



ADELAIDE CITY LIVING MARKET RESEARCH

VOLUME 4 — INTERNATIONAL STUDENTS

Collaborative Thinking. Positive Outcomes.

A joint initiative of

CAPITAL CITY
COMMITTEE



Government of
South Australia



CITY OF
ADELAIDE

TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	3
1 INTRODUCTION	5
2 METHODOLOGY	6
3 SEGMENTATION	7
3.1 Overview.....	7
3.2 Segment Description and Market Depth	8
3.3 Segment Priorities.....	12
4 RESEARCH FINDINGS.....	14
4.1 Study Status	15
4.2 Place of Residence.....	16
4.3 Demographics.....	18
4.4 Transport Trends.....	20
4.5 Suburb Amenity Perceptions	23
4.6 Suburb Amenity – Additional Features.....	25
4.7 Attitudes to and Characteristics of Current Place of Residence	26
4.8 Apartment Living Perceptions.....	31
4.9 Current Residence - Tenure and Value	33
4.10 Rental Costs and Satisfaction	35
4.11 City Living – Knowledge and Perceptions	38
4.12 Psychographic Segmentation	41
4.13 Housing Purchase - Intentions, Budget and Features.....	42
4.14 Apartment Living - Attitudes.....	60
4.15 Renting - Intention, Budget and Features	63
4.16 Apartment Living - Attitudes (Rental).....	76
4.17 Information Sources – Residential Areas	79
4.18 Country of Citizenship, Educational Information and Future Intentions	80
4.19 Household Type, Occupation and Income	84
4.20 Social Media Use	87
APPENDIX 1: SURVEY QUESTIONNAIRE	88

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 40% of the International student 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.

A secondary market segment, the Urbanites, was also identified. This group is also interested in city and apartment living and comprises 28% of the international student market.

It is important to note that only one segmentation analysis was undertaken and that was for the Adelaide metropolitan market (Volume 1) with the three subsequent surveys utilising that analysis.

This process identified that Cosmopolitans are the segment who are most likely to be attracted to city living and have the pre-disposition to consider apartment living.

This report presents the results of the International students survey. The following provides a high level summary of the key findings of the survey results.

The international students that participated in the survey are mostly under 34 years old and from either China or Malaysia. They are mostly studying an under-graduate degree full time at either Adelaide University or the University of South Australia in the STEM or Business, Finance and Law disciplines. Around half of the students are in their **first year of study and the large majority don't have a job. Being full time students without a job, they have** very low incomes of less than \$20,000 per year.

They mostly live in suburban Adelaide and spend under 40 minutes travelling to university on public transport. However, the majority of students find the idea of living in the city attractive given their commute time. Following this, the single most important reason for choosing where they currently live is proximity to university.

This group is typically renting a unit/apartment and are usually sharing with others. They are paying less than \$200 in rent per week and on the whole, are satisfied with their current home. They claim that peace and quiet followed by proximity to public transport are things they most like about where they currently live.

Looking to the future, over half of the students would like to stay in Adelaide when they complete their studies. The majority also claim that they are likely to buy a house within the next five years, preferably in the inner suburbs of Adelaide with a likely budget of less than \$400,000 to do so. The most common reason for not choosing the Adelaide city centre as a place to live was the high cost of housing followed by a preference to live in a more peaceful environment.

While the majority are currently living in a unit or apartment, they would prefer to buy a detached house or a townhouse when they buy a home. Apartments were generally less appealing and their appeal tended to decrease as the height of the apartment buildings increased.

The type of house that appealed to most students looking to buy is a three bedroom, two bathroom with two car parking spaces, one living area and an outdoor entertainment area. However, when asked if they would prefer a home with two car parks or a home with one car park and easy access to good public transport, they chose the latter. Additionally, when asked if they would prefer a house on land in the suburbs with a 30 minute commute, or an apartment where they could walk to work, they chose the suburban house option.

Of the smaller group of students that found apartment living appealing, living close to everything and convenience generally are the two most attractive features nominated in relation to apartment living. Having no garden and the small size of apartments were some of the reasons given as the least attractive features of apartment living.

So although the students are currently renting a unit or apartment in the suburbs, when they think about buying a house at the completion of their study, they would choose to live in a traditional house in the suburbs with easy access to good public transport, with cost being a main driver for this decision.

By contrast, a large proportion of students claim that they intend to rent (not buy) a house in the next 5 years within the Adelaide city centre. The reasons for not choosing the city centre are the same as for the home purchasing group – high cost and a preference for a more tranquil environment. The rental budget for most of these students would be less than \$200 per week.

For this renting group, a townhouse is the most favoured type of home followed by a detached house. However, proportionally a three-four storey apartment was considered more attractive in this group than the home purchasing group. And although the attractiveness of apartments also decreased as the building increased in height, they are more likely to consider this option. They were also more likely to prefer a smaller home with two bedrooms, two bathrooms and one car park. An outdoor entertainment area is however still highly desirable.

When researching the area they would choose to live in, the large majority would visit www.realestate.com. Talking to family and friends and doing a general internet search was also a popular researching method.

In terms of social media, the large majority of the students use Facebook, You Tube and Instagram at least one a week.

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 International students survey (Volume 4).

2 METHODOLOGY

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

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

A questionnaire was developed for the international students survey (Appendix 1), based on the format of the survey for the Adelaide metropolitan market survey (Volume 1). The sample size was 120 incorporating an online survey with all respondents being adult full-time or part-time students.

A sample size of 120 provides a confidence interval (also called margin of error) of plus-or-minus 9% and a 95% confidence level. This means that if 50% of the sample selected a given answer you can be confident that if this question had been asked of the relevant population between 41% (50-9) and 59% (50+9) would have picked that answer.

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

The international students survey incorporated a psychographic segmentation of the market based on the segmentation solution used for the Adelaide metropolitan market survey (Volume 1). Through this process six segments were identified and given a descriptive label: Cosmopolitans, Homebodies, Traditionalists, Urbanites, Suburbanites and Diffidents.

3 SEGMENTATION

3.1 Overview

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

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

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

The following table highlights the change in size of each of the segments as compared to the Adelaide metropolitan market survey with the most significant changes being higher percentages of Cosmopolitans and Urbanites and smaller percentages of Homebodies, Traditionalists and Suburbanites.

Segment	Adelaide Metropolitan Market Survey	International Students Survey	% Change
Segment 1 — Cosmopolitans	24%	40%	+16%
Segment 2 — Homebodies	23%	12%	-11%
Segment 3 — Traditionalists	14%	8%	-8%
Segment 4 — Urbanites	9%	28%	+19%
Segment 5 — Suburbanites	21%	5%	-16%
Segment 6 — Diffidents	9%	7%	-2%

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

3.2 Segment Description and Market Depth

The following contains the six segment descriptions as they specifically relate to the international student market. As this survey has a sample size of only 120 respondents (as opposed to 1,000 in the Adelaide metropolitan market survey), caution should be exercised when interpreting the results at the individual segment level.

Cosmopolitans – 40%

The Cosmopolitans is the largest of the six segments at 40%.

Along with the Urbanites, the Cosmopolitans find the idea of living in or close to the city appealing (90% compared to 85% of the total sample). They also share the Urbanites appetite for medium and higher density residential living claiming that living in an apartment is appealing (67% compared to 61% of the total sample).

The Cosmopolitans are so named because of their cosmopolitan outlook on life. This is evidenced by their adventurous and outgoing nature (89% compared to 77% of the total sample) and their interest in living in an area where there is a mix of people from different backgrounds (83% compared to 73% of the total sample).

Importantly, they are also confident (77% compared to 74% of the total sample) and have a clear idea of their goals in life (81% compared to 80% of the total sample).

The Cosmopolitans also show an interest in sustainability preferring to live in a development with the latest in environmental initiatives (77% compared to 74% of the total sample), are prepared to pay a premium for an energy efficient house (54% compared to 53% of the total sample) and are more likely to walk or ride their bike in preference to using their car (85% compared to 74% of the total sample).

The Cosmopolitans are more likely to take risks (83% compared to 73% of the total sample), be competitive (69% compared to 61% of the total sample) and a sense of community is important to them when they are choosing somewhere to live (88% compared to 84% of the total sample)

The Cosmopolitans are less likely to:

- Describe themselves as a homebody (44% compared to 65% of the total sample)
- Feel uncomfortable when they are out of their normal environment (19% compared to 35% of total sample)
- Prefer to live in an area where most of the people come from backgrounds similar to their own (6% compared to 28% of total sample)
- Prefer to live in an area where all of the homes are of a similar style and quality (29% compared to 46% of total sample)

In summary, at 40% of the overall sample, the Cosmopolitans rate highly as a primary market segment. They are engaged, active, confident, leaders who should respond very favourably to a carefully developed and implemented Adelaide city centre residential brand proposition.

Homebodies – 12%

The Homebodies represent 12% of the survey sample.

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

The vast majority of Homebodies:

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

The Homebodies are less inclined to:

- Describe themselves as adventurous and outgoing
- Take the lead in a group situation
- Have travelled a lot around Australia or overseas
- Consider themselves to be competitive
- Consider themselves to be confident
- Take risks
- Be active when it comes to keeping fit or playing sport
- Have a clear idea of their goals in life
- Consider themselves to be cultured
- Consider themselves to be a trendsetter
- Consider themselves to be well-educated
- Walk or ride a bike in preference to using their car
- Be more concerned with what they think than what other people think of them
- Prefer to live in a contemporary style, architecturally designed home

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

In summary, the international **students' market contains a small percentage of Homebodies. They are ranked as a tertiary market segment as potential Adelaide residents.**

Traditionalists – 8%

The Traditionalists represent just 8% of the survey sample. The Traditionalists are so named because of the six segments, this group has a high percentage of people who would prefer to live on a large traditional block of land and a similarly high percentage of people who would prefer to live in a traditional style of home.

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

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

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

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

The vast majority of Traditionalists:

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

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

Urbanites – 28%

The Cosmopolitans dominate in this segmentation analysis followed by the Urbanites representing 28% of the survey sample. The Urbanites are so named because the vast majority of the members of this segment are attracted to the idea of city or near-city living or in higher density developments such as apartments and terrace / townhouses.

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

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

The vast majority of Urbanites:

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

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

In summary, at 28% of the overall sample the Urbanites rate as a secondary market segment for Adelaide residential living and are attractive because of their strong interest in urban and higher density living.

Suburbanites – 5%

The Suburbanites represent just 5% of the survey sample. The Suburbanites are so named because of the six segments, this group has a high percentage of people who might be described as having 'suburban' attitudes. They have an appetite for a traditional home on a large traditional block of land and they are adventurous, outgoing, confident and competitive.

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

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

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

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

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

The Suburbanites are also less inclined to:

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

Not surprisingly the Suburbanites are less inclined to prefer to:

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

The vast majority of Suburbanites:

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

- Consider that safety and security is an important consideration when choosing somewhere to live

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

Diffidents – 7%

The Diffidents represent just 7% of the survey sample. The Diffidents are so named because of the six segments, this group has by far the highest percentage of people who have minimal interest in community, a low level of interest in keeping in close contact with their family, a low level of confidence and are generally neither adventurous nor outgoing.

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

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

3.3 Segment Priorities

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

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

The segment priorities as they relate to the international student market has been identified as follows:

- | | |
|----------------------------------|-------------------------|
| ➤ Segment 1 — Cosmopolitans 40% | Primary Target Market |
| ➤ Segment 2 — Homebodies 12% | Tertiary Market |
| ➤ Segment 3 — Traditionalists 8% | Tertiary Market |
| ➤ Segment 4 — Urbanites 28% | Secondary Target Market |
| ➤ Segment 5 — Suburbanites 5% | Tertiary Market |
| ➤ Segment 6 — Diffidents 7% | Tertiary Market |

It is very encouraging that the segmentation of the international students market shows that the size of the primary target market, the Cosmopolitans, is the largest of the six market segments by a significant margin.

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

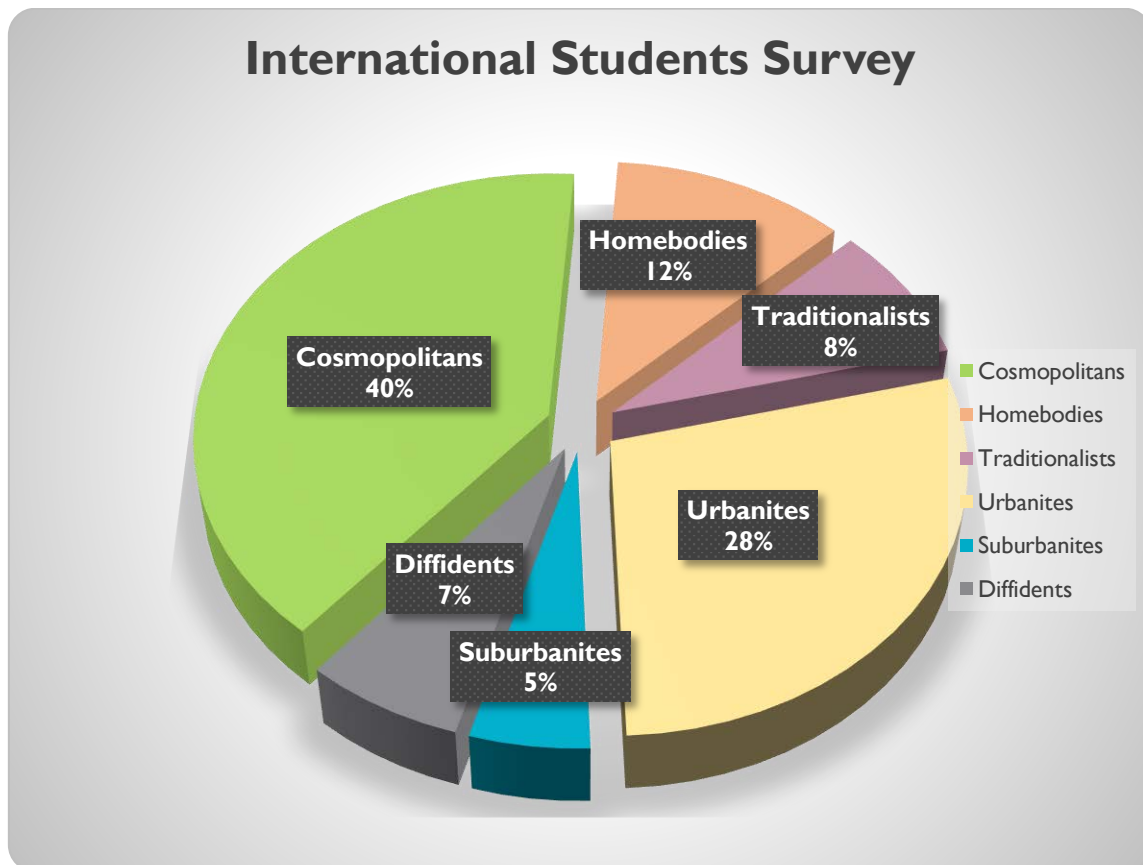
Segment Snapshot – International Students		Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
	TOTAL						
<i>(caution – small sample size n = 120)</i>	100%	40%	12%	8%	28%	5%	7%
Own home outright	3%	0%	0%	0%	9%	0%	0%
Own with mortgage	4%	0%	7%	0%	9%	0%	13%
Rent but don't share with others	13%	2%	21%	20%	18%	17%	25%
Rent and share with others	58%	71%	57%	50%	44%	67%	50%
Rent through university managed	18%	23%	7%	30%	21%	0%	0%
Know at least a little about Adelaide as a place to live	91%	94%	85%	90%	91%	100%	76%
Adelaide – a Beautiful City	49%	48%	29%	50%	53%	83%	50%
Adelaide – a Liveable City	55%	63%	43%	50%	56%	33%	50%
Plan to buy a home in next 5 years	64%	52%	79%	70%	71%	83%	63%
Plan to buy this home in the city centre (n=77)	18%	12%	9%	14%	33%	0%	20%
Gender – female	63%	54%	71%	70%	68%	83%	63%
Age 18 to 39	95%	90%	100%	100%	97%	100%	100%
Full time student with a job	25%	27%	0%	30%	29%	33%	25%
Full time student without a job	71%	69%	93%	70%	68%	67%	63%
Household income <\$40,000	77%	73%	78%	70%	82%	100%	76%
Household income \$40,000+	6%	6%	0%	10%	3%	0%	13%

In summary, at 40% of the overall sample, the Cosmopolitans rate highly as a primary market segment. They are engaged, confident, leaders with a strong interest in city living who should respond very favourably to a carefully developed and implemented Adelaide city centre residential brand proposition. The Urbanites, at 28% of the overall sample, rate as a secondary market segment for Adelaide residential living and are attractive because of their strong interest in urban and higher density living.

4 RESEARCH FINDINGS

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

As detailed in Section 2, a total of 120 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.

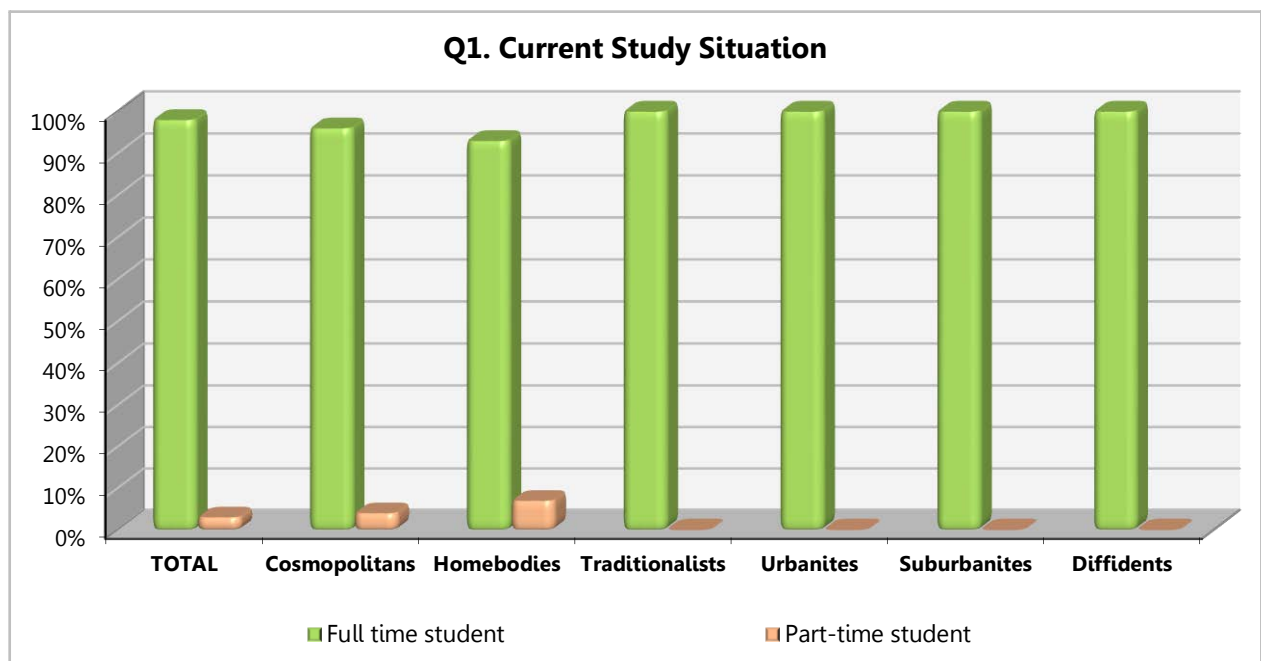
Also, there are some instances where the aggregate of two percentages sums to either + or - 1% of the aggregated figure. This is a result of the rounding of decimal places.

The first five 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 Study Status

Question 1 - Which of the following categories best describes your current study situation?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
Full time student	98%	96%	93%	100%	100%	100%	100%
Part-time student	3%	4%	7%	0%	0%	0%	0%



The vast majority of total respondents are full-time international students (98%) with the remainder being part-time international students.

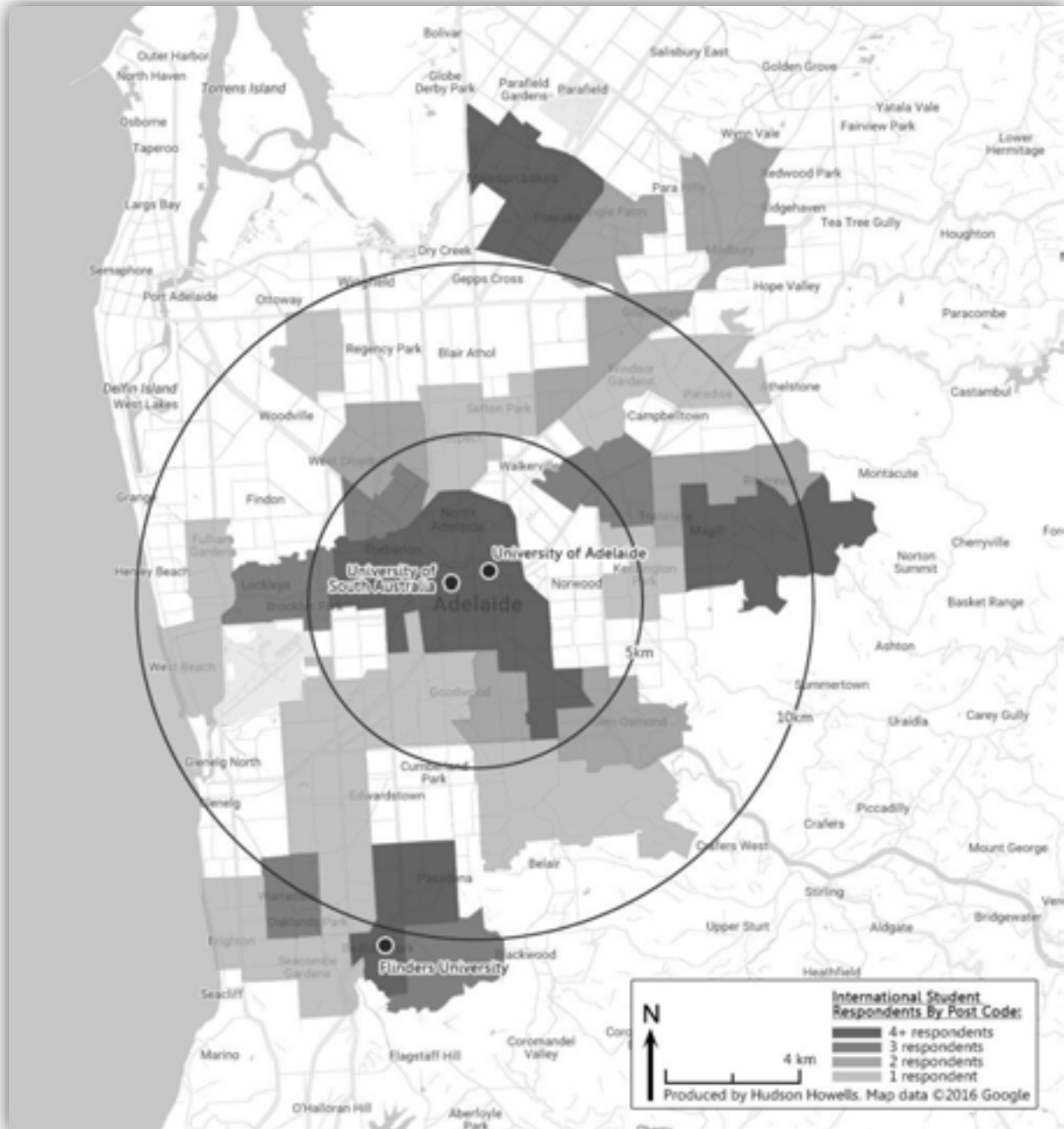
Question 2 - Are you an international student?

This question was asked of survey respondents as a screening question, with all respondents participating in the survey being international students.

4.2 Place of Residence

Question 3 - 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)?

The following map highlights the location of residence for respondents by postcode. We note that 44 (37%) of the respondents reside in Adelaide (postcode 5000).

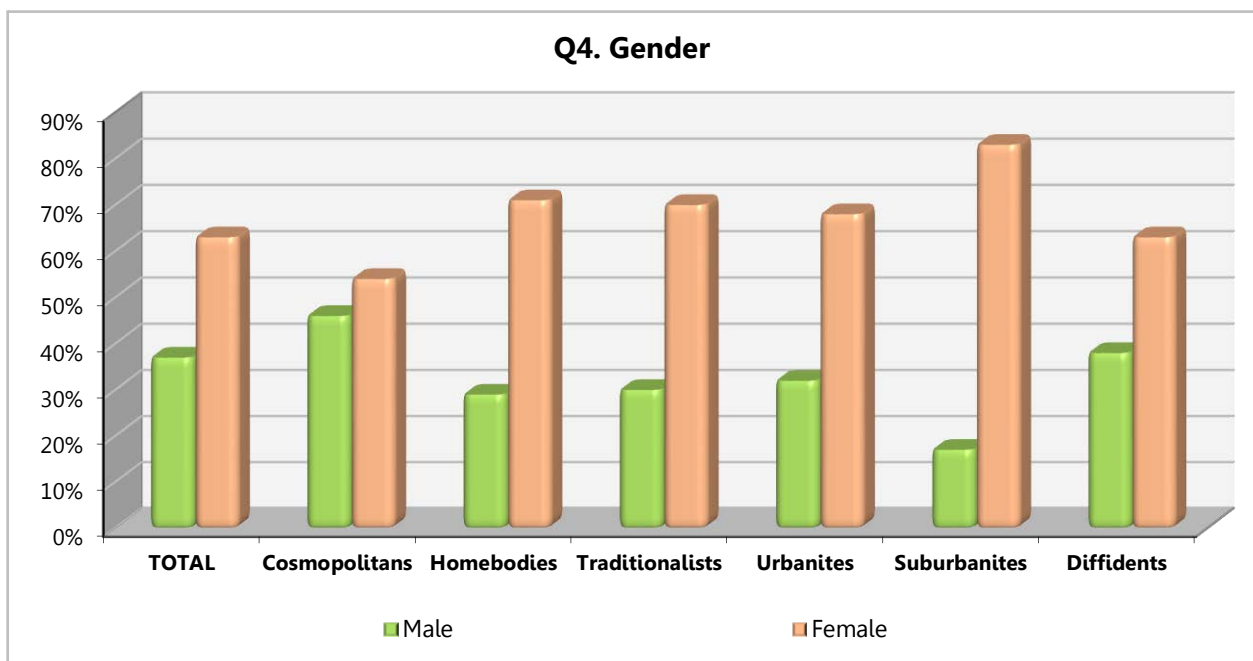


No. of Respondents	Post Code	Suburbs
4+ respondents	5000 (x44)	Adelaide
	5006 (x8)	North Adelaide
	5031 (x5)	Mile End, Mile End South, Thebarton, Torrensville
	5063 (x5)	Eastwood, Frewville, Fullarton, Highgate, Parkside
	5095 (x5)	Mawson Lakes, Pooraka
	5042 (x4)	Bedford Park, Clovelly Park, Pasadena, St Marys
	5072 (x4)	Auldana, Magill, Rosslyn Park, Skye
3 respondents	5007 (x3)	Bowden, Brompton, Hindmarsh, Welland, West Hindmarsh
	5032 (x3)	Brooklyn Park, Lockleys, Underdale
	5046 (x3)	Oaklands Park, Warradale, Warradale North
	5050 (x3)	Bellevue Heights, Eden Hills
	5070 (x3)	Felixstow, Firle, Glynde, Joslin, Marden, Payneham, Payneham South, Royston Park
2 respondents	5008 (x2)	Croydon, Croydon Park, Devon Park, Dudley Park, Renown Park, Ridleyton, West Croydon
	5061 (x2)	Hyde Park, Malvern, Unley, Unley Park
	5064 (x2)	Glen Osmond, Glenunga, Mount Osmond, Myrtle Bank, St Georges, Urrbrae
	5073 (x2)	Hectorville, Rostrevor, Tranmere, Tranmere North
	5086 (x2)	Gilles Plains, Greenacres, Hampstead Gardens, Hillcrest, Manningham, Oakden
	5092 (x2)	Modbury, Modbury Heights, Modbury North
	5098 (x2)	Ingle Farm, Walkley Heights
1 respondent	5012, 5024, 5034, 5035, 5037, 5038, 5043, 5047, 5048, 5062, 5068, 5075, 5082, 5083, 5087, 5118	

4.3 Demographics

Question 4 - Gender

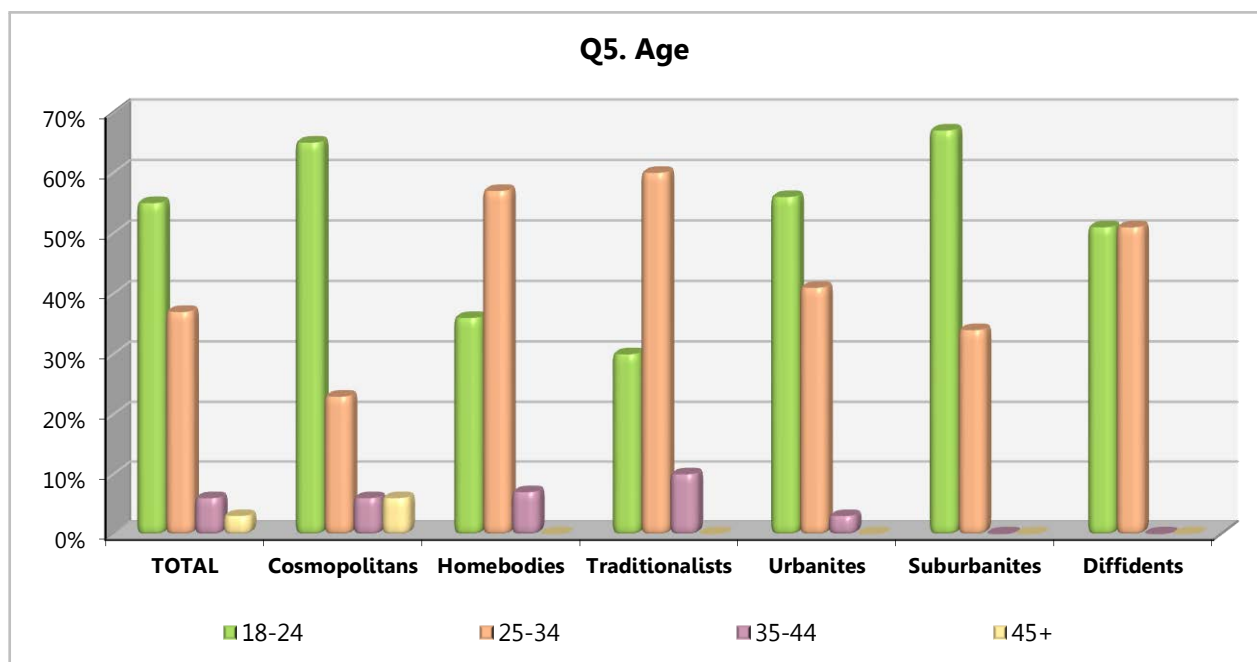
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
Male	37%	46%	29%	30%	32%	17%	38%
Female	63%	54%	71%	70%	68%	83%	63%



Just over a third (37%) of total respondents are male with 63% being female.

