

Ipsos Public Affairs

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Community survey for the Committee for Sydney

Life in Sydney 2020

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GAME CHANGERS



Background

Ipsos Public Affairs and the Committee for Sydney started the 'Life in Sydney' study in 2020.

It provides a snapshot of the Greater Sydney community sentiment on a range of issues, more specifically:

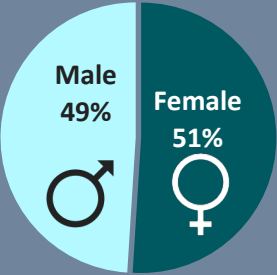
- Quality of life
- Travel and transport
- Impact of COVID-19
- Climate change and global warming

The survey aims to be conducted every year to track sentiment overtime. The information gathered helps to inform the Committee for Sydney's research and advocacy work and is a useful resource for decision makers in government.



Demographic distribution of the 'Life in Sydney' sample

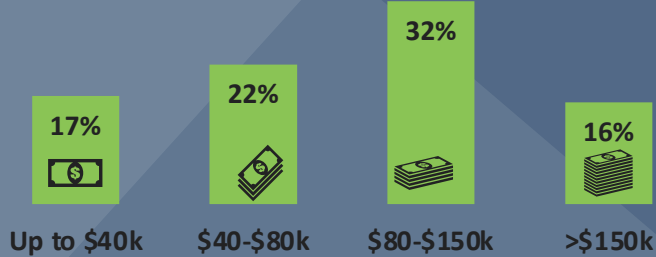
Gender



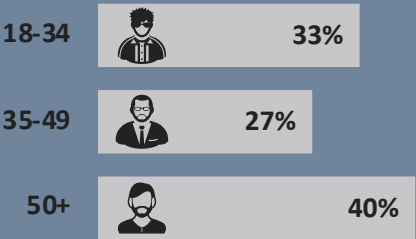
Location



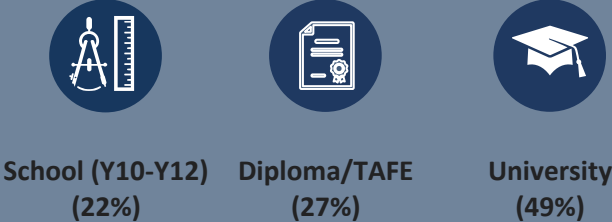
Household income



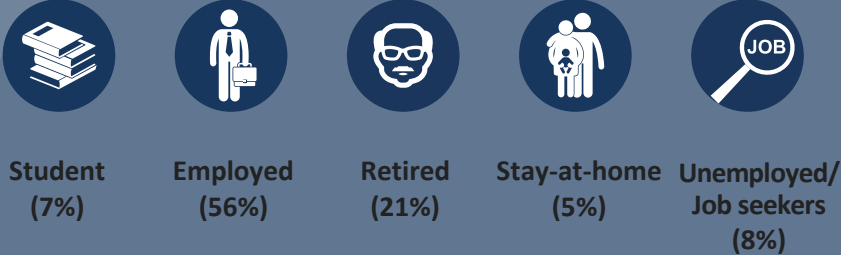
Age



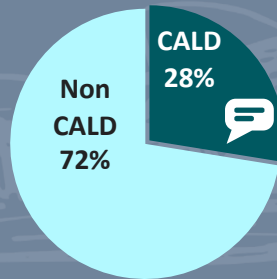
Education



Occupation



CALD



Time in Sydney



SQ1. What best describes your gender?
SQ2. In which of the following age groups do you fall under?
SQ3. And what is the postcode of where you live?

SQ4. How long have you been living in Sydney?
SQ5. Which of the following best describes you?
Q25. Do you or your parents mainly speak a language other than English?

Q28. What is your approximate annual household income before tax?
Q29. What is the highest level of education that you have completed?
Base: All respondents (n=1005)

COMMUNITY SENTIMENT

QUALITY OF LIFE



QUALITY OF LIFE

We asked people to tell us what they like and dislike about living in Sydney.

Overall, those surveyed were positive about living in Sydney. Majority (85%) are very satisfied or fairly satisfied with their quality of life. Those tend to be retirees and older people.

People are also optimistic with a larger proportion (37%) believing that their quality of life will improve over the next 12 months.

Most popular aspects of living in Sydney include access to great facilities, a diverse range of activities and a beautiful natural environment.

A high cost of living and unaffordable housing are the biggest concerns and key drivers of dissatisfaction.

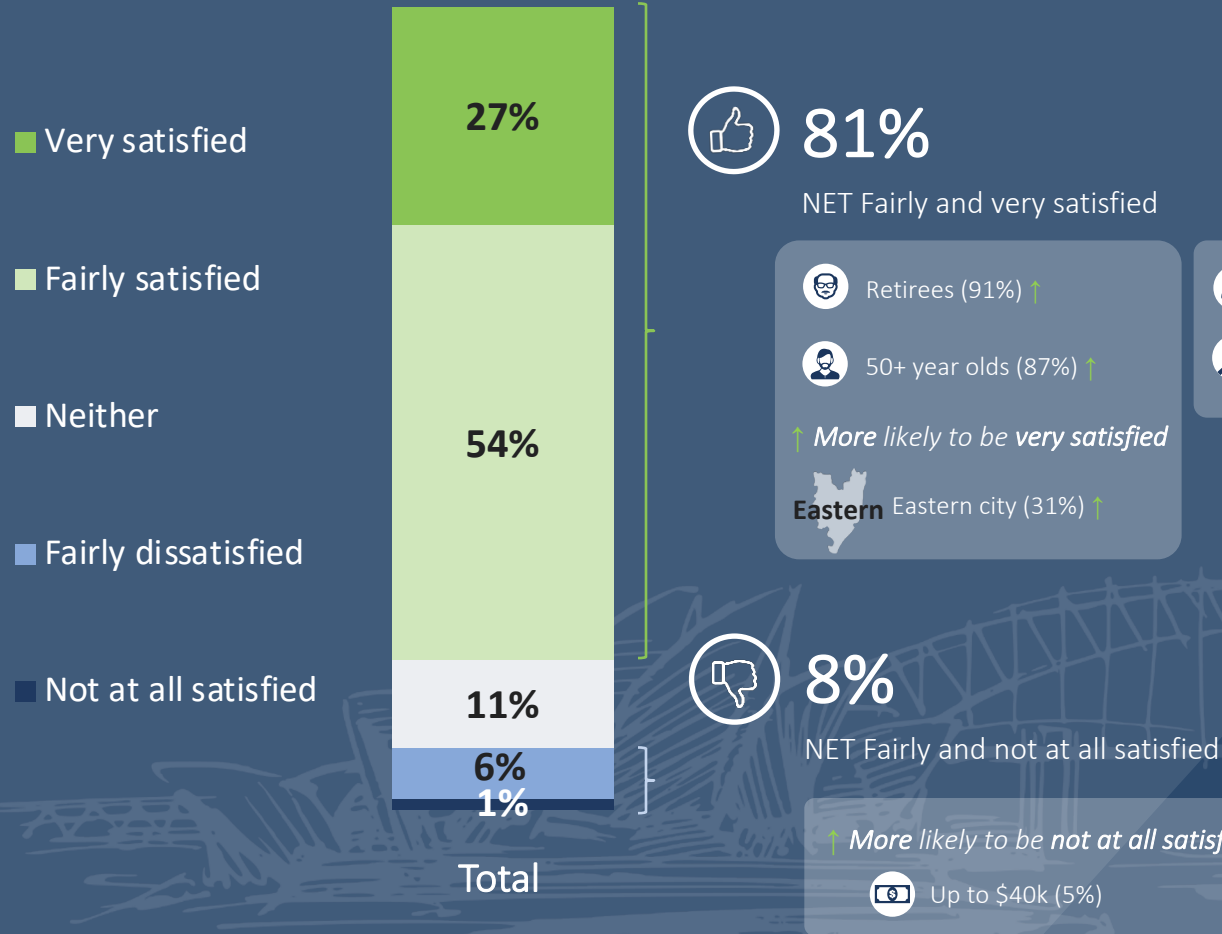
Around one in five (21%) of Sydneysiders are likely to move in the next few years. Those tend to be younger or to be working full time and are mainly driven by the high cost of living.



