# North Sydney Council

**Community Satisfaction Research 2023**

# Report Outline

micromex research

# Research Objectives

In August 2023, North Sydney Council commissioned Micromex Research to conduct a random telephone survey with 400 residents and 200 businesses in the North Sydney local government area (LGA).

**Why?**

- Measure level of satisfaction with Council's performance as well as engagement and communications from residential and commercial angles

- Assess level of satisfaction with Council's services, facilities and activities

- Assess community wellbeing including quality of life and sense of community

- Measure awareness of Precinct Committees, Streetscape Committees and satisfaction with Strategic Direction

- Understand and identify community and business priorities for North Sydney Council LGA in the future

**How?**

- Telephone survey (landline and mobile) to N=401 residents and N=202 businesses

- We use a 5 point scale (e.g. 1 = not at all satisfied, 5 = very satisfied)

- Greatest margin of error +/- 4.8% for residential survey and +/- 6.8% for business survey

**When?**

- Implementation: Resident 7th – 27th August, Business 10th August – 23rd August 2023

# Methodology and Sample

## Sample selection and error

### Residential Survey

A total of 401 resident interviews were completed. 354 of the 401 respondents were chosen by means of a computer based random selection process using the Australian marketing lists, SamplePages and Leads lists. The remaining 47 respondents were 'number harvested' via face-to-face intercept at several locations around the North Sydney LGA, i.e. Waverton Station and St Leonards Train Station.

A sample size of 401 residents provides a maximum sampling error of plus or minus 4.8% at 95% confidence. This means that if the survey was replicated with a new universe of N=401 residents, 19 times out of 20 we would expect to see the same results, i.e. +/- 4.8%. For the survey under discussion the greatest margin of error is 4.8%. This means, for example, that an answer such as 'yes' (50%) to a question could vary from 45% to 55%.

### Business Survey

A total of 202 resident interviews were completed. All of the 202 respondents were chosen by means of a computer based random selection process using the Australian marketing lists and SamplePages.

A sample size of 202 residents provides a maximum sampling error of plus or minus 6.8% at 95% confidence. This means that if the survey was replicated with a new universe of N=202 residents, 19 times out of 20 we would expect to see the same results, i.e. +/- 6.8%. For the survey under discussion the greatest margin of error is 6.8%. This means, for example, that an answer such as 'yes' (50%) to a question could vary from 43% to 57%.

## Interviewing

Interviewing was conducted in accordance with The Research Society Code of Professional Behaviour.

## Data analysis

The data within this report was analysed using Q Professional.

Within the report, blue and red font colours are used to identify statistically significant differences between groups, i.e., gender, age, etc.

Significance difference testing is a statistical test performed to evaluate the difference between two measurements. To identify the statistically significant differences between the groups of means, 'One-Way Anova tests' and 'Independent Samples T-tests' were used. 'Z Tests' were also used to determine statistically significant differences between column percentages.

Note: All percentages are calculated to the nearest whole number and therefore the total may not exactly equal 100%.

## Ratings questions

The Unipolar Scale of 1 to 5 was used in all rating questions, where 1 was the lowest importance or satisfaction and 5 the highest importance or satisfaction (scale of 1 to 7 was only used as reference).
This scale allowed us to identify different levels of importance and satisfaction across respondents.

**Top 2 (T2) Box:** refers to the aggregate percentage (%) score of the top two scores for importance. (i.e. important & very important) **Top 3 (T3) Box:** refers to the aggregate percentage (%) score of the top three scores for satisfaction or support. (i.e. somewhat satisfied, satisfied & very satisfied)

***Note:*** *Only respondents who rated services/facilities a 4 or 5 in importance were asked to rate their satisfaction with that service/facility.*

We refer to T3 Box Satisfaction in order to express moderate to high levels of satisfaction in a non-discretionary category. We only report T2 Box Importance in order to provide differentiation and allow us to demonstrate the hierarchy of community priorities.

## Micromex LGA Benchmark

Micromex has developed Community Satisfaction Benchmarks using normative data from 75 unique councils, more than 175 surveys and over 93,000 interviews since 2012.

# Sample Profile: Residents

## Gender

Female 54%
Male 46%

## Age

- 31% 18-34
- 28% 35-49
- 13% 50-59
- 27% 60+

## Ratepayer status

Ratepayer 63%
Non-ratepayer 34%
Other 3%

## Time lived in the area

- Under a year 5%
- 1 to 3 years 12%
- 4 to 6 years 9%
- 7 to 10 years 14%
- Over 10 years 59%

## Household type

- Living alone 24%
- Single parent with Children 5%
- Married/de facto with no children 33%
- Married/de facto with children 22%
- Living at home with parents 8%
- Group/shared Household 4%
- Extended family household (multiple generations) 3%

## Suburb

- Waverton 14%
- Wollstonecraft 14%
- Cremorne 13%
- Crows Nest 11%
- Neutral Bay 11%
- Cammeray 10%
- North Sydney 9%
- Kirribilli 6%
- St Leonards 3%
- McMahons Point 2%
- Cremorne Point 2%
- Lavender Bay 2%
- Kurraba Point 1%
- Milsons Point 1%

## Main Local shopping area

- Crows Nest 43%
- Neutral Bay 26%
- North Sydney 15%
- Cammeray 9%
- Kirribilli 5%
- Cremorne 2%

The sample was weighted by age and gender to reflect the 2021 ABS Census data for North Sydney.

# Sample Profile: Business

## Gender

Female 46%

Male 54%

Prefer not to say <1%

## Number of employees

- 10% No employees/sole trader
- 50% 1-5 employees
- 20% 6-10 employees
- 7% 11-20 employees
- 12% More than 20 employees

## Type of business

| Type | % |
|---|---|
| Property and business services | 21% |
| Health and community services | 19% |
| Retail trade | 15% |
| Accommodation, cafes, and restaurants | 9% |
| Finance and insurance | 8% |
| Personal and other services | 6% |
| Construction | 6% |
| Cultural and recreational | 5% |
| Wholesale trade | 3% |
| Manufacturing | 3% |
| Transport and storage | <1% |
| Education | <1% |
| Other | 2% |

## Location of business

| Location | % |
|---|---|
| North Sydney | 35% |
| Crows Nest | 19% |
| Neutral Bay | 13% |
| St Leonards | 12% |
| Cammeray | 4% |
| Cremorne | 4% |
| Milsons Point | 4% |
| Kirribilli | 4% |
| McMahons Point | 2% |
| Wollstonecraft | 1% |
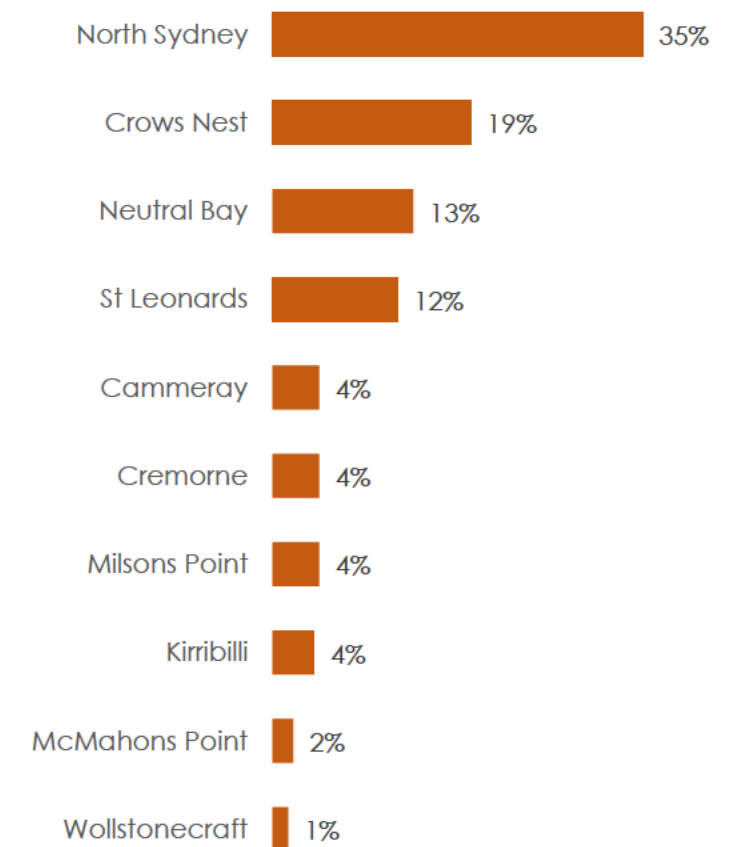
# Summary Findings

# Where are we now? – Resident

Despite many external stressors over recent years, out of the control of Council (such as the impacts of Covid, bushfires, floods and rising costs), the performance of Council in the eyes of the community remains relatively consistent with previous years and the perceived quality of life living in the North Sydney LGA remains high.

Based on our regression analysis, customer service/information provided by Council is the key contributor towards overall satisfaction, followed by maintenance of footpaths and waste/recycling collection services. Development and planning is another area of focus for Council to lift satisfaction.

# Key Measures:

**92%**

### Overall Satisfaction

Overall, 92% of residents are at least somewhat satisfied with the performance of Council over the last 12 months.

**97%**

### Quality of Life in the LGA

97% of respondents felt that their quality of life was good to excellent within the North Sydney Council area.

**64%**

### Sense of Community

64% of residents agree that North Sydney as a whole had a strong sense of community.

### Most Valued Aspects

Proximity to CBD/city, open spaces/parks/trees and a good public transport system are the top 3 most valued aspects living in North Sydney.

# Summary Focus Areas – Resident

## Development & Planning

- 27% stated overdevelopment was a priority area of focus for the next 10 years
- Building heights and diversity of development is important

## Traffic & Transport

- 25% stated traffic management/congestion was a priority focus area
- 10% thought public transport needs to be improved

## Environment

- 17% stated the preservation of green spaces and bushland is a priority
- Environmental sustainability and climate change was identified as a priority area by 15% of residents
- Waste and recycling was the 3rd highest driver of overall satisfaction

## Services & Facilities

- 17% stated better service and facilities (e.g. hospitals, schools, pools) need to be provided
- Maintenance of footpaths and roads is an area for improvement

## Key Areas of Focus

## Housing

- 12% stated housing affordability & availability is a challenge for them

## Council

- Customer service is the key driver of overall satisfaction
- 12% thought Council action e.g. rates, customer service and funds needs to be improved

# Where are we now? – Business

Similarly, the performance of Council in the eyes of the businesses remains in line with previous years and satisfaction with the business environment in the North Sydney LGA remains high.

Based on our regression analysis, customer service/information provided by Council is again the key contributor towards overall satisfaction of Council's performance. Every interaction with Council is an opportunity to listen, consider, respond and increase satisfaction levels.  Parking, development and planning and communication/consultation with businesses are areas to continue efforts to improve satisfaction of businesses in the LGA.

## Key Measures:

**89%**

### Overall Satisfaction

Overall, 89% of Businesses are at least somewhat satisfied with the performance of Council over the last 12 months.

**79%**

### Doing Business in North Sydney

92% of businesses are at least somewhat satisfied with North Sydney as a place to do business.

**49%**

### Satisfaction with Strategic Direction

49% of businesses are satisfied with North Sydney's strategic direction.

# Summary Focus Areas – Business

## Support for Local Business

- Communication and consultation with local businesses was identified as an area for improvement
- 11% stated that support for local businesses e.g. incentives, policies and face to face consultations need to be focused on as a priority area for the next 10 years
- Appearance of public spaces in the CBD is the 2nd highest driver for overall satisfaction

## Traffic & Parking

- 29% of businesses stated that traffic management/congestion and parking availability/affordability needs to be prioritised in the next 10 years
- Satisfaction was lowest overall for the provision of parking

## Key Areas of Focus

## Development & Planning

- 15% stated more development management needs to be provided
- Long term planning is the 3rd biggest driver of overall satisfaction
- Managing development/town planning and long term planning were in the top 4 biggest performance gaps

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# Satisfaction Scorecard – Resident & Business

20 of the 28 services/facilities for residents and 9 of the 16 services/facilities for businesses received 'good performance' scores.

Only 1 area (provision of parking) for businesses had a satisfaction score of 60% or less.

**Good performance**
(T3B sat score ≥80%)

**Monitor**
(T3B sat score 60%-79%)

**Needs improvement**
(T3B sat score <60%)

**NA**

## Infrastructure & Transport

| Resident | Business |
|---|---|
| Cleanliness of local roads and footpaths | Cleanliness of local roads and footpaths |
| Maintenance of local roads | Maintenance of local roads |
| Maintenance of footpaths | Maintenance of footpaths |
| Management of traffic flow (congestion) on local roads (excluding highways | Management of traffic flow (congestion) on local roads (excluding highways) |
| Cycleways | |
| Provision of parking | Provision of parking |
| Maintenance of plazas in commercial areas | Maintenance of plazas in commercial areas |
| Appearance of local village centres | Appearance of local village centres |
| Appearance of public spaces in the North Sydney CBD | Appearance of public spaces in the North Sydney CBD |
| Wharves and boat ramps, dinghy/kayak storage etc | |
| Bus shelters | |

## Open space & Environment

| Resident | Business |
|---|---|
| Recreation facilities and amenities | |
| Maintenance of parks, playgrounds, bushland areas, and recreation areas | |
| Protecting bushland and enhancing canopy cover | |
| Waste and recycling collection services | Waste and recycling collection services |
| Environmental and sustainability initiatives | Environmental and sustainability initiatives |

## Community & Culture
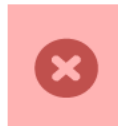
| Resident | Business |
|---|---|
| Stanton Library | |
| Community centres and halls | |
| Council run community events | |
| Feeling safe in North Sydney | |
| Range of arts and cultural experiences in North Sydney | |

## Development

| Resident | Business |
|---|---|
| Managing development/town planning (land use planning) | Managing development/town planning (land use planning) |
| Long term planning | Long term planning |
| Protection of low-rise residential area | |
| Building height and town centres | Building height and town centres |

## Leadership & Customer

| Resident | Business |
|---|---|
| Customer service/information provided by Council staff | Customer service/information provided by Council staff |
| Consultation with the community | Consultation with the business community |
| Communication with residents | Communication with local businesses |

# Section 1a
# (Resident)

Section 1a:

## Living in North Sydney

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# Quality of Life

97% of respondents feel that their quality of life is at least 'good' within the North Sydney Council area. Though it has softened compared to 2020, it is still significantly higher compared to the Group 3 Benchmark.
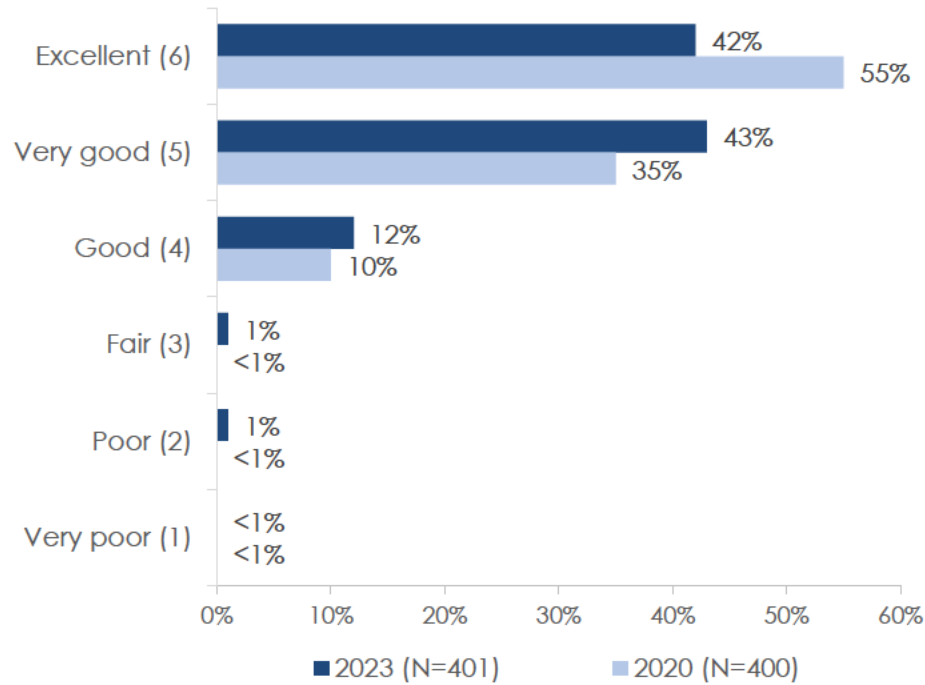


Year on Year Trend

|  | 2023 | 2020 |
| --- | --- | --- |
| Top 3 Box % | 97% | 100% |
| Mean rating | 5.22 | 5.43 |
| Base | 401 | 400 |

|  | North Sydney Council | Micromex LGA **Group 3** Benchmark | Micromex LGA **Metro** Benchmark |
| --- | --- | --- | --- |
| Top 3 Box % | 97% | 94% | 93% |
| Mean rating | 5.22 | 4.97 | 4.92 |
| Base | 401 | 12,368 | 17,469 |

|  | Overall | Gender | | Ward | | Ratepayer Status | |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer/ Other |
| Top 3 Box % | 97% | 96% | 98% | 98% | 96% | 96% | 99% |
| Mean rating | 5.22 | 5.14 | 5.28 | 5.20 | 5.23 | 5.14 | 5.34 |
| Base | 401 | 186 | 215 | 203 | 197 | 252 | 149 |

|  | Age | | | | Time lived in Council area | |
| --- | --- | --- | --- | --- | --- | --- |
|  | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Top 3 Box % | 100% | 98% | 97% | 93% | 99% | 96% |
| Mean rating | 5.38 | 5.19 | 5.13 | 5.10 | 5.23 | 5.20 |
| Base | 125 | 112 | 53 | 110 | 165 | 236 |

Q4. Overall, how would you rate your quality of life living in the North Sydney Council area on a scale from 1-6 where 1 is very poor and 6 is excellent? (Resident)

Scale: 1 = very poor, 6 = excellent
A significantly higher/lower percentage/number by group    14

# Sense of Community

64% of residents agree that North Sydney as a whole has a strong sense of community. Although residents' sense of community continues to soften, it is above the Group 3 Benchmark.

Bar chart – agreement levels:

| Rating | 2023 (N=401) | 2020 (N=400) |
|---|---|---|
| 5 – Strongly agree | 26% | 19% |
| 4 | 38% | 56% |
| 3 | 25% | 14% |
| 2 | 9% | 10% |
| 1 – Strongly disagree | 2% | <1% |

**Year on Year Trend**
T2B% for Sense of Community
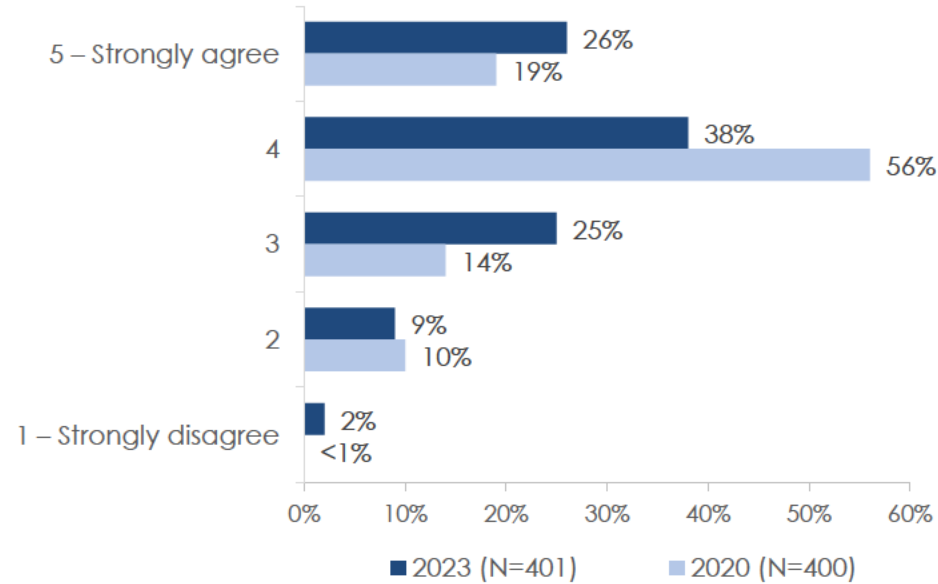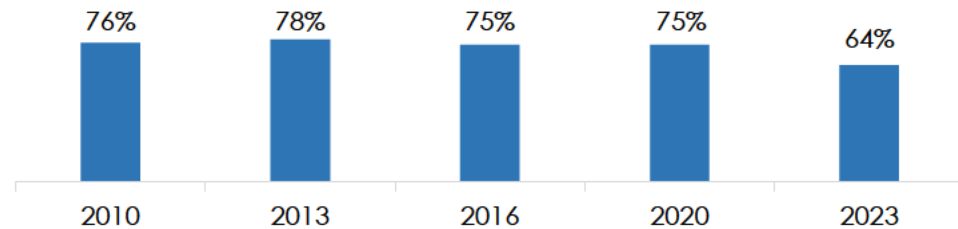
| 2010 | 2013 | 2016 | 2020 | 2023 |
|---|---|---|---|---|
| 76% | 78% | 75% | 75% | 64% |

| | North Sydney Council | Micromex LGA **Group 3** Benchmark | Micromex LGA **Metro** Benchmark |
|---|---|---|---|
| Top 2 Box % | 64% | 61% | 60% |
| Mean rating | 3.77 | 3.66 | 3.66 |
| Base | 401 | 6,966 | 8,450 |

| | Overall | Gender | | Ward | | Ratepayer Status | |
|---|---|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer/ Other |
| Top 2 Box % | 64% | 62% | 65% | 64% | 64% | 63% | 65% |
| Mean rating | 3.77 | 3.72 | 3.82 | 3.75 | 3.79 | 3.72 | 3.87 |
| Base | 401 | 186 | 215 | 203 | 197 | 252 | 149 |

| | Age | | | | Time lived in Council area | |
|---|---|---|---|---|---|---|
| | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Top 2 Box % | 61% | 67% | 53% | 69% | 64% | 64% |
| Mean rating | 3.76 | 3.86 | 3.37 | 3.90 | 3.80 | 3.76 |
| Base | 125 | 112 | 53 | 110 | 165 | 236 |

*Q5. How strongly do you agree or disagree that North Sydney as a whole has a strong sense of community? Please rate on a scale from 1-5, where 1 is strongly disagree and 5 is strongly agree? (Resident)*

Scale: 1 = strongly disagree, 5 = Strongly agree
A significantly higher/lower percentage/number by group

# Most Valued Aspects

Proximity to CBD/City and open spaces/parks/trees remain the top 2 most valued aspects living in North Sydney. Access to public transport has become more valued by residents compared to 2020.



**26%** Close to CBD / City

**21%** Open spaces / Parks / Trees

**Most Valued Aspects**

**10%** Public transport

**8%** Convenience (general)

**7%** Quiet / peaceful / safe

**7%** Services / community facilities

| | 2023 (N=401) | 2020 (N=400) |
|---|---|---|
| Close to CBD/City | 26% | 24% |
| Open spaces/parks/trees etc | 21% | 25% |
| Public transport | 10% | 6% |
| Convenience (general) | 8% | 7% |
| Quiet/peaceful/safe | 7% | 13% |
| Services/community facilities | 7% | 4% |

■ 2023 (N=401)  ■ 2020 (N=400)

Base: N = 401

*Q6a. What do you value MOST about living in the North Sydney Council area? (Resident)*

Please see Appendix 1 for full list of responses

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# Council Engagements

18% of respondents stated that they had participated in at least one Council engagement in the past 12 months. Of those who had participated in Council engagement, the majority attended a Council meeting/precinct discussion.
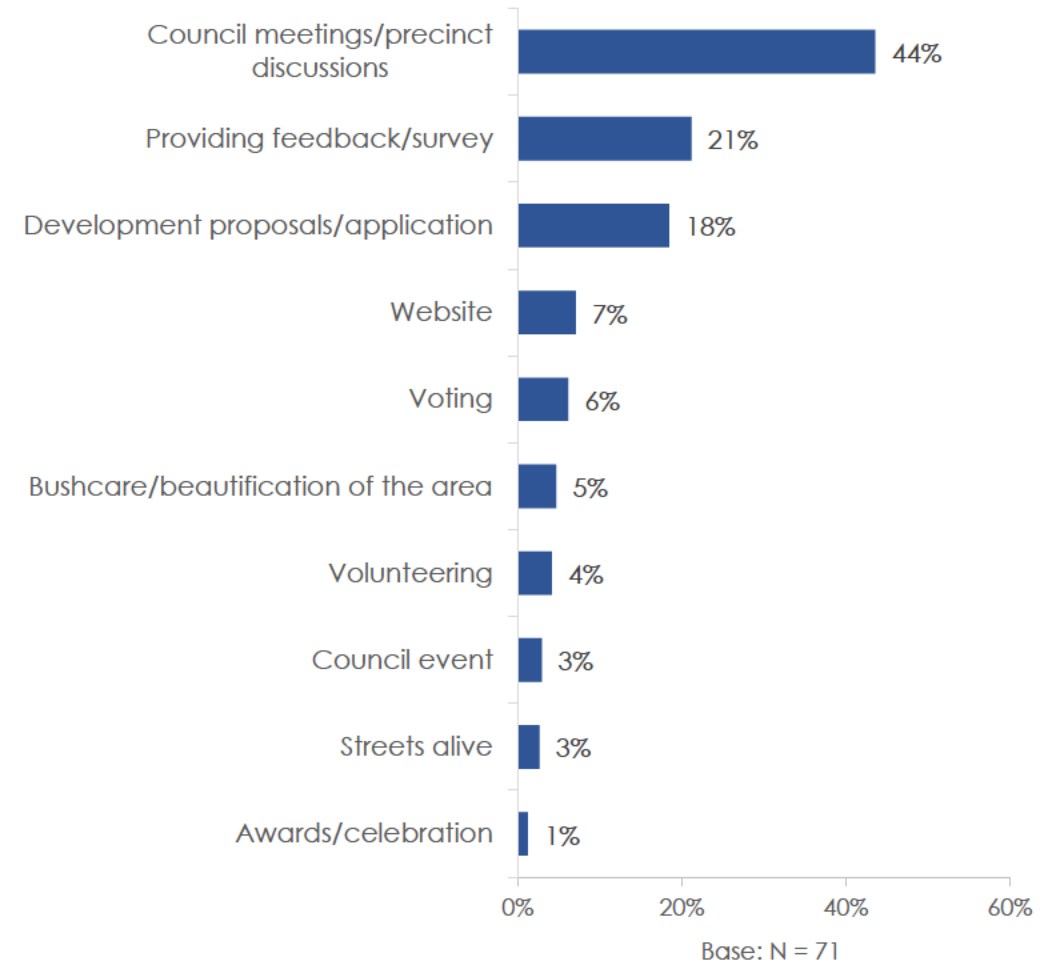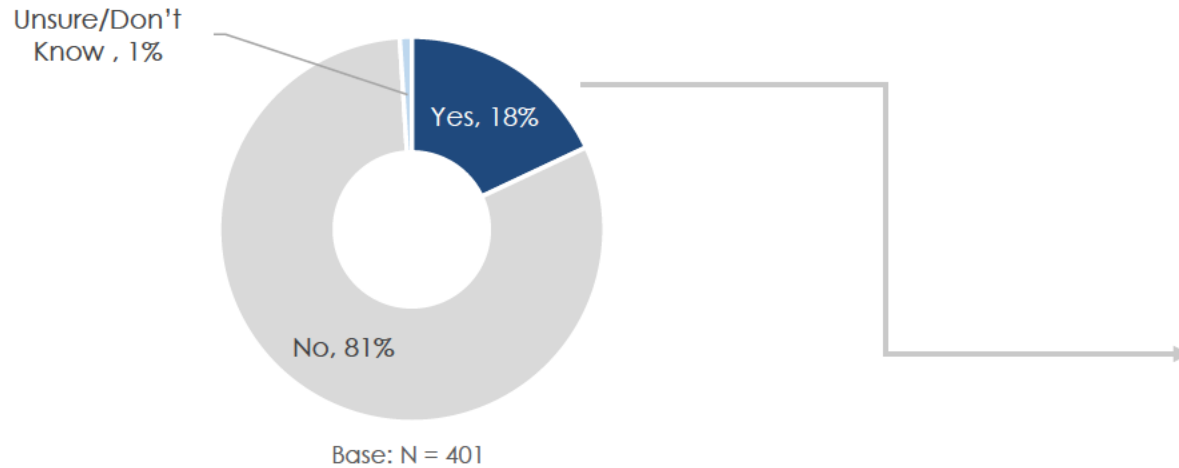
Unsure/Don't Know , 1%

Yes, 18%

No, 81%

Base: N = 401

| | Overall | Gender | | Ward | | Ratepayer Status | |
|---|---|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer /Other |
| Yes | 18% | 15% | 20% | 16% | 19% | 25% | 5% |
| Base | 401 | 186 | 215 | 203 | 197 | 252 | 149 |

| | Age | | | | Time lived in Council area | |
|---|---|---|---|---|---|---|
| | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Yes | 12% | 19% | 10% | 26% | 11% | 23% |
| Base | 125 | 112 | 53 | 110 | 22 | 48 |

Council meetings/precinct discussions — 44%

Providing feedback/survey — 21%

Development proposals/application — 18%

Website — 7%

Voting — 6%

Bushcare/beautification of the area — 5%

Volunteering — 4%

Council event — 3%

Streets alive — 3%

Awards/celebration — 1%

Base: N = 71

Q14a.    Have you participated in any Council engagements in the past 12 months? (Resident)
Q14b.    (If yes) What engagements have you participated in? (e.g. Giving feedback on YourSAy website, workshops or Popup information stalls) (Resident)

