



ADELAIDE CITY LIVING MARKET RESEARCH

VOLUME 3 — ADELAIDE CITY RESIDENTS

Collaborative Thinking. Positive Outcomes.

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Government of
South Australia



CITY OF
ADELAIDE

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EXECUTIVE SUMMARY

Increasing the city population is a shared objective of the Government of South Australia and the City of Adelaide. While the city population has been growing steadily, a much larger city population is sought. More city residents makes for a more vibrant, economically and socially robust city centre and capital city gateway to South Australia.

As a means of better understanding the key markets, demand drivers, product preferences and decision making associated with Adelaide city living, the Capital City Committee together with Renewal SA and the City of Adelaide commissioned market research into the subject.

The research was undertaken by Hudson Howells, strategic management consultants in South Australia, and comprised four surveys and seven focus groups. Surveys were conducted with the Adelaide metropolitan market, the interstate market (Brisbane, Sydney and Melbourne), current residents of Adelaide city centre (excluding North Adelaide) and international students living in Greater Adelaide respectively. Focus groups were undertaken with the Adelaide market.

A major component of the research was to identify specific market segments for Adelaide city living. Segmentation was attitudinal (also known as psychographic) as opposed to demographic or behavioural. This enables strategy to **be developed that specifically responds to identified needs, important in 'high involvement' decision making** such as housing choice.

Six segments were identified with one, deemed the Cosmopolitan segment, representing 76% of the Adelaide city residents survey and designated the primary market segment for Adelaide city living. This is a leadership group that is interested in city and apartment living, is adventurous, competitive and seeks out quality. This group is less likely to prefer a traditional style of home and has the highest incomes of all of the six groups, as well as the home equity to buy into the City.

A secondary market segment, the Urbanites, was also identified. This group is also interested in city and apartment living but comprises just 1% of the Adelaide city residents surveyed and does not have the disposable income of the Cosmopolitans.

This report presents the results of the Adelaide city residents survey.

Overall, a key finding of the survey was the very high levels of satisfaction of city residents with their decision to live in the City. A large number of the residents had lived in the city for more than three years and half had lived in the city at a different address previously. The large majority of this group are not planning to move from the city within the next five years, also confirming their high levels of satisfaction with city living.

Over half of the city residents did not consider any other areas before moving to the city and only a very small number considered North Adelaide, Norwood and Unley when deciding where to live.

When asked about their primary motivations for moving to the city, convenience of the location was the main reason given, followed by 'being close to work', low maintenance/downsizing and 'being close to everything'. The great majority of the sample reported that their expectations had been met in relation to city living.

In terms of identifying important features when deciding to live in the city, ease of walking around, lots of parks, trees, **café's and restaurants, being safe and secure**, and tree lined streets were nominated as the top five features. Since relocating to the city, existing residents indicated that they were highly satisfied with these aspects of city living.

When asked what they most like about where they currently live 'convenience' was the most frequently nominated reason. 'Close to everything', 'convenient for shopping/markets' and 'close to parks' were also frequently nominated reasons.

When asked what they least like about where they currently live, 'noisy area' was the most nominated reason by less than a quarter of the group followed by 'lack of parking spaces available'.

The large majority of the city residents surveyed currently live in either a house or townhouse with only a quarter living in a multi-storey apartment (consistent with the number of residents that have previously lived in an apartment). Of those city residents who currently live in a multi-storey apartment, the low maintenance required was the most attractive feature **closely followed by the ability to 'lock up and leave'**. **This group also nominated the lack of car parking for visitors as the least attractive feature of living in a city apartment.**

Although public transport was only of moderate importance to the city residents when choosing where to live, there is a high level of satisfaction with the current service. **On the attributes of 'proximity to home', 'value for money' and 'feeling safe using the service', there is also high satisfaction.**

In terms of car ownership there was a significant reduction in car ownership by city residents after moving to the city. The number of two car households decreased from 37% to 24% following a move to the city and the number of one car households increased from 49% to 56%. Living expenses are reported to have either stayed the same or decreased for almost two thirds of residents since moving to the city.

Interestingly, more than half of the city residents surveyed have also found they have increased their leisure time since moving to the city.

1 INTRODUCTION

The City of Adelaide's population was at its peak in 1915 with around 43,000 people living in the city. After the introduction of the motor car, enabling suburbia to develop and grow, the city population dropped to around 12,000 residents in the early 1980's. Since then, with the support of a range of State and Council residential growth initiatives, the population has continued to grow steadily and has now reached 23,615 (Australian Bureau of Statistics, Estimated Residential Population, 2016).

Increasing the city population is a shared objective of the Government of South Australia and the City of Adelaide. While the growth seen to date has been steady, a much larger city population is sought. More city residents makes for a more vibrant, economically and socially robust city centre and capital city gateway to South Australia. Absorbing growth in existing areas including the city centre also assists in reducing housing sprawl.

As a means of better understanding the key markets, demand drivers and barriers associated with city living, the Capital City Committee has partnered with the City of Adelaide and Renewal SA to undertake market research into the subject. The research will underpin future city residential growth strategy of Council and Government, and is offered to industry to inform city housing and service development strategy.

The market research was undertaken by Hudson Howells strategic management consultants in South Australia and comprised four surveys and seven focus groups. Surveys were conducted with the Adelaide metropolitan market, the interstate market (Brisbane, Sydney and Melbourne), current residents of Adelaide city centre (excluding North Adelaide) and international students living in Greater Adelaide respectively. Overall, 2,200 surveys were completed. The seven focus groups were undertaken with residents of Greater Adelaide in key life stage brackets.

The results of each survey and the focus groups as a whole are contained in the following reports:

- Volume 1: Adelaide Metropolitan Market
- Volume 2: Interstate Market
- Volume 3: Adelaide City Residents
- Volume 4: International Students
- Volume 5: Focus Groups

Digital copies of the reports are available on the City of Adelaide's Invest Adelaide and main websites (www.investadelaide.com.au/ and www.cityofadelaide.com.au/). The raw survey data (SPSS and Excel format) along with the reports can also be found at Data SA (www.data.sa.gov.au/).

This report provides an overview of the results of the Adelaide city residents survey (Volume 3).

2 METHODOLOGY

The market research comprised four key surveys and seven focus groups as outlined in the following table.

Research Categories	Research Technique	Sample Size
Adelaide Metropolitan Market	Telephone interview (48 questions)	1,000 interviews (987 useable)
Interstate Market	Online survey (33 questions)	1,000 questionnaires: Sydney (420) Melbourne (380) Brisbane (200)
Adelaide City Residents	Telephone interview (50 questions)	115 interviews
International Students	Online survey (57 questions)	120 questionnaires
Focus Groups	7 Separate Focus Groups - 1. Urbanites (8) 2. City Workers (6) 3. Retirees (8) 4. Pre-Retirees (7) 5. Young Singles (5) 6. City Residents – Recently Moved to City (7) 7. International Students (8) (Groups 2 to 7 were drawn from the Cosmopolitans market segment)	51 participants (total)

A questionnaire was developed for the Adelaide city residents survey (Appendix 1) based on the format of the survey for the Adelaide metropolitan market survey (Volume 1).

The sample size was 115 incorporating a 30 minute telephone interview with all respondents being adults.

A sample size of 115 provides a confidence interval (also called margin of error) of plus-or- minus 9% and a 95% confidence level. This means that if 50% of the sample selected a given answer you can be confident that if this question had been asked of the relevant population between 41% (50-9) and 59% (50+9) would have picked that answer.

The confidence level indicates how certain you can be. It is expressed as a percentage, in this case 95%, and represents how often the true percentage of the population who would pick an answer lies within the confidence interval. The 95% confidence level means you can be 95% certain; the 99% confidence level means you can be 99% certain. Most researchers use the 95% confidence level.

The Adelaide city residents survey incorporated a psychographic segmentation of the market based on the segmentation solution used for the Adelaide metropolitan market survey (Volume 1).

Through this process six segments were identified and given a descriptive label: Cosmopolitans, Homebodies, Traditionalists, Urbanites, Suburbanites and Diffidents.

3 SEGMENTATION

3.1 Overview

A key objective of the research was to identify one or more attitudinal ‘segments’ predisposed to city living and in particular Adelaide city living. Attitudinal (or psychographic) as opposed to demographic or behavioural segmentation enables strategy to be developed that specifically responds to identified needs, values and attitudes, important in ‘high involvement’ decision making such as housing choice.

From a segmentation perspective, the objective is to identify segments that are large enough to warrant the development of a marketing strategy which will potentially result in the establishment of a viable market share. At the same time it is important that the segments have minimal overlap; that is they are identifiable as discrete segments. Through this process, six segments were identified and given a descriptive label (see table below).

The Adelaide city residents market component of the study incorporated a psychographic segmentation of the market based on the segmentation solution used for the Adelaide metropolitan market component. This pre-determined segmentation allowed for a discriminant analysis to be run which predicted cluster membership in the subsequent three surveys (international students, Adelaide city residents and interstate market). This meant that each respondent from each of the surveys could be allocated to one of the six segments identified in the Adelaide metropolitan market study.

The following table highlights the change in size of each of the segments with the most significant change being a much higher percentage of Cosmopolitans and smaller percentages of Homebodies, Traditionalists, Suburbanites and Urbanites.

Segment	Adelaide Metropolitan Market Survey	Adelaide City Residents Survey	% Change
Segment 1 — Cosmopolitans	24%	76%	+52%
Segment 2 — Homebodies	23%	3%	-20%
Segment 3 — Traditionalists	14%	5%	-9%
Segment 4 — Urbanites	9%	1%	-8%
Segment 5 — Suburbanites	21%	9%	-12%
Segment 6 — Diffidends	9%	6%	-3%

The segmentation analysis for this research was undertaken by ‘Strategy By Design’, a Sydney based company specialising in advanced statistical analysis for market research, marketing, management consulting and human resource planning. See *Segmentation Overview* in the Adelaide Metropolitan Market Report (Volume 1) for a more detailed explanation of the segmentation process.

3.2 Segment Description and Market Depth

The following contains the six segment descriptions as they specifically relate to the Adelaide city residents market. As this survey has a sample size of only 115 respondents as (opposed to 1,000 in the Adelaide metropolitan market survey), caution should be exercised when interpreting the results at the individual segment level.

Cosmopolitans – 76%

The Cosmopolitans is the largest of the six segments at 76% and is reflective of the sample which was drawn from the City of Adelaide.

Along with the Urbanites, the Cosmopolitans find the idea of living in or close to the city appealing (100% compared to 99% of the total sample). They also share the Urbanites appetite for medium and higher density residential living claiming that living in a terrace, townhouse or apartment is appealing (57% compared to 50% of the total sample).

The Cosmopolitans are so named because of their cosmopolitan outlook on life. This is evidenced by their adventurous and outgoing nature (76% compared to 72% of the total sample), their appetite for travel around Australia and overseas (93% compared to 90% of the total sample) and their interest in living in an area where there is a mix of people from different backgrounds (84% compared to 81% of the total sample).

Importantly they are confident (99% compared to 94% of the total sample) and have a clear idea of their goals in life (89% compared to 88% of the total sample).

The Cosmopolitans also show an interest in sustainability preferring to live in a development with the latest in environmental initiatives (74% compared to 64% of the total sample), are prepared to pay a premium for an energy efficient house (71% compared to 65% of the total sample) and are prepared to pay more for electricity generated from renewable resources (64% compared to 58% of the total sample).

The Cosmopolitans are pretty active when it comes to keeping fit or playing sport (80% compared to 79% of the total sample) and are more likely to walk or ride their bike in preference to using their car (90% compared to 86% of the total sample).

The Cosmopolitans are more likely to take risks (47% compared to 45% of the total sample), be competitive (52% compared to 48% of the total sample) and consider themselves to be cultured (86% compared to 84% of the total sample). **They think that it's important to set and enforce housing standards to protect their investment** (82% compared to 80% of the total sample) and a sense of community is important to them when they are choosing somewhere to live (85% compared to 83% of the total sample).

The Cosmopolitans are less likely to:

- Describe themselves as a homebody (47% compared to 50% of the total sample)
- Prefer to live on a traditional block of land (11% compared to 13% of the total sample)
- Feel uncomfortable when they are out of their normal environment (11% compared to 13% of the total sample)
- Prefer to live in an area where most of the people come from backgrounds similar to their own (23% compared to 28% of the total sample)

- Prefer to live in an area where all of the homes are of a similar style and quality (21% compared to 28% of the total sample)

The value of their current homes tends to fall either in the \$400,000 to less than \$700,000 range or in the **\$700,000 plus range and the vast majority are likely to consider Adelaide to be both a 'Beautiful City' and a 'Liveable City'.**

A small percentage of Cosmopolitans (13%) plan to move within the next five years with 5% stating a preference to stay in the city centre and the remaining 8% planning to move outside of the city centre.

This segment has an average percentage of females at 48% and an average age profile with 17% aged 18 to 39 years of age and 78% aged 50 years of age or more. This age profile is also reflected in the household pattern with 3% being couples or single parents with mainly adult children still living at home, 53% older couples with no children at home and 29% lone person households.

In terms of employment, 29% of this segment claims to be in either the professional or white collar employment categories with a high percentage of retirees (58%). The Cosmopolitans have average household incomes with 39% having annual incomes of \$80,000 or more.

In summary, at 76% of the overall sample, the Cosmopolitans rate very highly as a market segment. The Cosmopolitans segment considers Adelaide to be both a beautiful and liveable city. They are great ambassadors for the City. They are engaged, active, confident, leaders who should respond very favourably to a carefully developed and implemented Adelaide city centre residential brand proposition, further reinforcing their very positive view of city living.

Homebodies – 3%

The Cosmopolitans dominate in this segmentation analysis with the Homebodies representing just 3% of the survey sample.

The Homebodies are so named because they describe themselves as just that. The Homebodies tend to feel uncomfortable outside of their normal environment and prefer to live in a traditional home.

The vast majority of Homebodies:

- Believe that safety and security is an important consideration when choosing somewhere to live
- Value peace and quiet as an important consideration when choosing somewhere to live
- Consider that privacy is an important consideration when choosing somewhere to live

The Homebodies are less inclined to:

- Describe themselves as adventurous and outgoing
- Take the lead in a group situation
- Have travelled a lot around Australia or overseas
- Consider themselves to be competitive
- Consider themselves to be confident
- Take risks
- Be active when it comes to keeping fit or playing sport
- Have a clear idea of their goals in life
- Consider themselves to be cultured
- Consider themselves to be a trendsetter

- Consider themselves to be well-educated
- Walk or ride a bike in preference to using their car
- Be more concerned with what they think than what other people think of them
- Prefer to live in a contemporary style, architecturally designed home

In terms of housing, the Homebodies are less inclined to find the idea of living in or very close to the city appealing or find living in a terrace or townhouse appealing with only a small percentage claiming they would find apartment living appealing.

In summary a very small percentage of Homebodies have chosen Adelaide as a place to live. They are ranked as a tertiary market segment as potential Adelaide residents.

Traditionalists – 5%

The Cosmopolitans dominate in this segmentation analysis with the Traditionalists representing just 5% of the survey sample. The Traditionalists are so named because of the six segments, this group has a high percentage of people who would prefer to live on a large traditional block of land and a similarly high percentage of people who would prefer to live in a traditional style of home.

In other areas of housing, the Traditionalists are less likely to prefer a terrace or townhouse and don't find the idea of apartment living very attractive. Unsurprisingly the Traditionalists tend to find the idea of living in or very close to the city much less appealing.

Along with the Cosmopolitans, the Traditionalists share an interest in sustainability with a preference to live in a development with the latest in environmental initiatives, are prepared to pay a premium for an energy efficient house and are prepared to pay more for electricity generated from renewable resources. In addition the Traditionalists tend to think Australians are not doing enough to combat climate change.

The Traditionalists are more concerned with what they think than what other people think of them, would prefer to live in an area where all the homes are of a similar style and quality, would describe themselves as a bit of a homebody and would prefer to live in an area where there is a mix of people from different backgrounds.

The Traditionalists claim to be cultured, have a clear idea of their goals in life and are prepared to pay a premium for an upmarket brand they can trust.

The vast majority of Traditionalists:

- Consider that a sense of space and openness is important
- Consider that peace and quiet is an important consideration when choosing somewhere to live
- Consider themselves to be confident
- Consider that a sense of community is an important consideration when choosing somewhere to live

In summary the Traditionalists, as their segment name suggests, are traditional in their attitudes to housing - a preference for a traditional home on a large traditional block of land. The Traditionalists are confident, cultured and know where they are headed in life but this is not a leadership segment.

As anticipated the percentage of Traditionalists who are living in the City of Adelaide is very small as they are not attracted to city living. Overall the Traditionalists are ranked as a tertiary market segment for Adelaide.

Urbanites – 1%

The Cosmopolitans dominate in this segmentation analysis with the Urbanites representing just 1% of the survey sample. The Urbanites are so named because the vast majority of the members of this segment are attracted to the idea of city or near-city living or in higher density developments such as apartments and terrace / townhouses.

Interestingly, the Urbanites would like to live in a development that is protected by locked gates or a guard, would prefer to live in a contemporary style, architecturally designed home and to live in a development that has a diverse range of architectural styles.

The Urbanites segment has a decidedly green tinge with a preference for homes that are energy efficient and developments that include the latest in environmental initiatives. The Urbanites are also prepared to pay a premium for an upmarket brand they can trust and see themselves as trendsetters. This is by far the trendiest of the six segments.

The vast majority of Urbanites:

- **Think it's important that standards are set and enforced** for new housing developments
- Have a clear idea of their goals in life
- Consider themselves to be confident
- Claim that keeping in close contact with their families is important to them
- Consider that peace and quiet is an important consideration when choosing somewhere to live
- Consider themselves to be well-educated
- Consider that safety and security is an important consideration when choosing somewhere to live

The Urbanites segment is one of three leadership segments (the others being the Cosmopolitans and the Suburbanites) claiming they often take the lead in a group situation.

In summary, at 1% of the overall sample the Urbanites rate as a secondary market segment for Adelaide residential living and are attractive because of their strong interest in urban and higher density living.

Suburbanites – 9%

The Cosmopolitans dominate in this segmentation analysis with the Suburbanites representing just 9% of the survey sample. The Suburbanites are so named because of the six segments, this group has a high percentage of people who might be described as having 'suburban' attitudes. They have an appetite for a traditional home on a large traditional block of land and they are adventurous, outgoing, confident and competitive.

This is evident in their level of agreement with the following statements:

- I would prefer to live in a traditional style of home
- I would prefer to live on a large traditional block of land
- **I describe myself as kind of adventurous and outgoing**
- I have a clear idea of my goals in life
- I think most people who know me well would consider me a competitive person
- A sense of space and openness is important to me

The Suburbanites are one of three leader segments (the others being the Cosmopolitans and the Urbanites) claiming they often take the lead in a group.

The Suburbanites have limited interest in sustainability and are less inclined to:

- Prefer to live in a development that includes the latest in environmental initiatives
- Pay more for renewable energy
- **Agree that Australians aren't doing enough to combat climate change**
- **Pay a premium for a house that's energy efficient**

The Suburbanites are also less inclined to:

- Prefer to live in a development with a diverse range of architectural styles
- Prefer to live in an area where there is a mix of people from different
- Feel uncomfortable out of their normal environment
- Pay a premium for an upmarket brand they can trust
- Prefer to walk or ride their bike in preference to using their car
- Describe themselves as a homebody

Not surprisingly the Suburbanites are less inclined to prefer to:

- Live in or close to the city
- Live in a terrace or townhouse
- Live in an apartment
- Live in a contemporary style, architecturally designed home

The vast majority of Suburbanites:

- Consider that peace and quiet is an important consideration when choosing somewhere to live
- Consider that privacy is an important consideration when choosing somewhere to live
- Consider that keeping in close contact with their family is important
- Consider themselves to be well-educated
- Consider that safety and security is an important consideration when choosing somewhere to live

In summary the Suburbanites, as their segment name suggests, are typified by their suburban attitudes. They are adventurous, outgoing, confident and competitive with minimal interest in sustainability. The Suburbanites rank as a leadership segment but this is not a priority segment as they have little interest in city living and are therefore ranked as a tertiary market segment.

Diffidents – 6%

The Cosmopolitans dominate in this segmentation analysis with the Diffidents representing just 6% of the survey sample. The Diffidents are so named because of the six segments, this group has by far the highest percentage of people who have minimal interest in community, a low level of interest in keeping in close contact with their family, a low level of confidence and are generally neither adventurous nor outgoing.

On a positive note, the Diffidents are attracted to terrace and townhouse living and somewhat attracted to apartment living and living in or near the city.

In summary the Diffidents are a tertiary segment with limited potential for engagement.

3.3 Segment Priorities

The Adelaide Metropolitan Market Report contains a recommendation for the segment priorities. The report also highlighted that in terms of strategy development it is important to prioritise the market segments.

Each segment was prioritised and it was recommended that the Cosmopolitans be classified as the primary market segment with the Urbanites being the secondary market segment. The remaining four segments were classified as tertiary market segments.

The segment priorities as they relate to the Adelaide city residents' market has been identified as follows:

- | | |
|----------------------------------|-------------------------|
| ➤ Segment 1 — Cosmopolitans 76% | Primary Target Market |
| ➤ Segment 2 — Homebodies 3% | Tertiary Market |
| ➤ Segment 3 — Traditionalists 5% | Tertiary Market |
| ➤ Segment 4 — Urbanites 1% | Secondary Target Market |
| ➤ Segment 5 — Suburbanites 9% | Tertiary Market |
| ➤ Segment 6 — Diffidents 6% | Tertiary Market |

It is very encouraging and in line with expectations that the segmentation of the Adelaide city residents market shows that the size of the primary target market, the Cosmopolitans, is the largest of the six markets by a significant margin.

The following segment snapshot table highlights key variables for each of the six segments, with the Cosmopolitan segment highlighted. As noted above, the sample size is very small so caution should be exercised when interpreting findings.

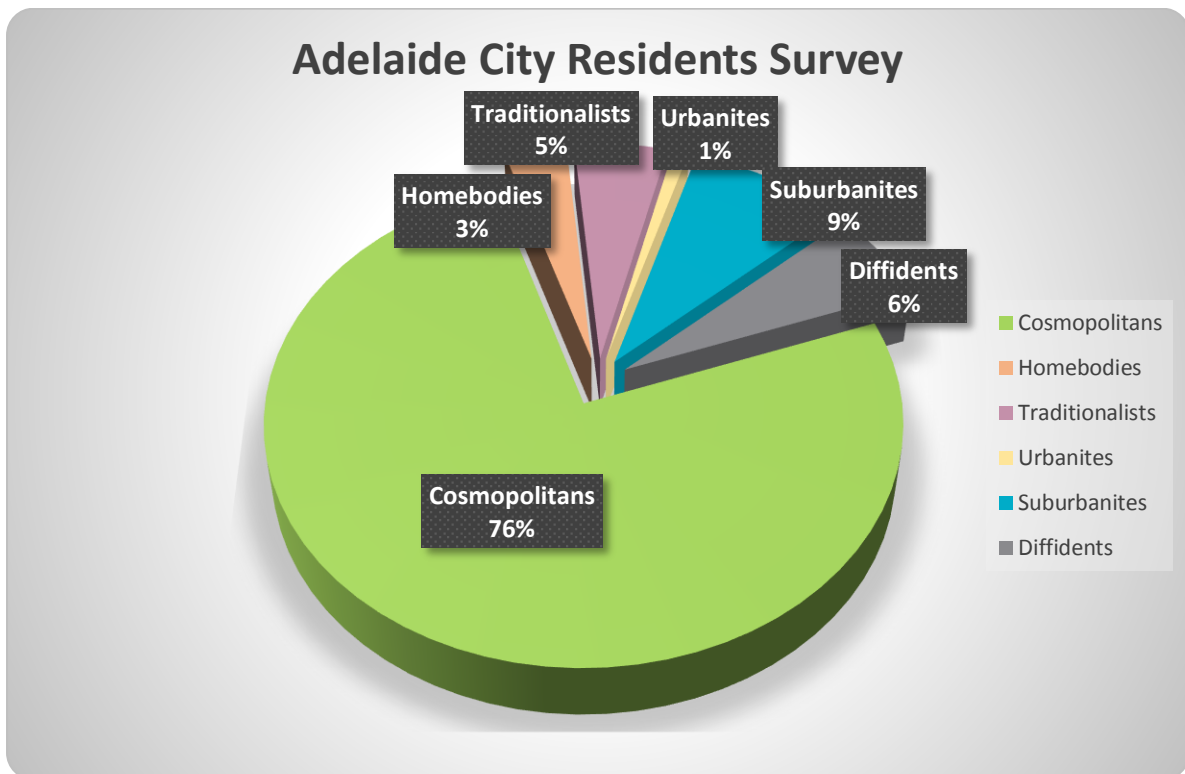
Segment Snapshot – City Residents		Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
	TOTAL						
<i>(caution – small sample size n = 115)</i>	100%	76%	3%	5%	1%	9%	6%
Own home outright	58%	56%	75%	83%	0%	50%	71%
Own with mortgage	10%	9%	0%	17%	0%	50%	71%
Rent	32%	34%	25%	0%	100%	30%	29%
Value of current home - <\$400,000	3%	2%	33%	0%	0%	0%	0%
Value of current home - \$400,000 to <\$700,000	51%	57%	33%	34%	0%	28%	60%
Value of current home - \$700,000+	45%	43%	33%	67%	0%	71%	20%
Adelaide – a Beautiful City*	95%	95%	100%	100%	100%	90%	86%
Adelaide – a Liveable City*	99%	100%	100%	100%	100%	100%	86%
Plan to move to another home in city centre in next 5 years	7%	5%	25%	17%	0%	10%	0%
Plan to move to another home outside of city centre in next 5 years	9%	8%	25%	0%	100%	10%	0%
Gender – female (quota applied)	49%	48%	50%	33%	100%	60%	43%
Age 18 to 39	18%	17%	25%	17%	100%	20%	29%
Age 50 +	76%	78%	75%	84%	0%	80%	57%
Couple or single parent with mainly adult children still living at home	3%	3%	0%	0%	0%	10%	0%
Older couple, no children at home	49%	53%	25%	67%	0%	20%	43%
Lone person household	30%	29%	50%	17%	0%	60%	14%
Occupation - Professional + White Collar	28%	29%	25%	50%	0%	10%	14%
Occupation – Retired (self-funded + pensioner)	54%	58%	50%	50%	0%	60%	29%
Household income <\$40,000	22%	24%	25%	0%	0%	30%	14%
Household income \$40,000 to <\$80,000	21%	22%	25%	17%	0%	10%	14%
Household income \$80,000+	40%	39%	50%	83%	0%	30%	29%

In summary, at 76% of the overall sample, the Cosmopolitans rate very highly as a primary market segment. The Cosmopolitans segment considers Adelaide to be both a beautiful and liveable city and they have every indication of being great ambassadors for the City. They are engaged, active, confident, leaders who should respond very favourably to a carefully developed and implemented Adelaide city centre residential brand proposition further reinforcing their very positive view of city living. The Urbanites at 1% of the overall sample the Urbanites rate as a secondary market segment for Adelaide residential living and are attractive because of their strong interest in urban and higher density living.

4 RESEARCH FINDINGS

This section of the report details the overall study findings from the telephone survey and provides further insights to the market. The format of this section follows the sequence of the survey questionnaires.

As detailed in Section 2, a total of 115 respondents participated in the survey. The survey data are reported on by market segment and compared to the total sample. The following pie charts show the relative sizes for the six respondent segments.



It is important to note that not all respondents answered every question as some questions were only asked of those respondents who provided a particular response to a previous question.

Also, there are some instances where the aggregate of two percentages sums to either + or - 1% of the aggregated figure. This is a result of the rounding of decimal places.

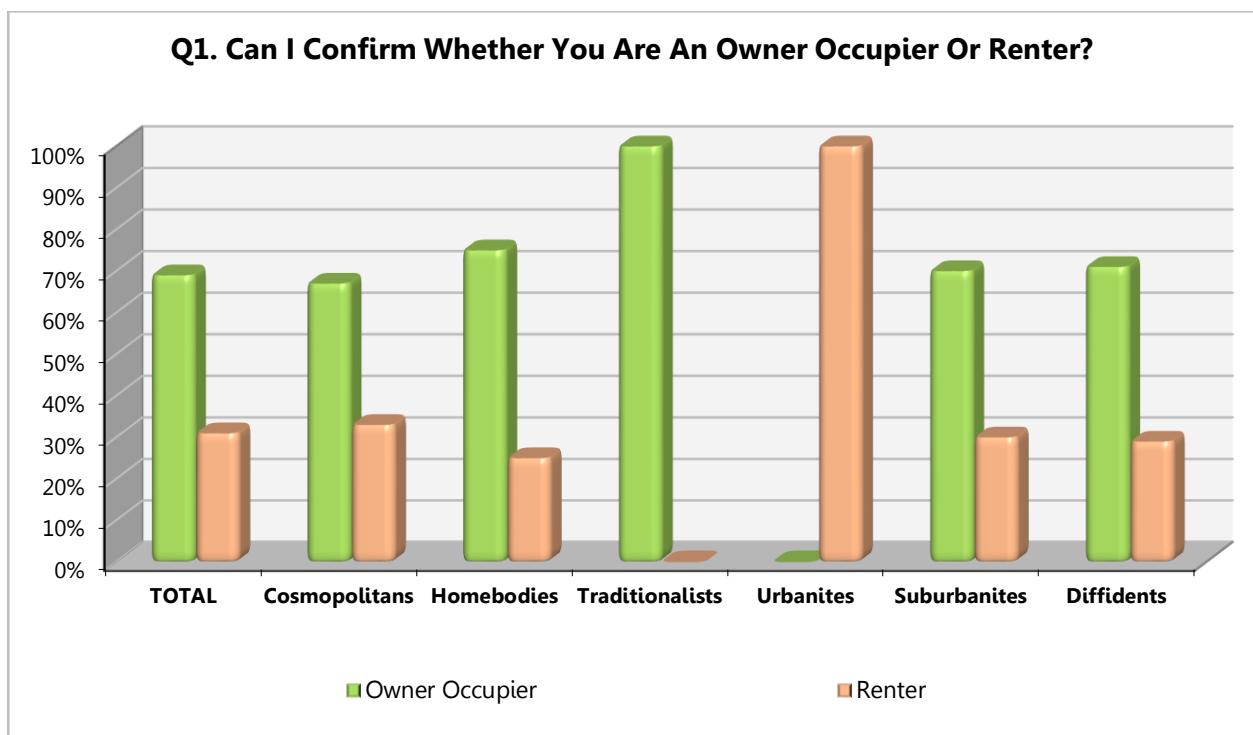
As the sample size for this survey is relatively small comparisons between segments have not been made.

4.1 Place of Residence (Current and Previous)

Question 1 - Can I please confirm the suburb and postcode you currently live in, whether you are an owner occupier or renter and postcode you currently work or study in?

