

Milton-Ulladulla Structure Plan Review

Initial Community Survey: August-
September 2021: **Feedback Summary**

Published May 2022



Contents

Background	1
Survey Results - Key Highlights.....	2
Detailed Analysis	3
Age Profile of Survey Participants	3
Current Residence of Survey Respondents.....	4
Current Housing Type	5
Housing Demand.....	6
Perceptions of Housing Affordability	9
Community Values	10
Future Engagement Activities.....	14
Next Steps.....	14

Background

During August and September 2021, Council invited the community to participate in an online survey to inform our review of the Milton Ulladulla Structure Plan (MUSP). The purpose of the survey was to gain an understanding of housing demand and preferences within the Study Area (Figure 1) to help us better understand how people live now, and also how and where they would like to be living in the future.

We sought your feedback on:

- Your current home (household size, type, location, and suitability).
- Your desired future home (type and location).
- The future housing needs of your family members.
- Your experiences with housing affordability.
- Values relating to rural, scenic, and environmental land, and built form within the Ulladulla Town Centre.

We received over 270 survey responses via the project webpage. This feedback is being used to help inform the update of the MUSP to help us determine where and how growth should occur within the Study Area over the next 25-30 years.



Figure 1: Milton Ulladulla Structure Plan Study Area, outlined in red.

Survey Results - Key Highlights



85% of survey respondents live in the MUSP area.



Most respondents live in a single detached house.

91% of respondents aged 60+ live in a single detached house. 95% of these households are either two-persons or lone person households.



Most respondents indicated that their current home meets their needs.



Taken together, the findings indicate that housing stock considered suitable for larger families is being occupied by smaller households, suggesting a reduced desire and/or ability for people to downsize to smaller homes.



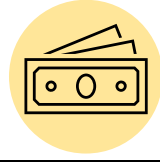
Younger age groups (<35 years) are more likely to move house over the next 10 years, while the majority of people aged over 35 intend to stay in their current home.



Of those people who intend to move, nearly two thirds would prefer to remain in the study area, favouring mainly beachside or rural surroundings.



Of those people who intend to move, respondents aged under 60 would prefer a single detached house, while those aged over 60 indicated a desire for more diverse housing options (units, townhouses, and the like).



Affordability is a major concern, especially for younger age groups attempting to enter the housing market.



There is more support for the development of land with ocean and mountain views than for development of farmland or land with scenic and/or high biodiversity values.



All age groups were generally supportive of townhouse style development in the Ulladulla Town Centre. However, there was less support for higher densities in the form of apartment buildings, particularly buildings taller than 4 storeys.

Detailed Analysis

Age Profile of Survey Participants

- 57% percent of all survey participants were aged between 60-84 (Figure 2).
- Interestingly, this age structure is similar for survey participants who live within the Study Area, although the proportion of responses received from people aged 35-49 was slightly higher (Figure 3).
- There were no survey participants under the age of 18.

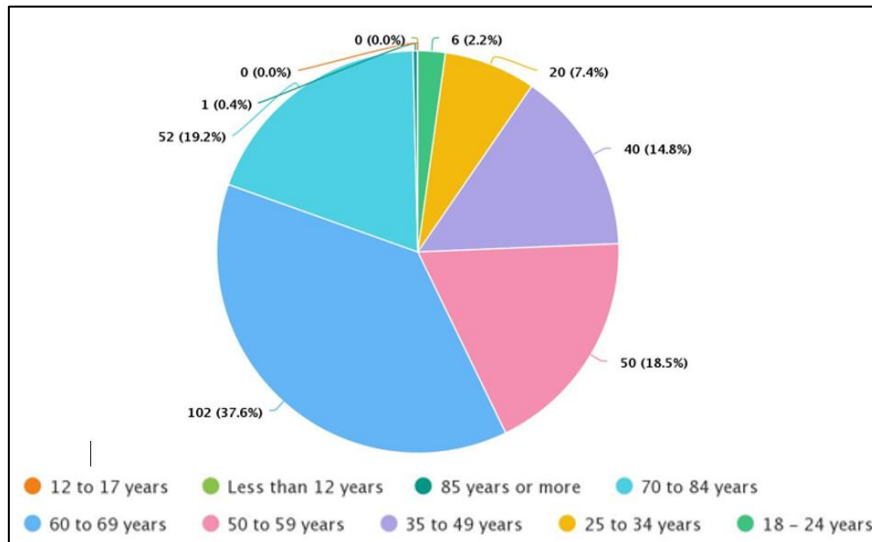


Figure 2: Age structure of all survey participants.

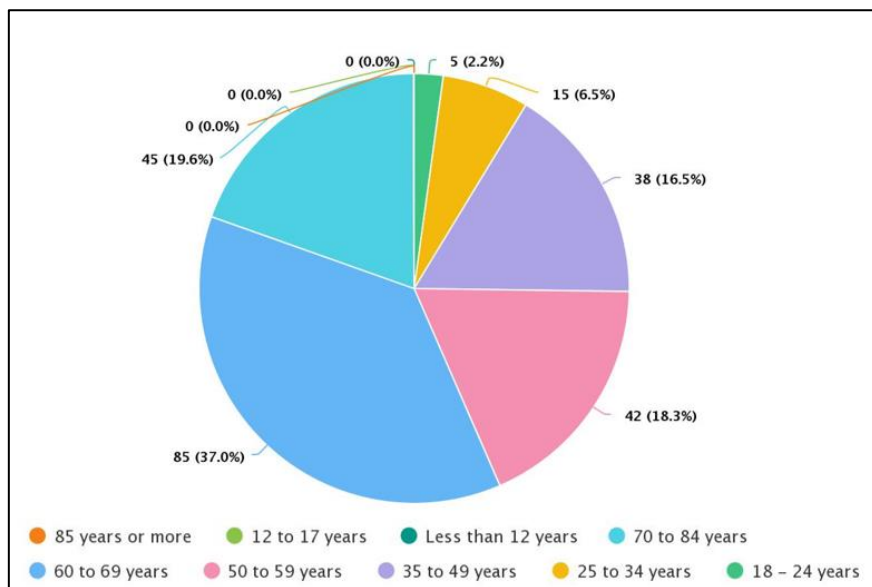


Figure 3: Age structure of survey participants who live within the Study Area.

- Despite accounting for 57% of survey responses, people in 60-84 age group only represent about one third of the population within the Study Area.
- The following chart (Figure 4) indicates an over-representation in the survey of people aged 60-69, and an under-representation of younger age cohorts and people aged 85+.