Quality of life

Four in five (81%) Sydneysiders are satisfied with their quality of life

- Retirees and people aged 50 and over are more likely to be satisfied
- Facilities and services, the activities available and the beautiful scenery are key drivers of satisfaction



Why are you satisfied?

- 1 Facilities/services** (e.g. transport, shops, healthcare, education)
15% indicated this is the reason why they are satisfied
- 2 Vibrant/plenty to see and do**
14%
- 3 Beautiful/nice scenery**
13%

Dissatisfied

- 1 It's too expensive**
37% indicated this is the reason why they are dissatisfied
- 2 Overcrowded/too busy**
34%

Q1. Thinking about your life in Sydney overall, how satisfied are you with your quality of life in Sydney?

Base: All respondents (n=997)

Note: 'Don't know' responses excluded from the chart for analysis purposes. NET results do not always add up to proportions shown in the chart due to rounding

Q2. How satisfied are you with your quality of life in Sydney: Why do you say that?

Base: Satisfied respondents (n=814), Dissatisfied respondents (n=76)



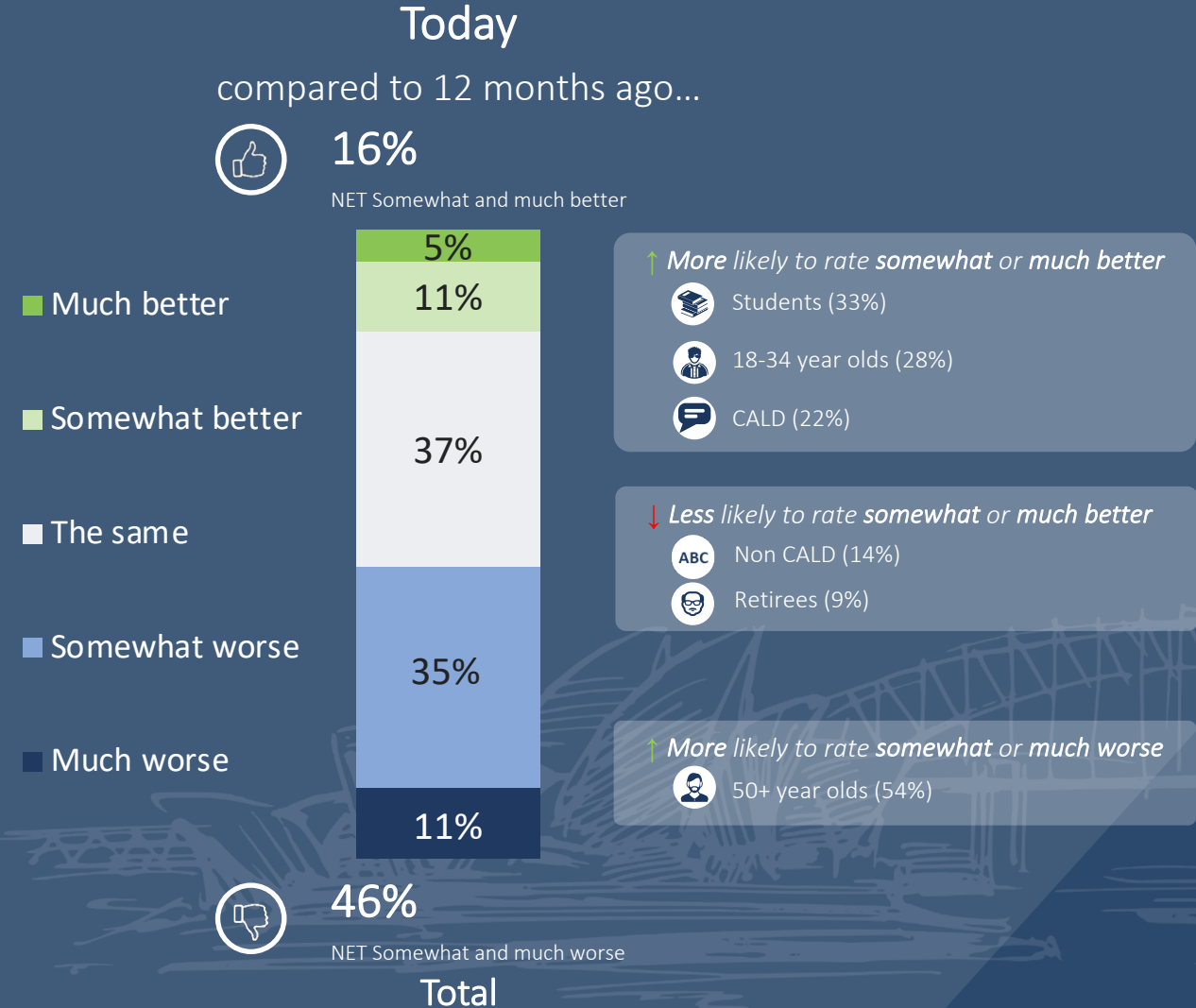


Great city, opera house, botanical gardens, plenty of walks to do, beaches are great, some are managed with life savers, lovely bush walks, blue mountains. Lots of shopping complexes to choose from. Great clubs. Good restaurants, there is a lot you can do without costing you any money at all. Bike ride pathways.

