

WHAT PERTH WANTS

DECEMBER 2014



Exciting,
sustainable
lifestyles.



EXECUTIVE SUMMARY

This research was commissioned by the Conservation Council of Western Australia and multi-residential property developer Psaros, working in partnership with the Property Council of Australia.

The research was conducted to understand community attitudes towards housing choice and the future development of Perth city and its surrounds.

The research shows that Perth residents are ready to embrace change and development that will deliver a more environmentally sustainable, more affordable and more liveable city.

The research shows that the preferences of Perth residents for housing type and for the future of the city are changing. The historical desire for large blocks and stand-alone housing no longer dominates housing choice in Perth. Instead, a growing majority of Perth residents are ready to embrace the benefits of apartment-style living in affordable and eco-friendly developments, especially around transport nodes.

The research also points to a significant shift in Perth resident's relationship to the motor car. There is a high level of concern among Perth residents about traffic congestion, and a very strong demand for more sustainable and active transport options. Increased public transport was identified as the number one priority for Perth, with improved cycle lanes also among the top three priorities for residents.

The research also examined attitudes towards policies and planning that would guide Perth's future development. This identified growing community support for more flexible planning to allow a mix of different and innovative development types. There is also strong support for relaxing building height limits for eco-friendly buildings and for developments around transport nodes.

A number of conclusions can be drawn from this research to inform policy makers, planners and local government authorities. The research challenges assumptions about the preferences of residents that may be holding back planning and policy decisions. It is clear that while individual vocal opposition to particular developments will remain, the growing majority of Perth residents are ready to embrace the development that is needed to make Perth a more sustainable city. Community support for increased height and density is particularly strong for eco-friendly developments and for areas around transport nodes.

RESEARCH METHOD



The research was undertaken by leading social research provider Ipsos during June and July 2014.

542 respondents living within 10km range of the Perth CBD, including its inner urban suburbs, participated in an online research panel for the quantitative research stage. This was followed by a qualitative research stage involving focus groups selected from within the group of research panel respondents. The sample size of n=542 meets the Western Australian Auditor General's recommended guidelines of a 5% standard error at the 95% confidence level. Data has been weighted to reflect ABS age and gender statistics for the Perth Metro area.



KEY FINDINGS

There is very strong support for more medium & higher density apartment-style developments around transport hubs (71% support) and in inner areas (68% support).

The top three priorities for Perth's future are;

- an increase in public transport (train, light rail, buses) (95% support)
- more eco-friendly buildings that generate their own power, collect rainwater and use less energy (89% support)
- well-designed, safer bike paths to get to work and other places (86% support)

The most appropriate housing types for Perth city are:

- a mix of mid-sized apartments, townhouses & retail / cafés (like Leederville and Northbridge) (79% support)
- a mix of high-rise, town houses and parks (Like South Perth) (71% support)

Over half of residents (55%) would support increased building height limits to allow for higher density around transport links and 50% would support relaxing building height limits if developments are eco-friendly.

The majority of respondents (73%) do not believe that the benefits of a separate house and garden outweigh the benefits of inner city living.

The majority of respondents (69%) do not consider low density living in detached single housing to be a more affordable option.

Perceived benefits of apartment living include:

- easier to maintain (71% agree, 8% disagree)
- reduce the need for land clearing (70% agree, 8% disagree)
- lower environmental impact than detached housing (54% agree, 17% disagree)
- save on energy costs (44% agree, 15% disagree)
- save on car running costs (42% agree, 23% disagree)

3 in 5 inner city residents are likely to move house in the next 5 years; 73% would consider living in medium density housing and 50% in higher density housing.



RESEARCH PARTNERS

CONSERVATION COUNCIL OF WESTERN AUSTRALIA

The Conservation Council of WA (CCWA) is the State's peak community-based conservation and sustainability organisation. The Council's advocates for the protection the WA environment and works to support a sustainable future for WA communities.

"This ground-breaking research dispels some deeply-held myths that have been holding Perth back from becoming more sustainable, more affordable and more liveable. It is particularly pleasing to see that the top three priorities for Perth residents – public transport, eco-friendly buildings and cycle lanes - would all make a big difference to reducing the environmental impact of our City."

In addition, there is much stronger community support for increased density than planners and Local Councils might think. This is great news for our environment. For every sustainable apartment that is built, less energy is used, less waste is created, less natural bushland is destroyed and less traffic is on our roads."

Piers Verstegen, Director, CCWA

THE PROPERTY COUNCIL OF AUSTRALIA

The Property Council of Australia is the leading advocate for Australia's property industry and the built environment. Its members represent the broad spectrum of businesses that own property, property developers, building managers and property industry service providers.

"The property sector has an enormous role to play in the creation of a sustainable future. With the right planning and policy support from state and local government, we will be able to create a built environment that caters for the needs and wants of the current and future Perth community. Developers are ready to support increased infill housing and this research demonstrates that the community is ready too."

Joe Lenzo, Executive Director, Property Council of Australia

PSAROS

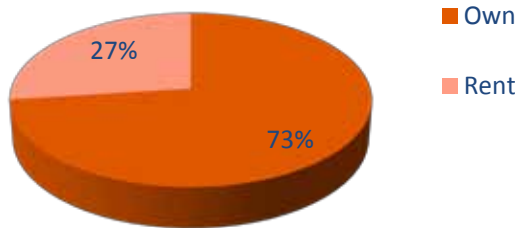
Psaros is a multi-award winning mid-tier Western Australian property developer leading in the construction of environmentally sustainable apartment buildings. With a 30- year track record, Psaros has delivered over 700 apartments in Perth, with an additional 350 new apartments under construction and a further 650 in various stages of approval.

"These findings reaffirm the decision made by Psaros to become a market leader in providing better performing and more sustainable apartments and multi-res developments in Perth. For Psaros, quality is no longer measured by granite bench tops and shiny finishes but by the long-term sustainability for the whole community – that means more comfortable, more affordable places to live that have lower ecological footprints. The importance for doing so has been recognised by National and International Awards received for Sustainability Leadership both in business and in construction this year."

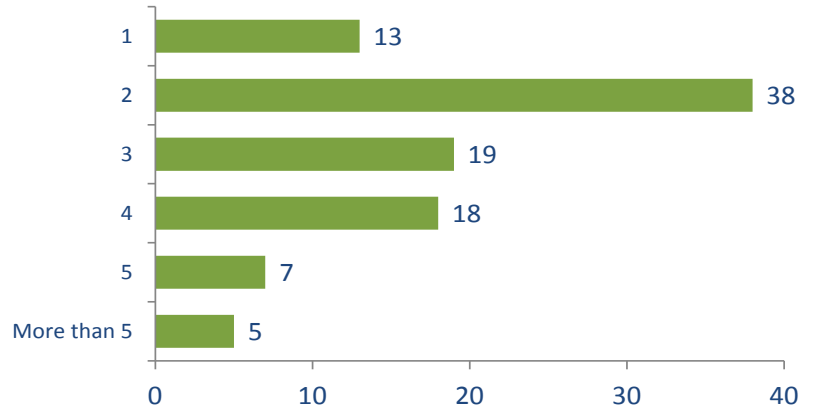
Chiara Pacifici, Head of Sustainability, Psaros

