Perth Perception Survey 2018

Understanding residents’ perceptions of
LIVING AND WORKING IN PERTH
Interviews conducted

22 minutes survey

600 online interviews

184 measures

- Data weighted to be representative of Perth metro population
- Why they chose to live in Perth
- Views on what Perth is about
- What they would like to see changed in future

- Perceptions of infrastructure developments
- Entrepreneurial and business aspirations
- What they look for in their work
- Plans for retirement

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How has life in Perth changed?
Satisfaction with living in Perth has decreased to be more in line with 2012 sentiment after peaking in 2015.

<table>
<thead>
<tr>
<th>Year</th>
<th>Not at all satisfied</th>
<th>3-4</th>
<th>5</th>
<th>6-7</th>
<th>Extremely satisfied</th>
<th>Mean</th>
<th>Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>34</td>
<td>8</td>
<td>26</td>
<td>59</td>
<td></td>
<td>7.56</td>
<td>613</td>
</tr>
<tr>
<td>2015</td>
<td>23</td>
<td>21</td>
<td>73</td>
<td></td>
<td></td>
<td>8.12</td>
<td>316</td>
</tr>
<tr>
<td>2012</td>
<td>15</td>
<td>7</td>
<td>28</td>
<td>60</td>
<td></td>
<td>7.77</td>
<td>302</td>
</tr>
</tbody>
</table>

Source: Q4.

Significant differences to 2015: ▲ Higher ▼ Lower
This decline in satisfaction is seen across all age groups, but is strongest among the middle segment.
While a large majority continues to advocate living in Perth, this too has softened since 2015 and...

<table>
<thead>
<tr>
<th>Year</th>
<th>Extremely unlikely</th>
<th>Extremely likely</th>
<th>Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>5</td>
<td>29</td>
<td>302</td>
</tr>
<tr>
<td>2015</td>
<td>23</td>
<td>70</td>
<td>316</td>
</tr>
<tr>
<td>2018</td>
<td>25</td>
<td>46</td>
<td>603</td>
</tr>
</tbody>
</table>

*Note: Scale changed from 11pt to 5pt in 2018, wording adjusted, interpret comparison with caution, no sig testing due to changes

Source: Q5.
Perth residents are least likely to recommend Perth for its employment opportunities.

Source: Q5.
Indeed, flatter employment and economic prospects are being felt

- **41%** believe there are not enough jobs for their skills.
- **41%** believe there are less jobs available than elsewhere.
- **35%** are dissatisfied with their employment prospects in Perth.

The majority of residents do not see Perth as having a diverse and stable economy, instead positive perceptions are based on climate and lifestyle.

Residents’ Perceptions of What Characterises Perth Now 2018

- Mining / resources focused economy
- Entrepreneurial, innovative people
- Diverse economy
- Technologically advanced
- Stable economy
- Strong economy
- Affordability place to live
- Has a strong and effective government
- Has an attractive climate to live in
- A place of great natural beauty and scenery
- Relaxed and laid back lifestyle
- Outdoor-orientated, active lifestyle
- Friendly and welcoming
- Clean and pristine environment
- Willing to evolve and change with the times

In line with strong lifestyle ratings, residents see Perth as being best suited to families and relatively multicultural but struggling in terms of culture.
There is also evidence that the housing mix is not meeting needs and despite the infrastructure investment of the last 10 years, more is needed.

Residents’ Perceptions of What Characterises Perth Now 2018

- **Housing**
  - Good range of suitable housing choices
  - Is too spread out
  - Has the right mix of high and low density living

- **Infrastructure/Services**
  - Safe place to live
  - Is easy to get around
  - World class healthcare system
  - Has access to effective public transport
  - World class public facilities
  - Has acceptable commute times
  - World class education system
  - World class welfare system
  - World class aged care

Perceptions of WA’s economy being resources focussed have decreased across time but this has not been replaced by a sense that our economy is more diverse.

