Appendix 1

Community and business recovery survey results

Contents

Overview

The following report provides top line findings from the City of Sydney's community and business Covid-19 recovery survey conducted 18 May to 3 June 2020. Further analysis on qualitative data and different cohorts and segments is ongoing and will inform the implementation of the City's Covid-19 Recovery Plan.

Community survey snapshot

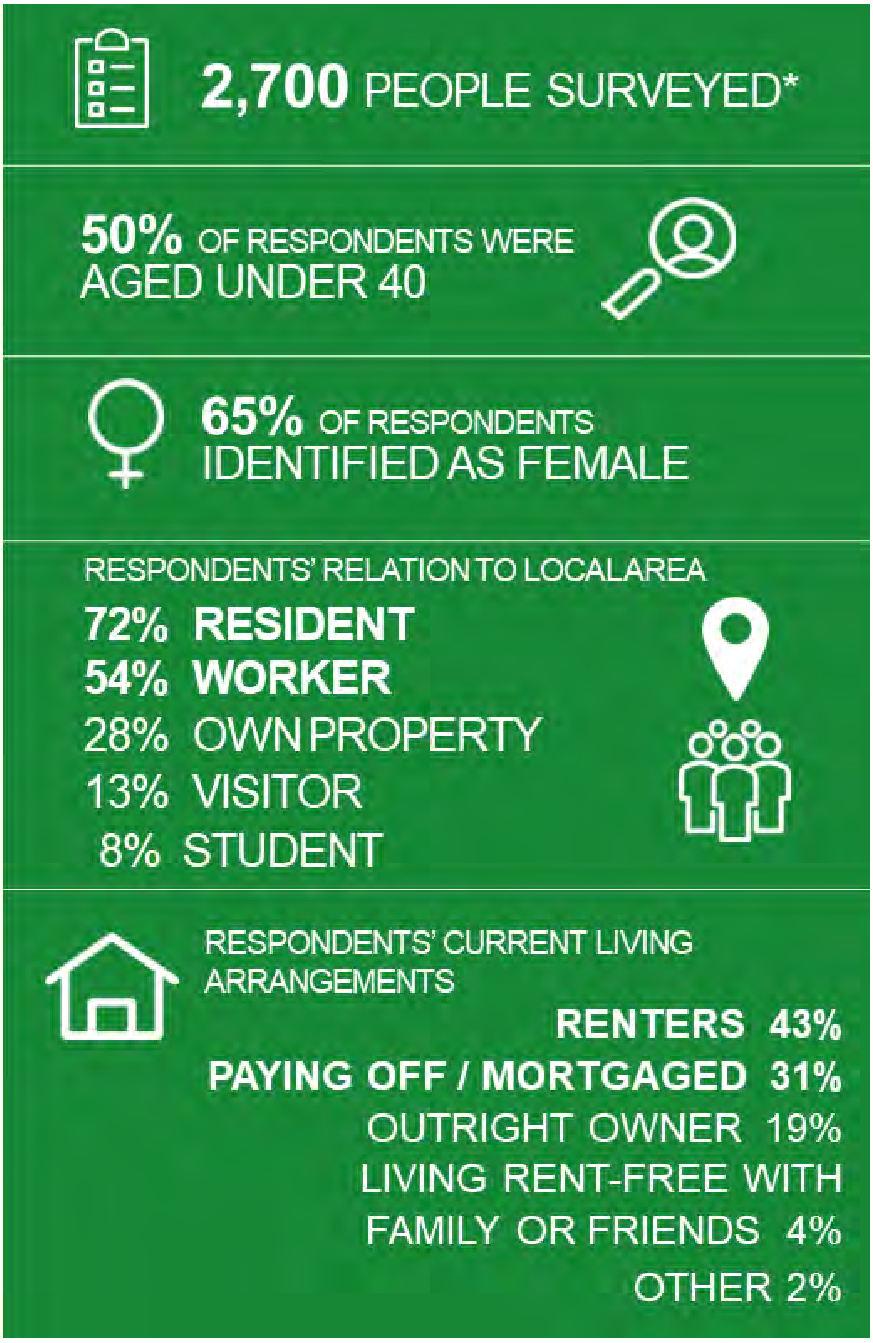

Figure 1 community survey snapshot

**533 respondents who completed the community survey also completed the business survey*

1. Community survey findings

1.1. Covid-19 pandemic impacts

We asked people how the Covid-19 pandemic had affected them (this was a multiple choice question, with the option to add individual responses). A total of 2,762 people responded to this question.

Over half of survey respondents (51%) were affected by being unable to do activities important to them and feeling concerned for people who are important to them.

About third of survey respondents experienced feeling lonely (33%) or having mental health and wellbeing concerns (34%) during the pandemic.

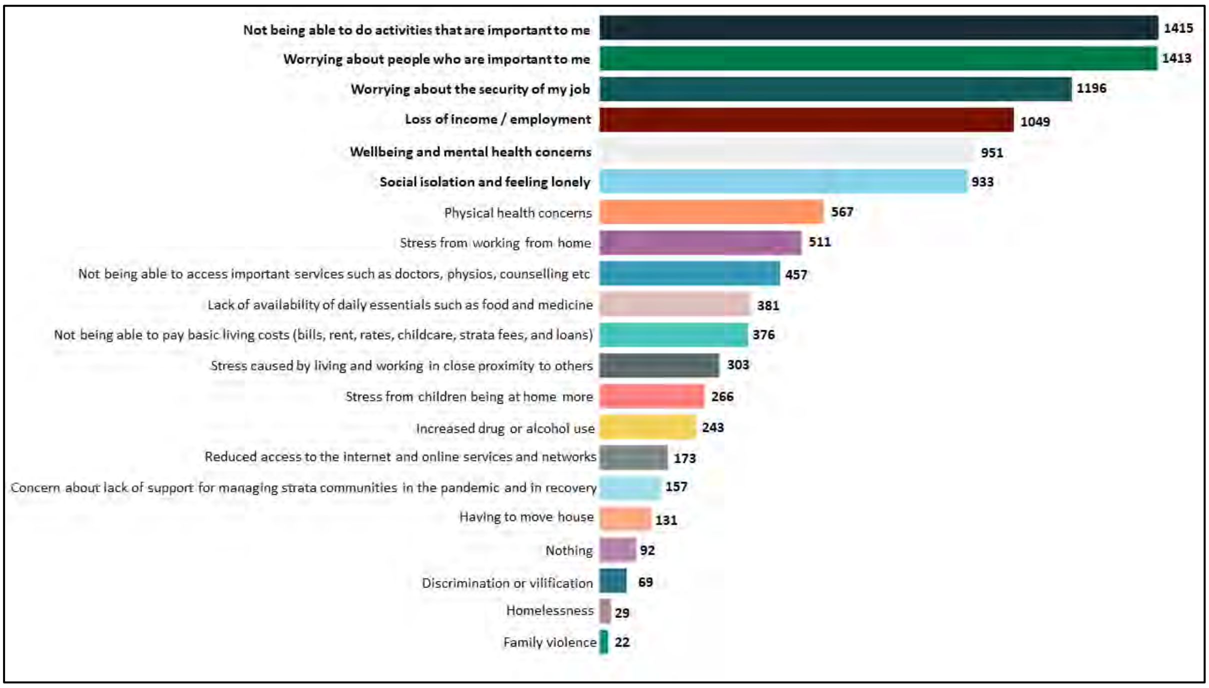

Figure 2: Covid-19 pandemic impacts

1.2. Costs impacted (if applicable)

If respondents indicated they have been unable to pay basic living costs, we asked what type of costs they have not been able to afford. A total of 379 people responded to this question. Over half (53%) of respondents indicated they have not been able to afford rent, followed by bills (50%), mortgage (26%) and other loans (23%).

