



ADELAIDE CITY LIVING MARKET RESEARCH

VOLUME 1 — ADELAIDE METROPOLITAN MARKET

Collaborative Thinking. Positive Outcomes.

A joint initiative of

CAPITAL CITY
COMMITTEE



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 24% of the Adelaide metropolitan market 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 9% of the Adelaide market and does not have the disposable income of the Cosmopolitans.

In terms of the Adelaide metropolitan market, safety and security, safe areas for children to play **outdoors**, **'a good place to bring up kids'**, **walkability and medical facilities** / services were the top five most important features nominated by participants when choosing a place to live. The city rated well on walkability and access to medical assistance and in the middle range for safety and security. Child friendliness scores were lower and this is an area for work, particularly if the city wishes to attract more families.

The city is associated with professionals, young singles and older couples who are still working but without children at home. Only a small proportion of the sample currently lives in an apartment, however for those who do **the small size of the dwelling, 'low maintenance', no garden, 'lock up and leave', price (value for money) and 'views' are the most attractive features.** Noise from other apartments, small size of the dwelling and no garden were by far the least attractive features.

For the 80% of Cosmopolitans who own their own home (either outright or with a mortgage), 48% value it at between \$500,000 and \$1 million. A further 13% value their home at over \$1,000,000. Almost a quarter of this segment reported **'knowing a lot about the Adelaide CBD as a place to live'** with a further 70% knowing **'something'** or **'a little'** about the city centre as a place to live.

Adelaide CBD is perceived as a **'Liveable City'**, **'An Arts and Culture City'**, **'A Multicultural City'** and a **'Beautiful City'** by a majority of study participants and the Cosmopolitan segment specifically. The city is not perceived as overly **'smart'**, **innovative** or **entrepreneurial**.

Over one third of total respondents report being likely to purchase a property in the next five years (36%) increasing to 46% of the Cosmopolitans. Nearly a quarter (24%) of the Cosmopolitans looking to purchase in the next five years plan to purchase in the CBD, 10% in North Adelaide, 28% in an inner eastern suburb and 34% in an inner western suburb.

Overall, 16% of those looking to purchase a property in the next five years plan to purchase in the city. Too expensive and too busy, congested, noisy or cramped are key reasons provided for not considering the CBD. Almost half of those considering a purchase nominated \$400,000 to less than \$800,000 as their budget.

In terms of the type of home to be purchased, a detached home, townhouse or terrace house were most popular, however over a quarter indicated that an apartment in a three to four storey apartment development would be an attractive option. In terms of features, over 50% of the sample and the Cosmopolitans as a sub group, report wanting three bedrooms, two bathrooms, two living areas and two car spaces.

In terms of renting, 19% of the sample reported being likely to relocate to a rental property within the next 5 years, with 23% of this group indicating that they plan to rent this in the city.

In terms of information when looking to relocate, Realestate.com was nominated by 73% of the sample as an information source, followed by **'General search on the Internet'** (57%) and **'Talk to family or friends'** (46%).

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/).

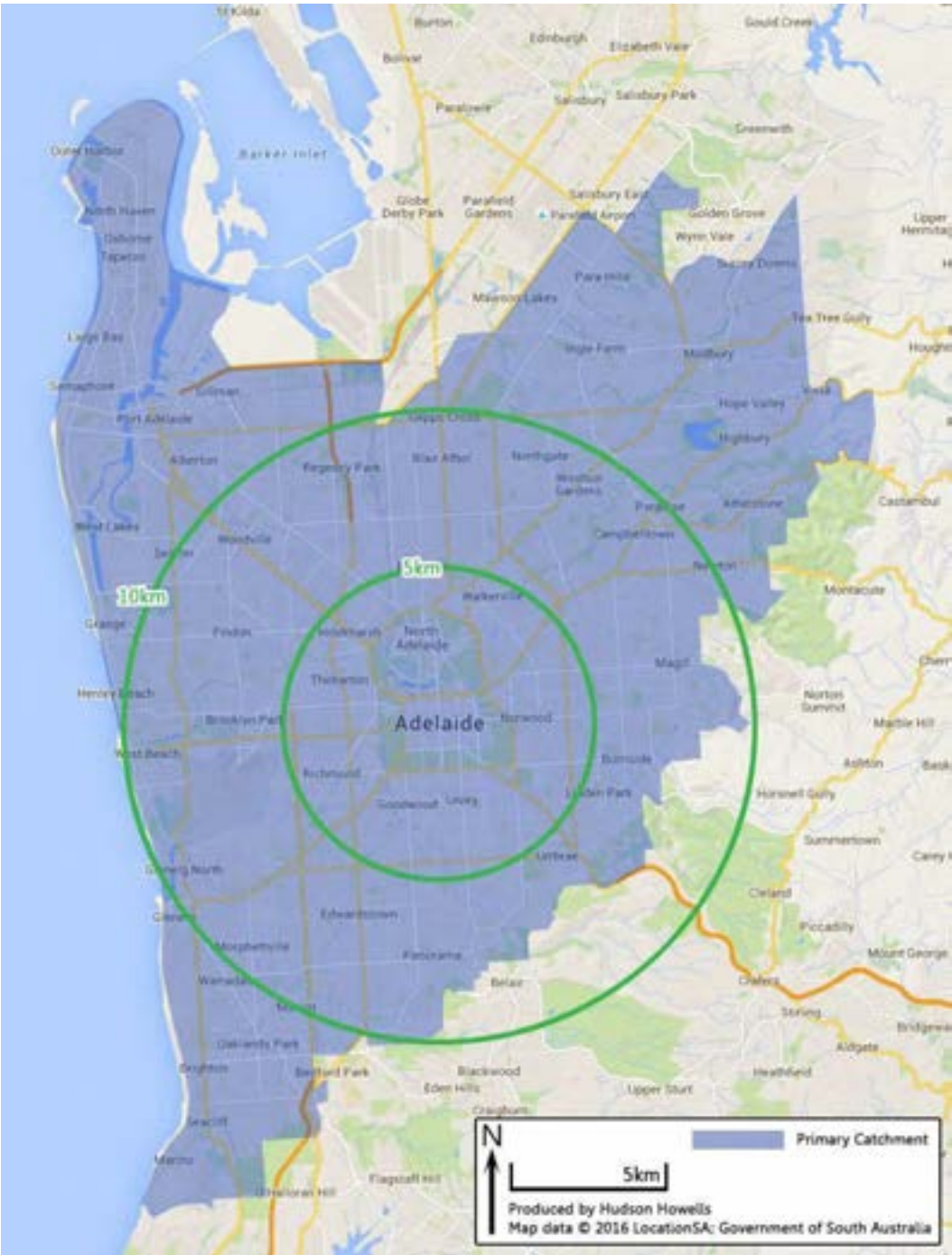
This report provides an overview of the results of the Adelaide metropolitan market survey (Volume 1).

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	<p>7 Separate Focus Groups -</p> <ol style="list-style-type: none"> 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) <p>(Groups 2 to 7 were drawn from the Cosmopolitans market segment)</p>	51 participants (total)

A sample of 1,000 people (over 18 years of age) from within the metropolitan Adelaide catchment highlighted below were surveyed via telephone for this component of the research. The survey was approximately 30 minutes long and is contained in Appendix 1.



A total of 987 usable interviews were completed. It is noted that while 1,000 interviews were conducted, 13 survey responses were rejected during the final quality control process which ensures that only valid responses are included in the survey sample.

A sample size of 1,000 (or 987) provides a confidence interval (also called margin of error) of plus-or-minus 3.1% 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 46.9% (50-3.1) and 53.1% (50+3.1) would have picked that answer.

The confidence level indicates how certain you can be that a response is representative of the entire population. 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 survey incorporated a psychographic segmentation of the market and the findings provide a highly detailed analysis of the market.

This study also incorporates a brand image analysis. This analysis examines the market's perceptions of the Adelaide CBD brand and examines the competitive environment.

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 **the market’s** 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.

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.

The raw data from question 20 of the survey were the basis upon which the segments were identified. All data were provided to Strategy By Design, who analysed and weighted sorted percentage difference scores, for solutions in 4 through to 8 clusters.

The segments (clusters) are determined by the extent of their ‘difference scores’. As an example 45% of the total sample agreed with the statement in question 20 that *“The idea of living in or very close to the city really appeals to me”* whereas 70% of the Cosmopolitans segment agreed with this statement – a difference of plus 25%. In contrast just 31% of the Traditionalists segment agreed with this statement – a difference of minus 14%.

The data from all other questions are mapped back to the segments and a comparison is then made between the ‘average’ response (total respondents) and the relevant segment’s response. An example is gender with 51% of the sample (total respondents) being female. Differences of plus or minus 5% are typically highlighted in the report so it will be noted that the Cosmopolitans have an average percentage of females (49%) whereas the Homebodies have a higher than average percentage of females (60%).

So when the term ‘average’ is used in a segment description it means that for the relevant question (gender, age, household situation, etc.) the segment is not significantly different to the sample as a whole.

Each segment is prioritised as either a primary, secondary or tertiary market segment. From a marketing perspective the main focus will be on the primary and possibly the secondary market segments. While only a very small percentage of a tertiary market segment may take up an offer, in this case living in the Adelaide city centre, **it’s important that the brand proposition doesn’t alienate a tertiary market segment.**

It is important to note that this sample was drawn from people who confirmed they were resident within the primary catchment area (see page 7). **The term ‘population’ used in this report refers to the catchment area population.** Therefore the segments described in this report relate to that population and are unlikely to be reflective, certainly in terms of the respective sizes of the segments, of the overall South Australian population.

3.2 Segment Description and Market Depth

As described above, six segments were identified. Each of these segments has been given a descriptive label and the market depth for the Adelaide metropolitan market identified:

- Segment 1 — Cosmopolitans 24%
- Segment 2 — Homebodies 23%
- Segment 3 — Traditionalists 14%
- Segment 4 — Urbanites 9%
- Segment 5 — Suburbanites 21%
- Segment 6 — Diffidents 9%

Cosmopolitans – 24%

At 24% the Cosmopolitans is the largest of the six segments narrowly ahead of the Homebodies at 23%.

Along with the Urbanites, the Cosmopolitans find the idea of living in or close to the city appealing (70% compared to 45% of the total sample). They also share the Urbanites appetite for medium and higher density residential living with 43% (compared to 27% of the total sample) claiming that living in a terrace or townhouse is appealing and 33% (compared to 21% of the total sample) stating that living in an apartment is appealing.

The Cosmopolitans are so named because of their cosmopolitan outlook on life. This is evidenced by their adventurous and outgoing nature (79% compared to 56% of the total sample), their appetite for travel around Australia and overseas (89% compared to 70% of the total sample), their interest in living in an area where there is a mix of people from different backgrounds (80% compared to 65% of the total sample) and a similar interest in living in a development that has a diverse range of architectural styles (70% compared to 55% of the total sample). They are also more likely to prefer to live in a contemporary style, architecturally designed home (50% compared to 41% of the total sample).

Importantly this is a leadership segment with 63% claiming that in a group situation they often take the lead (compared to 47% of the total sample). They are also confident (93% compared to 79% of the total sample), have a clear idea of their goals in life (88% compared to 78% of the total sample) and prepared to pay a premium for an upmarket brand they can trust (65% compared to 54% of the total sample).

The Cosmopolitans also show an interest in sustainability with 81% preferring to live in a development with the latest in environmental initiatives (compared to 63% of the total sample), 81% prepared to pay a premium for an energy efficient house (compared to 66% of the total sample) and 65% prepared to pay more for electricity generated from renewable resources (compared to 51% of the total sample).

The Cosmopolitans are pretty active when it comes to keeping fit or playing sport (72% compared to 55% of the total sample) and are more likely to walk or ride their bike in preference to using their car (65% compared to 51% of the total sample) and peace and quiet is less of a consideration for this segment when choosing somewhere to live (88% compared to 93% of the total sample) although at 88% it's still an important consideration.

The Cosmopolitans are more likely to take risks (50% compared to 36% of the total sample), be competitive (59% compared to 48% of the total sample) and consider themselves to be cultured (87% compared to 78% of the total sample). **They think that it's important to set and enforce housing standards to protect their investment (91% compared to 80% of the total sample) and a sense of community is important to them when they are choosing somewhere to live (87% compared to 77% of the total sample).**

The Cosmopolitans are less likely to:

- Prefer to live in a traditional style of home (45% compared to 69% of the total sample)
- Describe themselves as a homebody (43% compared to 67% of the total sample)
- Prefer to live on a traditional block of land (45% compared to 68% of the total sample)
- Feel uncomfortable when they are out of their normal environment (9% compared to 30% of the total sample)
- Prefer to live in an area where most of the people come from backgrounds similar to their own (16% compared to 33% of the total sample)
- Prefer to live in an area where all of the homes are of a similar style and quality (29% compared to 42% of the total sample)

The Cosmopolitans are more likely than the overall sample to be ready to purchase a new home or investment property in the next five years. The value of their current homes is also the highest of all segments and they are most likely to rate Adelaide as an attractive city to buy both a home and an investment property. The Cosmopolitans have the highest percentage (58%) of all segments with a budget to purchase a home in the \$400,000 to \$800,000 price band.

The Cosmopolitans are the most likely to claim they know a little to a lot about Adelaide as a place to live and are the most likely to rate Adelaide as both a liveable and a vibrant city.

This segment has a slightly lower percentage of females at 49% and an average age profile with 32% aged 18 to 39 years of age and 48% aged 50 years of age or more with 57% aged between 45 and 69 years of age. This age profile is also reflected in the household pattern with 35% being couples or single parents with mainly adult children still living at home, 23% older couples with no children at home and 11% lone person households.

In terms of employment, 45% of this segment claims to be in either the professional or white collar employment categories (highest segment) with an average percentage of retirees (24%). The Cosmopolitans have the highest household incomes of all segments with 47% having annual incomes of \$80,000 or more.

In summary, at 24% of the overall sample, the Cosmopolitans rate very highly as a primary market segment. The Cosmopolitans segment is clearly the segment that considers Adelaide to be a desirable residential living location and they have the equity in their homes, the income and the budget to attain this. They are engaged, active, confident, leaders who should respond very favourably to a carefully developed and implemented Adelaide city centre residential brand proposition.

Homebodies – 23%

The Homebodies represent 23% of the population, the second largest of the six segments. The Homebodies are so named because they describe themselves as just that – homebodies (93% compared to 67% of the total sample). More than half (54%) of the Homebodies feel uncomfortable outside of their normal environment (compared with 30% of the total sample) and 79% would prefer to live in a traditional home (compared with 69% of the total sample).

The vast majority of Homebodies:

- Believe that safety and security is an important consideration when choosing somewhere to live (98%)
- Value peace and quiet as an important consideration when choosing somewhere to live (96%)
- Consider that privacy is an important consideration when choosing somewhere to live (96%)

The Homebodies are less inclined to:

- Describe themselves as adventurous and outgoing (14% compared to 56% of the total sample)
- Take the lead in a group situation (14% compared to 47% of the total sample)
- Have travelled a lot around Australia or overseas (42% compared to 70% of the total sample)
- Consider themselves to be competitive (21% compared to 48% of the total sample)
- Consider themselves to be confident (54% compared to 79% of the total sample)
- Take risks (12% compared to 36% of the total sample)
- Be active when it comes to keeping fit or playing sport (35% compared to 55% of the total sample)
- Have a clear idea of their goals in life (59% compared to 78% of the total sample)
- Consider themselves to be cultured (62% compared to 78% of the total sample)
- Consider themselves to be a trendsetter (2% compared to 16% of the total sample)
- Consider themselves to be well-educated (79% compared to 90% of the total sample)
- Walk or ride a bike in preference to using their car (40% compared to 51% of the total sample)
- Be more concerned with what they think than what other people think of them (56% compared to 65% of the total sample)
- Prefer to live in a contemporary style, architecturally designed home (32% compared to 41% of the total sample)

In terms of housing, the Homebodies are less inclined to find the idea of living in or very close to the city appealing (30% compared to 45% of the total sample) or find living in a terrace or townhouse appealing (16% compared to 27% of the total sample) with just 13% claiming they would find apartment living appealing.

The Homebodies are much less likely than the overall sample to be ready to purchase a new home or investment property in the next five years. The value of their current homes is also the lowest of all segments and they tend to be average in their inclination to rate Adelaide as an attractive city to either buy a home or an investment property. Their budget to purchase a home is the lowest of all segments (37% with a budget of \$400,000 to \$800,000).

The Homebodies are the least likely to claim they know a little to a lot about Adelaide as a place to live, are average in their tendency to rate Adelaide as a liveable city and the least likely to rate Adelaide as a vibrant city.

This segment has the highest percentage of females at 60% and a slightly older age profile with 32% aged 18 to 39 years of age and 51% aged 50 years of age or more. This segment's **household situation reflects that of the total sample.**

In terms of employment, just 28% of this segment claims to be in either the professional or white collar employment categories (the lowest of all segments) with an above average percentage of retirees (30%), the highest of all segments. The Homebodies have a lower average household income distribution with 24% having annual incomes of \$40,000 or less and 30% having annual incomes of \$80,000 or more, the lowest of all segments.

In summary the Homebodies **don't appear to be overly interested in Adelaide as a place to live. They also have less equity in their homes, lower annual incomes and they don't have the budgets to purchase.** On balance, the Homebodies are ranked as a tertiary market segment for residential living the Adelaide city centre.

Traditionalists – 14%

The Traditionalists represent 14% of the population and this is the fourth largest of the six segments. 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 (89% compared to 68% of the total sample) and a similarly high percentage of people who would prefer to live in a traditional style of home (88% compared to 69% of the total sample).

In other areas of housing, the Traditionalists are less likely to prefer a terrace or townhouse (13% compared to 27% of the total sample) and don't find the idea of apartment living very attractive (7% compared to 21% of the total sample). Just 31% of the Traditionalists find the idea of living in or very close to the city appealing (compared to 45% of the total sample). Along with the Cosmopolitans, the Traditionalists share an interest in sustainability with 78% preferring to live in a development with the latest in environmental initiatives (compared to 63% of the total sample), 82% prepared to pay a premium for an energy efficient house (compared to 66% of the total sample) and 68% prepared to pay more for electricity generated from renewable resources (compared to 51% of the total sample). In addition **70% of the Traditionalists don't think Australians are doing enough to combat climate change** (compared to 60% of the total sample).

The Traditionalists are more concerned with what they think than what other people think of them (79% compared to 65% of the total sample), would prefer to live in an area where all the homes are of a similar style and quality (54% compared to 42% of the total sample), would describe themselves as a bit of a homebody (78% compared to 67% of the total sample) and would prefer to live in an area where there is a mix of people from different backgrounds (76% compared to 65% of the total sample).

The Traditionalists claim to be cultured (88% compared to 78% of the total sample), have a clear idea of their goals in life (88% compared to 78% of the total sample) and are prepared to pay a premium for an upmarket brand they can trust (65% compared to 54% of the total sample).

The vast majority of Traditionalists:

- Consider that a sense of space and openness is important (97%)
- Consider that peace and quiet is an important consideration when choosing somewhere to live (98%)
- Consider themselves to be confident (91%)
- Consider that a sense of community is an important consideration when choosing somewhere to live (91%)

The Traditionalists are much more likely than the overall sample to be ready to purchase a new home or investment property in the next five years. The value of their current homes is a little higher than average and they tend to be average in their inclination to rate Adelaide as an attractive city to either buy a home or an investment property. Their budget to purchase a home is also average (50% with a budget of \$400,000 to \$800,000).

Following on from that theme the Traditionalists are average when it comes to claiming they know a little to a lot about Adelaide as a place to live and are average in their tendency to rate Adelaide as both a liveable city and a vibrant city.

This segment has the second highest percentage of females at 58% and a slightly older age profile. The Traditionalists are more likely to be an older couple with no children at home.

In terms of employment, this segment has the second highest percentage in the professional/white collar employment categories (44%) and an average percentage of retirees (23%). The Traditionalists have average household incomes with 35% having annual incomes of \$80,000 or more.

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. The Traditionalists segment has a slightly older age profile and an average income profile.

The Traditionalists have limited interest in Adelaide as a place to live and overall are ranked as a tertiary market segment for Adelaide.

Urbanites – 9%

The Urbanites represent 9% of the population and along with the Diffidents (also 9%) is one of the two smallest segments. 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 (80% compared to 45% of the total sample) or in higher density developments such as apartments (58% compared to 21% of the total sample) and terrace/townhouse (55% compared to 27% of the total sample).

Interestingly, the Urbanites would like to live in a development that is protected by locked gates or a guard (64% compared to 26% of the total sample), would prefer to live in a contemporary style, architecturally designed home (76% compared to 41% of the total sample) and to live in a development that has a diverse range of architectural styles (85% compared to 55% of the total sample).

The Urbanites segment has a decidedly green tinge with a preference for homes that are energy efficient (89% compared to 66% of the total sample) and developments that include the latest in environmental initiatives (89% compared to 63% of the total sample). The Urbanites are also prepared to pay a premium for an upmarket brand they can trust (84% compared to 54% of the total sample) and see themselves as trendsetters (53% compared to 16% of the total sample). 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 (96%)
- Have a clear idea of their goals in life (92%)
- Consider themselves to be confident (90%)
- Claim that keeping in close contact with their families is important to them (93%)
- Consider that peace and quiet is an important consideration when choosing somewhere to live (91%)
- Consider themselves to be well-educated (92%)
- Consider that safety and security is an important consideration when choosing somewhere to live (95%)

The Urbanites segment is one of three leadership segments (the others being the Cosmopolitans and the Suburbanites) with 78% claiming they often take the lead in a group situation (compared to 47% of the total sample).

The Urbanites are much more likely than the overall sample to be ready to purchase a new home or investment property in the next five years and the value of their current homes is slightly higher than average. Interestingly the Urbanites are less likely to claim that Adelaide is either an attractive city to buy a home or an investment property. However 31% of intending purchasers claim they intend to buy a home in the Adelaide City Centre within the next five years – the highest percentage of all segments. The percentage of Urbanites with a budget of \$400,000 to \$800,000 to purchase a home is much lower than average (41% compared to 49% of the total sample).

The Urbanites claim to know a little to a lot about Adelaide as a place to live (second highest after the Cosmopolitans) but are much less inclined to rate Adelaide as a liveable city and average in their tendency to rate Adelaide as a vibrant city. Quite possibly **it's simply not perceived as trendy or cool enough.**

This segment has the lowest percentage of females (41%) and the youngest age profile with 58% aged 18 to 39 years of age and 32% aged 50 years of age or more. In terms of employment, 39% of this segment claims to be in either the professional or white collar employment categories (average) with the second lowest percentage of retirees (16%). The Urbanites have the second lowest household income with 23% having annual incomes of less than \$40,000 and 33% having annual incomes of \$80,000 or more.

In summary, at 9% of the overall sample the Urbanites rate as a secondary market segment for Adelaide residential living. They are attractive because of their strong interest in urban and higher density living. The small size of this segment makes it somewhat unattractive but there appears to be potential for purchasers who have the ability to **secure a mortgage and renters who can't stretch to home ownership. The research findings suggest that the Adelaide city centre brand may not currently be an ideal alignment for this segment.**

Suburbanites – 21%

The Suburbanites represent 21% of the population and this is the third largest of the six segments. 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 (85% compared to 69% of the total sample)
- I would prefer to live on a large traditional block of land (83% compared to 68% of the total sample)
- I'd describe myself as kind of adventurous and outgoing (68% compared to 56% of the total sample)
- I have a clear idea of my goals in life (89% compared to 78% of the total sample)
- I think most people who know me well would consider me a competitive person (59% compared to 48% of the total sample)
- A sense of space and openness is important to me (97% compared to 88% of the total sample)

The Suburbanites are one of three leader segments (the others being the Cosmopolitans and the Urbanites) with 60% claiming they often take the lead in a group situation (compared to 47% of the total sample).

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 (31% compared to 63% of the total sample)
- Pay more for renewable energy (26% compared to 51% of the total sample)
- **Agree that Australians aren't doing enough to combat climate change** (40% compared to 61% of the total sample)
- Pay a premium for a house **that's energy efficient** (45% compared to 66% of the total sample)

The Suburbanites are also less inclined to:

- Prefer to live in a development with a diverse range of architectural styles (35% compared to 55% of the total sample)
- Prefer to live in an area where there is a mix of people from different backgrounds (47% compared to 65% of the total sample)
- Feel uncomfortable out of their normal environment (16% compared to 30% of the total sample)
- Pay a premium for an upmarket brand they can trust (40% compared to 54% of the total sample)
- Prefer to walk or ride their bike in preference to using their car (39% compared to 51% of the total sample)
- Describe themselves as a homebody (57% compared to 67% of the total sample)

Not surprisingly the Suburbanites are less inclined to prefer to:

- Live in or close to the city (29% compared to 45% of the total sample)
- Live in a terrace or townhouse (12% compared to 27% of the total sample)
- Live in an apartment (8% compared to 21% of the total sample)
- Live in a contemporary style, architecturally designed home (29% compared to 41% of the total sample)

The vast majority of Suburbanites:

- Consider that peace and quiet is an important consideration when choosing somewhere to live (96%)
- Consider that privacy is an important consideration when choosing somewhere to live (97%)
- Consider that keeping in close contact with their family is important (92%)
- Consider themselves to be well-educated (94%)
- Consider that safety and security is an important consideration when choosing somewhere to live (96%)

The Suburbanites are less likely than the overall sample to be ready to purchase a new home or investment property in the next five years. The value of their current homes is a little higher than average and they are a little less likely to rate Adelaide as an attractive city to either buy a home and or an investment property. Their budget to purchase a home is about average (47% with a budget of \$400,000 to \$800,000).

The Suburbanites are a little less likely to claim they know a little to a lot about Adelaide as a place to live and are average when it comes to rating Adelaide as both a liveable and a vibrant city.

This segment has a lower percentage of females at 46% and an average age profile with 32% aged 18 to 39 years of age and 49% aged 50 years of age or more. In terms of employment, 35% of this segment claims to be in either the professional or white collar employment categories (average) with an average percentage of retirees (28%). The Suburbanites have average household incomes with 18% having annual incomes of less than \$40,000 and 35% having annual incomes of \$80,000 or more.

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. Rather this segment is the province and the dream of the suburban greenfield development marketer and is therefore ranked as a tertiary market segment.

Diffidents – 9%

Along with the Urbanites, the Diffidents represent just 9% of the population and this is the equal smallest of the six segments. 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 (37% compared to 27% of the total sample) and somewhat attracted to apartment living (25% compared to 21% of the total sample) while 45% find the idea of living in or near the city appealing (similar to 45% of the total sample).

The Diffidents claim they will be more likely than the overall sample to be ready to purchase a new home or investment property in the next five years. The value of their current homes is lower than average and they are less likely to rate Adelaide as an attractive city to either buy a home and or an investment property. Their budget to purchase a home is a little lower than average (45% with a budget of \$400,000 to \$800,000).

The Diffidents are a little less likely to claim they know a little to a lot about Adelaide as a place to live and are less likely to rate Adelaide as either a liveable or a vibrant city.

This segment shows a male bias (55%) and has a much younger age profile with 56% aged 18 to 39 years and just 30% aged 50 years or more. More than a third of Diffidents (37%) are couples or single parents with mainly adult children still living at home, 16% lone person households, 14% older couples with no children at home and the highest percentage of groups households of unrelated adults (13%).

In terms of employment, just 14% of this segment are retirees (the lowest of all segments), reflecting the age and household profiles. The Diffidents have lower household incomes with 20% having annual incomes of \$40,000 or less and 33% with incomes of \$80,000 or more.

In summary the Diffidents are a much younger tertiary segment with some potential as renters (highest percentage of renters of all segments).

3.3 Segment Priorities

From a marketing perspective, it is important to prioritise the market segments. The following table contains a segment scorecard. The scorecard is based on the following variables:

- *Leadership* - leadership is an essential element of a high priority market segment.
- *Equity* - the amount of equity a segment member has provides an indication of wealth and borrowing capacity which is important for potential Adelaide City Centre purchasers.
- *Household Income* - critical for loan servicing and therefore important for potential Adelaide City Centre purchasers.
- *Attitude to Higher Density* - Adelaide City Centre offers high density housing so prospective purchasers must be comfortable with this.
- *Interest in the Adelaide City Centre* - important for prospective purchasers.
- *Budget for Home* - prospective **purchasers'** alignment with the Adelaide City Centre price band.

	Leadership	Equity	Household Income	Attitude to Higher Density	Interest in Adelaide City Centre	Budget for Home
Cosmopolitans	✓	✓	✓	✓	✓	✓
Homebodies	✗	✗	✗	✗	—	✗
Traditionalists	✗	✓	—	✗	✗	—
Urbanites	✓	—	✗	✓	✓	✗
Suburbanites	✓	—	—	✗	✗	—
Diffidents	✗	✗	✗	✓	—	—

In summary, at 24% of the overall sample, the Cosmopolitans rate very highly as a primary market segment. The Cosmopolitans segment is clearly the segment that considers Adelaide to be a desirable residential living location and they have the equity in their homes, the income and the budget to attain this. They are engaged, active, confident, leaders who should respond very favourably to a carefully developed and implemented Adelaide city centre residential brand proposition.

At 9% of the overall sample the Urbanites rate as a secondary market segment for Adelaide residential living. They are attractive because of their strong interest in urban and higher density living. The small size of this segment makes it somewhat unattractive but there appears to be potential for purchasers who have the ability to secure a **mortgage and renters who can't stretch to home ownership**. The research findings suggest that the Adelaide city centre brand may not currently be an ideal alignment for this segment.

In summary, each segment has been prioritised as follows:

- Segment 1 — Cosmopolitans 24% Primary market segment
- Segment 2 — Homebodies 23% Tertiary market segment
- Segment 3 — Traditionalists 14% Tertiary market segment
- Segment 4 — Urbanites 9% Secondary market segment
- Segment 5 — Suburbanites 21% Tertiary market segment
- Segment 6 — Diffidents 9% Tertiary market segment

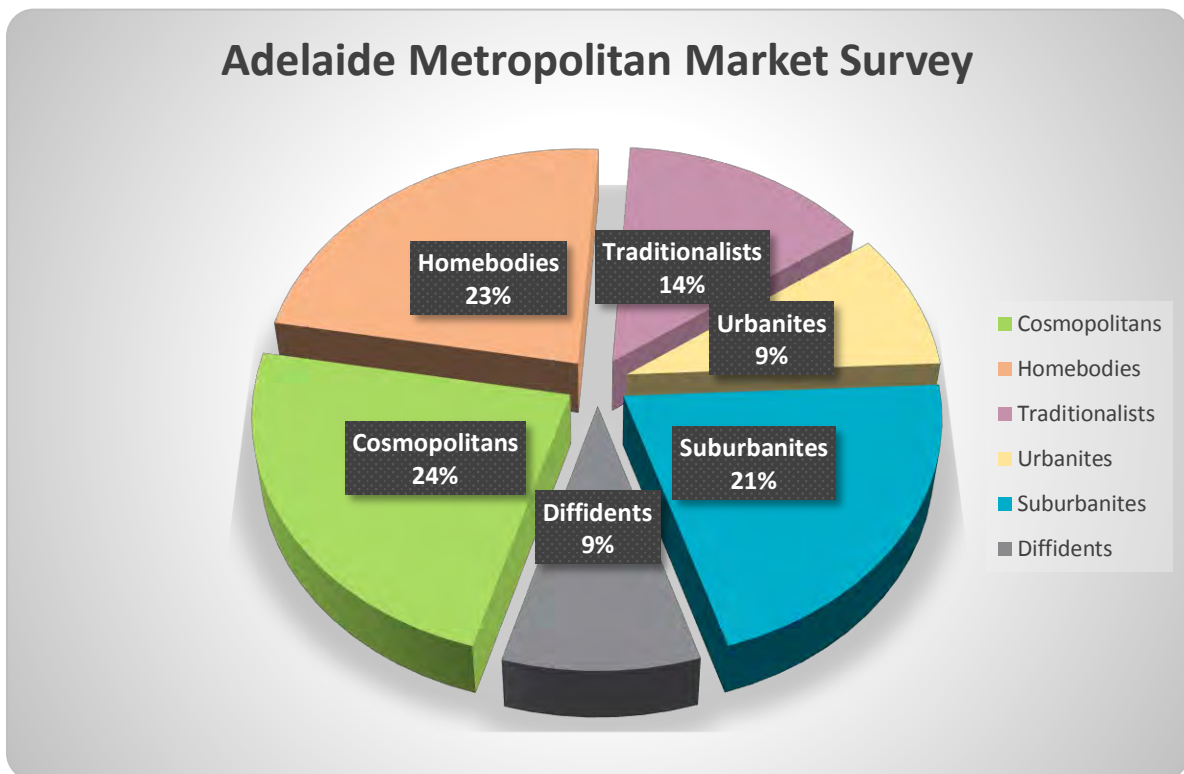
On this basis it is recommended that the Cosmopolitans are the primary market segment with the Urbanites being the secondary market segment. The remaining four are all tertiary market segments. The following table identifies key features of all segments, with the primary and secondary market segments highlighted.

Segment Snapshot		Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
	TOTAL						
(+/- 5% highlighted in blue/red text)	100%	24%	23%	14%	9%	21%	9%
Given travelling time how attractive is living in the city (work in city but don't live in city) – very attractive + attractive	24%	36%	12%	16%	46%	13%	37%
Own home outright	48%	52%	45%	48%	48%	48%	41%
Own with mortgage	30%	28%	30%	36%	24%	34%	29%
Rent	20%	17%	23%	13%	26%	16%	27%
Value of current home - <\$400,000	21%	14%	28%	17%	25%	21%	27%
Value of current home - \$400,000 to <\$700,000	45%	45%	46%	51%	35%	50%	40%
Value of current home - \$700,000+	26%	34%	16%	27%	32%	22%	29%
Likely to purchase a new home or investment property within the next 5 years	36%	45%	23%	45%	46%	29%	42%
Know a little to a lot about Adelaide as a place to live	81%	92%	67%	83%	86%	78%	79%
Adelaide – a Liveable City	68%	77%	67%	72%	49%	67%	61%
Adelaide – a Vibrant City	35%	43%	27%	35%	35%	33%	31%
Adelaide – attractive City to buy a home	42%	52%	41%	41%	36%	38%	36%
Adelaide – attractive for investment property	43%	52%	41%	46%	33%	40%	35%
Plan to buy home in Adelaide CBD within next 5 years (intending purchasers)	16%	24%	13%	5%	31%	7%	16%
Budget To Purchase - \$400,000 to \$800,000	49%	58%	37%	50%	41%	47%	45%
Next home be mainly used as - permanent place to live	46%	48%	54%	44%	52%	41%	39%
Next home be mainly used as - investment property	23%	26%	19%	24%	19%	25%	24%
Next home be mainly used as – retirement property	21%	24%	19%	23%	10%	21%	26%
Trade-off 1 – home with 2 car parks	64%	59%	58%	66%	64%	79%	58%
Trade-off 1 – 1 car park & easy access to good public transport	32%	38%	40%	32%	26%	21%	24%
Trade-off 2 – larger block in the suburbs & 30 min drive to work	58%	43%	71%	68%	60%	69%	50%
Trade-off 2 – apartment where you could walk to work	29%	46%	21%	11%	26%	23%	32%
Gender – female (quota applied)	51%	49%	60%	58%	41%	46%	45%
Age 18 to 39 (quota applied)	36%	32%	32%	30%	58%	32%	56%
Couple or single parent with mainly adult children still living at home	33%	35%	37%	30%	27%	31%	37%
Older couple, no children at home	20%	23%	18%	25%	13%	20%	14%
Lone person household	12%	11%	15%	9%	15%	11%	16%
Occupation - Professional + White Collar	37%	45%	28%	44%	39%	35%	37%
Occupation – Retired (self-funded + pensioner)	24%	24%	30%	23%	16%	28%	14%
Household income <\$40,000	18%	10%	24%	15%	23%	18%	20%
Household income \$40,000 to <\$80,000	21%	16%	22%	21%	24%	22%	25%
Household income \$80,000+	37%	47%	30%	35%	33%	35%	33%

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 questionnaire.