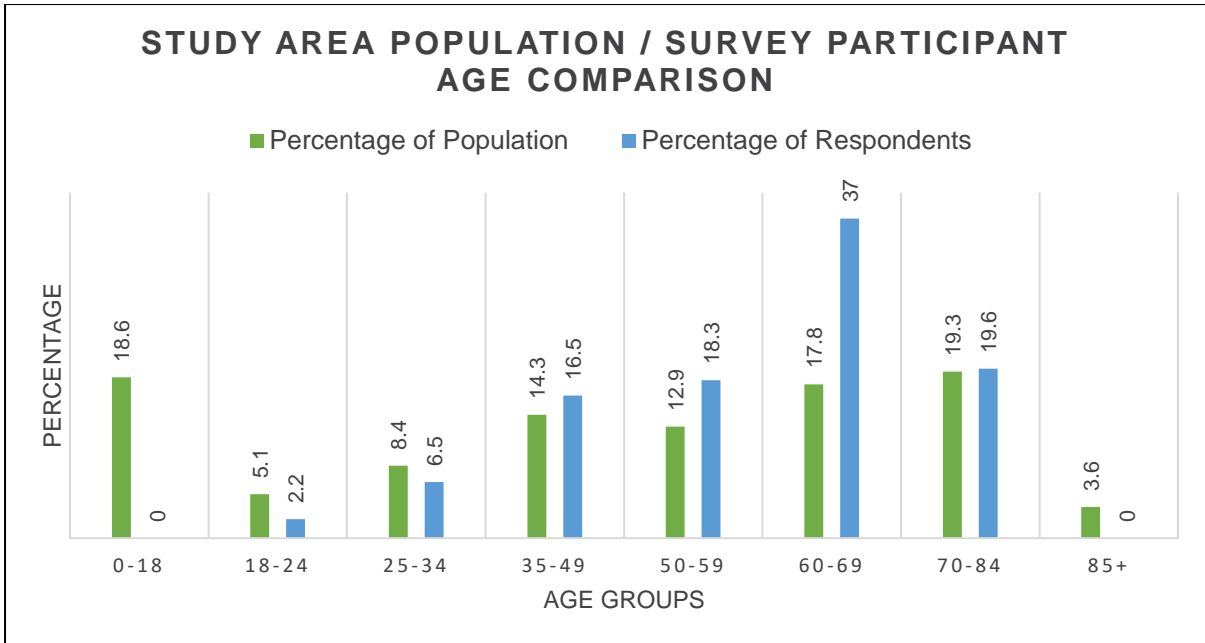


Figure 4: Comparison between age groups within the Study Area and the ages of survey participants.

These results suggest that future engagement activities need to consider ways to better engage with younger cohorts and people aged over 85.

Current Residence of Survey Respondents

We asked survey participants to tell us where they currently live, to gain an understanding of people’s interest in this project and to find out more information about current housing needs in the Study Area.

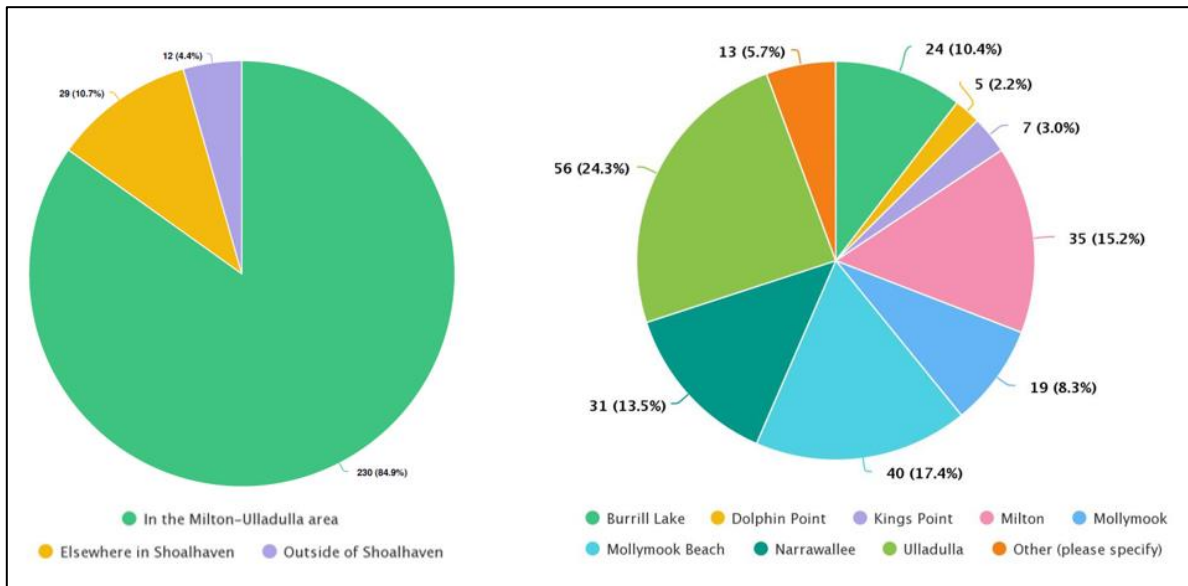


Figure 5: Survey participants’ place of residence.

- 85% of respondents live within the Study Area (Figure 5, left).

- For residents of the Study Area, the response rate was fairly evenly distributed across localities, although there were noticeably fewer survey responses from residents of Kings Point and Dolphin Point (Figure 5, right).
- Of the people who live outside the Study Area, but within Shoalhaven, 86% live in the southern Shoalhaven.
- Of the people who live outside Shoalhaven, connections to the Study Area include visitation, property ownership, and work and/or managing a business.

These results highlight the importance of the Milton-Ulladulla area as a regional service centre.

The results also indicate that a broad range of residents are interested in the future development of the Study Area.

Current Housing Type

We asked residents of the Study Area and broader Shoalhaven a series of questions about their current home, and whether they considered it to be suitable for their needs. A summary of housing types, grouped by age cohort, is provided in the graph below.