Perceptions of Perth over time

<table>
<thead>
<tr>
<th>ECONOMY/STABILITY</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
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<tbody>
<tr>
<td>Mining / resources focussed economy</td>
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<tr>
<td>Entrepreneurial, innovative people</td>
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<tr>
<td>Diverse economy</td>
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<tr>
<td>Affordable place to live</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>LIFESTYLE</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
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</thead>
<tbody>
<tr>
<td>Has an attractive climate to live in*</td>
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<tr>
<td>Relaxed and laid back lifestyle*</td>
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<tr>
<td>Outdoor-orientated, active lifestyle</td>
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<td>Friendly and welcoming</td>
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</tbody>
</table>

*Note: Statement wording changed, interpret comparison with caution, statement omitted if wording too different


Significant differences to 2015: ▲ Higher ▼ Lower
In fact, residents are now more likely to feel the resources sector is important to WA’s future prosperity compared to 2015.

Believe mining/resources focussed economy is an important driver of future prosperity:

- 41% in 2018
- 28% in 2015


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Despite few significant changes to PT services since 2015, residents are now twice as likely to feel they have access to effective PT.
Residents’ satisfaction with living in Perth is most impacted by two attributes; the extent to which it is good for families and good for young people. In line with overall satisfaction declining since 2015, positive ratings across these two attributes have also declined.
In terms of increasing satisfaction with Perth as a place to live, it’s still all about the family-friendly lifestyle. However, it’s critical to address current poor perceptions around affordability and the economy.
The below output is a mind map of how the attributes that drive satisfaction relate to one another. It reflects that as humans, we do not view attributes in isolation but rather as a series of grouped constructs.

Satisfaction

- Has an attractive climate to live in
- Good for families
- Good for young people
- Sophisticated, modern and cosmopolitan
- Relaxed and laid back lifestyle
- Good for older people
- World class education system
- Safe place to live
- Entrepreneurial, innovative people
- Is easy to get around
- Has access to effective public transport
- A place of great natural beauty and scenery
- Has a strong and effective government
- Diverse economy
- Has strong and engaged local communities
- Sufficient, high quality cultural & entertainment options
- Offers a good range of suitable housing choices
- Affordable place to live
- World class aged care
- World class healthcare system
- Stable economy
- Multicultural and diverse population
- Mining / resources focussed economy
- Outdoor-oriented, active lifestyle


Ipsos Bayes Net (IBN) Driver Analysis

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The size of the bubble indicates the impact of that attribute in driving satisfaction with living in Perth. The colour reflects current performance; green for areas of strength and red for weakness.
There are two direct drivers of satisfaction with living in Perth; being good for families and good for young people. Both of these are in turn impacted by perceptions around affordability and economic stability.
Life in Perth today is a tale of two cities; two in five feel things have improved and are enjoying Perth’s new urban experience, while one in three are feeling the pain of cost of living, social issues and insufficient infrastructure.

What changed for the better...
- URBAN DEVELOPMENTS: 47%
- INFRASTRUCTURE: 37%
- ENTERTAINMENT OFFER: 25%

...and for the worse...
- COST OF LIVING: 38%
- SOCIAL ISSUES: 34%
- INFRASTRUCTURE: 26%
Again, this polarised lived experience is heightened by generational differences with the middle segment showing the greatest shifts compared to 2015.

© 2018 Ipsos. Source: Q7. Base 2018 50+ (n=256), 30-49 (n=256), 16-29 (n=101), 2015 50+ (n=127), 30-49 (n=101), 16-29 (n=88)
Overall, recent infrastructure investments are seen to have had a positive impact by the majority of residents while population growth and higher density living are polarising.

<table>
<thead>
<tr>
<th>Impact of Infrastructure, Population and Density Changes</th>
<th>%</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freeway expansion</td>
<td>13</td>
<td>11</td>
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<tr>
<td>Rail investments and Metronet</td>
<td>2</td>
<td>18</td>
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<tr>
<td>Hospital developments</td>
<td>2</td>
<td>8</td>
</tr>
<tr>
<td>National Broadband Network (NBN)</td>
<td>11</td>
<td>14</td>
</tr>
<tr>
<td>Perth’s growing population</td>
<td>8</td>
<td>25</td>
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<tr>
<td>Increasing high-rise apartments</td>
<td>8</td>
<td>22</td>
</tr>
<tr>
<td>Increasing higher density living</td>
<td>8</td>
<td>22</td>
</tr>
<tr>
<td>Smaller blocks for houses</td>
<td>12</td>
<td>28</td>
</tr>
</tbody>
</table>

Source: Q12, 2018.
The recently completed and currently underway tourism, culture and entertainment initiatives are seen to be overwhelmingly positive for Perth despite some being met with contention when announced.

