

# **Adelaide City Census of Land Use and Employment 2008**

**November 2009**

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## INTRODUCTION

This report provides the results of the Adelaide City Census of Land Use and Employment 2008 (ACCLUE08) and provides information on land use and City employment. These data are part of the research and monitoring by Adelaide City Council and are used to inform discussion of the Adelaide City Council's Strategic Plan and progress towards key targets such as the workforce size in the City.

The collection of employment and land use data for Adelaide City commenced in 1967 and was conducted every five years until 2002. Since 2002 the census was collected in 2005 and 2006 and the frequency is now set at every two years. The time series associated with this collection provides the potential to examine changes to the types of employment in the City and the locational shifts over time. This report provides the results of the latest collection and comparisons with the 2006 data.

ACCLUE08 data were collected over the period June to October 2008, with some follow-ups completed by December 2008. As a result the results do not include the impacts of the Global Financial Crisis (GFC) and resultant job losses. This report provides data on land use and employment in 2008 and comparisons with previous land use data to highlight changes over the 2006-2008 period as well as some of the major spatial patterns of City usage. The land use census includes data on:

- Employment by status (full-time and part-time)
- Employment by location (building and survey blocks)
- Employment by land use type (Adelaide City classification and ANZSIC)
- Employment by duration in City
- Specific City sub-economies (e.g. the night economy)

These data will be presented in this report to highlight key patterns of City use and how the City has changed from the 2006 land use census collection.

## SUMMARY

### Total Employment

**The 2008 City employment total exceeds the 2010 Adelaide City Council target of a workforce of 111,000 by 8,400.**

The number of jobs in the City rose 9.7% over the 2006 to 2008 period, from approximately 108,000 in 2006 to 118,490 in 2008.

Of this total, 111,760 are full-time or part-time jobs located in Adelaide City.

The remaining employment (6,720) was based in the City, visits the City at least once per week, but works outside the City.

The growth in City employment 2006-2008 is significantly greater than the 2005-2006 increase and is likely a product of the boom economy with increases in residential development, population and student numbers.

Given the GFC occurred post data collection; these results should be viewed with some caution. However, even if some of this employment has been lost since 2008, total employment growth is still significant and in advance of the 2010 work force target.

### Working in the City

The growth in the number of jobs was driven by growth:

- In the office sector (85%).
- Retail (5.7%).
- Utilities (4%).
- Education (3.8%).

Approximately 30 percent of jobs continue to be in government administration at all levels.

### Residential

The established residential zones in North Adelaide and the south-east and south-west of the City square mile are now being augmented by the increase in apartment development in the central activity district north of Grote and Wakefield Streets.

Growth in the residential population may slow as a result of the GFC and the changing requirements for pre-commitment sales by financial institutions, which will impact on City development activity.



## METHODOLOGY

The Adelaide City Census of Land Use and Employment 2008 (ACCLUE08) is a collection of all employment and land use in the Adelaide City Council area. The Adelaide City Council area is sub-divided into survey blocks to manage the collection workload and to provide an analysis framework (see Figure 1). Data are collected at the establishment (business), building and survey block and this is the basis of the spatial framework.

The 2008 data were collected over the period from June till October 2008 by a team of six collectors who visited every business and completed the questions or made an appointment to complete the questionnaire (see Appendix A for the questionnaire form). If, after three attempts the business did not complete the questionnaire the project manager contacted the business to complete the questionnaire or emailed or mailed the questionnaire. Larger employers and government was managed from the office and one team member phoned each government agency. This improved the response rate for State Government and Commonwealth Government, although there were still a few that were imputed from annual reports.

Employment information is collected from all employers in the City and includes data on business activity, employment (full time, part time employment on-site and off-site), the length of time they have been at this address (if recently moved, where they moved from), venue details (number of rooms at a hotel, tables indoor or outdoor at restaurants, car parking for example) and building data such as wheelchair access, butt-out bins, secure bicycle parking, provision of showers and building condition. Non-employing establishments such as residential uses are recorded, but the surveyors do not ask any questions.

The census is not compulsory and businesses are not required to answer the questions. Despite this, most businesses in Adelaide City provide their information, with very few refusals. In the case of a refusal, the employment data are captured from other sources if possible, such as annual reports, or imputed from the previous collection. If the business was new since the previous collection, the data may be imputed from similar businesses located elsewhere in the City and the ratio of floor space to employment. Every attempt is made to ensure the data are sourced from the employer, and imputing is a last resort.

The data are captured on the basis of strict confidentiality and therefore the results will be aggregated to protect employment data for any individual business. The confidential basis of the collection is one of the reasons businesses will cooperate. Any analysis of the ACCLUE08 data will not breach confidentiality.

The growth recorded over the 2006-2008 period reflected the boom economic climate prevailing in Australia and the flow through to South Australia, including higher levels of international migration and increasing over seas student numbers. Since these data were collected the World has been hit with a financial crisis, worse then any experienced before and Adelaide is starting to see some of this flow through. It is important to stress the pre GFC status of the results when using or referencing these data.

## FURTHER ANALYSIS

The information contained in this report is based upon the Adelaide City Census of Land Use 2008 and presents some of the key results. This report does not cover all aspects of the data and more specific customised outputs are available upon request.



## DATA QUALITY

Before progressing to the results, it is worth considering the data quality and the method of collection. ACCLUE is a census of all business and therefore the results reflect total employment by businesses located in Adelaide City. Every attempt is made to ensure the integrity of these data and the employment data provided by employers is accepted as a valid number. While the validation process checks for issues of space against employment numbers, data cannot be altered without significant doubt, consulting the original source and/or cross checking against other data. State Government employment change 2006-2008 raised some concerns based on secondary data and this is outlined below.

The growth recorded from 2006 was due to additional full-time jobs in State Government (4624), Commonwealth Government (1866) and the private sector (3682). However, the level of State Government employment in the 2006 Land Use and Employment Census is lower than reported in the Commissioner for Public Employment Annual Report in 2006. The Commissioner for Public Employment reported 29,244 public sector employees in Adelaide in 2006 whereas, ACCLUE06 reported 24,315<sup>1</sup> in 2006. It is important to stress that the ACCLUE data capture method has remained relatively unchanged over the 2006-2008 period and the resultant employment data are the best possible given the limitations imposed by the methodology.

To mix and match from a range of sources, such as questionnaire (primary data) and annual reports (secondary data), at different times (as at June 30 or June to October) and using different reporting measures (full time equivalents or full-time\part-time) creates a less plausible outcome and should be avoided. While other data sources are used as part of the validation process the data as collected has to form the basis of the ACCLUE collection and should not be changed without considerable checking with the original data source or, in the case of State Government employment, advice from the Commissioner of Public Employment. Fluctuations in employment can occur rapidly, such as the loss of 200 jobs at BHP following the GFC and uncertainty over the Olympic Dam mine extension.

ACCLUE is not an absolute or the only source of employment data but does provide a valid base for identifying employment change in the City. Some people refuse to provide data, others round to the nearest 10 or 100 and others can not provide a full\part-time break down, but despite these issues, ACCLUE uses the same method of capture from one collection to the next and this continuity of capture results in the best possible data and a dataset comparable over time. It should be recognised that there is no other data set that measures employment in the City, other than the Journey to Work data from the ABS Census every five years. For example, ACCLUE in 2006 reported total employment of 108,010 while the Australian Bureau of Statistics Journey to Work (JTW) data reported the Adelaide City work force at 98,000 as at June 30, 2006. This is a significant difference and the question arises as to which is correct? Both are collected differently from a different base, employers in the case of the Adelaide City data and individuals in the case of the ABS. This alone makes

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<sup>1</sup> It is not possible to fully reconcile the annual report data with the ACCLUE data for several reasons. The Commissioner for Public Employment reports full time equivalents (not full-time and part-time as recorded in ACCLUE) and the method of collection differs from a mandatory reporting process for the Commissioner to a voluntary response to Adelaide City Council. It would be optimistic to expect the ACCLUE data to be an exact match with the Commissioner's data. The extra effort to capture the 2008 data resulted in a state government employment total of 28,939 while the 2007 Commissioner's Report was 30,808 a difference of about 1800. If the higher 2006 State Government figure is used than employment growth 2006-2008 is approximately 5,000 (5%) and mostly due to private sector increases and the Commonwealth Government; State Government would have declined by about 300.

comparisons difficult; you could argue that an organisation should know how many people are employed, but equally you could argue that an individual knows where they work. The JTW data will only capture one job in the City while ACCLUE will capture people with more than one job in the City, especially in the food and retail sectors. Coding and interpretation differences will also play a part in the differences and each method has strengths and weaknesses. Consequently, the finding of this report and the changes to employment are based upon the ACCLUE data and should be used with an understanding of how these data are collected.

## TOTAL EMPLOYMENT

**The 2008 City employment total exceeds the 2010 Adelaide City Council target of a workforce of 111,000 by 8,400.**

Total employment in Adelaide City increased from approximately 108,000 in 2006 to 118,490 in 2008, an increase of 9.7% (Table 1).

Of the 2008 total employment, 76,109 were full-time on-site, 35,653 part-time on-site, 4,416 full-time off-site and 2,309 part-time off-site. Employment growth was driven by a 4,624<sup>2</sup> change in State Government employment, 3,682 from the private sector and 1,866 from Commonwealth Government. While total employment increased by 9.7%, full-time employment increased by 12.9% and part-time decreased by 1.5% (Table 1). Due to the reporting of full-time equivalents by some State, Commonwealth and some of the major employers, it is likely that the part-time employment is relatively unchanged over the period. Again, the gains in off-site employment are more likely to be differences in classification, especially function centre staff.

