

RESIDENTIAL DENSITY (LIVEABLE COMMUNITIES)

Market Perceptions

FINAL REPORT, 5 AUGUST 2011

Undertaken on behalf of Fred Hansen, the Adelaide Thinkers in Residence program, Land Management Corporation and a range of other government stakeholders.

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Section 1: Methodology

- Over the next 30 years plans are in place for: steady population growth of 560,000 people, the construction of 258,000 additional homes, economic growth of \$127.7 billion and the creation of 282,000 additional jobs. The 30 Year Greater Adelaide Plan will locate the majority of new housing in current urban lands, infill centred particularly around transport corridors.
- Transit-oriented developments (TOD's) are neighbourhoods offering a mix of high-density, high-quality housing located with employment, mass transit connections, services and recreational activities. A TOD can include a mix of residential, retail, commercial and civic uses around key public transport interchanges such as train, light rail, O-Bahn stations and bus/train interchanges.
- This study seeks to determine building forms that would be attractive to the community (and which segments); constraints to higher density choice; motivations towards / against higher density living; and identify those gaps between perception and experience of higher density living.
- The objectives, therefore, were to, firstly, undertake a review of existing research reports and findings to establish an understanding of the perceptions, motivations, knowledge and preferences of housing decision makers and the influences upon them and, secondly, use this knowledge to develop a research instrument to undertake primary research into the Adelaide housing market to establish an accurate understanding of the perceptions, motivations, knowledge and preferences of housing decision makers and the influences upon them. In particular:
 - ~ identify the community's understanding of what higher density development is versus the technical definition.
 - ~ identify key perceptions regarding higher and lower density dwelling formats (experience vs perception). *For example: personal autonomy; crowding; privacy; noise; structural safety; image; crime and safety; community within the 'complex' (demographics, transience etc); choice (built design) etc.*
 - ~ identify the key 'liveability' characteristics / quality of life indicators that housing buyers desire / avoid – including local environment characteristics (design characteristics). *For example: size of residence; size of 'complex'; affordability (including 1st home buyers); parking and congestion; location; costs of living; maintenance; privacy; private open space; views; amenity and design; flexibility (pets, children); future plans (eg children / retirement) etc. Also including locality issues, such as access to goods and services, public transport provision; proximity to CBD; proximity to place of work; community characteristics; public realm characteristics; public open space; landscaping; noise etc.*
 - ~ identify key drivers / motivations in purchase of higher (or lower) density dwellings. *For example: (cultural norms, traditions); developer driven marketing; family background; 1st home buyers grants; choice and availability; affordability etc.*
 - ~ identify existing and potential population segments that prefer / avoid higher density dwellings (*demographic patterns and lifecycle stages as reflected in above outcomes*).
- There are three components to the primary research, a CATI survey, an Online survey using a panel and four group discussions. The following report incorporates the findings of all three phases, including an executive summary of the overall project.

Overview of Qualitative Phase

- As the final phase of the LMC, TIR and other stakeholders' Liveable Communities Project, four group discussions were conducted, two each on Tuesday 14th and Wednesday 15th June 2011.
- Focus groups are an ideal forum as they are non-threatening, with similar people and a relaxed way to participate in shaping the way Adelaide will address housing needs into the future. The insights provide a greater understanding of the attitudes towards higher density development and the underlying rational and emotive motivations supporting those attitudes.
- Metropolitan Adelaide residents were randomly selected, using the Electronic White Pages, to recruit the group participants. Each of the four groups contained a gender balance, were all housing decision makers, represented a mix of purchasers and renters (although in some groups there were few renters) and a mix of socio-economic status (based on selecting people from suburbs determined as high, medium and low socio-economic advantage using the ABS SEIFA).
- They were grouped into 4 age cohorts, on the basis that these would approximate life-stages and therefore have an impact on housing decisions. These were as follows:
 - Under 30 year olds
 - 30 to under 45 year olds
 - 45 to under 55 year olds
 - 55 to 69 year olds
- The groups were moderated by Dr Gokhan Ayturk (under 45 year olds) and Helen Fischer (45 to 69 year olds), both of whom are highly experienced in facilitating group discussions and analysing qualitative data.
- The moderator's guide was developed by Helen Fischer, in consultation with the stakeholders to ensure that the topics covered adequately addressed the issues from each stakeholder's perspective. Having said this, limitations were placed on the volume of questions and range of topics which were raised so as not to change the methodology into a "Q and A" exercise and lose the depth of insight this method provides.
- Photographs of various examples of liveable communities were also utilised during the discussions, to provide participants with visual cues to discuss in a more informed way rather than relying on their pre-conceived ideas of high density living.
- Participants were given an honorarium of \$50 each to compensate them for any cost incurred in travelling to Kent Town to attend the groups.

Executive Summary

PERCEPTIONS OF HIGHER DENSITY

- **OBJECTIVE:** Identify the community's understanding of what higher density development is versus the technical definition.

- The research has highlighted that Adelaide's traditional low density and low rise urban character is strongly held by residents as the ideal of the "Australian dream". Higher density was perceived as an anathema to many residents, thought of only in the context of transitional housing for the young, as affordable housing for people with low socio-economic status or, in an up-market context, as housing for comparatively wealthy singles or couples without children. The general consensus was that high density would not be a desirable feature in their neighbourhood.
- Some understood sub-division of suburban blocks into two single storey, semi-detached dwellings to be higher density, but they were in the minority. There were mixed feelings about this type of development. On the one hand, some felt that it offered affordable homes on small blocks to first home owners and small families, whilst others perceived it as "filling the block with housing" and having little or no garden or trees and not fitting in with the local character. The latter perception tended to be in the older age segments.
- People in general tended to focus on the built form as the key indicator when talking about higher density. In particular its height and bulk relative to the street and to the block, and also in comparison with the amount of open space surrounding the built form, were key characteristics used to define high density. Other features, such as the number and size of mature trees, expanse of green lawns or gardens and piazzas incorporating green trees added not only to the visual appeal but also provoked a softening of perceptions towards the high density built form within this type of setting.
- This does not mean that the principles behind higher density, such as: location; mobility; connectivity; integration; choice; affordability; and lifestyle, are not perceived as adding value to a neighbourhood. These are desirable attributes which are sought after and which figure in the decision making of home buyers. The attribute which is the "deal breaker", however, is size. This can mean a combination of size of the built form itself, size of specific rooms to ensure fit for purpose, the size of the private, open space and the associated flexibility to grow as families' needs change.
- This factor helps to underpin the strong reaction against children living in higher density, along with fear that children exposed to public space rather than private back yards for play and social networks are less safe and must be accompanied by an adult. Among the few group participants with children who have experienced high rise living overseas, the lived experience was that design consideration must be given to the needs of families and children. High density developments overseas (especially in Singapore and Beijing, both mentioned in the group discussions) included affordable family units, enclosed children's play spaces, common open and indoor amenities, private open space and social support mechanisms such as community services. In local conditions, design attributes such as these would go a long way towards mitigating the strong negative perception that children and medium to high density do not mix.
- Having talked about the barriers to the concept of higher density development, the research also highlighted that a market exists for quality medium density developments which include the physical and social infrastructure to support diversity in the mix of people and family types attracted to living in this type of development. They must be both affordable and durable to encourage a long-term perception that the apartments are a permanent home. This would go some way towards discouraging the view that medium or higher density is transient or low socio-economic housing.

Executive Summary

- **OBJECTIVE:** Identify key perceptions regarding higher and lower density dwelling formats (experience vs perception). For example: personal autonomy; crowding; privacy; noise; structural safety; image; crime and safety; community within the 'complex' (demographics, transience etc); choice (built design) etc.

- The lived experience versus the perceptions of those who have not lived in high density are not in synch. If people have lived in higher density overseas, they tended to be considerably more positive towards the concept than those who have lived in high density in Adelaide or interstate. Indeed, some said that if high rise apartments were available in Adelaide, and were similar to the ones they have lived in overseas, they would be living there instead of a detached house. Key attributes they miss about living in high rise included: the community feel; knowing well those living alongside and looking out for each other; being able to walk outside and "catch the bus and if that bus sails past another will be along in a few minutes"; having open space and plazas for recreation and exercise close by; and a nice, modern apartment which was large enough for a family to live comfortably.
- Among those who did not share this view, crowding and privacy issues were common perceptions of higher density, and were key considerations when making the decision to opt for a home on its own private outdoor space. This space allows children to play in safety and, if old enough, without constant supervision and allows parents to undertake home tasks (e.g. hanging washing on line, working in the garden, reading in the sun etc.) in privacy and without having to talk to neighbours unless they choose to. It is the concept of "quiet possession" and is well entrenched culturally.
- "Noisy" was also a strongly held perception of higher density living. Most experiences of high density living in Adelaide or interstate tended to be transitional (e.g. as students, pre-partnering, post-divorce, work-related posting etc.), whilst many who had experienced higher density overseas held a different perception about noise, privacy etc. because it was considered to be their home and they welcomed the social interaction and looking out for each other as enhancing their lifestyle rather than detracting from it. This segment also said that you could not hear either neighbours or outside traffic noise from inside their apartment.
- Crime and safety issues were also left-over perceptions from the days when high-rise "flats" provided cheap accommodation for people with low socio-economic status. This perception is deeply ingrained and will only change over time and with role model "liveable communities" operating successfully in Adelaide to encourage broader views of urban consolidation in practise.
- In terms of structural safety of higher density, there was a strong feeling that many new homes, including McMansions and also contemporary, semi-detached housing, as well as apartments and some units, were not built as sturdily as older, character homes. There was a tendency to think that this modern housing would not last as long (as older-style and traditional houses) and would devalue the neighbourhood as they deteriorate. Brick was perceived as stronger and more durable than cement block and had more street appeal.

Executive Summary

- **OBJECTIVE:** Identify the key 'liveability' characteristics / quality of life indicators that housing buyers desire / avoid – including local environment characteristics (design characteristics). For example: size of residence; size of 'complex'; affordability (including 1st home buyers); parking and congestion; location; costs of living; maintenance; privacy; private open space; views; amenity and design; flexibility (pets, children); future plans (eg children / retirement) etc. Also including locality issues, such as access to goods and services, public transport provision; proximity to CBD; proximity to place of work; community characteristics; public realm characteristics; public open space; landscaping; noise etc

- Size of residence is a critical factor in decision making about purchasing a house. Flexible size is a key factor also – providing the ability to add on as the family grows or as work-life changes occur (e.g. working from home). Private outdoor space changes from a safe, open play area for young children and pets to fit for purpose rooms such as large sheds, separate office, teenager's retreat, flat for ageing parent, outdoor entertaining area, or larger family room as the family's needs change.
- The key findings with regard to size of medium / high density built form were complex, but primarily most would accept 3 to 5 levels but not higher unless it is in the City or in an area specifically designed for high density (e.g. Eastwood and Gilberton) and definitely not overlooking and dwarfing a suburban area. In the designs they like, 5 to 7 storey buildings around a central open space were perceived as belonging in a City setting not a suburban one. Also L shaped buildings, even with a garden inside the L, tended to remind them of hotels or office buildings rather than homes for a range of people and families.
- Affordability is also an important factor in quality of life and is a major driver of choosing to live further out on the fringes. First home buyers in particular choose a location based on affordability and younger people tended to see this issue as not only becoming more important with increasing house prices, but less affordable compared with previous generations. This segment may be attracted to higher density as an affordable option but many will have aspirations of a traditional home on its own block once they feel they can afford this and as their family changes. This belief of higher density as transitional will be difficult to overcome and will impact on how higher density around transit hubs or corridors develop into sustainable communities.
- On the other hand, affordability of the ongoing living costs in large houses on large blocks and the transit costs of long distances to get to work is only a minor factor in decision making for most younger people and young families. Once they reach mid-forties or so, living costs take on greater importance and older respondents place far more importance on this aspect (financial reasons primarily, then environmental sustainability).
- Reasonable access to "good schools" is a priority for those with young children or intending to have children. Indeed, some said they would move to ensure they were zoned for the public school of their choice. This means that higher density would be more appealing if public transport to schools is easily accessible, particularly for children from mid-Primary upwards when parents feel they can start to relinquish responsibility for transporting children to and from school.

Executive Summary

- **OBJECTIVE: Identify the key 'liveability' characteristics / quality of life etc - Continued**

- Proximity to the CBD is not particularly important to most residents. It is believed that the travel times to the City from much of the inner suburban areas is good. Up to 30 minutes travel to work is acceptable and some accept longer distances to live in the house they want. No more than 15 minutes from all other services and goods is perceived as a good lifestyle. Many said "this is why we live here", meaning in Adelaide. The fear is that additional population will destroy what is special about Adelaide (i.e. a City with acceptable traffic congestion and without the housing affordability and population problems of larger Cities).
- Some prefer most shopping and business/personal services to be within walking distance if possible, although they are still in the minority. This is seen as aspirational to those who currently drive to local shops and services. It is not achievable for many because larger shops have put many "corner delis" out of business and therefore travel by private car has become essential to access most goods and services. Shopping is often combined with travel from work or picking up children from school.
- Public open space is valued for its aesthetic appeal as much as it is valued as useable space for outdoor activities. Indeed, some said they live near a park, can see it from their homes but Tall trees are particularly valued and provide significant "softening" of attitude towards the concept of higher density.

- **OBJECTIVE: Identify existing and potential population segments that prefer / avoid higher density dwellings (demographic patterns and lifecycle stages as reflected in above outcomes)**

- The market segment most likely to consider higher density dwellings still tends to be mainly those not in a traditional family situation (i.e. single and young, students, young couples, single females or males, some older couples, children independent). Some of these perceive it would be an improvement on their traditional detached suburban house lifestyle (e.g. low maintenance, café lifestyle, active social and cultural lifestyle etc)
- Among those in the older couples market, most indicated that this would not suit their lifestyle choices and their preference is to remain in the family home as long as possible. However, it was an appealing concept to some older couples as a downsizing option they would consider.
- Among the market segment identified as younger singles and couples without children, high density living is still perceived as transitional, only until they are able to afford a "house of their own". They tended to be renters of higher density dwellings rather than purchasers. They also indicated they would enjoy the lifestyle benefits of an active, sociable community living environment regardless of where they live.
- Almost exclusively those in the young and middle family life-stage could not conceive of living in this environment. Socially, it would be unacceptable – perceived as transient, low-income, associated with single parents only rather than traditional 2 adults with children families.

Executive Summary

- **OBJECTIVE:** Identify key drivers / motivations in purchase of higher (or lower) density dwellings. For example: (cultural norms, traditions); developer driven marketing; family background; 1st home buyers grants; choice and availability; affordability etc

- The public tend to perceive higher density as concrete blocks which overlook and overshadow surrounding small houses and have no redeeming features like balconies, trees, green open spaces and so on. This type of development is thought to attract people who are “undesirable and anti-social”. It will be difficult to overcome these misconceptions until some examples of this type of development are working in practice and the model is seen to provide a desirable lifestyle which attracts a wide range of socio-demographic profiles
- Proximity to the CBD is not particularly important to most residents. It is believed that the travel times to the City from much of the inner suburban areas is good. Up to 30 minutes travel to work is acceptable and some accept longer distances so that they can live in the house they want. No more than 15 minutes from all other services and goods is perceived as a good lifestyle. Many said “this is why we live here”, meaning in Adelaide. The fear is that additional population will destroy what is special about Adelaide (i.e. a City with acceptable traffic congestion and without the housing affordability and population problems of larger Cities).
- Traditional single storey detached housing is the cultural norm for the majority of the population and clearly identifies Adelaide as a unique, sprawling city with charm and a “family-oriented” lifestyle. “A good place to bring up children” is used often to describe living in Adelaide. The concept of higher density is perceived as going against this ideal. However, there is some understanding that this ideal cannot continue sustainably, without some sacrifices. It is how urban consolidation is undertaken that is the key concern for many.
- At this point in time, the focus of the public is clearly on the perceived difficulty of using regular public transport systems against the ease of using a private car. The majority cannot conceive of living without a private car. Despite most people indicating they live about 15 minutes from the majority of services required by the household, this aspect is not a major consideration in decision making about where to live and some indicated a willingness to travel considerably further to get to work. They tend to make the decision without giving a great deal of thought to the cost of the travel, perceiving it as a cost of living in a detached house on a large block and living the “Australian Dream”.
- Having said this, most also recognised that having integrated walking, cycling, bus and rail transport can provide a far better solution to transport, health, environmental and financial outcomes than the costly private car-dependent lifestyle they have today. Continued implementation of improvements to Adelaide’s public transport network, information dissemination and role models of integrated, condensed developments will gradually change the collective mindset and overcome the entrenched belief that transport by car is the most appropriate form of transport.

Executive Summary

- OBJECTIVE: Identify key drivers / motivations in purchase of higher (or lower) density dwellings - Continued

DESIGN ATTRIBUTES

- Much of the criticism of higher density housing is based in an ideological resistance to change. However, if new development, in particular the built form and the public open space, is perceived as not being a quality development in terms of aspects such as: design being in harmony with its surroundings; quality of construction and building materials; trees that thrive in the location; and so on, then community prejudices against higher density housing will be confirmed.
- A primary consideration in planning for a transit or corridor development, therefore, is to ensure quality in terms of aspects such as:
 - design of the built form to blend and enhance the neighbourhood, rather than stand out or detract from the local character,
 - overlooking and noise mitigation through innovative design,
 - sustainability in terms of both water and energy use and also quality of the materials used in the built form to ensure longevity, and
 - the quality and amount of open public space and enclosed private play areas.
- Building height should blend with the local environment, rather than overlook and overwhelm the neighbourhood, as some residents fear, to ensure the best possible outcome for all stakeholders. There was cautious acceptance of high rise developments (the optimal they thought was up to about 10 levels) in locations such as Bowden and Gilberton, where it was thought this height would not dominate low density neighbours because of the isolation of these areas and the existing character as industrial / commercial. On the other hand, some locations earmarked for higher density development (such as Henley Beach Road) elicited strong negative reactions because of fears that “high rise” developments in traditionally low-density areas will not only spoil their amenity but also devalue properties in the area and will deteriorate over time more quickly than the surrounding houses. Added to this is the perception that an influx of additional residents will add pressure to the existing infrastructure.
- Consideration, therefore, needs to be given to blending each development into the local community so that the built form and open space design is complementary to its surroundings.
- Design features which were most appealing included:
 - No more than 5 levels, except in suitably isolated locations like Gilberton, and preferably only 2 to 3 levels in predominantly low-density areas.
 - Balconies are a feature which they found attractive and added street appeal.
 - Green outdoor spaces, including lawns, relevant trees, streetscapes and gardens with walkways, seating and shade.
 - Brick was perceived as more durable and attractive than concrete and tended to blend into the neighbourhood better.
 - Traditional designs were more appealing to a wider audience than contemporary designs. For example, the ultra-modern medium density houses at Lochiel Park were unappealing to the majority of group participants (including the youngest cohort), even though they liked the concept of sustainability.

Executive Summary

- OBJECTIVE: Identify key drivers / motivations in purchase of higher (or lower) density dwellings - Continued

- Increasing numbers of people are working from home, a factor which is driving a need for formal workspace separate from bedrooms and living areas. Some people indicated they were building on to their house to achieve a separate home office. Consideration will need to be given to making units and apartments flexible in design to allow for spaces to be adapted for non-traditional uses such as workspaces and home offices.

COMMUNITY ENGAGEMENT

- The research revealed clear evidence that the environmental, economic and social benefits attributed to transit oriented and corridor developments have not been effectively promoted to the general public in metropolitan Adelaide. This lack of informed understanding has led not only to public confusion and misunderstanding of higher density development, but has clouded perceptions towards the concept. Hence some of the attitudes demonstrated throughout the research, such as the strong association between high density and high rise, the lack of understanding of the environmental and infrastructure costs of fringe development, the perception that there are no economic or social benefits, only net losses, from higher density, have become relatively prevalent in the community. It is likely that the threat posed by medium density housing will decline of its own accord over time and with accurate information to support the public through the transition.
- Desire by the community to ensure that higher density does not adversely impact on the value of their neighbourhood conflicts with the need to also provide affordable and inclusive housing and both of these conflict with the need to ensure profitability. Considerable cooperation is evident between levels of government and the private sector, but the third element is the community living in and around areas earmarked for development of this type. Local residents should be recognised as stakeholders and included at more than an information dissemination level to ensure they become collaborators and take ownership of the liveable community to achieve the best possible outcomes.
- This means that government and private stakeholders for each transit-oriented or corridor development must actively engage the local residents at a very early stage in the planning. Residents have a significant level of interest in information and many also want active participation in developments, not just a passive role.

Recommendations

In terms of engaging the community on the topic of liveable communities, most participants across all age cohorts showed interest in further information about the topic. While the majority would be satisfied with information available via a website or email updates on the TOD and transport corridor strategy as it develops, some wanted greater involvement than information dissemination.

There are two levels of information and engagement evident through the research:

- ❖ Providing the community with information about the overall concept of TOD's and transport corridors, the rationale and the where's and how's. This will assist residents in understanding how the strategy is likely to effect them and overcome the disinformation and clouding of the issues. There is a lack of informed debate about the big picture, the rationale and much of what was known tended to be emotive opinion rather than factual knowledge and understanding.
- ❖ Participants showed limited knowledge about specific areas of development such as Tonsley, Mt Barker and Woodville but had strongly held views about how higher density in these areas would impact on local residents, on traffic management, on arable land, and on energy and water resources (to name just the key issues). Engagement of residents in each specific area should be undertaken more proactively to not only help create understanding but also to foster a sense of "ownership" as stakeholders with a genuine say in how their neighbourhood develops. A communication and engagement strategy will lead to better decisions and insights and ultimately better communities.

It is therefore recommended that an Engagement Plan be developed to cover an overall social marketing campaign and engagement of local communities on one level. A second level of the Engagement Plan would be to assist in gaining the cooperation and, where appropriate, the active participation of the local residents and business owners who are likely to be impacted by development of a transit or corridor development in their area.

Recommendations

❖ The initial phase of the research project was a search for examples of similar secondary research into public perceptions of TOD's and transport corridor development. This task revealed a scarcity of attitudinal and behaviour research on this topic having been undertaken among the general public, both in Australia and overseas.

❖ The implications are that the current research represents a unique benchmark of community opinions into an increasingly important focus of urban development to create liveable communities. This knowledge of public opinion should be available to, and utilised by, a wide range of State Government departments, local governments and other stakeholders involved in aspects of developing transit oriented developments, in order to advance understanding of the public's perceptions of the TOD strategy.

It is recommended that a presentation of these research findings be should be put together, to be disseminated to various government stakeholders. The audience will be determined by the project group and may include the private sector.

It is further recommended that the project be replicated in approximately 3 years, to track any changes in attitude over time as a result of greater public debate. The follow-up research would also be used to evaluate the effectiveness of social marketing and community engagement programs.

❖ The research has also highlighted that both coordination of communications and cooperation between government and private stakeholders is critical in ensuring that communication messages and community engagement advance a consistent, inclusive and supportive perception of urban consolidation.

It is therefore recommended that community engagement on transit oriented developments should have leadership which would be responsible for coordination of communications, as well as cooperation between government and private stakeholders, to ensure that the social marketing messages are consistent, inclusive and unequivocally simpatico with the concept of urban consolidation.

Section 3: Summary of Key Findings

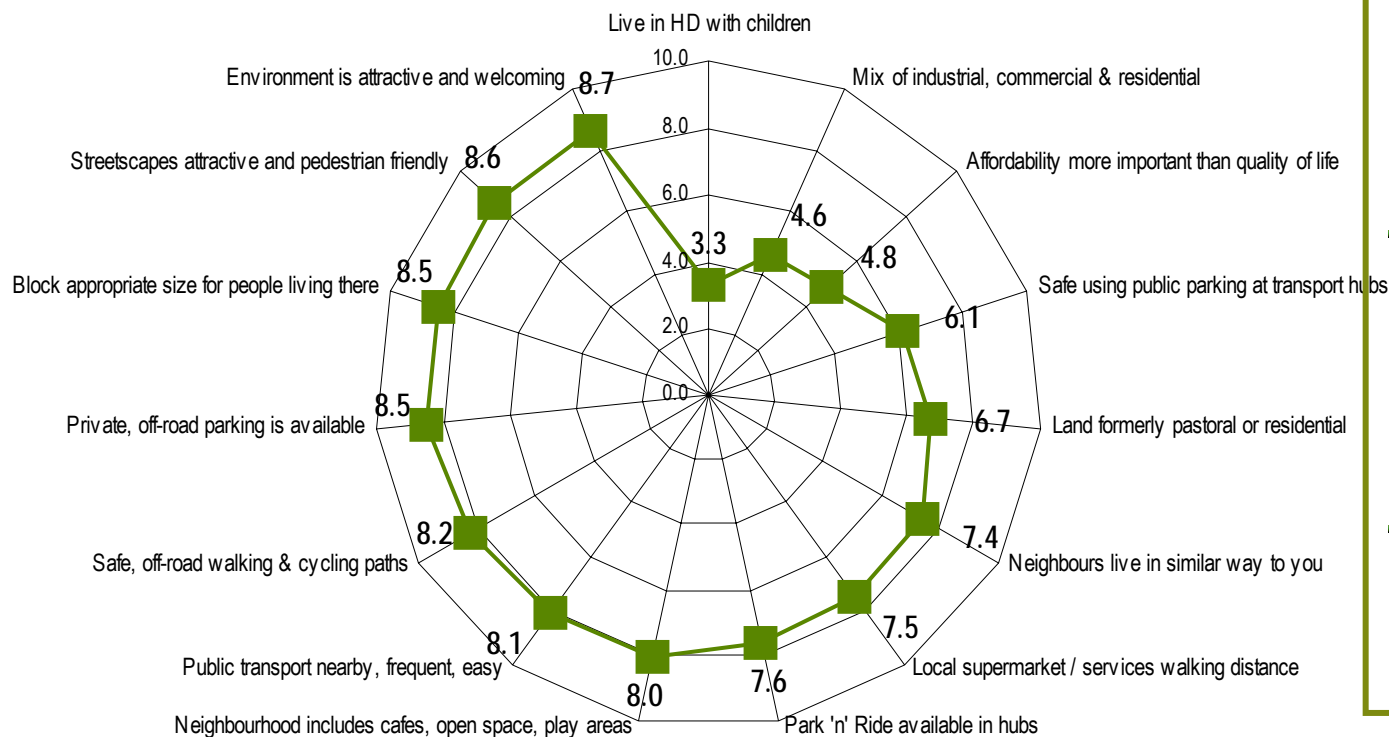
Summary of Findings

- Among those we spoke with by telephone, proximity to a range of services, such as retail outlets, schools and public transport, is the key driver of choice of where to live. This supports the theory of “30 minute living” for a desirable lifestyle.
- Size was a key factor in choice of housing design, including attributes such as: spacious living areas, 3 or more bedrooms, back garden / outdoor area, at least 2 bathrooms, a large block and parking for at least 2 cars.
- Two in five respondents said new housing should be in either TOD’s or Infill in existing suburbs (or a combination). A third nominated Fringe development. Of concern was the finding that private renters, under 35 year olds and young / middle family households, in other words those who are likely to be the primary market for higher density living, were more likely to state that new development should be on the Fringes. This finding is confirmed by the choice modelling outcomes, which showed that a detached house with back garden are key attributes when choosing a place to live.
- “High rise apartments” was the predominant top of mind perception of what higher density living means. Other aspects were: noise, no back garden, limited space and crowding. Most perceptions were negative, with just 5% citing better infrastructure to describe higher density. This, along with a distinct lack of awareness of both the 30 Year Greater Adelaide Plan and the TOD’s strategy (8 out of 10 had little or no knowledge of either), suggests that considerable social marketing should be undertaken to inform Adelaide residents about the potential benefits anticipated from higher density development.
- Better public transport services and affordable housing closer to the City were perceived as the key benefits of TOD’s, although reduced private car use and living within walking distance of shops and services were also perceived as lifestyle improvements which would result from living within TOD’s.
- Overcrowding and the resultant social behaviour and safety concerns were perceived as the key negative impacts of TOD’s.
- Attitudes towards higher density and TOD’s revealed a pattern which highlighted good public transport systems for managing traffic, whilst simultaneously revealing belief that homes must include private open space (i.e. a back garden) and that higher density equates to small homes suitable only for singles or couples without children. Whilst 3 in every 4 respondents agreed that higher density offers affordability without being too far away, 7 out of 10 said it is preferable to live on the fringe, in a detached house with a garden. In addition, 1 in 3 disagreed that fringe development is environmentally unsound. These findings suggest that there is considerable misinformation among Adelaide residents, about sustainability and future urban development, which could be addressed through social marketing. This is reinforced by the fact that 8 out of 10 respondents said they would like more information, or even active engagement, in reference to TOD’s and higher density.
- Positively, when comparing their current lifestyle with a TOD lifestyle, the greatest impact on lifestyle was thought to be the health benefits, in the form of more exercise (walk or cycle more often) and reduced private car use.

Summary of Findings

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Housing Decision Making and Choices

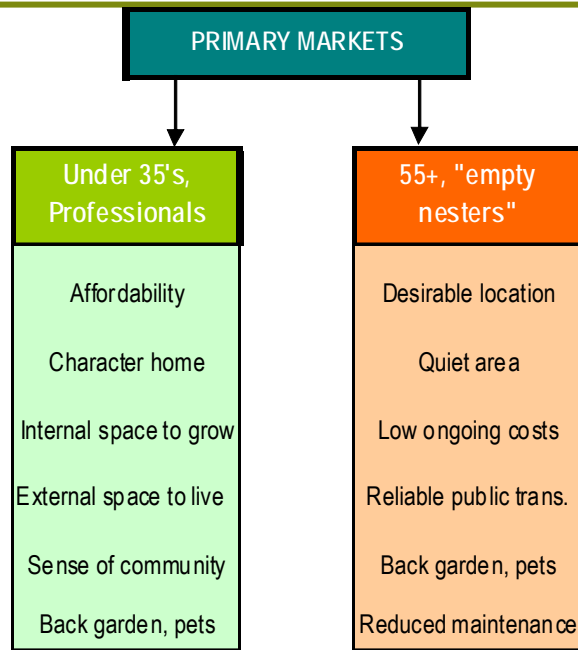


- Decision making and housing choices were tested through a series of statements to which respondents either indicated the importance or their level of agreement, using a 0 to 10 scale.
- Aesthetic aspects, such as an attractive environment and pedestrian friendly, attractive streetscape were ranked highest in terms of importance (8.7 and 8.6 mean scores respectively).
- Least likely to gain agreement was the statement about living in higher density with children (3.3 mean score)

- Among those who participated in the Online survey, almost 1 in 3 were thinking of purchasing a home in the next 10 years. Among under 35 year olds, this increased to more than 2 in 5.
- The predominant perception of what higher density living means coincided with the description given by phone survey respondents, that is high rise, crowding and small blocks / no back gardens.
- Closer to shops and services, less urban sprawl, less garden maintenance and affordable housing were the perceived advantages of higher density, increasing significantly in mentions among those with previous experience of higher density living. The research revealed that prior knowledge of higher density is a key factor in having a positive perception of the community benefits to be accrued from this type of development.

Summary of Findings

- Online respondents focused on concerns about overcrowding, noise and privacy and not having a back garden (particularly for pets) as the key disadvantages of higher density living, but were considerably less likely to raise the issue of social behaviour and safety compared with the (generally older) respondents in the telephone survey.
- The assumed primary market for higher density living, that is: under 35 year olds, young couples with no children and a moderately high household income (as defined in the online survey and similar to the CATI profile), showed a relatively high incidence of raising the issue of not enough space / housing too small as a disadvantage. This finding is supported by the choice modelling, which highlighted size of home as the key driver of housing decisions, and provides insight into the features the primary market will require from higher density – spaces large enough for future family growth and offering privacy and a sense of neighbours not being too close.



- The diagram above demonstrates that the two primary markets for higher density living have very different needs in terms of their priorities in selecting both a location and a home.

- The testing of external designs of higher density, using a range of photographs depicting various higher density housing options, revealed that between 1 in 3 and 2 in 5 people would not live in any form of higher density housing.
- The most popular designs had a number of attributes in common:
 - None were higher than 2 or 3 storeys
 - All had a private balcony
 - Most did not have a front garden
 - All were contemporary designs
 - None combined a mix of light industrial, commercial and residential
 - Only one contained communal social space
- A similar exercise was undertaken showing pictures of a lifestyle view incorporating streetscapes and pedestrian-friendly walkways. Again there were some common attributes:
 - Those with tree-lined walkways or lakeside paths were most popular
 - The top two lifestyles contained communal social space
 - A mix of small retail business and residential is generally acceptable / desirable
 - The profile of those who were most likely to perceive this lifestyle as suitable to them were: under 35 years, contemplating purchase in future, high annual household income and currently or previously have lived in higher density housing.

Summary of Findings

- The findings revealed that higher density is generally perceived as an affordable option and many of those contemplating this type of accommodation in the future were price sensitive (overall, 8 out of 10 nominated a purchase price below \$400,000 and more than 9 out of 10 nominated weekly rental below \$400).
- The exception was those aged 55 to 64 years, 1 in 4 of whom nominated a purchase price of \$400,000 or more and 1 in 10 cited a rental price of \$400 per week or more.
- The research revealed considerable interest in ongoing information about higher density development and TOD's (64% would like to be kept informed overall).

Choice Modelling

- The results clearly suggest that, when respondents were asked to imagine they were in the market to buy or rent a house, the relative importance of the following two attributes outweighed all others:
 - number and size of rooms (27%) – 3 to 4 bedrooms was more strongly popular within this attribute
 - building form (25%) - single storey detached houses dominated
- The results present significantly lower relative importance figures for other factors. The two key factors were followed by:
 - open space (14%) – enclosed back and front gardens being most popular
 - proximity to work and services including schools and shops (12%) – up to 30 minutes is the key factor for optimal lifestyle
 - proximity to public transport (11%) – having several options for travel, including public transport, own car and off-road cycle paths was most desirable.
 - proximity to the City (7%) – inner suburbs and a moderate distance to the City were similarly important and other attributes clearly outweigh proximity to the City.
 - views (3%) – there was little variation between good views from balcony, a streetscape and local playground, and limited views, indicating that views has limited importance in housing decisions.
- Segmentation of the choice modelling results clearly depicted two key results:
 - the two most important factors, size/number of rooms and building form, were subject to significant fluctuations as people age.
 - The choices of the 35-44 and 45-54 age segment presented indicative differences, possibly due to their lifestyles and different needs.
- The 19% relative importance figure given to size/number of rooms by 18 to 24 year olds presented significant increases in 25-34 and 35-44 age segments. This evidently suggests that attraction to a house, based on size, is strongly affected by the peak family life-stage, when people establish families and have/raise children.
- Further, 35-44 and 45-54 age segments gave low importance to the proximity to public transport, as they become increasingly more car-dependent during the peak family life-stages.
- Building form was given a relatively low level of importance by 18-24 year olds, but the proportion steadily increased as people age. This suggests that the high preference for single detached housing is most apparent among older segments and living in high storey buildings is significantly higher among younger segments.

