

# The Bruny Life Community Survey: results, observations and recommended actions

28 May 2018

## FINAL REPORT FOR KINGBOROUGH COUNCIL, DEPARTMENT OF STATE GROWTH and BRUNY ISLAND ADVISORY COMMITTEE

The Bruny Life Community Survey is the central part of the Bruny Island Liveability Study – an initiative of the Bruny Island Advisory Committee (BIAC), with funding from Kingborough Council and the Tasmanian Government.

The Study's lead consultant was Mathew Fagan, who developed this report and its recommended actions based on the views of Islanders as expressed in the Community Survey results.

In the words of many Islanders who completed the Community Survey, "it's important the survey results don't just sit on the shelf". To this end, the consultant developed several drafts of the recommended actions in this report (see pages 5-7) and then made amendments to these drafts based on input from BIAC and officers of Kingborough Council and the Department of State Growth.

It is the role of BIAC, Council and the State Government to determine how quickly and how completely this report's recommended actions are progressed in 2018 and over the longer term.

*For more details about the study go to: [www.brunylife.com](http://www.brunylife.com)*

***bruny life.***

The Bruny Life Community Survey was conducted from 16 February to 16 April 2018. The survey has 82 questions:

- **7 questions about the respondent** (gender; age; resident status; length of time on Bruny; location on Bruny; employment status; and household type)
- **61 questions across ten liveability 'domains' on Bruny Island** (community; education; economy; environment; health and safety; housing; local decision making; local infrastructure; transport and mobility; recreation, culture and social life)
- **5 general questions** about life on Bruny Island
- **8 questions for concurrent planning processes**, including the Bruny Island Cat Management Program; the Bruny Island Emergency Management and Recovery Action Plan; and the Bruny Island Long-Term Water Management Strategy
- **1 question** about respondents being available for further comment and research

More information about the survey methodology, including the important role played by local community researchers, is available on the Bruny Life website: [www.brunylife.com](http://www.brunylife.com)

There were **691 survey respondents**, including **497 residents** and **194 non-residents**. People aged 13 years and older who live, work and/or own property on Bruny were eligible to complete the survey. The 2016 Census recorded approximately 739 people aged over 13 years 'usually residing' on Bruny. The large sample size (more than two-thirds of the eligible resident Census count) indicates **greater than 95% confidence** that resident survey results are accurate with less than a 4% margin of error.

#### Resident respondent demographics compared with 2016 Census

Gender	Female	Male		
2016 Census	46%	54%		
Bruny Life Survey	51%	49%		
Age (13+)	13-34	35 to 65	65 years +	
2016 Census	9%	52%	39%	
Bruny Life Survey	9%	51%	40%	
Location	North Bruny	Adventure Bay	Alonnah	Other Sth Bruny
2016 Census	31%	24%	17%	29%
Bruny Life Survey	33%	26%	17%	24%

#### Other Bruny Life Survey Demographics

Years living/staying on Bruny	0-10 years	11-20 years	20+ yrs & born on Bruny
	19%	39%	40%
Household Type	Single	Couple	Family/Multiple/Other
	21%	55%	25%
Workforce Status	Retired/Carer	Other	Employed/Self-Employed
	42%	5%	53%

#### Survey 'Scores'

Throughout this document, a score from 0-100 is reported for the response to each five-point Likert scale survey question. Responses to each question are scored '0', '25', '50', '75' and '100', totalled, and divided by the total number of responses. For ease of reference, scores are grouped in three colour-codes:

	= 60-100		= 40-59		= 0-39
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## Top scores (highest satisfaction, lowest concern, most important, etc.)

## Survey Question

93	Protection of Bruny's natural environment is a top priority	D1
90	It is very important to Islanders that children can attend primary school on Bruny	B1
89	The great majority of Bruny Islanders have reliable transport	I1
85	Most people on Bruny are highly satisfied with the quality of their housing	F1
84	Islanders feel safe living on Bruny and concerns about crime are very low	E6 E3
84	Living on Bruny is positive for your well-being	E7
84	Islanders place a lot of importance in having a strong, supportive community	A3
82	It is a priority for the Island to have a shared vision and plan for the future	G5
80	Most people on Bruny Island are satisfied with their social life	J1
80	Bruny Island is a friendly place to live	A5

## Lowest Scores: (lowest satisfaction, highest concern, least important, etc.)

23	Islanders have little confidence they can influence State Government decisions about Bruny	G3
23	There is very little confidence that newcomers can find an affordable place to rent on Bruny	F2
25	There is a high level of concern about Bruny's capacity to manage future growth in visitors	K4
29	There is low satisfaction with the environmental management of fish farming around Bruny	D3
30	There is a lack of confidence that local people can get full-time work on the Island	C2
31	Islanders believe local infrastructure is lacking (e.g. toilets; waste; footpaths)	H3 H4 H5
31	Islanders lack confidence they can influence Council decisions that impact on Bruny	G2
36	Bruny Islanders stated they often experience dangerous situations on the Island's roads	E5
36	Many Islanders believe that Bruny is 'over-regulated' in relation to building	F3
40	Many Islanders are unsatisfied with the environmental management of tourism on Bruny	D2

## Key issues where Islanders' opinions or situations are diverse

Score  
43**A1. How would you describe your level of involvement in the Bruny Island community?**

1. Not at all involved	2. Slightly involved	3. Somewhat involved	4. Involved	5. Very involved
12%	37%	25%	17%	8%

Score  
52**B2. How important is it that young people have the option to complete Year 12 without leaving Bruny?**

1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
22%	14%	22%	21%	22%

Score  
55**C1. How important is it that Bruny Island is an attractive place for business investment?**

