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

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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+)

■ 18-34　■ 35-49　■ 50-59　■ 60+

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%

Ratepayer status

Ratepayer 63%　　Non-ratepayer 34%

Other 3%

Time lived in the area

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

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

Legend:
- No employees/sole trader
- 1-5 employees
- 6-10 employees
- 11-20 employees
- 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%
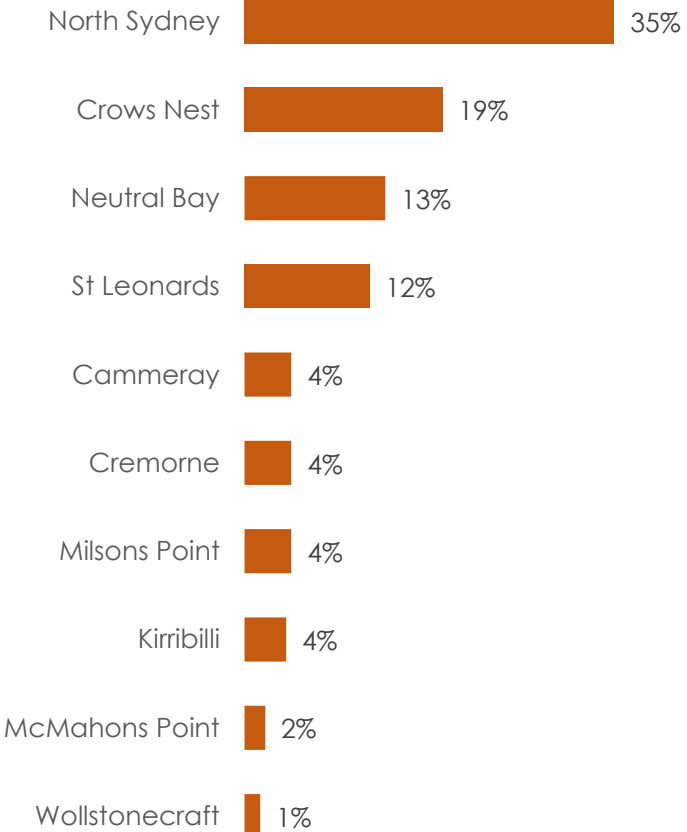
Summary Findings

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

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

Key Areas of Focus

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

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:

Living in North Sydney

Section 1a
(Resident)

micromex research

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.
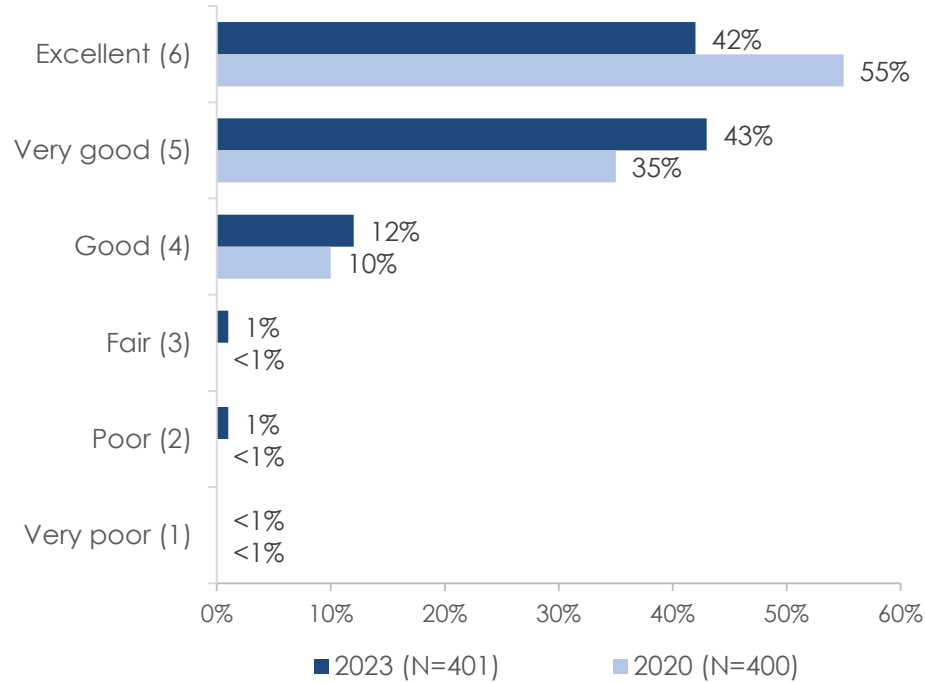
	Excellent (6)	42% / 55%
	Very good (5)	43% / 35%
	Good (4)	12% / 10%
	Fair (3)	1% / <1%
	Poor (2)	1% / <1%
	Very poor (1)	<1% / <1%

■ 2023 (N=401)   ■ 2020 (N=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

Year on Year Trend

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

	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.

Horizontal bar chart:

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
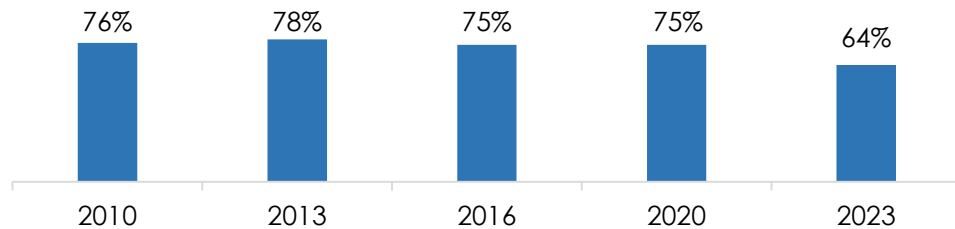
2010	2013	2016	2020	2023
76%	78%	75%	75%	64%

	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 15

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

10% Public transport

Most Valued Aspects

8% Convenience (general)

7% Quiet / peaceful / safe

7% Services / community facilities

Bar chart

Aspect	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)

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.
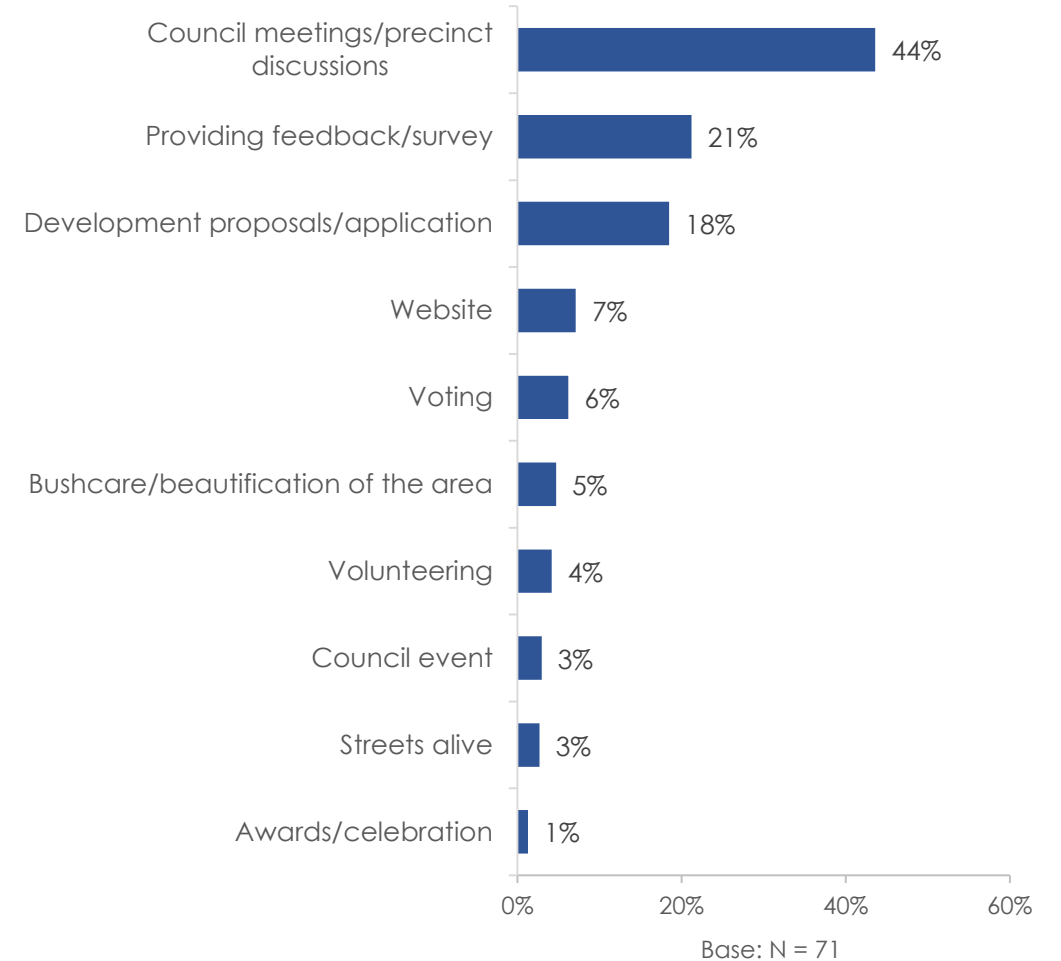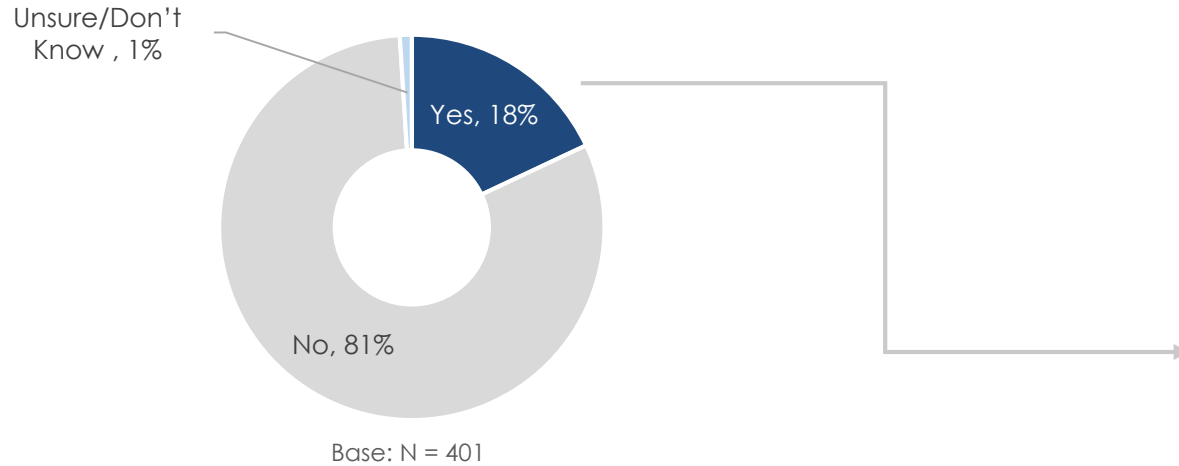
Unsure/Don't Know , 1%
Yes, 18%
No, 81%

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.
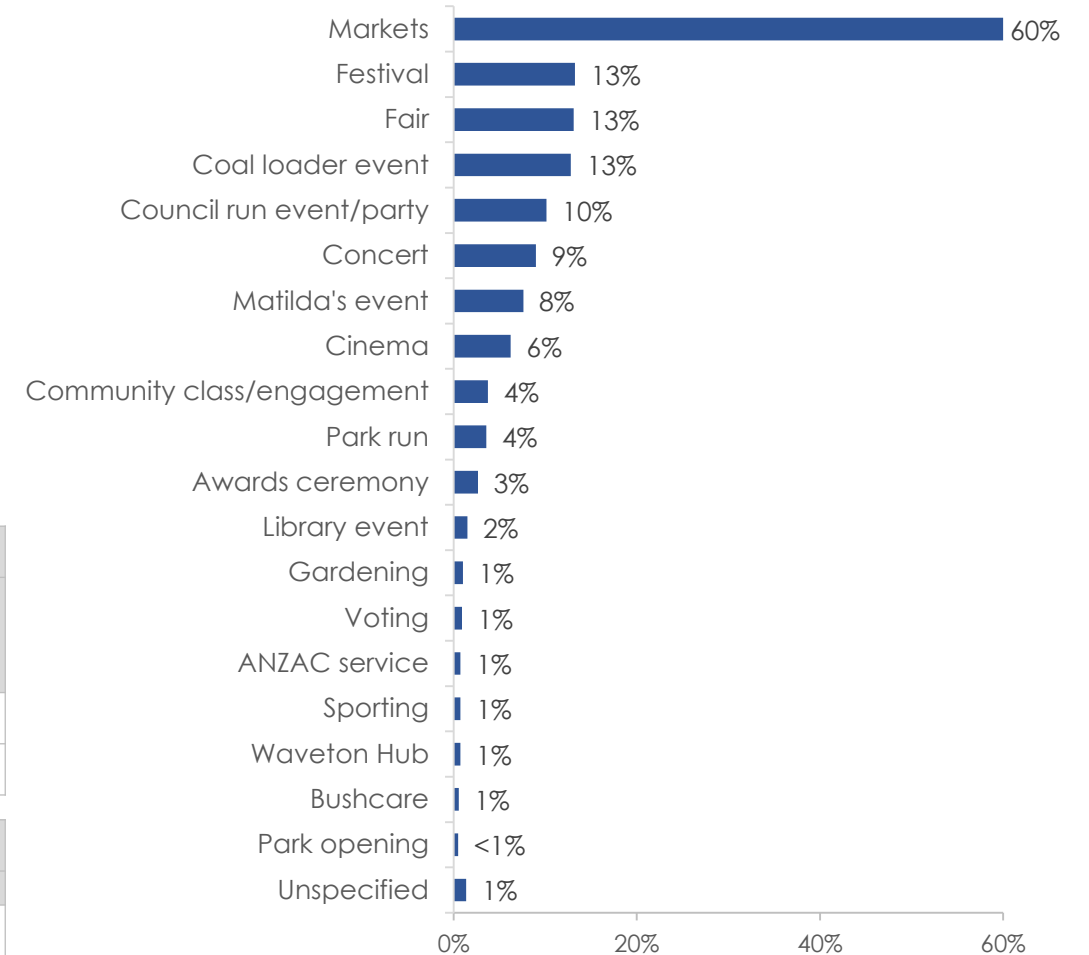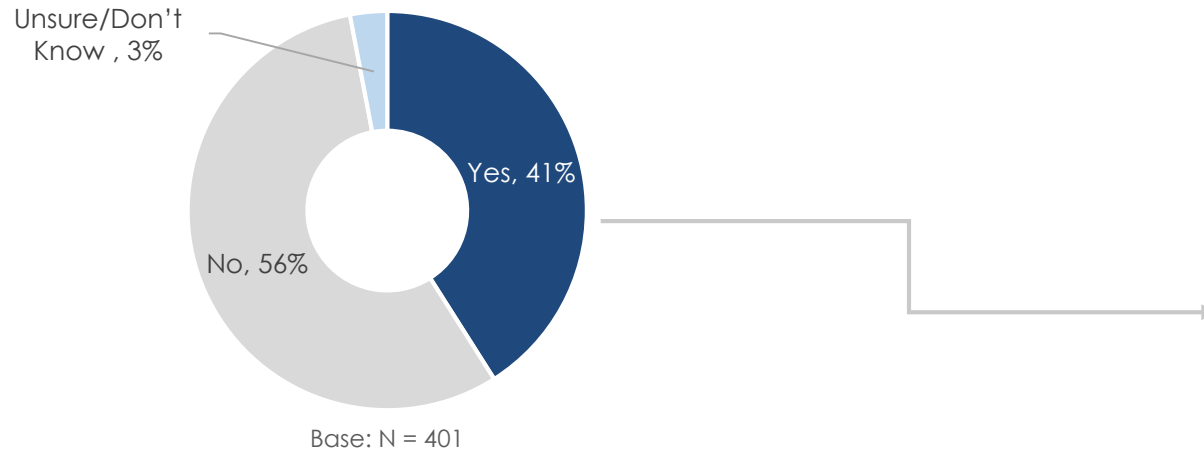
Unsure/Don't Know , 3%

