COMMUNITY SATISFACTION SURVEY 2023 – ANALYSIS REPORT

June 2023

nf: 9987 – ks/gl/hb

newfocus

city of Victor Harbor

Contents

Background and objectives

Background

The City of Victor Harbor is a coastal municipality located on South Australia's Fleurieu Peninsula that is approximately 80 kilometres south of Adelaide. Victor Harbor enjoys a high standard of living and is regarded as an excellent place to live, work, invest and do business.

The City of Victor Harbor sought to understand the community's perception relating to its service delivery performance and seeks input from the community on services it can improve, add or remove from its portfolio. The Council also sought to invite comments from residents on both current service delivery and priorities for the future.

The Community Satisfaction Survey aims to provide Council with relevant, timely and statistically valid information on the community's awareness of Council-delivered services and associated satisfaction levels. It also provided for an assessment of Council's service delivery performance to serve as a baseline for benchmarking against future rounds of the research.

The inaugural 2022 Community Satisfaction Survey was set as a benchmark for future surveys. The 2023 research is compared against the 2022 research and analyses differences against the primary objective of the research, which was to understand City of Victor Harbor residents' and customers' preferences and their satisfaction with current services and desire for additional services.

Objectives

- Understand the community's perception relating to its service delivery performance
- Ascertain residents' channel preferences
- Establish future communication requirements and trends
- Measure current channel usage and effectiveness
- Explore services improvements, additions, or reductions in its portfolio

Methodology

Mixed modal

Computer Assisted Telephone Interview (CATI)

Online survey (Social media)

Residents

- Randomly selected CATI sample (n=300) of adult residents of the City of Victor Harbor area
- Top up sample (n=50) of younger aged adult residents via social media online survey
- CATI sample sourced from publicly available databases, a mix of landline and mobile phones
- All CATI interviews conducted in-house by new**focus'** team of field interviewers under supervised conditions
  - A total of 11 interviewers were used and 10% of interviews were validated by a field supervisor
- Resident surveys were conducted from 6 March to 20 March 2023
- Average survey length was 12 minutes for CATI and 12 minutes for social media

Businesses

- Randomly selected CATI sample of (n=100) businesses within City of Victor Harbor area
- Sourced from lists supplied by the City of Victor Harbor Council
- All CATI interviews conducted in-house by new**focus'** team of field interviewers under supervised conditions
- A total of seven interviewers were used and 10% of interviews were validated by a field supervisor
- Business surveys were conduced from 8 March to 18 March 2023
- Average business survey length was 12 minutes

Non-resident Ratepayers

- N=81 non-resident ratepayers responded to the survey
- Emailed via a database (approximately 900 contacts on lists) (by Council) to have their say, with two reminder emails sent. Social media advertising targeted suburbs outside of the City of Victor Harbor with high rates of non-resident ratepayers to assist in boosting response rates
- Non-resident ratepayer surveys were conducted from 21 March to 12 April 2023
- Average survey length was 16 minutes

All research was conducted to ISO:20252:2019 industry standards

Sample achieved and sampling accuracy

Sample

- A total sample of n=533 City of Victor Harbor customers was achieved
  - Resident CATI sample of n=300 and resident social media sample of n=52
  - Business CATI sample of n=100
  - Non-resident ratepayer sample of n=81

Sample weighting to population for residents

The resident sample was weighted by age and gender based on ABS 2021 Census data (note that 2022 based on ABS 2016 Census data). Targets were nevertheless set by age and gender to ensure a good distribution of residents between gender categories and across age cohorts, with final weighting within 5% of the raw sample for age and 1% for gender.

The table to the right provides a breakdown of the achieved sample and associated weighting where applicable.

Sampling accuracy (residents)

Sampling accuracy at 95% Confidence interval for a sample of n=352 residents from the City of Victor Harbor adult population of 13,722 (population figures based on ABS Census 2021 figures):

One point in time*	Over time**
±5.16%	±7.30%

Resident sample 2023***	CATI		Online		Total		Weighting	
	n	%	n	%	n	%	n	%
Gender								
Male	141	47%	20	40%	161	46%	162	46%
Female	159	53%	30	60%	189	54%	188	54%
Age								
18-34	24	8%	21	42%	45	13%	44	13%
35-49	35	12%	18	36%	53	15%	52	15%
50-59	32	11%	10	20%	42	12%	47	13%
60-69	57	19%	1	2%	58	17%	74	21%
70+	152	51%	-	-	152	43%	133	38%
Total	**300**	**100%**	**50**	**100%**	**350**	**100%**	**350**	**100%**

Business Sample 2023	CATI	
	n	%
Gender		
Male	63	63%
Female	37	37%
Age		
18-34	6	6%
35-49	32	32%
50-59	24	24%
60-69	30	30%
70+	8	8%
Total	**100**	**100%**

Non-resident ratepayer sample 2023	Online	
	n	%
Gender		
Male	41	52%
Female	38	48%
Age		
18-34	-	-
35-49	15	19%
50-59	14	17%
60-69	36	44%
70+	16	20%
Total	**81**	**100%**

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*Refers to confidence that the true result (i.e., if one was to survey ALL Victor Harbor adult residents) would fall within + or – 5.16% of the sample result
**Refers to the degree of change needed between results at two different points in time to reach statistical significance
*** Prefer not to say responses not included

How to read reported data

Tables and charts are reported in percentage results. Due to rounding some scores may range from 99% to 101%.

n = value

The n= value in the tables and charts represents the total number of respondents included in the study and the number of respondents that answered a specific question (including ‘don’t know’ responses except where noted).

Statistical significance indicators

↑ and ↓ labels on charts indicate statistically significant differences between 2022 and 2023 for total sample and by community segments, as well as categories (gender, age at 2023 data level) at the 95% confidence level, with ↑ denoting a higher result and ↓ denoting a lower result. On tables the same categories are shown with green highlighted figures indicating a higher result and red highlighted figures a lower result.

Executive summary

Satisfaction with the City of Victor Harbor's overall performance remained relatively steady in 2023, with a marginal decline of 2% for those who were satisfied or very satisfied. The percentage of respondents who indicated they were dissatisfied or very dissatisfied with Council's overall performance increased by 4%.

The results of the 2023 Community Satisfaction Survey are reflective of the circumstances faced by the City of Victor Harbor over the previous 12 months that have put pressure on service delivery including:

- Compounding effects of staff absences as a result of COVID-19;
- Extended period of staff absences for a range of other reasons; and
- Significant resources required to deliver Council's corporate systems replacement project

In recognition of the circumstances above, in August 2022 the Council made changes to its Customer Service Charter to manage organisational risks, allowing for longer timeframes to respond to customers. This impacts customer experience.

In terms of each of the sample groups, non-resident ratepayers were seen to be the most satisfied with Council services with increases across the majority of service areas. Most notably was a 21% increase in satisfaction with waste management and recycling services, and a 15% decrease in satisfaction with public and environmental health services.

Satisfaction levels within the resident sample remained relatively steady with the largest decrease, a 6% drop in satisfaction for recreation opportunities such as sporting facilities, walking trails and bike paths. The most significant change in satisfaction for residents was a 7% increase in satisfaction for arts and cultural activities.

The business sample was the most dissatisfied with Council services with only one of Council's 18 service areas experiencing an increase in satisfaction levels (7% increase in satisfaction for waste management and recycling services). The remaining services experienced increases in dissatisfaction ranging between 5% and 29%. The most significant changes within this cohort related to aged and disability services, open space provision and maintenance, and providing community centres, halls and public spaces, which experienced an increase in dissatisfaction of 29%, 19% and 18% respectively.

The following outlines a brief summary of the 2023 survey results by category. It should be noted that changes of +/- 7.3% at a total sample level are considered to be statistically significant at a 95% confidence interval. Further details on sampling accuracy can be found on page 5.

Executive summary of results (continued)

Importance vs satisfaction – planning and infrastructure services:

- The community perceive the provision and maintenance of roads and footpaths as most important (95% in 2023), however satisfaction with this service area is lowest of all council services (29%).
- There was a significant decrease in the business sample's perception of importance of services that preserve and promote local heritage (includes built, natural and indigenous).
- Council continues to perform best on maintenance of parks, gardens, reserves and open spaces (satisfaction at 62%) which supports the high level of importance placed on this service area (90%).

Importance vs satisfaction – community services:

- Services that support older residents, along with disability services, were perceived as most important, with satisfaction of 55% and 49% respectively.
- Library services continue to excel, achieving the highest satisfaction level of all Council services at 83%, however the perception of importance of this service has dropped slightly to 67%.
- Arts and cultural services achieved a 5% increase in satisfaction with a slight drop (2%) in importance, 56% in 2023.
- The service perceived to be the most important by the business sample was providing support for local businesses (91%) yet this service area achieved the lowest satisfaction rating within this sample decreasing 9% to 25% satisfied. This sample also experienced significant declines in satisfaction for aged and disability services, and provision of community, centres, halls and public spaces.
- While importance and satisfaction ratings did increase, more than one in three non-resident ratepayers often provided "don't know" responses on Council community service satisfaction metrics.

Importance vs satisfaction – environmental services:

- Satisfaction with waste management recycling services increased by 5% and was deemed most important of the three environmental services measured.
- Satisfaction with costal protection and environmental management activities decreased by 6% (attributed to significant increase in dissatisfaction) in 2023.
- Satisfaction with waste management and recycling services increased in 2023 for both resident (up 4% vs 2022) and business (up 7%) samples, a positive result given the high level of importance placed on this particular service.

Satisfaction with Council performance

- Satisfaction with Council performance overall remained moderate at 43% in 2023, down 2% (30% neutral, 26% dissatisfied)
- Resident satisfaction shifted by 3% from satisfied to dissatisfied, whereas businesses recorded a larger proportion of change, with just over 1 in 3 dissatisfied with Council's overall performance, attributed to decreases in satisfied and neutral satisfaction ratings.
- Notable decrease in satisfaction with 3 of 4 metrics used to measure Council performance, with an inverse significant increase in dissatisfaction.
- Whilst currently at a moderate-to-low level, Council is perceived to perform best on providing the community with opportunities to have their say (41%), and least on satisfaction with fairness of rates (28% satisfied and 44% dissatisfied).
- Both resident and business satisfaction with Council performance metrics decreased, with the most dissatisfied area being that rates are fair and reasonable for services and infrastructure provided (31% residents and 21% business) and that Council operates in a financially responsible manner (36% and 35%).
- While levels of satisfaction increased for non-resident ratepayers to moderate levels for decision making in the best interest of the community and opportunities to have their say, there is still a lower level of dissatisfaction on the perception of operating in a financially sustainable manner and that rates are fair and reasonable.

Executive summary of results (continued)

Council communications – satisfaction with customer service

- 47% stated having contact with Council in the last 12 months (52% in 2022).
- Business contact increased by 3%, whereas resident contact decreased significantly (51% to 42%). Fifty-four percent of non-resident ratepayers had some form of contact with Council.
- Of those who had contact with Council, 57% were satisfied with the customer service overall, a considerable decrease from 72% in 2022.
- Satisfaction for methods available to liaise with Council dropped by 15%, while perception of the helpfulness and knowledge of staff - and satisfaction with response times all decreased by 10% and 12% respectively. These changes are statistically significant and align with the amendments made to the Council's customer service charter in the lead up to the survey.
- The most notable change in satisfaction with customer service measures was recorded within the business sample. Overall satisfaction with customer service decreased by 20%.

Council communications – recall and methods received

- Recall of Council related information was quite high at 77% in 2023, a 6% increase compared to 2022.
- The local newspaper was the top source for information about Council, increasing by 9% to 41% in 2023. Email and Council social media communications followed as the equal second most recalled communication channels (22%).
- Businesses continue to appear more digitally-inclined in their recall than residents, however to a lesser extent than 2022. Both the residents and business community would stand to benefit from greater use of email contact / or direct paper mail.

Suggested areas for improvement

- Over 1 in 2 suggested civil planning as an area that required the most improvement. This was explained as the improvement of roads, street-scaping and management of land development.
- Other suggested areas for improvement included financial management (perception that more efficiency with finances is required), community engagement (increase engagement through more planning meetings) and rubbish management (collection frequency, extra hard waste days and better waste management).
- While relatively consistent with suggestion areas for improvement, businesses had greater emphasis on civil planning (28% stating repair roads, 14% improve street scaping) and financial management overall. This is unsurprising given this cohort's lower satisfaction ratings relating to infrastructure services and Council acting in a financially responsible manner.

Importance of development areas

- The Regional Community Sport, and Recreation Precinct remains the most important major project priority for the community, with 67% providing a rating of 4-5 (out of 5). The McKinlay Street car park was perceived as second most important major project priority with an importance rating of 59%, up 2% from 2022.
- The overall community view on an Arts and Culture Centre also shifted somewhat, with a significantly lower proportion of importance (37%) and increased unimportance (up 10% from 2022 to 34%). This indicates this project is not as high a priority as other development areas at this point in time.
- Interestingly, businesses experienced a higher level of fluctuation in what they believed was important as a development area when comparing to 2022 results. While still the most important area, a 17% decrease was seen for the Regional Community, Sport and Recreation Precinct.

Conclusions, recommendations and considerations

1. **Planning and Infrastructure Services:** Given the lowest level of satisfaction and increased importance in 2023 in providing and maintaining roads and footpaths, Council may wish to explore how it prioritises budget allocation to increase investment / focus in this service area.

2. **Environmental Services:** An increase in satisfaction with waste management and recycling services is a positive step. Continue to monitor and work on this area, given the high level of importance placed on this service. Ongoing education and promotion of the positive outcomes of fortnightly collection may assist to further increase satisfaction. Coastal protection and environmental management activities remain of high importance to the community with overall satisfaction decreasing, supporting consideration of further investment in this space.

3. **Community Services:** Whilst importance was highest for services relating to older residents, satisfaction decreased for aged and disability services. Given the older demographic (52.6%* aged 60 years and older of the total population) of the City of Victor Harbor area, focus will be required to ensure the community perceive they are receiving the services they require.