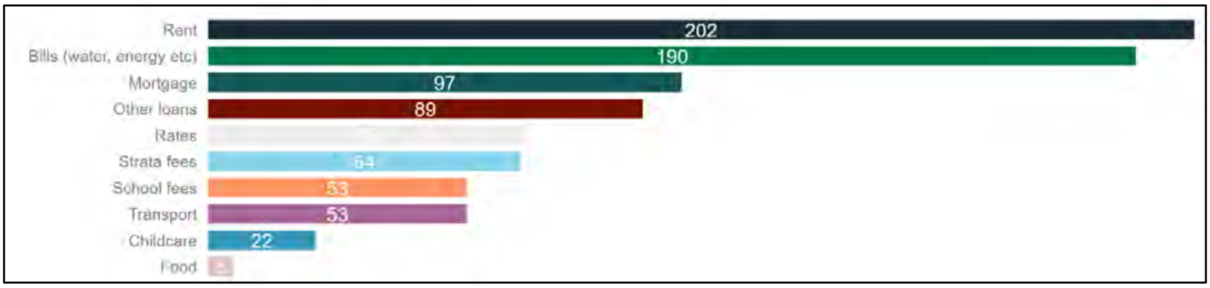

Figure 3: costs impacted (if applicable)

1.3. Activities impacted (if applicable)

If respondents indicated they have been unable to do activities that are important to them, we asked for more information about the type of activities they have been unable to do. A total of 1,420 people responded to this question. Almost 90% of respondents said visiting friends and family was an important activity that they have been unable to do. Not being able to visit local cafes and restaurants has had a high impact on the majority of respondents (84%). Significantly, the next three most important activities that people indicated they have been unable to do are all cultural activities (66% cinemas, 60% art galleries and museums, 59% live performances).

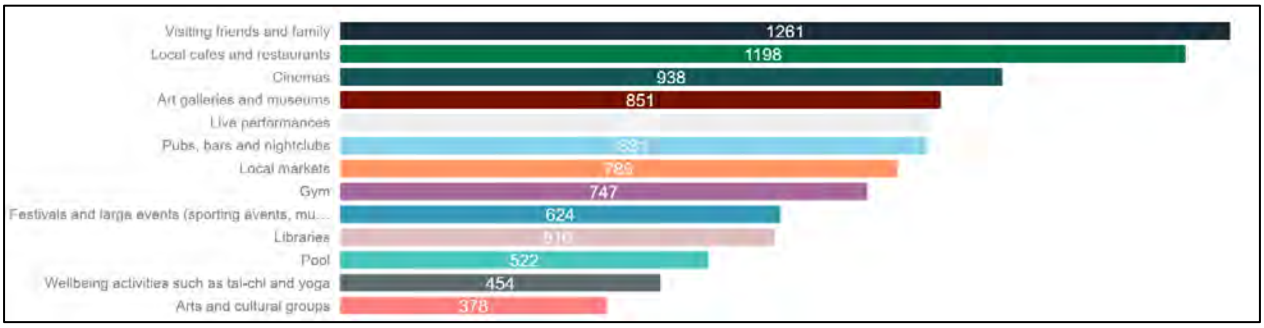

Figure 4: activities impacted (if applicable)

1.4. Positive impacts or experiences

We asked if there were any positive things people had experienced during Covid-19. A total of 2,712 people responded to this question. Over half of respondents (51%) said flexible working arrangements, more time with family (47%), acts of kindness (40%) and 31% have experienced strengthened connections with neighbours and other networks.

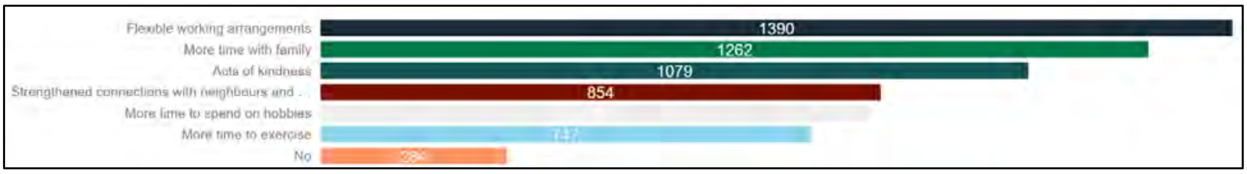

Figure 5: positive impacts or experiences

1.5. Resuming activities in Sydney

We asked how soon people would feel safe to resume different activities once Sydney moves to step 3 restrictions (step 3 allows gatherings of up to 100 people if social distancing measures are in place). A total of 2,526 people responded to this question.

While confidence is increasing – there is still a way to go. 52% of respondents said that they would be comfortable visiting their local main street businesses and 65% said they were ready to use parks and open space more (including playgrounds and fitness equipment), but respondents feel less comfortable visiting the Sydney city centre (35%), using public transport (33%) and going to work in an office (30%).

Over a third of respondents said it would be several months before they would hire an indoor space for a community activity (33%) or participate in indoor cultural and community events (36%).

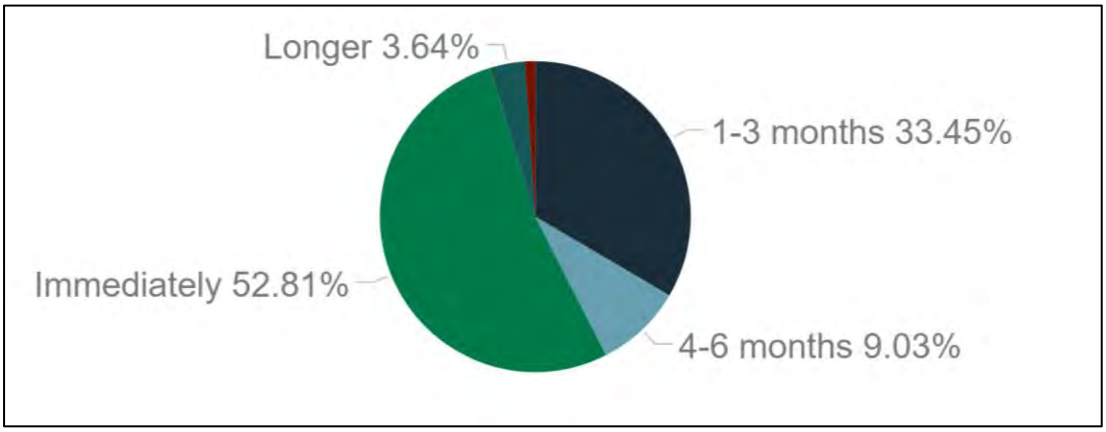

Figure 6: visit my local main street to shop, go to cafes, restaurants and bars

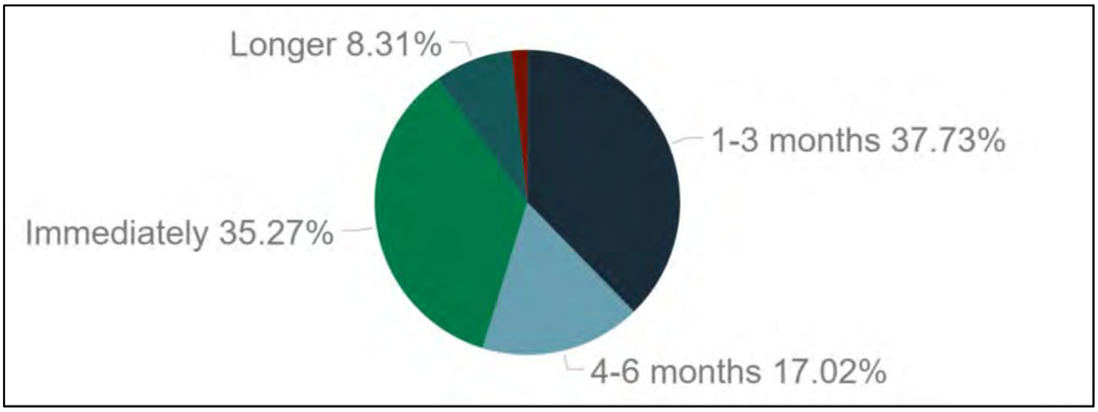

Figure 7: visit the Sydney city centre to shop, go to cafes, restaurants and bars

