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# Introduction



# Research objectives and methodology



## Research objectives

Dunedin City Council (DCC) has commissioned research with residents annually since 1994. This research is conducted in the form of a survey and seeks to understand residents' use of and perspectives on a range of Council facilities, services, and infrastructure. In 2019/20 the survey was conducted by Gravitas Research for the first time.

The specific **objectives** of the research are to:

- Gauge the extent to which the Council is meeting its 10 Year Plan and Annual Plan objectives
- Measure residents' satisfaction with the services, facilities, and infrastructure it provides to the community
- Identify areas for improvement that would be valued by residents.



## Methodology

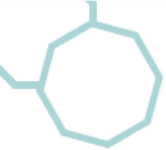
A sequential multi-mode methodology was used, in line with what was used for previous survey waves. Dunedin residents aged 18 years and over were randomly selected from the electoral roll (with quotas based on the 11 community areas) on a monthly basis and sent a letter by post inviting them to go online to complete the questionnaire by entering in a unique ID number. Those who prefer to complete the questionnaire on paper are provided with information on how to request this. A follow up reminder post card is sent out to all those who have not responded, with a hard copy of the questionnaire sent to a random selection of those those who had not responded from each monthly sample. All those who responded went into the draw to win one of three supermarket vouchers as an incentive to participate.

Data is collected via a survey questionnaire, which includes a mix of closed-ended and open-ended questions. Closed questions include frequency of use for a range of facilities and rating satisfaction with facilities, services, infrastructure and aspects of the council service overall on a scale from 1 – 10. The questionnaire in 2019/20 is the same as that used in 2018/19 when some minor changes were made from previous years.

Note: Statistically significant differences in results from the previous year or between users and non-users have been noted throughout the report, with black arrows used to indicate statistically significant higher or lower results. Differences in results that do not have an arrow are differences that are not statistically significant at the 95% confidence level.



# Executive Summary



# Executive summary

Just over half of Dunedin residents (54%) are **satisfied overall with Dunedin City Council** and this is just slightly higher than last year (52%).

**Service and infrastructure delivery** received the highest overall satisfaction rating (66%) among the performance measures (down slightly, but not significantly from 69% last year).

However, less than half of residents (42%) are satisfied overall with the **value for money** of the DCC services and activities. This is a significant decrease from previous years (down from 46% in 2019 and 52% in 2018).

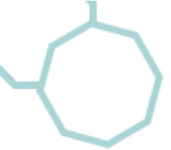
Overall satisfaction with a range of public facilities, infrastructure, and services have significantly declined since last year, as follows:

- Sports and recreation facilities (down to 79%, from 83%)
- 'Other' public facilities (down 85% , from 88%)
- Roothing-related infrastructure (30%, down from 35%)
- Water-related infrastructure (56%, down from 62%)
- Rubbish disposal services (64%, down from 68%).
- Regulatory services (58%, down 64% last year)
- Satisfaction with the way the city is developing overall has declined significantly (65%, down from 69%) since last year.

The top priorities for Dunedin residents relate to **more parking** and improvements to **roading infrastructure** and **traffic flows** and a greater focus on being **sustainable and environmentally-friendly**.

Most commonly made suggestions for improvement are resolving **roading-related infrastructure** issues, more **public consultation** on projects, and **reduction on rates** charged.

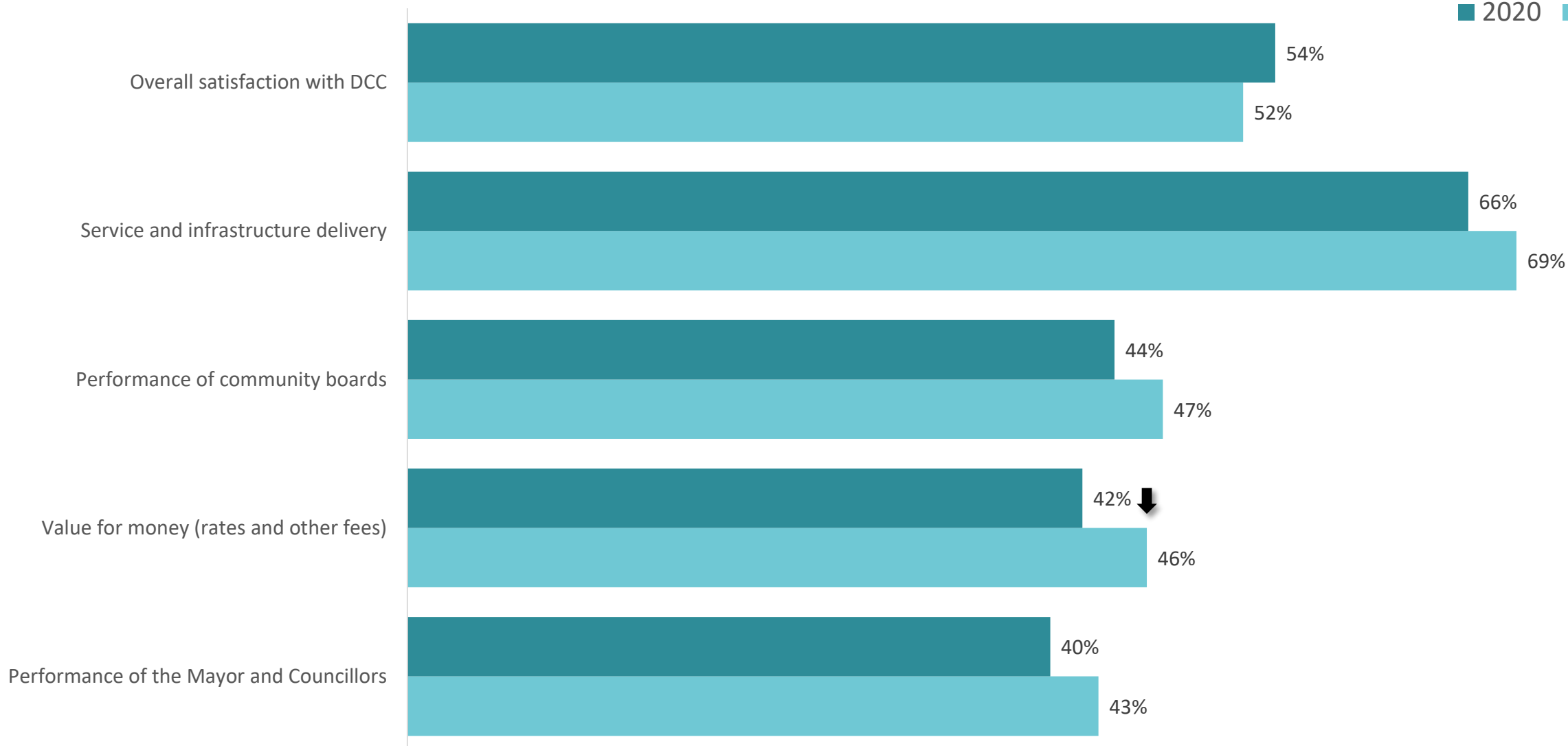
Note: Statistically significant differences in results from the previous year or between groups have been noted throughout the report, with black arrows used to indicate statistically significant higher or lower results. Differences in results that do not have an arrow are differences that are not statistically significant at the 95% confidence level.



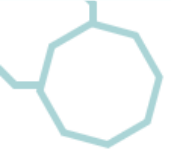
# Overall rating summary

## Performance Measures

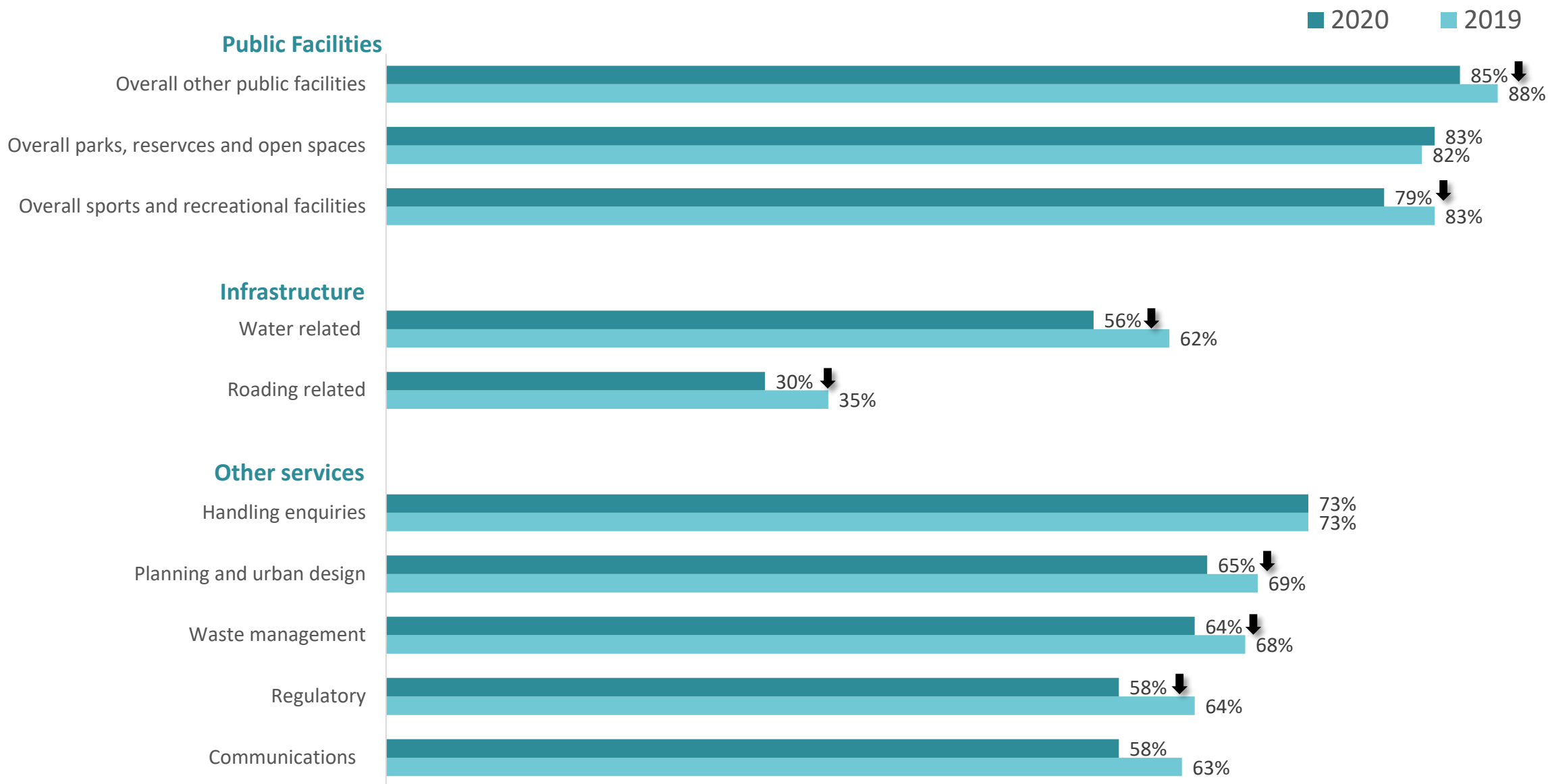
2020 2019







# Overall rating summary



Black arrow indicates statistically significant higher or lower result from the 2018-2019 survey.





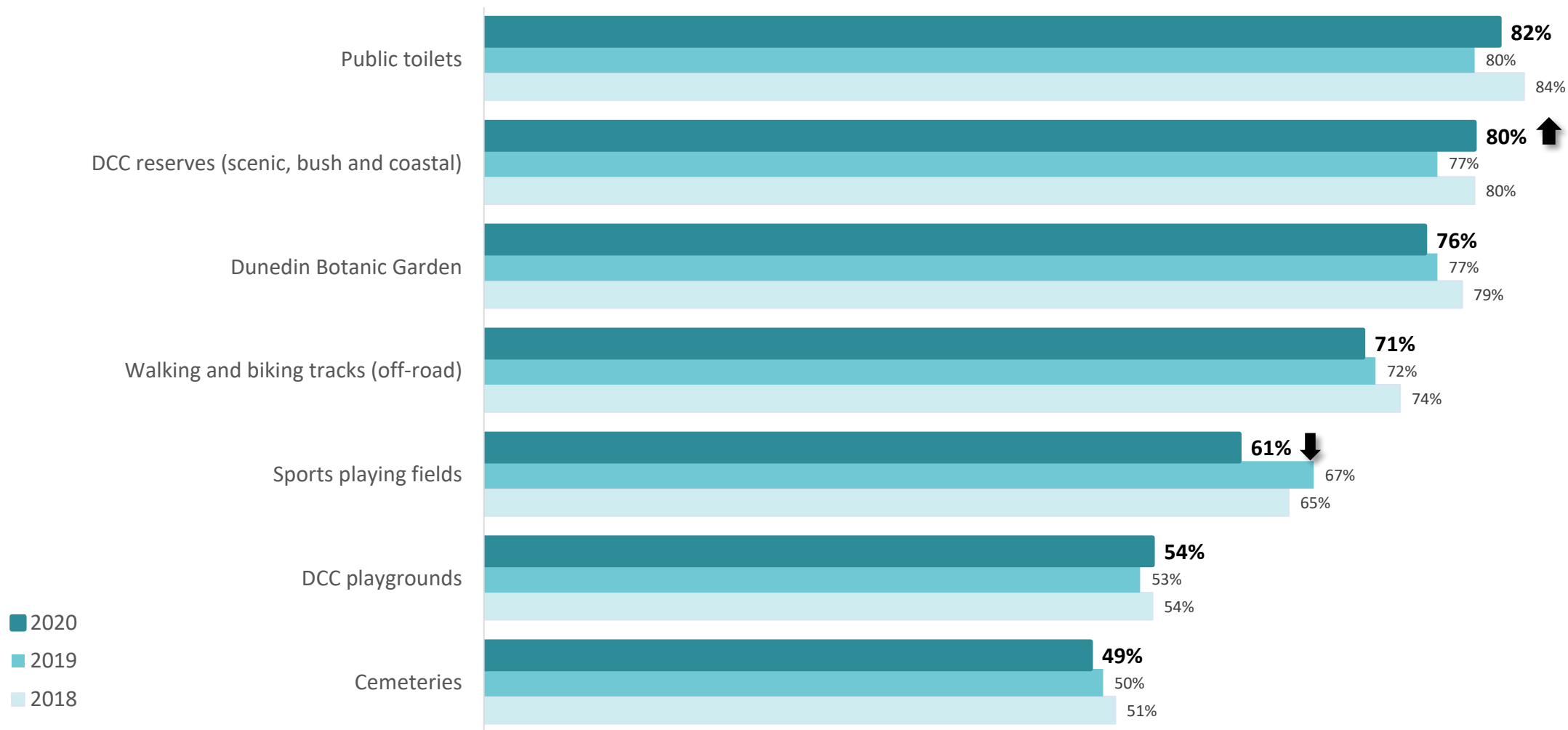
# Facilities

Parks, reserves and open space



# Visiting parks, reserves and open spaces

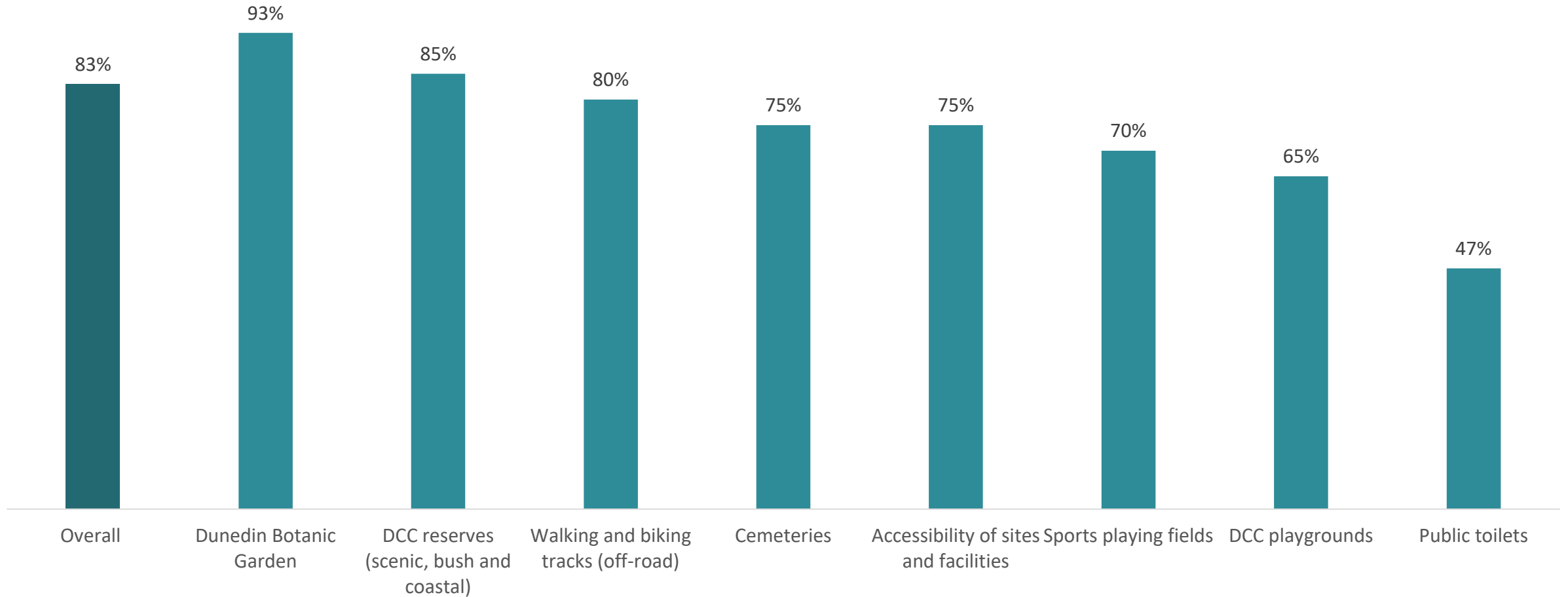
Percentage having visited in the last 12 months





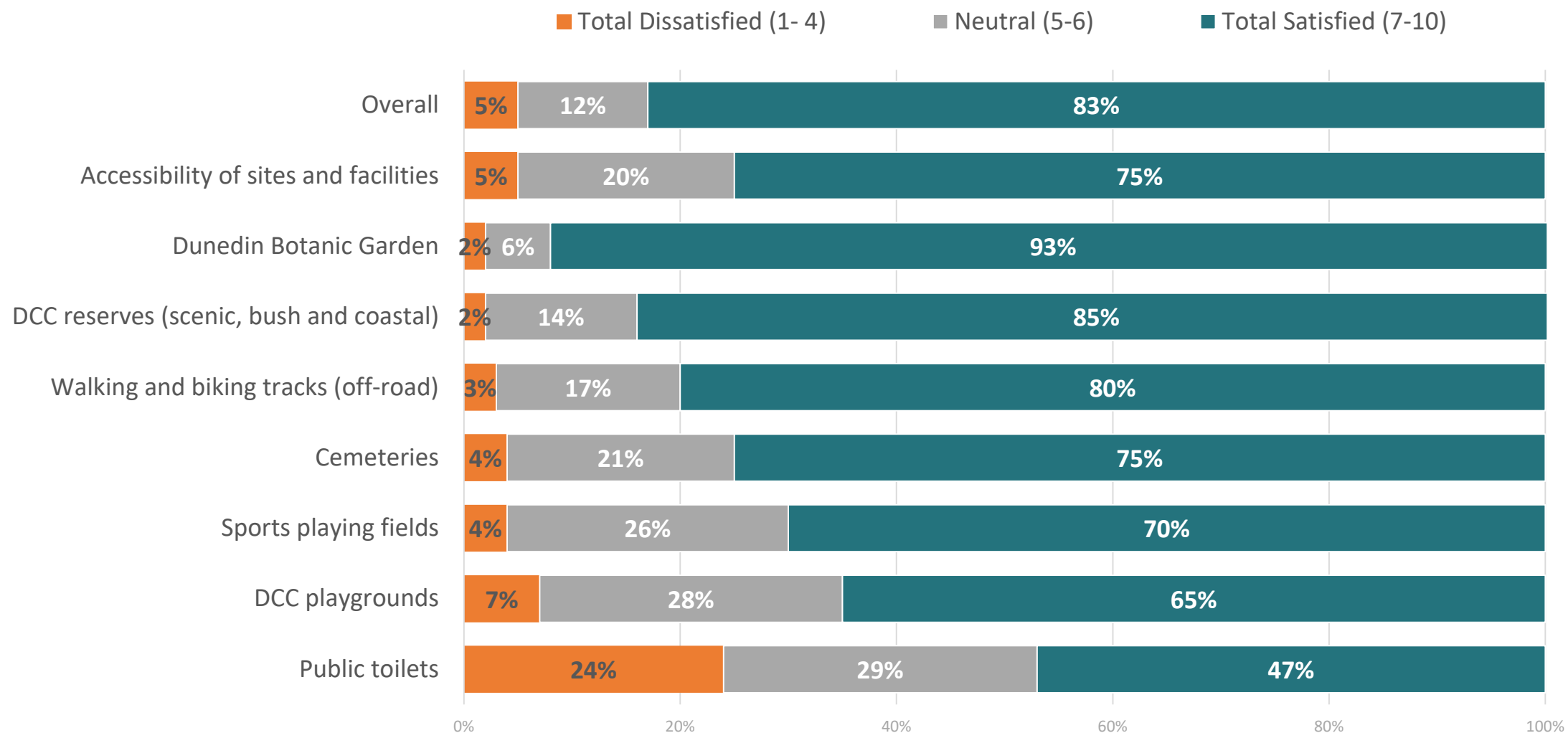
# Satisfaction with parks, reserves and open spaces – 2019/20

In 2019/20, Dunedin Botanic Gardens, DCC reserves and walking and biking tracks received high satisfaction. In contrast, less than half of respondents were satisfied with public toilets.





# Satisfaction with parks, reserves and open spaces – 2019/20

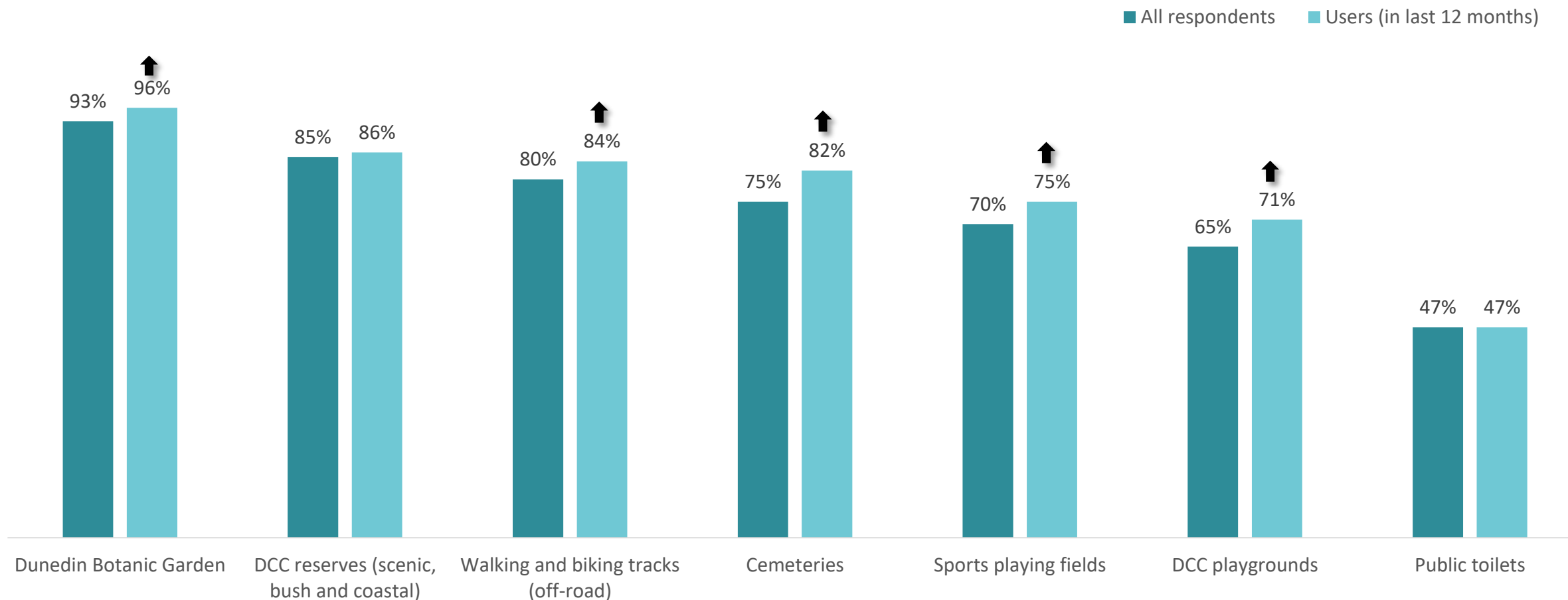






# Satisfaction with parks, reserves and open spaces – 2019/20

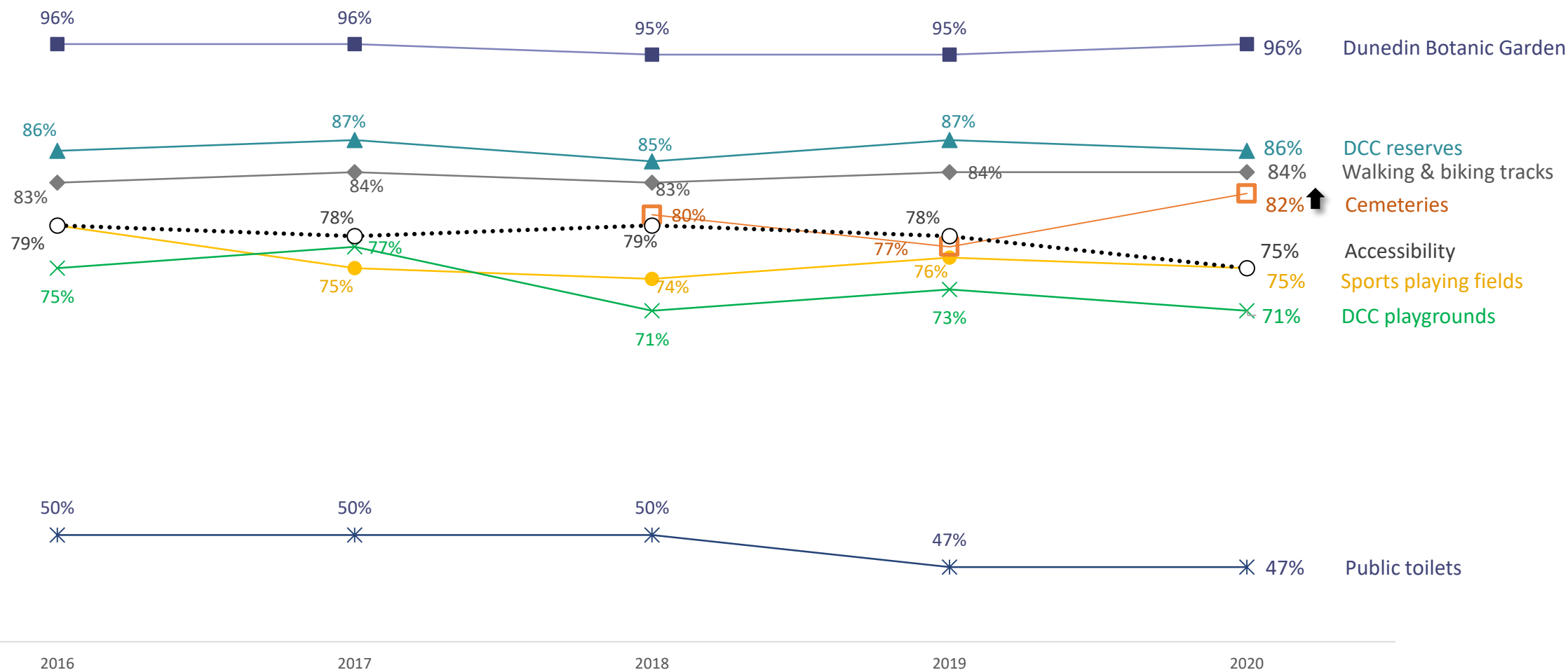
Those who had used a facility in the last 12 months generally gave higher satisfaction ratings, especially for the Botanic Gardens, walking and biking tracks, cemeteries, sports playing fields and playgrounds.





