

# Queensland Growth Management Summit 2010

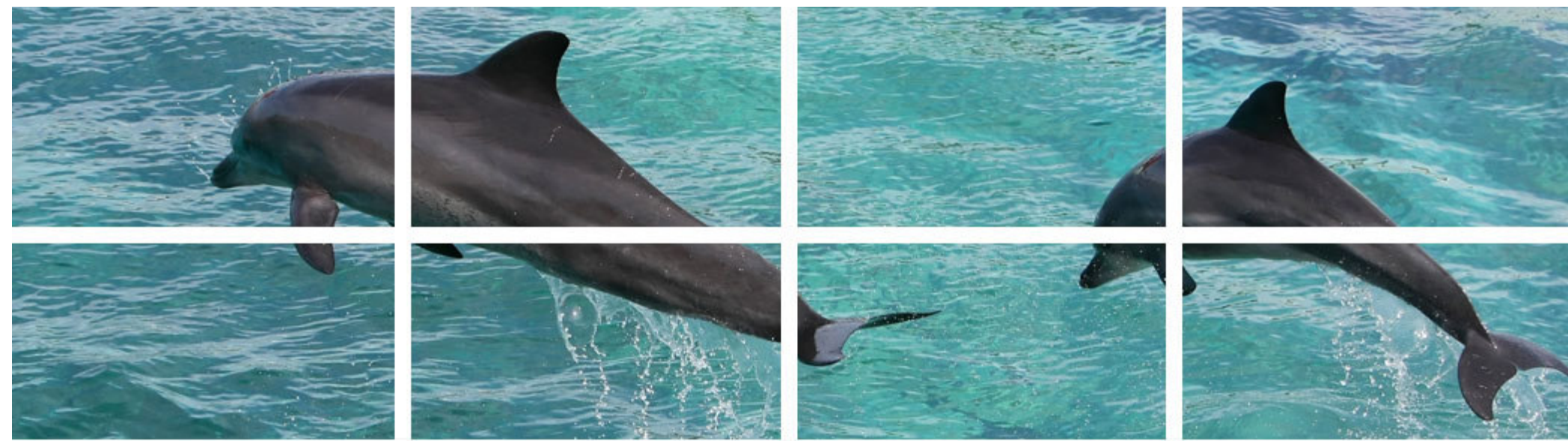
## Social Research on Population Growth and Liveability in South East Queensland

March 2010

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- 81195 : March 2010

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## Research Background, Objectives and Methodology

# Research Background

- With South East Queensland (SEQ) having the fastest growing population in Australia, the Queensland Government has committed to working with industry and the community to address the challenges that come with this growth – liveability and sustainability.
- The South East Queensland Regional Plan 2009-2031 was issued in July 2009 and is the major planning document for South East Queensland aimed at addressing regional growth, change, land use and development. As such it covers a number of important issues associated with growth such as the management of: land supply/use; natural environment; natural resources; transport congestion; infrastructure; employment generation; climate change; and housing affordability.
- Given that South East Queensland's rapid expansion is one of the Queensland Government's biggest challenges, Premier Anna Bligh announced in December 2009 that an advisory team had been assembled to tackle population growth and "protect Queensland's unique way of life". In addition, she announced a Queensland growth management summit will be held in late March 2010.
- In advance of the growth summit, the Department of the Premier and Cabinet wish to gain a benchmark measure of current South East Queensland community attitudes towards population growth and 'liveability' in the region.

# Research Objectives

- The ultimate objective of this research is to understand, from a community perspective, the views on population growth and issues associated with this growth which will feed into planning for the Queensland Growth Management Summit.
- Specifically, the research is required to assist the Department's understanding of the following:
  1. Community knowledge and attitudes towards **population growth** and **liveability** in South East Queensland.
    - Factors making SEQ a preferred place to live
    - Priorities for the community - 'must-haves' which need to be safe-guarded
    - Whether population growth is viewed favourably or unfavourably
    - What is likely to influence these views / what might make their views more positive
    - Community preferences for some liveability options.
  2. The community's **preference(s) for engaging with Government** on population growth i.e. how does the community want to get involved?



# Research Methodology

## Methodology

- Online survey amongst residents of South East Queensland aged 18+ years, using MyOpinions (Australia's largest online panel)

## Sample size, quotas and margin of error

<u>Region</u> <i>(Determined by postcode)</i>	<u>Sample Size (n=)</u>	<u>Margin of error<sup>1</sup></u>
<b>Total</b>	<b>801</b>	<b>±3.5%</b>
Inner Brisbane	199	±6.9%
Outer Brisbane	201	±6.9%
Gold Coast	153	±7.9%
Sunshine Coast	150	±8.0%
West Moreton	98	±9.9%

- Broad quotas set on age and gender

## Weighting

- Data is post weighted by age, gender and location (by postcode) to 2008 population estimates, based on Australian Standard Geographical Classification (ASGC 2006)<sup>2</sup>.

## Fieldwork period

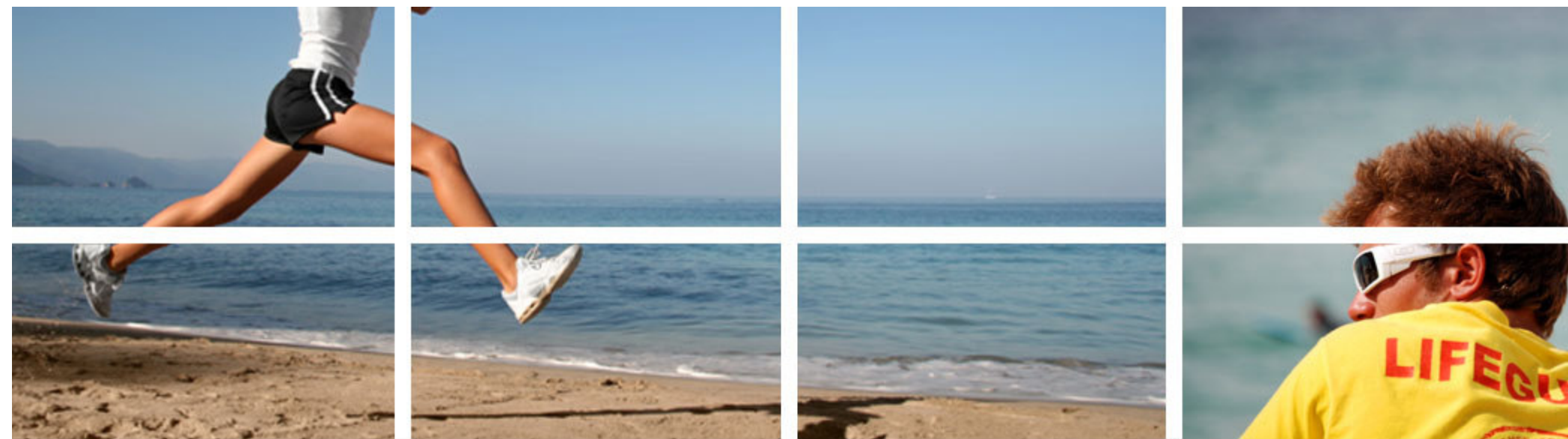
- 17 February - 24 February 2010

## Average interview length

- 16 minutes

<sup>1</sup> At the 95% Confidence Level

<sup>2</sup> Source: Australian Bureau of Statistics, Population Estimates by Age and Sex, Australia and States (Cat. no. 3235.0.55.001). (QRSIS database maintained by the Office of Economic and Statistical Research (OESR)).



# Community Attitudes Towards **Living** in South East Queensland

# Summary of Community Attitudes Towards Living in SEQ

- South East Queenslanders strongly agree that they really enjoy living in the region (mean score of 83.4 out of 100) and rate their quality of life highly (mean score of 78.7 out of 100).
  - Residents of the Sunshine Coast have significantly higher ratings for both enjoyment and quality of life (mean scores of 88.2 and 83.2 respectively).
- It is **'liveability' factors** that top the list of what South East Queensland residents say they value about living here:
  - the weather/warm climate;
  - the lifestyle, in terms of being laid back/relaxing and outdoors focused;
  - the great beaches, and accessibility to these; and
  - the sense of community and friendly people.
- Limiting population growth was raised spontaneously by some residents who said they value the current levels of population and development, and the fact that South East Queensland is currently not 'overcrowded'.
  - ★ *"The population to stay as is. The rates to go no higher."*
  - ★ *"That it's less crowded than most other cities that I've been to around the world."*
  - ★ *"No more increase in the population would be nice. I think we are fairly full at present and it would not enhance our quality of life."*
- While weather, lifestyle and beaches were prominent top of mind mentions, advanced statistical analysis shows that the key values which have the **most impact** on residents' quality of life and enjoyment of life in SEQ are **safety** (both at home and in the community) and **sense of community**.
  - Other strong influences are clean air, ease of getting around, cost of living, education, character of housing, relaxed lifestyle and range of flora and fauna.

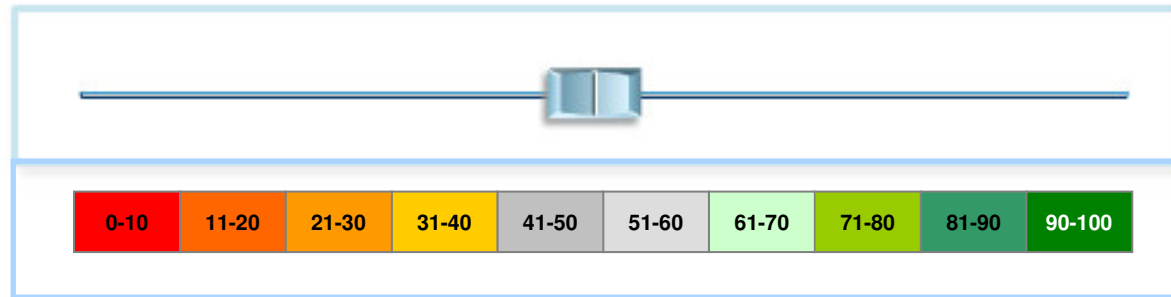


# Quality of Life in SEQ

My quality of life

Very poor  
(0)

Excellent  
(100)



Total Negative (0 - 50)  
8%

Total Positive (51 - 100)  
92%

Mean Score



78.7

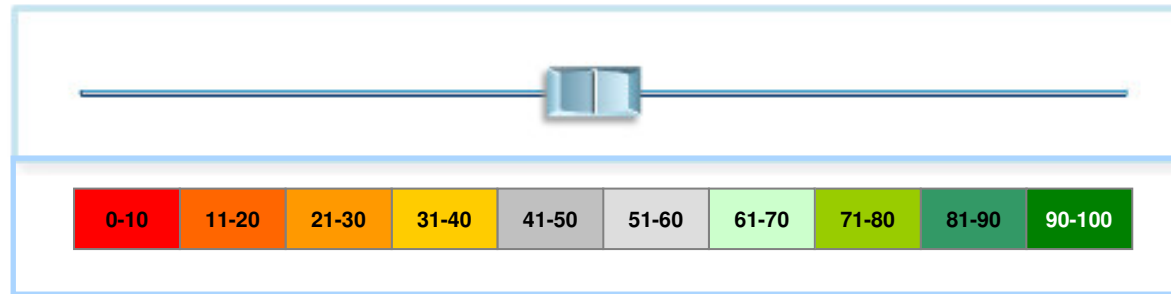
- More than nine in ten South East Queensland residents rate their quality of life positively i.e. a score of 51 or higher out of 100; three-quarters give a rating of 71 or higher.
- The quality of life rating increases as length of time spent in South East Queensland increases:
  - Up to 3 years in SEQ – mean score of 72.8
  - 3-10 years in SEQ – mean score of 76.9
  - 10+ years in SEQ – mean score of 79.7

Inner Brisbane	79.2
Outer Brisbane	77.0
• BCC	79.3
• Greater Bris	74.8
West Moreton	77.1
Gold Coast	80.1
Sunshine Coast	83.2

# Overall Feeling Towards Living in SEQ

I really enjoy living in South East Queensland

Completely disagree  
(0)



Completely agree  
(100)

Total Negative (0 - 50)  
7%

Total Positive (51 - 100)  
93%

Mean Score



83.4

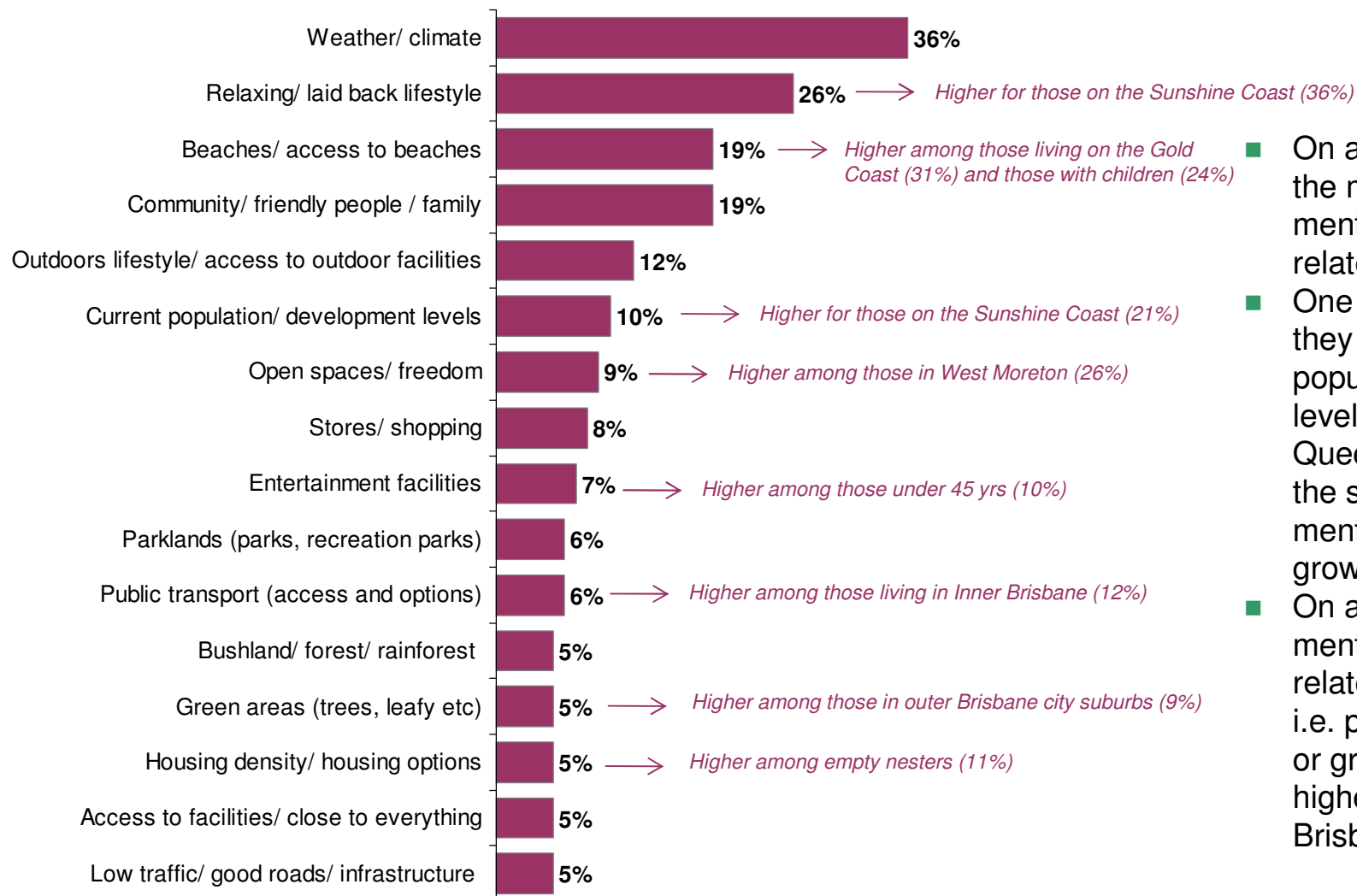
- As with quality of life, ratings for enjoyment of life in SEQ positively correspond with the length of time people have lived in the region:
  - Up to 3 years in SEQ – mean score of 74.6
  - 3-10 years in SEQ – mean score of 80.8
  - 10+ years in SEQ – mean score of 85.0
- Enjoyment is rated slightly lower among students (mean score of 77.8) and those living in high density suburbs (mean score of 76.8).

Inner Brisbane	82.8
Outer Brisbane	81.8
• BCC	82.9
• Greater Bris	80.8
West Moreton	82.2
Gold Coast	85.3
Sunshine Coast	88.2

# What is Valued Strongly About SEQ (Unprompted) – 1



# What is Valued Strongly About SEQ (Unprompted) – 2



- On an unprompted basis, the most frequently mentioned values all relate to 'liveability'.
- One in ten residents said they value the current population/ development levels of South East Queensland (this is *before* the survey made any mention of population growth).
- On a Nett basis, 12% mentioned something related to green spaces i.e. parks, bushland, forest or green areas. This is higher among outer Brisbane residents (17%).

Note: only mentions of 5% or greater are shown here. Other mentions are provided overleaf



# What is Valued Strongly About SEQ (Unprompted) – 3

Other things mentioned by less than 5% of people include:

■ Access to good dining facilities/ food/ produce	4%
■ Safe environment/ safety	4%
■ Access to good hospitals/ good medical care	3%
■ Good employment opportunities/ jobs (general)	3%
■ School system/ education	2%
■ Maintained, clean waterways	2%
■ Clean areas, streets, neighbourhoods	2%
■ Bikeways	1%
■ Public libraries	1%
■ Good cost of living	1%
■ Nothing/ Don't know	4%
■ Other mentions of less than 1% each	

"Free access to beaches, lakes and rivers. Country spots and lookouts, laidback lifestyle. Shopping readily available. Stark countryside, beautiful valleys. Fresh produce/wine"

"Lovely weather; large housing and backyards; well cared for local parks, museums, and public places; great beaches, good community festivals and events"

"It's not too busy, there's plenty of holiday/getaway spots nearby, beaches are close, the weather is pretty good, people are generally friendly"

"Climate, proximity of shopping, transport and entertainment, quality of housing, clean air, quiet neighbourhood"

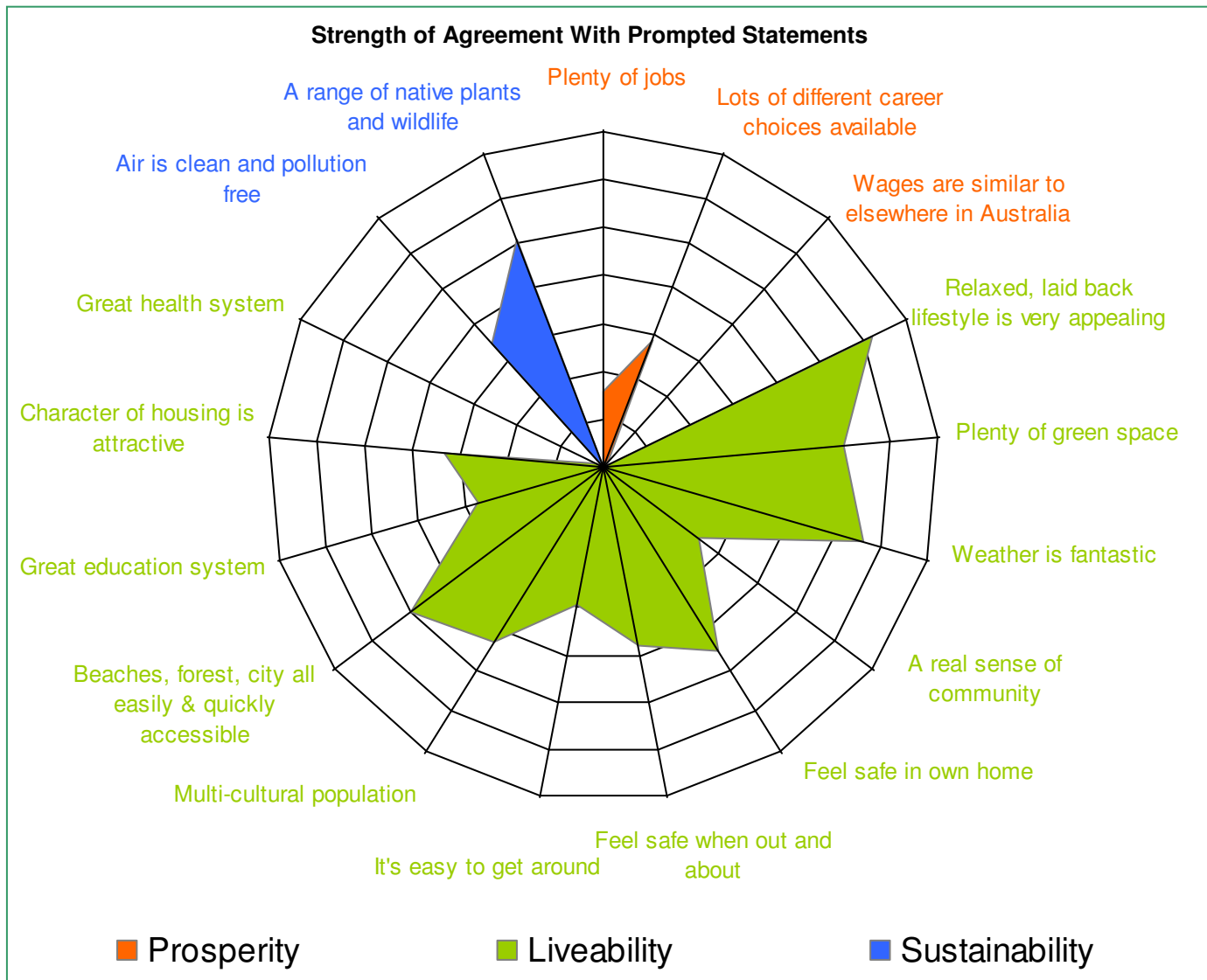
"Lifestyle, safety, work opportunities, leisure activities, children's future possibilities"