<table>
<thead>
<tr>
<th>Impact of Tourism, Culture and Entertainment Changes</th>
<th>Strong negative impact</th>
<th>Strong positive impact</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optus Stadium</td>
<td>14</td>
<td>42</td>
<td>39</td>
</tr>
<tr>
<td>Perth Arena</td>
<td>16</td>
<td>50</td>
<td>31</td>
</tr>
<tr>
<td>Growth of Fringe and Arts Festivals</td>
<td>24</td>
<td>49</td>
<td>23</td>
</tr>
<tr>
<td>Elizabeth Quay</td>
<td>19</td>
<td>45</td>
<td>27</td>
</tr>
<tr>
<td>New theatres</td>
<td>29</td>
<td>51</td>
<td>17</td>
</tr>
<tr>
<td>New hotels</td>
<td>28</td>
<td>51</td>
<td>18</td>
</tr>
<tr>
<td>Scarb. Beachfront Redevelopment</td>
<td>21</td>
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<td>22</td>
</tr>
<tr>
<td>Museum redevelopments</td>
<td>31</td>
<td>45</td>
<td>19</td>
</tr>
<tr>
<td>Small bars</td>
<td>28</td>
<td>50</td>
<td>16</td>
</tr>
<tr>
<td>Yagan Square</td>
<td>37</td>
<td>38</td>
<td>17</td>
</tr>
<tr>
<td>Recognition of Aboriginal Culture</td>
<td>34</td>
<td>39</td>
<td>15</td>
</tr>
</tbody>
</table>

Source: Q12, 2018.
There are signs of rebound...for some

While 40% believe their household is **financially worse off** compared to 5 years ago...

...37% believe the situation has **improved**.

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What makes a good place to live?

- Feeling safe: 74%
- Affordable decent housing: 56%
- High quality health services: 47%
- Access to the natural environment: 42%
- Reliable & efficient public transport: 36%

Perth rated HIGHER than other major cities:
- Access to the natural environment
- Making your way around with relative ease
- Reliable and efficient public transport
- Lack of road congestion
- Affordable decent housing

Perth rated LOWER than other major cities:
- Good job prospects
- A prosperous economy
- Feeling safe
- Diverse range of shopping, leisure & dining experiences
- Cultural facilities (e.g. museums, galleries, festivals)

Source: Ipsos Life in Australia, Nov ‘17

A separate national study confirms that job prospects and the economy are perceived weaker in WA by WA residents compared to the national average.
What residents would address as Premier for a Day aligns with the top three issues perceived to have worsened over time

- **Cost of Living**: E.g. Reduce cost, control utility costs, reduce taxes (20% in 2015)
- **Social Issues**: E.g. More police, harsher penalties crime/anti-social behaviour, address homelessness, address drug use (20% in 2015)
- **Infrastructure/Transport**: E.g. Improve infrastructure, better PT, more heavy rail, better cross-city/suburban links, reduce congestion (44% in 2015)
- **Economy**: E.g. More jobs needed, better employment opportunities, increase tourism, diversity economy (14% in 2015)
- **Government / Policy-making**: E.g. Stronger financial management, long-term not populist, reduce politicians' perks (5% in 2015)
- **Urban Policies**: E.g. Better culture and entertainment, easier to buy a house, better housing planning (13% in 2015)
- **Public Services**: E.g. Improve education, increase education funding, increase pension benefits (5% in 2015)
- **Environmental Policies**: E.g. Stronger policies, ban live exports, control sharks (13% in 2015)
- **Healthcare**: E.g. Improve system, more funding for hospitals, better mental health facilities (17% in 2015)


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In the words of Perth residents

- Reducing the **costs of living** expenses like electricity, gas, petrol and groceries as they are much more expensive than other states.

- I would somehow **adjust pricing for goods and utilities** to match the fact that Perth is no longer in a mining boom. I would also try and regulate housing prices and international buyers into the housing market.

- Tougher stance on criminal and drug activity, and better policing of anti-social behaviour and drug use.

- Infrastructure – Perth has not planned for the future. We need to reduce road congestion by opening up new transport links.

Trend data from an external study supports that Perth residents are feeling the pain of a negative trifecta; high concern around the economy and unemployment without easing cost of living worries.