Owner/Occupier or Renter

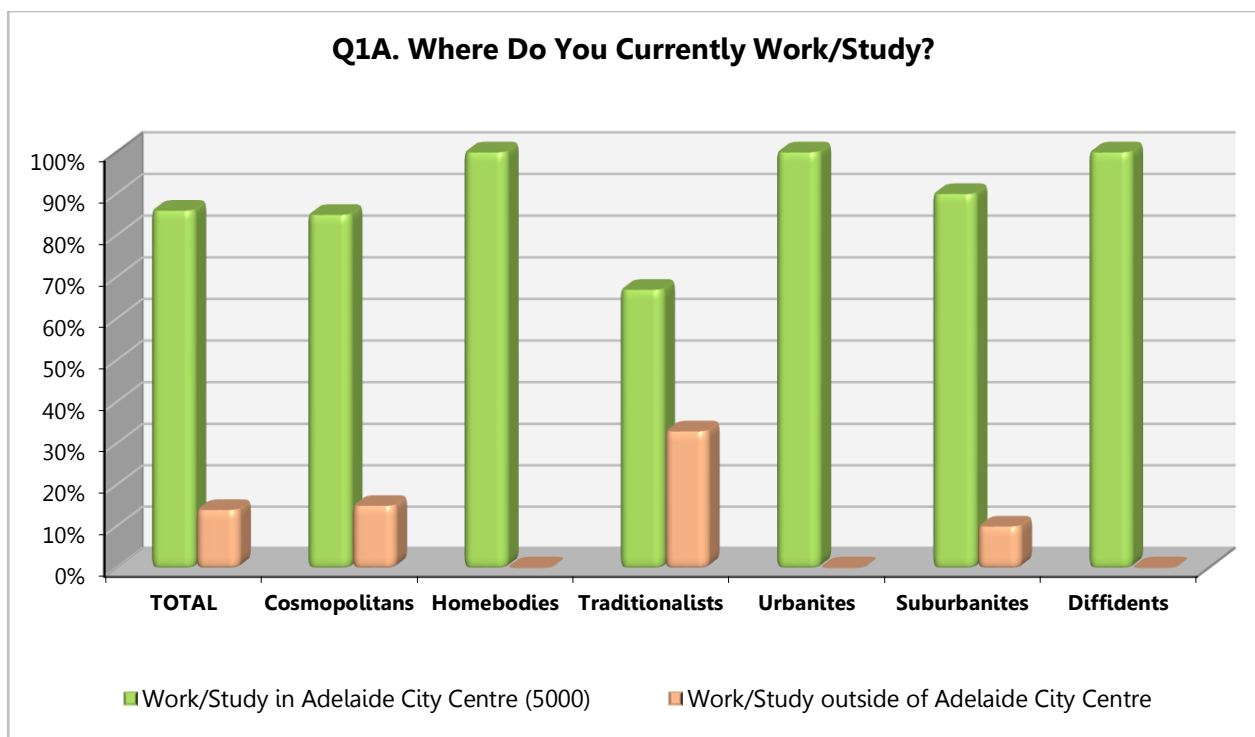
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Owner Occupier	69%	67%	75%	100%	0%	70%	71%
Renter	31%	33%	25%	0%	100%	30%	29%



Over two-thirds of total respondents are owner/occupiers (69%). This compares with the actual number of rented dwellings which is estimated at 65% based on ABS data.

Question 1a - Work/Study Location?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	115	87	4	6	1	10	7
Work/Study in Adelaide City Centre (5000)	86%	85%	100%	67%	100%	90%	100%
Work/Study outside of Adelaide City Centre	14%	15%	0%	33%	0%	10%	0%

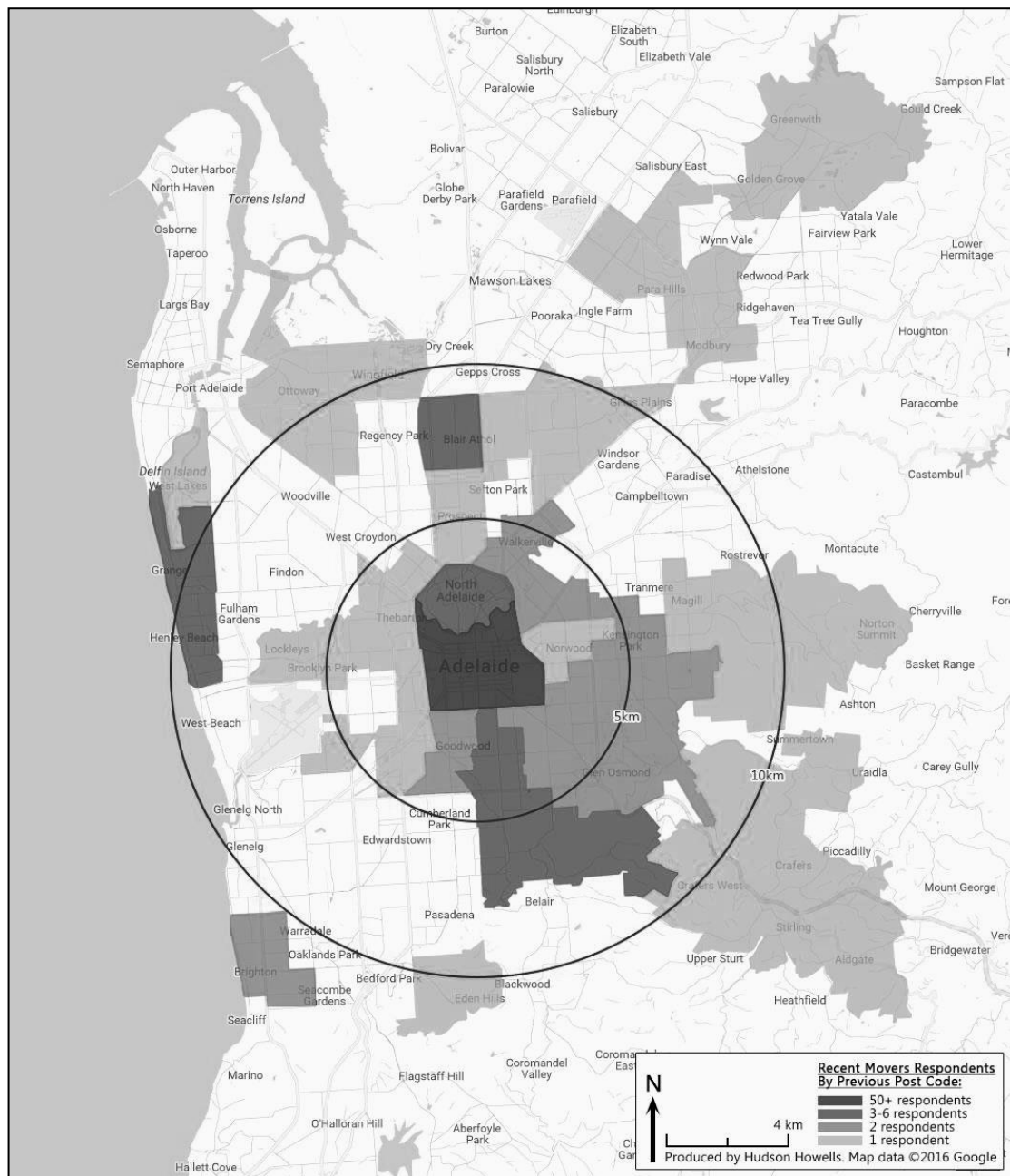


The vast majority of total respondents work or study within the Adelaide City Centre (86%).

Question 2 - And what was the postcode of your previous address?

Half of the total respondents had previously lived within the Adelaide CBD (45%) and North Adelaide (5%). A further 17% of survey respondents had moved from locations within 5kms of the Adelaide CBD.

Please refer to the following map which highlights the respondents by previous postcode.

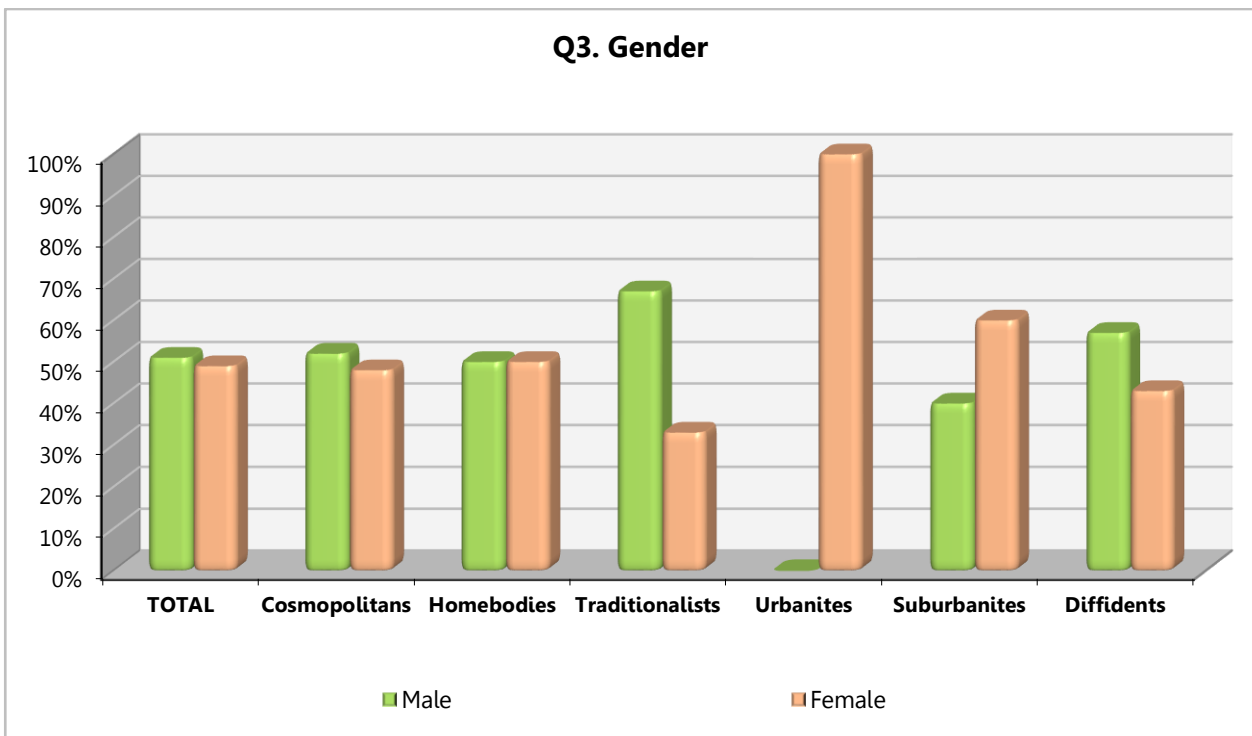


No. of Respondents	Post Code	Suburbs
50+ respondents	5000 (x52)	Adelaide
3-6 respondents	5006 (x6)	North Adelaide
	5061 (x5)	Hyde Park, Malvern, Unley, Unley Park
	5062 (x4)	Clapham, Hawthorn, Kingswood, Lower Mitcham, Lynton, Mitcham, Netherby, Springfield, Torrens Park
	5022 (x3)	Grange, Henley Beach, Henley Beach South, Tennyson
	5084 (x3)	Blair Athol, Kilburn, Kilburn North
2 respondents	5034 (x2)	Clarence Park, Goodwood, Kings Park, Millswood, Wayville
	5048 (x2)	Brighton, Dover Gardens, Hove, North Brighton, South Brighton
	5063 (x2)	Eastwood, Frewville, Fullarton, Highgate, Parkside
	5064 (x2)	Glen Osmond, Glenunga, Mount Osmond, Myrtle Bank, St Georges, Urrbrae
	5065 (x2)	Dulwich, Glenside, Linden Park, Toorak Gardens, Tusmore
	5066 (x2)	Beaumont, Burnside, Erindale, Hazelwood Park, Stonyfell, Waterfall Gully, Wattle Park
	5068 (x2)	Heathpool, Kensington, Kensington Gardens, Kensington Park, Leabrook, Marryatville, St Morris, Trinity Gardens
	5069 (x2)	College Park, Evandale, Hackney, Maylands, St Peters, Stepney
	5081 (x2)	Collinswood, Gilberton, Medindie, Medindie Gardens, Vale Park, Walkerville
1 respondent	5007, 5012, 5013, 5021, 5031, 5032, 5035, 5037, 5050, 5067, 5072, 5082, 5085, 5086, 5092, 5096, 5125, 5136, 5141, 5152, 5154, 5214, 5222, 5606	

4.2 Demographics

Question 3 - Gender

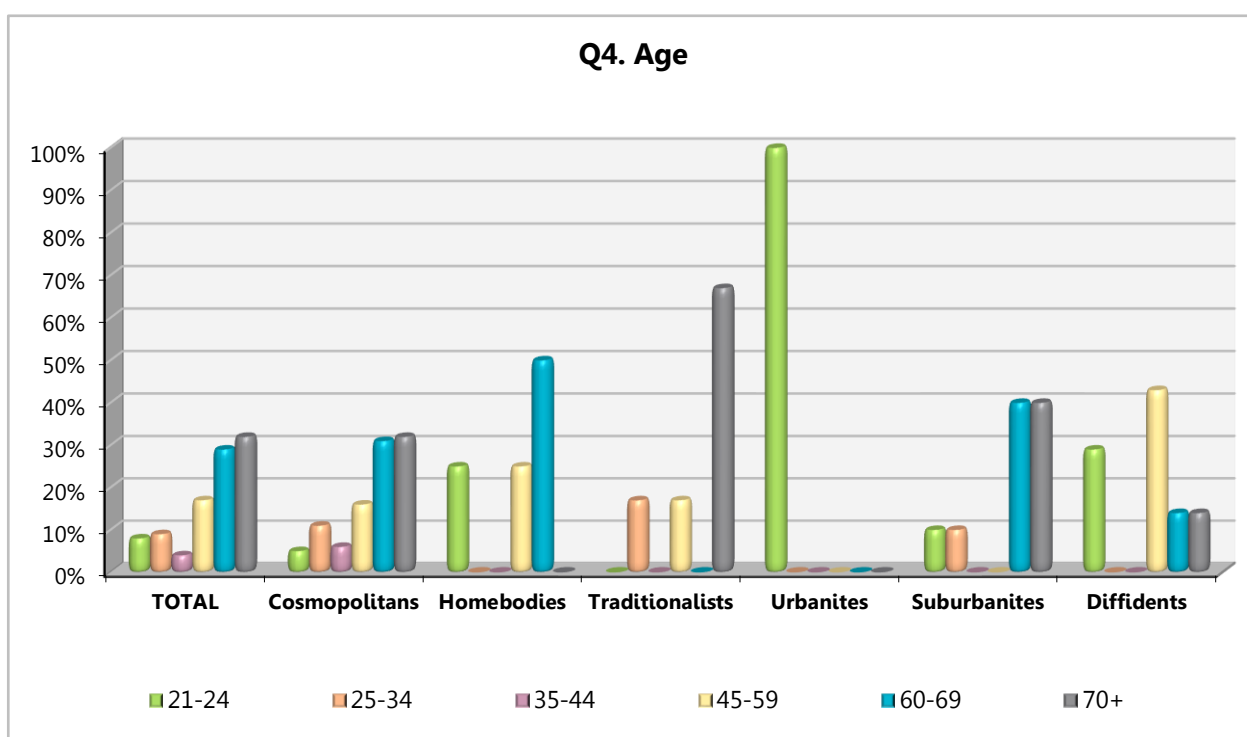
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Male	51%	52%	50%	67%	0%	40%	57%
Female	49%	48%	50%	33%	100%	60%	43%



There was an even split of males (51%) and females (49%) represented in the survey (quota not applied).

Question 4 - Which of the following age categories are you in?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	115	87	4	6	1	10	7
21 to 24	8%	5%	25%	0%	100%	10%	29%
25 to 29	6%	6%	0%	17%	0%	10%	0%
30 to 34	3%	5%	0%	0%	0%	0%	0%
35 to 39	1%	1%	0%	0%	0%	0%	0%
40 to 44	3%	5%	0%	0%	0%	0%	0%
45 to 49	2%	1%	0%	0%	0%	0%	14%
50 to 59	15%	15%	25%	17%	0%	0%	29%
60 to 64	10%	8%	25%	0%	0%	30%	14%
65 to 69	19%	23%	25%	0%	0%	10%	0%
70 to 74	21%	21%	0%	50%	0%	30%	0%
75 or over	11%	11%	0%	17%	0%	10%	14%
21 to 39	18%	17%	25%	17%	100%	20%	29%
40 to 59	20%	21%	25%	17%	0%	0%	43%
60 or over	61%	63%	50%	67%	0%	80%	28%



Just under a third of total respondents (38%) are aged 59 years of age or less with 61% aged 60 years or more.

4.3 Suburb Amenity Perceptions

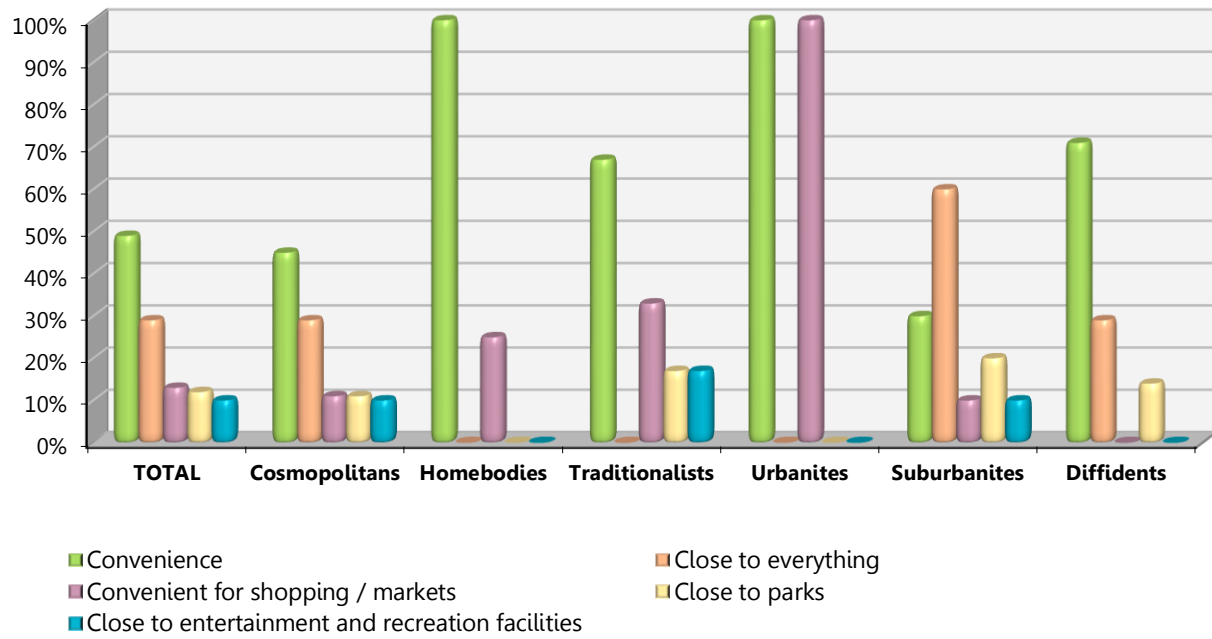
Question 5 - What do you most like about where you currently live?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Convenience	49%	45%	100%	67%	100%	30%	71%
Close to everything	29%	29%	0%	0%	0%	60%	29%
Convenient for shopping / markets	13%	11%	25%	33%	100%	10%	0%
Close to parks	12%	11%	0%	17%	0%	20%	14%
Close to entertainment and recreation facilities	10%	10%	0%	17%	0%	10%	0%
Good public transport	10%	11%	0%	0%	100%	10%	0%
Close to restaurants or cafes	10%	10%	25%	17%	0%	10%	0%
Peace and quiet (tranquillity)	10%	10%	0%	17%	0%	10%	0%
Location / area	7%	7%	0%	17%	0%	10%	0%
Close to work	6%	7%	0%	0%	0%	10%	0%
Convenient to the city	6%	6%	0%	0%	0%	20%	0%
My home/apartment	3%	3%	0%	0%	0%	0%	0%
Good neighbours / neighbourhood	3%	2%	0%	0%	0%	10%	14%
It is a safe and secure place to live / a place where I feel safe	3%	3%	0%	0%	0%	0%	14%
Close to medical facilities	3%	3%	0%	0%	0%	0%	0%
Close to where I study	3%	2%	0%	0%	0%	0%	14%
We have a small low maintenance block that suits our lifestyle	1%	1%	0%	0%	0%	0%	0%
Close to friends	1%	1%	0%	0%	0%	0%	0%
Convenient for schools / kindergarten / childcare for my children	1%	1%	0%	0%	0%	0%	0%
Surrounded by attractive homes	1%	0%	0%	17%	0%	0%	0%

When asked what they most like about where they currently live 'Convenience' was the most frequently nominated reason for total respondents (49%). 'Close to everything' (29%), 'Convenient for shopping/markets' (13%) and 'Close to parks' (12%) were also frequently nominated by total respondents.

Please refer to the chart on the following page.

Q5. What Do You Most Like About Where You Currently Live? - Top 5



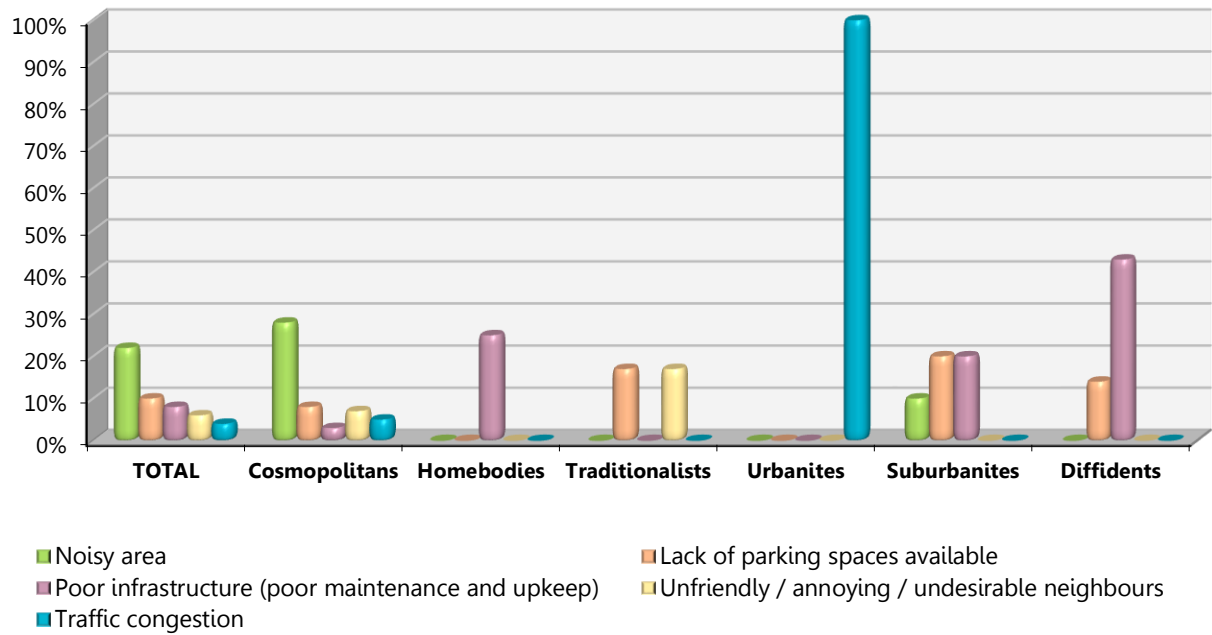
Question 6 - What do you least like about where you currently live?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	115	87	4	6	1	10	7
Noisy area	22%	28%	0%	0%	0%	10%	0%
Lack of parking spaces available	10%	8%	0%	17%	0%	20%	14%
Poor infrastructure (poor maintenance and upkeep)	8%	3%	25%	0%	0%	20%	43%
Unfriendly / annoying / undesirable neighbours	6%	7%	0%	17%	0%	0%	0%
Traffic congestion	4%	5%	0%	0%	100%	0%	0%
Not enough private open space (private outdoor area)	3%	2%	0%	17%	0%	10%	0%
Price / Cost of living	3%	2%	0%	0%	0%	10%	0%
High rise / density, overdevelopment, development issues	3%	2%	0%	17%	0%	0%	0%
Poor public transport	2%	1%	0%	0%	0%	10%	0%
Unsafe area/crime	2%	2%	0%	0%	0%	0%	0%
Not convenient for shopping	1%	0%	0%	0%	0%	10%	0%
Not to anything	1%	1%	0%	0%	0%	0%	0%
Poor / bad weather conditions	1%	1%	0%	0%	0%	0%	0%
Ethnic population / cultural issues / racism	1%	0%	0%	17%	0%	0%	0%
Other	1%	1%	0%	0%	0%	0%	0%
Nothing	41%	40%	75%	50%	0%	30%	43%

When asked what they least like about where they currently live 'Noisy area' was the most frequently nominated reason for total respondents (22%). 'Lack of parking spaces available' (10%), 'Poor infrastructure' (8%) and 'Unfriendly/annoying/undesirable neighbours' (6%) were also nominated by total respondents.

Please refer to the chart on the following page.

Q6. What Do You Least Like About Where You Currently Live? - Top 5



Question 7 - I would now like to seek your opinion on a series of features that could apply to the Adelaide City Centre. When I mention the Adelaide City Centre I am referring to the area bounded by North Terrace, West Terrace, South Terrace and East Terrace.

I will read out a feature and then ask you how important that feature was when you chose the Adelaide City Centre as a place to live with 10 being very important through to 1 being not at all important.

THEN FOR EACH STATEMENT WITH AN IMPORTANCE SCORE OF 5 OR MORE

And how satisfied are you with this aspect of city living with 10 being very satisfied through to 1 being not at all satisfied?

The following statements were provided to the survey respondents who were then asked to rank the attributes in importance when choosing an area to live and satisfaction of this aspect of city living:

- A good place to bring up kids
- A premium address
- A safe & secure place to live
- A tranquil place to live
- Access to a range of entertainment options
- Access to interesting festivals & events
- Access to sporting facilities
- Access to recreation facilities
- Bike friendly
- Cafés & restaurants
- Childcare facilities
- Convenient car parking
- Convenient for private schools
- Convenient for public schools
- Convenient for universities
- Convenient for weekly shopping
- Convenient to work or place of study
- Private outdoor area
- Reduced reliance on a car
- Easy to walk around
- Lots of parks with trees
- Medical facilities and services
- Public libraries
- Safe areas for children to play outdoors
- Specialty shops such as a butcher, greengrocer & newsagent
- Tree lined streets
- A vibrant & lively place to live
- Good public transport

The following table indicates the attributes ranked by importance (mean score) and the corresponding satisfaction mean score for each attribute.

	Importance Mean Score	Satisfaction	
	Sample Size = 115	Sample Size	Mean Score
Easy to walk around	8.9	114	9.0
Lots of parks with trees	8.6	111	8.8
Cafés & restaurants	8.4	112	8.8
A safe & secure place to live	8.2	107	8.5
Tree lined streets	8.1	108	8.7
Access to a range of entertainment options	8.0	107	8.4
Access to interesting festivals & events	7.7	107	8.3
Medical facilities and services	7.7	105	8.4
Good public transport	7.6	99	8.2
Convenient for weekly shopping	7.6	103	8.2
A tranquil place to live	7.2	100	7.8
A vibrant & lively place to live	7.1	101	8.0
Access to recreation facilities	7.0	97	8.0
Private outdoor area	7.0	96	7.7
Specialty shops such as a butcher, greengrocer & newsagent	7.0	97	7.3
Public libraries	6.8	95	8.0
Reduced reliance on a car	6.6	91	8.2
Convenient car parking	5.9	77	6.8
Bike friendly	5.9	76	7.4
Access to sporting facilities	5.7	76	7.4
Convenient to work or place of study	5.0	61	7.9
A premium address	4.6	64	7.9
Convenient for universities	3.6	38	7.8
A good place to bring up kids	3.1	35	5.9
Safe areas for children to play outdoors	3.0	32	7.4
Convenient for public schools	2.0	16	7.2
Convenient for private schools	1.9	14	6.4
Childcare facilities	1.9	14	5.8

This highlights that the following features are strongly associated (70% or higher with a ranking of 8 to 10 of importance) with the Adelaide CBD by all respondents. The most important features nominated by total respondents when they chose the Adelaide city centre as a place to live followed by the associated satisfaction levels are (mean score from 1 to 10):

- Easy to walk around – 8.9 importance – 9.0 satisfaction
- Lots of parks with trees – 8.6 importance – 8.8 satisfaction
- Cafés & restaurants – 8.4 importance – 8.8 satisfaction
- A safe & secure place to live – 8.2 importance – 8.5 satisfaction
- Tree lined streets – 8.1 importance – 8.7 satisfaction
- Access to a range of entertainment options – 8.0 importance – 8.4 satisfaction

4.4 Transport Trends

Question 8 - In the previous question you rated 'Good public transport as important to you'. How satisfied are you with the following aspects of public transport with 10 being very satisfied through to 1 being not at all satisfied?

The following statements were provided to the survey respondents who rated 'Good public transport' as 5 or more in importance in the previous question. Respondents were then asked to rate their satisfaction on the following specific aspects of public transport:

- Proximity to your home
- Value for money
- Feeling safe using the service
- Reliability of the service
- Frequency of the service
- Ability to easily get to where you want to go
- Proximity to your workplace or place of study

The following table highlights that 99 respondents (86% of total respondents) gave 'Good public transport' a score of 5 or more out of a possible 10 in terms of importance when they chose the Adelaide city centre as a place to live. The mean score for the level of satisfaction with the associated attribute is shown in the table.

This highlights that in terms of 'Good public transport' there is a very high level of satisfaction associated with:

- Proximity to your home
- Value for money
- Feeling safe using the service

There is a high level of satisfaction associated with:

- Frequency of the service
- Reliability of the service
- Ability to easily get to where you want to go

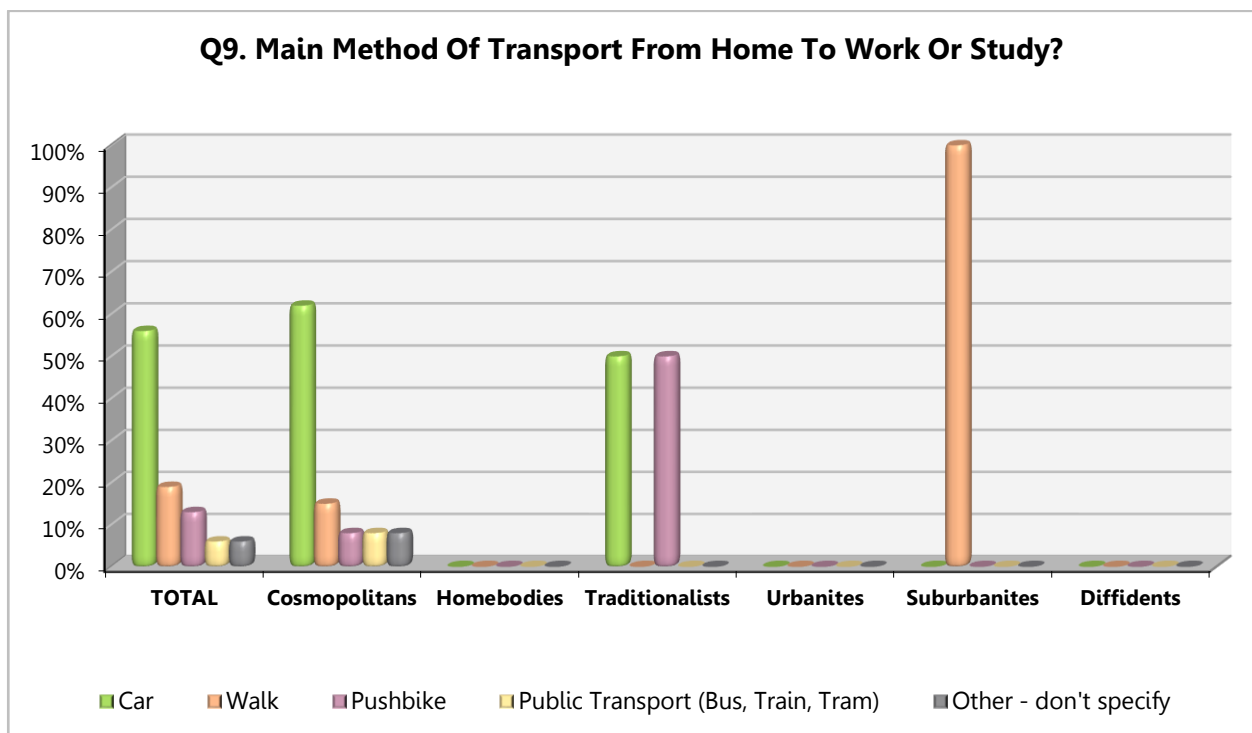
There is a low level of satisfaction associated with 'Proximity to your workplace or place of study'.