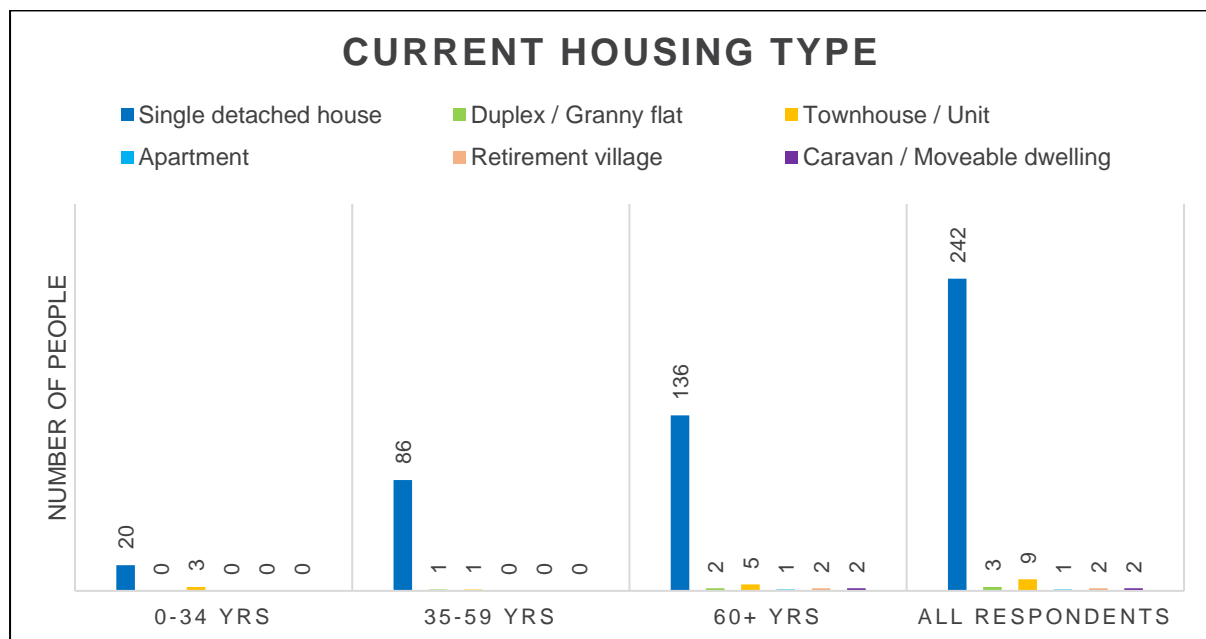


Figure 6: Current housing type of residents within the Study Area and broader Shoalhaven.

- 93% of all survey participants who live in Shoalhaven and the Study Area live in single detached homes.
- At the Study Area level, 85% of respondents live in single detached homes.
- 95% of respondents told us that their current home meets the needs of their household.

- 5% of people said their home didn't meet the current needs of their household. Reasons were varied, and included:
 - Inappropriate size (either too small or too large)
 - Cost (too expensive)
 - Poor build quality / thermal inefficiencies
 - Ongoing maintenance difficulties
 - Uncertainties around current rental market conditions.
- 98% of respondents over the age of 60 confirmed that their current home met the needs of their household.
- 91% of respondents over the age of 60 live in a single detached home. Of these people, 95% live in households that are either two-person or lone-person households.
- Taken together, the findings indicate the occupation of housing stock suitable for larger families (i.e. single detached homes) by smaller households, suggesting reduced desire and/or ability to downsize to smaller homes.

Housing Demand

We asked survey participants to consider how and where they would like to be living 10 years from now, to gain an understanding of potential future housing demand. These questions also encouraged people to think about the type of home they may need in the future.

Survey participants who live within Shoalhaven and the Study Area were asked whether they thought they would be living in their current home in 10 years' time.

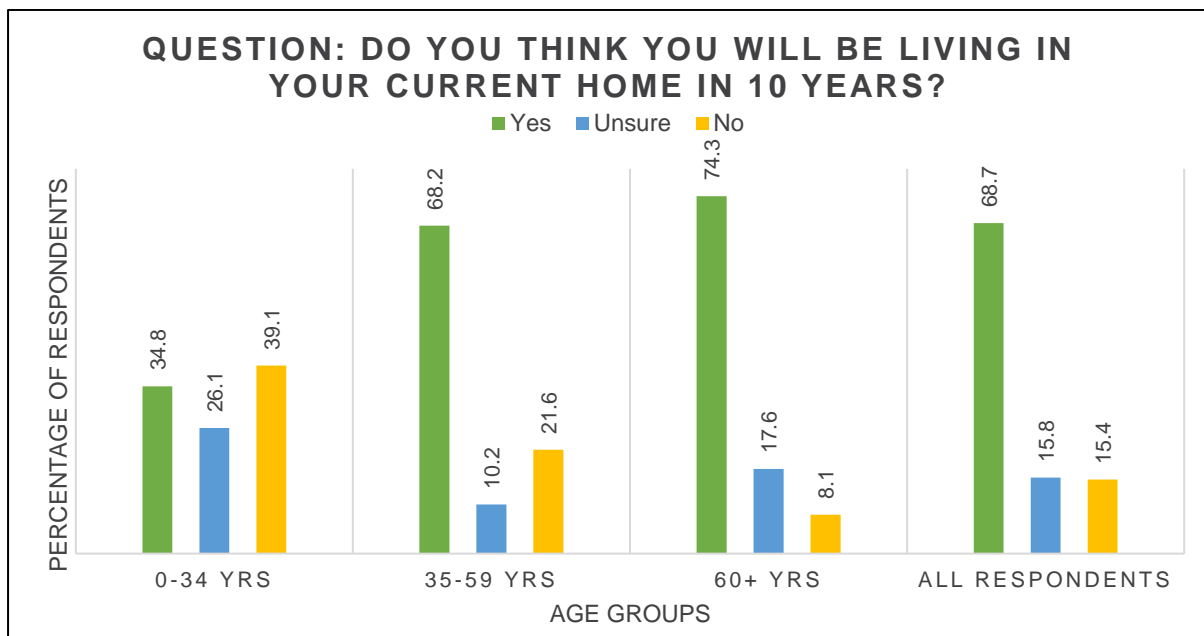


Figure 7: Potential mobility patterns of survey participants (Study Area and Shoalhaven residents).

- The results show a higher level of mobility in younger age groups, with only 35% of people aged under 35 indicating that they intend to remain in their current home in the long-term.
- 74% of survey participants over the age of 60 told us that they intend to remain in their current home, with 76% of these living in single detached homes.

The 81 survey participants who indicated an intention to move were then asked where they would like to be living in 10 years' time. This question aimed to encourage people to consider where additional housing may need to be located to accommodate the needs of the future community.

