ADELAIDE CITY LIVING MARKET RESEARCH

VOLUME 5 – FOCUS GROUPS

Collaborative Thinking. Positive Outcomes.

A joint initiative of

CAPITAL CITY COMMITTEE ADELAIDE

Government of South Australia

CITY OF ADELAIDE

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Cover image: Ergo Apartments, Sturt Street, Adelaide. Image courtesy of City of Adelaide.

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.

For each market, six attitudinal segments were identified. From this, a segment labelled the 'Cosmopolitans' was identified as the primary segment for Adelaide city living. For further details of the segmentation process refer to Appendix 1 of this report and individual survey reports.

This report presents the results of the focus groups. The participants of the focus groups were primarily 'Cosmopolitans' drawn from Greater Adelaide. They were also selected so that various life stages were represented including city workers, retirees, pre-retirees, young singles and existing city residents.

The following provides verbatim comments as well as higher levels summaries of the focus groups.

Most of the participants are currently living in low density housing, outside the city, with a small proportion living in medium density housing. Not surprisingly the international students tend to reside in suburbs that are within easy reach of their respective campuses.

The participants generally perceive the positive aspects of city living to be the access to good public transport, the low maintenance of properties, the reduced dependence on motor vehicles, the walkability/ride-ability of the city, the restaurant/café scene, the Adelaide Central Market and amenities such as medical services and universities. The negative aspects of city living generally relate to parking (cost and availability including visitor parking), a perceived lack of community, the challenge of having a companion animal, the lack of open space / playgrounds especially for children and dogs, and noise (from entertainment venues and potentially neighbours).

The areas most frequently nominated as the city's major competitors for residential living were Bowden, Glenelg, the beach, Norwood, the hills/ foothills, North Adelaide and Prospect. The inner suburbs are perceived as having easy access to the city while providing a greener, more relaxed and community spirited environment.

When the participants were asked to choose one of three similarly priced properties in three different locations: City, Unley and Norwood, the contemporary Unley townhouse was the most popular followed by the relatively new city apartment in Hindmarsh Square. The least favoured was the renovated detached, single-fronted bluestone cottage in Norwood. The Unley townhouse and City apartment were both perceived to be spacious, light, low maintenance and modern.

The Unley townhouse was considered to be a 'sought after' location and had the benefit of off street parking. The city apartment being on one level was an attractive feature for some concerned with mobility. Although not the most favoured option, the Norwood cottage was considered attractive for its heritage character, outdoor space and proximity to The Parade.

The participants perceive that the city generally attracts professionals, retirees (empty nesters), students, singles and younger people and that the eastern side and south-east corner are the premium areas for city housing. These areas were reported to be characterised by quality homes, beautiful architecture, leafy streets, beautiful parks (Victoria Park) and quality restaurants and cafés in a tranquil environment. In contrast, the south-western corner of the city is perceived to be a more affordable residential area, characterised as more urban, industrial and bohemian with less of a café scene but with good access to the Adelaide Central Market.

A variety of residential building types, both local and overseas examples, were presented to the participants for discussion and preferred design. The most favoured designs were medium scale apartment developments all under six storeys, constructed from brick with balconies and with a strong residential feel. The most favoured was set back from the street behind a hedge and the building's balconies and sense of privacy were highly regarded. Heritage character and a variety of colours, materials and forms were also considered appealing. The modern, high rise apartment blocks were not considered desirable by the participants.

The participants had strong preferences for city streets that were tree lined, leafy and green with seating and wide footpaths. This style of street was considered inviting and pedestrian friendly. A number of participants considered the streets showing public transport, trams and buses to be attractive for their convenience. Any streetscape imagery used to promote the city for residential living should therefore have a very organic, green, pedestrian friendly feel.

When considering a variety of urban open space settings, including large public spaces and semi-private open spaces such as a balcony, participants favoured the large open space options which were characterised by uncrowded parks with a variety of features including trees, shade, families, dogs, public art and water. These settings were described as serene and peaceful. Roof top gardens, a balcony and a playground were not favoured. Imagery used to promote the city's open spaces should therefore incorporate water, families and dogs in a tranquil setting possibly complemented by interesting public art.

In relation to settings containing a mixture of city land-uses adjacent to public open space areas, the participants strongly favoured an intimate setting with medium scale buildings surrounding a small urban park containing wide paved areas, grass, trees and public art. This setting was described as having more lawn (grassed area) than the other images with plenty of space for kids to run around in. It was also noted that the area is wheelchair friendly.

In relation to perception of buying apartments off-the-plan, the participants did not perceive any major barriers to purchasing a home this way although some concerns were raised about the reality meeting expectations. Expectations around customisation were largely realistic with the ability to choose fixtures and fittings. Access to NBN is very important along with adequate car parking, storage options and a laundry.

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, 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 further is a shared objective of both the Government of South Australia and the City of Adelaide. A larger city population 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 partnered with the City of Adelaide and Renewal SA to undertake market research into the subject. The research will underpin city residential growth strategy of Council and Government, and is provided to industry to inform city housing and service development strategy.

The market research was undertaken by Hudson Howells, a South Australian strategic management company, 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 focus groups survey (Volume 5).

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 primarily drawn from the Cosmopolitans market segment)	51 participants (total)

This report provides a summary of the findings from the seven focus groups. Groups 2 to 7 were primarily drawn from the Cosmopolitans market segment. The segmentation analysis was undertaken as part of the Adelaide metropolitan market survey (Volume 1). For an explanation and results of this segmentation see Appendix 1.

3 FOCUS GROUP KEY FINDINGS

This section of the report provides an overview of discussion ich emerged from the group discussions. It follows the same format as the approved Moderator's Guide.

3.1 Current Home Locations

At the commencement of each group, the participants were asked to introduce themselves and provide a brief description of their home including its location. This exercise was used to settle the participants in, get them focused on the topic and provide context for points they would make as each session progressed.

