

# London's Future



Is investment  
in infrastructure  
essential?

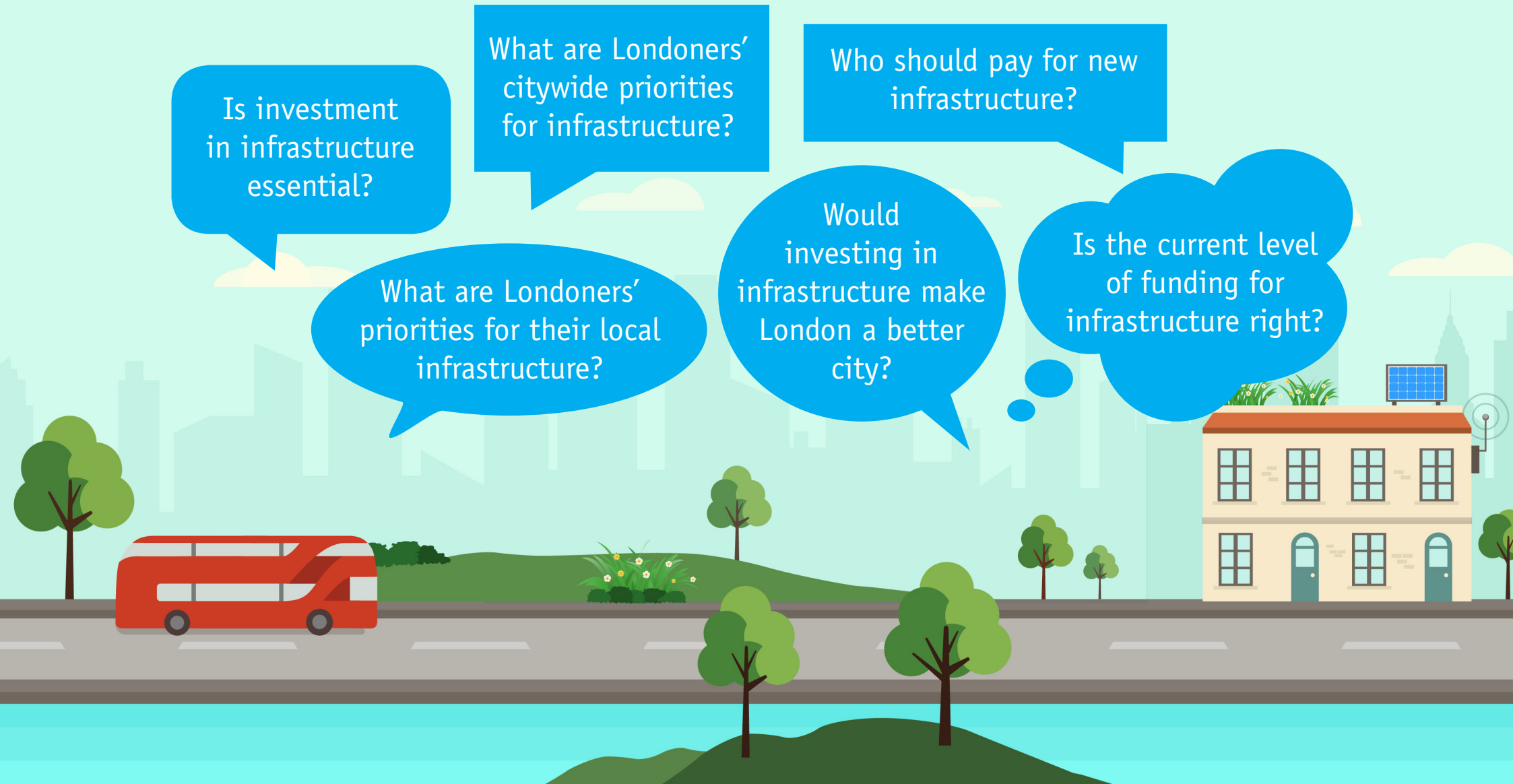
What are Londoners'  
citywide priorities  
for infrastructure?

Who should pay for new  
infrastructure?

What are Londoners'  
priorities for their local  
infrastructure?

Would  
investing in  
infrastructure make  
London a better  
city?

Is the current level  
of funding for  
infrastructure right?



# Foreword

**CLlr Claire Kober OBE**, London Councils' executive member for infrastructure and regeneration

London Councils represents the 32 boroughs and the City of London. We know that infrastructure is a major priority for Londoners, and vital to ensuring that the city keeps working and moving.

The research we have commissioned identifies that Londoners overwhelmingly believe that continuing to invest in infrastructure is essential for London. Londoners also believe investing in infrastructure can make London a better city.

The top priorities Londoners identify will not be a surprise; housing, health and education score highly. But we also wanted to understand how important the 'hidden' infrastructure is to Londoners – energy, flood defences, waste and digital connectivity.

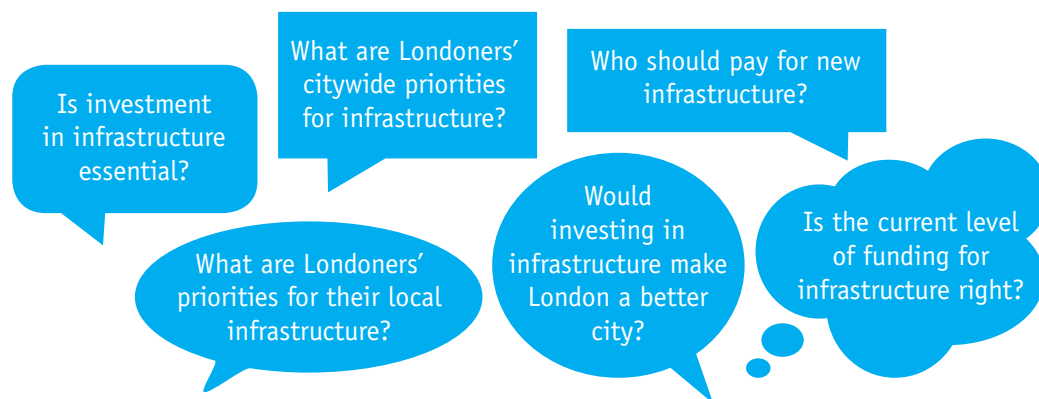
For example, 38 per cent of Londoners feel investment in renewable energy is too low. When it comes to digital connectivity, the highest priority is the rollout of superfast internet. Londoners want more investment in recycling and food waste processing facilities.

