

## Ordinary Meeting

**Meeting Date:** Monday, 26 February, 2024

**Location:** Council Chambers, City Administrative Building, Bridge Road, Nowra

## Attachments (Under Separate Cover)

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## Monthly Investment Review



January 2024

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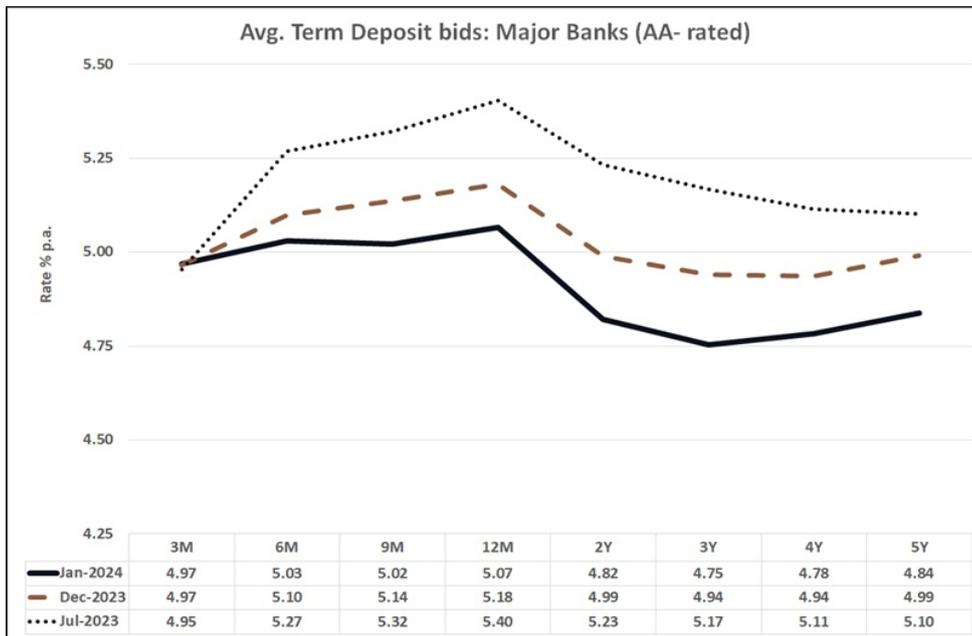
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## Market Update Summary

Financial markets continued their rally in January following the shift by central banks indicating that inflationary pressures globally have receded more quickly than they had expected. The market is now clearly focused on the timing of the first interest rate cuts in 2024.

Over January 2024, major bank deposit rates were lower across the board compared to the previous month (December 2023). Major bank deposit rates dropped by as much as 12bp across the shorter-tenors (3-12 months) and by around 15-20bp across the longer-tenors (2-5 years). Interestingly, major bank deposit rates are approximately 20-40bp lower than what they were 6 months ago (July 2023).



Source: Imperium Markets

With a global economic downturn and multiple interest rate cuts being priced in coming years, investors should consider taking an 'insurance policy' against a potentially lower rate environment by investing across 2-5 year fixed deposits, targeting rates above or close to 4%-5% p.a. (small allocation only).



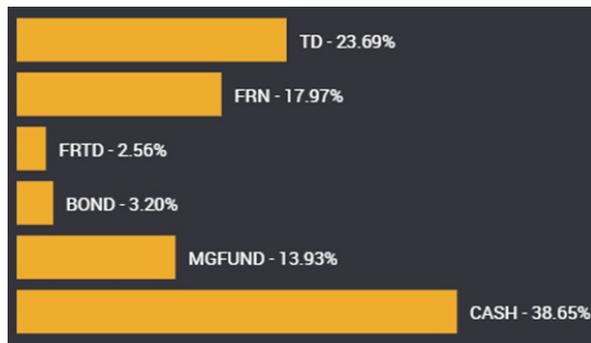
## Shoalhaven City Council 's Portfolio & Compliance

### Asset Allocation

The majority of the portfolio is directed to cash or cash notice accounts followed by fixed and floating rate term deposits. The remainder of the portfolio is directed to liquid senior FRNs, the managed fund with TCorp, as well as fixed bonds.

Senior FRNs remain relatively attractive as spreads have generally widened over the past 2 years. New issuances may be considered again on a case by case scenario. In the interim, staggering a mix of fixed deposits between 9-12 months to 3 years remains a more optimal strategy to maximise returns over a longer-term cycle.

With multiple rate cuts and a global economic downturn being priced in coming years, investors can choose to allocate a small proportion of longer-term funds and undertake an insurance policy against any potential future rate cuts by investing across 2-5 year fixed deposits, locking in and targeting yields close to or above 4%-5% p.a.





**Term to Maturity**

All maturity limits (minimum and maximum) comply with the Investment Policy. Short-Medium Term (1-2 years) assets account for around 5% of the total investment portfolio, with capacity of ~\$101m remaining.

Once the immediate capital projects are completed, we recommend a proportion of longer-dated funds be allocated to 1-3 year fixed term deposits in combination with any attractive new FRNs (3-5 years) as they come to market (refer to respective sections below).

Compliant	Horizon	Invested (\$)	Invested (%)	Min. Limit (%)	Max. Limit (%)	Available (\$)
✓	0 - 90 days	\$89,869,255	57.53%	0%	100%	\$66,334,250
✓	91 - 365 days	\$17,000,000	10.88%	0%	100%	\$139,203,505
✓	1 - 2 years	\$8,078,020	5.17%	0%	70%	\$101,264,433
✓	2 - 5 years	\$19,492,838	12.48%	0%	50%	\$58,608,915
✓	5 - 10 years	\$21,763,392	13.93%	0%	25%	\$17,287,484
		<b>\$156,203,505</b>	<b>100.00%</b>			



**Counterparty**

As at the end of January 2024, all counterparty exposures comply within the Policy limits. Capacity limits are also dependent on the movement in the cash balances. Overall, the portfolio is well diversified across the entire credit spectrum, including some exposure to the regional bank (lower rated) ADIs.

Compliant	Issuer	Rating	Invested (\$)	Invested (%)	Max. Limit (%)	Available (\$)
✓	DBS Cov	AAA	\$998,413	0.64%	100.00%	\$155,205,092
✓	Suncorp Cov	AAA	\$1,998,730	1.28%	100.00%	\$154,204,775
✓	CBA	AA-	\$59,686,809	38.21%	100.00%	\$96,516,696
✓	HSBC Bank	AA-	\$2,001,916	1.28%	100.00%	\$154,201,589
✓	NAB	AA-	\$12,991,388	8.32%	100.00%	\$143,212,117
✓	Northern Terr.	AA-	\$5,000,000	3.20%	100.00%	\$151,203,505
✓	NSW (SIRA)	AA+	\$4,115,000	2.63%	100.00%	\$152,088,505
✓	Westpac	AA-	\$6,000,000	3.84%	100.00%	\$150,203,505
✓	Macquarie	A+	\$3,979,700	2.55%	100.00%	\$152,223,805
✓	Rabobank	A+	\$3,991,792	2.56%	100.00%	\$152,211,713
✓	Suncorp	A+	\$10,765,028	6.89%	100.00%	\$145,438,477
✓	Bank of China	A	\$2,497,673	1.60%	100.00%	\$153,705,832
✓	ING Bank	A	\$14,000,000	8.96%	100.00%	\$142,203,505
✓	Bendigo-Adel.	BBB+	\$2,000,000	1.28%	10.00%	\$13,620,350
✓	AMP Bank	BBB	\$2,315,345	1.48%	5.00%	\$5,494,831
✓	Newcastle PBS	BBB	\$2,098,320	1.34%	5.00%	\$5,711,855
✓	NSW TCorp LTG	Unrated	\$21,763,392	13.93%	100.00%	\$134,440,113
			<b>\$156,203,505</b>	<b>100.00%</b>		

ANZ's takeover of Suncorp was blocked by the Australian Competition and Consumer Commission (ACCC) in early August 2023, with the watchdog saying it was unconvinced the deal would deliver the public benefits claims put forward by ANZ (although ANZ has since appealed the decision).



**Credit Quality**

The portfolio is well diversified from a credit ratings perspective. The portfolio is predominately invested amongst the investment grade ADIs (BBB- or higher). The allocation to the Unrated category reflects the investment in the TCorp Long-Term Growth Fund.

All ratings categories are within the Policy limits:

Compliant	Credit Rating	Invested (\$)	Invested (%)	Max. Limit (%)	Available (\$)
✓	AAA Category	\$2,997,143	2%	100%	\$153,206,362
✓	AA Category	\$89,795,113	57%	100%	\$66,408,392
✓	A+ to A Category	\$35,234,192	23%	100%	\$120,969,313
✓	A- Category	\$0	0%	40%	\$62,481,402
✓	BBB+ to BBB Category	\$6,413,665	4%	30%	\$40,447,387
✓	BBB- & NR Category	\$0	0%	5%	\$7,810,175
✓	NSW TCorp LTGF	\$21,763,392	14%	100%	\$134,440,113
		<b>\$156,203,505</b>	<b>100.00%</b>		

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### Performance

Council's performance for the month ending January 2024 (excluding cash) is summarised as follows:

Performance (Actual)	1 month	3 months	6 months	FYTD	1 year
Official Cash Rate	0.36%	1.08%	2.11%	2.46%	4.00%
AusBond Bank Bill Index	0.37%	1.09%	2.15%	2.53%	4.00%
T/D Portfolio	0.42%	1.17%	2.22%	2.57%	3.86%
FRT/D Portfolio	0.46%	1.33%	2.66%	3.11%	5.32%
FRN Portfolio	0.44%	1.28%	2.56%	2.99%	5.46%
Bond Portfolio	0.09%	0.27%	0.55%	0.64%	1.08%
<b>Council's Fixed Interest<sup>^</sup></b>	<b>0.41%</b>	<b>1.16%</b>	<b>2.24%</b>	<b>2.60%</b>	<b>4.19%</b>
TCorp LTGF	1.42%	8.48%	4.18%	6.02%	9.66%
TCorp Long-Term Target*	0.50%	1.48%	2.98%	3.49%	6.00%
<b>Council's Total Portfolio</b>	<b>0.62%</b>	<b>2.51%</b>	<b>2.84%</b>	<b>3.42%</b>	<b>5.27%</b>
<b>Relative (to Bank Bills)</b>	<b>0.25%</b>	<b>1.42%</b>	<b>0.69%</b>	<b>0.89%</b>	<b>1.28%</b>

<sup>^</sup>Council's Fixed Interest portfolio returns excludes Council's cash account holdings.

\*TCorp has a target of 3.5% above inflation of ~2.5%. The long-term target is therefore 6% p.a. on an ongoing basis.

Performance (Annualised)	1 month	3 months	6 months	FYTD	1 year
Official Cash Rate	4.35%	4.35%	4.22%	4.21%	4.00%
AusBond Bank Bill Index	4.44%	4.41%	4.30%	4.33%	4.00%
T/D Portfolio	5.00%	4.71%	4.46%	4.40%	3.86%
FRT/D Portfolio	5.49%	5.38%	5.35%	5.34%	5.32%
FRN Portfolio	5.28%	5.16%	5.13%	5.13%	5.46%
Bond Portfolio	1.11%	1.09%	1.09%	1.09%	1.08%
<b>Council's Fixed Interest<sup>^</sup></b>	<b>4.88%</b>	<b>4.67%</b>	<b>4.50%</b>	<b>4.45%</b>	<b>4.19%</b>
TCorp LTGF	18.03%	38.10%	8.47%	10.44%	9.66%
TCorp Long-Term Target*	6.00%	6.00%	6.00%	6.00%	6.00%
<b>Council's Total Portfolio</b>	<b>7.57%</b>	<b>10.35%</b>	<b>5.71%</b>	<b>5.88%</b>	<b>5.27%</b>
<b>Relative (to Bank Bills)</b>	<b>3.13%</b>	<b>5.95%</b>	<b>1.41%</b>	<b>1.55%</b>	<b>1.28%</b>

<sup>^</sup>Council's Fixed Interest portfolio returns excludes Council's cash account holdings.

\*TCorp has a target of 3.5% above inflation of ~2.5%. The long-term target is therefore 6% p.a. on an ongoing basis.

For the month of January, the total portfolio (excluding cash) provided a return of +0.62% (actual) or +7.57% p.a. (annualised), outperforming the benchmark AusBond Bank Bill Index return of +0.37% (actual) or +4.44% p.a. (annualised). The longer-term positive performance continues to be anchored by the handful of deposits that were originally placed for terms greater than 12 months.

The T-CorpIM Growth Fund was the main contributor to performance this month, with the Fund gaining another +1.42% (net actual) as shares continued their rally. Despite the volatility in the Fund over the past few years, the Growth Fund has performed well over longer-term time periods.



**Recommendations for Council**

**AMP Business Saver & Notice Account**

We note the AMP Business Saver and AMP 31 Day Notice Account are now sub optimal investments given the rise in deposit yields in recent months. We recommend switching into short-dated fixed deposits with the major banks yielding a considerably higher rate of return, or simply just redeem to replenish capital reserves.

**Term Deposits**

As at the end of January 2024, Council’s deposit portfolio was yielding 4.95% p.a. (up 12bp from the previous month), with a weighted average duration of ~74 days (~2½ months).

Going forward, once immediate capital projects are completed, a more optimal strategy would be staggering deposits across 9–24 months terms – this is likely to earn up to ¼–½% p.a. higher compared to shorter tenors in a normal market environment. There is growing belief that multiple rate cuts and a global economic downturn is forthcoming and so locking in rates close to or above 4¼–5% p.a. across 1–3 year tenors may provide some income protection against a lower rate environment.

Please refer to the section below for further details on the Term Deposit market.

**Securities**

Primary (new) Senior FRNs (with maturities between 3–5 years) continue to be appealing (particularly for those investors with portfolios skewed towards fixed assets) and should be considered on a case by case scenario. Please refer to the section below for further details on the FRN market.

**Council’s FRN Portfolio**

We recommend that Council retains all its FRNs at this stage (most are marked at a slight discount to par at month-end). We will continue to monitor them individually and will advise when it is appropriate to sell to boost the overall returns of the portfolio in future.

**Council’s Senior Fixed Bonds**

In September 2020, Council has invested into the following NTTC (AA–) fixed bonds:

Investment Date	Maturity Date	Principal	Rate % p.a.	Interest Paid
15/09/2021	15/12/2024	\$3,000,000	1.00%	Annually
15/09/2021	15/12/2025	\$2,000,000	1.10%	Annually
	<b>Totals / Wgt. Avg.</b>	<b>\$5,000,000</b>	<b>1.04%</b>	



We believe this was prudent at the time of investment given the low rate environment and particularly after the RBA's easing decision in early November 2020 to 0.10% and their forward guidance towards official interest rates (no rate rises "until at least 2024").

The NTTC bonds are a 'retail' offering and not 'wholesale' issuances. Given the lack of liquidity and high penalty costs if they were to be sold/redeemed prior to the maturity date, they are considered to be a hold-to-maturity investment and will be marked at par value (\$100.00) throughout the term of investment.



## NSW T-CorpIM Growth Fund

**The Growth Fund returned +1.43% (actual) for the month of January.** Both domestic shares (S&P ASX 200 Accumulation Index +1.19%) and international shares (MSCI World ex-Australia +1.20%) provided modest gains this month. Bonds also provided positive returns as yields remained relatively flat (AusBond Composite Bond Index added +0.21%).

Falling inflation has been the key driver of both market speculation and the change in tone from the US Federal Reserve (Fed), aiding positive returns across equities and bonds in recent months. The biggest surprise to expectations over the past year has been the resilience of economic growth to rapid and substantive monetary tightening. Fiscal policy has played an important role in offsetting the negative drag from higher rates. The steady and continued improvement in global supply chains have worked to reverse much of the negative shocks that reverberated through 2020-2022.

