The Great Australian Dream: Density and Aspirations in Sydney

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A global assessment of the relevance of aspirations in driving spatial planning strategies

During the post war period, Sydney has experienced high levels of growth and urban sprawl resulting in declining and costly infrastructure, a lack of affordable housing close to amenities and increasing economic segregation. Demand for low density suburban housing is consistently cited as the primary obstacle to higher and more sustainable densities, with high density housing widely viewed as an affront to the *Great Australian Dream* – the aspiration to own a detached house on its own quarter acre plot. (Winter and Stone, 1998)

This study assesses the continued relevance of the Great Australian Dream as a driver of housing development in Sydney. It also looks at Sydney's hopes to be a global city[3] and how these are affected by the Great Australian Dream. Using a method based on demographics and households, a comparison is drawn between Sydney and four global cities: London, New York, Copenhagen and Detroit. In each of the four, equivalent households to the Australian 'aspirationals' are identified, together with the types of housing they occupy. The study shows that the 'aspirationals' are present in each of the four cities, but that detached housing is at negligible levels in both London and New York, and at a low level in Copenhagen; in this comparison Sydney emerges as most like Detroit. Overall, the Great Australian Dream was found to be at best a redundant driver of development strategies, and at worst a destructive force for the longevity of the city; it needs to be redefined if Sydney is to protect its longevity and prosperity.

Keywords: density, aspirations, lifestyle, affordable, housing

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[3] city is defined in this context as the geographical and administrative areas subject to the studies outlined by the Globalisation and World Cities Research Network, http://www.lboro.ac.uk/gawc/index.html

1. Introduction

The predominant form of housing in Sydney has remained largely unchanged since the postwar period, despite the changing needs of the city and its more recent wider aspirations to be a global city. This is ostensibly driven by demand. Planning is largely informed by the popular aspiration to own a house on a *quarter acre block*, dubbed The Great Australian Dream. As a result, property prices in the urban capitals have risen to well beyond the means of lower income households, who are driven progressively further towards the urban fringes and away from essential infrastructure.

Despite the clear need for a more proactive approach to managing growth, a fear of producing 'undesirable' and thus, unprofitable, housing has meant that many of the attempts at incorporating so-called smart growth strategies have been largely token or piecemeal in nature. This approach has impacted their effectiveness, and in the process, negatively impacted the image of higher density housing and urban consolidation efforts amongst Sydneysiders and Australians in general.

The aims of this paper are two-fold: The first aim is to identify the connection between the housing aspirations of Sydneysiders, the origins of these aspirations and why aspirations have become and remained such a significant driver in the development and planning profile of the city. The second is to compare these findings against those of a selection of other cities around the world that are using both passive and proactive planning policies and the way in which such decisions have shaped these cities.

The ultimate aim of this paper is to determine whether the notion of the Great Australian Dream is still a relevant development and strategic planning driver for the future of Sydney.

2. Methodology

The Metropolitan Development Program (2008/09), the main planning instrument for the Sydney metropolitan area (defined as the administrative area governed by the Metropolitan Development Program), and its associated paper, the Metropolitan Strategy Review: Sydney Towards 2036 Discussion Paper (2011) include data on the Local Government Areas which have experienced the highest levels of housing growth in the last ten years, including the areas in which this growth has been primarily in the form of detached, low density housing in Greenfield areas. Greenfield areas are an important parameter as development in these areas has materially contributed to the horizontal expansion of the city and the resulting strain on infrastructure. It has also contributed to the growing economic segregation within the metropolitan area, which has seen low income households driven progressively further towards the urban fringes.

In order to measure and quantify the housing aspirations of the residents of Sydney, this study will make use of consumer segmentation analysis, a highly interrogated form of census and population data, which will determine the resident profile of the low density sprawl paradigm. The tool used for this assessment is a geo-demographic segmentation tool known as Mosaic, developed by Experian PLC, which also offers a globally consistent

classification system, known as Mosaic Global. There is currently Mosaic data available for 24 countries worldwide. Mosaic Global operates on the basis that the world's cities share the same residential patterns – that is, that people everywhere are essentially the same and as a result, can be classified using a consistent taxonomy.