There is strong support by Londoners for central government to fund infrastructure investment. At London Councils we will continue to make the case to government to recognise the importance of infrastructure for a growing city, and that Londoners believe the government has a role to play.



# About the research

In September 2015 London Councils commissioned specialist infrastructure consultants Copper Consultancy to poll Londoners on infrastructure in their city.



Previous national polling by Copper Consultancy indicated that Londoners already have a good understanding of what infrastructure is. In our polling we asked about energy, housing, transport, digital, health, waste, education and flood defence infrastructure.

1,000 Londoners were interviewed who were representative of London's age, gender and ethnic profile. Information was also captured on housing tenure, employment status, social group and whether the person had any children.

In this analysis, ABC1 groups (people generally considered to be 'middle class') are categorised as people with higher incomes. People with lower incomes are those surveyed that are part of the C2DE social groups (people generally considered to be 'working class').

For ease of analysis, London was divided up into the five sub-regional transport areas (east, west, north, south and central) that TfL uses (see map).



We asked Londoners their views on a series of statements concerning the standard of infrastructure in London. Londoners were asked about levels of investment in a series of infrastructure, and how much of a priority investment in a certain infrastructure type, such as energy, was for both their local area and for London as a whole. The analysis in this report refers to local priorities and priorities for London as a whole. In the areas identified as a high or top priority, people were then asked which specific infrastructure they wanted prioritised for investment, for example if health was identified, those surveyed were asked about doctor's surgeries and hospitals. Londoners were also asked to identify their top three priorities for London as a whole.

# What is infrastructure?

Infrastructure creates places and connects them to each other. It boosts quality of life and makes places attractive for people to work, live and travel in.



**Transport** – so people can get to the shops, work, visit friends and get home again



**Commercial space** – businesses need offices, studios and shops to operate from



**Green spaces and leisure centres** – spaces to get fit, stay healthy and relax in



**'Green' infrastructure** – green roofs, rain gardens and green walls limit rain water running off buildings and pavements, reducing flooding



**Water** – vital for homes and businesses to drink, wash in and for food preparation



**Education** – children need nurseries, primary and secondary schools as well as colleges and alternative provision



**Waste and recycling facilities** – so the waste from homes and businesses can be made into something else or disposed of



**Energy** – homes and businesses need power



**Flood defences** – to protect London from surface water, tidal and river flooding



**Health facilities** – from doctors' surgeries to hospitals, people need health care when they are ill – and preferably can access advice and services to avoid becoming ill in the first place



**Sewerage** – waste water has to be treated



**Homes for people to live in** – large and small, to rent and buy, accessible and adapted, and for people on different budgets



**Digital connectivity** – businesses and residents need to be able to get online to work, shop, communicate with friends and apply for work

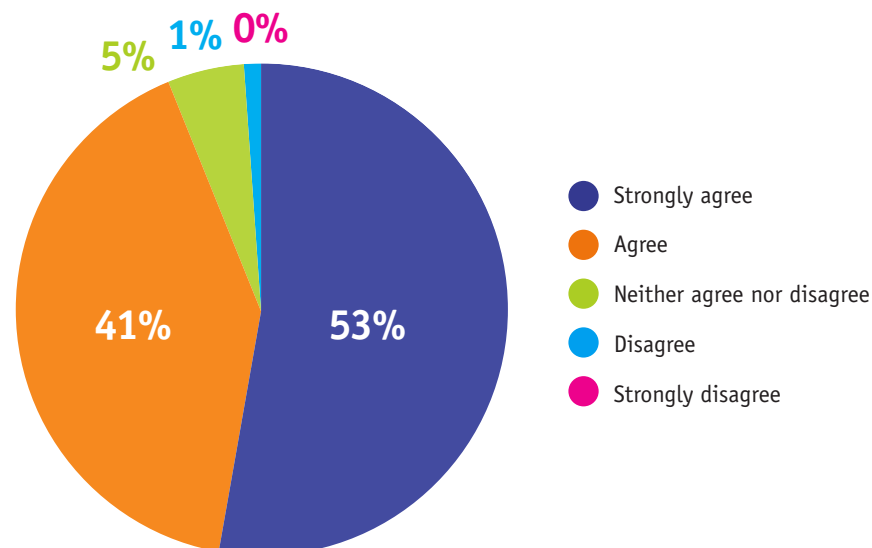


**Businesses** – having shops, supermarkets and places to meet friends and relax makes for thriving communities

# Londoners' views on the importance of infrastructure

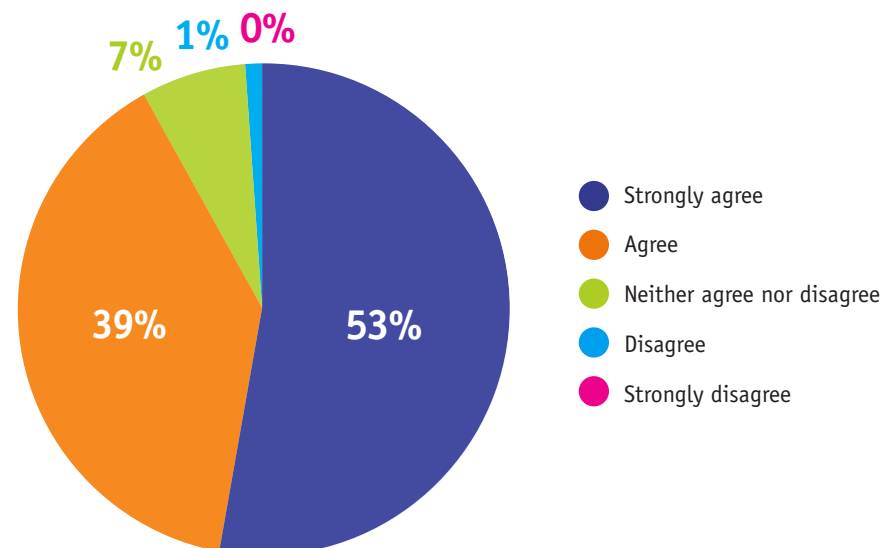
We asked Londoners a series of questions about whether infrastructure should be a priority for investment and whether it is important to a city like London.

**To what extent do you agree or disagree that continued investment in infrastructure is essential to a city like London?**



- People over 55 are more supportive of this statement than those under 34 (60 per cent of 55+ people surveyed strongly agreed, compared with 49 per cent of 18-34 year-olds).
- People who live alone feel most strongly about the need for continued investment (65 per cent strongly agreed compared to 53 per cent average).
- Strongest support for continued investment was in south London (64 per cent) and least in west London (41 per cent).
- The longer people spend in London, the more likely they are to strongly agree with this statement.

