



SALISBURY TOWN CENTRE RENEWAL RESEARCH REPORT

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Project #: 8273

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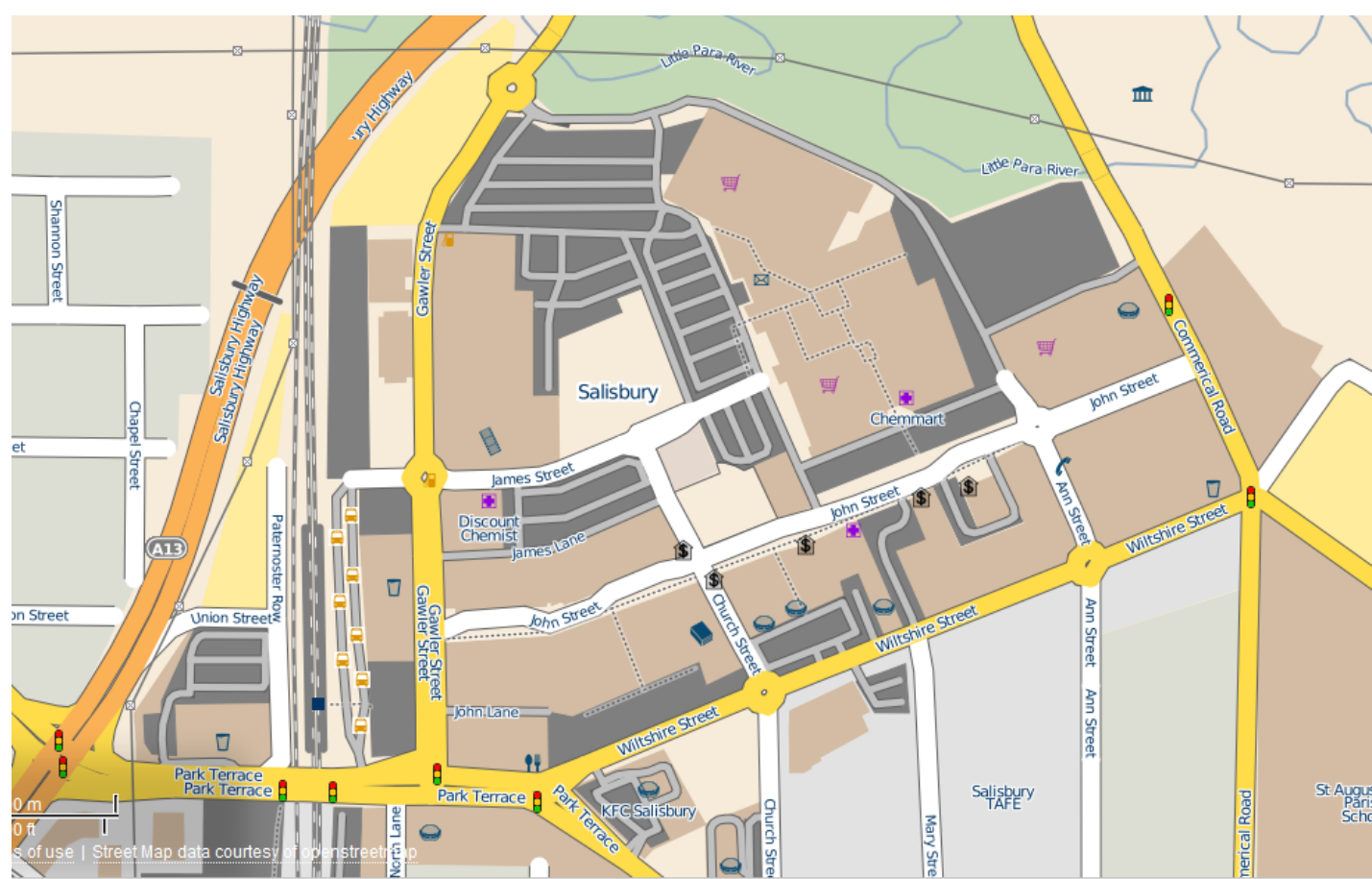
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Methodology overview

BACKGROUND:

- ❖ Council is in the process of developing a Master Plan for the STC, in line with the Salisbury Growth Action Plan. The Master Plan will seek to 'revitalise' the STC in a way that will address business and social development, as well as public infrastructure and access.
- ❖ As part of the early stages of information gathering so vital to developing an effective Master Plan, research was required to explore the public's current images, perceptions and usage of the area, as well as identify opportunities for improvement.
- ❖ Two methods were used to obtain this information; firstly, an Intercept survey of n=200 users of the STC to obtain initial data on where users come from and how they use the Centre.
- ❖ Interviewers were strategically located across the Centre and also varied the times they interviewed over a 5 day period and taking in one weekend. The purpose was to capture a range of users, not just those who shop at Parabanks or visit regularly. A bias inherent in this method is that it tends to over-sample frequent users. For this reason, a second survey was undertaken with a minimum quota of n=75 non-users as well as n=150 users.
- ❖ This second survey was undertaken by CATI (n=232), asking a range of residents in the catchment suburbs similar questions to those asked in the Intercept survey. It also included a number of questions specific to non-users to find out why they do not currently use the STC.
- ❖ The following report provides key findings for both phases of the research, as well as an overall summary.



Source: . www.salisbury.sa.gov.au

RESEARCH OBJECTIVES:

The objectives for the research can be summarised as surveying users and non-users of the STC, to identify:

- current usage patterns, for STC and its competitors.
- the drivers and barriers to usage.
- perceptions of and attitudes towards the STC and its competitors.
- potential changes that would increase usage.
- attitudes towards living within walking distance (in line with State and Local governments' increasing focus on TODs (transport oriented developments)).

Who we spoke to

▪ INTERCEPT SAMPLE

- The intercept survey was conducted first, to provide data from which the catchment area of users of the Salisbury Town Centre could be calculated for the telephone survey component.
- Four locations were selected as broadly representative of traffic flows in the area. A randomising technique of every 5th person (and only 1 person in each group) was used so that the sample included typical users of the centre.
- The profile of users surveyed included:
 - ~ A skew towards females (59% of the sample) and 65 plus year olds (33%)
 - ~ Less than half (46%) of respondents were in paid employment
 - ~ They were more likely to live in Salisbury North (14%), Salisbury (11%) Parafield Gardens (10%), and Paralowie (9%).



▪ CATI SAMPLE

- We included people aged 15 years and older, on the basis that from this age residents use (in particular) various specialty shops, take-away and the cinema and will therefore have views on how the area should develop in the future.
- Telephone numbers were drawn (by suburb) from the Electronic White Pages, randomised and we asked to speak with the person in the household, 15 years and older, who was the last to have their birthday. This technique is used to ensure that the first responder is not always the person interviewed.
- Nonetheless, the profile of users and non-users of the STC included:
 - ~ A skew towards females (62% of the sample) and a low number of residents under 25 years (this is common in CATI surveys as this segment are less likely to have a landline).
 - ~ Broadly representative of all age groups from 25 years and older.
 - ~ Live in the catchment area, including the suburbs mentioned above.



Executive Summary:

Overall summary, discussion and recommendations

Executive Summary

- ❖ The primary reason for visiting the Salisbury Town Centre (STC) was to **access shops and / or services** in the area. A similar proportion of those intercepted at the STC visited the other shops and services as visited Parabanks (25% and 22% respectively).
- ❖ **Business services, grocery shopping, health and beauty** services and **medical** services were the most common other activities undertaken in the STC (apart from the main reason for being there).
- ❖ One in ten respondents (both intercept and CATI) access the **cinemas** whilst at the STC.
- ❖ One in five of those intercepted was using the **Interchange** and 8% indicated they **work in the area**.
- ❖ Most respondents are regular visitors to the STC: 3 in 4 visitors intercepted and 1 in 2 telephoned visit **weekly or more often**. The proportion visiting other shops and services weekly or more often was similar to the proportion visiting Parabanks weekly or more often (62% and 58% respectively). This finding suggests that **Parabanks is not the only attraction to the STC for regular visitors**.
- ❖ Whilst **private car as the driver** is the most common mode of travel (72% of CATI & 43% of Intercept respondents), a third of those who were intercepted had travelled to the STC by **bus**. This suggests that regular visitors to the STC may also be users of the Interchange and then do shopping / access services.
- ❖ Two in every three respondents stay in the STC area for **less than 2 hours**.
- ❖ The standout attractions for STC users were twofold: **convenience** (such as accessibility and closeness) and the **range of shops / services** (including specialty shops). The atmosphere is only a minor driver of visitation. Having said this, motivation to use competitor centres showed only minor differences, with closeness and access being the key reasons for choice of centre.
- ❖ Respondents were not particularly enthusiastic about more activities and services in the STC, with around half having no particular suggestions, they were **happy with what was already available**. Among those who put forward suggestions, these tended to focus on the range of products and services available rather than on activities they could undertake. For example, more **specialty shops, department stores** and **fashion stores** were the top suggestions.
- ❖ In terms of the brand image of the STC, **convenient** was the most common individual response to describe the area. However, the brand image also included quite high incidences (when combined) of stating the STC was **unattractive, drab, outdated, congested, average, spread out** and **unsafe**.
- ❖ When it came to dislikes about the STC, the most commonly mentioned was **safety issues** (28% of intercept and 20% of CATI respondents). Having said this, however, safety was not strongly linked to the brand image (3% and 4% of mentions), which seems to suggest that safety is not top of mind but was raised only when “pushed”. This is supported by the finding that just 8 non-users cited safety as a reason for not using the STC.

Executive Summary

- ❖ The key suggestions for change raised were: **redeveloping Parabanks** and **more choice of shops**. Among users intercepted onsite, **streetscape** improvement, **more lighting** and **attractive areas to sit / play** were also raised (ranging from 16% to 10% of suggestions)
- ❖ The majority indicated they **would not live near** the Salisbury Town Centre (66% of CATI respondents and 53% of Intercept respondents said no).
- ❖ Having said this, a third (34%) of CATI respondents and nearly half (48%) of Intercept respondents said they **would consider housing near the STC**.
- ❖ There was evidence that a market exists for **affordable housing** located near to shops and services, particularly among those who were intercepted in the area rather than the CATI sample. After affordability, **convenient location** and **good design** were also considerations for those who tentatively indicated they would consider living near the STC.

Discussion

- ❖ In terms of how residents in the catchment perceive their local shopping centre, the research reveals a similar attitude and usage patterns as occurs in other local areas with shopping centres of a comparable size. The key focus for residents is on convenience and the product mix available.
- ❖ Any change in the mix of services and activities needs to focus on the motivations for using the centre. It provides a convenient and accessible service to local residents and is appreciated by users as a good facility with some areas they would like to see improved. Their suggestions revolve primarily around the range of services offered, with the aesthetic aspects of the centre being of secondary concern to current users.
- ❖ Among non-users, the motivations for using their current centre are also based around the convenience of the centre they use, rather than significant issues with the STC. This tends to suggest that improvements made to the existing STC are likely to improve the shopping / leisure experience for existing shoppers but are less likely to attract shoppers away from competitors, at least on a regular basis.
- ❖ This seems to indicate a need to provide something that is not available in competitor shopping centres. This may mean activities which are unique to Salisbury and which assist in developing a sense of belonging and community not currently available to Salisbury residents who shop regularly at other centres.