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

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   18

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*.

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%

■ 2023 (N=401)   ■ 2020 (N=400)

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%

*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.
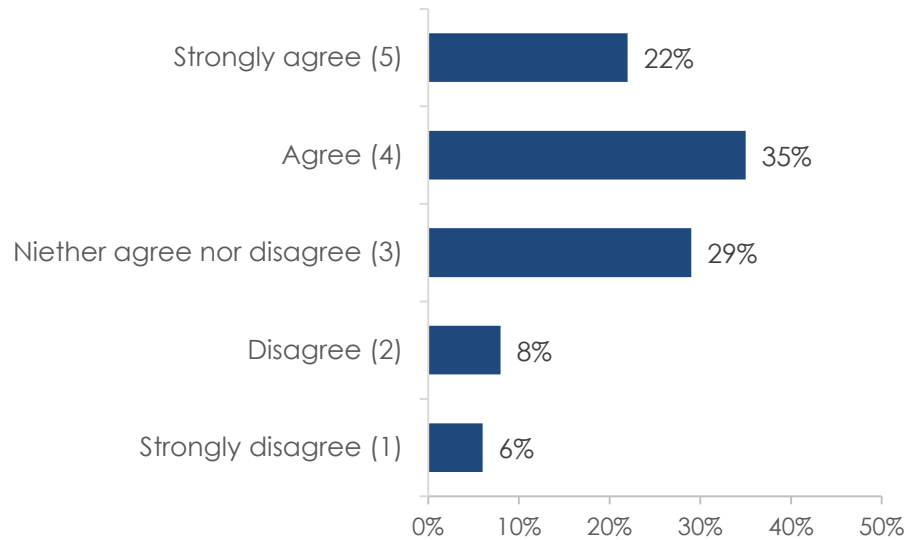
Year on Year Trend

	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

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.
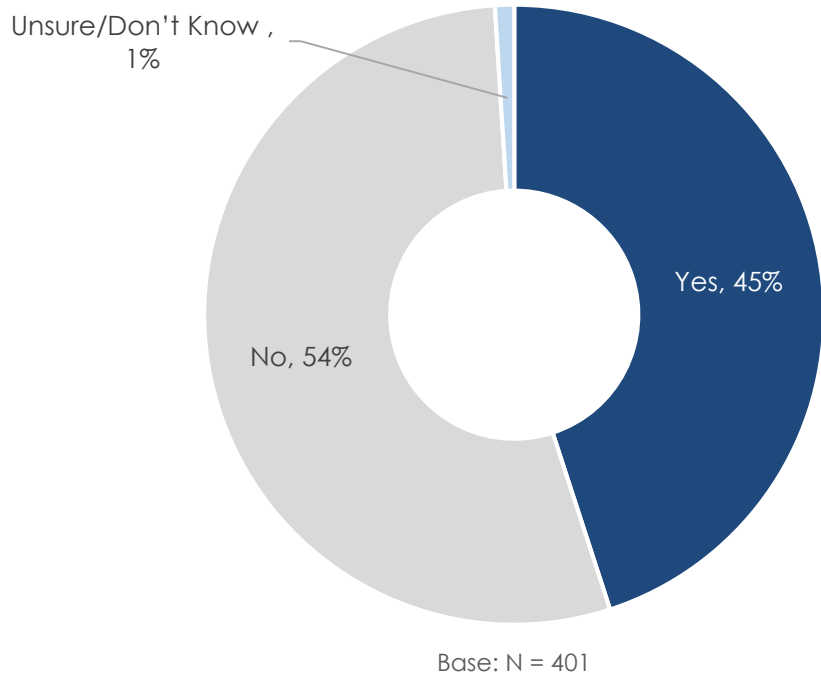
Year on Year Trend
Awareness of Precinct Committees
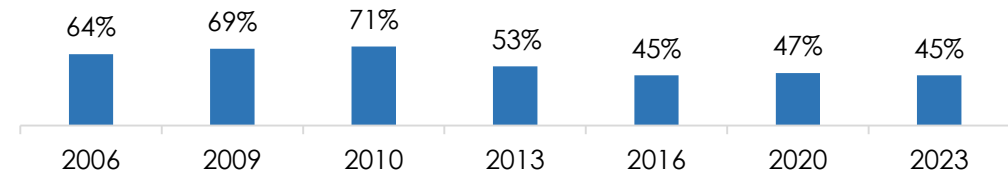
2006	2009	2010	2013	2016	2020	2023
64%	69%	71%	53%	45%	47%	45%

Unsure/Don't Know , 1%

No, 54%

Yes, 45%

Base: N = 401

	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

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

Section 1b:

Summary of Council Services/Facilities

Section 2b (Resident)

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
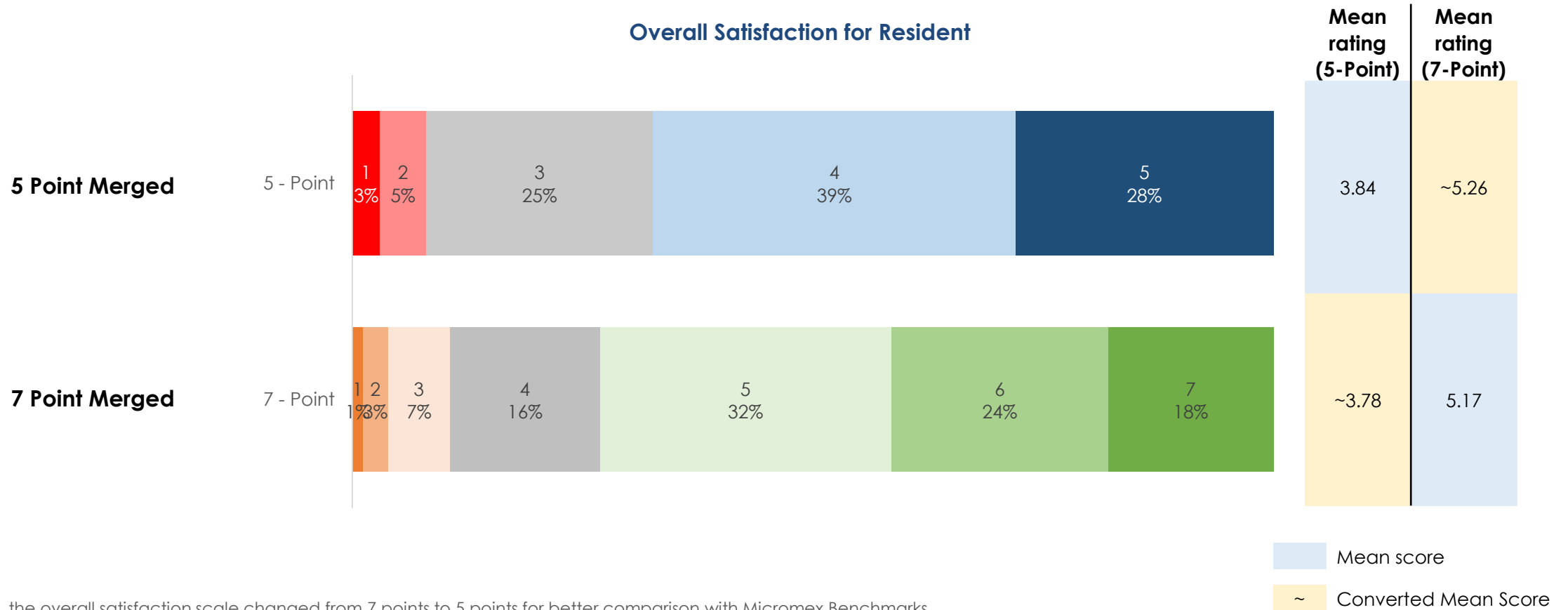
Note: In 2023, the overall satisfaction scale changed from 7 points to 5 points for better comparison with Micromex Benchmarks.

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.

Bar chart:
- 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

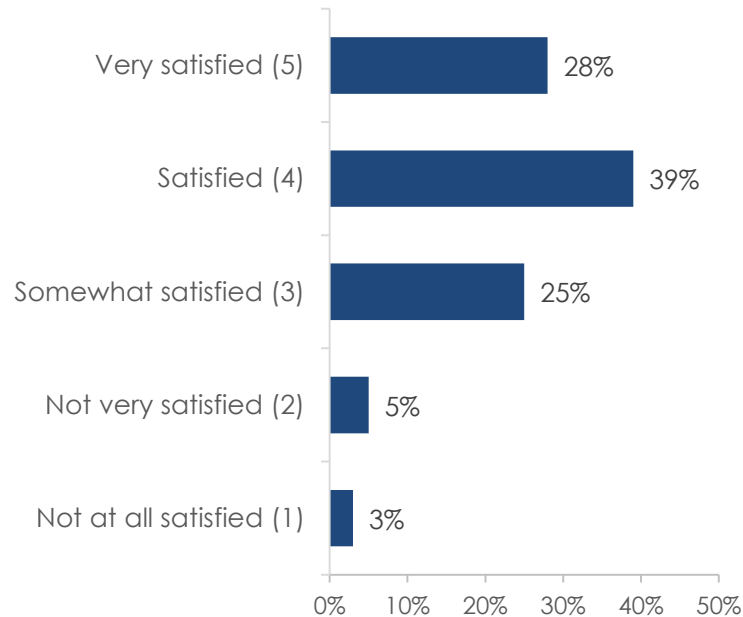|	Overall	Gender		Ward		Ratepayer Status	
		Male	Female	St Leonards	Cammeraygal	Ratepayer	Non-ratepayer/ Other
Top 3 Box %	92%	92%	92%	94%	90%	88%	98%
Mean rating	3.84	3.87	3.82	3.92	3.75	3.68	4.11
Base	401	186	215	203	197	251	149

	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

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:
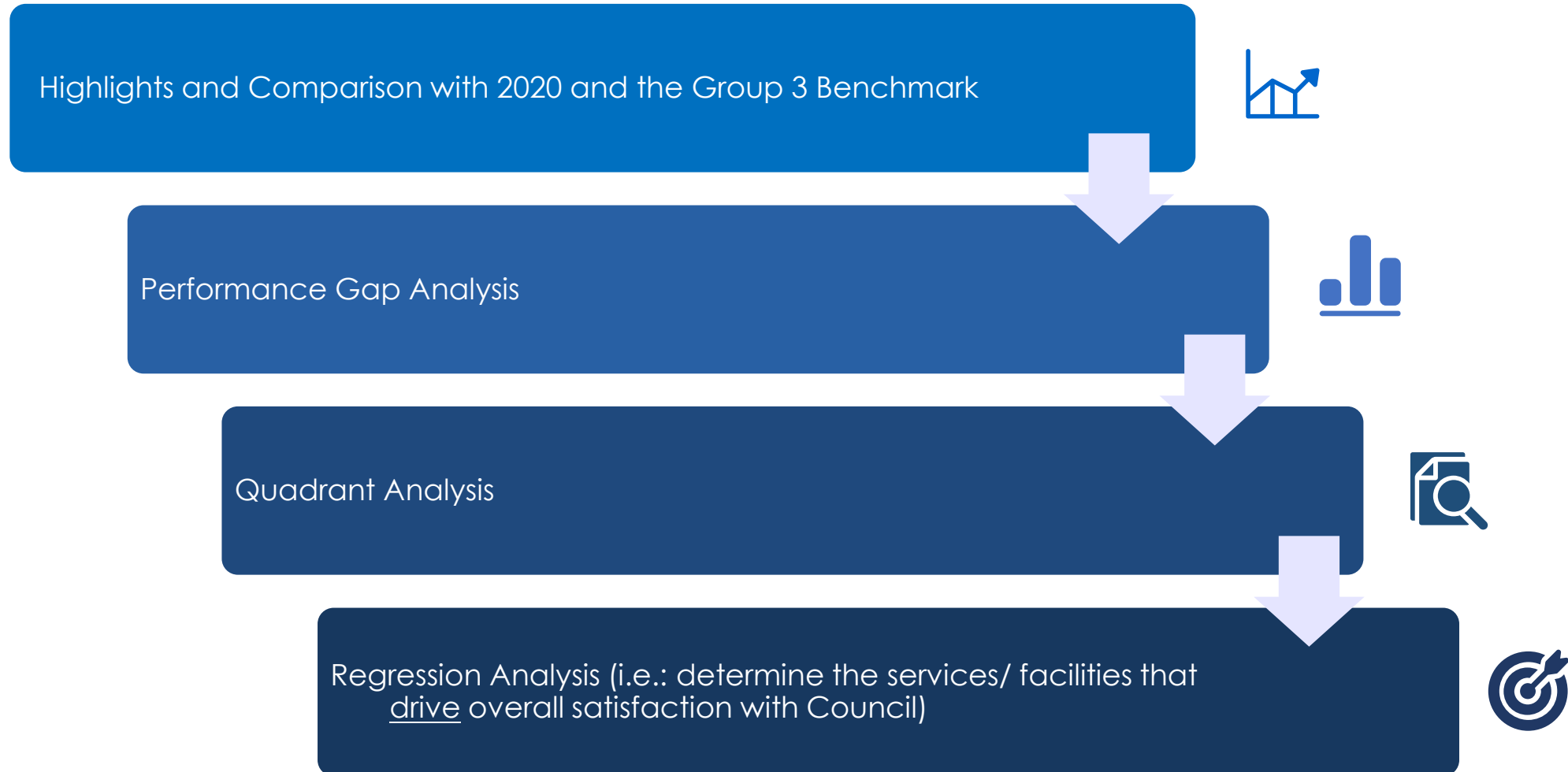
Highlights and Comparison with 2020 and the Group 3 Benchmark

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

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

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.