A significantly higher/lower percentage by group 17

# Council Run Events

41% of respondents stated that they had participated in at least one Council run event in the past 12 months. Markets are the most commonly attended events, followed by Festivals, Fairs and Coal loader events.
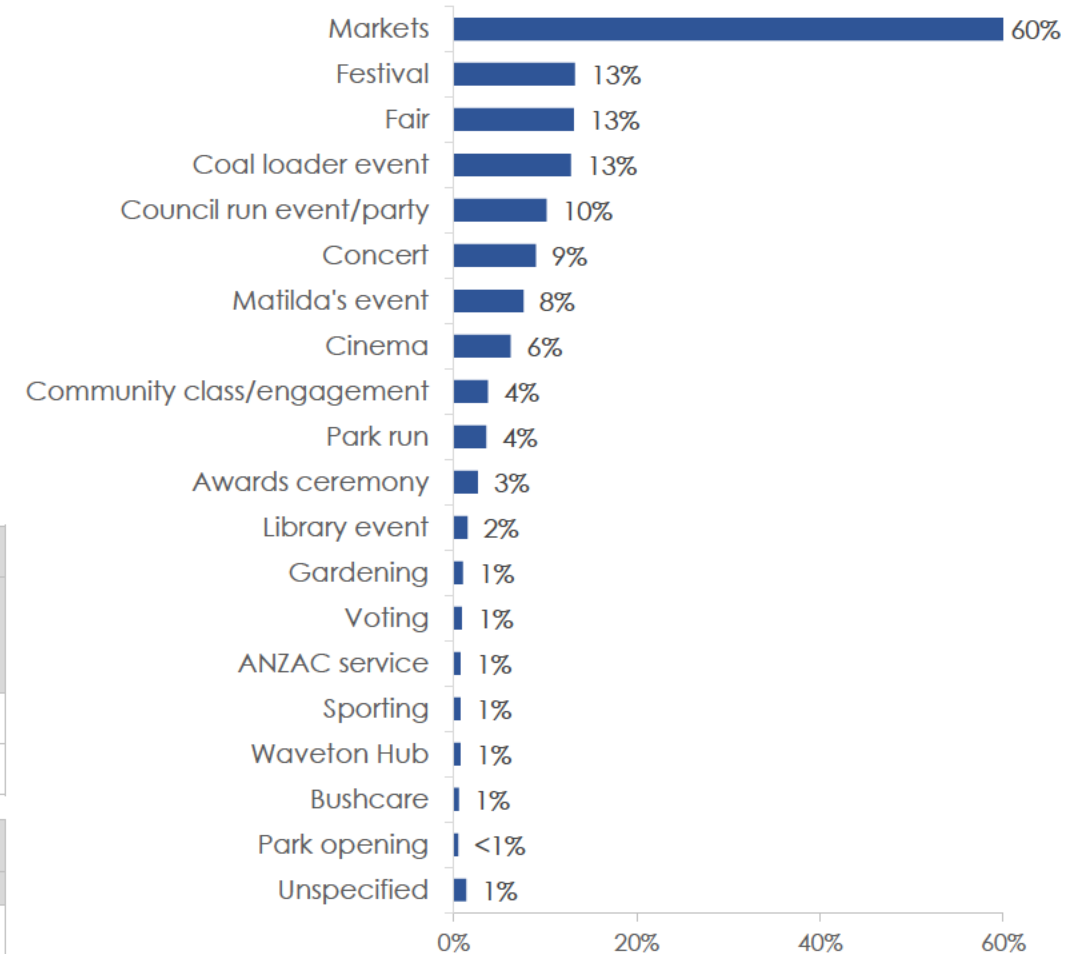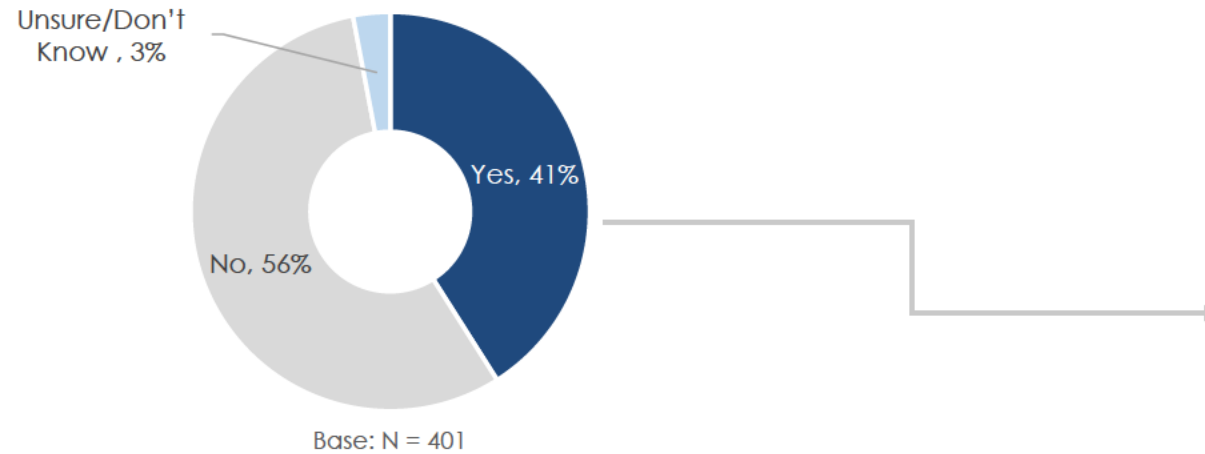
Unsure/Don't Know , 3%

Yes, 41%

No, 56%

Base: N = 401

| | Overall | Gender | | Ward | | Ratepayer Status | |
|---|---|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer/ Other |
| Yes | 41% | 37% | 44% | 39% | 44% | 41% | 41% |
| Base | 401 | 186 | 215 | 203 | 197 | 252 | 149 |

| | Age | | | | Time lived in Council area | |
|---|---|---|---|---|---|---|
| | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Yes | 49% | 45% | 48% | 25% | 42% | 41% |
| Base | 125 | 112 | 53 | 110 | 165 | 236 |

| Event | % |
|---|---|
| Markets | 60% |
| Festival | 13% |
| Fair | 13% |
| Coal loader event | 13% |
| Council run event/party | 10% |
| Concert | 9% |
| Matilda's event | 8% |
| Cinema | 6% |
| Community class/engagement | 4% |
| Park run | 4% |
| Awards ceremony | 3% |
| Library event | 2% |
| Gardening | 1% |
| Voting | 1% |
| ANZAC service | 1% |
| Sporting | 1% |
| Waveton Hub | 1% |
| Bushcare | 1% |
| Park opening | <1% |
| Unspecified | 1% |

Base: N = 165

Q15a. Have you participated in any Council run events in the past 12 months? (Resident)
Q15b.   (If yes) What events have you participated in? (e.g. Village Voice, NRTH SYD activations) (Resident)

A significantly higher/lower percentage by group

# Source of Information – Resident

Email and Council website are the most preferred ways for residents to get information about Council this year. However, brochures/leaflets, Council newsletters and e-newsletters are less preferred compared to 2020*.
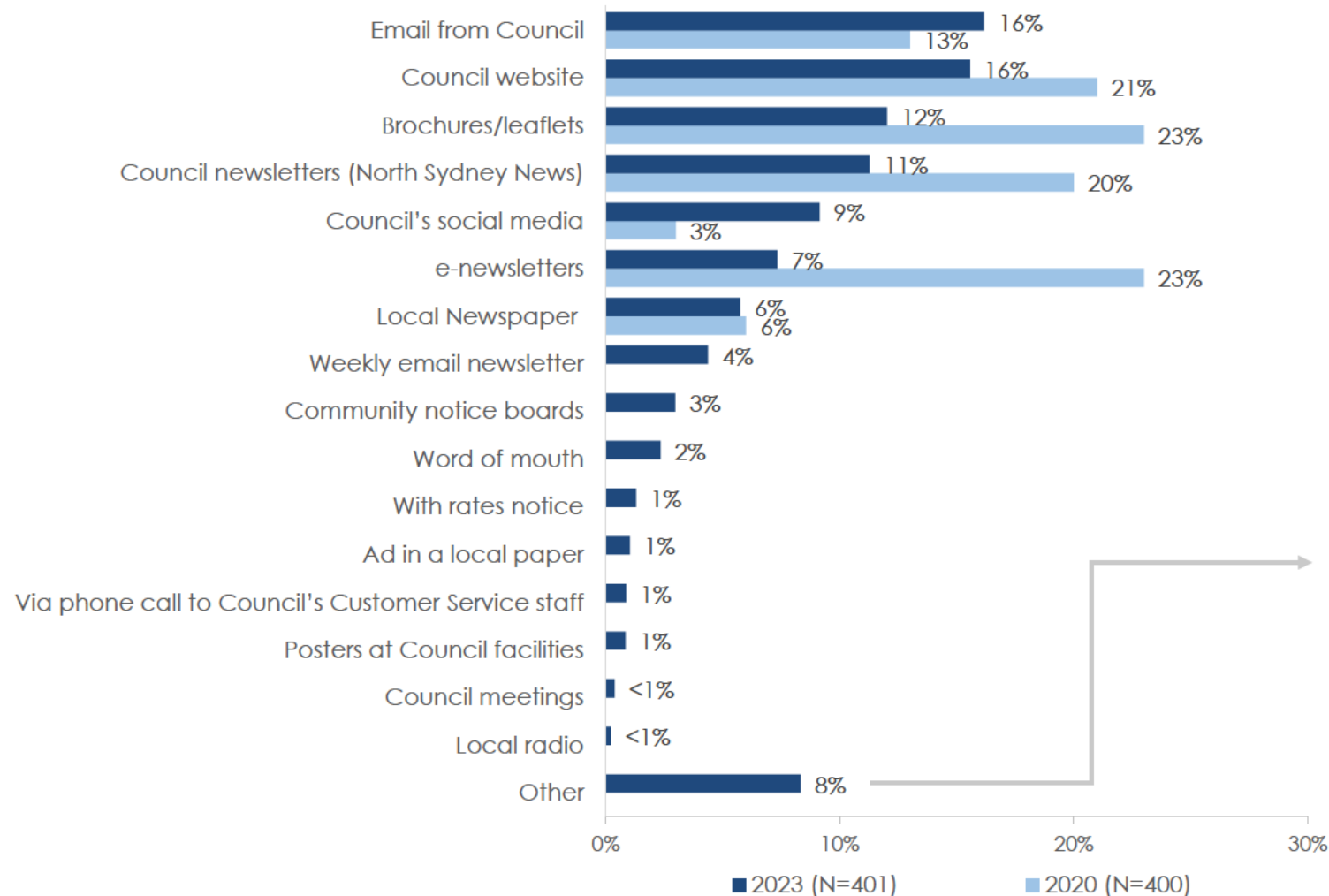


| Other specified | N=401 |
|---|---|
| Mail/Letter | 3% |
| Other social media | 2% |
| In person | <1% |
| Other websites | <1% |
| App | <1% |
| Signs in streets | <1% |
| Nothing | <1% |

Bar chart data:

| Source | 2023 (N=401) | 2020 (N=400) |
|---|---|---|
| Email from Council | 16% | 13% |
| Council website | 16% | 21% |
| Brochures/leaflets | 12% | 23% |
| Council newsletters (North Sydney News) | 11% | 20% |
| Council's social media | 9% | 3% |
| e-newsletters | 7% | 23% |
| Local Newspaper | 6% | 6% |
| Weekly email newsletter | 4% | |
| Community notice boards | 3% | |
| Word of mouth | 2% | |
| With rates notice | 1% | |
| Ad in a local paper | 1% | |
| Via phone call to Council's Customer Service staff | 1% | |
| Posters at Council facilities | 1% | |
| Council meetings | <1% | |
| Local radio | <1% | |
| Other | 8% | |

*Note: New options added this year, 2020 data is shown as an interest point only.

Q16a. What is your preferred source of information relating to what North Sydney Council does? (Resident)

# Attitude Towards Council's Operating Process – Resident

57% of residents agree or strongly agree that Council operates under ethical, open, accountable, and transparent processes, which is in line with 2020.

Younger residents (18-34) are more likely to be positive towards Council's operating process.
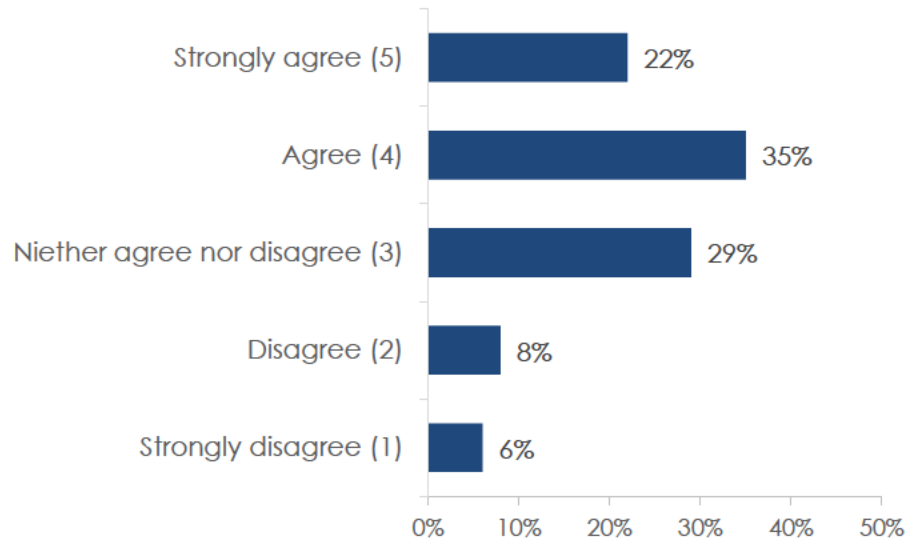


**Year on Year Trend**

| | 2023 | 2020 |
|---|---|---|
| Mean rating | 3.59 | 3.60* |
| Base | 399 | 400 |

| | Overall | Gender | | Ward | | Ratepayer Status | |
|---|---|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer/ Other |
| Top 2 Box % | 57% | 61% | 54% | 56% | 59% | 55% | 61% |
| Mean rating | 3.59 | 3.61 | 3.56 | 3.62 | 3.55 | 3.51 | 3.72 |
| Base | 399 | 186 | 213 | 203 | 196 | 250 | 149 |

| | Age | | | | Time lived in Council area | |
|---|---|---|---|---|---|---|
| | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Top 2 Box % | 70% | 44% | 48% | 60% | 59% | 56% |
| Mean rating | 3.92 | 3.30 | 3.33 | 3.62 | 3.68 | 3.52 |
| Base | 125 | 111 | 53 | 110 | 165 | 235 |

Base: N = 399

Note: *This value was converted and calculated using 5 points scale

Q18. How strongly do you agree or disagree that Council operates under ethical, open, accountable, and transparent processes on a scale from 1-5 where 1 is strongly disagree and 5 is strongly agree?

Scale: 1 = strongly disagree, 5 = Strongly agree
A significantly higher/lower percentage/number by group   20

# Precinct Committees – Resident

45% of residents are aware of precinct committees, which has remained stable since 2016. Ratepayers and older residents/long-term residents know precinct committees better than non-ratepayers and younger residents/short-term residents.
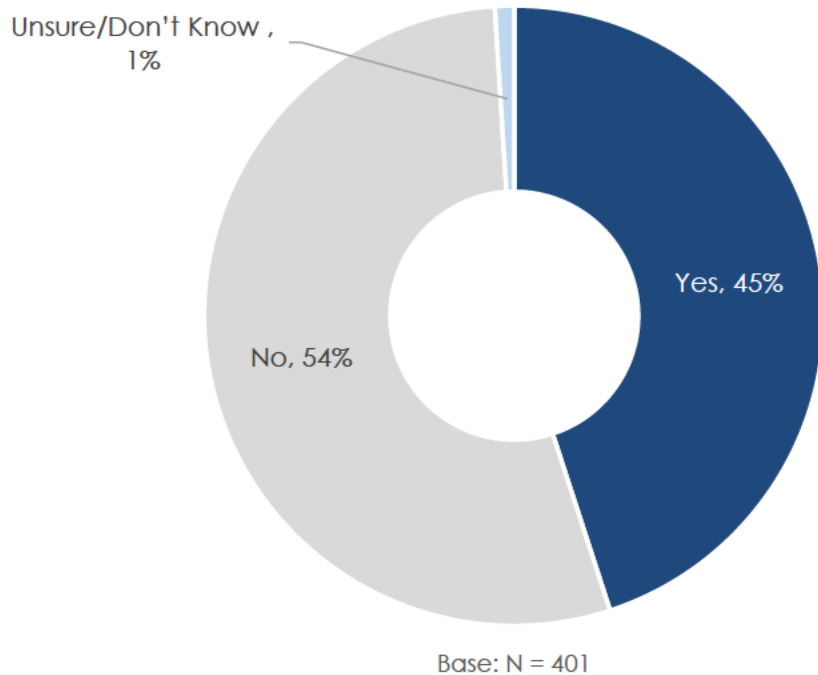
**Year on Year Trend**
Awareness of Precinct Committees
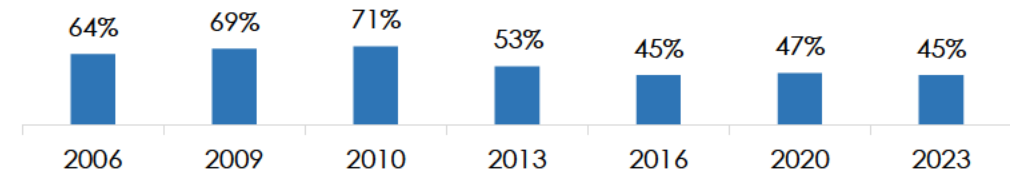


| | Overall | Gender | | Ward | | Ratepayer Status | |
|---|---|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer /Other |
| Yes | 45% | 44% | 47% | 42% | 49% | 60% | 20% |
| Base | 401 | 186 | 213 | 203 | 197 | 252 | 149 |

| | Age | | | | Time lived in Council area | |
|---|---|---|---|---|---|---|
| | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Yes | 21% | 33% | 63% | 77% | 24% | 60% |
| Base | 125 | 112 | 53 | 110 | 165 | 236 |

Donut chart: Yes, 45%; No, 54%; Unsure/Don't Know, 1%. Base: N = 401

*Q13. The North Sydney Council area is split into 23 'Precinct Committees' made up of residents, students, workers, and businesses who discuss matters affecting their local area. Prior to me telling you this, were you aware that you had a local Precinct Committee? (Resident)*

A significantly higher/lower percentage by group   21

Section 1b:

# Summary of Council Services/Facilities

# Section 2b (Resident)

micromex research

# 5 Point Vs. 7 Point Overall Satisfaction

For converting a 7-point (7p) scale to a 5-point (5p), mathematically the scaling change is as follows: 5p = 7p x 0.66 + 0.33.

More specifically the conversion is: {1=1, 2=1.66, 3=2.33, 4=3, 5=3.66, 6=4.33, 7=5}.

Conversely, to convert 5-point to 7-point is: 7p = 5p x 1.5 – 0.5. More specifically: {1=1, 2=2.5, 3=4, 4=5.5, 5=7}.

Looking at the chart below we can see that these formulas do match visually, and when we look at the mean scores compared to the 'converted' mean score, results are not significantly different between the two scales.
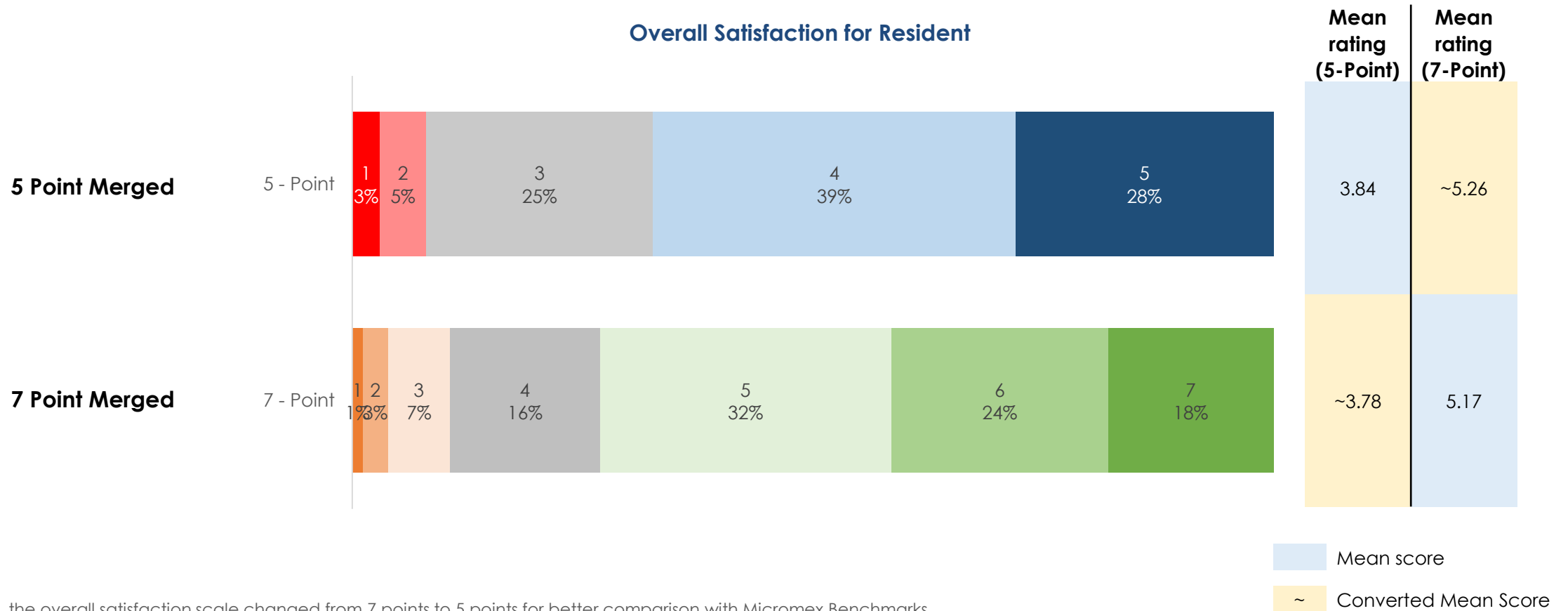
**Overall Satisfaction for Resident**

| | | Mean rating (5-Point) | Mean rating (7-Point) |
|---|---|---|---|
| **5 Point Merged** | 5 - Point — 1: 3%, 2: 5%, 3: 25%, 4: 39%, 5: 28% | 3.84 | ~5.26 |
| **7 Point Merged** | 7 - Point — 1: 1%, 2: 3%, 3: 7%, 4: 16%, 5: 32%, 6: 24%, 7: 18% | ~3.78 | 5.17 |

Legend:
- Mean score
- ~ Converted Mean Score

# Overall Satisfaction – Resident

92% of residents are at least somewhat satisfied with Council's performance over the past 12 months. The mean rating is significantly higher than the Group 3 Benchmark, though it has softened slightly since 2020.



Very satisfied (5) — 28%
Satisfied (4) — 39%
Somewhat satisfied (3) — 25%
Not very satisfied (2) — 5%
Not at all satisfied (1) — 3%
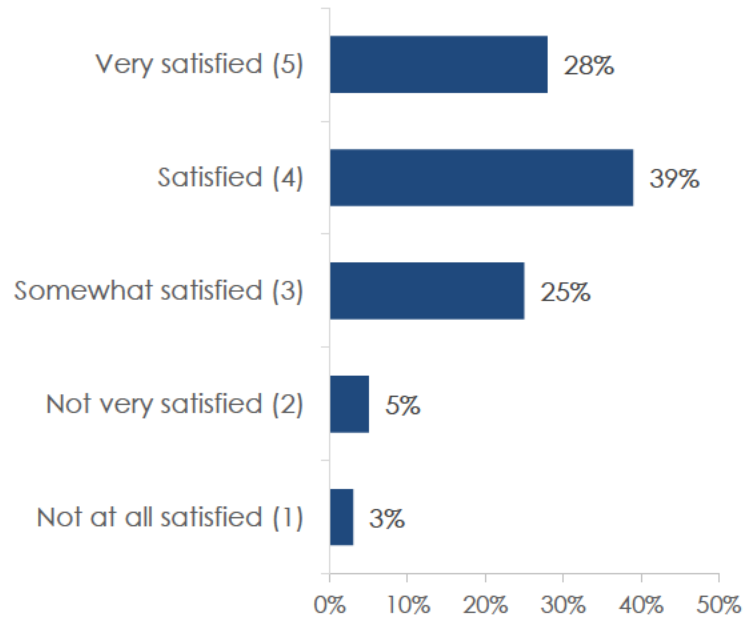
### Year on Year Trend

| | 2023 | 2020 |
|---|---|---|
| Mean rating | 3.84 | 3.96* |
| Base | 401 | 400 |

| | North Sydney Council | Micromex LGA **Group 3** Benchmark | Micromex LGA **Metro** Benchmark |
|---|---|---|---|
| Top 3 Box % | 92% | 89% | 90% |
| Mean rating | 3.84 | 3.55 | 3.58 |
| Base | 401 | 19,330 | 28,819 |

| | Overall | Gender | | Ward | | Ratepayer Status | |
|---|---|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer/ Other |
| Top 3 Box % | 92% | 92% | 92% | 94% | 90% | 88% | 98% |
| Mean rating | 3.84 | 3.87 | 3.82 | 3.92 | 3.75 | 3.68 | 4.11 |
| Base | 401 | 186 | 215 | 203 | 197 | 251 | 149 |

| | Age | | | | Time lived in Council area | |
|---|---|---|---|---|---|---|
| | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Top 3 Box % | 100% | 89% | 84% | 90% | 96% | 89% |
| Mean rating | 4.11 | 3.69 | 3.41 | 3.90 | 3.93 | 3.78 |
| Base | 125 | 112 | 53 | 110 | 165 | 236 |

Base: N = 401

Note: *This value was converted and calculated using 5 points scale

Q7a. Thinking about all the services your Council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 5 where 1 is not at all satisfied and 5 is very satisfied. (Resident)

Scale: 1 = not at all satisfied, 5 = very satisfied
A significantly higher/lower percentage/number by group

24

# Council Services and Facilities – Resident

A major component of the 2023 Resident Survey was to assess perceived Importance of, and Satisfaction with 28 Council-provided services and facilities – the equivalent of 56 separate questions!

We have utilised the following techniques to summarise and analyse these 56 questions:
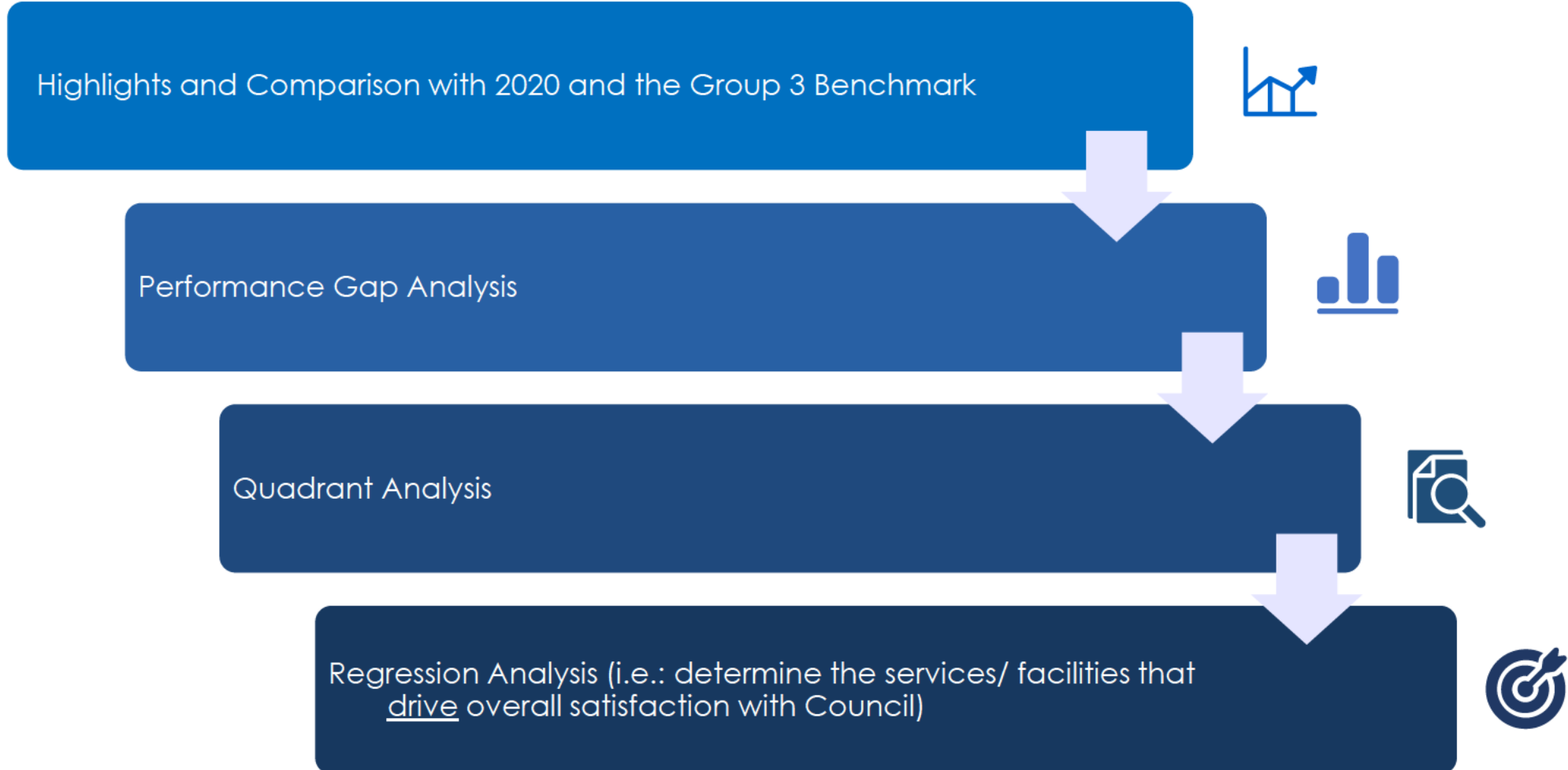
Highlights and Comparison with 2020 and the Group 3 Benchmark

Performance Gap Analysis

Quadrant Analysis

Regression Analysis (i.e.: determine the services/ facilities that _drive_ overall satisfaction with Council)

# Importance & Satisfaction – Highest/Lowest Rated Services/Facilities

A core element of this community survey was the rating of 28 facilities/services in terms of Importance and Satisfaction. The analysis below identifies the highest and lowest rated services/facilities in terms of importance and satisfaction.