4. **Customer Service:** While just under 1 in 2 had contact with Council in the past 12 months, overall satisfaction and satisfaction with customer services aspects decreased significantly, aligning with changes made to customer service standards. The impacts of staff shortages as a result of COVID-19 and leave may have impacted the community customer service experience. Customer service journey could be an area of further investigation amongst the community, in particular, consideration of an extension of methods to liaise with Council, increasing knowledge levels of contact topics and ensuring response times meet expectations.

5. **Communications:** There continues to be a good level of recall of Council communications, with over 3 in 4 recalling Council related information in 2023. Whilst there was a broad range of channels used, the four main channels were the local newspaper (increased recall), email, social media and direct mail in the letterbox (decreased recall on the latter two channels). Given the increase in Local newspapers (even amongst non-resident ratepayers) Council may wish to further utilise this tool to increase awareness and communicate Council messaging. Residents and businesses would stand to benefit from greater receipt of email contact and direct mail.

*Figure based on ABS Census of Population and Housing Victor Harbor (LGA48050) General Community Profile

Conclusions, recommendations and considerations (continued)

7. **Overall Performance:** Satisfaction with Council's overall performance decreased for residents and more so businesses, with non-resident ratepayers the most satisfied with Council's overall performance in 2023 (just over 1 in 2 satisfied). In terms of Council performance measures, all decreased (significantly for 3 of 4 metrics) to low levels of satisfaction. It is suggested that Council focus on communicating with residents, and more so businesses, that Council is making decisions in the best interest of the community, and that decisions are considered in a financially responsible manner. There is an opportunity to increase awareness of the services and infrastructure that are funded through council rates (and outcomes), to enhance the value of these services within community perceptions.

8. **Major Project Priorities:** When presented specifically with major projects to ascertain priorities for development, the Regional Community, Sport and Recreation Precinct remained the most important across all groups. While still achieving the highest level of associated importance within the business community surveyed, the level of importance of this project did decrease. It will be important to continue to communicate the economic benefits such a hub will have to the Victor Harbor community and associated businesses in the area. Increased importance of the McKinlay Street Car Park also suggests that this is an area of development that should be considered to be a priority. There was a notable decrease in the associated importance across all community segments (significant for residents and businesses) for the Arts and Culture Centre, suggesting there is an opportunity to consider the future scheduling of this project.

9. **Non-resident Ratepayer sample:** Given non-resident ratepayers were communicated to via email in 2023 and improvements were seen in ratings across the board, this likely showcases a more representative view of this cohort. In 2022, the overall sample of non-resident ratepayers was small and lower levels of satisfaction may reflect a disgruntled subgroup rather than the broader non-resident ratepayer community. It is therefore required to interpret results over time with care and treat 2023 data as more of a benchmark for future surveys.

IMPORTANCE VS SATISFACTION OF COUNCIL SERVICES, FACILITIES AND PROGRAMS

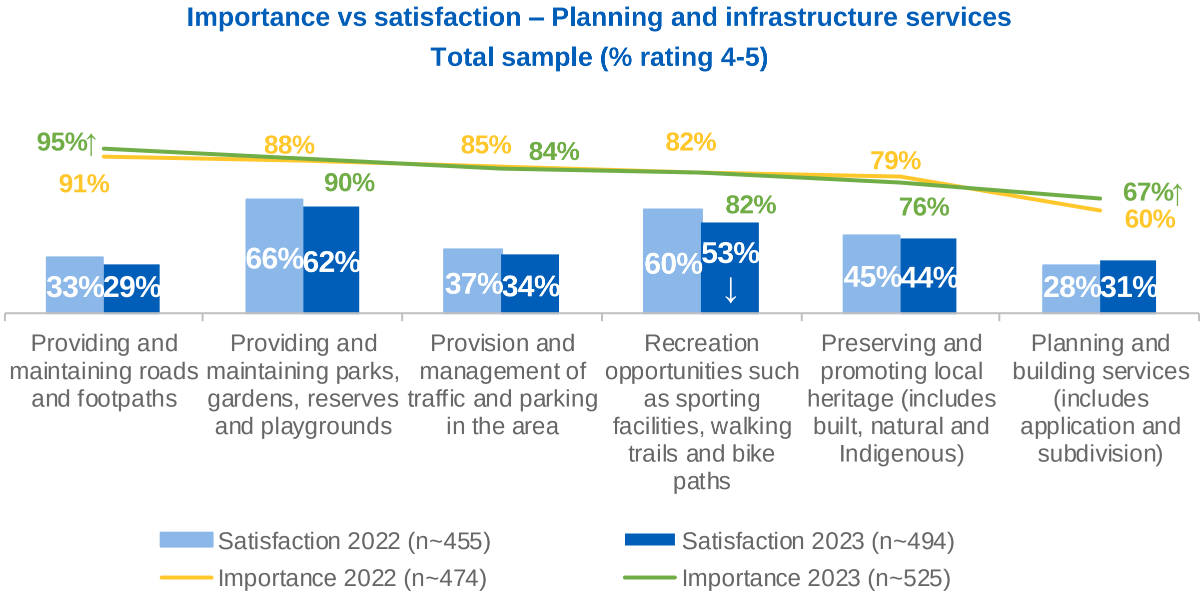
Section 1

**note resident data shown in this section is from sample collected via CATI and social media only*

There was a statistically significant increase in the perception of importance for maintaining roads and footpaths as well as planning and building services in 2023. Satisfaction relating to recreation opportunities decreased by 7%.

Overall, performance continues to be higher on services related to maintenance of parks, gardens, reserves and playgrounds. Satisfaction with the provision of recreation opportunities decreased by 7%.

Lowest levels of satisfaction with planning and infrastructure services remain for aspects relating to maintenance of roads / footpaths and management of traffic and parking.



Q1a - In relation to planning and infrastructure services provided by Council, how important is each service to you (using the scale 1 = Not important to 5 = Very Important) and how satisfied are you with each service (using the scale 1 = Very dissatisfied to 5 = Very satisfied). Don't know response excluded

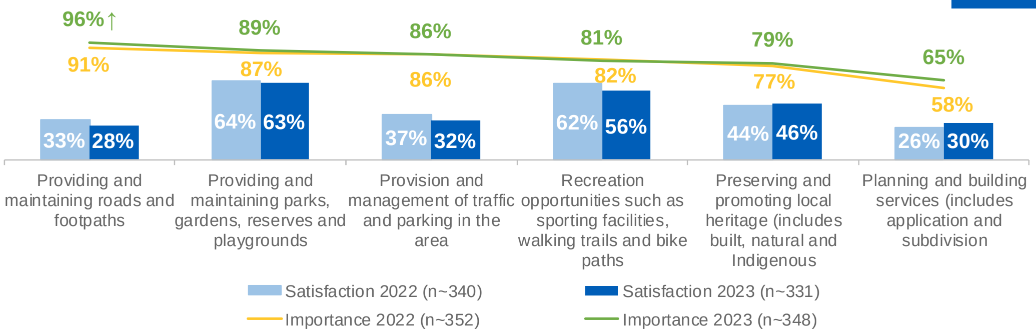
Importance vs satisfaction – Planning and infrastructure services

Residents placed a higher level of importance on providing and maintaining roads and footpaths in 2023, an increase of 5%. While satisfaction with this service decreased by 5% to 28%.

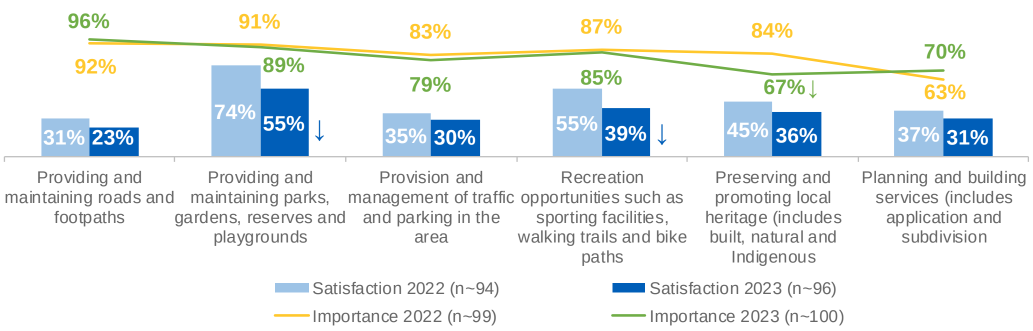
Importance levels remained relatively consistent amongst the business community, apart from the 17% decrease relating to preserving and promoting local heritage. Satisfaction ratings decreased across all planning and infrastructure services amongst the business sample, significantly so for maintaining parks, gardens and reserves, along with recreation opportunities.

Some variance in importance for non-resident ratepayers. In comparison to 2022, higher importance was placed on recreational opportunities, but less importance placed on planning and building services, as well as preserving and promoting local heritage. It is important to note that sample composition was different in 2023, comparison results to be interpreted with caution.

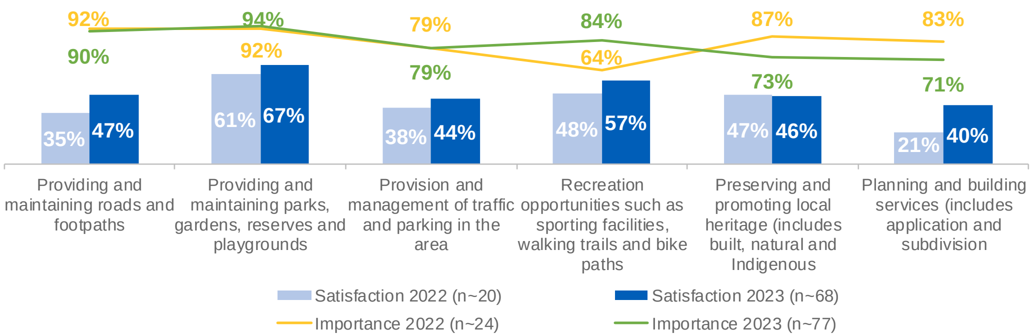
Resident sample (% rating 4-5)



Business sample (% rating 4-5)



Non-resident ratepayer sample (% rating 4-5)



Q1a - In relation to planning and infrastructure services provided by Council, how important is each service to you (using the scale 1 = Not important to 5 = Very Important) and how satisfied are you with each service (using the scale 1 = Very dissatisfied to 5 = Very satisfied)
Small sample sizes apply, Don't know response excluded

Importance of planning and infrastructure services varied across different age cohorts in 2023. Residents aged 50 to 59 placed a significantly lower level of importance on providing and maintaining roads and footpaths (86%), compared to all other age groups, with importance rated at 96% or above (100% for those aged 35 to 49). The 18 to 34 age bracket placed significantly less importance on providing and maintaining parks, gardens, reserves as well as planning and building services, compared with all other age brackets. Inversely, 79% of residents aged between 60 to 69 placed a higher level of importance on planning and building services in comparison to other demographics. Residents aged 70+ were more satisfied with recreation opportunities, however 35 to 49 year olds were significantly less satisfied at just 40% satisfaction, suggesting more recreation opportunities are required for this age cohort.

Importance vs satisfaction – Planning and infrastructure services 2023

(Resident sample)

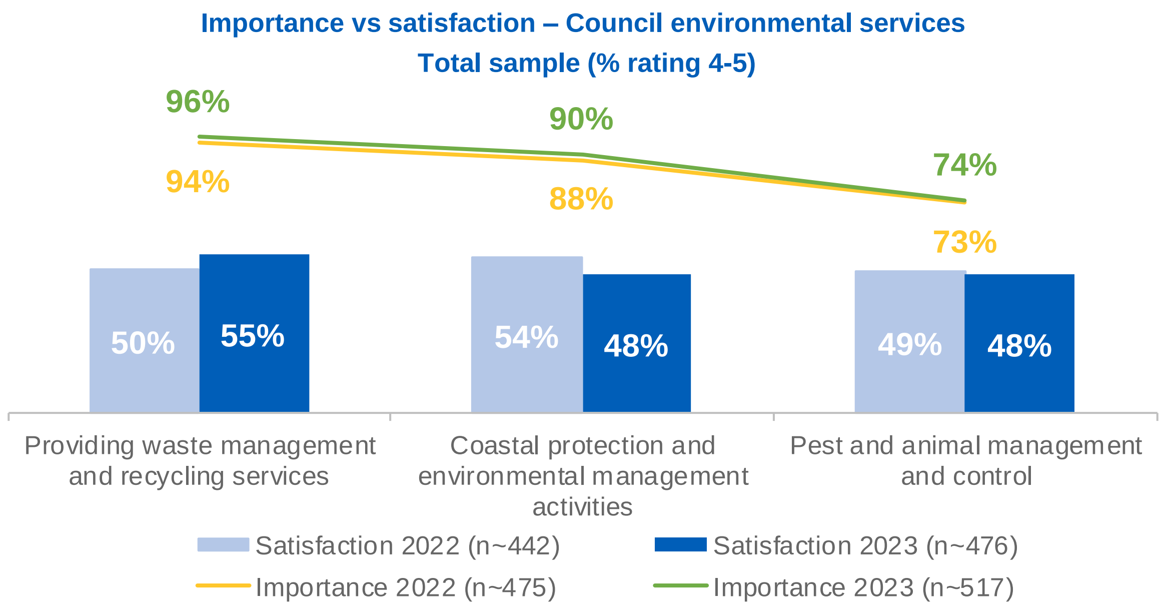
	18 to 34		35 to 49		50 to 59		60 to 69		70+		Male		Female	
	IMP (n~43)	SAT (n~42)	IMP (n~52)	SAT (n~50)	IMP (n~47)	SAT (n~44)	IMP (n~74)	SAT (n~71)	IMP (n~132)	SAT (n~124)	IMP (n~161)	SAT (n~154)	IMP (n~186)	SAT (n~176)
Providing and maintaining roads and footpaths	96%	29%	100%	25%	86%	27%	97%	28%	99%	29%	96%	29%	97%	26%
Providing and maintaining parks, gardens, reserves and playgrounds	75%	68%	88%	55%	83%	57%	95%	59%	93%	69%	88%	62%	90%	64%
Provision and management of traffic and parking in the area	80%	32%	83%	31%	81%	39%	93%	24%	89%	36%	84%	33%	89%	33%
Recreation opportunities such as sporting facilities, walking trails and bike paths	91%	55%	87%	40%	88%	54%	84%	53%	72%	67%	80%	54%	83%	58%
Preserving and promoting local heritage (includes built, natural and Indigenous	73%	50%	74%	51%	71%	45%	88%	40%	80%	48%	70%	44%	86%	49%
Planning and building services (includes application and subdivision)	39%	33%	56%	39%	67%	44%	79%	22%	69%	26%	68%	30%	63%	31%

Q1a - In relation to planning and infrastructure services provided by Council, how important is each service to you (using the scale 1 = Not important to 5 = Very Important) and how satisfied are you with each service (using the scale 1 = Very dissatisfied to 5 = Very satisfied)
Don't know response excluded. Prefer not to say response excluded from Age.