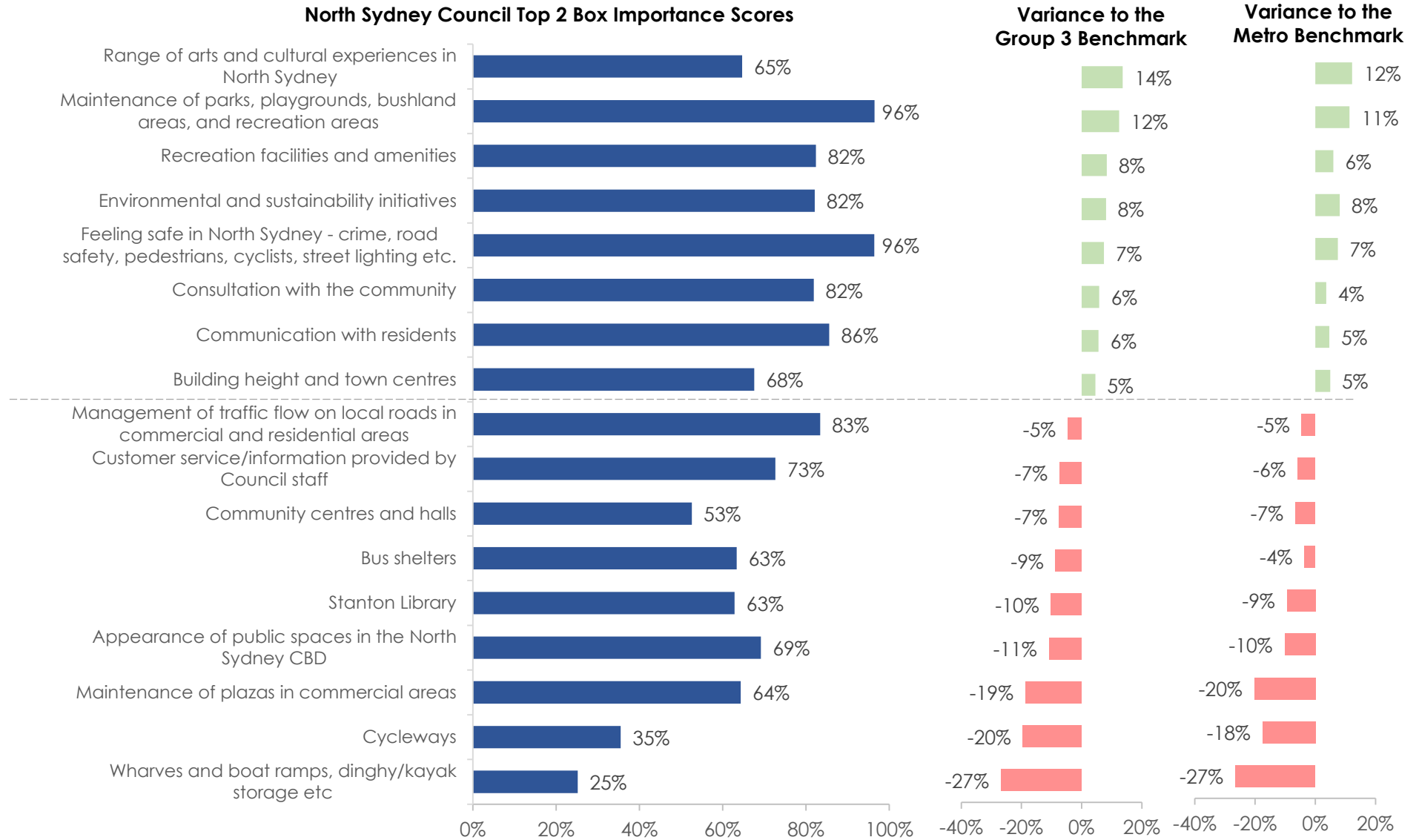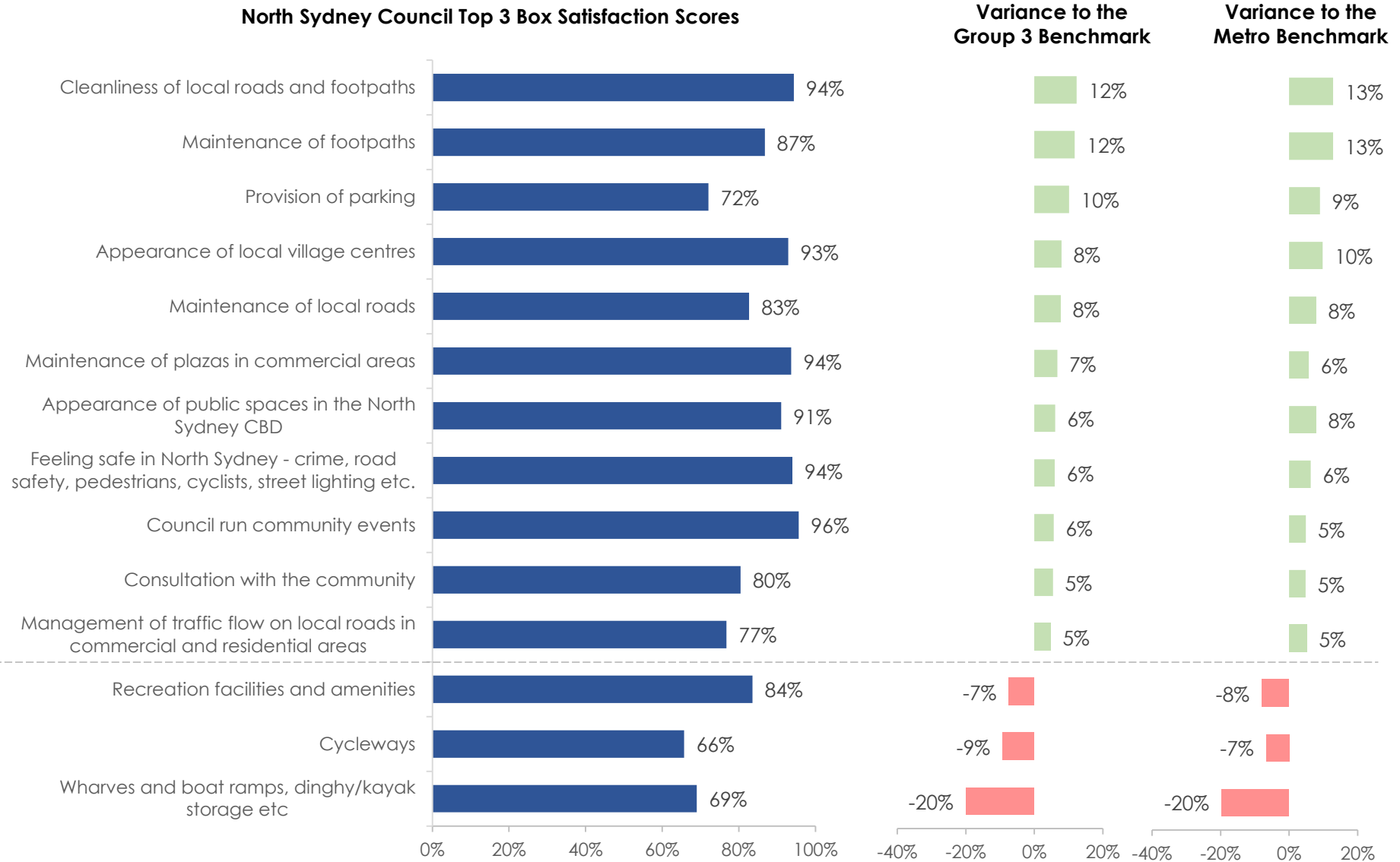Council commissioned bespoke benchmarking against OLG Group 3 councils - to compare against metropolitan councils of similar size.

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

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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	Score	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
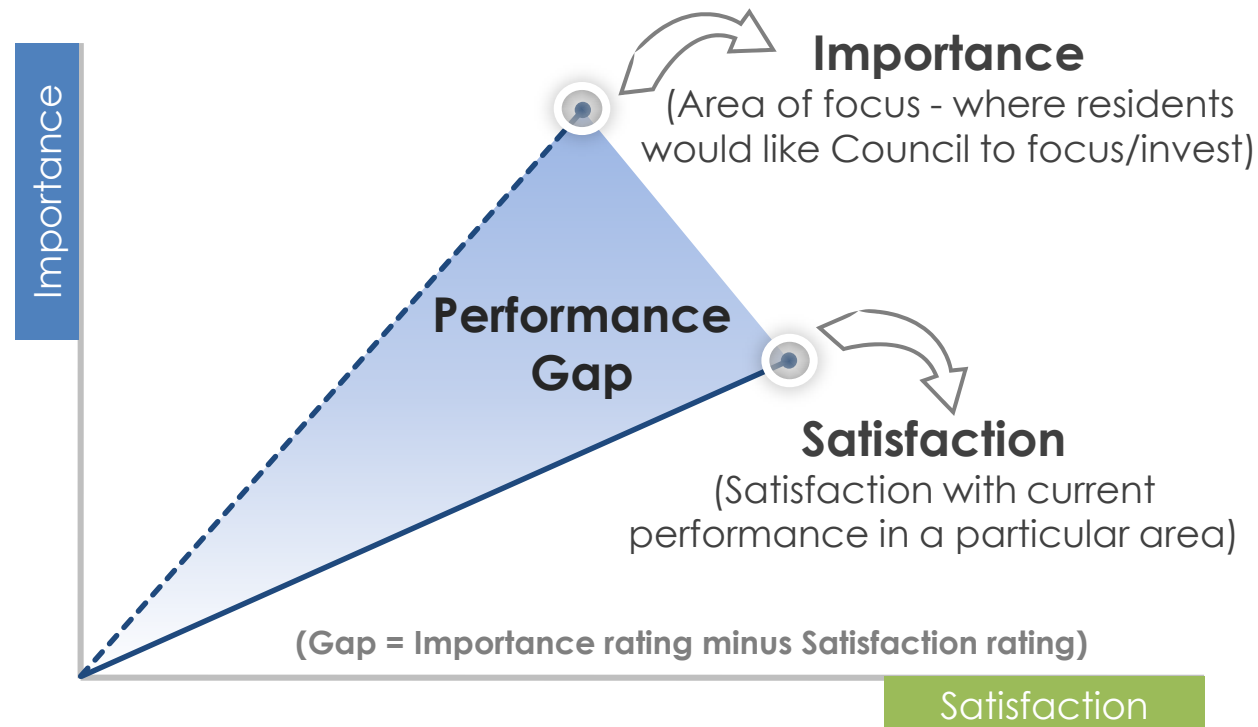Top 3 box = at least somewhat satisfied

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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)

