FutureFocusResearch
Innovation and Insight

Budget Consultation 2018

Report

November 2018

Prepared For: **Stroud District Council**

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Contents

1. Approach to research

1.1 Research objectives

Stroud District Council (SDC) commissioned Future Focus Research to conduct a survey of local residents and businesses as part of the annual budget consultation process. The survey examined their views on SDC spending priorities, local priorities, suggestions for future strategies, and satisfaction levels with the Council's activities. We have also compared the findings on some questions as far back as 2010.

1.2 Methodology

The research consisted of 500 ten minute telephone interviews with local residents and 200 ten minute telephone interviews with local businesses.

For the resident survey, all interviews were conducted with a representative sample of residents aged 18 and over who live in a household where Council Tax is paid to Stroud District Council. The sample was based on the quota controls below, which reflect the demographic makeup of the Stroud District Council area. In addition, to ensure the views were obtained from individuals from all areas of the district, we targeted a proportionate number of interviews in each of the local areas, as follows:

- Gloucester Border Areas
- Stroud Central
- Stroud Border Areas, including Nailsworth
- Stonehouse
- Dursley
- Wotton-Under-Edge
- Berkeley

These areas are grouped together based on the Royal Mail post towns – see Appendix A for details of the postcodes. In addition to area, quotas were also set on age and gender as shown in table 1.1 below.

Table 1.1: Age and Gender quotas

Gender	
Male	49%
Female	51%
Total	**100%**
Age	
18 - 34	21%
35 – 54	37%
55 – 74	31%
75+	11%
Total	**100%**

For the business survey, quotas were set in terms of business size (based on number of employees) as follows:

- 140 interviews with businesses with less than 10 employees; and
- 60 interviews with businesses with 10 or more employees.

Both questionnaires were designed in conjunction with the Council to ensure the research was able to deliver the intended objectives. Interviews were conducted by a team of trained interviewers.

A sample size of 500 gives a margin of error of +/-4.4% at the 95% confidence interval. Therefore, if 50% of respondents give an answer to a question, we can be sure that the true value lies somewhere between 46.6% and 54.4%. A sample size of 200 gives a margin of error of +/-6.9% at the 95% confidence interval. Therefore, if 50% of respondents give an answer to a question, we can be sure that the true value lies somewhere between 43.1% and 56.9%.

Please note where charts do not add up to 100 this is due to one of two reasons:

- The question was a multiple choice and respondents may have given more than one answer
- Percentages have been rounded to the nearest whole percentage and therefore the total presented in the chart may sum to slightly more or less than 100%.

1.3 Who did we interview?

1.3.1 Resident Survey

The profile of the 500 interviews is shown in table 1.2 below.

Table 1.2

Area	**%**	**Number of respondents**
Gloucester Border Areas	16%	80
Stroud Central	26%	132
Stroud Border Areas	19%	95
Stonehouse	10%	49
Dursley	15%	77
Wotton-under-Edge	8%	38
Berkeley	6%	29
Gender		
Male	49%	245
Female	51%	255

Age		
18 – 34	21%	105
35 – 54	37%	185
55 – 74	31%	153
75+	11%	55
Prefer not to say	<1%	2
Disability		
Yes	6%	32
No	89%	444
Prefer not to say	5%	24
Working status		
Employed in Stroud district	31%	157
Employed outside Stroud district	15%	73
Unemployed and actively looking for paid employment	4%	22
Unemployed but not looking for paid employment	2%	12
Retired	34%	172
At school/college/university	5%	24
Other (e.g. house person, carer)	2%	12
Prefer not to say	6%	28
Ethnicity		
White or White British	94%	468
Other	6%	32
Total	**100**	**500**

Where there are differences between any of the demographics, these have been highlighted in the report.

1.3.2 Business Survey

The profile of the 200 interviews is shown in table 1.3 below.

Table 1.3

Business Sector	%	No. of responses
Retail and Wholesale	42	84
Manufacturing and Engineering	10	19
Professional Services	9	18
Hospitality and Leisure	8	16
Construction and Building Services	6	11
Business Services	5	10
Transport, storage and distribution	5	9
Health and Social Work	3	5
Publishing/Printing/Packaging	2	4
Personal Services	2	4
Agriculture and Fishing	2	4
Travel and Tourism	2	3
Education	2	4

Biotechnology medical/chemical	1	2
Creative Services and Media	1	2
Charity	.5	1
Financial services	.5	1
IT and Telecoms	.5	1
Energy/Water	.5	1
Other	1	2
Total	**100**	**200**

Number of employees	%	Number of responses
One	10	19
2 – 4	38	76
5 – 9	23	45
10 – 25	28	55
26 – 50	2	3
51 – 100	1	2
Total	**100**	**200**

Where there are differences between businesses of different sizes (less than 10 employees v 10 or more), these have been highlighted in the report, although caution should be taken due to the small sample size.

2. Summary

This section provides an overview of the findings of this survey:

2.1 Residents Survey

Satisfaction and priorities

- 96% are *satisfied with their local area as a place to live* (95% in 2017).
- 80% are *satisfied with the way SDC runs things* (79% in 2017).
- 79% agree that *services have been maintained to a good standard* (74% in 2017).
- 78% are satisfied that *SDC is working to improve the environment* (76% in 2017).
- 70% agree that they *get value for money from SDC* (72% in 2017).
- 66% agree that *SDC is business like and efficient* (66% in 2017).
- **Agreement with all statements have remained consistent with 2017**
- The services valued the most were *refuse collection* (76% high), *recycling* (71%), *street cleaning* (57%) and *pollution control* (54%).
- *Waste/recycling* (66%) was the service considered to be most in need of funding followed by *leisure centres/parks/open spaces* (36%)
- 87% rated *provide value for money and high quality services* as a very high/high priority (96% in 2017).
- 89% rated *help create a sustainable and vibrant economy that works for all* as a very high/high priority (92% in 2017).
- 85% rated *provide affordable, energy efficient homes for our diverse and changing population* as a very high/high priority (78% in 2017).
- 86% rated *minimise carbon footprint/adapt to climate change/recycle more* as a very high/high priority (83% in 2017).
- 73% rated *promote the health and wellbeing of our communities and deliver the public health agenda* as a very high/high priority (64% in 2017).
- **Most areas were considered to be the same or a higher priority than in 2017.**

Information from Stroud DC

- 72% think that SDC *acts upon the concerns of local residents* a great deal or a fair amount. This was similar to 2017 (74%).
- 80% think that SDC keeps residents very or fairly well informed (78% in 2017).

Council Tax

- Just 6% receive their Council Tax bill by email.
- 43% would not accept any level of increase in Council tax (50% in 2017), whilst 31% would accept a 2% increase, 19% would accept a 2.5% increase and 6% would accept a 3% increase or more.

Contact with SDC

- 12% had either contacted the Council or had found out information about the Council recently (8% in 2017). The main method was by phone (75%). Just 5% used the website.

- When asked why they didn't consider using the website, the main reason was that *phoning was quicker* (67%).
- When asked how they would make contact with the Council if they needed to, most said they would do so by phone (74%).

2.2 Business Survey

Satisfaction and priorities

- 94% are *satisfied with their local areas as a place to do business* (94% in 2017).
- 78% are *satisfied that SDC is working to improve the environment* (85% in 2017).
- 73% agree that *services have been maintained to a good standard* (72% in 2017).
- 68% are satisfied with the way SDC runs things (70% in 2017).
- 62% agree that they *get value for money from SDC* (64% in 2017).
- 60% agree that *SDC is business like and efficient* (62% in 2017).
- **Agreement with all statements are consistent with 2017.**
- 96% rated *provide value for money and high quality services* as a very high/high priority (96% in 2017).
- 88% rated *help create a sustainable and vibrant economy that works for all* as a very high priority (89% in 2017)
- 85% rated *provide affordable and decent housing* as a very high/high priority (89% in 2017).
- 94% rated *promote the health and wellbeing of our communities and deliver the public health agenda* as a very high/high priority (88% in 2017).
- 90% rated *minimise carbon footprint/adapt to climate change/recycle more* as a very high/high priority (81% in 2017).
- **For all areas, the level of priority in 2018 either increased or remained consistent with 2017.**
- *Transport and parking* (63%) & *waste and recycling (50%)* were considered the most important services to businesses.

Support for businesses

- 22% said that the EU Referendum decision has made them somewhat uncertain about their future business plans (27% in 2017), 74% said it would make no difference.
- The main reason for uncertainty was *retail confidence* (36%) and cost of raw materials (36%).

Information from Stroud DC

- 69% said they are very well/fairly well informed about services and benefits the Council provides (69% in 2017).

Contact with Council

- 8% had recently contacted the Council (16% in 2017).
- The main method of contact was by phone (63%), then email (44%).
- 19% used the Councils new website (3 people).
- All but one of those using the website managed to do what they needed (base:3).

- The main reason given for not using the website was that *phoning is quicker.*
- Just 11% said that they receive their business rate bill by email (13% in 2017)
- Many of those who don’t currently receive their bill by email had no specific reason as to why (77%) while 19% said that they preferred paper bills.

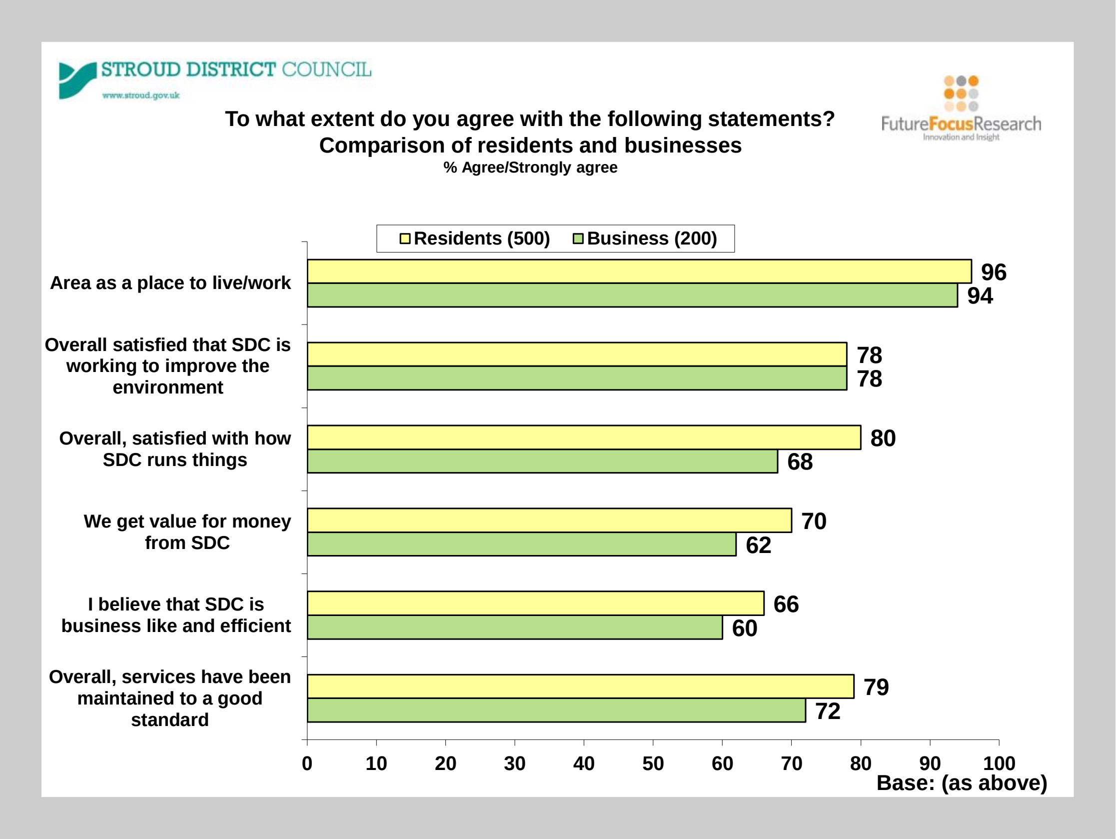
3. Residents v Businesses

3.1 Opinions of Stroud DC

Whilst residents and businesses were consistently happy with *their area as a place to live and work*, opinions differed with regards to other aspects of the Council.

Residents were more likely to agree that they are *satisfied with the way Stroud DC runs things* (80% compared to 68% of businesses) and that *we get value for money from SDC* (70% compared to 62% of businesses). See figure 3.1.