Satisfaction with waste management recycling and services increased by 5%.

Providing waste management and recycling services, along with coastal protection and environmental management activities, remained somewhat more important than pest and animal management.

Satisfaction with coastal protection and environmental initiatives decreased by 6% (attributed to a 6% increase in dissatisfaction) in 2023.



Q1b - On a scale of 1 = Not important to 5 = Very Important and 1 = Very dissatisfied to 5 = Very satisfied, how important and how satisfied are you with the following in relation to Council environmental services?
Don't know response excluded

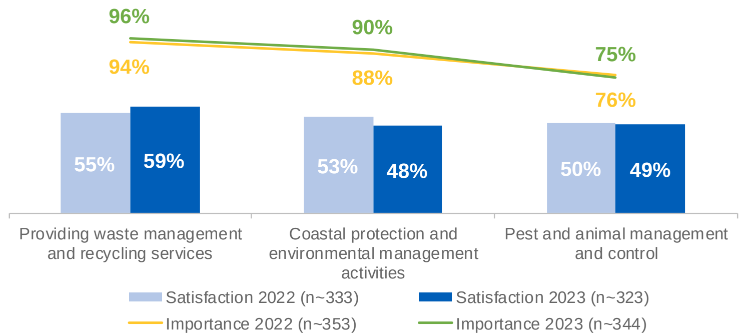
Importance of environmental services remained relatively consistent over time amongst resident and business' surveys.

Satisfaction with waste management and recycling services increased in 2023 for both the resident (up 4% from 2022) and business (up 7% from 2022) samples, a positive result given the high level of importance placed on this particular service and noting the changes to the summer collection schedule that were introduced in December 2022/January 2023.

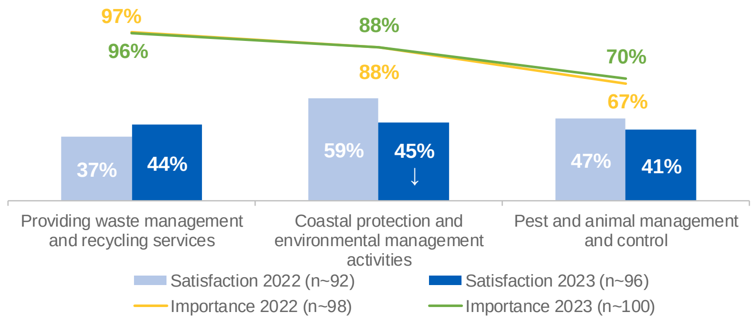
Satisfaction with costal protection and environmental management services decreased amongst residents and received the lowest satisfaction rating of the three environmental services. There was also a noticeable drop in satisfaction for these services within the business sample, with satisfaction dropping by 14% (attributed to an increased proportion of neutral responses, rather than a large increase in dissatisfaction).

Importance of environmental services for non-resident ratepayers surveyed shifted to similar ratings seen by residents and businesses. Non-resident ratepayers were also more satisfied on environmental service aspects compared to the other cohorts and to 2022 results.

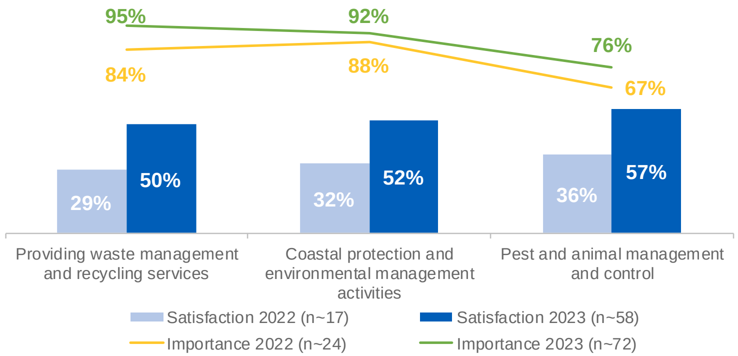
Importance vs satisfaction – Council environmental services
Resident sample (% rating 4-5)



Business sample (% rating 4-5)



Non-resident ratepayer sample (% rating 4-5)



Q1b - On a scale of 1 = Not important to 5 = Very Important and 1 = Very dissatisfied to 5 = Very satisfied, how important and how satisfied are you with the following in relation to Council environmental services?
Small sample sizes apply, Don't know response excluded

The 60-69 age cohort placed a significantly higher level of importance on pest and animal management control (88%) compared to just 59% of 18 to 34 year olds stating this environmental service was important. The remaining two environmental services varied minimally amongst age groups in terms of importance rating.

In regards to satisfaction, the 70+ demographic were significantly more satisfied with all three environmental services, with the 35 to 49, and 50 to 59 age groups significantly less satisfied on waste management and recycling services (although this had increased from satisfaction ratings in 2022). The 18 to 34 age group was significantly less satisfied on coastal protection with just 26% satisfied (compared to 53% in 2022).

Females continued to place a higher level of importance on each environmental aspect than males (statistically significant for costal protection and environmental management), however, were slightly less satisfied on the three environmental service aspects.

Importance vs satisfaction – Environmental services in 2023

(Resident sample)

	18 to 34		35 to 49		50 to 59		60 to 69		70+		Male		Female	
	IMP (n~43)	SAT (n~41)	IMP (n~51)	SAT (n~48)	IMP (n~46)	SAT (n~42)	IMP (n~74)	SAT (n~68)	IMP (n~130)	SAT (n~122)	IMP (n~159)	SAT (n~147)	IMP (n~183)	SAT (n~174)
Providing waste management and recycling services	93%	53%	94%	45%	100%	45%	97%	50%	95%	77%	96%	61%	96%	58%
Coastal protection and environmental management activities	93%	26%	90%	55%	90%	44%	93%	37%	87%	60%	86%	50%	93%	47%
Pest and animal management and control	59%	41%	71%	39%	66%	43%	88%	39%	78%	64%	73%	51%	77%	49%

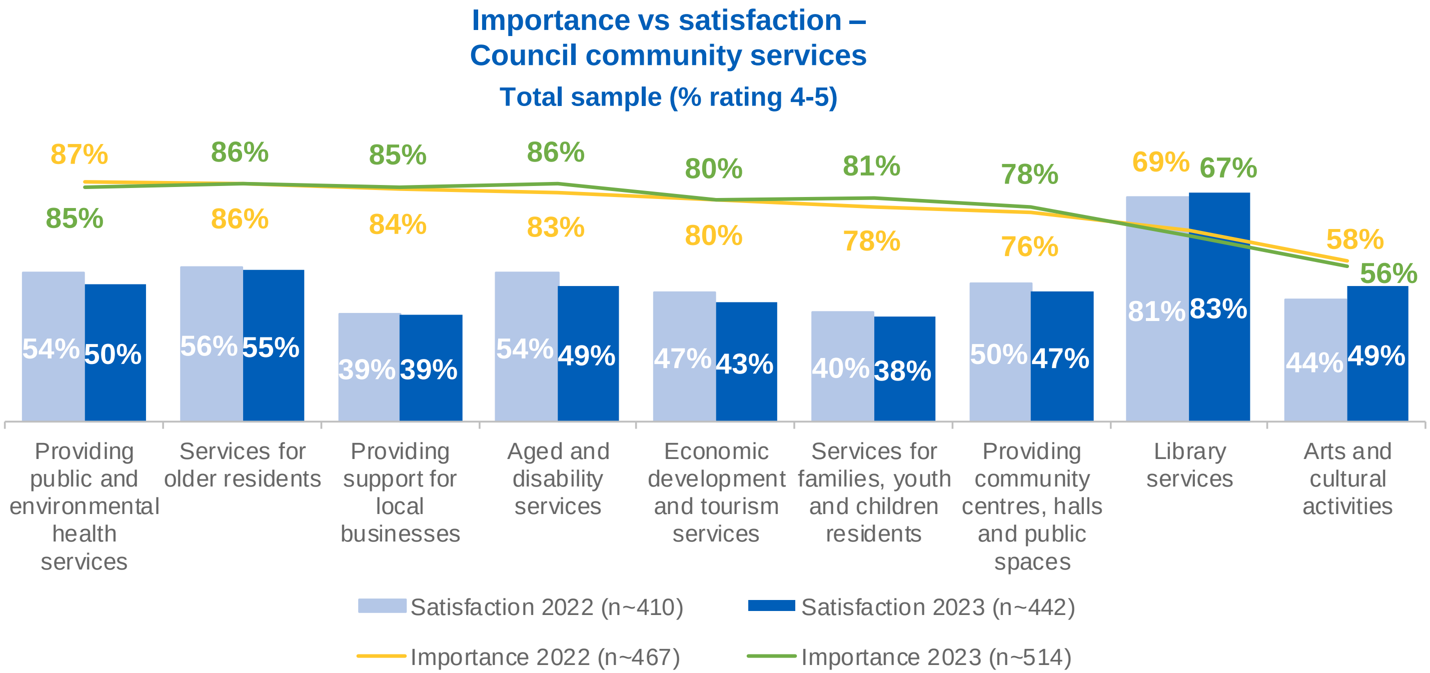
Q1b - On a scale of 1 = Not important to 5 = Very Important and 1 = Very dissatisfied to 5 = Very satisfied, how important and how satisfied are you with the following in relation to Council environmental services?

The community perceived 'services for older residents' and 'aged and disability specific services' most important in 2023.

Importance remained relatively consistent with levels achieved in 2022, with slightly greater importance placed on aged and disability services and services for families, youth and children residents.

While Library services continue to excel (increase in satisfaction in 2023), gaps between importance and satisfaction for Council community services remain.

While not statistically significant, largest decreases in satisfaction were recorded for aged and disability services as well as for economic development and tourism services. The community were least satisfied with services for families. Satisfaction with arts and cultural activities increased by 5%, however remains the least important community service tested.



Q1c - On a scale of 1 = Not important to 5 = Very Important and 1 = Very dissatisfied to 5 = Very satisfied, how important and how satisfied are you with the following in relation to Council community services?

Residents regarded aged and disability services and services for older residents as the most important community services in 2023, whereas, not surprisingly, businesses stated that providing support for local businesses was most important.

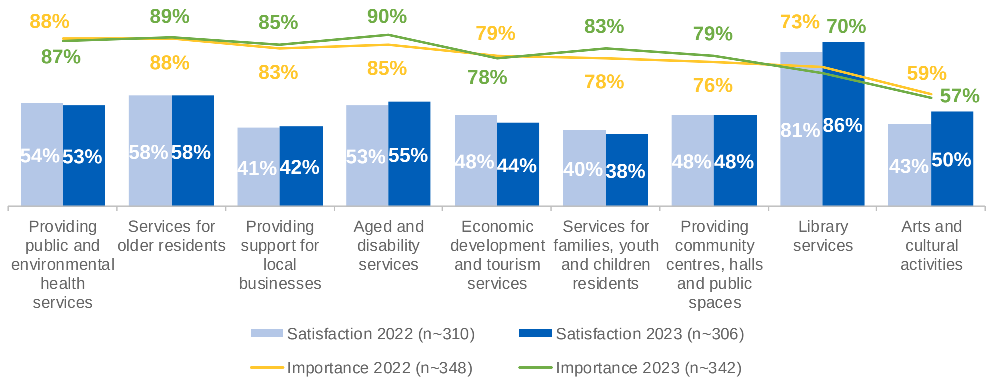
Resident satisfaction on community services remained reasonably consistent with levels recorded in 2022. Largest increases on satisfaction were recorded for library services (up 5%) and arts and cultural activities (up 7%).

Business satisfaction, however, recorded decreases on all community service measures, with just 1 in 4 stating they were satisfied with the support provided for local business. A significant decrease in satisfaction was also regarded for aged and disability services (a decrease of 29% from 2022) and providing community centres, halls and public spaces (a decrease of 18%).

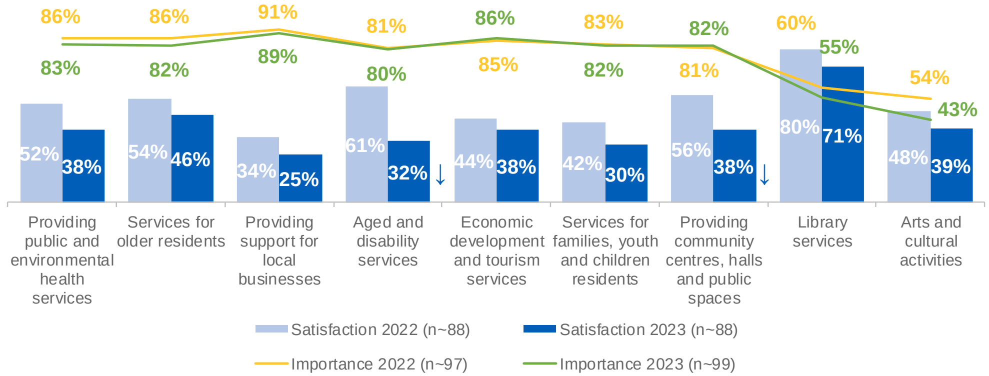
While importance and satisfaction ratings did increase, more than 1 in 3 non-resident ratepayers often provided "don't know" responses on Council community service satisfaction metrics, which suggests a lack of familiarity and awareness. Satisfaction ratings for most aspects were also higher than levels seen for residents and businesses in the area, in particular services for families, youth and children residents (57% satisfied vs 38% for residents and 30% for business).