Importance

Satisfaction

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.
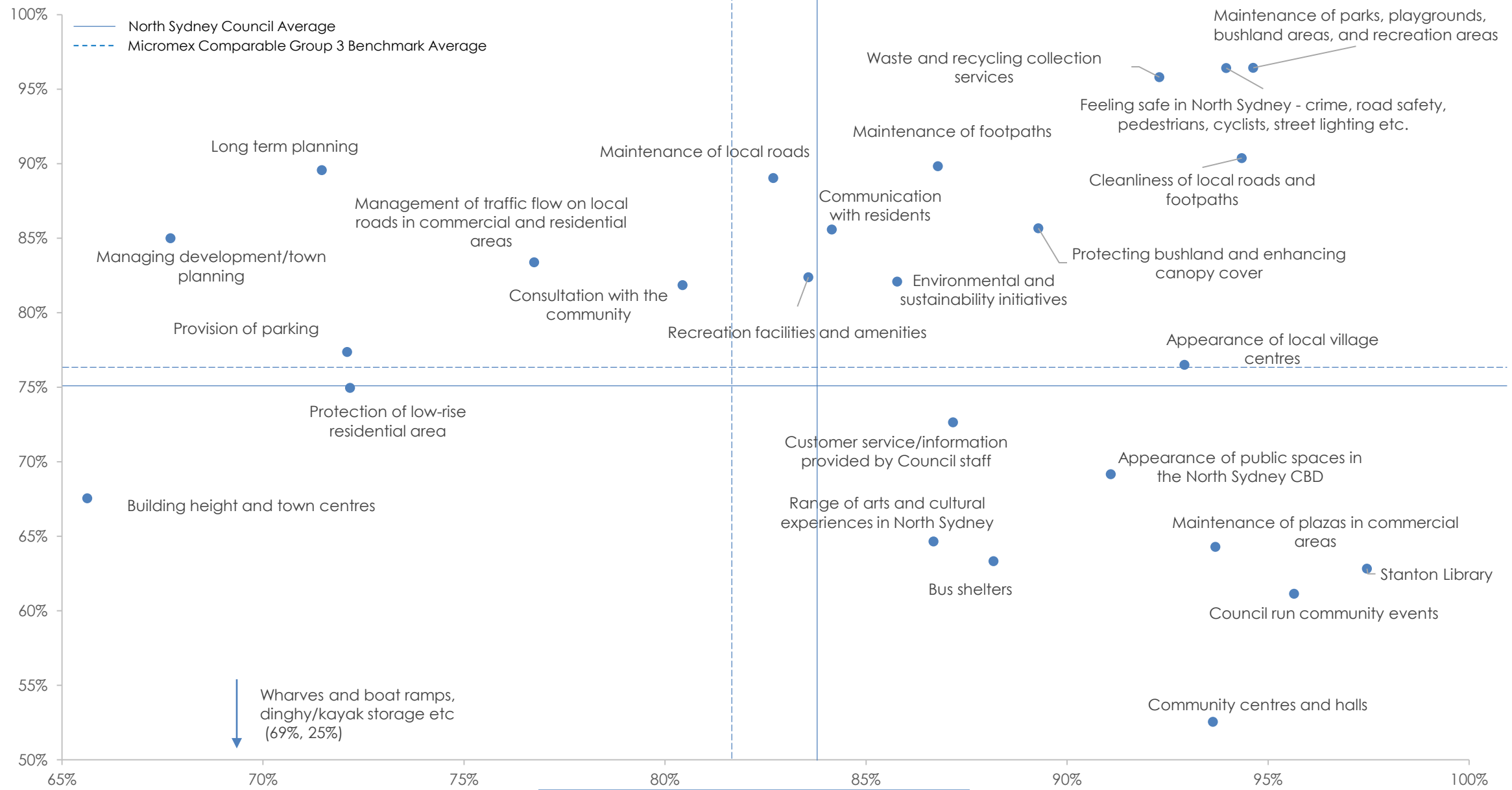
Resident

Improve
Higher importance, lower satisfaction

Maintain
Higher importance, higher satisfaction

— 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 footpaths

Maintenance of local roads

Cleanliness of local roads and footpaths

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

Communication with residents

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

Importance

Satisfaction

Niche
Lower importance, lower satisfaction

Social Capital
Lower importance, higher satisfaction

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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.
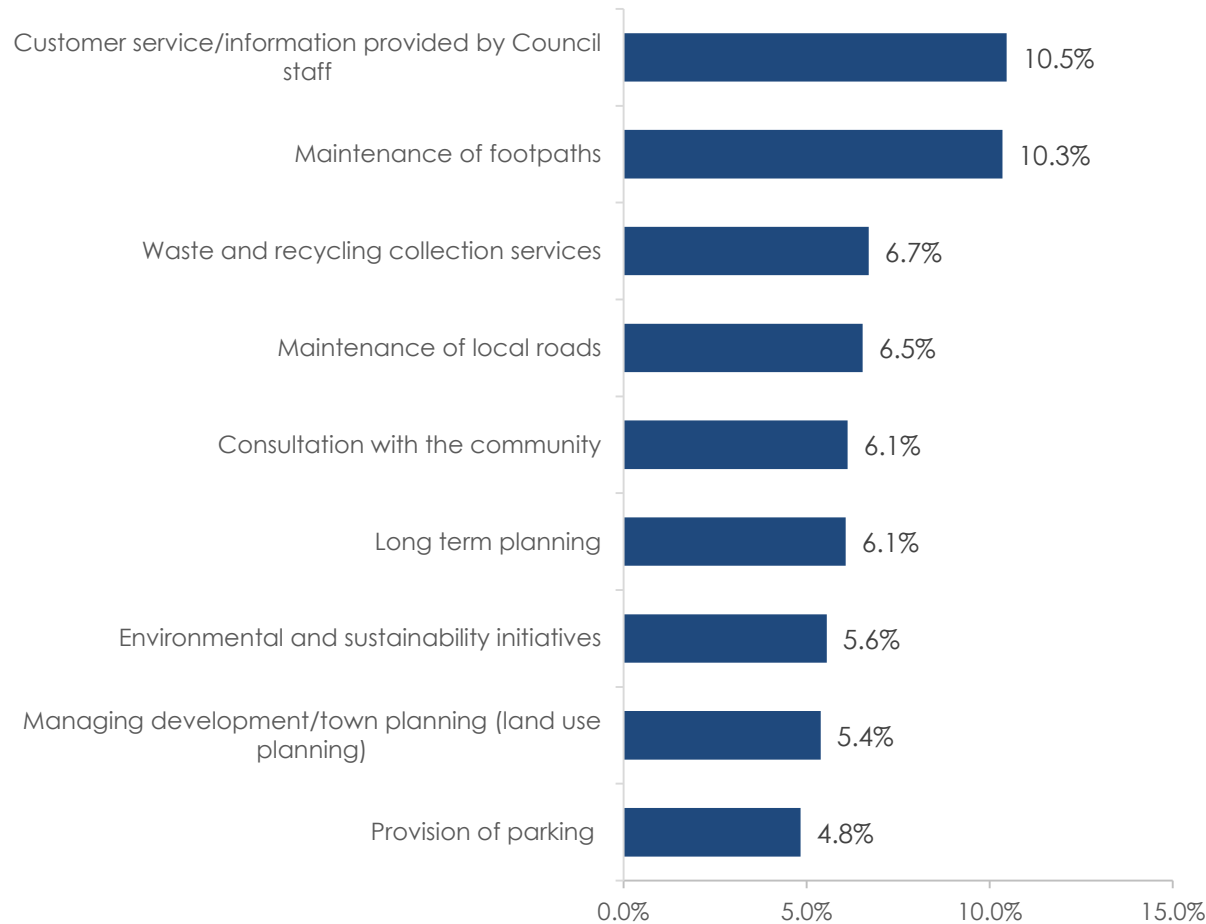
What Does This Mean?

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

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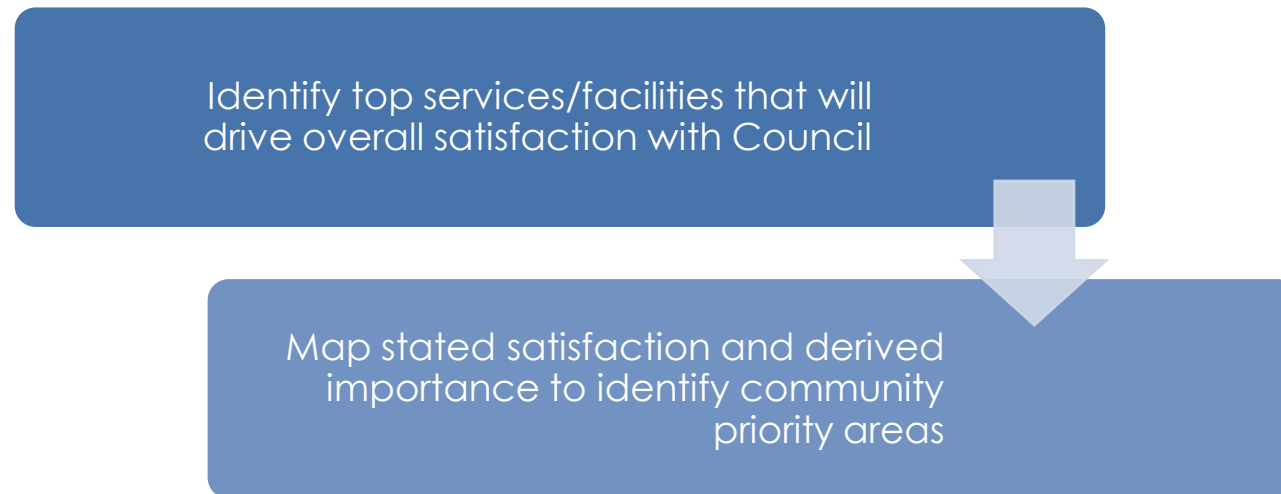
Key Drivers of Overall Satisfaction with Council – Resident

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.

Driver	Percentage
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)*

Note: Please see Appendix 1 for complete list

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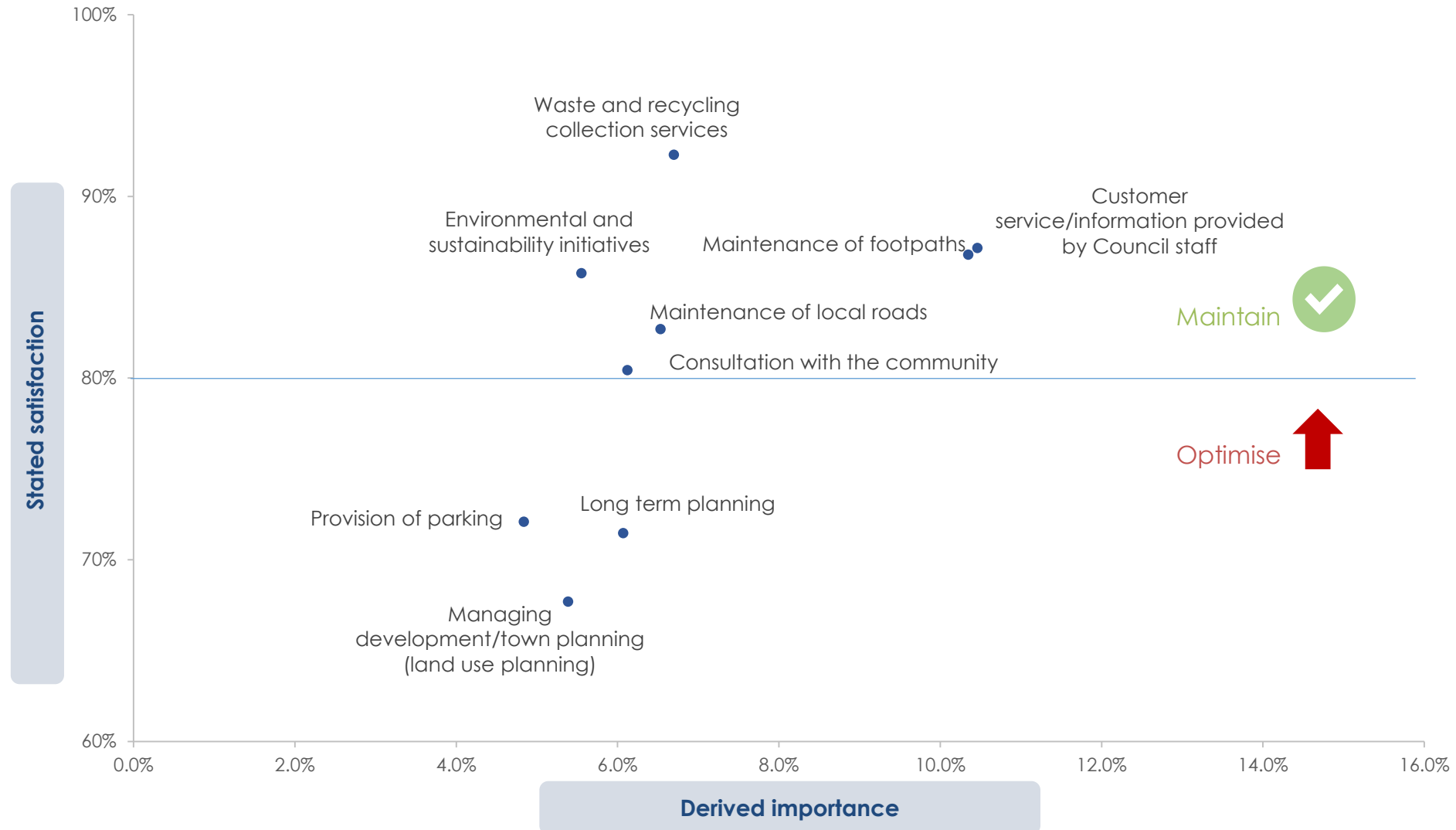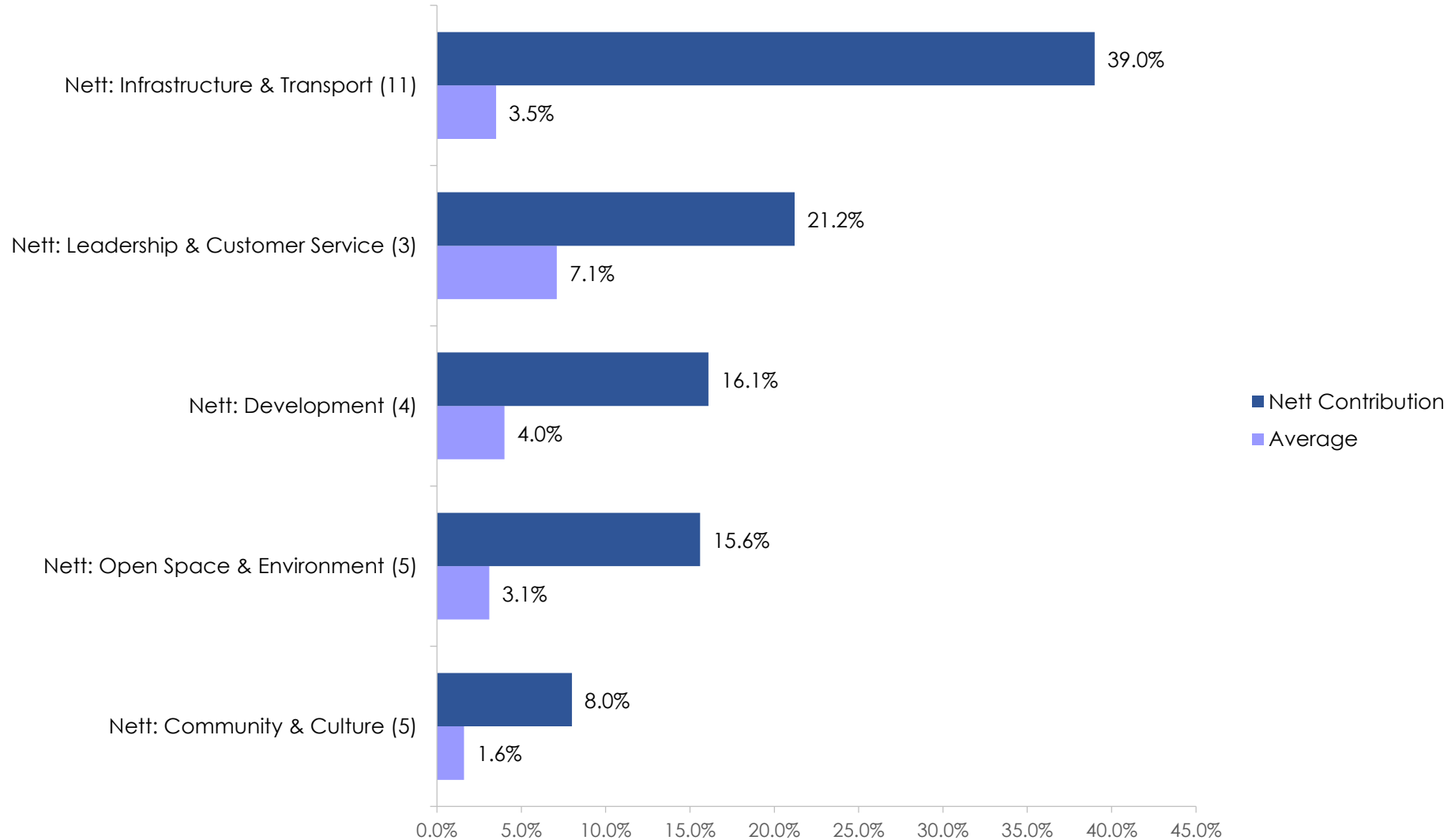
By combining the outcomes of the regression data, we can identify the derived importance of the different Nett Priority Areas.