1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
15%	13%	25%	31%	16%

Score  
58**E2: How satisfied are you with the provision of health services on Bruny Island?**

1. Very unsatisfied	2. Unsatisfied	3. Somewhat satisfied	4. Satisfied	5. Very Satisfied
8%	12%	30%	40%	9%

Score  
51**E4. How do you rate Bruny's capacity to deal with major emergencies (e.g. bushfire/major accidents)?**

1. Very low capacity	2. Low capacity	3. Moderate capacity	4. High capacity	5. Very high capacity
6%	20%	44%	26%	4%

Score  
55**G4: How satisfied are you with the way local associations represent the views of Bruny Islanders?**

1. Very unsatisfied	2. Unsatisfied	3. Somewhat satisfied	4. Satisfied	5. Very satisfied
5%	17%	40%	29%	8%

Score  
54**I3: How important is it for Bruny to have public transport options?**

1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
14%	17%	25%	26%	18%

Score  
57**I6: How satisfied are you with Bruny's ferry service?**

1. Not at all satisfied	2. Slightly satisfied	3. Somewhat satisfied	4. Satisfied	5. Very satisfied
10%	14%	27%	33%	15%

Score  
46**K1: Do you think Bruny has changed for the better, or worse, over the last five years?**

1. Much worse	2. Somewhat worse	3. About the same	4. Somewhat better	5. Much better
14%	32%	17%	28%	8%

Score  
55**K3. Is the current level of tourism activity on Bruny good or bad for the community as a whole?**

1. Very bad	2. Mostly bad	3. Good and bad	4. Mostly good	5. Very good
7%	11%	46%	26%	10%

## Introduction

The Bruny Life survey results demonstrate that Bruny remains a great place to live. It is a safe and friendly Island, where people are generally satisfied with their housing, transport and lifestyle. Bruny Islanders care deeply for the Island's environment and place great importance on having a strong, supportive community. The survey also demonstrates that Islanders are concerned about the Island's capacity to cope with recent and future change. There is uncertainty and anxiety about the impacts of the tourism and aquaculture industries on Bruny and a strong sense that decisions are made without adequate evidence, forward planning or the direct involvement of Islanders.

Change cannot be stopped or avoided, but it can be managed well and the Island can adapt in a way that enables Bruny to remain a great place to live, work and visit. First and foremost, there is an opportunity to harness the considerable skills, knowledge, experience and leadership already present on Bruny Island to proudly celebrate, build and protect our 'Bruny Life'.

It is not possible, however, for Bruny Islanders to effectively manage all the challenges facing Bruny on their own. The State Government, Kingborough Council and industry must be equal and active partners in this management. It is also not possible to manage change without resources – modest investments are recommended in infrastructure, governance, research and management to protect the environment and unique Bruny way of life and ensure the continued economic success of Bruny-based businesses.

Taking into account the results of the Bruny Life Community Survey, including comments from Islanders, and separate submissions made by local organisations, businesses and individuals, the consultant undertaking the Bruny Island Liveability Study (Mathew Fagan) recommends the following:

## Actions for State Government, Kingborough Council and Bruny Island Advisory Committee (Actions 1-5)

1. **Establish a single, formal, representative governance entity for Bruny Island** that can articulate the views of Islanders and through which State Government, Kingborough Council and industry can constructively engage with Islanders on social, economic and environmental issues. It is noted:
  - An effective and timely way to establish this entity is to expand and reform the functions of the existing Bruny Island Advisory Committee (BIAC).
  - Other approaches that achieve the same outcome in a similar timeframe (for example disbanding BIAC and establishing a new entity) could also be adopted.
  - The entity should provide formal advice to State Government and Kingborough Council on a broad range of matters related to Bruny Island.
  - The entity should meet at least once per month and could form sub-groups to deal with priority issues such as 'Health and Well-Being', 'Education', 'Visitor Management', 'Infrastructure Advisory', 'Resident Service Standards', 'Ferry Service Liaison', 'Impacts of Aquaculture' and a 'Bruny Island Plan/Vision'.
  - State Government, Kingborough Council and industry should be represented on the entity.
  - Other Bruny Island committees and groups established to liaise with government agencies (for example the Destination Action Plan Leadership Group) should be wound up and their functions transferred to the single entity.
  - The entity could be supported by a full-time executive officer/ communications role, based on Bruny Island.
  - In determining the way the new entity operates, previous proposals for a single governance entity on Bruny Island, including a 'bioregional' approach, should be considered. *(This recommendation addresses the responses to survey questions G2, G3, G5 and K4).*
2. Commence an Island-based program – reporting initially to the existing BIAC and then to the entity recommended in (1) above – to **monitor, measure and evaluate the social, economic and environmental impacts of visitors on the people and natural environment of Bruny Island**, including recommendations on the Island's 'carrying capacity'. *(This recommendation addresses the responses to survey questions C1, C2, D2, D5, H3, H4, H5, I6 and K4).*
3. **Establish a Bruny Island Infrastructure Fund**, in recognition of the impacts of the rapid increase in visitor numbers on the people and environment of Bruny Island. Allocations from this Fund should be informed by the monitoring program (recommendation 2) and advice from BIAC and/or the entity proposed in recommendation 1. Immediate infrastructure priorities highlighted during the Community Survey process include the following, *(which address responses to survey questions in section D, section E, section H and section I and were proposed by individuals or groups as part of the Bruny Life process):*

