

Appendix two

Survey results

Summary

Survey results showed that respondents believe density to be an issue that has become increasingly important and will continue to be very important to the future success of the planet.

Respondents highlighted the key advantages of density as being enhanced liveability, vibrancy, sustainability and efficiency. Good infrastructure was chosen as the most important factor in creating good density – selected by three quarters of respondents. There was no clear answer as to the most important reason for densifying – environmental, social and economic benefits were all seen as important. Strong examples of ‘best practice’ cities emerged – in particular London, Paris, New York, Hong Kong and Singapore.

Concerns about density were primarily based around liveability issues – overcrowding, pollution and congestion.

Q1

In your professional opinion over the last five years has the issue of density become

Not important at all	Less important	About the same	More important	Critical	Total	Weighted Average
0.52%	1.03%	9.28%	70.10%	19.07%		
1	2	18	136	37	194	4.06

Q2

Is it your impression that cities globally have been getting more or less dense over the course of your career?

Answer Choices	Responses
More	87.63% 170
Less	5.15% 10
About the same	7.22% 14
Total	194

Q3

Is it your impression that cities in Europe have been getting more dense or less dense over the course of your career?

Answer Choices	Responses
More	72.11% 137
Less	4.74% 9
About the same	23.16% 44

Q4

If you answered that you think European cities are becoming more dense, why is this?

Answer Choices	Responses
Population growth	57.45% 81
Changing resident/lifestyle preferences	73.76% 104
Changing business preferences/needs	38.30% 54
Changing investment preferences	23.40% 33
Responses Other (please specify) included:	14.18% 20
Answers given under "Other (please specify)" above included:	
<ul style="list-style-type: none"> - immigration/migration - public sector focus on city centre regeneration and re-population - demographic changes/household expansion - green belt legislation or similar 	

Q5

How Important is Increasing Urban Density to the Future Success of Cities around the Globe?

Not important at all	Not very important	Quite important	Very important	Critical	Total	Weighted Average
1.05%	4.19%	19.90%	48.69%	26.18%		
2	8	38	93	50	191	3.95

Q6

Which of the following do you think is the strongest argument for increasing urban density?

Answer Choices	Responses
Environmental, eg reduced congestion and emissions, reduced energy consumption, protection of rural land	47.94% 93
Social, eg shorter commutes, more vibrant city life, safer communities	52.06% 101
Economic, eg increased productivity and innovation; agglomeration efficiencies	41.24% 80
Investment, eg creation of value for infrastructure investment, increased property values	14.95% 29
Responses Other (please specify)	7.22% 14

Answers given under "Other (please specify)" above included:

- all of the above/combination of answers
- lack of available sites
- transportation
- concentration of decisions
- creates critical mass for small and medium businesses to thrive
- depends on the city

Q7

How would you describe the outcomes of successful density? You can select more than one option or add one of your choosing

Answer Choices	Responses
Liveability	78.35% 152
Long term economic growth	52.58% 102
No or little social unrest	23.20% 45
Well connected	56.70% 110
Thriving 24 hours a day	25.77% 50
Mixed use of land and buildings	60.82% 118
Compact urban districts	39.18% 76
Buzz on the streets	27.32% 53
Responses Other (please specify)	12.89% 25
Answers given under “Other (please specify)” above included: <ul style="list-style-type: none"> - reduced dependence on automobiles/more transport options - affordable/diverse housing choice - efficient use of land and resources - green space in urban districts resilience and adaptability 	

Q8

Which of the following do you think is the most important reason for people resisting density? Please select your top three choices

Answer Choices	Responses
Concerns about overcrowding and loss of privacy	62.69% 121
Concerns about motor vehicle traffic and congestion	49.22% 95
Concerns about lost property value	8.81% 17
Concerns about deteriorating affordability	16.58% 32
Fear of crime	20.21% 39
Concerns about noise/air pollution	44.56% 86
Concerns about loss of green space	49.74% 96
Concerns about over-burdening public services, eg schools, transport	33.16% 64
Concerns about social mix	20.73% 40
Responses Other (please specify)	8.81% 17

Answers given under "Other (please specify)" above included:

- loss of amenity
- fear of change in general
- negative perceptions and perception that density = high rise
- lack of exposure to good examples
- security (eg fire, earthquakes)
- loss of way of life

Q9

Can you give examples of cities which have created successful density?

*In Europe – Most common response = **London***

Three most common responses:

London = 48.18% respondents

Paris = 30.66% respondents

Barcelona = 18.25% respondents

*In North America – Most common response = **New York***

Three most common responses:

New York = 63.96% respondents

San Francisco = 21.62% respondents

Boston = 20.72% respondents

*In Asia – Most common response = **Singapore***

Three most common responses:

Singapore = 64.81% respondents

Hong Kong = 43.54% respondents

Tokyo = 32.41% respondents

*Rest of World – Most common response = **Sydney***

Three most common responses:

Sydney = 34.09% respondents

Melbourne = 18.18% respondents

Rio de Janeiro = 13.64% / Buenos Aires = 13.64% respondents

Q10

What is most needed to create successful density?