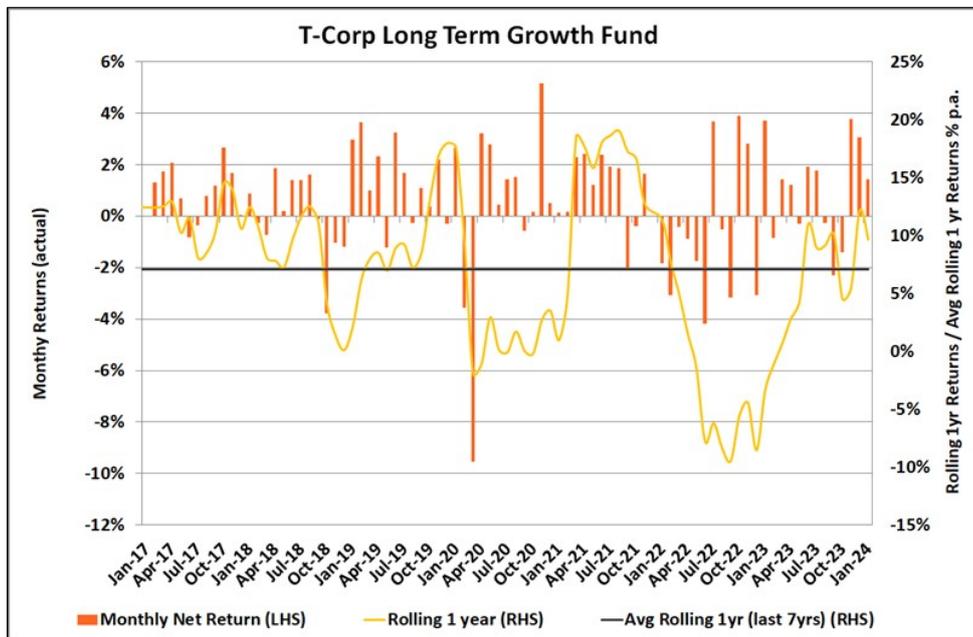
The macroeconomic outlook and general consensus has shifted to a soft landing for the global economy (from a recession), underpinned by expectations of significant central bank easing particularly from the US Fed. The main question for 2024 is will the US Fed cut as much as markets expects if there is no recession? As we have witnessed through the past eighteen months, market expectations and reality can diverge significantly and each realignment causes significant volatility across asset markets.

Overall, we remain cautious on the future performance of the T-Corp Growth Fund given the high volatility associated with a diversified growth fund, which generally allocates a range of 60%-80% in domestic and international shares. Investors are seeking relief from the elevated levels of inflation and remain hopeful that rate cuts will be delivered by the middle of 2024.

The Fund should be looked at with a long-term view, with a minimum holding period of +7 years. Given the exposure to the volatile asset of shares, Council should expect to see, on average, a negative month once every 3 months over a long-term holding period.



Since Inception	T-Corp Long Term Fund
Negative Months	143 (~1 in 3 months)
Positive Months	272
Total Months	415 (34.58 yrs)
Average Monthly Return	+0.65% (actual)
Median Monthly Return	+1.02% (actual)
Lowest 1 year Rolling Return	-21.12% p.a. (Nov 2008)
Highest 1 year Rolling Return	+29.89% p.a. (Jan 1994)



CL24.40 - Attachment 1



## Term Deposit Market Review

### Current Term Deposits Rates

As at the end of January, we see value in the following (note rates likely to be at least 5-10bp lower across the board following the lower than expected inflation print on 31<sup>st</sup> January):

Index	LT Credit Rating	Term	Rate % p.a.
ING	A	5 years	5.13%
ING	A	4 years	5.02%
ING	A	2 years	4.97%
ING	A	3 years	4.95%
BoQ	BBB+	5 years	4.95%
Suncorp	A+	2 years	4.94%
BoQ	BBB+	4 years	4.90%
Suncorp	A+	3 years	4.86%
Westpac	AA-	2 years	4.76%
NAB	AA-	2 years	4.75%

The above deposits are suitable for investors looking to maintain diversification and lock-in a slight premium compared to purely investing short-term.

For terms under 12 months, we believe the strongest value is currently being offered by the following ADIs (we stress that rates are indicative, dependent on daily funding requirements and different for industry segments):



Index	LT Credit Rating	Term	Rate % p.a.
Australian Unity	BBB+	12 months	5.19%
Suncorp	A+	12 months	5.17%
ING	A	12 months	5.17%
NAB	AA-	12 months	5.15%
Suncorp	A+	9 months	5.14%
NAB	AA-	5-9 months	5.10%
Suncorp	A+	6 months	5.10%
Bendigo	BBB+	9 months	5.06%
BoQ	BBB+	9 months	5.05%
NAB	AA-	3-4 months	5.05%
Westpac	AA-	12 months	5.02%

If Council does not require high levels of liquidity and can stagger a proportion of its investments across the longer term horizons (1–5 years), it will be rewarded over a longer-term cycle. Investing a spread of 12 months to 3 year horizons is likely to yield, on average, up to ¼–½% p.a. higher compared to those investors that entirely invest in short-dated deposits (under 6–9 months).

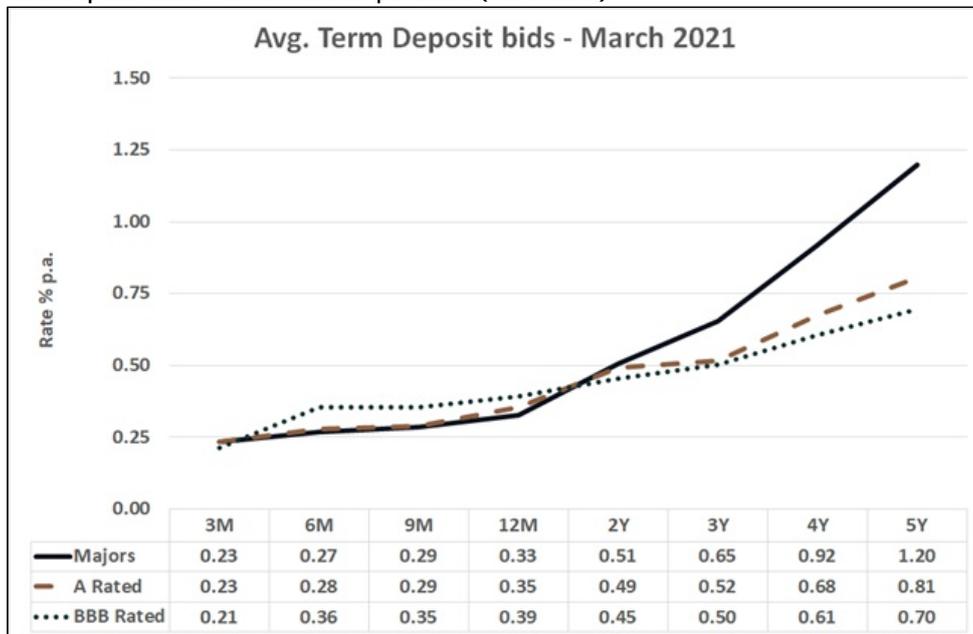
With a global economic slowdown and rate cuts being priced in coming years, investors should strongly consider and allocate some longer term surplus funds to undertake an insurance policy by investing across 2–5 year fixed deposits and locking in rates close to or above 4%–5% p.a. This will provide some income protection with central banks now likely to cut rates at some stage later this year.



**Term Deposits Analysis**

Pre-pandemic (March 2020), a 'normal' marketplace meant the lower rated ADIs (i.e. BBB category) were offering higher rates on term deposits compared to the higher rated ADIs (i.e. A or AA rated). But due to the cheap funding available provided by the RBA via their Term Funding Facility (TFF) during mid-2020, allowing the ADIs to borrow as low as 0.10% p.a. fixed for 3 years, those lower rated ADIs (BBB rated) did not require deposit funding from the wholesale deposit. Given the higher rated banks had more capacity to lend (as they have a greater pool of mortgage borrowers), they subsequently were offering higher deposit rates. In fact, some of the lower rated banks were not even offering deposit rates at all. As a result, most investors placed a higher proportion of their deposit investments with the higher rated (A or AA) ADIs over the past three years.

**Term Deposit Rates – 12 months after pandemic (March 2021)**



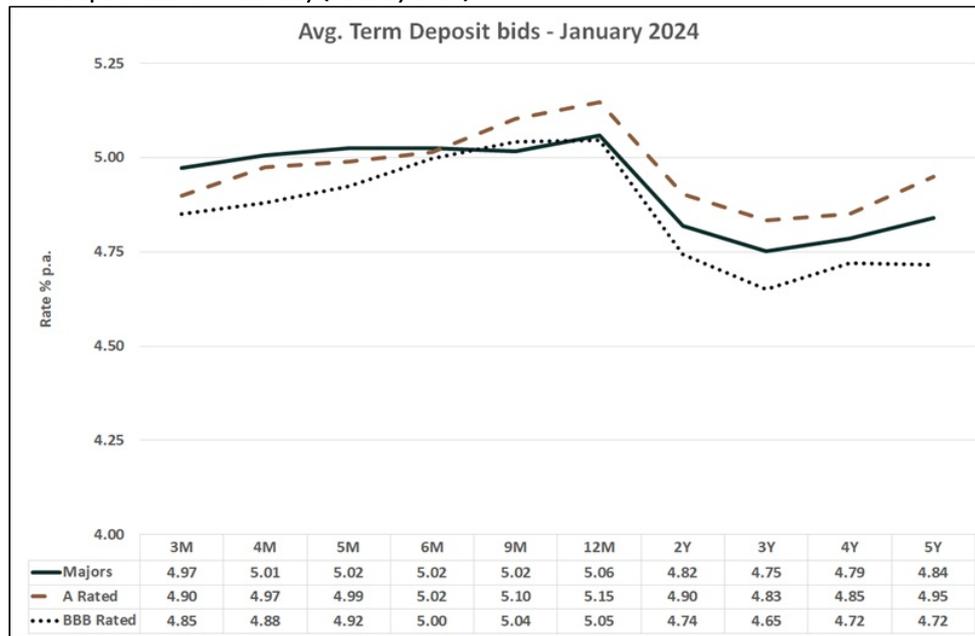
Source: Imperium Markets

The abnormal marketplace experienced during the pandemic is starting to reverse as the competition for deposits slowly increases. In recent months, we have started to periodically see some of the lower rated ADIs ("A" and "BBB" rated) offering slightly higher rates compared to the domestic major banks ("AA" rated) on different parts of the curve (i.e. pre-pandemic environment). Some of this has been attributed to lags in adjusting their deposit rates as some banks (mainly the lower rated ADIs) simply set their rates for the week.



Going forward, Council should have a larger opportunity to invest a higher proportion of its funds with the lower rated institutions (up to Policy limits), from which the majority are not lending to the Fossil Fuel industry. We are slowly seeing this trend emerge, although the past few months have been an exception, with the major banks repricing more rapidly to the movement in the bond market than their lower rated counterparts. This reversed somewhat over the past few months with the lower rated institutions (mainly "A" rated) lagging the major banks in dropping their rates:

**Term Deposit Rates – Currently (January 2024)**



Source: Imperium Markets

**Regional & Unrated ADI Sector**

Ratings agency S&P has commented that "mergers remain compelling for mutual lenders" in providing smaller lenders greater economies of scale and assisting them in being able to price competitively and will see "the banking landscape will settle with a small number of larger mutual players". S&P expects that consolidation to continue over the next two years.

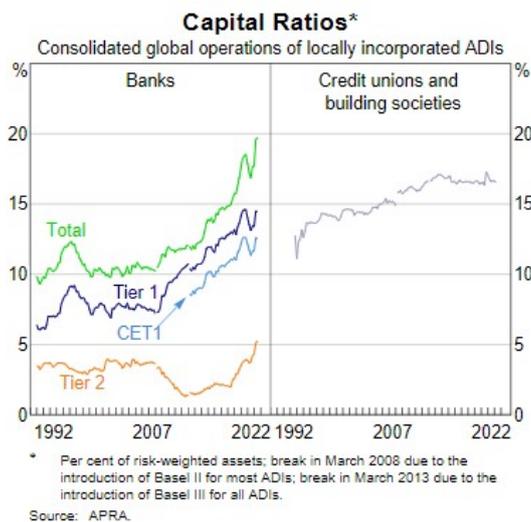
We remain supportive of the regional and unrated ADI sector (and have been even throughout the post-GFC period). They continue to remain solid, incorporate strong balance sheets, while exhibiting high levels of capital – typically, much higher compared to the higher rated ADIs. Some unrated ADIs have up to 25-40% more capital than the domestic major banks, and well above the Basel III requirements.



Overall, the lower rated ADIs (BBB and unrated) are generally now in a better financial position than they have been historically (see the Capital Ratio figure below). The financial regulator, APRA has noted that the Common Equity Tier 1 capital of Australian banks now exceeds a quarter of a trillion dollars. It has increased by \$110 billion, or more than 70%, over the past ten years. Over the same time, banks' assets have grown by 44%. Some of the extra capital is supporting growth in the banking system itself but clearly, there has been a strengthening in overall resilience and leverage in the system is lower.

We believe that deposit investments with the lower rated ADIs should be considered going forward, particularly when they offer 'above market' specials. Not only would it diversify the investment portfolio and reduce credit risk, it would also improve the portfolio's overall returns. The lower rated entities are generally deemed to be the more 'ethical' ADIs compared to the higher rated ADIs.

In the current environment of high regulation and scrutiny, all domestic (and international) ADIs continue to carry high levels of capital. There is minimal (if any) probability of any ADI defaulting on their deposits going forward – this was stress tested during the GFC and the pandemic period. APRA's mandate is to "protect depositors" and provide "financial stability".



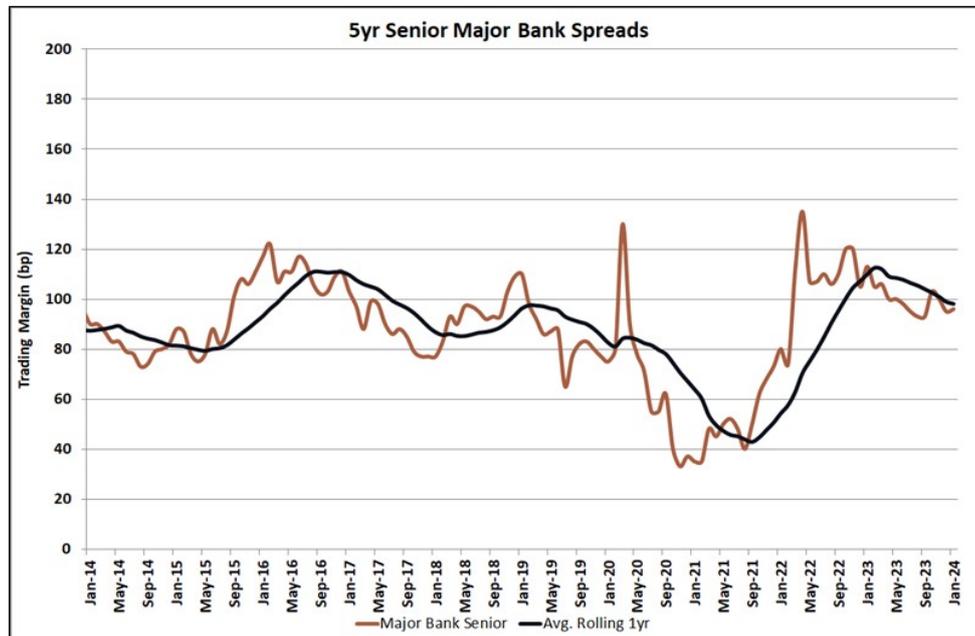


## Senior FRNs Market Review

Over January, amongst the senior major bank FRNs, physical credit securities widened up to 9bp at the long-end of the curve. During the month, there were notable new issuances from:

- WBC (AA-) ~3yr & 5yr senior security at +82bp and +100bp respectively
- ANZ (AA-) 3 & 5yr senior security at +80bp and +96bp respectively
- QTC (AA+) 10yr fixed sustainable bond at 4.75% s.a.

Major bank senior securities remain at fair value on a historical basis (5yr margins around +96bp level).



Source: IBS Capital

During the month, the other new notable issuances were as follows:

- Great Southern Bank (BBB) 3yr senior FRN at +160bp
- Mizuho (A) 3yr senior FRN at +88bp
- Heritage (BBB) 3yr senior FRN at +160bp



Amongst the “A” and “BBB” rated sectors, the securities remained relatively flat at the longer-end of the curve. Credit securities are looking much more attractive given the widening of spreads over the past ~2 years. FRNs will continue to play a role in investor’s portfolios mainly on the basis of their liquidity and the ability to roll down the curve and gross up returns over future years (in a relatively stable credit environment).

