

SRV Community Research – 2023

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WILLOUGHBY CITY COUNCIL

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Research Objectives

Willoughby City Council is considering a single-year Special Rate Variation (SRV) option to apply in the 2024/2025 rates year. Council commissioned Micromex to conduct a mixed-mode telephone and online survey with residents – the results of that survey are provided in this Report.

Separate to the Micromex research, Council conducted their own, similar, opt-in online community engagement – results of this are not included in this Report.

Objectives (Why?)

- Identify community awareness of Council's exploration of a Special Rate Variation
- Determine level of support for each of the proposed options
- Identify the overall preference out of 4 proposed options

Sample (How?)

- Mixed mode approach to achieve a more representative sample:
    - Telephone survey (landline N = 63 and mobile N = 187) to N = 250 residents
    - Online survey N = 169
- Greatest margin of error +/- 4.9% at the 95% confidence level

Timing (When?)

- Fieldwork conducted 3rd – 15th October 2023

Methodology and Sample

Sample selection and error

A total of 250 resident phone interviews were completed. 222 were chosen by means of a computer based random selection process using SamplePages, Lead Lists and Australian Marketing Lists. The remaining 28 respondents were 'number harvested' via face-to-face intercept at Chatswood Train Station and Northbridge.

The remaining 169 online sample was sourced from the Micromex Community Panel and Octopus Group sample.

This mixed-mode approach provided a cost-effective methodology – and also helped us capture the views of harder-to-reach cohorts, such as younger residents and non-ratepayers.

A total sample size of 419 residents provides a maximum sampling error of plus or minus 4.9% at 95% confidence. This means that if the survey was replicated with a new universe of N=419 residents, 19 times out of 20 we would expect to see the same results, i.e. +/- 4.9%. For example, an answer such as 'yes' (50%) to a question could vary from 45% to 55%.

The final sample of 419 respondents was weighted by Willoughby LGA age and gender population statistics based on the 2021 ABS Census data to reflect the population profile.

Interviewing

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

Data analysis

The data within this report was analysed using Q Professional.

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

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

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

Ratings questions

The Unipolar Scale of 1 to 5 was used in all rating questions, where 1 was the lowest support and 5 the highest support.

Top 3 (T3) Box: refers to the aggregate percentage (%) score of the top three scores for satisfaction or support. (i.e. somewhat supportive, supportive & very supportive). We refer to T3 Box support in order to express moderate to high levels of support in a non-discretionary category.

Ranking question

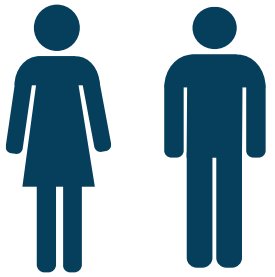
A forced preference ranking question was also applied, where residents had to rank the four options from 1 to 4.

Micromex LGA Benchmark

Micromex has developed SRV Benchmarks using normative data from 36 unique councils, more than 40 surveys and over 18,000 interviews since 2012.

Sample Profile – Weighted Data

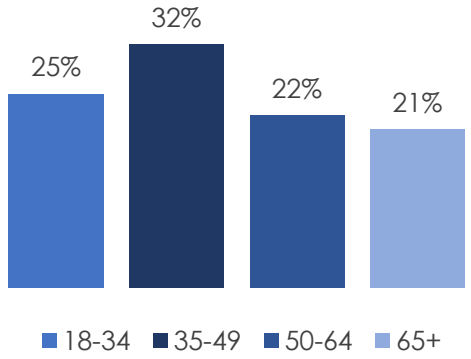
Gender



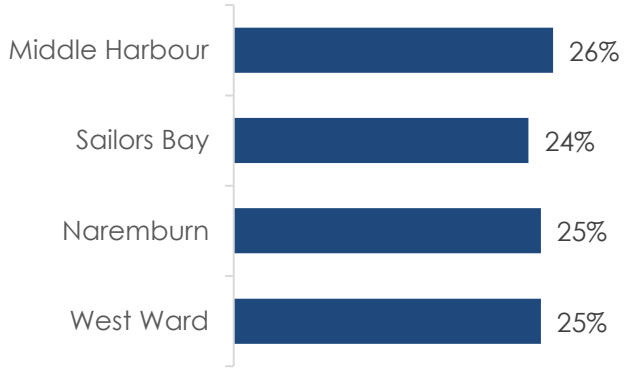
Female 47%

Male 53%

Age



Ward



Ratepayer status
(Multiple responses possible)



Residential ratepayer 78%

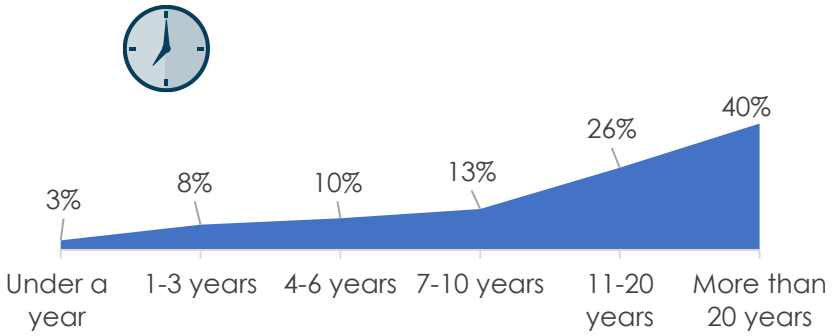


Business ratepayer* 2%

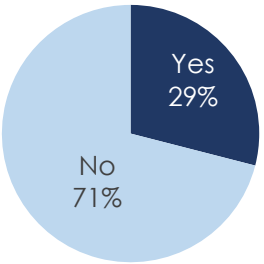


Don't pay residential rates 22%

Time lived in the area



Speaks another language other than English at home



Base: N = 419

* Responses add to more than 100% as a respondent could pay both residential and business rates. See Appendix 2 for analysis of business ratepayers

Summary Findings



Results in Summary: Key Findings

Summary

- Nearly 50% of residents indicated that they were aware of the SRV – primarily informed by Council's Brochure. This level of awareness exceeds our metro benchmarks.
- There is little appetite for a service reduction - Almost three-quarters (74%) of the community preferred some level of SRV, with 41% of the community indicating a preference for a 15%+ increase (Option 3 or 4).
- Main reasons for the preference for some level SRV were –
    - Maintain service levels
    - Affordability of the increase option
    - Council needs the increase/only solution
    - Upgrading services, facilities and infrastructure
    - Prevent service decline
- Those rejecting an SRV, who have a first preference to maintain the rate peg level of 3.5%, did so because of cost concerns.



Results in Summary: Snapshot

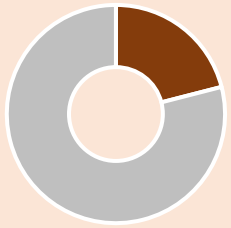


47%

Were aware that Willoughby Council was exploring community sentiment on various rate options prior to the call, above the Micromex benchmark of 34%.

The large majority of residents were informed of the SRV via letter/brochure in the post from Council.

OPTION 1 – REDUCE SERVICES - NO SRV



38% are at least somewhat supportive of this option

26% identified this as their FIRST preference

Main reasons for preference:

- Don't want an increase/can't afford/increase too high
- Council should seek alternatives for generating revenue/leave rates as is
- Issues with Council actions

OPTION 2 – MAINTAIN SERVICES - 12% INCREASE



72% are at least somewhat supportive of this option

33% identified this as their FIRST preference

Main reasons for preference:

- Maintain service levels
- Affordable option
- Prevent service decline

OPTION 3 – INCREASE SERVICES - 15% INCREASE



65% are at least somewhat supportive of this option

26% identified this as their FIRST preference

Main reasons for preference:

- Upgrading services, facilities and infrastructure
- Affordable option
- Council needs the increase/only solution

OPTION 4 – INCREASE SERVICES + INFRASTRUCTURE - 20% INCREASE



53% are at least somewhat supportive of this option

15% identified this as their FIRST preference

Main reasons for preference:

- Upgrading services, facilities and infrastructure
- Council needs the increase/only solution
- Maintain service levels



Section One

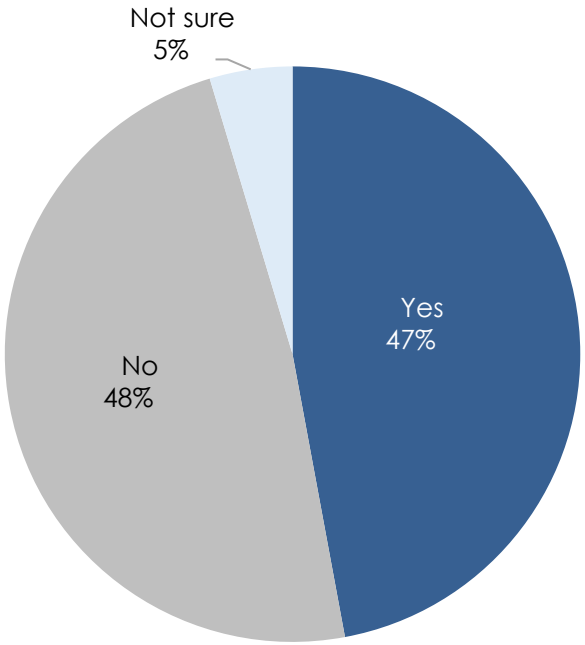
Awareness of the Special Rate Variation

This section examines respondents' awareness of the SRV and how they were informed of Council's means to seek feedback.

Awareness of the Special Rate Variation

Prior to completing the survey, just under half of respondents were aware that Council was exploring various rate rises (47%). This is well above the Micromex metropolitan benchmark of 34%, which is an encouraging result given that the Council commenced its communications campaign in late September and the survey was conducted from October 3-15, 2023.

Awareness was significantly lower for those aged 18-34, non-ratepayers, and those who have lived in the area for 10 years or less.