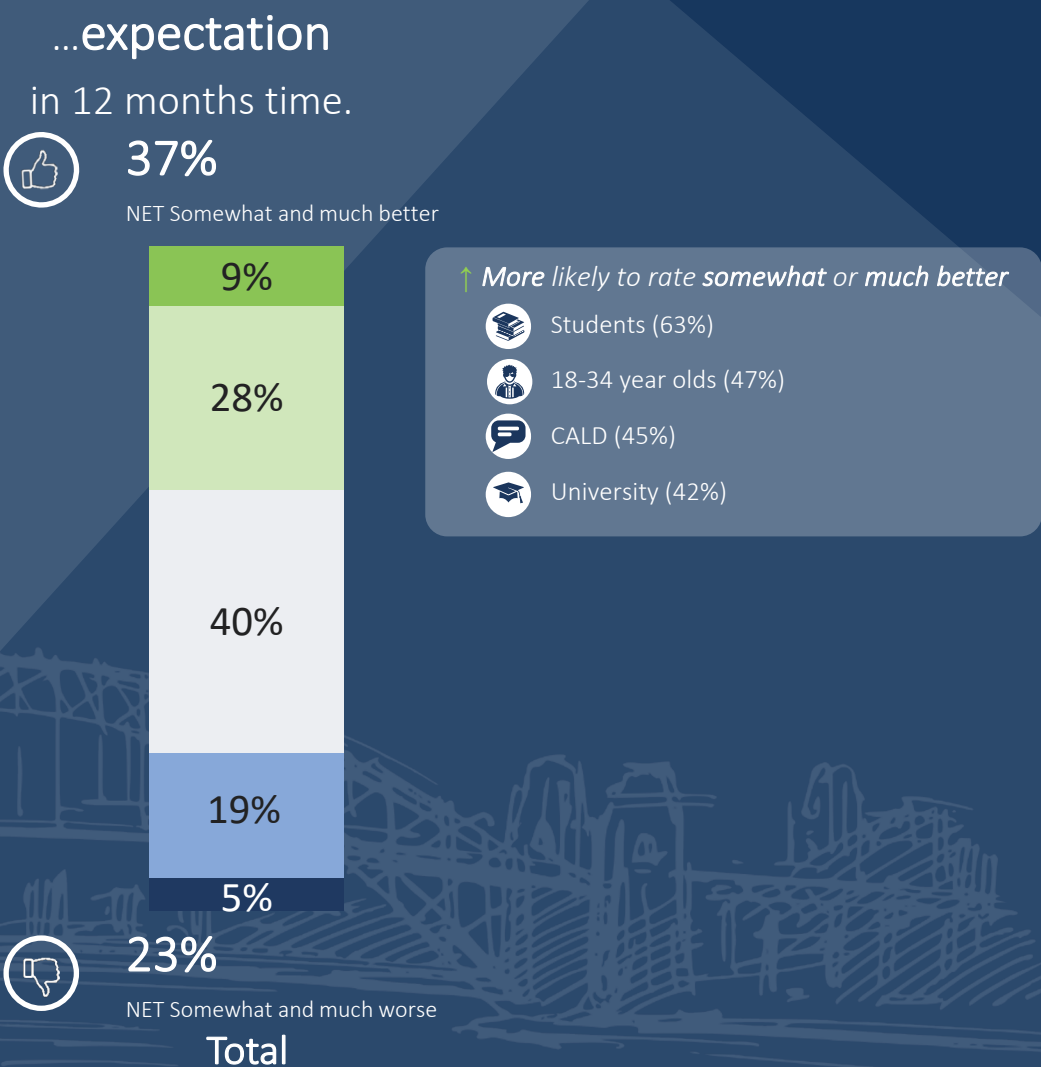


Quality of life overtime

People tend to be optimistic about their quality of life with over one third (37%) who believe it will get better in 12 months time



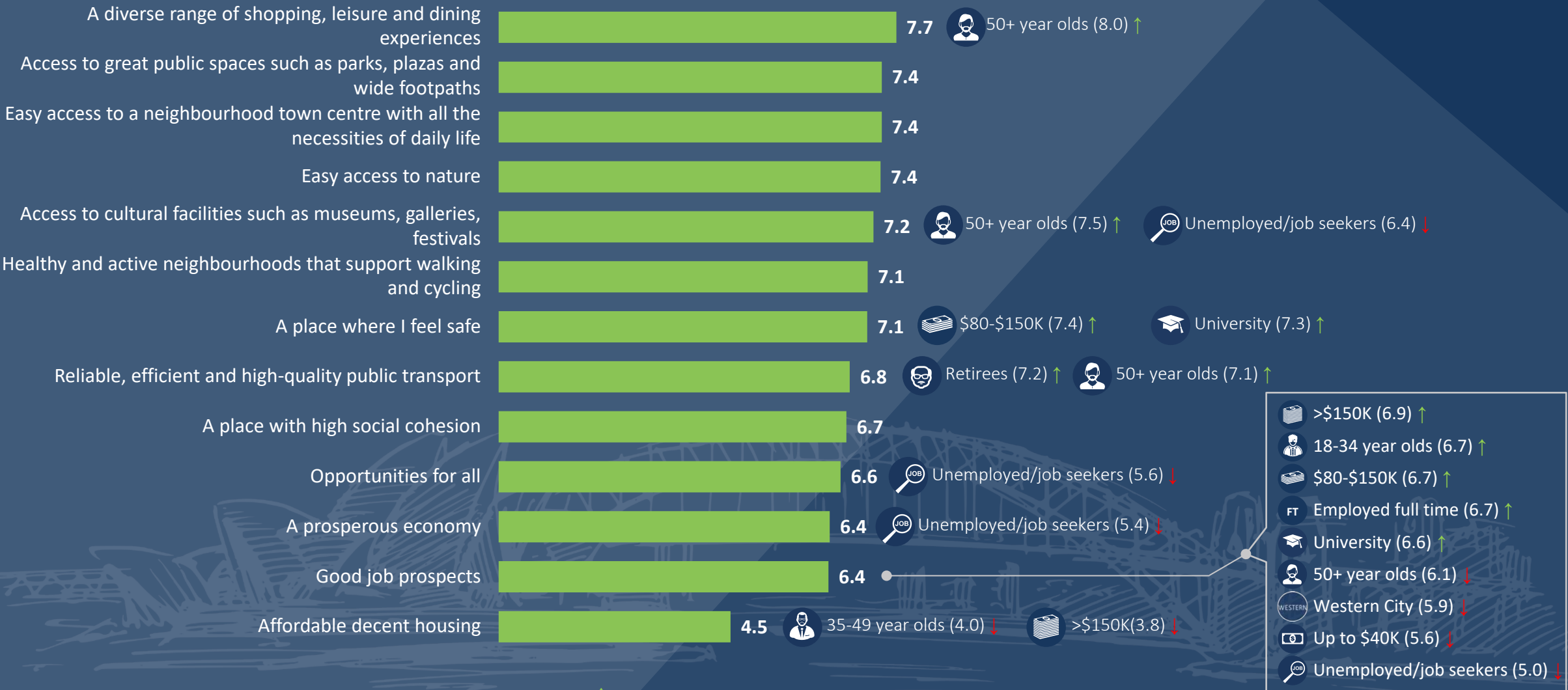
Q3. How would you rate the quality of life in Sydney compared to 12 months ago?
Base: All respondents (n=985)
Note: 'Don't know' responses excluded from the chart for analysis purposes. NET results do not always add up to proportions shown in the chart due to rounding



Q4. And do you expect your quality of life in Sydney to be better or worse in 12 months from now?
Base: All respondents (n=946)
Note: 'Don't know' responses excluded from the chart for analysis purposes. NET results do not always add up to proportions shown in the chart due to rounding

Most popular aspects of living in Sydney include access to diverse range of activities, public spaces and nature

Average score out of 10



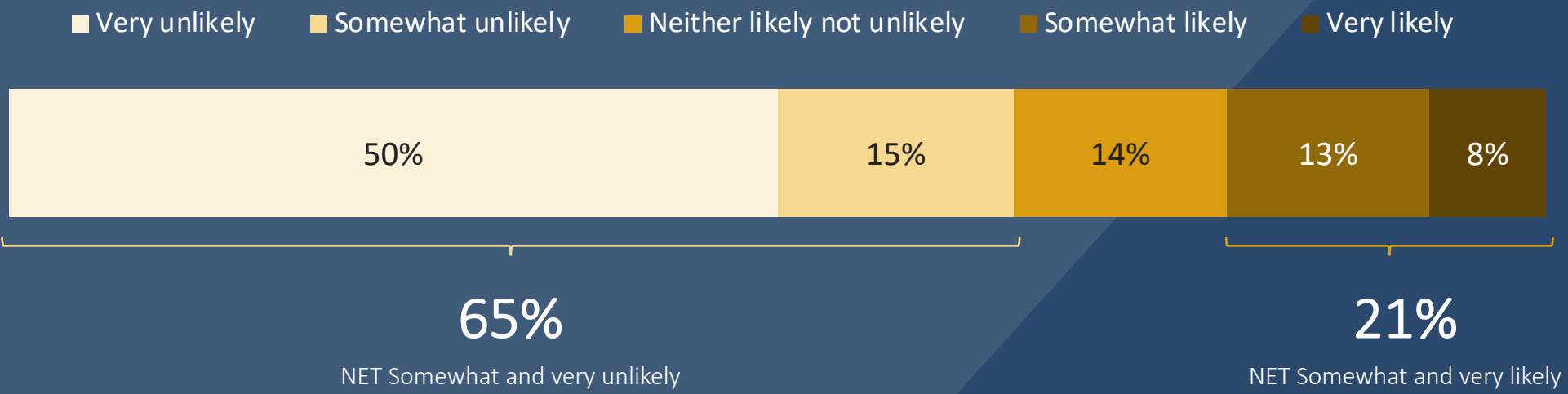
Q5. How much do you agree or disagree with each of the following statements about Sydney?
Base: All respondents (n=1005)
Note: 'Don't know' responses excluded from the calculations for analysis purposes