DEMOGRAPHICS OF RESPONDENTS

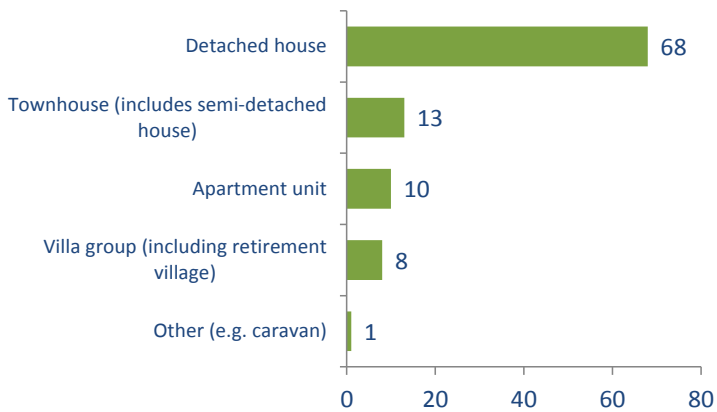
Own or Rent property



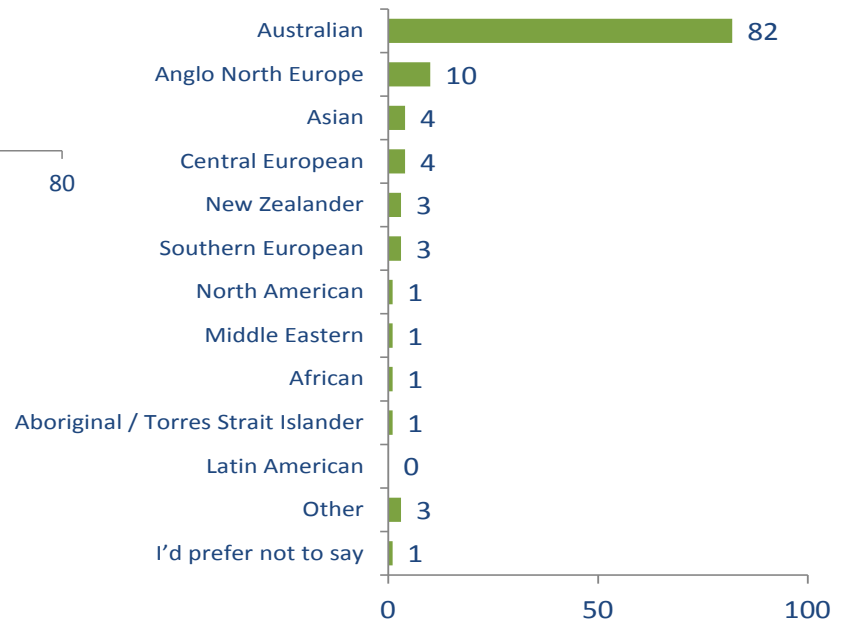
Number of people in house



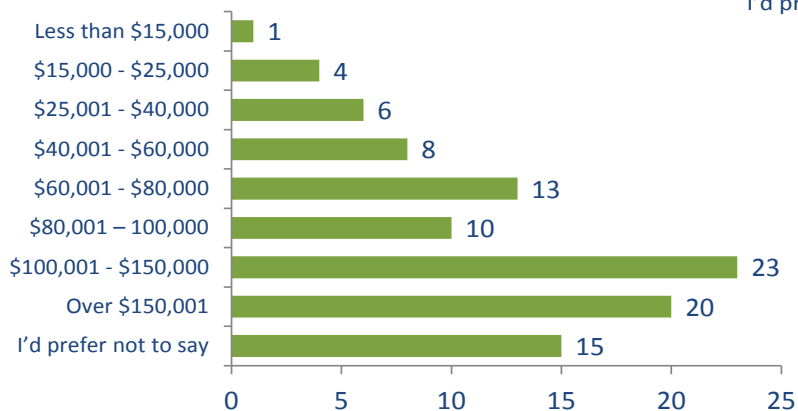
Type of house



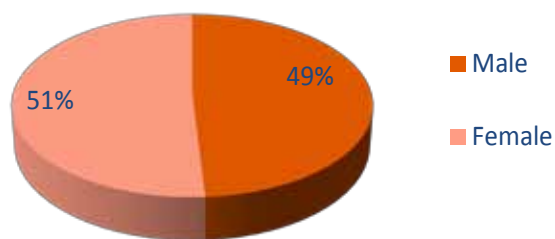
Ethnic Background



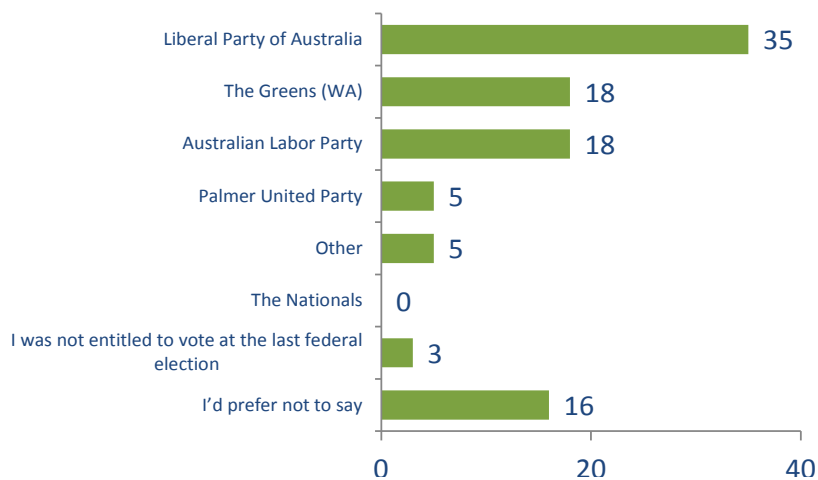
Household Income



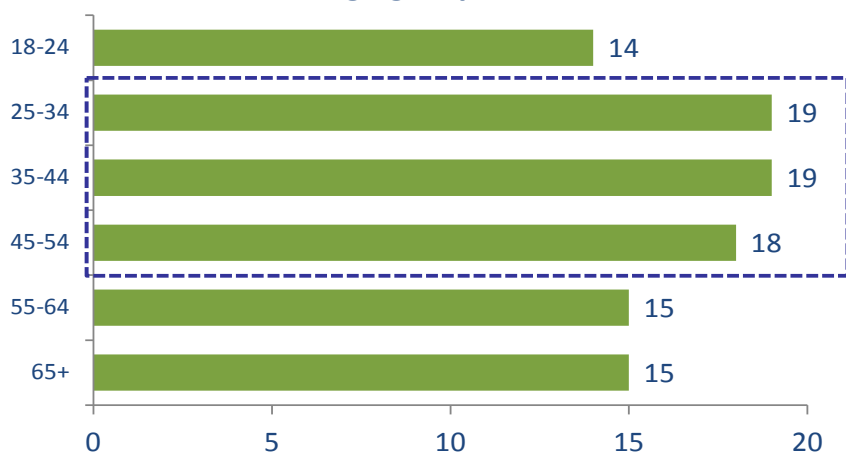
Gender



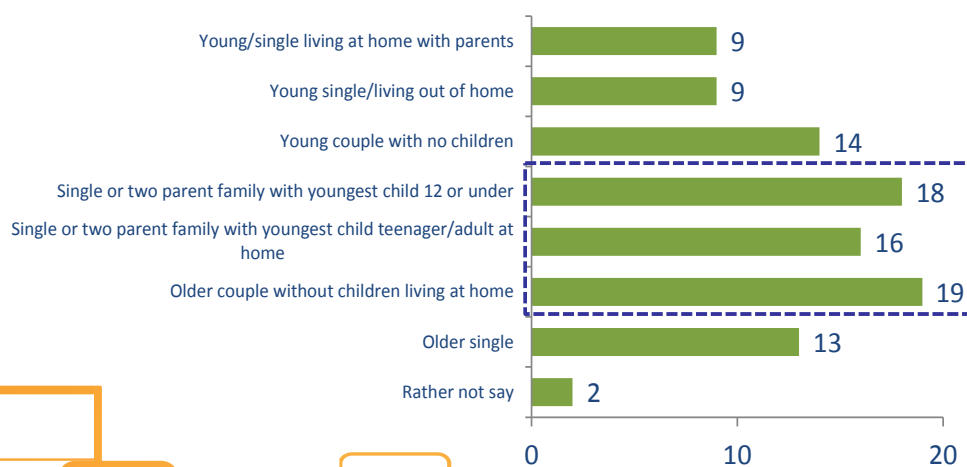
Party voted for in the last federal election