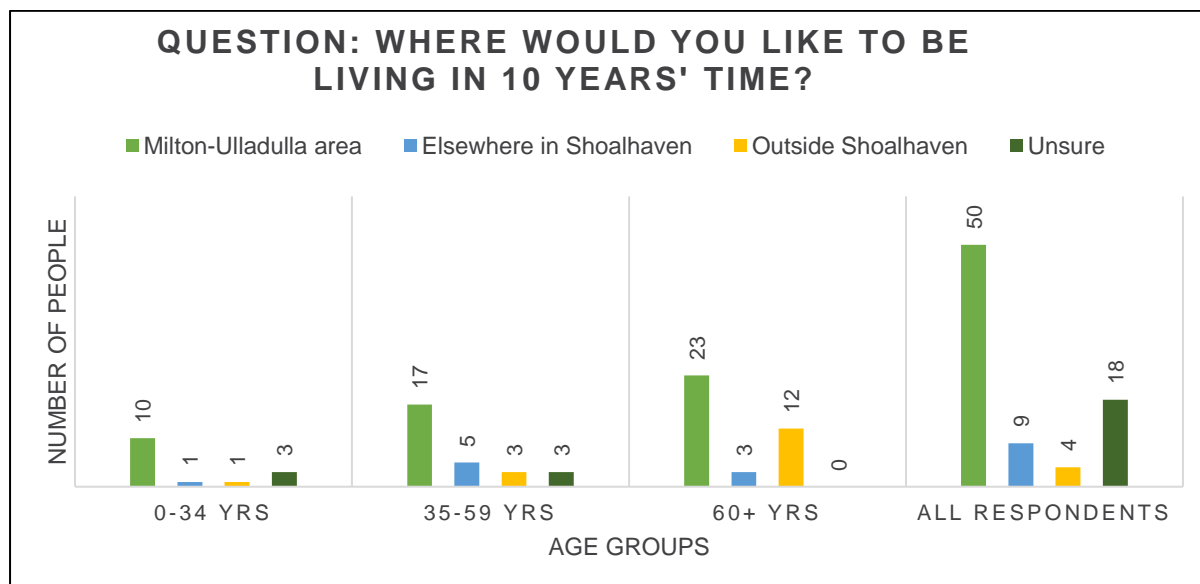


Figure 8: Preferred place of residence (by broader region) in 10 years' time.

- Results indicate that 50 of these people (or 62%) would like to be living in the Milton-Ulladulla area, over other locations within and outside Shoalhaven.
- Additional analysis shown in Figure 9 indicates that:
 - One third of these people would like to be living close to the beach.
 - People in the younger age groups were more likely to want to live in rural areas.

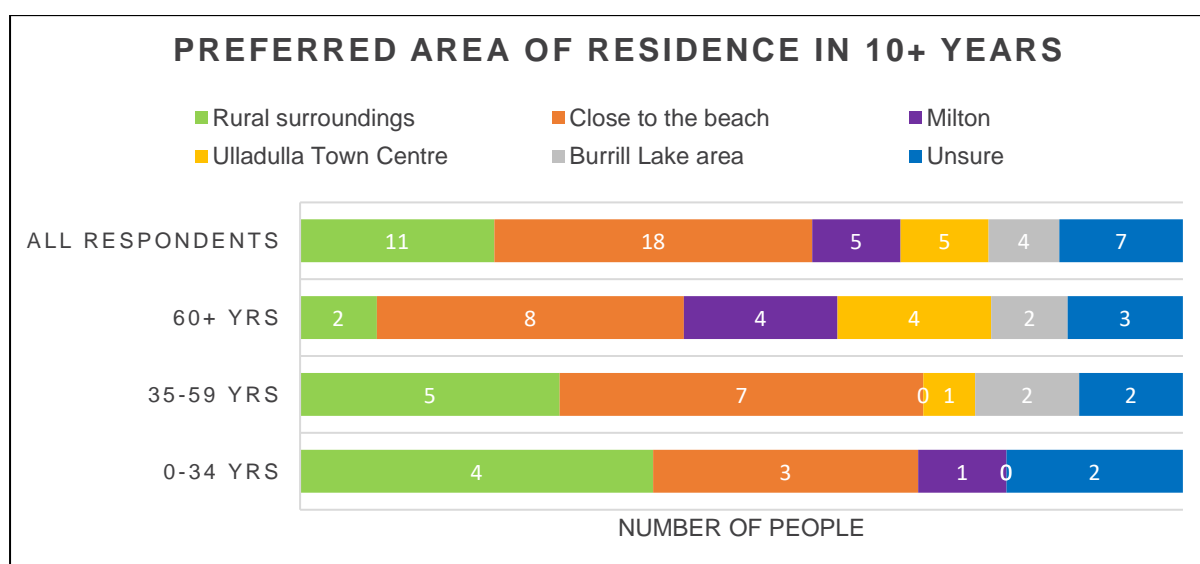


Figure 9: Preferred area of residence within the Study Area in 10 years' time.

Survey participants who indicated an intention to move were also asked about the type of home they would prefer to be living in in 10 years' time. This question aimed to encourage

people to think about the types of homes that may be required to accommodate the needs of the future community.

