Business Survey
Market Research Report 2021

City of Norwood Payneham & St Peters

11 February 2022

Intuito
MARKET RESEARCH

Contents

1. Introduction

Intuito is delighted to present the findings of a business community survey to the City of Norwood Payneham & St Peters.

Council conducts a business survey every two years to establish how the Council is performing on a number of key indicators and has done so since 2009 with this being the fifth survey in the series (noting that the survey was not undertaken in 2015). Intuito conducted the business fieldwork for this project between 1 November and 30 November, 2021. A total of 200 businesses were surveyed with representation from across most of the main business districts within the Council area (i.e. Norwood Parade, Magill Road, Kensington Road, Fullarton Road, etc.). Approximately half of the surveys were conducted online and half were face to face.

Interviewers went business-to-business in these precincts asking for the manager or equivalent to complete the survey.

Only businesses operating in the City of Norwood Payneham & St Peters Council area completed this survey. If the respondent didn't have a business in this area they were thanked and disqualified from completing the survey.

A survey of 601 Norwood, Payneham & St Peters residents was also conducted simultaneously and the results are presented in a separate report.

2. Brief and background

Project background and general information

The Council's Strategic Management Plan, *CityPlan 2030: Shaping Our Future*, commits the Council to monitoring and reporting on the Council's progress in achieving the various outcomes and objectives contained in the Plan. The Community Survey, undertaken by the Council every two (2) years, provides valuable data to assist in this task. It also enables changes in community satisfaction levels to be compared over time.

CityPlan 2030 is updated every four (4) years with the update occurring in 2020 as a Mid Term Review. *CityPlan* continues to have four (4) outcome areas: Social Equity, Cultural Vitality, Economic Prosperity and Environmental Sustainability. Based on community feedback received as part of the Mid Term Review consultation process, minor amendments were made relating to sustainable transport, traffic management, stormwater management and sustainability.

The reporting framework was also amended as part of the Mid Term Review, with the view to simplifying the reporting approach. Metrics, measurement and targets are now arranged within Macro Targets, Council Targets and Community Targets. The Community Targets relate specifically to information obtained through the Community Surveys.

When *CityPlan 2030* was first developed in 2007, extensive community consultation was undertaken to determine the community's aspirations and priorities for a preferred future. Further feedback has been sought through each subsequent review.

In consideration of this, the Community Survey did not seek feedback about what respondents like or dislike about the area or broad directions for the future. However, a question relating to key priority issues was seen as appropriate in order to monitor changes in community priorities. Given the disrupting impacts of Covid-19 over the past 18 months, a few additional questions were asked relating to the pandemic.

Community surveys have been conducted in 2009, 2011, 2013, 2017 and 2019 and now in 2021.

It was the aim of this study to survey a minimum of 200 businesses operating in the Council area. To enable comparisons to previous surveys, the questionnaire contained the same demographic information and many of the same questions.

3. Research objectives, methodology and interpretation

Purpose of the research

To explore and measure the business community satisfaction, performance ratings, and importance of key areas across a range of Council services and facilities.

Specific research objectives

- To measure overall satisfaction with the Council and the services it provides
- To measure the importance of Council's services to the community
- Determine if respondents use specific services, which they have rated, and if not, why not
- To collect data which tracks progress in achieving the *CityPlan 2030* targets, and
- Monitor change in business community perceptions over time.

Methodology

The survey was undertaken in two parts, the residential component and the business component.

- The resident survey was conducted face-to-face with randomly selected residents within the Council area at centrally located shopping centres, libraries and then supplemented with door to door for representation across Council wards.
- The business survey was conducted face-to-face and online (emailing a business list supplied by the Council). The main business areas within the Council area were targeted for the face-to-face intercepts and in some instances business emails were captured and an invitation sent later to complete the survey online if they were unavailable to do so in person.

The following show the number of surveys completed and the method in which they were conducted.

	Residents	**Businesses**
Sample achieved	601	200
	601 face-to-face	98 online/102 face-to-face
Distribution of survey	Intuito	Intuito
Av. questionnaire length	21 minutes	16 minutes
Margin of error	3.9% at a confidence level of 95%	7.9% at a confidence level of 95%
Collection dates	1 November-1 December 2021	1 November-25 November 2021

Sampling and Statistical Validity

Statistical accuracy is a function of the sample size. The larger the sample size, the greater the statistical accuracy of the results.

Sampling tolerance

To assist in the interpretation of the survey data, the chart below shows the approximate plus or minus sampling tolerances for which allowance should be made. It should be remembered that all data based on sample surveys are subject to a sampling tolerance, that is, where a sample is used to represent an entire population, the resulting figures should be not regarded as absolute values, but rather as the mid-point of a range plus or minus a percentage as the tables below show. So, if you require a robust sample size, a sample of 600 provides a maximum 2-4% margin of error.

	MARGIN OF ERROR TABLE (95% confidence level) (Percentages giving a particular answer)									
SAMPLE SIZE	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%
50	6	9	10	11	12	13	14	14	14	14
100	4	6	7	8	9	9	10	10	10	10
150	4	5	6	7	7	8	8	8	8	8
200	3	4	5	6	6	6	7	7	7	7
250	3	4	5	5	6	6	6	6	6	6
300	3	4	4	5	5	5	6	6	6	6
400	2	3	4	4	4	5	5	5	5	5
500	2	3	3	4	4	4	4	4	4	4
600	2	2	3	3	4	4	4	4	4	4
700	2	2	3	3	3	3	4	4	4	4
800	2	2	3	3	3	3	3	3	3	4
900	1	2	2	3	3	3	3	3	3	3
1000	1	2	2	3	3	3	3	3	3	3

SOURCE: MARKET RESEARCH SOCIETY OF AUSTRALIA 1986

Representative Sample

The aim on the 2021 survey was to maintain consistency with the previous samples with a representative ward distribution as well as age and gender. The resident sample achieved was largely representative of the South Australian population in age and gender (not exact but representative). See the demographics for a breakdown in section 6.

The questionnaire

The survey questions remained predominantly consistent with previous surveys although there were some new questions relevant to the Council's response to COVID-19 and also responsiveness of staff and Elected Members. There was also a new question around environmental management.

The survey used a 5-point Likert scale to determine satisfaction (1 being very dissatisfied, 5 being very satisfied), and a 'don't know' response. The mean score is derived from this five-point satisfaction scale. Since the mid-point of the scale is 3, responses above 3.0 indicate higher satisfaction and responses below 3.0 indicate lower satisfaction.

A copy of the Business Questionnaire is contained in Chapter 8 of this report.

Analysis

Analysis was conducted to compare the following:

- Business responses in 2021 compared with 2019
- Analysis by ward to identify any similarities or differences
- Analysis against early surveys conducted in 2017, 2013, 2011 and 2009

Regression Analysis

Regression analysis has been used previously to identify attributes that have the most impact on overall satisfaction. A regression analysis is a statistical analysis that helps describe the relationship between variables, for example an independent variable (overall satisfaction) and a dependent variable (satisfaction) of sub attributes that affect overall satisfaction.

The figures on the regression analysis graph can be interpreted as below:
<0.2 – Weak impact
0.2-0.3 – Moderate impact
>0.3 – Strong impact

The regression analysis charts show orange bars and these indicate statistical significance. Grey bars, while they show some effect, are not statistically significant and should be viewed as indicative).

Report Notes
Throughout the report there may be very slight differences in numbers due to rounding up or down, which is why totals can sometimes be slightly less than 100% or slightly above 100%.

Statistical significance
Generally, and with a sample size of 200, statistical significance is a movement of plus or minus 3%. This means that some movements in percentage scoring (i.e. 4.1 to 4.2) are not statistically significant. Many of the minor movements in scoring is therefore not significant and more than likely a result of sampling. Trends, however, can be significant (i.e. 3.8 to 4.2 over an extended number of surveys).

Regression analysis and ranking of issues of importance
These are two different things. A regression analysis will show sub-categories that if manipulated (improved) will result in a better overall satisfaction score with Council. It should be noted that the significant sub-categories may not be significant issues of importance to businesses. For instance, providing and maintaining footpaths is a sub-category of infrastructure but this may not be an important sub-category of overall satisfaction.

The issues of importance to businesses are those that have been chosen and ranked (i.e. Q21 What in your opinion are the three major issues that Council should be addressing in the next three years?).

4. Summary of findings

The following chart shows the top scoring individual attributes (those scoring 3.8 or higher out of 5) taken from each of the categories that were the subject of this survey (i.e. infrastructure, waste & recycling services, quality of life, environmental management, economic development and leadership).

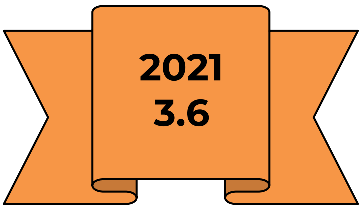
Top 10 areas of satisfaction

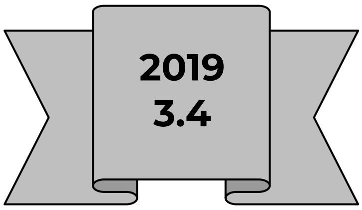
Feeling safe in the daytime	4.5
Weekly collection of business waste	4.3
Fortnightly collection of green organics	4.1
Fortnightly collection of recyclables	4.1
Access to services and facilities	4.0
Feeling safe at night	3.9
The presentation and cleanliness of the Council area	3.9
The level of community spirit	3.9
The ability to become involved in community life and activities	3.9
The amenity of our major commercial and retail areas	3.8

There were 34 measures across 6 performance areas (i.e. infrastructure, waste & recycling services, quality of life, environmental management, economic development and leadership) in the 2021 survey for businesses. Some key changes and results were as follows:

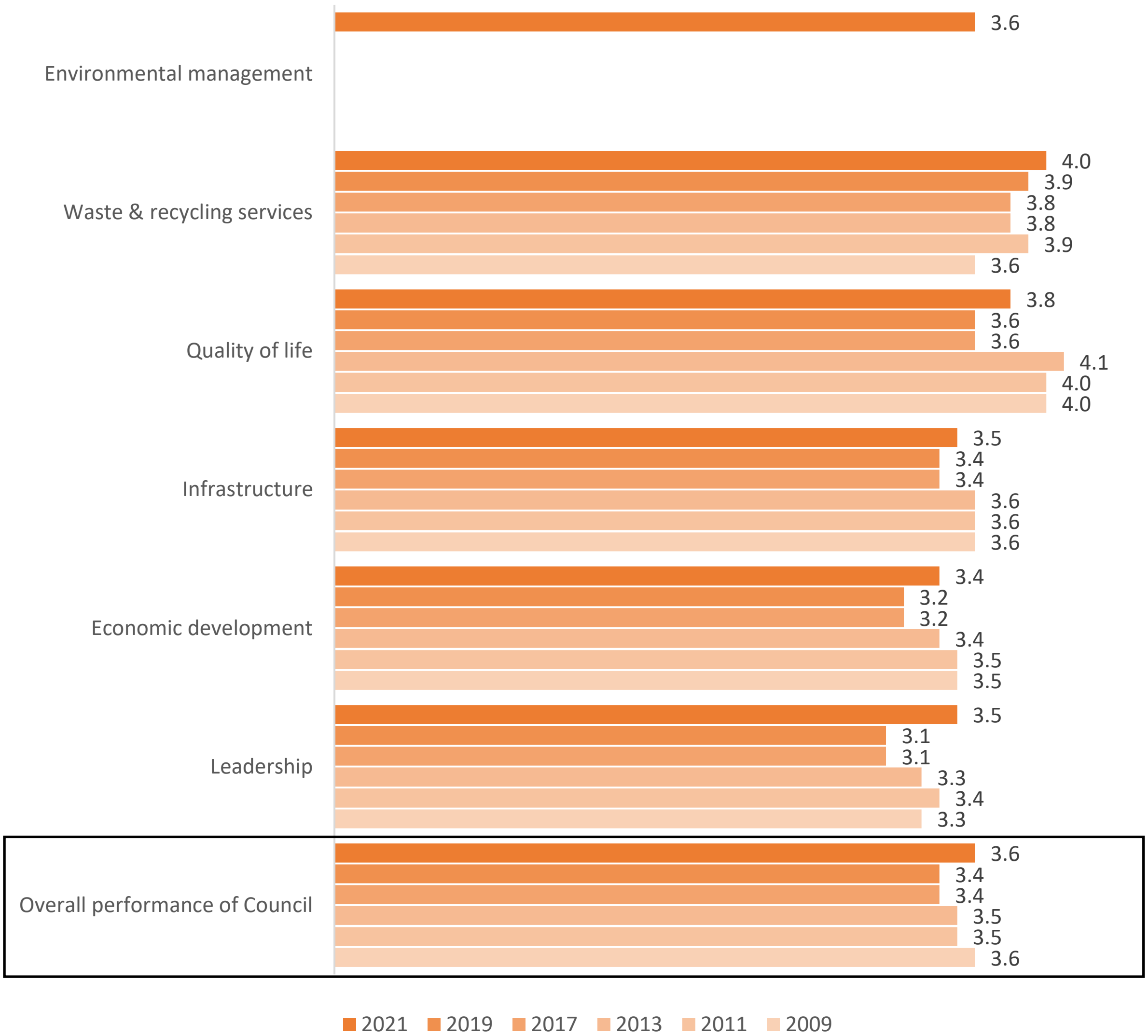
- 22 increased (0.3 or less)
- 6 increased (by more than 0.3)
- 2 saw no change
- 2 decreased (0.3 or less)
- 2 new measures added (environmental management)

The above shows a minor (but statistically significant) improvement in business satisfaction in 2021 compared to 2019.





Overall satisfaction, aggregated from each performance area (business) (Q2, 3, 4, 5, 6, 7)



*Please note that environmental management was new in 2021 so there are no other years recorded in the above chart.

Statistically significant increases can be seen in three of the above performance areas, namely leadership, economic development and quality of life and pleasingly, the increase in overall performance of Council is also statistically significant.

Overall satisfaction has increased across almost all attributes and businesses are generally feeling more confident toward the Council which is pleasing to see. We think the COVID measures that were put in place during the pandemic have improved business opinion.

The increases in overall satisfaction are all statistically significant particularly for satisfaction with Council leadership (up from 3.1 in 2019 to 3.5 in 2021). It is interesting to note, however, that business satisfaction is generally lower than that of resident satisfaction as the following chart shows:

2021 Comparison Resident vs Business satisfaction	Resident	Business
Waste & recycling services	4.3	4.0
Quality of Life	3.9	3.8
Infrastructure	3.9	3.5
Economic development	3.8	3.4
Leadership	3.7	3.5
Environmental management	3.8	3.6
Overall performance of Council	3.9	3.6

Performance areas – regression analysis

Based on the regression analysis conducted on each of the performance areas, these following are the top-scoring sub-areas. Improving in the following areas will have the great impact on overall satisfaction:

- Weekly collection of business waste
- The presentation and cleanliness of the Council area
- Attracting and supporting businesses
- The nature of new development within the Council area
- Providing leadership in the local community
- Keeping business informed about current issues

Perception statements (Q8/9)

All of the perception statements tested in 2021 scored higher or on par with 2019.

Businesses – perception statements	Change in score
The Council should facilitate a local economy supporting, and supported by, its community	=
The Council should promote the area as a centre for creative industries	=
The mix of businesses in the business precincts contributes to the prosperity of the area	↑
The Council provides sufficient opportunities for community engagement	↑
The Council area provides the opportunity for new enterprises and local employment	↑
I think the Council is supportive of local businesses & industries	↑
The Council provides convenient and accessible services for business	↑
There is a good communication between businesses and residents	↑
I am happy with the balance between Council rates and the services and standard of infrastructure provided*	↑

*Of those who rated this statement 1 or 2 out of 5, 49% said their preference is for maintaining the quality of services and the standard of infrastructure rather than keeping rates low, compared to 29% who think Council should keep rates as low as possible.

Preference between rates and services/infrastructure (Q10)
49% of all residents said they would prefer maintaining services and the standard of infrastructure compared to 29% who said they would prefer the Council to keep rates as low as possible.