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

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%

Usage of Services

Residents primarily used recreation facilities in the last 12 months, younger residents are less likely to have used services.
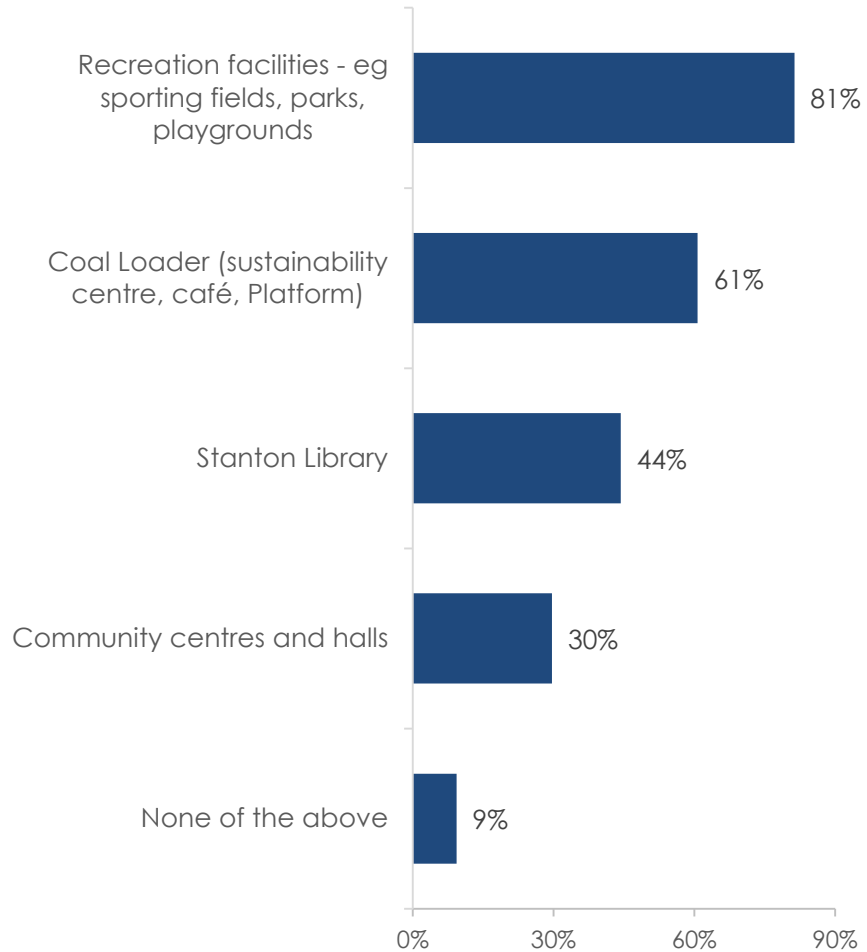
	Overall	Gender		Ward		Ratepayer Status	
		Male	Female	St Leonards	Cammeraygal	Ratepayer	Non-ratepayer /Other
Recreation facilities	81%	84%	79%	78%	85%	83%	79%
Coal Loader	61%	56%	64%	57%	64%	65%	54%
Stanton Library	44%	37%	51%	41%	47%	46%	42%
Community centres and halls	30%	26%	33%	29%	31%	34%	22%
None 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+	!0 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
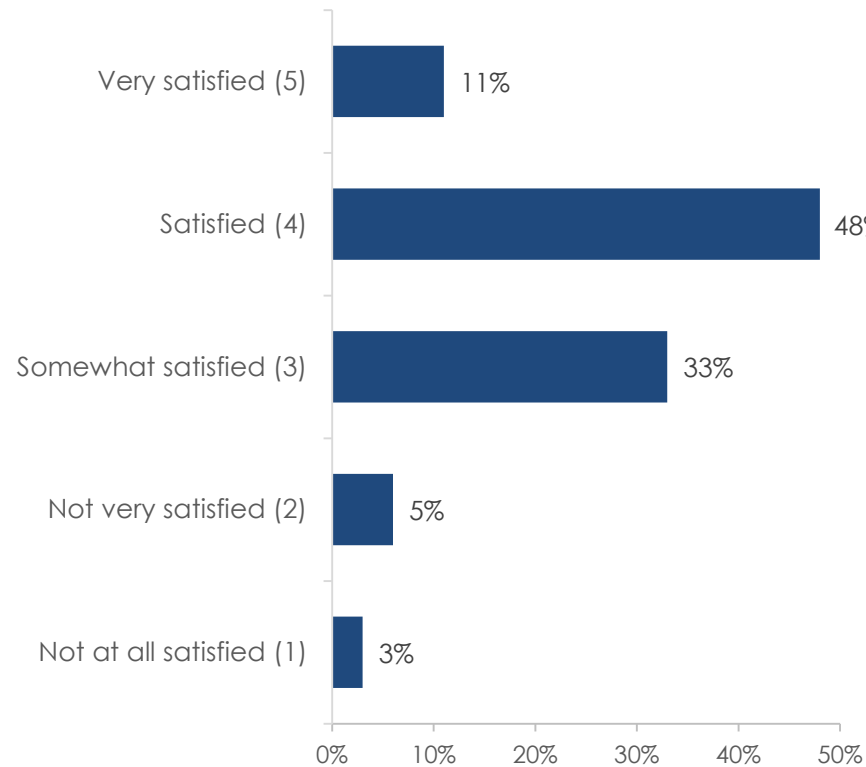
Section 1c:

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.

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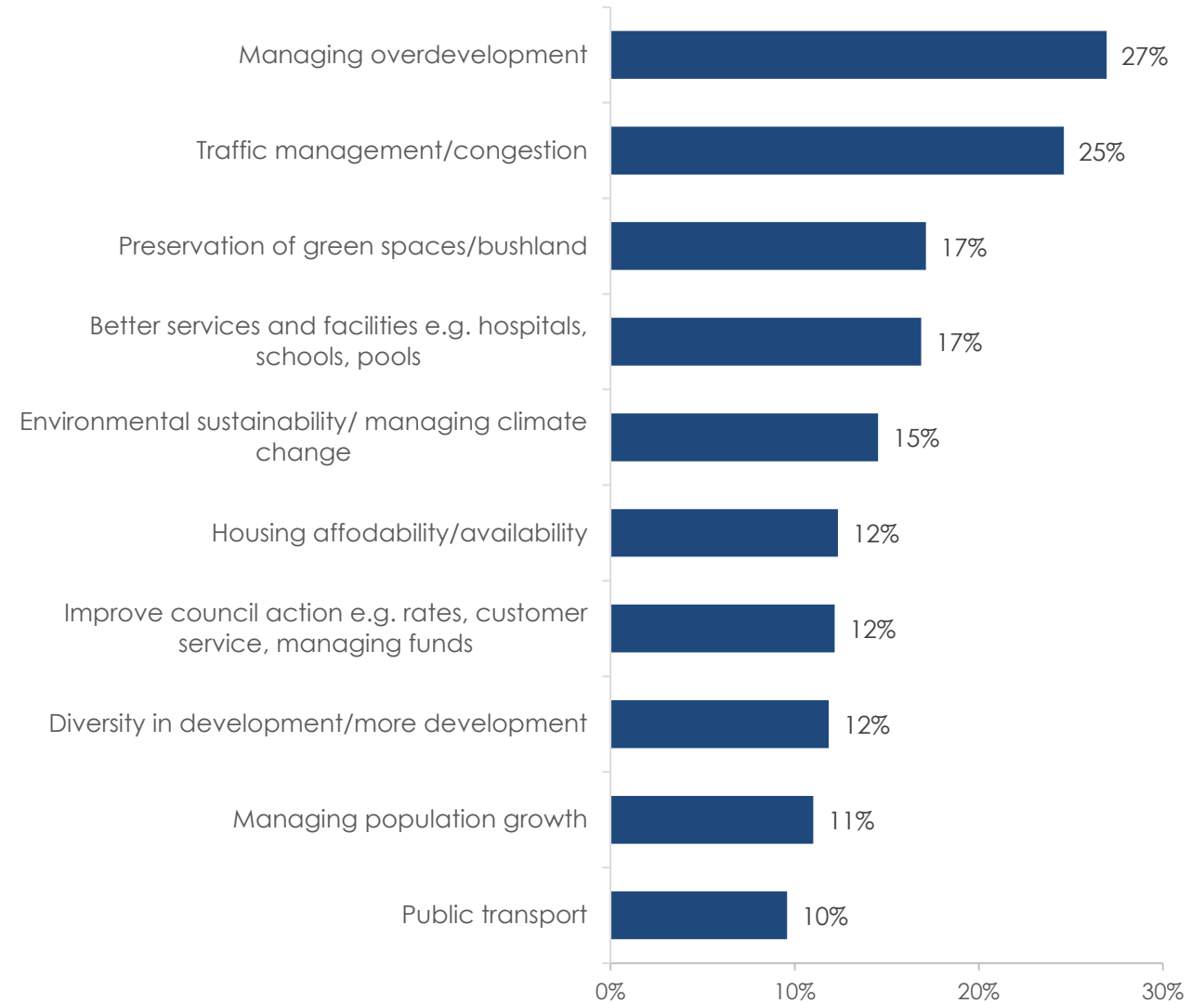
Priority Area	%
Managing overdevelopment	27%
Traffic management/congestion	25%
Preservation of green spaces/bushland	17%
Better services and facilities e.g. hospitals, schools, pools	17%
Environmental sustainability/ managing climate change	15%
Housing affodability/availability	12%
Improve council action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

Base: N = 401

Section 2a:

Business in North Sydney

Section 2a (Business)

micromex research

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.

Very satisfied (5) — 34%
Satisfied (4) — 42%
Somewhat satisfied (3) — 16%
Not very satisfied (2) — 5%
Not at all satisfied (1) — 3%
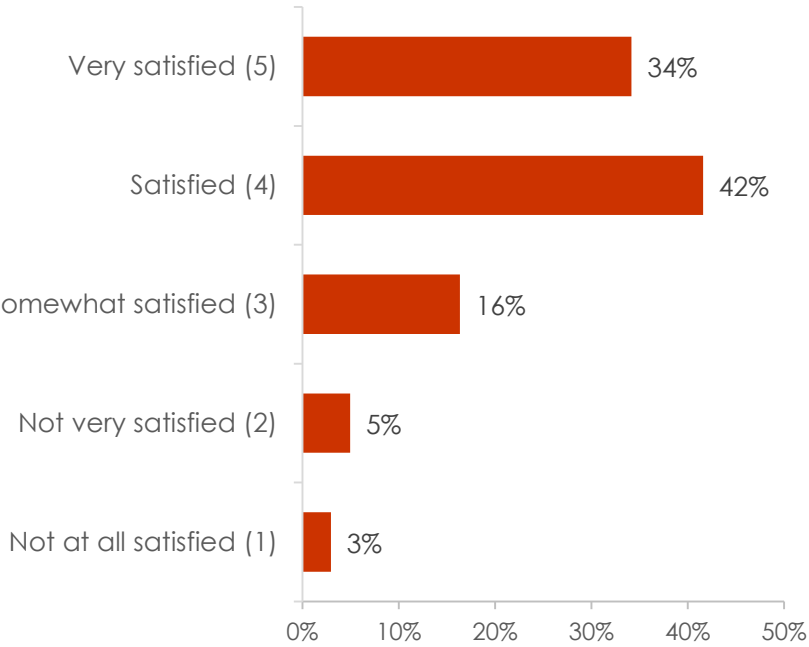
Year on Year Trend

	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.