## Importance

The following services/facilities received the highest T2 box importance ratings:

| Higher importance | T2 Box | Mean |
|---|---|---|
| Maintenance of parks, playgrounds, bushland areas, and recreation areas | 96% | 4.71 |
| Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc. | 96% | 4.76 |
| Waste and recycling collection services | 96% | 4.76 |
| Cleanliness of local roads and footpaths | 90% | 4.46 |
| Maintenance of footpaths | 90% | 4.52 |
| Long term planning | 90% | 4.56 |

The following services/facilities received the lowest T2 box importance ratings:

| Lower importance | T2 Box | Mean |
|---|---|---|
| Wharves and boat ramps, dinghy/kayak storage etc. | 25% | 2.49 |
| Cycleways | 35% | 2.84 |
| Community centres and halls | 53% | 3.46 |
| Council run community events | 61% | 3.70 |
| Stanton Library | 63% | 3.77 |
| Bus shelters | 63% | 3.72 |

## Satisfaction

The following services/facilities received the highest T3 box satisfaction ratings:

| Higher satisfaction | T3 Box | Mean |
|---|---|---|
| Stanton Library | 97% | 4.37 |
| Council run community events | 96% | 3.87 |
| Maintenance of parks, playgrounds, bushland areas, and recreation areas | 95% | 4.04 |
| Cleanliness of local roads and footpaths | 94% | 3.98 |
| Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc. | 94% | 4.07 |
| Maintenance of plazas in commercial areas | 94% | 3.84 |
| Community centres and halls | 94% | 3.78 |

The following services/facilities received the lowest T3 box satisfaction ratings:

| Lower satisfaction | T3 Box | Mean |
|---|---|---|
| Building height and town centres | 66% | 2.99 |
| Cycleways | 66% | 2.94 |
| Managing development/town planning (land use planning) | 68% | 2.97 |
| Wharves and boat ramps, dinghy/kayak storage etc. | 69% | 3.24 |
| Long term planning | 71% | 3.01 |

T2B = important/very important
Scale: 1 = not at all important, 5 = very important

T3B = somewhat satisfied/satisfied/very satisfied
Scale: 1 = not at all satisfied, 5 = very satisfied

# Services and Facilities – <u>Satisfaction</u>: Comparison by Year

The below chart compares the mean satisfaction ratings for 2023 vs 2020.

Satisfaction significantly increased for Stanton Library and Community centres/halls, while it decreased for management of traffic flow and recreation facilities/amenities.

**2023 Satisfaction Ratings** (y-axis)

**2020 Satisfaction Ratings** (x-axis)

Stanton Library — (0.42)
Community centres and halls — (0.29)
Customer service/information provided by Council staff — (0.04)
Maintenance of plazas in commercial areas — (0.03)
Council run community events (e.g. Twilight Food Fair, the Childrens Festival, North Sydney Art Prize) — (0.02)
Range of arts and cultural experiences in North Sydney — (0.02)
Appearance of local village centres (public domain/streetscape) — (0.01)
Cleanliness of local roads and footpaths (e.g. street sweeping) — (0.01)

Appearance of public spaces in the North Sydney CBD (public domain) — (-0.02)
Waste and recycling collection services — (-0.05)
Maintenance of the local roads and footpaths* — (-0.06)
Provision of parking (commercial areas, residential areas e.g., policing, residents parking, parking facilities, restrictions, parking in shopping areas) — (-0.06)
Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc. — (-0.07)
Maintenance of parks, playgrounds, bushland areas, and recreation areas — (-0.11)
Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas — (-0.23)
Recreation facilities and amenities (e.g. sporting fields, North Sydney Indoor Sports Centre, MacCallum Pool) — (-0.43)

= A significantly higher/lower level of satisfaction (compared to 2020)

Note: 2020 values were converted and calculated using 5 points scale
* Maintenance of footpaths and local roads were merged for comparison with 2020

# Summary Importance: Comparison to the Group 3 Benchmark

The chart to the right shows the variance between North Sydney Council top 2 box importance scores and the Group 3 Benchmark. Services/facilities shown in the below chart highlight larger positive and negative gaps.

Council commissioned bespoke benchmarking against OLG Group 3 councils - to compare against metropolitan councils of similar size.

**North Sydney Council Top 2 Box Importance Scores**

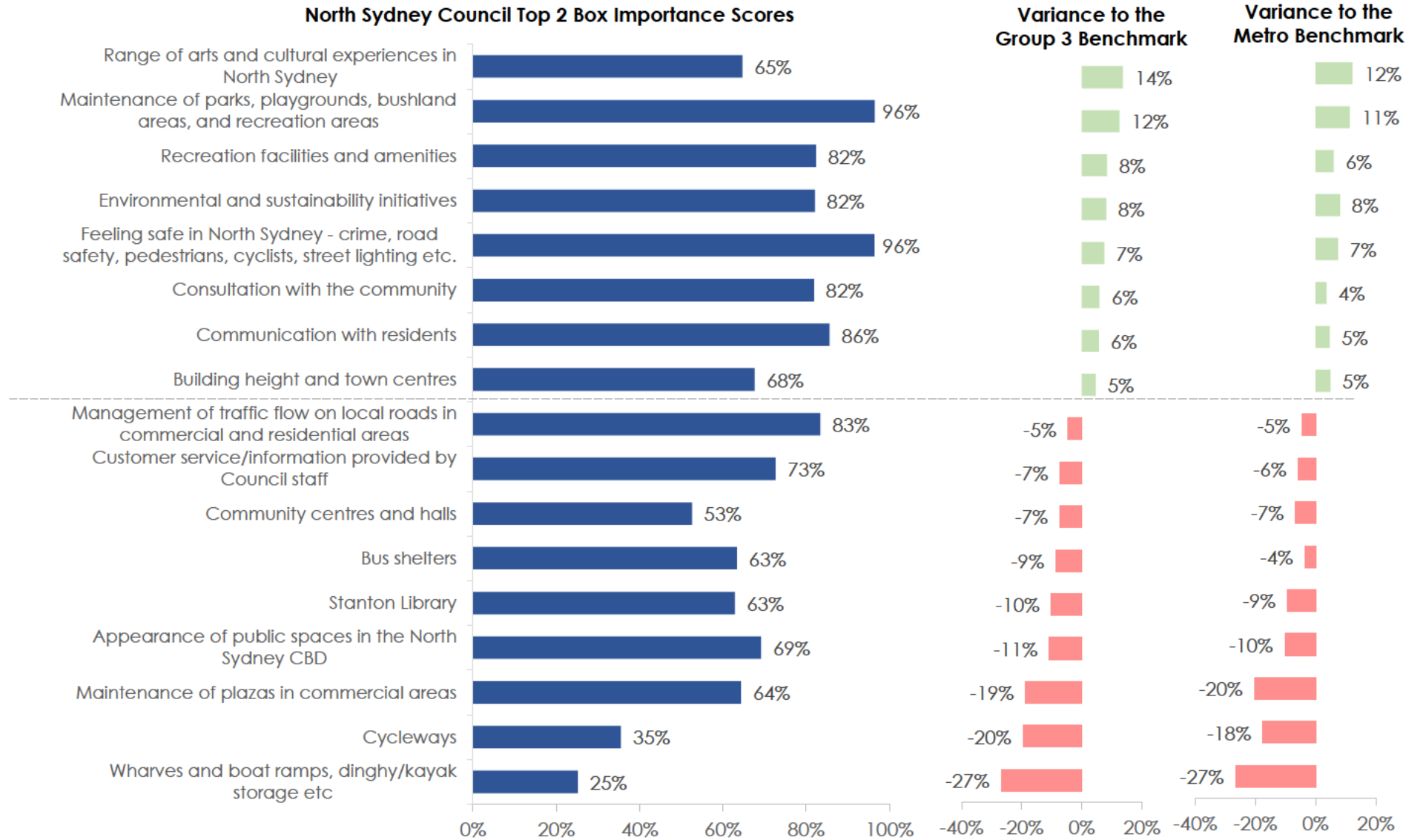| Service/Facility | Score | Variance to the Group 3 Benchmark | Variance to the Metro Benchmark |
|---|---|---|---|
| Range of arts and cultural experiences in North Sydney | 65% | 14% | 12% |
| Maintenance of parks, playgrounds, bushland areas, and recreation areas | 96% | 12% | 11% |
| Recreation facilities and amenities | 82% | 8% | 6% |
| Environmental and sustainability initiatives | 82% | 8% | 8% |
| Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc. | 96% | 7% | 7% |
| Consultation with the community | 82% | 6% | 4% |
| Communication with residents | 86% | 6% | 5% |
| Building height and town centres | 68% | 5% | 5% |
| Management of traffic flow on local roads in commercial and residential areas | 83% | -5% | -5% |
| Customer service/information provided by Council staff | 73% | -7% | -6% |
| Community centres and halls | 53% | -7% | -7% |
| Bus shelters | 63% | -9% | -4% |
| Stanton Library | 63% | -10% | -9% |
| Appearance of public spaces in the North Sydney CBD | 69% | -11% | -10% |
| Maintenance of plazas in commercial areas | 64% | -19% | -20% |
| Cycleways | 35% | -20% | -18% |
| Wharves and boat ramps, dinghy/kayak storage etc | 25% | -27% | -27% |

Note: Only services/facilities with a variance of +/- 5% to the Benchmark have been shown above. Please see Appendix 1 for detailed list

Top 2 box = important/very important

# Summary <u>Satisfaction</u>: Comparison to the Group 3 Benchmark

The chart to the right shows the variance between North Sydney Council top 3 satisfaction scores and the Group 3 Benchmark. Services/facilities shown in the chart to the right highlight larger positive and negative gaps.
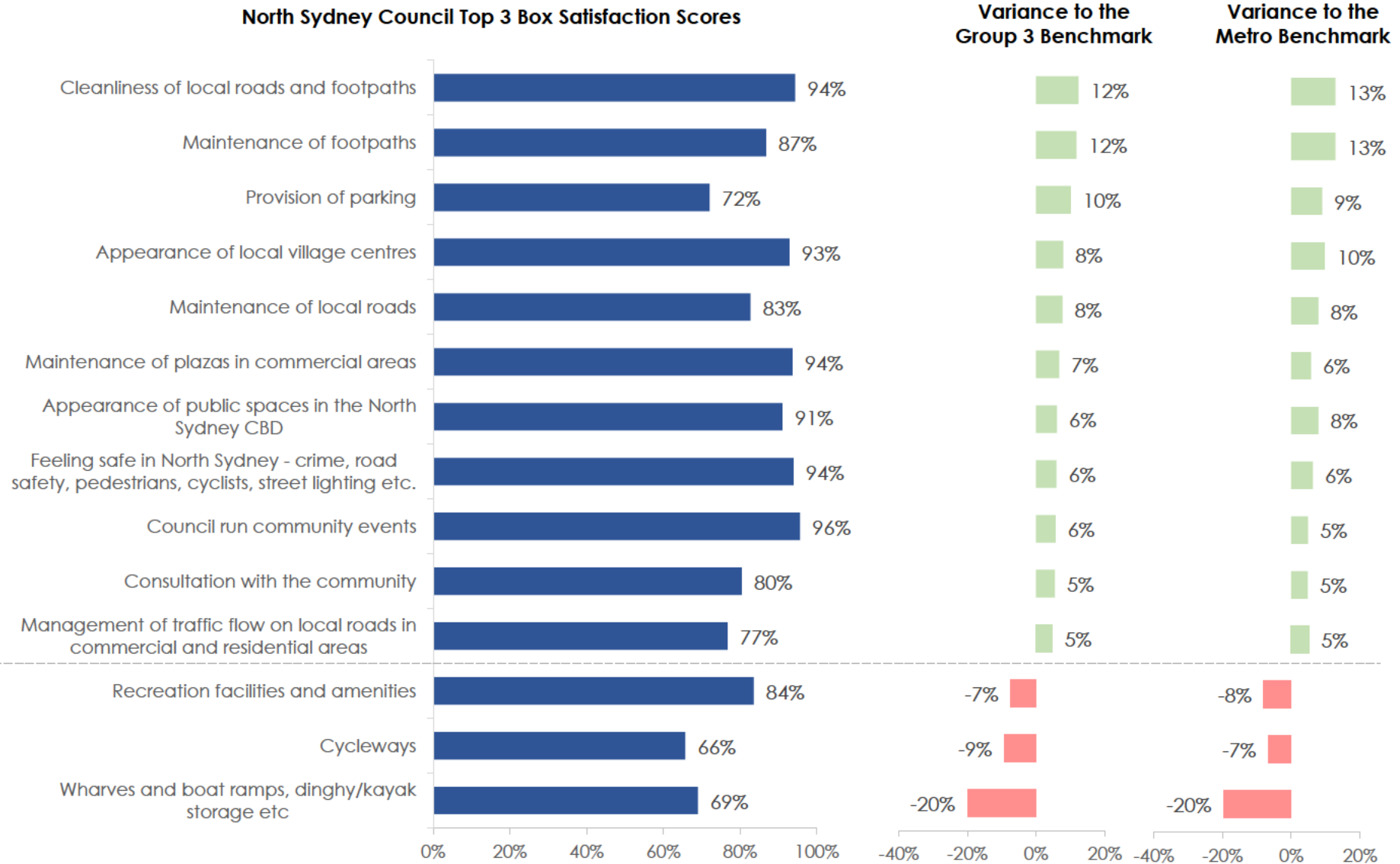
**North Sydney Council Top 3 Box Satisfaction Scores**

| Service/Facility | Top 3 Box | Variance to the Group 3 Benchmark | Variance to the Metro Benchmark |
|---|---|---|---|
| Cleanliness of local roads and footpaths | 94% | 12% | 13% |
| Maintenance of footpaths | 87% | 12% | 13% |
| Provision of parking | 72% | 10% | 9% |
| Appearance of local village centres | 93% | 8% | 10% |
| Maintenance of local roads | 83% | 8% | 8% |
| Maintenance of plazas in commercial areas | 94% | 7% | 6% |
| Appearance of public spaces in the North Sydney CBD | 91% | 6% | 8% |
| Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc. | 94% | 6% | 6% |
| Council run community events | 96% | 6% | 5% |
| Consultation with the community | 80% | 5% | 5% |
| Management of traffic flow on local roads in commercial and residential areas | 77% | 5% | 5% |
| Recreation facilities and amenities | 84% | -7% | -8% |
| Cycleways | 66% | -9% | -7% |
| Wharves and boat ramps, dinghy/kayak storage etc | 69% | -20% | -20% |

Note: Only services/facilities with a variance of +/- 5% to the Benchmark have been shown above. Please see Appendix 1 for detailed list
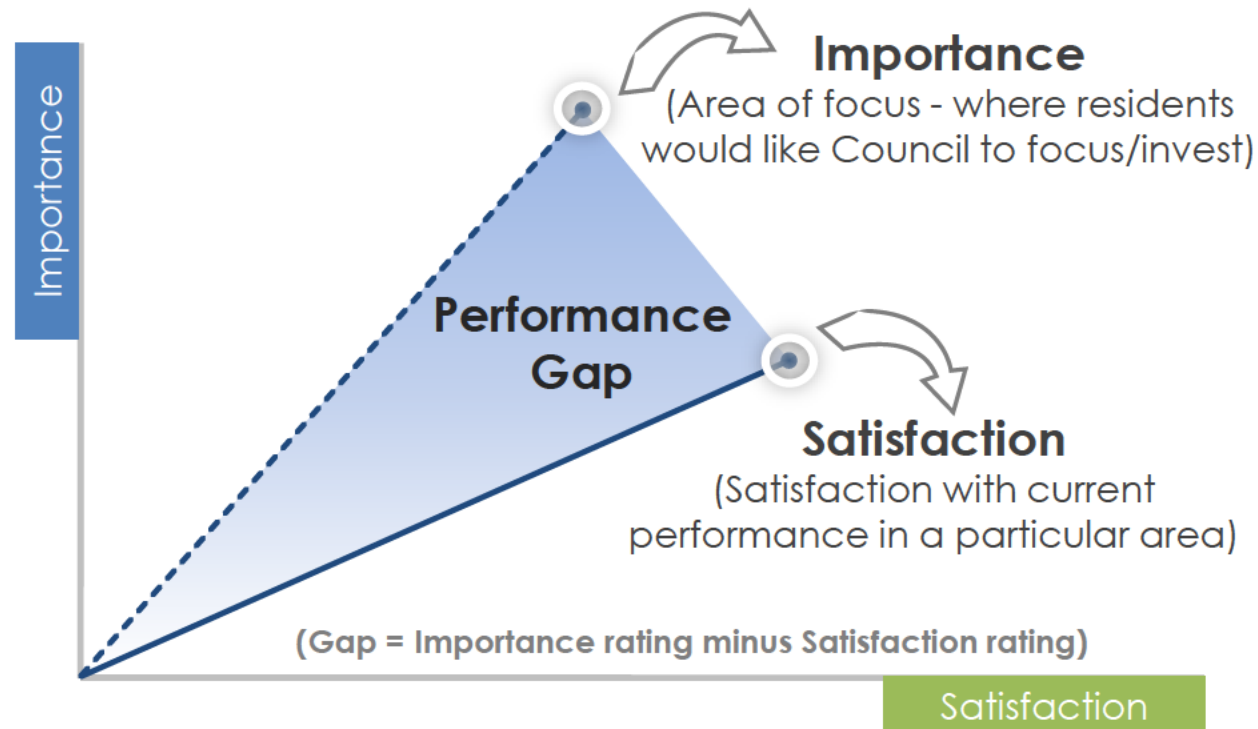Top 3 box = at least somewhat satisfied

# Performance Gap Analysis – Resident

PGA establishes the gap between importance and satisfaction. This is calculated by subtracting the top 3 satisfaction score from the top 2 importance score. In order to measure performance gaps, respondents are asked to rate the importance of, and their satisfaction with, each of a range of different services or facilities on a scale of 1 to 5, where 1 = low importance or satisfaction and 5 = high importance or satisfaction. These scores are aggregated at a total community level.

The higher the differential between importance and satisfaction, the greater the difference is between the provision of that service by North Sydney Council and the expectation of the community for that service/facility.

In the table on the following page, we can see the services and facilities with the largest performance gaps.

When analysing the performance gaps, it is expected that there will be some gaps in terms of resident satisfaction. Those services/facilities that have achieved a performance gap of greater than 20% may be indicative of areas requiring future optimisation.



**Importance**
(Area of focus - where residents would like Council to focus/invest)

**Performance Gap**

**Satisfaction**
(Satisfaction with current performance in a particular area)

**(Gap = Importance rating minus Satisfaction rating)**

# Performance Gap Analysis – Resident

When we examine the largest performance gaps, we can identify that all of the services or facilities have been rated as high in importance, whilst resident satisfaction for all of these areas is between 68% and 83%.

Long-term planning/development management, traffic management, maintenance of local roads and provision of parking had the largest performance gaps.

| Service Area | Service/Facility | Importance T2 Box | Satisfaction T3 Box | Performance Gap (Importance – Satisfaction) |
|---|---|---|---|---|
| Development | Long term planning | 90% | 71% | 18% |
| Development | Managing development/town planning (land use planning) | 85% | 68% | 17% |
| Infrastructure & Transport | Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas | 83% | 77% | 7% |
| Infrastructure & Transport | Maintenance of local roads | 89% | 83% | 6% |
| Infrastructure & Transport | Provision of parking | 77% | 72% | 5% |

**Note**: Performance gap is the first step in the process, we now need to identify comparative ratings across all services and facilities to get an understanding of relative importance and satisfaction at an LGA level. This is when we undertake step 2 of the analysis.

# Quadrant Analysis – Resident

Quadrant analysis is often helpful in planning future directions based on stated outcomes. It combines the stated importance of the community and assesses satisfaction with delivery in relation to these needs.

This analysis is completed by plotting the variables on x and y axes, defined by stated importance and rated satisfaction. We aggregate the top 2 box importance scores and top 3 satisfaction scores for stated importance and rated satisfaction to identify where the facility or service should be plotted.

On average, North Sydney Council residents rated services/facilities on par in terms of importance to our Group 3 Benchmark, and their satisfaction was, on average, slightly higher.

|  | North Sydney Council | Micromex LGA Group 3 Benchmark |
|---|---|---|
| Average Importance | 75% | 76% |
| Average Satisfaction | 84% | 82% |

Note: Micromex comparable benchmark only refers to like for like measures

**Explaining the 4 quadrants (overleaf)**

Attributes in the top right quadrant, **MAINTAIN,** such as 'Maintenance of parks, playgrounds, bushland areas, and recreation areas', are Council's core strengths, and should be treated as such. Maintain, or even attempt to improve your position in these areas, as they are influential and address clear community needs.

Attributes in the top left quadrant, **IMPROVE,** such as 'Provision of parking (commercial areas, residential areas e.g., policing, residents parking, parking facilities, restrictions, parking in shopping areas)' are key concerns in the eyes of your residents. In the vast majority of cases you should aim to improve your performance in these areas to better meet the community's expectations.

Attributes in the bottom left quadrant, **NICHE,** such as 'Building height and town centres', are of a relatively lower priority (and the word 'relatively' should be stressed – they are still important). These areas tend to be important to a particular segment of the community.

Finally, attributes in the bottom right quadrant, **SOCIAL CAPITAL,** such as 'Council run community events (e.g. Twilight Food Fair, the Childrens Festival, North Sydney Art Prize)', are core strengths, but in relative terms they are considered less overtly important than other directly obvious areas. However, the occupants of this quadrant tend to be the sort of services and facilities that deliver to community liveability, i.e. make it a good place to live.

Recommendations based only on stated importance and satisfaction have major limitations, as the actual questionnaire process essentially 'silos' facilities and services as if they are independent variables, when they are in fact all part of the broader community perception of council performance.
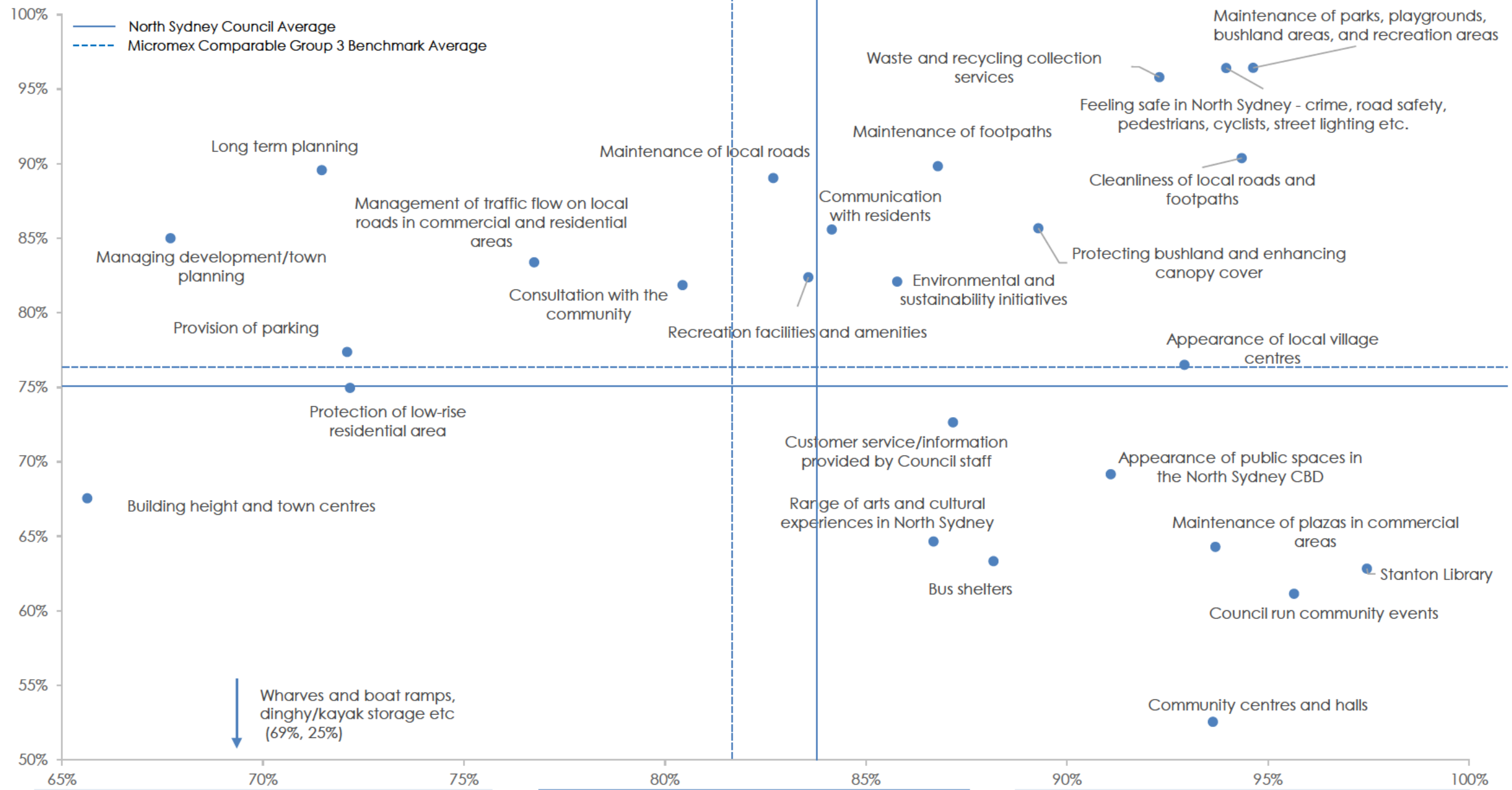
**Resident**

Improve
Higher importance, lower satisfaction

Maintain
Higher importance, higher satisfaction

Niche
Lower importance, lower satisfaction

Social Capital
Lower importance, higher satisfaction

Importance

Satisfaction

— North Sydney Council Average
- - - Micromex Comparable Group 3 Benchmark Average

Maintenance of parks, playgrounds, bushland areas, and recreation areas

Waste and recycling collection services

Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc.

Long term planning

Maintenance of local roads

Maintenance of footpaths

Management of traffic flow on local roads in commercial and residential areas

Communication with residents

Cleanliness of local roads and footpaths

Managing development/town planning

Protecting bushland and enhancing canopy cover

Consultation with the community

Environmental and sustainability initiatives

Provision of parking

Recreation facilities and amenities

Appearance of local village centres

Protection of low-rise residential area

Customer service/information provided by Council staff

Appearance of public spaces in the North Sydney CBD

Building height and town centres

Range of arts and cultural experiences in North Sydney

Maintenance of plazas in commercial areas

Stanton Library

Bus shelters

Council run community events

Wharves and boat ramps, dinghy/kayak storage etc (69%, 25%)

Community centres and halls

33

# Regression Analysis – Resident

The outcomes identified in stated importance/satisfaction analysis often tend to be obvious and challenging. No matter how much focus a council dedicates to 'long-term planning', it will often be found in the **IMPROVE** quadrant. This is because, perceptually, the condition of local roads can always be better.

Furthermore, the outputs of stated importance and satisfaction analysis address the current dynamics of the community, they do not predict which focus areas are the most likely agents to change the community's perception of Council's overall performance.
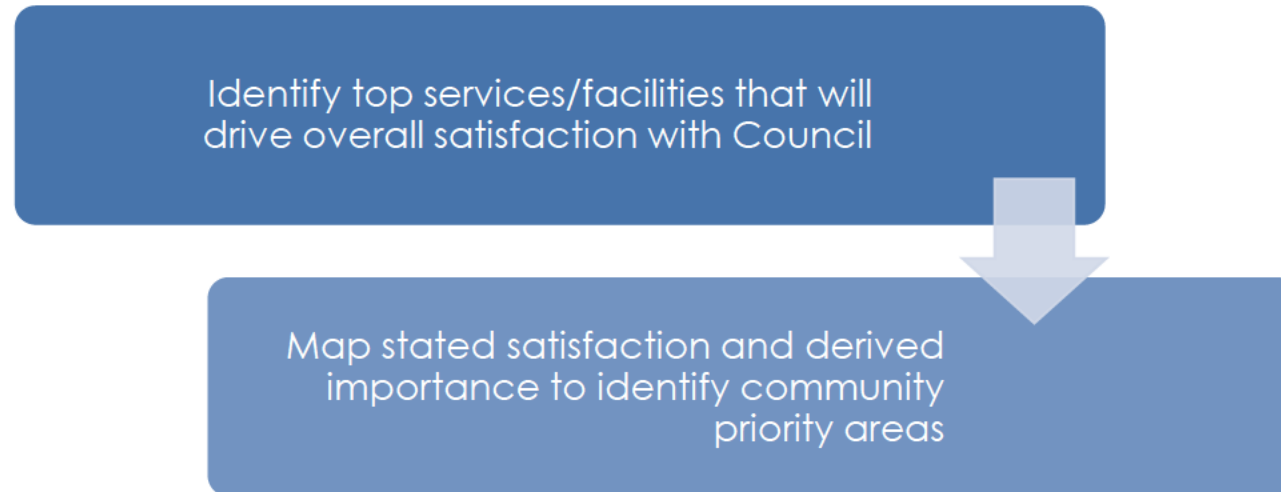
Therefore, in order to identify how North Sydney Council can actively drive overall community satisfaction, we conducted further analysis

**Explanation of Analysis**

Regression analysis is a statistical tool for investigating relationships between dependent variables and explanatory variables. Using a regression, a category model was developed. The outcomes demonstrated that increasing resident satisfaction by actioning the priorities they stated as being important would not necessarily positively impact on overall satisfaction.
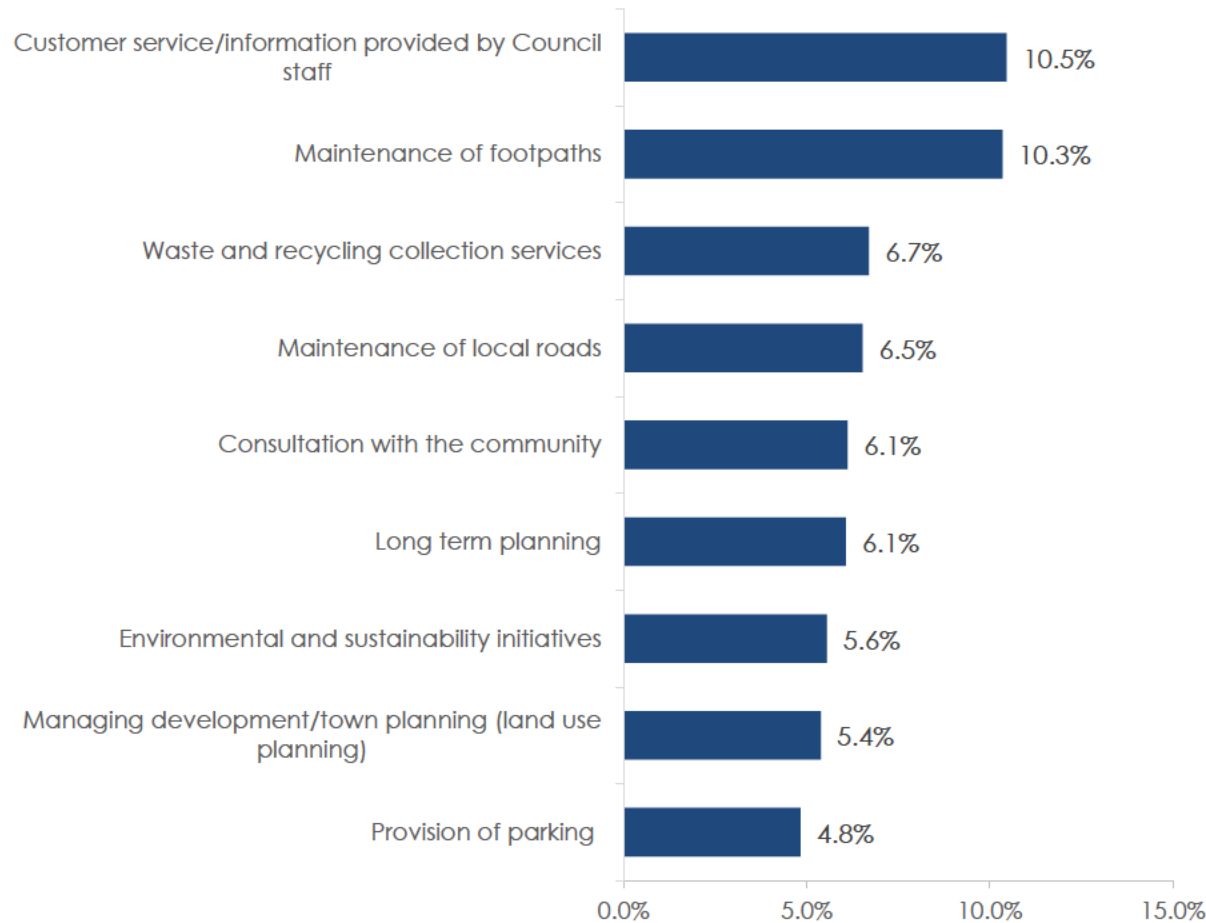
**What Does This Mean?**

The learning is that if we only rely on the stated community priorities, we will not be allocating the appropriate resources to the actual service attributes that will improve overall community satisfaction. Using regression analysis, we can identify the attributes that essentially build overall satisfaction. We call the outcomes 'derived importance'.

