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ASSESSING THE AWARENESS AND IMPORTANCE OF HOUSING SUSTAINABILITY IN QUEENSLAND

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Abstract: Sustainability has been a major factor and determinant of commercial property design, construction, retro-fitting and landlord and tenant requirements over the last decade, supported by the introduction of rating tools such as NABERS and GreenStar and the recently mandated Building Energy Efficiency Certificate (BEEC).

However, the movement to sustainable and energy efficient housing has not been established for the same period, and although mandatory building regulations have been in place for new residential housing construction since 2004, the requirement to improve the sustainability and energy efficiency of housing constructed prior to 2004 has not been mandatory. Residential dwelling energy efficiency and rating schemes introduced in Australia over the past decade have included rating schemes such as BASIX, NatHERS, First rate, ACTHERS, and Building Code of Australia and these have applied to new dwelling construction. At both National and State level the use of energy efficiency schemes for existing residential dwellings has been voluntary and despite significant cash incentives have not always been successful or achieved widespread take-up.

In 2010, the Queensland Government regulated that all homes offered for sale, whether a new or existing dwellings require the seller to provide a “sustainability declaration” that provides details of the sustainability measures associated with the dwelling being sold. The purpose of this declaration being to inform buyers and increase community awareness of home sustainability features.

This paper uses an extensive review of real estate marketing material, together with a comprehensive survey of real estate agents to analyse the current market compliance, awareness and acceptance of existing green housing regulations and the importance that residential property owners and purchasers place on energy efficient and sustainable housing. The findings indicate that there is still little community awareness or concern of sustainable housing features when making home purchase decisions.

Key Words: Sustainability, housing, buyer decision making, buyer preferences, mandatory disclosure.

1 INTRODUCTION

Since 2004, there have been a range of both voluntary and mandatory measures introduced to improve the energy efficiency of both new and established residential properties. This paper will review the various measures that have been introduced in respect to energy efficiency in residential property in general and will pay particular attention to the most recent regulations that have now been mandated for established residential property in Queensland.

Reduction in energy use is a major concern for all governments, as increased energy use results in increased infrastructure costs to supply these demands for power and gas. The main approach to reduce energy use and improve energy efficiency in the housing sector has been the introduction and use of more efficient energy building materials, housing design and appliances, combined with the education of the general public on the need to conserve energy.

According to research by the Worldwatch institute, building impacts on the environment include 55% of timber consumption, 27% of plastics use, 12% of iron and steel use, 30% of raw material consumption, 40% of atmospheric pollution, 25% of solid waste, 24% of all water use, 20% of effluent, substantial indoor air quality issues, 37% of all energy, and 68% of all electricity use (Lenssen & Roodman, 1995; Newton et al., 2001). Given that building impacts could be split almost evenly between homes (55%) and commercial buildings (45%), the impact of residential housing on total energy use is substantial and increasing (Sullivan, 2007).

A New South Wales (NSW) Government (2004) final report on energy consumption in residential property confirmed that not only was energy use in residential property being driven by the increase in residential property numbers but also the increase in energy consumption by individuals.

This report identified the following as the key drivers to increased energy consumption in residential properties:

- Population growth;
- Poor design of residential areas and individual homes, which exacerbates heat problems and increases the reliance on air conditioning;
- Increased uptake of energy appliances in households to improve amenity; and
- Energy use patterns of appliances including issues such as standby power and appliance features.

As at 2008, there were 8.3 million residential properties in Australia (National Housing Supply Council, 2010) and less than 10% of these dwellings are new dwellings since 2004 (NSW Government, 2004). According to the Australian Bureau of Statistics ([ABS], 2008) the majority of households (77%) resided in separate houses. Of these separate houses, 37% comprised four or more bedrooms and this is a contributing factor to increased energy use. As expected, electricity was the main source of energy, used by nearly every household (99.9%), with electricity also the most commonly used energy source for hot water systems (46%) and space heating (35%).

This concern for the increasing demand and use of energy in residential property has resulted in a dual approach by both the Commonwealth and State Governments of Australia to reduce both the energy use of individual households and total energy use.

In late 2009, the Queensland Government introduced the requirement that all residential property vendors should provide on request a sustainability declaration covering the energy efficiency status of the dwelling they are selling. This paper uses an extensive survey of Queensland real estate agents and real estate advertising material to determine and assess:

- The level of real estate agents compliance to the newly introduced regulations;
- The level of awareness of residential property sellers of the new legislation requirements;
- The level of awareness of the potential residential property buyers of the sustainability declaration, including if and/or when this declaration was requested/provided in the inspection and sale process; and
- Buyer sustainability relevance and preferences.