Importance vs satisfaction – Council community services

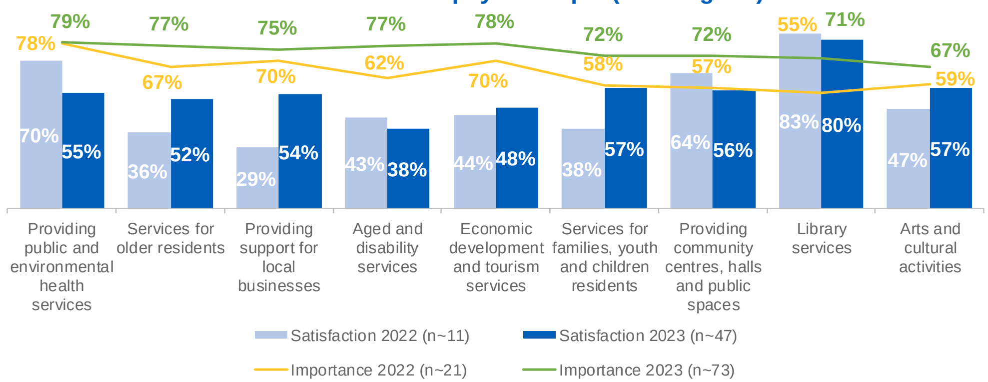
Resident sample (% rating 4-5)



Business sample (% rating 4-5)



Non-resident ratepayer sample (% rating 4-5)



Q1c - On a scale of 1 = Not important to 5 = Very Important and 1 = Very dissatisfied to 5 = Very satisfied, how important and how satisfied are you with the following in relation to Council environmental services?
Small sample sizes apply, Don't know response excluded.

As per 2022, the 18 to 34 and 35 to 49 demographics surveyed placed lesser importance on community services. Unsurprisingly, 93% of the youngest age cohort said services for families, youth and children were the most important community services.

In terms of satisfaction, the highest endorsement tended to be by the oldest 70+ age group (significantly so for five community service measures) and the lowest satisfaction by the 60 to 69 cohort (who placed significantly higher levels of importance on most community metrics). Considering lower levels of satisfaction, it will be important to understand more about the service needs for this age cohort.

Females tended to place somewhat greater importance on each of the service aspects over males, significantly so for providing public and environmental health services, aged and disability services and library services.

Library services continue to meet the needs of the community, with satisfaction higher than stated importance across all age groups and both gender cohorts.

	18 to 34		35 to 49		50 to 59		60 to 69		70+		Male		Female	
	IMP (n~43)	SAT (n~40)	IMP (n~52)	SAT (n~47)	IMP (n~44)	SAT (n~40)	IMP (n~73)	SAT (n~64)	IMP (n~129)	SAT (n~114)	IMP (n~158)	SAT (n~140)	IMP (n~182)	SAT (n~164)
Providing public and environmental health services	88%	43%	79%	46%	78%	46%	95%	40%	89%	71%	83%	56%	91%	51%
Services for older residents	80%	62%	75%	58%	87%	49%	98%	48%	93%	65%	88%	61%	91%	55%
Providing support for local businesses	84%	41%	79%	29%	89%	30%	93%	31%	82%	57%	83%	37%	87%	47%
Aged and disability services	81%	61%	83%	56%	90%	46%	97%	40%	91%	65%	85%	60%	93%	52%
Economic development and tourism services	62%	60%	77%	41%	79%	42%	89%	33%	78%	47%	79%	39%	77%	49%
Services for families, youth and children residents	93%	32%	92%	38%	84%	26%	83%	35%	74%	49%	79%	40%	87%	37%
Providing community centres, halls and public spaces	64%	45%	87%	45%	80%	42%	86%	45%	77%	55%	77%	48%	81%	49%
Library services	43%	85%	72%	90%	65%	78%	71%	89%	78%	86%	60%	82%	78%	90%
Arts and cultural activities	51%	54%	53%	50%	50%	56%	53%	49%	66%	48%	51%	41%	62%	57%

Q1c - On a scale of 1 = Not important to 5 = Very Important and 1 = Very dissatisfied to 5 = Very satisfied, how important and how satisfied are you with the following in relation to Council environmental services?

Importance vs satisfaction regarding Council services

The below visualises the **importance and satisfaction** for each Council service captured in the survey at the total sample level. Several services (bottom right quadrant) have above average importance and below average satisfaction and should be key priority areas going forward. The upper right quadrant (higher importance, higher satisfaction) should likely have a maintenance-focused strategy. Those with lower importance/lower satisfaction (bottom left quadrant) whilst they may not be of higher importance and satisfaction across the population, they would still be important to certain communities and as such may need more focused engagement. The upper left quadrant highlights the high level of satisfaction the library service currently has. **Council may wish to consider the below when planning future engagement with the community.**

- Planning and infrastructure
- Environmental service
- Community services

*Please refer to legend on next page for number reference to labels

Importance vs satisfaction regarding Council services label legend

Service Type	Service	Reference code
Planning and Infrastructure services	Providing and maintaining roads and footpaths	1
	Recreation opportunities such as sporting facilities, walking trails and bike paths	2
	Providing and maintaining parks, gardens, reserves and playgrounds	3
	Planning and building services (includes application and subdivision)	4
	Preserving and promoting local heritage (includes built, natural and Indigenous)	5
	Provision and management of traffic and parking in the area	6
Environmental services	Providing waste management and recycling services	7
	Coastal protection and environmental management activities	8
	Pest and animal management and control	9
Community services	Providing support for local businesses	10
	Arts and cultural activities	11
	Services for older residents	12
	Services for families, youth and children residents	13
	Aged and disability services	14
	Library services	15
	Economic development and tourism services	16
	Providing public and environmental health services	17
	Providing community centres, halls and public spaces	18

COUNCIL COMMUNICATIONS

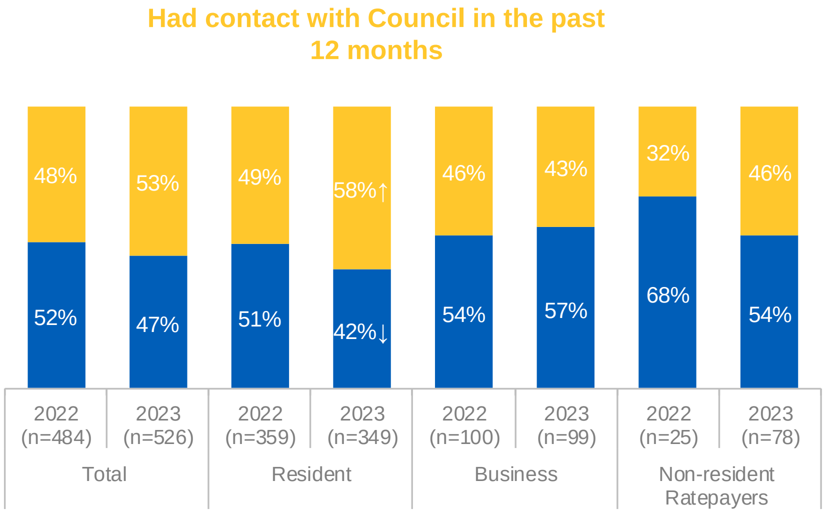
Section 2

**note resident data shown in this section is from sample collected via CATI and social media only*

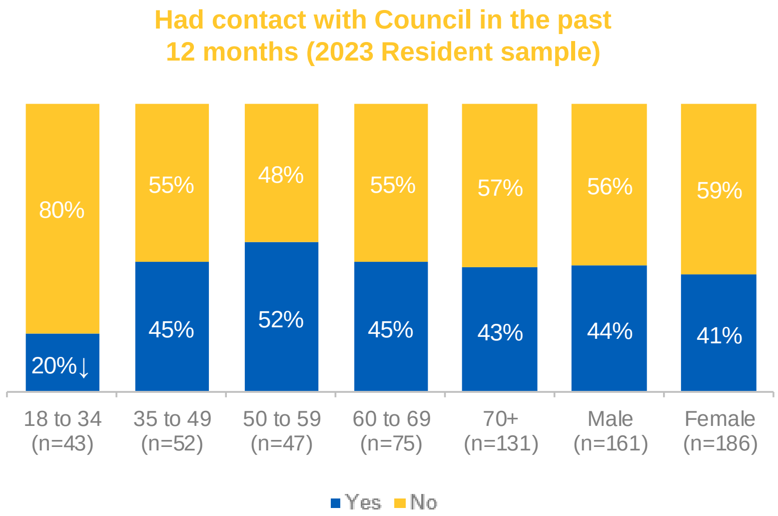
In 2023, contact with Council in the last 12 months has decreased by 5%, more so for local residents.

Level of contact amongst businesses increased in 2023, while resident contact levels decreased by 9%.

While the incidence of contact was much higher for non-resident ratepayers, compared to residents in 2023, their level of contact has decreased by 14% in 2023.



The 50 to 59 demographic had the highest incidence of contact (52%) in the past 12 months (whereas the 35 to 49 age bracket had the highest incidence in 2022). The 18 to 34 age bracket continues to have the lowest (just 20% - notably lower than other age groups).



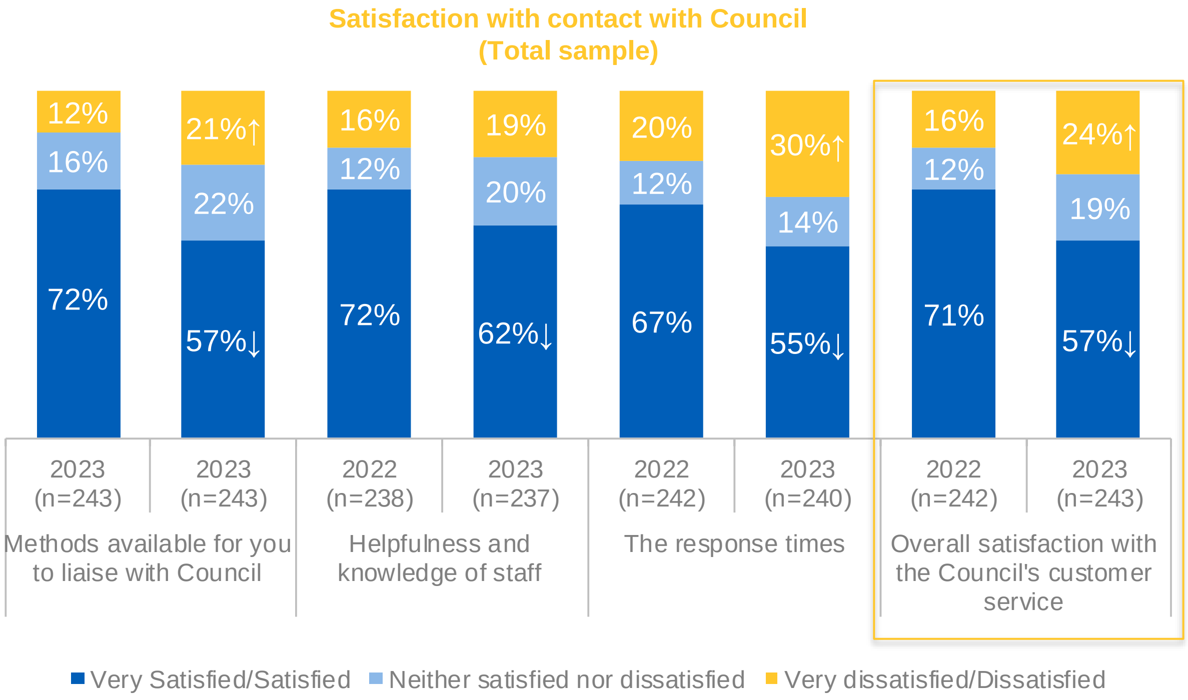
Q2 - Have you contacted the Council for any reason by any means within the last 12 months?

Overall satisfaction with Council's customer service among those who had contact has decreased statistically significantly to 57% in 2023.

Satisfaction for methods available to liaise with Council, helpfulness and knowledge of staff and response times, also decreased statistically significantly in comparison to 2022. Satisfaction with methods available for community members to liaise decreased by 15%.

Decreases in satisfaction with helpfulness and knowledge of staff, along with responses, are in line with the changes made to Council's customer service charter which saw increases in timeframes for responses to the community in response to resourcing challenges.

Differences were driven by both resident and business respondents (see over page for further details).



Of note, 1 in 4 were dissatisfied with the service provided overall

(1 in 6 in 2022)

Q4 - Overall, thinking about your contact with Council in the past 12 months and using a scale 1 = very dissatisfied to 5 = very satisfied, how satisfied were you with…?