Identify top services/facilities that will drive overall satisfaction with Council

Map stated satisfaction and derived importance to identify community priority areas

# Key Drivers of Overall Satisfaction with Council – Resident

The score assigned to each area indicates the percentage of influence each measure contributes to overall satisfaction with Council. If Council can increase satisfaction in these areas, it will improve overall community satisfaction.

| Service/Facility | % |
|---|---|
| Customer service/information provided by Council staff | 10.5% |
| Maintenance of footpaths | 10.3% |
| Waste and recycling collection services | 6.7% |
| Maintenance of local roads | 6.5% |
| Consultation with the community | 6.1% |
| Long term planning | 6.1% |
| Environmental and sustainability initiatives | 5.6% |
| Managing development/town planning (land use planning) | 5.4% |
| Provision of parking | 4.8% |

The results in the chart to the left identify which services/facilities contribute most to overall satisfaction. If Council can improve satisfaction scores across these services/facilities, they are likely to improve their overall satisfaction score.

These top 9 services/facilities (so 32% of the 28 services/facilities) account for over 60% of the variation in overall satisfaction. Therefore, whilst all 28 services/facilities are important, only a number of them are potentially significant drivers of satisfaction (at this stage, the other 19 services/facilities have less impact on satisfaction – although if resident satisfaction with them was to suddenly change they may have more immediate impact on satisfaction).

$R^2$ value = 0.471

**Dependent Variable:** *Q7a. Thinking about all the services your Council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 5 where 1 is not at all satisfied and 5 is very satisfied. (Resident)*

# Mapping Stated Satisfaction and Derived Importance Identifies the Community Priority Areas – Resident

The below chart looks at the relationship between stated satisfaction (top 3 box) and derived importance (Regression result) to identify the level of contribution of each measure. Any services/facilities below the blue line (shown above) could potentially be benchmarked to target in future research to elevate satisfaction levels in these areas.
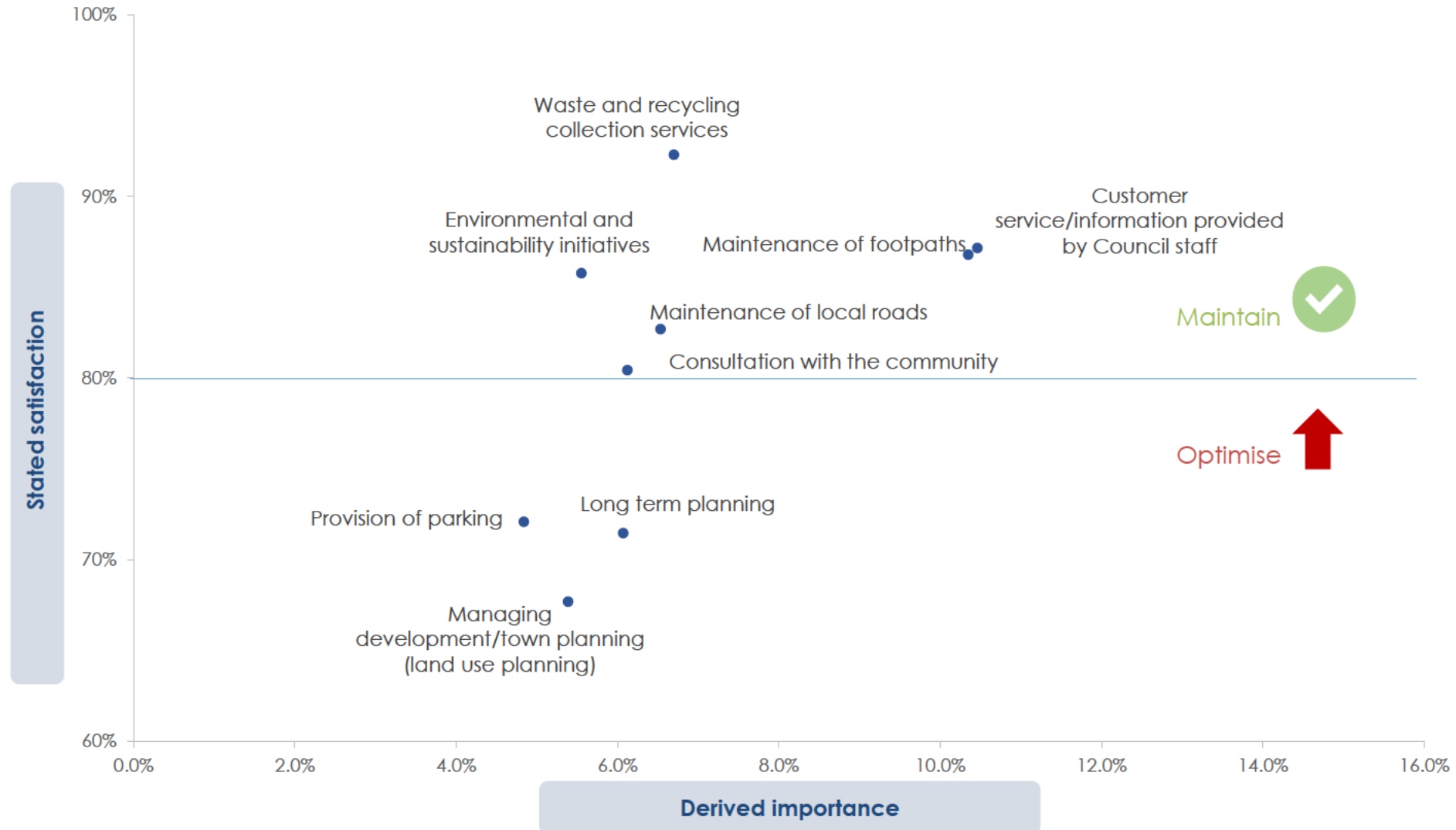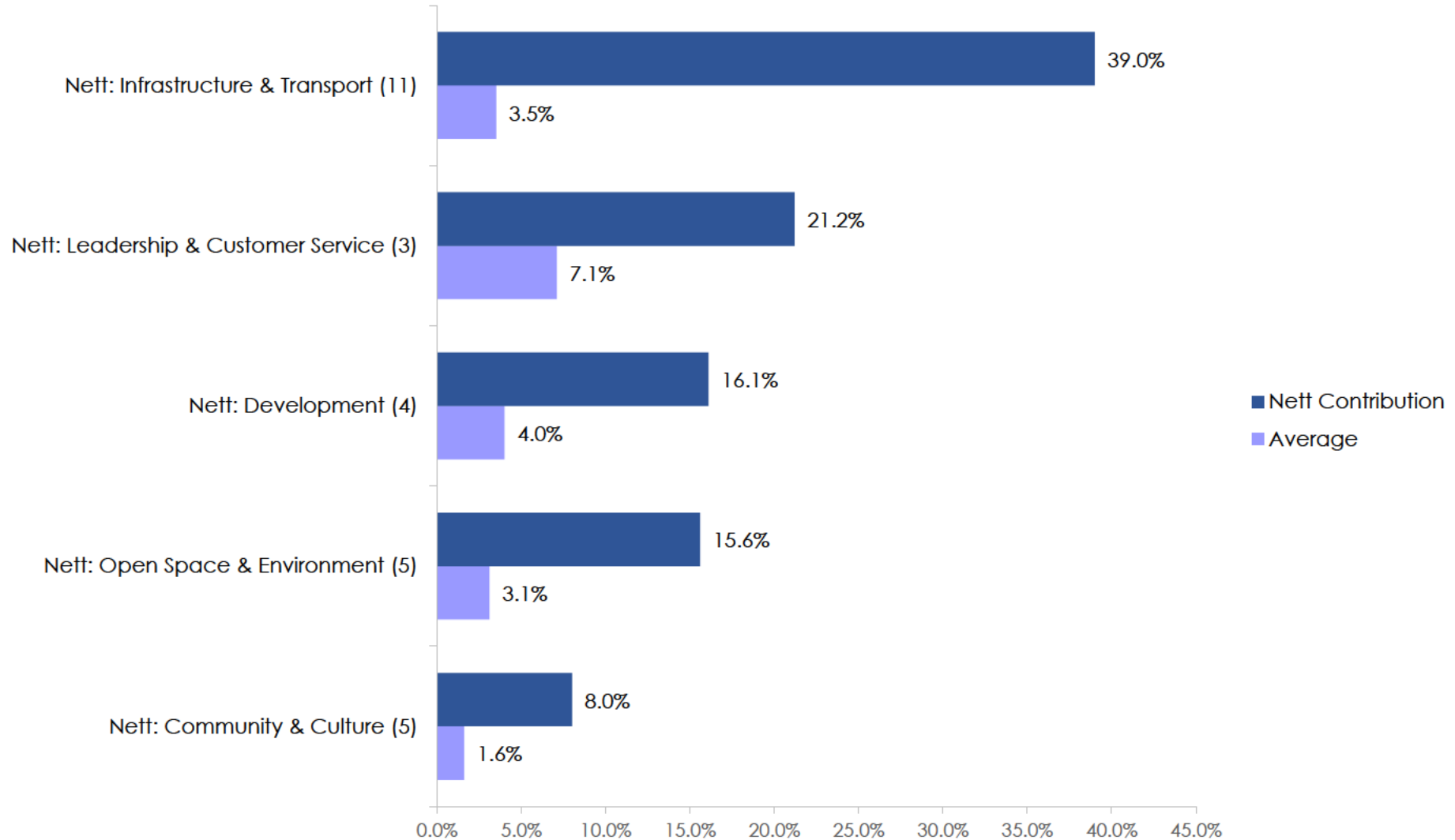
# Contribution to Overall Satisfaction with Council's Performance – Resident

By combining the outcomes of the regression data, we can identify the derived importance of the different Nett Priority Areas.

'Infrastructure & Transport' (39%) is the key contributor toward overall satisfaction with Council's performance.

Although 'Leadership & Customer Service' had only 3 measures, the average contribution for this area is 7.1% (the highest average overall).



Nett: Infrastructure & Transport (11): Nett Contribution 39.0%, Average 3.5%
Nett: Leadership & Customer Service (3): Nett Contribution 21.2%, Average 7.1%
Nett: Development (4): Nett Contribution 16.1%, Average 4.0%
Nett: Open Space & Environment (5): Nett Contribution 15.6%, Average 3.1%
Nett: Community & Culture (5): Nett Contribution 8.0%, Average 1.6%

■ Nett Contribution
■ Average

Note: Numbers in brackets represent the number of services/facilities within each service area

# Reasons for Low Satisfaction

Better parking availability, maintenance of roads (e.g. potholes) and uneven surface of footpaths are the common reasons for low satisfaction for residents.

## Resident (N=401)

### Provision of parking (including restrictions, resident parking, ETC)

| Top reasons | N=93 |
|---|---|
| Limited parking availability general | 64% |
| Parking fees/fines | 26% |
| Too many restricted parking areas/ Need longer parking time | 19% |
| Lack of parking rule enforcement | 9% |
| Zoning issues e.g. difficult for large vehicles to park | 7% |

### Maintenance of the local roads

| Top reasons | N=59 |
|---|---|
| Maintenance of roads e.g. potholes | 72% |
| Roadworks taking too long | 22% |
| Traffic congestion | 19% |
| Unsafe roads | 12% |
| Council does not response efficiently/refuses to solve enquiries | 8% |

### Maintenance of the local footpaths

| Top reasons | N=53 |
|---|---|
| Uneven surface e.g. tree roots, cracked | 76% |
| Lack of maintenance/repairs taking too long | 35% |
| Footpaths are slippery | 10% |
| Safety | 8% |
| Improved planning of footpaths | 4% |

*Q9a/Q7a. What particular aspects of 'PROVISION OF PARKING (INCLUDING RESTRICTIONS, RESIDENT PARKING, ETC) do you find unsatisfactory? (Resident/Business)*
*Q9b/Q7b. What particular aspects of 'MAINTENANCE OF THE LOCAL ROADS' do you find unsatisfactory? (Resident/Business)*
*Q9c/Q7c. What particular aspects of 'MAINTENANCE OF THE LOCAL FOOTPATHS' do you find unsatisfactory? (Resident/Business)*

# Usage of Services

Residents primarily used recreation facilities in the last 12 months, younger residents are less likely to have used services.
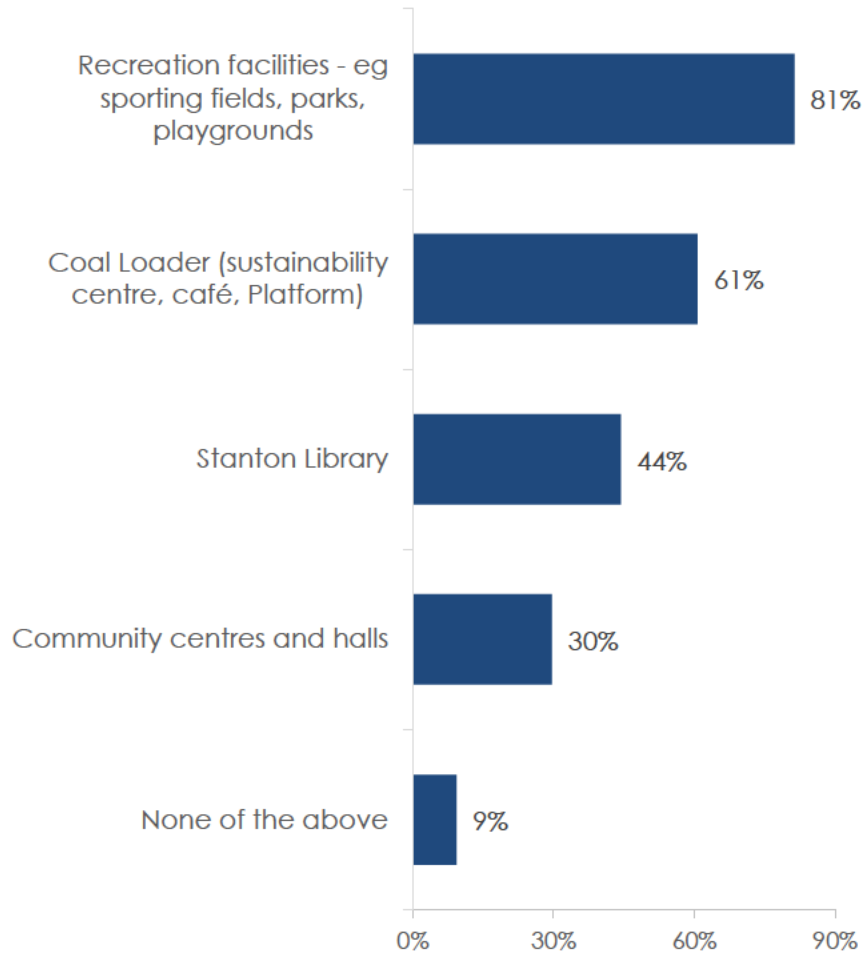


| | Overall | Gender | | Ward | | Ratepayer Status | |
|---|---|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer/Other |
| Recreation facilities | 81% | 84% | 79% | 78% | 85% | 83% | 79% |
| Coal Loader | 61% | 56% | 64% | 57% | 64% | 65% | 54% |
| Stanton Library | 44% | 37% | 51% | 41% | 47% | 46% | 42% |
| Community centres and halls | 30% | 26% | 33% | 29% | 31% | 34% | 22% |
| None of the above | 9% | 11% | 8% | 12% | 6% | 7% | 13% |
| Base | 401 | 186 | 215 | 203 | 197 | 252 | 149 |

| | Age | | | | Time lived in Council area | |
|---|---|---|---|---|---|---|
| | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Recreation facilities | 76% | 93% | 92% | 70% | 83% | 80% |
| Coal Loader | 56% | 68% | 64% | 56% | 60% | 61% |
| Stanton Library | 42% | 42% | 45% | 50% | 41% | 46% |
| Community centres and halls | 22% | 32% | 30% | 35% | 29% | 30% |
| None of the above | 15% | 2% | 3% | 13% | 8% | 10% |
| Base | 125 | 112 | 53 | 110 | 165 | 236 |

Base: N = 401

Q11. Which of the following services have you used in the past 12 months? (Resident)

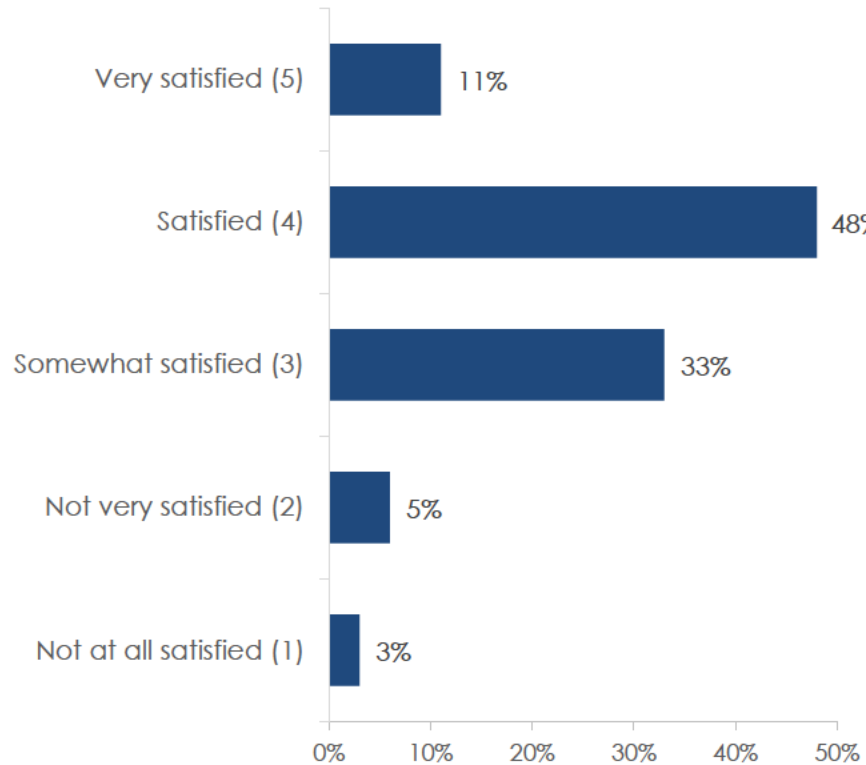A significantly higher/lower percentage by group   39

Section 1c:

# Future Priorities for North Sydney

Section 1c
(Resident)

micromex research

# Satisfaction with Where North Sydney is Heading in the Future

92% of residents are at least somewhat satisfied with where North Sydney is heading in the future. Non-ratepayers, younger residents and short-term residents are more likely to be satisfied.



Bar chart:
- Very satisfied (5): 11%
- Satisfied (4): 48%
- Somewhat satisfied (3): 33%
- Not very satisfied (2): 5%
- Not at all satisfied (1): 3%

| | Overall | Gender | | Ward | | Ratepayer Status | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| | | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer /Other |
| Top 3 Box % | 92% | 91% | 92% | 94% | 89% | 89% | 96% |
| Mean rating | 3.59 | 3.64 | 3.54 | 3.60 | 3.57 | 3.41 | 3.89 |
| Base | 400 | 185 | 215 | 202 | 197 | 250 | 149 |

| | Age | | | | Time lived in Council area | |
| --- | --- | --- | --- | --- | --- | --- |
| | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Top 3 Box % | 99% | 92% | 81% | 88% | 95% | 89% |
| Mean rating | 4.02 | 3.52 | 3.25 | 3.32 | 3.84 | 3.41 |
| Base | 125 | 111 | 53 | 110 | 165 | 235 |

Base: N = 400
Q12. How satisfied are you with where North Sydney is heading in the future? Please rate your satisfaction from 1 to 5 where 1 is not at all satisfied and 5 is very satisfied. (Resident)

Scale: 1 = not at all satisfied, 5 = very satisfied
A significantly higher/lower percentage/number by group

# High Priority Areas for the Next 10 Years – Resident

Residents believe overdevelopment and traffic congestion are the top priority areas for the next 10 years. Environmental preservation, sustainability and improved services are also top of mind.
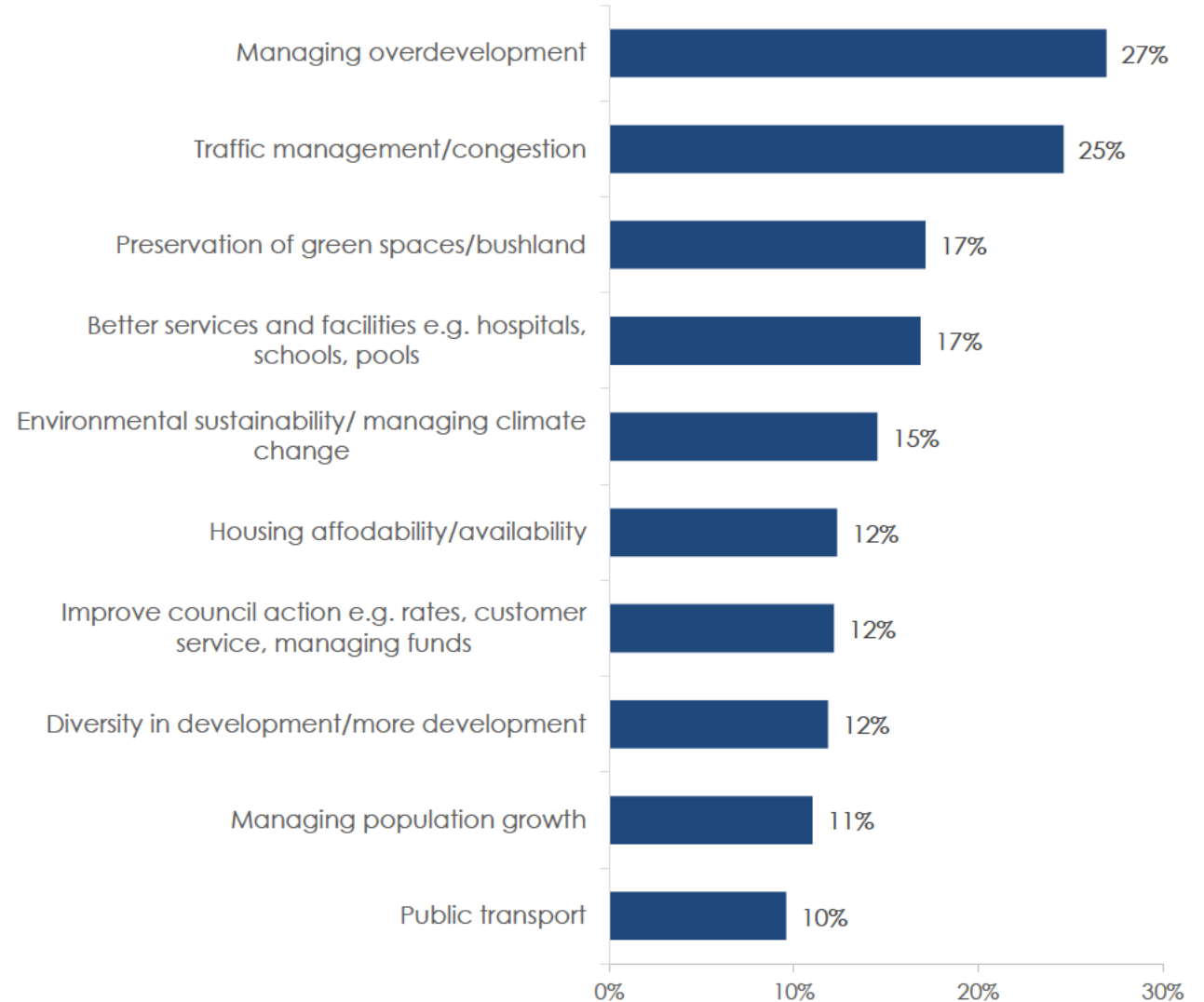
**Example Verbatims**

"Monitor development to ensure not too much high rise"

"Traffic flow management in Military Road"

"Recover green spaces lost in construction of tunnel etc."

"Improve community recreational facilities"

"Housing affordability for denser population"

| Priority Area | % |
|---|---|
| Managing overdevelopment | 27% |
| Traffic management/congestion | 25% |
| Preservation of green spaces/bushland | 17% |
| Better services and facilities e.g. hospitals, schools, pools | 17% |
| Environmental sustainability/ managing climate change | 15% |
| Housing affodability/availability | 12% |
| Improve council action e.g. rates, customer service, managing funds | 12% |
| Diversity in development/more development | 12% |
| Managing population growth | 11% |
| Public transport | 10% |

Base: N = 401

*Q10. Thinking about the next 10 years, what do you believe will be the highest priority issues within the North Sydney Council area?*

Please see Appendix 1 for full list of responses

Section 2a:

# Business in North Sydney

## Section 2a (Business)

micromex research

# Overall Satisfaction with North Sydney as a Place to do Business

92% of businesses are at least somewhat satisfied with North Sydney as a place to do business, though it has softened slightly compared to 2020. Females are more likely to be satisfied than males.
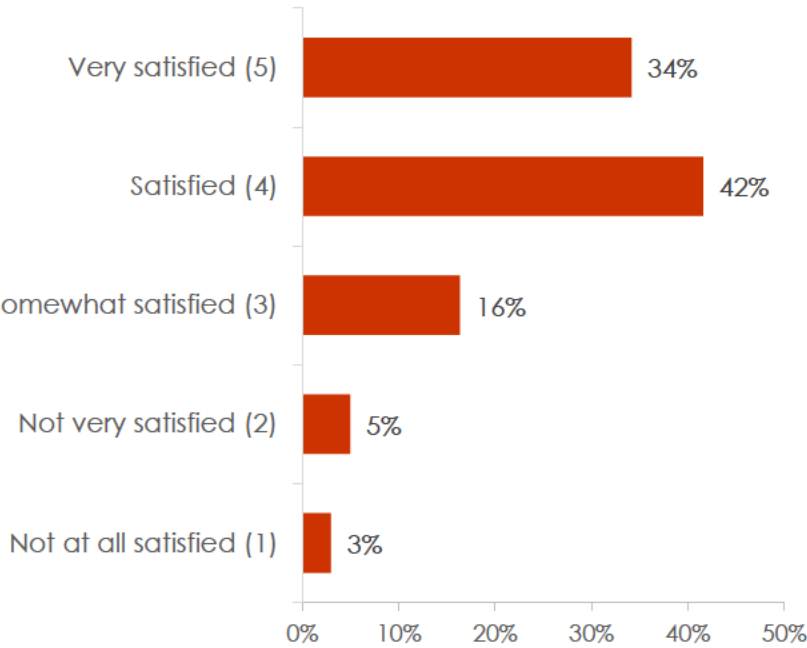


**Year on Year Trend**

|  | 2023 | 2020 |
|---|---|---|
| Mean rating | 3.99 | 4.04* |
| Base | 202 | 201 |

|  | Overall | Gender | | Ward | |
|---|---|---|---|---|---|
|  |  | Male | Female | St Leonards | Cammeraygal |
| Top 3 Box % | 92% | 89% | 96% | 92% | 92% |
| Mean rating | 3.99 | 3.78 | 4.24 | 3.94 | 4.03 |
| Base | 202 | 109 | 92 | 83 | 119 |

|  | Number of employees | | Business Type | | | | | |
|---|---|---|---|---|---|---|---|---|
|  | 0-5 | 6 or more | Property and business services | Health and community services | Retail trade | Accommodation, cafes, and restaurants | Finance and insurance | Other businesses |
| Top 3 Box % | 89% | 96% | 95% | 89% | 93% | 79% | 100% | 93% |
| Mean rating | 3.87 | 4.18 | 4.19 | 4.00 | 3.87 | 3.58 | 4.18 | 3.98 |
| Base | 122 | 79 | 43 | 38 | 30 | 19 | 17 | 55 |

Base: N = 202

Note: *This value was converted and calculated using 5 points scale

Q3. How satisfied are you with North Sydney as a place to do business on a scale of 1-5, where 1 is not at all satisfied and 5 is very satisfied?