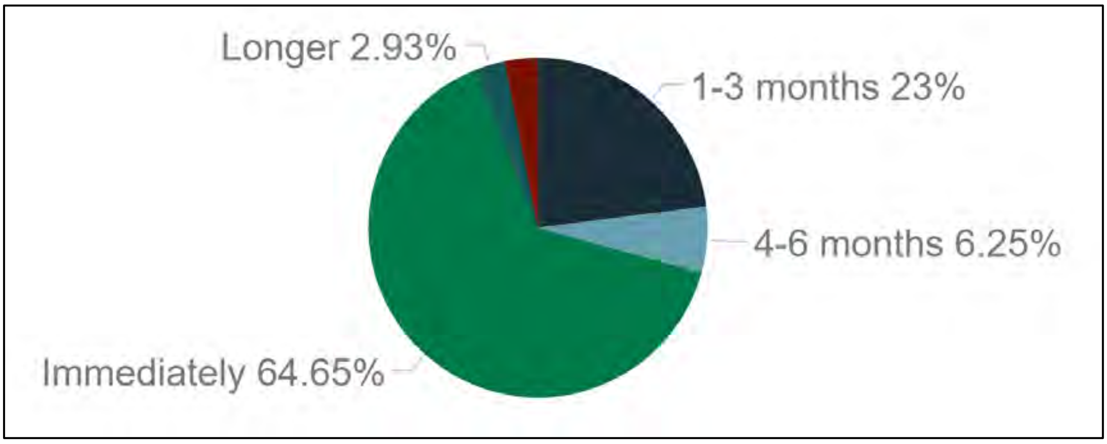

Figure 8: use parks and public spaces more often, for a wider variety of activities (outdoor fitness equipment, boot camps, picnics, playgrounds)

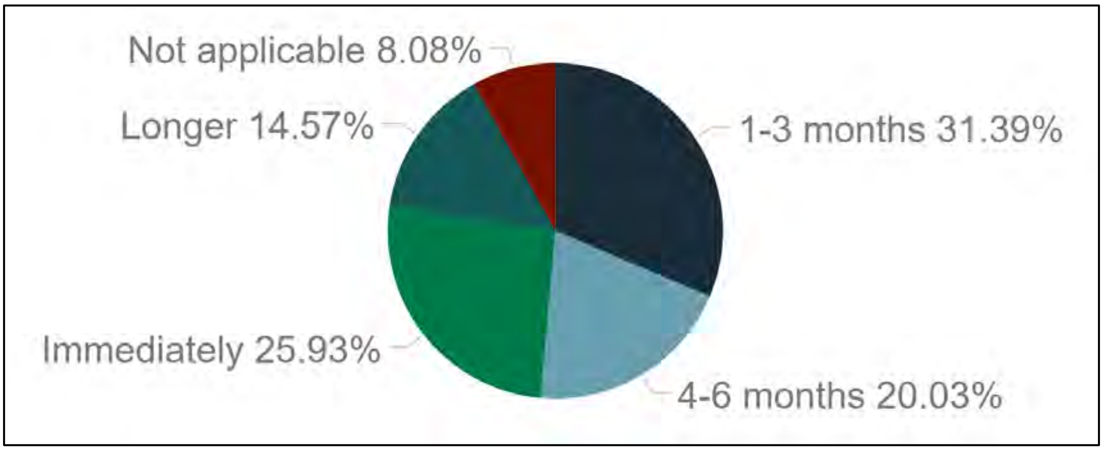

Figure 9: go to indoor locations to exercise (gym, aquatic centre)

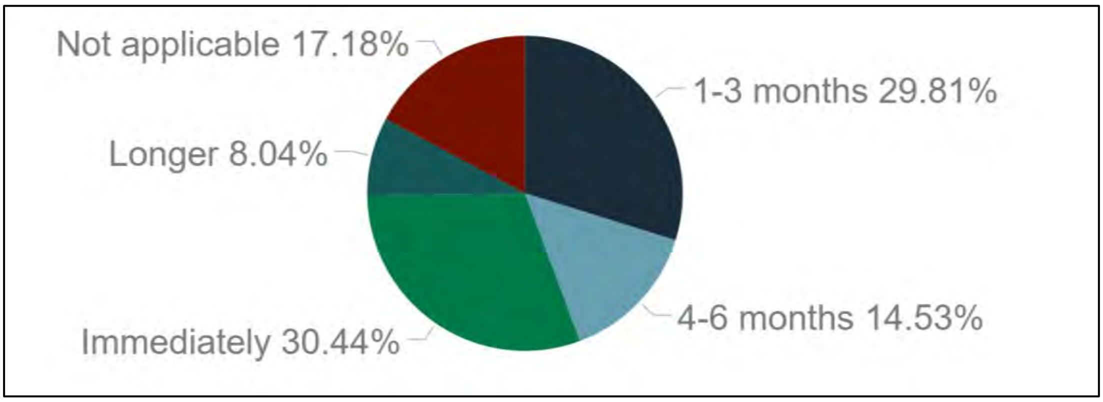

Figure 10: work from an office

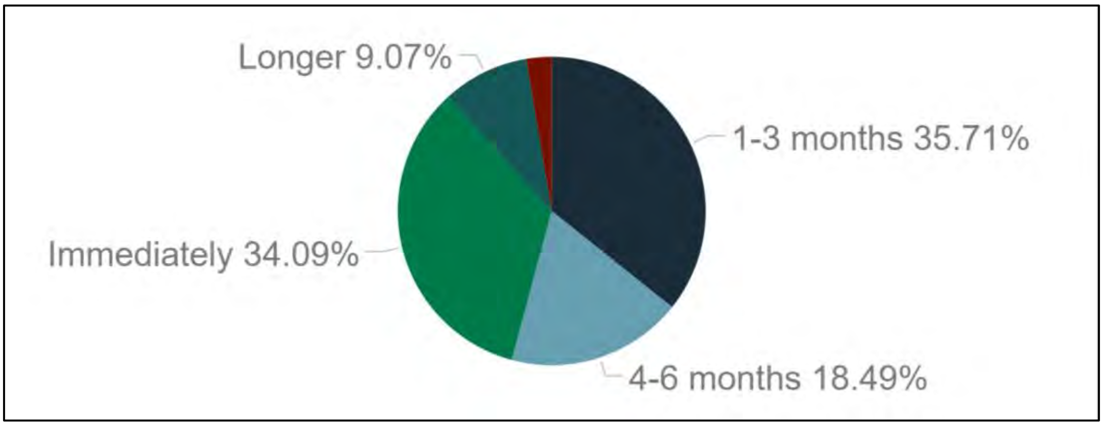

Figure 11: participate in arts, culture and community celebrations (outdoors)

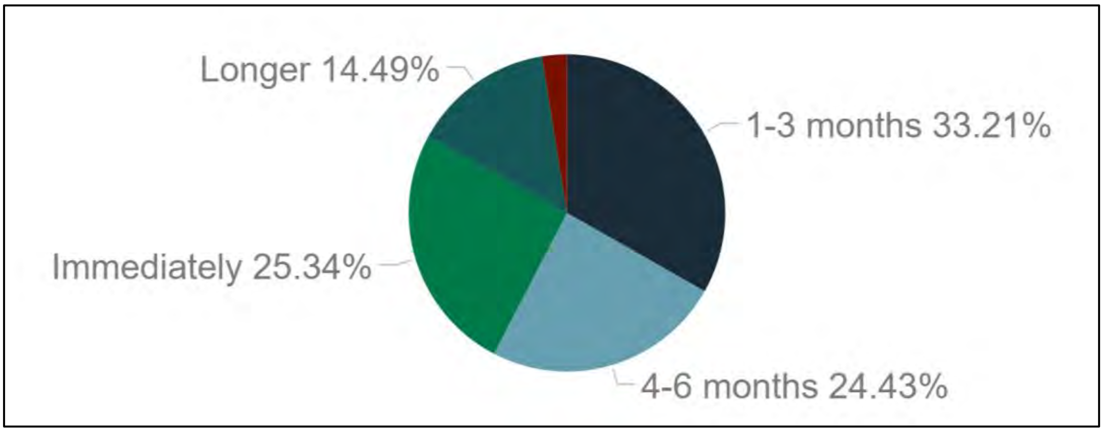

Figure 12: participate in arts, culture and community celebrations (indoors)

