

2008 wording	1999 wording	Difference 1999-2008	2008 net satisfied	1999 net satisfied
Services and care for the elderly	n/a	n/a	+13	n/a
Access to GPs	n/a	n/a	+70	n/a
NHS hospitals	n/a	n/a	+70	n/a
Access to an NHS dentist	n/a	n/a	+5	n/a
Mental health services	n/a	n/a	+10	n/a