- Unemployment
- Drug Abuse
- Crime
- The Economy
- Healthcare
- Cost of living
How are attitudes towards work changing?
As we saw earlier, many Perth residents are feeling negatively about employment prospects in Perth, however…

- 41% Believe there are not enough jobs for their skills
- 41% Believe there are less jobs available in Perth than elsewhere
- 35% Are dissatisfied with their employment prospects in Perth

…self-employment is seen as a risky alternative

26% Would prefer working for themselves as opposed to being employed

40% Believe it is difficult to start a business in Perth

39% See lack of sufficient incentives and protections for starting a business

35% & 46% among those currently self-employed

Risk may be amplified by the perceived cyclical nature of the WA (mining) economy – boom and bust narrative is hard to shake.

Despite the many sectors outside of mining contributing to employment, the trickle down affect of mining is significant.

Employment by industry (Census 2016)

- Health Care and Social Assistance: 11.7%
- Construction: 9.8%
- Retail Trade: 9.5%
- Education & Training: 8.7%
- Accommodation & Food Services: 6.4%
- Professional, Scientific & Technical Services: 6.4%
- Mining: 6.3%

Source: Australian Bureau of Statistics
Amongst 16-34yr old men…

- 68% would take risks to enhance their economic standing (vs. 50% overall)
- 59% believe owning a business is financially more rewarding than being employed (vs. 38% overall)

Despite Perth residents intending to retire close to the current retirement age, there is a desire for prolonged working lives and more flexibility in transitioning out of full time work.

- **64.2** average (planned) retirement age
- **78%** Don’t intend to retire completely but to...
  - Reduce hours or work on a casual / hourly basis **44%**
  - Volunteer (part or full-time) **36%**
  - Work from home more **19%**
  - Mentor people in their profession **14%**
  - Work in another field / profession on a casual / hourly basis **11%**

There is also a desire for more flexibility now, irrespective of gender.

- **69%** would like to work more flexible hours if employers allowed it.
  - Males: 64%
  - Females: 73%

- **62%** would like to work less than full-time if it didn’t impact their career.
  - Males: 55%
  - Females: 69%

- **35%** believe working part-time is frowned upon by employers.

Opportunities are not perceived equal

- Believe there are no barriers to upward mobility in Perth:
  - 51% (Males) vs. 36% (Females)

- Think everyone has equal access to opportunities:
  - 35% (Males) vs. 23% (Females)

Source: Q11.
Base 2018 Females n=327
Males n=286.
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Besides flexibility at work, childcare can be a barrier – cost more so than access.

Disagree: 46%
Agree: 23%

Disagree: 25%
Agree: 42%

Childcare costs are low enough to justify me working
I have access to all the paid childcare I need

© 2018 Ipsos.
The middle aged feel the pressure most strongly

Higher levels of **disagreement** amongst middle aged that Perth offers…

<table>
<thead>
<tr>
<th>Economic Condition</th>
<th>16-34yrs (n=165)</th>
<th>35-54yrs (n=225)</th>
<th>55+yrs (n=223)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong economy</td>
<td>10%</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>Stable economy</td>
<td>8%</td>
<td>22%</td>
<td>11%</td>
</tr>
<tr>
<td>Equal access to opportunities</td>
<td>10%</td>
<td>17%</td>
<td>9%</td>
</tr>
<tr>
<td>No barriers to upward mobility</td>
<td>17%</td>
<td>32%</td>
<td>26%</td>
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</tbody>
</table>

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What do Perth residents want from the future?
The majority of residents want to stay long-term (80%).

- **Overseas / Interstate migrants**: 83%
- **Work / business opportunities**: 23%
- **Poor state of WA economy**: 12%

Consider leaving for a while but intend to return (30%).

Intend to leave long-term (16%).

While population growth, migration and density are seen to be critical for the success of future Perth, support for change is divided along generational lines.

- **Population growth will make Perth a better place**
  - 16-34yrs: 31%
  - 35-54yrs: 45%
  - 55+yrs: 45%

- **Migration to Perth should be encouraged**
  - 16-34yrs: 39%
  - 35-54yrs: 45%
  - 55+yrs: 55%

- **I think there should be more higher-density living**
  - 16-34yrs: 47%
  - 35-54yrs: 46%
  - 55+yrs: 37%

Source: Q11, 2018.
And the desire of Perth residents to remain at home as they age is in conflict with increased density

- 65% Want to remain in their home
  - 55+ yrs: 71%
- 29% Downsize to a smaller home or apartment
- 5% Move to a retirement village
- 2% Move in with family

In terms of Perth’s future prosperity, residents see a strong economy and affordable living as critical along with maintaining its natural environment and lifestyle.