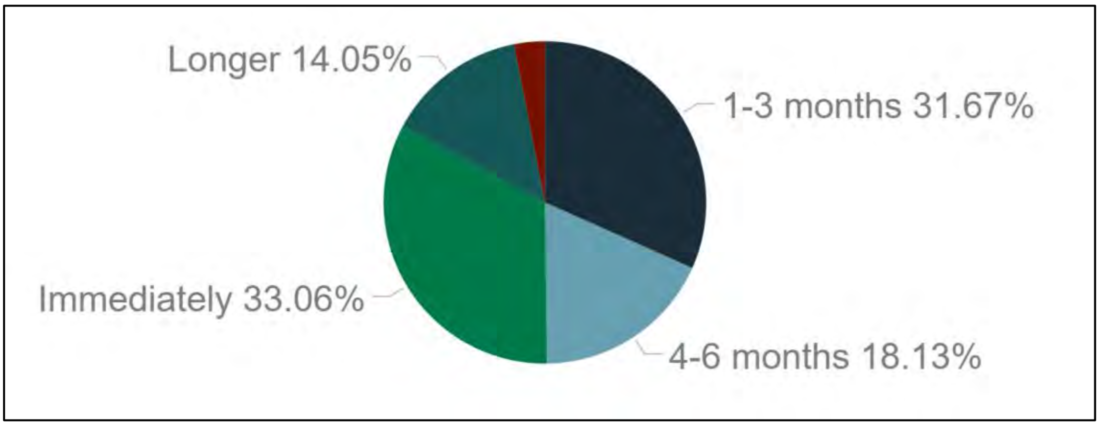

Figure 13: use public transport

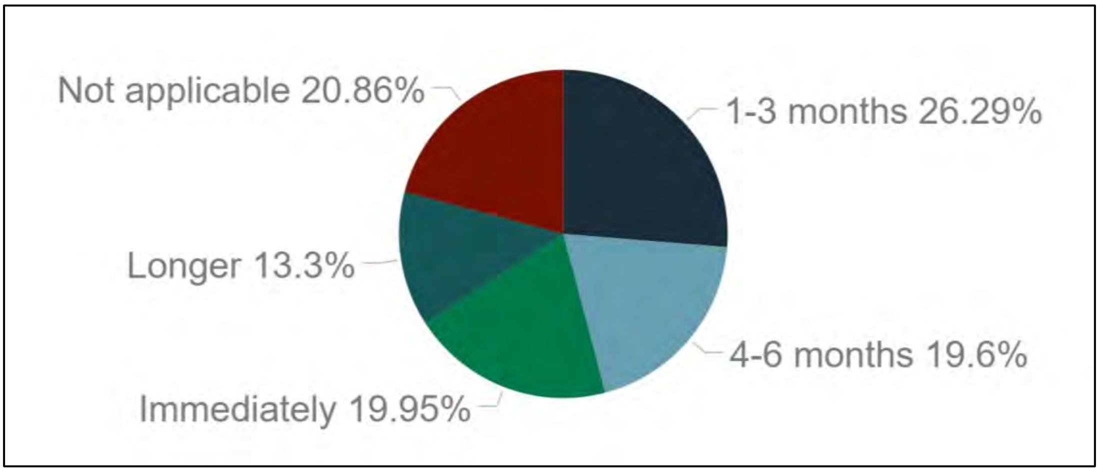

Figure 14: hire an indoor space for a community event (birthday party, book club)

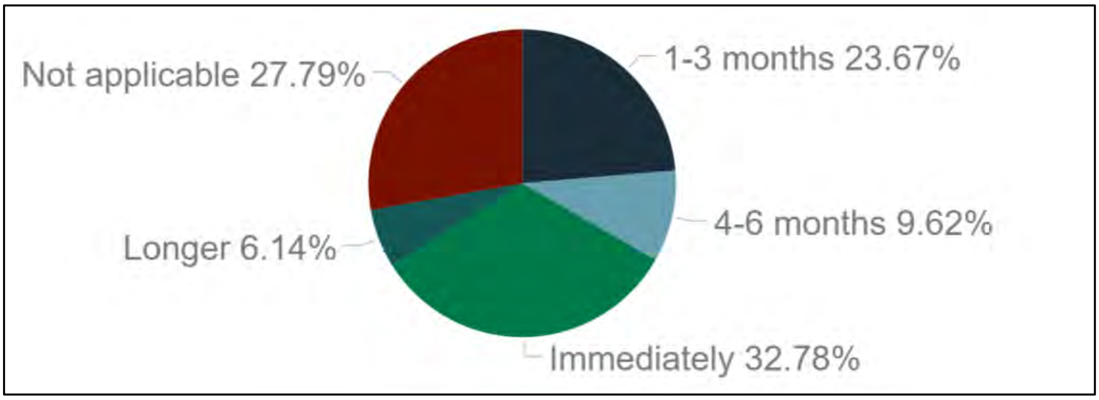

Figure 15: access common areas and shared facilities in apartment buildings

1.6. City of Sydney support

We asked how the City can support communities during recovery. A total of 2,433 people responded to this question. Below is the percentage of respondents who think it is **very important** that the City:

74%	support vulnerable people
68%	clear communications on changes to services and social distancing requirements
62%	support local businesses
59%	lead public health adaptions / assist community to do the same
57%	advocate to state and federal governments for better services (such as health and housing)
56%	support the arts and cultural sector
31%	open facilities, such as libraries, pools and community centres
29%	make it easier for business to get approvals