↑ Significantly higher than the total
↓ Significantly lower than the total

Likelihood to move away from Sydney

Around one in five (21%) of Sydneysiders are likely to move in the next few years

- These people intending to move tend to be younger or to be working full time
- Conversely, retirees and people aged 50 and over are less likely to move



↑ *More likely to rate **somewhat** or **very unlikely***

- Retirees (84%)
- 50+ year olds (77%)
- School (Y10-Y12) (74%)

↓ *Less likely to rate **somewhat** or **very unlikely***

- FT Employees (59%)
- 18-34 year olds (58%)
- 35-49 years olds (57%)

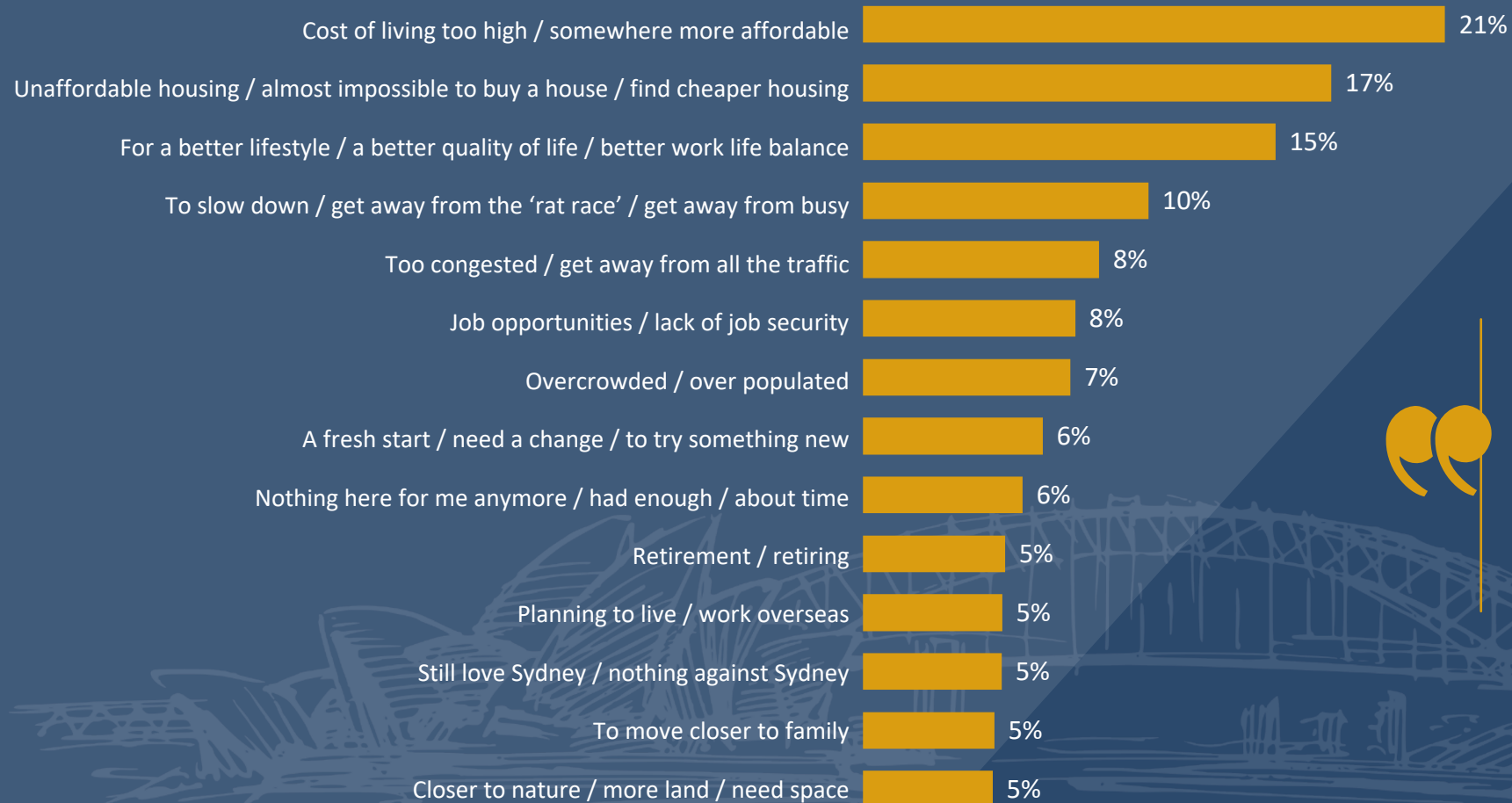
↑ *More likely to rate **somewhat** or **very likely***

- FT Employees (25%)

Q6. How likely or unlikely are you to move away from Sydney in the next few years?
Base: All respondents (n=959)
Note: 'Don't know' responses excluded from the chart for analysis purposes

High cost of living is the first reason prompting people to consider moving away from Sydney

- Secondary drivers include seeking a better lifestyle and work life balance



I'm not really but I should for a more affordable life and to give my kids the home they deserve.

Q7. Please describe why you are likely to move away from Sydney in the next few years.

Base: Those likely to leave Sydney in the next few years (n=194)

Note: Labels under 5% not shown to avoid cluttering the slide



COMMUNITY EXPERIENCE AND SENTIMENT

TRAVEL AND TRANSPORT



TRAVEL AND TRANSPORT

We aimed to find out what modes of transport Sydneysiders are using to commute to and from work or place of study and understand their experiences of the travel network.

Our results show that the majority of people are satisfied with their current commute, with less than 15% of respondents dissatisfied.

Although a similar proportion of commuters use cars and public transport, cars tend to be more prominent (55%) especially in Western Sydney. While public transport is more popular among younger age groups and those living in Eastern City.