Group	Location of Home	Description of Home
1 Urbanites	Seacliff Park Broadview Seacombe Gardens Morphettville Pasadena Glen Osmond Evandale Woodville South	Large 2 storey home on 900 sqm Renovated bungalow 2 storey rented Housing Trust unit Courtyard home 2 storey home on 1,000 sqm Large home on 1,000 sqm 2 storey home shared with 5 others Restored bungalow
2 City Workers	Prospect Greenacres Ridgehaven Millswood Gilberton Holden Hill	Renovated bungalow Single storey home Single storey home on ¼ acre block Renovated bungalow Large home on a small block Single storey home
3 Retireees	Pasadena Kurralta Park Hawthorn Highbury Pasadena Ingle Farm Walkley Heights Somerton Park	Single storey home in retirement village Rental property that belongs to family Traditional home with granny flat (occupied by grandson) Large traditional home Traditional family home Large traditional family home Large traditional family home Unit

Group	Location of Home	Description of Home
4 Pre Retirees	Bedford Park Adelaide Marion Highbury Adelaide Hampstead Gardens West Lakes	Traditional family home Small (one bedroom) cottage Larger traditional family home Larger traditional family home 1863 larger (3 bedroom) cottage Larger traditional family home Larger traditional family home
5 Young Singles	Magill Athelstone Rosewater West Beach One participant arrived late	Two storey traditional family home Traditional family home Traditional family home Two storey traditional family home
6 City Residents	Off Waymouth Street Carrington Street South West Corner, Hindmarsh Square Little Sturt Street Off Waymouth Street Halifax Street (east)	Townhouse (ex Kangaroo Island) Duplex (studying ex Adelaide Hills) 1880s Row cottage (ex Mount Barker) (ex Kingswood but previously lived in Spain and Italy) Old fashioned cottage (studying and casual work ex Mile End) (ex Northgate) Duplex (ex Middle East and Sydney)
7 International Students	Marion Clovelly Park North Adelaide CBD Athol Park Magill CBD Brooklyn Park	Studying at Flinders University Studying at Flinders University-Tonsley Studying at University of South Australia Studying at Adelaide University Studying at Adelaide University Studying at University of South Australia Studying at Adelaide University Studying at Adelaide University

SUMMARY – CURRENT HOME LOCATION:

Most of the participants are currently living in low density housing within a sprinkling of medium density. Not surprisingly the international students tend to reside in suburbs that are within easy reach of their respective campuses.

3.2 Perceptions of City Living

A discussion was then held to explore the general view of city living with the following comments being made:

Group	General Comments on City Living by Focus Group
1	➢ I knew people living in Carrington Street. These were lovely units with a garden area and very quiet especially on the weekends. They were also close to everything ➢ I have friend who now lives in South Terrace. The home was originally bought as an investment property ➢ My daughter who is in her mid-50s currently lives in Second Valley and she is interested in moving to the city ➢ I have friends living above the RAA building. The design is really important and the design of their apartment is really good. They work at the university ➢ My parents lived in the city when they first retired but they have since moved into a retirement village ➢ I know a young couple who live in the city but their home is small and they don't have any parking ➢ If my job was in the city I would be inclined to live in the city. The public transport is good ➢ I have looked at a residence near the Central Market but I haven't found anything yet ➢ I'd like to live in an apartment – one level and close to the parks ➢ It (city living) has a certain appeal and I like the idea of low maintenance. You don't need a car and you have time to yourself but it's expensive to own ➢ I'd like a balcony and a view of the parklands ➢ I'd like to live and walk in the city ➢ I'm renting from the Housing Trust and I have requested a move to the city or surrounding areas
2	➢ I prefer the suburbs – there's more room and it's quieter ➢ It costs more to live in the city – there are ongoing costs ➢ I hate 'Lego' houses (strata titles) ➢ I want to live in the city after the kids have grown up and finished with school and sports ➢ I could easily live in the city, eg the restaurants, but it's balancing the lifestyle with the 'toys' (boating and camping and the associated storage). There are also additional costs and charges ➢ I've looked at the city but there is a limited selection of schools (home with young kids) ➢ I've lived in Carrington Street and Halifax Street and there is an issue with car parking for older friends (ability to park close by)

Group	General Comments on City Living by Focus Group
3	➢ I would love to live in the city. I have a daughter in North Adelaide and we have been looking for properties in the city for both daughters and this has encouraged interest – like to entertain and the coffee shops and cafes ➢ Less maintenance is a big part of it – lock up and leave when you go on holidays ➢ I have a small dog – a lot of people have a small dog ➢ I would like to live in the SE corner and I like the development around the Botanic Hotel. A lot has been sold as an investment so therefore there are a lot of rentals. There's the café scene and easy access to facilities ➢ I love the city – used to frequent it with our young family almost weekly ➢ I love the city but I love animals
4	➢ I'm interested in city living – you can walk to the Market ➢ Not having a car is handy ➢ Everything is close although finding a car park can be hard ➢ I could see myself living in a terrace home in the city ➢ Wouldn't live on the major streets ➢ I love living in the city (lives in a house at the zoo) ➢ Everything's in walking distance, for example the art gallery and botanic gardens ➢ Great for catching up for coffee and the theatre
5	➢ Great lifestyle – you can cycle and use public transport and there are cool precincts ➢ It's a walkable city and not as polluted as other cities
6	➢ Easy place to live ➢ Quality of life ➢ Easy to get around ➢ Simplicity of grid layout – easy for guests to navigate ➢ Market, restaurants, arts and culture ➢ Free transport service but bus stops at 7:30pm ➢ Small provincial town (city)
7	➢ A good place with access to public transport, shops, supermarket and the Central Market ➢ Parking is not easy to find (more of an issue if you are coming from outside of Adelaide into the city) ➢ It's convenient to live in the city if you are studying at the medical campus as you have to travel to different hospitals (it's central) ➢ It's convenient (city) but hard to find a family house at a reasonable price ➢ The inner city suburbs are being transformed (gentrified) and new housing in these areas is now more expensive

Comments made on the positives and negatives of living in the city included (negatives in red text):

Suburb & Housing

- It's becoming more pleasant and visually appealing
- Living in an apartment with a gym, open space and a sense of community is like living in a hotel

