# City of Whittlesea Household Survey Highlights Bulletin

## August 2017

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# 1. Introduction

The Research Team of City of Whittlesea commissioned Metropolis Research to conduct this, the twentieth *Household Survey*, the first being completed in 1997.

The survey provides a meaningful and reliable snapshot of the population of the City of Whittlesea. The *Household Survey* provides a timely update to the *Census of Population and Housing,* and can function as Council's major source of data on the community for inter-censal years.

The *Household Survey* includes an extensive range of questions on the characteristics, behaviours, needs, and expectations of the Whittlesea community. Whilst a significant proportion of the questions included in the *Household Survey* have remained consistent over time to ensure that time series analysis can be provided, the range of questions included in the *Household Survey* is continually evolving to ensure the research provides the range of information best suited to the current requirements of Council and the other core users of the data.

The 2017 *Household Survey* provides some insight into the following:

- ***Demographic profile*** – including age, gender, country of birth, language, household size, household structure, income, disability, and carers.
- ***Education*** – including attendance at educational institutions and qualifications.
- ***Employment*** – including employment status, occupation, industry, employment location, satisfaction with current employment situation, barriers to finding employment, and working from home.
- ***Transport*** – including journey to work and study, commuting times, ease of transport methods, frequency of walking, time spent walking, reasons for walking, factors to encourage more walking, and perceptions of walking in the City of Whittlesea.
- ***Health and recreation*** – including participation in leisure, arts, and cultural activities, participation in sports and recreation activities, participation in community groups, volunteering, and use of local open space.
- ***Housing*** – including dwelling structure, housing situation, housing payments, period of residence, potential emigration, and internet connection from home.
- ***Living in the neighbourhood*** – including importance of and satisfaction with aspects of location, services, and lifestyle in the decision to live in the neighbourhood.
- ***Health and human services*** – including access to and barriers to accessing health, human and other services, and educational services in the City of Whittlesea.
- ***Retail trade*** – including destinations for shopping for daily needs, groceries, clothing and comparison goods, and larger household goods, and dining out and entertainment.
- ***Current issues*** – including the top three issues for Council to address in the coming twelve months.

This *Highlights Bulletin* has been prepared to provide a brief overview of the results, with an emphasis on key findings, variation across the municipality, and change over time.

Readers are encouraged to refer to the *Municipal Report* for a detailed discussion of all results from the survey, and to contact the Community Building and Planning Department, City of Whittlesea directly to discuss the application of the data presented in this report to specific situations.

## 1.1 Methodology

The City of *Whittlesea – 2017 Household Survey* was designed in the style of the Australian Bureau of Statistics' *Census of Population and Housing*, with some changes in emphasis and the inclusion of a wide range of questions designed specifically to meet the information needs of Council and the Whittlesea community.

The 2017 *Household Survey* was a self-assessment survey distributed primarily via a drop-off and pick-up methodology over a number of weekends in May, June and July 2017. All survey drop-offs were conducting during the weekends, and the pick-ups were all completed during the weekdays.

A mail-out and reply-paid methodology was employed for households located within the Rural North precinct of the City of Whittlesea, due to occupational health and safety and efficiency reasons.

A total of 1,862 surveys were distributed using the drop-off and pick-up methodology in the ten urban precincts of the City of Whittlesea, and 464 were distributed to the Rural North precinct using a mail-out and reply paid service.

An approximately equal number of surveys were distributed in each of the ten urban precincts of the City of Whittlesea in order to maximise the statistical strength at the precinct level, particularly for the smaller precincts. Results were then weighted by precinct population and number of households to ensure that each precinct contributed proportionally to the municipal results.

Responses were obtained from every individual in the household for thirty-five questions, including children where appropriate, as well as responses from the household as a whole for seventeen blocks of questions (comprising 153 individual questions). The 2017 *Household Survey* therefore included a total of 188 separate questions.

Additional details are available in the *Municipal Report*.

## 1.2 Metropolis Research

The Research Team of the City of Whittlesea commissioned Metropolis Research to conduct the *City of Whittlesea – 2017 Household Survey*.

Metropolis Research prepared both this *Highlights Bulletin* and the *Municipal Report* under instructions from officers of the City of Whittlesea.

## 1.3 Explanatory notes and glossary of terms

The following are explanatory notes regarding the presentation of the results in this report.

### 1.3.1 Geography

In addition to a municipal overview for the City of Whittlesea, analysis of precinct level differences is included throughout the report. Precinct areas are defined based on the City of Whittlesea's Internal Place-based Geographic Planning Framework, which was introduced in 2016. The term 'precinct' is used by Metropolis Research to describe the results broken down for small areas as used in Council's *Census* profile.

The eleven precinct areas presented in this report include:

- Bundoora
- Doreen
- Epping
- Epping North
- Lalor
- Mernda
- Mill Park
- Rural North
- South Morang
- Thomastown
- Whittlesea Township

These precinct areas may or may not have the same boundaries as suburb areas. Some precinct areas fall within or cross-over suburb boundaries. Refer to the *Municipal Report* for additional details.

### 1.3.2 Definitions

*Measurable / statistically significant*

A measurable difference is one where the difference between or change in results is sufficiently large to ensure that they come from different samples, i.e. the difference is statistically significant. This is due to the fact that survey results are subject to a margin of error or an area of uncertainty. They do not describe or define whether the result or change is of a sufficient magnitude to be important in the evaluation of performance or the development of policy and service delivery. Statistical significance is calculated based on the 95% confidence interval as outlined in Section 1.4 of this report.

*Significant result*

Metropolis Research uses the term *significant result* to describe a change or difference between results that Metropolis Research believes to be of sufficient magnitude that they may impact on relevant aspects of policy development, service delivery and the evaluation of performance. Some results may be significant but not measurably different, and in some other cases a result may be both measurable and significant, and both terms may be used.

*Subjective terms*

Metropolis Research uses a range of other subjective terms to describe data in this report. This includes most often statements such as "somewhat, albeit not measurably". These terms describe results that may not be statistically significant due to sample size or a range of other factors, but which nonetheless may well be meaningful to readers, and which Metropolis Research consider worthy of note in the analysis of the data. The term "marginal" is also used in some instances, where readers' attention is drawn to an interesting result that is not statistically significant, but worthy of note.