- Upgrades to the Roberts Point precinct, including measures that: (a) improve safety and access for vehicles (particularly ambulances) that need to drop off or pick up ferry passengers at times when there are long queues of traffic waiting to board the ferry at Roberts Point; (b) allow pedestrians to safely access the Roberts Point kiosk and public toilets and; (c) a vehicle pullover/interpretation area on the northern side of Main Rd that allows slower/larger vehicles to pause after disembarking the ferry and includes signage such as locations of toilets, natural/cultural attractions, 'Bruny stories', good driving behaviours, responsible waste disposal etc.
- Seal short sections of dusty gravel roads in residential areas with relatively high volumes of traffic (including from visitors) and where residents are currently being impacted from dust in their homes and water tanks. Locations include Alonnah, Adventure Bay, Lunawanna and Barnes Bay.
- Regular gravel road maintenance (grading etc.) of Coolangatta Rd from Adventure Bay to Lunawanna. This former forestry road is an important alternative route out of and into Adventure Bay (including for emergencies that may block the Adventure Bay Rd) and is currently unmaintained.
- Two new shared footpaths/cycleways. The first would connect Alonnah Pontoon with the Bruny Hotel/Alonnah Shop, including a side-loop that passes the School, Community Hall, Oval and Health Centre. The second would run from Blighs Creek to East Cove at Adventure Bay. Both would provide increased amenity and safety for residents and visitors.
- Introduce 60km per hour speed limits – and associated safety signage – on gravel roads at the northern end of the Bruny Island Main Rd, North Bruny. Consider similar for Lighthouse Road.
- Upgrade public toilets at Dennes Point, Lunawanna, Cape Bruny and Roberts Point to meet resident and visitor demand.
- Undertake an urgent analysis of current seasonal demand at the 12 existing public toilet facilities on Bruny Island (Roberts Point, Dennes Point (x2), The Neck, Adventure Bay (x2, including the 17 new toilets at East Cove), Alonnah (x3), Lunawanna, Cape Bruny Lighthouse and Cloudy Bay) to determine where additional public toilets are best located, taking into account environmental impacts; the number of visitors to localities; the responsibilities of private businesses to provide sufficient toilet facilities for patrons; and any negative impacts on residents living near proposed facilities. Provide this information to BIAC for recommendations on an implementation schedule.
- Install and service additional public rubbish bins at locations with high numbers of visitors (including seasonally) and identified problems with litter, with priority for locations where no bins are currently in place.
- Install and service additional recycling-only public rubbish bins in high traffic areas, including Roberts Point, Adventure Bay and Alonnah.
- Improve mobile phone and fixed wireless internet access in residential areas of Bruny Island and along the Bruny Island Main Rd, including for emergency management communications.
- As part of the Community Survey, a number of Bruny Islanders proposed two inter-related changes to ferry access: (a) "residents' lanes" to provide priority ferry access to residents/landowners and; (b) a ferry booking system to modulate the number and type of visitors to the Island. The Study had insufficient data to reasonably consider the impacts of these proposals on residents, non-resident landowners, businesses and other Tasmanians (including friends and family of residents, service providers and trades contractors). The collection of further information, such as average queuing times for ferry passengers in peak seasons, would help determine the appropriate scale of any changes to the current ferry arrangements. Some survey respondents suggested that Bruny Island adopt booking systems and access methods used for other islands and other ferries (for example, Lord Howe Island, Kangaroo Island, Stradbroke Island and the Daintree Ferry). However, research shows that each of these examples is significantly different to Bruny in terms of historical, social, geographic, logistical, economic and/or legal factors. It is recommended further evidence be collected (as per recommendation 2) to inform future decision-making on these proposals.

There were many other infrastructure ideas proposed by local people as part of the Community Survey process. The suggestions outlined above best addressed overall responses to the survey and are reasonably achievable in terms of cost. Some respondents suggested that a 'visitor levy' be charged in conjunction with visitors' ferry fares to fund infrastructure upgrades. This study recommends an *Infrastructure Fund* is established in recognition of visitor impacts on Bruny – it does not express a view on whether this is funded by a levy or directly by Government and/or industry, noting the latter is less complicated and arguably more efficient.

4. Establish a **Bruny Island Visitor Engagement Service**, where local people are employed to welcome visitors to Bruny; share the local vision for Bruny (including driving safely and respecting the environment and locals); and interview visitors on their exit from the Island. (*Addresses responses to survey questions C2, E5, G5, K4*).
5. Concern has been expressed by many survey respondents that the number of visitors to Bruny is resulting in reduced access or quality of services to residents (for example, ferry access, health services, emergency services, potable carted water, road standards). It is recommended that BIAC (or the entity proposed in recommendation 1) work with relevant State Government agencies, Council and service operators to **collect objective evidence of service levels/usage with a view to ensuring that residents' service levels are maintained** and, If necessary, investment in services is increased to meet visitor demand. (*Addresses responses to survey questions E2, E4, G2, G3 and section H and section I*)