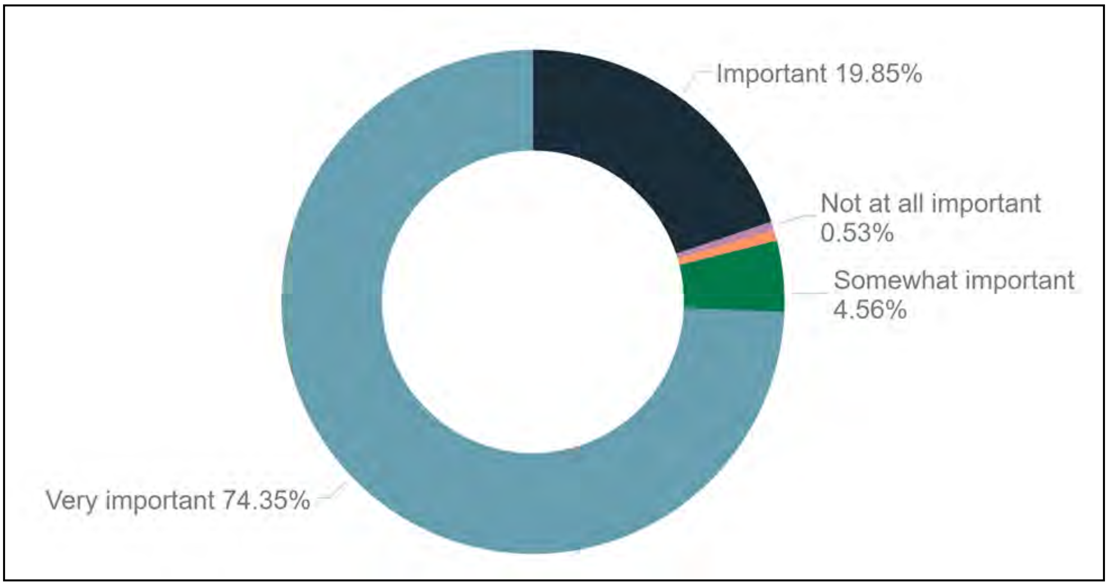

Figure 16: supporting vulnerable people

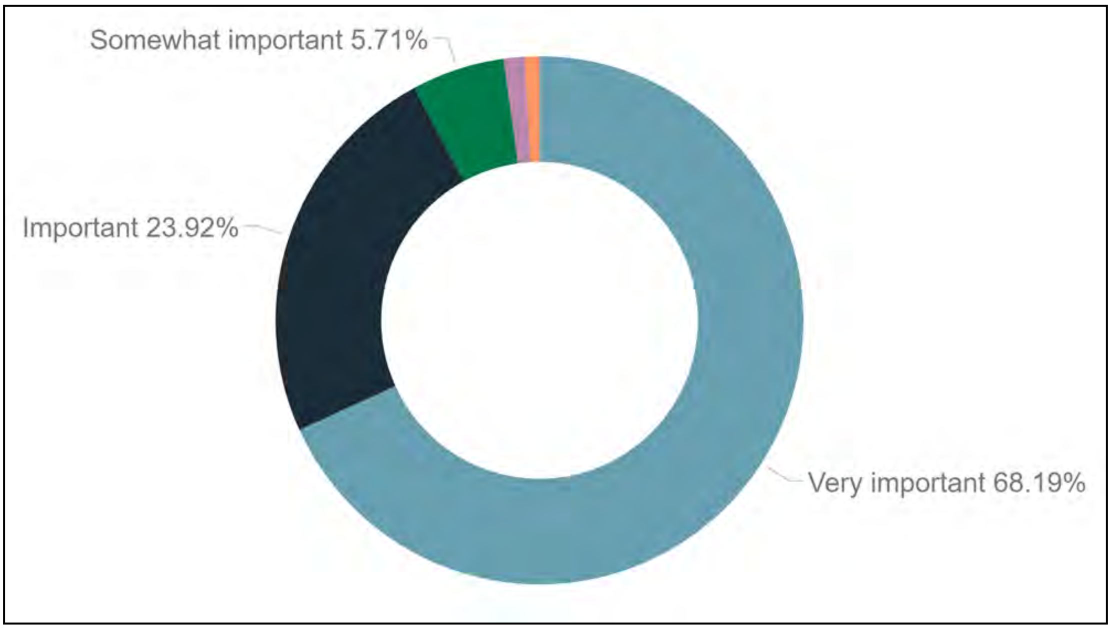

Figure 17: clear communication on changes to services and social distancing requirements

Appendix 1: community and business survey results

City support (continued)…

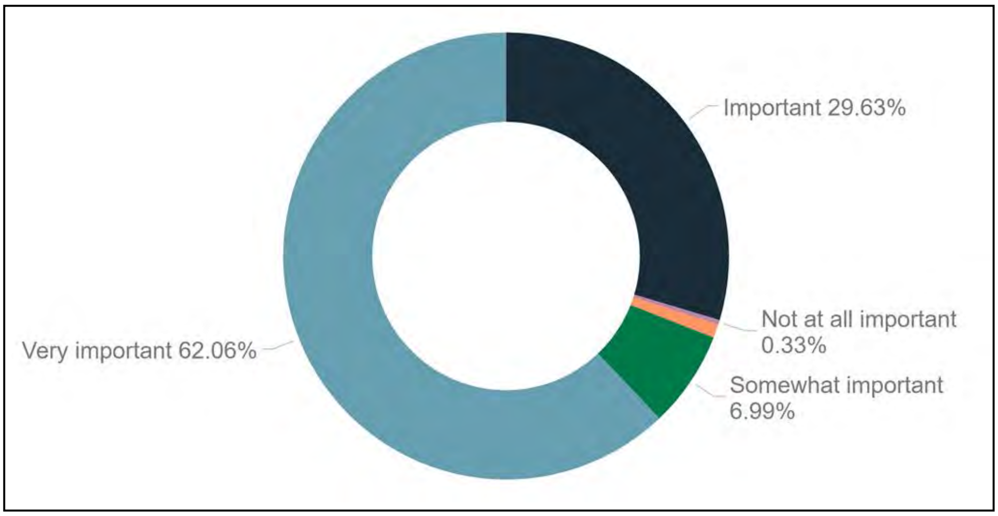

Figure 18: supporting local businesses

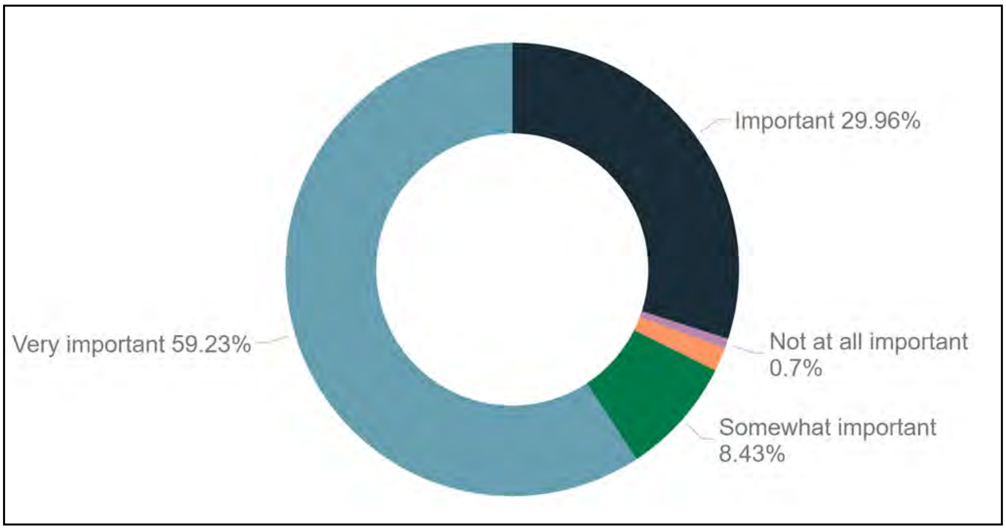

Figure 19: leading effective public health adaptations (social distancing, sanitisers etc) and supporting businesses and community groups to do the same

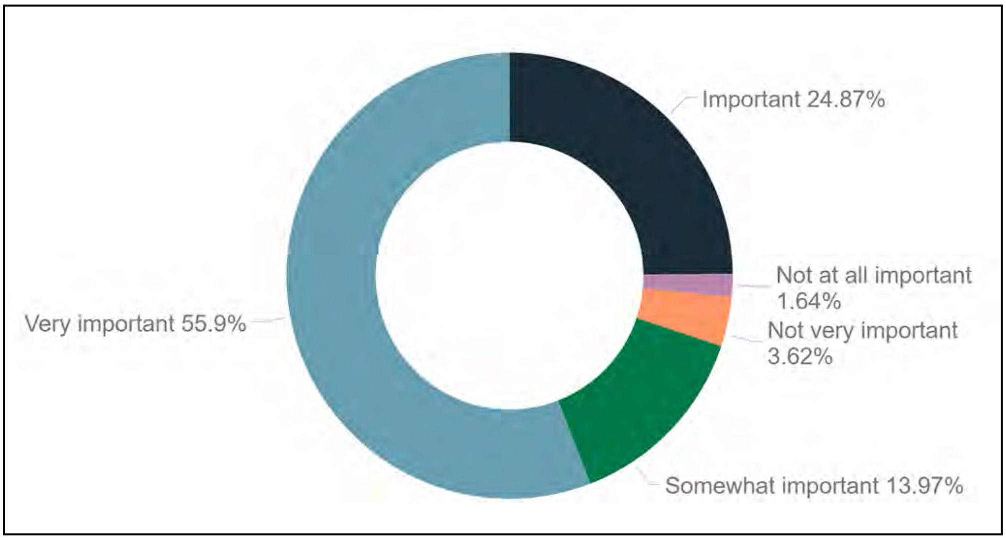

Figure 20: supporting the arts and cultural sector

1.7. Concerns for Sydney's future

We asked people about their greatest concerns for Sydney's future in March 2019 and again in May 2020. A total of 2,434 people responded to this question in May 2020.

Top concerns remain traffic congestion and inadequate public transport, lack of affordable housing and loss of places for entertainment and cultural expression.

Importantly, impacts of climate change and not being prepared for major emergency events in Sydney have moved up the list in comparison to the same question asked about a year ago. Impacts of climate change is now selected second most often (of great concern to 58% or respondents) and perceived lack of emergency readiness now appears in the top ten concerns (40%).

Housing affordability continues to be one of the top 3 concerns people hold for the future of Sydney, with 57% of respondents identifying it as an area of great concern for the future of Sydney.