Senior FRNs (ADIs)	31/01/2024	31/12/2023
“AA” rated – 5yrs	+96bp	+95bp
“AA” rated – 3yrs	+80bp	+71bp
“A” rated – 5yrs	+125bp	+125bp
“A” rated – 3yrs	+99bp	+97bp
“BBB” rated – 3yrs	+148bp	+148bp

Source: IBS Capital

We now generally recommend switches (‘benchmark’ issues only) into new primary issues, out of the following senior FRNs that are maturing:

- On or before early 2026 for the “AA” rated ADIs (domestic major banks);
- On or before early 2025 for the “A” rated ADIs; and
- Within 6–9 months for the “BBB” rated ADIs (consider case by case).

Investors holding onto the above senior FRNs (‘benchmark’ issues only) in their last few years are now generally holding sub optimal investments and are not maximising returns by foregoing realised capital gains. In the current challenging economic environment, any boost in overall returns should be locked in when it is advantageous to do so, particularly as switch opportunities become available.



## Senior Fixed Bonds – ADIs (Secondary Market)

With global inflation still high by historical standards, this has seen a significant lift in longer-term bond yields over the past 2 years (valuations have fallen) as markets have reacted sharply.

This has resulted in some opportunities in the secondary market. We currently see value in the following fixed bond lines, with the majority now being marked at a significant discount to par (please note supply in the secondary market may be limited on any day):

ISIN	Issuer	Rating	Capital Structure	Maturity Date	~Remain. Term (yrs)	Fixed Coupon	Indicative Yield
AU3CB0273407	UBS	A+	Senior	30/07/2025	1.50	1.20%	5.07%
AU3CB0280030	BoQ	BBB+	Senior	06/05/2026	2.27	1.40%	5.14%
AU3CB0299337	Bendigo	BBB+	Senior	15/05/2026	2.29	4.70%	5.10%
AU3CB0296168	BoQ	BBB+	Senior	27/01/2027	2.99	4.70%	5.16%

CL24.40 - Attachment 1



## Economic Commentary

### International Market

Financial markets continued their rally in January following the shift by central banks indicating that inflationary pressures globally have receded more quickly than they had expected. With global economic activity and labour markets continuing to gradually cool, investors are becoming more confident of a soft landing, reflected by the fall in bond yields and a rise in equities in recent months.

Across equity markets, the S&P 500 Index gained +1.59%, whilst the NASDAQ added +1.02%. Europe's main indices also experienced further gains, led by France's CAC (+1.51%) and Germany's DAX (+0.91%). UK's FTSE (-1.33%) was the exception, losing ground against global trends.

In the US, the latest core personal consumption expenditures (PCE) index, which is the US central bank's preferred measure of inflation (which excludes volatile food and energy costs), recorded a +0.2% increase for the month of December, taking the annual rate to +2.9%.

The US economy grew at a +3.3% annual rate in the fourth quarter of 2023, which was well above the +2.0% consensus, though down from the +4.9% rate in the third quarter.

As widely expected, the Bank of Japan, European Central Bank (ECB) and Bank of Canada all held their respective interest rates steady at their policy meetings. The commentary accompanying their monetary policy decisions were largely unchanged, with these central banks reaffirming their commitment to fight inflation.

Germany reported that GDP had shrunk -0.3% for the calendar year of 2023 and in Q4 - though the Eurozone's biggest economy has been spared a technical recession in H2 2023 by an upward revision Q3, from -0.1% to 0.0%.

China is sinking deeper into its worst deflation in years. It signals continuing economic distress in China, which could mean weaker sales for Western brands that do business there. China's population also fell by 2 million last year, highlighting the challenges facing the world's second-largest economy.

The World Bank released the latest edition of its Global Economics Prospects. It provided a fairly pessimistic view, with advanced economies GDP growth set to slow, from +1.5% on average in 2023 to +1.2% in 2024.

The MSCI World ex-Aus Index rose +1.20% for the month of January:

Index	1m	3m	1yr	3yr	5yr	10yr
S&P 500 Index	+1.59%	+15.54%	+18.86%	+9.27%	+12.37%	+10.52%
MSCI World ex-AUS	+1.20%	+15.71%	+15.51%	+6.51%	+9.72%	+7.36%
S&P ASX 200 Accum. Index	+1.19%	+13.99%	+7.09%	+9.56%	+9.71%	+8.39%

Source: S&P, MSCI



**Domestic Market**

The consumer price index (CPI) rose +0.6% during Q4 2023, resulting in an annual increase of +4.1%. Inflation has fallen to its lowest level in two years, dampening the chances of a further interest rate rise. The monthly measure of inflation also showed price pressures easing even further. This measure dropped to +3.4% in December from +4.3% in November. The measure of underlying inflation eased to +4.0% from +4.6%.

Employment fell a sharp -65.1k in December, following the upwardly revised +72.6k surge in November and October's +44.2k. The unemployment rate was unchanged at 3.9% (or 3.8820% unrounded). Since October 2022, the unemployment rate has risen by 0.47%, highlighting that whilst the labour market remains tight, the degree of tightness in the labour market is easing.

Retail sales rose +2.0% m/m in November (consensus +1.2%). That reflects the shift towards increased spending at Black Friday rather than a trend acceleration in what remains sluggish consumer spending growth. Consumers delayed spending from October (when retail sales fell -0.4% m/m) to November and likely also pulled forward more spending from December.

Dwelling approvals rose +1.6% m/m in November, as a rise in attached approvals offset a small fall in detached approvals.

The November goods trade surplus rose to \$11.4bn (consensus \$7.3bn), from an upwardly revised \$7.7bn. The large surprise was driven by a fall back in imports (-7.9% m/m or -\$2.99bn).

The Government announced changes to stage three tax cuts. Those earning \$200,000 or more will receive a \$4,529 cut, instead of the legislated \$9,075 they were due to receive from 1 July. Those earning between \$45,000 and \$135,000 will be taxed at 30%, while the 37% tax rate will be reinstated and apply to incomes between \$135,000 and \$190,000, after which the 45% rate will apply.

Iron ore prices tumbled by the most in at least five months on concerns about a weakening economy of top consumer China and heightened tensions in the Taiwan Strait and the Red Sea.

The Australian dollar fell -3.89%, finishing the month at US65.74 cents (from US68.40 cents the previous month).

**Credit Market**

The global credit indices remained relatively flat over January as risk markets continued their rally. They are now back to their levels in early 2022 (prior to the rate hike cycle from most central banks):

Index	January 2024	December 2023
CDX North American 5yr CDS	55bp	56bp
iTraxx Europe 5yr CDS	60bp	60bp
iTraxx Australia 5yr CDS	68bp	72bp

Source: Markit



## Fixed Interest Review

### Benchmark Index Returns

Index	January 2024	December 2023
Bloomberg AusBond Bank Bill Index (0+YR)	+0.37%	+0.37%
Bloomberg AusBond Composite Bond Index (0+YR)	+0.21%	+2.69%
Bloomberg AusBond Credit FRN Index (0+YR)	+0.44%	+0.51%
Bloomberg AusBond Credit Index (0+YR)	+0.41%	+2.10%
Bloomberg AusBond Treasury Index (0+YR)	+0.16%	+2.77%
Bloomberg AusBond Inflation Gov't Index (0+YR)	-0.69%	+4.65%

Source: Bloomberg

### Other Key Rates

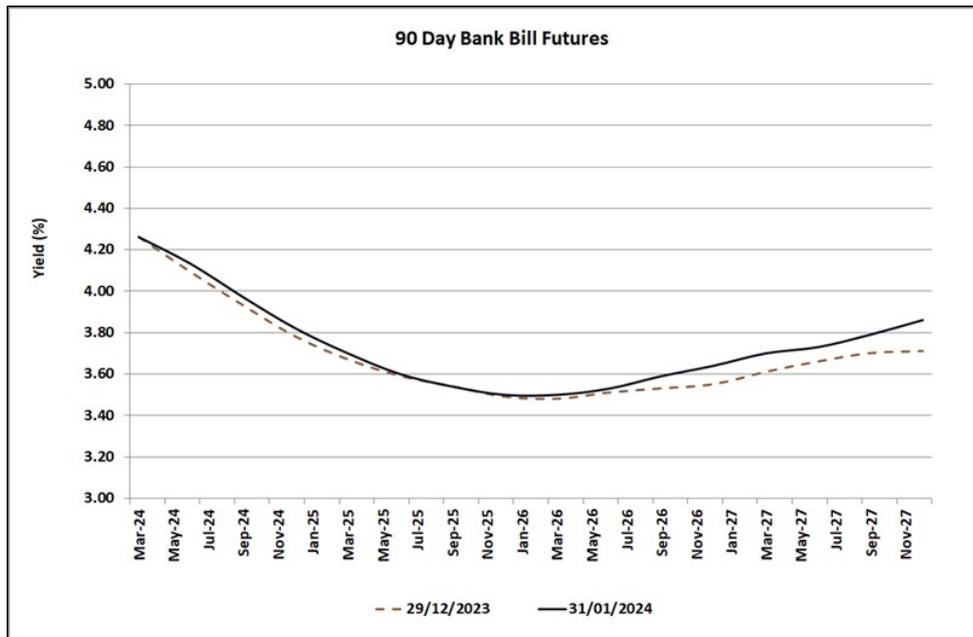
Index	January 2024	December 2023
RBA Official Cash Rate	4.35%	4.35%
90 Day (3 month) BBSW Rate	4.35%	4.36%
3yr Australian Government Bonds	3.45%	3.61%
10yr Australian Government Bonds	4.01%	3.96%
US Fed Funds Rate	5.25%-5.50%	5.25%-5.50%
2yr US Treasury Bonds	4.27%	4.23%
10yr US Treasury Bonds	3.99%	3.88%

Source: RBA, ASX, US Department of Treasury



**90 Day Bill Futures**

Bill futures marginally rose at the long-end of the curve, following the movement in the global bond market. The focus from the market remains on when the first rate cut will be delivered:



Source: ASX

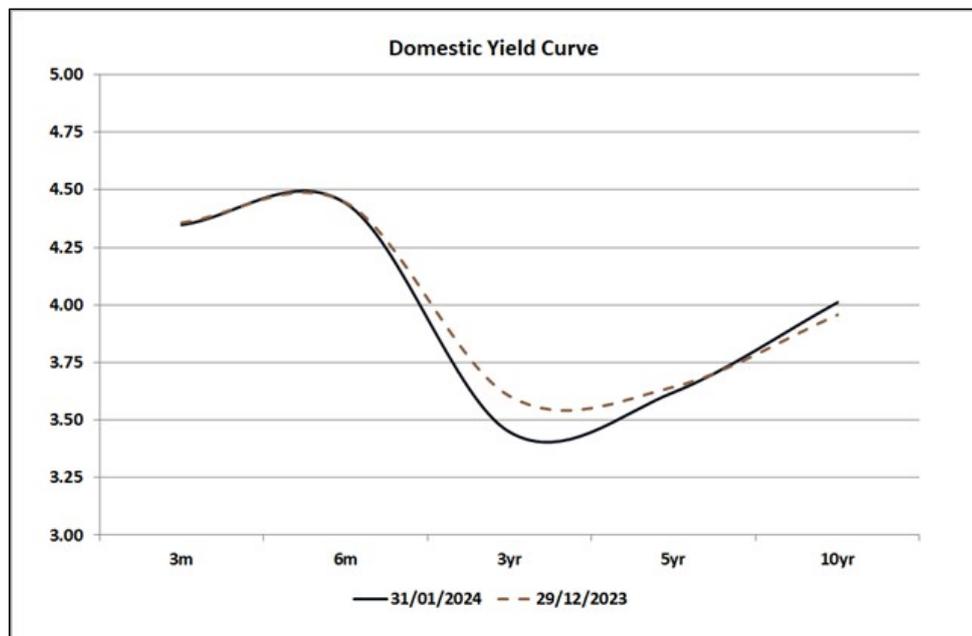


## Fixed Interest Outlook

There is uncertainty when central banks will start to cut official rates in 2024. In recent weeks, financial markets have been pricing more and more delays for rate cuts, particularly in the US, suggesting that with the economy seemingly in relatively good health, there is no immediate need to cut rates quickly. This was supported by the stronger than expected US economic growth recorded in the last quarter of 2023 of +3.3% on an annual basis (which was well above the +2.0% forecast). Nevertheless, financial markets continue to price in more than 100bp of US Fed rate cuts in 2024.

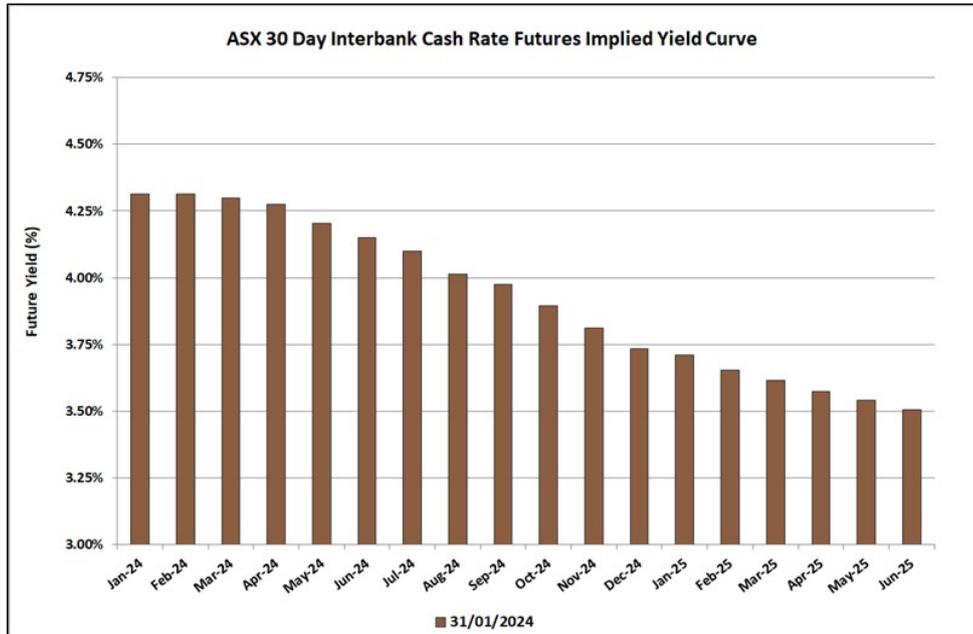
The Fed’s pivot in monetary policy stance (easing bias) has reduced the risk of the RBA needing to raise rates in the immediate future. The RBA remains on a mild tightening bias, with the Board commenting that whilst the trend in global inflation has been favourable, it was heavily caveated, consistent with them waiting for the Q4 CPI (on 31<sup>st</sup> January). Inflation did print lower than expected, so this may allow the RBA to remove its mild tightening bias for its meeting on the 6<sup>th</sup> February.

Over the month, longer-term yields rose by 5bp at the very long end of the curve:



Source: ASX, RBA

The consensus from the broader market is that we have reached the peak of the interest rate cycle. Financial markets have pushed forward their rate cut expectations, with the first rate cut fully priced in by July 2024 following the lower than anticipated inflation number.



Source: ASX

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# 2023 AUSTRALIAN LIVEABILITY CENSUS SHOALHAVEN CITY COUNCIL

## EXECUTIVE SUMMARY REPORT

**Shoalhaven City Council participated as a Strategic Partner in the 2023 Australian Liveability Census (26 March - 30 June 2023).**

**This is report 1 of 3. It provides a high level summary of the results from residents of Shoalhaven and the rest of Australia.**

## Greater Cities Commission

Shoalhaven City Council's participation in the 2023 Liveability Census has been supported by the Greater Cities Commission.

This document is has been designed to be printed at A4.

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### **PLACE SCORE**

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*We pay our respects to the traditional owners of this land, their Elders past, present and emerging, and acknowledge the continued rich culture and heritage of all Aboriginal people on this land.*

## 2023 Australian Liveability Census

### THE AUSTRALIAN LIVEABILITY CENSUS

Liveability is something that we all want to achieve for our communities, but historically it has also been difficult to measure and track. Liveability measurement has relied on secondary data such as health, crime and service locations, or external liveability rankings, but none of these capture what it is actually like for a community to live in their neighbourhood.