Summary of Findings – Group discussions

- The group discussions were well attended, lively due to participants' engagement with the topic and generated considerable interest in the concept of liveable communities. Whilst some participants had pre-conceived ideas about higher density, these views did not dominate the discussions. Indeed, in general, higher density is still something of an unknown. The following provides an overview of the general findings across all groups.
- Among group participants in general, regardless of their age cohort, proximity to services such as retail outlets, schools, social networks and work, is a key driver of choice of where to live, with size of house and/or size of block being secondary but still important considerations. This supports the quantitative findings and also reflects the theory of "30 minute living" for a desirable lifestyle. Indeed, some said 30 minutes is too long for Adelaide and felt that "15 minute living" provides the optimum lifestyle.
- Size was a key factor in choice of housing design, including attributes such as: spacious living areas, 3 or more bedrooms, back garden / outdoor area, at least 2 bathrooms, a large block and parking for at least 2 cars. These attributes are not just aspirational. Younger participants in particular, indicated a willingness to sacrifice proximity to the City, and the infrastructure and social amenity this implies, in order to achieve an affordable, large house on a 'large' block with space for children, pets and entertaining. They were reluctant to forgo this "Australian dream" and were willing to move further out on the fringes to achieve it. Whilst this appears to conflict with the 30 minute living goal, there was an expectation that most services would be provided within 15 minutes of home no matter where they live in metropolitan Adelaide.
- Common attitudes towards the public transport systems in Adelaide were also noted across age cohorts and life-stages. Adelaide was regarded as somewhat "backward" in terms of transport systems. The general consensus was that public transport is often not regular enough to be reliable for regular transit, there is too much reliance on road traffic and better use should be made of light rail systems. They also expressed a general reluctance to trust that transit systems would be in place as part of the infrastructure of new developments. A relatively common perception was that increasing density would create traffic congestion which may stimulate demand for public transport and only then would new transit systems be put in place in response to demand.
- Closer to shops and services, less urban sprawl, less garden maintenance and affordable housing were the perceived advantages of higher density, confirming the findings in other phases of the research and also secondary sources of information. However, these attributes were raised spontaneously by only a moderately small number of participants across all four groups (between 1 and 3 participants in each group). These participants tended to fit the profile of "alternate households", that is people who do not fit the "family" social norm. They included, but were not limited to, young or mature females living alone and intending to continue this lifestyle, professional couples who have no intention of raising a family and "empty nest" couples who are considering downsizing and choosing lifestyle over property size.
- Following on from this point, in general higher density or liveable communities is perceived by the majority as *"a necessary evil, but it's not for me"*. It is perceived primarily as transitional housing, accommodation for migrants, young people living away from home or older people with no children at home. This clearly suggests that higher density housing is strongly associated with affordability. Some participants went further, suggesting that only low socio-economic status people would accept this lifestyle as long-term accommodation.

Summary of Findings – Group discussions

- It is also strongly associated with the concept of affordable housing. This is despite the examples of higher density already in Adelaide, such as the high rise at Glenelg or on the southern parklands, and also despite the examples of higher density shown to them during the discussions, all of which did not fall into the category of affordable housing.
- The issue of future affordability of housing was clearly understood and one which concerns most participants. However, they tended to become more lenient towards the concept of living in smaller houses, apartments and units when considering affordability issues, although this still tended to be viewed as a temporary solution until they were able to afford *“something bigger”* with its own outdoor, private space.
- Most were not keen on the concept of living in a mix of light industrial, commercial and residential. It was perceived to be noisy, dirty and would reduce property values and impact on the social environment of a neighbourhood. This was a firmly entrenched belief which will not be easily addressed but is likely to decline of its own accord over time and as mixed use developments become more common.
- A key factor in perceptions of medium density housing is the **quality of the built form**. Even more important than the design and materials used, the quality of finish in the built form lends value and equates to perceptions that the built form has *“quality of life”* (longevity). It is less likely, they felt, to degenerate into a slum. Property values surrounding the development may be enhanced by quality in the built form and were thought to be less likely to decline as a result of medium or higher density development.
- On the other hand, one of the common concerns raised was the sustainability of new medium density housing currently being built, in terms of quality and therefore its perceived durability. There was a belief that the housing *“would not last 30 years”* and a perception that as a result the higher density developments on small blocks might become “the slums of the future”. Further emphasising the importance of construction quality, terms such as *“matchbox housing”* were used.
- There was also considerable discussion, particularly among the older age cohorts, about the perceived tension between providing adequate, affordable housing and social infrastructure within an environment of private development and the imperative to create profit. This related in particular to aspects such as the provision of open space, the quality of built form, maintaining or enhancing the existing character of an area and provision of adequate supplies of affordable housing.
- In terms of branding the concept of higher density development, the term **higher density** is perceived as *“high rise”* which conjures images of low socio-economic, crime-riddled estates which are likely to degenerate into “slums”. This perception was also noted in the quantitative surveys and it is relatively commonplace to hear medium density development referred to as the “slums of the future” (Dupois and Dixon, 2002, p 423).

Summary of Findings – Group discussions

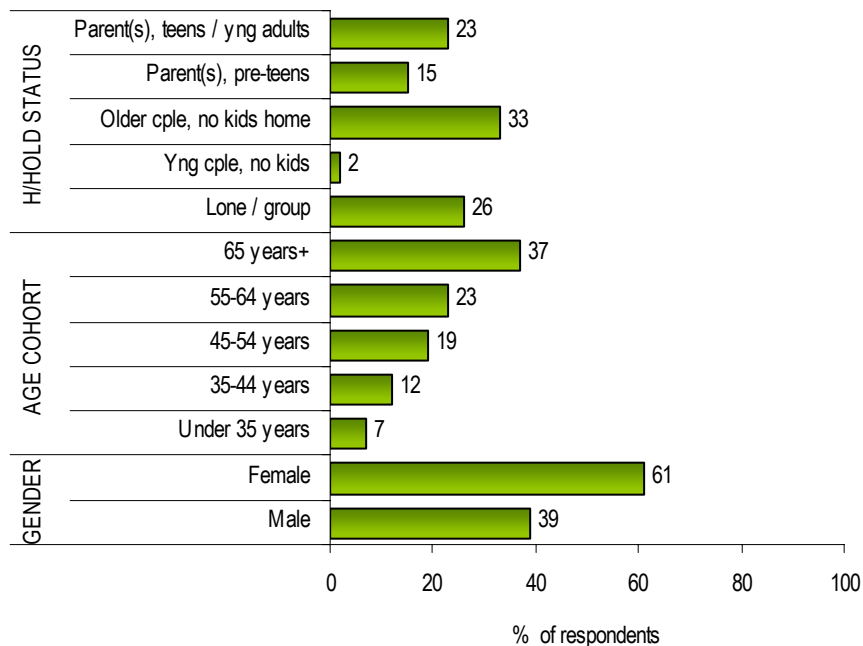
- On the other hand, the term liveable communities was also not particularly well received, perceiving it to relate to *“hippy communes”* and *“government double speak which doesn’t mean much”*.
- Instead, their preference tended more towards the term medium density, which they said does not cause the negative connotation associated with higher density and was *“more real”* than the term liveable communities. These attitudes point to a need for further work to be done in uncovering what concepts such as “liveability” and “quality of life” really mean to Adelaide residents in practical terms. What is evident from the research is that no single concept of liveability will resolve the conflict between desirable lifestyle aspirations and the significant challenges in shaping our future within an environment of change.
- High density developments overseas (especially in Singapore and Beijing, both mentioned in the group discussions) included affordable family-sized units, enclosed children’s play spaces, common open and indoor amenities, private open space and social support mechanisms such as community services (Whitzman, 2009, p 3).
- The research revealed clear evidence that the environmental, economic and social benefits attributed to transit oriented and corridor developments have not been effectively promoted to the general public in metropolitan Adelaide. This lack of informed understanding has led not only to public confusion and misunderstanding of higher density development, but has clouded perceptions towards the concept. Hence some of the attitudes demonstrated in the group discussions, such as the strong association between high density and high rise, the lack of understanding of the environmental cost of fringe development, the perception that there are no economic or social benefits only net losses from higher density, have become relatively prevalent in the community. As Fred Hansen commented *“the focus should be on getting people involved in the vision and feeling that we’re all part of a bigger, forward-thinking pictureIt’s about building vibrant communities.”* (in DPLG, 2010, p 28).
- This view is supported by research undertaken in Auckland, following urban intensification in this City. Council staff reported that some aspects could have been improved, including: more control of design details, provisions for lower housing densities, less uniformity and standardisation, earlier communication with neighbours and a clear-cut distinction between public and private space (Dupuis, 2002, p 421).
- There is clearly a need to continue the engagement of Adelaide residents in the challenges ahead. Participants acknowledged some of the issues confronting urban development, particularly those around transport congestion, demographic change, housing affordability, sustainability, climate change, and the cost of infrastructure. On the other hand some were not ready to accept that population growth is a reality which Adelaide should embrace and plan for as part of future economic growth.

Section 3: Telephone Survey

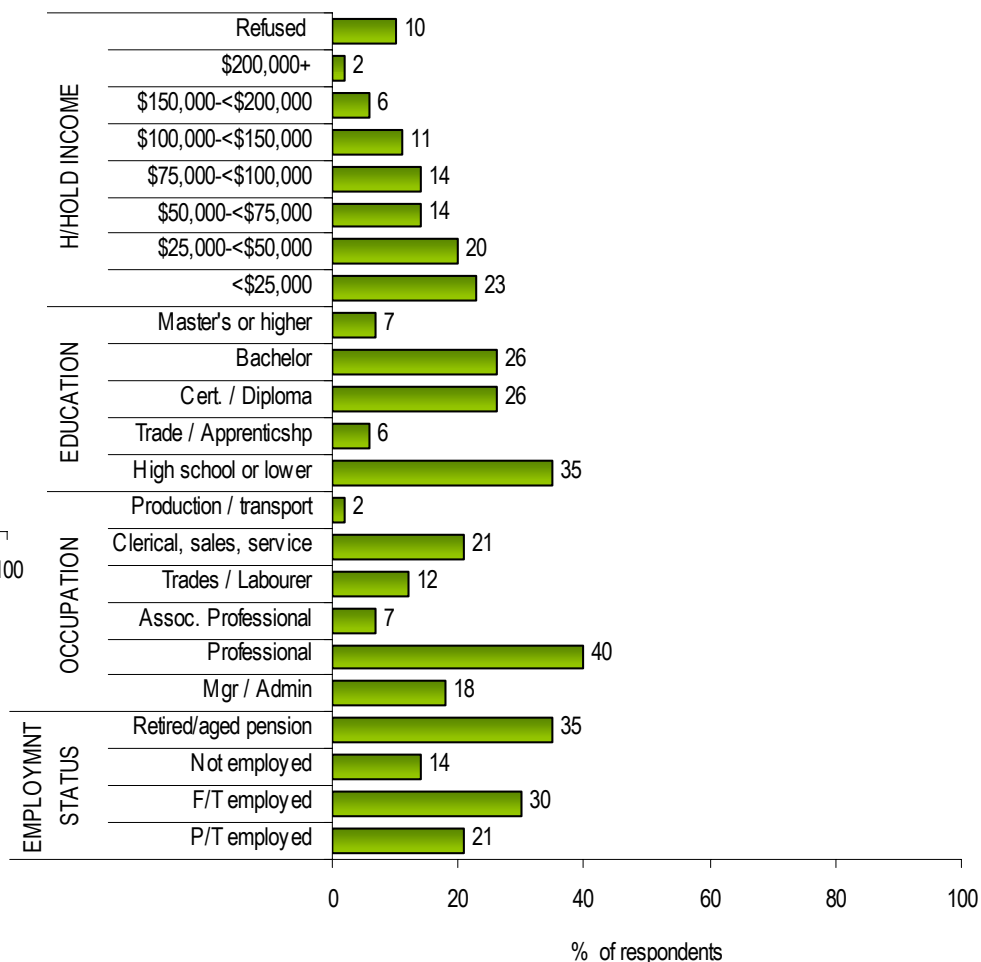
- The survey instrument was developed over time, with input from all stakeholders to ensure that information needs across a range of interests were met.
- The sample (n=600) was generated randomly across the greater metropolitan Adelaide area (postcodes 5000 to 5174 to coincide with SA Health population studies' description of greater metropolitan Adelaide). The most recent (2009) Electronic White Pages (EWP) was used to generate the database.
- Householders who make decisions about where they will live, regardless of whether they are renting, living at home, purchasing or owner occupiers, were the target group. This tended to skew the sample towards those who were at least 25 years and older, as 18 to 24 year olds were either still at home and have no influence over where they live or they had left home but were not contactable on a landline and therefore could not be included in the sample. Population weightings were not applied to the data.
- Reliability of the sample was $\pm 3.99\%$ margin for error at the 95% confidence level (at the total sample level), meaning that the overall findings have a high level of validity. Sub-group analysis varies, depending on the sub-group sample sizes. For example, if differences in response by gender was noted, females represented 57% (n=339) of the total sample while males represented 44% (n=261). The margin for error would be $\pm 5.65\%$ at 95% CL for female responses and $\pm 6.05\%$ at 95% CL for male responses. Whilst both of these are acceptable margins for error, it should be borne in mind throughout the report that sub-group analysis is less reliable by its nature.
- Having said this, sub-group analysis is only reported when there is a statistically significant variation. Sub-groups must be represented by at least 30 respondents for statistical significance to be valid. Variations in proportions are not a reliable indicator of statistical significance. Refer to Appendix D for an explanation of statistical significance and margin for error.

Profile of CATI respondents

SOCIO-DEMOGRAPHIC PROFILE



SOCIO-ECONOMIC PROFILE



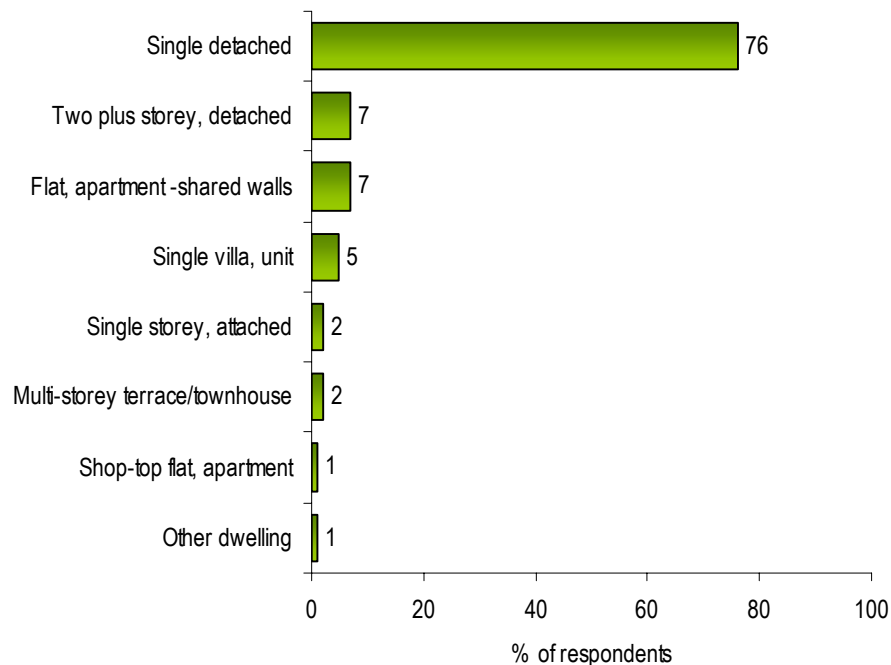
- The sample was skewed towards females (61%), a regular occurrence in CATI surveys due in part to females being more likely to answer the telephone and also more likely to agree to participate in surveys.
- Nearly 2 out of 3 (62%) were living in households with no children.
- More than half (57%) of respondents reported an annual gross household income of less than \$75,000.
- Just over half (51%) were employed, with professional and clerical, sales or service occupations being the most common.

Key findings: Housing Profile

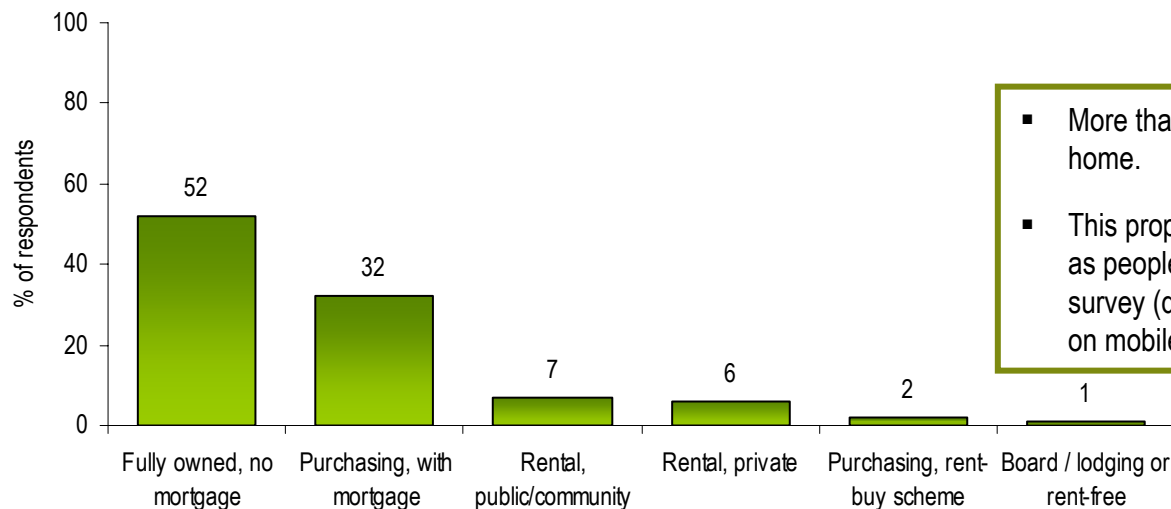
Q1&2 Type and status of housing currently

- As expected, a single storey detached house is the most common (76%) form of dwelling. A further 7% live in a 2+ storey detached dwelling.
- However, the sample also included 7% who shared walls in a flat or apartment, a further 2% who live in a multi-storey terrace / townhouse and 1% who live in a shop-top apartment / flat.

CURRENT DWELLING TYPE (n=601)



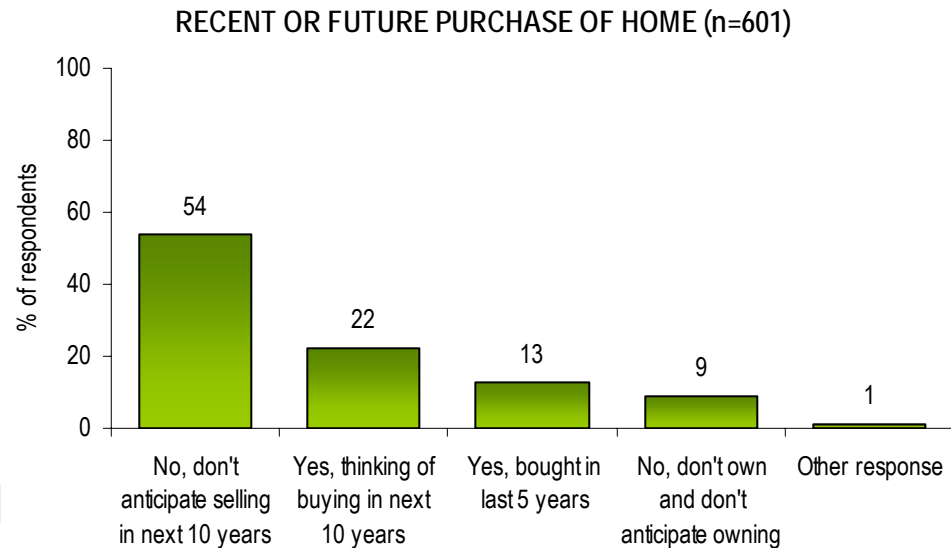
HOUSING STATUS (n=601)



- More than 8 out of 10 either fully own or are purchasing their home.
- This proportion is marginally higher than the general population, as people renting are less likely to be captured in a CATI phone survey (due to lower incidence of having a land-line and reliance on mobile phones which are not in the EWP).

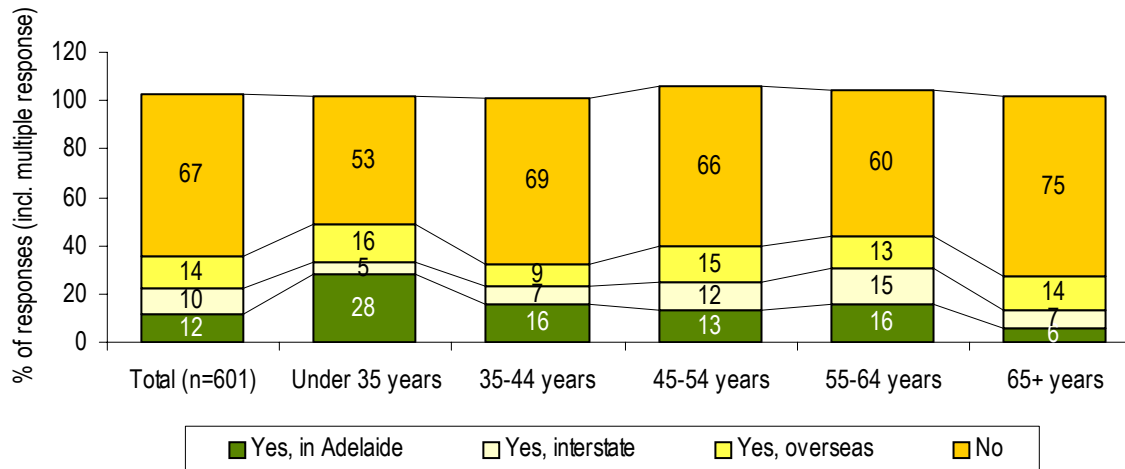
Q3 Recent or future purchase intentions

- Just over half of those surveyed have lived longer than 5 years in their current home and have no intention of selling in the next 10 years.
- However, 1 in 5 (22%) are considering purchase of a home within the next 10 years.
- Showing slightly higher incidences of stating they are considering home purchase in the future were: those currently in private rental (44%), 35 to 44 year olds (36%), under 35 year olds (37%) and those aged 55 to 64 years (29%).



Q7 Higher density living experience

EXPERIENCE WITH HIGHER DENSITY LIVING (n=601)



- A third of those surveyed have experienced higher density living, either in Adelaide, interstate or overseas. 4% had experienced higher density in more than one of these.
- Under 35 year olds showed the highest proportion to have experienced higher density living in Adelaide, although this was not statistically significant compared with other age cohorts.

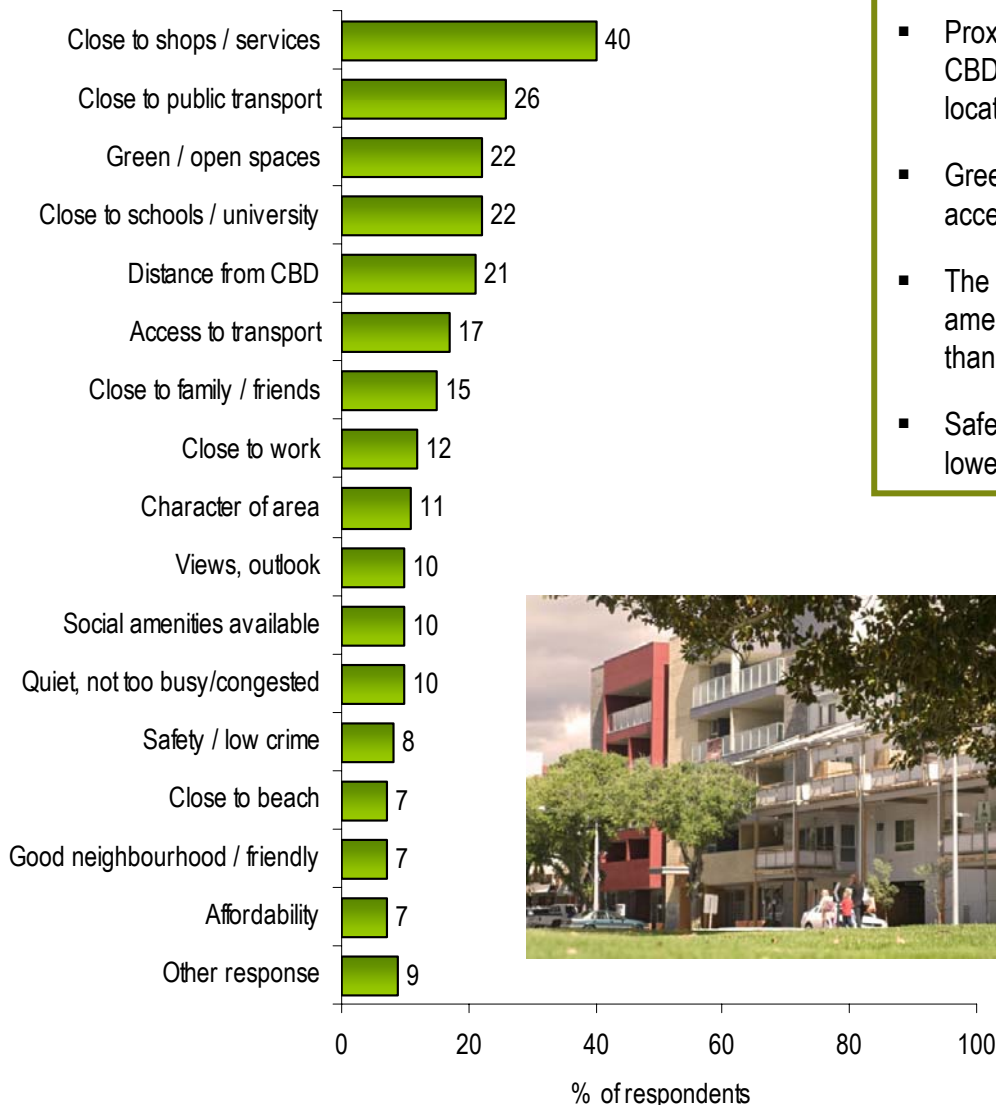
Key findings: Features / Attributes of Location

Q4 Important attributes about where to live

30

IMPORTANT FEATURES / ATTRIBUTES OF HOUSING LOCATION (BASE: Recently bought or intend to purchase home, n=214)

MAIN RESPONSES 5%+



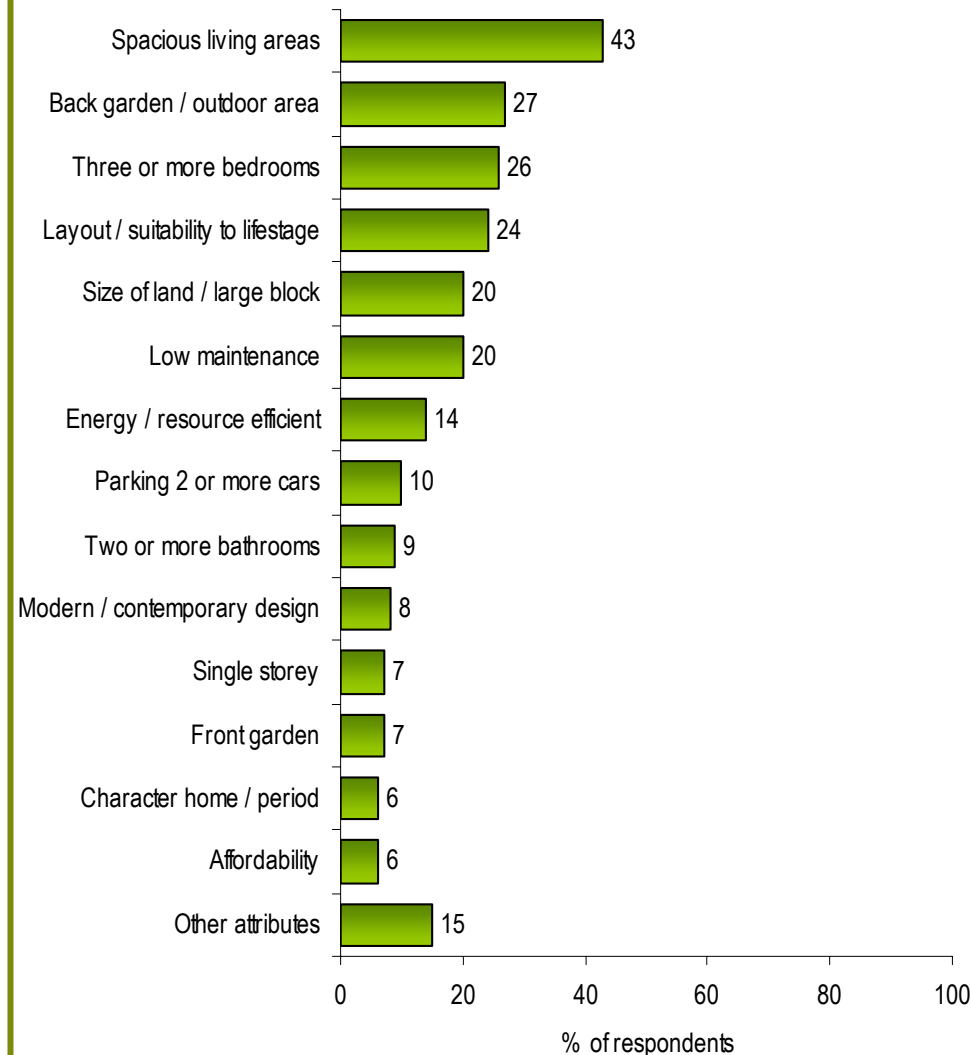
- Those who have either bought a home in the last 5 years or intend to purchase a home in the next 10 years (n=214), were asked two questions relating to important features / attributes of the location and the house itself.
- Proximity to a range of services (e.g. shops, public transport, schools, the CBD etc) is perceived to be the most important attribute when choosing a location.
- Green open spaces is cited as more important in choice of location than access to transport, closeness to family and friends and proximity to work.
- The character of the area, views and surroundings, quiet enjoyment and social amenities are all on a par in terms of their importance but are a lower priority than proximity to services.
- Safety, a good neighbourhood and affordability were positioned considerably lower in importance in driving choice.

- Specific attributes were more important depending on life-stage of respondents:
 - Affordability was highlighted by higher proportions of 35 to 44 year olds and those with a mortgage currently (13% and 10% respectively). This group also rated being close to schools / university as more important than other sub-groups.
 - Close to work was a higher priority for 45 to 54 year olds (26%).
 - Close to shops / services was more likely to be mentioned by those 65 years and older (56%).

Q5 Features or Attributes of Home

- Size was a key factor in design choices, including spacious living areas, with a back garden / outdoor area, at least 3 bedrooms and 2 or more bathrooms.
- The layout of the home, having a large block and being low maintenance (perhaps somewhat contradictory) were also prominent features sought by 1 in 5 respondents when choosing or designing a home.
- Energy and resource efficiency is a priority for 1 in 7 respondents. A further tenth nominated parking for at least 2 cars.
- Affordability was a relatively low priority, as was the character / period architecture, the availability of a front garden and being single storey.
- Interestingly, modern contemporary design was only marginally more popular than character or period architecture.
- Having spacious living areas was important to all age cohorts, not just those in the peak family life-stages.
- Layout / suitability to life-stage and being low maintenance were both considerably more important to respondents 65 years and older than to any other age cohort (37% for each, versus 24% and 20% for all respondents).
- Having at least 3 bedrooms was, understandably, more important among those in the early / middle family life-stages (41% of 35 to 44 year olds mentioned this aspect as important to them).
- Of interest was a difference in attitude towards the size of the home / block and energy efficiency when comparing those who have bought in the last 5 years and those intending to purchase in the future. Among purchasers, a slightly higher proportion said spacious living areas (54% vs 37%) and size of land (28% vs 16%) was important compared with intenders. Intenders, however, were more likely to cite energy / resource efficiency compared with purchasers (19% vs 6%).

IMPORTANT FEATURES / ATTRIBUTES OF HOME DESIGN
(BASE: Recently bought or intend to purchase home, n=214)
MAIN RESPONSES 5%+

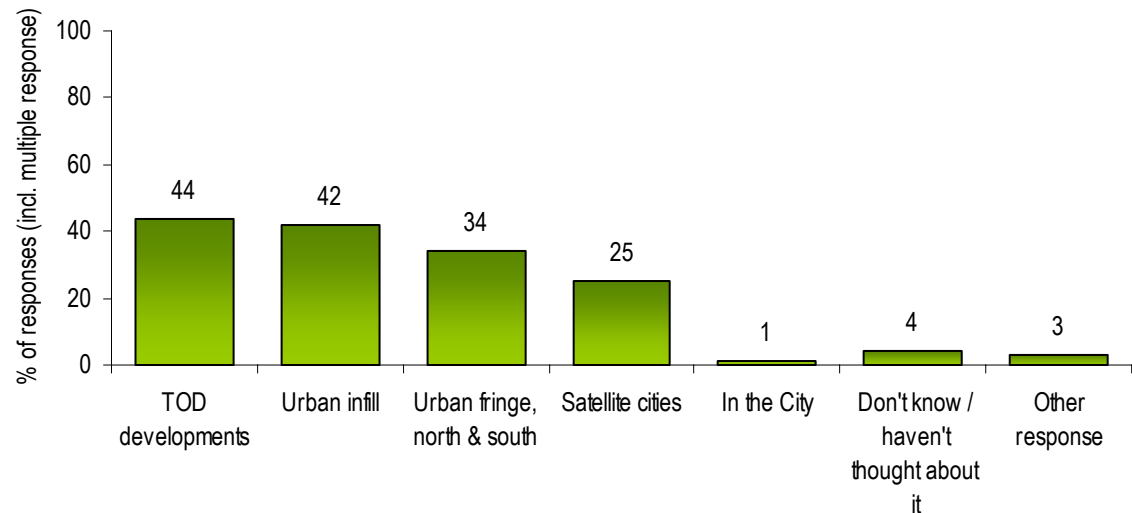


Key findings: Understanding of Higher Density

Q6 Location of New Housing

- When asked where new housing should be located, and given 4 options to choose from, TOD developments and Urban infill were the most prominent responses (44% and 42% respectively).
- A further third (34%) opted for fringe development and a quarter (25%) suggested new housing developments should be in satellite cities.
- Respondents perceived that there is no single solution. For example
 - ~ 45% of those who suggested urban infill also said TOD developments.
 - ~ Nearly half (46%) of those who indicated satellite cities is where new housing should go also said urban fringe.
- Of some concern for the TOD strategy was the finding that among respondents who are currently private renters, 56% thought that new development should be on the north and south fringes.
- Similarly, 47% of 35 to 44 year olds and 49% of households with mainly primary school aged children, indicated they thought new housing should be located on the urban fringe.