Unsure/Don't Know , 26%

Yes, 49%

No, 25%
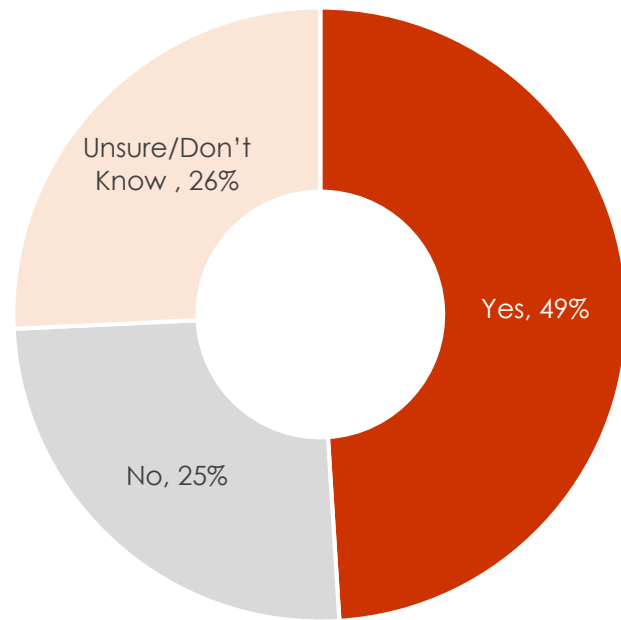
Year on Year Trend
Satisfaction with North Sydney's Strategic Direction

2010	2013	2016	2020	2023
45%	47%	56%	68%	49%
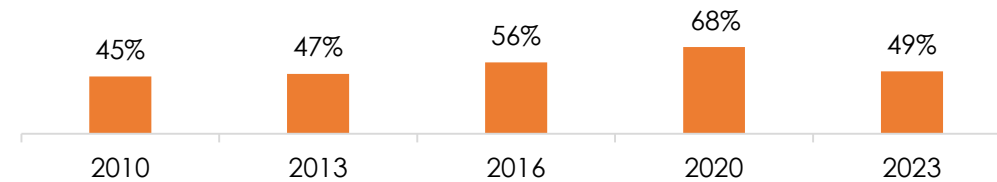
	Overall	Gender		Ward	
		Male	Female	St Leonards	Cammeraygal
Yes	49%	39%	61%	48%	50%
Base	202	109	92	83	119

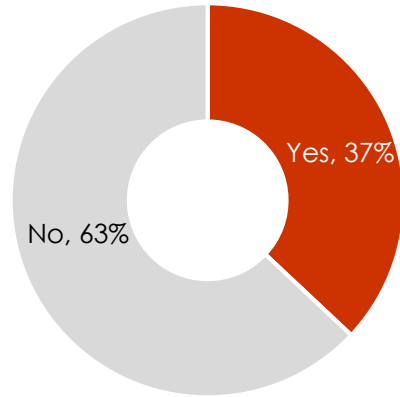|	Number of employees		Business Type					
	0-5	6 or more	Property and business services	Health and community services	Retail trade	Accommodation, cafes, and restaurants	Finance and insurance	Other businesses
Yes	45%	56%	47%	55%	53%	53%	71%	36%
Base	123	79	43	38	30	19	17	55

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)

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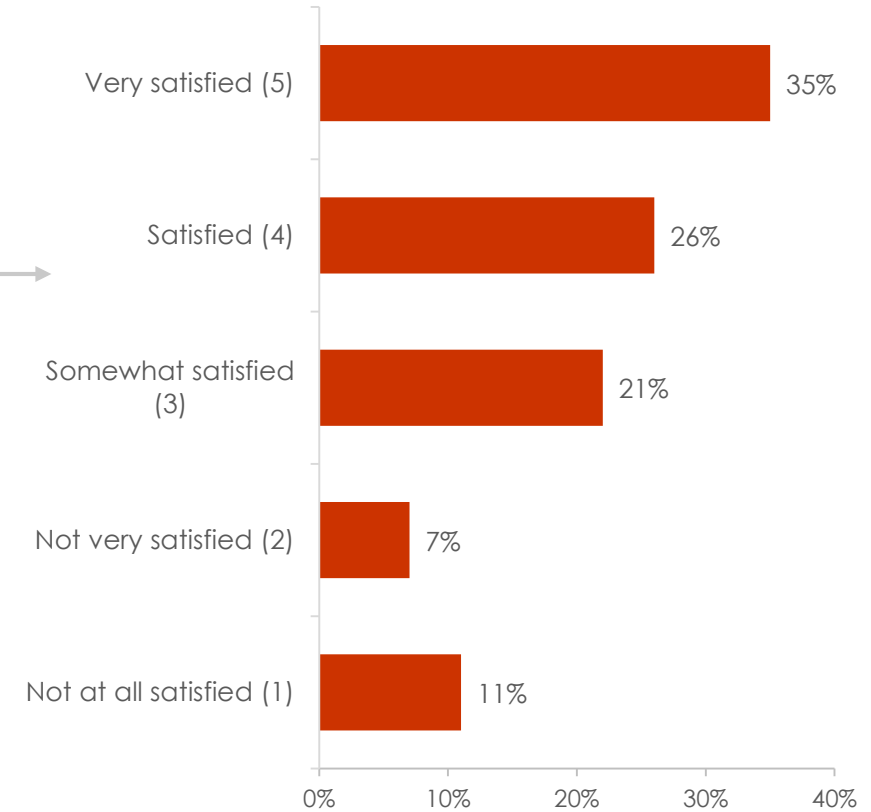
	Number of employees		Business Type					
	0-5	6 or more	Property and business services	Health and community services	Retail trade	Accommodation, cafes, and restaurants	Finance and insurance	Other businesses
Yes	37%	37%	44%	21%	37%	58%	29%	36%
Base	123	79	43	38	30	19	17	55

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)

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%
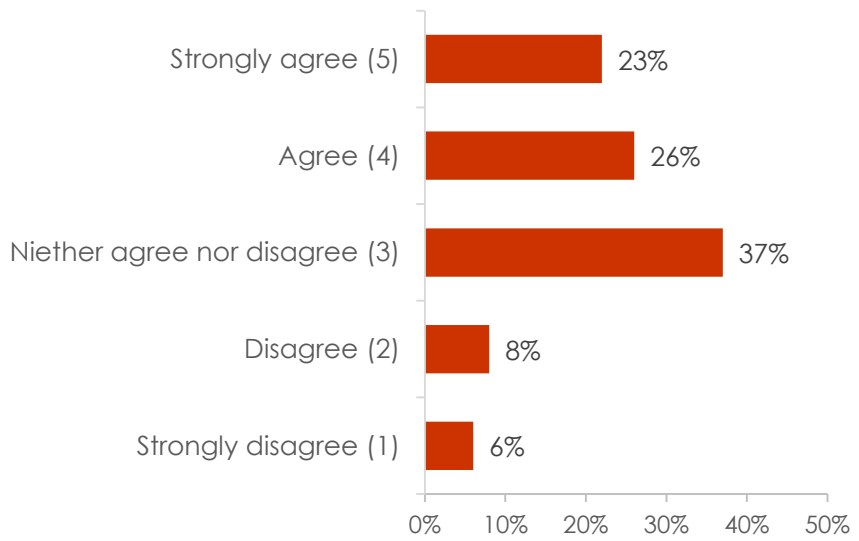
Year on Year Trend

	2023	2020
Mean rating	3.51	3.66*
Base	201	201

	Overall	Gender		Ward	
		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

	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%
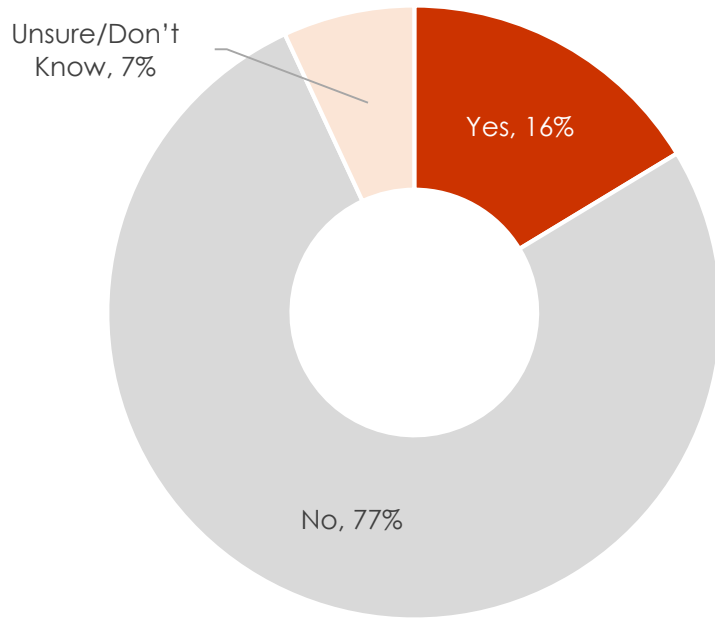
Base: N = 202

	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?

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.
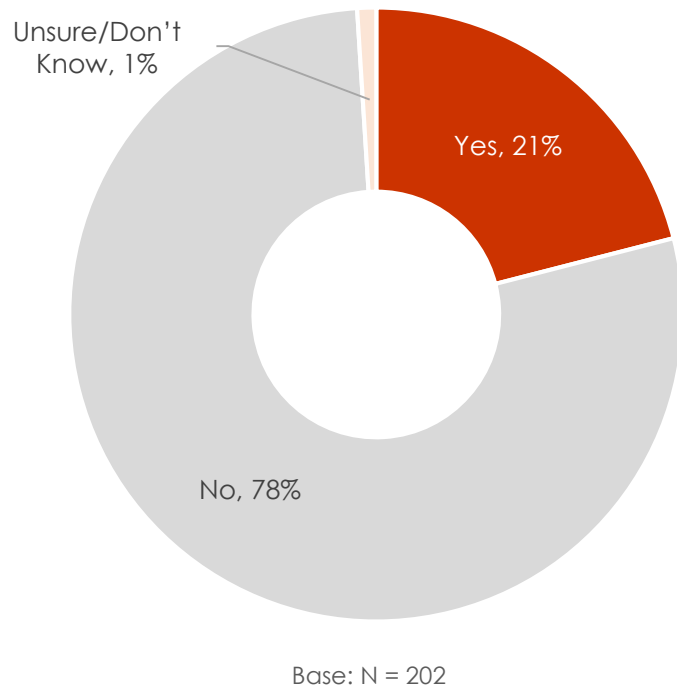
Year on Year Trend

Aware of Streetscape Committees

Unsure/Don't Know, 1%

Yes, 21%

No, 78%

Base: N = 202

2010 — 17%
2013 — 15%
2016 — 23%
2020 — 22%
2023 — 21%
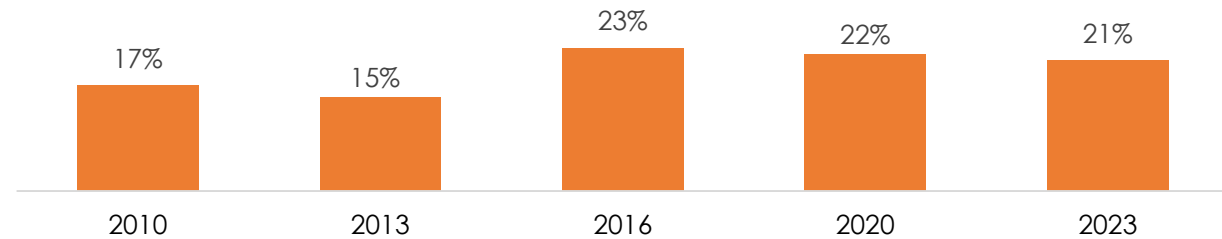
	Overall	Gender		Ward	
		Male	Female	St Leonards	Cammeraygal
Yes	21%	21%	22%	18%	24%
Base	202	109	92	83	119

	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).
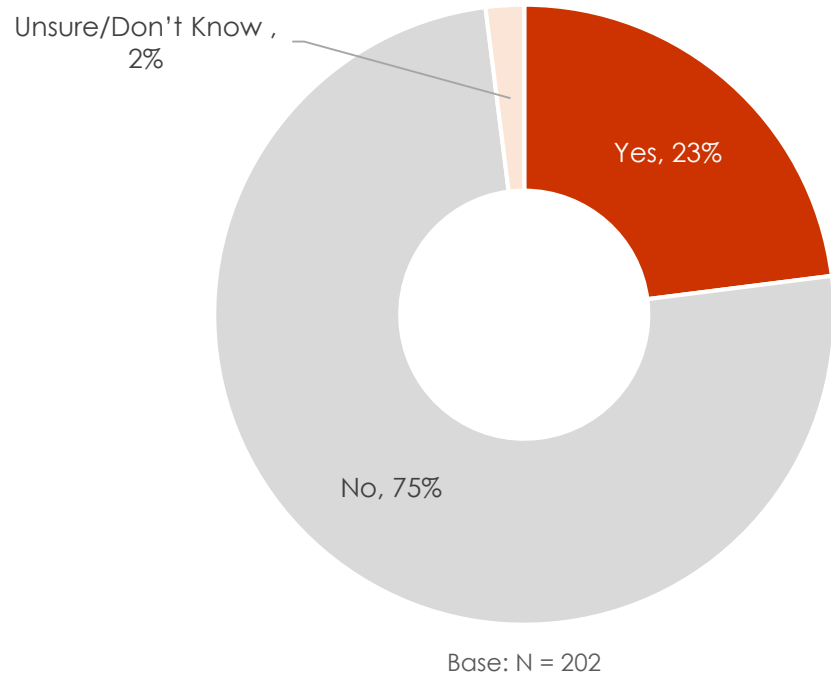
Unsure/Don't Know, 2%

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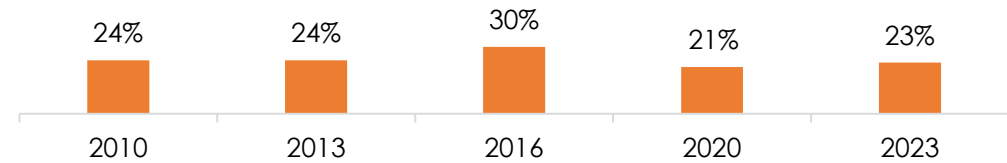
	Overall	Gender		Ward	
		Male	Female	St Leonards	Cammeraygal
Yes	23%	27%	18%	19%	25%
Base	202	109	92	83	119

