Frankston City Council

2021 Household Survey

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Introduction

The Social Policy and Planning Unit of City of Frankston commissioned Metropolis Research to conduct this, Council's first *Household Survey*.

The survey provides a meaningful and reliable snapshot of the population of the City of Frankston, 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 Frankston City community.

The 2021 *Household Survey* provides insight into the following:

- ***Demographic profile*** – including age, gender, country of birth, Aboriginal and / or Torres Strait Islander, language, household size, household structure, income, period of residence, and disability by type, assistance required with a disability, and type of assistance required.

- ***Health and Wellbeing*** – including perception of physical and mental health, seeking support for mental health issues, physical activity, consumption of fruit and vegetables.

- ***Arts and culture*** – including participation in / attendance at selected arts and cultural activities (primarily Council and local events and activities).

- ***Sports, recreation, and leisure*** – including frequency of and reasons for visiting local parks, gardens, and open spaces, participation in selected recreation and leisure activities, participation in organised / formal sports and recreation activities.

- ***Community participation*** – including volunteering locally, participation in community groups, and types of community groups.

- ***Education*** – including attendance at educational institutions, post-secondary school qualifications, suitability of educational opportunities in Frankston and reasons why they might not be suitable.

- ***Employment*** – including employment status, satisfaction with current employment situation, occupation, industry, employment location, working from home, period of unemployment, barriers to finding employment, and preferred type of employment.

- ***Transport*** – includes journey to work and study, frequency of public transport use, factors that may encourage additional public transport use, bicycle ownership, frequency of cycling, and factors that may encourage additional cycling, number of motor vehicles per household, and ease of getting to surrounding suburbs by car, train, bus, bicycle, and walking, and the importance of major transport infrastructure improvements

- ***Housing*** – including both current and preferred dwelling type, current and preferred number of bedrooms, importance of 14 selected aspects in the choice to live in the dwelling, housing situation, housing payments, and potential emigration.

- ***Community services*** – including current use of, services required but unable to access, and potential future demand for selected children's services, aged and disability services, and community support services.

- ***Local neighbourhood*** – including importance of 27 selected aspects in the decision to live in the neighbourhood.
- ***Development in Frankston*** – including agreement with selected statements about housing development in Frankston City, preferred improvements to Frankston City Centre, and other ideas to improve Frankston City Centre.
- ***Retail trade*** – including shopping centres most often used for daily shopping needs, regular grocery shopping, clothing and comparison goods shopping, larger household goods shopping, and dining out and entertainment.
- ***Environment and sustainability*** – including current and potential future participation in selected environmental actions, preparedness to cope with extreme weather, and heating and cooling use.
- ***Rural land*** – including owning or living on rural land in Frankston City, running an agribusiness, and land management practises.

This report has been prepared to provide a detailed overview of the results and to summarise many of these results for each of the 11 precincts within the municipality. The report also provides an examination of many of the results by demographic profile, including age structure, gender, language spoken at home, disability status, household structure, and personal or household income.

Readers are encouraged to contact the Social Policy and Planning Unit, City of Frankston directly to discuss the application of the data presented in this report to specific situations.

Methodology, response rate, and statistical significance

The *Frankston City Council – 2021 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 Frankston City community.

The 201 *Household Survey* was a self-assessment survey distributed primarily via a drop-off and mail-back methodology over two weeks in July 2021. The usual method of distributing the *Household Survey* is for staff to attend at each randomly approached household, introduce the survey to the resident, invite them to participate, and then to leave the survey with the household to complete. Staff then personally return three to four days later to collect the completed surveys.

This method has proved extremely reliable in obtaining a sample of the community that reflects the demographic and socio-economic profile of the community. However, due to the COVID-19 lockdown and social distancing requirements through mid-2021, the survey was distributed directly to household's letterboxes by staff in person, without speaking to the residents to discuss the survey. This change in the methodology did have an impact both on the raw number of surveys that were returned, as well as the demographic and socio-economic profile of the survey respondents.

A total of 2,250 surveys were distributed using the drop-off and pick-up methodology in the 10 urban precincts of Frankston City, 200 were distributed to Langwarrin South and the rural areas of Skye using a mail-out and reply-paid service, and an extra mail-out of 200 surveys was undertaken to addresses in Carrum Downs to increase their inclusion in the survey.

An approximately equal number of surveys were distributed in each of the ten urban precincts of Frankston City 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.

Metropolis Research selected at random 144 Statistical Area Level One (SAL1s) areas, with approximately thirteen selected in each of the 10 urban precincts. The exact number of SAL1s varies from precinct to precinct depending on the available number of SAL1 in each precinct from which to draw the sample. An approximately equal number of households were then surveyed in each of the SAL1s.

The final sample of households invited to participate in the research were selected at random by staff in the field, subject to a set of rules in relation to the number of streets within each SAL1 to be included, and where appropriate a minimum proportion of various housing types.

This approach has been used to great success in ensuring a consistent and representative sample of the underlying population over many years in numerous municipalities across metropolitan Melbourne (including the cities of Banyule, Boroondara, Darebin, Hume, Melbourne, Melton, Port Phillip, Stonnington, and Whittlesea).

Metropolis Research does note that the change in the methodology did result in a skew in the sample, with older residents over-represented over younger residents. This has impacted on a range of other results in the report, including for example the level of disability, participation in some activities, demand for some community services, employment, and income.

A full breakdown of most questions in the survey has therefore been undertaken in the main report by age structure, gender, language spoken at home, disability, household structure, and personal and household income, where appropriate to fully explore the data and to make clear any variation in results between different groups in the community.

Response rate

A total of 2,650 household surveys were distributed. Of these 2,250 were distributed in person to selected households across the 10 urban precincts of the municipality, 200 were further mailed out to households across Carrum Downs to increase their response rate, and 200 were mailed to residents in the rural areas of Langwarrin South and rural Skye.

Of these 2,650 distributed surveys, a total of 704 were ultimately returned for inclusion in the research, comprised of 1,610 individual respondents.

This is a gross response rate of 26.5%, which is significantly lower than the approximately 40% to 45% typically recorded by Metropolis Research using the personal drop-off and pick-up service that was originally planned for this project.

Statistical strength

The total sample for the 2021 *Household Survey* was 704 households comprising 1,610 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 2.4% at the 50% level.
- Municipal household results – plus or minus 3.7% at the 50% level.
- Precinct person results (of all respondents) – plus or minus 8% at the 50% level.
- Precinct household results – plus or minus 12% at the 50% level.

In other words, if a yes / no question asked of every individual obtains a result of 50% yes, it is 95% certain that the true value of this result is within the range of 47.6% and 52.4%. The confidence interval is smaller the further the result is from the 50% level.

This is based on a sample of 1,610 individual and 704 household respondents and a population of Frankston City of 143,338 residents and 52,699 households.

Demographic profile

Age and gender

- The median age of *Household Survey* respondents was 48 years, notably higher than the 2016 *Census* median age of 38 years.
- This variation in the age structure reflects the change in methodology to a contactless method, rather than the planned personal interaction drop-off and pick-up survey.
- Due to the variation in the age structure, the main report provides a breakdown of questions by age structure (for person questions) and by an expanded age-based household structure (for household questions).
- The median age was highest in Langwarrin (52 years) and Frankston North (51 years) and lowest in Carrum Downs (42 years).
- The *Household Survey* sample included 48.1% male, 51.7% female, and 0.2% non-binary respondents. These results are consistent with the 2016 *Census*.