WHERE SHOULD NEW HOUSING BE LOCATED?
(n=601)



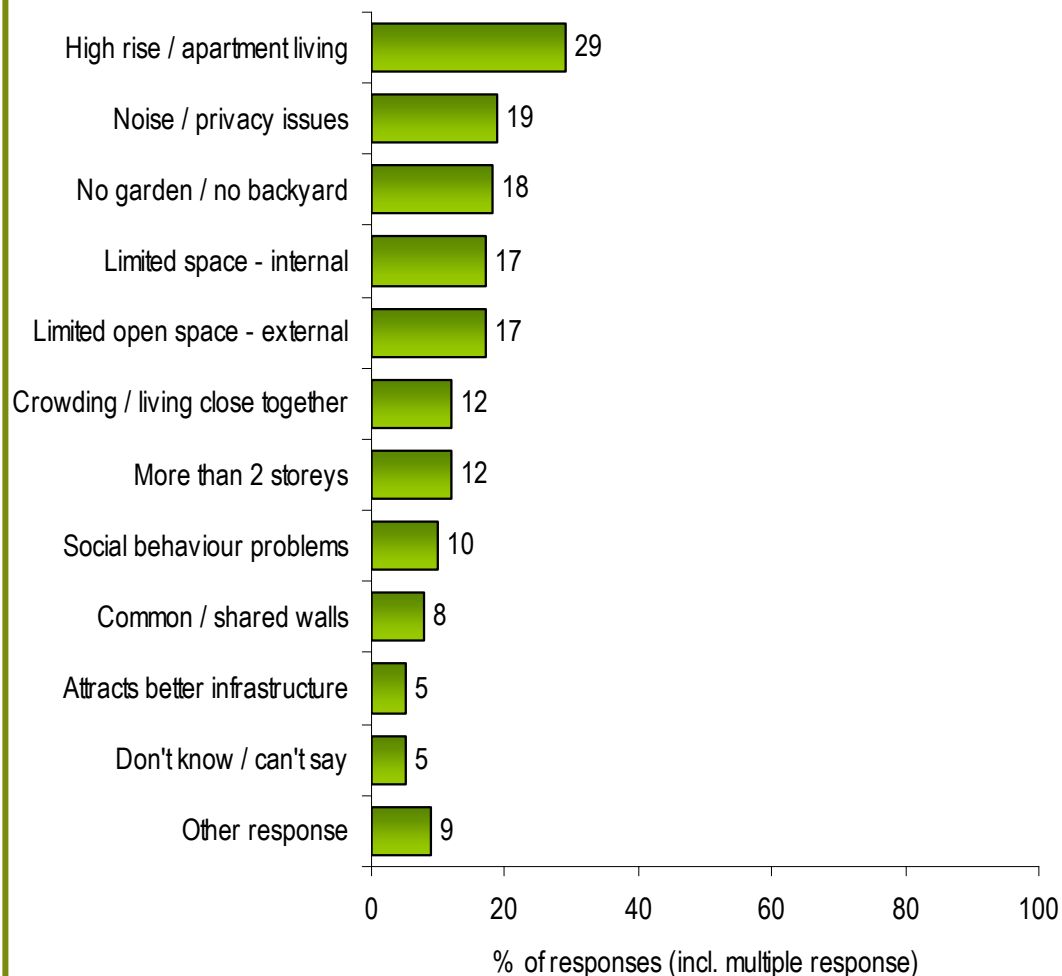
- On the other hand, more than half (55%) of those respondents with a Bachelor or higher degree (the largest educational segment) indicated that urban infill in existing, established suburbs was where new housing should be developed.
- Also showing a high incidence of supporting new housing being urban infill in existing suburbs were respondents who had experienced living in high density overseas (54% said urban infill).



Q8 Description of what higher density living means

- High rise apartments is the top of mind image of higher density living for 29% of respondents.
- Noise / privacy, no backyard, and limited space both inside and outside / open space were the next most common descriptions.
- Crowding, higher than 2 storeys and social behaviour problems were each raised by about 1 in 10 respondents.
- Just 5% of all respondents commented that higher density means better infrastructure. This comment was the only positive description to be raised by at least 5% of the sample.
- Just 1% of respondents (spontaneously) perceived higher density meant less reliance on personal cars, and a further 2% said it meant an improved sense of community.
- This finding suggests that there is considerable community engagement required to increase understanding of the concept and its potential benefits to the community as a whole.
- The most notable differences in understanding of higher density in practice was between genders. Females were significantly more likely to cite that higher density meant no garden / no backyard compared with males (23% versus 10% respectively). Females were also more likely to perceive higher density as having noise / privacy issues (22% versus 14%).

UNDERSTANDING OF HIGHER DENSITY LIVING IN PRACTICE
(n=601) MAIN RESPONSES 5%+



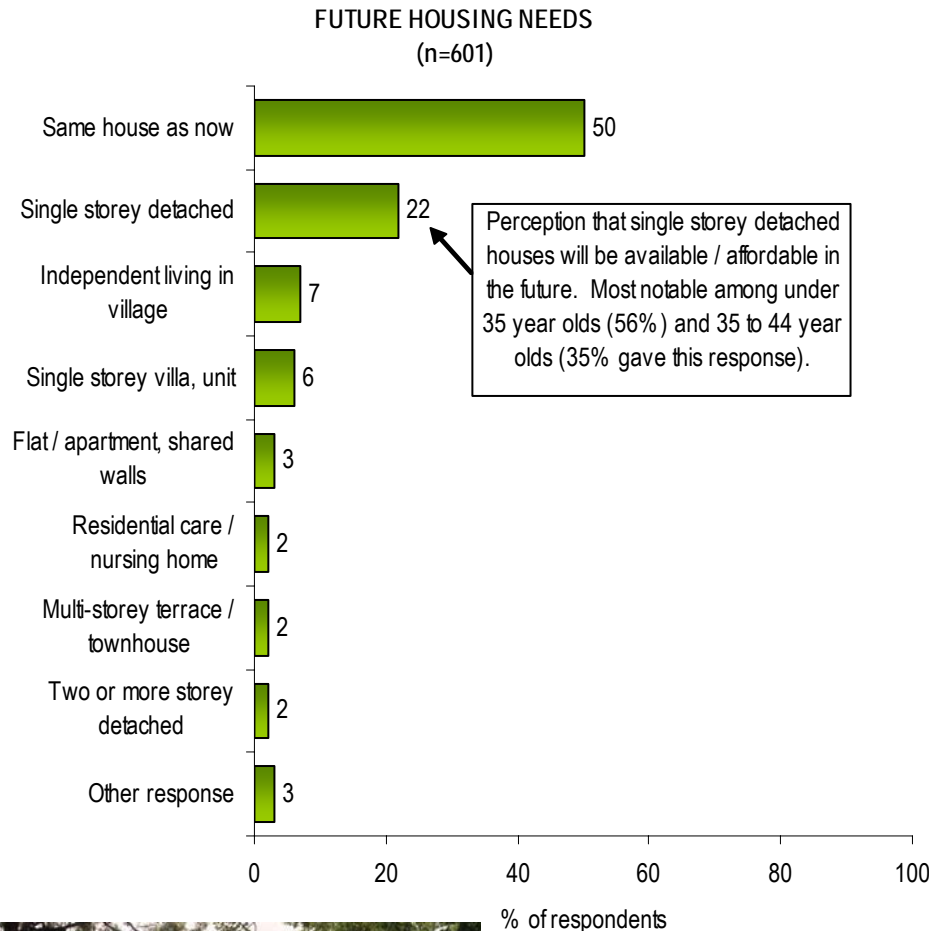
- "Insulation was good overseas. Will be noisy unless they pay attention to sound insulation and break up area with greenery."*

-



Q9 Type of housing they will be living in, in 10 year's time

36



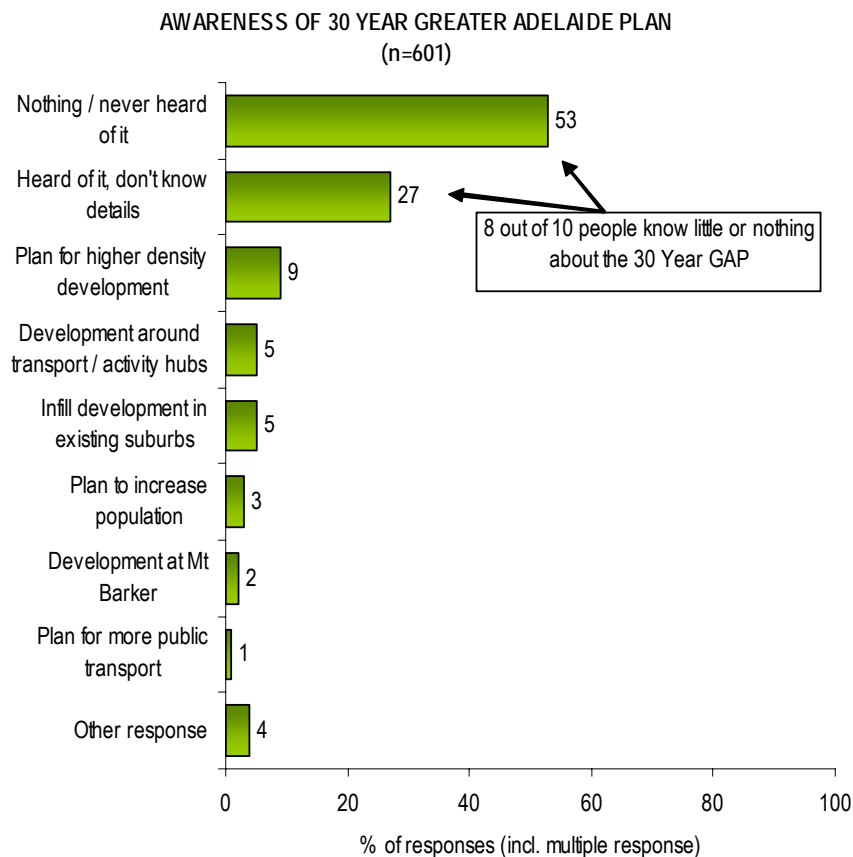
- Half of all respondents believe they will be in the same house as now in 10 year's time.
- There is a perception that the single storey detached house will still be available / affordable in ten year's time. More than 1 in 5 believe that they will live in a single storey detached house, with the proportion increasing to 56% among under 35 year olds.
- Apart from those who perceive they will be living in aged care or an independent living facility, around 1 in 10 respondents perceive they will live in some type of higher density dwelling, from single storey units (6%), flat or apartment (3%) and multi-storey terrace or townhouse (2%).

- Most notable variations were among those in the peak family life-stages currently and also those who are intending to purchase a home within 10 years.
- Almost half (48%) of those who said they intend to purchase a home in the foreseeable future said they expected to be living in a single storey detached house (apart from those who said they would be in the same house as now). Relatively high proportions of respondents with dependent children living at home (from pre-schoolers to teenagers, but not including families with mature adults at home) said they expected to be living in a single storey detached house in ten year's time.



Key findings: 30 Year Greater Adelaide Plan

Q10 Awareness of Plan



- There is clearly a need to improve both awareness and understanding of the 30 Year Greater Adelaide Plan, with 8 out of 10 indicating they know little or nothing about the Plan.
- Whilst this means that 1 in 5 have some knowledge of the Plan, the “Word Cloud” diagram overleaf highlights that the more controversial aspects, such as higher density development at Mount Barker and, to a lesser extent, McLaren Vale, were the main focus of their awareness.

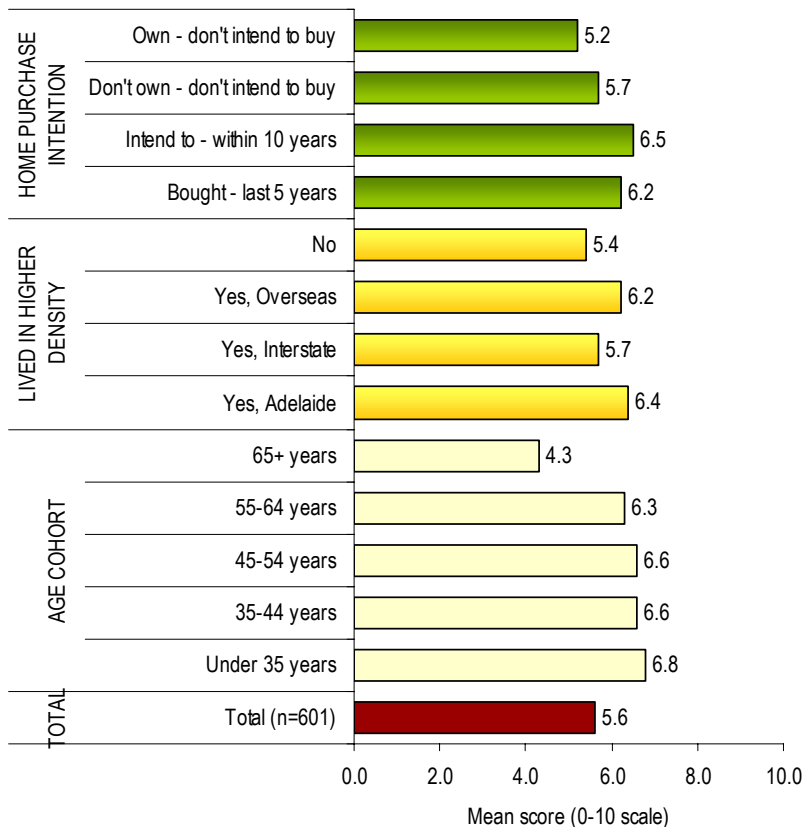




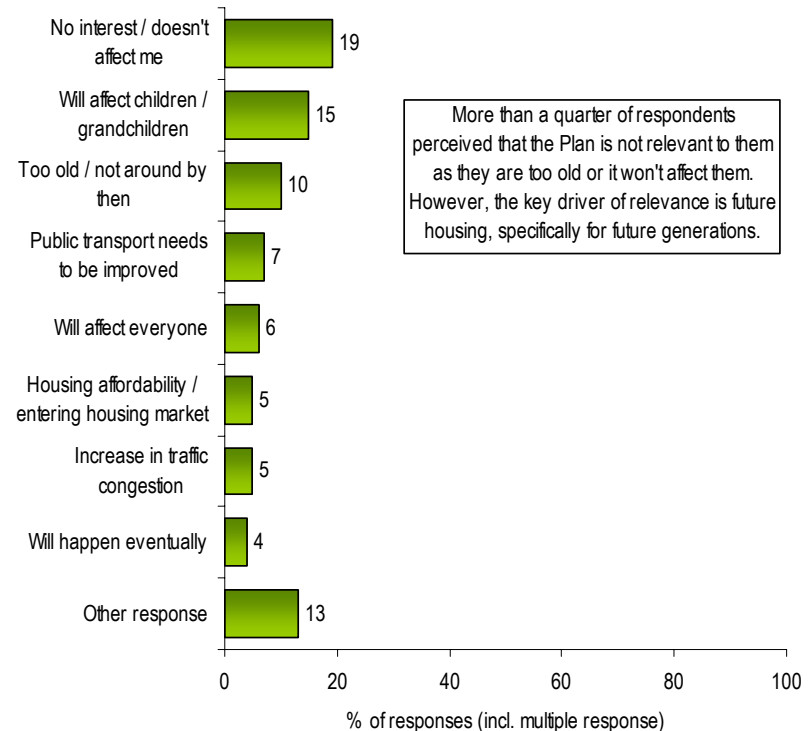
Q11&12 Relevance of 30 Year Plan and Why

- It does not appear to be generally recognised that the 30 Year GAP will affect most greater Adelaide residents, with a mean score for relevance of 5.6 overall (54% rated the relevance at 6 or higher out of 10).
- Positively, those with experience of higher density living, those intending to purchase in the next 10 years and also those under 35 years now rated the relevance slightly higher than other segments.
- The primary drivers of relevance of the 30 Year Plan is to ensure sufficient housing within a reasonable distance for future generations as well as the public transport systems to support transit and reduce reliance on private vehicles. This finding indicates that the central principles of the strategy are understood, even if not among the majority of residents.

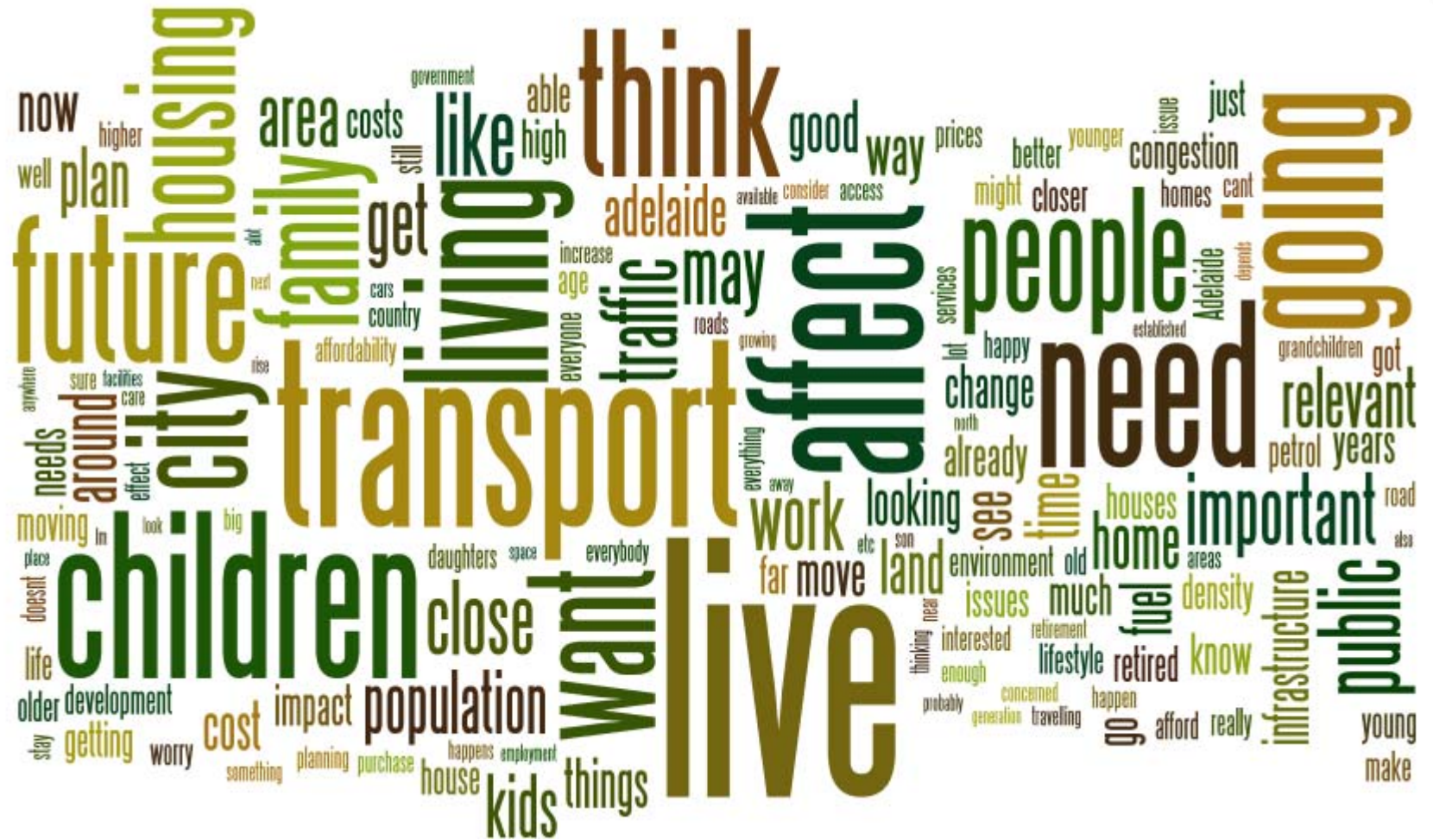
PERCEIVED RELEVANCE OF PLAN (n=601)



WHY 30 YEAR GREATER ADELAIDE PLAN PERCEIVED AS RELEVANT OR NOT TO RESPONDENTS AND THEIR FAMILIES (n=601)

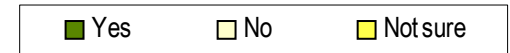


Why 30 Year Greater Adelaide Plan Perceived as Relevant or Not



Key findings: Transit Oriented Development

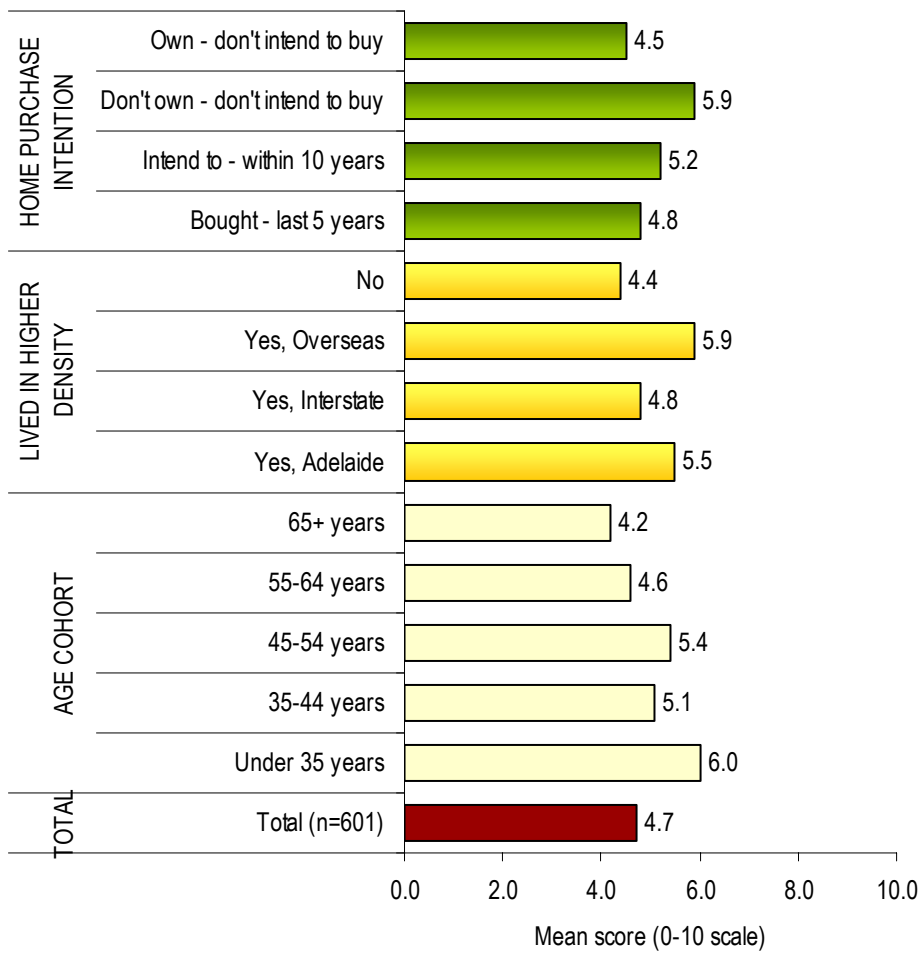
- ### AWARE OF TRANSIT ORIENTED DEVELOPMENTS (n=601)



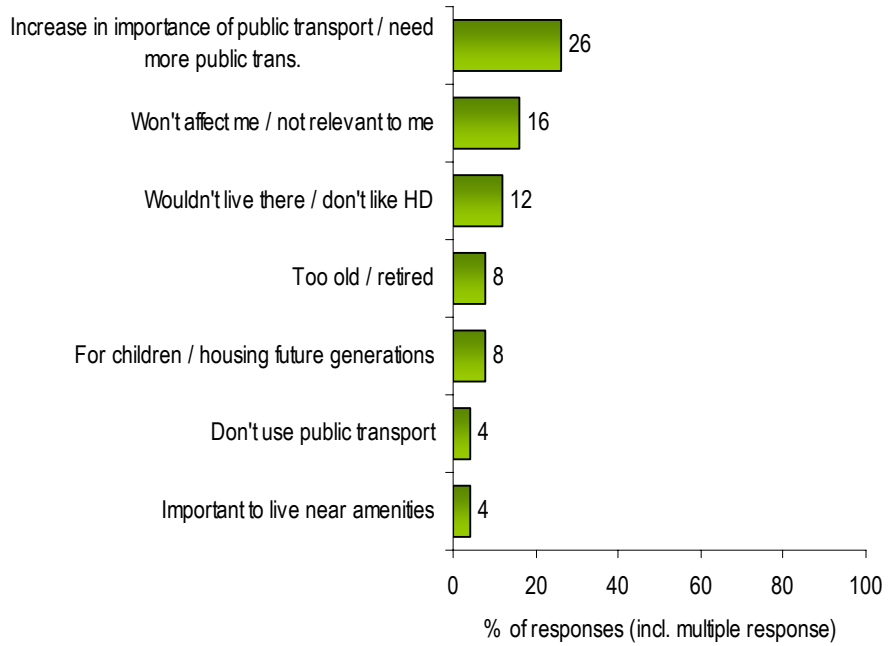
Q14&15 Relevance of TOD's and Why

- The TOD strategy is perceived as slightly less relevant than the 30 Year GAP, with a mean score of 4.7 and 42% rating the relevance at 6 or more out of 10.
- Public transport was the focus of why they felt it was relevant, with most of those who commented on public transport indicating that considerable improvement in transport systems and reliability would be required to transform the TOD strategy into action.

PERCEIVED RELEVANCE OF TOD STRATEGY (n=601)



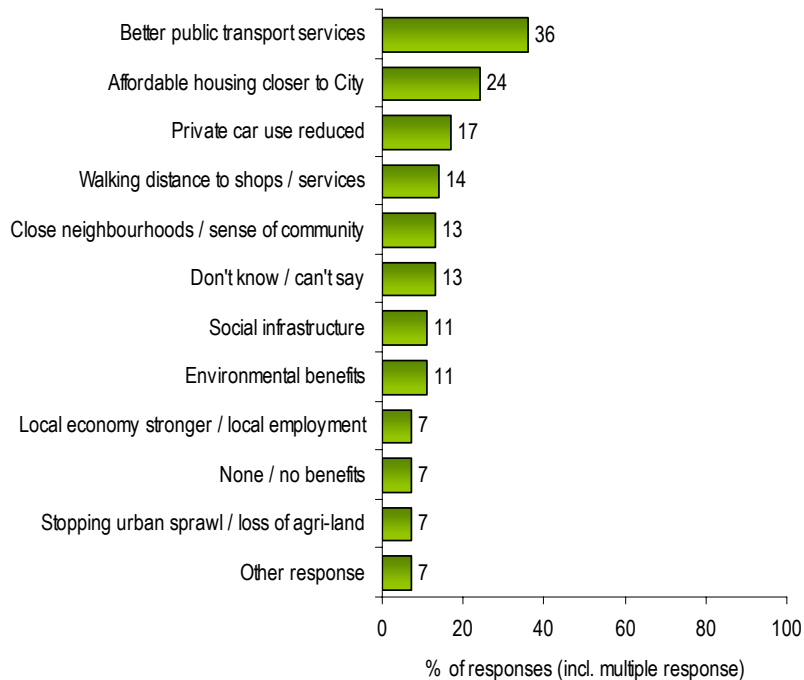
WHY TOD STRATEGY PERCEIVED AS RELEVANT OR NOT TO RESPONDENTS AND THEIR FAMILIES (n=601)



Key findings: Perceptions of Higher Density

Q16 Perceived benefits of TOD's

BENEFITS OF HIGHER DENSITY, TOD DEVELOPMENT TO WIDER COMMUNITY - UNPROMPTED, MR (n=601)

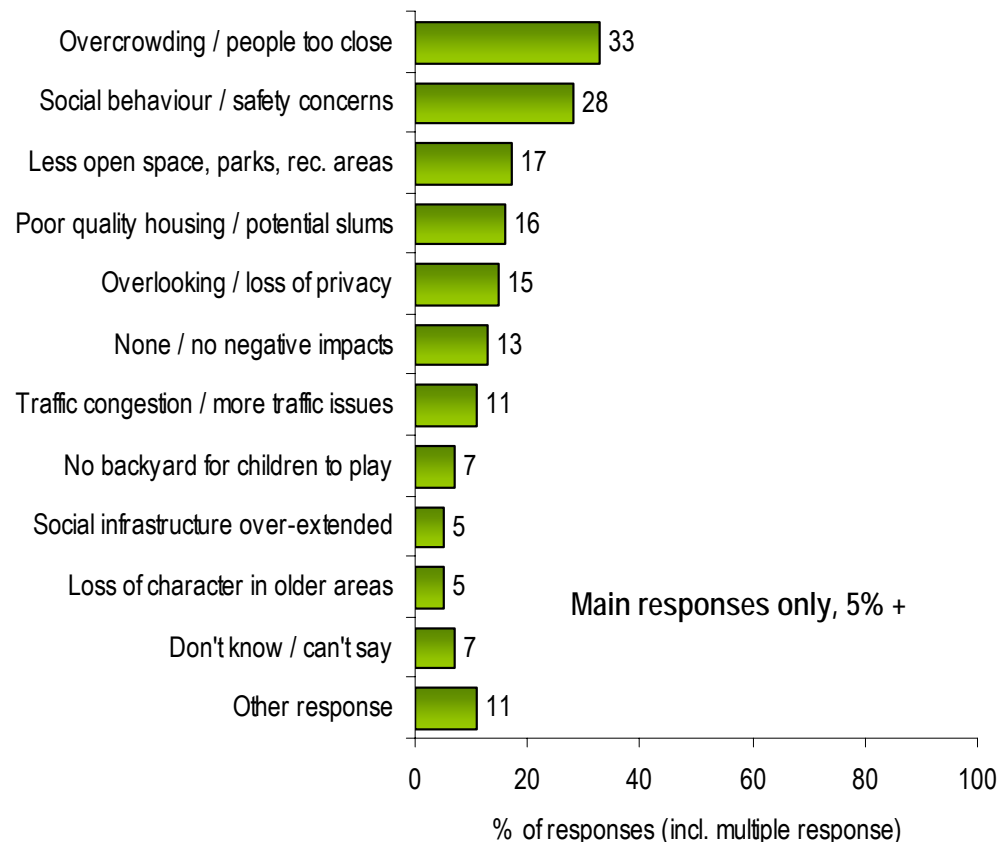


- Improved public transport is thought to be the key benefit of TOD's (36%), although affordable housing closer to the CBD was raised by 1 in 4 respondents as a benefit of the TOD strategy.
- Other benefits raised included reduction of private car use, ability to walk to shops and services, closer neighbourhoods / sense of community, more social infrastructure and environmental benefits.
- Positively, just 7% of respondents thought there were no benefits from TOD's and a further 13% could not think of any.
- Of interest was the finding that, among under 35 year olds, 53% indicated better public transport was a benefit, 23% said environmental benefits and 16% said the local economy would be stronger (versus 7% of all respondents). This finding suggests a more positive perception of the benefits of TOD's among the primary target segment of higher density living.
- Also interesting was the finding that, among those who currently drive a personal car for regular trips, a relatively high proportion (39%) indicated that better public transport services was a benefit of the TOD strategy.

Q17 Perceived negative impacts of TOD's

- Overcrowding and the resultant social behaviour and safety concerns were the key negative impacts mentioned (33% and 28% respectively).
- Other concerns included less open space, poor quality housing and loss of privacy (17%, 16% and 15% respectively).
- Positively, more than 1 in 10 perceived no negative impacts of TOD's, with mature families (parents with mainly adult children at home) more likely to feel this way (23%), possibly due to the potential life-change when their children leave home or as potential accommodation for their adult children.
- Traffic congestion was raised by 1 in 10 respondents, suggesting that at least some of the population do not anticipate sufficient improvement in public transport services to effectively reduce private car use.
- Also noted was a significantly high incidence, among those who have lived in higher density (either in Adelaide or interstate, but not among those who have lived in higher density overseas), of stating that social behaviour / crime was a negative impact of living in higher density TOD's (43% and 40% versus 28% of all respondents).
- There were few variations when analysed by socio-demographic sub-groups. However, of note was the finding that, among respondents who currently live in a flat or apartment (representing 7% of the total sample), a relatively high 12% mentioned noise as a negative aspect (versus 2% overall).