Base: N = 419

	Overall	Ratepayer Status	
		Ratepayer	Non-ratepayer
Yes	47%	57%	10%
No	48%	40%	81%
Not sure	5%	4%	9%
Base	419	332	87

	Willoughby City Council	2023 LGA Benchmark - Metro
Yes	47%↑	34%
Base	419	4,453

↑↓ = Significantly higher/lower compared to the benchmark

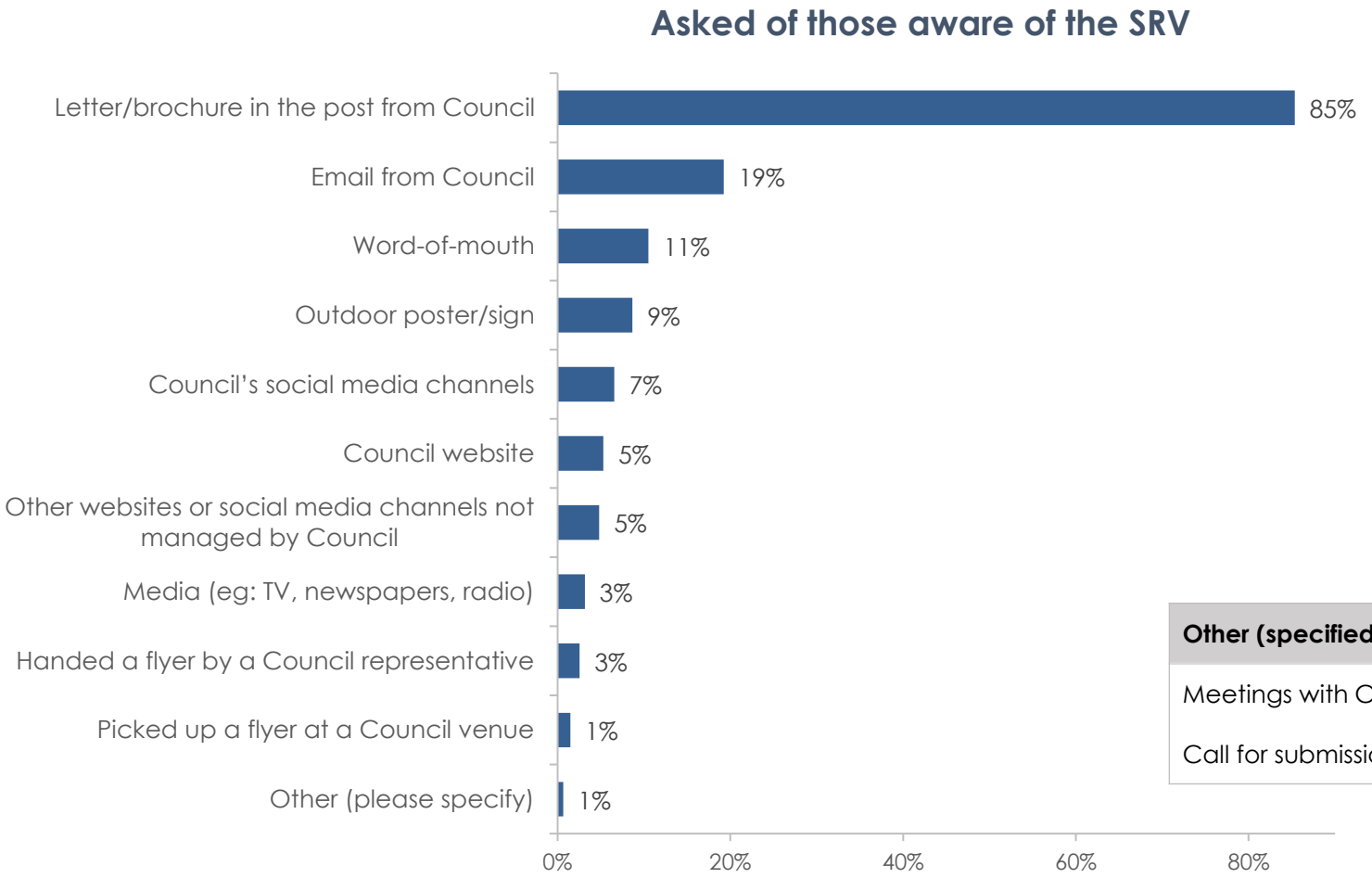
	Overall	Gender		Age				Time lived in area			Ward			
		Male	Female	18-34	35-49	50-64	65+	10 years or less	11- 20 years	More than 20 years	Middle Harbour	Naremburn	Sailors Bay	West Ward
Yes	47%	46%	49%	14%	44%	63%	76%	22%	51%	66%	45%	42%	52%	49%
No	48%	49%	47%	78%	50%	37%	21%	69%	44%	33%	48%	53%	45%	47%
Not sure	5%	5%	4%	7%	6%	1%	3%	8%	6%	1%	7%	5%	3%	4%
Base	419	198	220	106	133	94	86	142	109	169	110	101	104	104

Q4a. Prior to this call, were you aware that Council was exploring community sentiment on various rate rise options?

A significantly higher/lower level of awareness (by group)

Means of Learning About the SRV

Of those that were aware of the SRV prior to the call, a letter or brochure in the post from Council was the most effective method of informing residents (85%), followed by email from Council (19%).



Other (specified)	Count
Meetings with Councillors	1
Call for submissions	1

Base: N = 197

Q4b. How were you informed that Council was seeking community feedback on rate rise options?

See Appendix 3 for prompted options by demographics





Section Two

Support and Preference

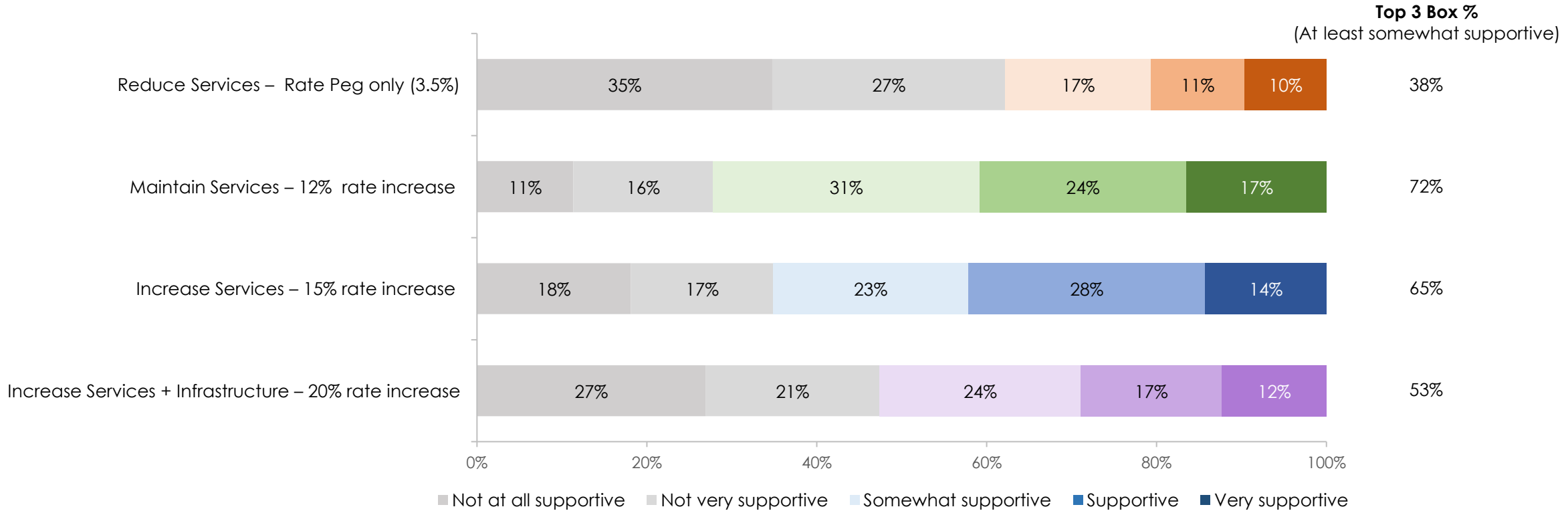
This section explores overall preferences by having residents rank the 4 options and ask for the reasoning for their first preference. As part of the methodology and before residents ranked preferences, they were read a detailed explanation of each of the 4 options, and were asked to rate their support for each option on a 5-point scale.

Full scripts that were used in the research are provided in Appendix 1.

Introduction: Support Levels For Each Option

As a part of the survey methodology, residents were given an explanation of each rate variation option, with half of residents given options low to high and half high to low (to reduce position bias). After the explanation of each option, residents were asked to rate their support for each option on a 5-point scale. The primary purpose of this approach is to ensure that residents are fully informed and considerate of each option before asking them to rank the options in order of preference. See Appendix 1 for the outline of explanations given and support levels by demographics.

Looking at the proportion of residents that are at least somewhat supportive, the 12% 'Maintain Services' was the most supported rate variation, followed closely by the 15% 'Increase Services' option.



Base: N = 419

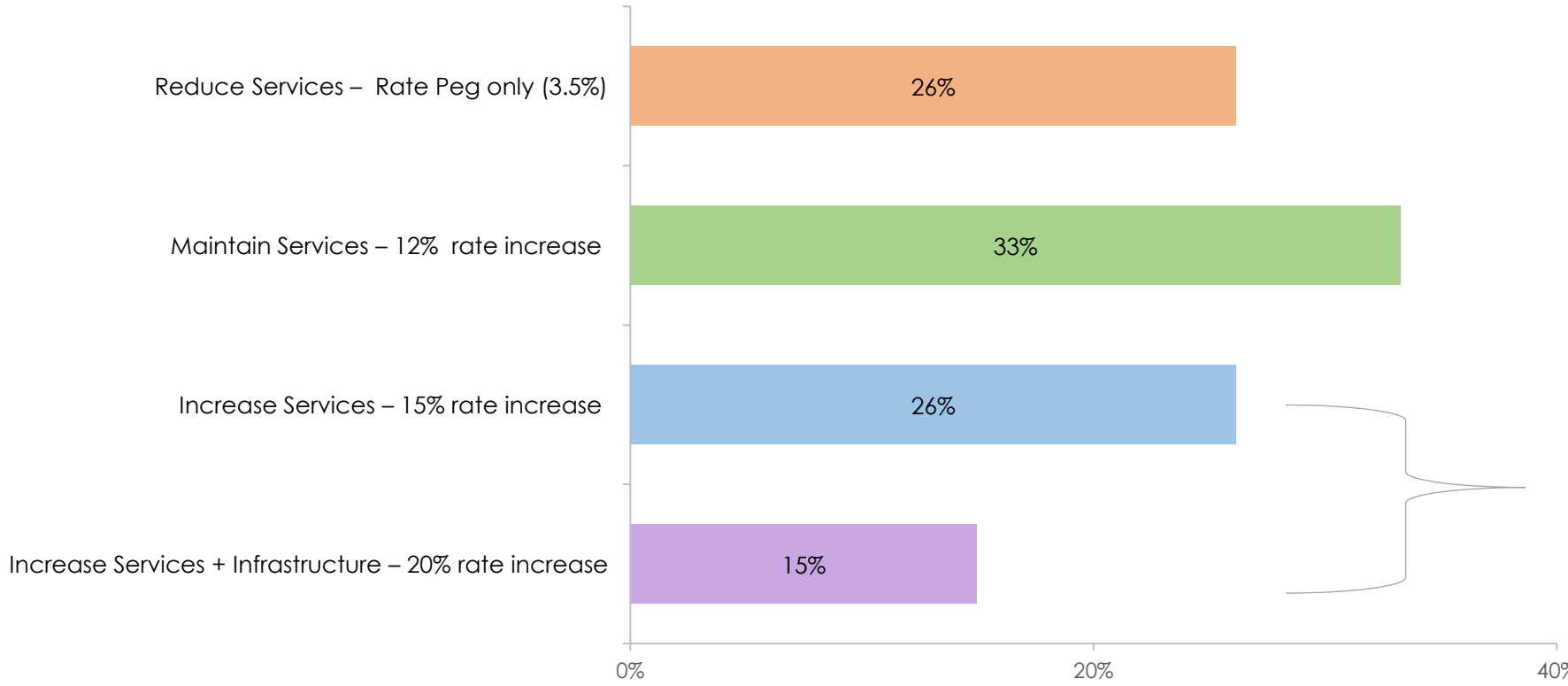
Q2a/b/c/d. How supportive, if at all, are you of Council proceeding with this '…' option?