Age groups

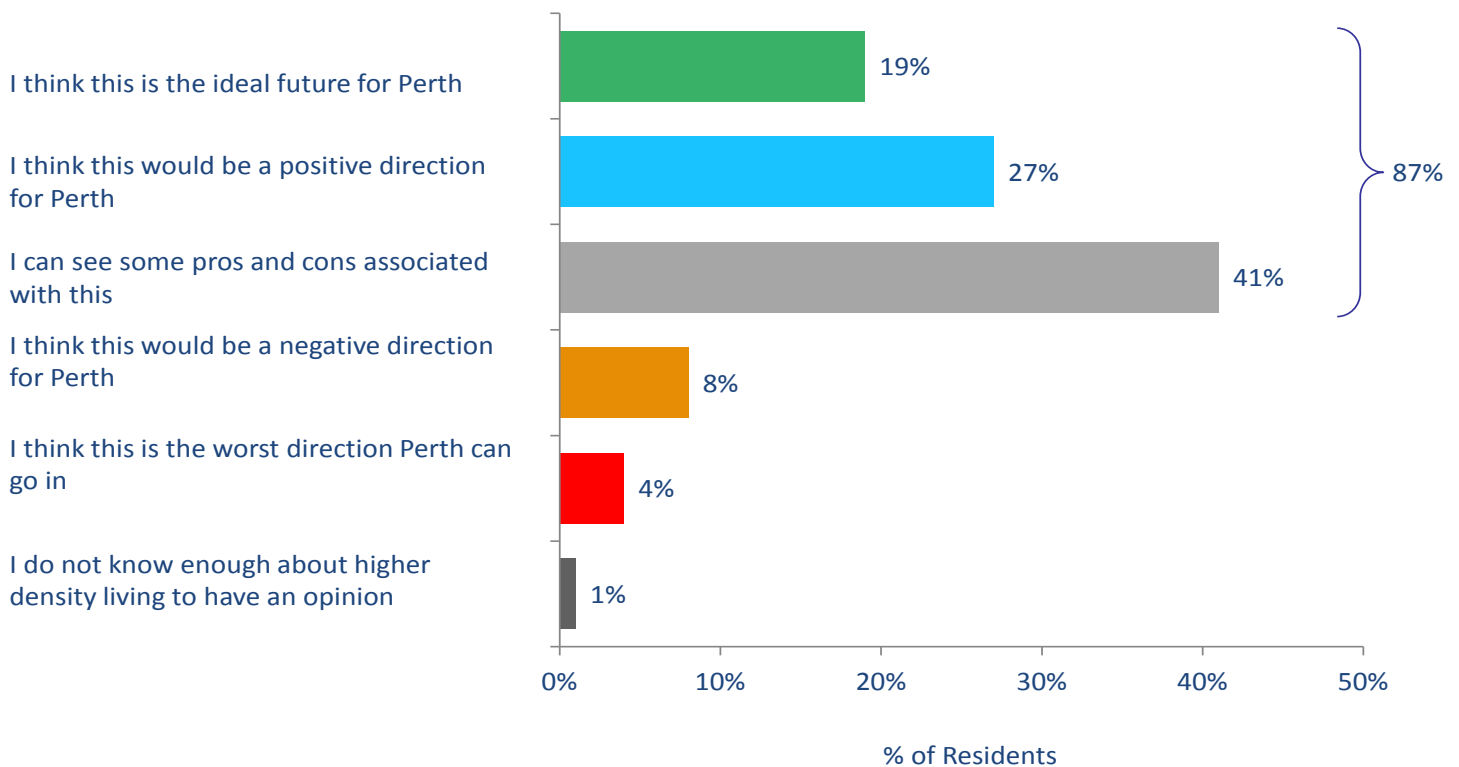


Lifestage



ATTITUDES TOWARDS HIGHER DENSITY LIVING

In light of Perth's increasing population, to what extent do you support the idea of higher density living in Perth city (including its inner suburbs within 10km of the CBD)?



Attitudes lean towards the positive side of the scale with 87% seeing at least some pros associated with higher density living in Perth city.

What are the main reasons behind your support for higher density living in Perth city?

"We should use our city more and this may be a way of bringing Perth to life."

"It allows better transport infrastructure, and a more vibrant city centre."

"Potential for cheaper housing close to the city, lower impact on environment, better use of space."

"Less need to build infrastructure to sprawling outer suburbs. Better use of existing infrastructure. Better use of public transport. Good for workers who work in CBD."

What are some of the pros and cons you see associated with higher density living in Perth city?

"Pros are more people in the CBD creating a vibrant city..."

"Less privacy"

“Good for couples and singles, especially first home owners...”

...but not ideal
for families"

"It would solve transport issues to live closer and keep costs of this down"

"Will detract from what makes Perth a unique city. Traffic congestion would be worse"

"It's cheaper to be nearer "life" (pubs/clubs/entertainment for the young and young of heart), and potentially less use of car required.

FURTHER INFORMATION REQUIRED

What further information do you need to form an opinion about higher density in Perth city?

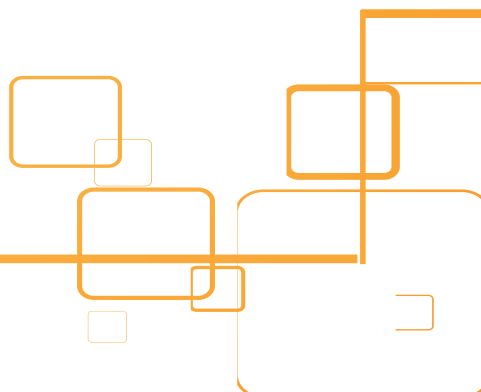
"The environmental and social costs, the way it effects homeowners in the area"

"The implications/workings of infrastructure & facilities required... if it would impact on those things that outer suburbia have now and in the future?"

"The rate that density is increasing in relation to time period. What parts of the community it will put pressure on. How increasing the average house size will influence the environment. Who exactly it will benefit.

"What would the crime rate be...would this be suitable for young family's?"

A word cloud of terms related to the impact of the pandemic on the housing market. The most prominent words are 'increasing' and 'impact' in large blue font. Other significant words include 'rate', 'implications/workings', 'attention', 'environmental', 'suburbia', 'benefit', 'young', 'future', 'parts', 'think', 'things', 'suitable', 'average', 'units', 'exactly', 'ill', 'families', 'community', 'infrastructure', 'homeowners', 'perth', 'facilities', 'costs', 'relation', 'plus', 'social', 'crime', 'outer', 'house', 'period', 'put', 'influence', 'way', 'know', 'now', 'required', 'none', 'environment', 'pressure', 'area', 'time', 'many', 'size', 'media', 'cons', 'density', 'pros', 'highlighting', 'period', 'put', 'house', 'crime', 'outer', 'house', 'crime', 'outer', 'house', 'crime', 'outer'. The words are in various colors (blue, green, purple, orange, red) and sizes, arranged in a circular pattern.



THE FUTURE DIRECTION OF PERTH

Below are a series of statements describing possible future directions for Perth city. How appealing is each of these statements for Perth's future?

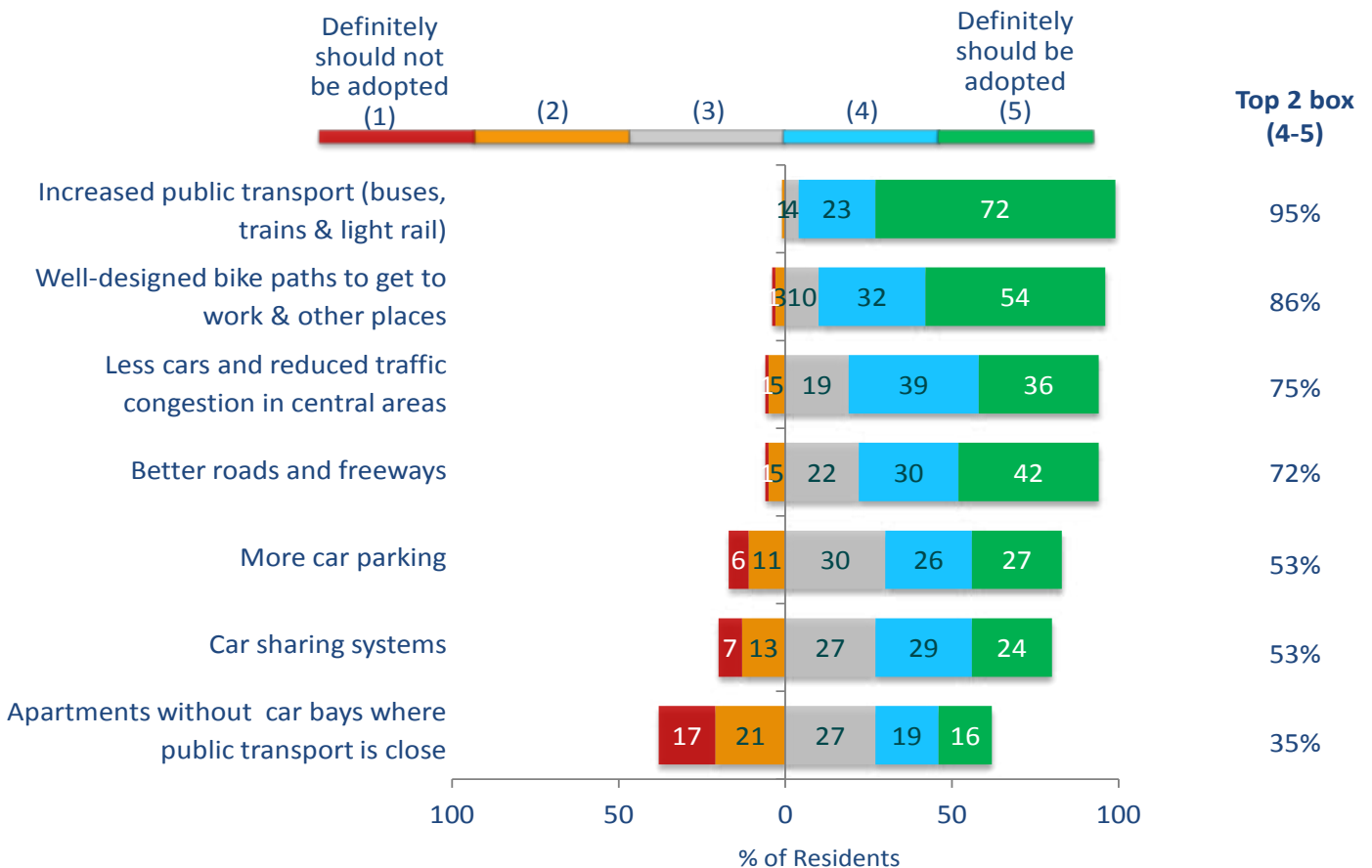


The majority of residents find medium to higher density apartment-style development for Perth city appealing.