## Actions for BIAC, local community organisations and Bruny-based businesses (Actions 6-11)

6. Existing Bruny Island organisations, including the Bruny Island Community Association, Friends of North Bruny, Bruny Island Environment Network and Bruny Island Advisory Committee (BIAC), should reach agreement on ways to promote and support a skilled and diverse group of people, including young people, to be the Island's representatives on the entity proposed in recommendation 1. All organisations should work collectively and with unity of purpose. The entity proposed in recommendation 1 should engage Islanders of all ages and from all locations through multiple methods, including more informal processes. This will enable a strong, informed and representative Island voice to State Government and Kingborough Council. *(addresses responses to survey questions A4, G2, G3, G4, G5, K1, K4)*
7. An integrated education/cultural precinct could be established at Alonnah, incorporating the school, the community library, the history room, the Online Access Centre, the Mens' Shed and the development plans for the Alonnah Hall (\$150,000 already committed by State Government). Adult education classes could be delivered through this precinct. *(addresses responses to survey questions B3, B4 and J3)*
8. Local businesses could commit to a Bruny Island Emergency Management Charter, with agreement to support their employees to participate in the local volunteer fire brigades, SES and ambulance services, including release from work and coverage of some out-of-pocket expenses incurred by volunteers. *(addresses responses to survey questions E2, E4, K3, L4)*
9. A Partnership Agreement between BIAC (and/or the entity proposed in recommendation 1) and Tassal, Huon Aquaculture and State Government (with the later inclusion of any other aquaculture company operating close to Bruny) could improve environmental outcomes, increase transparency of operations and increase the local social and economic benefits from the fish farming industry on and around Bruny. *(addresses responses to survey question D3)*
10. The proposed monitoring program (recommendation 2) and the Visitor Engagement Service (recommendation 4) involve Bruny Islanders having to work at Kettering and Roberts Point on a daily basis. These workers could be transported by buses that are already located on the island, and these buses could also be available to other residents to provide a limited form of public transport to and from the ferry on a daily basis. *(addresses responses to survey question I6)*
11. Through the three phases of the Bruny Island Liveability Study (from November 2017 to April 2018), including the Bruny Life Community Survey, local people have made hundreds of suggestions on ways to improve, reform or innovate on Bruny Island. Many of these suggestions are documented in Appendix A. The results of the Community Survey and the suggestions made in Appendix A should help guide the work of BIAC and/or the entity proposed in recommendation 1.

### A brief note on the approach to recommendations

Actions to implement all recommendations 1-11 could take place in the 2018 calendar year. Recs. 1-4 and 10, will require government and/or industry funding to be implemented. All other actions can be implemented through existing resources, assets, organisational cooperation, policy change and goodwill.

The Study has not made recommendations that involve increased regulation, restrictions on movement, or where an action has possible perverse consequences for residents (e.g. placing a 'cap' on visitor numbers; establishing a residents' lane for the ferry; or introducing a booking system for access to Bruny). Such proposals are best considered after careful examination of the evidence for their need (rec. 2), by those who will take responsibility for all consequences of their implementation (rec. 1) and with informed regard to the best possible use of available resources (recs. 3 and 5).

The Study has not duplicated recommendations on health and aged care made through the recent 'Bruny Island Community Aged Living Report' or pre-empted actions that may emerge from the Bruny Island Cat Management Program; the Bruny Island Emergency Management and Recovery Action Plan; or the Bruny Island Long-Term Water Management Strategy.



Score  
43**A1. How would you describe your level of involvement in the Bruny Island community?**

1. Not at all involved	2. Slightly involved	3. Somewhat involved	4. Involved	5. Very involved
12%	37%	25%	17%	8%

Score  
72**A2. How confident are you of getting support from other Bruny Islanders in a time of difficulty?**

1. Not at all confident	2. Slightly confident	3. Somewhat confident	4. Confident	5. Very confident
2%	8%	20%	41%	29%

Score  
84**A3. How important is it to you that Bruny has a strong, supportive community?**

1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
1%	2%	8%	40%	49%

Score  
64**A4. How effective do you think Bruny Islanders are at 'working together'?**

1. Not at all effective	2. Slightly effective	3. Somewhat effective	4. Effective	5. Very effective
3%	7%	35%	39%	16%

Score  
80**A5. On the whole, how friendly do you find Bruny Islanders?**

1. Very unfriendly	2. Unfriendly	3. Somewhat friendly	4. Friendly	5. Very friendly
0%	0%	14%	51%	35%

Score  
74**A6. Overall, how do your interactions with the community on Bruny affect your life?**

1. Very negatively	2. Negatively	3. Neutral or no impact	4. Positively	5. Very positively
0%	2%	20%	58%	19%

**Notable differences between 'all respondent' scores and 'resident only' scores**

- Residents are more involved in the community (Resident Only Score for A1=49)

**General Observations**

- The level of involvement of residents in their local community is lower than might be expected. About half the population is only 'slightly involved' or 'not at all involved'.
- Bruny Islanders are supportive of one another and highly value this aspect of the community.
- More than 40% of respondents have at least some reservations about the current capacity of Islanders to 'work together', including perceived differences between 'North and South', 'Adventure Bay and Alonnah' and long-term residents and 'newcomers'.
- Overall, Bruny is a very friendly place and interactions within the community are overwhelmingly positive.

**Associated recommendations**

- Recommendations 6 and 11



Score 90	<b>B1. How important is it that children can attend primary school on Bruny?</b>				
	1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
	3%	1%	3%	19%	73%
Score 52	<b>B2. How important is it that young people have the option to complete Year 12 without leaving Bruny?</b>				
	1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
	22%	14%	22%	21%	22%
Score 49	<b>B3. How confident are you that a person living on Bruny could access TAFE and University courses?</b>				
	1. Not at all confident	2. Slightly confident	3. Somewhat confident	4. Confident	5. Very confident
	16%	19%	29%	24%	11%
Score 66	<b>B4. How important is it that short courses are regularly delivered on Bruny Island?</b>				
	1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
	5%	10%	24%	37%	24%
Score 52	<b>B5. Overall, how does the current level of access to education on Bruny affect your life?</b>				
	1. Very negatively	2. Negatively	3. Neutral or no impact	4. Positively	5. Very positively
	2%	4%	82%	9%	3%

#### Notable differences between 'all respondent' scores and 'resident only' scores

- None

#### General Observations

- It is very important to Islanders that children attend primary school on Bruny.
- The community has divided opinion on whether it's important for young people to have the option of staying on Bruny to complete Year 12 – some people think current options should be increased (e.g. Year 11 and 12 made available at Woodbridge High School), while others think it's important for young Islanders to spend Year 11 and 12 in Hobart to get a higher quality education, broader experiences and wider social interaction.
- Most respondents have less than full confidence in Islanders being able to access TAFE and University from the Island (even with online options) and majority support for adult education short courses delivered on Bruny.
- Overall, access to education on Bruny has little impact on most people's lives.