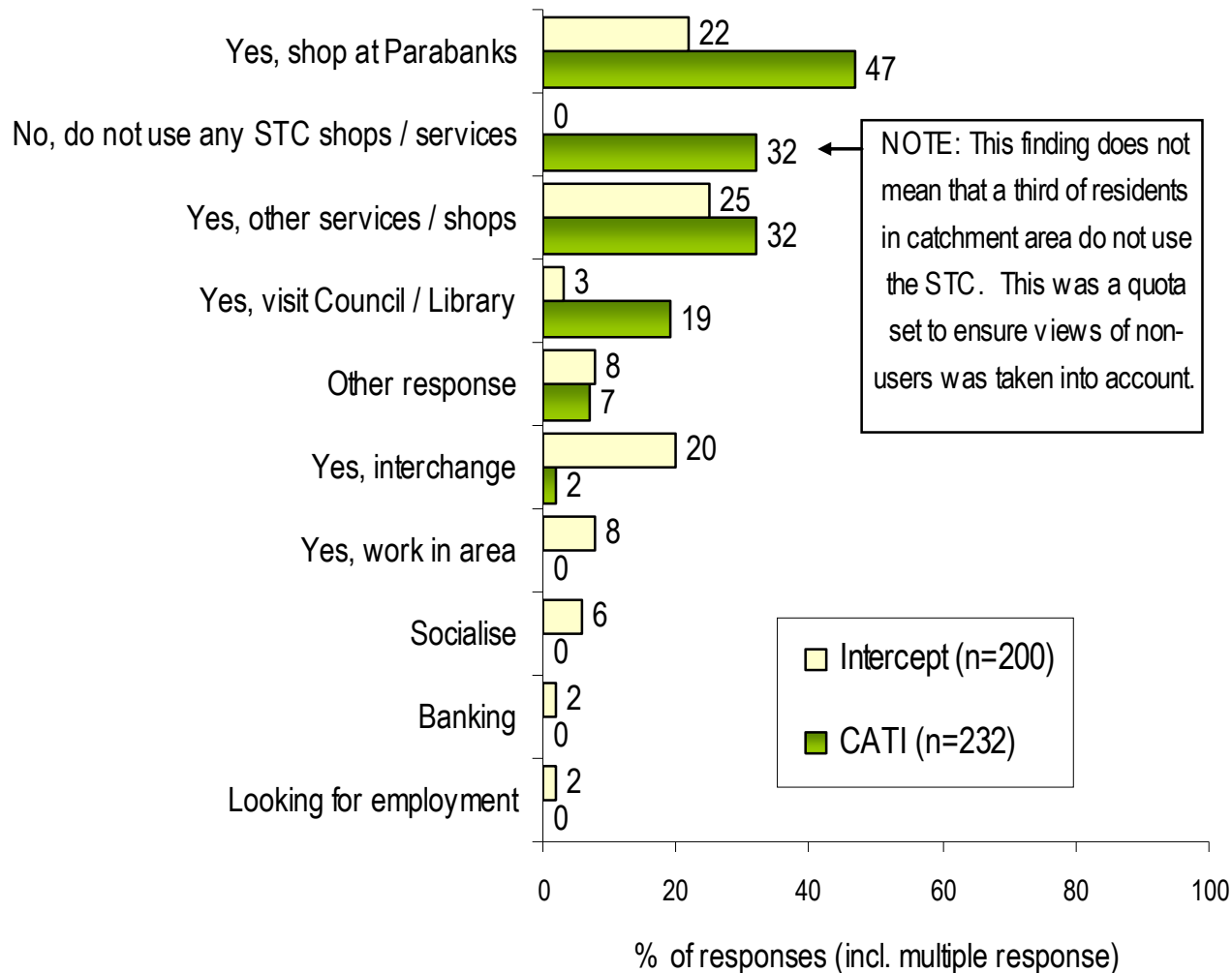
- ❖ The following recommendations / considerations are put forward as a means of stimulating discussion and also providing some concepts for testing throughout the remainder of the community engagement for the STC Renewal project.
 - ❖ The Salisbury Town Centre does not have its own identity / brand salience. As the Centre is somewhat “spread out”, it is not perceived as a town centre but rather as a series of shopping precincts. An example of this is the very low incidence of nominating Big W as a drawcard but a quite high incidence of stating the need for a department store (Target and Kmart were the most common suggestions). This suggests that Big W is perceived as not really part of the STC. It is therefore recommended that the name Salisbury Town Centre be highlighted in branded signage, using the STC logo to link the various elements which make up the Centre to represent an umbrella brand for the whole centre.
 - ❖ Further, the centre is primarily referred to as Parabanks, which has something of a negative connotation (for example, personal safety concerns). The Salisbury Town Centre brand could be used to create a positive community image of a vibrant and active centre or hub for Salisbury residents.
 - ❖ The Centre’s main drawcard is the shopping and services available, rather than a community-focused town centre. There appear to be few community events or activities held in the STC area and there are no play / recreation areas which will attract residents and encourage spending longer in the Centre area. A green, open space with shaded seating would provide a focal point for the centre to encourage uses other than primarily shopping.
 - ❖ There is also a relatively low incidence of users of the STC visiting the area on weekends. This possibly provides an opportunity to increase or enhance the activities already organised (such as the Saturday market) to encourage greater use of the Town Centre on weekends. A children’s play area with seating and shade was one suggestion put forward by regular users. As mentioned, there are limited opportunities currently for leisure / recreation / socialising in the STC. A play area is likely to increase the current use by encouraging users to either stay longer than 2 hours (the majority stay less than this) or to visit for other purposes than primarily for shopping / accessing services.
 - ❖ Users of the STC suggested that improving the streetscape, particularly the lighting, as well as providing seating and a safe play area were changes they would like to see implemented in the area. This suggestion needs to be tested among a wider range of Centre users.
 - ❖ It is recommended that continued engagement with residents be undertaken throughout the Renewal Project to ensure that concepts are tested among users of the Centre and their needs and wishes with regard to renewal are incorporated into the Plan. This will encourage residents to take “ownership” of the Salisbury Town Centre and its renewal. It will also generate interest in other aspects of the project, such as the proposed transit oriented development around the centre, giving local residents a stake in how their community develops and adapts to change.

Key findings: STC Behaviour Patterns

Use of STC

- Respondents who were intercepted whilst visiting the STC were asked the main reason they were in the STC on that occasion. Respondents who were telephoned were asked if they visit the Salisbury Town Centre and if so which services they access. Categories for responses were the same for each segment.

MAIN USE OF STC / MAIN PURPOSE IN VISITING STC

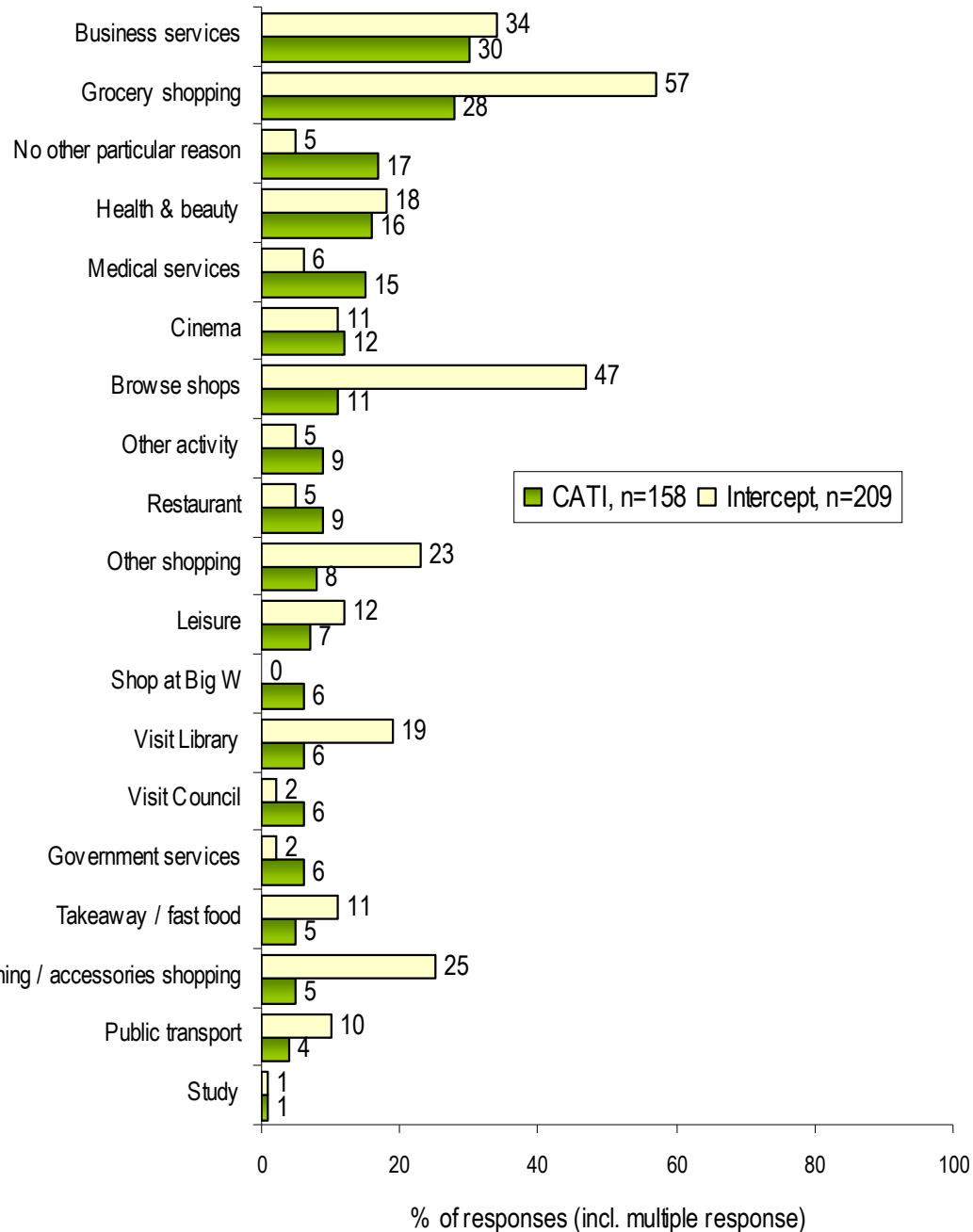


- The primary reason for visiting the STC was to access shops or services, either at Parabanks or other shops in the centre or on John Street (22% and 25% respectively).
- Among residents of the catchment area who were contacted by telephone, nearly 8 out of 10 visit the STC for shops and / or services.
- A fifth of those surveyed on site were using the interchange on that occasion.