Question 5 - Which of the following age categories are you in?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
18 to 20	16%	21%	7%	0%	18%	17%	13%
21 to 24	39%	44%	29%	30%	38%	50%	38%
25 to 29	24%	15%	57%	10%	26%	17%	38%
30 to 34	13%	8%	0%	50%	15%	17%	13%
35 to 39	3%	2%	7%	10%	0%	0%	0%
40 to 44	3%	4%	0%	0%	3%	0%	0%
45 to 49	1%	2%	0%	0%	0%	0%	0%
50 or over	2%	4%	0%	0%	0%	0%	0%



The vast majority (92%) of international students are between 18 and 34 years of age:

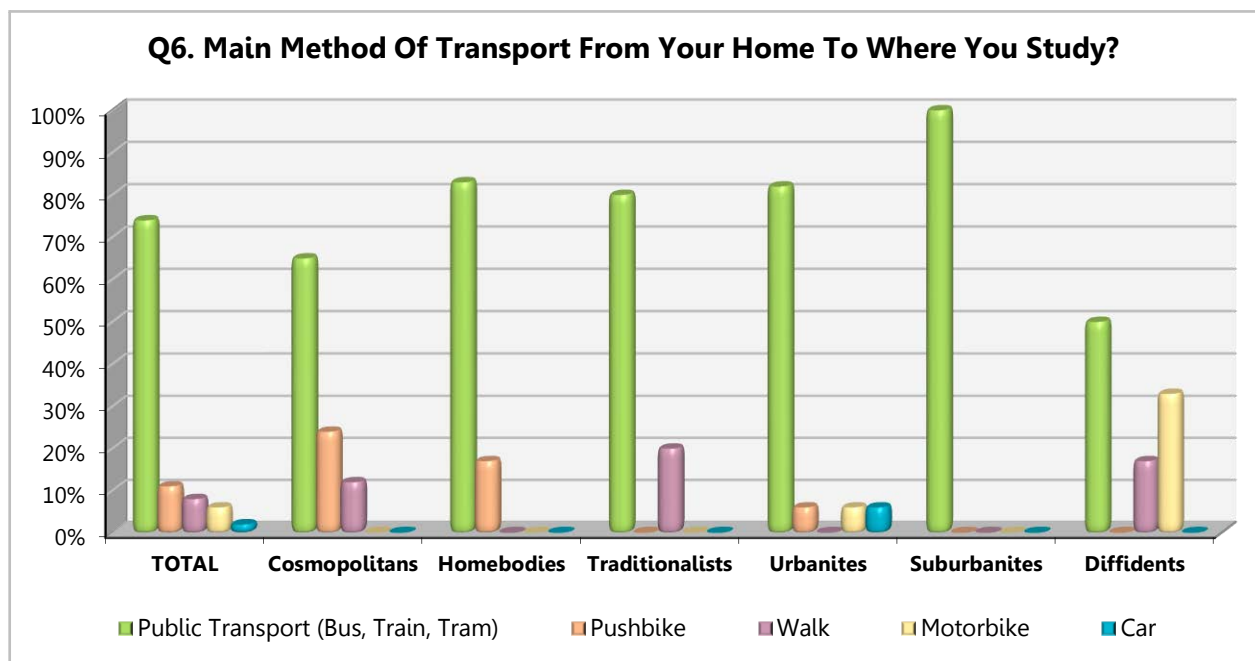
- > 18 to 34 years – 92%
- > 35 to 49 years – 7%
- > 50 years or more – 2%

4.4 Transport Trends

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

Question 6 - What is your main method of transport from your home to where you study?

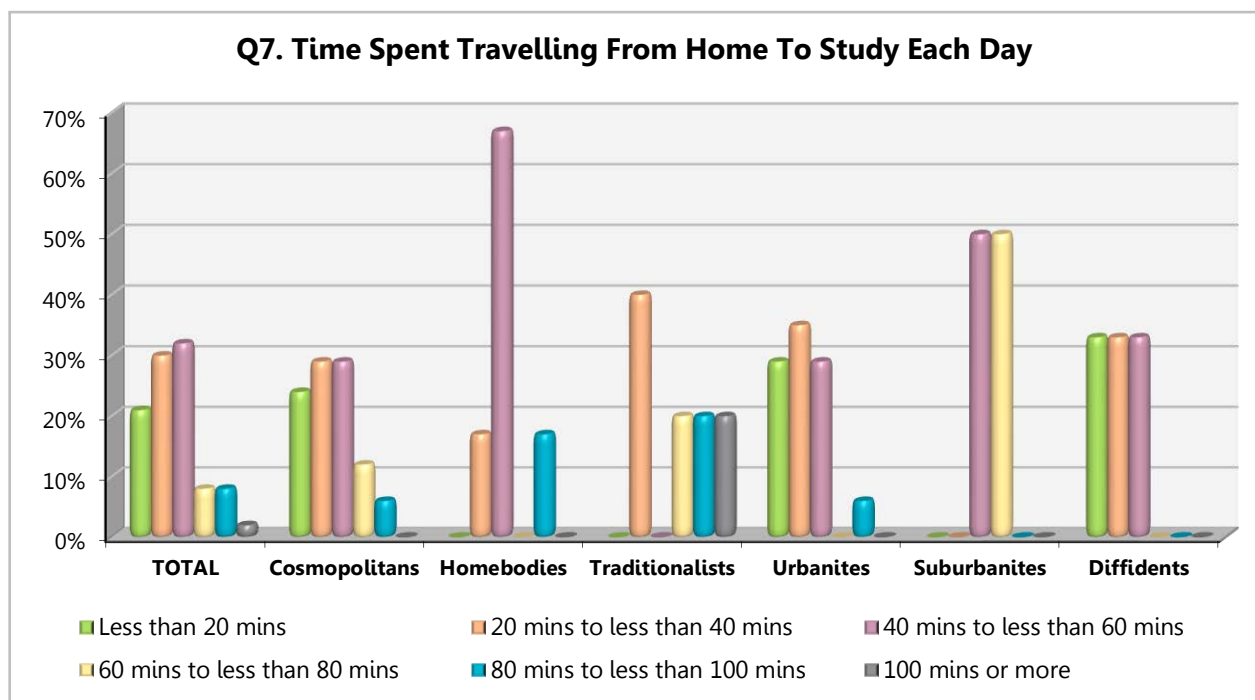
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	53	17	6	5	17	2	6
Public Transport (Bus, Train, Tram)	74%	65%	83%	80%	82%	100%	50%
Pushbike	11%	24%	17%	0%	6%	0%	0%
Walk	8%	12%	0%	20%	0%	0%	17%
Motorbike	6%	0%	0%	0%	6%	0%	33%
Car	2%	0%	0%	0%	6%	0%	0%



This question was asked of those respondents whose postcode for their primary place of study location is 5000 and their primary residence is not 5000 (44% of the total sample). Nearly three-quarters of these respondents catch public transport to their place of study (74%), a further 11% ride a pushbike, 8% walk, 6% ride a motorbike and just 2% drive a car.

Question 7 - Approximately how much time do you spend travelling from your home to where you study each day including the return trip?

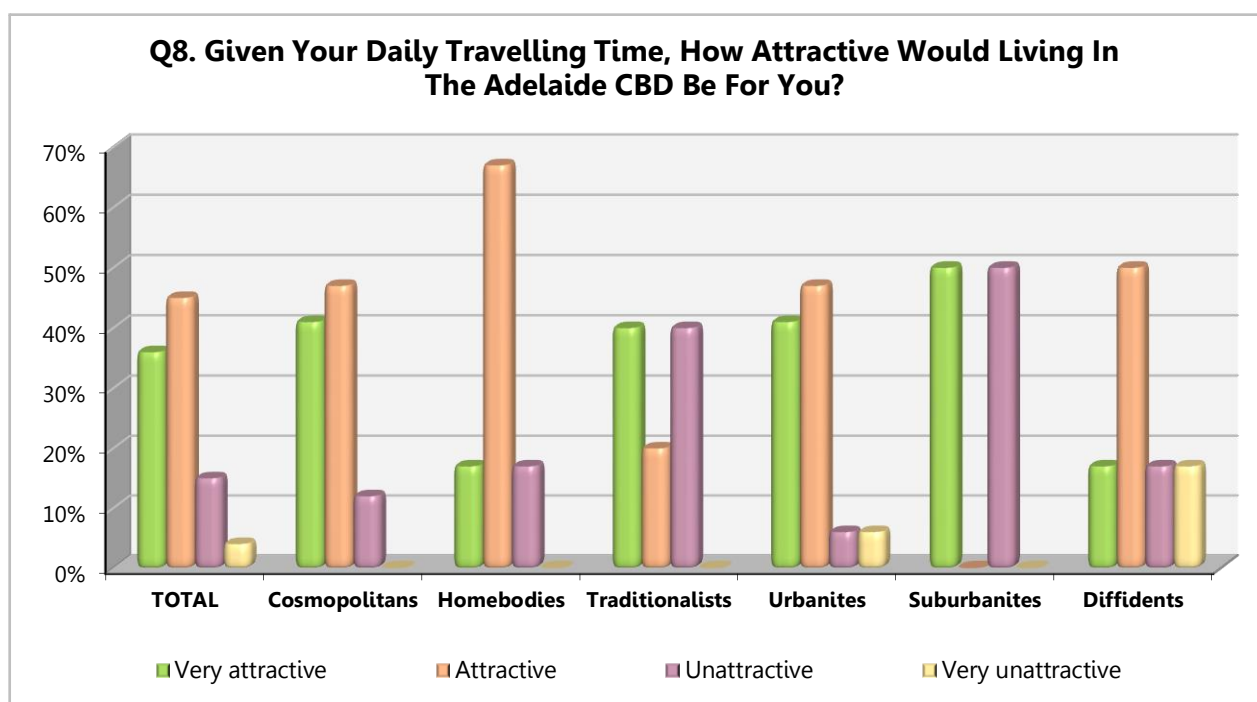
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	53	17	6	5	17	2	6
Less than 20 mins	21%	24%	0%	0%	29%	0%	33%
20 mins to less than 40 mins	30%	29%	17%	40%	35%	0%	33%
40 mins to less than 60 mins	32%	29%	67%	0%	29%	50%	33%
60 mins to less than 80 mins	8%	12%	0%	20%	0%	50%	0%
80 mins to less than 100 mins	8%	6%	17%	20%	6%	0%	0%
100 mins or more	2%	0%	0%	20%	0%	0%	0%



Over half of those respondents who live outside of the Adelaide city centre and travel to study within the city centre spend less than 40 minutes travelling to study and home again each day (51%). A very small proportion of these respondents spend over 100 minutes every day travelling to their place of study (2%).

Question 8 - 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	53	17	6	5	17	2	6
Very attractive	36%	41%	17%	40%	41%	50%	17%
Attractive	45%	47%	67%	20%	47%	0%	50%
Unattractive	15%	12%	17%	40%	6%	50%	17%
Very unattractive	4%	0%	0%	0%	6%	0%	17%



Over three-quarters of those respondents who live outside of the Adelaide city centre and travel to study within the city centre claim living in the Adelaide CBD would be an attractive option (36% very attractive, 45% attractive) given their daily travelling time.

4.5 Suburb Amenity Perceptions

Question 9 - I would now like to seek your opinion on a series of features that could apply to any area you might choose to live in. Please read each feature and then indicate 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.

Then please indicate whether you think this feature applies to the Adelaide CBD.

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

The following table indicates the attributes ranked by importance (mean score) by respondents and whether respondents think the feature applies to the Adelaide CBD. This table has been sorted by how important that feature would be if the respondent was choosing an area to live. **'Applies to Adelaide'** percentages of 65% or more are highlighted in yellow text with a blue background with scores of 35% or less being highlighted in green text on a yellow background.

	Mean Score (1 to 10)	Feature Applies to Adelaide		
	Importance in choosing an area to live	Applies	Doesn't Apply	Don't know
A safe & secure place to live	9.2	70%	18%	13%
Convenient public transport	8.9	91%	8%	1%
Convenient for universities	8.6	89%	9%	2%
Easy to walk around	8.6	94%	4%	2%
Convenient for weekly shopping	8.3	93%	5%	3%
A vibrant & lively place to live	7.7	83%	12%	5%
A tranquil place to live	7.7	43%	47%	11%
Medical facilities and services	7.6	82%	9%	9%
Specialty shops such as a butcher, greengrocer & newsagent	7.2	78%	12%	10%
Lots of parks with trees	7.2	62%	32%	7%
Cafes & restaurants	7.1	92%	6%	3%
Access to recreation facilities	7.0	77%	13%	10%
Access to a range of entertainment options	6.9	88%	10%	3%
Access to sporting facilities	6.8	67%	21%	13%
Convenient car parking	6.6	30%	51%	19%
Access to interesting festivals & events	6.6	88%	8%	4%
Public libraries	6.6	83%	8%	9%
Bike friendly	6.5	62%	24%	14%
Tree lined streets	6.5	62%	28%	10%
Safe areas for children to play outdoors	6.1	39%	35%	26%
A good place to bring up kids	5.7	42%	33%	26%
Convenient for public schools	5.7	31%	22%	48%
A good place to buy an investment property	5.6	59%	20%	21%
A premium address	5.2	68%	9%	23%
Childcare facilities	4.8	33%	21%	47%
Convenient for private schools	4.7	29%	25%	46%

The eight most important features for choosing any area as a place to live (mean score of 7.5 or more out of a possible 10) are followed by the percentage of agreement that this feature applies to the Adelaide city centre:

- A safe and secure place to live - importance 9.2 – applies to Adelaide city centre 70%
- Convenient public transport - importance 8.9 – applies to Adelaide city centre 91%
- Convenient for universities - importance 8.6 – applies to Adelaide city centre 89%
- Easy to walk around - importance 8.6 – applies to Adelaide city centre 94%
- Convenient for weekly shopping - importance 8.3 – applies to Adelaide city centre 93%
- A tranquil place to live - importance 7.7 – applies to Adelaide city centre 43%
- A vibrant and lively place to live - importance 7.7 – applies to Adelaide city centre 83%
- Medical facilities and services - importance 7.6 – applies to Adelaide city centre 82%

4.6 Suburb Amenity – Additional Features

Question 10 - 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?

Respondents were asked if there were any additional features they would like included in an area they would choose to live that were not covered in the previous question. Additional features nominated by respondents include those outlined in the table below:

Additional Features Would Like To See Included In Area Choose To Live			
Clean and Safe Environment Access to police and emergency services, minimal pollution, good learning environment 7	Affordable and quality rentals Reasonable rents, noise mitigated, places to hang out washing 8	Community Lots of residents to make a community, pet friendly places, small neighbourhood parks, sense of belonging 5	Good Transport Options Convenient transport, midnight bus, reasonable parking fees, easy access, more bike parking 5
Entertainment and events Entertainment centre, pop up markets, tours 3	Access to the beach 2	Access to Asian supermarkets 2	Access to casual jobs 2

4.7 Attitudes to and Characteristics of Current Place of Residence

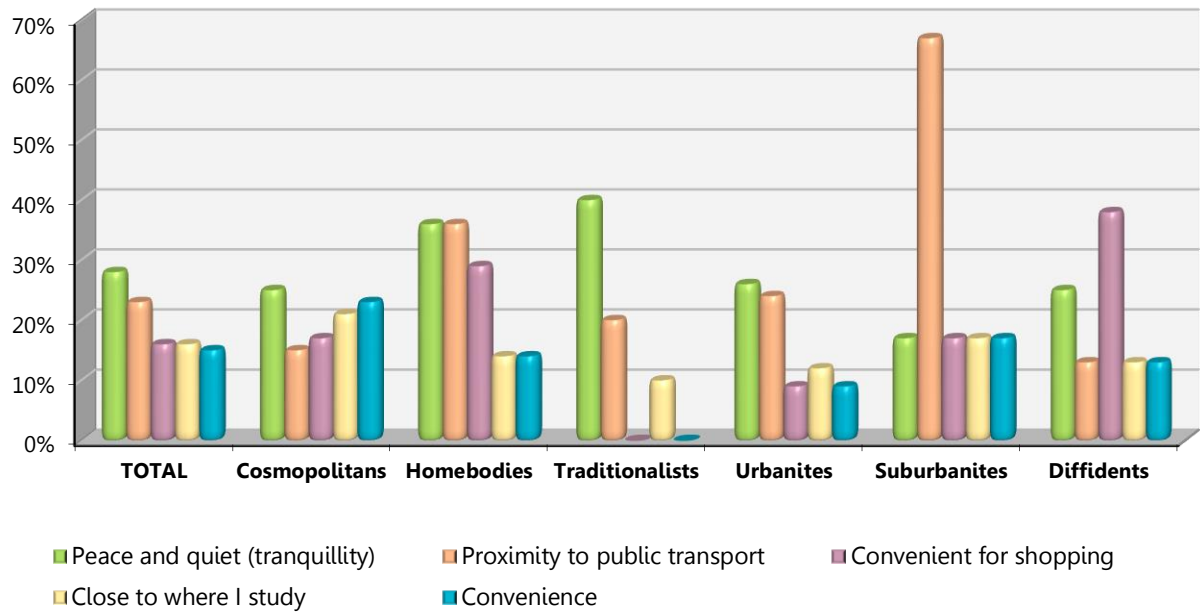
Question 11 - What do you most like about where you currently live?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	120	48	14	10	34	6	8
Peace and quiet (tranquillity)	28%	25%	36%	40%	26%	17%	25%
Proximity to public transport	23%	15%	36%	20%	24%	67%	13%
Convenient for shopping	16%	17%	29%	0%	9%	17%	38%
Close to where I study	16%	21%	14%	10%	12%	17%	13%
Convenience	15%	23%	14%	0%	9%	17%	13%
It is a safe and secure place to live / a place where I feel safe	14%	17%	0%	20%	15%	17%	13%
Convenient to the city	10%	19%	0%	0%	9%	0%	0%
Affordable/cheap rent	9%	13%	14%	0%	9%	0%	0%
Close to entertainment and recreation facilities	6%	4%	7%	10%	6%	0%	13%
Location/area (General mention)	6%	0%	7%	0%	12%	17%	13%
Close to restaurants or cafes	4%	2%	7%	10%	6%	0%	0%
My house	3%	4%	0%	0%	3%	0%	0%
Close to parks	3%	6%	7%	0%	0%	0%	0%
Open space	3%	0%	7%	10%	0%	0%	13%
Close to everything (General mention)	3%	2%	0%	20%	3%	0%	0%
Good neighbours/neighbourhood	2%	2%	0%	0%	3%	0%	0%
Close to the hills	1%	2%	0%	0%	0%	0%	0%
Close to the beach	1%	0%	0%	10%	0%	0%	0%
Close to work	1%	0%	7%	0%	0%	0%	0%
Trees	1%	2%	0%	0%	0%	0%	0%
Weather/climate/flood free	1%	2%	0%	0%	0%	0%	0%

When asked what they most like about where they currently live 'Peace and quiet' (28%) and 'Proximity to public transport' (23%) were the most frequently nominated **reason for total respondents**. 'Convenient for shopping' (16%), 'Close to where I study' (16%) and 'Convenience' (15%) were also frequently nominated by total respondents.

Please refer to the chart on the following page.

Q11. Most Like About Where You Currently Live? - Top 5

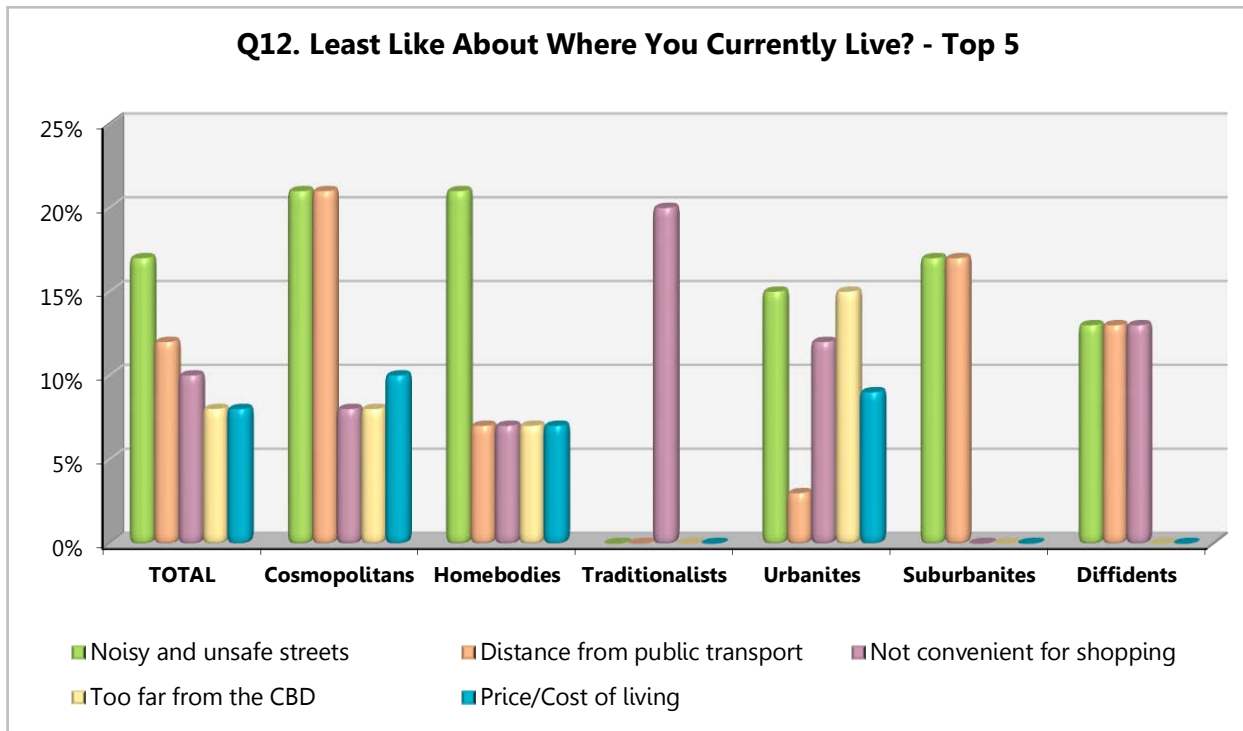


Question 12 - What do you least like about where you currently live?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
Noisy and unsafe streets	17%	21%	21%	0%	15%	17%	13%
Distance from public transport	12%	21%	7%	0%	3%	17%	13%
Not convenient for shopping	10%	8%	7%	20%	12%	0%	13%
Too far from the CBD	8%	8%	7%	0%	15%	0%	0%
Price/Cost of living	8%	10%	7%	0%	9%	0%	0%
Poor infrastructure (poor maintenance and upkeep)	8%	8%	0%	20%	9%	17%	0%
Unfriendly/annoying/undesirable neighbours	7%	2%	7%	0%	12%	0%	25%
Not enough entertainment and recreation facilities nearby	6%	8%	7%	0%	3%	0%	13%
Too far away from where I study	6%	6%	7%	0%	3%	0%	25%
Traffic congestion	4%	2%	0%	30%	0%	0%	13%
Not convenient for restaurants or cafes	3%	4%	0%	10%	0%	0%	0%
House and/or allotment too small	3%	0%	21%	0%	0%	17%	0%
Lack of convenience to anything (General mention)	3%	4%	0%	0%	3%	0%	0%
Lack of parking spaces available	3%	2%	0%	0%	9%	0%	0%
Not convenient for schools	2%	0%	0%	0%	0%	33%	0%
Unsafe area	2%	0%	7%	0%	0%	17%	0%
Location/area (General mention)	2%	0%	7%	0%	3%	0%	0%
My house	1%	0%	0%	0%	3%	0%	0%
Not enough open space	1%	2%	0%	0%	0%	0%	0%
Poor/bad weather conditions	1%	0%	0%	0%	3%	0%	0%
Unemployment concerns, i.e. lack of jobs	1%	0%	7%	0%	0%	0%	0%
Ethnic population/cultural issues/racism	1%	2%	0%	0%	0%	0%	0%
Nothing - I don't dislike anything about where I currently live	11%	10%	0%	30%	15%	0%	0%

When asked what they least like about where they currently live 'Noisy and unsafe streets' **was the most** frequently nominated reason for total respondents (17%). 'Distance from public transport' (12%) **and** 'Not convenient for shopping' (10%) were also nominated by total respondents.

Please refer to the chart on the following page.



Question 13 - What is the single most important reason for choosing where you currently live?