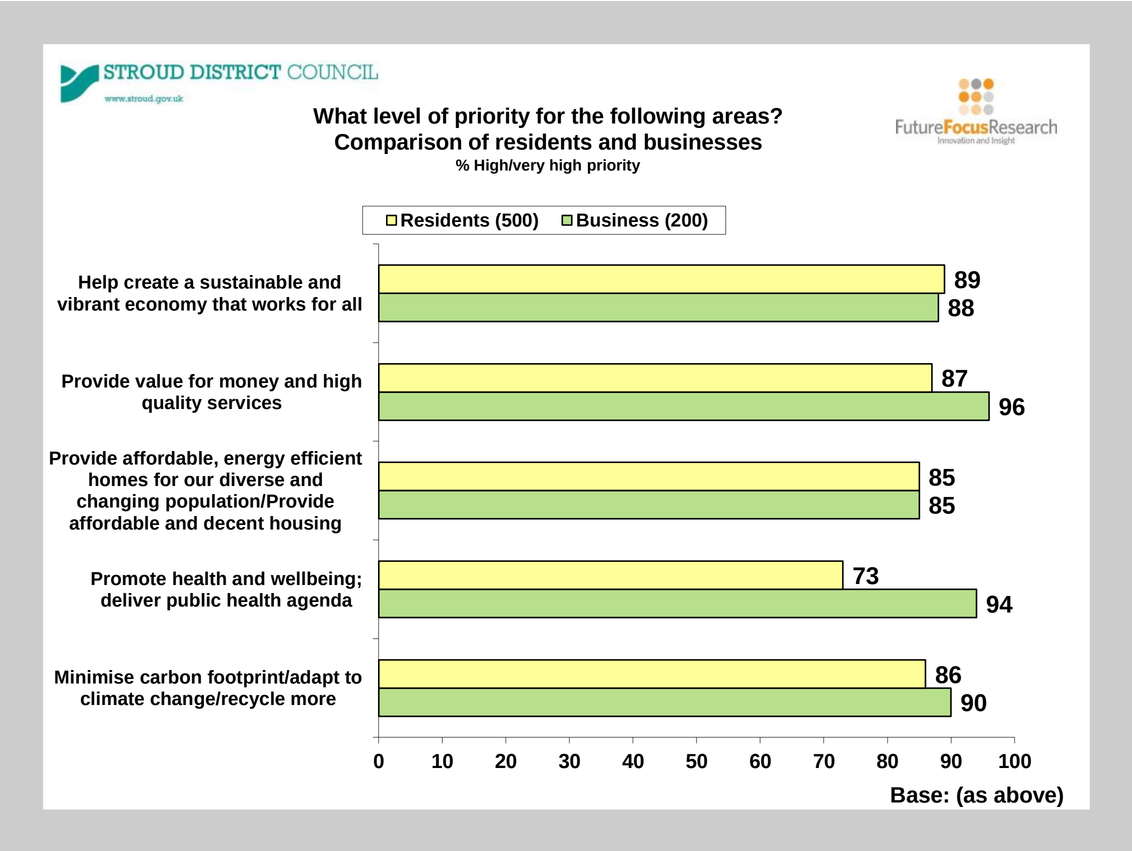
Figure 3.1



3.2 Corporate Delivery Plan

There is a great amount of consistency between residents and businesses in the level of priority given to each element of the Corporate Delivery Plan, with the exception of *promote health and wellbeing: deliver public health agenda* where businesses were much more likely to rate this as a high priority (94% compared to 73% of residents) and *provide value for money and high quality services* (96% compared to 87% of residents) See figure 3.2.

Figure 3.2



4. Resident Survey

This section details the views and opinions from the resident survey, covering:

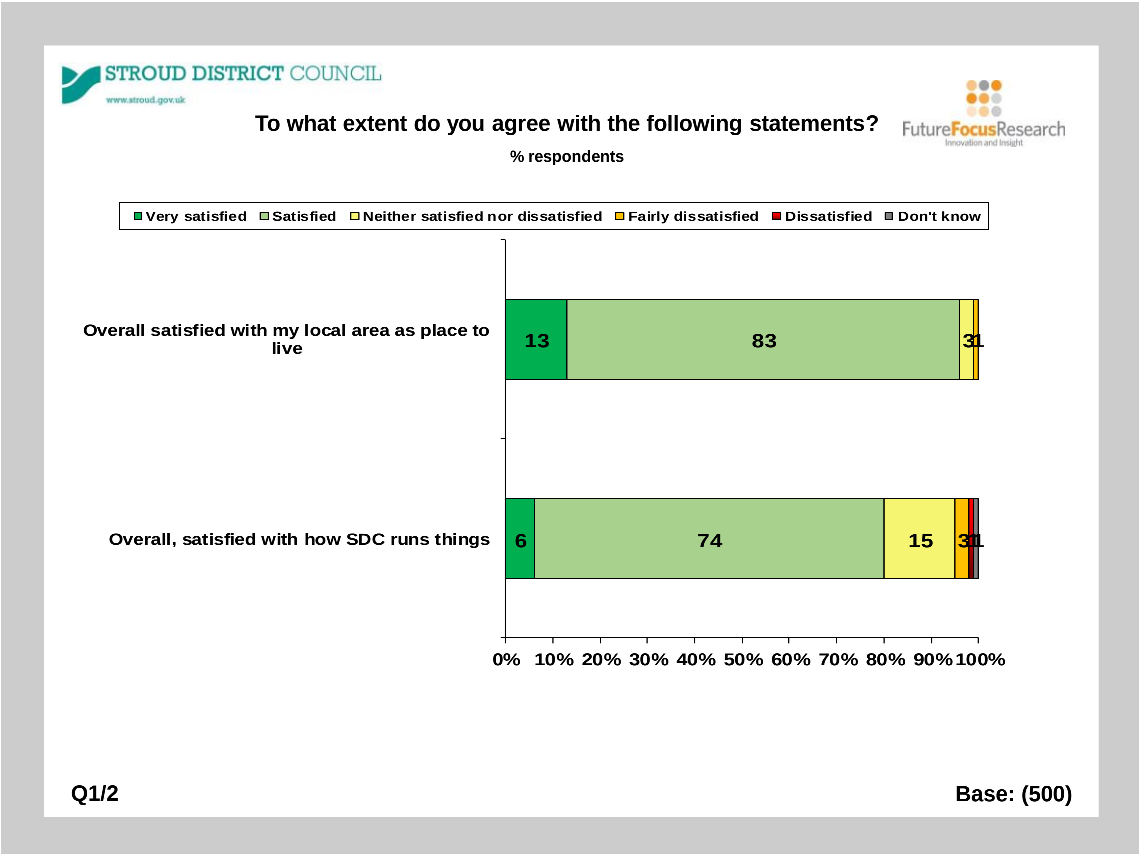
- Satisfaction and Priorities
- Information from Stroud District Council
- Council Tax
- Contact with Stroud District Council

4.1 Satisfaction and Priorities

The vast majority of respondents were *happy with their area as a place to live* (96% *very satisfied* or *satisfied*). See figure 4.1. There was no difference in satisfaction between age groups.

Residents were asked how satisfied they were *with the way Stroud DC runs things* 8 in 10 residents (80%) said they were either *very satisfied* or *satisfied*. There were differences by age, with younger residents (18-24s) being least satisfied (58% compared to 85% of 35-54s, 88% of 55-74s and 82% of those 75+).

Figure 4.1



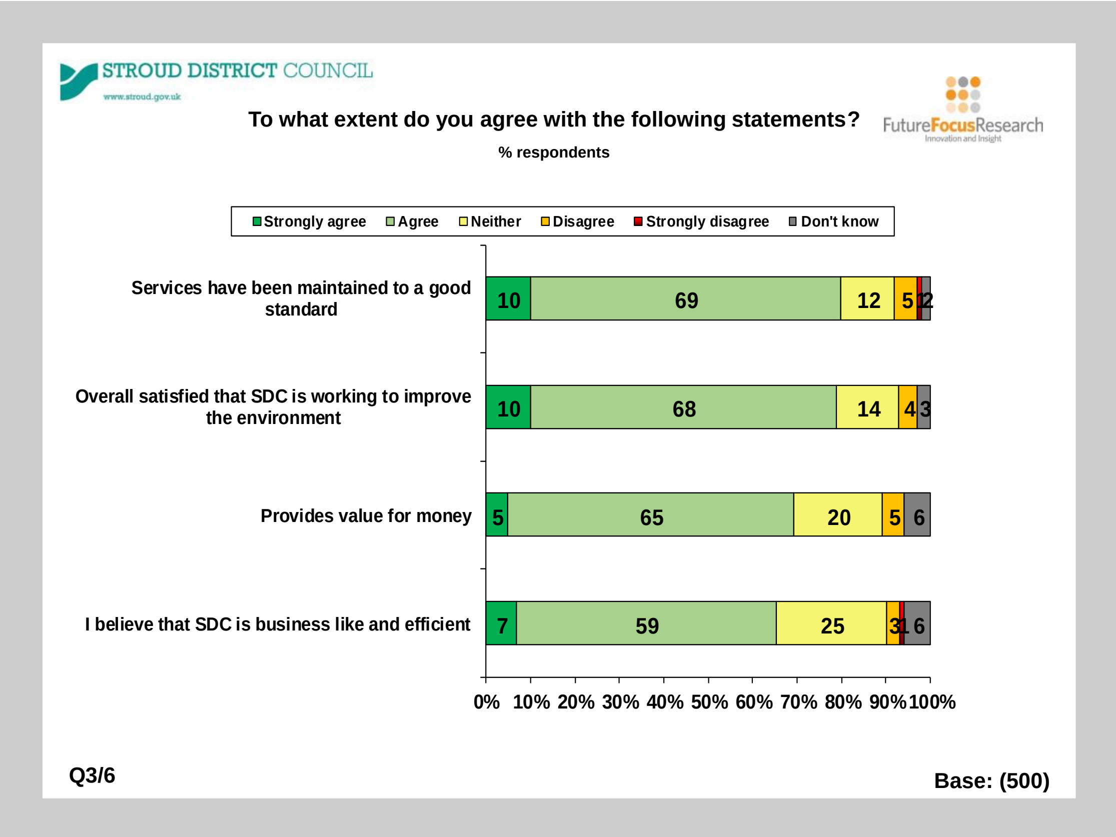
Residents were then asked to what extent they agreed with a range of statements (see figure 4.2 which is ranked in order of agreement).

Almost 8 in 10 agreed (either strongly agree/agree) that *services have been maintained to a good standard (79%)* and that *Stroud DC is working to improve the environment* (78%)

Seven in 10 (70%) agreed that *Stroud DC provides value for money*. The statement with the lowest percentage agreement was *Stroud DC is business like and efficient* (66%).

Those aged 18 – 34 were less likely to agree that *Stroud DC provides value for money* (49%) whilst those aged 56 – 75 were most likely to agree (86%).

Figure 4.2



Comparing the 2018 findings with previous years, results were consistent with 2017, with most seeing the highest level of satisfaction to date. See figure 4.3 and 4.4.

Figure 4.3

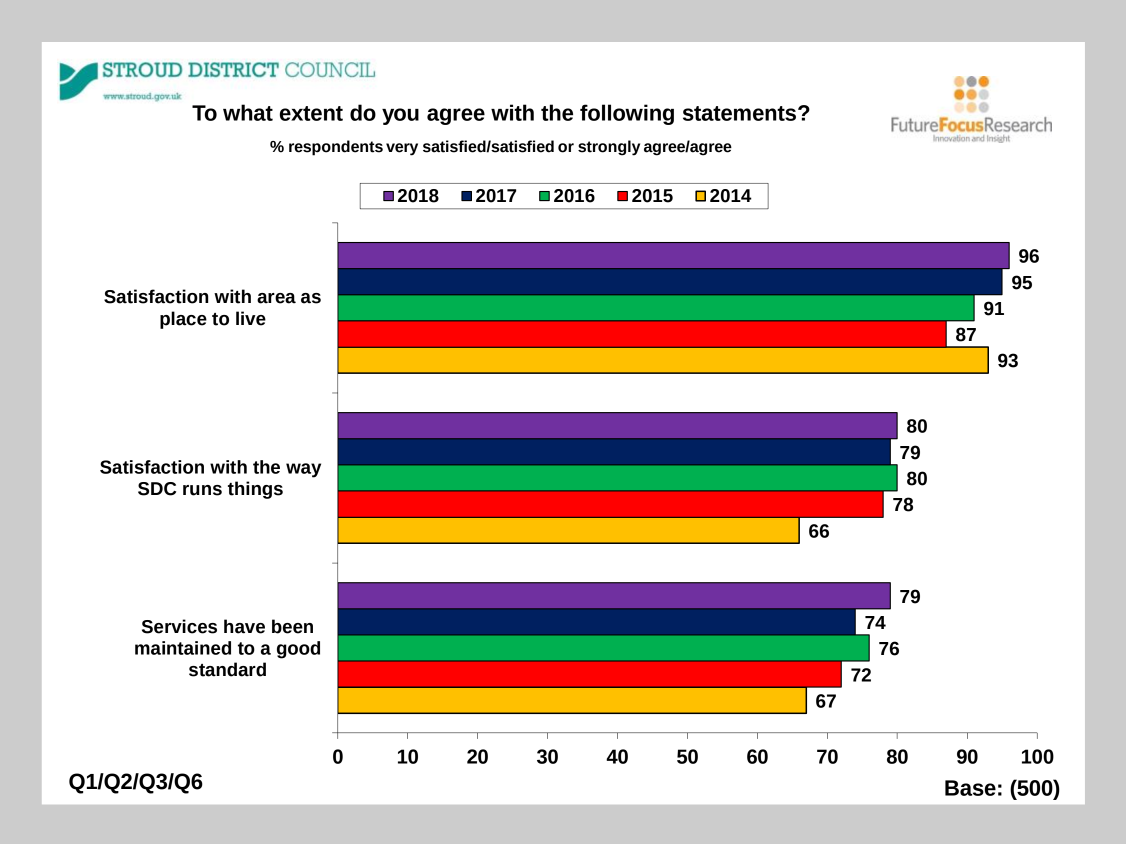
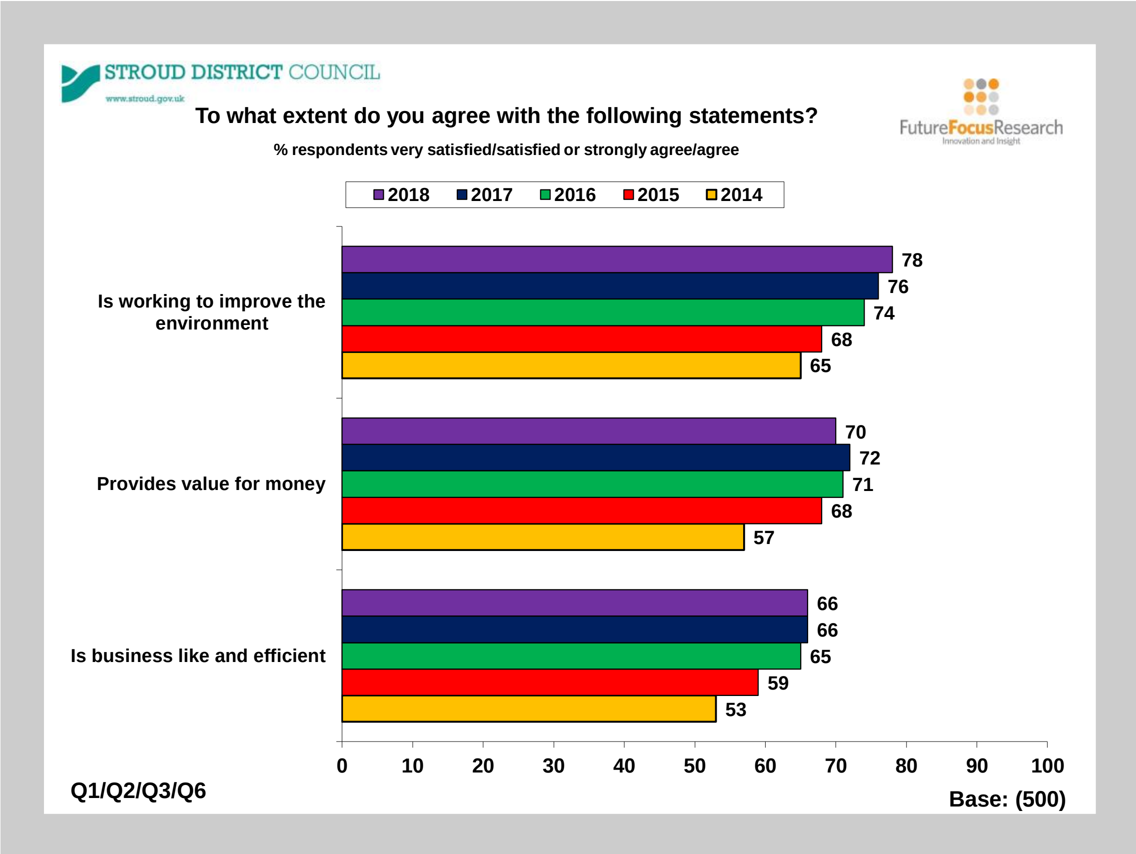