City employment (on-site) was 94% of all employment with the remaining 6% visiting the City at least once per week.

The private sector is the largest employer accounting for 70% of total employment, 64% of full-time and 77% of part-time employment. Commonwealth employment increased by 40%, State Government<sup>2</sup> 19% and the private sector by 5%. Local Government employment is relatively unchanged over the period with a slight decrease of 12 persons or 1.5%.

It should be noted that local government employment included all full-time and part-time permanent, contract and casual staff.

The growth in City employment 2006-2008 is significantly greater than the 2005-2006 increase and is likely a product of the boom economy which follows from the increases in population and commercial, student and residential development.

Given the GFC that has occurred post data collection these results should be viewed with some caution. However, even if some of this employment has been lost since 2008, total employment growth is still positive and in advance of the work force target.

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<sup>2</sup> State increase is probably due to an undercount of State Government employment in the 2006 Land Use and Employment Census. In the Commissioner for Public Employment Annual Report in 2006, The Commissioner reported 29,244 public sector employees in the Adelaide CBD whereas, ACCLUE06 reported 24,3152 in 2006. It is important to stress that the ACCLUE data capture method has remained relatively unchanged over the 2006-2008 period and the resultant employment data are the best possible given the limitations imposed by the methodology. Consequently, State Government employment has remained relatively unchanged over the 2006-08 period.

**Table 1: Adelaide City Employment 2006 and 2008.**

| 2006 Employment            |                   |                   |                    |                    |                               |                  |
|----------------------------|-------------------|-------------------|--------------------|--------------------|-------------------------------|------------------|
| Sector                     | Full Time On-Site | Part Time On-Site | Full Time Off-Site | Part Time Off-Site | Full Time & Part Time On-Site | Total Employment |
| Local*                     | 457               | 154               | 201                | 0                  | 609                           | 812              |
| State                      | 16652             | 7579              | 9                  | 4                  | 24230                         | 24244            |
| Commonwealth               | 4075              | 579               | 2                  | 20                 | 4654                          | 4676             |
| Private                    | 46174             | 27781             | 2753               | 1570               | 73955                         | 78278            |
| Total                      | 67358             | 36093             | 2965               | 1594               | 103448                        | 108010           |
| 2006 Percent of Employment |                   |                   |                    |                    |                               |                  |
| Local                      | 0.68              | 0.43              | 6.78               | 0.00               | 0.59                          | 0.75             |
| State                      | 24.72             | 21.00             | 0.30               | 0.25               | 23.42                         | 22.45            |
| Commonwealth               | 6.05              | 1.60              | 0.07               | 1.25               | 4.50                          | 4.33             |
| Private                    | 68.55             | 76.97             | 92.85              | 98.49              | 71.49                         | 72.47            |
| Total                      | 100.00            | 100.00            | 100.00             | 100.00             | 100.00                        | 100.00           |
| 2008 Employment            |                   |                   |                    |                    |                               |                  |
| Local                      | 453               | 144               | 199                | 4                  | 597                           | 800              |
| State                      | 21241             | 7170              | 404                | 124                | 28411                         | 28939            |
| Commonwealth               | 5630              | 886               | 16                 | 24                 | 6516                          | 6556             |
| Private                    | 48785             | 27453             | 3797               | 2157               | 76238                         | 82192            |
| Total                      | 76109             | 35653             | 4416               | 2309               | 111762                        | 118487           |
| 2008 Percent of Employment |                   |                   |                    |                    |                               |                  |
| Local                      | 0.6               | 0.4               | 4.5                | 0.2                | 0.5                           | 0.7              |
| State                      | 27.9              | 20.1              | 9.1                | 5.4                | 25.4                          | 24.4             |
| Commonwealth               | 7.4               | 2.5               | 0.4                | 1.0                | 5.8                           | 5.5              |
| Private                    | 64.1              | 77.0              | 86.0               | 93.4               | 68.2                          | 69.4             |
| Total                      | 100.0             | 100.0             | 100.0              | 100.0              | 100.0                         | 100.0            |
| Difference 2006-08         |                   |                   |                    |                    |                               |                  |
| Local                      | -4                | -10               | -2                 | 4                  | -12                           | -12              |
| State                      | 4589              | -409              | 395                | 120                | 4181                          | 4695             |
| Commonwealth               | 1555              | 307               | 14                 | 4                  | 1862                          | 1880             |
| Private                    | 2611              | -328              | 1044               | 587                | 2283                          | 3914             |
| Total                      | 8751              | -440              | 1451               | 715                | 8314                          | 10477            |
| Percent Change 2006-08     |                   |                   |                    |                    |                               |                  |
| Local                      | -0.9              | -6.5              | NA                 | NA                 | -2.0                          | -1.5             |
| State                      | 27.6              | -5.4              | NA                 | NA                 | 17.3                          | 19.4             |
| Commonwealth               | 38.2              | 53.0              | NA                 | 20.0               | 40.0                          | 40.2             |
| Private                    | 5.7               | -1.2              | 37.9               | 37.4               | 3.1                           | 5.0              |
| Total                      | 13.0              | -1.2              | 48.9               | 44.9               | 8.0                           | 9.7              |

\* Total head count

NA – small values or zero base values

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

## LOCATION OF EMPLOYMENT

The majority of the employment continues to be within the central north of the City square mile and the 'Institutional Zone' between North Terrace and the Torrens Lake (Figure 2). The influence of the University of South Australia on the City West and development of student housing and the resultant employment impacts are evident from Figure 2. The redevelopment of the Balfour site on Morphett Street will continue the expansion of this employment into the City-West. The redevelopment of some major sites along King William Street to the South of the City could further consolidate the central –south focus of employment, in particular office employment.

The area south-west of Light Square had a relatively low density of employment compared to other areas of the central activity district.

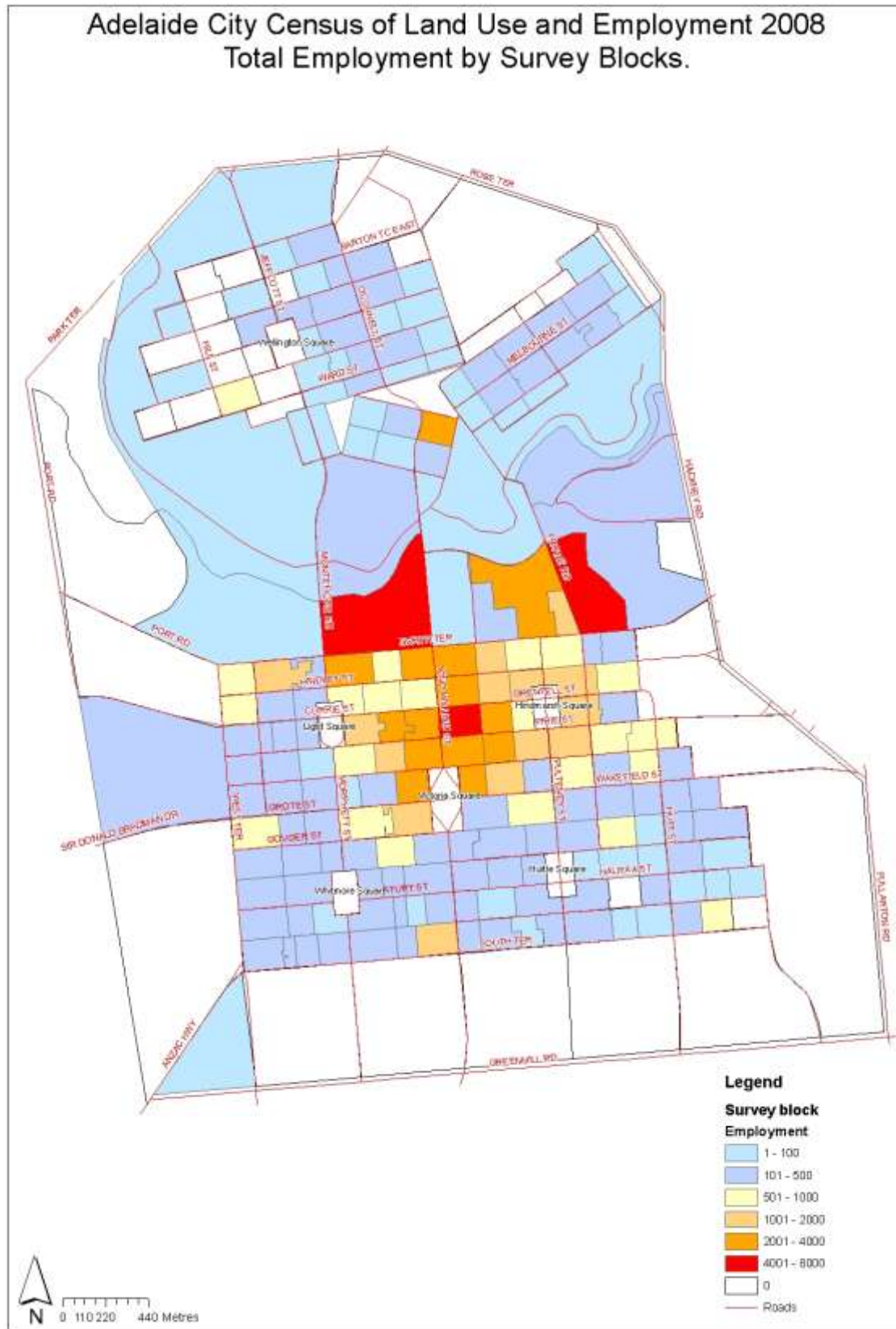
Other areas in the City that become apparent in this map was the concentration of employees at various points including the major public hospitals, the Central Market area (including the eastern end of Gouger Street) and some university campuses.