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	99	74	3	6	1	10	5
Proximity to your home	8.3	8.6	4.7	6.7	8.0	7.6	9.6
Value for money	8.2	8.5	5.7	7.0	5.0	8.1	6.6
Feeling safe using the service	8.2	8.6	4.0	6.5	6.0	7.3	8.2
Frequency of the service	7.7	8.1	5.0	6.5	8.0	6.8	7.0
Reliability of the service	7.6	8.0	3.3	6.0	8.0	6.9	7.2
Ability to easily get to where you want to go	7.5	7.8	4.3	6.3	8.0	6.7	8.2
Proximity to your workplace or place of study	4.3	4.4	2.7	3.2	8.0	2.9	7.6

IF PRIMARY PLACE OF WORK OR STUDY POSTCODE IS NOT 5000

Question 9 - What is your main method of transport from your home to where you work or study?

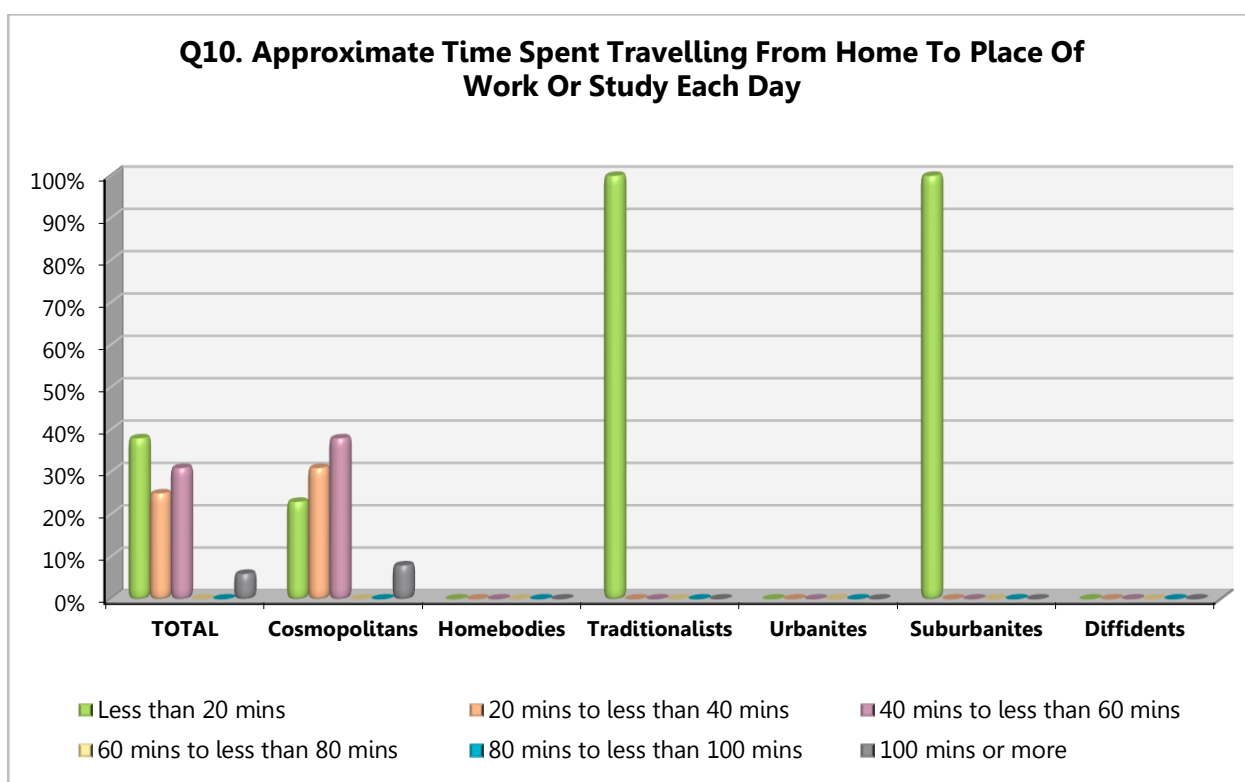
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	16	13	0	2	0	1	0
Car	56%	62%	0%	50%	0%	0%	0%
Walk	19%	15%	0%	0%	0%	100%	0%
Pushbike	13%	8%	0%	50%	0%	0%	0%
Public Transport (Bus, Train, Tram)	6%	8%	0%	0%	0%	0%	0%
Other - don't specify	6%	8%	0%	0%	0%	0%	0%



This question was asked of those respondents whose postcode for their primary place of work or study location is not 5000 (14% of the total sample). Over half of these respondents drive their car to work or study (56%). Walking was nominated by 19% of these respondents while 13% of these respondents ride a pushbike to work/study (caution small sample size).

Question 10 - Approximately how much time do you spend travelling from your home to where you work or study each day including the return trip?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	16	13	0	2	0	1	0
Less than 20 mins	38%	23%	0%	100%	0%	100%	0%
20 mins to less than 40 mins	25%	31%	0%	0%	0%	0%	0%
40 mins to less than 60 mins	31%	38%	0%	0%	0%	0%	0%
60 mins to less than 80 mins	0%	0%	0%	0%	0%	0%	0%
80 mins to less than 100 mins	0%	0%	0%	0%	0%	0%	0%
100 mins or more	6%	8%	0%	0%	0%	0%	0%

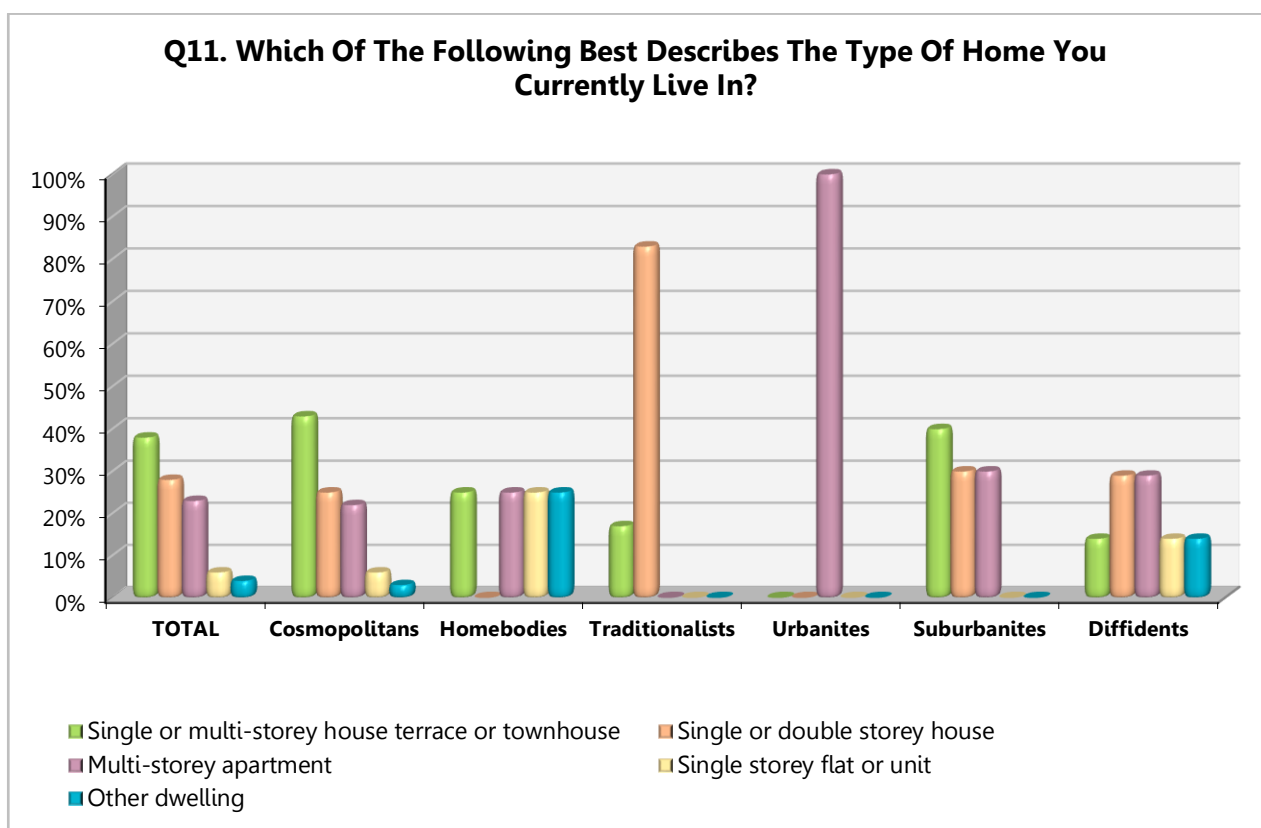


Over a third of those respondents who work or study outside of the Adelaide city centre spend less than 20 minutes travelling to work or study and home again each day (38%) with a further 25% spending between 20 minutes and 40 minutes travelling. A small proportion of these respondents (6%) spend over 100 minutes every day travelling from the Adelaide city centre to their place of work or study (caution small sample size).

4.5 Current Housing Type

Question 11 - Which of the following best describes the type of home you currently live in?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Single or multi-storey terrace or townhouse	38%	43%	25%	17%	0%	40%	14%
Single or double storey house	28%	25%	0%	83%	0%	30%	29%
Multi-storey apartment	23%	22%	25%	0%	100%	30%	29%
Single storey flat or unit	6%	6%	25%	0%	0%	0%	14%
Other dwelling	4%	3%	25%	0%	0%	0%	14%
Not sure	1%	1%	0%	0%	0%	0%	0%



Over a third of total respondents (38%) stated they are currently living in a single or multi- storey terrace or townhouse. Single or double storey houses and multi-storey apartments were also frequently nominated by respondents (28% and 23% respectively).

4.6 Apartment Living Perceptions

Question 12 - What do you find most attractive about living in an apartment?

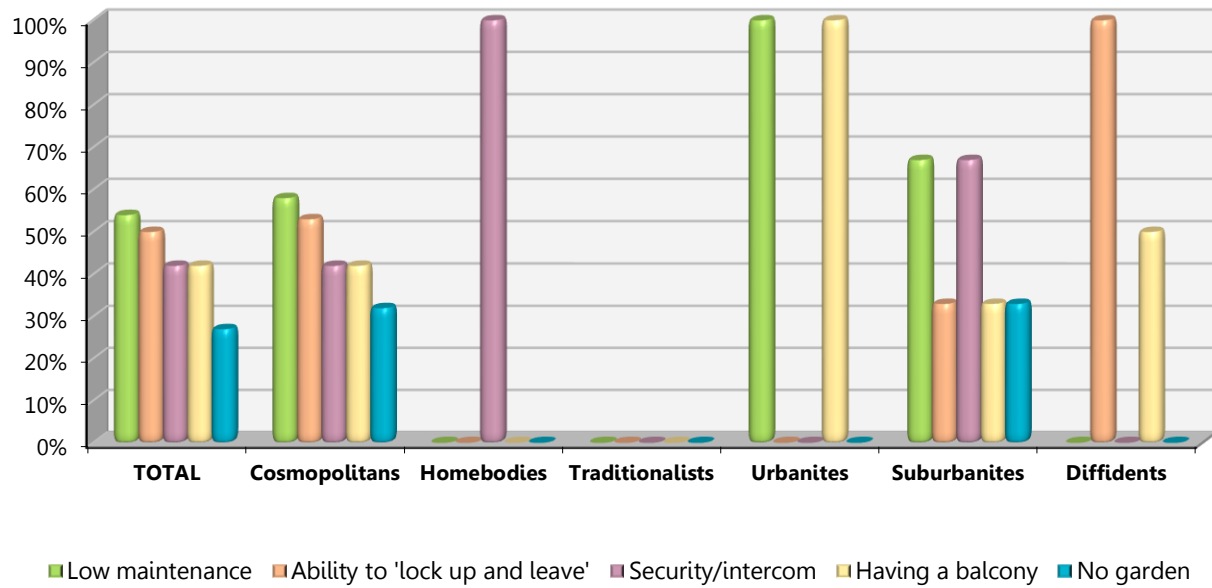
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	26	19	1	0	1	3	2
Low maintenance	54%	58%	0%	0%	100%	67%	0%
Ability to 'lock up and leave'	50%	53%	0%	0%	0%	33%	100%
Security/intercom	42%	42%	100%	0%	0%	67%	0%
Having a balcony	42%	42%	0%	0%	100%	33%	50%
No garden	27%	32%	0%	0%	0%	33%	0%
Price - value for money	23%	32%	0%	0%	0%	0%	0%
Small size	15%	16%	0%	0%	0%	33%	0%
Views	15%	21%	0%	0%	0%	0%	0%
Common areas maintained by someone else	12%	16%	0%	0%	0%	0%	0%
Shared facilities such as laundry and storage	4%	5%	0%	0%	0%	0%	0%
Other	19%	16%	0%	0%	0%	33%	50%

This question was asked of those respondents who indicated they live in a multi-storey apartment. Please note this is a small sample size so caution should be exercised in interpreting the findings.

The low maintenance required was the most attractive feature for 54% of these respondents, while the ability to **'lock up and leave' was most liked by 50% of respondents**. Other nominated features include **security/intercoms** and having a balcony (both 42% of respondents). Other reasons not listed but provided by respondents include convenience, lots of friends to socialise with, close to school, privacy and the style of living in the city.

Please refer to the chart on the following page.

Q12. What Do You Find Most Attractive About Living In An Apartment? - Top 5

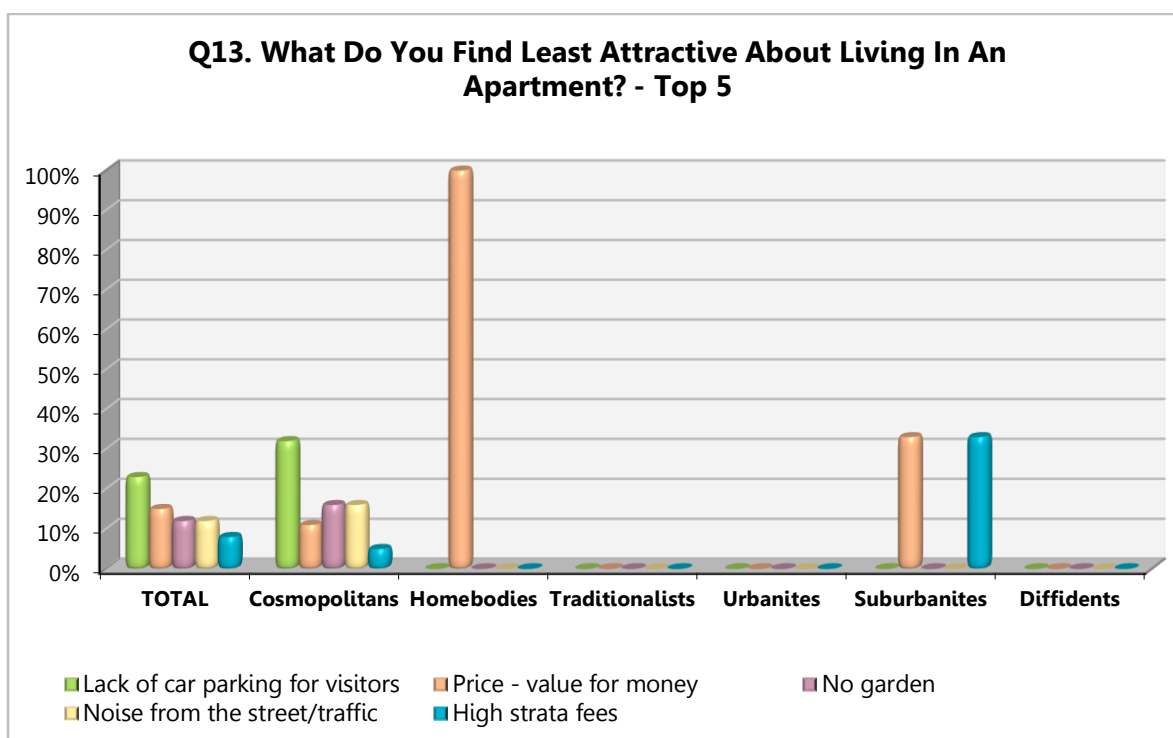


Question 13 - And what do you find least attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidits
Sample Size (caution small sample size)	26	19	1	0	1	3	2
Lack of car parking for visitors	23%	32%	0%	0%	0%	0%	0%
Price - value for money	15%	11%	100%	0%	0%	33%	0%
No garden	12%	16%	0%	0%	0%	0%	0%
Noise from the street/traffic	12%	16%	0%	0%	0%	0%	0%
High strata fees	8%	5%	0%	0%	0%	33%	0%
No privacy	4%	5%	0%	0%	0%	0%	0%
No/inadequate storage	4%	5%	0%	0%	0%	0%	0%
Nothing	31%	32%	0%	0%	0%	33%	50%
Other	12%	5%	0%	0%	100%	0%	50%

This question was asked of those respondents who indicated they lived in a multi-storey apartment. Please note this is a small sample size so caution should be exercised in interpreting the findings.

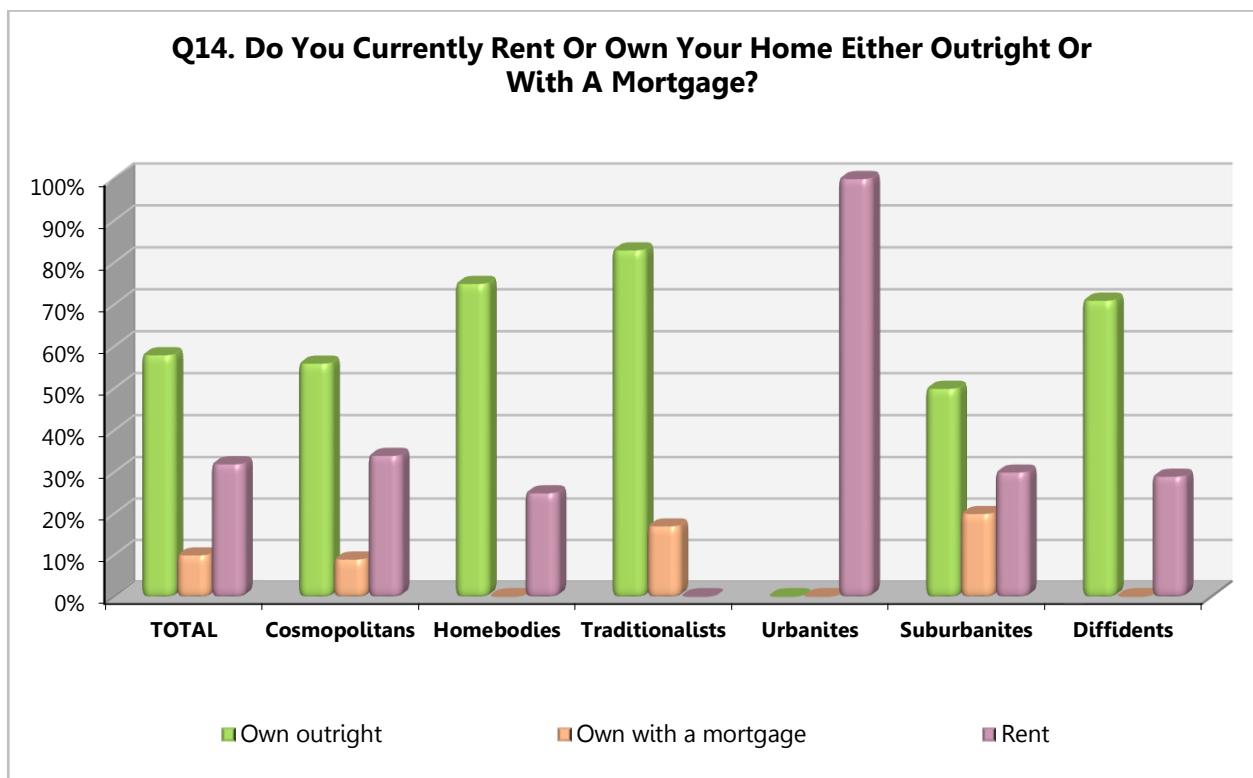
Lack of car parking for visitors was the least attractive feature for 23% of these respondents. Price and value for money (15%), no garden and noise from the street/traffic (12% each) were also nominated by respondents as the least attractive feature of living in an apartment. Other reasons not listed provided by respondents included always waiting for an elevator, no ventilation in the apartment and not having a shed.



4.7 Current Residence - Tenure and Value

Question 14 - Do you currently rent or own your home either outright or with a mortgage?

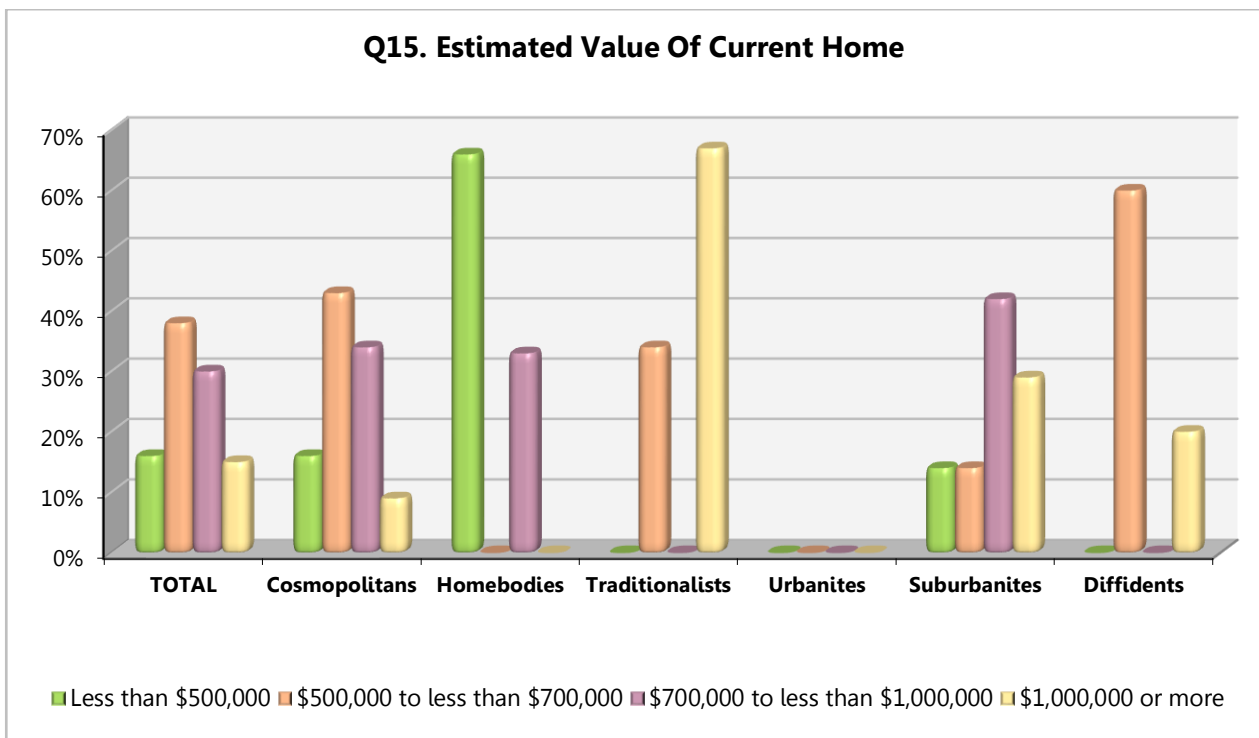
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Own outright	58%	56%	75%	83%	0%	50%	71%
Own with a mortgage	10%	9%	0%	17%	0%	20%	0%
Rent	32%	34%	25%	0%	100%	30%	29%
Other tenure type	0%	0%	0%	0%	0%	0%	0%



Over half of total respondents own their own home outright (58%) with a further 10% owning their own home with a mortgage and the remaining 32% renting.

Question 15 - What would you estimate to be the value of your current home (interviewer to start at \$400,000)?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	78	57	3	6	0	7	5
\$300,000 to less than \$400,000	3%	2%	33%	0%	0%	0%	0%
\$400,000 to less than \$500,000	13%	14%	33%	0%	0%	14%	0%
\$500,000 to less than \$600,000	23%	25%	0%	17%	0%	14%	40%
\$600,000 to less than \$700,000	15%	18%	0%	17%	0%	0%	20%
\$700,000 to less than \$800,000	9%	11%	0%	0%	0%	14%	0%
\$800,000 to less than \$900,000	12%	14%	0%	0%	0%	14%	0%
\$900,000 to less than \$1,000,000	9%	9%	33%	0%	0%	14%	0%
\$1,000,000 or more	15%	9%	0%	67%	0%	29%	20%
Not sure	1%	0%	0%	0%	0%	0%	20%

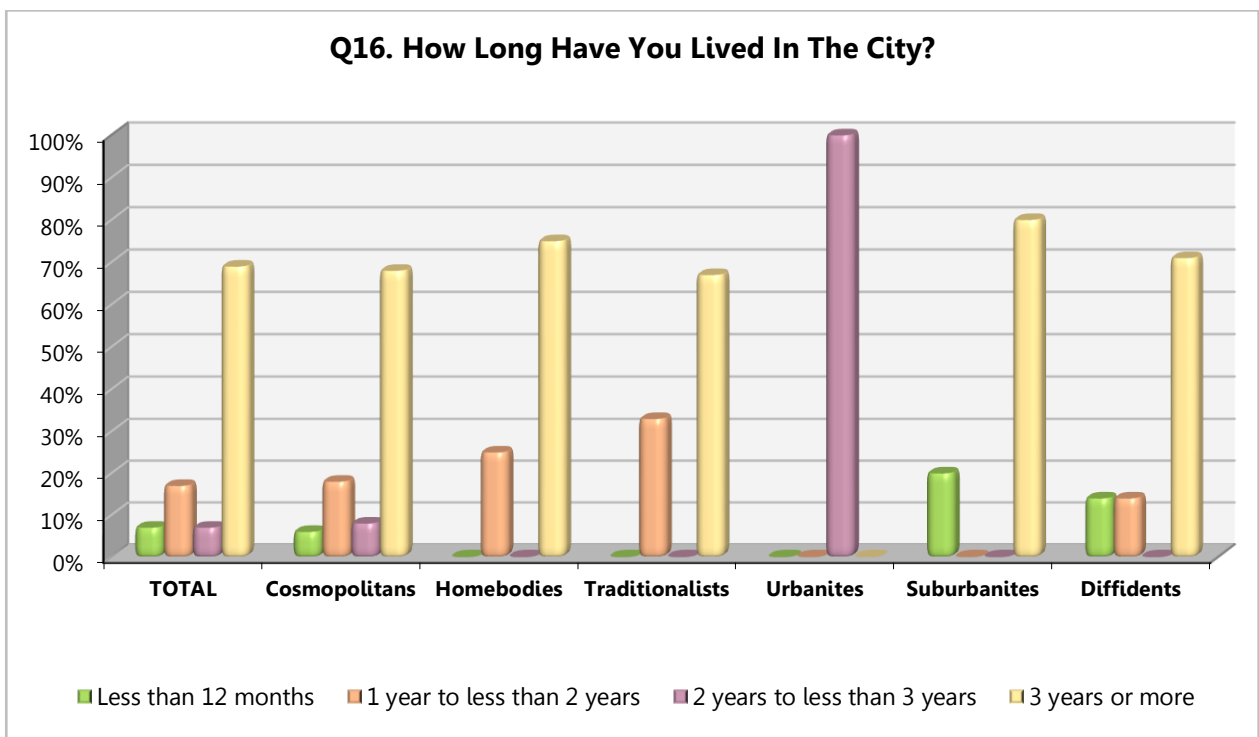


This question was asked of those respondents (68% of total respondents) who do not rent their property. Over half of these respondents estimate the value of their current home at less than \$700,000 (54%) with a further 15% valuing their current home at more than \$1,000,000.

4.8 City Living - Trends, Rationale and Satisfaction

Question 16 - How long have you lived in the City?

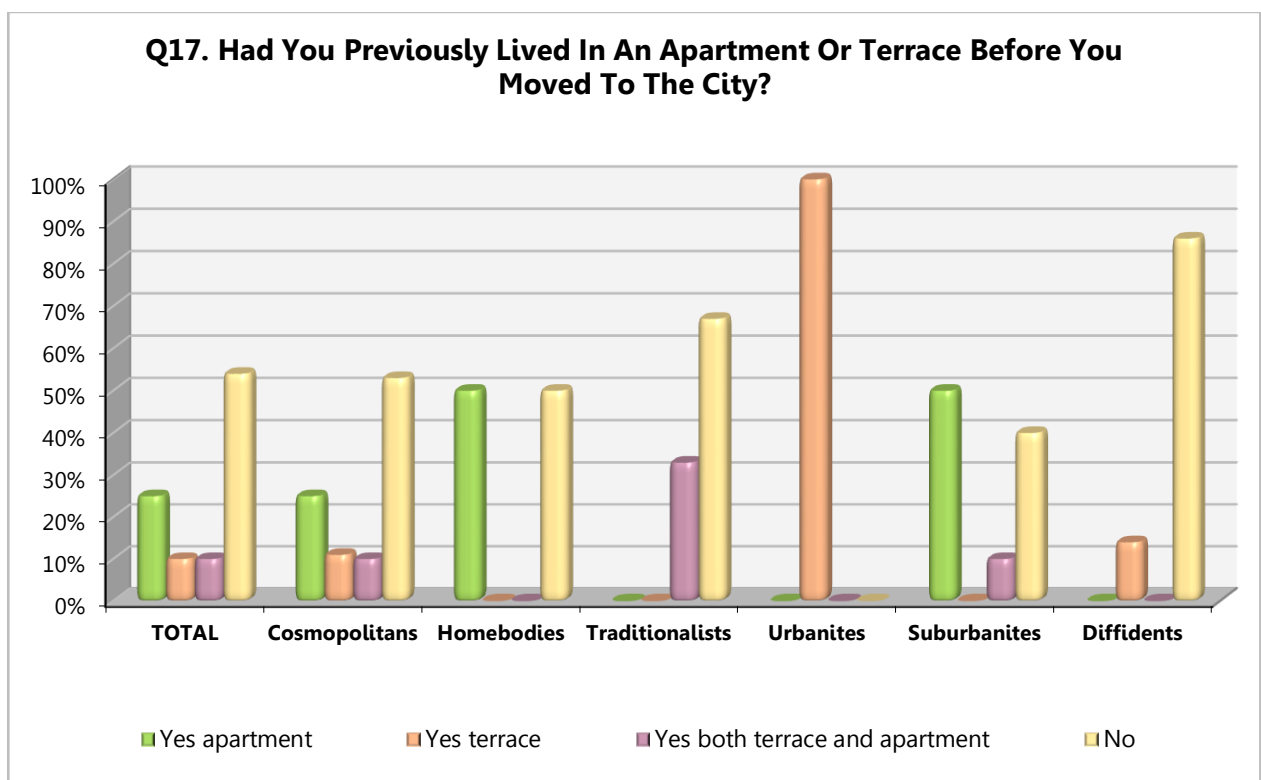
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Less than 12 months	7%	6%	0%	0%	0%	20%	14%
1 year to less than 2 years	17%	18%	25%	33%	0%	0%	14%
2 years to less than 3 years	7%	8%	0%	0%	100%	0%	0%
3 years or more	69%	68%	75%	67%	0%	80%	71%



Over two-thirds of total respondents have lived in the City for three years or more (69%) with nearly a quarter of total respondents living in the City for less than two years (7% less than 12 months and 17% between one and two years).