See Appendix 1 for support levels by demographics

SRV Preference – First Preference

Overall, 74% of residents had a first preference for some form of SRV, whereas 26% favoured the rate peg only option as their first preference. Looking across SRV preferences, 33% have a first preference of a 12% rate increase to maintain services, while a total of 41% would like to see an increase of services through either a 15% or 20% rate rise. The proportion of residents that prefer an SRV exceeds the Micromex SRV Metro Benchmark.

Q3a. Please rank the four options in order of preference: First Preference



	Willoughby Resident First Preference (N=419)	Micromex SRV Metro Benchmark* N=(4,055)
Reduce Services – Rate Peg only (3.5%)	26%	31%
Maintain Services – 12% rate increase	33%	31%
Increase Services – 15% rate increase	41%	38%
Increase Services + Infrastructure – 20% rate increase		

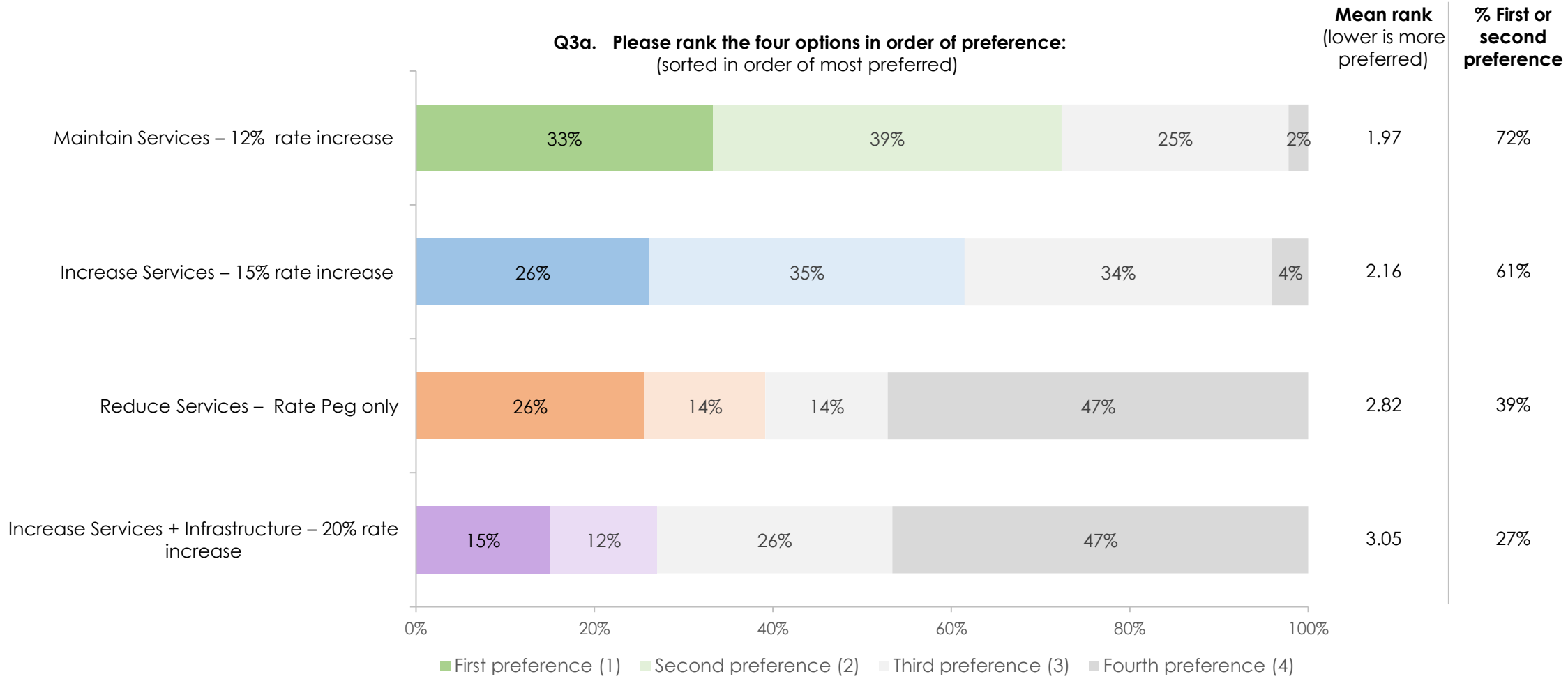
Base: N = 419

Q3a. Please rank the four options in order of preference:

*Note: Micromex SRV Benchmark for preference is based off of a 3 option question type (reduce services, maintain services, increase services)

SRV Preference – All Options Ranked

Now showing all of the rankings given to the 4 options, we see that the 12% and 15% options are the most preferred on a first and second preference basis. By using each option's rank (1,2,3,4) we can create a mean rank that summarises each options preference as an average. Although the 15% and rate peg options are tied on first preference, the 15% option has a much lower mean rank (significantly more preferred on mean score basis).



Base: N = 419

Q3a. Please rank the four options in order of preference:

Mean scores calculated using scale: 1 = first preference, 4 = fourth preference

Preferred Option By Mean Ranking

Looking at the mean preference rank for all 4 options, across awareness and demographics, we see that the 12% rate increase option is the most preferred on average for all demographics, except for residents from Middle Harbour. It is worth noting that in all cases, the 15% option is almost as preferred as the 12% option.

Q3a. Mean preference rank by awareness and demographics
(lower score = more preferred)

Key
- 12% most preferred
- 15% most preferred

First preference %	Overall	Awareness of the SRV		Residential Ratepayer Status	
		Yes	No/ Unsure	Ratepayer	Non-ratepayer
'Maintain Services' – 12% rate increase	1.97	1.96	1.97	1.96	1.99
'Increase Services' – 15% rate increase	2.16	2.11	2.21	2.20	2.01
'Reduce Services' – Rate Peg only	2.82	2.96	2.70	2.76	3.09
'Increase Services + Infrastructure – 20% rate increase	3.05	2.97	3.11	3.08	2.91
Base	419	197	222	328	87

First preference %	Overall	Gender		Age				Time lived in area			Ward			
		Male	Female	18-34	35-49	50-64	65+	10 years or less	11- 20 years	More than 20 years	Middle Harbour	Naremburn	Sailors Bay	West Ward
'Maintain Services' – 12% rate increase	1.97	1.98	1.95	1.99	1.98	1.99	1.89	2.04	1.94	1.92	2.06	1.92	1.90	1.98
'Increase Services' – 15% rate increase	2.16	2.24	2.09	2.25	2.18	2.07	2.13	2.14	2.20	2.16	2.05	2.25	2.30	2.08
'Reduce Services' – Rate Peg only	2.82	2.74	2.90	2.70	2.82	2.83	2.99	2.86	2.73	2.85	2.94	2.55	2.78	3.01
'Increase Services + Infrastructure – 20% rate increase	3.05	3.04	3.05	3.06	3.03	3.10	2.99	2.97	3.12	3.06	2.96	3.28	3.02	2.93
Base	419	198	220	106	133	94	86	142	109	169	110	101	104	104

Mean scores calculated using scale: 1 = first preference, 4 = fourth preference
A significantly higher/lower (by group)

Q3a. Please rank the four options in order of preference:

Preferred Option By Mean Ranking: SRV Acceptors

26% of residents have a first preference for a rate peg only option, however, as this question forces residents to rank every preference option we can expect an inflated preference for the next lowest option (12% increase). If we remove these 26% of responses, we see that there is a slightly higher preference (lower mean rank) for the 15% increase option amongst the remaining 'SRV acceptors' (base is now the 312 respondents who selected one of the three SRV options as their first preference).

Q3a. Mean preference rank by awareness and demographics: SRV
(lower score = more preferred)

Key
- 12% most preferred
- 15% most preferred

First preference %	Overall	Awareness of the SRV		Residential Ratepayer Status	
		Yes	No/ Unsure	Ratepayer	Non-ratepayer
'Maintain Services' – 12% rate increase	1.91	1.94	1.89	1.91	1.92
'Increase Services' – 15% rate increase	1.86	1.84	1.87	1.86	1.83
'Increase Services + Infrastructure – 20% rate increase	2.78	2.67	2.88	2.80	2.71
Base	312	152	160	241	71

First preference %	Overall	Gender		Age				Time lived in area			Ward			
		Male	Female	18-34	35-49	50-64	65+	10 years or less	11- 20 years	More than 20 years	Middle Harbour	Naremburn	Sailors Bay	West Ward
'Maintain Services' – 12% rate increase	1.91	1.91	1.93	1.87	1.94	1.98	1.86	1.99	1.92	1.85	2.04	1.92	1.80	1.94
'Increase Services' – 15% rate increase	1.86	1.94	1.78	1.85	1.88	1.77	1.92	1.85	1.83	1.88	1.73	1.99	1.90	1.78
'Increase Services + Infrastructure – 20% rate increase	2.78	2.78	2.77	2.82	2.73	2.80	2.79	2.70	2.75	2.86	2.64	3.04	2.73	2.60
Base	312	145	166	73	98	70	70	107	75	129	85	74	72	80

Q3a. Please rank the four options in order of preference:

Mean scores calculated using scale: 1 = first preference, 4 = fourth preference

Top Reason for First Preference

Respondents were asked an open-ended question about why they selected the first preference they did. Their verbatim comments have been coded into themes (main themes are provided in the table below, all themes are provided in Appendix 3):

- For those who chose the rate peg only option as their first preference, 45% selected it because other options are not affordable.
- Top reasons for selecting a preference that involved a 12% rate increase surrounded concerns for maintaining service levels and that it is affordable.
- Those who chose a 15% and 20% rate increase option want to see services, facilities and infrastructure upgraded.

The following slides explore reasons for each preference in detail.

	Rate Peg only	12% rate increase	15% rate increase	20% rate increase
Doesn't want an increase/can't afford/increase too high	45%	16%	7%	4%
Affordable option	9%	23%	25%	10%
Maintain service levels	1%	26%	10%	24%
Council needs the increase/only solution	3%	16%	20%	24%
Upgrading services, facilities and infrastructure	0%	4%	26%	39%
Prevent service decline	4%	17%	7%	18%
Ensure rate rise can be afforded by the entire community	7%	16%	13%	2%
Base	107	139	110	63

Q3b. What is your reason for choosing that option as your highest preference?