Advantages of the area (Q11/12)

Only 45% of all businesses (down from 76% in 2019) think there are advantages to operating a business within the Council area. In order of priority the advantages are:

- Location good for customers

- Ideal location close to city
- Close to other businesses/facilities we use
- Council support and initiatives*
- Positive image as a shopping destination
- Good passing traffic

*New this year

The order of priority has changed in 2021 from 2019 with good passing traffic downgraded slightly to the lowest scored advantage possibly due to COVID. We also believe survey fatigue has affected respondents' willingness to highlight advantages and disadvantages.

Disadvantages of the area (Q14)
Only 25% of all businesses (down from 74% in 2019) think there are disadvantages. In order of priority the disadvantages are:

- Lack of parking/parking issues
- Issues with Council
- Issues with particular location/neighbours
- Issues with infrastructure
- Rates and rent too high
- Business/resident conflicting needs*
- Issues with Council*
- Issues with particular location/neighbours*
- Issues with infrastructure*

*The disadvantages cited this survey period are considerably different to 2019 with the addition of those marked with an asterisk featuring again for the first time since 2013.

Engaging with Council (Q15, 16, 17, 18)

- 24% of all businesses have interacted with an Elected Member compared to 69% with staff
- 20% can't recall if they've interacted with an Elected Member compared to 14% with staff
- 57% have never interacted with an Elected Member compared to 19% with staff.

There are higher levels of overall satisfaction with staff (3.8) than Elected Members (3.4) potentially because there are more interactions with staff.

Receiving information from Council (Q19)

Council's "YourBusiness" email is the most popular (61% and is new in 2021), followed by Council's website (39%) and social media pages (24%). Correspondingly, publications including LookEast and Council fliers/mailouts, etc. have dropped substantially in businesses preference to find out information although business appear to be keener on events (networking and community) in 2021 compared to 2019.

Involvement with Council-run events (Q20)

Business networking, Fashion on Parade, business workshops, Eastside Business Awards and Arts on Parade are the most popular events.

Issues of importance (Q21)

Car parking is the top issue (56%), followed by improving infrastructure (46%) and environmental sustainability (32%).

Engagement sessions with Council (Q22)

Only 17% of all businesses said they did not want to participate in engagement sessions (down from 35% in 2019).

Local business support of other local activities / organisations (Q23)

43% of businesses claim to support or sponsor a local activity or organisation.
Charities are the most popular followed by sporting clubs/groups and schools.

Awareness of economic development coordinators (Q24/25)

One in five businesses are aware of the coordinators with a quarter of these having interacted with them.

Business development (Q26/27)

Businesses' expectations are consistent with 2019 results:

- Look after the business needs / listen to them (64%)
- Promote businesses / the area (56%)
- Better / more car parking (46%)
- Maintain / provide good service (44.5%)

Types of businesses to attract (Q28)

Respondents called for the following types of businesses that should be attracted to the area:

- Retail (60%)
- Creative industries (45%)
- Hospitality (42%)
- Health (29%)

Response to COVID-19 (Q29)

The following Council responses were rated the most effective during COVID:

- JP services open throughout 3.7
- Increased cleaning in public areas 3.7
- Frozen Council rates 3.5

Final suggestions from respondents (Q30)

Respondents were asked to provide one suggestion or comment for the Council on how to improve its service delivery and the following topics were well represented:

- Better communication and consultation/responsiveness (77 responses)
- Traffic management and parking (21 responses)
- Development/planning aspects (16 responses)

CityPlan 2030 Outcomes

CityPlan 2030 (Mid-Term Review 2020) contains eight targets across four outcome areas that are tied to specific measures in the community survey. The results of the 2021 survey are assessed against the CityPlan targets in the following tables.

Social Equity

Metric	Target	2021 Results	Difference
Level of community satisfaction with safety during the day and night	Achieve a business rating higher than the average from the previous four surveys (>4.4 day) (>3.7 night)	Day 4.5 Night 3.9	.1 improvement .2 improvement
Level of community satisfaction with access to services and facilities	Achieve a business perception rating of higher than the average from the previous four surveys (>3.75)	4.0	.25 improvement

Cultural Vitality

Metric	Target	2021 Results	Difference
Level of community satisfaction with the nature of new development within the Council area	Achieve a business perception rating of higher than the average from the previous four surveys (>3.45)	3.6	.15 improvement

Economic Prosperity

Metric	Target	2021 Results	Difference
Level of community satisfaction with the Council's performance in attracting and supporting businesses	Achieve a business perception rating of higher than the average from the previous four surveys (>3.0)	3.3	0.3 improvement
Level of community satisfaction with the mix of businesses in the city's precincts contributes to the prosperity of the area.	Achieve a business perception rating higher than the average from the previous four surveys (>3.65)	3.8	0.15 improvement

Environmental sustainability

Metric	Target	2021 Results	Difference
Level of community satisfaction with the Council's response to climate change	N/A	3.4	First year we have measured this
Level of community satisfaction with the Council's management and use of water	N/A	3.7	First year we have measured this

5. Survey results

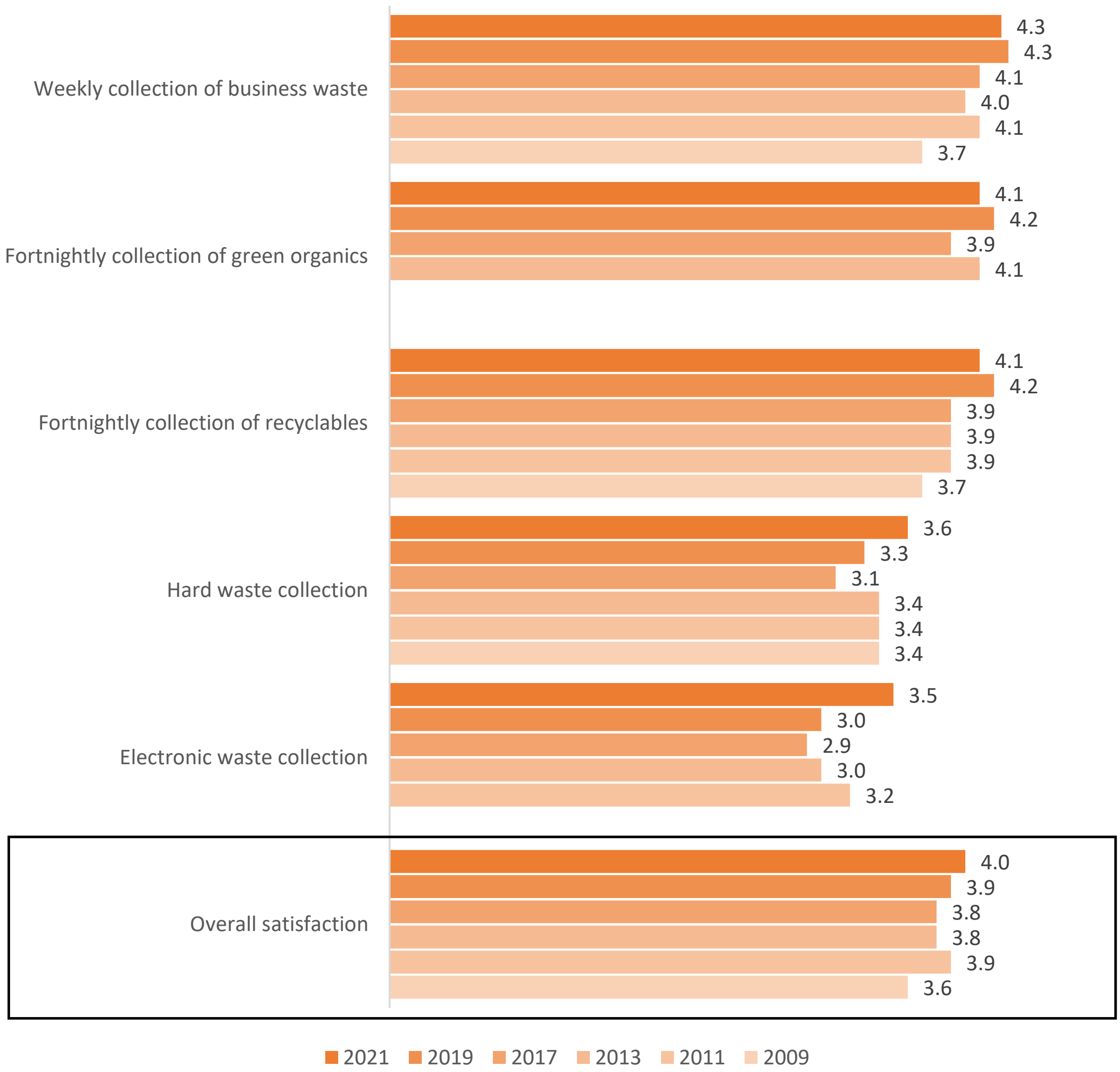
Q1: Do you operate a business in the City of Norwood Payneham & St Peters? *(Single response)*

Only businesses that said yes to this question were included in the survey.

Waste Collection & Recycling

Q2: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your level of satisfaction in relation to the waste and recycling services provided by the City of Norwood Payneham & St Peters.

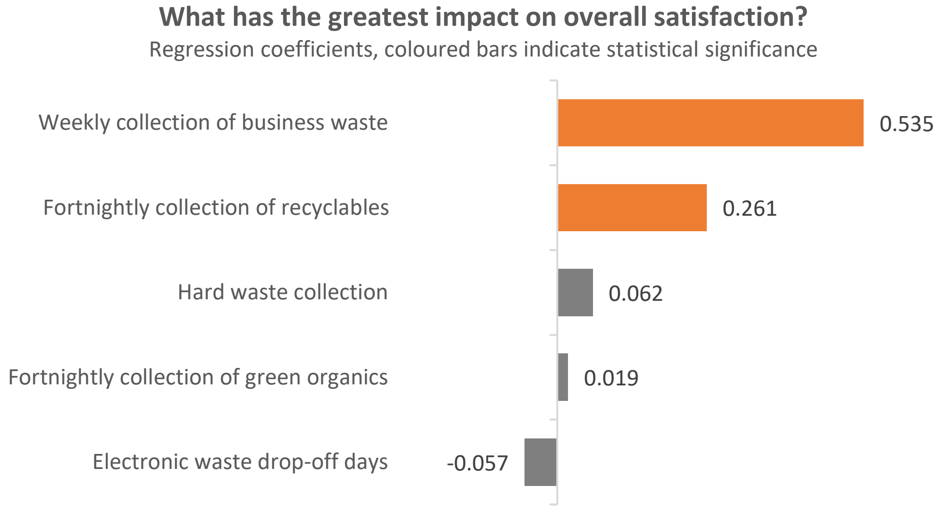
Q2 Satisfaction with waste collection & recycling



*Please note that fortnightly collection of green organics has only been asked for the last four survey periods hence the gap in reporting above.

Businesses indicate the highest level of satisfaction with their weekly collection of business waste at 4.3 out of 5 (equal to 2019). Satisfaction with all other waste and recycling services remained consistent with 2019 with the exception of hard waste collection which has increased significantly to 3.6 (compared to 3.3 in 2019) and electronic waste collection which has climbed from 3.0 to 3.5 out of 5. Overall satisfaction has reached 4 out of 5 which is the highest score out of the six performance areas.

For businesses, the weekly collection of business waste has the greatest impact on overall satisfaction, followed by fortnightly collection of recyclables.

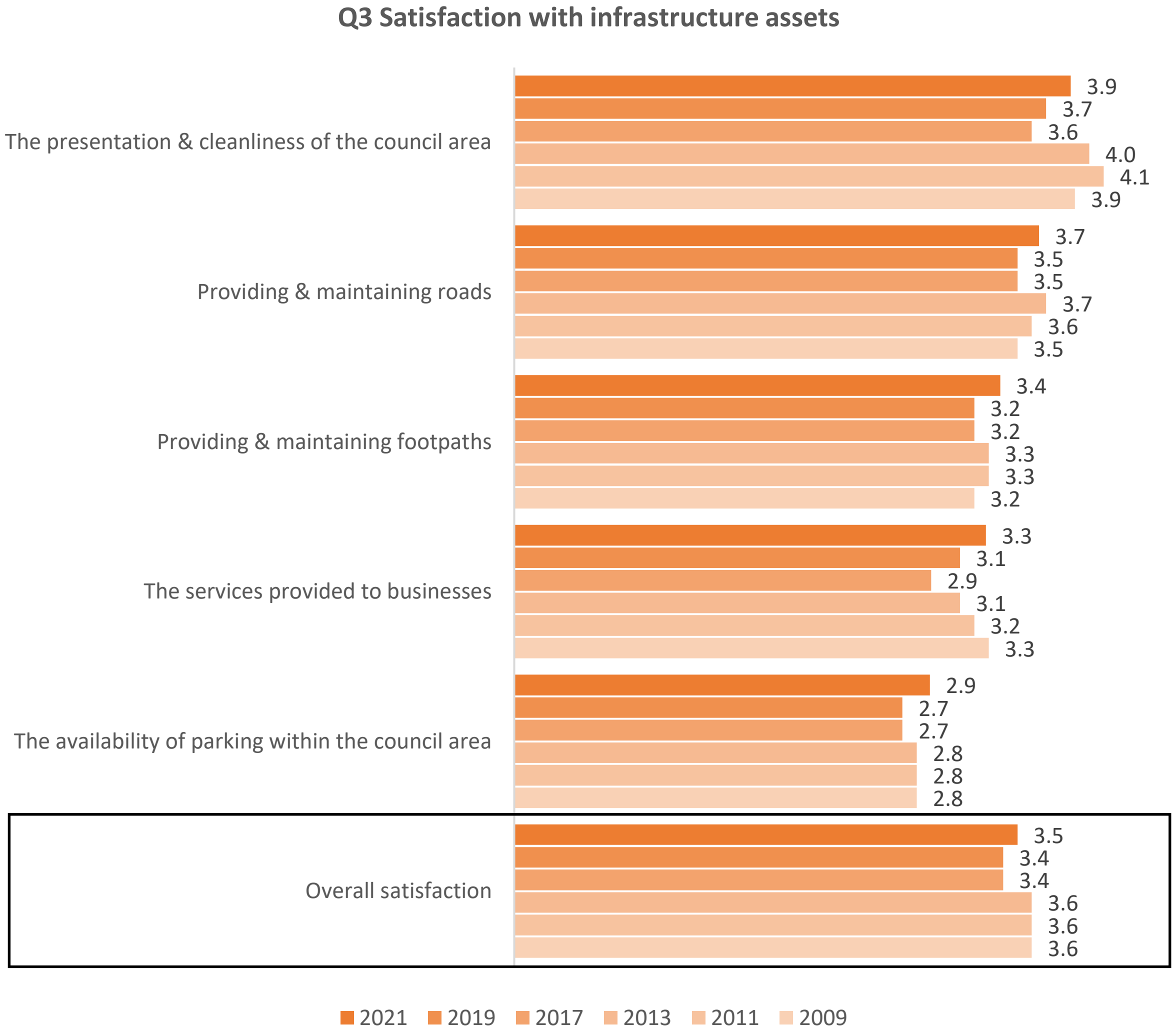


(Regression coefficients, coloured bars indicate statistical significance. Grey bars, while they show some effect, are not statistically significant and should be viewed as indicative).

The regression tells us that for every increment of 1 in the satisfaction with the weekly collection of business waste, overall satisfaction with waste collection & recycling increases by 0.535 and fortnightly collection of recyclables increases overall satisfaction by 0.261.