Use of STC

OTHER ACTIVITIES USUALLY, SOMETIMES OR RARELY DO WHEN VISIT STC



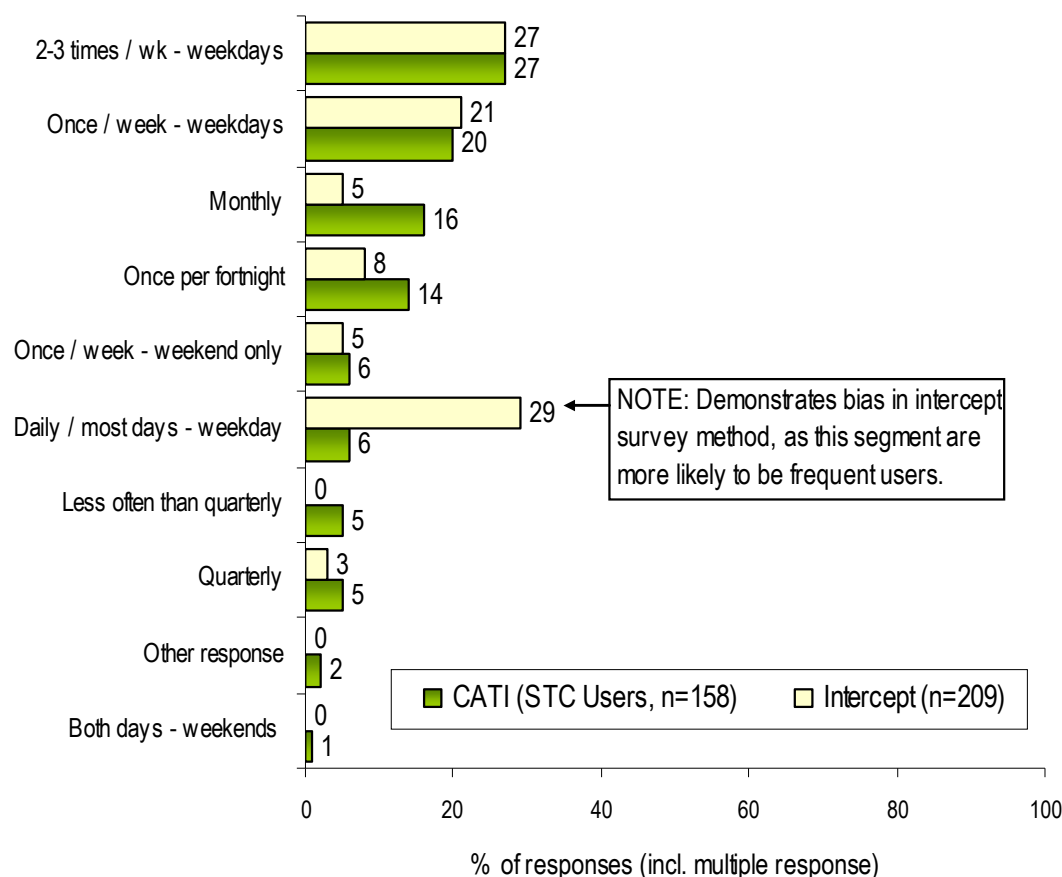
- Respondents were asked what other activities they usually, sometimes or rarely undertake whilst in the STC.
- Among respondents surveyed by telephone from the catchment area, the most common other activities included; business services, grocery shopping, health and beauty services and medical services.
- Among respondents intercepted while at the STC, the most commonly mentioned other activities were; grocery shopping, browsing, business services, clothing and accessories shopping, other shopping and visiting the library.
- Around 1 in 10 users of the STC access the cinemas whilst in the area.

Frequency of Visiting STC

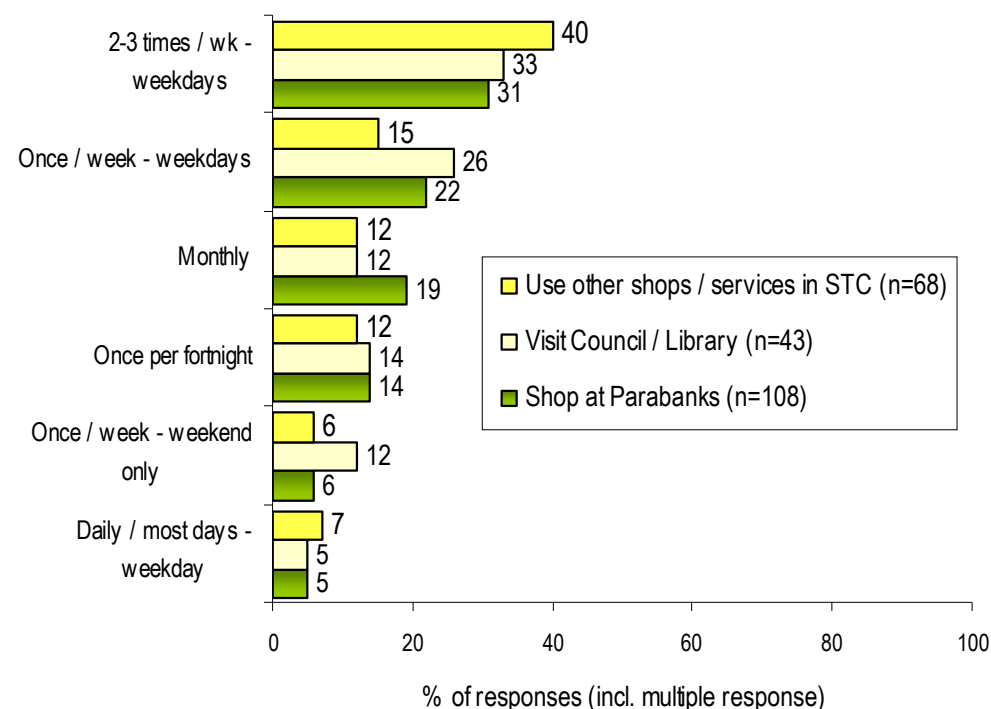
- Most respondents are regular visitors to the STC:
 - ~ Over half of residents in the catchment area visit weekly or more often.
 - ~ Three in four visitors intercepted in the STC visit weekly or more often.
- Few respondents across both surveys visit the STC on weekends only (around 5%).

- When the frequency is analysed by the main purpose of visits to the STC (among CATI respondents only, n=158 users of STC), the following points were noted:
 - ~ Although the number of users of the Council / Library is not high, they tend to be quite regular, with 2 out of 3 visiting weekly or more often.
 - ~ The proportion using Parabanks **at least once per week or more often** is similar to the proportion using other shops or services in the STC once a week or more often (58% versus 62% respectively). This finding suggests that Parabanks is not the only attraction for regular users of the STC.

FREQUENCY OF VISITS TO AREA



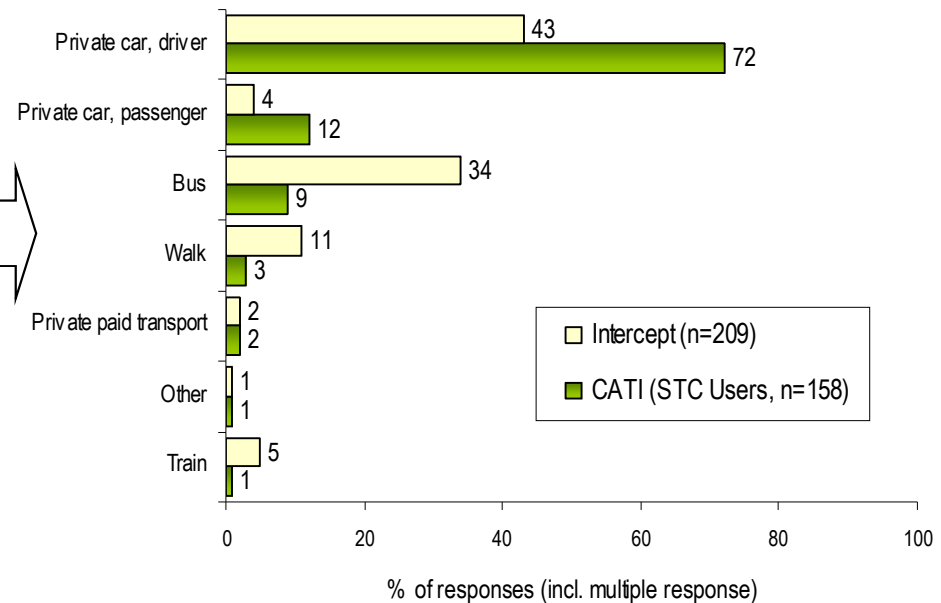
FREQUENCY OF VISITS BY MAIN PURPOSE OF VISITS TO STC (Main responses only, >5%)



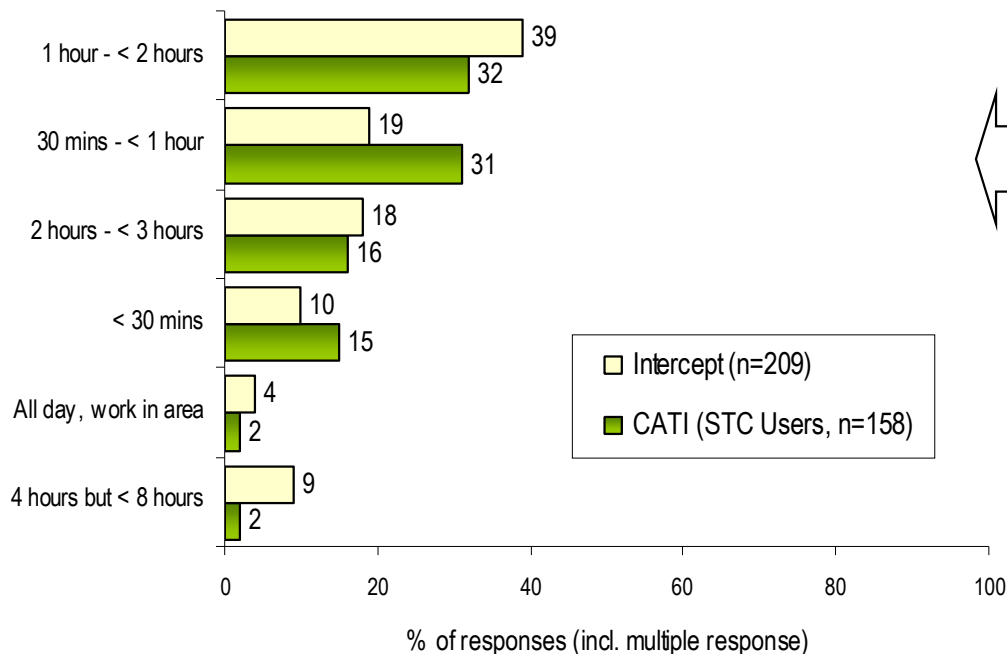
STC Visit behaviours

- The primary mode of travel to the STC is reportedly travelling by private car as the driver. Among respondents who work full-time, the proportion increases to 91%.
- However, among those intercepted across the STC, a third travelled there by **bus** and a further one in ten **walked**. This finding seems to suggest that regular visitors to the area are travelling from somewhere else (e.g. work and stop at STC on their way home) or live close enough to the STC to walk there regularly. This observation is predicated on the fact that intercept surveys are biased towards the most frequent visitors.
- Almost none of the respondents (across both surveys) travel to the STC by bicycle.