	March 2019		May 2020
1	Traffic congestion and inadequate public transport	1	Traffic congestion and inadequate public transport (64%)
2	Lack of affordable housing	2	Impacts of climate change including heatwaves and storms (58%) **- shifted up within top 10**
3	Loss of places for entertainment, going out and cultural expression	3	Lack of affordable housing (57%)
4	Lack of parks, trees, green and recreation spaces	4	Loss of places for entertainment, going out and cultural expression (47%)
5	Impacts of climate change including heatwaves and storms	5	Loss of local character and heritage (46%) **- shifted up within top 10**
6	Loss of local character and heritage	6	Loss of local businesses and services (46%) **- new concern added to survey due to Covid-19**
7	Lack of transparency in government	7	Lack of parks, trees, green and recreation spaces (43%)
8	Social disconnection and the loss of community	8	Financial hardship and unemployment (40%) **- new concern added to survey due to Covid-19**
9	Increasing intolerance and social exclusion	9	Not being prepared for a major emergency event in Sydney (40%) **- new to top 10**
10	Too much population growth and development	10	Lack of transparency in government (40%)

Areas of concern in May 2020 outside of the top 10 include:

- Social disconnection and the loss of community (39%)
- Increasing intolerance and social exclusion (36%)
- Too much population growth and development (36%)
- Lack of adequate digital infrastructure (such as 5G network, fibre access, wifi) (28%)
- Surveillance and loss of privacy (22%)
- Increased risks to security and public safety (21%)

Business survey snapshot

1,100 BUSINESSES / ORGANISATIONS SURVEYED*

BUSINESS / ORGANISATION TYPE

55% INCORPORATED FOR PROFIT
22% SOLE TRADER
13% INCORPORATED NOT-FOR-PROFIT
6% OTHER
2% INDIVIDUAL

INDUSTRY SECTOR

18% PROFESSIONAL AND BUSINESS SERVICES
18% CREATIVE INDUSTRIES
14% FOOD AND DRINK
11% TOURIST, CULTURAL AND LEISURE
11% RETAIL AND PERSONAL SERVICES
4% ICT

2% OF RESPONDENTS IDENTIFIED AS ABORIGINAL AND/OR TORRES STRAIT ISLANDER ENTERPRISES

Figure 21: business survey snapshot

*533 respondents who completed the business survey also completed the community survey

2. Business survey findings

2.1 Employment size

We compared businesses / organisations' employment size to responses received from the 2017 Floor Space and Employment Survey (FES2017). A total of 1,049 people responded to this question.

Proportions of businesses by employment size:

- 38.6% were very small (1-4 workers)
- 41.2% were small (5-19 workers)
- 17.3% were medium (20-199 workers)
- 3.0% were large (200+ workers)

These proportions align with the results from the 2017 Floor Space and Employment Survey (FES2017), demonstrating the survey achieved a good representative cross-section of businesses operating at different scales.

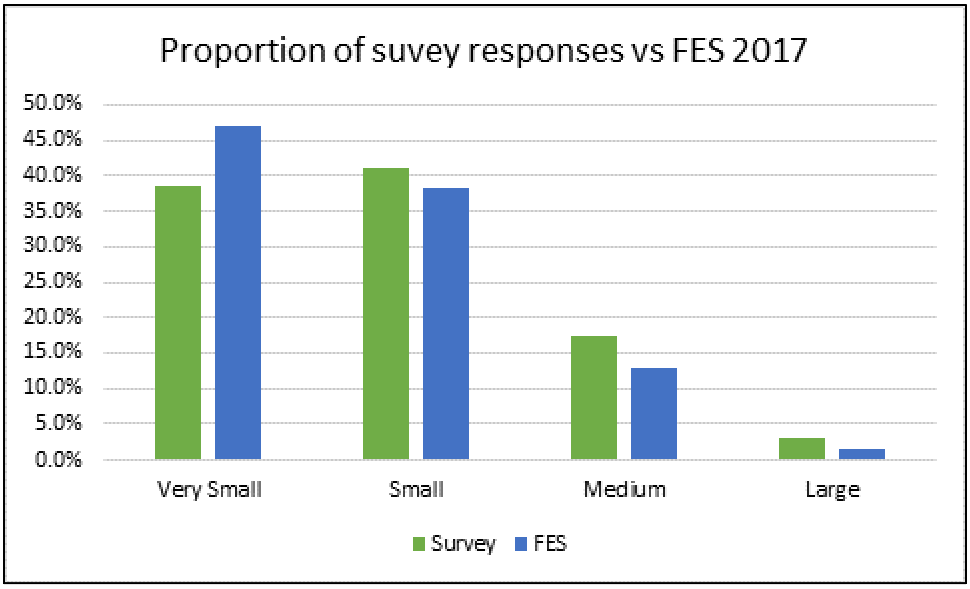

Figure 22: proportion of survey responses vs FES 2017 (employment size)

2.2 Industry sector

We compared respondents' industry sector to responses received from the 2017 Floor Space and Employment Survey (FES2017). A total of 1,194 people responded to this question.

Proportions of businesses by city-based industry sector (top six sectors):

- Creative industries – 17.5%
- Food and drink – 14.2%
- ICT – 4.0%
- Professional and business services – 17.6%
- Retail and personal services – 10.9%
- Tourist, cultural and leisure – 11.1%

The proportions of responses is similar to the proportions of all businesses from the 2017 Floor Space and Employment Survey (FES 2017), except for twice as many responses from the creative industries sector, nearly twice as many from tourist, cultural and leisure sector, and proportionally less retail and personal services sector responses.

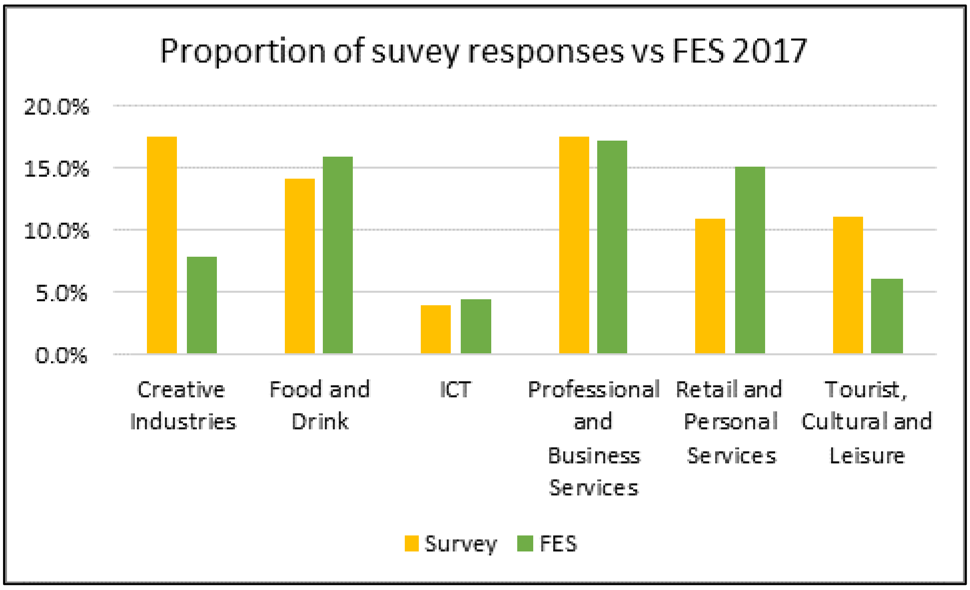

Figure 23: proportion of survey responses vs FES 2017 (industry sector)

2.3 Impacts on employment numbers

We asked people whether their employment levels have been affected by Covid-19. Of 1,128 respondents who answered this question, 42% said they have let staff go and 35% said they have reduced staff hours, but not let staff go.

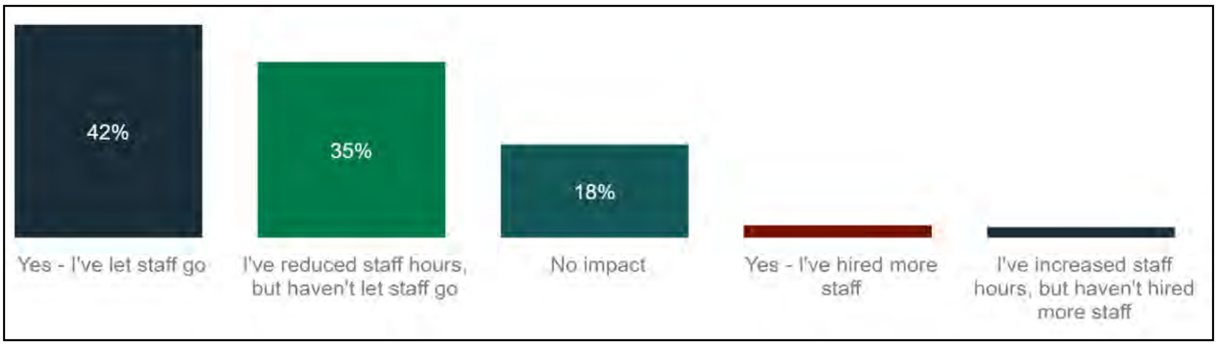

Figure 24: employment levels impacted

2.4 Top 3 impacts

We offered a range of typical business impacts and asked respondents about the level of impact of each. A total of 1,013 people responded to this question. The highest impacts were reduction in turnover/cashflow (69%), reduction in demand for some or all products/services (64%), and government restrictions on operations (59%).

