

Better Apartments - survey results

Prepared for the Department of Environment, Land,
Water and Planning

Report

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1 Introduction

In May 2015 Essence was engaged by the Department of Environment, Land, Water and Planning to assist with the development and administration of an online community engagement survey for the Better Apartments project. The community survey was approximately 12 minutes in length and administered using SurveyMonkey. It was launched on 29 May and closed on 31 July 2015. The survey was promoted through networks and online communication. All members of the community were invited to complete the survey including people who work in the building industry, live in an apartment, have lived in an apartment before, are planning to live in an apartment or own an apartment but don't live in it. This survey was promoted through:

- 'Planning Matters' – the email notification alert on planning related issues with over 4,000 subscribers.
- 'Better Apartments' webpage on the Department of Environment, Land, Water & Planning. Including a Ministerial video.
- Letters and emails to local government, community groups, industry stakeholders and peak bodies.
- Online advertising, social media and Ministerial and industry forums.

In addition, Essence managed the administration of a 'boost' survey using an online panel provided by The Online Research Unit (ORU) that targeted people aged 18 years and over and who currently live in an apartment in metropolitan Melbourne (post codes of 3000 – 3207). This sample excluded people currently living in an apartment with shared facilities provided by a tertiary education provider.

2 Methodology and sample

The full sample included n=1701 respondents from the two survey formats:

- n=1401 respondents from the community survey including 955 community members covering a number of different interests in apartment living and 446 people who work in the industry; and
- n=300 community members from The ORU panel (all of which live in an apartment).

In this report, there are a number of charts that refer to the type of respondent that participated in the surveys including:

- The full sample across both surveys (n=1701);
- Community members from the SurveyMonkey survey (n=955);
- Community members living in an apartment from ORU (n=300); and
- People working in the industry (n=446).

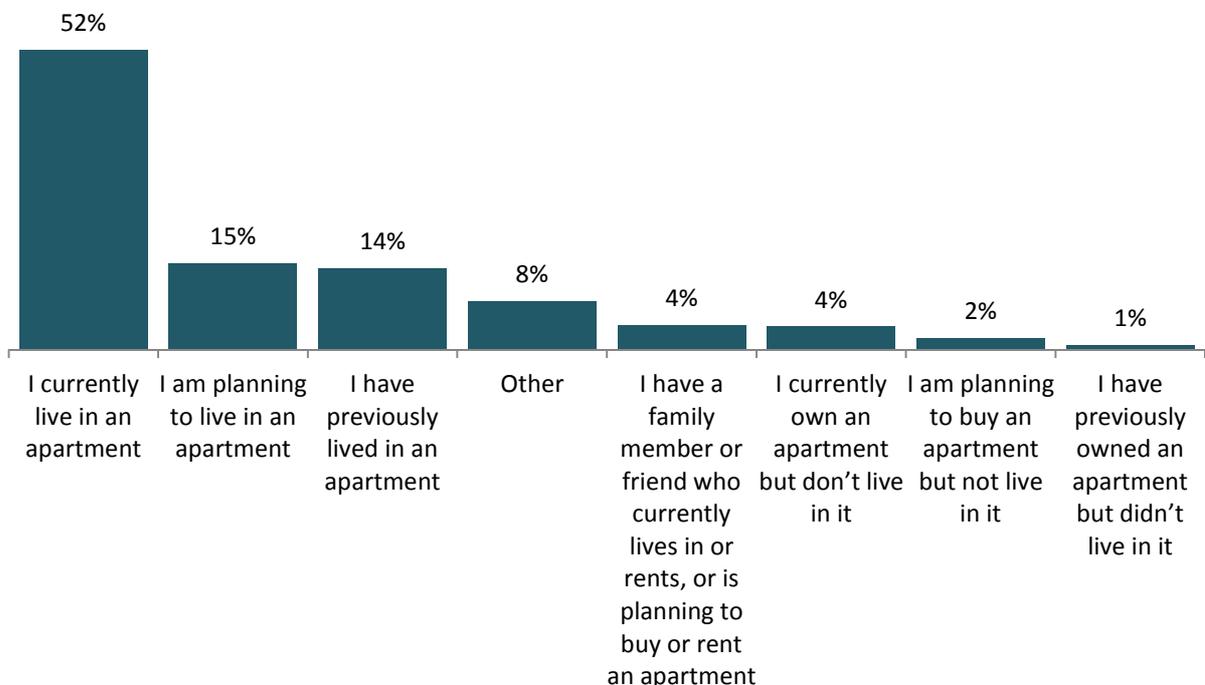
It should be noted that not all community members and people working in the industry answered every question in the SurveyMonkey survey resulting in variations of sample sizes that often do not total the full sample numbers outlined above.

2.1 Community members

Of the n=1701 respondents, n=1213 community respondents provided information about their interest in apartment living::

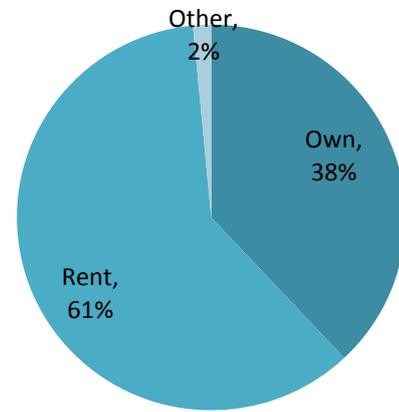
- 622 people who currently live in an apartment or 36 per cent of the entire sample (or 52 per cent of community members that responded ie. excluding people who work in the industry);
- 182 people who are planning to live in an apartment or 15 per cent of the entire sample;
- 172 people who have previously lived in an apartment or 14 per cent of the entire sample;
- 103 people or 8 per cent chose 'other' with a large portion of these living in an area with apartments or having a concern about sustainable living and wanting to express their view;
- 52 people or 4 per cent who have a family member or friend who currently lives in or rents, or is planning to buy or rent an apartment;
- 48 people or 4 per cent who currently own an apartment but don't live in it;
- 24 people or 2 per cent who are planning to buy an apartment but not live in it; and
- 10 people or 1 per cent who have previously owned an apartment but didn't live in it.

Community respondents



2.2 Renting and owning

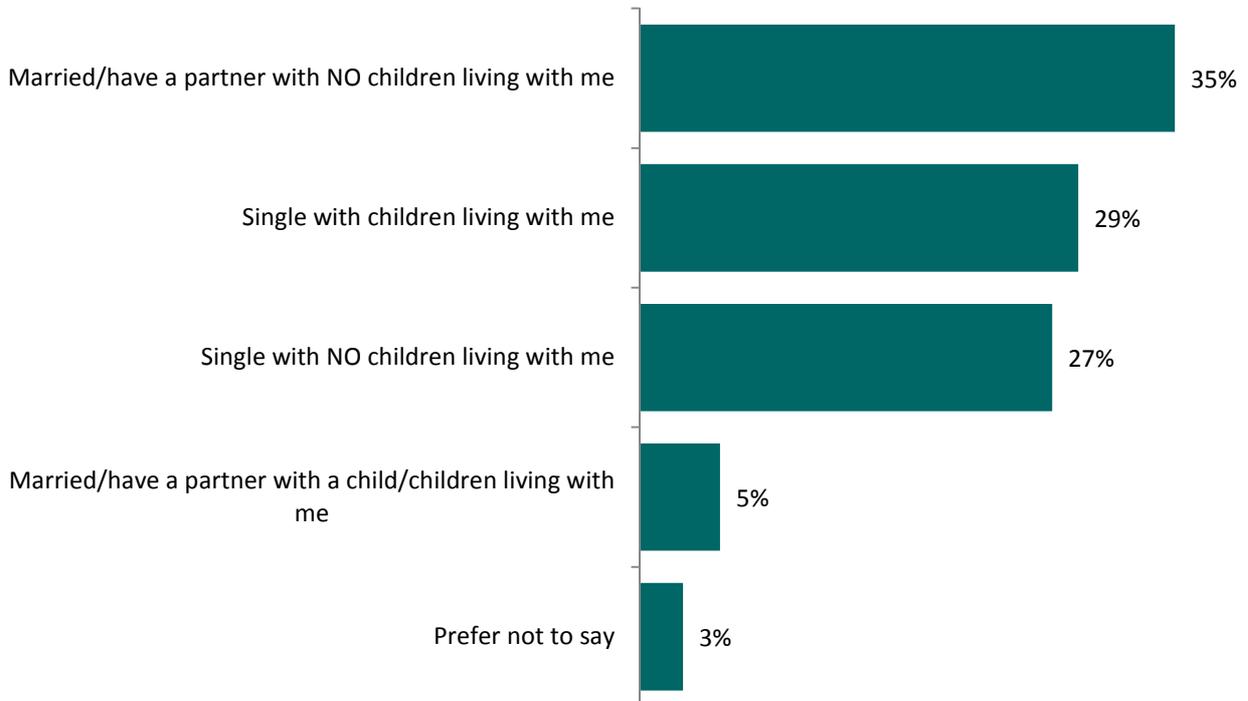
Of those who have previously lived or are currently living in an apartment (n=495) 61 per cent were renters and 38 per cent were owners.