MODE OF TRAVEL TO STC



LENGTH OF STAY IN STC AREA



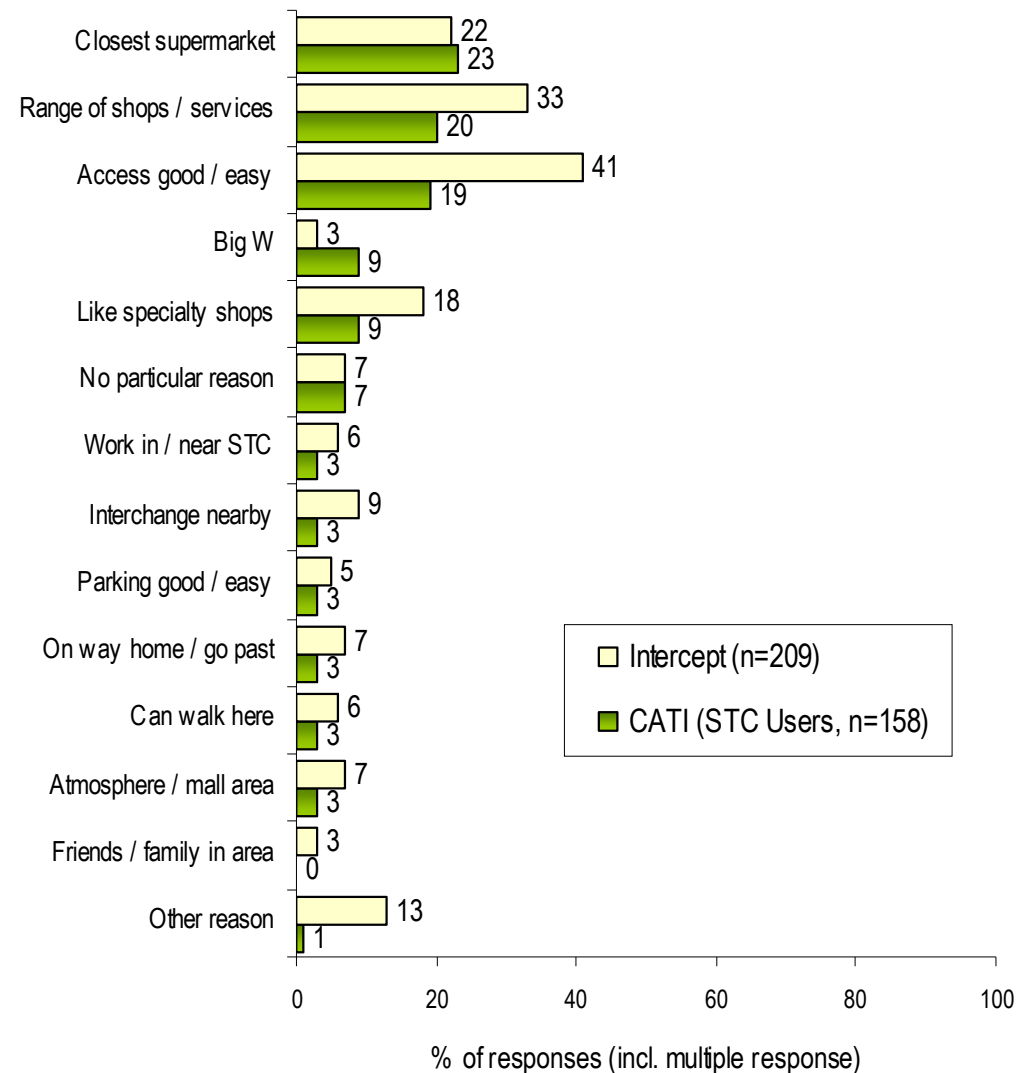
- Two in every three respondents stay in the STC area for less than 2 hours.
- Those intercepted at the STC, however, were more likely to spend longer in the centre (29% said they spend less than an hour at the STC versus 46% of those surveyed by telephone).
- Of interest was the finding that those who visit infrequently (monthly or less often), and also those who visit on weekends, were not more likely to stay longer than those who visit more regularly or during the week. Whilst this finding is not statistically significant, it may imply that the STC is a destination for specific tasks and does not encourage longer stays for leisure or recreation.

Key findings: Attitudes towards STC

- The key attractions to use of the STC revolve around the shopping / services available in the area as well as the Centre's accessibility:
 - ~ Access is good / easy
 - ~ Range of shops / services
 - ~ Closest supermarket
 - ~ Like the specialty shops
- There were no relevant, statistically significant variations in what attracted respondents to the STC, when analysed by socio-demographic or geographic profile.