Figure 4.4



Residents were asked to what extent they valued a list of services. The most valued services were *refuse collection* (76% high), *recycling* (71% high), *street cleaning* (57% high) and *pollution control (54*% high). The least valued services were *dog wardens and animal welfare* (13%) *and neighbourhood wardens* (13%) *and museums in the park* (16%) See figures 4.5 and 4.6.

Figure 4.5

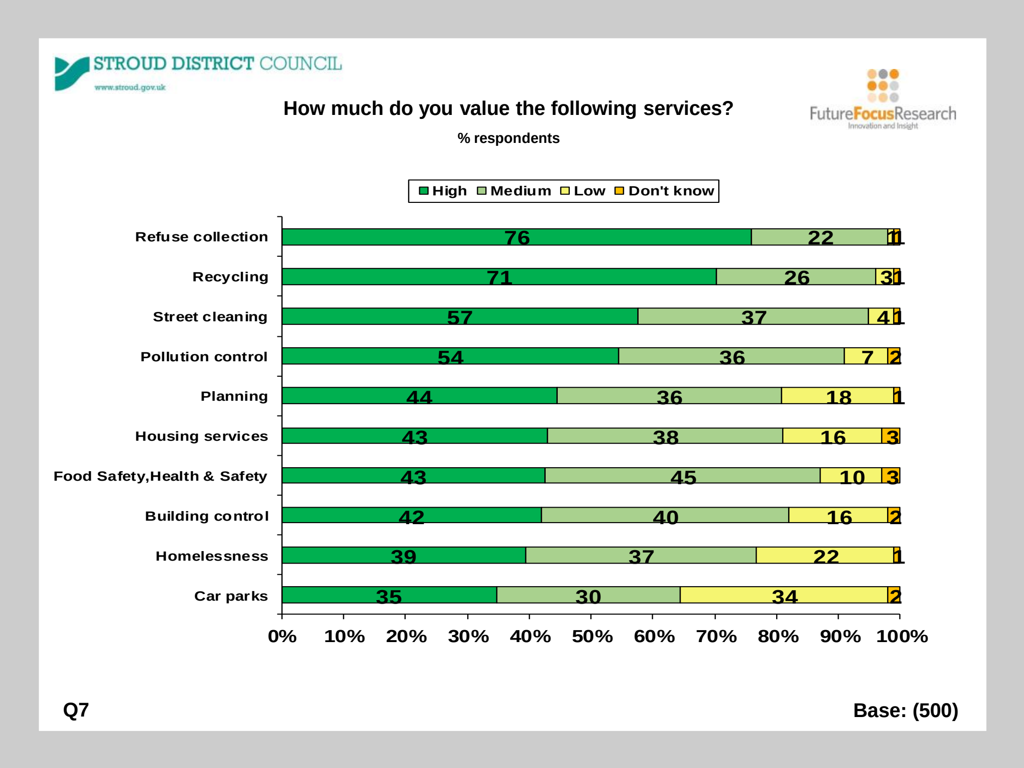
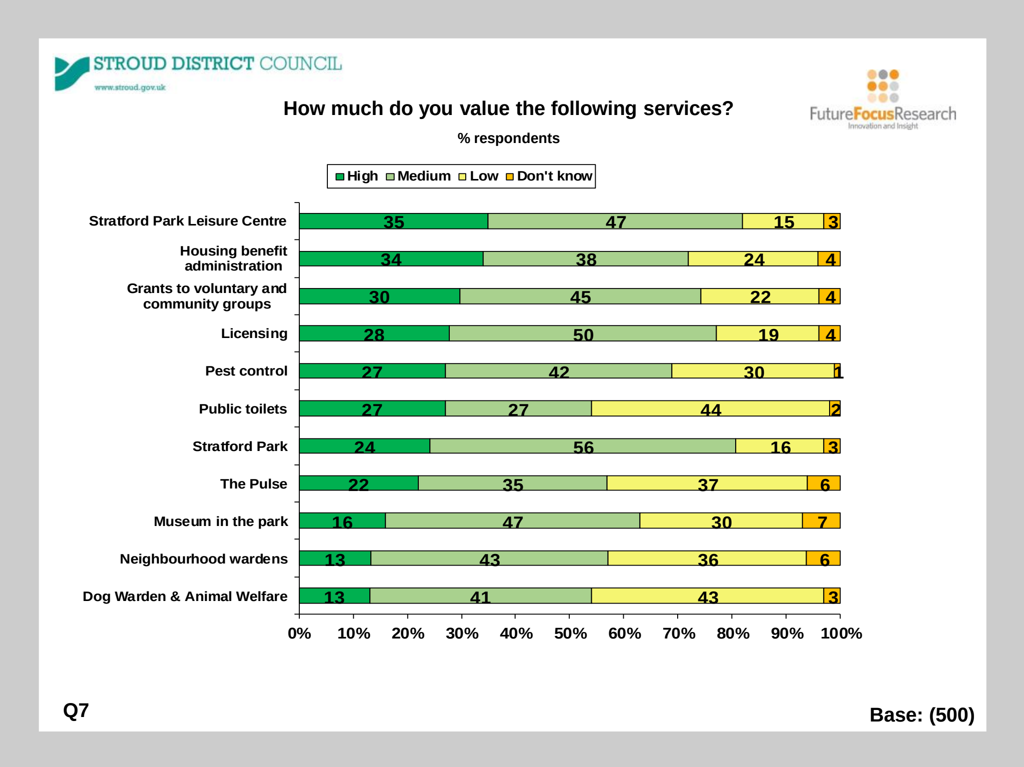
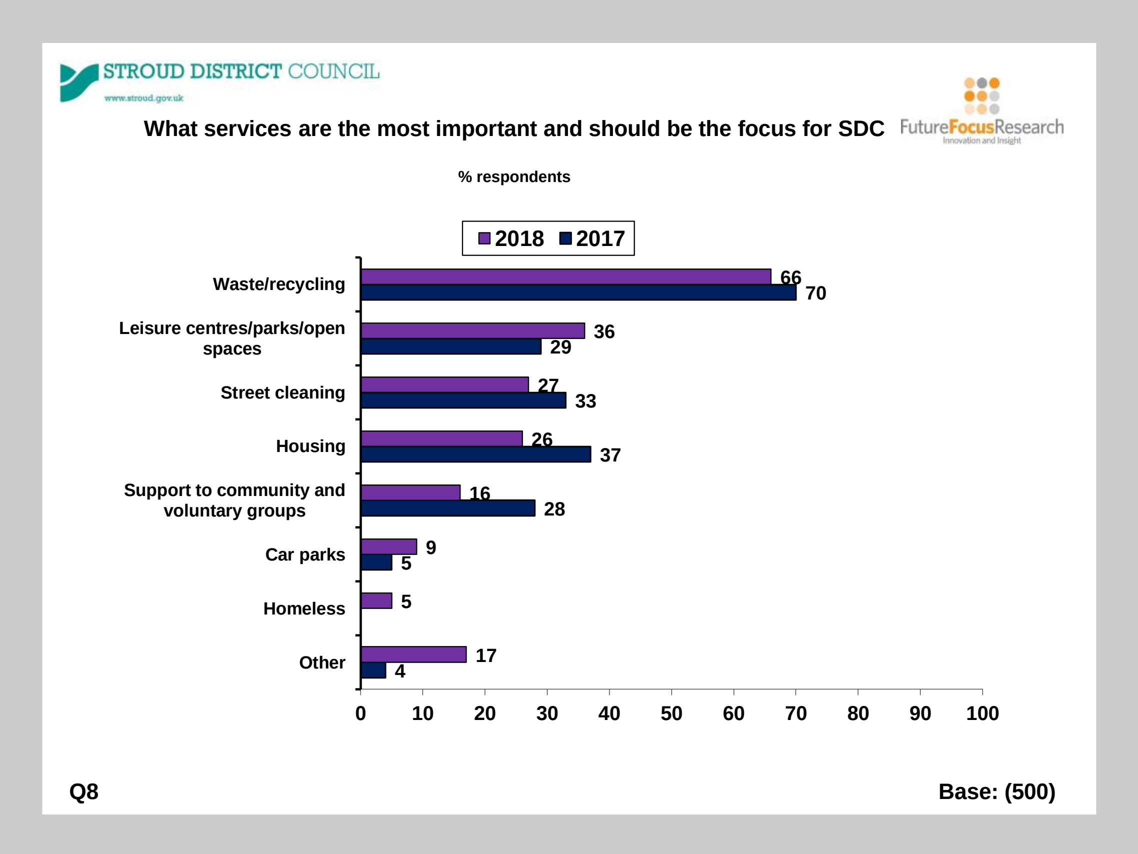


Figure 4.6



Respondents were asked what services are the most important and should be a focus for SDC. The most popular mentions were *waste/recycling* (66%) followed by *leisure centres/parks/open spaces* (36%). See figure 4.7

Figure 4.7



Those aged 18 – 34 were more likely to state that more focus on *leisure centre/parks/open spaces* was needed (59%) and less on *waste/recycling* (36%) and *support to community and voluntary groups* (6%).

