

Living in Australia 2024: National Community Views Survey



Key Insights Report

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THANK YOU FOR DOWNLOADING LIVING IN AUSTRALIA - 2024

This report draws on the views of the more than 5,000 people who participated in .id's annual Living in Australia survey, and speaks to four themes we feel are critical to improving living standards across the Nation.

1

Introduction

2

Affordable decent housing

3

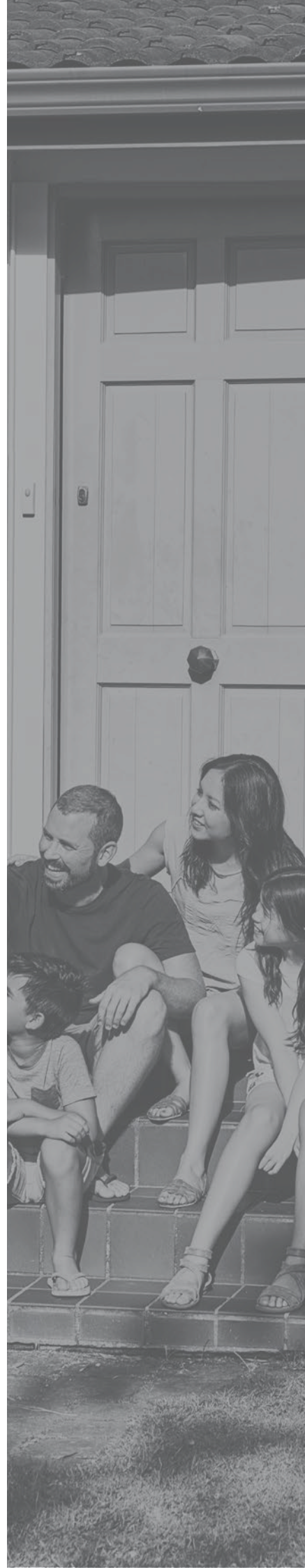
Feeling safe

4

Economics and cost of living

5

Environment and climate change



INTRODUCTION

Improving quality of life requires local area understanding and action

Just as the well-being of the entire body relies on the health of its individual cells and organs, Australia's national health relies on the vitality of its local areas. Each community, like a part of the body, performs essential and different functions that contribute to the overall system. If one organ is neglected or diseased, it impacts the body's overall health.

Similarly, if local communities' needs are ignored or under-resourced, it can detrimentally affect our national prosperity. Nurturing each local area through targeted actions – the right investments in the right place at the right time – will help the country in the collective, much like how caring for individual organs supports the health of the whole body.

Advancing our National Health extends well beyond growth in GDP

Australia, like many peer nations, has woken up to the fact that we need to understand and measure our national health in terms broader than GDP.

Our leadership – political, social, corporate – is demonstrating this shift by placing more emphasis on community wellbeing in decision making.

The current treasurer, Jim Chalmers, has been talking in these terms for years

In 2020, while in Opposition he said: “GDP matters and not for a moment do I think we should ditch it. But I do want you to consider how we could supplement it. Traditional measures have a place, but don't paint the whole picture. We can do more to measure what matters. If we do, we'll give ourselves a better chance to make the right calls on economic policy, for the right reasons.”

Measuring What Matters

Australia's First Wellbeing Framework

In 2023, as Treasurer he published the Measuring What Matters Statement, which included Australia's first National Wellbeing Framework. The Framework consists of five themes: Healthy, Secure, Sustainable, Prosperous, and Cohesive.

While the data used understand how the community is tracking against each Theme continues to evolve, we believe it sets a good series of lenses through which we can measure, act and advance our national health. But advancing national health begins with local area understanding.

.id understands Australia, from the local area up.

Understanding Australia's local areas is the mission for us at .id. We strive to provide leading tools and services for informing decisions that contribute to building better communities, from the local area up.

For more than 25 years we have supported all levels of government, utility providers, emergency services, and many private sector organisations to do just that.

We provide independent and accurate place-based information that quantifies demand for services, monitors the impact of policy changes, and helps represent residents best interests in decision making.

We have a range of datasets, services, tools and experts available to help people involved in location-based planning understand how current and future demographics, economics, housing trends and lived experiences impact local communities.

Digital tools for informed decision-making



National datasets to monitor and benchmark local area progress.



Consulting services informed by your needs

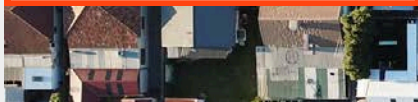




This Report speaks to four themes we feel are critical to improving living standards across the Nation. They are also themes we see present across local, state and federal government strategic documents, and we are proud to share what we've learnt about how these issues are being experienced across Australia in this report, **Living in Australia – 2024**.

1

Housing



The the provision of 'affordable decent housing' represents the single biggest inhibitor – and therefore opportunity – to advancing quality of life.

2

Safety



The ever-present and very human desire to 'feel safe', and the consequences for social cohesion and mental health when we don't feel safe in our local area.

3

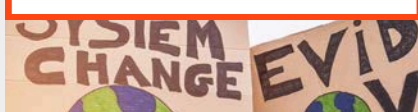
Cost of living



How Australians are feeling about their financial wellbeing, who is experiencing the 'cost-of-living crisis' more acutely and how this is changing over time.

4

Environment



Explores views on climate change, what we attribute it to, how and the extent to which it is expressing itself in our local areas, and the impact climate change will have on overall quality of life.



In 2021 we launched our Community Views service to help government and others better represent residents' values, experiences and future needs in strategic planning and advocacy decisions.

With a rich organisational history using demographics, economics and population futures to understand places and communities, the addition of our Views service complements this with a subjective resident perspective.

This combination of objective, empirical and modelled data with lived experiences means we can now provide our clients with a truly integrated understanding of their community and their place.

The Community Views service employs a survey-based approach and the standard questions we ask to understand local communities were created in direct response to what we observed as goals and themes across a diverse array of strategic planning documents. Community Views is delivered in partnership with leading social research consultancy, Ipsos.



What questions do you ask?

We use 16 attributes to understand community values and experiences - through which we quantify local area liveability and identify future needs. We also measure perspectives on health, wellbeing and financial circumstances, climate change, the top issues facing residents' local areas and what ideas they have to make their local area a better place to live. Clients are also welcome to ask custom questions of their community.

Our standard survey takes less than 10 minutes to complete and is collected using .id's leading social media advertising technique.

How do you analyse and report the data?

The data is analysed and reported through our leading online platform, views.id, which is also home to reports, presentations, videos and ongoing support. The diversity and utility of our deliverables reflects our desire to be inclusive and transparent with regard to analysis and reporting of data and insights. This disposition helps informed decision making while building Organisational reputation with the community.

Who subscribes to the Service?

We provide the service to a diverse and expanding range of councils and other organisations, many of whom repeat the survey annually or biennially to monitor how their community believes they are progressing against the themes and objectives set out across various strategic plans.