Residents’ Future Expectations of Perth 2018

<table>
<thead>
<tr>
<th>Category</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
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<tbody>
<tr>
<td><strong>ECONOMY/STABILITY</strong></td>
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<tr>
<td>Strong economy</td>
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<td>Having a strong and effective government</td>
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<td>Being an affordable place to live</td>
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<td>Stable economy</td>
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<td>Diverse economy</td>
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<td>Being technologically advanced</td>
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<td>Entrepreneurial, innovative people</td>
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<td><strong>LIFESTYLE</strong></td>
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<tr>
<td>Having a clean and pristine environment</td>
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<tr>
<td>Friendly and welcoming</td>
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<td>Willing to evolve and change with the times</td>
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<tr>
<td>Being a place of great natural beauty and scenery</td>
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Increasing density is considered less important than safety and ease of moving around for the future.

Residents’ Future Expectations of Perth 2018

<table>
<thead>
<tr>
<th>Housing</th>
<th>Offers a good range of suitable housing choices</th>
<th>Having the right mix of high and low density living</th>
<th>Addressing the geographic spread of Perth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure/Services</td>
<td>Being a safe place to live</td>
<td>Having access to effective public transport</td>
<td>Is easy to get around</td>
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<tr>
<td></td>
<td>Having a world class healthcare system</td>
<td>Having a world class education system</td>
<td>Having acceptable commute times</td>
</tr>
<tr>
<td></td>
<td>Having world class public facilities</td>
<td>Having world class aged care</td>
<td>Sufficient, high quality cultural &amp; entertainment</td>
</tr>
<tr>
<td></td>
<td>Having a world class welfare system</td>
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</tbody>
</table>


2018
Residents also want Perth to remain suited to raising a family and to move beyond any perception of being old-fashioned.

<table>
<thead>
<tr>
<th>SOCIETY/PEOPLE</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good for families</td>
<td></td>
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<tr>
<td>Everyone having equal access to opportunities</td>
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<tr>
<td>Good for young people</td>
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<tr>
<td>Good for older people</td>
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<tr>
<td>Accepting of people from different cultures</td>
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<td></td>
</tr>
<tr>
<td>Having strong and engaged local communities</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multicultural and diverse population</td>
<td></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Respects Indigenous culture</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Sophisticated, modern and cosmopolitan</td>
<td></td>
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</tr>
<tr>
<td>Artistic and creative</td>
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<tr>
<td>Traditional and old fashioned</td>
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</tr>
</tbody>
</table>

Top 3 Box (8-10)

Compared to 2015, more Perth residents feel a resources focussed economy is important to our future while lifestyle elements are considered less important than they were in 2015.

Residents’ Future Expectations of Perth Over Time

- **ECONOMY/STABILITY**
  - Being an affordable place to live*
  - Diverse economy
  - Entrepreneurial, innovative people
  - Mining / resources focussed economy

- **LIFESTYLE**
  - Friendly and welcoming
  - Being a place of great natural beauty and scenery*
  - Having an attractive climate to live in*
  - Relaxed and laid back lifestyle*
  - Outdoor-oriented, active lifestyle

*Note: Statement wording changed, interpret comparison with caution, statement omitted if wording too different. Some statements not asked in 2015.

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Source: Q10.
Residents’ Future Expectations of Perth Over Time

**EXPECTATIONS**

<table>
<thead>
<tr>
<th>Category</th>
<th>2012</th>
<th>2015</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INFRA/STR./SERV.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Having access to effective public transport*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Being a safe place to live*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offers a good range of suitable housing choices*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good for families*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Willing to evolve and change with the times</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SOCIETY/PEOPLE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good for young people*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accepting of people from different cultures*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good for older people*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multicultural and diverse population</td>
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<td></td>
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<tr>
<td>Sophisticated, modern and cosmopolitan</td>
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<tr>
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<td>Traditional and old fashioned</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note: Statement wording changed, interpret comparison with caution, statement omitted if wording too different. Some statements not asked in 2015.

Source: Q10.

Expectations have not increased across any other attribute compared to 2015 but they have softened across many.