Location, Access, Services & Amenities

- You can ride along the Linear Park
- It's vibrant and there's always something on
- Having the trams
- There's flexibility of ownership (community title)
- You can walk everywhere so you don't need a car
- Walking in and around the city
- Good public transport network (free trams)
- There are support facilities such as hospitals
- The closeness of the parklands
- There is not just the Central Market, there are other markets
- The universities
- Bike access has improved
- You can have parking for visitors around the city with good public transport
- Like the River Torrens
- Like the theatres and restaurants
- You can send your kids to great schools
- GoGet car sharing system is attractive (potential for expansion of this)
- Still need access to a car for example the beach and airport

General

- People want to visit you
- It's multicultural
- Adelaide is the centre for travel around Australia
- Adelaide is well positioned for different travel experiences, especially overseas guests
- It's not as hectic as Sydney and Melbourne
- It's important to consider the environment when building
- Medium and high density housing encourages CO_2 reduction

Negatives

Suburb & Housing

- Where do you have animals?
- Is there a sense of community? Needs a way to bring people into a village atmosphere
- There's a lot of noise especially in the centre (Clipsal)
- You can get the neighbour from hell
- What if there's a fire?
- If you are part of a common housing group then there are community title meetings
- It's a problem if you want to have a large group gathering (60 or more people) for a BBQ
- Hard to have a garden and a vegie patch although the community gardens are quite good
- It's mainly multi-storey
- The trees have been cut down – it looks like a desert
- The Mall looks drab
- Parking is a problem – apartments have one carpark
- There's nothing of interest in the city – it's okay for professionals
- Backyards are tiny

Location, Access, Services & Amenities

- Parking is a problem and also expensive (also noted this is not a problem in comparison to larger cities)
- Only one carpark permit per dwelling and the permit system is inflexible (city residents)
- Don't have parks for kids – limited playgrounds for younger kids
- Where you choose to live – transport can be a positive or a negative
- There are no 'off the leash' areas for dogs. If I did live in the city it would be near Victoria Park

General

- The patrons of entertainment venues (antisocial behaviour)

At the conclusion of the international students' focus group there was time available to explore the impressions of this 'new to Adelaide' group and this is what they had to say:

- Adelaide has good public transport
- It's charming
- It's quiet
- There's no traffic (compared to their home cities)
- The living cost is lower
- The weather is good
- There is open space and parks
- It's relatively safe
- It has good restaurants and places to eat (Hipster)
- It's very well planned

SUMMARY – PERCEPTIONS OF CITY LIVING:

The positive aspects of city living tend to focus on access to good public transport, the perceived low maintenance of properties, the reduced dependence on motor vehicles and the associated walkability / ride-ability of the city, the restaurant / café scene, the Central Market and amenities such as medical services and universities. The negative aspects of city living tend to focus on parking (cost and availability including visitor parking), a perceived lack of community, the challenge of having a companion animal, open space / playgrounds especially for children and dogs, and noise (from entertainment venues and potentially neighbours).

3.3 Competitor Residential Areas

The discussion then turned to areas that compete with Adelaide as a place for residential living with the following areas being nominated (areas with four or more nominations highlighted).

Area/Suburb	Number of Times Nominated
Bowden	5
Glenelg	5
Near the beach (generally)	5
Norwood	5
Hills area including foothills	4
North Adelaide	4
Prospect	4
Glenside	2
Mile End	2
Parkside	2
Thebarton	2
Walkerville	2
Brighton	1
Brompton	1
Croydon	1
Golden Grove	1
Goodwood	1
Henley Beach	1
Hindmarsh	1
Hyde Park	1
Lightsview	1
Mawson Lakes	1
Mitcham	1
Paradise	1
Semaphore	1
Somerton	1
St Clair	1
Thorngate	1
Toorak Gardens	1

As highlighted in the above table the areas perceived to compete with the city as a place for residential living tended to be the inner rim, beachside and Adelaide hills. The inner rim suburbs offer close proximity to the city, the beachside suburbs have the appeal of the ocean and the hills the opportunity for a tree change. Suburbs such as Goodwood were nominated because of easy access to bus, tram and train services with Glenelg and Somerton also being nominated because of the tram service. Mitcham was nominated because it's leafy, green with access to the train service.

Paradise was a less typical nomination in that it is an outer north-eastern suburb however it was suggested because it has the O-Bahn service, the Linear Park, lots of open space and is close to the foothills.

Closer to town Prospect was nominated because it is "going ahead in leaps and bounds" and Walkerville because of its walking trails. Bowden was nominated five times with the benefit of NBN access which Adelaide currently doesn't.

It was noted that Norwood has similar advantages to the city but lacks the cultural impact. North Adelaide offers good shopping and lifestyle without the city's hustle and bustle but is still very close to the city.

There is a perception that the suburbs offer a better sense of community than the city, are mature and have good parks (including dog parks) with lots of playgrounds (better suited to families). They also have coffee shops with easy parking.

The international students' group claimed that rental properties a few kilometres out of the city are cheaper than properties in the city.

SUMMARY – COMPETITOR RESIDENTIAL AREAS:

The areas most frequently nominated as the city's major competitors for residential living were Bowden, Glenelg, near the beach (generally), Norwood, hills area including the foothills, North Adelaide and Prospect. The inner suburbs are perceived as having easy access to the city while providing a greener, more relaxed and community spirited environment.

3.4 Housing Type and Location Preferences

The topic then turned to budget and pricing with the following types of home at a similar price point located in the city, Unley and Norwood being discussed.

City

Unley

Norwood

All three properties were priced around $750,000 but different insofar as the city property is an apartment in a high rise development – The Conservatory on Hindmarsh Square, the Charles Street Unley property is a dual level townhome built by Scott Salisbury and the Hall Street Norwood property is a completely renovated bluestone cottage, very close to The Parade and on a Torrens Title. The features of each home were reviewed prior to the discussion (online via realestate.com.au).

The participants in each group were then told they had enough money to buy one of the homes which they would live in (not an investment). They were therefore forced to choose one of the three. The following table summarises which of the properties were selected by each group.

