



Exeter
City Council

Budget Consultation

Full report

January 2025



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Key findings

01.

Budget: What should the Council invest in?



High levels of agreement with investing in more temporary accommodation to prevent homelessness, affordable, clean and secure energy, building more council houses, and growth and regeneration

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- In the interviewer led survey:
 - 86% agreed with providing more temporary accommodation to prevent homelessness
 - 81% agreed with securing affordable, clean and secure energy
 - 77% agreed with building more council houses
 - 76% agreed with encouraging growth, regeneration, and inward investment
- Although agreement was still high in the online survey, the level was slightly lower for providing more temporary accommodation to prevent homelessness (77%), securing affordable, clean and secure energy (70%), and building more council houses (74%)
- A slightly larger proportion agreed in the online survey that the Council should invest in encouraging growth, regeneration and inward investment (80%)



Although agreement was still higher than disagreement, there was less support for facilitating the delivery of new homes, delivery of District Heat Networks, and bringing forward an electric vehicle strategy

- In the interviewer led survey:
 - 65% agreed with facilitating the delivery of more new homes
 - 57% agreed with the delivery of District Heat Networks
 - 43% agreed with bringing forward an electric vehicle strategy and 33% disagreed
- Online respondents were less likely to agree with these and more likely to disagree
- Disagreement was highest in the online survey with bringing forward an electric vehicle strategy (36%), followed by delivery of District Heat Networks (33%)

Budget: How should the Council reduce costs?



All options saw higher levels of agreement than disagreement, with the majority being opposed to reducing the number of public toilets and their opening times, deep cleaning the city centre less often, and stopping cash payments for council services

- In the interviewer led survey:
 - 72% disagreed with reducing the number of public toilets run by the Council and 64% disagreed with reducing their opening times
 - 62% disagreed with stopping accepting cash payments for services
 - 62% disagreed with deep cleaning the city centre less often
 - 47% disagreed with reducing the subsidy on the six Council run leisure facilities
 - 43% disagreed with ending grant funding to independent arts and culture organisations
 - Agreement was highest with ending grant funding to independent arts and culture organisations (32%) and reducing the subsidy on the six Council run leisure facilities (30%)
- Online respondents were also more likely to disagree than to agree with each option
- Online respondents were more likely to disagree with each option than those in the interviewer led survey, except in relation to stopping cash for payments for services, where they were more likely to agree



Budget: How should the Council raise money?



Some agreement with charging private landowners for clearing up rubbish from their land open to the public, increasing fees for HMOs and introducing parking charges across all car parks

- In the interviewer led survey:
 - 58% agreed with charging private landowners for clearing up rubbish from their land open to the public (24% disagreed)
 - 44% agreed with increasing fees for licensing Houses in Multiple Occupancy (HMOs) (23% disagreed)
 - 43% agreed with introducing car parking charges across all council parks (37% disagreed)
- For these measures, larger proportions agreed in the online survey than in the interviewer led survey:
 - 70% agreed with charging private landowners for clearing up rubbish from their land open to the public
 - 68% agreed with increasing fees for licensing HMOs
 - 48% agreed with introducing car parking charges across all council car parks



Disagreement was higher than agreement for other measures, most notably for above inflation increases on car parking charges and introducing emission charges in council car parks

- In the interviewer led survey:
 - 57% disagreed with introducing above inflation increases on car parking charges (26% agreed)
 - 48% disagreed with introducing charging for blue badge parking in council car parks (37% agreed)
 - 45% disagreed with introducing emission charges in council car parks (31% agreed)
 - 42% disagreed with increasing the number of car parks in Central Zone thereby increasing fees (39% agreed)
 - 41% disagreed with introducing admission charges for non-residents to the RAMM (39% agreed)
- Online survey respondents were more likely to agree with introducing charging for blue badge parking (51%), introducing emission charges (35%) and introducing above inflation increases on car parking charges (33%)



Consultation overview

02.

Introduction

Exeter City Council is committed to listening to and engaging with residents, to continuously improve service provision and inform decision making. As a first stage, the Council commissioned Enventure Research to deliver a resident survey to understand what residents think is currently working well, what could be improved, and how they feel about living in Exeter.

As a next stage, Exeter City Council wished to undertake a Budget and Corporate Plan consultation to elicit feedback from residents on how to make the best use of council resources to set a balanced budget in the financial year April 2025 to March 2026. In addition, the Council wanted to understand residents' views of, and attitudes towards, its key strategic priorities and outcomes for the future, which will be set out in the Council's Corporate Plan.

The Council appointed Enventure Research, an independent research agency, to deliver the consultation. This report covers the responses to the Budget Consultation.



Consultation methodology

- A questionnaire was co-designed by the Council and Enventure Research, informed in part by results from the latest resident survey.
- The survey was undertaken with residents of the Exeter City Council area aged 16+ using a CATI methodology (Computer Aided Telephone Interviewing) with additional face-to-face on-street interviews carried out to balance quotas with hard-to-reach residents.
- Quotas were set to achieve a sample that was representative of the local population in terms of age group, gender and area.
- Interviews took on average 12 minutes.
- The survey was piloted to check ease of understanding, and that the length was appropriate.
- **1,101 interviews** were completed between 18 November and 17 December 2024.
- An online survey could also be completed, which gave residents, visitors and those studying in Exeter the opportunity to have their say in the consultation.
- The online survey was widely promoted by the Council and could be completed between 18 November 2024 and 9 January 2025, and during this time **597 responses** were received.



Interpreting the results

As the survey was completed by a sample and not the entire population of Exeter, results are subject to sampling tolerances. Based on an approximate total Exeter population of 129,000 (2021 census), a sample of 1,101 responses to the interviewer led survey gives results that are accurate to approximately $\pm 3.0\%$ at the 95% confidence interval.

This report contains various tables and charts. In some instances, the responses may not add up to 100%. There are several reasons why this might happen:

- The question may have allowed each respondent to give more than one answer (multiple choice)
- Only the most common responses may be shown in the table or chart
- Individual percentages are rounded to the nearest whole number so the total may come to 99% or 101%
- A response of between 0% and 0.4% will be shown as 0%

For the analysis of certain questions, response options have been grouped together to provide an overall level. For example, in some instances 'strongly agree' and 'tend to agree' have been grouped and shown as 'total agree'.