2.3 Demographics

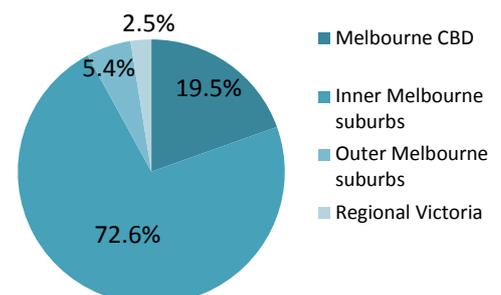
The responses indicate that a large portion of people with an interest in apartment living are either single or part of smaller families. Of the full sample that answered this question (n=1219), the vast majority (62 per cent) do not have children. However almost 30 per cent were single with children living with them.

n=1219 full sample



Of the SurveyMonkey community respondents (n=667) who answered this question, 72 per cent were in Inner Melbourne suburbs and almost 20 per cent were in Melbourne CBD. The entire ORU sample of n=300 comprised people who were living in an apartment in Metropolitan Melbourne (postcodes 3000 – 3207).

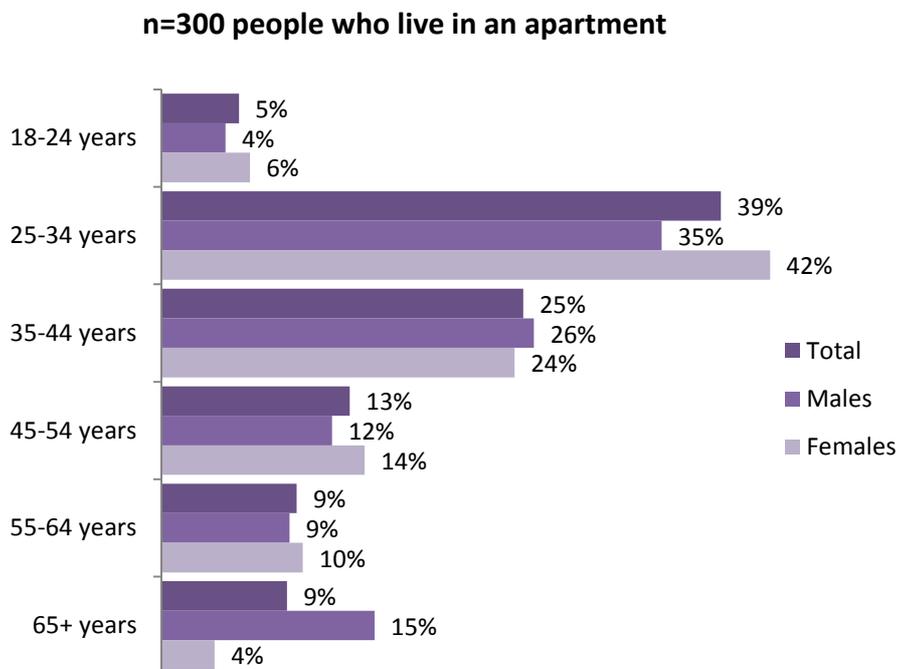
n=667 community responses



2.4 ORU sample of people living in an apartment in detail

The ORU survey sought additional demographic information about the n=300 people that currently live in an apartment:

- The entire ORU sample comprised people who were living in an apartment in Metropolitan Melbourne (postcodes of 3000 – 3207).
- People living in apartments are a little more likely to be female:
 - 55 per cent were female and 45 per cent were male.
- People living in apartments are a little more likely to be 25 to 34 years of age:
 - 5 per cent were 18 to 24 years old;
 - 39 per cent were 24 to 34 years of age with females making up a larger portion of this age group;
 - 25 per cent were 35 to 44 years of age;
 - 13 per cent were 45 to 54 years of age; and
 - 18 per cent were over 55 years of age.



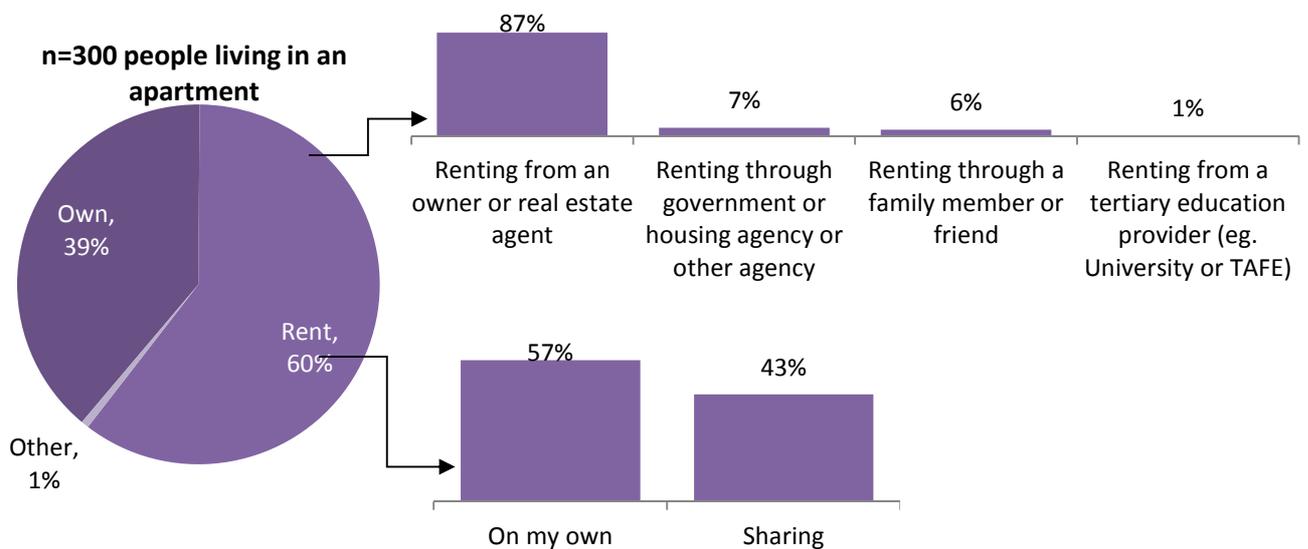
People living in an apartment are much more likely to be employed, with 76 per cent working full time.

- The majority of respondents had reasonable to higher level income:
 - 20 per cent were earning \$30,000 – \$59,999
 - 23 per cent were earning \$60,000 - \$89,999
 - 15 per cent were earning \$90,000 - \$119,999
 - 12 per cent were earning \$150,000 or above
 - 12 per cent were earning under \$30,000

2.5 Apartment ownership and renting

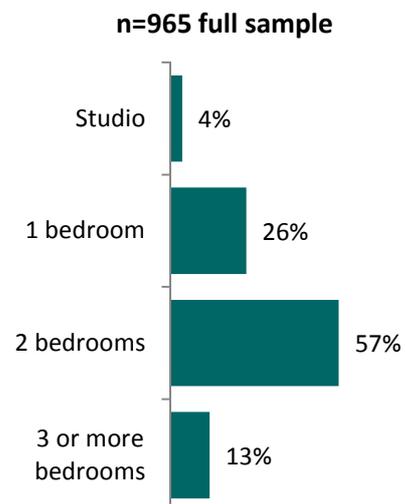
The ORU sample of n=300 saw a higher proportion of renters with 60 per cent (compared with 56 per cent of the overall sample). Of those who were renting:

- 57 per cent were renting on their own and 43 per cent were sharing.
- 87 per cent were renting from an owner or a real estate agent, 7 per cent through a government or housing agency, and 6 per cent through a family member or friend.