As detailed, a total of 987 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.

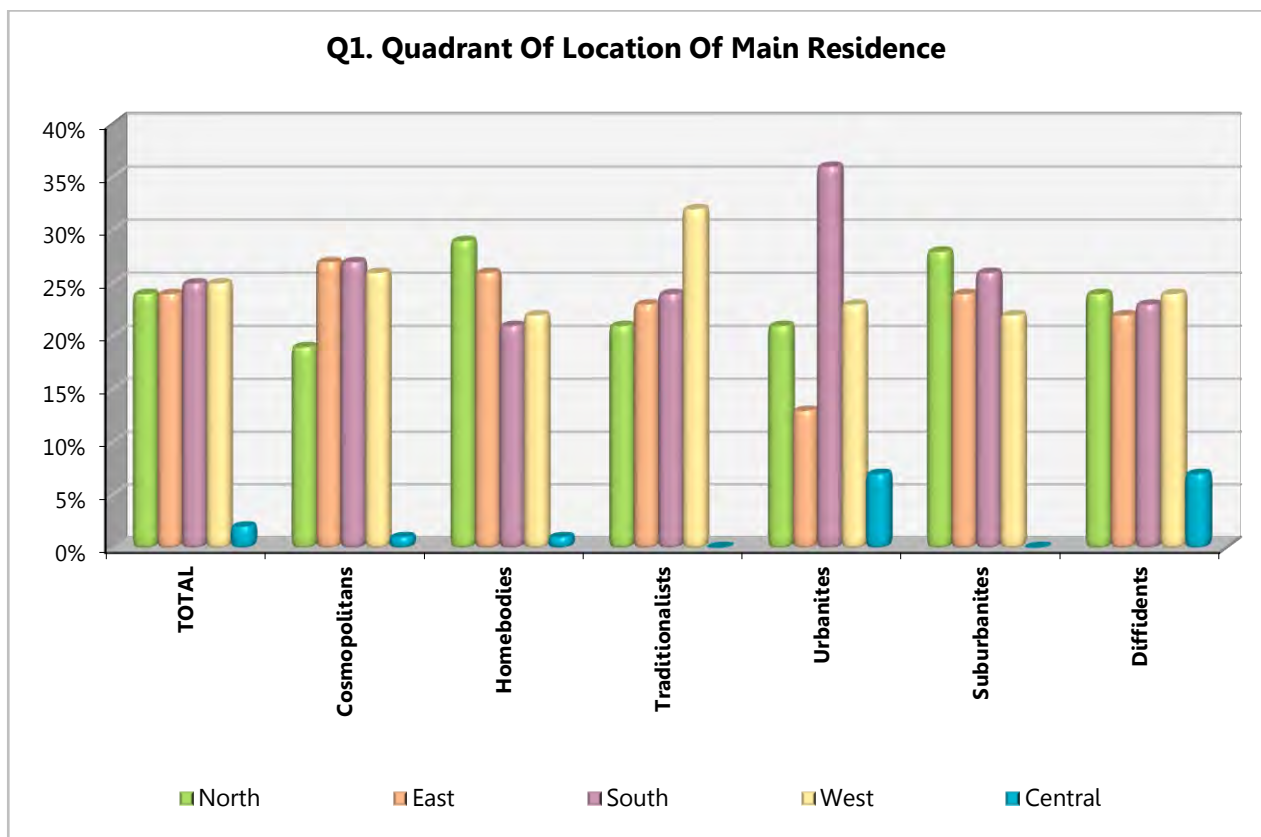
Also, there are some instances where the aggregate of two percentages sums to either + or - 1% of the aggregated figure. This is a result of the rounding of decimal places.

The first three questions were asked at the commencement of each interview in order to determine each potential interviewee's suitability for participation in the survey.

4.1 Place of Residence

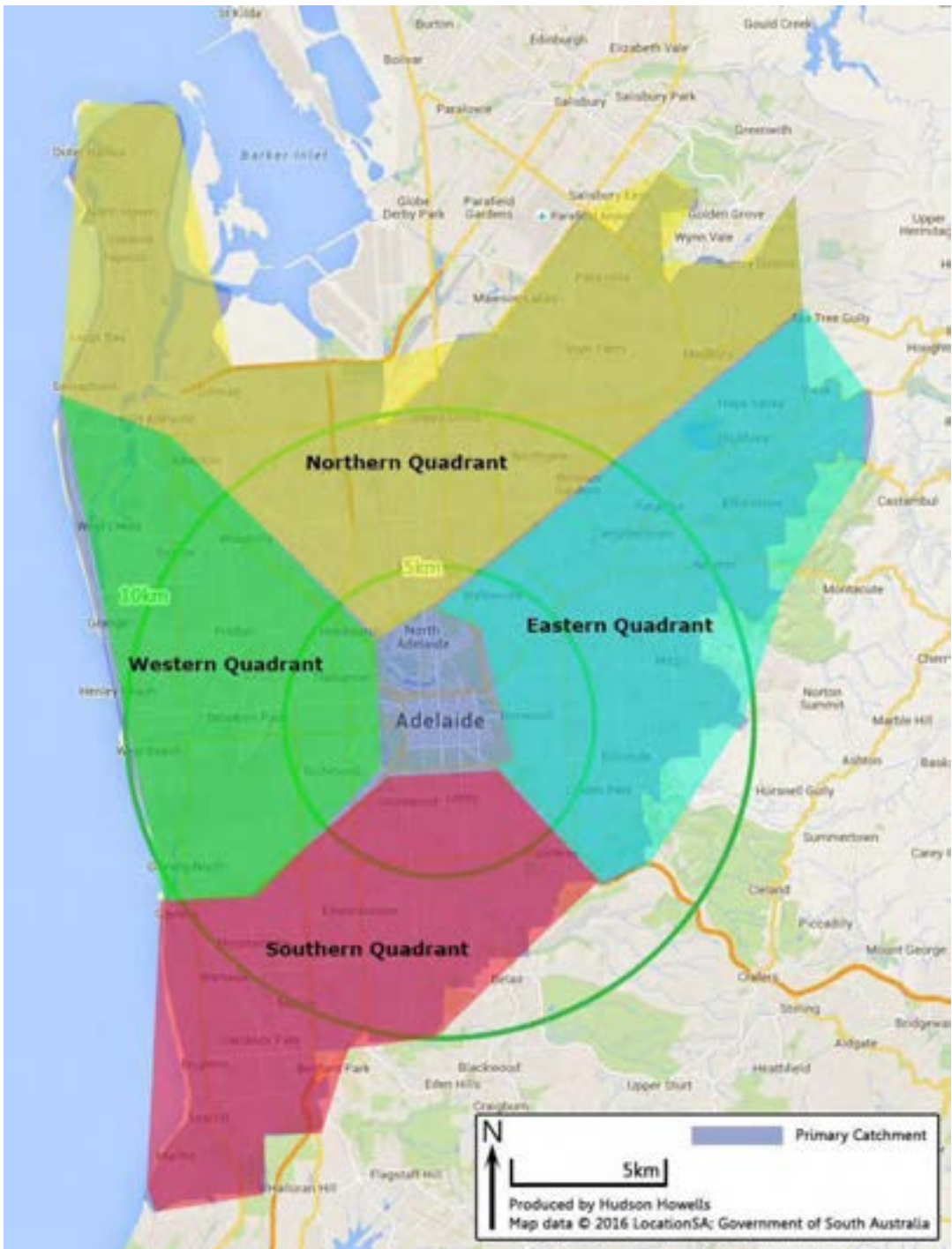
Question 1 - Can I please confirm the suburb and postcode you currently live in and the suburb and postcode you currently work or study in?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
North	24%	19%	29%	21%	21%	28%	24%
East	24%	27%	26%	23%	13%	24%	22%
South	25%	27%	21%	24%	36%	26%	23%
West	25%	26%	22%	32%	23%	22%	24%
Central	2%	1%	1%	0%	7%	0%	7%



The catchment area for the survey was divided into four quadrants plus the central area with approximately 25% of the sample being drawn from each of the four quadrants. Please refer to the following catchment area map.

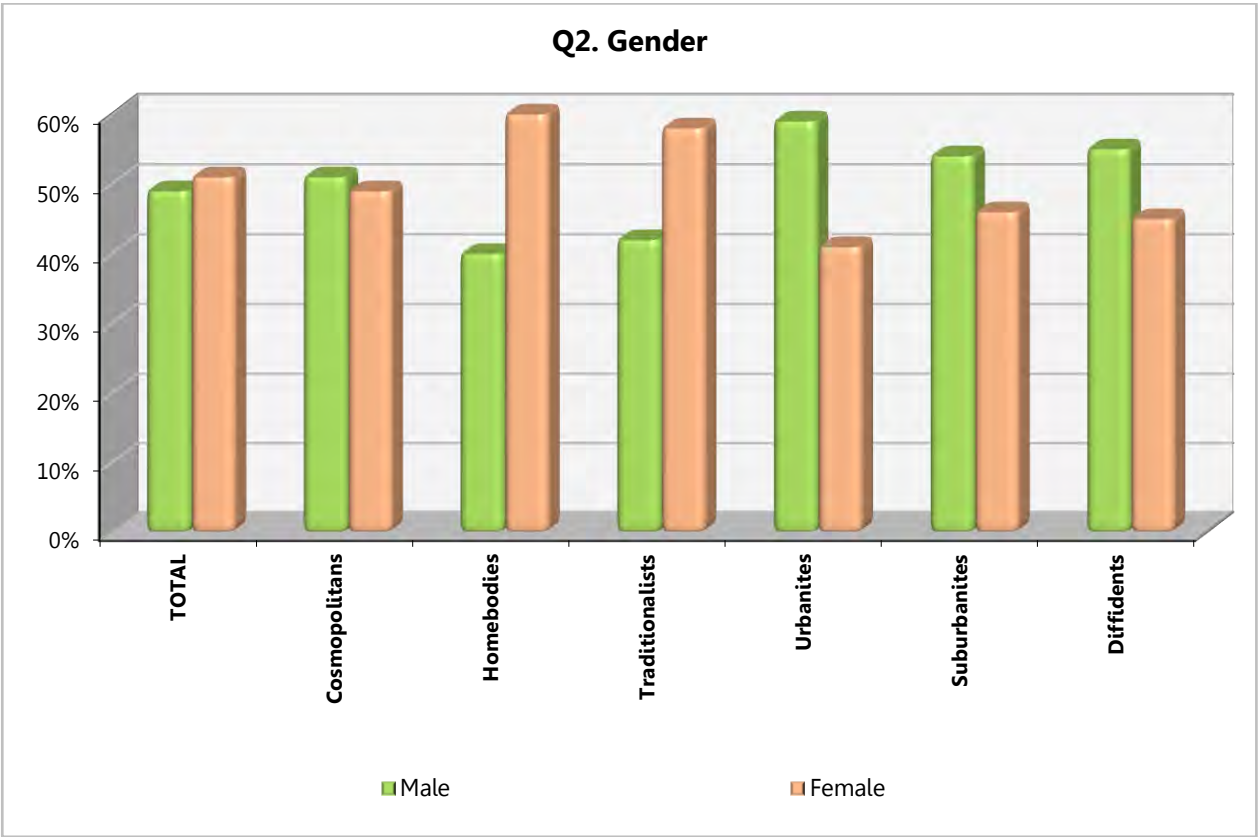
Catchment Area Map



4.2 Demographics

Question 2 - Gender

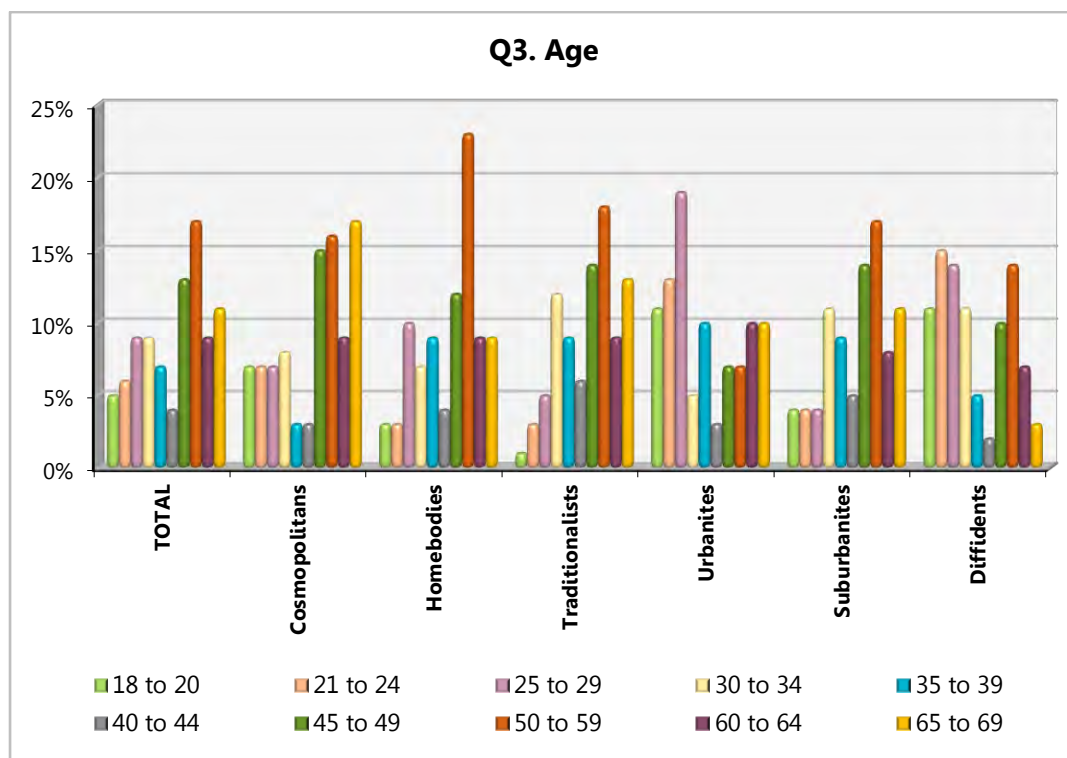
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Male	49%	51%	40%	42%	59%	54%	55%
Female	51%	49%	60%	58%	41%	46%	45%



A sampling quota was imposed to ensure there was an even split of males (49%) and females (51%) represented in the survey.

Question 3 - Which of the following age categories are you in?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
18 to 20	5%	7%	3%	1%	11%	4%	11%
21 to 24	6%	7%	3%	3%	13%	4%	15%
25 to 29	9%	7%	10%	5%	19%	4%	14%
30 to 34	9%	8%	7%	12%	5%	11%	11%
35 to 39	7%	3%	9%	9%	10%	9%	5%
40 to 44	4%	3%	4%	6%	3%	5%	2%
45 to 49	13%	15%	12%	14%	7%	14%	10%
50 to 59	17%	16%	23%	18%	7%	17%	14%
60 to 64	9%	9%	9%	9%	10%	8%	7%
65 to 69	11%	17%	9%	13%	10%	11%	3%
70 to 74	4%	2%	3%	6%	3%	4%	2%
75 or over	6%	4%	7%	4%	2%	9%	4%



A sampling quota for age was imposed as follows:

- 18 to 34 years – 29%
- 35 to 49 years – 25%
- 50 to 64 years – 25%
- 65 years or more – 21%

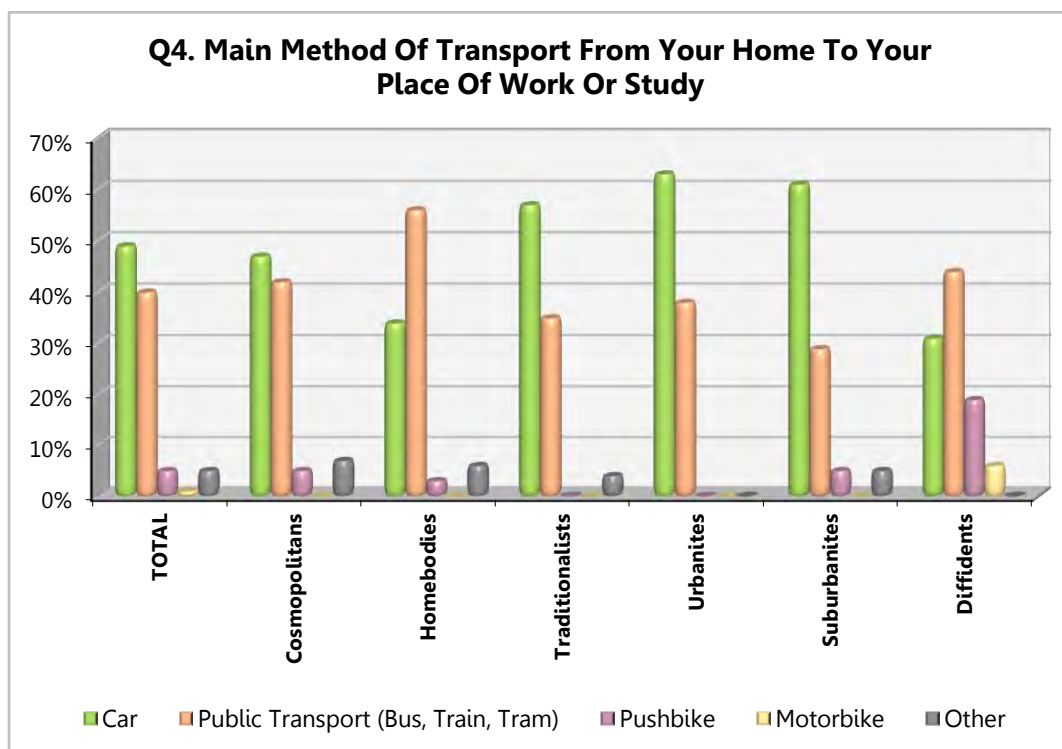
4.3 Transport Trends

Question 4 - If primary place of work or study postcode is 5000 and primary residence is not 5000 what is your main method of transport from your home to your place of work or study?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	188	60	32	23	16	41	16
Car	49%	47%	34%	57%	63%	61%	31%
Public Transport (Bus, Train, Tram)	40%	42%	56%	35%	38%	29%	44%
Pushbike	5%	5%	3%	0%	0%	5%	19%
Motorbike	1%	0%	0%	0%	0%	0%	6%
Walk	1%	0%	0%	4%	0%	0%	0%
Other	5%	7%	6%	4%	0%	5%	0%

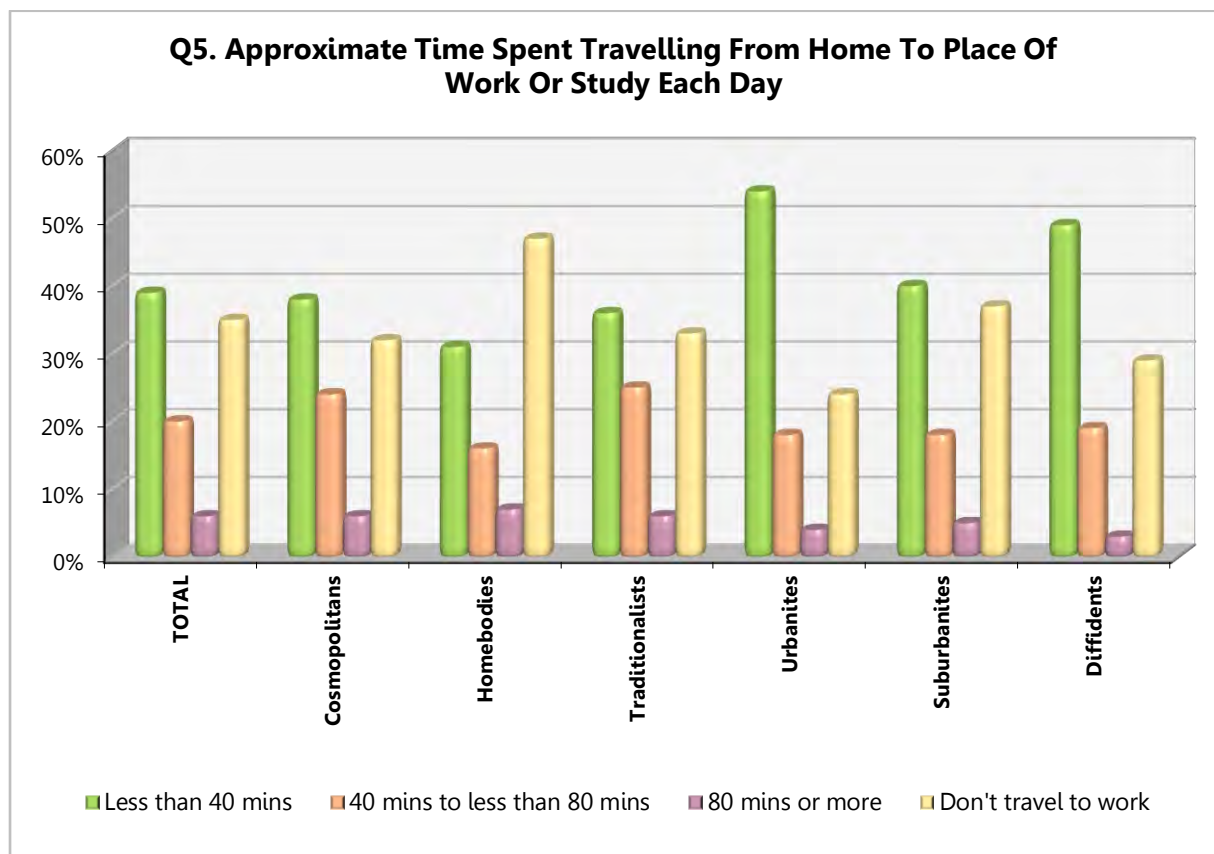
This question was asked of those respondents whose postcode for their primary place of work or study location is 5000 and their primary residence is not 5000 (19% of the total sample).

Nearly half of these respondents drive their car to work or study (49%), increasing to 63% for the Urbanites, 61% for the Suburbanites and 57% for the Traditionalists. Public transport was popular with 40% of these respondents increasing to 56% of the Homebodies segment.



Question 5 - How much time do you spend travelling from your home to your place of work or study each day including the return trip?

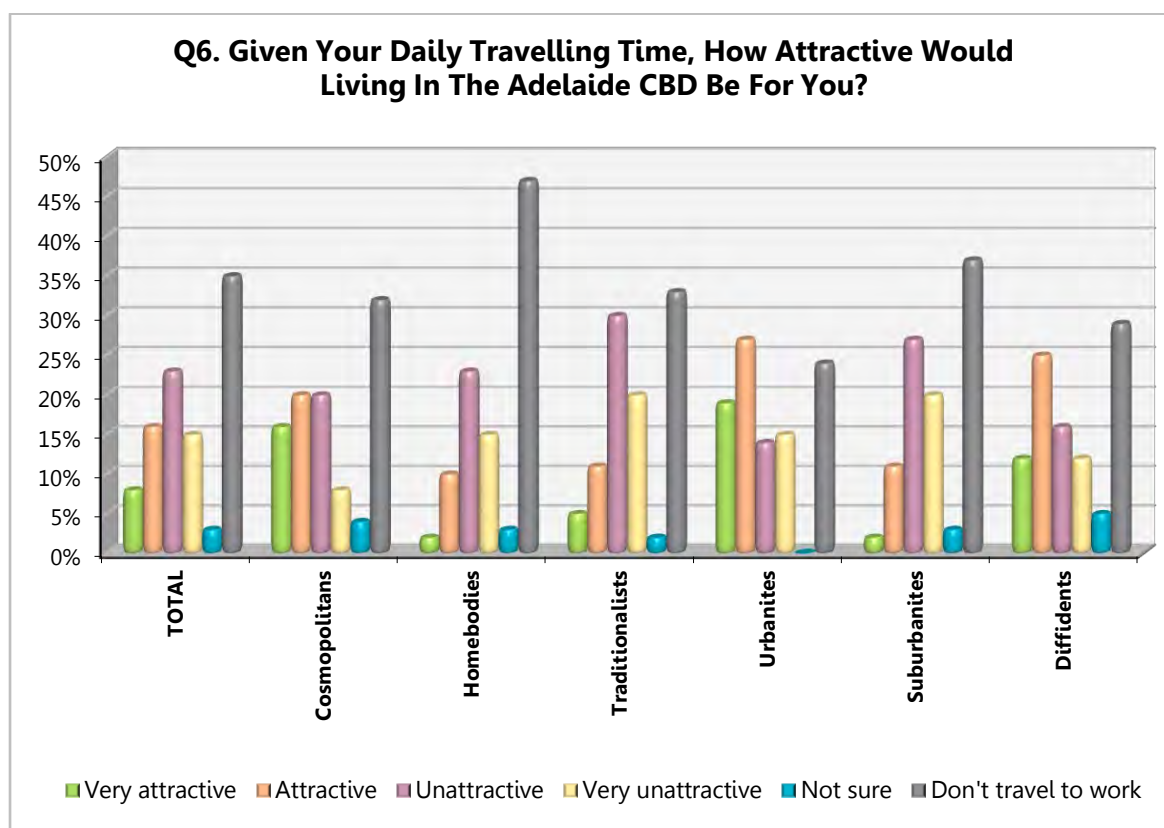
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Less than 20 mins	18%	17%	12%	19%	29%	19%	24%
20 mins to less than 40 mins	21%	21%	19%	17%	25%	21%	25%
40 mins to less than 60 mins	13%	16%	10%	14%	11%	12%	12%
60 mins to less than 80 mins	7%	8%	6%	11%	7%	6%	7%
80 mins to less than 100 mins	3%	4%	4%	1%	1%	2%	3%
100 mins or more	3%	2%	3%	5%	3%	3%	0%
Don't travel to work	35%	32%	47%	33%	24%	37%	29%



Over a third of total respondents spend less than 40 minutes travelling to work or study and home again each day (39%) increasing to 54% of the Urbanites segment. The Homebodies are more likely than other segments not to travel to work (47% compared to 35% of total respondents).

Question 6 - Given your daily travelling time, how attractive would living in the Adelaide CBD be for you?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Very attractive	8%	16%	2%	5%	19%	2%	12%
Attractive	16%	20%	10%	11%	27%	11%	25%
Unattractive	23%	20%	23%	30%	14%	27%	16%
Very unattractive	15%	8%	15%	20%	15%	20%	12%
Not sure	3%	4%	3%	2%	0%	3%	5%
Don't travel to work	35%	32%	47%	33%	24%	37%	29%



When asked given their daily travelling time, how attractive would living in the Adelaide CBD be, nearly a quarter of total respondents claimed living in the Adelaide CBD would be an attractive option (8% very attractive, 16% attractive) increasing to 46% of the Urbanites segment (19% very attractive, 27% attractive). The Traditionalists and Suburbanites segments are more likely to find living in the Adelaide CBD an unattractive option (50% and 47% respectively, compared to 38% of total respondents).

4.4 Suburb Amenity Perceptions

Question 7 - I would now like to seek your opinion on a series of features that could apply to six areas that you might possibly choose to live in. I am still interested in your views on these areas even if you are not planning to move to any of these areas at the moment. I will read you a feature and then ask you how important that feature would be if you were choosing an area to live in with 10 being very important through to 1 being not at all important.

I will then ask you which of the six areas you think this feature applies to. You might think the feature applies to all areas, some of the areas or none of the areas. When I mention the Adelaide CBD throughout this survey I am referring to the area bounded by North Terrace, West Terrace, South Terrace and East Terrace.

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:

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

The following table has been sorted by how important each feature would be if the respondent was choosing an **area to live with the 'Importance' percentage** based on the percentage of respondents who gave the respective feature a score of 10.

The percentages shown under each of the place brands reflect the percentage of respondents who associated the respective feature with that place brand. As an example 52% of total respondents gave 'A safe & secure place to live' an importance score of 10 and 68% of respondents associated this feature with Unley.

Scores of 65% or more are highlighted in yellow text with a blue background with scores of 40% or less being highlighted in green text on a yellow background.

	Importance	Adelaide CBD	North Adelaide	Bowden	Prospect	Norwood	Unley
A safe & secure place to live	52%	52%	60%	47%	53%	66%	68%
Safe areas for children to play outdoors	32%	29%	47%	38%	48%	53%	58%
A good place to bring up kids	30%	35%	50%	45%	57%	66%	68%
Easy to walk around	27%	79%	72%	56%	58%	68%	64%
Medical facilities and services	27%	82%	70%	55%	59%	62%	60%
Convenient car parking	26%	31%	35%	38%	45%	45%	45%
Convenient for weekly shopping	26%	62%	63%	56%	67%	74%	70%
Convenient public transport	26%	87%	67%	58%	60%	63%	62%
A tranquil place to live	24%	26%	48%	32%	44%	50%	59%
Lots of parks with trees	21%	58%	68%	42%	51%	58%	62%
Specialty shops such as a butcher, greengrocer & newsagent	17%	62%	65%	51%	64%	72%	70%
Tree lined streets	15%	40%	66%	39%	54%	65%	69%
A vibrant & lively place to live	13%	73%	61%	41%	45%	64%	52%
Bike friendly	12%	53%	53%	42%	43%	46%	49%
Convenient for public schools	12%	61%	59%	58%	64%	67%	70%
Access to, recreation facilities	11%	69%	66%	52%	57%	64%	63%
Cafés & restaurants	11%	83%	75%	48%	55%	74%	66%
A good place to buy an investment property	10%	56%	52%	55%	51%	54%	54%
Public libraries	9%	80%	56%	50%	58%	61%	63%
Access to a range of entertainment options	8%	87%	60%	44%	44%	57%	46%
Childcare facilities	8%	54%	55%	52%	58%	59%	58%
Convenient for universities	8%	90%	54%	39%	40%	42%	40%
Access to sporting facilities	7%	73%	63%	49%	55%	60%	58%
A premium address	5%	53%	68%	28%	36%	55%	62%
Access to interesting festivals & events	5%	89%	52%	38%	39%	47%	43%
Convenient for private schools	5%	69%	58%	42%	51%	61%	60%

This highlights that the following features are strongly associated (80% or higher) with the Adelaide CBD by all respondents:

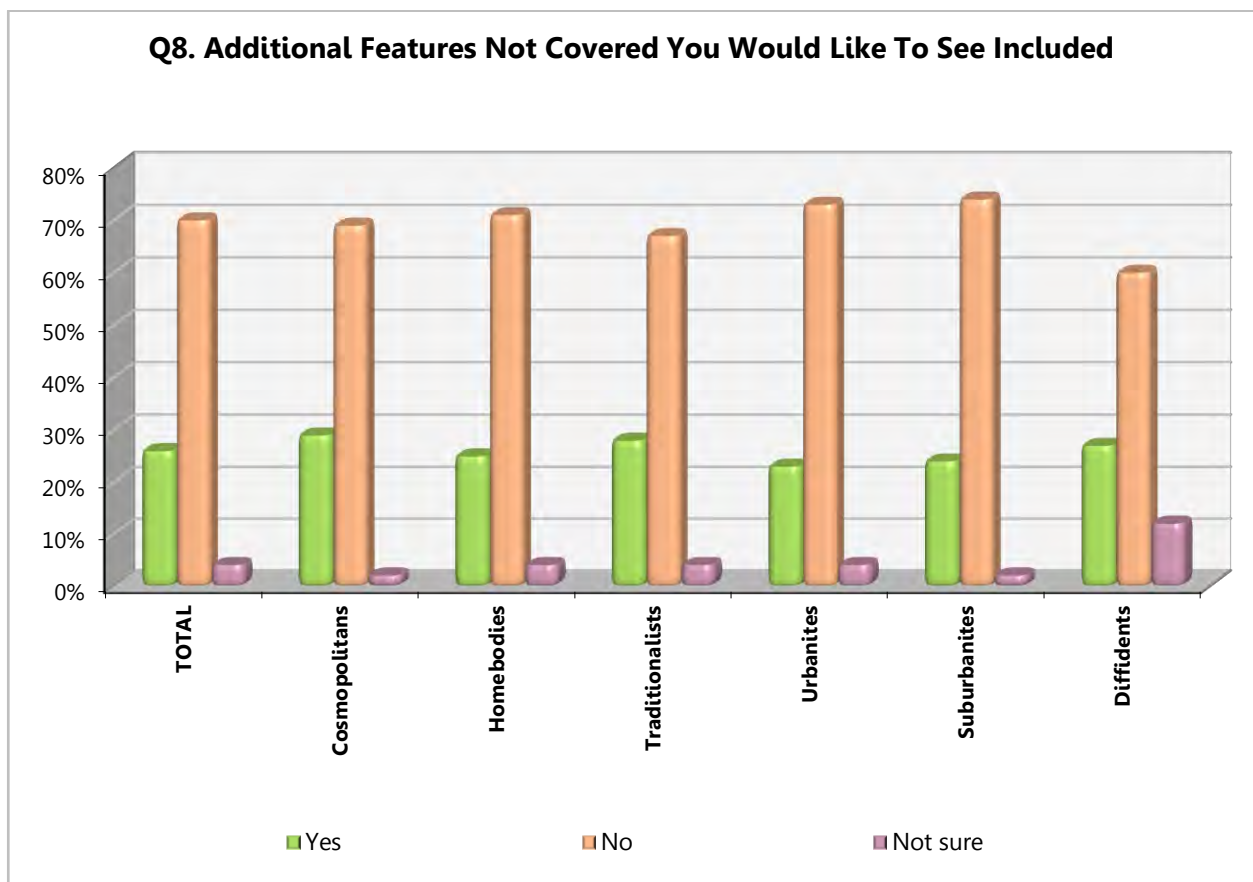
- Convenient for universities - 90% - importance 8%
- Access to interesting festivals & events - 89% - importance 5%
- Access to a range of entertainment options - 87% - importance 8%
- Convenient public transport - 87% - importance 26%
- Cafés & restaurants - 83% - importance 11%
- Medical facilities and services - 82% - importance 27%
- Public libraries - 80% - importance 9%

This shows that only two of the features (brand attributes) associated with the Adelaide CBD are rated as having importance by total respondents - convenient public transport and medical facilities and services.