INITIATIVES FOR PERTH

TRANSPORT INITIATIVES

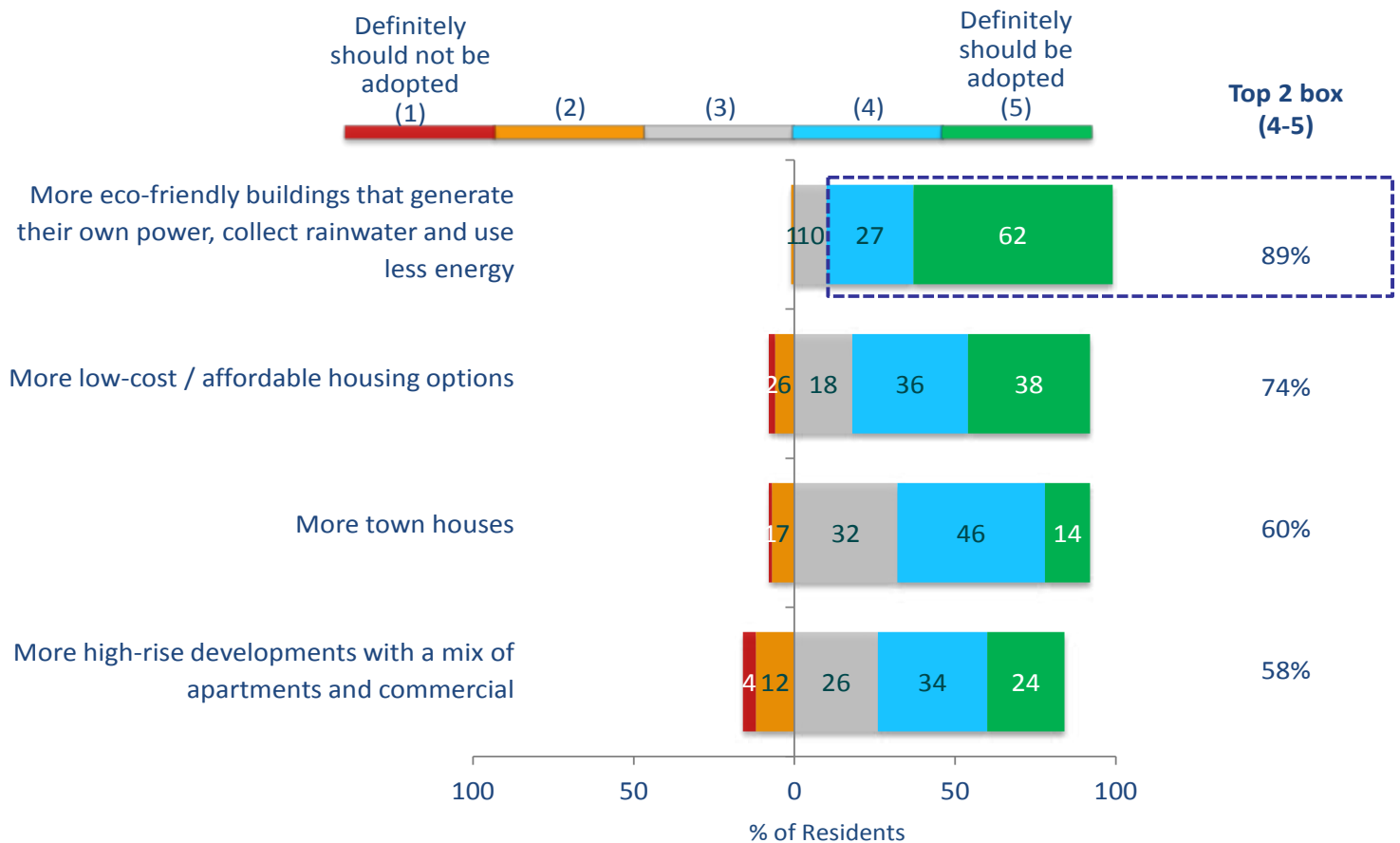
Thinking about the way Perth city is developing currently, what specific initiatives would you like to see adopted in the area?



35% of respondents would support apartments without car bays, with a majority support from respondents for car sharing systems.

HOUSING STYLES INITIATIVES

Thinking about the way Perth city is developing currently, what specific initiatives would you like to see adopted in the area?

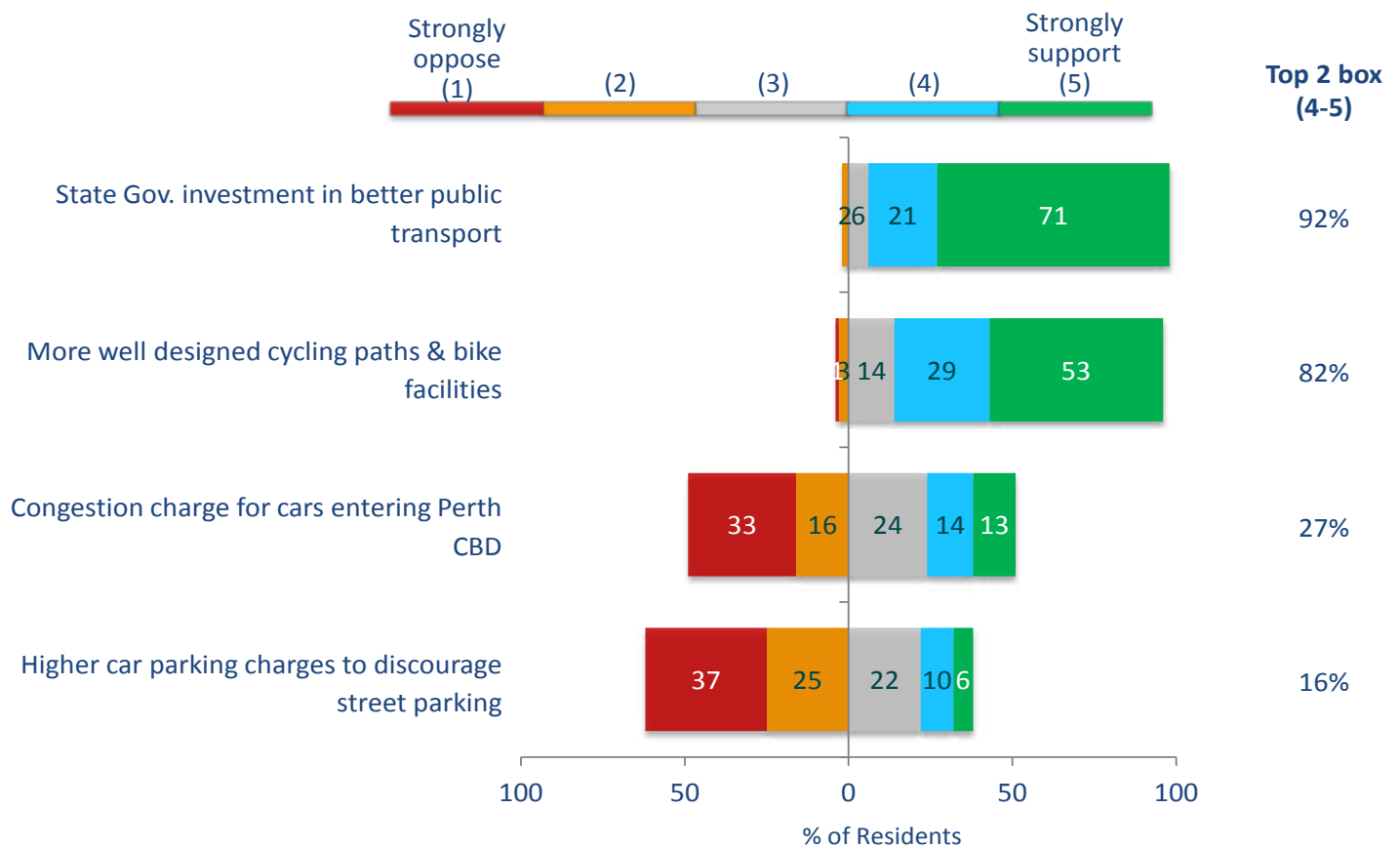


There is a definite appetite for more eco-friendly buildings in Perth city in the future.