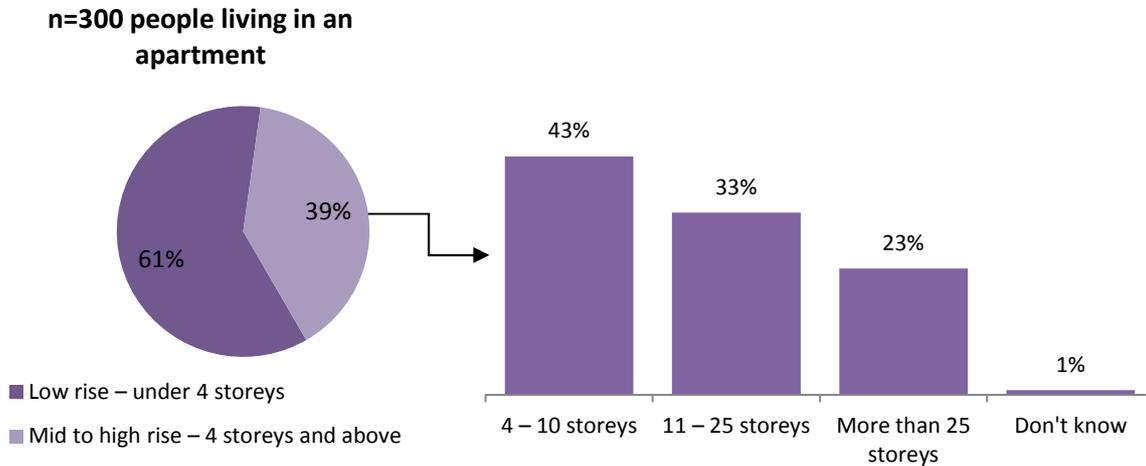
2.6 Size of apartment and complex

The majority of respondents (57 per cent) from the full sample of people that answered this question (n=965) were living, planning to live in or planning to buy an apartment with 2 bedrooms. Just over a quarter (26 per cent) nominated 1 bedroom.



Just over 60 per cent of the ORU sample of n=300 live in a low rise apartment complex. Of the 39 per cent who live in a mid to high rise complex:

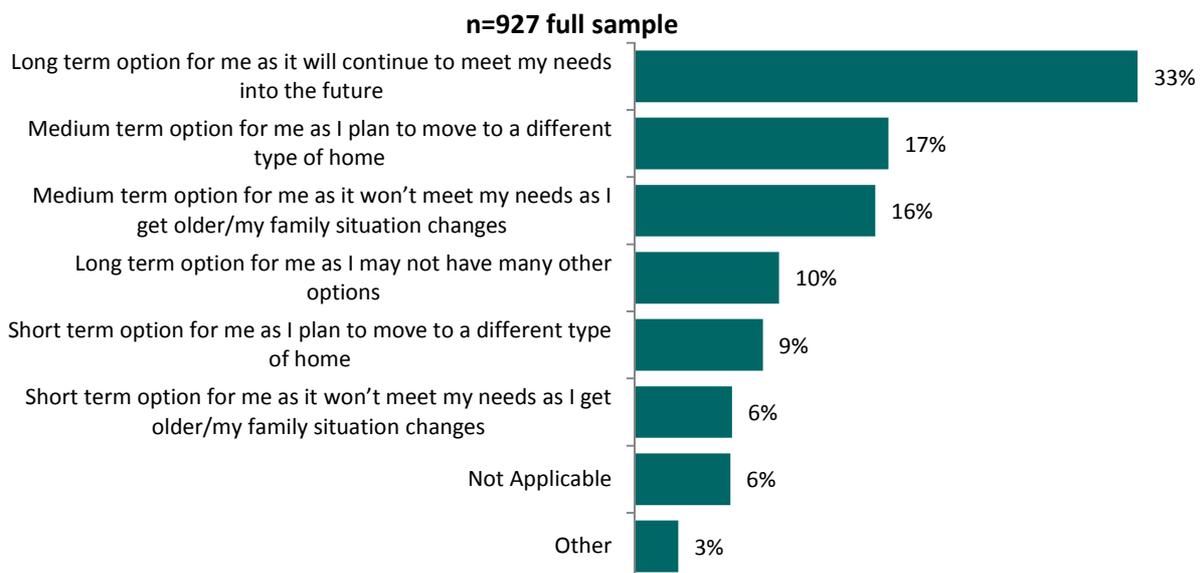
- 43 per cent were in 4-10 storeys
- 33 per cent were in 11-25 storeys
- 23 per cent were in more than 25 storeys



2.7 Longevity

Of the full sample who answered this question (n=927) a third (33 per cent) believe that apartment living is a long-term option for them as it will continue to meet their needs into the future (38 per cent of these respondents from the ORU sample of n=300 were married with no children and 65 per cent were aged 25-54 years of age).

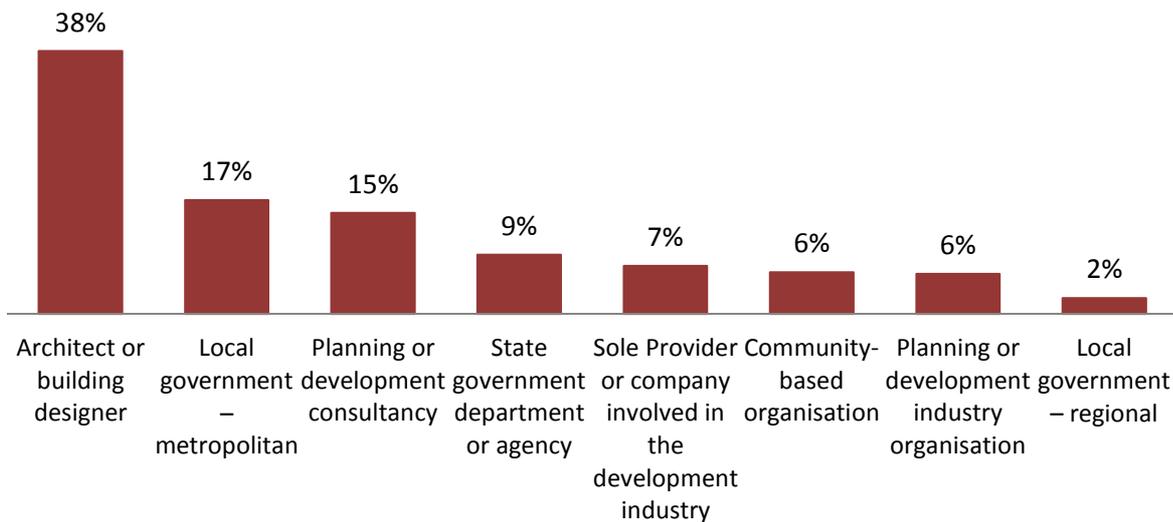
Similarly, a third (33 per cent) of respondents believe that apartment living is a medium-term option either because they plan to move to a different type of home or because it won't meet their needs as they get older or their family situation changes. Ten per cent believe it is a long-term option because they may not have many other options.



2.8 Working in the industry

Of the full sample of n=1701 and of the n=446 industry respondents including, n=426 identified themselves as:

- 38 per cent or n=164 respondents were an architect or building designer;
- 17 per cent or n=71 respondents were from a metropolitan local government;
- 15 per cent or n=63 respondents were from a planning or development consultancy;
- 9 per cent or n=37 respondents were from State Government;
- 7 per cent or n=30 respondents who were a sole provider or a company involved in the development industry;
- 6 per cent or n=26 respondents were from community-based organisations;
- 6 per cent or n=25 respondents were from planning or development industry organisations; and
- 2 per cent or n=10 respondents were from regional local government.