Household size and structure

- The average household size of respondent households was 2.24 persons per household. This result was lower than the 2016 *Census* average of 2.47 persons. This variation reflects the older age structure which resulted from the change in the methodology.
- The household size was largest in the rural precinct (2.82 persons) and lowest in Frankston North (1.91).
- Approximately one-quarter (23.9%) of households were two-parent families, six percent were one-parent families, 41.2% were couple households, 25.3% were sole person households, 1.4% were group households, and 2.3% were extended or multiple families.
- The household structure results over-represent older sole person and older couple households without children and under-represent one and two-parent families with children aged under 18 years. This skew reflects the older age structure resulting from the change in methodology.

Diversity

- Consistent with the 2016 *Census* results, approximately three-quarters (72.9%) of respondents were born in Australia.

- The most common countries of birth were England (7.1%), New Zealand (2.8%), the Philippines (1.6%), Scotland (1.6%), and India (1.3%). These results are broadly consistent with the 2016 *Census* results.

- Overseas born respondents were evenly split between those born in mainly English-speaking countries (13.3%) and those born in mainly non-English speaking households (13.2%).

- Respondents from Sandhurst (39.4%) were the most likely to be born overseas, whilst respondents from the rural precinct (16.1%) were the least likely.

- Almost one percent (0.9%) of respondents identified as Aboriginal and / or Torres Strait Islander, consistent with the 2016 Census result of 1.1%.

- Nine percent of respondents preferred to speak a language other than English at home, a result only marginally lower than the 2016 *Census* result of 12.1%.

- Respondents from Skye (15.4%) were the most likely to prefer to speak a language other than English at home and respondents from Seaford (3.0%) were the least likely.

- Consistent with the 2016 *Census*, the most common other preferred spoken languages were Italian (0.9%), Arabic (0.8%), Tagalog (0.8%), Greek (0.6%), and Hindi (0.4%).

Income

- The median personal income (from all sources) of respondents aged 15 years and over was $37,700. This represents an increase of 9.8% over the 2016 *Census* median income of $34,320, an increase of approximately two percent per year (i.e., similar to the rate of inflation).

- The median income was highest in Skye ($46,748) and lowest in Frankston North ($27,664) and Karingal ($27,248).

- The median income of full-time and self-employed respondents aged 15 years and over was $90,329. This result was identical to the Australian average full-time wage of $90,329.

- Full-time and self-employed female respondents reported a median income 14.2% lower than that of male respondents.

- Full-time and self-employed respondents who prefer to speak a language other than English at home reported a median income 10.3% lower than the median income of English-speaking respondents.

- The median household income was $84,500 per annum, a result that was 22% higher than the 2016 *Census* median household income of $69,212. This result was based only on respondent households where every individual aged 15 years and over provided an answer to the income question.

Period of residence

- Approximately one-third (32.6%) of respondents had lived at their current address for less than five years, one-sixth (18.6%) between five and less than 10 years, and almost half (48.8%) had lived at their current address for 10 years or more.

- Respondents from Frankston South (77.2%) were the most likely to have lived at their current address for five years or more, whilst respondents from Seaford (47.0%) were the most likely to have lived at their current address for less than five years.

- There was some variation in these results observed by age structure, with young adults (aged 20 to 34 years) the most likely to have lived at their current address for less than five years (59.1%), and senior citizens (aged 75 years and over) the most likely to have lived at their current address for 10 years or more (73.5%).

- Most respondents who had lived at their current address for less than five years moved a relatively short distance to their current address, with 37.3% moving within the City of Frankston, 15.6% moving from the Mornington Peninsula region, and 15.4% moving from the southern Melbourne region.

- The most common previous suburbs of residence of respondents who had lived at their current address for less than five years were Frankston (15.7%), Langwarrin (6.95), Seaford (6.4%), Cranbourne (5.4%), Mornington (4.5%), and Frankston South (4.0%).

Disability

- Approximately one-third (34.1%) of respondents reported that they had a permanent or long-term disability.

- This result was impacted by the skew in the age structure that resulted from the change in methodology due to COVID-19.

- Disability status was highly related to age structure, with 18.1% of young adults (aged 20 to 34 years) reporting that they had a permanent or long-term disability, increasing to 72.6% of senior citizens (aged 75 years and over).

- Respondents who prefer to speak a language other than English were measurably more likely to report having a disability than English speaking respondents (42.3% compared to 33.6%).

- Respondents from Karingal (49.6%) and Frankston North (45.9%) were the most likely to report having a permanent or long-term disability, whilst respondents from the rural precinct (25.4%), Frankston South (25.3%), and Sandhurst (23.2%) were the least likely.

- Consistent with the older age structure, the most common form of disability was a long-term medical condition (13.5%). Other forms of disability included vision impairment (11.7%), hearing impairment (11.2%), mental health or psychological condition (6.85), and physical disability / limited mobility (5.9%).

- One-fifth (20.6%) of respondents with a permanent or long-term disability (who provided a response to this question) reported that they required assistance with their disability.

- Respondents with a disability from Frankston Central (39.5%) were the most likely to require assistance with their disability, whilst respondents with a disability from Sandhurst (7.4%) were the least likely.

- Taking together the overall disability results and the require assistance with disability results, 5.4% of the total sample reported that they required assistance with a disability.

Health and wellbeing

Physical health

- The overwhelming majority (85.2%) of respondents rated their physical health as "excellent", "very good", or "good", whilst 12.5% rated it as "fair" and 2.3% rated it as "poor".

- There was no meaningful variation in this result between male and female respondents.

- There was variation in this result observed by age structure, with younger respondents more likely than older respondents to rate their physical health as "excellent". It is noted, however, that older respondents were no more likely to report "fair" or "poor" physical health than younger respondents.

- Respondents from the rural precinct (33.3%) and Frankston South (31.3%) were the most likely to report their physical health as "excellent", whilst respondents from Frankston North (23.4%) and Karingal (24.7%) were the most likely to report their physical health as "fair", or "poor".

Mental health

- The overwhelming majority (83.2%) of respondents rated their physical health as "excellent", "very good", or "good", whilst 14.0% rated it as "fair" and 2.7% rated it as "poor".

- There was no meaningful variation in this result between male and female respondents.

- There was no consistent pattern to variation in the perception of mental health observed by age structure. Respondents aged from 13 years to 59 years were the most likely to report their mental health as "fair" or "poor".

- Respondents from the rural precinct (36.8%) and Frankston Heights (32.2%) were the most likely to report their mental health as “excellent”, whilst respondents from Frankston North (23.9%) and Carrum Downs (26.3%) were the most likely to report their mental health as “fair”, or “poor”.

- Approximately two-thirds (68%) of respondents who rated their mental health as “fair” or “poor” reported that they had sought help or support through formal counselling or support (53.1%) or informal support such as family and friends (14.9%).

- It is possible that COVID-19 impacted on these results, particularly in relation to the seeking of formal support. It is also noted that seeking counselling or support is not the same as receiving counselling or support.

Physical activity

- Respondents were relatively diverse in terms of the amount of time they spent doing moderate to vigorous physical activity in the last week, with a little more than half (53.6%) doing 2.5 hours or more per week and 46.4% doing less than 2.5 hours per week.

- Respondents from Frankston South (67.3%) were the most likely to be doing 2.5 hours moderate to vigorous physical activity per week, whilst respondents from Karingal (41.7%) were the least likely.

- There was no linear relationship between the respondents’ age and the amount of moderate to vigorous physical activity they did in the last week.

- It is noted that children (aged 5 to 12 years) (75.7%) were the most likely to do 2.5 hours or more, whilst middle-aged adults (aged 46 to 59 years) (53.5%) and senior citizens (aged 75 years and over) (51.3%) were the most likely to do less than 2.5 hours.