Group	Participants	City	Unley	Norwood
1	Urbanites	3	4	1
2	City Workers	1	2	3
3	Retirees	1	5	2
4	Pre-retirees	1	4	2
5	Young Singles	2	3	0
6	City Residents – Recent Movers	4	2	1
7	International Students	3	3	2
Total		**15**	**23**	**11**

The reasons for selecting each property are summarised by focus group.

City - Group 1

- Like to be in the heart of the city – it's vibrant
- Like the open plan kitchen
- Like the pool
- It's on a single level
- It has an outlook
- The floorplan is more generous
- Like the aesthetics and the convenience
- Like the high ceilings and windows
- Like the natural light and the balcony
- It's lovely, spacious and modern
- You can move in and do nothing

City - Group 2

- Like the views from the apartment
- Like the layout of the apartment
- Like the location

City - Group 3

- Not two storey and mobility is important
- The apartment is well located, clean and open with a nice balcony

City - Group 4

- It's on a single level
- It has a pool and gym
- It's close to everything (well located)

City - Group 5

- Quite spacious
- A really convenient spot
- It has a pool and gym (it would drive people to use the gym and pool)

City - Group 6

- Lock up and leave
- No garden (less maintenance)
- No access from outsiders (security)
- The bigger the place the more stuff you accumulate (so smaller is better)
- Great views
- (One participant who selected this property noted they wouldn't choose a home with only one carpark)

City – Group 7

- Has more services – pool and gym
- (also noted that noise could be a problem and that Adelaide properties will face competition in the future from the number of apartments being constructed)

Unley – Group 1

- Location and the town home
- The greenery (outdoor space)
- Brand new
- No maintenance required

Unley – Group 2

- It's a larger home
- It has a decent size balcony
- Unley has good schools

Unley – Group 3

- It's value for money
- It requires less maintenance (than an older home)
- It provides easy access
- The corporation fees would be low
- It has two car parks
- It has a modern outlook
- It offers privacy and some outdoor space
- It is close to the shops and public transport
- It has three bedrooms
- It is 'lighter' than Norwood
- It looks nice inside

Unley – Group 4

- It's a family home (enough room)
- It's neat and clean
- It has all the 'mod cons'
- It's reasonably new – low maintenance
- It has big windows with lots of natural light
- It has a double garage
- It's close to the beach and the city

Unley – Group 5

- It's perfect for work (proximity)
- The layout is better than the other two
- It's nice and modern
- It's a low maintenance property

Unley – Group 6

- Good location and sought after location
- The land size is right
- Has a double garage
- (One respondent noted that the choice is based on where you are in your life – life- stage)

Unley – Group 7

- Has access to good schools
- Has a bit more space making it easier to sell in the future
- Would require lower maintenance than an older house
- Value in being close to the CBD

Norwood - Group 1

- Like old homes and it's renovated
- Has a bit of a backyard
- Like Norwood – next best thing to the city

Norwood - Group 2

- Norwood is close to the city, restaurants and the Adelaide Oval
- It has three car parks
- There's somewhere to put the laundry
- It has a little bit of land

Norwood - Group 3

- It's on a Torrens Title (no corporation fees)
- It has a nice ambience
- It is close to The Parade (and shops)
- There are two bedrooms on one level
- It is a heritage cottage
- It has an outdoor area with 'terra firma'

Norwood - Group 4

- It has the charm of older buildings (like older buildings)
- It's a defined space (not Community Title) and on a corner block

Norwood - Group 5

- No votes – didn't like the layout

Norwood - Group 6

- Prefer a character home
- It's a family home
- Like the timber floors

Norwood - Group 7

- Has quite a bit of space – you could have a small pet
- It's quaint and has a bit of history behind it
- It's accessible
- It's not as busy as the CBD
- It's a corner house (detached) not a townhouse

SUMMARY – HOUSING TYPE AND LOCATION PREFERENCES:

When the participants were forced to choose one of three similarly priced properties, 23 chose the contemporary Unley townhouse, 15 the relatively new city apartment in Hindmarsh Square and 11 the renovated detached, single-fronted bluestone cottage in Norwood. The city apartment was perceived to be light, modern, with great views, spacious, low maintenance with the added benefit of being on one level (mobility). The Unley townhouse was also perceived to be spacious, light, low maintenance and modern with the advantages of Unley's 'sought after' location and parking for two cars. The Norwood cottage was favoured because of its heritage, charm, character and outdoor space plus its proximity to The Parade (shops, cafés, etc).

3.5 Perceptions of City Residents

The participants were then asked which types of people they felt would be attracted to city living with the following being suggested.

Group	Types of People Attracted to City Living
1	Pre-retirees and retirees Singles Young professionals with no kids or young kids
2	DINKS Separated couples – for the husband Single first home owners Students Well off semi-retired people Young professionals Younger people (Investors)
3	Families Professionals Retirees looking to downsize (who don't have pets) University students Younger people (Investors and second property for country people)
4	Couples in general Empty nesters More affluent people People who are time poor (so much that's free they can do in the city) Retirees Young families (tending to move into the city and families are generally getting smaller) Young ones who don't want to go to the outer suburbs (becoming less attractive to this group) Young professional couples (especially those working in the city)
5	Older professionals Students Young professionals (Difficult with kids and not suited to pensioners – too expensive and 'loud')
6	Please refer to note below.
7	Not discussed with the international students' group (very limited knowledge of city living)

During this discussion it was noted that having companion animals is important with access to doggy day care being suggested.

It was also noted by the city residents' group that the new buildings being constructed have smaller apartments which are geared for singles and DINKs and this is unfortunate (doesn't contribute to diversity). These buildings are also considered to have poor energy efficiency (challenge to find something green including nowhere to charge an electric car). They went on to say that the shift to apartments has compromised the character of the city. In additionit is perceived that Adelaide has a tendency to opt for cheap and nasty. The quality of construction is regarded as important along with design.

SUMMARY – PERCEPTIONS OF CITY RESIDENTS:

The city is perceived to attract professionals, retirees (empty nesters), students, singles and younger people generally.