Significant differences to 2015: ▲ Higher ▼ Lower

GAME CHANGERS
There are stark differences between those attributes seen to define Perth now and those seen as most important to Perth’s future.

<table>
<thead>
<tr>
<th>Strongest Current Perceptions of Perth</th>
<th>Most Important to Perth’s Future</th>
<th>Top 3 Box (8-10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Has an attractive climate to live in</td>
<td>#1 Being a safe place to live</td>
<td>80%</td>
</tr>
<tr>
<td>#2 A place of great natural beauty and scenery</td>
<td>#2 Having access to effective public transport</td>
<td>79%</td>
</tr>
<tr>
<td>#3 Relaxed and laid back lifestyle</td>
<td>#3 Strong economy</td>
<td>78%</td>
</tr>
<tr>
<td>#4 Outdoor-oriented, active lifestyle</td>
<td>#4 Having a clean and pristine environment</td>
<td>77%</td>
</tr>
<tr>
<td>#5 Good for families</td>
<td>#5 Having a strong and effective government</td>
<td>77%</td>
</tr>
<tr>
<td>#6 Mining / resources focussed economy</td>
<td>#6 Is easy to get around</td>
<td>75%</td>
</tr>
<tr>
<td>#7 Multicultural and diverse population</td>
<td>#7 Being an affordable place to live</td>
<td>75%</td>
</tr>
<tr>
<td>#8 Friendly and welcoming</td>
<td>#8 Good for families</td>
<td>75%</td>
</tr>
<tr>
<td>#9 Clean and pristine environment</td>
<td>#9 Having a world class healthcare system</td>
<td>75%</td>
</tr>
<tr>
<td>#10 Accepting of people from different cultures</td>
<td>#10 Stable economy</td>
<td>74%</td>
</tr>
</tbody>
</table>

Source: Q9, Q10. Base 2018 n=613.
A gap analysis of these two lists reveals four priority areas for the future of Perth and they firmly centre on the economy and cost of living.

Source: Q9, Q10. Base 2018 n=613.
This is supported by an external study that reveals Perth residents are more likely than those from other Australian metro areas to be feeling pressure around economic instability.

<table>
<thead>
<tr>
<th>Issues facing</th>
<th>Per Cent</th>
<th>Other Australian metros</th>
<th>Significantly higher</th>
<th>Significantly lower</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unemployment</td>
<td>34%</td>
<td>19%</td>
<td>▲</td>
<td>▼</td>
</tr>
<tr>
<td>Crime</td>
<td>33%</td>
<td>27%</td>
<td>▲</td>
<td>▼</td>
</tr>
<tr>
<td>The Economy</td>
<td>32%</td>
<td>11%</td>
<td>▲</td>
<td>▼</td>
</tr>
<tr>
<td>Cost of Living</td>
<td>31%</td>
<td>31%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drug Abuse</td>
<td>30%</td>
<td>16%</td>
<td>▲</td>
<td>▼</td>
</tr>
<tr>
<td>Healthcare</td>
<td>29%</td>
<td>29%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing</td>
<td>18%</td>
<td>37%</td>
<td>▼</td>
<td>▲</td>
</tr>
<tr>
<td>Transport</td>
<td>12%</td>
<td>26%</td>
<td>▼</td>
<td>▲</td>
</tr>
<tr>
<td>Population</td>
<td>4%</td>
<td>17%</td>
<td>▼</td>
<td>▲</td>
</tr>
</tbody>
</table>

Significant differences: ▲ Higher ▼ Lower

Source: Ipsos Issues Monitor

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What is the impact of migration?
Attitudes are similar

Characterise Perth as…

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Top 3 Box (8-10)</th>
<th>Top 2 Box (4-5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining / resources focussed economy</td>
<td>60%</td>
<td>81%</td>
</tr>
<tr>
<td>Multicultural and diverse population</td>
<td>56%</td>
<td>85%</td>
</tr>
<tr>
<td>Good families</td>
<td>61%</td>
<td>85%</td>
</tr>
<tr>
<td>Entrepreneurial, innovative people</td>
<td>85%</td>
<td>78%</td>
</tr>
<tr>
<td>Strong economy</td>
<td>81%</td>
<td>78%</td>
</tr>
<tr>
<td>Affordable place to live</td>
<td>85%</td>
<td>83%</td>
</tr>
<tr>
<td>Has a strong and effective government</td>
<td>78%</td>
<td>85%</td>
</tr>
</tbody>
</table>

Satisfaction with living in Perth

- Perth born and bred: 60%
- Perth born, left and returned: 56%
- Overseas / Interstate migrants: 61%

Likelihood to recommend Perth as a place to live

- Perth born and bred: 81%
- Perth born, left and returned: 85%
- Overseas / Interstate migrants: 85%

Want to stay long-term

- Perth born and bred: 78%
- Perth born, left and returned: 78%
- Overseas / Interstate migrants: 83%

Source: Q2, Q4, Q5, Q9, 2018.