POLICIES FOR PERTH

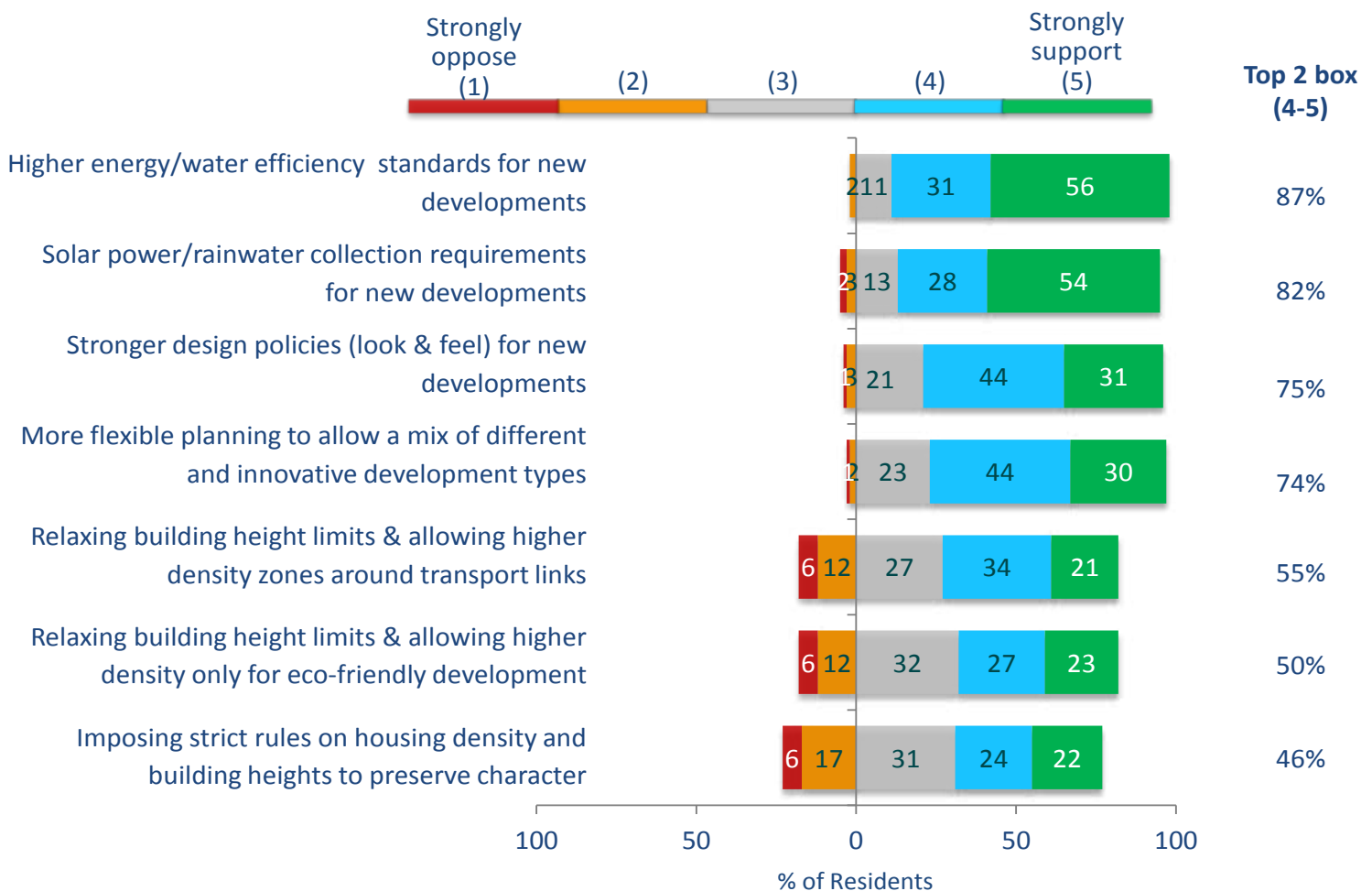
TRANSPORT POLICIES

Below are a number of policies the State Government could adopt to shape the future of WA. How strongly do you oppose or support each of the following policies?



BUILDING/PLANNING POLICIES

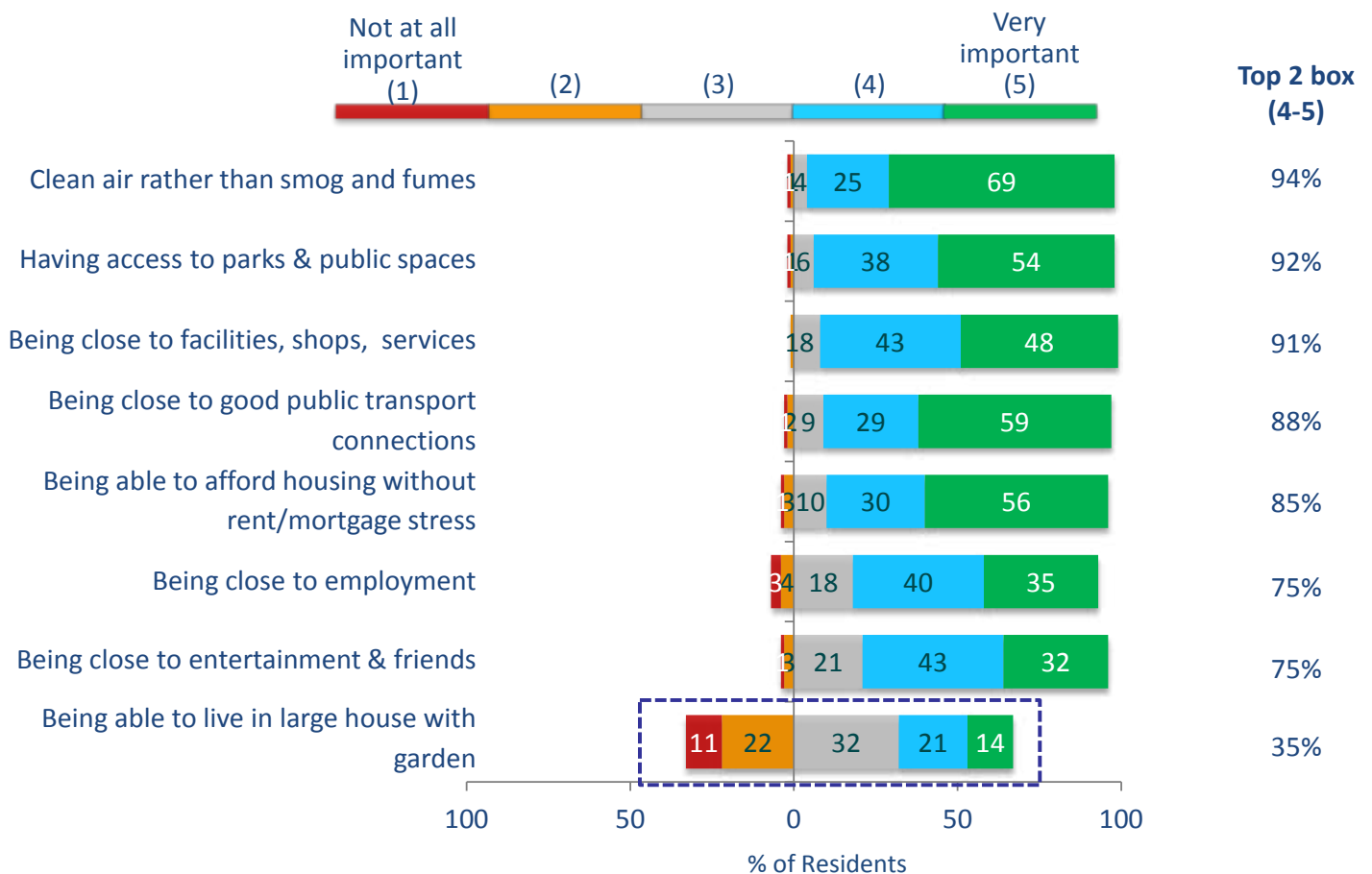
Below are a number of policies the State Government could adopt to shape the future of WA. How strongly do you oppose or support each of the following policies?



Over 80% of respondents support policies for energy/water efficiency and renewable energy generation capabilities for new developments.