3.6 Perceptions of Premium City Living Locations

The participants were then given three home purchase budgets - up to $400,000 (budget location), $400,000 to $800,000 (mid-range location) and more than $800,000 (premium location) and asked to place a sticker on a large map of the CBD for each purchase with an orange sticker signifying the budget location, the yellow sticker the mid-range location and the green sticker the premium location.

Images of the maps for each of the seven focus groups follow.

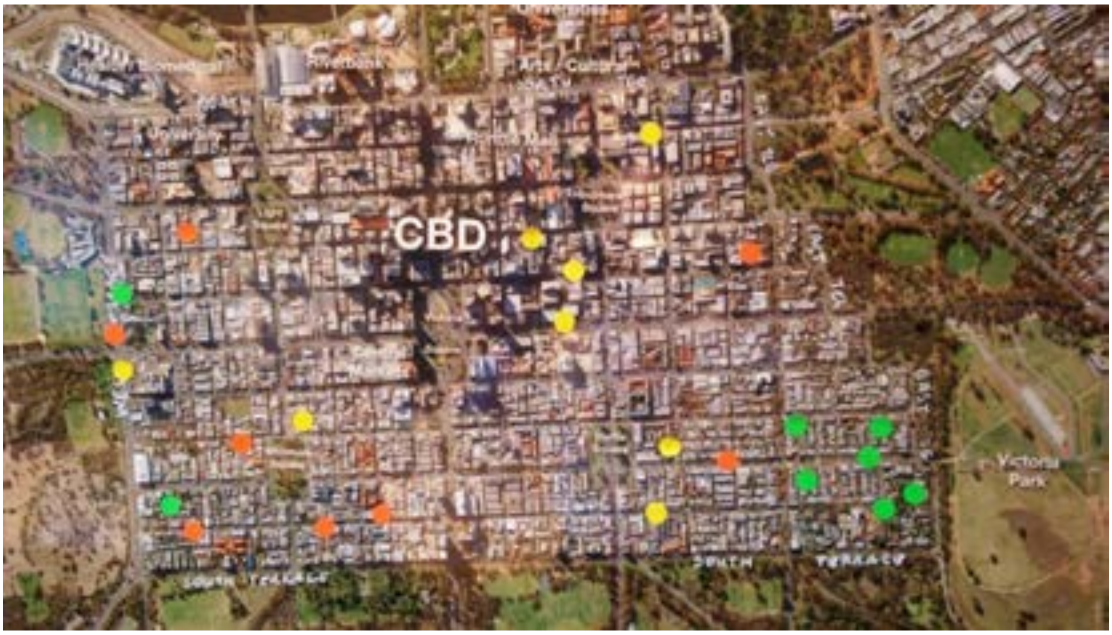
Group 1 Urbanites - Map

Group 1 defined the eastern side of the city as the premium location for residential living with the south-western corner being chosen as the budget location. The southern side of the city was selected as the mid-range location.

Group 2 City Workers – Map

Group 2 also predominantly defined the eastern side of the city as the premium location for residential living with the southern side being chosen as the budget location and the mid- range location.

Group 3 Retirees - Map



Group 3 predominantly defined the south-eastern corner of the city as the premium location for residential living with the western side being mainly chosen as the budget location. The eastern side of the city was mainly selected as the mid-range location.

Group 4 Pre-Retirees – Map

Group 4 defined the south-eastern corner of the city as the premium location for residential living with the south-western corner mainly being chosen as the budget location. The eastern side of the city was selected as the mid-range location with a three participants choosing the Hindmarsh Square vicinity.

Group 5 Young Singles - Map

Group 5 predominantly defined the eastern side of the city as the premium location for residential living with the south-western corner being chosen as the budget location. The eastern side of the city was mainly selected as the mid-range location. All participants in this group aspire to home ownership and potentially an investment property.

Group 6 City Residents - Map

Group 6 defined the south-eastern corner of the city as the premium location for residential living with the south-western corner mainly being chosen as the budget location. The southern side of the city was selected as the mid-range location.

Group 7 International Students - Map

Group 7 was challenged by this exercise reflecting their limited knowledge of city living. They predominantly defined the northern side of the city as the premium location for residential living with the southern side being chosen as the budget location. The mid to eastern side of the city was mainly selected as the mid-range location.

The participants were asked what stood out when they looked at the map of the city with the following comments being made:

- The surroundings space – the parklands
- The greenery
- The public transport network
- The wide streets
- The bike lanes
- The walking tracks
- The village like high streets
- The retention of older buildings – the quaintness this brings
- The museum, library and art gallery
- The size of the buildings – the scale
- The surrounding houses
- The space available for community gardens

Specific comments made in relation to areas of the city included:

South-Western Corner

- This is a more industrial area
- It's less attractive than other parts of the city but there's quite a lot of development happening (hasn't had a major upgrade)
- It's more bohemian (hippy and close to markets)
- There's less scenery
- It's a worker cottage area with these cottages being renovated
- Apartments are going in on the western side of the city
- Presents a good opportunity for capital growth
- Less expensive area – you can buy for less than $400,000 in this area
- Not far from the parklands and green space although noted by one participant that these are "not parks you would walk through"
- Proximity to Adelaide High and the new hospital
- It's a bit more isolated from the café scene but it's near the Market
- I like Gilbert Street – it's close to cafes and parks and you can park on the street
- The homes are small but not that small
- You can afford something bigger with a smaller budget

Eastern Side

- I love East Terrace
- It has charming beautiful homes including more traditional homes and cottages
- It has older buildings
- Victoria Park is the biggest park and has less traffic
- There are properties on big blocks
- It's close to North Terrace
- It's more boutique
- It has lots of 'enjoyment room'

- It has good public transport
- It's close to parks
- It's close to hospitals
- There are lots of eateries and cafes (without the riff-raff)
- This is the premium city location, quieter with less traffic
- There are beautiful homes and architecture
- It's nice to walk around
- The south east corner is quiet
- Hutt Street has come a long way
- It's close enough to go to the Adelaide Hills (has views of the hills)
- South Terrace has a lot to offer
- It's like staying in the city but getting out
- The Victoria Park area is closer to Burnside and Norwood
- Tranquil and good investment potential for the rental market
- The eastern side is more residential
- You can walk to the shops, bars and Clipsal
- Has nicer parks