# Satisfaction with parks, reserves and open spaces – users over time

Satisfaction with parks, reserves and open spaces have been generally stable over time. However, in 2019/20 there has been a significant increase in user satisfaction with cemeteries.





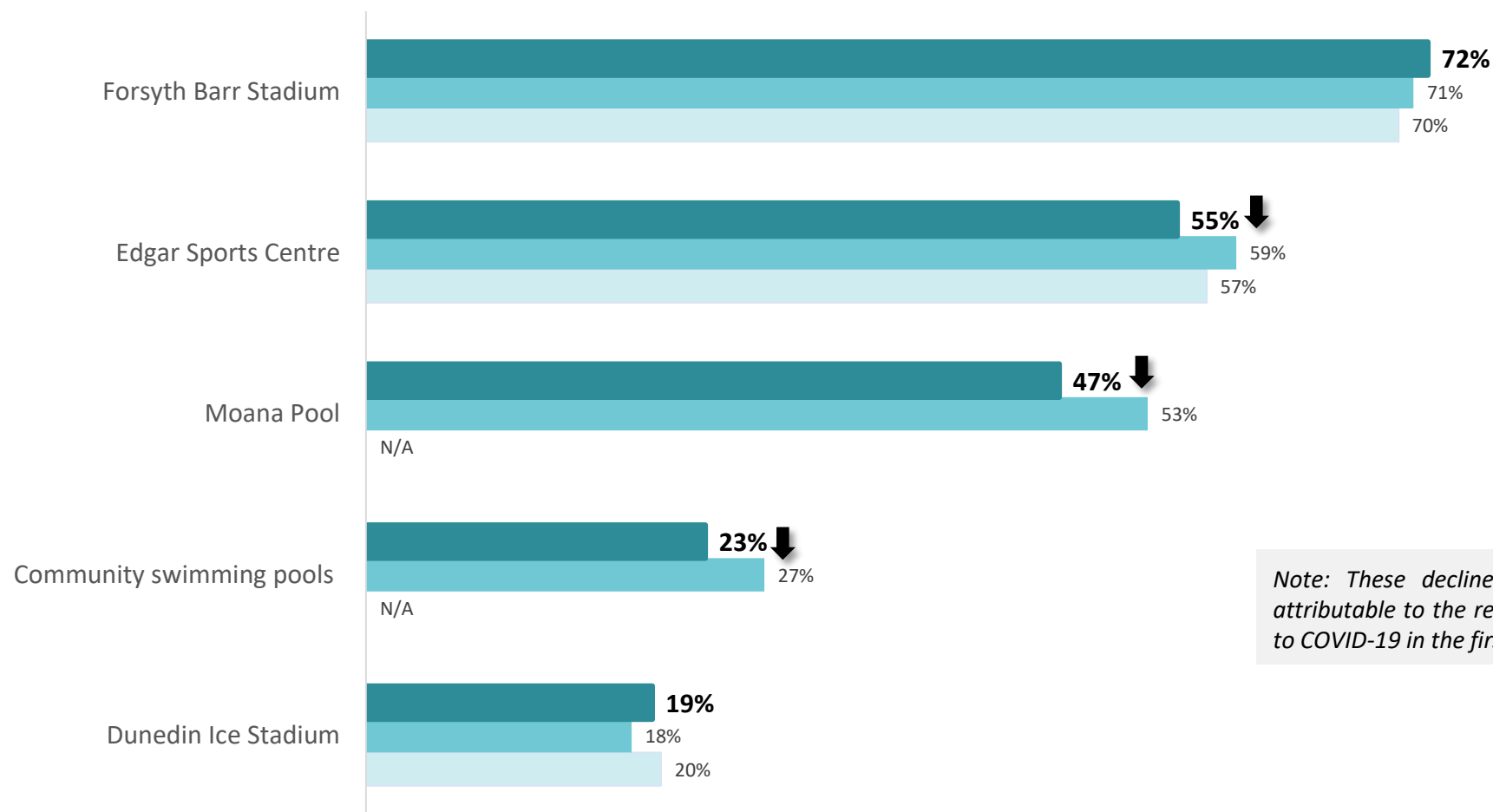
# Facilities

Sports and Recreation Facilities



# Visiting sports and recreation facilities

Percentage having visited in the last 12 months



*Note: These declines in visitation may be attributable to the restrictions on activity due to COVID-19 in the first half of 2020.*

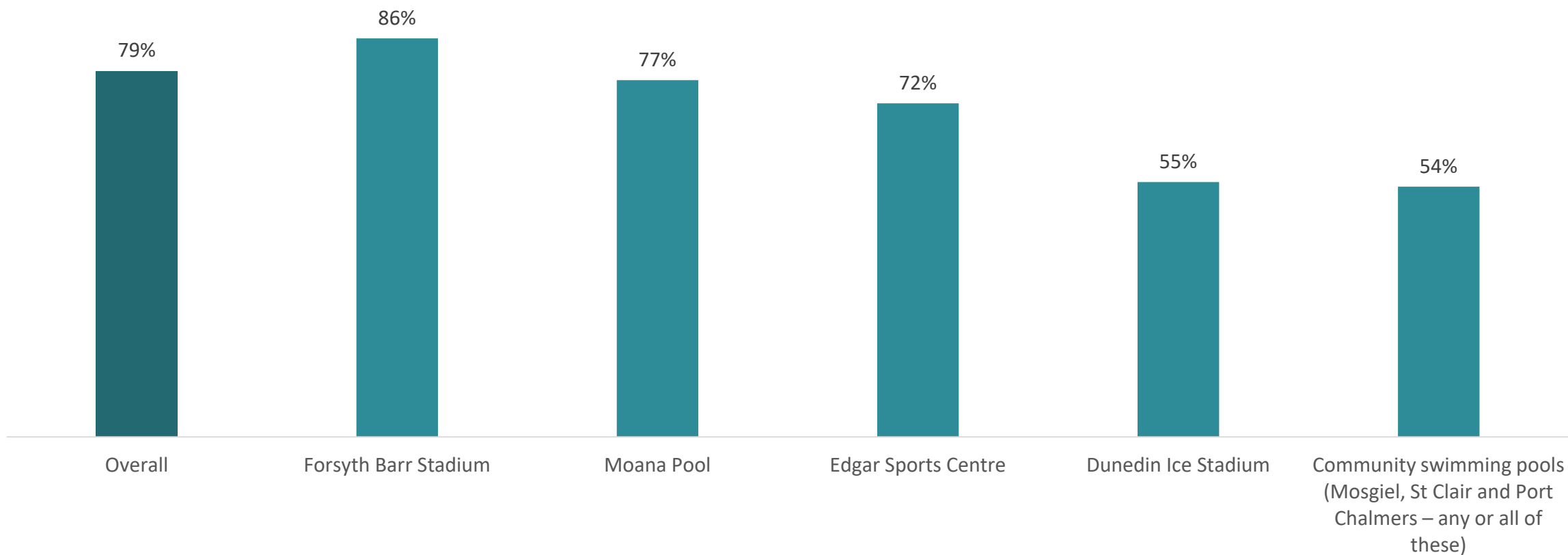
**NOTES** Q: In the last 12 months, about how often have you visited each of the following:  
Total sample size: 2016 n=1,577; 2017 n=1,231; 2018 n=1,356; 2019 n=1,372; 2020 n=1,373. Sample size for significance testing varies each question as 'don't know' responses are excluded.  
Black arrow indicates statistically significant higher or lower result from the 2018-2019 survey.  
In the 2019 questionnaire, 'In the last 12 months how frequently have you visited Swimming pools: Moana, Mosgiel, St Clair, Port Chalmers (any or all of these)' has been removed and replaced with 'Moana swimming pool' and 'Community swimming pools'.





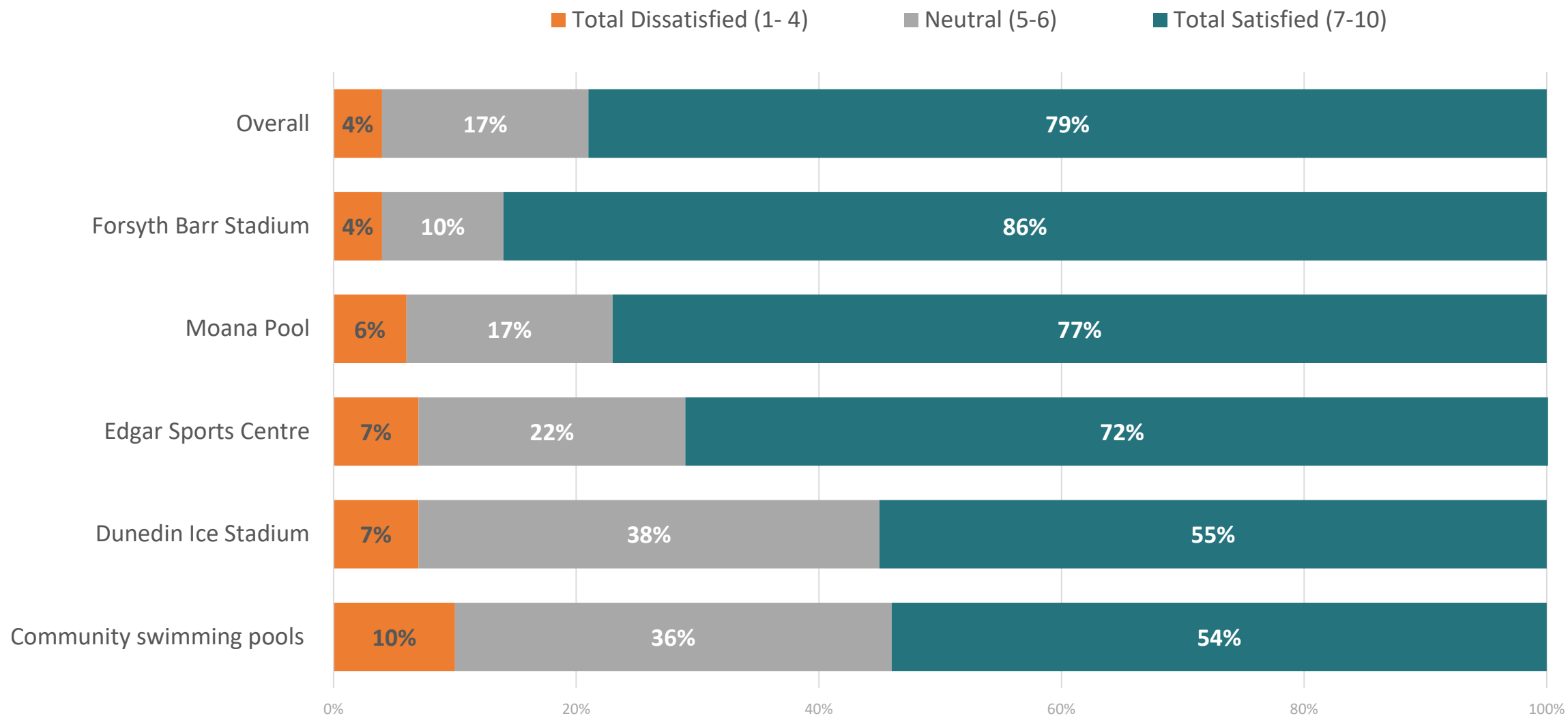
# Satisfaction with sports and recreation facilities - 2019/20

Satisfaction ratings were highest for the Forsyth Barr Stadium, followed by the Moana Pool. In contrast, satisfaction ratings were lowest for community swimming pools and the Dunedin Ice Stadium.





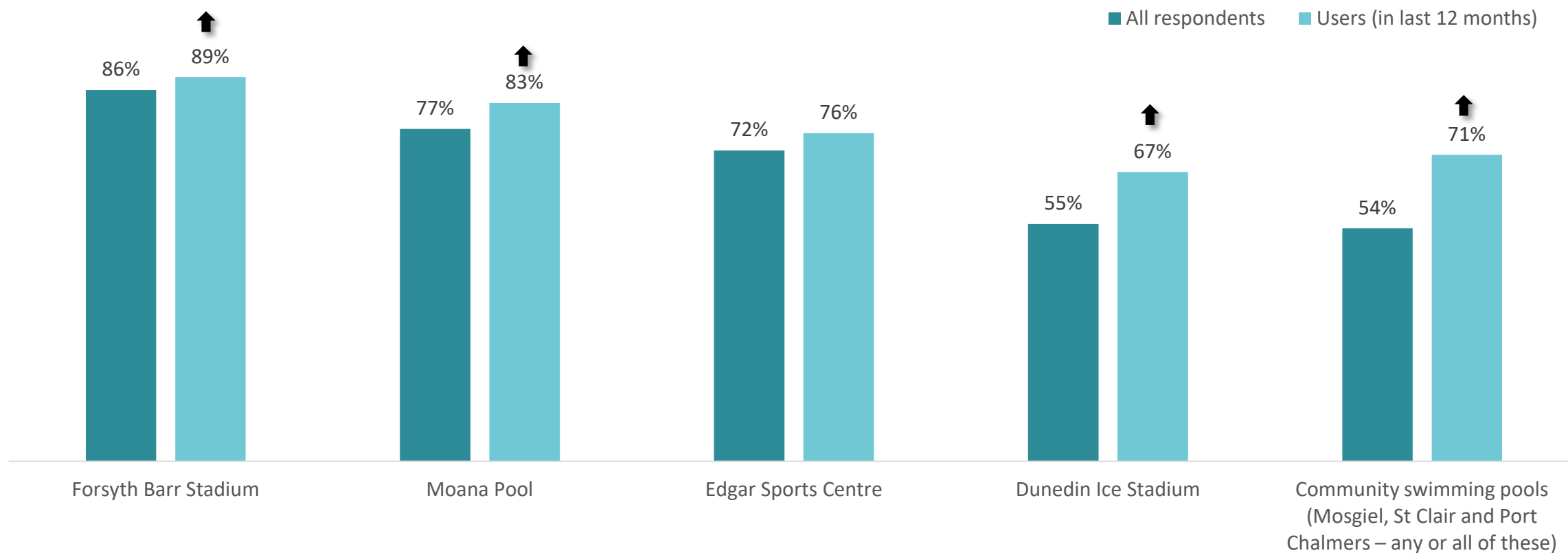
# Satisfaction with sports and recreation facilities – 2019/20





# Satisfaction with sports and recreation facilities - 2019/20

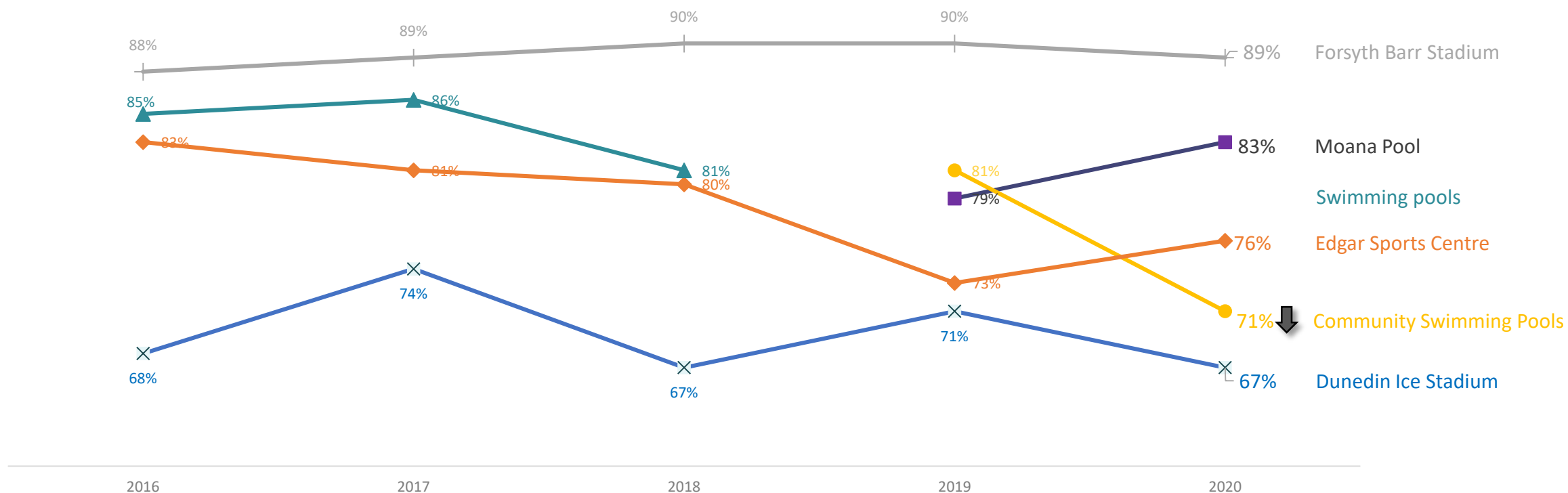
Satisfaction ratings were significantly higher from users across all facilities, except Edgar Sports Centre.





# Satisfaction with sports and recreation facilities – users over time

The most notable change in 2019/20 has been a significant decline in user satisfaction with community swimming pools (down from 81% last year to 71%). Note that a number of the negative comments made by respondents about sports and recreation facilities relate to the Mosgiel Pool needing to be upgraded or replaced. This has likely contributed, at least in part, to the decline in ratings for the community pools overall.



NOTES: Q: How satisfied are you with each of the following?  
In the 2019 questionnaire, 'In the last 12 months how frequently have you visited Swimming pools: Moana, Mosgiel, St Clair, Port Chalmers (any or all of these)' has been removed and replaced with 'Moana swimming pool' and 'Community swimming pools'.  
Total sample size: 2016 n=1,577; 2017 n=1,231; 2018 n=1,356; 2019 n=1,372; 2020 n=1,373. Sample size for significance testing varies each question as 'don't know' responses are excluded.  
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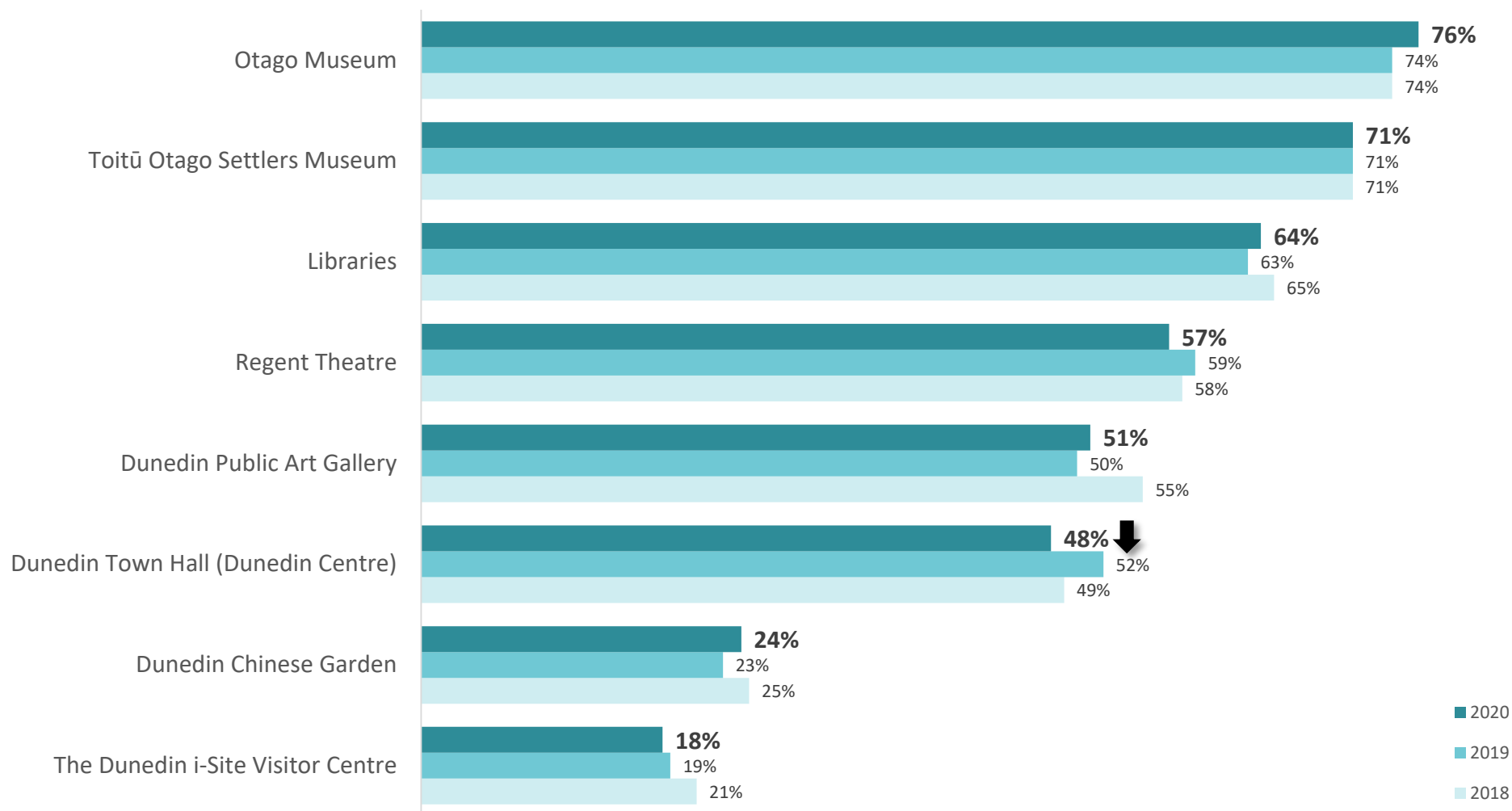
# Facilities

## Other Public Facilities



# Usage of other public facilities

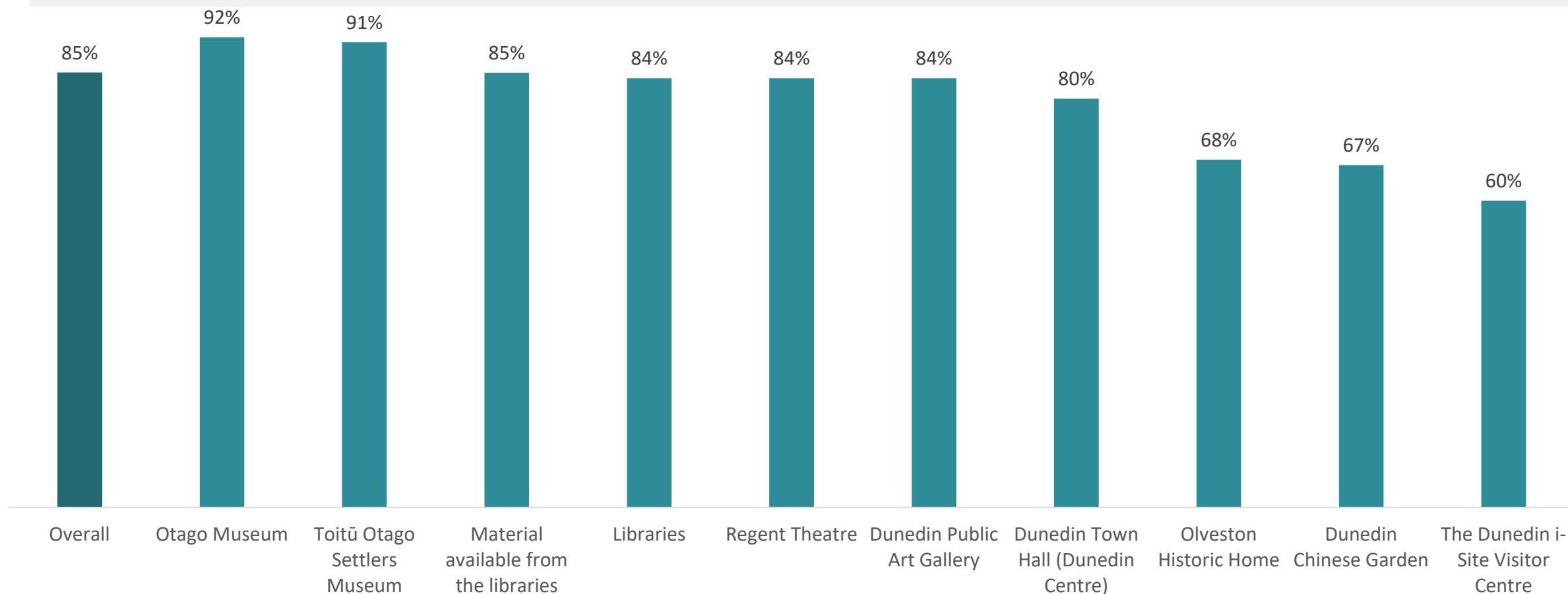
Percentage having visited in the last 12 months





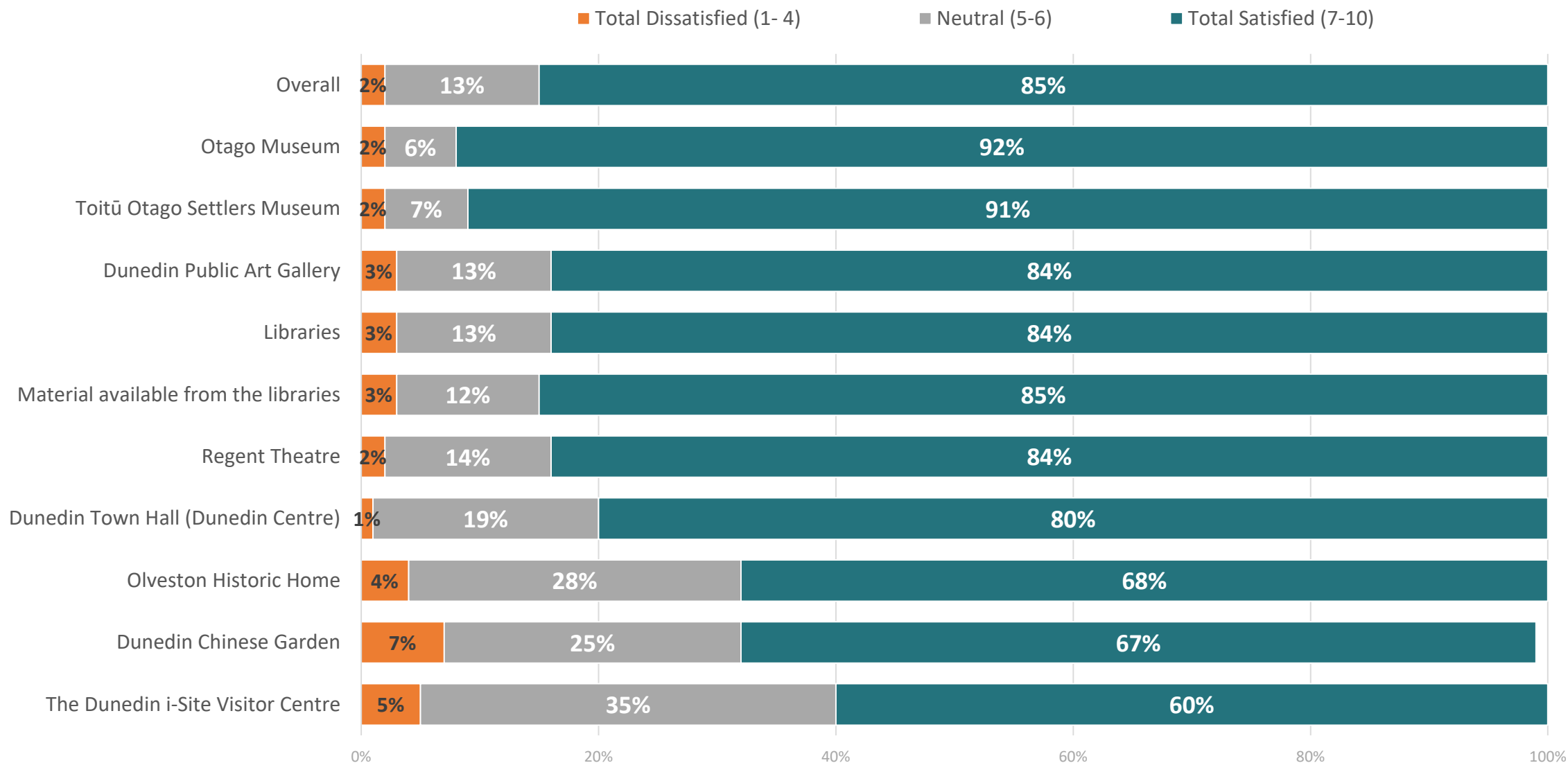
# Satisfaction with other public facilities – 2019/20

Satisfaction ratings were highest for both the Otago Museum and the Toitū Otago Settlers Museum. In contrast, satisfaction ratings were lower for the Dunedin i-Site Visitor Centre, the Dunedin Chinese Garden and Olveston Historic Home, however it should be noted that these three facilities have higher percentages of neutral ratings (rather than negative ratings) likely due to their lower levels of use.