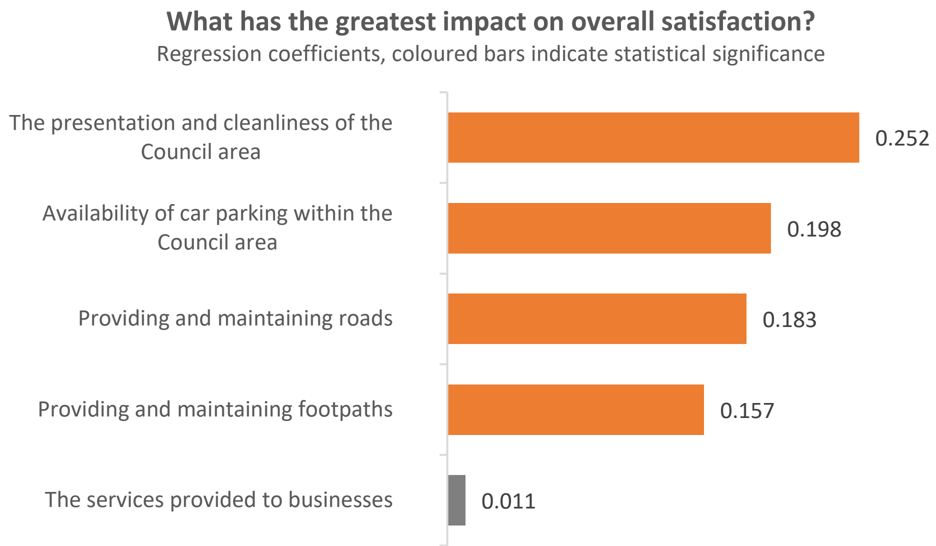
Infrastructure

Q3: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your level of satisfaction in relation to the infrastructure assets in the City of Norwood Payneham & St Peters.



Pleasingly, average satisfaction in all areas of infrastructure have shown slight increases since 2019. The satisfaction with presentation & cleanliness of the Council area is the highest it has been in eight years (3.9) while the availability of parking within the council area has also improved slightly (2.9) – this is a mixed message as car parking concerns are featured heavily throughout the open-ended questions later in this survey. However, at 2.9 out of 5 it does suggest Council still needs to focus on this. Overall satisfaction remains consistently low throughout the 6 survey periods.

As in previous surveys, using a regression analysis, it is revealed that all sub-areas have mild (>0.1) to strong impact on overall satisfaction with infrastructure. The presentation and cleanliness of the Council area is clearly a major factor that impacts the overall satisfaction. Continuing the improvement to road infrastructure (footpaths, roads and car parking) is one of the main areas again to be addressed to further boost overall satisfaction.

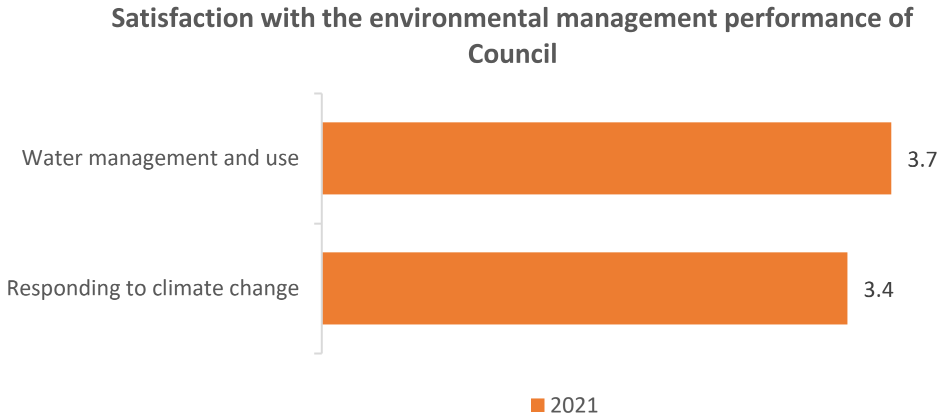


(Regression coefficients, coloured bars indicate statistical significance. Grey bars, while they show some effect, are not statistically significant and should be viewed as indicative).

The regression tells us that for every increment of 1 in the satisfaction with the presentation & cleanliness of the Council area, overall satisfaction with infrastructure increases by 0.252 and availability of car parking increases overall satisfaction moderately by 0.198 and providing and maintaining roads increases it by 0.183.

Environmental Management

Q4: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your level of satisfaction in relation to the environmental management performance of the City of Norwood Payneham & St Peters.

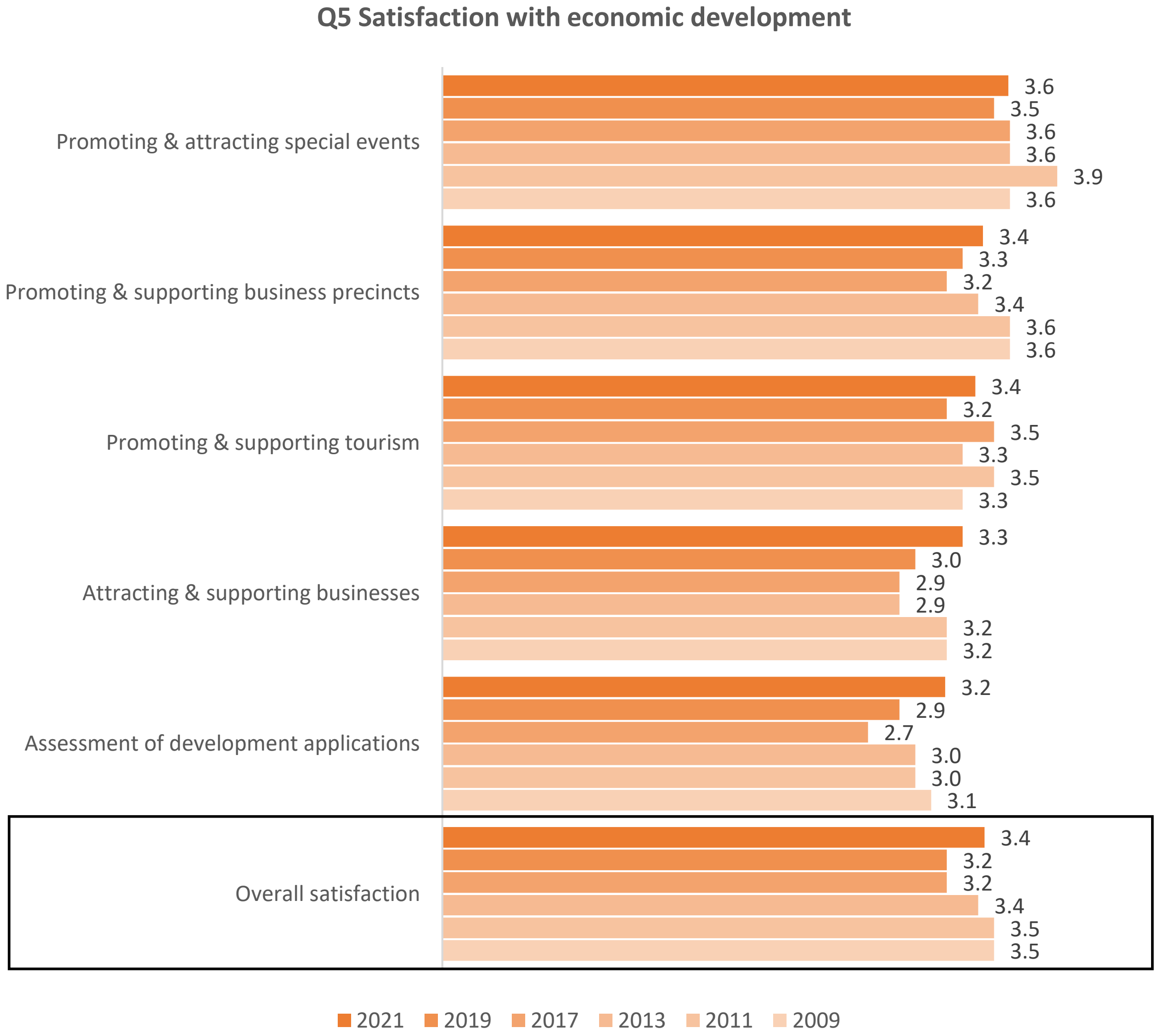


This was a new question in 2021 and shows that water management has a higher level of satisfaction amongst businesses than Council's response to climate change. This may well be a communication issue in that businesses are not aware of what Council has done to respond to climate change.

Regression analysis cannot be included for this performance area as overall satisfaction was not asked.

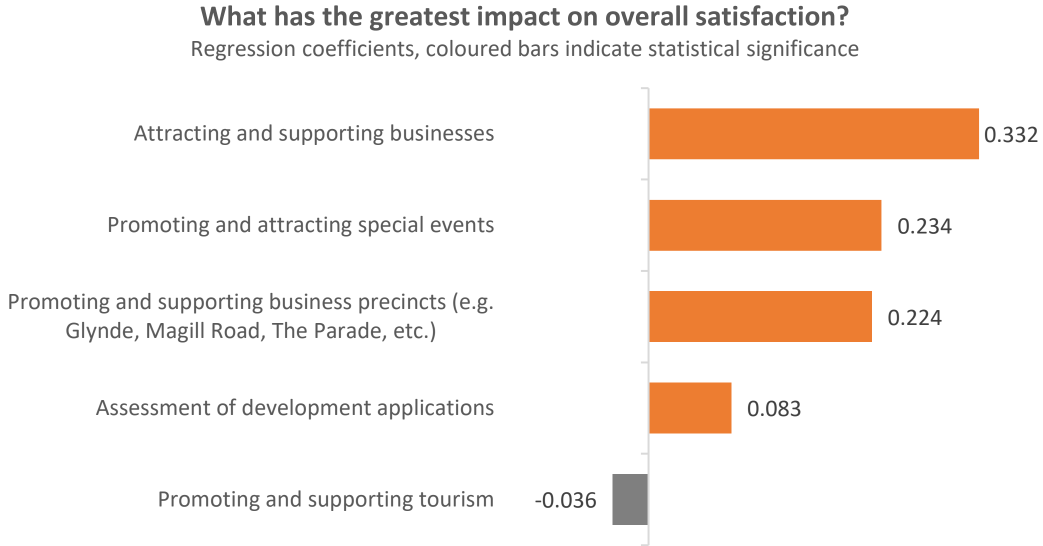
Economic Development

Q5: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate the performance of the City of Norwood Payneham & St Peters in the area of economic development.



Overall satisfaction with economic development has increased slightly in 2021 (3.4) as have the ratings for all sub-areas, particularly attracting and supporting businesses (3.3) and assessment of development applications (3.2).

The greatest impact to overall satisfaction arises from Council's attraction and support of businesses to the Council area. Furthermore, promoting & attracting special events and supporting business precincts also has a moderate impact on overall satisfaction (as it has in the past).

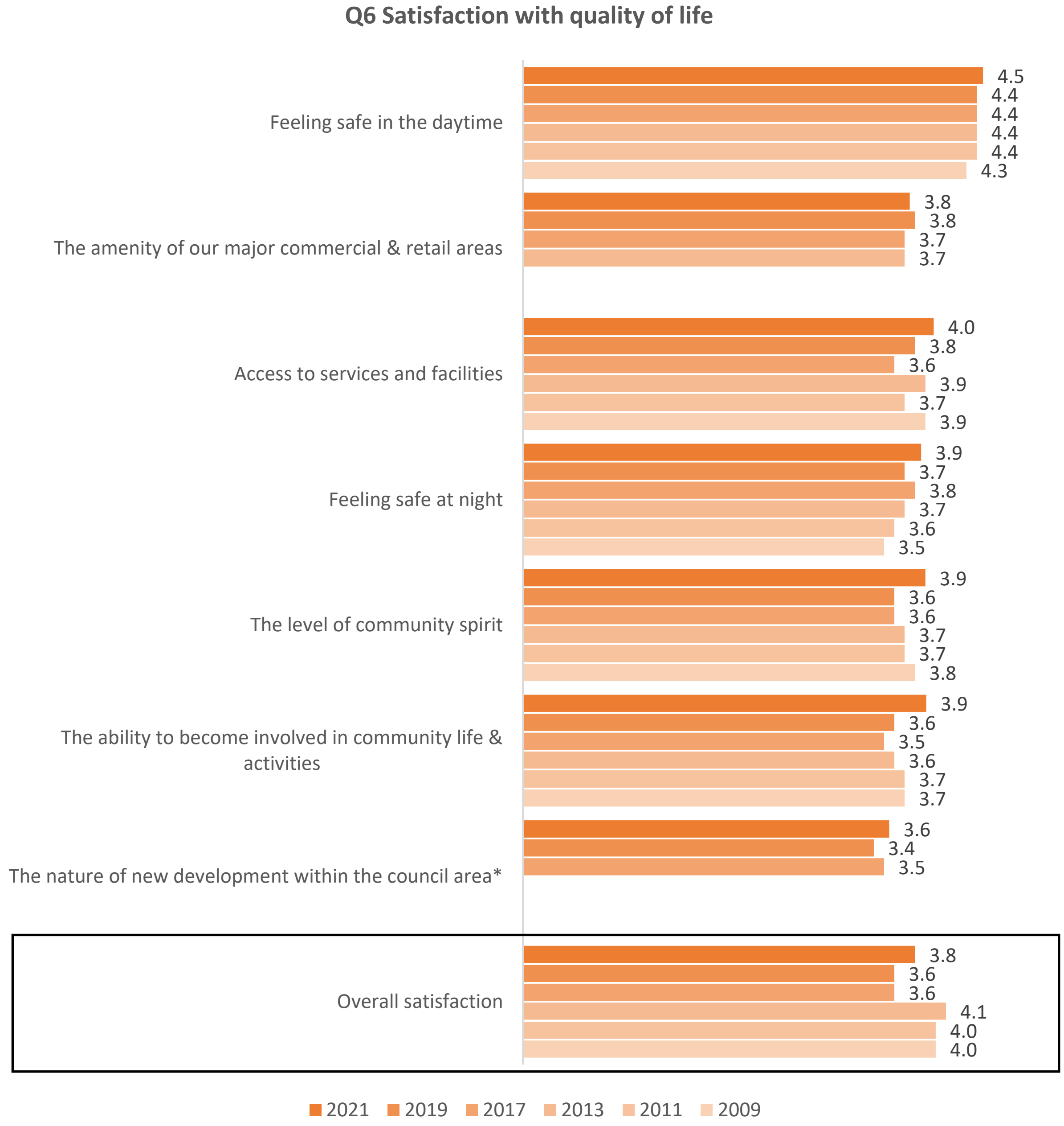


(Regression coefficients, coloured bars indicate statistical significance. Grey bars, while they show some effect, are not statistically significant and should be viewed as indicative).

This regression tells us that for every increment of 1 in the satisfaction with attracting and supporting businesses, overall satisfaction with economic development increases by 0.332 and promoting and attracting special events (0.234) and promoting and supporting business precincts (0.224).

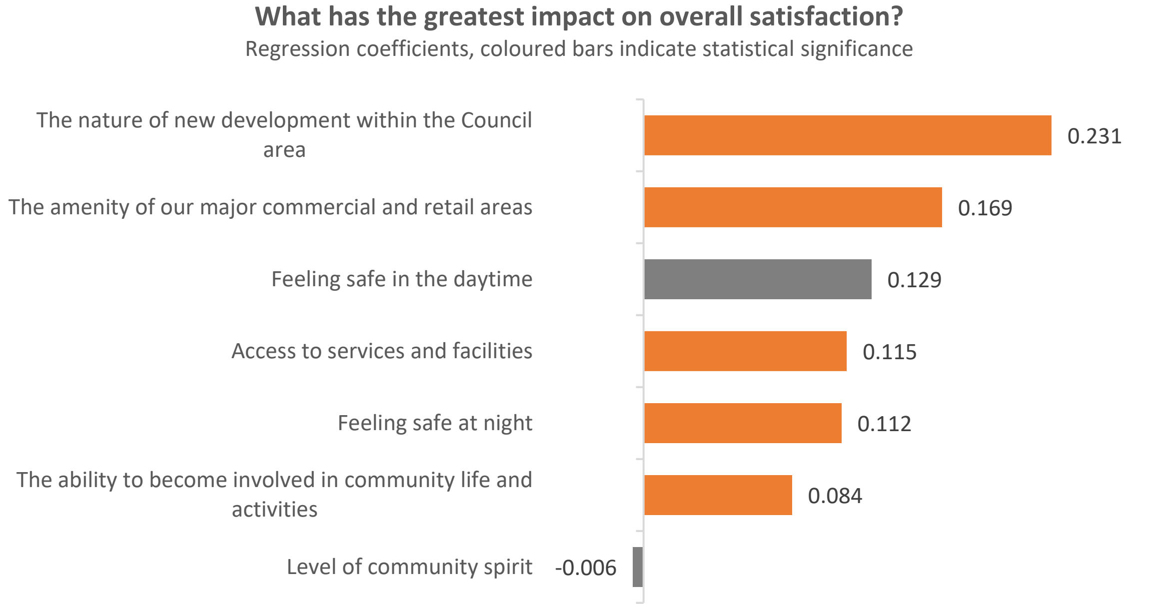
Quality of Life

Q6: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your quality of life in the City of Norwood Payneham & St Peters.