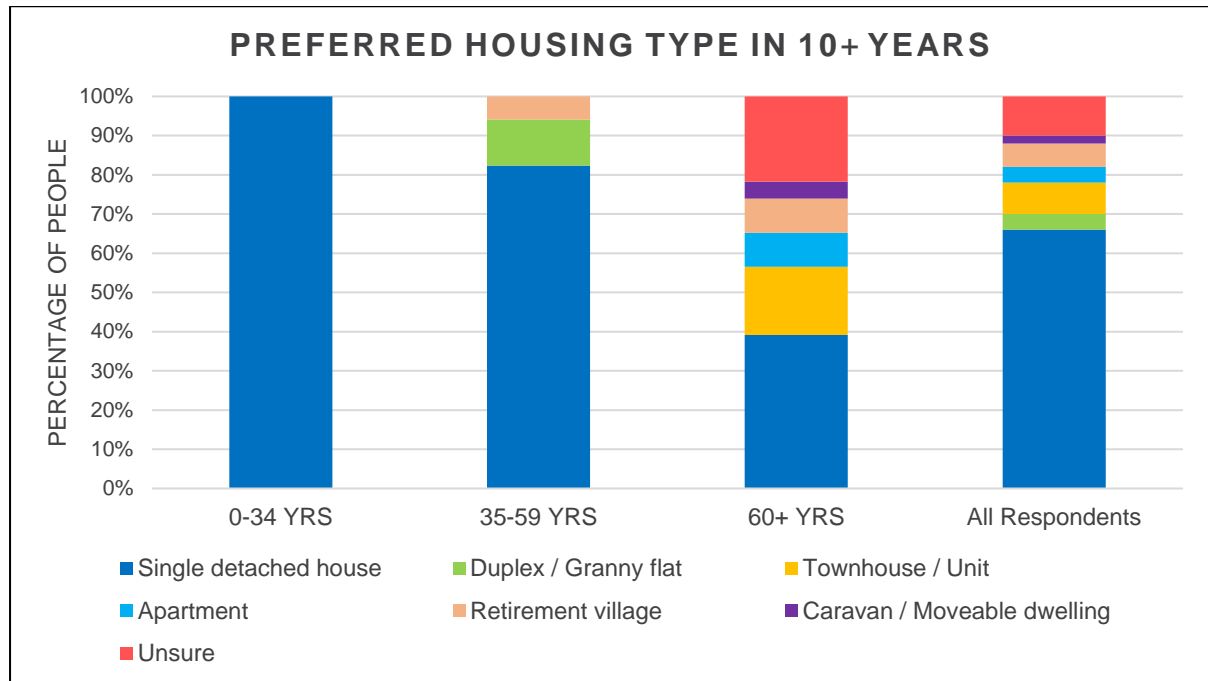


Figure 10: Preferred housing type of people who intend to move within 10 years' time.

- All respondents aged under 35 expressed a preference to live in a single detached house.
- The preference for single detached homes was also strong in the 35-59 cohort.
- People aged over 60 indicated a desire for more diverse housing products, such as townhouses / units, apartments, or retirement homes.

We also asked people who live within the Study Area and broader Shoalhaven to consider the housing needs of their immediate family members over the next 10 years. We asked:

Q1. Whether immediate family members would be likely to be living in the Study Area in 10 years?

Q2. If not, why not?

Q3. If so, what type of home they may need?

The results were evenly distributed in response to question 1, with roughly one third of respondents in each category answering yes (89 people), no (92 people), or unsure / not applicable (78 people).

For those people who answered “no”, key reasons why their family members would not be living in the Study Area in the future include work or study commitments out of the area (62%), issues with housing affordability and availability (20%), or other / unsure (18%).

For those people who answered “yes” to question 1, 73% of people indicated that their family members would most likely need a single detached home to meet their housing needs in the future. Other responses included higher density homes (dual occupancy / townhouse / unit), retirement villages, or still living in the family home.

These findings indicate:

- A continued demand for new homes within the Study Area, principally for single detached homes.
- A strong historic and current desire, including by older households, for single detached homes, i.e., 'real-world demand' versus potential downsizing behaviours.
- A demand for adaptable and accessible homes to support ageing in place.
- That more diverse housing types (i.e., higher densities) will contribute to meeting housing demand, but at a slower rate than single detached homes (i.e., there is a short-term growth management response focussed predominantly on greenfield supply).

Perceptions of Housing Affordability

We asked survey participants from the Study Area and broader Shoalhaven whether they thought housing was affordable in the Milton-Ulladulla area. 68% of all people considered housing to be unaffordable, while 20% of people considered housing to be affordable and 12% were unsure.

The results were quite interesting when analysed by age cohort, as shown below.

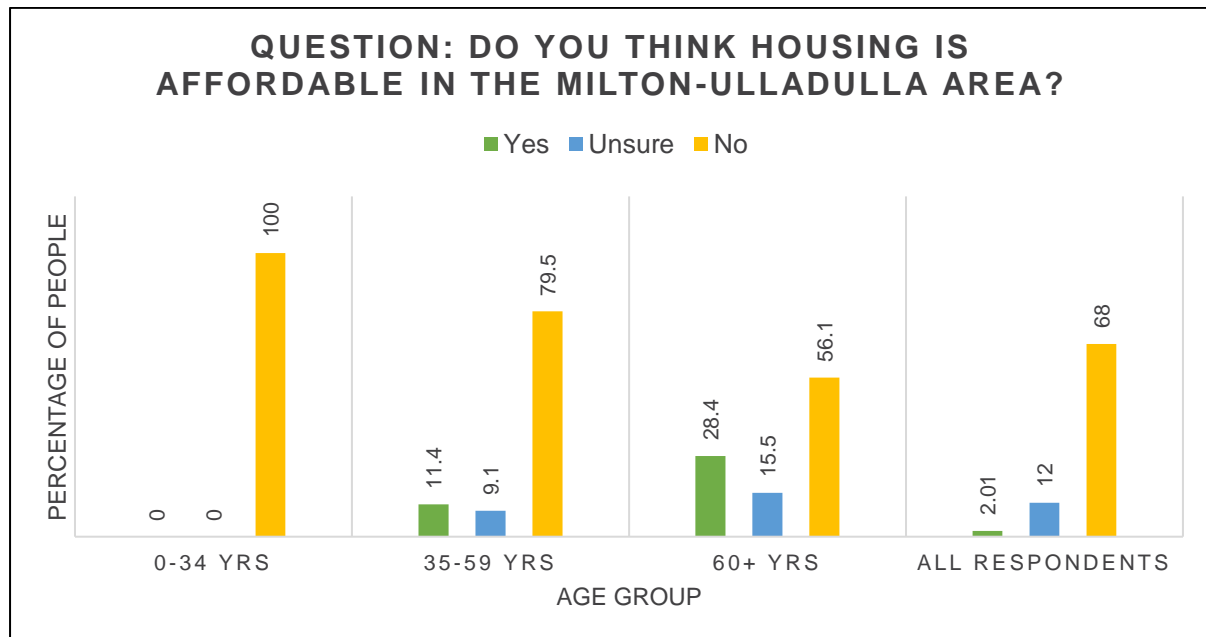


Figure 11: Perceptions of housing affordability in the Study Area.

These results show that the perceptions of affordability differ greatly across the different age groups:

- 100% of respondents under the age of 35 consider housing to be unaffordable. This is likely a reflection of the difficulties encountered by first home buyers attempting to enter the housing market.
- 80% of respondents between 35-59 consider housing to be unaffordable. This is likely a reflection of the difficulties encountered to both new entrants to the housing market, and also experiences of those changing homes / 'trading up' within the current market.
- Only 56% of people aged over 60 considered housing to be unaffordable.

These results are considered to be influenced by:

- **Higher levels of home ownership amongst older households.**
- **A desire to 'age in place', suggesting a relative detachment from current market conditions.**

Community Values

We asked all survey participants a series of value-based questions to determine where they might be comfortable with new development potentially occurring in the future. The results indicate:

1. Development / use of land used for farming

- Strong objection from older age groups.
- Younger age groups neither opposed nor supported, which suggests that well designed development (managed by development controls) in suitable locations may be acceptable.