4.5 Suburb Amenity – Additional Features

Question 8 - Are there any additional features not covered in the previous question that you would like to see included in an area you would choose to live in?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Yes	26%	29%	25%	28%	23%	24%	27%
No	70%	69%	71%	67%	73%	74%	60%
Not sure	4%	2%	4%	4%	4%	2%	12%



When asked if there were any additional features respondents would like included in an area they would choose to live that were not covered in the previous question, the most popular feature was for it to be located near the beach (x42 responses). Affordable housing and animal friendly off-leash dog parks were also popular (x13 responses each).

Additional features nominated are listed in the table below along with frequency of mention.

Additional Features of Area Choose to Live				
Roads and streets (quality, lighting, underground, safety, quiet, parking, speeds)	Open space (parks, playgrounds, wild space, community gardens, dog spaces, bike and walking trails)	Community services (churches, community centres, aged care, schools) hospitals, public transport	Housing options (including more affordable, larger blocks)	Community (demographic mix, sense of community, disability accessible)
38	35	34	20	19
Services (shopping, restaurants/ hotels, gyms, vet)	Look and Feel (heritage protection, architecture, quality of built environment)	Fast, reliable internet	Close proximity to family, services, other locations	Police and emergency services
14	13	10	9	9

4.6 Life Stage and Suburb Perceptions

Question 9 - Some areas of Adelaide tend to be associated with people who are at different stages in their lives, for instance young singles or retirees. Thinking about the same areas we have just been looking at, which of these do you think would be attractive for the following types of people?

The following household types were read out to the survey respondents who were then asked to tell the interviewer which areas would be attractive to each household type:

- Families with teenagers
- First home buyers
- Older singles
- Older singles or couples who are still working but without kids at home
- Retirees
- Professionals
- Young families
- Young singles

The following table highlights the life stages associated with each area (place brand) by percentage statement association. This table has been sorted by Adelaide CBD. Scores of 60% or more are highlighted in yellow text with a blue background with scores of 20% or less being highlighted in green text on a yellow background.

	Adelaide CBD	North Adelaide	Bowden	Prospect	Norwood	Unley
Professionals	79%	74%	39%	44%	55%	62%
Young singles	71%	41%	44%	26%	37%	31%
Older singles or couples who are still working but without kids at home	62%	68%	43%	56%	60%	62%
Older singles	57%	62%	39%	41%	52%	56%
Retirees	32%	57%	31%	43%	52%	57%
Families with teenagers	29%	45%	48%	58%	59%	62%
First home buyers	20%	15%	48%	37%	30%	16%
Young families	18%	31%	45%	57%	44%	45%

When asked which segments of the market would find the Adelaide CBD an attractive place to live, the following life-stage segments were strongly associated (60% or higher) with the Adelaide CBD by all respondents:

- Professionals – 79% (shared by North Adelaide and Unley)
- Young singles – 71% (Adelaide clearly dominant)
- Older singles or couples who are still working but without kids at home – 62% (shared by North Adelaide, Norwood and Unley)

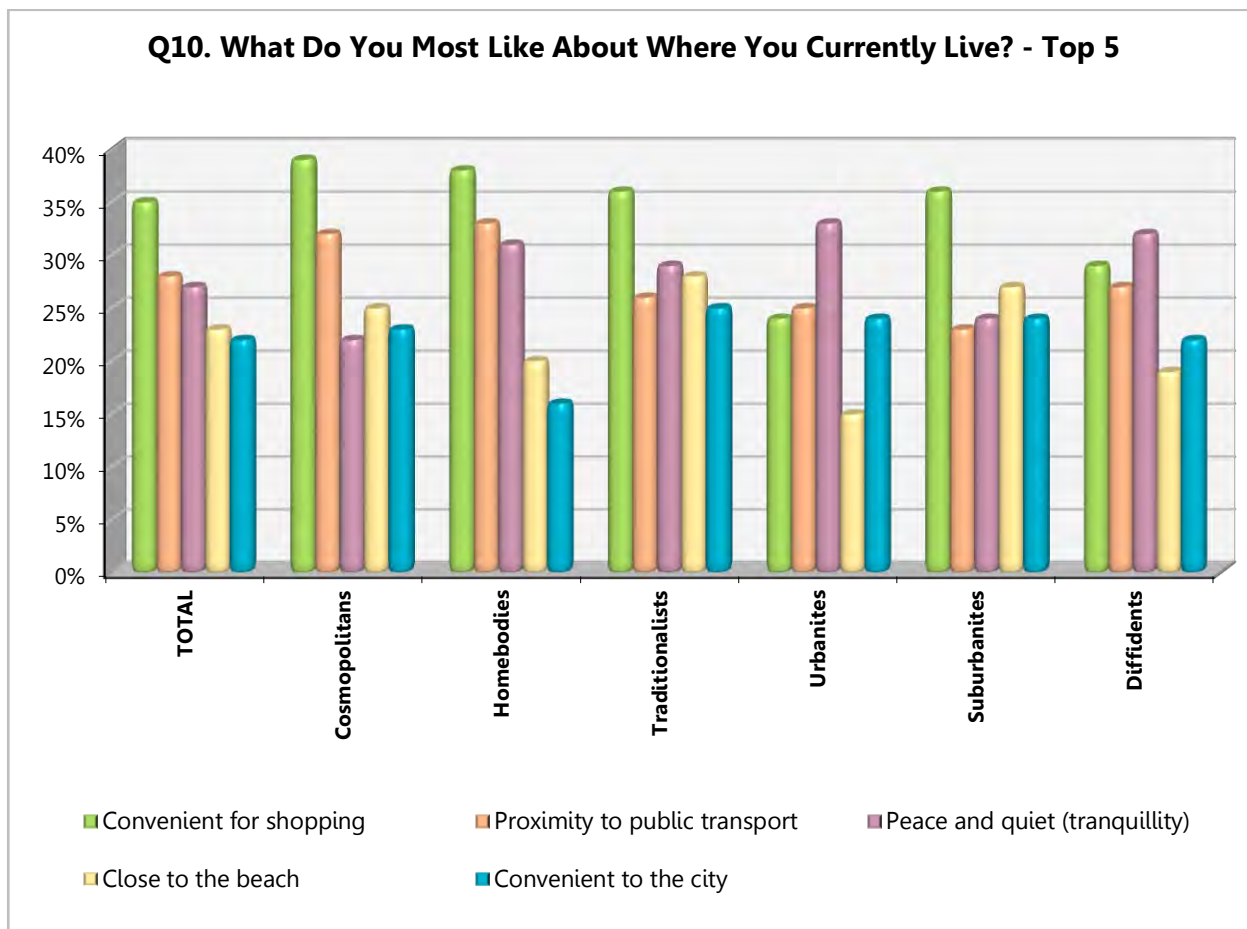
The Adelaide CBD is not perceived as an attractive place to live for first home buyers (Bowden and Prospect dominant) and young families (Prospect dominant).

4.7 Attitude to and Characteristics of Current Place of Residence

Question 10 – What do you most like about where you currently live?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Convenient for shopping	35%	39%	38%	36%	24%	36%	29%
Proximity to public transport	28%	32%	33%	26%	25%	23%	27%
Peace and quiet (tranquillity)	27%	22%	31%	29%	33%	24%	32%
Close to the beach	23%	25%	20%	28%	15%	27%	19%
Convenient to the city	22%	23%	16%	25%	24%	24%	22%
Close to parks	14%	20%	12%	16%	9%	17%	5%
Convenient for schools / kindergarten / childcare for my children	11%	13%	10%	16%	4%	12%	7%
It is a safe and secure place to live / a place where I feel safe	11%	12%	10%	17%	10%	9%	7%
Good neighbours / neighbourhood	10%	11%	7%	5%	14%	13%	9%
Trees	10%	14%	8%	11%	14%	7%	9%
Open space	9%	8%	8%	15%	7%	7%	10%
Close to medical facilities	8%	7%	10%	7%	9%	9%	7%
Close to work	7%	6%	6%	9%	3%	8%	9%
We have a big block with room to move	6%	6%	5%	9%	3%	8%	5%
Close to the hills	6%	6%	7%	8%	7%	7%	2%
Close to family	6%	5%	4%	8%	9%	9%	1%
Leafy streets	5%	6%	3%	6%	8%	6%	3%
Close to friends	5%	5%	2%	5%	9%	6%	5%
Close to restaurants or cafes	5%	8%	4%	4%	8%	5%	4%
Close to entertainment and recreation facilities	4%	4%	3%	5%	7%	3%	2%
My house	3%	2%	2%	4%	7%	4%	4%
This is the suburb that I grew up in	2%	1%	1%	3%	1%	3%	2%
Surrounded by attractive homes	1%	3%	0%	1%	1%	0%	1%
Close to where I study	1%	1%	1%	1%	1%	0%	1%
We have a small low maintenance block that suits our lifestyle	0%	0%	0%	0%	0%	1%	1%
Don't know	2%	3%	1%	1%	3%	3%	3%
Other	17%	19%	18%	18%	9%	18%	10%

When asked what they most like about where they currently live 'Convenient to shopping' was the most frequently nominated reason for total respondents (35%). 'Proximity to transport' (28%), 'Peace and quiet' (27%), 'Close to beach' (23%) and 'Convenient to the city' (22%) were also frequently nominated by total respondents.



Other reasons nominated by respondents for what they like most about where they live are detailed in the following table.

What Like Most About Where Live - Other				
Convenience and proximity to other places and services	Community (family friendly, neighbours, diversity, age friendly, character area)	Amenity (clean, crime free, proximity to city)	Affordable	Community Services (churches, library, cinema, public transport)
45	23	17	17	14
Walkable and Bikeable	Open Space (lakes, dog parks, golf course, native landscapes, sports facilities)	Housing (quality, character, density, garden, privacy)	Views	Roads and streets (width, functionality, parking)
13	13	13	11	10

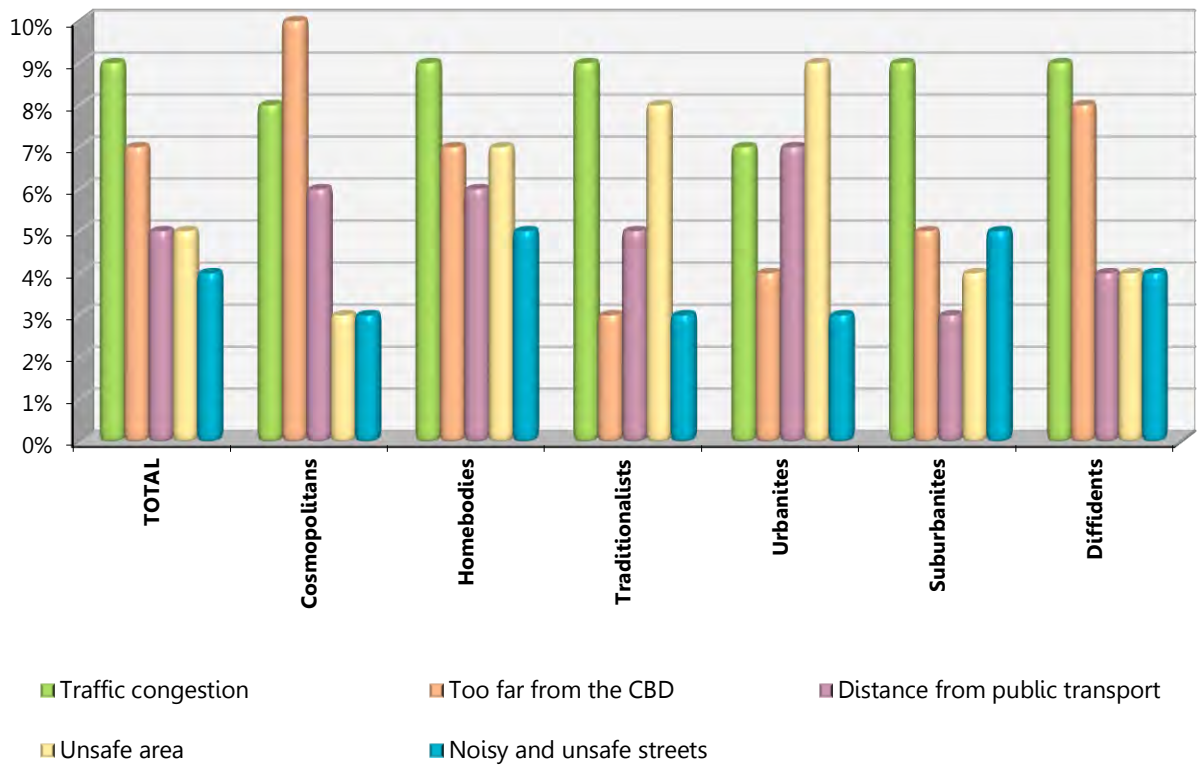
Question 11 – What do you least like about where you currently live?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	987	231	229	138	91	207	91
Traffic congestion	9%	8%	9%	9%	7%	9%	9%
Too far from the CBD	7%	10%	7%	3%	4%	5%	8%
Distance from public transport	5%	6%	6%	5%	7%	3%	4%
Unsafe area	5%	3%	7%	8%	9%	4%	4%
Noisy and unsafe streets	4%	3%	5%	3%	3%	5%	4%
Unpleasant neighbourhood	3%	3%	3%	1%	1%	1%	5%
Not convenient for shopping	2%	1%	2%	1%	2%	2%	4%
Too far away from work	2%	3%	1%	0%	2%	2%	0%
Surrounding homes are unattractive	2%	2%	4%	0%	0%	1%	2%
My house	1%	1%	0%	1%	1%	0%	0%
Not enough open space	1%	1%	0%	1%	0%	1%	3%
Too far from the beach	1%	1%	0%	1%	1%	0%	0%
Not enough trees	1%	1%	1%	1%	0%	1%	0%
Not close to family	1%	1%	0%	1%	0%	0%	0%
Not convenient for schools	1%	1%	0%	1%	0%	1%	0%
Not enough entertainment and recreation facilities nearby	1%	1%	1%	0%	2%	0%	0%
Not convenient for restaurants or cafes	1%	2%	1%	1%	1%	0%	2%
House and/or allotment too small	1%	1%	1%	1%	1%	2%	0%
Too far away from where I study	1%	1%	0%	0%	1%	0%	1%
Too far from the linear park	0%	0%	0%	0%	0%	0%	0%
Too far from the hills	0%	1%	0%	0%	0%	0%	0%
Too far from friends	0%	0%	0%	0%	1%	1%	0%
House and/or allotment too large	0%	1%	0%	0%	0%	0%	1%
Don't know	24%	22%	22%	22%	32%	25%	31%
Other	39%	39%	35%	47%	32%	43%	32%

When asked what they least like about where they currently live 'Traffic congestion' was the most frequently nominated reason for total respondents (9%). 'Too far from the CBD' (7%), 'Distance from public transport' and 'Unsafe area' (both 5%) were also nominated by total respondents.

Please refer to the chart on the following page.

Q11. What Do You Least Like About Where You Currently Live? - Top 5

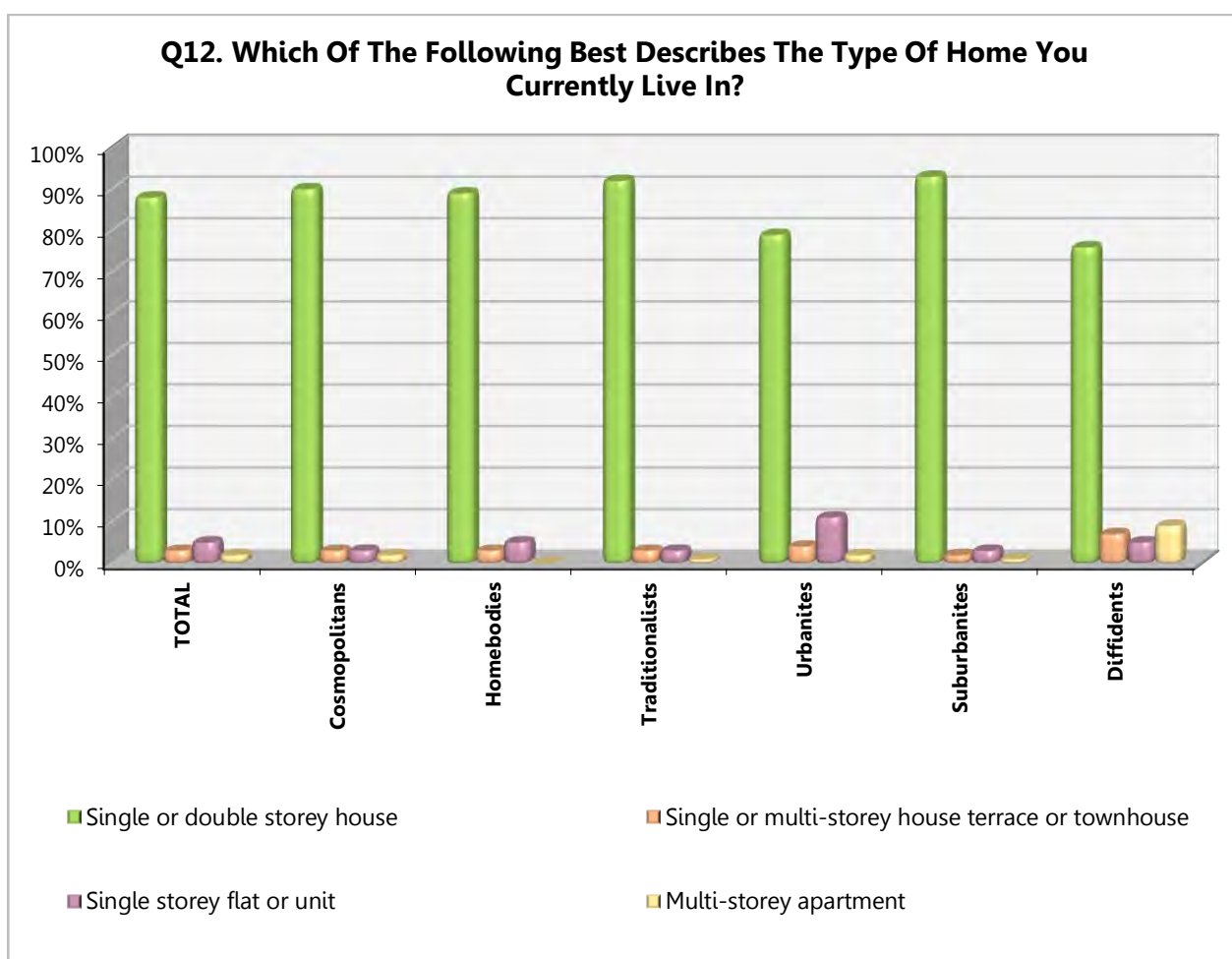


Other reasons nominated by respondents of what they like least about where they live are listed in the table below

What Like Least About Where Live – Other			
Noisy, dirty, polluted	Lack of community, don't like people in the area	Lack of services (public transport, schools, shopping, hotels, nightlife, too far away from amenities)	Development (subdivision of blocks, poor quality new housing, increased densities)
45	39	37	36
Infrastructure (no / poor internet, poorly designed / maintained roads / footpaths / streetscapes)	Expensive area (housing, rates, fees and charges)	Traffic, parking and bikeability (high traffic, too little parking, speeding, poor biking infrastructure)	Crime and safety issues
35	33	29	19
Quality of housing stock	Hilly	Poor green amenity (trees, open space, playgrounds)	
12	10	9	

Question 12 - Which of the following best describes the type of home you currently live in?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Single or double storey house	88%	90%	89%	92%	79%	93%	76%
Single or multi-storey house terrace or townhouse	3%	3%	3%	3%	4%	2%	7%
Single storey flat or unit	5%	3%	5%	3%	11%	3%	5%
Multi-storey apartment	2%	2%	0%	1%	2%	1%	9%
Other dwelling	2%	2%	1%	1%	3%	1%	1%
Not sure	1%	0%	1%	0%	0%	0%	2%

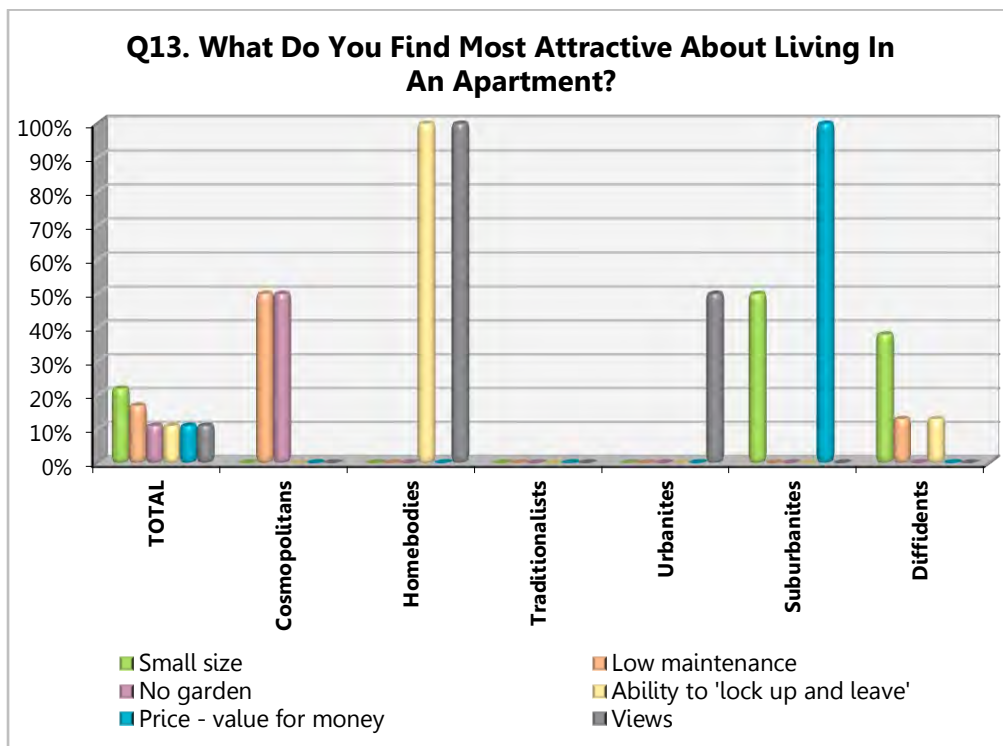


Over three quarters of total respondents (88%) stated they are currently living in a single or double storey house, increasing to 93% of the Suburbanites segment. The Urbanites segment is more likely to live in single storey flat/unit (11% compared to 5% of total respondents). Multi-storey apartments are more popular for the Diffidents segment (9% compared to 2% of total respondents).

4.8 Apartment Living Attitudes

Question 13 – For those who reported currently living in a multi-storey apartment in Q12, what do you find most attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution – small sample size)	18	4	1	1	2	2	8
Small size	22%	0%	0%	0%	0%	50%	38%
Low maintenance	17%	50%	0%	0%	0%	0%	13%
No garden	11%	50%	0%	0%	0%	0%	0%
Ability to 'lock up and leave'	11%	0%	100%	0%	0%	0%	13%
Price - value for money	11%	0%	0%	0%	0%	100%	0%
Views	11%	0%	100%	0%	50%	0%	0%
Nothing	28%	0%	0%	100%	50%	0%	38%
Other	11%	25%	0%	0%	0%	0%	13%

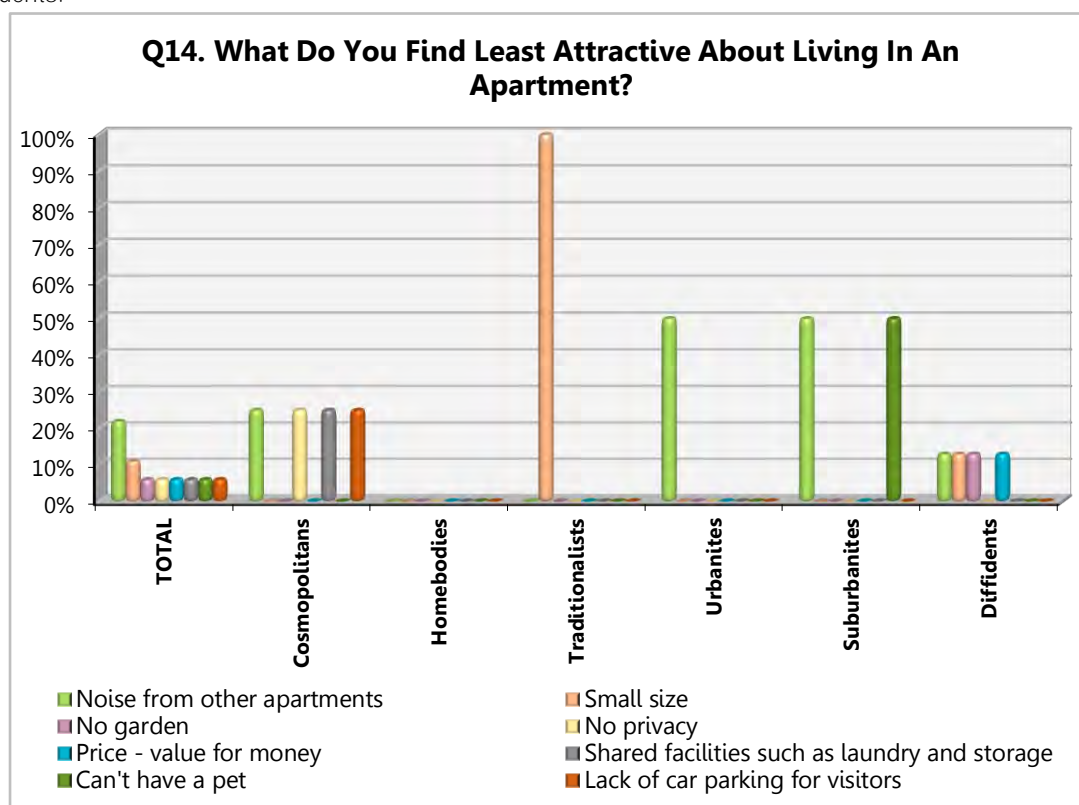


This question was asked of those respondents who indicated they live in a multi-storey apartment. Please note this is a very small sample size so caution should be exercised in interpreting the findings. The small size of the apartment was most attractive feature for 22% of these respondents, while the low maintenance required was most liked by 17% of respondents. Other factors include that it is a retirement apartment, and that the apartment is quiet.

Question 14 – For those who reported currently living in a multi-storey apartment in Q12, what do you find least attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	18	4	1	1	2	2	8
Noise from other apartments	22%	25%	0%	0%	50%	50%	13%
Small size	11%	0%	0%	100%	0%	0%	13%
No garden	6%	0%	0%	0%	0%	0%	13%
No privacy	6%	25%	0%	0%	0%	0%	0%
Price - value for money	6%	0%	0%	0%	0%	0%	13%
Shared facilities such as laundry and storage	6%	25%	0%	0%	0%	0%	0%
Can't have a pet	6%	0%	0%	0%	0%	50%	0%
Lack of car parking for visitors	6%	25%	0%	0%	0%	0%	0%
Nothing	33%	25%	0%	0%	50%	0%	50%
Other	11%	25%	100%	0%	0%	0%	0%

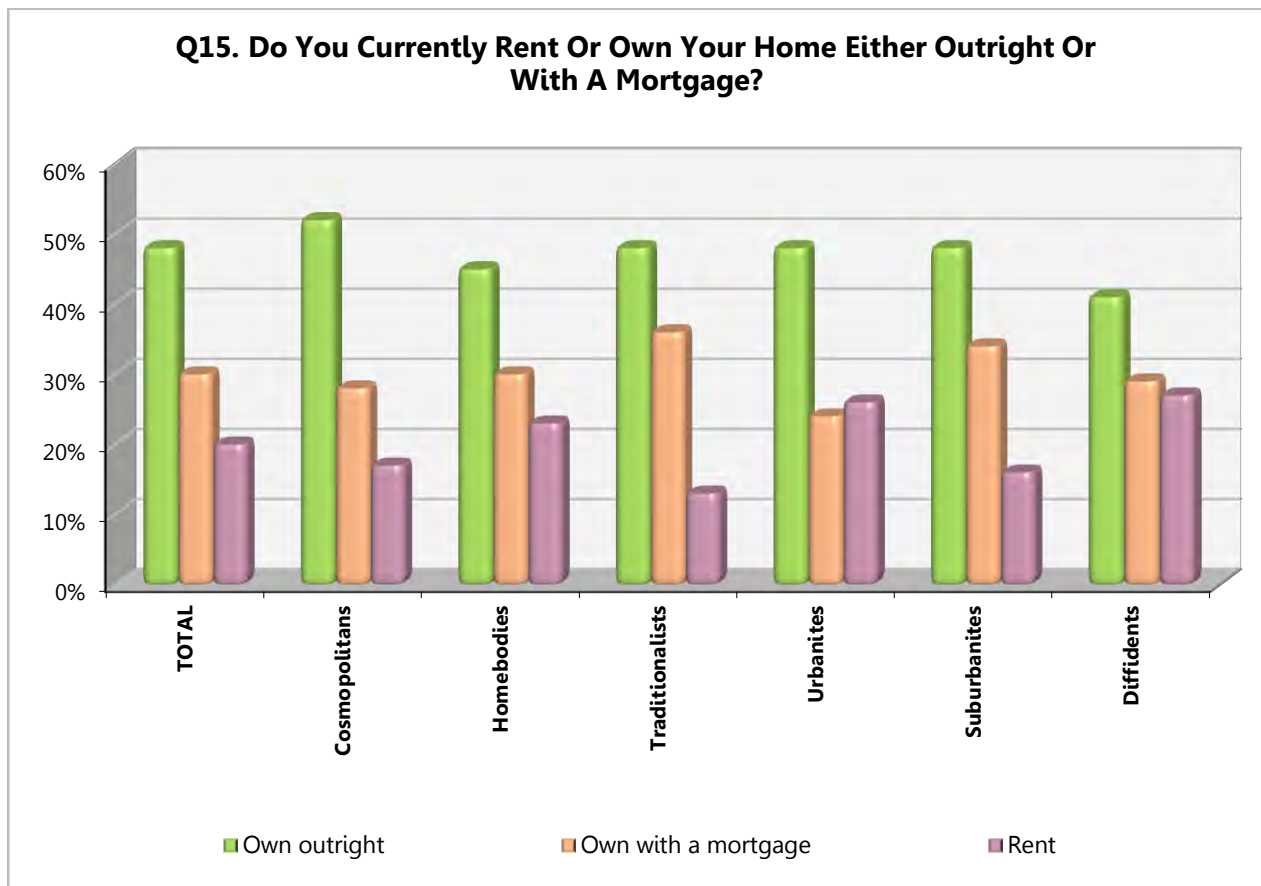
This question was asked of those respondents who indicated they lived in a multi-storey apartment. Please note this is a very small sample size so caution should be exercised in interpreting the findings. Those respondents who indicated they live in a multi-storey apartment in the previous question were asked what they found least attractive about living in an apartment. Noise from other apartments was least attractive feature for 22% of those respondents.



4.9 Current Residence - Tenure and Value

Question 15 - Do you currently rent or own your home either outright or with a mortgage?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Own outright	48%	52%	45%	48%	48%	48%	41%
Own with a mortgage	30%	28%	30%	36%	24%	34%	29%
Rent	20%	17%	23%	13%	26%	16%	27%
Other tenure type	2%	3%	2%	3%	1%	1%	3%



Nearly half of total respondents own their own home outright (48%). The Traditionalists are more likely to own their home with a mortgage (36% compared to 30% of total respondents) followed by the Suburbanites (34%) while the Diffidents and Urbanites segments are more likely to be renting (27% and 26% respectively compared to 20% of total respondents).

Question 16 - What would you estimate to be the value of your current home (interviewer to start at \$300,000)?