*Note: 'The nature of new development within the Council area' was changed from 'The appearance of new development within the Council area' in 2019. Also, the amenity of our major commercial & retail areas has only been asked in the last four surveys hence the gap in the chart.

Satisfaction with feeling safe in the daytime continues to remain high with a slight increase in 2021 over the previous year (4.5). All sub-areas have also shown a slight increase this survey period over the previous ones and overall satisfaction is up 0.2 points.

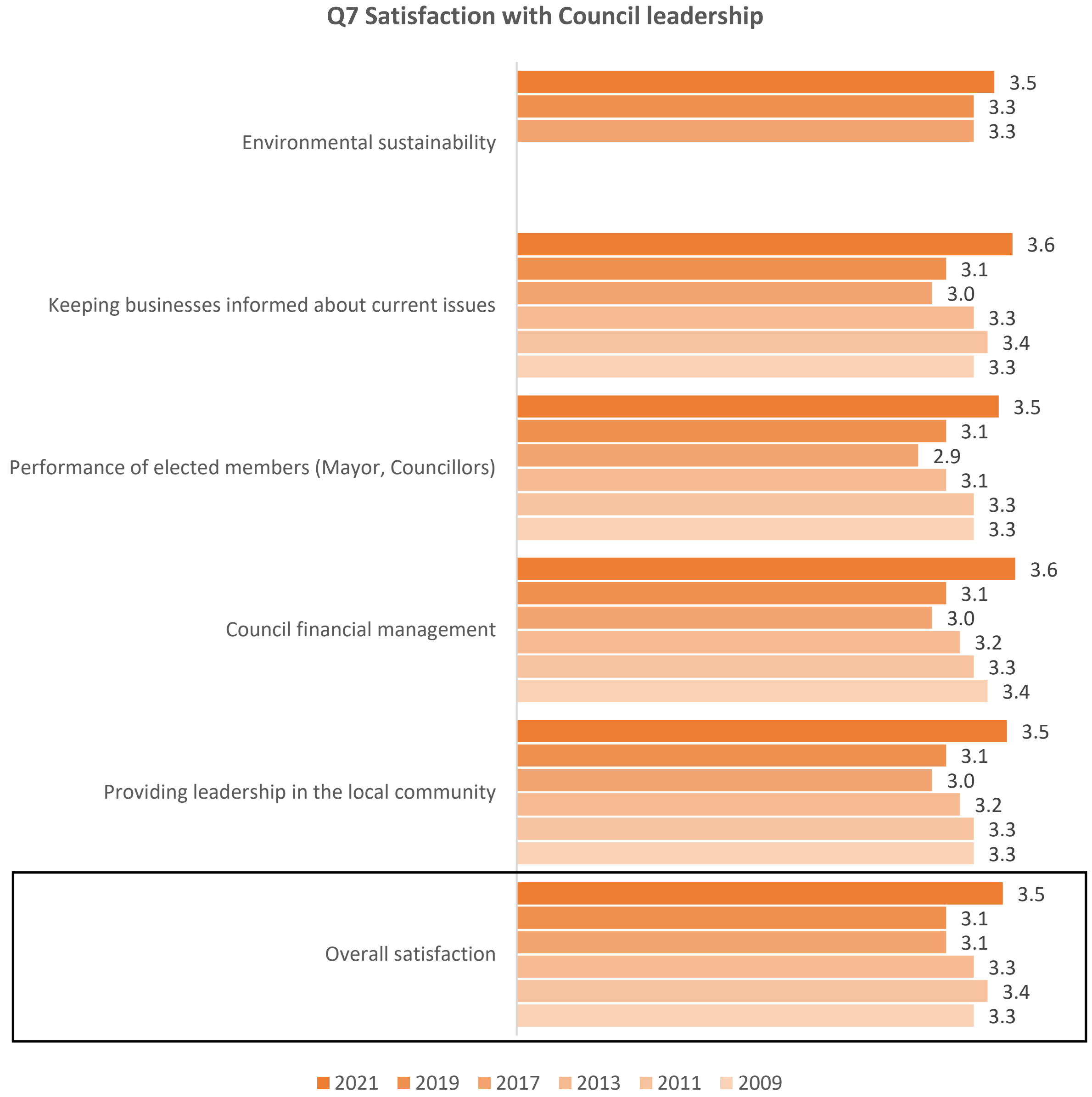


(Regression coefficients, coloured bars indicate statistical significance. Grey bars, while they show some effect, are not statistically significant and should be viewed as indicative).

This regression tells us that for every increment of 1 in the satisfaction with the nature of new development within the Council area increases satisfaction with quality of life by 0.231 as a moderate impact and the amenity of our major commercial and retail areas by 0.169 as a moderate impact also.

Leadership

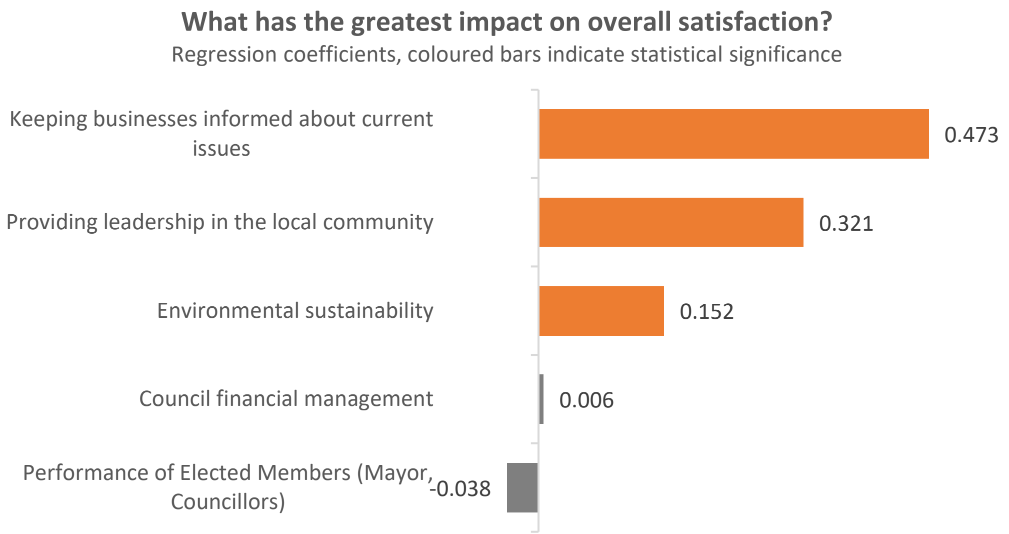
Q7: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your level of satisfaction in relation to the leadership of the City of Norwood Payneham & St Peters.



*Please note that environmental sustainability has only been asked for the last three survey periods hence the gap in reporting above.

Overall satisfaction and all sub-areas have increased significantly this survey period particularly keeping business informed about current issues (3.6), performance of Elected Members (3.5), Council financial management (3.6) and providing leadership in the local community (3.5). Having said this the scores are low compared to many of the other major topics but it is nevertheless good to see such substantial improvements.

Keeping business informed about current issues has the most impact on overall satisfaction with Council leadership. As suggested by open-ended feedback from businesses, higher engagement with businesses by Council will lead to improved perceptions and satisfaction with Council.



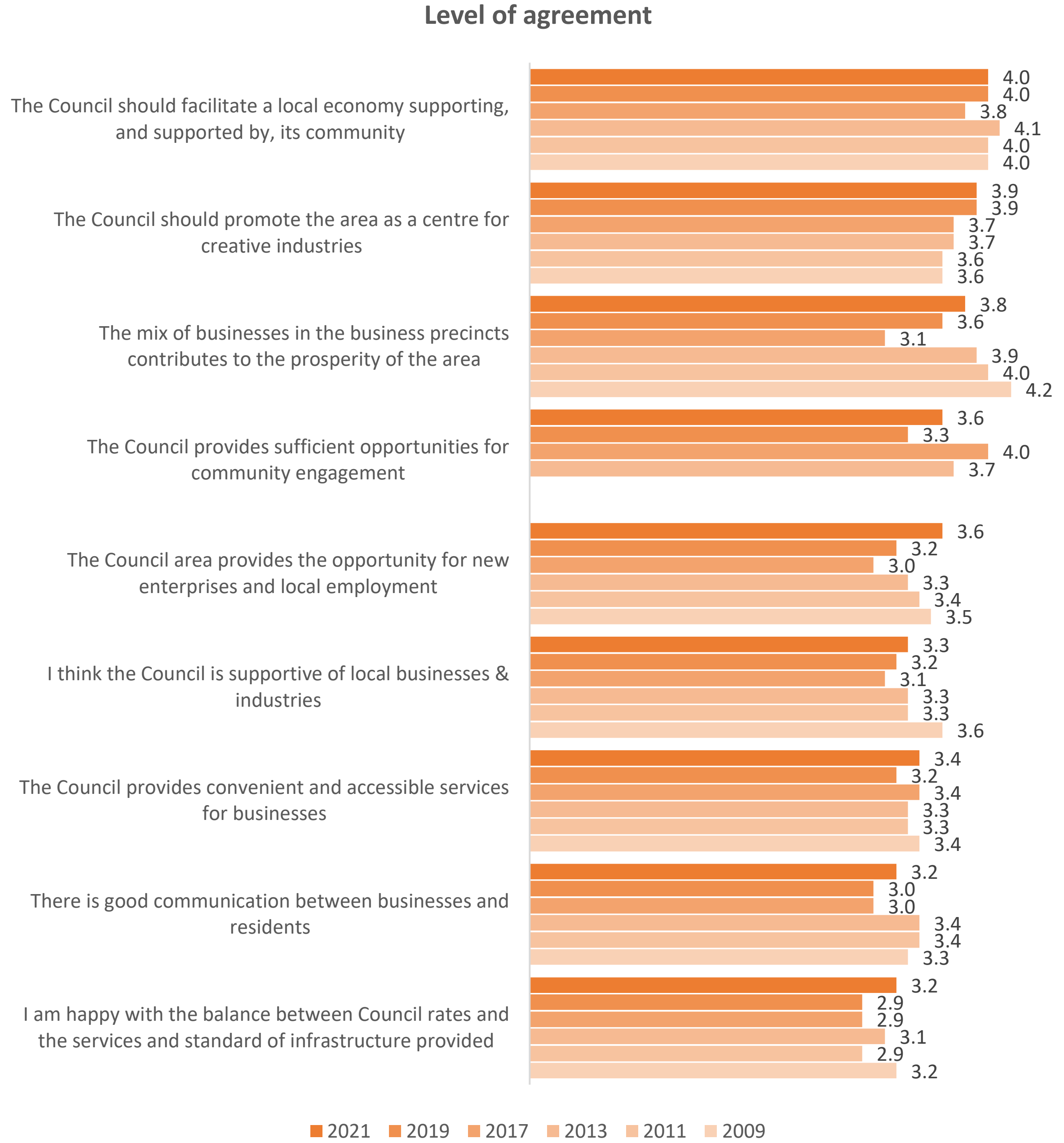
(Regression coefficients, coloured bars indicate statistical significance. Grey bars, while they show some effect, are not statistically significant and should be viewed as indicative).

This regression tells us that for every increment of 1 in the satisfaction with keeping businesses informed about current issues increases the satisfaction with leadership by 0.473 and providing leadership in the local community increases satisfaction by 0.321.

These aspects make the biggest contribution, and critical in maintaining overall satisfaction with leadership for businesses.

Perception Statements

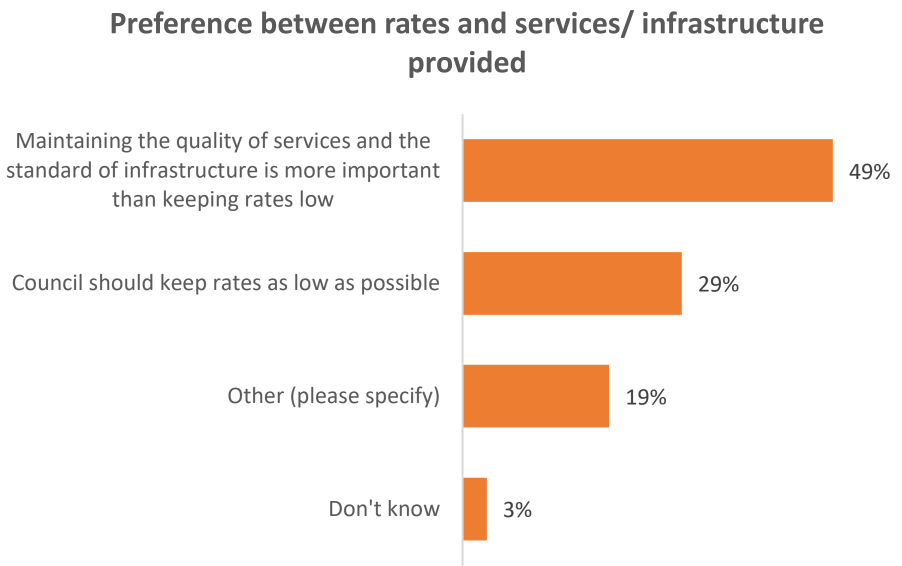
Q8/9: On a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate your level of agreement with the following statements in relation to Council.



*Please note that The Council provides sufficient opportunities for community engagement has only been asked for the last four survey period hence the gap in reporting above.

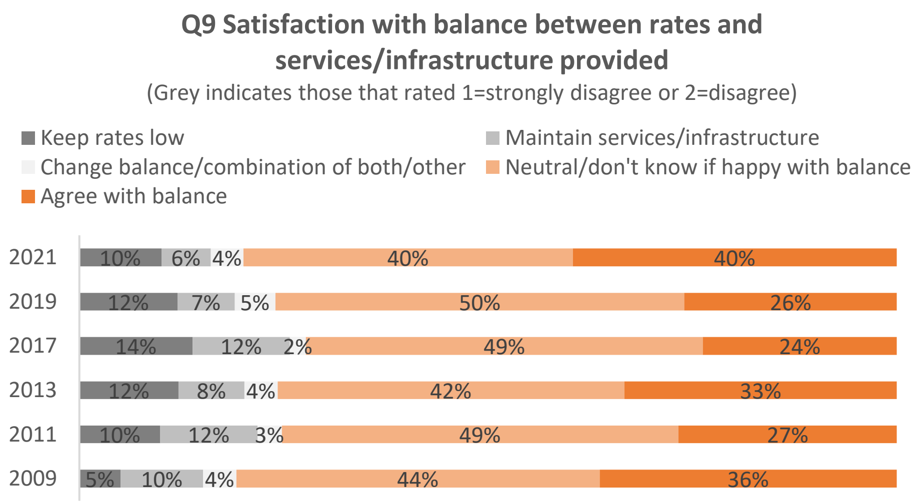
Most statements scored either on par or better than the previous survey with all statements scoring above 3 out of 5. Most notable increases were for *"The Council area provides the opportunity for new enterprises and local employment"* (3.6) and *"The Council provides sufficient opportunities for community engagement"* (3.6).

Q10: Which of the following would you prefer? *(Single response)*



Businesses were asked if they would prefer maintaining quality of services and infrastructure more than keeping rates low. Among those who indicated dissatisfaction (20% of the businesses), 49% preferred to maintain the quality of services over keeping rates low, which is completely opposite to the 2019 results where 47% indicated a preference for the Council to keep rates as low as possible.