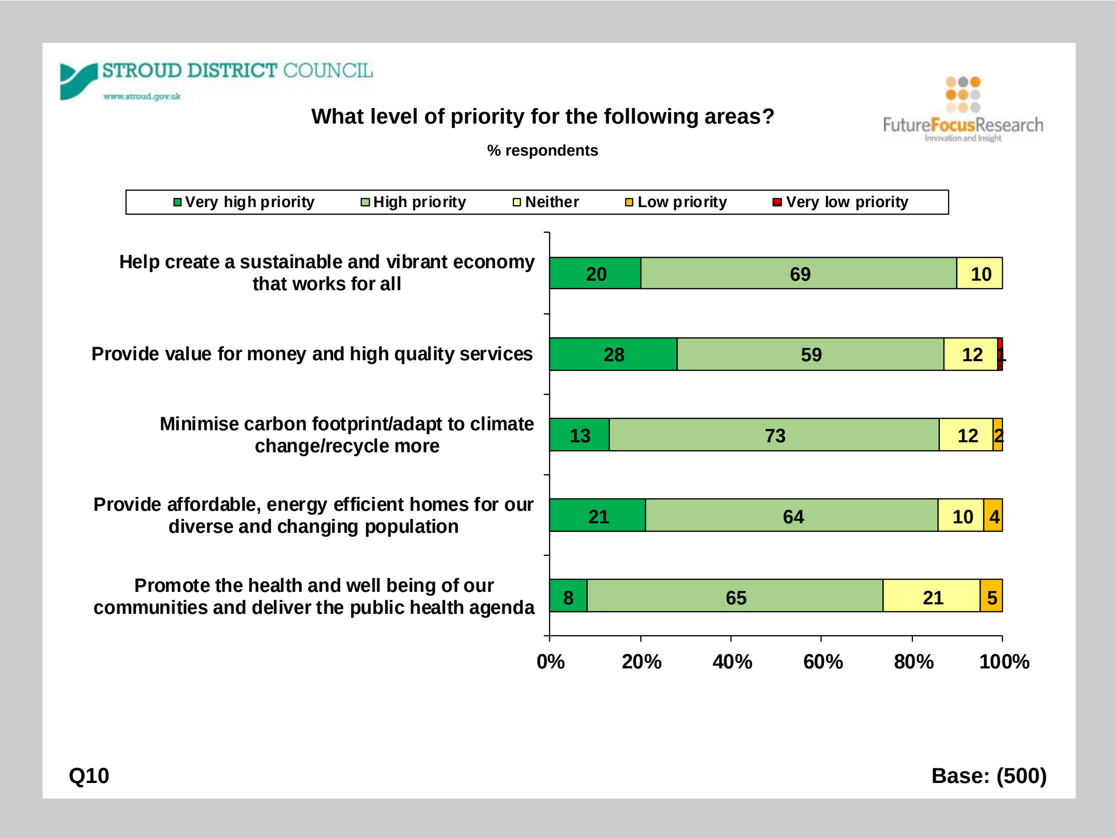
Corporate Delivery Plan

Respondents were then asked to indicate the level of priority for each of the five broad areas in the Corporate Delivery Plan. All areas were rated as either a *very high* or a *high* priority by the majority of respondents.

The area rated the highest priority was *help create a sustainable and vibrant economy that works for all* (89% very high or high) followed by *provide value for money to local taxpayers and high quality services to our customer* (87%).

Over 8 in 10 (86%) also felt that *minimise carbon footprint/adapt to climate change/recycle more* was a high or very high priority, whilst 85% felt that *provide affordable, energy efficient homes for our diverse and changing population.*
The area rated as lowest priority, but still a *high* or *very high* priority for 73% of respondents was *promote health and wellbeing and deliver the public health agenda*. See figure 4.8.

Figure 4.8



Those aged over 75 were less likely than other age groups to rate *minimise carbon footprint/recycle more/less waste to landfill* (76%), *help create a sustainable and vibrant economy that works for all* (75%) and *provide value for money to taxpayers and high quality services to our customers* (73%) as a high or very high priority.

Men were much more likely to rate *promote the health and wellbeing of our communities and deliver the public health agenda* as a high or a very high priority (80% compared to 66% of women) as were those aged 55 – 74 (82%) and aged 75+ (89%).

Whilst some areas have remained consistent with 2017, *provide affordable, energy efficient homes for our diverse and changing population* increased in priority from 78% to

85% as did *promote the health and wellbeing of our communities and deliver the public health agenda* (from 64% to 73%).

Provide value for money to taxpayers and high quality services to our customers decreased in priority from 96% to 87%. See figures 4.9 and 4.10.

Figure 4.9

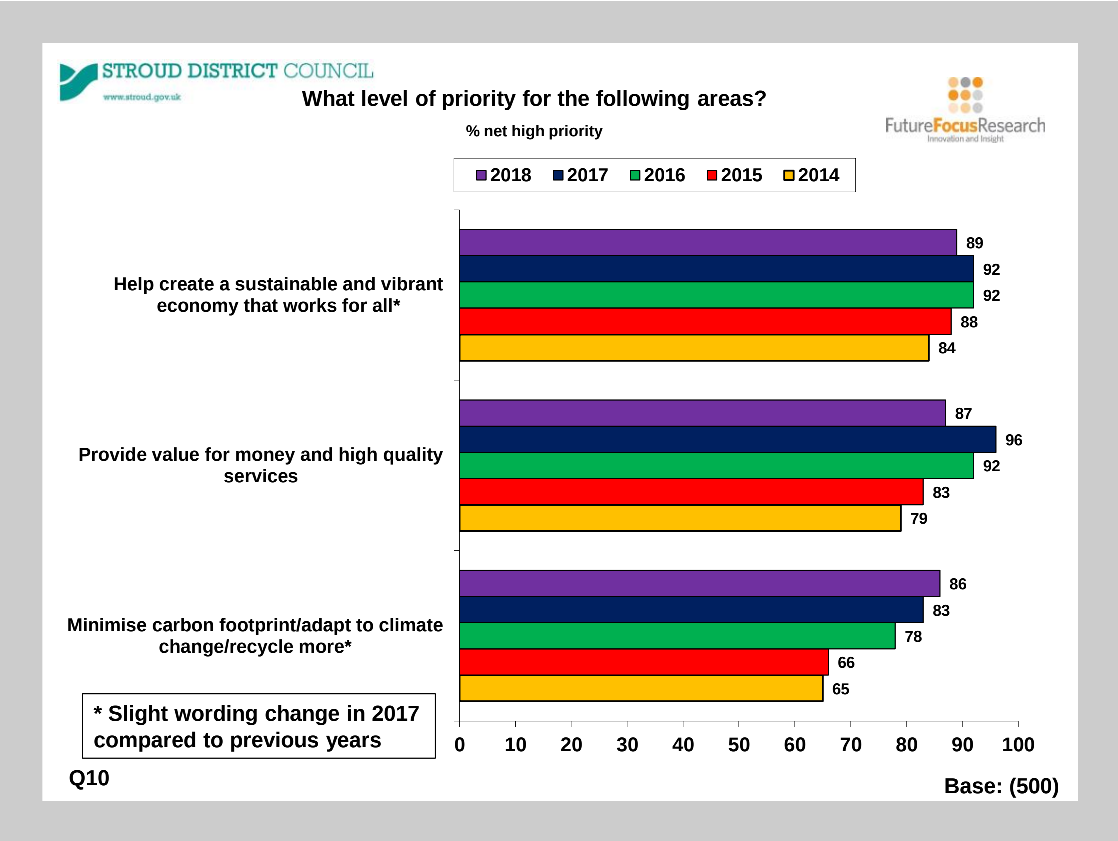
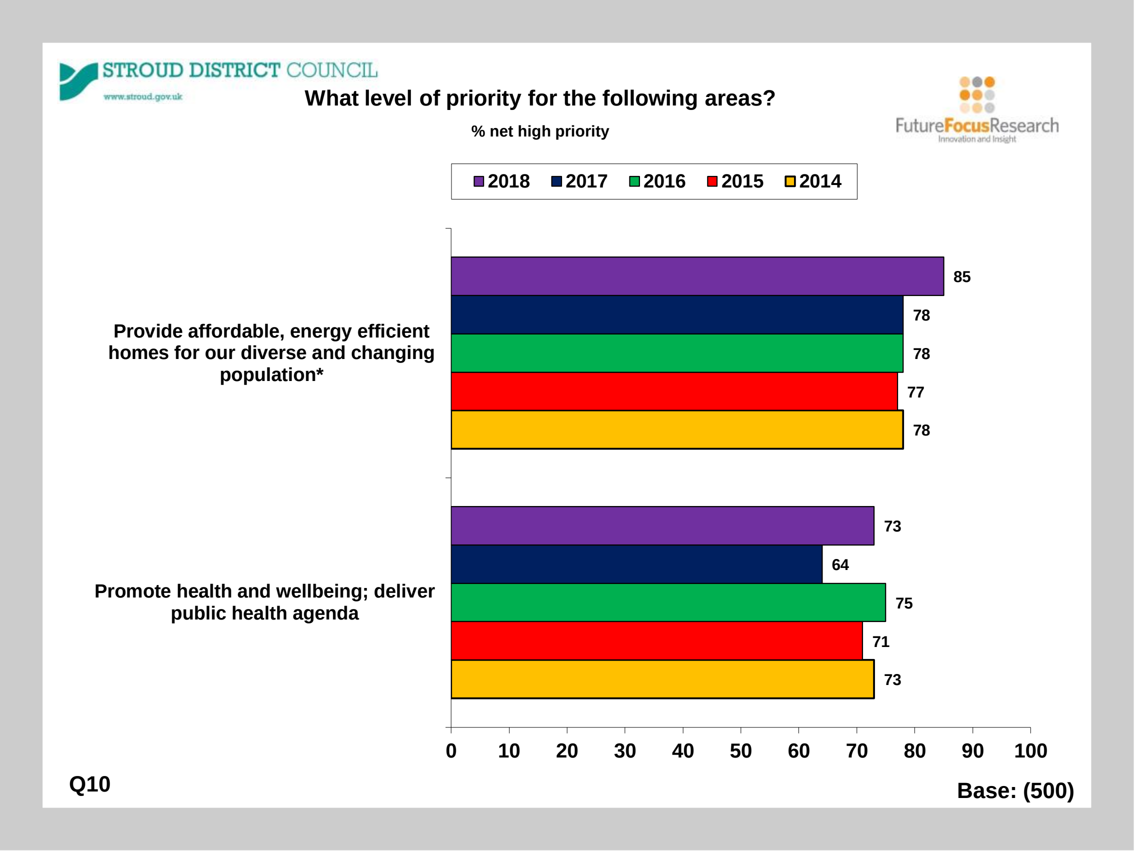


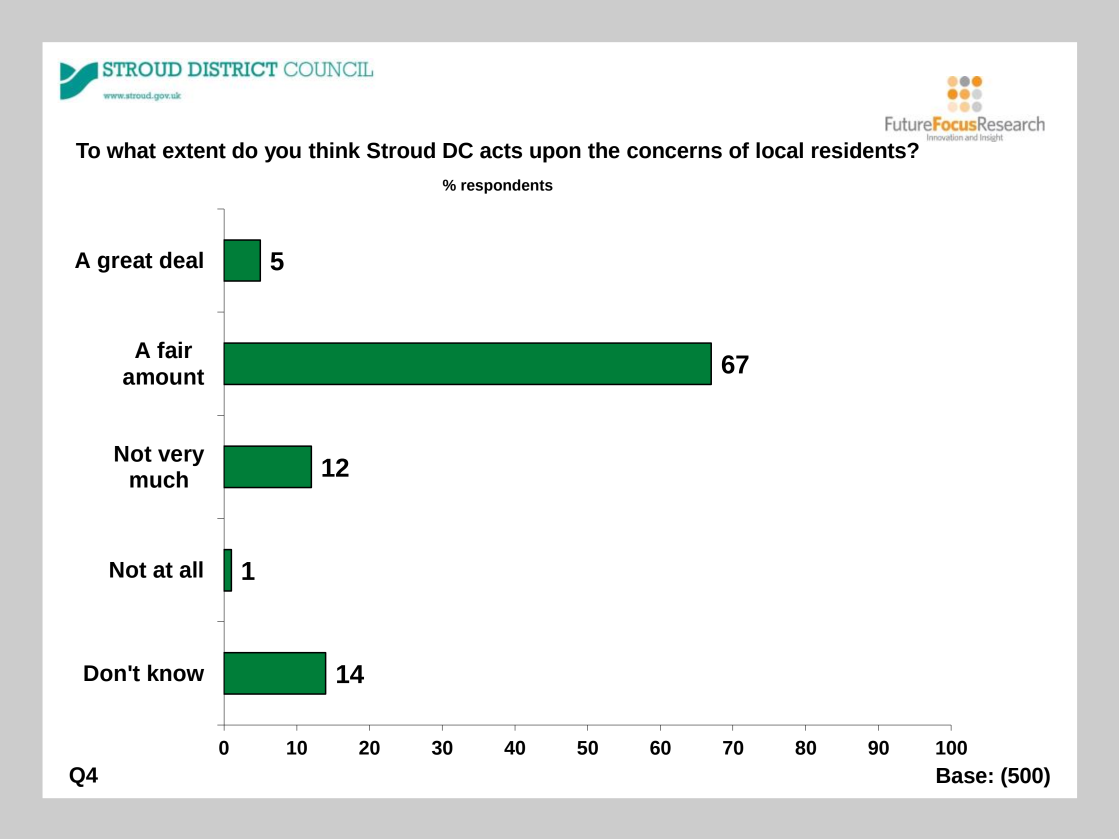
Figure 4.10


STROUD DISTRICT COUNCIL
www.stroud.gov.uk
What level of priority for the following areas?
% net high priority
FutureFocusResearch
Innovation and Insight
2018
2017
2016
2015
2014
Provide affordable, energy efficient homes for our diverse and changing population*
85
78
78
77
78
Promote health and wellbeing; deliver public health agenda
73
64
75
71
73
0
10
20
30
40
50
60
70
80
90
100
Q10
Base: (500)

4.2 Information from Stroud DC

Residents were asked to what extent they think Stroud DC *acts upon the concerns of local residents*. Over 7 in 10 (72%) felt that they did, either *a great deal* or *a fair amount*. This has remained more or less consistent with 2017 (74%). A further 13% stated *not very much* or *not at all* (17% in 2017). See figure 4.11.