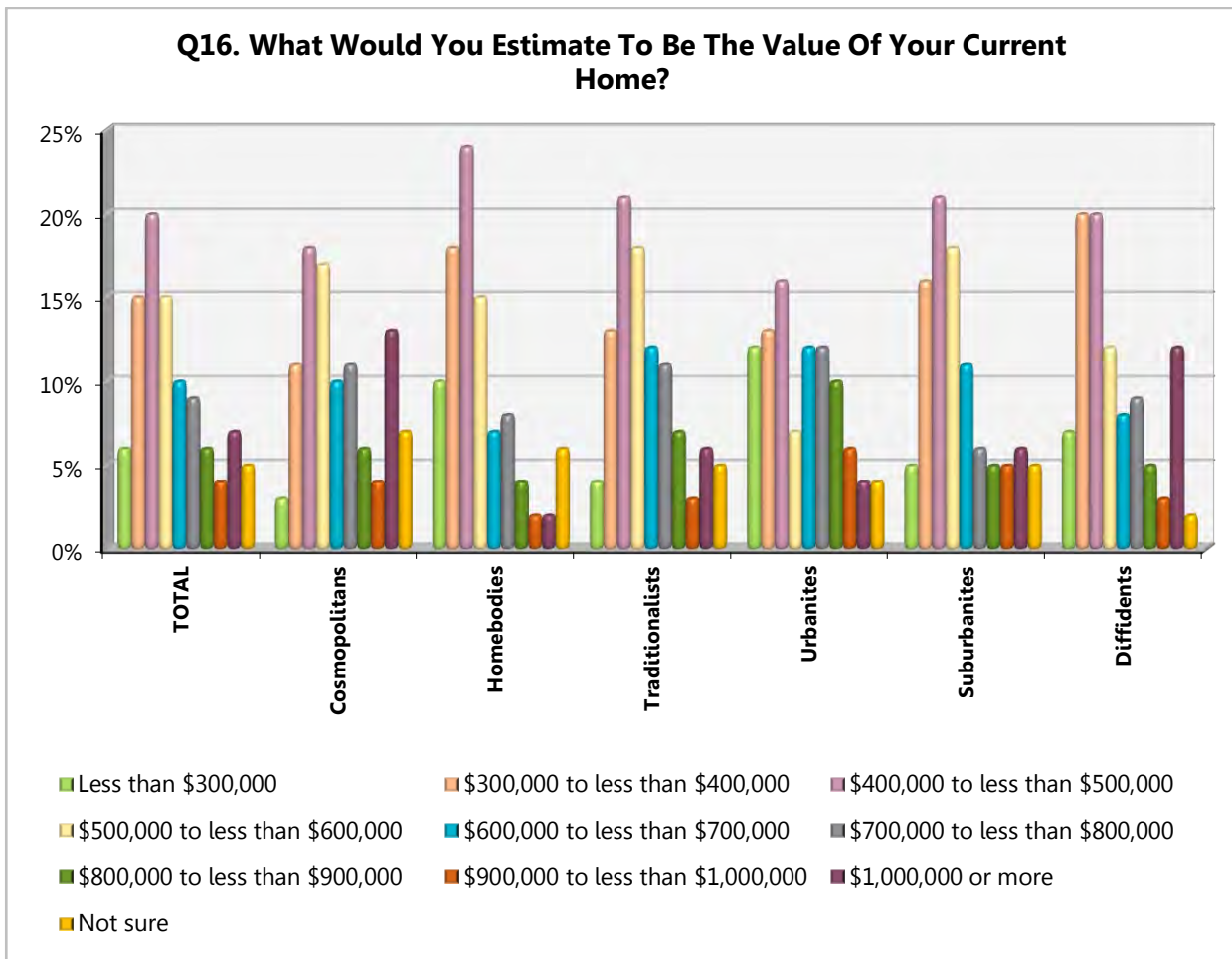
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	794	191	177	120	67	173	66
Less than \$100,000	0%	0%	0%	0%	3%	1%	0%
\$100,000 to less than \$200,000	2%	1%	3%	1%	3%	1%	2%
\$200,000 to less than \$300,000	4%	2%	7%	3%	6%	3%	5%
\$300,000 to less than \$400,000	15%	11%	18%	13%	13%	16%	20%
\$400,000 to less than \$500,000	20%	18%	24%	21%	16%	21%	20%
\$500,000 to less than \$600,000	15%	17%	15%	18%	7%	18%	12%
\$600,000 to less than \$700,000	10%	10%	7%	12%	12%	11%	8%
\$700,000 to less than \$800,000	9%	11%	8%	11%	12%	6%	9%
\$800,000 to less than \$900,000	6%	6%	4%	7%	10%	5%	5%
\$900,000 to less than \$1,000,000	4%	4%	2%	3%	6%	5%	3%
\$1,000,000 or more	7%	13%	2%	6%	4%	6%	12%
Not sure	5%	7%	6%	5%	4%	5%	2%
Do not own a home currently	3%	2%	4%	2%	1%	2%	5%

This question was asked of those respondents (80% of total respondents) who do not rent their property. Half of these respondents estimate the value of their current home between \$300,000 to \$600,000 (50%).

The Urbanites and Homebodies segments are more likely to value their current home the least of all segments (12% and 10% valued less than \$300,000 respectively compared to 6% of total respondents).

The Cosmopolitans and Diffidents segments are more likely to value their current home at more than \$1,000,000 (13% and 12% respectively compared to 7% of total respondents).

Please refer to the chart on the following page.

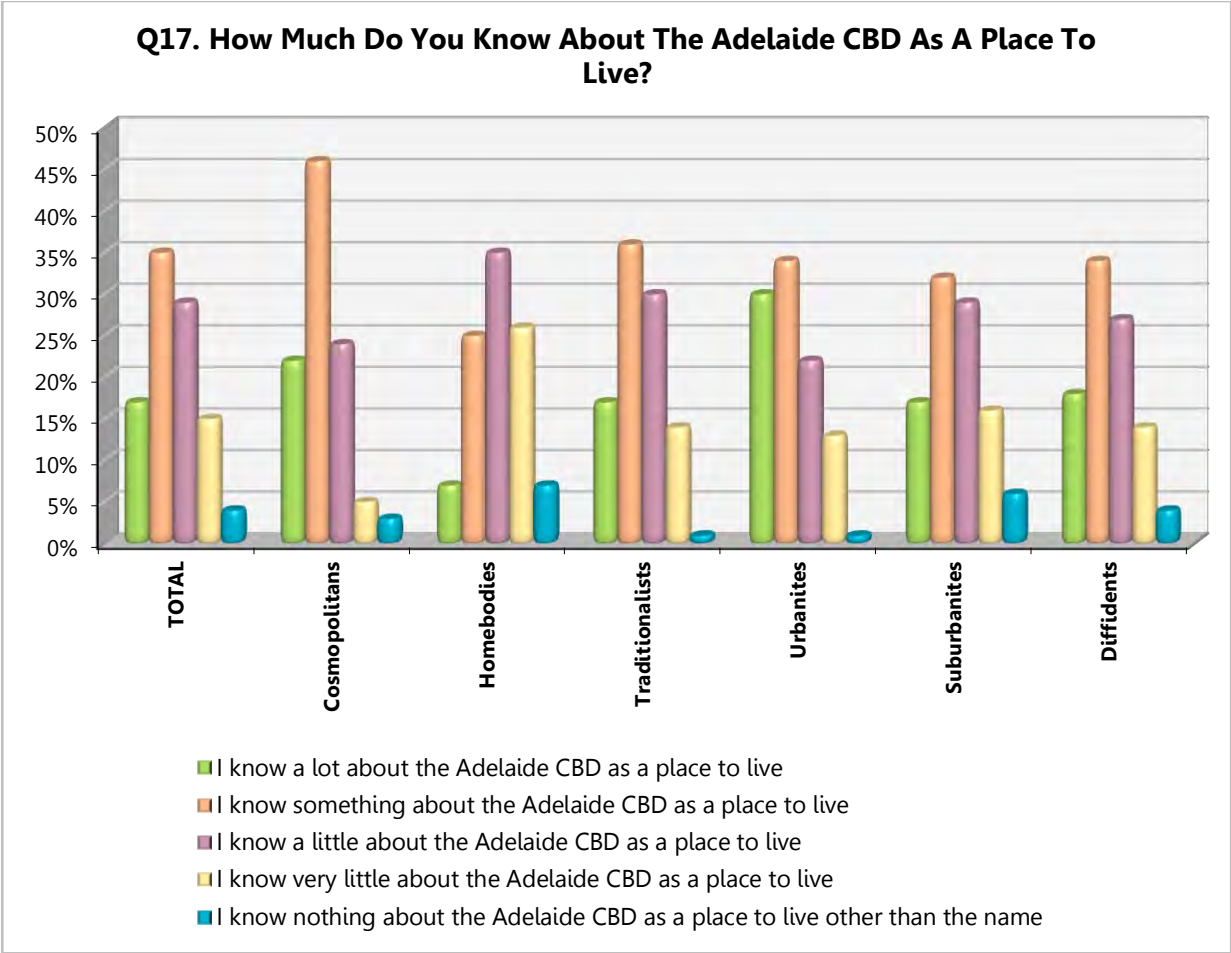


4.10 City Living – Knowledge, Perceptions and Incentives

Question 17 - Which of the following statements best describes how much you know about the Adelaide CBD as a place to live?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	987	231	229	138	91	207	91
I know a lot about the Adelaide CBD as a place to live	17%	22%	7%	17%	30%	17%	18%
I know something about the Adelaide CBD as a place to live	35%	46%	25%	36%	34%	32%	34%
I know a little about the Adelaide CBD as a place to live	29%	24%	35%	30%	22%	29%	27%
I know very little about the Adelaide CBD as a place to live	15%	5%	26%	14%	13%	16%	14%
I know nothing about the Adelaide CBD as a place to live other than the name	4%	3%	7%	1%	1%	6%	4%
This is the first I have heard of the Adelaide CBD as a place to live	0%	0%	0%	1%	0%	0%	2%

Over 80% of total respondents knew something about the Adelaide CBD as a place to live (81%). The Cosmopolitans segment is more aware than other segments, with 92% knowing at least a little about the Adelaide CBD as a place to live. The Homebodies segment is the least aware of the Adelaide CBD as a place to live (33% knowing very little or nothing, compared to 19% of total respondents).



Question 18 - In your view, which of the following statements describe the Adelaide CBD?

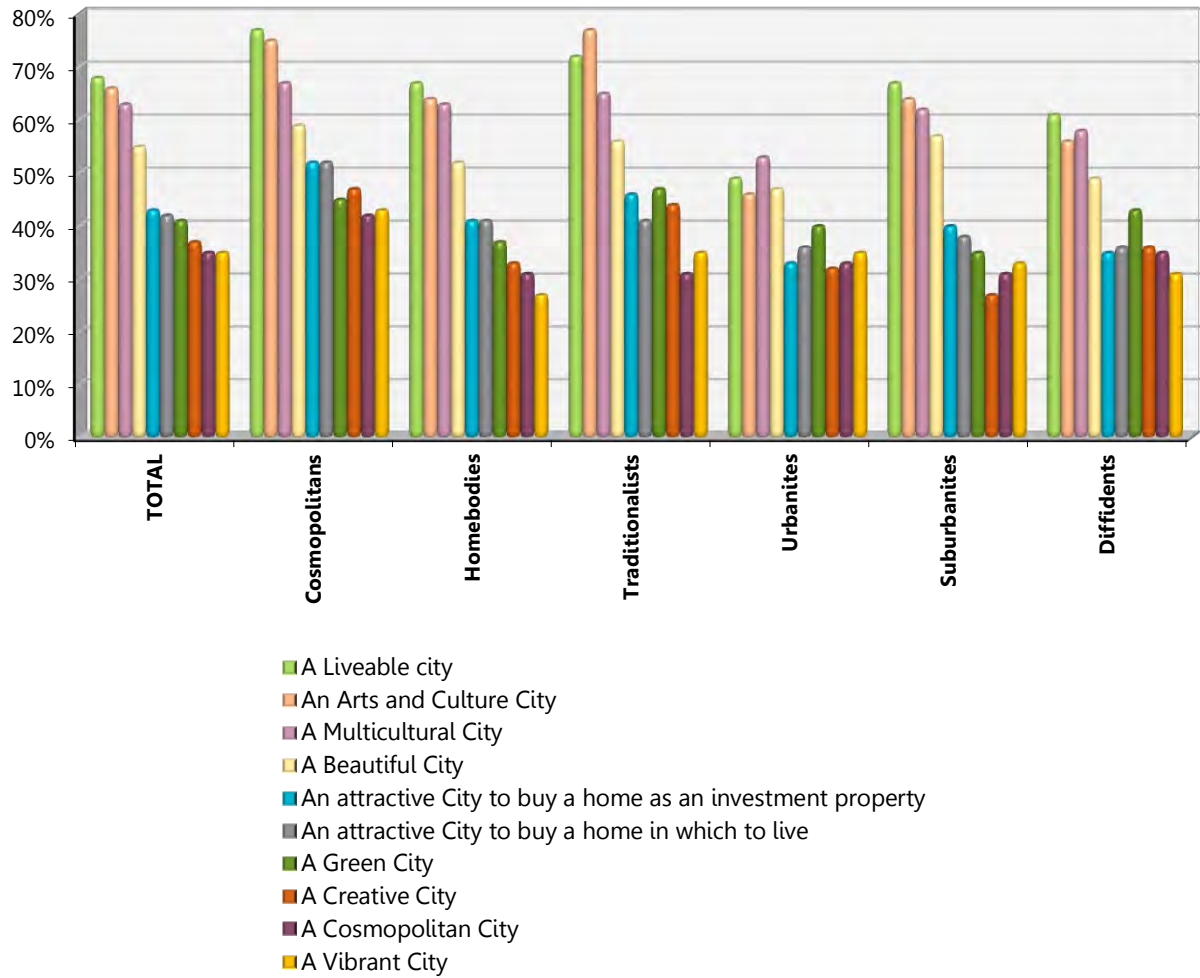
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	794	213	153	116	78	162	72
A Liveable City	68%	77%	67%	72%	49%	67%	61%
An Arts and Culture City	66%	75%	64%	77%	46%	64%	56%
A Multicultural City	63%	67%	63%	65%	53%	62%	58%
A Beautiful City	55%	59%	52%	56%	47%	57%	49%
An attractive City to buy a home as an investment property	43%	52%	41%	46%	33%	40%	35%
An attractive City to buy a home in which to live	42%	52%	41%	41%	36%	38%	36%
A Green City	41%	45%	37%	47%	40%	35%	43%
A Creative City	37%	47%	33%	44%	32%	27%	36%
A Cosmopolitan City	35%	42%	31%	31%	33%	31%	35%
A Vibrant City	35%	43%	27%	35%	35%	33%	31%
A City of Business	34%	36%	35%	36%	28%	33%	36%
An Environmentally Friendly City	32%	38%	23%	38%	28%	28%	33%
A Boutique City	30%	39%	25%	25%	28%	27%	32%
A Progressive City	28%	34%	24%	23%	27%	22%	38%
A Smart City	26%	31%	21%	25%	26%	24%	28%
An Innovative City	25%	30%	23%	22%	26%	22%	24%
An Entrepreneurial City	19%	22%	20%	17%	15%	17%	19%

This question was asked of those respondents (80%) who know at least a little bit about the Adelaide CBD as a place to live. **‘A Liveable City’ was the most popular statement** identified by these respondents when asked which statement best describes Adelaide (68%). **‘An Arts and Culture City’ and ‘Multicultural City’ were also frequently** nominated (66% and 63% of respondents). The Adelaide CBD was less likely to be described as **‘An Entrepreneurial City’, ‘An Innovative City’, ‘A Smart City’ or a ‘Progressive City’** by this group of respondents.

Two ‘attractiveness’ statements were included in this question, the first being **‘An attractive City to buy a home in which to live’** with 42% of this group of respondents stating this describes Adelaide increasing to 52% of the Cosmopolitans. A similar percentage (43%) claimed that Adelaide can be described as **‘An attractive City to buy a home as an investment property’** increasing to 52% of the Cosmopolitans.

Please refer to the chart on the following page.

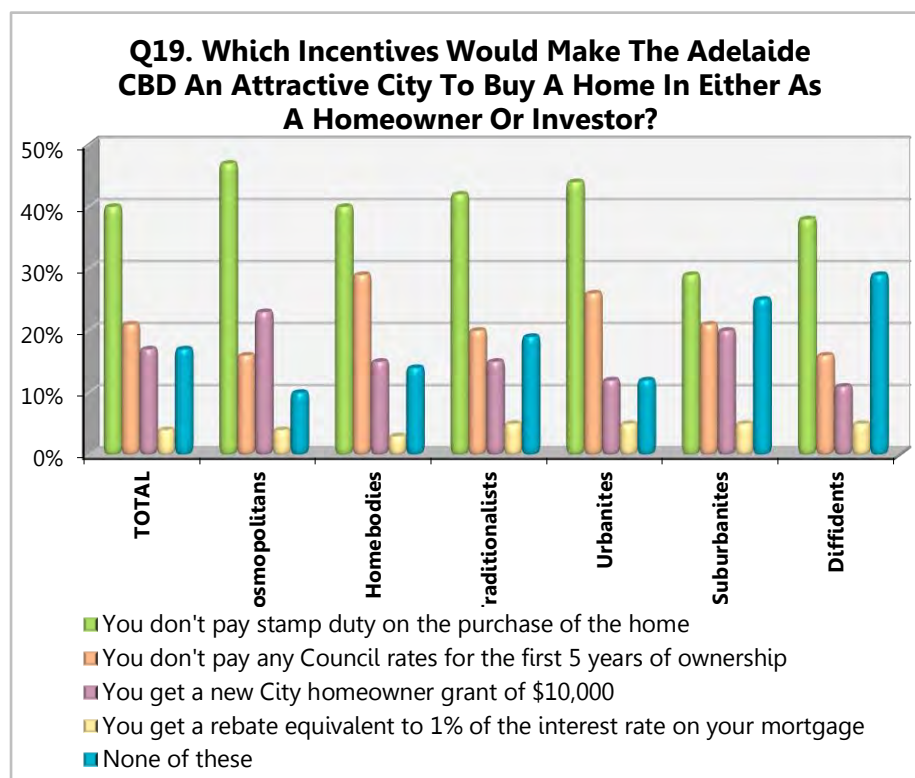
**Q18. Which Of The Following Statements Describe The Adelaide CBD?
- Top 10**



Question 19 - *If 'An attractive City to buy a home in as either option' is not selected then: Which if any of the following incentives would make the Adelaide CBD an attractive City to buy a home in either as a homeowner or investor?*

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	538	124	103	81	57	118	55
You don't pay stamp duty on the purchase of the home	40%	47%	40%	42%	44%	29%	38%
You don't pay any Council rates for the first 5 years of ownership	21%	16%	29%	20%	26%	21%	16%
You get a new City homeowner grant of \$10,000	17%	23%	15%	15%	12%	20%	11%
You get a rebate equivalent to 1% of the interest rate on your mortgage for the first year of ownership to a maximum of \$10,000	4%	4%	3%	5%	5%	5%	5%
None of these	17%	10%	14%	19%	12%	25%	29%

This question was asked of those respondents who did not select 'An attractive City to buy a home in either as a homeowner or investor' in the previous question (55% of total respondents). Not paying stamp duty on the purchase of the home would clearly be the most popular incentive to make the Adelaide CBD an attractive City to buy a home in either as a homeowner or investor for 40% of those respondents, increasing to 47% for the Cosmopolitans and 44% of the Urbanites.



4.11 Psychographic Segmentation

Question 20 - 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).

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

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

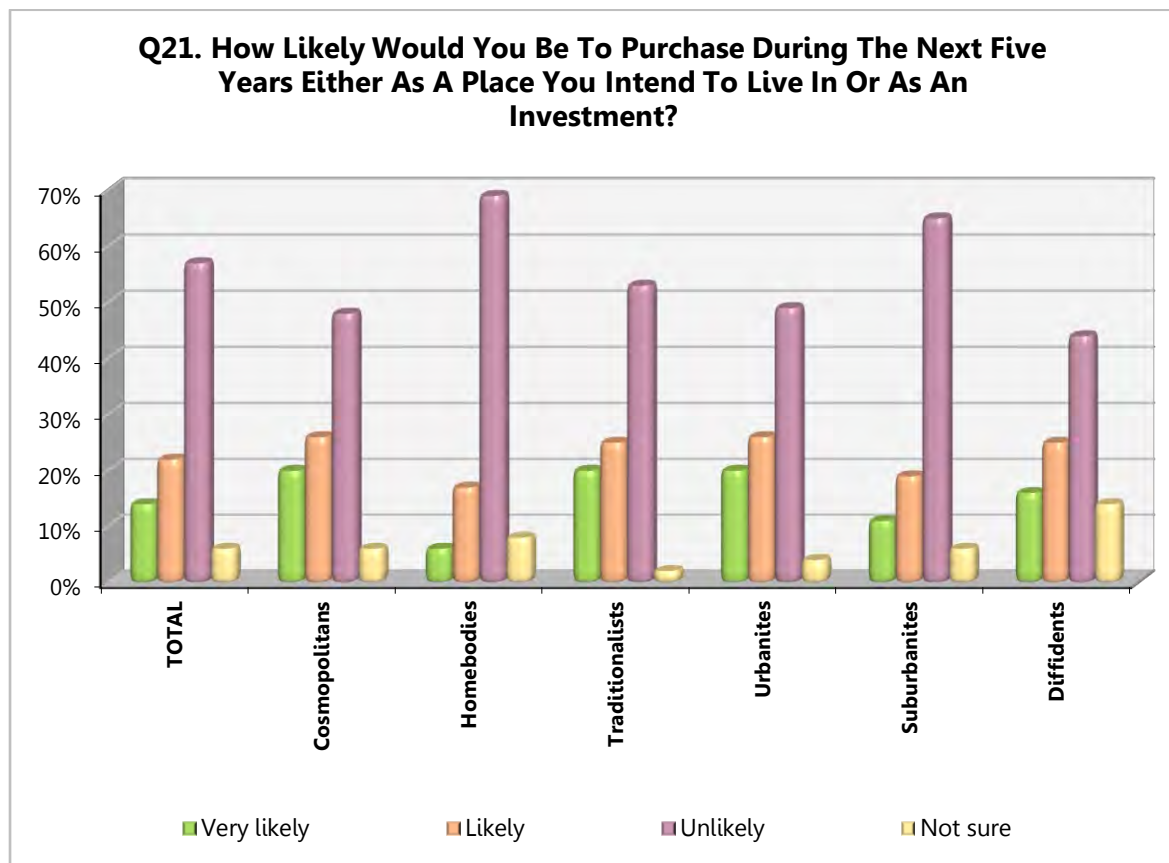
- I would prefer to live in an area where most of the people come from backgrounds that are similar to my own
- **Privacy is an important consideration for me when I'm choosing somewhere to live**
- Peace and quiet is an important consideration for me when I'm choosing somewhere to live
- A sense of community is an important consideration for me when I'm choosing somewhere to live
- I consider myself to be a cultured person
- I consider myself to be a well-educated person

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

4.12 Housing Purchase – Intentions, Budget and Features

Question 21 - How likely would you be to purchase a new home, which could be either a brand new home or an existing home, or land at some stage during the next five years either as a place you intend to live in or as an investment?

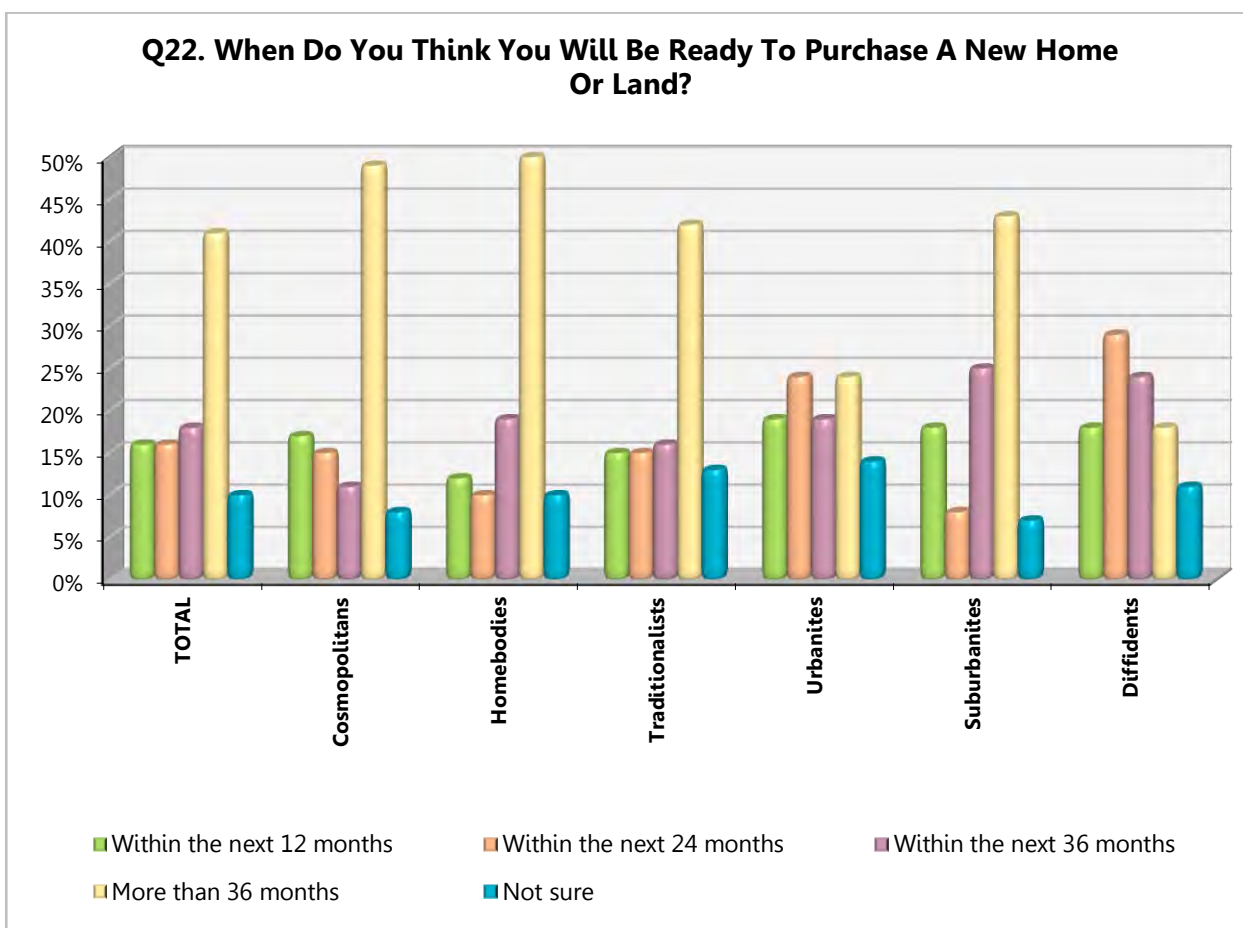
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Very likely	14%	20%	6%	20%	20%	11%	16%
Likely	22%	26%	17%	25%	26%	19%	25%
Unlikely	57%	48%	69%	53%	49%	65%	44%
Not sure	6%	6%	8%	2%	4%	6%	14%



Over a third of total respondents are likely to purchase a property in the next five years (36%) increasing to 46% of the Cosmopolitans and Urbanites and 45% of the Traditionalists. The Homebodies are least likely to purchase a property in the next five years, with 69% of the segment unlikely to purchase (compared to 57% of total respondents).

Question 22 - When do you think you will be ready to purchase a new home or land?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
Within the next 12 months	16%	17%	12%	15%	19%	18%	18%
Within the next 24 months	16%	15%	10%	15%	24%	8%	29%
Within the next 36 months	18%	11%	19%	16%	19%	25%	24%
More than 36 months	41%	49%	50%	42%	24%	43%	18%
Not sure	10%	8%	10%	13%	14%	7%	11%



This question was asked of those respondents who would be likely to purchase a property in the next five years (36% of total respondents).

Of those respondents who indicated they would be likely to purchase a property in the next five years, half would be ready to purchase within the next three years (50%) increasing to 62% for the Homebodies and 71% of the Diffidents.

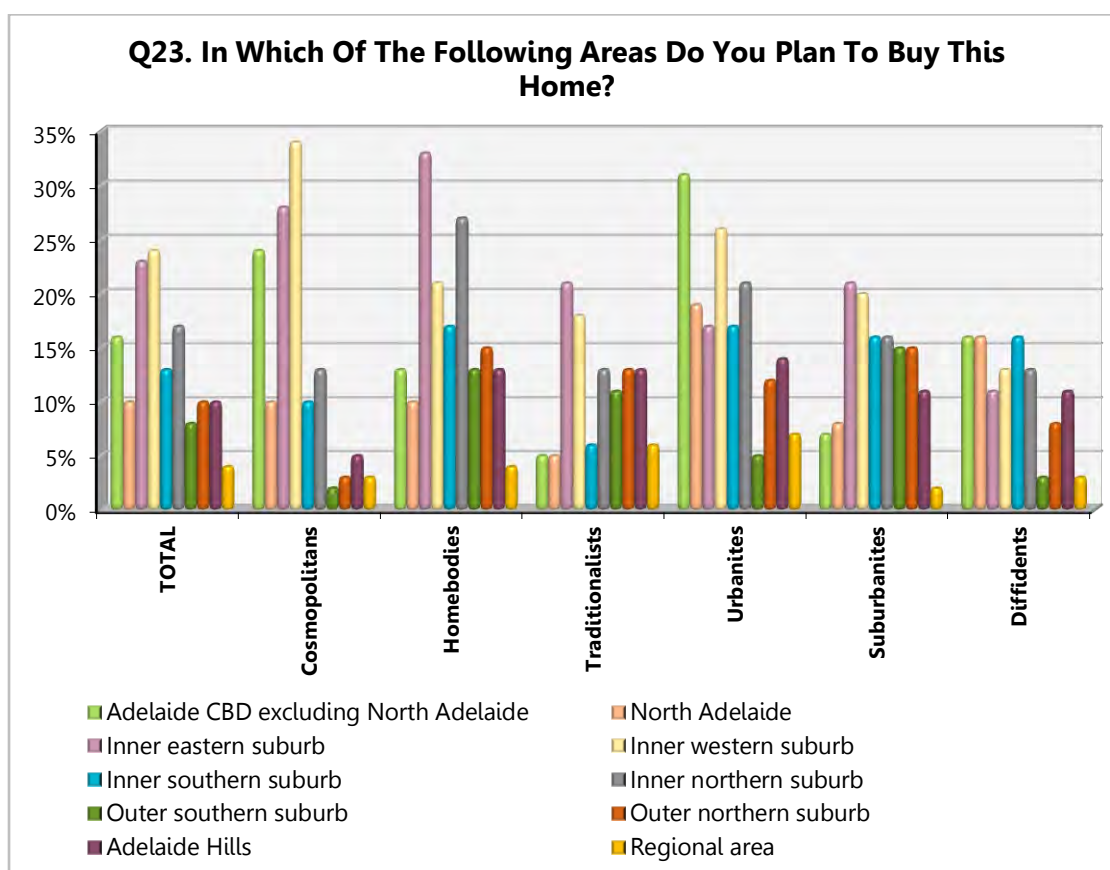
Question 23 - In which of the following areas do you plan to buy this home (interviewer to exclude land only purchases)?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
Adelaide CBD excluding North Adelaide	16%	24%	13%	5%	31%	7%	16%
North Adelaide	10%	10%	10%	5%	19%	8%	16%
Inner eastern suburb	23%	28%	33%	21%	17%	21%	11%
Inner western suburb	24%	34%	21%	18%	26%	20%	13%
Inner southern suburb	13%	10%	17%	6%	17%	16%	16%
Inner northern suburb	17%	13%	27%	13%	21%	16%	13%
Outer southern suburb	8%	2%	13%	11%	5%	15%	3%
Outer northern suburb	10%	3%	15%	13%	12%	15%	8%
Adelaide Hills	10%	5%	13%	13%	14%	11%	11%
Regional area	4%	3%	4%	6%	7%	2%	3%
Other	7%	6%	10%	13%	0%	5%	5%
Not sure	13%	17%	12%	15%	7%	10%	13%

This question was asked of those respondents who would be likely to purchase a property in the next five years (36% of total respondents).

Of those respondents who indicated they would be likely to purchase a property in the next five years, 16% indicated they plan to buy the property in the Adelaide CBD, increasing to 31% of the Urbanites and 24% of the Cosmopolitans. The Cosmopolitans also favour the inner eastern suburbs (28%) and the inner western suburbs (34%) while the Urbanites are more likely than any other segment to favour North Adelaide (19%). The Urbanites also favour the inner west (26%).

Please refer to the chart on the following page.



Question 24 - If Adelaide CBD is not one of the areas considered ask the following question: I notice you didn't choose Adelaide as one of the areas you would consider. What are your main reasons for this?

Those respondents who indicated they would be likely to purchase a property in the next five years, but did not choose Adelaide as one of the areas they would consider to buy a property, were asked what was their main reason for not selecting the CBD. Reasons provided by respondents include:

Main Reasons For Not Selecting CBD				
Don't want to live in CBD, want open natural, peaceful living environment, want to be close to the beach	Too expensive, cheaper options elsewhere, not affordable, not good value for money or investment option	Too busy, congested, noisy, cramped	All apartments, no other housing options, no back yards, sheds or gardens	Not good for families, young children or pets
65	63	45	34	25
Not close for work, family, friends, schools	No parking, traffic too heavy	Not safe, crime rate, no sense of community	Don't know enough about it (what sort of people live there, what the housing options are)	
13	10	9	9	

Question 25 - Which of the following options would best match your budget if you were to consider purchasing a new home including land (interviewer to start at \$300,000 and exclude land only purchases)?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
Less than \$100,000	1%	0%	2%	0%	2%	3%	3%
\$100,000 to less than \$200,000	3%	2%	4%	2%	7%	0%	8%
\$200,000 to less than \$300,000	9%	4%	8%	11%	12%	11%	11%
\$300,000 to less than \$400,000	21%	18%	31%	19%	19%	23%	21%
\$400,000 to less than \$500,000	19%	20%	17%	21%	19%	11%	26%
\$500,000 to less than \$600,000	16%	20%	10%	16%	7%	21%	13%
\$600,000 to less than \$700,000	8%	12%	6%	8%	5%	8%	3%
\$700,000 to less than \$800,000	6%	6%	4%	5%	10%	7%	3%
\$800,000 to less than \$900,000	3%	4%	0%	3%	5%	3%	3%
\$900,000 to less than \$1,000,000	1%	2%	0%	0%	2%	2%	3%
\$1,000,000 or more	3%	4%	0%	3%	2%	7%	3%
Not sure	9%	9%	19%	11%	10%	3%	5%
\$400,000 to less than \$800,000	49%	58%	37%	50%	41%	47%	45%

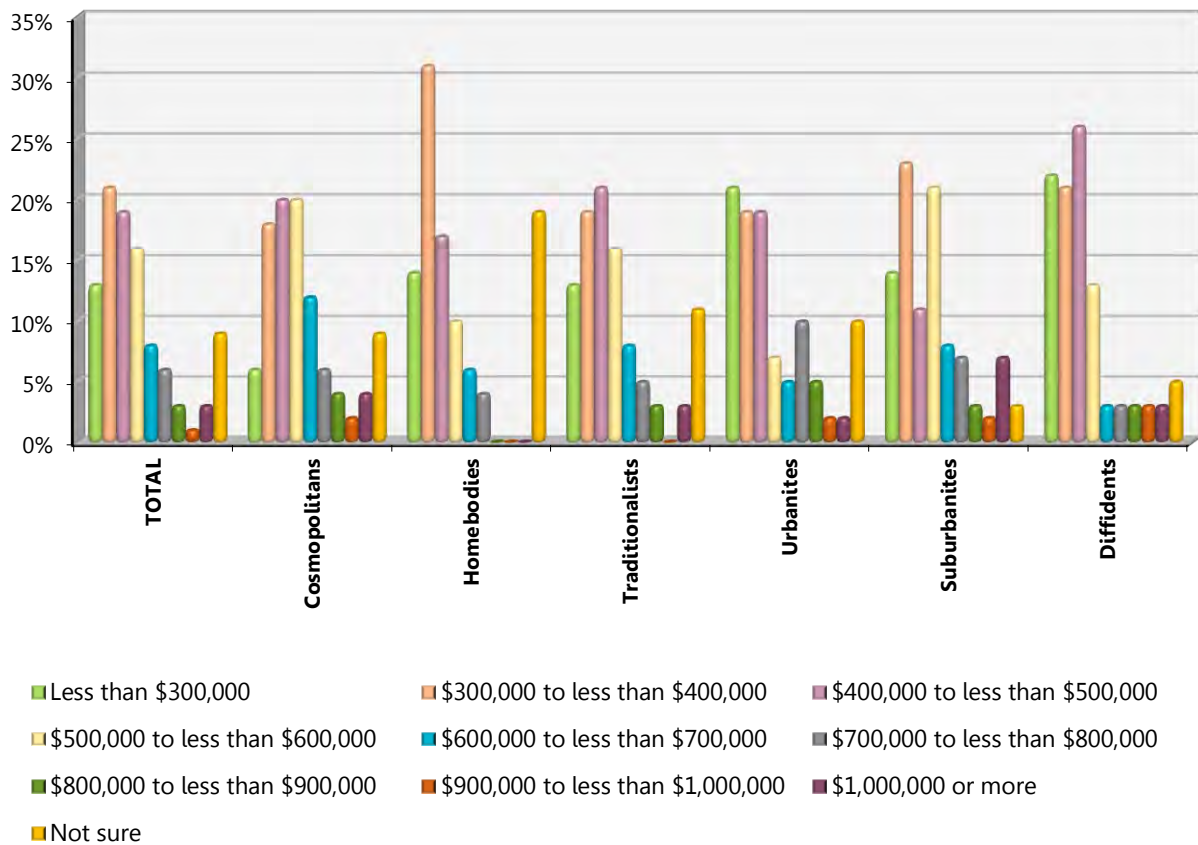
This question was asked of those respondents who would be likely to purchase a property in the next five years (36% of total respondents).