See Appendix 3 for full list of reasons

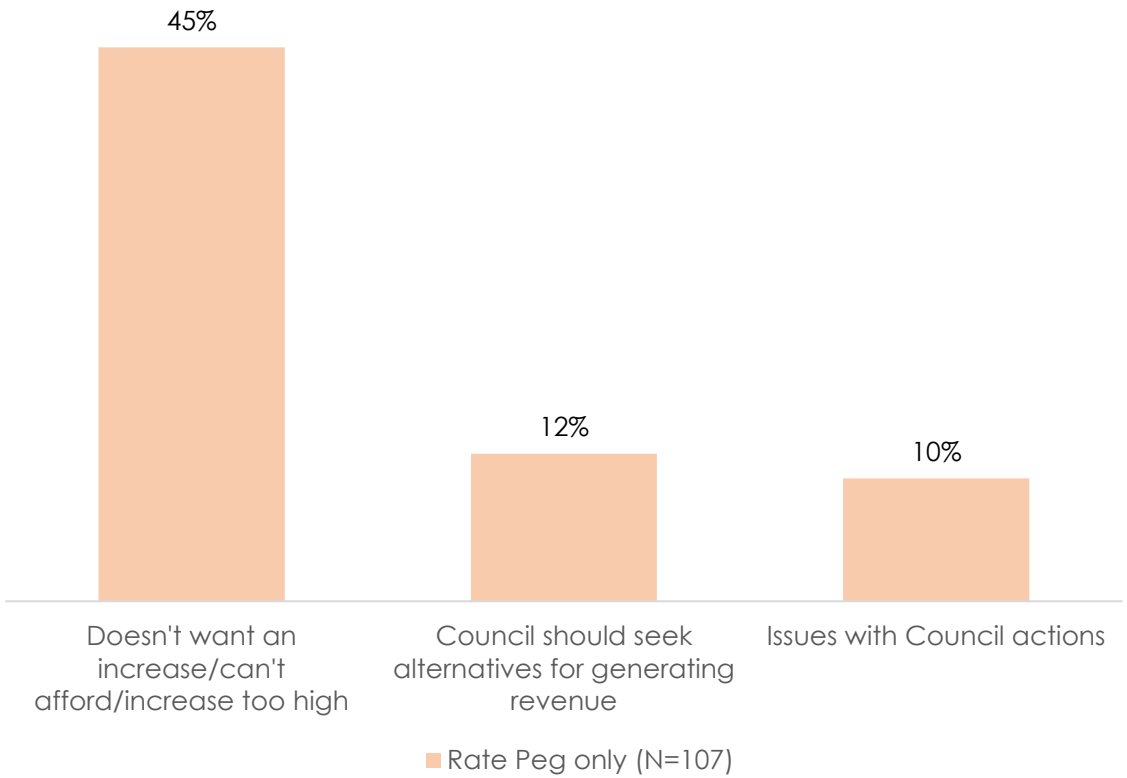
Top 3 Reasons for Rate Peg First Preference

Residents who did not prefer to implement an SRV stated so primarily because of cost concerns, with some suggesting that Council should explore alternative revenue streams.

Reasons for preference: Verbatim examples

- *'Cost of living is rising so not everyone can afford the rate increase.'*
- *'As a business, I can't justify a permanent increase of 10% to my customers so neither should council be able to.'*
- *'Concerned for how people will absorb the rising cost of inflation and interest.'*
- *'More creative thinking within council rather than just increasing rates. Are there better ways of raising money than going to the rate increases?'*
- *'Understand council needs additional funds, but 20% is too much of an increase at once.'*

Most cited preference reasons



Q3b. *What is your reason for choosing that option as your highest preference?*

See Appendix 3 for full list of reasons

Top 3 Reasons for 12% Increase First Preference

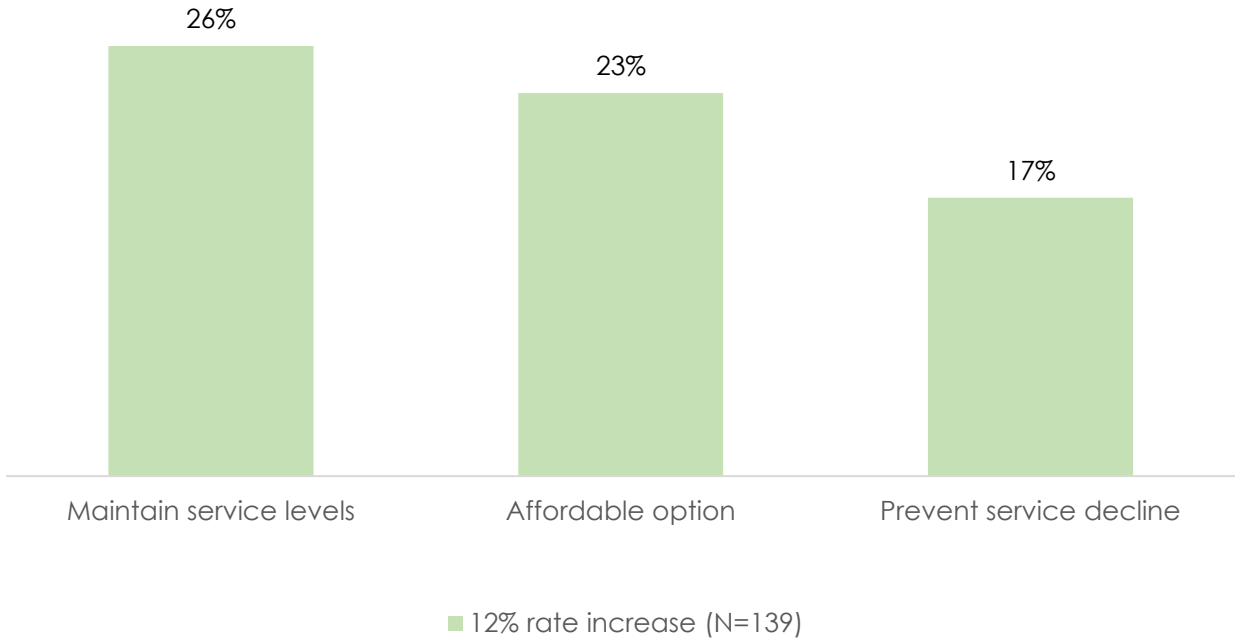
For the 12% increase option, many residents clearly identified with the 'Maintain Services' naming of the increase, while others saw this as the most affordable option to maintain services.



Reasons for preference: Verbatim examples

- *'Best balance between keeping costs low and maintaining services.'*
- *'The quality of services being received currently is adequate and should be maintained so as to keep rates relatively low.'*
- *'It is a good medium that there is hopefully the best outcome without having too much of a rate increase.'*
- *'12% is not a huge increase and is affordable and reasonable amount. the 15% and the 20% is too much of an increase and not necessary.'*
- *'I don't want a reduction in services and community can't afford the proposed higher rates increases.'*

Most cited preference reasons



Q3b. What is your reason for choosing that option as your highest preference?

See Appendix 3 for full list of reasons

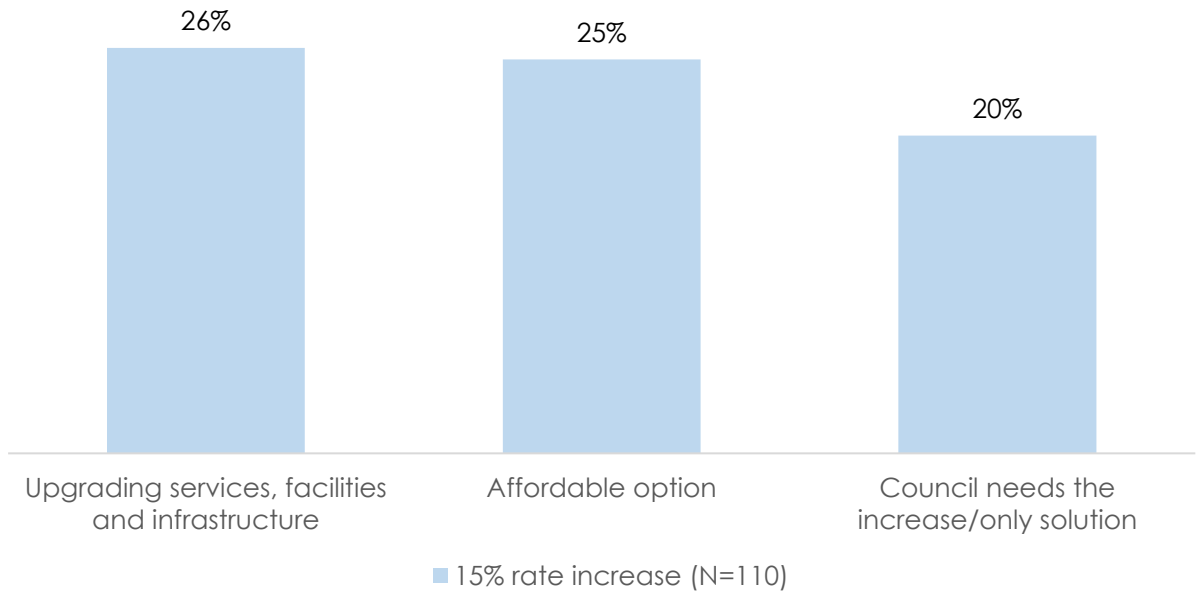
Top 3 Reasons for 15% Increase First Preference

Residents who preferred the 15% increase did so because they want to see upgrades to services/facilities/infrastructure, while many believe this is also an affordable option and an option that Council needs to implement.

Reasons for preference: Verbatim examples

- *'This option has the reasonable and affordable price increase with increased services.'*
- *'Don't want the council going backwards financially or in regards to infrastructure.'*
- *'Maintenance of infrastructure and increase of services is a very high priority with me, even though it will be a bit of a financial sacrifice for me.'*
- *'It's not too much of an increase to be able to maintain and improve upon necessary services and infrastructure.'*
- *'Happy to cover 15% increase in rates, as long as council is using the money efficiently.'*