This paper has been structured as follows: further to this Introduction, Section 2 discusses the evolution of the issue of sustainability in both new and established housing from a national perspective. Section 3 outlines the methodology employed in this study. Section 4 presents key findings and the conclusion is presented in Section 5.

2 RESIDENTIAL PROPERTY SUSTAINABILITY REGULATIONS AND GUIDELINES

Moves to improve the energy efficiency of dwellings have been focused on two separate areas. The first area has been regulation of the new construction sector of the residential property industry to ensure that all new construction meets specific guidelines. The second approach has been the move to improve the energy efficiency of residential property constructed prior to the new regulations.

2.1 New Residential Property Construction

Energy efficiency has been part of national and state based government policy since the 1970s (Prime Minister's Task Group on Energy Efficiency, 2010). Residential property accounts for 13% of final energy consumed in Australia, with residential energy use growing by 52% from 1884 to 2004. In comparison final energy use by Commercial and Services is 8.5%, mining 8.4% and Agriculture 2.3% (Department of Sustainability, Environment, Water, Population and Communities, 2007).

According to the ABS (2006), energy use in the residential sector is electric appliances (29%), water heating (28%), cooking (4%) and space heating and cooling (39%).

With current trend of increasing population and subsequent increase in the number of households, the decline density per household and a general increase in the size of the average home, combined with the popularity of large capacity air conditioners, is driving this demand for increase energy use in the residential property sector.

Energy efficiency measures were introduced into the Building Code of Australia in 2003, to eliminate the worst energy performance practices through a national standard approach.

By 2006, a number of national and State energy efficiency schemes for residential property had been introduced in addition to the BCA. In NSW BASIX was introduced with the goal to reduce water consumption by 40% and greenhouse emissions by 25%, rising to 40% in 2006. In 2005, the Victorian Government introduced the 5 Star Homes initiative, requiring all new residential homes to have a 5 star energy rating for the building fabric and the installation of either/and solar hot water system or rainwater tank (Building Commission of Victoria, 2006; Victorian Government, 2006). The Australian Capital Territory (ACT) has been the most active in relation to regulations for residential housing energy efficiency with rating schemes and regulations in place since 1995 (Australian Capital Territory Planning and Land Authority, 2004).

The most recent initiative in respect to energy efficiency has been the Council of Australian Governments ([COAG], 2009) National Strategy on Energy Efficiency released in July 2009. This strategy was formulated to accelerate energy efficiency measures and to provide a uniform and consistent approach across all States, especially in relation to raising minimum standards and promoting energy efficient technologies and approaches. These measures included:

- Assisting households and businesses to transition to a low-carbon future;
- Reducing impediments to the uptake of energy efficiency;
- Making buildings more energy efficient; and
- Governments working in partnership and leading the way.

2.2 Established Residential Property

Although the initial thrust of energy efficiency regulation was focussed on new residential property construction and this regulation has been mandatory, there have also been a number of schemes introduced to improve the energy efficiency of older established residential property not covered by the BCA legislation introduced after 2004. Schemes such as rebates for solar hot water systems, solar power, rainwater tanks and insulation have been voluntary not always taken up by all eligible home owners.

The ABS (2008) reports that there has been an increase in the use of insulation in homes, up from 52% of dwellings in 1994 to 61% in 2008. However, this research shows that the increase in awareness and installation of insulation has been driven by the need for comfort rather than an awareness or concern for energy use. Only a small proportion (4%) of households reported that they had installed insulation in order to save energy. The main reason for not installing insulation was that the household was not responsible for insulation (34%), i.e. that they were renting their dwelling (ABS, 2008).

In a number of Australian states, landlords can now claim reimbursement from tenants for excess water charges if they have installed water saving devices such as dual flush toilets and pressure restricting devices on taps and shower heads (Queensland Residential Tenancy Authority, 2010).

However, due to the voluntary nature of these schemes, their effectiveness has not been as great as anticipated. Similar schemes overseas in New Zealand, Canada, US and UK have shown take up rates less than 2% (Eves & Kippes, 2010). This low take up rate of voluntary energy efficiency schemes has now seen a number of Australian Governments legislate to improve the energy efficiency knowledge and use in residential property.