Question 17 - Had you previously lived in an apartment or terrace before you moved to the City?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Yes apartment	25%	25%	50%	0%	0%	50%	0%
Yes terrace	10%	11%	0%	0%	100%	0%	14%
Yes both terrace and apartment	10%	10%	0%	33%	0%	10%	0%
No	54%	53%	50%	67%	0%	40%	86%

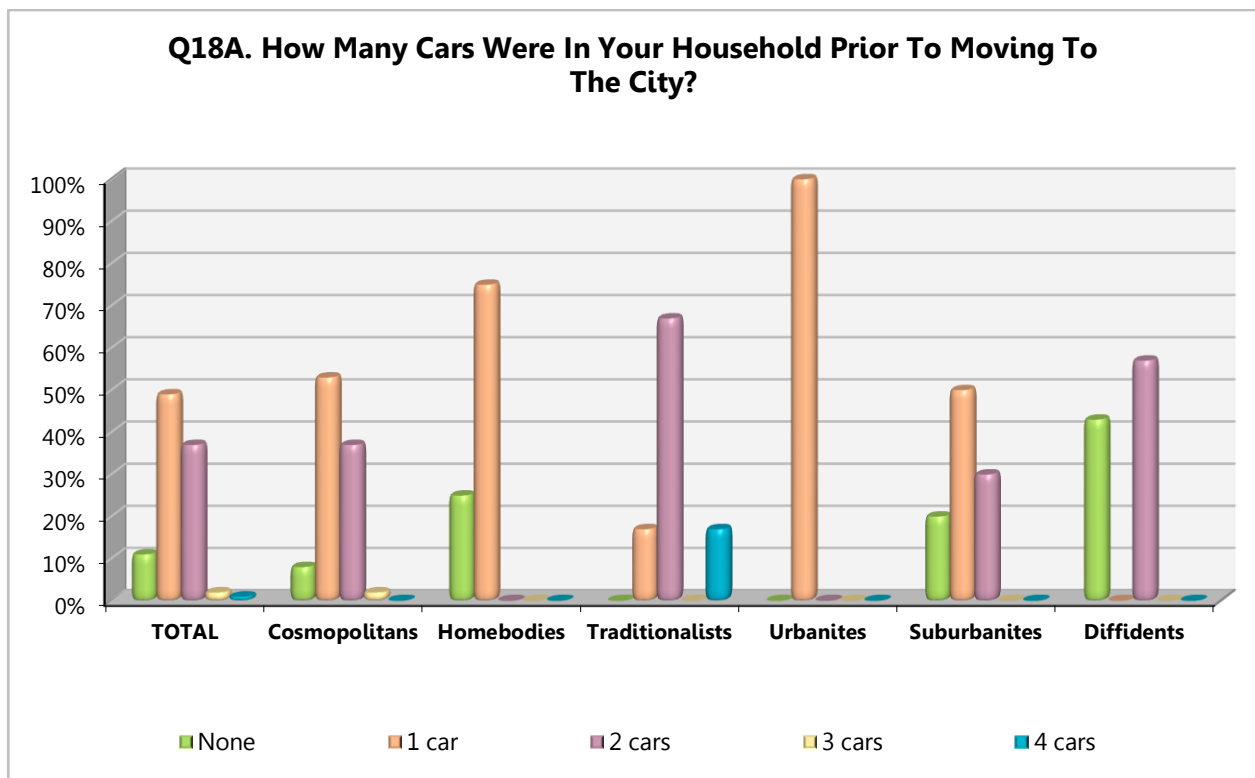


Nearly half of total respondents have previously lived in an apartment (25%), and terrace (10%) or both a terrace and apartment (10%).

Question 18 - How many cars were in your household prior to moving to the City and how many cars do you now have that you park in the City?

Question 18a - Car ownership prior to moving to the City?

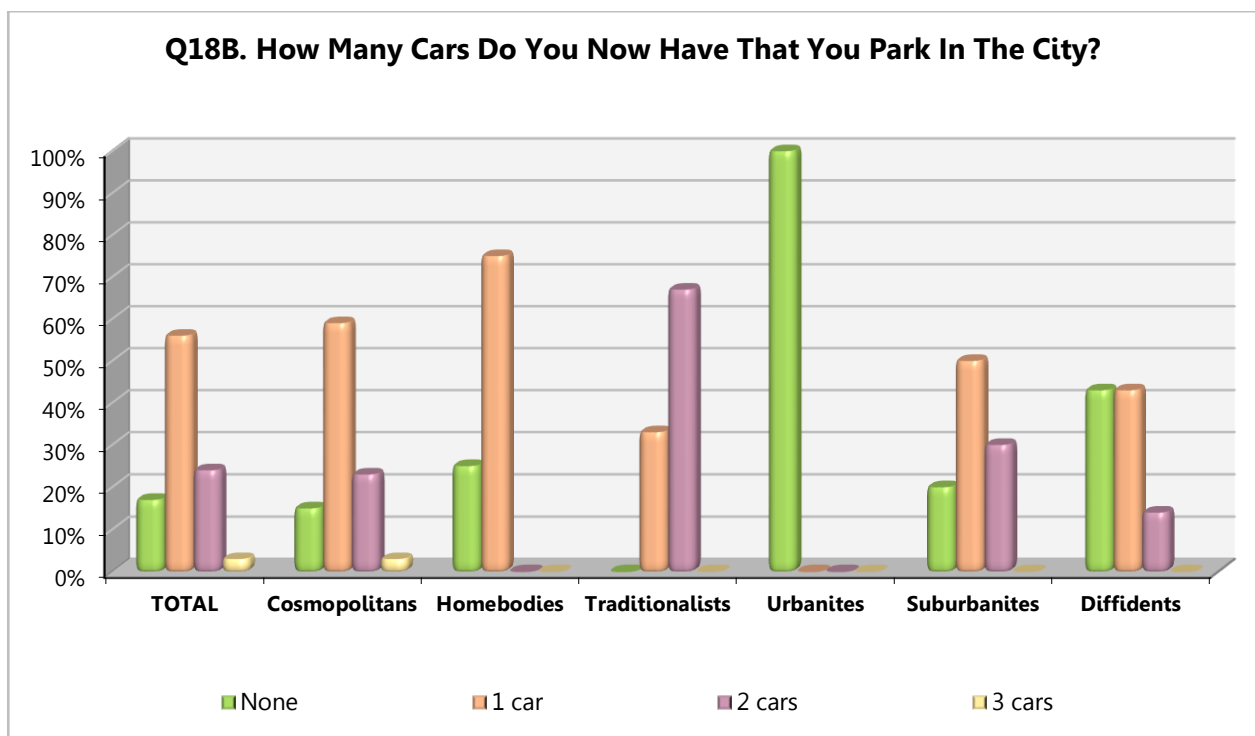
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
None	11%	8%	25%	0%	0%	20%	43%
1 car	49%	53%	75%	17%	100%	50%	0%
2 cars	37%	37%	0%	67%	0%	30%	57%
3 cars	2%	2%	0%	0%	0%	0%	0%
4 cars	1%	0%	0%	17%	0%	0%	0%



Nearly half of total respondents had one car in their household prior to moving to the City (49%). A further 37% had two cars, while 11% of total respondents had no cars in their household.

Question 18b - Car ownership after moving to the City?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
None	17%	15%	25%	0%	100%	20%	43%
1 car	56%	59%	75%	33%	0%	50%	43%
2 cars	24%	23%	0%	67%	0%	30%	14%
3 cars	3%	3%	0%	0%	0%	0%	0%



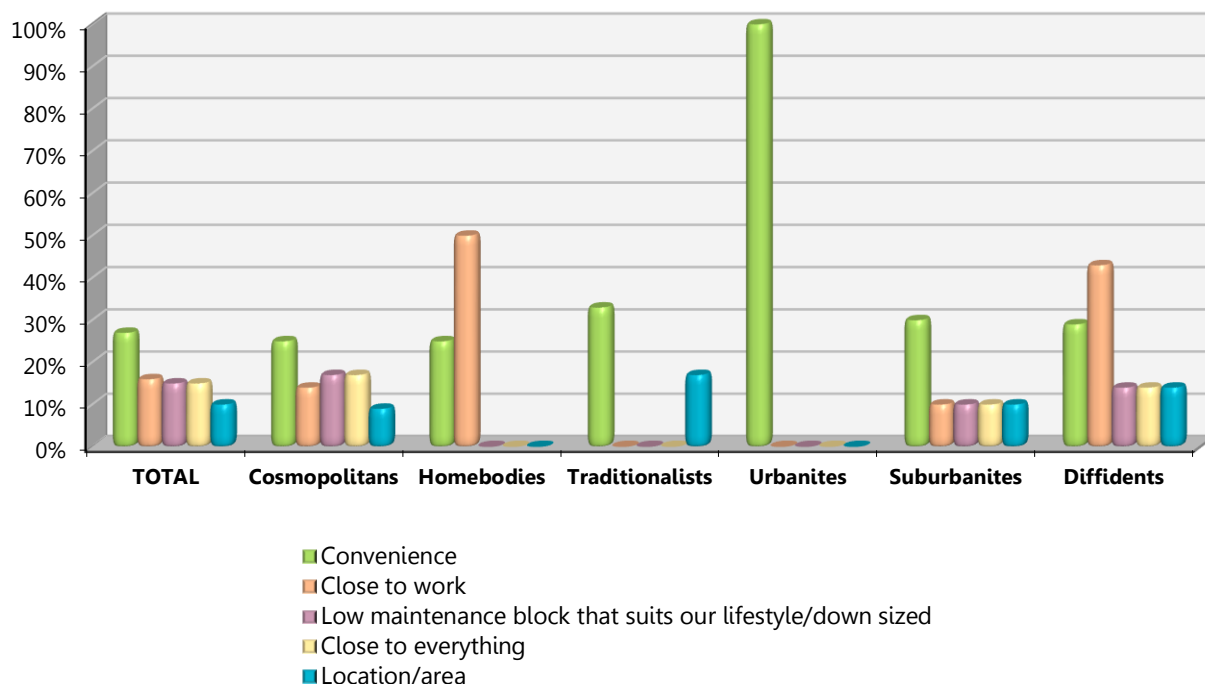
After moving to the City, total respondents have decreased the number of cars in their households. Over half of total respondents now have one car in their household (56%). Nearly a quarter of total respondents have two cars (24%), while 17% of total respondents have no cars in their household.

Question 19 - What was the main reason for you moving to the City and to what extent have your expectations been met in relation to this reason for moving with 10 being all expectations met through to 1 being no expectations have been met?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Convenience	27%	25%	25%	33%	100%	30%	29%
Close to work	16%	14%	50%	0%	0%	10%	43%
Low maintenance block that suits our lifestyle/down sized	15%	17%	0%	0%	0%	10%	14%
Close to everything	15%	17%	0%	0%	0%	10%	14%
Location/area	10%	9%	0%	17%	0%	10%	14%
I like the lifestyle	10%	13%	0%	17%	0%	0%	0%
Change in personal circumstances, i.e. family, relationships, widowed, retired	9%	8%	0%	17%	0%	20%	0%
Convenient to the city	8%	8%	0%	0%	0%	10%	14%
Close to where I live	8%	7%	0%	0%	0%	10%	29%
It is a safe and secure place to live/a place where I feel safe/lock up and leave	6%	6%	0%	17%	0%	10%	0%
Convenient for shopping/markets	4%	3%	25%	0%	0%	10%	0%
Convenient for schools/kindergarten/childcare for my children	3%	1%	0%	17%	0%	10%	0%
Close to entertainment and recreation facilities	3%	3%	0%	0%	0%	10%	0%
Close to medical facilities	3%	3%	0%	0%	0%	0%	0%
Close to restaurants or cafes	3%	3%	25%	0%	0%	0%	0%
Proximity to public transport	2%	1%	0%	0%	0%	0%	14%
Good neighbours/neighbourhood	1%	1%	0%	0%	0%	0%	0%
Open space	1%	0%	0%	17%	0%	0%	0%

The main reason for moving to the City for over a quarter of total respondents was the convenience of the location (27%). 'Close to work' (16%), 'Low maintenance / downsizing' and 'Close to everything' (15% each) were other frequently nominated reasons provided for moving to the City.

Q19. What was the main reason for you moving to the City? - Top 5



	Sample Size	Extent Expectations Met (score 1 to 10)									
		None met 1	2	3	4	5	6	7	8	9	All met 10
Total Respondents	115	0%	0%	1%	0%	1%	2%	5%	16%	25%	50%
Cosmopolitans	87	0%	0%	0%	0%	0%	2%	6%	14%	25%	53%
Homebodies	4	0%	0%	0%	0%	0%	0%	25%	50%	25%	0%
Traditionalists	6	0%	0%	0%	0%	0%	0%	0%	0%	50%	50%
Urbanites	1	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%
Suburbanites	10	0%	0%	0%	0%	10%	0%	0%	30%	20%	40%
Diffidants	7	0%	0%	14%	0%	0%	0%	0%	14%	0%	71%

The above table highlights that 50% of total respondents feel that all of their expectations have been met (score of 10 out of 10) in moving to the City with a further 25% giving a score of 9 and 16% a score of 8. Overall 91% of respondents gave a score of 8 or more indicating a very high level of expectations being met.

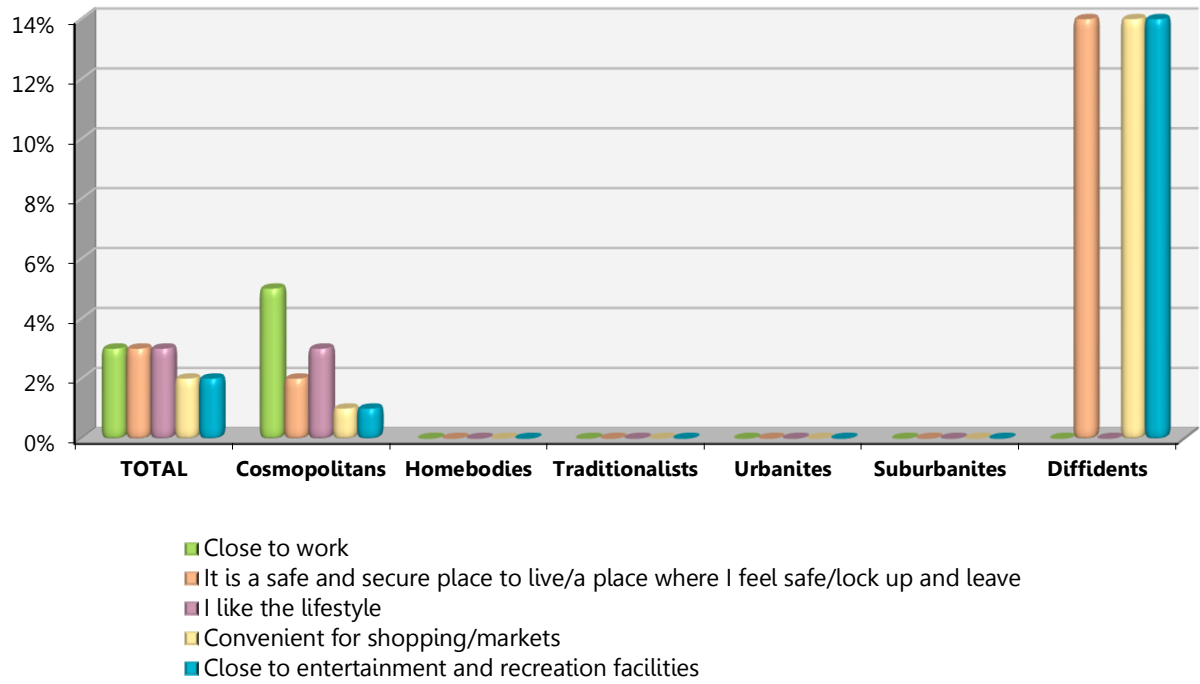
Question 20 - Were there any other reasons for you moving to the City?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	115	87	4	6	1	10	7
Close to work	3%	5%	0%	0%	0%	0%	0%
It is a safe and secure place to live/a place where I feel safe/lock up and leave	3%	2%	0%	0%	0%	0%	14%
I like the lifestyle	3%	3%	0%	0%	0%	0%	0%
Convenient for shopping/markets	2%	1%	0%	0%	0%	0%	14%
Close to entertainment and recreation facilities	2%	1%	0%	0%	0%	0%	14%
Convenience	2%	2%	0%	0%	0%	0%	0%
Low maintenance block that suits our lifestyle/down sized	1%	0%	0%	0%	0%	0%	14%
Close to family	1%	1%	0%	0%	0%	0%	0%
Good neighbours/neighbourhood	1%	1%	0%	0%	0%	0%	0%
Proximity to public transport	1%	0%	0%	0%	0%	0%	14%
Location/area	1%	1%	0%	0%	0%	0%	0%
Change in personal circumstances, i.e. family, relationships, widowed, retired	1%	1%	0%	0%	0%	0%	0%
No other reasons	86%	85%	100%	100%	100%	100%	57%

Other reasons nominated by total respondents for moving to the City include proximity to work, safety and security, and the lifestyle (3% each). Convenience for shopping/markets, proximity to entertainment and recreation facilities, and convenience were also nominated (2% each).

Please refer to the chart on the following page.

Q20. Other Reasons For Moving To The City - Top 5

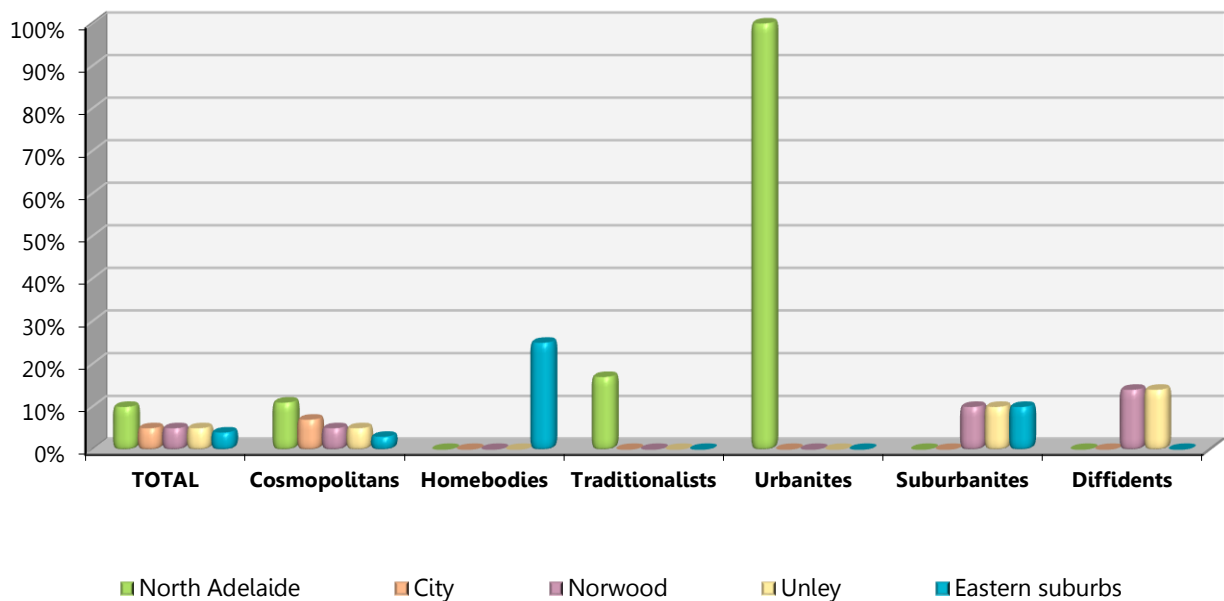


4.9 Competitor Suburbs and Influencing Factors

Question 21 - Which other areas did you consider before moving to the City?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	115	87	4	6	1	10	7
North Adelaide	10%	11%	0%	17%	100%	0%	0%
City	5%	7%	0%	0%	0%	0%	0%
Norwood	5%	5%	0%	0%	0%	10%	14%
Unley	5%	5%	0%	0%	0%	10%	14%
Eastern suburbs	4%	3%	25%	0%	0%	10%	0%
Hills	4%	5%	0%	17%	0%	0%	0%
Parkside	4%	5%	0%	0%	0%	10%	0%
Beach	3%	5%	0%	0%	0%	0%	0%
Glenelg	3%	2%	0%	0%	0%	0%	14%
Inner city/suburbs	3%	1%	0%	17%	0%	0%	14%
Mile End	3%	3%	0%	0%	0%	0%	0%
Western suburbs/area	3%	2%	0%	17%	0%	0%	0%
Richmond	2%	1%	0%	0%	0%	0%	14%
Southern side/area	2%	1%	0%	0%	0%	10%	0%
Suburbs - all of them	2%	1%	25%	0%	0%	0%	0%
Torrensville	2%	2%	0%	0%	0%	0%	0%
Wayville	2%	1%	0%	0%	0%	10%	0%
Bowden	1%	1%	0%	0%	0%	0%	0%
City Fringe	1%	1%	0%	0%	0%	0%	0%
Clarence Park	1%	1%	0%	0%	0%	0%	0%
Country side	1%	1%	0%	0%	0%	0%	0%
Gilberton	1%	1%	0%	0%	0%	0%	0%
Hyde Park	1%	1%	0%	0%	0%	0%	0%
Kent Town	1%	0%	0%	0%	0%	0%	14%
Modbury	1%	1%	0%	0%	0%	0%	0%
Myrtle Bank	1%	1%	0%	0%	0%	0%	0%
Prospect	1%	1%	0%	0%	0%	0%	0%
Rose Park	1%	0%	0%	0%	0%	10%	0%
St Peters	1%	0%	0%	0%	0%	10%	0%
Tea Tree Gully	1%	1%	0%	0%	0%	0%	0%
Thebarton	1%	1%	0%	0%	0%	0%	0%
West Beach	1%	1%	0%	0%	0%	0%	0%
No other areas	54%	54%	50%	67%	0%	60%	43%

Q21. Which Other Areas Did You Consider Before Moving To The City? - Top 5



Other areas to move to considered by total respondents include North Adelaide (10%), Norwood and Unley (5% each). Eastern suburbs, the Hills, and Parkside were also considered by 4% of respondents. Over half of total respondents did not consider any other areas before moving to the City (54%).

Question 22 - To what extent did the following influence your decision to move to the city?

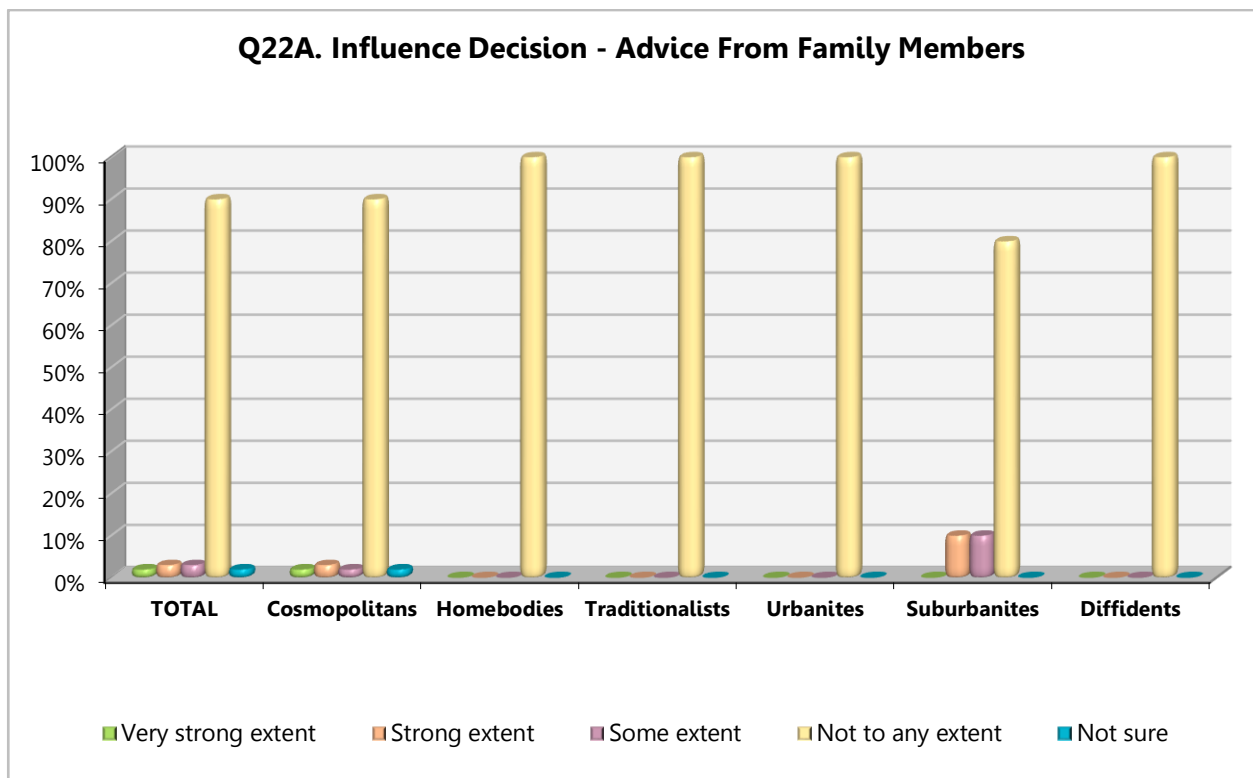
When asked to what extent advice from family members, friends or work colleagues influenced the decisions to move to the City the vast majority of total respondents indicated that advice from any of these sources had very little influence.

	Very strong extent	Strong extent	Some extent	Not to any extent	Not sure
Advice from family members	2%	3%	3%	90%	2%
Advice from friends	3%	4%	8%	83%	2%
Advice from work colleagues	1%	0%	3%	94%	2%

Please refer to the tables and charts on the following pages for a more detailed analysis.

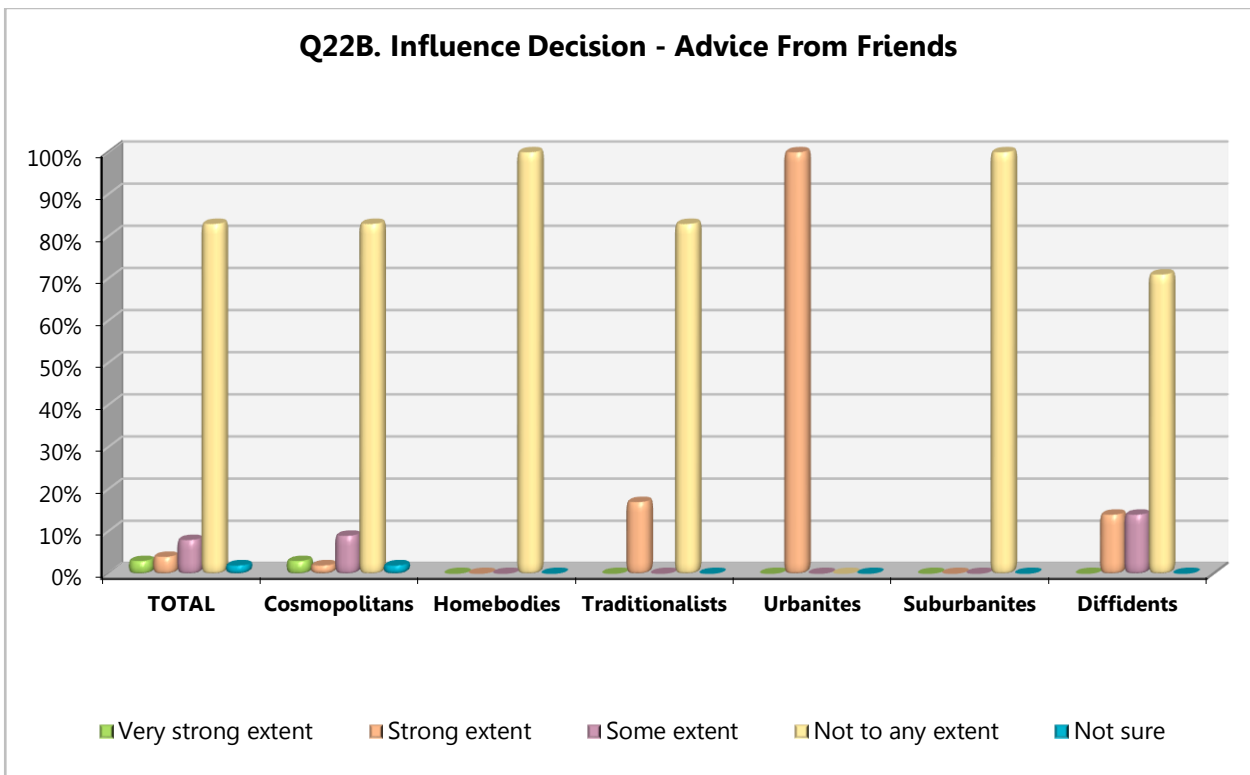
Question 22a – To what extent did advice from family members influence your decision to move to the City?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Very strong extent	2%	2%	0%	0%	0%	0%	0%
Strong extent	3%	3%	0%	0%	0%	10%	0%
Some extent	3%	2%	0%	0%	0%	10%	0%
Not to any extent	90%	90%	100%	100%	100%	80%	100%
Not sure	2%	2%	0%	0%	0%	0%	0%



Question 22b – To what extent did advice from friends influence your decision to move to the City?

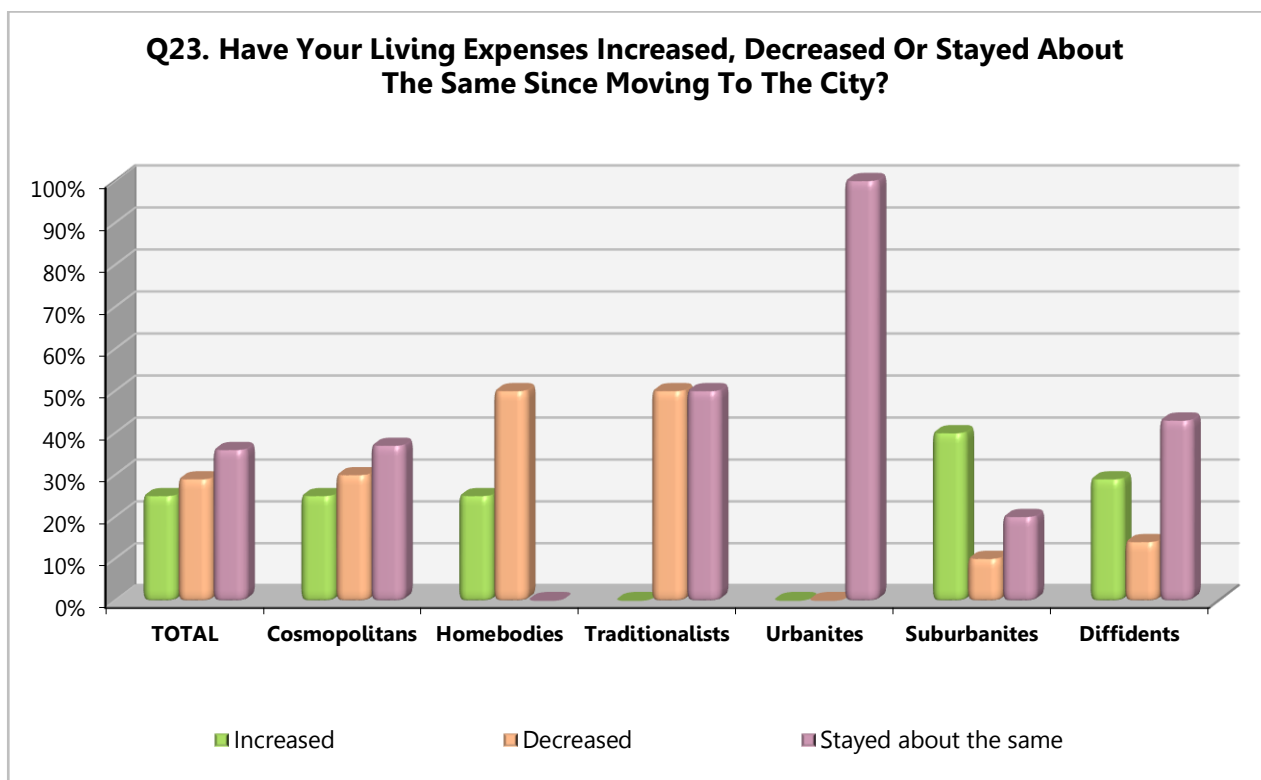
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Very strong extent	3%	3%	0%	0%	0%	0%	0%
Strong extent	4%	2%	0%	17%	100%	0%	14%
Some extent	8%	9%	0%	0%	0%	0%	14%
Not to any extent	83%	83%	100%	83%	0%	100%	71%
Not sure	2%	2%	0%	0%	0%	0%	0%



4.10 Living Expense and Leisure Time Trends

Question 23 - Have your living expenses increased, decreased or stayed about the same since moving to the City?