The Australian curriculum defines liveability 'as an assessment of what it is like to live in a place'. This is what the Australian Liveability Census covers. The results reveal what really matters to local communities and their priorities and ideas for making their neighbourhood better for them.

There are four categories of results:

#### 1. COMMUNITY VALUES

Fifty neighbourhood place attributes are ranked according to how many people said they would value them in their ideal neighbourhood. Care Factor or CF data reveals where your community is in agreement and possible areas of conflict.

#### 2. PLACE EXPERIENCE

Which place attributes contribute to or detract from liveability? Place experience or PX reveals how your community rates the lived experience of their current suburb of residence. Your PX Score is an aggregate of all the responses to produce an average liveability score for your whole area. Scores for significant attributes are included in this report.

### 3. STRENGTHS AND PRIORITIES

These actionable insights identify the place attributes that are highly valued and contributing positively - strengths; and those that are highly valued but performing poorly - priorities. Both may require investment, either to nurture and protect strengths or to improve what will bring the most significant benefit to the majority of your community.

### 4. COMMUNITY IDEAS

All respondents were also invited to share what would make their neighbourhood a better place for them to live in. These qualitative responses provide a wealth of local expertise to guide action in liveability improvements.

### ACCESSING YOUR DATA

This *Executive Summary Report* provides a high level overview of the results collected for your area during the 2023 Australian Liveability Census (26th March - 30th June).

Further data, analysis and insights are available, if commissioned, via:

- *Priorities, Values & Performance Report* (Census Partner)
- *Strategic Performance Report* (Strategic Partner)
- *Liveability Platform* (by proposal)

For more information on these options contact [LC23@placescore.org](mailto:LC23@placescore.org).

### ABOUT THE 2023 DATA

Data was collected between 26th March and 30th June through our local and state government partners, our corporate and not-for-profit partners, social media campaigns, direct email and on-site field work.

This report includes all data collected for your area and has not been weighted.

### 2023 PARTNERS

We'd like to thank our 60 partners, including:



# 2023 Australian Liveability Census

## NATIONAL RESULTS

This page provides a snapshot of the key findings. Further analysis is available in the *2023 State of Place* report.

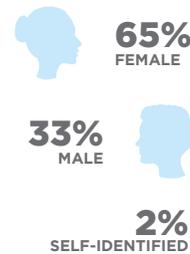
### NOTES

1. The national Community Values (Care Factor, CF) data has a confidence level of 95% ± 0.6%.
2. The national Performance (Place Experience, PX) data has a confidence level of 95% ± 0.3%.
3. Source: ABS 2021 Census.
4. Strength = high value + high performance  
Priority = high value + low/mid performance

## RESPONSES



Community Values	n = 25,870 <sup>1</sup>
Performance	n = 25,830 <sup>2</sup>
Population	25,422,788 <sup>3</sup>



### HOW DO WE COMPARE?

Everyone experiences their neighbourhoods differently.

Seeing community satisfaction with liveability through the eyes of different groups reveals important insights that can maximise social impact and community benefit.

**82% ARE SATISFIED WITH LIVEABILITY IN THEIR LOCAL NEIGHBOURHOOD<sup>2</sup>:**

- 82% AGED 15-24
- 80% AGED 25-44
- 82% AGED 45-64
- 85% AGED 65+
- 84% MALE
- 82% FEMALE
- 73% OTHER GENDER

**PEOPLE LIVING IN MEDIUM TO HIGH DENSITY HOUSING RATE LIVEABILITY HIGHER THAN THOSE LIVING IN STANDALONE HOUSES<sup>2</sup>**

**THOSE BORN OVERSEAS RATE LIVEABILITY THE SAME AS THOSE BORN IN AUSTRALIA<sup>2</sup>**

**ABORIGINAL AND TORRES STRAIT ISLANDER PEOPLE RATE LIVEABILITY LOWER THAN AVERAGE<sup>2</sup>**

## KEY NATIONAL RESULTS



### Liveability Performance Australia<sup>2</sup>

The National Liveability Average is 67 out of 100.

Scores for individual local government areas ranged between 53 and 81.

#1

LIVEABILITY PERFORMER AUSTRALIA<sup>2</sup>

7.7 / 10

Welcoming to all people



### We should nurture

Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)

#1  
LIVEABILITY VALUE IN AUSTRALIA<sup>1</sup>

### 71% value...

Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)

#50

LIVEABILITY PERFORMER AUSTRALIA<sup>2</sup>

5.1 / 10

Things to do in the evening (bars, dining, cinema, live music etc.)



### We should manage

General condition of public open space (street trees, footpaths, parks etc.)

## Your Results

This page provides a snapshot of the key findings for Shoalhaven.

### NOTES

1. The local Community Values (Care Factor, CF) data has a confidence level of 95% ± 3.7%.
2. The local Performance (Place Experience, PX) data has a confidence level of 95% ± 1.9%.
3. Source: ABS 2021 Census.
4. Strength = high value + high performance  
Priority = high value + low/mid performance

### RESPONSES



Responses from across your area

Community Values	n = 711 <sup>1</sup>
Performance	n = 681 <sup>2</sup>
Population	108,531 <sup>3</sup>

#### IS LIVEABILITY THE SAME FOR EVERYONE?

Planning for everyone in your community needs a solid foundation that reveals how different people are experiencing their neighbourhoods.

**77% ARE SATISFIED** WITH LIVEABILITY IN THEIR LOCAL NEIGHBOURHOOD<sup>2</sup>:

- 67% AGED 15-24**
- 73% AGED 25-44**
- 76% AGED 45-64**
- 81% AGED 65+**
- 76% FEMALE**
- 81% MALE**
- 64% OTHER GENDER**

**PEOPLE LIVING IN MEDIUM TO HIGH DENSITY HOUSING RATE LIVEABILITY LOWER THAN THOSE LIVING IN STANDALONE HOUSES<sup>2</sup>**

**THOSE BORN OVERSEAS RATE LIVEABILITY THE SAME AS THOSE BORN IN AUSTRALIA<sup>2</sup>**

**ABORIGINAL AND TORRES STRAIT ISLANDER PEOPLE RATE LIVEABILITY LOWER THAN AVERAGE<sup>2</sup>**

### KEY RESULTS



#### Liveability Performance<sup>2</sup>

Your PX Score out of 100 is comprised of the averaged results of all responses for 50 neighbourhood place attributes in your area.

**#1**  
LIVEABILITY PERFORMER<sup>2</sup>

**8.3 / 10**

**Elements of natural environment** (natural features, views, vegetation, topography, water, wildlife etc.)



#### You should nurture

**Elements of natural environment** (natural features, views, vegetation, topography, water, wildlife etc.)

**#1**  
LIVEABILITY VALUE<sup>1</sup>

**77% value...**

**Elements of natural environment** (natural features, views, vegetation, topography, water, wildlife etc.)

**#50**  
LIVEABILITY PERFORMER<sup>2</sup>

**4.3 / 10**

**Things to do in the evening** (bars, dining, cinema, live music etc.)



#### You should prioritise

**General condition of public open space** (street trees, footpaths, parks etc.)

Shoalhaven  
New South Wales



NOTES

1. The local Performance (Place Experience, PX) data has a confidence level of 95% ± 1.9%.
2. The national Performance (Place Experience, PX) data has a confidence level of 95% ± 0.3%.

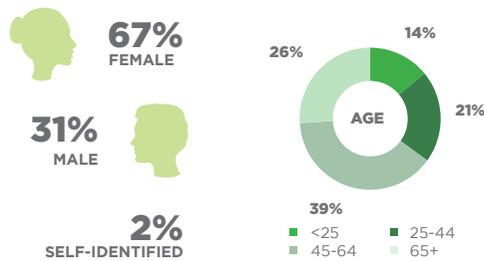
LIVEABILITY PERFORMANCE

Place Score invited people in your community to assess the liveability of their own neighbourhoods by rating 50 Place Attributes<sup>1</sup>. These Place Attributes cover a broad range of themes: open space, movement, local character, economy and more.

Some neighbourhoods may perform well in one theme but less well in others. National<sup>2</sup> comparison data is shown here for three themes (Movement, Community, Management and Safety), encompassing 19 Place Attributes.



ABOUT YOUR RESPONDENTS



MOVEMENT

Relates to the movement of people and goods and connectivity.

COMMUNITY

Relates to people's identity, how they express that identity, and how they interact and define the broader community.

MANAGEMENT AND SAFETY

Relates to the management of an area and its users feelings of safety.

NET PROMOTER SCORE<sup>1</sup>

How likely is your community to recommend your LGA?

NPS is a universal measure of community loyalty. The difference between the percentage of Promoters and Detractors results in a NPS between -100 and +100.



# Shoalhaven

New South Wales

**NOTES**

- Care Factor rank where #1 is most valued and #50 is least valued.
- Place Experience Score out of 10.

### CELEBRATE YOUR STRENGTHS

Liveability Strengths are Place Attributes that are valued by most people in your community, and which are performing well.

Liveability Priorities are Place Attributes that are valued by most people in your community, however, their performance is impacting them negatively.

Build on strengths and improve priorities - invest where there will be most community benefit.

#### TOP 3 LIVEABILITY STRENGTHS

CF# <sup>1</sup>	STRENGTHS	PX <sup>2</sup>
1	Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)	8.3
8b	Local businesses that provide for daily needs (grocery stores, pharmacy, banks etc.)	7.0
8a	Sense of personal safety (for all ages, genders, day or night)	7.3

#### TOP 3 LIVEABILITY PRIORITIES

CF# <sup>1</sup>	PRIORITIES	PX <sup>2</sup>
2	General condition of public open space (street trees, footpaths, parks etc.)	5.6
5	Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)	5.7
12	Quality of public space (footpaths, verges, parks etc.)	5.4

### YOUR COMPETITIVE ADVANTAGE

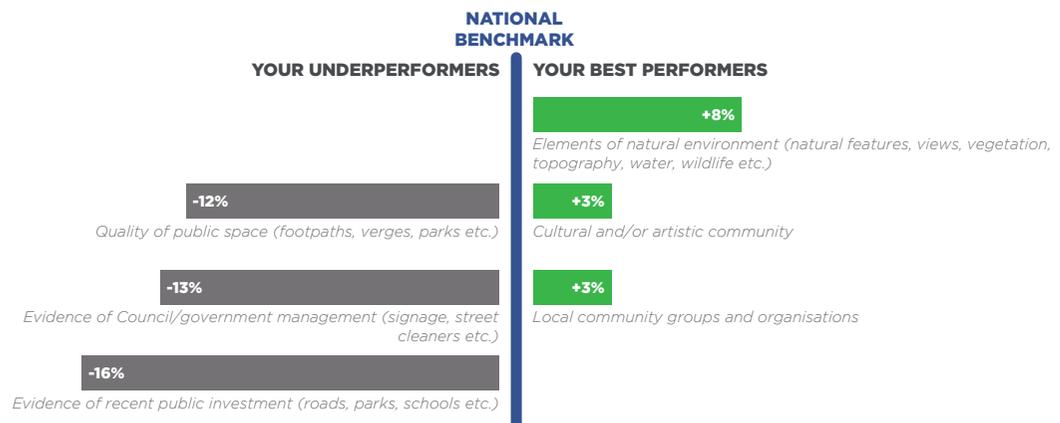
Every place has something that already is, or can be built into, a competitive advantage.

Your best performers are opportunities to distinguish your LGA from the pack. Consideration should be given to who values these attributes and how you can attract them to your area.

Underperformers can reveal your weaknesses but may not necessarily be priorities - if your community, or the segment you are trying to attract, does not value them.

### NATIONAL BENCHMARK COMPARISON

This graph compares the performance of your LGA with Place Score's National Benchmark.



Nationally, the largest number of people value the following attributes:

- Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.) (71% vs 77% in your LGA)
- General condition of public open space (street trees, footpaths, parks etc.) (66% vs 59% in your LGA)
- Access to neighbourhood amenities (cafes, shops, health and wellness services etc.) (56% vs 49% in your LGA)

# Shoalhaven

New South Wales

## HOW DO YOU COMPARE?

Understanding your strengths and weaknesses compared to the National Benchmark can help you plan to build on your competitive advantage or improve areas that are underperforming.

**NOTES**

1. The blue area in the graph represents the margin of error. The attributes in this area could be lower, higher or the same as the National Benchmark.

**PX SCORES**

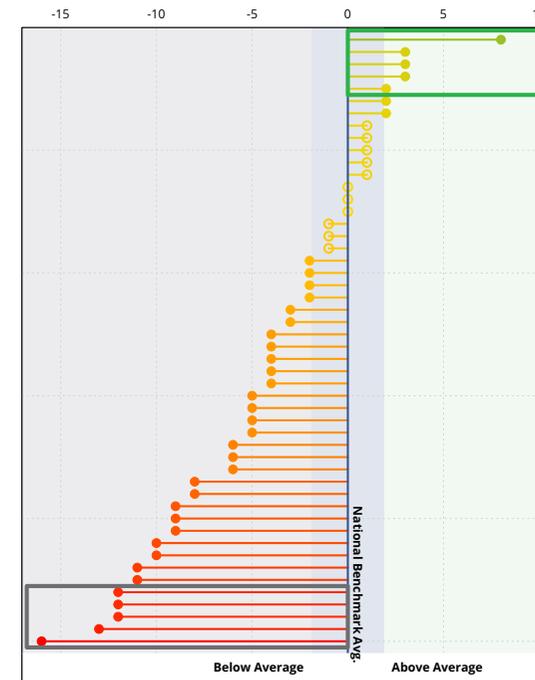


**BEST AND UNDERPERFORMING ATTRIBUTES<sup>1</sup>**

TOP 5 ATTRIBUTES COMPARED TO THE NATIONAL BENCHMARK	VS NATIONAL BENCHMARK
<i>Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)</i>	8%
<i>Cultural and/or artistic community</i>	3%
<i>Local community groups and organisations</i>	3%
<i>Sense of belonging in the community</i>	3%
<i>Evidence of community activity (volunteering, gardening, art, community-organised events etc.)</i>	2%

BOTTOM 5 ATTRIBUTES COMPARED TO THE NATIONAL BENCHMARK	VS NATIONAL BENCHMARK
<i>Evidence of recent public investment (roads, parks, schools etc.)</i>	-16%
<i>Evidence of Council/government management (signage, street cleaners etc.)</i>	-13%
<i>Quality of public space (footpaths, verges, parks etc.)</i>	-12%
<i>Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)</i>	-12%
<i>Amount of public space (footpaths, verges, parks etc.)</i>	-12%



# Shoalhaven

New South Wales

## HIGH IMPACT INVESTMENT

Build on, and improve local liveability by investing in what matters to your community. By understanding what your community values and how they rate the performance of each Place Attribute, you can preserve what is working well and recommend the areas for investment that will bring the most benefits to your community.

These tables and graph illustrate your LGA's strengths and priorities.

### NURTURE

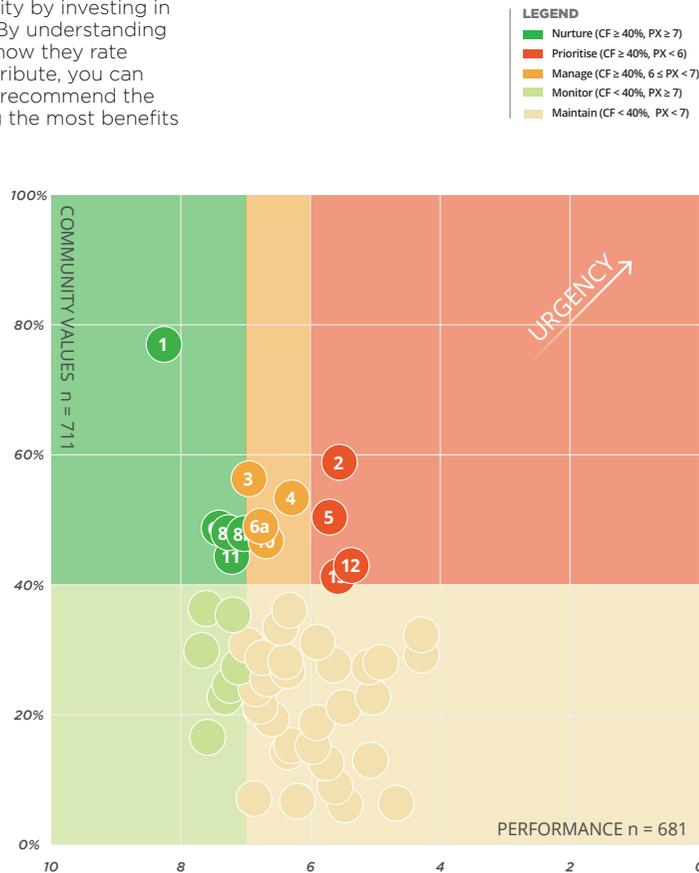
These attributes are the strongest contributors to liveability because a significant proportion of your community values them and rated them positively. Consider how to strengthen them, and protect them from potential threats.