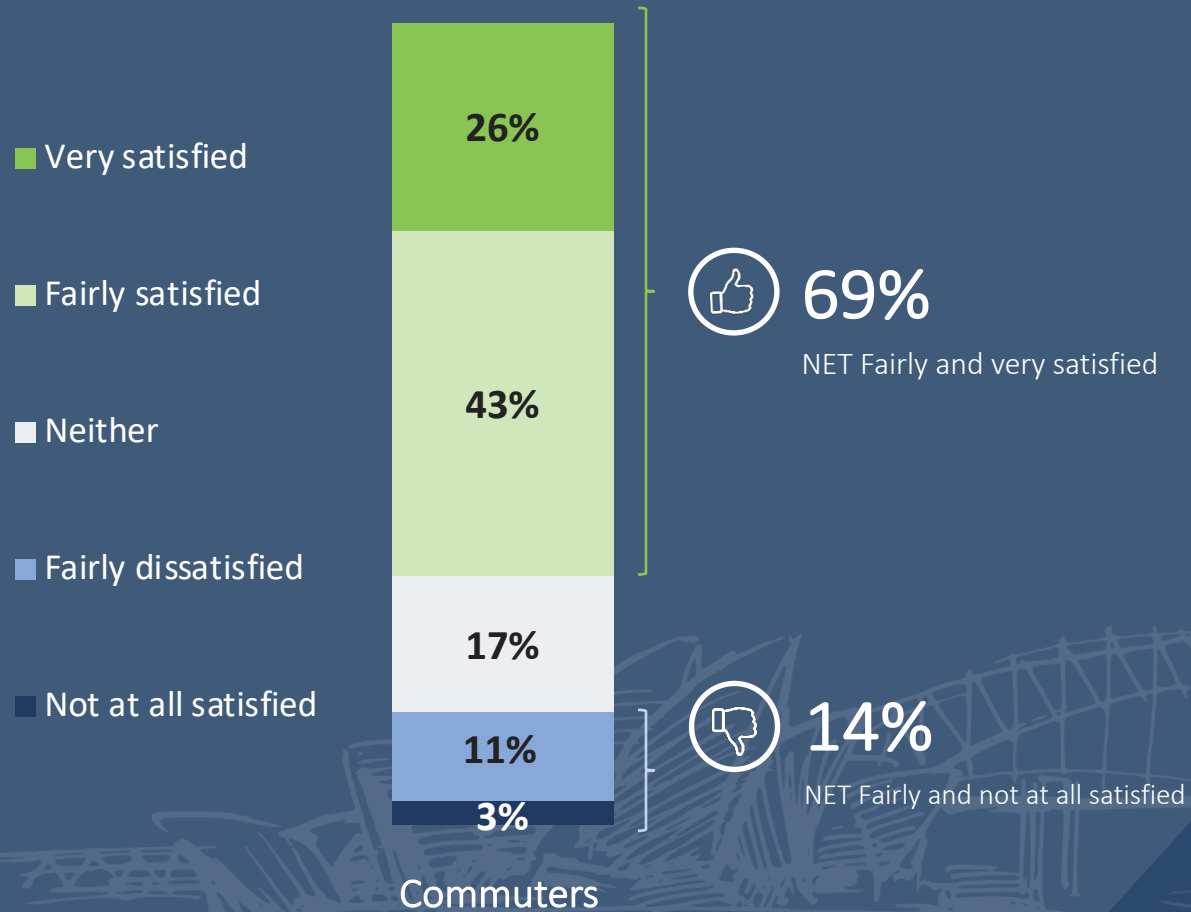
The average commute time for those surveyed was almost 45 minutes per journey, although interestingly it is considerably higher for students.

Majority of people surveyed support building new cycling lanes in Sydney. Road safety is a key barrier with nearly half (46%) of Sydneysiders indicating they would cycle more if the roads were safer for cyclists.

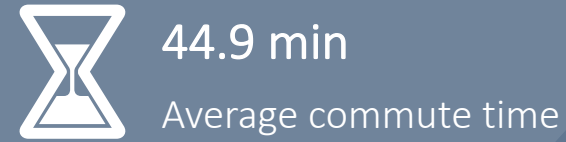


Majority (69%) of Sydneysiders are satisfied with their current commute

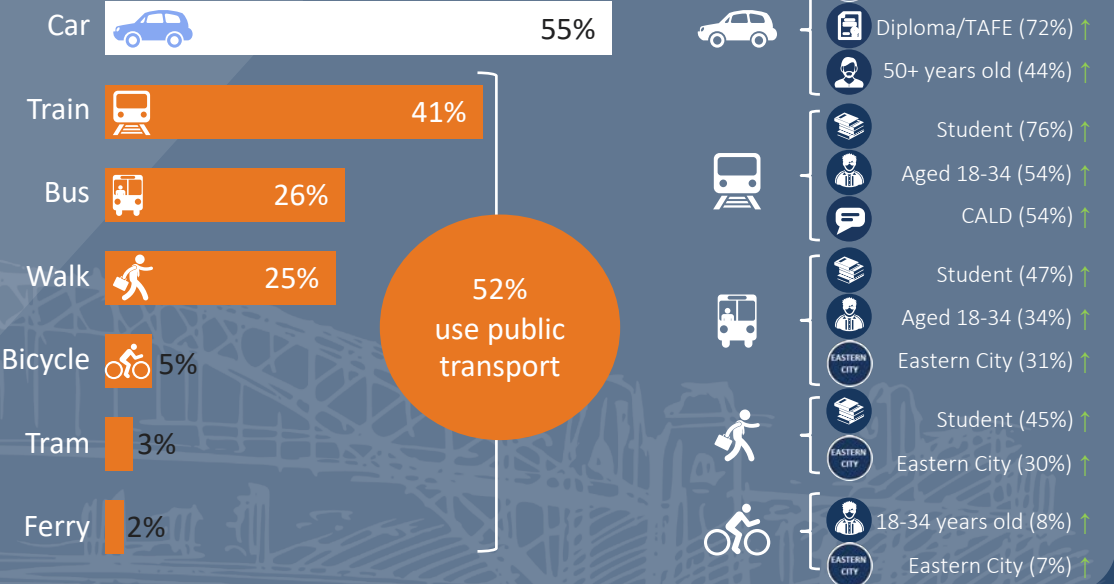
- It takes on average around 45 minutes for people to get to/from work or place of study
- The proportion of car and public transport commuters is fairly similar



Q16 How satisfied are you with your **current** commute to and from work/your place of study?
Base: All workers or students who currently commutes to/from work or study, excluding those that selected 'don't know/not sure' at Q15 (n=500)



♂ Male 50.0 min ↑ 👤 18-34 year olds 51.9 min ↑ 🎓 Students 61.5 min ↑



Q14 Approximately, how long does your commute (i.e. travel) to work/your place of study **currently** take?
Q15 Which, if any, of the following modes of transport do you **currently** use to commute to and from work/your place of study?

The main drivers of satisfaction with commute relate to convenience

Easy access, short and easy trip generate satisfaction



Easy bus to and from work, fairly frequent, many options.