"Natural resources - coasts and mountains - fabulous day trips. Relatively inexpensive (compared to regions) services - hospitals/universities/better resources. More jobs. Parks, Roma St., Botanical Gardens, Southbank, river. All great and affordable - transport is good for me"

"That even though I am of low income I feel that I am middle class"



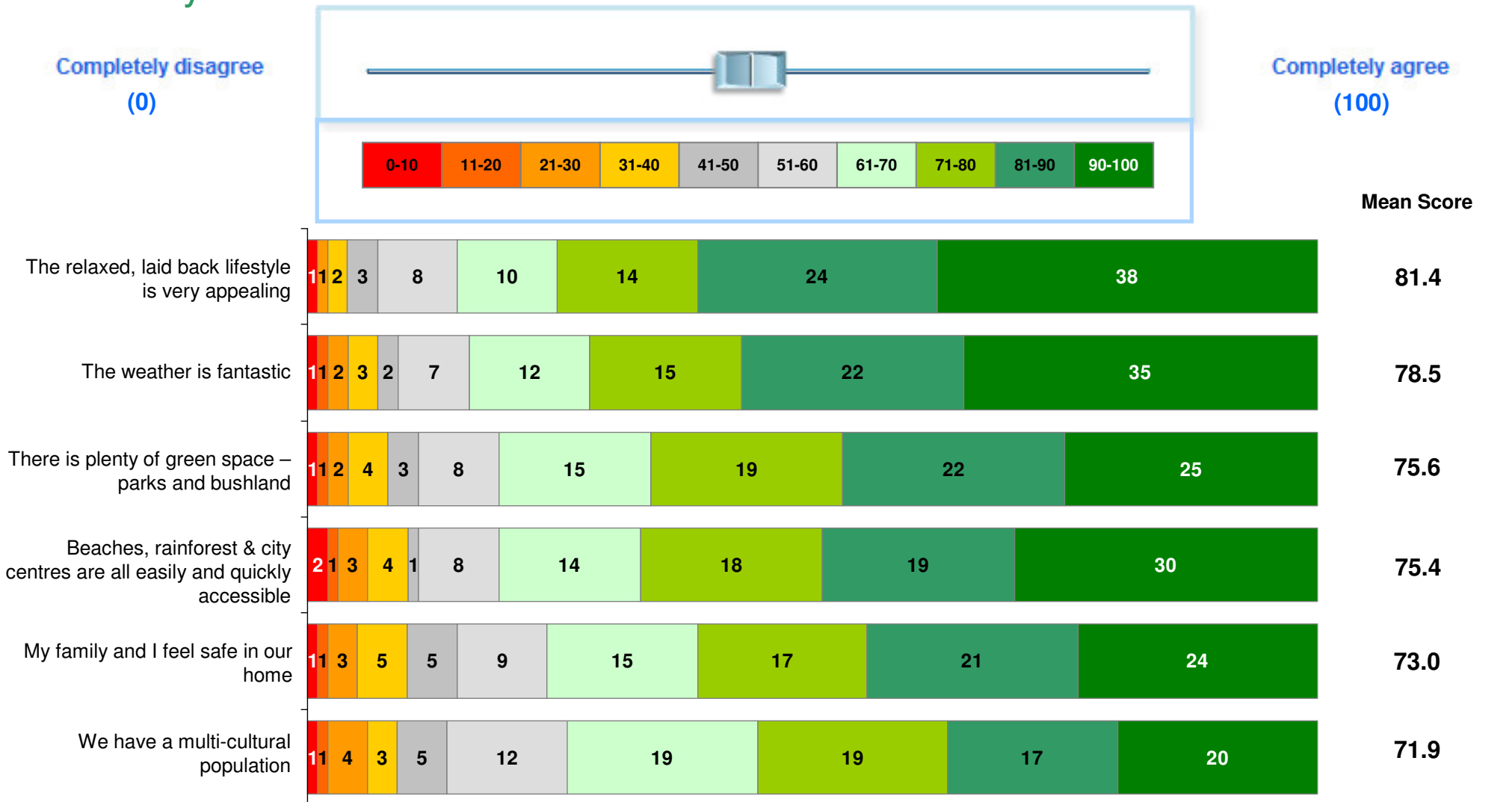
# What Makes SEQ an Enjoyable Place to Live (Prompted) – 1



- This chart shows the strength of agreement with respective statements about South East Queensland that respondents were prompted with. The further out from the centre of the chart, the higher the agreement that this characteristic exists in SEQ.
- When prompted, it is again 'liveability' statements (in green) which have the highest levels of agreement in terms of what makes South East Queensland an enjoyable place to live.
- Data points for comparable wages and great health system do not appear on the chart given very neutral opinions held about them i.e. mean score of around 51 out of 100 on a scale where 0 is 'completely disagree' and 100 is 'completely agree'.
- There were two statements that respondents disagreed (slightly) with and are therefore not shown in the diagram. These are:
  - Very affordable housing
  - Very reasonable cost of living
 Disagreement is significantly higher among renters for both of these.

# What Makes SEQ an Enjoyable Place to Live (Prompted) – 2

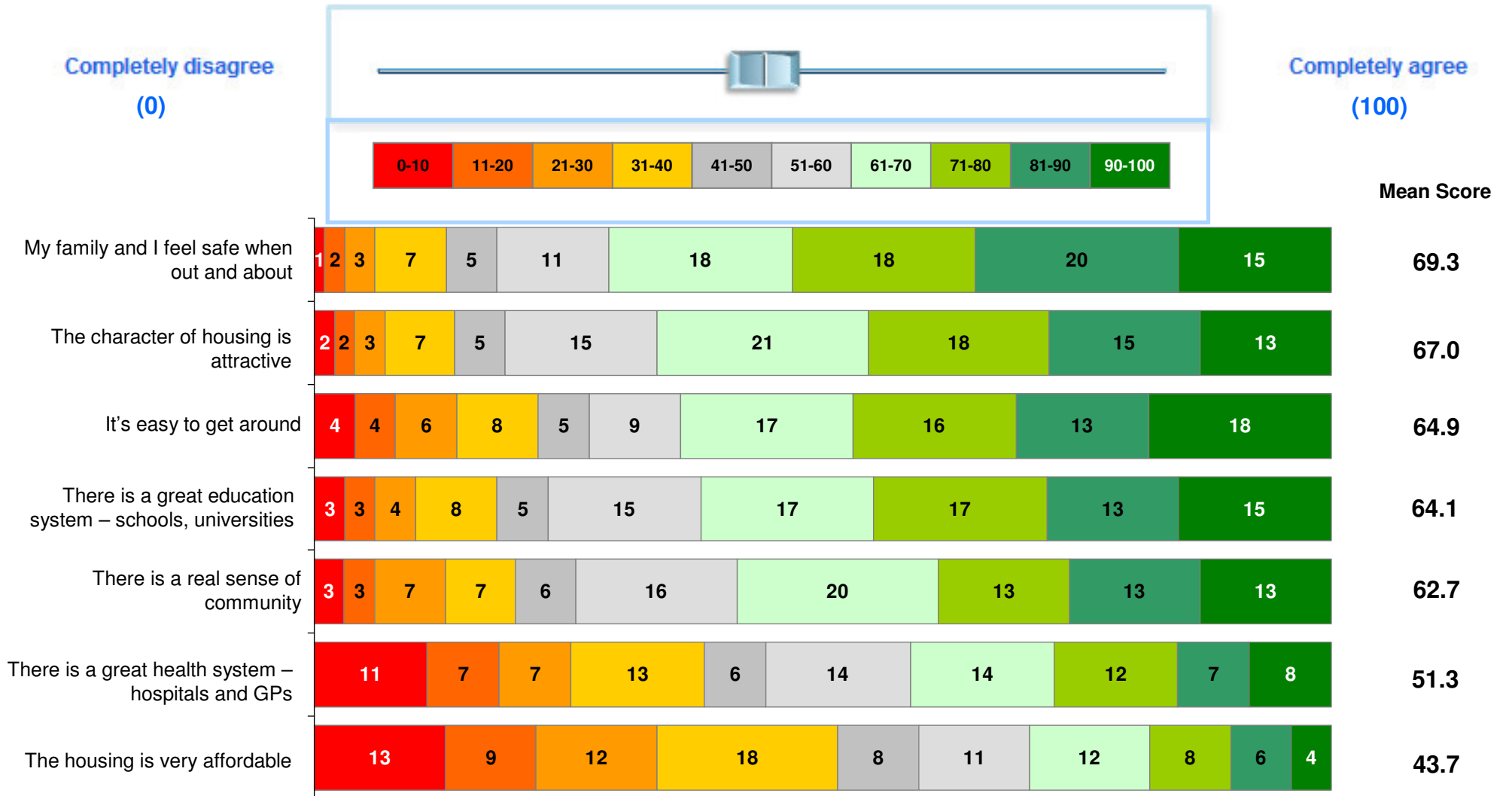
## Liveability Statements



Q3. Here is a list of different reasons other people have given for why they like living in South East Queensland. Thinking about your own situation, please move the pointer to the place which indicates how much you agree or disagree with each statement. (Single response for each statement). Base: Weighted: Total Respondents (n=801)

# What Makes SEQ an Enjoyable Place to Live (Prompted) – 3

## Liveability Statements Cont'd

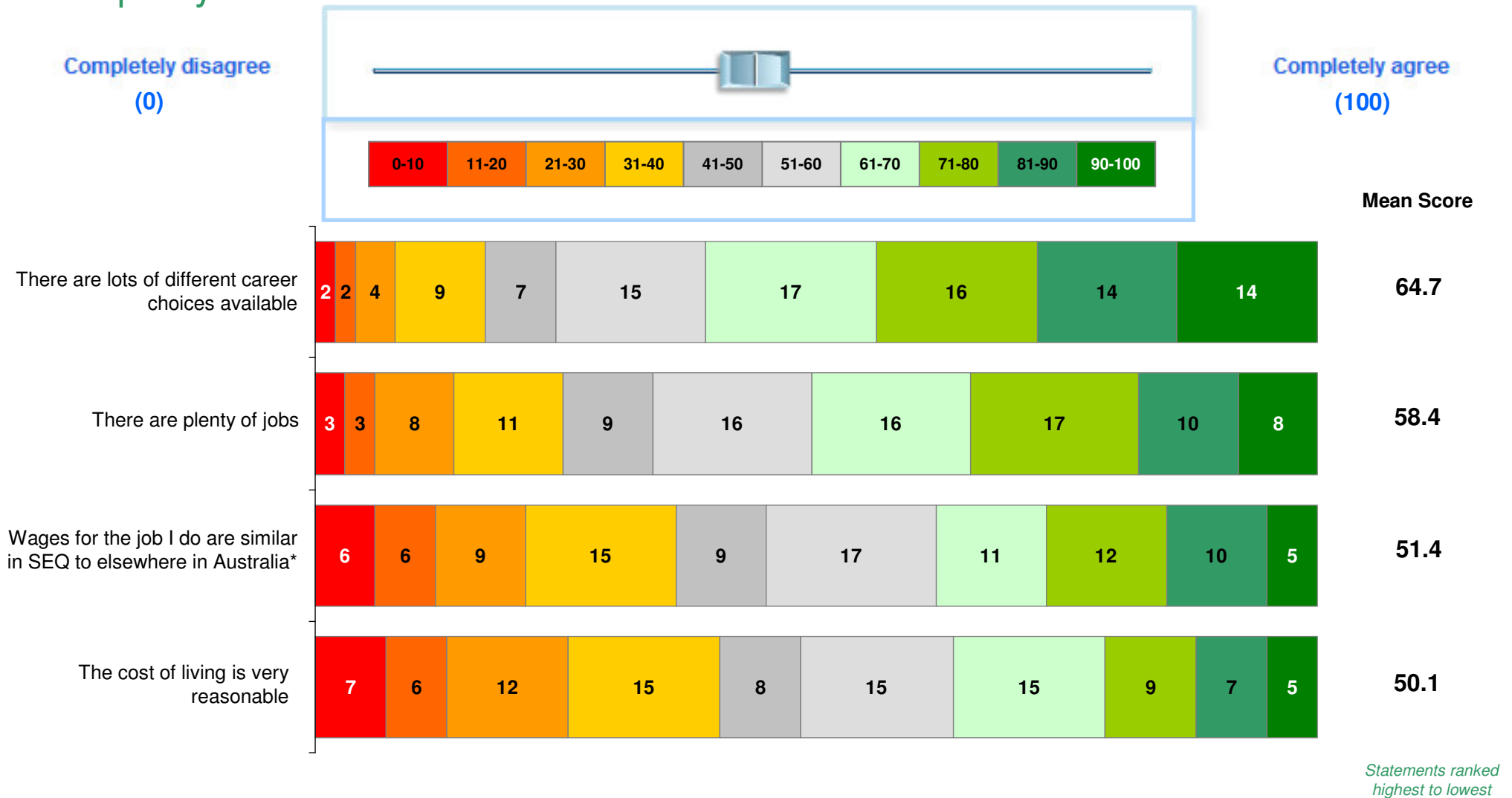


Q3. Here is a list of different reasons other people have given for why they like living in South East Queensland. Thinking about your own situation, please move the pointer to the place which indicates how much you agree or disagree with each statement. (Single response for each statement). Base: Weighted: Total Respondents (n=801)

Statements ranked highest to lowest

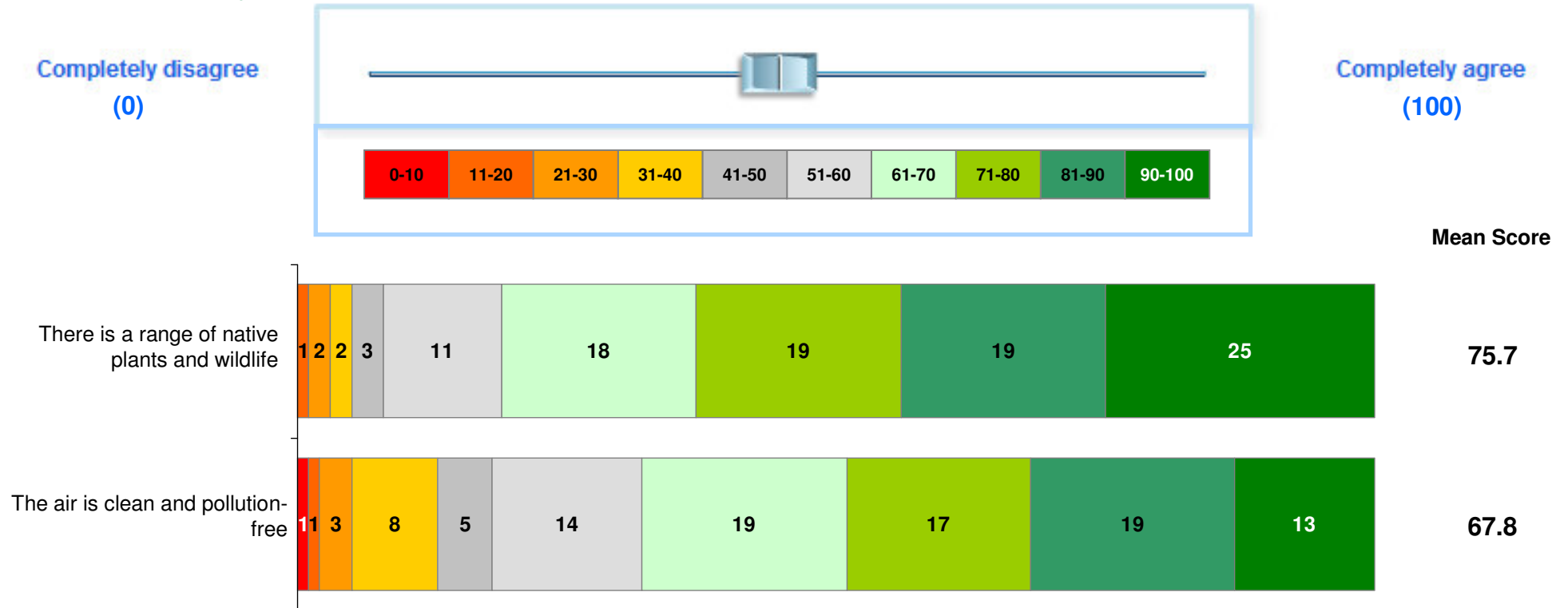
# What Makes SEQ an Enjoyable Place to Live (Prompted) – 4

## Prosperity Statements



# What Makes SEQ an Enjoyable Place to Live (Prompted) – 5

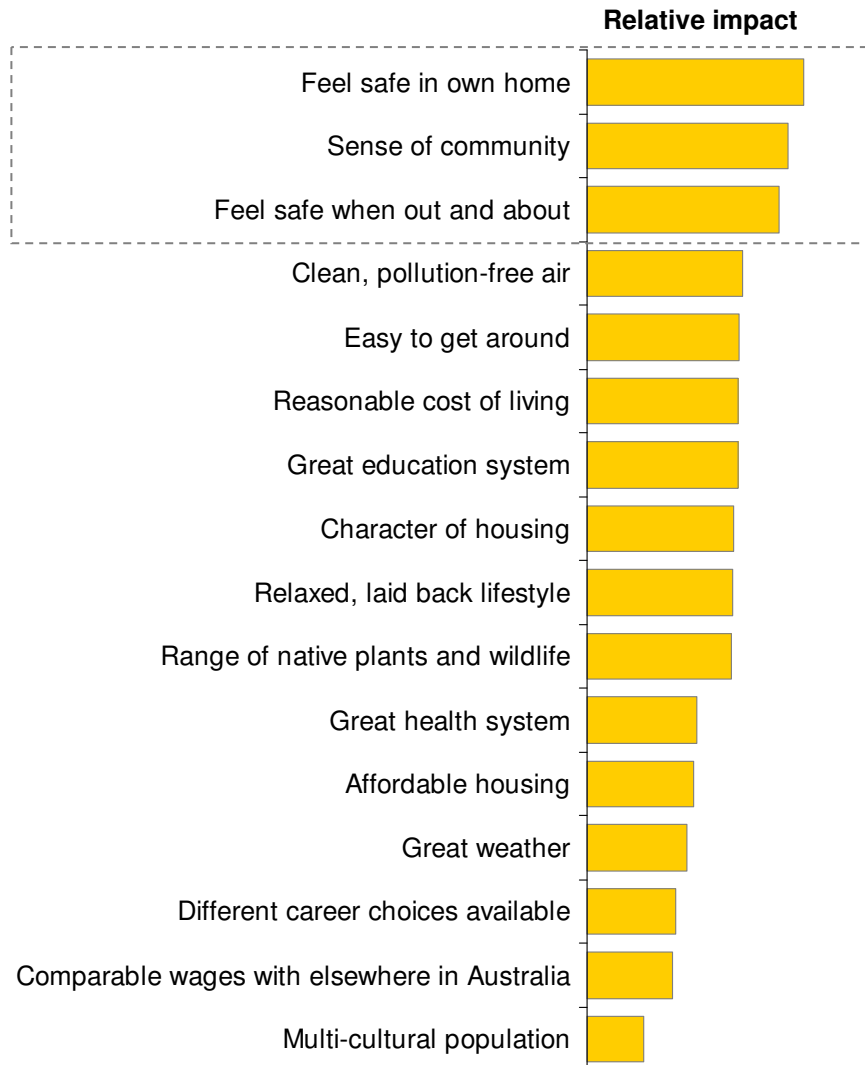
## Sustainability Statements



*Statements ranked highest to lowest*



# Key Drivers of Residents' Enjoyment of Living in South East Queensland



Advanced statistical analyses were conducted to examine underlying relationships in the way respondents answered particular questions, and in this case, see which variables have the most influence on residents' enjoyment of life in South East Queensland. There are high levels of correlation among all the variables rated, and this overlap in correlation is taken into account in the individual levels of impact shown in this chart.