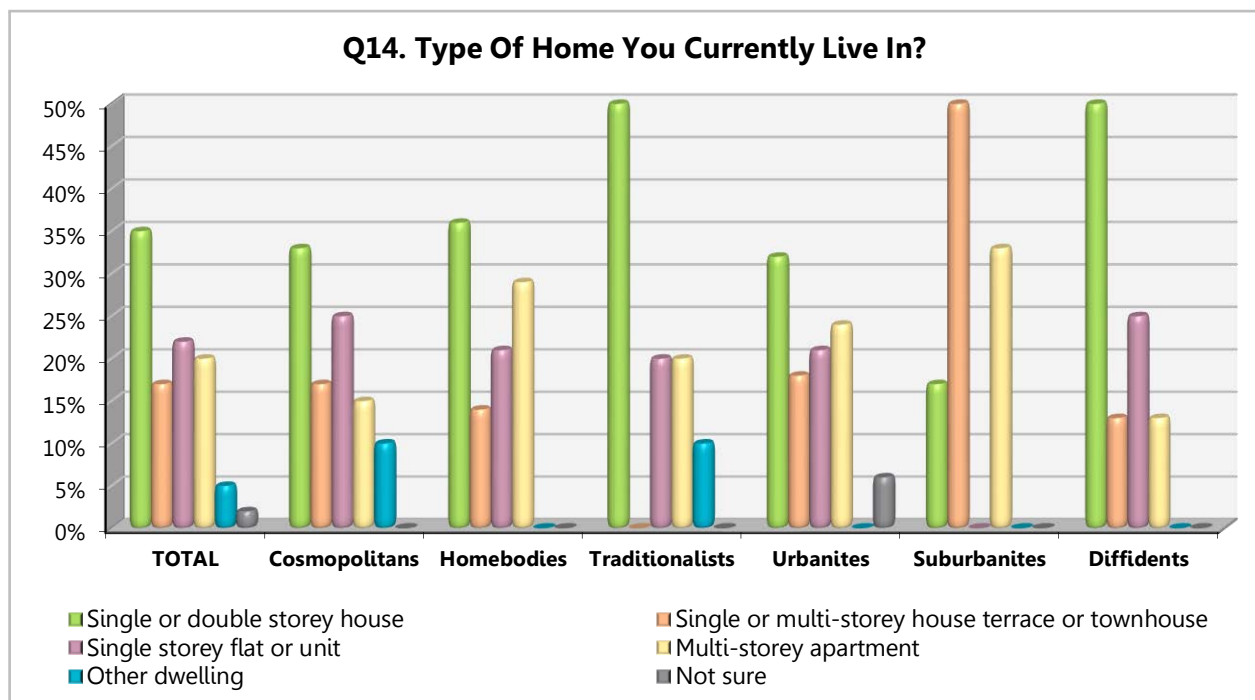
Respondents were asked what the single most important reason for choosing where they currently live is, with the most nominated reason given by respondents as the distance to university (x20). Other popular reasons provided include cheap rent (x12), convenience (x8), and safety/security (x7).

Additional reasons nominated by respondents include:

Additional Reasons For Choosing Where To Live			
Convenience and accessibility	Affordability and Good Value for Money	Quiet and Safe	Relationships
Access to the city, public transport (bus, train, tram), shops, schools, university, work, easy to walk around	Cost, price, cheap and affordable, low living expenses, fully furnished and fully equipped, quality of property	Good study environment, atmosphere, good neighbourhood, safety	Friends, friends recommendation, family, partner lives here
36	22	11	5

Question 14 - Which of the following best describes the type of home you currently live in?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	120	48	14	10	34	6	8
Single or double storey house	35%	33%	36%	50%	32%	17%	50%
Single or multi-storey house terrace or townhouse	17%	17%	14%	0%	18%	50%	13%
Single storey flat or unit	22%	25%	21%	20%	21%	0%	25%
Multi-storey apartment	20%	15%	29%	20%	24%	33%	13%
Other dwelling	5%	10%	0%	10%	0%	0%	0%
Not sure	2%	0%	0%	0%	6%	0%	0%

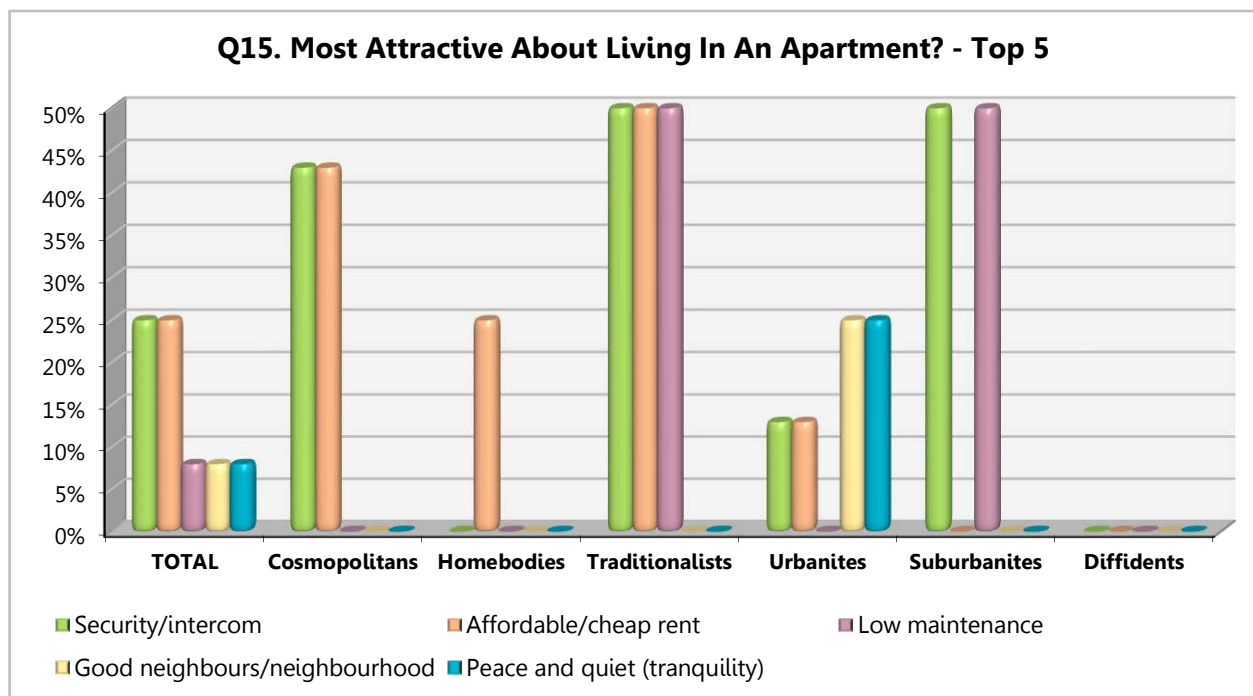


Over a third of total respondents (35%) stated they are currently living in a single or double storey house. Single storey flats or units and multi-storey apartments are also popular dwelling choices (22% and 20% respectively).

4.8 Apartment Living Perceptions

Question 15 - What do you find most attractive about living in an apartment?

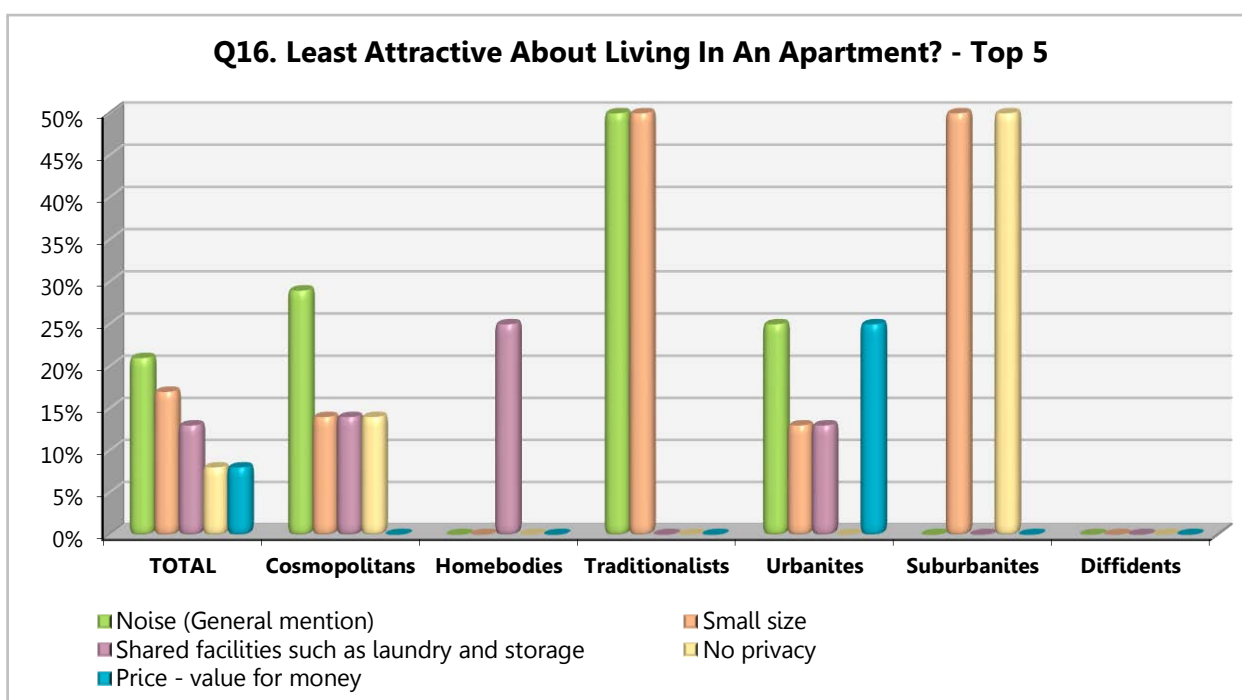
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample)	24	7	4	2	8	2	1
Security/intercom	25%	43%	0%	50%	13%	50%	0%
Affordable/cheap rent	25%	43%	25%	50%	13%	0%	0%
Low maintenance	8%	0%	0%	50%	0%	50%	0%
Good neighbours/neighbourhood	8%	0%	0%	0%	25%	0%	0%
Peace and quiet (tranquillity)	8%	0%	0%	0%	25%	0%	0%
Location/area (General mention)	8%	14%	25%	0%	0%	0%	0%
No garden	4%	0%	0%	0%	13%	0%	0%
Convenient to shopping	4%	0%	0%	0%	13%	0%	0%
Close to everything/convenience	4%	0%	0%	0%	13%	0%	0%
Modern/new	4%	14%	0%	0%	0%	0%	0%
Administration	4%	0%	25%	0%	0%	0%	0%
Fully furnished	4%	0%	0%	0%	0%	0%	100%



This question was asked of those respondents who indicated they live in a multi-storey apartment. Please note this is a small sample size so caution should be exercised in interpreting the findings. Security/intercom for entry and affordable/cheap rent are the most attractive features for 25% of these respondents respectively.

Question 16 - And what would you find least attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size (caution small sample)	24	7	4	2	8	2	1
Noise (General mention)	21%	29%	0%	50%	25%	0%	0%
Small size	17%	14%	0%	50%	13%	50%	0%
Shared facilities such as laundry and storage	13%	14%	25%	0%	13%	0%	0%
No privacy	8%	14%	0%	0%	0%	50%	0%
Price - value for money	8%	0%	0%	0%	25%	0%	0%
No garden	4%	0%	25%	0%	0%	0%	0%
Noise from other apartments	4%	0%	0%	0%	13%	0%	0%
High strata fees	4%	14%	0%	0%	0%	0%	0%
Can't have a pet	4%	0%	0%	0%	0%	0%	100%
Lack of car parking for visitors	4%	0%	0%	0%	13%	0%	0%
Neighbours (General mention)	4%	0%	25%	0%	0%	0%	0%
Stairs/no lift	4%	0%	25%	0%	0%	0%	0%
Don't know	4%	14%	0%	0%	0%	0%	0%

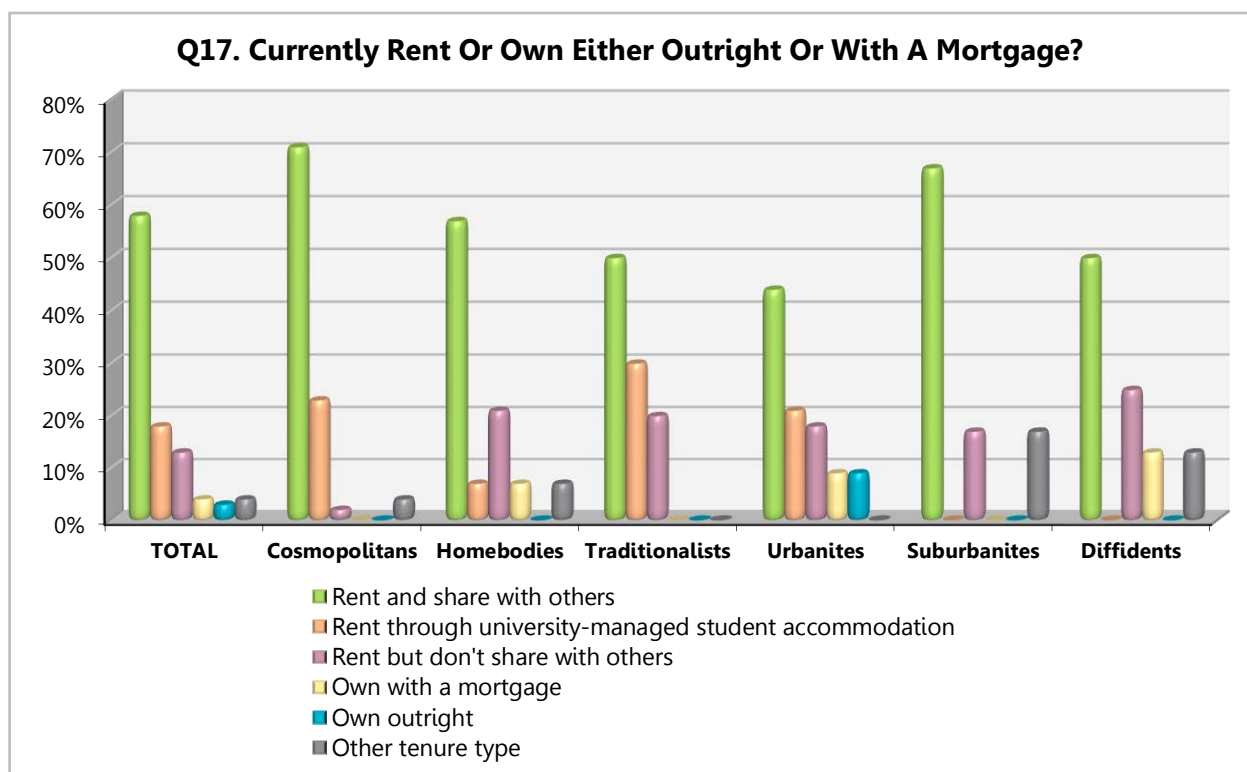


This question was asked of those respondents who indicated they lived in a multi-storey apartment. Please note this is a small sample size so caution should be exercised in interpreting the findings. Noise from other apartments was the least attractive feature for 21% of those respondents, while the small size (17%) and shared facilities (13%) were also unattractive features of apartment living.

4.9 Current Residence - Tenure and Value

Question 17 - Do you currently rent or own your home either outright or with a mortgage?

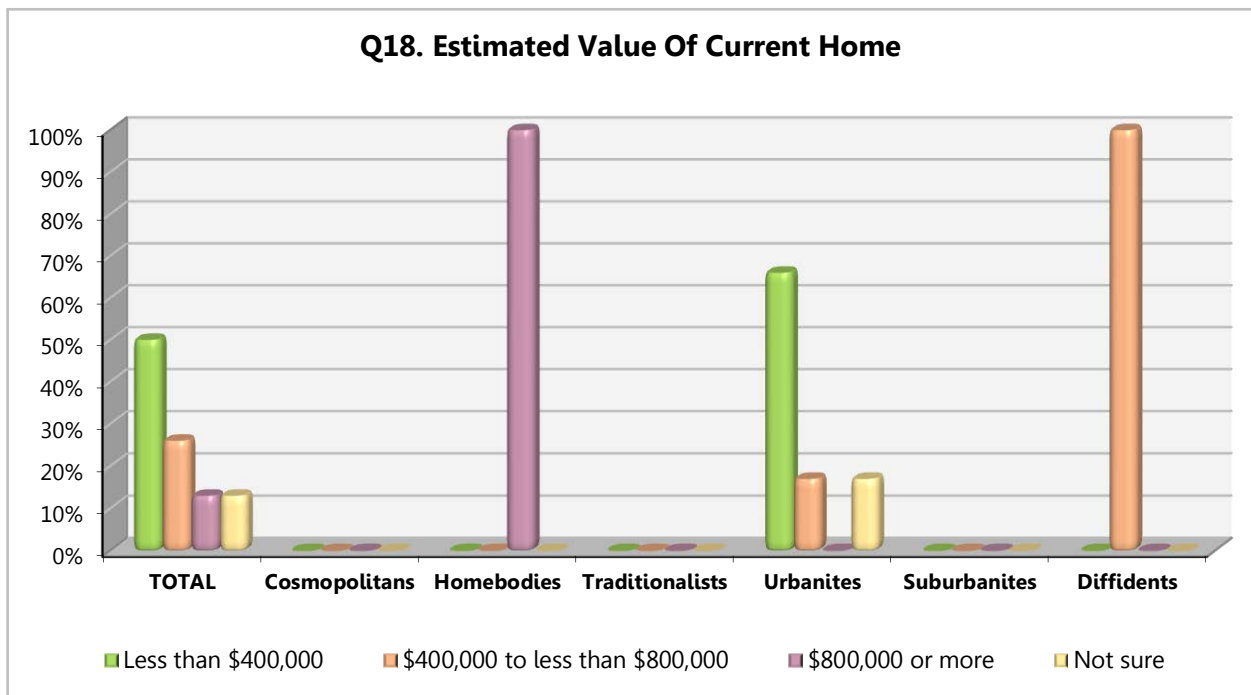
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
Rent and share with others	58%	71%	57%	50%	44%	67%	50%
Rent through university-managed student accommodation	18%	23%	7%	30%	21%	0%	0%
Rent but don't share with others	13%	2%	21%	20%	18%	17%	25%
Own with a mortgage	4%	0%	7%	0%	9%	0%	13%
Own outright	3%	0%	0%	0%	9%	0%	0%
Other tenure type	4%	4%	7%	0%	0%	17%	13%



Renting is the most popular tenure type for total respondents. Over half of total respondents are renting and sharing with others (58%), with a further 18% renting through university-managed student accommodation and 13% renting by themselves. A small proportion of total respondents own their home with a mortgage (4%) or own outright (3%).

Question 18 - What would you estimate to be the value of your current home?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample)	8	0	1	0	6	0	1
Less than \$200,000	25%	0%	0%	0%	33%	0%	0%
\$200,000 to less than \$300,000	25%	0%	0%	0%	33%	0%	0%
\$300,000 to less than \$400,000	0%	0%	0%	0%	0%	0%	0%
\$400,000 to less than \$500,000	13%	0%	0%	0%	0%	0%	100%
\$500,000 to less than \$600,000	0%	0%	0%	0%	0%	0%	0%
\$600,000 to less than \$700,000	0%	0%	0%	0%	0%	0%	0%
\$700,000 to less than \$800,000	13%	0%	0%	0%	17%	0%	0%
\$800,000 to less than \$900,000	0%	0%	0%	0%	0%	0%	0%
\$900,000 or more	13%	0%	100%	0%	0%	0%	0%
Not sure	13%	0%	0%	0%	17%	0%	0%

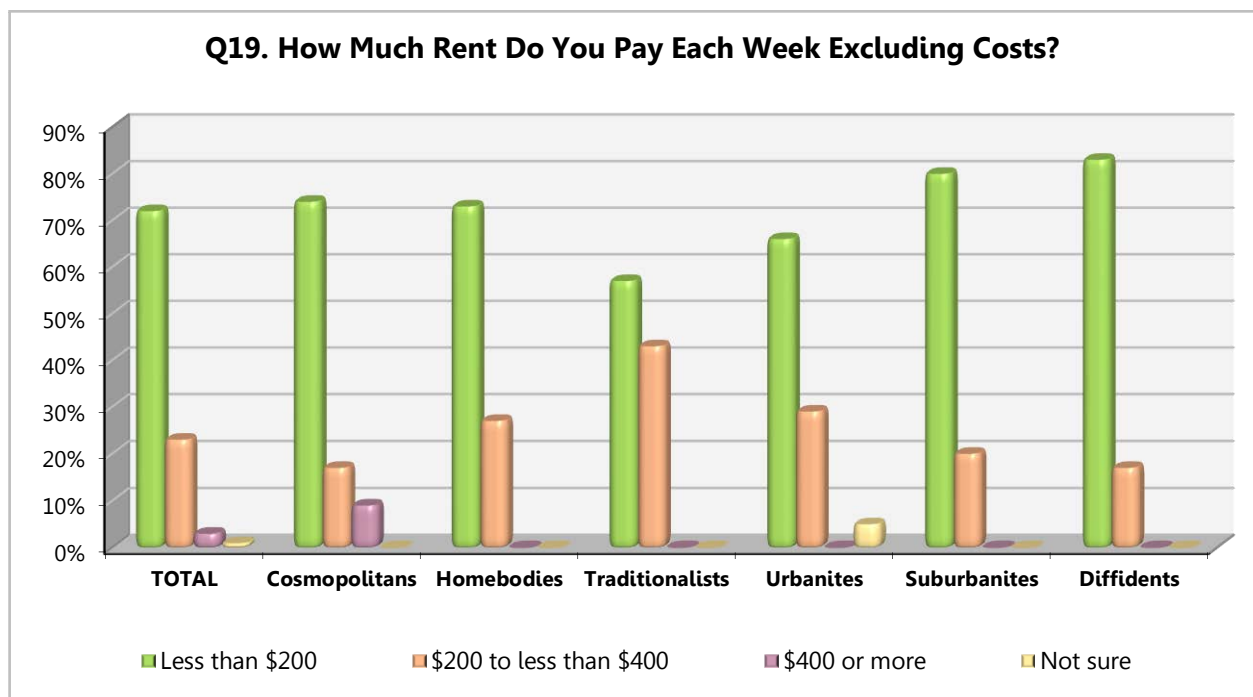


This question was asked of those respondents (7% of total respondents) who do not rent their property. Please note this is a very small sample size so caution should be exercised in interpreting the findings. Half of these respondents estimate the value of their current home at less than \$400,000 (50%) with a further 26% estimating the value of their home between \$400,000 and \$800,000.

4.10 Rental Costs and Satisfaction

Question 19 - How much rent do you pay each week excluding costs such as electricity and gas?

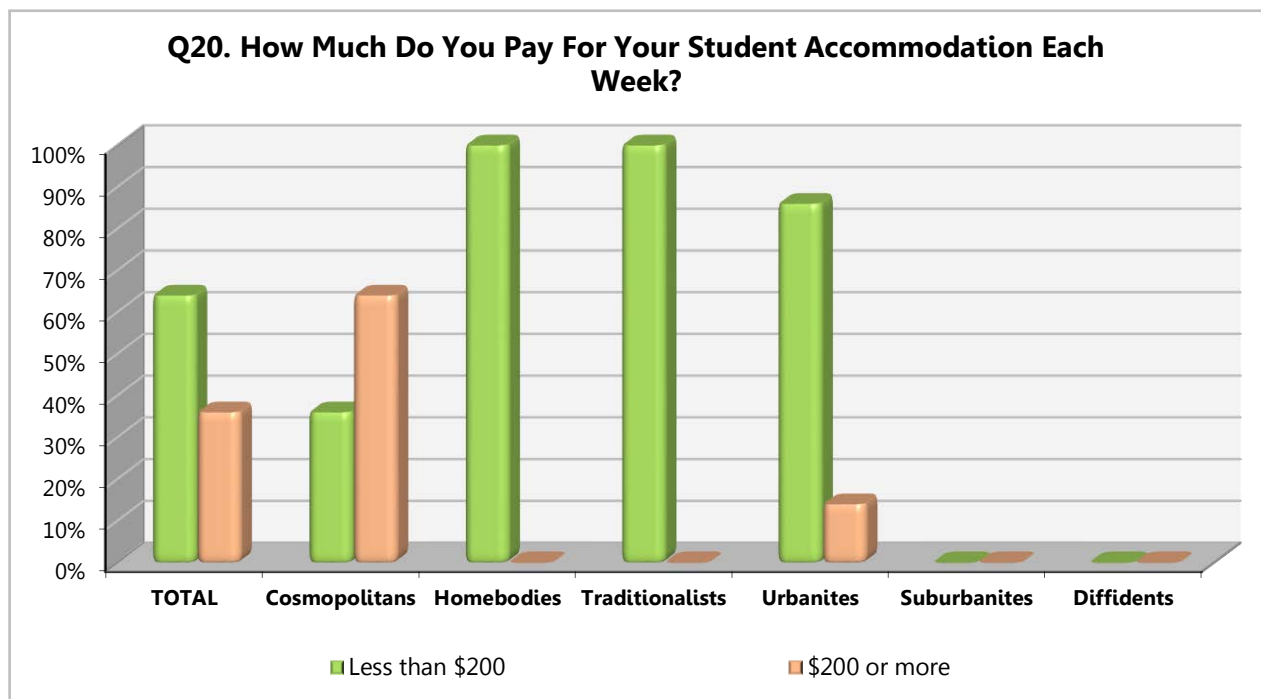
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	85	35	11	7	21	5	6
Less than \$100	11%	11%	0%	0%	14%	0%	33%
\$100 to less than \$200	61%	63%	73%	57%	52%	80%	50%
\$200 to less than \$300	16%	17%	9%	14%	19%	20%	17%
\$300 to less than \$400	7%	0%	18%	29%	10%	0%	0%
\$400 to less than \$500	1%	3%	0%	0%	0%	0%	0%
\$500 or more	2%	6%	0%	0%	0%	0%	0%
Not sure	1%	0%	0%	0%	5%	0%	0%



This question was asked of those respondents (71% of total respondents) who rent and share with others or rent and live by themselves. Nearly three-quarters of these respondents pay less than \$200 per week in rent (72%), with a further 23% paying between \$200 and \$400 per week in rent.

Question 20 - How much do you pay for your student accommodation each week?

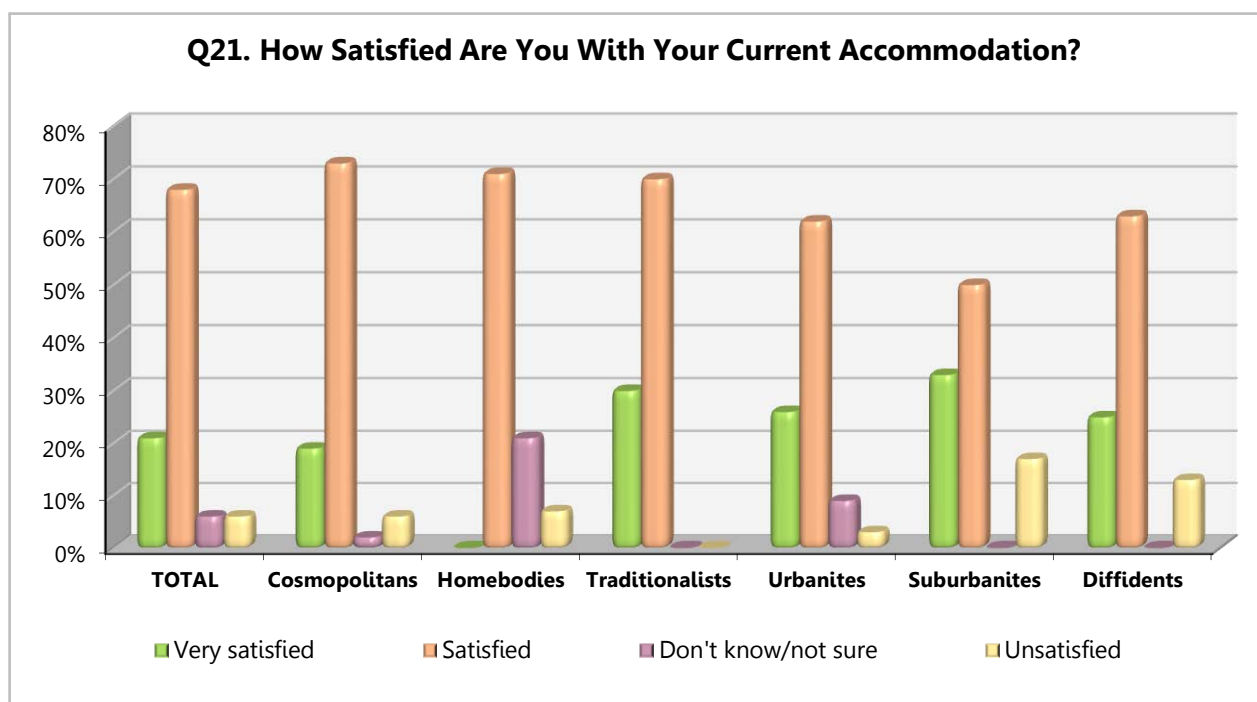
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample)	22	11	1	3	7	0	0
Less than \$200	64%	36%	100%	100%	86%	0%	0%
\$200 or more	36%	64%	0%	0%	14%	0%	0%



This question was asked of those respondents (18% of total respondents) who rent and live in university-managed student accommodation. Please note this is a very small sample size so caution should be exercised in interpreting the findings. Nearly two-thirds of these respondents pay less than \$200 per week in rent (64%).