Figure 4.11

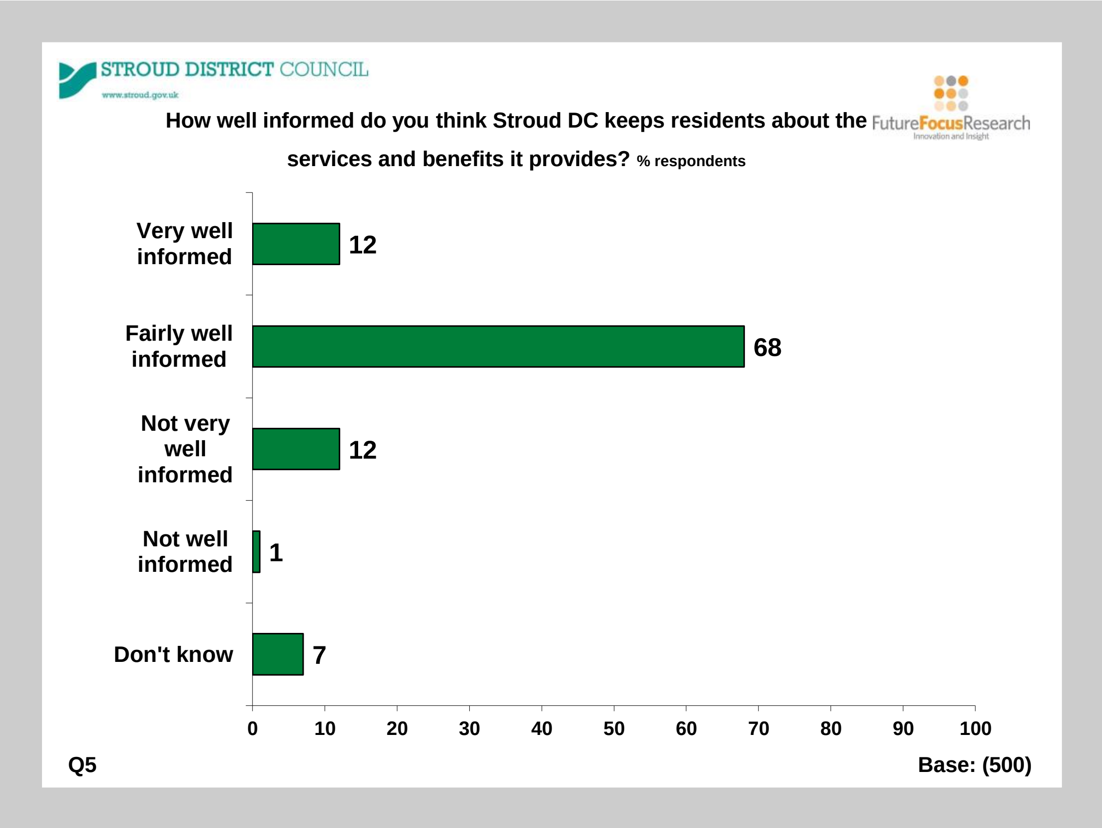


Those aged 18-34 were the least likely to say either *a great deal* or *a fair amount* (60%).

Residents were also asked how well they felt *Stroud DC keeps residents informed about the benefits and services it provides*. 80% felt that they were either *very well informed* or *fairly well informed*. This has remained consistent with 2017 (78%). See figure 4.12.

Those aged 18 – 34 were least likely to say that they were very or fairly well informed (65%).

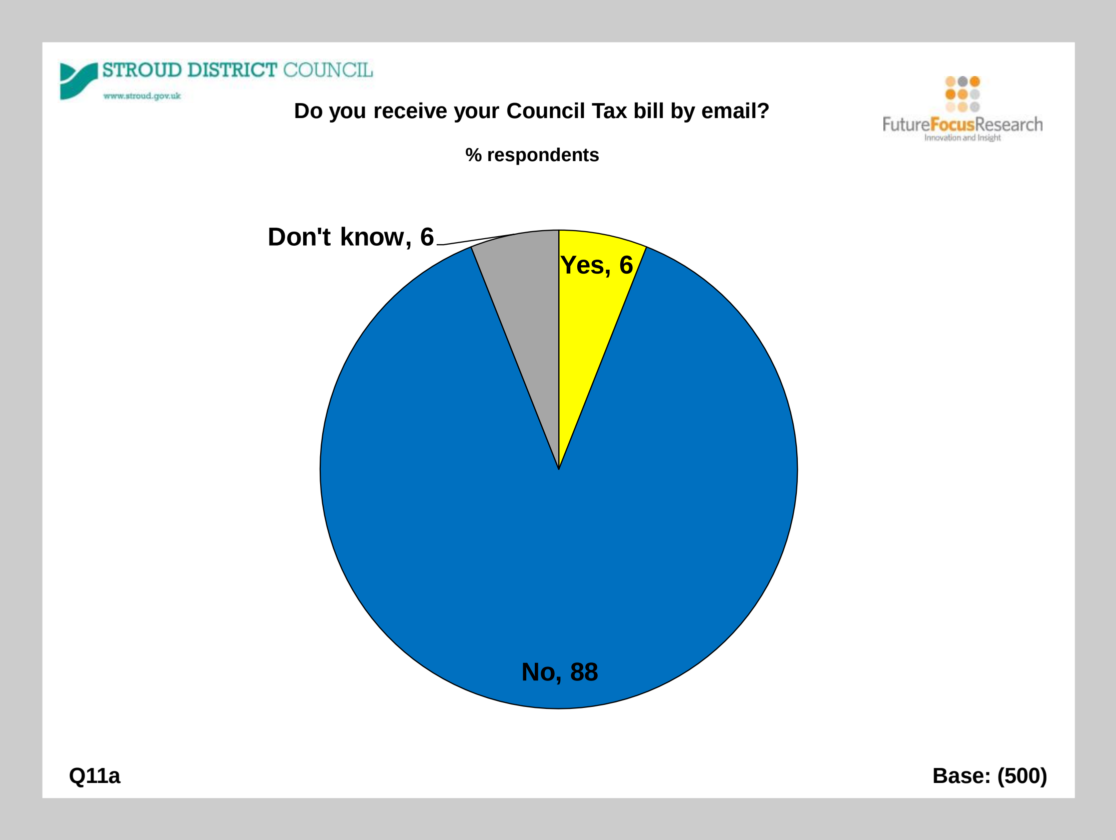
Figure 4.12


STROUD DISTRICT COUNCIL
www.stroud.gov.uk
How well informed do you think Stroud DC keeps residents about the services and benefits it provides? % respondents
FutureFocusResearch
Very well informed
12
Fairly well informed
68
Not very well informed
12
Not well informed
1
Don't know
7
0
10
20
30
40
50
60
70
80
90
100
Q5
Base: (500)

4.3 Council Tax

Just 6% said that they received their Council Tax bill by email.

Figure 4.13



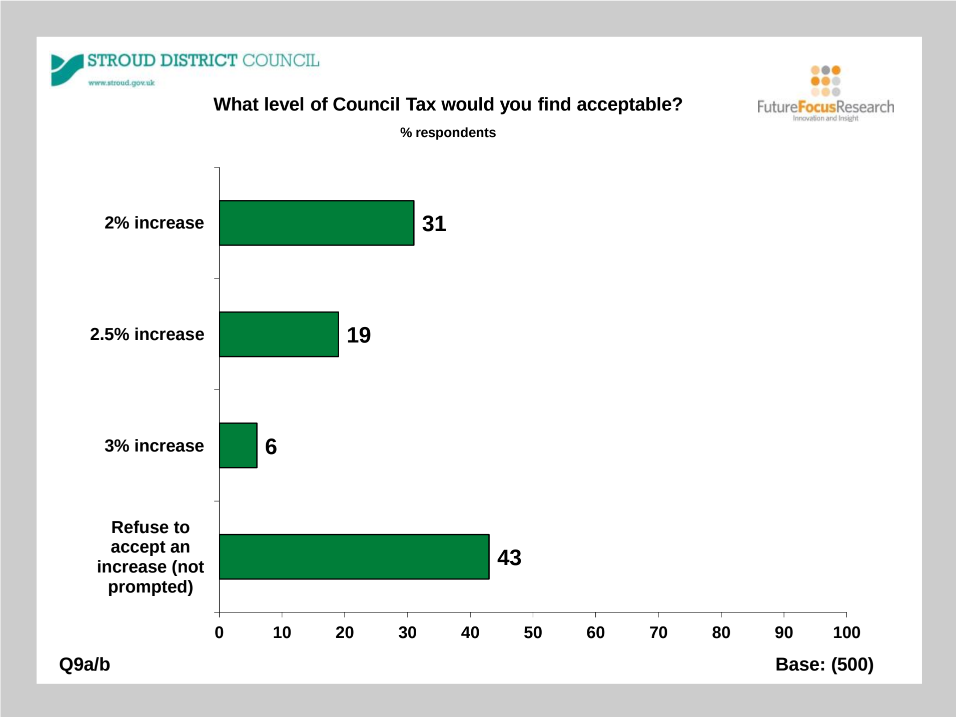
When asked why they didn't receive their Council Tax bill by email, 66% said nothing was stopping them, 13% said that they preferred paper and 6% had no email/ computer /internet.

Respondents were presented with the following three options for the District element of the Council Tax:

- *2% increase*
- *2.5% increase*
- *3% increase*

Despite it not being offered as a response, 43% would not accept an increase (67% amongst 18-34 year olds). Thirty one percent (31%) of respondents felt that there should be a *2% increase*. Almost 1 in 5 (19%) were prepared to accept a 2.5% increase and 6% would accept a 3% increase. In total 56% would accept an increase of 2% or more. See figure 4.14.

Figure 4.14

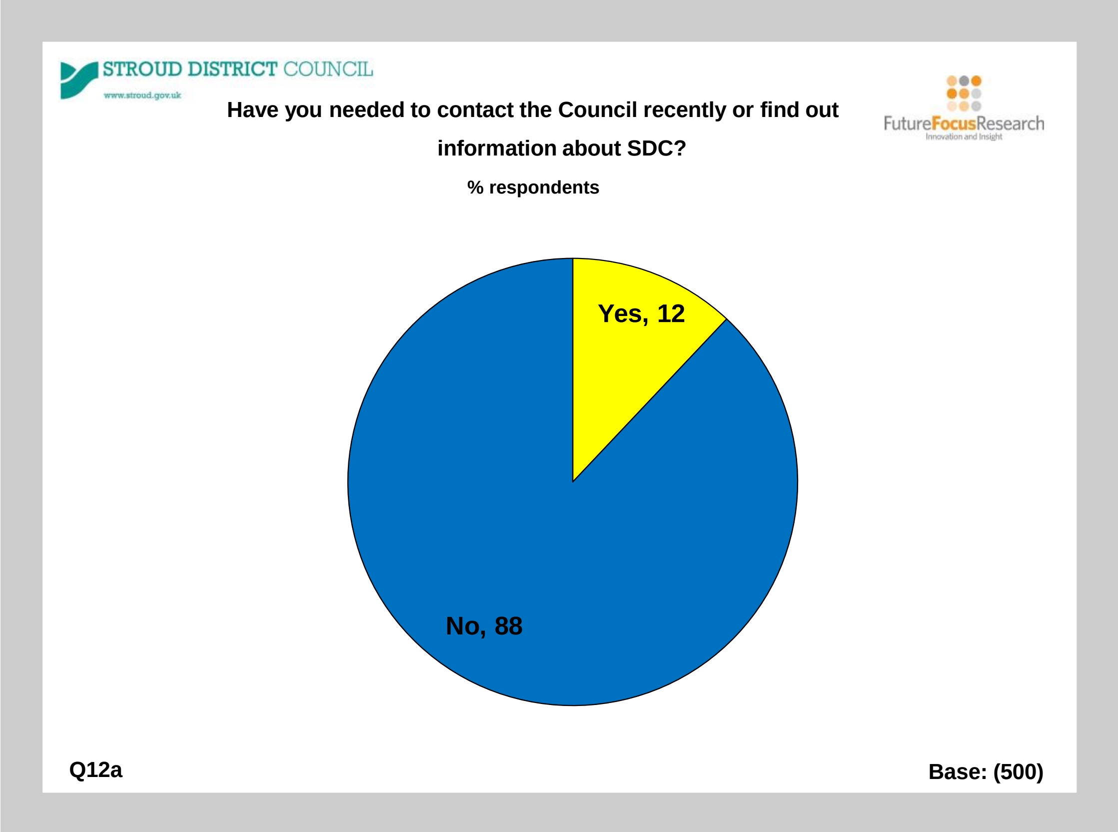


Those who said that they would pay a 3% increase, were asked whether they would be prepared to pay more than 3%. Of these, almost a half of them (48%) said that they would.

4.4 Contact with Stroud District Council

When asked, just 12% said that they had contacted Stroud DC recently or found out information about the Council. See figure 4.15.

Figure 4.15



Those aged over 75 were most likely to have made contact (25%).

For those who'd had contact with the Council, the main reasons for contact were:

- Waste & recycling/street cleaning 42%
- Council tax 23%
- Housing 15%
- Planning 8%

The main method was by telephone (75%). 18% had emailed the Council and 5% had used the website.