*Satisfaction categories*

Metropolis Research typically categorises satisfaction results to assist in the understanding and interpretation of the results. These categories have been developed over many years as a guide to the scores presented in the report and are designed to give a general context.

These categories are designed to be indicative of the level of satisfaction, and are based on a satisfaction scale from zero (very dissatisfied) to ten (very satisfied), where five is neither satisfied nor dissatisfied. They are generally defined as follows:

- ***Excellent:*** Scores of 7.75 and above are categorised as excellent
- ***Very Good:*** Scores of 7.25 to less than 7.75 are categorised as very good
- ***Good:*** Scores of 6.5 to less than 7.25 are categorised as good
- ***Solid:*** Scores of 6 to less than 6.5 are categorised as solid
- ***Poor:*** Scores of 5.50 to less than 6 are categorised as poor
- ***Very Poor:*** Scores of 5 to less than 5.50 are categorised as very poor
- ***Extremely Poor:*** Scores less than 5 are categorised as extremely poor.

*Other categories*

A range of other categories are used in this report relating to average agreement, average ease of access, and average importance. The other categories used in this report do not conform to the same ranges as the satisfaction scores, are more general in nature, and are discussed in more detail in the relevant sections.

## 1.4 Response rate

In 2017, a total of 2,326 household surveys were distributed. Of these 1,862 were distributed in person to selected households across the urban precincts of the municipality, and 464 were mailed to residents in the Rural North precinct.

Of these 2,326 distributed surveys, a total of 1,123 were ultimately returned for inclusion in the research, comprised of 3,121 individual respondents. This is an overall gross response rate of 48.3%, comprised of a gross response rate of 55.3% for the drop-off and pick-up component, and twenty percent for the mail out survey component.

## 1.5 Statistical strength

The total sample for the 2017 *Household Survey* was 1,123 households comprising 3,161 individual respondents.

The 95% confidence interval (margin of error) of these results varies for each individual result, but is broadly stated as follows:

- Municipal person results (of all respondents) – plus or minus 1.7% at the fifty percent level.
- Municipal household results – plus or minus 2.9% at the fifty percent level.
- Precinct person results (of all respondents) – plus or minus 5.7% at the fifty percent level.
- Precinct household results – plus or minus 9.5% at the fifty percent level.

In other words, if a yes / no question asked of every individual obtain a result of fifty percent yes, it is 95% certain that the true value of this result is within the range of 48.3% and 51.7%. The confidence interval is smaller the further the result is from the fifty percent level.

These figures are based on a total sample size of 1,123 respondent households and 3,161 individual respondents, and an underlying population of the City of Whittlesea of 66,529 households and 207,881 persons.

# 2. Demographic profile

## 2.1 Age and gender

- The median age of respondents in the 2017 *Household Survey* was 40 years, up on the 39 years recorded in recent years. This result has proved very stable over time.
- This result is higher than the 2016 *Census* result of 34 years, which reflects the higher engagement of older residents compared to younger residents in completing voluntary surveys.
- The median age was measurably higher in Thomastown (46 yrs), Lalor (46 yrs), the Rural North (45 yrs), and Whittlesea Township (44 yrs) and lower in the growth area precincts of Epping North (34 yrs) and Mernda (33 yrs).
- The *Household Survey* obtained close to a fifty / fifty split between male (49.6%) and female (50.2%) respondents. There were eight respondents that identified as other or were non-gender specific. There was no meaningful variation in gender observed across the municipality.

## 2.2 Household size and structure

- The average household size in 2017 was 2.89 persons per household, a result only very marginally lower than the 2016 *Census* (2.93).
- The average household size was measurably higher in Epping North (3.33), and lower in Lalor (2.57), Thomastown (2.48), and Whittlesea Township (2.39).
- A little less than half (48.2%) of respondent households were families with children, comprising mainly two-parent families (42.3%), but also a small proportion of one-parent families (5.9%). Whilst the proportion of two-parent families has varied marginally from year to year, the proportion of one-parent families has declined a little from 9.1% in 2002 to 5.9% in 2017.
- Almost one-third (30.1%) of respondent households were couple households without children, a result which has increased steadily over the last fifteen years from a low of 20.5% in 2002. The couple households without children are comprised of 4.8% young couples (aged 15 to 35 years), 8.5% middle-aged couples (aged 36 to 60 years), and 16.6% older couples (aged 61 years and over).
- A little more than ten percent (13.7%) of respondent households were sole person households, a result that has remained relatively stable over the last fifteen years. The sole person households were comprised of 2.1% young persons, 5.7% middle-aged persons, and 5.8% older persons.
- There was significant variation in the household structure observed across the precincts, including a measurably higher than average proportion of two-parent families in South Morang (51.6%), couple households without children in Lalor (37.9%), the Rural North (37.6%), and Epping North (23.1%), and sole person households in Whittlesea Township (30.3%), Thomastown (23.8%), and the Rural North (20.4%).