This is most helpful in enabling cross-comparisons across geographies. In the context of this study, once the resident profile of Sydney has been determined, the same groups of people will be examined in a selection of cities worldwide, employing both proactive and passive growth management strategies. The ultimate aim of this exercise is to determine the types of housing acceptable to the same types of households in other cities globally, and the contextual parameters that influence these choices. These parameters can then be assessed against the factors that drive housing choices in Sydney, and assist in the assessment of the Great Australian Dream as a relevant policy driver.

2.1 City Selection Process

The determining factor behind the selection of the cities has been the quality of the available Mosaic data for each city option. The four cities selected for this exercise are London, New York, Copenhagen and Detroit. According to Sydney's Metropolitan Strategy Review (2011), "The future of the Sydney region and more broadly the whole of New South Wales (NSW) is integrally linked to the success of Sydney as a Global City. The city's global status needs to be enhanced." (NSW Department of Planning and Infrastructure, p.7) According to the research carried out by a variety of global journals and research bodies such as the Foreign Policy Journal and the Global and World Cities Research Network on the topic of the nature of global cities, both London and New York consistently and invariably feature at the top of global cities indexes. This forms the basis of their selection for this study.

Copenhagen has also been selected as it is widely acknowledged to have qualities to which cities such as London and New York aspire, due to its highly successful urban planning mechanisms. Indeed, the term 'Copenhagenisation' is derived from the efforts undertaken by the city to progressively reduce its reliance on travel by private car, and improve the mobility of its residents through other means (most notably by bicycle). It was formally integrated into the spatial planning strategies of many global cities, including both London and New York.

The equivalent types of households who are seen to be the primary market for detached housing on the urban fringes in Sydney are assessed in these three cities to determine the extent to which they make up the resident base of each, and the dwelling types which make up the housing norms for these types of households in each city.

Also as part of this study, one additional city adversely affected by the global economic downturn is assessed. In the United States, the advent of global economic crisis has brought the argument for better planned cities into relief as many middle-American towns and cities bear the brunt of the economic crisis. A notable example is the city of Detroit. By undertaking the outlined exercise, the aim is to demonstrate the potential impacts of market led housing strategies and conversely, of proactive growth management on the long term liveability and prosperity of the city.

3. Sydney's Housing Quandary

As a general trend, due to an aging population (ABS, 2011) households are shrinking in size (number of people per household) (Kelly et al, 2011b). However, higher density housing in Sydney still represents little more than a quarter of all dwellings (Darcy, 2008). It was recently revealed that in 2009 Australia overtook the US in producing, on average, the largest houses in the world. (Johanson, 2011) It is therefore a fair assessment of housing supply in the Sydney market to say that while households (number of persons per dwelling) are shrinking, houses themselves are growing in size.

Sydney was endowed with a sophisticated and extensive heavy rail system relatively early in its life which meant that the upper and middle classes and even some better paid members of the working class, could now aspire to a house and garden in fresh country air. These new residential suburbs were built along train lines radiating out from the city centre. (Forster, 2010)

Additionally, federal government policies greatly favoured owner occupation through a highly incentivised taxation system for home owners. Home ownership was all but synonymous with new, detached housing, and had become no longer a luxury but an expectation, as had car ownership. The low level of investment in the inner city suburbs, other than in the form of freeway infrastructure, had also helped to make the suburbs more desirable by comparison. Therefore, as Forster points out, "while Australian families may have freely chosen the suburban way of life, the circumstances, partly shaped by governments, had made it difficult for them to make any other choice". (Forster, 2010, p.25)

The subdivision and development of previously rural or vacant (so-called Greenfield) areas around Sydney has formed a large part of the accommodation strategy for Sydney's growing population since the city's inception, but escalated in particular since this period.

While the release of land for detached development has slowed in recent years, there is an ongoing belief in both public and private enterprise that continued land subdivision should form at least part of the ongoing housing strategy of the city, and this is reflected in the current metropolitan plan for the city, despite a recent planning history that abstractly acknowledges that this manner of continued growth is unsustainable.