### PRIORITISE

Increase the performance of these attributes to deliver the biggest benefit to your community. They identify aspects of your neighbourhood that are important to most people, but are currently underperforming.

### MANAGE

Not quite an emergency but not performing as well as they could. Increase investment to make them great contributors to local liveability, or maintain the current level of investment to prevent future problems.



**LEGEND**  
 Nurture (CF ≥ 40%, PX ≥ 7)  
 Prioritise (CF ≥ 40%, PX < 6)  
 Manage (CF ≥ 40%, 6 ≤ PX < 7)  
 Monitor (CF < 40%, PX ≥ 7)  
 Maintain (CF < 40%, PX < 7)

CF#	NURTURE
1	Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)
8 <sup>b</sup>	Local businesses that provide for daily needs (grocery stores, pharmacy, banks etc.)
8 <sup>a</sup>	Sense of personal safety (for all ages, genders, day or night)
6 <sup>b</sup>	Sense of belonging in the community
11	Locally owned and operated businesses

CF#	PRIORITISE
2	General condition of public open space (street trees, footpaths, parks etc.)
5	Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)
12	Quality of public space (footpaths, verges, parks etc.)
13	Access and safety of walking, cycling and/or public transport (signage, paths, lighting etc.)

CF#	MANAGE
4	Protection of the natural environment
3	Sense of neighbourhood safety (from crime, traffic, pollution etc.)
6 <sup>a</sup>	Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)
10	Landscaping and natural elements (street trees, planting, water features etc.)

**ACCESS ALL YOUR DATA**  
 To access all your results, nine themes, along with detailed performance and priorities data, contact Place Score to unlock your *Liveability Platform*, an online tool for your whole organisation.



CL24.44 - Attachment 1

# 2023 AUSTRALIAN LIVEABILITY CENSUS **SHOALHAVEN CITY COUNCIL**

## PRIORITIES, VALUES & PERFORMANCE REPORT

**Shoalhaven City Council participated as a Strategic Partner in the 2023 Australian Liveability Census (26 March - 30 June 2023).**

**This is report 2 of 3.**

**It provides directions for Council planning and policy against key themes from residents of Shoalhaven, compared with your state and Australia.**

## 2023 Australian Liveability Census

### THIS REPORT

Your organisation participated in the 2023 Australian Liveability Census as a 'Strategic Partner'. As such, attainment of a higher data collection target (n=200) has unlocked this complementary *Priorities, Values & Performance Report*.

There are four categories of results:

#### 1. COMMUNITY VALUES

Each respondent selected their 15 most important neighbourhood place attributes, out of a total of 50. Community values (Care Factor or CF) data reveals where your community is in agreement and possible areas of conflict. In this report your *Community Values* section also compares your results to the state and national averages.

#### 2. PLACE EXPERIENCE

Each respondent rated the performance of 50 neighbourhood place attributes based on their lived experience. Your Place Experience (PX) Score is an aggregate of all the responses to produce an average liveability score for your whole area. In this report the component attribute scores are listed, as well as the average scores for each council theme (sustainability, housing, open space etc.). These are included in the *Performance* section and provide key metrics for reporting.

#### 3. STRENGTHS AND PRIORITIES

These actionable insights identify the place attributes that are highly valued and contributing positively - strengths; and those that are highly valued but performing poorly - priorities. Both may require

investment, either to nurture and protect strengths or to improve what will bring the most significant benefit to the majority of your community. In this report these results are included on the *Investing for Liveability* page and provide key directions for improving liveability outcomes for your community.

#### 4. COMMUNITY IDEAS

All respondents were also invited to share what would make their neighbourhood a better place for them to live in. These qualitative responses provide a wealth of local expertise to guide action in liveability improvements. In this report a selection of community ideas have been included.

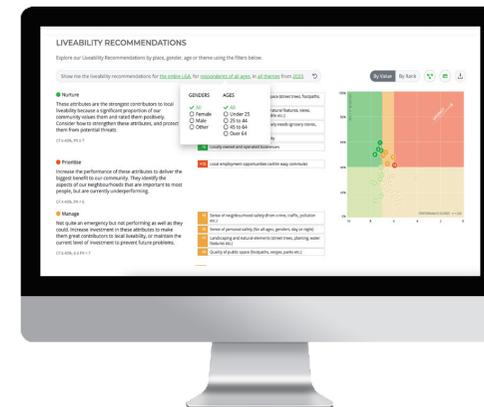
#### CONFIDENCE LEVELS

The target sample size for this report was 200 PX records. The target was exceeded leading to a higher confidence level as indicated in the following table.

Shoalhaven LGA			
2023	CF	711	95% (± 3.7%)
	PX	681	95% (± 1.9%)

### ACCESSING MORE RESULTS

Your data can also be made available via an online dashboard that allows you to filter and interrogate your results for use across your organisation and reporting requirements. For more information on this option contact [LC23@placescore.org](mailto:LC23@placescore.org).



## Investing for Liveability

More pathway down the road so people can cross and buy groceries properly.

F, U 25, SHOALHAVEN



Ensure the parks and open space areas are always maintained and beautify the street scape with more trees.

M, O 64, SHOALHAVEN



### DEFINING PRIORITIES

This section identifies the key opportunities for better community outcomes. Themes with the most Improvement Opportunities should be the focus of future investment and planning strategies. This will ensure you put your community's liveability at the heart of your decision making.

By understanding community sentiment across the whole range of council's thematic considerations, you can also identify relationships and opportunities to maximise positive impact.

### INVESTING FOR LIVEABILITY

The Liveability Snapshot graph below provides a snapshot of the relative performance of all 50 Place Attributes categorised into nine key Council themes.

The orange bars under 'Improvement Opportunities' indicate the proportion of the theme's metrics that are underperforming compared to the value community places on them. Themes that are underperforming represent the most significant opportunities for effective investment as they have the potential to uplift liveability for the largest number of people.

The green bars indicate the proportion of the theme's metrics that are over-performing compared to their level of importance. You may be able to leverage some of these strengths.

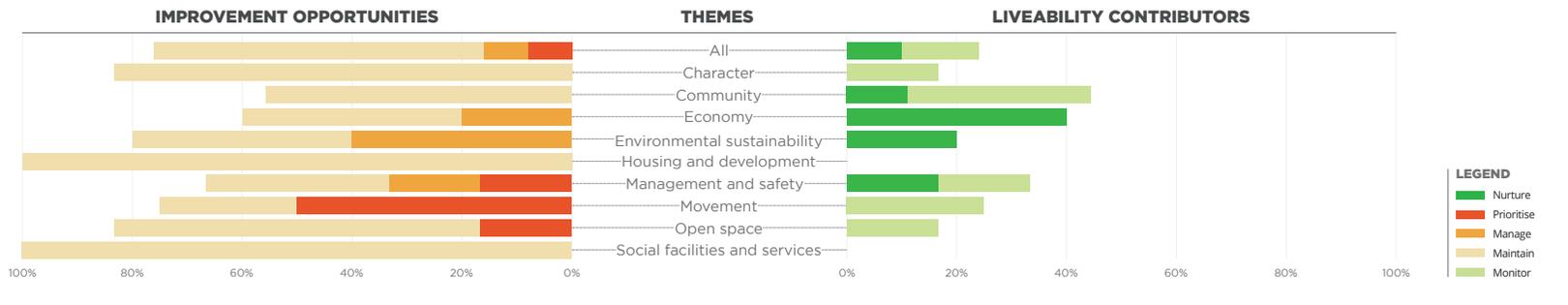
### ACTIONING YOUR COMMUNITY DIRECTIONS

The nine themes represent the most common areas of responsibility for local government. Each theme includes between four and nine metrics.

The most significant opportunity for increasing liveability outcomes for your community is by improving the following specific metrics. Each of these are highly valued by your community but under performing:

- *General condition of public open space (street trees, footpaths, parks etc.)* (#2CF 59% - PX5.6)
- *Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)* (#5CF 50% - PX5.7)
- *Quality of public space (footpaths, verges, parks etc.)* (#12CF 43% - PX5.4)

### LIVEABILITY SNAPSHOT



# Shoalhaven - Community Values

New South Wales

## WHAT IS IMPORTANT TO YOUR COMMUNITY

Every community is unique in what matters most to its members. We call this Care Factor. CF% measures the level of alignment with particular liveability attributes. The higher the percentage, the more aligned your community is.

Understanding what is important to the majority of your community, and where there may be conflict between groups who value different aspects of neighbourhood liveability, helps you develop communications strategies, apply for grants or develop business cases for new projects.

This information helps to confirm, complement, and in some cases even reduce, community consultation and subsequent consultation fatigue.

Your community's ideal neighbourhood captures the neighbourhood attributes that are important to most people. The tiles below synthesise your community's values into three shared aspirational features that reflect what is important to its members.

Improve cleaning and maintenance of local parks, including waterfront areas for public access.

**F, 0 64, SHOALHAVEN**



Footpaths, bike lanes, more off street parking, reduce speed to 40 Km/h speed humps. Wider streets, kids have no where to ride their bikes.

**M, 45-64, SHOALHAVEN**



## YOUR COMMUNITY'S IDEAL NEIGHBOURHOOD

Easy to access shared community amenities, like the local shops, on foot or bike



Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)	CF 50%
Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)	CF 49%

Locally owned and operated businesses that provide the community with their daily needs



Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)	CF 49%
Local businesses that provide for daily needs (grocery stores, pharmacy, banks etc.)	CF 48%

A well maintained and managed public domain; footpaths, parks, roads and other public assets



General condition of public open space (street trees, footpaths, parks etc.)	CF 59%
--	--------

# Shoalhaven - Community Values

New South Wales

**NOTES**

1. This table lists the top 15 Community Values for the LGA and compares them with the state and national averages.

**LEGEND**

- More valued in this LGA
- Less valued in this LGA
- Equally valued in this LGA

### ALIGNING AROUND SHARED VALUES

Community values are significant for organisational decision making because they often differ from what people complain about. Time and energy can be spent resolving conflict and addressing the complaints of a few loud voices, or it can be spent pro-actively delivering what is most important to your community.

Understanding what matters and how your community compares to others can help suggest communication topics to focus on. When managing change, keep these values top of mind. Assure your community that what matters most to them is being addressed, and ensure development partners also understand local concerns.

### BENCHMARKS AND TRENDS

Most Australians have similar values regarding neighbourhood liveability across the country. What then becomes interesting, is what makes each area unique; what do we care about more, or less, than the average. Benchmarking your community values enables you to learn about how your ideal community can be universally aligned or distinguished from other communities across the state and the country.

In addition, tracking community values over time is essential as what we care about changes. Increased development, population changes, external climate or economic factors will all impact community values. Identifying these trends will help you better plan for your community's future.

### TOP 15 COMMUNITY VALUES<sup>1</sup>

CF#	COMMUNITY VALUES	LGA	STATE	+/-%	AUS	+/-%
1	Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)	77%	72%	5%	71%	6%
2	General condition of public open space (street trees, footpaths, parks etc.)	59%	66%	-7%	66%	-7%
3	Sense of neighbourhood safety (from crime, traffic, pollution etc.)	56%	51%	5%	50%	6%
4	Protection of the natural environment	53%	47%	6%	47%	6%
5	Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)	50%	51%	-1%	51%	-1%
6 <sup>a</sup>	Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)	49%	56%	-7%	56%	-7%
6 <sup>b</sup>	Sense of belonging in the community	49%	42%	7%	42%	7%
8 <sup>a</sup>	Sense of personal safety (for all ages, genders, day or night)	48%	50%	-2%	50%	-2%
8 <sup>b</sup>	Local businesses that provide for daily needs (grocery stores, pharmacy, banks etc.)	48%	52%	-4%	52%	-4%
10	Landscaping and natural elements (street trees, planting, water features etc.)	47%	46%	1%	46%	1%
11	Locally owned and operated businesses	44%	40%	4%	41%	3%
12	Quality of public space (footpaths, verges, parks etc.)	43%	45%	-2%	44%	-1%
13	Access and safety of walking, cycling and/or public transport (signage, paths, lighting etc.)	41%	46%	-5%	46%	-5%
14 <sup>a</sup>	Physical comfort (including noise, smells, temperature etc.)	36%	31%	5%	32%	4%
14 <sup>b</sup>	Spaces suitable for specific activities or special interests (entertainment, exercise, dog park, BBQs etc.)	36%	34%	2%	35%	1%

## Shoalhaven - Performance by Theme

New South Wales

### COUNCIL WORKING THEMES

While each council has its own way of organising its responsibilities, we reviewed over 50 strategic documents to identify nine thematic working areas which are universally relevant.

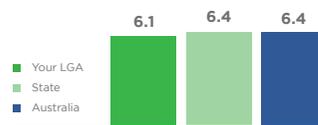
Your community's performance results are summarised on the following pages under each of these themes to provide:

- Nine Theme Performance Scores for the LGA compared to Place Score's State and National Benchmarks.
- Individual Place Attribute scores for council reporting and as a baseline for future improvement.

The results reveal important disparities and unique features of your community. You may find that your neighbourhood has performed comparatively well in one theme but less well in others. This data, in association with the *Investing for Liveability* page provides the evidence base for decision making.

### COMMUNITY PERSPECTIVES ON LIVEABILITY

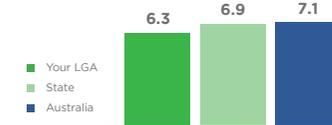
Your community has rated 50 Place Attributes to assess the liveability of their own neighbourhood. These Place Attributes include topics across a broad range of themes; open space, movement, local character, economy and more. This data forms part of a larger data set, whose usefulness will grow over time as it expands. When undertaken regularly, it also provides a time series that can help track the on-the-ground outcome of investment and measure progress and improvement.



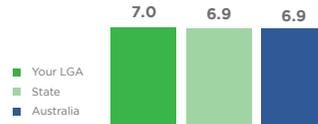
CHARACTER



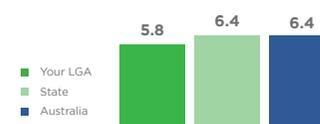
ENVIRONMENTAL SUSTAINABILITY



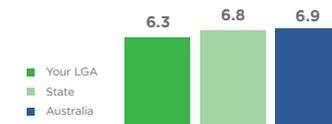
MOVEMENT



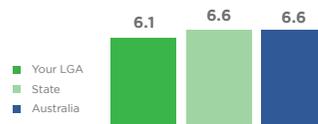
COMMUNITY



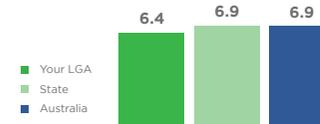
HOUSING AND DEVELOPMENT



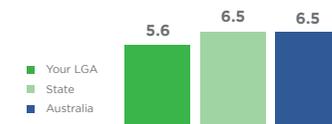
OPEN SPACE



ECONOMY



MANAGEMENT AND SAFETY



SOCIAL FACILITIES AND SERVICES

## Shoalhaven - Performance by Attribute

### New South Wales

#### CHARACTER

Relates to an area's heritage, its identity and how unique it is.