- While earlier it was seen that the weather, laid back lifestyle and access to great beaches were all top of mind mentions of what people really enjoy about life in South East Queensland, further analysis reveals that these aspects place further down the list in terms of what really influences residents' enjoyment and quality of life in the region.
- All of the variables charted are important as they have shown to have some overall impact. However in terms of *relative* importance, key values (and thus priorities) are safety (both at home and in the community) and sense of community.
- Other key influences on people's quality of life in SEQ are clean air, ease of getting around, cost of living, education, character of housing, relaxed lifestyle and range of flora and fauna.

# Key Drivers of Residents' Enjoyment of Living in South East Queensland – Top 5 per Region

## Sunshine Coast

1. Clean, pollution-free air
2. Relaxed, laid back lifestyle
3. Great weather
4. Great education system
5. Character of housing

## West Moreton

1. Sense of community
2. Feel safe when out and about
3. Reasonable cost of living
4. Character of housing
5. Affordable housing

## Gold Coast

1. Sense of community
2. Feel safe in own home
3. Reasonable cost of living
4. Feel safe when out and about
5. Easy to get around

## Outer Brisbane (BCC zone)

1. Easy to get around
2. Sense of community
3. Feel safe when out and about
4. Range of native plants and wildlife
5. Feel safe in own home

## Inner Brisbane

1. Feel safe in own home
2. Clean, pollution-free air
3. Great education system
4. Feel safe when out and about
5. Relaxed, laid back lifestyle

## Greater Brisbane

1. Feel safe in own home
2. Feel safe when out and about
3. Great education system
4. Character of housing
5. Relaxed, laid back lifestyle





# Community Attitudes Towards Population Growth in South East Queensland

# Summary of Community Attitudes Towards Population Growth in SEQ

- South East Queensland residents have **mixed views** about population growth in South East Queensland.
  - On one hand, when asked how population growth will *positively* affect SEQ, residents primarily cited the economic benefits, particularly in terms of increased work opportunities/ a wider skills base (25%) and stimulation of the local economy as a result of competitive businesses and property prices (23%).
  - On the other hand, one in four people (27%) said that there was nothing positive about population growth and didn't want a higher population in SEQ.
  - When asked how population growth will *negatively* affect SEQ, the dominant theme mentioned was infrastructure-related, in particular congestion and inadequate roads (31%), a strain on current infrastructure (24%) and a strain on public transport (10%). Residents also showed concern about crowds and queuing (16%), more competition for jobs (14%), a strain on health services (14%), a threat to wildlife and green spaces (13%) and less housing affordability (12%).
- Overall, the weight of opinion about population growth's effect on SEQ is **slightly unfavourable** (mean rating of 47.4 out of 100, where 0 is 'terrible for SEQ' and 100 is 'great for SEQ').
  - Sunshine Coast residents had the lowest rating regarding the effect of population growth (mean score of 40.8).
- On the surface, the amount of traffic and availability of car parking were rated as being the worst affected by population growth. However, advanced statistical analysis reveals that **sustainability** related issues have the **strongest impact** on residents' perceptions of whether population growth will be a good thing or a bad thing for South East Queensland. Most notably these include the health of waterways and marine life, air quality and the region's water supply. **Housing** issues of density, availability and affordability also impact strongly, as does the amount of green space.
  - All of these are expected to change for the worse with long-term population growth in SEQ.

The following paragraph introduced respondents to the topic of population growth ....

*Queensland has the second fastest growing population in Australia and around 2,000 people move to Queensland every week. Current forecasts predict Queensland's population of 4 million could double to 8 million in less than 50 years. Much of this growth is projected to occur in South East Queensland. Growth in the population comes through overseas and interstate migration as well as natural increase.*



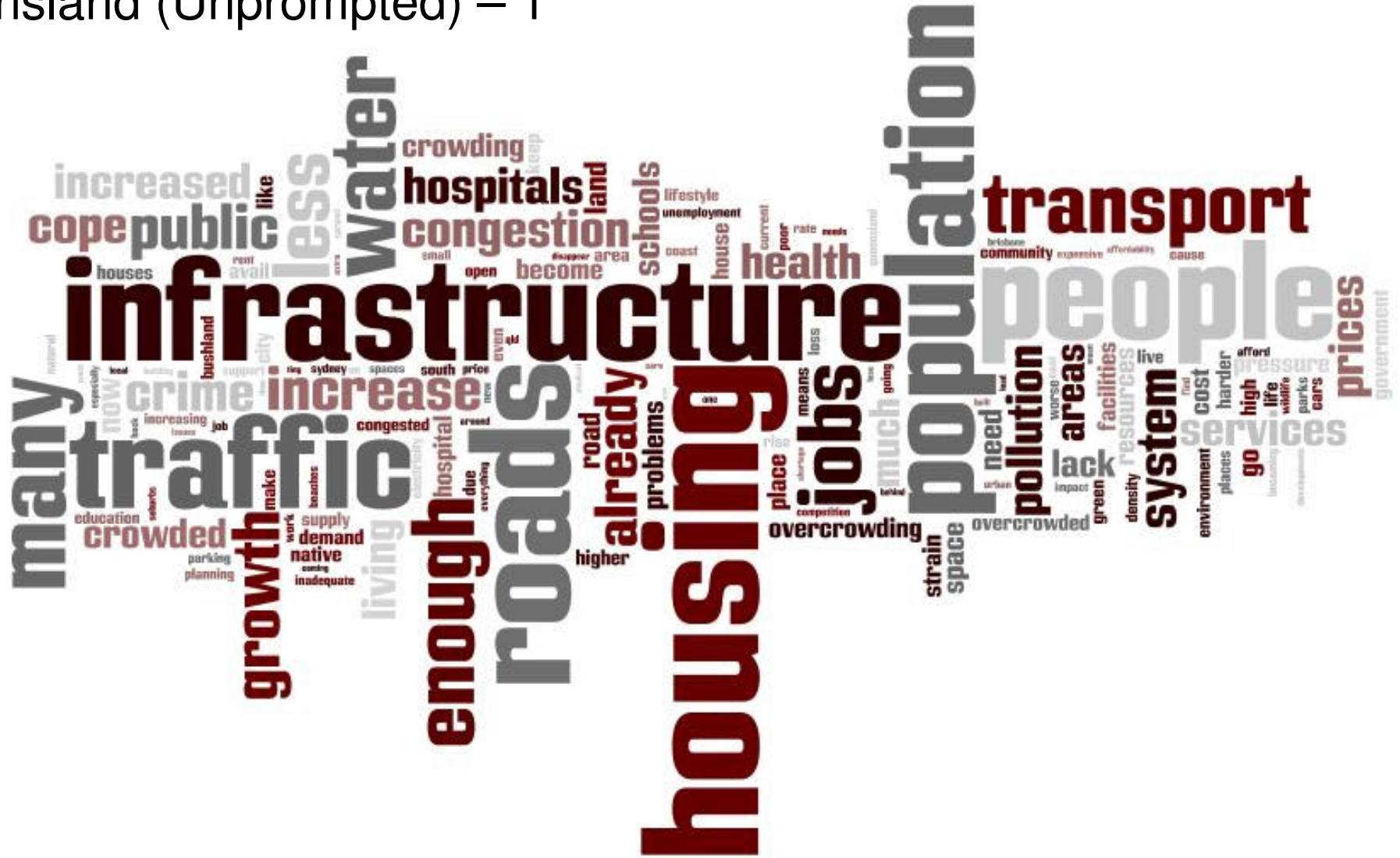
# Positive Effects of Population Growth for South East Queensland (Unprompted) – 1



# Positive Effects of Population Growth for South East Queensland (Unprompted) – 2

<b>Economic (43%)</b>	Increased jobs / work opportunities / wider skills base	25%	<i>Higher mention of economic benefits by those under 45 years (48%) and those who are currently employed (50%)</i>
	Better for the local economy / competitive businesses / property prices	23%	
	More people paying taxes / rates	2%	
	Will keep costs down	2%	
<b>Infrastructure (12%)</b>	Improved public transport	5%	<i>Higher mention of infrastructure benefits by those who have lived in SEQ for over 10 years (14%)</i>
	Improved road network	2%	
	Better infrastructure (not roads or public transport)	6%	
<b>Cultural (9%)</b>	More multicultural / cosmopolitan	8%	<i>Higher mention of multiculturalism by those in Inner Brisbane (14%)</i>
	Improved / more diverse entertainment / leisure options e.g. dining, nightlife, festivals, concerts etc.	1%	
<b>Social (6%)</b>	Improved community facilities	4%	
	New ideas / different approaches	1%	
	Greater community spirit	1%	
<b>Services (3%)</b>	Better hospitals / health system	3%	
	Better schools / universities	2%	
<b>Political (1%)</b>	Governments made to think long-term / large scale investments necessary	1%	
	Other	8%	
<b>Negative (27%)</b>	Don't know	7%	<i>Higher negative response by retirees (36%)</i>
	Do not want more population growth / may lose jobs / existing infrastructure won't cope	19%	
	None / nothing positive	8%	

## Negative Effects of Population Growth for South East Queensland (Unprompted) – 1



# Negative Effects of Population Growth for South East Queensland (Unprompted) – 2

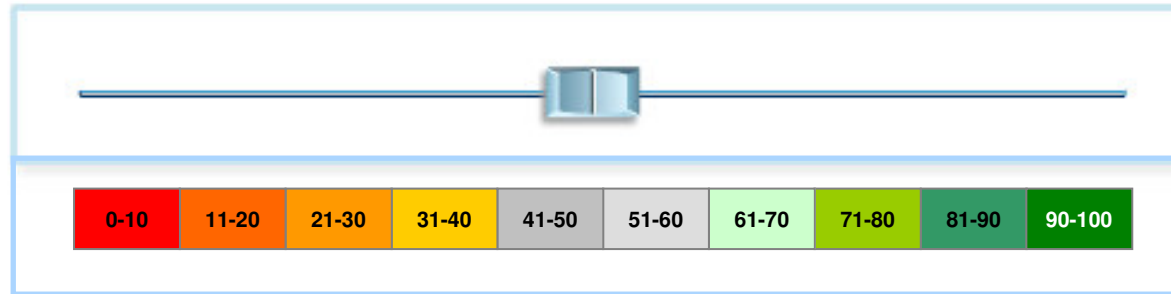
<b>Infrastructure (51%)</b>	• Greater congestion / inadequate roads	31%	
	• Strain on infrastructure (water / sewerage / waste / electricity)	24%	
	• Strain on public transport	10%	➔ Higher among those in Greater Brisbane (18%)
	• Lack of parking / car parks	1%	
<b>Social (28%)</b>	• More people / crowds / queues	16%	
	• Increased crime rate	9%	➔ Higher among those aged 45+ years (12%)
	• Loss of community spirit / small town atmosphere	3%	➔ Higher among those on the Sunshine Coast (8%)
	• Beaches will become over-populated / crowded	2%	
	• Big city mentality / less interest in social problems	1%	
<b>Housing (25%)</b>	• Less housing affordability	12%	➔ Higher among those under 45 years (17%) and those currently renting (18%)
	• Increase in housing density	7%	
	• Not enough housing / not enough space	7%	
	• Block sizes decrease	1%	
	• Potential for ghettos / slums	1%	
<b>Economic (20%)</b>	• Less jobs / more competition for jobs	14%	
	• Increased cost of living	5%	Economic concerns are higher among those new to their current home (<3 yrs) (25%)
	• City will be less liveable / cost of living too high	2%	
<b>Environmental (20%)</b>	• Threat to wildlife / loss of green space / bushland	13%	
	• Greater environmental pollution	8%	➔ Higher among those under 45 years (11%)
	• Our region spreading beyond its borders	2%	
<b>Services (16%)</b>	• Strain on health services	14%	➔ Higher among those on the Sunshine Coast (25%)
	• Strain on education services	7%	
<b>Cultural (5%)</b>	• Negative opinion of multiculturalism / mixed ethnicities	5%	
<b>Political (2%)</b>	• State Government hasn't planned properly for population growth	1%	
	• Other	5%	
	• Don't know	3%	
	• None / no concerns	4%	



# Impact of Population Growth on SEQ

Population growth ...

is terrible for South East  
Queensland  
(0)

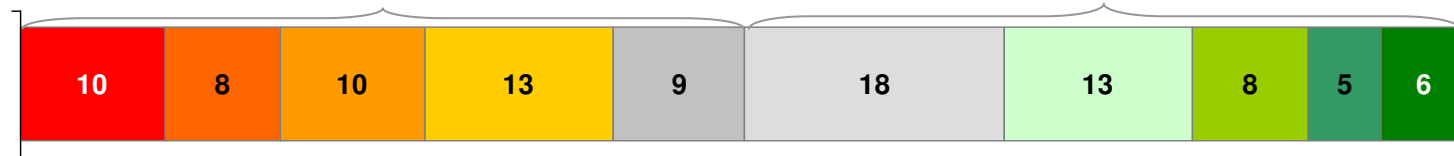


is great for South East  
Queensland  
(100)

**Total Negative (0 - 50)**  
50%

**Total Positive (51 - 100)**  
50%

**Mean Score**



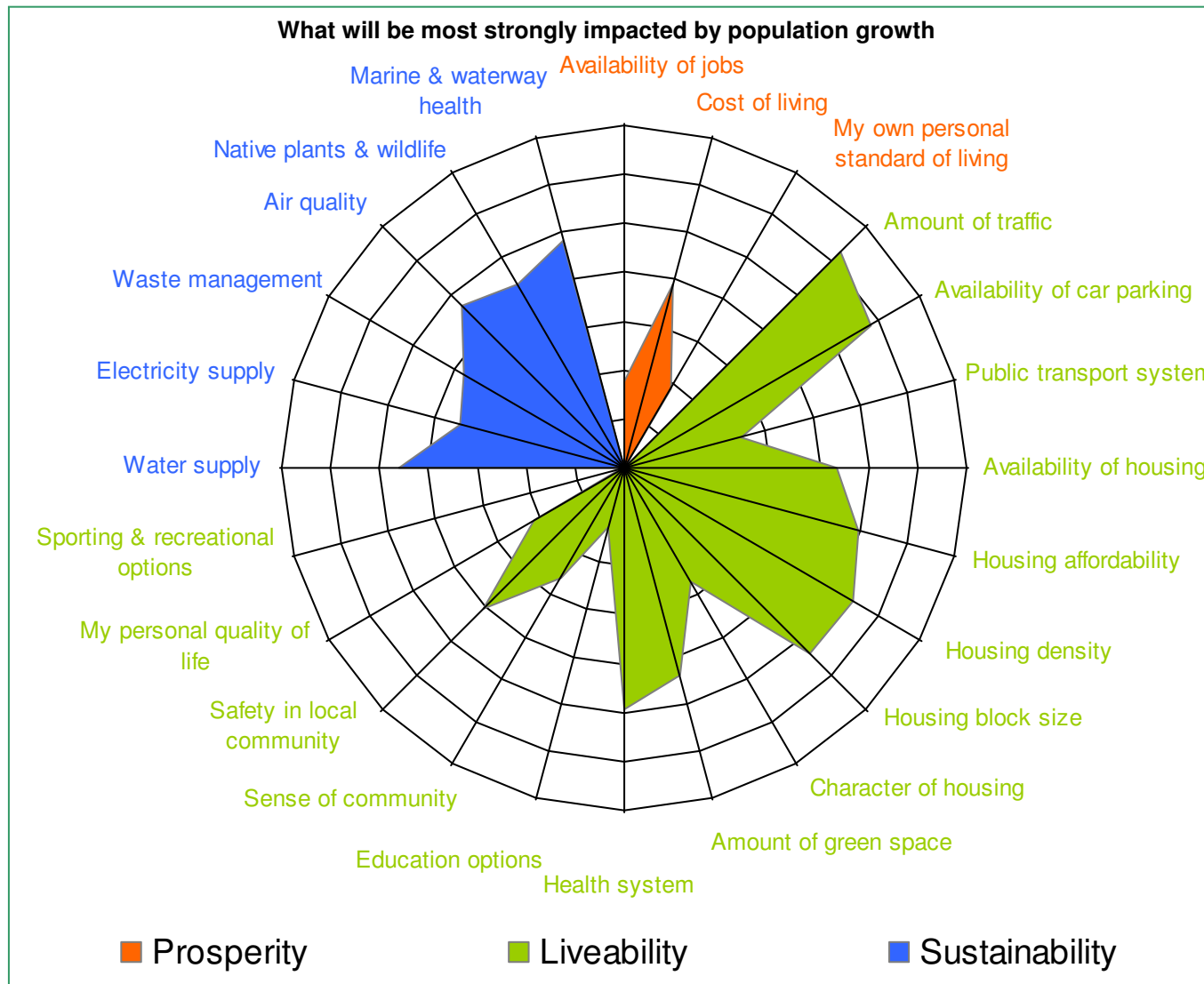
**47.4**

- Opinion regarding the effect of population growth for South East Queensland is polarised – as many people rated it negatively as those who rated it positively.
- The weight of opinion, however, is slightly more negative with a mean score of 47.4 out of 100.
  - Those on the Sunshine Coast are least positive about population growth (63% rated it negatively; 37% rated it positively, with a mean score of 40.8).
  - Long time SEQ residents (10+ years) also view population growth less favourably (53% rated it negatively; 47% rated it positively, with a mean score of 46.1)

Inner Brisbane	47.5
Outer Brisbane	49.1
• BCC	50.3
• Greater Bris	48.0
West Moreton	46.2
Gold Coast	47.5
Sunshine Coast	40.8



# Effect of Long-Term Population Growth (Prompted) – 1



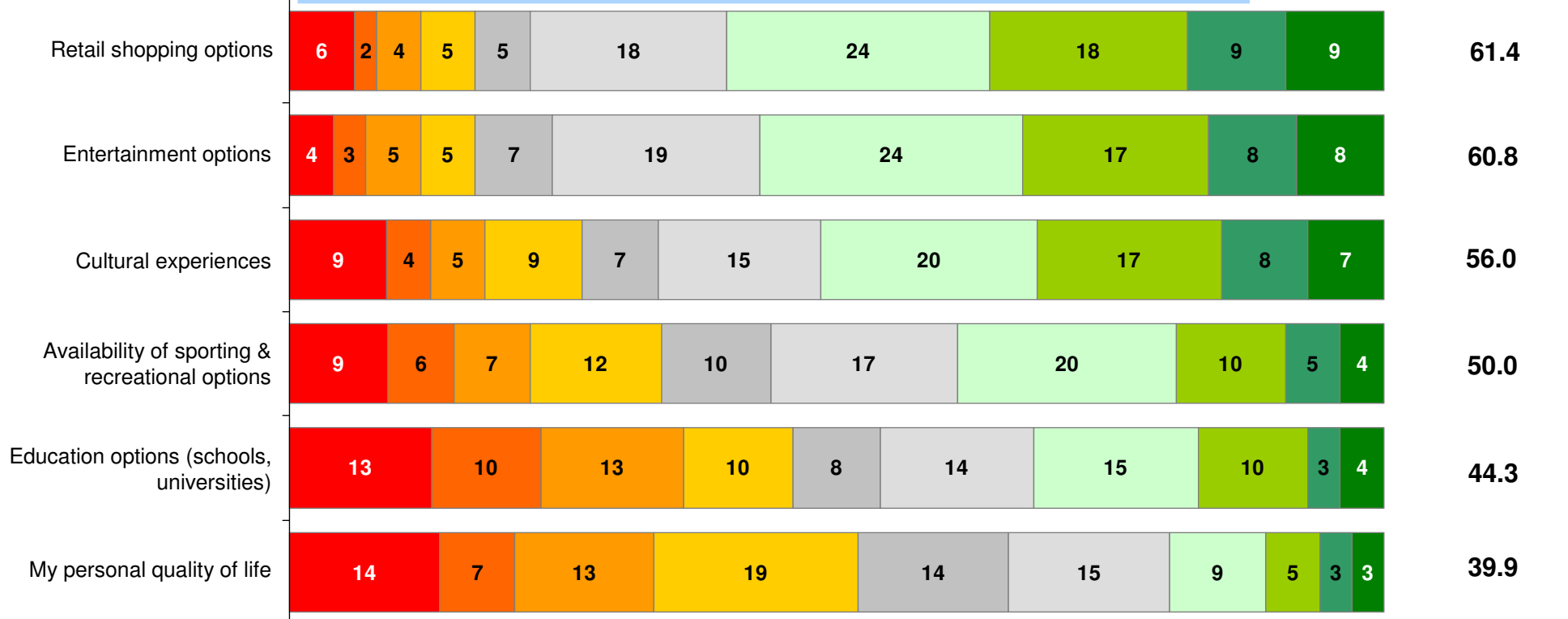
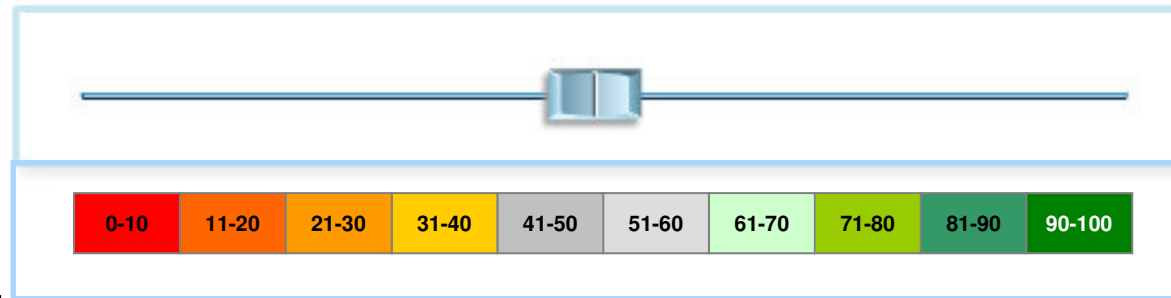
- Respondents were shown a list of statements and asked whether they expected each to change for the better or change for the worse with an increasing population.
- This chart shows the strength of opinion that respective statements are expected to *change for the worse* i.e. rated 50 or below out of 100 where 0 is 'change for the worse' and 100 is 'change for the better'. The further out from the centre of the chart, the more that factor is felt to be negatively impacted as a result of a growing population.
- In particular, issues related to 'sustainability' (in blue) are expected to be negatively impacted by long-term population growth.
- Traffic and car parking as well as several housing related issues are also expected to be negatively impacted.
- The data point for sporting and recreational options does not appear on the chart given opinion about this is neutral i.e. mean score of 50 out of 100.
- Only three of the issues respondents were prompted with are expected to change for the better with an increasing population i.e. rated 51 or higher out of 100. These are not shown on this chart, but they are:
  - Retail shopping options
  - Entertainment options
  - Cultural experiences