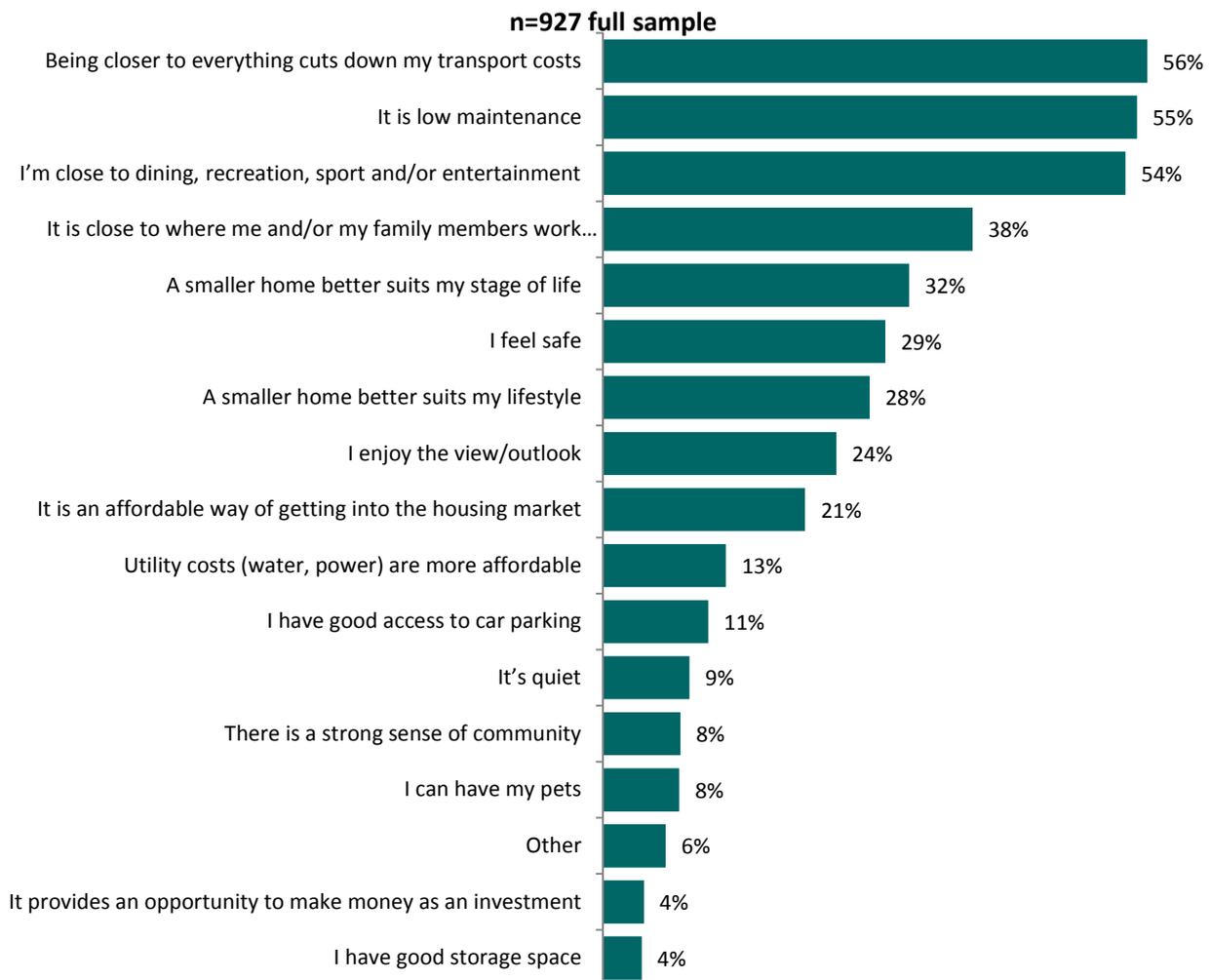
A large portion of respondents who work in the planning and development industry were located in or near Melbourne CBD and the inner metropolitan region with 89 per cent (or n=381) respondents working in post codes 3000 – 3207.

3 Key findings

3.1 What is liked most about apartment living

Respondents were asked to nominate from a list provided, the top five things they like most about apartment living. Respondents (n=927) were in strong agreement about the top three benefits of apartment living, clearly highlighting that proximity, low maintenance and a home that is smaller to suit their stage of life are the best aspects:

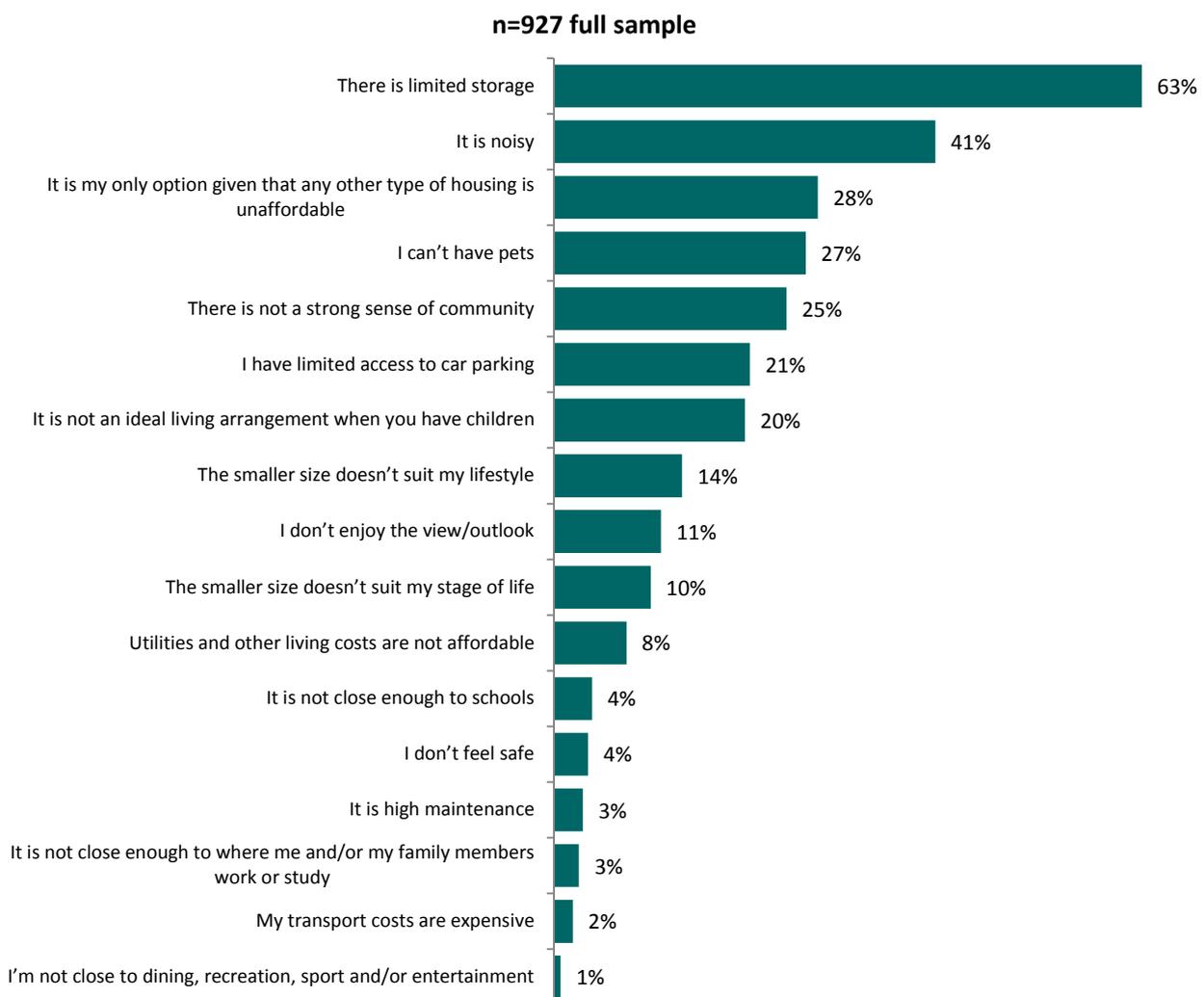
- 56 per cent of respondents chose being close to everything and cutting down on transport costs as one of the top five things they like most about apartment living;
- 55 per cent chose low maintenance (less relevant for 18-24 year olds);
- 54 per cent chose being close to dining, recreation, sport and/or entertainment;
- 38 per cent chose being close to work or study (less relevant for over 55 year olds); and
- 32 per cent agreed a smaller home better suits their stage of life (weighted towards 18-24 and over 55 year olds and to single people living with children at home).