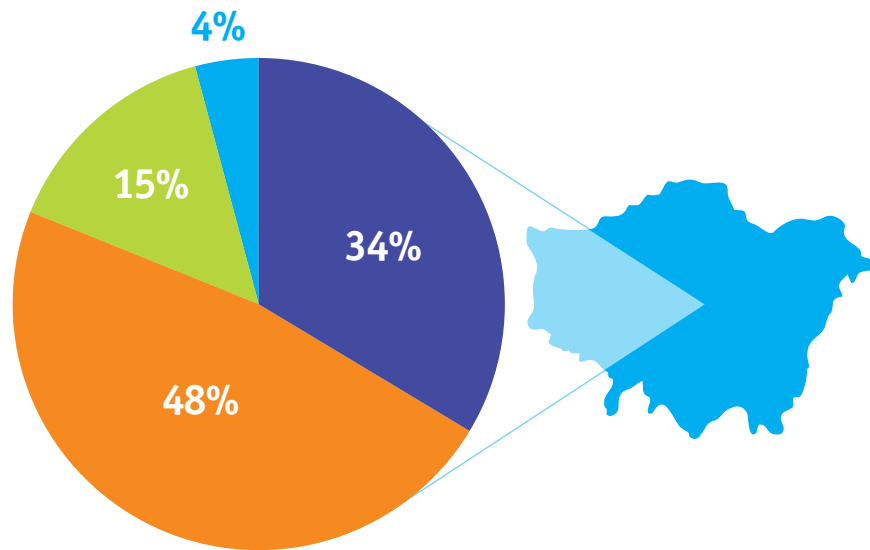
**To what extent do you agree or disagree that continued investment in infrastructure would make London a better city?**



- People with higher income were more supportive of this statement (57 per cent strongly agreed, compared to 45 per cent of people with lower incomes).
- Asian Londoners were more likely than people from all other ethnicities to strongly agree with this statement – 66 per cent compared with the 53 per cent London average.
- South Londoners are most likely to strongly agree with this statement (65 per cent, 27 per cent agree). But in north London 99 per cent of those surveyed either agreed or strongly agreed with this statement (compared to 92 per cent London average).

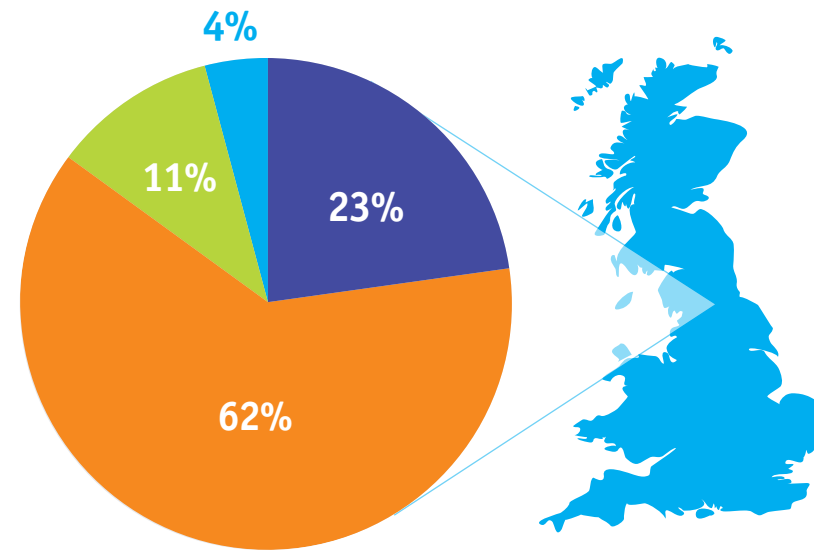
Which statement most closely matches your view?

## London



- We should be aiming for world class infrastructure, even if this involves a high level of investment
- We should be aiming for solid improvements to our infrastructure, even if this involves more investment
- We should be aiming for infrastructure that maintains the current standard, with lower levels of investment
- We should not be focusing on infrastructure at all at the current time