# Effect of Long-Term Population Growth (Prompted) – 2

## Liveability Statements

Change for the worse  
(0)

Change for the better  
(100)

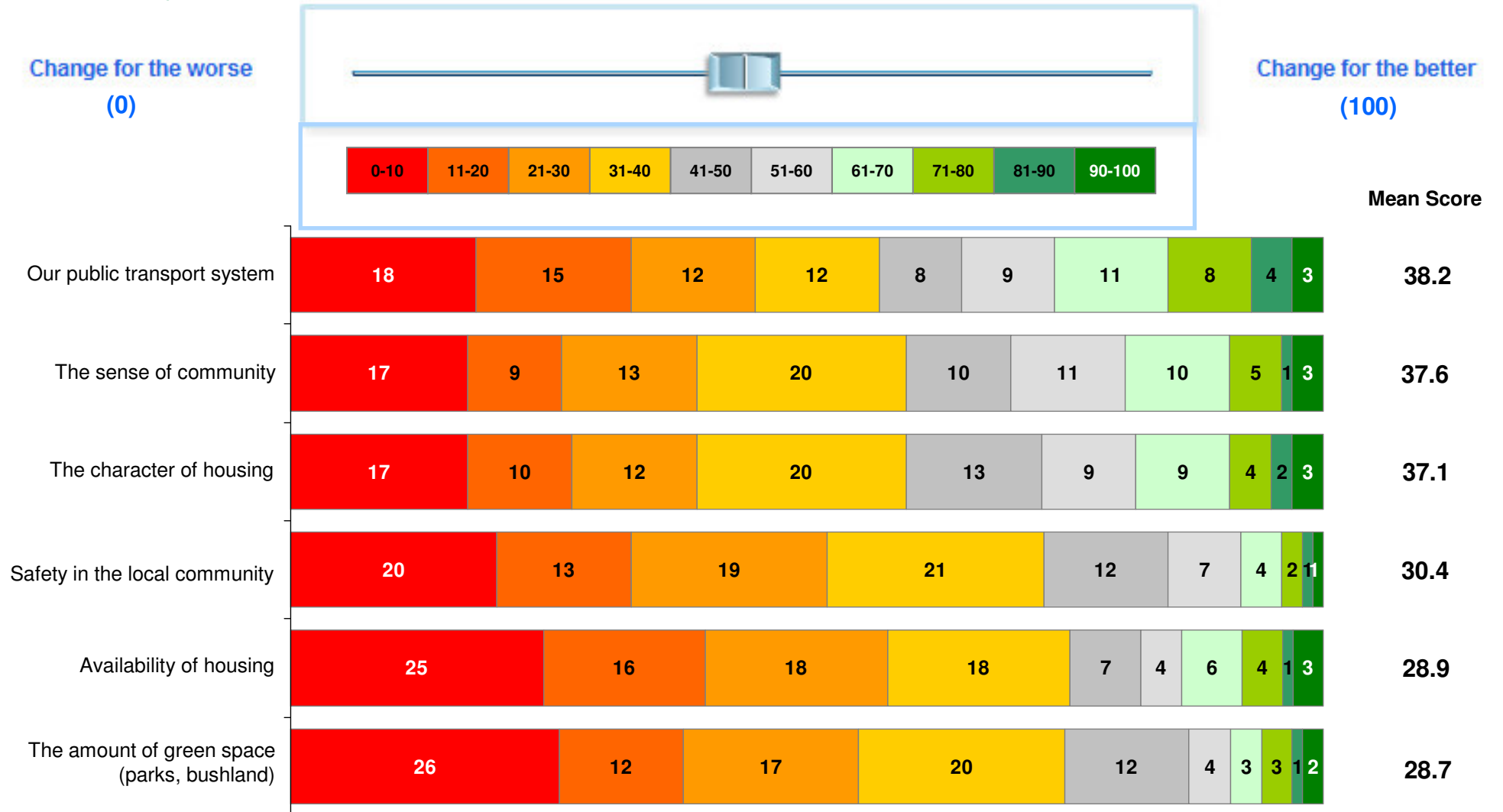


Q5. Here is a list of things which may change with an increasing population. For each one, please move the pointer to the place which indicates the type of change you think long-term population growth will have in South East Queensland as a whole. With long-term population growth, **[statement]** in South East Queensland will ... (Single response for each statement)  
Base: Weighted: Total Respondents (n=801)

Statements ranked  
highest to lowest

# Effect of Long-Term Population Growth (Prompted) – 3

## Liveability Statements Cont'd

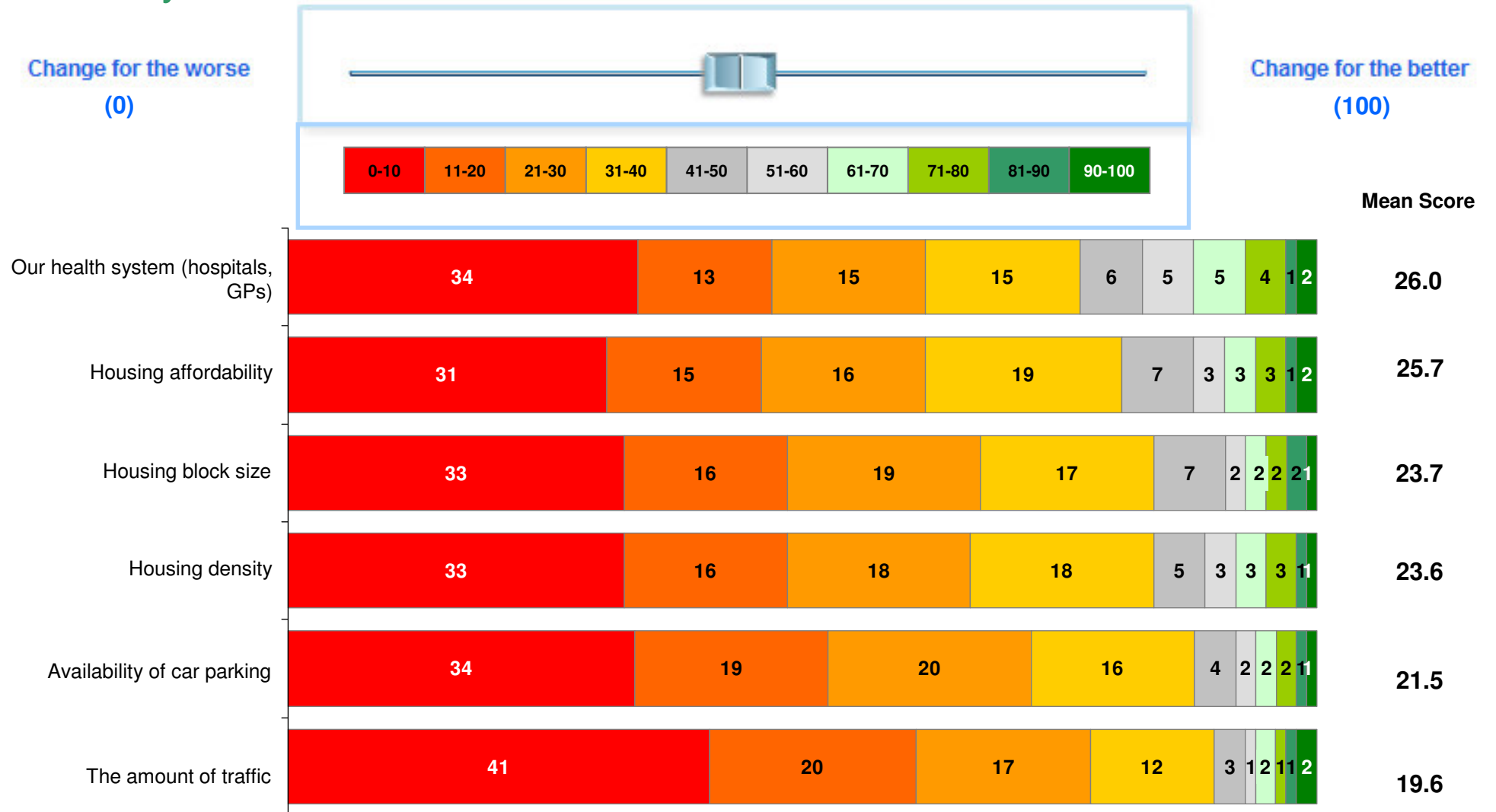


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 Base: Weighted: Total Respondents (n=801)

*Statements ranked highest to lowest*

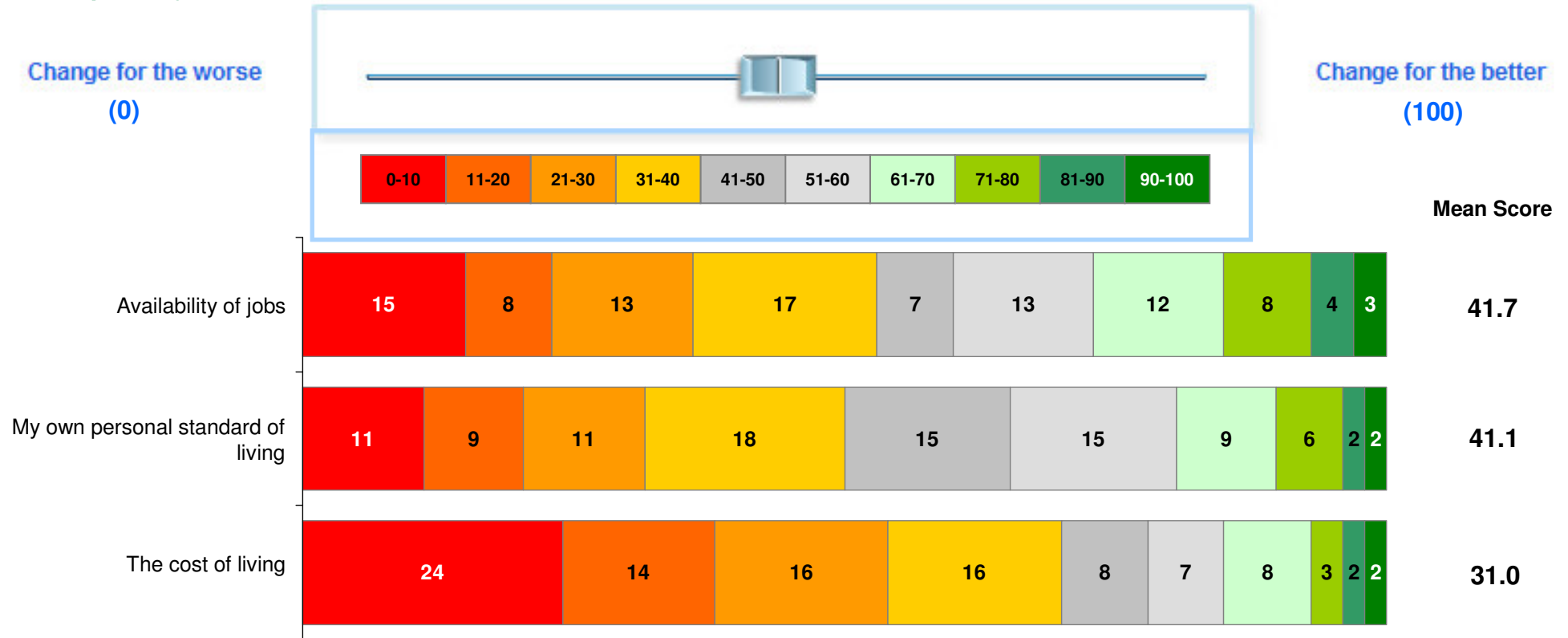
# Effect of Long-Term Population Growth (Prompted) – 4

## Liveability Statements Cont'd



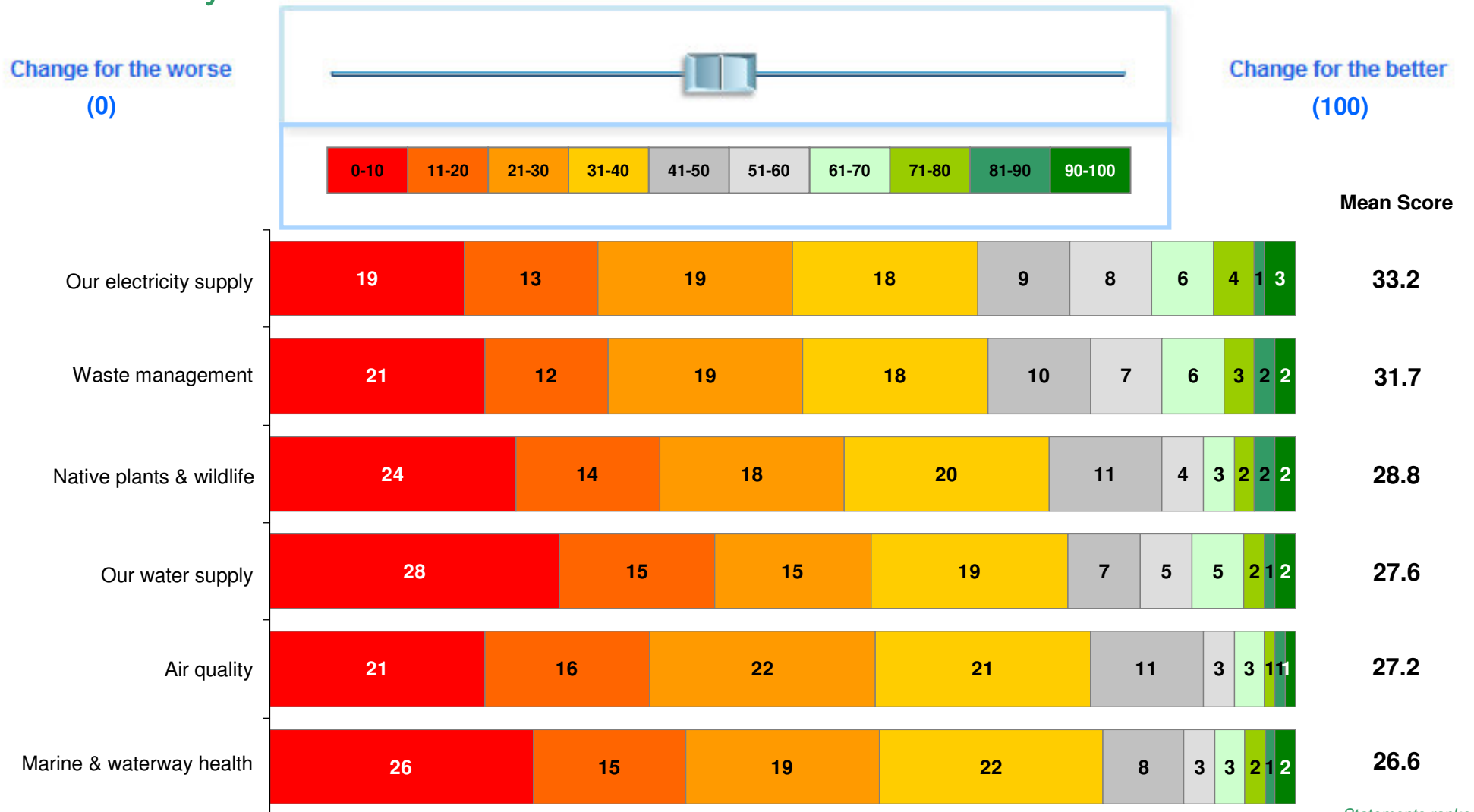
# Effect of Long-Term Population Growth (Prompted) – 5

## Prosperity Statements



*Statements ranked highest to lowest*

# Effect of Long-Term Population Growth (Prompted) – 6 Sustainability Statements

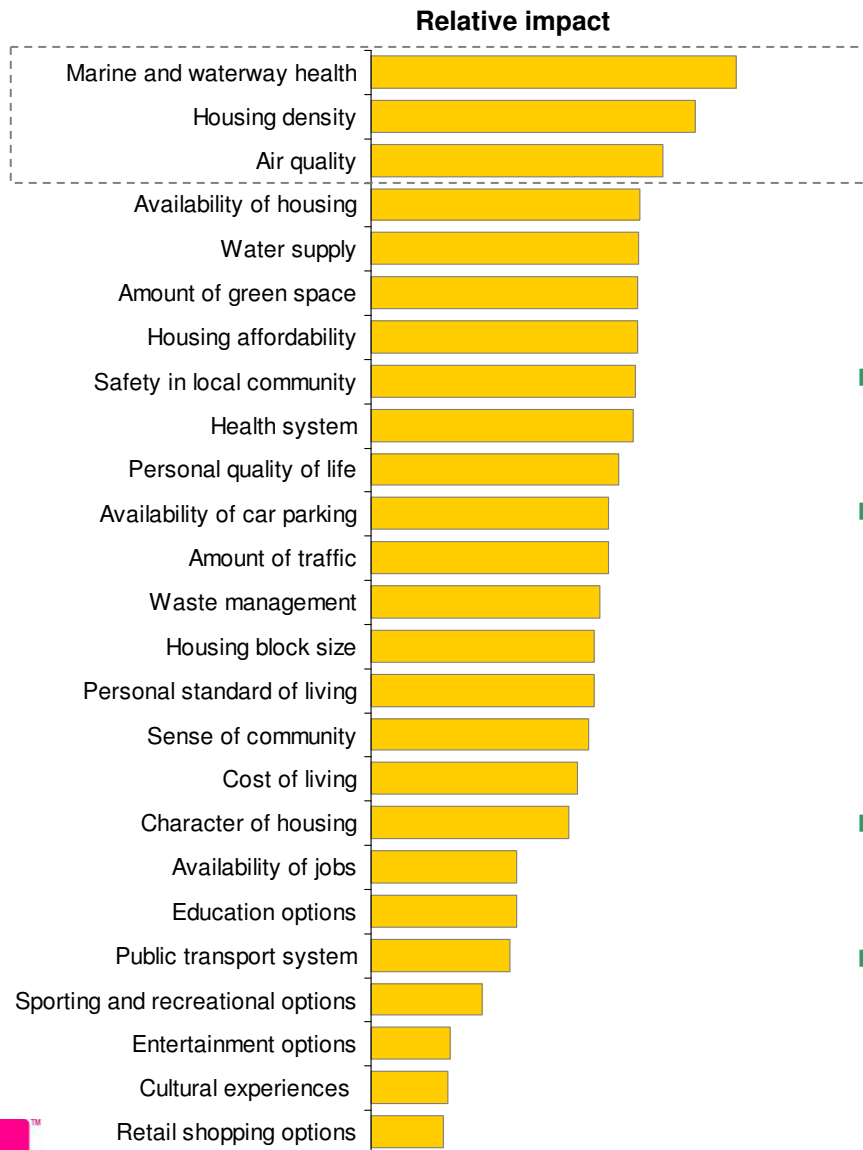


Q5. Here is a list of things which may change with an increasing population. For each one, please move the pointer to the place which indicates the type of change you think long-term population growth will have in South East Queensland as a whole. With long-term population growth, **[statement]** in South East Queensland will ... (Single response for each statement)  
Base: Weighted: Total Respondents (n=801)

*Statements ranked highest to lowest*



# Key Impacts on Perceptions of Population Growth



Advanced statistical analyses were conducted to examine underlying relationships in the way respondents answered particular questions, and in this case, see which variables significantly influence residents' overall feelings about population growth in South East Queensland. There are high levels of correlation among all the variables rated, and this overlap in correlation is taken into account in the individual levels of impact shown in this chart.