Scale: 1 = not at all satisfied, 5 = very satisfied

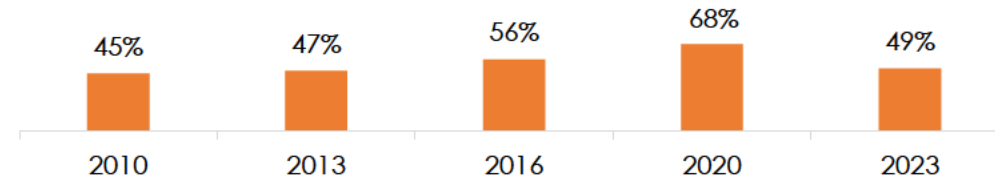A significantly higher/lower percentage/number (by group)

# Satisfaction with North Sydney's Strategic Direction

Half of businesses are satisfied with North Sydney's strategic direction, though it has dropped compared to 2020. Females are more likely to be satisfied with the strategic direction than males.
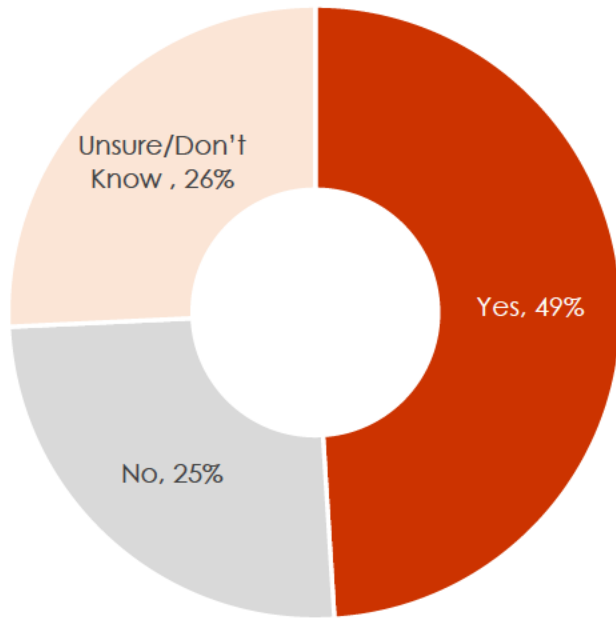


**Year on Year Trend**
Satisfaction with North Sydney's Strategic Direction

| 2010 | 2013 | 2016 | 2020 | 2023 |
|------|------|------|------|------|
| 45%  | 47%  | 56%  | 68%  | 49%  |

| | Overall | Gender | | Ward | |
|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal |
| Yes | 49% | 39% | 61% | 48% | 50% |
| Base | 202 | 109 | 92 | 83 | 119 |

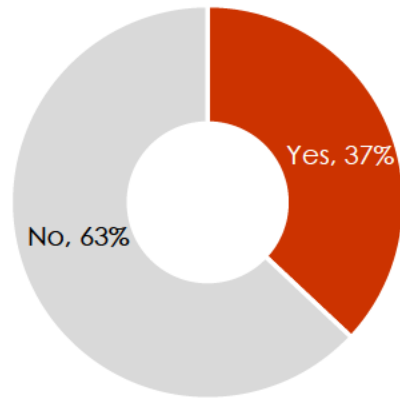| | Number of employees | | Business Type | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 0-5 | 6 or more | Property and business services | Health and community services | Retail trade | Accommodation, cafes, and restaurants | Finance and insurance | Other businesses |
| Yes | 45% | 56% | 47% | 55% | 53% | 53% | 71% | 36% |
| Base | 123 | 79 | 43 | 38 | 30 | 19 | 17 | 55 |

Base: N = 202

*Q4. Are you satisfied with North Sydney's strategic direction? i.e., the way Council balances the environmental, social, economic, and civic leadership objectives of the community it serves.*

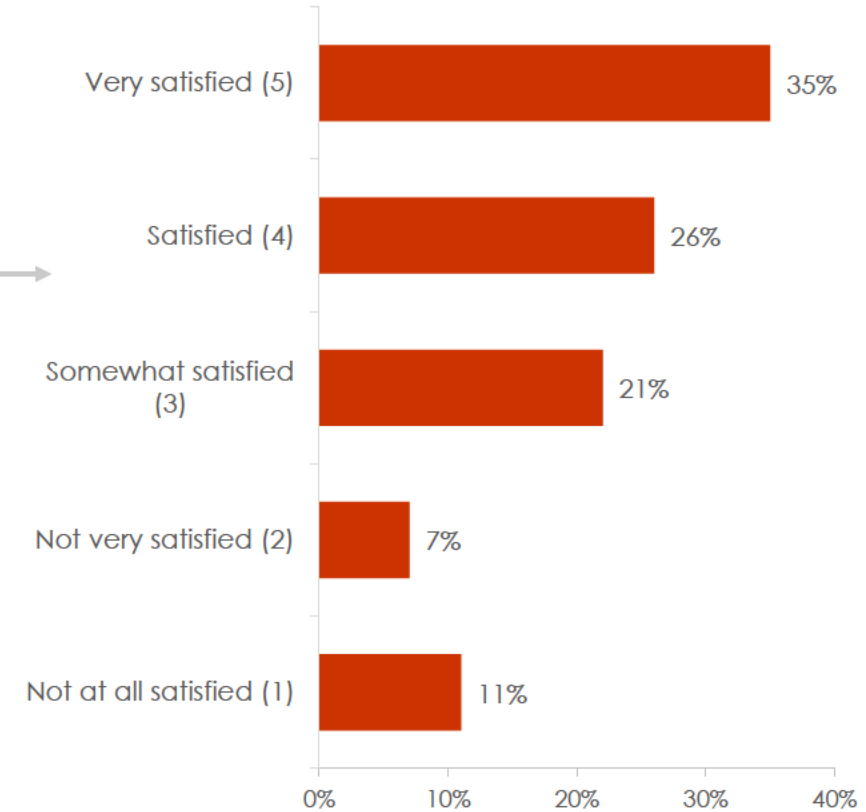A significantly higher/lower percentage/number (by group)

45

# Conducting Business with Council

37% of businesses had conducted business with North Sydney Council in the last 12 months, with 82% of those businesses being at least somewhat satisfied with the ease of conducting business.

Yes, 37%

No, 63%

Base: N = 202

| | Overall | Gender | | Ward | |
|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal |
| Yes | 37% | 35% | 38% | 35% | 38% |
| Base | 202 | 109 | 92 | 83 | 119 |

| | Number of employees | | Business Type | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 0-5 | 6 or more | Property and business services | Health and community services | Retail trade | Accommodation, cafes, and restaurants | Finance and insurance | Other businesses |
| Yes | 37% | 37% | 44% | 21% | 37% | 58% | 29% | 36% |
| Base | 123 | 79 | 43 | 38 | 30 | 19 | 17 | 55 |

Very satisfied (5) — 35%

Satisfied (4) — 26%

Somewhat satisfied (3) — 21%

Not very satisfied (2) — 7%

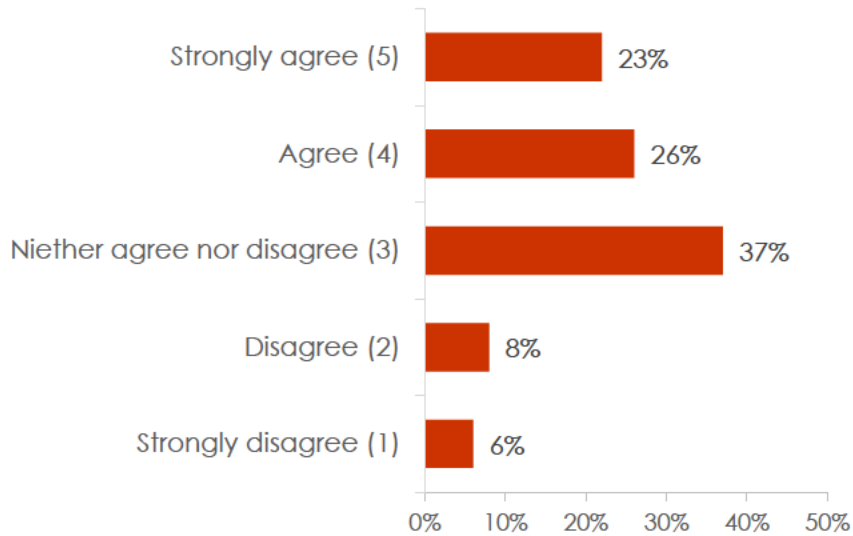Not at all satisfied (1) — 11%

Base: N = 74

*Q8a. Have you conducted business with North Sydney Council in the last 12 months?*
*Q8b. Please rate your level of satisfaction with how easy it was to conduct the business on a scale of 1-5, where 1 is not at all satisfied and 5 is very satisfied?*

Scale: 1 = not at all satisfied, 5 = very satisfied
A significantly higher/lower percentage/number (by group)

46

# Attitude towards Council's Operating Process

49% of businesses agree or strongly agree that Council operates under ethical, open, accountable, and transparent processes. The mean rate has softened slightly compared to 2020. Businesses located in the Cammeraygal ward are significantly more likely to have positive attitudes towards Council's operating process.

Strongly agree (5) — 23%
Agree (4) — 26%
Niether agree nor disagree (3) — 37%
Disagree (2) — 8%
Strongly disagree (1) — 6%

|  | | Gender | | Ward | |
|---|---|---|---|---|---|
|  | Overall | Male | Female | St Leonards | Cammeraygal |
| Top 2 Box % | 49% | 43% | 57% | 40% | 55% |
| Mean rating | 3.51 | 3.34 | 3.72 | 3.23 | 3.71 |
| Base | 201 | 108 | 92 | 82 | 119 |

**Year on Year Trend**

|  | 2023 | 2020 |
|---|---|---|
| Mean rating | 3.51 | 3.66* |
| Base | 201 | 201 |

|  | Number of employees | | Business Type | | | | | |
|---|---|---|---|---|---|---|---|---|
|  | 0-5 | 6 or more | Property and business services | Health and community services | Retail trade | Accommodation, cafes, and restaurants | Finance and insurance | Other businesses |
| Top 2 Box % | 46% | 53% | 53% | 49% | 53% | 42% | 47% | 45% |
| Mean rating | 3.45 | 3.61 | 3.65 | 3.54 | 3.57 | 3.47 | 3.41 | 3.40 |
| Base | 122 | 79 | 43 | 37 | 30 | 19 | 17 | 55 |

Base: N = 201

Note: *This value was converted and calculated using 5 points scale

Q9. How strongly do you agree or disagree that Council operates under ethical, open, accountable and transparent processes? Please rate on a scale of 1-5, where 1 is strongly disagree and 5 is strongly agree?

Scale: 1 = strongly disagree, 5 = Strongly agree
A significantly higher/lower percentage/number by group

# Chamber of Business or Association

16% of businesses stated that they are part of a Chamber of Business or Association. Businesses with less employees (0-5) are more likely to be part of a Chamber of Business or Association than those with more employees (6 or more).

Unsure/Don't Know, 7%

Yes, 16%

No, 77%
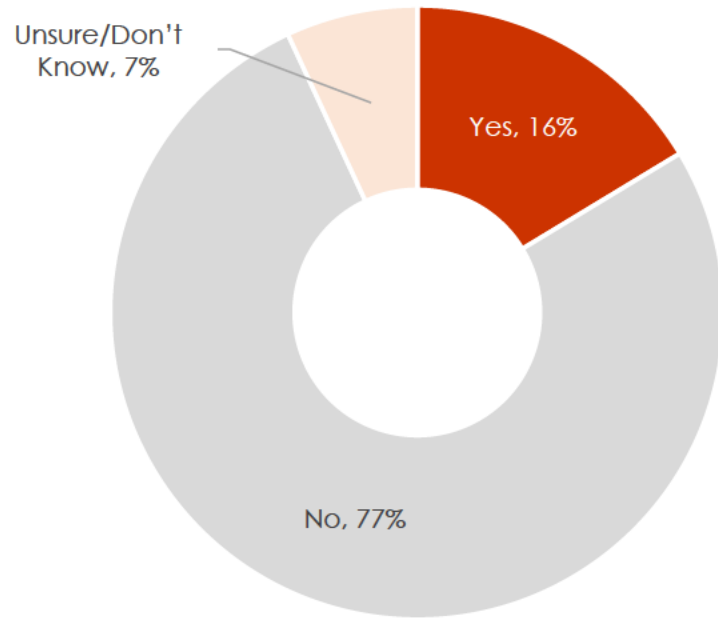
Base: N = 202

| | Overall | Gender | | Ward | |
|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal |
| Yes | 16% | 17% | 16% | 14% | 18% |
| Base | 202 | 109 | 92 | 83 | 119 |

| | Number of employees | | Business Type | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 0-5 | 6 or more | Property and business services | Health and community services | Retail trade | Accommodation, cafes, and restaurants | Finance and insurance | Other businesses |
| Yes | 12% | 23% | 12% | 21% | 7% | 21% | 18% | 20% |
| Base | 123 | 79 | 43 | 38 | 30 | 19 | 17 | 55 |

Q10. Is your business part of a Chamber of Business or Association?

A significantly higher/lower percentage/number (by group)    48

# Awareness of Streetscape Committees

In line with previous years, 21% of businesses are aware that Council has 'Streetscape Committees'. In addition, this figure has increased obviously compared with 2010 and 2013.

**Year on Year Trend**

Aware of Streetscape Committees



Base: N = 202
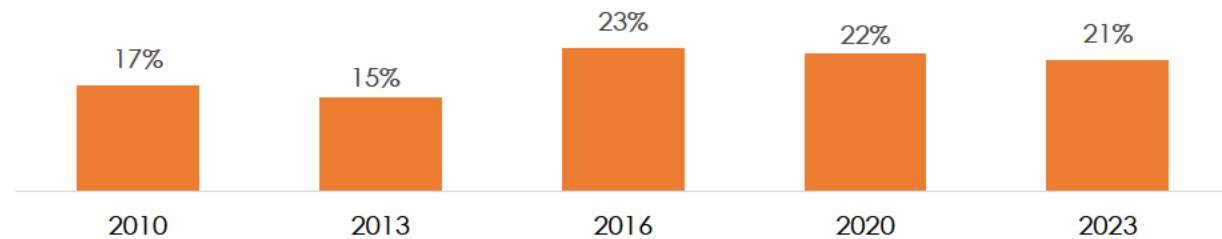
| | Overall | Gender | | Ward | |
|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal |
| Yes | 21% | 21% | 22% | 18% | 24% |
| Base | 202 | 109 | 92 | 83 | 119 |

| | Number of employees | | Business Type | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 0-5 | 6 or more | Property and business services | Health and community services | Retail trade | Accommodation, cafes, and restaurants | Finance and insurance | Other businesses |
| Yes | 24% | 16% | 21% | 13% | 23% | 42% | 12% | 22% |
| Base | 123 | 79 | 43 | 38 | 30 | 19 | 17 | 55 |

Q11. North Sydney Council has 'Streetscape Committees' for the Cremorne, Crows Nest, Kirribilli and Neutral Bay shopping areas, made up of residents and businesses who provide two-way feedback to Council about their local shopping area. Prior to me telling you this, were you aware that you had a local Streetscape Committee?

A significantly higher/lower percentage by group   49

# Precinct Committees

23% of businesses are aware of precinct committees, which is slightly higher than 2020. Businesses with less employees (0-5) are more likely to be aware of it than those with more employees (6 or more).

**Unsure/Don't Know, 2%**

Yes, 23%

No, 75%

Base: N = 202

## Year on Year Trend
### Awareness of Precinct Committees

| 2010 | 2013 | 2016 | 2020 | 2023 |
|------|------|------|------|------|
| 24% | 24% | 30% | 21% | 23% |

| | Overall | Gender | | Ward | |
|---|---------|--------|--------|------|---|
| | | Male | Female | St Leonards | Cammeraygal |
| Yes | 23% | 27% | 18% | 19% | 25% |
| Base | 202 | 109 | 92 | 83 | 119 |

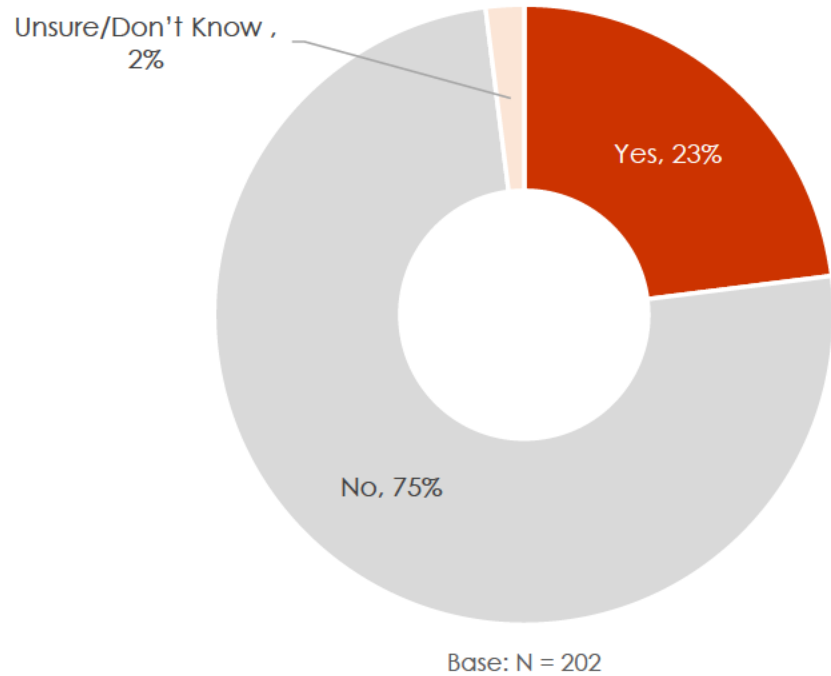| | Number of employees | | Business Type | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 0-5 | 6 or more | Property and business services | Health and community services | Retail trade | Accommodation, cafes, and restaurants | Finance and insurance | Other businesses |
| Yes | 28% | 14% | 16% | 21% | 20% | 47% | 12% | 25% |
| Base | 123 | 79 | 43 | 38 | 30 | 19 | 17 | 55 |

*Q12. The North Sydney Council area is split into 23 'Precinct Committees' made up of residents, students, workers, and businesses who discuss matters affecting their local area. Prior to me telling you this, were you aware that you had a local Precinct Committee? (Business)*

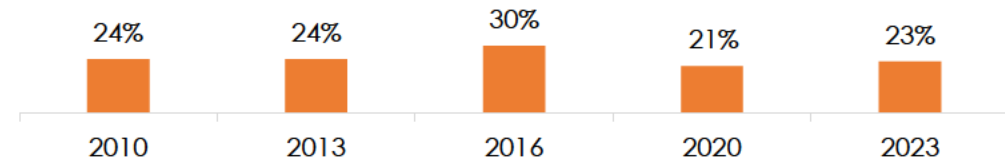A significantly higher/lower percentage by group

# Source of Information

Email is the most preferred way for businesses in North Sydney to get information about Council in 2023, while e-newsletters are less preferred compared to 2020*.

| Source | 2023 | 2020 |
|---|---|---|
| Email from Council | 50% | 25% |
| Brochures/leaflets | 11% | 9% |
| e-newsletters | 10% | 34% |
| Council newsletters (North Sydney News) | 7% | 9% |
| Council website | 5% | 12% |
| Weekly email newsletter | 4% | |
| Local Newspaper (Mosman Daily, North Shore Times, North Shore Living) | 2% | 1% |
| With rates notice | 1% | |
| Ad in a local paper | 1% | |
| Word of mouth | 1% | |
| Via phone call to Council's Customer Service staff | <1% | |
| Other | 5% | |

■ 2023 (N=202)  ■ 2020 (N=201)
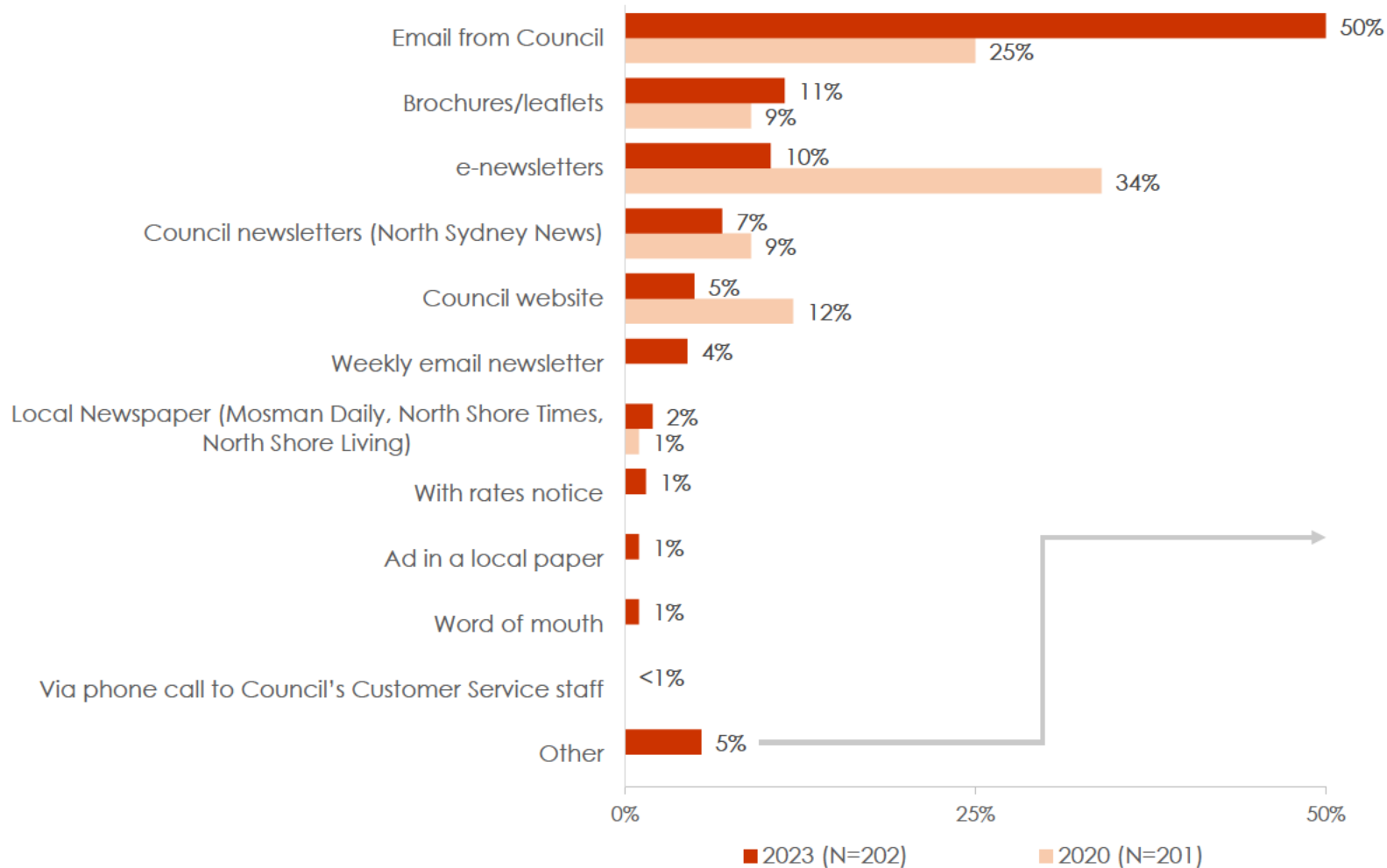
| Other specified | N=202 |
|---|---|
| Mail/Letter | 4% |
| SMS | <1% |
| APP | <1% |

*Note: New options added this year, 2020 data is shown as an interest point only.

Q13a. What is your preferred source or method of receiving information relating to what North Sydney Council does? (Business)

# High Priority Areas for the Next 10 Years

Businesses identified traffic congestion and parking issues as key areas of concern for the next 10 years. Other areas include; managing development, environmental preservation and business support.

**Example Verbatims**

"Road and transport network flow e.g. in Crows Nest with the new developments"

"More commercial and residential buildings."

"Parking dramatically effects the small businesses in the LGA."

"Provide support to small businesses to help them operate efficiently"

"Balancing development with open spaces, parks and gardens, and living space for people who work in the area and residents"

| Priority Area | % |
|---|---|
| Traffic management/congestion | 29% |
| Parking availability/affordability | 29% |
| More development planning | 15% |
| Preservation of green spaces/bushland/open spaces | 15% |
| More support for local businesses e.g. incentives, policies, consultations | 11% |
| Managing overdevelopment | 10% |
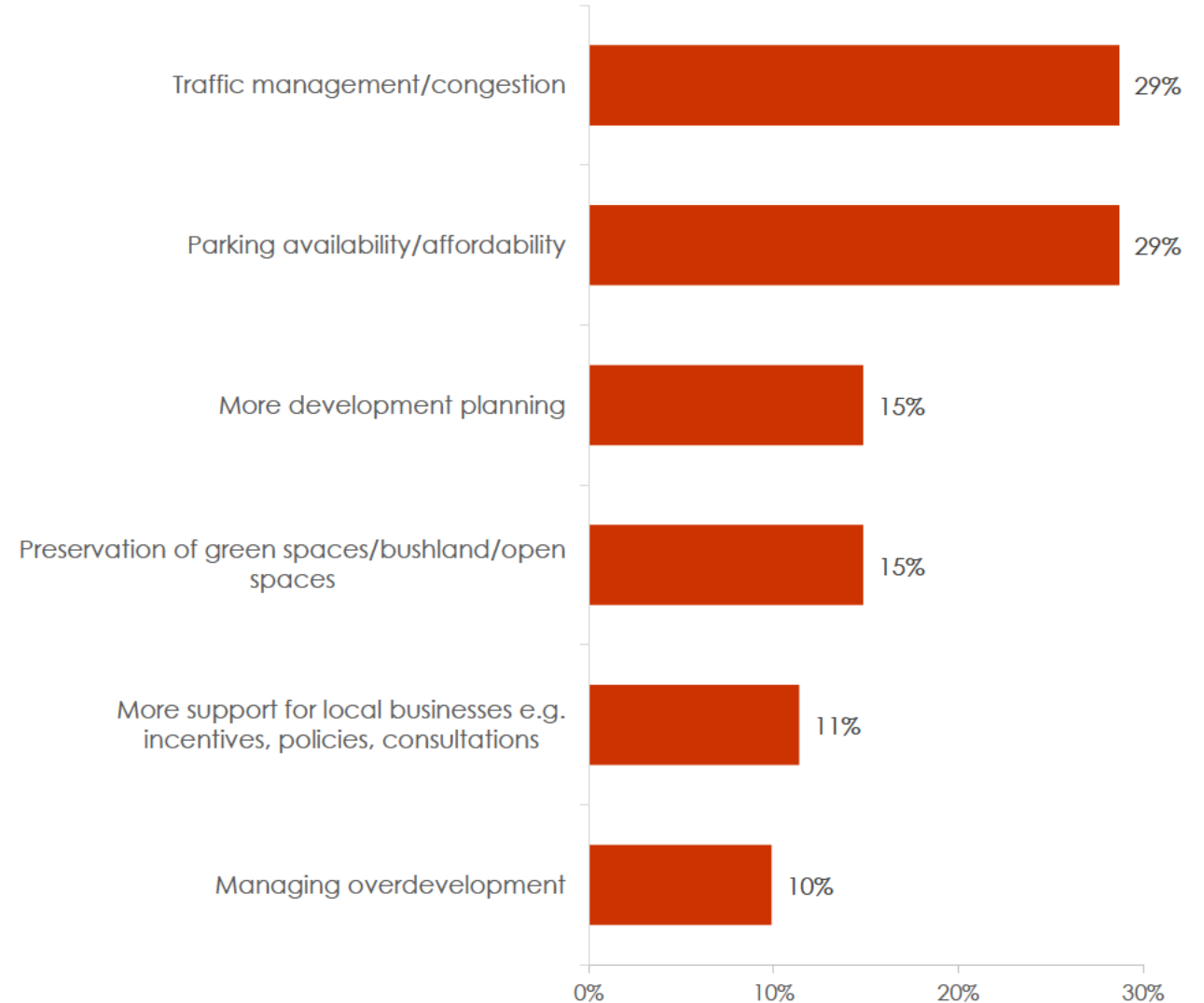
Base: N = 202

Q14. Thinking about the next 10 years, what do you believe will be the highest priority issues within the North Sydney Council area?

Please see Appendix 1 for full list of responses

**Section 2b:**

## Businesses Satisfaction with Council

## Section 2b
## (Business)

micromex
research

# Overall Satisfaction – Business

89% of businesses are at least somewhat satisfied with Council's performance over the past 12 months, while the mean rate has softened slightly compared to 2020. Females are more likely to be satisfied.