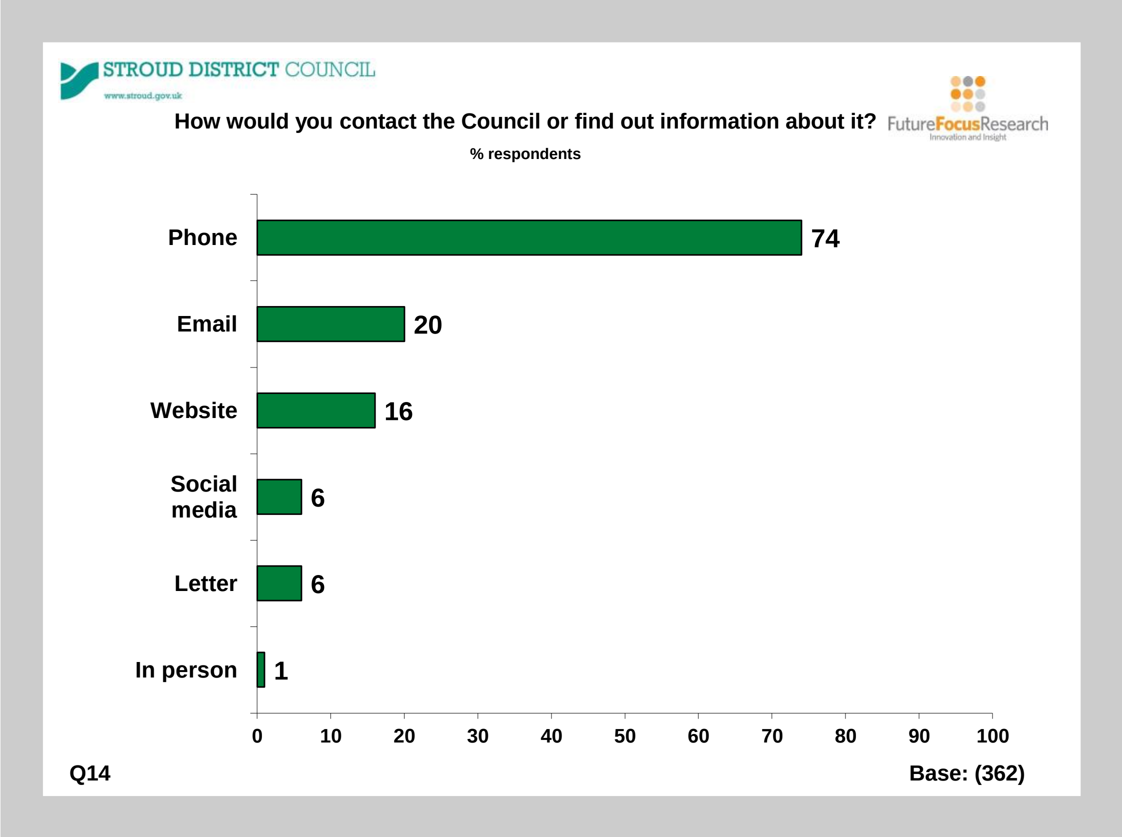
Of those who had used the website (5%, 3 people), all three said that they were able to do everything they needed to.

Those who did not chose to make contact via the website (98%) were asked the reasons why. The main reasons given were:

- Phoning was quicker 67%
- Needed to discuss payments 16%
- Prefer email 12%
- Needed to speak to a person 11%

Respondents were asked how they would go about contacting or finding out any information should they need to. The most popular response was by telephone (74%), followed by email (20%) and website (16%). See figure 4.16

Figure 4.16



Those aged 18 – 34 were most likely to use the website (33%) and were least likely to phone (51%).

5. Business Survey

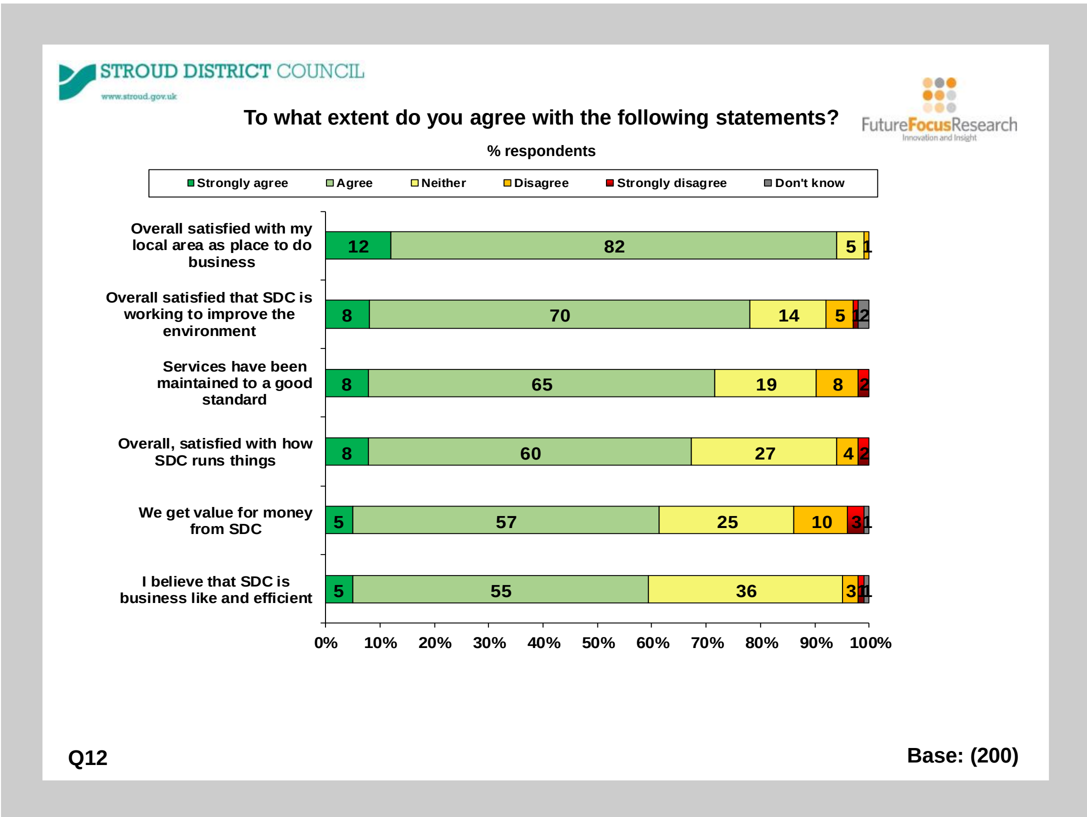
This section details the views and opinions from the resident survey, covering:

- Satisfaction and Priorities
- EU Referendum
- Information from Stroud District Council
- Contact with Stroud District Council

5.1 Satisfaction and Priorities

Over 9 in 10 (94%) agreed (strongly agree/agree) that they were *satisfied with their local area as a place to do business* and just under 8 in 10 (78%) agreed (strongly agree/agree) that they were *satisfied that Stroud DC is working to improve the environmen*t. Around seven in 10 agreed (strongly agree/agree) that *services have been maintained to a good standard* (73%) and that they were *satisfied with how Stroud DC runs things (68%).* Just over 6 in 10 agreed that they *get value for money from Stroud DC* (62%) and that they are *business like and efficient* (60%). See figure 5.1

Figure 5.1



Businesses with more than 10 employees were less likely to agree that *overall, the services provided by Stroud District Council have been maintained to a good standard* (58% compared to 78% of those employing 9 or less) and that *overall, I am satisfied that Stroud District Council is working to improve the environment* (84% compared to 65% of those employing 9 or less).

Comparing this year's results to previous years, the percentage agreement to all statements in 2018 is very consistent with 2017. See figure 5.2 and 5.3.

Figure 5.2

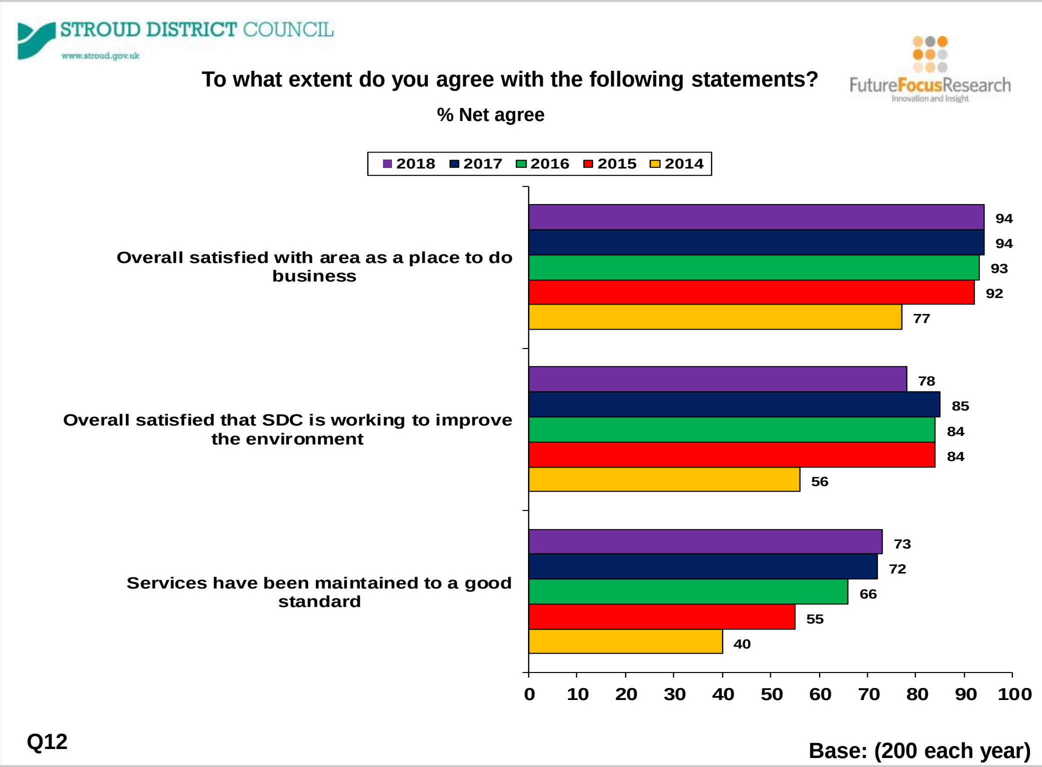


Figure 5.3

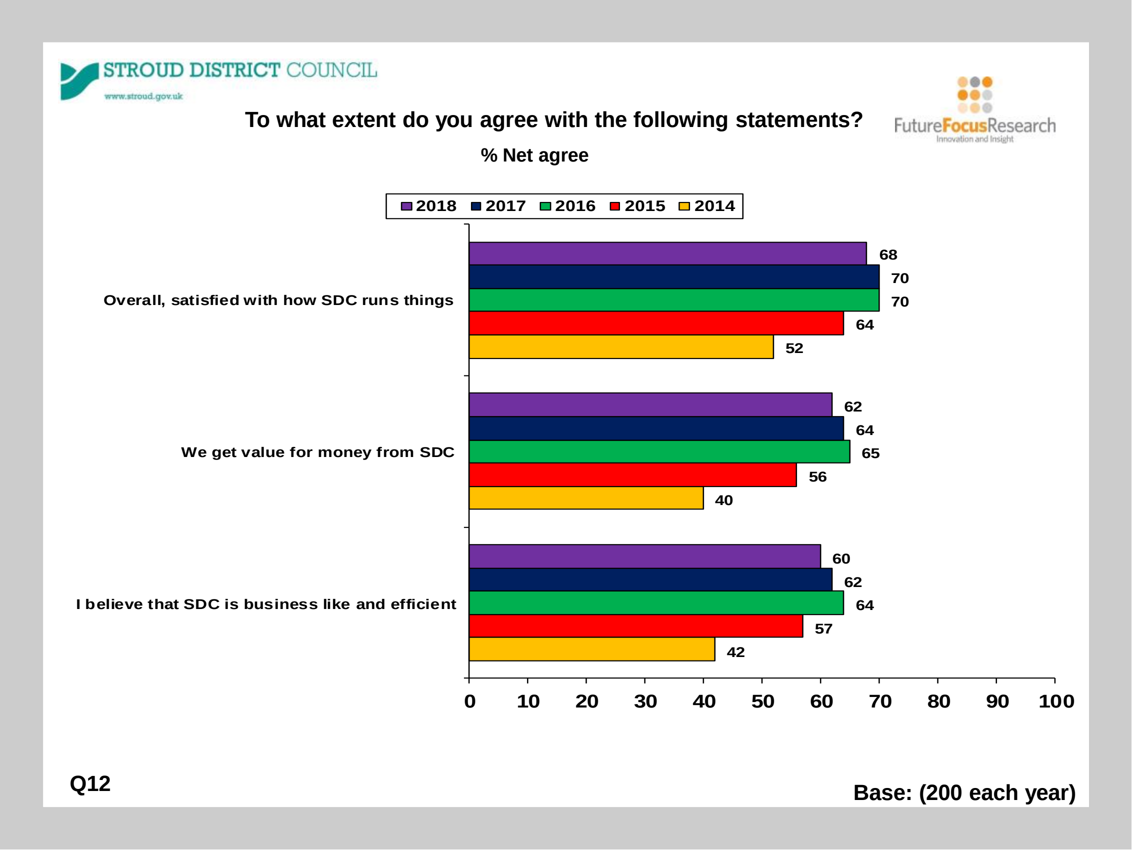
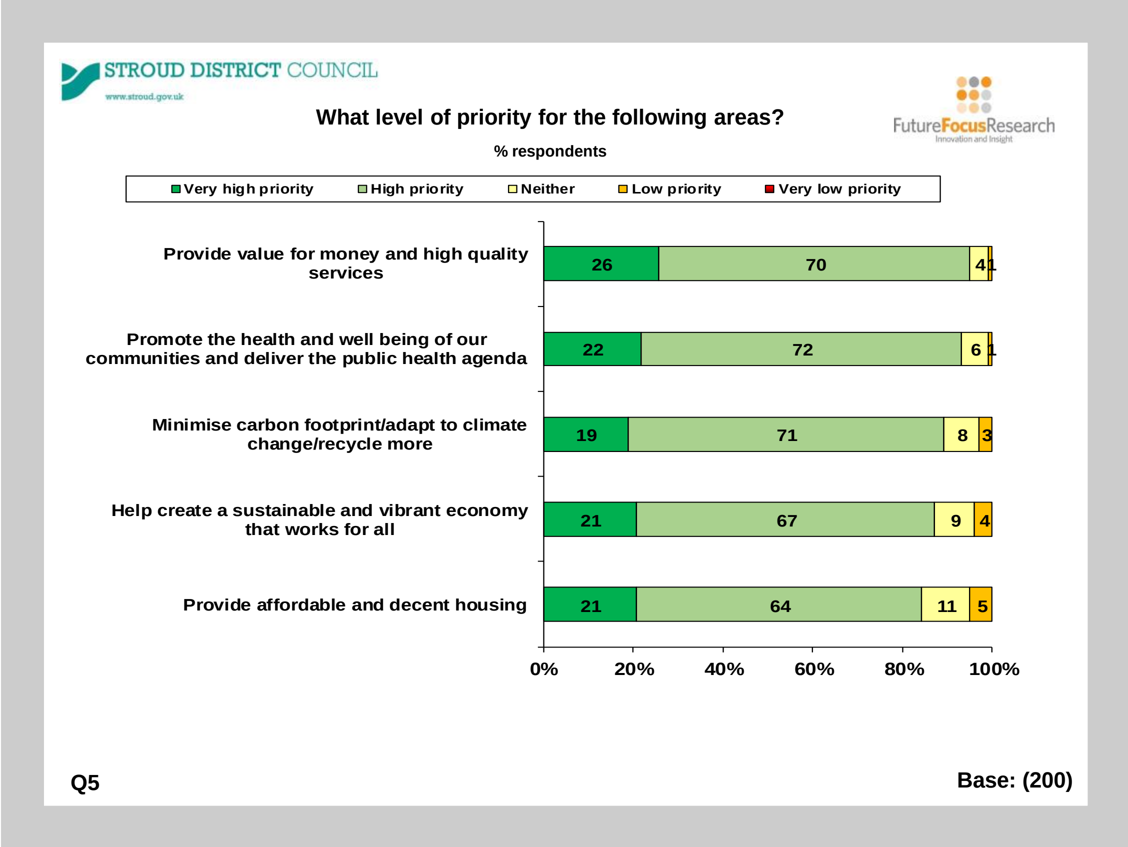