Statistical analysis has been used to explore differences in the results provided by key subgroup segments of residents. Where base sizes for groups are not large enough, subgroups have been combined to create larger groups. Subgroup analysis is shown only where statistically significant differences between subgroups at the 95% confidence level have been found using the z-test. This analysis has been carried out only for the interviewer led survey.

Verbatim comments from open-end (free text) questions were read in detail and code frames developed to show thematic analysis and categorisation of themes.

Results from the online survey are shown in the report as comparisons with those from the interviewer led survey. As the sample profile of online respondents differs from that of the interviewer led survey, these comparisons are indicative only.



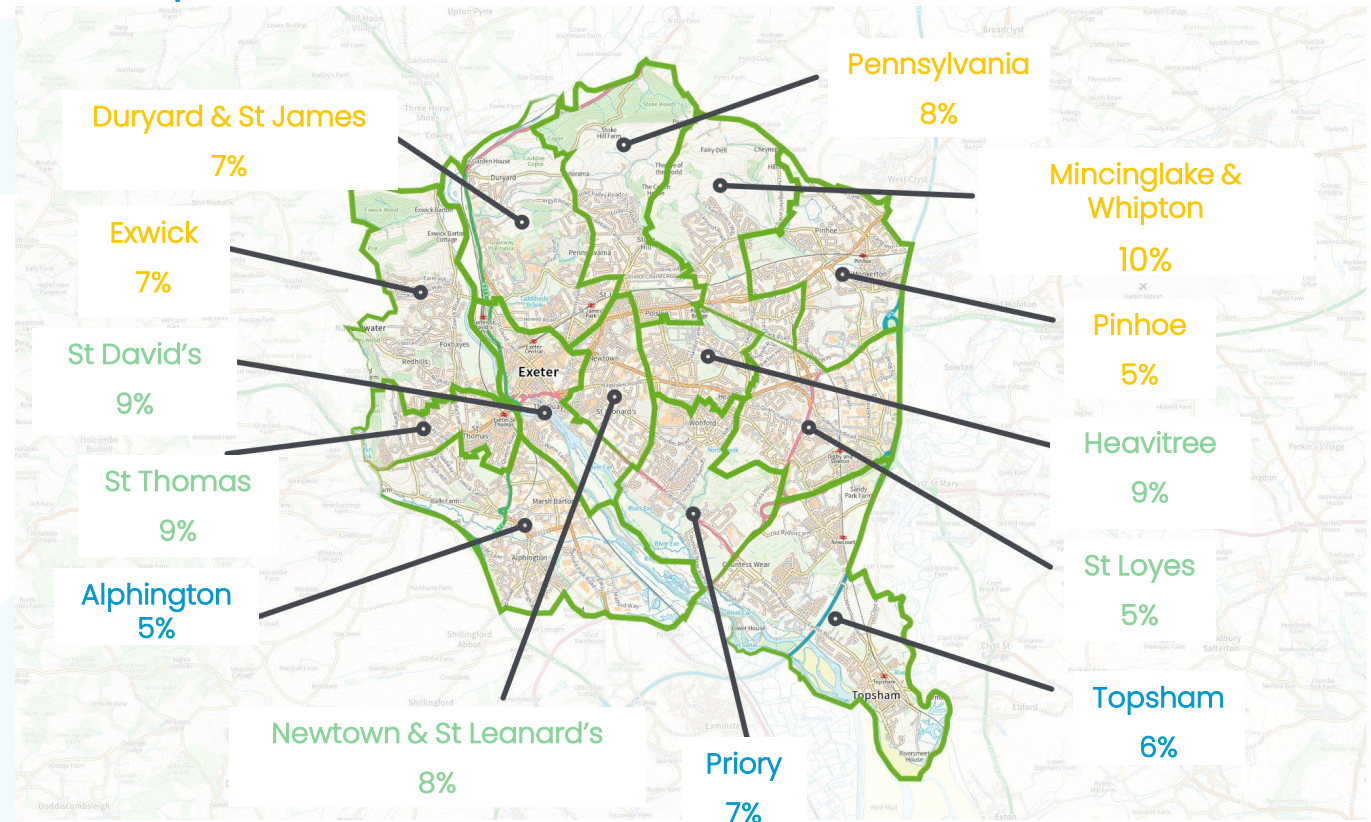
Respondent profile

03.

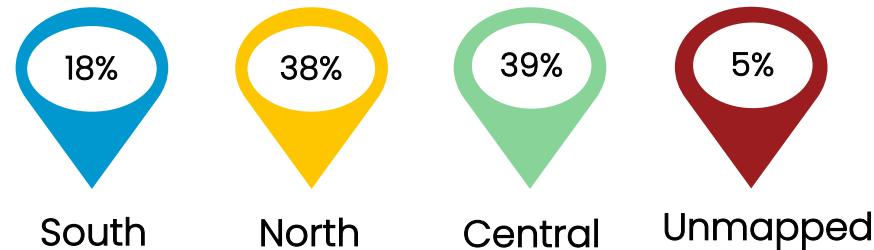
Interviewer led respondent location

Postcodes were collected in the survey to map responses to ward and area within the local authority area. Quotas were set on area. Some postcodes could not be mapped (5%).