# Satisfaction with other public facilities 2019/20

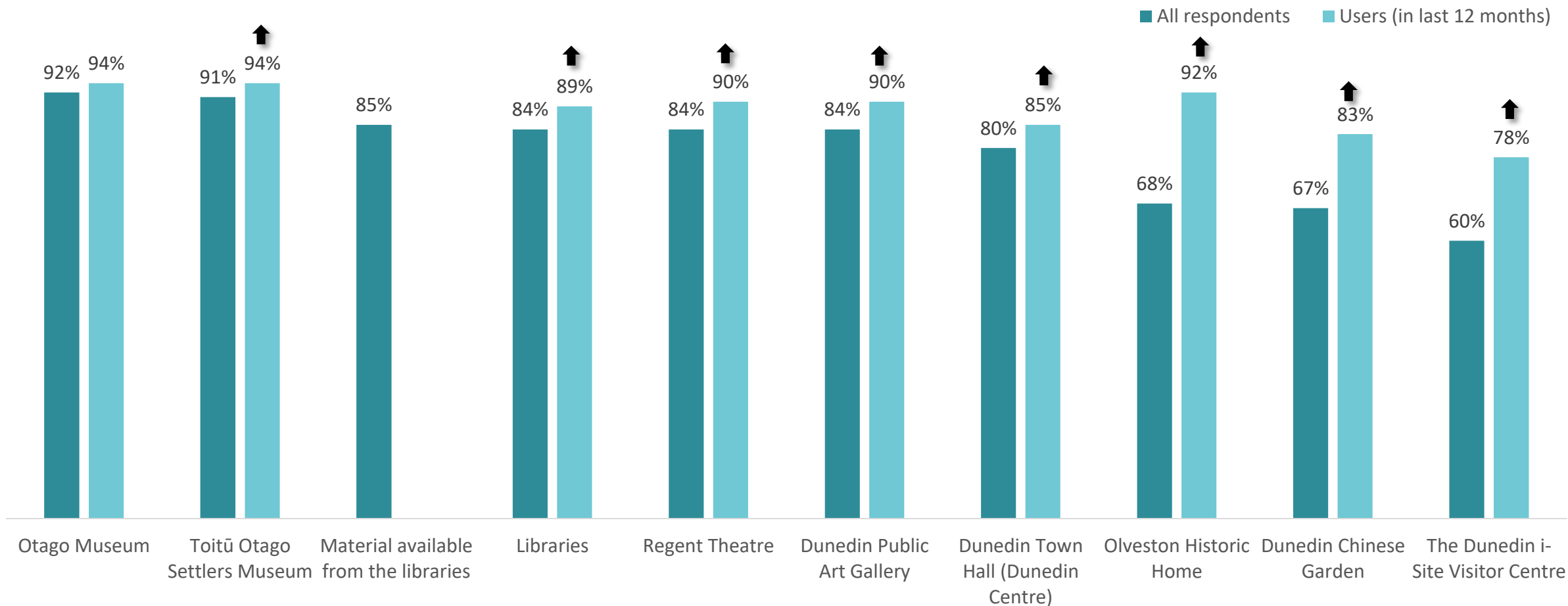






# Satisfaction with other public facilities – 2019/20

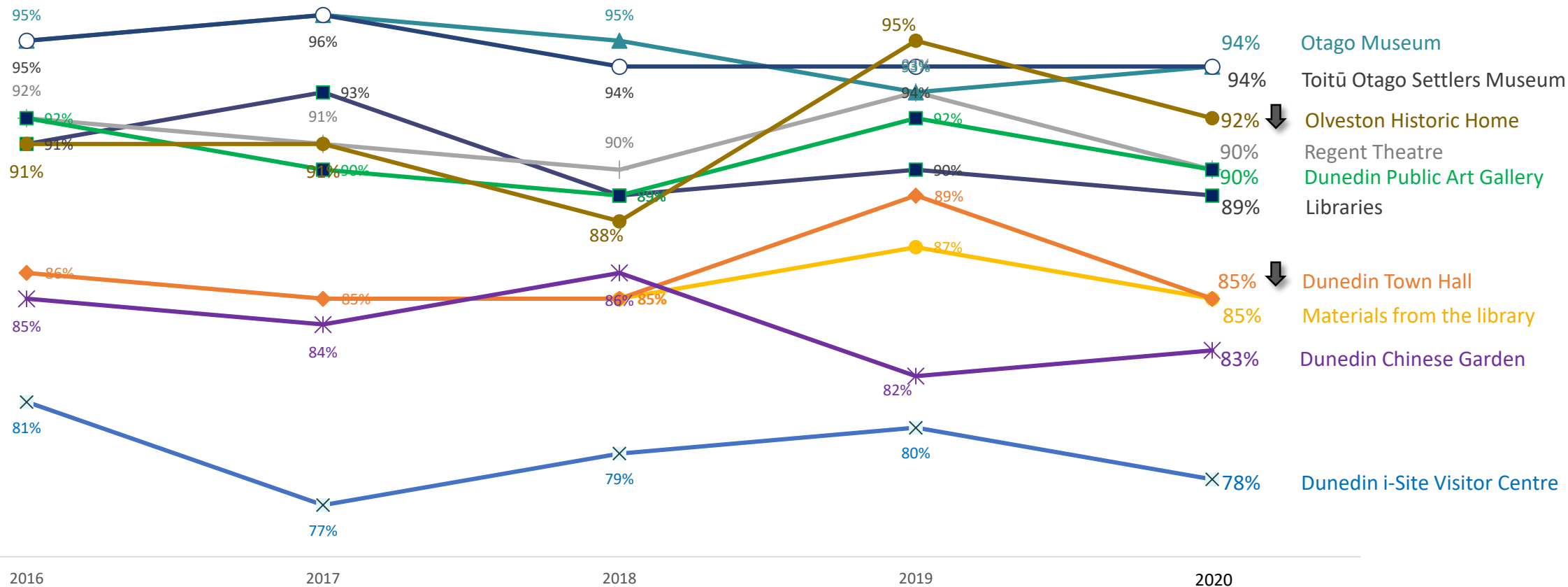
Residents who had used each facility gave higher satisfaction ratings across all the facilities, except for Otago Museum. The biggest difference in satisfaction ratings were for the three facilities that had the smallest number of users overall.





# Satisfaction with other public facilities – users over time

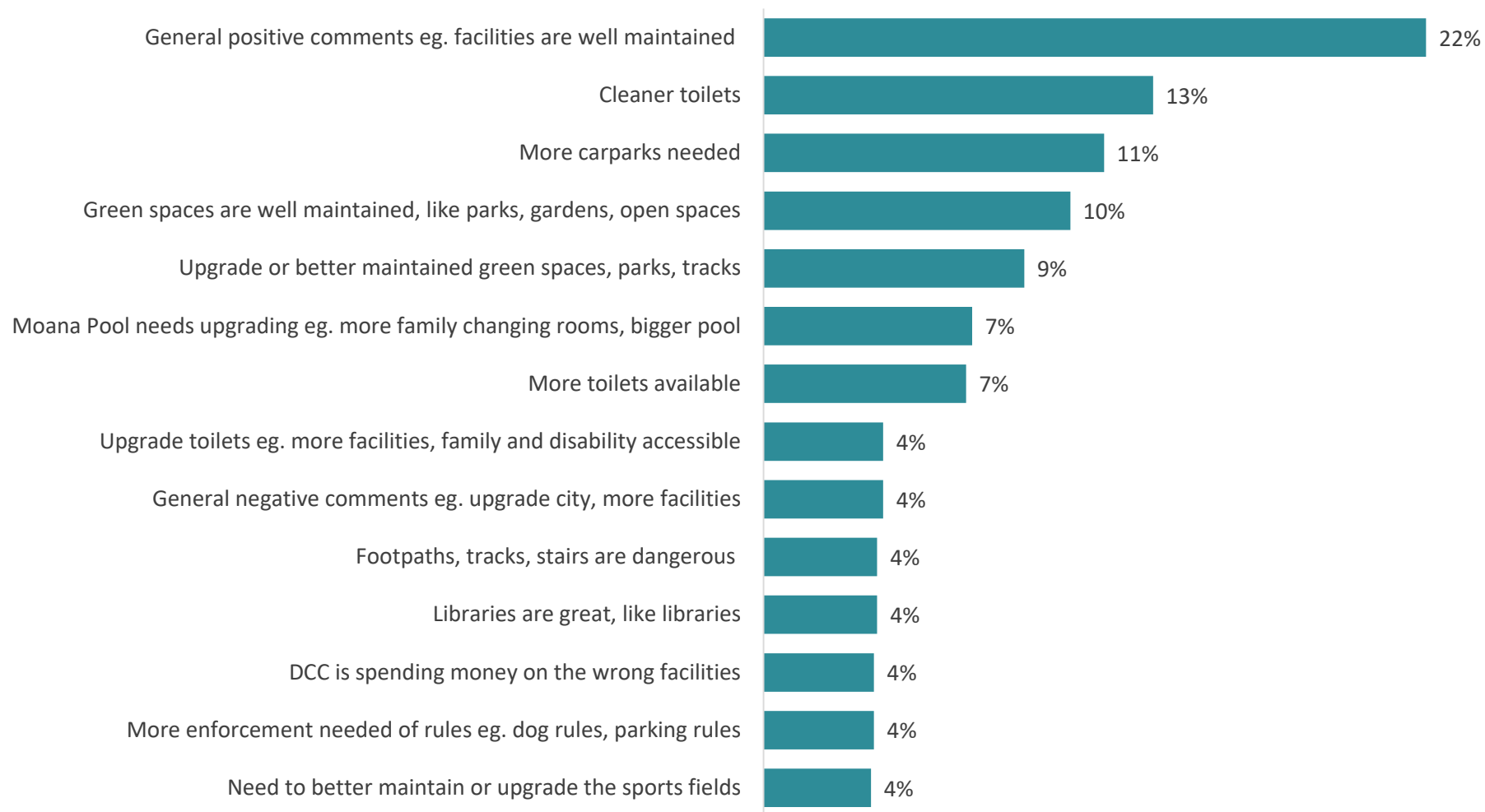
The most notable change in 2019/20 has been a significant decline in user satisfaction with both the Dunedin Town Hall and the Regent Theatre. However it should be noted that both these facilities had a significant increase in positive ratings last year, so this decline has brought them back in line with 2018 ratings.

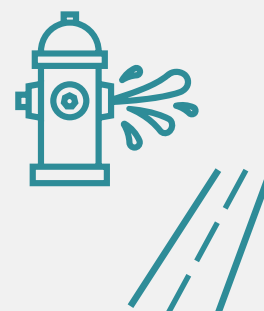




# Comments about Dunedin's facilities in the last year

*Note: This includes any comments on parks, reserves and open space facilities, sports and recreation facilities and other public facilities.*





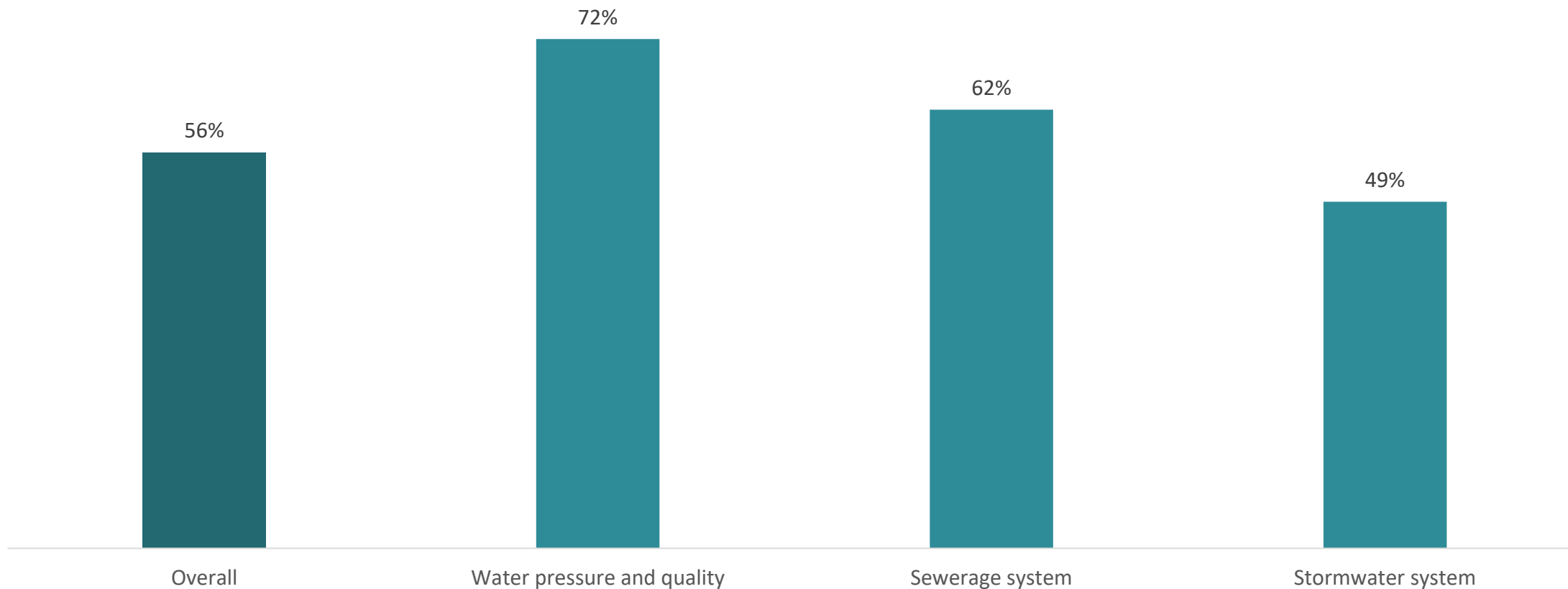
# Infrastructure

Water and Roothing



# Satisfaction with water related infrastructure – 2019/20

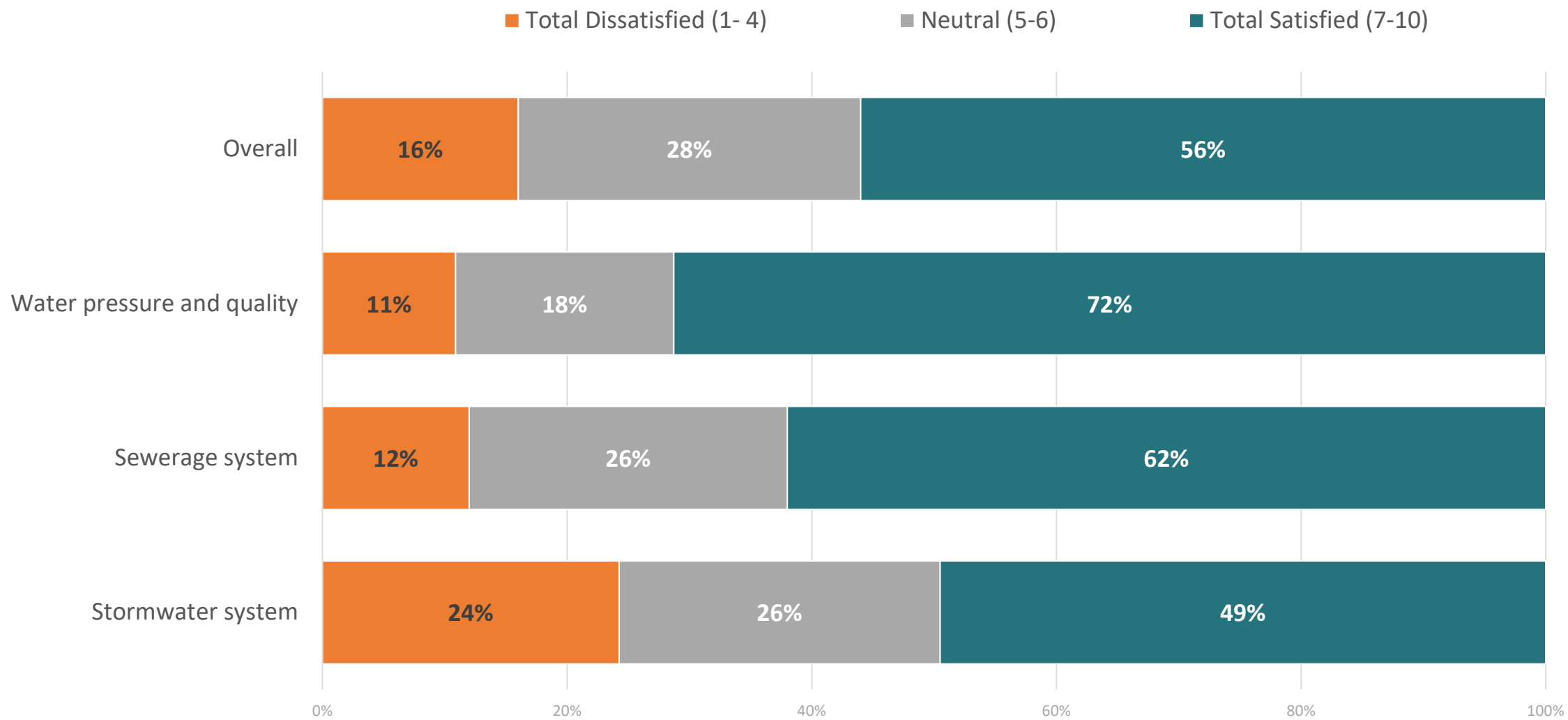
Overall, just over half of all respondents are satisfied with water related infrastructure. Individual satisfaction ratings for 2019/20 are mixed, ranging from 72% for water pressure and quality, to 62% for the sewerage system and 49% for the stormwater system.







# Satisfaction with water supply, stormwater and sewerage – 2019/20

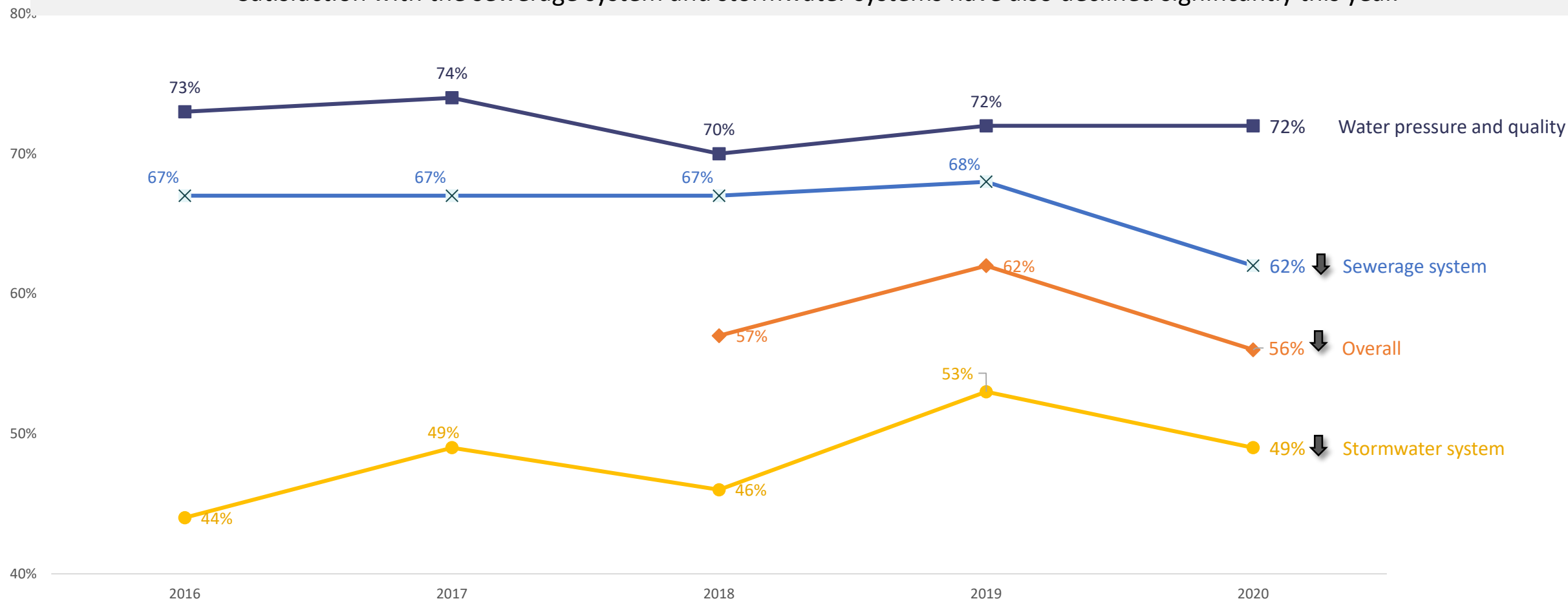




# Satisfaction with water related infrastructure over time

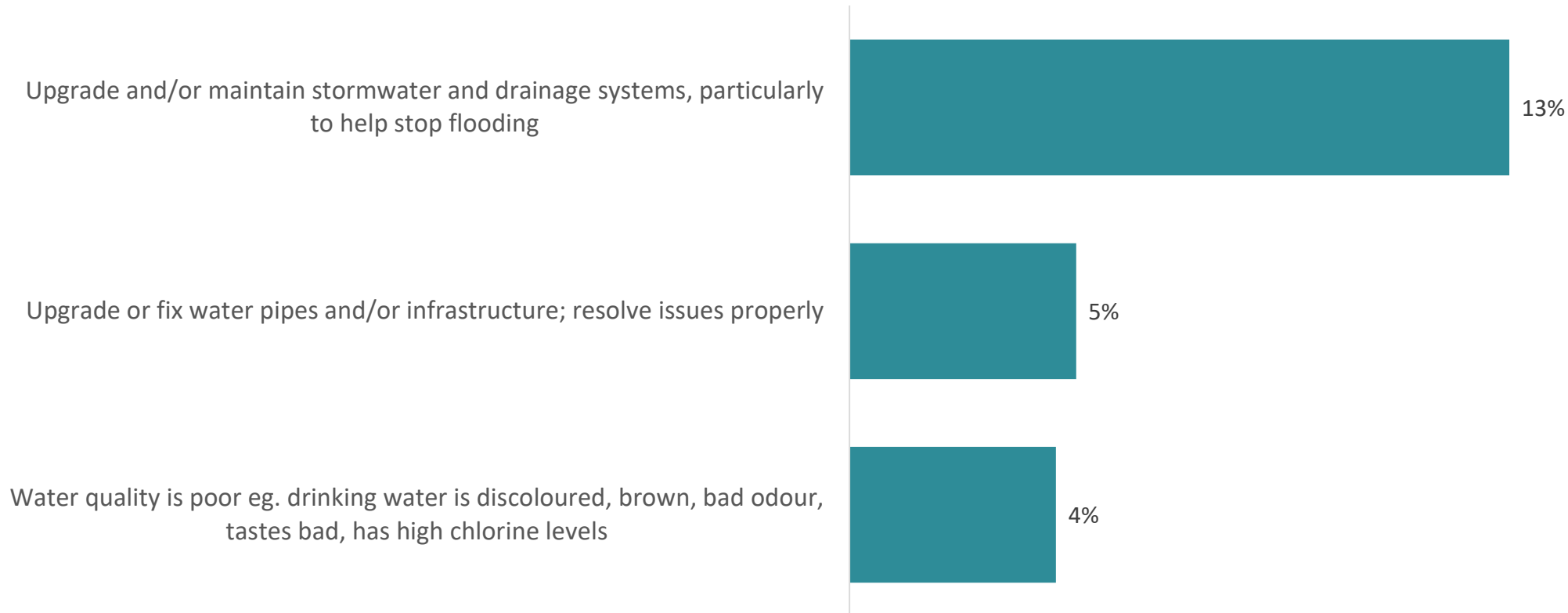
The percentage of residents satisfied with the water infrastructure overall has declined significantly this year and is now comparable with the 2018 satisfaction rating.

Satisfaction with the sewerage system and stormwater systems have also declined significantly this year.