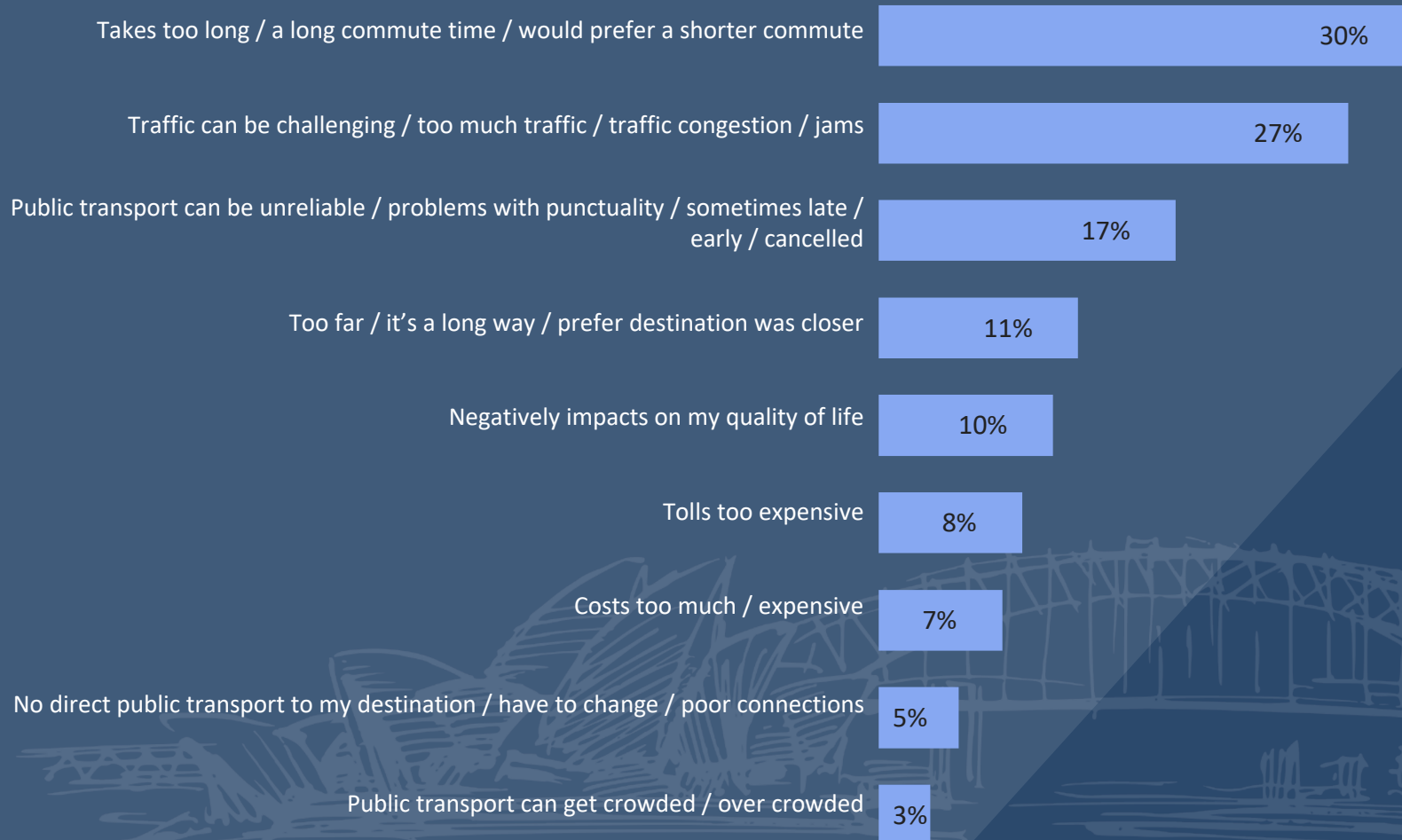
Q17. Why do you say that?

Base: Those satisfied with their current commute (n=347)

Note: Labels under 2% not shown to avoid cluttering the slide



Conversely, long commute, congested traffic and unreliable transport drive dissatisfaction



Q17. Why do you say that?

Base: Those dissatisfied with their current commute (n=70)

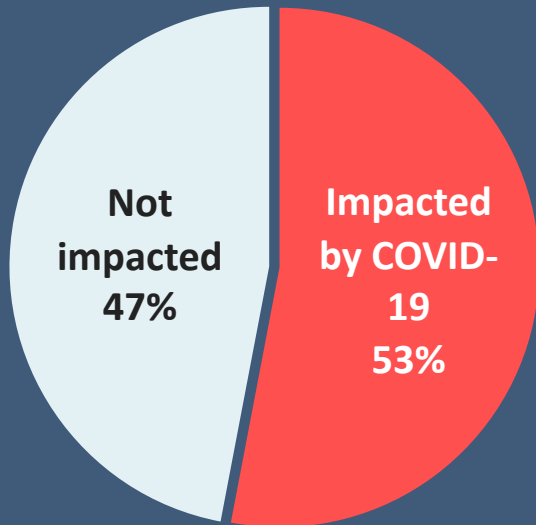
Note: Labels under 3% not shown to avoid cluttering the slide



Around half (53%) of commuters have been impacted by COVID-19

- The average travel time of impacted commuters tends to be slightly lower
- COVID-19 had very minimal to no impact on travel mode on those specifically impacted commuters

Commuters



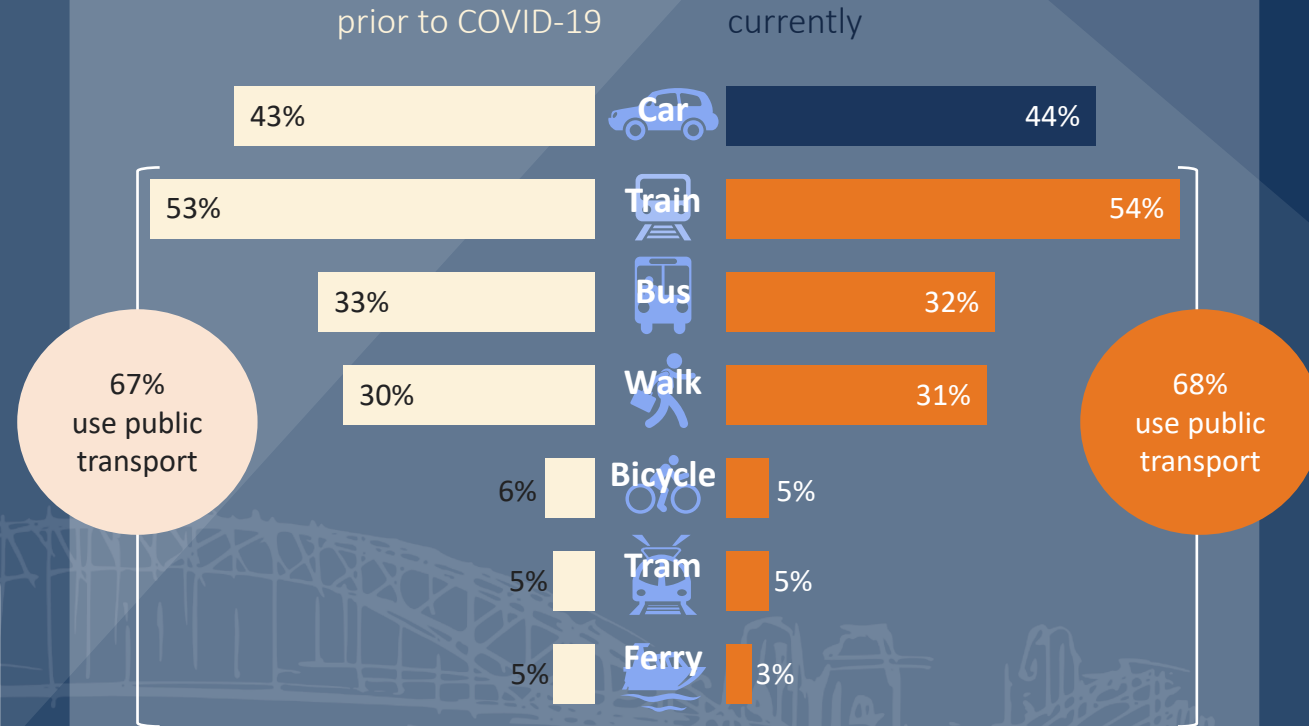
↑ *More likely to be impacted*

- Student (69%)
- 18-34 year olds (64%)
- Uni grads (61%)
- CALD (60%)

Average commute time



Mode of transport used



Q18 Now think about your commute to and from work/your place of study **prior to the recent restrictions related to Covid-19**.