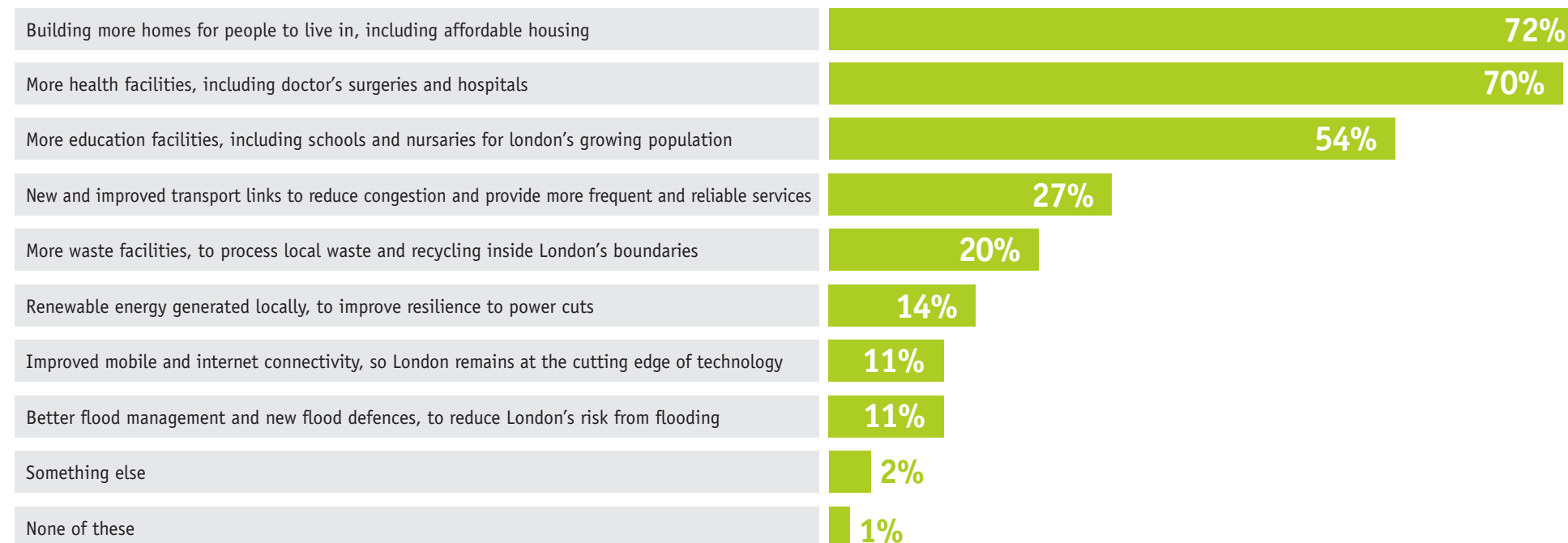
## UK



- Londoners are more supportive of world class infrastructure than the rest of the country (34 per cent compared to 23 per cent).
- Men are more likely to want world class infrastructure than women (37 per cent of men compared with 30 per cent of women).
- Over half of women (51 per cent) still want solid improvements to infrastructure.
- Asian and black Londoners are more likely to want world class infrastructure than white Londoners (43 per cent and 40 per cent compared with 30 per cent respectively).
- Geographically, south and north London are more supportive of world class infrastructure (41 per cent and 39 per cent compared with 28 per cent in west London).
- People who think that the private sector should pay for infrastructure are more likely to support solid improvements (56 per cent).

# Londoners' top priorities

We asked Londoners to select the three areas where they want investment in infrastructure to be prioritised for the city as a whole.



Londoners' top three priorities are clearly housing, health and education. This research supports much other research that indicates that London has a housing crisis, and Londoners want much more investment in housing.

Housing was selected by 82 per cent of those surveyed in north London (compared to 72 per cent London average) while education facilities were selected by 62 per cent of those surveyed in south London (compared to 54 per cent London average).

For homeowners, health is more of a priority than housing – with 74 per cent selecting health compared with 65 per cent for housing. Other notable findings include a fifth of people aged 18-24 selected mobile and internet connectivity as a top priority for London, while a fifth of respondents with lower incomes prioritised renewable energy to improve resilience to power cuts.

# Housing



## Key stats:

- Building more homes is the top priority for infrastructure spending for 72 per cent of Londoners.
- 73 per cent of Londoners feel the current level of investment in housing is too low.
- Building more homes in their local area is an important priority for 86 per cent of people.

## The detail

Our polling supports other research that London has a housing crisis. While all age groups believe the level of investment is too low, this is especially the case for the 35-44 age group, of whom 79 per cent think this. Unsurprisingly, people who have a secure housing situation (as they own their own home outright) are the least likely to think housing investment is too low – but nonetheless two-thirds of those surveyed still felt investment in housing was too low.

At a local level, people with lower incomes (64 per cent), living in flats (65 per cent) and renting their home (64 per cent) were more likely to consider housing a top priority compared to people with higher incomes (56 per cent) and homeowners (54 per cent). Black Londoners identified housing as a top priority

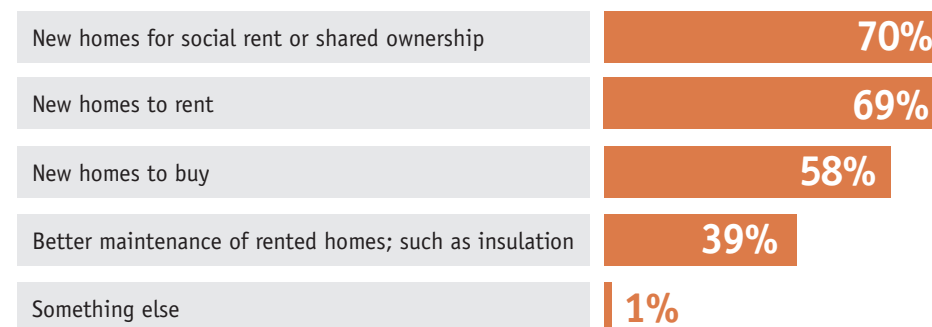
more than other ethnic groups (73 per cent compared to the London average of 59 per cent). Geographically, 70 per cent of people living in north London and 68 per cent of east Londoners said building new homes was a top priority in their area.

When it comes to London as a whole, 90 per cent of Londoners consider building more homes an important priority. This rises to 92 per cent of people aged 35-54. People living in inner London boroughs are slightly more likely to consider it an important priority (93 per cent) compared to people living in outer London boroughs (87 per cent).

## The solutions

The graph shows what Londoners want investment to be spent on; homes for social rent or shared ownership and homes to rent. Home ownership is a much lower priority.

Existing renters want to see more investment in homes to rent (70 per cent) than homes to buy (51 per cent); and Londoners in north London (82 per cent) and central and east London (both 76 per cent) particularly want investment in more homes for rent.





# Health



## Key stats:

- 61 per cent of Londoners feel the level of investment in health is too low.
- 84 per cent of people consider it a priority for both their local area and London as a city.
- It's the second highest priority for investment for Londoners overall and the highest area of priority for homeowners.

## The detail

Age is important when it comes to perceptions about current investment in health. The 55+ age group and 65+ age group are more likely to feel the level of investment is too low (68 per cent and 65 per cent) compared to the 18-24 age group (54 per cent). Likewise 74 per cent of people surveyed who are retired felt the level of investment is too low.

In their local area, 87 per cent of people felt health investment was an important priority. It was a top priority for over half of the people surveyed who were living in social rented housing (52 per cent) and more black and Asian Londoners considered it a top priority (55 per cent and 56 per cent) compared to white British Londoners (40 per cent). Over half of people living in central and east London (54 per cent and 51 per cent) considered investment in health a top priority for their local area.

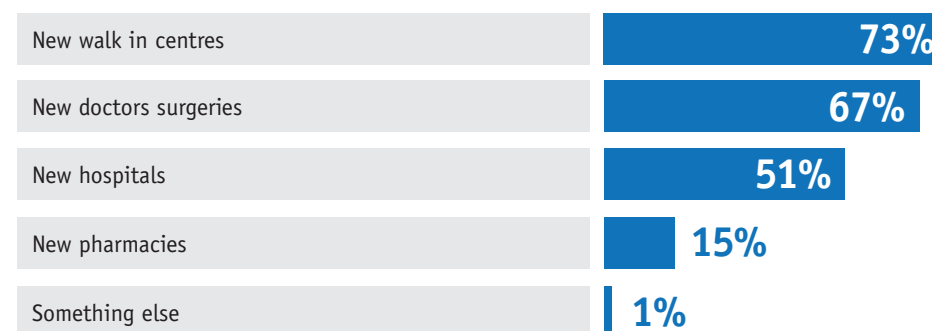
At a London-wide level, there were consistently high levels of support for health investment across all ages, employment statuses, gender, ethnicities and geographically.