- Male respondents (57.0%) were more likely than female respondents (50.5%) to do 2.5 hours or more of moderate to vigorous physical activity in the last week (57.0% compared to 50.5%).

- English-speaking respondents (54.2%) were more likely than respondents who prefer to speak a language other than English at home (44.7%) to do 2.5 hours or more moderate to vigorous physical activity in the last week (54.2% compared to 44.7%).

Consumption of fruit and vegetables

- Approximately two-thirds (62.4%) of respondents reported that they consume at least two serves of fruit per day.

- Respondents from Frankston Central (70.8%) were the most likely to consume at least two serves of fruit per day, whilst respondents from the rural precinct (49.5%) were the least likely.

- There was some variation observed by age structure, with young children (aged 0 to 4 years) (86.0%) and senior citizens (aged 75 years and over) (73.3%) the most likely to consume two serves of fruit per day, and young adults (aged 20 to 34 years) (49.4%) and middle-aged adults (aged 45 to 59 years) (46.0%) the most likely to not consume two serves per day.

- There was no meaningful variation observed by gender, although it is noted that multi-lingual respondents (76.2%) were more likely than English-speaking respondents (61.0%) to consume two serves of fruit per day.

- A little more than half (52.6%) of respondents reported that they consume at least five servings of vegetables per day.

- Respondents from Frankston Central (68.8%) were the most likely to consume at least five servings per day, whilst respondents from Karingal (38.5%) were the least likely.

- There was less variation in the consumption of vegetables observed by age structure than there was for the consumption of fruit. Young children (aged 0 to 4 years) (55.9%) were, however, the most likely to consume five servings and adolescents (aged 13 to 19 years) (48.4%) were the least likely.

Arts and culture

Arts and cultural activities

- Approximately two-thirds (65.5%) of respondents reported that they participate in or attend at least one of the 11 (including "other") listed arts and cultural activities, at an average of a little less than three activities per respondent.

- The arts and cultural activities that respondents were most likely to participate in or attend were the Waterfront Festival (36.0%), Frankston Arts Centre programs and events (31.75), Frankston City Libraries services, activities, and events (28.3%) and the Festival of Lights (27.0%).

- Respondents from Frankston Central (79.6%) and Frankston South (75.8%) were the most likely to participate in at least one of the 11 activities, whilst respondents from Sandhurst (49.7%) were the least likely.

- There was a little variation in these results observed by age structure, with adolescents (aged 13 to 19 years) the least likely to participate (55.7%), and adults (aged 35 to 44 years) the most likely (72.5%).

- Female respondents (70.0%) were more likely to participate / attend these events than male respondents (60.0%), and multi-lingual respondents (73.6%) were more likely than English speaking respondents (64.8%).

Sports, recreation, and leisure

Use of local open spaces (parks and gardens)

- More than half (58.6%) of respondents reported that they visit parks, gardens, reserves, and open spaces frequently (i.e., at least once a week), with almost half (44.2%) visiting at least every few days.
- Just nine percent of respondents never visit open spaces.
- Respondents from Frankston Central (76.7%), Frankston South (70.3%) and Sandhurst (68.4%) were the most likely to frequently visit open spaces, whilst respondents from the rural precinct (42.3%) and Karingal (44.1%) were the least likely.
- There was some age-based variation in these results observed, with young children and children (aged 0 to 12 years) the most likely to frequently visit (88.0% and 82.0% respectively), and senior citizens (aged 75 years and over) the least likely (41.0%).
- The most common reasons for visiting open spaces were exercise (56.0%), walking (56.0%), foreshore / beach (48.25), and relaxation (44.7%).
- There was some age-based variation in the reasons for visiting open spaces observed, with younger respondents more likely to visit for more active reasons (such as organised and informal sports and children's play).

Recreation and leisure activities

- Almost all (92.9%) of respondents reported that they participate in / attend at least one of the 16 (including "other") listed recreation and leisure activities, at an average of 5.4 activities each.
- Respondents from Frankston North (75.2%) were the least likely to participate in at least one of the 16 listed activities.
- Young children (aged 0 to 4 years) (76.3%) were measurably less likely than average to participate in at least one activity, and senior citizens (aged 76 years and over) (87.5%) were somewhat less likely to participate in at least one activity.
- The three most common activities in which respondents participate were walking local streets / parks (72.1%), socialising with friends (62.5%), shopping (62.2%), and visiting coastal foreshore (56.9%).
- As expected, there was significant variation in the individual recreation and leisure activities in which respondents participate observed by age structure. Children and younger respondents were more likely to participate in sports and active recreational activities, whilst older respondents were more likely to participate in activities such as gardening.

Organised / formal sports and recreation activities

- A little less than half (45.3%) of respondents reported that they participate in at least one of the 16 listed (including "other") organised / formal sports and recreation activities, at an average of less than two activities each.

- These results will be impacted by the skew in the age structure of the sample towards older over younger respondents that resulted from the change in methodology due to COVID-19.

- There was significant variation in these results observed by age structure, with children (aged 5 to 12 years) (73.8%) and adults (aged 35 to 44 years) (63.8%) the most likely to participate in at least one organised / formal sports activity, and older adults (aged 60 to 74 years) (35.2%) and senior citizens (aged 75 years and over) (32.1%) the least likely.

- Respondents from Sandhurst (54.8%), the rural precinct (54.0%), and Frankston South (54.0%) were the most likely to participate in at least one activity, whilst respondents from Frankston North (34.9%) and Langwarrin (34.8%) were the least likely.

- The most common organised / formal sports and recreation activities in which respondents participate were gym / group fitness (14.4%), swimming (10.1%), and PARC (9.8%).

- There was significant variation in the individual sports and recreation activities observed by age structure, with children and adolescents (aged 5 to 19 years) the most likely to participate in organised sports like Australian Rules, swimming, basketball, netball, soccer, cricket, tennis, gymnastics, and sports lifesaving).

Community participation

Volunteering

- Approximately one-quarter (26.3%) of respondents reported that they volunteer in the local community, with 10.9% volunteering regularly, 7.7% sometimes, and 7.7% rarely.

- These results will be impacted by the skew in the age structure of the sample towards older over younger respondents that resulted from the change in methodology due to COVID-19.

- Respondents from Frankston South (35.3%) were the most likely to volunteer in the local community, whilst respondents from Frankston North (18.4%) were the least likely.

- There was some variation in these results observed by age, with older adults (aged 60 to 74 years) (31.0%) and senior citizens (aged 75 years and over) (28.1%) the most likely to volunteer in the local community, and adolescents (aged 13 to 19 years) (12.4%) the least likely.

- Female respondents were significantly more likely to volunteer in the local community than male respondents (30.8% compared to 22.0%).

Community groups

- A little less than one-quarter (22.8%) of respondents reported that they participated in any community groups.
- These results will be impacted by the skew in the age structure of the sample towards older over younger respondents that resulted from the change in methodology due to COVID-19.
- Respondents from Frankston South (31.3%) were the most likely to participate in community groups, whilst respondents from Frankston North (12.2%) were the least likely.
- There was significant variation in these results observed by age structure, with children (aged 5 to 12 years) (33.5%) and senior citizens (aged 75 years and over) (34.5%) the most likely to participate in any community groups.
- Female respondents (25.6%) were more likely than male respondents (19.7%) to participate in any community groups, and English-speaking respondents (23.0%) were significantly more likely to participate in any community groups than multi-lingual respondents (15.0%).
- The most common types of community groups in which respondents participate were sports clubs / exercise (11.2%), religious groups / places of Worship (3.5%), and arts and cultural groups (3.3%).
- There was variation in the types of community groups observed by age structure, with children (aged 5 to 12 years) more likely to participate in sports and exercise groups, and older adults and senior citizens (aged 60 years and over) more likely to participate in arts and cultural groups and religious groups / places of Worship.