PLACE ATTRIBUTE	SCORES
Landmarks, special features or meeting places	6.4
	6.2
	6.3
Local history, historic buildings or features	5.5
	5.8
	5.7
Overall visual character of the neighbourhood	7.2
	7.4
	7.5
Sense of character or identity that is different from other neighbourhoods	6.7
	6.7
	6.7
Spaces suitable for specific activities or special interests (entertainment, exercise, dog park, BBQs etc.)	6.3
	6.9
	7.1
Unusual or unique buildings and/or public space design	4.7
	5.2
	5.2

#### COMMUNITY

Relates to people's identity, how they express that identity, and how they interact and define the broader community.

PLACE ATTRIBUTE	SCORES
Cultural and/or artistic community	6.0
	5.7
	5.7
Evidence of community activity (volunteering, gardening, art, community-organised events etc.)	6.5
	6.3
	6.3
Local community groups and organisations	6.8
	6.5
	6.5
Mix or diversity of people in the area	6.6
	7.1
	7.1
Neighbourhood spirit/resilience (from external impacts, storms, economic downturns etc.)	7.3
	7.2
	7.2
Sense of belonging in the community	7.4
	7.2
	7.1
Sense of connection to/feeling support from neighbours or community	7.0
	6.8
	6.8
There are people like me (age, gender, interests, ethnic backgrounds etc.)	7.6
	7.8
	7.7
Welcoming to all people	7.7
	7.8
	7.7

#### ECONOMY

Relates to revenue generation through different sectors and economic activities, and job creation.

PLACE ATTRIBUTE	SCORES
Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)	6.8
	7.4
	7.4
Local businesses that provide for daily needs (grocery stores, pharmacy, banks etc.)	7.0
	7.4
	7.5
Local employment opportunities (within easy commute)	5.0
	5.9
	5.9
Locally owned and operated businesses	7.2
	7.2
	7.2
Things to do in the evening (bars, dining, cinema, live music etc.)	4.3
	5.1
	5.1

**LEGEND**  
■ Your LGA  
■ State  
■ Australia

## Shoalhaven - Performance by Attribute

New South Wales

### ENVIRONMENTAL SUSTAINABILITY

Relates to the protection and care of the environment, and how people adapt to the climate.

PLACE ATTRIBUTE	SCORES
Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)	8.3
	7.5
	7.5
Landscaping and natural elements (street trees, planting, water features etc.)	6.7
	7.0
	7.1
Protection of the natural environment	6.3
	6.4
	6.5
Sustainable behaviours in the community (water management, solar panels, recycling etc.)	6.4
	6.3
	6.3
Sustainable urban design (water sensitive design, transport-oriented design, sustainable building design, density etc.)	5.1
	5.4
	5.5

### HOUSING AND DEVELOPMENT

Relates to the built form, housing, tenancy types and development.

PLACE ATTRIBUTE	SCORES
Evidence of recent private investment (renovations, landscaping, painting etc.)	6.2
	6.6
	6.6
Evidence of recent public investment (roads, parks, schools etc.)	4.3
	5.8
	5.9
Quality of buildings (design and construction of homes, shops, schools etc.)	6.8
	7.0
	7.0
Range of housing prices and tenures (low to high \$, buy or rent etc.)	5.1
	5.4
	5.5
Range of housing types and sizes (houses, terraces, flats; number of bedrooms etc.)	6.9
	7.2
	7.2

### MANAGEMENT AND SAFETY

Relates to the management of an area and its users.

PLACE ATTRIBUTE	SCORES
Evidence of Council/government management (signage, street cleaners etc.)	4.9
	6.0
	6.2
General condition of housing and other private buildings	7.2
	7.4
	7.3
General condition of private open space (verges, driveways etc.)	6.3
	6.9
	6.9
General condition of public open space (street trees, footpaths, parks etc.)	5.6
	6.5
	6.6
Sense of neighbourhood safety (from crime, traffic, pollution etc.)	7.0
	7.1
	6.9
Sense of personal safety (for all ages, genders, day or night)	7.3
	7.5
	7.4

**LEGEND**  
■ Your LGA  
■ State  
■ Australia

## Shoalhaven - Performance by Attribute

### New South Wales

#### MOVEMENT

Relates to the movement of people and goods.

PLACE ATTRIBUTE	SCORES
Access and safety of walking, cycling and/or public transport (signage, paths, lighting etc.)	5.6
	6.6
	6.7
Connectivity (proximity to other neighbourhoods, employment centres, shops etc.)	6.7
	7.6
	7.6
Ease of driving and parking	7.1
	6.8
	7.0
Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)	5.7
	6.7
	6.9

#### OPEN SPACE

Relates to open space, both public and private, and its features.

PLACE ATTRIBUTE	SCORES
Amount of public space (footpaths, verges, parks etc.)	5.9
	6.9
	7.1
Free places to sit comfortably by yourself or in small groups	6.9
	7.0
	7.1
Physical comfort (including noise, smells, temperature etc.)	7.6
	7.4
	7.4
Quality of public space (footpaths, verges, parks etc.)	5.4
	6.4
	6.6
Spaces for group or community activities and/or gatherings (sports, picnics, performances etc.)	6.4
	6.8
	6.9
Spaces suitable for play (from toddlers to teens)	5.9
	6.5
	6.5

#### SOCIAL FACILITIES AND SERVICES

Relates to infrastructure and programs that support community development and health.

PLACE ATTRIBUTE	SCORES
Access to shared community and commercial assets (library, bike/car share, sport facilities/gyms etc.)	5.6
	6.7
	6.7
Child services (child care, early learning, after school care, medical etc.)	5.5
	6.4
	6.4
Family and community services (aged, disability and home care, protection and support services etc.)	5.8
	6.1
	6.2
Local education options (from elementary to adult education)	5.6
	6.6
	6.6

**LEGEND**  
■ Your LGA  
■ State  
■ Australia





SHOALHAVEN CITY COUNCIL

AUSTRALIAN LIVEABILITY CENSUS  
2023 STRATEGIC PERFORMANCE REPORT

SHOALHAVEN 2032  
COMMUNITY STRATEGIC PLAN

22 SEPTEMBER 2023  
V.2.0



Cover Image: Shoalhaven River Festival,  
Howard Mitchell

This document is has been designed to  
be printed at A4 landscape.

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Final V2.0  
22 September 2023

*We pay our respects to the traditional owners of this land, the Jerrinja, Wandj, Wandian, Wodi Wodi, Yuin, Bhermerri, Tomikin, Murramarang and Budawang people. We extend our respect to their Elders past and present and acknowledge the continued rich culture and heritage of all Aboriginal people on this land.*

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**“WE WILL WORK TOGETHER IN SHOALHAVEN  
TO FOSTER A SAFE & ATTRACTIVE COMMUNITY  
FOR PEOPLE TO LIVE, WORK, STAY & PLAY;  
WHERE SUSTAINABLE GROWTH, DEVELOPMENT &  
ENVIRONMENTAL PROTECTION ARE MANAGED TO  
PROVIDE A UNIQUE & RELAXED LIFESTYLE.”**

SHOALHAVEN 2032 GSP

South Coast, Dee Kramer

## INTRODUCTION

Shoalhaven City Council joined the 2023 Australian Liveability Census as a Strategic Partner to collect neighbourhood values, performance data and community ideas from local residents. The results have been used to deliver this document, the Australian Liveability Census - 2023 Strategic Performance Report, which seeks to measure the performance of liveability related aspects of the Shoalhaven 2032 Community Strategic Plan.

### ABOUT THE PROJECT

Shoalhaven City Council engaged Place Score to deliver the 2023 Australian Liveability Census (LC23). As a Strategic Partner, the metrics within the Census were aligned to Values within the Shoalhaven 2032 Community Strategic Plan (CSP) to help measure the delivery of certain aspects of the CSP, and assist with data-driven decision making, evidence-based planning and policy development based on the needs and priorities of the community.

### PROJECT AIMS

- Build an evidence base for investment
- Provide community liveability metrics aligned to the Themes and Priorities of the Community Strategic Plan
- Deliver a Strategic Performance Report that will support Council decision making in improving community liveability outcomes
- Provide community engagement and resulting evidence base to support the upcoming Community Strategic Plan review
- Obtain a representative sample that has a demographic and spatial mix across the LGA and ability to benchmark Council performance against other areas (New South Wales / Australia)

### THE PROCESS

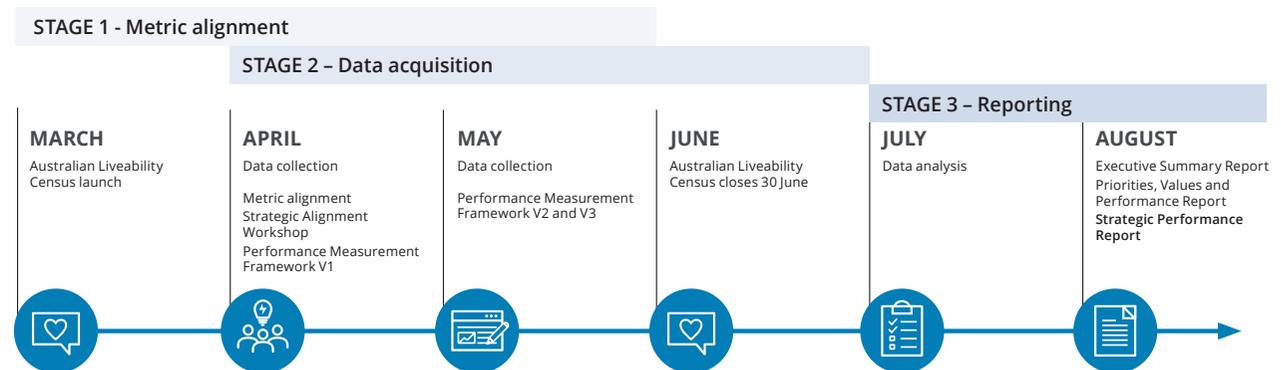
This project has been delivered in three stages. These stages and the key deliverables are outlined in the diagram below.

Stage 1 focused on the metric alignment process, which aligned Place Score attributes against the Community Strategic Plan in order to measure community outcomes. Stage 2 involved the collection of liveability data from the community via Place Score's 2023 Australian Liveability Census. Lastly, Stage 3 included analysis of liveability data to deliver three reports, of which this report is one.

### ABOUT THIS DOCUMENT

The 2023 Strategic Performance Report aligns the results of the LC23 with the Themes included in the Community Strategic Plan to measure Council's success based on community sentiment. This is the third and final document produced from the results of the LC23 for the Shoalhaven Local Government Area (LGA). Additional reports include:

- Executive Summary Report
- Priorities, Values and Performance Report



The three-stage process to develop the Strategic Performance Report

## METHODOLOGY

Place Score used liveability data collected from residents of Shoalhaven during the 2023 Australian Liveability Census to measure the performance of the Shoalhaven 2032 Community Strategic Plan. Place Score's 50 Place attributes have been aligned with three of the Themes in the Community Strategic Plan. The community performance rankings are aggregated to provide scores for each Theme, as well as strengths and priorities for future reviews.

### SOCIAL RESEARCH DATA

Social research is used to learn about people and communities to better deliver products. Evidenced-based investment decisions help to build trust and accountability in organisations, particularly those that are responsible for managing public funds. Place-based social research uses data collected from people about a place.

Over time, longitudinal studies can provide the essential data needed to measure community outcomes or the social impact of infrastructure investment.

Social research can be quantitative (numeric) providing numbers or percentages of people who value a certain place attribute for example; or it can be qualitative, providing insights directly from community members about the changes they would like to see in their environment.

Historically, demographic data has been the key tool for planners, who use population forecasts to define requirements for neighbourhood design and service provision. Social research like Australian Liveability Census reflects the Australian school curriculum definition of liveability as 'an assessment of what it's like to live in a place.' It gives a voice to the community about their values, how neighbourhoods are performing for them and their ideas for improvements that will make a difference to them.

### PLACE SCORE LIVEABILITY DATA

Every two years, Place Score facilitates a national research project: the Australian Liveability Census. The objective of the study is to understand the values of local communities regarding ideal neighbourhoods, capture the performance of neighbourhoods from the perspective of residents, and define priorities for future investment.

Shoalhaven City Council, as a Strategic Partner, will use the results of the LC23 in their policy development based on the need and priorities of the community. As the Council's data is collected as part of a national study, the liveability performance of the LGA will also be benchmarked against state and national averages. This provides the foundation to track changes over time.

### MEASURING COUNCIL'S STRATEGY USING LIVEABILITY DATA

In order to measure Council's Community Strategic Plan, Place Score and Council determined how liveability data should be categorised into the Themes in CSP.

Place Score undertook a policy review to understand the strategic context of the Community Strategic Plan, its Themes and priorities. Through this, Place Score identified a preliminary alignment of metrics in the Performance Measurement Framework V1.

The findings from the Performance Measurement Framework V1 were discussed at a Strategic Alignment Workshop held on 27 April 2023. This workshop was held online with participants from Shoalhaven City Council and Place Score. The intended outcomes of the workshop were to review and confirm liveability metric alignment to the Themes. These were finalised in Performance Measurement Framework V3.

**Social research like the Australian Liveability Census reflects the definition of liveability as 'an assessment of what it's like to live in a place.'**

(Australian school curriculum)

# THE SHOALHAVEN 2032 COMMUNITY STRATEGIC PLAN

Place Score has aligned the Liveability Census' results against the Themes set out in the Shoalhaven 2032 Community Strategic Plan.

## STRATEGY OVERVIEW

A Community Strategic Plan is a legislative requirement of all local councils in New South Wales, and is the primary strategic document for any LGA. Community Strategic Plans define the overall strategic direction and standards for the entire organisation. It is an agreed-upon blueprint to guide Council decision-making for a five-year period, creating a framework for the development and implementation of all other plans and policies. It outlines key strategic issues and projects Council will advocate for on behalf of the community.

The Shoalhaven 2032 Community Strategic Plan was adopted in 2022 and is a review and update of the Shoalhaven 2027 Community Strategic Plan. It was developed closely with the community through comprehensive engagement.

The Community Strategic Plan emphasises the importance of partnerships in achieving the outcomes the community wants.

## COUNCIL'S THEMES

The vision set out by Shoalhaven City Council is:

**"We will work together in Shoalhaven to foster a safe & attractive community for people to live, work, stay & play; where sustainable growth, development & environmental protection are managed to provide a unique & relaxed lifestyle."**

To achieve its vision, Council has set out four Themes for the Shoalhaven Local Government Area:

- 1. Resilient, Safe, Accessible and Inclusive Communities**
- 2. Sustainable, Liveable Environments**
- 3. Thriving Local Economies that meet community needs**
- 4. Effective, Responsible and Authentic Leadership**



Shoalhaven 2032 Community Strategic Plan structure

## ALIGNMENT SUMMARY

This page summarises how each of the 50 Place Score liveability metrics are aligned against each of the Themes in the Community Strategic Plan.

### PERFORMANCE MEASUREMENT FRAMEWORK

The Performance Measurement Framework is a process document for delivering this Strategic Performance Report. The Framework sets out the methodology and rationale.

The Framework provides:

- An overview of the Place Score methodology and resulting data.
- A summary of Council's selected plan: the Shoalhaven 2032 Community Strategic Plan and its Themes.
- Metric alignment process and agreed metrics for each Theme.

### 'OUTWARD' AND 'INWARD' THEMES

Council's Themes have been separated into two categories.

**Outward-facing** Themes are ones that affect the day-to-day lives of local residents. There are three outward-facing Themes:

- Resilient, Safe, Accessible & Inclusive Communities
- Sustainable, Liveable Environments
- Thriving Local Economies that meet community needs

Due to the nature of the data in the 2023 Australian Liveability Census, Place Score is able to align liveability metrics to the Themes which measure community satisfaction, i.e. outward-facing Themes.

**Inward-facing** Themes are focused on the performance of Council. There is one inward facing Theme:

- Effective, Responsible & Authentic Leadership

There are no appropriate liveability metrics to measure inward-facing themes; therefore it has not been included in this study. However, this document in itself is a reflection of Council's commitment to a shared decision-making process by engaging the community and embedding their voice within decision-making.

The table opposite summarises the intent of each of Council's Values and the number of metrics aligned with each. The full list of metrics against each Value can be found in the Performance Measurement Framework V3 (p.16-20).