## The solutions

The graph shows the areas where Londoners want to see investment prioritised. Walk-in centres were chosen by most respondents but this was highest among employed people (75 per cent) and homemakers (80 per cent). 87 per cent of north Londoners considered new walk-in centres to be a priority (compared to 73 per cent overall).

New doctors surgeries were the next most popular response and this was highest amongst students and retired people (73 per cent of each group selected this compared to 67 per cent overall).

Asian Londoners were most supportive of new hospitals (66 per cent selected this compared to 51 per cent overall). Support for new doctor's surgeries is strongest in inner London (76 per cent compared to 67 per cent overall) and in south London almost a quarter of respondents (23 per cent) identified new pharmacies as a priority for investment, compared to just 15 per cent of Londoners overall.



# Education



## Key stats:

- 54 per cent of Londoners consider education infrastructure to be in the top three priorities for investment in London.
- 48 per cent of Londoners feel the level of investment in education infrastructure is too little.
- Over two-thirds of those surveyed selected primary and secondary schools for investment.

## The detail

The longer people live in London, the more likely they are to feel the level of investment in education is too low. 53 per cent of people living in London for over 20 years felt the level was too low compared to just 19 per cent of people living in London for less than a year.

At a local level, people aged 35-54 are most likely to consider education to be a top priority for investment in their area, and 6 per cent more women than men said this. 44 per cent of people living in social rented housing considered it a

top priority. There are strong geographical differences – 51 per cent of Londoners living in central London felt it was a priority for their local area compared to only 24 per cent of respondents living in west London.

As a citywide priority, half of Asian and black Londoners considered education to be a top priority for investment compared with 38 per cent of white British Londoners. 79 per cent of people who considered schools a top priority for their local area also consider it a priority for London as a whole.

## The solutions

The graph shows where Londoners want investment in education infrastructure to be focused. There is slightly more support for secondary schools, which is consistent with London Councils' analysis that by 2020 there will be most pressure on London's secondary schools<sup>1</sup>.

Strongest support comes from the 35-44 (72 per cent) and the 45-54 (77 per cent) age groups; people who are likely to be parents. All age groups expressed similar levels of support for primary schools (67-69 per cent), whereas people aged 25-44 wanted more investment in nurseries and pre-schools (over 60 per cent).

More people renting their homes wanted investment in new nurseries and pre-schools (63 per cent) compared to people owning their own home (50 per cent). Geographically, 68 per cent of people living in inner London wanted investment in new primary schools whilst 80 per cent of people living in north London selected secondary schools.



# Transport



## Key stats:

- 61 per cent of Londoners think the level of investment in transport is about right.
- More frequent buses are the top area for investment selected by 48 per cent of Londoners.

## The detail

A majority of Londoners feel the level of investment in transport infrastructure is about right, perhaps reflecting TfL's well-advertised modernisation programme. Even amongst those who feel investment is essential for a city like London, and that continued investment will make London a better city, 66 per cent of people said that transport has an appropriate level of investment. However a significant proportion of north Londoners surveyed (39 per cent) felt the level of investment in transport was too low.

70 per cent of people living in central London and 73 per cent of people living in east London felt transport investment was an important priority for their local area. This compares to 52 per cent of people living in west London and 48 per cent of people living in south London. This is a real surprise as south London is usually considered to have poor transport links compared with other parts of London.

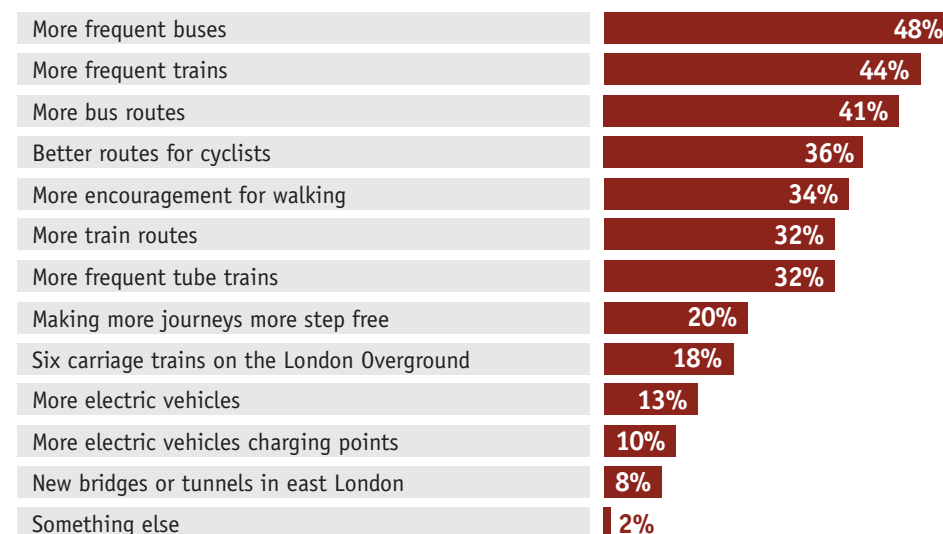
London-wide, 72 per cent of students consider transport to be an important priority, followed by 68 per cent of employed people. Again, central Londoners considered it an important priority (82 per cent) and over 70 per cent of black Londoners considered transport investment to be a priority for both their local area and across London.

## The solutions

The graph shows that more buses and trains, and improvements for walking and cycling are the top transport areas for investment Londoners' prioritised. 63 per cent of people with lower incomes prioritised buses, both increased frequencies and more bus routes. More frequent buses were also prioritised by 55 per cent of people renting their home, and 62 per cent of people who rent their home from a social landlord.

White British Londoners were more likely to prioritise better routes for cyclists (40 per cent) and more encouragement for walking (37 per cent) than people of other ethnicities.

North Londoners prioritised more routes and higher frequencies of trains and buses, as well as more frequent tube trains (59 per cent selected this). 45 per cent of people in south London selected more bus routes and whilst prioritisation of six carriage Overground trains was low overall, over a quarter of respondents in east London selected this. Interestingly, there was more support in south London for tunnels in east London, than in east London.



# Renewable energy



## Key stats:

- 38 per cent of Londoners feel investment in renewable energy is too low.
- 43 per cent of people aged 18-34 consider it to be a high priority for investment.
- Over three-quarters of people felt solar panels should be a priority for investment.