Question 21 - How satisfied are you with your current accommodation?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
Very satisfied	21%	19%	0%	30%	26%	33%	25%
Satisfied	68%	73%	71%	70%	62%	50%	63%
Don't know/not sure	6%	2%	21%	0%	9%	0%	0%
Unsatisfied	6%	6%	7%	0%	3%	17%	13%

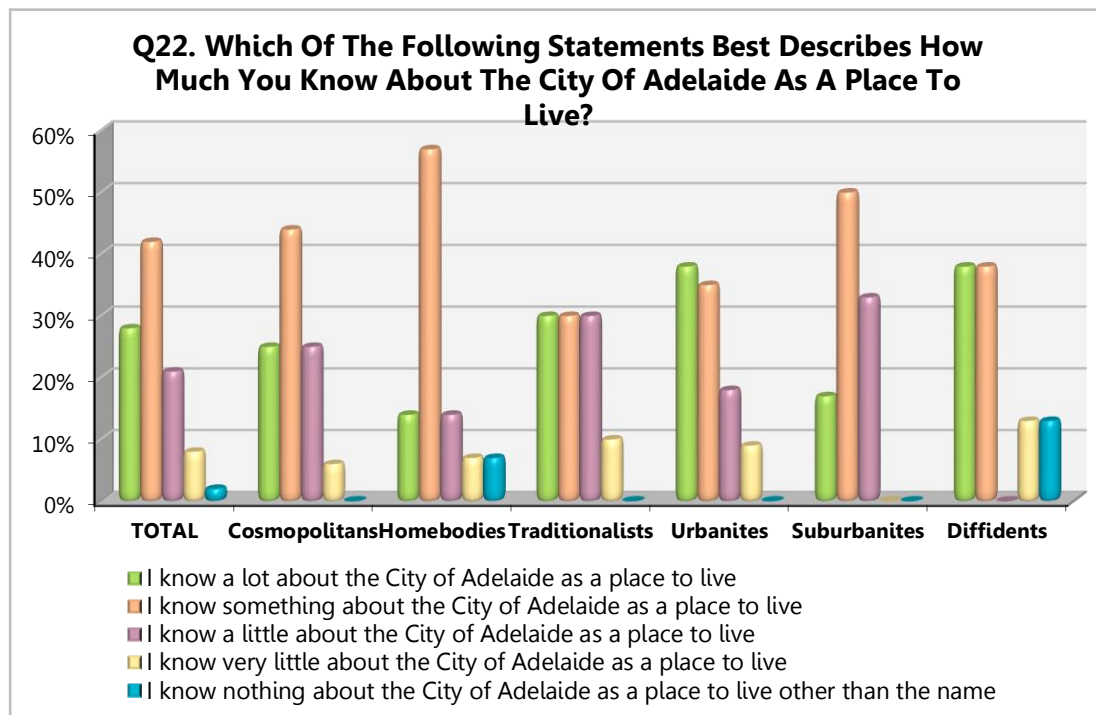


The majority (89%) of total respondents are satisfied with their current accommodation (21% very satisfied and 68% satisfied).

4.11 City Living – Knowledge and Perceptions

Question 22 - Which of the following statements best describes how much you know about the City of Adelaide as a place to live? When I say the City of Adelaide I am referring to the actual city centre as opposed to the inner city suburbs or North Adelaide.

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
I know a lot about the City of Adelaide as a place to live	28%	25%	14%	30%	38%	17%	38%
I know something about the City of Adelaide as a place to live	42%	44%	57%	30%	35%	50%	38%
I know a little about the City of Adelaide as a place to live	21%	25%	14%	30%	18%	33%	0%
I know very little about the City of Adelaide as a place to live	8%	6%	7%	10%	9%	0%	13%
I know nothing about the City of Adelaide as a place to live other than the name	2%	0%	7%	0%	0%	0%	13%



The majority of total respondents (91%) know something about the Adelaide CBD as a place to live with the remaining 10% of total respondents having minimal knowledge of the Adelaide CBD as a place to live (8% knowing very little and 2% knowing nothing).

Question 23 - In your view, which of the following statements describe the City of Adelaide?

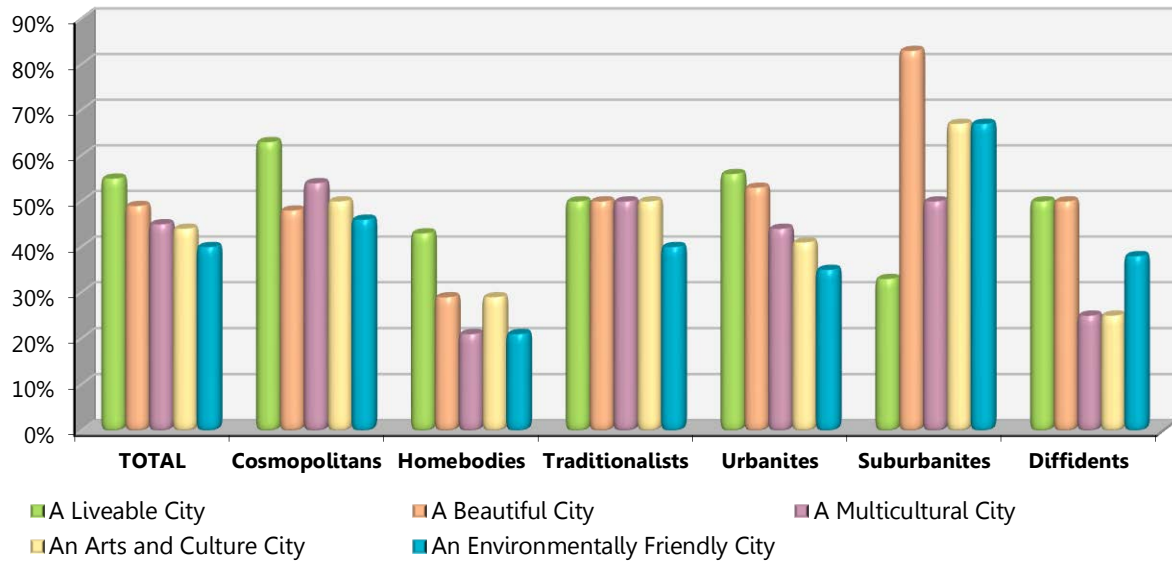
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	120	48	14	10	34	6	8
A Liveable City	55%	63%	43%	50%	56%	33%	50%
A Beautiful City	49%	48%	29%	50%	53%	83%	50%
A Multicultural City	45%	54%	21%	50%	44%	50%	25%
An Arts and Culture City	44%	50%	29%	50%	41%	67%	25%
An Environmentally Friendly City	40%	46%	21%	40%	35%	67%	38%
A Green City	39%	50%	14%	60%	32%	33%	25%
A Vibrant City	35%	42%	21%	40%	35%	17%	25%
A City of Business	23%	21%	21%	20%	32%	17%	13%
A Creative City	22%	19%	0%	30%	29%	33%	25%
A Smart City	21%	15%	14%	20%	32%	33%	13%
A Progressive City	21%	19%	14%	30%	29%	0%	13%
An attractive City to buy a home as an investment property	21%	15%	14%	40%	29%	17%	13%
An attractive City to buy a home in which to live	19%	19%	7%	20%	24%	33%	13%
An attractive City to rent a home in which to live	19%	15%	7%	30%	29%	17%	13%
An Innovative City	17%	4%	0%	20%	38%	33%	13%
A Cosmopolitan City	15%	10%	7%	20%	24%	17%	13%
A Boutique City	11%	6%	7%	10%	21%	0%	13%
An Entrepreneurial City	8%	2%	7%	10%	15%	0%	13%
None of these	2%	0%	0%	0%	3%	0%	13%

‘A Liveable City’ was the most frequently nominated statement identified by total respondents when asked which statement best describes Adelaide (55%). **‘A Beautiful City’** (49%), **‘A Multicultural City’** (45%) and **‘An Arts and Culture City’** (44%) were also frequently nominated. The Adelaide CBD was less likely to be described as **‘An Entrepreneurial City’** or a **‘A Boutique City’** by total respondents.

Three **‘attractiveness’** statements were included in this question, the first being **‘An attractive City to buy a home as an investment property’** with 21% of total respondents stating this describes Adelaide. A similar percentage (19%) claimed that Adelaide can be described as **‘An attractive City to buy a home in which to live’** and **‘An attractive City to rent a home in which to live’** (also 19%).

Please refer to the chart on the following page.

Q23. In Your View, Which Of The Following Statements Describe The City Of Adelaide? - Top 5



4.12 Psychographic Segmentation

Question 24 - 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.

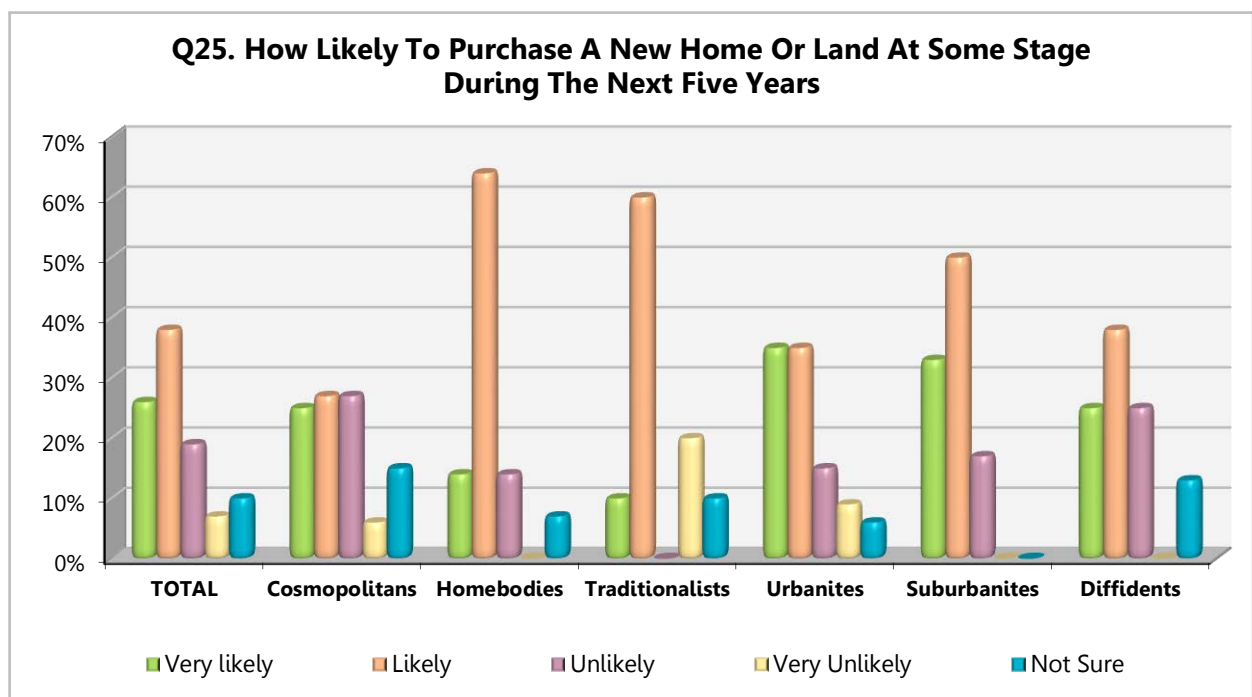
- I'd describe myself as kind of adventurous and outgoing
- I have a clear idea of my goals in life
- The idea of living in an apartment really appeals to me
- I would prefer to live in an area where most of the people come from backgrounds that are similar to my own
- I would prefer to live in a development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

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

4.13 Housing Purchase - Intentions, Budget and Features

Question 25 - 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?

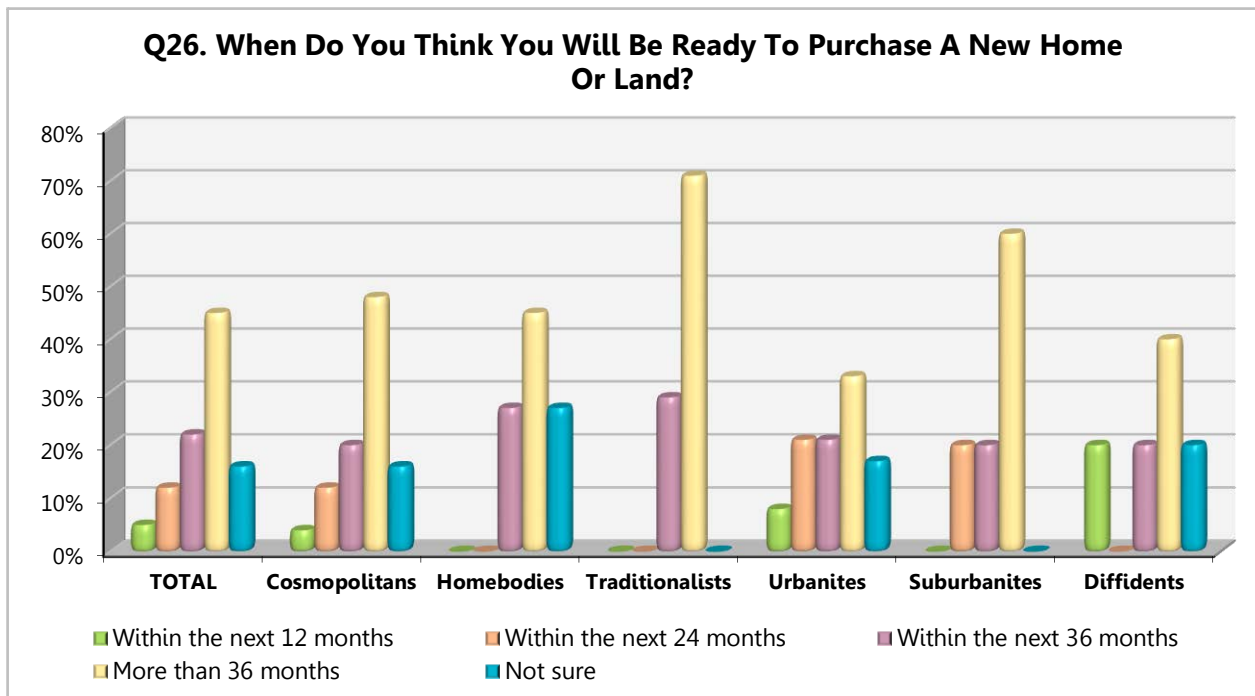
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
Very likely	26%	25%	14%	10%	35%	33%	25%
Likely	38%	27%	64%	60%	35%	50%	38%
Unlikely	19%	27%	14%	0%	15%	17%	25%
Very Unlikely	7%	6%	0%	20%	9%	0%	0%
Not Sure	10%	15%	7%	10%	6%	0%	13%



Nearly two-thirds of total respondents claim they are likely to purchase a property in the next five years (26% very likely and 38% likely).

Question 26 - When do you think you will be ready to purchase a new home or land?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
Within the next 12 months	5%	4%	0%	0%	8%	0%	20%
Within the next 24 months	12%	12%	0%	0%	21%	20%	0%
Within the next 36 months	22%	20%	27%	29%	21%	20%	20%
More than 36 months	45%	48%	45%	71%	33%	60%	40%
Not sure	16%	16%	27%	0%	17%	0%	20%

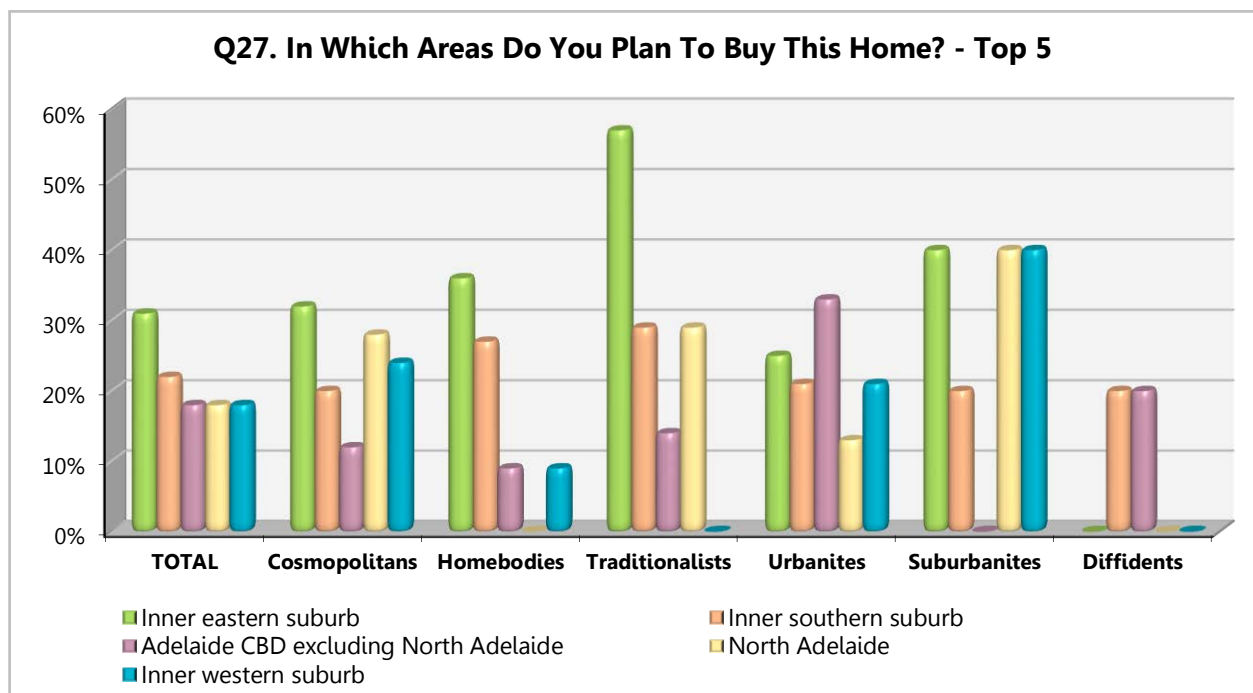


This question was asked of those respondents who would be likely to purchase a property in the next five years (64% of total respondents). Of those respondents who indicated they would be likely to purchase a property in the next five years, 17% would be ready to purchase within the next two years with a further 45% ready to purchase in more than three years.

Question 27 - 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	77	25	11	7	24	5	5
Inner eastern suburb	31%	32%	36%	57%	25%	40%	0%
Inner southern suburb	22%	20%	27%	29%	21%	20%	20%
Adelaide CBD excluding North Adelaide	18%	12%	9%	14%	33%	0%	20%
North Adelaide	18%	28%	0%	29%	13%	40%	0%
Inner western suburb	18%	24%	9%	0%	21%	40%	0%
Outer southern suburb	16%	8%	18%	57%	13%	20%	0%
Adelaide Hills	6%	8%	0%	14%	8%	0%	0%
Outer northern suburb	5%	4%	0%	0%	8%	0%	20%
Inner northern suburb	4%	4%	9%	0%	4%	0%	0%
Regional area (don't specify)	1%	4%	0%	0%	0%	0%	0%
Other	10%	16%	18%	0%	4%	0%	20%
Not sure	9%	8%	18%	0%	8%	0%	20%

This question was asked of those respondents who would be likely to purchase a property in the next five years (64% of total respondents). Of those respondents who indicated they would be likely to purchase a property in the next five years, 31% indicated they plan to buy the property in an inner eastern suburb, while the inner southern suburbs are also popular (22%). The Adelaide CBD (excluding North Adelaide), North Adelaide and the inner western suburbs are also popular choices for these respondents (18% each).



IF ADELAIDE CBD NOT ONE OF THE AREAS CONSIDERED:

*Question 28 - **I notice you didn't choose Adelaide as** one of the areas you would consider. What are your main reasons for this?*

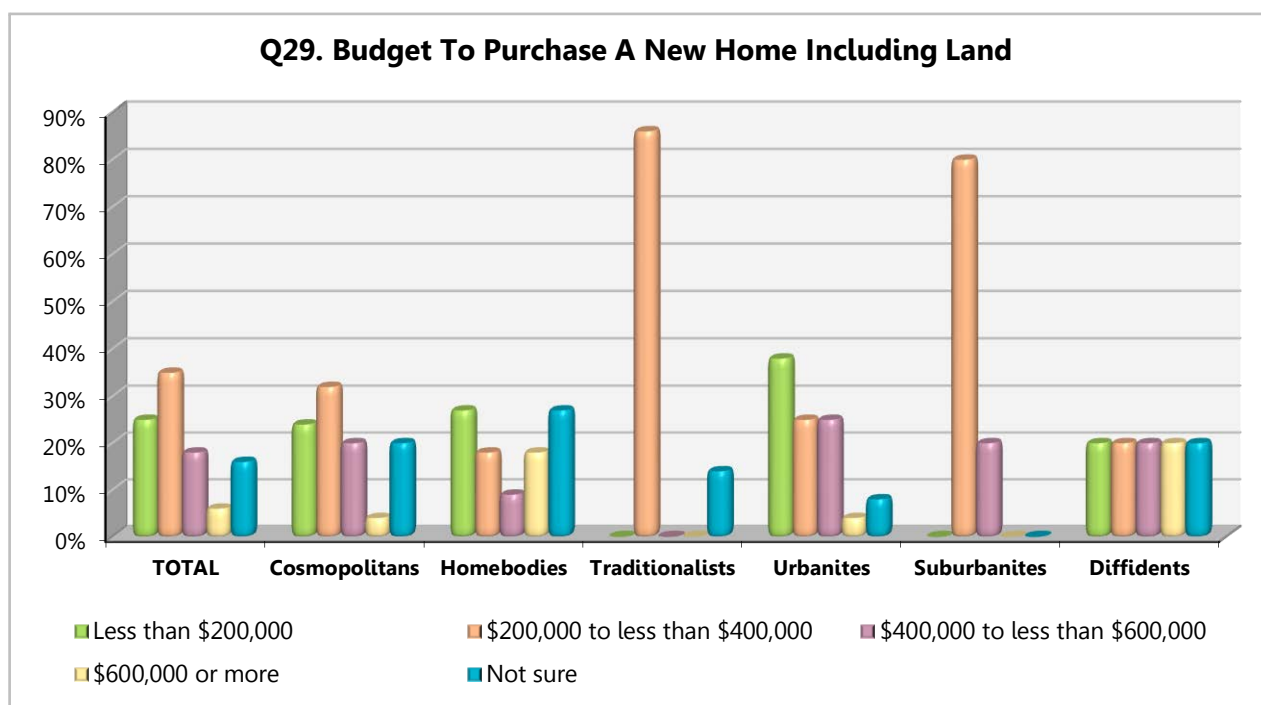
Those respondents who indicated they would be likely to purchase a property in the next five years, but did not choose Adelaide as one of the areas they would consider to buy a property in, were asked what was their main reason for not selecting the CBD. The most frequently nominated reason for not selecting Adelaide was that it is too expensive (x10) with the desire to live in a peaceful environment also a common theme.

Other reasons provided by respondents include:

Additional Reasons For Not Selecting Adelaide			
<p>Too noisy, busy, crowded, polluted</p> <p>Not a good place to settle down, offices, like peace and quiet, prefer suburbs/quiet lifestyle, noisy at night and weekends, poor air quality, cigarette smells, like more space</p> <p>24</p>	<p>Too expensive</p> <p>High living cost, too expensive to buy a home, can't afford, city centre prices are excessively high, very expensive compared to other suburbs</p> <p>12</p>	<p>Work related</p> <p>Not sure where work will be next year, not staying in Adelaide, prefer to live near work (not CBD), no jobs</p> <p>4</p>	<p>Family / Home related</p> <p>Will buy in home country, not living in Adelaide in future</p> <p>3</p>
<p>Prefer Beach location</p> <p>Prefer to live near the beach</p> <p>3</p>	<p>Parking Issues</p> <p>Lack of or no parking</p> <p>2</p>	<p>Other</p> <p>Can't get a proper house in the city, location, haven't decided</p> <p>3</p>	

Question 29 - Which of the following options would best match your budget if you were to consider purchasing a new home including land?

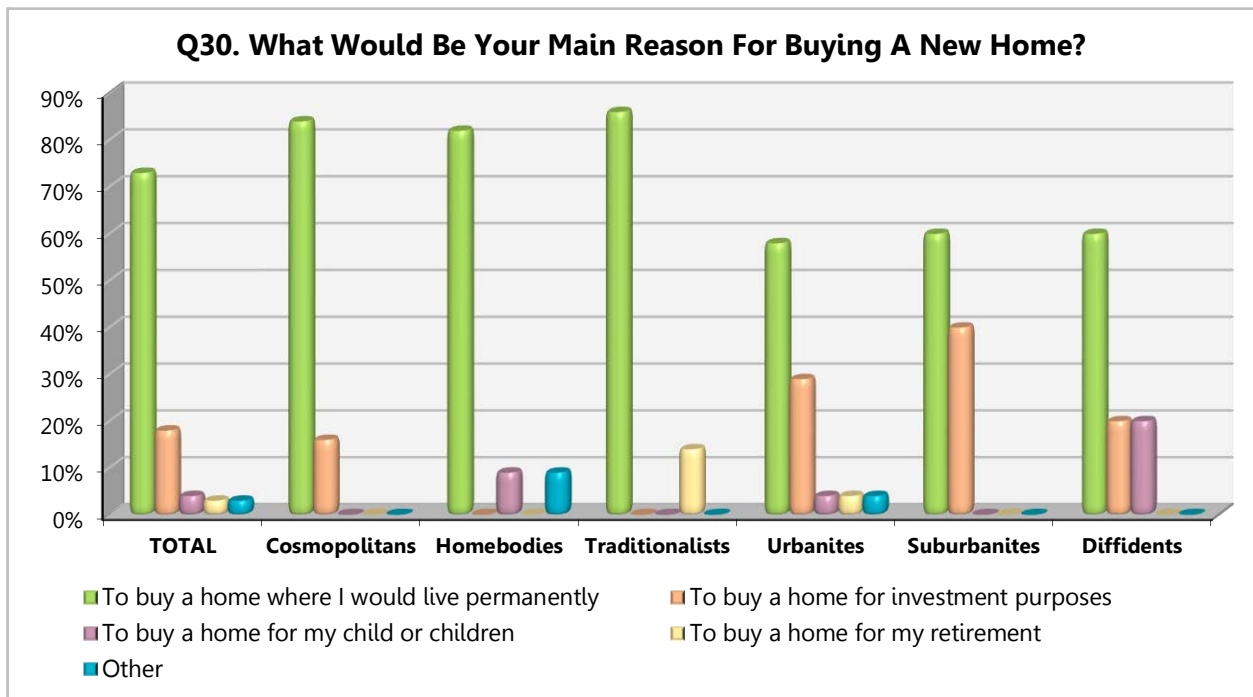
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
Less than \$100,000	8%	0%	9%	0%	21%	0%	0%
\$100,000 to less than \$200,000	17%	24%	18%	0%	17%	0%	20%
\$200,000 to less than \$300,000	14%	20%	0%	43%	8%	20%	0%
\$300,000 to less than \$400,000	21%	12%	18%	43%	17%	60%	20%
\$400,000 to less than \$500,000	5%	0%	9%	0%	8%	20%	0%
\$500,000 to less than \$600,000	13%	20%	0%	0%	17%	0%	20%
\$600,000 to less than \$700,000	1%	0%	9%	0%	0%	0%	0%
\$700,000 or more	5%	4%	9%	0%	4%	0%	20%
<i>\$100,000 to less than \$400,000</i>	<i>52%</i>	<i>56%</i>	<i>36%</i>	<i>86%</i>	<i>42%</i>	<i>80%</i>	<i>40%</i>



This question was asked of those respondents who would be likely to purchase a property in the next five years (64% 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 less than \$400,000 (52%). A small proportion of these respondents would have a budget of \$600,000 or more (6%).

Question 30 - What would be your main reason for buying a new home?