CITY PLANNING AND DEVELOPMENTS

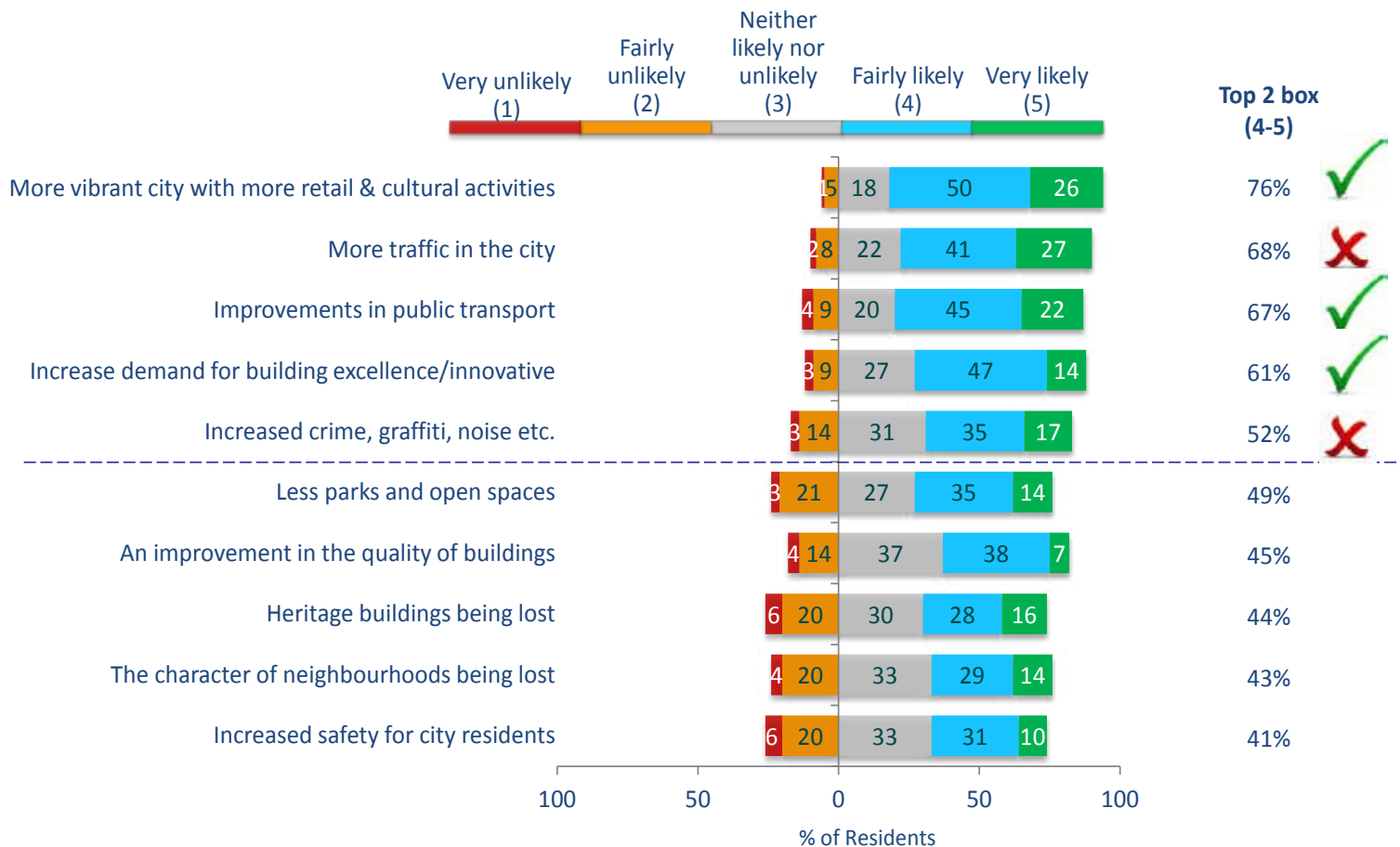
How important are each of the statements below in making metropolitan Perth (the entire metro region including northern, southern, eastern and western suburbs) a liveable city for you?



Access and close proximity to open spaces, facilities, shops, services and transport connections make a city liveable.

INNER CITY DEVELOPMENT

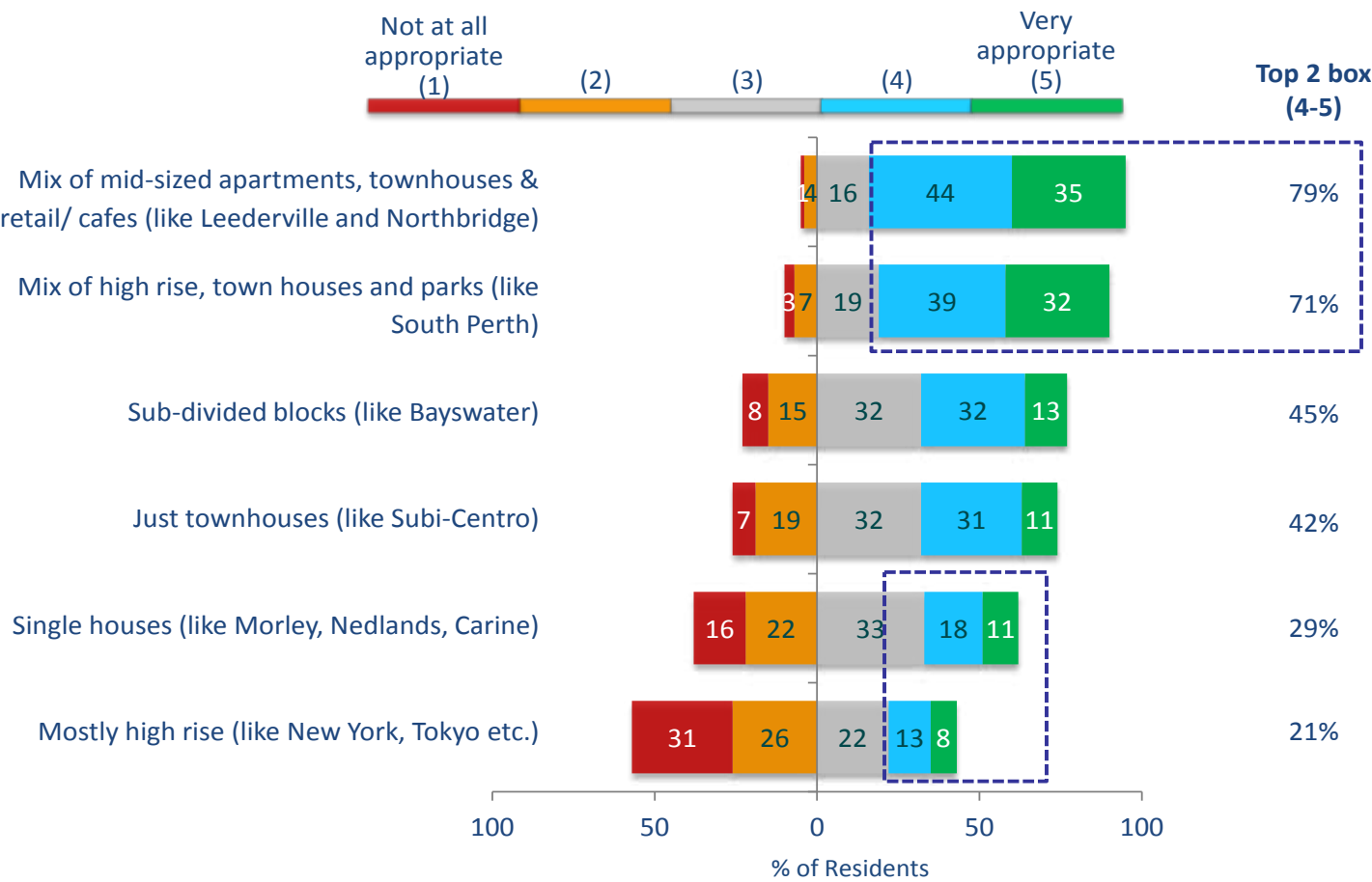
How likely do you believe it is that having more people living in Perth city and its inner suburbs will lead to...?



The majority of residents believe that while more people living in Perth city will have positive spin offs, the majority concerns are increases in traffic, crime, graffiti and noise etc.

APPROPRIATE HOUSING TYPES FOR PERTH CITY

How appropriate do you believe each of the housing types are for Perth city and its inner suburbs?