Linear arrangements of employment of note were the 'main street' areas of Hutt Street in the south-east of the City square mile, and Melbourne Street and O'Connell Street in North Adelaide.

As would be expected, the residential zones in North Adelaide and the south-east and south-west of the City square mile resulted in lower employment totals.



Figure 2: Employment by Survey Block, 2008.





## BUSINESS SIZE

The number of businesses has decreased by approximately 100 over the 2006-08 period, but employment increased in all business size categories except micro business. By business size, the majority of employment continues to be in the large employers with 39% of employment but only 2% of businesses (Table 2). Conversely, micro and small businesses continue to dominate establishment numbers with 4,824 or 85% of the establishments but represented only 24% of employment.

**Table 2: Adelaide City Employment by Business Size, 2006.**

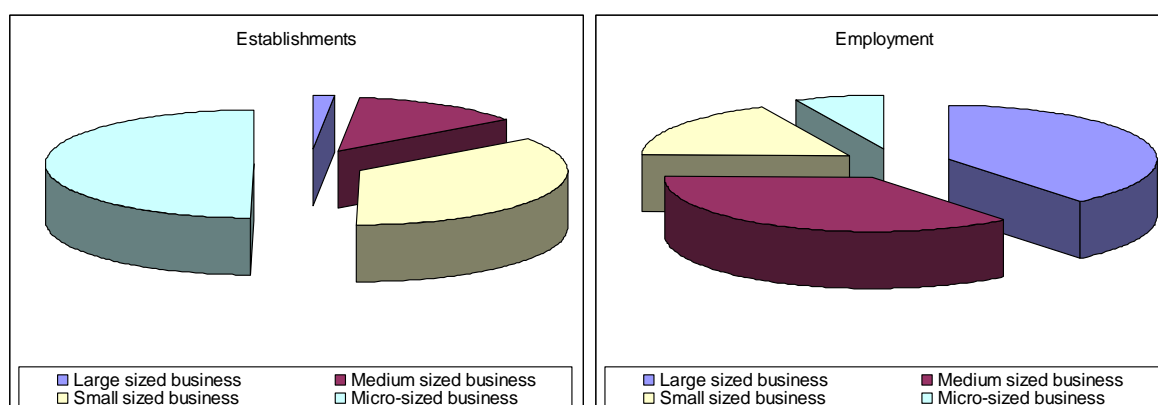
| Size                        | Establishments | Percent | Employment | Percent |
|-----------------------------|----------------|---------|------------|---------|
| <b>2006</b>                 |                |         |            |         |
| Large (> 200 employees)*    | 90             | 1.56    | 39585      | 36.83   |
| Medium (20 - 199 employees) | 711            | 12.29   | 40022      | 36.98   |
| Small (6 - 19 employees)    | 1931           | 33.39   | 19827      | 18.32   |
| Micro (< 5 employees)       | 3052           | 52.77   | 8518       | 7.87    |
| Total                       | 5784           | 100.00  | 108225     | 100.00  |
| <b>2008</b>                 |                |         |            |         |
| Large (> 200 employees)*    | 100            | 1.76    | 46557      | 39.28   |
| Medium (20 - 199 employees) | 757            | 13.33   | 42950      | 36.24   |
| Small (6 - 19 employees)    | 2000           | 35.21   | 20722      | 17.48   |
| Micro (< 5 employees)       | 2824           | 49.71   | 8288       | 6.99    |
| Total                       | 5681           | 100.00  | 118517     | 100.00  |

\* This category is based on employment by Establishment, not Enterprise and therefore large enterprises with multiple locations will be included in this count.

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

The differences are highlighted in Figure 3 which shows the private sector percentage of employing establishments and the percentage of employment by business size in 2006 and 2008.

**Figure 3: Business Size, Adelaide City Employment 2008.**



Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

**Table 3: Adelaide City Private Sector Employment by Business Size, 2006 & 2008.**

|                       |                |            |                 |             |
|-----------------------|----------------|------------|-----------------|-------------|
| 2006 - Private Sector |                |            |                 |             |
| Business Size         | Establishments | Employment | Establishments% | Employment% |
| Large sized business* | 52             | 21061      | 0.95            | 26.83       |
| Medium sized business | 586            | 30407      | 10.67           | 38.73       |
| Small sized business  | 1834           | 18652      | 33.39           | 23.76       |
| Micro-sized business  | 3020           | 8390       | 54.99           | 10.69       |
| Total                 | 5492           | 78510      | 100.00          | 100.00      |
| 2008 - Private Sector |                |            |                 |             |
| Business Size         | Establishments | Employment | Establishments% | Employment% |
| Large sized business  | 55             | 21269      | 1.02            | 25.83       |
| Medium sized business | 619            | 33219      | 11.49           | 40.34       |
| Small sized business  | 1916           | 19670      | 35.57           | 23.89       |
| Micro-sized business  | 2797           | 8192       | 51.92           | 9.95        |
| Total                 | 5387           | 82350      | 100.00          | 100.00      |

\* This category is based on employment by Establishment, not Enterprise and therefore large enterprises with multiple locations will be included in this count.

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

#### Private sector highlights:

- The private sector was approximately 88 percent small or micro businesses.
- 30 percent of private sector employment was in micro or small business.
- As was the case with total business size, large businesses were one percent of establishments but 26 percent of employment.

#### By location:

- The major employment concentration in the CBD and Institution zones were also the areas with the most employment in the larger employing business (Figure 4).
- Smaller businesses were more widely located across the City, but were more concentrated in the retailing areas in the Central City, Central Market and North Adelaide (Figure 5).

Figure 4: Large Employers by Survey Block 2008.