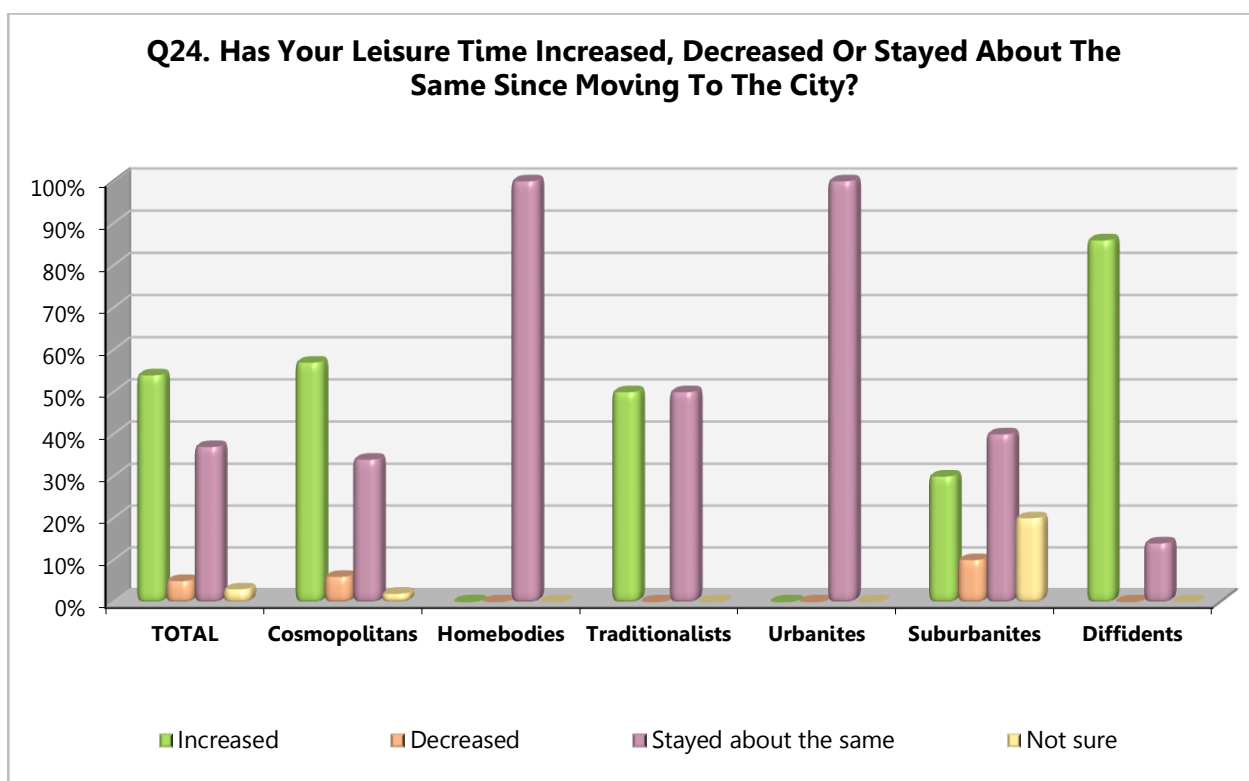
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Increased	25%	25%	25%	0%	0%	40%	29%
Decreased	29%	30%	50%	50%	0%	10%	14%
Stayed about the same	36%	37%	0%	50%	100%	20%	43%
Not sure	10%	8%	25%	0%	0%	30%	14%



Since moving to the City, living expenses have stayed the same for over a third of total respondents (36%), increased for 25% of total respondents and decreased for 29% of total respondents.

Question 24 - Has your leisure time increased, decreased or stayed about the same since moving to the City?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Increased	54%	57%	0%	50%	0%	30%	86%
Decreased	5%	6%	0%	0%	0%	10%	0%
Stayed about the same	37%	34%	100%	50%	100%	40%	14%
Not sure	3%	2%	0%	0%	0%	20%	0%



Since moving to the City, leisure time has increased for over half of total respondents (54%) and stayed about the same for a further 37% of total respondents, while 5% of total respondents claimed that their leisure time has decreased since moving to the City.

4.11 City Living Perceptions

Question 25 - In your view, which of the following statements describe the Adelaide City Centre?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	115	87	4	6	1	10	7
A Liveable City	99%	100%	100%	100%	100%	100%	86%
An Arts and Culture City	95%	95%	100%	83%	100%	90%	100%
A Beautiful City	95%	95%	100%	100%	100%	90%	86%
A Multicultural City	94%	93%	100%	100%	100%	90%	100%
An attractive City to buy a home in which to live	94%	94%	100%	100%	100%	90%	86%
A Green City	83%	80%	100%	100%	100%	80%	86%
An Environmentally Friendly City	78%	77%	100%	83%	100%	70%	86%
A Cosmopolitan City	77%	77%	75%	83%	100%	90%	57%
An attractive City to buy a home as an investment property	77%	78%	75%	83%	0%	80%	57%
A Vibrant City	71%	78%	25%	67%	100%	50%	43%
A Creative City	70%	74%	0%	50%	100%	70%	86%
A Boutique City	69%	71%	50%	67%	100%	40%	86%
A Smart City	59%	61%	75%	33%	0%	60%	57%
A Progressive City	56%	56%	50%	33%	100%	50%	71%
An Innovative City	55%	56%	50%	17%	100%	60%	57%
A City of Business	55%	55%	50%	33%	100%	40%	86%
An Entrepreneurial City	39%	40%	0%	50%	100%	10%	71%

Statements associated with Adelaide with an agreement level of 80% or more are:

- A Liveable City - 99%
- An Arts and Culture City - 95%
- A Beautiful City - 95%
- A Multicultural City - 94%
- An attractive City to buy a home in which to live - 94%
- A Green City - 83%

Fewer respondents claimed that Adelaide can be described as 'An attractive City to buy a home as an investment property' (77% of respondents).

Please refer to the chart on the following page.

Q25. Which Of The Following Statements Describe The Adelaide City Centre? - Top 10



4.12 Psychographic Segmentation

Question 26 - I would now like to ask you some questions which will help us better understand the types of people who are participating in this survey. These questions seek your opinions so there are no right or wrong answers. I will read you a statement and then ask how strongly you agree or disagree with that statement.

The responses to the following question were used to cluster the respondents into the six attitudinal market segments identified for this study.

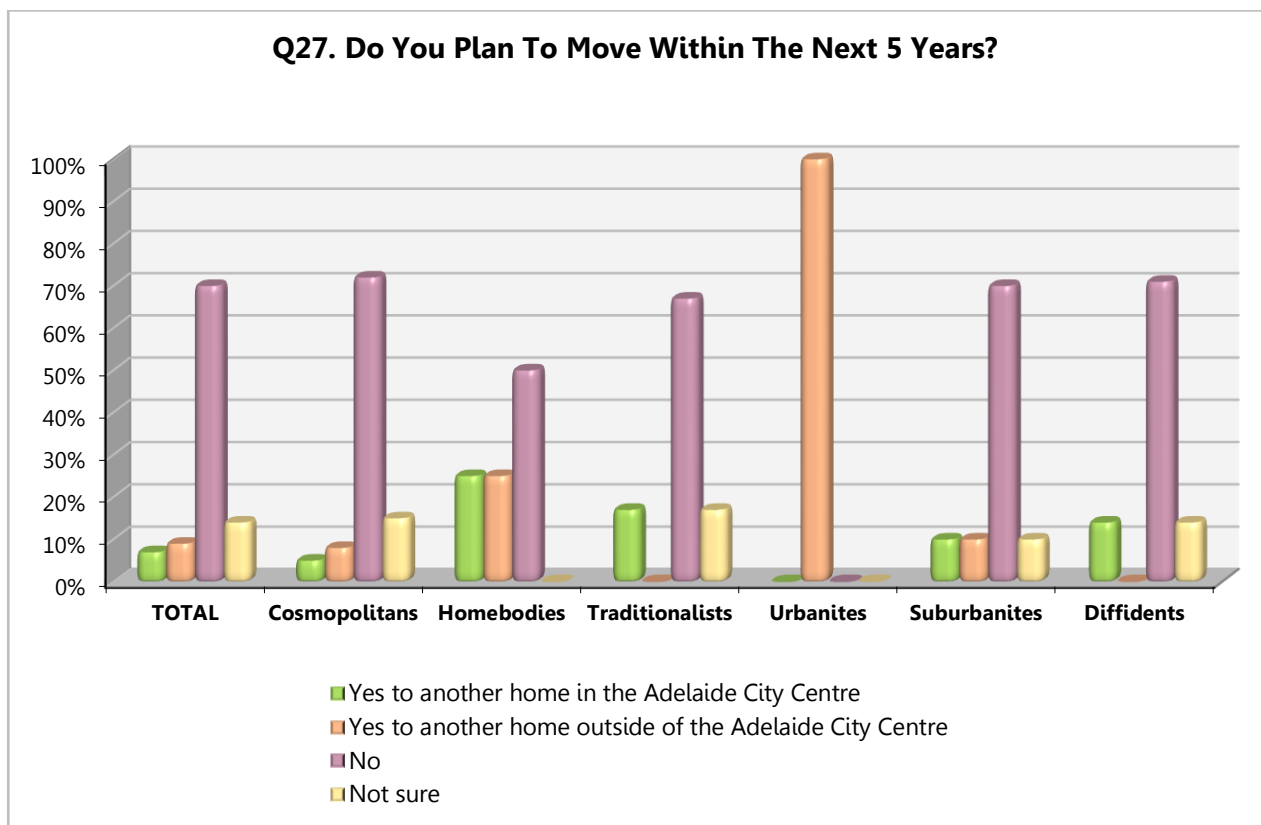
- I'd describe myself as kind of adventurous and outgoing
- I have a clear idea of my goals in life
- The idea of living in an apartment really appeals to me
- I would prefer to live in an area where most of the people come from backgrounds that are similar to my own
- I would prefer to live in a development that includes the latest in environmental initiatives
- Safety and security is an important consideration for me when I'm choosing somewhere to live
- I prefer to walk or ride my bike whenever possible instead of using my car
- I would prefer to live on a large traditional block of land
- Keeping in close contact with my family is very important to me
- I would like to live in a development that is protected by locked gates or a guard
- I'm pretty active when it comes to keeping fit or playing sport
- Peace and quiet is an important consideration for me when I'm choosing somewhere to live
- I think most people that know me well would consider me to be a confident person
- I would be prepared to pay more for electricity that is generated from renewable resources such as wind and solar, also known as 'green power'
- I'd describe myself as a bit of a homebody
- The idea of living in or very close to the city really appeals to me
- I would prefer to live in an area where all the homes are of a similar style and quality
- I think it's important that standards are set and enforced for new housing developments to protect my investment
- I like the freedom of not having to comply with rules and regulations
- I would prefer to live in a contemporary style, architecturally designed home
- I consider myself to be a cultured person
- A sense of community is an important consideration for me when I'm choosing somewhere to live
- I have travelled a lot around Australia or overseas
- I see myself as a trendsetter
- I would be prepared to pay a premium for a house that is energy efficient
- I feel really uncomfortable when I'm out of my normal environment
- I'm more concerned with what I think, than what other people think of me
- I consider myself to be a bit of a risk taker
- I don't think Australians are doing enough to combat climate change
- I think most people that know me well would consider me a competitive person
- A sense of space and openness is important to me
- I would prefer to live in an area where there is a mix of people from different backgrounds
- The value of your own home is always affected by the appearance of the surrounding homes
- I consider myself to be a well-educated person

Results of this question are described in Section 3 'Segmentation'.

4.13 Housing Purchase Intention, Budget and Features

Question 27 - Do you plan to move within the next 5 years?

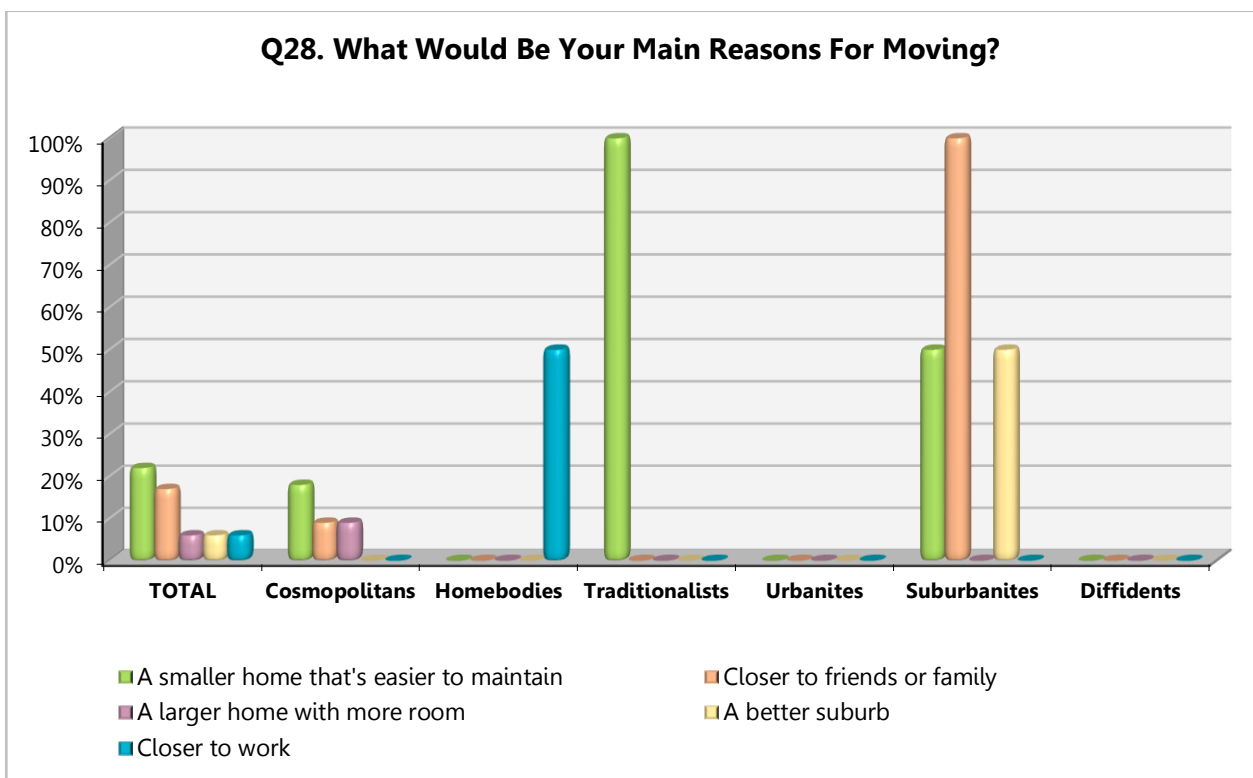
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Yes to another home in the Adelaide City Centre	7%	5%	25%	17%	0%	10%	14%
Yes to another home outside of the Adelaide City Centre	9%	8%	25%	0%	100%	10%	0%
No	70%	72%	50%	67%	0%	70%	71%
Not sure	14%	15%	0%	17%	0%	10%	14%



A relatively small percentage of total respondents are likely to move from their current home within the next five years (16%) including 7% to another home in the Adelaide city centre and 9% to another home outside of the Adelaide city centre.

Question 28 - What would be your main reasons for moving?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	18	11	2	1	1	2	1
A smaller home that's easier to maintain	22%	18%	0%	100%	0%	50%	0%
Closer to friends or family	17%	9%	0%	0%	0%	100%	0%
A larger home with more room	6%	9%	0%	0%	0%	0%	0%
A better suburb	6%	0%	0%	0%	0%	50%	0%
Closer to work	6%	0%	50%	0%	0%	0%	0%
Other	56%	64%	50%	0%	100%	0%	100%



This question was asked of those respondents who would be likely to move from their current home within the next five years (16% of total respondents - caution small sample size).

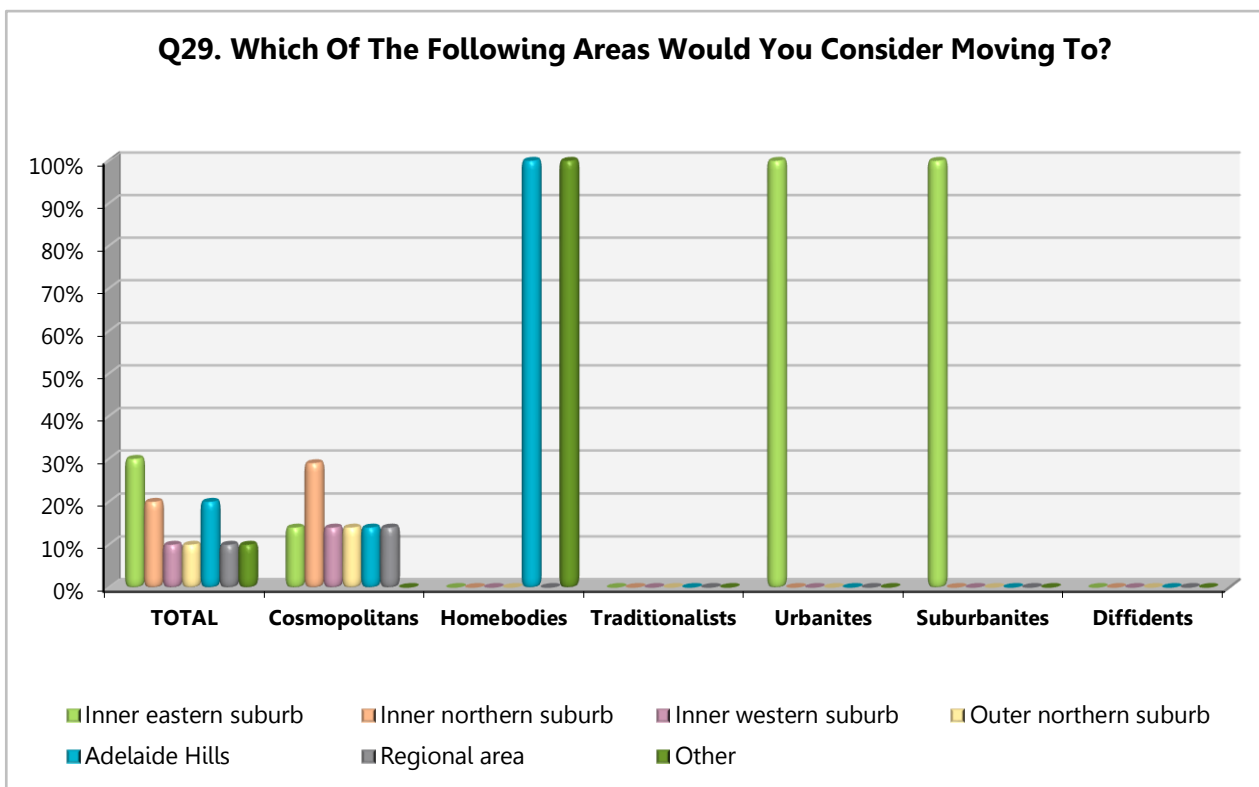
Nearly a quarter of those respondents likely to move from their current home within the next five years would be moving to a smaller **home that's easier to maintain (22%)**, while **17% nominated moving to be closer to friends or family**.

Other reasons provided by respondents include:

- A country town
- Connection to nature
- Failing health and mobility
- It was the price - a lot cheaper to live in the suburbs
- Little house with a garden
- More modern home that has less maintenance
- More space and the rents in the city are very expensive
- Single level home
- Stairs and age
- To purchase

Question 29 - Which of the following areas would you consider moving to?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	10	7	1	0	1	1	0
Inner eastern suburb	30%	14%	0%	0%	100%	100%	0%
Inner northern suburb	20%	29%	0%	0%	0%	0%	0%
Inner western suburb	10%	14%	0%	0%	0%	0%	0%
Outer northern suburb	10%	14%	0%	0%	0%	0%	0%
Adelaide Hills	20%	14%	100%	0%	0%	0%	0%
Regional area	10%	14%	0%	0%	0%	0%	0%
Other	10%	0%	100%	0%	0%	0%	0%



This question was asked of those respondents who would be likely to move from their current home within the next five years to another home outside of the Adelaide city centre (9% of total respondents - caution small sample size).

Of those respondents likely to move from their current home within the next five years to another home outside of the Adelaide city centre, 30% indicated they would consider a home in the inner eastern suburbs and 20% within the inner northern suburbs. The Adelaide Hills was a popular choice for 20% of these respondents.

Question 30 - Taking into account your budget, to what extent would the following types of homes be attractive to you?

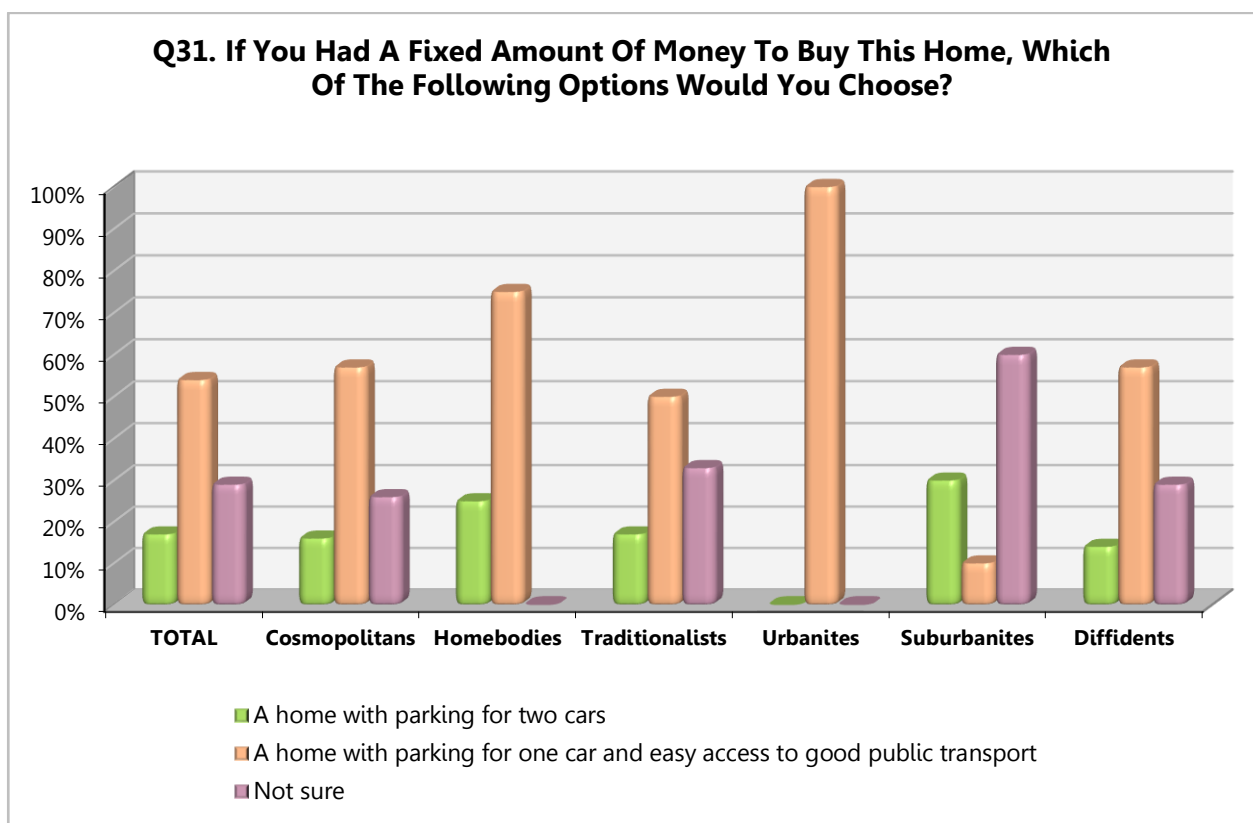
This question was asked of those respondents who would be likely to purchase a property in the next five years (16% of total respondents - caution small sample size).

Half of those respondents likely to purchase in the next five years indicated that they found a townhouse or terrace house and apartment in a 3 to 4 storey building to be the most attractive option (17% very attractive and 33% attractive each). The next most popular type of home was a detached home on a block of land with 44% of respondents finding that an attractive option (33% very attractive and 11% attractive).

(caution small sample size)	Very attractive	Attractive	Not sure	Not attractive
Townhouse or terrace house	17%	33%	6%	44%
Apartment in a 3 to 4 storey building	17%	33%	0%	50%
Detached home on a block of land	33%	11%	11%	44%
Apartment in a 5 to 8 storey building	17%	11%	0%	72%
Apartment in a 9 to 12 storey building	6%	6%	0%	89%
Apartment in a building of more than 12 storeys	6%	0%	0%	94%
Retirement unit	0%	6%	0%	94%
Other (specify)	6%	0%	6%	89%

Question 31 - For the following question, I would like you to imagine you are about to purchase a new home which could be anywhere. If you had a fixed amount of money to buy this home, which of the following options would you choose?

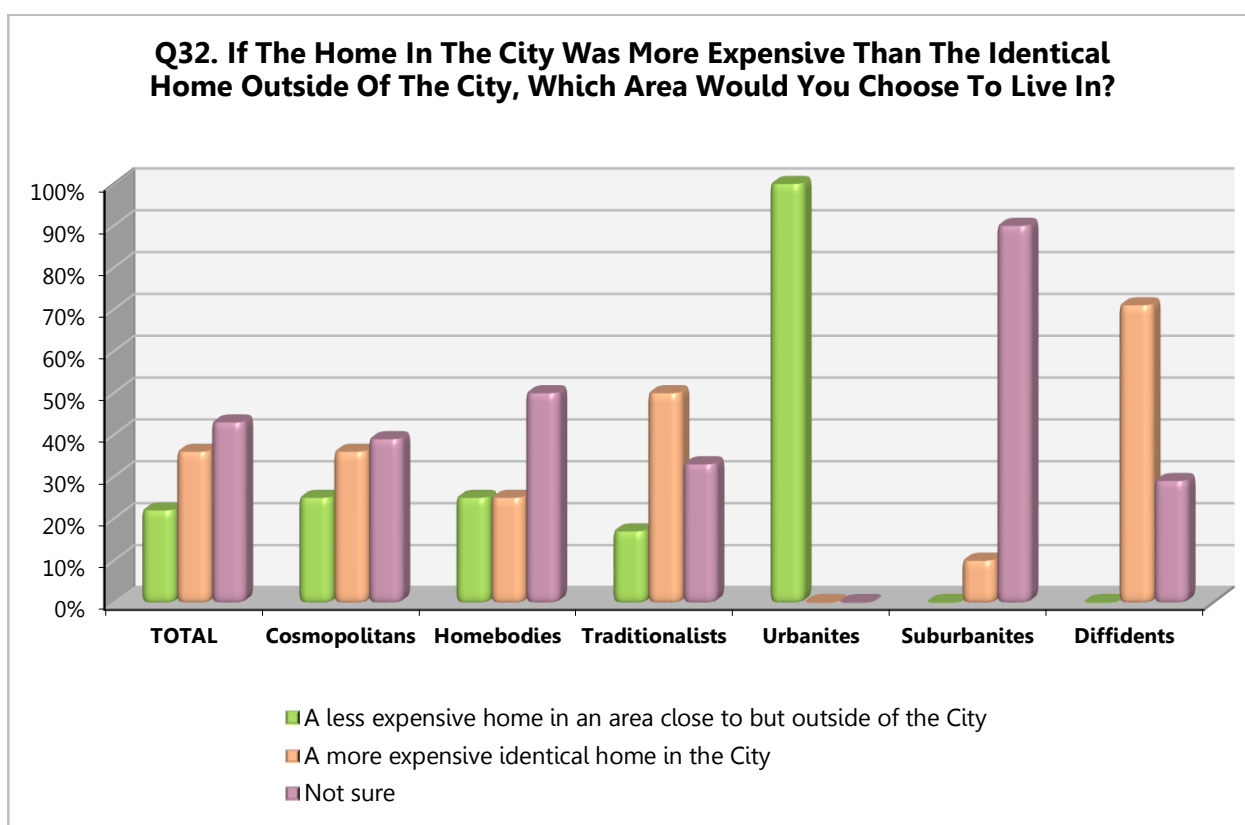
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
A home with parking for two cars	17%	16%	25%	17%	0%	30%	14%
A home with parking for one car and easy access to good public transport	54%	57%	75%	50%	100%	10%	57%
Not sure	29%	26%	0%	33%	0%	60%	29%



If respondents had a fixed amount of money to buy a home, over half of total respondents would choose a home with parking for one car and easy access to good public transport (54%), a further 17% would choose a home with parking for two cars with 29% not sure.

Question 32 - I would now like you to imagine you are about to purchase a new home which could either be in the City or an identical home in an area close to but outside of the City. If the home in the City was more expensive than the identical home outside of the City, which area would you choose to live in?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
A less expensive home in an area close to but outside of the City	22%	25%	25%	17%	100%	0%	0%
A more expensive identical home in the City	36%	36%	25%	50%	0%	10%	71%
Not sure	43%	39%	50%	33%	0%	90%	29%



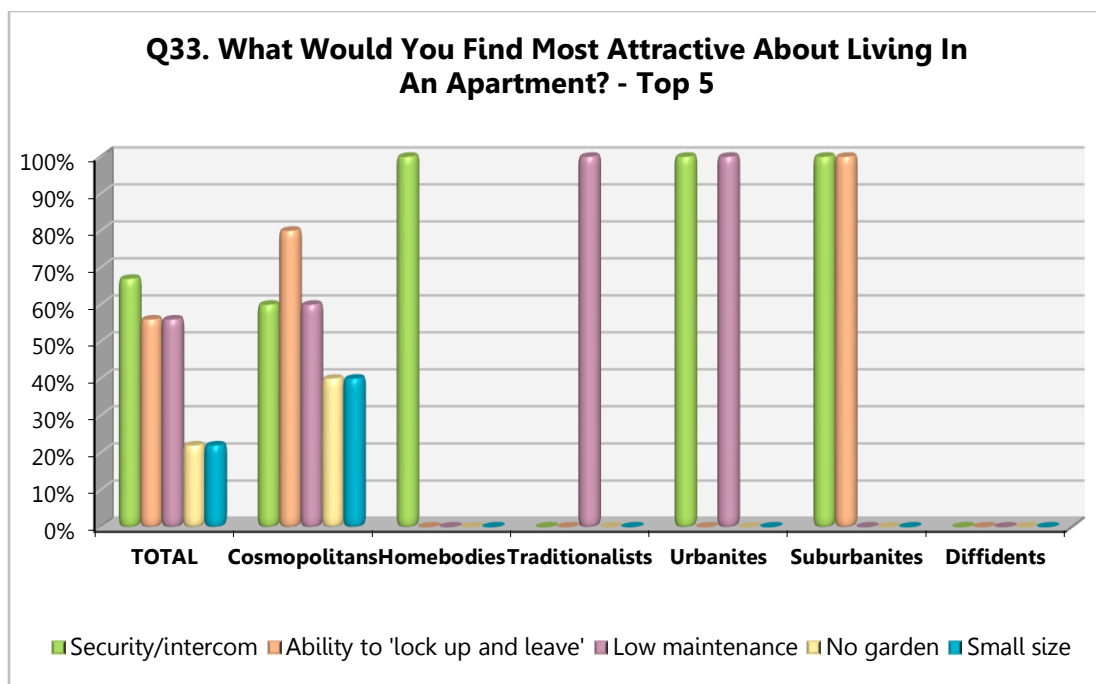
If respondents had a choice of a less expensive house in an area outside of the City or a more expensive identical home within the City, over a third of total respondents would choose a more expensive identical home within the City (36%) and a further 22% would choose a less expensive home in an area outside of the City with 43% being unsure which option they would choose.