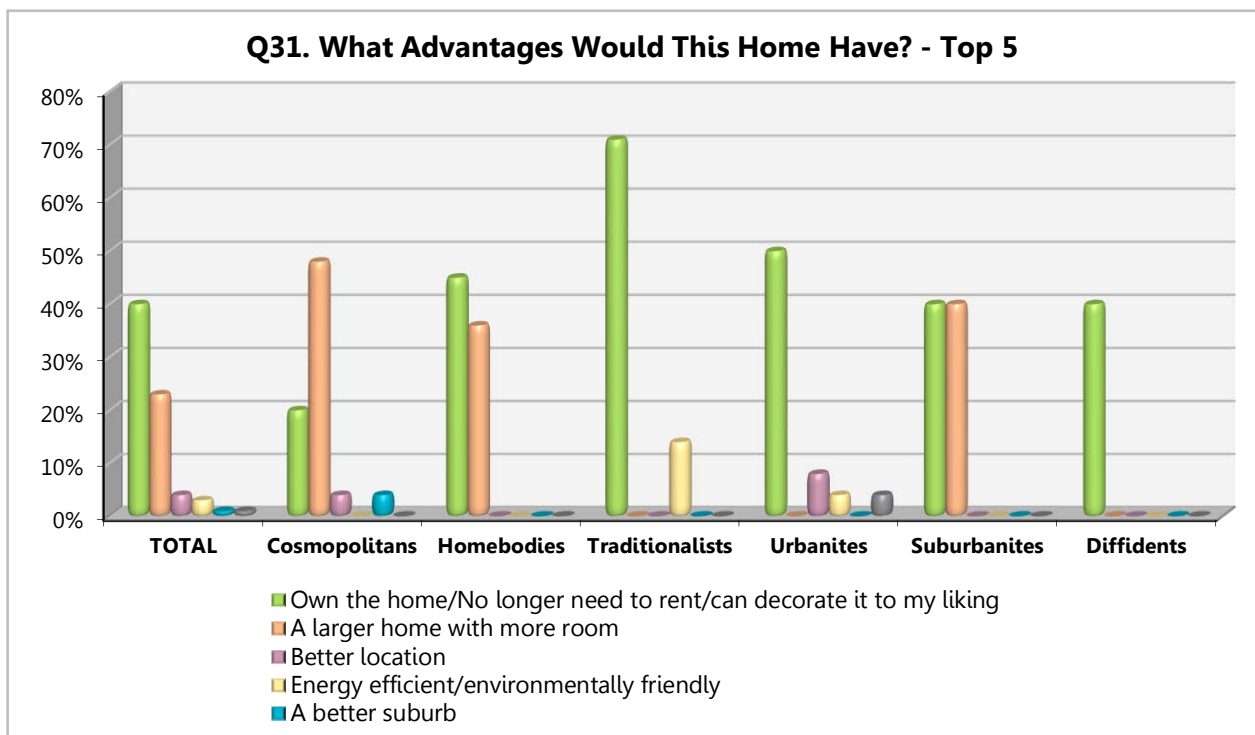
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
To buy a home where I would live permanently	73%	84%	82%	86%	58%	60%	60%
To buy a home for investment purposes	18%	16%	0%	0%	29%	40%	20%
To buy a home for my child or children	4%	0%	9%	0%	4%	0%	20%
To buy a home for my retirement	3%	0%	0%	14%	4%	0%	0%
Other	3%	0%	9%	0%	4%	0%	0%



This question was asked of those respondents who would be likely to purchase a property in the next five years (64% of total respondents). Nearly three-quarters of those respondents likely to purchase in the next five years would be purchasing a house where they would live permanently (73%), with a further 18% of these respondents purchasing a home for investment purposes.

Question 31 - And what advantages would this home have?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
Own the home/No longer need to rent/can decorate it to my liking	40%	20%	45%	71%	50%	40%	40%
A larger home with more room	23%	48%	36%	0%	0%	40%	0%
Better location	4%	4%	0%	0%	8%	0%	0%
Energy efficient/environmentally friendly	3%	0%	0%	14%	4%	0%	0%
A better suburb	1%	4%	0%	0%	0%	0%	0%
Closer to school for kids	1%	0%	0%	0%	4%	0%	0%
Better transportation	1%	4%	0%	0%	0%	0%	0%
Close to the beach	1%	0%	0%	14%	0%	0%	0%
Connection with nature	1%	0%	9%	0%	0%	0%	0%
A garden	1%	0%	0%	0%	0%	0%	20%
Don't know/Not sure	4%	12%	0%	0%	0%	0%	0%
No Answer	25%	16%	18%	0%	38%	40%	40%



This question was asked of those respondents who would be likely to purchase a property in the next five years (64% of total respondents). Nearly half of those respondents likely to purchase in the next five years nominated that the main advantage would be that they would own the home (40%) meaning freedom from renting and flexibility to decorate, while 23% of these respondents would be purchasing a larger property with more rooms.

Question 32 - Taking into account your budget, to what extent would the following types of homes be attractive to you?

This question was asked of those respondents who would be likely to purchase a property in the next five years (64% 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 (29% very attractive and 49% attractive) and also a townhouse/terrace (27% very attractive and 51% attractive). Encouragingly 43% of these respondents claimed an apartment in a 3 to 4 building would be attractive, 26% an apartment in a 5 to 8 storey building, and 21% each for an apartment in a 9 to 12 storey building and in a building more of more than 12 storeys.

	Very attractive	Attractive	Not sure	Not attractive
Detached home on a block of land	29%	49%	14%	8%
Townhouse or terrace house	27%	51%	12%	10%
Apartment in a 3 to 4 storey building	8%	35%	25%	32%
Apartment in a 5 to 8 storey building	4%	22%	30%	44%
Apartment in a 9 to 12 storey building	5%	16%	27%	52%
Apartment in a building of more than 12 storeys	8%	13%	21%	58%
Other (specify)	10%	6%	83%	0%

Other home types nominated by respondents included:

- Bungalow (x2)
- Home and land together (x2)
- A house in a group of houses in a gated community
- A semi-detached house
- A two storey house
- I like a detached house surrounded by garden but at the same time has easy access to city centre (e.g. North Adelaide or Mawson Lakes)
- Sustainable homes built with alternative materials (e.g. earthship, earthbag constructions)
- Tiny homes (self-contained or mobile) with self-sustainable features

Question 33 - 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?

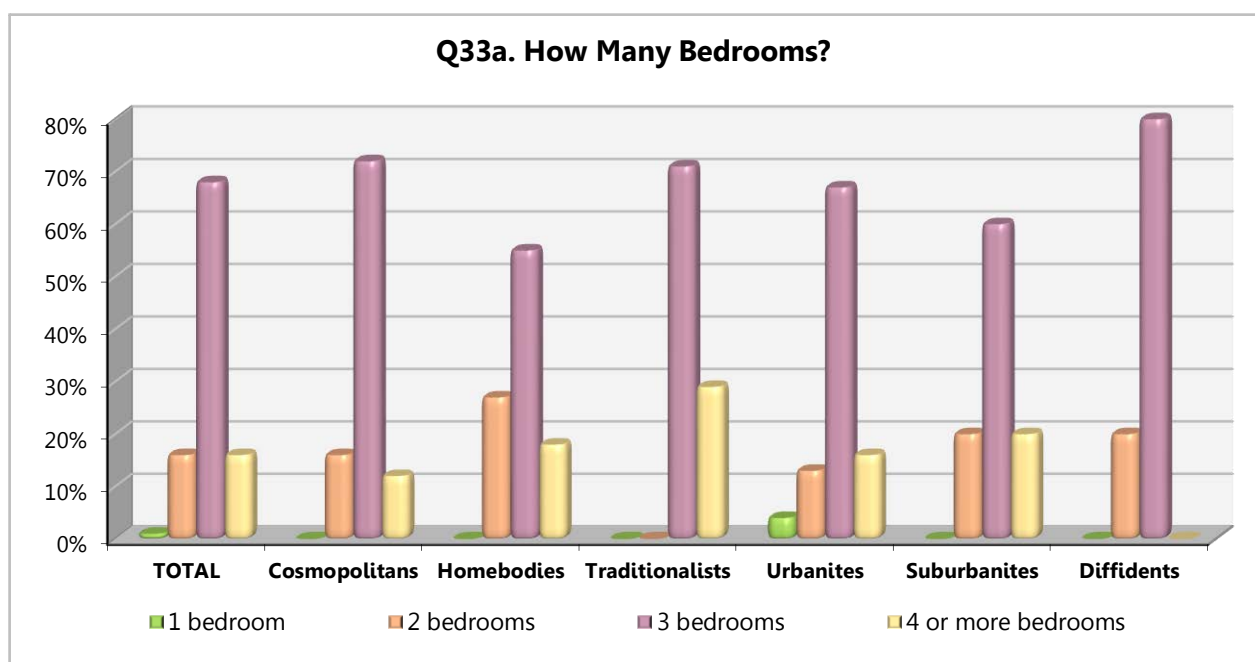
Key points to note regarding design features to be incorporated into a new house are as follows:

- Over two-thirds of those respondents who would be likely to purchase a property in the next five years would prefer three bedrooms (68%) with a further 16% preferring two bedrooms
- Over three-quarters of these respondents would prefer two bathrooms (82%) with a further 9% preferring one bathroom reflecting their preference for houses with a smaller number of bedrooms
- Over half of these respondents would prefer one living space (53%) with a further 42% preferring two living spaces
- Nearly three-quarters of these respondents would prefer two car spaces (70%) while 21% prefer one car space
- An outdoor entertainment area was favoured by nearly all of the respondents (87%)

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

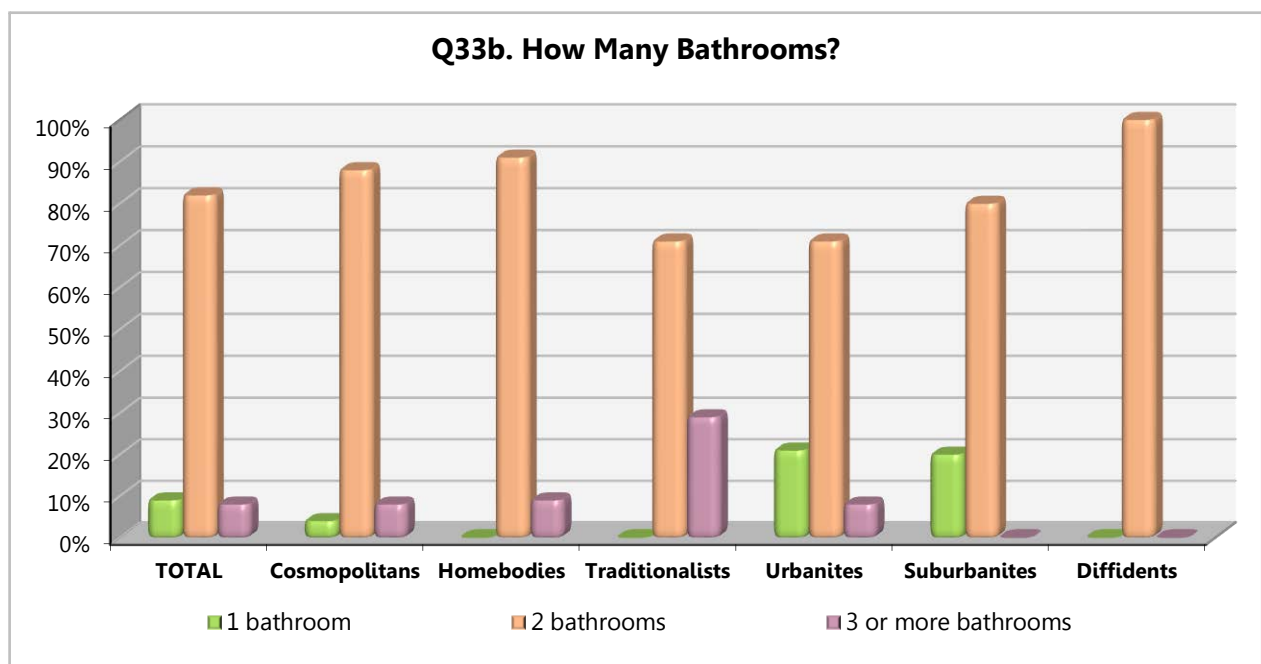
Question 33a – How many bedrooms would you prefer in your purchased property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
1 bedroom	1%	0%	0%	0%	4%	0%	0%
2 bedrooms	16%	16%	27%	0%	13%	20%	20%
3 bedrooms	68%	72%	55%	71%	67%	60%	80%
4 or more bedrooms	16%	12%	18%	29%	16%	20%	0%



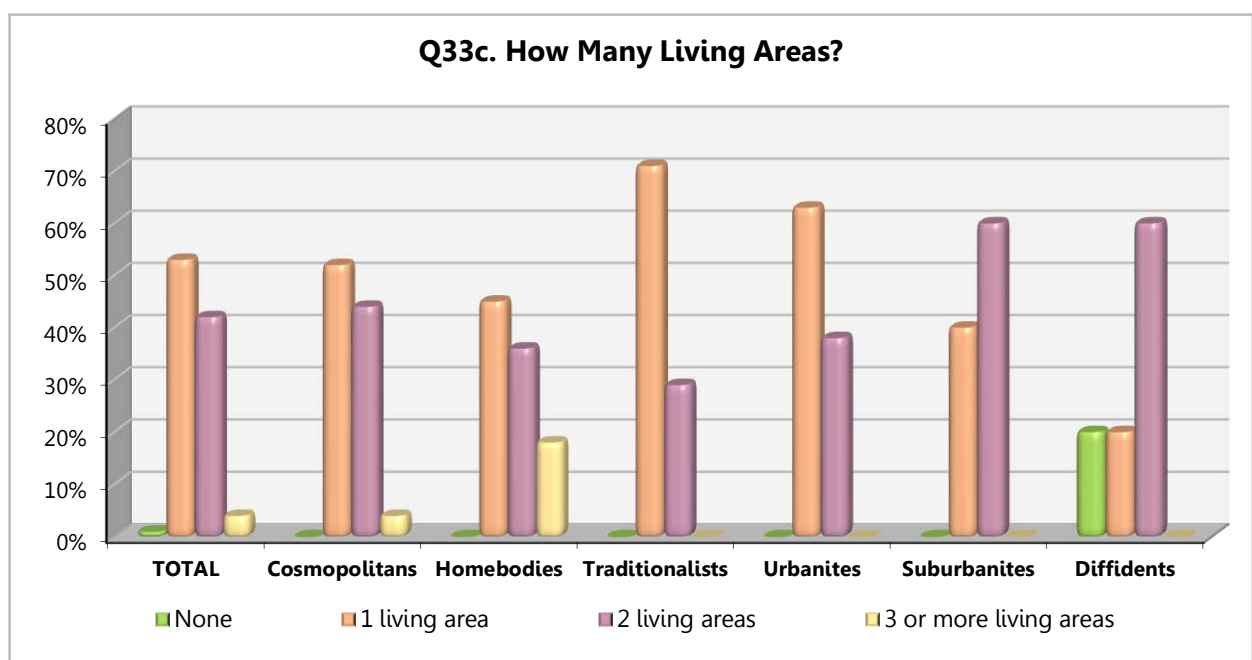
Question 33b – How many bathrooms would you prefer in your purchased property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
1 bathroom	9%	4%	0%	0%	21%	20%	0%
2 bathrooms	82%	88%	91%	71%	71%	80%	100%
3 or more bathrooms	8%	8%	9%	29%	8%	0%	0%



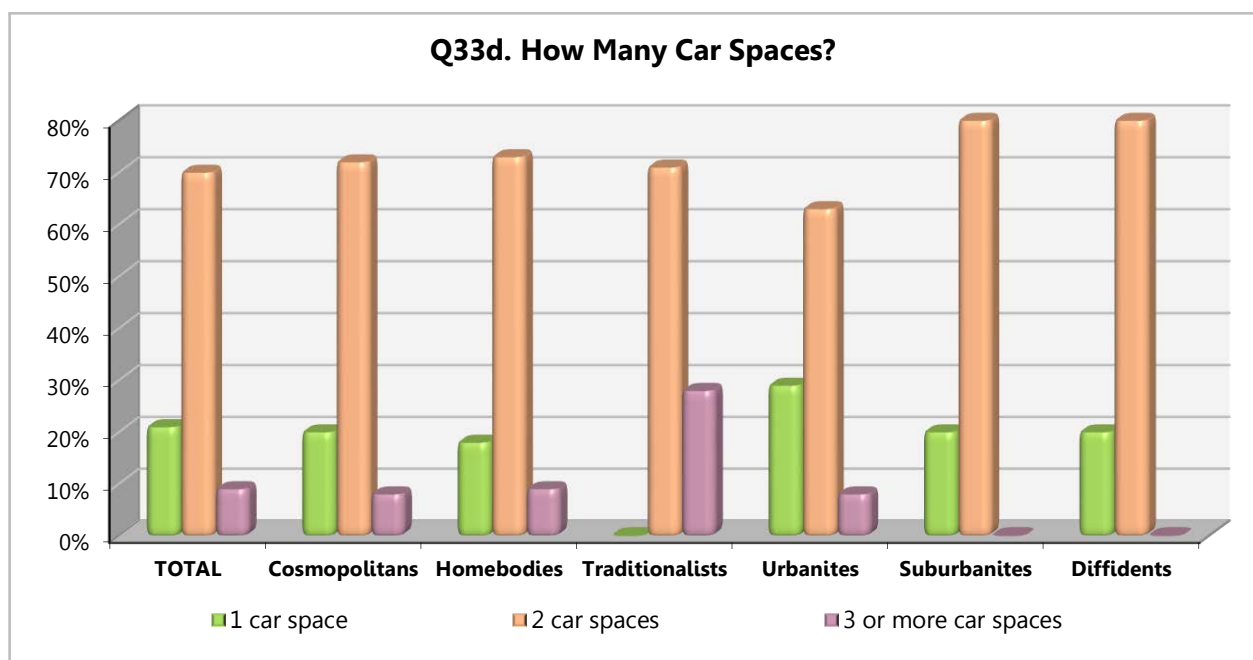
Question 33c – How many living areas would you prefer in your purchased property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
No living areas	1%	0%	0%	0%	0%	0%	20%
1 living area	53%	52%	45%	71%	63%	40%	20%
2 living areas	42%	44%	36%	29%	38%	60%	60%
3 or more living areas	4%	4%	18%	0%	0%	0%	0%



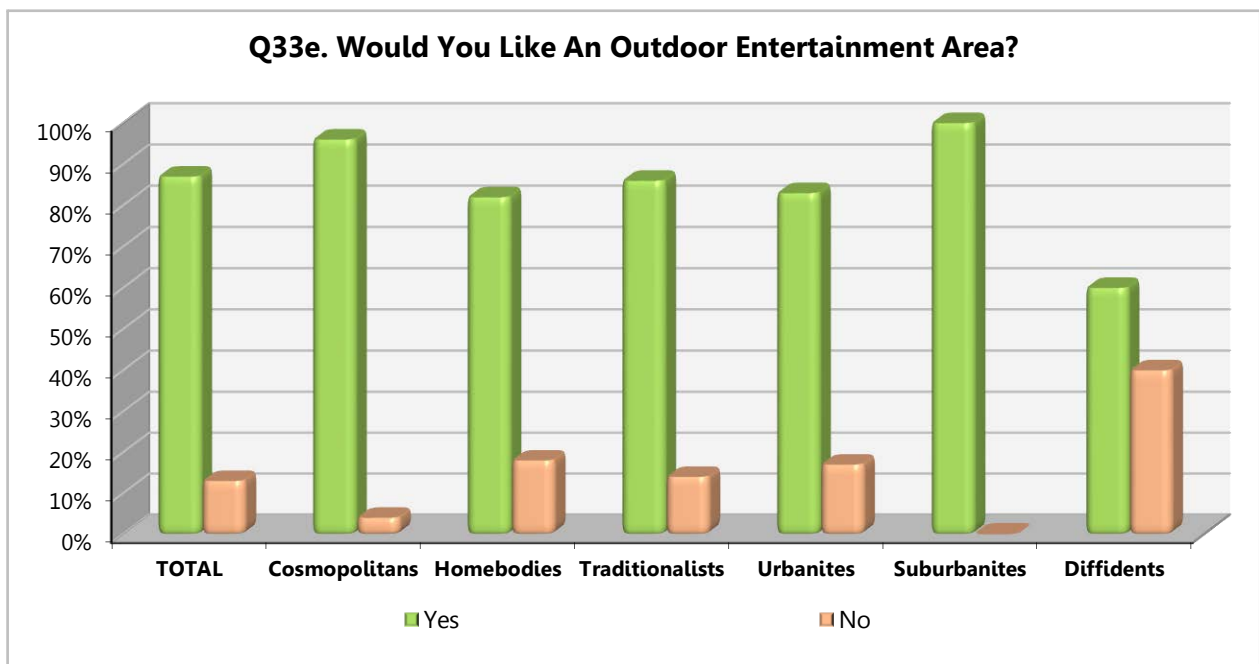
Question 33d – How many car spaces would you prefer in your purchased property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
1 car space	21%	20%	18%	0%	29%	20%	20%
2 car spaces	70%	72%	73%	71%	63%	80%	80%
3 or more car spaces	9%	8%	9%	28%	8%	0%	0%



Question 33e – Would you like an outdoor entertainment area in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
Yes	87%	96%	82%	86%	83%	100%	60%
No	13%	4%	18%	14%	17%	0%	40%



Question 34 - 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

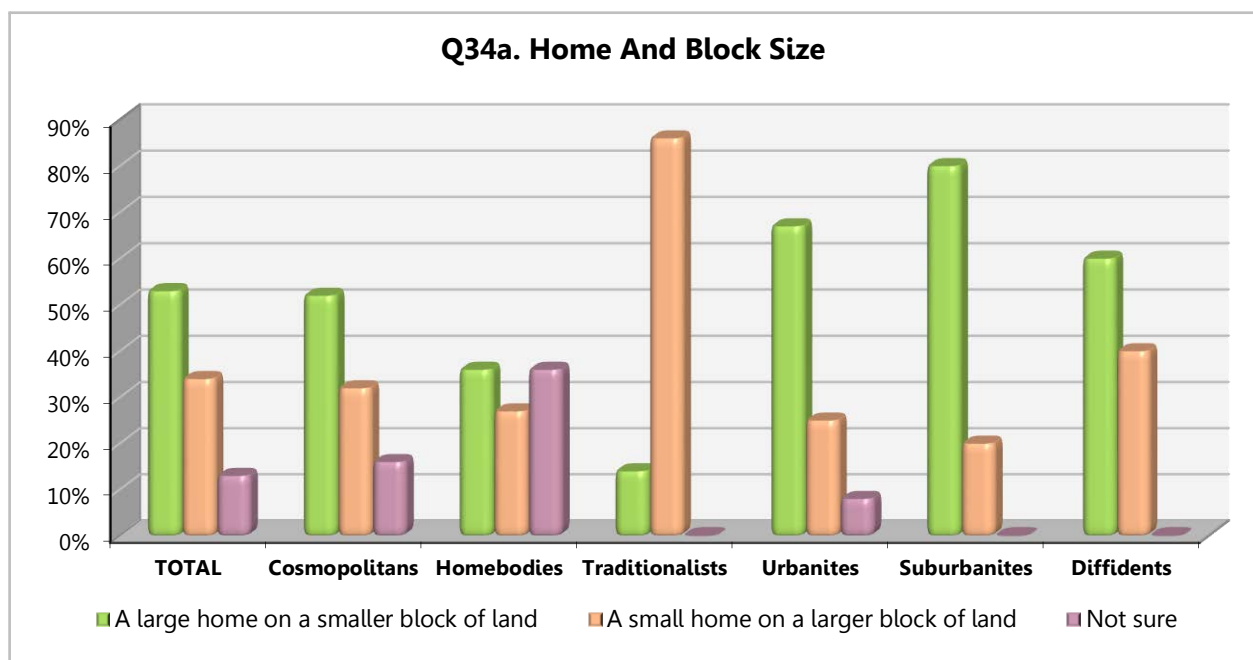
Key points to note regarding the above options are as follows:

- Over 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 (53%) in preference to a small home on a larger block of land
- Nearly two-thirds of respondents would prefer a home with parking for one car and easy access to good public transport (62%) in preference to a home with parking for two cars
- 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 (52%) in preference to an apartment where you could walk to work

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

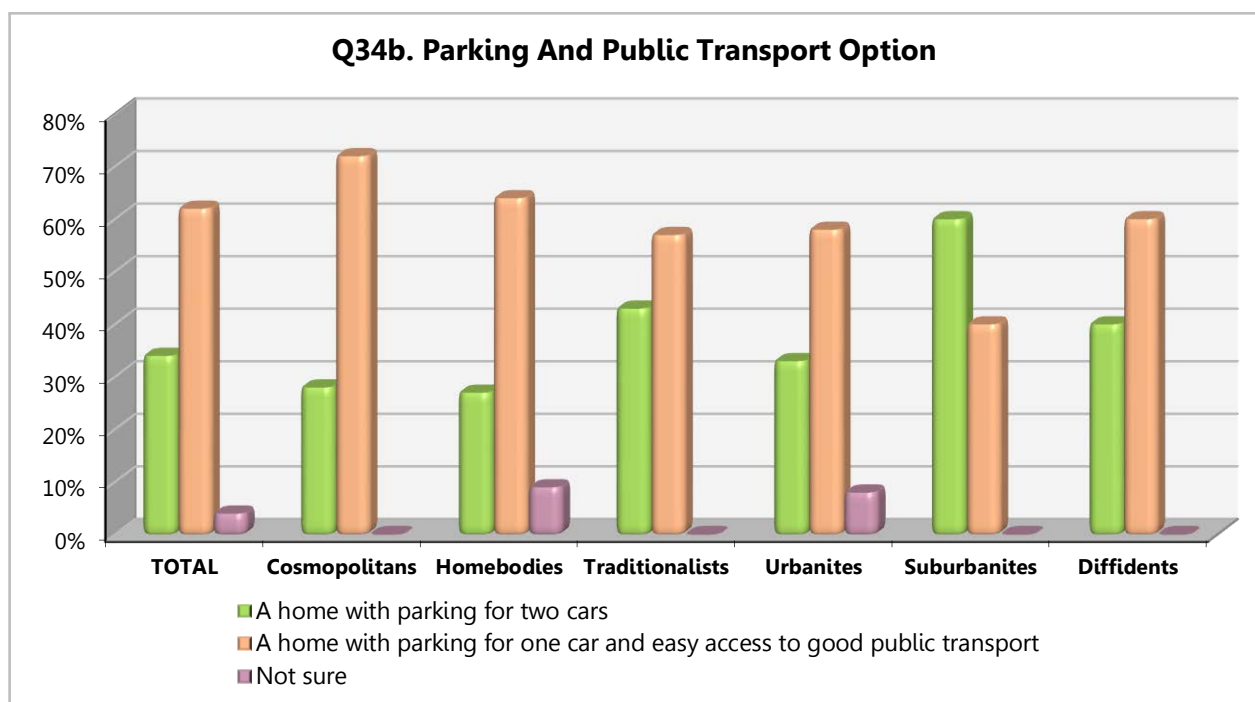
Question 34a – What home and block size would you prefer in your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
A large home on a smaller block of land	53%	52%	36%	14%	67%	80%	60%
A small home on a larger block of land	34%	32%	27%	86%	25%	20%	40%
Not sure	13%	16%	36%	0%	8%	0%	0%