Communication

Preferred methods of interacting with / receiving information from Council

- More than four-fifths (82.4%) of respondents nominated at least one method by which they would prefer to interact with / receive information from Council, at an average of approximately two methods each. This reinforces the view that most respondents would like to interact with / receive some information from Council.
- Respondents from Skye (91.6%) were the most likely to nominate at least one method, whilst respondents from the rural precinct (73.7%) were the least likely.
- There was some variation in these results observed by age structure, with children (aged 5 to 12 years) (21.5%) and adolescents (aged 13 to 19 years) (24.5%) measurably less likely to nominate, and older adults (aged 60 to 74 years) (96.5%) more likely.

- The three most common methods by which they would prefer to interact with / receive information from Council were information in the local newspapers (32.95), the Council website (31.4%), and the *Frankston City News* (30.4%).

- There was variation in the preferred methods observed by age structure, with younger respondents more likely to prefer methods such as social media, SMS alerts, and the website, and older respondents more likely to prefer information in the local newspapers and the *Frankston City News*.

Education

- Almost one-quarter (24.0%) of respondents reported that they currently attend an educational institution:

  - Preschool / kinder (9.8%)
  - Primary school (19.6%)
  - Secondary school (31.8%)
  - TAFE or similar (16.0%)
  - University (18.1%)
  - Other (4.7%).

- These results will be impacted by the skew in the age structure of the sample towards older over younger respondents that resulted from the change in methodology due to COVID-19.

- There was variation in these results observed across the municipality, with respondents from Karingal (17.2%) more likely to be attending preschool / kindergarten; respondents from Frankston Heights (34.2%), Frankston North (34.8%), Frankston South (33.4%), and the rural precinct (53.5%) were more likely to be attending primary school; respondents from Langwarrin (46.9%) were more likely to be attending secondary school; and respondents from Seaford (29.4%) were more likely to be attending university.

- A little less than one-sixth (15.5%) of respondents reported that the educational opportunities available in Frankston were not suitable to their needs.

- Respondents from Sandhurst (28.6%) and the rural precinct (33.3%) were the most likely to report that the educational opportunities available in Frankston were not suitable for their needs.

- A little less than half (40.5%) of young adults (aged 20 to 34 years) reported that the educational opportunities available in Frankston were not suitable to their needs.

Qualifications

- Approximately one-quarter (26.2%) of respondents aged 15 years and over reported that they had a bachelor's degree or higher qualification and almost half (48.6%) had a certificate / diploma qualification, with 23.8% having no post-secondary school qualification.

- These results are different to the 2016 *Census* results, which reported 53.9% with no post-secondary school qualification. This variation in the results is likely to reflect the change in the methodology due to COVID-19 and the lack of personal interaction with residents both when delivering and pick-up the completed surveys.

- Respondents from Sandhurst (35.1%) and Frankston South (34.4%) were the most likely to have a bachelor or higher qualification, whilst respondents from Frankston North (44.5%) were the most likely to have no post-secondary school qualification

- Young adults (aged 20 to 34 years) (44.4%) and adults (aged 20 to 44 years) (38.6%) were the most likely to have a bachelor or higher qualification, whilst senior citizens (aged 75 years and over) (38.4%) were the most likely to have no post-secondary school qualification.

- Multi-lingual respondents (44.0%) were significantly more likely to have a bachelor or higher qualification than English-speaking respondents (24.3%).

Employment

Current employment status

- A little more than half (57.5%) of respondents aged 15 years and over were in the labourforce, with 30.5% employed full time.

- Almost one-third (31.6%) of respondents aged 15 years and over were retired, reflecting the skew in the sample towards older over younger respondents from to the change in the methodology due to COVID-19.

- Just 6.8% of respondents aged 15 years and over were engaged in study.

- 3.5% of respondents aged 15 years and over were unemployed, with 5.4% of young adults (aged 20 to 34 years) and 5.3% of middle-aged adults (aged 45 to 59 years) unemployed.

- There was some variation in these results observed across the municipality, with respondents from Skye (46.5%) more likely than average to be employed full-time; respondents from Frankston South (10.4%) and the rural precinct (12.1%) more likely to be self-employed; respondents from Karingal (47.0%) more likely to be retired; and respondents from Frankston North)11.6%) more likely to be unemployed.

- As expected, there was significant variation in these results observed by age structure, with young adults (aged 20 to 34 years) (51.6%) and adults (aged 35 to 44 years) (58.4%) the most likely to be employed full-time.

- Male respondents (42.9%) were more likely than female respondents (19.4%) to be employed full-time, whilst female respondents were more likely to be employed part-time (15.8%), casually employed (5.7%), and engaged in home duties (5.8%).

Satisfaction with current employment status

- 11.3% of respondents were not satisfied with their current employment status. Excluding retired respondents, 12.3% were not satisfied with their current employment status, including 8.8% of employed respondents and 67.7% of unemployed respondents.

- Respondents from Frankston North were the least likely to be satisfied with their current employment status.

- Whilst there was relatively little variation in these results observed by age, gender, or language spoken at home, it is noted that respondents with a disability (18.0%) were less likely to be satisfied with their current employment status than other respondents (10.4%).

Occupation

- The occupation profile of *Household Survey* respondents differed to the 2016 *Census* in that it over-represented professionals (24.0% compared to 16.4%) and under-represented sales workers (8.2% compared to 11.2%), machinery operators / drivers (3.9% compared to 6.9%), and labourers and related workers (5.8% compared to 9.9%).

- The variation in the results between the *Household Survey* and the *Census* is, at least in part, a result of the change in the methodology due to the COVID-19 lockdown and the lack of personal interaction with residents both when dropping off and when picking up the completed survey.

- There was some variation in these results observed across the municipality, with respondents from Frankston Central more likely to be employed as professionals (38.5%); Frankston North respondents more likely to be employed as sales workers (13.2%) and labourers and related workers (18.4%); Karingal respondents more likely to be employed as labourers and related workers (10.0%); Langwarrin respondents more likely to be employed as sales workers (14.1%); Sandhurst respondents more likely to be employed as managers (19.7%); Skye respondents more likely to be employed as machinery operators / drivers (8.0%); and the rural precinct respondents more likely to be employed as community / personal service workers (20.0%).

- Male respondents were more likely to be employed as managers (11.8%), technicians and tradespersons (26.9%), and machinery operators and drivers (6.7%); whilst female respondents were more likely to be employed as professionals (29.0%), community / personal service workers (19.2%), and clerical / administration workers (21.9%).

Industry of employment

- The industry of employment profile of the Household Survey respondents differed to the 2016 *Census* in that it over-represented healthcare and social assistance (21.3% compared to 4.2%) and education and training (10.1% compared to 4.0%), and under-represented construction (12.4% compared to 20.4%) and manufacturing (6.3% compared to 13.7%).

- The variation in the results between the *Household Survey* and the *Census* is, at least in part, a result of the change in the methodology due to the COVID-19 lockdown and the lack of personal interaction with residents both when dropping off and when picking up the completed survey.

- Male respondents were more likely to be employed in construction (21.3%) and manufacturing (8.8%), whilst female respondents were more likely to be employed in healthcare and social assistance (35.7%) and education and training (14.9%).

Employment location

- More than one-quarter (28.2%) of employed respondents were employed in the City of Frankston, 15.8% were employed in the southeastern Melbourne region, 12.6% were employed in the Mornington Peninsula region, 11.3% were employed in the inner Melbourne region, and 11.0% were employed in various locations.