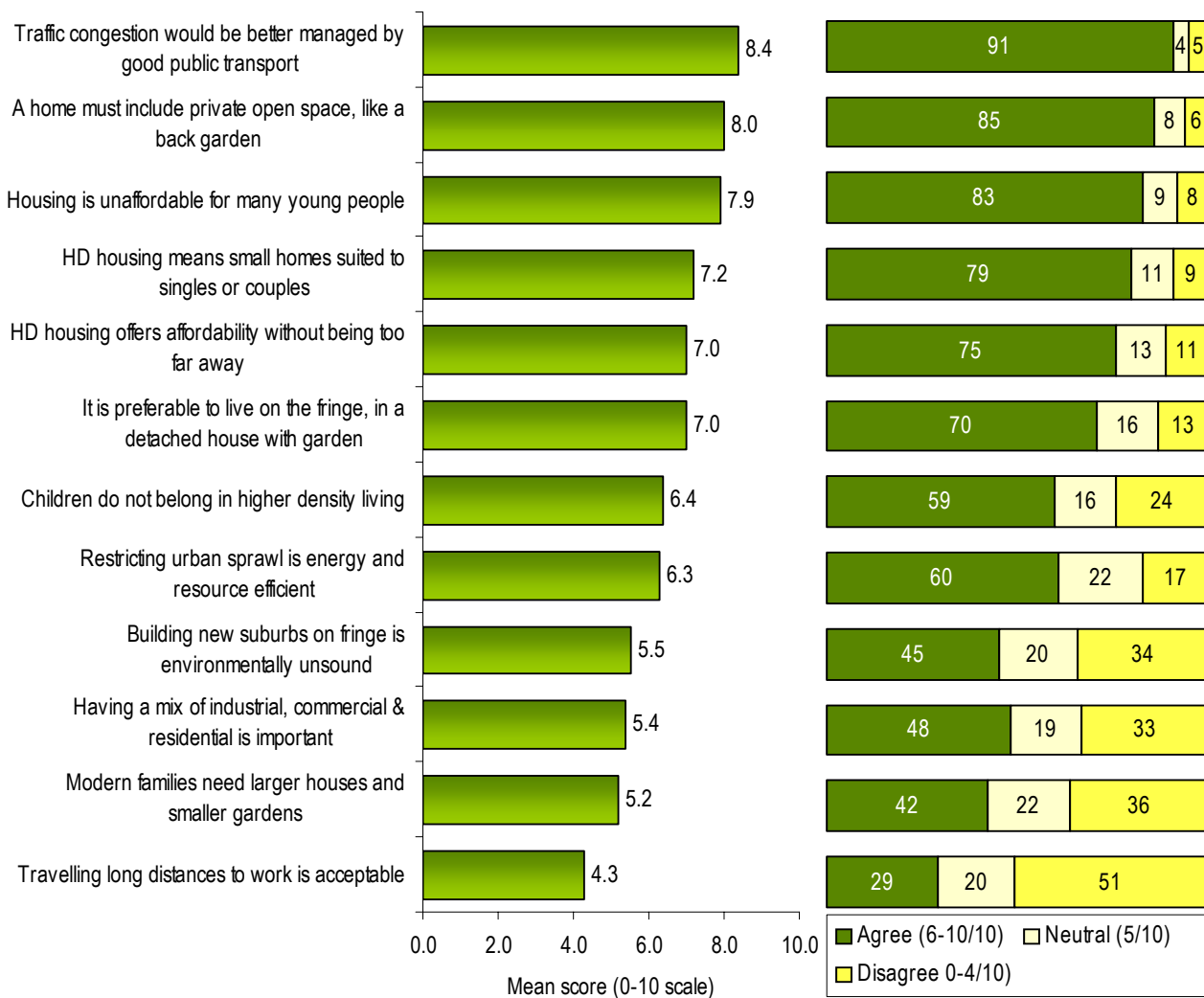
NEGATIVE ASPECTS OF HIGHER DENSITY, TOD DEVELOPMENT UNPROMPTED, MR (n=601)



Key findings: Attitudinal Concepts

Q18 Attitudes to aspects of higher density and TOD's

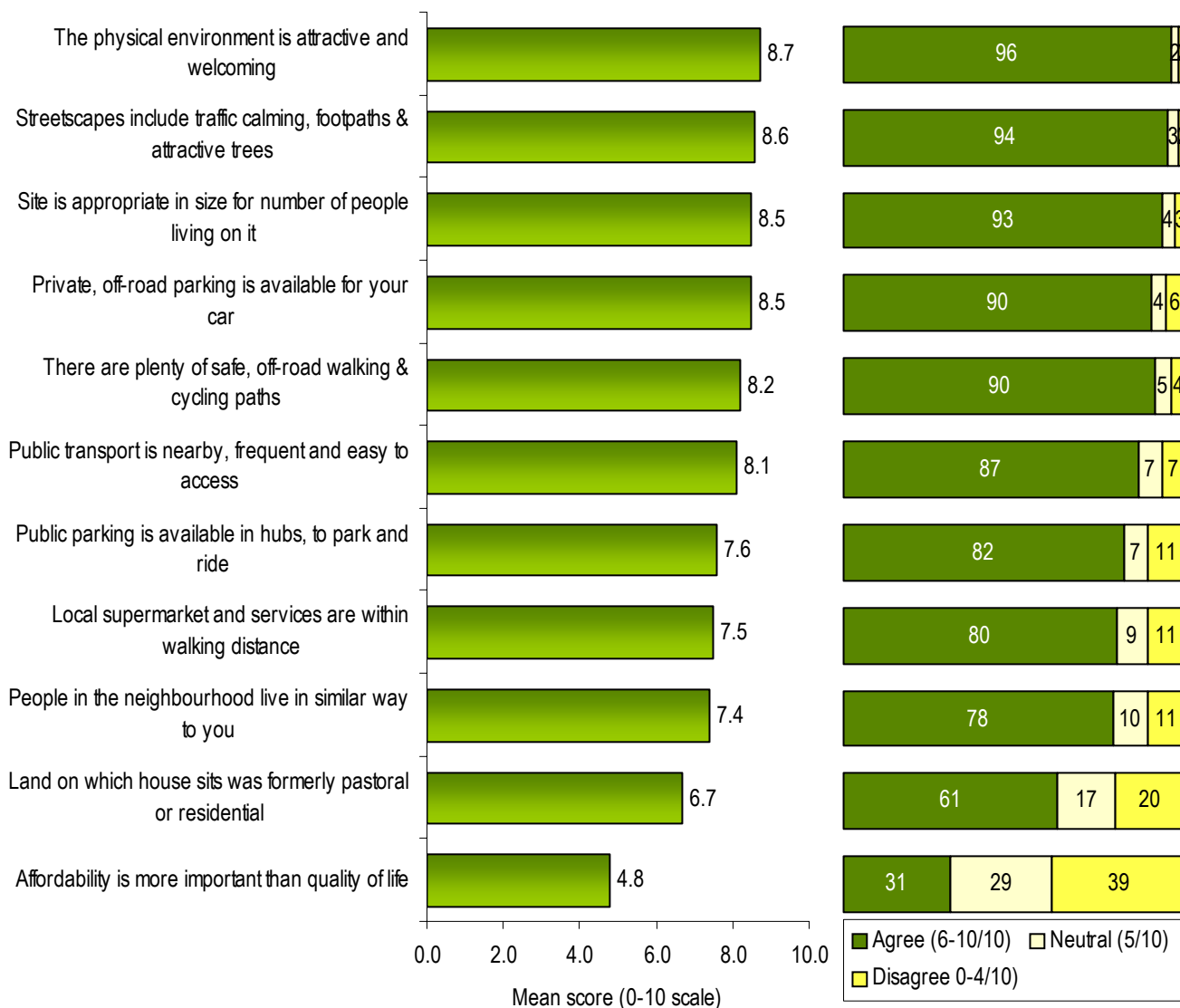
ATTITUDES TO ASPECTS OF HIGHER DENSITY AND TOD (n=601)



- A series of statements reflecting potential attitudes towards specific aspects of higher density living and TOD's were read to respondents and they were asked to indicate their level of agreement with each.
- The two graphs demonstrate clearly the outcomes, the first showing overall mean score (0-10 scale) and the second showing the proportions agreeing, remaining neutral and disagreeing.
- Whilst most of these findings reflect the outcomes to be anticipated logically, an interesting point is that 1 in 4 do not agree that children do not belong in higher density living.
- The findings also highlight that a third of the Adelaide metropolitan population do not agree that fringe development is environmentally unsound. This reveals gaps in understanding which perhaps could be addressed through social marketing.

Q19 Important aspects in housing decisions

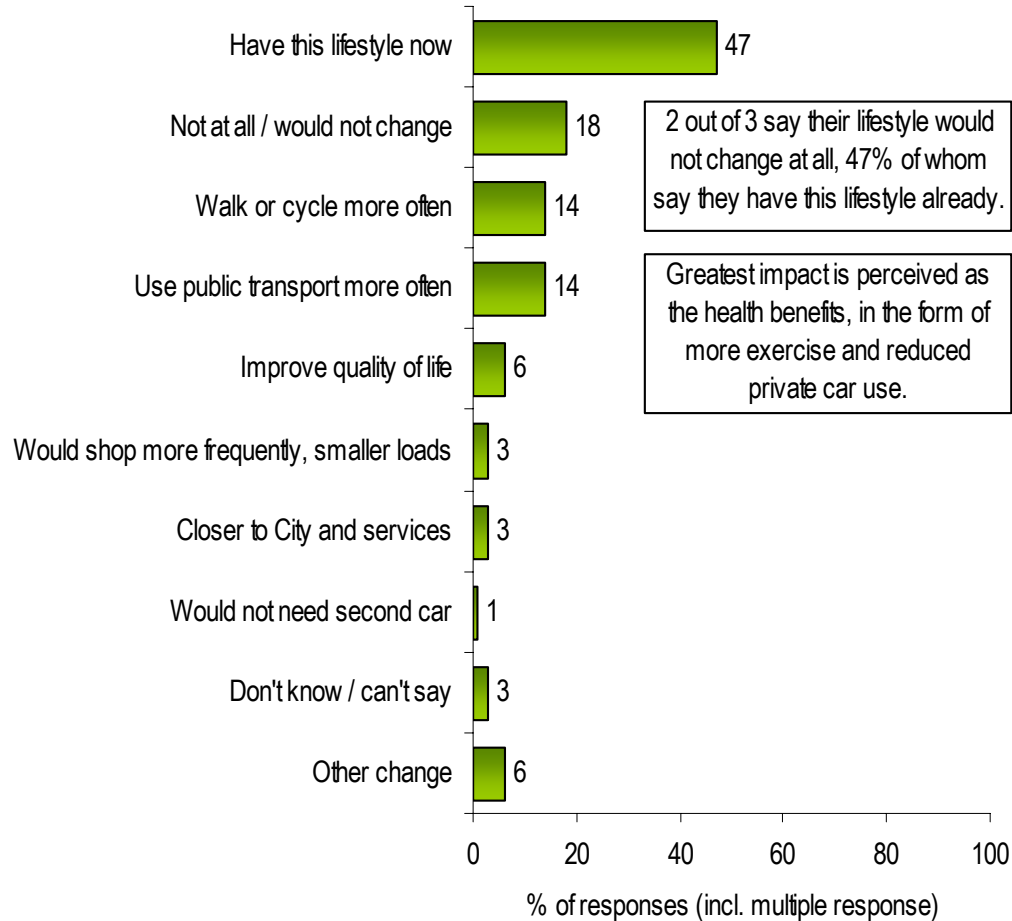
IMPORTANT ASPECTS IN HOUSING DECISIONS (n=601)



- A series of statements reflecting important aspects in housing decisions were read to respondents and they were asked to indicate their level of agreement with each.
- The two graphs demonstrate clearly the outcomes, the first showing overall mean score (0-10 scale) and the second showing the proportions agreeing, remaining neutral and disagreeing.
- Whilst these findings also reflect logical outcomes, it is interesting to note the divisiveness among respondents for the statement that affordability is more important than quality of life.

Q20 TOD versus current lifestyle

Imagine living near public transport, with a range of shops & services nearby and work either a short bus trip or within cycling or walking distance. In what ways, if any, would this be different to your current lifestyle? (n=601)

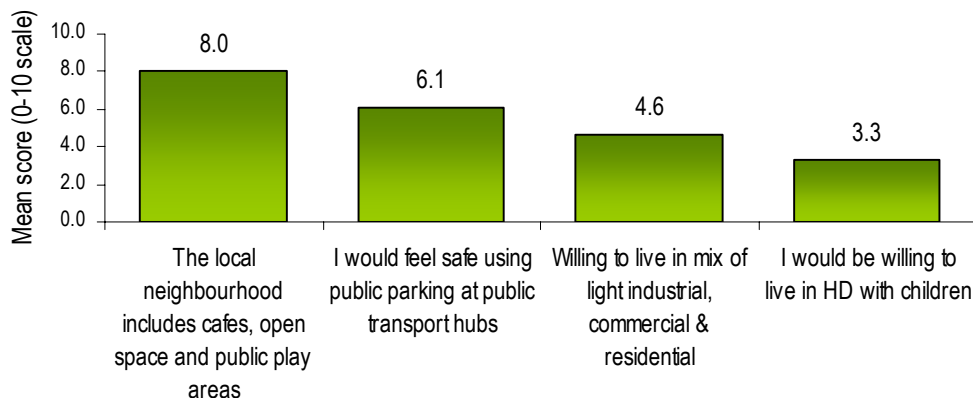


- Apart from those who said they have this lifestyle now, the most commonly mentioned impacts were walk or cycle more often and use public transport more often.
- This improvement in health benefits would impact more on some socio-demographic segments than on others:
 - Walk or cycle more often was raised more frequently among 35 to 44 year olds (22%), 45 to 54 year olds (20%), those with a current mortgage (20%), those with pre-school children (25%), those with teenagers at home (22%), those in full-time employment (19%) and those with a Bachelor degree or higher (19%).
 - Use public transport more often was more likely to be raised by a similar profile, including those with a current mortgage (18%), those with teenagers at home (22%), those in full-time employment (18%) and those with a Bachelor degree or higher (20%).

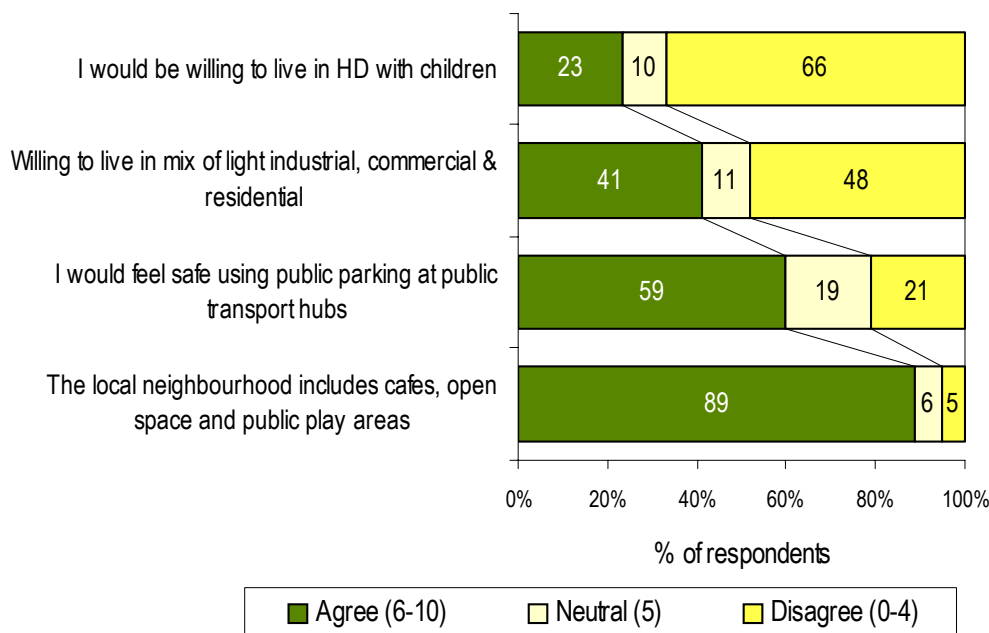
Q21 Attitude to lifestyle statements

52

ATTITUDE TO LIFESTYLE STATEMENTS (n=601)



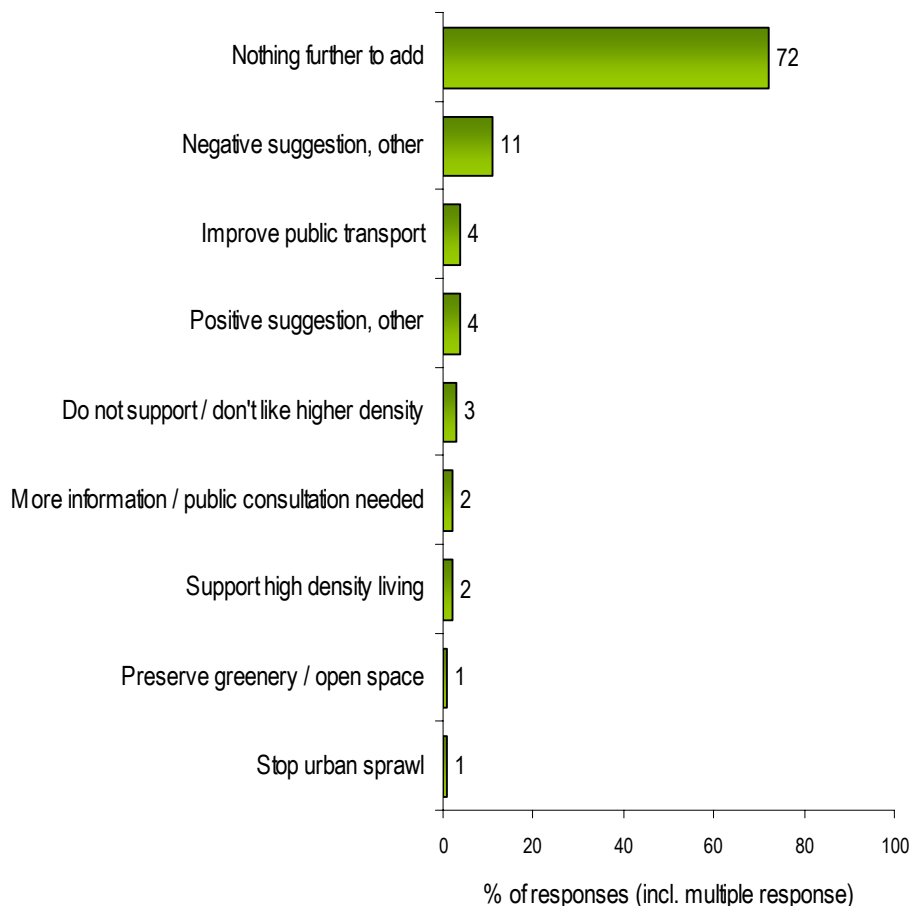
ATTITUDE TO LIFESTYLE STATEMENTS (n=601)



- Four statements reflecting attitudes to specific lifestyle attributes were read to respondents and they were asked to indicate their level of agreement with each.
- Not surprisingly, the statement accorded the highest mean score was for “the local neighbourhood includes cafes, open space and public play areas” (8.0 mean, 89% agreed).
- Nearly 6 out of 10 respondents agreed they “would feel safe using public parking at public transport hubs”, with an overall mean of 6.1.
- Responses were divided when it came to a willingness to live in a “mix of light industrial, commercial and residential”, with 52% either agreeing or neutral and 48% disagreeing and an overall mean of 4.6 reflects this division.
- Agreement was lowest for the statement “I would be willing to live in higher density with children” (3.3 mean), with 2 in every 3 respondents disagreeing. Among parents with mainly primary school-aged children (middle family life-stage) more than 8 out of 10 respondents disagreed (mean score 2.5).
- Also notable was the finding that, among respondents with experience living in higher density (either interstate or overseas), a higher level of willingness to live in higher density with children was revealed (4.4 and 4.5 respectively). This finding suggests that, among those with limited experience with higher density, misconceptions regarding children living in medium to high density are relatively common.

Q24 FURTHER COMMENTS / SUGGESTIONS

FURTHER COMMENTS OR SUGGESTIONS REGARDING TODS OR HIGHER DENSITY IN GENERAL (n=601)



- The majority(72%) had nothing further they wished to add, regarding TOD's or higher density developments in general.
- Apart from individual comments and suggestions, improving public transport before the TOD's are developed was the most common theme in the suggestions (mentioned by 4%).
- Whilst only 2% suggested that more information and / or public consultation is needed on higher density and TOD's, this has been a common theme throughout the research and is further highlighted by 8 out of 10 respondents indicating they would like further information (or more active involvement.)
- The two diagrams on the following pages demonstrate that the themes were identical, regardless of whether or not the comment or suggestion was positive or negative.
- The exception to this was the more frequent use of the word "good" in the positive comments and repetition of the words "children" and "need" in the negative comments.
- .

"They sound like a very good idea. We have a problem with people building two storey mansions with only two people living in them and no gardens. The only option for the future for these type of dwellings is to turn them into flats as has happened in London. It would be better to build purpose-built units to start with."



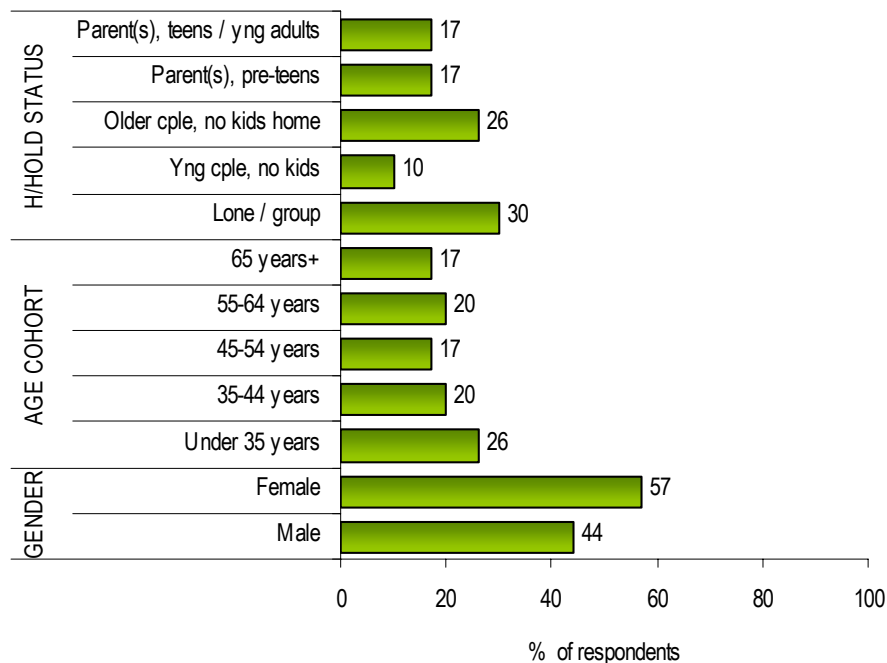
"I find for Aboriginal people to access private rental nearly impossible, but high rise apartments would be hard for us to live in."



Section 4: Online Survey

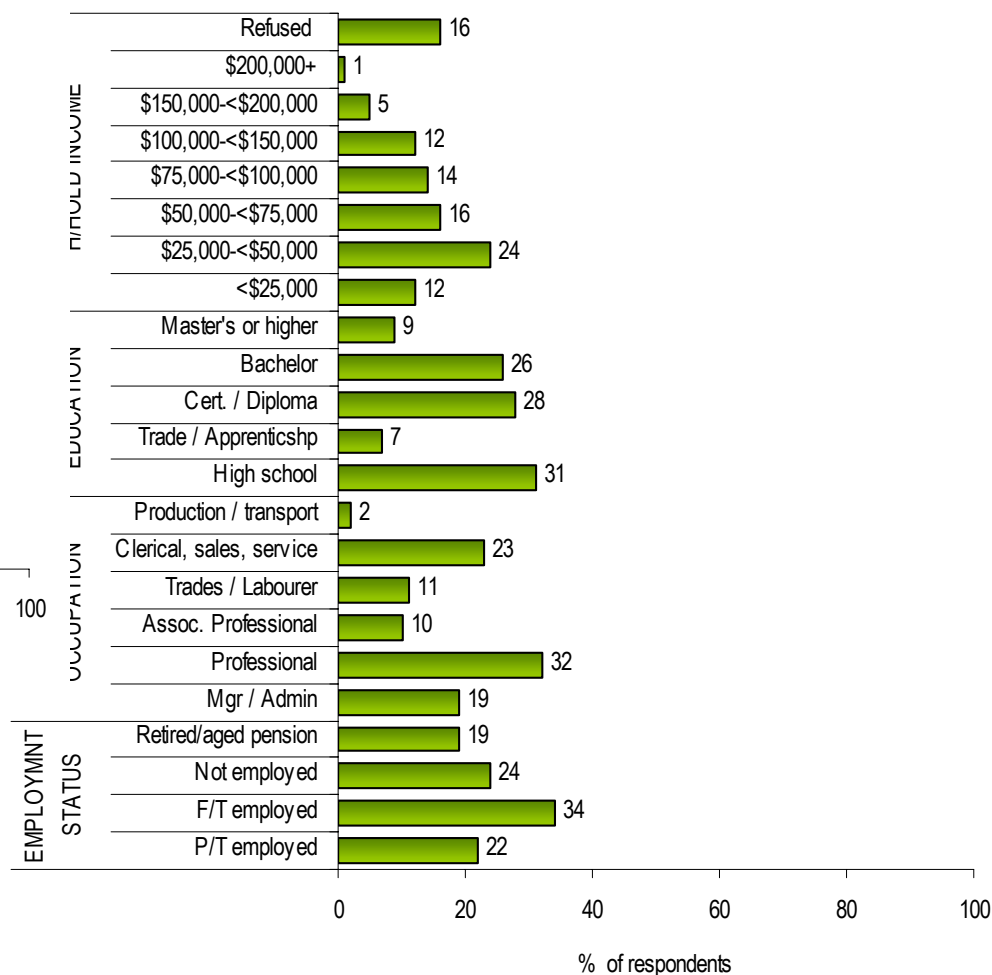
- In addition to the CATI survey, an Online survey was also undertaken to complement the data collected via telephone and provide the opportunity to prompt with visual information where technical definitions differ from common interpretation. Photographs of various styles were included to test preferences both for built form and for the wider community lifestyle.
- The final sample was n=600 housing decision makers (18 years and older) living in metropolitan Adelaide. This sample size provided the same level of reliability as the CATI sample (i.e. $\pm 3.99\%$ @ 95% CL), to provide valid knowledge of preferences and attitudes towards higher density housing and also enable analysis across socio-demographic segments.
- The sample for the Online survey was purchased from an internationally accredited panel provider (The ORU, Online Research Unit, Sydney). The programming and design of the instrument was undertaken by Harrison Research, so a final instrument was sent to ORU to forward to panel members. The criteria for participation was that they live in metropolitan Adelaide and also make decisions about the type of housing and where they would live.
- The survey instrument was designed by Harrison Research, with input from both the clients and also from the secondary research conducted in the first phase of the project. All stakeholders had input into the questionnaire, particularly in terms of selecting various housing and lifestyle designs to test the market appeal, but also to allow for special interest topics to be included (e.g. affordable housing, healthy living, sustainability, transport options etc.).
- The Online survey included a Choice Modelling exercise, which examines the hidden drivers of choice when responding to various combinations of attributes. An overview of the findings from this exercise is included in the following report.
- The remainder of this report outlines the highlights of the Online survey. Note that reliability at sub-group level is lower than at the total sample level, and only statistically significant findings at sub-group level are mentioned in the following analysis.

SOCIO-DEMOGRAPHIC PROFILE



- The sample was slightly skewed towards females, but represented a wide range of ages, including 26% under 35 years and 17% 65 years and older. 2 out of 3 (66%) were living in households with no children.
- More than half (52%) of respondents reported an annual gross household income of less than \$75,000.
- More than half (56%) were employed, with professional and clerical, sales or service occupations being the most common.

SOCIO-ECONOMIC PROFILE

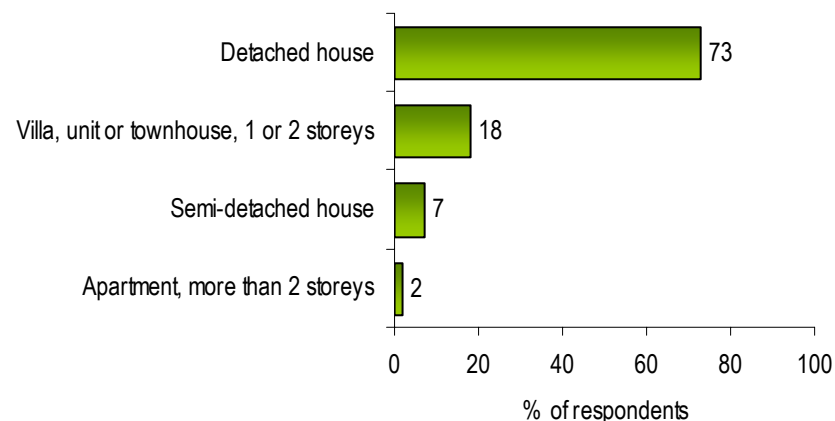


Key findings: Housing Profile

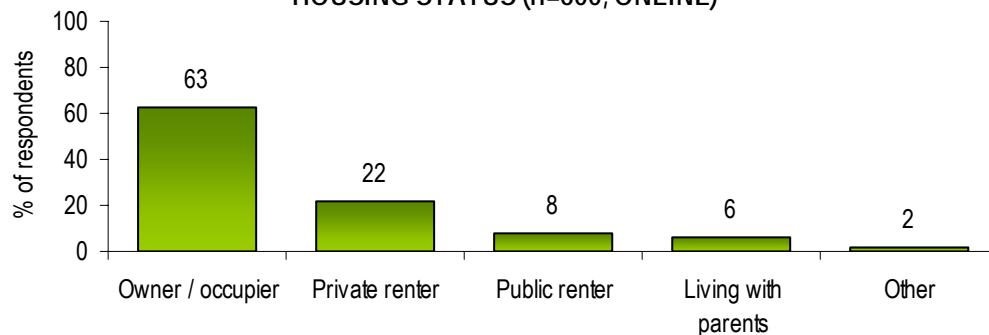
Q1&2 Type and status of housing currently

- As with the telephone survey, a single storey detached house is the most common form of dwelling.
- A further 18% of Online respondents live in a villa, unit or townhouse of 2 storeys or less, 7% in a semi-detached house and 2% in an apartment of more than 2 storeys.

CURRENT DWELLING TYPE (n=600, ONLINE)



HOUSING STATUS (n=600, ONLINE)

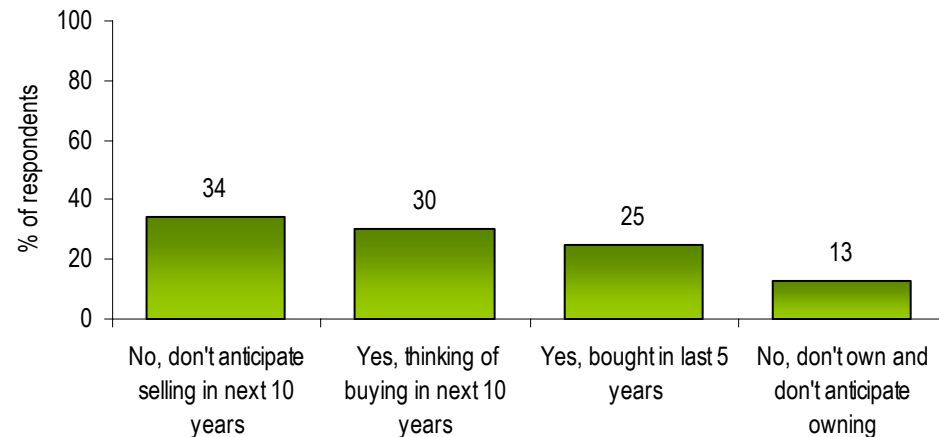


- Just over 6 out of 10 respondents are an owner/occupier, considerably lower than the 8 out of 10 recorded among the telephone respondents.
- A fifth (22%) are private renters (versus 6% of phone respondents), whilst 8% are public renters (versus 7%) and a further 6% are living with parents (versus 1%).
- The reasons for the differences are the socio-demographic make-up of respondents in the two surveys. The Online survey sample was represented by higher proportions of under 35 year olds and lower proportions of those 65 years and older. More people with a landline are in the older age cohorts and also tend to have lived in the same house for many years.

Q3 Recent or future purchase intentions

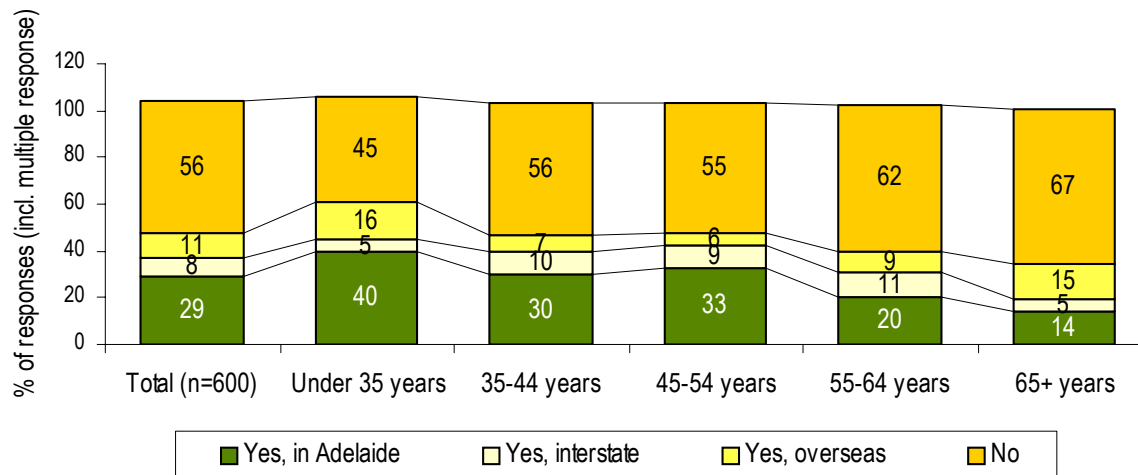
- Just over half of those surveyed have either purchased a home in the last five years (25%) or are thinking of buying within the next 10 years (30%).
- A third do not anticipate selling their home within the next 10 years, whilst 13% don't own a home and don't anticipate owning a home in the future.
- Under 35 year olds (representing 26% of the sample) were most likely to have either bought a home in the last 5 years (39%) or be thinking about purchasing within 10 years (43%), particularly compared with those 55 years and older.

RECENT OR FUTURE PURCHASE OF HOME (n=600, ONLINE)



Q7 Higher density living experience

EXPERIENCE WITH HIGHER DENSITY LIVING (n=600, ONLINE)



- More than 2 in 5 of those surveyed have experienced higher density living, either in Adelaide, interstate or overseas. 4% had experienced higher density in more than one of these.
- Under 35 year olds showed a relatively high proportion to have experienced higher density living in Adelaide, again particularly compared with those 55 years and older.

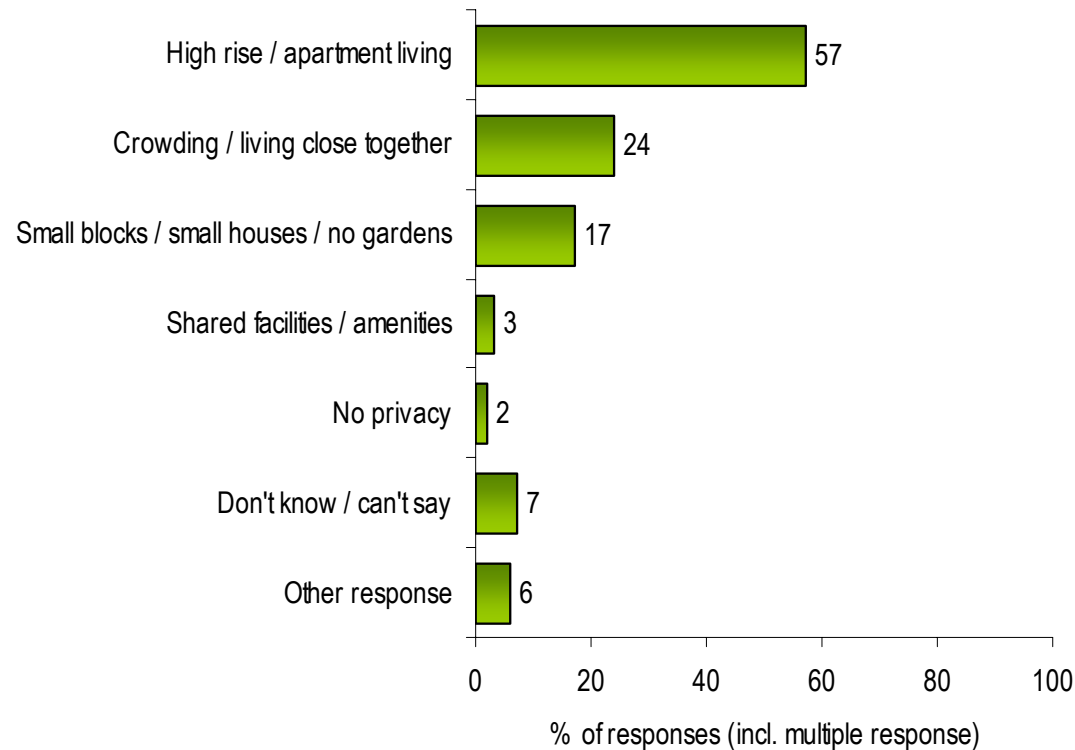
Key findings: Understanding of Higher Density

Q5 Description of what higher density living means

- The predominant top of mind understanding of higher density living in practice was high rise / apartment living (57%).
- Crowding and having small blocks / no gardens were the other common perceptions (24% and 17% respectively).