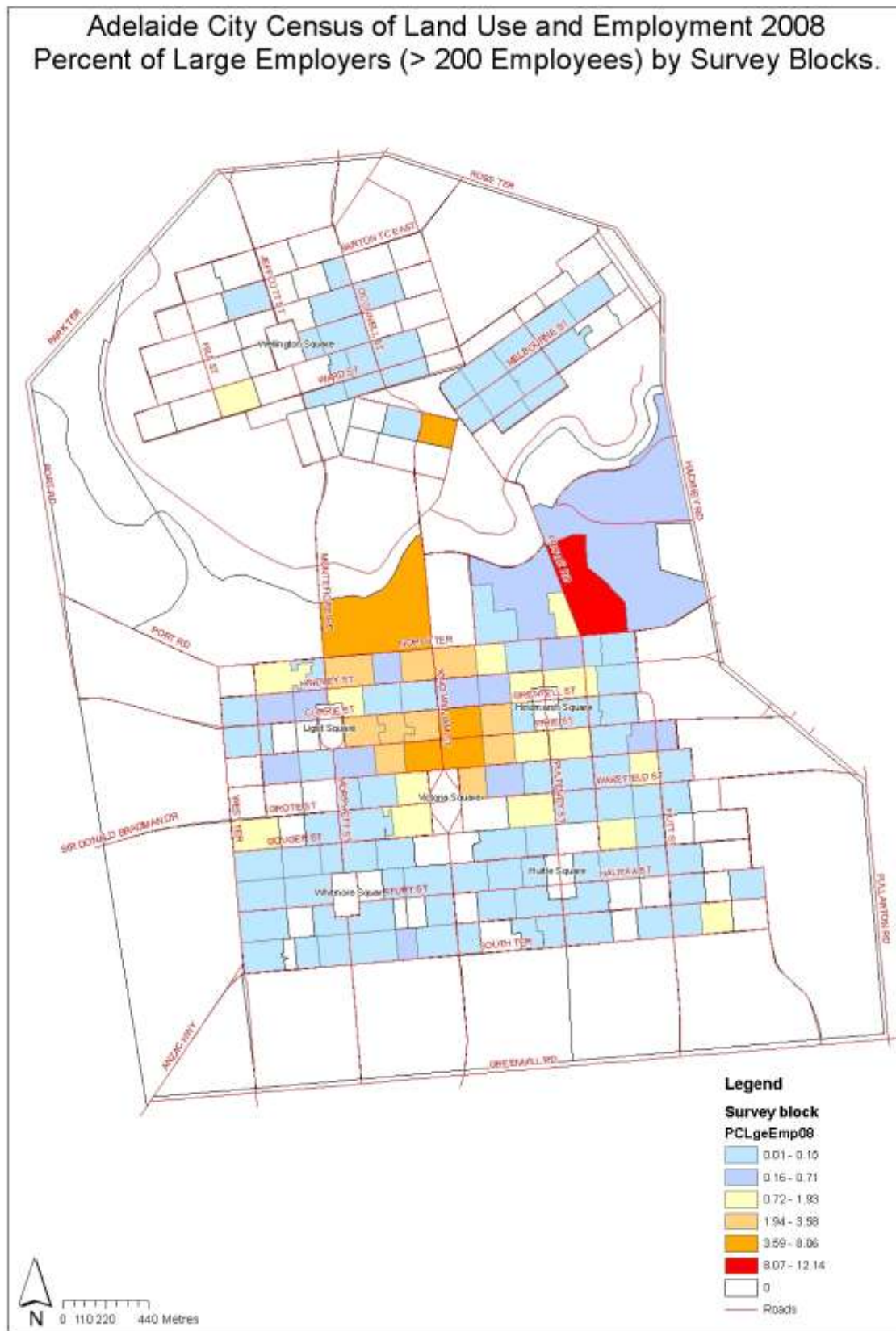
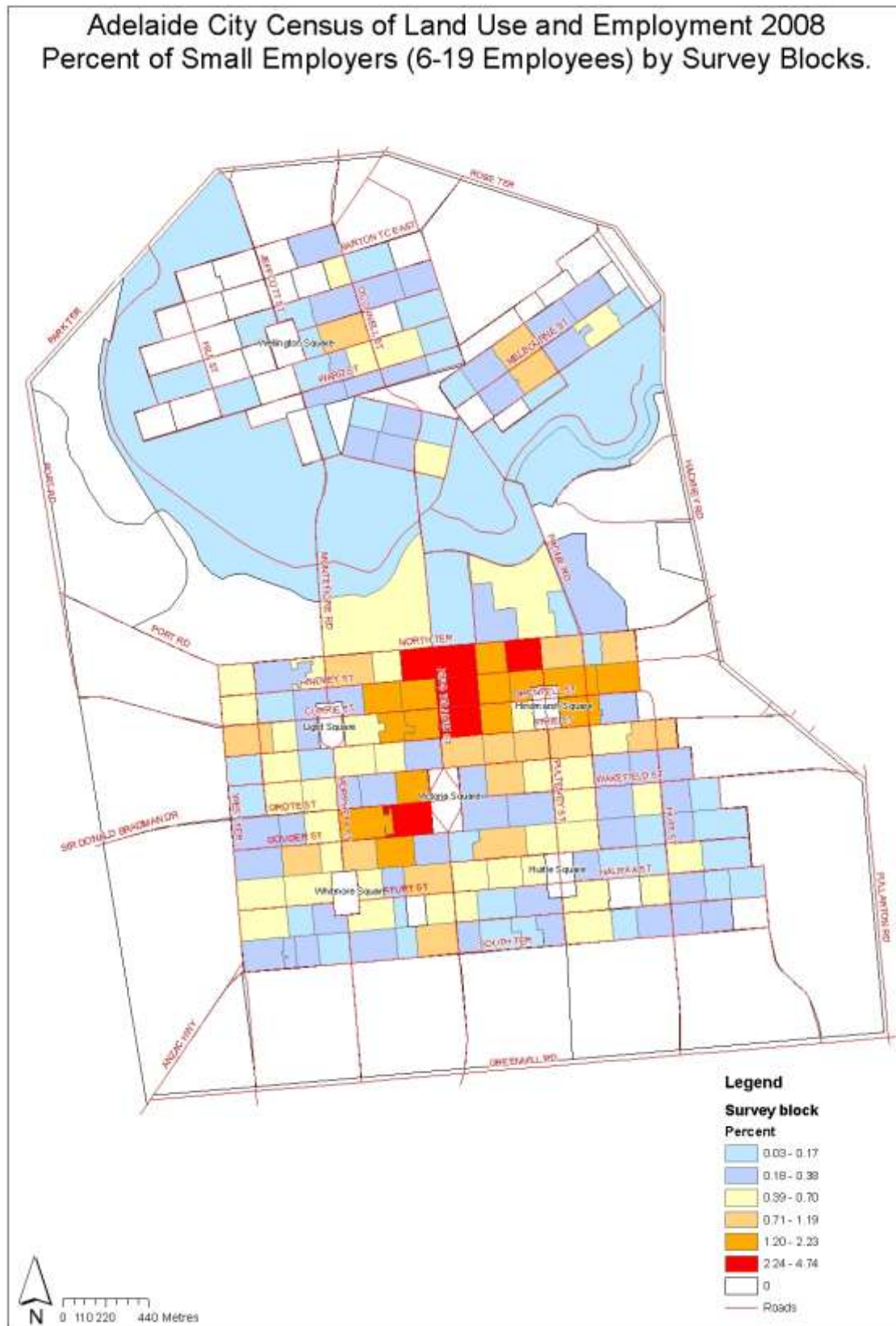


Figure 5: Small Employers by Survey Block 2008.



## DURATION IN THE CITY

The Adelaide City Census of Land Use and Employment in 2008 included a new question on the duration a business had been at their present address (Table 4 and Figure 6). This was coupled with a previous location postcode for businesses that indicated that they had been in Adelaide for less than 2 years.

**Table 4: Establishment by Duration at Present Address, 2008.**

| Duration            | Establishments | Percent |
|---------------------|----------------|---------|
| Not Stated          | 159            | 2.81    |
| less than 12 months | 611            | 10.80   |
| 1 - 2 years         | 992            | 17.53   |
| 3 - 5 years         | 1224           | 21.63   |
| 6 - 10 years        | 1028           | 18.17   |
| 11 - 15 years       | 546            | 9.65    |
| 16 - 20 years       | 259            | 4.58    |
| more than 20 years  | 840            | 14.84   |
| Total               | 5659           | 100.00  |

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

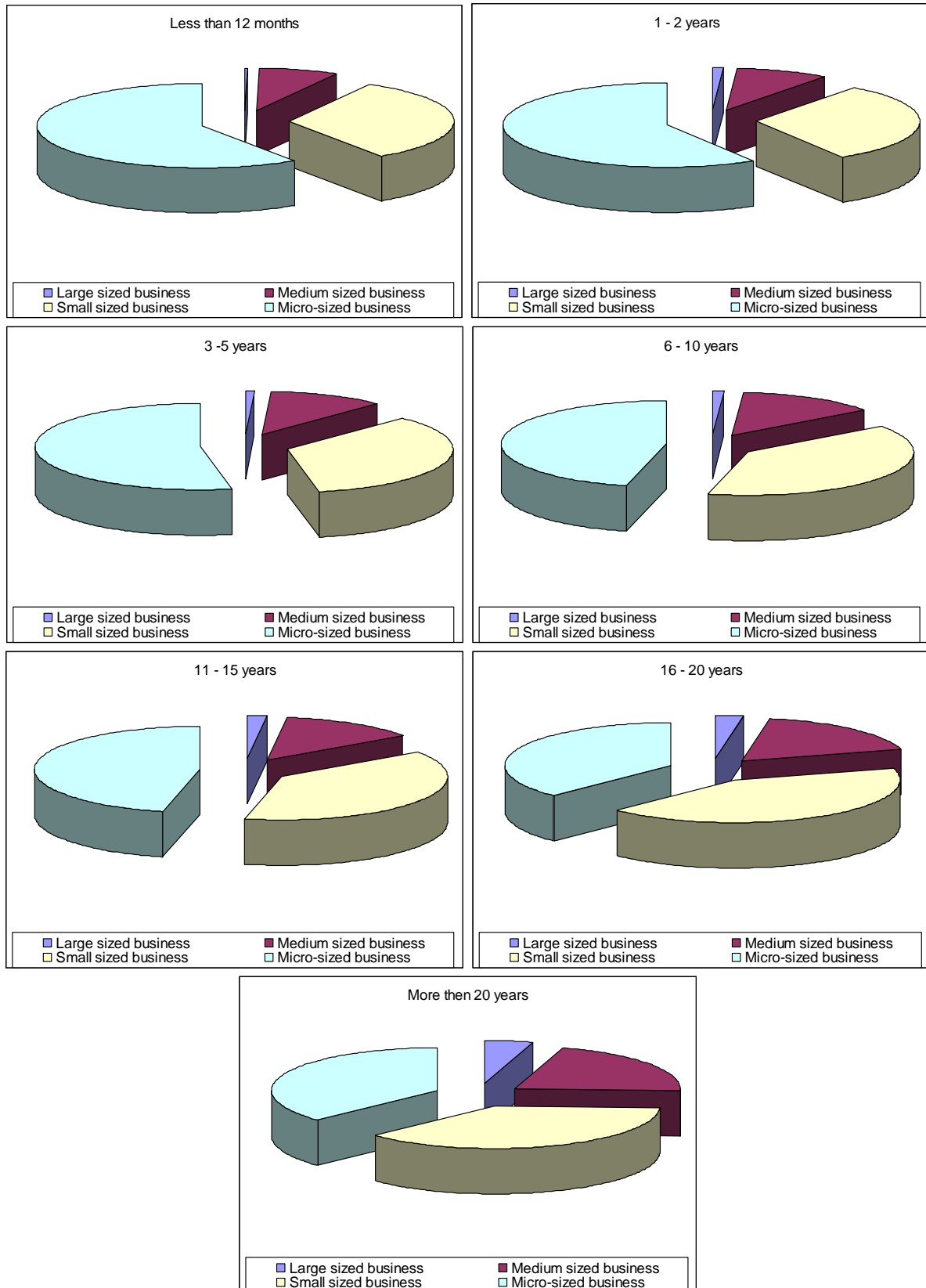
### Highlights:

- Ten percent of business had been in Adelaide for less than 1 year.
- 28% less than 2 years.
- 22% had been in Adelaide for 3-5 years and a similar proportion 6-10 years (18%).
- The number and proportion tapers in the 11-15 (10%) and 16-20 years (5%)
- 15% of establishments had been in the City for 20 years or more, however, this includes Commonwealth, State, Local Government, Universities and other institutions.

### Duration and business size highlights (Figure 6):

- Micro size businesses dominated the less than 12 months and 1-2 years duration (this reflects the higher rate of new business creation and failure).
- Micro and small business were prominent in all categories, but this reflects the large number of these businesses in the Adelaide City economy.
- Larger businesses were increasingly more evident as the duration year's increase and were most prominent in the greater than 20 years category.