2. Development / use of land with scenic values

- Objections from all age groups, with stronger objections from older age groups.

3. Development / use of land with views towards the ocean/mountains

- There seemed to be a level of comfort indicated with use of this land across all age groups.
- This suggests that good development (managed by development controls) in suitable locations may be acceptable.

4. Development / use of land requiring removal of trees and vegetation

- Strong objection across all age groups to the removal of vegetation.

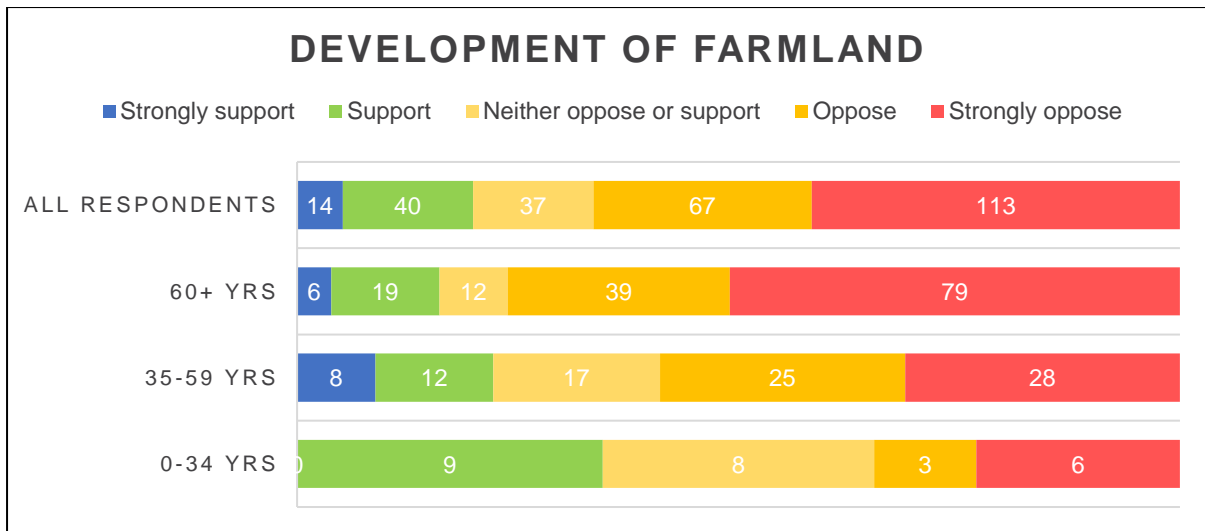


Figure 12: Level of community support for potential future urban development of farmland.

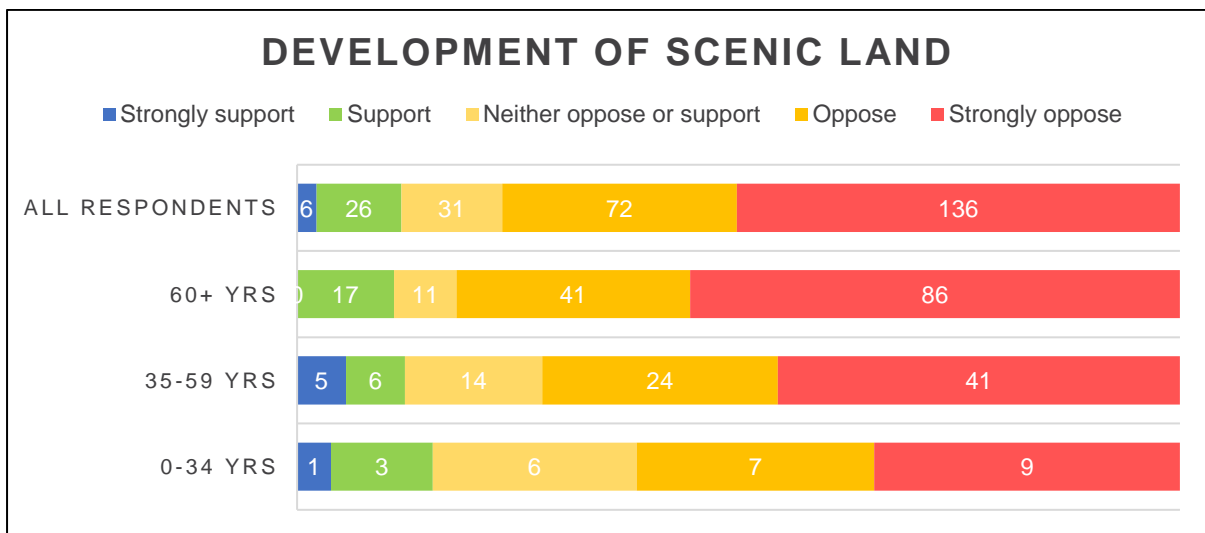


Figure 13: Level of community support for potential future urban development of land with scenic values.

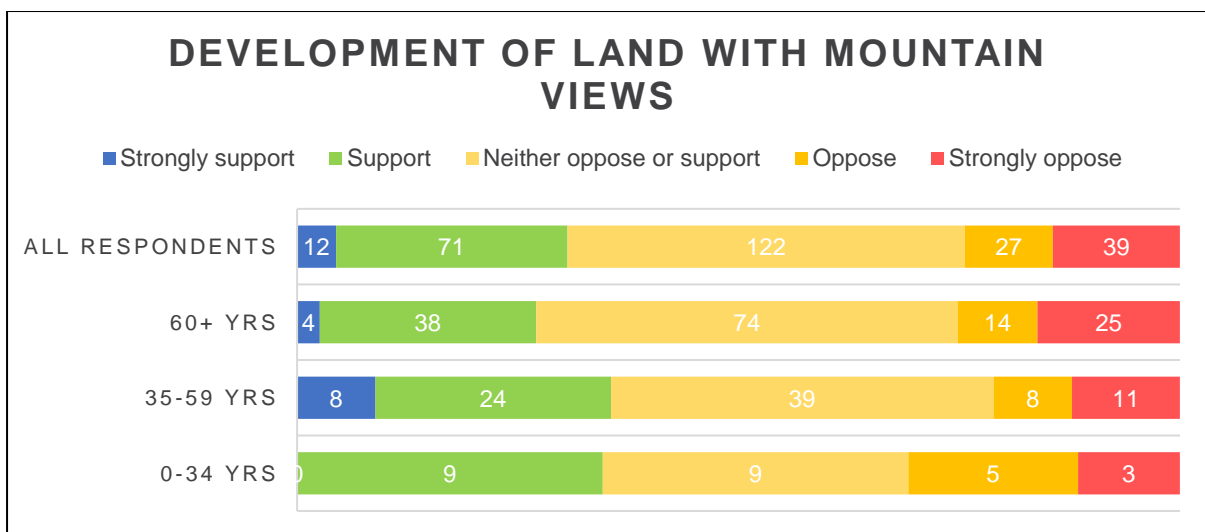


Figure 14: Level of community support for potential future urban development of land with mountain views.