2.3 Residential Energy Efficiency Rating Tools

To assist participants in the residential property sector to understand, review and assess the energy efficiency of residential property, a number of rating tools have been developed across Australia. At the national level there is NatHERS (Nationwide House Energy Rating Scheme), which is also the basis of the ACT scheme. The New South Wales scheme is BASIX and in Victoria the 5 Star scheme is used for rating new construction. South Australia, Western Australia, Tasmania and Northern Territory have all based their energy efficiency minimums for new residential property construction on the Building Code of Australia energy efficiency provisions (Cooper, 2010).

2.4 Queensland Residential Property Sustainability Initiatives

Queensland had also based minimum energy efficiency requirements for new residential property on the Building Code of Australia provisions. However, the State Government has moved to also include existing residential property into the energy efficiency requirements by introducing a “Sustainability Declaration” into the residential property sale procedures.

The Queensland State Government mandated disclosure of the environmental features of dwellings for sale in Queensland from 1 January 2010. The purpose of this initiative was to *inform buyers about the sustainability features of a property and increase community awareness of the value of such features* (Queensland Government, 2010a, p.1). This “Sustainability Declaration” checklist is to be completed by the vendor and is a declaration of their dwelling’s environmental dwelling’s environmental and social sustainability features in four key areas: energy, water, safety and access. Compliance with this legislation requires specific action from each of the three parties involved in a transaction, being the seller, the sales agent, and the buyer.

The seller is required to complete a “Sustainability Declaration” checklist (the form) prior to the property being put on the market. This form is a declaration of the dwelling’s environmental and social sustainability features in four key areas: energy, water, safety and access. The seller is able to complete the form themselves, and the seller may leave items on the form blank if they do not know the answer. However, the seller can be liable for any losses incurred by the buyer as a result of false or misleading information contained on the form.

The sales agent is required to include information on where a copy of the sustainability declaration is available from and this is to be included on all forms of advertising, excluding newspaper and magazine advertisements. A copy of the completed form is to be on display whenever the home is open to the public for inspection and a copy must be provided to any prospective buyer on request.

The onus is on the buyer to ask for a copy of the form from the selling agent. (Queensland Building and Other Legislation Amendment Act 2009; Queensland Building and Other Legislation Amendment Act 2009 – Explanatory Notes; Queensland Government, 2010a, 2010b)

A major area covered by the sustainability declaration is the energy efficiency of the house being sold. In cases where the residential property is less than 6 years old, the house already meets the standards set out in the Building Code of Australia in respect to energy efficiency. However, the sustainability declaration is a valuable tool for the potential home purchaser to assess the energy efficiency of houses built prior to the current energy efficiency regulations.

As this declaration requirement has only been in place for twelve months, it is opportune to assess the initial acceptance, compliance and perceived benefit of this new regulation and the impact that the declaration is having on the residential real estate market in Queensland.

2.5 Buyer Awareness

Despite these continuing legislative frameworks and general awareness raising of energy and water costs in home ownership and occupation, this is not always considered to be a major factor in the residential house purchase decision making process. A study by Reed and Mills (2007) found that the financial aspects of the house purchase decision were the most significant factor for first home buyers and not the environmental factors. A further study by

Eves and Kippes (2010), and Kippes and Eves (2010) found that in the German and New Zealand residential property markets, buyers were more concerned about the price of the property, its location and number of bedrooms, than the energy efficiency or green rating of the property. These studies also showed that buyers were generally unaware of the energy efficiency schemes and measures and considered the most important environmental aspect of the residential dwelling to be the aspect of the building.

Kippes and Eves (2010) also found that, although mandatory disclosure of sustainability features were required for both residential home buyers and renters, in less than 50% of residential sales transactions it was not considered important by the purchaser and even less so by those considering leasing residential property.

3 RESEARCH METHODOLOGY

This research has been undertaken to assess the real estate industry compliance with the legislative requirements, as well as public awareness of the current legislation, specifically the need for residential property sellers to supply a sustainability declaration, and the buyer awareness in respect to the availability of the form and the importance of sustainability features in the buyer decision making process.

As this legislation has only recently been introduced, this initial survey and research will enable a benchmark position to be determined and follow up surveys will be conducted to assess changes in the level of compliance, awareness and acceptance over time.

The research methodology focuses on two stages. The first stage involved a review of advertising material for residential property listings in Brisbane, over a two week period, to determine the level of compliance of real estate agents and major residential property developers in respect to their obligations under the new legislation. This review covered internet real estate sites, newspapers and promotional brochures.