Answer Choices	Responses
Flexible planning conditions	52.33% 101
Good infrastructure	79.79% 154
Technology	25.39% 49
More people involved in and understanding urban design	36.27% 70
Incentives for citizens and local governments to accept density	28.50% 55
Better public education	26.94% 52
Responses Other (please specify)	9.33% 18

Answers given under "Other (please specify)" above included:

- political will and leadership
- effective planning
- right land ownership and tax conditions
- better/appropriate design
- participation
- affordability

Q11

Who needs to lead the density debate?

Answer Choices	Responses
Politicians	18.04% 35
The real estate industry	15.98% 31
Business leaders	3.61% 7
Civic and community leaders	21.65% 42
Media	1.55% 3
Experts	8.25% 16
Citizens	3.61% 7
Everyone	20.10% 39
Responses Other (please specify)	7.22% 14
Total	194
Answers given under "Other (please specify)" above included:	
- universities	
- scientists	
- combination of the above	
- landscape architects, urban planners and climate designers	

Q12

What do you like most about density in one word?

Most common answers:

Efficiency (14.44%)

Vibrancy / Buzz (11.11%)

Liveability (6.67%)

Sustainability (5.56%)

Q13

What is your greatest fear about density in one word?

Most common answers:

Overcrowding (14.75%)

Congestion (10.38%)

Infrastructure (5.46%)

Pollution (5.46%)

Liveability (3.83%)

Safety / Security (3.83%)

Q14

Which city has dealt best with density in your opinion and why?

In Europe, most common answers:

London (38.3%)

Paris (12.5%)

Barcelona (9.17%)

Copenhagen (6.67%)

Amsterdam (6.67%)

Berlin (5%)

Frankfurt (4.17%)

Munich (3.33%)

Elsewhere, Most common answers :

Singapore – 31.25%

New York – 19.64%

Hong Kong 11.61%

Tokyo 7.14%

Vancouver 6.25%

Q15

Which major city in the world would you say is the least dense?

Most common answer = **Los Angeles**

Q16

Any other points you wish to make about density?

A selection of responses are given below, please contact ULI for full details of all responses.

- *Unfortunately high density is always associated with high rise developments. There needs to be a better understanding that areas in Mayfair and Central Barcelona provide very dense urban living!*
- *It encourages a more disciplined approach to land use, which hopefully results in higher quality development.*
- *Not optional.*
- *Need to ensure the debate is about all the benefits and issues to be addressed not just about the emotive issues around scale and over-development.*
- *Build higher not closer.*
- *We must sell the benefits of urban densification to the younger (under 40) generation who are more savvy, enamoured and better educated through their own travels. So an easier place to start the conversation. And enlist them to stand up. The cities of the future belong more to them, and they should rightfully claim ownership.*
- *If it is managed well, its benefits can be captured to address population growth in every city and country. If it is not managed properly, it will create more economic, social, environmental, and political issues. Better manage it early as soon as possible.*
- *Higher density has to embody quality of place.*
- *Density is good to have when achieved through strategic design and correct implementation. Successful execution demands futureproof design and patience. Final users are the citizens themselves, thus they should not be left out of the process. Sharing visions and ideas between state and community may be the only viable way forward.*
- *Density on its own is not the answer. Intelligent densification around transport hubs to create distinct communities is the answer to urbanisation. Everyone wants amenities and convenience as well as access to open and green spaces. These need to be balanced in order to avoid uncontrolled urbanisation.*
- *Height restrictions/ floor area ratios are among the biggest constraints on promoting density.*
- *Increasing urban density is one of the single biggest things we can do to use resources more efficiently and combat climate change.*
- *Density per se is not a good thing or a bad thing. Density can be awful, but it can also be amazing. The ULI is the obvious organisation to drive the debate on what makes good/bad, and to really capture and articulate the societal and investment value of good density.*
- *Density creates strong cultural and social bonding.*
- *Social involvement and education is key.*
- *The survey should have included some definition of what you mean by "density" as well as a definition of the word "city." Both of these terms are used in various different ways, creating extreme confusion, of often leading to very different conclusions.*
- *Density is a complicated issue not a magic bullet: regulations often prevent higher densities where density is appropriate and force it where it is inappropriate. In general rising prosperity leads to LOWER density because of income elasticity of demand for space. But agglomeration economies encourage density as the value of accessibility increases.*

Q17

What is your age range?

Answer Choices	Responses
20 and below	0.00% 0
21 - 30	9.84% 19
31 - 40	18.65% 36
41 - 50	30.57% 59
51 - 60	30.57% 59
61 - 70	8.81% 17
Above 70	1.55% 3

Q18

What is your primary continental location?

Answer Choices	Responses
North America	6.74% 13
Latin America	0.00% 0
Europe	68.39% 132
Africa	2.59% 5
Asia-Pacific	20.73% 40
Middle East	1.55% 3
Total	193