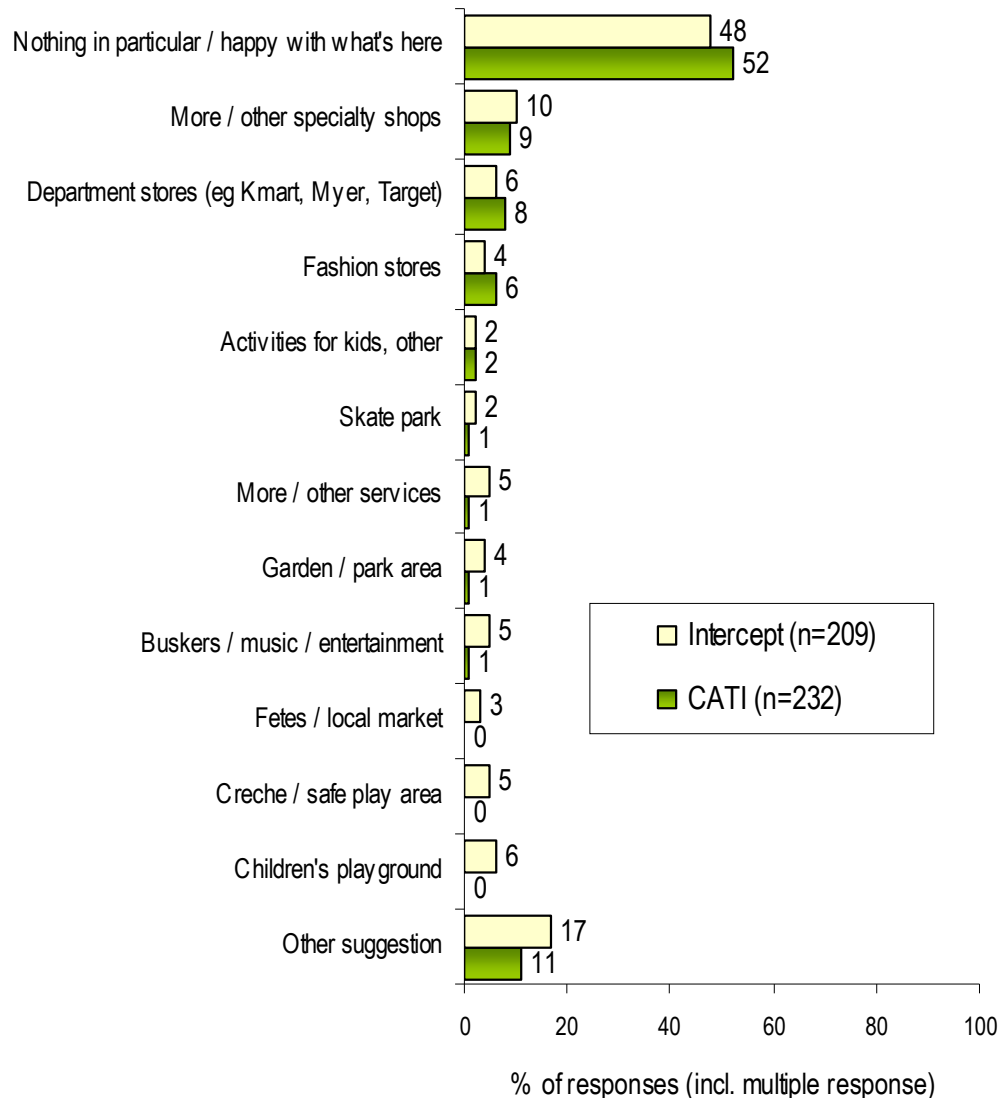


WHAT ATTRACTS THEM TO STC AREA



More Activities or Services in the STC

SUGGESTIONS FOR MORE ACTIVITIES / SERVICES IN STC

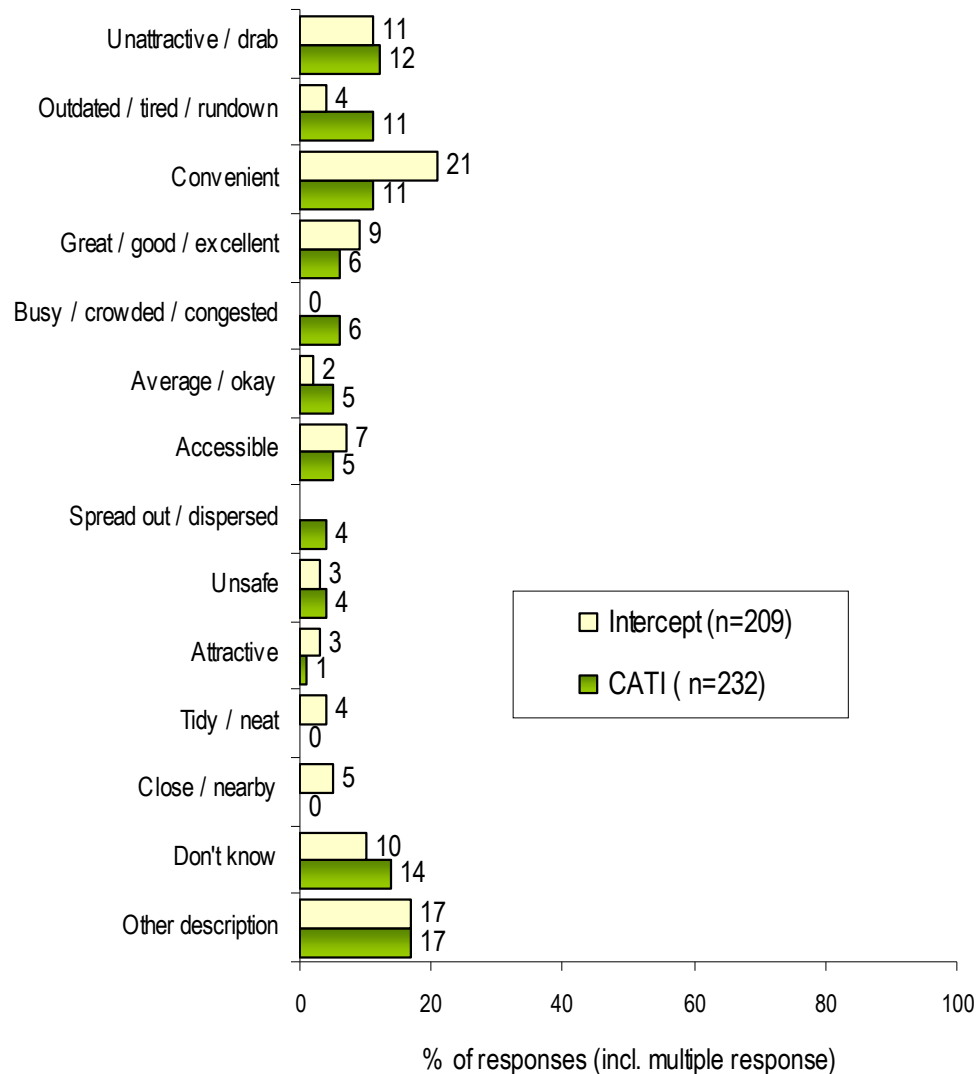


- Respondents were asked for their suggestions for more or other activities or services in the STC.
- About half of all respondents did not have any particular suggestions to put forward as they were happy with what is currently available at the STC.
- Respondents' focus tended towards the range of products available to them, rather than the type of activities they could undertake in the STC. For example, the top suggestions included:
 - ~ More or other specialty shops available
 - ~ Department stores such as Kmart, Myer and Target
 - ~ Fashion stores.
- Small proportions of respondents suggested activities such as buskers or other entertainment, gardens or children's activities or play areas. A playground was the most often mentioned activity-based suggestion.



Brand Image of the STC

ONE WORD TO DESCRIBE STC



- Respondents were asked to indicate what one word they would use to describe the Salisbury Town Centre.
- Interestingly, those who were at the STC tended to be more positive than those who were surveyed by telephone, when it came to describing the STC's brand image. They were more likely to state the STC was convenient, great / good, accessible, attractive and neat / tidy
- Conversely, those surveyed by telephone were more likely to use images like unattractive, outdated, congested, average, spread out, and unsafe.
- Whilst convenient was the most frequently used description of the STC, a common image was that the STC was unattractive, drab and outdated (23% of CATI respondents and 15% of Intercept respondents used words such as these to describe the STC).
- Those who shop at Parabanks or access Council / Library services showed a relatively high incidence of stating that the STC was convenient (17% and 21% respectively, CATI respondents).

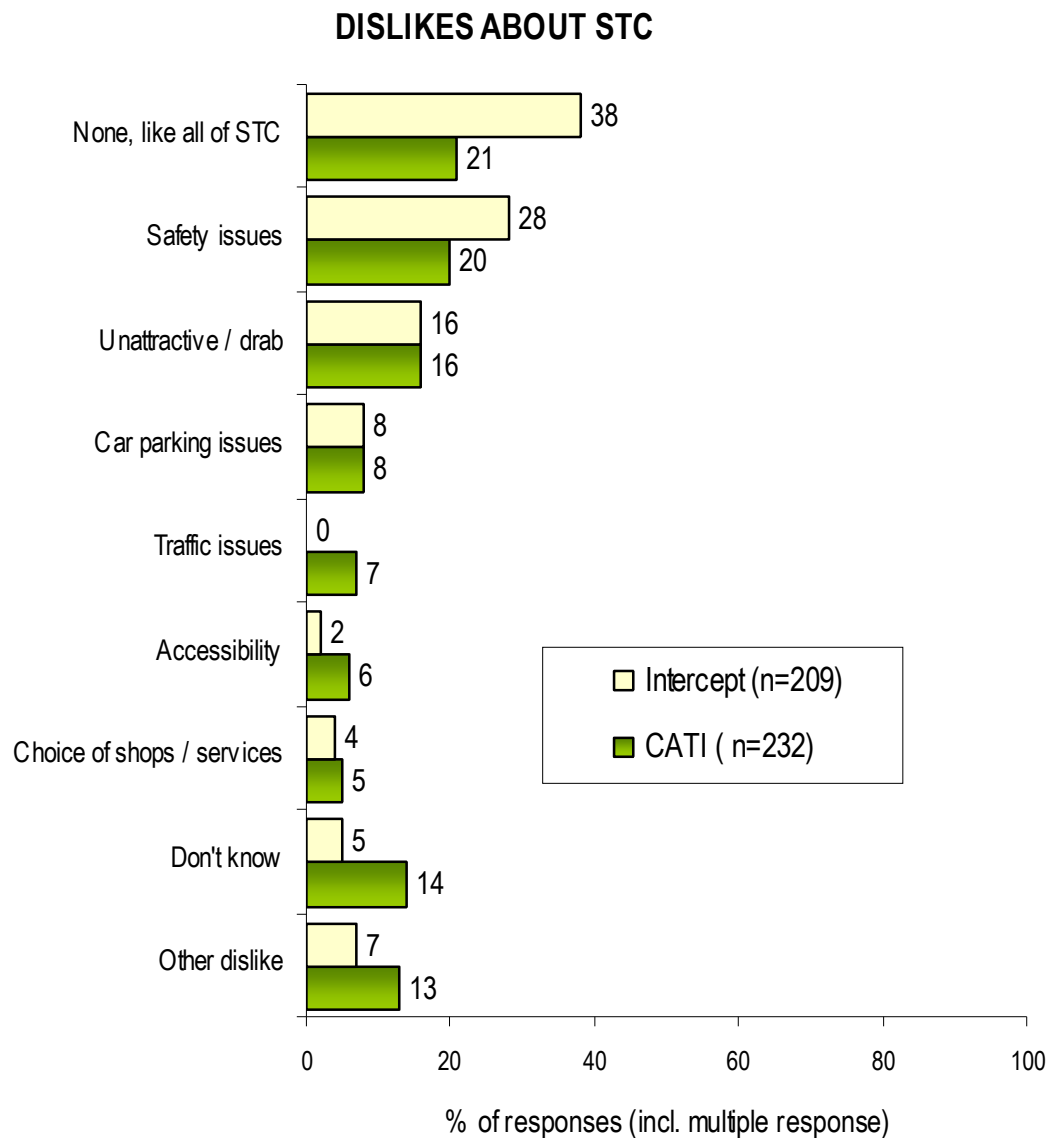
Brand image of STC

- The diagram below demonstrates the brand image in terms of frequency of mentions. The larger a word is displayed, the more frequently it was said by respondents.
- It shows that the positive images outweighed negative ones, with images such as good, tidy, excellent, clean, friendly, quiet and great being prominent.
- Having said this, it is also considered to be somewhat outdated and tired.



Dislikes about the STC

- When asked what they dislike about the STC, more than one in three Intercept respondents and one in five CATI respondents indicated there was nothing they dislike about the area, they like all of the STC.
- The most frequently raised concern was safety issues (28% and 20% of mentions). However, this issue was not strongly linked to the STC brand (as noted in the previous two pages with just 3% and 4% mentioning this issue), suggesting that concern for safety is a perception rather than a reality. This is supported by the finding that just 8 respondents (CATI sample, representing 11% of non-users of STC) said they do not use the STC due to safety concerns.
- The next two commonly raised dislikes were that the STC is unattractive / drab (16% of dislikes) and car parking issues (8%). There is clearly a message that redevelopment of the STC, and in particular Parabanks Shopping Centre, is due.



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NOTE: People on site able to visualise potential change more easily, than those surveyed by telephone.

| Suggestion | Intercept (n=209) | CATI (n=232) |
|-----------------------------------|-------------------|--------------|
| Don't know | 38 | 44 |
| Redevelop Parabanks | 13 | 13 |
| More shops | 12 | 12 |
| Traffic management | 0 | 6 |
| More security / monitoring | 6 | 6 |
| Restaurant / café / bistro | 5 | 6 |
| Easier to access | 1 | 5 |
| More choice of shops / fresh food | 5 | 5 |
| Too spread out | 0 | 3 |
| More parking | 1 | 3 |
| Streetscape / walking paths | 13 | 3 |
| More lighting / safer | 16 | 3 |
| Attractive areas to sit / play | 10 | 3 |
| Entertainment space | 3 | 3 |
| Market / central square | 2 | 2 |
| Better links with John St shops | 1 | 2 |
| Outdoor café / eating space | 3 | 1 |
| Children's play areas | 6 | 1 |
| Better public transport / buses | 3 | 0 |
| Other suggestion | 19 | 9 |

% of responses (incl. multiple response)

Key findings: Non-users of the STC

Reasons for not using the STC

- Among those surveyed by telephone who indicated that they do not use the STC (n=74 of the sample, as per quota set), the main reason for not using the STC was that the supermarket they use is closer / more convenient for them (38%).
- No reason to go to the STC and a perception that the STC is difficult to access were the next most common reasons for not using this centre (20% and 16% respectively).
- Note that just 1 in 10 non-users cited safety concerns as their reason for not using the STC (representing 8 people).