Under environmental and economic pressures, and in response to the increasing prevalence of smaller households, the last two decades have seen a growing trend towards increasing the number of denser multi-unit apartment buildings. This, combined with changes to planning laws designed to address concerns over the environmental and economic costs of urban sprawl, resulted in a 30 per cent increase in the number of apartments in Sydney between 1996 and 2006. (Darcy, 2008)

However, even such incremental change in the housing profile of the city has engendered vehement protests from various quarters, both private and public sector, with the president of one community action group stating in a widely distributed report "Unless we are vigilant, high-density zealots will do their best to reverse centuries of gains and drive us back towards

a Dickensian gloom." (Recsei, T, "Save Our Suburbs" in Demographia, 2011) The reasons behind this apprehension are manifold, but as pointed out by Kelly et al:

Despite the easygoing bravado, Australians have a pronounced private streak. They don't want their pleasure or pain heard by neighbours and resent being drawn into the daily lives (...) of those around them. Living in smaller, communally oriented spaces brings this fear to the forefront. (2011b, p. 12)

To contextualise this however, in general, the housing profiles of cities are slow to change (Kelly et al, 2011a). The enduring prevalence of the Great Australian Dream as a housing aspiration and development driver is at least partly driven by the fact that aspirations for new housing are invariably driven by the existing stock (Kelly et al, 2011a), and thus the paradigm continues to perpetuate itself.

4. Sydney in a globalising context

Figure 1: Global Cities by Area and Density

Figure 1 shows the current area of Sydney at the same scale alongside the other global cities. The delineations have been made based on the boundaries of each city. The darker area shows the confines of the traditional boundaries of the metropolitan area. The lighter area shows the exurbs primarily dependent upon the metropolitan city proper.

Table 2: Global Cities by Area, Population and Density

City / Metric	Sydney	Copenhagen	London	New York	Detroit
Area (km^2)	12,145	456	1,572	1,214	10,130
Population (millions)	4.575	1.199	7.825	18.223	4.296
Density	377	2,632	4,978	15,006	424

At a glance the diagram shows Sydney to be physically similar in size to Dublin, Madrid and Detroit, all cities noted for their passive urban planning. Sydney has the largest core metropolitan area and the second lowest population density after Dublin.

5. Consumer Segmentation

The control group defined for this study represents the collective groups of households who share in the biggest percentage of uptake in developments on the urban fringes of the capitals. In Australia, developers spend much time and resources identifying this category of people, where they come from, what they value and most importantly, how they want to live. A percentage of the control group are also occasionally referred to as 'the aspirationals' or 'Aussie battlers', who, in an urban context, can range from long term outer suburban working class to the long term economically disadvantaged.

Firstly, the way in which people live in Sydney today is assessed. The method selected for this analysis is heavily reliant on so-called consumer segmentation analysis. Consumer segmentation "is the process of classifying people into groups that have some set of similar characteristics, resulting in the ability to be studied and targeted" (XTREMEimpakt, 2008). One of the most comprehensive and widely used global consumer segmentation tools is Experian's Mosaic. The Mosaic Australia *Groups* and sub-groups (known in Mosaic as *Types*) and the percentages of each in Sydney and Australia are shown in Table 2. In Mosaic Australia, there are eleven Groups and forty seven Types.

5.1 Sydney's Mosaic Profile

Mosaic profiling is particularly powerful as the data is geographically accurately mapped. Through this mapping it is possible to identify the residential patterns in the city. Each (coloured) dot represents an individual household, and the colour itself denotes the Mosaic Type to which the household belongs. It indicates the clustering of demographics across the city from the harbour and seaside suburbs to the outer urban ring.

5.2 How is the control group identified?

The Metropolitan Development Program (2011) has identified the local government areas with the highest levels of detached housing development in Greenfield areas in the last 10 years. By identifying the Mosaic Types most likely to buy and live in these areas in detached housing, a finite group can be created for the purposes of comparison with other cities around the world.

In order to identify who the control group is in Sydney by Mosaic Type, the Mosaic map of Sydney is overlaid with the areas that have the highest levels of detached housing development in Greenfield areas in the last 10 years (as identified in the Metropolitan Development Plan for Sydney (2011) Table 2 shows the results from the overlay of these outputs. It shows a finite list of the top Mosaic Types which together form the Mosaic profile of the control group in Sydney.