	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*.
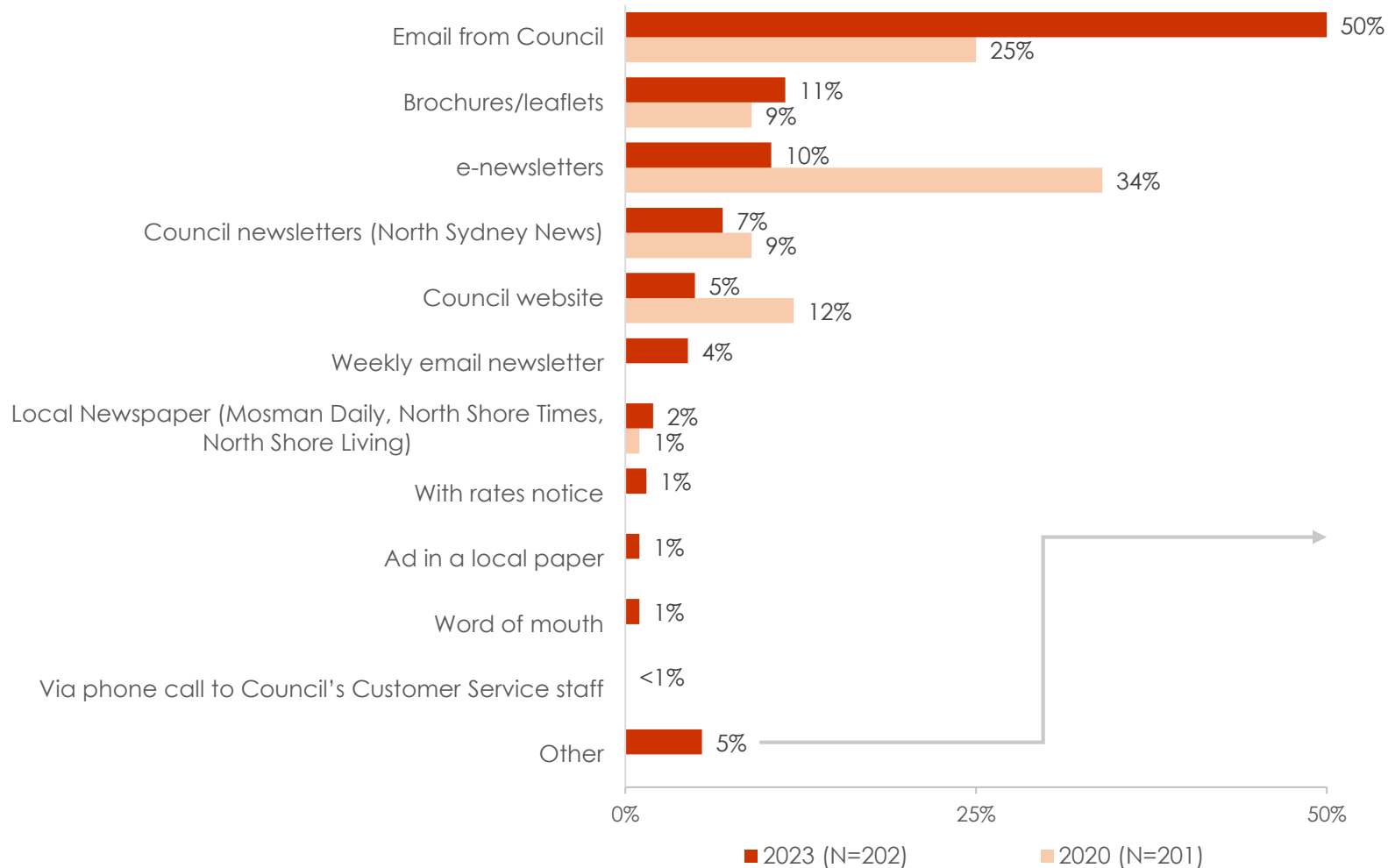
Other specified	N=202
Mail/Letter	4%
SMS	<1%
APP	<1%

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

■ 2023 (N=202) ■ 2020 (N=201)

*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)

51

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"

Category	%
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%
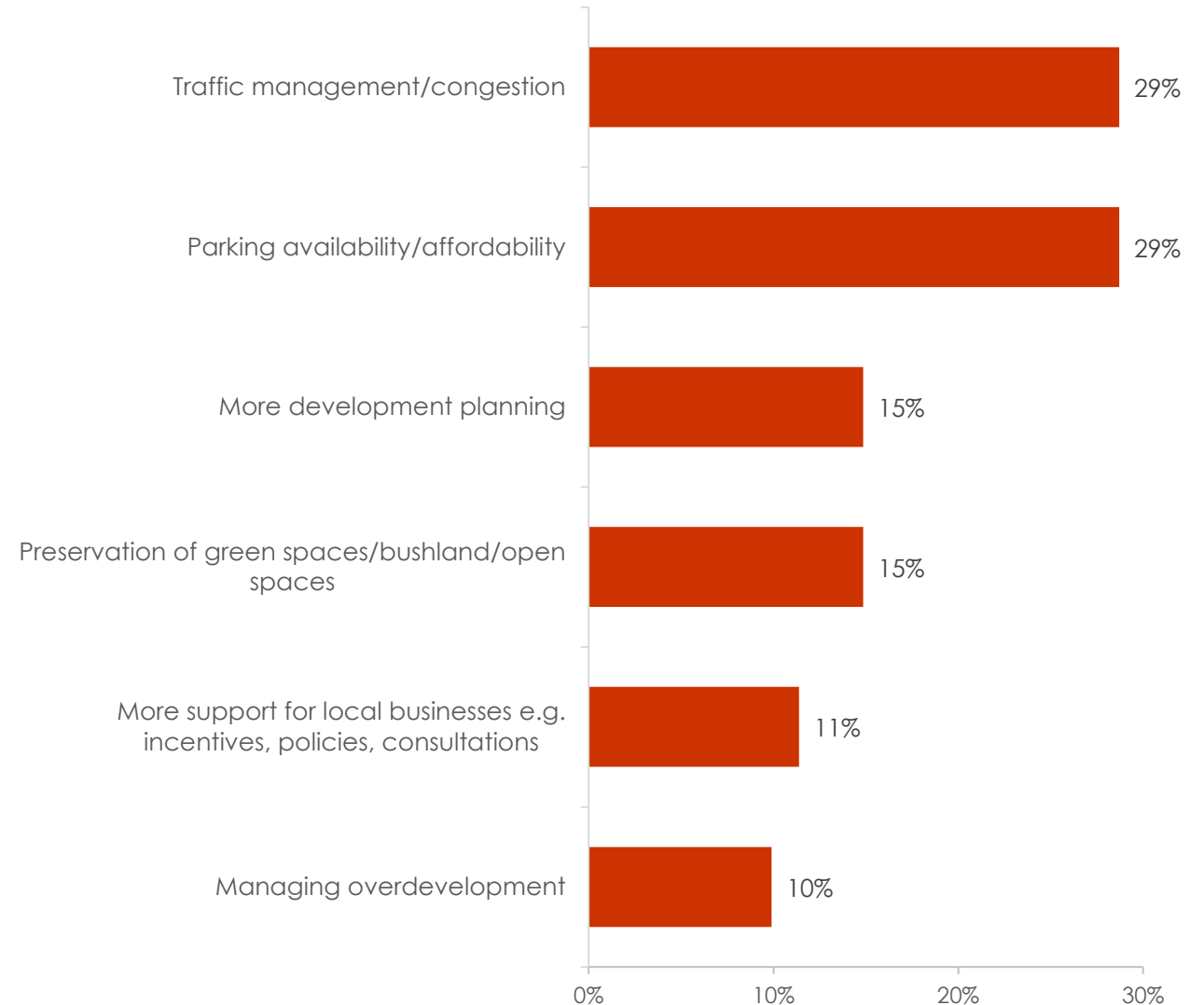
Base: N = 202

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.
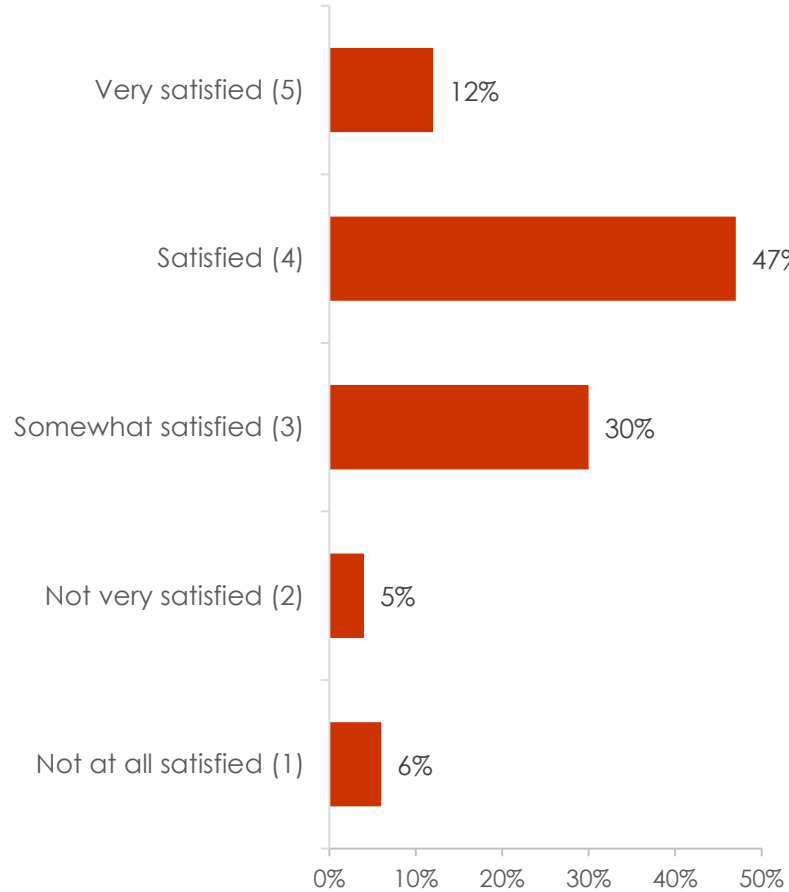
Bar chart:

- 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:
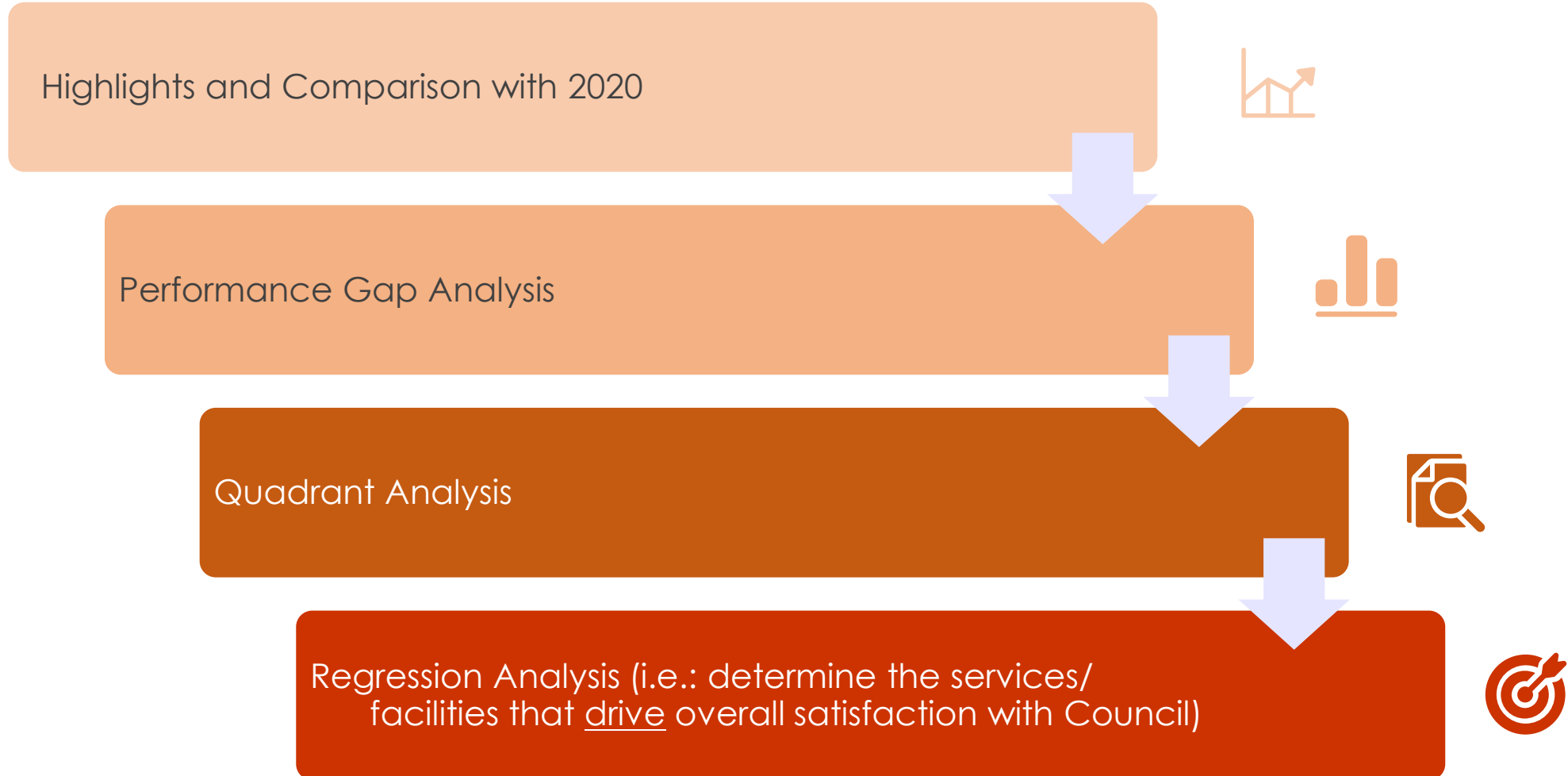
Highlights and Comparison with 2020