Has this commute been impacted by the **recent restrictions related to Covid-19**?

Base: All workers or students who currently commutes to/from work or study, excluding those who selected 'don't know/not sure' in Q15 (n=500)

Q14 Approximately, how long does your commute (i.e. travel) to work/your place of study **currently** take?


Q15 Which, if any, of the following modes of transport do you **currently** use to commute to and from work/your place of study?

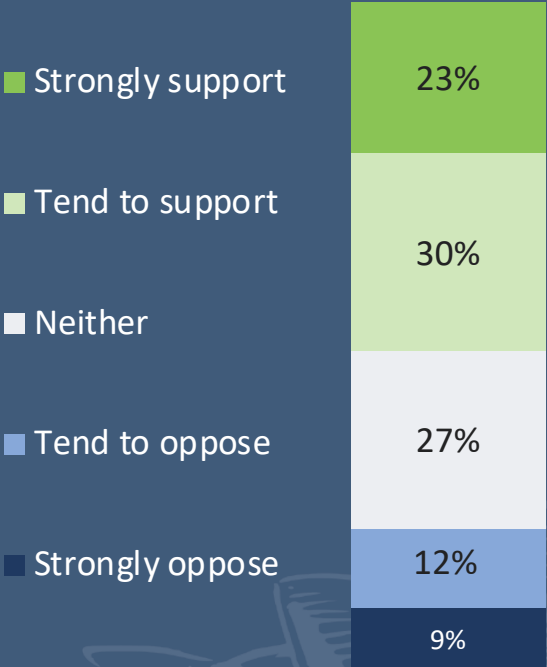
Base: Those whose commute has been impacted by COVID-19 (n=320)




Around half (52%) of Sydneysiders support the addition of new cycling lanes in their city

Level of support for new cycling lanes in Sydney



 **52%**
NET Tend to and strongly support






 **21%**
NET Tend to and strongly oppose

Total

↑ *More likely to support*

	18-34 year olds	(65%)
	Uni grads	(64%)
	CALD	(61%)




↓ *Less likely to support*

	School (Y10-Y12)	(43%)
	50+ year olds	(41%)
	Diploma/TAFE	(39%)
	Retirees	(37%)

↑ *More likely to oppose*

	Retirees	(37%)
	50+ year olds	(32%)
	Diploma/TAFE	(31%)
	Male	(25%)
	Non-CALD	(25%)

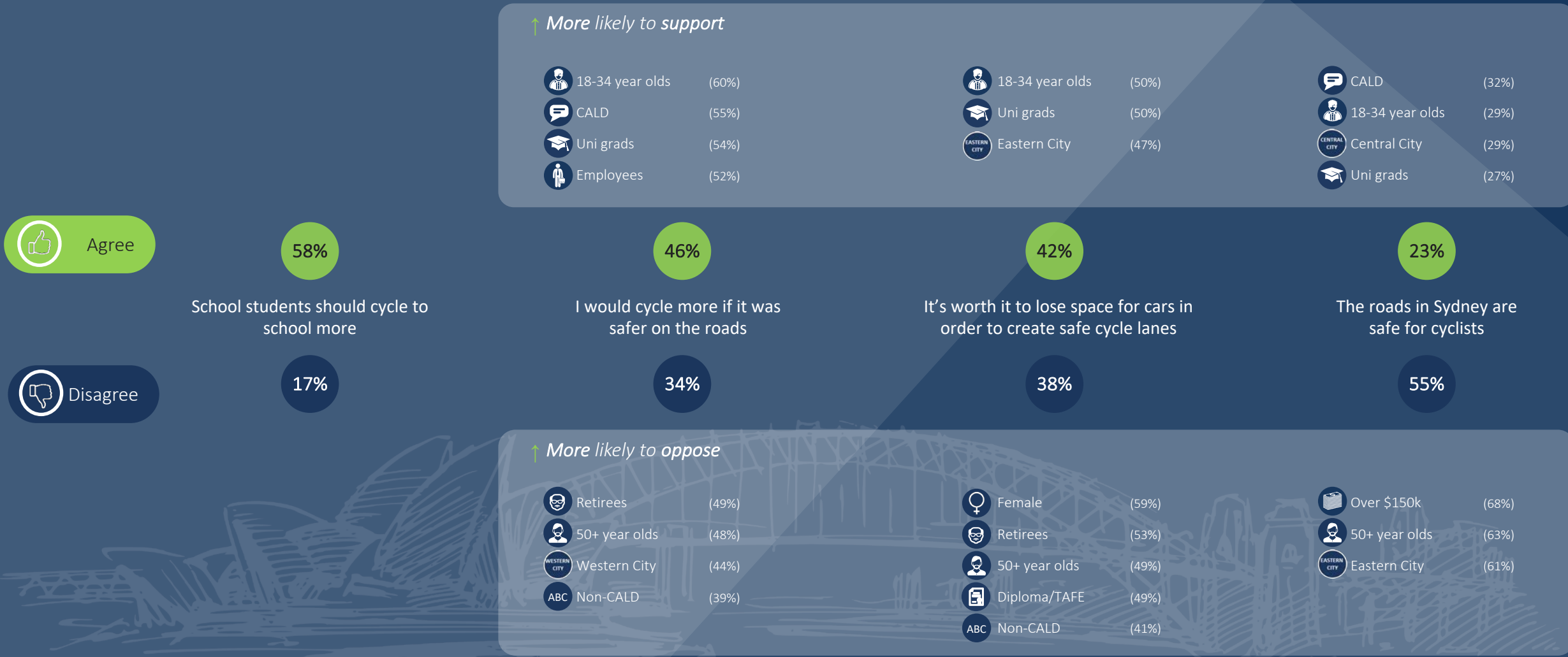
↓ *Less likely to oppose*

	Uni grads	(15%)
	18-34 year olds	(9%)
	Student	(5%)

Q12. To what extent do you support or oppose the addition of new cycling lanes in Sydney?
Base: All respondents (n=977)
Note: 'Don't know' responses excluded from the chart for analysis purposes

Nearly half (46%) of Sydneysiders would cycle more if the roads were safer

- This safety barrier is reinforced by a strong perception around roads in Sydney being unsafe for cyclists



Q13. How much do you agree or disagree with each of the following statements about cycling?
Base: All respondents (n=1005)
Note: 'Don't know' responses excluded from the chart for analysis purposes



COMMUNITY EXPERIENCE AND SENTIMENT

IMPACT OF COVID-19



IMPACT OF COVID-19

Like most cities around the world, Sydney has been significantly disrupted by the COVID-19 pandemic.

Life in Sydney shows that work habits have changed, with over half of respondents saying that they now work from home. Those tend to be university students and people in full-time employment, while people living in Western Sydney and in part-time employment are less likely to be working from home.

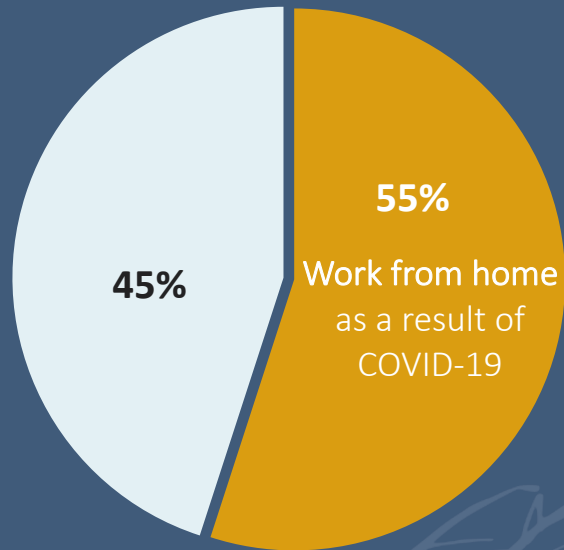
A majority of respondents rated the response to the pandemic by the NSW government as 'very' or 'fairly good'. People aged 50 and over were most likely to rate the government's response as positive.