Figure 5.4 illustrates the extent to which respondents felt Stroud DC should prioritise certain areas.

The majority of respondents (over 80%) felt that all areas were a priority (either *very high* or *high*).

- *Provide value for money and high quality services* :96%
- *Promote the health and wellbeing of our communities and deliver the public health agenda* :94%
- *Minimise carbon footprint/adapt to climate change/recycle more* :90%
- *Help create a sustainable and vibrant economy that works for all:* 88%
- *Provide affordable and decent housing* :85%

Figure 5.4



For all areas, the levels of priority for 2018 have remained consistent to 2017. See figure 5.5.

Figure 5.5

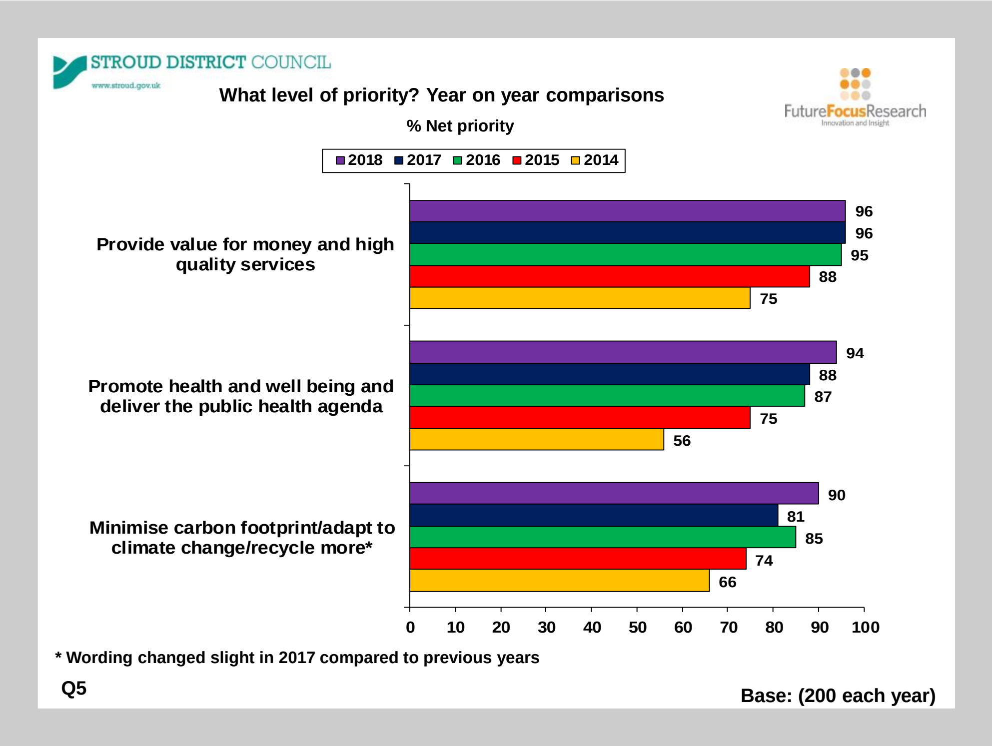
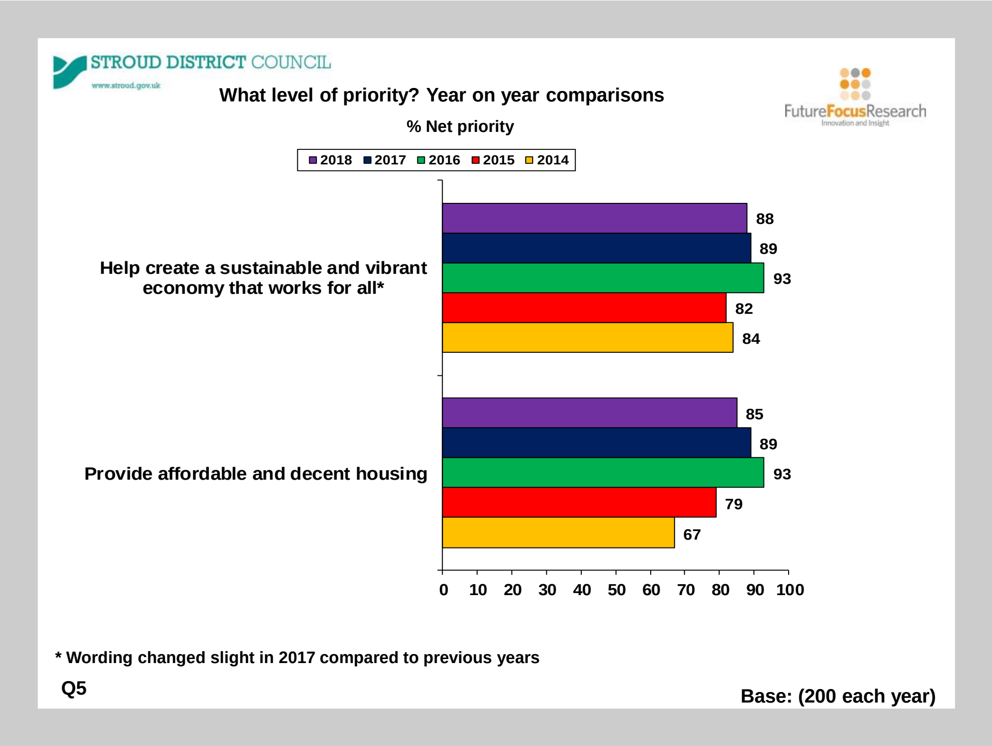
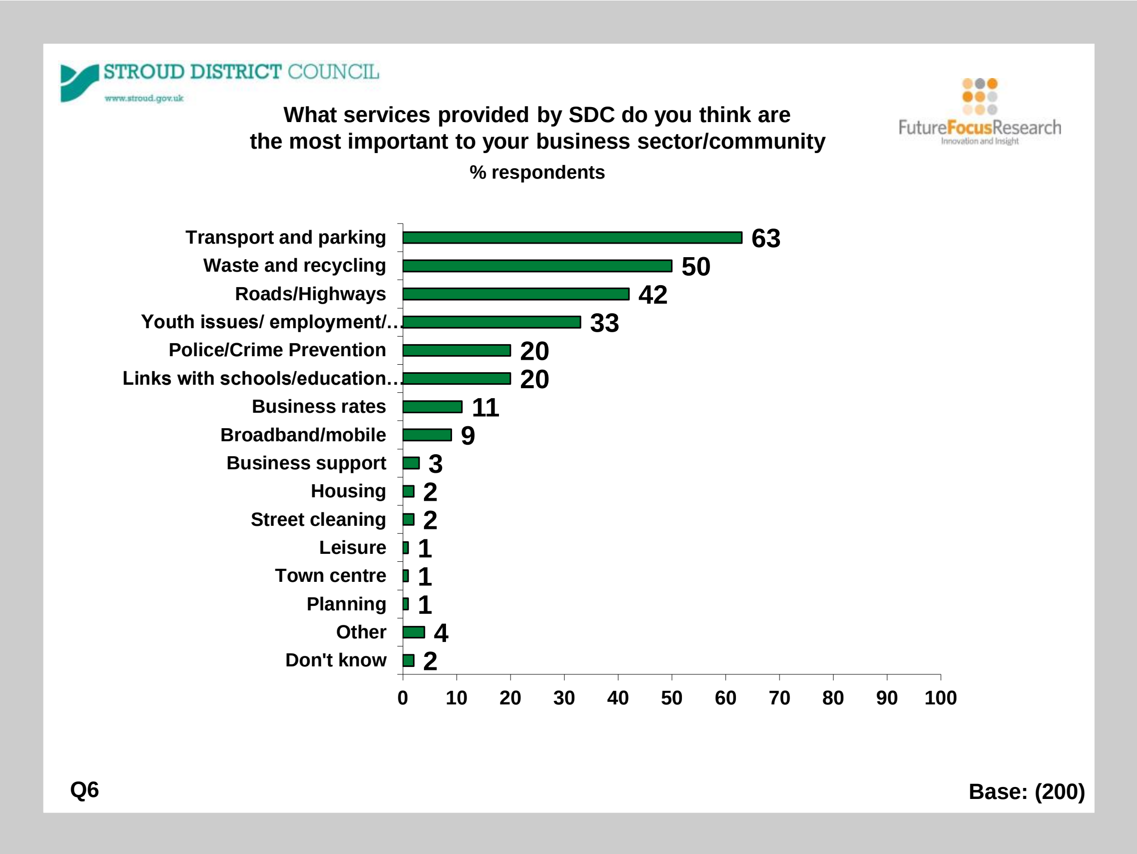


Figure 5.6



Respondents were then asked what services provided by Stroud DC they thought were most important to their business sector/community. *Transport and parking* (63%) was the most popular response, followed by *waste and recycling* (50%) and *roads and highways* (42%). See figure 5.7.

Figure 5.7



The percentage of businesses stating *waste and recycling* as most important increased from 27% in 2017 to 50% in 2018. *Transport and parking* increased from 54% in 2017 to 64% in 2018.