Living in Australia creates spatial benchmarking insights and data for Organisations that subscribe to our Community Views service.



Living in Australia collects the views of more than 5,000 people each year. This allows us to understand discrete perspectives across 21 x Regions – ranging from Far North Queensland to Greater Sydney, Hobart all the way over to Regional Western Australia.

It also provides us with the ability to understand how views compare and contrast based on spatial characteristics – for example Inner City residents vs those who live in Major Regional Cities and, of course, understand the role of Demography and Life-Stage.

We are proud that our approach ensures that all regions across Australia can be equitably represented through this survey, and that our ability to tell a National story is not limited just those who subscribe to our Community Views Service.

Living in Australia insights and data are made publicly available each year without fee.

The Living in Australia survey ...



Understands views across Regions, Typologies, Demography & Life-Stage.



Used as spatial benchmarking for Community Views clients.



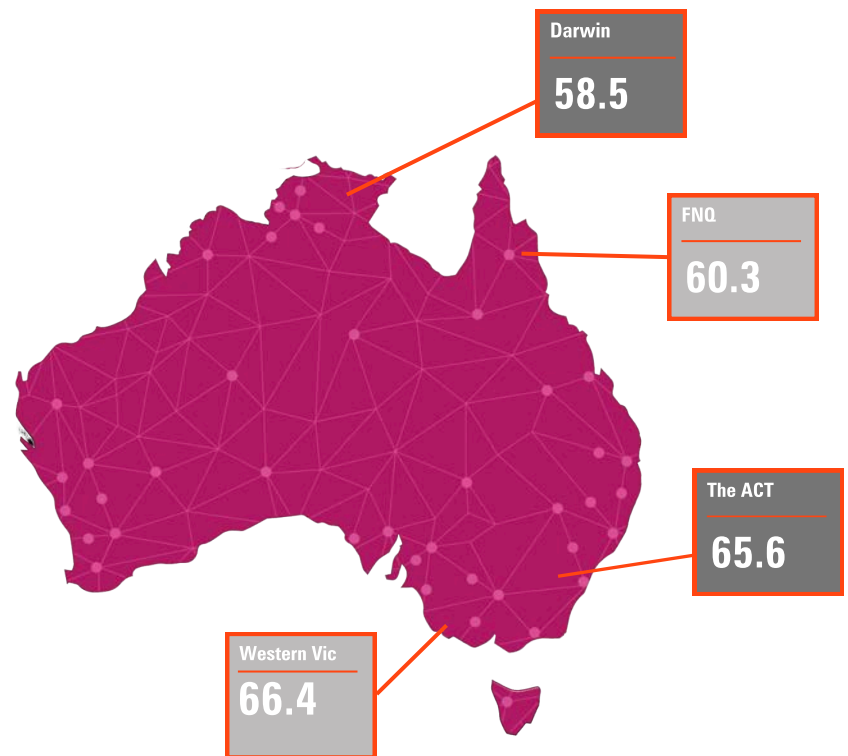
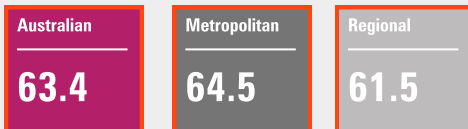
Annually updated and expanded to ensure contemporary context.



Insights and data made publicly available without fee.

What did we learn?

Overall Liveability Index (0-100)



Australia’s Overall Liveability in 2024 – which we can use as measure of National Health – was 63.4 out of a possible 100. That Index is created by combining residents’ values – what they believe contributes most towards making somewhere a good place to live with how they experience those attributes where they live.

While residents from Metropolitan Areas – on the whole – reported that their local areas were more liveable than Regional Areas, the reality is a lot more nuanced of course. Residents from The ACT delivered a significantly higher Overall Liveability Index than Darwin, while Western Victorians cited a higher quality of life than those from Far North Queensland.

While these liveability indices are interesting, and helpful over the longer-term to monitor whether and where quality of life is changing, they are not at all instructive.

Overall Liveability across Australia...

Metropolitan Australia:

- Greater Sydney = 65.9
- Greater Melbourne = 65.5
- South East Queensland = 63.7
- Greater Perth = 67.4
- Greater Adelaide = 67.4
- The Australian Capital Territory = 65.6
- Greater Hobart = 58.5
- Greater Darwin = 58.5

Regional and Rural Australia:

- Northern NSW = 58.8
- Central NSW = 60.5
- Southern NSW = 61.9
- Eastern Vic = 63.9
- Central Vic = 67.5
- Western Vic = 66.4
- Far North QLD = 60.3
- Central QLD = 59.5
- Regional WA = 61.7
- Regional SA = 67.7
- Regional Tas = 60.2
- Regional NT = 53.0

Understanding housing – what’s happening, and why it’s important

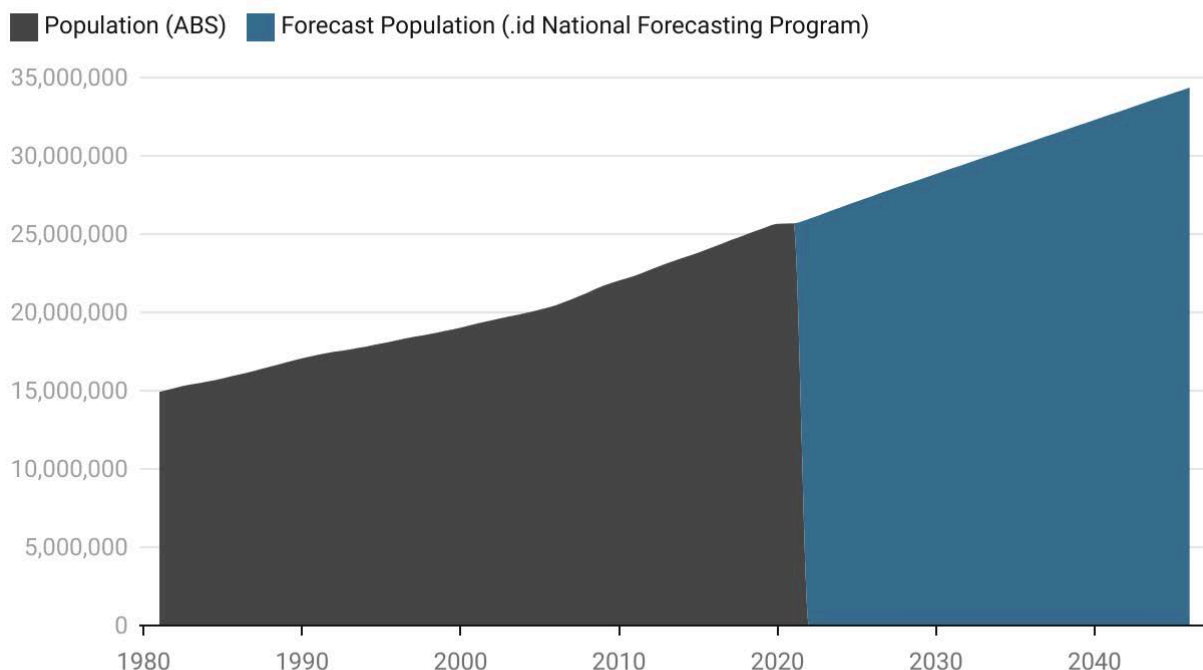
While no-one will debate that the provision of affordable decent housing is incredibly important to our national prosperity, here in Australia, how we address the issue of housing continues to be contentious. Socially, housing is an intergenerational enabler and disabler. It acts as a springboard for some and a barrier for others. Economically, it’s a controversial asset class.