- The most common suburbs of employment were Frankston (15.0%), various locations (11.0%), Dandenong (7.8%), and Melbourne CBD (7.5%).

- Male respondents were more likely to be employed in southeastern Melbourne (17.7%), inner Melbourne (14.8%), various locations (15.4%), and inner eastern Melbourne (9.1%), whilst female respondents were more likely to be employed in the City of Frankston (37.0%) and the Mornington Peninsula region (17.3%).

Working from home

- A little less than half (44.7%) of employed respondents reported that they work from home at least sometimes. This includes 5.3% working form a home-based business, 28.5% sometimes, 9.1% often, and 1.8% always working from home. 55.2% of employed respondents never work from home.

- Respondents from Frankston Central (59.8%), Frankston South (58.9%), and Sandhurst (56.9%) were the most likely to work from home at least sometimes, whilst respondents from Skye (29.1%), Karingal (31.7%), and Carrum Downs (31.5%) were the least likely.

- Female respondents (50.4%) were more likely to work from home at least sometimes than male respondents (39.0%).

Unemployment

- 48 respondents or 3.5% of the sample of 1,408 respondents aged 15 years and over were unemployed, including 6.5% of adolescents (aged 15 to 19 years), 5.4% of young adults (aged 20 to 34 years), and 5.3% of middle-aged adults (aged 45 to 59 years).

- Respondents from Frankston North (11.6%) were the most likely to be unemployed, whilst respondents from Frankston Heights (0.8%) and Karingal (0.0%) were the least likely.

- One-fifth (19.4%) of unemployed respondents had been unemployed for less than one month, whilst 41.9% had been unemployed for one year or more.

- Unemployed respondents were most likely to prefer permanent part-time employment (35.5%), entry level full-time employment (16.1%), or experienced full-time employment (16.1%).

- The main barriers to finding employment include a lack of local employment opportunities, mental and physical health, age, and a lack of experience.

Transport

Transport to work or study

- The overwhelming majority (83.0%) of employed respondents travelled to work by car as a driver, with a further 3.8% travelling to work by car as a passenger.

- A little less than 10% (8.8%) travelled to work by public transport, including multi-modal trips.

- There was some variation in this result based on where respondents worked:

  - *Working in the City of Frankston* - 6.8% of respondents worked from home and 4.9% walked to work.

  - *Working in the inner Melbourne region* – 25% travelled to work by train and 20.6% travelled to work by car and public transport (multi-modal e.g., driving to train station).

- A little less than three-quarters (72.4%) of respondents attending an educational institution travelled to study by car, either as a driver (48.1%) or by car as a passenger (24.3%).

- There was significant variation in this result based on the type of educational institution attended:

  - *Primary school students* – were more likely to be driven to school by car (70.8%).

  - *Secondary school students* – were more likely to be driven to school by car (40.4%), or to walk to school (14.3%).

  - *TAFE and similar students* – were more likely than average to drive to TAFE (83.5%).

  - *University students* – were more likely to drive to university (69.4%), but they were more likely than TAFE students to travel to study by car and public transport (e.g., drive / dropped at the train station) (11.9%).

Public transport

- A little less than half (47.8%) of respondents reported that they used public transport at least sometimes, with 9.8% using it frequently (at least once a week), 6.3% using it at least monthly, and 31.6% using it less than monthly.

- Respondents from Seaford (67.5%) were the most likely and respondents from the rural precinct (21.8%) were the least likely to use public transport.

- There was some variation in these results observed by age structure, with adolescents (aged 13 to 19 years) being significantly more likely than average to use public transport (71.6% compared to 47.7%), and young children (aged 0 to 4 years) significantly less likely to use public transport (25.6%).

- Adolescents (aged 13 to 19 years) (43.9%) were the most likely to frequently use public transport.

- Approximately one-quarter (26.1%) of respondents nominated at least one factor that might encourage additional public transport use. This highlights the fact that for most respondents, there was nothing that would immediately come to mind that might encourage additional public transport use. This is an important finding highlighting the difficulty of increasing public transport use.

- A wide range of factors were outlined by respondents, with free / lower cost fares (3.8%), more / better safety and security (3.5%), and more convenient / easier / closer public transport (2.9%) the most common types of responses.

Cycling

- A little less than half (42.6%) of respondents reported that they own a bicycle.
- Respondents in the rural precinct (52.3%) were the most likely to own a bicycle, whilst respondents in Frankston North (27.4%) were the least likely.
- This municipal result was influenced by the skew in the sample towards older over younger respondents that resulted from the change in methodology in response to COVID-19.
- There was significant variation in this result observed by age structure, with 91.3% of children (aged 5 to 12 years) owning a bicycle, compared to just 14.6% of senior citizens (aged 75 years and over).
- Male respondents (50.3%) were more likely to own a bicycle than female respondents (35.1%).
- English-speaking respondents (43.3%) were more likely than multi-lingual respondents (36.0%) to own a bicycle.
- A little less than one-quarter (23.0%) of bicycle-owning respondents frequently (at least weekly), 57.9% occasionally, and 19.1% never use their bicycle.
- Respondents from Seaford (94.7%) were the most likely to use their bicycle at least occasionally, whilst respondents from Langwarrin (68.3%) were the least likely.
- Apart from young children (aged 0 to 4 years) (64.35) and children (aged 0 to 12 years) (51.9%), who were significantly more likely to frequently use their bicycle, there was relatively little significant variation observed by age structure, gender, or language spoken at home.
- Approximately one-quarter (27.2%) of respondents nominated at least one factor that might encourage additional cycling. This highlights the fact that for most respondents, there was nothing that would immediately come to mind that might encourage additional cycling.
- A wide range of factors were outlined by respondents that might encourage additional cycling, with more / better dedicated bike tracks (8.0%), access to / ownership of / a better bike (3.0%), good weather (2.9%), and more time / fewer work hours / better work-life balance (2.8%) were the top three types of responses.

Number of motor vehicles

- The average respondent household had 1.9 motor vehicles usually garaged at or parked near their dwelling, with 1.75 cars parked on the property and 0.18 parked on the street.
- 6.1% of respondent households did not have a private motor vehicle, with 7.7% had four or more vehicles.

- Respondent households in the rural precinct (2.72) had the largest average number of motor vehicles, whilst respondent households in Frankston North (1.23) had the least.

Ease of getting to surrounding suburbs by different forms of transport

- Respondents were asked how easy it was to travel to surrounding suburbs by different types of transport. On average:
    - *Car* - respondent households found it "extremely easy" by car, with an average ease of 9.24 out of 10, whilst just two percent found it "difficult".
    - *Bus* – respondent households found it "moderately easy" by bus, with an average ease of 6.50 out of 10, whilst 21.5% found it "difficult".
    - Walk, bicycle, train – respondent households found it "mildly easy" by walking (5.77), bicycle (5.71), or train (5.52), whilst approximately one-third found it "difficult".
- Respondents from Frankston North (8.66) found it much easier to travel by bus than average, whilst respondents from the rural precinct (3.57) found it much more difficult.
- Respondents from Seaford found it easier to walk (7.22) or cycle (7.27) than average, whilst respondents from the rural precinct (2.68 and 3.17) found it much more difficult. Older respondents found it more difficult to cycle than younger respondents.
- Respondents from Seaford (7.84), Frankston Central (7.20), and Frankston North (7.03) found it easier than average to travel by train, whilst respondents from Sandhurst (3.16) and the rural precinct (3.03) found it more difficult.
- The most common reasons why respondents found it difficult to travel to surrounding suburbs by any of the four forms of transport were that distances were too far (21.2%), lack of / poor accessibility to public transport (15.1%), and poor public transport routes / timetables / network / frequency (13.7%).