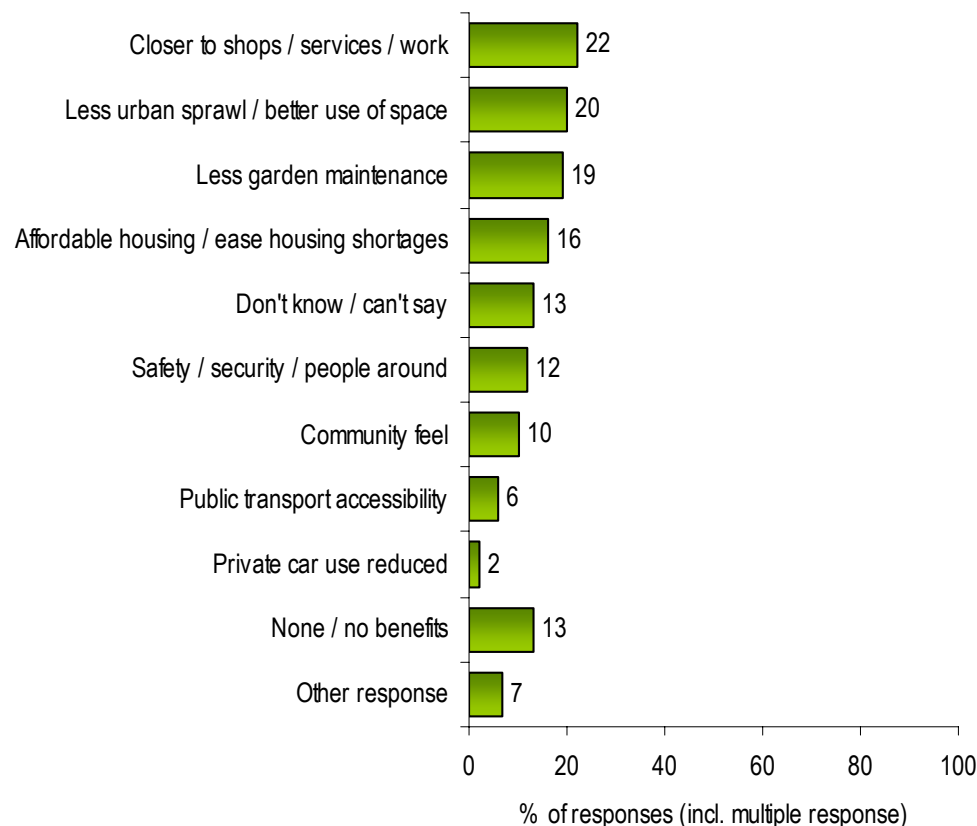
UNDERSTANDING OF HIGHER DENSITY LIVING IN PRACTICE
(n=600, ONLINE)



Q6 Perceived advantages of higher density

- Whereas those who were surveyed by telephone thought that better public transport services was the primary advantage of higher density development and TOD's, those surveyed online tended to see a wide range of advantages and just 6% mentioned it would lead to better public transport accessibility (vs 36%).
- Closer to shops and services (22%), less urban sprawl (20%), less garden maintenance and more affordable housing / easing of housing shortages (16%) were the key advantages raised Online.
- Among Online respondents who have previous experience living in higher density, either interstate or overseas, significantly high proportions cited aspects of TOD's such as being closer to amenities / shops (34%), the sense of community (18%), safety with more people around (18%) and public transport accessibility (14%) compared with other sub-groups. This finding demonstrates that prior knowledge of higher density is a key factor in understanding the community benefits to be accrued from this type of development.
- Nearly 1 in 5 mentioned personal advantages to living in higher density, in particular less garden maintenance. A profile of those most likely to perceive this aspect as an advantage were: female, 55 to 64 years, living in a detached house as the owner, and anticipate spending \$400,000 or more if they were to purchase higher density housing. This profile typifies those who may look to downsize, once their children have left home.
- Having commented on these variations, it should be noted that there were no other significant findings across socio-demographic segments and therefore no evidence of which advantages may appeal to younger purchasers.

BENEFITS OF HIGHER DENSITY, TOD DEVELOPMENT TO WIDER COMMUNITY - UNPROMPTED, MR (n=600, ONLINE)

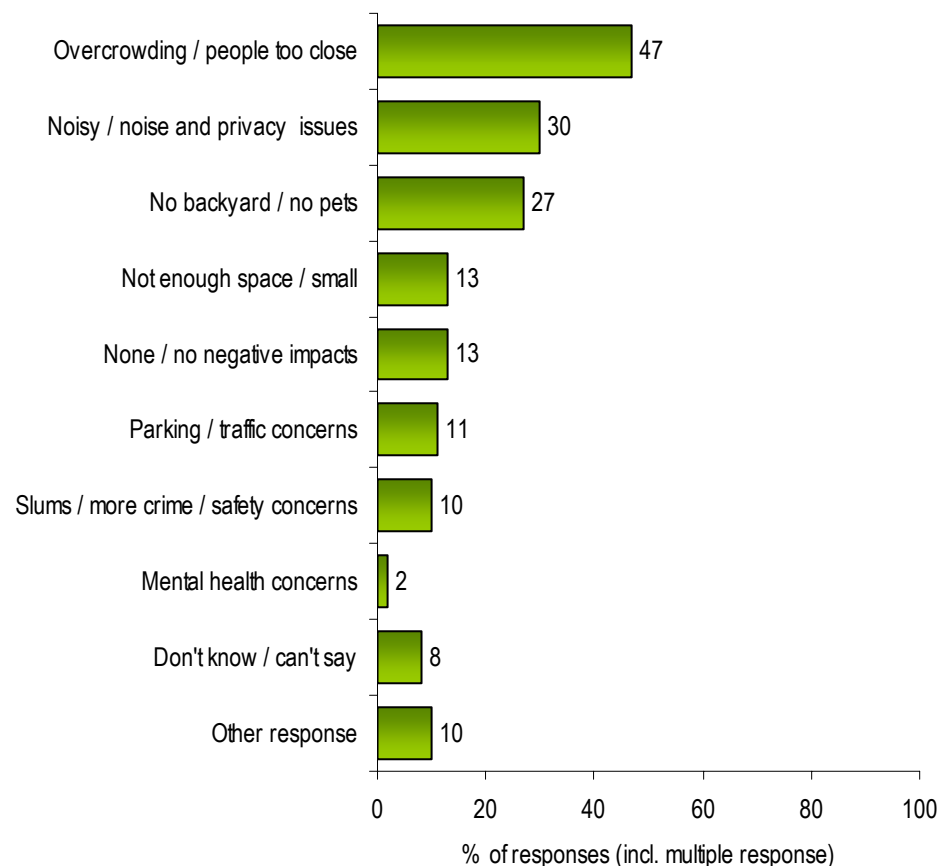


Q6 Perceived disadvantages of higher density

65

- Nearly half of the Online respondents perceive over-crowding / people living too close as a key disadvantage of higher density TOD's (versus 33% of CATI respondents mentioning this issue).
- Along similar lines, noise and privacy was a concern for nearly 1 in 3 respondents (30%), in particular among those who have experienced higher density living, either interstate or overseas (49% of this group raised this issue). Also showing a relatively high incidence of citing noise were those expecting to pay \$400 per week in rent or more (45% said noise), those in professional occupations and those educated to Bachelor degree or higher. This seems to suggest that those concerned about noise levels in higher density are more likely to fit the profile of upmarket purchasers / renters with high expectations of privacy and quiet possession.
- Not having a back garden, in particular for pet dogs, was perceived as an issue for 1 in 4 (27%). This was particularly notable among females, 55 to 64 year olds and those who consider the purchase price for higher density dwellings to be \$400,000 or more. In other words, the same segment who also indicated that not having a back garden was an advantage due to less maintenance required.
- Among the 13% of Online respondents raising the issue of not enough space / housing too small, a relatively high proportion of under 35 years (18%), young couples with no children (24%), and those with a household income between \$100,000 and \$150,000 (23%) mentioned this issue. As this profile may represent a primary target market for medium to high density TOD's, it provides some insights into the features the primary market will require – living spaces large enough for future family growth and offering privacy and a sense of neighbours not being too close.

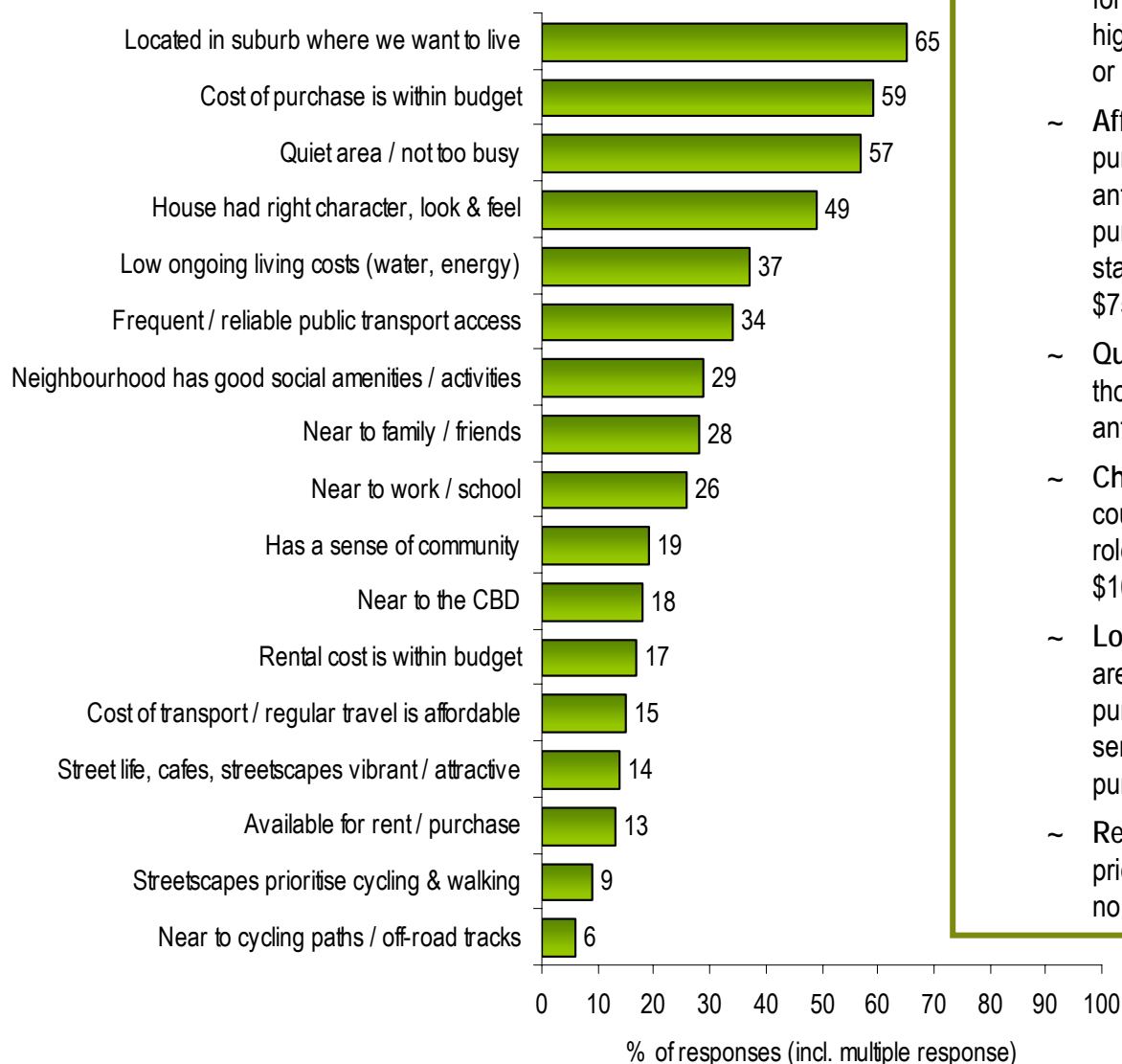
NEGATIVE ASPECTS OF HIGHER DENSITY, TOD DEVELOPMENT
UNPROMPTED, MR (n=600, ONLINE)



Q8 Priorities in selecting a place to live

66

TOP FIVE PRIORITIES WHEN LOOKING FOR A HOME
PROMPTED, MR (n=600, ONLINE)



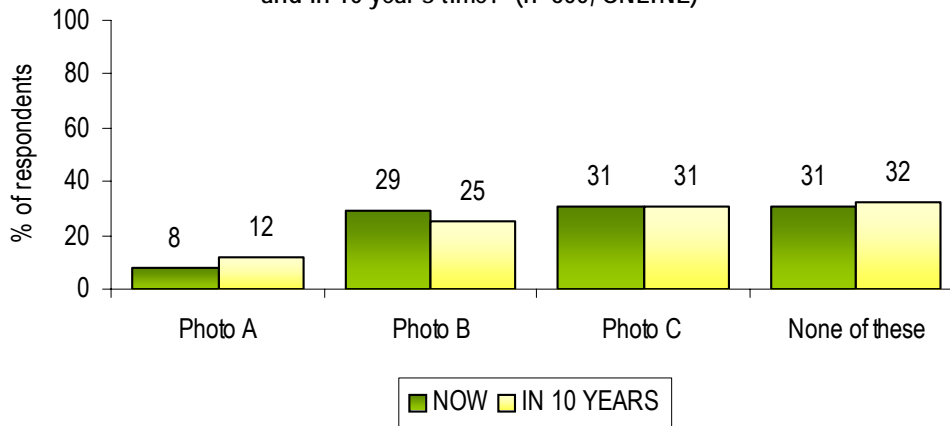
- The top priorities when selecting a place to live were:
 - ~ **Desirable location** (particularly important to owner/occupiers, those who have lived in the same house for a long time, respondents who have never lived in higher density and those anticipating spending \$400,000 or more to purchase).
 - ~ **Affordability** (particularly among those who have purchased a home in the last 5 years, those who anticipate spending between \$250,000 and \$400,000 on purchase, families at young, middle and mature life-stages and those with a household income between \$75,000 and \$100,000 per annum).
 - ~ **Quiet area** (although less important to under 35 year olds, those living in semi-detached dwellings now and those anticipating purchase of a home within 10 years).
 - ~ **Character home** (more important priority for young couples with no children, those in manager / administrator roles and those with a household income of at least \$100,000 per annum).
 - ~ **Low ongoing living costs** (a higher priority for those who are price sensitive [i.e. <\$250 week rental and <\$250,000 purchase price], 55 to 64 year olds, currently living in semi-detached, do not own a home and don't anticipate purchasing).
 - ~ **Reliable public transport access** (more appealing to price sensitive, over 55 year olds, retired and those with no children at home).

Key findings: Design Choices

Q's 9&10 Designs which meet current lifestyle needs



Q's 9&10 Which of the three photographs match lifestyle needs now and in 10 year's time? (n=600, ONLINE)



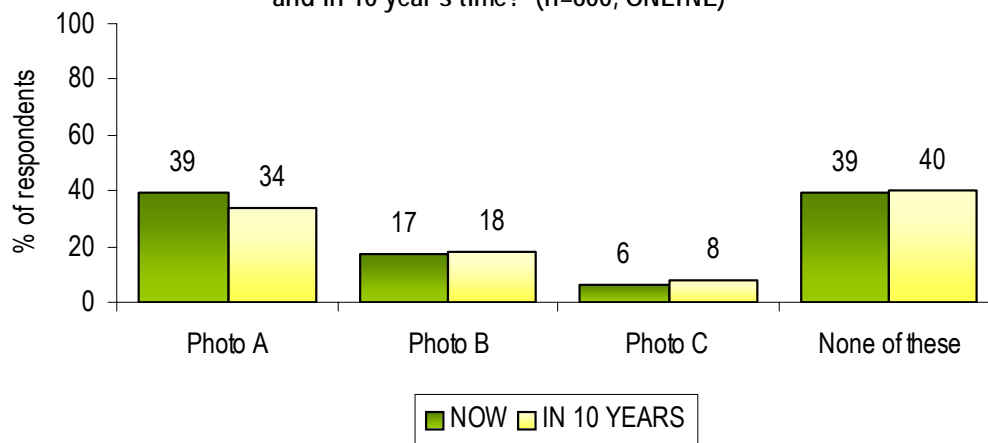
- Those who have bought a home in the last 5 years, live in a villa, unit or townhouse and are under 35 years, were more likely to find Building B would suit their lifestyle needs currently.
- The findings changed only marginally when asked about which design would best suit their lifestyle needs in 10 year's time.

- Respondents were shown a series of photographs showing various built form designs (external views only) of medium and high density dwellings, in sets of three (A-C, left to right). They were asked to indicate which of each set of three they thought matched their current lifestyle and their assumed lifestyle in 10 year's time. They had the option to indicate that none of the three designs would meet their current or future lifestyle.
- Almost a third perceived that none of the three designs shown above would meet their lifestyle needs.
- By a relatively narrow margin, the 3 storey walk-up on the right was the design which met the needs of almost a third of respondents. This design had greater appeal among older respondents (55+) and "empty nest" households.
- The City high rise was least appealing at the total sample level but was more attractive to under 35 year olds, private renters and lone / group households.

Q's 11&12 Designs which meet current lifestyle needs



Q's 11&12 Which of the three photographs match lifestyle needs now and in 10 year's time? (n=600, ONLINE)



- A relatively high proportion thought none of these designs would suit their lifestyle now or in the future. These respondents tended to be living in a detached house, with no experience of higher density living, Australian, with modest income and education, and have lived in the same house for many years and intend to remain.

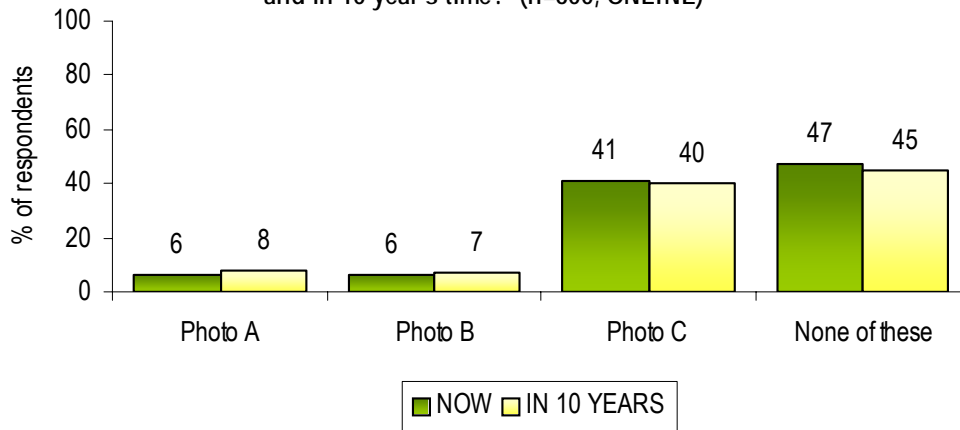
- Nearly 2 in 5 respondents chose Building A as the design which would best meet their current lifestyle, the same proportion who indicated that none of these would suit their lifestyle. This design was most appealing to those currently living in a villa, unit or townhouse, have lived in higher density previously, purchased in the last 5 years and are well educated.
- Building B was more appealing among those who expect to pay \$400,000 or more purchase price, \$400 per week or more in rent and are currently living with parents (a finding which suggests high aspirations or is a contradiction).
- Building C had low appeal across most groups, although single males in lone / group households were slightly more likely to find this design would meet their lifestyle needs.

Q's 13&14 Designs which meet current lifestyle needs

70



Q's 13&14 Which of the three photographs match lifestyle needs now and in 10 year's time? (n=600, ONLINE)



- Similarly, Building B was more likely to meet the current lifestyle needs of well educated young couples with no children, who have experienced higher density living interstate or overseas, and are private renters expecting to pay \$400 per week or more. Again, they did not show particular interest in this type of dwelling in 10 year's time.

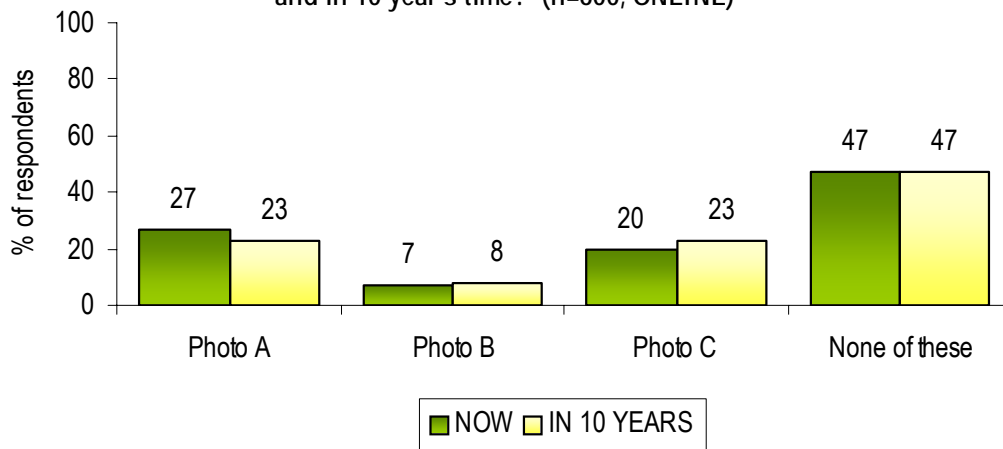
- Almost half of respondents thought none of these designs would meet their current lifestyle needs.
- However, 2 in 5 found the 2 storey townhouses (Building C) appealing both now and in 10 year's time. More than half of those currently living in a villa, unit or townhouse, renting and not intending to purchase a home within 10 years indicated that Building C would meet their lifestyle needs. This finding suggests that this type of development is more likely to attract renters than purchasers.
- Both Building A and B lacked support in terms of meeting lifestyle needs. Having said this, males, under 35 year olds and those in lone / group households indicated Building A would suit their current lifestyle needs but saw this accommodation as transitional and did not favour this type of dwelling in 10 year's time.

Q's 15&16 Designs which meet current lifestyle needs

71



Q's 15&16 Which of the three photographs match lifestyle needs now and in 10 year's time? (n=600, ONLINE)



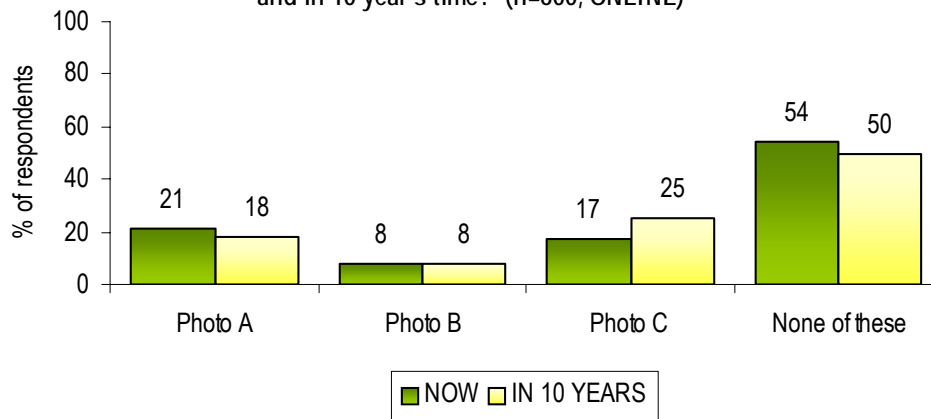
- Building C was more likely to meet the current lifestyle needs of: private renters currently living in a villa, unit or townhouse of 1 or 2 storeys, single or group households and with a relatively low household income. They also perceived they would be living in this type of dwelling in 10 year's time.

- Again, almost half of respondents thought none of these designs would meet their current or future lifestyle needs. However, the profile of respondents most likely to say this is: living in a detached house, with children, never experienced higher density previously, aged between 35 and 54 years.
- By a slight margin, Building A was most likely to suit the current lifestyle needs of respondents, although in terms of future needs both A and C shared equal appeal.
- The profile who chose Building A was: well educated young couples with no children, who have experienced higher density living interstate or overseas, and either private renters expecting to pay \$400 per week or more or purchasers anticipating spending \$400,000 or more.
- Building B met the lifestyle needs of a much smaller segment, who were more likely to be under 35 years, in a lone / group household and unemployed (or students).

Q's 17&18 Designs which meet current lifestyle needs



Q's 17&18 Which of the three photographs match lifestyle needs now and in 10 year's time? (n=600, ONLINE)



- More than half of all respondents indicated that none of these designs would suit their current lifestyle needs, declining slightly to 50% for meeting their lifestyle needs in 10 year's time. High proportions of those who: live in a detached house as an owner/occupier, no intention of moving in the next 10 years, never experienced higher density previously, and retired older couples with no children at home, indicated these designs would not suit them.
- Building A would meet the lifestyle needs of 1 in 5 respondents, with those living in a villa, unit or townhouse, private renters, lone / group households and non-Australian backgrounds being most likely to nominate this dwelling.
- Building B had nominal support from respondents.
- About 1 in 6 respondents thought Building C would meet their lifestyle needs, increasing to 1 in 4 for future lifestyle. There was no indication of a profile among those who thought Building C would meet their current lifestyle needs.

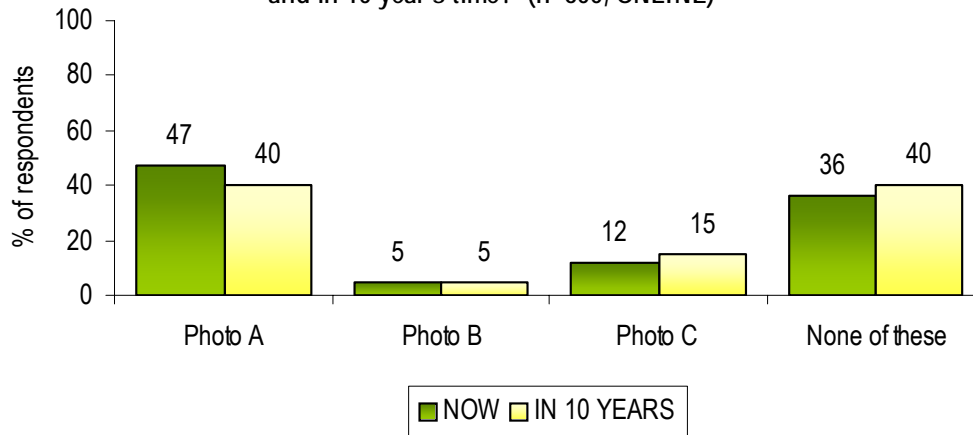
- Having said this, those who are under 35 years now, and those nominating a moderate price range (\$250,000 to <\$400,000) were slightly more likely to perceive that Building C would meet their lifestyle needs in 10 year's time. This finding indicates that the primary market for this type of 4 or 5 storey high density, with communal gardens, might be young families with currently modest incomes.

Q's 19&20 Designs which meet current lifestyle needs

73



Q's 19&20 Which of the three photographs match lifestyle needs now and in 10 year's time? (n=600, ONLINE)



- More than a third of respondents did not see any of these three designs as meeting their current or future lifestyle needs. In general this sub-group tended to be long-term owner/occupiers in a detached house, never lived in higher density, and leaning slightly towards the lower scale of rent (<\$250 per week).

- Almost half of respondents thought that Building A was most likely to suit their current lifestyle needs, declining to 40% in 10 year's time. Most likely to nominate Building A to meet their current lifestyle needs were: those living in a villa, unit or townhouse of 1 or 2 storeys, single or group households, private renters and not intending to purchase in the next 10 years, or whose price range if they purchased would be under \$250,000.
- Building B was a design perceived as not meeting most respondents' lifestyle needs, either now or in the future.
- Just over 1 in 10 respondents thought Building C would meet their currently lifestyle needs, increasing marginally to 1 in 7 in 10 year's time. The profile included: those living in a villa, unit or townhouse of 1 or 2 storeys, under 35 year olds and those in lone / group households.



Choice Modeling

(Choice-based conjoint analysis)



- Choice modelling based on choice-based conjoint analysis is designed to investigate what buyers would actually do or behave in given scenarios. Choosing a preferred product, in our case a house, from a group of products is a simple and natural task that anyone can understand. The importance of the choice modelling methodology is that unlike prompted or unprompted questions, it puts the respondent in slightly changing situations where they, somewhat subconsciously, need to choose a product depending on how they weigh given factors.
 - Online research respondents were asked to imagine they were looking for new accommodation to buy or rent for personal use. On each screen they were presented with three accommodation options, with different levels of alternatives. The model excluded factors such as costs, timing and suburb etc on purpose in order to measure responses that relate to lifestyle.
 - Technical explanation: Balanced overlap task generation method was utilised using a seed of 1 based on 300 versions with 12 random tasks, 7 attributes, and 3 levels in each attribute. In other words, 12 random tasks per 300 versions of total choice tasks resulted in a total of 3600 choice tasks, completed by all respondents. 'None' option was not included in the design in order to focus the attention on the slight differences that a person would think might affect lifestyle. Outcomes are presented based on 'counting' analysis. 'Logit' analysis was also utilised in order to double check and test the reliability and consistency of outcomes. These technical specifications led to optimal efficiency of the design (0.99 and above), and highly reliable results. Below is the list of attributes and levels:
- | | |
|--|--|
| <ul style="list-style-type: none">▪ Building form<ul style="list-style-type: none">~ Single storey detached~ Two storey, semi-detached terrace house~ Private flat, 4 to 5 storey block, less than 30 flats in the complex▪ Size<ul style="list-style-type: none">~ Large room size, 1 bedroom~ 3-4 bedrooms~ Modest size 2 bedrooms with balcony▪ Proximity to work and services<ul style="list-style-type: none">~ 15 minutes to work, schools, parks and basic services/shops~ 30 minutes to work. Schools, parks and basic services/shops short drive away~ 45-60 minutes to work. Schools, parks and basic services/shops not within walking distance. | <ul style="list-style-type: none">▪ Proximity to public transport<ul style="list-style-type: none">~ Close to public transport~ Not close to public transport, need car(s)~ Several options for travel, own car, public transport or off-road cycling▪ Proximity to the City<ul style="list-style-type: none">~ Inner suburbs, close to the City~ Suburbs, moderate distance to the City~ Outer fringe, relatively far from the City▪ Views<ul style="list-style-type: none">~ Limited views of surroundings~ Streetscape and local playground~ Good views from balcony▪ Open space<ul style="list-style-type: none">~ Enclosed back and front gardens~ Small private courtyard but no private front garden~ No private open space but park short walk away |
|--|--|



Choice Modeling

(Choice-based conjoint analysis)



- Below is an example of a task as appeared to an online respondent. These tasks are considered natural as they mimic the actual buying process. By observing how participants chose in response to changes in the underlying attributes, choice modelling allowed us to estimate the impact (utility/relative importance) of each attribute level has upon overall housing preferences.
- Participants required to indicate which of the three options presented they would be most likely to choose, then on the next screen, they were presented with a new range of options. Please note that the following example is only one of the 3600 versions.

If you were looking for new housing today and these were your only options, which would you choose? Each scenario is slightly different from the previous ones you have seen. Choose by clicking one of the buttons below:

Building form

Single storey detached house

Single storey detached house

Private flat, 4 to 5 storey block, less than 30 flats in the complex

Size

3-4 bedrooms

Large room size, 1 bedroom

Modest size 2 bedrooms with balcony

Proximity to work and services

15 minutes to work, schools, parks and basic services/shops

30 minutes to work. Schools, parks and basic services/shops short drive away

45-60 minutes to work. Schools, parks and basic services/shops not within walking distance.

Proximity to public transport

Not close to public transport, need car(s)

Several options for travel, own car, public transport or off-road cycling

Close to public transport

Proximity to the City

Suburbs, moderate distance to the City

Inner suburbs, close to the City

Inner suburbs, close to the City

Views

Streetscape and local playground

Limited views of surroundings

Limited views of surroundings

Open space

Small private courtyard but no private front garden

No private open space but park short walk away

Enclosed back and front gardens



Choice Modeling: Relative Importance



A person /
household intends
to buy/rent a
house

Number and size
of rooms
27%

Building form
25%

Open space
14%

Proximity to work
and services
(30 minute living)
12%

Proximity to
public transport
11%

Proximity
to the City
7%

Views
3%

Other factors not in
the model such as
cost, timing, suburb
etc.

Move in!



- The results clearly suggest that, when the respondents were asked to imagine they were in the market to buy or rent a house, the relative importance of the number and size of rooms (27%) and building form (25%) outweighed all other attributes.
- The results present significantly lower relative importance figures for other factors. The two key factors were followed by:
 - ~ open space (14%).
 - ~ proximity to work and services including schools and shops (12%).
 - ~ proximity to public transport (11%).
 - ~ proximity to the City (7%).
 - ~ and views (3%).
- It is important to understand that these figures show the relative importance or utility of each attribute. However, some levels within each attribute contribute to these relative importance figures more than others. In other words, relationships between levels within each attribute and how they influence overall relative importance needed to be analysed next.

- When relationships between the levels within each attribute are analysed, all attributes present significant relationships between levels:
 - ~ In terms of building form, 'single storey detached houses' were by far the most popular building forms, having been selected 45.7% of the times they occurred (appeared on the screen in a task). This preference is double the 20.6% selection of 'private flat, 4 to 5 storey block, less than 30 flats in the complex'. This result clearly suggests that the respondents from metropolitan Adelaide significantly more likely to be in the market for single storey detached houses. However, it is important to note that 'two-storey semi-detached terrace houses' were selected 33.7% of the times they occurred, suggesting a potential for such building forms.
 - ~ In terms of the size and number of rooms, clearly, '3-4 bedrooms' was the main choice by (45.5%), followed by 'modest size 2 bedrooms with balcony' (35.6%) and 'large room size, 1 bedroom' (18.8%). This suggests that the number of rooms was found to be the key factor influencing the decisions of respondents, even more so than the size of rooms.
 - ~ These 2 key factors were followed by open space. 'Enclosed back and front gardens' was by far the most selected choice by 40.3%, followed by 33.6% for 'small private courtyard but no private front garden' and 26.1% for 'no private open space but park short walk away'.
 - ~ In terms of proximity to work and services including schools and shops, it is interesting to see that both the '15 minutes to work and...' and '30 minutes to work...' levels were selected very close to each other, by 37.9% and 35.6%, respectively. The results drop down to 26.4% for '45-60 minutes to work. Schools, parks and basic services/shops not within walking distance'. This suggests that the 15-30 minute window of proximity to work and lifestyle is a key factor that needs to be taken into consideration for Transit Oriented Developments.
 - ~ In terms of proximity to public transport, the level 'not close to public transport, need car(s)' was selected the least when it appeared on the screen by 25.8%. The levels 'close to public transport' (37%) and 'several options for travel, own car, public transport or off-road cycling' (37.2%) were received similarly. Interestingly, this suggests that having various options to travel is at least as important as closeness to public transport.
 - ~ In terms of proximity to the City, although it is important to note that the figure for outer fringe is 29.9% and lower than the figures for inner suburbs (36.5%) and suburbs within moderate distance (33.7%), the difference between these levels are not as great as differences noted in other attributes. These explain the low 11% relative importance figure given to the proximity to the City suggesting that when a person goes in the market to buy or rent a house, the attributes analysed before clearly outweigh proximity to the City.