- All of the variables charted are important as they have shown to have some overall influence.
- However in terms of *relative importance*, issues related to sustainability - in particular, the health of waterways and marine life, air quality and water supply - have the strongest influence on residents' perceptions of whether population growth will be a good thing or a bad thing for South East Queensland.
- Housing related issues also impact strongly. These include density, availability and affordability.
- While green space was shown to not have a significant impact on residents' overall enjoyment of life in South East Queensland, it does affect people's perceptions of population growth on the region.

# Key Impacts on Perceptions of Population Growth – Top 5 per Region

## Sunshine Coast

1. Air quality
2. Marine and waterway health
3. Housing density
4. Safety in local community
5. Amount of green space

## Outer Brisbane (BCC zone)

1. Health system
2. Amount of green space
3. Personal quality of life
4. Housing density
5. Water supply

## West Moreton

1. Housing density
2. Water supply
3. Availability of car parking
4. Waste management
5. Health system

## Inner Brisbane

1. Marine and waterway health
2. Air quality
3. Housing affordability
4. Housing density
5. Availability of housing

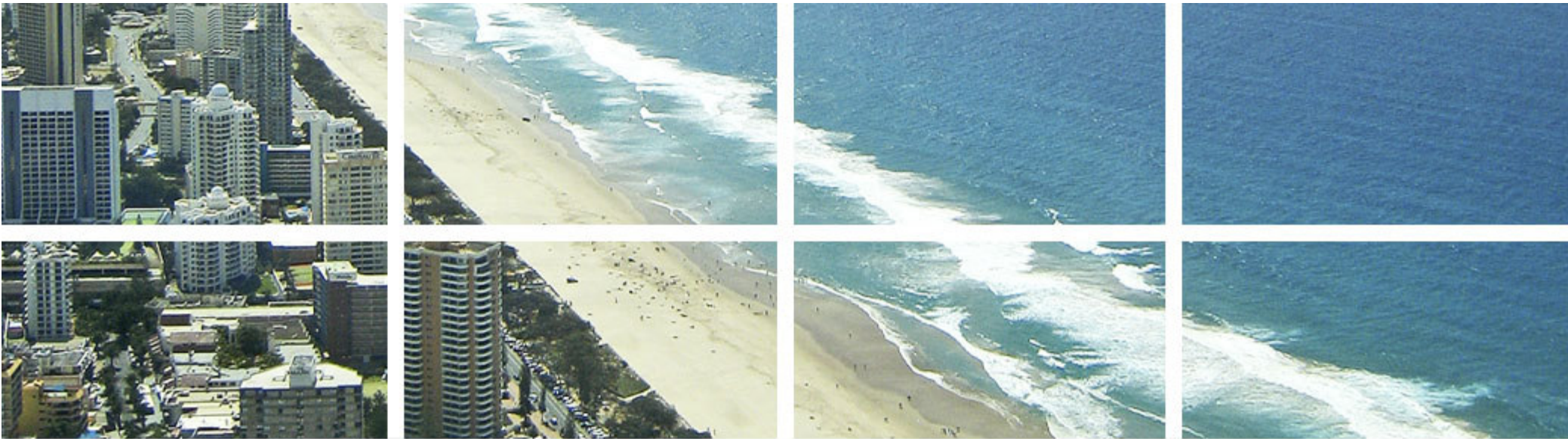
## Gold Coast

1. Marine and waterway health
2. Availability of car parking
3. Waste management
4. Housing block size
5. Safety in local community

## Greater Brisbane

1. Marine and waterway health
2. Air quality
3. Housing density
4. Availability of car parking
5. Housing block size





# Community Attitudes Towards Housing Density in South East Queensland

# Summary of Community Attitudes Towards Housing Density in SEQ

- **High density** housing is considered to be best suited to Brisbane's inner city. It has a mean suitability score of 72.6 on a scale of 0 to 100, where 0 is 'Not at all suited' and 100 is 'Very well suited'.
- **Medium density** housing is seen to be best suited to major suburban centres with transport interchanges (mean score of 70.1) as well as major coastal tourism centres (mean score of 65.7), and to a lesser extent Brisbane's inner city (mean score of 62.6).
- **Low density** housing is seen to be best suited to suburban areas (mean score of 74.4).
- The most attractive aspects of living in higher density are the closeness to amenities and/or work (21%), better use of space (13%), reduced reliance on private vehicles [more efficient use of public transport] (13%) and low home or garden maintenance (11%). However, on a spontaneous basis, three in ten people could not think of anything positive about higher density living.
- When asked about negative aspects of higher density living, the most common response was the feeling of being overcrowded or having no space (35%). Other concerns are noise levels (16%) and not having a backyard or garden (15%), particularly for those with children.
- Those currently living in low or medium density housing are most likely to consider moving to higher density under the following circumstances: if they wanted to be closer to the city or town centre (58%); if they wanted a lower maintenance house (57%); if they wanted a lower or no maintenance garden (56%); or if they wanted to reduce their travel time (50%).



## The following paragraph introduced respondents to the topic of housing density ....

*There are various housing options available to accommodate the extra people who will be living in South East Queensland.*



### **High Density Living**

*High density living ranges from medium-rise apartments, potentially in a mixed-use development, to high-rise apartments*



### **Medium Density Living**

*Medium density living includes low-rise apartments, shop-top housing, small lot housing and townhouses or villas*

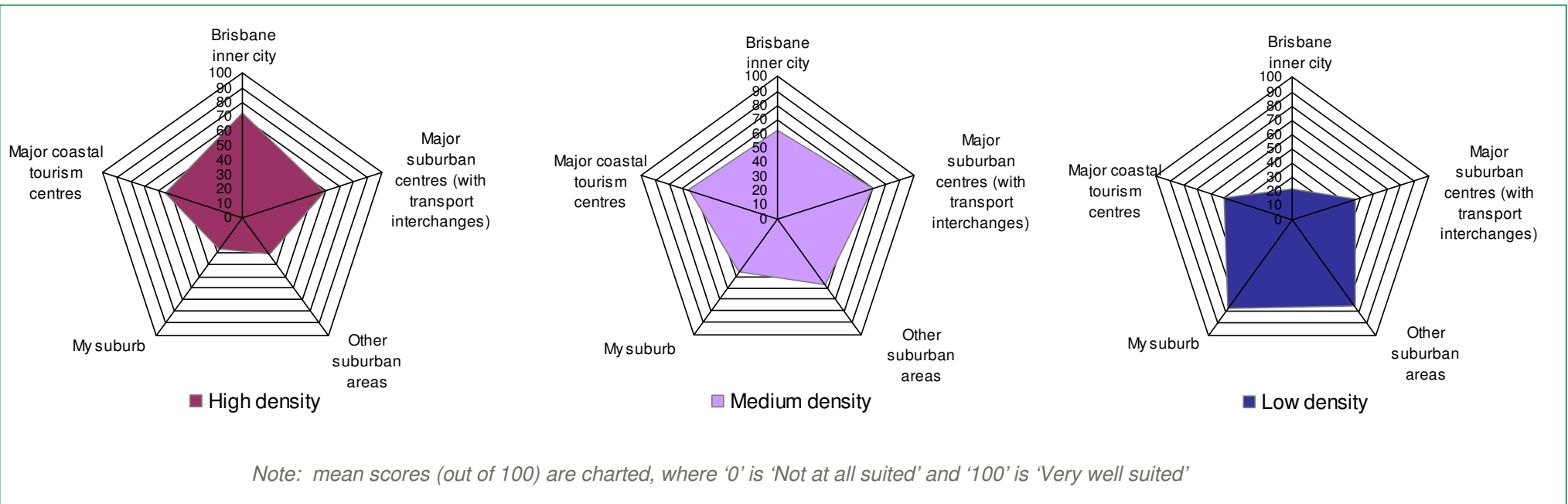


### **Low Density Living**

*Low density living includes single houses and duplexes on medium to large lots*



# Suitability of Housing Densities

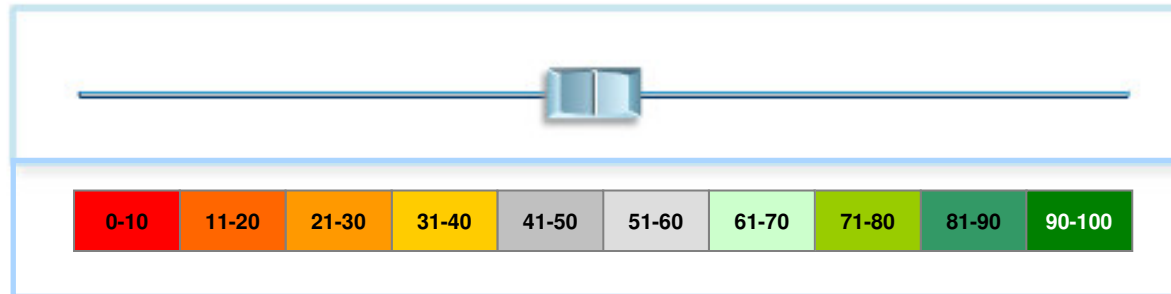


- High density housing is seen to be best suited to the inner city of Brisbane (within 5km of the CBD) – mean suitability score of 72.6 out of 100.
- Medium density housing is seen to be best suited to major suburban centres which have transport interchanges, such as Indooroopilly, Garden City, Chermside, Maroochydore and Robina – mean suitability score of 70.1 out of 100.
  - It is also perceived to be suitable for major coastal tourism centres (mean score of 65.7) and Brisbane's inner city (mean score of 62.6)
- Low density housing is seen to be best suited to suburbs
  - Suitability of low density housing to 'my suburb' averaged 76.5 while for other suburbs it averaged 74.4.

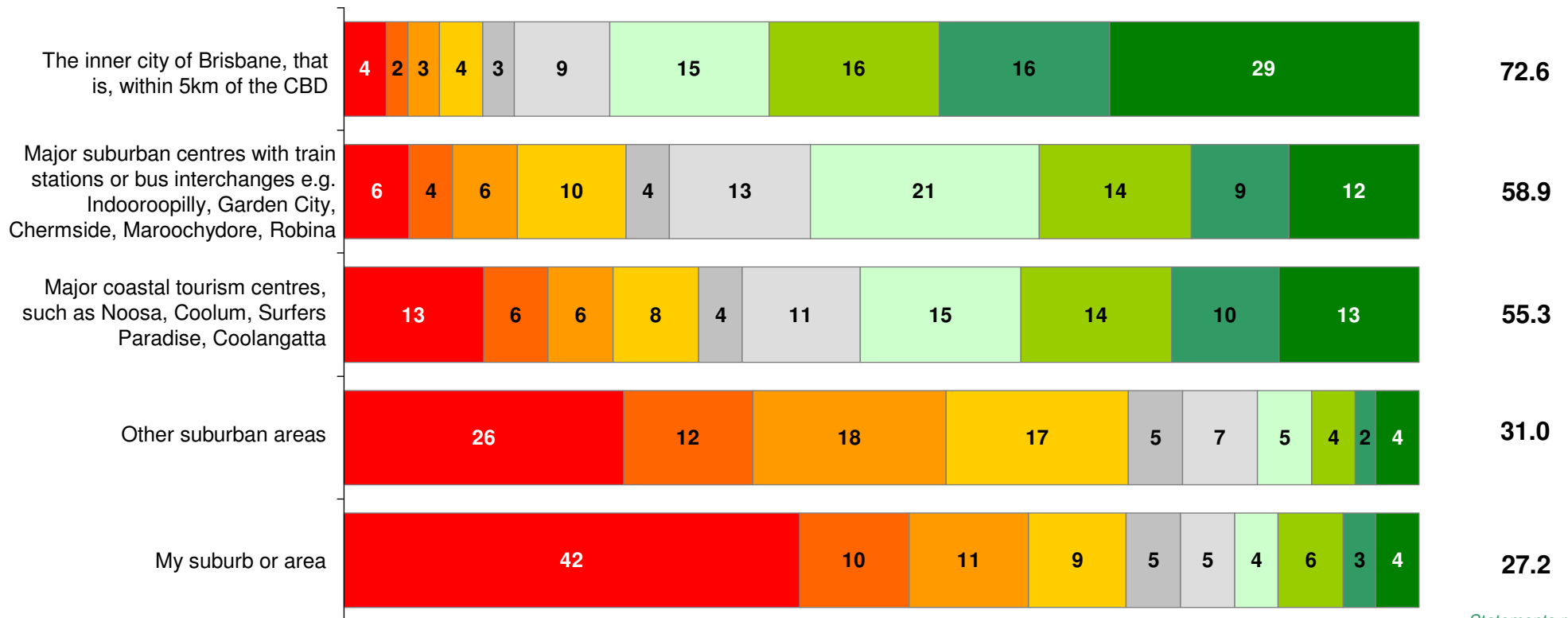
# Suitability of High Density Living

Not at all suited  
(0)

Very well suited  
(100)



Mean Score

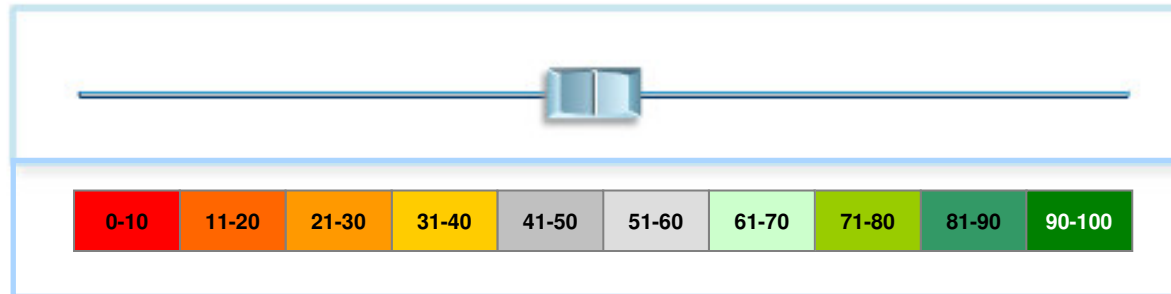


Statements ranked  
in order of suitability

# Suitability of Medium Density Living

Not at all suited  
(0)

Very well suited  
(100)



Mean Score

Major suburban centres with train stations or bus interchanges e.g. Indooroopilly, Garden City, Chermside, Maroochydore, Robina



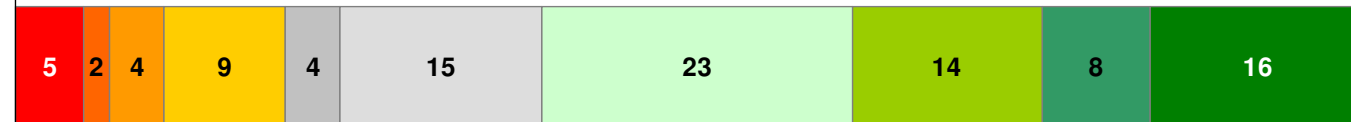
70.1

Major coastal tourism centres, such as Noosa, Coolumb, Surfers Paradise, Coolangatta



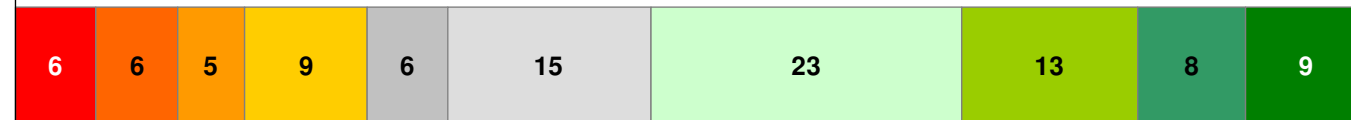
65.7

The inner city of Brisbane, that is, within 5km of the CBD



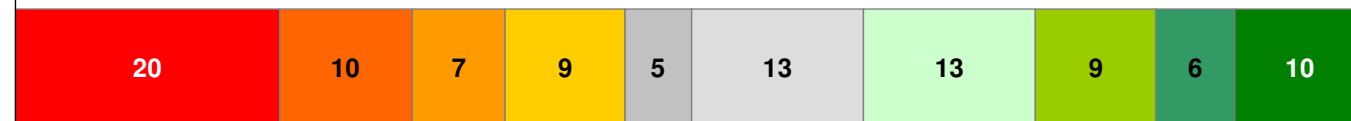
62.6

Other suburban areas



56.4

My suburb or area

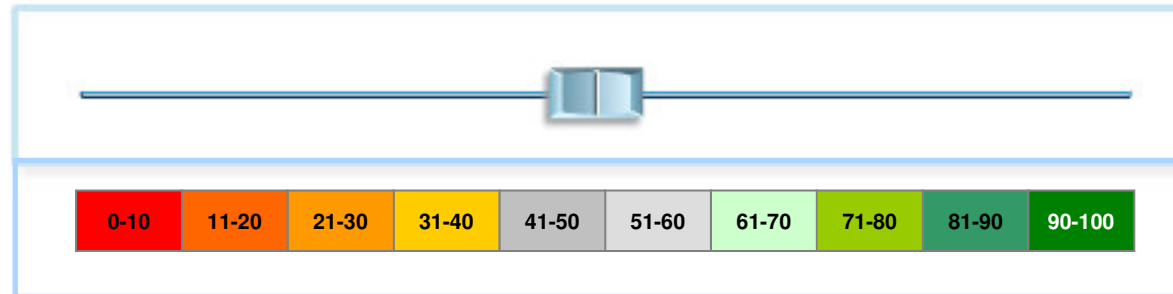


45.6

Statements ranked  
in order of suitability

# Suitability of Low Density Living

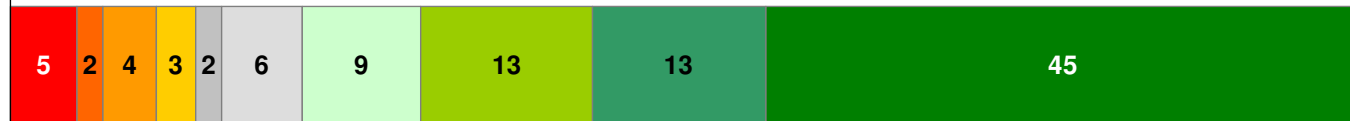
Not at all suited  
(0)



Very well suited  
(100)

Mean Score

My suburb or area



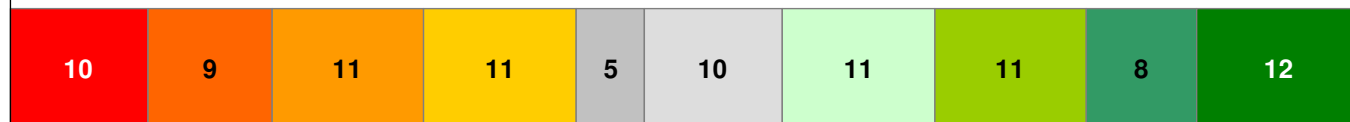
76.5

Other suburban areas



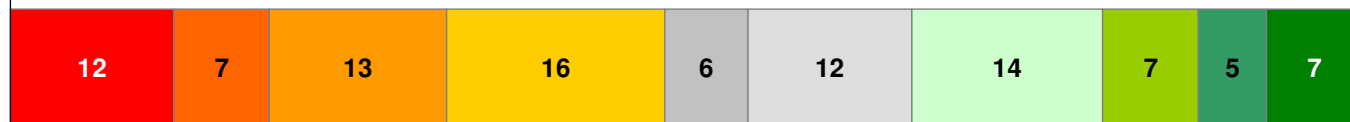
74.4

Major coastal tourism centres,  
such as Noosa, Coolumb, Surfers  
Paradise, Coolangatta



50.8

Major suburban centres with train  
stations or bus interchanges e.g.  
Indooroopilly, Garden City,  
Chermside, Maroochydore, Robina