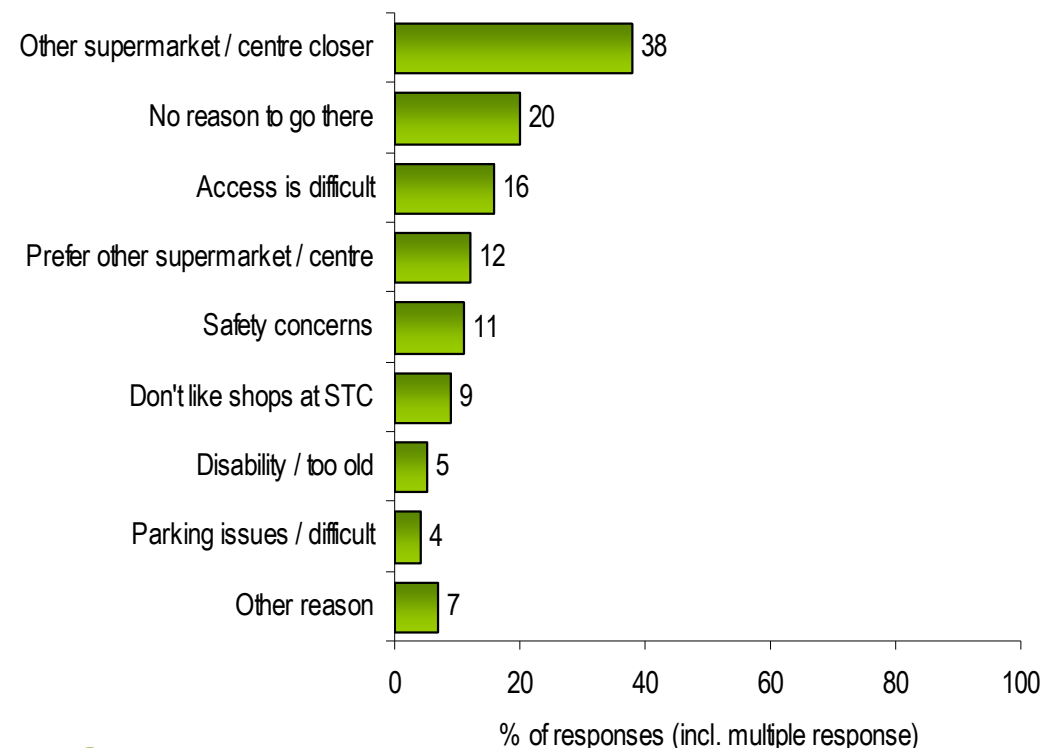
Q8 WHICH CENTRES USED INSTEAD OF STC

(BASE: Non-STC users only, n=74)



Q7 WHY DO NOT USE STC

(BASE: Non-users only, n=74)



Shopping Centres used

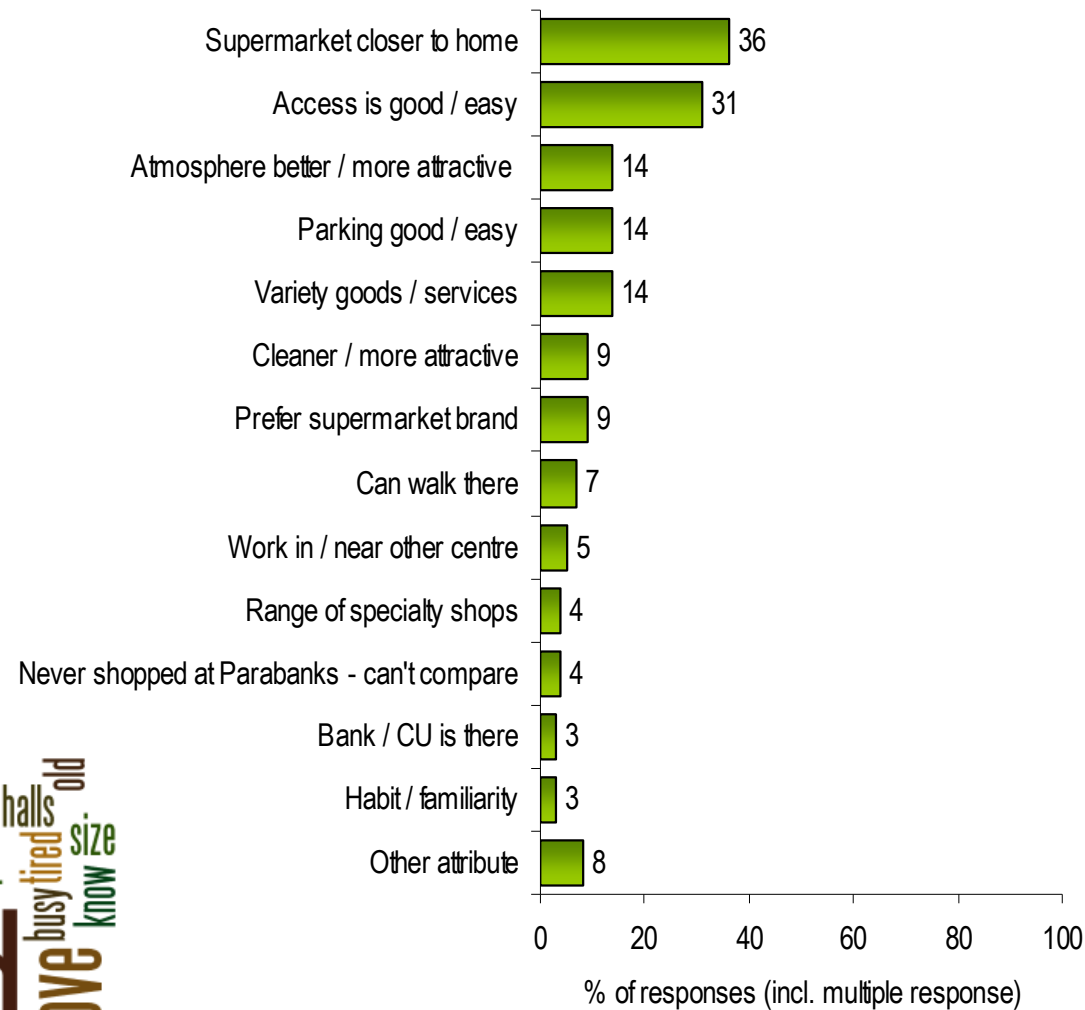
- The most commonly used centres were Golden Grove, Hollywood Plaza and Elizabeth City Centre (22%, 20% and 14% respectively).
- We know from the findings that convenience is a primary motivator of choice of shopping centre and this was confirmed in the recent Salisbury Neighbourhood Centre research. Among non-users, the motivations for using their current centre are based around the convenience of the centre they use rather than significant issues with the STC.

Attributes of main centre used

- The primary motivation in using an alternative shopping centre to Parabanks is convenience:
 - ~ Closer to home (36%)
 - ~ Access is good / easy (31%)
- The atmosphere / attractiveness is a motivator for a smaller proportion (14%), on par with easy parking and the variety of goods / services available.
- As the diagram below shows, some of the other attributes include the main centre used has a Foodland, shopping is a better experience and it is safer and well planned rather than crowded compared with their perception of Parabanks.



(BASE: Non-STC users only, n=74)

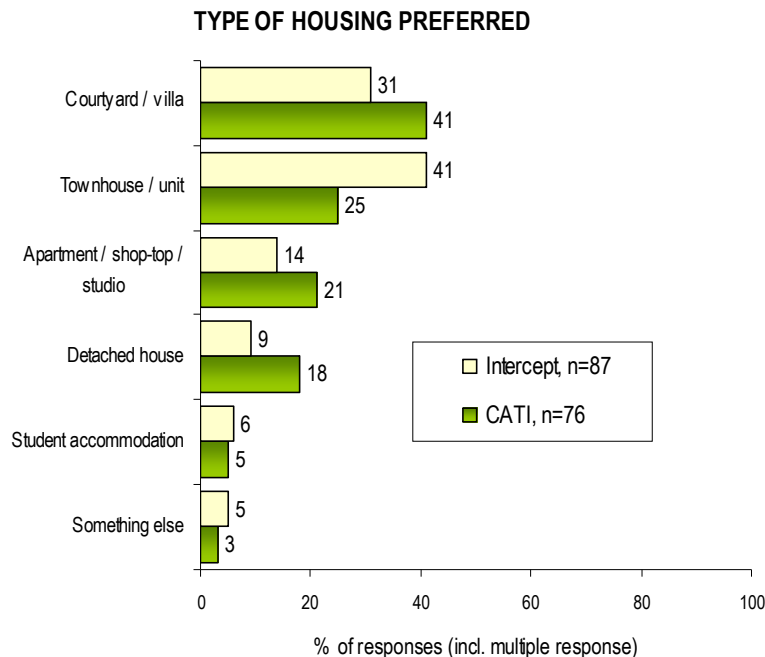


Key findings: Accommodation in the STC

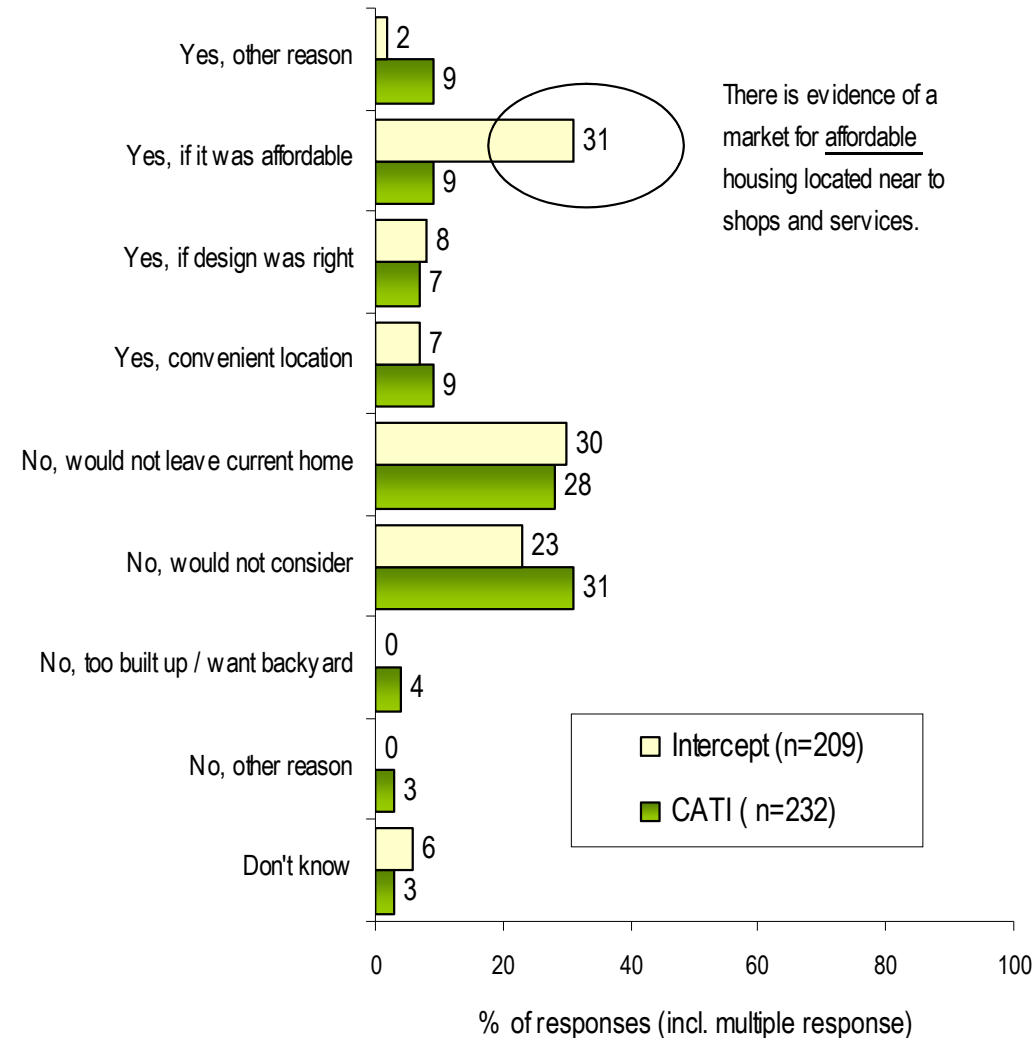


Housing preferences

- The majority indicated they would not live near the Salisbury Town Centre (66% of CATI respondents and 53% of Intercept respondents said no).
- Having said this, a third (34%) of CATI respondents and nearly half (48%) of Intercept respondents said they would consider housing near the STC.
- There is evidence that a market exists for affordable housing located near to shops and services, particularly among Intercept respondents (31% said they would consider affordable housing near the STC). The key emphasis was on affordability of any housing developed in this location. Note that the Intercept respondents tended to be representative of a broader range of ages and less likely to be 65 years or older. This tends to suggest that older people are less likely to consider changing their housing to higher density to live nearer to services and transport.
- After affordability, convenient location and a good design were also considerations.