Relationships Between Factors (cont.)

- The same perspective is valid for views as well, the proportions of the times they were selected by the respondents were very close, 34.3% for good views from balcony, 34.2% for streetscape and local playground and 31.5% for limited views of surroundings. This is why the relative importance of views came up to be the lowest among all attributes by only 3%.

- It is important to underline that these results are also strongly supported when two-way relationships are taken into consideration. The only significant two-way relationships are for the first 3 most important factors, namely, size and number of rooms, building form and open space. Overall, the analysis of the choice modelling component of the research, based on choice-based conjoint methods, clearly suggest that when a metropolitan Adelaidean goes in the market to buy or rent a house, within the parameters of this research, the most attractive combination of housing option is:

A 3-4 bedroom single storey detached house with enclosed back and front gardens, which is 15 to 30 minutes to work, schools and basic services/shops. These key factors that affect the housing decision would be complemented by other factors to a lesser extent.

- In other words, these discrete choices of the respondents indicate that proximity to public transport, the City and views would affect their choices only after they take into account relatively more importance factors. For example, if a person finds several houses that qualify for the main factors, then s/he would start eliminating houses by relatively less important factors such as proximity to public transport, the City or views.



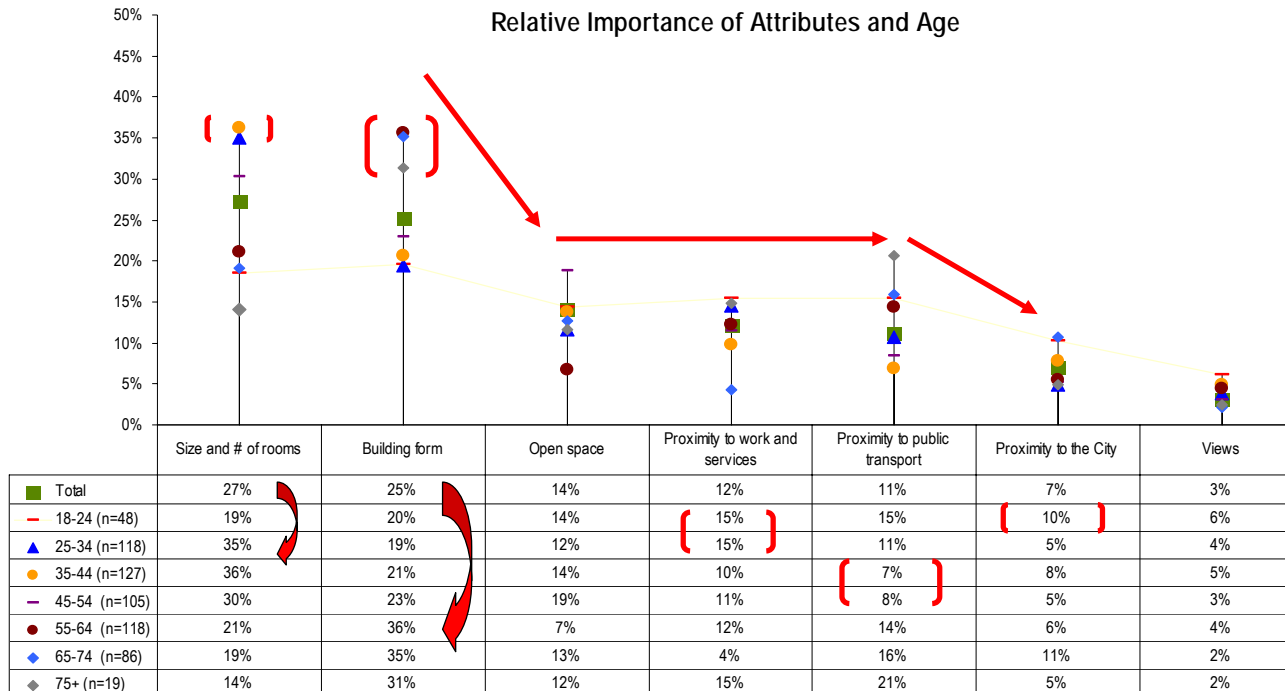


Choice Modeling

Relative Importance by Age

- The chart below analyses the relative importance figures by age segments. The green box represents relative importance at the total sample level and the subsequent symbols represent the respective age segments. This segmentation of the choice modelling results clearly depicted two key results:
 - the two most important factors, namely, size/number of rooms and building form, were subject to significant fluctuations as people age.
 - The choices of the 35-44 and 45-54 age segment presented indicative differences, most probably due to their lifestyles and different needs.
- The 19% relative importance figure given to size/number of rooms by 18 to 24 year olds presented significant increases in 25-34 and 35-44 age segments. This evidently suggests that attraction to a house is strongly affected by the middle life stage, when, for example, people establish families and have/raise children.

Relative Importance of Attributes and Age



• It also explains why 35-44 and 45-54 year olds gave only 7% and 8%, respectively, to the importance of the proximity to public transport, as they become increasingly more car dependent in such stages of their lives, thereby rating the importance of the proximity to work and services higher than other age groups.

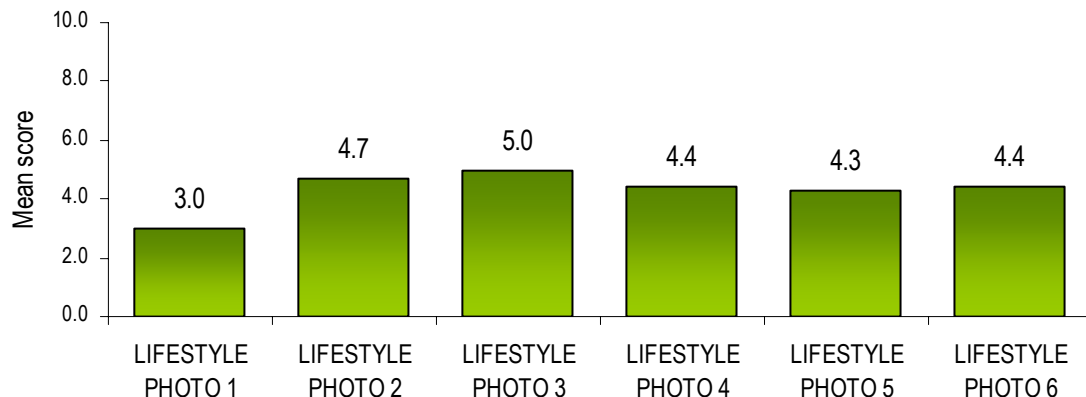
• The 20% relative importance figure given to building form by 18-24 year olds presented steady increases as people age. This, in turn, suggests that the high preference of single detached housing is most apparent for older segments and the likelihood of buying/renting units or living in high storey buildings is significantly higher for younger segments.

Key findings: Lifestyle Choices

Q's 33-38 Suitability of TOD Lifestyle

Q's 33-38 Suitability to lifestyle (n=600, ONLINE)

(0-10 scale, where 0 = not at all close, 10 = spot on)



- Six photographs demonstrating different elements of the community and infrastructure surrounding Transit Oriented Developments were shown to respondents (separately).
- Respondents were asked to rate each one according to how closely they believed each example suited their lifestyle, using a 0 to 10 scale where 0 is not at all close and 10 is spot on.

- The graph shows the overall ratings, demonstrating that ratings varied from a low of 3.0 up to a high of 5.0.
- The following pages analyse each of the outcomes separately and, where applicable, highlights the profile of segments who were more likely to perceive the lifestyle shown as being suitable for them.



Q's 33-38 Suitability of TOD Lifestyle



- With a mean score of 3.0 (out of a possible 10.0), there was low suitability of this lifestyle for respondents, with 1 in 5 (21%) perceiving that the high density housing and small business mix, with the tram line and pedestrian and bicycle friendly road would be suitable for their lifestyle.
- The profile of those who showed significantly higher proportions stating this lifestyle was suitable were: under 35 year olds, those in a villa, unit or townhouse now, those contemplating purchasing within 10 years, those who are well educated, have experience living in high density interstate or overseas and anticipating spending \$400,000 or more to purchase a home.



- With a mean score of 4.7 (out of a possible 10.0), the lifestyle scene shown alongside gained the second highest score for suitability for respondents, with more than 2 in 5 (44%) perceiving that the high density housing and tree-lined, pedestrian friendly walkway / recreation area would be suitable for their lifestyle.
- The profile of those who showed significantly higher proportions stating this lifestyle was suitable were: under 35 year olds, those in a villa, unit or townhouse now, those living at home with parents, well educated, contemplating purchasing within 10 years and anticipate spending \$400,000 or more to purchase a home.

Q's 33-38 Suitability of TOD Lifestyle



- With a mean score of 5.0 (out of a possible 10.0), this lifestyle was the one which rated highest overall for suitability, with nearly half (47%) perceiving that the medium high density housing and café lifestyle, with the lake views and pedestrian and bicycle friendly paths would be suitable for their lifestyle.
- The profile of those who showed significantly higher proportions stating this lifestyle was suitable were almost identical to that identified in previous lifestyle pictures. That is: under 35 year olds, living in a villa, unit or townhouse now, those living with parents currently, contemplating purchasing within 10 years and anticipate spending \$400,000 or more to purchase a home.



- With a mean score of 4.4 (out of a possible 10.0), the lifestyle scene shown alongside was perceived by more than 1 in 3 (38%) as suitable for their lifestyle.
- The profile of those who showed significantly higher proportions stating this lifestyle was suitable showed a similar pattern to other lifestyle views. Those under 35 years, those in a villa, unit or townhouse now or living at home with parents, contemplating purchasing within 10 years and have previously experienced high density living either interstate or overseas.

Q's 33-38 Suitability of TOD Lifestyle



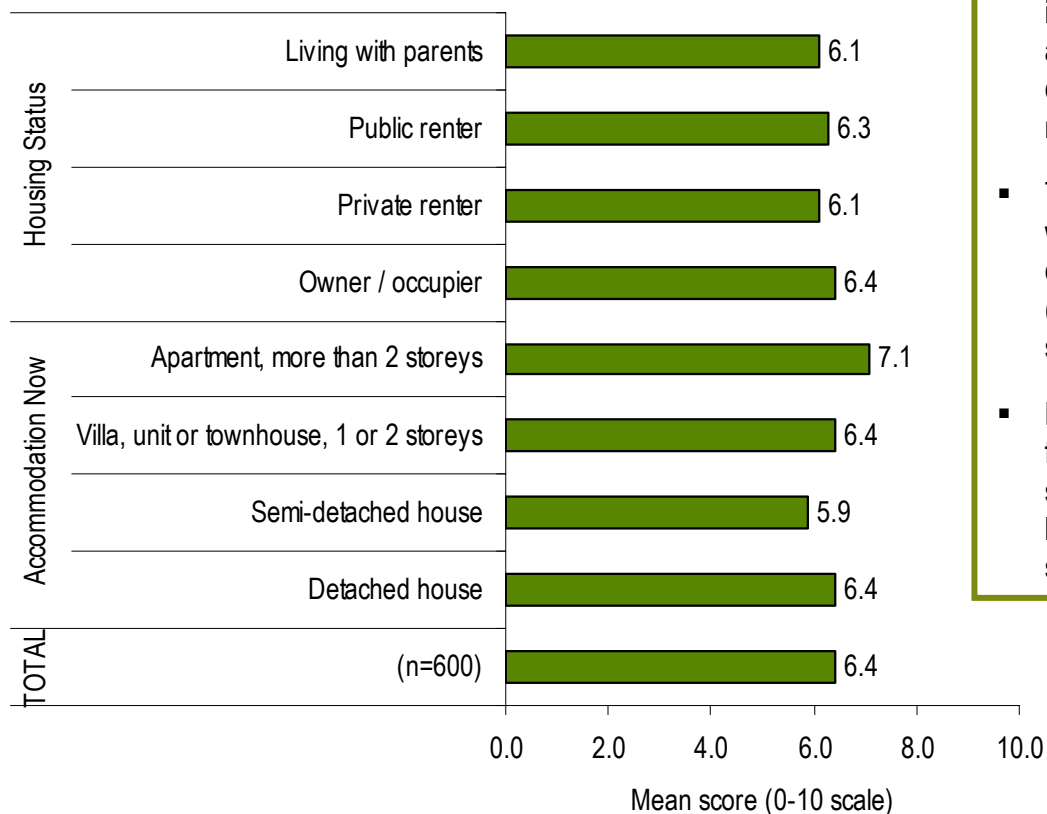
- The artist's impression of the Bowden redevelopment was rated at a mean score of 4.3 (out of a possible 10.0), with more than 1 in 3 (36%) respondents rating the suitability at 6 or more out of 10.
- Again, the profile of those who showed significantly higher proportions stating this lifestyle was suitable was almost identical to that identified in previous lifestyle pictures. That is, those: under 35 years, living in a villa, unit or townhouse now, those living with parents currently, those contemplating purchasing within 10 years and anticipate spending \$400,000 or more to purchase a home. In addition, a significantly high proportion live in a household where the annual income is \$150,000 or higher.



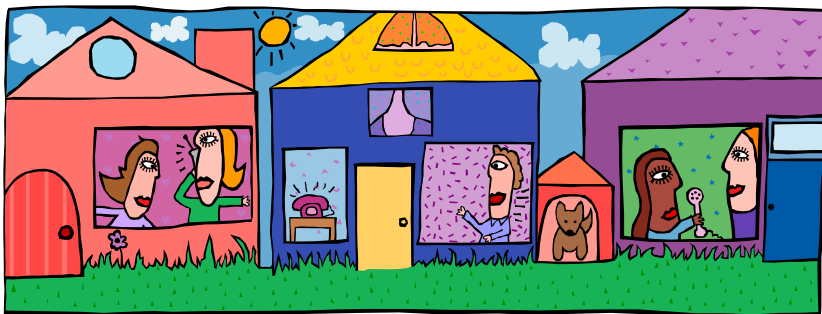
- With a mean score of 4.4, the lifestyle scene shown alongside was perceived by more than 1 in 3 (38%) as being suitable for their lifestyle.
- The profile of those who showed significantly higher proportions stating this lifestyle was suitable was similar to other lifestyle views, but not identical. The profile included: well educated, under 35 years and anticipate spending \$400 per week or more on rent. However, these were the only statistically significant differences.
- What was notable, however, was a quite high incidence of those 55 years and older (1 in 5) rating the suitability of this lifestyle at zero. From comments made, the main barrier is the 5 or 6 storeys and perceived difficulty of getting up or down with health or age-related disabilities.

Q39 Importance of sense of community

Q39 IMPORTANCE OF SENSE OF COMMUNITY WHERE LIVE
(BASE: n=600, ONLINE)



- With a mean score of 6.4, a sense of community is relatively important. 2 in every 3 (66%) respondents rated this aspect at 6 or more out of 10 (versus 19% rating sense of community at 4 or less out of 10 and 15% remaining neutral).
- There was little variation in rating this as important or not when analysed by the type of accommodation they are currently living in and whether or not they own or are renting (the minor differences shown on the graph are not statistically significant).
- Perhaps understandably, full-time employment was the only factor to significantly influence the perceived importance of a sense of community. Those who work full-time were less likely to rate this aspect as important (5.9 mean score, statistically significant at the 95% confidence interval).

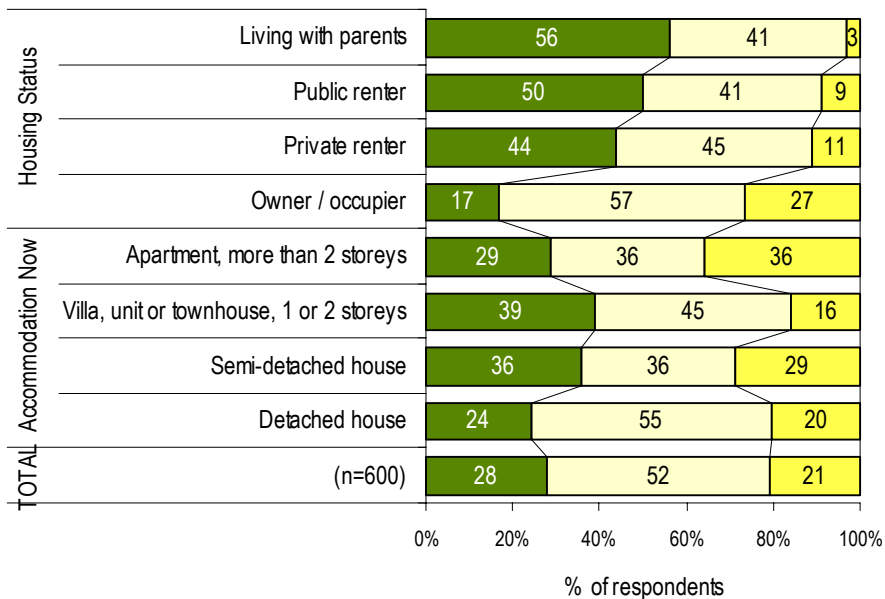


Key findings: Price Points

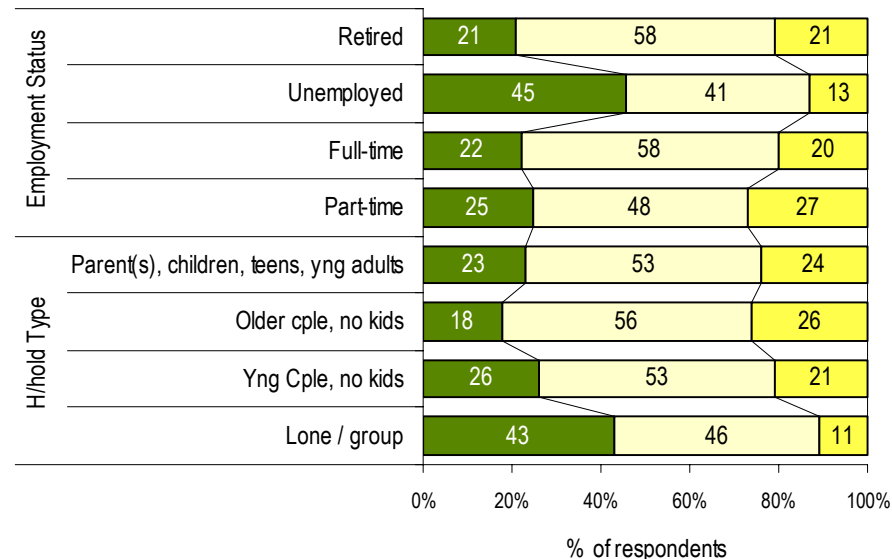
Q40 Purchase price range

- Half (52%) of all respondents indicated their purchase price range would be between \$250,000 and \$400,000, with just 1 in 5 (21%) anticipating spending more than \$400,000 on a suitable higher density house and 28% stating their price range would be under \$250,000.
- Not surprisingly, perceptions of what they would be prepared to spend on purchasing a higher density dwelling which suited their lifestyle was strongly associated with socio-economic status. For example, those currently renting (both privately or public housing) or living at home were significantly more likely to nominate under \$250,000 purchase price whereas those who bought a home in the last 5 years were more likely to suggest over \$400,000. On the other hand, those with a household income of \$100,000 or more were significantly more likely to nominate a price of \$400,000 or more.
- A relatively high proportion (39%) of those currently living in a villa, unit or townhouse of 1 or 2 storeys nominated a price range of less than \$250,000. This finding seems to suggest that higher density is perceived as a low cost option and that most of those contemplating this type of accommodation are price sensitive.
- The age of respondents had little impact on their perception of price range, with one exception. Respondents aged 55 to 64 years showed a slightly higher incidence (27%) of stating their price range would be \$400,000 or more for a suitable higher density dwelling.

Q40 PRICE POINTS - PURCHASE



Q40 PRICE POINTS - PURCHASE



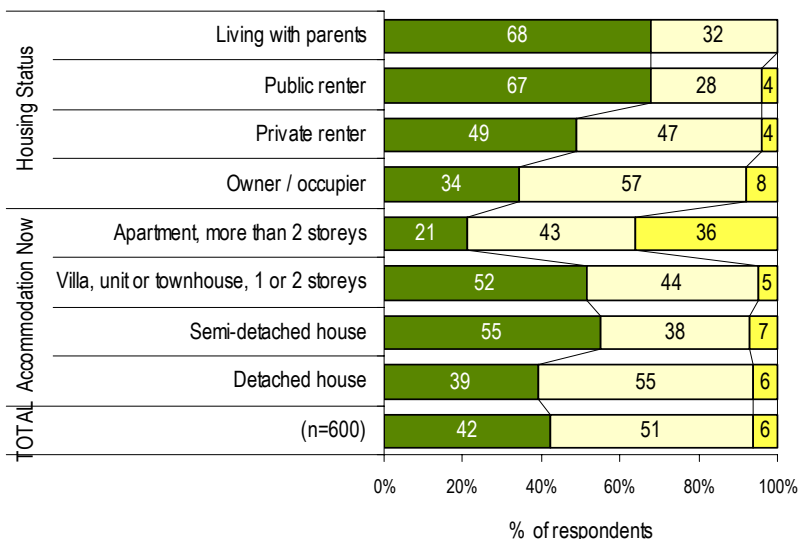
Under \$250,000 \$250,000 to under \$400,000 \$400,000 or more

Under \$250,000 \$250,000 to under \$400,000 \$400,000 or more

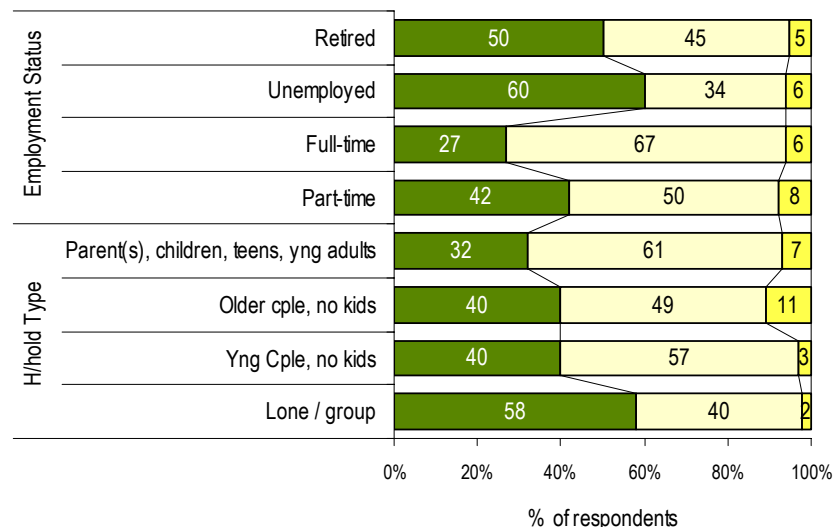
Q41 Rental price range

- A similar pattern was noted when it came to rental price range. Half (51%) of all respondents indicated their price range to be between \$250 and <\$400 per week, with just 6% anticipating spending more than \$400 per week rent on a suitable higher density house and 42% stating their price range would be under \$250 in weekly rent.
- As with purchase price, perceptions of what they would be prepared to spend on rent for a higher density dwelling which suited their lifestyle was strongly associated with socio-economic status. For example, those currently renting public housing or living at home were significantly more likely to nominate under \$250 per week in rent. However, those who are currently renting privately were evenly divided between <\$250 per week and between \$250 and <\$400 in weekly rent (49% and 47% respectively).
- A slightly high proportion (52%) of those currently living in a villa, unit or townhouse of 1 or 2 storeys nominated rent of less than \$250 per week. This seems to support the finding reported regarding purchase price, that is that higher density is perceived as a low cost option and that most of those contemplating this type of accommodation are price sensitive. Among those who do not own a home and do not contemplate owning one in the foreseeable future, 8 out of 10 (81%) said their price range for rent would be under \$250 per week.
- Families with children showed a high incidence (61%) of nominating a rent of between \$250 and <\$400 per week. Households with mature couples, no children at home were the only family type to show a relatively high incidence of citing a price range of over \$400 per week (11%).

Q41 PRICE POINTS - RENTAL



Q41 PRICE POINTS - RENTAL



Under \$250 p/wk

\$250 to <\$400 p/wk

\$400 or more p/wk

Under \$250 p/wk

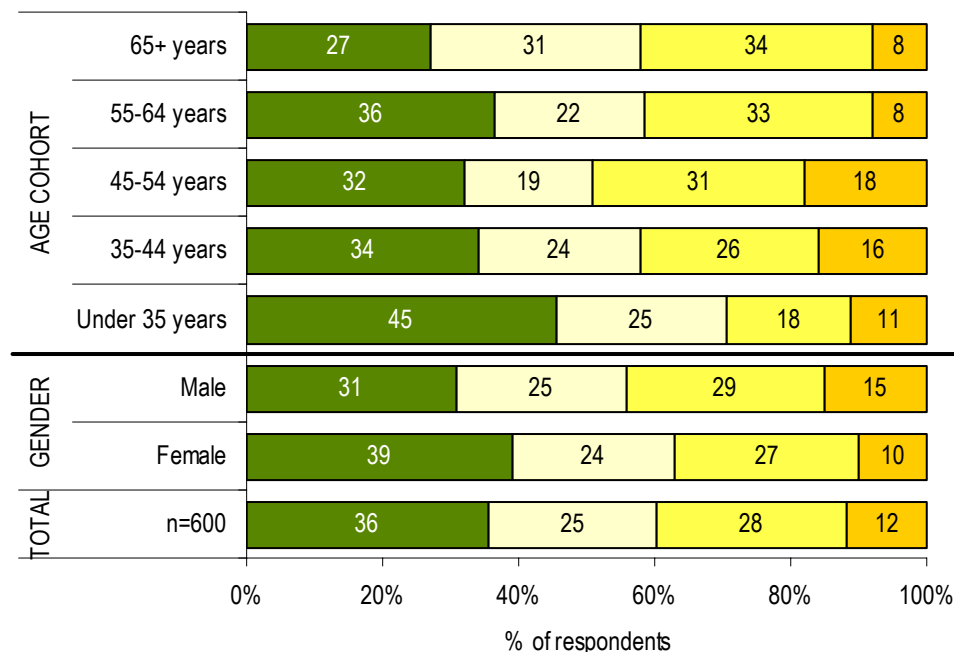
\$250 to <\$400 p/wk

\$400 or more p/wk

Key findings: Further comments / suggestions

- Nearly two thirds (64%) of all respondents indicated they would like at least some ongoing information about further developments in higher density TOD's. This is a positive outcome, suggesting that there is considerable interest in the concept and the community wish to be at least informed, if not involved, in its development.
- Of these, 25% would like information through normal media, 28% would like information via a website or email updates and 12% would like active participation such as workshops and community engagement.
- However, a primary target group of higher density developments might include those under 35 years, young couples with no children, and those not currently in the workforce (includes students). These segments each showed relatively high incidences of stating they wanted no further involvement in information about TOD's.

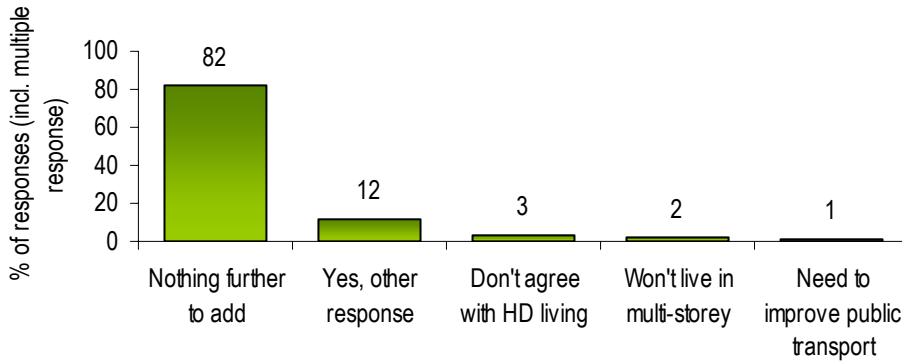
Q42 EXTENT WOULD LIKE TO BE KEPT INFORMED ABOUT TOD's AND ROAD CORRIDOR DEVELOPMENTS



- No further involvement
- Information via commercial and local media only
- Information via a website or email updates
- Active participation - workshops, community engagement

Q43 Further comments / suggestions regarding TOD's

Q43 ANYTHING FURTHER REGARDING TOD'S AND HIGHER DENSITY DEVELOPMENT - UNPROMPTED



- The overwhelming majority of respondents had no further comments regarding TOD's and higher density development.
- The "word cloud" diagram below demonstrates the main themes mentioned by the 12% of respondents who put forward individual responses. The most common theme is centred around "good" public transport, as has been noted throughout this report.



Section 4: Group Discussions

The following analysis of the four group discussions has been organised by topic, but also segments the responses into age cohorts to highlight any variations in housing choices needs and wants by family and life-stage.

Key issues in choosing a home

- Confirming the findings of the choice modelling, participants in the under 30 age cohort, said the single most important issue when choosing a home was the size, in terms of both the size of the house and the size of the property. These two factors were equally important to young buyers as they can change the house size to meet growing family needs, but cannot increase the land size without purchasing elsewhere (probably on the fringes).

"The size of the house and the size of the property it is on, are more important to me than the location."

"Big enough to fit children and I am probably more interested in the size of the land than the size of the house."
- Even participants who do not have children wanted a big back yard, mostly to allow dogs to have room. A backyard, however, is intrinsically linked to families with children and is also perceived as essential for entertaining, as it keeps guests outside thereby protecting the inside of the home from potential damage as well as avoiding social discomfort.
- Location was a secondary issue, with proximity to the City not as important as being near to the beach *"I don't want to live in a derelict area, but a nice quiet suburb near the beach and near shops and cafes"*. Having said this, when asked what they liked most about where they live now, overwhelmingly the proximity to a range of services including schools, shops and social networks was the most often mentioned aspect – *"nothing is too far away"*. This confirms the 15 to 30 minute lifestyle as being a highly desirable aspect of where people live.
- Generally, younger participants did not consider the neighbourhood when buying or renting for the first time. Their decisions were based on the suitability of the built form (e.g. size, # of b/rooms, amenity of kitchen, # of bathrooms etc) and the size of the open space, then distance to work and social networks. Neighbourhood becomes more important later when they want to start a family and the need to access services and facilities to support the family.
- Young families were strongly influenced by proximity to a 'good' school, so transit and road corridor developments which are located near to quality public schools will attract some families. This is based on the premise that the design of the medium density housing would suit a family, including aspects such as 3 to 4 bedrooms, affordable but not cheap, an enclosed play area and a maximum of about 4 to 5 storeys. The medium level is essential for being able to supervise younger children while they are playing in the enclosed play area without having to always be with them as they would if it were a neighbourhood playground.
- The 30 to 44 cohort were slightly less likely to cite size of home / land and location and more likely to be influenced by more esoteric "feeling" about the house as being the right one.

"My wife and I walked into the house and said 'this one feels right', it had a sense of home. Is it in the right location or the right street didn't come into it."

Key issues in choosing a home

- Having said this, size of the back garden among this segment (young to middle family life-stage) was important, particularly for entertaining but also to provide sufficient enclosed space for at least one dog. This age group were more likely to have a dog and a yard to run in and high fences to keep the dog in were essential. None of this age segment could perceive of keeping a dog in medium density housing where no private open space was available. In addition, a dog is valued as a security measure and this was particularly important to single females living alone: *"I bought my dog not only because I had always had them growing up but for security, being a single woman it is important to have a dog for security"*. This factor must be considered when designing liveable communities, as single person households are an expanding population segment and likely to be a prime market for medium density (ABS reports single person households as the fastest growing household type).
- This group showed a high incidence of having made use of the new build home owner's grant to design and build their own home. This gave them flexibility to influence the design to get the features and size they wanted, whilst still being affordable.
"The building grant gave me extra money so that the cost was similar to an established place but I got the special features I wanted rather than trying to recreate it from something else."
- Being near to public transport was not a strong motivator in choice of location, but it does tend to increase in importance as the family matures (a finding also noted in the phone survey). One sole parent noted that her daughter was forced to move out of home earlier than desirable because of the lack of frequent public transport in their area to be able to access a wide range of employment opportunities. Without private transport, housing choices change focus slightly to include access to public transport or location within walking or bicycle ride distance. For obvious reasons, access to public transport was also more important for older participants (especially those who are retired).

Affordability issues

- Among the under 30 cohort, most were either renting currently, living at home or had recently purchased their first home. Affordability was a major factor in home ownership for first home buyers and renters, but considerably less important to those who were still living at home.

- When discussing what they thought was the typical Australian home, comments tended to focus on issues of affordability and the perception that the traditional house on a large block was affordable for previous generations but is no longer affordable for 'average' earners. This aspiration to have a large home on a large block drives demand for fringe development. They want 'more house for their buck' and are willing to move further out to get it.

"I would have to be on a super big income to afford what my parents could afford".

"I think the prices per house will be quite similar, but you will get half the land than was usual in the past."

"Affordability is a really big thing with people I know, everything else comes in second."

"A friend of mine wanted a big house and ended up building a beautiful big home at Gawler because that was all she could afford. The home was more important to her than the location."

- Also in terms of affordability, another generational change is that some younger people aspiring to purchase their first home take the view that the first house they purchase is to "get into the housing market".

"We knew that the first house we bought was to get into the market, it was never going to be our long term home. Over the next 10 years we worked out the best way we could realise the equity to get closer to the home we ultimately wanted."

- This cohort were more likely to have embraced the concept of urban consolidation in the form of sub-division.

"People put up with much smaller homes and much smaller blocks now."

"They adapt and have somewhere to live that ticks most of the boxes."

- Having said this, their perceptions of the lived experience of high density in other parts of the world demonstrated the enormity of the perceptual barrier that exists regarding high density. A perceived link between high density and low socio-economic housing was most clearly articulated by young participants, as the following quotes demonstrate:

"It is challenging the Australian way of life, which is different to high density housing."

"Like in England, the images on The Bill show the estates as all being terrible, criminal people living there. If that was in Adelaide, you would only move there if you were going to break into the shop down the road."