There is no denying that housing in Australia is increasingly unaffordable. When Australia’s Baby Boomer generation initially entered the market in 1984, the average property price for capital cities was 3.3 times the average annual full-time earnings. Fast forward to today, and the average capital city house price is 11.4 times the average annual full-time earnings. Beyond ownership, the cost of private rental accommodation has increased substantially over recent years.

We know that there is high demand for housing in Australia. We’re among the fastest growing OECD countries and our forecasting team at .id predict that the population will grow by 330,000 people annually, reaching around 35 million by 2046.

So, with this absolute growth, and ever-shrinking household sizes, we quite simply need a lot more houses – which puts focus and pressure on the supply side of the housing equation.

Australia's population - historical and forecast

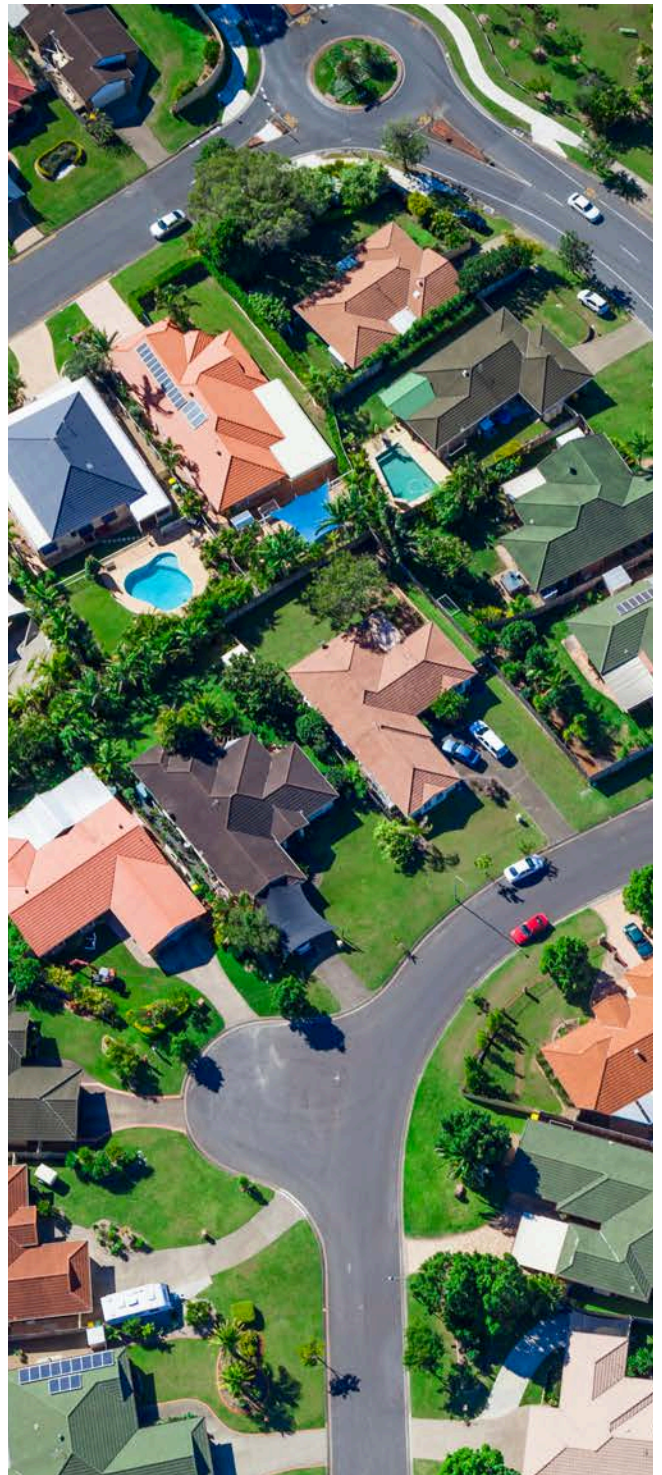


What value do we place on housing, and how do we experience it where we live?

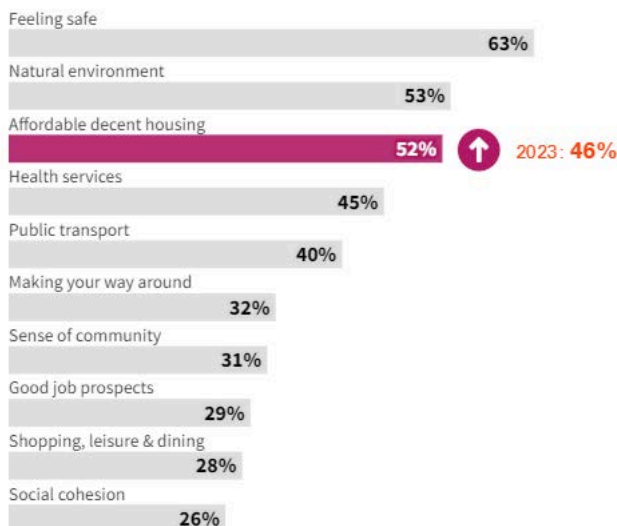
Our Living in Australia survey found that 'affordable decent housing' is the 3rd most important attribute of liveability across Australia – 52% list it in their top five attributes in making somewhere a good place to live. And it's increased in importance significantly from 46% in 2023.

When it comes to experiences – people’s ability to actually access ‘affordable decent housing’ where they live - it sits right at the very bottom as the 16th most positively experienced attribute, with an average rating of 4.7/10. This demonstrates a clear gap between values and experiences with regards to housing in Australian communities.

But we know that not all are affected by this issue in the same way. If we look at who affordable decent housing is most important to, we start to confirm what we would guess, and that is that accessing ‘affordable decent housing’ is considerably more important if you are younger and if you are renting. Two-thirds of 18 to 34 year-olds (66%) and just over two-thirds of renters (68%) put ‘affordable decent housing’ in their top 5 values.