HOUSING PREFERENCES NEAR STC



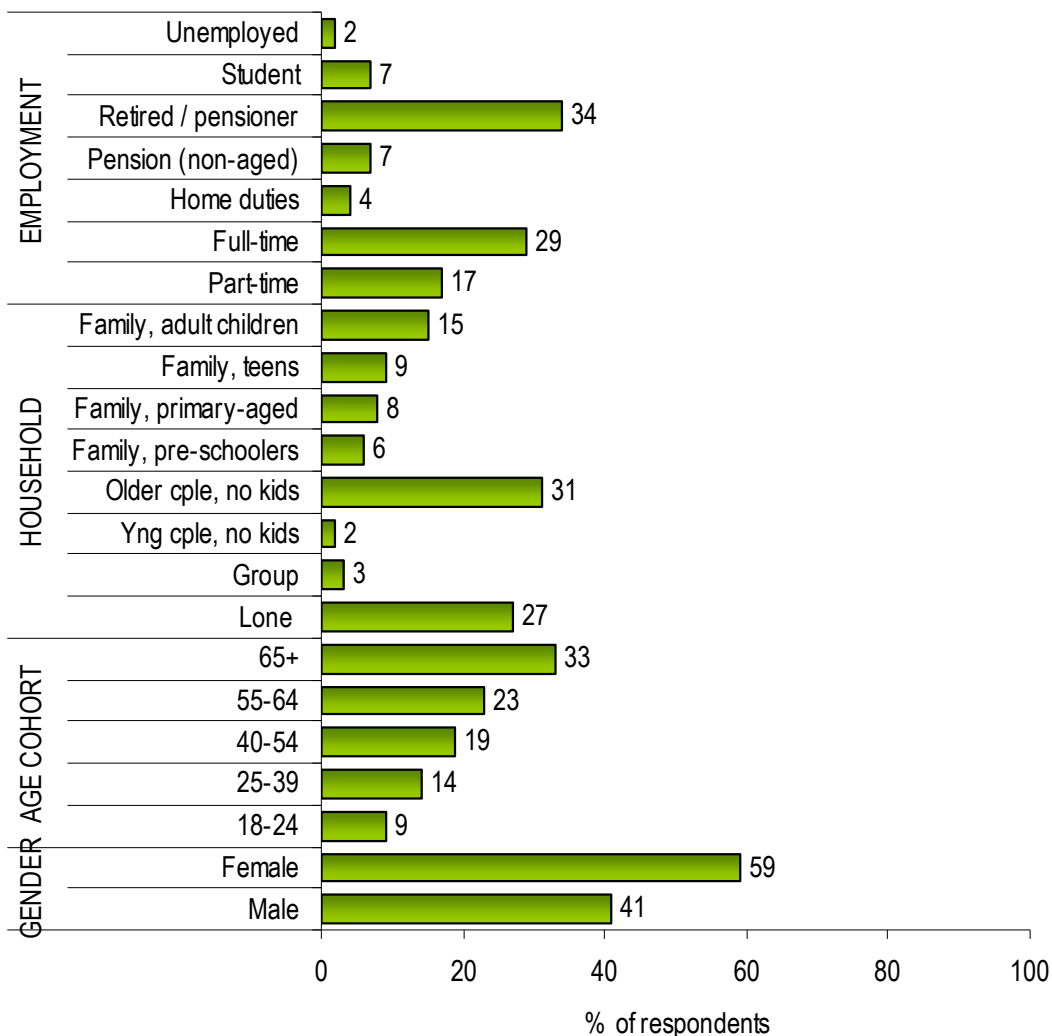
- Among those who indicated they would consider housing near to the STC, the most popular housing types were courtyard / villa and townhouse / unit.
- Student accommodation was the least popular housing type mentioned. Relatively small proportions said they would want a detached house at this location, below the proportion nominating shop-top / apartment / studio. This finding suggests that respondents are relatively pragmatic about what type of housing could be built at this location.

Appendix A: Demographic Profile

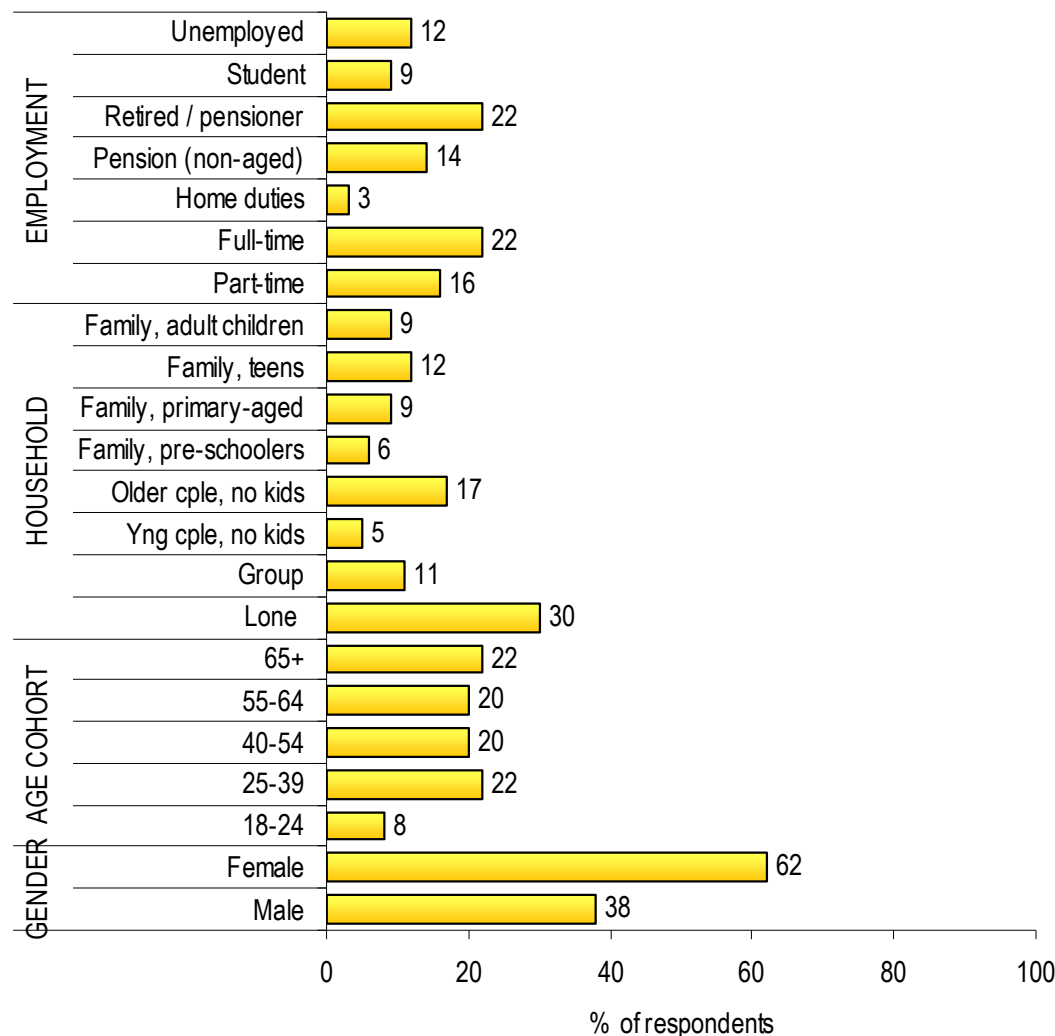
Demographics

- As is often anticipated with a random CATI survey which is not stratified, people aged 65 years and over and also females tended to be more highly represented in this sample. On the other hand, the Intercept sample captured relatively even proportions by age (25 years and older) but was also skewed towards females. The only quota on the Intercept sample was to include a minimum of n=75 non-users of the STC. Note that only 1 in 3 intercepted at the STC is in a family household with children.
- Otherwise, the samples are broadly representative of users of the STC (the intercept times and locations were varied to obtain a sample of users of different services within the STC) and residents within the catchment area who are either users or non-users of the STC.

SOCIO-DEMOGRAPHIC PROFILE - CATI SAMPLE (n=232)



SOCIO-DEMOGRAPHIC PROFILE - INTERCEPT SAMPLE (n=209)



Appendix B: Survey Instrument

Note: CATI version shown as example, as it contained the same questions as the Intercept survey and also included three additional questions asked only of non-users of Parabanks.

CATI VERSION

"Good morning/afternoon/evening, my name is _[Q0IV]_ from Harrison Research. We are conducting a survey about the Salisbury Town Centre, on behalf of the City of Salisbury. In the process, we are speaking with a random selection of people who live in the Salisbury area to find out if, and how, they use the Salisbury Town Centre and their suggestions for improving the area to attract people or to encourage them to use it more often and for different options.

INTERVIEWER NOTE: IF THEY SAY THEY DON'T USE THE SALISBURY TOWN CENTRE OR THEY DON'T KNOW WHERE IT IS, WE WOULD STILL LIKE TO SPEAK WITH NON-USERS SO TRY TO ENCOURAGE THEIR PARTICIPATION IN THE SURVEY. THERE ARE QUOTAS FOR NON-USERS.

_ IF NECESSARY, SAY:_ This is genuine research and I guarantee we are not trying to sell you anything.

SCREEN 1: Do you work in market research or have an association with the City of Salisbury Council, either as an employee or elected member? IF YES, THANK AND END

Is there anyone living in this household aged 15-24? _IF YES, ASK TO SPEAK WITH THEM OR ARRANGE CALLBACK - IF MORE THAN ONE, ASK FOR ONE WITH LAST BIRTHDAY - RE-INTRODUCE AS REQUIRED_

IF NO Please may I speak to the person in the household, aged 15 and over, who was the last to have a birthday? _REINTRODUCE OR CALLBACK AS NECESSARY_"

"The survey will take between 6 and 8 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 of local residents as possible.

IF CONCERNED ABOUT PRIVACY I assure you that any information you give will remain confidential. Any identifying information is removed before we analyse the results. No one's individual answers can be passed on to our clients or anyone else.

May we begin? Thank you."

START

USE OF SALISBURY TOWN CENTRE.

"Do you ever have reason to visit the Salisbury Town Centre, regardless of whether or not you shop at Parabanks?" Which services do you access?