4.14 Apartment Living Attitudes (Purchasers)

Q33 & Q34 are to be asked of respondents who answered either very attractive or attractive to apartment living in Q30 everyone else skip to Q35

Question 33 - What would you find most attractive about living in an apartment?

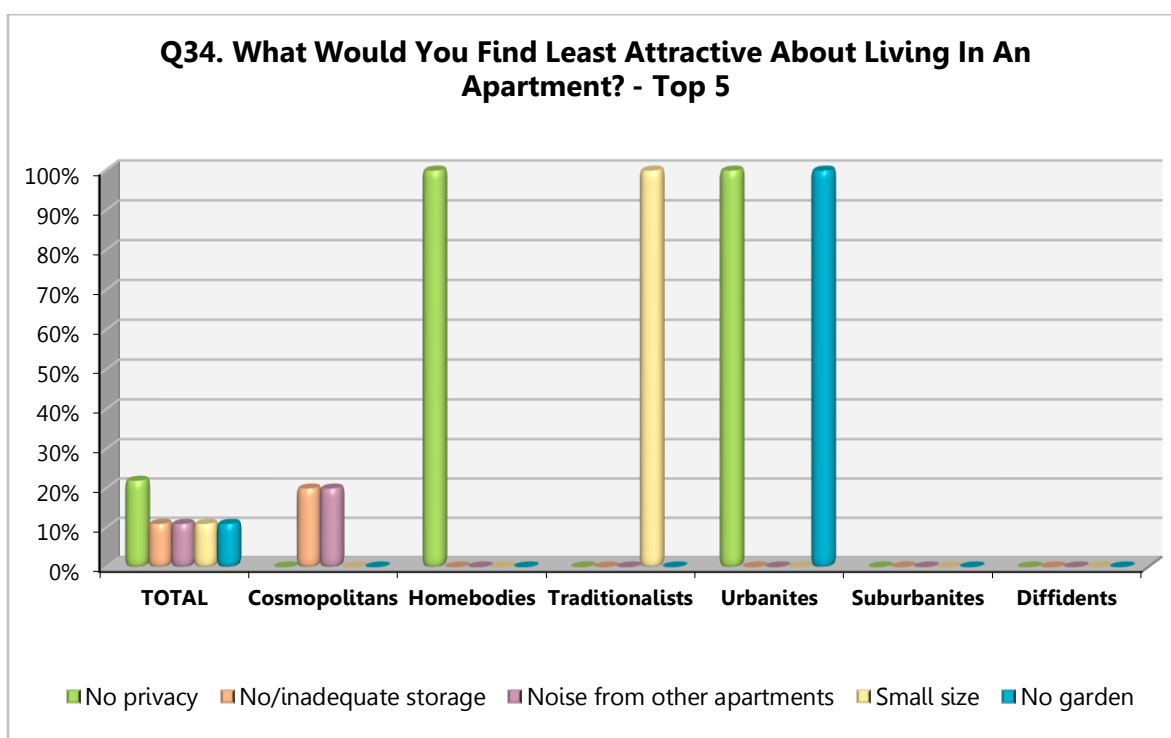
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size (caution small sample size)	9	5	1	1	1	1	0
Security/intercom	67%	60%	100%	0%	100%	100%	0%
Ability to 'lock up and leave'	56%	80%	0%	0%	0%	100%	0%
Low maintenance	56%	60%	0%	100%	100%	0%	0%
No garden	22%	40%	0%	0%	0%	0%	0%
Small size	22%	40%	0%	0%	0%	0%	0%
Common areas maintained by someone else	22%	20%	100%	0%	0%	0%	0%
Having a balcony	11%	20%	0%	0%	0%	0%	0%
Other	11%	20%	0%	0%	0%	0%	0%



This question was asked of those respondents who answered either very attractive or attractive to apartment living (8% of total respondents). Caution should be exercised in interpreting these findings due to the small sample size. Security or intercom for entry was the most attractive feature for 67% of these respondents, while the ability to lock up and leave, and low maintenance was attractive for 56% of these respondents. Lack of stairs was another attractive feature of apartment living.

Question 34 - And what would you find least attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	9	5	1	1	1	1	0
No privacy	22%	0%	100%	0%	100%	0%	0%
No/inadequate storage	11%	20%	0%	0%	0%	0%	0%
Noise from other apartments	11%	20%	0%	0%	0%	0%	0%
Small size	11%	0%	0%	100%	0%	0%	0%
No garden	11%	0%	0%	0%	100%	0%	0%
Other	22%	20%	0%	0%	100%	0%	0%
Nothing	33%	40%	0%	0%	0%	100%	0%



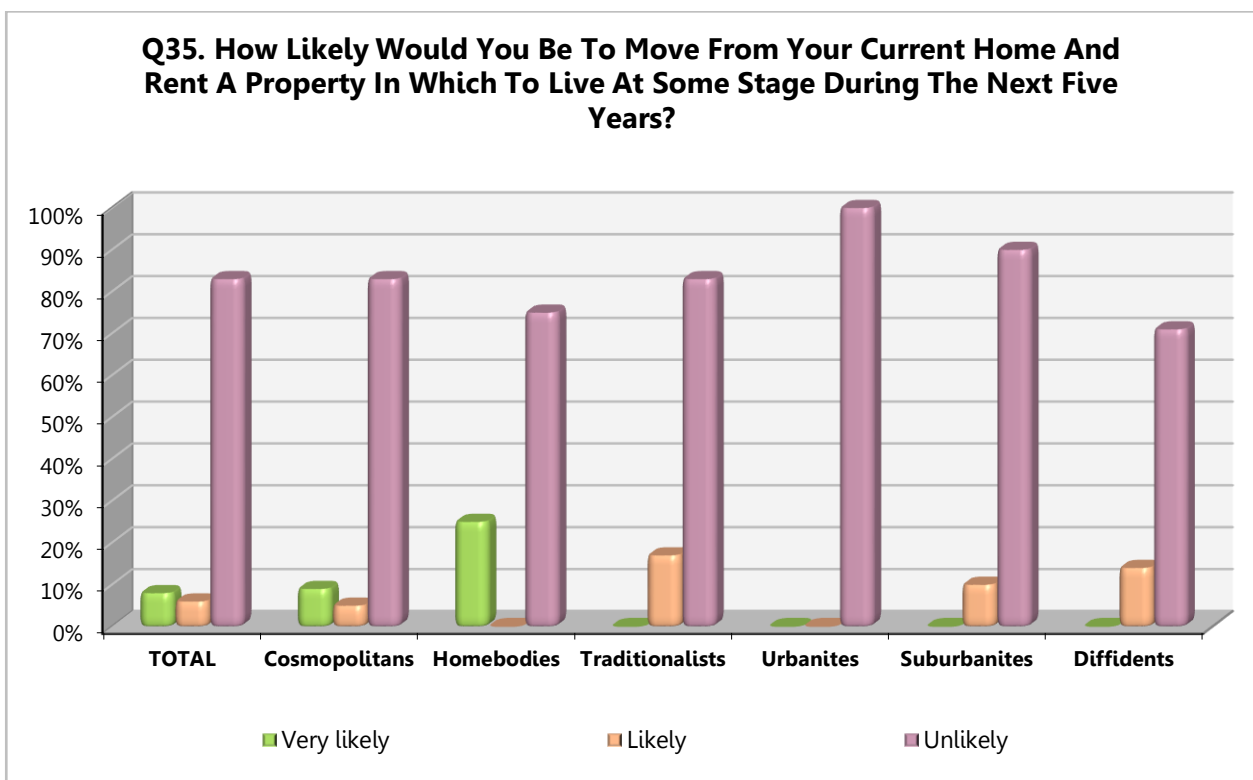
This question was asked of those respondents who answered either very attractive or attractive to apartment living (8% of total respondents). Caution should be exercised in interpreting these findings due to the small sample size).

No privacy was the least attractive feature for 22% of these respondents. No/inadequate storage, noise from other apartments, the small size of the apartments, and no garden were also nominated each as least attractive for 11% of respondents (note small sample size for this question). Other features considered least attractive by these respondents include lack of space, and development restrictions.

4.15 Renting – Intention, Budget and Features

Question 35 - How likely would you be to move from your current home and rent a property in which to live at some stage during the next five years?

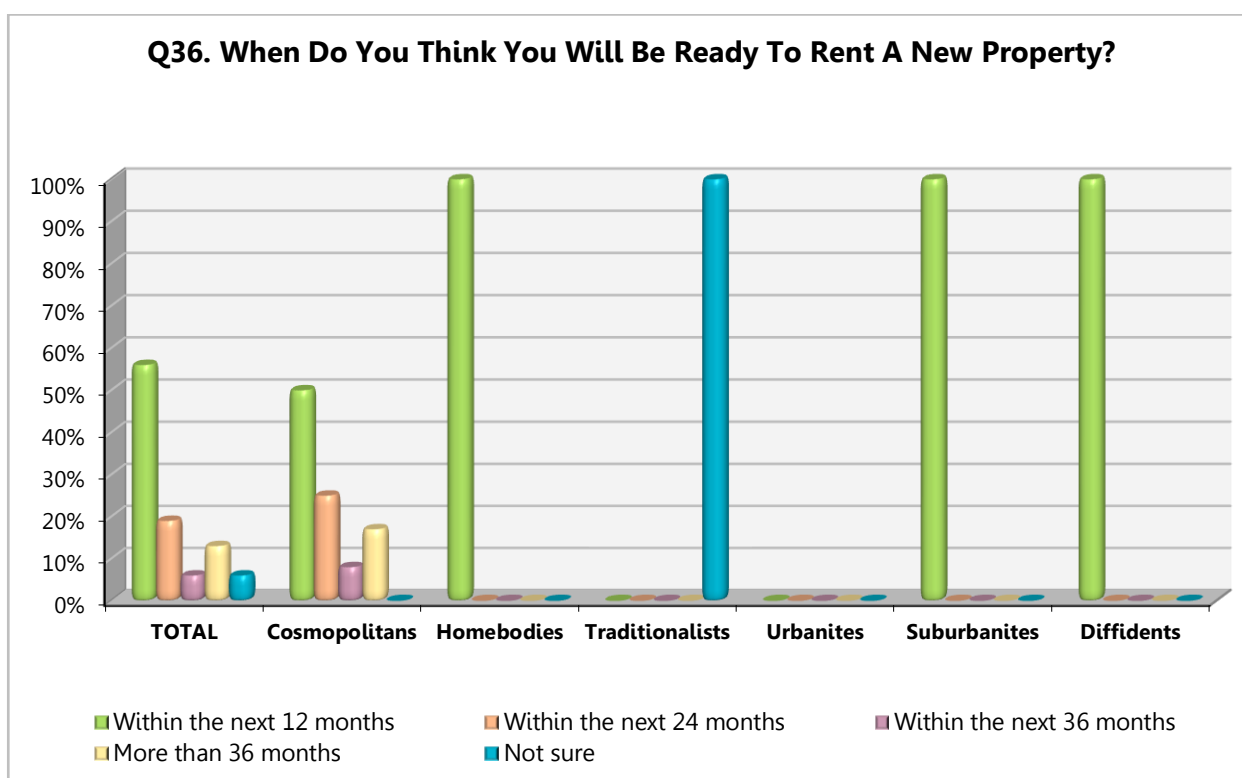
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Very likely	8%	9%	25%	0%	0%	0%	0%
Likely	6%	5%	0%	17%	0%	10%	14%
Unlikely	83%	83%	75%	83%	100%	90%	71%
Not sure	3%	3%	0%	0%	0%	0%	14%



A relatively small percentage of total respondents are likely to move from their current home and rent a property in the next five years (14%) with 83% of total respondents unlikely to move.

Question 36 - When do you think you will be ready to rent a new property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	16	12	1	1	0	1	1
Within the next 12 months	56%	50%	100%	0%	0%	100%	100%
Within the next 24 months	19%	25%	0%	0%	0%	0%	0%
Within the next 36 months	6%	8%	0%	0%	0%	0%	0%
More than 36 months	13%	17%	0%	0%	0%	0%	0%
Not sure	6%	0%	0%	100%	0%	0%	0%



This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (14% of total respondents - caution small sample size).

Of those respondents who indicated they would be likely to move from their current property and rent in the next five years, over half would be ready to rent in next twelve months (56%) and a further 19% ready within the next two years.

Question 37 - In which of the following areas do you plan to rent this property?

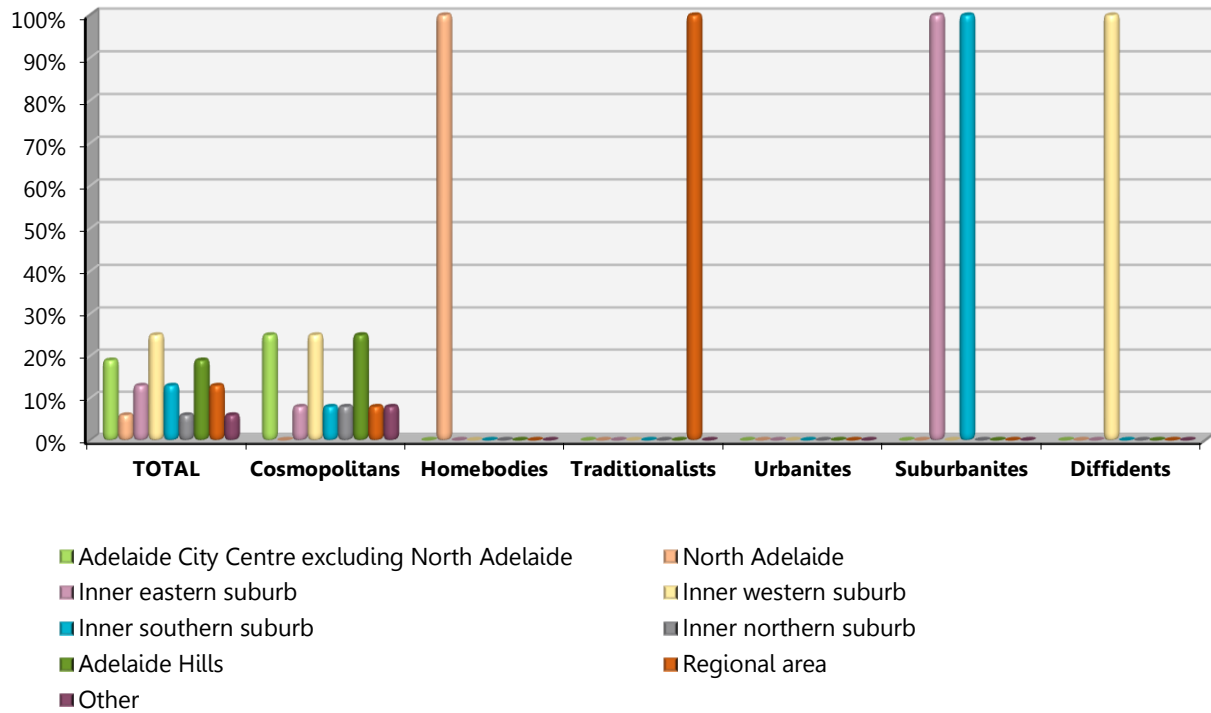
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size (caution small sample size)	16	12	1	1	0	1	1
Adelaide City Centre excluding North Adelaide	19%	25%	0%	0%	0%	0%	0%
North Adelaide	6%	0%	100%	0%	0%	0%	0%
Inner eastern suburb	13%	8%	0%	0%	0%	100%	0%
Inner western suburb	25%	25%	0%	0%	0%	0%	100%
Inner southern suburb	13%	8%	0%	0%	0%	100%	0%
Inner northern suburb	6%	8%	0%	0%	0%	0%	0%
Adelaide Hills	19%	25%	0%	0%	0%	0%	0%
Regional area	13%	8%	0%	100%	0%	0%	0%
Other	6%	8%	0%	0%	0%	0%	0%

This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (14% of total respondents - caution small sample size).

Of those respondents who indicated they would be likely to move from their current property and rent in the next five years, a quarter would plan to rent this property in either the Adelaide city centre (19%) or North Adelaide (6%). The inner Adelaide suburbs were also popular, with a quarter of these respondents choosing an inner western suburb, and 13% each choosing an inner eastern suburb or inner southern suburb.

Please refer to the chart on the following page.

Q37. In Which Of The Following Areas Do You Plan To Rent This Property?



IF ADELAIDE CITY CENTRE NOT ONE OF THE AREAS CONSIDERED:

Question 38 - I notice you didn't choose the Adelaide City Centre as one of the areas you would consider. What are your main reasons for this?

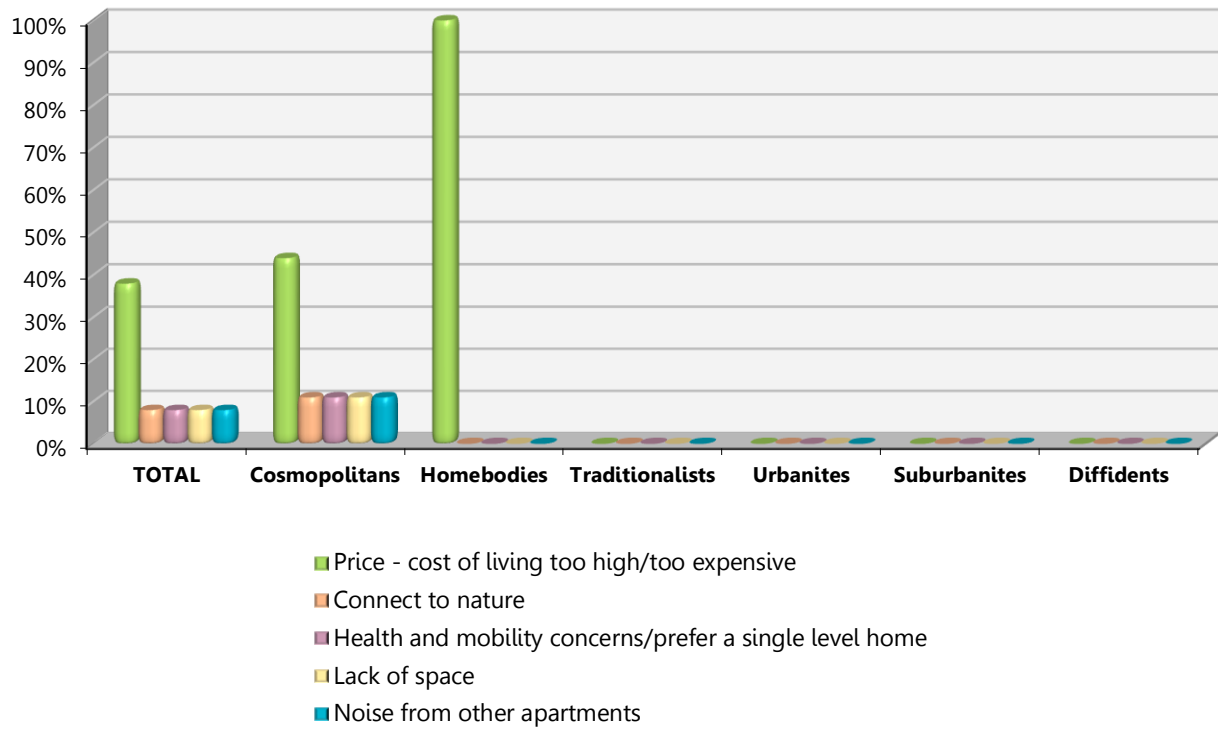
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size (caution small sample size)	13	9	1	1	0	1	1
Price - cost of living too high/too expensive	38%	44%	100%	0%	0%	0%	0%
Connect to nature	8%	11%	0%	0%	0%	0%	0%
Health and mobility concerns/prefer a single level home	8%	11%	0%	0%	0%	0%	0%
Lack of space	8%	11%	0%	0%	0%	0%	0%
Noise from other apartments	8%	11%	0%	0%	0%	0%	0%
Recommendation to live elsewhere	8%	11%	0%	0%	0%	0%	0%
Would prefer a house	8%	11%	0%	0%	0%	0%	0%
Work in the city	8%	11%	0%	0%	0%	0%	0%
Lack of car parking for visitors	8%	0%	0%	0%	0%	100%	0%
Would prefer to be close to the beach	8%	0%	0%	0%	0%	0%	100%
Don't know	8%	0%	0%	100%	0%	0%	0%

Those respondents who indicated they would be likely to rent a property in the next five years, but did not choose Adelaide as one of the areas they would consider to rent, were asked what their main reason was for not selecting the CBD (caution small sample size).

Of those respondents who indicated they would be likely to move from their current property and rent in the next five years, 38% indicated that their main reason for not choosing Adelaide as one of the areas they would consider to rent was the price and that the cost of living is too high/too expensive.

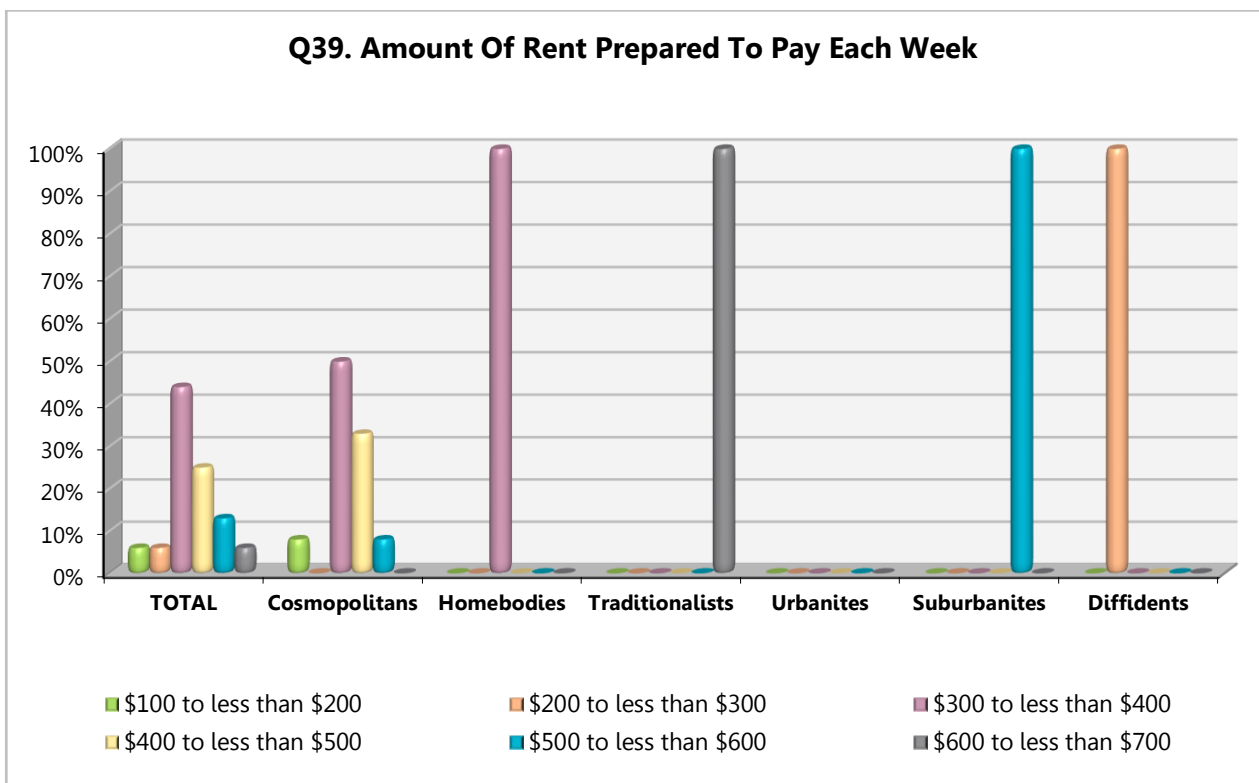
Please refer to the chart on the following page.

Q38. Main Reasons For Not Choosing The Adelaide City Centre As One Of The Areas You Would Consider - Top 5



Question 39 - Which of the following options would best match the amount of rent you would be prepared to pay each week for this property (interviewer to start at \$300)?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size (caution small sample size)	16	12	1	1	0	1	1
\$100 to less than \$200	6%	8%	0%	0%	0%	0%	0%
\$200 to less than \$300	6%	0%	0%	0%	0%	0%	100%
\$300 to less than \$400	44%	50%	100%	0%	0%	0%	0%
\$400 to less than \$500	25%	33%	0%	0%	0%	0%	0%
\$500 to less than \$600	13%	8%	0%	0%	0%	100%	0%
\$600 to less than \$700	6%	0%	0%	100%	0%	0%	0%



This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (14% of total respondents - caution small sample size).

Over two-thirds of those respondents likely to rent in the next five years stated their budget to rent a home would be in the \$300 to \$500 per week price range (69%).

Question 40 - And what advantages would this rental property have?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	16	12	1	1	0	1	1
A smaller home that's easier to maintain	25%	33%	0%	0%	0%	0%	0%
A larger home with more room	19%	25%	0%	0%	0%	0%	0%
A better suburb	13%	8%	0%	0%	0%	0%	100%
Closer to friends or family	13%	0%	100%	0%	0%	100%	0%
Cheaper rent	6%	8%	0%	0%	0%	0%	0%
Other	44%	42%	0%	100%	0%	0%	100%

This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (16% of total respondents - caution small sample size).

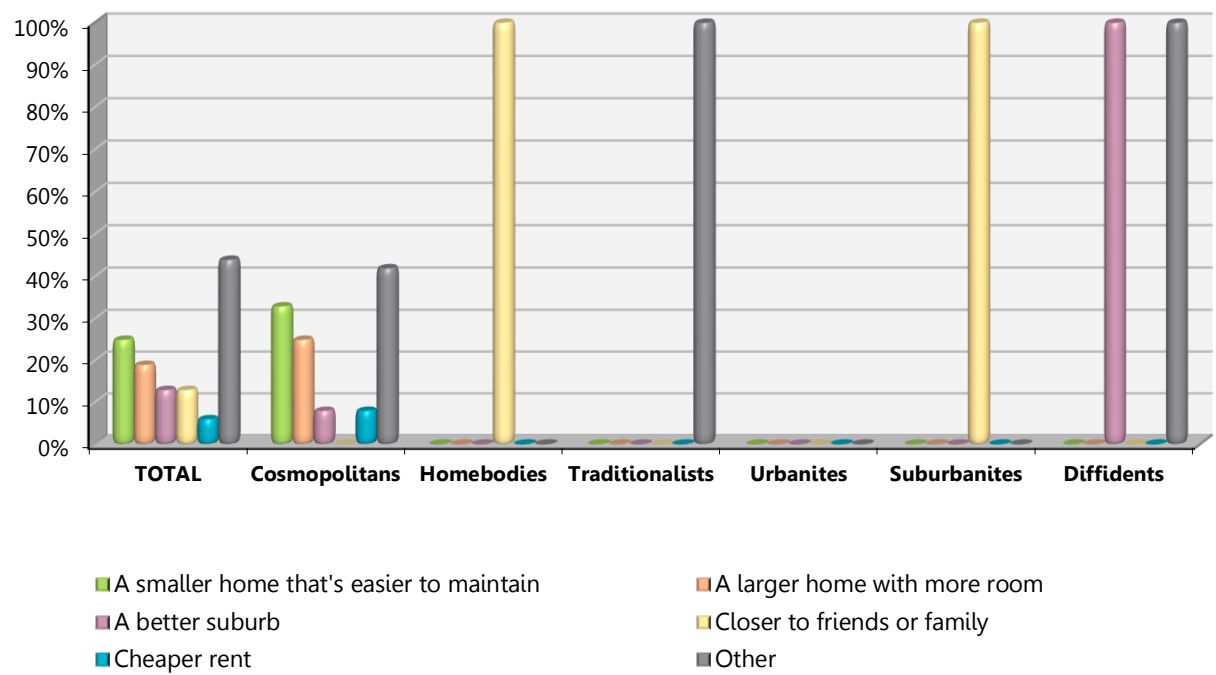
‘A smaller home that’s easier to maintain’ was the most frequently nominated advantage for renting (25%) while a further 19% of respondents would move for a larger home with more room.

Other advantages of renting nominated by respondents include:

- Close to university
- Connection with nature
- Plan to move interstate or overseas
- Self-sufficient energy
- Transportation and more space in the apartment
- We would move to the beach

Please refer to the chart on the following page.

Q40. What Advantages Would This Rental Property Have?



Question 41 - Taking into account your budget, to what extent would the following types of homes be attractive for you to rent (interviewer to read out list of options)?

This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (14% of total respondents caution small sample size).

Three-quarters of those respondents likely to move from their current property and rent in the next five years indicated that they found a townhouse or terrace house to be the most attractive option (31% very attractive and 44% attractive). The next most popular type of home was a detached home on a block of land with 56% of respondents finding that an attractive option (25% very attractive and 31% attractive). Apartment living was a less attractive option for renting, with 19% of these respondents claiming an apartment in a 3 to 4 building would be attractive, and 12% an apartment in a 5 to 8 storey building.

	Very attractive	Attractive	Not sure	Not attractive
Townhouse or terrace house	31%	44%	0%	25%
Detached home on a block of land	25%	31%	13%	31%
Apartment in a 3 to 4 storey building	6%	13%	19%	63%
Apartment in a 5 to 8 storey building	6%	6%	13%	75%
Apartment in a 9 to 12 storey building	0%	0%	13%	88%
Apartment in a building of more than 12 storeys	0%	0%	6%	94%
Retirement unit	0%	0%	0%	100%
Other (specify)	0%	6%	13%	81%

Question 42 - In the following questions I would like to ask you about some of the features you might like in your rental property?

Respondents were asked which of the following features they would like incorporated into the design of a rental property they were considering to rent as their next home (caution small sample size):

- How many bedrooms?
- How many bathrooms?
- How many living areas?
- How many car spaces?
- Would you like an outdoor entertainment area?