## The detail

Students (49 per cent), those with higher incomes (46 per cent) and people living in central London (52 per cent) were most likely to feel the level of investment in renewable energy is too low. Amongst Londoners who felt the public sector should pay for infrastructure, 66 per cent felt the level of investment in renewable energy was too low, coming second after housing.

In their local area, 43 per cent of 18-34 year-olds said renewable energy should be an investment priority compared to 32 per cent of people aged 55+. Employed people and students also considered it a priority (38 per cent and 40 per cent respectively), as did over a quarter of people living in flats, rising to 34 per cent for people living in converted flats. Of those who said infrastructure should be paid for by higher taxes or transport fares, 73 per cent considered renewable energy to be an important priority.

As to whether renewable energy is a London-wide priority, Londoners surveyed roughly split into thirds (top, high or less important priority). 35 per cent of people who were unemployed said it was a top priority, as did 71 per cent of black Londoners. Renewable energy was considered an important priority most by people surveyed who lived in central London (80 per cent) and east London (65 per cent), with only 40 per cent of respondents living in west London saying the same. 71 per cent of people who considered renewable energy a top priority for their local area also consider it a priority London-wide.

## The solutions

The graph shows that 76 per cent of Londoners want solar panels prioritised for investment. This is followed by energy from waste plants with 58 per cent of Londoners selecting this, rising to 85 per cent of those with higher incomes.

Londoners aged 25-34 are significantly more likely to prioritise wind turbines (63 per cent) compared with those aged 55+ (36 per cent). Support is also higher in inner London boroughs (86 per cent) than outer London boroughs (68 per cent).

More solar panels	76%
Greater use of energy captured when waste is burnt	58%
More wind turbines	47%
More use of heat from the ground (ground source heat pumps)	41%

# Waste



## Key stats:

- 56 per cent of Londoners felt investment in waste infrastructure was about right.
- Yet 60 per cent said it was an important priority for investment.
- New facilities to process recycling were the top area for investment (63 per cent), closely followed by facilities to compost food waste (59 per cent).

## The detail

56 per cent of Londoners surveyed felt the level of investment in waste processing facilities was about right. Of the 29 per cent who felt investment was too low, people with lower incomes were more likely to say this (34 per cent) compared to people with higher incomes (26 per cent).

The priority Londoners give to investment in waste infrastructure is similar at local and citywide level. In their local area, almost two-thirds (65 per cent) of Londoners aged 18-34 considered it an important priority compared with 55 per cent of those aged 65+. This rises to 70 per cent of Londoners aged 18-34 considering it a citywide priority. 71 per cent of students said waste infrastructure was an important priority for their local area, increasing to 77 per cent who considered it important

citywide. These findings are positive as young people and students are often considered hardest to encourage to recycle.

Investment in waste infrastructure is a higher priority for people living in flats (63 per cent selected this) and people renting their home (63 per cent) compared to people living in semi-detached or detached houses (55 per cent) and homeowners (57 per cent). This is interesting as recycling statistics show that people who own their own home are more likely to recycle.

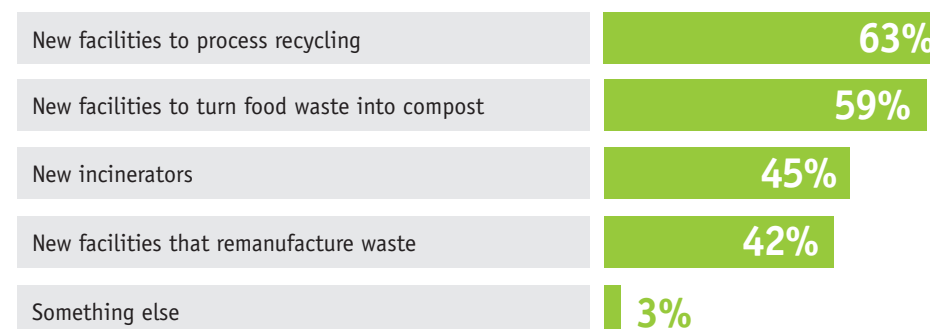
As a local priority, more black (67 per cent) and Asian Londoners (70 per cent) identify it as a top or high priority compared with 54 per cent of white British Londoners.

## The solutions

The graph shows that Londoners' top priorities for investment in waste infrastructure are facilities to process recycling and food waste. Men are more supportive of new recycling processing facilities than women (70 per cent of men compared to 57 per cent of women).

Londoners over the age of 65 are generally more supportive of incinerators than those aged 18-34 (61 per cent of 65+ selected incinerators for investment compared to 41 per cent of 18-34 year-olds).

65 per cent of people living in flats selected more facilities to compost food waste. This is positive given that flats are considered the most difficult housing stock to introduce food waste collections into.



# Mobile and internet connectivity



## Key stats:

- 40 per cent of Londoners surveyed in north London felt the level of investment in digital connectivity in London was too low.
- Younger people and people living in flats were more likely to consider it an important priority.
- Three quarters of women compared to half of men identified better internet connections as an area for prioritisation.

## The detail

Over half of people surveyed (53 per cent) across all age groups felt the level of investment was about right, with a quarter considering it too low. 12 per cent of people surveyed felt the level of investment in mobile connectivity was too high – the highest for any of the areas we asked about.

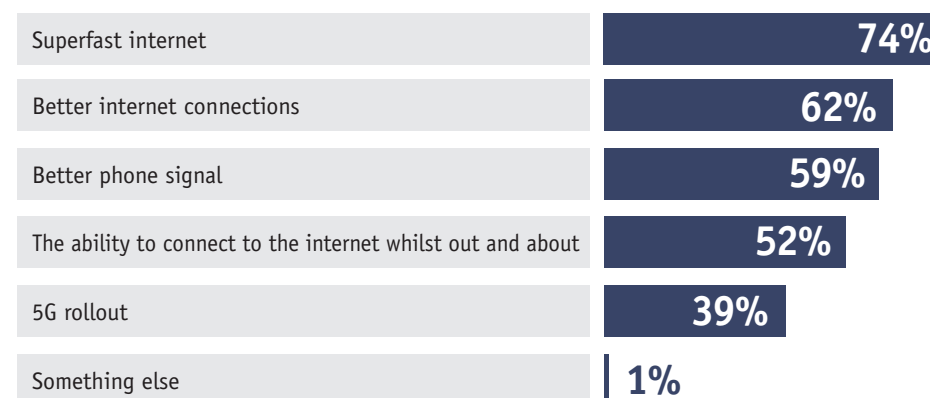
40 per cent of people living in north London felt the level of investment was too low whilst 62 per cent of people living in east London felt the level of investment was about right.