Most important attributes in making somewhere a good place to live (Top 10)



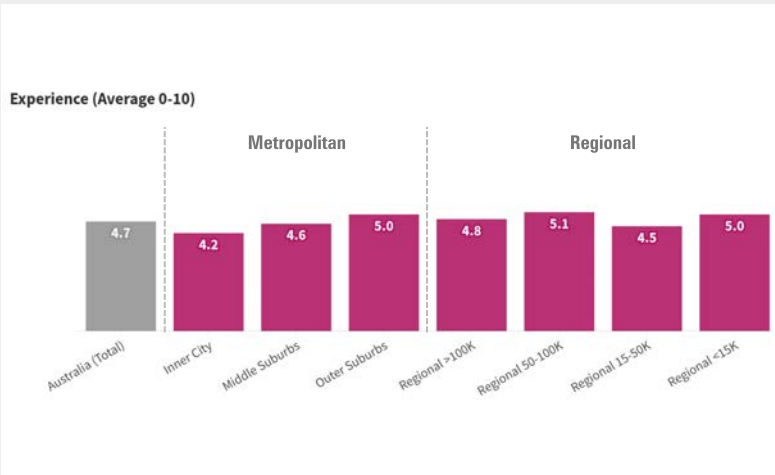
What value do we place on housing, and how do we experience it where we live?

Across the nation we also see different experiences of affordable decent housing depending on where you live.

In Metropolitan areas (capital cities), the ability to access 'affordable decent housing' improves the further you travel from the CBD.

In the Inner City, experiences of affordable decent housing are rated particularly low at 4.2 out of 10, improving to 5.0 out of 10 in the Outer Suburbs.

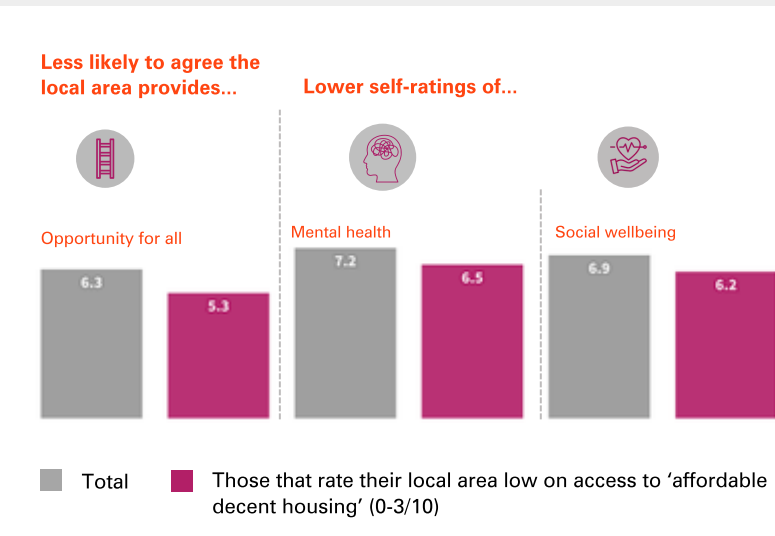
The Regional picture is a little more nuanced, with challenges in some of the coastal areas that boomed during the lockdown years – for example Bega Valley and Eurobodalla on the Southern NSW coast, and Ballina and Lismore on the Northern NSW coast.



Here we took a look at the attitudes and circumstances of those who perceive themselves to have poorer access to 'affordable decent housing', and how this compares to the balance of Australians.

Essentially, if you are experiencing poorer access to housing, you are also ...

- Less likely to feel that the local area you live in offers 'opportunity for all' – so you're questioning fairness and equity and potentially losing trust.
- Experiencing lower levels of mental health and social wellbeing, which impacts your ability to participate in society.



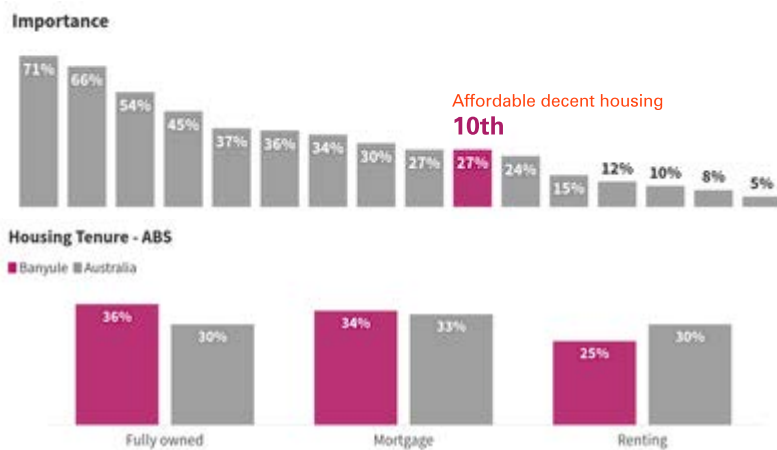
Why is it important at a local level?

From working with local governments across Australia we know that each local area has its own unique housing story. This Report illustrates this with two distinct examples...

So this starts to show how every place is different, and with good local data you can start to build an informed picture of a local area, and a solid basis for advocacy and strategic planning. Given its incredibly high importance, consistently poor local area experiences, the provision of 'affordable decent housing' truly represents the single biggest inhibitor to advancing quality of life across the Nation.

Banyule City Council

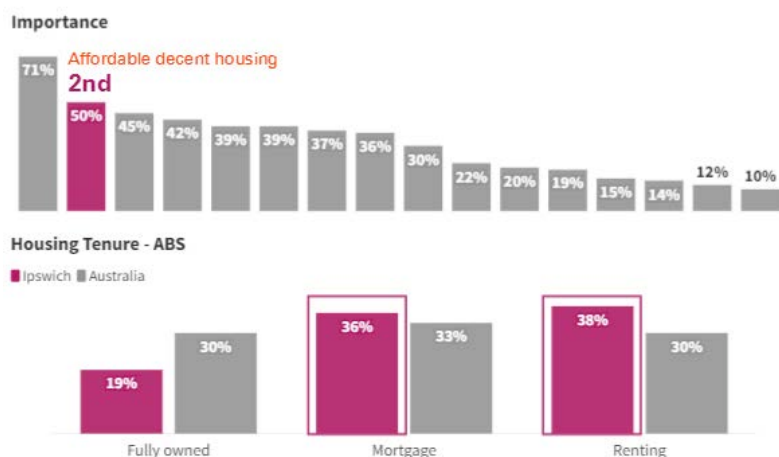
Banyule City Council, in Melbourne's north-eastern suburbs, subscribes to our Community Views service. Here, there is a high proportion of residents own their own home outright – 36% compared to the 30% national average. Across Banyule, 'affordable decent housing' was selected as the 10th most important liveability aspect, with only 27% of residents naming it in their top 5.



City of Ipswich

Contrast Banyule with the City of Ipswich in South East Queensland (who also subscribe to our Community Views service), where there is a relatively high proportion of renters, and households with a mortgage.

People are attracted to the area because of affordability and it's experiencing high population growth. Here, 'affordable decent housing' is the 2nd most important aspect of liveability, with half of residents finding it important to their quality of life.



Understanding community safety – what’s happening, and why it’s important

Another aspect which strongly affects our quality of life is how safe we feel, where we live.