## 2.3 Diversity

- A little less than half (41.7%) of respondents were born overseas, with most of these (31.7%) born in a mainly non-English speaking country. A little more than half (58.3%) were born in Australia, a result almost identical to the 2016 *Census* (58.4%).
- This result is higher than the 37.1% reported in the 2016 *Household Survey*, and is the highest proportion of overseas born respondents reported in the *Household Survey* program.
- There was measurable and significant variation in this result observed across the City of Whittlesea:
    - Respondents from Thomastown (50.7%), Lalor (50.4%), and Epping North (48.4%) were measurably more likely than average to be born overseas. Most of these respondents were born in mainly non-English speaking countries.
    - Respondents from the Rural North (18.7%), Whittlesea Township (9.5%) and Doreen (5.8%) were measurably less likely to be born overseas and of those that were the majority were born in mainly English speaking countries.
- The most common countries of birth (excluding Australia) were India (7.3% up from 3.0% in 2016), Italy (3.9%), Macedonia (3.2%), and Greece (2.1%).
- Consistent with the results recorded in previous years, approximately one percent (0.8% down from 1.0%) of respondents identified as Aboriginal or Torres Strait Islander. This result is identical to the 2016 *Census* result of 0.8%.
- Approximately one-third (33.5%) of respondents prefer to speak a language other than English at home, up measurably on the 30.6% recorded in 2016. This is the largest proportion of non-English speaking respondents recorded in the *Household Survey* program. It is noted that senior citizens (aged 76 years and over) were measurably and significantly more likely than average to prefer to speak a language other than English at home (53.8%).
- This result is however lower than the 2016 *Census* result of 44.1%. Voluntary surveys such as the *Household Survey* will under-represent non-English speaking residents, due to reasons which are discussed in more detail in the *Municipal Report*.
- There was measurable variation in the proportion of respondents that prefer to speak a language other than English at home observed across the municipality. Respondents from Thomastown (56.2%), Lalor (50.6%), and Epping North (46.2%) were measurably more likely than average, and respondents from the Rural North (6.4%), Whittlesea Township (4.0%), and Doreen (2.5%) were measurably and significantly less likely to prefer to speak a language other than English at home.
- In 2017 the languages most commonly spoken at home (excluding English) were southern Asian languages, which include mainly Indian languages (9.2% up from 6.1% in 2016), southern European (5.8%), and eastern European (4.5%) languages.
- There was measurable and significant variation in the languages spoken across the municipality, including a measurably higher than average proportion of southern Asian languages spoken in Epping North (21.1%), southern and eastern European languages in Lalor (17.1%), Thomastown (23.1%), and Epping (18.4%), and southeast Asian languages in South Morang (9.5%).

## 2.4 Income

- The median personal annual income (from all sources) of respondents aged 15 years and over was $31,044, an increase of 13.1% on the 2016 median of $27,456, and 38.5% higher than the 2007 median of $22,412.

- This result was one percent higher than the 2016 *Census* median income of $30,732, which is a result that reflects very well on the reliability of the *Household Survey*.

- The median personal income (from all sources) varied substantially across the municipality, with respondents from Rural North, Mernda, South Morang, Doreen, and Bundoora reporting a measurably higher median income, and respondents from Lalor and Thomastown reporting a measurably lower median income than the municipal median.

- The median personal annual income of full time and self employed respondents aged 15 years and over was $56,940 in 2017, an increase of 5.5% on the 2016 median of $53,976. Since this result was included in the report in 2014, the median income of full time and self employed respondents has increased by 10.3%.

- There was measurable and significant variation in the median income of full time and self employed respondents observed by gender and language spoken at home:

  - ***Gender*** – the median annual income of full time / self employed males was 14.3% higher than females. This gender pay gap is higher than the 9.6% gap recorded in 2016, but lower than the 24.5% gender pay gap recorded in 2015.

  - ***Language spoken at home*** – the median annual income of full time / self employed English speaking respondents was 27.9% higher than that of non-English speaking respondents. This gap has widened in recent years, up from 22.5% in 2016 and 20.2% in 2015.

## 2.5 Disability and carers

- There was some variation in the disability question in 2016 compared to previous years and 2017. In 2016 the survey included the term “disability or medical condition”. As a result of this, the 2016 results are not consistent with other years.

- The proportion of respondents that identify as having a permanent or long-term disability declined in 2017 compared to earlier years, down from 13.6% in 2014 and 17.9% in 2015 to be 11.6% in 2017. This decline is at odds with the longer-term trend of increasing rates of identification with disability that has been observed in the *Household Survey* program over the last fifteen years.

- There was a clear relationship between the respondents’ age group and their likelihood to identify as having a disability, from a low of 2.7% of young children (aged 0 to 4 years) to a high of 41.3% of senior citizens (aged 76 years and over).

- There was measurable variation in the rate of disability observed across the municipality, with respondents from Thomastown (18.3%), Lalor (17.4%), and Whittlesea Township (16.1%) measurably more likely to identify as having a disability, and respondents from Mernda (5.0%) measurably less likely.

- The most common forms of disability in 2017 were mental health (3.8%), hearing impairment (3.2%), and mobility (2.2%), results that have been stable over time.

- In 2017 a little less than half (43.4%) of respondents with a disability reported that they needed assistance with their disability, an increase on the 30.0% recorded in 2015. The main forms of assistance were emotional support (24.6%), self-care activities (15.8%), and financial support (15.3%). The large increase in this result this year is likely to reflect the fact that fewer respondents identified as having a disability this year.

- Ten percent of respondents aged 15 years and over reported that they care for someone to allow that person to stay in their own home, down a little on the 13.7% recorded in 2016.

- Approximately one-third (32.4% up from 32.0%) of respondents aged 15 years and over reported that they spend any time caring for a child / children aged under 15 years without pay, with most of these (21.3%) caring for their own children, or their own grandchildren (8.7%).

- Adults (aged 36 to 44 years) were measurably and significantly more likely than other age groups to care for a child or children without pay (mostly their own children, with almost two-thirds (64.6%) caring for a child or children.

- There was measurable variation in this result observed across the municipality, with respondents from Epping North (31.7%) and Mernda (33.0%) measurably more likely to care for their own children, and respondents from Lalor (77.4%) and Thomastown (73.9%) the most likely to not care for a child or children.

# 3. Education and employment

## 3.1 Education

- The proportion of respondents currently attending an educational institution has remained relatively stable at a little less than one-third (31.1%) since 2014, and was 31.6% in 2017. Prior to 2014, this proportion had been steadily increasing from a low of 17.0% recorded in the first *Household Survey* in 1997.

- A little less than ten percent (7.8%) of respondents attending an educational institution were attending preschool / kindergarten, a little more than one-fifth (21.9%) primary school, one-quarter (24.8%) secondary school, a little more than ten percent (13.5%) TAFE / similar institutions, and a little more than one-quarter (25.6%) were attending university.

- Over time, the proportion of respondents attending university has increased substantially: from an average of around twelve percent over the period 1997 to 2012, to an average closer to one-quarter in recent years.

- There was measurable variation in the educational institutions attended by respondents observed across the municipality:
  - Mernda (13.1%) respondents were measurably more likely to attend preschool / kindergarten.
  - Rural North (44.1%), Doreen (38.1%), Whittlesea Township (36.8%), and Mernda (32.1%) respondents were measurably more likely to attend primary school.
  - South Morang (35.6%) and the Rural North (30.1%) respondents were measurably more likely to attend secondary school.
  - Thomastown (22.8%) and Lalor (20.3%) respondents were measurably more likely to attend TAFE / similar institutions.
  - Mill Park (36.4%) respondents were measurably more likely to attend university.