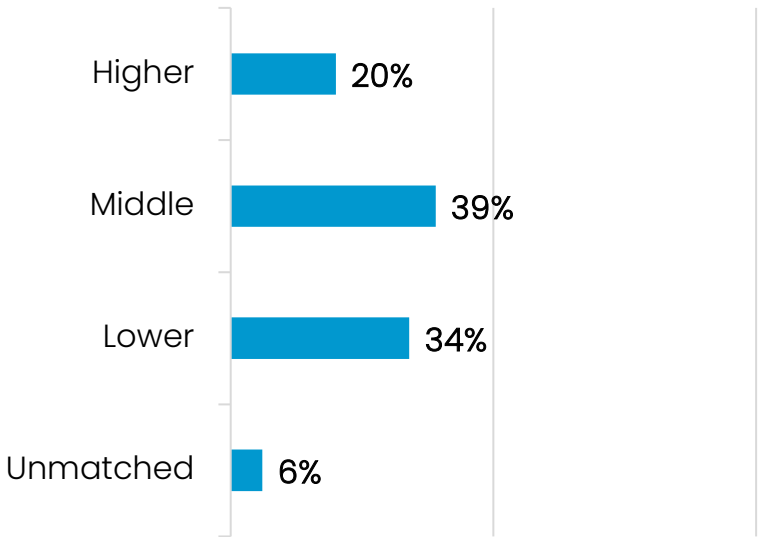
Wards respondents lived in



Areas respondents lived in



Deprivation levels¹

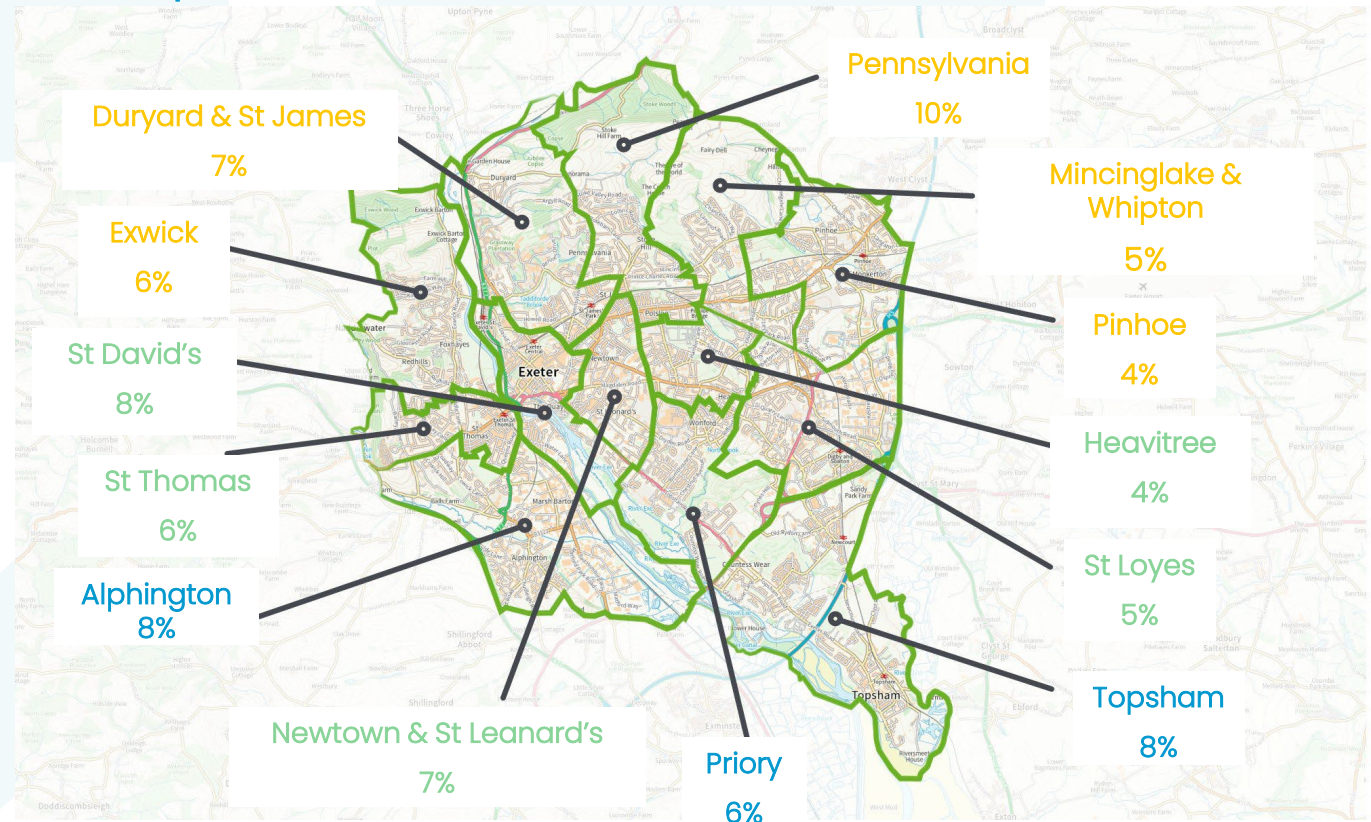


¹Small areas in England are ranked from most deprived to least deprived and divided into 10 equal groups, ranging from most deprived 10 per cent to the least deprived 10 per cent using the latest data from 2019. For analysis IMD deciles were mapped to postcodes and in this report areas of higher deprivation equate to deciles 1-3, middle 4-7 and lower 8-10.

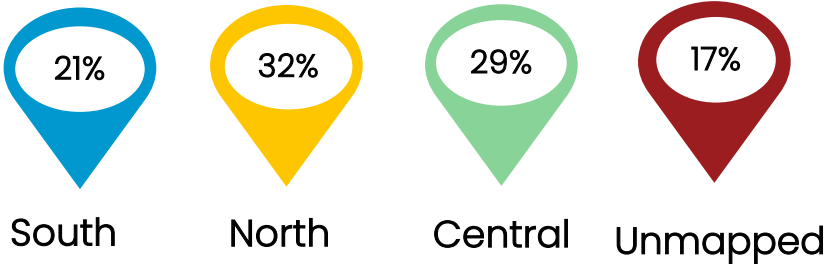
Online survey respondent location

It's important to note that the respondent profile differed in the online self-completion survey. For example, those in the Central area are under-represented in the online response. A larger proportion could also not be mapped (17%).