Very satisfied (5) — 12%
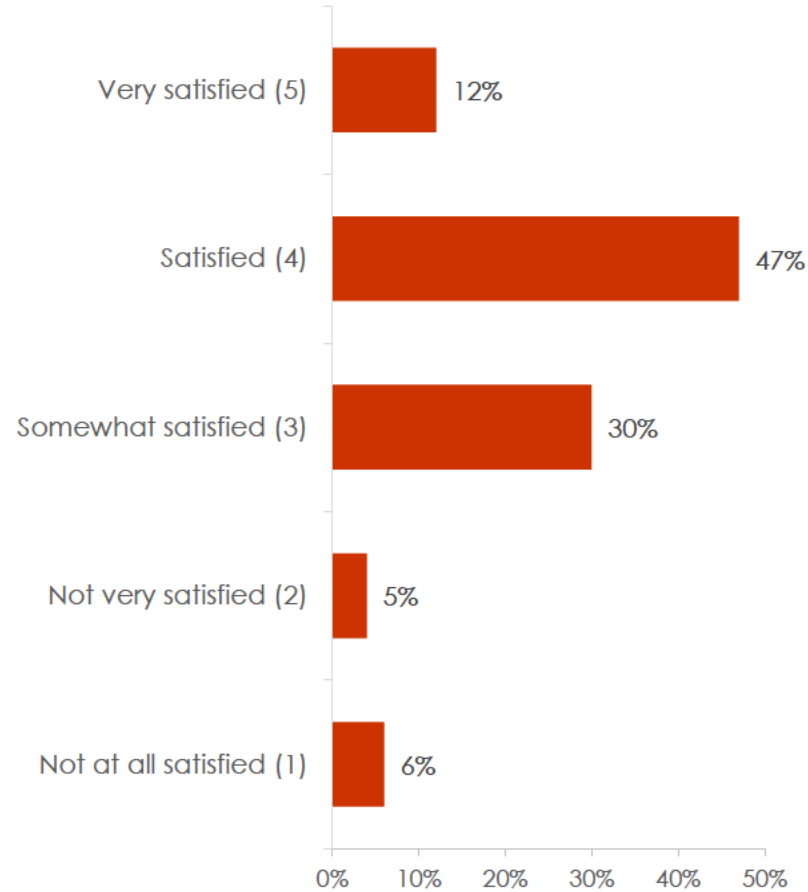Satisfied (4) — 47%
Somewhat satisfied (3) — 30%
Not very satisfied (2) — 5%
Not at all satisfied (1) — 6%

### Year on Year Trend

|  | 2023 | 2020 |
|---|---|---|
| Mean rating | 3.54 | 3.65* |
| Base | 202 | 201 |

|  | Overall | Gender | | Ward | |
|---|---|---|---|---|---|
|  |  | Male | Female | St Leonards | Cammeraygal |
| Top 3 Box % | 89% | 84% | 95% | 86% | 92% |
| Mean rating | 3.54 | 3.35 | 3.76 | 3.40 | 3.64 |
| Base | 202 | 109 | 92 | 83 | 119 |

|  | Number of employees | | Business Type | | | | | |
|---|---|---|---|---|---|---|---|---|
|  | 0-5 | 6 or more | Property and business services | Health and community services | Retail trade | Accommodation, cafes, and restaurants | Finance and insurance | Other businesses |
| Top 3 Box % | 88% | 91% | 84% | 95% | 87% | 84% | 100% | 89% |
| Mean rating | 3.49 | 3.62 | 3.42 | 3.71 | 3.47 | 3.42 | 4.00 | 3.45 |
| Base | 123 | 79 | 43 | 38 | 30 | 19 | 17 | 55 |

Base: N = 202
Note: *This value was converted and calculated using 5 points scale
Q5a. Thinking about all the services your council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 5 where 1 means not at all satisfied and 5 is very satisfied. (Business)

Scale: 1 = not at all satisfied, 5 = very satisfied
A significantly higher/lower percentage/number by group

# Council Services and Facilities – Business

A major component of the 2023 Business Survey was to assess perceived Importance of, and Satisfaction with 16 Council-provided services and facilities – the equivalent of 32 separate questions!

We have utilised the following techniques to summarise and analyse these 32 questions:
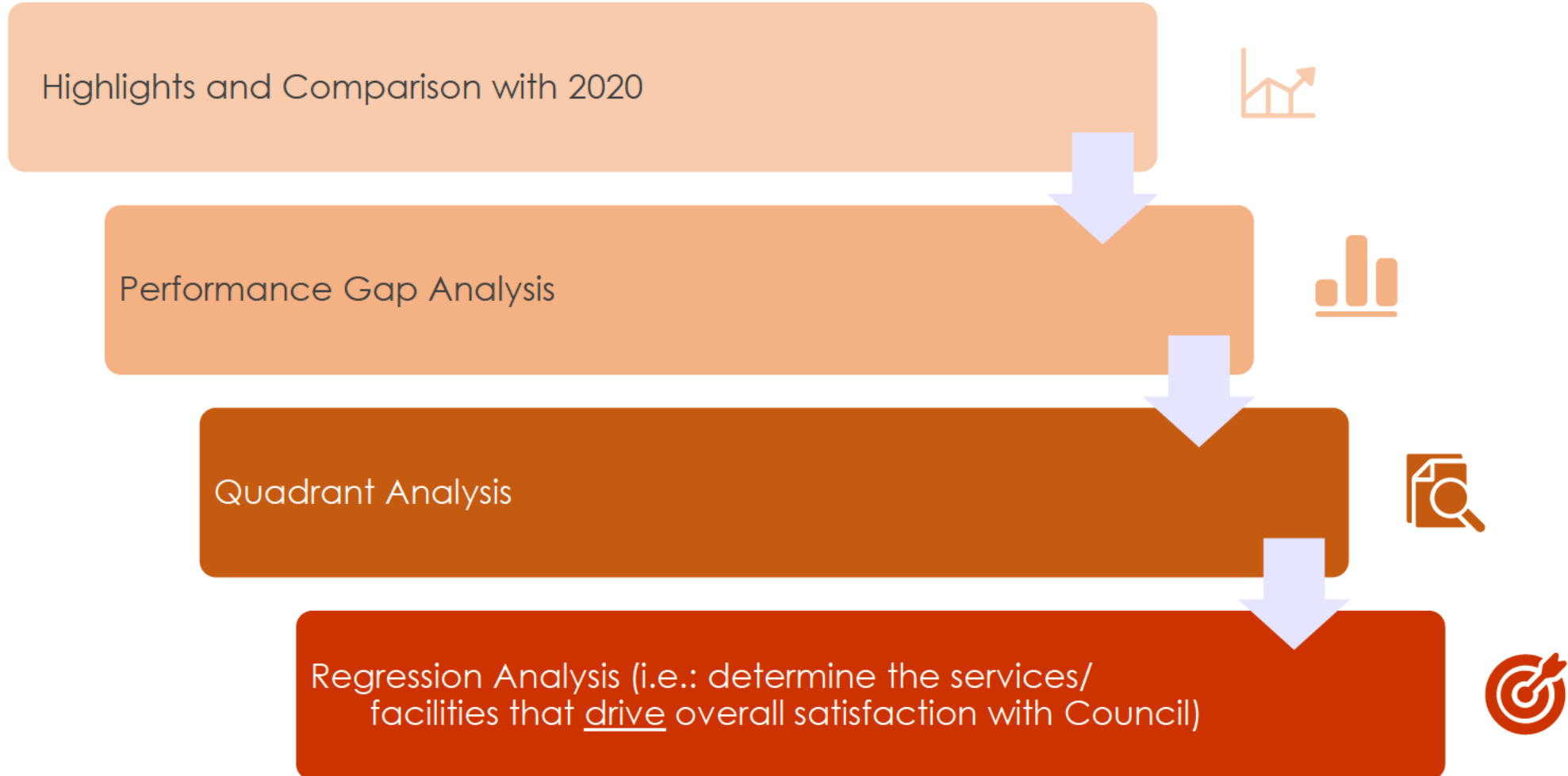
Highlights and Comparison with 2020

Performance Gap Analysis

Quadrant Analysis

Regression Analysis (i.e.: determine the services/ facilities that <u>drive</u> overall satisfaction with Council)

# Importance & Satisfaction – Highest/Lowest Rated Services/Facilities

A core element of this community survey was the rating of 16 facilities/services in terms of Importance and Satisfaction. The analysis below identifies the highest and lowest rated services/facilities in terms of importance and satisfaction.

## Importance

The following services/facilities received the highest T2 box importance ratings:

| Higher importance | T2 Box | Mean |
|---|---|---|
| Provision of parking | 93% | 4.68 |
| Long term planning | 93% | 4.63 |
| Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas | 90% | 4.54 |
| Cleanliness of local roads and footpaths | 88% | 4.41 |
| Managing development/town planning | 88% | 4.47 |
| Maintenance of local roads | 88% | 4.49 |

The following services/facilities received the lowest T2 box importance ratings:

| Lower importance | T2 Box | Mean |
|---|---|---|
| Building height and town centres | 71% | 4.04 |
| Appearance of public spaces in the North Sydney CBD (public domain) | 73% | 4.01 |
| Maintenance of plazas in commercial areas | 75% | 4.02 |
| Environmental and sustainability initiatives | 77% | 4.14 |
| Appearance of local village centres | 79% | 4.17 |

T2B = important/very important
Scale: 1 = not at all important, 5 = very important

## Satisfaction

The following services/facilities received the highest T3 box satisfaction ratings:

| Higher satisfaction | T3 Box | Mean |
|---|---|---|
| Cleanliness of local roads and footpaths | 92% | 3.90 |
| Appearance of public spaces in the North Sydney CBD (public domain) | 92% | 3.73 |
| Maintenance of plazas in commercial areas | 90% | 3.69 |
| Appearance of local village centres | 87% | 3.65 |
| Maintenance of footpaths | 85% | 3.57 |
| Environmental and sustainability initiatives | 85% | 3.47 |

The following services/facilities received the lowest T3 box satisfaction ratings:

| Lower satisfaction | T3 Box | Mean |
|---|---|---|
| Provision of parking | 53% | 2.56 |
| Communication with local businesses | 65% | 2.95 |
| Consultation with the business community | 67% | 2.97 |
| Building height and town centres | 69% | 3.02 |
| Managing development/town planning | 73% | 3.05 |

T3B = somewhat satisfied/satisfied/very satisfied
Scale: 1 = not at all satisfied, 5 = very satisfied

# Services and Facilities – <u>Satisfaction</u>: Comparison by Year

The below chart compares the mean satisfaction ratings for 2023 vs 2020.

Satisfaction did not significantly increase for any of the services and facilities, while there was significant decreases in satisfaction for 4 services and facilities.

**2023 Satisfaction Ratings** (y-axis)

Maintenance of plazas in commercial areas    (0.01)

Cleanliness of local roads and footpaths (e.g. street sweeping)    (-0.10)
Maintenance of footpaths and local roads    (-0.16)
Appearance of local village centres (public domain/streetscape)    (-0.17)
Customer service/information provided by Council staff    (-0.22)
Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas    (-0.22)
Provision of parking (commercial areas, residential areas) (e.g., policing, residents parking, parking facilities, restrictions, parking in shopping areas)    (-0.32)
Managing development/town planning (land use planning)    (-0.50)

⬆⬇ = A significantly higher/lower level of satisfaction (compared to 2020)

**2020 Satisfaction Ratings** (x-axis)

Note: 2020 values were converted and calculated using 5 points scale
* Maintenance of footpaths and local roads were merged for comparison with 2020

# Performance Gap Analysis – Business

When we examine the largest performance gaps, we can identify that all of the services or facilities have been rated as high in importance, whilst resident satisfaction for all of these areas is between 53% and 77%.

Provision of parking and traffic, communication/consultation with businesses, long-term planning/development management had the largest performance gaps.

| Service Area | Service/Facility | Importance T2 Box | Satisfaction T3 Box | Performance Gap (Importance – Satisfaction) |
|---|---|---|---|---|
| Infrastructure & Transport | Provision of parking | 93% | 53% | 40% |
| Leadership & Customer Service | Communication with local businesses | 83% | 65% | 18% |
| Development | Managing development/town planning | 88% | 73% | 16% |
| Development | Long term planning | 93% | 77% | 16% |
| Infrastructure & Transport | Management of traffic flow on local roads in commercial and residential areas | 90% | 75% | 15% |
| Leadership & Customer Service | Consultation with the business community | 81% | 67% | 15% |
| Infrastructure & Transport | Maintenance of local roads | 88% | 84% | 4% |
| Open space & Environment | Waste and recycling collection services | 84% | 80% | 4% |
| Infrastructure & Transport | Maintenance of footpaths | 87% | 85% | 2% |
| Development | Building height and town centres | 71% | 69% | 2% |
| Leadership & Customer Service | Customer service/information provided by Council staff | 81% | 83% | -3% |
| Infrastructure & Transport | Cleanliness of local roads and footpaths | 88% | 92% | -4% |
| Open space & Environment | Environmental and sustainability initiatives | 77% | 85% | -7% |
| Infrastructure & Transport | Appearance of local village centres | 79% | 87% | -9% |
| Infrastructure & Transport | Maintenance of plazas in commercial areas | 75% | 90% | -15% |
| Infrastructure & Transport | Appearance of public spaces in the North Sydney CBD | 73% | 92% | -19% |

**Note**: Performance gap is the first step in the process, we now need to identify comparative ratings across all services and facilities to get an understanding of relative importance and satisfaction at an LGA level. This is when we undertake step 2 of the analysis.

**Business**

**Improve**
Higher importance, lower satisfaction

**Maintain**
Higher importance, higher satisfaction

**Niche**
Lower importance, lower satisfaction

**Social Capital**
Lower importance, higher satisfaction

Importance

Satisfaction

North Sydney Council Average

Provision of parking (53%, 93%)

Long term planning

Management of traffic flow

Cleanliness of local roads and footpaths

Maintenance of local roads

Communication with local businesses

Managing development/town planning

Waste and recycling collection services

Maintenance of footpaths

Customer service/information provided by Council staff

Consultation with the business community

Appearance of local village centres

Environmental and sustainability initiatives

Maintenance of plazas in commercial areas

Building height and town centres

Appearance of public spaces in the North Sydney CBD

59

# Key Drivers of Overall Satisfaction with Council – Business

The score assigned to each area indicates the percentage of influence each measure contributes to overall satisfaction with Council. If Council can increase satisfaction in these areas, it will improve overall satisfaction.
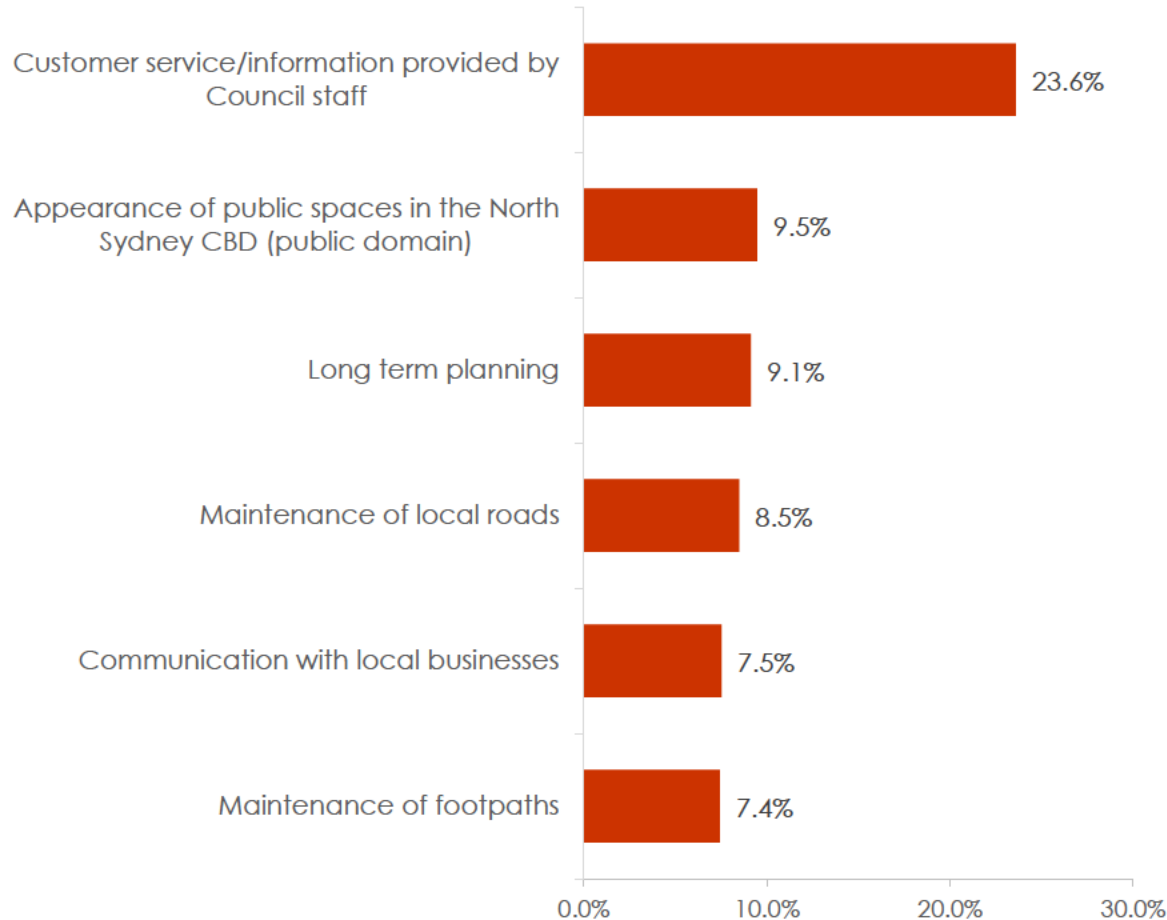
Customer service/information provided by Council staff — 23.6%

Appearance of public spaces in the North Sydney CBD (public domain) — 9.5%

Long term planning — 9.1%

Maintenance of local roads — 8.5%

Communication with local businesses — 7.5%

Maintenance of footpaths — 7.4%

The results in the chart to the left identify which services/facilities contribute most to overall satisfaction. If Council can improve satisfaction scores across these services/facilities, they are likely to improve their overall satisfaction score.

These top 6 services/facilities (so 38% of the 16 services/facilities) account for over 60% of the variation in overall satisfaction. Therefore, whilst all 16 services/facilities are important, only a number of them are potentially significant drivers of satisfaction (at this stage, the other 10 services/facilities have less impact on satisfaction – although if resident satisfaction with them was to suddenly change they may have more immediate impact on satisfaction).
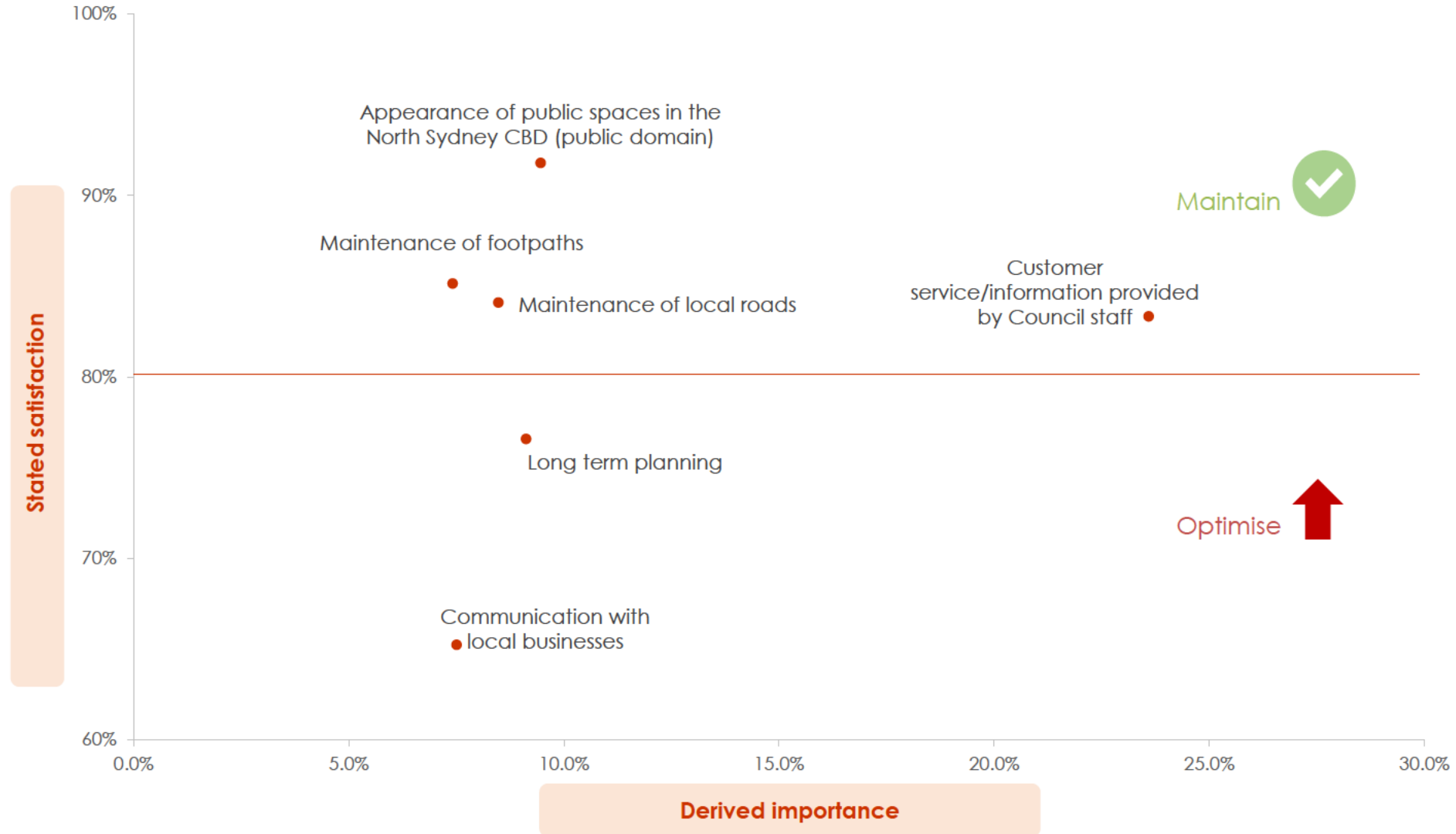
$R^2$ value = 0.505

**Dependent Variable:** Q5a. Thinking about all the services your council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 5 where 1 means not at all satisfied and 5 is very satisfied. (Business)

# Mapping Stated Satisfaction and Derived Importance Identifies the Community Priority Areas – Business

The below chart looks at the relationship between stated satisfaction (top 3 box) and derived importance (Regression result) to identify the level of contribution of each measure.

Any services/facilities below the blue line (shown above) could potentially be benchmarked to target in future research to elevate satisfaction levels in these areas.



**Stated satisfaction** (y-axis, 60% to 100%)

**Derived importance** (x-axis, 0.0% to 30.0%)

- Appearance of public spaces in the North Sydney CBD (public domain)
- Maintenance of footpaths
- Maintenance of local roads
- Customer service/information provided by Council staff
- Long term planning
- Communication with local businesses

Maintain ✓

Optimise

# Contribution to Overall Satisfaction with Council's Performance – Business

By combining the outcomes of the regression data, we can identify the derived importance of the different Nett Priority Areas.

'Leadership & Customer service' (38.2%) are the key contributors toward overall satisfaction with Council's performance, with an average contribution of 12.7%.
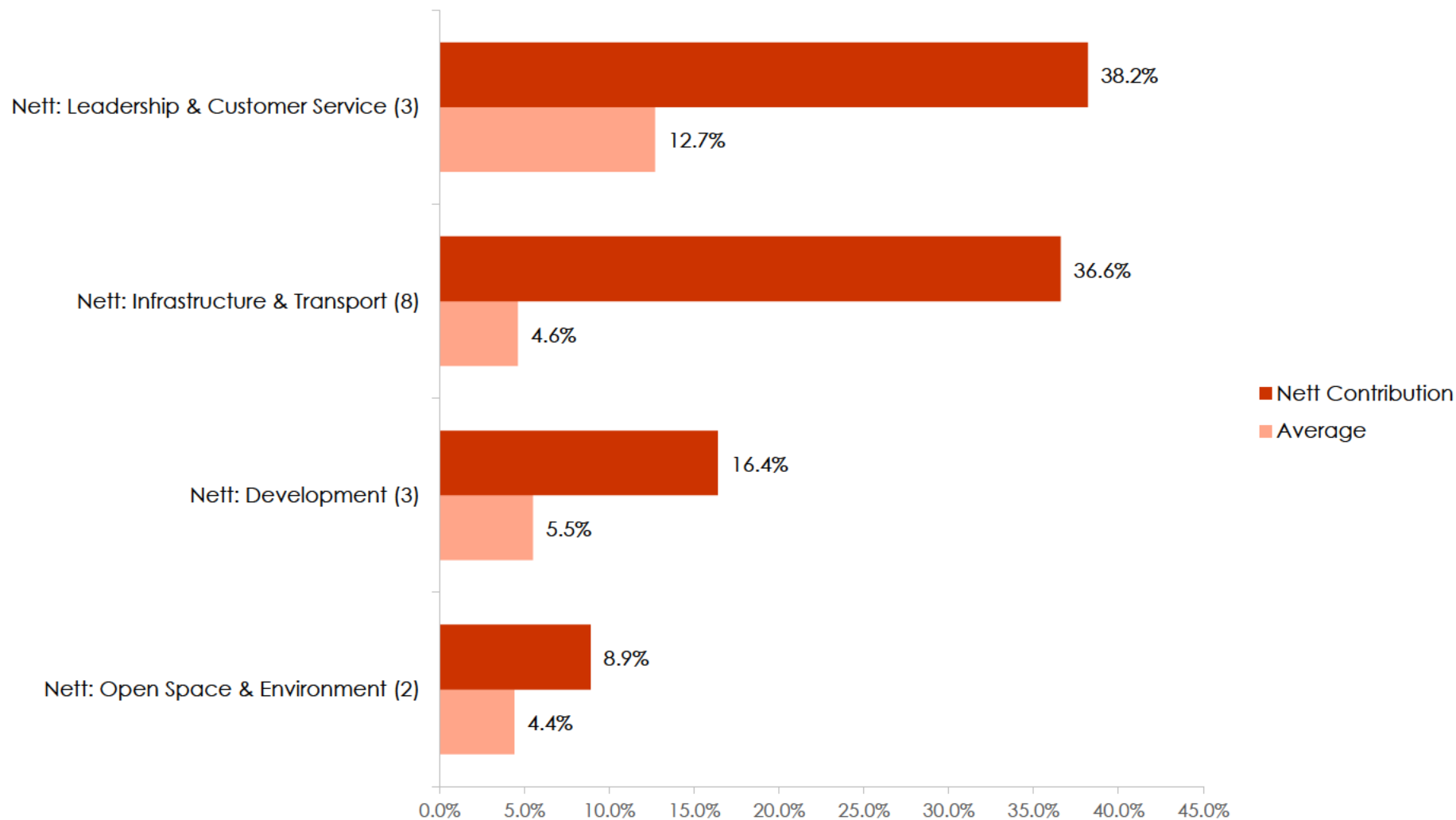


Legend:
- ■ Nett Contribution
- ■ Average

Nett: Leadership & Customer Service (3): Nett Contribution 38.2%, Average 12.7%
Nett: Infrastructure & Transport (8): Nett Contribution 36.6%, Average 4.6%
Nett: Development (3): Nett Contribution 16.4%, Average 5.5%
Nett: Open Space & Environment (2): Nett Contribution 8.9%, Average 4.4%

Note: Numbers in brackets represent the number of services/facilities within each service area

# Reasons for Low Satisfaction

Better parking availability, maintenance of roads (e.g. potholes) and uneven surface of footpaths are the common reasons for low satisfaction for businesses.