If we recall Maslow’s hierarchy of needs, our security and safety needs form the foundation upon which our social and aspirational needs can be met. Safety and security is essentially a pre-requisite for achieving all other needs - building a life, making a contribution, and participating to our fullest extent.

We can’t ignore the fact that our right to ‘feel safe’ in Australia – and the extent to which we do feel safe – has been challenged in recent times.

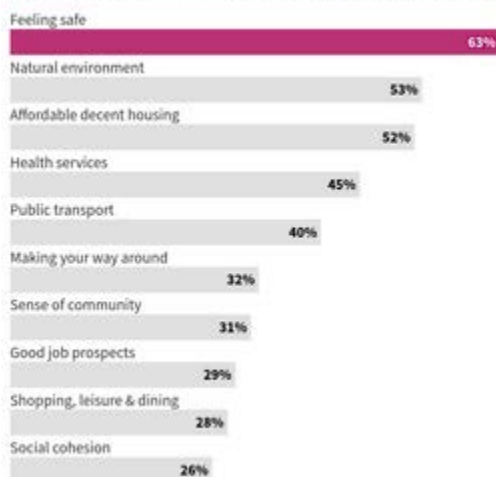
We’ve seen increases in gender-based violence, and with it increased attention from the public, the media and government. But how does this play out in the survey data?

Living in Australia finds that ‘feeling safe’ is the attribute people place the highest value on when thinking about what makes somewhere a good place to live, with 63% selecting it in their top five attributes. It is consistently a factor people expect from Australia’s neighbourhoods and towns, and something we have been fortunate to enjoy relatively well compared to other parts of the world. While our local area experiences with ‘feeling safe’ are above average when compared against the other 15 attributes administered in this part of the survey at 6.8/10, clearly there is still room for improvement.

What we find is that the need to feel safe in the local area holds higher importance for women than men, with 67% of women listing it as one of their most important attributes – significantly higher in comparison to 58% of men.

When we look at local area experiences, we find that people largely feel safe where they live and experiences of “feeling safe” are relatively equal across men and women. So, while ‘feeling safe’ is more valued by women, experiences are similar to men.

Most important attributes in making somewhere a good place to live (Top 10)



Feeling safe



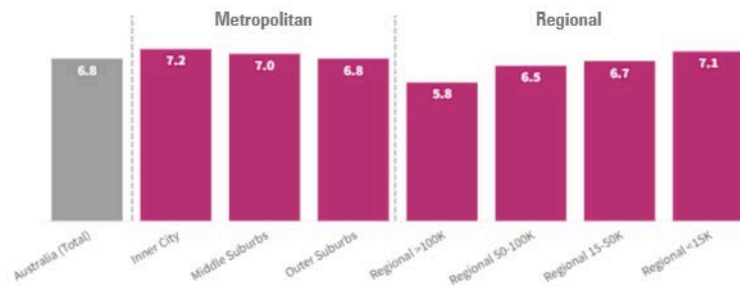
What value do we place on feeling safe, and how do we experience it where we live?

Geography plays a role in informing the relative value residents place on 'feeling safe', and how safe we feel in our local areas.

Exploring safety experiences spatially, residents in Inner City and smaller Regional areas feel most safe. However, in large regional areas and towns (defined as those with more than 100,000 residents including places like Bendigo, Ballarat, Geelong, Wollongong, Newcastle, Central Coast, Bundaberg, Mackay and so on) residents are significantly less likely to feel safe where they live.

Feeling safe

Experience (Average 0-10)



As a result, they are more likely to select 'law and order' as a top issue facing their local area in comparison to the average Australian. This shows how different experiences and concerns translate into different expectations from their local, State and Federal government representatives.

% that identify 'Crime/Law & Order' as a key local area issue

Regional >100K Australia



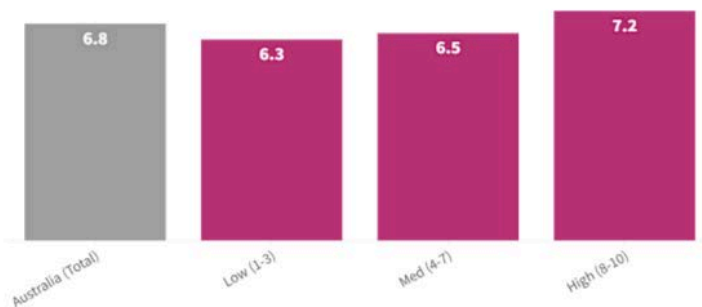
Residents' safety perceptions also differ according to small area socio-economic status.

This analysis shows how views on 'feeling safe' manifest spatially across lower, medium and higher socio-economic postcodes (using the ABS SEIFA Index of Disadvantage).

There's no shortage of dense academic research exploring this connection, but this is a starting point for considering the role of economic development, local employment and educational opportunities in contributing to safer and more prosperous communities.

Feeling safe

Experience (Average 0-10)

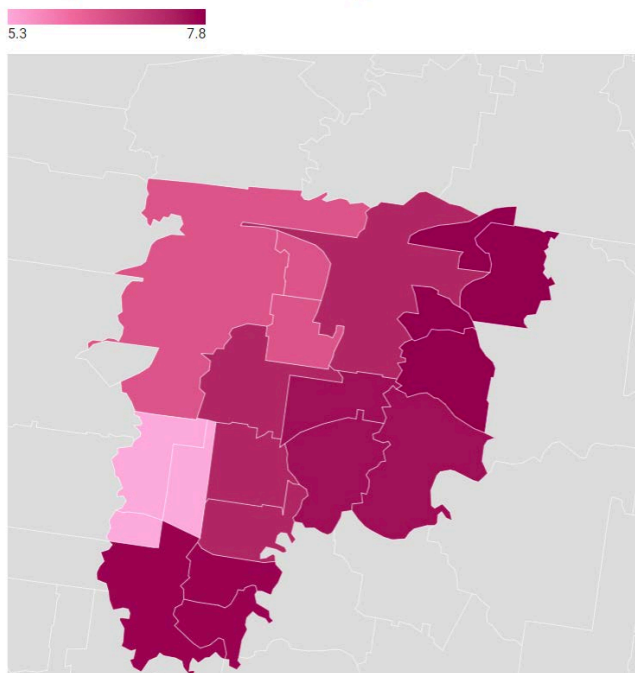


Why is it important to understand this at the local level?

We also help the Councils we work with to understand perceptions of safety at the neighbourhood level.