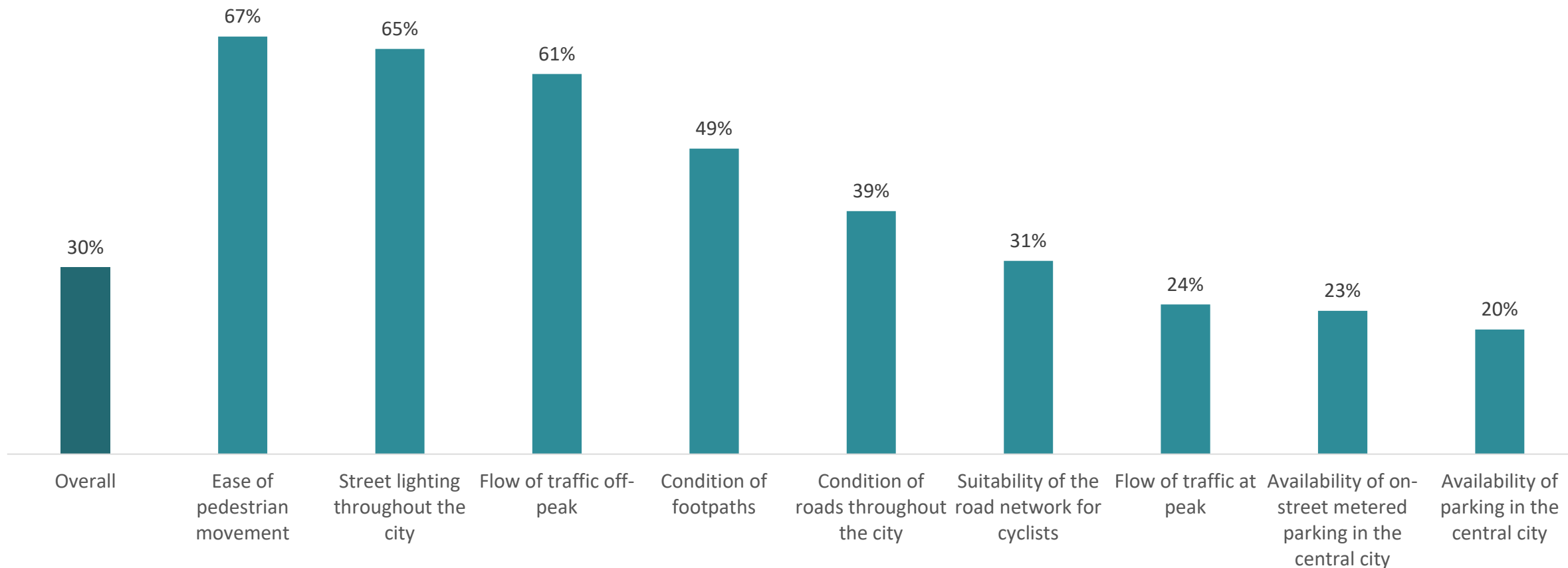
# Comments about water related infrastructure in the last year





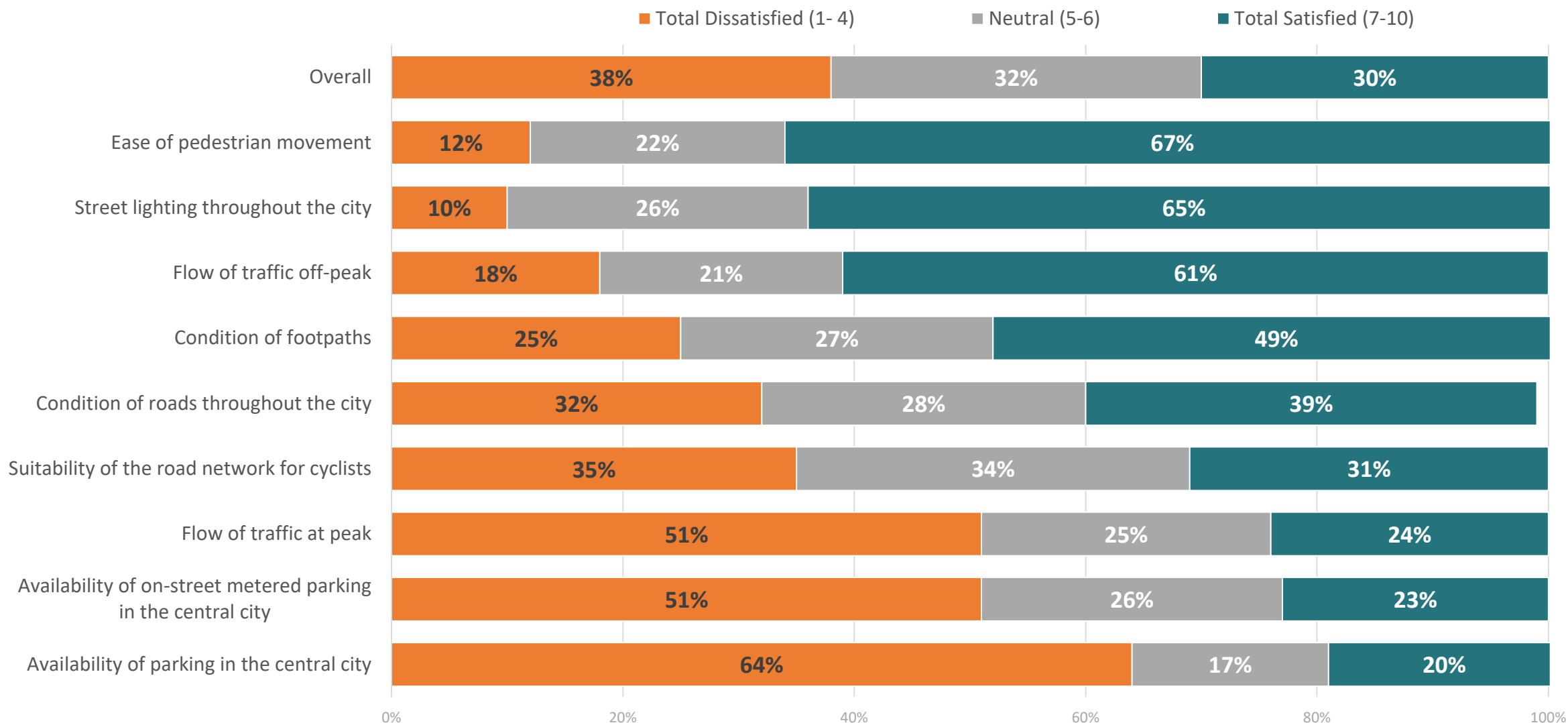
# Satisfaction with roads, footpaths, lighting and parking – 2019/20

In 2019/20, only 30% of all respondents were satisfied overall with roading related infrastructure. Ratings were highest for the ease of pedestrian movement, followed by street lighting and the flow of off-peak traffic. In contrast, respondents were least satisfied with the availability of parking in the central city, the availability of on-street metered parking in the central city and the flow of traffic during peak times.





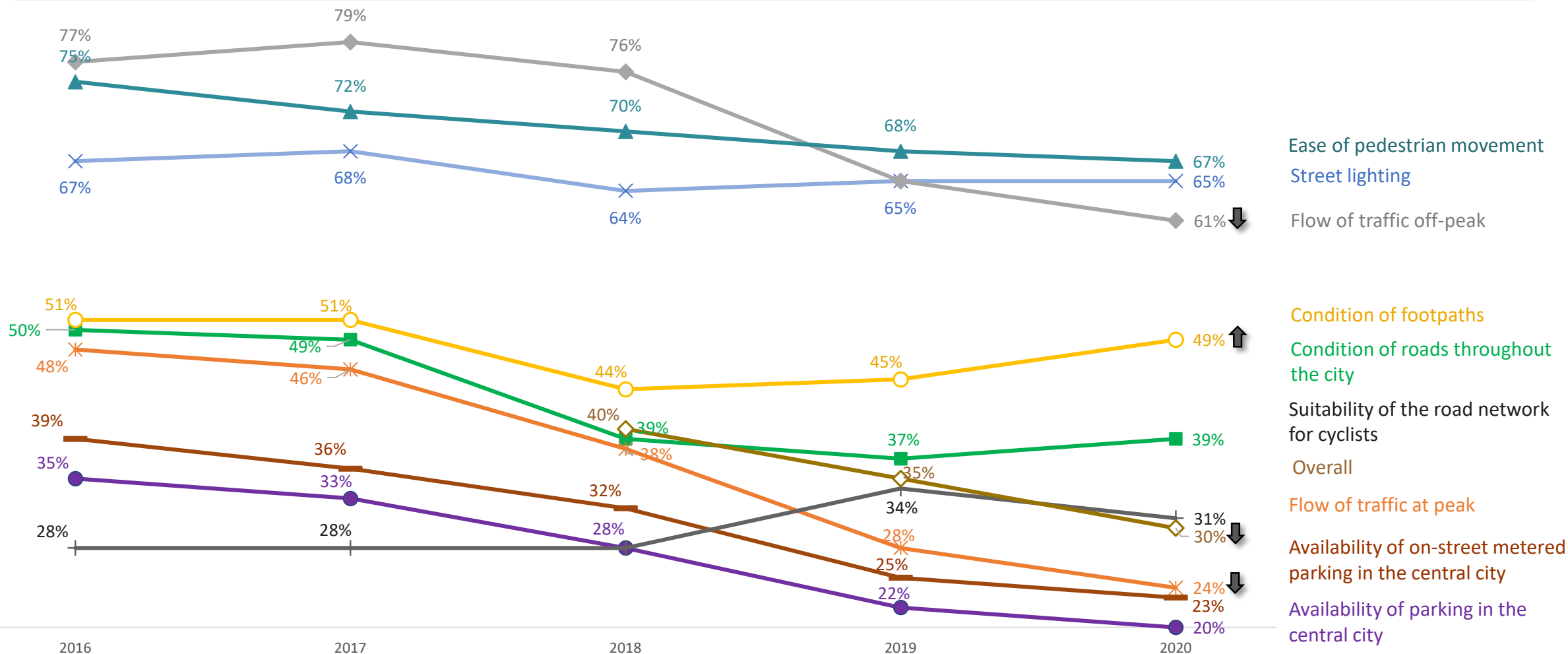
# Satisfaction with roads, footpaths, lighting and parking – 2019/20





# Satisfaction with roads, footpaths, lighting and parking over time

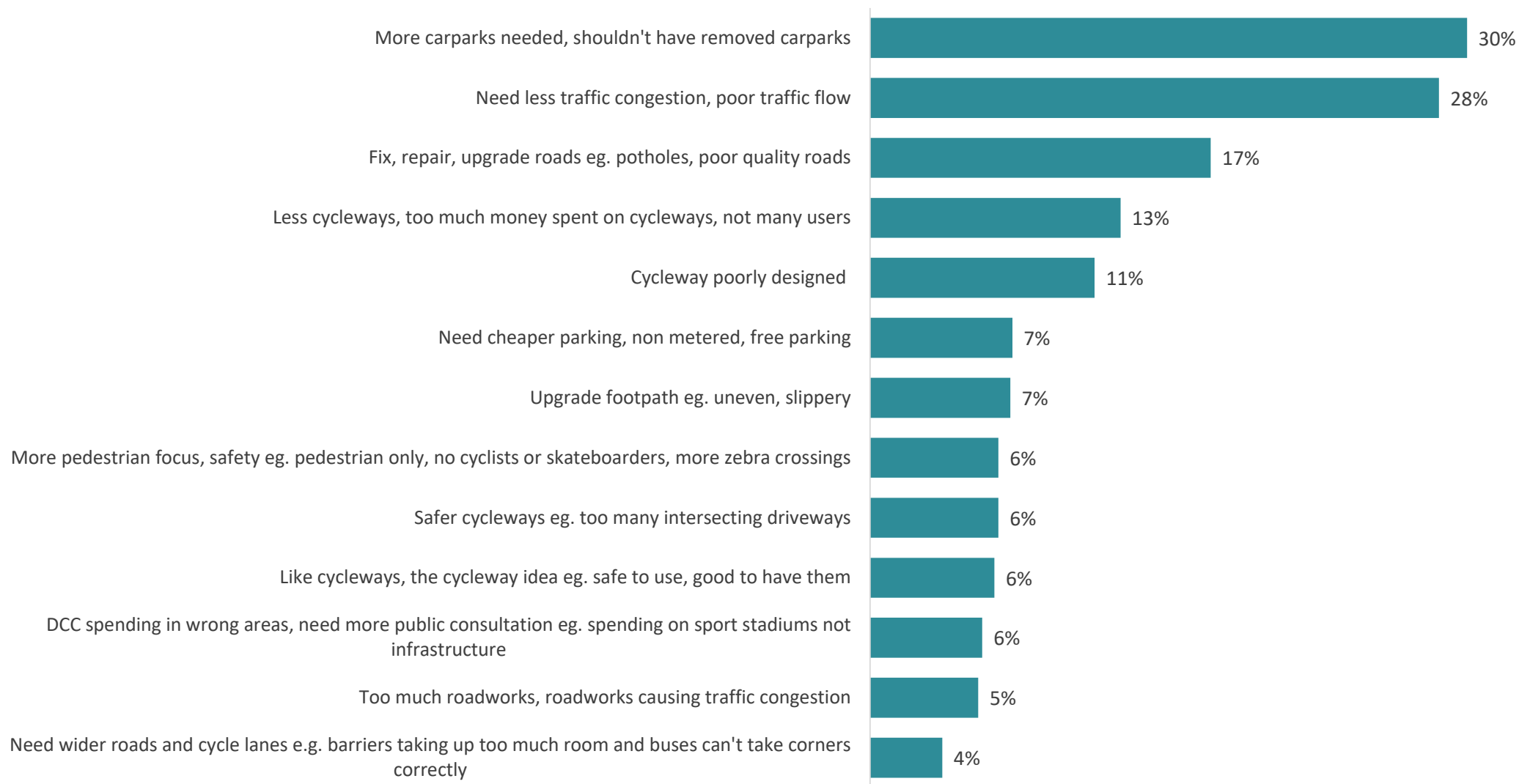
Satisfaction with the condition of footpaths has increased significantly this year.  
In contrast, satisfaction with roading related infrastructure overall and the flow of traffic both at peak and off peak times have all declined significantly for the second consecutive year.







# Comments about roading related infrastructure in the last year





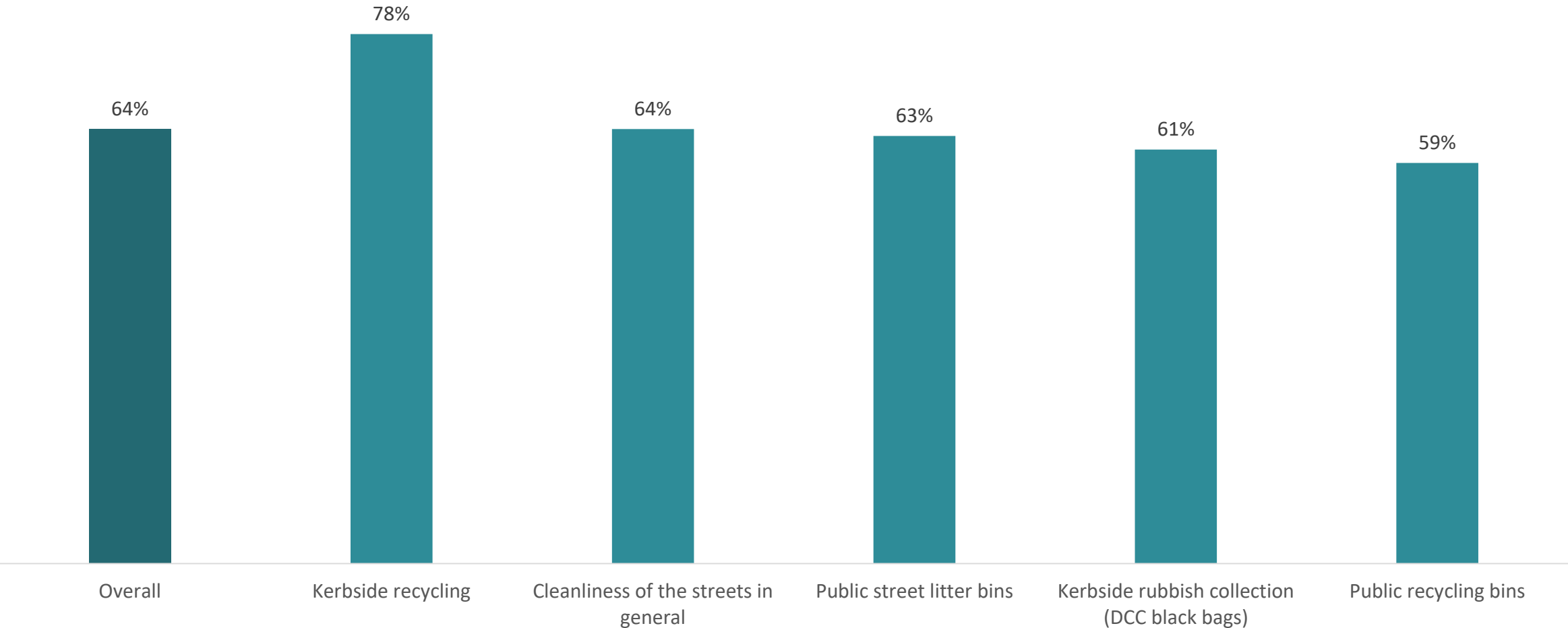
# Services

Waste Management and Regulatory



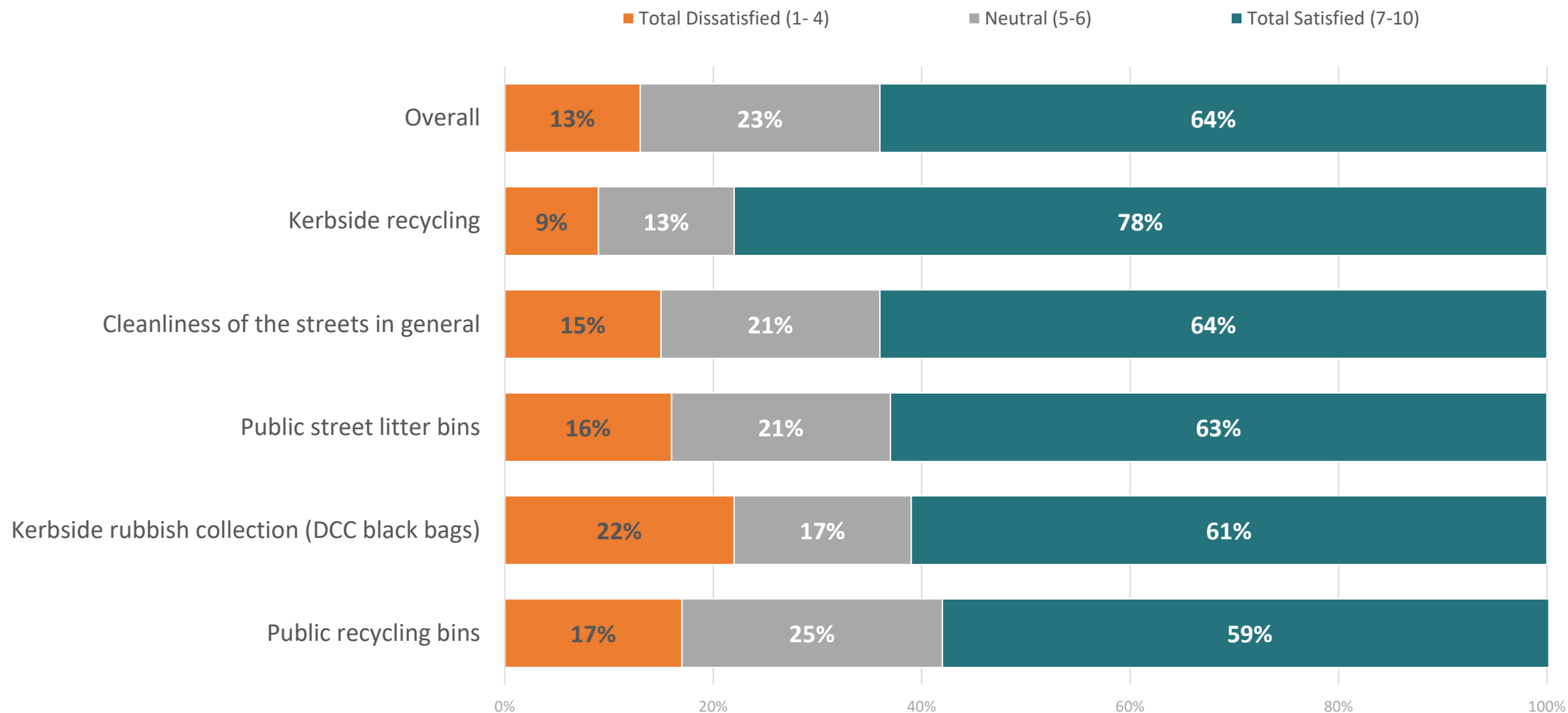
# Satisfaction with waste management - 2019/20

Overall, just less than two thirds of respondents are satisfied with waste management services.  
Positive ratings are highest for kerbside recycling and lowest for public recycling bins.





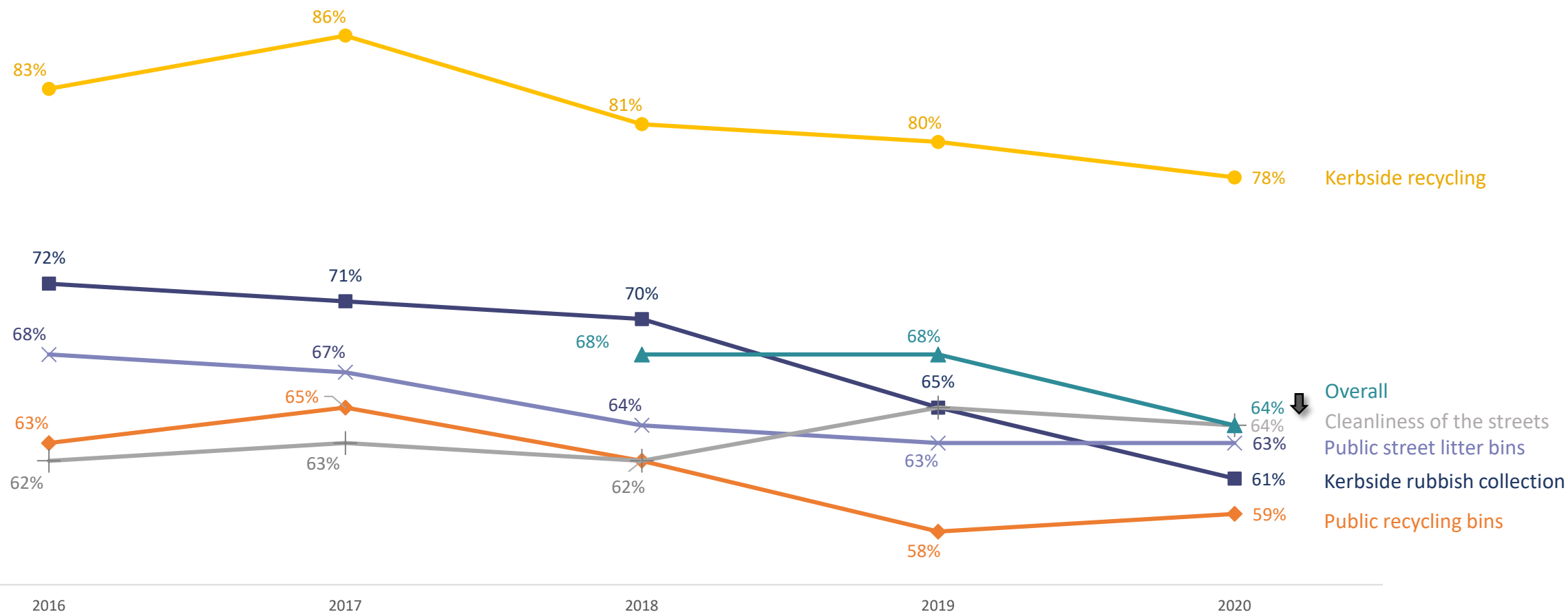
# Satisfaction with waste management – 2019/20





# Satisfaction with waste management over time

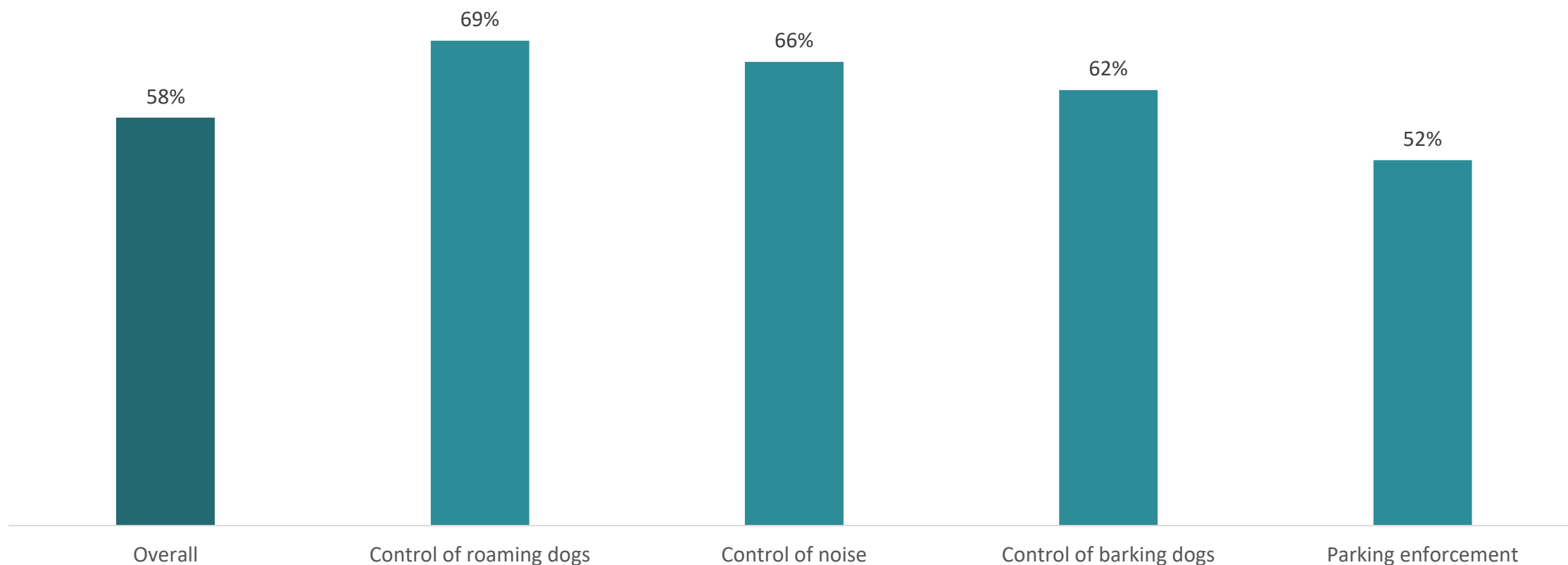
Overall satisfaction with waste management services has declined significantly, while satisfaction with all individual aspects of waste management remain relatively stable compared to last year.