Over half of those respondents likely to purchase in the next five years stated their budget to purchase a home, including land, would be in the \$300,000 to \$599,000 price range (56%), increasing to 60% for the Diffidents segment. The Suburbanites segment is more likely to indicate a budget greater than \$800,000 (12% compared to 7% of total respondents) while 22% of the Diffidents segment would have a budget less than \$300,000 (compared to 13% of respondents).

Almost half (49%) of respondents in this group nominated a budget for a new home in the price band \$400,000 to less than \$800,000. This increases to 58% of the Cosmopolitans segment with the next largest percentage being the Traditionalists at 50%.

Please refer to the chart on the following page.

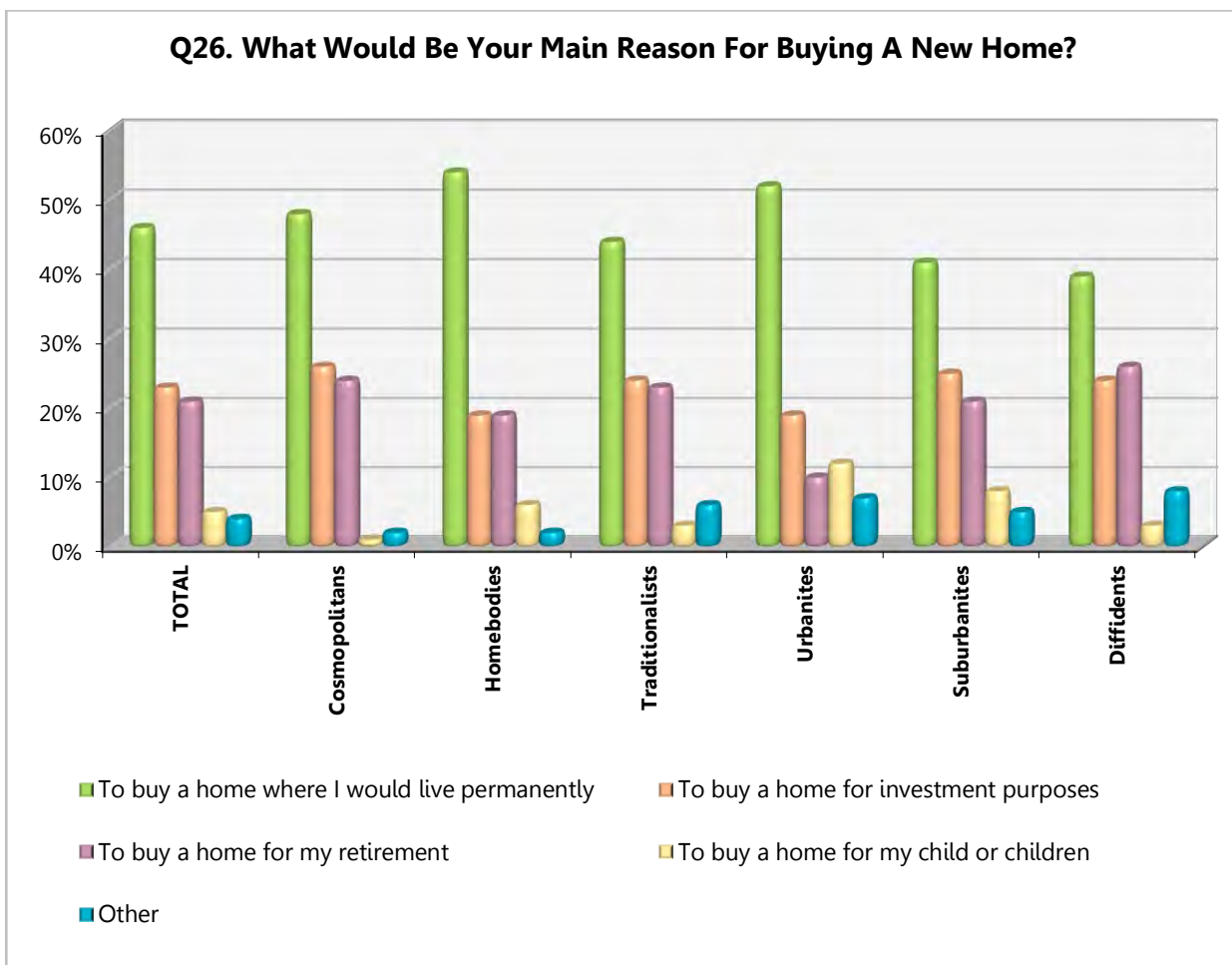
Q25. Budget For Purchasing A New Home Including Land



Question 26 - What would be your main reason for buying a new home?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	360	105	52	62	42	61	38
To buy a home where I would live permanently	46%	48%	54%	44%	52%	41%	39%
To buy a home for investment purposes	23%	26%	19%	24%	19%	25%	24%
To buy a home for my retirement	21%	24%	19%	23%	10%	21%	26%
To buy a home for my child or children	5%	1%	6%	3%	12%	8%	3%
Other	4%	2%	2%	6%	7%	5%	8%

Please refer to the chart on the following page.



This question was asked of those respondents who would be likely to purchase a property in the next five years (36% of total respondents).

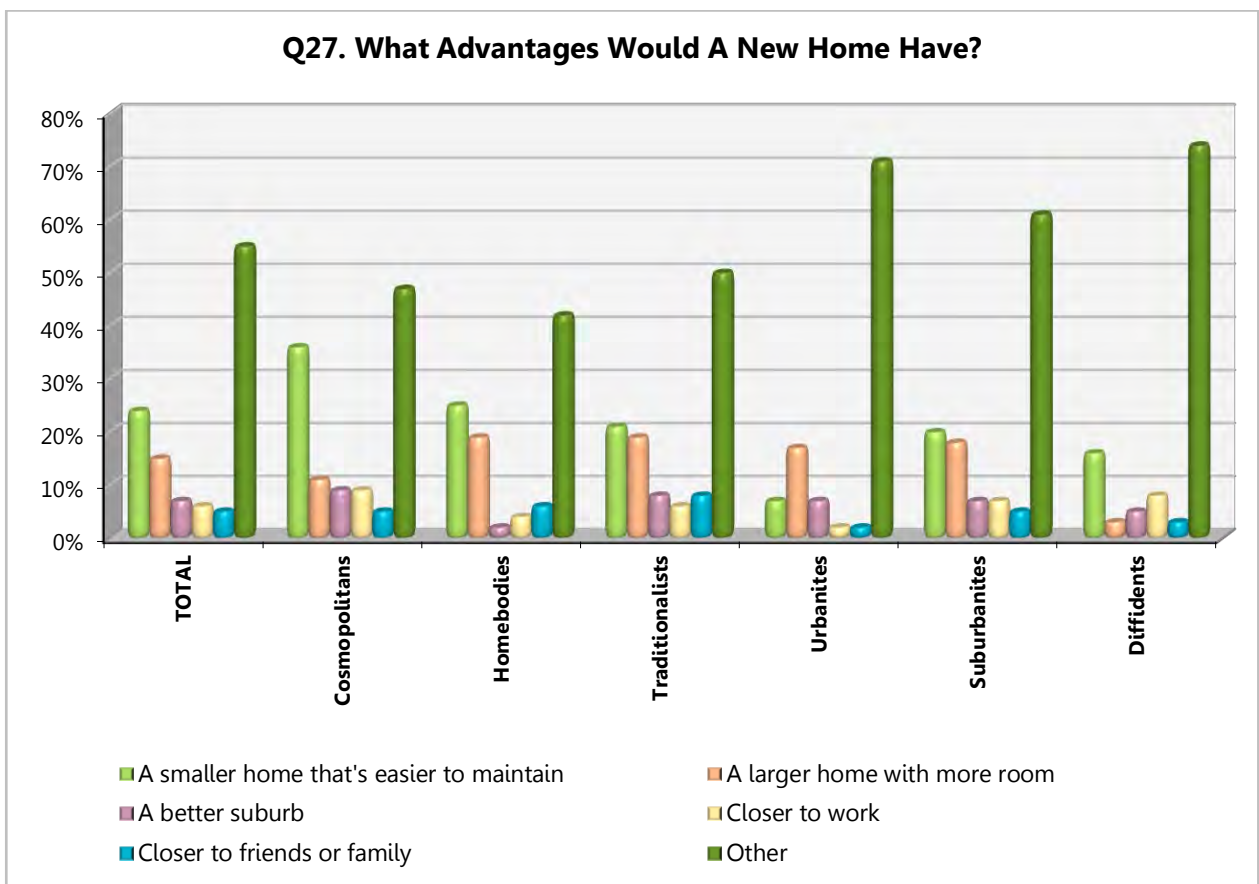
Nearly half of those respondents likely to purchase in the next five years would be purchasing a house where they would live permanently (46%), increasing to 54% for the Homebodies and 52% of the Urbanites. The Diffidants segment is more likely than the other segments to purchase for retirement (26% compared to 21% of total respondents) while 12% of the Urbanites segment would purchase a home for their child/ren (compared to 5% of total respondents).

Other reasons provided by respondents include:

- Downsize (x3)
- Holiday home (x2)
- A bigger house
- A change
- Annex to my son's house
- Better lifestyle
- Family
- Moving closer to family
- Permanent and rental
- Second home would be to live in and first home would be the investment
- To buy a home for my current phase of retirement
- To relocate to be close to family

Question 27 - And what advantages would this home have?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
A smaller home that's easier to maintain	24%	36%	25%	21%	7%	20%	16%
A larger home with more room	15%	11%	19%	19%	17%	18%	3%
A better suburb	7%	9%	2%	8%	7%	7%	5%
Closer to work	6%	9%	4%	6%	2%	7%	8%
Closer to friends or family	5%	5%	6%	8%	2%	5%	3%
Closer to school for kids	2%	1%	4%	2%	2%	3%	0%
Other	55%	47%	42%	50%	71%	61%	74%



This question was asked of those respondents who would be likely to purchase a property in the next five years (36% of total respondents). Nearly a quarter of those respondents likely to purchase in the next five years nominated that the property would be smaller and easier to maintain (24%) increasing to 36% of the Cosmopolitans, while 15% of respondents would be purchasing a larger property with more rooms.

Other reasons for purchasing a new property nominated by respondents include:

Other Reasons For Purchasing New Property				
Upgrading housing (downsizing, upsizing, bigger block, environmental features, newer, accessible)	Investment	Location (proximity to beach, city, family, services)	Moving from parents house or rental into own home	Change in lifestyle
47	40	22	21	8

Question 28 - 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)?

This question was asked of those respondents who would be likely to purchase a property in the next five years (36% of total respondents).

Over three-quarters of those respondents likely to purchase in the next five years indicated that they found a detached home on a block of land to be the most attractive option (45% very attractive and 35% attractive). The next most popular type of home was a townhouse/terrace house with 50% of respondents finding that an attractive option (12% very attractive and 38% attractive). Encouragingly 26% of these respondents claimed an apartment in a 3 to 4 building would be attractive, 20% an apartment in a 5 to 8 storey building, 17% an apartment in a 9 to 12 storey building and 16% in a building of more than 12 storeys.

	Very attractive	Attractive	Not sure	Not attractive
Detached home on a block of land	45%	35%	9%	11%
Townhouse or terrace house	12%	38%	11%	39%
Apartment in a 3 to 4 storey building	5%	21%	11%	63%
Apartment in a 5 to 8 storey building	4%	16%	11%	70%
Apartment in a 9 to 12 storey building	4%	13%	10%	73%
Apartment in a building of more than 12 storeys	4%	12%	9%	75%
Retirement unit	3%	13%	13%	71%
Other (specify)	9%	11%	79%	1%

Other home types nominated by respondents included:

- 3 or 4 bed home with a big yard for pets and kids
- A private place in the bush
- A traditional villa in a similar area
- Animal sanctuary, in the hills with a bit of land
- Any type of home that is a bargain
- Apartment in a 2 storey building
- Architectural designed homes
- Buy a block, knock the property down and build another two houses on it
- By the sea

- Cottage style detached home
- Country regional area
- Courtyard style homes
- Double storey detached
- Existing home with a large backyard
- Flat block
- Home where there are two together
- Homestead home
- Homette
- Large for 8 people
- Little place in the bush
- Pre-fab build, but not on a development
- Rundle Street apartments, interesting place in city, warehouse
- Single standalone dwelling
- Standard home
- Traditional renovated home
- Two storey

Question 29 - In the following questions I would like to ask you about some of the features you might like in your home?

This question was asked of those respondents who would be likely to purchase a property in the next five years. Respondents were asked which of the following features they would incorporate into the design if they were considering building their next home:

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

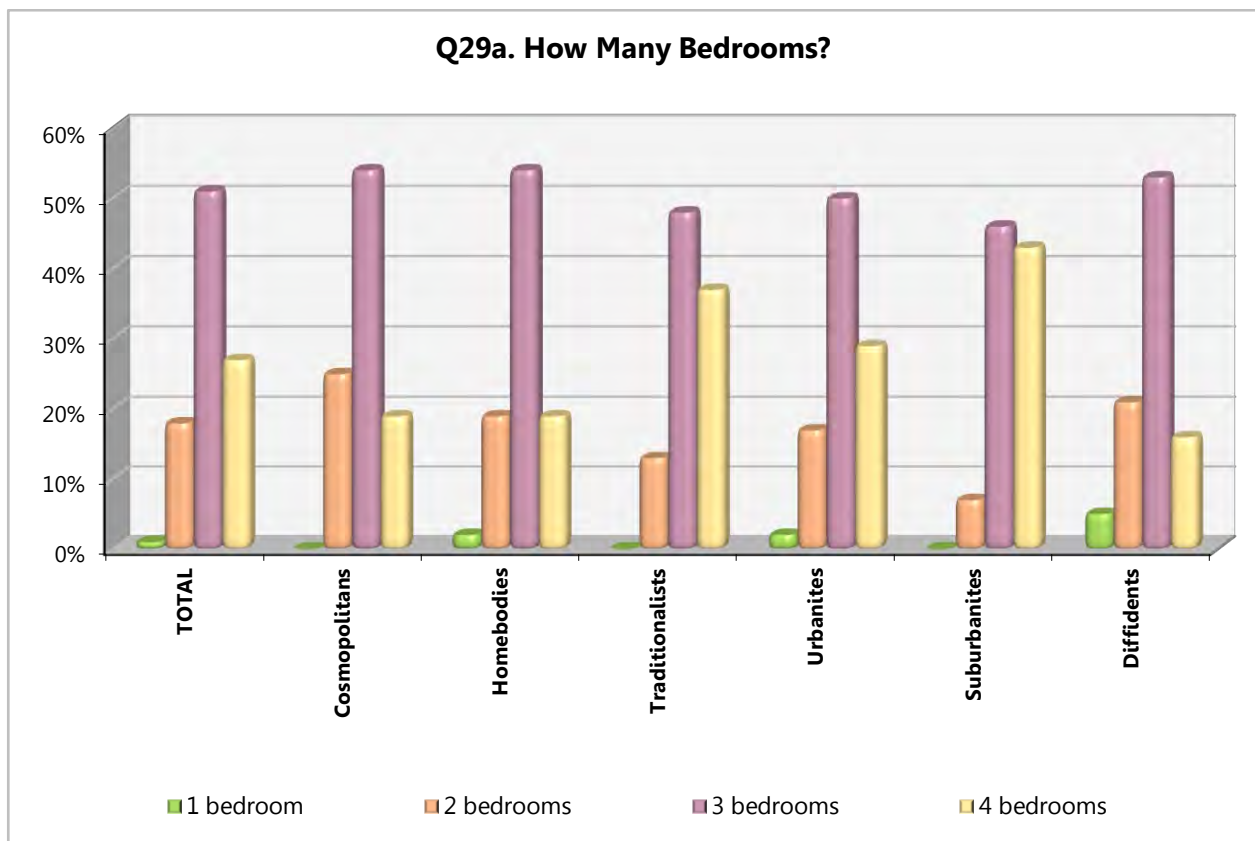
Key points to note regarding design features to be incorporated into a new house are as follows:

- Over half of those respondents who would be likely to purchase a property in the next five years would prefer three bedrooms (51%) increasing to 54% of the Cosmopolitans and Homebodies segments. The Suburbanites segment is more likely to prefer four bedrooms (43% compared to 27% of total respondents)
- Nearly three quarters of respondents would prefer two bathrooms (74%) increasing to 84% of the Suburbanites segment. The Homebodies are more likely to prefer one bathroom (27% compared to 19% of total respondents) reflecting their preference for houses with a smaller number of bedrooms
- Nearly two-thirds of respondents would prefer two living spaces (63%) increasing to 70% of the Suburbanites segment. Nearly half of the Urbanites are more likely to prefer one living space (43% compared to 31% of total respondents)
- Over two-thirds of respondents would prefer two car spaces (67%) increasing to 76% of the Traditionalists segment. The Diffidants are more likely to prefer a larger number of car spaces (19% for four or more car spaces compared to 8% of total respondents) while the Cosmopolitans and Homebodies segments are more likely to prefer one car space (21% each compared to 15% of total respondents)
- An outdoor entertainment area was favoured by nearly all of the total respondents (94%)

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

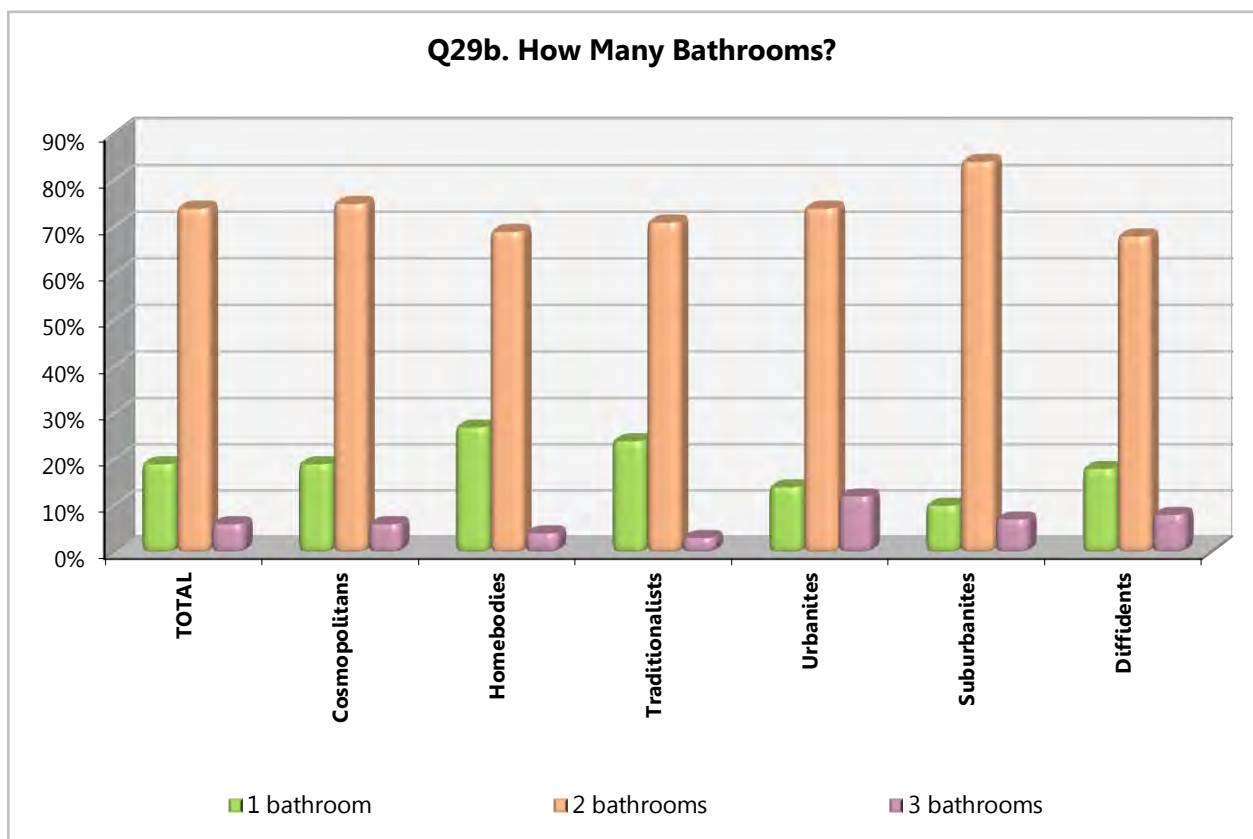
Question 29a – How many bedrooms would you like in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
1 bedroom	1%	0%	2%	0%	2%	0%	5%
2 bedrooms	18%	25%	19%	13%	17%	7%	21%
3 bedrooms	51%	54%	54%	48%	50%	46%	53%
4 bedrooms	27%	19%	19%	37%	29%	43%	16%
5 bedrooms	3%	2%	4%	2%	2%	3%	3%
6 or more bedrooms	1%	0%	2%	0%	0%	2%	3%



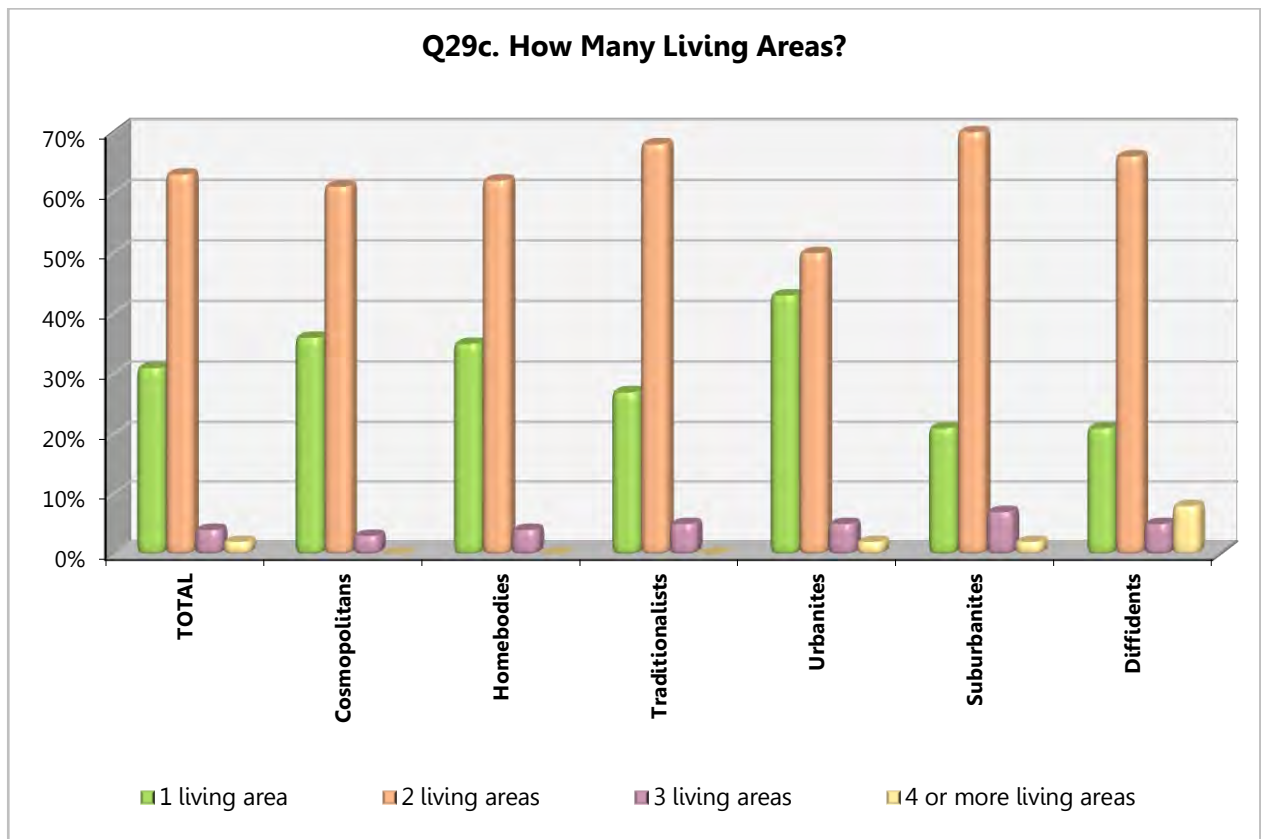
Question 29b – How many bathrooms would you like in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
1 bathroom	19%	19%	27%	24%	14%	10%	18%
2 bathrooms	74%	75%	69%	71%	74%	84%	68%
3 bathrooms	6%	6%	4%	3%	12%	7%	8%
4 bathrooms	1%	0%	0%	2%	0%	0%	3%
5 or more bathrooms	0%	0%	0%	0%	0%	0%	3%



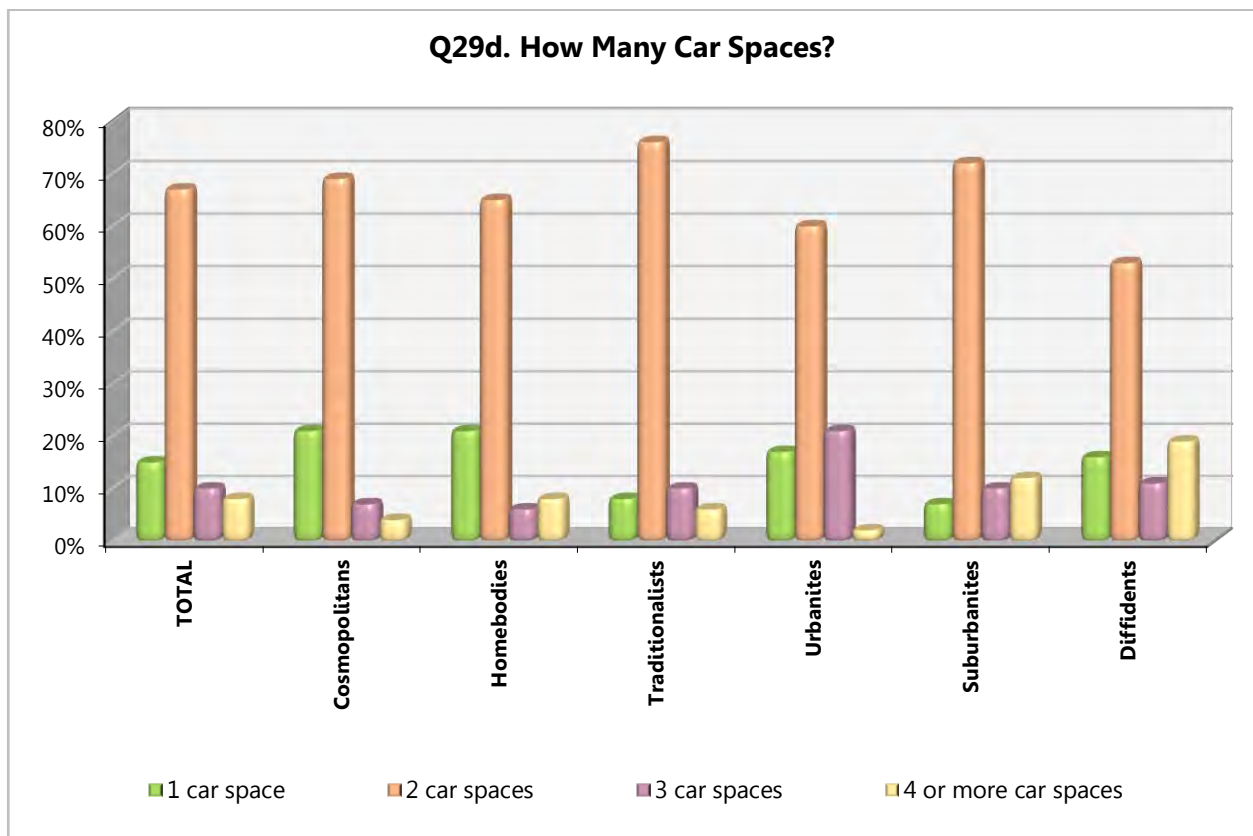
Question 29c – How many living areas would you like in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
1 living area	31%	36%	35%	27%	43%	21%	21%
2 living areas	63%	61%	62%	68%	50%	70%	66%
3 living areas	4%	3%	4%	5%	5%	7%	5%
4 living areas	1%	0%	0%	0%	0%	2%	3%
5 living areas	0%	0%	0%	0%	2%	0%	0%
6 or more living areas	1%	0%	0%	0%	0%	0%	5%



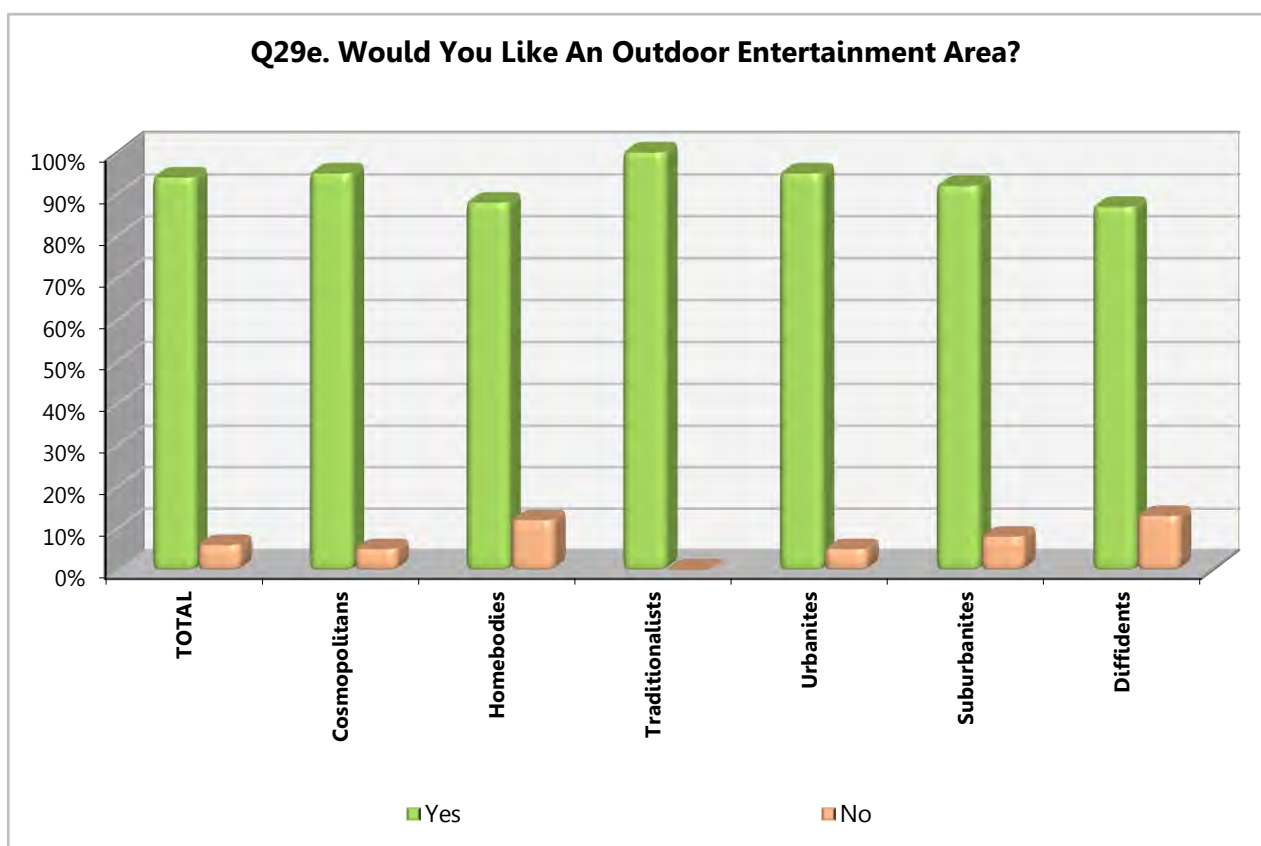
Question 29d – How many car spaces would you like in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
None	0%	0%	0%	0%	0%	0%	3%
1 car space	15%	21%	21%	8%	17%	7%	16%
2 car spaces	67%	69%	65%	76%	60%	72%	53%
3 car spaces	10%	7%	6%	10%	21%	10%	11%
4 car spaces	5%	3%	6%	6%	2%	5%	11%
5 or more car spaces	3%	1%	2%	0%	0%	7%	8%



Question 29e – Would you like an outdoor entertainment area in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
Yes	94%	95%	88%	100%	95%	92%	87%
No	6%	5%	12%	0%	5%	8%	13%



Question 30 - 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?

This question was asked of those respondents who would be likely to purchase a property in the next five years.