- Over the course of the *Household Survey* program since 1997, the proportion of respondents aged 15 years and over with no post-secondary school qualification has declined measurably and significantly, halving from a high of more than half (57.5%) in 1997 to a little more than one-quarter (28.3%) in 2017. This is the lowest proportion of respondents with no post-secondary school qualification recorded by the *Household Survey*.

- The likelihood of having a post-secondary school qualification clearly declines with the respondents age group, from 85.5% of young adults (aged 20 to 35 years) to 22.6% of senior citizens (aged 76 years and over). However as the proportion of the population attending higher education continues to increase, the older age groups in the City of Whittlesea are becoming more likely over time to have a post-secondary school qualification.

- There was interesting variation in these qualification results observed by gender and language spoken at home:
  - ***Gender*** - Female respondents (31.2%) were measurably more likely than males (24.6%) to have a bachelor or higher degree, whilst male respondents (47.4%) were measurably more likely than females (35.3%) to have a certificate or diploma.
  - ***Language spoken at home*** - Non-English speaking respondents (36.9%) were measurably more likely than English speaking (23.4%) to have a bachelor or higher degree, whilst English speaking (46.7%) were measurably more likely than non-English speaking (30.0%) to have a certificate or diploma.

- There was measurable variation in the qualifications profile of respondents across the municipality, with respondents from Thomastown (38.9%) and Lalor (35.8%) measurably more likely to have no post-secondary qualification, and respondents from Whittlesea Township (23.8%), the Rural North (22.0%), and Doreen (19.5%) measurably more likely to have a certificate or diploma.

## 3.2 Employment

- The rate of participation in the labour market of respondents aged 15 years and over was 67.6% in 2017, up a little on the 64.3% recorded in 2016. This result is comprised of full time / self employed (41.4%), part time / casually employed (19.3%), employed and studying (2.4%), and unemployed (4.6%).

- These employment profile results have remained relatively stable over the course of the last five years.

- There was measurable variation in the employment profile of respondents across the municipality, with respondents from Whittlesea Township (31.1%), Thomastown (26.7%), and Lalor (26.0%) measurably more likely than average to be retired, respondents from Thomastown (7.5%) more likely to be unemployed, and respondents from Mernda (45.7%) more likely to be full time employed.

- Respondents were most likely to be employed as professionals (23.9%), clerical / administration workers (20.1%), and technicians / tradespersons (15.5%).

- Over the twenty years of the *Household Survey* program there has been a significant increase in the proportion of respondents employed as professionals (from seven percent in 1997 to 23.9% in 2017), and a significant decline in the proportion employed as labourers and related workers (7.7% in 2017 down from 18.5% in 1997).

- There was measurable variation in the occupation profile of respondents across the municipality with respondents from Epping North (32.9%) measurably more likely than average to be employed as professionals, Thomastown (13.2%) respondents more likely to be employed as labourers and related workers, Whittlesea Township (25.5%) respondents more likely to be employed as technicians / tradespersons, and Rural North (11.2%) more likely to be employed as managers and administrators.

- The top three industries of employment were healthcare and social assistance (16.6%), retail trade (10.4%), and construction (10.2%).

- Healthcare and social assistance has been the most common industry of employment in each of the last four *Household Surveys*. This is a significant change in the City of Whittlesea, as manufacturing was the most common industry of employment recorded in the *Household Survey* in five of the six years prior to 2012.

- There was measurable variation in the industries of employment across the municipality with respondents from Lalor (17.3%) and Bundoora (16.4%) measurably more likely to be employed in retail trade, respondents from Lalor (14.8%) more likely to be employed in manufacturing, respondents from Mernda (24.0%) more likely to be employed in healthcare and social assistance, and respondents from Doreen (20.0%) more likely to be employed in construction.

- A little less than one-third (32.6%) of employed respondents were employed in the City of Whittlesea, a result that has been reasonably consistent over the last five years, but which has grown from around one-quarter in 1997.

- There was measurable variation in the employment location of respondents across the municipality, with respondents from Whittlesea Township (48.8%) and Mernda (45.0%) more likely to be employed in the City of Whittlesea, respondents from Doreen (27.2%) and Bundoora (24.0%) more likely to be employed in the northeastern region, respondents from South Morang (12.5%) more likely to be employed in the inner eastern region, respondents from the Rural North (5.0%) more likely to be employed in regional / rural Victoria, and respondents from Doreen (12.0%) and the Rural North (11.9%) more likely to be employed in "various locations" (e.g. tradespersons that move from job to job).

- Approximately three-quarters (73.0%) of employed respondents were satisfied with their current employment situation. Respondents from the Rural North (80.6%) and Mill Park (80.1%) were measurably more likely to be satisfied, and respondents from Epping North (62.6%) measurably less likely to be satisfied. 6.6% were dissatisfied due to working "too few hours", and 6.1% due to working "too many hours".

- Approximately five percent (4.6%) of respondents aged 15 years and over were unemployed, and the most common barrier to finding employment was a lack of availability of jobs (47.1%). Other barriers to finding employment included discrimination (28.8%) and a lack of assistance (27.9%).

- Less than five percent (3.7%) of employed respondents had a home-based business, a result that has been relatively stable since it was first included in the *Household Survey* program in 2013. Respondents from the Rural North (16.1%) and Lalor (9.4%) were measurably more likely than average to work from home in a home-based business.

- A little more than one-fifth (20.8%) of employed respondents worked from home (other than in a home-based business), with most (19.3%) sometimes working from home, and only a small number (1.5%) always working from home. Respondents from Whittlesea Township (28.0%) and South Morang (25.7%) were measurably more likely to at least sometimes work from home.

# 4. Transport

## 4.1 Journey to work

- Consistent with the results recorded over the twenty years of the *Household Survey* program, more than four-fifths (83.5%) of respondents either drove or were driven to work by car.