**Figure 6: Establishments by Duration by Business Size, 2008.**



Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.



Of the establishments that had been located in the City for less than one year:

- Professional, Scientific and Technical Services (20%), Retail (18.5%) and Accommodation and Food Services (15%) accounted for over half (Table 5 and Table 6). This was also the case for many of the duration classes which highlight the dominance of these activities in the City economy.
- Three to five years and six to ten years accounted for 2200 or 40 percent of business activity in the City.

**Table 5: Number of Establishments by ANZSIC Division by Duration at Present Address, 2008.**

| ANZSIC Division                                  | < 1<br>year | 1 - 2<br>years | 3 - 5<br>years | 6 - 10<br>years | 11 - 15<br>years | 16 - 20<br>years | > 20<br>years | Not<br>Stated |
|--|-------------|----------------|----------------|-----------------|------------------|------------------|---------------|---------------|
| Agriculture, Forestry & Fishing                  | 0           | 5              | 0              | 1               | 0                | 0                | 3             | 0             |
| Mining   | 1           | 7              | 0              | 1               | 0                | 0                | 0             | 0             |
| Manufacturing                                    | 8           | 15             | 19             | 20              | 18               | 6                | 34            | 0             |
| Electricity, Gas, Water & Waste<br>Services      | 1           | 0              | 1              | 2               | 3                | 0                | 1             | 0             |
| Construction                                     | 5           | 15             | 9              | 12              | 3                | 2                | 3             | 1             |
| Wholesale Trade                                  | 18          | 21             | 29             | 30              | 13               | 5                | 21            | 0             |
| Retail Trade                                     | 113         | 145            | 211            | 203             | 111              | 61               | 148           | 3             |
| Accommodation & Food<br>Services                 | 90          | 170            | 187            | 135             | 64               | 30               | 105           | 4             |
| Transport, Postal &<br>Warehousing               | 4           | 3              | 5              | 11              | 2                | 2                | 7             | 0             |
| Information Media &<br>Telecommunications        | 8           | 11             | 21             | 21              | 9                | 6                | 6             | 1             |
| Financial & Insurance Services                   | 41          | 76             | 74             | 63              | 24               | 15               | 42            | 0             |
| Rental, Hiring & Real Estate<br>Services         | 15          | 21             | 26             | 15              | 14               | 5                | 13            | 0             |
| Professional, Scientific &<br>Technical Services | 122         | 223            | 235            | 177             | 100              | 38               | 73            | 3             |
| Administrative & Support<br>Services             | 72          | 80             | 101            | 67              | 26               | 7                | 23            | 2             |
| Public Administration & Safety                   | 16          | 33             | 54             | 31              | 25               | 12               | 26            | 7             |
| Education & Training                             | 19          | 41             | 35             | 33              | 9                | 10               | 60            | 0             |
| Health Care & Social Assistance                  | 29          | 60             | 89             | 104             | 76               | 35               | 114           | 0             |
| Arts & Recreation Services                       | 12          | 8              | 27             | 15              | 5                | 4                | 25            | 1             |
| Other Services                                   | 37          | 58             | 99             | 86              | 44               | 21               | 136           | 2             |
| Total  | 611         | 992            | 1224           | 1027            | 546              | 259              | 839           | 24            |

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

**Table 6: Percent of Establishments by ANZSIC Division by Duration at Present Address, 2008.**

| ANZSIC Division                                  | < 1<br>year | 1 - 2<br>years | 3 - 5<br>years | 6 - 10<br>years | 11 - 15<br>years | 16 - 20<br>years | > 20<br>years | Not<br>Stated |
|--|-------------|----------------|----------------|-----------------|------------------|------------------|---------------|---------------|
| Agriculture, Forestry & Fishing                  | 0.00        | 0.50           | 0.00           | 0.10            | 0.00             | 0.00             | 0.36          | 0.00          |
| Mining   | 0.16        | 0.71           | 0.00           | 0.10            | 0.00             | 0.00             | 0.00          | 0.00          |
| Manufacturing                                    | 1.31        | 1.51           | 1.55           | 1.95            | 3.30             | 2.32             | 4.05          | 0.00          |
| Electricity, Gas, Water & Waste<br>Services      | 0.16        | 0.00           | 0.08           | 0.19            | 0.55             | 0.00             | 0.12          | 0.00          |
| Construction                                     | 0.82        | 1.51           | 0.74           | 1.17            | 0.55             | 0.77             | 0.36          | 4.17          |
| Wholesale Trade                                  | 2.95        | 2.12           | 2.37           | 2.92            | 2.38             | 1.93             | 2.50          | 0.00          |
| Retail Trade                                     | 18.49       | 14.62          | 17.24          | 19.77           | 20.33            | 23.55            | 17.64         | 12.50         |
| Accommodation & Food<br>Services                 | 14.73       | 17.14          | 15.28          | 13.15           | 11.72            | 11.58            | 12.51         | 16.67         |
| Transport, Postal &<br>Warehousing               | 0.65        | 0.30           | 0.41           | 1.07            | 0.37             | 0.77             | 0.83          | 0.00          |
| Information Media &<br>Telecommunications        | 1.31        | 1.11           | 1.72           | 2.04            | 1.65             | 2.32             | 0.72          | 4.17          |
| Financial & Insurance Services                   | 6.71        | 7.66           | 6.05           | 6.13            | 4.40             | 5.79             | 5.01          | 0.00          |
| Rental, Hiring & Real Estate<br>Services         | 2.45        | 2.12           | 2.12           | 1.46            | 2.56             | 1.93             | 1.55          | 0.00          |
| Professional, Scientific &<br>Technical Services | 19.97       | 22.48          | 19.20          | 17.23           | 18.32            | 14.67            | 8.70          | 12.50         |
| Administrative & Support<br>Services             | 11.78       | 8.06           | 8.25           | 6.52            | 4.76             | 2.70             | 2.74          | 8.33          |
| Public Administration & Safety                   | 2.62        | 3.33           | 4.41           | 3.02            | 4.58             | 4.63             | 3.10          | 29.17         |
| Education & Training                             | 3.11        | 4.13           | 2.86           | 3.21            | 1.65             | 3.86             | 7.15          | 0.00          |
| Health Care & Social Assistance                  | 4.75        | 6.05           | 7.27           | 10.13           | 13.92            | 13.51            | 13.59         | 0.00          |
| Arts & Recreation Services                       | 1.96        | 0.81           | 2.21           | 1.46            | 0.92             | 1.54             | 2.98          | 4.17          |
| Other Services                                   | 6.06        | 5.85           | 8.09           | 8.37            | 8.06             | 8.11             | 16.21         | 8.33          |
| Total  | 100.00      | 100.00         | 100.00         | 100.00          | 100.00           | 100.00           | 100.00        | 100.00        |

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

#### Location:

- Within the City and North Adelaide (see Figure 7a and 7b), the Institution blocks had greater proportions with establishments with longer durations in the City, as would be expected given the nature of activities in these blocks (University, Museum, Art Gallery and Hospital).
- King William Street (North Terrace to Victoria Square) had the greater prevalence of businesses with shorter duration.



Figure 7a: Duration of Location in North Adelaide by Survey Block, 2008.