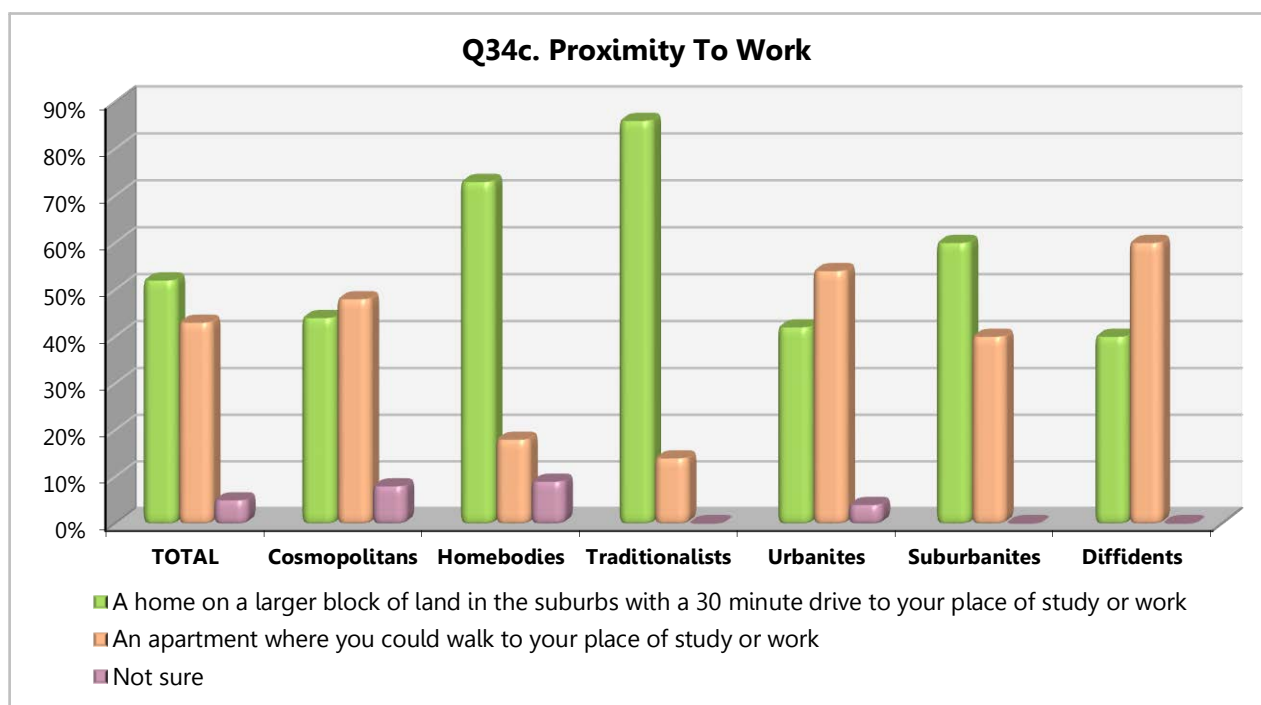
Question 34b – What parking and public transport facilities would you prefer in your purchased property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
A home with parking for two cars	34%	28%	27%	43%	33%	60%	40%
A home with parking for one car and easy access to good public transport	62%	72%	64%	57%	58%	40%	60%
Not sure	4%	0%	9%	0%	8%	0%	0%



Question 34c - Proximity to work and transport preferences for your purchase property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	77	25	11	7	24	5	5
A home on a larger block of land in the suburbs with a 30 minute drive to your place of study or work	52%	44%	73%	86%	42%	60%	40%
An apartment where you could walk to your place of study or work	43%	48%	18%	14%	54%	40%	60%
Not sure	5%	8%	9%	0%	4%	0%	0%



4.14 Apartment Living - Attitudes

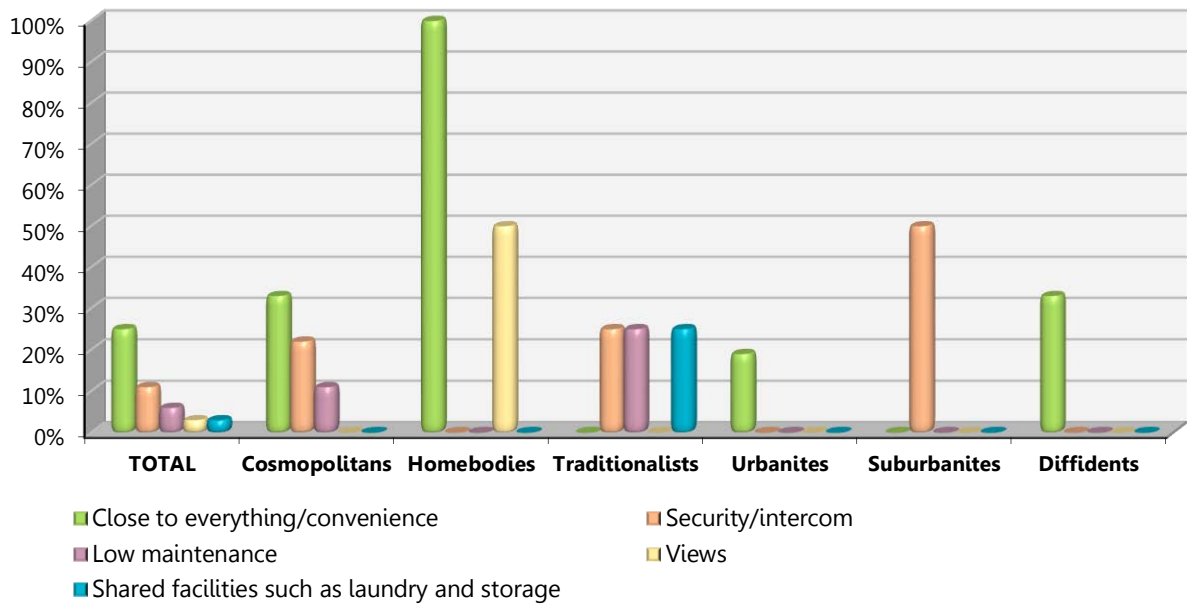
Question 35 - What do you find most attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size (caution small sample)	36	9	2	4	16	2	3
Close to everything/convenience	25%	33%	100%	0%	19%	0%	33%
Security/intercom	11%	22%	0%	25%	0%	50%	0%
Low maintenance	6%	11%	0%	25%	0%	0%	0%
Views	3%	0%	50%	0%	0%	0%	0%
Shared facilities such as laundry and storage	3%	0%	0%	25%	0%	0%	0%
Closer to where I study	3%	0%	0%	0%	6%	0%	0%
Good neighbours/neighbourhood	3%	11%	0%	0%	0%	0%	0%
Convenient to shopping	3%	0%	0%	0%	6%	0%	0%
Close to work	3%	0%	0%	0%	6%	0%	0%
Peace and quiet (tranquillity)	3%	0%	0%	0%	6%	0%	0%
Parking	3%	0%	0%	0%	6%	0%	0%
Location/area (General mention)	3%	0%	0%	0%	6%	0%	0%
Affordable/cheap rent	3%	11%	0%	0%	0%	0%	0%
Don't know	3%	0%	0%	25%	0%	0%	0%
No Answer	39%	22%	0%	0%	56%	50%	67%

This question was asked of those respondents who answered either very attractive or attractive to apartment living (30% of total respondents). Living close to everything and convenience are the most attractive features of apartment living for 25% of these respondents, while security and an intercom is attractive for 11% of these respondents.

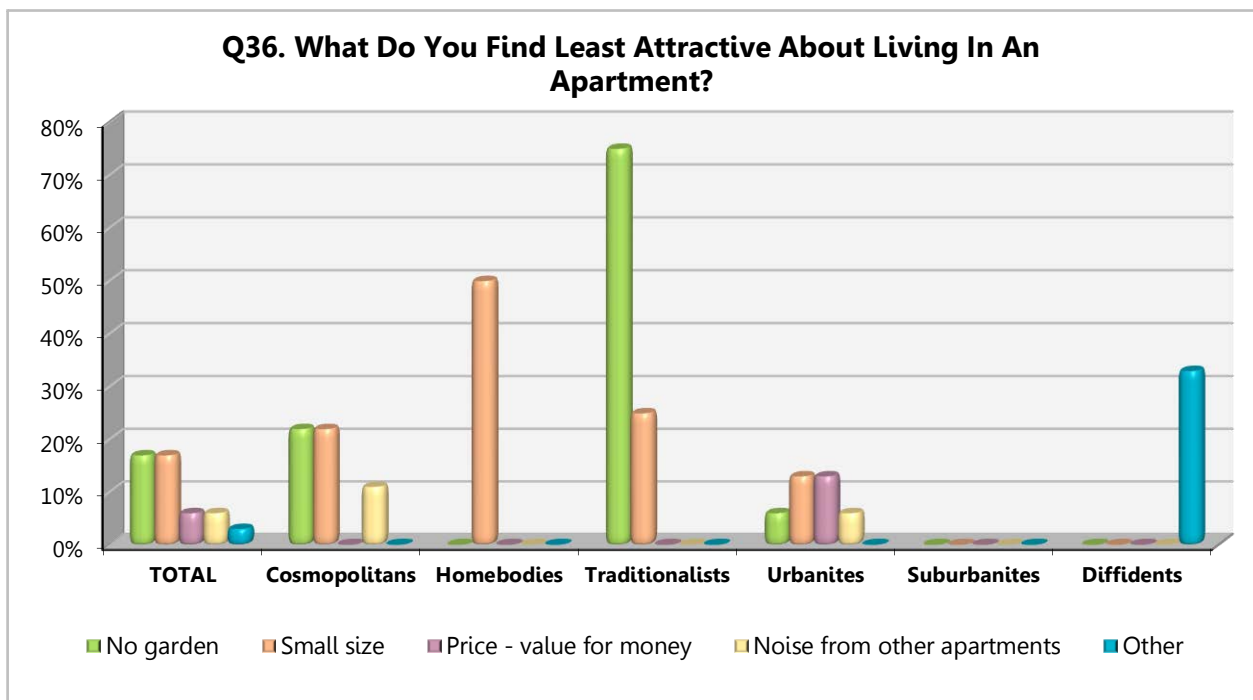
Please refer to the chart on the following page.

Q35. What Do You Find Most Attractive About Living In An Apartment? - Top 5



Question 36 - And what do you find least attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size (caution small sample)	36	9	2	4	16	2	3
No garden	17%	22%	0%	75%	6%	0%	0%
Small size	17%	22%	50%	25%	13%	0%	0%
Price - value for money	6%	0%	0%	0%	13%	0%	0%
Noise from other apartments	6%	11%	0%	0%	6%	0%	0%
Other	3%	0%	0%	0%	0%	0%	33%
No Answer	56%	44%	50%	25%	63%	100%	67%

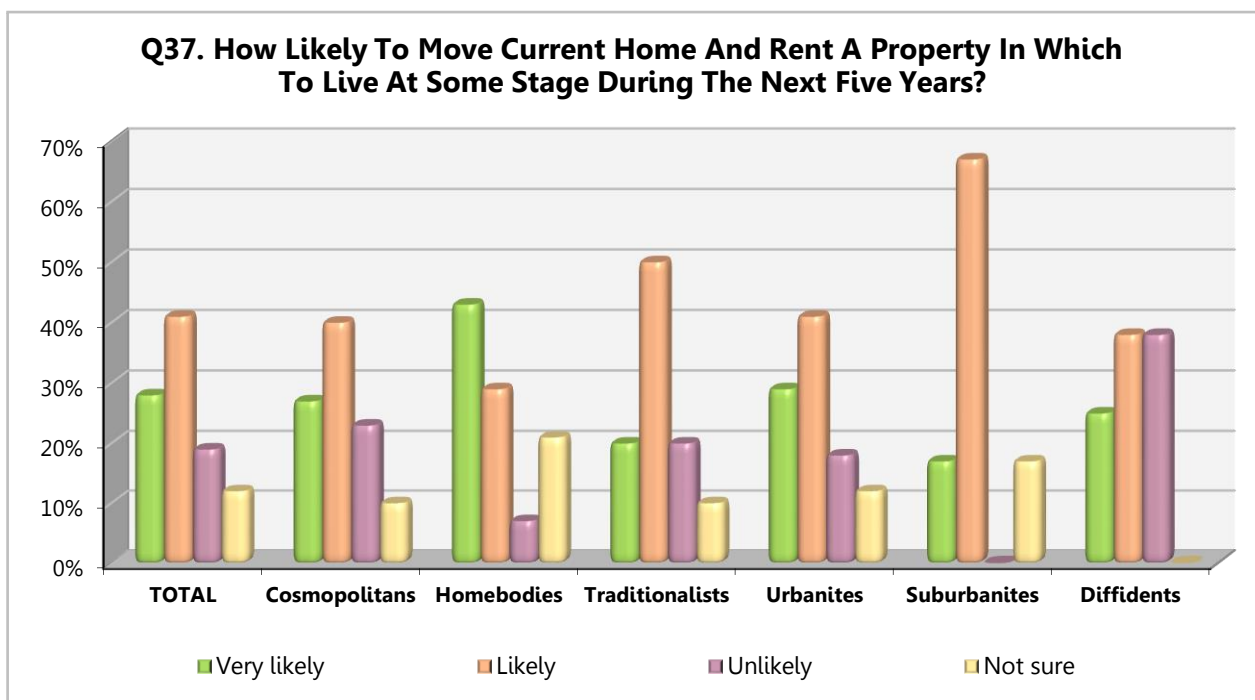


This question was asked of those respondents who answered either very attractive or attractive to apartment living (30% of total respondents). No garden and the small size of the apartment are the least attractive features of apartment living for 17% of these respondents, while the price and noise from other apartments is least attractive for 6% of respondents.

4.15 Renting - Intention, Budget and Features

Question 37 - 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?

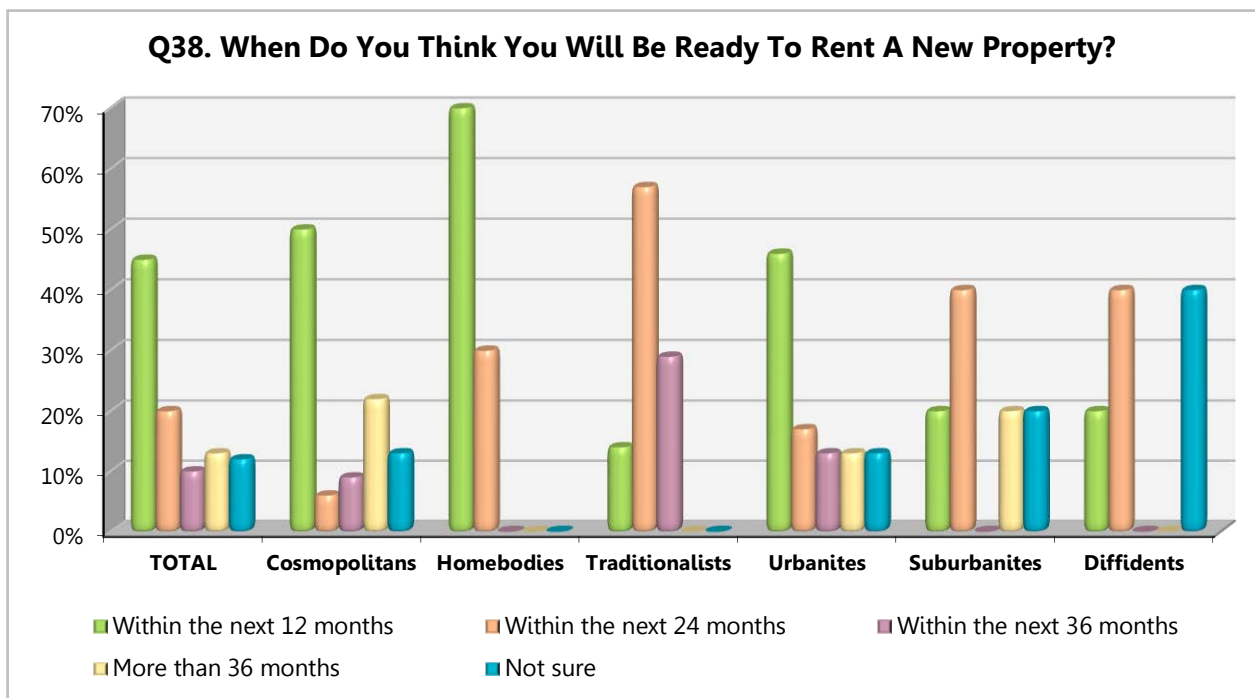
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
Very likely	28%	27%	43%	20%	29%	17%	25%
Likely	41%	40%	29%	50%	41%	67%	38%
Unlikely	19%	23%	7%	20%	18%	0%	38%
Not sure	12%	10%	21%	10%	12%	17%	0%



Over two-thirds of total respondents are likely to move from their current home and rent a property in the next five years (28% very likely and 41% likely).

Question 38 - When do you think you will be ready to rent a new property?

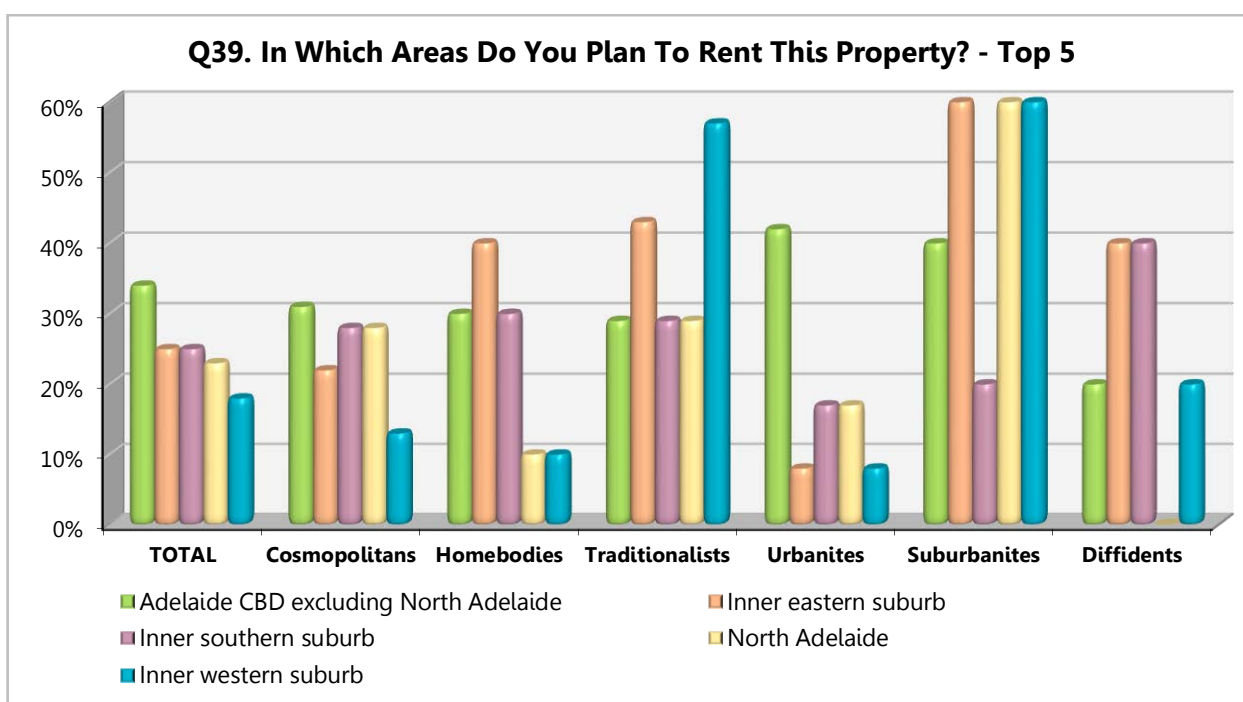
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
Within the next 12 months	45%	50%	70%	14%	46%	20%	20%
Within the next 24 months	20%	6%	30%	57%	17%	40%	40%
Within the next 36 months	10%	9%	0%	29%	13%	0%	0%
More than 36 months	13%	22%	0%	0%	13%	20%	0%
Not sure	12%	13%	0%	0%	13%	20%	40%



This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (69% 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, nearly half would be ready to rent within next twelve months (45%) with another 30% ready to move between two to three years (20% within 24 months, 10% within 36 months).

Question 39 - In which of the following areas do you plan to rent this property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
Adelaide CBD excluding North Adelaide	34%	31%	30%	29%	42%	40%	20%
Inner eastern suburb	25%	22%	40%	43%	8%	60%	40%
Inner southern suburb	25%	28%	30%	29%	17%	20%	40%
North Adelaide	23%	28%	10%	29%	17%	60%	0%
Inner western suburb	18%	13%	10%	57%	8%	60%	20%
Inner northern suburb	14%	13%	20%	29%	4%	40%	20%
Outer southern suburb	13%	13%	10%	29%	13%	0%	20%
Outer northern suburb	5%	3%	10%	0%	8%	0%	0%
Adelaide Hills	5%	3%	0%	14%	8%	0%	0%
Regional area	1%	0%	0%	0%	4%	0%	0%
Other	4%	3%	10%	14%	0%	0%	0%
Not sure	8%	13%	20%	0%	4%	0%	0%



This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (69% 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, 34% indicated that they plan to rent in the Adelaide CBD, while a quarter of respondents prefer the inner eastern and inner southern suburbs (each 25%).

IF ADELAIDE CBD NOT ONE OF THE AREAS CONSIDERED:

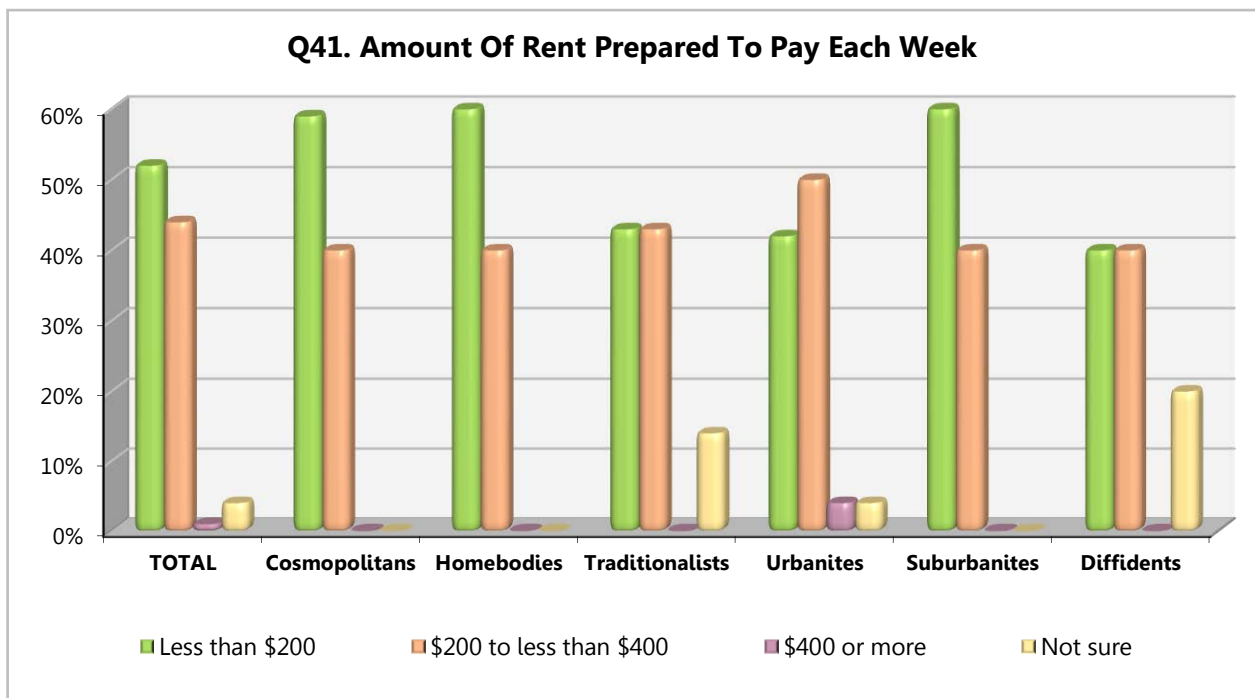
Question 40 - I notice you didn't choose Adelaide as one of the areas you would consider. What are your main reasons for this?

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 in, were asked what their main reason was for not selecting the CBD. The main reasons provided by respondents are the expense of renting in the City and a preference to live in a more tranquil environment. All reasons provided include:

Reasons For Not Choosing Adelaide As An Area To Rent In			
<p>Too expensive</p> <p>Out of price range, expensive to live in city, budget not sufficient, renting more expensive closer to CBD</p> <p>18</p>	<p>Too noisy, crowded, busy and polluted</p> <p>Prefer peace and quiet, prefer suburbs, away from hustle and bustle, too loud, too busy</p> <p>18</p>	<p>Inconvenient</p> <p>Too far from work / study, parking is a problem in the City</p> <p>10</p>	<p>Only options are apartments, can't have a big place</p> <p>2</p>
<p>Won't be living in Adelaide, likely not going to live in Adelaide</p> <p>2</p>	<p>Unsafe</p> <p>1</p>		

Question 41 - Which of the following options would best match the amount of rent you would be prepared to pay each week for this property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
Less than \$100	5%	6%	0%	0%	4%	0%	20%
\$100 to less than \$200	47%	53%	60%	43%	38%	60%	20%
\$200 to less than \$300	34%	34%	20%	29%	46%	0%	40%
\$300 to less than \$400	10%	6%	20%	14%	4%	40%	0%
\$400 or more	1%	0%	0%	0%	4%	0%	0%
Not sure	4%	0%	0%	14%	4%	0%	20%

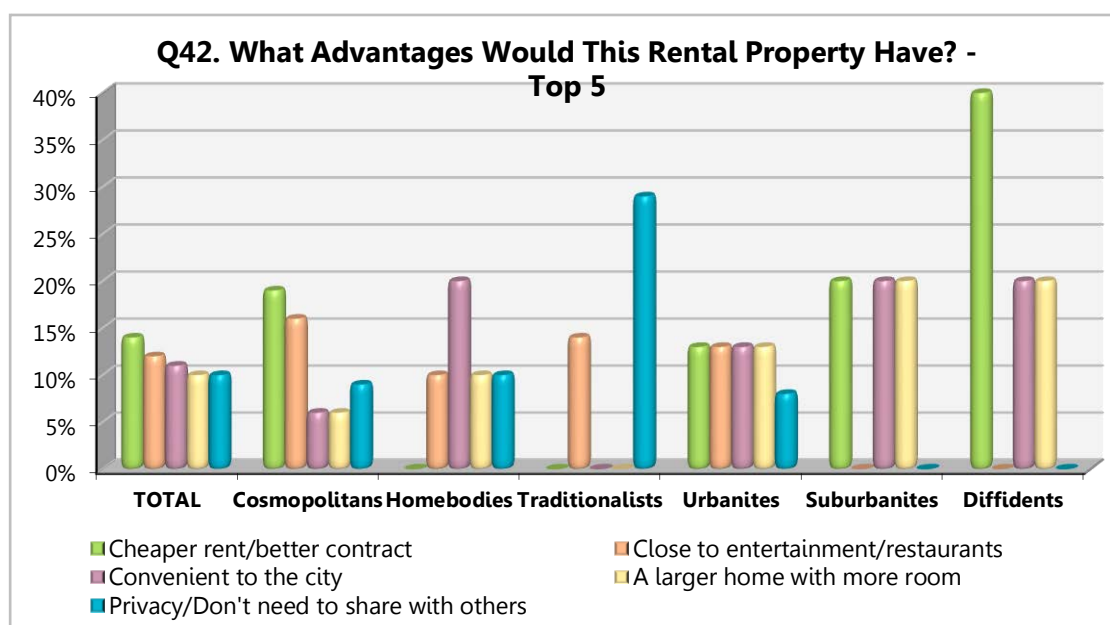


This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (69% of total respondents). Over half of those respondents likely to rent in the next five years stated their budget to rent a home would be less than \$200 per week (52%), while 11% of the respondents would have a budget more than \$300 per week.

Question 42 - And what advantages would this rental property have?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
Cheaper rent/better contract	14%	19%	0%	0%	13%	20%	40%
Close to entertainment/restaurants	12%	16%	10%	14%	13%	0%	0%
Convenient to the city	11%	6%	20%	0%	13%	20%	20%
A larger home with more room	10%	6%	10%	0%	13%	20%	20%
Privacy/Don't need to share with others	10%	9%	10%	29%	8%	0%	0%
Proximity/easy access to public transport	6%	9%	10%	0%	4%	0%	0%
Close to where I study	6%	9%	0%	0%	8%	0%	0%
Better location	5%	3%	0%	14%	4%	0%	20%
It is safe and secure place to live/a place where I feel safe	5%	6%	0%	0%	4%	20%	0%
Closer to work	4%	6%	10%	0%	0%	0%	0%
Better facilities	4%	3%	20%	0%	0%	0%	0%
A garden	2%	0%	10%	14%	0%	0%	0%
A better suburb	1%	0%	0%	14%	0%	0%	0%
Close to the beach	1%	0%	0%	14%	0%	0%	0%
Energy efficient/environmentally friendly	1%	3%	0%	0%	0%	0%	0%
Don't know/not sure	8%	3%	0%	0%	21%	20%	0%

This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (69% of total respondents). 'Cheaper rent/better contract' **was the most** frequently nominated advantage given for renting (14%) while a further 12% of respondents would move to be closer to entertainment and restaurants.



Question 43 - Taking into account your budget, to what extent would the following types of homes be attractive for you to rent?

This question was asked of those respondents who would be likely to move from their current property and rent in the next five years (69% of total respondents).