Respondents were asked which of the following options they would choose if they had a fixed amount of money to buy their next home:

- A large home on a smaller block of land or a small home on a larger block of land
- A home with parking for two cars or a home with parking for one car and easy access to good public transport
- A home on a larger block of land in the suburbs with a 30 minute drive to work or an apartment where you could walk to work

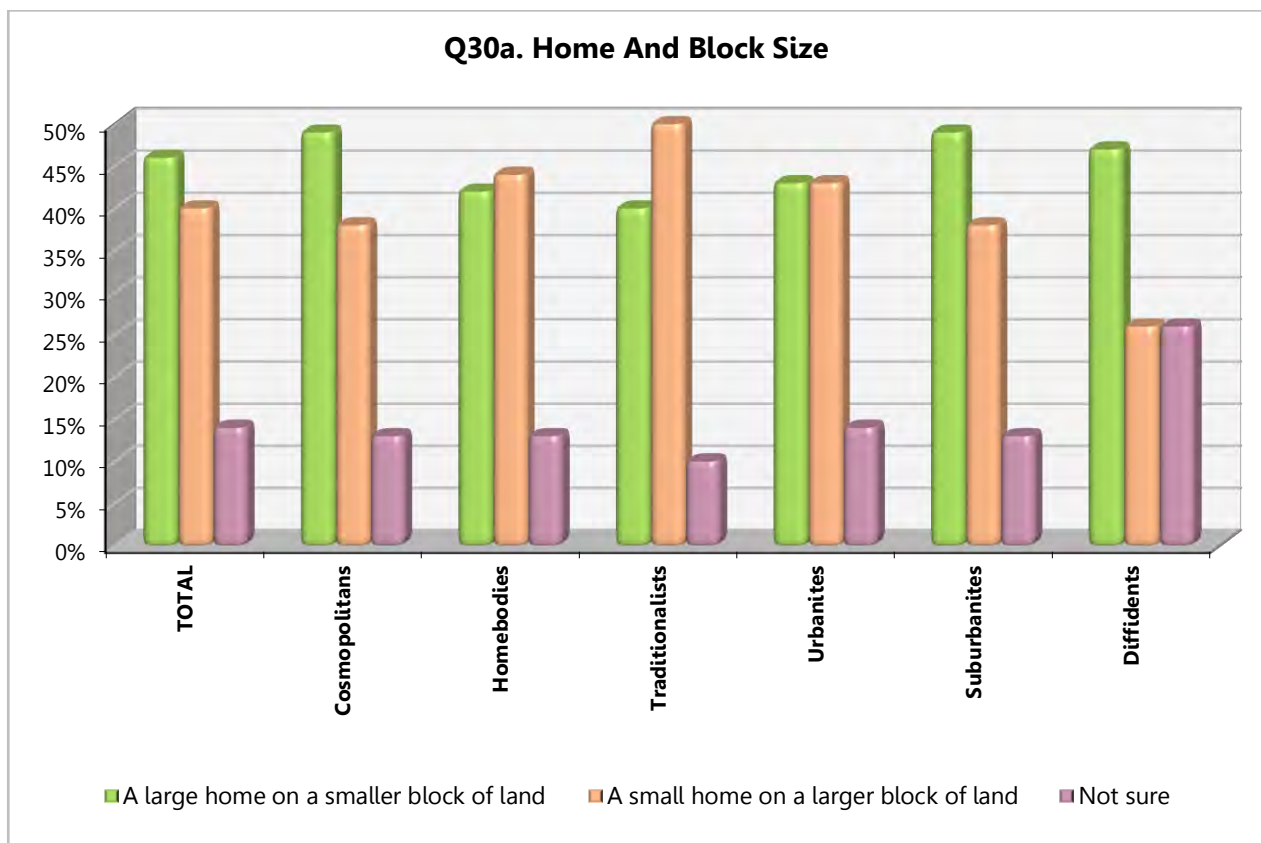
Key points to note regarding the above options are as follows:

- Nearly half of those respondents who would be likely to purchase a property in the next five years would choose a large home on a smaller block of land (46%) increasing to 49% of both the Cosmopolitan and Suburbanites segments. The Traditionalists segment is more likely to prefer a small home on a larger block of land (50% compared to 40% of total respondents)
- Nearly two-thirds of respondents would prefer a home with parking for two cars (64%) compared to parking for one car and easy access to good public transport, increasing to 79% of the Suburbanites segment. The Homebodies segment is more likely to prefer parking for one car and easy access to good public transport (40% compared to 32% of total respondents)
- Over half of respondents would prefer to live in a home on a larger block of land in the suburbs with a 30 minute drive to work (58%) increasing to 71% of the Homebodies segment. Nearly half of the Cosmopolitans segment would prefer to live in an apartment where they could walk to work (46% compared to 29% of total respondents)

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

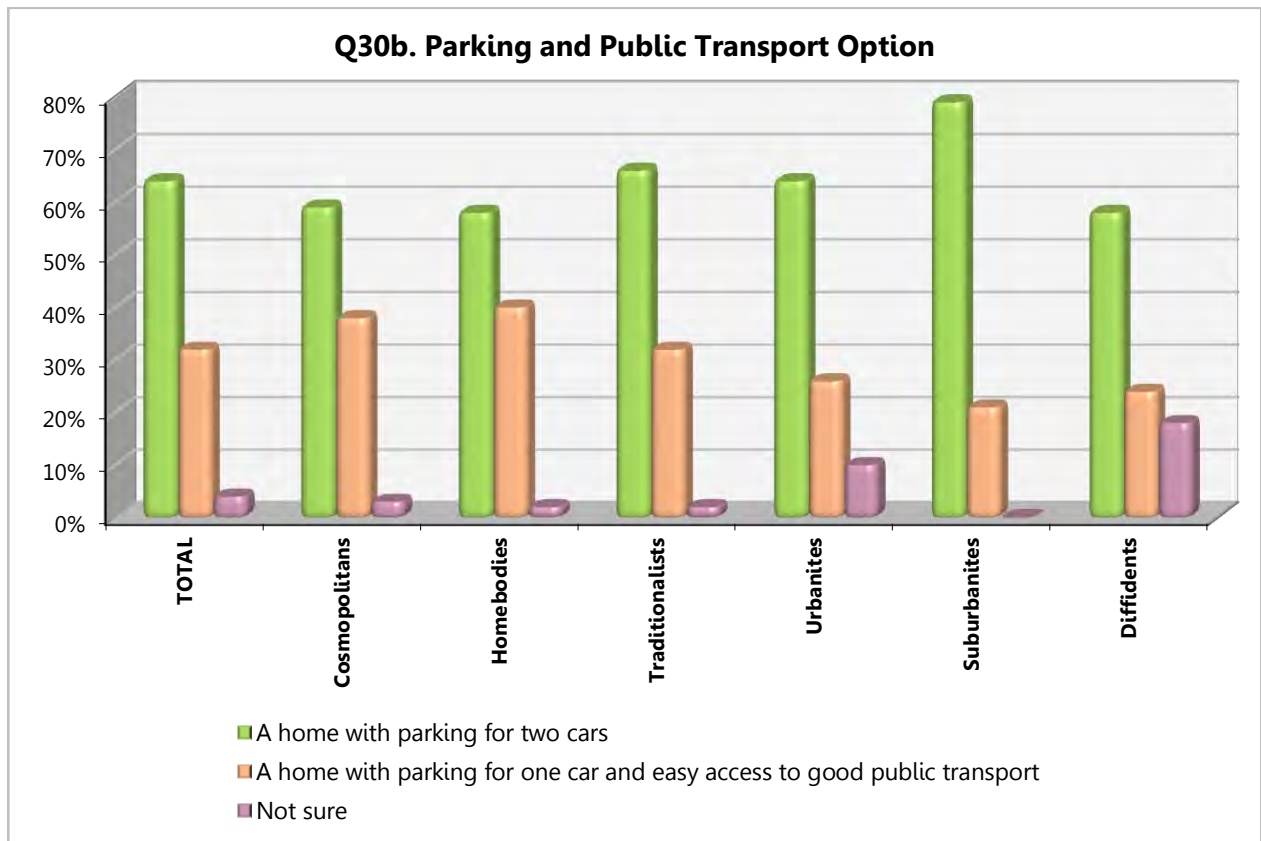
Question 30a – What home and block size would you prefer in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
A large home on a smaller block of land	46%	49%	42%	40%	43%	49%	47%
A small home on a larger block of land	40%	38%	44%	50%	43%	38%	26%
Not sure	14%	13%	13%	10%	14%	13%	26%



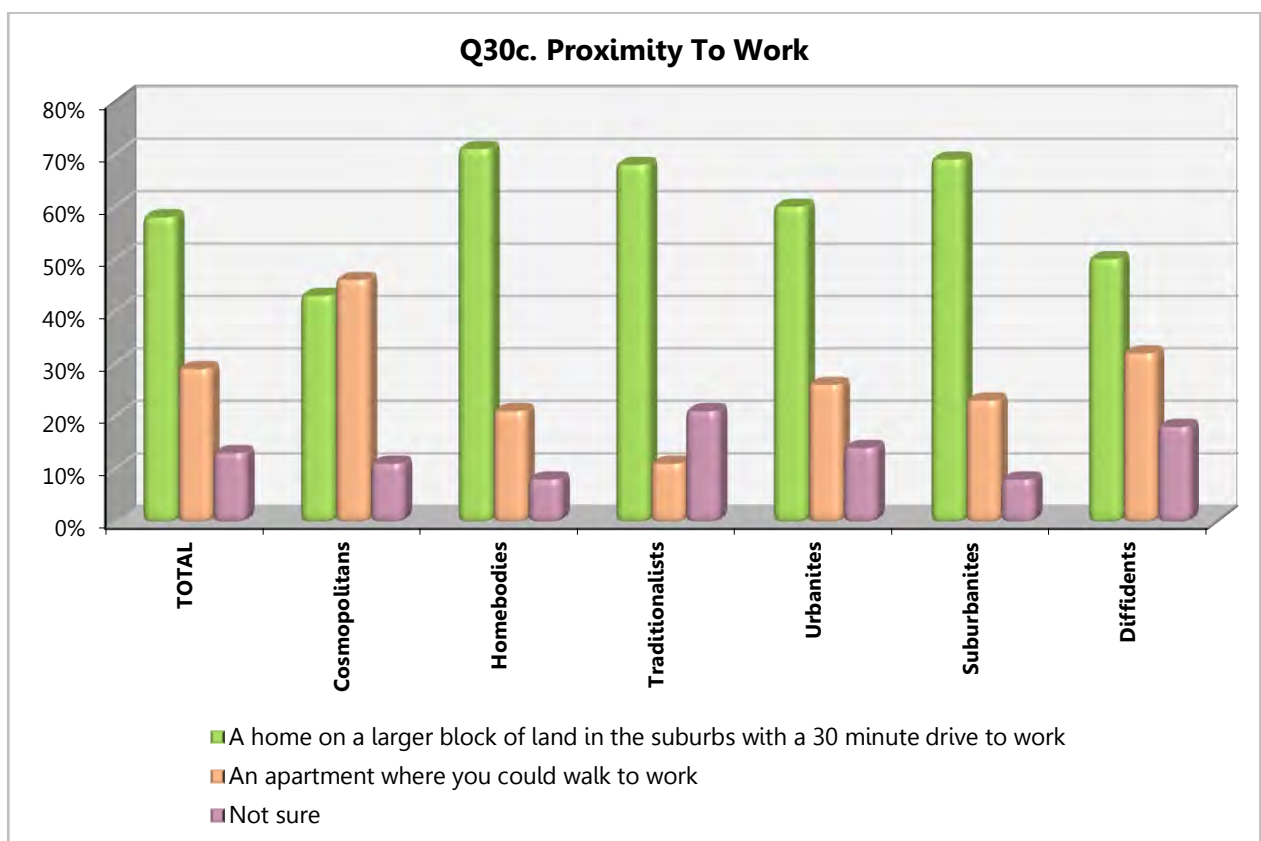
Question 30b – What parking and public transport options would you prefer in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
A home with parking for two cars	64%	59%	58%	66%	64%	79%	58%
A home with parking for one car and easy access to good public transport	32%	38%	40%	32%	26%	21%	24%
Not sure	4%	3%	2%	2%	10%	0%	18%



Question 30c – Proximity to work and transport preferences in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	360	105	52	62	42	61	38
A home on a larger block of land in the suburbs with a 30 minute drive to work	58%	43%	71%	68%	60%	69%	50%
An apartment where you could walk to work	29%	46%	21%	11%	26%	23%	32%
Not sure	13%	11%	8%	21%	14%	8%	18%



4.13 Apartment Living – Attitudes (Purchase)

Question 31 & Question 32 are to be asked of respondents who answered either very attractive or attractive to apartment living in Question 28 (type of home that would be attractive), everyone else skip to Question 33.

Question 31 - What do you find most attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size (caution small sample size)	110	45	7	8	28	6	16
Low maintenance	40%	56%	14%	38%	29%	33%	31%
Views	14%	7%	0%	38%	21%	17%	13%
No garden	12%	11%	29%	0%	4%	50%	13%
Security/intercom	11%	18%	29%	0%	4%	17%	0%
Small size	9%	4%	14%	13%	7%	17%	19%
Ability to 'lock up and leave'	8%	16%	0%	0%	0%	33%	0%
Common areas maintained by someone else	3%	2%	0%	0%	4%	0%	6%
Price - value for money	2%	2%	0%	13%	0%	0%	0%
Shared facilities such as laundry and storage	2%	4%	0%	0%	0%	0%	0%
Nothing	18%	2%	29%	13%	29%	0%	50%
Other	21%	29%	14%	25%	18%	17%	6%

This question was asked of those respondents who answered either very attractive or attractive to apartment living (11% of total respondents). Caution should be exercised in interpreting these findings due to the small sample size).

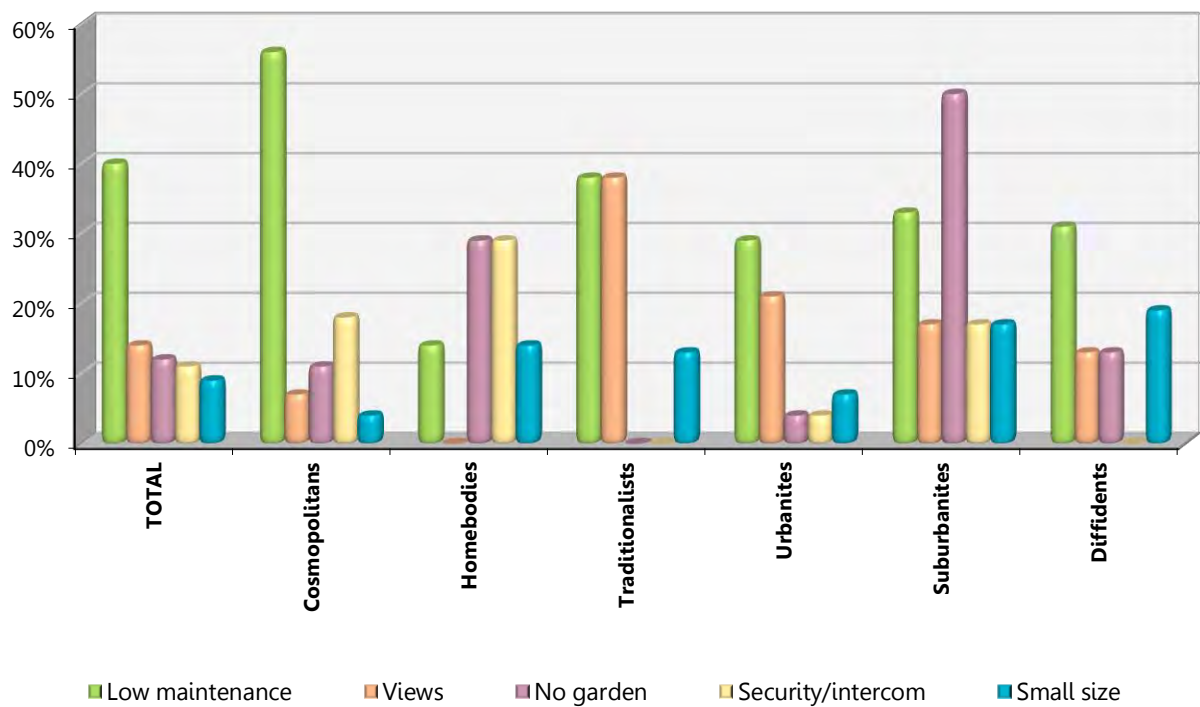
Low maintenance required of living in an apartment was the most attractive feature for 40% of these respondents, increasing to 56% of the Cosmopolitans segment (caution small sample size).

Other features that were popular with respondents include:

- Close to everything (x2)
- Convenience to city (x2)
- Anonymity
- Be able to live closer to the city
- Being in the city (imagining a city apartment)
- Can lock up and go away, easy
- Close neighbours
- Close to CBD
- Close to facilities and city

- Close to shopping and entertainment
- Close to work and school if in an apartment in city
- Distance to places
- Easy access, inner city
- Easy to get around the city - not a lot of travel
- Friends
- It's like you're on a holiday all year round
- It is most of the time in the middle of town
- Modernity makes it clean and nice
- Proximity to work
- Walk rather than transport, and convenience in city

Q31. What Do You Find Most Attractive About Living In An Apartment? - Top 5



Question 32 - And what do you find least attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	110	45	7	8	28	6	16
Noise from other apartments	35%	38%	29%	75%	29%	67%	6%
Small size	23%	33%	14%	25%	14%	0%	19%
No privacy	8%	4%	14%	0%	11%	33%	6%
No garden	7%	13%	14%	0%	0%	0%	6%
High strata fees	5%	9%	0%	13%	0%	0%	0%
Price - value for money	3%	4%	0%	0%	4%	0%	0%
Can't have a pet	3%	7%	0%	0%	0%	0%	0%
No/inadequate storage	2%	4%	0%	0%	0%	0%	0%
Shared facilities such as laundry and storage	2%	2%	14%	0%	0%	0%	0%
Noise from the street/traffic	2%	0%	0%	25%	0%	0%	0%
Nothing	20%	7%	43%	0%	32%	0%	44%
Other	12%	4%	0%	38%	11%	17%	25%

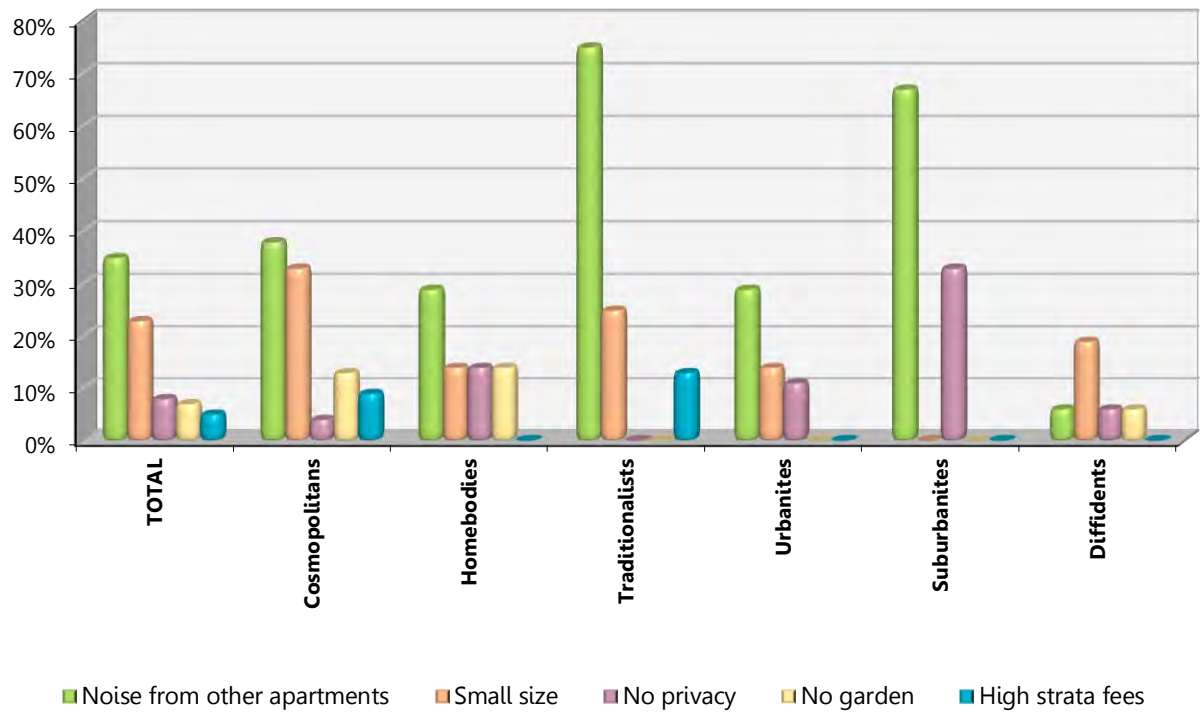
This question was asked of those respondents who answered either very attractive or attractive to apartment living (11% of total respondents). Caution should be exercised in interpreting these findings due to the small sample size).

Noise from other apartments was the least attractive feature for 35% of these respondents, while the small size of the apartment was least attractive for 23% of respondents (note small sample size for this question).

Other features that were least attractive with respondents include:

- Community living would put me off
- Lack of outdoor space and privacy
- Lift access, bringing shopping in and out, no outdoors, noisy
- Long waiting times in the elevator
- Low ceilings
- More four storey high blocks
- Neighbours nearby
- Not having an outdoor space
- Security
- Smell
- Stairs and elevator wait
- The look of them
- Using a lift every day

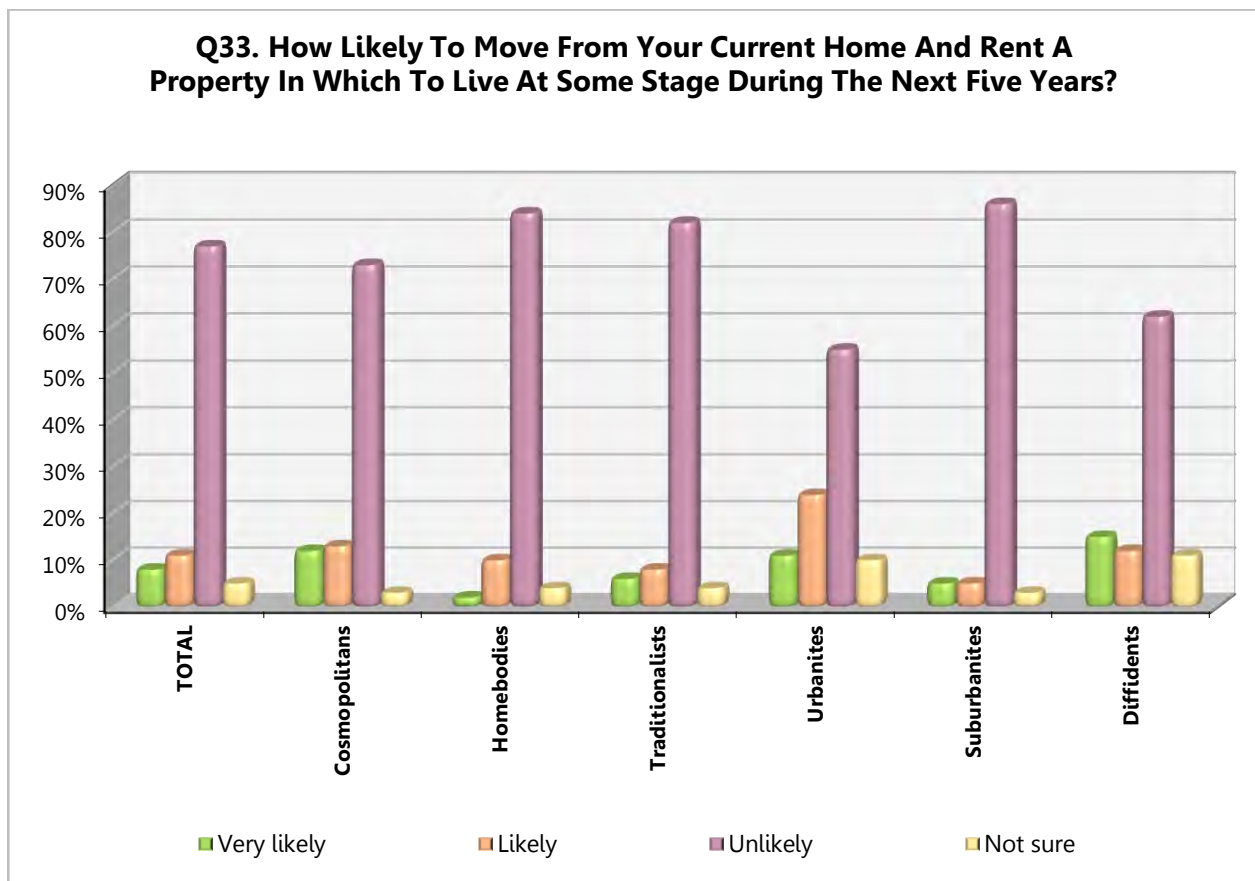
Q32. What Do You Find Least Attractive About Living In An Apartment? - Top 5



4.14 Renting – Intention, Budget and Features

Question 33 - 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?

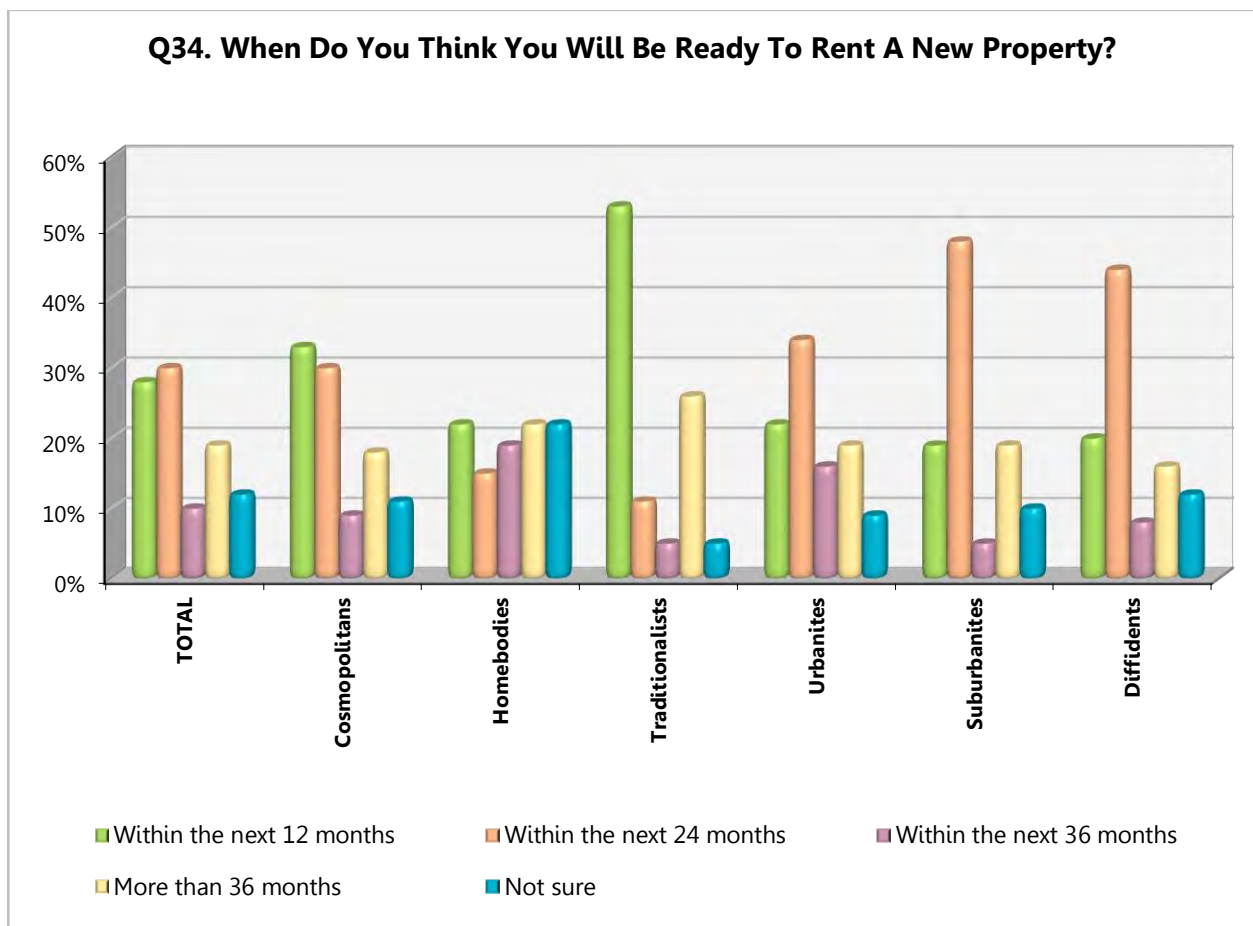
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Very likely	8%	12%	2%	6%	11%	5%	15%
Likely	11%	13%	10%	8%	24%	5%	12%
Unlikely	77%	73%	84%	82%	55%	86%	62%
Not sure	5%	3%	4%	4%	10%	3%	11%



A relatively small percentage of total respondents are likely to move from their current home and rent a property in the next five years (19%) increasing to 35% of the Urbanites. The Suburbanites are least likely to move from their current home and rent in the next five years, with 86% of the segment unlikely to move (compared to 77% of total respondents) closely followed by the Homebodies (84%) and Traditionalists (82%).

Question 34 - 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)	181	57	27	19	32	21	25
Within the next 12 months	28%	33%	22%	53%	22%	19%	20%
Within the next 24 months	30%	30%	15%	11%	34%	48%	44%
Within the next 36 months	10%	9%	19%	5%	16%	5%	8%
More than 36 months	19%	18%	22%	26%	19%	19%	16%
Not sure	12%	11%	22%	5%	9%	10%	12%



This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (18% of total respondents). 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 two years (58%) increasing to 67% for the Suburbanites segment.

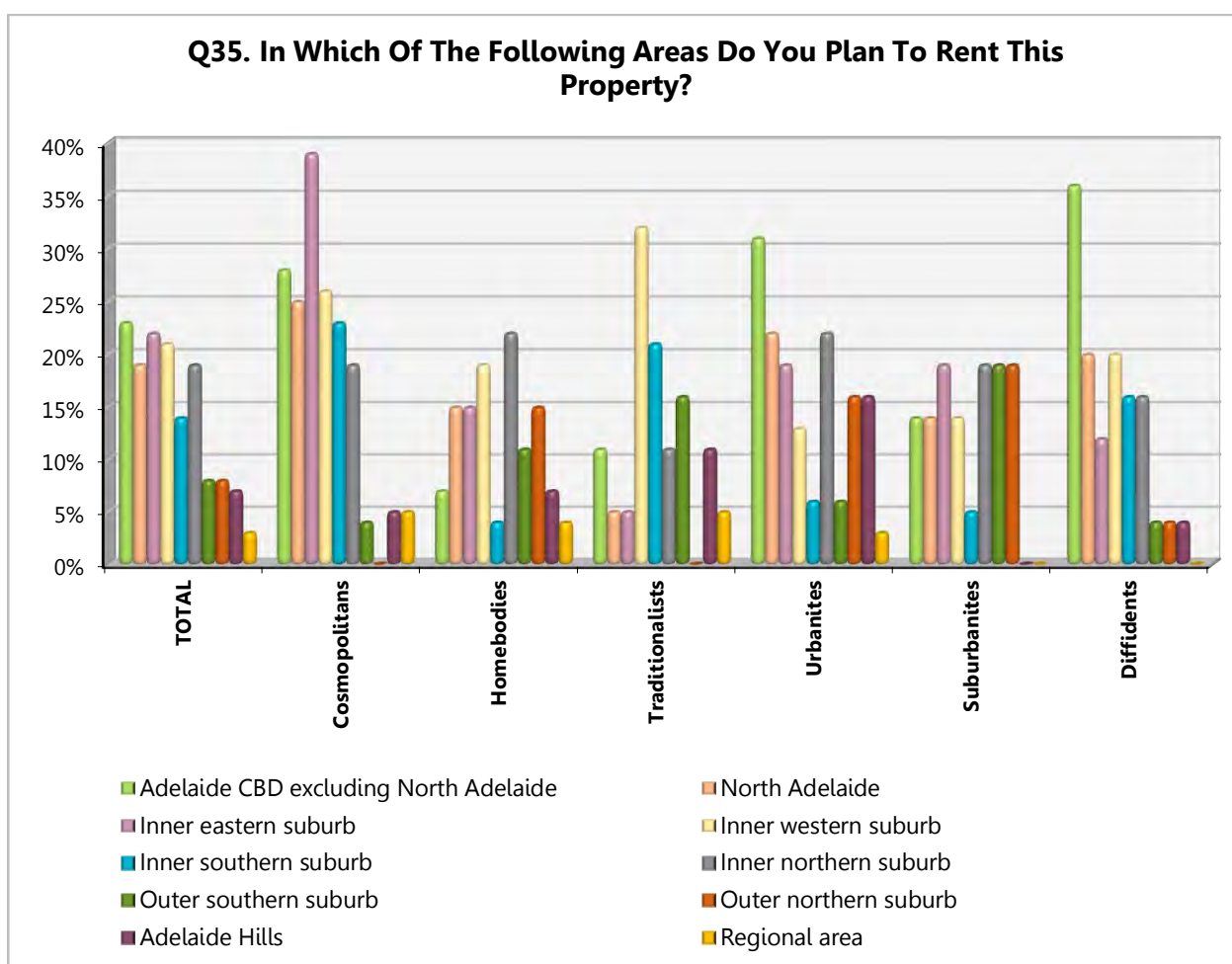
Question 35 - In which of the following areas do you plan to rent this property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	181	57	27	19	32	21	25
Adelaide CBD excluding North Adelaide	23%	28%	7%	11%	31%	14%	36%
North Adelaide	19%	25%	15%	5%	22%	14%	20%
Inner eastern suburb	22%	39%	15%	5%	19%	19%	12%
Inner western suburb	21%	26%	19%	32%	13%	14%	20%
Inner southern suburb	14%	23%	4%	21%	6%	5%	16%
Inner northern suburb	19%	19%	22%	11%	22%	19%	16%
Outer southern suburb	8%	4%	11%	16%	6%	19%	4%
Outer northern suburb	8%	0%	15%	0%	16%	19%	4%
Adelaide Hills	7%	5%	7%	11%	16%	0%	4%
Regional area	3%	5%	4%	5%	3%	0%	0%
Other	7%	9%	0%	16%	3%	10%	8%
Not sure	17%	11%	30%	21%	9%	19%	20%

This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (18% of total respondents).

Of those respondents who indicated they would be likely to move from their current property and rent in the next five years, 23% indicated that they plan to rent in the Adelaide CBD, increasing to 36% of the Diffidents segment. Over a third of the Cosmopolitans prefer the inner eastern suburbs (39% compared to 22% of total respondents) while 32% of the Traditionalists prefer the inner western suburbs (compared to 21% for total respondents).

Please refer to the chart on the following page.



Question 36 - If Adelaide CBD not one of the areas considered ask: I notice you didn't choose Adelaide as one of the areas you would consider. What are your main reasons for this?

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. Reasons provided by respondents include:

Main Reasons For Not Selecting Adelaide			
Too expensive/ better value elsewhere	Too busy/ crowded/ cramped/ dirty/ polluted/ loud/ unsafe	Don't want to live in CBD/ want to live somewhere quieter, greener and more open	Not close to family/ work/ study
33	30	26	12
Want a house and yard/ garden not an apartment	Little parking/ heavy traffic	Not a place for families/ children/ pets	Don't know enough about city living
10	9	7	1

Question 37 - 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)?