# Satisfaction with regulatory services – 2019/20

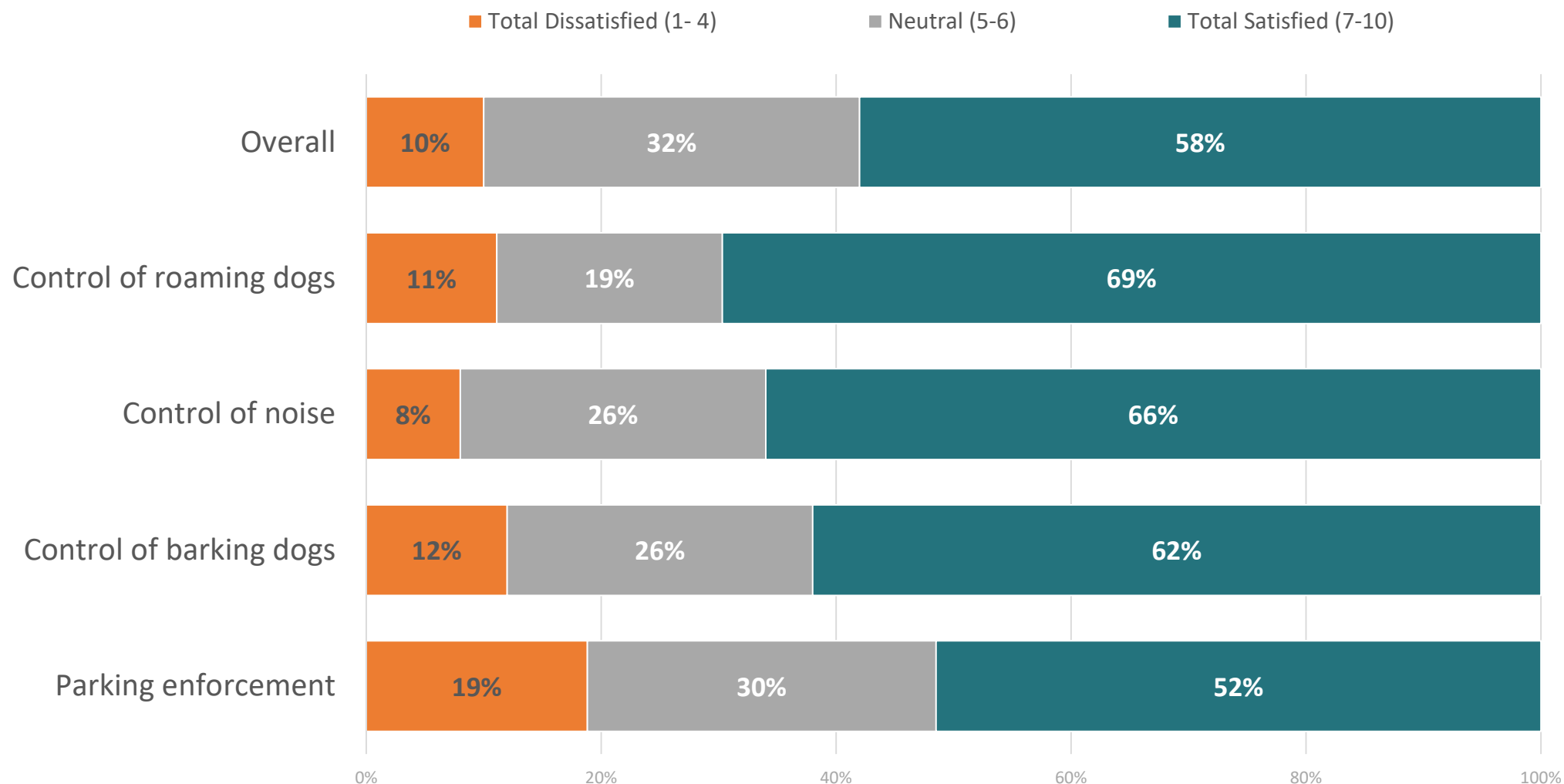
In 2019/20, 58% of respondents are satisfied with regulatory services overall.  
Satisfaction ratings were highest for control of roaming dogs and lowest for parking enforcement.







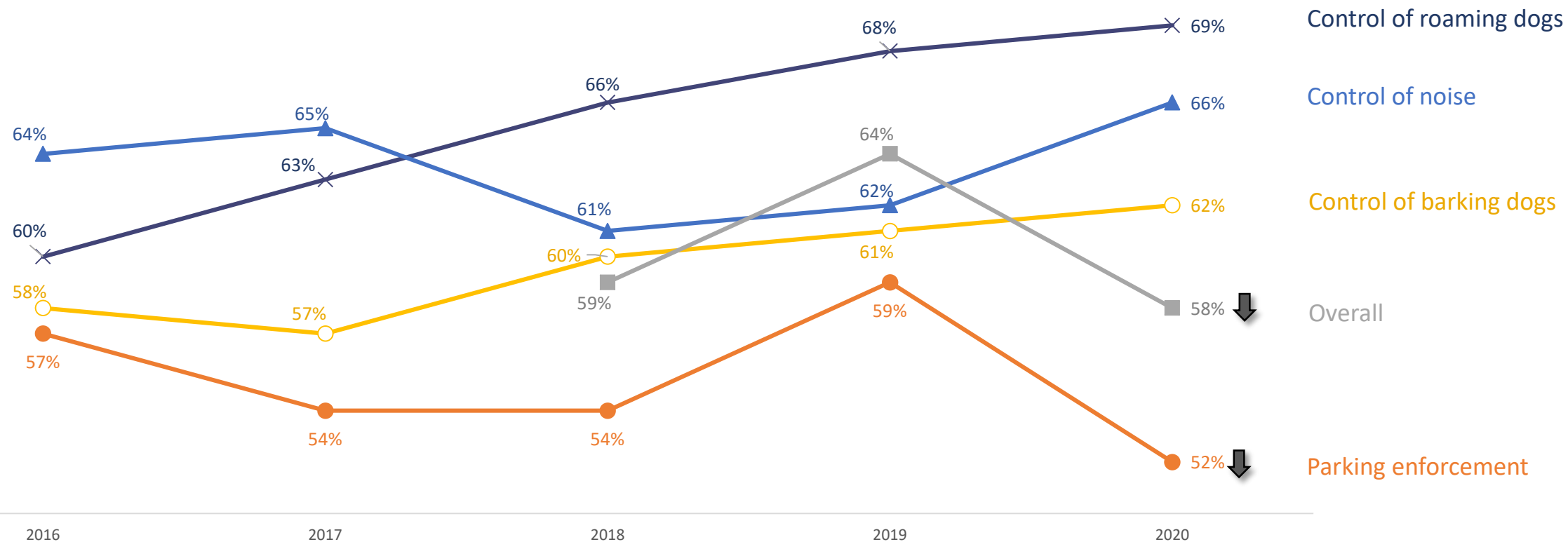
# Satisfaction with regulatory services – 2019/20





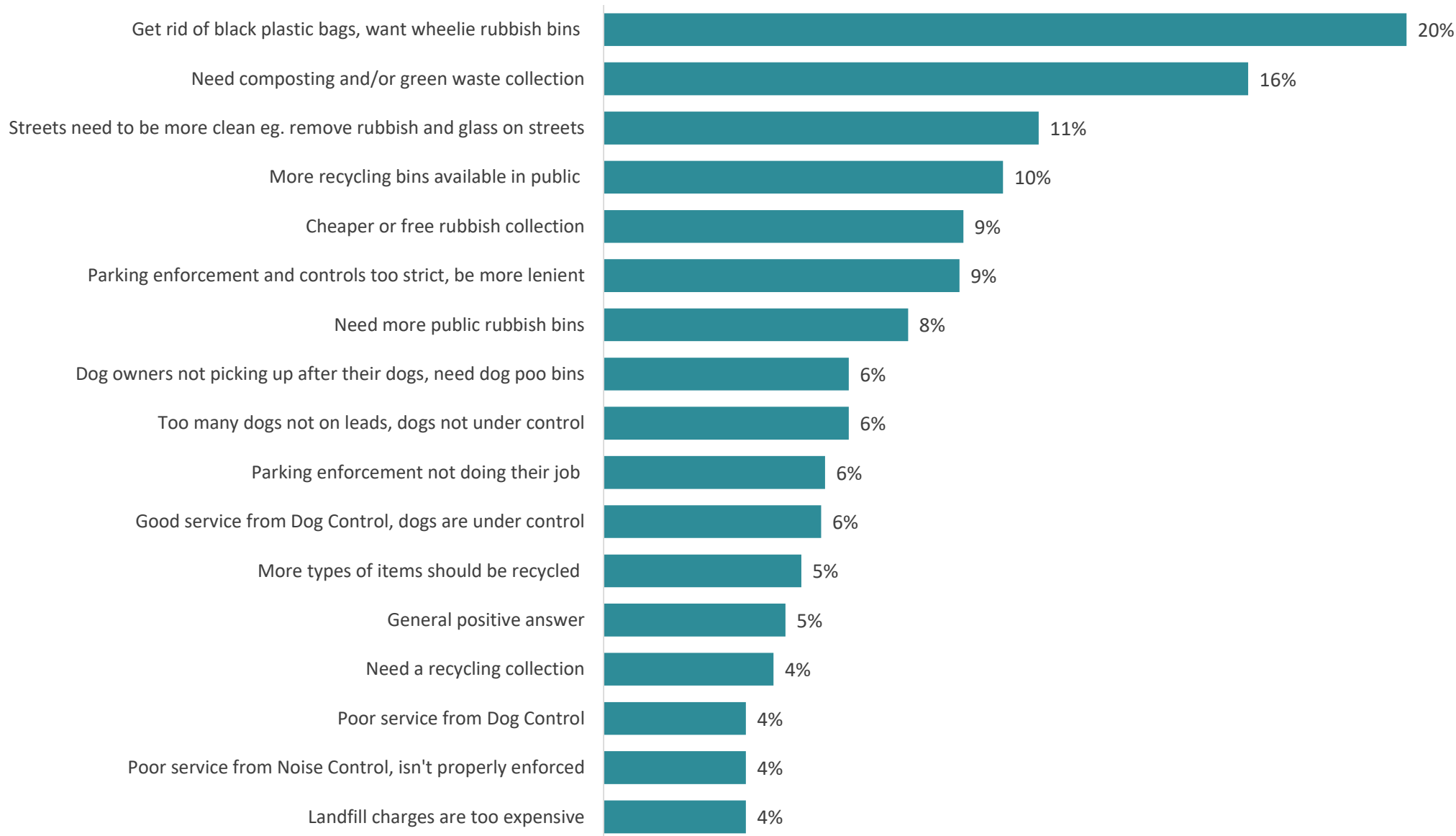
# Satisfaction with regulatory services over time

Overall satisfaction with regulatory services and satisfaction with parking enforcement have both declined significantly, however satisfaction with both are now similar to 2018 ratings.





# Comments about Dunedin's services



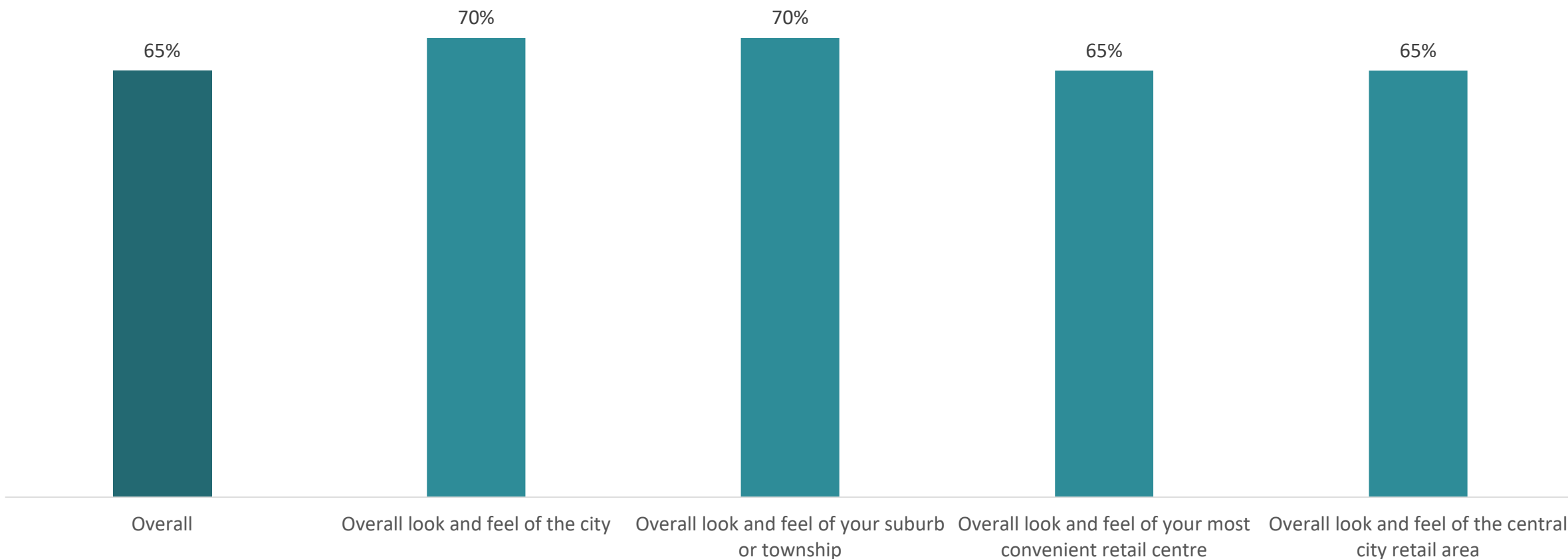


# Planning and Urban Design



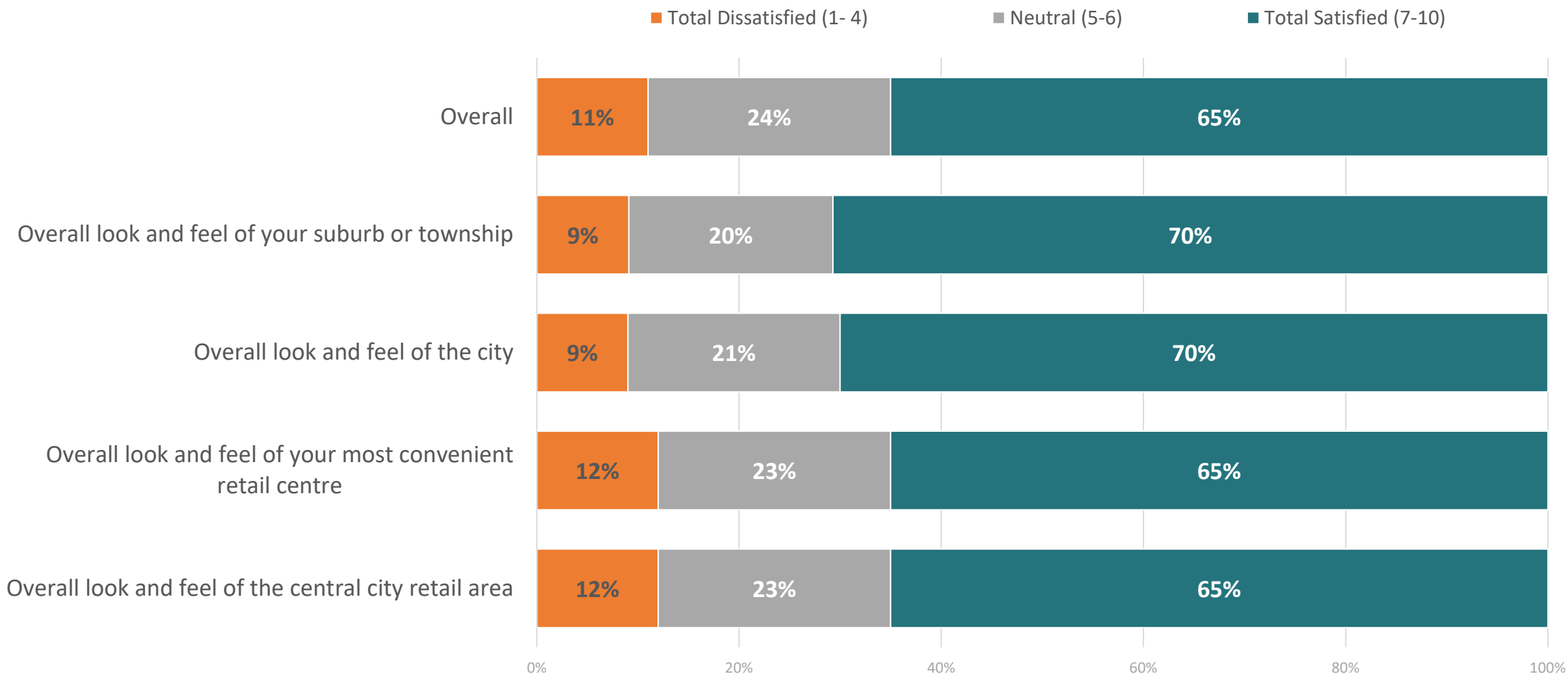
# Satisfaction with planning and urban design – 2019/20

Around two thirds of respondent's (65%) are satisfied with the way the city is developing overall in terms of planning and urban design. Ratings are similar across all the individual attributes.





# Satisfaction with planning and urban design – 2019/20

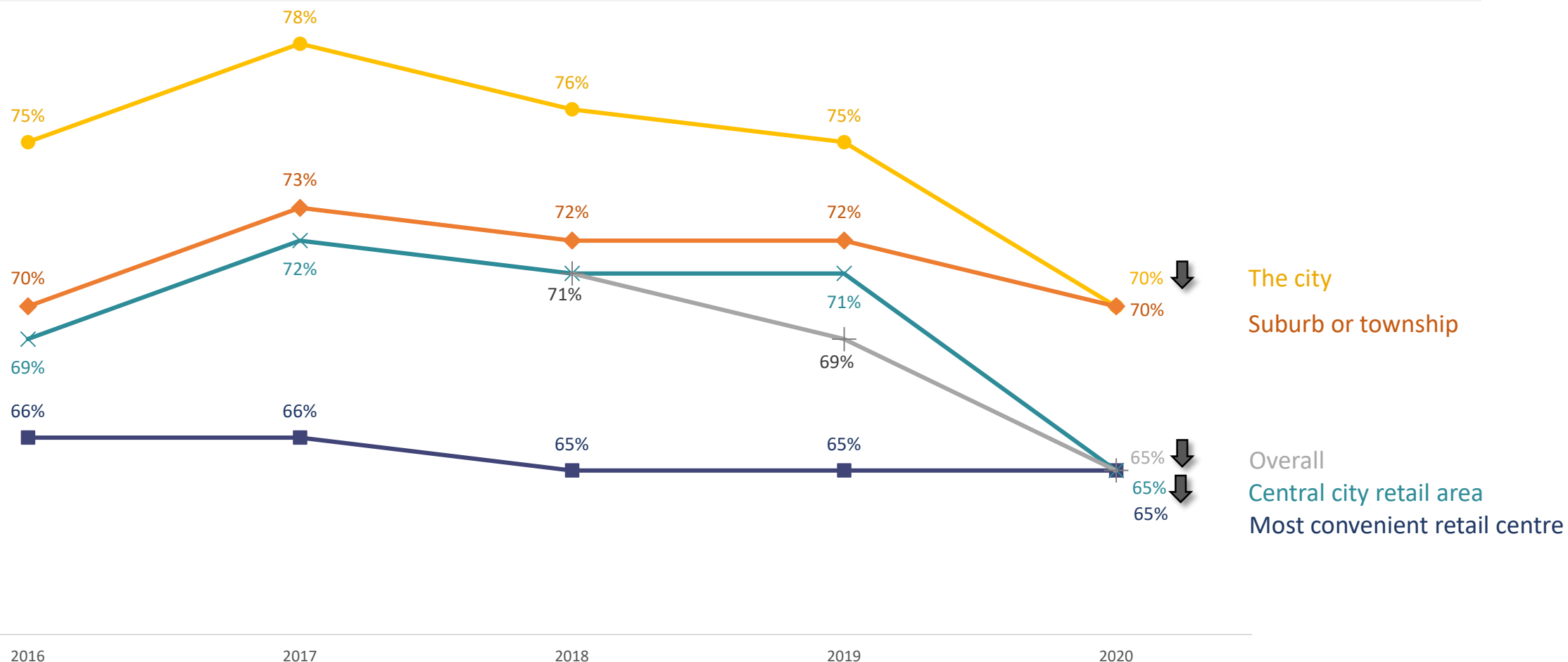






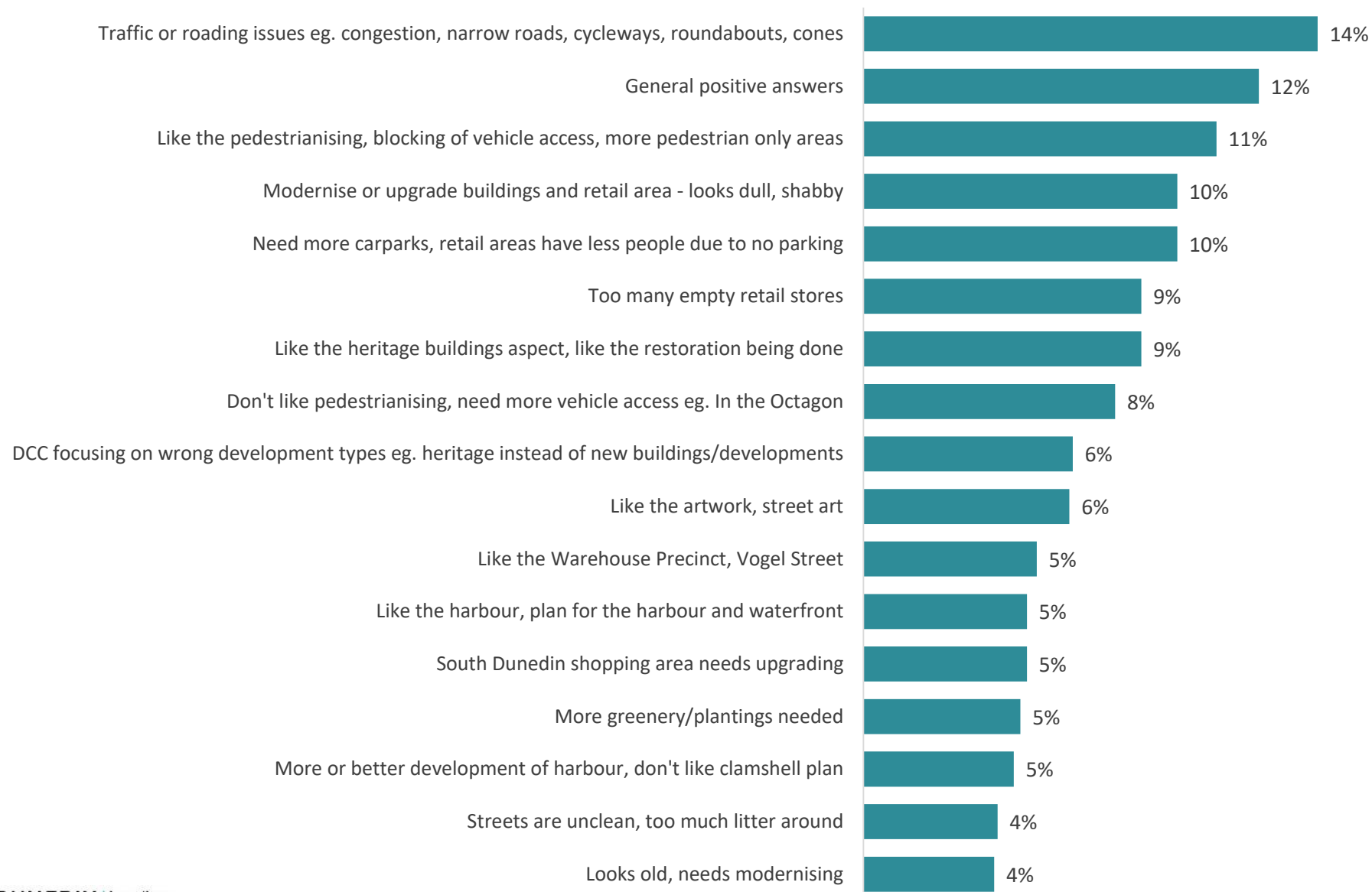
# Satisfaction with planning and urban design over time

Satisfaction with the way the city is developing overall, the overall look and feel of the city and the overall look of the central city retail area have all declined significantly since last year.