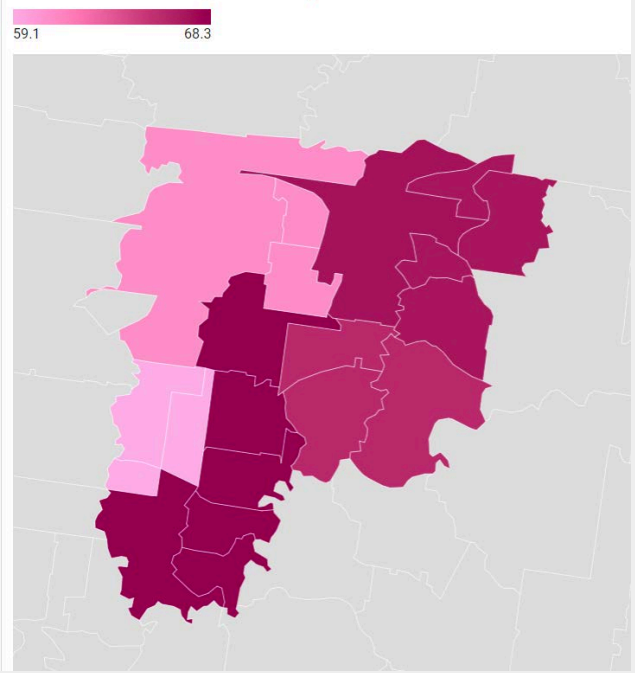
The Chart below shows how resident perceptions of feeling safe play out spatially. In the darker pink areas residents feel more safe; in the lighter, less safe.

Rate your local area for 'Feeling safe'



In this Chart you can see the Overall Liveability Indices for the equivalent suburbs – clearly showing the relationship between safety perceptions and overall quality of life.

Overall Liveability Index by Precinct



Looking at this data, spatially and at small area levels, allows us to explore the particular areas that might be the target for improvements in environmental design and/or community safety strategies.

Understanding the Economy – what’s happening, and why it’s important

It’s important to monitor how confident people feel about the economy and their own financial situation as it has implications for how they choose to spend, as well as impacting a range of other outcomes, including health and social wellbeing.

When asked to tell us the top issues facing their local area (they are allowed to select three), 59% selected ‘cost of living and inflation’; consistent with 2023 (57%) when it was also nominated as Australians’ most pressing local area concern.

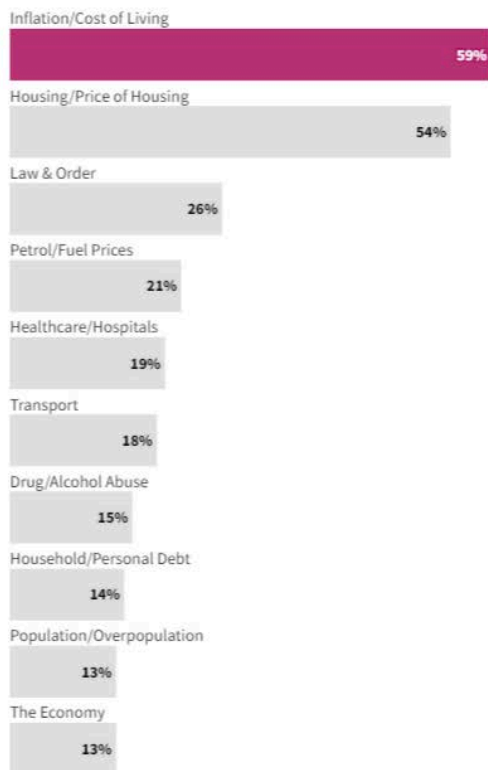
That’s at the overall level. But what happens when we explore this across various demographic groups?

Younger Australians - those aged between 18 & 34 years - also cite ‘cost of living’ as a top issue facing their local area, albeit with more acuity (68%) compared to older people.

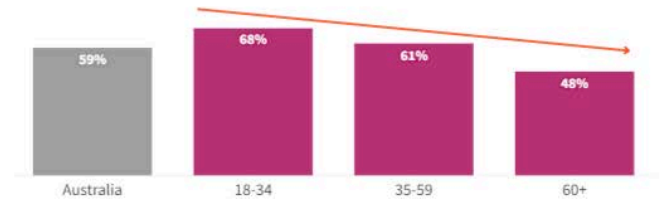
Current concerns about cost of living are related to residents’ assessment of their own financial wellbeing. Again, while personal circumstances generally improve as you age, younger people today are reporting significantly poorer financial circumstances in comparison to older generations.

This is a topic of national importance, because it is strongly associated with feelings of mental health. As outlined in the chart at the bottom, among those that rated their own financial circumstances as poor (0-3 out of 10), self-reported mental health was very low at 5.3/10, considerably below the national average (7.2).

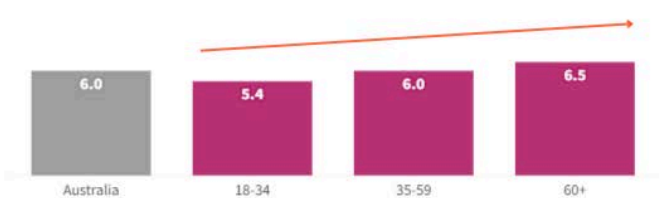
Top issues facing the local area (% selected in top 3)



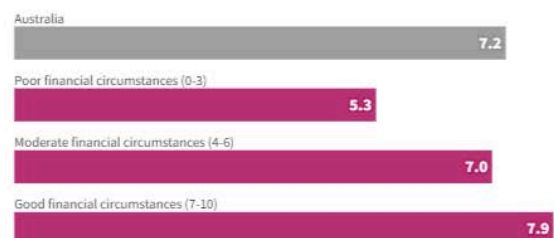
Identified 'Inflation/Cost of Living' as a key issue



Personal financial circumstances (0-10)



Mental health (Average 0-10)

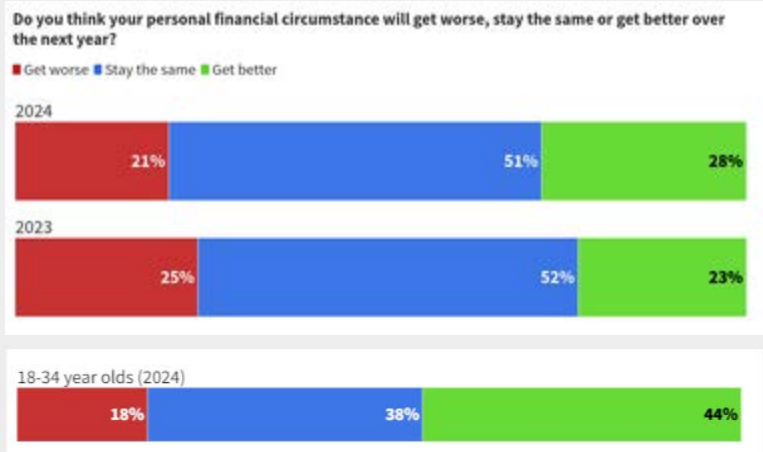


Understanding the Economy – what’s happening, and why it’s important

So, the Living in Australia data tells us that we see young people are struggling financially, and perhaps more so than previous generations. However, there is some good news.

Australians are more optimistic about their near-term personal financial circumstances in comparison to this time last year, and young people are in fact the most optimistic age cohort.

28% of Australians expect their financial circumstances to get better over the next year - up from 23% in 2023. For younger people, optimism was higher (44%).