Over three-quarters of those respondents likely to move from their current property and rent in the next five years indicated that they found a townhouse/terrace house to be the most attractive option (25% very attractive and 59% attractive). The next most popular type of home was a detached home on a block of land with 68% of respondents finding that an attractive option (25% very attractive and 43% attractive). Nearly two-thirds (60%) of these respondents claimed an apartment in a 3 to 4 storey building would be attractive, 45% an apartment in a 5 to 8 storey building, 30% an apartment in a 9 to 12 storey building and 34% in a building more of more than 12 storeys.

	Very attractive	Attractive	Not sure	Not attractive
Townhouse or terrace house	25%	59%	11%	5%
Detached home on a block of land	25%	43%	20%	11%
Apartment in a 3 to 4 storey building	17%	43%	19%	20%
Apartment in a 5 to 8 storey building	11%	34%	19%	36%
Apartment in a 9 to 12 storey building	14%	16%	24%	46%
Apartment in a building of more than 12 storeys	12%	22%	16%	51%
Other (specify)	6%	2%	92%	0%

Other home types nominated by respondents included:

- Bungalow
- A granny flat or single home unit
- A two storey house
- Tiny homes (self-contained or mobile) with self-sustainable features

Question 44 - 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?

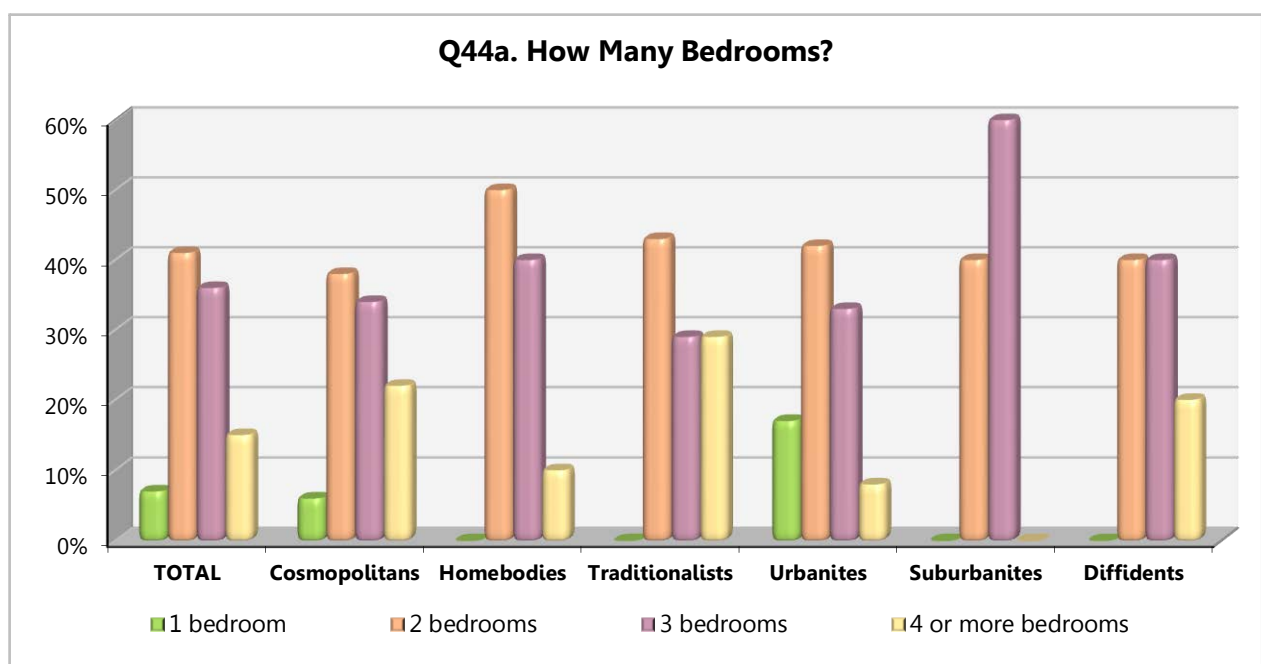
Key points to note regarding design features to be incorporated into a rental property are as follows:

- Nearly half of those respondents who would be likely to rent a property in the next five years would prefer two bedrooms (41%) with a further 36% preferring three bedrooms
- Nearly three-quarters of respondents would prefer two bathrooms (71%) with 22% of these respondents preferring one bathroom
- Over two-thirds of respondents would prefer one living space (67%) with a further 25% prefer two living spaces
- Nearly half of these respondents would prefer two car spaces (47%) with a further 35% preferring one car space
- An outdoor entertainment area was favoured by over three-quarters of these respondents (78%)

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

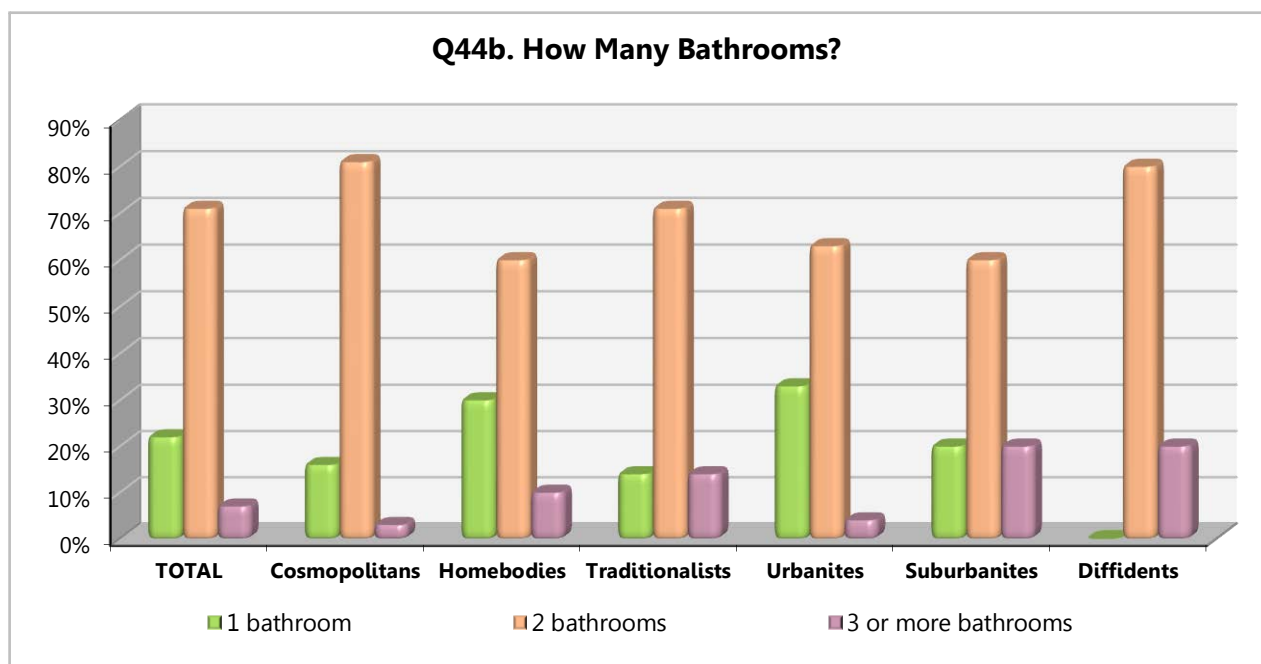
Question 44a – How many bedrooms would you prefer in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
1 bedroom	7%	6%	0%	0%	17%	0%	0%
2 bedrooms	41%	38%	50%	43%	42%	40%	40%
3 bedrooms	36%	34%	40%	29%	33%	60%	40%
4 or more bedrooms	15%	22%	10%	29%	8%	0%	20%



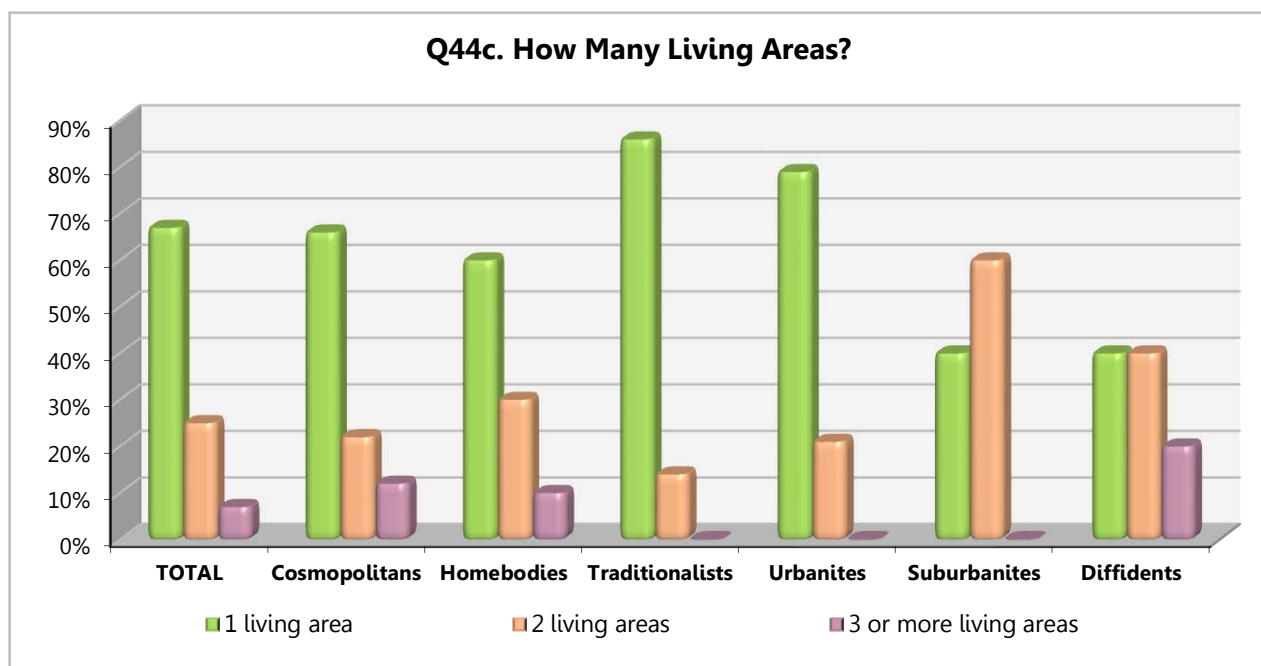
Question 44b – How many bathrooms would you prefer in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
1 bathroom	22%	16%	30%	14%	33%	20%	0%
2 bathrooms	71%	81%	60%	71%	63%	60%	80%
3 or more bathrooms	7%	3%	10%	14%	4%	20%	20%



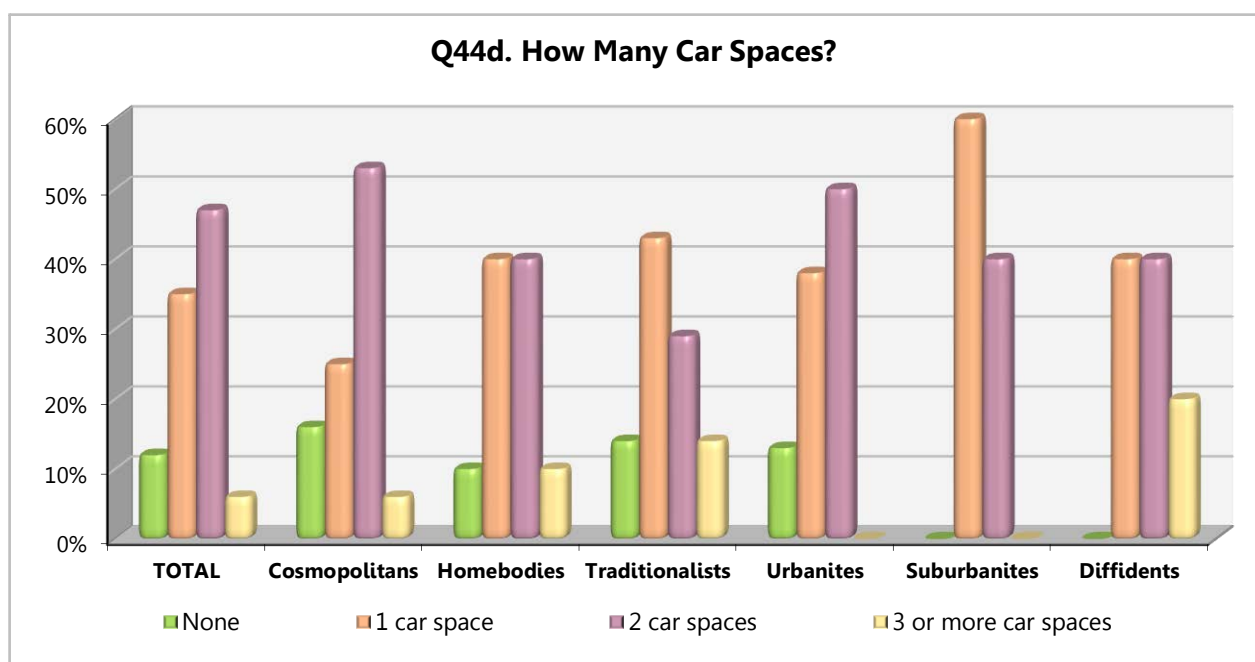
Question 44c – How many living areas would you prefer in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
1 living area	67%	66%	60%	86%	79%	40%	40%
2 living areas	25%	22%	30%	14%	21%	60%	40%
3 or more living areas	7%	12%	10%	0%	0%	0%	20%



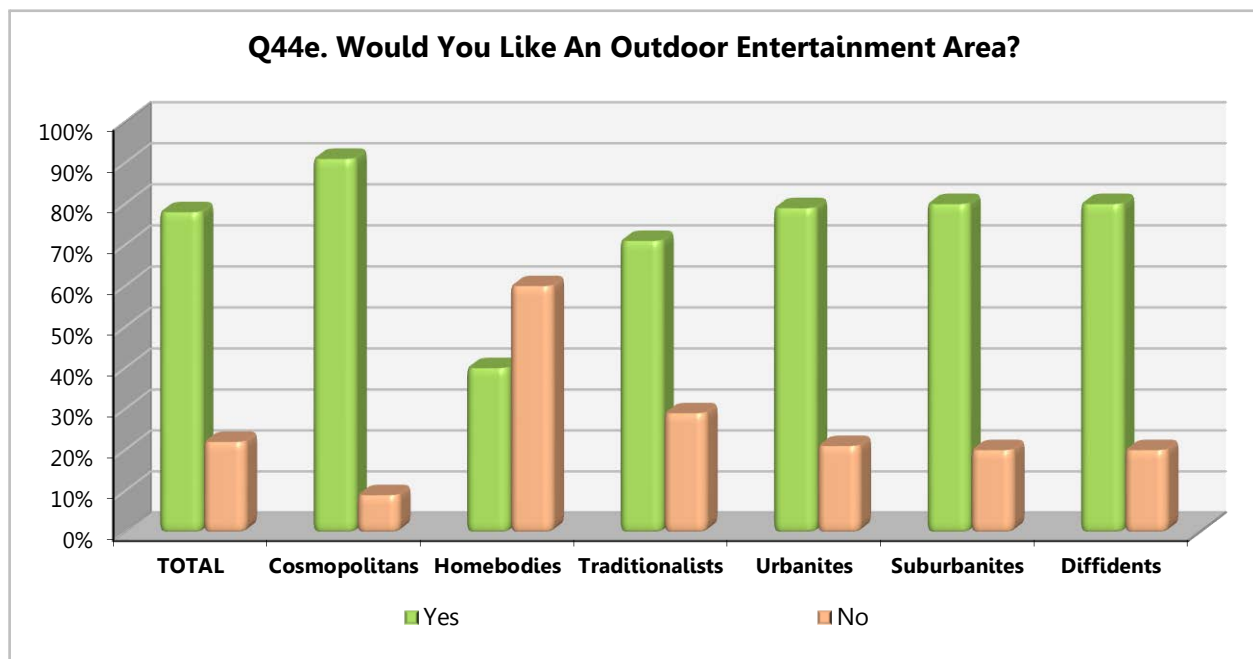
Question 44d – How many car spaces would you prefer in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
None	12%	16%	10%	14%	13%	0%	0%
1 car space	35%	25%	40%	43%	38%	60%	40%
2 car spaces	47%	53%	40%	29%	50%	40%	40%
3 or more car spaces	6%	6%	10%	14%	0%	0%	20%



Question 44e – Would you like an outdoor entertainment area in your rental property?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
Yes	78%	91%	40%	71%	79%	80%	80%
No	22%	9%	60%	29%	21%	20%	20%



4.16 Apartment Living - Attitudes (Rental)

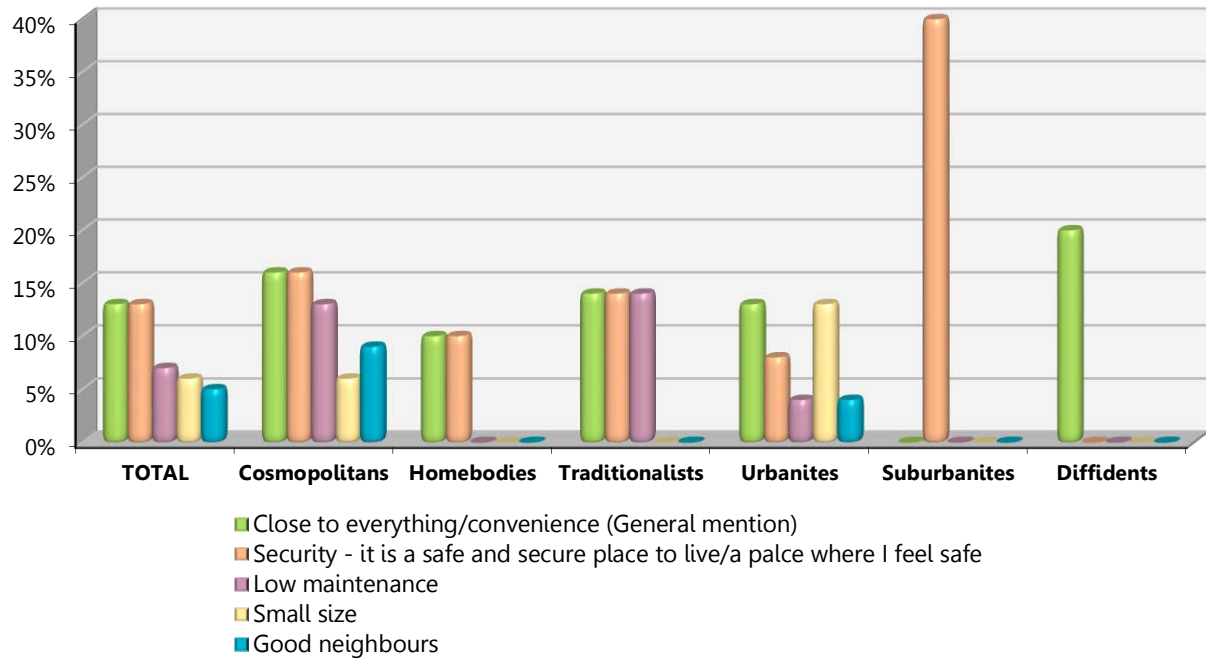
Question 45 - What would you find most attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	83	32	10	7	24	5	5
Close to everything/convenience (General mention)	13%	16%	10%	14%	13%	0%	20%
Security - it is a safe and secure place to live/a place where I feel safe	13%	16%	10%	14%	8%	40%	0%
Low maintenance	7%	13%	0%	14%	4%	0%	0%
Small size	6%	6%	0%	0%	13%	0%	0%
Good neighbours	5%	9%	0%	0%	4%	0%	0%
Convenient to the city	4%	3%	0%	0%	4%	20%	0%
Peace and quiet (tranquillity)	4%	3%	0%	0%	8%	0%	0%
Affordable/cheap rent	4%	6%	10%	0%	0%	0%	0%
Views	2%	0%	0%	0%	4%	0%	20%
Shared facilities such as laundry, storage, pool, spa and gym	2%	0%	0%	14%	4%	0%	0%
Convenient for shopping	2%	0%	0%	0%	8%	0%	0%
Location/area (General mention)	2%	0%	0%	0%	4%	0%	20%
Modern/new	2%	3%	0%	0%	4%	0%	0%
No garden	1%	3%	0%	0%	0%	0%	0%
Price - value for money	1%	3%	0%	0%	0%	0%	0%
Close to work	1%	3%	0%	0%	0%	0%	0%
Close to restaurants and cafes	1%	0%	0%	0%	4%	0%	0%
Administration	1%	0%	10%	0%	0%	0%	0%
Don't know	4%	3%	0%	0%	8%	0%	0%
No answer	33%	25%	60%	43%	25%	40%	40%

This question was asked of those respondents who answered either very attractive or attractive to apartment living (69% of the total sample). The convenience of being close to everything and the security of apartment living are the most attractive features for these respondents (13% each).

Please refer to the chart on the following page.

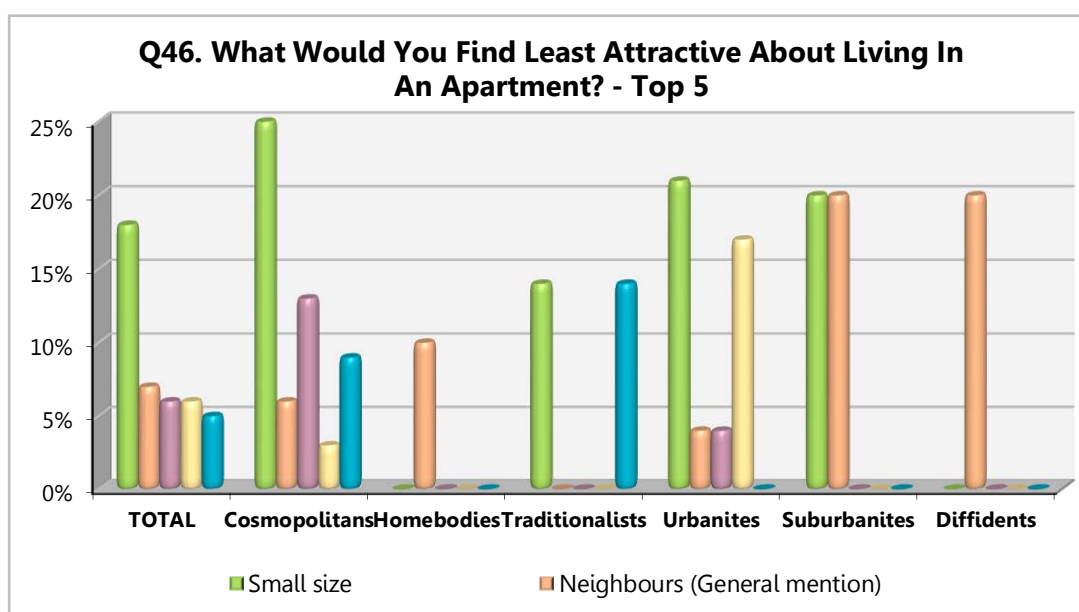
Q45. What Would You Find Most Attractive About Living In An Apartment? - Top 5



Question 46 - And what would you find least attractive about living in an apartment?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	83	32	10	7	24	5	5
Small size	18%	25%	0%	14%	21%	20%	0%
Neighbours (General mention)	7%	6%	10%	0%	4%	20%	20%
No privacy	6%	13%	0%	0%	4%	0%	0%
Price - value for money	6%	3%	0%	0%	17%	0%	0%
No garden	5%	9%	0%	14%	0%	0%	0%
Noise from other tenants	5%	6%	10%	14%	0%	0%	0%
Stairs/no lift	5%	3%	10%	14%	4%	0%	0%
Noise (General mention)	2%	3%	0%	0%	4%	0%	0%
Shared facilities such as laundry and storage	2%	0%	10%	0%	4%	0%	0%
School/Childcare (General mention)	2%	0%	0%	0%	0%	20%	20%
Congestion	1%	3%	0%	0%	0%	0%	0%
Can't have a pet	1%	0%	0%	0%	0%	0%	20%
Lack of car parking	1%	0%	0%	0%	4%	0%	0%
Location	1%	0%	0%	0%	4%	0%	0%
Nothing	1%	3%	0%	0%	0%	0%	0%
Don't know	5%	6%	0%	0%	8%	0%	0%
No answer	33%	25%	60%	43%	25%	40%	40%

This question was asked of those respondents who answered either very attractive or attractive to apartment living (69% of total respondents). When asked what they would find least attractive about living in an apartment, the small size of the apartment was the least attractive feature for 18% of these respondents.



4.17 Information Sources – Residential Areas

Question 47 - Please imagine you were seeking information on an area in which to live. Which of the following information sources would you use?

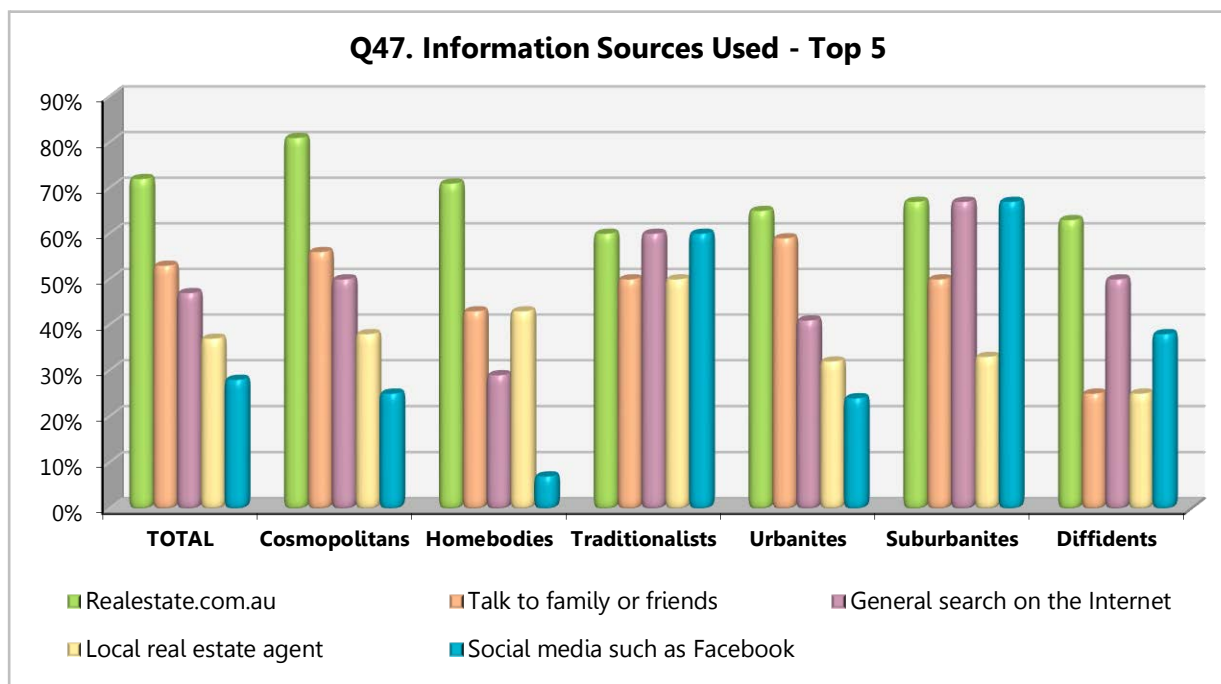
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	120	48	14	10	34	6	8
Realestate.com.au	72%	81%	71%	60%	65%	67%	63%
Talk to family or friends	53%	56%	43%	50%	59%	50%	25%
General search on the Internet	47%	50%	29%	60%	41%	67%	50%
Local real estate agent	37%	38%	43%	50%	32%	33%	25%
Social media such as Facebook	28%	25%	7%	60%	24%	67%	38%
The Advertiser	20%	17%	7%	20%	32%	17%	13%
Local paper such as the Messenger	14%	15%	7%	20%	18%	0%	13%
Visit a builders' website	13%	10%	0%	0%	24%	33%	13%
Contact an Education Agent	12%	6%	0%	20%	18%	33%	13%
Drop into a display village	11%	10%	7%	20%	15%	0%	0%
The Sunday Mail	10%	4%	7%	10%	21%	0%	13%
Other	7%	8%	14%	0%	6%	0%	0%
Not sure	1%	0%	0%	0%	0%	0%	13%

Nearly three-quarters of total respondents indicated they would research areas in which to live by visiting the realestate.com.au website (72%), while talking to family or friends was also a popular method of researching an area in which to live (53%) followed by a general search on the Internet (47%).