- There was measurable and significant variation in the method of journey to work based on the location of employment, with almost half (49.7%) of respondents employed in the inner Melbourne region (the CBD and inner suburbs) travelling to work by a method that includes a form of public transport, mainly "car and public transport" (19.7%) and train (23.3%). "Car and public transport" in many cases refers to driving to a train station and then travelling to work by train.

- There was only a little measurable variation in this result observed across the municipality, with respondents from Epping North (9.6%) measurably more likely to journey to work by "car and public transport", and respondents from Whittlesea Township (87.4%) more likely to drive to work.

- A little more than one-third (36.3%) of employed respondents took less than half an hour to commute to and from work each day (two-way combined) and almost one-sixth (15.4%) took ninety minutes or more.

- The commuting times varied dramatically by both the method of journey to work and the employment location. Particular attention is drawn to the fact that respondents driving to work by car (39.0%) were measurably more likely to take less than thirty minutes to commute to and from work per day, compared to those travelling by car and public transport (18.8%), multiple public transport modes (7.1%) or by train (0.8%).

## 4.2 Walking

- A little more than one-third (39.9%) of respondents regularly (at least fortnightly) "walk to get to destinations", with 14.9% walking daily, 14.3% two to three times per week, 8.8% weekly and 1.9% fortnightly, and a little less than half (43.5%) of respondents reported that they never "walk to get to destinations".

- There was measurable variation in this result observed by respondent profile, with children and adolescents (aged 5 to 19 years) measurably more likely than average to frequently walk to get to destinations, and middle-aged adults (aged 46 to 60 years) measurably less likely to frequently walk to get to destinations.

- At the precinct level, little meaningful variation was observed amongst respondents living in the urban precincts of the City of Whittlesea, however respondents from Whittlesea Township (63.1%) were measurably more likely than average to frequently walk to get to destinations, and respondents from the Rural North (64.2%) measurably more likely to never walk to get to destinations.

- Of the respondents that at least sometimes walk to get to local destinations, a little more than one-fifth (21.3%) typically spent less than one hour per week, and less than ten percent (8.3%) typically spent ten hours or more per week walking to get to local destinations.

- The top four reasons for walking were for leisure / fitness (61.8%), shopping (40.5%), to / from school / study (19.5%), and to / from work (12.6%).

- When asked how easy it was to get to local places when needed by four different types of transport, on average respondent households rated the ease of walking (5.72 out of ten) measurably and significantly lower than car (7.82) and public transport (6.39), and similar to the ease of cycling (5.83).

- The top four most common factors that may encourage respondents to walk more frequently were better lighting (28.8%), more walking tracks (27.0%), better footpath connections (25.2%), and better footpaths / walking tracks (23.4%).

- When asked to rate their agreement with five statements about walking in the City of Whittlesea on a scale from zero (strongly disagree) to ten (strongly agree) where five is neither agree nor disagree, respondent households reported:

    - ***Solid agreement*** – that walking to shops, key destinations and public transport is direct and easy (6.57), when walking I / we feel safe and protected from traffic (6.24), I / we can find my way to key destinations in Whittlesea (6.12), and paths, streetscapes and parks are well maintained (6.09).

    - ***Mild Agreement*** – that there are good facilities in Whittlesea for walking (5.36).

- At the precinct level respondent households from Epping, Bundoora, and Whittlesea Township rated agreement with all five statements about walking at least somewhat higher than the municipal average. Respondent households from the Rural North rated agreement with each statement measurably and significantly lower than the municipal average.

# 5. Health and recreation

## 5.1 Participation in leisure, arts and cultural activities

- The overwhelming majority (89.7%) of respondents aged 5 years and over participated in at least one of the seventeen leisure, arts, and cultural activities listed on the survey form (including "other" activities).

- The five activities in which respondents most commonly participate were going to restaurants / cafes (66.8%), going to the cinema (59.3%), reading (41.8%), social media (36.9%), and gardening (30.2%).

- There was measurable variation in the leisure, arts, and cultural activities in which respondents participate observed across the municipality, with details provided in the *Municipal Report*.

- At the precinct level however it is noted that respondents aged 5 years and over from South Morang (95.4%), Whittlesea Township (95.1%), and Mill Park (94.9%) were measurably more likely to participate in at least one leisure, arts, or cultural activity, whilst respondents from Thomastown (79.9%) were measurably less likely to participate in at least one activity.

## 5.2 Participation in sports and recreation activities

- A little less than three-quarters (72.7%) of respondents aged 5 years and over participated in at least one of the twenty-two sports and recreational activities listed on the survey form (including "other" activities").

- The top three sports and recreation activities in which respondents participate were walking / running (47.3%), swimming (17.4%), and gym / group fitness (16.3%). These were the only three activities in which more than ten percent of respondents aged 5 years and over participated in 2017, as well as in 2013, 2014, and 2015.

- There was a measurable increase in 2017 compared to previous years in the proportion of respondents aged 5 years and over participating in swimming, up from an average of approximately twelve percent in 2013, 2014, and 2015 to a little less than one-sixth (17.4%) in 2017.

- There was measurable variation in the sports and recreational activities in which respondents participate observed across the municipality, with details provided in the *Municipal Report*.

- At the precinct level however it is noted respondents aged 5 years and over from Mill Park (81.8%), Bundoora (79.3%), and the Rural North (78.4%) were measurably more likely than average to participate in at least one sports or recreational activity, whilst respondents from Lalor (65.9%) and Thomastown (59.5%) were measurably less likely to participate in at least one activity.

## 5.3 Participation in community groups and volunteering

- In 2017 a little less than half (47.0%) of respondents reported that they participate in at least one type of community group. This result has remained relatively stable at an average of around half since this question was first included in this format in the *Household Survey* program in 2013.

- Respondents from the Rural North (57.5%) and Whittlesea Township (57.2%) were measurably more likely than average to participate in at least one community group, whilst respondents from Thomastown (31.4%) were measurably and significantly less likely than average to participate in at least one type of community group.

- The three most common types of community groups in which respondents participate remain the same as in previous years, those being Church / religious groups (17.0%), sports clubs (14.4%), and gym or exercise groups (12.3%). These were the only three types of groups that in which more than ten percent of respondents have consistently participated since 2013.