3.2 What is liked least about apartment living

There was less agreement about the things people like least about apartment living, with responses across the full range of options. However, lack of storage was by the vast majority considered to be the most common downside of apartment living. This was followed by noise, affordability of alternative housing, inability to have pets, and the lack of community.

- 63 per cent of respondents chose limited storage as one of the top five things they like least about apartment living;
- 41 per cent chose noise;
- 28 per cent chose that it was their only option given that other types of housing are unaffordable (heavily weighted towards 18-24 year olds and single people living with children at home);
- 27 per cent chose that they can't have pets (weighted towards 18-24 year olds); and
- 25 per cent chose that there is not a strong sense of community (weighted towards people over 55 years).



3.3 Attitudes towards apartment living

Respondents were asked to rate their agreement to a series of statements that describe apartment living, on a 5-point scale from strongly disagree (1), disagree (2), neutral (3), agree (4), to strongly agree (5). These ratings are averaged to deliver an overall score out of 5 that correlates with its level of agreement.

There was very strong agreement to three statements focusing on daylight, apartment size, and design, indicating a keen level of interest in these areas in particular. Other statements attracted a more tempered response with more variation between agree and disagree. The statement that received the greatest level of uncertainty was the one that suggested that location is the most important thing when it comes to apartment living (28 per cent were unsure). The strongest level of disagreement was to the statement that it's not possible for apartments to be designed to suit every stage of living.

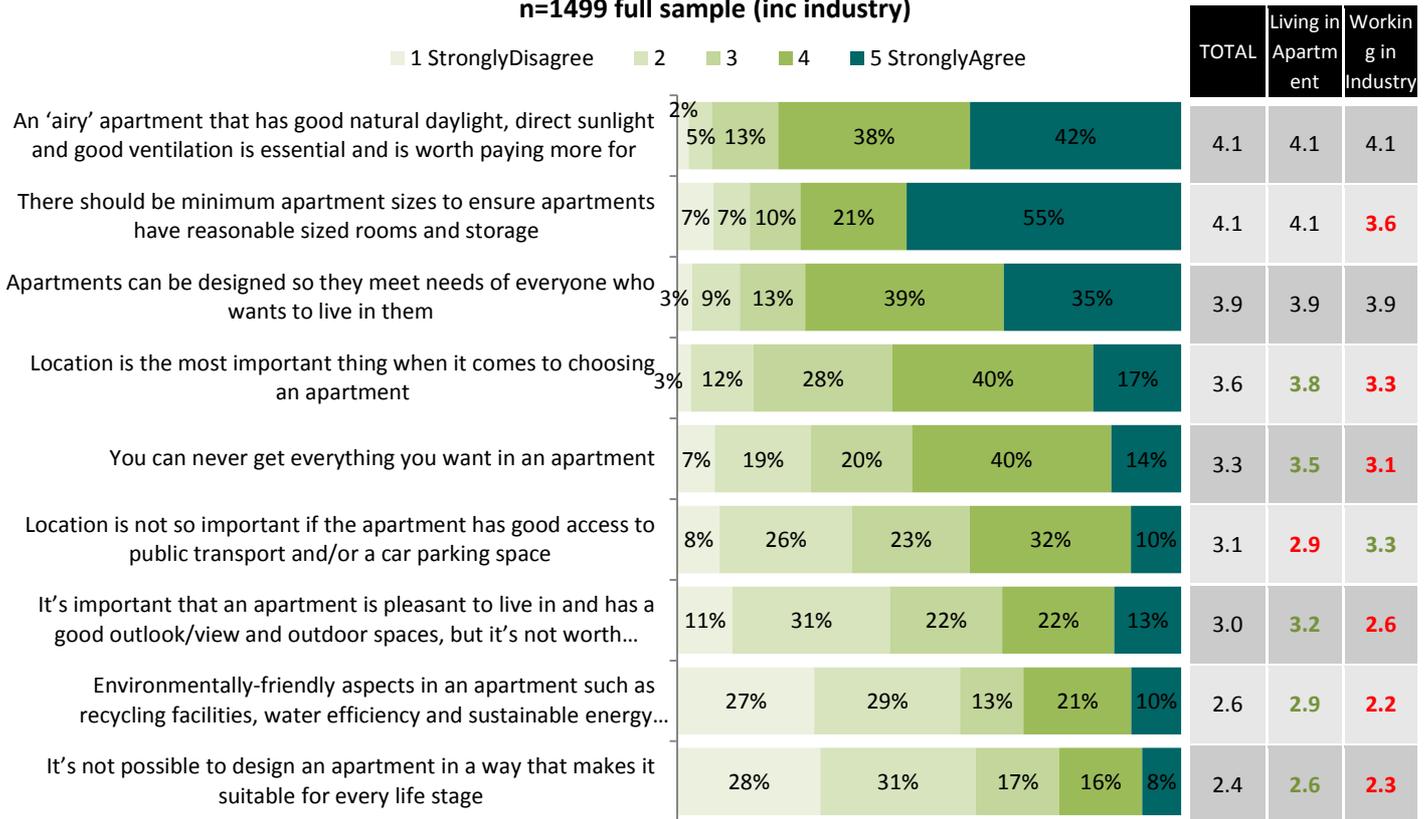
- **Daylight:** an overwhelming 80 per cent of respondents agreed or strongly agreed that an airy apartment that has good natural daylight, direct sunlight and good ventilation is essential and is worth paying more for. The ratings average to 4.1 out of 5, indicating overall agreement with the statement;
- **Apartment size:** a similarly high 76 per cent of respondents agreed or strongly agreed that there should be minimum apartment sizes to ensure apartments have reasonable sized rooms and storage. This response included a significant 55 per cent of respondents who strongly agreed. The ratings for all respondents to this question average to 4.1 out of 5, indicating overall agreement with the statement. People who work in the industry were in less agreement, resulting in an overall rating of 3.6 out of 5, with 62 per cent agreeing or strongly agreeing. The people who work in the industry who agreed or strongly agreed with this statement were more likely to be an architect or building designer (42 per cent) or from metropolitan local government (17 per cent).
- **Design:** again, a substantial 74 per cent of respondents agreed or strongly agreed that apartments can be designed so they meet the needs of everyone who wants to live in them. The ratings average to 3.9 out of 5, indicating overall agreement with the statement;
- **Life stage:** 59 per cent disagreed or strongly disagreed that it's not possible to design an apartment in a way that makes it suitable for every life stage. The ratings average to 2.4 out of 5, indicating that there is a level of disagreement and uncertainty around this statement (ie. people disagree or are unsure that an apartment can be designed in a way that makes it suitable for every life stage);
- **Location:** 57 per cent of respondents agreed or strongly agreed that location is the most important thing when it comes to choosing an apartment (people who work in the industry were in less agreement at 47 per cent). The ratings average to 3.6 out of 5, indicating a level of uncertainty leaning towards agreement with this statement;

- **Environmentally-friendly:** 56 per cent disagreed or strongly disagreed that environmentally-friendly aspects in an apartment are 'nice to have' rather than 'must haves' (people who work in the industry were in stronger disagreement at 70 per cent). The ratings average to 2.6 out of 5, indicating disagreement with a level of uncertainty about this statement;
- **All you want:** 54 per cent of respondents agreed or strongly agreed that you can never get everything you want in an apartment (people who work in the industry were in less agreement at 48 per cent). The ratings average to 3.3 out of 5, indicating a level of uncertainty about this statement leaning towards agreement;
- **Outlook:** 42 per cent disagreed or strongly disagreed that it's important that an apartment is pleasant to live in and has a good outlook/view and outdoor spaces, but it's not worth paying more for it (people who work in the industry were in stronger disagreement at 54 per cent). The overall ratings average to 3.0 out of 5, indicating a general level of uncertainty about this statement. Ratings by people who work in the industry average 2.6, indicating general disagreement leaning towards uncertainty and a stronger focus on the value of the outlook compared with people who live in them;
- **Transport:** 42 per cent of respondents agreed or strongly agreed that location is not so important if the apartment has good access to public transport and/or a car parking space (people who work in the industry were in more agreement at 50 per cent). The total ratings average to 3.1 out of 5, indicating overall uncertainty about this statement.