Most cited preference reasons



Q3b. *What is your reason for choosing that option as your highest preference?*

See Appendix 3 for full list of reasons

Top 3 Reasons for 20% Increase First Preference

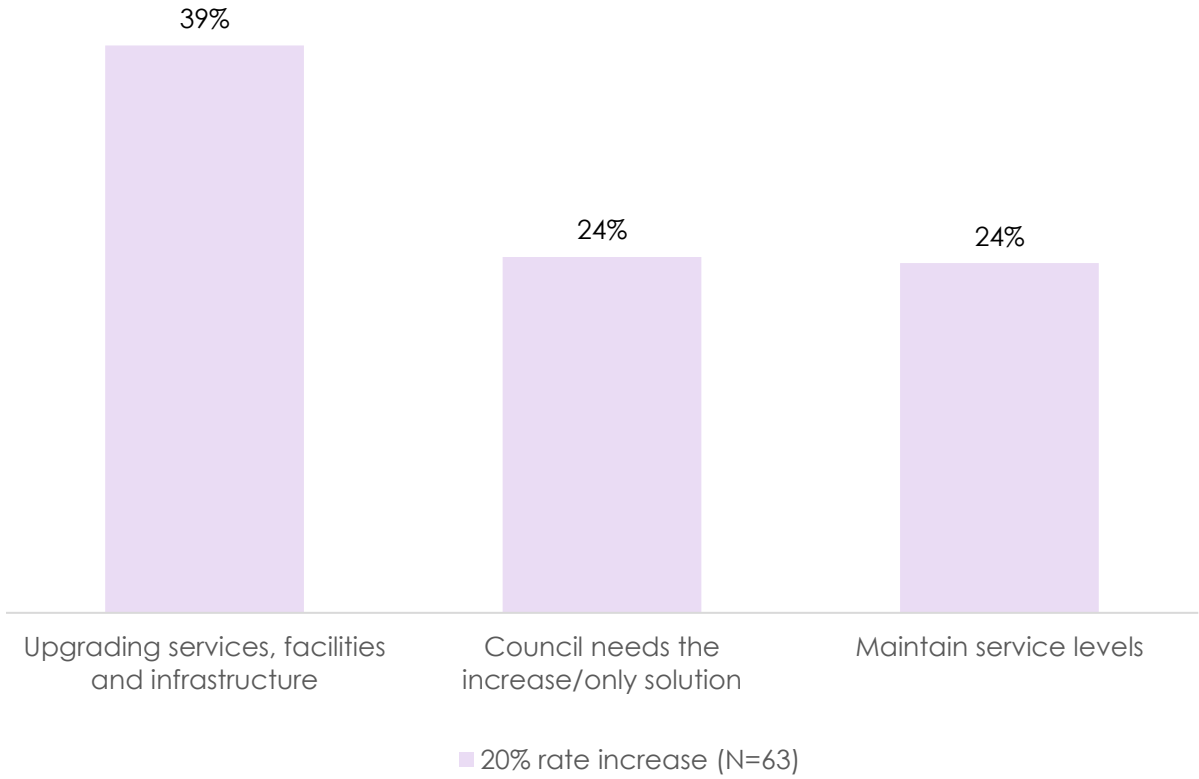
Reasons for preferring the largest SRV option were driven by the desire to get the most from Council, through upgrading services/facilities/ infrastructure. Most of the remaining reasons were that this level of increase is the only solution and is needed to maintain service levels.



Reasons for preference: Verbatim examples

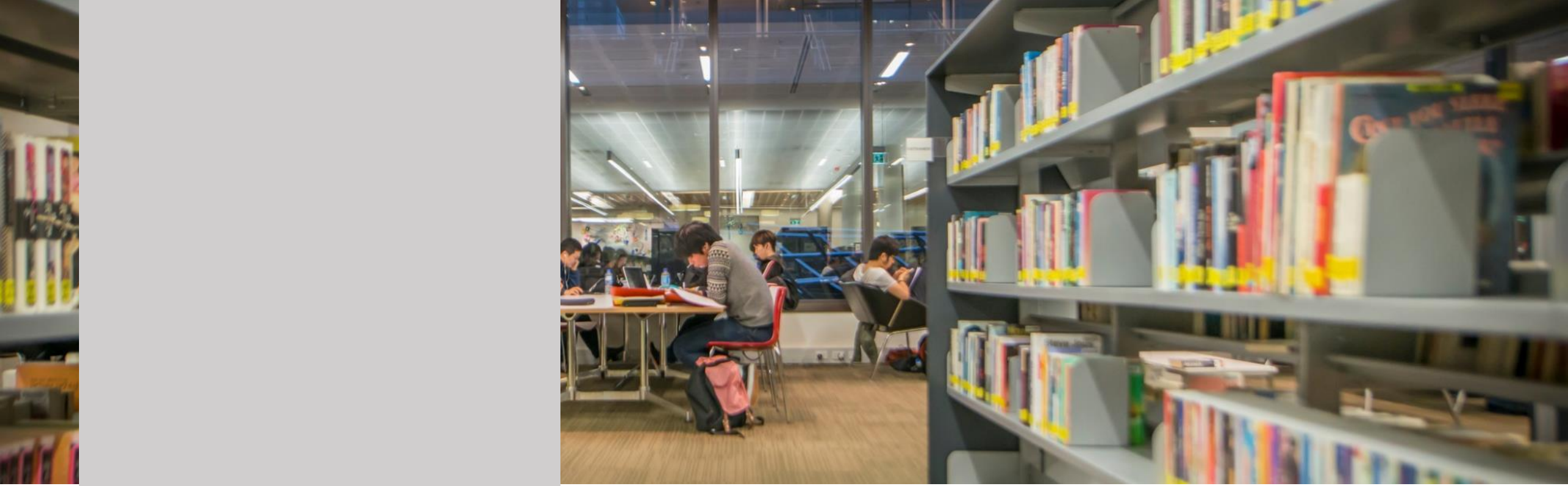
- *'Council offers some great services that add to the fabric and richness of the community. I want to see these things continue.'*
- *'It is important to get back to positive and continue to improve our available facilities.'*
- *'The actual rate rise in dollars for us is not a huge imposition and I believe that the council needs to do more and should be able to do more.'*
- *'Need to keep improving services and infrastructure as the population of the area has increased and we need work on infrastructure which is included in my first preference.'*
- *'Council plays a key role in getting kids off computers and into green spaces by providing them especially bike paths and mountain biking trails etc.'*

Most cited preference reasons



Q3b. What is your reason for choosing that option as your highest preference?

See Appendix 3 for full list of reasons



Appendix 1

Special Rate Variation Options and Support In Detail

As a lead up to asking residents their ranked preference, residents were provided with detailed information of each of the 4 SRV options and asked to rate their support on a 5-point scale.

SRV Concept Statement

Before outlining the details of SRV options, the following introduction was read to respondents:

Willoughby City Council is facing two challenges.

Firstly, due to a growing and increasingly diverse population and rising community expectations, the Council is under more pressure to improve services.

Secondly, Council is finding it more difficult to meet these growth and community expectations, due to a deteriorating financial position linked to a range of unexpected economic events, including $20.6m in COVID-19 pandemic revenue losses and high inflation.

At the same time as these unexpected events, Council's rate revenue has fallen, due to NSW Government rate pegs being set well below inflation levels and the cessation of the Council's 7.3% Infrastructure Levy in 2022. As a result, Council now has the second lowest average residential rates out of the eight councils in Northern Sydney.

Council is already taking a number of measures to address these challenges, such as identifying efficiency improvements and looking for additional revenue sources – and these initiatives will continue.

However, even taking into account these measures, the Council could get into financial difficulty by mid-2025 (if it continues to renew local infrastructure to acceptable levels) and therefore needs to examine rate rise options.

The Council is now seeking feedback on four long-term rate rise options. These options are known as (flip order):

- Reduce Services
- Maintain Services
- Increase Services; and
- Increase Services and Infrastructure

Let's look at the options in more detail:



Option 1: ‘Reduce Services’ – Rate Peg Increase Only:

Residents were provided with the following details regarding Option 1:

For this option, rates would increase in line with the expected NSW Government rate revenue peg of 3.5% (which is available to all councils). In other words, the Council would not apply to the government for a special rate increase.

- The average residential ratepayer who is currently paying $1,088 per year, would pay an extra $38 in the 2024-2025 financial year (or 73 cents a week).
- The average Chatswood Town Centre business ratepayer who is currently paying around $7,803 per year would pay, on average, an extra $273 in the 2024-2025 financial year. Businesses outside the Chatswood Town Centre who are currently paying around $6,524 per year would pay, on average, an extra $228 in the 2024-2025 financial year).

Under this option, because of the low rate increase, the Council would instead balance its budget by reducing services to the value of $2.8m and increasing revenue by $500,000.

The main perceived advantage of this option is that rates will stay low.

The perceived disadvantages include:

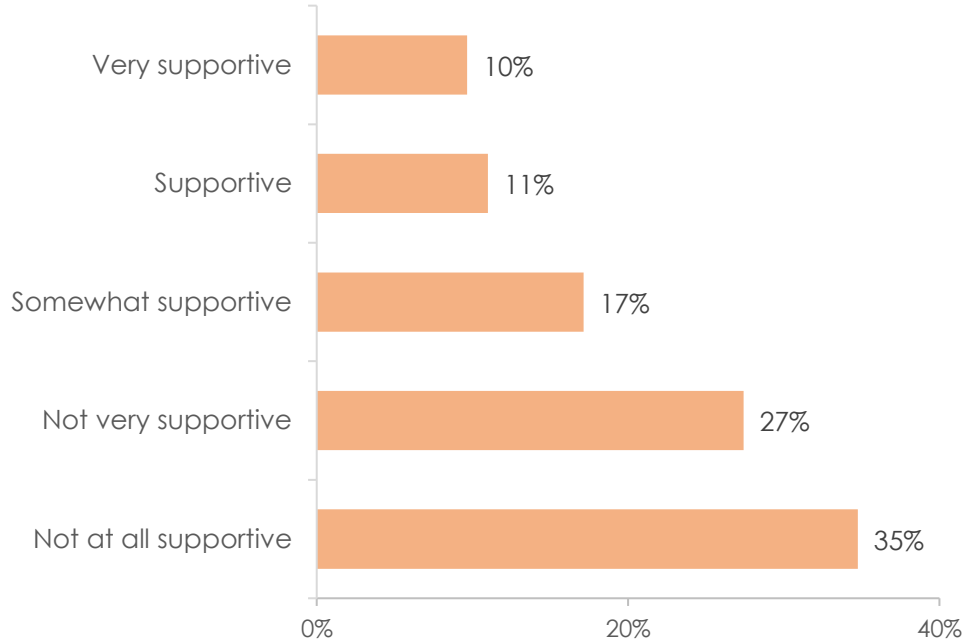
- Overall service reductions, potentially including reduced maintenance and putting at risk the timely renewal of assets
- No ability to accumulate funds for future community services or projects
- No financial buffer to manage future financial shocks or extreme weather events
- Future rate increases above the rate peg are highly likely
- Reduced staff morale, making it more difficult to attract and retain staff



Support for Option 1: 'Reduce Services' – Rate Peg Increase Only

Cumulatively, 38% of residents are at least somewhat supportive of the Rate Peg option, leaving 62% of residents that are not at all supportive. Those not aware of the SRV prior to the call were more likely to commit to the top 3 boxes (44%), in comparison to those aware (30%).

Q2a. Support for 'Reduced Services' Option
(rate peg only: 3.5% increase)



	Overall	Awareness of the SRV		Ratepayer Status	
		Yes	No/ Unsure	Ratepayer	Non-ratepayer
Top 3 Box %	38%	30%	44%	38%	37%
Base	419	197	222	322	87

	Overall	Gender		Age				Time lived in area			Ward			
		Male	Female	18-34	35-49	50-64	65+	10 years or less	11- 20 years	More than 20 years	Middle Harbour	Naremburn	Sailors Bay	West Ward
Top 3 Box %	38%	39%	37%	42%	41%	32%	34%	38%	41%	36%	44%	43%	33%	31%
Base	419	198	220	106	133	94	86	142	109	169	110	101	104	104

Base: N = 419

Q2a. *How supportive, if at all, are you of Council proceeding with this 'Reduced Services' option?*

Scale: 1 = not at all supportive, 5 = very supportive
A significantly higher/lower level of support (by group)

Option 2: ‘Maintain Services’ – 12% Increase:

Residents were provided with the following details regarding Option 2:

This option would involve an increase of 12% in the 2024-2025 financial year, consisting of the rate peg amount of 3.5% and Council applying for a special rate increase of 8.5%. The special rate increase would only apply in 2024-2025, and would be built into the rate base thereafter.