Table 2: Sydney's aspirationals by Mosaic Type

Rank	Type		Label	Description	% Syd	% Aus
1	A04		Executive Residents	High consuming maturing families in comfortable outer suburban locations	2.6	2.5
2	D13		Cul-de-Sac Kids	Mortgaged families living in the better value outer metro fringe areas	2.4	2.2
3	E17		Home Entertainment	Blue collar families living in the older pockets of the outer suburbs	3.9	4.2
4	A05		Family Success	Well off family households in desirable outer suburban locations	6.4	2.5
5	F22		Devoted Diversity	Mature and religious close-knit families in newer metro fringe developments	3	1.5
7	E16		Families in Formation	Couples and families with young children living in recent outer suburban locations	1.2	2.7
8	D15		Mortgaged Aspirations	Culturally diverse young families living in high density suburban communities	4.6	1.3
9	D14		New Lives, New Landscapes	Young families living in recently developed outer suburbs of larger cities	0.9	1.6
10	E18		Domestic Divides	Single parent and varied family structures in outer suburban communities	2.2	3
12	E19		Conforming Kinship	Cash-strapped late middle aged traditionalists in outer metro areas	1.8	3.9
16	F20		Intercontinental Connections	Established Eurasian migrants in mid to outer suburban locations	6.1	3.1
20	F23		Mediterranean Style	Established low income migrant home owners around suburban retail centres	0.4	1.6
23	F24		Bilingual Backgrounds	Mixed age multi cultural areas of mainly blue collar employment	7.7	1.7

Source: adapted from data derived from Google Maps, 2011 and Pacific Micromarketing Mosaic 2011, courtesy of the Lend Lease research license

Based on this data, the control group in Sydney forms a total of 43.2% of the population of Sydney – a significant proportion. In the following global assessments, the Types identified in Sydney are examined in other cities around the world.

6. London

The case study for the city of London focuses on the area known as Greater London. They are as follows:

Table 3: Mosaic UK Types of Sydney's control group in London

Type		Label	Description	% London	% UK
B05		Mid Career Climbers	Families enjoying the fruits of career success in pleasant detached houses	0.26	2.3
B07		Distinctive Success	Successful business people, often self made, living in large detached houses in semi-rural locations	0.05	0.48
B08		Dormitory Villages	Comfortably off families in spacious homes in pleasant settings but within easy reach of jobs	0.05	1.29
B09		Escape to the Country	Families choosing to give their children a country lifestyle while commuting to urban jobs or running businesses from home	0.03	1.31
D17		Jacks of All Trades	Blue collar workers and traders, serving the needs of small market towns	0.01	1.99
D18		Hard-working Families	Married couples approaching retirement age, in not especially fashionable small town locations	0.14	2.63
F24		Garden Suburbia	Mid-life families with above average incomes living in the nicer middle ring suburbs of larger cities	2.20	2.14
F25		Production Managers	Middle income married couples, owning unpretentious, semi-detached housing	0.03	2.63
F26		Mid-Market Families	Families with many grown-up children still living at home, living in cheaper suburban semis	0.12	2.7
F27		Shop Floor Affluence	Employees earning reasonable incomes, living with their families in relatively inexpensive semis in industrial towns and cities	0.32	2.73
F28		Asian Attainment	Comfortable middle aged families with school aged and older children, predominantly from an asian background	2.48	0.98
G30		Soccer Dads and Mums	Parents of school age children, owning large recently built detached houses with mortgages funded by their successful careers	0.06	1.34
G31		Domestic Comfort	Families with high incomes derived from managerial positions and considerable property wealth in their suburban detached houses	0.04	1.09
G32		Childcare Years	Young, well educated and well paid couples, either married or cohabiting, most of whom are starting families	0.13	1.52
H37		First to Move In	People living in the most recently built, brand new housing	0.17	0.37
I38		Settled Ex-Tenants	Older couples whose children have flown the nest working in low skilled occupations and living in ex-council housing	0.06	2.06
I39		Choice Right to Buy	Middle aged couples, some with older children still at home, living in the more desirable ex-council areas	0.19	1.72
I40		Legacy of Labour	Older families on low incomes living on council estates in areas where industry was once prevalent	0.01	2.68
I41		Stressed Borrowers	Middle aged people renting or owning in council areas, many of whom are over-stretched with debt 2.20	0.70	2.2
J43		Streetwise Kids	Large young families with many single parents, often unemployed and claiming benefits, living on deprived council estates	0.32	1.05
J44		New Parents in Need	Young parents, often single, bringing up young children in barely adequate council terraces facing considerable disadvantage	0.00	1.8
M55		Backyard Regeneration	Singles and families in affordable but respectable terraces which for the young are a stepping stone to better things	0.15	2.06
M56		Small Wage Owners	Owners living in inexpensive private terraces in a range of relatively low paid occupations	0.55	3.09
N57		Back to Back Basics	Young sharers and couples with young children, starting out in low price, older terraces	0.05	1.97
N58		Asian Identities	Traditional South Asian families owning relatively small terraces for their many family members	0.16	0.88
			TOTAL	8.28	45.01