The following chart shows the level of agreement in response to each question, the average score from the total sample of those respondents who answered the question and to highlight any differences between our major segments, the average score has been provided for respondents living in an apartment and those working in the industry:

n=1499 full sample (inc industry)

1 StronglyDisagree 2 3 4 5 StronglyAgree



N.B. Red numbers denote a significantly lower statistic in comparison to the full sample and green numbers denote a significantly higher statistic in comparison to the full sample.

3.4 Apartment living for the future

3.4.1 Most important aspects

Across the full sample, the most important aspects that respondents believe must be considered to meet the needs of the community in the future are reasonable size/space/storage, adequate natural light, sufficient ventilation and noise minimisation.

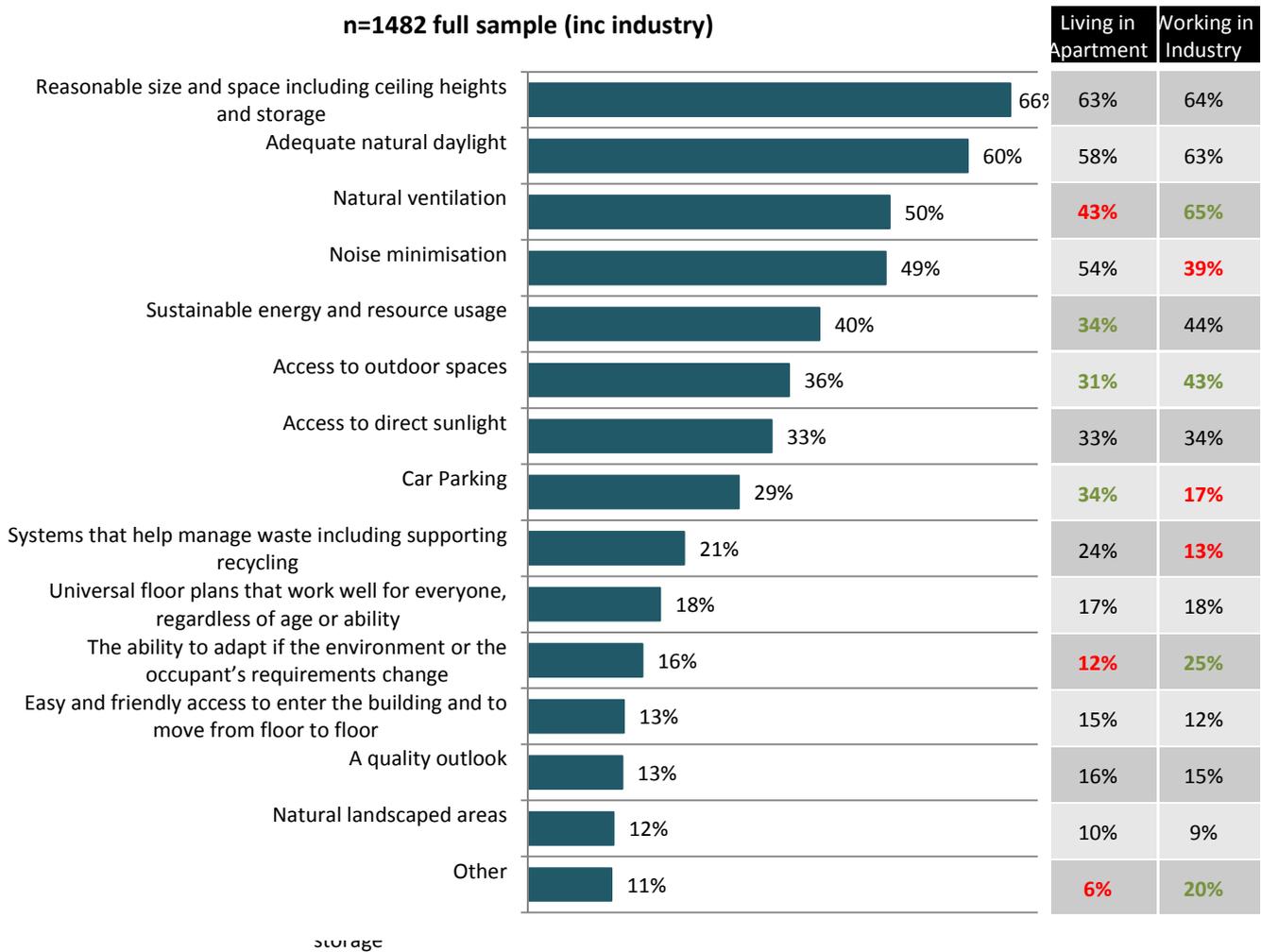
While people who live in an apartment view reasonable size and space including ceiling heights and storage as the most important factor to be considered, people who work in the industry believe natural ventilation is the most important (quickly followed by reasonable size). People who work in the industry also value sustainable energy and access to outdoor spaces more than those who live in an apartment. People who live in an apartment value noise minimisation and car parking more than people who work in the industry.

When asked to choose the most important aspects (up to five) of apartment living to meet the needs of the community in the future, respondents nominated:

- **Size and space:** 66 per cent of all respondents chose reasonable size and space including ceiling heights and storage;

- **Daylight:** 60 per cent of all respondents chose adequate natural daylight;
- **Ventilation:** 50 per cent of all respondents chose natural ventilation. People who work in the industry, however, view this as the most important aspect with 65 per cent choosing natural ventilation compared with 43 per cent of people living in an apartment;
- **Noise minimisation:** 49 per cent of all respondents chose noise minimisation, while only 39 per cent of people who work in the industry selected this compared with 54 per cent of people living in an apartment;
- **Sustainable energy:** 40 per cent of all respondents chose sustainable energy and resource usage. While 44 per cent of people who work in the industry chose this, only 34 per cent of people living in an apartment selected it;
- **Access to outdoor spaces** while 36 per cent of all respondents chose access to outdoor spaces, it was more important to people who work in the industry, where it was selected by 43 per cent compared with 31 per cent of people living in an apartment;
- **Sunlight:** 33 per cent of all respondents chose access to direct sunlight;
- **Car parking:** 29 per cent of all respondents chose car parking and, while 34 per cent of people living in an apartment value this, only 17 per cent of people who work in the industry do. For those living in an apartment who chose car parking, they were more likely to own their apartment compared to renters and be in apartment complexes that are low rise (51 per cent of respondents to the n=300 ORU survey i.e people living in an apartment, who chose car parking as important, live in a low rise apartment complex).

n=1482 full sample (inc industry)



N.B. Red numbers denote a significantly lower statistic in comparison to the full sample and green numbers denote a significantly higher statistic in comparison to the full sample.