When asked about the future economic prospects of our local areas, Australians were less pessimistic compared to this time last year, but certainly not optimistic.

The proportion of Australians who believe things are set to get worse has contracted from 39% in 2023 to 35%. While it is too early to tell whether dawn has broken on improved financial wellbeing, these signs are suggesting the community at large (at least) believes that the sunshine may be on the way.



Why is it important to understand this at the local level?

There are some signs that cost pressures might be starting to affect our priorities for our local area, where we are seeing a lower importance placed on shopping, leisure and dining experiences.

Across Australia, the proportion that rank shopping, leisure and dining experiences in their top 5 attributes in making somewhere a good place to live has dropped from 31% to 28% in 2024 - the same pattern is observed across most smaller area geographies, including both metropolitan and regional areas.

The chart below shows some examples from Sydney and Northern NSW. Empirical data from the banks certainly suggests that discretionary, non-essential spending has dropped, particularly among young people.

And we've also seen a significant increase in the importance of "good job prospects" in terms of what people look for in a local area, from 26% to 29%. So perhaps a bit of a switch in mindset from "how can I spend money" to "how can I make more money".

Understanding these trends at the local level are critical to bringing a credible resident lens to economic development policy and social policy.

Importance placed on shopping, leisure and dining (year-on-year)

■ 2023 ■ 2024



Understanding the Natural environment and climate change – what’s happening, and why it’s important

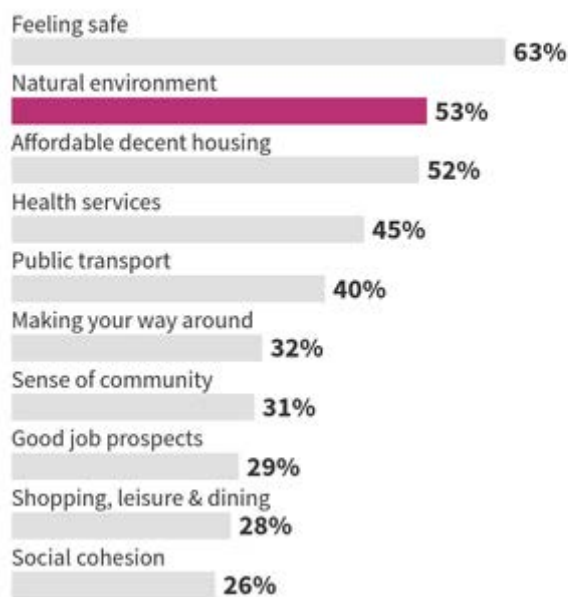
The 2023 Intergenerational Report dedicates one of its five chapters to the Nation’s climate challenge.

It warns of the impact that climate change will have on our way of life – the potential to disrupt where we live and work, agriculture and water use, interstate and overseas migration patterns, how we get around, food security, and our relationship with the natural environment.

Epidemiologists tell us that spending time in the natural environment on a regular basis makes a serious positive contribution to our wellbeing and, by extension our creativity, productivity and a host of other things that make for a good and resilient human. Australians understand this, as represented below where ‘access to the natural environment’ was selected as the 2nd most important item that contributes towards making somewhere a good place to live.

What does our high value on nature tell us about the community’s views on climate change, its impacts, and the required policy response?

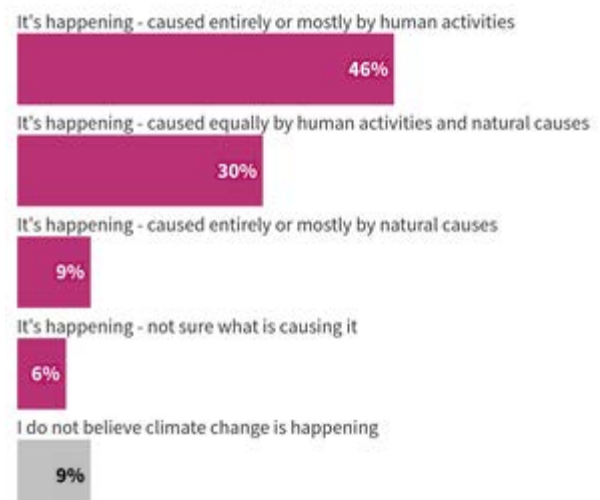
Most important attributes in making somewhere a good place to live (Top 10)



Belief in climate change has evolved over the past decade. While we don’t have an historic equivalent to our particular measure, research from the CSIRO from 2010-2014 suggests about 80% of Australians believed in climate change back then. In 2024, nine-in-ten Australians believe climate change is occurring.

However, as we have seen historically, there is some disagreement its cause. Living in Australia finds that just under half believe climate change is caused entirely or mostly by human activities (46%), and 30% feel it is caused equally by human activities and natural causes. Fewer (9%) believe it is due mostly to natural causes. Belief in climate change is more common in younger populations – 96% of 18 to 34 year-olds believe it is happening (and more younger people feel it is human-induced).

Attitudes to climate change

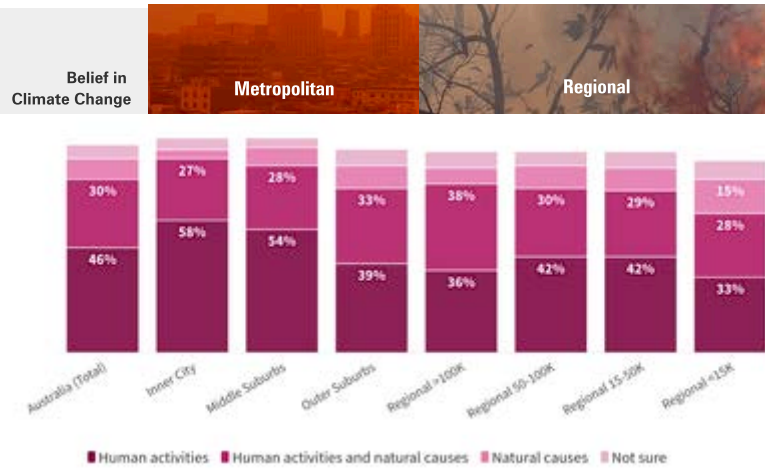


Understanding the Environment and Climate Change – what’s happening, and why it’s important

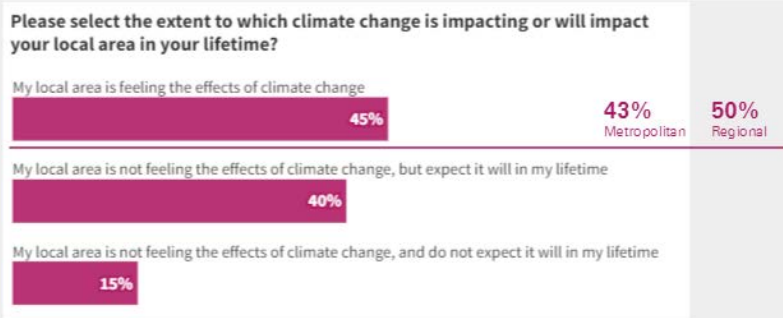
Place plays an incredibly important role in understanding the community’s views on climate change, the extent to which it is occurring and how confident we are about our local area’s ability to adapt.