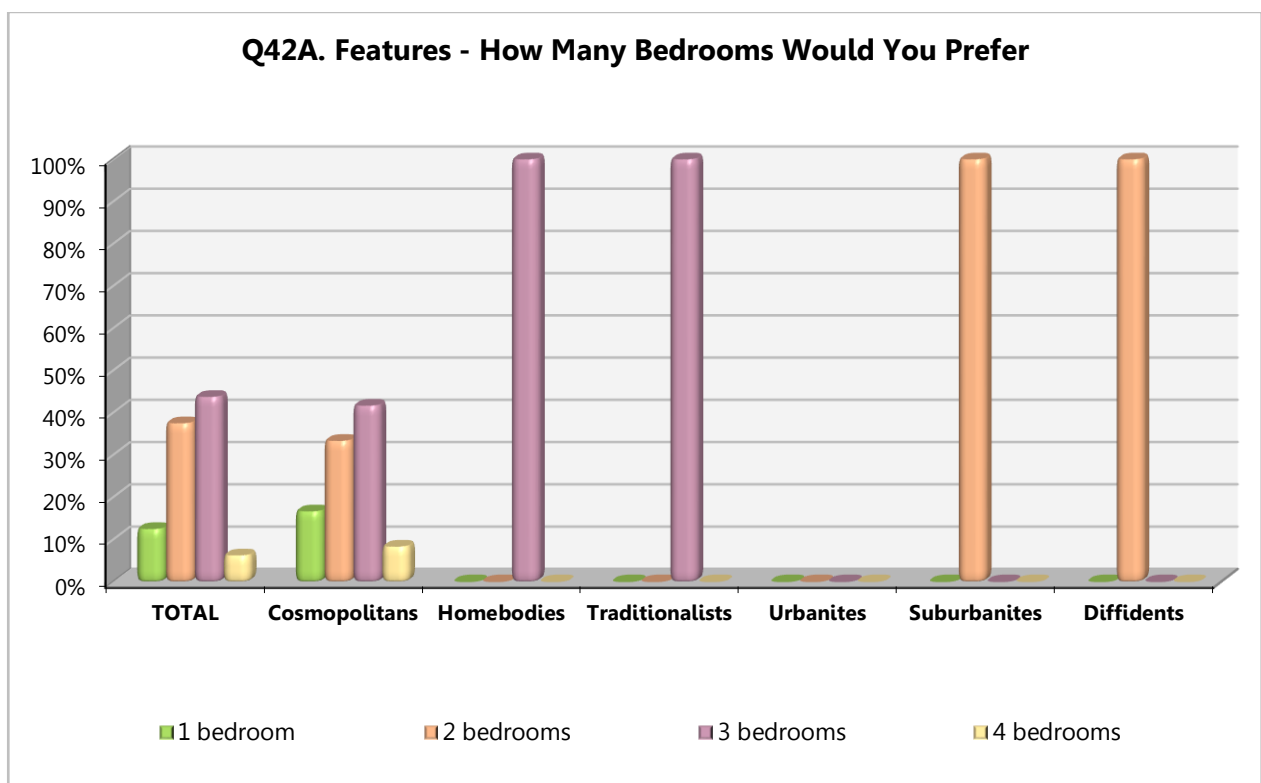
Key points to note regarding design features to be incorporated into a rental property are as follows:

- Nearly half of those respondents who would be likely to rent a property in the next five years would prefer three bedrooms (44%) while 38% of these respondents prefer two bedrooms
- Nearly two-thirds of respondents would prefer two bathrooms (63%)
- Respondents were split on their preference for number of living areas with half preferring one living space (50%)
- Over half of respondents would prefer two car spaces (56%)
- An outdoor entertainment area was favoured by nearly all of these respondents (88%)

A more detailed analysis for each feature is provided on the following pages.

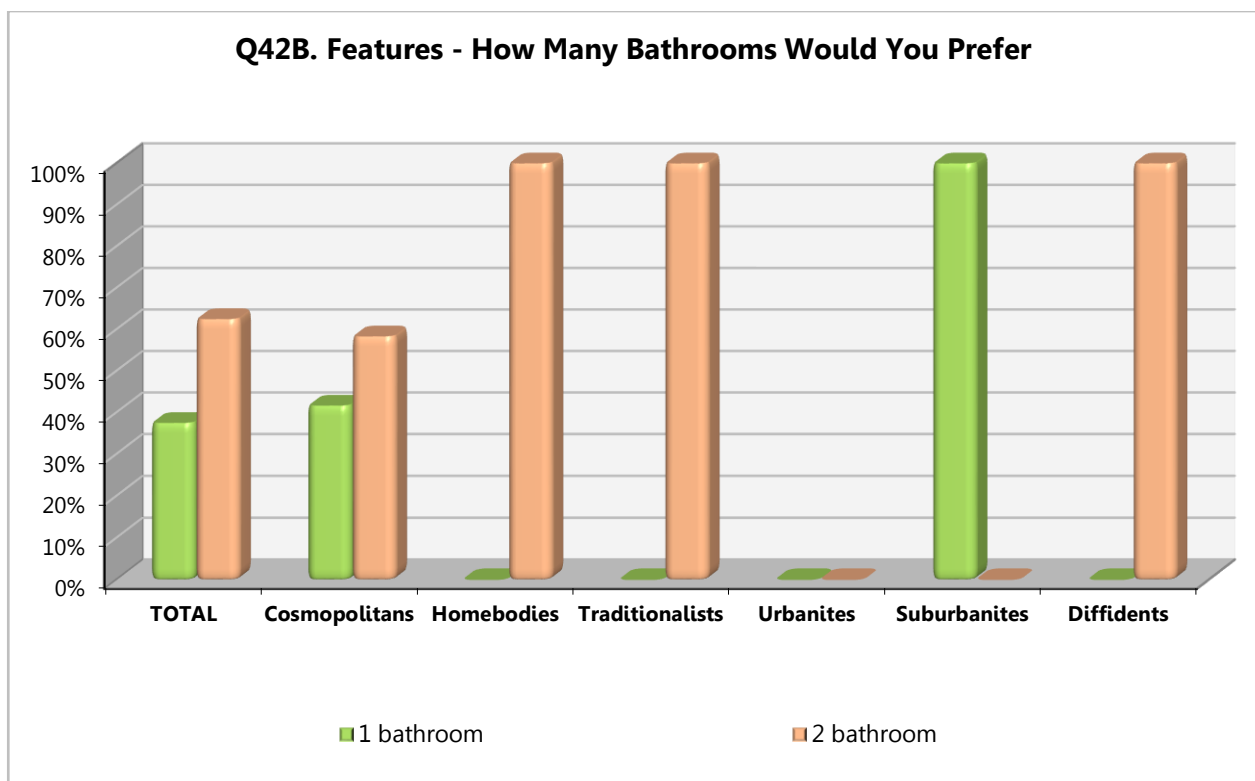
Question 42a – How many bedrooms would you prefer in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	16	12	1	1	0	1	1
1 bedroom	13%	17%	0%	0%	0%	0%	0%
2 bedrooms	38%	33%	0%	0%	0%	100%	100%
3 bedrooms	44%	42%	100%	100%	0%	0%	0%
4 bedrooms	6%	8%	0%	0%	0%	0%	0%



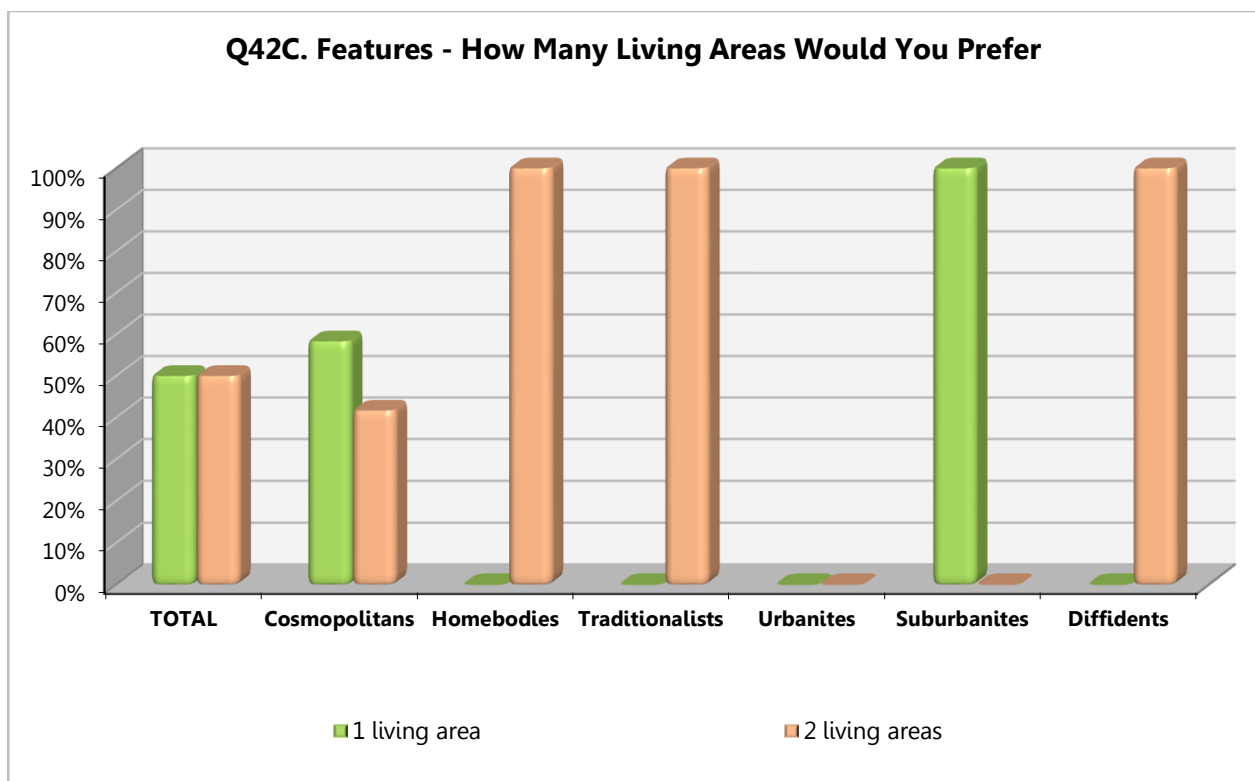
Question 42b – How many bathrooms would you prefer in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	16	12	1	1	0	1	1
1 bathroom	38%	42%	0%	0%	0%	100%	0%
2 bathroom	63%	58%	100%	100%	0%	0%	100%



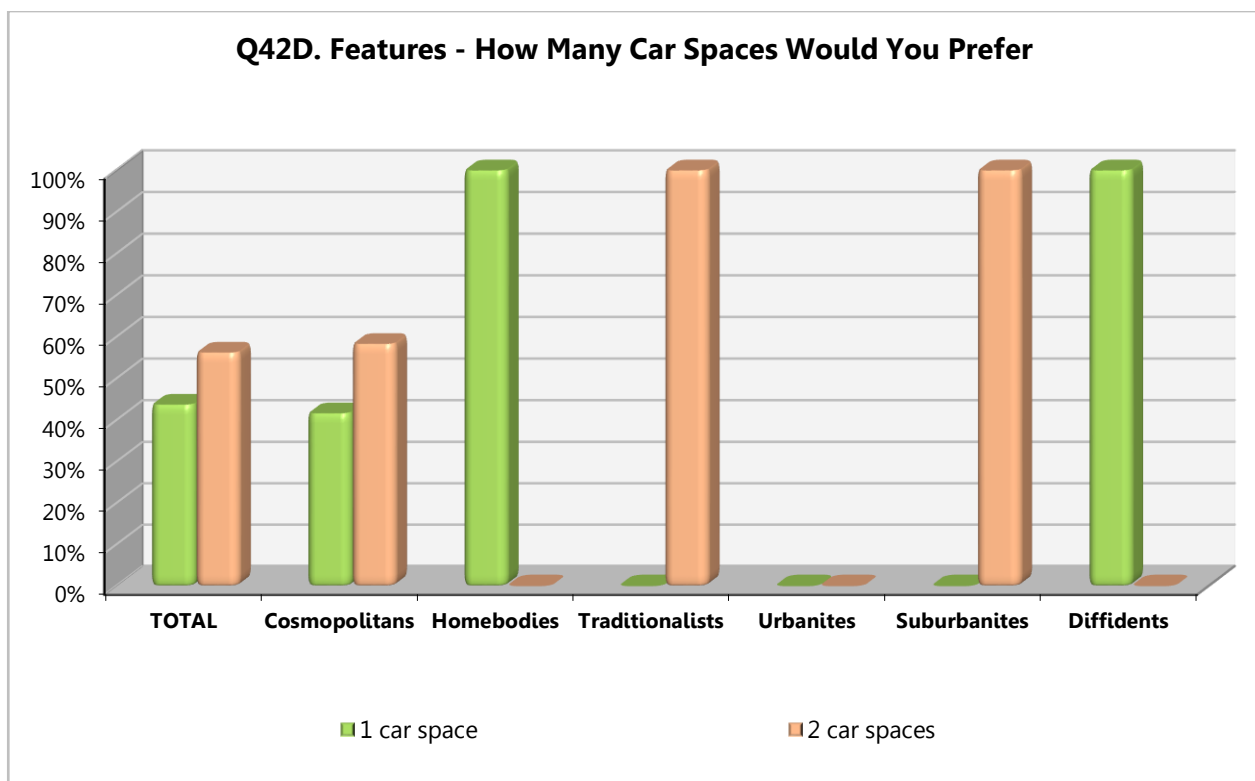
Question 42c – How many living areas would you prefer in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	16	12	1	1	0	1	1
1 living area	50%	58%	0%	0%	0%	100%	0%
2 living areas	50%	42%	100%	100%	0%	0%	100%



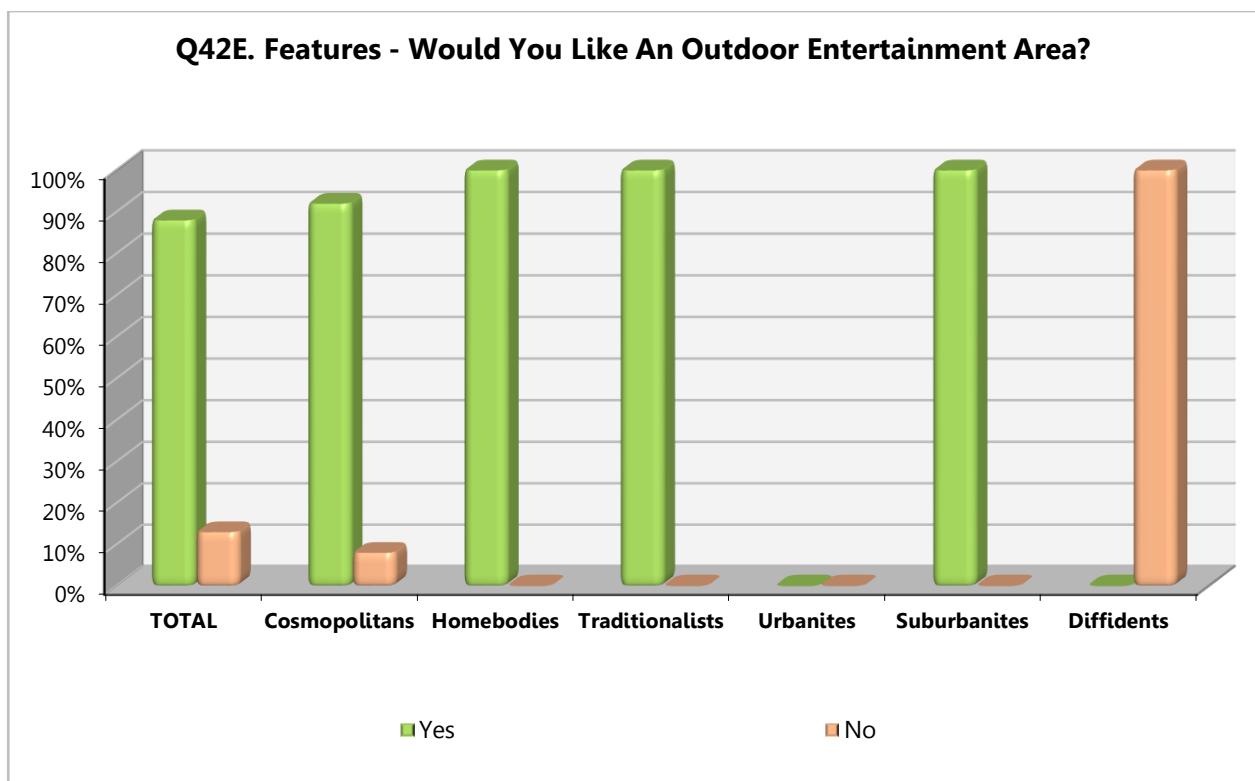
Question 42d – How many car spaces would you prefer in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	16	12	1	1	0	1	1
1 car space	44%	42%	100%	0%	0%	0%	100%
2 car spaces	56%	58%	0%	100%	0%	100%	0%



Question 42e – Would you like an outdoor entertainment area in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	16	12	1	1	0	1	1
Yes	88%	92%	100%	100%	0%	100%	0%
No	13%	8%	0%	0%	0%	0%	100%

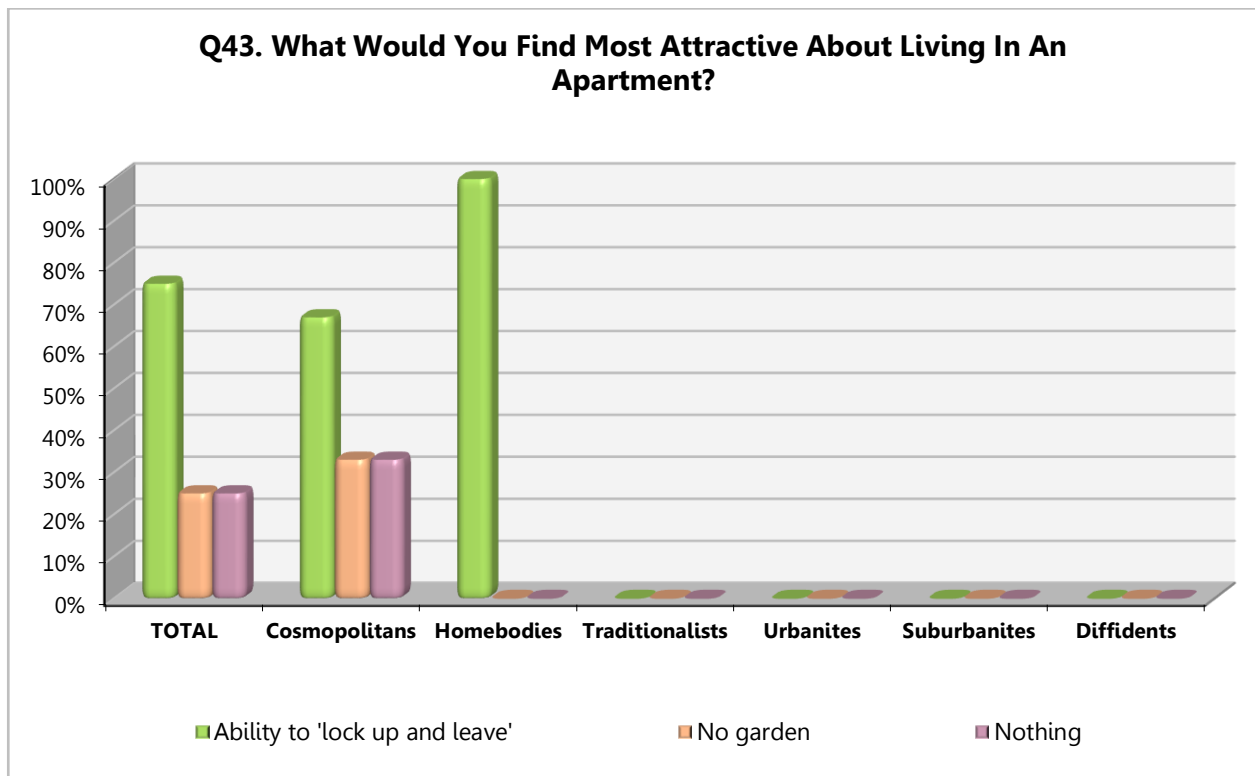


4.16 Apartment Living Attitudes

Q43 & Q44 are to be asked of respondents who answered either very attractive or attractive to apartment living in Q41 everyone else skip to Q45

Question 43 - What would you find most attractive about living in an apartment?

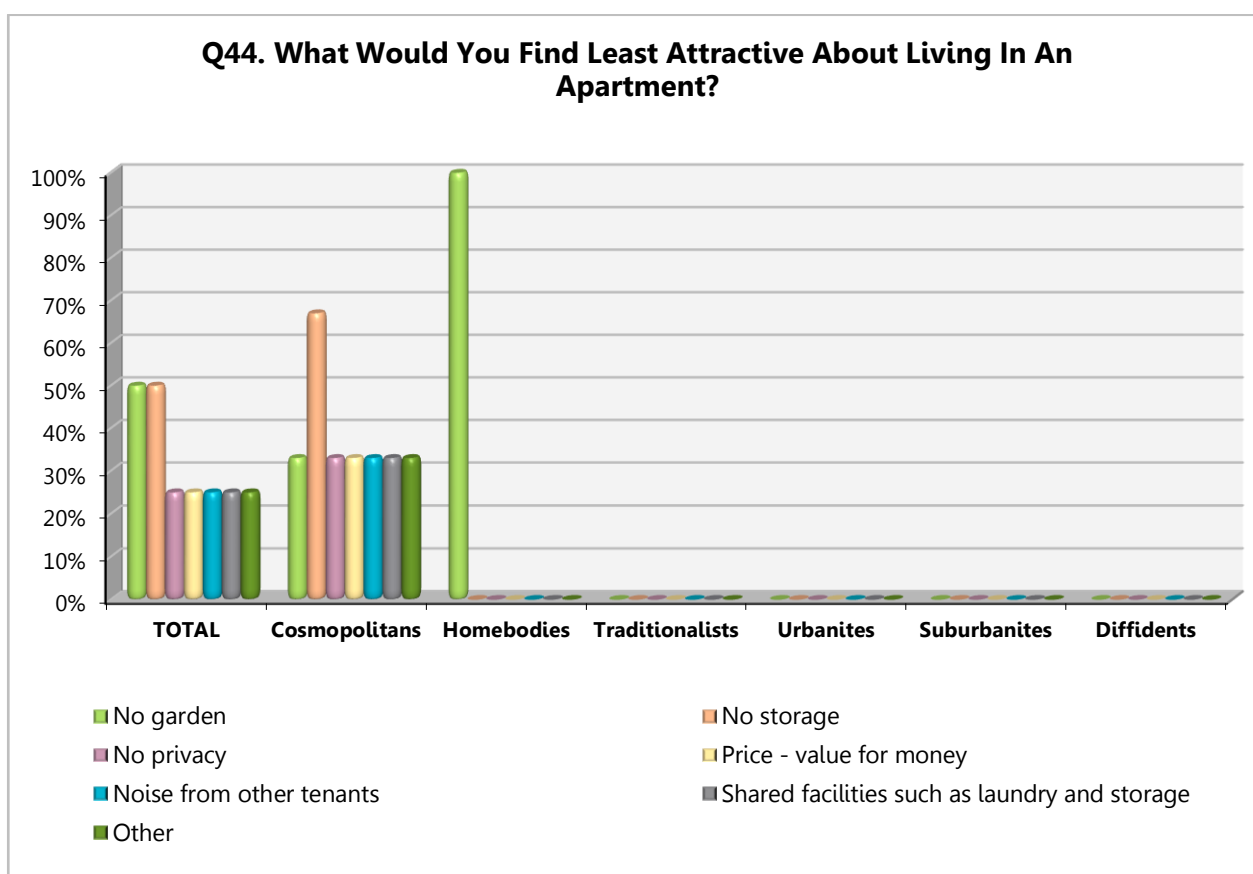
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	4	3	1	0	0	0	0
Ability to 'lock up and leave'	75%	67%	100%	0%	0%	0%	0%
No garden	25%	33%	0%	0%	0%	0%	0%
Nothing	25%	33%	0%	0%	0%	0%	0%



This question was asked of those respondents who answered either very attractive or attractive to rent an apartment (3% of total respondents - caution small sample size). The ability to lock up and leave is the most attractive feature for 75% of these respondents (note the small sample size for this question).

Question 44 - And what would you find least attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	4	3	1	0	0	0	0
No garden	50%	33%	100%	0%	0%	0%	0%
No storage	50%	67%	0%	0%	0%	0%	0%
No privacy	25%	33%	0%	0%	0%	0%	0%
Price - value for money	25%	33%	0%	0%	0%	0%	0%
Noise from other tenants	25%	33%	0%	0%	0%	0%	0%
Shared facilities such as laundry and storage	25%	33%	0%	0%	0%	0%	0%
Other	25%	33%	0%	0%	0%	0%	0%



This question was asked of those respondents who answered either very attractive or attractive to rent an apartment (4% of total respondents - caution small sample size). When asked what they would find least attractive about living in an apartment 'No garden' and 'No storage' were the least attractive features for of these respondents (50% each). Another feature nominated was the different rules regarding the sizes of the properties.

4.17 Information Sources – Residential Areas

Question 45 - Please imagine you were seeking information on an area in which to live. Which of the following information sources would you use?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Realestate.com.au	55%	49%	100%	67%	100%	70%	57%
General search on the Internet	43%	45%	25%	33%	0%	40%	43%
Local real estate agent	27%	20%	50%	83%	100%	50%	14%
The Advertiser	24%	25%	25%	33%	0%	30%	0%
Talk to family or friends	22%	20%	25%	50%	0%	30%	14%
The Sunday Mail	20%	18%	25%	50%	0%	30%	0%
Drop into a display village	14%	11%	25%	33%	100%	20%	0%
Local paper such as the Messenger	10%	8%	25%	33%	0%	20%	0%
Visit a builders' website	10%	8%	25%	33%	0%	10%	0%
Other	9%	9%	0%	0%	0%	0%	29%
Not sure	3%	3%	0%	0%	0%	0%	0%

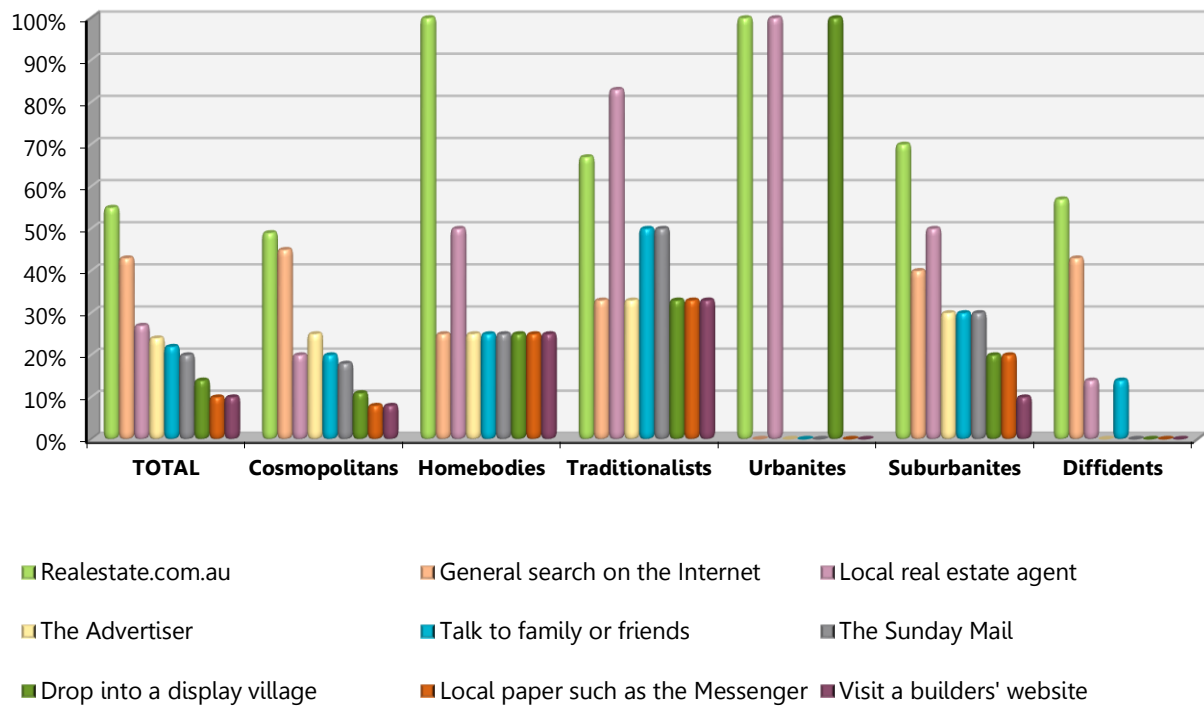
Over half of total respondents indicated they would research areas in which to live by visiting the realestate.com.au website (55%) followed by a general search on the Internet (43%) and then talking to a local real estate agent (27%).

‘Other’ responses nominated by respondents include:

- Own knowledge (x3)
- domain.com.au
- Gumtree
- I know the area so don't look in papers etc.
- I would drive around the areas and look for myself
- Learn about the history of the area
- Looking around myself
- Walked by and saw it

Please refer to the chart on the following page.

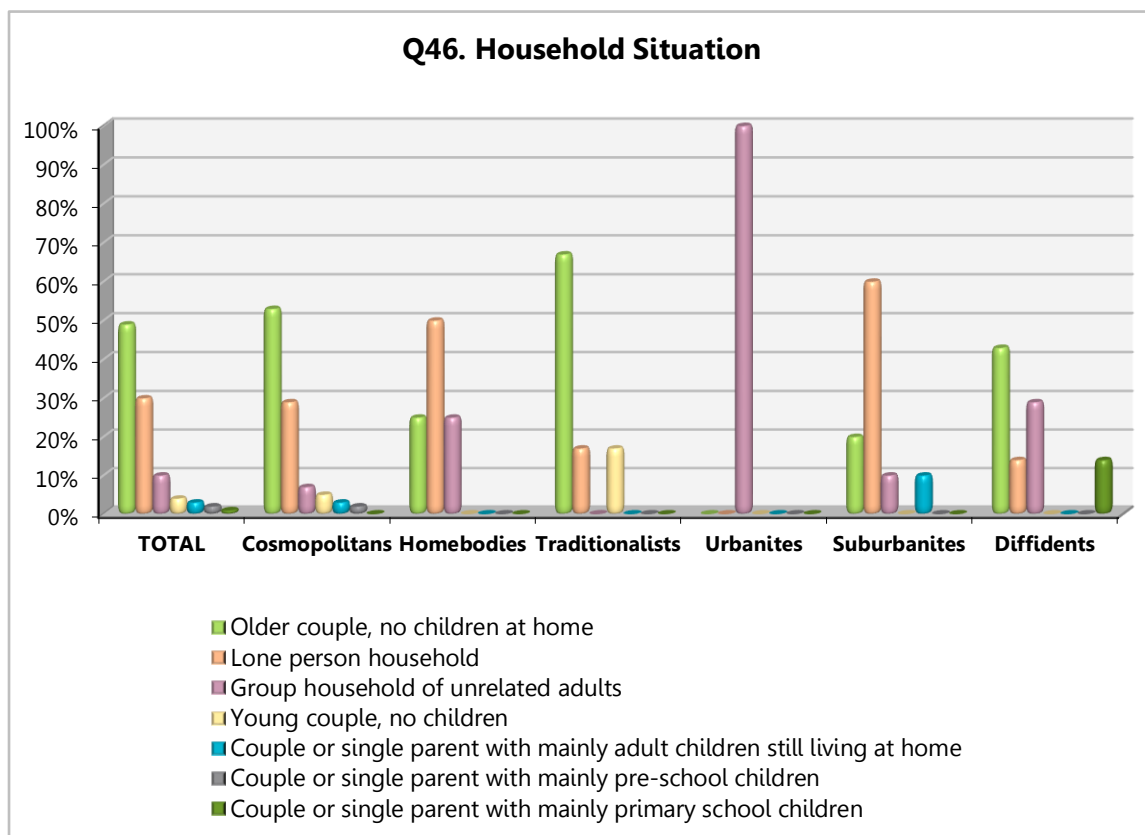
Q45. Which Of The Following Information Sources Would You Use?



4.18 Household Type, Occupation and Income

Question 46 - Which of the following categories best describes your household situation?