THEMES	ALIGNMENT BRIEF	METRICS (/50)
<b>Resilient, Safe, Accessible &amp; Inclusive Communities</b>	Community activity Safety Community and disability services Welcoming to all people Active transport	<b>18</b>
<b>Sustainable, Liveable Environments</b>	Sustainable Design and behaviours Community involvement Condition of public infrastructure	<b>12</b>
<b>Thriving Local Economies that meet community needs</b>	Diverse economy Local entrepreneurship and business Inclusive employment High quality public spaces	<b>13</b>
<b>Effective, Responsible &amp; Authentic Leadership</b>	Quality of Council services Community satisfaction with Council services Community engagement	<b>NA</b>
<b>Unaligned</b>	These metrics do not clearly align with any of the themes of priorities defined in CSP	<b>7</b>

Shoalhaven 2032 Community Strategic Plan Themes

## OUR DATA

Place Score's 2023 Australian Liveability Census asked local people about the places they know best, in order to support Council in prioritising community benefit in its planning decisions.

Note:

\* Due to the small sample size, findings derived from the results are indicative only.

Liveability is something that we all want to achieve for our communities, but historically it has been difficult to measure and track. Liveability measurement has relied on secondary data such as health, crime and service locations, or external liveability rankings, but none of these capture what it is actually like for a community to live in a neighbourhood.

The 2023 Australian Liveability Census gathered information on the people's experience of living in their neighbourhoods. The results reveal what really matters to local communities and their priorities and ideas for making their neighbourhoods better for them.

There are four categories of results:

### 1. COMMUNITY VALUES

This community values data (also known as CF) indicates what people value most in their ideal neighbourhood. 50 neighbourhood Place Attributes are ranked according to the percentage of people who value them in their ideal neighbourhood. Council can use these results to understand what is most important to the community. This data also reveals where the community is in agreement as well as possible areas of conflict.

### 2. PLACE EXPERIENCE

Place Experience (also known as PX or performance) reveals how people rate the lived experience of their current suburb of residence. Participants rated the performance of the same 50 Place Attributes between 'Perfect' and 'Fail'. These translate to a score between 0 and 10 for each attribute. Council can use these results to understand the attributes that are contributing most to liveability and which are detracting from community satisfaction.

### 3. STRENGTHS AND PRIORITIES

Strengths are those Place Attributes that are highly valued by your community and positively rated. Priorities are those attributes that are highly valued but performing poorly. Council can use these results to prioritise investment in those areas that will impact most people.

### 4. COMMUNITY IDEAS

All respondents were also invited to share what would make their neighbourhood a better place for them to live in. These qualitative responses provide a wealth of local expertise to guide action in liveability improvements.

### SAMPLES AND CONFIDENCE LEVELS

The results in this report have not been weighted. Unless noted otherwise, a 95% confidence level can be expected for all results at the LGA level, with a margin of error of  $\pm 3.6\%$  for CF data, and  $\pm 1.8$  pts for PX data. The tables below show the sample sizes for community values and Place Experience results.

Shoalhaven LGA		
CF	711	95% $\pm$ 3.6%
PX	681	95% $\pm$ 1.8 pts

### BREAKDOWN BY GENDER

	Female	Male	Other
CF	474	220	17*
PX	451	213	17*

### BREAKDOWN BY AGE

	U25	25-44	45-64	O64
CF	100	147	278	186
PX	93	137	274	177

## EXECUTIVE SUMMARY



## IMPROVING LIVEABILITY IN SHOALHAVEN

This page provides a snapshot of the key findings for the Shoalhaven LGA. Overall, liveability in Shoalhaven is rated lower than the state average. Opportunities to enhance liveability should focus on protecting our unique natural landscape while delivering walkable communities, with well maintained open spaces, close to shared amenities. Investment in the Sustainable, Liveable Environments Theme will lead to the best outcomes for the community.

Liveability in Shoalhaven is performing slightly lower than the state and national average with a PX score of 64 compared to 67 for the whole country and NSW, with a community satisfaction score of 77%.

*Elements of the natural environment* is the most important liveability attribute for the Shoalhaven community (valued by 77% of the community) and contributes the most to local liveability (PX8.3).

### PERFORMANCE OF THE CSP THEMES

The average performance of metrics associated with the three CSP Themes perform are lower than the state average; scoring between PX6.6 and PX6.0.

- Resilient, Safe, Accessible and Inclusive Communities is two points below the state average (PX6.6 vs PX6.8 for NSW)
- Sustainable, Liveable Environments is rated four points below the state average (PX6.2 vs PX6.6 for NSW)
- Thriving Local Economies that meet community needs is performing the lowest compared to the state average (PX6.0 vs PX6.7 for NSW)

### STRATEGIC IMPROVEMENT DIRECTIONS

Investment to improve community outcomes associated with the CSP Themes should be prioritised in the following order:

#### 1. Sustainable, Liveable Environments

Protect nature and invest in local walking and cycling paths, connecting them to the wider network and neighbourhood amenity.

#### 2. Thriving Local Economies that meet community needs

Ensure streetscapes and public spaces are safe and well maintained, and that housing is co-located with retail and amenity.

#### 3. Resilient, Safe, Accessible and Inclusive Communities

Build on strong community connections to enhance neighbourhood safety.

The metric with the highest overall priority and therefore the most opportunity for improved liveability outcomes is *General condition of public open space (street trees, footpaths, parks etc.)*.

"I would love for the council to try to make more footpaths, bike paths, parks, and playgrounds around the area that is possible of linking up."

M, U25, NOWRA HILLS



"More footpaths, better maintenance of reserves and open spaces. More pride by the Council in the overall look of public spaces."

F, 45-64, MOLLYMOOK BEACH



### PRIORITIES FOR DIFFERENT DEMOGRAPHICS

Everyone experiences their place uniquely, therefore different groups are impacted differently by local liveability. Women and those aged 25-64 have more investment priorities than the average while youth have different priorities all together.



**WOMEN** are the least satisfied and would benefit from improved public spaces, protection of natural environment, and safer and better connectivity to neighbourhood amenities. They also value metrics associated with natural environment and landscaping.

### LEAST SATISFIED AGE GROUP 45-64 year olds

While 45-64 year olds give Shoalhaven a PX score of 61, they have the most number of metrics that are highly valued but not performing well. Protection of natural environment is an additional priority for this group.

### 25-44 year olds

25-44 year olds are rating liveability in the Shoalhaven 6% lower than the average PX score at 58. This reflects a wider trend of lower liveability performance for this age group, who tend to be workers and young families. This group have similar priorities to 45-64 year olds.

### 43% COMMUNITY IDEAS

The majority of ideas for neighbourhood improvement were related to **Movement** with the majority coming from the **45-64 year olds**. The key focus for this group is improving local pedestrian and bike paths connecting homes with amenities such as beaches, shops and parks, and maintenance of the public spaces.

## IMPROVING LIVEABILITY IN SHOALHAVEN

The following recommendations indicate opportunities to improve community outcomes regarding liveability aligned with each of the Themes identified in the CSP. They identify where Council should focus attention in order to protect and build on current strengths. They also show where we should invest to improve those attributes that are highly valued but are under performing from the perspective of the local community.

### LIVEABILITY RECOMMENDATIONS

Liveability recommendations are determined by comparing our community's values with liveability performance. Attributes that are valued by many in our community and performing well should be nurtured. Conversely, improving highly valued but poorly performing attributes will maximise community benefit.

### HOW DO WE MEET THE KEY THEMES?

The following graphic summarise the metrics in each Theme which, from the community's point of view, should be prioritised to improve the performance associated with the Key Themes.

These results show that the performance of the Pillars is spread between PX6.0 and PX6.6. Thriving Local Economies that meet community needs is the lowest performing Theme at PX6.0. Improvement should focus primarily on outcomes in this Theme, followed by Sustainable, Liveable Environments Theme.

Theme priorities are different for different groups within the LGA. Women, other genders, and 25-64 year olds would benefit most from investments in all the three Themes.

A full breakdown of priorities by Themes can be found on p.16.



### RESILIENT, SAFE, ACCESSIBLE & INCLUSIVE COMMUNITIES

This Theme has an average score of **6.6/10**.

To improve the outcomes in this Theme, consider initiatives that would improve the performance of the following metric:

- *Sense of neighbourhood safety (from crime, traffic, pollution etc.)*

To maintain the strengths in this Theme, the Council should protect and nurture the following metrics:

- *Sense of personal safety (for all ages, genders, day or night)*
- *Sense of belonging in the community*



### SUSTAINABLE, LIVEABLE ENVIRONMENTS

This Theme has an average score of **6.2/10**.

To improve the outcomes in this theme, consider initiatives that would improve the performance of the following metrics:

- *Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)*
- *Access and safety of walking, cycling and/or public transport (signage, paths, lighting etc.)*
- *Protection of the natural environment*
- *Landscaping and natural elements (street trees, planting, water features etc.)*

To maintain the strengths in this Theme, the Council should protect and nurture the following metrics:

- *Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)*



### THRIVING LOCAL ECONOMIES THAT MEET COMMUNITY NEEDS

This Theme has an average score of **6/10**.

To improve the outcomes in this Theme, consider initiatives that would improve the performance of the following metrics:

- *General condition of public open space (street trees, footpaths, parks etc.)*
- *Quality of public space (footpaths, verges, parks etc.)*
- *Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)*

To maintain the strengths in this Theme, the Council should protect and nurture the following metrics:

- *Local businesses that provide for daily needs (grocery stores, pharmacy, banks etc.)*
- *Locally owned and operated businesses*

## WHAT'S IMPORTANT TO OUR COMMUNITY?

The 2023 Australian Liveability Census asks respondents to select the 15 attributes that most important to them in their ideal neighbourhood out of a list of 50. The results reveal shared values - what most people care about. The higher the percentage, the more aligned the community is. This data can be used to review the CSP to assure strategic Themes align with community liveability values.

### INTEGRATING COMMUNITY VALUES INTO STRATEGIC PLANNING

Understanding what the community values related to liveability is an important tool to help develop strategic plans. This information can also be tracked over time, allowing Council to evolve strategic planning goals and objectives.

The table opposite shows the 15 metrics that were selected as most important and the percentage of the community that values them.

Overall, the Shoalhaven community values the natural environment and is most strongly aligned around public open space - both its presence and its maintenance.

However, different demographic groups value different things. For example, more people aged over 65 value *Evidence of community activity* (48% compared to 33% on average) and *Neighbourhood spirit/resilience* (33% vs 23%). More people under 25 value *Spaces suitable for specific activities or special interests* (44% vs 36%), *Connectivity* (38% vs 29%) and *Things to do in the evening* (38% vs 29%)

These variations in results indicate that there are some misalignment in values across different demographic groups.

2023 CF RANK #	COMMUNITY VALUES	LGA	NSW
1	Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)	77%	72%
2	General condition of public open space (street trees, footpaths, parks etc.)	59%	66%
3	Sense of neighbourhood safety (from crime, traffic, pollution etc.)	56%	51%
4	Protection of the natural environment	53%	47%
5	Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)	50%	51%
=#6	Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)	49%	56%
=#6	Sense of belonging in the community	49%	42%
=#8	Local businesses that provide for daily needs (grocery stores, pharmacy, banks etc.)	48%	52%
=#8	Sense of personal safety (for all ages, genders, day or night)	48%	50%
10	Landscaping and natural elements (street trees, planting, water features etc.)	47%	46%
11	Locally owned and operated businesses	44%	40%
12	Quality of public space (footpaths, verges, parks etc.)	43%	45%
13	Access and safety of walking, cycling and/or public transport (signage, paths, lighting etc.)	41%	46%
=#14	Physical comfort (including noise, smells, temperature etc.)	36%	31%
=#14	Spaces suitable for specific activities or special interests (entertainment, exercise, dog park, BBQs etc.)	36%	34%

Notes:

1. The =# prefix is used when multiple Place Attributes share the same Care Factor rank.

2. The Top 15 CF table shows the Place Attributes which are most highly valued by your community, listed from most to least valued. Since the average CF% is 30%, all attributes in the table are noteworthy.

### RECOMMENDATIONS FOR THE NEXT CSP REVIEW

The three Themes appear to each reflect a mixture of the top liveability values, as well as a good mixture of strengths and opportunities for future investments.

The highest liveability value not aligned with a current theme is *'Overall visual character of the neighbourhood'* ranked at #16. This metric could be considered for alignment with one of the Themes in a future CSP.

Further community engagement should focus on topics where there is less alignment regarding importance, or where there is conflict between groups eg.

- *Sense of neighbourhood safety (from crime, traffic, pollution etc.):* 45% of under 25s compared to 60% of 45-64 year olds

Or on metrics where performance differs significantly between groups eg.

- *Things to do in the evening:* PX3.1 for 25-44 year olds compared to PX4.6 for over 64 year olds

## COMPARATIVE PERFORMANCE

Understanding the LGA's strengths and weaknesses compared to Place Score's National and State Benchmarks can help you plan to build on competitive advantages or improve areas that are under performing.

### BASELINE PERFORMANCE

This chart illustrates Shoalhaven LGA's results compared to data from New South Wales and Australia.

Overall, Shoalhaven City Council's liveability performance is rated lower by the community, than NSW and Australia.

Compared to NSW and Australia, Shoalhaven performs almost on par in Resilient, Safe, Accessible and Inclusive Communities Theme, achieving a score of PX6.6 compared to PX6.8.

The more significant difference in the LGA's comparative performance is in Thriving Local Economies that meet community needs Theme, where it scores PX6.0 compared to PX6.6 in NSW and PX6.7 in Australia.

These results indicate that, while the LGA performs lower than the rest of the country and state, there is room for improvement to further build on the LGA's strengths to develop a competitive advantage.



Notes:

For clarity, the following abbreviated Theme names are used:

Resilient - Resilient, Safe, Accessible & Inclusive Communities

Sustainable - Sustainable, Liveable Environments

Thriving - Thriving Local Economies that meet community needs

Unaligned - Metrics not aligned to a Theme

## 2023 COMMUNITY LIVEABILITY PRIORITIES

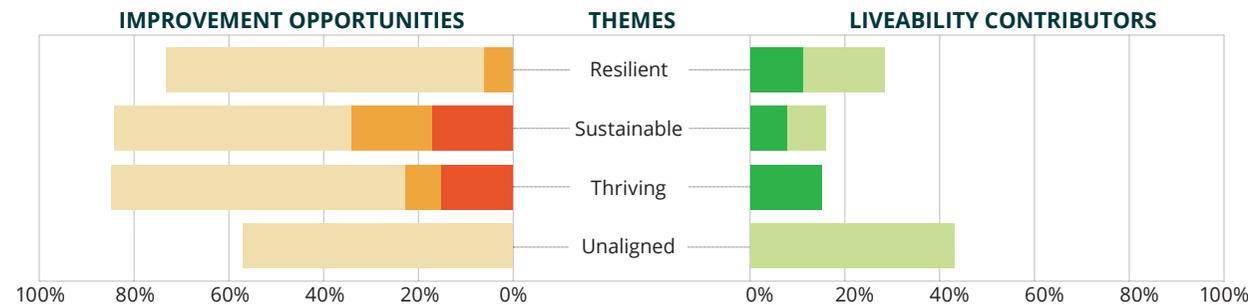


# COMMUNITY PRIORITIES - STRATEGIC THEMES SUMMARY

This section identifies community liveability priorities for each of the Themes included in the Shoalhaven 2032 Community Strategic Plan. The level of priority is based on the gap between how the community values a specific attribute, and its average performance across the LGA. Over time, the aim is to increase the number of highly performing and highly valued metrics (Nurture) and reduce the number of areas requiring improvement (Prioritise and Manage).

## PRIORITY SNAPSHOT

This chart captures the number of attributes in each Theme that are under/over performing from the community's perspective. It reveals that there is opportunity to increase liveability by directing the future investment into the Sustainable, Liveable Environments, and Thriving Local Economies that meet community needs Themes.