45.9

The inner city of Brisbane, that  
is, within 5km of the CBD



21.6

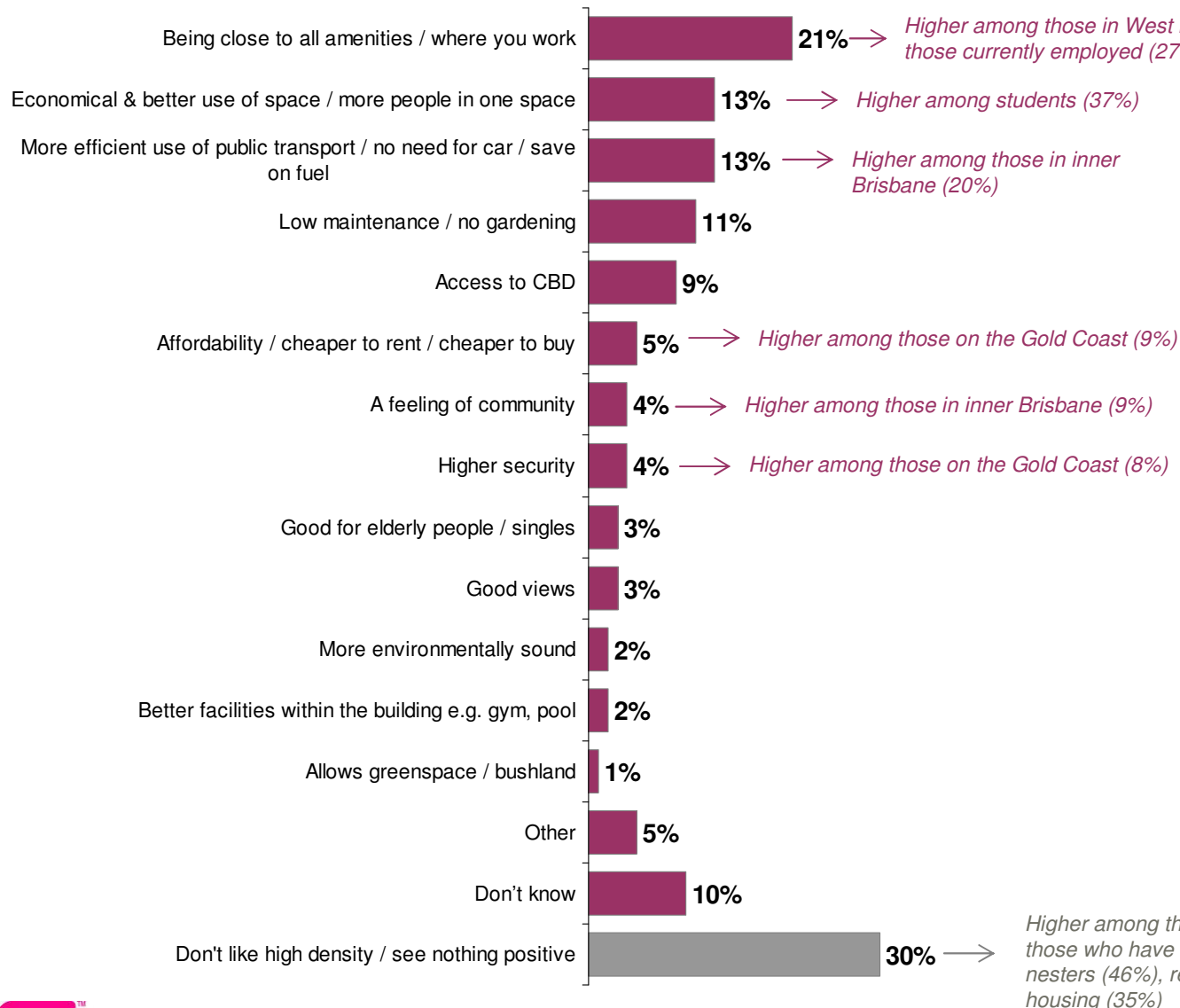
*Statements ranked  
in order of suitability*



81195 Growth Management Summit Report\_Final



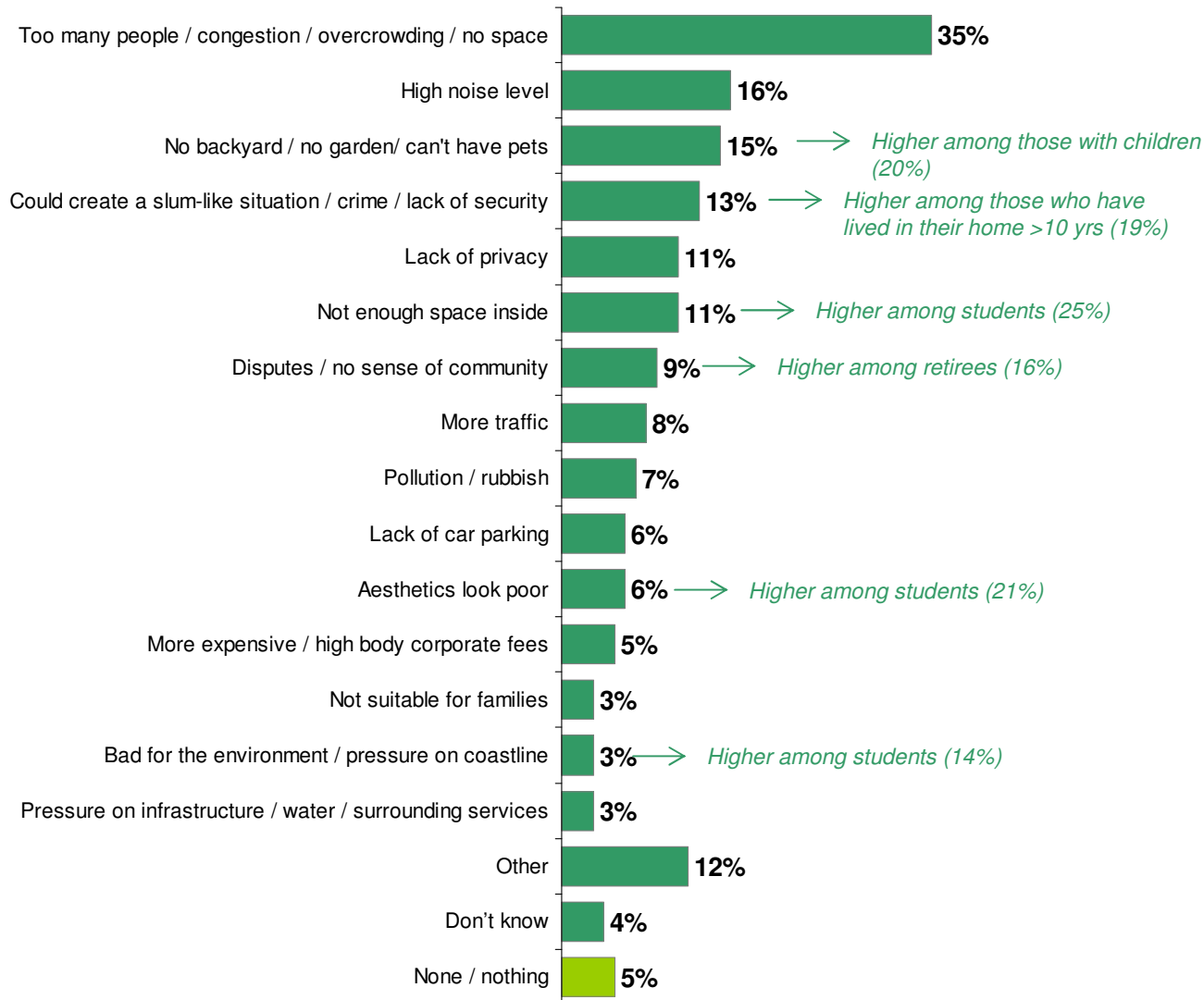
# Positive Aspects of Higher Density Living (Unprompted) – 2



- The most attractive aspect of higher density living is deemed to be the closeness to amenities and/or work.
- Better use of space, the ability to use public transport (and thus less reliance on cars) and low home maintenance / gardening were the most common other mentions of what people like, or would like, about living in higher density.
- Those currently living in high density areas appear to like the higher security aspect, although given the small base size this is indicative only.
- Spontaneously, however, three in ten SEQ residents stated that they do not like high density housing or could see nothing positive about it.

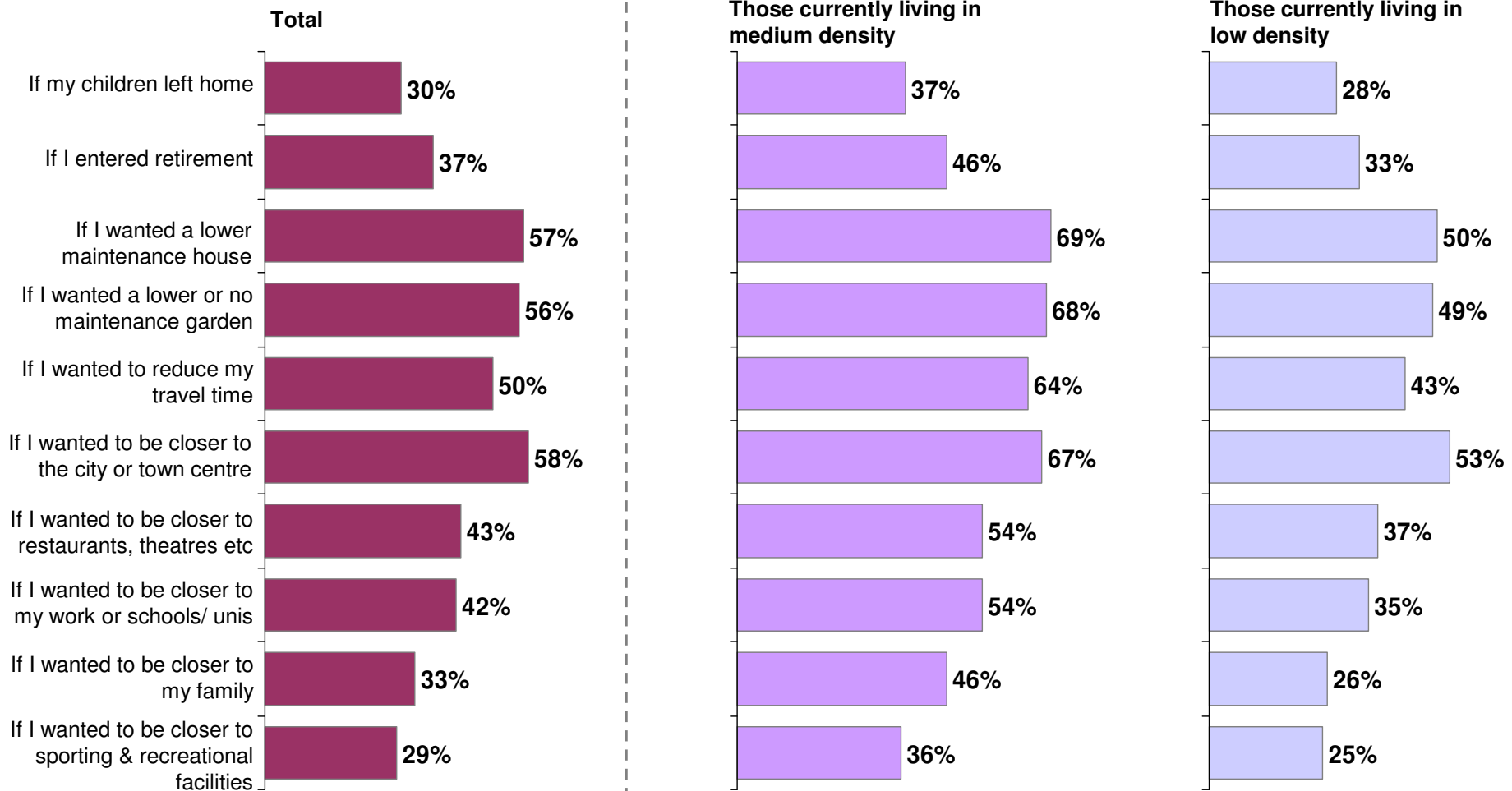


# Negative Aspects of Higher Density Living (Unprompted) – 2



- Feeling crowded and having no space to yourself is the least liked aspect of higher density living.
- While there is only a small base of people in the sample who currently live in high density, their top four negatives were overcrowding / not enough space, high noise levels, poor aesthetics and disputes / lacking a sense of community. They also appeared more negative than other people about a lack of parking.
- There were no real differences in mentions according to the region people currently live in.
- Students were more concerned than other people about poor aesthetics of high density housing, lack of space inside and the environment.

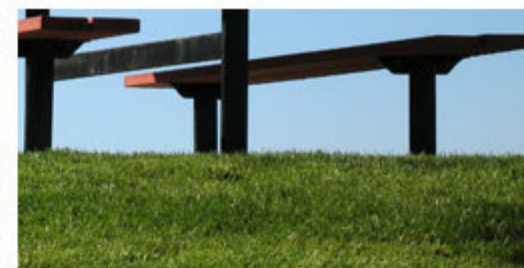
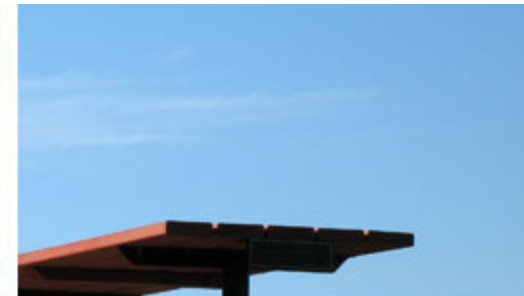
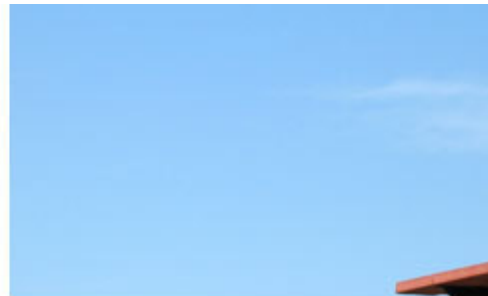
# Circumstances Under Which People Would Consider Higher Density Living



*NB. Those currently in medium density are significantly more likely than those in low density to consider higher density for all circumstances except for children leaving home*

Q7c. People choose to live in medium or high density housing for a variety of reasons, or due to changed circumstances in their lives such as those listed below. For each one please indicate whether you would consider moving to a higher density of housing than you currently live in. Base: Weighted: Those who currently live in low or medium density AND the situation applies to them. Base sizes vary for each statement.





# Community Preferences for Liveability Options

# Summary of Community Preferences for Liveability Options

- Respondents were shown a series of 'liveability' scenarios and in each case were asked to choose their preferred option out of the two provided. This was not a trade-off exercise - there were only ever two options compared at one time - hence some apparent contradictions in SEQ residents' preferences.
- Overall, South East Queensland residents prefer to (ranked by strength of preference):
  - Preserve green space, which will mean higher density in some areas (76%)
  - Live in lower density housing, even if it means having to live further out (69%)
  - Have higher density housing concentrated in certain areas (61%)
  - Have focus put on developing the public transport network rather than the road network (56%)
  - Spend less time commuting, which means decentralisation of retail, office and industry (54%)
    - Sunshine Coast residents have the reverse preference for this option – they prefer to keep shops, offices and industry away from where they live, even if it means more commuting time.
- There is no clear preference between a stronger economy from an increasing population base (45%) and lower population growth (44%).



The following paragraph introduced respondents to a set of 'liveability' options ...

*In order to accommodate more people in South East Queensland, there may be changes affecting lifestyle and housing choices. As the population grows, residents may need to make choices that were previously not necessary.*

*You will be shown a series of options. For each one please think about what it would mean for you personally, and choose your preferred option of the two.*

# Liveability Statement Preferences – 1

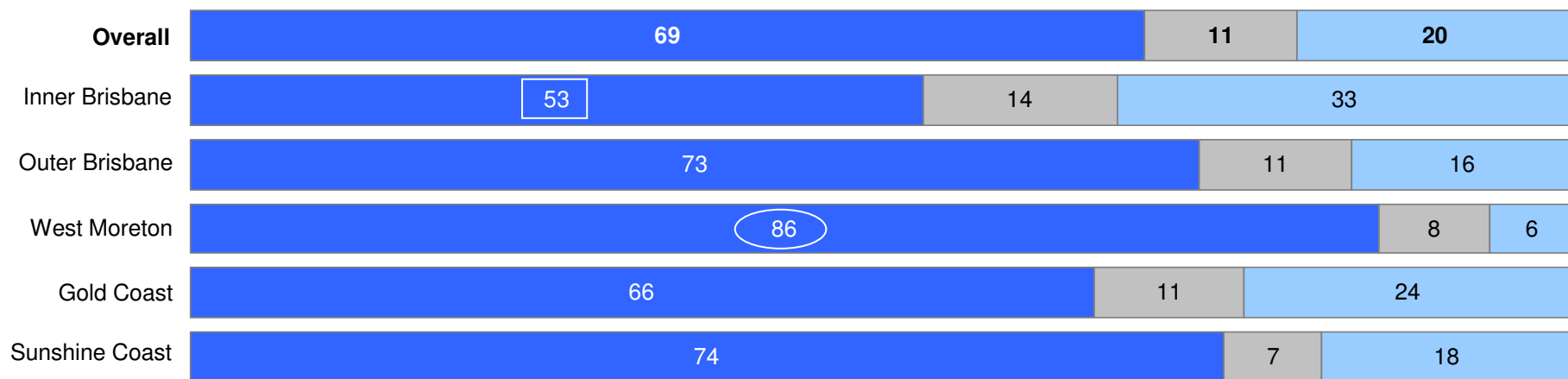
## Proximity vs Density



I'd prefer to live further out from the city or town centre if it means I can live on a larger property or in lower density housing

No preference

I'd prefer to live closer to the city or town centre even if it means living on a smaller property or in medium or higher density housing



- The clear preference (69%) is to live further out if it means lower density housing.
- This preference is higher still among:
  - those living in West Moreton (86%);
  - families with children at home (79%);
  - home owners (73%); and
  - current low density dwellers (77%).

# Liveability Statement Preferences – 2

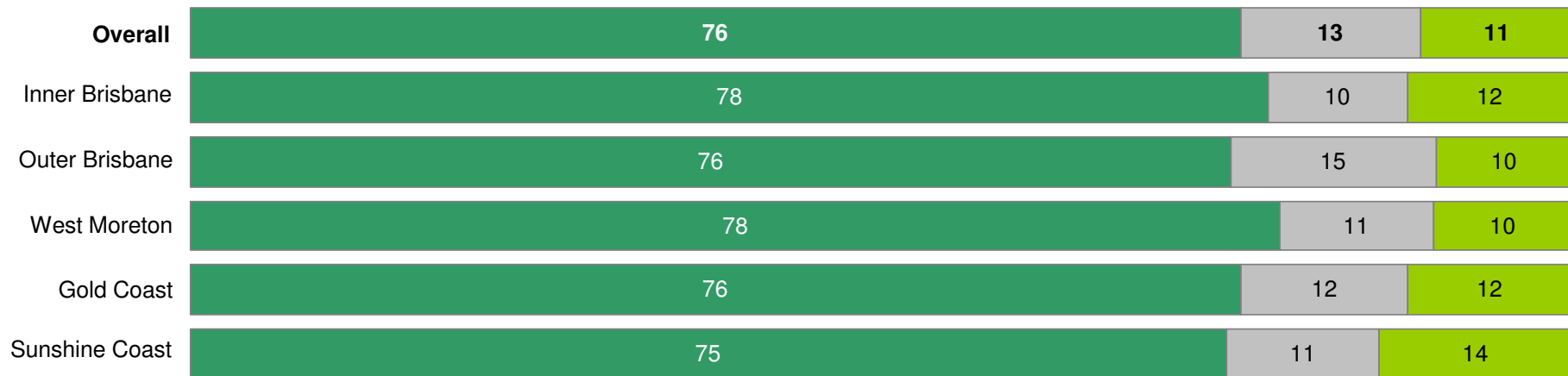
## Green Space vs Density



I'd prefer it if green space was preserved and building was done only in already developed areas which means higher density housing in some areas

No preference

I'd prefer it if there was less focus on preserving green space, and that building or development was considered in these areas in order to maintain lower density housing



- Across the board, at least three-quarters of South East Queensland residents prefer to preserve green space which will mean higher density in some areas.
- There are no differences within any demographic or regional sub-group.