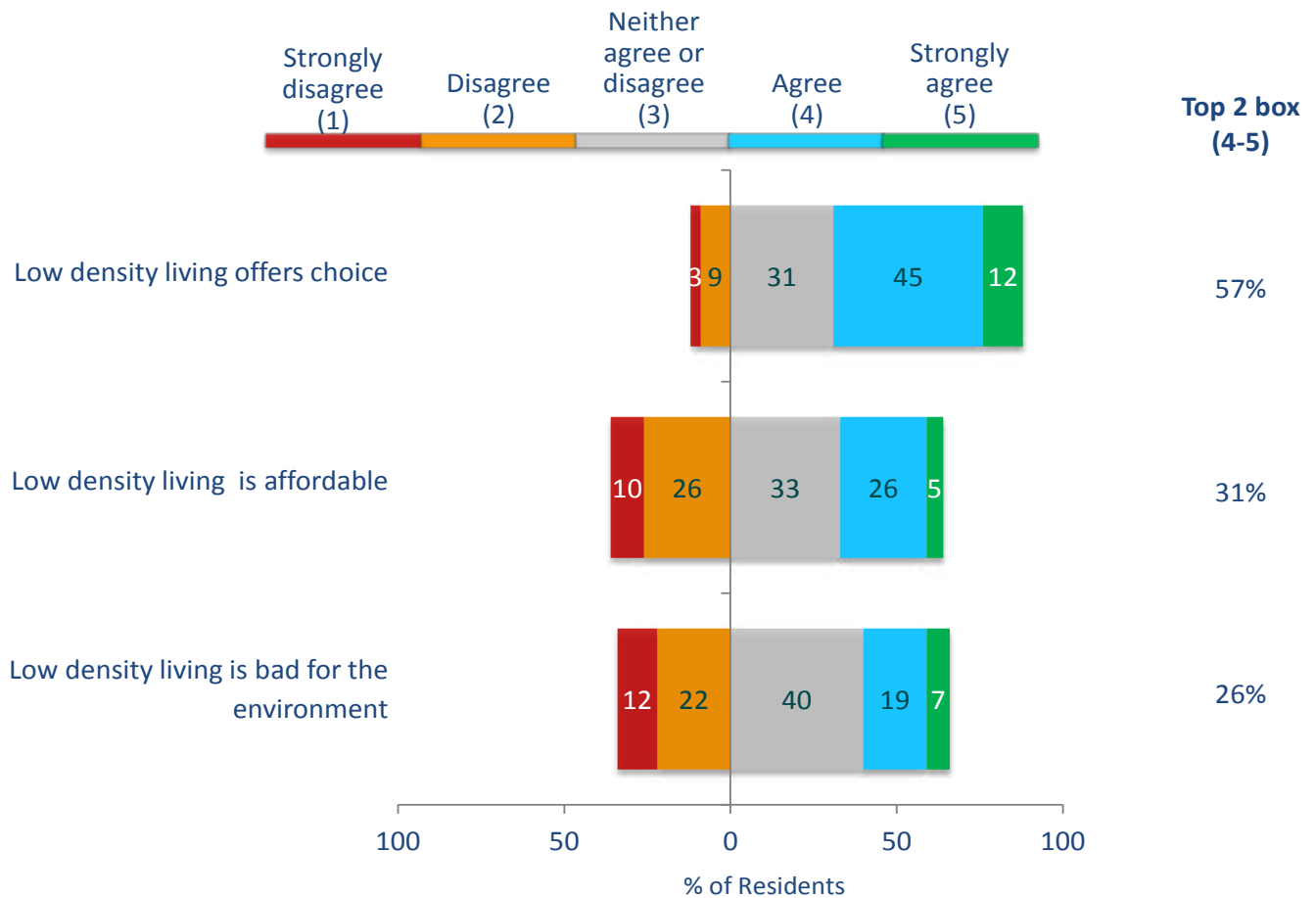


A mix of mid-sized apartments, townhouses and retail/cafes as well as a mix of high rise, town houses and parks are seen as the most appropriate housing types for Perth city and its inner suburbs.



LOW DENSITY SINGLE HOUSING

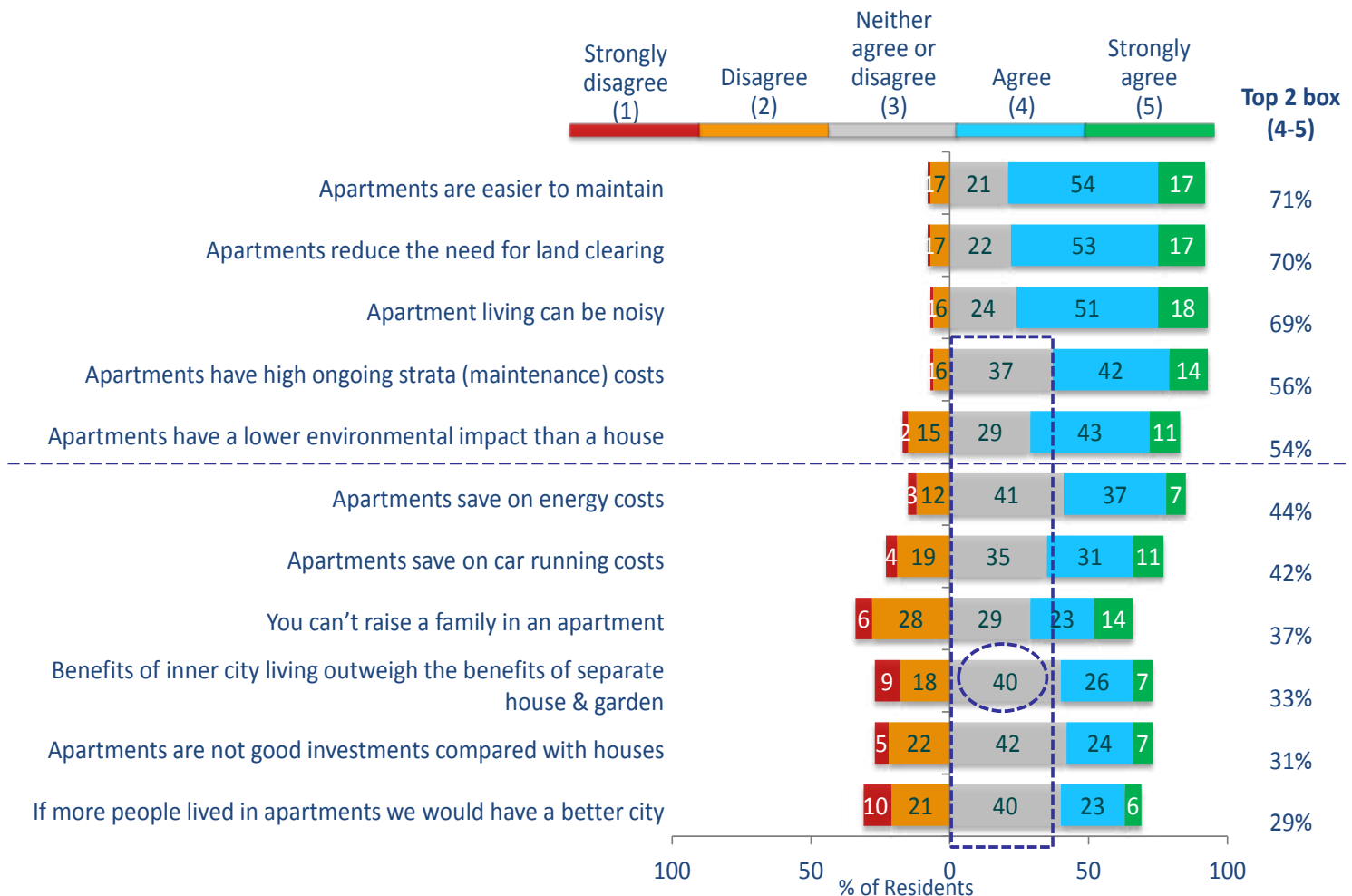
To what extent do you agree with the statements below about the current pattern of low density (single housing) development in the outer suburbs of the metropolitan area?



The majority of respondents do not consider low density living to be affordable.