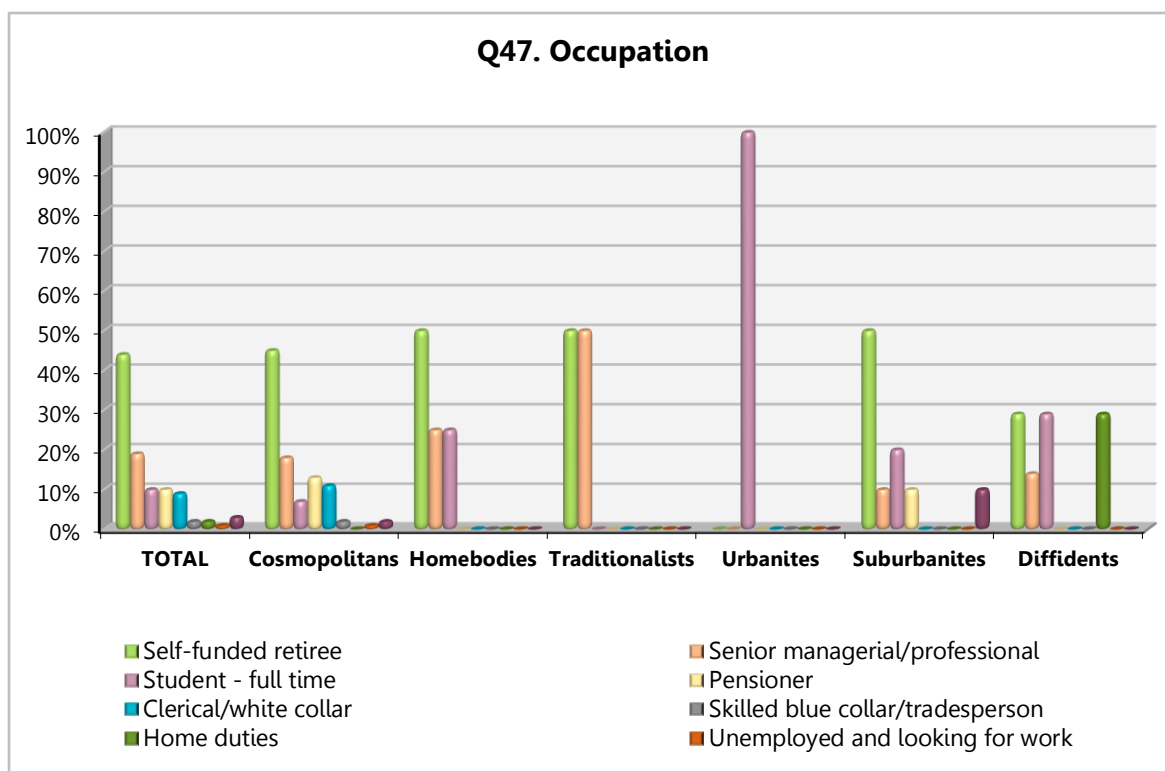
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	115	87	4	6	1	10	7
Older couple, no children at home	49%	53%	25%	67%	0%	20%	43%
Lone person household	30%	29%	50%	17%	0%	60%	14%
Group household of unrelated adults	10%	7%	25%	0%	100%	10%	29%
Young couple, no children	4%	5%	0%	17%	0%	0%	0%
Couple or single parent with mainly adult children still living at home	3%	3%	0%	0%	0%	10%	0%
Couple or single parent with mainly pre-school children	2%	2%	0%	0%	0%	0%	0%
Couple or single parent with mainly primary school children	1%	0%	0%	0%	0%	0%	14%
Couple or single parent with mainly teenage children	1%	1%	0%	0%	0%	0%	0%



Nearly half of total respondents (49%) are older couples with no children living at home, with a further 30% living in lone person households.

Question 47 - Which of the following best describes your occupation?

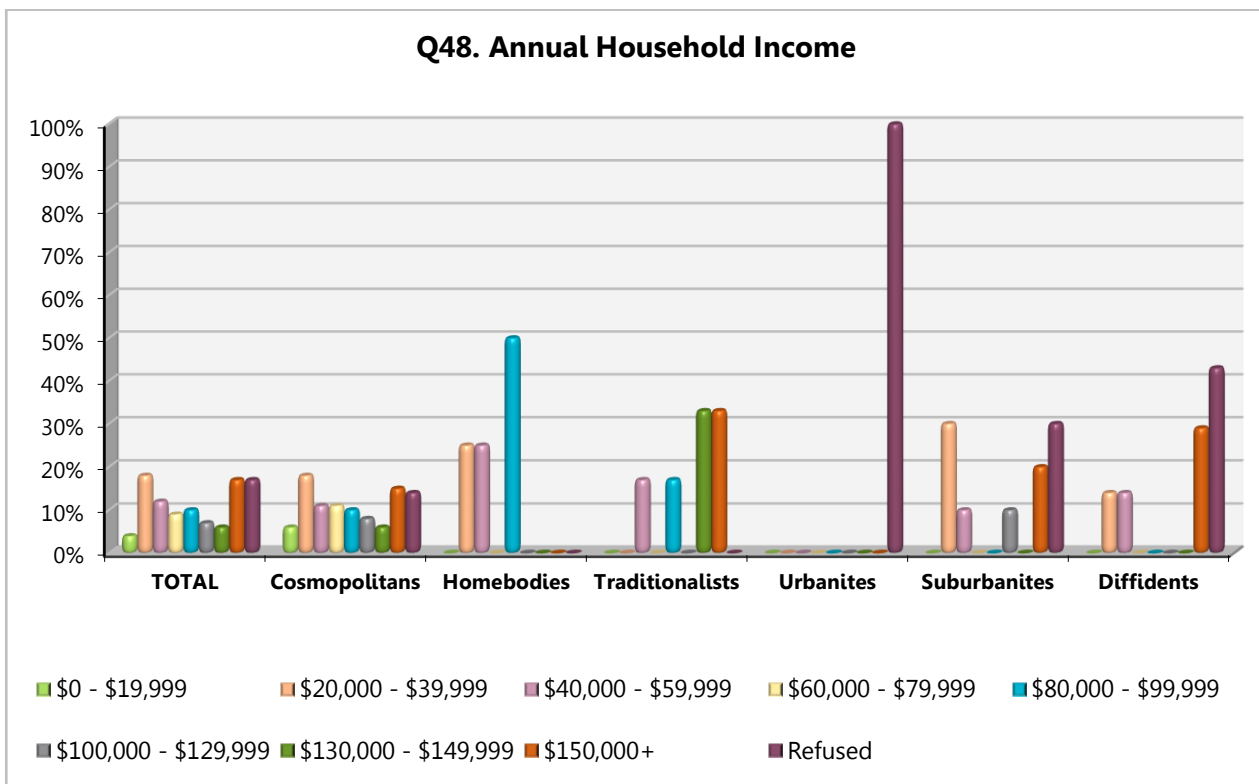
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	115	87	4	6	1	10	7
Self-funded retiree	44%	45%	50%	50%	0%	50%	29%
Senior managerial/professional	19%	18%	25%	50%	0%	10%	14%
Student - full time	10%	7%	25%	0%	100%	20%	29%
Pensioner	10%	13%	0%	0%	0%	10%	0%
Clerical/white collar	9%	11%	0%	0%	0%	0%	0%
Skilled blue collar/tradesperson	2%	2%	0%	0%	0%	0%	0%
Home duties	2%	0%	0%	0%	0%	0%	29%
Unemployed and looking for work	1%	1%	0%	0%	0%	0%	0%
Other	3%	2%	0%	0%	0%	10%	0%



Nearly half of total respondents claim to be self-funded retirees (44%) and a further 10% pensioners, reflecting the age profile and household situation of total respondents. White collar occupations represent a further 28% of total respondents, with 19% employed within senior managerial/professional roles and 9% within clerical/white collar professions.

Question 48 - Which of the following best describes your total annual household income before tax?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
\$0 - \$19,999	4%	6%	0%	0%	0%	0%	0%
\$20,000 - \$39,999	18%	18%	25%	0%	0%	30%	14%
\$40,000 - \$59,999	12%	11%	25%	17%	0%	10%	14%
\$60,000 - \$79,999	9%	11%	0%	0%	0%	0%	0%
\$80,000 - \$99,999	10%	10%	50%	17%	0%	0%	0%
\$100,000 - \$129,999	7%	8%	0%	0%	0%	10%	0%
\$130,000 - \$149,999	6%	6%	0%	33%	0%	0%	0%
\$150,000+	17%	15%	0%	33%	0%	20%	29%
Refused	17%	14%	0%	0%	100%	30%	43%

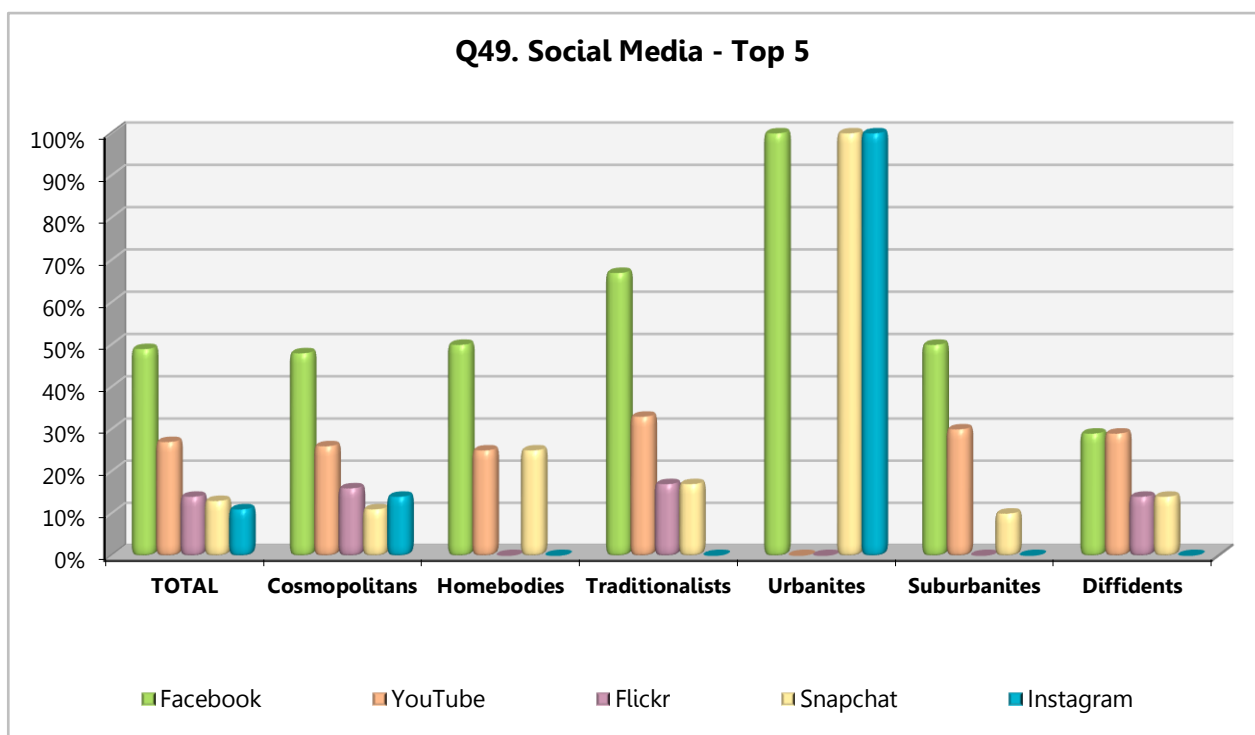


Nearly a third of total respondents (32%) have a total annual household income before tax of between \$60,000 and \$150,000, with a further 17% of respondents with a total annual household income before tax of more than \$150,000.

4.19 Social Media Use

Question 49 - Which of the following social media sites do you use at least once a week?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	115	87	4	6	1	10	7
Facebook	49%	48%	50%	67%	100%	50%	29%
YouTube	27%	26%	25%	33%	0%	30%	29%
Flickr	14%	16%	0%	17%	0%	0%	14%
Snapchat	13%	11%	25%	17%	100%	10%	14%
Instagram	11%	14%	0%	0%	100%	0%	0%
Blogspot	10%	13%	25%	0%	0%	0%	0%
Pinterest	10%	8%	25%	17%	100%	10%	14%
Tumblr	3%	3%	0%	17%	0%	0%	0%
LinkedIn	3%	5%	0%	0%	0%	0%	0%
Twitter	2%	1%	0%	0%	100%	0%	0%
Chat rooms or forums	1%	1%	0%	0%	0%	0%	0%
Other	2%	2%	0%	0%	0%	0%	0%



Nearly half of total respondents indicated they use Facebook at least once a week (49%) and a further 27% of all respondents use YouTube at least once a week. Google was also suggested by respondents.

APPENDIX 1: SURVEY QUESTIONNAIRE

THIS QUESTIONNAIRE IS TO BE USED FOR THE FOLLOWING:

Recent Adelaide purchasers & renters – telephone survey n=100 (adults >=18)

POSTCODE MUST BE 5000

Question Code - S = single response, M = multiple response, P = prompted response and U = unprompted response.

Our company, Hudson Howells, has been engaged to undertake market research on residential living. This research is being undertaken by your client to better understand what people are looking for in a new home and where they might prefer to live.

We value your opinions and please remember it is your views we are interested in. Your comments will be treated confidentially.

1. Can I please confirm the suburb and postcode you currently live in, whether you are an owner occupier or renter and postcode you currently work or study in (MAIN RESIDENCE & WORK/STUDY PLACE)? SU

Postcode of primary residence (confirm within study area) must be 5000 as owner occupier or renter	1
Primary work or study place postcode:	2
Owner occupier	3
Renter including shared/free accommodation	4
Refused – THANK AND TERMINATE INTERVIEW EX SAMPLE	5

2. And what was the postcode of your previous address (MAIN RESIDENCE)? SU

Previous primary residence postcode:	1
--------------------------------------	---

3. Gender [DO NOT ASK]

Male	1
Female	2

4. Which of the following age categories are you in? SP

18 to 20	1
21 to 24	2
25 to 29	3
30 to 34	4
35 to 39	5
40 to 44	6
45 to 49	7
50 to 59	8
60 to 64	9
65 to 69	10
70 to 74	11
75 or over	12
Refused	13

5. What do you most like about where you currently live? MU

<i>Most liked</i>
My home
Leafy streets
Close to friends
Close to parks
Close to family
Good neighbours / neighbourhood
Convenient for shopping
Convenient for schools / kindergarten / childcare for my children
Close to work
It is a safe and secure place to live / a place where I feel safe
This is the area I grew up in
Close to entertainment and recreation facilities
Surrounded by attractive homes
Good public transport
Close to medical facilities
Close to restaurants or cafes
Open space (public)
Open space (private outdoor area)
Trees
Peace and quiet (tranquillity)
Close to where I study
Vibrant urban lifestyle
Don't know
Other <i>[specify]</i>

6. What do you least like about where you currently live? MU

Least Liked
My home
Not enough <u>public</u> open space
Not enough <u>private</u> open space (private outdoor area)
Noisy area
Unsafe area
Too far from the beach
Too far from the linear park
Too far from the hills
Too far from friends
Not enough trees
Not close to family
Unpleasant neighbourhood
Not convenient for shopping
Not convenient for schools
Too far away from work
Not enough entertainment and recreation facilities nearby
Poor public transport
Surrounding homes are unattractive
Not convenient for restaurants or cafes
Traffic congestion
Too far away from where I study
No community feel
Don't know
Other <i>[specify]</i>

7. I would now like to seek your opinion on a series of features that could apply to the Adelaide City Centre. When I mention the Adelaide City Centre I am referring to the area bounded by North Terrace, West Terrace, South Terrace and East Terrace. CONFIRM THIS IS CLEAR

I will read out a feature and then ask you how important that feature was when you chose the Adelaide City Centre as a place to live with 10 being very important through to 1 being not at all important.

THEN FOR EACH STATEMENT WITH AN IMPORTANCE SCORE OF 5 OR MORE

And how satisfied are you with this aspect of city living with 10 being very satisfied through to 1 being not at all satisfied? SP

	Importance (1 to 10)	Satisfaction (1 to 10) where Importance scores 5 or more
A good place to bring up kids		
A premium address		
A safe & secure place to live		
A tranquil place to live		
Access to a range of entertainment options		
Access to interesting festivals & events		
Access to sporting facilities		
Access to recreation facilities		
Bike friendly		
Cafés & restaurants		
Childcare facilities		
Convenient car parking		
Convenient for private schools		
Convenient for public schools		
Convenient for universities		
Convenient for weekly shopping		
Convenient to work or place of study		
Private outdoor area		
Reduced reliance on a car		
Easy to walk around		
Lots of parks with trees		
Medical facilities and services		
Public libraries		
Safe areas for children to play outdoors		
Specialty shops such as a butcher, greengrocer & newsagent		
Tree lined streets		
A vibrant & lively place to live		
Good public transport		

ASK THE FOLLOWING QUESTION IF 'Good public transport' is rated in importance as 5 or more in the previous question.

8. In the previous question you rated 'Good public transport as important to you'. How satisfied are you with the following aspects of public transport with 10 being very satisfied through to 1 being not at all satisfied?

	Satisfaction (1 to 10) where Importance scores 5 or more
Value for money	
Frequency of the service	
Proximity to your home	
Proximity to your workplace or place of study	
Reliability of the service	
Feeling safe using the service	
Ability to easily get to where you want to go	

IF PRIMARY PLACE OF WORK OR STUDY POSTCODE IS NOT 5000

9. What is your main method of transport from your home to where you work or study? SP

Car	1
Motorbike	4
Public Transport (Bus, Train, Tram)	2
Pushbike	3
Walk	5
Other – don't specify	6

10. Approximately how much time do you spend travelling from your home to where you work or study each day including the return trip? SP

Less than 20 mins	1
20 mins to less than 40 mins	4
40 mins to less than 60 mins	2
60 mins to less than 80 mins	3
80 mins to less than 100 mins	5
100 mins or more	6

11. Which of the following best describes the type of home you currently live in? SP

Single or double storey house – goto Q14	1
Single or multi-storey house terrace or townhouse – goto Q14	2
Single storey flat or unit – goto Q14	3
Multi-storey apartment	4
Other dwelling – goto Q14	5
Not sure – goto Q14	6

12. What do you find most attractive about living in an apartment? MU

No garden	1
Ability to 'lock up and leave'	2
Small size	3
Low maintenance	4
Security/intercom	5
Having a balcony	6
Common areas maintained by someone else	7
Price – value for money	8
Views	9
Shared facilities such as laundry and storage	10
Nothing	11
Other (specify)	12

13. And what do you find least attractive about living in an apartment? MU

No garden	1
No privacy	2
Small size	3
No/inadequate storage	4
Price – value for money	5
Noise from other apartments	6
Shared facilities such as laundry and storage	7
Small or no balconies	8
High strata fees	9
Can't have a pet	10
Noise from the street/traffic	11
Lack of car parking for visitors	12
Nothing	13
Other (specify)	14

14. Do you currently rent or own your home either outright or with a mortgage? SP

Own outright	1
Own with a mortgage	2
Rent – goto Q16	3
Other tenure type – goto Q16	4

15. What would you estimate to be the value of your current home (interviewer to start at \$400,000)? SP

Less than \$100,000	1
\$100,000 to less than \$200,000	2
\$200,000 to less than \$300,000	3
\$300,000 to less than \$400,000	4
\$400,000 to less than \$500,000	5
\$500,000 to less than \$600,000	6
\$600,000 to less than \$700,000	7
\$700,000 to less than \$800,000	8
\$800,000 to less than \$900,000	9
\$900,000 to less than \$1,000,000	10
\$1,000,000 or more	11
Not sure	12
Do not own a home currently	13

16. How long have you lived in the City? SP

Less than 12 months	1
1 year to less than 2 years	2
2 years to less than 3 years	3
3 years or more	4

17. Had you previously lived in an apartment or terrace before you moved to the City? SP

Yes apartment	1
Yes terrace	2
Yes both terrace and apartment	3
No	4

18. How many cars were in your household prior to moving to the City and how many cars do you now have that you park in the City? SP

Previous number of cars	
Current number of cars	

19. What was the main reason for you moving to the City and to what extent have your expectations been met in relation to this reason for moving with 10 being all expectations met through to 1 being no expectations have been met? SU

Main Reason	Expectations Met
	(1 to 10)

20. Were there any other reasons for you moving to the City? MU

Yes - specify	1
No	

21. Which other areas did you consider before moving to the City? MU

	1
No other areas	2
Not sure	3

22. To what extent did the following influence your decision to move to the city?

	Very strong extent	Strong extent	Some extent	Not to any extent	Not sure
Advice from family members	1	2	3	4	5
Advice from friends	1	2	3	4	5
Advice from work colleagues	1	2	3	4	5

23. Have your living expenses increased, decreased or stayed about the same since moving to the City? MU

Increased	1
Decreased	2
Stayed about the same	3
Not sure	4

24. Has your leisure time increased, decreased or stayed about the same since moving to the City? MU

Increased	1
Decreased	2
Stayed about the same	3
Not sure	4

25. In your view, which of the following statements describe the Adelaide City Centre? MP ROTATE

A Green City	1
A Boutique City	2
A Smart City	3
An Environmentally Friendly City	4
An Entrepreneurial City	5
A Cosmopolitan City	6
A Multicultural City	7
An Arts and Culture City	8
A Creative City	9
An Innovative City	10
A Beautiful City	11
A City of Business	12
A Progressive City	13
A Vibrant City	14
An attractive City to buy a home in which to live	15
An attractive City to buy a home as an investment property	16
A Liveable City	17

REDUCED STATEMENT SET FOR ADELAIDE CITY RESIDENTS

26. I would now like to ask you some questions which will help us better understand the types of people who are participating in this survey. These questions seek your opinions so there are no right or wrong answers. I will read you a statement and then ask how strongly you agree or disagree with that statement (interviewer to read out range of options). SP

	Strongly agree	Agree	Not sure	Disagree	Strongly disagree
I'd describe myself as kind of adventurous and outgoing	1	2	3	4	5
I have a clear idea of my goals in life	1	2	3	4	5
The idea of living in an apartment really appeals to me	1	2	3	4	5
I would prefer to live in an area where most of the people come from backgrounds that are similar to my own	1	2	3	4	5
I would prefer to live in a development that includes the latest in environmental initiatives	1	2	3	4	5
Safety and security is an important consideration for me when I'm choosing somewhere to live	1	2	3	4	5
I prefer to walk or ride my bike whenever possible instead of using my car	1	2	3	4	5
I would prefer to live on a large traditional block of land	1	2	3	4	5
Keeping in close contact with my family is very important to me	1	2	3	4	5
I would like to live in a development that is protected by locked gates or a guard	1	2	3	4	5
I'm pretty active when it comes to keeping fit or playing sport	1	2	3	4	5
Peace and quiet is an important consideration for me when I'm choosing somewhere to live	1	2	3	4	5
I think most people that know me well would consider me to be a confident person	1	2	3	4	5
I would be prepared to pay more for electricity that is generated from renewable resources such as wind and solar, also known as 'green power'	1	2	3	4	5
I'd describe myself as a bit of a homebody	1	2	3	4	5
The idea of living in or very close to the city really appeals to me	1	2	3	4	5
I would prefer to live in an area where all the homes are of a similar style and quality	1	2	3	4	5
I think it's important that standards are set and enforced for new housing developments to	1	2	3	4	5

protect my investment					
I like the freedom of not having to comply with rules and regulations	1	2	3	4	5
I would prefer to live in a contemporary style, architecturally designed home	1	2	3	4	5
I consider myself to be a cultured person	1	2	3	4	5
A sense of community is an important consideration for me when I'm choosing somewhere to live	1	2	3	4	5
I have travelled a lot around Australia or overseas	1	2	3	4	5
I see myself as a trendsetter	1	2	3	4	5
I would be prepared to pay a premium for a house that is energy efficient	1	2	3	4	5
I feel really uncomfortable when I'm out of my normal environment	1	2	3	4	5
I'm more concerned with what I think, than what other people think of me	1	2	3	4	5
I consider myself to be a bit of a risk taker	1	2	3	4	5
I don't think Australians are doing enough to combat climate change	1	2	3	4	5
I think most people that know me well would consider me a competitive person	1	2	3	4	5
A sense of space and openness is important to me	1	2	3	4	5
I would prefer to live in an area where there is a mix of people from different backgrounds	1	2	3	4	5
The value of your own home is always affected by the appearance of the surrounding homes	1	2	3	4	5
I consider myself to be a well-educated person	1	2	3	4	5

27. Do you plan to move within the next 5 years? SP

Yes to another home in the Adelaide City Centre	1
Yes to another home outside of the Adelaide City Centre	2
No – goto Q31	3
Not sure – goto Q31	4

28. What would be your main reasons for moving? MU

A larger home with more room	1
A smaller home that's easier to maintain	2
A better suburb	3
Closer to work	4
Closer to friends or family	5
Closer to school for kids	6
Other - specify	7

DO NOT ASK IF Q27 = Yes to another home in the Adelaide City Centre

29. Which of the following areas would you consider moving to? MP

North Adelaide	1
Inner eastern suburb	2
Inner western suburb	3
Inner southern suburb	4
Inner northern suburb	5
Outer southern suburb	6
Outer northern suburb	7
Adelaide Hills	8
Regional area (don't specify)	10
Interstate or overseas (don't specify)	11
Other (don't specify)	12
Not sure	13

30. Taking into account your budget, to what extent would the following types of homes be attractive to you (interviewer to read out list of options)? SP

	Very attractive	Attractive	Not sure	Not attractive
Detached home on a block of land	1	2	3	4
Townhouse or terrace house	1	2	3	4
Apartment in a 3 to 4 storey building	1	2	3	4
Apartment in a 5 to 8 storey building	1	2	3	4
Apartment in a 9 to 12 storey building	1	2	3	4
Apartment in a building of more than 12 storeys	1	2	3	4
Retirement unit	1	2	3	4
Other (don't specify)	1	2	3	4

31. For the following question, I would like you to imagine you are about to purchase a new home which could be anywhere. If you had a fixed amount of money to buy this home, which of the following options would you choose? SP

A home with parking for two cars	1
Or a home with parking for one car and easy access to good public transport	2
Not sure	3

32. I would now like you to imagine you are about to purchase a new home which could either be in the City or an identical home in an area close to but outside of the City. If the home in the City was more expensive than the identical home outside of the City, which area would you choose to live in? SP

A less expensive home in an area close to but outside of the City	
A more expensive identical home in the City	
Not sure	

Q33 & Q34 are to be asked of respondents who answered either very attractive or attractive to apartment living in q30 everyone else skip to Q35

33. What would you find most attractive about living in an apartment? MU

No garden	1
Ability to 'lock up and leave'	2
Small size	3
Low maintenance	4
Security/intercom	5
Having a balcony	6
Common areas maintained by someone else	7
Price – value for money	8
Views	9
Shared facilities such as laundry and storage	10
Nothing	11
Other (specify)	12

34. And what would you find least attractive about living in an apartment? MU

No garden	1
No privacy	2
Small size	3
No/inadequate storage	4
Price – value for money	5
Noise from other apartments	6
Shared facilities such as laundry and storage	7
Small or no balconies	8
High strata fees	9
Can't have a pet	10
Noise from the street/traffic	11
Lack of car parking for visitors	12
Nothing	13
Other (specify)	14

35. How likely would you be to move from your current home and rent a property in which to live at some stage during the next five years? SP

Very likely	1
Likely	2
Unlikely – goto 45	3
Not sure – goto q45	4

36. When do you think you will be ready to rent a new property? SP

Within the next 12 months	1
Within the next 24 months	2
Within the next 36 months	3
More than 36 months	3
Not sure	4

37. In which of the following areas do you plan to rent this property? MP

Adelaide City Centre excluding North Adelaide	1
North Adelaide	2
Inner eastern suburb	3
Inner western suburb	4
Inner southern suburb	5
Inner northern suburb	6
Outer southern suburb	7
Outer northern suburb	8
Adelaide Hills	10
Regional area (don't specify)	11
Other (don't specify)	12
Not sure	13

IF ADELAIDE CITY CENTRE NOT ONE OF THE AREAS CONSIDERED:

38. I notice you didn't choose the Adelaide City Centre as one of the areas you would consider. What are your main reasons for this? MP

	1
Don't know/not sure	2

39. Which of the following options would best match the amount of rent you would be prepared to pay each week for this property (interviewer to start at \$300)? SP

Less than \$100	1
\$100 to less than \$200	2
\$200 to less than \$300	3
\$300 to less than \$400	4
\$400 to less than \$500	5
\$500 to less than \$600	6
\$600 to less than \$700	7
\$700 to less than \$800	8
\$800 to less than \$900	9
\$900 to less than \$1,000	10
\$1,000 or more	11
Not sure	12

40. And what advantages would this rental property have? MU

A larger home with more room	1
A smaller home that's easier to maintain	2
A better suburb	3
Closer to work	4
Closer to friends or family	5
Closer to school for kids	6
Cheaper rent	7
Other - specify	8

41. Taking into account your budget, to what extent would the following types of homes be attractive for you to rent (interviewer to read out list of options)? SP

	Very attractive	Attractive	Not sure	Not attractive
Detached home on a block of land	1	2	3	4
Townhouse or terrace house	1	2	3	4
Apartment in a 3 to 4 storey building	1	2	3	4
Apartment in a 5 to 8 storey building	1	2	3	4
Apartment in a 9 to 12 storey building	1	2	3	4
Apartment in a building of more than 12 storeys	1	2	3	4
Retirement unit	1	2	3	4
Other (don't specify)	1	2	3	4

42. In the following questions I would like to ask you about some of the features you might like in your rental property? SP

How many bedrooms would you prefer	Min can be zero
How many bathrooms would you prefer	Min can be zero
How many living areas would you prefer	Min can be zero
How many car spaces would you prefer	Min can be zero
Would you like an outdoor entertainment area	Yes / No

Q43 & Q44 are to be asked of respondents who answered either very attractive or attractive to apartment living in Q41 everyone else skip to Q45

43. What would you find most attractive about living in an apartment? MU

No garden	1
Ability to 'lock up and leave'	2
Small size	3
Low maintenance	4
Price – value for money	5
Views	6
Shared facilities such as laundry and storage	7
Nothing	8
Other (specify)	9

44. And what would you find least attractive about living in an apartment? MU

No garden	1
No privacy	2
Small size	3
No storage	4
Price – value for money	5
Noise from other tenants	6
Shared facilities such as laundry and storage	7
Small or no balconies	8
Nothing	9
Other (specify)	10

45. Please imagine you were seeking information on an area in which to live. Which of the following information sources would you use? MP

Local paper such as the Messenger	1
The Advertiser	2
The Sunday Mail	3
Realestate.com.au	4
General search on the Internet	5
Local real estate agent	6
Drop into a display village	7
Talk to family or friends	8
Visit a builders' website	9
Other - specify	10
Not sure	11

To finish, could I please ask you a few questions about yourself?

46. Which of the following categories best describes your household situation? SP

Lone person household	1
Group household of unrelated adults	2
Young couple, no children	3
Older couple, no children at home	4
Couple or single parent with mainly pre-school children	5
Couple or single parent with mainly primary school children	6
Couple or single parent with mainly teenage children	7
Couple or single parent with mainly adult children still living at home	8

47. Which of the following best describes your occupation? SP

Senior managerial/professional	1
Clerical/white collar	2
Skilled blue collar/tradesperson	3
Semi-skilled blue collar	4
Unemployed and looking for work	5
Student – full time	6
Student – part time	7
Self-funded retiree	8
Pensioner	9
Home duties	10
Other – don't specify	11

48. Which of the following best describes your total annual household income before tax? SP

\$0 - \$19,999	1
\$20,000 - \$39,999	2
\$40,000 - \$59,999	3
\$60,000 - \$79,999	4
\$80,000 - \$99,999	5
\$100,000 - \$129,999	6
\$130,000 - \$149,999	7
\$150,000 +	8
Refused	9

49. Which of the following social media sites do you use at least once a week? MP

Facebook	1
YouTube	2
Tumblr	3
LinkedIn	4
Blogspot	5
Twitter	6
Instagram	7
Snapchat	9
Flickr	10
Pinterest	11
Chat rooms or forums	12
Other (don't specify)	13

It is possible that we will undertake further research residential living. This would be in the form of discussion groups for which we would pay participants \$100? Would you be interested in participating in such a group? SP

Yes – (record name, email address and preferred contact telephone number)	1
No	2