- Interestingly, younger participants were less likely to express concern about the ongoing affordability of resources, such as energy and water costs, associated with living in a large detached house on its own block. This was particularly notable when compared with those in the mature family or 'empty nest' life-stages, who were more likely to mention strategies such as using their private car less, installing solar power and energy efficient design. Affordability was the key motivator for their interest in sustainability in this cohort, although concern for the environment was also an important factor.

Future vision

- The increasing emphasis on the size of the built form is closely associated with generational changes to lifestyle, such as more time spent in front of screens of varying kinds, the need for larger bedrooms to accommodate desks and computers, the need for a separate study for one or more parents to undertake work at home, more informal entertaining so less likely to want a separate dining room or formal lounge but greater value placed on linking the outdoors areas with internal space. These factors traversed all life-stages until the “empty nest” stage, when maintenance and upkeep become more onerous and space is less important than quality of life.
- The size of the bedrooms has taken on greater importance over time, as well as with increasing internal space needs as families mature. When contemplating purchase of a home, bedroom size is reportedly just as important as having sufficient space in the common areas of the house. *“Tiny bedrooms wouldn’t have mattered in the 1930’s because you just slept in them.”* Whilst this seems to conflict with the desire for a large backyard for younger children to play, this private open space provides the opportunity to either expand the house to meet the family’s growing needs and the need for privacy among teenagers and young adults, or to build a small, stand-alone structure which can be utilised according to need (e.g. teenagers, work shop / shed or as a work space for parents switching to working from home). Thus, flexibility of design and space afforded by the single detached house on its own block is a significant factor as families grow and their needs change. In order to accommodate these changing needs in a medium to high density setting, some fundamental changes in social norm may be required. This might mean a shift in attitude away from having “a family home” to being open to the concept of changing homes as the family’s needs change. Or it may mean providing medium density housing which can be adapted as the family’s needs change (although this seems unlikely in the current context of building materials, planning limitations, limitations on space and so on).
- There were mixed feelings among the under 30 year olds regarding higher density living. Some would cautiously consider medium density but only if it was not *“just a concrete slab”* but thought had gone into the design to alleviate the *“block look”*, and services and open space were incorporated into the design. Later, when looking at some lifestyle designs, the inclusion of mature trees surrounding the built form had a significant impact on their perceptions of the medium density design and on the likelihood that they would live in a building in this type of setting.
“I probably would consider it, depending on if it was done in a smart way, close to things like good education facilities, good health facilities and with common gardens and shared areas.”
“I would be prepared to live in a high density home if I had easy access to large parks and open spaces.”
- On the other hand, they were cautious about living in a neighbourhood with a residential, commercial and industrial mix. Whilst some felt that the noise and “clutter” which goes with this type of mix happens when they are usually at work and is relatively quiet on weekends, others felt that the area would be less appealing.
“If they had trucks coming in and out all day, that would make it less attractive for me.”
“Factories are a bit of an eyesore, anyway. They are not attractive.”
“And workers leave their rubbish behind.”

Future vision

- As mentioned, 30 to 44 year olds were very focused on having a large back garden, although they also tended to be quite critical of what they termed “McMansion’s” and in particular the lack of garden space and the appearance. Their comments provide insight into what housing should not be like for this segment (most of whom had young children).
 - “They are really ugly, little pokey back yards and houses all the same all down the street.”*
 - “Two storey and look fantastic then you walk in the each bedroom is probably the size of a kitchen closet.”*
 - “I think they are unimaginative, they might be new but they don’t have style or pizzazz.”*
 - “There are no trees and the landscaping is mostly rock or fake lawn.”*
 - “They are not kid friendly, they’re set up for adults.”*
- There were also some in this cohort who were unconvinced of the need for significant development in future. Indeed, comments like the following quote typify the attitude of some participants across all groups that there is either no need or no desire for an increase in population and the consequent need for higher density housing - *“I can’t understand why we need a huge boom in growth in population and housing”*.
- Participants in the 45 to 54 age cohort were the first to spontaneously raise the issue of ongoing maintenance and energy costs of their housing. More than half of this group have installed solar panels or either signed or are seriously considering solar energy. In comparison, younger home owners barely raised the issue of ongoing energy costs (except in reference to the energy costs of “others” living in a McMansion).
 - “If I had the opportunity I would have built the right way, with reference to sun and shade and so on. It is good that we are more conscious of the environment when building new houses.”*
- However, a key consideration in purchasing ecologically sound housing for this group was its relative costs compared with installing solar panels on an established house.
 - “If it was within a similar price range, I would consider spending another 10% on top of the purchase price to have everything installed already and the costs will be lower to run that house so you will recoup it many times.”*
- This age cohort were also more likely to indicate that additional rooms were needed over the traditional designs which incorporate combinations of living areas and kitchen / dining with bedrooms. The main purpose was to provide a separate parent study area and was particularly important to those working from home.
 - “We needed 4 bedrooms, one bedroom is my study where I work. I need my space with my computer and internet, while they have their TV, Play Station and whatever in their room.”*
- Interestingly, this group tended to think that house size is directly related to the amount of money banks were willing to loan rather than a conscious decision to buy a larger home: *“With new houses, the money is easier to get and you get access to funds to build big houses.”* and *“Until recently, banks were falling all over themselves to give me money.”* In effect they are saying that if the money isn’t available, the family will make do with what they have.

Future vision

- When asked if they could see themselves in housing other than detached on its own block, some in this middle family segment found this difficult to visualise for themselves although they had no difficulty in conceiving of their children living in medium or even high density housing, particularly if it was near to the City. However, it was considered to be transitory rather than a permanent “home” and had inherent problems such as space and crowding.
“I would hate to see urban consolidation, even duplexes mess up the neighbourhood. That is where I choose to live, where we all have bungalows and blocks of land. But my son would think that was a fabulous idea, living in an apartment in the City.”
“I have no issues with building them in the City. If you want to live there, go for it, but I sure as hell wouldn’t.”
“I have lived in high rise in Greece and they parked on the footpaths there because there is no space. I wouldn’t want that in Adelaide.”
- And some would be very interested in this type of housing for themselves, although they tended to be single with either none or adult children *“I would love to live in an apartment and no garden.”* and *“When I lived in Sydney I lived in an apartment, but I don’t have kids living with me”.*
- Most of this cohort saw potential in the concept, even if they did not wish to live there themselves. *“A mix of housing is a sensible solution.” “At Gilberton, it is a good place to put a high rise, so long as they don’t overdo it and have one after another.”* These comments suggest that density is strongly associated with the built form rather than density of people. It highlights the need to consider the impact of terminology used to describe density. There was considerable discussion about what constituted density and the language used clearly upheld the assertion, in other parts of this report and in other papers, that in general people are confused about density and perceive the term higher density to be directly correlated with high rise and the number of levels.
- In terms of how they perceive Adelaide developing into the future, most were (in theory if not in deed) understanding of the issues surrounding sustainability and ecological footprint, but were divided on how future development should be planned. Some perceived that satellite cities, fully equipped with infrastructure, employment and services, was the best means to provide affordable housing for future generations. Others favoured fringe development but thought that more local employment opportunities would ease the burden on transit infrastructure. Only a few of these participants advocated for urban consolidation.
“I would be opposed to further urban sprawl, there has to be a balance between really high density and medium density. I suspect there is plenty of room in Adelaide for medium density and some high density in the future.”
“I am dead set against further expansion of the metropolitan area simply because it increases the cost and time to get from one area to another and is eating far too much into valuable agricultural land.”

Future vision

- Similar disparities in view were noted among those 55 years and older. However, this generation also lamented the fact that children were now unable (or not allowed to) play on the street and at the local park with neighbour's kids, unsupervised, as children had done in the past. This is an important factor in providing the potential health benefits to future generations of their neighbourhood being walkable and with plenty of people around to make it safe to play outside. Parents of teenagers raised a similar issue, trying to modify or restrict screen time but with nowhere for their teenager to go as an alternative to being inside, and much of their social life revolving around social networking, it was a difficult task with varying success.
- An important aspect of lifestyle for those in the older cohort was to have a dining space with the right aspect so they can sit in a sunny position (shaded if in summer) over long lunches. This suggests that balconies with a northern aspect will be a good design feature in winter among older purchasers, providing it can also be protected in summer.
- The quality of the streetscape and, in particular, the careful selection and maintenance of street trees was also a concern among this segment. Street appeal was predicated on the number and appropriateness of mature trees. Their comments included:
 - "I have got wonderful street trees. A whole generation has grown up never having had trees and that will probably flow through so you literally have boxes with very little garden and no trees."*
 - "What that does climatically, let alone aesthetically."*
 - "Developers should plant trees and shrubs that go with the area and make sure they are not going to die in a year or two."*
 - "Trees makes a huge difference, because in the types of homes being built now they are the only growing thing above waist level."*
- Some of those in this segment have downsized to smaller medium density housing already. Several comments made regarding their experiences since their move provides some insight into the needs and wants of the middle to higher end of the market.
 - "The rooms looked alright when we went into the display home, because they put minimal furniture in them, but the rooms are too small for all of our stuff and the ceilings are lower making them look even smaller."*
 - "We downsized from a rambling house to a 2 bedroom house and we really need 3 bedrooms, one for an office and computer."*
 - "When the grandchildren come over, there is no way we can fit around the kitchen table to eat as a family."*
- Among some, but not all, of the male participants in this age cohort, modern housing tends to put less emphasis on having a shed. As noted elsewhere, however, sharing a shed with others was out of the question.
 - "Homes they build now there is no shed. You can buy a small tool shed but you can't stand up in it and the only thing you can keep in there is the mower."*
 - "It is a pity, it takes away that part of the culture where we learn and do things in the garden and, maybe, become self-sufficient."*

Lifestyle and neighbourhood

- The under 30 year olds reported that having good neighbours is a bonus rather than something they look for when buying a house. Most indicated that the majority of people living around them were friendly enough but not “friends”. A typical comment was: *“we say ‘hello’ to the people around us and that is as much as we know them really”*. This was not, however, an aspect they perceived (in general) as being particularly important to them currently.
- Indeed, younger people tended to see higher density living as an environment in which people can become more isolated.
“While it presents opportunity to have people around you, it also presents the opportunity to have awful people around you.”
“If I had to say whether high density would mean I would involve myself more with neighbours, the answer is probably no. I would still hide in my house the same as I tend to do now.”
“One bad neighbour would have more impact on you than 10 good neighbours.”
- However, a small number of this age group did see the value of urban consolidation in specific areas and some mentioned areas such as Lightsvue, Mawson Lakes and Golden Grove as being good examples of a mix of housing styles and densities, with services and transport nearby.
“If Football Park ever turned into a block of vacant land, which is a possibility, you could plan that really well to incorporate something like we are talking about here.”
- Among slightly older participants (30 to 44 cohort), however, the neighbourhood becomes considerably more important. Those with children want to support their child’s social networks, to be in reasonably close proximity to “good” schools (due to zoning, choice of state school would impact significantly on their choice of location) and to be able to access activities and facilities without having to travel too far. The importance of private, open space was emphasised by this segment as being more important than size of the house. It was perceived as a social leveller, whereas inside of the house was perceived as personal space for family and close social networks rather than neighbours.
“You socialise outside because you’re less likely to invite people over if you don’t have an outdoor area. Inside might not be tidy, whereas a backyard just needs grass and a few trees.”
- Use of accessible, public open space was more frequent and regular among those in the middle family stage. The reasons for accessing open space were as might be expected: children play there, taking the dog for a walk and some said they jog in the local park.
“We use the park normally every second day, I either jog there or the dogs run there or the boys play soccer there. We really make good use of that space.”
- Across all groups, there was a concern expressed for the amount of privacy medium to high density living provides to residents. Being able to look directly into the neighbour’s home and vice versa was one aspect of this concern. Another concern raised the issue of “quiet possession”, being able to walk outside or hang washing on the line without needing to engage with neighbours. And a major issue for all segments was the ability to live without hearing neighbours *“screaming at each other”* or using tools, instruments, loud television and so on. This demonstrates the importance of ensuring that soundproofing is not only adequate but proven to be effective in mitigating sound between apartments and from the outside. This will be a key attribute in the decision making process, especially among older potential purchasers and also among singles.

Lifestyle and neighbourhood

- Among older participants, neighbourhood came with a responsibility which they felt is no longer as important in the community. As mentioned earlier, they raised concerns about how well communal spaces like gardens and trees would be looked after if the next generations did not take responsibility for this aspect. They also talked about what they perceived as changing attitudes towards keeping pets, neighbourliness and maintaining private gardens.

"Pets are things that seem to have gone by the wayside by necessity, because of limited space and work."

"Who will take responsibility for the streetscape the way it was kept in the past, if they are not learning how to do these things?"

"We don't talk to neighbour's any more, so the community spirit and kinship is gone, which is sad."

- For many in this cohort, they have experienced a lifestyle which epitomises to them the "Australian dream" and also reflected the multi-cultural aspect of Adelaide. They found it hard to conceive of how changes to this way of life could be positive. The following comments are representative of their opinions regarding neighbourhood and lifestyle:

"We had a mix of culture, like in the western suburbs the Greeks and Italians, young families now and a mix of housing and character in the area. I don't want to give that up."

"I don't want to have 5 storey blocks of boxes built along the main street in my area."

- Most of the older participants favoured continued sprawl and decentralisation over urban infill – *"I am a sprawl advocate, but I also think we should decentralise"* and *"If they can buy a house that is affordable I am in favour of going further north. Otherwise, my kids can't afford to buy a house"* were not uncommon opinions in this group.

- Some of the older participants described their positive experiences of high density living, either here in Australia or overseas. The community spirit fostered in this type of lifestyle was memorable for some, especially those who had children at the time. Their lived experience was directly opposite to the perception of those who have not experienced higher density living with children.








"The kids played in the enclosed yard, it was only 4 storeys up and I didn't find anything wrong with it."

"I made marvellous friends with people I would never have spoken with before, it was such a melting pot."

- One participant who was born in Beijing indicated that if higher density housing was available near to public transport and retail and services, she would definitely be living in this type of development. *"You can walk everywhere, you make friends easily and it is very neighbourly."* Another who had recently visited Shanghai had a similar point of view – *"Between each building they have parks, people can go and exercise, chat, play in the pond, it was just beautiful and the units were lovely. They don't have to maintain the gardens themselves."*

- However, reproducing this lifestyle in Adelaide was perceived as being aspirational, available to the wealthy only with high rise being the only affordable option, available as low socio-economic status housing. This conflict of what is achievable, within a relatively small population-base, is a challenge which will be difficult to address through private development alone.

Other aspects

-  In terms of engaging the community on the topic of liveable communities (or medium or higher density developments) most participants across all age cohorts showed interest in further information about the topic. However, whilst some wanted greater involvement than passive information dissemination, most would be satisfied with information available via a website or email updates on the TOD and road corridor strategy as it develops.
-  This finding suggests that information and engagement should be stepped:
 -  Firstly, providing more information about the concept of TOD's and road corridors, the rationale and the where's and how's to assist residents in understanding how the strategy is likely to effect them. There was a lack of informed debate about the big picture, the rationale and much of what was known tended to be emotive opinion rather than factual knowledge and understanding.
 -  Secondly, participants showed limited knowledge about specific areas of development such as Tonsley, Mt Barker and Woodville but had strongly held views about how higher density in these areas would impact on local residents, on traffic management, on arable land, and on energy and water resources (to name just the main concerns). Engagement of residents in each specific area should be undertaken more proactively to not only help create understanding but also to foster a sense of "ownership" as stakeholders with a genuine say in how their neighbourhood develops. Bringing on board the silent majority, as well as the vocal minority, will lead to better decisions and insights and ultimately better communities.
-  In terms of the former land use where new developments are planned, participants tended to trust that remediation would have been undertaken and, as purchasers of new homes on a formerly contaminated site, they also felt that any contamination would be disclosed – *"Usually it would be disclosed what was there before."* *"If your house was built on a rubbish dump, they have to tell you that when you buy".*
-  Not all participants felt this way, with one commenting that West Lakes was an example of purchasers not being told what the soil had been used for previously. *"These things tend to be highlighted long after everyone has moved in."* These points highlight the need for genuine engagement of residents, throughout the process of development, with all levels of government and developers.
-  The concept of "flat-pack housing" was raised, but it tended to raise questions that were unanswerable. These included issues surrounding re-sale values if your house was nearing the end of its shelf-life, land ownership in medium density, strata title and the issues surrounding varying community needs, other forms of ownership in medium density, issues around development and planning rules, strength and characteristics of materials and so on. The concept is worthy of further discussion but it was too big a topic to include in this project in any detail. It should be noted that one or two participants (usually males, across several age groups) were receptive to the concept and felt it had merit for future development and especially for keeping housing costs relatively affordable.

Key Findings: Testing Design Concepts

Photographs of various examples of liveable communities were shown during the discussions, to provide participants with visual cues to discuss in a more informed way rather than relying on their pre-conceived ideas of high density living.

The following analysis provides participants' perceptions of each of the liveable community designs.

DESIGN 1 – CITY APARTMENTS

- Across all age cohorts, this design was recognised as being in the east end of Adelaide *“it looks like the City on a weekend”*. It was generally perceived as well designed and appropriate for the location, although there were very few who indicated they would live in this high density environment (and all of these were either young and single or mature and single).
- Some descriptions of the design as depicted in the photograph shown (without seeing the actual apartment design) included: *“appealing to the eye”*, *“not green”*, *“expensive”*, *“clean and tidy”* and *“no individuality”*.
- It was identified by most as student accommodation, although a few thought that ‘empty nesters’, or other singles or couples without children, might live there – *“That would suit some people but not with families, that is not going to suit their lifestyle, because they need a certain amount of open space”*.
- It was considered to be very well located for both students and professional singles / couples or retirees, providing easy access to shops, cafes, the parklands and the entertainment precincts. From this perspective it was desirable - *“If I didn’t have children, I’d love to live there”* and *“Close to amenities and entertainment and the buzz of the City, it would be fantastic”*. It was also thought to be a secure building which would be attractive to single females (of any age) due to the assumed level of security.
- There were, however, genuine concerns about lack of privacy living in high rise directly opposite another high rise of similar size and with balconies and windows facing each other – *“I hate it, you can’t walk around your own home without the curtains closed”*.



Across all participants, the lifestyle represented by this photograph was perceived as aspirational, available only to the wealthy, to singles and to professionals or as transitional accommodation for students who rent from investors. It did not represent a lifestyle which these participants felt was achievable for “ordinary Australians”.

DESIGN 2 – SUSTAINABLE HOUSING, AFFORDABLE

- Very few participants recognised this built form as part of the Lochiel Park development. When told the majority did not know where Lochiel Park was or anything about the concept behind this development. The quantitative surveys revealed that environmental concerns were not high in priority in housing decision making and participants' views on the energy efficient design in affordable housing confirms that there is a general lack of understanding about this aspect of housing design.
- First impressions were, generally, not positive across all groups, including the following quotes: *"It looks unfinished"*, *"Very unappealing"*, *"Where are the verandahs and carports"*, *"It looks sideways, like they have built them the wrong way to make them fit"* and *"I hate modern architecture, I would not live in that"*.
- The houses shown in the photograph were strongly criticised by the youngest participants in particular, who felt that medium density must provide a sense of privacy from neighbours and from the street and that windows facing directly onto the neighbours was unappealing – *"I could live in this suburb, but not in this house. It is too close, you could have a conversation with your neighbour through the toilet window and that is not good"*. This is a similar point to the one made regarding Design 1 in the east end.
- One participant in the under 30's cohort felt so strongly about the design of some medium density housing she made the following comment *"I really hope people come to their senses and think 'this is ridiculous, why did we do this' and tear it all down and go back to the way it used to be"*. Whilst this does not represent all views, it does demonstrate that people in general (including those in the market for new housing) are polarised with regard to their feelings about medium density development and the designs they have seen.



The concept of sustainable housing appears to have somewhat limited appeal. Like high density City apartments, it is not accepted that this lifestyle is universally available to all home buyers. In addition, the majority of participants across all ages indicated they were not prepared to pay more for design that does not, in their opinion, have street appeal.

Those who were most receptive to the benefits of living in a “sustainable village environment”, that is people 55 years and older, did not like aspects of the design of the built form. In particular, two storeys was a barrier as was the modernity of design and materials – *"That would like nice down at the beach somewhere but not necessarily in the middle of suburbia"* and *"Alright for the younger people but not for my age group who refuse to walk up and down stairs and break my neck"*.

One aspect which did stand out for all age cohorts, however, was the fact that suitable, mature trees helped soften the impact of the straight lines and added appeal.

On the other hand, the design was perceived as “quite industrial” and many expressed the view that brick is preferable to concrete and timber as it is more solid – *"it doesn't even look like a house"*.

DESIGN 3 – HOUSING ESTATE WITH PLAYGROUND

- First impression of this lifestyle picture was that the trees added character and charm. The shops and café underneath were also notable features to which most participants reacted favourably.
- The park across the road, on the other hand, did not attract much attention from any of the age cohorts. Most comments were from parents who felt that the park would not replace a back garden for their children.

“When my children get up in the morning and want to go outside in their pyjamas, I can hardly let them go across the road like they can in the back yard.”

“They have to cross a road with traffic to get to the park. I wouldn’t let my children go there on their own.”

“The central meeting point is a good idea, but it doesn’t have the ability to entertain or to have children in private space.”
- Whilst some did not mind the built form, suggesting that the balconies and window treatments added character rather than just a “flat face”, others posed the question *“if you took away those trees, what would it look like, it would look like a box?”*.
- Two opposing views among two participants in the mature family cohort demonstrated the varying perspectives of those who are strongly car-oriented compared with those who are more willing to embrace life without being car-dependent – *“Where are you going to park your cars, guys, with those shops underneath?”* and *“I will be working in the City and probably won’t need a car”*.
- Noise abatement measures was an important consideration for the oldest cohort, who felt that apartments such as these, with neighbours on all sides and traffic and a park outside, would be a very noisy neighbourhood and would not suit their desire for *“peace and quiet”* and privacy.



It was also considered to be higher density living than other lifestyle photographs they had seen to this point and this was off-putting in terms of the same type of barriers raised to higher density development throughout the research. That is, the impact on road and other infrastructure of the volume of residents coming into an established area with what they perceived would be no change to the infrastructure to support the additional people.

DESIGN 4 – RESIDENTIAL AND COMMERCIAL MIX

- Early impressions of the tram, piazza and medium density residential and retail mix were that it was a *“nice streetscape”, “there’s a sense of space”* and the *“public transport is right there”* but otherwise it did not seem to participants to be so much somewhere to live as a place to shop and work (i.e. they saw it in terms of a mall but not as a liveable community).
- The dominant perception of this lifestyle photograph was the amount of brick pavers and lack of lawn or plants apart from a few trees. Water catchment and retention in areas with piazzas and no obvious drainage systems was a concern, particularly among those 45 years and older.

“There are a lot of concrete bricks. Unless you have ways of getting the water into the ground, you are actually draining a lot of water and causing storm water problems.”

“All that paved area, but when you take the lawn out of an area and most of the trees, what you are left with is a very hot area.”



These views suggest that the public needs more information about modern water management, including aspects such as water catchment through building design, replenishing aquifer and water reticulation. The discussions highlighted considerable misinformation. The concept of liveable communities will gain greater acceptance if the public understands more of the detail.

Similar findings were noted regarding dated views about noise from external (e.g. tram) and internal (e.g. shared walls) sources. Generally participants had limited information about modern building materials and had difficulty perceiving of energy efficiency and noise reduction through design and materials.

DESIGN 5 – HOUSING ESTATE WITH COMMUNAL GARDEN

- Across all age cohorts the initial impression of this design was that it looked more like a hotel than permanent accommodation. Having said this, it was on the whole perceived quite positively even though some participants could not articulate why they quite liked this design.
- The central court with gardens, very green lawn and plants (and also plants on many balconies) were standout features of their initial impressions.
- Among the youngest segment, there was a generally negative perception of this high rise development. It was thought to look like *“a 1970’s hotel, not a nice one either”* and in general they said it was *“nice greenery but I wouldn’t want to live there”*.
- The cohort 30 to 44 years did not like the design of this building at all, with the garden not able to mitigate their perceptions. A common perception among those in the young to middle family life-stage was that this was okay for others but not suitable for families who have expectations of a detached house on its own land.

“You would probably entice migrants who have experienced high density populations into something like that, but those of us who are used to having bigger houses and bigger gardens would say no to that.”

- The middle to mature family segment (45 to 54 years) were also unanimous in their negative reaction to this housing estate / lifestyle. They felt that the built form was overpowering, particularly with the L shape dominating the park area – *“the building itself is pretty ugly”*. The garden was considered to be too small to *“kick a football”* and the shared shed would not work among this group. *“That is my domain, I wouldn’t share it so I’d never go there”* was a common statement. However, a few felt that the communal garden was a good concept and it might promote social contact between residents.
- Interestingly, the next age segment (mainly, empty nesters or singles) quite liked the thought of living in this estate with its communal garden and open balconies being standout features.



- In their opinion, it lacked only some tall trees to soften and provide shade and wanted to ensure that the amount of green space was sufficient *“commensurate with the building size and not just what is in the photograph”*.
- Their perceptions about whether something like this would be built in Adelaide, however, were slightly less optimistic.

“Most developers would turn over in their grave if they had to give up that much land and have lawn and garden which is quite pleasant.”

DESIGN 6 – PARK, WALKWAYS AND LAKE

- As with the online survey, this design came up as the most appealing across the widest socio-demographic profile. Most recognised it as Mawson Lakes and were favourable towards this particular built form even if there were other parts of Mawson Lakes they did not like (mention was made of McMansions, buildings that remind them of concrete blocks and built form that do not have the water, lawn and walking paths outlook).
- Among the youngest cohort, a number indicated they could live in an apartment like this, with café and shops underneath, balconies and the waterfront. However, not all were favourable towards the lake concept, preferring the water to be usable for recreation purposes.
- In the next age segment, the lake also came under some criticism as looking like storm water catchment rather than being a functional lake.
"In Singapore, lakes are both storm water catchment and attractive lakes used for recreation. There are water activities, it is also used for drinking as well as recreation."
- The built form was also less attractive to this segment, some of whom thought it was not private and was too impersonal for a family "home", whilst several felt that some of the medium density in Mawson Lakes was *"a slum in the making"*.
- Much of the discussion among those in the middle to mature life-stages (45 to 54 years) focused their attention on Mawson Lakes in a general sense when discussing their perceptions of this design. Issues such as the large houses were the main concern: *"What I don't like is the very large, single occupancy houses they build on the entire block and zero consideration given to environmental factors"*.
- This was not an isolated view among this group. *"They have multi-kilowatt air conditioners running 24 / 7, so they are very energy inefficient houses."*



- There were also other comments along these lines, suggesting that environmental footprint is more front of mind among older residents than it is among those under 45 years.
"There is no shade anywhere."
"I drove around Mawson Lakes and there were no houses with solar panels other than for water heating. They should have built them that way."
- Likewise, the oldest group had similar views to those expressed above, including *"they need more landscape and plant and more large trees"*.
- These comments about Mawson Lakes highlight the need to engage the community in the development process at an early stage to ensure that residents in surrounding areas are supportive of the development and perceive that it enhances their area rather than detracting from it.

APPENDIX A: Questionnaire – Phone Survey

8210 THINKERS IN RESIDENCE PROGRAM PHONE SURVEY - HIGHER DENSITY RESEARCH ~ MARCH 2011

- Good afternoon/evening, my name is _[Q0IV]_ from Harrison Research. We are conducting a survey about residential development and what South Australians would like Adelaide to look like in the future. The survey is being undertaken on behalf of Fred Hansen and The Adelaide Thinkers in Residence program.
- In the process, we are speaking with people who: live in the greater Adelaide area; make decisions about where they will live; rent, own or are purchasing their home; and would like to have input into how Adelaide will meet the challenges of future development.
- _IF NECESSARY, SAY:_ This is genuine research and I guarantee we are not trying to sell you anything.
- _SCREEN 1:_ Does anyone in this household work in market research or in the field of urban planning and development? _IF YES, THANK AND TERMINATE_
- Please may I speak to the person in the household, aged 18 and over, who makes decisions about where they live AND who was the last to have a birthday? _REINTRODUCE OR CALLBACK AS NECESSARY_
- PAUSE
- "The survey will take about 20 minutes to go through, depending on your answers. _IF THEY'RE HESITATING BECAUSE OF TIME_ We do need to get opinions from as wide a cross-section as possible; I could call back later if it would be more convenient. _ARRANGE CALLBACK IF REQUIRED OR CONTINUE_
- _IF CONCERNED ABOUT PRIVACY_ I assure you that any information you give will remain confidential. Any identifying information, such as this phone number, is removed before we analyse the results. No one's individual answers can be passed on to our clients or anyone else.
- And before we start, I just need to let you know that this call may be monitored by my supervisor for training and coaching purposes. May we begin? Thank you.
- Q1. CURRENT HOUSING STATUS.
 - "Q1 I'm just going to ask a few questions about your current housing, so we can better understand your responses. Firstly, in what sort of house do you currently live?_UNPROMPTED, BUT PROBE_"
 - 1. Flat or apartment - shared walls
 - 2. Granny flat / Additional dwelling
 - 3. Multi-storey Terrace or Townhouse
 - 4. Shop-top unit / flat / apartment
 - 5. Single storey detached house
 - 6. Single storey villa or unit
 - 7. Two or more storey detached house
 - 8. Other (SPECIFY Q101)
- Q2. HOUSING STATUS
 - "Q2 Which of the following best describes your housing status?_READ OUT_"
 - 1. Fully owned - no mortgage
 - 2. Being purchased - with mortgage
 - 3. Being purchased - rent / buy scheme
 - 4. Rental - public or community housing
 - 5. Rental - private landlord / agent
 - 6. Boarding / lodging
 - 7. Rent or board-free
- . Q3. RECENT OR FUTURE PURCHASE OF HOME
 - "Q3 Have you either purchased a home in the last 5 years OR think you may purchase a home within the next 10 years? By home, we mean where you intend to live rather than as an investment property."
 - 1. Yes, bought a home in last 5 years
 - 2. Yes, thinking about purchasing within 10 years
 - 3. No, do not own a home and do not anticipate purchasing
 - 4. No, have lived in current home many years and don't contemplate selling within 10 years.
 - 5. Other (SPECIFY Q301)

8210 THINKERS IN RESIDENCE PROGRAM PHONE SURVEY - HIGHER DENSITY RESEARCH ~ MARCH 2011

▪ Q4. FEATURES OR ATTRIBUTES OF LOCATION

- "Q4 When considering the area of your new house, either when you bought recently or in the future, what would you say are the most important attributes when deciding where you want to live (i.e. the location)? _UNPROMPTED, BUT PROBE WITH 'ANYTHING ELSE?'_"
- 1. Access to transport
- 2. Affordability
- 3. Character of the area
- 4. Close to cycling and/or walking paths
- 5. Close to family / friends
- 6. Close to public transport
- 7. Close to schools / university
- 8. Close to work
- 9. Close to shops and other services
- 10. Community meeting places, community space
- 11. Cost of transport / regular travel
- 12. Distance from CBD
- 13. Established area
- 14. Familiarity with the area
- 15. Green / open spaces
- 16. Good neighbourhood / friendly
- 17. New estate / new development
- 18. Quiet / not busy or too congested
- 19. Safety / low crime
- 20. Sense of community
- 21. Social amenities available (e.g. playing fields, ovals, recreation areas, playgrounds etc.)
- 22. Street life, cafes and places to socialise
- 23. Views / outlook / pleasant surroundings
- 24. Other (SPECIFY Q401)
- 25. Don't know / can't say / haven't thought about it

▪ Q5. FEATURES OR ATTRIBUTES OF HOME

- "Q5 And thinking now about the house itself, what are the most important attributes when choosing or designing a home? _UNPROMPTED, BUT PROBE WITH 'ANYTHING ELSE?'_"
- MR
- split=2
- 1. Affordability, meets the budget
- 2. Back garden / outdoor entertaining area
- 3. Brand new
- 4. Car parking for 2 cars or more
- 5. Character home / period architecture
- 6. Energy / resource efficiency
- 7. Established / nothing needs to be done
- 8. Front garden
- 9. Layout and suitability to life-stage
- 10. Low maintenance
- 11. Modern / contemporary architectural design
- 12. Two bathrooms or more
- 13. Size of land / large block
- 14. Spacious living areas
- 15. Technology
- 16. Three or more bedrooms
- 17. Single storey
- 18. Two storeys
- 19. Other (SPECIFY Q501)
- ---
- 20. Don't know / can't say / haven't thought about it

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- Q6INTRO
- "We are now going to talk about populations and housing. It is expected that the need for more houses will continue to increase, due in part to decreasing family size and increasing numbers of single person households, as well as increases in population."
- Q6. LOCATION OF NEW HOUSING
- "Q6 Where in Adelaide do you think extra housing should be located? Should it be in...?_READ OUT 1-5_"
- 1. The urban fringe, such as new developments further north and south
- 2. Satellite cities, further from metropolitan Adelaide
- 3. Urban infill in existing, established suburbs
- 4. Development centred around transport hubs
- 5. Somewhere else (SPECIFY Q601)
- 6. Other (SPECIFY Q602)
- ----
- 7. Don't know / haven't thought about it
- Q7INTRO
- "Medium to high density housing development ranges from 2-3 storey dwellings on small allotments, to small office/home office (soho), apartments above shop fronts, and residential apartment buildings. It is expected that development of 3 to 6 storeys may well be the most common form."
- Q7. HIGH DENSITY LIVING
- "Q7 Have you ever lived in medium to high density housing, either in Adelaide, interstate 1. Yes, in Adelaide
- 2. Yes, interstate
- 3. Yes, overseas
- 4. No
- Q8. UNDERSTANDING OF HIGHER DENSITY
- "Q8 Thinking about the lifestyle of higher density living, can you describe what you believe higher density living means in practice? _UNPROMPTED, BUT PROBE WITH 'ANYTHING ELSE?'_"
- 1. Affordable housing
- 2. Attracts better infrastructure e.g. public transport, alternate energy sources
- 3. Common / shared walls
- 4. Expensive
- 5. High quality apartments / luxury
- 6. High rise / apartment living
- 7. Improved sense of community
- 8. Increased land values
- 9. Less reliance on cars
- 10. Limited open space - external / outdoor
- 11. Limited space - internal (i.e. smaller floor-space, less room)
- 12. Low / no garden maintenance
- 13. More than 2 storeys
- 14. No garden / no backyard
- 15. Noise / privacy issues
- 16. Parking issues / lack of parking
- 17. Poor quality housing
- 18. Reduced land values
- 19. Social behaviour problems
- 20. Stopping urban sprawl / fringe development
- 21. Strain on infrastructure like roads, public transport
- 22. Strain on resources like water, energy supply
- 23. Sustainable housing
- 24. Traffic congestion
- 25. Two houses on one block / subdivision of older blocks
- 26. Other (SPECIFY Q801)
- 27. Don't know / can't say