Notes:  
 For clarity, the following abbreviated Theme names are used:  
 Resilient - Resilient, Safe, Accessible & Inclusive Communities  
 Sustainable - Sustainable, Liveable Environments  
 Thriving - Thriving Local Economies that meet community needs  
 Unaligned - Metrics not aligned to a Theme

## UNDERSTANDING COMMUNITY PRIORITIES

This table explains the priority level for attributes in each of the Community Strategic Plan Themes:

<b>Nurture</b> CF ≥ 40% PX ≥ 7	These attributes are both valued by a significant proportion of the community and rated most highly for performance. These are the strongest contributors to local liveability. They should be strengthened and protected.
<b>Prioritise</b> CF ≥ 40% PX < 6	These attributes are highly valued by the community but rated poorly. Increasing the performance of these attributes will deliver the biggest benefit to the community.
<b>Manage</b> CF ≥ 40% 6 ≤ PX < 7	These attributes are valued by the community but not performing as well as they could. Increasing investments in these attributes can make them great contributors to local liveability, or maintain the current level of investment to prevent future problems.
<b>Monitor</b> CF < 40% PX ≥ 7	These attributes are rated well and are among the top performers, but not highly valued compared to other attributes. Monitoring performance of these attributes will ensure they do not become something we need to manage in the future.
<b>Maintain</b> CF < 40% PX < 7	These attributes are rated the lowest and are potential threats, but not the most valued. If values change, these attributes can move up to 'Prioritise'. Engage with stakeholders to future-proof or de-risk these attributes.

**COMMUNITY PRIORITIES**

This table lists the priority level for each metric in this Theme. These results are for the LGA average. Nurturing the strengths and investing in metrics identified as Prioritise and Manage will improve liveability for the community.

**RESILIENT, SAFE, ACCESSIBLE & INCLUSIVE COMMUNITIES**

This Theme has an average score of **6.6/10**.

To improve the outcomes in this Theme, consider initiatives that would improve the performance of the following metrics:

- Sense of neighbourhood safety (from crime, traffic, pollution etc.)

Compared to the LGA average, the performance of this Theme is specifically under performing for the following group/s:

- Women (PX6.4)
- Other genders (PX5.2)
- 25-44 year olds (PX6.1)
- 45-64 year olds (PX6.4)

Nurture	CF ≥ 40% and PX ≥ 7
Prioritise	CF ≥ 40% and PX < 6
Manage	CF ≥ 40% and 6 ≤ PX < 7
Maintain	CF < 40% and PX < 7
Monitor	CF < 40% and PX ≥ 7



**RESILIENT, SAFE, ACCESSIBLE & INCLUSIVE COMMUNITIES**

Place Score Metric	Priority level	Score /10
Sense of personal safety (for all ages, genders, day or night)	Nurture	7.3
Sense of belonging in the community	Nurture	7.4
Sense of neighbourhood safety (from crime, traffic, pollution etc.)	Manage	7.0
Spaces suitable for specific activities or special interests (entertainment, exercise, dog park, BBQs etc.)	Maintain	6.3
Evidence of community activity (volunteering, gardening, art, community-organised events etc.)	Maintain	6.5
Local history, historic buildings or features	Maintain	5.5
Spaces for group or community activities and/or gatherings (sports, picnics, performances etc.)	Maintain	6.4
Sense of connection to/feeling support from neighbours or community	Maintain	7.0
Spaces suitable for play (from toddlers to teens)	Maintain	5.9
Cultural and/or artistic community	Maintain	6.0
Family and community services (aged, disability and home care, protection and support services etc.)	Maintain	5.8
Mix or diversity of people in the area	Maintain	6.6
Local education options (from elementary to adult education)	Maintain	5.6
Child services (child care, early learning, after school care, medical etc.)	Maintain	5.5
Local community groups and organisations	Maintain	6.8
Welcoming to all people	Monitor	7.7
Neighbourhood spirit/resilience (from external impacts, storms, economic downturns etc.)	Monitor	7.3
There are people like me (age, gender, interests, ethnic backgrounds etc.)	Monitor	7.6

**COMMUNITY PRIORITIES**

This table lists the priority level for each metric in this Theme. These results are for the LGA average. Nurturing the strengths and investing in metrics identified as Prioritise and Manage will improve liveability for the community.

**SUSTAINABLE, LIVEABLE ENVIRONMENTS**

This Theme has an average score of 6.2/10.

To improve the outcomes in this Theme, consider initiatives that would improve the performance of the following metrics:

- *Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)*
- *Access and safety of walking, cycling and/or public transport*
- *Protection of the natural environment*
- *Landscaping and natural elements*

Compared to the LGA average, the performance of this Theme is specifically under performing for the following group/s:

- *Women (PX6.0)*
- *Other genders (PX5.4)*
- *25-44 year olds (PX5.8)*
- *45-64 year olds (PX5.9)*

Nurture	CF ≥ 40% and PX ≥ 7
Prioritise	CF ≥ 40% and PX < 6
Manage	CF ≥ 40% and 6 ≤ PX < 7
Maintain	CF < 40% and PX < 7
Monitor	CF < 40% and PX ≥ 7



**SUSTAINABLE, LIVEABLE ENVIRONMENTS**

Place Score Metric	Priority level	Score /10
Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)	Nurture	8.3
Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)	Prioritise	5.7
Access and safety of walking, cycling and/or public transport (signage, paths, lighting etc.)	Prioritise	5.6
Protection of the natural environment	Manage	6.3
Landscaping and natural elements (street trees, planting, water features etc.)	Manage	6.7
Evidence of recent public investment (roads, parks, schools etc.)	Maintain	4.3
Sustainable urban design (water sensitive design, transport-oriented design, sustainable building design, density etc.)	Maintain	5.1
Sustainable behaviours in the community (water management, solar panels, recycling etc.)	Maintain	6.4
Range of housing prices and tenures (low to high \$, buy or rent etc.)	Maintain	5.1
Quality of buildings (design and construction of homes, shops, schools etc.)	Maintain	6.8
Range of housing types and sizes (houses, terraces, flats; number of bedrooms etc.)	Maintain	6.9
Physical comfort (including noise, smells, temperature etc.)	Monitor	7.6

**COMMUNITY PRIORITIES**

This table lists the priority level for each metric in this Theme. These results are for the LGA average. Nurturing the strengths and investing in metrics identified as Prioritise and Manage will improve liveability for the community.

**THRIVING LOCAL ECONOMIES THAT MEET COMMUNITY NEEDS**

This Theme has an average score of **6.0/10**.

To improve the outcomes in this Theme, consider initiatives that would improve the performance of the following metrics:

- *General condition of public open space (street trees, footpaths, parks etc.)*
- *Quality of public space (footpaths, verges, parks etc.)*
- *Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)*

Compared to the LGA average, the performance of this Theme is specifically under performing for the following group/s:

- *Women (PX5.8)*
- *Other genders (PX5.0)*
- *25-44 year olds (PX5.6)*
- *45-64 year olds (PX5.7)*

Nurture	CF ≥ 40% and PX ≥ 7
Prioritise	CF ≥ 40% and PX < 6
Manage	CF ≥ 40% and 6 ≤ PX < 7
Maintain	CF < 40% and PX < 7
Monitor	CF < 40% and PX ≥ 7



**THRIVING LOCAL ECONOMIES THAT MEET COMMUNITY NEEDS**

Place Score Metric	Priority level	Score /10
Local businesses that provide for daily needs (grocery stores, pharmacy, banks etc.)	Nurture	7.0
Locally owned and operated businesses	Nurture	7.2
General condition of public open space (street trees, footpaths, parks etc.)	Prioritise	5.6
Quality of public space (footpaths, verges, parks etc.)	Prioritise	5.4
Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)	Manage	6.8
Things to do in the evening (bars, dining, cinema, live music etc.)	Maintain	4.3
Local employment opportunities (within easy commute)	Maintain	5.0
Amount of public space (footpaths, verges, parks etc.)	Maintain	5.9
Access to shared community and commercial assets (library, bike/car share, sport facilities/gyms etc.)	Maintain	5.6
Connectivity (proximity to other neighbourhoods, employment centres, shops etc.)	Maintain	6.7
Unusual or unique buildings and/or public space design	Maintain	4.7
Free places to sit comfortably by yourself or in small groups	Maintain	6.9
General condition of private open space (verges, driveways etc.)	Maintain	6.3

**COMMUNITY PRIORITIES**

This table lists the priority level for each metric that has not been aligned to a Theme. These results are for the LGA average. Nurturing the strengths and investing in metrics identified as Prioritise and Manage will improve liveability for the community.

**UNALIGNED METRICS**

This group has an average score of **6.5/10**.

While not specifically aligned to a specific Theme, investing in under performing metrics will improve community outcomes overall.

Consider initiatives that would improve the performance of the following metrics:

- Evidence of Council/government management (signage, street cleaners etc.)
- Sense of character or identity that is different from other neighbourhoods
- Landmarks, special features or meeting places

Compared to the LGA average, the performance of this Theme is specifically under performing for the following group/s:

- Women (PX5.4)
- 25-44 year olds (PX6.2)
- 45-64 year olds (PX6.3)

**UNALIGNED METRICS**

Place Score Metric	Priority level	Score /10
Evidence of Council/government management (signage, street cleaners etc.)	Maintain	4.9
Sense of character or identity that is different from other neighbourhoods	Maintain	6.7
Landmarks, special features or meeting places	Maintain	6.4
Evidence of recent private investment (renovations, landscaping, painting etc.)	Maintain	6.2
Overall visual character of the neighbourhood	Monitor	7.2
Ease of driving and parking	Monitor	7.1
General condition of housing and other private buildings	Monitor	7.2

Nurture	CF ≥ 40% and PX ≥ 7
Prioritise	CF ≥ 40% and PX < 6
Manage	CF ≥ 40% and 6 ≤ PX < 7
Maintain	CF < 40% and PX < 7
Monitor	CF < 40% and PX ≥ 7

## 2023 PERFORMANCE



Nowra CBD Revitalization, Shoalhaven City council

## STRATEGIC THEMES - PERFORMANCE SUMMARY

This section details the liveability performance of each of the Themes included in the Shoalhaven 2032 Community Strategic Plan. This data shows how the community rated the liveability of their neighbourhoods, which aspects are performing the best and which are negatively impacting liveability. Overall, the 25-64 year olds are experiencing liveability at a noticeably lower level than the older and younger members of the community.

### PERFORMANCE SUMMARY

This chart illustrates how each of the Themes are performing across three different geographies and four key age groups.



#### WHAT'S A GOOD SCORE?

- 7 or more: Performing well
- 6 to 7: Room for improvement
- Under 6: Negatively impacting

**PERFORMANCE BY KEY THEME**

This table lists the average performance rating received by each of the metrics associated with this Theme.



**RESILIENT, SAFE, ACCESSIBLE & INCLUSIVE COMMUNITIES**

Metric	Scores
Welcoming to all people	7.7
There are people like me (age, gender, interests, ethnic backgrounds etc.)	7.6
Sense of belonging in the community	7.4
Sense of personal safety (for all ages, genders, day or night)	7.3
Neighbourhood spirit/resilience (from external impacts, storms, economic downturns etc.)	7.3
Sense of neighbourhood safety (from crime, traffic, pollution etc.)	7.0
Sense of connection to/feeling support from neighbours or community	7.0
Local community groups and organisations	6.8
Mix or diversity of people in the area	6.6
Evidence of community activity (volunteering, gardening, art, community-organised events etc.)	6.5
Spaces for group or community activities and/or gatherings (sports, picnics, performances etc.)	6.4
Spaces suitable for specific activities or special interests (entertainment, exercise, dog park, BBQs etc.)	6.3
Cultural and/or artistic community	6.0
Spaces suitable for play (from toddlers to teens)	5.9
Family and community services (aged, disability and home care, protection and support services etc.)	5.8
Local education options (from elementary to adult education)	5.6
Local history, historic buildings or features	5.5
Child services (child care, early learning, after school care, medical etc.)	5.5

**WHAT'S A GOOD SCORE?**

7 or more: Performing well  
6 to 7: Room for improvement  
Under 6: Negatively impacting

**PERFORMANCE BY KEY THEME**

This table lists the average performance rating received by each of the metrics associated with this Theme.



**SUSTAINABLE, LIVEABLE ENVIRONMENTS**

Metric	Scores
Elements of natural environment (natural features, views, vegetation, topography, water, wildlife etc.)	8.3
Physical comfort (including noise, smells, temperature etc.)	7.6
Range of housing types and sizes (houses, terraces, flats; number of bedrooms etc.)	6.9
Quality of buildings (design and construction of homes, shops, schools etc.)	6.8
Landscaping and natural elements (street trees, planting, water features etc.)	6.7
Sustainable behaviours in the community (water management, solar panels, recycling etc.)	6.4
Protection of the natural environment	6.3
Walking/jogging/bike paths that connect housing to communal amenity (shops, parks etc.)	5.7
Access and safety of walking, cycling and/or public transport (signage, paths, lighting etc.)	5.6
Sustainable urban design (water sensitive design, transport-oriented design, sustainable building design, density etc.)	5.1
Range of housing prices and tenures (low to high \$, buy or rent etc.)	5.1
Evidence of recent public investment (roads, parks, schools etc.)	4.3

**WHAT'S A GOOD SCORE?**

- 7 or more: Performing well
- 6 to 7: Room for improvement
- Under 6: Negatively impacting

**PERFORMANCE BY KEY THEME**

This table lists the average performance rating received by each of the metrics associated with this Theme.



**THRIVING LOCAL ECONOMIES THAT MEET COMMUNITY NEEDS**

Metric	Scores
Locally owned and operated businesses	7.2
Local businesses that provide for daily needs (grocery stores, pharmacy, banks etc.)	7.0
Free places to sit comfortably by yourself or in small groups	6.9
Access to neighbourhood amenities (cafes, shops, health and wellness services etc.)	6.8
Connectivity (proximity to other neighbourhoods, employment centres, shops etc.)	6.7
General condition of private open space (verges, driveways etc.)	6.3
Amount of public space (footpaths, verges, parks etc.)	5.9
General condition of public open space (street trees, footpaths, parks etc.)	5.6
Access to shared community and commercial assets (library, bike/car share, sport facilities/gyms etc.)	5.6
Quality of public space (footpaths, verges, parks etc.)	5.4
Local employment opportunities (within easy commute)	5.0
Unusual or unique buildings and/or public space design	4.7
Things to do in the evening (bars, dining, cinema, live music etc.)	4.3

**WHAT'S A GOOD SCORE?**

- 7 or more: Performing well
- 6 to 7: Room for improvement
- Under 6: Negatively impacting

**PERFORMANCE OF UNALIGNED METRICS**

This table lists the average performance rating received by each of the metrics that were not aligned with a Theme.

UNALIGNED	
Metric	Scores
Overall visual character of the neighbourhood	7.2
General condition of housing and other private buildings	7.2
Ease of driving and parking	7.1
Sense of character or identity that is different from other neighbourhoods	6.7
Landmarks, special features or meeting places	6.4
Evidence of recent private investment (renovations, landscaping, painting etc.)	6.2
Evidence of Council/government management (signage, street cleaners etc.)	4.9

**WHAT'S A GOOD SCORE?**

- 7 or more: Performing well
- 6 to 7: Room for improvement
- Under 6: Negatively impacting

## GLOSSARY AND NOTES

### GLOSSARY

**Care Factor (CF):** Place Score's CF data gives you a measure of value. It tells you what is most valuable to the community. Respondents are asked, "Which Place Attributes are most important to you in your ideal neighbourhood or street environment?" under each Place attributes. Respondents select their three most important attributes from each of the Place attributes. Once all responses have been collected, CF is expressed as a percentage indicating the proportion.

**Community Strategic Plan (CSP):** Shoalhaven 2032 Community Strategic Plan

**Council:** Shoalhaven City Council

**Framework:** Reference to the Performance Measurement Framework document

**LC23:** Australian Liveability Census 2023

**LGA:** Local Government Area

**Theme:** Reference to the Themes identified within the Shoalhaven 2032 Community Strategic Plan

**Place Experience (PX):** Place Score's PX Score gives a neighbourhood its place rating. The whole number between 0 and 100 is nationally consistent and enables you to track place experience over time and to compare one place with another.

### NOTES

For further information on the demographics of respondents, please see page 2 of the Executive Summary report, which explains the split of responses received.

For more information on the liveability attributes assigned to each Theme, please see the Performance Measurement Framework V3.

Cover Image - Shoalhaven Aerial View, Daryl Jones



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CL24.44 - Attachment 3