Stage two involved the construction of an online survey instrument to determine:

- the level of awareness of residential property sellers of the new legislation requirements;
- the level of awareness of the potential residential property buyers of the sustainability declaration, including if and/or when this declaration was requested/provided in the inspection and sale process; and
- buyer sustainability relevance and preferences.

With the co-operation of the Real Estate Institute of Queensland, member real estate agents and sales people were provided with an opportunity to participate in this on-line survey.

The survey also sought data that would allow the survey responses to be classified on the basis of:

- Geographic location (Brisbane and surrounds, Gold and Sunshine Coasts, etc.);
- Number of sales (gauge experience of responder);
- Average market sale range (Low value, medium value, high value markets); and
- Typical buyer profile (Single, investor, family/couples).

These respondent characteristics will allow the results to be further analysed in subsequent research on the basis of market location and buyer type. Based on these classifications the results will

determine if the level of awareness of the new sustainability declarations is consistent across the Queensland residential property market or varied depending on location or buyer type factors.

3.1 Respondent Summary

A total of 587 responses to this survey were received over a two week period. The survey was completed by a good cross section of respondents across Queensland. The high proportion from Brisbane and surrounds was to be expected (40%) where a large portion of the population is centred, however, it was also pleasing to see a spread of responses from other regions with 15% from the Gold Coast, 14% from the Sunshine Coast, 6% Western Queensland and the Darling Downs, 10% Central Queensland including Wide Bay/Burnet and 12% North/Far North Queensland.

The majority of respondents (71%) sold less than 50 residential properties since the introduction of the legislation, with 21% selling between 50 and 100 residential properties during this time period and only 8% selling in excess of 100 residential properties.

The survey data also showed that 65% of all properties sold during this time period by the respondents have been in the range of AU\$300,000 to AU\$550,000, with 12% of sales being less than AU\$300,000 and 23% being over AU\$550,000.

Since the introduction of the ‘Sustainability declaration’, those real estate agents surveyed reported that 43% of all sales transactions they have been involved in have been families, 24% singles or couples, 21% investors and older/retirees representing 19% of sales. The higher proportion of family and young buyers also corresponds to the predominant price range being AU\$300,000 to AU\$550,000.

4 RESULTS

Stage One research findings indicated a very high level of compliance from the professional real estate community. All forms of advertising reviewed, including online and print media, did comply with the requirements of the legislation. This compliance was generally achieved via a notation that Sustainability Declarations were available on request.

Stage Two quantitative research was completed over a two week period, with 587 responses received from REIQ members. The following results are a preliminary assessment of the data gathered.

The initial survey questions focussed on the level of awareness of buyers and sellers in respect to the forms. Fig. 01 below shows the current level of seller awareness of their responsibility to provide a sustainability declaration.

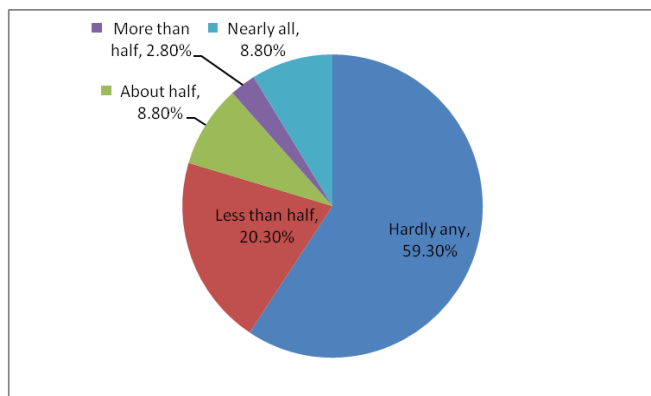


FIGURE 01: Seller Awareness of the Sustainability Declaration

From this figure it can be seen that 60% of real estate agents reported that sellers they had dealt with over the past 12 months had very limited awareness of the requirements to provide a sustainability declaration, with less than 10% of real estate agents reporting that nearly all their sellers over the past 12 months were aware of this requirement.

Additional questions were then asked to determine at what stage a sustainability declaration was requested by potential house buyers. This was based on the initial inspection, particularly for an open house inspection, as well as at any time during the sales process in general. From Fig. 02 & 03 below, it can be seen that 95% of real estate agents reported that during the open house inspections that they have carried out over the past 12 months hardly any (0 - 20%) of all potential buyers requested a copy of the form.