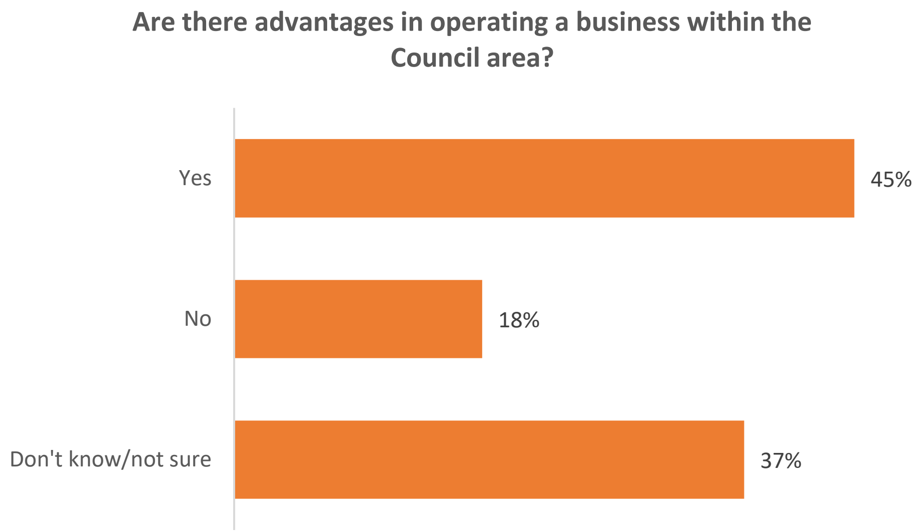
When analysing the sample as a whole, 15.5% of this business community indicated lower rates as being more important than services / infrastructure provided. There were 6 'other' responses and they were asking for a balance of the two with one calling for more Council innovation to achieve this.



Overall, 40% of the businesses indicated agreement with the balance between rates and services/infrastructure provided while only 20% indicated disagreement in 2021.

Advantages and disadvantages of operating in the area

Q11: Do you think there are any advantages of operating a business within the Council area? *(Single response)*



Nearly half of all businesses say there are advantages in operating a business within the Council area but more importantly only one in five say they don't believe there are any advantages.

Advantages

Q12: What are the advantages of operating a business within the Council area? *(Open ended)*

There are substantial differences in responses in 2021 compared to previous surveys most probably brought about by COVID and survey fatigue. Only 45% of all respondents this survey believed that there were advantages in operating a business in the Council area. The most common theme is location is good for customers/business nominated by 43% of those who believe there are advantages, followed by 29% close to city/central location/ideal location and 27% who said they are close to other businesses/facilities that they use.

Advantages Q11/12	2009	2011	2013	2017	2019	2021
Close to City/central location/ideal location	29%	46%	46%	51%	76%	29%
Location is good for customers/business	14%	35%	54%	48%	66%	43%
We're close to other businesses/facilities we use	3%	8%	13%	8%	29%	27%
It has a positive image as a shopping destination	4%	10%	9%	8%	28%	23%
Get business from passing vehicle/pedestrian traffic	5%	8%	5%	6%	22%	16%
Council support/communication/initiatives	-	-	-	-	-	20%
Other advantages	16%	12%	12%	25%	6%	9%
Total - stating advantages	62%	76%	83%	80%	86%	45%
Don't know/not sure if any	8%	4%	1%	7%	7%	37%
No advantages	31%	20%	16%	13%	7%	18%

The following are verbatim comments from respondents grouped under the various themes as examples of the various comments. The most common theme was location being good for customers and the business.

Location is good for customers/business (39 comments)

- We moved our business into the area 2 years ago having been in the western suburbs for 30 years. Our customer flow and quality has improved

Close to City/Central Location/Ideal Location (27 comments)

- Accessibility and well-maintained environment
- Close to city but not in the city. It has a good atmosphere
- Strategic well-known area, centralised and accessible from other cities or suburbs
- Close to the city, good area, nice open streets, attracts the more opulent clientele
- Locals like to shop in their community area
- There are complementary businesses around, we are a destination location and close to the city.
- Close to the city, good area, nice open streets, attracts the more opulent clientele.

We are close to other businesses/facilities we use (24 comments)

- As an accommodation provider, the array of good restaurants helps to attract guests
- Creative business hub
- Easy access to business amenities
- Good mixed demographic of businesses
- Good facilities and a mix of businesses and people living in the area to use the facilities, the services and who frequent the businesses allowing businesses to prosper
- As operating a financial service business, the Council area has a good reputation to operate the business.

It has a positive image as a shopping destination (21 comments)

- Destination for many people outside of the catchment area
- The Norwood Precinct over the years has become the heart of the council area, with many businesses and cafes it makes it attractive to frequent and has a cosmopolitan feel. It is alive.

Council Support/Communication/Initiatives (18 comments)

- Support from council on promoting the business and generating community.
- Progressive vision and action
- Engages community and promotes wellbeing and positive mental health outcomes
- Supportive of small business and sense of community.
- Supporting local is important. Being supported by local council and community helps build that strength and trust in my business.

Get business from passing vehicle/pedestrian traffic (14 comments)

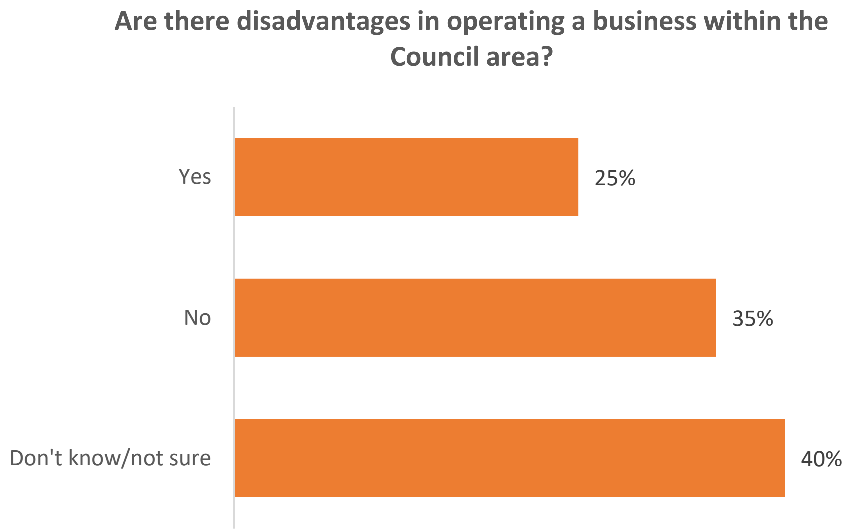
- The Parade is a strong retailing precinct with good foot traffic.
- Relatively high socioeconomic demographic of residents. Good access to public transport and easy use of roads. Fairly central location. Lots of like-minded businesses in the area.
- High profile LGA that allows for a variety of foot and road traffic. Especially in a service industry. Also, the 5069 postcode services our business well in terms of central positioning.

Other responses (8 comments)

- Infrastructure

Disadvantages

Q13: Do you think there are any disadvantages of operating a business within the Council area? *(Single response)*



Only 25% of all respondents claimed that there were disadvantages to operating a business within the Council area but a substantial number did not know or were not sure. We believe this is also a reflection of COVID and survey fatigue.

Q14: What are the disadvantages of operating a business within the Council area? *(Open ended)*

Of the 25% (50 businesses) of respondents, the following disadvantages were cited. 2021 saw lack of parking/parking issues dominated (42%) followed by issues with the Council (28%) and issues with particular location/neighbours (24%). Other disadvantages were disparate with no major theme.

Disadvantages Q13/14	2009	2011	2013	2017	2019	2021
Lack of parking/parking issues	14%	22%	25%	29%	52%	42%
Rates are too high^	7%	8%	11%	12%	20%	16%
Rent is too high^					20%	14%
Traffic is too heavy	3%	6%	9%	8%	17%	-
Council is too restricting/red tape	6%	-	-	3%	12%	-
Other disadvantages	7%	1%	1%	24%	10%	18%
Business and residents have conflicting needs	-	1%	1%	-	-	8%
Issues with Council	-	5%	6%	-	-	28%
Issues with particular location/neighbours	-	7%	4%	-	-	24%
Issues with infrastructure	-	-	-	-	-	14%
Total - stating disadvantages	32%	43%	52%	57%	74%	25%
Don't know/not sure	2%	-	1%	6%	15%	40%
No disadvantages	66%	57%	47%	37%	11%	35%

^Rates/rent too high were combined for years 2009-2017.

The following are some verbatim comments to illustrate the themes.

Lack of parking/parking issues (21 comments)
- Allowing commercial developments without providing onsite car parking for staff
- Currently, a serious parking issue with the 'Coles' site being developed and the removal of the carpark. This has affected business negatively.
- Our customer base has decreased over the last few years due to insufficient parking. Not all businesses are able to service clients in a 1-hour parking zone, it needs to be more varied with shorter and longer times, where appropriate. To have asked years ago to re assign the taxi zone that is never used to customer parking yet be ignored is frustrating and severely disappointing.
- We work in local post office on Kensington Road and customers complain about finding a car park.
- The parking situation in Norwood is atrocious. We were told that the car park where the Coles was would still be available and it is not. This will be at least 3 years and is causing major problems for businesses
- NOT ENOUGH PARKING! Too much petty crime. It is becoming scarier.
- Allowing commercial developments without providing onsite car parking for staff

Issues with Council (14 comments)
- Council is not supportive
- Flexibility on outdoor cover from the elements, for businesses outside of the Parade
- Poor communication, lack of empathy, innovation, and general support. They think they are helping, and they think they do a good job and that is the problem because they don't.
- Certain individuals in the council are incredibly hard to talk with, arrogant, difficult on all occasions.
- I have been 3 years on Payneham Road, and I barely received as much support as The Norwood Parade receives. Not expecting the exact same treatment but there should be more support for other areas like Magill Road as well. I just see a lot of The Norwood Parade in the media. I do receive invitations to council events but sometimes is good to offer two of the same in case the first one is missed. Just an idea.

Issues with particular location/neighbours (12 comments)
- We have experienced more petty crime in the Kent Town area (housing trust tenants) in 1 year then we ever did in ten years located in Adelaide City

Rates are too high (8 comments)
- High cost of rates & taxes lack of parking.

Infrastructure (7 comments)
- Bad reception (cell phone, internet)
- Dated infrastructure, especially on telecommunication and internet
- Poor footpaths, no council communication

Rent is too high (7 comments)
- Increasingly high rents compared to the city.
- Land value and high rent
- Rental is expensive, but probably fair
- Increasingly high rents compared to the city.

Business and residents have conflicting needs (4 comments)

- Lower budget clientele scared away

Other disadvantages (9 comments)

- Flexibility on outdoor cover from the elements, for businesses outside of The Parade
- Lots of large vacant buildings that are eventually occupied by charity shops - too many on The Parade

Engaging with Council

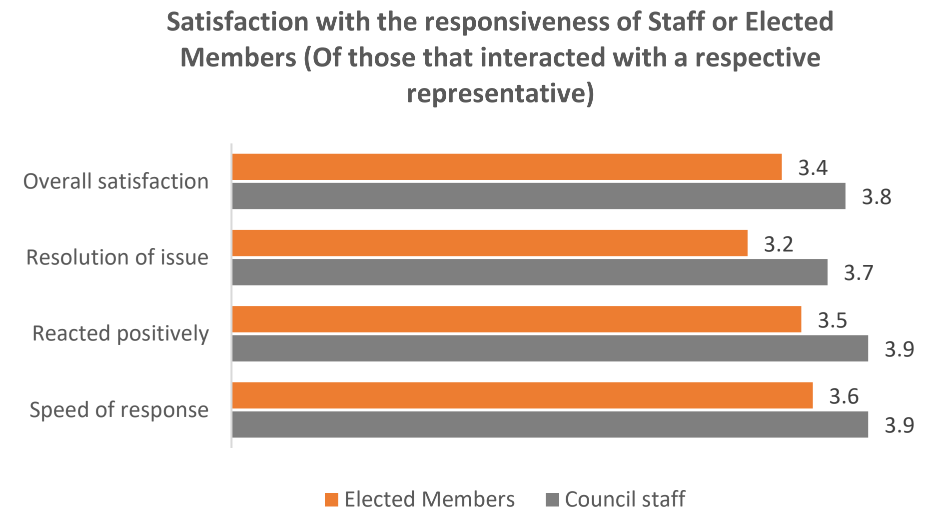
Q15: When was the last time you had any dealings with Council staff? *(Single response) and* Q17: When was the last time you had any dealings with the any of the Elected Members (Mayor and Councillors)? *(Single response)*

Businesses were asked when was the last time they dealt with Council staff or Elected Members. Clearly interactions with Council staff are more common than with Elected Members. The number of interactions for staff and Elected Members has remained relatively stable over the past three surveys.

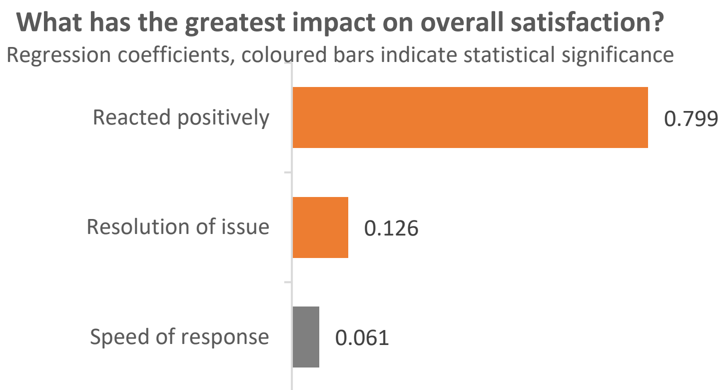
	2009	2011	2013	2017	2017	2019	2019	2021	2021
	Combined staff and Elected Members			Council Staff [n=191]	Elected Members [n=191]	Council Staff [n=203]	Elected Members [n=203]	Council Staff [n=200]	Elected Members [n=200]
Within the last week	9%	12%	5%	10%	2%	9%	1%	11%	1%
Within the last month	13%	10%	13%	7%	2%	7%	1%	10%	4%
Within the last 3 months	11%	9%	8%	9%	4%	11%	3%	15.5%	1.5%
Within the last 6 months	9%	9%	9%	9%	2%	11%	3%	10%	2%
Within the last year	14%	12%	17%	13%	6%	9%	4%	14%	3%
Within the last 2 years	7%	9%	10%	10%	2%	12%	5%	6%	6%
Within the last 5 years	7%	8%	5%	6%	2%	3%	2%	3%	3%
More than 5 years ago	1%	5%	5%	4%	2%	4%	4%	2%	4%
Ever interacted with Council	71%	74%	72%	66%	20%	67%	25%	69%	24%
Can't recall	7%	5%	9%	12%	18%	12%	19%	13%	20%
Never	22%	21%	19%	21%	62%	21%	57%	19%	57%

Q16: How satisfied were you with the responsiveness of the staff member? And Q18: How satisfied were you with the responsiveness of the Elected Member?

The satisfaction questions for both interactions with staff and Elected Members were re-engineered this survey so there is no historic data in which to compare the results. The following chart shows greater satisfaction with staff than Elected Members. Interestingly the satisfaction levels are relatively similar across the four attributes.

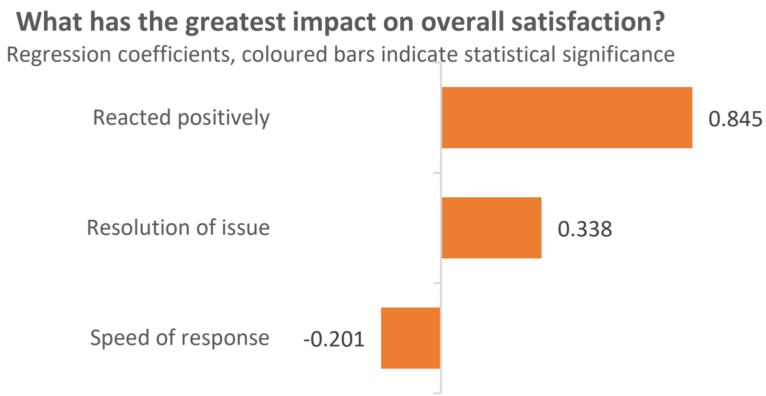


Staff



Reacting positively has the greatest impact on satisfaction with the responsiveness of staff. This regression tells us that for every increment of 1 in the satisfaction with positive reaction increases the satisfaction with responsiveness of staff by 0.799. Satisfaction with the resolution of issue has only a moderate impact on overall satisfaction.