# Comments about the look and feel of the city



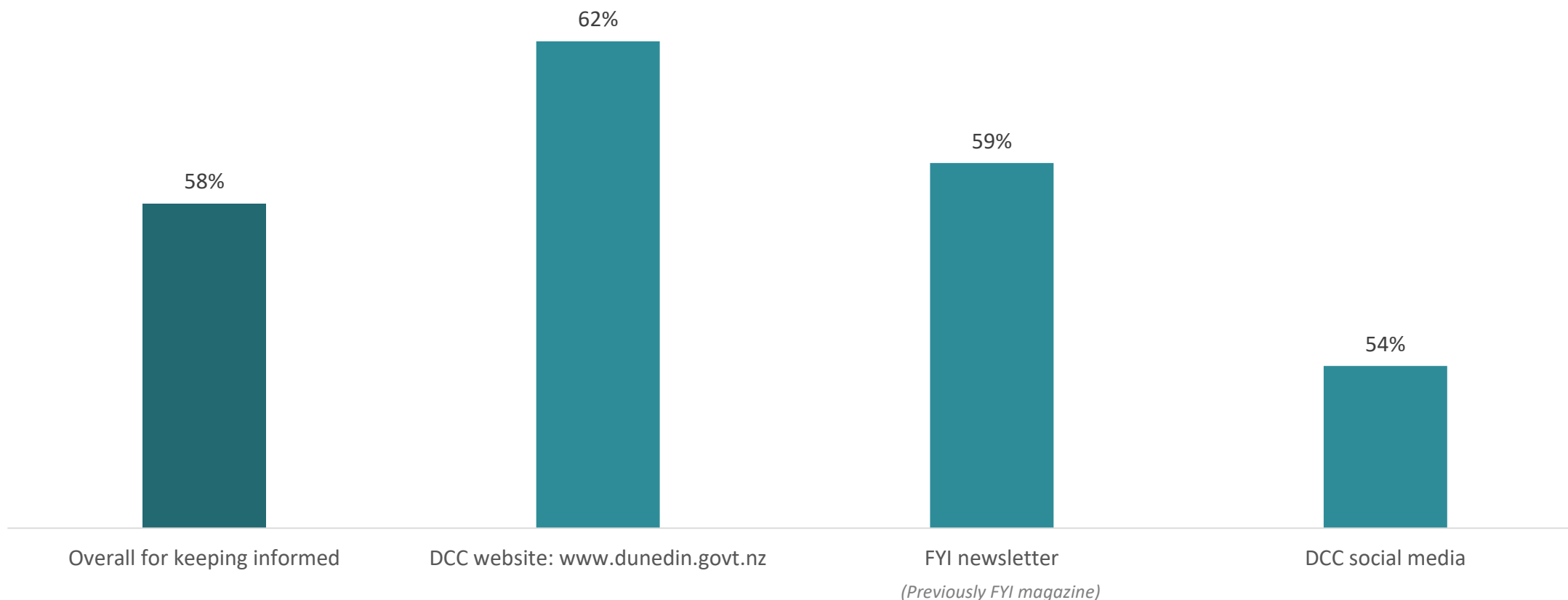


## Contact and Information



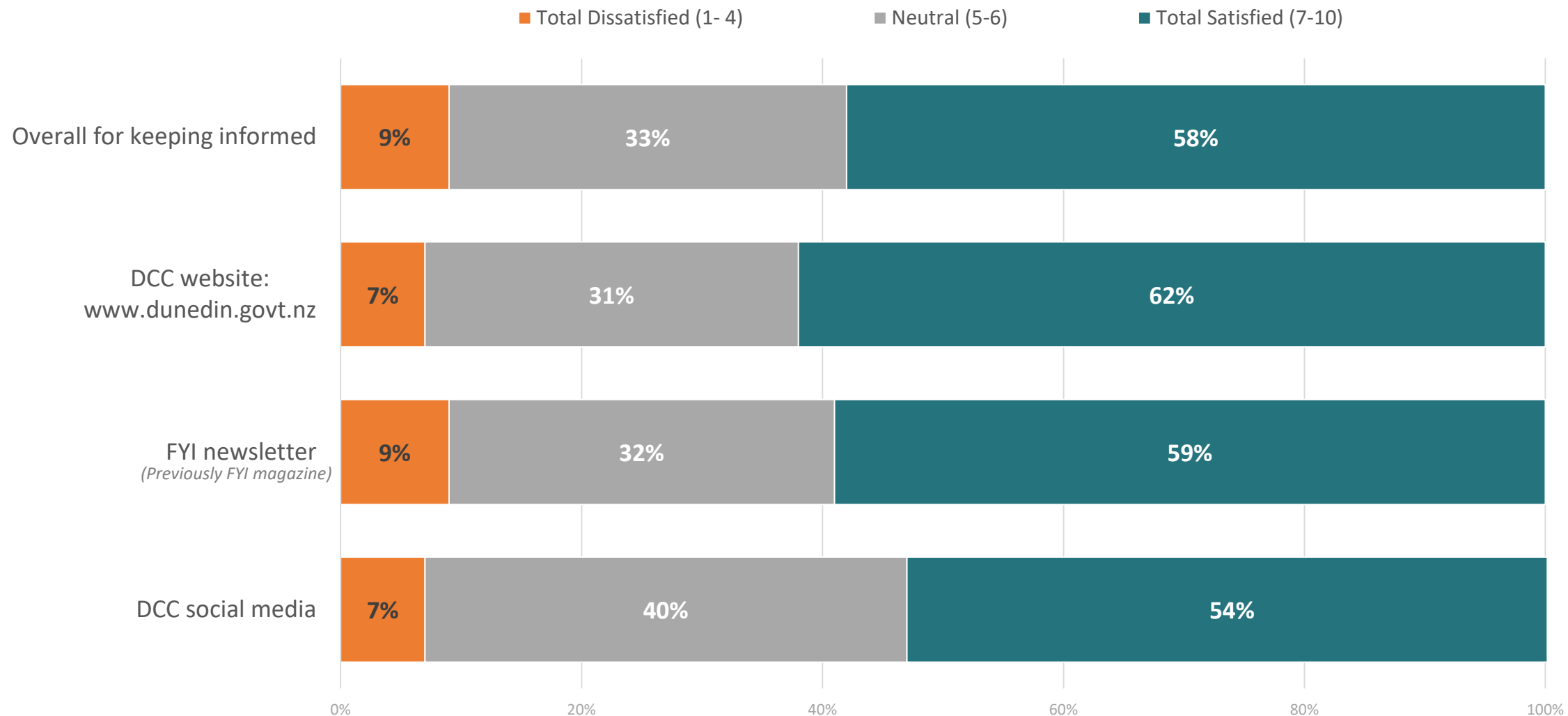
# Satisfaction with communication channels – 2019/20

Overall, 58% of respondents are satisfied with how well DCC keeps residents informed.  
Satisfaction ratings are highest for the DCC website and lowest for DCC social media.





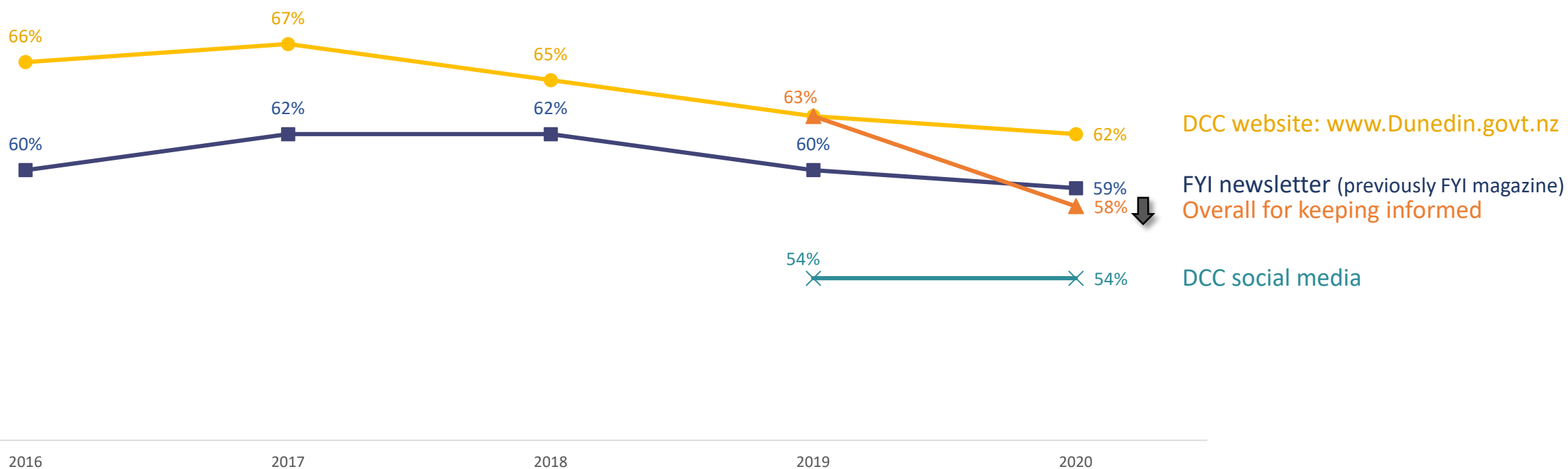
# Satisfaction with communication channels – 2019/20





# Satisfaction with communication channels over time

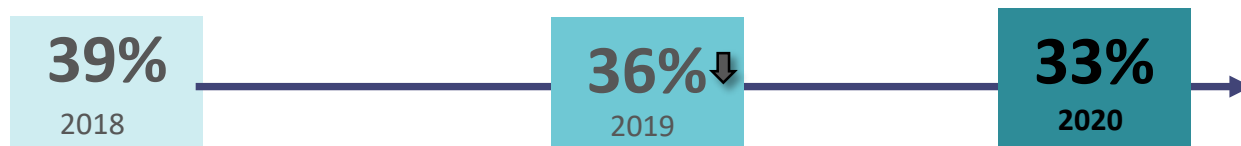
Overall satisfaction with how well DCC keeps residents informed has declined significantly.  
Satisfaction with the DCC website, FYI newsletter (previously FYI magazine) and DCC social media remain stable.





# Interacting with Dunedin City Council staff

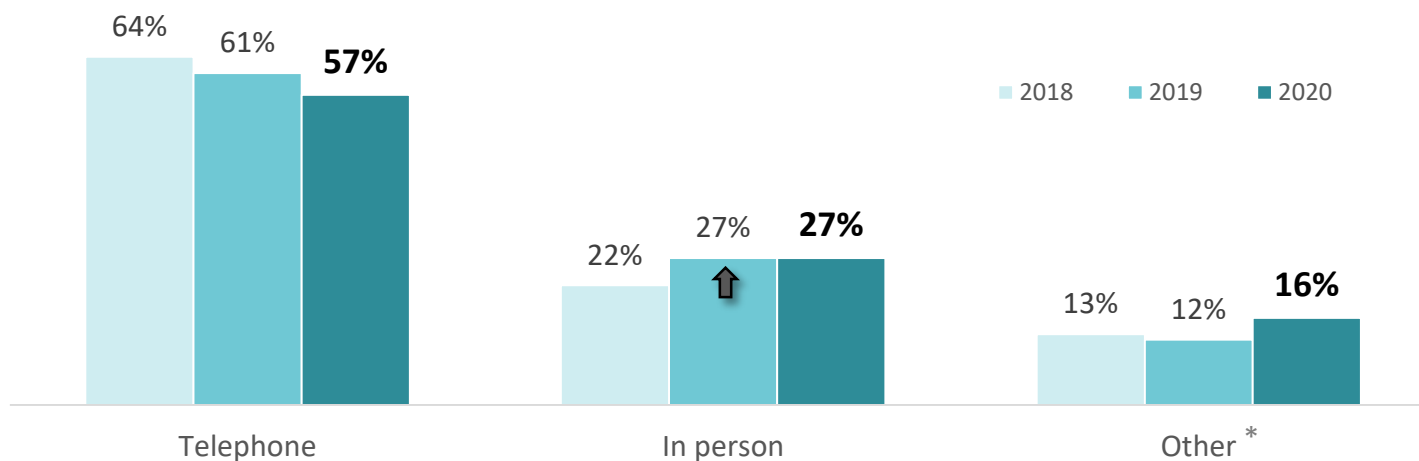
Have contacted DCC staff in the last three months



There has been a 3% decline, year on year since 2018, in the percentage of respondents who have interacted with DCC staff in the previous three months. However, the decline this year is not significant.

*(Those who had contact)*

Form of contact with DCC Staff over time



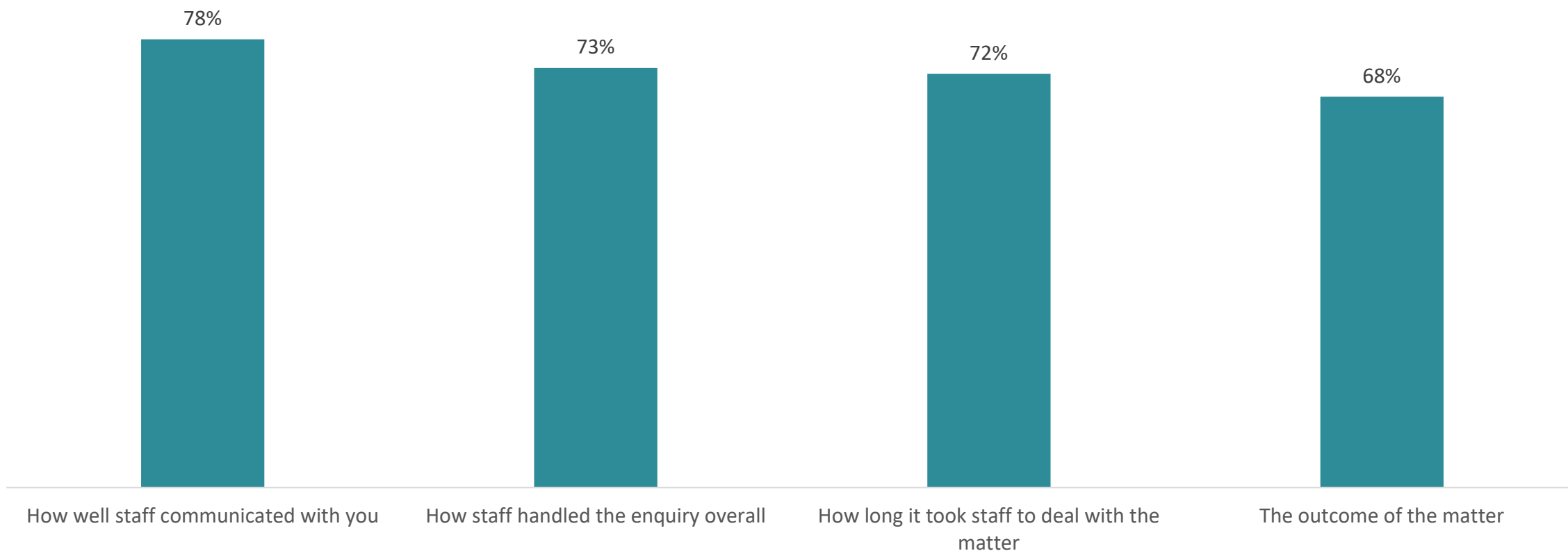
Over half of those who had made contact, had done so by phone.





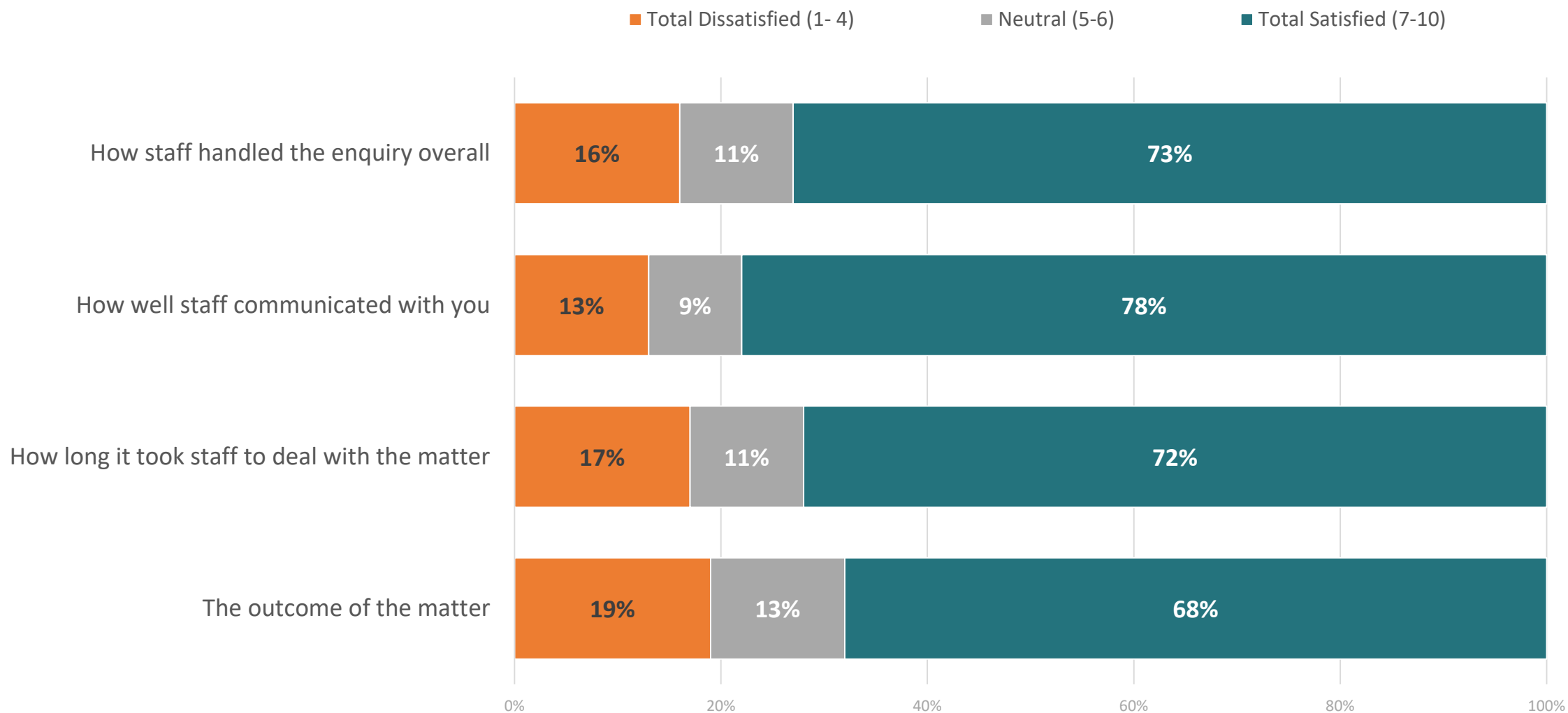
# Satisfaction with Dunedin City Council staff – 2019/20

Respondents who had contact in the last three months are most satisfied with how well staff communicated with them and how staff handled the enquiry overall. Respondents were least satisfied with the outcome of the matter.





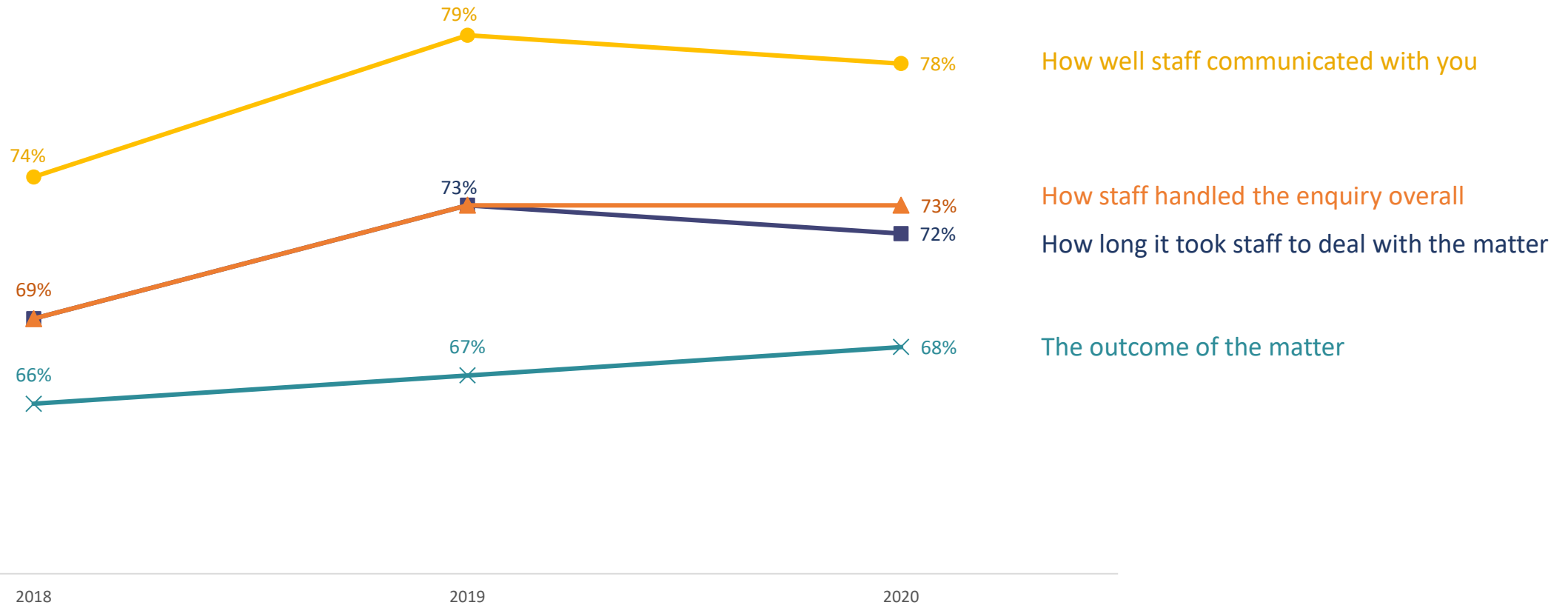
# Satisfaction with Dunedin City Council staff – 2019/20





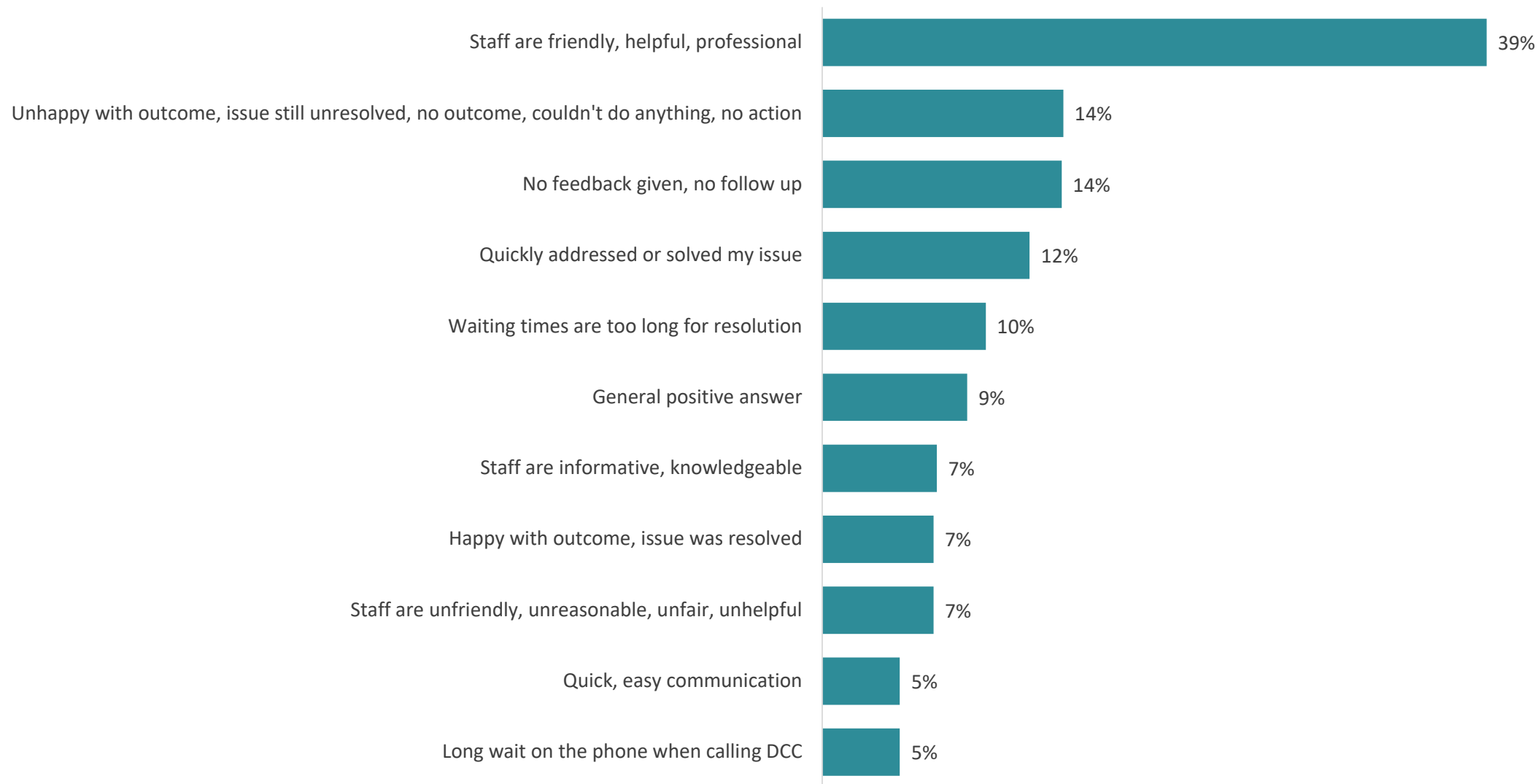
# Satisfaction with Dunedin City Council staff over time

All measures remain stable from last year.



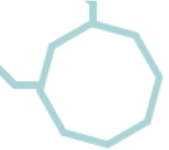


# Comments about interacting with Dunedin City Council staff



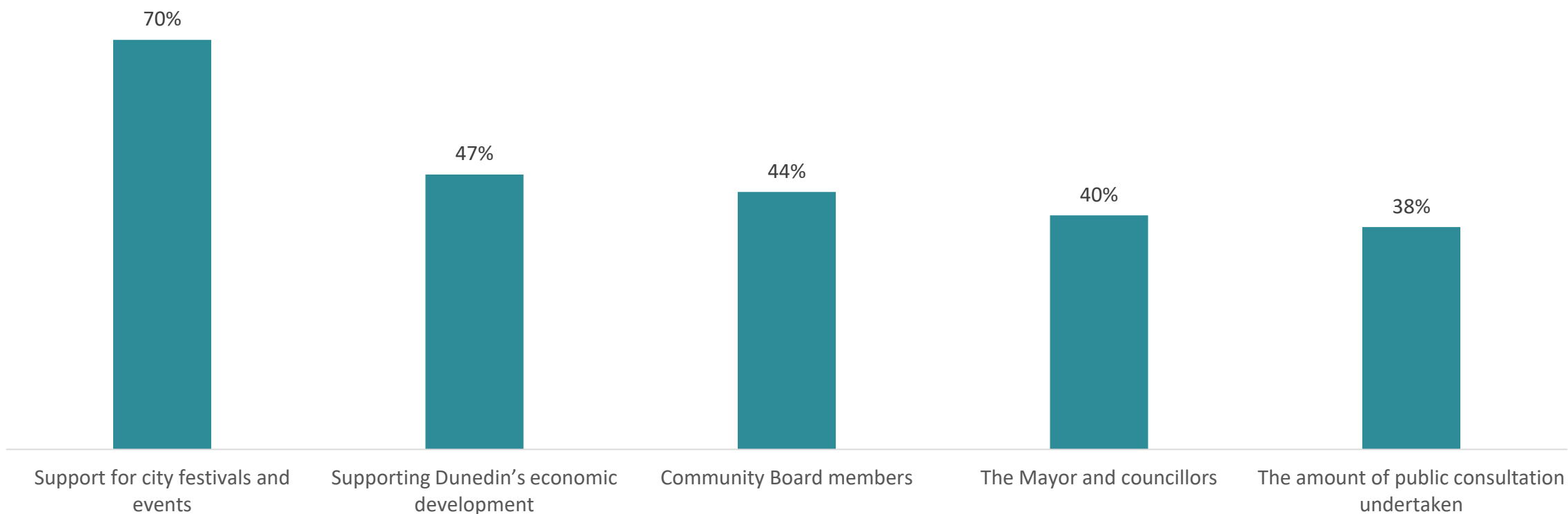


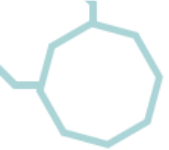
## Leadership & Overall Satisfaction



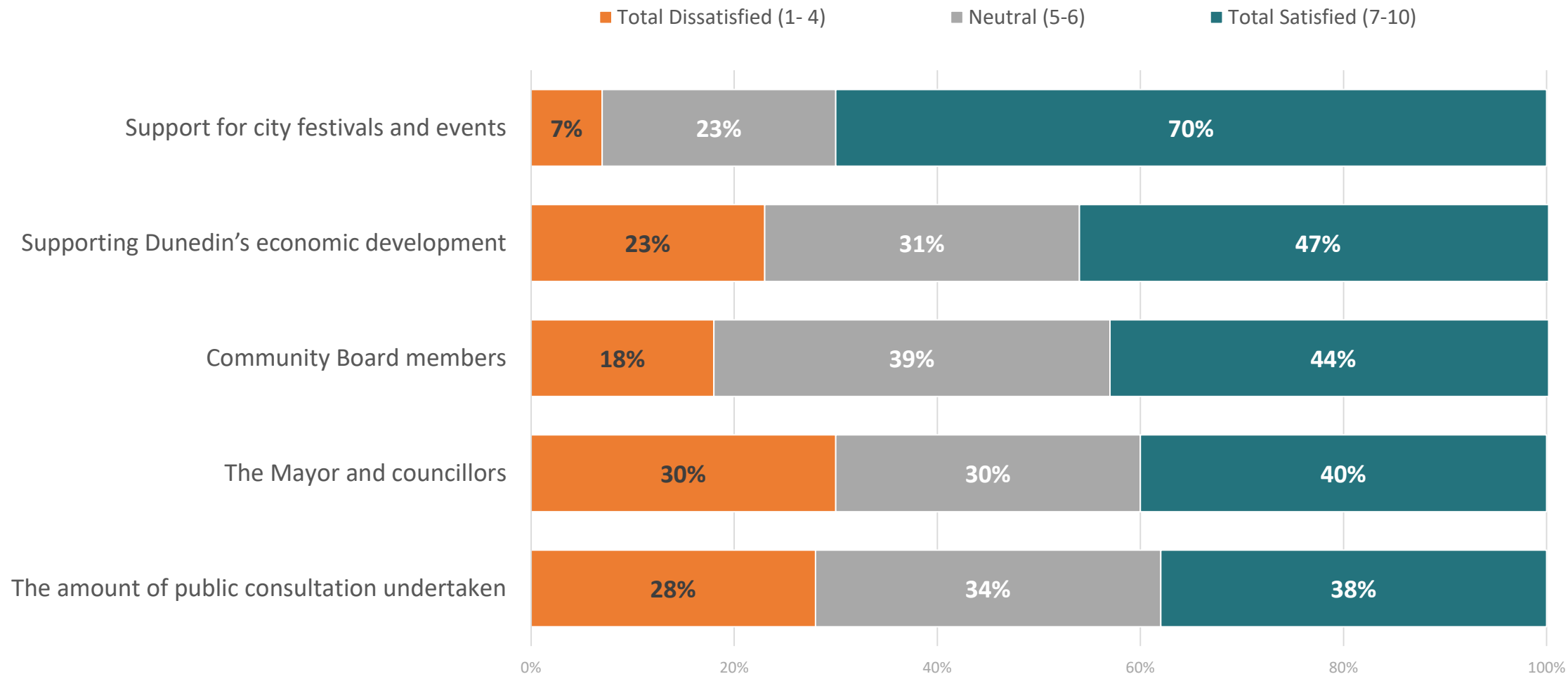
# Satisfaction with Dunedin City Council leadership – 2019/20

Satisfaction is highest for Council's support for city festivals and events. Less than half of respondents were satisfied with the other four leadership measures, including only 38% giving a rating of 7 or higher for the amount of public consultation undertaken.