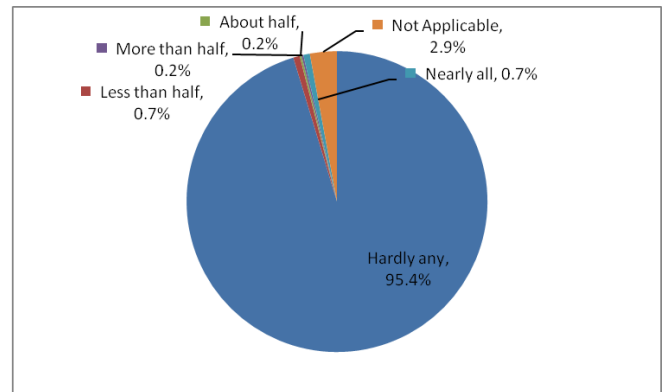


FIGURE 02: Buyer propensity to ask to view or receive a copy of the Sustainability Declaration at an open for inspection

Fig. 03 shows that this limited buyer interest and/or awareness during the initial property inspection continued throughout the full sales process, with 98% of agents surveyed indicating that hardly any (0 - 20%) clients requested the declaration at any time.

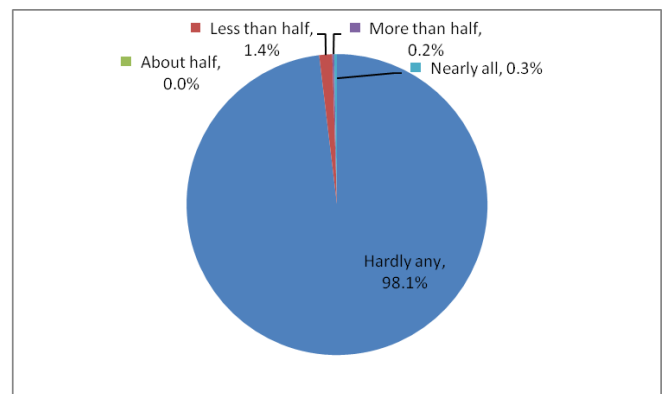


FIGURE 03: Buyer propensity to ask for a copy of the Sustainability Declaration at any time during the sales process

This evidence indicates that despite the fact that sustainability declarations have now been in operation in Queensland since January 2010, only a very limited number of house buyers are taking advantage of this energy and water efficiency measure in determining the suitability of the house for purchase.

Although real estate agents are only required by law to provide a copy of the sustainability declaration when asked for it by a potential buyer, anecdotal evidence collected prior to the formulation of the survey questions, indicated that a number of agents do provide the form to buyers in any case. Hence, the survey respondents were asked the question ‘If the buyer does not request the sustainability declaration at what point in the sales process is the declaration provided?’.

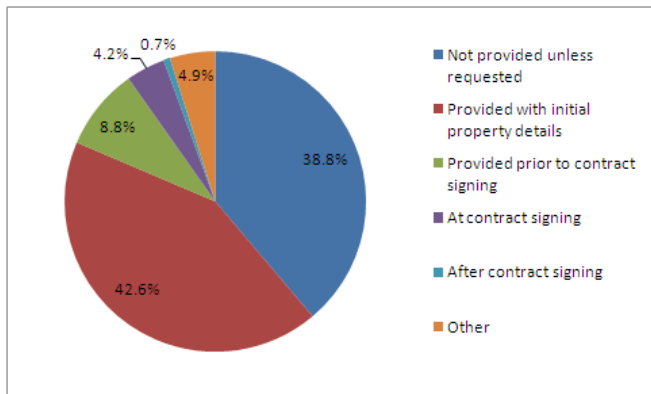


FIGURE 04: Agent provision of Sustainability Declaration (without being asked)

Responses to this question are shown in Fig. 04, and this shows that despite not being asked directly for the declaration, 43% of real estate agents actually provide this declaration to potential buyers with the initial property details, 39% advised that the declaration was not provided unless requested, with the remaining percentage advising that the declaration is provided just prior or at the signing of the contract. This indicates that almost 40% of the declarations provided by sellers are never presented to a potential buyer and remain only in the hands of the selling agent.

The remaining questions in this initial survey were designed to assess the perceptions of real estate agents in respect to the perceived importance of the sustainability declaration for home buyers and the main sustainability features buyers considered most important in the house purchase decision.