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- Q9. FUTURE HOUSING NEEDS
- "Q9 Thinking about the housing in which you are likely to be living in the future, and taking into account life changes such as having children or children leaving home. What type of housing do you think you are most likely to be living in, in ten year's time?_UNPROMPTED, BUT PROBE FOR SPECIFIC DETAILS_"
- 1. Same house as now
- 2. Single storey detached house
- 3. Two or more storey detached house
- 4. Single storey villa or unit
- 5. Multi-storey Terrace or Townhouse
- 6. House above a shop / office
- 7. Flat or apartment with shared walls
- 8. Granny flat / Additional dwelling
- 9. Independent unit or villa in a retirement village
- 10. Residential care / nursing home
- 11. Other (SPECIFY Q901)
- 12. Don't know / can't say
- Q10. AWARE OF 30 YEAR PLAN
- "Q10 What, if anything, have you heard about the 30 Year Greater Adelaide Plan?_UNPROMPTED_"
- 1. Plan to increase population
- 2. Plan for higher density residential development
- 3. Plan to infill development in existing suburbs
- 4. Plan to put in more public transport
- 5. Development around transport and activity hubs
- 6. Other (SPECIFY Q1001)
- 7. Heard of it, but don't know anything / much about it
- 8. Nothing / never heard of it
- Q11INTRO
- "The 30 year plan is a strategy to guide future growth in Adelaide, to address issues such as rising fuel prices, traffic congestion, housing affordability, population increase, environmental issues and demographic change."
- Q11. PERSONAL RELEVANCE OF STRATEGY
- "Q11 Thinking about this statement, to what extent do you see this plan as relevant to you and your family? Use a 0 to 10 scale where 0 is not at all relevant and 10 is highly relevant._INTERVIEWER NOTE: READ STATEMENT AGAIN IF NECESSARY_"
- Q12. WHY RELEVANT OR NOT
- "Q12 Why do you think that way?"
- Q13. AWARE OF TODS
- "Q13 And have you heard about transit oriented developments or TOD's, as they are called?"
- 1. Yes
- 2. No
- 3. Not sure / can't say
- Q14INTRO
- "Transit oriented developments create more compact urban development. The focus is on concentrating development centred around public transport services and amenities. The strategy emphasises access to local jobs and services closer to homes, higher density living and greater reliance on public transport."
- Q14. AGREEMENT WITH STRATEGY
- "Q14 Thinking about this statement, to what extent do you think this type of development is relevant to you and your family? Use a 0 to 10 scale where 0 is not at all relevant and 10 is extremely relevant."
- Q15. WHY RELEVANT OR NOT
- "Q15 Why do you think that way? _"

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▪ Q16. BENEFITS OF TOD / HD DEVELOPMENT

- "Q16 Thinking about the possible impact of higher density, transit oriented development on the wider community, what benefits, if any, do you think higher density will offer residents of Adelaide?_UNPROMPTED_"
- 1. Ability to live closer to next generation(s) (i.e. children or grandchildren)
- 2. Affordable housing closer to city
- 3. Better public transport services
- 4. Cafe lifestyle
- 5. Close community / neighbourhoods
- 6. Environmental benefits
- 7. Healthier lifestyle / more exercise
- 8. Improved natural resource management (i.e. water, energy)
- 9. Local economy stronger / local employment
- 10. Private car use reduced
- 11. Stopping urban sprawl / loss of agricultural land
- 12. Walking distance to shops and services
- 13. Sense of community
- 14. Social infrastructure (e.g. schools, services, community centres etc.)
- 15. Sustainable future for children / grandchildren
- 16. Other (SPECIFY Q1601)
- 17. Don't know / can't say
- 18. None / no benefits

▪ Q17. NEGATIVE ASPECTS OF TOD / HD DEVELOPMENT

- "Q17 And what negative effects, if any, do you feel higher density, transit oriented development would have on the Adelaide community?_UNPROMPTED_"
- 1. Less open space, parks, recreational areas
- 2. Loss of character in older areas
- 3. Loss of property values in surrounding areas
- 4. Overcrowding, too many people too close
- 5. Overlooking / loss of privacy
- 6. Poor quality housing / potential slum areas
- 7. Social behaviour / personal safety issues
- 8. Social infrastructure like schools, doctors, services over-extended
- 9. Traffic congestion / greater traffic problems
- 10. Other (SPECIFY Q1701)
- 11. Don't know / can't say
- 12. None / no negative impacts

▪ Q18G. ATTITUDINAL STATEMENTS

- "Q18G I am going to read out some statements about housing in general. Using a 0 to 10 scale where 0 is strongly disagree and 10 is strongly agree, to what extent do you agree or disagree that...? _READ OUT_"
- 1. Housing is unaffordable for many young people
- 2. A home must include private open space, such as a back garden
- 3. It is preferable to live on the fringe of Adelaide in a detached house with a garden
- 4. Having a mix of light industrial, commercial and residential in one location is important
- 5. Children do not belong in higher density living
- 6. Higher density housing offers affordability without living too far away from everything
- 7. Building new suburbs on the fringe of Adelaide is environmentally unsound
- 8. Travelling long distances to get to work is acceptable
- 9. Traffic congestion would be better managed by good public transport systems
- 10. Modern families need larger houses and smaller gardens
- 11. Restricting urban sprawl is energy and resource efficient
- 12. Higher density housing means small homes suited to singles or couples

▪ Q19G. IMPORTANT ASPECTS IN HOUSING DECISIONS

- "Q19G Thinking about the various things you may take into account when looking for accommodation to live in, or is important about where you live now. Using a 0 to 10 scale, please rate the following statements by their importance to you, with 0 being not at all important and 10 being very important._READ OUT_"
- 1. Public transport is nearby, frequent and easy to access
- 2. Private, off-road parking is available for your car
- 3. Public parking is available in hubs, so you can park at the hub and catch public transport
- 4. The physical environment is attractive and welcoming
- 5. Streetscapes include traffic calming, footpaths and attractive trees
- 6. The land on which your house stands was formerly pastoral or residential land
- 7. Affordability is more important than quality of life
- 8. The local supermarket and services are within walking distance
- 9. The site is appropriate in size for the number of people living there
- 10. People in the neighbourhood live in a similar way to you
- 11. There are plenty of safe off-road walking and cycling paths

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- Q20. LIFESTYLE OF TOD
- "Q20 Imagine that you are living near to public transport, with a range of shops and services nearby and work was either a short bus trip away or within cycling or walking distance. In what ways, if any, would this be different to your current lifestyle? _UNPROMPTED_"
- 1. Have this lifestyle now
- 2. Improve quality of life
- 3. Closer to City and services
- 4. Use public transport more often
- 5. Walk or cycle more often
- 6. Would not need the second car
- 7. Would shop more frequently / smaller loads
- 8. Other change (SPECIFY Q2001)
- 9. Don't know / can't say
- 10. Not at all / would not change
- Q21G. ATTITUDE TO LIFESTYLE STATEMENTS
- "Q21G Thinking a little more about the type of lifestyle close to public transport, I am going to read out some statements and would like you to consider the extent you agree with each one. Use the same 0 to 10 scale where 0 is strongly disagree and 10 is strongly agree._READ OUT_"
- 1. I would be willing to live within a location with mixed development of light industrial, commercial and residential.
- 2. I would be willing to live in higher density with children
- 3. I would feel safe using public parking at public transport hubs
- 4. The local neighbourhood includes cafes, open public space and play areas
- Q22. COMMUNICATION RE TOD'S
- "Q22 To what extent would you like to be kept informed of further development and planning of the Transit oriented development concept? Would you like...? _READ OUT_"
- 1. Information via commercial and local media only] Q24
- 2. Information via a website, email updates on progress] Q23
- 3. Active participation in workshops, community engagement and so on] Q23
- 4. No further involvement] Q24
- Q23. CONTACT DETAILS
- "Q23 Would you mind providing your full name and email address for contact for email updates or active participation? _CAPTURE NAME AND EMAIL ADDRESS FOR CONTACT AND READ BACK TO CONFIRM_"
- 1. FULL NAME (SPECIFY Q2301)
- 2. E-MAIL (SPECIFY Q2302)
- "Q24 Is there anything further you wish to add, which you have not yet had the opportunity to say, regarding transit oriented or higher density developments in general? _OPEN-ENDED, PROBE_"
- 1. Positive suggestion or comment (SPECIFY Q2401)
- 2. Negative suggestion or comment (SPECIFY Q2402)
- 3. Nothing further to add
- Q25. GENDER.
- "Q25. Record gender (do not ask unless can't tell)"
- 1. Male
- 2. Female
- Q26. YOB
- "Q26 I would just like to spend a few minutes more understanding a little bit about who you are. What year were you born? _RECORD NUMBER, D IF REFUSED_"
- Q27. HOUSEHOLD
- "Q27 How would you best describe your household? _READ OUT 1-8 ONLY IF NECESSARY_"
- 1. Lone person household
- 2. Group household of related or unrelated adults
- 3. Young couple, no children
- 4. Older couple, no children at home
- 5. Couple or single parent with mainly pre-school children
- 6. Couple or single parent with mainly primary-school children
- 7. Couple or single parent with mainly teenage children
- 8. Couple or single parent with mainly adult children still living at home
- 9. Refused

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- Q28. EMPLOYMENT STATUS
- "Q28 What is your current employment status?"
- 1. Part-time employment
- 2. Full-time employment
- 3. Unemployed
- 4. Home duties
- 5. Pensioner (non-age pension)
- 6. Retired / age pensioner
- 7. Student
- 8. Refused
- Q29. DESCRIPTION OF OCCUPATION
- "Q29 How do you describe your occupation?"
- 1. Manager / administrator
- 2. Professional
- 3. Associate professional
- 4. Tradesperson / related worker
- 5. Advanced clerical, sales & service worker
- 6. Intermediate clerical, sales & service worker
- 7. Intermediate production and transport worker
- 8. Elementary clerical, sales & service worker
- 9. Labourer / related worker
- Q30. EDUCATION
- "Q30 Which of the following best describes the highest education level you have completed or are currently undertaking? _READ OUT 1-4_"
- 1. High school
- 2. Trade/Apprenticeship
- 3. Certificate/Diploma
- 4. Bachelor degree or higher
- 6. Did not complete highschool
- 5. Refused
- Q31. POSTCODE
- "Q31 WHAT IS YOUR POSTCODE?"
- Q32. HOUSEHOLD GROSS INCOME
- "Q32 Which of the following ranges best describes your household's gross income? _READ OUT 1-7_"
- 1. Less than \$25,000 per annum
- 2. \$25,000 to less than \$50,000
- 3. \$50,000 to less than \$75,000
- 4. \$75,000 to less than \$100,000
- 5. \$100,000 to less than \$150,000
- 6. \$150,000 to less than \$200,000
- 7. \$200,000 or more
- 8. Don't know
- 9. Refused
- Q33. ETHNICITY
- "Q33 Which national, ethnic or cultural heritage do you MOST identify with; that is, how do you describe yourself?"
- 1. Aboriginal / Torres Strait Islander
- 2. Australian
- 3. Australian-Chinese
- 4. Australian-English
- 5. Australian-Greek
- 6. Australian-Indonesian
- 7. Australian-Irish
- 8. Australian-Italian
- 9. Australian-other (SPECIFY Q3301)
- 10. African
- 11. Asian
- 12. European
- 13. Middle Eastern
- 14. North American
- 15. South American
- 16. Other nation / ethnicity / culture (SPECIFY Q3302)
- 17. Refused

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- Q34. REGULAR TRAVEL MODE
- "Q34 And one final question, thinking about when you make regular trips, such as getting to work, study or other regular destinations and back home again. Which mode of travel do you use most often for regular trips?"
- 1. Private car, as the driver
- 2. Private car, as a passenger
- 3. Bicycle
- 4. Walking to destination
- 5. Train
- 6. Tram
- 7. Bus
- 8. Scooter or motor bike
- 9. Walking to transport hub, catching public transport
- 10. Driving to transport hub, catching public transport
- 11. Paid private transport (e.g. taxi, hired driver)
- 12. Don't make regular trips
- 13. Other (SPECIFY Q3401)
- Q35. CLOSE
- "Q35 That concludes the survey. On behalf of the Land Management Corporation, the Thinker's in Residence Program and Harrison Research, thank you for your time. Your input is valued highly and will have an impact on how the future of Adelaide is shaped. "
- BLANK

APPENDIX B: Questionnaire – Online Survey

8210 THINKERS IN RESIDENCE – ONLINE QUEST - HIGHER DENSITY RESEARCH MARCH 2011

- Thank you for agreeing to undertake this interesting survey about future residential development in Adelaide. Your input is not only highly valued but will help to shape future growth in Adelaide.
- The Thinkers in Residence Program, and Fred Hansen, are keen to find out the perceptions and opinions of a range of Adelaide residents on the subject of higher density development centred around transport hubs as the way forward for economic, population and environmental sustainability.
- Harrison Research is an internationally accredited, local research agency which has a long tradition of undertaking high quality social research. We can assure you that any information you provide will remain confidential. Any identifying information will be removed before we analyse the results and no individual answers can be passed on to anyone else.
- Q1 ACCOMMODATION TYPE
- 1. Firstly, what type of accommodation do you currently live in? SELECT THE MOST APPROPRIATE RESPONSE
 1. Detached house
 2. Semi-detached house
 3. Villa, unit or townhouse, single or two storey
 4. Apartment – more than two storeys
 5. Other type – SPECIFY
- Q2 HOUSING STATUS
- 2. Which of the following best describes your status in terms of housing?
 1. Owner / occupier
 2. Private renter
 3. Public renter
 4. Living with parents
 5. Something else – SPECIFY
- Q3 RECENT OR FUTURE PURCHASE OF HOME
- 3. Have you either purchased a home in the last 5 years OR think you may purchase a home within the next 10 years? By home, we mean where you intend to live rather than as an investment property.
 1. Yes, bought a home in last 5 years
 2. Yes, thinking about purchasing within 10 years
 3. No, do not own a home and do not anticipate moving in next 10 years
 4. No, have lived in current home many years and don't contemplate moving within 10 years.

- Q4 HIGH DENSITY LIVING
- 4. Have you ever lived in medium or high density housing? SELECT ALL APPROPRIATE RESPONSES
 1. Yes, in Adelaide
 2. Yes, interstate
 3. Yes, overseas
 4. No
- Q5 UNDERSTANDING HIGH DENSITY
- 5. In your own words, what do you understand higher density living to mean in practice?
- Q6 ADVANTAGES OF HIGHER DENSITY LIVING
- 6. What advantages, if any, do you think higher density living may offer? OPEN ENDED. IF YOU HAVE NOT EXPERIENCED HIGHER DENSITY LIVING, WE WOULD STILL LIKE TO HEAR YOUR OPINIONS. PLEASE PUT DOWN WHAT YOU THINK THE ADVANTAGES MIGHT BE, IF ANY
- Q7 DISADVANTAGES OF HIGHER DENSITY LIVING
- 7. And what disadvantages, if any, do you think higher density living may have? OPEN ENDED. IF YOU HAVE NOT EXPERIENCED HIGHER DENSITY LIVING, WE WOULD STILL LIKE TO HEAR YOUR OPINIONS. PLEASE PUT DOWN WHAT YOU THINK THE DISADVANTAGES MIGHT BE, IF ANY

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- Q8 KEY ATTRIBUTES OF A NEW HOME
- 8. If you were looking for a home today, what would be the top FIVE priorities for you in selecting a place to live? Please choose 5 options from the following suggestions:

1. The cost of purchase is within our budget
2. The rental cost is within our budget
3. Location in a suburb where we want to live
4. It is near to work and / or school
5. The house has the right character, look and feel
6. It is near to family and / or friends
7. The neighbourhood has good amenities and social activities
8. It is available for rent / purchase
9. It has low ongoing living costs, such as water, energy
10. The area has frequent and reliable public transport access
11. It is a quiet area / not busy
12. It is near to the City
13. It is near to good cycling paths / off-road tracks
14. It has a sense of community
15. The street life, cafes and streetscapes are vibrant and attractive
16. The cost of transport / regular travel is affordable
17. Streetscapes are designed to prioritise cycling and walking
18. Some other priority – PLEASE SPECIFY BELOW

- **Explanation:** Medium to high density housing development ranges from 2-3 storey dwellings on small allotments, to small office home office (soho), apartments above shop fronts, and residential apartment buildings. it is expected that development of 3 to 6 storeys may well be the most common form.
- On the following pages there are some photographs, in sets of 3, showing different designs of higher density housing. We would like you to visualise the exterior designs which most closely suit your lifestyle, both now and what you think you will need in ten year's time. Even if you have no intention of moving, we would still like you to indicate your preferences, if any, in the designs shown.
- Please choose two designs from each set of three, one for your current lifestyle and one (it can be the same design) for what you think your future needs will be. **NOTE:** Assume that the internal layout, size and design of each building is the same and ideal for you.

DESIGN CHOICES



Building A



Building B



Building C

- Q9 Which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs currently?
- A, B, C or None
- Q10 Which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs in ten year's time?
- A, B, C or None



Building A



Building B



Building C

- Q11 And which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs currently?
- A, B, C or None
- Q12 And which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs in ten year's time?
- A, B, C or None

8210 THINKERS IN RESIDENCE – ONLINE QUEST - HIGHER DENSITY RESEARCH MARCH 2011



Building A



Building B



Building C

- Q13 And which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs currently?
- A, B, C or None
- Q14 And which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs in ten year's time?
- A, B, C or None



Building A



Building B



Building C

- Q15 And which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs currently?
- A, B, C or None
- Q16 And which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs in ten year's time?
- A, B, C or None



Building A



Building B



Building C

- Q17 Which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs currently?
- A, B, C or None
- Q18 Which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs in ten year's time?
- A, B, C or None



Building A



Building B



Building C

- Q19 Which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs currently?
- A, B, C or None
- Q20 Which, if any, of these medium to high density housing designs do you think would meet your housing and lifestyle needs in ten year's time?
- A, B, C or None

8210 THINKERS IN RESIDENCE – ONLINE QUEST - HIGHER DENSITY RESEARCH MARCH 2011

- Q's 21 to 32 CHOICE MODELLING
- Over the next few screens we would like you to imagine you are looking for new accommodation. On each screen you will be presented with three accommodation options, with different levels of alternatives. Please indicate which ONE option you would be most likely to select if you had to choose between each of the three, with everything else being equal.
- For instance, option 1 might be located close to your work, recreation or study, but with a shared wall and limited garden in the back and no private open space at the front. On the other hand option 2 might be 30 minutes away from your work, recreation or study yet with a large 3 or 4 bedroom house and overlooking a park. And a third option might be a smaller 2 or 3 bedroom home but be close to your work, recreation or study institution and with good, reliable public transport nearby. Given these three options you would simply need to indicate which of the three you would most likely choose to suit your current lifestyle and life-stage. EXAMPLE:

If you were looking for new housing today and these were your only options, which would you choose? Each scenario is slightly different from the previous ones you have seen. Choose by clicking one of the buttons below:

Building form	Single storey detached house	Single storey detached house	Private flat, 4 to 5 storey block, less than 30 flats in the complex
Size	3-4 bedrooms	Large room size, 1 bedroom	Modest size 2 bedrooms with balcony
Proximity to work and services	15 minutes to work, schools, parks and basic services/shops	30 minutes to work. Schools, parks and basic services/shops short drive away	45-60 minutes to work. Schools, parks and basic services/shops not within walking distance.
Proximity to public transport	Not close to public transport, need car(s)	Several options for travel, own car, public transport or off-road cycling	Close to public transport
Proximity to the City	Suburbs, moderate distance to the City	Inner suburbs, close to the City	Inner suburbs, close to the City
Views	Streetscape and local playground	Limited views of surroundings	Limited views of surroundings
Open space	Small private courtyard but no private front garden	No private open space but park short walk away	Enclosed back and front gardens
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- Q's 33-38 LIFESTYLE VIEWS
- We will now look at some wider views of potential Transit Oriented Developments (TOD's) or Road Corridor developments, which demonstrate the type of lifestyle anticipated in higher density developments. Some of these are artists' impressions while others are actual examples from Adelaide and overseas. Taking into consideration the design of the building, the environment it sits within, and services like transport, businesses and shops, being located nearby, how closely do you believe each of the examples shown would suit your lifestyle. Please use a 0 to 10 scale, where 0 is not at all close and 10 is spot on.
- Q33. Lifestyle Views



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- Q34 LIFESTYLE VIEWS



- Q36 LIFESTYLE VIEWS



- Q35 LIFESTYLE VIEWS



- Q37 LIFESTYLE VIEWS



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- Q38 LIFESTYLE VIEWS



- Q39 SENSE OF COMMUNITY
- Q39 How important is it that there is a sense of community where you live? Use a 0 to 10 scale where 0 is not at all important and 10 is extremely important
- Q40-41 PRICE POINTS
- If you were to either purchase OR rent the most suitable higher density to suit your lifestyle, what would be your price range? CHOOSE ONE ONLY FROM EITHER PURCHASE OR RENTAL PRICE RANGE
- Q40 PURCHASE PRICE
- 1. Under \$290,000
- 2. \$290,000 to under \$450,000
- 3. \$450,000 or more
- Q41 RENTAL PRICE
- 1. Under \$250 per week
- 2. Between \$250 and under \$400/week
- 3. \$400 per week or more

- Q42 COMMUNICATION RE TOD'S
- Q42 Which of the following best describes the extent you would like to be kept informed of further developments in the Transit Oriented Developments and Road Corridor concept? CHOOSE ONE ONLY
- 1. No further involvement
- 2. Information via commercial and local media only
- 3. Information via a website, email updates on progress
- 4. Active participation in workshops, community engagement and so on
- Q43 FINAL SUGGESTIONS / COMMENTS
- "Q43 Is there anything further you wish to add, which you have not yet had the opportunity to say, regarding Transit Oriented Developments or higher density development in general?
- _OPEN-ENDED, PROBE_
- 1. Suggestion or comment (PROVIDE DETAILS BELOW)
- 2. Nothing further to add
- Q44 GENDER. Male ☐ Female ☐
- Q45 What age bracket are you in?
- 1. 18-24
- 2. 25-34
- 3. 35-44
- 4. 45-54
- 5. 55-64
- 6. 65-74
- 7. 74+
- Q46 HOUSEHOLD
- 1. Lone person household
- 2. Group household of related or unrelated adults
- 3. Young couple, no children
- 4. Older couple, no children at home
- 5. Couple or single parent with mainly pre-school children
- 6. Couple or single parent with mainly primary-school children
- 7. Couple or single parent with mainly teenage children
- 8. Couple or single parent with mainly adult children still living at home

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▪ Q47 EMPLOYMENT STATUS

1. Part-time employment
2. Full-time employment
3. Unemployed
4. Home duties
5. Pensioner (non-age pension)
6. Retired / age pensioner
7. Student
8. Refused

▪ Q48 OCCUPATION

1. Manager / administrator
2. Professional
3. Associate professional
4. Tradesperson / related worker
5. Advanced clerical, sales & service worker
6. Intermediate clerical, sales & service worker
7. Intermediate production and transport worker
8. Elementary clerical, sales & service worker
9. Labourer / related worker

▪ Q49 HIGHEST EDUCATION LEVEL

1. High school
2. Trade/apprenticeship
3. Certificate/diploma
4. Bachelor degree
5. Master's degree or higher

Q50 POSTCODE □□□□

1. Q51 HOUSEHOLD'S GROSS ANNUAL INCOME

2. Less than \$25,000 per annum
3. \$25,000 to less than \$50,000
4. \$50,000 to less than \$75,000
5. \$75,000 to less than \$100,000
6. \$100,000 to less than \$150,000
7. \$150,000 to less than \$200,000
8. \$200,000 or more

▪ Q52 NATIONAL, ETHNIC OR CULTURAL HERITAGE MOST IDENTIFY WITH

1. Aboriginal / Torres Strait Islander
2. Australian
3. Australian-Chinese
4. Australian-English
5. Australian-Greek
6. Australian-Vietnamese
7. Australian-Irish
8. Australian-Italian
9. Australian-other
10. African
11. Asian
12. European
13. Middle Eastern
14. North American
15. South American
16. Other nation / ethnicity / culture

▪ Q53 THINKING ABOUT WHEN YOU MAKE REGULAR TRIPS AT LEAST 3 TIMES A WEEK, SUCH AS GETTING TO WORK, STUDY OR OTHER REGULAR DESTINATIONS AND BACK HOME AGAIN. WHICH ONE MODE OF TRAVEL DO YOU USE MOST OFTEN FOR THESE REGULAR TRIPS?"

- RANDOMISE, SR
1. Private car, as the driver
 2. Private car, as a passenger
 3. Drive to station/interchange, catch public transport (i.e. park 'n' ride)
 4. Bicycle
 5. Walk to destination
 6. Train
 7. Tram
 8. Bus
 9. Scooter or motor bike
 10. Paid private transport (e.g. taxi, hired driver)
 11. Don't make regular trips
 12. Other response

- Thank you again for your valuable input. Please click the submit button below.

APPENDIX C: Topic Guide – Focus Groups

8210 – HIGHER DENSITY DEVELOPMENT - MODERATORS GUIDE

- Background

- These four groups are a post-quantitative study to delve more deeply into issues which were raised during the telephone and online surveys to gain further insights.

- Group Specifications

- The specifications for each group are summarised below.
- Group 1 Tuesday 14 June 2011 HR, 69 Fullarton Rd Kent Town 6pm 18-29 year olds, gender balance, housing decision makers, mix of purchasers and renters, mix of low, medium & high socio-economic status (as in ABS Index of Socio-economic Advantage suburbs).
- Group 2 Tuesday 14 June 2011 HR, 69 Fullarton Rd Kent Town 8pm 30-44 year olds, gender balance, housing decision makers (either purchase or rent), mix of low medium & high socio-economic status (as in ABS Index of Socio-economic Advantage suburbs).
- Groups 3 Wednesday 15 June 2011 HR, 69 Fullarton Rd Kent Town 6pm 45-54 year olds, gender balance, housing decision makers (either purchase or rent), mix of low medium & high socio-economic Advantage (as in ABS Index of Socio-economic Status suburbs)
- Group.4 Wednesday 15 June 2011 HR, 69 Fullarton Rd Kent Town 8pm 55-69 year olds, gender balance, housing decision makers (either purchase or rent), mix of low medium & high socio-economic Advantage (as in ABS Index of Socio-economic Status suburbs).

- Preliminary information (5 mins)

- Housekeeping matters to go through before starting:
- Mobiles off.
- Toilets.
- Refreshments.
- Confidentiality of responses.
- No right or wrong answers.
- Video recording - purpose.
- Recruitment - and why.

- To participants

- *"In this group we'll be talking about the housing market and how Adelaide will meet the challenges of future development. In particular, we will talk about your perceptions of choices in housing, your preferences in terms of not just the built form but also the lifestyle you and your family require, as well as factors which influence your decision making now and into the future, regardless of whether you rent, own or are purchasing your home. We will focus on the home you live in, rather than investment properties."*

- Warm up & Introduction (5 mins)

- Firstly, go around the table and get everyone to introduce themselves
- first name and a little bit about themselves, e.g. their family and occupation.
- The type of housing they live in currently.

- Key issues in choosing a home (15 mins)

- What was most important to them when they first chose their current home?
- What other attributes or features of a home are important? PROBE
- Can they describe a house appropriate for the Australian way of life? Is this image still appropriate? Will it change for their children / grandchildren?
- How is the size of the built form important? Do they think their current home is the right size? Why / why not?
- How many bedrooms do they need? What other uses do they make of bedrooms? Do they have a separate study? How do they use spare rooms? Do they have more than one living area? Are these spaces fully utilised?
- How do pets fit into their home and lifestyle? Probe for: how many pets, space needs, indoor / outdoor, etc.? How do they exercise them?
- What do they really enjoy most about where they live?
- Are there aspects of an area they don't like or won't accept? What would they change / improve? Probe for:
 - ~ Character / heritage, block sizes
 - ~ Proximity to public transport / safe bike lanes or off-road bike paths
 - ~ Open space, parks, trees, streetscapes
 - ~ Proximity to - Shops, schools, public transport, employment, recreation / entertainment
 - ~ Traffic, congestion, traffic calming
 - ~ Sustainability, environmental or natural resource concerns – probe for attitude to former land use, contamination issues, remediation of land, how they trust that land is safe to live / raise a family.

8210 – HIGHER DENSITY DEVELOPMENT - MODERATORS GUIDE

▪ Affordability and price (10 mins)

- How does affordability factor into their decision making about housing? Does this include ongoing affordability (i.e. living expenses such as heating, cooling, water use, energy saving designs etc.)
- What, if any, trade-offs do they make to ensure their housing is affordable? Probe for sacrificing quality, size, location etc.
- Have they any thoughts on affordability in, say, 10 years' time? How will this impact on them or their children? How do they feel about this?

▪ Neighbourhood and community (15 mins)

- What is important to them about the local neighbourhood? Probe for access to shops, services, schools, work etc. What shared facilities do they use in their community (e.g. community hall, public library, oval or sporting facilities, training facility or university etc.)?
- Do they have open space nearby? How do they use the open spaces? Frequency? Whole family? Do they travel some distance to use parks and gardens? How far?
- Do they communicate with neighbours and, if so, how important is this to them? Does it enhance their lifestyle to have close neighbours? Why / why not? (include sound insulation, shared driveways, shared gardens, foyers, etc).

▪ Future vision (15 mins)

- What do they think Adelaide will look like in the future? Discuss aspects such as population, housing density, transport, infrastructure, climate change etc.
- Would the quality of life be different? Better or worse? Would they still be driving a private car to work or to access services? If not, how would they travel?
- What do they consider would be “good” public transport? PROBE
- If they were asked to plan for a projected increase in the local population, what would be their solution for housing?
- If they were able to design their ideal Adelaide, what would it be like? Where would they be living in this ideal place?
- What, if anything, does the term “liveable communities” mean to them?
- What does the term “mixed use” mean to them? What images does “light industrial” conjure? Would they live in an area where light manufacturing was nearby? Why / Why not?

▪ Lifestyle in future housing (20 mins)

- Bearing in mind that most people will be living similarly to the way they live now, that is in single detached housing on a medium sized block. So, let's look at some examples of what the future Adelaide might look like for those living in alternative housing.
- I would like you to look at a series of photographs of dwellings and, for each photograph I hold up and pass around, tell me what you see and what lifestyle the people living there are likely to have.
- NOTE: Repeat for each photo. Maximum of 6 lifestyle photographs, showing built form, transport solutions and social infrastructure like parks or playgrounds. One photo must show shop-top accommodation to test perceptions of living in this environment.
- Probe with questions about living close to public transport, what building materials should be used, how close should schools, universities, shops, and public transport be to encourage alternatives to using a car?

▪ Communications / Marketing (5 mins)

- How would they like to be kept informed about housing and development in future? Which websites or newspapers? Newsletters?

▪ Closing comments or suggestions (5 mins)

- Are there any further comments or suggestions they would like to make about future housing?

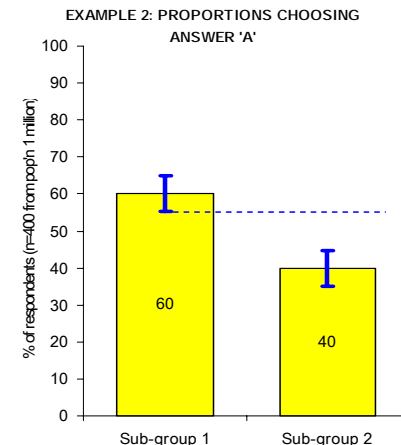
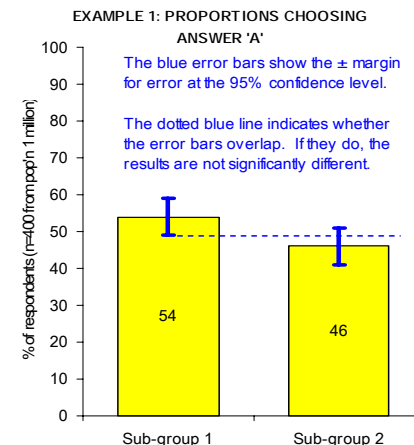
- THANK FOR PARTICIPATION AND CLOSE.

MARGIN FOR ERROR

- Because nearly all market and social research evaluates results based on population *samples*, rather than a census where everyone is consulted, there is an inherent degree of error in the results. However, if the sample obtained is a properly randomised section of the target population, there are statistical tests that will calculate the degree of accuracy for those results - known as the margin for error or confidence interval.
- Unfortunately for the layperson, there is no single figure that says, 'this is a statistically significant difference'. The factors that go into the calculation of statistical differences include:
 - ~ **population size** - the total number of people in the target audience, not in the whole population. For example, if an organisation were researching its casual staff's views on weekend work, the 'population' would be the total number of casual staff.
 - ~ **sample size** - the number of respondents, or people taking part in a survey.
 - ~ the **desired level of confidence** in the result - for example, a 95% confidence level simply means that, if we ran the identical survey and sampling methodology 100 times, you would expect to get a result within the calculated margin for error 95 times out of 100.
 - ~ the **proximity of the result to the midpoint**.
- This latter element (proximity to the midpoint) means that, regardless of sample or population size, a figure close to 50% is inherently less reliable than a figure close to 100%. As an example, if you wish to be 95% confident in the results for a population (N) of 1 million and a sample (n) of 400, a result of 50% would be subject to a $\pm 4.9\%$ margin for error. In other words, you could be 95% confident that the real result would be somewhere between 45.1% and 54.9%. However, with the same population, sample and 95% confidence level, a result of 90% saying yes or no would be subject to a margin for error of only $\pm 2.94\%$, i.e. the real result would be between 87.06% and 92.94%.
- The following graphs may illustrate more clearly the way margin for error works. In each case, we have calculated the confidence interval for the results. If the intervals overlap, then the differences are not statistically significant; if there is no overlap, they are reliably different.

INTERPRETING RESULTS:

- Fortunately, researchers no longer have to check every result manually; our statistical analysis software packages tell us when figures are statistically different from one another and at what confidence level. However, the skill of the trained researcher is in *interpreting* the results and considering context, not just checking the numbers.
- For example, suppose that significantly more people aged 65-74 were aware of advertising for a sports store than people aged 75-84. It is significant, but is it relevant - in the context of the product and its major target audience of, say; active people aged 15-54? It is critical to good analysis that we judge relevance and highlight the key issues, not waste clients' time by just regurgitating numbers that the computer says are statistically different.



APPENDIX D – REFERENCE LIST

The following books, papers and presentations were used to inform the development of the questionnaires for the Online and CATI surveys, as well as adding existing knowledge of Transit Oriented Development and related topics to the project. Only those referenced in-text were used in this report.

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