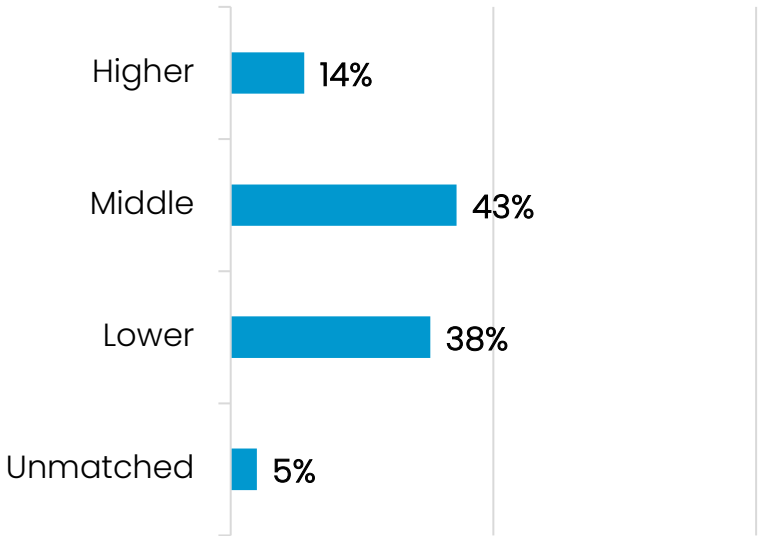
Wards respondents lived in



Areas respondents lived in



Deprivation levels¹



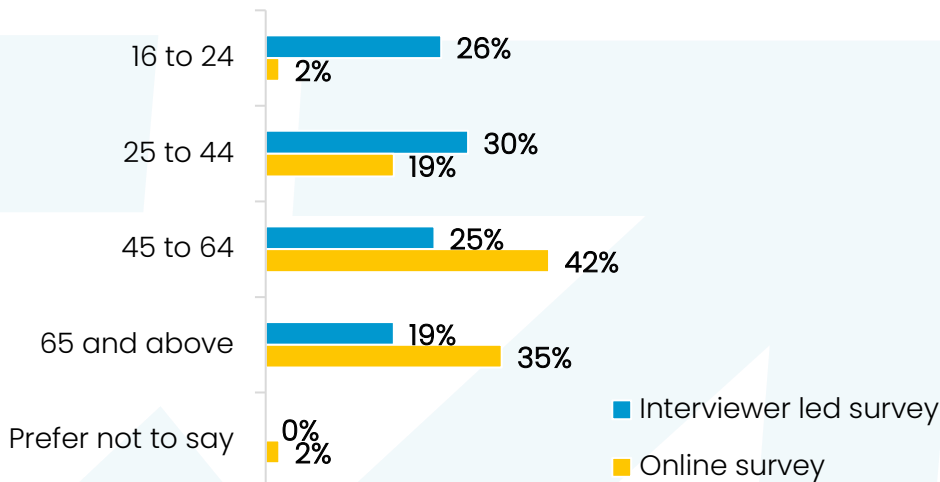
Base: Online survey (597)

¹Small areas in England are ranked from most deprived to least deprived and divided into 10 equal groups, ranging from most deprived 10 per cent to the least deprived 10 per cent using the latest data from 2019. For analysis IMD deciles were mapped to postcodes and in this report areas of higher deprivation equate to deciles 1-3, middle 4-7 and lower 8-10.

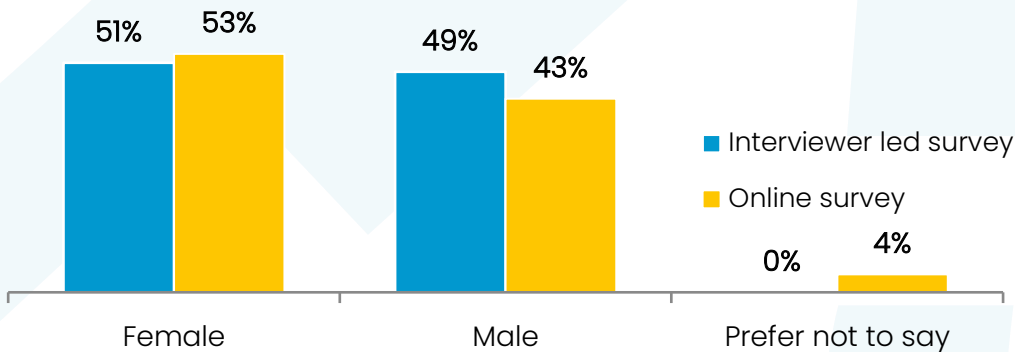
Demographics

Quotas were set on age group and sex for the interviewer led survey. Males and younger age groups were under-represented in the online survey response.

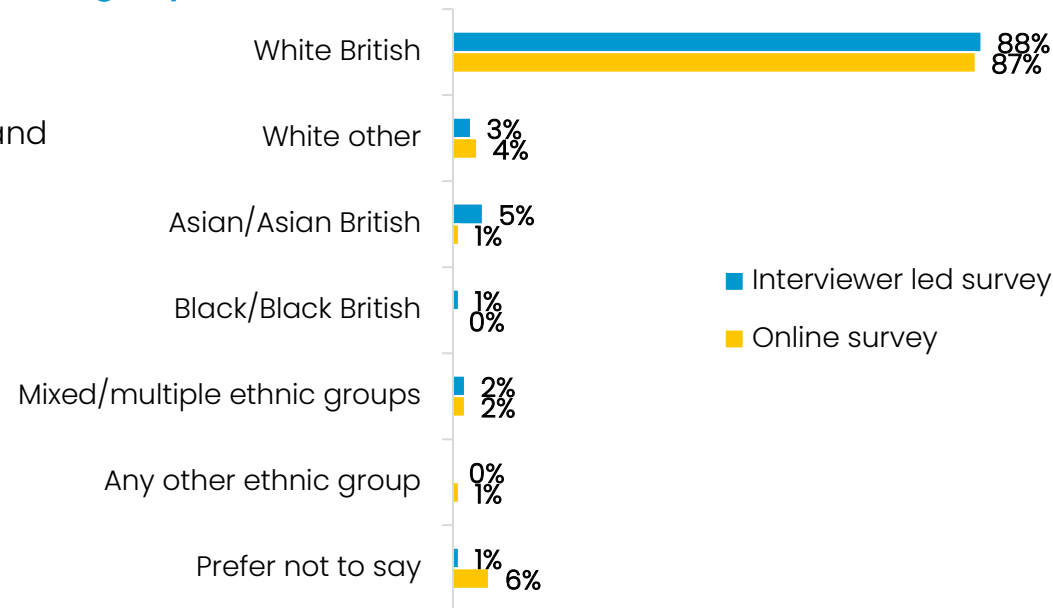
Age group



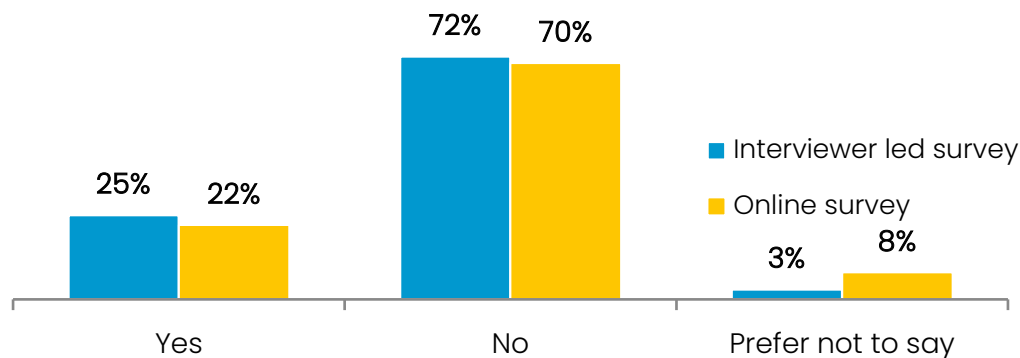
Sex



Ethnic group



Disability and/or long-term health condition(s)