## Business (N=202)

### Provision of parking (including restrictions, resident parking, ETC)

| Top reasons | N=88 |
|---|---|
| Limited parking availability general | 72% |
| Parking fees/fines | 32% |
| Too many restricted parking areas with insufficient parking time | 23% |
| Roads/footpaths/cycle paths/road infrastructure limiting parking space | 7% |

### Maintenance of the local roads

| Top reasons | N=28 |
|---|---|
| Maintenance of roads e.g. potholes | 61% |
| Unsafe roads | 14% |
| Lack of drainage/Dodgy drains | 11% |
| Roadworks taking too long | 11% |

### Maintenance of the local footpaths

| Top reasons | N=24 |
|---|---|
| Uneven surface e.g. tree roots, cracked | 73% |
| Lack of maintenance/repairs taking too long | 42% |
| Safety | 31% |
| Cleanliness | 19% |
| Poor footpath condition that impacts businesses | 19% |

Q9a/Q7a. What particular aspects of 'PROVISION OF PARKING (INCLUDING RESTRICTIONS, RESIDENT PARKING, ETC) do you find unsatisfactory? (Resident/Business)
Q9b/Q7b. What particular aspects of 'MAINTENANCE OF THE LOCAL ROADS' do you find unsatisfactory? (Resident/Business)
Q9c/Q7c. What particular aspects of 'MAINTENANCE OF THE LOCAL FOOTPATHS' do you find unsatisfactory? (Resident/Business)

Please see Appendix 1 for full list of responses    63

**Appendix 1:**

# Additional Analyses (Resident)

**Appendix 1**

# Most Valued Aspects

| | N=401 | | N=401 |
|---|---|---|---|
| Close to CBD/City | 26% | Entertainment and dining options | 2% |
| Open spaces/parks/trees etc | 21% | Village atmosphere/community feel | 1% |
| Public transport | 10% | Close to friends and/or family | 1% |
| Convenience general | 8% | Not overdeveloped | 1% |
| Quiet/peaceful/safe | 7% | Local schools | 1% |
| Services/community facilities | 7% | Born here/been here a long time/know the area | 1% |
| Friendly people/great community spirit | 5% | Range/quality of shopping | 1% |
| Close to jobs, universities | 3% | Advancement of the area | <1% |
| Attractive houses/streets/neighbourhood | 3% | Unspecified | <1% |
| Nice views/harbour area | 2% | | |

*Q6a. What do you value MOST about living in the North Sydney Council area? (Resident)*

65

# Source of information – Resident

| | Overall | Gender | | Ward | | Ratepayer Status | |
|---|---|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal | Ratepayer | Non-ratepayer /Other |
| Email from Council | 16% | 14% | 18% | 18% | 14% | 17% | 14% |
| Council website | 16% | 17% | 14% | 14% | 17% | 14% | 18% |
| Brochures/leaflets | 12% | 12% | 12% | 12% | 12% | 13% | 11% |
| Council newsletters | 11% | 13% | 10% | 12% | 10% | 13% | 9% |
| Council's social media | 9% | 6% | 12% | 10% | 8% | 4% | 18% |
| e-newsletters | 7% | 8% | 7% | 6% | 8% | 8% | 6% |
| Local Newspaper | 6% | 4% | 7% | 4% | 7% | 8% | 2% |
| Weekly email newsletter | 4% | 5% | 4% | 3% | 6% | 4% | 5% |
| Community notice boards | 3% | 3% | 3% | 2% | 5% | 2% | 5% |
| Word of mouth | 2% | 4% | 1% | 2% | 3% | 2% | 2% |
| With rates notice | 1% | 2% | 0% | 2% | 1% | 2% | 0% |
| Ad in a local paper | 1% | 0% | 2% | 2% | 1% | 2% | 0% |
| Via phone call to Council's Customer Service staff | 1% | 1% | 0% | 0% | 2% | 1% | 1% |
| Posters at Council facilities | 1% | 0% | 1% | 2% | 0% | 1% | 1% |
| Council meetings | <1% | <1% | <1% | <1% | 1% | 1% | 0% |
| Local radio | <1% | <1% | <1% | <1% | 0% | <1% | 0% |
| Other | 8% | 9% | 8% | 10% | 7% | 9% | 7% |
| Base | 401 | 186 | 215 | 203 | 197 | 252 | 149 |

Base: N = 401

*Q16a. What is your preferred source of information relating to what North Sydney Council does? (Resident)*

A significantly higher/lower percentage by group

# Source of information – Resident

| | Overall | Age | | | | Time lived in Council area | |
|---|---|---|---|---|---|---|---|
| | | 18-34 | 35-49 | 50-59 | 60+ | 10 years or less | Over 10 years |
| Email from Council | 16% | 15% | 12% | 21% | 19% | 16% | 16% |
| Council website | 16% | 18% | 15% | 25% | 8% | 20% | 13% |
| Brochures/leaflets | 12% | 12% | 9% | 9% | 17% | 9% | 14% |
| Council newsletters | 11% | 5% | 12% | 10% | 18% | 8% | 13% |
| Council's social media | 9% | 13% | 13% | 8% | 1% | 15% | 5% |
| e-newsletters | 7% | 6% | 11% | 8% | 5% | 5% | 9% |
| Local Newspaper | 6% | 0% | 4% | 3% | 15% | 2% | 9% |
| Weekly email newsletter | 4% | 7% | 6% | 1% | 2% | 7% | 2% |
| Community notice boards | 3% | 7% | 2% | 0% | 1% | 2% | 4% |
| Word of mouth | 2% | 0% | 4% | 3% | 3% | 1% | 3% |
| With rates notice | 1% | 0% | 3% | 0% | 1% | 1% | 2% |
| Ad in a local paper | 1% | 2% | 0% | 0% | 1% | 2% | <1% |
| Via phone call to Council's Customer Service staff | 1% | 1% | 0% | 0% | 2% | 0% | 1% |
| Posters at Council facilities | 1% | 2% | 0% | 1% | 0% | 2% | <1% |
| Council meetings | <1% | 0% | 0% | 2% | <1% | 0% | 1% |
| Local radio | <1% | 0% | 0% | 0% | 1% | <1% | <1% |
| Other | 8% | 11% | 8% | 5% | 7% | 9% | 8% |
| Base | 401 | 125 | 112 | 53 | 110 | 165 | 236 |

Base: N = 401

*Q16a. What is your preferred source of information relating to what North Sydney Council does? (Resident)*

A significantly higher/lower percentage by group

# Importance Compared to the Group 3 Benchmark – Resident

| Service/Facility | North Sydney Council T2 box importance score | Group 3 Benchmark T2 box importance score | Variance | Metro Benchmark T2 box importance score | Variance |
|---|---|---|---|---|---|
| Range of arts and cultural experiences in North Sydney | 65%▲ | 51% | 14% | 52% | 12% |
| Maintenance of parks, playgrounds, bushland areas, and recreation areas | 96%▲ | 84% | 12% | 85% | 11% |
| Recreation facilities and amenities (e.g. sporting fields, North Sydney Indoor Sports Centre, MacCallum Pool) | 82% | 74% | 8% | 76% | 6% |
| Environmental and sustainability initiatives | 82% | 74% | 8% | 74% | 8% |
| Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc. | 96% | 89% | 7% | 89% | 7% |
| Consultation with the community | 82% | 76% | 6% | 78% | 4% |
| Communication with residents | 86% | 80% | 6% | 81% | 5% |
| Building height and town centres | 68% | 63% | 5% | 63% | 5% |
| Cleanliness of local roads and footpaths (e.g. street sweeping) | 90% | 86% | 4% | 84% | 6% |
| Maintenance of footpaths | 90% | 86% | 4% | 86% | 4% |
| Managing development/town planning (land use planning) | 85% | 82% | 3% | 82% | 3% |
| Long term planning | 90% | 87% | 3% | 88% | 2% |
| Waste and recycling collection services | 96% | 94% | 2% | 95% | 1% |
| Council run community events (e.g. Twilight Food Fair, the Childrens Festival, North Sydney Art Prize) | 61% | 60% | 1% | 61% | 0% |

**Note**: Benchmark differences are based on assumed variants of +/- 10%, with variants beyond +/- 10% more likely to be significant
▲▼ = positive/negative difference equal to/greater than 10% from Benchmark.

**Note**: T2 = important/very important   68

# Importance Compared to the Group 3 Benchmark – Resident

| Service/Facility | North Sydney Council T2 box importance score | Group 3 Benchmark T2 box importance score | Variance | Metro Benchmark T2 box importance score | Variance |
|---|---|---|---|---|---|
| Protection of low-rise residential area | 75% | 75% | 0% | 76% | -1% |
| Protecting bushland and enhancing canopy cover | 86% | 86% | 0% | 83% | 2% |
| Maintenance of local roads | 89% | 90% | -1% | 90% | -1% |
| Provision of parking (commercial areas, residential areas e.g., policing, residents parking, parking facilities, restrictions, parking in shopping areas) | 77% | 80% | -3% | 82% | -4% |
| Appearance of local village centres (public domain/streetscape) | 77% | 80% | -3% | 79% | -3% |
| Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas | 83% | 88% | -5% | 88% | -5% |
| Customer service/information provided by Council staff | 73% | 80% | -7% | 78% | -6% |
| Community centres and halls | 53% | 60% | -7% | 59% | -7% |
| Bus shelters | 63% | 72% | -9% | 67% | -4% |
| Stanton Library | 63%▼ | 73% | -10% | 72% | -9% |
| Appearance of public spaces in the North Sydney CBD (public domain) | 69%▼ | 80% | -11% | 79% | -10% |
| Maintenance of plazas in commercial areas | 64%▼ | 83% | -19% | 85% | -20% |
| Cycleways | 35%▼ | 55% | -20% | 53% | -18% |
| Wharves and boat ramps, dinghy/kayak storage etc | 25%▼ | 52% | -27% | 52% | -27% |

**Note**: Benchmark differences are based on assumed variants of +/- 10%, with variants beyond +/- 10% more likely to be significant
▲▼ = positive/negative difference equal to/greater than 10% from Benchmark.

**Note**: T2 = important/very important

# Satisfaction Compared to the Group 3 Benchmark – Resident

| Service/Facility | North Sydney Council T3 box satisfaction score | Group 3 Benchmark T3 box satisfaction score | Variance | Metro Benchmark T3 box satisfaction score | Variance |
|---|---|---|---|---|---|
| Cleanliness of local roads and footpaths (e.g. street sweeping) | 94%▲ | 82% | 12% | 82% | 13% |
| Maintenance of footpaths | 87%▲ | 75% | 12% | 74% | 13% |
| Provision of parking (commercial areas, residential areas e.g., policing, residents parking, parking facilities, restrictions, parking in shopping areas) | 72%▲ | 62% | 10% | 63% | 9% |
| Appearance of local village centres (public domain/streetscape) | 93% | 85% | 8% | 83% | 10% |
| Maintenance of local roads | 83% | 75% | 8% | 75% | 8% |
| Maintenance of plazas in commercial areas | 94% | 87% | 7% | 88% | 6% |
| Appearance of public spaces in the North Sydney CBD (public domain) | 91% | 85% | 6% | 83% | 8% |
| Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc. | 94% | 88% | 6% | 88% | 6% |
| Council run community events (e.g. Twilight Food Fair, the Childrens Festival, North Sydney Art Prize) | 96% | 90% | 6% | 91% | 5% |
| Consultation with the community | 80% | 75% | 5% | 76% | 5% |
| Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas | 77% | 72% | 5% | 72% | 5% |
| Protection of low-rise residential area | 72% | 68% | 4% | 67% | 5% |
| Communication with residents | 84% | 80% | 4% | 80% | 4% |
| Environmental and sustainability initiatives | 86% | 82% | 4% | 82% | 3% |

**Note**: Benchmark differences are based on assumed variants of +/- 10%, with variants beyond +/- 10% more likely to be significant
▲▼ = positive/negative difference equal to/greater than 10% from Benchmark.

**Note**: T3 = at least somewhat satisfied

# Satisfaction Compared to the Group 3 Benchmark – Resident

| Service/Facility | North Sydney Council T3 box satisfaction score | Group 3 Benchmark T3 box satisfaction score | Variance | Metro Benchmark T3 box satisfaction score | Variance |
|---|---|---|---|---|---|
| Maintenance of parks, playgrounds, bushland areas, and recreation areas | 95% | 91% | 4% | 91% | 4% |
| Community centres and halls | 94% | 90% | 4% | 90% | 3% |
| Stanton Library | 97% | 95% | 2% | 95% | 3% |
| Customer service/information provided by Council staff | 87% | 85% | 2% | 85% | 2% |
| Bus shelters | 88% | 87% | 1% | 85% | 3% |
| Managing development/town planning (land use planning) | 68% | 67% | 1% | 70% | -3% |
| Protecting bushland and enhancing canopy cover | 89% | 90% | -1% | 87% | 2% |
| Range of arts and cultural experiences in North Sydney | 87% | 88% | -1% | 86% | 1% |
| Waste and recycling collection services | 92% | 94% | -2% | 94% | -1% |
| Long term planning | 71% | 74% | -3% | 75% | -3% |
| Building height and town centres | 66% | 70% | -4% | 71% | -5% |
| Recreation facilities and amenities (e.g. sporting fields, North Sydney Indoor Sports Centre, MacCallum Pool) | 84% | 91% | -7% | 92% | -8% |
| Cycleways | 66% | 75% | -9% | 72% | -7% |
| Wharves and boat ramps, dinghy/kayak storage etc | 69%▼ | 89% | -20% | 89% | -20% |

**Note**: Benchmark differences are based on assumed variants of +/- 10%, with variants beyond +/- 10% more likely to be significant
▲▼ = positive/negative difference equal to/greater than 10% from Benchmark.

**Note**: T3 = at least somewhat satisfied

# Performance Gap Analysis – Resident

When analysing performance gap data, it is important to consider both stated satisfaction and the absolute size of the performance gap.
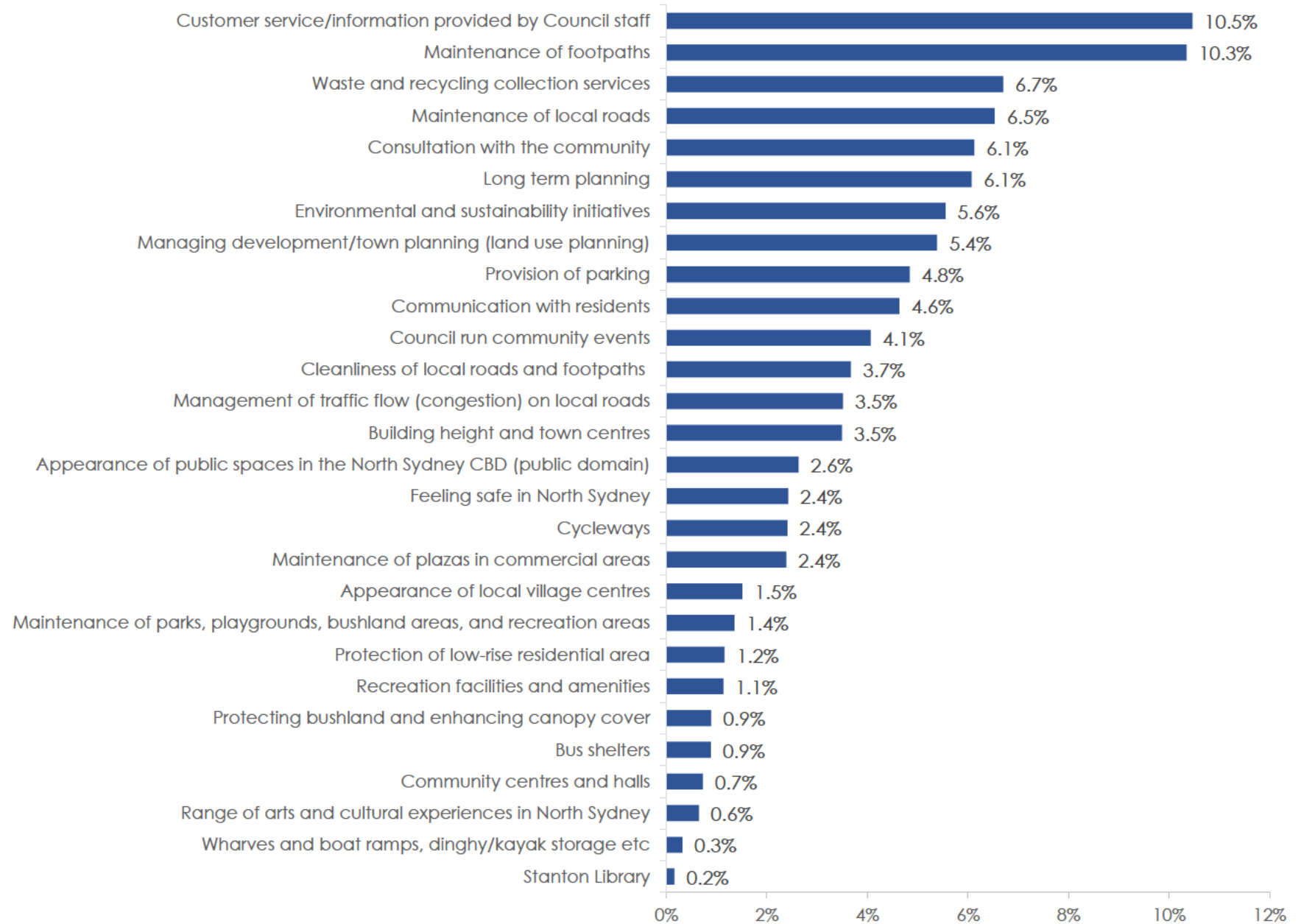
**Performance Gap Ranking**

| Service/Facility | Importance T2 Box | Satisfaction T3 Box | Performance Gap (Importance – Satisfaction) | Service/Facility | Importance T2 Box | Satisfaction T3 Box | Performance Gap (Importance – Satisfaction) |
|---|---|---|---|---|---|---|---|
| Long term planning | 90% | 71% | 18% | Cleanliness of local roads and footpaths | 90% | 94% | -4% |
| Managing development/town planning (land use planning) | 85% | 68% | 17% | Protecting bushland and enhancing canopy cover | 86% | 89% | -4% |
| Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas | 83% | 77% | 7% | Environmental and sustainability initiatives | 82% | 86% | -4% |
| Maintenance of local roads | 89% | 83% | 6% | Customer service/information provided by Council staff | 73% | 87% | -15% |
| Provision of parking | 77% | 72% | 5% | Appearance of local village centres | 77% | 93% | -16% |
| Maintenance of footpaths | 90% | 87% | 3% | Appearance of public spaces in the North Sydney CBD (public domain) | 69% | 91% | -22% |
| Waste and recycling collection services | 96% | 92% | 3% | Range of arts and cultural experiences in North Sydney | 65% | 87% | -22% |
| Protection of low-rise residential area | 75% | 72% | 3% | Bus shelters | 63% | 88% | -25% |
| Maintenance of parks, playgrounds, bushland areas, and recreation areas | 96% | 95% | 2% | Maintenance of plazas in commercial areas | 64% | 94% | -29% |
| Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc. | 96% | 94% | 2% | Cycleways | 35% | 66% | -30% |
| Building height and town centres | 68% | 66% | 2% | Stanton Library | 63% | 97% | -35% |
| Consultation with the community | 82% | 80% | 1% | Council run community events | 61% | 96% | -35% |
| Communication with residents | 86% | 84% | 1% | Community centres and halls | 53% | 94% | -41% |
| Recreation facilities and amenities | 82% | 84% | -1% | Wharves and boat ramps, dinghy/kayak storage etc. | 25% | 69% | -44% |

**Note:** T2 = important/very important
T3 = at least somewhat satisfied

The chart to the right summarises the influence of the 28 facilities/ services on overall satisfaction with Council's performance, based on the Regression analysis.

| Service | Influence |
|---|---|
| Customer service/information provided by Council staff | 10.5% |
| Maintenance of footpaths | 10.3% |
| Waste and recycling collection services | 6.7% |
| Maintenance of local roads | 6.5% |
| Consultation with the community | 6.1% |
| Long term planning | 6.1% |
| Environmental and sustainability initiatives | 5.6% |
| Managing development/town planning (land use planning) | 5.4% |
| Provision of parking | 4.8% |
| Communication with residents | 4.6% |
| Council run community events | 4.1% |
| Cleanliness of local roads and footpaths | 3.7% |
| Management of traffic flow (congestion) on local roads | 3.5% |
| Building height and town centres | 3.5% |
| Appearance of public spaces in the North Sydney CBD (public domain) | 2.6% |
| Feeling safe in North Sydney | 2.4% |
| Cycleways | 2.4% |
| Maintenance of plazas in commercial areas | 2.4% |
| Appearance of local village centres | 1.5% |
| Maintenance of parks, playgrounds, bushland areas, and recreation areas | 1.4% |
| Protection of low-rise residential area | 1.2% |
| Recreation facilities and amenities | 1.1% |
| Protecting bushland and enhancing canopy cover | 0.9% |
| Bus shelters | 0.9% |
| Community centres and halls | 0.7% |
| Range of arts and cultural experiences in North Sydney | 0.6% |
| Wharves and boat ramps, dinghy/kayak storage etc | 0.3% |
| Stanton Library | 0.2% |

# Reasons for Low Satisfaction – Resident

| Provision of parking | N=93 |
|---|---|
| Limited parking availability general | 64% |
| Parking fees/fines | 26% |
| Too many restricted parking areas/need longer parking time | 19% |
| Lack of parking rule enforcement | 9% |
| Zoning issues e.g. difficult for large vehicles to park | 7% |
| Too restricted to get parking permits | 6% |
| Need more short-term parking areas | 5% |
| Roads/footpaths/road infrastructure limiting parking space | 4% |
| Unfair parking regulation | 4% |
| Lack of charging points when parking | 1% |
| Lack of security e.g. no surveillance | 1% |
| Council does not response efficiently | 1% |
| Unsafety caused by congested parking | 1% |

| Maintenance of the local roads | N=59 |
|---|---|
| Maintenance of roads e.g. potholes | 72% |
| Roadworks taking too long | 22% |
| Traffic congestion | 19% |
| Unsafe roads | 12% |
| Council does not response efficiently/refuses to solve enquiries | 8% |
| Noise/air pollution | 4% |
| Lack of drainage | 4% |
| More pedestrian crossings | 2% |
| Lack of cleanliness | 1% |
| Too many speed bumps | 1% |
| Unspecified | 2% |

| Maintenance of the local footpaths | N=53 |
|---|---|
| Uneven surface e.g. tree roots, cracked | 76% |
| Lack of maintenance/repairs taking too long | 35% |
| Footpaths are slippery | 10% |
| Safety | 8% |
| Improved planning of footpaths | 4% |
| Cleanliness | 3% |

Q9a. What particular aspects of 'PROVISION OF PARKING (INCLUDING RESTRICTIONS, RESIDENT PARKING, ETC) do you find unsatisfactory? (Resident)
Q9b. What particular aspects of 'MAINTENANCE OF THE LOCAL ROADS' do you find unsatisfactory? (Resident)
Q9c. What particular aspects of 'MAINTENANCE OF THE LOCAL FOOTPATHS' do you find unsatisfactory? (Resident)

# High Priority Areas for the Next 10 Years – Resident

| | N=401 | | N=401 |
|---|---|---|---|
| Managing overdevelopment | 27% | Provision of cycle paths | 5% |
| Traffic management/congestion | 25% | Road maintenance/infrastructure | 5% |
| Better services and facilities e.g. hospitals, schools, pools | 17% | Managing crime and resident safety | 4% |
| Preservation of green spaces/bushland | 17% | Maintaining community spirit | 3% |
| Environmental sustainability/ managing climate change | 15% | Managing cost of living | 3% |
| Diversity in development/more development | 12% | Pedestrian safety | 3% |
| Housing affordability/availability | 12% | Animal management | 2% |
| Improve council action e.g. rates, customer service, managing funds | 12% | Education | 2% |
| Managing population growth | 11% | Finishing/reduce development/road works | 2% |
| Public transport | 10% | Maintenance and safety of footpaths | 2% |
| Improved town planning | 9% | Managing pollution/noise control | 2% |
| Managing parking availability/less restricted parking | 9% | Maintain the local area/foreshore | 1% |
| Waste management/services | 8% | Managing the ageing population | 1% |
| Infrastructure for the growing population | 7% | Provision of amenities | 1% |
| Revitalise the CBD e.g. business & entertainment | 7% | Don't know | 3% |
| Retain village feel/heritage | 6% | | |

*Q10. Thinking about the next 10 years, what do you believe will be the highest priority issues within the North Sydney Council area?*

# Council's Used to Create the Group 3 Benchmark

| The Group 3 Benchmark was composed from the Council areas listed below: | |
|---|---|
| Bayside | Liverpool |
| Blacktown | Northern Beaches |
| Canada Bay | Parramatta |
| Canterbury-Bankstown | Randwick |
| Cumberland | Ryde |
| Fairfield | Sutherland |
| Georges River | Waverley |
| Inner West | Willoughby |
| Ku-ring-gai | |

**Appendix 2:**

## Additional Analyses (Business)

**Appendix 2**

# Type of Business

| N=202 | | | N=202 |
|---|---|---|---|
| Property and business services | 21% | Cultural and recreational | 5% |
| Health and community services | 19% | Manufacturing | 3% |
| Retail trade | 15% | Wholesale trade | 3% |
| Accommodation, cafes, and restaurants | 9% | Agriculture/Marine/Forestry | 1% |
| Finance and insurance | 8% | Diplomatic Consultation | <1% |
| Construction | 6% | Education | <1% |
| Personal and other services | 6% | Transport and storage | <1% |

*Q1a. What type of business do you operate? (Business)*

# Source of information – Business

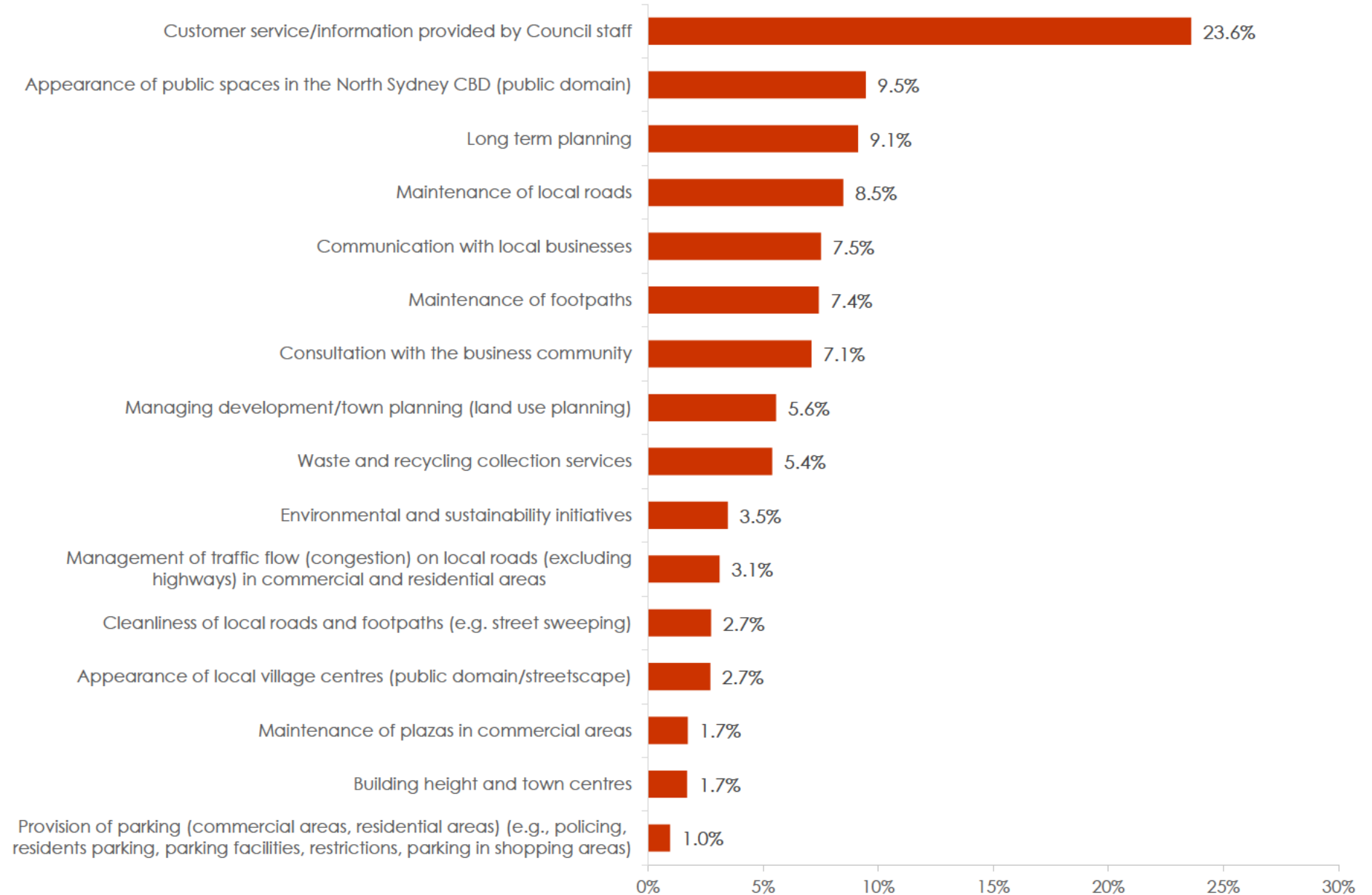| | Overall | Gender | | Ward | | Number of employees | | Business Type | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Male | Female | St Leonards | Cammeraygal | 0-5 | 6 or more | Property and business services | Health and community services | Retail trade | Accommodation, cafes, and restaurants | Finance and insurance | Other businesses |
| Email from Council | 50% | 51% | 50% | 59% | 45% | 46% | 57% | 37% | 61% | 53% | 63% | 35% | 53% |
| Brochures/leaflets | 11% | 11% | 11% | 14% | 9% | 13% | 9% | 16% | 11% | 3% | 5% | 12% | 15% |
| e-newsletters | 10% | 12% | 9% | 5% | 14% | 11% | 10% | 19% | 5% | 3% | 5% | 18% | 11% |
| Council newsletters | 7% | 7% | 7% | 5% | 8% | 9% | 4% | 5% | 13% | 10% | 5% | 0% | 5% |
| Council website | 5% | 5% | 5% | 4% | 6% | 6% | 4% | 9% | 8% | 0% | 5% | 6% | 2% |
| Weekly email newsletter | 4% | 4% | 5% | 5% | 4% | 4% | 5% | 5% | 0% | 7% | 0% | 12% | 5% |
| Local Newspaper | 2% | 2% | 2% | 1% | 3% | 2% | 1% | 2% | 0% | 7% | 0% | 0% | 2% |
| With rates notice | 1% | 0% | 3% | 0% | 3% | 0% | 4% | 0% | 3% | 0% | 0% | 12% | 0% |
| Word of mouth | 1% | 0% | 2% | 1% | 1% | 2% | 0% | 0% | 0% | 7% | 0% | 0% | 0% |
| Ad in a local paper | 1% | 1% | 1% | 0% | 2% | 1% | 1% | 2% | 0% | 3% | 0% | 0% | 0% |
| Via phone call to Council's customer service staff | <1% | 1% | 0% | 0% | 1% | 1% | 0% | 0% | 0% | 0% | 5% | 0% | 0% |
| Other | 5% | 6% | 4% | 6% | 5% | 6% | 5% | 5% | 0% | 7% | 11% | 6% | 7% |
| Base | 202 | 109 | 92 | 83 | 119 | 123 | 79 | 43 | 38 | 30 | 19 | 17 | 55 |

Base: N = 202

Q13a. What is your preferred source or method of receiving information relating to what North Sydney Council does? (Business)

A significantly higher/lower percentage by group

# Regression Analysis: Influence on Overall Satisfaction – Business

The chart to the right summarises the influence of the 16 facilities/ services on overall satisfaction with Council's performance, based on the Regression analysis.

| Facility/Service | Influence |
|---|---|
| Customer service/information provided by Council staff | 23.6% |
| Appearance of public spaces in the North Sydney CBD (public domain) | 9.5% |
| Long term planning | 9.1% |
| Maintenance of local roads | 8.5% |
| Communication with local businesses | 7.5% |
| Maintenance of footpaths | 7.4% |
| Consultation with the business community | 7.1% |
| Managing development/town planning (land use planning) | 5.6% |
| Waste and recycling collection services | 5.4% |
| Environmental and sustainability initiatives | 3.5% |
| Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas | 3.1% |
| Cleanliness of local roads and footpaths (e.g. street sweeping) | 2.7% |
| Appearance of local village centres (public domain/streetscape) | 2.7% |
| Maintenance of plazas in commercial areas | 1.7% |
| Building height and town centres | 1.7% |
| Provision of parking (commercial areas, residential areas) (e.g., policing, residents parking, parking facilities, restrictions, parking in shopping areas) | 1.0% |