Elected Members



Reacting positively has the greatest impact on satisfaction with the responsiveness of Elected Members. This regression tells us that for every increment of 1 in the satisfaction with positive reaction increases the satisfaction with responsiveness of Elected Members by 0.845. Satisfaction with the resolution of issue has only a moderate impact on overall satisfaction.

Receiving information from Council

Q19: How would you prefer to receive information about the Council's services and activities? Please choose all that apply. *(Multiple response)*

Businesses prefer to find out information regarding Council services and activities primarily through the Council's 'YourBusiness' email (61%) followed by Council's website (39%) and social media pages (24%). Social media pages have increased again this survey period making it an ideal communication vehicle for businesses in the Council area.

Preferred Sources (Q19)	2009	2011	2013	2017	2019	2021
Council's "YourBusiness" email	-	-	-	-	-	61%
Council's website	20%	29%	22%	28%	39%	39%
Social media pages	-	-	1%	9%	20%	24%
LookEast	4%	12%	5%	16%	25%	18%
Other Council publications / fliers / mailouts / fridge magnets	42%	34%	26%	28%	27%	16%
Precinct websites	-	-	1%	3%	11%	14%
Precinct networking events	-	-	-	-	7%	13%
Community events	-	-	<1%	1%	5%	11%
Council staff	10%	11%	13%	3%	4%	10%
Council's library/Library noticeboards	1%	3%	1%	1%	2%	9%
Word of mouth	2%	0%	1%	1%	4%	7%
Adelaide East Herald	-	-	-	-	-	6%
Messenger articles	2%	14%	15%	10%	12%	-
Council's monthly Messenger column	13%	5%	5%	5%	8%	-
Other^	4%	2%	3%	38%	32%	3%
Do not find out information/don't know	3%	1%	3%	-	4%	

^Responses mentioned in 'other' were email, letterbox drop or phone call

Involvement with Council-run events

Q20: Has your business been involved in any of the following Council-run events in the last 3 years? Note that these events aren't necessarily current or ongoing. Please choose all that apply. *(Multiple response)*

Council-run events have changed considerably over the COVID-19 pandemic period with many events not proceeding so the list for 2021 is substantially different to previous lists. Business networking (11%) and Fashion on Parade (10%) are the most popular. Involvement in Council-run events increased to all time high of 33%.

Involvement with Council-run events	2011	2013	2017	2019	2021
Business networking*	-	-	-	-	11%
Fashion on Parade	-	-	-	2%	10%
Business workshop*	-	-	-	-	7%
Eastside Business Awards*	-	-	-	-	7%
Art on Parade*	-	-	-	-	7%
Norwood on Tour Street Party (Tour Down Under)	7%	5%	2%	4%	4%
Food Secrets on the Green*	-	-	-	-	4%
St Peters Fair	1%	4%	2%	3%	3%
Food Secrets of Glynde Bus Tour*	-	-	-	<1%	3%
Twilight Carols & Christmas Market	-	-	1%	1%	2%
Norwood Christmas Pageant	11%	10%	4%	6%	-
Norwood on Tour Race (Tour Down Under)	-	-	2%	2%	-
Taste Glynde	-	-	2%	2%	-
Jazz in the park	-	-	-	1%	-
Precinct Networking Breakfasts & Events	-	4%	2%	1%	-
Cultural Heritage Events	-	-	-	1%	-
Youth Arts & Events (Canvas & Poolside)	2%	<1%	1%	1%	-
Australia Day celebration & citizenship ceremony	1%	1%	2%	<1%	-
Melodies in the Park	-	-	1%	<1%	-
Symphony in the Park	-	-	-	<1%	-
Every Generation Concert	-	<1%	-	-	-
Parades on Norwood Parade	4%	5%	4%	-	-
Involvement	21%	27%	13%	16%	33%
None of these	79%	73%	87%	84%	67%

*New additions in 2021

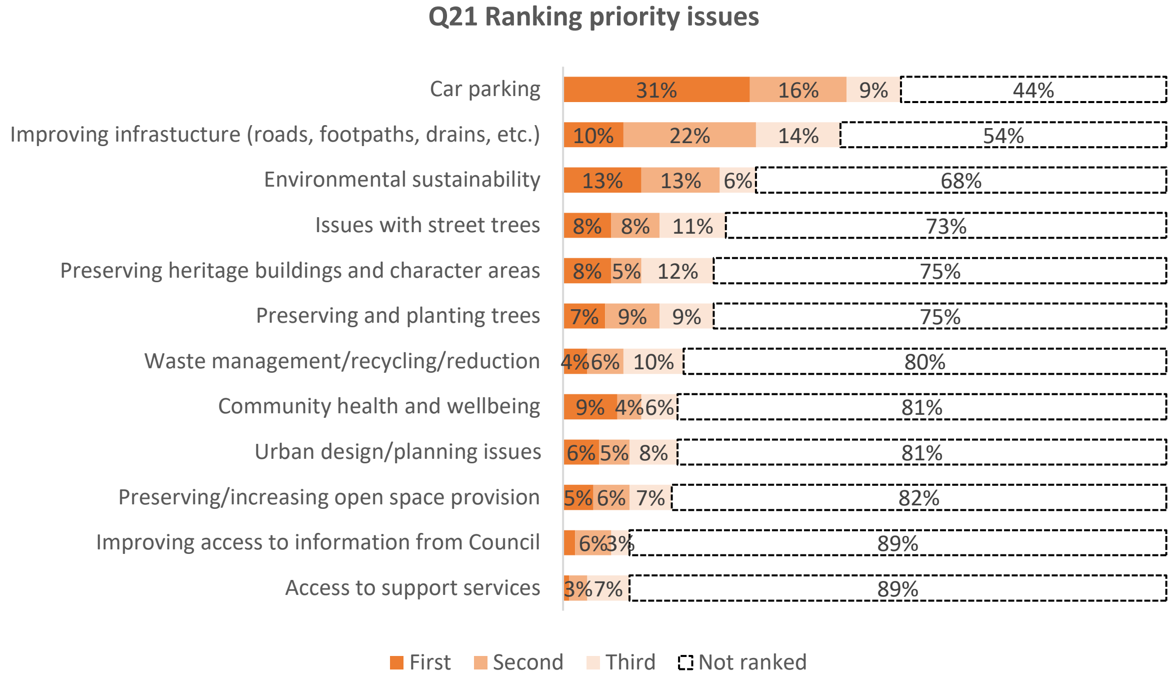
Issues of Importance

Q21: In your opinion, what are the three major issues that Council should be addressing in the next three years? Please rank the below issues in order of importance

Businesses were asked to rank their top three major issues for Council to address in the next 3 years. Car parking has now emerged as the highest priority area by 10% followed by improving infrastructure and then environmental sustainability.

	2011	2013	2017	2019	2021
Car parking	30%	28%	39%	39%	56%
Improving infrastructure (roads, footpaths, drains, etc.)	28%	28%	29%	50%	46%
Environmental sustainability	-	-	6%	30%	32%
Issues with street trees (roots, leaf litter)	-	-	9%	29%	26%
Preserving heritage buildings and character areas	2%	5%	5%	29%	25%
Preserving and planting trees	4%	5%	4%	21%	25%
Urban design/planning issues	12%	17%	21%	28%	18%
Waste management/recycling/reduction	5%	6%	6%	19%	19%
Preserving/increasing open space provision*	4%	5%	2%	16%	17%
Improving access to information from Council	5%	6%	8%	11%	11%
Access to support services	-	-	-	8%	10%
Promoting business**	9%	8%	13%	-	-
Community health and wellbeing***	-	-	-	-	18%
Other (specify)	4%	8%	7%	-	-
Total - specifying issues	95%	81%	83%	100%	100%
None/Don’t know	5%	19%	17%	-	-

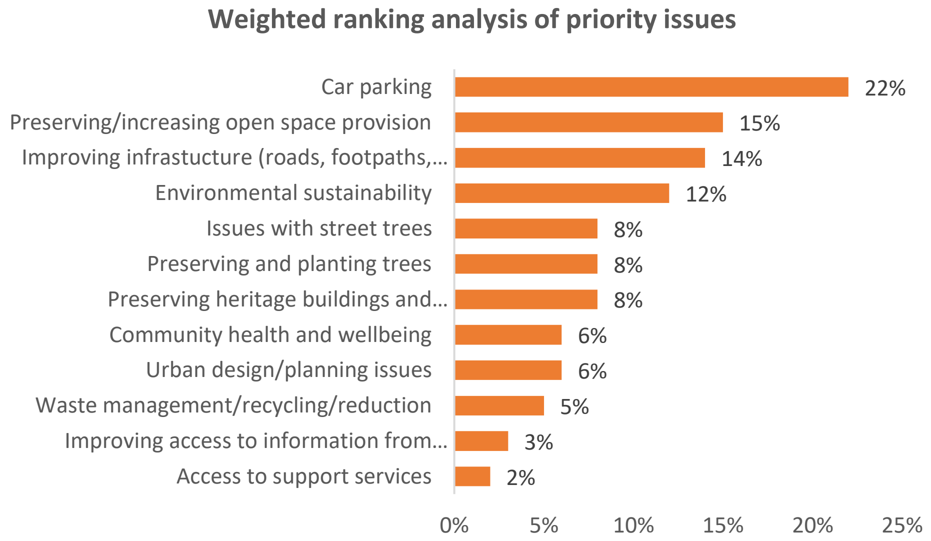
*This question was reworded slightly in 2021
**Taken from 'other' feedback in 2017, 2013 and 2011 results adapted from 'Economic development'.
***New question in 2021



The graph above shows the breakdown of ranking given to each issue. Issues have been sorted based on the proportion of ranking; more important issues will generally have more votes than less important issues, whether they are first, second or third.

When examining the ranking more closely, it is evident that 31% ranked car parking as the priority issue while 13% ranked environmental sustainability and 10% improving infrastructure. These are the three top areas identified by businesses that the Council should address in the next three years.

The following chart shows a slightly different view when we weight the rankings (first is given a weighted score of 3, second a weighted score of 2, and third a weighted score of 1). This changes the order slightly from the previous chart and shows car parking still the top response followed by preserving/increasing open space provision and improving infrastructure (roads, footpaths, etc.)



Engagement Sessions with Council

Q22: If you were to participate in a Council engagement session on a project or program (e.g. workshop, information night, etc.) which of the following days and times would best suit you? Please choose all that apply. *(Multiple response)*

Businesses were given the opportunity to indicate if they would like to participate in Council engagement sessions and if so when would be the most suitable times and days for them to participate. 17% of businesses do not want to participate but of those that do, evening was preferred by 27% of businesses and weekends by 33% of businesses.

Times (Q22)	**2017**	**2019**	**2021**
Morning (between 9am and 12pm)	21%	21%	25%
Afternoon (between 12pm and 4pm)	9%	19%	28%
Evening (between 7pm and 9pm)	46%	43%	34%
All of the above/no preference	1%	6%	13%
None of the above - I don't want to participate	28%	35%	17%

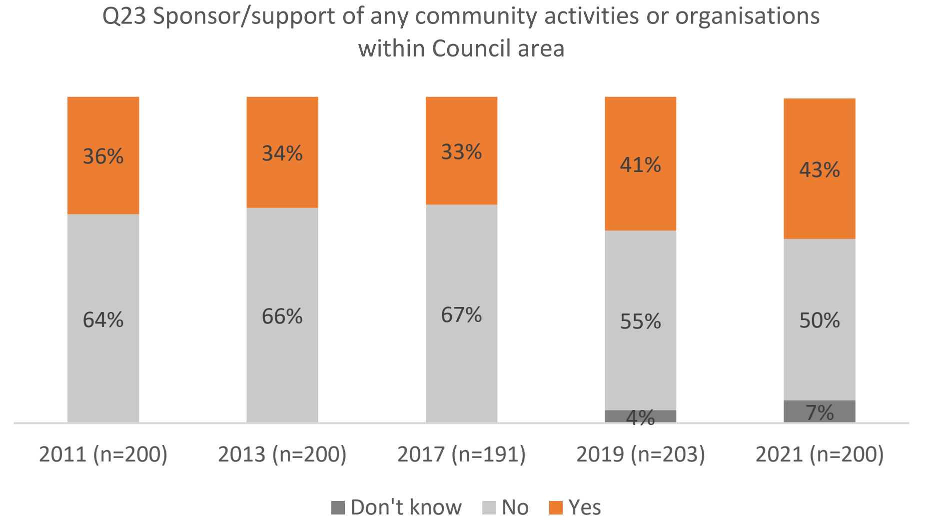
Days (Q22)	**2017**	**2019**	**2021**
Weekdays	64%	62%	36%
Weekends	4%	10%	44%
All of the above/no preference	3%	5%	20%
None of the above - I don't want to participate	28%	35%	17%

Local business support of other local activities / organisations

Q23: Does your business sponsor or support any community activities or organisations within the Council area? *(Multiple response)*

The level of support by local businesses has increased yet again this year from 41% in 2019 to 43% in 2021. This is the highest level of support recorded when compared to previous years.

Charities are the most commonly supported group (23%) and sporting clubs/groups (18%) with schools (16%) a close third.

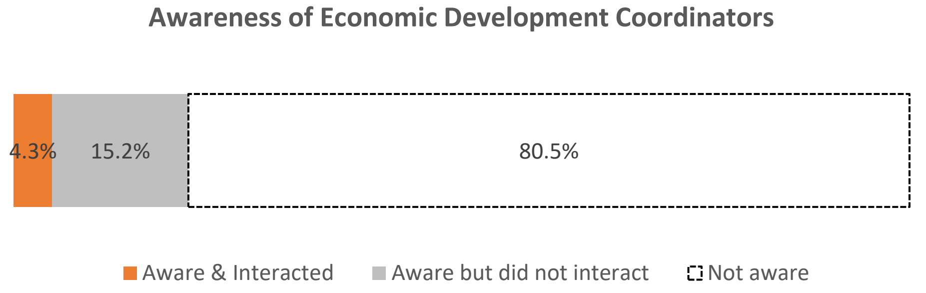


	2013	2017	2019	2021
Charities	11%	13%	20%	23%
Schools	14%	12%	15%	16%
Sporting clubs/groups	10%	12%	13%	18%
Social/service clubs	3%	8%	9%	10%
Council events/activities	3%	-	4%	9%
Cultural groups (e.g. music, entertainment)	-	-	-	7%
Other	6%	8%	7%	2%

Awareness of Economic Development Coordinators

Q24/25: Are you aware that the Council has an economic development team to assist businesses? Have you been in contact with the economic development coordinators, Stacey and Tyson? Do you have any feedback regarding this?

Businesses were asked whether they were aware that the Council has employed two Economic Development coordinators; 19.5% (up from 12% in 2019) were aware, however the majority (80.5%) were not aware. Only 4.3% of those surveyed had interacted with the coordinators.