Finally the participants were asked if they felt there was anything missing from the city if they were to choose it as a place to live with the following observations being made:

- The city attracts less fortunate people so you need to design to allow for this
- The city is looking tired. It's dirty and there are empty shops and it's letting Adelaide down
- Places like Hutt Street are vibrant but the rest of the city is dead
- Parking is a problem – it's ridiculous and expensive
- There are a small number of schools
- Lots of big corporates have left for the eastern seaboard – the head offices have gone
- There are few childcare facilities with the existing facilities booked to capacity
- Adelaide tends to shut down after hours
- The Riverbank is poor – there's nothing there – nothing to attract you and keep you there (countered by the new RAH which will bring people in). It should be possible to do more with the River Torrens precinct
- Needs a drawcard – an event space with free concerts – a hub where you can bring together a whole heap of people
- Adelaide is successful at events and festivals but there's not much happening in between times – is the population there to sustain it?
- You can't take dogs on the tram or to cafes
- The availability of car parking and cheaper parking
- Properties on Torrens Titles (depending on corporation fees)
- There's a lack of good architecture (in new constructions)
- Adelaide is losing something that says Adelaide – beautiful architecture
- There's a lack of character and charm
- Everything closes too early – especially the nightlife
- The skate park is no longer there
- It's a shame the river (Torrens) is so polluted. Melbourne and Sydney have 'stuff' happening around the river
- Public transport is better but 'not there yet'

- Improve bike access as the city is such a great place for riding – Europe does it really well
- There aren't enough beds in the new hospital
- Cutting a road through the parklands is a disgrace (O-Bahn)
- RAH site should be returned to parkland
- The increase in begging and homelessness is bad
- Lots of businesses are closing so why are more office buildings being constructed when there are so many vacancies
- If you want more people in the city you need to entice them
- There is just one cinema in the city

Other comments included:

- Could be headed towards a university town – research centre
- Target medical research and health training – another statement piece like SAHMRI
- It's very important for everyone to have their personal open space
- Small bars are a huge positive
- We don't do open space very well
- I love the diversity of the city
- South Australia has great architecture but we don't love it enough (there are great examples of architecture in European cities)
- We created our own community garden

SUMMARY – PERCEPTIONS OF PREMIUM CITY LIVING LOCATIONS:

The eastern side of the city and the south east corner in particular are regarded as the premium areas for housing in the city. The area bounded by East Terrace is perceived to be characterised by quality homes, beautiful architecture, leafy streets, beautiful parks (Victoria Park in particular) and quality restaurants and cafés in a tranquil environment. In contrast the south western corner of the city is perceived to be the more affordable residential area characterised as more urban industrial and bohemian with less of a café scene but with good access to the Central Market.

3.7 Built Form Preferences

The next discussion focused on built form with the following images being considered.

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The following comments were made in relation to the above images.

Group	Built Form Comments
1	Image 6 – private (nobody looks into you) , green, trees and smaller – preferred by 5 participants Image 5 – crisp, looks well designed, prefer the architecture – preferred by 2 participants Image 4 – heritage, a part of history, might have high ceilings – preferred by 1 participant
2	Image 7 – loft apartments, high ceilings, has shops – preferred by 3 participants Image 6 – more like a home – preferred by 2 participants Image 4 – heritage, sense of history – preferred by 1 participant
3	Image 6 – clean lines, green trees and hedge, looks liveable – preferred by 4 participants Image 4 – old and intricate and you don't get it anymore – preferred by 3 participants Image 3 – has trees, easy access - you can park out the front but doesn't look too good on the outside – preferred by 1 participant
4	Image 4 – heritage building with arches, gables and heritage colours, looks homely, an interesting style with pleasing layout, shape and form (eg shape of windows) – preferred by 6 participants Image 7 – is very different, has character, greenery and a coffee shop – preferred by 1 participant
5	Image 7 – has character, old style (homely), nice lines and has a café/shop - preferred by 4 participants Image 6 – lower rise, has balconies and will age well – preferred by 1 participant
6	Not covered for Group 6 – City Residents
7	Image 5 – modern, doesn't look too small and appears to be in a quiet area – preferred by 2 participants Image 2 – modern looking, well built, can have a hanging garden, overlooks green spaces, not blocked by other buildings (sunlight not blocked) and the building next door has a rooftop garden – preferred by 2 participants Image 1 – apartments are larger and more likely to have services like a pool and gym – preferred by 1 participant Image 7 – on Central Park, right height, compact and a cosy neighbourhood – preferred by 1 participant Image 6 – has a splash of green, neither high nor luxurious but homely and in a nice neighbourhood – preferred by 1 participant Image 3 – quiet, low rise with not too many tenants and you can park out the front – preferred by 1 participant

SUMMARY – BUILT FORM PREFERENCES:

When asked to choose a preferred built form the most favoured design was a four storey apartment set back from the street behind a large green hedge. The building's balconies and sense of privacy were well regarded. The second most preferred design was the East End Market development with its heritage character and colours and described as having a pleasing layout, shape and form. The third most favoured design was the six storey New York apartment building which was also described as having character, a homely style with greenery and a shop or coffee shop. It is noted that the modern, high rise apartment blocks were not considered desirable.

3.8 City Streetscape Preferences

The same exercise was undertaken with images of city streetscapes.

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The following comments were made in relation to the above images.