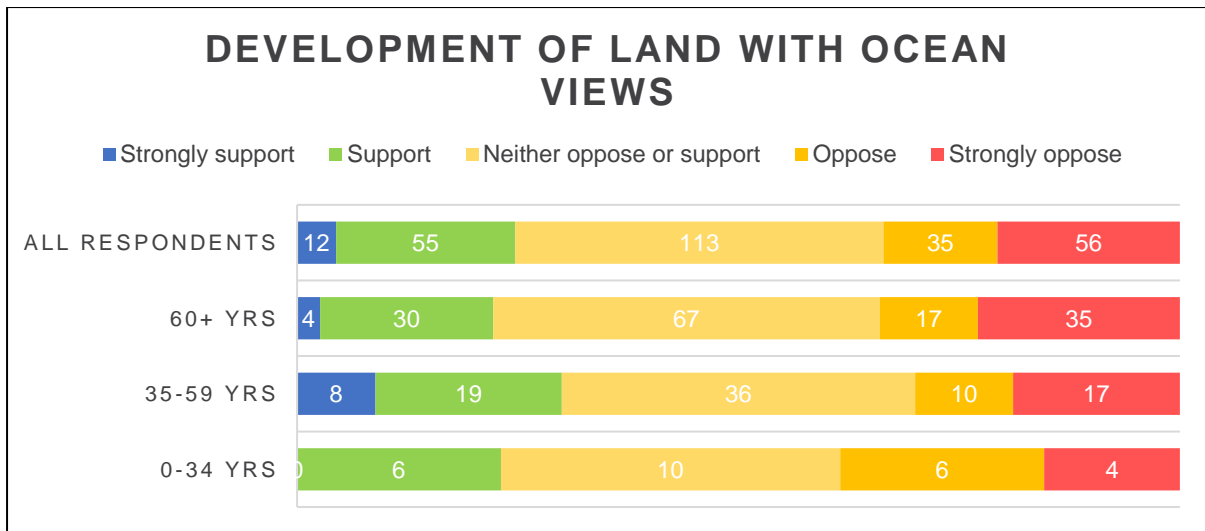


Figure 15: Level of community support for potential future urban development of land with ocean views.

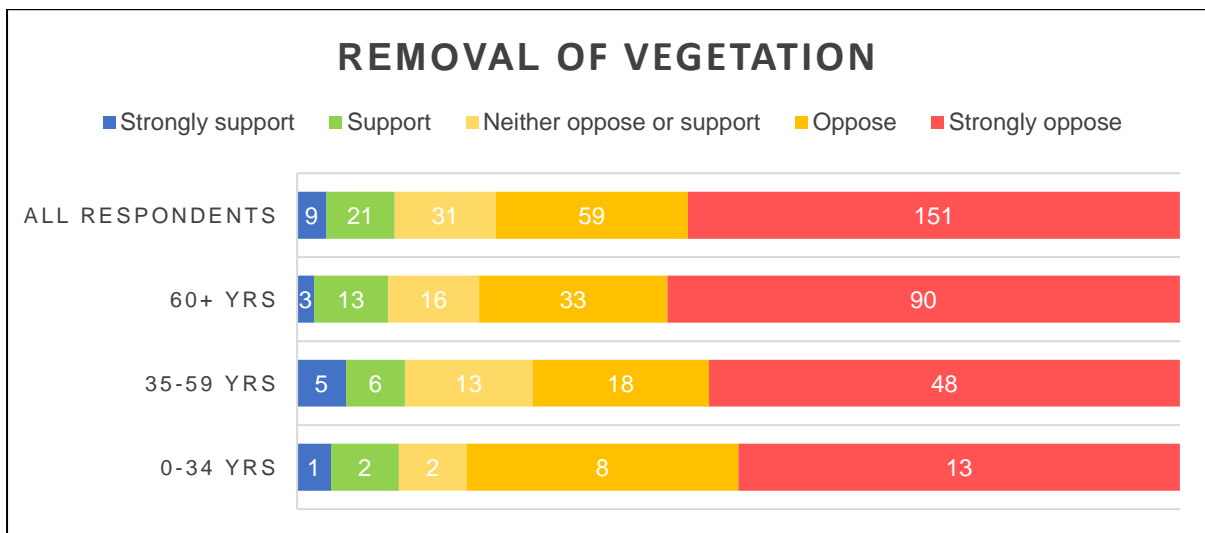


Figure 16: Level of community support for potential future urban development of land with high biodiversity values or significant vegetation.

We also asked survey participants a series of questions about their level of comfort with higher-density development types (for example, townhouse / unit developments and apartment buildings) within the Ulladulla Town Centre. In response:

- All age groups were generally supportive of townhouse / unit development.
- All age groups, particularly younger age groups, indicated some acceptance of increased densities if the height of buildings was appropriately managed (up to 3 storeys).
- Respondents indicated less comfort with higher densities, particularly buildings 4 storeys or greater, with older age groups indicating less support for taller buildings.