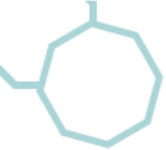




# Satisfaction with Dunedin City Council leadership – 2019/20

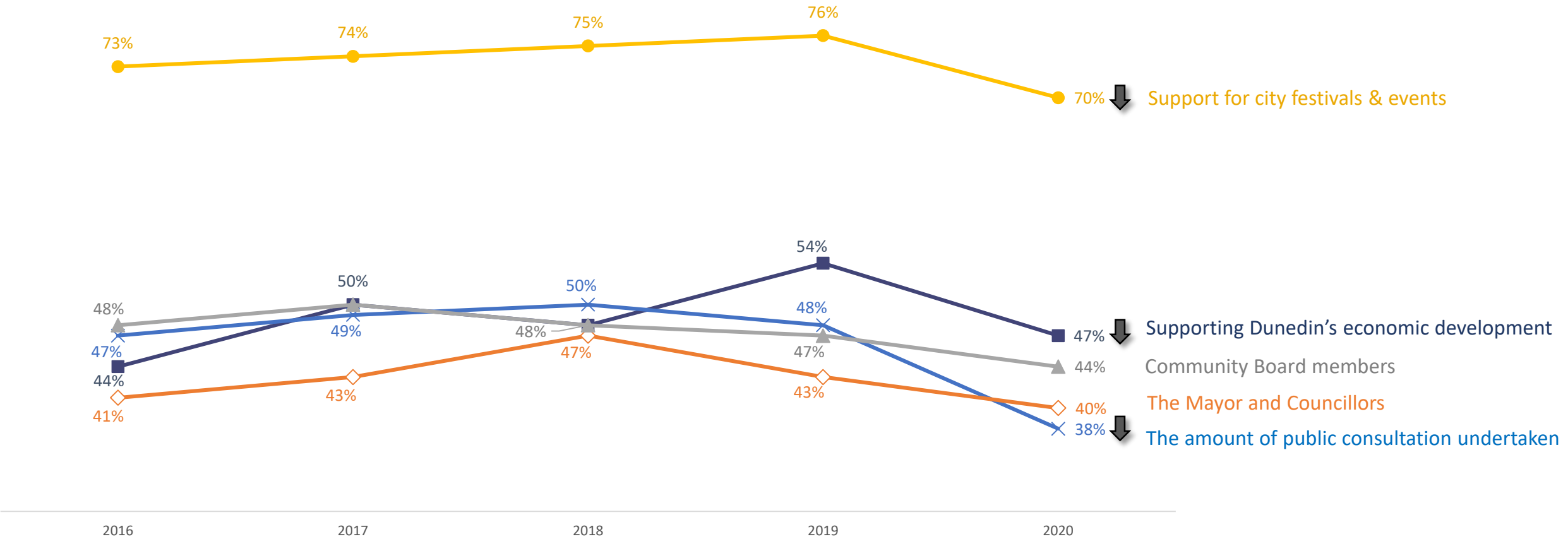






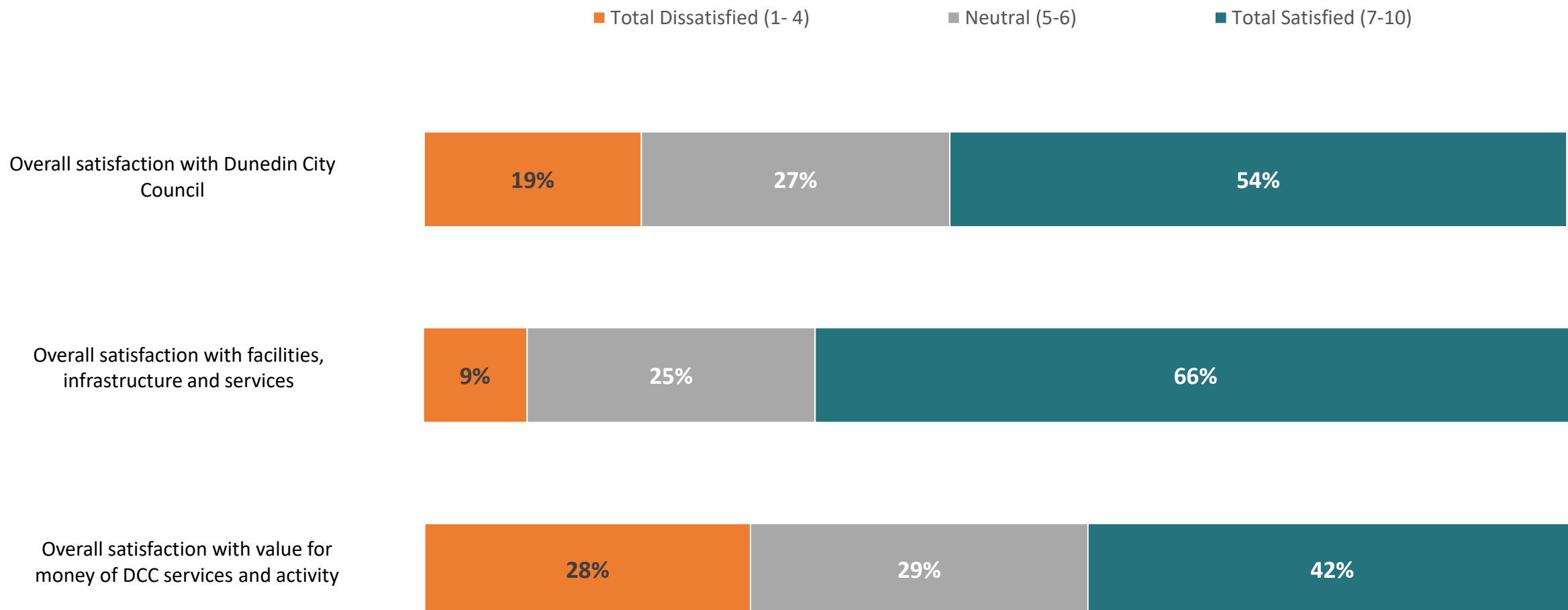
# Satisfaction with Dunedin City Council leadership over time

Ratings for Council’s support for city festivals and events and Dunedin’s economic development, along with satisfaction with the amount of public consultation undertaken, have all declined significantly since last year.





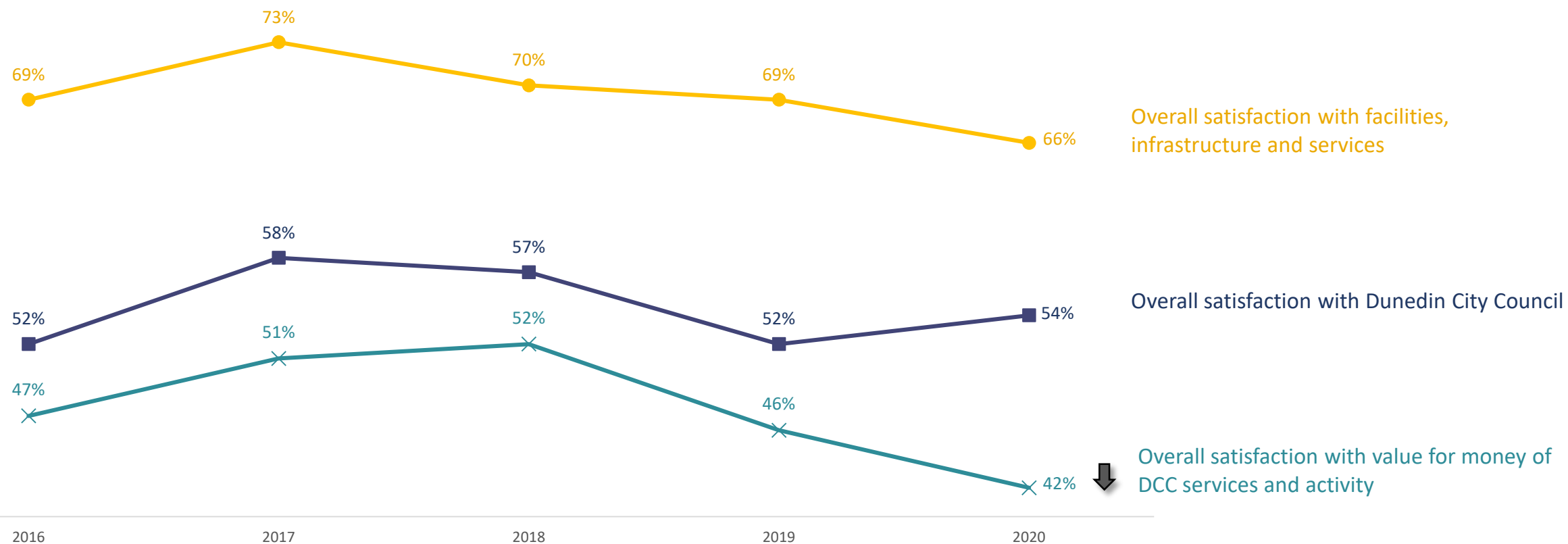
# Overall satisfaction ratings





# Overall satisfaction ratings

Satisfaction ratings are high for facilities, infrastructure and services overall, while value for money of DCC services and activity has decreased significantly for the second consecutive year.



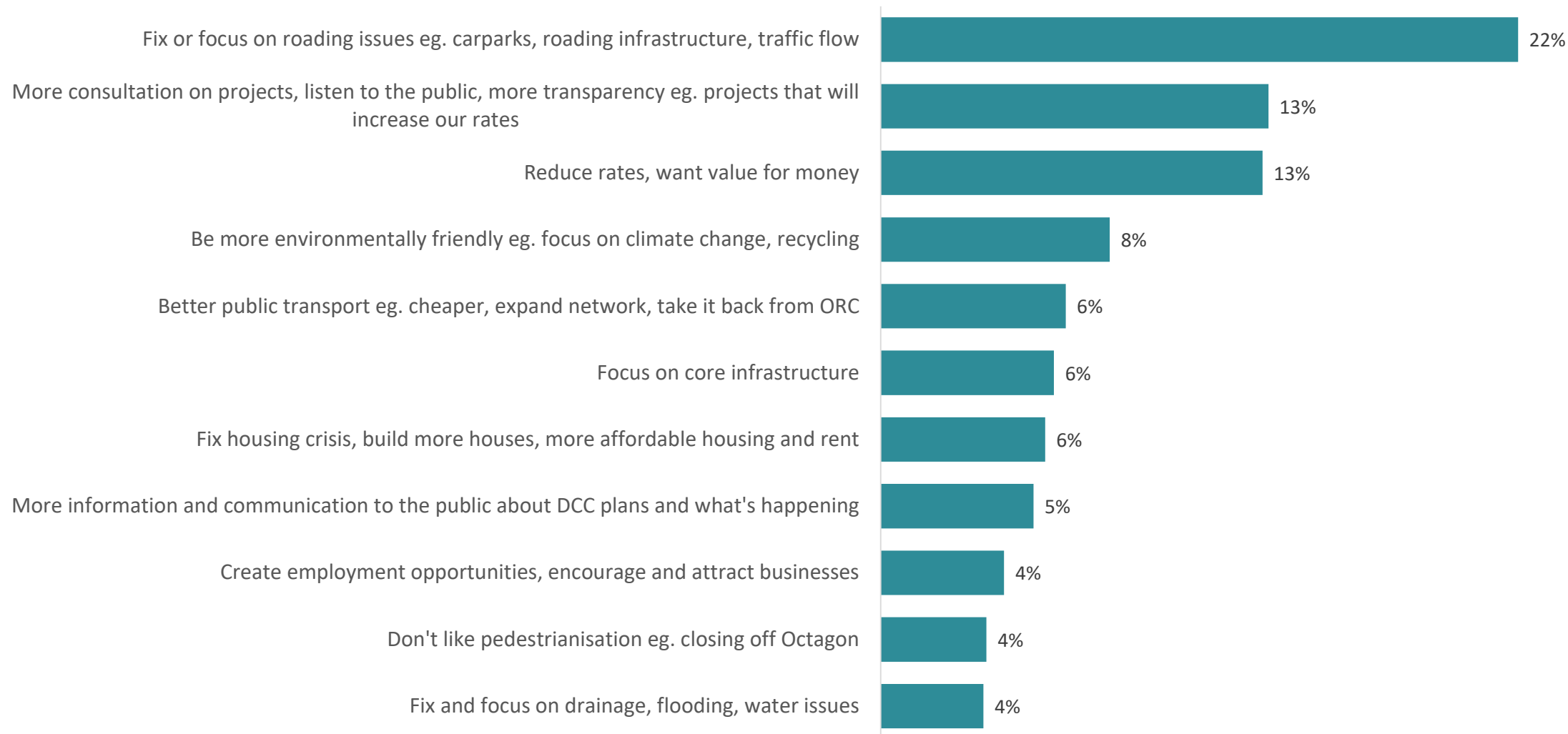


# Comments on the performance of DCC in the last year





# Improvements we would like to see this year



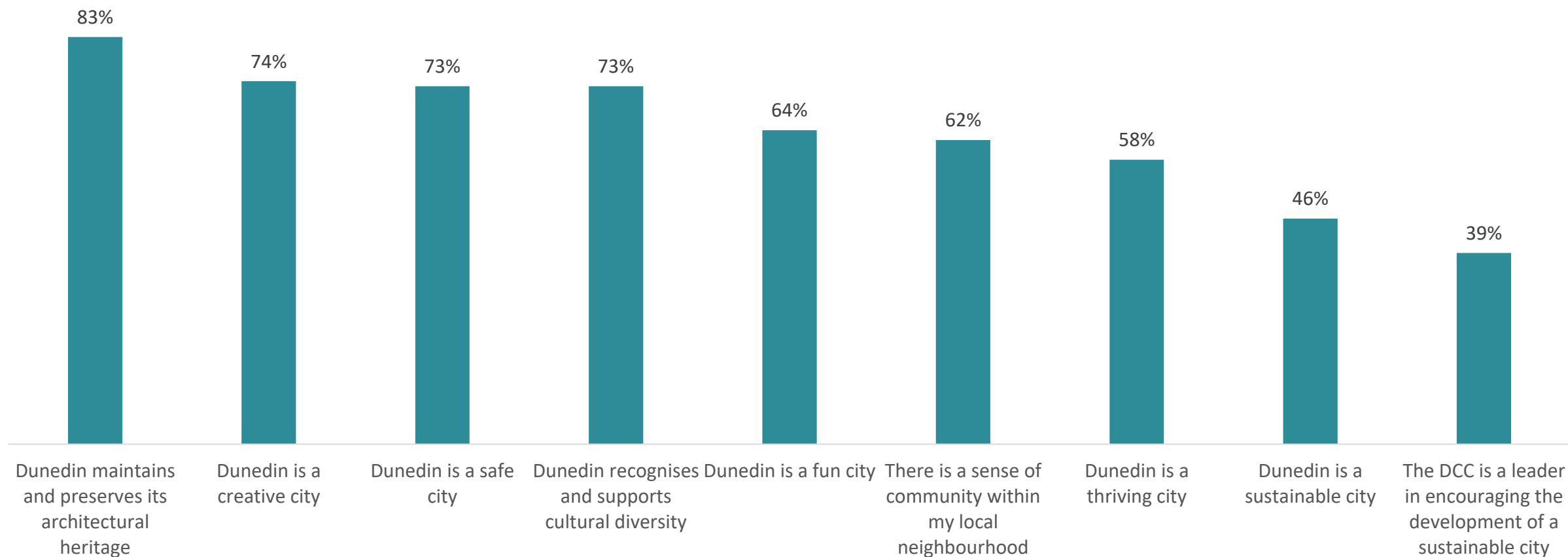


# Perceptions of Dunedin



# Perceptions of the city – 2019/20

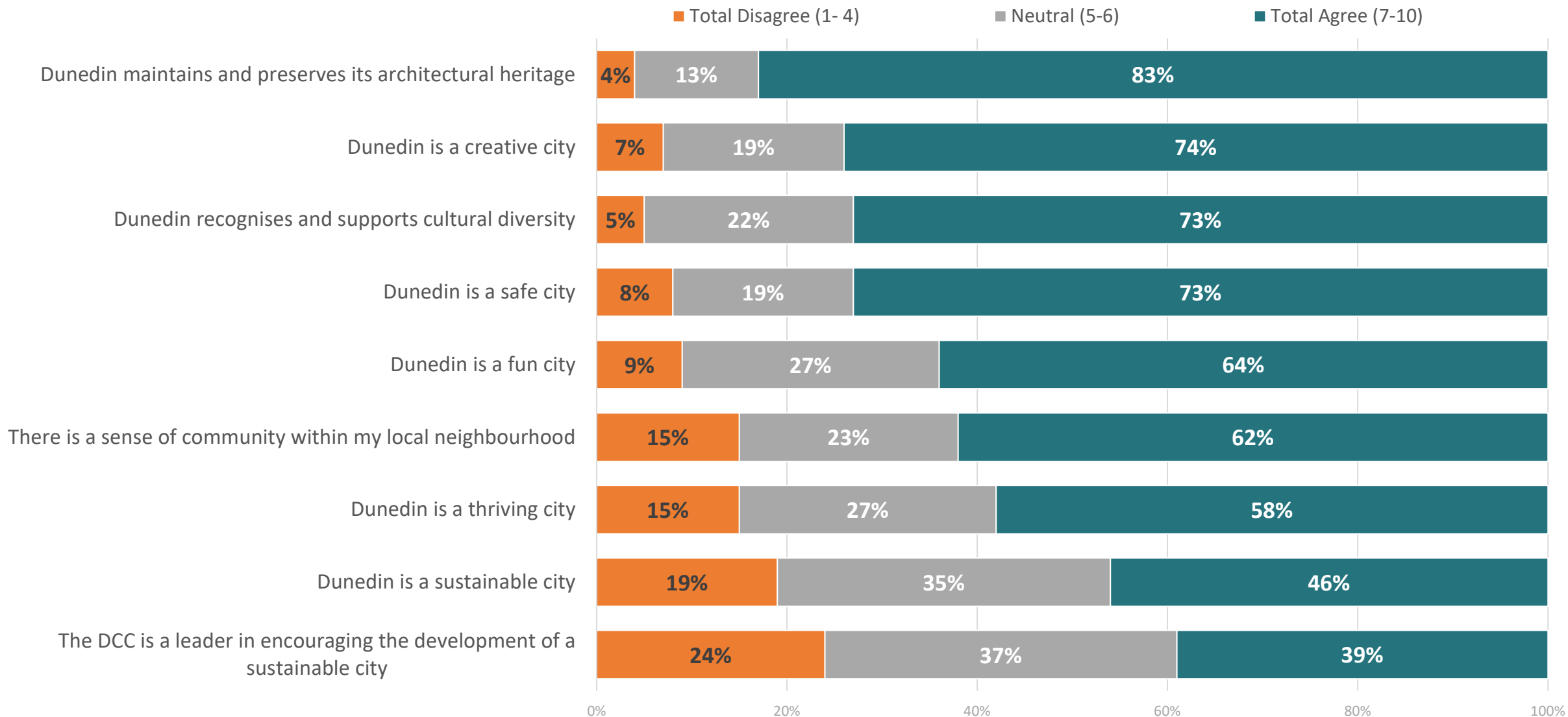
In 2019/20, Dunedin received the highest percentage of positive ratings for maintaining and preserving its architectural heritage. In contrast, ratings are lowest for the DCC being a leader in encouraging the development of a sustainable city and for Dunedin being a sustainable city.







# Perceptions of the city – 2019/20

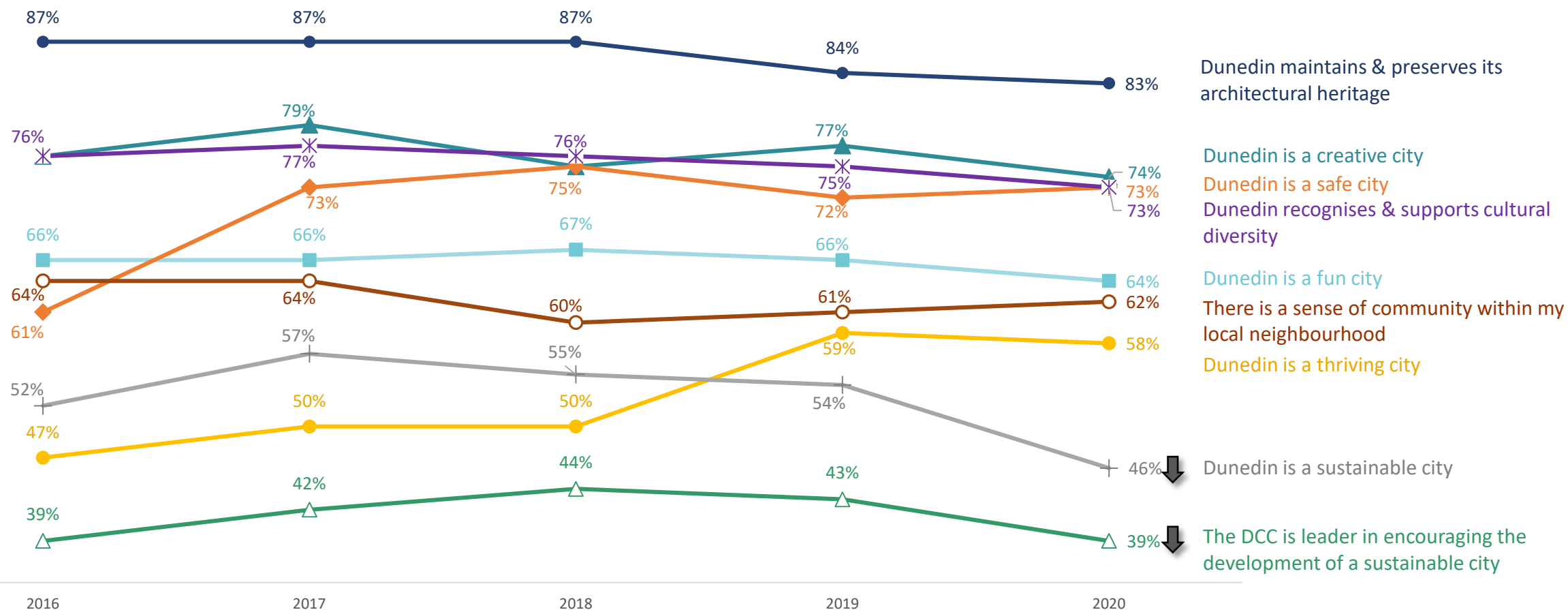




# Perceptions of the city over time

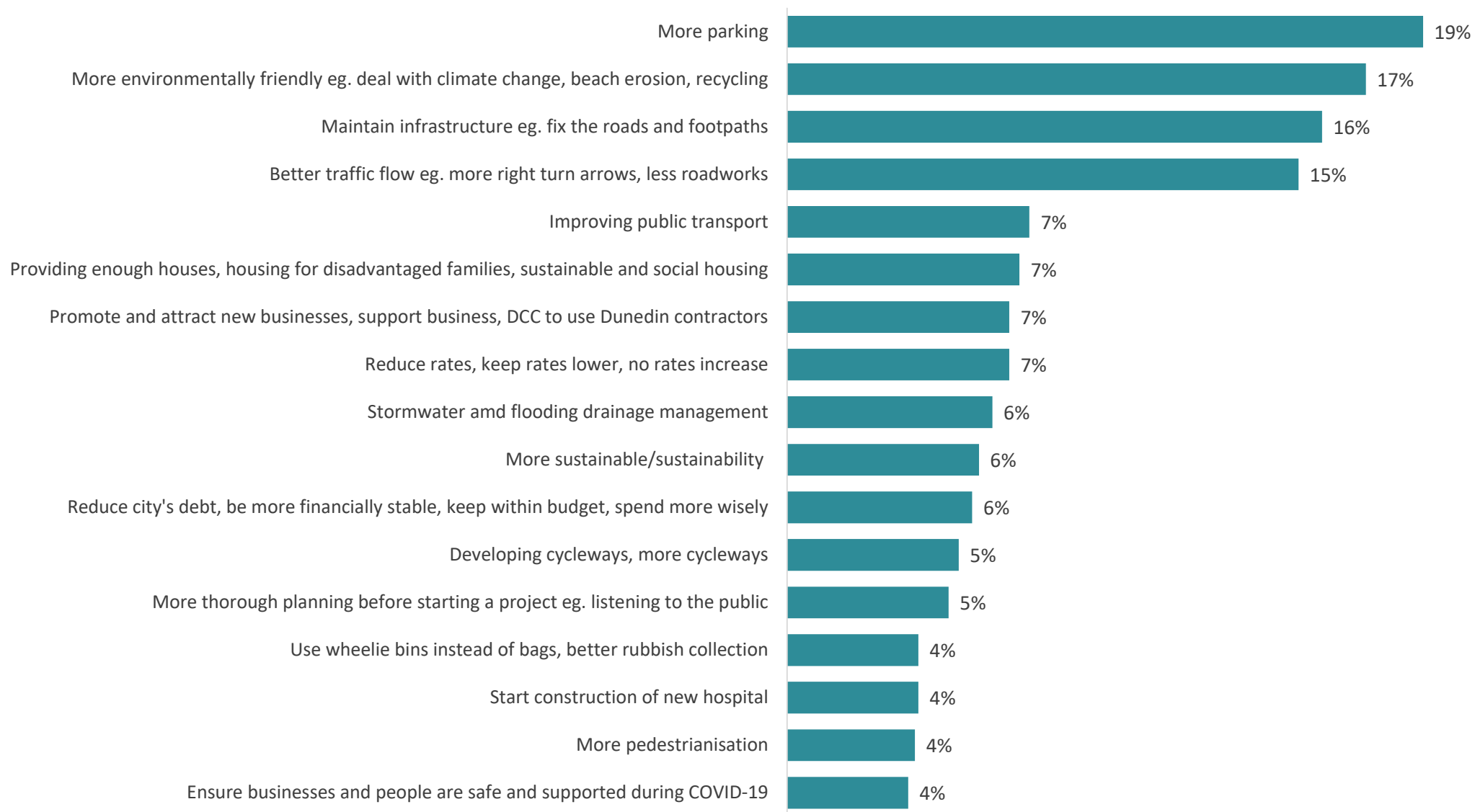
Residents' perceptions around sustainability are less positive this year, with significant declines in the agreement that Dunedin is a sustainable city and that DCC is a leader in encouraging the development of a sustainable city.