Major transport infrastructure improvements

- Almost four-fifths (79.1%) of respondent households nominated at least one of the eight (including "other") major transport infrastructure improvements that were important to them.
- The top four major transport infrastructure improvements were more / better commuter car parking at train stations (59.8%), more express trains on the Frankston line (50.6%), bus timetables more aligned to train timetables (41.6%), and more frequent train services on the Frankston line (35.5%).
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- There was significant variation in these results observed across the 11 precincts, including:
    - *Bus timetables more aligned to train timetables* – was more important to respondent households from Karingal (52.6%).
    - *More frequent train services on the Frankston line* – was more important than average to respondent households from Carrum Downs (42.0%) and Sandhurst (44.6%).
    - *Electrification of the Frankston line to Langwarrin South* – was more important than average to respondent households from Langwarrin (60.6%) and the rural precinct (38.5%).
    - *Electrification of the Frankston line to Baxter* – was more important than average to respondent households from Frankston Heights (39.1%), Frankston South (32.9%), and the rural precinct (46.2%).
    - *Electrification of the Frankston line to Leawarra* – was more important than average to respondent households from Frankston Heights (29.7%), Karingal (228%), and Langwarrin (24.2%.

Housing

Dwelling type (current and preferred)

- The *Household Survey* respondents were more likely to live in a separate detached house than the 2016 *Census* (90.9% compared to 79.2%).
- Respondents from Frankston Central (23.7%), Seaford (19.0%) and Frankston North (10.6%) were more likely than average to live in non-separate house dwellings (including townhouses, flats, units, and apartments).
- Most respondents both currently live in a separate detached house (90.9%) and prefer to live in a separate detached house (93.9%), regardless of household structure or income.
- For those living in medium or higher density housing, approximately half preferred to live in a separate detached house.

Number of bedrooms

- Most respondents currently live in a three (49.5%) or a four-bedroom (34.6%) dwelling, and most prefer to live in a three-bedroom (37.4%) or four-bedroom (43.4%) dwelling.

- The most preferred types of dwellings were a four-bedroom (42.9%), or three-bedroom (35.0%) separate detached house.

- When broken down by the number of persons living in the dwelling, it is found that:

  - *One-person household* – 24% currently live in a bedsit, one- or two-bedroom dwelling, and 75% prefer to live in a three- or more bedroom dwelling.

  - *Two-person household* – 53% currently live in a three-bedroom dwelling, and 50% prefer to live in a four- or more bedroom dwelling.

  - *Three-person household* – 51% currently live in a three-bedroom dwelling and 70% prefer to live in a four- or more bedroom dwelling.

Importance of selected aspects in the choice to live in the current dwelling

- Respondent households were asked to rate how important each of 14 aspects were to them when choosing to live in their current dwelling.

- On average, respondent households reported the following results:

  - *Extremely important* – the type of dwelling (9.03), safety / security (9.02), affordability (8.84), space for car parking on the property (8.80), size of private open space (8.68), the number of bedrooms (8.51), the size of dwelling (8.40), and the level of upkeep / maintenance required (8.17).

  - *Very important* – the energy and water efficiency (7.88), suitability for children (7.15), and architectural style (7.02).

  - *Moderately important* – the space for car parking on the street (6.77) and suitability for frail / elderly / persons with a disability (6.22).

  - *Mildly important* – the ability to work from home (5.80).

- There was some variation in these results observed by precinct, household structure, household income, disability status, and language spoken at home, with detailed results provided in the main report, and it is noted that:

  - *Rural precinct* - respondents tended to have a different set of results than respondents in the urban precincts.

  - *Families with children* – tended to rate as more important the size related aspects, such as size of dwelling, size of private open space, number of bedrooms, car parking, and similar aspects.

  - *Younger sole persons* – tended to rate many aspects as less important than other household structures.

Housing situation

- Consistent with the skew in the sample towards older over younger respondents that resulted from the change in methodology due to COVID-19, the respondents to the *Household Survey* were more likely to own their home outright than the results from the 2016 Census (49.8% compared to 27.2%).

- At least one-third of respondent households in each precinct owned their home outright.

- There was, however, significant variation observed:

    - *Homeowners* - respondents from Frankston South (57.5%), Karingal (54.7%), Langwarrin (55.9%), Sandhurst (56.3%), and the rural precinct (57.9%), and two-parent families with adult children only (56.7%), older sole person (75.4%) and older couples (88.2%) were more likely to own their home outright.

    - *Mortgagors* - respondents from Carrum Downs (54.7%) and Skye (46.4%), two-parent families with children under 18 years (average of 73.3%), younger (75.6%) and middle-aged sole person (49.8%), and younger (80.0%) and middle-aged (56.2%) couple households were more likely to have a mortgagee.

    - *Rental* - respondents from Frankston Central (18.9%), Frankston Heights (19.0%), Frankston North (20.0%), and Seaford (18.0%), as well as one-parent families (average of 44.7%) and group households (34.9%) were more likely to be renting.

Housing payments

- The median weekly housing cost of respondent households with a mortgage or renting was $399 per week.

- When compared to the 2016 *Census*:

    - *Mortgage payment* – the median monthly mortgage payment from the survey was $1,880 per month compared to $1,621 from the *Census*, an increase of 16% over five years.

    - *Rental payment* – the median weekly rental payment from the survey was $352 per week, compared to $306 from the *Census*, an increase of 15% over five years.

Potential migration

- A little more than one-tenth (12.7%) of respondents reported that they definitely (4.1%) or potentially (8.6%) move from their current address within the next 12 months.

- Respondents from Karingal (22.9%) were the most likely to potentially move, whilst respondents from Skye (6.7%) and Frankston South (5.4%) were the least likely.

- There was significant variation in this result observed by age structure, with adolescents (aged 13 to 18 years) (47.9%) the most likely to potentially move, and young children (aged 0 to 4 years) and senior citizens (aged 75 years and over) the least likely (with none reporting that they may potentially move).

- Almost half (44.6%) of respondents potentially moving in the next 12 months were most likely to stay in the southeastern region of Melbourne, either in the City of Frankston (32.3%) or the surrounding southeastern region of Melbourne (11.3%). A further 18.2% were most likely to move to the Mornington Peninsula region.

- The most common reasons why respondents may potentially move within the next 12 months were lifestyle changes (9.6%) and upgrading (9.0%).

- There was some variation by age structure, with:

    - *Younger (aged under 35 years)* - more likely to move due to upgrading, better access to services, purchasing a new home, building a home, or to be a child leaving home.

    - *Middle-aged (aged 35 to 59 year)* – more likely to be moving due to renting.

    - Older (aged 60 years and over) – more likely to be downsizing, moving due to noisy neighbours, and more likely to be moving to a retirement or nursing home.

Community services

Children's and youth services

- The results for the current and potential future use of children's and youth services were impacted by the age skew of older over younger respondents in the survey which resulted from the change in the methodology due to COVID-19. A detailed breakdown of current and future demand for these services by age-related household structure is provided in the main report.

- The nine children's and youth services included in the survey were before and after school care, playgroups, 3-year-old kinder, 4-year-old kinder, school holiday programs, immunisation, Maternal and Child Health services, youth activities and services, and preschool storytime.

- Approximately one-sixth (16.5%) of respondent households reported that they currently used at least one of the nine listed children's and youth services and 16.9% may potentially require at least one in the next five years, however:

- *Two-parent families with children aged under 4 years* - 90.6% currently use at least one of these services, and 76.3% may potentially require at least one in the next five years.