- The average residential ratepayer who is currently paying $1,088 per year would pay an extra $130 in the 2024-2025 financial year, or $2.50 a week.
- The average Chatswood Town Centre business ratepayer who is currently paying around $7,803 per year would pay, on average, an extra $936 in the 2024-2025 financial year. Businesses outside the Chatswood Town Centre who are currently paying around $6,524 per year would pay, on average, an extra $783 in the 2024-2025 financial year).

The main perceived disadvantage of this option is that rates will increase at a level higher than the NSW Government rate peg

The perceived advantages of the option are that the Council will be able to:

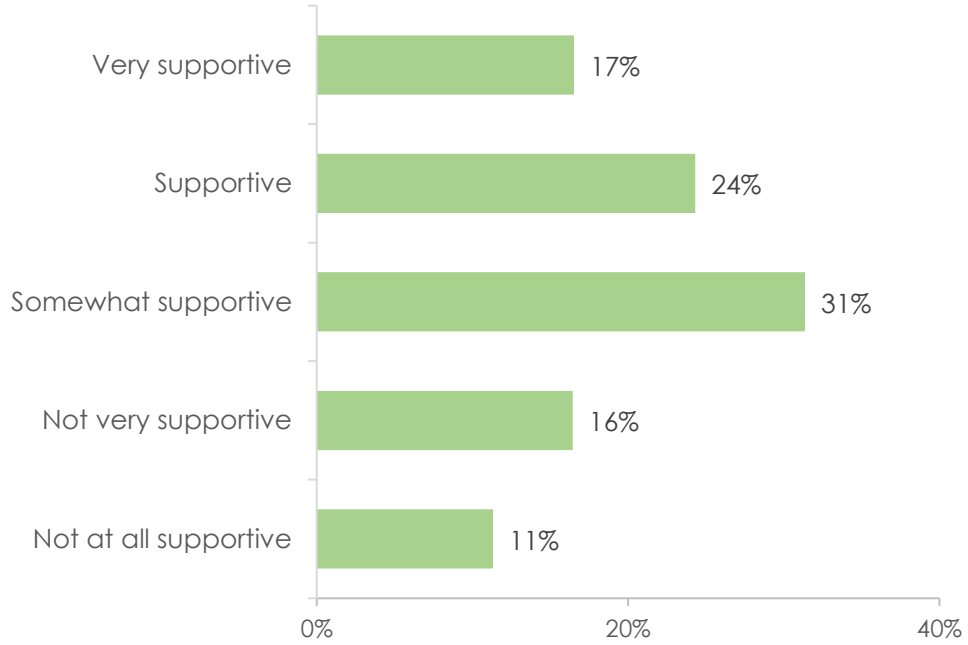
- Recover from the 12.1% inflation increase over the last two years
- Continue to deliver – but not improve upon – highly valued services to the community
- Deliver average annual surpluses of $5.22m, which subject to future financial shocks, could be re-invested in community services and projects
- Increase responsiveness to resident and business enquiries
- Increase Council’s ability to absorb future financial, extreme weather and growth shocks
- Provide capacity to maintain and renew community assets



Support for Option 2: 'Maintain Services' – 12% Increase

Residents had a high level of support for proceeding with the 12% Increase option, seeing 72% of respondents state that they are at least somewhat supportive or very supportive.

Q2b. Support for 'Maintain Services' Option
(12% increase)



	Overall	Awareness of the SRV		Ratepayer Status	
		Yes	No/ Unsure	Ratepayer	Non-ratepayer
Top 3 Box %	72%	72%	73%	71%	77%
Base	419	197	222	322	87

	Overall	Gender		Age				Time lived in area			Ward			
		Male	Female	18-34	35-49	50-64	65+	10 years or less	11- 20 years	More than 20 years	Middle Harbour	Naremburn	Sailors Bay	West Ward
Top 3 Box %	72%	72%	72%	78%	71%	69%	72%	76%	62%	76%	69%	72%	73%	75%
Base	419	198	220	106	133	94	86	142	109	169	110	101	104	104

Base: N = 419

Q2b. How supportive, if at all, are you of Council proceeding with this 'Maintain Services' option?

Scale: 1 = not at all supportive, 5 = very supportive
A significantly higher/lower level of support (by group)

Option 3: 'Increase Services' – 15% increase

Residents were provided with the following details regarding Option 3:

This option would involve an increase of 15% in the 2024-2025 financial year, consisting of the rate peg amount of 3.5% and applying to the NSW Government for a special rate increase of 11.5%. The special increase would apply in 2024-2025, and would be built into the rate base thereafter.

- The average residential ratepayers who is currently paying $1,088 per year would pay an extra $163 in the 2024-2025 financial year, or $3.13 a week.
- The average Chatswood Town Centre business ratepayer who is currently paying around $7,803 per year would pay, on average, an extra $1,170 in the 2024-2025 financial year. Businesses outside the Chatswood Town Centre who are currently paying around $6,524 per year would pay, on average, an extra $979 in the 2024-2025 financial year.

The main perceived disadvantage of this option is that rates will increase at a level higher than the NSW Government rate peg.

The perceived advantages of the option are that the Council will be able to:

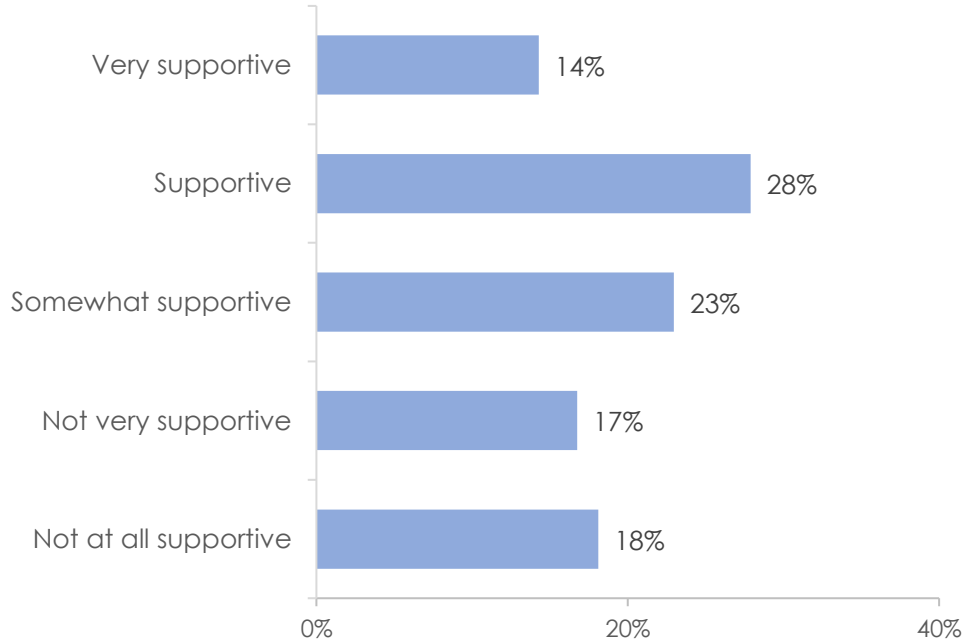
- Recover from the 12.1% inflation increase over the last two years
- Continue to deliver – and improve upon – highly valued services to the community
- Deliver average annual surpluses of $4.77m, which subject to future financial shocks, could be re-invested in community services and projects
- Increase responsiveness to resident and business enquiries
- Increase Council's ability to absorb future financial, extreme weather and growth shocks
- Provide capacity to maintain and renew community assets
- An additional $2 million a year to allow Council to invest in public area maintenance, including additional cleaning, care and beautification projects in parks, cycling and walking routes and town centres and boost the city's tree canopy – although there would be no dedicated additional funding stream for new priority community infrastructure



Support for Option 3: 'Increase Services' – 15% increase

For the 15% 'Increase Services' option, 65% or respondents were at least somewhat supportive of Council proceeding with it, the highest result of the 4 SRV options. Further, non-ratepayers and residents who have lived in the area for ten years or less were more likely to support this option.

Q2c. Support for 'Increase Services' Option
(15% increase)



	Overall	Awareness of the SRV		Ratepayer Status	
		Yes	No/ Unsure	Ratepayer	Non-ratepayer
Top 3 Box %	65%	64%	66%	61%	83%
Base	419	197	222	322	87

	Overall	Gender		Age				Time lived in area			Ward			
		Male	Female	18-34	35-49	50-64	65+	10 years or less	11- 20 years	More than 20 years	Middle Harbour	Naremburn	Sailors Bay	West Ward
Top 3 Box %	65%	66%	64%	76%	63%	59%	61%	77%	57%	60%	61%	67%	58%	74%
Base	419	198	220	106	133	94	86	142	109	169	110	101	104	104

Base: N = 419

Q2c. How supportive, if at all, are you of Council proceeding with this 'Increase Services' option?

Scale: 1 = not at all supportive, 5 = very supportive
A significantly higher/lower level of support (by group)

Option 4: 'Increase Services +Infrastructure' – 20% increase

Residents were provided with the following details regarding Option 4:

This option would involve an increase of 20% in the 2024-2025 financial year, consisting of the rate peg amount of 3.5% and applying to the NSW Government for a special rate increase of 16.5%. The special rate increase would only apply in 2024-2025, and would be built into the rate base thereafter.

- The average residential ratepayer who is currently paying around $1,088 per year would pay an extra $218 in the 2024-2025 financial year, or $4.19 a week.
- The average Chatswood Town Centre business ratepayer who is currently paying around $7,803 per year would pay, on average, an extra $1,561 in the 2024-2025 financial year. Businesses outside the Chatswood Town Centre who are currently paying around $6,524 per year would pay, on average, an extra $1,305 in the 2024-2025 financial year.

The main perceived disadvantage of this option is that rates will increase at a level higher than the NSW Government rate peg.