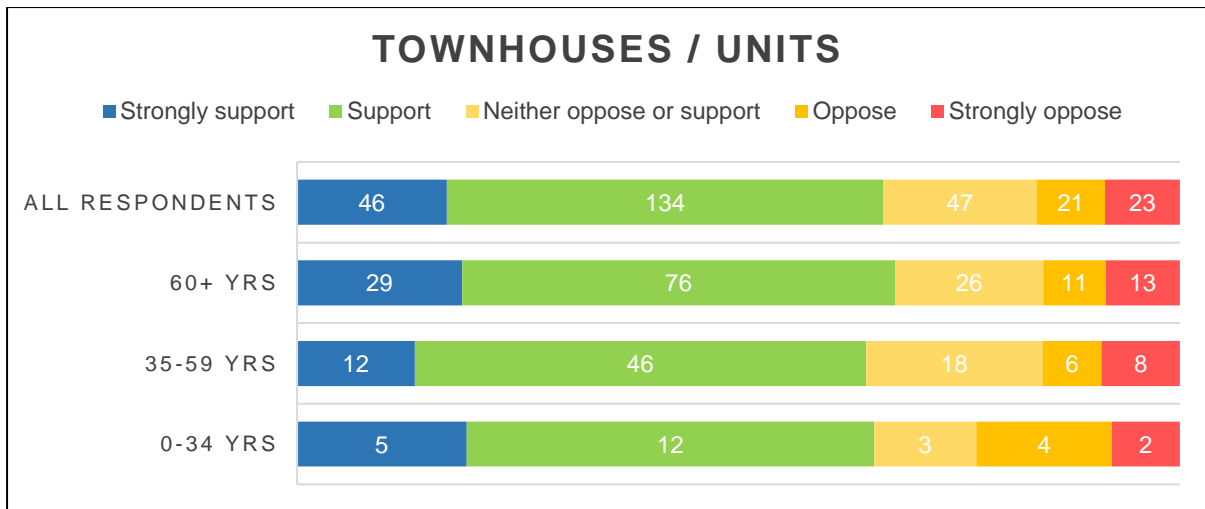


Figure 17: Level of community support for potential future development of medium density development in the Ulladulla Town Centre.

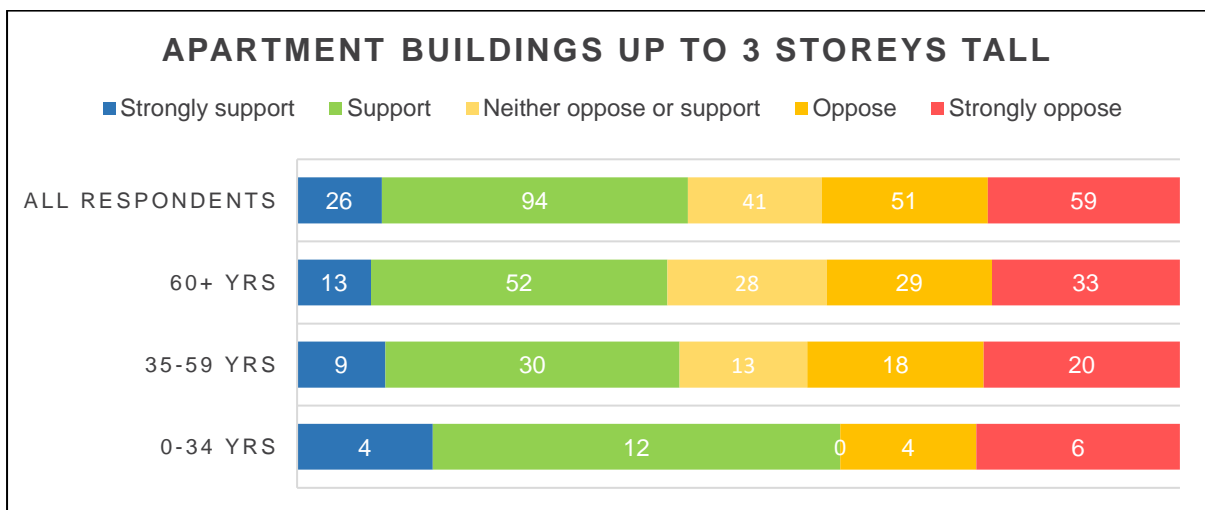


Figure 18: Level of community support for potential future development of apartments buildings up to 3 storeys tall in the Ulladulla Town Centre.

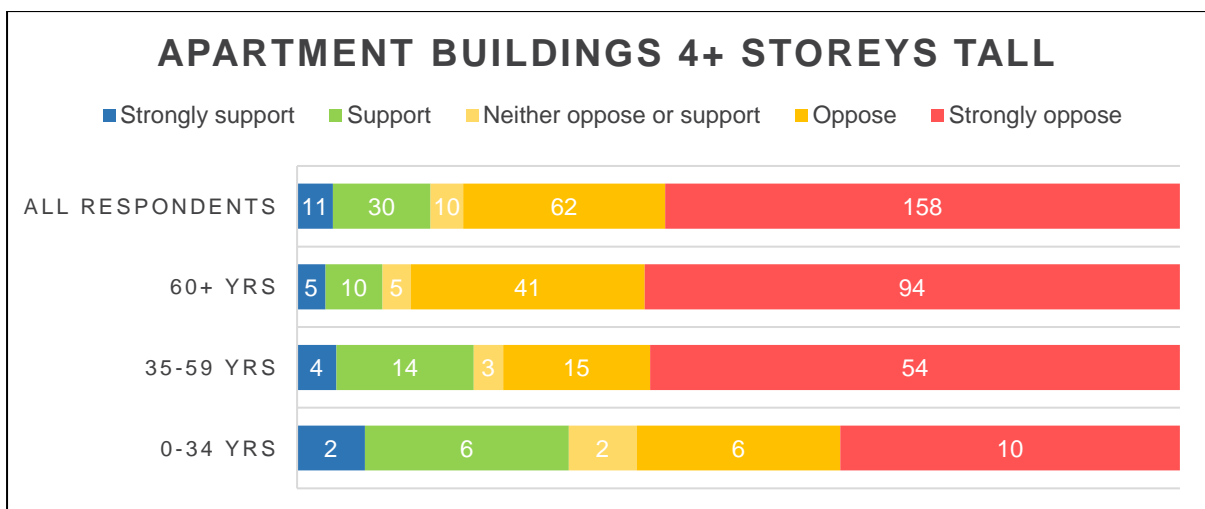


Figure 19: Level of community support for potential future development of apartments buildings 4+ storeys tall in the Ulladulla Town Centre.

Future Engagement Activities

We also gathered feedback on preferred community engagement activities as we progress our work on this project. Preferred methods include surveys, written communication (letters and email), and community information sessions and workshops.

As noted, the low response rate for younger cohorts suggests that future engagement activities will need to consider how to better engage with younger age groups, particularly those under the age of 18, as well as people aged over 85.

Next Steps

The feedback is being used to inform our continued work on the review of the MUSP. The community responses to our survey provide a valuable account of current housing needs and preferences, as well as providing some insight into the potential future needs of the community. This will be used to assist us with determining where and how growth could occur within the Study Area over the next 25-30 years.



Address all correspondence to:

The Chief Executive Officer

PO Box 42, Nowra NSW 2541

shoalhaven.nsw.gov.au/contact

1300 293 111

shoalhaven.nsw.gov.au    