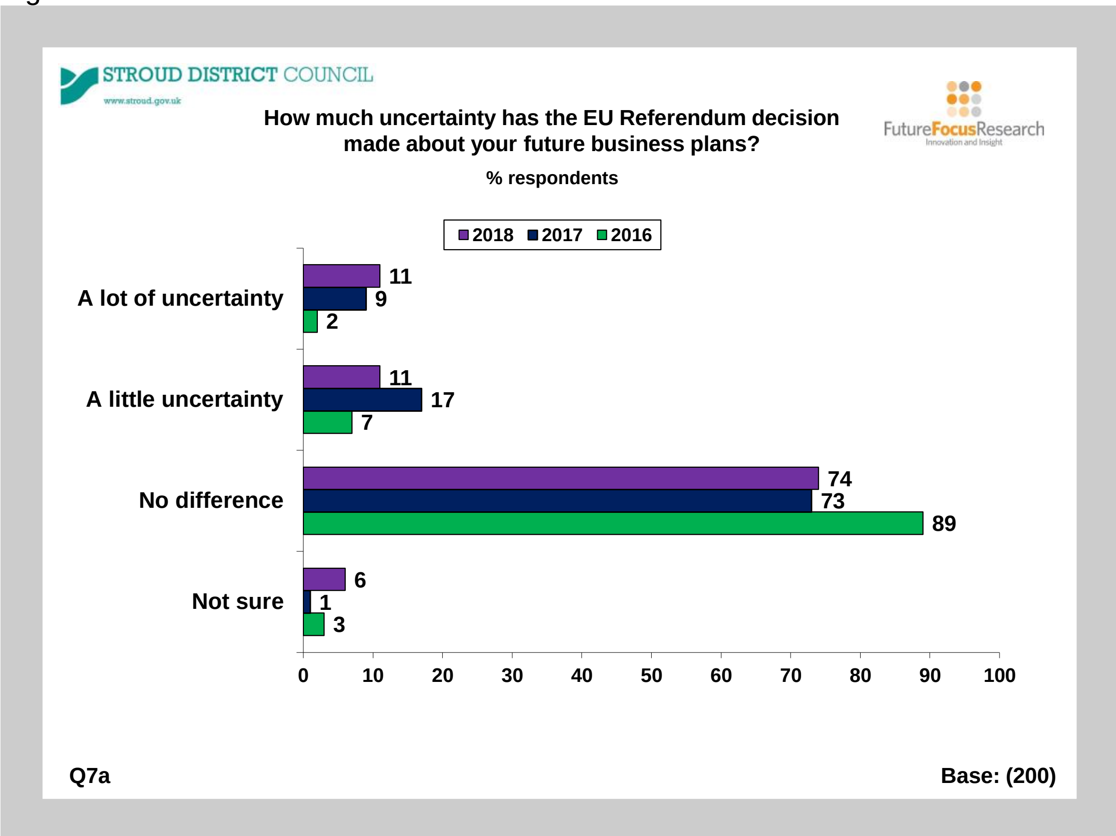
Larger businesses (those with 10 or more employees) were more likely to mention *youth issues/employment/apprenticeships* (43% compared to 28%) and *links with schools/education* (33% compared to 14%).

Smaller businesses (those with 9 or less employees) were most likely to mention roads and highways (47% compared to 30%).

5.2 EU Referendum

When asked about the EU referendum, 22% said that it had made them uncertain about their future business plans (either a little or a lot). This is similar to 2017 where 26% felt uncertainly, but still a lot higher than in 2016 where only 9% were uncertain. See figure 5.8.

Figure 5.8



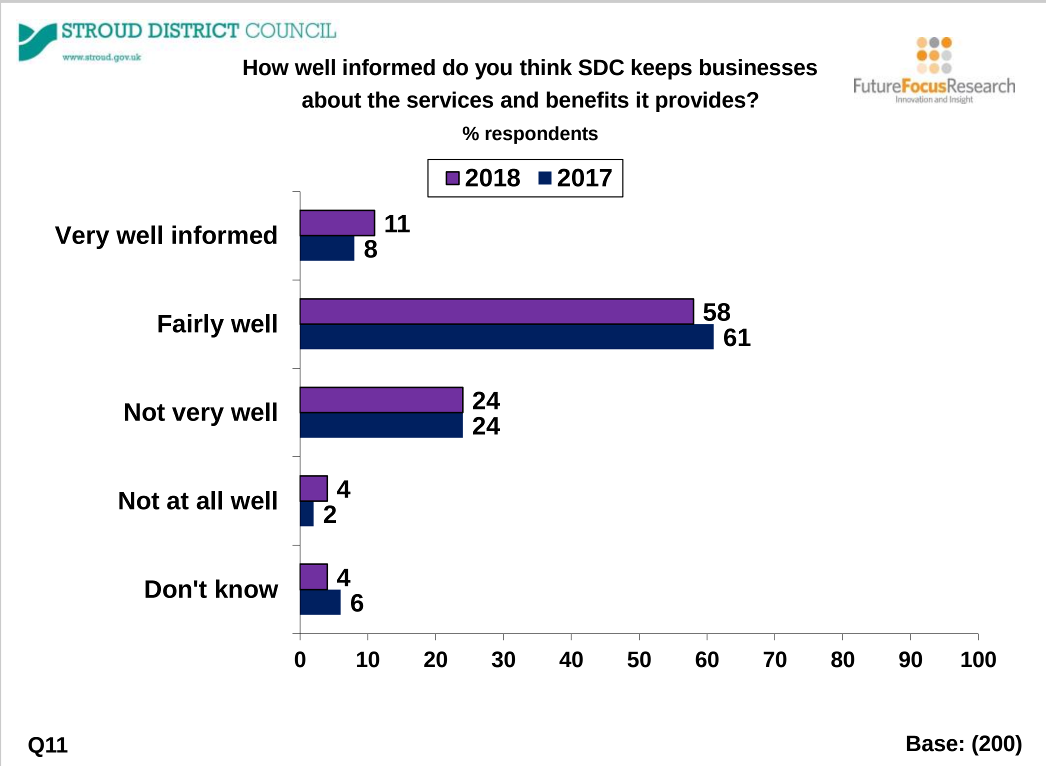
Reasons given for the uncertainty were:

- Retail confidence (36%, 15 businesses)
- Cost of raw materials (36%, 15 businesses)
- Exchange rate (19%, 8 businesses)
- Lack of markets to sell to (17%, 7 businesses)
- Cost of export (10%, 4 businesses)
- Labour from the EU (7%, 3 businesses)
- Changes in Government Policy (5%, 2 businesses)
- Wage costs (2%, 1 business)
- Acquisition of skilled labour (2%, 1 business)

5.3 Information from Stroud District Council

Businesses were asked *how well informed do they think SDC keeps businesses about the services and benefits it provides*. Just under 7 in 10 businesses (69%) said that they were either *very well* or *fairly well informed* the same as in 2017. See figure 5.9.

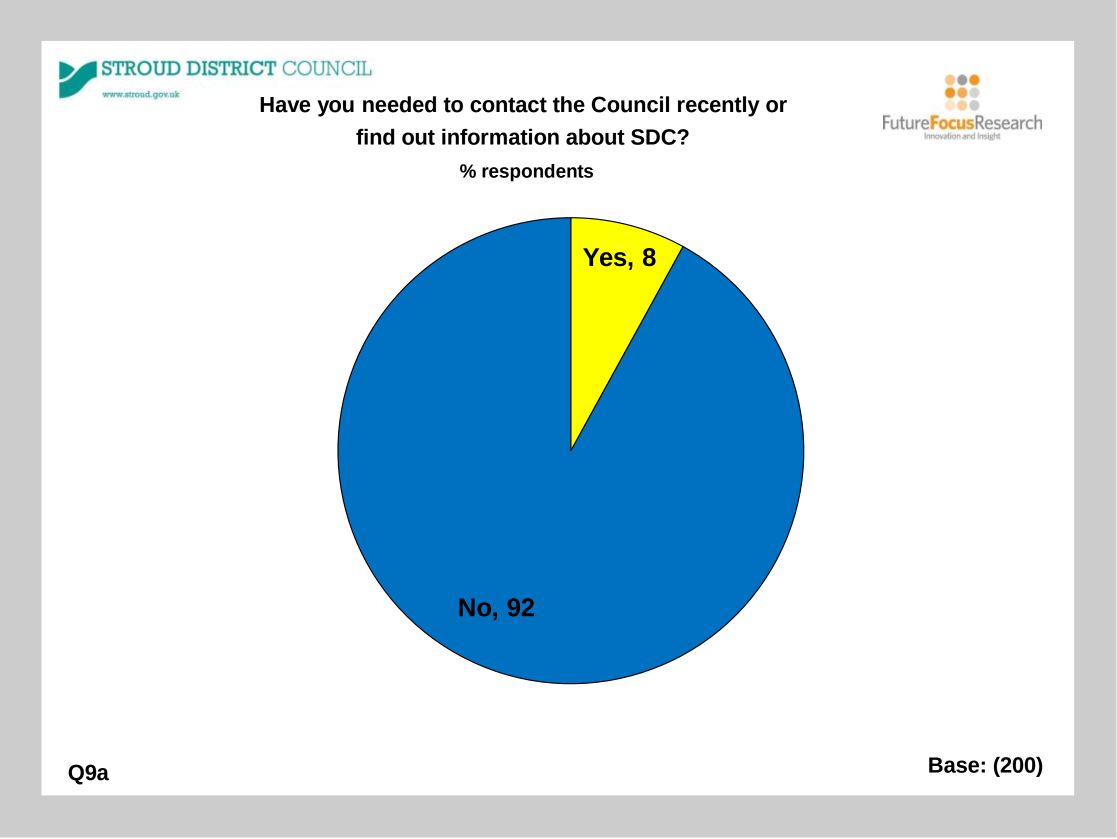
Figure 5.9



5.4 Contact with Stroud District Council

Around 1 in 12 (8%) had contacted the Council recently or needed to find out information about SDC. This is lower than in 2017 (16%), but consistent with 2016 (8%). See figure 5.10

Figure 5.10



Larger businesses (those with 10 or more employees) were more likely to have contacted the Council (15% compared to 5% of small businesses).

The main method of contact was by phone (63%) followed by email (44%).

Reasons for contact included:
- Waste & recycling, street cleaning
- Planning
- Business rates/Council tax

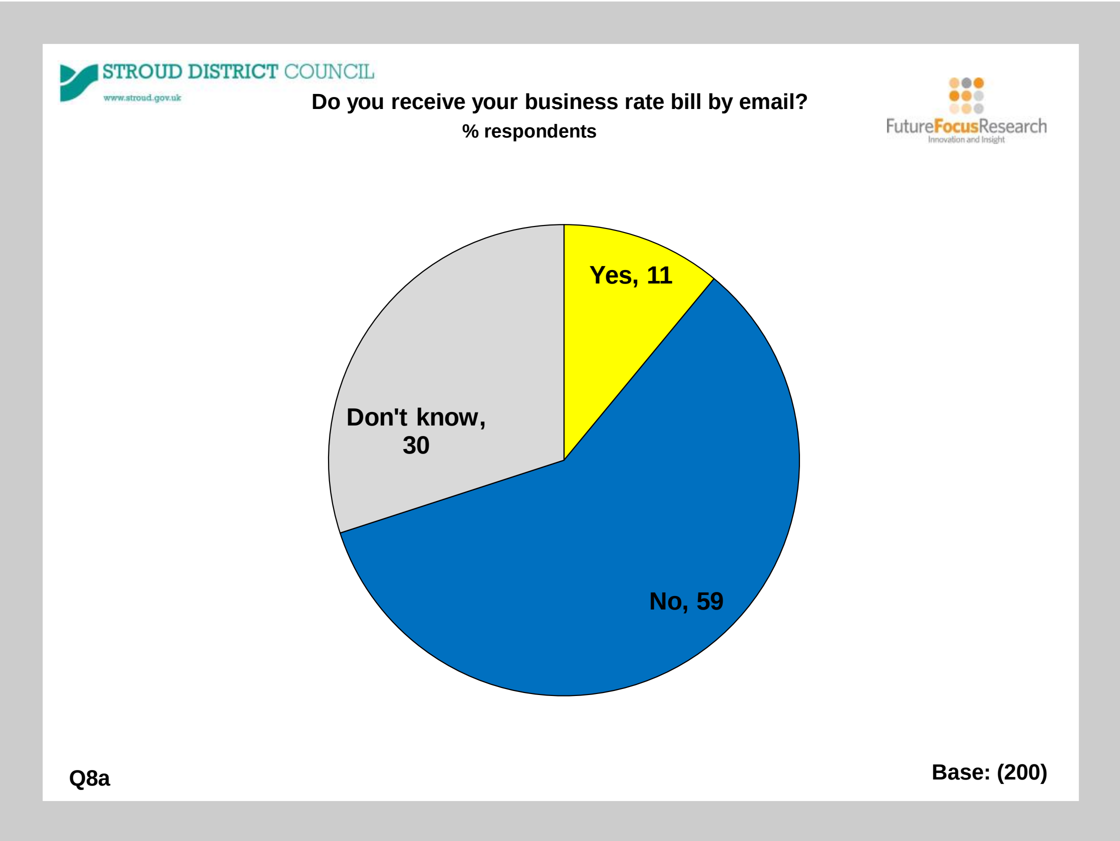
Those who used the website to make contact/ find out information (19%, 3 businesses) we asked whether they managed to do everything that they needed to. All but one said that they did and resolving the issue (planning portal) proved difficult.

Those who didn't use the website (81%, 13 businesses) were asked the reasons why. The main reasons given were:

- *Phoning was quicker* (69%)
- *Needed to discuss payments* (8%)
- *Don't know* (31%).

Businesses were then asked whether they received their business rate bill by email. Just 11% said that they did. See figure 5.11.

Figure 5.11



Those who didn't receive their bills by email (59%, 118 businesses), were asked the reasons why. Just 1 in 6 of these (16%, 19 businesses) said that they preferred paper bills, whilst the majority of the others had no specific reason why they didn't receive bills by email.

Appendix A Local area postcodes

Ref	Area Name	Postcodes
1.	Gloucester Border areas	GL2.2, 2.3, 2.4, 2.7, 3.4, 4.0, 4.8
2.	Stroud Central	GL5.1, to GL5.5
3.	Stroud Border Areas	GL6.0 to GL6.9
4.	Stonehouse	GL10.2, 10.3
5.	Dursley	GL11.4 to GL11.6
6.	Wotton-Under-Edge	GL12.7, 12.8
7.	Berkeley	GL13.9