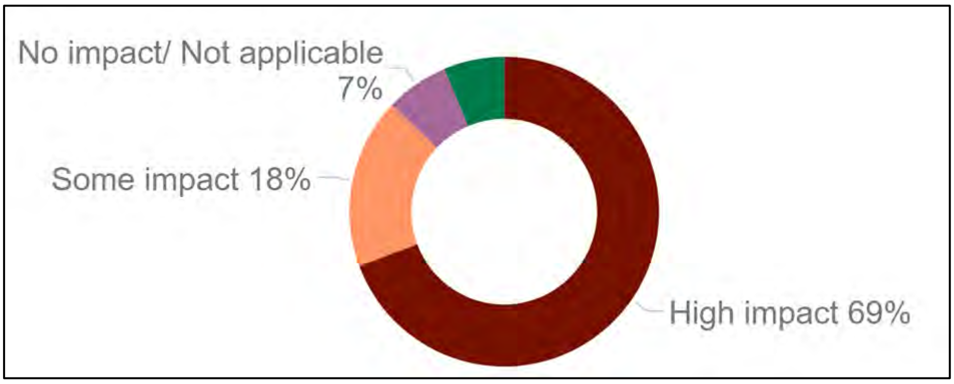

Figure 25: reduction in turnover / cashflow

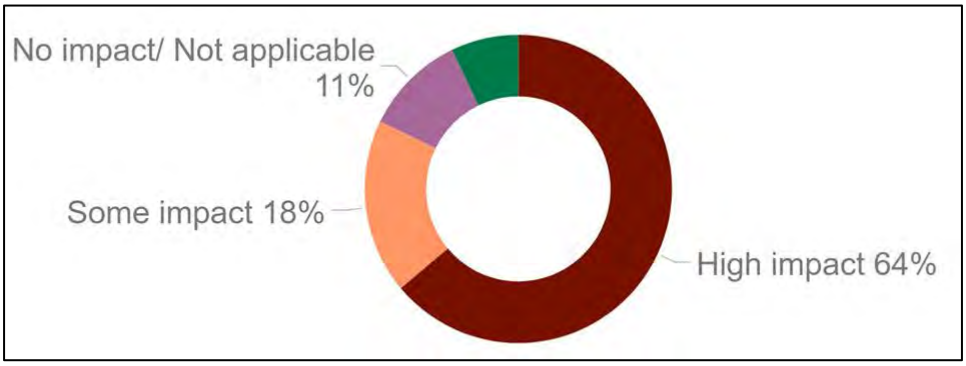

Figure 26: reduction in demand for some or all products / services

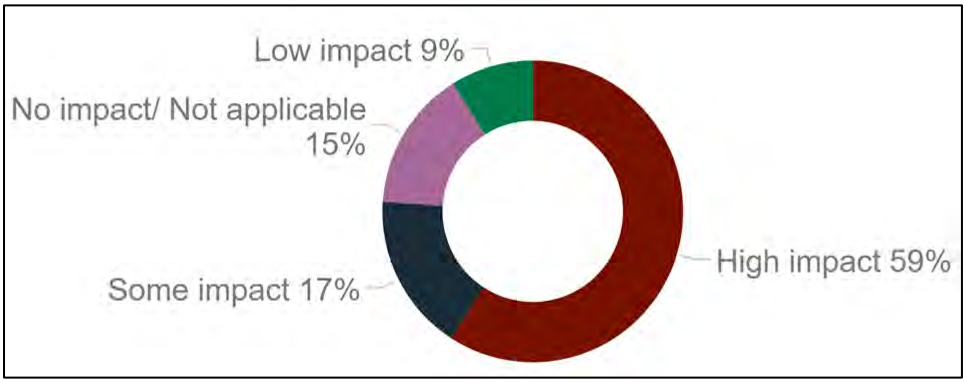

Figure 27: government restrictions on operations

2.5 Business operation and reasons for closures

We asked people whether their business / organisation is still operating. A total of 979 people responded to this question. Most respondents (62%) are still operating, but in a limited or changed way, 20% of respondents said they had temporarily closed, 17% are operating at full capacity and 1% of respondents have permanently closed.

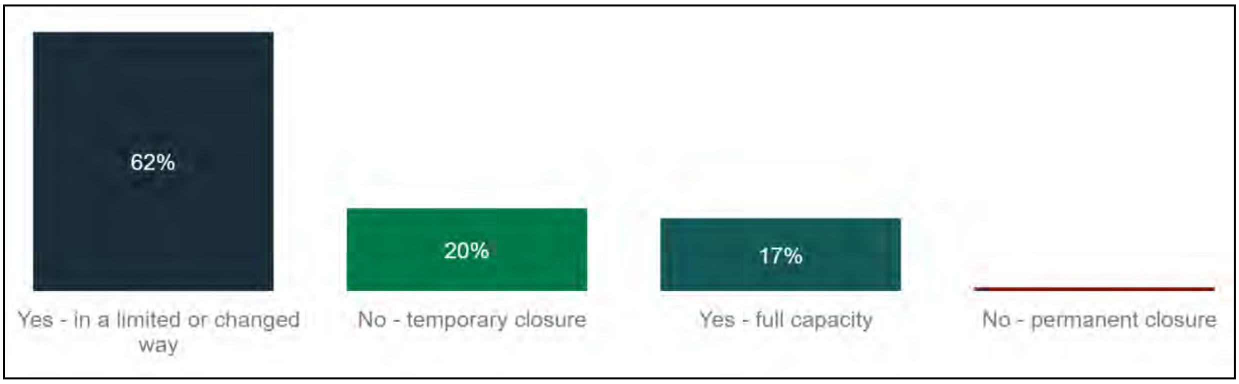

Figure 28: businesses / organisations current operational levels

If respondents indicated they have closed (either temporarily or permanently), we asked what the main reasons are for their closure. Respondents were able to select all that apply and were given the option to provide individual responses. A total of 206 people responded to this question. Most respondents indicated government restrictions as one of the reasons for closure (81%).

81%	**government restrictions**
46%	**loss of revenue**
45%	**lack of demand for product / service**
38%	forced closure
36%	health and safety risks
17%	trouble negotiating rent relief
13%	inability to meet other fixed costs
9%	trouble negotiating government relief packages
8%	lack of digital / ecommerce capabilities
6%	trouble negotiating debt repayment relief from bank / financier
5%	supply chain / supplier uncertainty

If respondents indicated they are continuing to operate (in a limited way or at full capacity), we asked how long their business / organisation could continue operating in the current Covid-19 conditions. 840 responded to this question. Almost a third of respondents indicated they could continue operating in the current conditions for between 3 to 6 months, whereas a quarter of respondents indicated that they could only continue operating in current conditions for between 1 to 3 months.

Figure 29: operational viability in current Covid-19 conditions

2.6 Changes to business operations

We asked respondents whether they have made any changes to the way their business / organisation operates. A total of 1,001 people responded to this question. A majority of respondents have changed their delivery method (58%), while 54% said they had changed their product or service and 38% indicated e-commerce as a change in their business operations.