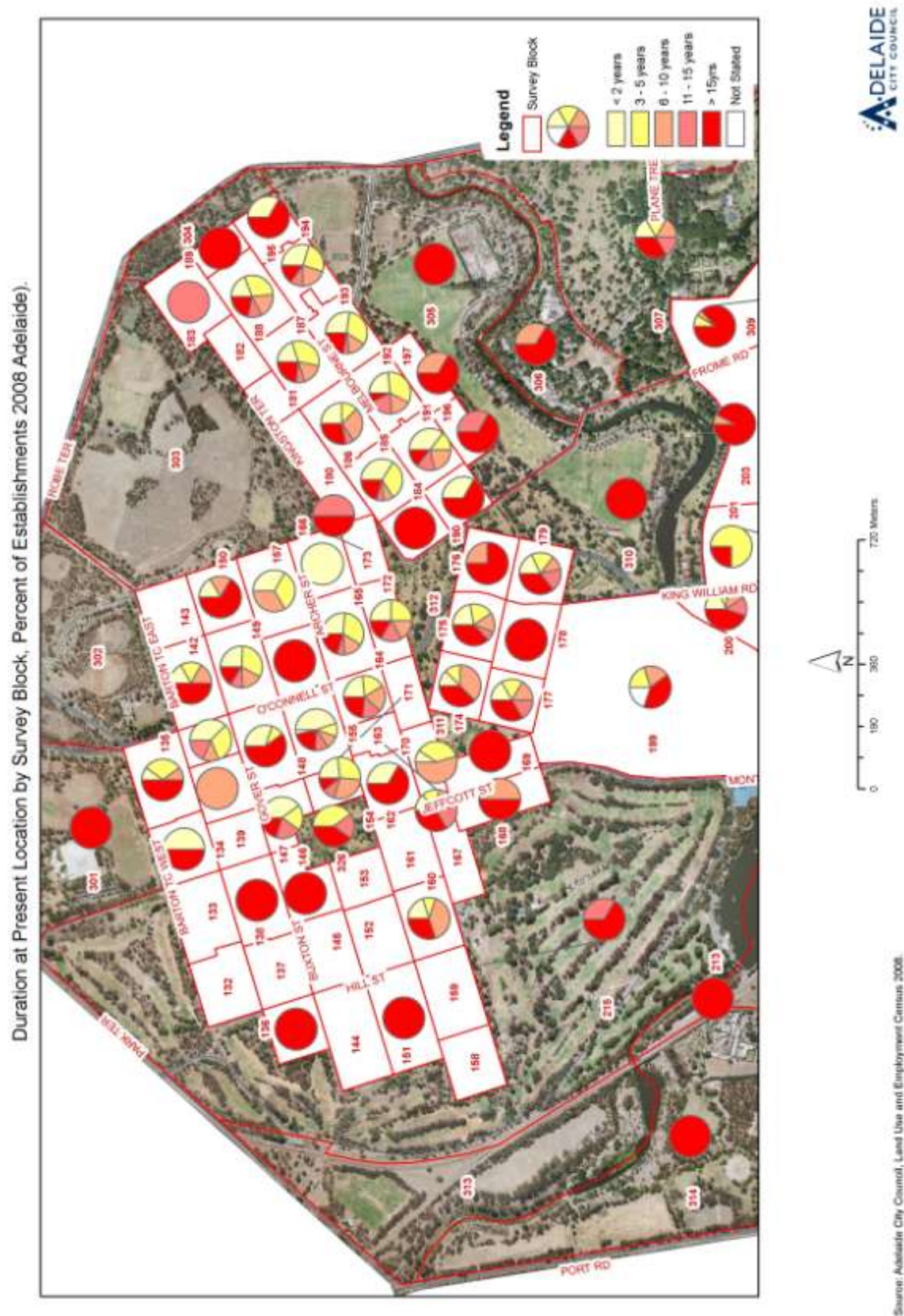
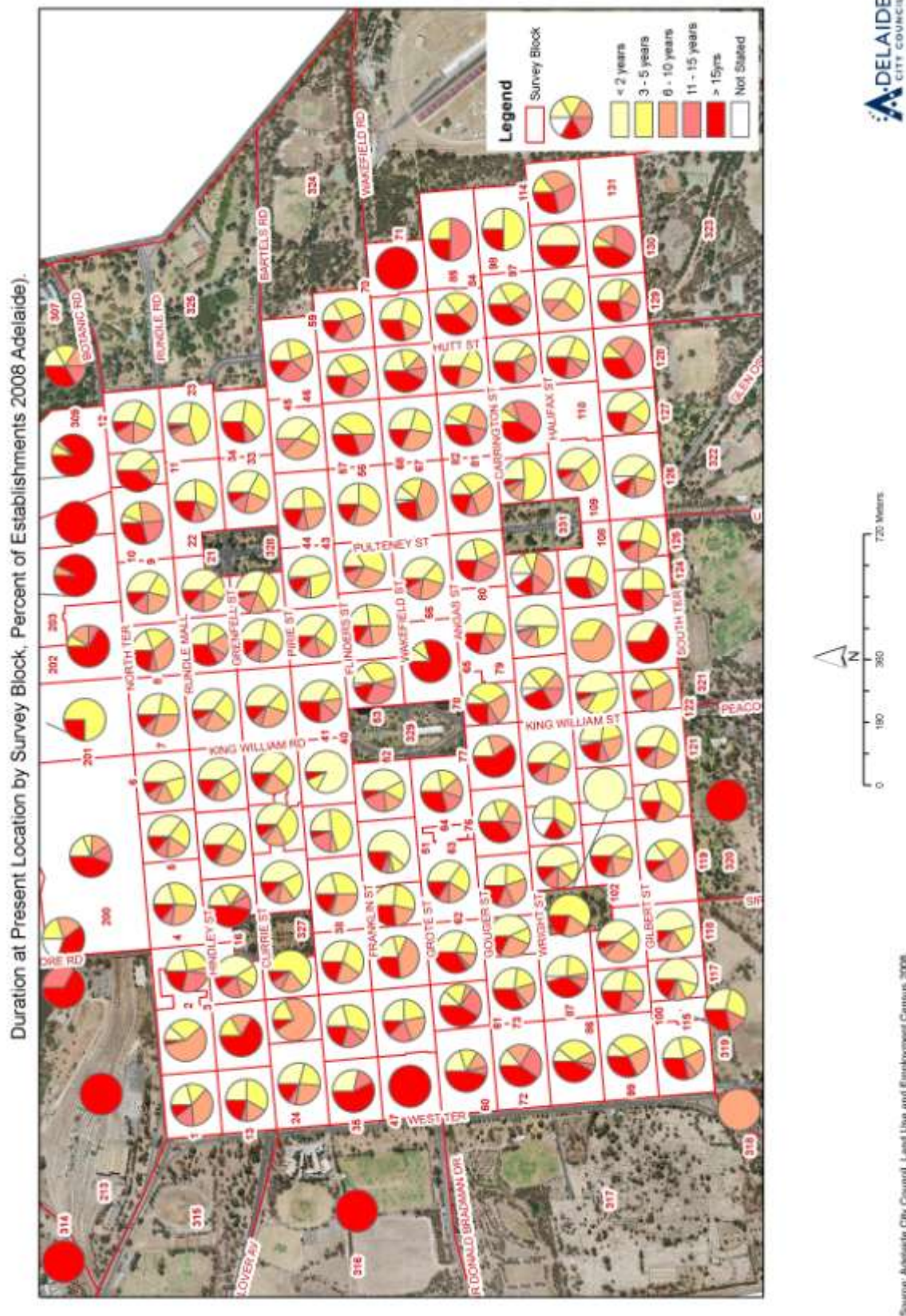




Figure 7b: Duration of Location in Adelaide by Survey Block, 2008.



Of those establishments that reported a duration of less than 2 years (1608, see Figure 8):

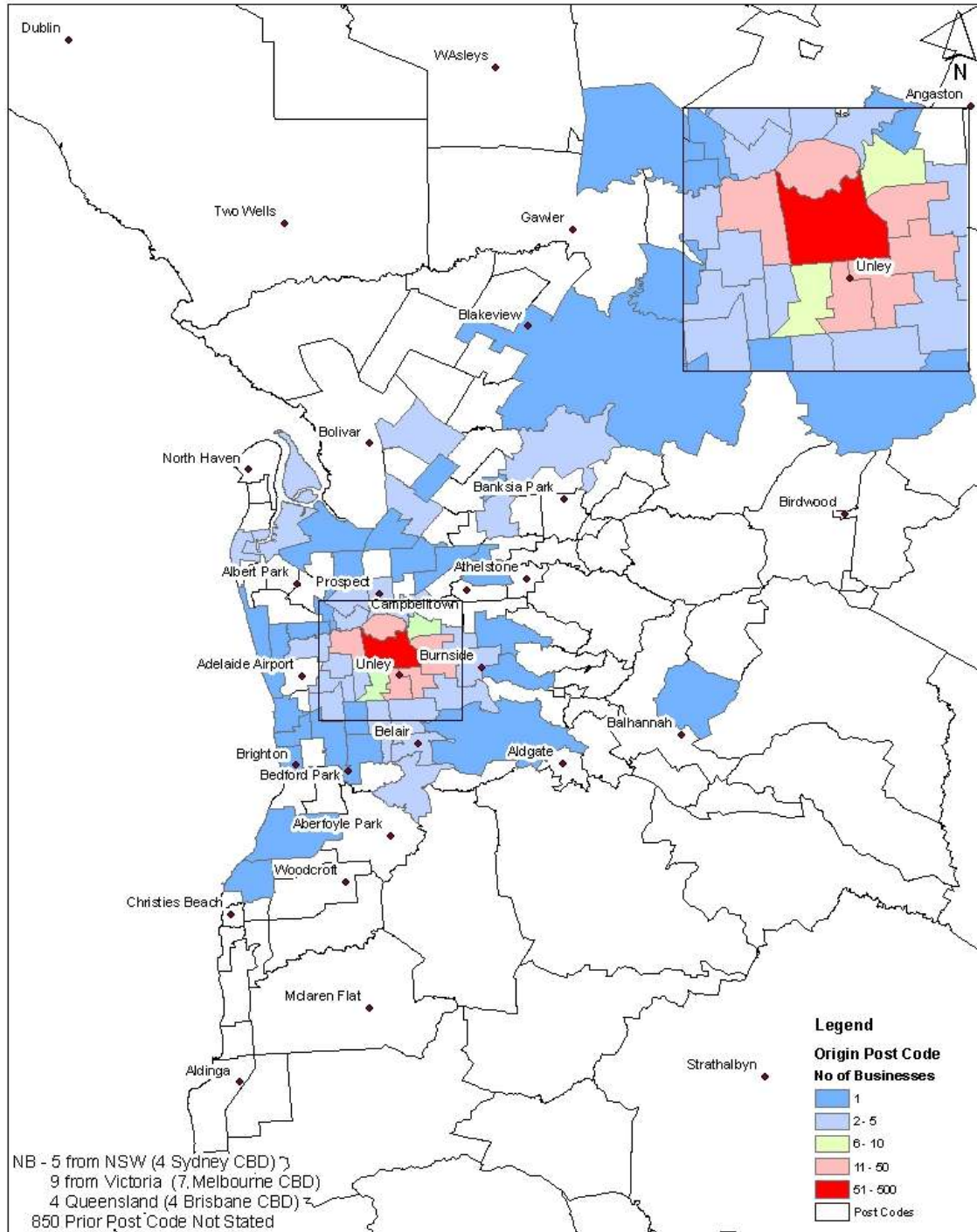
- More than half did not state their previous location (850).
- Of those that stated their prior location, the majority had moved from elsewhere in the City (492) or North Adelaide (43).
- The areas bordering Adelaide City, in particular, Burnside (48), Unley (38), Thebarton (11) and Norwood (9) were the next most important source regions for movers to Adelaide City.
- A small number of movers relocated to Adelaide City from elsewhere in the metropolitan area and a few from the Adelaide Hills and Barossa.
- A small number indicated a move from interstate (see Figure 8).