Q4 only asked of those who said they had contacted Council by any means in the last 12 months

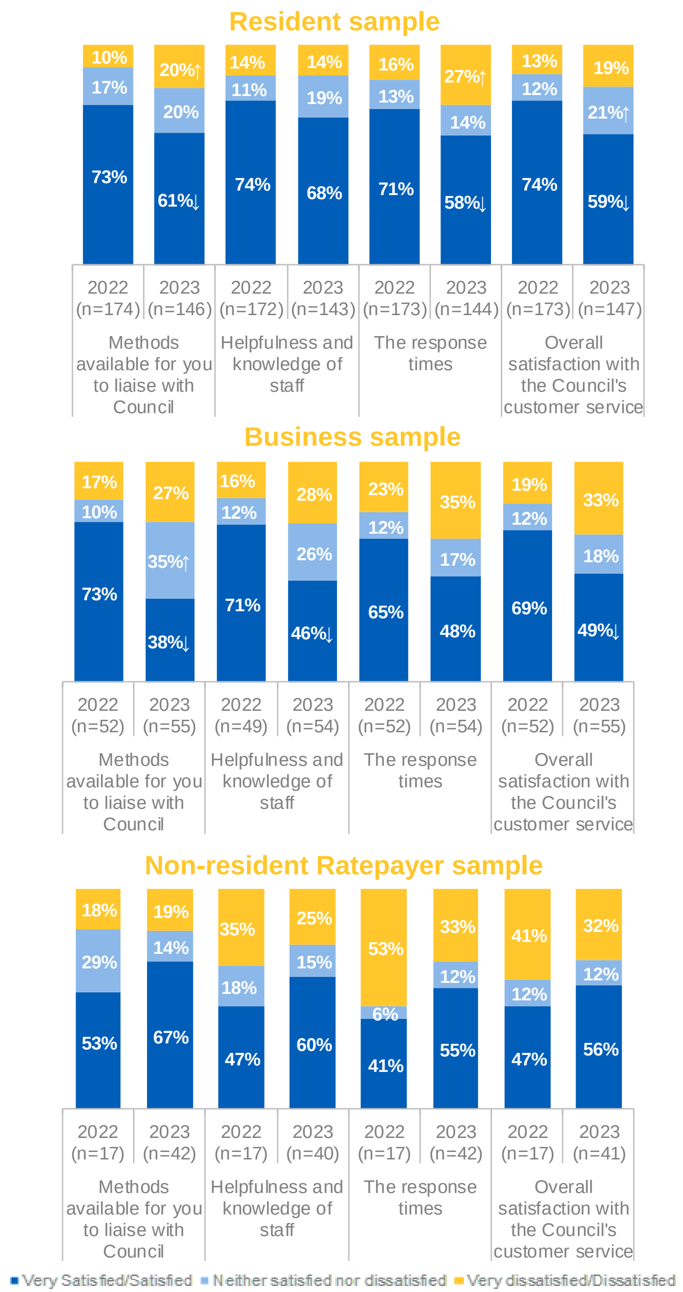
Changes in the community's customer service experience align with challenges faced by the organisation over the ensuing 12 months. During this time changes were made to the Council's customer service charter allowing longer time frames for responses. This has likely influenced 2023 survey results.
Customer service journey could be an area of further investigation amongst the community, in particular, consideration of an extension of methods to liaise with Council, increasing knowledge levels of contact topics and ensuring response time is efficient.

Overall, all contact metrics with Council decreased in 2023. Significant decreases were recorded in satisfaction amongst the resident sample who had contact with Council for overall satisfaction with customer service, methods available and response times. There was a notable increase in dissatisfaction (up 11%) with response times within the resident sample.

Businesses sampled recorded a greater shift in satisfaction for customer service aspects, with overall satisfaction in customer service decreasing by 20%. Satisfaction with customer service metrics also recorded significant decreases, including a 35% decrease in satisfaction with methods available to liaise with Council and a 25% decrease in satisfaction with helpfulness and knowledge of staff. Just over 1 in 3 were dissatisfied with response times.

Improvements were seen for satisfaction with Council's customer service amongst non-resident ratepayers to more moderate levels and to higher satisfaction levels in comparison to the residents and business sample.

Satisfaction with contact with Council



Q4 - Overall, thinking about your contact with Council in the past 12 months and using a scale 1 = very dissatisfied to 5 = very satisfied, how satisfied were you with…?
Q4 only asked of those who said they had contacted Council by any means in the last 12 months
Small sample sizes apply

Amongst residents, overall satisfaction with Council customer service was significantly higher for those community members aged 70 years and older. This demographic was also seen to be more satisfied for other communication aspects related to Council customer service, which is consistent with 2022. While low sample numbers, younger aged residents recorded lower levels of satisfaction with customer service-related contact.

Over time, differences in female satisfaction with Council customer service varied significantly for 3 of 4 customer service metrics in 2023:

- Methods available for you to liaise with Council – 60% in 2023 vs 74% in 2022.
- The response times – 59% in 2023 vs 74% in 2022.
- Overall satisfaction with Council customer service – 57% in 2023 vs 76% in 2022.

Satisfaction with contact with Council in 2023 amongst residents (% very satisfied / satisfied)

	18 to 34 (n=8)	35 to 49 (n=23)	50 to 59 (n~24)	60 to 69 (n=33)	70+ (n~56)	Male (n~69)	Female (n~75)
Methods available for you to liaise with Council	13%	38%	59%	69%	73%	62%	60%
Helpfulness and knowledge of staff	50%	50%	71%	65%	79%	67%	69%
The response times	13%	46%	62%	58%	70%	58%	59%
Overall satisfaction with the Council's customer service	13%	50%	55%	58%	74%	62%	57%

Q4 - Overall, thinking about your contact with Council in the past 12 months and using a scale 1 = very dissatisfied to 5 = very satisfied, how satisfied were you with…?
Q4 only asked of those who said they had contacted Council by any means in the last 12 months
Small sample sizes apply,
Don't know response excluded

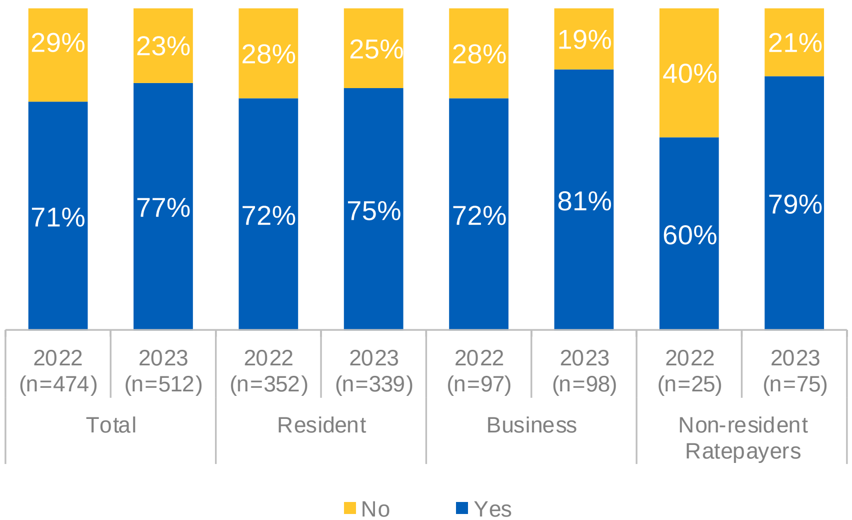
Approximately 3 in 4 recall Council related information in 2023, a 6% increase.

While residents recorded a slight increase in recall levels, business and non-resident ratepayers increased to 8 in 10 recalling communications (60% for non-resident ratepayers in 2022), suggesting an increased level of engagement with Council in 2023.

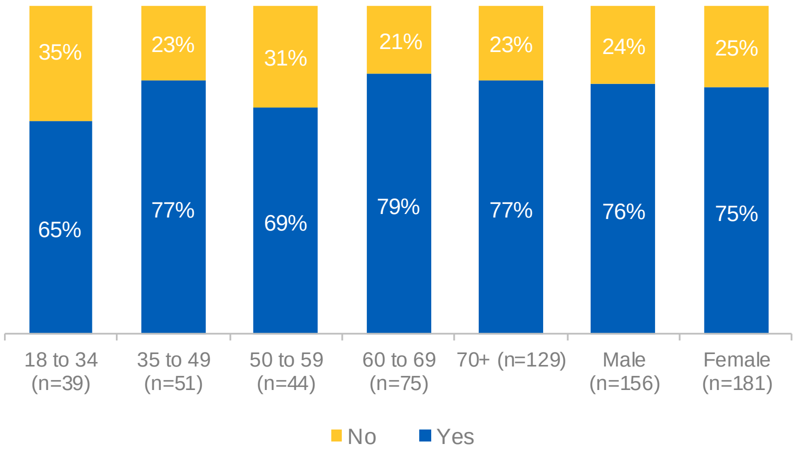
Levels of communication recall were highest for older residents (with the exception of the 35 to 49 age group, which increased from 65% to 77% recall in 2023).

Males and females had similar levels of reach (approximately 3 in 4), however in comparison to 2022, male recall of Council related information increased from 68% to 76%, suggesting a heightened level of engagement amongst males.

Recall Council related information

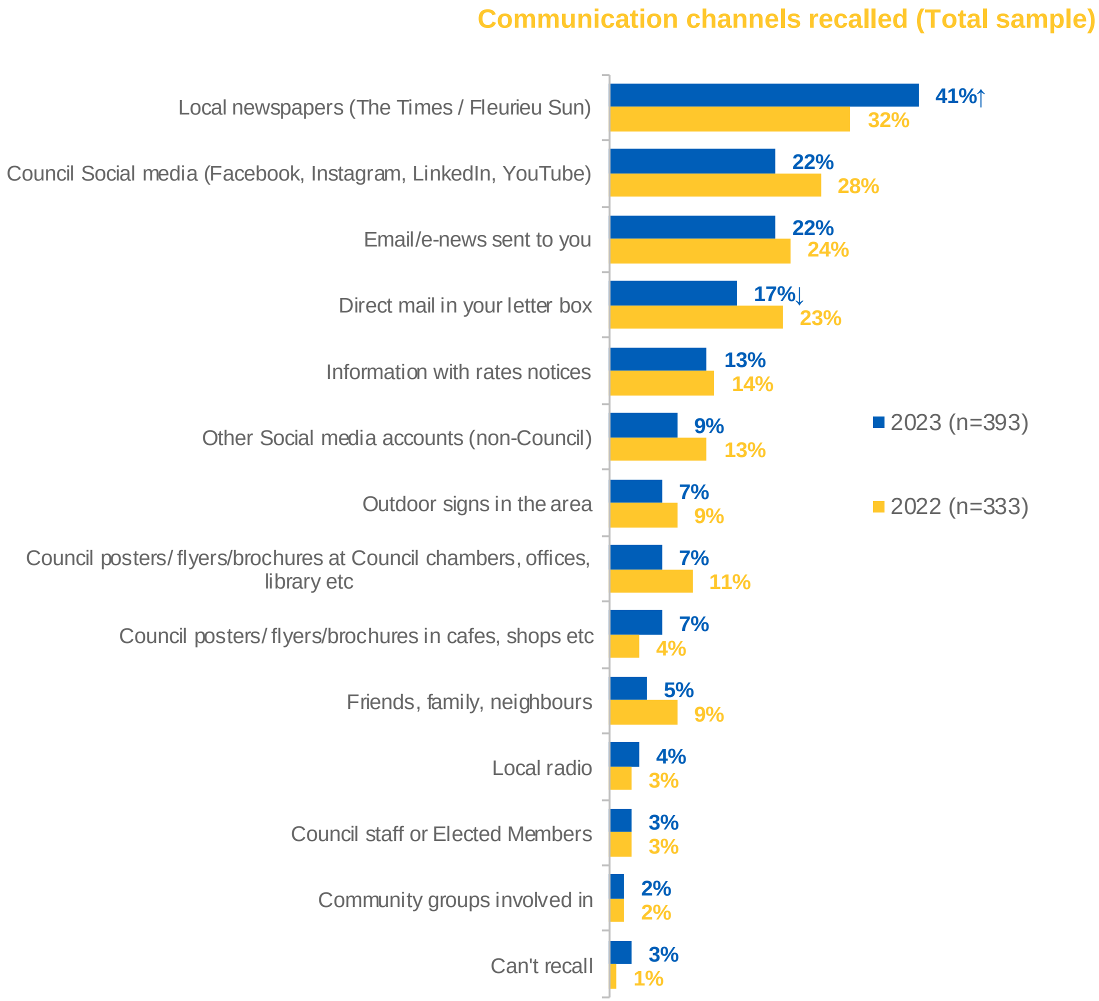


Recall Council related information (Resident sample)



Q5 - Do you recall receiving, seeing, reading, or hearing ANY information about Council activities, projects, services or events through any means in the past 12 months?
Small sample size apply

Direct communications through local newspapers (significant increase), email and through Council social media remain the most recalled communication channels.



Information recalled via direct mail in the letter box decreased significantly in comparison to 2022. All other sources of information remained relatively consistent.

Interestingly, the local newspapers' (The Times / Fleurieu Sun) significant increase was driven by 48% of residents recalling Council information (see over the page) through local newspapers and 31% of non-resident ratepayers. Business to a lesser extent (25%) recalled information via local newspapers.

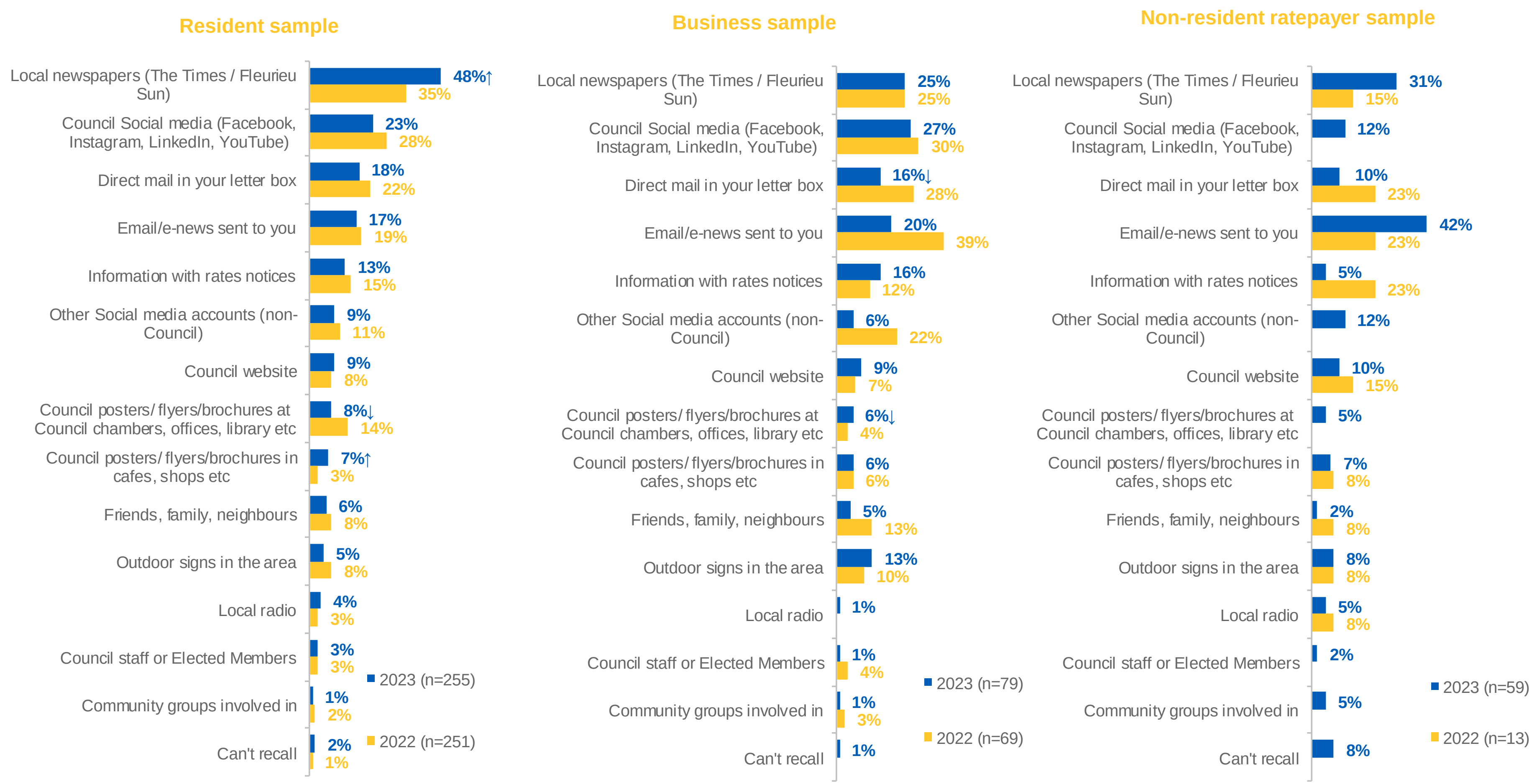
Just 20% of the business sample recalled information via email, a significant decrease of 19% compared to 2022 and to a similar proportion of residents (19%). 42% of non-resident ratepayers recall information via email.