Business Development

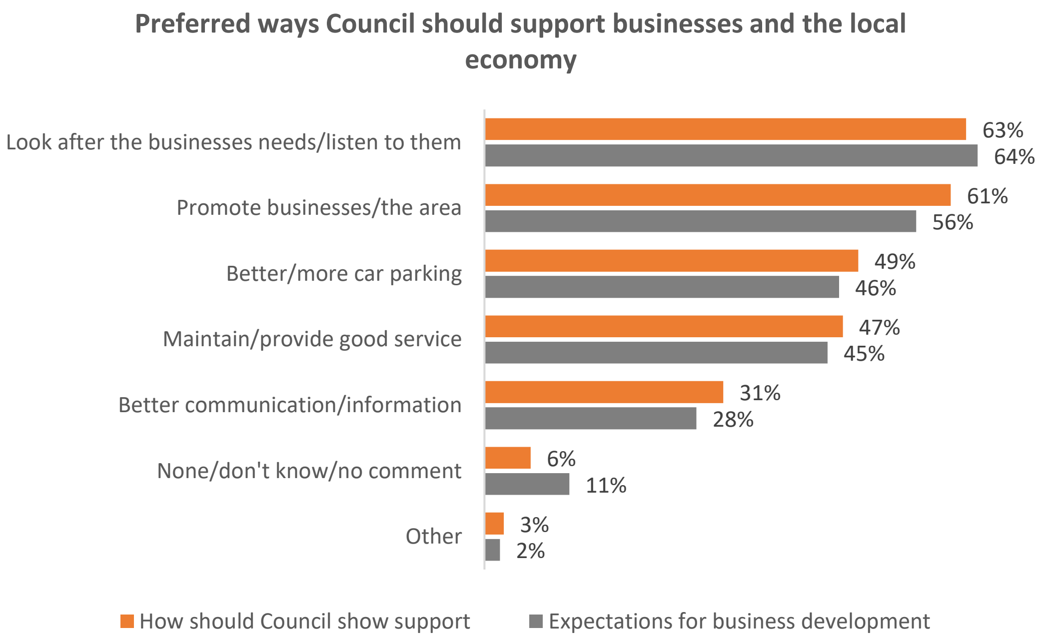
Q26: What are your expectations of the Council in relation to business development within the Council area? Please choose all that apply. (Multiple response)

There would appear to be a greater expectation that the Council will assist businesses this year compared to the last survey with 89% nominating how Council could help compared to only 82% in 2019. 64% of respondents expect the Council to look after their business needs / listen to them followed by 56% expecting Council to promote businesses / the area. Car parking was the third most frequently cited expectation by 46% of those who have expectations.

Business development expectations	2009	2011	2013	2017	2019	2021
Look after the business needs / listen to them	28%	20%	23%	26%	42%	64%
Promote businesses / the area	7%	14%	19%	25%	45%	56%
Better / more car parking	4%	10%	6%	17%	33%	46%
Maintain / provide good service	8%	9%	10%	10%	33%	45%
Better communication / information	4%	10%	10%	27%	30%	28%
Other (specify)	11%	3%	3%	3%	10%	2%
No / don't know / no comment	41%	39%	41%	24%	18%	11%

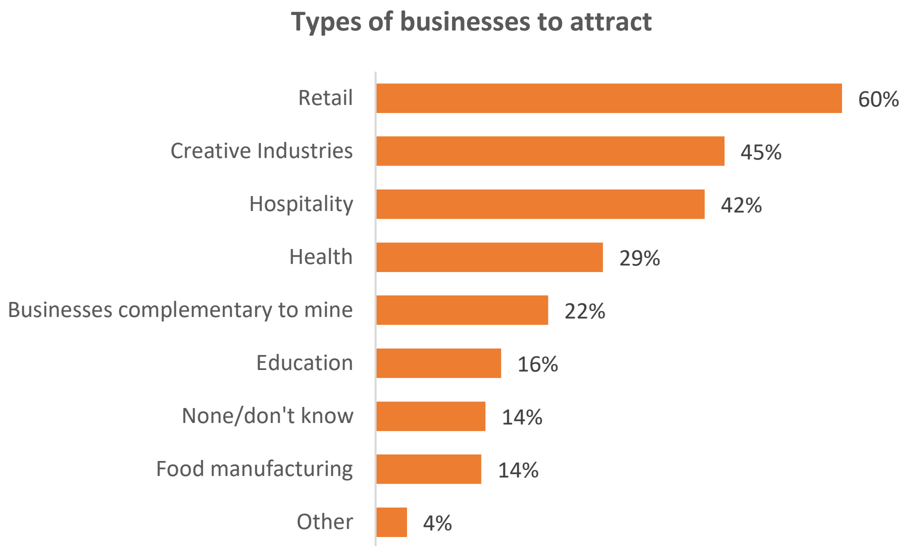
Q27: In what ways would you like the Council to support businesses and the local community? Please choose all that apply. (Multiple response)

When businesses were asked how the Council could support businesses and the local community, looking after the businesses needs and listening to them was most preferred (63% compared to 42% in 2019) and more visible promotion of businesses in the area was mentioned second (56% compared to 45% in 2019).



Q28: What types of business do you think that the Council should be attracting to the Council area? Please choose all that apply. (Multiple response)

Businesses indicated that the primary business-type that Council should attract to the area is retail (60% up from 48% in 2019), creative industries (45% up from 41% in 2019) and hospitality (42% up from 33% in 2019). 'Other' are presented on the following page.

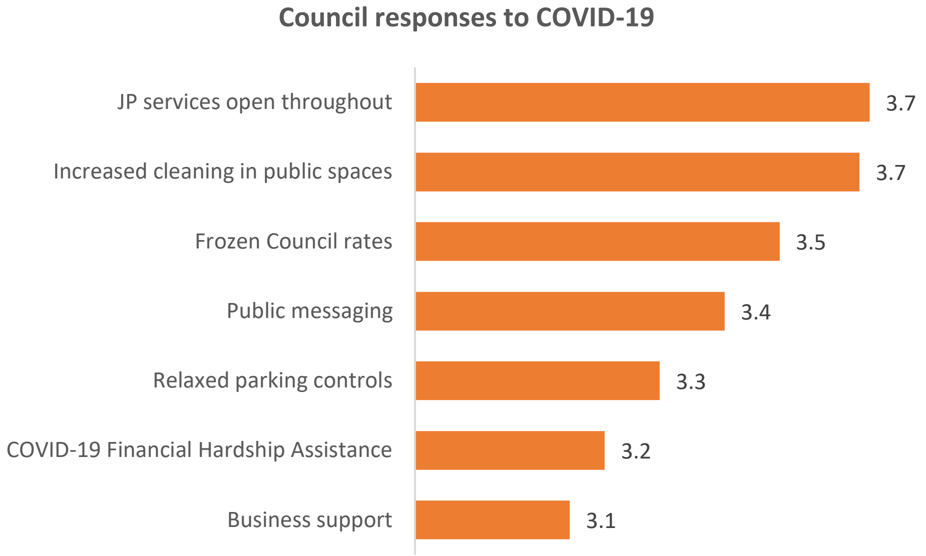


We have analysed the responses by Ward as follows: Retail is the top response for Torrens, West Norwood Kent Town, Kensington and Payneham but second choice for St Peters and Maylands Trinity.

Types of Business to attract (by Ward)		
Torrens Retail 64% Hospitality 40% Health 24% Creative Industries 24%	**St Peters** Creative Industries 50% Retail 50% Hospitality 41.7% Health 33.3%	**West Norwood Kent Town** Retail 61.9% Creative Industries 60.3% Hospitality 39.7%
Kensington Retail 55.8% Hospitality 36.5% Creative Industries 30.8%	**Maylands Trinity** Hospitality 58.1% Retail 58.1% Creative Industries 48.4% Health 35.3%	**Payneham** Retail 64.7% Creative Industries 47.1% Hospitality 41.2%

Response to COVID-19

Q29: On a scale of 1 to 5, where 1 is not very effective and 5 is very effective, how effective do you think the following Council responses to the COVID-19 pandemic were?



This was a new question in 2021. The most effective responses by Council to the COVID-19 pandemic were JP services open throughout (3.7) and increased cleaning in public spaces (3.7) followed by frozen Council rates (3.5).

Final Suggestions

Q30: If you had one suggestion or comment for the Council as to how it could improve its service delivery, what would it be? *(Open ended)*

Communication and Consultation/Responsiveness (77 Responses)

- Be more informative.
- Better communication with small businesses.
- Come visit local businesses personally.
- Make information more available.
- Work with your businesses, find out how you can assist and work together, listen, be open to new ideas, have better empathy and consideration of your constituents.

Traffic Management & Parking (21 Responses)

- Focus on better car parking facilities.
- Parking needs to be longer and more affordable.
- Better parking options for business owners.
- Across from my business Council has allowed the internal development of what used to be a warehouse. Now there are approx. 40 staff that do not have car parking facilities on site so they park their cars on the street in 2-hour zones and leave them there all day because council does not police it even though I have been contacting council for three weeks to do so. The selfish attitude is costing the traders in the area money. Customers are continually complaining now about car parking more than ever before.
- Think more about parking than bike lanes.

Development/Planning issues (16 responses)

- Increase planning and building staff and their skill level.
- Make it easier to find out info for the plan SA services.

Maintenance (5 Responses)

- Attention to the tree roots along median strips.
- More attention to cleaning stormwater drains.
- Keeping footpaths and roads clean. Trim low branches on trees.
- Council needs to listen to business and support their concerns. Council really needs to fix their infrastructure assets. Most major road assets are in good condition, but inner road assets are being neglected. Stop putting band aid fixes on your infrastructure. Parking is a major issue outside The Parade precinct. There is a high demand for longer parking times for on street parking especially around Charles and Clarke St Norwood!
- Improve the street appeal of Magill Road shopping precinct.

Rates/Rent (3 Responses)

- Stop inventing new fees and ways to make business harder.
- Reduce council rates.

Services (2 Responses)

- Pick up of recycling bins.
- Provide hard waste removal service for business.

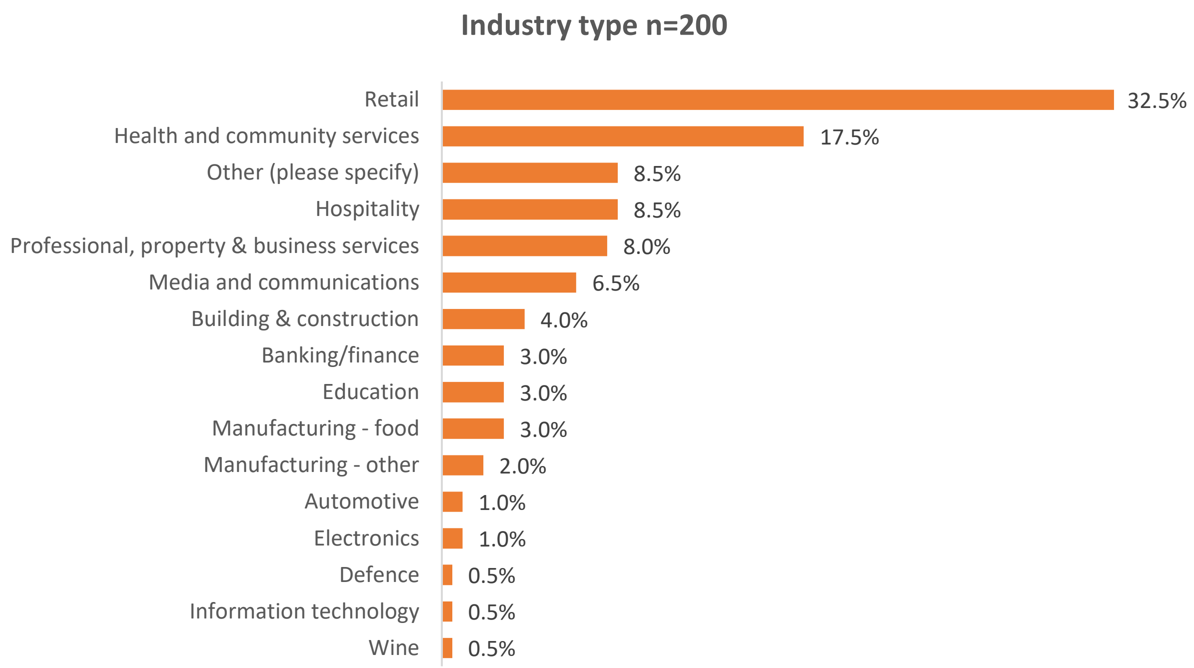
Other responses (15 responses)

- Promote The Parade as a destination entertainment precinct. Increase diversity of restaurants and bars.
- A focus on well-being, environment, sustainability and helping businesses and residents achieve optimal levels of this.
- Police no smoking on The Parade. Enforce it more signs.
- More spaces to hire for people wanting venues for events.
- More security in Kent Town - businesses and staff in the area around 15 Fullarton Road feel unsafe.
- That the Parade and Magill Road are not the only places in NPSP that businesses are located. There are a lot of small eclectic areas in the council area too!
- Effective performance management for underperforming Council staff.

6. Business Demographics

Q31: Which of the following best describes your business? *(Single response)*

Retail businesses were the most dominant demographic for this survey followed by health and community services.



Other responses included:

- Advertising
- Arts
- Barber
- Beauty salon
- Clothing and textile
- Creative / design /advertising
- Energy Efficiency and Solar
- Engineering professional services
- Insurance
- Interior design
- Massages
- Personal care
- Personal care services
- Short term accommodation provider
- Specialist Retail
- Wholesale (2 comments)

Q32: Please select which suburb of the City of Norwood Payneham & St Peters your business operates in. *(Single response)*

The following statistics represent the location of the business respondents in the survey.

Torrens	**12.5%**
Felixstow	0.5%
Marden	7.5%
Royston	4.5%

St Peters	**6.0%**
Joslin	0.0%
St Peters	2.0%
College Park	2.5%
Hackney	1.5%

West Norwood Kent Town	**31.5%**
Norwood (West of Edward)	22.0%
Kent Town	9.5%

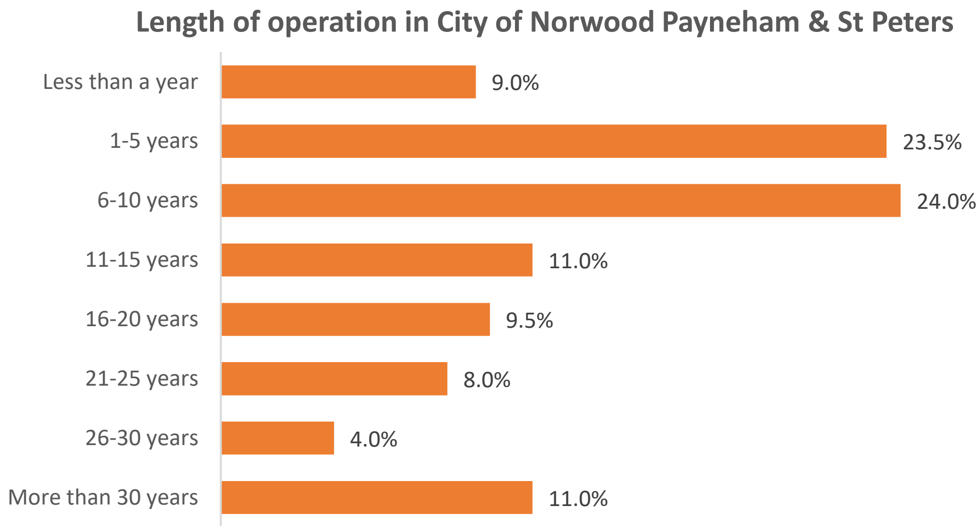
Kensington	**26.0%**
Norwood (East)	23.5%
Kensington	0.5%
Marryatville	1.0%
Heathpool	1.0%

Maylands Trinity	**15.5%**
Trinity Gardens	0.5%
St Morris	3.0%
Firle	0.5%
Payneham South (Coorara / Divett)	0.5%
Evandale	2.0%
Maylands	3.0%
Stepney	6.0%

Payneham	**8.5%**
Glynde	3.5%
Payneham	5.0%
Payneham South	0.0%

Q33: How long has your business been operating within the City of Norwood Payneham & St Peters? *(Single response)*

There were considerably more new businesses surveyed in 2021 (9% compared to 3% in 2019) and significantly more that have operated for between 1 and 10 years (47.5% in 2021 compared to 20% in 2019. 2019 saw many more long term businesses operating for more than 30 years (27% in 2019 compared to 11% in 2021.