Group	City Streetscape Comments
1	Image 10 – its green, looks beautiful, you'd never know it's part of the city – preferred by 5 participants Image 13 – has wide pavements, trees and seating, a feeling of openness, you would feel safe – preferred by 3 participants
2	Image 10 – it's like living in an avenue – preferred by 5 participants Image 9 – I like the tram and the trees – preferred by 1 participant
3	Image 10 – it's green, looks healthy – doesn't look like the city, more like a country lane – preferred by 6 participants Image 13 – has potential and looks nice with the red brick building in the background and you can also see the sky – preferred by 1 participant Image 9 – I love the tram and public transport – preferred by 1 participant
4	Image 10 – 'Oxygen' – a green, peaceful suburban feel with trees that provide a buffer and soften the landscape – preferred by 7 participants Image 13 – looks new, young and vibrant – preferred by 1 participant
5	Image 10 – stands out – less dense and populated – preferred by 2 participants Image 13 – very inviting, pedestrian friendly landscaping, wide open – preferred by 2 participants Image 8 – like Rundle Street, old school feel and modern – preferred by 1 participant
6	Not covered for Group 6 – City Residents
7	Image 9 – very tidy with a mix of trees and buildings and the convenient tram – preferred by 4 participants Image 11 – has shops near home, restaurants (lazy at cooking), pavement and trees – preferred by 3 participants Image 12 – access to public transport in the middle of the city – preferred by 1 participant

SUMMARY – CITY STREETSCAPE PREFERENCES:

When asked to choose a preferred city streetscape the most favoured design by a huge margin was a tree lined, leafy green setting. This streetscape elicited comments such as it's green, looks beautiful, you'd never know it's part of the city. The second most preferred streetscape was characterised by a wide pavement with trees and seating with it being described as inviting and pedestrian friendly. The third most favoured design included the beloved tram complemented by a mix of trees and buildings. It is clear that any streetscape imagery used to promote the city for residential living should have a very organic, green, pedestrian friendly feel.

3.9 Open Space Preferences

The same exercise was undertaken with the open space images.

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The following comments were made in relation to the above images.

Group	Open Space Comments
1	Image 19 – it has space, shade, trees, dogs and kids paddling in the water – preferred by 7 participants Image 15 – like the slippery dip and the trees, it's a place to take the grandkids – preferred by 1 participant
2	Image 17 – it has the city in the background (similar to the Torrens), it's new, designed and has variation in height – preferred by 3 participants Image 19 – it has open space, dogs and kids – preferred by 2 participants Image 14 – it provides outside activities and it's suited to all ages – preferred by 1 participant
3	Image 19 – it family and pet friendly and green with trees and water – preferred by 4 participants Image 17 – it has potential and has character and architecture – it's nicely landscaped and good for kids – preferred by 2 participants Image 16 – I like the group of people sitting around and I also like the notion of rooftop gardens for city living – preferred by 1 participant Image 14 – I like the ground level open space – it's green and not too enclosed – preferred by 1 participant
4	Image 17 – it's green with the city in the background – it's beautiful, provides fun for the kids and is enjoyable for the adults, it's a creative use of open space with grasses and water – preferred by 4 participants Image 19 – has water and is serene and peaceful – preferred by 2 participants Image 15 – like the gum trees, has a natural look and is suitable for kids – preferred by 1 participant
5	Image 19 – has a lake (water looks clean), it's open but you can still see the city in the background, can use it for dogs if you live in the city – preferred by 2 participants Image 17 – an interesting design – not just a flat space – preferred by 2 participants Image 16 – like the thought of having the family over although the area depicted might be too small for a family gathering – preferred by 1 participant Image 14 – a cool spot to hang out with the neighbours – preferred by 1participant
6	Not covered for Group 6 – City Residents
7	Image 19 – has water with a large open space and trees, a nice place to go – preferred by 4 participants Image 17 – it's close to the city, is spacious and has water with an interesting playground – preferred by 3 participants Image 14 – it's close to where you live and has a social green space that's smaller and enclosed with lots of sunlight even with surrounding tall buildings – preferred by 1 participant

Group 5 also noted that it's important to have shared open space which is important for catching up with friends and family versus a public open space – in essence an open space where you can have people over that also provides an opportunity to make new friends. There was also a view expressed about having a space where you can be alone (find solitude) if that's what you are seeking. Another participant in Group 5 stated that they would like a balcony (a private open space) to get outside.

SUMMARY – OPEN SPACE PREFERENCES:

When asked to choose a preferred open space image the most favoured design by a significant margin was a setting characterised by an uncrowded space with trees, shade, families and dogs paddling in what appears to be a small lake. This setting was described as serene and peaceful. The second most preferred streetscape was characterised by interesting public art in the form of a bridge over a waterway with a mix of vegetation and city buildings as a backdrop. These were the only two designs that resonated with the majority of the participants. It is preferable that imagery used to promote the city's open spaces incorporate water, families including dogs in a tranquil setting possibly complemented by interesting public art.

3.10 Land Use Integration

The same exercise was undertaken with images of integration with retail, commercial, recreational and cultural precincts.

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The following comments were made in relation to the above images.

Group	Land Use Integration Comments
1	Image 20 – you can walk around this space and let the children run around, it will grow bigger and better, it's wheelchair friendly and has buildings around but you don't notice them – preferred by 6 participants Image 21 – this space looks like it's in a university precinct, it's peaceful but in a happening area – preferred by 1 participant Image 24 – like this urban garden – preferred by 1 participant
2	Image 22 – this is open with lots of room and old (character) buildings – preferred by 3 participants Image 23 – like the wide boulevard, this design integrates play, pedestrians, retail, open space and structure, it has a rhythm and playfulness – preferred by 2 participants Image 20 – it's good for the kids and dog walking, there are birds in the trees and the paths aren't straight – preferred by 1 participant
3	Image 20 – looks clean and uncluttered and has a lot more grass area than the other examples – preferred by 7 participants Image 24 – like the rooftop garden – preferred by 1 participant
4	Image 24 – utilisation of space usually left vacant, rooftop gardens encourage a sense of community – preferred by 4 participants Image 22 – it's open to all, a great shared space – preferred by 2 participants Image 21 – high rise buildings with greenery to relax in – preferred by 1 participant
5	Image 22 – older museum and modern public art with wide footpaths for pedestrians – preferred by 3 participants Image 23 – a cool city – preferred by 1 participant Image 24 – greenery with a productive garden – preferred by 1 participant
6	Not covered for Group 6 – City Residents
7	Image 21 – It's modern, very bright with a large space in the middle of buildings which have big company offices and ground floor food places and shops – preferred by 5 participants Image 22 – a mix of old and new with space in the middle to chill out in (greenery and see the sky) – preferred by 2 participants Image 24 – a large green space in NY with a rare opportunity for gardening – preferred by 1 participant

SUMMARY – LAND USE INTEGRATION

When asked to choose a preferred integration image the most favoured design by a large margin was a more intimate setting incorporating grassed areas, paved pathways, trees and public art with a backdrop of city buildings. This setting was described as having more lawn (grassed area) than the other images with plenty of space for kids to run around in. It was also noted that the area is wheelchair friendly. The other four images were equally favoured.