17% were tenants of Council housing services in the interviewer led survey
4% were in the online survey



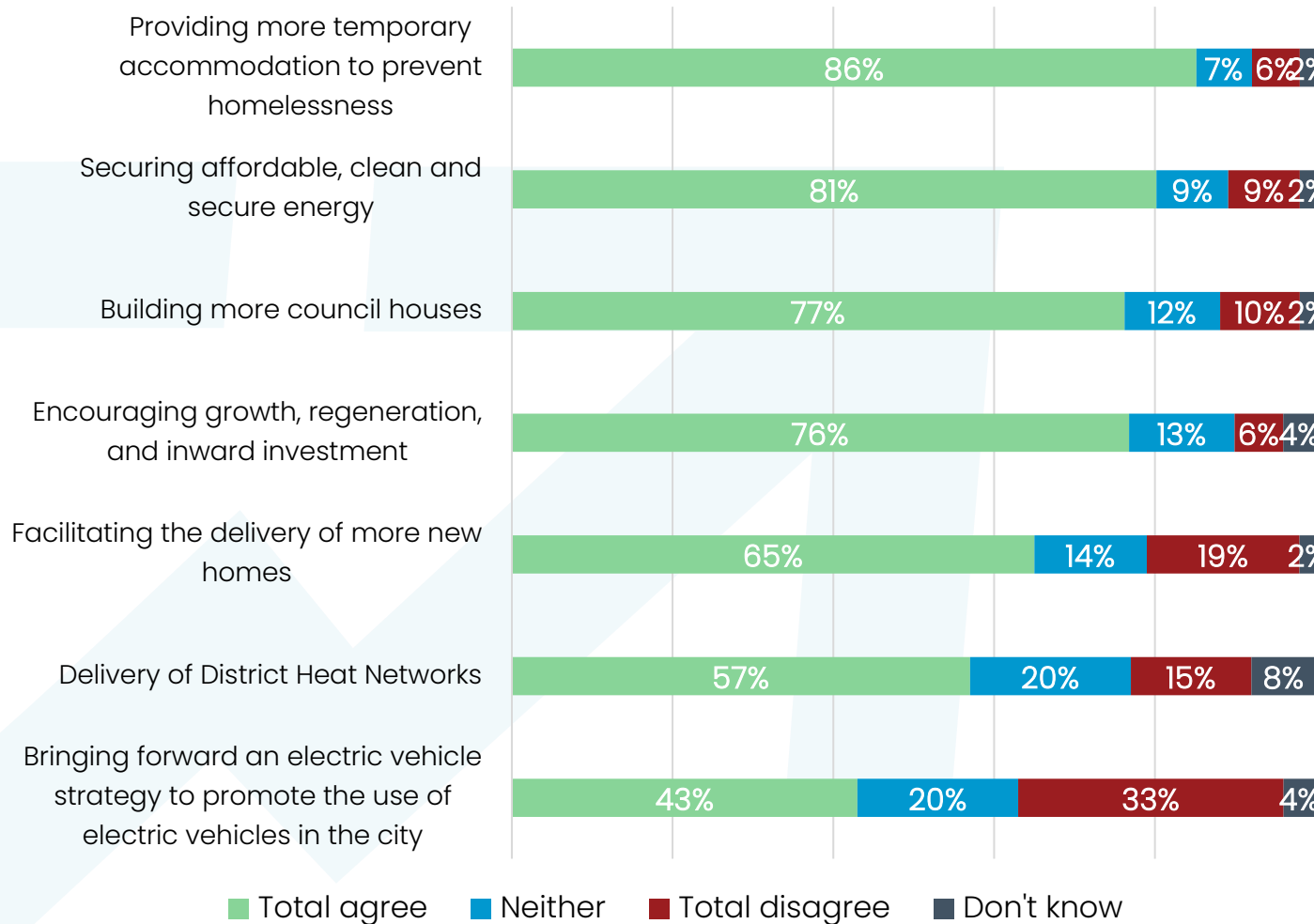
Questions: Please tell me which of the following age bands you fall into | How do you describe your sex? | What is your ethnic group? / Do you consider yourself to have a long-term health condition and/or disability? | Are you a tenant of Exeter City Council housing services? Base: Interviewer led survey (1,101) | Online survey (597)

Council budget for next financial year

04.

What should the Council invest in?

Interviewer led survey results



Respondents in the interviewer led survey were most likely to agree with the Council investing in providing more temporary accommodation to prevent homelessness (86%). This was followed by 81% agreeing with the Council investing in securing affordable, clean and secure energy.

Agreement levels were also high with the Council investing in building more council houses (77%) and encouraging growth, regeneration, and inward investment (76%).

Agreement levels were slightly lower for facilitating the delivery of more new homes (65%) and the delivery of District Heat Networks (57%), although majority proportions still agreed with these.

Agreement was lowest for bringing forward an electric vehicle strategy (43%) and this saw the highest level of disagreement (33%).