The perceived advantages of the option are that the Council will be able to:

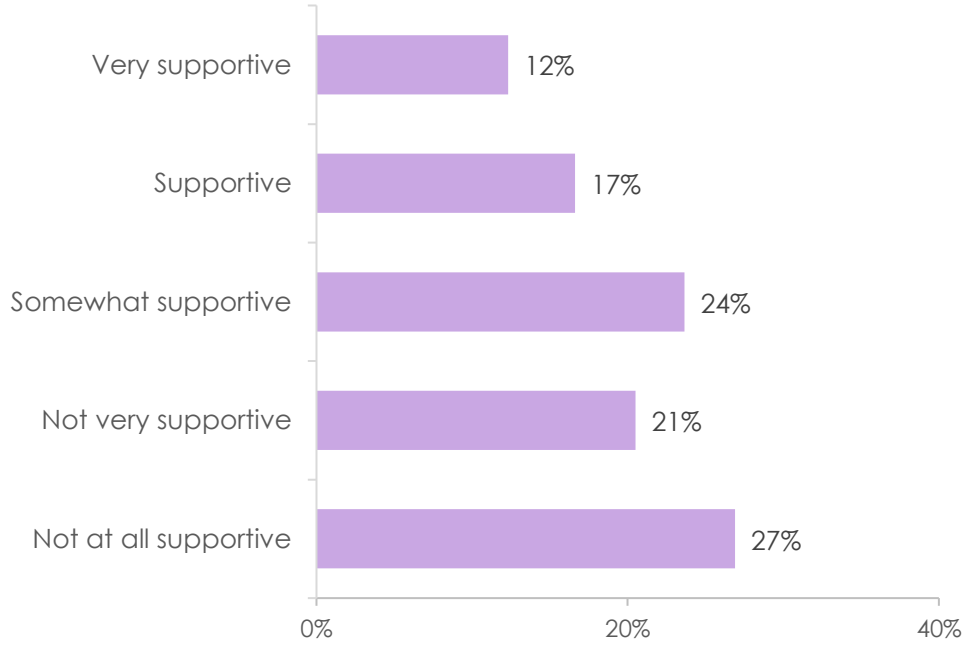
- Recover from the 12.1% inflation increase over the last two years
- Continue to deliver – and improve upon – highly valued services to the community
- Deliver average annual surpluses of $5.05m, which subject to future financial shocks, could be re-invested in community services and projects
- Increase responsiveness to resident and business enquiries
- Increase Council's ability to absorb future financial, extreme weather and growth shocks
- Provide capacity to maintain and renew community assets
- An additional $2 million a year to improve maintenance outcomes, gardens beautification, and planting programs to boost the City's urban tree canopy
- An additional $2.5 million a year for new priority community infrastructure which supports a healthy, active and connected population. This could include funding, for example, to upgrade sports pavilions, cycling and walking paths and parks and playground facilities, complete the Dougherty Centre upgrade or close the funding gap needed to build the Gore Hill Indoor Sports Centre.



Support for Option 4: 'Increase Services +Infrastructure' – 20% increase

53% of residents were at least somewhat supportive of Council proceeding with the 20% increase option. Those who are aged 18 to 34 or have lived in the area for 10 years or less were more likely to show support for this option, while those aged 65 and over were less likely to show support.

Q2d. Support for 'Increase Services +Infrastructure' Option
(20% increase)



	Overall	Awareness of the SRV		Ratepayer Status	
		Yes	No/ Unsure	Ratepayer	Non-ratepayer
Top 3 Box %	53%	51%	54%	50%	62%
Base	419	197	222	328	87

	Overall	Gender		Age				Time lived in area			Ward			
		Male	Female	18-34	35-49	50-64	65+	10 years or less	11- 20 years	More than 20 years	Middle Harbour	Naremburn	Sailors Bay	West Ward
Top 3 Box %	53%	53%	53%	65%	56%	45%	42%	64%	46%	47%	49%	52%	49%	60%
Base	419	198	220	106	133	94	86	142	109	169	110	101	104	104

Base: N = 419

Q2d. How supportive, if at all, are you of Council proceeding with this 'Increase Services + Infrastructure' option?

Scale: 1 = not at all supportive, 5 = very supportive
A significantly higher/lower level of support (by group)



Analysis of Business Ratepayers

Appendix 2

micromex research

WILLOUGHBY CITY COUNCIL

Summary Analysis of Business Ratepayers

Ratepayers in this report have been shown as one group, this was due to a very low sample size of business ratepayers (N=8). Whilst the results below suggest that business ratepayers responded similarly to residential ratepayers, there is not enough data to make any solid conclusions.

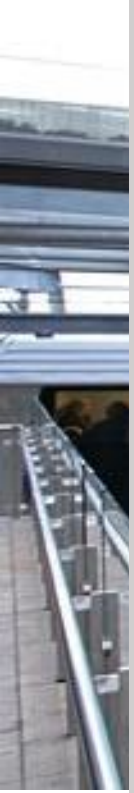
Q4a. Awareness	Residential ratepayer	Business ratepayer
Yes	57%	63%
No	40%	13%
Not sure	3%	25%
Base	328	8*

Q4b. Means of Learning About the SRV	Residential ratepayer	Business ratepayer
Letter/brochure in the post from Council	88%	60%
Email from Council	19%	20%
Council website	5%	20%
Base	232	5*

Q2a/b/c/d. Support	%Supportive/very supportive	
	Residential ratepayer	Business ratepayer
'Maintain Services' – 12% rate increase	40%	25%
'Increase Services' – 15% rate increase	40%	25%
'Reduce Services' – Rate Peg only	21%	25%
'Increase Services + Infrastructure – 20% rate increase	28%	0%
Base	328	8*

Q3a. Preference	First Preference		Mean Preference Rank	
	Residential ratepayer	Business ratepayer	Residential ratepayer	Business ratepayer
'Maintain Services' – 12% rate increase	33%	25%	1.96	2.13
'Increase Services' – 15% rate increase	24%	50%	2.20	1.88
'Reduce Services' – Rate Peg only	28%	13%	2.76	3.25
'Increase Services + Infrastructure – 20% rate increase	15%	13%	3.08	2.75
Base	328	8*	328	8*

Note: due to low base size of business ratepayers, compare results at an interest level only





Additional Analyses and Benchmarks

Appendix 3

Means of Learning About the SRV – By Demographics

	Overall	Residential Ratepayer Status	
		Ratepayer	Non-ratepayer
Letter/brochure in the post from Council	85%	88%	50%
Email from Council	19%	19%	24%
Word-of-mouth	11%	9%	31%
Council's social media channels	9%	8%	12%
Outdoor poster/sign	7%	4%	39%
Council website	5%	5%	20%
Other websites or social media channels not managed by Council	5%	5%	0%
Media (eg: TV, newspapers, radio)	3%	3%	12%
Handed a flyer by a Council representative	3%	2%	12%
Picked up a flyer at a Council venue	1%	1%	9%
Other (please specify)	1%	1%	0%
Base	197	187	13

Q4b. How were you informed that Council was seeking community feedback on rate rise options?

A significantly higher/lower percentage (by group)

Means of Learning About the SRV – By Demographics

	Overall	Gender		Age				Time lived in area			Ward			
		Male	Female	18-34	35-49	50-64	65+	10 years or less	11- 20 years	More than 20 years	Middle Harbour	Naremburn	Sailors Bay	West Ward
Letter/brochure in the post from Council	85%	85%	86%	59%	92%	87%	84%	76%	88%	87%	82%	82%	87%	90%
Email from Council	19%	4%	6%	0%	5%	7%	6%	6%	5%	5%	23%	26%	8%	21%
Word-of-mouth	11%	6%	7%	23%	7%	5%	3%	18%	3%	5%	16%	5%	8%	13%
Outdoor poster/sign	9%	3%	7%	0%	7%	5%	3%	7%	0%	7%	10%	12%	7%	6%
Council's social media channels	7%	3%	3%	0%	5%	2%	4%	5%	2%	3%	13%	4%	4%	6%
Council website	5%	9%	12%	23%	10%	11%	7%	20%	7%	10%	5%	2%	4%	9%
Other websites or social media channels not managed by Council	5%	8%	9%	9%	12%	10%	4%	19%	5%	7%	8%	0%	6%	4%
Media (eg: TV, newspapers, radio)	3%	1%	2%	0%	2%	3%	0%	4%	2%	1%	1%	2%	2%	6%
Handed a flyer by a Council representative	3%	2%	3%	0%	5%	0%	4%	5%	3%	2%	1%	0%	2%	6%
Picked up a flyer at a Council venue	1%	1%	1%	0%	0%	1%	1%	2%	0%	0%	2%	0%	0%	4%
Other (please specify)	1%	90	107	15	58	59	65	32	55	111	3%	0%	0%	0%
Base	197	90	107	15	58	59	65	32	55	111	49	43	54	51

Q4b. How were you informed that Council was seeking community feedback on rate rise options? Prompt

A significantly higher/lower percentage (by group)

Reasons for Preference

	Rate Peg only	12% rate increase	15% rate increase	20% rate increase
Doesn't want an increase/can't afford/increase too high	45%	16%	7%	4%
Affordable option	9%	23%	25%	10%
Maintain service levels	1%	26%	10%	24%
Council needs the increase/only solution	3%	16%	20%	24%
Upgrading services, facilities and infrastructure	0%	4%	26%	39%
Prevent service decline	4%	17%	7%	18%
Ensure rate rise can be afforded by the entire community	7%	16%	13%	2%
Council should reduce expenditure/manage finances better	9%	9%	2%	3%
Council should seek alternatives for generating revenue/leave rates as is	12%	6%	2%	1%
Issues with Council actions	10%	6%	2%	1%
Focus on core services/no extras needed	9%	7%	2%	0%
Happy with current service levels	4%	9%	1%	0%
Lack of accountability/transparency of how funds are spent	10%	3%	1%	1%
Benefits the community	5%	1%	5%	5%
Council is already lacking services/maintenance	3%	3%	0%	4%
More information is required	2%	3%	1%	1%
Happy with Council	1%	5%	0%	0%
Rising population will contribute to Council rates	3%	0%	1%	3%
Best option	1%	2%	2%	0%
Would prefer a middle ground option	0%	2%	3%	0%
Does not impact me/can afford any option	0%	0%	0%	8%
Lack of community consultation	3%	0%	0%	0%
Support fixing roads	1%	0%	0%	1%
Other	4%	1%	1%	6%
Base	107	139	110	63

Q3b. What is your reason for choosing that option as your highest preference?

Councils Used to Create the Micromex Metro Benchmark

The Metro SRV Benchmark was composed from the Council areas listed below:
Blacktown
Burwood
Camden
Campbelltown
Cumberland
Georges River
Hawkesbury
Hunters Hill
Ku-ring-Gai
Penrith
Randwick
Ryde
Ashfield* (Inner West)
Marrickville* (Inner West)
Warringah* (Northern Beaches)

**Former (now amalgamated) Councils*



Appendix 4

The Questionnaire

Willoughby City Council
Community Survey – Special Rate Variation
Draft 9 – September 25, 2023

Good morning/afternoon/evening, my name is ..... from Micromex Research and we are conducting a survey on behalf of Willoughby City Council on a range of local issues. The survey will take about 15 minutes, would you be able to assist us please?

Section 1: Screeners

S1. Can I please confirm that you do live in the Willoughby City Council area?

- O Yes
- O No **(Terminate)**

S2. Are you… (prompt)

- O An employee of Willoughby City Council (Continue)
- O A Councillor of Willoughby City Council (Terminate)
- O (Do NOT Prompt) Neither (Continue)

S3. In which suburb do you live?