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### Top 5 Reasons for Living in Perth

<table>
<thead>
<tr>
<th></th>
<th>Perth born &amp; bred</th>
<th>Perth born, left &amp; returned</th>
<th>Overseas / interstate migrants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family</td>
<td>58%</td>
<td>70%</td>
<td>47%</td>
</tr>
<tr>
<td>Lifestyle</td>
<td>41%</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>Friends</td>
<td>32%</td>
<td>35%</td>
<td>43%</td>
</tr>
<tr>
<td>Great for families</td>
<td>27%</td>
<td>32%</td>
<td>30%</td>
</tr>
<tr>
<td>Climate</td>
<td>26%</td>
<td>Safe (25%)</td>
<td>Great for families (28%)</td>
</tr>
</tbody>
</table>

Differences in attitudes shape the conversation

36% of those surveyed placed higher importance on:

- Public transport / getting around
- Education and Healthcare system
- Diverse economy / being technologically advanced
- Adaptability

Less satisfied with:

- Childcare offer
- Business opportunities

Source: Q9, Q10, Q11. Base 2018 n=240.
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What does this mean for Perth’s future?
Change perceptions of a mining driven town

1. As a city, there is an opportunity to proactively unshackle the perception of being a mining-driven town with a boom and bust cycle; **there’s more to Perth’s economy**.

2. Residents **want to work flexibly** and there is a certain **willingness to take risks** to enhance economic standing **BUT** recent experiences post boom times have created a level of **uncertainty** and residents are **hesitant**.
As a result of the GFC, industries have been suffering and there seems to be a sequencing – starting with the downturn in the mining and construction sectors which had implications on sectors like retail, professional services etc.

Yet, there are early signs of recovery across many industries including a swell of positivity around mining.

While there are signs of improvement, other industries are still suffering and this is reflected in the polarised views of residents at the household level.

Hence, there is an opportunity to shift the narrative to talk up what is going well instead of focusing on the negatives.
• The population growth of recent years is projected to continue.
• By 2046, Perth’s population is forecast to reach 4.4 million (Infrastructure Australia).
• This poses challenges to Perth’s infrastructure (traffic congestion, housing, higher density-living, aged/healthcare etc.), which is already causing concerns amongst residents.
• There is an opportunity to address the growing pains around infrastructure / urban growth and manage residents’ expectations (if growth continues, higher-density living will be a must and compared to other major cities across Australia, the current negative impact being felt by Perth residents seems actually to be lower).
Despite a general openness to taking work or business related risks among some, the prospect of starting business in Perth is largely not seen as worthwhile.

This is due to a mix of economic instability and lack of risk based incentives / support.

There is an opportunity to cut the red tape to ease administrative burden, creative value based incentives, and focus on the flexibility that self-employment offers (this is aligned with residents’ desire to work flexible hours and part-time).
Capture the growth opportunities post-retirement

5
• With an **ageing population**, working lives will need to extend beyond 65; **longer-term engagement** in the workforce is needed.
• The ratio of retirees to workers is changing:
  • 1970 – 1 : 7.5
  • 2010 – 1 : 5
  • 2050 – 1 : 2.7 (projected)
• Residents **are willing** to work beyond retirement but will require **more flexible** working arrangements, volunteer / mentoring opportunities to facilitate this.
• The challenge for Perth is around how to **mobilise** the growth opportunities.

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GAME CHANGERS
Differences in attitudes and perceptions are most prevalent not between groups of different origin, but rather along generational lines.

Different views about the future of Perth and around growth, migration and density can pose challenges if not acknowledged.
Create equal opportunities

7. Create more opportunities for the **older generation** AND more opportunities for **women** who are currently:
   - more likely to see a **barrier to upward mobility** and
   - more likely to see **higher levels of inequality** in terms of opportunities.