Question: How much do you agree or disagree that the council should invest in the following?
Base: Interviewer led survey respondents (1,101)

Variations by subgroups

Interviewer led survey results	Higher agreement	Higher disagreement
Delivery of District Heat Networks	Those aged 25-44 Non-white ethnic minority groups Those who did not have a disability or long-term condition	Those aged 45+ Those living in the Central area Those who had a disability or long-term condition Those living in areas of lower deprivation
Securing affordable, clean and secure energy	Those aged 16-44 Those living in the North area Those who did not have a disability or long-term condition	Those aged 45+ Those living in the Central area
Bringing forward an electric vehicle strategy to promote the use of electric vehicles in the city	Those aged 16-44	Those aged 45+ Those from a White ethnic background Those living in the South and Central areas Those who had a disability or long-term condition
Encouraging growth, regeneration, and inward investment	Those aged 25-44 Those living in the South area	Those aged 65+ Those living in areas of higher deprivation
Building more council houses	Those aged 65+ Those from a White ethnic background Those who had a disability or long-term condition Exeter City Council housing services tenants	No differences
Providing more temporary accommodation to prevent homelessness	Those from a White ethnic background	Those in the Central area
Facilitating the delivery of more new homes	Those aged 25-44 Those in the North area Exeter City Council housing services tenants	Those aged 45+ Those in the South area Those in areas of lower deprivation



Question: How much do you agree or disagree that the council should invest in the following?
Base: Interviewer led survey respondents (1,101)

How did the online survey response differ?

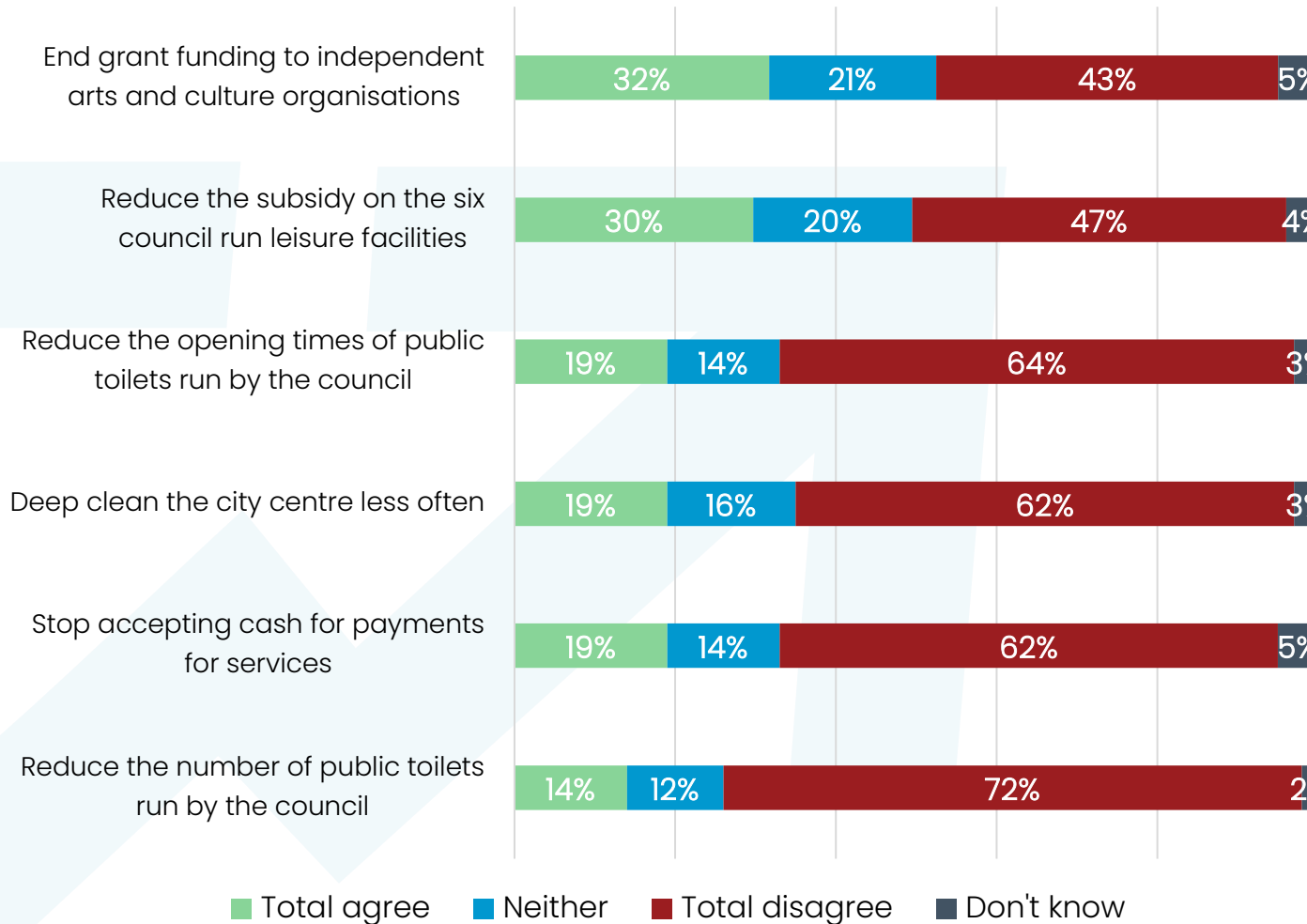
On the whole, online respondents were less likely to agree with each investment and were slightly more likely to say they disagreed with each, with the exception of encouraging growth, regeneration and inward investment.

	Interviewer led survey	Online survey
Providing more temporary accommodation to prevent homelessness		
Total agree	86%	77%
Neither	7%	12%
Total disagree	6%	10%
Don't know	2%	1%
Securing affordable, clean and secure energy		
Total agree	81%	70%
Neither	9%	16%
Total disagree	9%	13%
Don't know	2%	1%
Building more council houses		
Total agree	77%	74%
Neither	12%	13%
Total disagree	10%	12%
Don't know	2%	1%

	Interviewer led survey	Online survey
Encouraging growth, regeneration, and inward investment		
Total agree	76%	80%
Neither	13%	14%
Total disagree	6%	6%
Don't know	4%	1%
Facilitating the delivery of more new homes		
Total agree	65%	49%
Neither	14%	21%
Total disagree	19%	28%
Don't know	2%	1%
Delivery of District Heat Networks		
Total agree	57%	40%
Neither	20%	22%
Total disagree	15%	33%
Don't know	8%	5%
Bringing forward an electric vehicle strategy		
Total agree	43%	39%
Neither	20%	24%
Total disagree	33%	36%
Don't know	4%	1%

How should the Council reduce costs?

Interviewer led survey results



All options saw higher levels of disagreement than agreement. However, agreement was highest for ending grant funding to independent arts and culture organisations (32%), closely followed by reducing the subsidy on the six council run leisure facilities (30%).

On the other hand, disagreement was highest with reducing the number of public toilets run by the council (72%), followed by reducing the opening times of public toilets run by the council (64%).