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

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

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

Importance

Satisfaction

North Sydney Council Average

- Provision of parking (53%, 93%)
- Long term planning
- Management of traffic flow
- Managing development/town planning
- Cleanliness of local roads and footpaths
- Maintenance of local roads
- Waste and recycling collection services
- Maintenance of footpaths
- Communication with local businesses
- 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
- Appearance of public spaces in the North Sydney CBD
- Building height and town centres

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%

(Chart x-axis: 0.0%, 10.0%, 20.0%, 30.0%)

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)*

Note: Please see Appendix 1 for complete list

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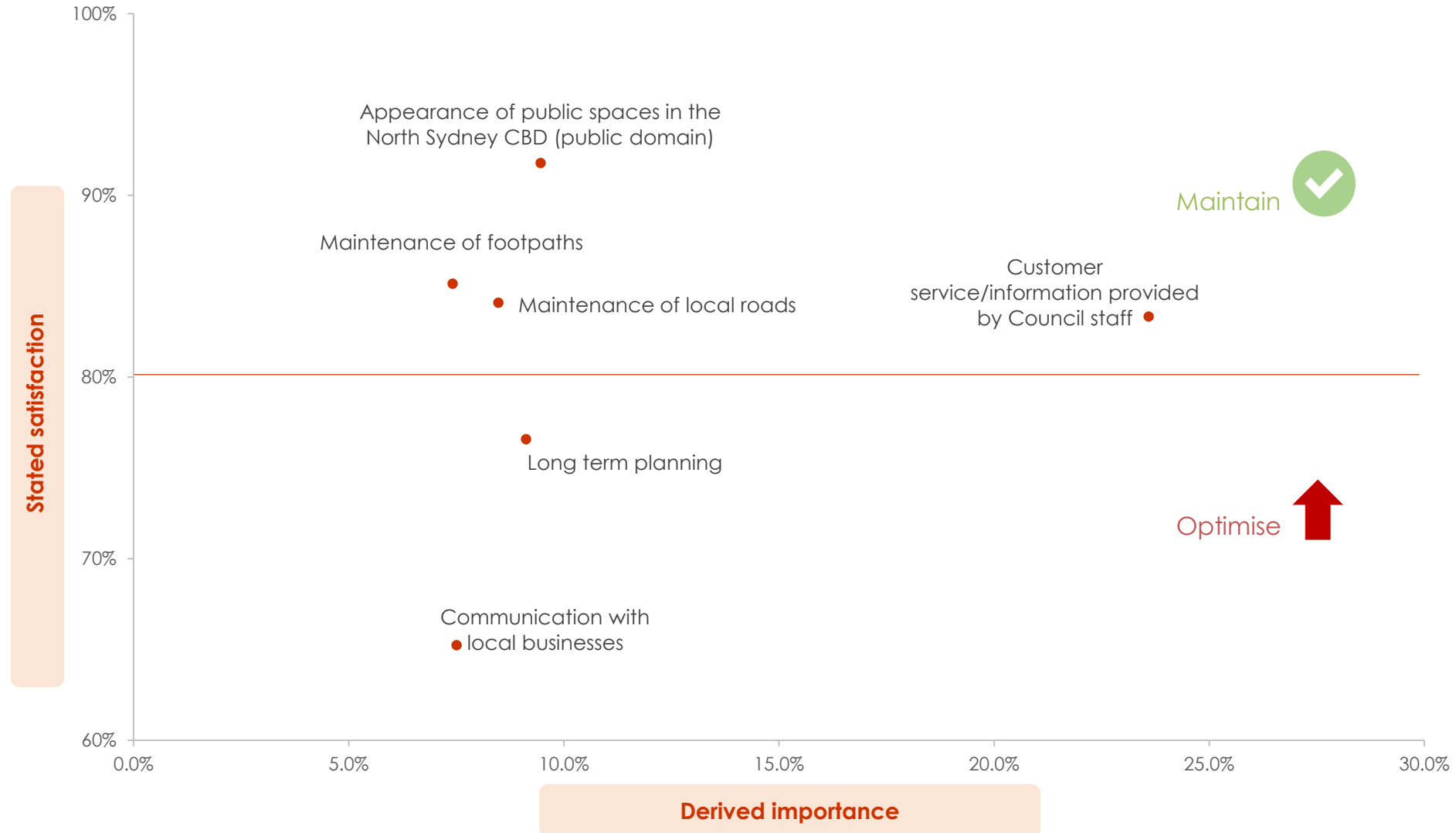
Contribution to Overall Satisfaction with Council's Performance – Business

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%.
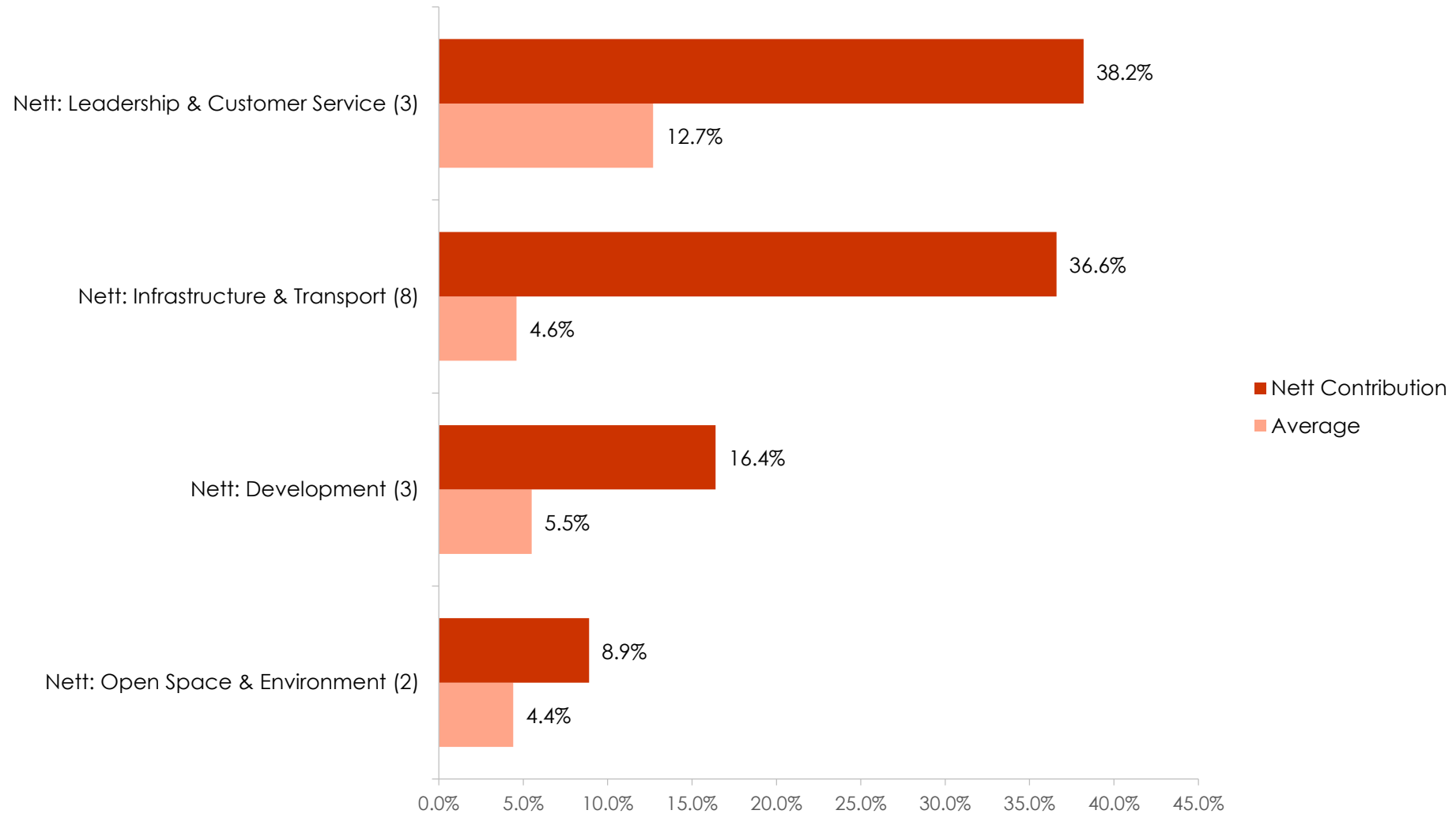
Legend:
- Nett Contribution
- Average

Chart data:

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

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

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.

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

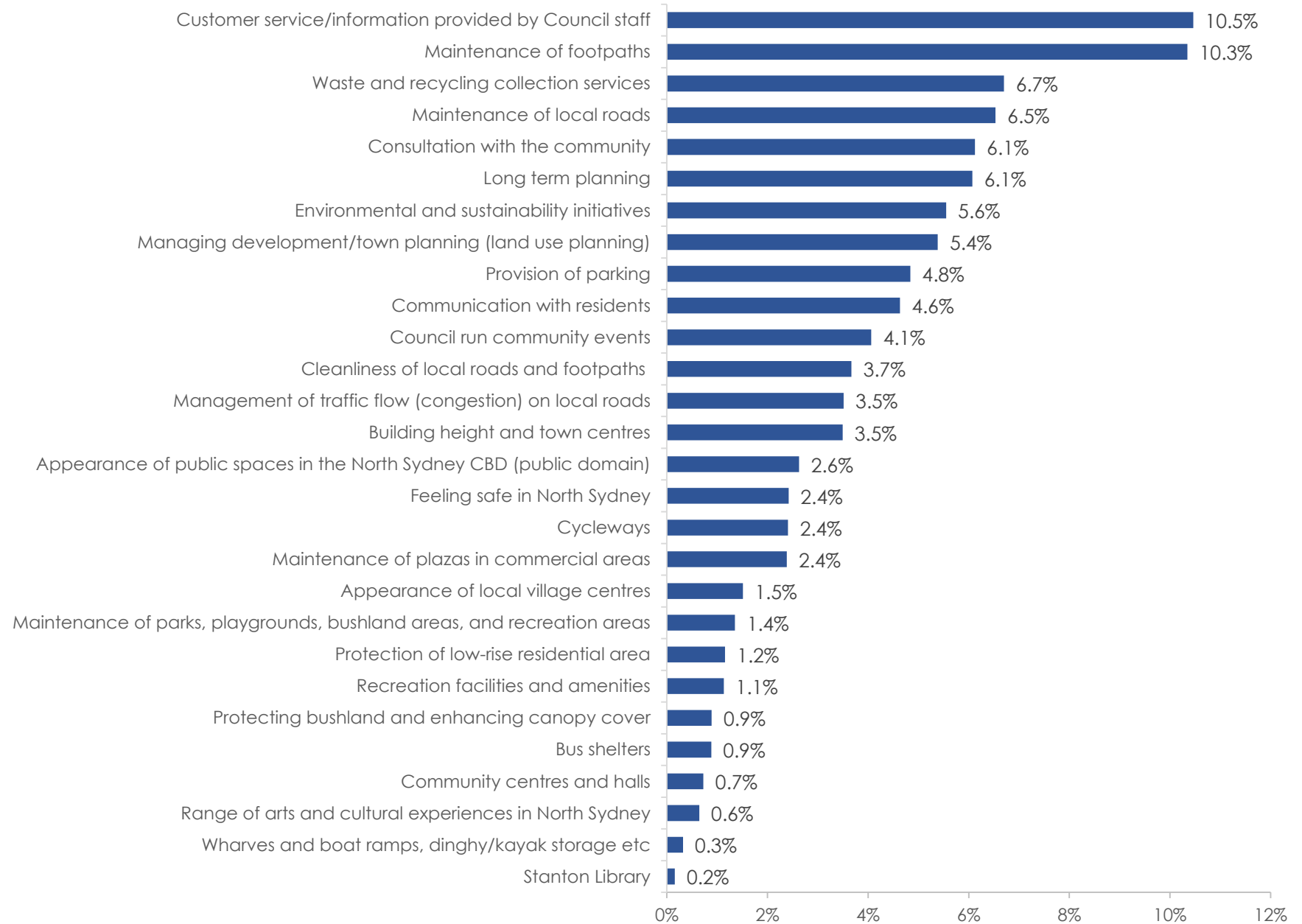| Service/Facility	Importance T2 Box	Satisfaction T3 Box	Performance Gap (Importance – Satisfaction)	Service/Facility	Importance T2 Box	Satisfaction T3 Box	Performance Gap (Importance – Satisfaction)
Long term planning	90%	71%	18%	Cleanliness of local roads and footpaths	90%	94%	-4%
Managing development/town 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

Regression Analysis – Influence on Overall Satisfaction – Resident

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/Facility	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%

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%		

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

202	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

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:

Questionnaire

Appendix 3

micromex
research

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 Low High 1 - 2 - 3 - 4 - 5	Satisfaction Low High 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 Low High 1 - 2 - 3 - 4 - 5	Satisfaction Low High 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 Low High 1 - 2 - 3 - 4 - 5	Satisfaction Low High 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 Low High 1 - 2 - 3 - 4 - 5	Satisfaction Low High 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 Low High 1 - 2 - 3 - 4 - 5	Satisfaction Low High 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.

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 Low 1 - 2 - 3 - 4 - 5 High	Satisfaction Low 1 - 2 - 3 - 4 - 5 High
1	Waste and recycling collection services		
2	Environmental and sustainability initiatives		

DEVELOPMENT

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

LEADERSHIP & CUSTOMER SERVICE

Code	Answers	Importance Low 1 - 2 - 3 - 4 - 5 High	Satisfaction Low 1 - 2 - 3 - 4 - 5 High
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.

micromex
research

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