3.4.2 Least important aspects

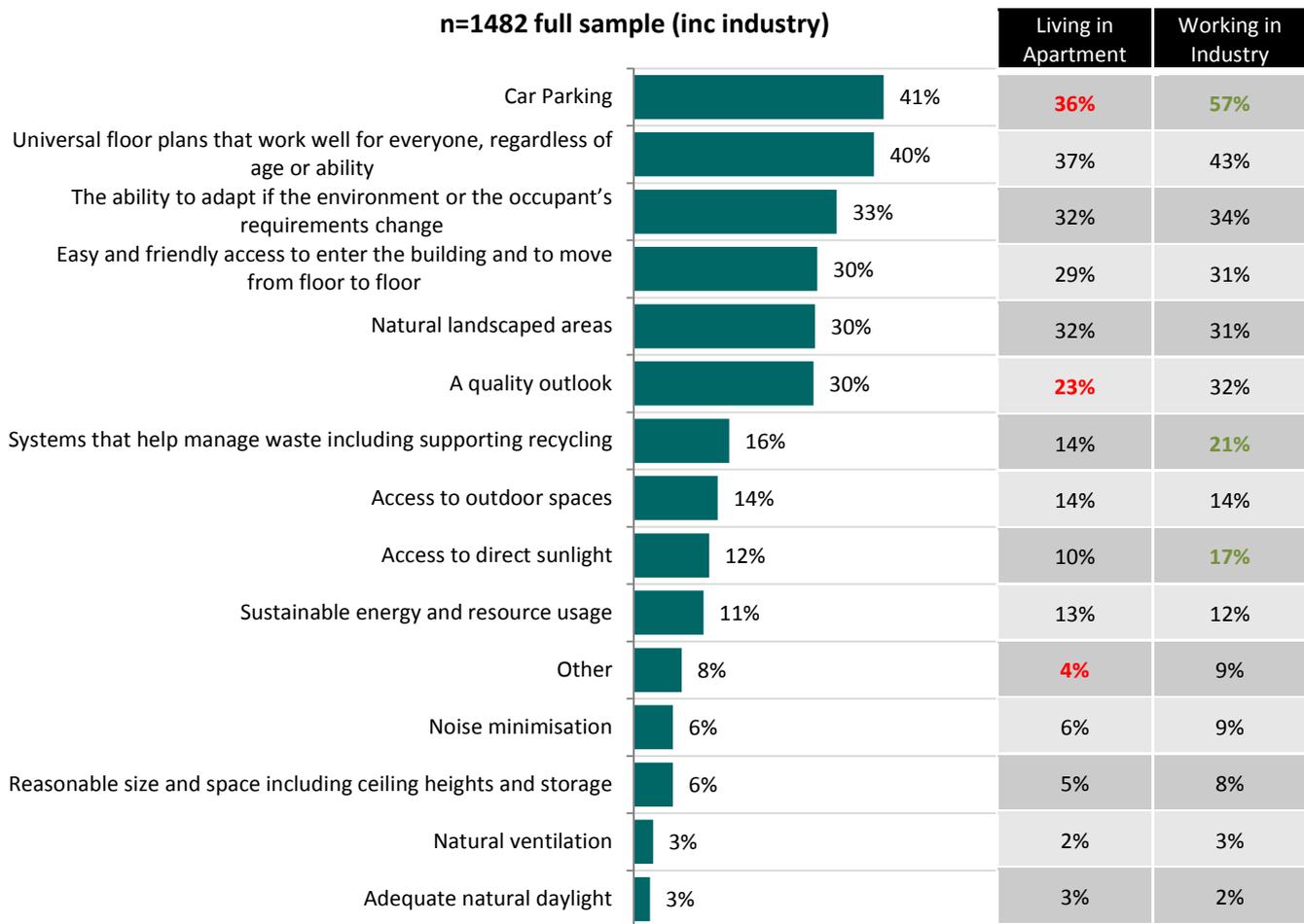
When asked to identify the least important aspects of apartment living to meet the needs of the future, respondents were in less agreement with many choosing a different set of five (or up to five) responses from the options provided.

Overall car parking is considered the least important aspect, however, universal floor plans were considered to be similarly unimportant. Views differed between people currently living in an apartment and those working in the industry, with people living in an apartment indicating that universal floor plans were the least important while people working in the industry were in vast agreement that car parking is not important.

A quality outlook is also considered to be less important by people who work in the industry than by people who live in an apartment.

When asked to choose the least important aspects (up to five) of apartment living to meet the needs of the community in the future, respondents nominated:

- **Car parking:** 41 per cent of all respondents chose car parking, however, this varied by segment with 37 per cent of people living in an apartment selecting it compared with people working in the industry who were in vast agreement, with 57 per cent choosing car parking as the least important aspect. For people who live in an apartment, those who are renting are slightly more likely to see car parking as unimportant;
- **Universal floor plan:** 40 per cent of all respondents chose universal floor plans that work well for everyone, regardless of age or ability. People who live in an apartment see it as the least important of all the options;
- **Changing environment:** 33 per cent of all respondents chose the ability to adapt if the environment or the occupant's requirements change;
- **Quality outlook:** 30 per cent of all respondents chose a quality outlook and, while 23 per cent of people living in an apartment selected this, it was chosen by 32 per cent of people working in the industry. Of those people living in an apartment who chose a quality outlook as one of the least important aspects, they were more likely to be renting than owners. There did not appear to be a preference for outlook based on the size of their apartment complex.



N.B. Red numbers denote a significantly lower statistic in comparison to the full sample and green numbers denote a significantly higher statistic in comparison to the full sample.

3.5 Key themes

In addition to the quantitative questions, respondents were offered an opportunity to clarify any of the views or answer choices through an open-ended question. They were asked specifically about what other things need to be considered when designing apartments for the future. There was a substantial response to this question with 887 respondents choosing to provide more information. Respondents offered valuable insights into the opportunity to ensure apartment living can meet the needs of a broader demographic and the demands of future residents.

3.5.1 Affordable and reasonable apartment sizes to suit any family

A clear issue for respondents is the design of apartments in a way that allows a reasonable size and sufficient storage. They believe it is important to find a balance between offering open, functional spaces with adequate storage solutions and doing so at an affordable purchase or leasing price.

Some residents voiced their concern over unacceptably low ceiling heights whilst disagreeing with overly high apartment buildings. Overcrowding was raised as an issue that needs to be addressed, whereby the overall quality, design and maintenance of apartment buildings should be improved rather than solely increasing the amount of people residing within them.

Smarter storage techniques and open layouts is what residents need. They see that the illusion of spaciousness in certain areas of the apartment and building complex can be executed once layouts are intelligently designed with functionality kept in mind. A lack of space in main living areas, predominantly in kitchens appears to be more problematic for residents.

Suggestions of adequate, family-sized apartments on lower levels and reserving higher levels for smaller sized apartments suitable to couples and singles were raised. This notion would offer easy access for children to the ground level and open spaces for activities.

3.5.2 Quality of air and natural lighting is important for well-being

Poor ventilation and low or no natural lighting in rooms are each elements which leave residents unsatisfied and feeling as though they reside in poor quality environments. Ventilation and natural lighting specifically enhance the overall feel of apartments. Rooms without windows result in no natural lighting. Poor ventilation results in stuffiness or lingering odours from food or household waste rubbish chutes in apartment hallways. Residents have recognised bathrooms and laundries as two rooms not requiring windows but needing sufficient ventilation in the form of fans to avoid dampness and mould.

3.5.3 Access and convenience

Respondents believe that apartment living allows a convenient, low maintenance lifestyle. No gardening, minimal cleaning and central locations are therefore beneficial to residents. Access to parklands, bicycle infrastructure, public transport, shopping and off-street car parking was also highlighted.

3.5.4 Community space

A range of demographic segments including singles, couples and families with children have all chosen apartment living as the most viable option for them. For this reason, the subject of space varies given each demographic. Most agree however that living in an apartment complex can offer the perfect environment to form strong communities given the right opportunities are presented to residents. Many residents living in apartment buildings highlighted the importance of ensuring spaces are built that promote a sense of community among residents. This could comprise of private gardens, health and recreational facilities as well as other forms of communal areas or activities.

3.5.5 Living in close quarters with others

Respondents are very aware of the close living arrangements and the need to design apartments that take into consideration ways to minimise impact on others. The critical issue of noise was discussed often in the commentary and respondents noted that high noise pollution in denser areas or even among neighbours can affect relationships and even sleep and living quality.