Six in ten (62%) disagreed with deep cleaning the city centre less often compared with 19% who agreed. Six in ten (62%) also disagreed with stopping accepting cash for payments for services, compared with 19% who agreed.



Question: How much do you agree or disagree that the council should do the following to reduce costs?
Base: Interviewer led survey respondents (1,101)

Variations by subgroups

Interviewer led survey results	Higher agreement	Higher disagreement
Reduce the subsidy on the six council run leisure facilities	Those aged 65+ Females Non-white ethnic minority groups Exeter City Council housing services tenants	Those aged 25-44 Males Those from a White ethnic background Those who did not have a disability or long-term condition Those in areas of lower deprivation
Reduce the number of public toilets run by the council	No differences	Those aged 45+ Those living in the North area Those from a White ethnic background Those who had a disability or long-term condition
Reduce the opening times of public toilets run by the council	Those aged 45+ Those in the South area	Those aged 25-44 Those in the North and Central areas Those who were not Exeter City Council housing services tenants
Deep clean the city centre less often	Those aged 65+ Those in the South area Those who had a disability or long-term condition	Those aged 16-24 Those living in the North area
Stop accepting cash for payments for services	Those in the South and Central areas	Those in the North area Those from a White ethnic background Those in areas of lower deprivation
End grant funding to independent arts and culture organisations	Those aged 25+ Males Those in the South area Those who had a disability or long-term condition	Those aged 16-24 Females Those in areas of neither higher nor lower deprivation



Question: How much do you agree or disagree that the council should do the following to reduce costs?
Base: Interviewer led survey respondents (1,101)

How did the online survey response differ?

Like in the interviewer led survey, online respondents were more likely to disagree than agree with each option to reduce costs. They were also more likely to disagree with each option than those in the interviewer led survey, with the exception of stopping cash for payments for services, where they were more likely to agree.

	Interviewer led survey	Online survey
End grant funding to independent arts and culture organisations		
Total agree	32%	23%
Neither	21%	17%
Total disagree	43%	60%
Don't know	5%	1%
Reduce the subsidy on the six council run leisure facilities		
Total agree	30%	31%
Neither	20%	17%
Total disagree	47%	51%
Don't know	4%	1%
Reduce the opening times of public toilets run by the council		
Total agree	19%	15%
Neither	14%	15%
Total disagree	64%	69%
Don't know	3%	1%

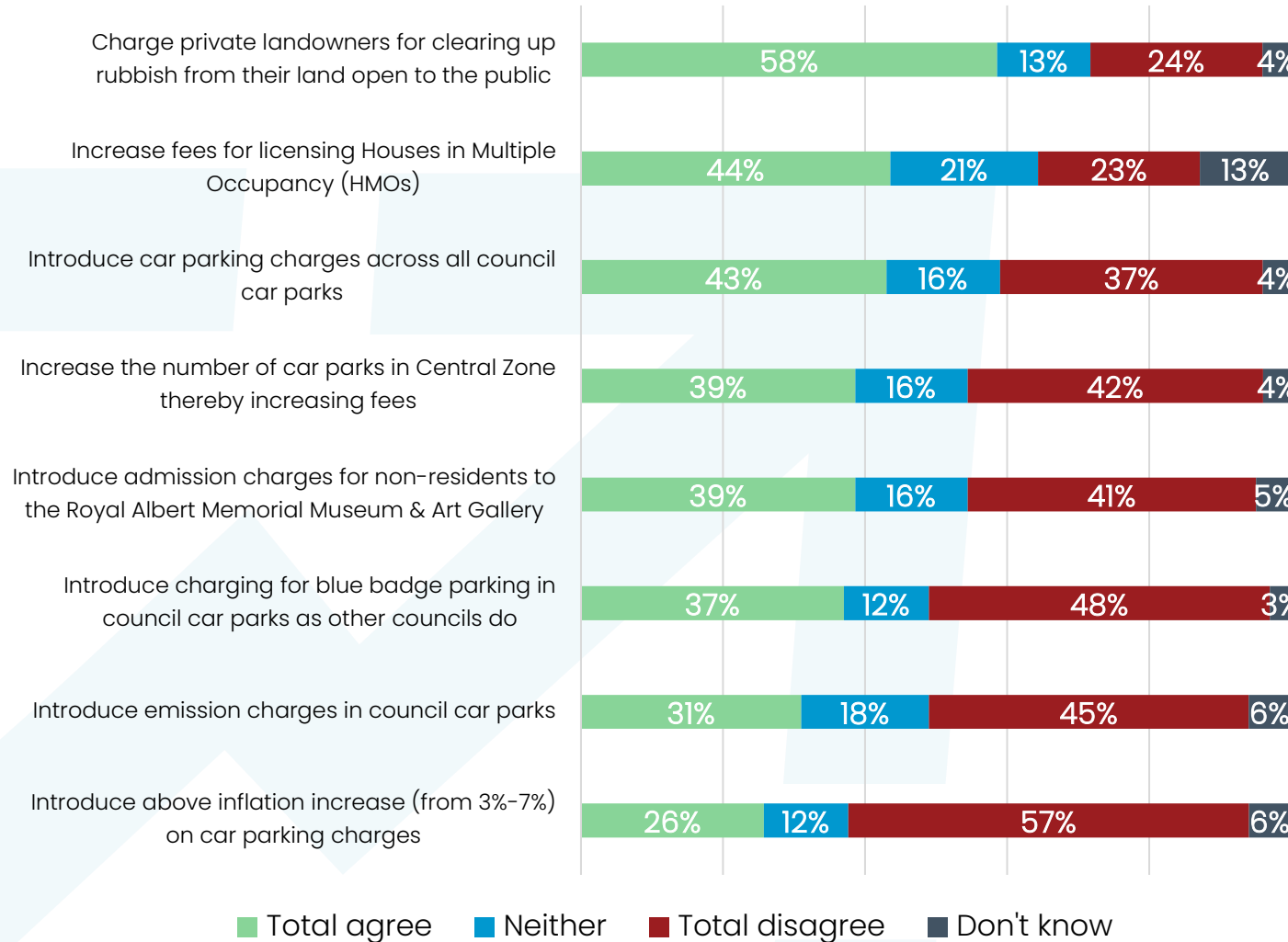
	Interviewer led survey	Online survey
Deep clean the city centre less often		
Total agree	19%	15%
Neither	16%	16%
Total disagree	62%	67%
Don't know	3%	2%
Stop accepting cash for payments for services		
Total agree	19%	24%
Neither	14%	21%
Total disagree	62%	53%
Don't know	5%	2%
Reduce the number of public toilets run by the council		
Total agree	14%	10%
Neither	12%	7%
Total disagree	72%	83%
Don't know	2%	0%



Question: How much do you agree or disagree that the council should do the following to reduce costs?
Base: Interviewer led survey respondents (1,101); Online survey respondents (597)

How should the Council raise money?