Of those establishments that reported a move in the next 12 months (Figure 9):

- Approximately 525 businesses indicated a move in the next 12 months
- The majority are looking to relocate in the City or North Adelaide (320 and 24).
- The next most popular areas for relocation are Burnside (12) and Thebarton (6).
- 122 businesses did not state the preferred relocation choice.
- Very few businesses indicated a move from the City.

**Figure 8: Origin Post Code, 2008.**

Origin Post Code, Establishments Duration Less Than 2 Years, 2008



Source: Adelaide City Council, Land Use and Employment Census 2008.

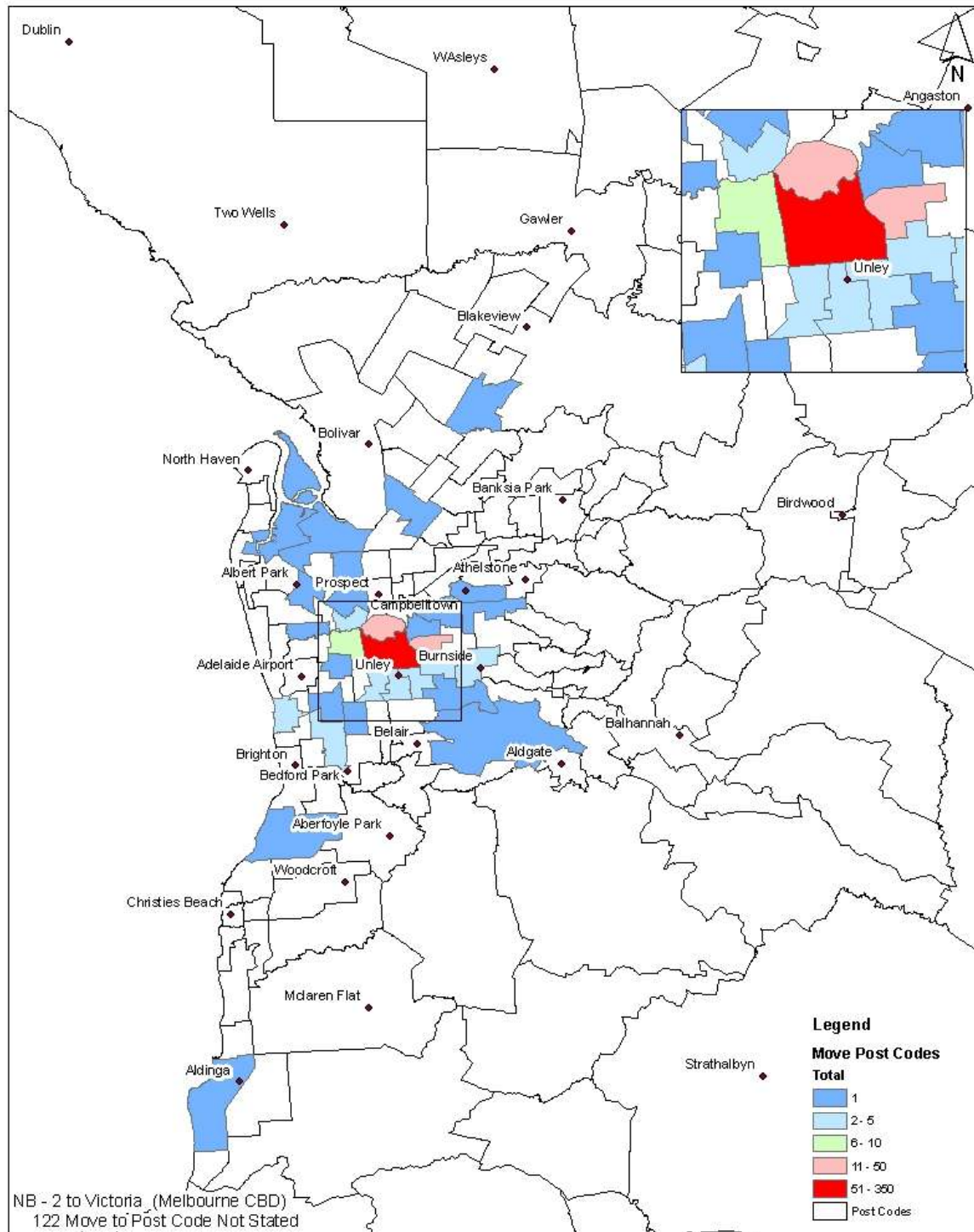
0 3 6 12 18 24  
Kilometres





**Figure 9: Destination Post Code, 2008.**

Destination Post Code, Establishments Indicating a Move in the Next Year, 2008



Source: Adelaide City Council, Land Use and Employment Census 2008.

0 3 6 12 18 24  
Kilometres

## BROAD LAND USE GROUPS

- Office continued to be the dominant land use type with 64,500 or 54% of City employment (Table 7).
- Community and Health Services was 14.5% of employment, Retail Distribution and Servicing 14.4% and Education and Research Places 8%.
- These four land use groups accounted for 91% of City employment in 2008.
- Office employment was predominantly full-time while Retail Distribution and Servicing was dominated by part-time employment.
- The other major employment groups were Community and Health Services which was mostly full-time.
- Education and Research was approximately a 50-50 split of full-time and part –time.

**Table 7: Adelaide City Employment by Broad Land Use, 2008.**

| 2008                            | On-Site   |           | Off-Site  |           |        |
|---------------------------------|-----------|-----------|-----------|-----------|--------|
| Land Use Group                  | Full-Time | Part-Time | Full Time | Part Time | Total  |
| Agriculture & Fisheries         | 1         | 3         | 0         | 1         | 5      |
| Community & Health Services     | 9496      | 7232      | 278       | 187       | 17193  |
| Defence                         | 7         | 2         | 0         | 0         | 9      |
| Education & Research Places     | 4642      | 4200      | 77        | 662       | 9581   |
| Leisure & Recreation            | 1384      | 1801      | 12        | 64        | 3261   |
| Manufacturing                   | 780       | 189       | 119       | 12        | 1100   |
| Offices                         | 49328     | 10635     | 3499      | 1105      | 64567  |
| Residences                      | 1114      | 1527      | 4         | 6         | 2651   |
| Retail Distribution & Servicing | 6950      | 9575      | 254       | 236       | 17015  |
| Storage                         | 101       | 66        | 13        | 2         | 182    |
| Transport Tracks & Places       | 106       | 70        | 4         | 25        | 205    |
| Unused Land & Property          | 0         | 0         | 0         | 0         | 0      |
| Utility Services                | 1561      | 430       | 37        | 1         | 2029   |
| Wholesale Distribution          | 461       | 105       | 119       | 8         | 693    |
| Total                           | 75931     | 35835     | 4416      | 2309      | 118491 |
| Percent 2008                    | On-Site   |           | Off-Site  |           |        |
| Land Use Group                  | Full-Time | Part-Time | Full Time | Part Time | Total  |
| Agriculture & Fisheries         | 0.00      | 0.01      | 0.00      | 0.04      | 0.00   |
| Community & Health Services     | 12.51     | 20.18     | 6.30      | 8.10      | 14.51  |
| Defence                         | 0.01      | 0.01      | 0.00      | 0.00      | 0.01   |
| Education & Research Places     | 6.11      | 11.72     | 1.74      | 28.67     | 8.09   |
| Leisure & Recreation            | 1.82      | 5.03      | 0.27      | 2.77      | 2.75   |
| Manufacturing                   | 1.03      | 0.53      | 2.69      | 0.52      | 0.93   |
| Offices                         | 64.96     | 29.68     | 79.23     | 47.86     | 54.49  |
| Residences                      | 1.47      | 4.26      | 0.09      | 0.26      | 2.24   |
| Retail Distribution & Servicing | 9.15      | 26.72     | 5.75      | 10.22     | 14.36  |
| Storage                         | 0.13      | 0.18      | 0.29      | 0.09      | 0.15   |
| Transport Tracks & Places       | 0.14      | 0.20      | 0.09      | 1.08      | 0.17   |
| Unused Land & Property          | 0.00      | 0.00      | 0.00      | 0.00      | 0.00   |
| Utility Services                | 2.06      | 1.20      | 0.84      | 0.04      | 1.71   |
| Wholesale Distribution          | 0.61      | 0.29      | 2.69      | 0.35      | 0.58   |
| Total                           | 100.00    | 100.00    | 100.00    | 100.00    | 100.00 |

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

## BROAD ACTIVITY GROUPS

- Activity groupings reflects the dominance of office, health and education land use employment (Table 7 and Table 8).
- Public Administration was 25% or 19,063 of full-time workers and 23,023 or 19% of total workers.
- Professional, Scientific and Technical were 14.5% of full-time, 6.5% of part-time and 12.3% of total employment.
- Health Care and Social Assistance and Finance and Insurance Services were about 10% of full-time employment.
- Education 6.3%.
- Part-time employment was noticeably predominantly Health Care (20.4%).
- Accommodation and Food Services (18.2%), Retail Trade (12.2%) and Education (11.5%).