'Other' responses nominated by respondents include:

- Gumtree (x3)
- adelaidebbs.com.au (x2)
- University accommodation service (x2)
- Airbnb
- Flatmates
- Travellers guides

Please refer to the chart on the following page.



4.18 Country of Citizenship, Educational Information and Future Intentions

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

Question 48 - What is your country of citizenship?

Nearly a quarter of total respondents (24% or 28 respondents) are Chinese citizens, with a further 18% (or 21 respondents) citizens of Malaysia. The remaining respondents are citizens of countries around the world, including:

- Vietnam (x9)
- Brazil (x7)
- Indonesia (x6)
- Philippines (x5)
- Pakistan (x4)
- Singapore (x4)
- Canada (x3)
- Hong Kong (x3)
- Kenya (x3)
- Bangladesh (x2)
- Colombia (x2)
- France (x2)
- Germany (x2)
- India (x2)
- Taiwan (x2)
- USA (x2)
- Other (x11)

Question 49 - Which college, university or other educational institution are you studying at?

More than half of total respondents (53% or 63 respondents) study at the University of Adelaide, with a further 22% (26 respondents) studying at the University of South Australia.

- University of Adelaide (x63)
- University of SA (x26)
- Flinders University (x15)
- TAFE SA (x9)
- Eynesbury College (x2)
- Kaplan Business School (x2)
- SAIBT (x1)
- Le Cordon Bleu (x1)

Question 50 - Which course/s are you currently studying?

Courses studied by respondents vary from diplomas to postgraduate research degrees, as follows:

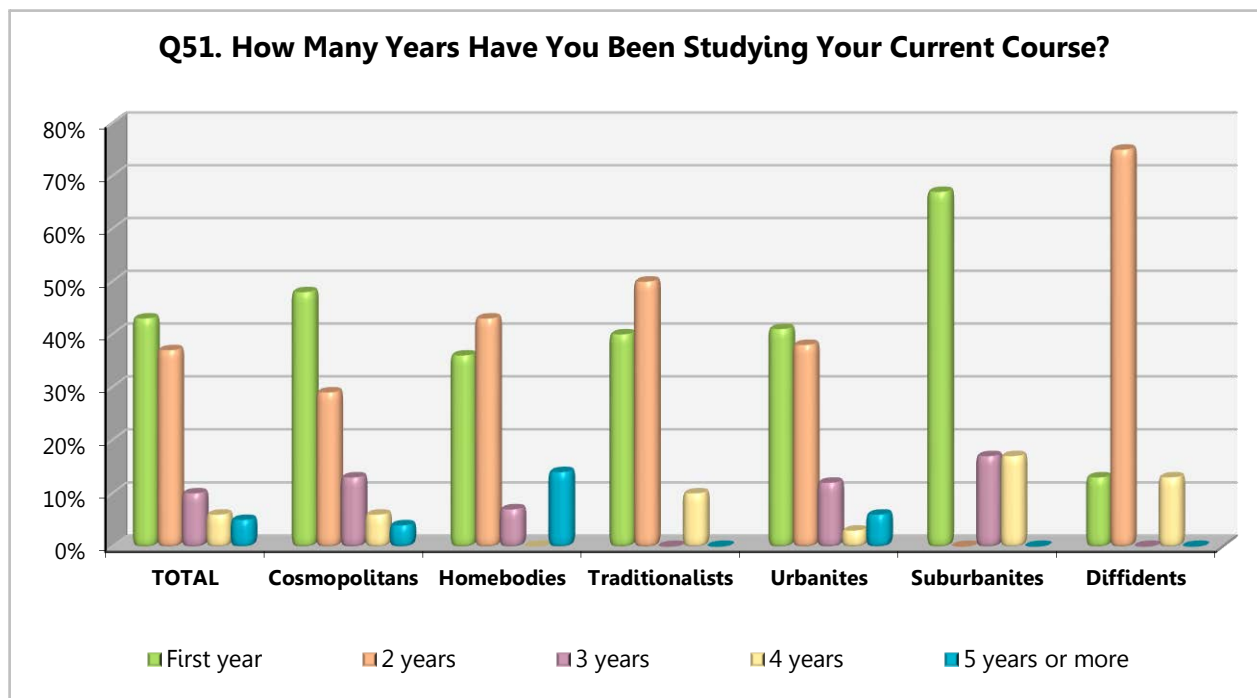
- Undergraduate Degree (x78)
- Masters Degree (x25)
- Research/PhD (x10)
- Diploma / VET (x7)

The following disciplines of study were represented by the respondents:

- Science, Technology, Engineering, Maths (STEM) (x38)
- Business, Finance, Law (x33)
- Education, Arts and Social Science (x23)
- Other / Unspecified (x8)

Question 51 - How many years have you been studying your current course?

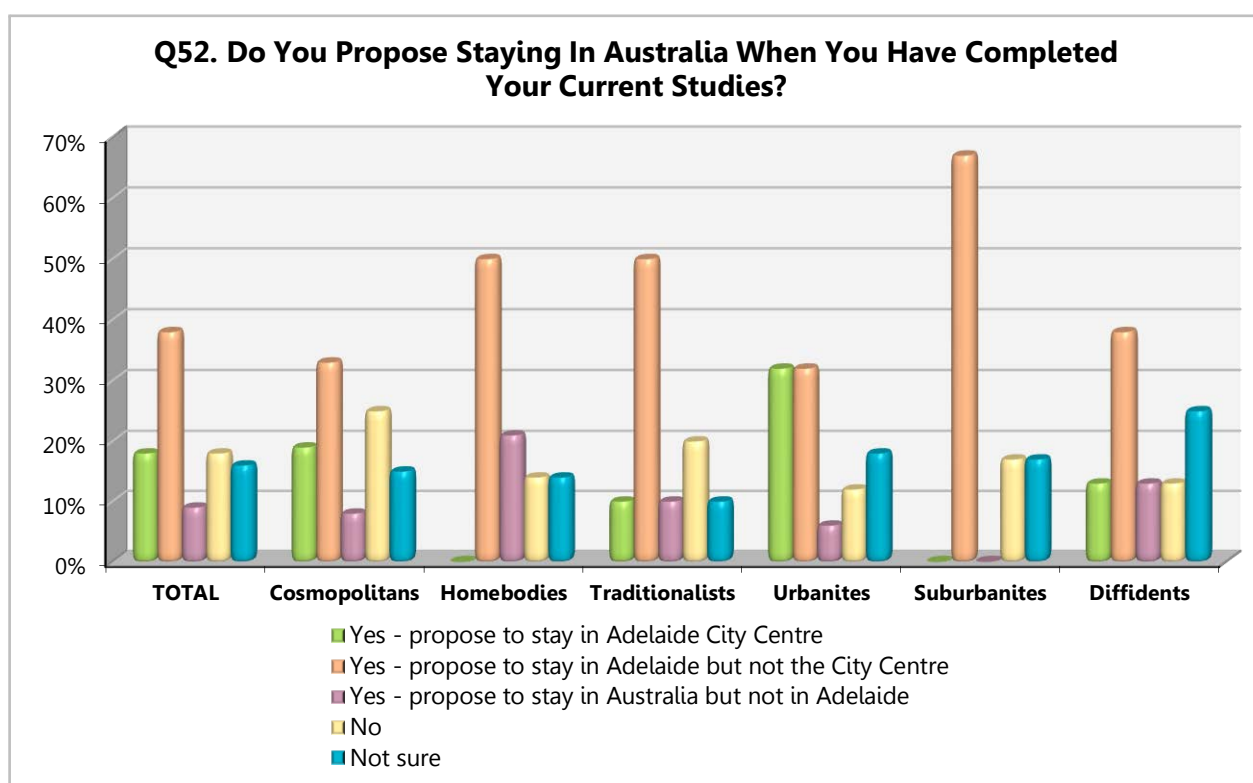
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
First year	43%	48%	36%	40%	41%	67%	13%
2 years	37%	29%	43%	50%	38%	0%	75%
3 years	10%	13%	7%	0%	12%	17%	0%
4 years	6%	6%	0%	10%	3%	17%	13%
5 years or more	5%	4%	14%	0%	6%	0%	0%



Nearly half of total respondents (43%) have been studying their current course for less than one year while 21% have been studying for three or more years.

Question 52 - Do you propose staying in Australia when you have completed your current studies?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
Yes - propose to stay in Adelaide city centre	18%	19%	0%	10%	32%	0%	13%
Yes - propose to stay in Adelaide but not the city centre	38%	33%	50%	50%	32%	67%	38%
Yes - propose to stay in Australia but not in Adelaide	9%	8%	21%	10%	6%	0%	13%
No	18%	25%	14%	20%	12%	17%	13%
Not sure	16%	15%	14%	10%	18%	17%	25%

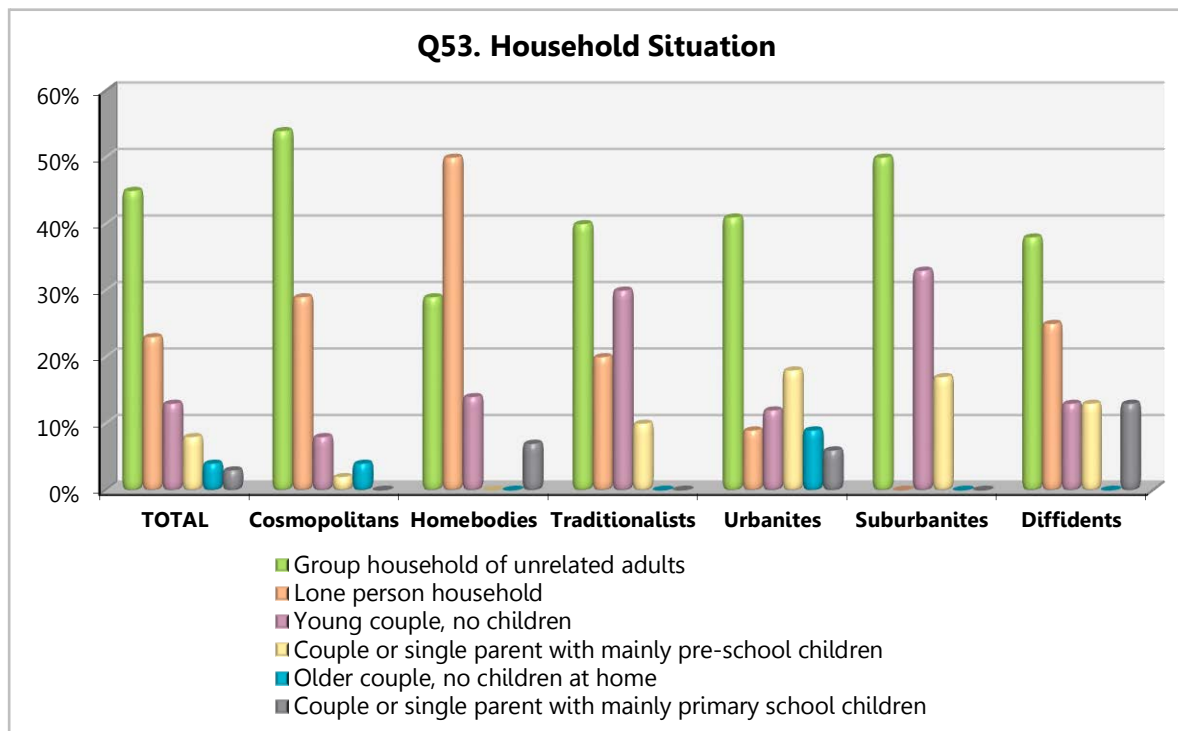


Over half of total respondents (56%) propose to stay in Adelaide when they have completed their current studies (18% in the Adelaide city centre and 38% within Adelaide). A small proportion of total respondents are likely to leave Australia once their current studies are completed (18%).

4.19 Household Type, Occupation and Income

Question 53 - Which of the following categories best describes your household situation?

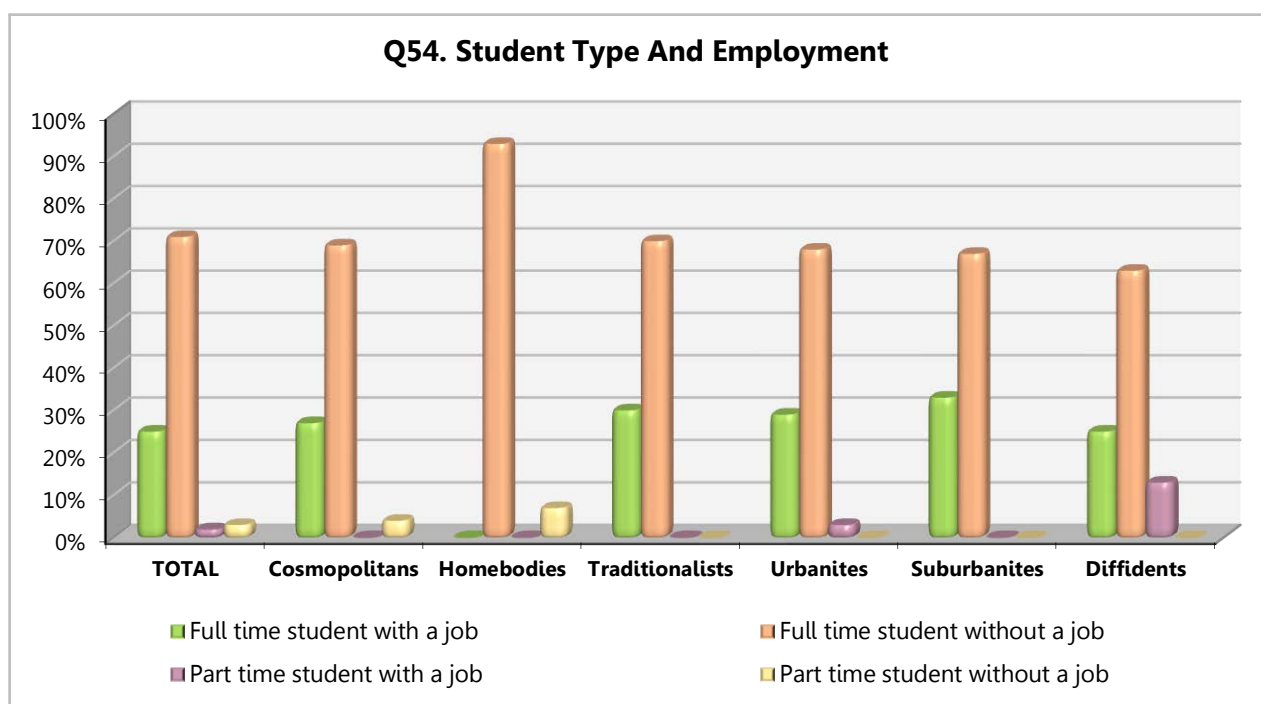
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	120	48	14	10	34	6	8
Group household of unrelated adults	45%	54%	29%	40%	41%	50%	38%
Lone person household	23%	29%	50%	20%	9%	0%	25%
Young couple, no children	13%	8%	14%	30%	12%	33%	13%
Couple or single parent with mainly pre-school children	8%	2%	0%	10%	18%	17%	13%
Older couple, no children at home	4%	4%	0%	0%	9%	0%	0%
Couple or single parent with mainly primary school children	3%	0%	7%	0%	6%	0%	13%
Couple or single parent with mainly adult children still living at home	2%	2%	0%	0%	3%	0%	0%
Couple or single parent with mainly teenage children	1%	0%	0%	0%	3%	0%	0%



Nearly half of total respondents (45%) live in a group household of unrelated adults. Nearly a quarter of total respondents live alone (23%) while a further 13% are a young couple household with no children.

Question 54 - Which of the following best describes you?

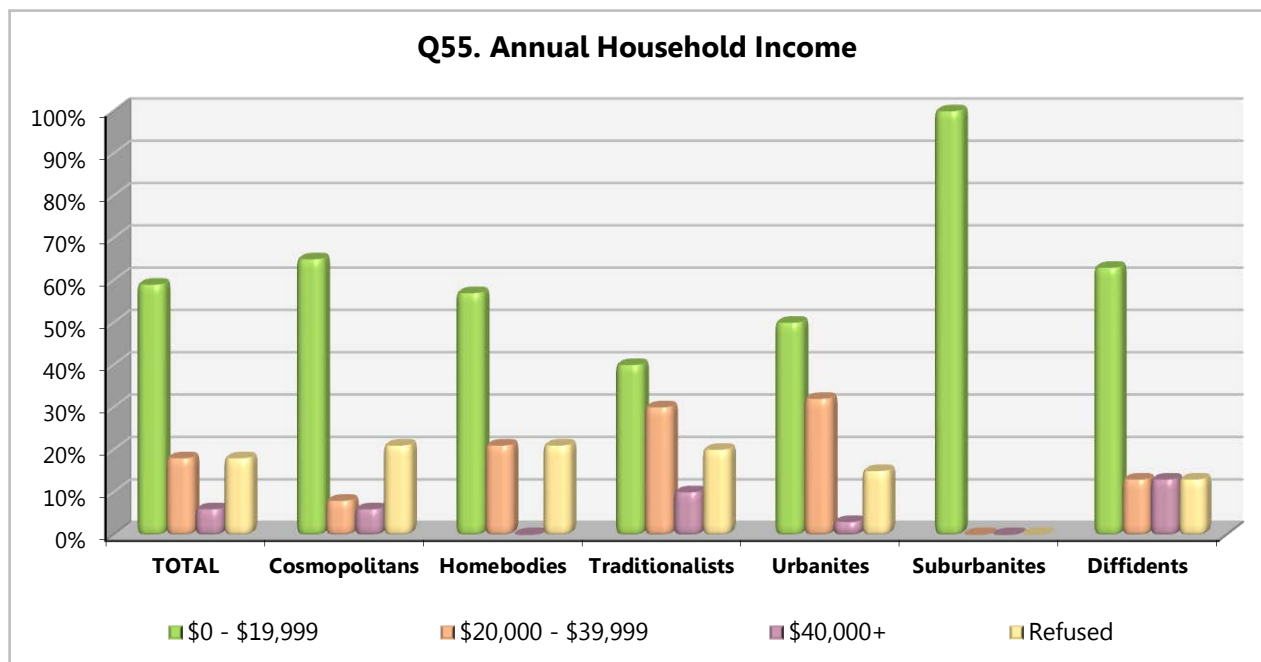
	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
Full time student with a job	25%	27%	0%	30%	29%	33%	25%
Full time student without a job	71%	69%	93%	70%	68%	67%	63%
Part time student with a job	2%	0%	0%	0%	3%	0%	13%
Part time student without a job	3%	4%	7%	0%	0%	0%	0%



Nearly all total respondents are full time students, with a quarter being employed (25%) and 71% without a job.

Question 55 - Which of the following best describes your total annual household income before tax?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidents
Sample Size	120	48	14	10	34	6	8
\$0 - \$19,999	59%	65%	57%	40%	50%	100%	63%
\$20,000 - \$39,999	18%	8%	21%	30%	32%	0%	13%
\$40,000 - \$59,999	2%	2%	0%	0%	0%	0%	13%
\$60,000+	4%	4%	0%	10%	3%	0%	0%
Refused	18%	21%	21%	20%	15%	0%	13%

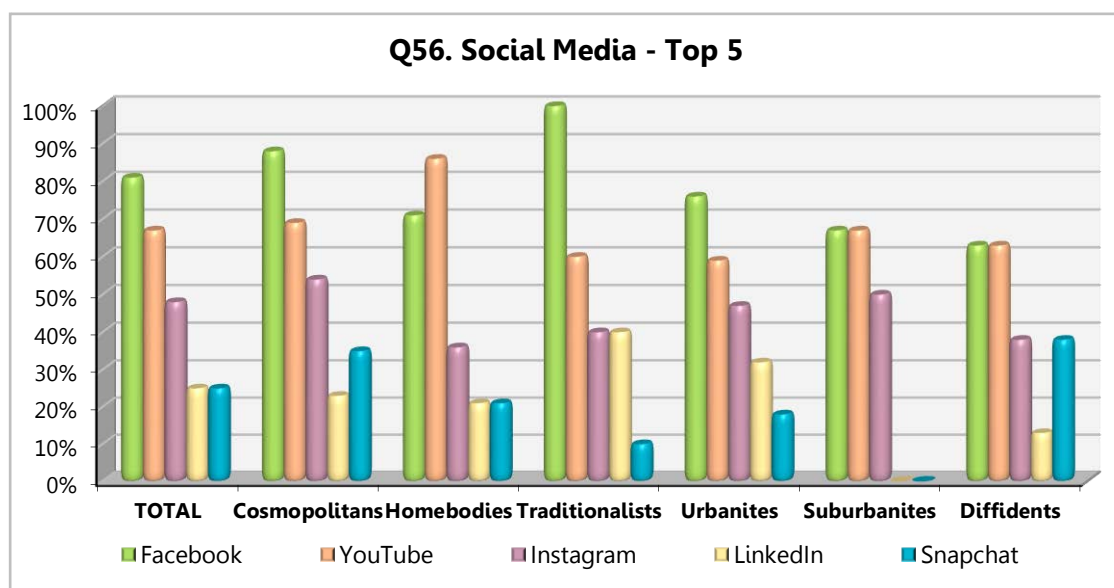


Over half of total respondents (59%) have a total annual household income before tax of less than \$20,000. A small proportion of total respondents indicated an annual household income before tax of more than \$60,000 (4%).

4.20 Social Media Use

Question 56 - Which of the following social media sites do you use at least once a week?

	TOTAL	Cosmopolitans	Homebodies	Traditionalists	Urbanites	Suburbanites	Diffidants
Sample Size	120	48	14	10	34	6	8
Facebook	81%	88%	71%	100%	76%	67%	63%
YouTube	67%	69%	86%	60%	59%	67%	63%
Instagram	48%	54%	36%	40%	47%	50%	38%
LinkedIn	25%	23%	21%	40%	32%	0%	13%
Snapchat	25%	35%	21%	10%	18%	0%	38%
WeChat	23%	23%	43%	0%	21%	33%	13%
Twitter	17%	17%	7%	30%	12%	33%	25%
Weibo	9%	8%	29%	0%	9%	0%	0%
Pinterest	8%	13%	0%	10%	6%	0%	13%
Youku	8%	6%	7%	0%	3%	33%	25%
Tumblr	4%	4%	0%	0%	6%	0%	13%
Blogspot	2%	2%	0%	10%	0%	0%	0%
Chat rooms or forums	2%	0%	0%	0%	3%	17%	0%
Other	4%	4%	0%	0%	6%	0%	13%
None	2%	2%	0%	0%	3%	0%	0%



Over three-quarters of total respondents indicated they use Facebook at least once a week (81%). A further 67% of all respondents use YouTube at least once a week, while Instagram is popular with 48% of respondents. WeChat, a popular instant messaging service for primarily Chinese users, is popular with 23% of respondents.

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 our 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. Which of the following categories best describes your current study situation? SP

Full time student	1
Part-time student	2
Former student – not currently studying - thank and terminate interview ex sample	3
Future student – will commence studying within next 12 months thank and terminate interview ex sample	4
Other thank and terminate interview ex sample	5

2. Are you an international student? SP

Yes	1
No – thank and terminate interview ex sample	2

3. Can I please confirm the suburb and postcode you currently live in and the suburb and postcode you currently study in (MAIN RESIDENCE & STUDY PLACE)?

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 study place	3
Primary study place postcode:	4

4. Gender [DO NOT ASK]

Male	1
Female	2

5. 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

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

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

7. Approximately how much time do you spend travelling from your home to where you 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

8. 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

9. I would now like to seek your opinion on a series of features that could apply to any area you might choose to live in. Please read each feature and then indicate 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.

Then please indicate whether you think this feature applies to the Adelaide CBD. SP

ADELAIDE CITY COUNCIL TO PROVIDE MAP SHOWING ADELAIDE CBD

	Importance (1 to 10)	Adelaide CBD
A good place to bring up kids		1
A good place to buy an investment property		1
A premium address		1
A safe & secure place to live		1
A tranquil place to live		1
Access to a range of entertainment options		1
Access to interesting festivals & events		1
Access to sporting facilities		1
Access to, recreation facilities		1
Bike friendly		1
Cafés & restaurants		1
Childcare facilities		1
Convenient car parking		1
Convenient for private schools		1
Convenient for public schools		1
Convenient for universities		1
Convenient for weekly shopping		1
Convenient public transport		1
Easy to walk around		1
Lots of parks with trees		1
Medical facilities and services		1
Public libraries		1
Safe areas for children to play outdoors		1
Specialty shops such as a butcher, greengrocer & newsagent		1
Tree lined streets		1
A vibrant & lively place to live		1

10. 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

11. 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

12. 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 [specify]	26

13. What is the single most important reason for choosing where you currently live? SU

	1
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14. Which of the following best describes the type of home you currently live in? SP

Single or double storey house – goto Q18	1
Single or multi-storey house terrace or townhouse – goto Q18	2
Single storey flat or unit – goto Q18	3
Multi-storey apartment	4
Other dwelling – goto Q18	5
Not sure – goto Q18	6

15. 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

16. 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

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

Own outright	1
Own with a mortgage	2
Rent but don't share with others – goto Q20	3
Rent and share with others – goto Q20	4
Rent through university-managed student accommodation – goto Q21	5
Other tenure type – goto Q17	6

18. What would you estimate to be the value of your current home? 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

Goto Q22

19. How much rent do you pay each week excluding costs such as electricity and gas? 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

Goto Q22

20. How much do you pay for your student accommodation each week? 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

21. How satisfied are you with your current accommodation? SP

Very satisfied	1
Satisfied	2
Don't know/not sure	3
Unsatisfied	4
Very unsatisfied	5

22. Which of the following statements best describes how much you know about the City of Adelaide as a place to live? When I say the City of Adelaide I am referring to the actual city centre as opposed to the inner city suburbs or North Adelaide. SP

ADELAIDE CITY COUNCIL TO PROVIDE MAP SHOWING ADELAIDE CBD

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 Q25	4
I know nothing about the Adelaide CBD as a place to live other than the name – goto Q25	5
This is the first I have heard of the Adelaide CBD as a place to live – goto Q25	6

23. 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
An attractive City to rent a home in which to live	17
A Liveable City	18
None of these	19

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

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

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

25. 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

26. 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

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

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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:

28. ***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

29. Which of the following options would best match your budget if you were to consider purchasing a new home including land? 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

30. 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

31. 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

32. 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
Other (specify)	1	2	3	4

Q32 to be cross- tabbed with Q29

33. 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

34. 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

Q35 & Q36 are to be asked of respondents who answered either very attractive or attractive to apartment living in Q32 everyone else skip to Q37

35. 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

36. 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

37. 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 q48	3
Not sure – goto q48	4

38. 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

39. 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:

40. **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

41. Which of the following options would best match the amount of rent you would be prepared to pay each week for this property? 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

42. 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

43. Taking into account your budget, to what extent would the following types of homes be attractive for you to rent? 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
Other (specify)	1	2	3	4

44. 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

Q45 & Q46 are to be asked of respondents who answered either very attractive or attractive to apartment living in Q43 everyone else skip to Q47

45. 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

46. 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

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

Local paper such as the Messenger	1
The Advertiser	2
The Sunday Mail	3
Realestate.com.au	4
General search on the Internet	5
Local real estate agent	6
Drop into a display village	7
Talk to family or friends	8
Visit a builders' website	9
Contact an Education Agent	10
Social media such as Facebook	11
Other - specify	12
Not sure	13

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

48. *What is your country of citizenship? SP*

	1
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49. *Which college, university or other educational institution are you studying at? SP*

	1
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50. *Which course/s are you currently studying? SP*

	1
--	---

51. *How many years have you been studying your current course? SP*

First year	1
2 years	2
3 years	3
4 years	4
5 years or more	5

52. *Do you propose staying in Australia when you have completed your current studies? SP*

Yes – propose to stay in Adelaide	1
Yes – propose to stay in Australia but not in Adelaide	2
No	3
Not sure	4

53. *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

54. Which of the following best describes you? SP

Full time student with a job	1
Full time student without a job	2
Part time student with a job	3
Part time student without a job	4
Other – don't specify	5

55. 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

56. 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	8
Flickr	9
Pinterest	10
WeChat	11
Weibo	12
Youku	13
Chat rooms or forums	14
Other (don't specify)	15

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