- A little less than one-sixth (15.3%) of respondents aged 15 years and over volunteer, with 10.9% volunteering locally and 5.1% volunteering non-locally. Some respondents volunteer both locally and non-locally. This result has increased marginally over time in the *Household Survey* from ten percent in 2013 to 15.3% in 2017.

## 5.4 Use of local open spaces

- In 2017, approximately two-thirds (67.1%) of respondent households frequently (weekly or fortnightly) visit walking / cycling paths, a little more than one-third frequently visit playgrounds (39.0%), sports reserves (37.4%), and informal open grassed areas (31.2%), a little less than one-sixth frequently visit picnic facilities (14.5%) or dog off-leash areas (16.1%), and four percent frequently visit skate facilities.

- There was significant variation in the use of local open spaces observed across the municipality, with details provided in the *Municipal Report*.

# 6. Housing

## 6.1 Dwelling type, housing situation, and payments

- The *Household Survey* program has consistently recorded approximately ninety percent of respondent households living in separate detached houses (91.7% in 2017).

- Respondent households in Thomastown (7.7%) and Mernda (7.1%) were more likely to live in a townhouse or duplex, and respondents from Epping (10.3%) were more likely to live in a multi-unit, apartment, flat, or shop top housing.

- The overwhelming majority of respondent households either owned their home (40.8%) or were purchasing their home (42.7%), with 14.1% renting their home privately. Despite a little variation from year to year, over time these results have proved quite stable.

- There was measurable variation in the housing situation observed across the municipality:

    - ***Home owners*** - respondent households from Lalor (63.5%), the Rural North (60.2%), and Thomastown (59.0%) were measurably more likely to own their home.

    - ***Mortgagees*** - respondent households from Mernda, (62.4%), Epping North (58.3%), South Morang (55.7%), and Doreen (50.6%) were measurably more likely than average to be purchasing their home.

    - ***Rental*** – respondent households from Epping (23.0%), Mernda (22.4%), and Lalor (21.2%), were measurably more likely to be renting their home.

- The median weekly housing cost of respondent households in 2017 was $393, an increase of 4.8% on the $375 recorded in 2016.

    - The median weekly mortgage payment was $432 per week in 2017, an increase of 2.2% on the 2016 median of $423.

    - The median weekly rental payment was $358 per week in 2017, an increase of 4.1% on the 2016 median of $344.

## 6.2 Period of residence and potential emigration

- Consistent with the results over the course of the *Household Survey* program, approximately one-third (36.5% in 2017) of respondents had lived at their current address for less than five years, and approximately two-thirds (63.5% in 2017) for five years or more, with most of those (39.3% in 2017) living at their current address for ten years or more.

- There was measurable variation in the period of residence results observed across the municipality with particular attention drawn to respondents from Mernda (68.5%) and Doreen (50.0%) who were measurably more likely to have lived at their current address for less than five years.

- Of the respondents who had lived at their current address for less than five years, approximately half (50.9%) had previously lived in the City of Whittlesea, and a further one-fifth (21.7%) had previously lived in the northeastern region of Melbourne (the region containing the City of Whittlesea). This has been a very consistent result recorded over the twenty years of the *Household Survey* program.

- A little more than ten percent (11.7%) of respondents expect to definitely (4.1%) or possibly (7.6%) move from their current dwelling in the next twelve months.

- Young adults (aged 20 to 35 years) (19.5%) and adults (aged 36 to 45 years) (16.6%) as well as young children (aged 0 to 4 years) (23.2%) were the most likely to potentially move from their current address in the next twelve months. The young children are clearly the children of the young adults and adults who may be potentially moving.

- It is important to note that the *Household Survey* program has consistently found that older adults (aged 61 to 75 years) (3.7%) and senior citizens (aged 76 years and over) (2.6%) were the least likely to potentially move from their current address in the coming twelve months.

- Approximately three-quarters (77.5%) of respondents potentially moving from their current address in the next twelve months will potentially remain within the northeastern region of Melbourne (the region containing the City of Whittlesea), with more than half (55.0%) potentially staying in the City of Whittlesea, and a further 22.5% staying within the northeastern region.

## 7. Living in the neighbourhood

- Respondent households were asked to rate both how important each of twenty-three aspects were to them in their decision to live in their neighbourhood, and how satisfied they were with each of these aspects. These aspects have been broken down into three groups for ease of analysis, those relating to location, those relating to access to services and spaces, and lifestyle related aspects.

- Respondent households were asked to rate their agreement on a scale from zero (very unimportant) to ten (very important), where five is neither important nor unimportant. Satisfaction was asked on the scale from zero (very dissatisfied) to ten (very satisfied) where five was neither satisfied nor unsatisfied.

## 7.1 Location

- The average importance of each of these eight aspects in the decision to live in the neighbourhood can best be summarised as follows:
    - ***Very High Importance*** – respondent households on average considered a convenient location (8.22) to be of very high importance.
    - ***High Importance*** – respondent household on average considered access to major roads and freeways (7.92), access to public transport (7.81), proximity to family and / or friends (7.62), proximity to schools (7.49), proximity to work (7.46), and access to walking / cycling paths (7.21) to be of high importance.
    - ***Moderate Importance*** – respondent households on average considered proximity to University / TAFE / similar institutions (6.41) to be moderately important.
- Whilst on average respondent households were satisfied with each of the eight location-related aspects in relation to their neighbourhood, the level of satisfaction with each can best be summarised as follows:
    - ***Very Good*** – for proximity to schools (7.37) and convenient location (7.28).
    - ***Good*** – for proximity to family / friends (7.20), access to public transport (6.76), and access to walking / cycling paths (6.75).
    - ***Solid*** – for access to major roads and freeways (6.18), proximity to University / TAFE / similar institutions (6.10) and proximity to work (6.05).
- There was measurable and significant variation in both the importance and satisfaction of location aspects observed across the municipality, with full details available in the *Municipal Report*.