- *One-parent families with children aged under 18 years* – 65.0% currently use at least one of these services, and 23.8% may potentially require at least one in the next five years.

- *Younger sole person and couples* – 71.7% and 75.5% respectively may require at least one of these services in the next five years.

- Just 2.2% of respondent households reported that they currently require but could not access locally at least one children's and youth services, with six household unable to access playgroups, 5 unable to access immunisation, and five unable to access youth activities and services.

Aged and disability services

- The results for the current and potential future use of aged and disability services were impacted by the age skew of older over younger respondents in the survey which resulted from the change in the methodology due to COVID-19. A detailed breakdown of current and future demand for these services by age-related household structure is provided in the main report.

- The seven aged and disability services included in the survey were home maintenance, allied health, in-home community care, community transport, senior citizens clubs, Meals on Wheels, and aged care housing.

- A little less than one-quarter (22.1%) of respondent households currently used at least one of these services, whilst 27.1% may potentially require at least one in the next five years, however:

  - *Extended families* - 26.7% currently require at least one service and 47.2% may potentially require at least one in the next five years.

  - *Older couples* – 30.9% currently require at least one service and 43.7% may potentially require at least one in the next five years.

  - *One-parent families with adult children only* – 30.3% currently require at least one service and 33.5% may potentially require at least one in the next five years.

  - *Older sole person households* – 37.0% currently require at least one service and 32.5% may potentially require at least one in the next five years.

  - Two-parent families with adult children only – 18.1% currently require at least one service and 27.8% may potentially require at least one in the next five years.

- 5.4% of respondent households reported that they currently require at least one of these aged and disability services but were unable to access locally, with 22 unable to access home maintenance, 16 unable to access allied health, and 11 unable to access in-home community care, senior citizens clubs, or Meals on Wheels.

Community support services

- The results for the current and potential future use of community support services were impacted by the age skew of older over younger respondents in the survey which resulted from the change in the methodology due to COVID-19. A detailed breakdown of current and future demand for these services by age-related household structure is provided in the main report.

- The 15 community support services included in the survey were bulk billing doctors, post-secondary school education, secondary schools, community centres / neighbourhood houses, parenting education programs, individual and family counselling, community legal service, community health centres, financial counselling, gambling counselling, social housing, programs for drug and alcohol addiction, emergency housing, women's refuge, and in patient drug and alcohol rehabilitation in hospital.

- Apart from bulk billing doctors, with which 55.7% of respondent households currently use, less than seven percent of respondent households currently use, or may potentially require any of the other 14 services within the next five years.

- Except for bulk billing doctors (55.7%), the proportion of respondent households that currently use and may potentially require each of these community support services was relatively consistent.

- One and two-parent families with children aged up to 18 years were the most likely to currently use at least one of these services (mostly bulk billing doctors), whilst older sole person and couple households were the least likely.

- Almost 10% (9.3%) of respondent households currently require but cannot access locally at least one of the 15 community support services, with 45 unable to access a bulk billing doctor and 11 unable to access individual and family counselling.

Local neighbourhood

Importance of selected aspects to living in the neighbourhood

- Respondent households were asked to rate how important each of 29 aspects of the neighbourhood were to them living in the neighbourhood, with the average importance as follows:

- *Extremely Important* – includes the safety and security of the local area (9.30), access to quality health care (9.09), close to local shops (8.67), sealed roads in the area (8.62), and the natural bushland setting (8.60). More than four-fifths of respondents rated these as "very important", whilst less than five percent rated them "unimportant".

- *Very Important* – includes the community feel of the area (8.39), close to nature reserves (8.35), access to passive recreation facilities (8.25), streetscapes / street trees (8.15), close to the foreshore / beach (8.11), the cost / affordability of housing (7.92), and close to good public transport (7.84). Approximately three-quarters of respondents rated these as "very important", whilst less than ten percent rated them as "unimportant".

- *Important* – includes the height of buildings in the area (7.78), the layout of the local streets (7.65), close to family / friends (7.62), homes having a front garden (7.47), wide grassed nature strips (7.25), country feel / semi-rural lifestyle (7.17), views to the bay / foreshore (7.12), views to rural landscapes / vistas (6.97), and the front and side building setbacks (6.95). More than half, up to two-thirds of respondents rated these as "very important", whilst between approximately ten to 14% rated them unimportant.

- *Moderately Important* – includes quality schools (6.92), access to active sporting facilities (6.78), the treatment of front fences (6.77), and the types of home building materials (6.77). Approximately half of the respondents rated these as "very important", whilst approximately one-sixth to one-fifth rated them "unimportant".

- *Mildly Important* – includes close to university, TAFE, or similar (6.08), diversity of housing choices (6.06), consistent design / style of housing (5.80), and heritage values (5.69). A little more than one-third of respondents rated these as "very important", whilst approximately one-quarter rated them "unimportant".

- There was substantial variation in these average importance scores for the various aspects of the local neighbourhood observed by household structure. Households at different stages of their lifecycle tend to report different priorities when it comes to living in their local neighbourhood. For example:

  - The importance of *the cost / affordability of housing* varied substantially, with younger couples (8.68) who were potentially looking at starting new families rating it significantly more important than older couples (7.72) who were more likely to own their home and be enjoying rising housing prices.

  - The importance of *quality of schools in the local area* varied substantially. Two-parent families with children aged under 5 years (9.76) and children aged 5 to 12 years (9.09) rated it extremely importance, whilst older sole person (5.75) and couple households (5.78) rated it only marginally important.

- There were a range of other aspects of importance to respondents, with a preference for less housing development, particularly higher density (7.4%), more trees, particularly native (5.1%), and less traffic / better traffic management (4.4%) the most common suggestions.

Development in Frankston

Housing development in Frankston

- Respondent households were asked to rate their agreement with 12 statements about housing development in Frankston, with the average agreement as follows:

    - *Very Strong Agreement* – that I / we believe we will be able to stay in Frankston as we age (7.99). Almost three-quarters of respondent households strongly agreed with this statement, whilst 7.2% of respondent households disagreed.

    - *Strong Agreement* – that Frankston needs accommodation suited to older residents / households (7.22) and new housing should be located near public transport and services (7.17). More than half of the respondent households strongly agreed with these statements, whilst approximately ten percent disagreed.

    - *Moderate Agreement* – that there is a good choice of housing types in Frankston to suit my / our current and future needs (6.84), unit developments are good if built in the right / appropriate locations (6.62), there is a diversity of housing opportunities in Frankston to meet a diversity of housing needs (6.39), and there is a good range of existing block sizes that allow different types of residential experiences in Frankston (6.23). Between 40% and 50% of respondents strongly agreed with these statements, whilst between 10% and 20% disagreed.

    - *Mild Agreement* – that housing is affordable in Frankston City (5.67) and I know of people who are struggling to pay their rent or mortgage in Frankston (5.47). Approximately one-third of respondents strongly agreed with this statement, whilst a similar proportion disagreed.

    - *Mild Disagreement* – that first home buyers can afford housing in my neighbourhood (4.35). Almost one-fifth of respondents strongly agreed with this statement, whilst almost half disagreed.

    - *Moderate Disagreement* – that I know somewhat who has been homeless and struggled to find housing (3.46) and the Frankston City Centre would be more vibrant if there were more apartments (3.39). Between one-sixth and one-fifth of respondents strongly agreed with these statements, whilst a little less than two-thirds "disagreed".