Source: adapted from Mosaic UK Interactive Guide, Experian, 2011

The low percentages corresponding to each Type and the low total percentage for these Types in London would indicate that while there may be a significant percentage of Britons who are corresponding Types to Sydney's control group, only a small percentage actually live in London. As indicated by the descriptions, many of these Types have deliberately chosen semi-rural lifestyles, outside the confines of the city. Others live in public housing, a tenure which accounts for far greater numbers in the UK where it has a much stronger and

more robust history, than in Australia. Spatially, development areas in London are limited, and the current London Plan notes the housing shortage and consequent lack of affordability of housing in London to be the most urgent of issues. (GLA, 2011)

There is very little detached housing available in London and what little there is, is well out of the financial reach of most people in general. For this reason, the Types to whom detached housing is an important lifestyle factor will forego living in London itself in favour of smaller towns in London's exurbs.

7. New York

New York City is naturally contained by its peninsular topography and has a population of over 8 million people covering an area of just 790 square kilometres. (NYC Dept of City Planning, 2011) The equivalent Types to Sydney's control group make up well over half of the overall population of the city. However, detached living in New York City is almost unheard of, even in the minor boroughs. The following figures are drawn from both US Census information and an in depth Mosaic analysis by zipcode for each of the five boroughs of New York City.

Table 4: Mosaic USA Types of Sydney's control group in New York City

Type		Label	Description	% NYC	% USA
P57		Meager Metro Means	Mid-scale African-American singles established in inner-city communities	20.67	0.62
P58		Fragile Families	Multi-cultural singles and families with mid and low incomes living settled lives in urban apartments	19.11	0.73
A06		Jet Set Urbanites	Mix of affluent singles and couples living high rise, fashionable lives in urban neighbourhoods	10.08	0.48
H26		Progressive Potpourri	Mature, multi ethnic couples with comfortable and active lives in middle class suburbs	2.21	1.00
D18		Soulful Spenders	Upper middle class African American couples and families living in the expanding suburbs	1.91	1.45
P61		Humble beginnings	Multi-ethnic singles and single-parent households with mid-scale incomes in city apartments	1.76	0.99
B10		Asian Achievers	Affluent, mainly Asian couples and families enjoying dynamic lifestyles in metro areas	1.35	0.56
D16		Settled in Suburbia	Upper middle class diverse family units and empty nesters living in established suburbs	1.09	0.77
I32		Latin Flair	Conventional Hispanic Gen X families located in selected coastal city homes	0.31	0.98
P60		Ciudad Strivers	Mid-scale Hispanic families and single parents in gateway communities	0.13	1.12
B08		Babies and Bliss	Middle-aged couples with large families and active lives in affluent suburbia	0.01	1.65
			TOTAL	58.64	10.35

Source: adapted from Experian Mosaic USA Interactive Guide, 2011

Unlike London, there is an over-representation of Types who are suburban in nature, but who choose to live in the denser surrounds of New York City. In the United Kingdom, the same types tended to choose not to live in London at all. As with London, the lack of available detached housing sees negligible numbers of New Yorkers who fit the control group profile actually living in detached housing in the confines of the city. Unsurprisingly, the housing types of all of New York's five boroughs are at a higher density than elsewhere in the country with a distinct under-representation of detached dwellings anywhere in New York City.