3.11 Buying Off the Plan and Customisation

The participants were asked what they felt about buying off the plan with the vast majority of participants not having an issue with this. Comments made included:

- I bought an investment property off the plan. Everything was ticked and I had confidence the plan could produce a good property
- There is an advantage with stamp duty concessions when buying off the plan (savings if buying off the plan)
- The way space looks in a render can look different once it is built
- Display apartments are an advantage – it needs the support of something tangible (very helpful compared to simply looking at a plan)
- It can be a gamble for young people if the company goes 'belly-up'. You can lose your deposit

The participants were largely pragmatic in terms of their expectations of customising an apartment with customisation limited to the selection of fixtures and fittings. Their expectations mainly related to:

- Ensuring there is adequate storage in the apartment
- Ensuring adequate provision is made for car parking
- Ensuring there is a laundry included within the apartment

SUMMARY – BUYING OFF THE PLAN AND CUSTOMISATION:

There are no major barriers to purchasing off the plan with the benefit of stamp duty concessions being highlighted. A display home will be well regarded as a tangible example of what can be expected in a new home. Body corporate fees need to be addressed as this issue will concern people who have not previously had experience with living in a community titled building. Expectations around customisation were largely realistic with the ability to choose fixtures and fittings satisfying most participants' expectations. Access to NBN is very important along with adequate car parking, storage options and a laundry.

3.12 Sales Process including Technology

The following comments were made in relation to the sales process and associated technology:

- The internet is a useful tool for researching properties. You can find the sales' history and see what's on the market. You now have easy access to information including tools like Google Earth
- If you are buying off the plan you can see where the property will be built
- You might use technology but you want to see the property before you purchase
- Virtual tours would be useful

Other information sources suggested were Saturday's Advertiser, word of mouth and talking to real estate agents and neighbours.

APPENDIX 1: MARKET SEGMENTS

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

Volume 1 in this suite of reports provides a comprehensive summary of the segmentation process.

Six segments were identified overall for Adelaide city living with two identified as primary and tertiary markets, the 'Cosmopolitans' and 'Urbanites' respectively.

The market depth for the Adelaide metropolitan market is as follows:

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

Below are descriptions of each of the segments identified.

Cosmopolitans – 24%

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

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

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

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

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

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

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

The Cosmopolitans are less likely to:

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

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

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

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

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

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

Homebodies – 23%

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

The vast majority of Homebodies:

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

The Homebodies are less inclined to:

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

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

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

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

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

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

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

Traditionalists – 14%

The Traditionalists represent 14% of the population and this is the fourth largest of the six segments. The Traditionalists are so named because of the six segments, this group has a high percentage of people who would prefer to live on a large traditional block of land (89% compared to 68% of the total sample) and a similarly high percentage of people who would prefer to live in a traditional style of home (88% compared to 69% of the total sample.

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

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

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

The vast majority of Traditionalists:

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

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

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

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

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

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

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

Urbanites – 9%

The Urbanites represent 9% of the population and along with the Diffidents (also 9%) is one of the two smallest segments. The Urbanites are so named because the vast majority of the members of this segment are attracted to the idea of city or near-city living (80% compared to 45% of the total sample) or in higher density developments such as apartments (58% compared to 21% of the total sample) and terrace/townhouse (55% compared to 27% of the total sample).

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

The Urbanites segment has a decidedly green tinge with a preference for homes that are energy efficient (89% compared to 66% of the total sample) and developments that include the latest in environmental initiatives (89% compared to 63% of the total sample). The Urbanites are also prepared to pay a premium for an upmarket brand they can trust (84% compared to 54% of the total sample) and see themselves as trendsetters (53% compared to 16% of the total sample). This is by far the trendiest of the six segments.

The vast majority of Urbanites:

- Think it's important that standards are set and enforced for new housing developments (96%)
- Have a clear idea of their goals in life (92%)
- Consider themselves to be confident (90%)
- Claim that keeping in close contact with their families is important to them (93%)
- Consider that peace and quiet is an important consideration when choosing somewhere to live (91%)
- Consider themselves to be well-educated (92%)
- Consider that safety and security is an important consideration when choosing somewhere to live (95%)

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

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

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

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

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

Suburbanites – 21%

The Suburbanites represent 21% of the population and this is the third largest of the six segments. The Suburbanites are so named because of the six segments, this group has a high percentage of people who might be described as having 'suburban' attitudes. They have an appetite for a traditional home on a large traditional block of land and they are adventurous, outgoing, confident and competitive.

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

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

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

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

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

The Suburbanites are also less inclined to:

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

Not surprisingly the Suburbanites are less inclined to prefer to:

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

The vast majority of Suburbanites:

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

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

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

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

In summary the Suburbanites, as their segment name suggests, are typified by their suburban attitudes. They are adventurous, outgoing, confident and competitive with minimal interest in sustainability.

The Suburbanites rank as a leadership segment but this is not a priority segment as they have little interest in city living. Rather this segment is the province and the dream of the suburban greenfield development marketer and is therefore ranked as a tertiary market segment.

Diffidents – 9%

Along with the Urbanites, the Diffidents represent just 9% of the population and this is the equal smallest of the six segments. The Diffidents are so named because of the six segments, this group has by far the highest percentage of people who have minimal interest in community, a low level of interest in keeping in close contact with their family, a low level of confidence and are generally neither adventurous nor outgoing.

On a positive note, the Diffidents are attracted to terrace and townhouse living (37% compared to 27% of the total sample) and somewhat attracted to apartment living (25% compared to 21% of the total sample) while 45% find the idea of living in or near the city appealing (similar to 45% of the total sample).

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

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

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

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

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