Middle Harbour

- O Castle Cove
- O Chatswood*
- O Middle Cove
- O Roseville*
- O Willoughby North*
- O Willoughby East

Naremburn

- O Artarmon
- O Naremburn*
- O St Leonards
- O Willoughby*

Sailors Bay

- O Castlecrag
- O Chatswood*
- O Naremburn*
- O Northbridge
- O Willoughby*
- O Willoughby North*

West Ward

- O Chatswood*
- O Chatswood West
- O Lane Cove North
- O Roseville*

**Crosses ward*

S4. Do you or your household pay Council rates to Willoughby City Council for any of the following? *Prompt* (MR)

- O Residential rates (1)
- O Business rates (2)
- O None of these

S5. [If Code 2 on S4, ask] In which suburb in the Willoughby local government area is your Business that you pay rates for located? (If multiple locations, record 'main/largest business facility' suburb only – SR)

[Repeat suburb list from S3]

[There is NO Section 2/Question 1]

Section 3: SRV Concept Statement

Willoughby City Council is facing two challenges.

Firstly, due to a growing and increasingly diverse population and rising community expectations, the Council is under more pressure to improve services.

Secondly, Council is finding it more difficult to meet these growth and community expectations, due to a deteriorating financial position linked to a range of unexpected economic events, including $20.6m in COVID-19 pandemic revenue losses and high inflation.

At the same time as these unexpected events, Council's rate revenue has fallen, due to NSW Government rate pegs being set well below inflation levels and the cessation of the Council's 7.3% Infrastructure Levy in 2022.

As a result, Council now has the second lowest average residential rates out of the eight councils in Northern Sydney.

Council is already taking a number of measures to address these challenges, such as identifying efficiency improvements and looking for additional revenue sources – and these initiatives will continue.

However, even taking into account these measures, the Council could get into financial difficulty by mid-2025 (if it continues to renew local infrastructure to acceptable levels) and therefore needs to examine rate rise options.

The Council is now seeking feedback on four long-term rate rise options. These options are known as (flip order):

- Reduce Services
- Maintain Services
- Increase Services; and
- Increase Services and Infrastructure

Let's look at the options in more detail:

Note: *Flip order of exposure 1-4/4-1 (so same order as bullet points above)*

Option 1: 'Reduce Services' – Rate Peg Increase only

For this option, rates would increase in line with the expected NSW Government rate revenue peg of 3.5% (which is available to all councils). In other words, the Council would not apply to the government for a special rate increase.

The average residential ratepayer who is currently paying $1,088 per year, would pay an extra $38 in the 2024-2025 financial year (or 73 cents a week).

(If Code 2 on S4 also say: The average Chatswood Town Centre business ratepayer who is currently paying around $7,803 per year would pay, on average, an extra $273 in the 2024-2025 financial year. Businesses outside the Chatswood Town Centre who are currently paying around $6,524 per year would pay, on average, an extra $228 in the 2024-2025 financial year).

Under this option, because of the low rate increase, the Council would instead balance its budget by reducing services to the value of $2.8m and increasing revenue by $500,000.

The main perceived advantage of this option is that rates will stay low.

The perceived disadvantages include:

- Overall service reductions, potentially including reduced maintenance and putting at risk the timely renewal of assets
- No ability to accumulate funds for future community services or projects
- No financial buffer to manage future financial shocks or extreme weather events
- Future rate increases above the rate peg are highly likely
- Reduced staff morale, making it more difficult to attract and retain staff

Q2a. How supportive, if at all, are you of Council proceeding with this 'Reduced Services' option? *Prompt*

O Very supportive
O Supportive
O Somewhat supportive
O Not very supportive
O Not at all supportive

Option 2: 'Maintain Services' – 12% increase

This option would involve an increase of 12% in the 2024-2025 financial year, consisting of the rate peg amount of 3.5% and Council applying for a special rate increase of 8.5%. The special rate increase would only apply in 2024-2025, and would be built into the rate base thereafter.

The average residential ratepayer who is currently paying $1,088 per year would pay an extra $130 in the 2024-2025 financial year, or $2.50 a week.

(If Code 2 on S4 also say: The average Chatswood Town Centre business ratepayer who is currently paying around $7,803 per year would pay, on average, an extra $936 in the 2024-2025 financial year. Businesses outside the Chatswood Town Centre who are currently paying around $6,524 per year would pay, on average, an extra $783 in the 2024-2025 financial year).

The main perceived disadvantage of this option is that rates will increase at a level higher than the NSW Government rate peg.

The perceived advantages of the option are that the Council will be able to:

- Recover from the 12.1% inflation increase over the last two years
- Continue to deliver – but not improve upon – highly valued services to the community
- Deliver average annual surpluses of $5.22m, which subject to future financial shocks, could be re-invested in community services and projects
- Increase responsiveness to resident and business enquiries
- Increase Council's ability to absorb future financial, extreme weather and growth shocks
- Provide capacity to maintain and renew community assets

Q2b. How supportive, if at all, are you of Council proceeding with this 'Maintain Services' option? *Prompt*

O Very supportive
O Supportive
O Somewhat supportive
O Not very supportive
O Not at all supportive

Option 3: 'Increase Services' – 15% increase

This option would involve an increase of 15% in the 2024-2025 financial year, consisting of the rate peg amount of 3.5% and applying to the NSW Government for a special rate increase of 11.5%. The special increase would apply in 2024-2025, and would be built into the rate base thereafter.

The average residential ratepayers who is currently paying $1,088 per year would pay an extra $163 in the 2024-2025 financial year, or $3.13 a week.

(If Code 2 on S4, also say: The average Chatswood Town Centre business ratepayer who is currently paying around $7,803 per year would pay, on average, an extra $1,170 in the 2024-2025 financial year. Businesses outside the Chatswood Town Centre who are currently paying around $6,524 per year would pay, on average, an extra $979 in the 2024-2025 financial year.

The main perceived disadvantage of this option is that rates will increase at a level higher than the NSW Government rate peg.

The perceived advantages of the option are that the Council will be able to:

- Recover from the 12.1% inflation increase over the last two years
- Continue to deliver – and improve upon – highly valued services to the community
- Deliver average annual surpluses of $4.77m, which subject to future financial shocks, could be re-invested in community services and projects
- Increase responsiveness to resident and business enquiries
- Increase Council's ability to absorb future financial, extreme weather and growth shocks
- Provide capacity to maintain and renew community assets
- An additional $2 million a year to allow Council to invest in public area maintenance, including additional cleaning, care and beautification projects in parks, cycling and walking routes and town centres and boost the city's tree canopy – although there would be no dedicated additional funding stream for new priority community infrastructure

Q2c. How supportive, if at all, are you of Council proceeding with this 'Increase Services' option? *Prompt*

O Very supportive
O Supportive
O Somewhat supportive
O Not very supportive
O Not at all supportive

Option 4: 'Increase Services + Infrastructure' – 20% increase

This option would involve an increase of 20% in the 2024-2025 financial year, consisting of the rate peg amount of 3.5% and applying to the NSW Government for a special rate increase of 16.5%. The special rate increase would only apply in 2024-2025, and would be built into the rate base thereafter.

The average residential ratepayer who is currently paying around $1,088 per year would pay an extra $218 in the 2024-2025 financial year, or $4.19 a week.

(If Code 2 on S4 also say: The average Chatswood Town Centre business ratepayer who is currently paying around $7,803 per year would pay, on average, an extra $1,561 in the 2024-2025 financial year. Businesses outside the Chatswood Town Centre who are currently paying around $6,524 per year would pay, on average, an extra $1,305 in the 2024-2025 financial year.

The main perceived disadvantage of this option is that rates will increase at a level higher than the NSW Government rate peg.

The perceived advantages of the option are that the Council will be able to:

- Recover from the 12.1% inflation increase over the last two years
- Continue to deliver – and improve upon – highly valued services to the community
- Deliver average annual surpluses of $5.05m, which subject to future financial shocks, could be re-invested in community services and projects
- Increase responsiveness to resident and business enquiries
- Increase Council's ability to absorb future financial, extreme weather and growth shocks
- Provide capacity to maintain and renew community assets
- An additional $2 million a year to improve maintenance outcomes, gardens beautification, and planting programs to boost the City's urban tree canopy
- An additional $2.5 million a year for new priority community infrastructure which supports a healthy, active and connected population. This could include funding, for example, to upgrade sports pavilions, cycling and walking paths and parks and playground facilities, complete the Dougherty Centre upgrade or close the funding gap needed to build the Gore Hill Indoor Sports Centre.

Q2d. How supportive, if at all, are you of Council proceeding with this 'Increase Services + Infrastructure' option? *Prompt*

- O Very supportive
- O Supportive
- O Somewhat supportive
- O Not very supportive
- O Not at all supportive

Q3a. Please rank the four options in order of preference: (prompt to remind)

	1st preference	2nd preference	3rd preference	4th preference
'Reduce Services' – Rate Peg only	O	O	O	O
'Maintain Services' – 12% rate increase	O	O	O	O
'Increase Services' – 15% rate increase	O	O	O	O
'Increase Services + Infrastructure' – 20% rate increase	O	O	O	O

Q3b. What is your reason for choosing that option as your highest preference?

.....

Q4a. Prior to this call, were you aware that Council was exploring community sentiment on various rate rise options?

- O Yes
- O No **(Go to Q5a)**
- O Not sure **(Go to Q5a)**

Q4b. How were you informed that Council was seeking community feedback on rate rise options? *Prompt, MR, randomise*

- O Letter/brochure in the post from Council
- O Email from Council
- O Council website
- O Council's social media channels
- O Other websites or social media channels not managed by Council
- O Media (eg: TV, newspapers, radio)
- O Word-of-mouth
- O Outdoor poster/sign
- O Picked up a flyer at a Council venue
- O Handed a flyer by a Council representative
- O Other (please specify) .....

Demographics

Finally, some questions about you…

Q5a. Please stop me when I read out your age group. *Prompt*

- O 18-34
- O 35-49
- O 50-64
- O 65 years and over

Q5b. What is your gender? *Do not prompt*

- O Male
- O Female
- O Other/indeterminate
- O Prefer not to say

Q6. Which of the following best describes the home where you are currently living? *Prompt*

- O I/We own/are currently buying this property
- O I/We currently rent this property

Q7. How long have you lived in the Council area? *Prompt*

- O Under a year
- O 1 – 3 years
- O 4 – 6 years
- O 7 – 10 years
- O 11- 20 years
- O More than 20 years

Q8a. Do you speak any languages other than English at home?

- O Yes
- O No

Thank you very much for your time, enjoy the rest of your evening. This market research is carried out in compliance with the Privacy Act, and the information you provided will be used only for research purposes. Just to remind you, I am calling from Micromex Research on behalf of Willoughby City Council.

If Respondent asks: To find out more information about Willoughby City Council's policies and the rate rise options, please access www.haveyoursaywilloughby.com.au

The information contained herein is believed to be reliable and accurate, however, no guarantee is given as to its accuracy and reliability, and no responsibility or liability for any information, opinions or commentary contained herein, or for any consequences of its use, will be accepted by Micromex Research, or by any person involved in the preparation of this report.



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