UNPROMPTED, MR

1. Yes, shop at Parabanks
2. Yes, visit Council offices or Library
3. Yes, visit other services or shops in the STC area (e.g. Cinema, John Street shops / businesses etc)
4. Yes, use the interchange
5. Yes, work in the area / nearby
6. No, do not use any shops or services at Salisbury Town Centre]Q7
7. Other (SPECIFY Q101)
8. Don't know / can't say

IF 6 IN Q1, JP TO Q7

GO Q2

Q101 USE OF SALISBURY TOWN CENTRE OTHER

OTHER REASONS FOR VISITING AREA.

"Is there anything else you usually, sometimes or rarely do on visits to the Salisbury Town Centre?"

UNPROMPTED BUT PROBE, MR

1. Browse through shops
2. Business services (e.g. banking, bill paying, Post Office etc.)
3. Cinema complex
4. Clothing and Accessories shopping
5. Government services (e.g. employment, Centrelink etc.)

Q2 CONTINUED

1. Grocery shopping
2. Health and Beauty (e.g. chemist, hairdresser, cosmetics etc.)
3. Homewares / Lifestyle goods
4. Leisure (e.g. have coffee, socialise, gym)
5. Medical services / medical centre
6. Other shopping
7. Public transport
8. Restaurant
9. Study (includes TAFE, music college etc)
10. Takeaway / fast food stores
11. Visit Council Offices
12. Visit Library
13. Work in the area / nearby
14. Other (SPECIFY Q201)
15. No particular reason

Q201 OTHER REASONS FOR VISITING AREA OTHER

FREQUENCY OF VISITS TO AREA.

"How often do you usually visit the Salisbury Town Centre area?"

UNPROMPTED BUT PROBE, MR (I.E. CAN BE DAILY WEEKDAYS AND WEEKEND ETC.)

1. Daily / most days - weekday
2. Two or three times per week / weekdays
3. Once per week / weekdays
4. Once per week / weekend only
5. Both days on the weekend
6. Once per fortnight
7. Monthly
8. Quarterly
9. Less often than quarterly
10. Other (SPECIFY Q301)

Q301 FREQUENCY OF VISITS TO AREA OTHER

MODE OF TRAVEL TO AREA.

"How do you usually travel to the Salisbury Town Centre?"

UNPROMPTED, SINGLE RESPONSE ONLY

1. Bicycle
2. Bus
3. Community bus
4. Paid private transport (e.g. taxi, hired driver)
5. Private car, as driver
6. Private car, as passenger
7. Scooter / motor bike
8. Train
9. Walk
10. Other (SPECIFY Q401)

Q401 MODE OF TRAVEL TO AREA OTHER

LENGTH OF VISITS TO AREA.

"And how long do you usually stay whilst at this location?"

UNPROMPTED, SR

1. Less than 30 minutes
2. 30 minutes to less than one hour
3. One hour to less than two hours
4. Two hours to less than three hours
5. Four hours but less than eight hours
6. All day – work in the area
7. Varies (SPECIFY Q501)
8. Other (SPECIFY Q502)

Q501 LENGTH VARIES OTHER

Q502 LENGTH OF VISITS TO AREA OTHER

WHAT ATTRACTS THEM TO AREA

"What is it that attracts you to the Town Centre area?"

UNPROMPTED, MR

1. Access is good / easy to get to

1. Atmosphere / open mall area
2. Can walk here
3. Closest supermarket to home
4. Like the specialty shops available
5. On the way home / go past the Salisbury Town Centre
6. Parking is good / ease of parking
7. Range of shops / services here
8. Public transport interchange nearby
9. Work in / near the Town Centre (e.g. work in Parabanks, Other shops nearby etc.)
10. Other reason (SPECIFY Q601)
11. No particular reason

Q601 WHAT ATTRACTS THEM TO AREA OTHER

JP Q10

IF NOT USE PARABANKS, GO Q7

ELSE, GO Q10

WHY NOT SALISBURY TOWN CENTRE

"Why is it that you choose not to visit the Salisbury Town Centre?"

UNPROMPTED MR

1. Access is difficult
2. Don't like the shops at Salisbury Town Centre
3. No reason to go there
4. Other supermarket / centre is closer
5. Parking issues / difficult
6. Prefer other supermarket
7. Safety concerns
8. Other reason (SPECIFY Q702)
9. No particular reason

Q701 NOT STC OTHER

WHICH CENTRES USED FOR F&G SHOPPING

"Where do you usually do your food and grocery shopping?"

UNPROMPTED MR

City

1. Elizabeth City Centre
2. Fairview Park SC
3. Gepps Cross Homemaker / IGA
4. Golden Grove SC
5. Greenwith SC
6. Hollywood Plaza
7. Ingle Farm SC
8. Internet shopping only
9. Munno Para SC

12. St Agnes SC
13. Tea Tree Plaza
14. Other centre (SPECIFY Q801)
15. No preference / varies

Q801 WHICH CENTRES USED OTHER
ATTRIBUTES OF MAIN CENTRE USED

“Thinking about where you do most of your food and grocery shopping, what is it about that shopping centre which makes it better than Parabanks?”

UNPROMPTED MR

1. Access is good / easy to get to
 2. Atmosphere is better / more attractive surroundings
 3. Bank / credit union is there
 4. Can walk there
 5. Cleaner / more attractive
 6. Closest supermarket (e.g. to home, school, work etc)
 7. Habit / familiar with centre
 8. Prefer the supermarket brand
 9. Parking is good / ease of parking
 10. Range of specialty shops available
 11. Variety of goods and services
 12. Work in / near the centre (e.g. work in TTP or Elizabeth etc.)
 13. Never shopped at Parabanks - can't compare
 14. No particular reason
 15. Other reason (SPECIFY Q901)
- Don't know / can't say

Q901 ATTRIBUTES OF MAIN CENTRE OTHER

Q9A READ OUT: THE REMAINDER OF QUESTIONS DISCUSS POTENTIAL

IMPROVEMENTS TO THE SALISBURY TOWN CENTRE AREA. WE WOULD
VALUE YOUR OPINION, EVEN THOUGH YOU DO NOT USE THE CENTRE
CURRENTLY. PLEASE BEAR WITH US AND ANSWER THE FOLLOWING
QUESTIONS AS BEST YOU CAN.

MORE ACTIVITIES / SERVICES IN AREA

“What, if any, other activities or services would you like to see in this area which would attract you to use it OR to use it more often?”

UNPROMPTED, MR

1. Activities for kids / more things for children to do (SPECIFY Q1001)
2. Art displays / local art space
3. Buskers / music / entertainment
4. Children's crèche / safe play area
5. Fetes / local market on weekends
6. Garden or small, shaded park for rest and recreation
7. Local meeting space / public hall
8. More shops / other specialty shops (SPECIFY Q1002)
9. More services / other services (SPECIFY Q1003)
10. Open air concerts

11. Skate park
12. Other suggestion (SPECIFY Q1004)
13. Nothing in particular / happy with what is here

ONE WORD TO DESCRIBE STC

“Thinking about the Salisbury Town Centre as a whole, not just the shopping centre, Council offices or the bus interchange. What ONE word do you think best describes the Salisbury Town Centre?”

UNPROMPTED, SINGLE RESPONSE ONLY

1. Accessible
2. Attractive
3. Convenient
4. Close / nearby
5. Unattractive / drab
6. Unsafe
7. Other description (SPECIFY Q1101)
8. Don't know / can't say

Q1101 ONE WORD DESCRIPTION OTHER

DISLIKES ABOUT STC

“And still thinking about the Salisbury Town Centre as a whole, are there any aspects you don't like?”

UNPROMPTED, MR

- Accessibility (SPECIFY Q1201)
- Car parking issues (SPECIFY Q1202)
- Choice of shops / services (SPECIFY WHICH Q1203)
- Safety issues (SPECIFY Q1204)
- Unattractive / drab (SPECIFY Q1205)
- Other dislike (SPECIFY Q1206)
- Don't know / can't say
- None, like all of it

Q1201 ACCESSIBILITY OTHER

Q1202 CAR PARKING OTHER

Q1203 CHOICE SHOPS/SERVICES OTHER

Q1204 SAFETY ISSUES OTHER

Q1205 UNATTRACTIVE OTHER

Q1206 DISLIKES ABOUT STC OTHER

SUGGESTIONS FOR CHANGE STC

“If given the opportunity, how would you change the Salisbury Town Centre to better meet your needs?”

UNPROMPTED, MR

1. Better links with John Street shops
2. Better choice of shops / fresh food
3. Children's play areas
4. Easier to access
5. Entertainment space

6. Market or central square
7. More attractive areas to sit or play
8. More lighting / make safer
9. Not enough shops / prefer more shops
10. Outdoor café / eating space
11. Parabanks redeveloped / upgraded
12. Streetscape or walking paths
13. Restaurant / bistro / café
14. Takeaway / fast food outlets
15. Other change (SPECIFY Q1301)
16. Don't know / can't say

Q1301 OTHER CHANGE

HOUSING PREFERENCES NEAR STC

"If the Salisbury Town Centre was redeveloped to include a range of housing types, would you consider living in this type of development, within walking distance of shops and public transport?"

UNPROMPTED BUT PROBE, MR

1. No, would not consider]Q16
2. No, would not leave current home]Q16
3. No, other response (SPECIFY Q1401)]Q16
4. Yes, if the design was right
5. Yes, if it was affordable
6. Yes, other response (SPECIFY Q1402)
7. Don't know / can't say]Q16

Q1401 NO, OTHER

Q1402 YES, OTHER

If yes Q14 (Codes 4,5 & 6), GO Q15

Else GO Q16

TYPE OF HOUSING.

"What type of housing would you consider?"

MR, READ OUT

1. Apartment / shop-top / studio
2. Townhouse / unit
3. Courtyard / villa
4. Student accommodation
5. Something else (SPECIFY Q1501)

Q1501 OTHER HOUSING TYPE

READ OUT: I just have a few more questions to ask, so that we can understand a little more about you.

GENDER. **Record gender?"**

1. Male
2. Female

YOB

What year were you born? _RECORD NUMBER, D IF REFUSED_" NUM 1900-1992 D

HOUSEHOLD

Which of these best describes your household? (1-8)

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

EMPLOYMENT

What is your current employment status?"

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

SUBURB

"Which suburb do you live in? (List of suburbs in City of Salisbury)

Q1901 OTHER SUBURB SPECIFY

CLOSE

That concludes the survey. On behalf of the City of Salisbury and Harrison Research, thank you for your time."

BLANK

ISO 20252

By pressing enter at this screen, I certify that this is a true, accurate and complete interview, conducted in accordance with the ISO 20252 standards and the AMSRS Code of Professional Behaviour (ICC/ESOMAR). I will not disclose to any other person the content of this questionnaire or any other information relating to this project."

TOTAL=225

Non-users=75