Just over a third of people under 55 consider digital connectivity to be a high priority compared to under a fifth of people aged over 55. Over a third of people who are retired do not consider it a priority at all. Digital connectivity is a slightly higher priority for people who are unemployed than those who are employed. The same is true for people on lower incomes (57 per cent said it was an important priority) compared to those with higher incomes (45 per cent). Likewise it's more important to people living in flats (57 per cent) and renting (55 per cent) than homeowners (42 per cent). 61 per cent of north Londoners considered digital connectivity to be a local and London-wide priority for them.

## The solutions

The rollout of superfast internet is the highest priority for investment for Londoners. This is consistent across all age groups, with 90 per cent of people with higher incomes prioritising it.

Better internet connections are the next priority for Londoners with 75 per cent of women identifying this compared to 51 per cent of men. In all the other options, men and women were largely equal in their preferences.



# Flooding



## Key stats:

- 47 per cent of Londoners said the level of investment in flooding infrastructure was about right.
- 73 per cent believe the priority should be maintaining existing defences.

## The detail

People surveyed generally feel the level of investment is about right. This was strongest in north London where 58 per cent of those surveyed said this. This should be a concern for public authorities with responsibility for flooding, as London is a national flood risk area. This reflects that more could be done to educate people about the risks of flooding in London.

As a priority for their local area, over half of students considered it to be important (54 per cent) with homemakers least likely to consider it important. When asked about both their local area and the city, people living in flats and renting their home consistently gave it higher priority compared to homeowners. These results are unexpected as many flats are multi-layer, meaning people living above the ground floor would not expect to flood. It may reflect the more vulnerable housing situation of renters, who perceive a reliance on their landlord to protect the property from flooding.

People living in central London (76 per cent) and east London (64 per cent) were most likely to consider flooding infrastructure an important priority for the city.

78 per cent of people who considered flooding a top priority for their local area also consider it a priority for London, meaning Londoners recognise that flooding does not respect local boundaries.

## The solutions

Londoners indicate higher levels of support for maintaining London's existing flood defences over building new ones. This is particularly the case in inner London (87 per cent) but less so in outer London (58 per cent). This is challenging for public bodies as much of the funding secured from central government is for building new flood defences, and funding for maintaining existing defences is more uncertain. 39 per cent of respondents supported promoting green infrastructure (green roofs and walls, rain gardens). In south London, 75 per cent of respondents selected this, suggesting a good starting point for increasing the uptake of these schemes.

Maintaining flood defences that have already been built

73%

Building new flood defences

56%

Growing plants and grass on roofs and walls to help prevent flooding and encourage nature

39%



# Funding infrastructure

We asked Londoners how they thought the new infrastructure London needs should be paid for.

**When able to select multiple options,** 79 per cent of Londoners felt central government should fund infrastructure – rising to 83 per cent of 35-54 year-olds and 83 per cent of respondents with lower incomes. Of those who strongly agreed that continued investment is essential for London, 81 per cent felt infrastructure should be funded by central government and 34 per cent felt public organisations should pay. Even amongst those who disagreed that continued investment in infrastructure would make London a better city, 75 per cent felt infrastructure should be funded by central government. Of those surveyed who did not think that infrastructure should be a focus at the current time, 91 per cent felt that central government should pay for infrastructure.

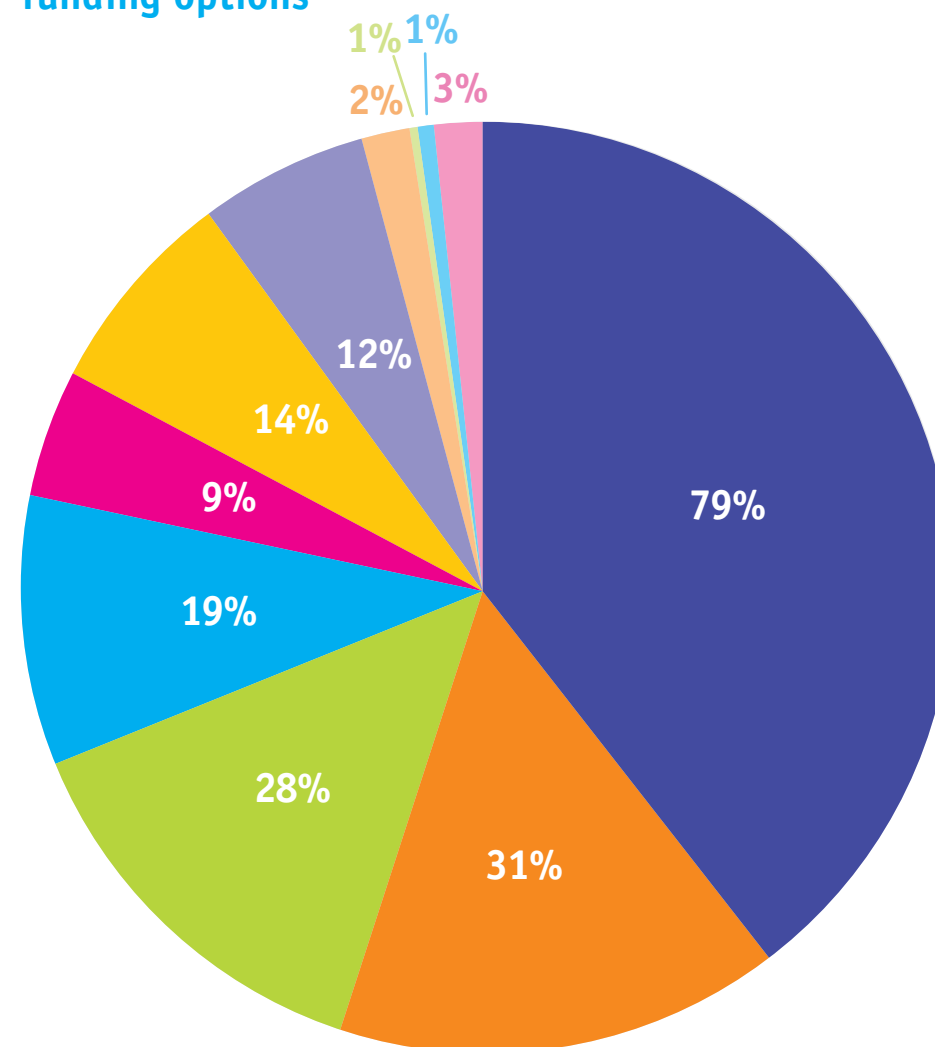
The sub-region most supportive of the public sector funding infrastructure investment was north London, where 39 per cent of respondents selected organisations such as the Mayor, TfL, councils and the Environment Agency and 85 per cent felt central government should pay for infrastructure.