# Liveability Statement Preferences – 3

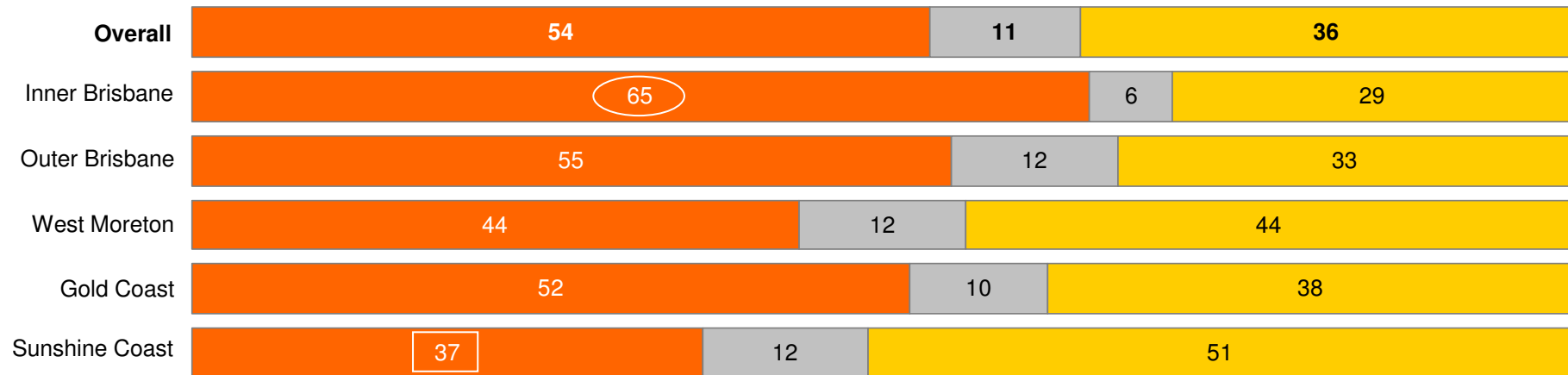
## Decentralisation vs Travel Time



I'd prefer a mix of shops, offices and industry close to where I live, if it means less commuting time

No preference

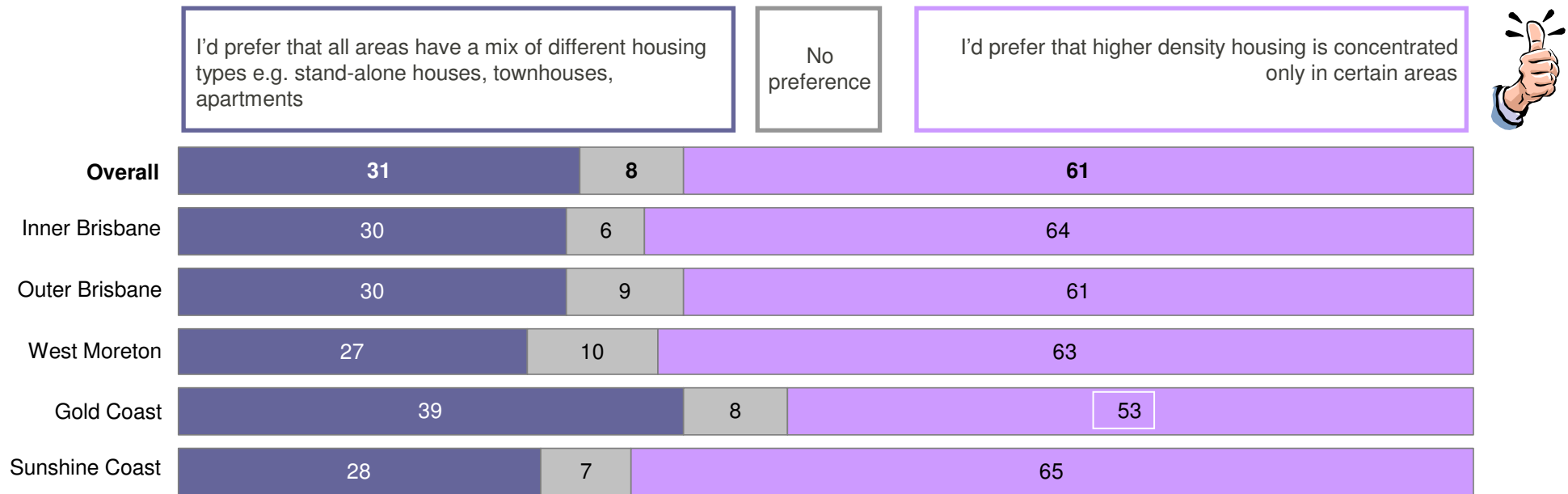
I'd prefer keeping shops, offices and industry away from where I live, even if it means more commuting time



- Less commuting time appears to be the preference, although in West Moreton there is no clear preference while on the Sunshine Coast the preference is to keep retail and industry away from residential areas (even if it means a longer commute).
- Younger people (under 35 years) have an even stronger preference for less commuting time (65%).
- There is a difference within 'outer Brisbane' residents between those who live within Brisbane City Council boundary and those who live in greater Brisbane. Those within the BCC boundary have a clear preference for less commuting time (62%) whereas there is no clear preference among greater Brisbane residents (49% preferred less commuting and 42% were happy to travel for longer).

# Liveability Statement Preferences – 4

## Mix of Density vs Pockets of High Density

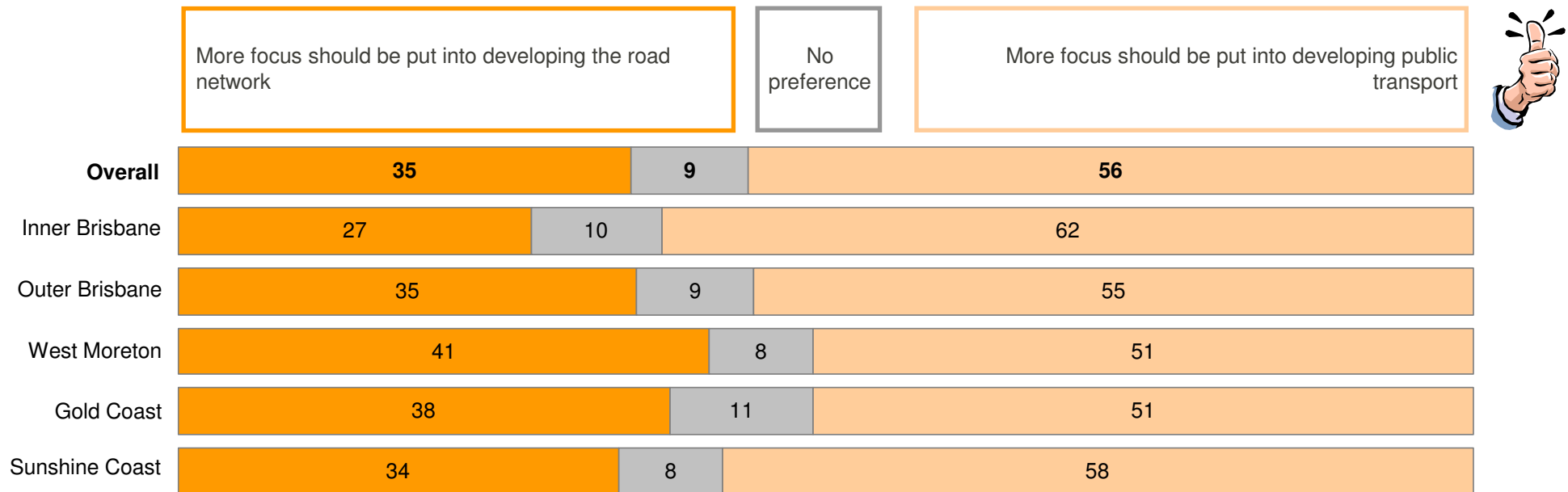


- A concentration of high density in certain areas is preferred over a mix of housing types across areas.
- Long term residents of South East Queensland (more than 10 years) have an even stronger preference for concentrating higher density in certain areas (65%), as do those currently living in low density suburbs (66%) or low density residences (67%).



# Liveability Statement Preferences – 5

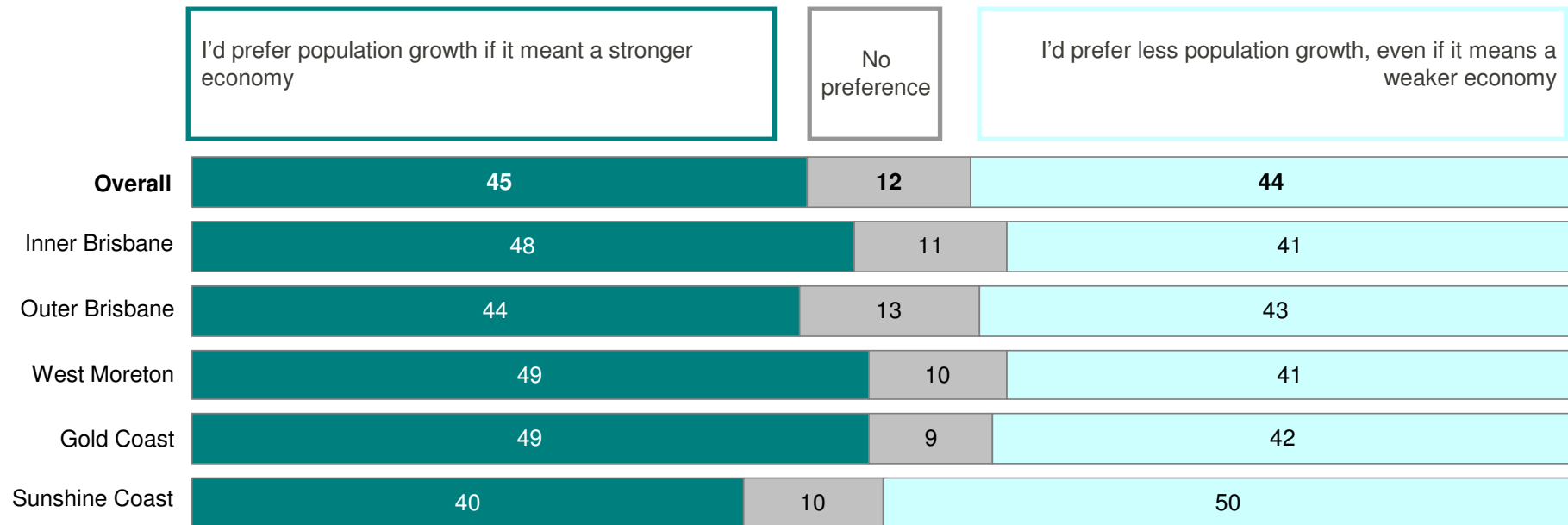
## Developing Road Network vs Public Transport



- There is a stronger preference for the development of public transport over the development of the road network.
- No real differences exist between demographic and regional sub-groups.

# Liveability Statement Preferences – 6

## Economic Growth vs Less Population Growth



**No clear preference**

- Preference here is polarised, with as many people favouring population growth for a stronger economy as those favouring less population growth even if it means a weaker economy.
- People currently living in low density suburbs (47%) and those who have lived in South East Queensland for more than 10 years (47%) have a slightly higher preference for less population growth over population growth (41% and 43% respectively).



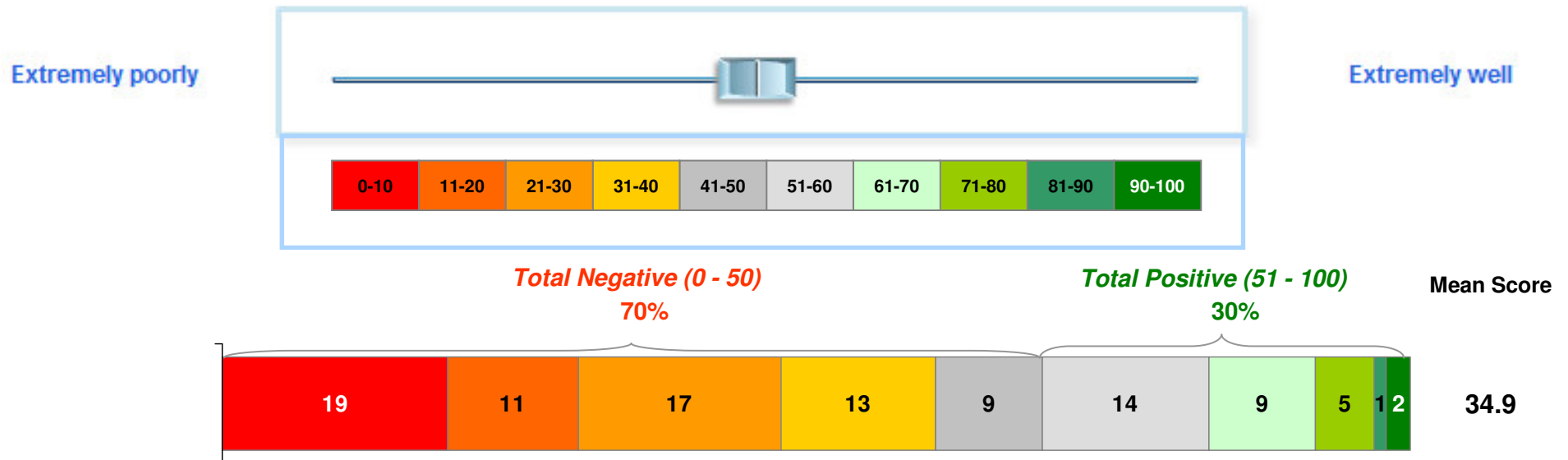
## Community Preferences for Engaging with Government on Population Growth

# Summary of Community Preferences for Engaging with Government on Population Growth

- Just under a third (30%) of residents rated the Queensland Government's current management of population growth in South East Queensland favourably, that is, gave a rating of 51 or higher on a scale of 0-100, where 0 is 'extremely poorly' and 100 is 'extremely well'. The average rating was 34.9.
- Ratings were significantly higher among inner Brisbane residents (mean score of 39.7) and significantly lower among Sunshine Coast residents (29.2).
- The community appears interested in being involved in planning for issues related to population growth – only 7% stated that they do not want any involvement.
- Two clear preferences for involvement are having a say through online surveys (41%) and accessing a website to provide feedback (34%). It should be noted that participants of this survey were sourced from an online panel, hence the popularity of online engagement methods, in particular online surveys, may be over-inflated.
- There are a number of other options that residents showed interest in, including: providing feedback via email; accessing updates online or in publications; providing feedback via local council; and attending a community information session in their area.

# Perceptions of Queensland Government's Management of Population Growth

The Queensland Government is currently managing population growth in South East Queensland ...

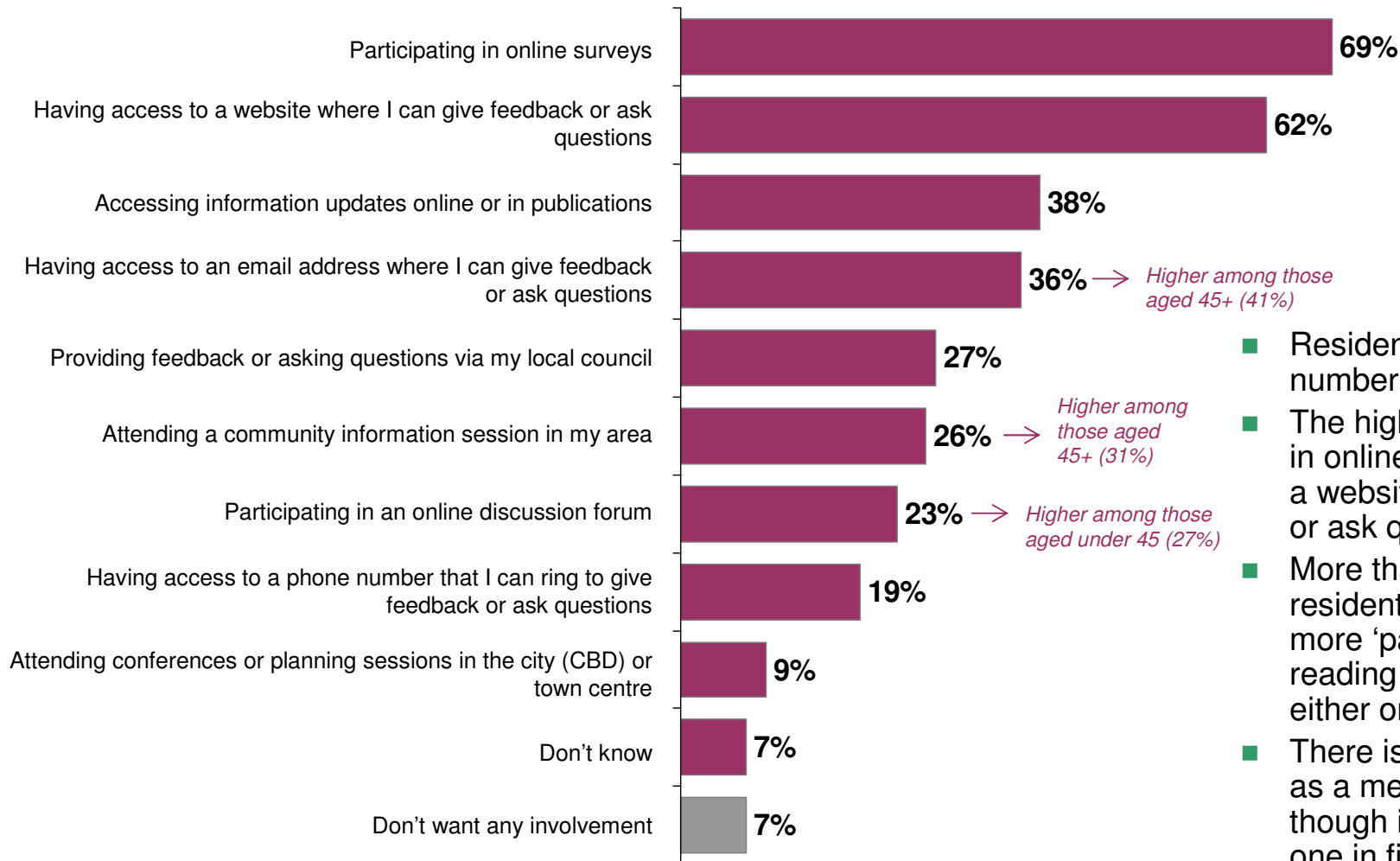


- Just three in ten residents rated the State Government's management of population growth in South East Queensland favourably i.e. a score of 51 or higher out of 100. Inner Brisbane residents were the most positive (42% gave a score of 51 or higher).
- Conversely, ratings were significantly lower for:
  - Sunshine Coast residents – 20% rated the Government's management favourably (mean score of 29.2)
  - Empty nesters – 17% rated it favourably (mean score of 25.5)
  - Long-term SEQ residents – 26% rated it favourably (mean score of 31.8)
  - Those living in low density suburbs – 27% rated it favourably (mean score of 33.0)

Inner Brisbane	39.7
Outer Brisbane	34.9
• BCC	35.9
• Greater Bris	33.8
West Moreton	34.2
Gold Coast	34.9
Sunshine Coast	29.2



# How the Community Wants to be Involved



- Residents indicated interest in a number of ways to be involved.
- The highest levels of interest lie in online surveys and accessing a website to provide feedback or ask questions.
- More than a third (38%) of residents showed interest in more 'passive' involvement – reading information updates either online or in publications.
- There is less interest in phoning as a means of involvement, though it was still chosen by one in five (19%) residents.

# Preferences for Involvement

- When asked for their ideal option for involvement, two clear preferences emerged:

Participating in online surveys	41%
Access to a website (to give feedback or ask questions)	34%

- Preferences mentioned by small proportions of people include:
  - Access to an email address (to give feedback or ask questions) 5%
  - Accessing information updates online or in publications 5%
  - Attending a community information session in a local area 4%
  - Providing feedback or asking questions via local council 3%
  - Attending planning sessions in the city or town centre 3%
  - Participating in an online discussion forum 2%
  - Access to a phone number (to give feedback or ask questions) 2%
  - Other 1%



## Conclusions and Implications

# South East Queensland Priorities for Safe-Guarding

- 1) What makes South East Queensland a preferred place to live?
- 2) What are the community 'must-haves' which need to be safe-guarded in the future?

- South East Queensland has a variety of qualities which make it an attractive place to live. From a top of mind perspective, the things residents say they value about the region are mostly related to 'liveability'.
- While residents agree that South East Queensland has fantastic weather, access to great beaches and plenty of green space, there are other factors that are shown to be more important in influencing residents' overall enjoyment and quality of life in South East Queensland. Therefore, it is the following factors which can be considered priorities for safe-guarding into the future.

Safety in own homes

Sense of community

Safety in the local community

Clean, pollution free air

Ease of getting around

Reasonable cost of living

Great education system

Character of housing

Laid back lifestyle

Range of flora and fauna

- Any changes in residents' perceptions of these factors will have the biggest flow-on effect in terms of changing overall quality of life and enjoyment perceptions.
  - Safety (in homes and in the community) and sense of community are the factors with the highest relative impact, marginally higher than the other factors.
- In line with having an outdoors culture, the waterways and marine life of rivers, bays and coastlines around the region play an important role and also need to be protected as the population grows.

# Overall Perceptions of Population Growth

## 3) Is growth viewed favourably or unfavourably?

- Opinion about population growth is polarised, but the balance is currently more unfavourable.
- On an unprompted basis, residents speak of their concerns about congestion, strain on infrastructure, strain on public transport, strain on health services, competition for jobs, crowding and housing affordability.
- It is likely that some of the negativity stems from people thinking of the current infrastructure and services catering for a larger population, and not how these would need to change with population growth.
  - A minority of residents, however, are optimistic that population growth will bring with it improved public transport and road networks and better health and education systems.