While not significant, a decrease in recall was stated for information direct in the letter box (larger decreases for businesses compared to residents)

Q6 - Where do you recall seeing, reading, or hearing information about Council activities, projects, services or events in the past 12 months? (Select all that apply).
Q6 – Only asked of those who recall seeing, reading or hearing information about Council in the past 12 months

Businesses continue to appear more digitally-inclined in their recall than residents, however, to a lesser extent than 2022. Both the resident and business community would stand to benefit from greater awareness and receipt via email contact and / or direct paper mail.

Methods of receiving / recalling information about Council



Q6 - Where do you recall seeing, reading, or hearing information about Council activities, projects, services or events in the past 12 months? (Select all that apply).
Q6 – Only asked of those who recall seeing, reading or hearing information about Council in the past 12 months
Small sample size apply

Interestingly, in 2023 the primary source of information on Council for all age groups was through local newspapers, significantly higher for those aged 50-59 (48% vs 25% in 2022), and while not statistically significant, 46% of those aged 18 to 34 received information via this method (compared to 14% in 2022). Comparing against age cohorts, those 70+ continue to be significantly more likely to recall information via the local newspaper. While Council social media also remains a source of information for the younger age groups, this has decreased significantly for 35 to 49 year olds, with just 27% recalling information via Council's social media compared to 63% in 2022.

Females were significantly more likely to recall information via local newspapers compared to 2022. While males had a larger recall of information through local newspapers, this decreased compared to 2022.

Methods of receiving / recalling information about Council in 2023 (Resident sample)

	18 to 34 (n=25)	35 to 49 (n=39)	50 to 59 (n=30)	60 to 69 (n=59)	70+ (n=100)	Male (n=119)	Female (n=135)
Council website	8%	5%	4%	17%	8%	12%	6%
Council Social media (Facebook, Instagram, LinkedIn, YouTube)	42%	27%	22%	24%	16%	15%	30%
Other Social media accounts (non-Council)	15%	15%	7%	11%	5%	8%	11%
Local newspaper (The Times)	46%	42%	48%	33%	58%	42%	53%
Local radio	-	5%	-	4%	5%	3%	4%
Direct mail in your letter box	27%	10%	11%	22%	19%	18%	18%
Information with rates notices	-	12%	15%	15%	15%	15%	12%
Email/e-news sent to you	8%	23%	19%	22%	15%	20%	15%
Outdoor signs in the area	15%	7%	7%	4%	2%	6%	4%
Council posters/ flyers/brochures at Council chambers, offices, library etc	-	5%	4%	13%	9%	10%	6%
Council posters/ flyers/brochures in cafes, shops etc	4%	7%	11%	9%	4%	4%	9%
Council staff or Elected Members	8%	2%	-	-	5%	5%	1%
Community groups involved in	-	3%	-	2%	1%	1%	2%
Friends, family, neighbours	4%	7%	7%	2%	7%	5%	6%
Can't recall	4%	5%	4%	-	1%	2%	2%

Q6 - Where do you recall seeing, reading, or hearing information about Council activities, projects, services or events in the past 12 months? (Select all that apply).
Q6 – Only asked of those who recall seeing, reading or hearing information about Council in the past 12 months
Small sample size apply

COUNCIL CORPORATE PERFORMANCE

Section 3

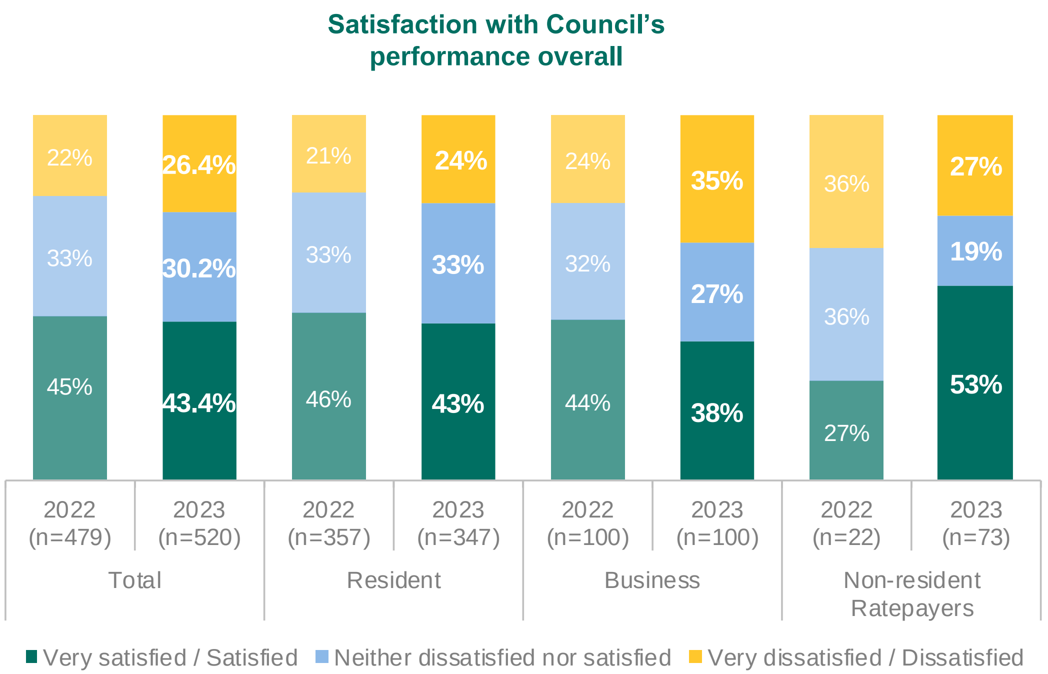
**note resident data shown in this section is from sample collected via CATI and social media only*

Satisfaction with Council's performance remained moderate at 43% in 2023, with just over 1 in 4 dissatisfied.

Resident satisfaction remained comparable to 2022, recording a 3% shift from satisfaction to dissatisfaction.

Businesses recorded a larger change in satisfaction, with just over 1 in 3 dissatisfied with Council's overall performance, attributed to decreases in satisfaction and neutral satisfaction ratings. The larger decrease in business satisfaction is likely impacted by decreased satisfaction in general Council services and customer service, as seen earlier, as well as decreased satisfaction with Council performance metrics (see page 34 for further insight).

Non-resident rate payers were more decisive on their satisfaction of Council in 2023, with just over 1 in 2 non-resident ratepayers satisfied with Council overall.

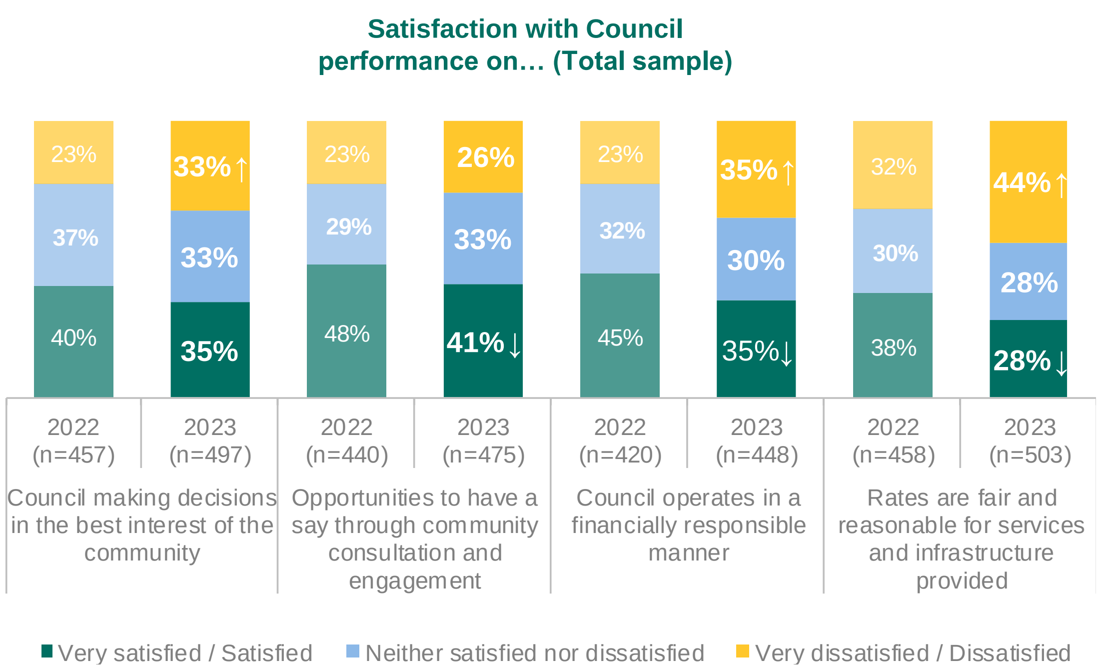


Q9 - And on the same scale of 1 to 5 where 1 = Very dissatisfied to 5 = Very satisfied, how satisfied are you with Council's performance overall?
Don't know response excluded

Significant decrease in satisfaction with 3 of 4 metrics used to measure Council performance in 2023.
(3 in 4 metrics recorded a significant increase in dissatisfaction)

Whilst a significant decrease in satisfaction, Council continues to be perceived to perform best on providing the community with opportunities to have their say, and least on the perception that rates are fair and reasonable for the services and infrastructure provided (12% increase in those dissatisfied to 44%). Just over 1 in 3 were satisfied with Council's financial management.

Opportunity exists to increase engagement with the community to provide assurance that Council is making decisions in the interest of the community while operating in a financially sustainable manner to deliver services and infrastructure.



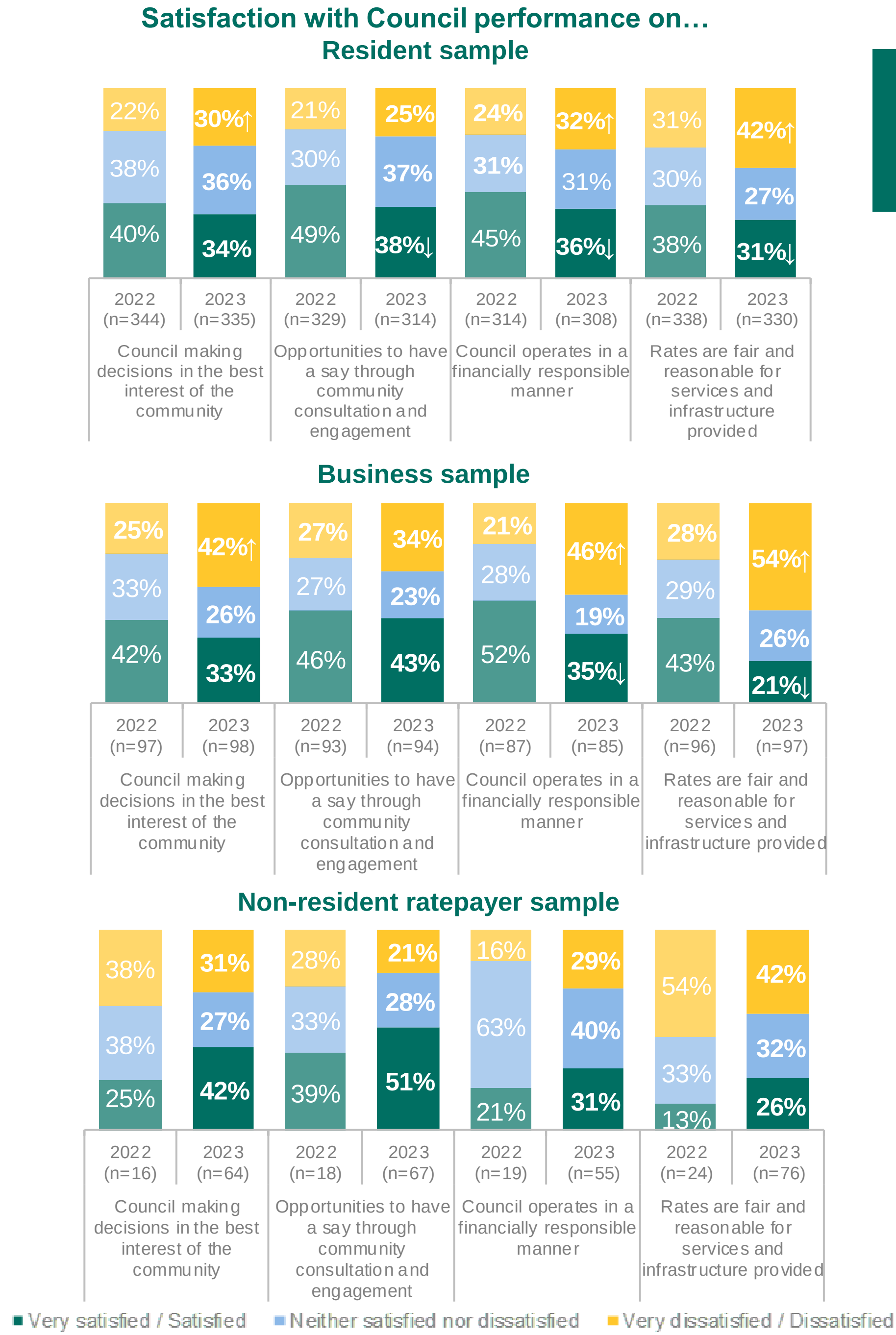
Q8 - On a scale of 1 to 5 where 1 = Very dissatisfied to 5 = Very satisfied, overall, how satisfied are you with the Council's performance in regard to:
Don't know response excluded

Resident and business satisfaction on Council performance aspects over time were comparable (with the exception of an 11% significant decrease in resident perceptions that they have opportunity to have their say).