- There was substantial variation in these average agreement scores observed across the municipality and particularly by household structure. Households at different stages of their lifecycle tend to have somewhat different views in relation to housing and development issues. For example:

    - Agreement that *the Frankston City Centre would be more vibrant if there were more apartments* varied a little by household structure. Two-parent families with children aged under 5 years (2.48) and younger couples (1.77) reported the strongest level of disagreement.

- Agreement that *unit developments are good if built in the right / appropriate locations* varied significantly by household structure. Group households (8.34), older sole persons (7.22), and two-parent families with adult children only (7.28) were most strongly in agreement, whilst younger couples (5.72) and two-parent families with children aged under 5 years (5.31) were only very marginally in agreement.

Improvements to Frankston City

- Respondent households were asked to rate how important it was that 20 improvements be made to the Frankston City Centre, with the average importance as follows:

  - *Extremely Important* – green spaces to sit and enjoy (8.74), improved safety (lighting, visibility) (8.70), improved parking accessibility (8.68), and cleaner shopfronts (8.58). Four-fifths or more of respondents rated these very important, whilst approximately two percent rated them unimportant.

  - *Very Important* – fewer vacant shops (8.44), diversity of restaurants / cafes (8.41), quality outdoor dining experiences (8.13), more employment in the city (8.13), and building heights that respect the foreshore and Kananook Creek (8.02). Approximately three-quarters of respondents rated these very important, whilst approximately five percent rated them unimportant.

  - *Important* – improved appearance of Nepean Highway buildings and landscaping (7.80), more / better festivals and events (7.33), safe bike riding paths to and within the city centre (7.31), and more leisure activities on the waterfront (7.28). Approximately two-thirds of respondents rated these very important, whilst approximately ten percent rated them unimportant.

  - *Moderately Important* – night-time activities (6.92), community services (6.32), collaboration and learning spaces for start-up businesses (6.22), and more street art (6.02). Between one-third and half of the respondents rated these very important, whilst between one-sixth and one-fifth rated them unimportant.

  - *Moderately Unimportant* – more apartments in the city centre (3.92). One-sixth of respondents rated this very important, whilst approximately half rated it unimportant.

- There was substantial variation in these average importance scores observed by household structure. For example:

  - The importance of *more apartments in the city centre* varied substantially although all household structures on average rated this unimportant. Middle-aged sole person households (4.79) were less likely to disagree with this than younger couples (3.15) and two-parent families with children aged under 5 years (2.89).

- 211 respondent households nominated at least one other idea about how to improve the Frankston City Centre, with the most common suggestions being more / free parking (5.4%) and better safety / security / policing (5.1%).

Retail trade

- Respondent households were asked where their household currently shops most often for five types of shopping: daily shopping needs, regularly grocery shopping, clothing and other comparison goods shopping, larger household goods, and dining out and entertainment. The top five centres for each type of shopping were as follows:

    - *Daily shopping needs* – were Karingal Hub (16.9%), Carrum Downs Shopping Centre (16.3%), The Gateway Langwarrin (11.5%), Bayside Shopping Centre (11.4%), and Towerhill Shops (10.9%).

    - *Regular grocery shopping* – were Karingal Hub (28.7%), Bayside Shopping Centre (25.3%), Carrum Downs Shopping Centre (19.3%), The Gateway Langwarrin (14.3%), and Carrum Downs Plaza (13.6%).

    - *Clothing and other comparison goods shopping* – were Bayside Shopping Centre (54.3%), Karingal Hub (34.9%), Southland Shopping Centre (24.1%), Frankston Power Centre (19.9%), and Main Street Mornington (17.8%).

    - *Larger household goods shopping* – were Frankston Power Centre (57.0%), Bayside Shopping Centre (13.9%), Frankston City Centre (11.2%), Karingal Hub (6.0%), and Southland Shopping Centre (5.3%).

    - *Dining out and entertainment* – were Main Street Mornington (31.5%), Frankston City Centre (27.3%), Bayside Shopping Centre (15.1%), Karingal Hub (14.1%), Melbourne CBD (13.5%), and Mt. Eliza Village (11.9%).

- There was significant variation in these results observed across the precincts comprising the City of Frankston.

Environment and sustainability

Environmental actions and initiatives

- Respondent households were asked whether they were already doing, considering doing within 12 months, or not considering doing each of 16 actions or initiatives that have a positive impact on the environment, as follows:

    - *Installed energy efficient lights* – 80.7% doing, 5.2% considering, 4.2% not considering.

    - *Use water efficient showerheads* – 65.4% doing, 6.3% considering, 13.8% not considering.

    - *Have a low water use garden* – 58.1% doing, 10.5% considering, 15.1% not considering.

- *Purchase sustainable products* – 53.2% doing, 13.1% considering, 13.45 not considering.
- *Install insulation batts* – 52.0% doing, 4.6% considering, 14.3% not considering.
- *Reduce heat transfer from windows* – 49.9% doing, 14.1% considering, 17.6% not considering.
- *Install draught proofing* – 43.0% doing, 12.4% considering, 19.9% not considering.
- *Grow fruit and vegetables* – 42.4% doing, 14.7% considering, 26.2% not considering.
- *Buy organic and/or local produce* – 41.9% doing, 14.3% considering, 22.5% not considering.
- *Use rainwater tanks* – 39.5% doing, 9.9% considering, 31.4% not considering.
- *Compost or worm farm* – 34.5% doing, 9.2% considering, 33.8% not considering.
- *Limit use of vehicles by walking, cycling, or public transport* – 30.2% doing, 10.2% considering, 39.7% not considering.
- *Install solar power* – 27.8% doing, 16.1% considering, 32.6% not considering.
- *Purchase an electric bike / scooter* – 2.8% doing, 6.9% considering, 65.7% not considering.
- *Purchase / lease an electric vehicle* – 1.9% doing, 9.2% considering, 62.5% not considering.
- *Installed electric charger for vehicle at home* – 1.0% doing, 4.6% considering, 66.1% not considering.

- The report provides a breakdown of these results by precinct, household structure, dwelling type, household income, language spoken at home, and household disability status. Significant variation was observed for some of these environmental actions and readers are referred to the main report for more details.

Preparedness to cope with extreme weather

- On average, respondent households rated their preparedness to cope with extreme weather (e.g., extreme heat, flooding, bushfire) at 7.13 out of 10, with 53.9% reporting that they were "very prepared" and 8.9% reporting that they were "unprepared".

- Respondent households from the rural precinct were the most prepared, with an average preparedness score of 8.44, whilst those from Frankston North were the least prepared with a score of 6.26.

- Younger couples (5.38) and one parent families with children aged under 19 years (5.25) were the least prepared.

Heating and cooling

- Almost half (47.5%) of respondent households reported that there were times in the last year when they "needed to use their heating or cooling, but chose to go without to save money", with 30.5% reporting they had done so a few times and 17.0% reporting they had done so once.

- Respondent households from Carrum Downs (68.3%) and Frankston North (56.6%) were the most likely to have not used their heating or cooling when required to save money, whilst respondent households from Sandhurst (30.2%) were the least likely.

- One-parent families with children aged under 19 years (77.2%), younger couples (73.3%), and older sole person households (62.7%) were the most likely to have not used their heating or cooling when required to save money.

Rural land

Own or live on rural land in the Frankston City Council area

- 3.5% of respondent households reported that they own or live on a rural property located in the Frankston City Council area.

Agribusiness

- 9.5% of the respondent households who own or live on rural land in the municipality reported that they were undertaking an agribusiness on their land.

Land management practices

- Respondent households that own or live on rural land in the municipality were asked if they were undertaking any of seven land management practices, with repairing soil erosion (52.2%), fire preparedness (39.1%), and protecting native vegetation (34.8%) the three most undertaken.