## 7.2 Accessibility of services and spaces

- The average importance of each of these six aspects in the decision to live in the neighbourhood can best be summarised as follows:
    - ***Very High Importance*** – respondent households on average considered access to local shops and supermarkets (8.64) and access to quality parks and open spaces (8.03) as of very high importance.
    - ***High Importance*** – respondent households on average rated access to entertainment / cafes and restaurants (7.61), and access to sports and recreation (7.27) to be of high importance.
    - ***Moderate Importance*** – respondent households on average rated access to community centres (6.55) and access to childcare / kindergarten (6.41) to be of moderate importance.
- Respondent households were on average satisfied with each of the six aspects related to the accessibility of services and spaces within their local neighbourhood.

- Satisfaction with these six aspects can best be summarised as follows:
    - ***Excellent*** – for access to local shops and supermarkets (8.07).
    - ***Very Good*** – for access to quality parks / open spaces (7.43).
    - ***Good*** – for access to entertainment / cafes and restaurants (6.89), access to sports and recreation (6.84), access to community centres (6.68), and access to childcare / kindergarten (6.65).
- There was measurable and significant variation in both the importance and satisfaction of the accessibility of services and spaces aspects observed across the municipality, with full details available in the *Municipal Report*.

## 7.3 Lifestyle

- The average importance of these nine aspects in the decision to live in the neighbourhood can best be summarised as follows:
    - ***Very High Importance*** – for safety of the neighbourhood (8.75), attractive neighbourhood (8.34), friendly and welcoming for children and families (8.31), affordable lifestyle (8.27), leafy, treed, and green neighbourhood (8.20), and environmentally sustainable lifestyle (8.15).
    - ***High Importance*** – for the neighbourhood being friendly and welcoming for older people (7.87) and friendly and welcoming for people with a disability (7.61).
- Respondent households were on average satisfied with each of the nine lifestyle related aspects of living in the neighbourhood. Satisfaction with these nine aspects can best be summarised as follows:
    - ***Very Good*** – for the neighbourhood being friendly and welcoming for children and families (7.37), and friendly and welcoming for older people (7.29).
    - ***Good*** – for leafy, treed, and green neighbourhood (7.14), affordable lifestyle (7.14), attractive neighbourhood (7.04), environmentally sustainable lifestyle (6.96), and friendly and welcoming for people with a disability (6.83).
    - ***Solid*** – for affordable housing choices (6.48) and safety of the neighbourhood (6.41).
- There was measurable and significant variation in both the importance and satisfaction of the lifestyle aspects observed across the municipality, with full details available in the *Municipal Report*.

## 7.4 Overall satisfaction with the neighbourhood

- The average satisfaction with how well living in the neighbourhood has met respondent households' expectations before they moved into the neighbourhood was rated at 7.42 out of a potential ten, a level of satisfaction categorised as "very good".

- A little less than three-quarters (70.7%) of respondent households answering this question were very satisfied (rating satisfaction from seven to ten), a little more than one-fifth (21.6%) were neutral to somewhat satisfied (rating five or six), and less than ten percent (7.8%) were dissatisfied (rating zero to four).

- There was measurable variation in overall satisfaction with how living in the neighbourhood met expectations observed across the municipality, with respondent households from Whittlesea Township (8.19) rating satisfaction measurably higher and at a level categorised as "excellent". Respondent households from Epping North (7.04), Mernda (6.92), and Lalor (6.84) rated satisfaction somewhat, albeit not measurably lower and at levels categorised as "good".

# 8. Health and human services

- Respondent households were asked a range of questions around accessibility of selected health and human services. Respondent households were asked to select all the services that members of the household had accessed / used in the last twelve months, then to select all the services that they required but could not access and the reasons why they could not access these services, and were then asked to rate the accessibility on a scale from zero (very difficult) to ten (very easy).

- The services included on the survey form have been broken into three groups: five health services; seven human and other services; and five educational services.

## 8.1 Health services

- There was no measurable variation in the average ease of access to health services results observed between 2016 and 2017. The average ease of accessing these services can best be summarised as follows:
  - ***Very Easy*** – respondents rated access to doctors (7.95 up from 7.85) and dentists (7.43 up from 7.22) as on average very easy.
  - ***Solidly Easy*** – respondents rated access to other health services (6.94 up from 6.70) and hospitals (6.53 down from 6.59) as on average solidly easy.
  - ***Mildly Easy*** – respondents rated access to mental health services (5.34 up from 5.14) on average as mildly easy.

- The overwhelming majority (87.6%) of respondent households had accessed at least one of the five listed health services, with doctors (82.2%) the most commonly accessed health service and mental health services (5.6%) the least accessed service.

- A little more than ten percent (12.9%) of respondent households reported that they required but could not access at least one health service, with doctors (5.7%) the service most commonly required but not accessed.

- Respondent households from Epping and Bundoora tended (in some but not all cases) to rate the ease of access somewhat higher than the municipal average, whilst respondent households from Thomastown and in particular Mernda tended (in some but not all cases) to rate the ease of access somewhat lower than average.

## 8.2 Human and other services

- There were seven human and other services listed on the survey form, four of which were included in the 2016 survey. There was no measurable variation in the average ease of access for these four services observed between 2016 and 2017.
- The ease of access to the seven human and other services can best be summarised as follows:
  - ***Moderately Easy*** – respondent households rated access to aged care services (6.16) as moderately easy.
  - ***Mildly Easy*** – respondent households rated access to disability support services (5.51), Centrelink office (5.42), financial and legal support services (5.33), respite services (5.23), and other social services (5.19) as mildly easy.
  - ***Mildly Difficult*** – respondent households rated access to a Medicare office (4.63) as mildly difficult on average.
- A little more than one-third (38.1%) of respondent households had accessed at least one of these seven human and other services in the last twelve months, with a Centrelink office (26.2%) and a Medicare office (16.9%) the most commonly accessed.
- Almost ten percent (9.6%) of respondent households reported that they required but could not access at least one of the seven human and other services in the last twelve months, with a Medicare office (4.7%) and a Centrelink office (3.6%) the two most commonly required but not accessed.
- Respondent households from Epping, Lalor, and Bundoora tended (in some but not all cases) to rate the ease of access somewhat higher than the municipal average, whilst respondent households from Doreen, Mernda, Whittlesea Township, and the Rural North tended (in some but not all cases) to rate the ease of access somewhat lower than average.