Both resident and business samples recorded notable decreases in satisfaction and a significant increase in dissatisfaction with Council making decisions in the best interest of the community.

The business sample was most dissatisfied with the perception that rates are fair and reasonable, just 21% satisfied and 54% dissatisfied on Council's performance in this regard.

While levels of satisfaction increased for non-resident ratepayers to moderate levels for decision making in the best interest of the community and opportunities to have their say, there is still a lower level of dissatisfaction on the perception of operating in a financially sustainable manner and that rates are fair and reasonable compared to other sample groups.



Q8 - On a scale of 1 to 5 where 1 = Very dissatisfied to 5 = Very satisfied, overall, how satisfied are you with the Council's performance in regard to:
Don't know response excluded
Small sample sizes apply

Residents aged 70+ were most satisfied overall with Council performance and remain stable at 52% (same in 2022). While other age groups were relatively similar in satisfaction, the 60 to 69 year old cohort were most critical of Council performance. It is important to note satisfaction on Council performance increased by 9% in 2023 for the 50 to 59 age bracket.

Satisfaction with Council's performance overall in 2023 (Resident sample)

	18 to 34 (n=43)	35 to 49 (n=51)	50 to 59 (n=46)	60 to 69 (n=73)	70+ (n=132)	Male (n=158)	Female (n=187)
% Very satisfied / Satisfied	41%	37%	39%	35%	52%	46%	41%

Similar to overall satisfaction, and other trends seen through the report, satisfaction for specific performance metrics were highest amongst 70+ year olds.

Gender differences were notable in 2023, with females appearing to be more critical on Council performance than males. Lower on all measures (significantly for rates being fair and reasonable – 24% vs 40%).

Over time females rated significantly less on 3 of 4 measures compared to 2022.

Satisfaction with Council performance in 2023… (Resident sample)

	18 to 34 (n~42)	35 to 49 (n~47)	50 to 59 (n~42)	60 to 69 (n~68)	70+ (n~121)	Male (n~146)	Female (n~173)
Council making decisions in the best interest of the community	27%	31%	38%	29%	38%	37%	31%
Opportunities to have a say through community consultation and engagement	32%	29%	29%	41%	47%	39%	38%
Council operates in a financially responsible manner	42%	23%	31%	30%	45%	41%	33%
Rates are fair and reasonable for services and infrastructure provided	26%	23%	20%	28%	42%	40%	24%

Q8 - On a scale of 1 to 5 where 1 = Very dissatisfied to 5 = Very satisfied, overall, how satisfied are you with the Council's performance in regard to:
Q9 - And on the same scale of 1 to 5 where 1 = Very dissatisfied to 5 = Very satisfied, how satisfied are you with Council's performance overall?
Don't know response excluded

Majority of suggested improvement areas continue to relate to civil planning

- including improvement to roads, street scaping and management of land (development) in the area.

Other suggested areas in 2023 for improvement included:

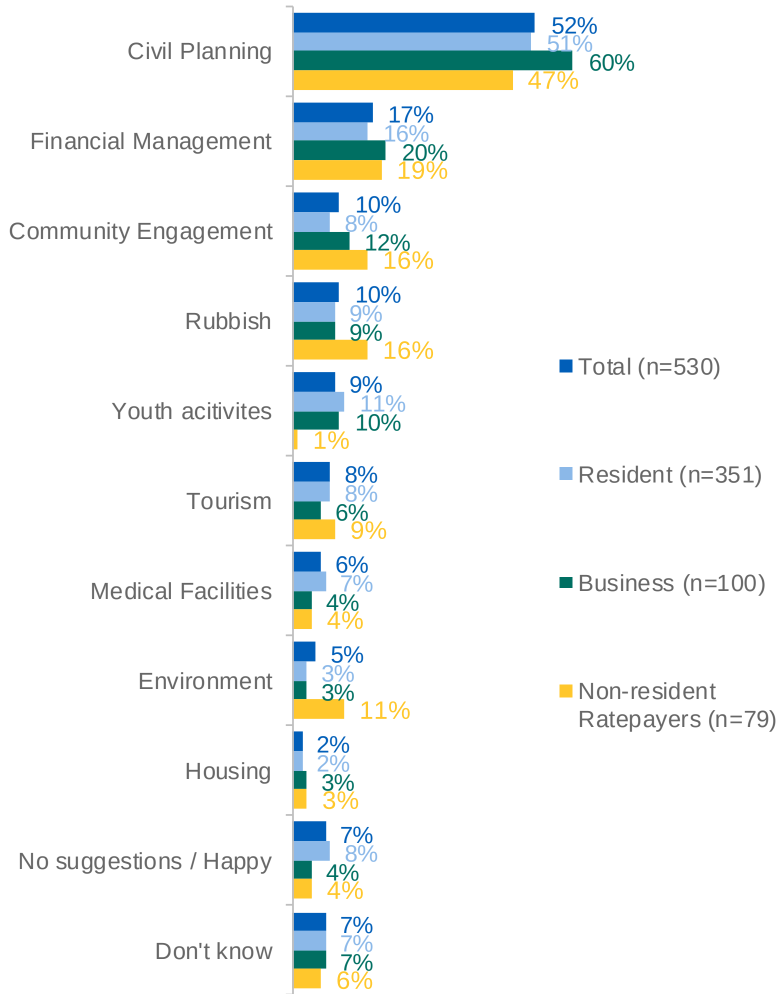
- Financial management (more efficiency with finances)
- Community engagement (increase engagement with the community through more planning meetings)
- Rubbish management (Collection frequency, hard waste collection, and better waste management)

While relatively consistent with suggested areas for improvement, businesses had greater emphasis on civil planning (28% stating repair roads, 14% improved street scaping) and financial management. This aligns with this cohort's lower satisfaction ratings relating to infrastructure services and Council acting in a financially responsible manner.

Non-resident ratepayers' focus was around civil planning (including significantly higher on traffic management and management of land), financial management and to a larger degree than residents and businesses, community engagement and waste management. 11% also had a focus on environmental factors and interest in maintaining the local biodiversity of the area, which are all aspects which would impact their investment.

Suggested Improvement Areas in 2023 – Themes

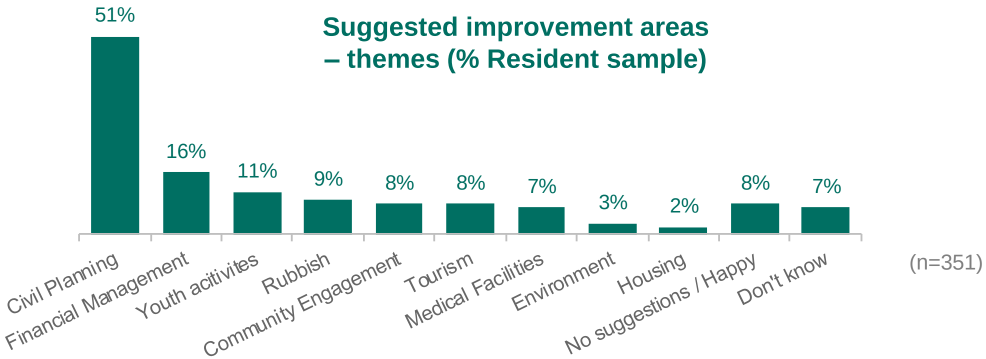
(Total sample)



Q10 - Overall, what are the main areas you believe Council needs to focus on to improve the Victor Harbor area or how Council performs?
Responses 2% or less excluded from Themes Breakdown table

Suggested improvement areas (% breakdown by themes)		Total (n=530)	Resident (n=351)	Business (n=100)	Non-resident Ratepayers (n=79)
Civil Planning	Repair roads	17%	16%	28%	8%
	Improve parking in all areas (specifically main street)	9%	10%	9%	5%
	Better traffic management (through better road planning/structure)	8%	7%	6%	14%
	Better management of land (development and infrastructure)	8%	5%	13%	15%
	Improve/add footpaths	8%	9%	5%	8%
	Improve street scaping	7%	5%	14%	5%
	More infrastructure for families with children	5%	5%	8%	-
Financial Management	Be more efficient with financial spending	7%	7%	6%	6%
	Improve council rates	5%	3%	8%	10%
	Support/inquire into the local business community sector	4%	3%	5%	4%
Community Engagement	Increase engagement with community (more planning meetings)	7%	7%	9%	6%
Rubbish	Weekly collection instead of fortnightly	4%	3%	3%	10%
	Better waste management (recycling)	4%	3%	4%	8%
	Add hard rubbish collection (1-2 times a year)	3%	4%	2%	3%
Environment	Maintain local biodiveristy (climate change)	3%	2%	1%	10%
Youth activities	Increase activities for youth (they have nothing to do)	7%	9%	8%	-
	Nil/Happy	7%	8%	4%	4%
	Don't know	7%	7%	7%	6%

Q10 - Overall, what are the main areas you believe Council needs to focus on to improve the Victor Harbor area or how Council performs?
Responses 2% or less for total sample excluded from Themes Breakdown table



Suggested improvement areas (% breakdown by themes - Residents)

Theme	Suggestion	18 to 34 (n=44)	35 to 49 (n=51)	50 to 59 (n=47)	60 - 69 (n=75)	70+ (n=133)	Male (n=161)	Female (n=188)
Civil Planning	Better traffic management (through better road planning/structure)	11%	8%	5%	3%	7%	9%	5%
	Repair roads	16%	17%	17%	10%	18%	17%	15%
	Better management of land (development and infrastructure)	2%	4%	2%	3%	9%	5%	5%
	Better bus/public transport service (in VH as well as to/from Adelaide)	4%	2%	2%	7%	2%	2%	4%
	Improve parking in all areas (specifically main street)	-	12%	5%	12%	13%	11%	9%
	Improve/add footpaths	4%	10%	7%	9%	11%	4%	13%
	Improve street scaping	2%	4%	12%	2%	7%	5%	6%
	More infrastructure for families with children	16%	10%	10%	2%	1%	6%	4%
Financial Management	Be more efficient with financial spending	4%	4%	7%	16%	5%	9%	6%
	Communicate with rate payers on financial matters for better understanding	7%	6%	-	3%	1%	1%	3%
	Support/inquire into the local business community sector	4%	4%	2%	7%	1%	3%	3%
	Improve council rates	-	-	7%	5%	3%	5%	2%
Youth activities	Increase activities for youth (they have nothing to do)	18%	13%	19%	3%	3%	9%	9%
Rubbish	Weekly collection instead of fortnightly	2%	10%	2%	3%	1%	2%	4%
	Add hard rubbish collection (1-2 times a year)	2%	2%	-	5%	5%	2%	5%
	Better waste management (recycling)	-	6%	5%	3%	2%	2%	4%
Community Engagement	Increase engagement with community (more planning meetings)	-	6%	5%	9%	10%	5%	9%
Medical Facilities	Need more disability access points for building and disability services in general	2%	2%	-	3%	5%	1%	5%
	Nil/Happy	4%	6%	7%	9%	11%	10%	6%
	Don't know	7%	6%	7%	5%	8%	7%	6%

Q10 - Overall, what are the main areas you believe Council needs to focus on to improve the Victor Harbor area or how Council performs?
Responses 2% or less excluded based on total resident sample

COUNCIL FOCUS AREAS

Section 4

**note resident data shown in this section is from sample collected via CATI and social media only*

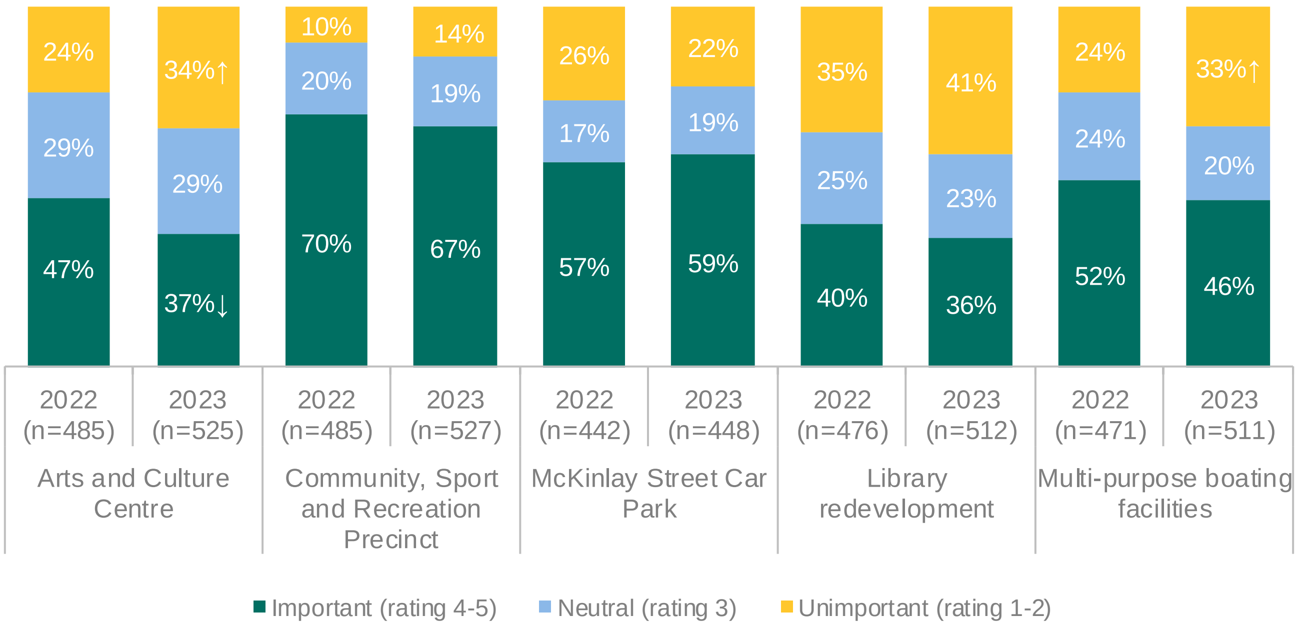
The Regional Community, Sport and Recreation Precinct remains the community's top major project priority.