#### Associated recommendations

- Recommendation 7

Score

55

**C1. How important is it that Bruny Island is an attractive place for business investment?**

1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
15%	13%	25%	31%	16%

Score

30

**C2. How confident are you that a working-age person could get full-time, paid work on Bruny?**

1. Not at all confident	2. Slightly confident	3. Somewhat confident	4. Confident	5. Very confident
32%	31%	23%	11%	3%

Score

66

**C3. How would you rate Bruny Island as a place to run a successful small or medium business?**

1. Very bad	2. Bad	3. Neutral	4. Good	5. Very good
1%	7%	33%	48%	11%

Score

40

**C4. How would you describe the cost of living on Bruny Island?**

1. Very high cost	2. High cost	3. Normal cost	4. Low cost	5. Very low cost
5%	41%	43%	9%	1%

Score

58

**C5. Overall, how does the current strength of the Bruny local economy affect your life?**

1. Very negatively	2. Negatively	3. Neutral or no impact	4. Positively	5. Very positively
2%	6%	55%	31%	6%

**Notable differences between 'all respondent' scores and 'resident only' scores**

- Residents are slightly more confident that a person could get full-time work on Bruny (Resident Only Score C2=33), but this score remains very low.

**General Observations**

- About half the population think that Bruny should be attractive for business investment, but a significant minority do not. Some people had reservations about the 'type' of business investment that Bruny attracts.
- Despite the strength of the local economy, there is still very low confidence that locals can get full-time work on Bruny. Many local jobs are casual and some jobs are seasonal. Some people report that full-time work can be achieved by having more than one job.
- While a majority of respondents believe that Bruny is a good place to run a successful small or medium business, some people believe this is restricted to a narrow range of industries. Others report that improved internet access is required to enable more 'work-from-home' business opportunities.
- Bruny is perceived as a high cost place to live due to costs of transport, freight and lack of retail competition, although some respondents report this is offset by lower costs in other areas.
- While many respondents benefit from a strong local economy, a majority report no impact. This may be due in part to the high number of retirees on Bruny.

**Associated recommendations**

- Recommendation 4

Score  
93**D1. How important is it to protect Bruny Island's natural environment?**

1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
0%	1%	4%	14%	80%

Score  
40**D2. How satisfied are you with the environmental management of tourism on Bruny?**

1. Very unsatisfied	2. Unsatisfied	3. Somewhat satisfied	4. Satisfied	5. Very satisfied
19%	28%	32%	18%	3%

Score  
29**D3. How satisfied are you with the environmental management of fish farming around Bruny?**

1. Very unsatisfied	2. Unsatisfied	3. Somewhat satisfied	4. Satisfied	5. Very satisfied
36%	28%	22%	11%	2%

Score  
64**D4. How satisfied are you with the environmental management of land-based farming on Bruny?**

1. Very unsatisfied	2. Unsatisfied	3. Somewhat satisfied	4. Satisfied	5. Very satisfied
3%	5%	35%	47%	10%

Score  
43**D5. What impact has the increase in visitors coming to Bruny had on your 'peace and quiet'?**

1. Very high impact	2. High impact	3. Moderate impact	4. Low impact	5. Very low impact
20%	19%	33%	21%	6%

Score  
47**D6. How concerned are you about the future impacts of climate change on Bruny?**

1. Very concerned	2. Quite concerned	3. Somewhat concerned	4. Slightly concerned	5. Not at all concerned
20%	21%	25%	20%	14%

Score  
62**D7. Overall, how do you feel about the current state of Bruny's natural environment?**

1. Very negative	2. Negative	3. Neutral	4. Positive	5. Very positive
4%	13%	23%	50%	10%

**Notable differences between 'all respondent' scores and 'resident only' scores**

- Residents experience more impact on their 'peace and quiet' (Resident Only Score for D5=40)

**General Observations**

- Protection of the environment is a top priority for Bruny Islanders and there are major concerns about the environmental management of tourism and fish farming on and around Bruny. In contrast, there is a high level of satisfaction with the environmental management of land-based farming.
- The increase in visitors is having a significant impact on many people's 'peace and quiet' (which is a major reason people choose to live on Bruny).
- Concerns about climate change appear similar to surveys of the broader Australian community.
- While a majority of Islanders remain positive about the environment, a number selected 'neutral' for question D7 due to their uncertainty about the future state of Bruny's environment.

**Associated recommendations**

- Recommendations 1, 2, 3, 4 and 9

Score  
70**E1. How would you describe your personal health?**

1. Serious health issues	2. Some health issues	3. Somewhat healthy	4. Healthy	5. Very healthy
2%	12%	13%	48%	25%

Score  
58**E2. How satisfied are you with the provision of health services on Bruny Island?**

1. Very unsatisfied	2. Unsatisfied	3. Somewhat satisfied	4. Satisfied	5. Very Satisfied
8%	12%	30%	40%	9%

Score  
80**E3. How concerned are you about crime on Bruny?**

1. Very concerned	2. Quite concerned	3. Somewhat concerned	4. Slightly concerned	5. Not at all concerned
2%	5%	13%	37%	44%

Score  
51**E4. How do you rate Bruny's capacity to deal with major emergencies (e.g. bushfire/major accidents)?**