## 8.3 Educational services

- There were five educational services included on the survey form, and all were included in both 2016 and 2017. There was no measurable variation in the ease of accessing these five educational services observed between 2016 and 2017.
- The ease of accessing these educational services can best be summarised as follows:
  - ***Very Easy*** – respondent households on average rated the ease of accessing primary (7.86) and secondary schools (7.25) as very easy.
  - ***Moderately Easy*** – respondent households on average rated the ease of accessing 4 year old kindergarten (6.99) and childcare (6.30) as moderately easy.
  - ***Mildly Easy*** – respondent households on average rated the ease of accessing post secondary school education (5.98) as mildly easy.

- A little more than one-third (36.4%) of respondent households had accessed at least one of these five educational services in the last twelve months, with primary (18.5%) and secondary (13.4%) schools the most commonly accessed.

- Less than three percent (2.6%) of respondent households reported that they required but could not access at least one of these five educational services in the last twelve months, with childcare (1.1%) the most commonly required but not accessed.

- There was no measurable variation at the precinct level in the ease of accessing childcare, 4 year old kindergarten, primary and secondary schools observed across the municipality.

- Respondents from Epping (8.0), Bundoora (7.58), and Mill Park (7.17) rated the ease of access to post-secondary school education measurably higher than the municipal average (5.98), whilst respondent households from Doreen (4.35) and Mernda (4.05) rated it measurably lower.

# 9. Retail trade

- Respondent households were asked to identify from a pre-coded list of twenty-five retail centres (including online shopping and "other centres") all the centres they visit most often for daily shopping needs (e.g. bread and milk), regular grocery shopping, clothing and comparison goods shopping, larger household goods shopping (e.g. whitegoods), and dining out and entertainment.

- The top five centres for daily shopping needs were Plenty Valley Westfield (20.0%), Pacific Epping (16.0%), Mill Park Stables (15.5%), Lalor Shopping Centre (10.5%), and Laurimar Town Centre (10.2%).

- The retail centres visited most often by respondent households for grocery shopping were Plenty Valley Westfield (32.6%) and Pacific Epping (28.3%).

- There was a measurable increase in 2017 in the proportion of respondent households visiting Plenty Valley Westfield (32.6% up from 29.6%), Laurimar Town Centre (10.2% up from 6.3%), Mernda Villages (8.0% up from 5.0%), and Lyndarum Town Centre (6.1% up from 2.8%) for grocery shopping. These increases are most likely largely reflecting the increasing population in the catchment areas for these centres.

- The retail centres visited most often for clothing and comparison goods shopping were dominated by Plenty Valley Westfield (46.7%), Pacific Epping (41.9%), University Hill Bundoora (35.4%), and Northland Shopping Centre (29.5%).

- It is also noted that the proportion of respondent households shopping for clothing and other comparison goods online has increased in each of the last three *Household Surveys* in which this option was included, up from 12.2% in 2014, 14.1% in 2016, to 17.0% in 2017.

- The top four retail centres respondent households visit most often for larger household goods shopping remain the same as in previous years including Northland Shopping Centre (18.4%), other Thomastown shops (17.6%), Pacific Epping (11.8%), and Plenty Valley Westfield (11.4%).

- The retail centres respondent households visit most often for dining out and entertainment are dominated by Pacific Epping (29.0%), Plenty Valley Westfield (24.1%), the Melbourne CBD (17.5%), and Northland Shopping Centre (13.4%).

## 10. Current issues for Council

- Respondent households were asked (as an open-ended question) to identify the top three issues for Council to address in the coming twelve months. The open-ended responses have been broadly categorised for ease of analysis and time series comparison. The verbatim comments received from respondents are available on request from Council.

- The top four issues identified by respondent households in 2017 remain the same as in 2016 and include traffic management (53.5%), road maintenance and repairs (19.6%), safety, policing, crime and drugs (14.3%), and public transport (12.6%).

- Particular attention in 2017 is drawn to the measurable and significant increase in the proportion of respondent households identifying traffic management related issues, which increased substantially from 28.3% in 2015, 38.5% in 2016 to be 53.5% in 2017. Metropolis Research notes that this result is more than double the 2016 metropolitan Melbourne average of 20.1%, and is also the highest proportion recorded by Metropolis Research in any municipality across metropolitan Melbourne. This result was most significant in Epping North (86.5%), South Morang (65.3%), Mernda (62.0%), and Doreen (61.3%).

- This category of "traffic management" includes primarily issues such as traffic congestion, commuting times, access to major roads and freeways, and similar issues. "Road maintenance and repairs" is a related category and tends to focus more on issues with the quality and provision of the road such as potholes. Clearly given these results are categorised from verbatim comments, there is inevitably some overlap in these issues.

- There was some significant variation in these results for the City of Whittlesea compared to the 2016 metropolitan Melbourne averages as recorded in the Metropolis Research *Governing Melbourne* research project:

  - ***More common in Whittlesea*** - issues that are significantly more commonly identified in the City of Whittlesea than the metropolitan Melbourne average include traffic management (53.5% compared to 20.1%), safety, policing, crime and drug related (14.3% compared to 8.6%), public transport (12.6% compared to 4.1%), and road maintenance and repairs (19.6% compared to 7.2%).

  - ***Less common in Whittlesea*** - issues that are significantly less commonly identified in the City of Whittlesea than the metropolitan Melbourne average include parking (8.5% compared to 16.5%), building, housing, planning and development related (3.5% compared to 9.1%), and the provision and maintenance of street trees (3.0% compared to 7.1%).

- There was measurable and significant variation in the top issues for Council to address observed across the municipality, with attention drawn to the following:

    - ***Traffic management*** – respondent households in Epping North (86.5%), South Morang (65.3%), Mernda (62.0%), and Doreen (61.3%) were measurably and significantly more likely than average to identify traffic management.

    - ***Road maintenance and repairs*** – respondent households from Doreen (33.3%), the Rural North (32.3%), Epping North (28.8%), and Mernda (27.2%) were measurably more likely than average to identify road maintenance and repairs.

    - ***Safety, policing, crime and drug related issues*** – respondent households from Lalor (23.3%) were measurably more likely than average to identify safety, policing, crime and drug related issues.

    - ***Public transport*** – respondent households from the Rural North (19.4%) and Whittlesea Township (18.5%) were measurably more likely than average to identify public transport.