8. Copenhagen

The first regional plan for the Copenhagen area was initiated in 1947, primarily to combat the uncontrolled urban growth arising from industrialisation. Called the "Finger Plan", it divided the Copenhagen suburbs into five 'fingers' which were built around the S-train railway lines.

The area of Copenhagen is just 1/48th of Sydney's but its density is at nearly seven times that of Sydney. Denmark is highly urbanised reflecting the metropolitan primacy observed in Sydney, with approximately 85% of the population residing in cities. 34% of the total population resides in Copenhagen.

Table 5: Mosaic Denmark Types of Sydney's aspirationals in Copenhagen

Type	Label	Description	% Denmark
B04	Suburban Managers	Successful suburban families with time for everything	2.54
B05	Aspiring Younger Families	Successful young families in newer homes	1.53
B06	Mid-range Commuters	Commuting couples who live under the same roof	2.88
C08	Better-off Pragmatists	Families in series or chain houses with decent economy and fortunes	2.69
C09	Middle of the Road	Mr. and Mrs. Denmark - row on row	4.39
C10	Challenged Families	Rows of small and exposed economies	2.54
F18	Big City Flat Dwellers	Tenants in the cities from diverse backgrounds and with manageable economies	3.05
F19	Metro Melting Pot	Smaller, younger households with low income and wealth in the city swarm	2.67
F20	Multicultural Challenge	Multicultural people in rental housing in cities, small fortunes and challenges	2.70
F21	Urban Counterculture	Terraced houses in urban areas - young families with scarce resources	2.93
		TOTAL	27.92

Source: adapted from unpublished Mosaic Denmark data, courtesy of Experian UK 2011

The equivalent Mosaic Types to Sydney's control group forms just under a third of the Danish population. As with London, a number of the Types that align with Sydney's control group in Denmark are actually not likely to live in Copenhagen at all, but rather in semi-rural areas within easy reach of the large cities.

The most recent publicly available dwelling data available from Statistics Denmark shows the spread of detached housing in the different regions of Denmark. When viewed in conjunction with the Danish Types identified as Sydney's control group, the data showed that in Copenhagen, 62% of dwellings are indeed apartments, with just under 23% of people living in detached dwellings and a further 12% living in semi-detached dwellings. It would indicate that the reasonable trade-off for living in the capital region is to accept a denser housing model.

Amongst the most prevalent groups, as is clearly demonstrated by the data, there is a strong bias towards higher density dwelling models, particularly apartment style living, with the sole exception to this rule appearing to be the A Group, in the north of Copenhagen. As the spread of wealth appears to be across the entire city, it would appear that a significant portion of higher income earners also live in apartments both in the inner city and in the suburbs. This is in direct contrast to the Sydney situation where apartment living in the suburbs is invariably the mainstay of low income earners.

9. Detroit

One of the most prominent examples of passive, industry led planning and its possible consequences is the city of Detroit in Michigan, USA. With a peak population of nearly 5 million, Detroit was once the capital of the United States megalithic auto industry. Detroit is also a case study in the long term effects of economic and ethnic segregation on the health and wellbeing of the city.

Table 6: Mosaic USA Types of Sydney's aspirationals in Detroit

Type	Label	Description	% Detroit	% USA
S69	Soul Survivors	Older, down-scale African-American singles and single parents established in modest urban neighbourhoods	32.64	1.32
R67	Hope for Tomorrow	Young, low-income African American single parents in second city apartments	17.78	1.03
D18	Soulful Spenders	Upper middle class African American couples and families living in the expanding suburbs	10.89	1.45
P59	Nuevo Horizons	Middle-aged, mid-scale income Hispanic families living mainly within US border cities	2.26	1.26
P60	Humble beginnings	Multi-ethnic singles and single-parent households with mid-scale incomes in city apartments	0.59	1.12
R66	Cuidad Strivers	Mid-scale Hispanic families and single parents in gateway communities	0.58	1.89
P56	Rolling the Dice	Middle aged, mid scale singles and divorced individuals in secondary cities	0.63	1.69
		TOTAL	65.37	9.76