All other measures remain stable compared to last year.



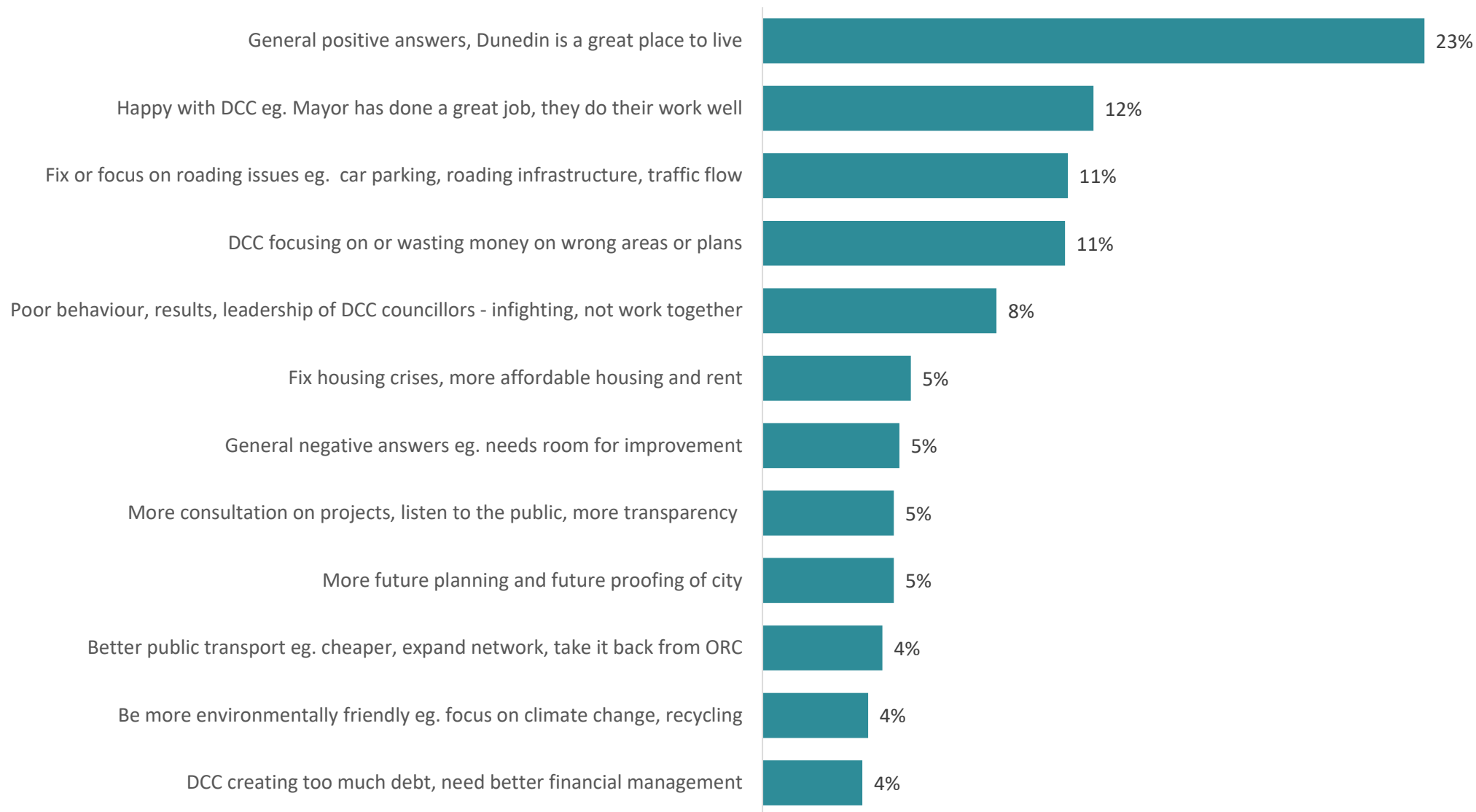


# Top two priorities for DCC this year



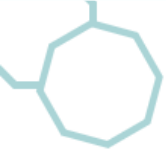


# Any other comments about the DCC or Dunedin city in general





## Performance versus Importance

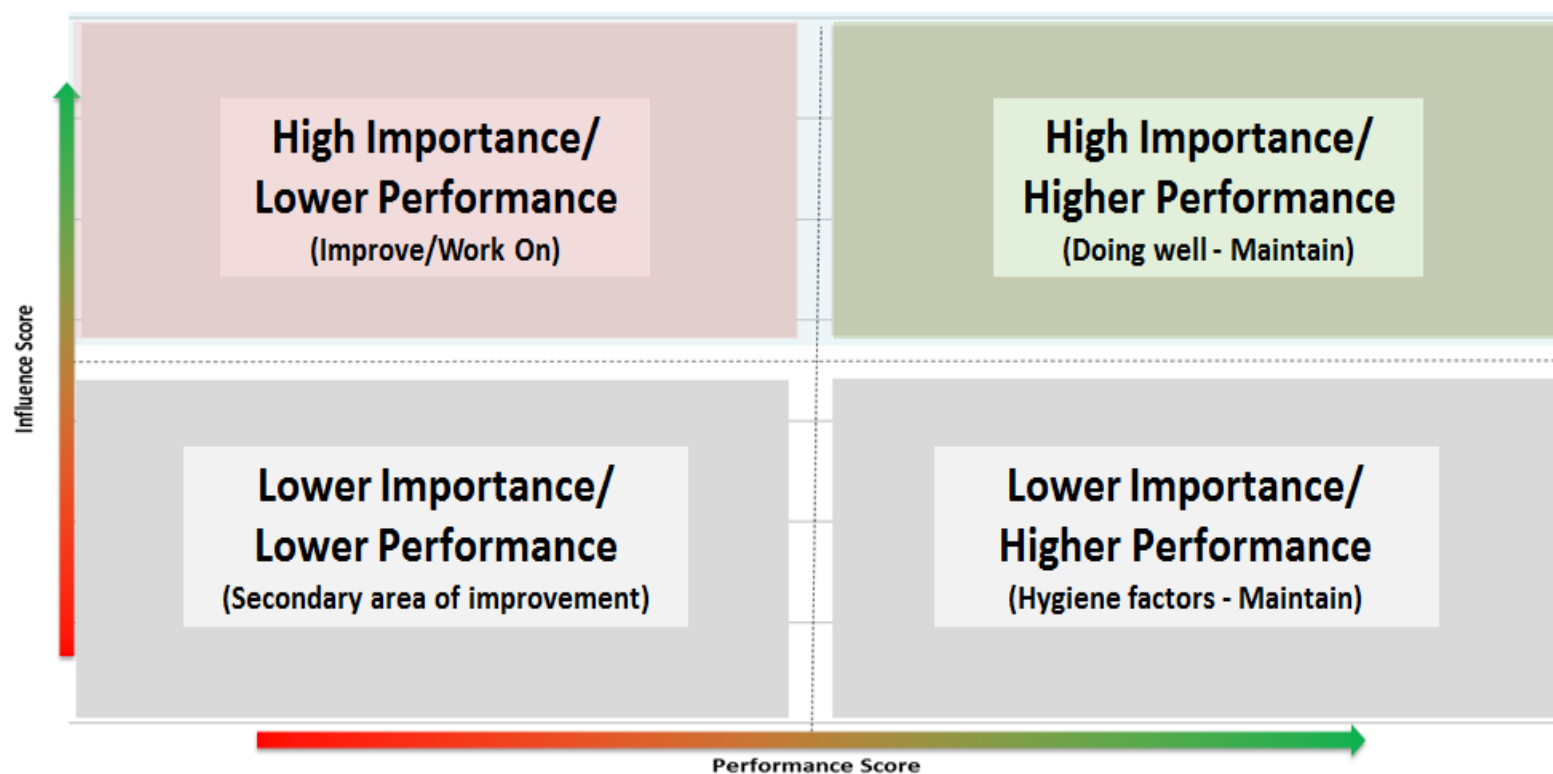


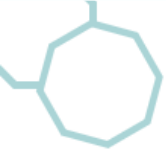
# Attributes influence on overall satisfaction - correlation

To establish the relative importance of each attribute, statistical techniques (correlation analysis) have been applied to the data to establish the relationship of each attribute to the overall satisfaction rating.

*A correlation of less than 0.3 is fairly weak, between 0.3 and 0.5 quite strong, between 0.5 to 0.6 is strong, and above 0.6, the correlation is considered very strong. The maximum correlation score is 1.0, representing perfect correlation.*

Plotting the importance of each individual aspect against its current performance (% giving a rating of 7+) shows areas that are currently doing (relatively) well, areas for improvement and 'hygiene factors' where the level of service needs to be maintained.





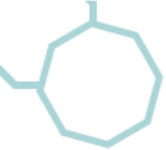
# Overall performance importance correlation

The following figure plots the importance of the overall ratings from each section within the survey against the satisfaction score (% giving a 7+ rating) in the 2019/20 year.

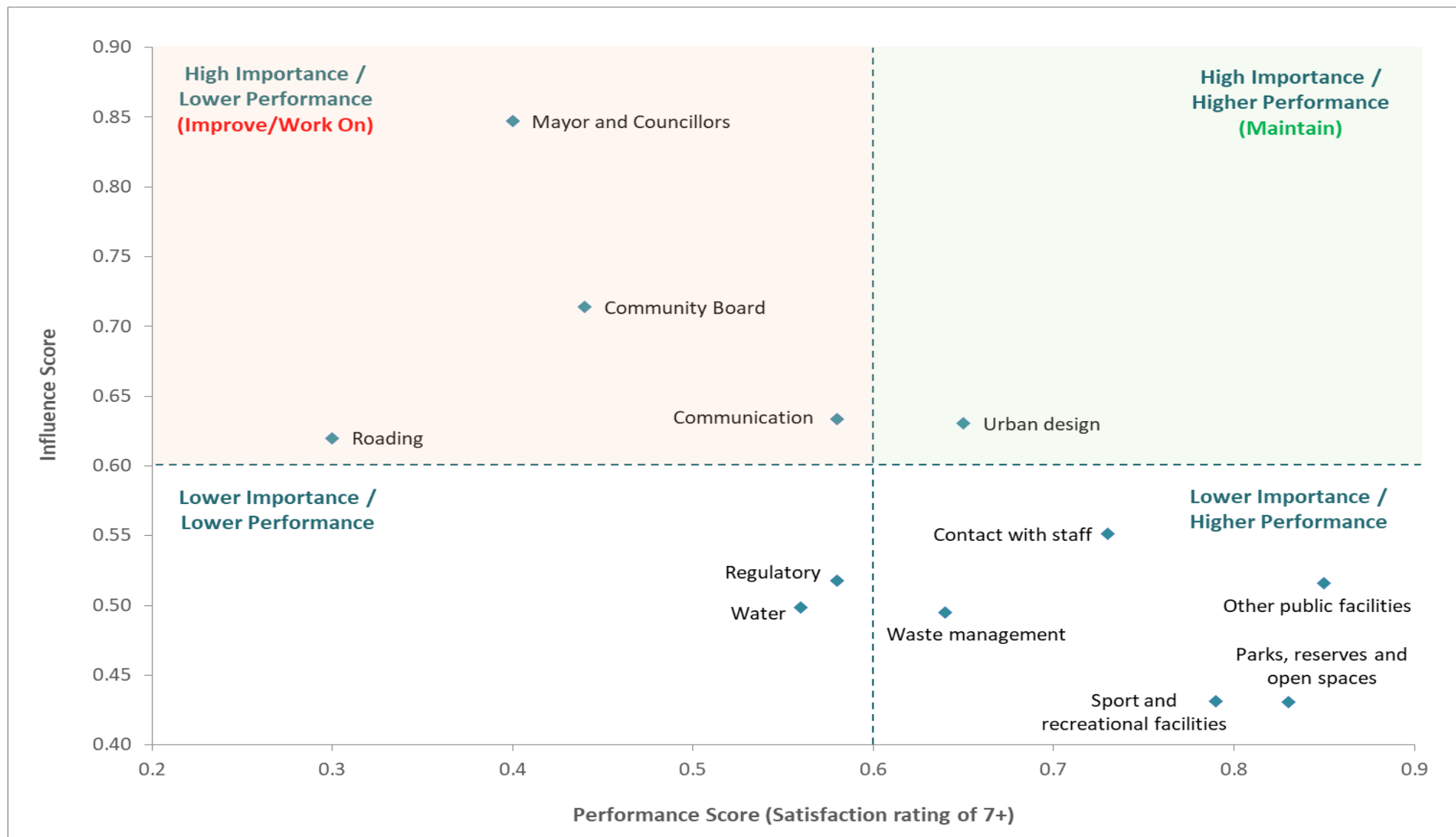
The overall attributes with the highest performance scores are for facilities – including public facilities (85% satisfied), parks, reserves and open spaces (83%) and sport and recreational facilities (79%) – and to a lesser extent contact with staff (73%) planning and urban design (65%) and waste management (64%). These attributes should all be maintained along with particular focus on the attribute that sits in the higher importance category – planning and urban design – to ensure overall ratings remain high.

Four attributes – including the performance of the Mayor and councillors, the performance of the Community Board members, communications and roading related infrastructure – fall in the high importance/lower performance category. Improvements in performance in these areas will have the biggest impact on the improvement of the “overall satisfaction with DCC” score.



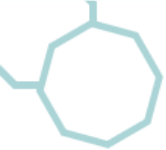


# Overall performance importance correlation



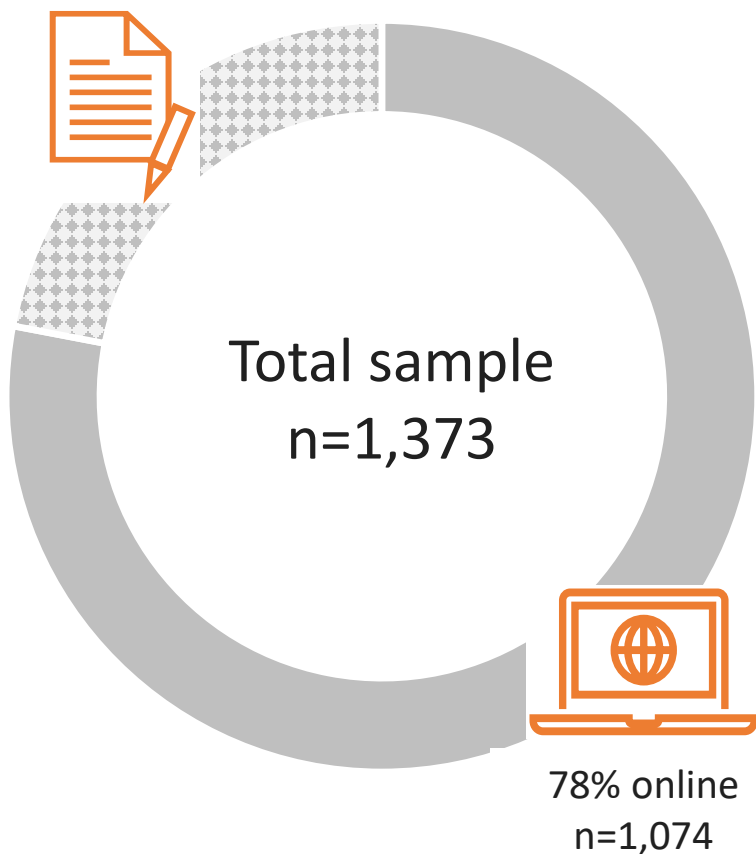


# Sample Profile



# Response rate

22% paper  
n=299



## Responses

A total of n=4,800 invitations (n=400 a month) were sent during July 2019 to June 2020, with total responses of n=1,373. This is a **response rate** of 32%\* (compared with 28% in 2019).

## Margin of error

The results have a maximum margin of error of +/- 2.6% at 95% confidence interval.

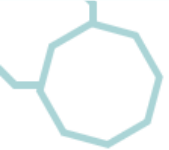
## Data weighting

Post data collection the sample has been weighted to known population distributions based on the census data for age, gender, ethnicity, and location (based on the 11 community areas).

## Data analysis

Responses were cross-tabulated by demographic variables (gender, age group, and ethnicity) and location and where significant differences in response rates exist, these are noted in the text.

Note: Totals may not add to 100% due to rounding.



# Sample profile

Unweighted - based on responses received



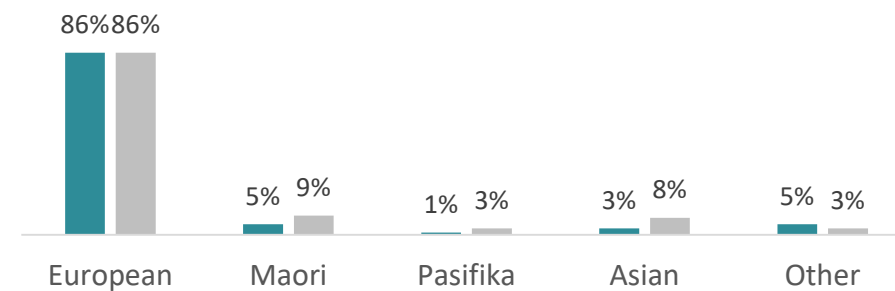
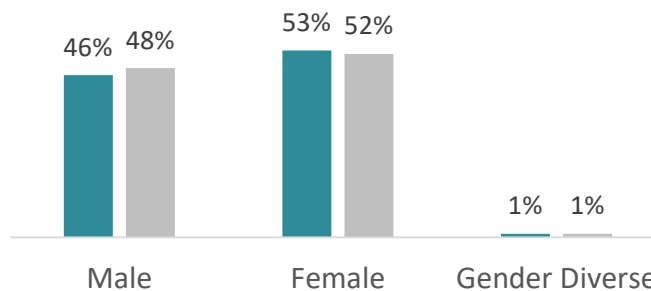
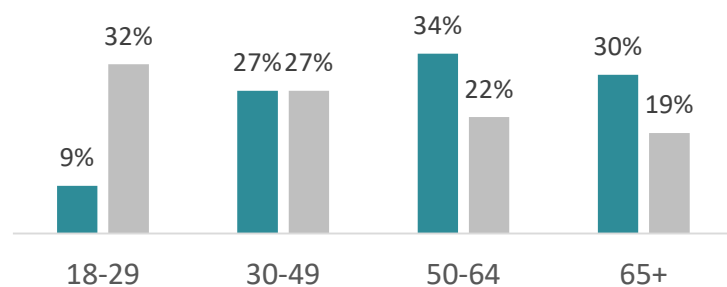
## Age



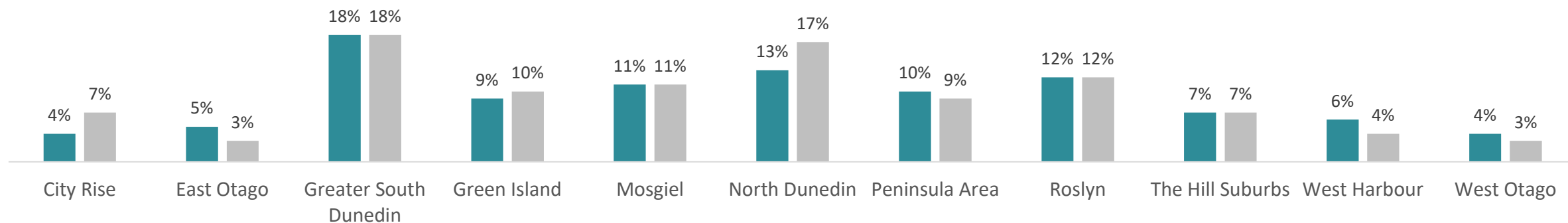
## Gender

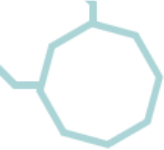


## Ethnicity



## Location (Community Areas)





Age	%	Weighted base	Unweighted base
Under 30	32%	430	274
30 – 49	27%	367	694
50 – 64	22%	299	841
65 or over	19%	256	927

Ethnicity	%	Weighted base	Unweighted base
European	83%	1123	1153
NZ Māori	8%	108	73
Pasifika	2%	27	16
Asian	5%	68	40
Other	2%	27	74

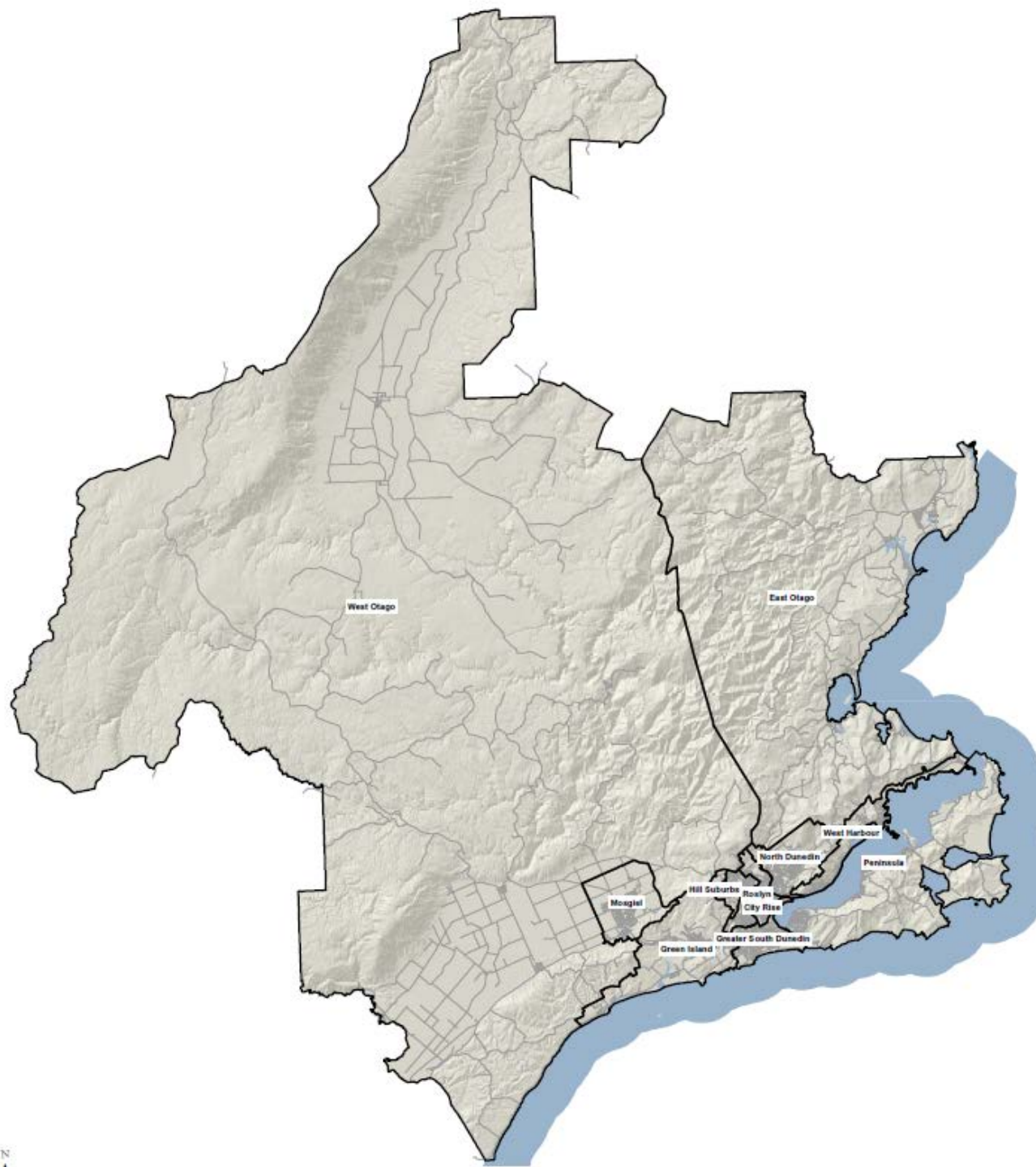
Country of birth	%	Weighted base	Unweighted base
In New Zealand	83%	1125	1099
Overseas	17%	227	263

Employment status	%	Weighted base	Unweighted base
Full-time, paid	50%	673	597
Part-time, paid	20%	276	245
Not in paid employment	13%	170	122
Retired	17%	233	399

Gender	%	Weighted base	Unweighted base
Male	48%	644	599
Female	51%	695	751
Gender diverse	1%	14	13

Property ownership in Dunedin	%	Weighted base	Unweighted base
Yes	65%	875	1086
No	35%	476	276

Commute to work	%	Weighted base	Unweighted base
Drive a car, van or truck with no passengers	51%	487	457
Drive a car, van or truck with passengers	15%	139	129
Walk or jog	11%	103	65
Work from home	7%	66	63
Public bus	5%	45	43
Bicycle	4%	41	31
As a passenger in a car, van, truck	4%	34	24
Other	2%	18	17
Motorbike	1%	6	4



Community Area		%	Weighted base	Unweighted base
A)	City Rise	4%	95	61
B)	East Otago	5%	53	62
C)	Greater South Dunedin	18%	243	246
D)	Green Island	9%	112	121
E)	Mosgiel	11%	140	155
F)	North Dunedin	13%	200	182
G)	Peninsula Area	10%	133	140
H)	Roslyn	12%	164	165
I)	The Hill Suburbs	7%	96	99
J)	West Harbour	6%	64	80
K)	West Otago	4%	53	60