More than half (55%) of Sydneysiders workers have been working from home as a result of COVID-19

- Most of those people feel very positive about working from home in terms of time saving and other benefits (e.g. productivity, mental health)
- Nearly three quarters (73%) even prefer this setting

Workers



↑ More likely to work from home

- University (66%)
- 35-49 years old (61%)
- Employed full time (61%)

↑ More likely to *not* work from home

- Up to \$40K (67%)
- School (Y10-Y12) (66%)
- Diploma/TAFE (61%)
- 50+ year olds (60%)
- Western City (60%)
- Employed part time (60%)
- \$40-\$80K (56%)

Q22. As a result of the recent health restrictions have you been working from home?
Base: Those who work (n=556)



Disagree



Agree

3% It saves me a lot of time 90%

15% Overall, I prefer working from home 73%

15% I am more productive 65%

23% It is better for my mental health and wellbeing 56%

27% It is better for my physical health 52%

Q23 How much do you agree or disagree with each of the following statements about your experience of working from home?

Base: Those working from home due to COVID-19 (n=300)



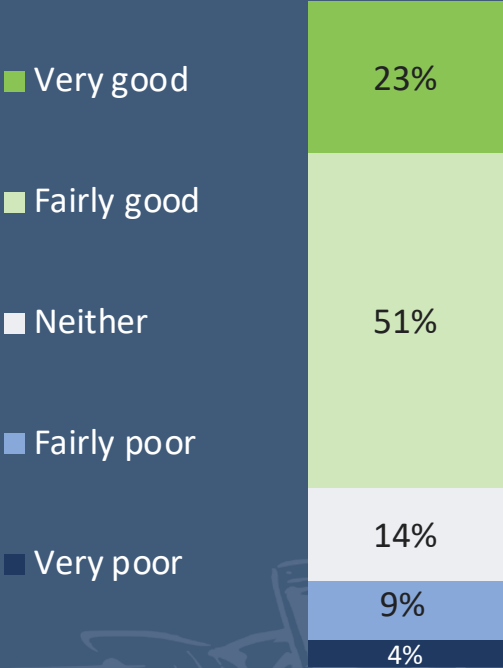
Majority (73%) of Sydneysiders rate positively the NSW Government management of COVID-19

Rating of the NSW
Government management of
COVID-19



73%

NET Fairly and very good



13%

NET Fairly and very poor

Total

↑ More likely to rate positively



50+ years old (79%)

↓ Less likely to rate positively



Aged 18-34 (65%)



Unemployed/Job seekers (58%)

↑ More likely to rate negatively



Unemployed/Job seekers (24%)

Q24 Overall, how would you rate the NSW Government management of the COVID-19 pandemic?
Base: All respondents (n=1005)
Note: 'Don't know' responses excluded from the chart for analysis purposes

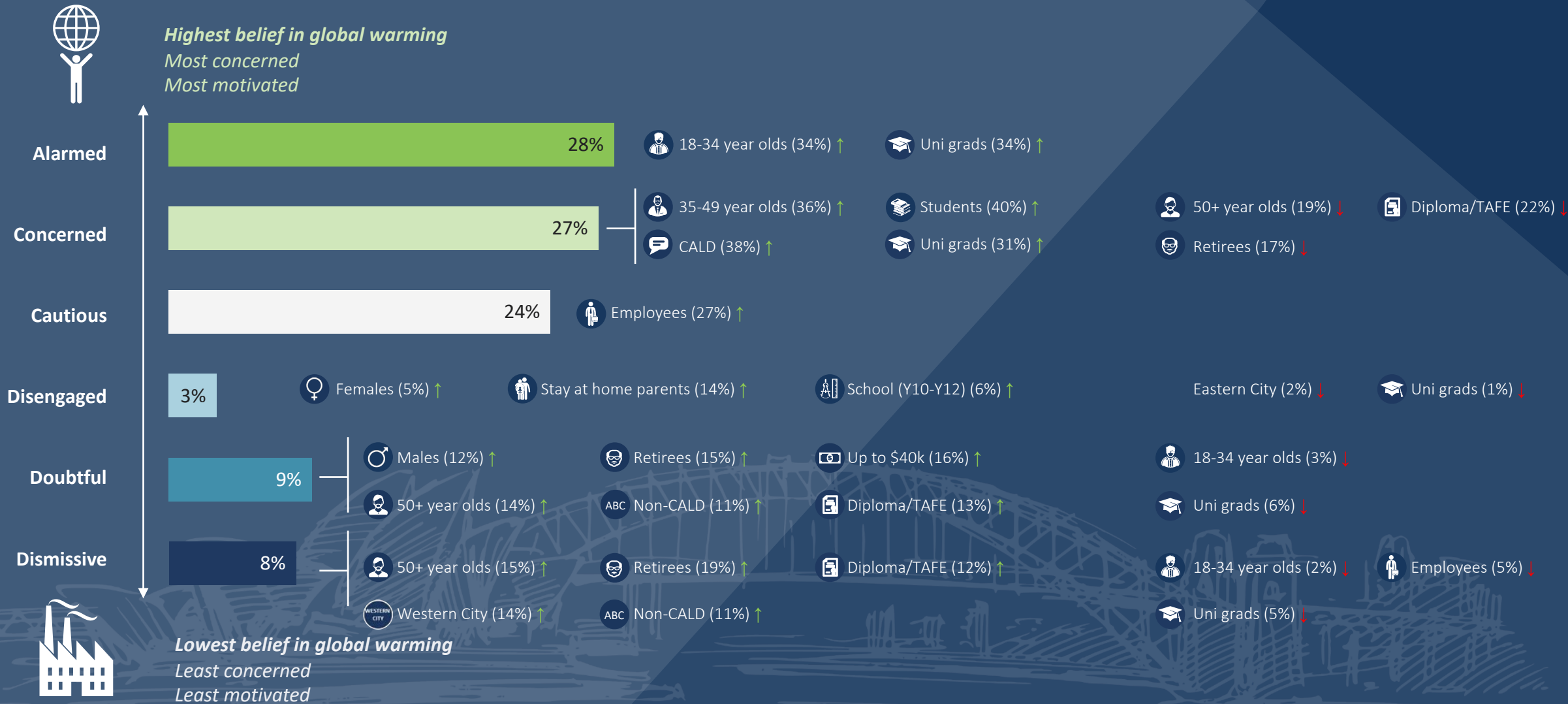


COMMUNITY ATTITUDES

CLIMATE CHANGE AND GLOBAL WARMING



Six Americas Super Short Survey (SASSY)
Sydneyiders tend to be concerned about global warming with a higher proportion qualifying as ‘alarmed’ (28%) and ‘dismissive’ (8%)



Q8. How important is the issue of global warming to you personally?
Q9. How worried are you about global warming?
Q10. How much do you think global warming will harm you personally?

Q11. How much do you think global warming will harm future generations of people?
Base: All respondents (n=1005)

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