Whilst increases in transport fares were universally unpopular, 7 per cent of people who were unemployed selected it – compared to only 3 per cent of people in work.

People with higher incomes were most supportive of developers paying for infrastructure (37 per cent selected this) with 27 per cent wanting to see companies or pension funds pay for new infrastructure. Of the people who wanted the private sector to pay for infrastructure, 80 per cent selected developers.

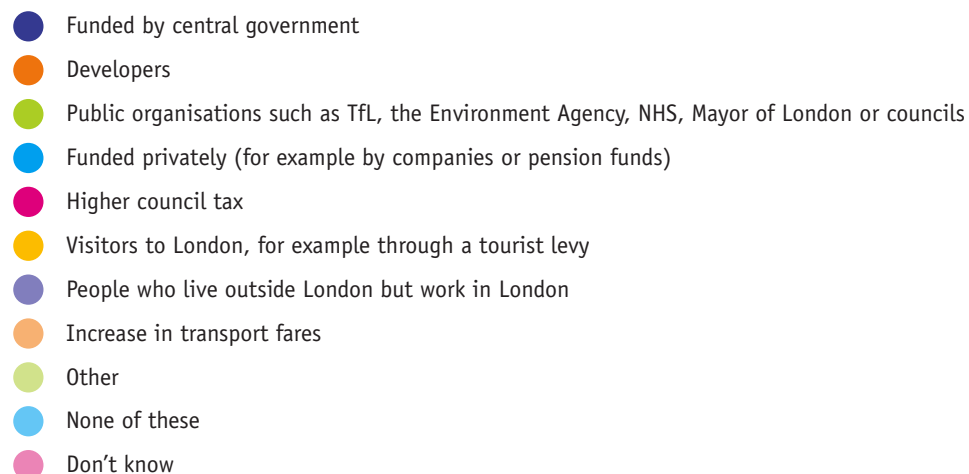


**Responses when able to select multiple funding options**

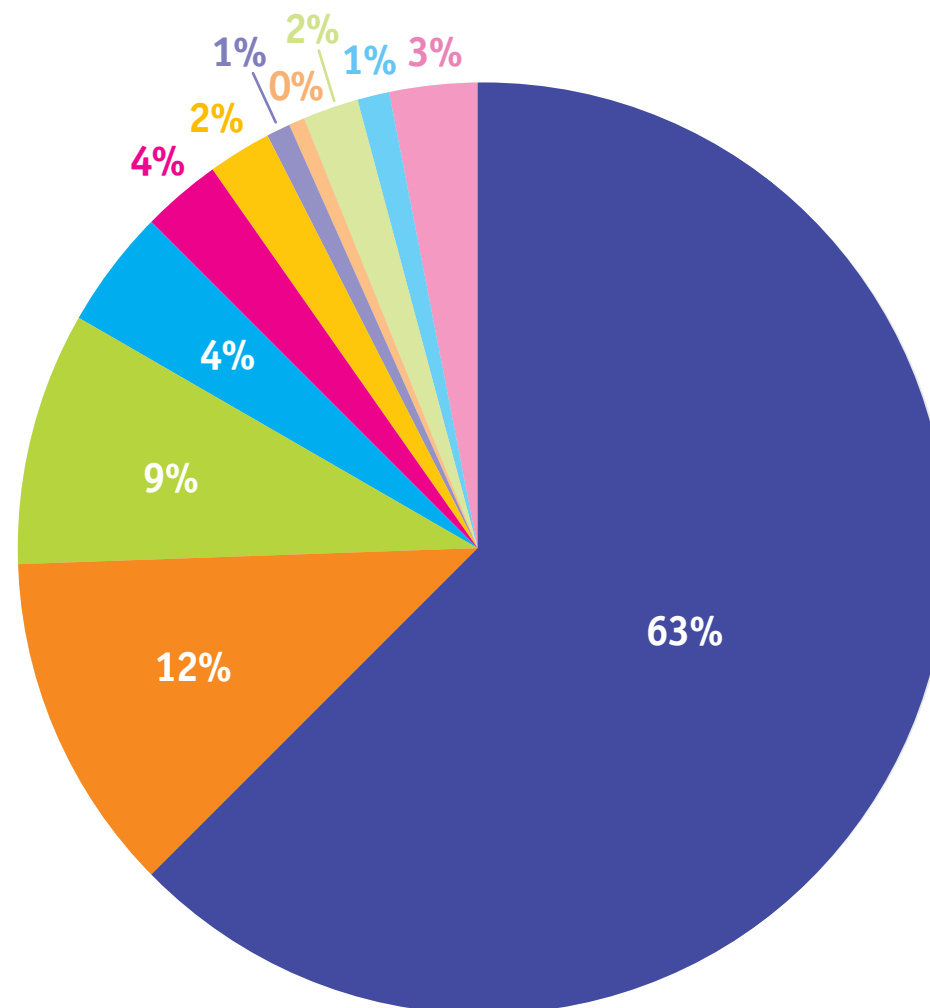




**When asked for their top preference of how infrastructure should be funded,** people aged 35-54 were most supportive of central government paying for infrastructure (68 per cent said this) compared to 60 per cent of 18-34 year-olds and 55+ year olds. People with higher incomes showed least support for central government paying for infrastructure (55 per cent) compared with people on lower incomes (70 per cent). People renting were more supportive of central government funding infrastructure (67 per cent) compared to 60 per cent of homeowners surveyed. Over two thirds of black Londoners (78 per cent) supported central government paying for infrastructure.



**Responses when asked for top preference**



London Councils represents all 32 London boroughs and the City of London. Our work on infrastructure focuses on strategic infrastructure projects such as Crossrail 2. We are exploring ways to fund the infrastructure London needs and lobby the Mayor of London, central government and the National Infrastructure Commission to deliver it. We continue to press for recognition that while London does need more homes, these homes must be built with infrastructure that creates communities – including schools, health facilities, shops and green spaces; and proper consideration given to waste and recycling, transport links, and digital connectivity. These new communities should be sustainable in all senses – including environmentally, by incorporating renewable energy and green infrastructure into the design.

Our infrastructure work can be viewed at:

**[www.londoncouncils.gov.uk/london-needs](http://www.londoncouncils.gov.uk/london-needs)**

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