Interviewer led survey results



In regard to ways to raise money, agreement was highest for charging private landowners for clearing up rubbish from their land open to the public (58%).

There was also some support for increasing fees for licensing HMOs, with 44% agreeing.

A slightly larger proportion agreed with introducing car parking charges across all council car parks (43%) than disagreed (37%).

Disagreement was slightly higher than agreement for increasing the number of car parks in the Central Zone (42% compared with 39%) and for introducing admission charges for non-residents to the Royal Albert Memorial Museum & Art Gallery (41% compared with 39%).

Almost half (48%) disagreed with introducing charging for blue badge parking in council car parks, whilst 37% agreed.

Around four in ten (45%) disagreed with introducing emission charges in council car parks, a larger proportion than agreed (31%).

Disagreement was highest with introducing an above inflation increase on car parking charges (57%).



Question: How much do you agree or disagree that the council should do the following to raise money?
 Base: Interviewer led survey respondents (1,101)

Variations by subgroups

Interviewer led survey results	Higher agreement	Higher disagreement
Increase fees for licensing Houses in Multiple Occupancy (HMOs)	Those aged 25+ Those who had a disability or long-term condition	Those aged 16-24
Introduce above inflation increase (from 3%-7%) on car parking charges	Those aged 25-44 Males Those in the Central area	Those aged 45+ Females Those who had a disability or long-term condition
Increase the number of car parks in Central Zone thereby increasing fees	Males Those in the South area	Those aged 45+ Females Those from a White ethnic background Those living in areas of lower deprivation
Charge private landowners for clearing up rubbish from their land open to the public	Those aged 45+ Those who had a disability or long-term condition	Those aged 25-44 Males Those from a White ethnic background
Introduce charging for blue badge parking in council car parks as other councils do	Those aged 25-44 Males Those from a White ethnic background	Those aged 45+ Females Those who had a disability or long-term condition Exeter City Council housing services tenants Those in areas of higher deprivation
Introduce emission charges in council car parks	Those aged 16-24	Those aged 45-64 Those from a White ethnic background
Introduce car parking charges across all council car parks	Those aged 25-44 Males	Those aged 45+ Exeter City Council housing services tenants
Introduce admission charges for non-residents to the RAMM	Those aged 65+ Those who had a disability or long-term condition	Those aged 16-44 Those living in areas of lower deprivation



Question: How much do you agree or disagree that the council should do the following to raise money?
Base: Interviewer led survey respondents (1,101)

How did the online survey response differ?

For many measures, online respondents were more likely to agree. The exceptions were increasing the number of car parks and introducing admission charges for non-residents to the Royal Albert Memorial Museum and Art Gallery.

	Interviewer led survey	Online survey
Charge private landowners for clearing up rubbish from land open to public		
Total agree	58%	70%
Neither	13%	13%
Total disagree	24%	15%
Don't know	4%	3%
Increase fees for licensing Houses in Multiple Occupancy (HMOs)		
Total agree	44%	68%
Neither	21%	15%
Total disagree	23%	14%
Don't know	13%	4%
Introduce car parking charges across all council car parks		
Total agree	43%	48%
Neither	16%	16%
Total disagree	37%	34%
Don't know	4%	2%
Increase the number of car parks in Central Zone thereby increasing fees		
Total agree	39%	29%
Neither	16%	19%
Total disagree	42%	50%
Don't know	4%	2%

	Interviewer led survey	Online survey
Introduce admission charges for non-residents to the RAMM		
Total agree	39%	39%
Neither	16%	15%
Total disagree	41%	44%
Don't know	5%	2%
Introduce charging for blue badge parking in council car parks		
Total agree	37%	51%
Neither	12%	13%
Total disagree	48%	34%
Don't know	3%	1%
Introduce emission charges in council car parks		
Total agree	31%	35%
Neither	18%	16%
Total disagree	45%	48%
Don't know	6%	2%
Introduce above inflation increase (from 3%-7%) on car parking charges		
Total agree	26%	33%
Neither	12%	11%
Total disagree	57%	55%
Don't know	6%	0%



Q: How much do you agree or disagree that the council should do the following to raise money?
Base: Interviewer led survey respondents (1,101) ; Online survey respondents (597)

Other actions to raise or to save money

Respondents were asked to suggest other actions that the Council could take to save or raise money. Comments were thematically analysed, and shown below are the ten most common themes in both survey types.

In both survey types the most common theme focused on not wasting money, spending it wisely, finding efficiency and getting things right the first time. The second most common theme in both centred around reducing staff costs (in particular management).

Ten most common themes in interviewer led survey	Count
Don't waste money/spend wisely/more efficiency/do things right first time	65
Reduce staff costs/wages/fewer staff/management	44
Fundraising activities/charity events	36
More events/activities/chargeable events	26
Fewer councillors/reduce expenses	17
Fairer tax/tax the rich more/ensure all pay what is owed	17
Fewer cycle lanes/reduce spending on cycling	16
Revitalise town centre/fill empty shops/reduce rents	15
Less focus on students/no more student accommodation	14
Maintain roads/pavements/fix potholes	14

Ten most common themes in online survey	Count
Don't waste money/spend wisely/more efficiency/do things right first time	44
Reduce staff costs/wages/fewer staff/management	37
Affordable/improved public transport	22
Congestion charge/discourage car use	21
More street cleaning/general maintenance	15
Cheaper parking/don't increase cost of parking	15
Sell/rent out/repurpose unused buildings	14
More car parks/parking/park and ride	13
Increase parking charges/charge for blue badges	13
More charges/regulation for landlords	13



Question: In your opinion, what other actions could the council take to save money or raise money?
Base: Interviewer led survey respondents (445); Online survey respondents (215)



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