# Reasons for Low Satisfaction – Business

| Provision of parking | N=88 |
|---|---|
| Limited parking availability general | 72% |
| Parking fees are too expensive/too many meters | 32% |
| Too many restricted parking areas with insufficient parking time | 23% |
| Roads/footpaths/cycle paths/road infrastructure limiting parking space | 7% |
| Lack of parking rule enforcement/policing | 6% |
| Limited parking permits | 6% |
| Council not making changes | 6% |
| Need more short-term parking areas | 5% |
| Parking causing traffic issues/unsafety | 5% |
| More parking options (in-building parking spot etc.) | 5% |
| Police/parking inspectors are too strict | 5% |
| Unfair parking regulation | 3% |
| Parking fines | 2% |
| Unspecified | 2% |
| Zoning issues | 1% |
| Business in causeway | 1% |
| Lack of disabled parking infrastructures | 1% |
| High parking levy for business buildings | 1% |

| Maintenance of the local roads | N=28 |
|---|---|
| Maintenance of roads e.g. potholes | 61% |
| Unsafe roads | 14% |
| Lack of drainage/Dodgy drains | 11% |
| Roadworks taking too long | 11% |
| Traffic congestion | 7% |
| Warringah freeway | 7% |
| Lack of cleanliness | 7% |
| Impact of illegal parking | 4% |
| Lack of enforcement/policing | 4% |
| No/Late notification of roadworks that impacts businesses | 4% |
| Reinstatement/Maintenance of road signs | 4% |
| Untimely roadwork | 4% |
| Environmental impacts | 4% |
| Better development (e.g. tunnel system) | 4% |
| Traffic and road impact caused by construction | 4% |
| Business impact by roadwork/construction | 4% |

| Maintenance of the local footpaths | N=26 |
|---|---|
| Uneven surface e.g. tree roots, cracked | 73% |
| Lack of maintenance/repairs taking too long | 42% |
| Safety | 31% |
| Cleanliness | 19% |
| Poor footpath condition that impacts businesses | 19% |
| Footpaths are slippery | 12% |
| Improved planning of footpaths | 8% |
| Requests could not be solved by Council promptly | 8% |
| Lack of greenery | 4% |
| Footpath blocking by constructions | 4% |
| Lack of information about repair programs | 4% |
| Other | 8% |

Q7a. What particular aspects of 'PROVISION OF PARKING (INCLUDING RESTRICTIONS, RESIDENT PARKING, ETC) do you find unsatisfactory? (Business)
Q7b. What particular aspects of 'MAINTENANCE OF THE LOCAL ROADS' do you find unsatisfactory? (Business)
Q7c. What particular aspects of 'MAINTENANCE OF THE LOCAL FOOTPATHS' do you find unsatisfactory? (Business)

# High Priority Areas for the Next 10 Years – Business

| | N=202 | | N=202 |
|---|---|---|---|
| Traffic management/congestion | 29% | Housing affordability/availability | 3% |
| Parking availability/affordability | 29% | Improve accessibility to businesses | 3% |
| More development planning | 15% | Connecting businesses to residents e.g. infrastructure and transportation | 2% |
| Preservation of green spaces/bushland/open spaces | 15% | Improved council action | 2% |
| More support for local businesses e.g. incentives, policies, consultations | 11% | More affordable rates | 2% |
| Managing overdevelopment | 10% | Provision of cycle paths | 2% |
| Environmental sustainability/ managing climate change | 9% | Animal control/management | 1% |
| Managing population growth | 8% | Diversity in development e.g. commercial, residential, low/high builds | 1% |
| Provision of public transport | 7% | Managing cost of living | 1% |
| Revitalise the CBD e.g. business & entertainment | 7% | Managing noise pollution | 1% |
| Road maintenance/improvement | 7% | More loading zones | 1% |
| Maintain the local area/foreshore | 6% | More street signage/visibility | 1% |
| Restrict building heights | 6% | Provision of amenities | 1% |
| Infrastructure for the growing population | 5% | Education | 0% |
| Maintenance and safety of pedestrians/footpaths | 5% | Homelessness control | 0% |
| More efficient respond/approval from Council/improved communication | 5% | Maintaining community spirit | 0% |
| Provision of services and facilities e.g. hospitals, schools, restaurants,  pools, | 5% | Pollution | 0% |
| Road works/construction intervention (e.g. taking so long) | 5% | Other | 2% |
| Waste management/services | 5% | Don't know | 8% |
| Retain village feel/heritage | 4% | | |
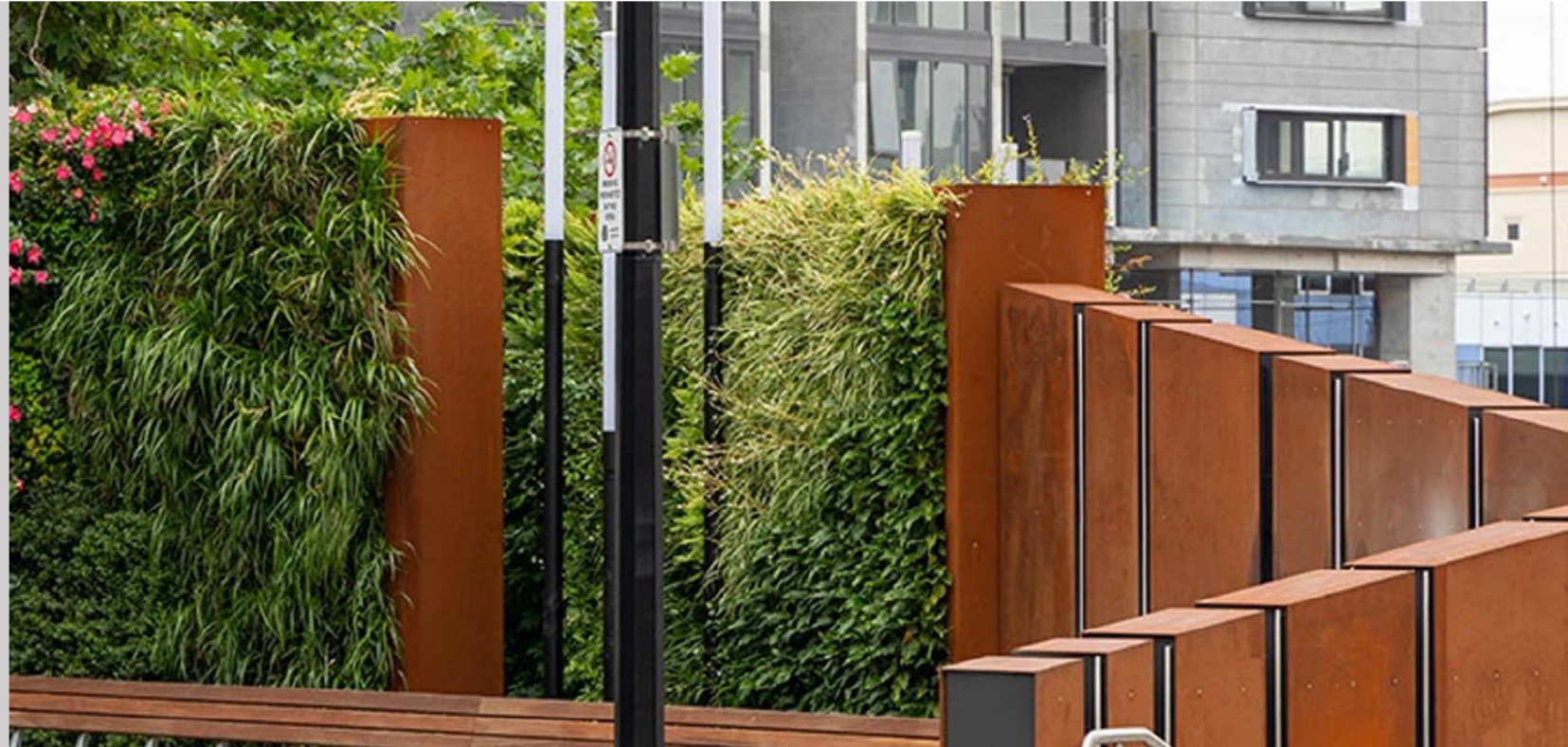
# Appendix 3

**Appendix 3:**

## Questionnaire

**North Sydney Council**
**Community Satisfaction**
**2023**

Good morning/afternoon/evening, my name is _____ and I'm calling on behalf of North Sydney Council from a company called Micromex. We are conducting a survey on a range of local issues – the survey will take about 15 minutes, would now be a good time to share your opinions?

**S1. Do you live in the North Sydney LGA? (SR)**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | |
| 2 | No | |

**Q2a. Do you own or do you rent your home? (SR)**

| Code | Answers | Notes |
|---|---|---|
| 1 | Owned/being paid off | |
| 2 | Rented | |
| 3 | Other (specify) | |
| 4 | Refused | Terminate |

**Q2b. Please specify: (TEXT)**

| Code | Answers | Notes |
|---|---|---|
| 1 | : | |

**Q3. Are you or an immediate family member a Councillor or permanent Council employee? (SR)**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | Terminate |
| 2 | No | |

**Q4. Overall, how would you rate your quality of life living in the North Sydney Council area on a scale from 1-6 where 1 is very poor and 6 is excellent? (SR)**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 - Very poor | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 | |
| 6 | 6 – Excellent | |

**Q5. How strongly do you agree or disagree that North Sydney as a whole has a strong sense of community? Please rate on a scale from 1-5, where 1 is strongly disagree and 5 is strongly agree?**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – Strongly disagree | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – Strongly agree | |

**Q6a. What do you value MOST about living in the North Sydney Council area?** *DO NOT PROMPT* **(SR)**

| Code | Answers | Notes |
|---|---|---|
| 1 | Affordable housing | |
| 2 | Attractive houses/streets/neighbourhood | |
| 3 | Close to airport | |
| 4 | Close to CBD/City | |
| 5 | Close to friends and/or family | |
| 6 | Close to jobs, universities | |
| 7 | Entertainment and dining options | |
| 8 | Friendly people/great community spirit | |
| 9 | New residential developments | |
| 10 | Open spaces/parks/trees etc | |
| 11 | Opportunities for my kids to live, learn or work locally | |
| 12 | Public transport | |
| 13 | Quiet/peaceful/safe | |
| 14 | Range/quality of shopping | |
| 15 | Rising home values | |
| 16 | Services/community facilities | |
| 17 | Other (specify) | |

**Q6b. Please specify: (TEXT)**

| Code | Answers | Notes |
|---|---|---|
| 1 | : | |

**Q7a. Thinking about all the services your Council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 5 where 1 is not at all satisfied and 5 is very satisfied. (*50% respondents will be asked this and Q17a*) (SR)**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – very satisfied | |

**Q7b. Thinking about all the services your council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 7 where 1 means not at all satisfied and 7 is very satisfied. (*50% respondents will be asked this and Q17b*) (SR)**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 – neither dissatisfied nor satisfied | |
| 5 | 5 | |
| 6 | 6 | |
| 7 | 7 – very satisfied | |

**Q8.** In this section, I will read out different Council services or facilities. For each one could you please rate your opinion of the importance of the service/facility to you, and your level of satisfaction with Council's performance/delivery of that service. The scale is from 1 to 5, where 1 is low importance and 5 is high importance and where 1 is low satisfaction and 5 is high satisfaction. *Prompt* RANDOMISE (SR)
*Note: Only ask satisfaction if 4 or 5 for importance*

### INFRASTRUCTURE & TRANSPORT

| Code | Answers | Importance<br>Low — High<br>1 - 2 - 3 - 4 - 5 | Satisfaction<br>Low — High<br>1 - 2 - 3 - 4 - 5 |
|---|---|---|---|
| 1 | Cleanliness of local roads and footpaths (e.g. street sweeping) | | |
| 2 | Maintenance of local roads | | |
| 3 | Maintenance of footpaths | | |
| 4 | Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas | | |
| 5 | Cycleways | | |
| 6 | Provision of parking (commercial areas, residential areas) e.g., policing, residents parking, parking facilities, restrictions, parking in shopping areas | | |
| 7 | Maintenance of plazas in commercial areas | | |
| 8 | Appearance of local village centres (public domain/streetscape) | | |
| 9 | Appearance of public spaces in the North Sydney CBD (public domain) | | |
| 10 | Wharves and boat ramps, dinghy/kayak storage etc | | |
| 11 | Bus shelters | | |

### OPEN SPACE & ENVIRONMENT

| Code | Answers | Importance<br>Low — High<br>1 - 2 - 3 - 4 - 5 | Satisfaction<br>Low — High<br>1 - 2 - 3 - 4 - 5 |
|---|---|---|---|
| 1 | Recreation facilities and amenities (e.g. sporting fields, North Sydney Indoor Sports Centre, MacCallum Pool) | | |
| 2 | Maintenance of parks, playgrounds, bushland areas, and recreation areas | | |
| 3 | Protecting bushland and enhancing canopy cover | | |
| 4 | Waste and recycling collection services | | |
| 5 | Environmental and sustainability initiatives | | |

### COMMUNITY & CULTURE

| Code | Answers | Importance<br>Low — High<br>1 - 2 - 3 - 4 - 5 | Satisfaction<br>Low — High<br>1 - 2 - 3 - 4 - 5 |
|---|---|---|---|
| 1 | Stanton Library | | |
| 2 | Community centres and halls | | |
| 3 | Council run community events (e.g. Twilight Food Fair, the Childrens Festival, North Sydney Art Prize) | | |
| 4 | Feeling safe in North Sydney - crime, road safety, pedestrians, cyclists, street lighting etc. | | |
| 5 | Range of arts and cultural experiences in North Sydney | | |

### DEVELOPMENT

| Code | Answers | Importance<br>Low — High<br>1 - 2 - 3 - 4 - 5 | Satisfaction<br>Low — High<br>1 - 2 - 3 - 4 - 5 |
|---|---|---|---|
| 1 | Managing development/town planning (land use planning) | | |
| 2 | Long term planning | | |
| 3 | Protection of low-rise residential area | | |
| 4 | Building height and town centres | | |

### LEADERSHIP & CUSTOMER SERVICE

| Code | Answers | Importance<br>Low — High<br>1 - 2 - 3 - 4 - 5 | Satisfaction<br>Low — High<br>1 - 2 - 3 - 4 - 5 |
|---|---|---|---|
| 1 | Customer service/information provided by Council staff | | |
| 2 | Consultation with the community | | |
| 3 | Communication with residents | | |

**Q9a.** What particular aspects of 'PROVISION OF PARKING (INCLUDING RESTRICTIONS, RESIDENT PARKING, ETC) do you find unsatisfactory? - If applicable, please indicate a specific location you find unsatisfactory.

| Code | Answers | Notes |
|---|---|---|
| 1 | : | SHOW Q9a. IF NOT AT ALL OR NOT VERY SATISFIED in Q8 |

**Q9b.** What particular aspects of 'MAINTENANCE OF THE LOCAL ROADS' do you find unsatisfactory? - If applicable, please indicate a specific location you find unsatisfactory.

| Code | Answers | Notes |
|---|---|---|
| 1 | : | SHOW Q9b. IF NOT AT ALL OR NOT VERY SATISFIED in Q8 |

**Q9c.** What particular aspects of 'MAINTENANCE OF THE LOCAL FOOTPATHS' do you find unsatisfactory? - If applicable, please indicate a specific location you find unsatisfactory.

| Code | Answers | Notes |
|---|---|---|
| 1 | : | SHOW Q9c. IF NOT AT ALL OR NOT VERY SATISFIED in Q8 |

**Q10. Thinking about the next 10 years, what do you believe will be the highest priority issues within the North Sydney Council area - remembering Council does not necessarily have to be responsible for these priorities.**

| Code | Answers | Notes |
|---|---|---|
| 1 | : | |

**Q11. Which of the following services have you used in the past 12 months?** *Prompt (MR)*

| Code | Answers | Notes |
|---|---|---|
| 1 | Recreation facilities - eg sporting fields, parks, playgrounds | |
| 2 | Stanton Library | |
| 3 | Community centres and halls | |
| 4 | Coal Loader (sustainability centre, café, Platform) | |
| 5 | None of the above | <exclusive/> |

**Q12. How satisfied are you with where North Sydney is heading in the future? Please rate your satisfaction from 1 to 5 where 1 is not at all satisfied and 5 is very satisfied.**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – very satisfied | |

**Q13. The North Sydney Council area is split into 23 'Precinct Committees' made up of residents, students, workers, and businesses who discuss matters affecting their local area. Prior to me telling you this, were you aware that you had a local Precinct Committee?**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | |
| 2 | No | |
| 3 | Unsure/Don't Know | |

**Q14a. Have you participated in any Council engagements in the past 12 months?**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | |
| 2 | No | Go to Q15a |
| 3 | Unsure/Don't Know | Go to Q15a |

**Q14b. (If yes) What engagements have you participated in? (eg. Giving feedback on YouSay website, workshops or Popup information stalls)**

| Code | Answers | Notes |
|---|---|---|
| 1 | : | |

**Q15a. Have you participated in any Council run events in the past 12 months?**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | |
| 2 | No | Go to Q16a |
| 3 | Unsure/Don't Know | Go to Q16a |

**Q15b. (If yes) What events have you participated in? (eg. Village Voice, NRTH SYD activations)**

| Code | Answers | Notes |
|---|---|---|
| 1 | : | |

**Q16a. What is your preferred source of information relating to what North Sydney Council does? Prompt (SR)**

| Code | Answers | Notes |
|---|---|---|
| 1 | Local Newspaper (Mosman Daily, North Shore Times, North Shore Living) | |
| 2 | Council newsletters (North Sydney News) | |
| 3 | Community notice boards | |
| 4 | Council website | |
| 5 | Brochures/leaflets | |
| 6 | e-newsletters | |
| 7 | Email from Council | |
| 8 | Council's social media | |
| 9 | With rates notice | |
| 10 | Weekly email newsletter | |
| 11 | Word of mouth | |
| 12 | Local radio | |
| 13 | Ad in a local paper | |
| 14 | Council meetings | |
| 15 | Community forums and information sessions | |
| 16 | Posters at Council facilities | |
| 17 | Via phone call to Council's Customer Service staff | |
| 18 | Other (specify) | |

**Q16b. Please specify: (TEXT)**

| Code | Answers | Notes |
|---|---|---|
| 1 | : | |

**Q17a. Thinking about all the services your Council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 7 where 1 means not at all satisfied and 7 is very satisfied. (*50% of respondents will be asked Q7a as well*)**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 – neither dissatisfied nor satisfied | |
| 5 | 5 | |
| 6 | 6 | |
| 7 | 7 – very satisfied | |

**Q17b. Thinking about all the services your Council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 5 where 1 is not at all satisfied and 5 is very satisfied. (*50% of respondents will be asked Q7b as well*)**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – very satisfied | |

**Q18. How strongly do you agree or disagree that Council operates under ethical, open, accountable, and transparent processes on a scale from 1-5 where 1 is strongly disagree and 5 is strongly agree?**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | 1 – Strongly disagree | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – Strongly agree | |

## Demographics

**D1. Which of the following best describes your household status?** *Prompt* (SR)

| Code | Answers | Notes |
|------|---------|-------|
| 1 | Living at home with parents | |
| 2 | Living alone | |
| 3 | Single parent with children | |
| 4 | Married/de facto with no children | |
| 5 | Married/de facto with children | |
| 6 | Group household | |
| 7 | Extended family household (multiple generations) | |

**D2. How long have you lived in the North Sydney LGA? (SR)**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | Under a year | |
| 2 | 1 to 3 years | |
| 3 | 4 to 6 years | |
| 4 | 7 to 10 years | |
| 5 | Over 10 years | |

**D3. And which of the following would you say is your main local shopping area?** *Prompt* (SR)

| Code | Answers | Notes |
|------|---------|-------|
| 1 | Cammeray | |
| 2 | Cremorne | |
| 3 | Crows Nest | |
| 4 | Kirribilli | |
| 5 | Neutral Bay | |
| 6 | North Sydney | |

**D4. And just to ensure we speak to a good cross section of people; can you please tell me which of the following age groups you fall into?** *Prompt* (SR)

| Code | Answers | Notes |
|------|---------|-------|
| 1 | 18-24 | |
| 2 | 25-34 | |
| 3 | 35-49 | |
| 4 | 50-59 | |
| 5 | 60-69 | |
| 6 | 70-84 | |
| 7 | 85+ | |

**D5. What is your gender? (SR)**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | Male | |
| 2 | Female | |
| 3 | Non-binary | |
| 4 | Prefer not to say | |

**D6. Which suburb do you live in?**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | Cammeray | |
| 2 | Cremorne | |
| 3 | Cremorne Point | |
| 4 | Crows Nest | |
| 5 | Kirribilli | |
| 6 | Kurraba Point | |
| 7 | Lavender Bay | |
| 8 | McMahons Point | |
| 9 | Milsons Point | |
| 10 | Neutral Bay | |
| 11 | North Sydney | |
| 12 | St Leonards | |
| 13 | Waverton | |
| 14 | Wollstonecraft | |

Thank you for your time and assistance. This market research is carried out in compliance with the Privacy Act, and the information you provided will be used only for research purposes. Just to remind you, I am calling from Micromex Research (1800 639 599) on behalf of North Sydney Council.

**North Sydney Council**
**Customer Satisfaction Business Survey**
**2023**

Good morning/afternoon/evening, my name is _____ and I'm calling on behalf of North Sydney Council from a company called Micromex. We are conducting a survey on a range of local issues – the survey will take about 15 minutes, would now be a good time to share your opinions?

**Q1. What type of business do you operate? (SR)**

| Code | Answers | Notes |
|---|---|---|
| 1 | Manufacturing | |
| 2 | Construction | |
| 3 | Wholesale trade | |
| 4 | Retail trade | |
| 5 | Accommodation, cafes and restaurants | |
| 6 | Transport and storage | |
| 7 | Finance and insurance | |
| 8 | Property and business services | |
| 9 | Education | |
| 10 | Health and community services | |
| 11 | Cultural and recreational | |
| 12 | Personal and other services | |
| 13 | Other | |

**Q2. Does the company operate within the North Sydney Council area?**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | |
| 2 | No | Terminate |

**Q3. How satisfied are you with North Sydney as a place to do business on a scale of 1-5, where 1 is not at all satisfied and 5 is very satisfied?**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – Not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – Very satisfied | |

**Q4. Are you satisfied with North Sydney's strategic direction? i.e., the way Council balances the environmental, social, economic, and civic leadership objectives of the community it serves.**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | |
| 2 | No | |
| 3 | Unsure/Don't know | |

**Q5a. Thinking about all the services your Council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 5 where 1 is not at all satisfied 5 is very satisfied. (50% respondents will be asked this and Q15b)**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – Not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – Very satisfied | |

**Q5b. Thinking about all the services your council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 7 where 1 means not at all satisfied 7 is very satisfied. (50% respondents will be asked this and Q15a)**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – Not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 – Neither dissatisfied nor satisfied | |
| 5 | 5 | |
| 6 | 6 | |
| 7 | 7 – Very satisfied | |

**Q6. In this section I will read out different Council services or facilities. For each one could you please rate your opinion of the importance of the service/facility to you, and your level of satisfaction with Council's performance/delivery of that service. The scale is from 1 to 5, where 1 is low importance and 5 is high importance and where 1 is low satisfaction and 5 is high satisfaction.** *Prompt RANDOMISE*

*Note: Only ask satisfaction if 4 or 5 for importance*

**INFRASTRUCTURE & TRANSPORT**

| Code | Answers | Importance Low 1 - 2 - 3 - 4 - 5 High | Satisfaction Low 1 - 2 - 3 - 4 - 5 High |
|---|---|---|---|
| 1 | Cleanliness of local roads and footpaths (e.g. street sweeping) | | |
| 2 | Maintenance of local roads | | |
| 3 | Maintenance of footpaths | | |
| 4 | Management of traffic flow (congestion) on local roads (excluding highways) in commercial and residential areas | | |
| 5 | Provision of parking (commercial areas, residential areas e.g., policing, residents parking, parking facilities, restrictions, parking in shopping areas) | | |
| 6 | Maintenance of plazas in commercial areas | | |
| 7 | Appearance of local village centres (public domain/streetscape) | | |
| 8 | Appearance of public spaces in the North Sydney CBD (public domain) | | |

## OPEN SPACE & ENVIRONMENT

| Code | Answers | Importance<br>Low        High<br>1 - 2 - 3 - 4 - 5 | Satisfaction<br>Low        High<br>1 - 2 - 3 - 4 - 5 |
|---|---|---|---|
| 1 | Waste and recycling collection services | | |
| 2 | Environmental and sustainability initiatives | | |

## DEVELOPMENT

| Code | Answers | Importance<br>Low        High<br>1 - 2 - 3 - 4 - 5 | Satisfaction<br>Low        High<br>1 - 2 - 3 - 4 - 5 |
|---|---|---|---|
| 1 | Managing development/town planning (land use planning) | | |
| 2 | Long term planning | | |
| 3 | Building height and town centres | | |

## LEADERSHIP & CUSTOMER SERVICE

| Code | Answers | Importance<br>Low        High<br>1 - 2 - 3 - 4 - 5 | Satisfaction<br>Low        High<br>1 - 2 - 3 - 4 - 5 |
|---|---|---|---|
| 1 | Customer service/information provided by Council staff | | |
| 2 | Consultation with the business community | | |
| 3 | Communication with local businesses | | |

**Q7a. (IF NOT AT ALL OR NOT VERY SATISFIED in Q6), What particular aspects of OVERALL PROVISION OF PARKING (INCLUDING RESTRICTIONS, RESIDENT PARKING, ETC) do you find unsatisfactory? - If applicable, please indicate a specific location you find unsatisfactory.**

| Code | Answers | Notes |
|---|---|---|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |

**Q7b. (IF NOT AT ALL OR NOT VERY SATISFIED in Q6), What particular aspects of MAINTENANCE OF THE LOCAL ROADS do you find unsatisfactory? - If applicable, please indicate a specific location you find unsatisfactory.**

| Code | Answers | Notes |
|---|---|---|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |

**Q7c. (IF NOT AT ALL OR NOT VERY SATISFIED in Q6), What particular aspects of MAINTENANCE OF THE LOCAL FOOTPATHS do you find unsatisfactory? - If applicable, please indicate a specific location you find unsatisfactory.**

| Code | Answers | Notes |
|---|---|---|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |

**Q8a. Have you conducted business with North Sydney Council in the last 12 month?**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | |
| 2 | No | Go to Q9 |

**Q8b. Please rate your level of satisfaction with how easy it was to conduct the business on a scale of 1-5, where 1 is not at all satisfied and 5 is very satisfied.**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – Not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – Very satisfied | |

**Q9. Would you say you agree or disagree that Council operates under ethical, open, accountable and transparent processes on a scale of 1-5, where 1 is strongly disagree and 5 is strongly agree?**

| Code | Answers | Notes |
|---|---|---|
| 1 | 1 – Strongly disagree | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – Strongly agree | |

**Q10. Is your business part of a Chamber of Business or Association?**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | |
| 2 | No | |
| 3 | Unsure/Don't know | |

**Q11. North Sydney Council has 'Streetscape Committees' for the Cremorne, Crows Nest, Kirribilli and Neutral Bay shopping areas, made up of residents and businesses who provide two-way feedback to Council about their local shopping area. Prior to me telling you this, were you aware that you had a local Streetscape Committee?**

| Code | Answers | Notes |
|---|---|---|
| 1 | Yes | |
| 2 | No | |
| 3 | Unsure/Don't know | |

**Q12. The North Sydney Council area is split into 23 'Precinct Committees' made up of residents, students, workers, and businesses who discuss matters affecting their local area. Prior to me telling you this, were you aware that you had a local Precinct Committee?**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | Yes | |
| 2 | No | |
| 3 | Unsure/Don't know | |

**Q13. What is your preferred source OR method of receiving information relating to what North Sydney Council does?** *Prompt* **(SR)**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | Local Newspaper (Mosman Daily, North Shore Times, North Shore Living) | |
| 2 | Council newsletters (North Sydney News) | |
| 3 | Community notice boards | |
| 4 | Council website | |
| 5 | Brochures/leaflets | |
| 6 | e-newsletters | |
| 7 | Email from Council | |
| 8 | Council's social media | |
| 9 | With rates notice | |
| 10 | Weekly email newsletter | |
| 11 | Word of mouth | |
| 12 | Local radio | |
| 13 | Ad in a local paper | |
| 14 | Council meetings | |
| 15 | Community forums and information sessions | |
| 16 | Posters at Council facilities | |
| 17 | Via phone call to Council's Customer Service staff | |
| 18 | Other (please specify) | |

**Q14. Thinking about the next 10 years, what do you believe will be the highest priority issues within the North Sydney Council area – Remembering Council does not necessarily have to be responsible for these priorities.**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | | |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |

**Q15a. Thinking about all the services your Council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 5 where 1 is not at all satisfied 5 is very satisfied. (50% respondents will be asked this and Q5b)**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | 1 – Not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 | |
| 5 | 5 – Very satisfied | |

**Q15b. Thinking about all the services your council provides, overall, how satisfied have you been with your Council over the last 12 months? Please rate your satisfaction with the service from 1 to 7 where 1 means not at all satisfied 7 is very satisfied. (50% respondents will be asked this and Q5a)**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | 1 – Not at all satisfied | |
| 2 | 2 | |
| 3 | 3 | |
| 4 | 4 – Neither dissatisfied nor satisfied | |
| 5 | 5 | |
| 6 | 6 | |
| 7 | 7 – Very satisfied | |

**D1. How many employees do you have in your business, by employees I mean full time equivalents other than the proprietor? DO NOT PROMPT**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | No employees/sole trader | |
| 2 | 1-5 employees | |
| 3 | 6-10 | |
| 4 | 11-20 | |
| 5 | More than 20 | |

**D2a. And which of the following would you say best approximates the location of your business? Prompt**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | Cammeray | |
| 2 | Cremorne | |
| 3 | Cremorne Point | |
| 4 | Crows Nest | |
| 5 | Kirribilli | |
| 6 | Kurraba Point | |
| 7 | Lavender Bay | |
| 8 | McMahons Point | |
| 9 | Milsons Point | |
| 10 | Neutral Bay | |
| 11 | North Sydney | |
| 12 | St Leonards | |
| 13 | Waverton | |
| 14 | Wollstonecraft | |
| 15 | Other (specify) | |

**D2b. Other (please specify)**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | | |

**D3. What is your gender?**

| Code | Answers | Notes |
|------|---------|-------|
| 1 | Male | |
| 2 | Female | |
| 3 | Non-binary | |
| 4 | Prefer not to say | |

Thank you for your time and assistance. This market research is carried out in compliance with the Privacy Act, and the information you provided will be used only for research purposes. Just to remind you, I am calling from Micromex Research (1800 639 599) on behalf of North Sydney Council.

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research

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