APARTMENT LIVING

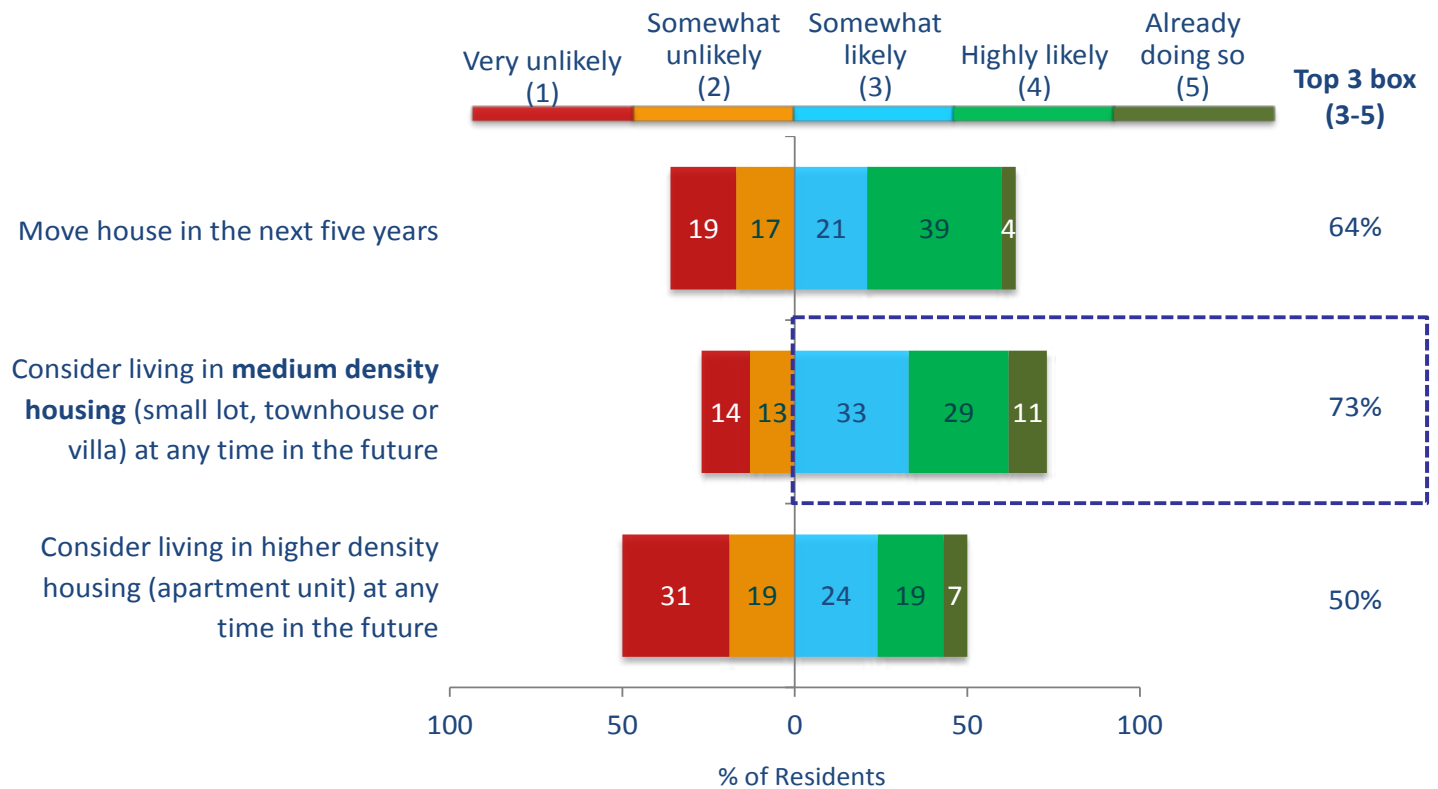
To what extent do you agree or disagree with the following statements about apartment living?



The high proportion of neutral ratings indicate that there is an opportunity to educate, especially amongst those who do not know if the benefits of inner city living outweigh the benefits of a separate house and garden.

LIVING INTENTIONS

How likely are you to...?



The majority would consider living in medium density housing in the future.

FOCUS GROUPS

Ipsos conducted two focus groups* with:

- People who felt higher density living should be the future direction of Perth; and
- People who lived within 10 kms of the Perth CBD.

The focus groups were:

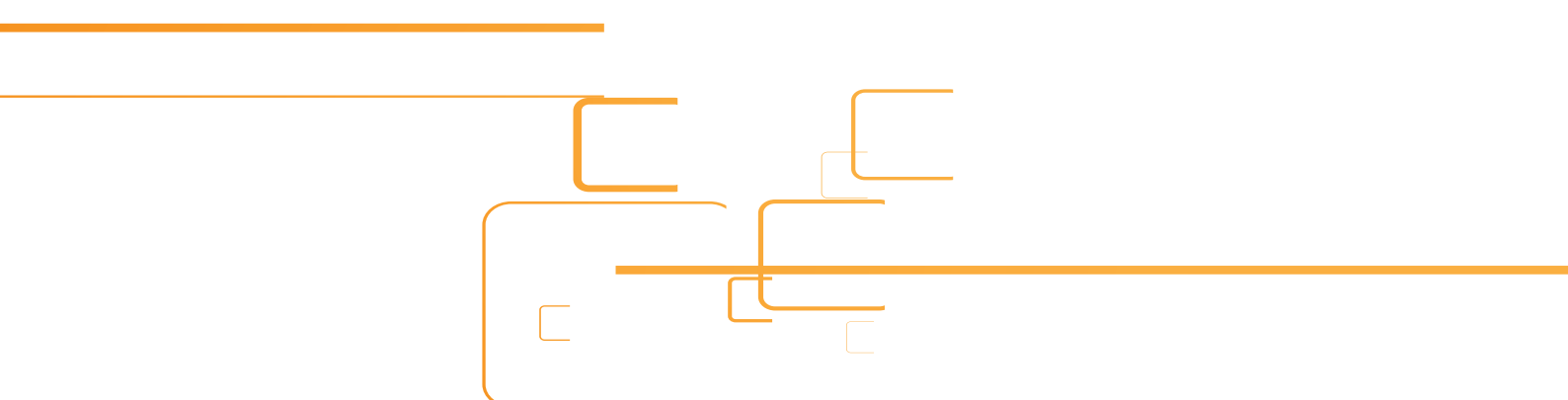
- Conducted on 30th July 2014;
- One and a half hours in length; and
- Recruited by an accredited fieldwork agency.

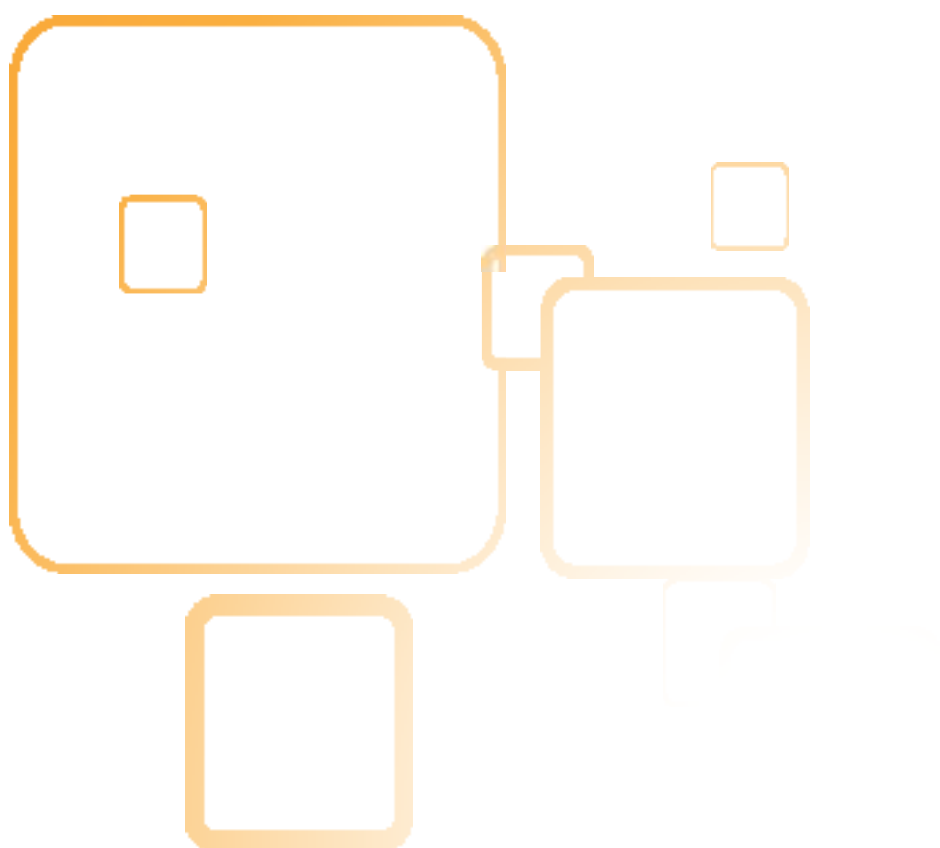
*Two focus groups are not representative and the results are indicative only.



KEY FOCUS GROUP FINDINGS

- Agreement that higher density is the best option for Perth for the future, to be a vibrant and sustainable city;
- A feeling amongst many that this is already happening - that the direction of Perth is currently towards higher density living and a sentiment of disbelief that anyone would not agree with the direction;
 - *“Isn’t it a no brainer? Of course we need higher density living in Perth.”*
 - *“We can’t keep growing up and down the corridor - the infrastructure can’t support it.”*
- There is very little call to action for people, despite their agreement that higher density living was better for the long term future of Perth. They were unlikely to sign a petition or attend a rally because they felt that there was no imminent need/threat.
- The key drivers for people to embrace high density living were convenience and ease, being able to lock and leave and not worry about a house/garden, and being in the CBD/city, which has slightly more vibrancy.
- There were some who felt they would move to the CBD if the infrastructure was further developed - if public transport was better and there was a greater sense of vibrancy.
- Higher density living isn’t seen as “a cause”. It is seen as the direction of the future and is already happening.







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