Source: adapted from Experian Mosaic USA Interactive Guide, 2011

The analysis process for the profiling of Detroit was carried out by identifying the top three dominant Types by zipcode in Detroit. The Mosaic Profile for Detroit shows that while there are only seven Types in total that make up the Mosaic USA equivalents of Sydney's control group in Detroit, they make up a staggering 65.37% of the overall population of Detroit. Indeed, there are more of these Types of households in Detroit than there are in Sydney.

The bulk of the population of Detroit is shown to be made up of only a small number of Mosaic Types indicating that while there is a large African American population in the city (indeed, a majority), there is little ethnic or economic diversity. The housing typologies also remain fairly low density with an over-representation of detached housing in 46.42% of the population. The higher density groups are only in medium density formations of up to nine units.

10. Conclusion

As evidenced by the market assessment carried out in this paper, while there is a desire for a continued low density profile for Sydney, and large suburban homes, there is also a desire for Sydney to take its place amongst the global powerhouses and to secure global opportunities for the continued prosperity of the city.

These findings are in stark contrast to the widely publicised and sensationalist figures published annually in the mass media in Australia. A brief interrogation of the figures published indicates them to be neither comprehensive nor rigorous in their assessments. The widely publicised findings of reports such as Demographia's Annual International Housing Affordability Survey has had a negative impact on the image of higher density housing, and has succeeded in ensuring that land releases continue to form a part of any housing strategy proposed for the city in fear of alienating the 'Aussie battler' and 'aspirational' electorates.

The Mosaic profile for Sydney indicates that the control group in this study forms over 40% of the overall population of the city and tend to live over 20km from the city centre. When aligned with the same groups globally, it was found that in London, New York and Copenhagen, the majority of the same Types of people tended mostly not to live in the confines of the city at all but to live in surrounding towns with their own sets of local amenities and infrastructure, and where required, commuting to centralised services in the city. This has had the effect of maintaining the confines of the city and ensuring that the area of the city remains sustainable for the provision of infrastructure of services.

In Detroit, however, the percentage of the control group equivalents in the failing city was found to be an astounding 65.37% of the total population of the city. As with Sydney, the physical area that the city covers is so large, residents can be living in semi-rural areas many miles from the city and still be considered to be living in Detroit, due to the city's ill-defined boundaries. The danger for Sydney is that fear driven policy and media induced panic about the implications of higher density development will continue to drive the demand for detached housing and subsequently, sprawl, to well beyond what the city can service.

In order to meet Sydney's macro aspirations of growth on a global scale, it is important for the strategic planning of the city to address the unchecked sprawl that has become a burden on the provision of infrastructure to the city. While this may mean that Sydneysiders will have to adapt to living in higher density dwellings, it will, as demonstrated through the Mosaic analyses of other cities around the world, ensure that those for whom living close to the city centre is an important factor will continue to live in the city and will readily make the sacrifice of living in smaller better designed dwellings. The main problem in Sydney is one of supply – there simply isn't enough affordable choice with regard to housing types in the suburbs in which people want to live.

It is for these reasons that it can also be surmised that the days of allowing the Great Australian Dream to drive development are long since gone – not simply because the city can no longer bear this burden, though this is an important driver, but because with the changing needs of the population, it is simply not aligned with the complex desires of the people anymore.

It is for this very reason that it is important to assess and interrogate the available market data using geo-demography tools and consumer segregation data, as the needs of the population of cities are no longer as simple as they once were. Developers and private enterprises have already started to use this information to drive solutions tailored to their desired outcomes, and it is important for public policy drivers and strategists to make use of all of the available information to make informed choices for the city.

This does not mean that the Australian egalitarian cultural ideals of opportunities for all, inherent in the concept of the Great Australian Dream, should be abandoned, rather that the new Great Australian Dream should be redefined to embrace the true meaning of sustainable development to ensure that equitable access to quality housing opportunities are available to future generations of Sydneysiders.

Acknowledgement

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