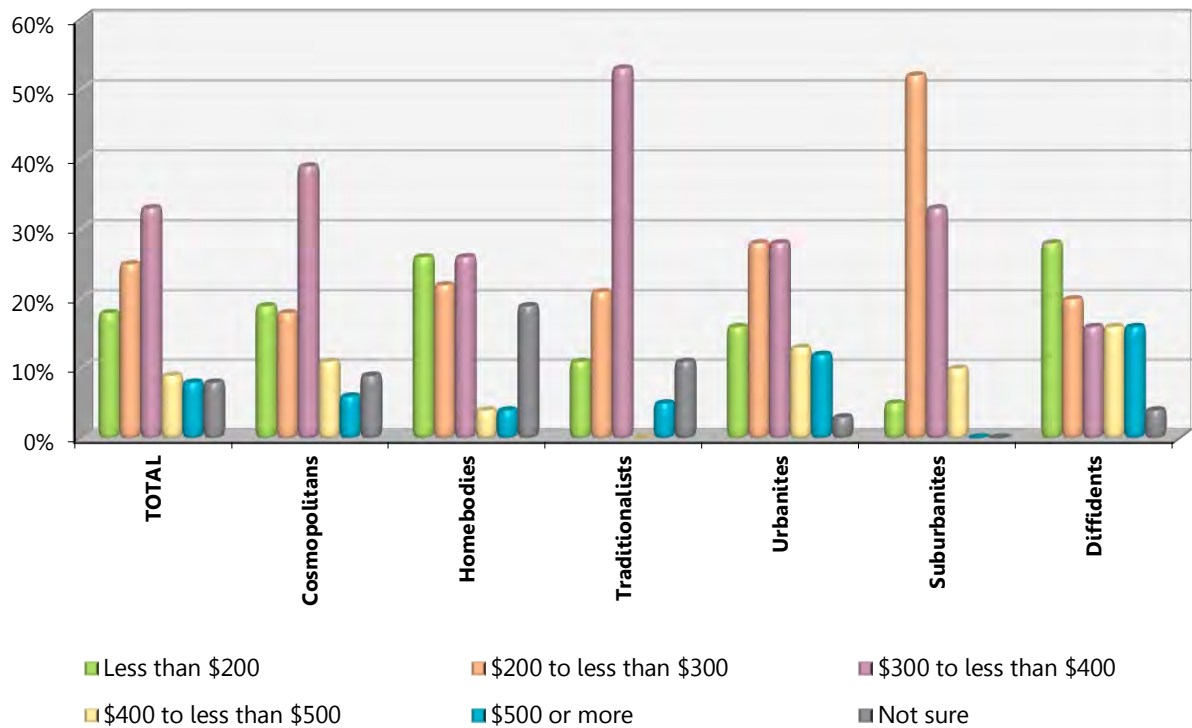
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	181	57	27	19	32	21	25
Less than \$100	1%	0%	0%	0%	3%	0%	4%
\$100 to less than \$200	17%	19%	26%	11%	13%	5%	24%
\$200 to less than \$300	25%	18%	22%	21%	28%	52%	20%
\$300 to less than \$400	33%	39%	26%	53%	28%	33%	16%
\$400 to less than \$500	9%	11%	4%	0%	13%	10%	16%
\$500 to less than \$600	2%	2%	4%	0%	0%	0%	4%
\$600 to less than \$700	3%	4%	0%	0%	6%	0%	4%
\$700 to less than \$800	0%	0%	0%	0%	0%	0%	0%
\$800 to less than \$900	2%	0%	0%	5%	6%	0%	4%
\$900 to less than \$1,000	0%	0%	0%	0%	0%	0%	0%
\$1,000 or more	1%	0%	0%	0%	0%	0%	4%
Not sure	8%	9%	19%	11%	3%	0%	4%

This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (18% of total respondents).

Over half of those respondents likely to rent in the next five years stated their budget to rent a home would be in the \$200 to \$400 per week price range (58%), increasing to 85% for the Suburbanites. The Diffidents are more likely to have a budget greater than \$500 per week (16% compared to 8% of total respondents) while 28% of the Diffidents segment would have a budget less than \$200 per week (compared to 18% of total respondents).

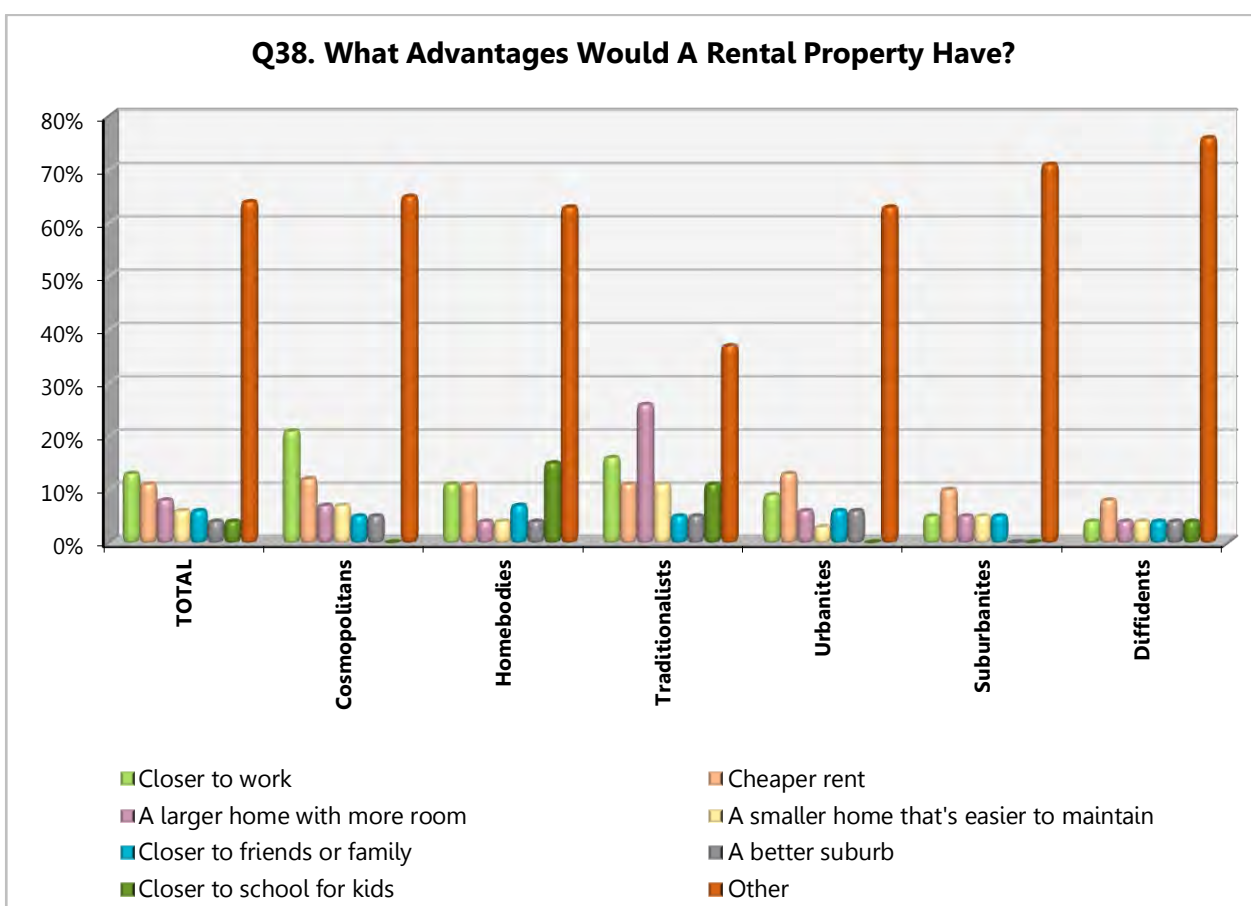
Please refer to the chart on the following page.

Q37. Which Of The Following Options Would Best Match The Amount Of Rent You Would Be Prepared To Pay Each Week For This Property?



Question 38 - And what advantages would this rental property have?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	181	57	27	19	32	21	25
Closer to work	13%	21%	11%	16%	9%	5%	4%
Cheaper rent	11%	12%	11%	11%	13%	10%	8%
A larger home with more room	8%	7%	4%	26%	6%	5%	4%
A smaller home that's easier to maintain	6%	7%	4%	11%	3%	5%	4%
Closer to friends or family	6%	5%	7%	5%	6%	5%	4%
A better suburb	4%	5%	4%	5%	6%	0%	4%
Closer to school for kids	4%	0%	15%	11%	0%	0%	4%
Other	64%	65%	63%	37%	63%	71%	76%



This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (18% of total respondents). 'Closer to work' was the most popular advantage for renting (13%) while a further 11% of respondents would move for cheaper rent.

Another advantage that renting would provide included 'moving out of home' (x5 respondents) with the following additional advantages of renting being nominated by respondents:

Other Advantages Of Renting			
Upgrade 17	Closer to other amenities (beach, city, shops, transport, job, nature) 16	Moving out of home, moving in with girlfriend / boyfriend, moving out on own 10	Like the location, safe area 7
Trialing area, temporary while building new home 8	Particular features (sustainability features, particular number of bedrooms, NBN access) 5	Financial (cheaper place, don't want to buy a place, no deposit, cheaper to rent) 6	Renting offers a more flexible lifestyle option 3

Question 39 - 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 (18% of total respondents).

Three-quarters of those respondents likely to move from their current property and rent in the next five years indicated that they found a detached home on a block of land to be the most attractive option (38% very attractive and 36% attractive). The next most popular type of home was a townhouse/terrace house with 67% of respondents finding that an attractive option (17% very attractive and 50% attractive). More than a third (38%) of these respondents claimed an apartment in a 3 to 4 building would be attractive, 28% an apartment in a 5 to 8 storey building, 25% an apartment in a 9 to 12 storey building and 26% in a building of more than 12 storeys.

	Very attractive	Attractive	Not sure	Not attractive
Detached home on a block of land	38%	36%	10%	16%
Townhouse or terrace house	17%	50%	10%	24%
Apartment in a 3 to 4 storey building	10%	28%	13%	49%
Apartment in a 5 to 8 storey building	8%	20%	12%	60%
Apartment in a 9 to 12 storey building	8%	17%	13%	61%
Apartment in a building of more than 12 storeys	7%	19%	13%	61%
Retirement unit	3%	11%	10%	76%
Other (specify)	9%	7%	83%	1%

Other home types nominated by respondents included:

- Units in a single story (x2)
- A unit in a single storey block
- Anything that isn't like a large block of flats
- Apartment less than 2 storeys
- Cottage
- Double story
- Duplex
- Granny flat
- Ground floor unit
- Housing tract with acreage
- Pet friendly, with a view
- Single storey unit or Duplex
- Stand-alone unit

Q40. In the following questions I would like to ask you about some of the features you might like in your rental property? This question was asked of those respondents who would be likely to move from their current property and rent in the next five years.

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:

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

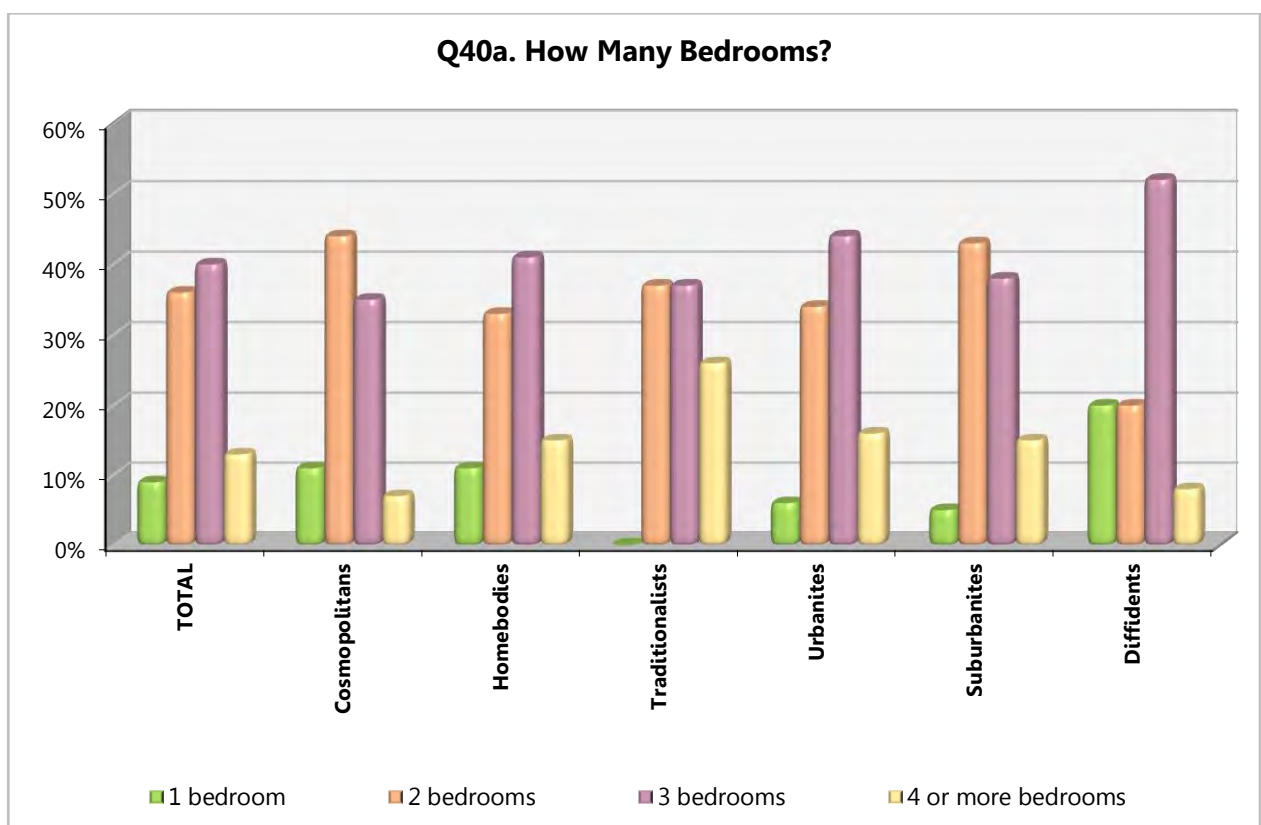
Key points to note regarding design features to be incorporated into a rental property are as follows:

- Nearly half of those respondents who would be likely to rent a property in the next five years would prefer three bedrooms (40%) increasing to 52% of the Diffidents. The Traditionalists are more likely to prefer four bedrooms (21% compared to 11% of total respondents) while the Cosmopolitans prefer two bedrooms (44% compared to 36% of total respondents)
- Over half of respondents would prefer two bathrooms (52%) increasing to 68% of the Diffidents. The Homebodies are more likely to prefer one bathroom (56% compared to 43% of total respondents) reflecting their preference for houses with a smaller number of bedrooms
- Over half of respondents would prefer one living space (56%) increasing to 72% of the Urbanites segment. Nearly half of the Traditionalists are more likely to prefer two living spaces (47% compared to 38% of total respondents)
- Over half of respondents would prefer two car spaces (52%) increasing to 58% of the Traditionalists segment. The Diffidents are more likely to prefer a larger number of car spaces (16% for four or more car spaces compared to 8% of total respondents) while the Homebodies are more likely to prefer one car space (44% each compared to 30% of total respondents)
- An outdoor entertainment area was favoured by nearly all of these respondents (81%)

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

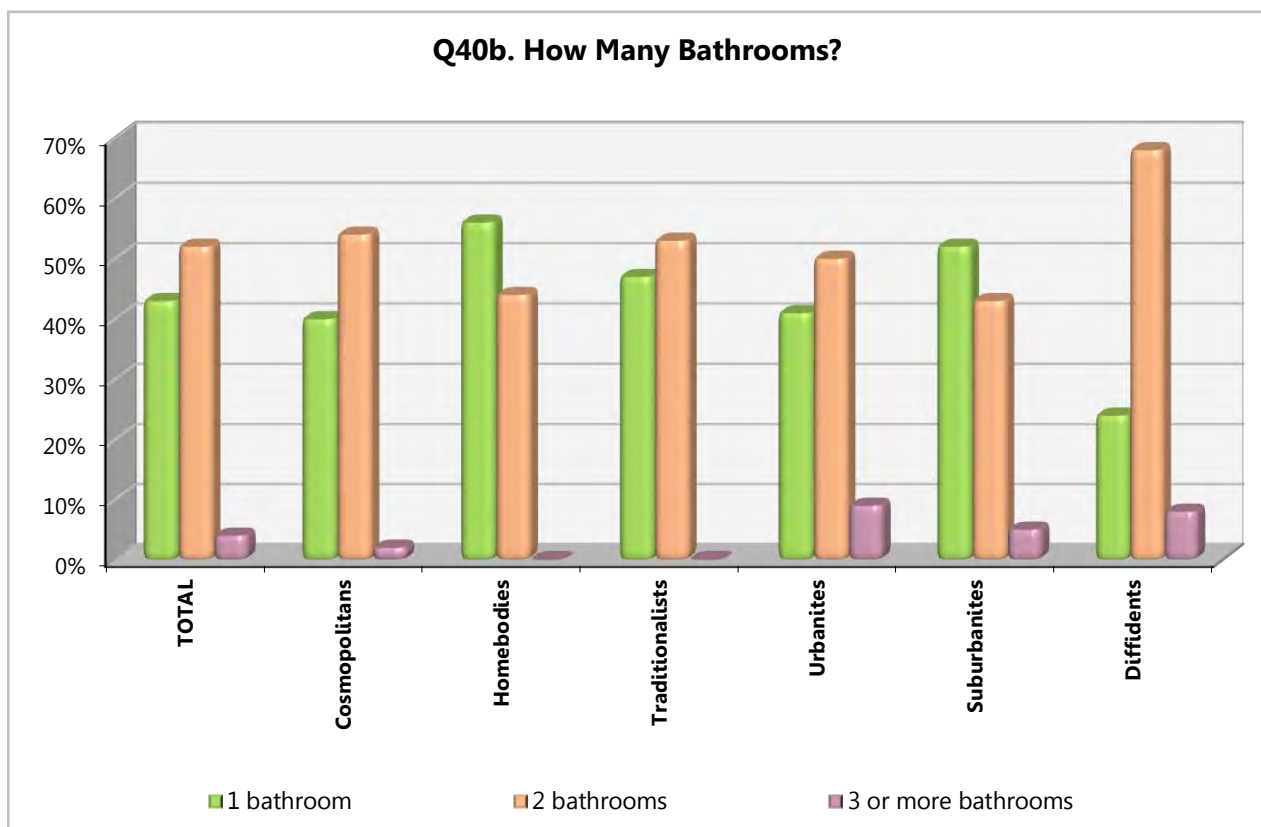
Question 40a – How many bedrooms would you like in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	181	57	27	19	32	21	25
None	1%	4%	0%	0%	0%	0%	0%
1 bedroom	9%	11%	11%	0%	6%	5%	20%
2 bedrooms	36%	44%	33%	37%	34%	43%	20%
3 bedrooms	40%	35%	41%	37%	44%	38%	52%
4 bedrooms	11%	7%	15%	21%	16%	10%	4%
5 bedrooms	1%	0%	0%	5%	0%	0%	0%
6 or more bedrooms	1%	0%	0%	0%	0%	5%	4%



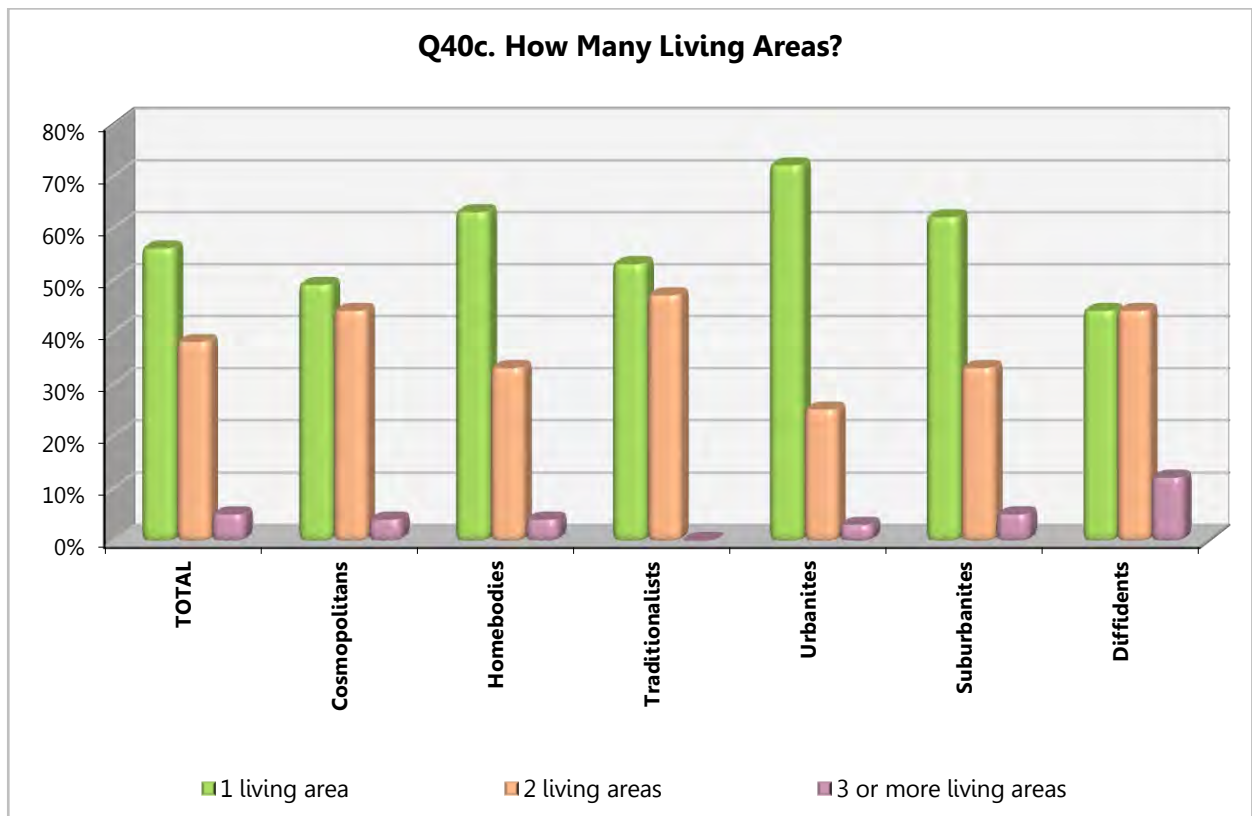
Question 40b – How many bathrooms would you like in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	181	57	27	19	32	21	25
1 bathroom	43%	40%	56%	47%	41%	52%	24%
2 bathrooms	52%	54%	44%	53%	50%	43%	68%
3 bathrooms	3%	2%	0%	0%	9%	5%	4%
4 bathrooms	0%	0%	0%	0%	0%	0%	0%
5 or more bathrooms	1%	0%	0%	0%	0%	0%	4%



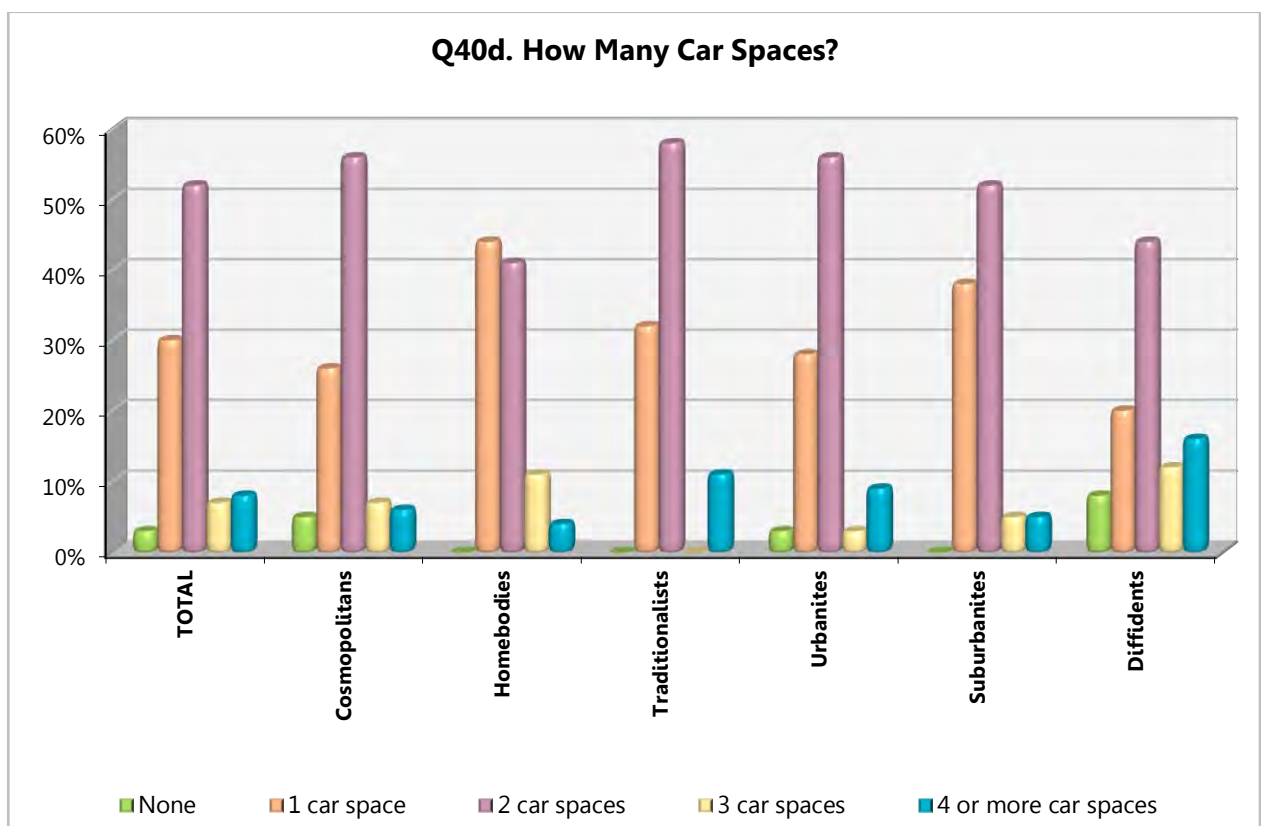
Question 40c – How many living areas would you like in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	181	57	27	19	32	21	25
1 living area	56%	49%	63%	53%	72%	62%	44%
2 living areas	38%	44%	33%	47%	25%	33%	44%
3 living areas	3%	4%	4%	0%	0%	5%	4%
4 living areas	0%	0%	0%	0%	0%	0%	0%
5 living areas	1%	0%	0%	0%	0%	0%	4%
6 or more living areas	1%	0%	0%	0%	3%	0%	4%



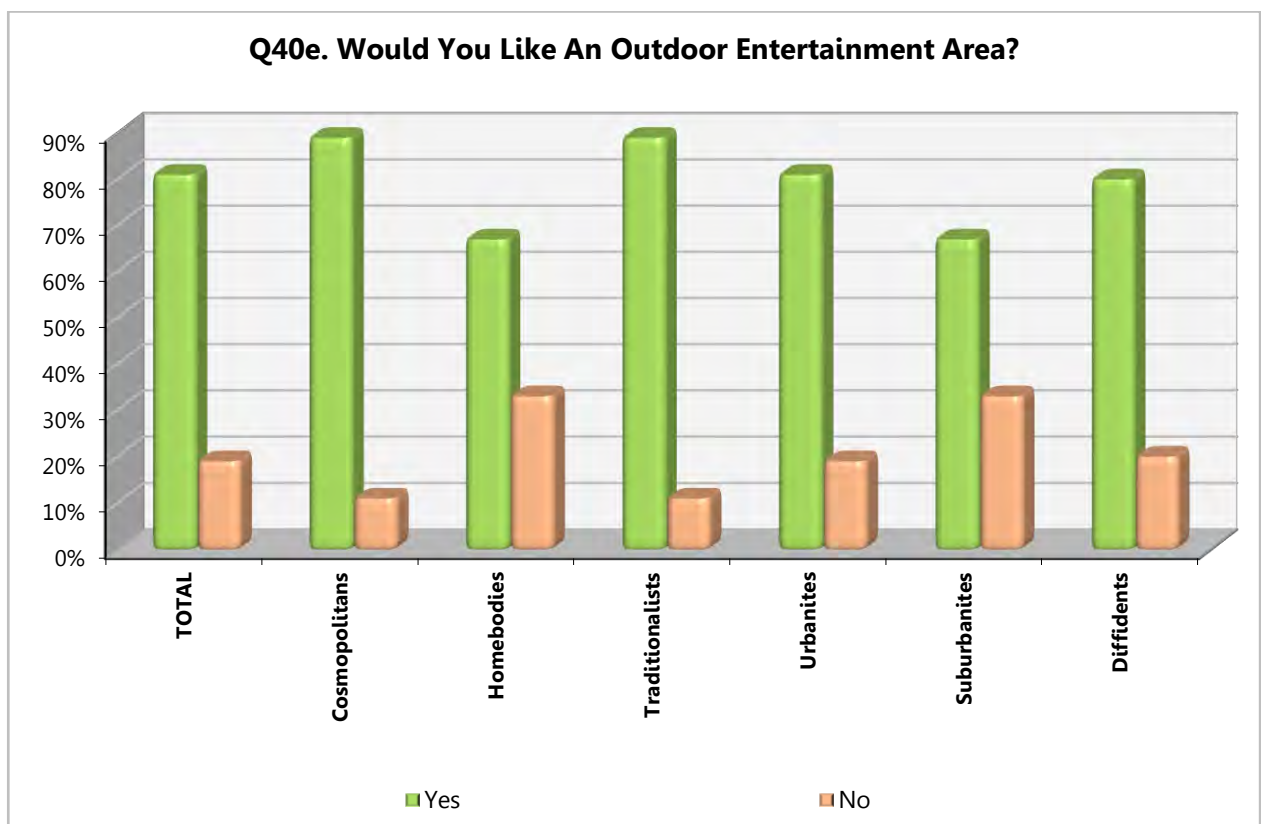
Question 40d – How many car spaces would you like in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	181	57	27	19	32	21	25
None	3%	5%	0%	0%	3%	0%	8%
1 car space	30%	26%	44%	32%	28%	38%	20%
2 car spaces	52%	56%	41%	58%	56%	52%	44%
3 car spaces	7%	7%	11%	0%	3%	5%	12%
4 car spaces	4%	2%	0%	11%	9%	0%	4%
5 car spaces	1%	0%	4%	0%	0%	0%	4%
6 or more car spaces	3%	4%	0%	0%	0%	5%	8%



Question 40e – Would you like an outdoor entertainment area in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	181	57	27	19	32	21	25
Yes	81%	89%	67%	89%	81%	67%	80%
No	19%	11%	33%	11%	19%	33%	20%



4.15 Apartment Living – Attitudes (Rental)

Question 41 & Question 42 are to be asked of respondents who answered either very attractive or attractive to apartment living in Question 39, everyone else skip to Question 43.

Question 41 - What would you find most attractive about living in an apartment?

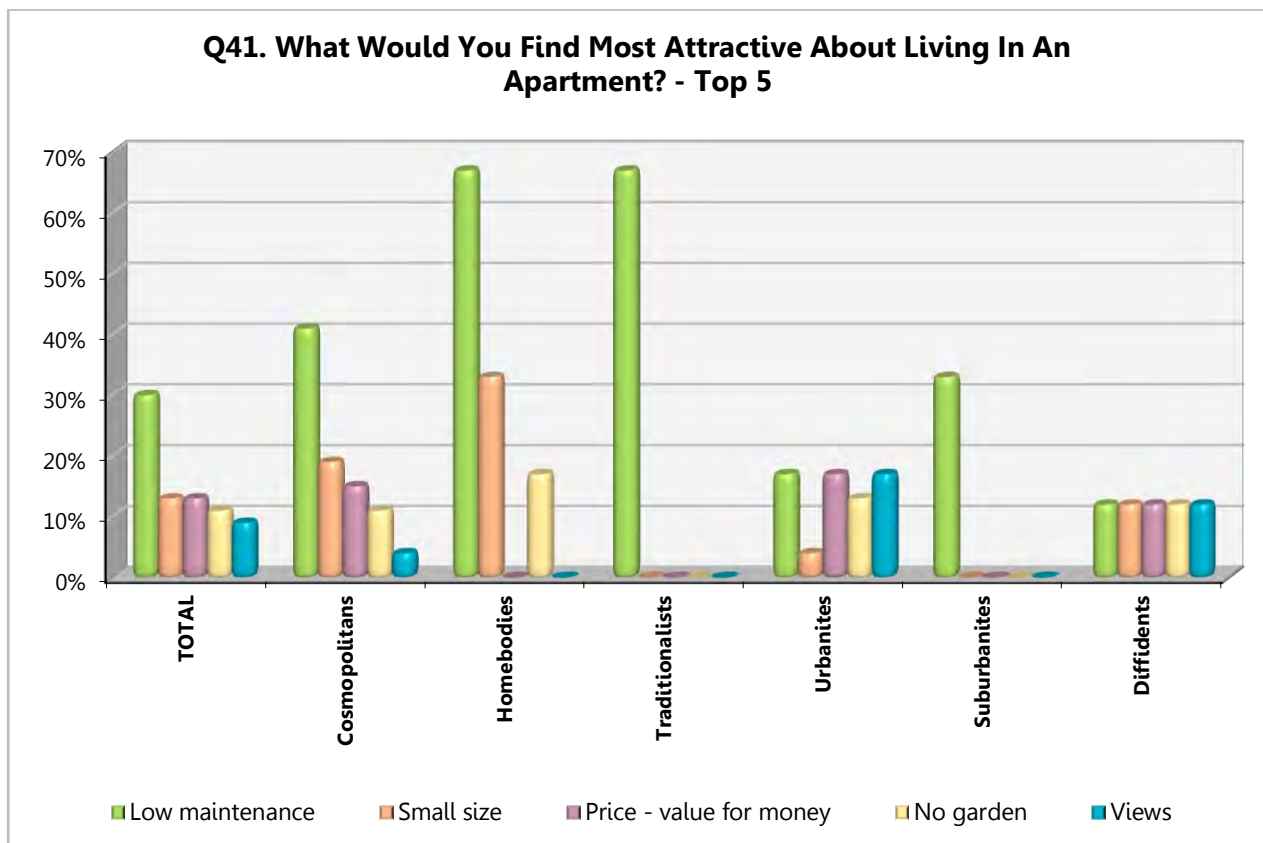
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample size)	79	27	6	3	23	3	17
Low maintenance	30%	41%	67%	67%	17%	33%	12%
Small size	13%	19%	33%	0%	4%	0%	12%
Price - value for money	13%	15%	0%	0%	17%	0%	12%
No garden	11%	11%	17%	0%	13%	0%	12%
Views	9%	4%	0%	0%	17%	0%	12%
Ability to 'lock up and leave'	5%	4%	17%	0%	9%	0%	0%
Shared facilities such as laundry and storage	1%	4%	0%	0%	0%	0%	0%
Nothing	23%	11%	0%	0%	26%	33%	47%
Other	27%	30%	17%	33%	26%	33%	24%

This question was asked of those respondents who answered either very attractive or attractive to apartment living (8% of the total sample). Low maintenance required when living in an apartment is the most attractive feature for 30% of these respondents (note the small sample size for this question).