*"Obviously huge changes would need to be introduced to deal with the population growing. I basically think that it would be great to have a larger population provided the necessary changes were implemented."*

- It will be important for the government to acknowledge residents' concerns and reassure them that expansion / upgrade of current infrastructure is fundamental to support a growing population.
- Residents can see the economic benefits of population growth, particularly job opportunities and businesses prosperity. Shopping and entertainment options as well as cultural experiences are also expected to change for the better with a growing population.



# Key Influences on Views of Population Growth

## 4) What is likely to influence these views / what might make their views more positive?

- Key influences on residents' views of whether population growth will be a good or a bad thing for South East Queensland are primarily related to:

- *Sustainability*

Health of waterways/ marine life

Air quality

Water supply

- *and Housing*

Housing density

Housing availability

Housing affordability

- Therefore, residents' views are likely to be most positively influenced by being informed of strategies or plans in place to manage these things listed above.
- Furthermore, information and education around how the following will be managed should also impact residents' views positively:
  - Safety in the local community – a priority for safe-guarding given it is so strongly related to quality of life and enjoyment of living in South East Queensland, and is something residents feel could be compromised by population growth.
  - How current services and infrastructure will be changing in line with a growing population.
  - Management of green space – while not shown to impact significantly on residents' current overall enjoyment of life in SEQ, it will become an important issue if green space is diminished due to population growth.
- It will be important to reinforce the economic benefits as well as other benefits that a growing population will bring in terms of enriched cultural, shopping and entertainment options.

# Liveability Preferences

## 5) What are community preferences for future liveability options?

- The majority of South East Queensland residents currently live in low or medium density, but it is seen as inevitable that population growth will bring with it higher density living. However, high density living is not likely to be accepted in the suburbs. Preserving green space is important to SEQ residents, suggesting that residents would like to see urban sprawl minimised. Therefore, high density living is seen to be best suited to the inner city and to a lesser extent major centres with public transport hubs.
  - The Brisbane City Council's recently announced plans to increase density (up to 30 storeys) in Milton and Fortitude Valley<sup>1</sup> are in line with what residents would expect in terms of the location for high density housing.

*"I do not like high density living, but see the need for it in major built up areas."*
- Findings from this study support the NIMBY principle and what we have learned from other research on this topic – residents accept that high density housing is necessary ... so long as it is 'not in my backyard'.
  - High density living conjures up images of crowding, lack of space and privacy, noisy neighbours and importantly, concerns about security.
  - Long-term SEQ residents who have well established lifestyles will not be easily convinced about high density living and will be reluctant to change their lifestyle in such a way.

*'[Positives of high density] Maybe proximity to services such as medical, transport, shops or even to the workplace. Me, I prefer to live in the country and could not envisage 'crowded' living.'*
  - It may therefore be more practical for efforts to be put into encouraging residents moving into SEQ, particularly younger people, to consider high and medium density living.
    - The attractiveness of higher density living is proximity to work, access to amenities, less reliance on private vehicles (so long as the public transport system supports this) and low maintenance.

*"Provided adequate facilities and infrastructure are in place, can be vibrant community lifestyle."*

# Preferences for Engaging with Government on Population Growth

## 6) What are community preferences for engaging with government on population growth?

- South East Queenslanders are passionate about where they live, and are keen to be involved in planning for the future of the region, and specifically their local community.

*"For the government to actually listen to the feedback and requests of the public rather than telling us what we need."*

- Residents are open to various methods of engagement with government.
- Online options are popular given an ever increasing penetration of online access as well as familiarity with, and use of, the internet amongst all age groups.
  - Publicising details of an online website where people can access updates on population growth planning and where they can ask questions or provide feedback is likely to be well received. Online surveys and online discussion forums could also be considered either via this same website or through alternative means.
- More locally, residents could be encouraged to ask questions or provide feedback about their particular suburb and neighbouring suburbs through their local councils or to attend community information sessions in their local area.

## A note about Sunshine Coast residents ...

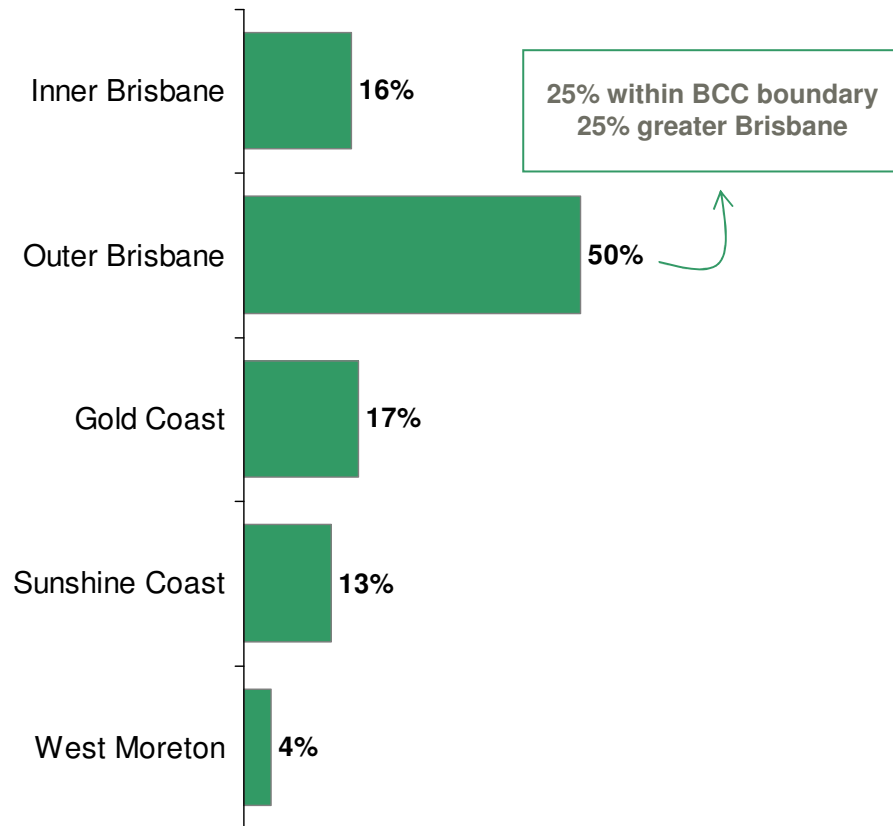
- For residents of the Sunshine Coast, their choice to live where they do really is about the 'lifestyle'. They rated their quality of life higher than residents of other locations and had the highest ratings in terms of their enjoyment living in the region.
- Sunshine Coast residents are happy to live further away and don't want shops, offices and industry close to where they live. They are not fans of high density living.
- These residents are particularly against population growth, and were the group most likely to bring up population growth spontaneously, before it was even introduced in the survey.
  - ★ "I'd like the population of the Sunshine Coast capped. People are flocking to this area and we need to preserve our fairly green environment from becoming the urban nightmare that exists on the Gold Coast."
  - ★ "No high rises on the Sunshine Coast. [I value it being] Not majorly overpopulated."
  - ★ "Sunshine Coast kept separate from Brisbane (don't want development all the way)."
  - ★ "I would like to see a population cap, particularly on the Sunshine Coast where the infrastructure isn't in place for greater population growth."
  - ★ "Not to capitalize the Sunshine Coast, please don't turn it into a metropolis like the Gold Coast."
  - ★ "There's still a lot of open space on the Sunshine Coast, it would be nice if it stayed that way so my kids can enjoy it too."
- As such, a different strategy may be required in the planning for population growth in this region.



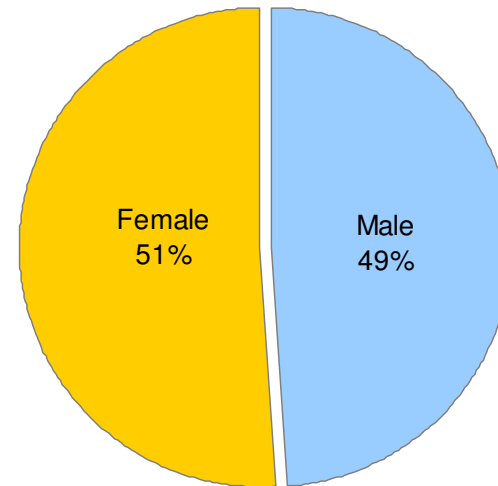
# Appendix: Sample Profile

# Location, Gender and Age

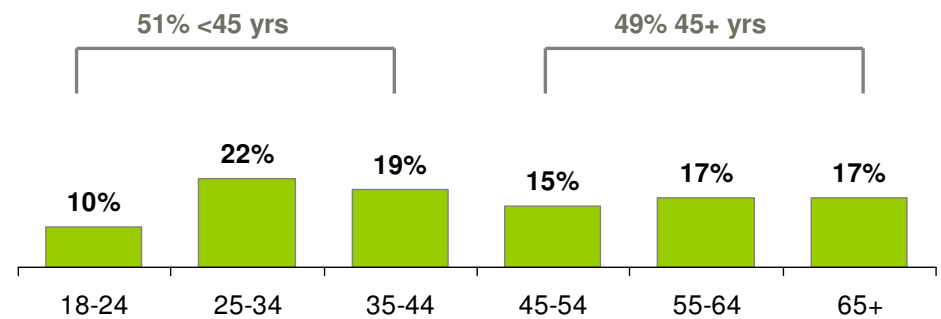
Location (%)



Gender (%)



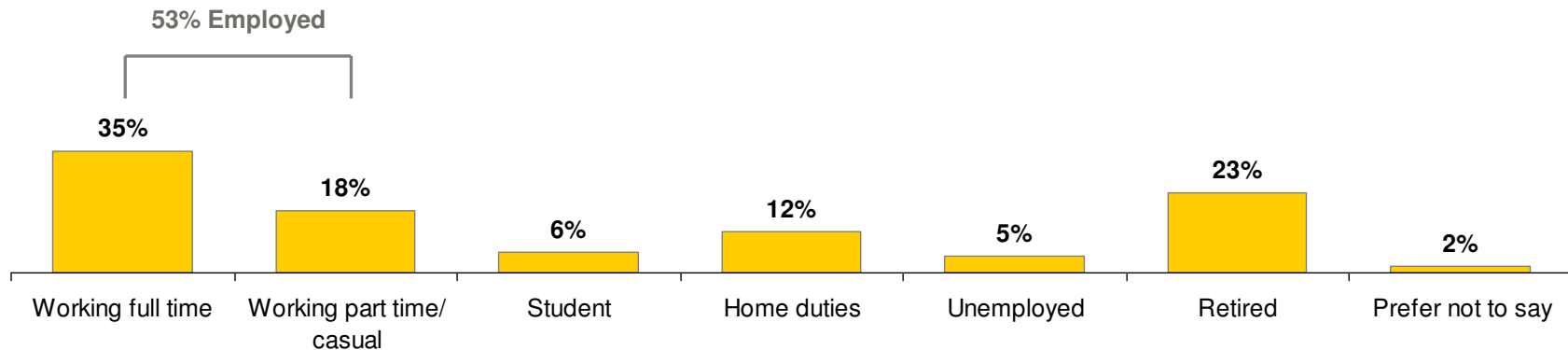
Age (%)



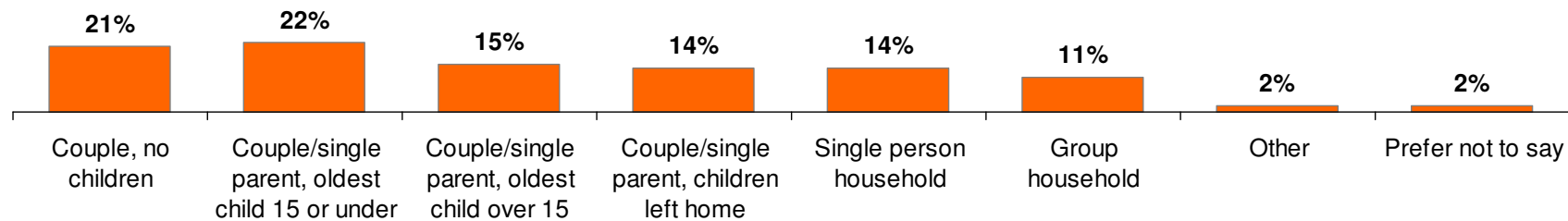


# Employment Status, Household Structure

## Employment status (%)

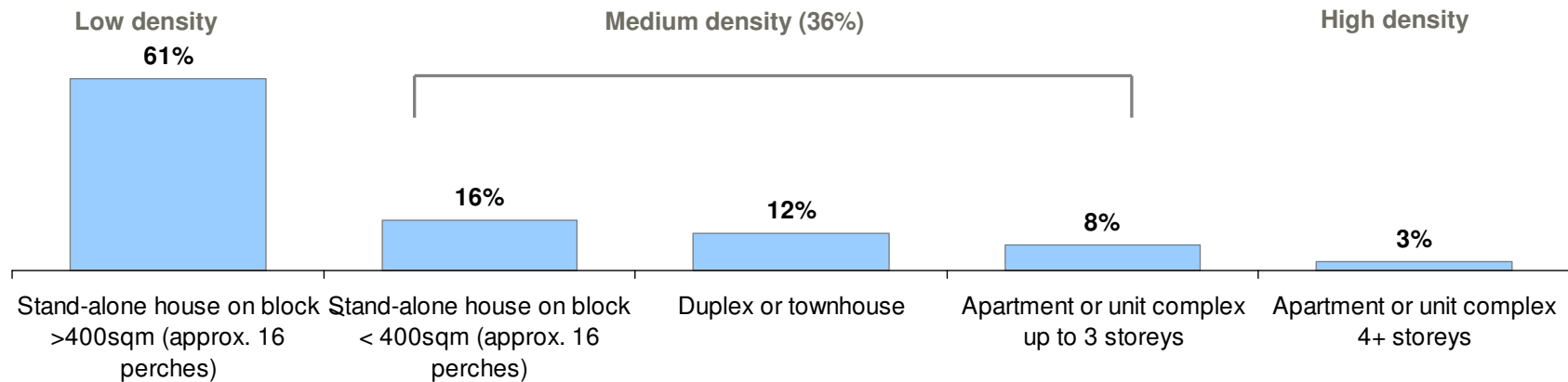


## Household structure (%)

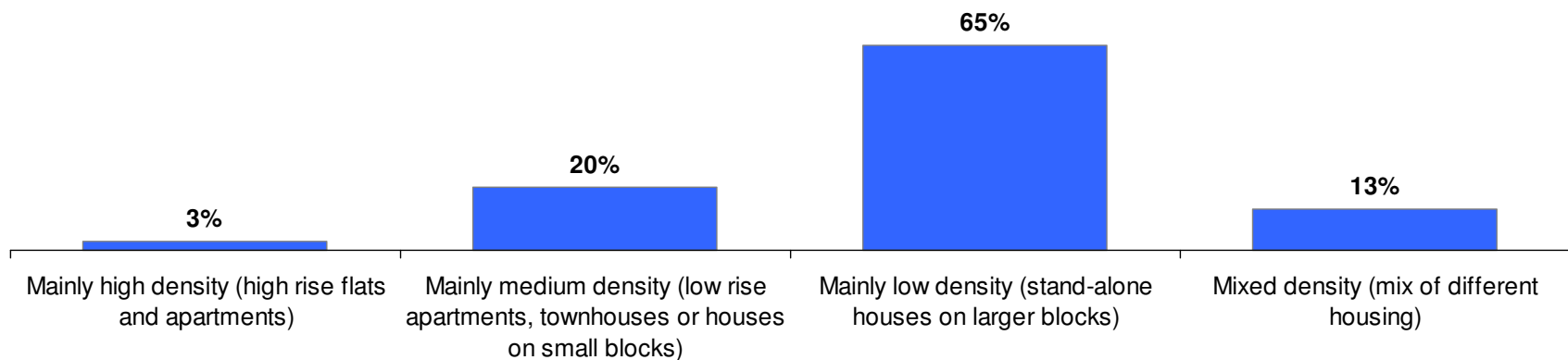


# Type of Home, Housing Density of Suburb

## Type of home (%)

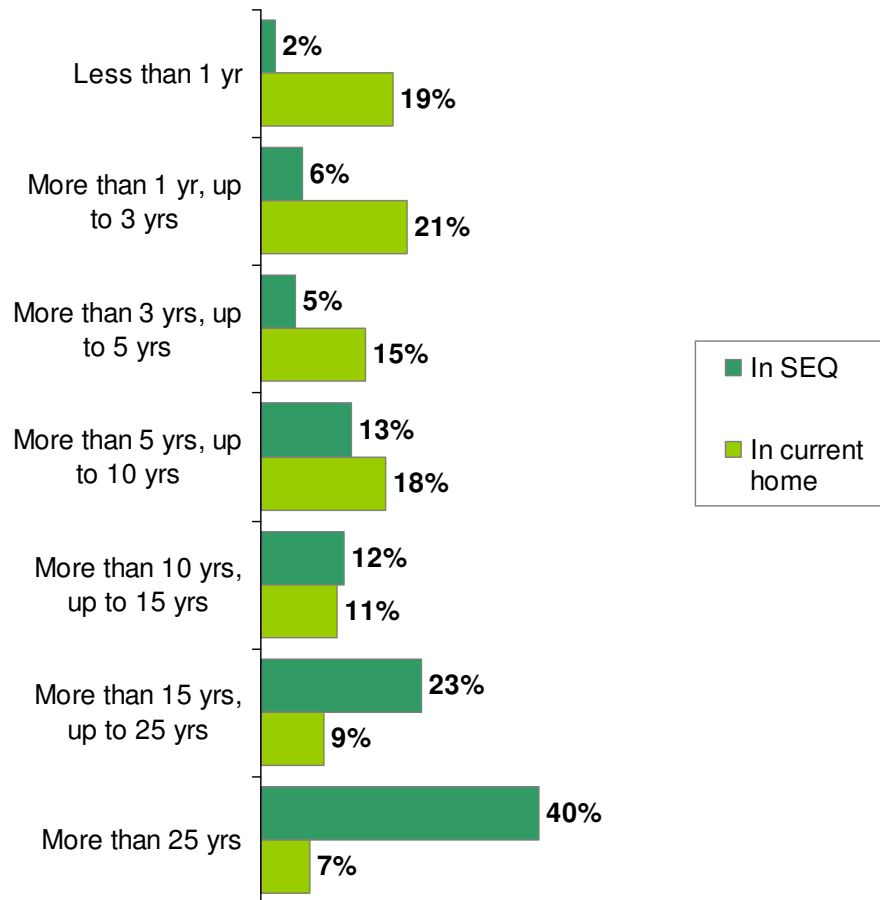


## Housing density of suburb (%)

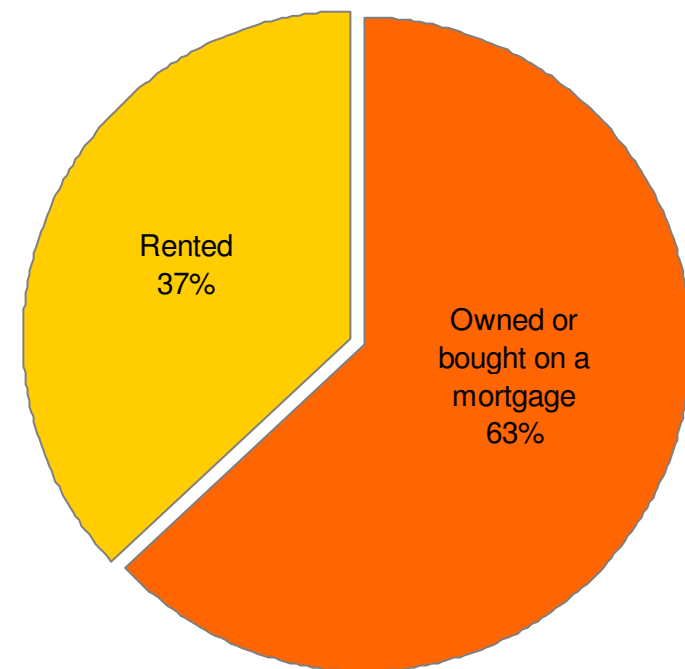


# Time in SEQ and Current Home, Own or Rent

Length of residence in SEQ (%)



Whether home is owned or rented (%)





Please note that the data contained in this report has been prepared for the specific purpose of addressing the items contained in the project contract between **TNS Australia** and the **Department of the Premier and Cabinet**. It may not be suitable for other applications. The use of this data for any other purpose should be discussed with the lead author. TNS accepts no responsibility for unauthorised use of this data by a third party.



social research