The McKinlay Street Car Park development is also perceived as important (slightly increasing in importance levels compared to 2022). There was a statistically significant increase in the unimportance rating for a multi-purpose boating facility, suggesting this development area is of less importance to the community in 2023.

The overall community view on an Arts and Culture Centre also shifted somewhat, with a significantly lower proportion indicating importance (37%), resulting in this project not being as high a priority as other development areas.

Given the lower continued perception of importance and high level of satisfaction (noted in the 2022 and 2023 surveys), the library redevelopment again was regarded as the least necessary area to redevelop.

Importance of Council development areas (Total Sample)



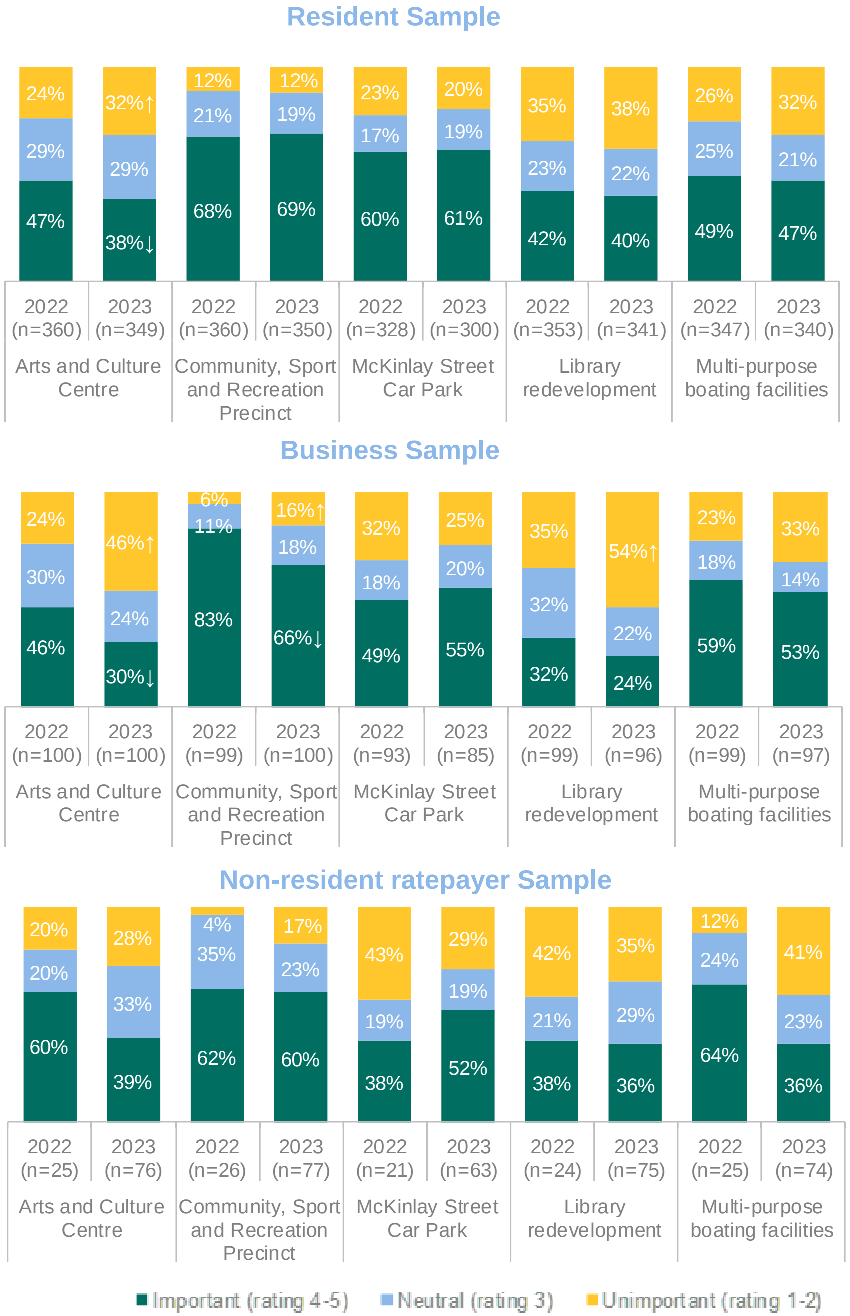
Q11 - On a scale of 1 to 5 where 1 = Not at all important to 5 = Very important, how important to you are each of the following projects for Council to develop…
Don't know response excluded
Q11a – And which is MOST important to you? (Asked of those who provided a rating of 4-5 for each development area)

Residents, whilst still placing the highest importance on the community sport and recreation precinct, continued to show demand for the McKinlay Street Car Park. Residents deemed an Arts and Culture Centre significantly less important in 2023, slightly less important than a library redevelopment.

Interestingly, businesses experienced a higher level of fluctuation in what they believed important as a development area. While still the most important area, a significant decrease was seen for a Community, Sport and Recreation Precinct. Similar to residents, the business sample showed a significant decrease in the importance of the Arts and Culture Centre (almost 1 in 2 rated as an unimportant area of development). McKinlay Street Car Park and a Multi-purpose boating facility had similar levels of importance.

Non-resident ratepayers placed highest importance on the Community, Sport and Recreation Precinct and McKinlay Street Car Park. Multi-purpose boating facilities was deemed the least important development area by this cohort.

Importance of Council development areas

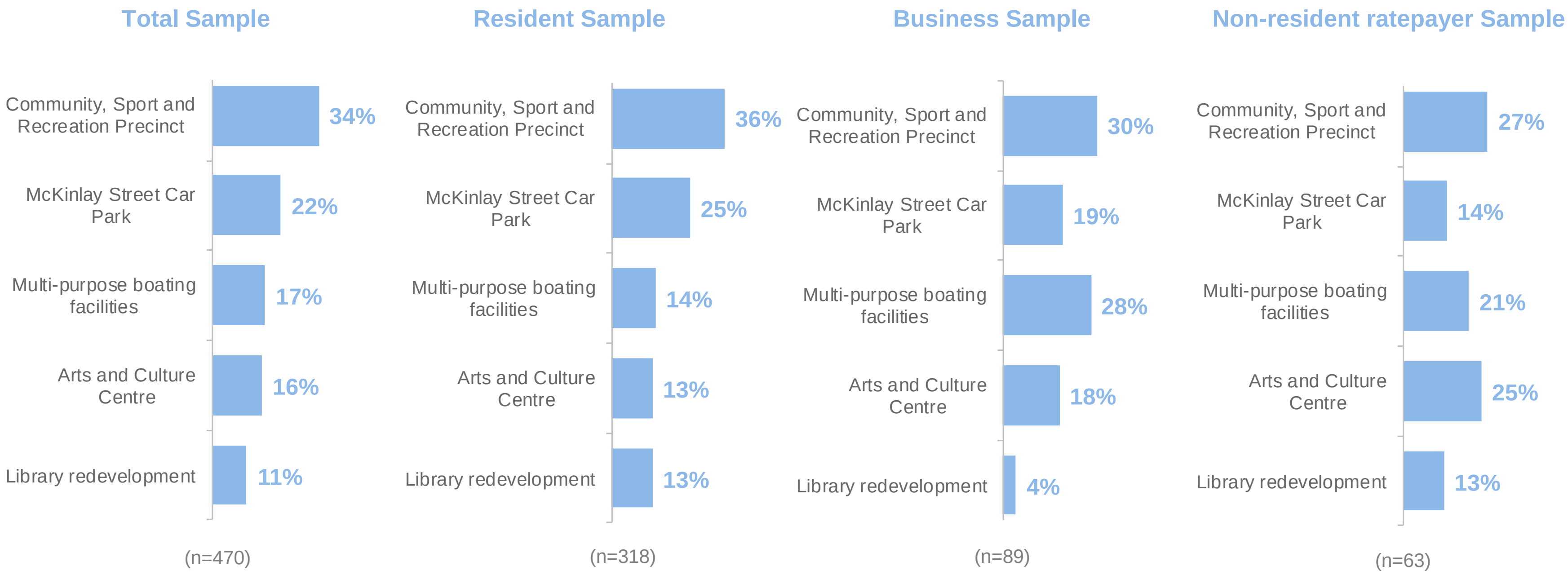


Q11 - On a scale of 1 to 5 where 1 = Not at all important to 5 = Very important, how important to you are each of the following projects for Council to develop…
Q11a – And which is MOST important to you?
Small sample sizes apply

As seen in 2022, the Community, Sport and Recreation Precinct was deemed the most important area of development for a project in the Council area amongst all cohorts (when forced to only choose one option), which increased significantly for residents (36% in 2023 vs 29% in 2022).

While not the overall first choice, businesses also placed importance on a multi-purpose boating facility (which would attract visitors into the area to utilise the boating facilities).

Most important Council development area – Forced choice preference



Q11 - On a scale of 1 to 5 where 1 = Not at all important to 5 = Very important, how important to you are each of the following projects for Council to develop…
Q11a – And which is MOST important to you?

The 70+ demographic placed a significantly higher level of importance on a library redevelopment compared to younger aged cohorts.

In comparison to 2022, 18-34 year olds deemed the Arts and Culture Centre significantly less important (29% in 2023 vs 54% in 2022) and was the lowest promoter of this development area compared to other ages.

Female residents placed significantly higher importance on McKinlay Street Car Cark, the Library Redevelopment and the Arts and Culture Centre, whereas males were more likely to favour multi-purpose boating facilities.

While females placed a higher proportion of importance on the Arts and Culture Centre, when comparing to 2022, they were significantly more likely to state this development area as unimportant (25% in 2023 vs 16% in 2022).

When forced to choose just one of the five possible development projects, the Regional Community, Sport and Recreation Precinct was most-often nominated. However the 60 to 69 and 70+ demographics shared equal importance on The Precinct and with McKinlay Street Car Park, 30% and 28% respectively.

Female perception was that a Community, Sport and Recreation Precinct was most important, increasing significantly in 2023 (40% in 2023 vs 29% in 2022).

Importance of Council development areas in 2023
(% importance (rating 4-5) - Resident sample)

	18 to 34 (n~44)	35 to 49 (n~51)	50 to 59 (n~47)	60 to 69 (n~73)	70+ (n~133)	Male (n~160)	Female (n~188)
Community, Sport and Recreation Precinct	71%	73%	67%	67%	68%	65%	71%
McKinlay Street Car Park	59%	64%	51%	70%	60%	55%	66%
Multi-purpose boating facilities	36%	50%	60%	56%	39%	50%	44%
Library redevelopment	32%	28%	31%	44%	48%	32%	46%
Arts and Culture Centre	29%	35%	36%	40%	44%	30%	46%

Most important area to develop in 2023
(Resident sample) Forced choice preference

	18 to 34 (n~40)	35 to 49 (n~48)	50 to 59 (n~40)	60 to 69 (n~68)	70+ (n~120)	Male (n~143)	Female (n~173)
Community, Sport and Recreation Precinct	54%	43%	42%	30%	28%	31%	40%
McKinlay Street Car Park	15%	18%	22%	30%	28%	29%	21%
Multi-purpose boating facilities	17%	16%	17%	15%	9%	19%	9%
Arts and Culture Centre	7%	20%	11%	11%	14%	11%	15%
Library redevelopment	7%	2%	8%	13%	20%	11%	15%

Q11 - On a scale of 1 to 5 where 1 = Not at all important to 5 = Very important, how important to you are each of the following projects for Council to develop…
Q11a – And which is MOST important to you?

DEMOGRAPHICS

Section 5

**note resident data shown in this section is from sample collected via CATI and social media only*

Demographics

Property Ownership Town/Suburb	Total (n=452)	Resident (n=352)	Business (n=100)	Non-resident ratepayer (n=0)
Back Valley	1%	1%	2%	-
Encounter Bay	29%	32%	19%	-
Hayborough	12%	13%	7%	-
Hindmarsh Tiers	1%	1%	-	-
Hindmarsh Valley	5%	3%	11%	-
Lower Inman Valley	6%	5%	9%	-
McCracken	11%	12%	9%	-
Mount Jagged	1%	1%	1%	-
Victor Harbor	30%	29%	37%	-
Waitpinga	4%	4%	5%	-

Age Group	Total (n=530)	Resident* (n=350)	Business (n=99)	Non-resident ratepayer (n=81)
18 to 34	9%	12%	6%	-
35 to 49	19%	15%	32%	19%
50 to 59	16%	13%	24%	17%
60 - 69	26%	21%	29%	44%
70+	30%	38%	8%	20%

Gender	Total (n=529)	Resident* (n=350)	Business (n=100)	Non-resident ratepayer (n=79)
Male	50%	46%	63%	52%
Female	50%	54%	37%	48%

QS4, QS5, QS7
*Resident data is weighted
Prefer not to say responses not included

THANK YOU

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