Other features that were popular with respondents include:

- Location (x2)
- Anonymity
- Being in the city
- Cheaper rates
- Climate control
- Closer to my clients
- Convenience in terms of being close to work
- Convenience to city
- It's close to the cafes
- It's modern
- My own space!
- Peace and quiet
- Quiet

- Same as with a purchased apartment - opportunity for a sense of community with other residents, and security of an apartment complex
- Security
- Staying alone
- Style of living prevents urban sprawl
- The location would ideally be close
- The look of it
- Usually it's location



Question 42 - 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)	79	27	6	3	23	3	17
Noise from other tenants	27%	33%	50%	33%	26%	0%	12%
Small size	20%	26%	17%	33%	17%	33%	12%
No garden	10%	19%	33%	0%	4%	0%	0%
Price - value for money	8%	7%	0%	0%	9%	33%	6%
No privacy	5%	11%	0%	0%	0%	33%	0%
No storage	5%	4%	0%	0%	0%	0%	18%
Shared facilities such as laundry and storage	3%	7%	0%	0%	0%	0%	0%
Small or no balconies	3%	0%	0%	0%	9%	0%	0%
Nothing	15%	4%	0%	0%	22%	0%	35%
Other	16%	0%	0%	33%	26%	33%	29%

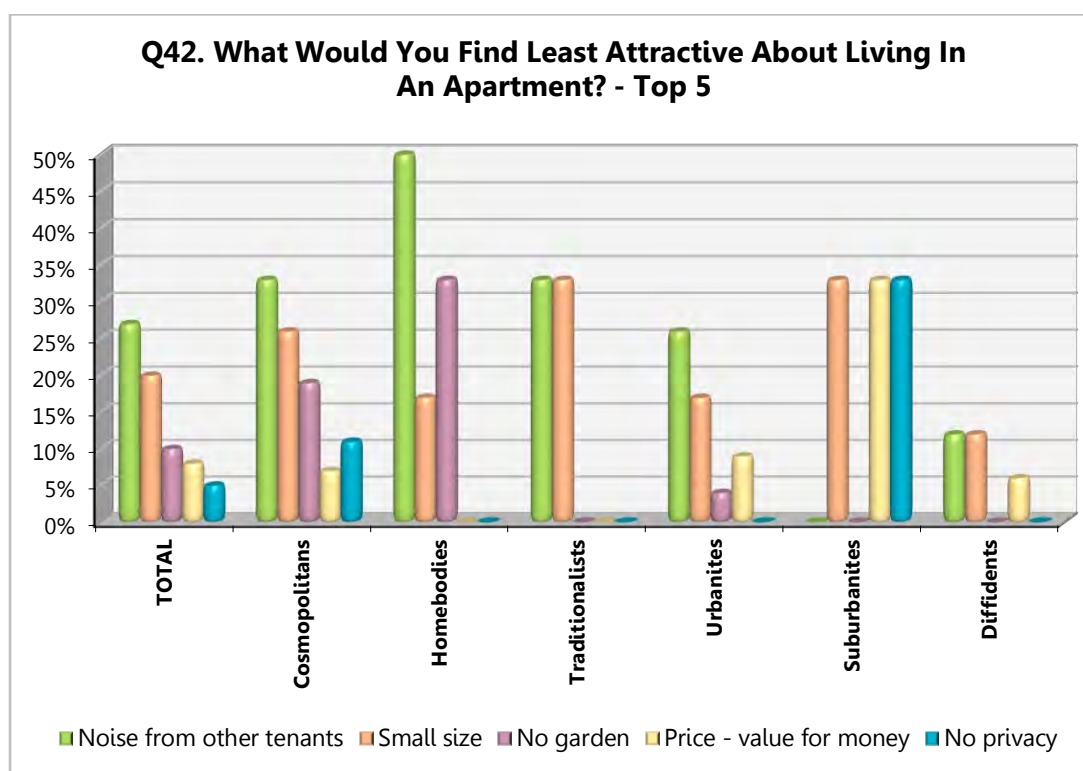
This question was asked of those respondents who answered either very attractive or attractive to apartment living (8% of total respondents).

When asked what they would find least attractive about living in an apartment 'Noise from other tenants' was the least attractive feature for 27% of these respondents, while the 'Small size' of the apartment was least attractive for 20% of respondents (note the small sample size for this question).

Other features that respondents claimed to be least attractive include:

- Close to neighbours
- Further from parents
- Lifts and location
- Living alone
- Not being able to have pets
- Privacy
- Security

Please refer to the chart on the following page.



4.16 Information Sources – Residential Areas

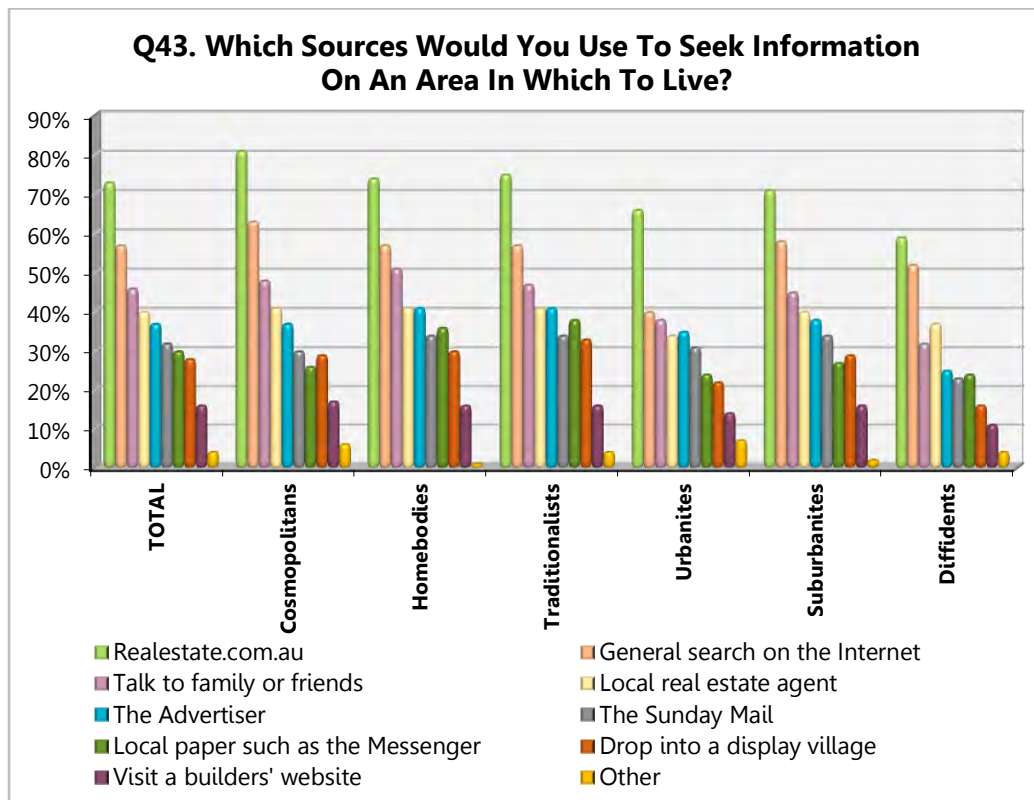
Question 43 - Please imagine you were seeking information on an area in which to live. Which of the following information sources would you use?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Realestate.com.au	73%	81%	74%	75%	66%	71%	59%
General search on the Internet	57%	63%	57%	57%	40%	58%	52%
Talk to family or friends	46%	48%	51%	47%	38%	45%	32%
Local real estate agent	40%	41%	41%	41%	34%	40%	37%
The Advertiser	37%	37%	41%	41%	35%	38%	25%
The Sunday Mail	32%	30%	34%	34%	31%	34%	23%
Local paper such as the Messenger	30%	26%	36%	38%	24%	27%	24%
Drop into a display village	28%	29%	30%	33%	22%	29%	16%
Visit a builders' website	16%	17%	16%	16%	14%	16%	11%
Other	4%	6%	1%	4%	7%	2%	4%
Not sure	3%	0%	2%	1%	4%	4%	14%

Nearly three-quarters of total respondents indicated they would research areas in which to live by visiting the realestate.com.au website (73%) increasing to 81% of the Cosmopolitans. This was followed by a general search on the Internet (57%) and then talking to family or friends (46%).

‘Other’ responses nominated by respondents include:

- Domain.com.au (x4)
- Social media (x3)
- Consult a building/property consultant
- Drive around the suburb and look
- Driving around
- Drop by and have a look
- Drove around and looked
- Fairs and school fetes
- General knowledge from what I know from having been through areas
- Go to an inspection
- Gumtree.com.au
- Have a walk around the area
- Housing Trust
- Library council
- Look in the area
- Prior knowledge (I'm a local)
- Research on own without using the above
- RPdata (a valuation source)
- Seniors Retirement seminar - government run seminar
- Visit and see the suburb for self
- Visiting houses for sale
- Walk around areas and have a look
- Word of mouth

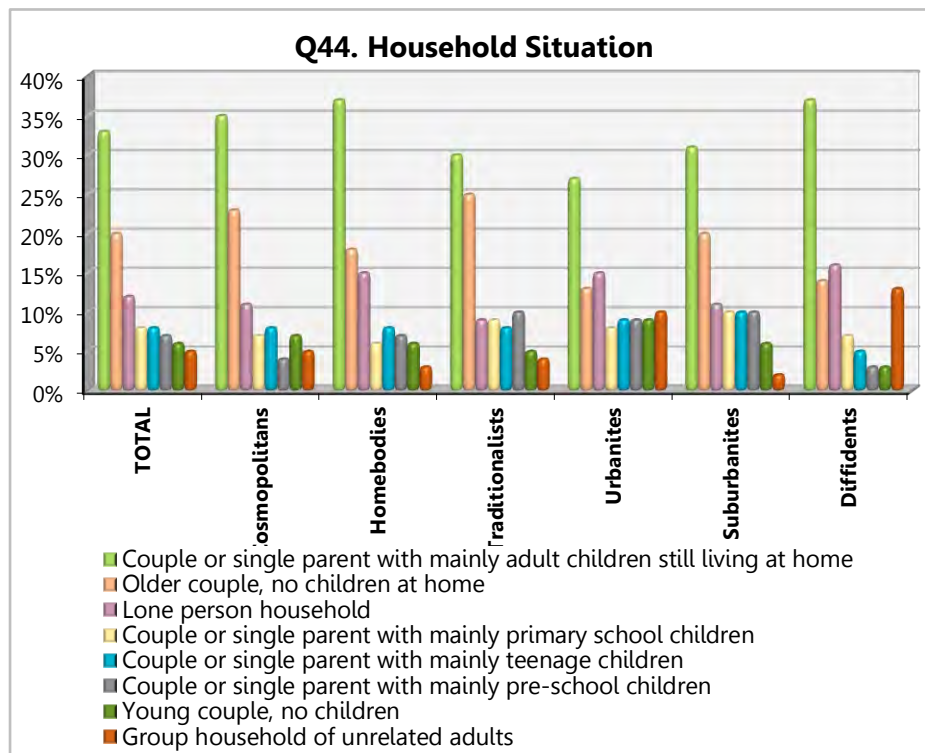


4.17 Household Type, Occupation, Income

Question 44 - To finish, could I please ask you a few questions about yourself? Which of the following categories best describes your household situation?

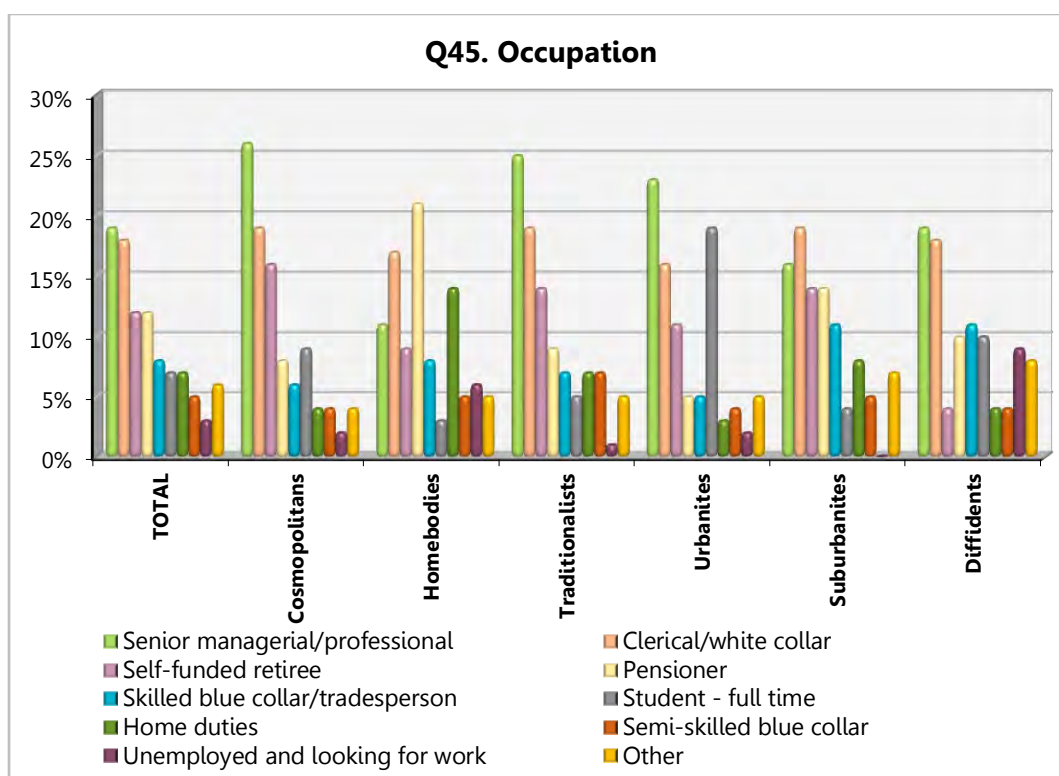
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Couple or single parent with mainly adult children still living at home	33%	35%	37%	30%	27%	31%	37%
Older couple, no children at home	20%	23%	18%	25%	13%	20%	14%
Lone person household	12%	11%	15%	9%	15%	11%	16%
Couple or single parent with mainly primary school children	8%	7%	6%	9%	8%	10%	7%
Couple or single parent with mainly teenage children	8%	8%	8%	8%	9%	10%	5%
Couple or single parent with mainly pre- school children	7%	4%	7%	10%	9%	10%	3%
Young couple, no children	6%	7%	6%	5%	9%	6%	3%
Group household of unrelated adults	5%	5%	3%	4%	10%	2%	13%

A third of total respondents (33%) are couples or single parents with mainly adult children still living at home, increasing to 37% for both the Homebodies and Diffidents segments. The Traditionalists are more likely to be an older couple with no children at home (25% compared to 20% of total respondents) while the Diffidents are more likely to live in a group household of unrelated adults (13% compared to 5% of total respondents).



Question 45 - Which of the following best describes your occupation?

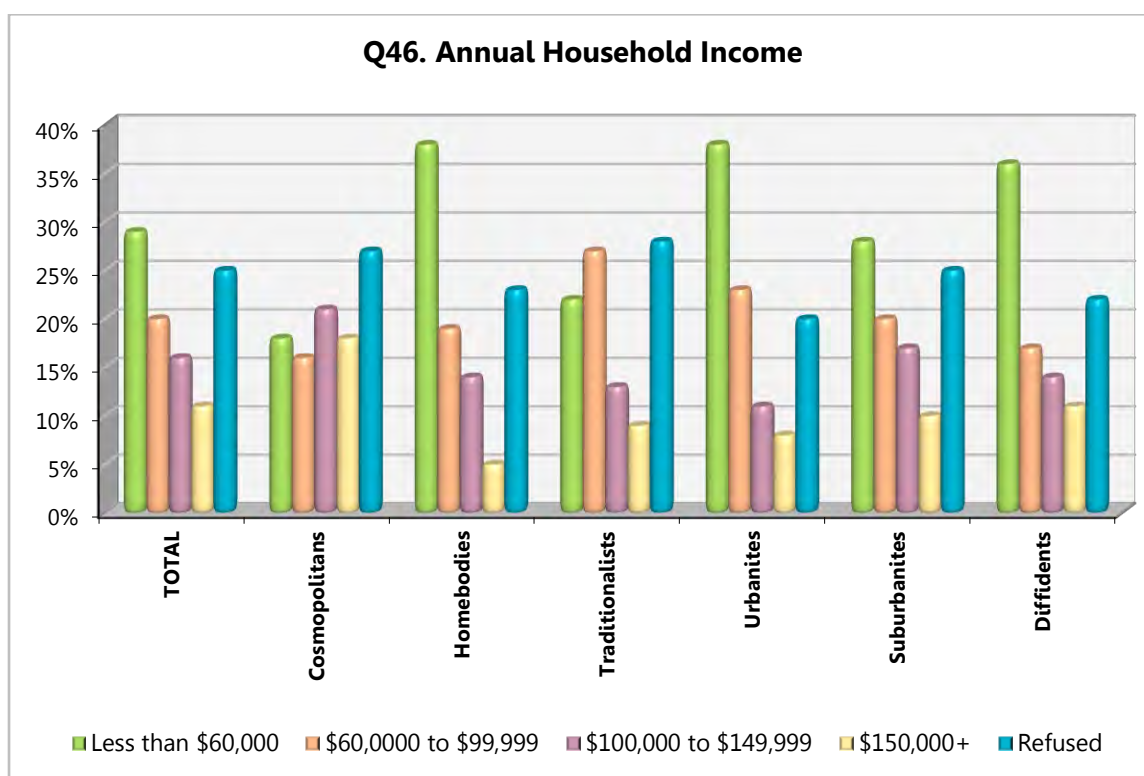
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	987	231	229	138	91	207	91
Senior managerial/professional	19%	26%	11%	25%	23%	16%	19%
Clerical/white collar	18%	19%	17%	19%	16%	19%	18%
Self-funded retiree	12%	16%	9%	14%	11%	14%	4%
Pensioner	12%	8%	21%	9%	5%	14%	10%
Skilled blue collar/tradesperson	8%	6%	8%	7%	5%	11%	11%
Student - full time	7%	9%	3%	5%	19%	4%	10%
Home duties	7%	4%	14%	7%	3%	8%	4%
Semi-skilled blue collar	5%	4%	5%	7%	4%	5%	4%
Unemployed and looking for work	3%	2%	6%	1%	2%	0%	9%
Student - part time	2%	2%	1%	0%	4%	1%	3%
Other	6%	4%	5%	5%	5%	7%	8%



Over a third of total respondents (37%) claim to be either in a senior managerial/professional group (19%) or clerical/white collar profession (18%). The Homebodies segment has a higher percentage of pensioners (21% compared to 12% of total respondents) and a higher percentage of home duties (14% compared to 7% of total respondents).

Question 46 - Which of the following best describes your total annual household income before tax?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
\$0 - \$19,999	5%	3%	7%	6%	5%	3%	8%
\$20,000 - \$39,999	13%	7%	17%	9%	18%	15%	12%
\$40,000 - \$59,999	11%	8%	14%	7%	15%	10%	16%
\$60,000 - \$79,999	10%	8%	8%	14%	9%	12%	9%
\$80,000 - \$99,999	10%	8%	11%	13%	14%	8%	8%
\$100,000 - \$129,999	11%	14%	10%	9%	9%	10%	10%
\$130,000 - \$149,999	5%	7%	4%	4%	2%	7%	4%
\$150,000+	11%	18%	5%	9%	8%	10%	11%
Refused	25%	27%	23%	28%	20%	25%	22%

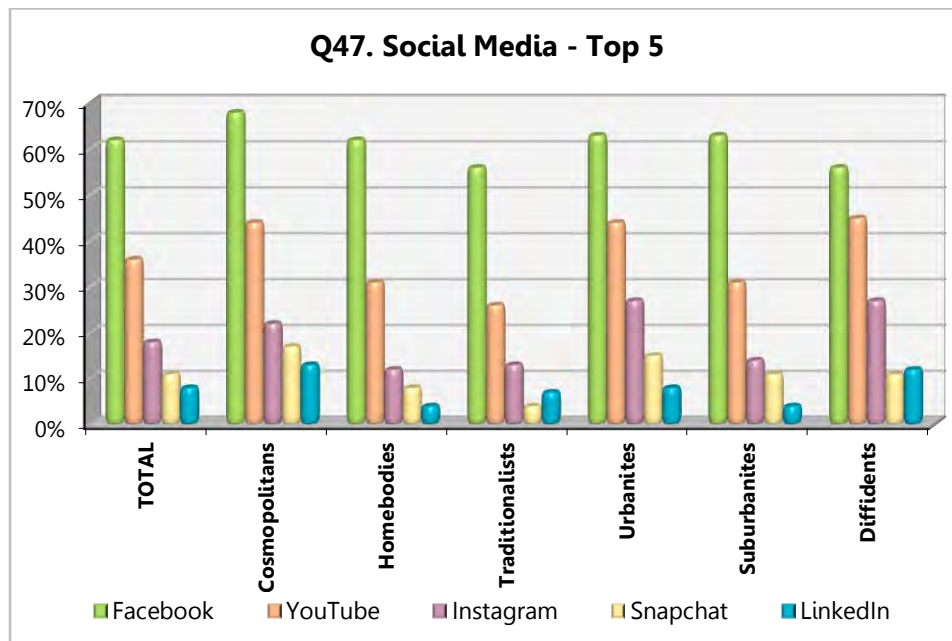


Over a third of total respondents (36%) have a total annual household income before tax of between \$60,000 and \$150,000 increasing to 40% of the Traditionalists segment. Over a third of the Homebodies and Urbanites segments have a total annual household income before tax of less than \$60,000 (38% compared to 29% of total respondents), with 18% of the Cosmopolitans segment with a total annual household income before tax of more than \$150,000 (compared to 11% of total respondents).

4.18 Social Media Use

Question 47 - Which of the following social media sites do you use at least once a week?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	987	231	229	138	91	207	91
Facebook	62%	68%	62%	56%	63%	63%	56%
YouTube	36%	44%	31%	26%	44%	31%	45%
Instagram	18%	22%	12%	13%	27%	14%	27%
Snapchat	11%	17%	8%	4%	15%	11%	11%
LinkedIn	8%	13%	4%	7%	8%	4%	12%
Twitter	8%	14%	5%	4%	12%	5%	10%
Chat rooms or forums	6%	8%	8%	2%	5%	3%	5%
Flickr	5%	7%	4%	2%	4%	3%	10%
Pinterest	5%	5%	6%	7%	3%	3%	8%
Tumblr	3%	3%	3%	1%	4%	1%	9%
Blogspot	1%	1%	0%	0%	2%	0%	3%
Other	1%	1%	2%	1%	2%	0%	2%
None	29%	24%	30%	38%	22%	32%	26%



Nearly two-thirds of all respondents indicated they use Facebook at least once a week (62%) and a further 36% of all respondents use YouTube at least once a week. The Cosmopolitans segment is more likely than any other segment to use social media at least once a week.

APPENDIX 1: SURVEY QUESTIONNAIRE

THIS QUESTIONNAIRE IS TO BE USED FOR THE FOLLOWING:

Adelaide metro residents – telephone survey n=1,000 (adults - catchment area agreed – excludes regional SA)

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 and the suburb and postcode you currently work or study in (MAIN RESIDENCE & WORK/STUDY PLACE)? SU*

SUBURB OF PRIMARY RESIDENCE (CONFIRM WITHIN STUDY AREA FOR METRO SURVEY ONLY BUT RECORD FOR ALL OTHER SURVEYS):	1
PRIMARY RESIDENCE POSTCODE:	2
SUBURB OF PRIMARY WORK OR STUDY PLACE	3
PRIMARY WORK OR STUDY PLACE POSTCODE:	4
Refused – THANK AND TERMINATE INTERVIEW EX SAMPLE	5

2. *Gender [DO NOT ASK]*

Male	1
Female	2

3. 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

IF PRIMARY PLACE OF WORK OR STUDY POSTCODE IS 5000 AND PRIMARY RESIDENCE IS NOT 5000

4. What is your main method of transport from your home to your place of work or study? SP

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

5. Approximately how much time do you spend travelling from your home to your place of 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

6. Given your daily travelling time, how attractive would living in the Adelaide CBD be for you?

Very attractive	1
Attractive	4
Unattractive	2
Very unattractive	3
Not sure	5

7. I would now like to seek your opinion on a series of features that could apply to six areas that you might possibly choose to live in. I am still interested in your views on these areas even if you are not planning to move to any of these areas at the moment. I will read you a feature and then ask you how important that feature would be if you were choosing an area to live in with 10 being very important through to 1 being not at all important.

I will then ask you which of the six areas you think this feature applies to. You might think the feature applies to all areas, some of the areas or none of the areas. When I mention the Adelaide CBD throughout this survey I am referring to the area bounded by North Terrace, West Terrace, South Terrace and East Terrace. CONFIRM THIS IS CLEAR SP ROTATE

	Importance (1 to 10)	Adelaide CBD	North Adelaide	Bowden	Prospect	Norwood	Unley
A good place to bring up kids		1	2	3	4	5	6
A good place to buy an investment property		1	2	3	4	5	6
A premium address		1	2	3	4	5	6
A safe & secure place to live		1	2	3	4	5	6
A tranquil place to live		1	2	3	4	5	6
Access to a range of entertainment options		1	2	3	4	5	6
Access to interesting festivals & events		1	2	3	4	5	6
Access to sporting facilities		1	2	3	4	5	6
Access to, recreation facilities		1	2	3	4	5	6
Bike friendly		1	2	3	4	5	6
Cafés & restaurants		1	2	3	4	5	6
Childcare facilities		1	2	3	4	5	6
Convenient car parking		1	2	3	4	5	6
Convenient for private schools		1	2	3	4	5	6
Convenient for public schools		1	2	3	4	5	6
Convenient for universities		1	2	3	4	5	6
Convenient for weekly shopping		1	2	3	4	5	6
Convenient public transport		1	2	3	4	5	6
Easy to walk around		1	2	3	4	5	6

Lots of parks with trees		1	2	3	4	5	6
Medical facilities and services		1	2	3	4	5	6
Public libraries		1	2	3	4	5	6
Safe areas for children to play outdoors		1	2	3	4	5	6
Specialty shops such as a butcher, greengrocer & newsagent		1	2	3	4	5	6
Tree lined streets		1	2	3	4	5	6
A vibrant & lively place to live		1	2	3	4	5	6

8. Are there any additional features not covered in the previous question that you would like to see included in an area you would choose to live in? MU

Yes (specify)	1
No	2
Not sure	3

9. Some areas of Adelaide tend to be associated with people who are at different stages in their lives, for instance young singles or retirees. Thinking about the same areas we have just been looking at, which of these do you think would be attractive for the following types of people? SP

	Adelaide CBD	North Adelaide	Bowden	Prospect	Norwood	Unley
Families with teenagers	1	2	3	4	5	6
First home buyers	1	2	3	4	5	6
Older singles	1	2	3	4	5	6
Older singles or couples who are still working but without kids at home	1	2	3	4	5	6
Retirees	1	2	3	4	5	6
Professionals	1	2	3	4	5	6
Young families	1	2	3	4	5	6
Young singles	1	2	3	4	5	6

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

My house	1
We have a big block with room to move	2
We have a small low maintenance block that suits our lifestyle	3
Leafy streets	4
Close to the hills	5
Close to friends	6
Close to parks	7
Close to the beach	8
Close to family	9
Good neighbours / neighbourhood	10
Convenient for shopping	11
Convenient for schools / kindergarten / childcare for my children	12
Close to work	13
Convenient to the city	14
It is a safe and secure place to live / a place where I feel safe	15
This is the suburb that I grew up in	16
Close to entertainment and recreation facilities	17
Surrounded by attractive homes	18
Proximity to public transport	19
Close to medical facilities	20
Close to restaurants or cafes	21
Open space	22
Trees	23
Peace and quiet (tranquillity)	24
Close to where I study	25
Don't know	26
Other <i>[specify]</i>	27

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

My house	1
Not enough open space	2
Noisy and unsafe streets	3
Too far from the beach	4
Too far from the linear park	5
Too far from the hills	6
Too far from friends	7
Not enough trees	8
Not close to family	9
Unpleasant neighbourhood - specify	10
Not convenient for shopping	11
Not convenient for schools	12
Too far away from work	13
Too far from the CBD	14
Not enough entertainment and recreation facilities nearby	15
Distance from public transport	16
Surrounding homes are unattractive	17
Not convenient for restaurants or cafes	18
Traffic congestion	19
House and/or allotment too large	20
House and/or allotment too small	21
Unsafe area	22
Too far away from where I study	23
Don't know	24
Other <i>[specify]</i>	26

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

Single or double storey house – goto Q15	1
Single or multi-storey house terrace or townhouse – goto Q15	2
Single storey flat or unit – goto Q15	3
Multi-storey apartment	4
Other dwelling – goto Q15	5
Not sure – goto Q15	6

13. 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

14. 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

15. 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 Q17	3
Other tenure type	4

16. What would you estimate to be the value of your current home (interviewer to start at \$300,000)? 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

17. Which of the following statements best describes how much you know about the Adelaide CBD as a place to live? SP

I know a lot about the Adelaide CBD as a place to live	1
I know something about the Adelaide CBD as a place to live	2
I know a little about the Adelaide CBD as a place to live	3
I know very little about the Adelaide CBD as a place to live – goto Q20	4
I know nothing about the Adelaide CBD as a place to live other than the name – goto Q20	5
This is the first I have heard of the Adelaide CBD as a place to live – goto Q20	6

18. In your view, which of the following statements describe the Adelaide CBD? 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

IF ‘An attractive City to buy a home in as either option’ IS NOT SELECTED THEN:

19. Which if any of the following incentives would make the Adelaide CBD an attractive City to buy a home in either as a homeowner or investor? SP ROTATE (FORCE CHOICE)

You don't pay stamp duty on the purchase of the home	1
You don't pay any Council rates for the first 5 years of ownership	2
You get a rebate equivalent to 1% of the interest rate on your mortgage for the first year of ownership to a maximum of \$10,000	3
You get a new City homeowner grant of \$10,000	4
None of these	5

20. 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
A sense of space and openness is important to me.	1	2	3	4	5
I'd describe myself as a bit of a homebody	1	2	3	4	5
I'd describe myself as kind of adventurous and outgoing.	1	2	3	4	5
I consider myself to be a bit of a risk taker.	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'm pretty active when it comes to keeping fit or playing sport.	1	2	3	4	5
I have a clear idea of my goals in life.	1	2	3	4	5
I think most people that know me well would consider me a competitive person.	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

Keeping in close contact with my family is very important to me.	1	2	3	4	5
I see myself as a trendsetter.	1	2	3	4	5
In a group situation I often take the lead.	1	2	3	4	5
I feel really uncomfortable when I'm out of my normal environment.	1	2	3	4	5
I would prefer to live in a contemporary style, architecturally designed home.	1	2	3	4	5
I would prefer to live in a traditional style of home.	1	2	3	4	5
I would prefer to live on a large traditional block of land	1	2	3	4	5
I like the freedom of not having to comply with rules and regulations.	1	2	3	4	5
I think it's important that standards are set and enforced for new housing developments to protect my investment.	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
The idea of living in an apartment really appeals to me.	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 would prefer to live in an area where all the homes are of a similar style and quality.	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 don't think Australians are doing enough to combat climate change.	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 would be prepared to pay a premium for a house that is energy efficient.	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'm prepared to pay a premium for an upmarket brand I can trust	1	2	3	4	5
I have travelled a lot around Australia or overseas	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 would prefer to live in a development that includes the latest in environmental initiatives	1	2	3	4	5
I would prefer to live in a development that has a diverse range of architectural styles	1	2	3	4	5
The idea of living in a terrace house or townhouse really appeals 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
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
Privacy is an important consideration for me when I'm choosing somewhere to live.	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
A sense of community is an important consideration for me when I'm choosing somewhere to live.	1	2	3	4	5
I consider myself to be a cultured person	1	2	3	4	5
I consider myself to be a well-educated person	1	2	3	4	5

21. How likely would you be to purchase a new home, which could be either a brand new home or an existing home, or land at some stage during the next five years either as a place you intend to live in or as an investment? SP

Very likely	1
Likely	2
Unlikely – goto Q33	3
Not sure – goto Q33	4

22. When do you think you will be ready to purchase a new home or land? 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

23. In which of the following areas do you plan to buy this home (interviewer to exclude land only purchases)? MP

Adelaide CBD 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 CBD NOT ONE OF THE AREAS CONSIDERED:

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

	1
Don't know/not sure	2

25. Which of the following options would best match your budget if you were to consider purchasing a new home including land (interviewer to start at \$300,000 and exclude land only purchases)? 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

26. What would be your main reason for buying a new home? SP

To buy a home where I would live permanently	1
To buy a home for my retirement	2
To buy a home for investment purposes	3
To buy a home for my child or children	4
Other - specify	5

27. And what advantages would this home 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
Other - specify	7

28. 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 (specify)	1	2	3	4

Q28 to be cross- tabbed with Q25

29. In the following questions I would like to ask you about some of the features you might like in your home? 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

30. 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

FIRST TRADE-OFF QUESTION	
A large home on a smaller block of land	1
Or a small home on a larger block of land	2
Not sure	3
SECOND TRADE-OFF QUESTION	
A home with parking for two cars	4
Or a home with parking for one car and easy access to good public transport	5
Not sure	6
THIRD TRADE-OFF QUESTION	
A home on a larger block of land in the suburbs with a 30 minute drive to work	7
Or an apartment where you could walk to work	8
Not sure	9

Q31 & Q32 are to be asked of respondents who answered either very attractive or attractive to apartment living in Q28 everyone else skip to Q33

31. 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

32. 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

33. 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 q43	3
Not sure – goto q43	4

34. 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

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

Adelaide CBD 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 CBD NOT ONE OF THE AREAS CONSIDERED:

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

	1
Don't know/not sure	2

37. 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

38. 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

39. 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 (specify)	1	2	3	4

40. 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

Q41 & Q42 are to be asked of respondents who answered either very attractive or attractive to apartment living in Q39 everyone else skip to Q43

41. 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

42. 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

43. 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 – NOT RENTERS	7
Talk to family or friends	8
Visit a builders' website – NOT RENTERS	9
Other - specify	10
Not sure	11

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

44. 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

45. 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

46. 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

47. 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

48. 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