7. Recommendations

Focus areas
Car parking is a major issue for many businesses particularly due to the Coles redevelopment and the loss of these car parks for the Norwood Parade. There are also other areas of parking discontent together with parking limits being an issue in attracting customers to the precinct. Interestingly though the percentage of businesses nominating car parking as a disadvantage of operating in NPSP fell from 52% in 2019 to 42% in 2021 but the percentages are clearly much higher than pre-2017.

We recommend the Council puts a focus on improving car parking for businesses going forward.

Priorities for council

Resident	Business
Improving infrastructure Preserving heritage buildings and character areas Environmental sustainability Preserving and planting trees	Car parking Improving infrastructure Environmental sustainability

Improvement in and subsequent communication about the improvements in the following activities will potentially affect future satisfaction scores, however, the key issues businesses care most about are those highlighted above in bold. Improving the following sub-categories will have the greatest impact on overall satisfaction according to the regression analyses.

- Weekly collection of business waste
- The presentation and cleanliness of the Council area
- Attracting and supporting businesses
- The nature of new development within the Council area
- Providing leadership in the local community
- Keeping business informed about current issues

Where possible Council needs to be seen to be supportive of business by listening to businesses' needs and providing programs and networking opportunities.

The survey approach
As has been reported in previous surveys, the questionnaire was lengthy at an average of 16 minutes for completion. It was shorter than the residential survey and we had much less negative feedback from respondent businesses which was good. Having said this though the completion rate online was only 56% (a poor result compared to other Council business surveys) of those that started the survey which meant we had to conduct many more face-to-face interviews than expected.

The Council provided a list of Australian Business Register entities to Intuito but it was discovered that this list was not exclusively within the Council area. The list was refined down to around 800 entities and these were emailed inviting them to complete the Council survey. We had a very poor response to this database as it was not a qualified or opt in list of businesses. Furthermore, people are generally more reluctant than ever to click on links to surveys when they receive the email from an unknown source (such as a research company). We also believe survey fatigue had an impact as the State Government has heavily surveyed businesses during COVID.

In addition to the relatively small number of businesses who completed the survey online, we had interviewers walking in key streets in the Council area (i.e. Norwood Parade, Magill Road, Kensington Road, Fullarton Road Kent Town, etc.) asking business owners/managers to complete the survey.

In future, we recommend that the Council email businesses as you are a known entity and there would be less reluctance by business to click on a link in an email with your branding. We also recommend that some streamlining of questions would be beneficial moving forward.

8. Questionnaire

Intuito is conducting a survey amongst businesses in the City of Norwood Payneham & St Peters on behalf of the Council and would appreciate the opinions of the owner or most senior manager of your business.

The Council values your opinions, and these will be used to improve the services delivered to you by your Council. The survey should take about 10-15 minutes.

We are offering every business that completes the survey a chance to win a cash prize of $500. Please enter your details at the end of the survey if you wish to go into the draw. We hope you enjoy completing this survey and thank you for your time!

Please note your responses will be 100% anonymous and confidential. Intuito Market Research abides by The Research Society's Privacy Code for Market and Social Research. All data gathered will be treated with the strictest confidentiality and will only be used for research purposes. Intuito is a member of The Research Society and works to the highest privacy standards.

Q1: Do you operate a business in the City of Norwood Payneham & St Peters? *(Single response)*

- o Yes
- o No *(thank and terminate)*

Q2: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your level of satisfaction in relation to the waste and recycling services provided by the City of Norwood Payneham & St Peters.

Very dissatisfied				Very satisfied	Don't know
1	2	3	4	5	

- Weekly collection of business waste
- Fortnightly collection of recyclables
- Hard waste collection
- Electronic waste drop-off days
- Fortnightly collection of green organics
- Overall satisfaction

Q3: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your level of satisfaction in relation to the infrastructure assets in the City of Norwood Payneham & St Peters.

Very dissatisfied				Very satisfied	Don't know
1	2	3	4	5	

- Providing and maintaining roads
- Providing and maintaining footpaths
- Availability of car parking within the Council area

- The services provided to businesses
- The presentation and cleanliness of the Council area
- Overall satisfaction

Q4: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your level of satisfaction in relation to the environmental management performance of the City of Norwood Payneham & St Peters.

Very dissatisfied				Very satisfied	Don't know
1	2	3	4	5	

- Responding to climate change
- Water management and use

Q5: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate the performance of the City of Norwood Payneham & St Peters in the area of economic development.

Very dissatisfied				Very satisfied	Don't know
1	2	3	4	5	

- Promoting and supporting tourism
- Promoting and attracting special events
- Attracting and supporting businesses
- Promoting and supporting business precincts (e.g. Glynde, Magill Road, The Parade, etc.)
- Assessment of development applications
- Overall satisfaction

Q6: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your quality of life in the City of Norwood Payneham & St Peters.

Very dissatisfied				Very satisfied	Don't know
1	2	3	4	5	

- Feeling safe in the daytime
- Feeling safe at night
- The ability to become involved in community life and activities
- Level of community spirit
- Access to services and facilities
- The amenity of our major commercial and retail areas
- The nature of new development within the Council area
- Overall satisfaction

Q7: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, please rate your level of satisfaction in relation to the leadership of the City of Norwood Payneham & St Peters.

Very dissatisfied				Very satisfied	Don't know
1	2	3	4	5	

- Council financial management
- Keeping businesses informed about current issues
- Providing leadership in the local community
- Performance of Elected Members (Mayor, Councillors)
- Environmental sustainability
- Overall satisfaction

Q8: On a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate your level of agreement with the following statements in relation to Council.

Strongly disagree				Strongly agree	Don't know
1	2	3	4	5	

- The Council provides convenient and accessible services for businesses
- I think the Council is supportive of local businesses and industries
- The mix of businesses in the business precincts contributes to the prosperity of the area
- The Council area provides the opportunity for new enterprises and local employment
- The Council should promote the area as a centre for creative industries
- The Council should facilitate a local economy, supporting and supported by, its community
- The Council provides sufficient opportunities for community engagement
- There is good communication between businesses and residents

Q9: On a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate your agreement with this statement: I am happy with the balance between Council rates and the services and standard of infrastructure provided. *(This question has been separated from the previous question to allow us to apply logic to the answers and find out why those who rated it low, did so)*

- o 1 - Strongly disagree (Go to Q10)
- o 2 (Go to Q10)
- o 3 (Go to Q11)
- o 4 (Go to Q11)
- o 5 - Strongly agree (Go to Q11)
- o Don't know (Go to Q11)

Q10: Which of the following would you prefer? *(Single response)*

- o Council should keep rates as low as possible
- o Maintaining the quality of services and the standard of infrastructure is more important than keeping the rates low
- o Don't know / not sure
- o Other (please specify) ______________________________

Q11: Do you think there are any advantages of operating a business within the Council area? *(Single response)*

- o Yes (go to Q12)
- o No (go to Q13)
- o Don't know / not sure (go to Q13)

Q12: What are the advantages of operating a business within the Council area? *(Open ended)*

Q13: Do you think there are any disadvantages of operating a business within the Council area? *(Single response)*

- o Yes (go to Q14)
- o No (go to Q15)
- o Don't know / not sure (go to Q15)

Q14: What are the disadvantages of operating a business within the Council area? *(Open ended)*

Q15: When was the last time you had any dealings with Council staff? *(Single response)*

- o Within the last week (Go to Q16)
- o Within the last month (Go to Q16)
- o Within the last three months (Go to Q16)
- o Within the last six months (Go to Q16)
- o Within the last year (Go to Q16)
- o Within the last two years (Go to Q16)
- o Within the last five years (Go to Q16)
- o More than five years ago (Go to Q16)
- o Can't recall (Go to Q16)
- o Never (Go to Q17)

Q16: And how satisfied were you with the responsiveness of the staff member?

Very dissatisfied				Very satisfied	Don't know/NA
1	2	3	4	5	

- Speed of response

- Reacted positively
- Resolution of issue
- Overall satisfaction

Q17: When was the last time you had any dealings with the any of the Elected Members (Mayor and Councillors)? *(Single response)*

- o Within the last week (Go to Q18)
- o Within the last month (Go to Q18)
- o Within the last three months (Go to Q18)
- o Within the last six months (Go to Q18)
- o Within the last year (Go to Q18)
- o Within the last two years (Go to Q18)
- o Within the last five years (Go to Q18)
- o More than five years ago (Go to Q18)
- o Can't recall (Go to Q18)
- o Never (Go to Q19)

Q18: And how satisfied were you with the responsiveness of the Elected Member?

Very dissatisfied				Very satisfied	Don't know/NA
1	2	3	4	5	

- Speed of response
- Reacted positively
- Resolution of issue
- Overall satisfaction

Q19: How would you prefer to receive information about the Council's services and activities? Please choose all that apply. *(Multiple response)*

- ☐ Council's "YourBusiness" email
- ☐ At community events
- ☐ Council's website
- ☐ Precinct website (e.g. Magill Road, The Parade, etc.)
- ☐ Social media pages
- ☐ Precinct networking events
- ☐ LookEast publication (Council newsletter published 6 monthly)
- ☐ Other Council publications / fliers / mailouts
- ☐ Council Libraries / Library Noticeboards
- ☐ Contact with Council staff (at customer service centre, phone call, etc.)
- ☐ Word of mouth (friend / family / colleagues)
- ☐ Adelaide East Herald
- ☐ Do not find out information about the Council's services and activities
- ☐ Other (please specify) ______________________________

Q20: Has your business been involved in any of the following Council-run events in the last 3 years? Note that these events aren't necessarily current or ongoing. Please choose all that apply. *(Multiple response)*

- ☐ Fashion on Parade / Spring Shopping Day
- ☐ Food Secrets of Glynde Stepney bus tour
- ☐ Twilight Carols
- ☐ St Peters Fair
- ☐ Norwood Tour street party (Tour Down Under)
- ☐ Business workshop
- ☐ Business networking
- ☐ Eastside Business Awards
- ☐ Food Secrets at the Green
- ☐ Art on Parade
- ☐ None of these
- ☐ Other (please specify) ______________________________

Q21: In your opinion, what are the three major issues that Council should be addressing in the next three years? Please rank the below issues in order of importance

- Preserving heritage buildings and character areas
- Preserving and planting trees
- Issues with street trees (roots, leaf litter)
- Preserving / increasing areas of open space
- Environmental sustainability
- Waste management / recycling / reduction
- Improving infrastructure (roads, footpaths, drains etc.)
- Improving access to information from Council
- Access to support services
- Urban design / planning issues
- Car parking
- Community health and wellbeing

Q22: If you were to participate in a Council engagement session on a project or program (e.g. workshop, information night, etc.) which of the following days and times would best suit you? Please choose all that apply. *(Multiple response)*

- ☐ Times - morning (between 9 am to 12 pm)
- ☐ Times - afternoon (between 12 pm and 4 pm)
- ☐ Times - evening (between 7 pm and 9 pm)
- ☐ Days - Weekdays
- ☐ Days - Weekends
- ☐ None of the above – I do not want to participate
- ☐ All the above / no preference

Q23: Does your business sponsor or support any community activities or organisations within the Council area? *(Multiple response)*

- ☐ Charities
- ☐ Schools
- ☐ Social / service clubs
- ☐ Cultural groups (e.g. music, entertainment)
- ☐ Sporting clubs / groups
- ☐ Council events / activities
- ☐ Don't know / not sure
- ☐ None of these
- ☐ Other (please specify) ______________________________

Q24: Are you aware that the Council has an economic development team to assist businesses? *(Single response)*

- o Yes (go to Q25)
- o No (go Q26)
- o Don't know / not sure (go to Q25)

Q25: Have you been in contact with the economic development coordinators, Stacey and Tyson? Do you have any feedback regarding this? *(Multiple response)*

- o No
- o Feedback (please specify) ______________________________

Q26: What are your expectations of the Council in relation to business development within the Council area? Please choose all that apply. (Multiple response)

- ☐ Look after the businesses needs / listen to them
- ☐ Maintain / provide good service
- ☐ Promote businesses / the area
- ☐ Better communication / information
- ☐ Better / more car parking
- ☐ Don't know / not sure
- ☐ Other (please specify) ______________________________

Q27: In what ways would you like the Council to support businesses and the local community? Please choose all that apply. (Multiple response)

- ☐ Look after the businesses needs / listen to them
- ☐ Maintain / provide good service
- ☐ Promote businesses / the area
- ☐ Better communication / information
- ☐ Better / more car parking
- ☐ Don't know / not sure
- ☐ Other (please specify) ______________________________

Q28: What types of business do you think that the Council should be attracting to the Council area? Please choose all that apply. (Multiple response)

- ☐ Retail
- ☐ Hospitality
- ☐ Education
- ☐ Health
- ☐ Food manufacturing
- ☐ Creative industries (e.g. design, visual arts, performing arts, film, etc.)
- ☐ Businesses complementary to mine
- ☐ Don't know / not sure
- ☐ Other (please specify) ________________________________

Q29: On a scale of 1 to 5, where 1 is not very effective and 5 is very effective, how effective do you think the following Council responses to the COVID-19 pandemic were?

Not at all effective			Extremely effective		Don't know
1	2	3	4	5	

- Increased cleaning in public spaces
- Business support
- Frozen Council rates
- COVID-19 Financial Hardship assistance
- Relaxed parking controls
- JP services open throughout
- Public messaging
- None of these
- Other (please specify) ________________________________

Q30: If you had one suggestion or comment for the Council as to how it could improve its service delivery, what would it be? *(Open ended)*

Q31: Which of the following best describes your business? *(Single response)*

- o Agriculture
- o Automotive
- o Banking / finance
- o Building and construction
- o Defence
- o Education
- o Electronics
- o Health and community services

- Hospitality
- Information technology
- Manufacturing – food
- Manufacturing – other
- Media and communications
- Professional, property and business services
- Retail
- Science and technical services
- Transport and storage
- Wine
- Other (please specify) ________________________________

Q32: Please select which suburb of the City of Norwood Payneham & St Peters your business operates in. *(Single response)*

Torrens Ward

- Felixstow
- Marden
- Royston Park

St Peters Ward

- Joslin
- St Peters
- College Park
- Hackney

West Norwood Kent Town Ward

- Norwood (West of Edward)
- Kent Town

Kensington Ward

- Norwood (East)
- Kensington
- Marryatville
- Heathpool

Maylands Trinity Ward

- Trinity Gardens
- St Morris
- Firle
- Payneham South (Coorara / Divett)
- Evandale
- Maylands
- Stepney

Payneham Ward

- Glynde
- Payneham
- Payneham South

Other (please specify) ________________________________

Q33: How long has your business been operating within the City of Norwood Payneham & St Peters? *(Single response)*

- Less than a year
- 1-5 years
- 6-10 years
- 11-15 years
- 16-20 years
- 21-25 years
- 26-30 years
- More than 30 years

Q34: If you would like to be entered in the draw to win $500 cash please provide your name, business name, email address and a contact phone number. Your details will not be linked to your answers nor used for any other purpose beyond this competition.

Your name ________________________________

Business name ________________________________

Email address ________________________________

Phone number ________________________________

Terms and Conditions: Entry into the Intuito $500 cash prize draw is by completion of the business survey either online or in person. Entries open 1st November, 2021 and closes 30th November, 2021. The draw will take place on 6th December, 2021. All entries will be via the survey from Intuito. All entries will be automatically logged into a database of entries and assigned a number from 1 to X, with X being the total number of entries received to date. One random number between 1 and X, with X being the total number of entries received to date, will then be generated using the random number generator at www.random.org. The number generated will be matched to the corresponding numbers in the database of entries and this entry will be deemed the winner. The total prize pool is $500. The winner will be notified personally by email and phone. The prize will be sent to the winner's nominated address via Australia Post or internet banking. Insurance is at the winner's discretion and cost. The promoter is Intuito Pty Ltd, 2/39 Clarke Street, Norwood SA 5067. Neither the promoter nor its agencies will be liable for any loss or damage whatsoever which is suffered (including but not limited to indirect, consequential or economic loss) or for personal injury suffered or sustained by association with the use of this prize, except for any liability which cannot be excluded by law.