1. Very low capacity	2. Low capacity	3. Moderate capacity	4. High capacity	5. Very high capacity
6%	20%	44%	26%	5%

Score  
36**E5. How often do you experience dangerous situations when driving on Bruny roads?**

1. Very often	2. Often	3. Sometimes	4. Rarely	5. Never
22%	27%	37%	12%	2%

Score  
84**E6. Overall, how safe do you feel living on Bruny?**

1. Very unsafe	2. Unsafe	3. Somewhat safe	4. Safe	5. Very safe
1%	1%	7%	45%	47%

Score  
84**E7. Overall, how does living on Bruny affect your well-being?**

1. Very negatively	2. Negatively	3. Neutral or no impact	4. Positively	5. Very positively
0%	1%	8%	44%	46%

**Notable differences between 'all respondent' scores and 'resident only' scores**

- Residents are more likely to experience dangerous situations on Bruny's roads (Resident Only Score E5=32)

**General Observations**

- Overall, Bruny is a safe place to live and living on Bruny has a very positive impact on peoples' well being.
- About half of the Island is satisfied with the provision of health services on the Island. Dissatisfaction with local health services derive from the lack of a regular, full-time doctor; the recent discontinuation of preventative health programs; and perceived limitations on local staff to make 'local decisions'.
- Many people experience dangerous situations on Bruny's roads, with most concerns emanating from the driving behaviours of visiting drivers.
- There are concerns about the impact of visitors on volunteer emergency services, the health centre and local police.

**Associated recommendations**

- Recommendations 4, 5, 8

Score  
85**F1. What is your level of satisfaction with your personal housing situation on Bruny?**

1. Very unsatisfied	2. Unsatisfied	3. Somewhat satisfied	4. Satisfied	5. Very satisfied
3%	2%	8%	26%	61%

Score  
23**F2. How confident are you that a family moving to Bruny could find affordable housing to rent?**

1. Not at all confident	2. Slightly confident	3. Somewhat confident	4. Confident	5. Very confident
46%	27%	17%	8%	2%

Score  
36**F3. How would you describe the current regulations for building on Bruny?**

1. Much too regulated	2. Too regulated	3. About right	4. Too unregulated	5. Much too unregulated
20%	28%	41%	8%	2%

Score  
49**F4. How has the growth in short-stay accommodation on Bruny (e.g. Airbnb) affected your life?**

1. Very negatively	2. Negatively	3. Neutral or no impact	4. Positively	5. Very positively
4%	16%	64%	12%	4%

Score  
52**F5. How do current property prices for residential housing on Bruny affect your life?**

1. Very negatively	2. Negatively	3. Neutral or no impact	4. Positively	5. Very positively
2%	6%	75%	14%	2%

**Notable differences between 'all respondent' scores and 'resident only' scores**

- None

**General Observations**

- Bruny Islanders are generally very satisfied with their housing situations, although a number of recent arrivals are living in sub-standard arrangements due to the lack of long-term rental housing.
- Nearly half of the population believes that Bruny is over-regulated when it comes to building, with considerable frustration at the cost and time associated with residential building. Conversely, a number of people report there is a lack of enforcement of non-compliant building, which increases the frustration for those who have been unable to proceed with building or borne additional costs to do so.
- The great majority of Islanders experience neutral, or positive, impacts from the growth of short-stay accommodation on the island, although many acknowledge this has led to a shortage of long-term rentals for other people.
- Most people perceive no impact from the rise in property prices on Bruny. A small number feel they are now 'priced-out' of the property market.

**Associated recommendations**

- Recommendations 5

Score  
65**G1. How would you describe your level of interest in local decision making on Bruny?**

1. Not at all interested	2. Slightly interested	3. Somewhat interested	4. Interested	5. Very interested
2%	12%	30%	37%	19%

Score  
31**G2. How confident are you that Islanders can influence Council decisions affecting Bruny?**

1. Not at all confident	2. Slightly confident	3. Somewhat confident	4. Confident	5. Very confident
30%	31%	26%	12%	2%

Score  
23**G3. How confident are you that Islanders can influence State Government decisions affecting Bruny?**

1. Not at all confident	2. Slightly confident	3. Somewhat confident	4. Confident	5. Very confident
44%	29%	18%	8%	1%

Score  
55**G4. How satisfied are you with the way local associations represent the views of Bruny Islanders?**

1. Very unsatisfied	2. Unsatisfied	3. Somewhat satisfied	4. Satisfied	5. Very satisfied
5%	17%	40%	29%	8%

Score  
82**G5. How important is it for the Bruny community to have a shared vision and plan for the future?**

1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
2%	3%	9%	36%	50%

Score  
43**G6. Overall, how do you feel about the way that decisions affecting Bruny are currently made?**

1. Very negative	2. Negative	3. Neutral	4. Positive	5. Very positive
8%	30%	46%	15%	2%

**Notable differences between 'all respondent' scores and 'resident only' scores**

- Residents are less satisfied with local associations (Resident Only Score for G4=52)

**General Observations**

- A majority of Bruny Islanders are interested in local decision-making. This is not currently reflected in the active membership of local associations or attendance at their regular meetings, but is evidenced in the strong response to this survey, attendance at 'issue-based' forums and active debates on local issues via social media.
- There is currently very little confidence that Bruny Islanders can influence local or state government decisions that directly impact on the Island.
- There is very strong support for Bruny to have a shared vision and plan for the future. A small number of people question whether it is achievable given the capacity of local associations.
- A number of people made free text comments that there "are too many associations on Bruny". Others are dissatisfied because they believe those who speak on behalf of the community often do not represent a majority view.