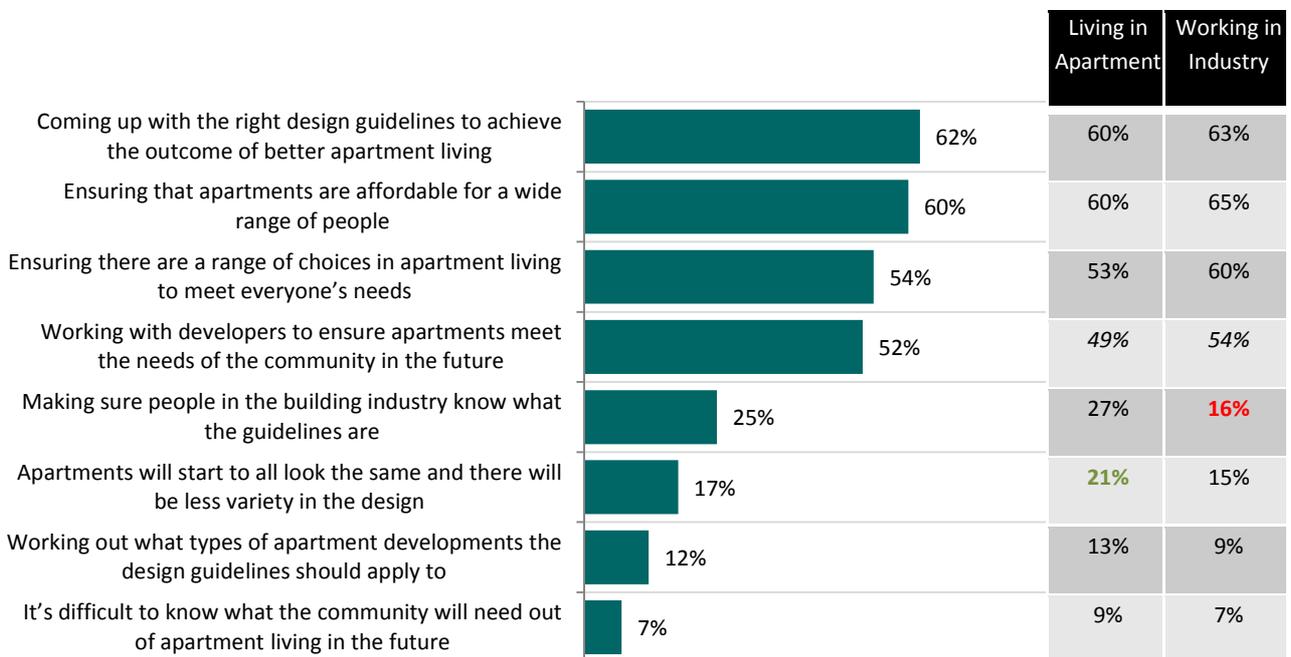
3.5.6 Protection against the elements

Respondents highlighted a key issue that impacts on apartment living is extreme hot or cold weather. Double-glazing of windows and installing insulation were raised as solutions that can minimise the impact of extreme weather conditions.

3.6 Top 3 challenges

Respondents were asked to identify the top three challenges to ensuring apartment living in Victoria is focused on meeting the needs of the community in the future. Overall, coming up with the right design guidelines to achieve the outcome of better apartment living, ensuring that apartments are affordable, and ensuring choices in apartment living are considered the top three challenges.

- While people who live in an apartment rate the right guidelines and affordability as the top two challenges (60 per cent), people who work in the industry believe affordability is clearly the top challenge (65 per cent).
- Ensuring that there are a range of choices in apartment living to meet everyone’s needs was also considered to be a greater challenge by people who work in the industry compared with people who live in an apartment.



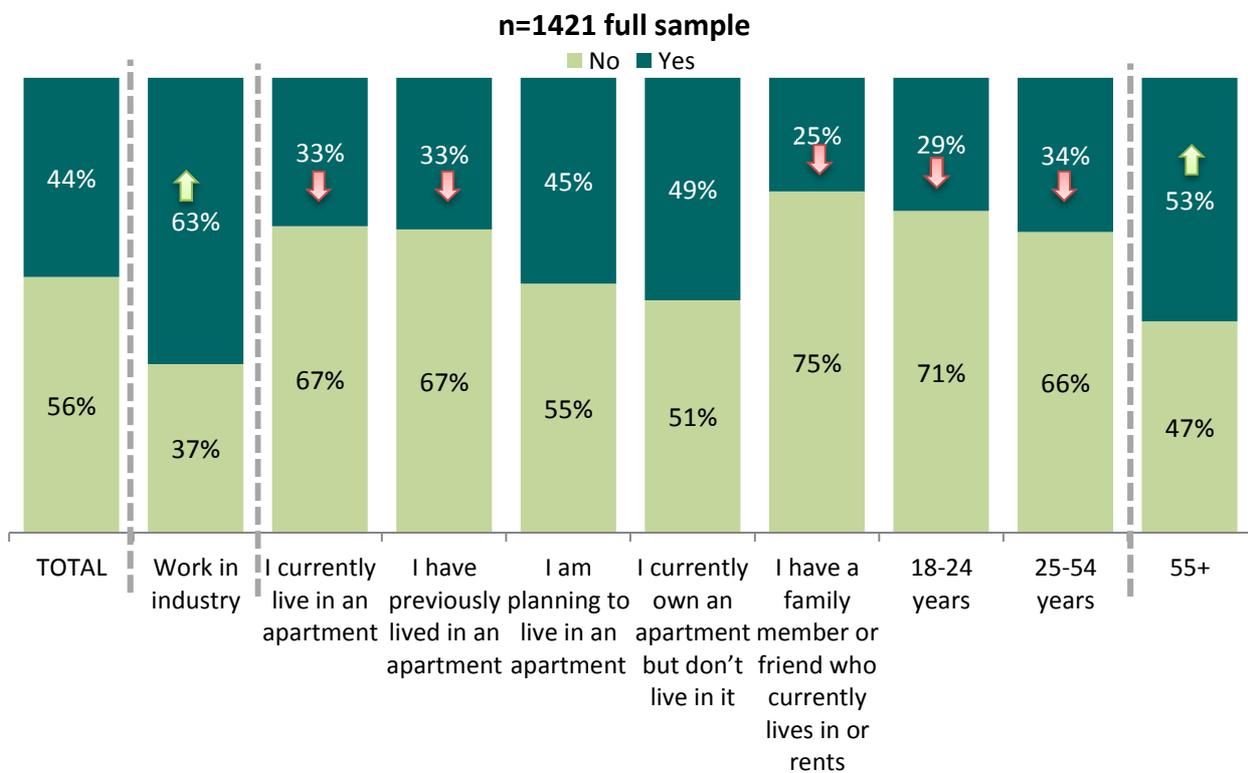
N.B. Red numbers denote a significantly lower statistic in comparison to the full sample and green numbers denote a significantly higher statistic in comparison to the full sample.

3.7 More information

Over half of all respondents who answered the final question of 'would you like to receive more information' (n=1421) indicated that they would like to receive more information.

People who currently live in apartment were least likely to want to receive more information (33 per cent) while people who work in the industry were most likely (63 per cent).

People who were over 55 years of age were also more likely to want more information (52 per cent).



↑ ↓ indicates a significantly higher or lower statistic compared to the full sample

4 Conclusion

It is clear that there is a very engaged community who considers apartment living to be an essential and very much highly valued living option in Victoria. The high response rate to the community survey and the quality of the comments combined with the emotional nature of the responses shows that the community have a keen interest in ensuring apartment living can meet the needs of the community into the future.

There is strong support for apartment living with many in agreement that it offers significant benefits. Three benefits in particular stand out with these being selected by a significant portion of the sample, over 50 per cent, clearly indicating broad agreement by the majority of respondents (the next closest benefit was chosen by far fewer respondents, 38 per cent). The three benefits are:

- Close proximity to everything they need;
- Cuts down on transport costs; and
- Low maintenance.

Similarly there are two key aspects of apartment living that stand out as the most disliked by respondents:

- A lack of storage; and
- Noise

For storage in particular there is widespread agreement with a very high portion of 63 per cent of respondents identifying the lack of storage as one of the things they dislike about apartment living. After noise, where a large portion of 41 per cent were in agreement that apartment living is noisy, the next closest option was selected by only 28 per cent.

When you consider all results and qualitative commentary, overall there is consistency in the feedback with all segments pointing out essentially two key issues facing apartment living for the future:

- Reasonable apartment sizes to ensure sufficient space and storage to suit any family type and life stage; and
- Quality of air, ventilation and natural daylight because it's important for health and well-being.

There are some areas where people working in the industry and people living in an apartment differ in their opinion and what is important to apartment living. While all segments agree that reasonable size and space and adequate natural daylight are important, natural ventilation was considered of greater importance by those working in the industry, as was access to outdoor spaces. People who live in an apartment also value natural ventilation but believe noise minimisation to be more important. A quality outlook appeared to be of greater importance for those working in the industry while people who live in an apartment place much greater value on car parking than those who work in the industry.

All segments agree that there are essentially four main challenges in ensuring apartment living is focused on meeting the needs of Victorians in the future:

- Coming up with the right design;
- Ensuring apartments are affordable;
- Ensuring there are a range of apartment options; and
- Working with developers to achieve the outcomes.

As outlined above, this is an engaged community with strong emotional connections to apartment living – many of whom have actively made the decision to live in an apartment and they highly value what it offers them. With over half of the total sample indicating an interest in receiving more information about how the discussion around better apartment living progresses, it will be important to continue to engage this group as the project moves forward.