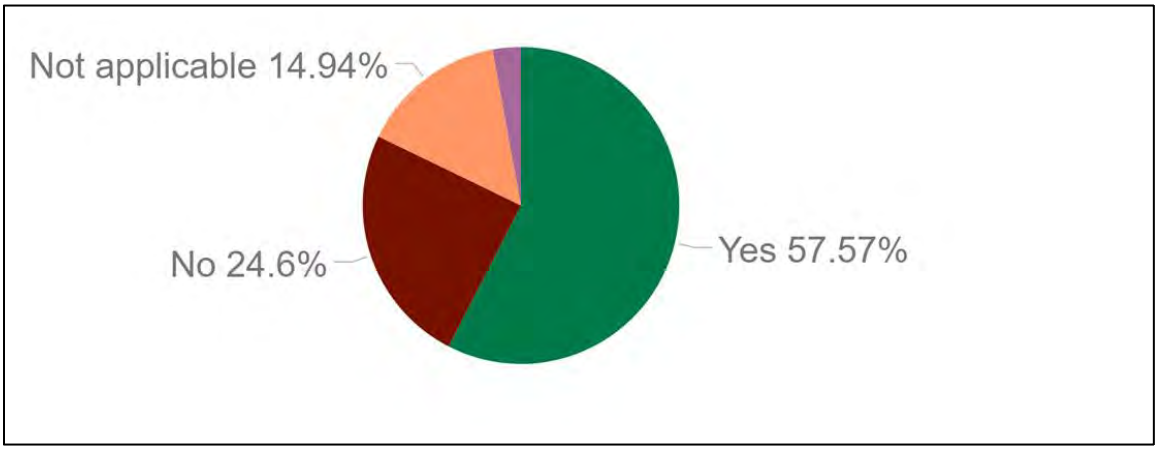

Figure 30: change in delivery method

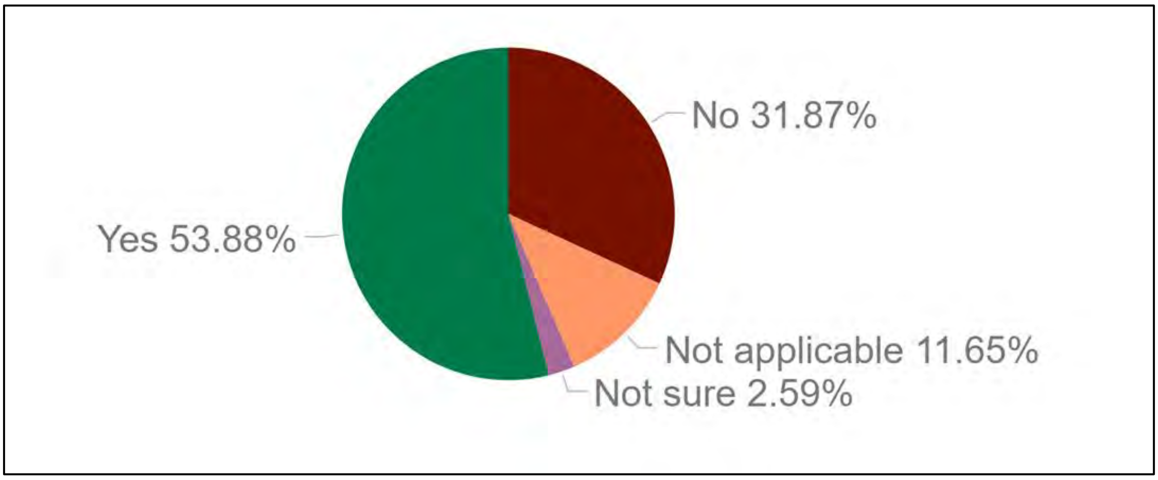

Figure 31: change in product / service

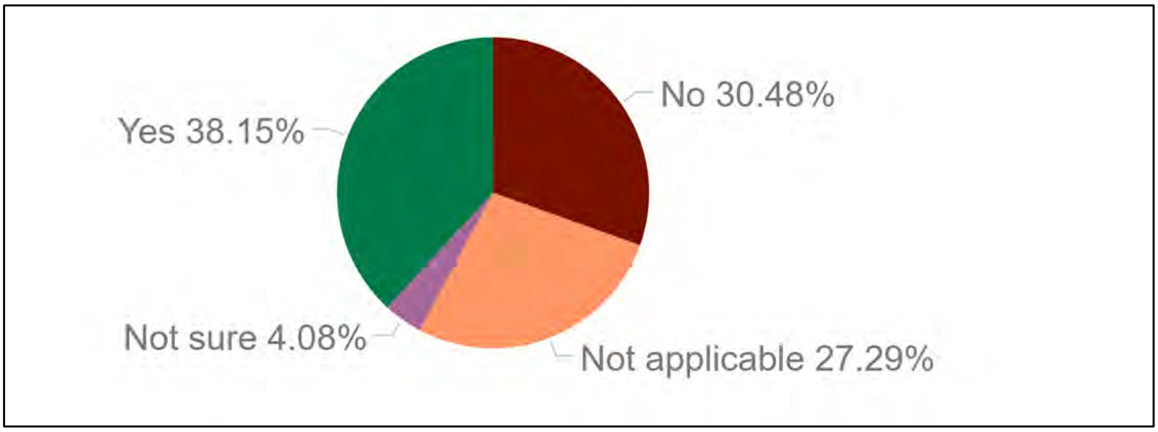

Figure 32: e-commerce

2.7 City of Sydney support (next 6-12 months)

We asked people to select the top 3 types of support businesses / organisations are likely to need from the City of Sydney over the next 6 to 12 months, given that social distancing may remain in place. Respondents were also given the option to provide individual responses. A total of 898 people responded to this question.

60%	**financial support through grants and sponsorships**
36%	**marketing and promotion**
32%	**clear and ongoing communication of support available for businesses**
23%	events and activation of local precincts
20%	advocacy for business support across other levels of government and industry
18%	less red tape and regulation
12%	free skills development and training workshops
11%	information to assist me in preparing my organisation to successfully re-open
10%	not seeking support
7%	waiving fees for outdoor dining
5%	education on government procurement processes

2.8 Areas to strengthen (over the next 12 to 18 months)

We asked which of the following areas, if any, people were looking to strengthen in their business / organisation over the next 12 to 18 months. Respondents could select all that apply and were given the option to provide individual responses. A total of 879 people responded to this question.

64%	**marketing**
51%	**strategy and planning**
40%	**customer relationship**
30%	e-commerce
28%	design and branding
26%	product development
20%	public relations
20%	financial management
18%	data analysis / business intelligence
15%	project management
13%	people management and HR
10%	accounting
7%	none
6%	logistics management

2.9 Business viability relating to Covid-19 restrictions

We asked at what stage of the Federal Government's 3 step plan to lift Covid-19 restrictions will respondents' business / organisation become viable. A total of 941 people responded to this question. A third of respondents said it would not be until step 3 restrictions are introduced that their business would become viable.

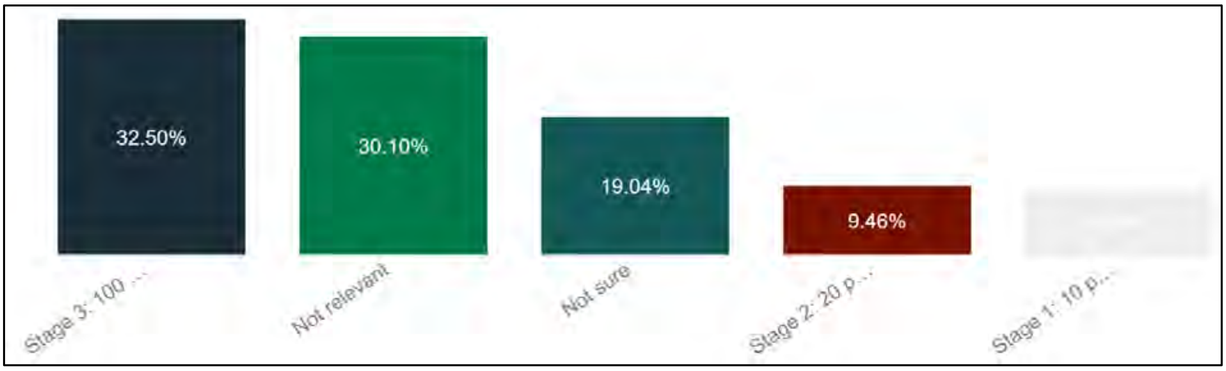

Figure 33: business viability relating to Federal Government's 3-step plan to lift Covid-19 restrictions