**Associated recommendations**

- Recommendations 1, 2, 3, 5, 6, 11

Score  
61**H1. How would you describe access to mobile phone services from your house on Bruny?**

1. No access	2. Limited access	3. Moderate access	4. Satisfactory access	5. High quality access
7%	17%	16%	41%	18%

Score  
74**H2. How confident are you in accessing enough clean water to meet your Bruny household's needs?**

1. Not at all confident	2. Slightly confident	3. Somewhat confident	4. Confident	5. Very confident
4%	7%	14%	41%	34%

Score  
31**H3. Do you think Bruny has sufficient public toilets?**

1. Not at all	2. Not in most places	3. In some places	4. In most places	5. Nearly everywhere
37%	21%	25%	14%	3%

Score  
34**H4. Do you think Bruny has sufficient waste management services?**

1. Not at all	2. Not in most places	3. In some places	4. In most places	5. Nearly everywhere
29%	28%	26%	15%	3%

Score  
33**H5. Do you think there are sufficient footpaths and bike paths in and around Bruny's villages?**

1. Not at all	2. Not in most places	3. In some places	4. In most places	5. Nearly everywhere
28%	30%	27%	11%	4%

Score  
53**H6. How would you describe access to the internet from your home on Bruny?**

1. No access	2. Limited access	3. Moderate access	4. Satisfactory access	5. High quality access
12%	22%	21%	33%	12%

Score  
51**H7. How does the current state of Bruny's essential services and local infrastructure affect your life?**

1. Very negatively	2. Negatively	3. Neutral or no impact	4. Positively	5. Very positively
2%	17%	56%	22%	3%

**Notable differences between 'all respondent' scores and 'resident only' scores**

- None

**General Observations**

- There is a majority view that Bruny has insufficient public toilets and waste management services to meet the additional demands of increased visitors. There is also a majority view that increased traffic in residential areas requires new or better footpaths and bikepaths for safety and amenity.
- Access to mobile phone and internet services remain sub-standard for many Bruny Islanders.
- A relatively high number of residents (20%) and landowners (17%) used water carters in the last 12 months (see also question L7 below), which impacts on their perceptions of household water security. There are concerns that commercial use of local bores via water carters may impact on domestic water security.

**Associated recommendations**

- Recommendations 2, 3



Score  
89

I1. How reliable is your main form of personal transport on Bruny?				
1. Unreliable	2. Often unreliable	3. Somewhat reliable	4. Mostly reliable	5. Very reliable
0%	1%	5%	27%	67%

Score  
64

I2. How confident are you that you can travel to and from Bruny when you need to?				
1. Not at all confident	2. Slightly confident	3. Somewhat confident	4. Confident	5. Very confident
9%	12%	20%	32%	27%

Score  
57

I3. How satisfied are you with Bruny's ferry service?				
1. Not at all satisfied	2. Slightly satisfied	3. Somewhat satisfied	4. Satisfied	5. Very satisfied
10%	14%	27%	33%	15%

Score  
56

I4. Do you think the condition of Bruny's road network is adequate?				
1. Not at all	2. Not in most places	3. In some places	4. In most places	5. Nearly everywhere
9%	9%	39%	32%	10%

Score  
63

I5. Do you think current speed limits on Bruny roads are appropriate?				
1. Not at all	2. Not in most places	3. In some places	4. In most places	5. Nearly everywhere
8%	8%	28%	34%	22%

Score  
54

I6. How important is it for Bruny to have public transport options?				
1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
14%	17%	25%	26%	18%

Score  
46

I7. How do you feel about the current state of Bruny's transport services and road infrastructure?				
1. Very negative	2. Negative	3. Neutral	4. Positive	5. Very positive
7%	27%	44%	21%	2%

#### Notable differences between 'all respondent' scores and 'resident only' scores

- None

#### General Observations

- Most Bruny Islanders enjoy good transport and mobility due to having reliable private cars.
- There are split views about the ferry service. Half of the population is satisfied with the current service. Of those who are unsatisfied, most are seeking greater certainty they can get onto a scheduled ferry without onerous wait times, particularly for morning departures from Bruny and afternoon/evening from Kettering.
- Most concerns about road safety relate to visitors driving too slow or unpredictably, although there are concerns about speed limits on the Lighthouse Rd, Adventure Bay Rd and gravel roads on North Bruny.
- There are split views about public transport, with a number of people believing it could never be economically viable. Young people and older people are more likely to view it as important.

#### Associated recommendations

- Recommendations 2, 3, 4 and 10

Score  
80

J1. How satisfied are you with your 'social life' on Bruny?				
1. Unsatisfied	2. Mostly unsatisfied	3. Sometimes satisfied	4. Mostly satisfied	5. Satisfied
0%	4%	16%	35%	44%

Score  
70

J2. Do you think the number of organised sport and recreation activities on Bruny is sufficient?				
1. Not at all	2. Mostly not	3. Sometimes	4. Mostly sufficient	5. Sufficient
2%	9%	25%	35%	29%

Score  
67

J3. How important is it for arts and cultural events to be regularly held on Bruny?				
1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
6%	8%	22%	37%	26%

Score  
65

J4. How easy is it to pursue your favourite recreation activities on Bruny?				
1. Very easy	2. Mostly easy	3. Same as other places	4. Mostly difficult	5. Very difficult
24%	31%	29%	13%	3%

Score  
72

J5. How important is it for Bruny to acknowledge and respect the Island's Indigenous culture?				
1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
6%	11%	15%	26%	42%

Score  
64

J6. Overall, how does access to recreation, culture and social events on Bruny affect your life?				
1. Very negatively	2. Negatively	3. Neutral or no impact	4. Positively	5. Very positively
1%	4%	44%	42%	10%

**Notable differences between 'all respondent' scores and 'resident only' scores**

- None

**General Observations**

- This is the only liveability domain where all the scores are majority positive.
- Young people report less satisfaction with their social life and the number of sport and recreation activities and more difficulty pursuing their favourite recreation activities.
- There is strong support for acknowledging and respecting Bruny Island's Indigenous culture.