In the Inner City, 94% of people believe in climate change and 58% believe it is due to human activity. In Regional communities, 84% believe in climate change, and a higher contingent feel it’s due to natural causes.

This statistic alone makes a compelling case as to why people responsible for climate policy and energy transition to understand these insights at local area levels – particularly across regional and rural areas – where place based energy transition projects will occur, economic compositions will change and infrastructure will be based.



Among those that believe in climate change, 45% said that their local area is already feeling the impacts of climate change, and a further 40% expect it to in their lifetime. People in Regional communities are more likely to say that their local area is already feeling the effects compared to those in Metropolitan areas.



Living in Australia also asked Australians to what extent they feel their local area will be able to adapt to the effects of climate change in their lifetime, and while 44% were confident it would; 52% were not confident. So there is some hesitation about the resilience of our local areas when it comes to adverse weather events, over the long term.



Understanding the Environment and Climate Change – what’s happening, and why it’s important

The climate-related event Australians are most expecting to be affected by is extreme heat. This isn’t all that surprising given that around 85% of Australians live in urban areas.

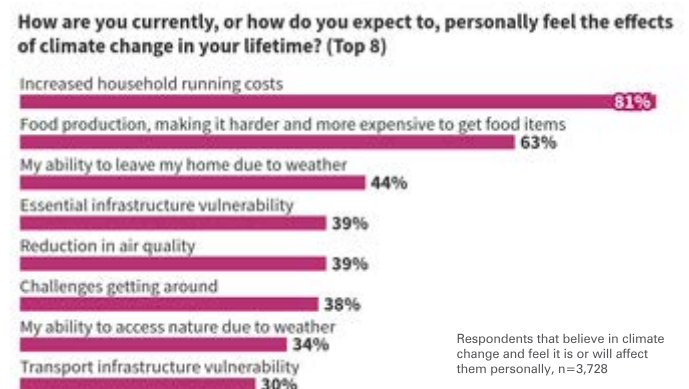
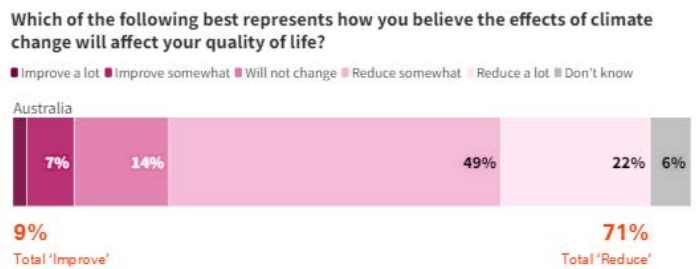
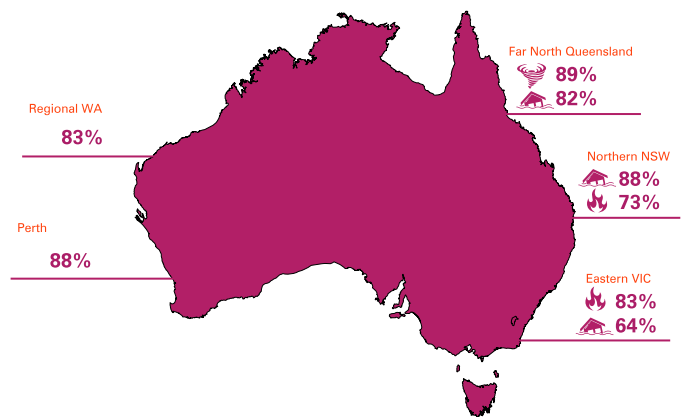
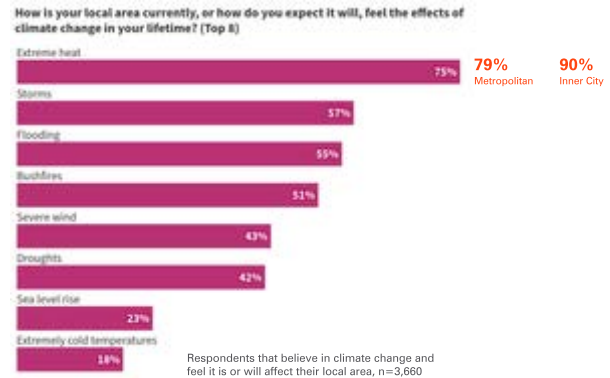
In metropolitan areas, 79% of those that expect their local area to be affected mentioned extreme heat. In the Inner City, this is as high as 90%.

Similar to housing needs, climate concerns are different across the country, with different Regions citing unique climate change related perspectives.

Across the western seaboard (Perth and Regional WA) extreme heat is the main concern with over eight in ten experiencing it, or expecting to experience it. In Eastern Victoria concerns are primarily for bushfires (as played out during the Black Summer fires of 2019–20). In Northern NSW, 88% said their local area is currently, or expecting to feel the effects of flooding (seen in the Northern Rivers area in an unprecedented way in recent times).

Among those who believe in climate change and think it is already, or will affect them personally in their lifetime, seven in ten say it will reduce their quality of life in some way.

When we ask about the way in which climate change will impact them personally, the main thing Australians told us was through increased household running costs (things like energy, water, insurance becoming more expensive), food production and the impact on our agricultural industries - ultimately meaning consumers pay higher prices for fruit, vegetables and dairy products (see cost of living discussed earlier).



Why is it important to understand this at the local level?

The diversity of Australia’s local areas means that climate change will impact communities in a variety of ways, raising different fears and challenges.

Across Greater Sydney, a dense urban environment, residents are most concerned about extreme heat and are more likely to be, or expecting to be, impacted by a reduction in air quality (45% compared to 39% of Australians).

Sydney

- High density urban environment
- ‘Urban heat island’ effect in some communities
- Areas with hard, sealed surfaces and a lack of vegetation and green infrastructure

75% extreme heat

45% reduction in air quality



In Northern NSW, with communities that are vulnerable to flooding, residents are more likely than average to be thinking about challenges getting around and challenges accessing essential services during major weather events.

Northern NSW

- Significant natural features including major rivers
- Considerable rainfall variability
- Communities that are vulnerable to flooding

88% flooding

52% challenges getting around

42% challenges accessing essential services



Local government – given their close connection to and deep understanding of their communities – are uniquely placed to help residents, industry and other levels of government to navigate the challenges posed by climate change and to build resilient communities. When residents can see their specific priorities and concerns reflected in policy, they will feel they are being listened to, be more likely to support and back their elective representatives and have greater agency in personally contributing to positive change.



Living in Australia 2024: National Community Views Survey - Key Insights Report

Please visit views.id.com.au/australia for additional insights, resources and data.

Learn more about the Community Views Service [HERE](#) or book a demonstration of our capabilities to support your local area decision making [HERE](#)