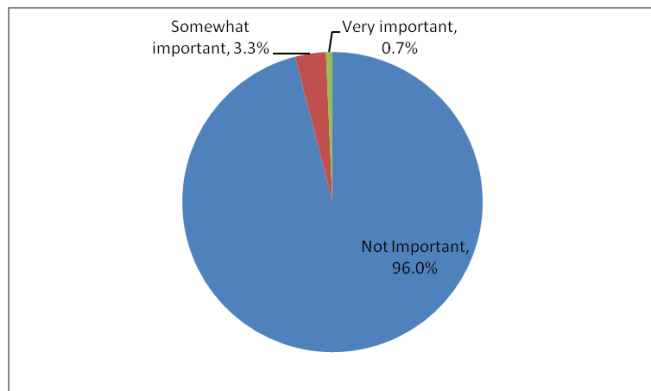


FIGURE 05: Importance of Sustainability to Home Buyers

As indicated in Fig. 05 above, at this stage of the sustainability awareness scheme, real estate agents report that in relation to the buyers that have purchased houses since the introduction the scheme, 96% have not considered the sustainability declaration to be an important factor in their house purchase decision. As demonstrated in Fig. 03 & 05, there is a very close correlation between the importance of sustainability to home buyers and their propensity to ask for a copy of the declaration. Only 3.5% of buyers considered this declaration to be somewhat important, with less than 1% of buyers considering this to be very important.

Fig. 06 adjacent shows the environmental aspects of home ownership that home buyers in Queensland over the past 12 months have considered being of some importance in relation to their home purchase.

Real estate agents reported that ceiling insulation was a factor that 34% of buyers enquired about during the sales process (both from a positive and negative perspective). 16% of buyers were interested in energy saving devices in the houses they purchased, with 10%

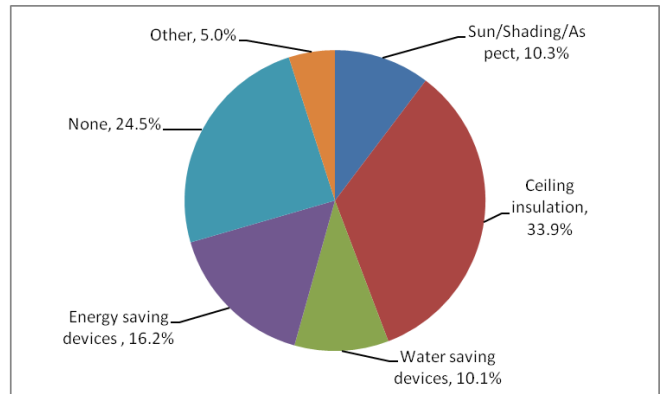


FIGURE 06: Desirable Sustainability features by home buyers

looking for water saving devices. 10% of home buyers were looking for houses with appropriate aspect (sun and shading). Of note, however, is that still up to 30% of agents reported that no sustainability features are of interest to home buyers.

Qualitative analysis of the numerous comments received through this survey, will be undertaken as part of further research on this topic, as will categorisation of responses by region, price point and buyer type. This further research will be used to determine if responses vary across these areas of differentiation in respect to location within Queensland and actual buyer type.

5 CONCLUSIONS

This paper presents initial findings on the impact of Queensland’s sustainability declarations in the first 12 months since their introduction by the State Government in January 2010.

The real estate industry has been very compliant with the new legislation and all residential property advertising in Queensland surveyed provided a note in relation to the sustainability declaration that the declaration will be made available on request and over 60% of real estate agents actually providing this declaration to the buyer during the sale process, whether requested or not.

Widespread disengagement with the sustainability declaration process was recorded from sellers and, even more so, from buyers. Results indicate that 98% of buyers do not ask for a copy of the sustainability declaration at any time during the sales process. Despite this, sellers are legislatively required to complete these forms to their best knowledge, prior to the property going to the market. Whilst agents are not required by law to provide sustainability declarations to potential buyers, many do (60%). Therefore, up to 40% of the forms completed by sellers, are never provided to any potential buyer. Of those that are used, virtually none (4%) impact the buyer’s decision making process.

Previous studies in the area of buyer awareness in 2007 and 2009, noted that environmental issues were not a major factor in the house purchase decision. This study again confirms that a further year on, this is still the case.

This lack of awareness from both buyers and sellers could be countered by a public awareness campaign formulated to raise awareness of the scale of housing’s contribution to sustainability issues such as water and energy consumption, and role of the sustainability declaration in helping home buyers make informed choices. Alternatively, a review of the current legislative mechanisms could work to more closely align the intent of the legislation with the actual outcomes.

The findings presented herein are based on raw data collected. Further research on this topic will include qualitative analysis of

the numerous supporting comments provided by respondents, as well as the potential for subsequent surveys, particularly after the introduction of the proposed national mandatory disclosure scheme for home energy efficiency (upon sale or rent) in May 2011.

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