**Associated recommendations**

- Recommendations 4, 7, 10

Score  
46

K1. Do you think Bruny has changed for the better, or worse, over the last five years?				
1. Much worse	2. Somewhat worse	3. About the same	4. Somewhat better	5. Much better
14%	32%	17%	28%	8%

Score  
74

K2. How likely is it that you will move away from Bruny in the next five years?				
1. Highly likely	2. Likely	3. Unsure	4. Unlikely	5. Highly unlikely
5%	6%	17%	29%	42%

Score  
55

K3. Is the current level of tourism activity on Bruny good or bad for the community as a whole?				
1. Very bad	2. Mostly bad	3. Good and bad	4. Mostly good	5. Very good
7%	11%	46%	26%	10%

Score  
25

K4. How concerned are you that Bruny will not be able to cope with future increases in tourism visitors?				
1. Very concerned	2. Concerned	3. Somewhat concerned	4. Slightly concerned	5. Not at all concerned
47%	25%	13%	11%	4%

Score  
57

K5. Do you think Bruny should aim for a bigger or smaller permanent population over the next 10 years?				
1. Much smaller	2. Smaller	3. About the same	4. Bigger	5. Much bigger
1%	3%	65%	28%	3%

#### Notable differences between 'all respondent' scores and 'resident only' scores

- None

#### General Observations

- The population of Bruny is fairly evenly split over whether things have changed for better or worse over the past five years. While many views relate to the increase in visitors (with negatives including impacts on 'peace and quiet' and positives including increase in 'things to do' and improved infrastructure), some people believe things have 'changed for the worse' due to reasons unrelated to visitors – including 'newcomers who impose their views' and 'increased rules and regulations'.
- Likewise, the community has mixed feelings about the current level of tourism, although twice as many people think it is 'good' or 'mostly good' than 'bad' or 'mostly bad'.
- However, when it comes to future expansion of the tourism industry on Bruny, the community is clearly concerned about the capacity of the Island to cope.
- Nearly a third of Islanders think the permanent population of the Island should increase (including to help sustain local services and businesses), but most people want it to stay about the same.
- A minority of the population is considering leaving in the next five years, with the main reasons being access to work opportunities; access to health and aged care services; and access to education. A small number cited the growth in visitor numbers as a reason for leaving the Island.

#### Associated recommendations

- Recommendations 1, 2, 3, 4, 5, 6, 7, 11

## L: Questions for concurrent planning processes on Bruny Island

### Bruny Island Cat Management Program

Score  
89

L1. How important is it to manage the impact of cats on Bruny Island (e.g. for wildlife, agriculture)?				
1. Not at all important	2. Slightly important	3. Somewhat important	4. Important	5. Very important
2%	3%	7%	14%	74%

Score  
89

L2. Describe your level of support for the eradication of feral cats on Bruny Island?				
1. Do not support	2. Slightly support	3. Somewhat support	4. Support	5. Strongly support
2%	2%	6%	15%	74%

Score  
85

L3. Describe your level of support for by-laws requiring responsible management of pet cats on Bruny?				
1. Do not support	2. Slightly support	3. Somewhat support	4. Support	5. Strongly support
4%	3%	6%	20%	66%

### Bruny Island Emergency Management and Recovery Action Plan

Score  
62

L4. How confident are you of surviving a bushfire emergency at your Bruny property?				
1. Not at all confident	2. Slightly confident	3. Somewhat confident	4. Confident	5. Very confident
9%	10%	26%	36%	20%

L5. Do you currently have a written personal emergency management plan for your Bruny property?		
Yes	No	
13%	87%	

### Bruny Island Long Term Water Management Strategy

L6. What sources of domestic water are used at your Bruny property?				
Rainwater	Water Carter	Own Bore	Dam	Other
98%	17%	4%	10%	7%

L7. What's the capacity (in Litres) of the domestic water tanks at your Bruny property?				
Less than 5000l	5000-10,000l	10,001-20,000l	20,0001-50,000l	More than 50,000l
7%	18%	25%	37%	11%

L8. In the last 12 months, how many times did a water carter deliver water to your Bruny property?				
None	1-2 times	3-5 times	6-8 times	More than 8 times
83%	13%	3%	0%	1%

#### Notable differences between 'all respondent' scores and 'resident only' scores

- Residents are more likely to have a written personal emergency management plan (Resident Only Score for L5=16%)
- Residents have larger tanks (18% less than 10,000 l), but are more likely to use a water carter (20%)

#### General Observations

- The researchers associated with these three concurrent plans will make observations and recommendations.

## Appendix A

Respondent comments *in the following order*:

Section A: Comments about 'community' (11 pages)

Section B: Comments about 'education' (11 pages)

Section C: Comments about 'economy and employment' (12 pages)

Section D: Comments about 'environment' (19 pages)

Section E: Comments about 'health and safety' (15 pages)

Section F: Comments about 'housing' (11 pages)

Section G: Comments about 'local decision making' (10 pages)

Section H: Comments about 'infrastructure and services' (13 pages)

Section I: Comments about 'transport and mobility' (16 pages)

Section J: Comments about 'recreation, culture, social life' (6 pages)

Section K: General comments about life on Bruny (14 pages)

Section L: Comments about concurrent planning (8 pages)

### *Note:*

- Comments within each section are presented in a random order.
- Comments have not been included if they identified the respondent making the comment or referred negatively to a specific person.