The spatial distribution of employment by broad ANZSIC divisions by survey block is presented in Figures 10 to Figures 28. While many of the broad activity groups were distributed across many block in the City, there were clear areas which represented foci of specific activities:

- Retail was spread across most survey blocks but the Rundle Mall and the Central Markets were prominent (Figure 16).
- Accommodation and food service hot spots were along North Terrace, Rundle and Hindley Streets (Figure 17).
- Finance was most prominent in the CBD (Blocks 29, 30, 43 and 40, 41 see Figure 20).
- Public administration was focussed upon Victoria Square and King William Street (Figure 24).
- Education reflects the locations of the two major universities (the University of Adelaide in blocks 203 and 309 and the University South Australia in blocks 2 and 204) and the Technical and Further Education College at Light Square (blocks 16 and 27).
- Health care was dominated by the major hospital locations (blocks 309, 176, 130, 46, 58 and 160, see Figure 26).
- Arts and recreation was dominated by block 200 which contains the Convention Centre and Arts Theatre (Figure 27).

**Table 8: Adelaide City Employment by Activity Group, 2008.**

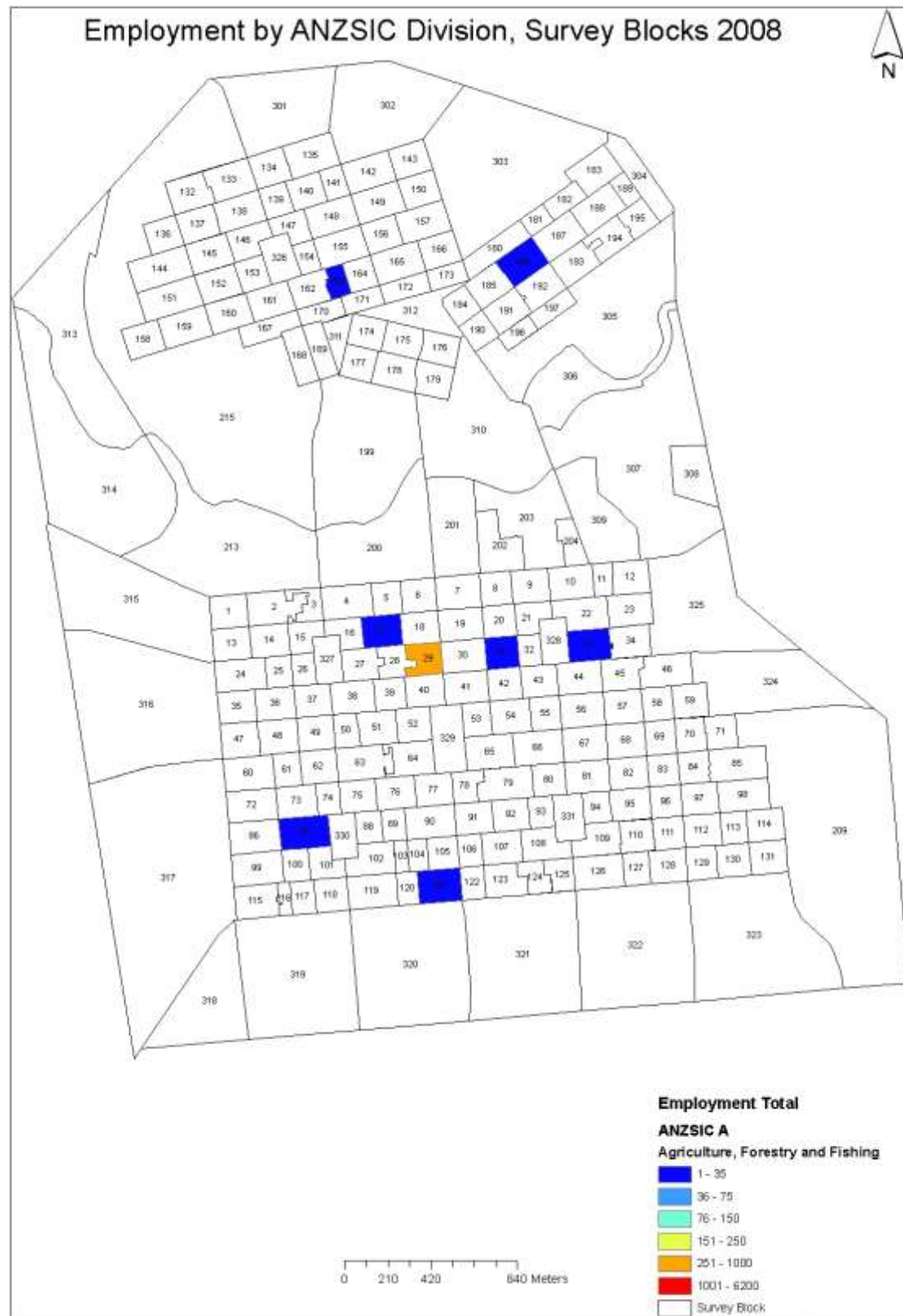
| ANZSIC 1 Digit Classification<br>Number       | On-Site   |           | Off-Site  |           | Total  |
|---|-----------|-----------|-----------|-----------|--------|
|   | Full-Time | Part-Time | Full-Time | Part-Time |        |
| Agriculture, Forestry & Fishing               | 570       | 98        | 4         | 1         | 673    |
| Mining  | 964       | 123       | 5         | 0         | 1092   |
| Manufacturing                                 | 688       | 241       | 111       | 77        | 1117   |
| Electricity, Gas, Water & Waste Services      | 1662      | 208       | 18        | 2         | 1890   |
| Construction                                  | 564       | 94        | 167       | 28        | 853    |
| Wholesale Trade                               | 1054      | 200       | 159       | 30        | 1443   |
| Retail Trade                                  | 3537      | 4359      | 226       | 122       | 8244   |
| Accommodation & Food Services                 | 3121      | 6519      | 11        | 115       | 9766   |
| Transport, Postal & Warehousing               | 844       | 242       | 95        | 237       | 1418   |
| Information Media & Telecommunications        | 3530      | 716       | 215       | 12        | 4473   |
| Financial & Insurance Services                | 7647      | 1544      | 510       | 63        | 9764   |
| Rental, Hiring & Real Estate Services         | 935       | 174       | 144       | 40        | 1293   |
| Professional, Scientific & Technical Services | 10984     | 2325      | 900       | 312       | 14521  |
| Administrative & Support Services             | 3743      | 1117      | 324       | 114       | 5298   |
| Public Administration & Safety                | 19063     | 3178      | 693       | 89        | 23023  |
| Education & Training                          | 4735      | 4134      | 82        | 598       | 9549   |
| Health Care & Social Assistance               | 7889      | 7296      | 300       | 247       | 15732  |
| Arts & Recreation Services                    | 1478      | 1868      | 15        | 115       | 3476   |
| Other Services                                | 2907      | 1360      | 437       | 102       | 4806   |
| Other N.E.C.*                                 | 16        | 34        | 0         | 0         | 50     |
| Total   | 75931     | 35830     | 4416      | 2304      | 118481 |
| Percent 2008                                  |           |           |           |           |        |
| Agriculture, Forestry & Fishing               | 0.75      | 0.27      | 0.09      | 0.04      | 0.57   |
| Mining  | 1.27      | 0.34      | 0.11      | 0.00      | 0.92   |
| Manufacturing                                 | 0.91      | 0.67      | 2.51      | 3.34      | 0.94   |
| Electricity, Gas, Water & Waste Services      | 2.19      | 0.58      | 0.41      | 0.09      | 1.60   |
| Construction                                  | 0.74      | 0.26      | 3.78      | 1.22      | 0.72   |
| Wholesale Trade                               | 1.39      | 0.56      | 3.60      | 1.30      | 1.22   |
| Retail Trade                                  | 4.66      | 12.17     | 5.12      | 5.30      | 6.96   |
| Accommodation & Food Services                 | 4.11      | 18.19     | 0.25      | 4.99      | 8.24   |
| Transport, Postal & Warehousing               | 1.11      | 0.68      | 2.15      | 10.29     | 1.20   |
| Information Media & Telecommunications        | 4.65      | 2.00      | 4.87      | 0.52      | 3.78   |
| Financial & Insurance Services                | 10.07     | 4.31      | 11.55     | 2.73      | 8.24   |
| Rental, Hiring & Real Estate Services         | 1.23      | 0.49      | 3.26      | 1.74      | 1.09   |
| Professional, Scientific & Technical Services | 14.47     | 6.49      | 20.38     | 13.54     | 12.26  |
| Administrative & Support Services             | 4.93      | 3.12      | 7.34      | 4.95      | 4.47   |
| Public Administration & Safety                | 25.11     | 8.87      | 15.69     | 3.86      | 19.43  |
| Education & Training                          | 6.24      | 11.54     | 1.86      | 25.95     | 8.06   |
| Health Care & Social Assistance               | 10.39     | 20.36     | 6.79      | 10.72     | 13.28  |
| Arts & Recreation Services                    | 1.95      | 5.21      | 0.34      | 4.99      | 2.93   |
| Other Services                                | 3.83      | 3.80      | 9.90      | 4.43      | 4.06   |
| Other N.E.C.*                                 | 0.02      | 0.09      | 0.00      | 0.00      | 0.04   |
| Total   | 100.00    | 100.00    | 100.00    | 100.00    | 100.00 |

\* Other Not Elsewhere Classified (includes, construction, parklands and vacant).

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

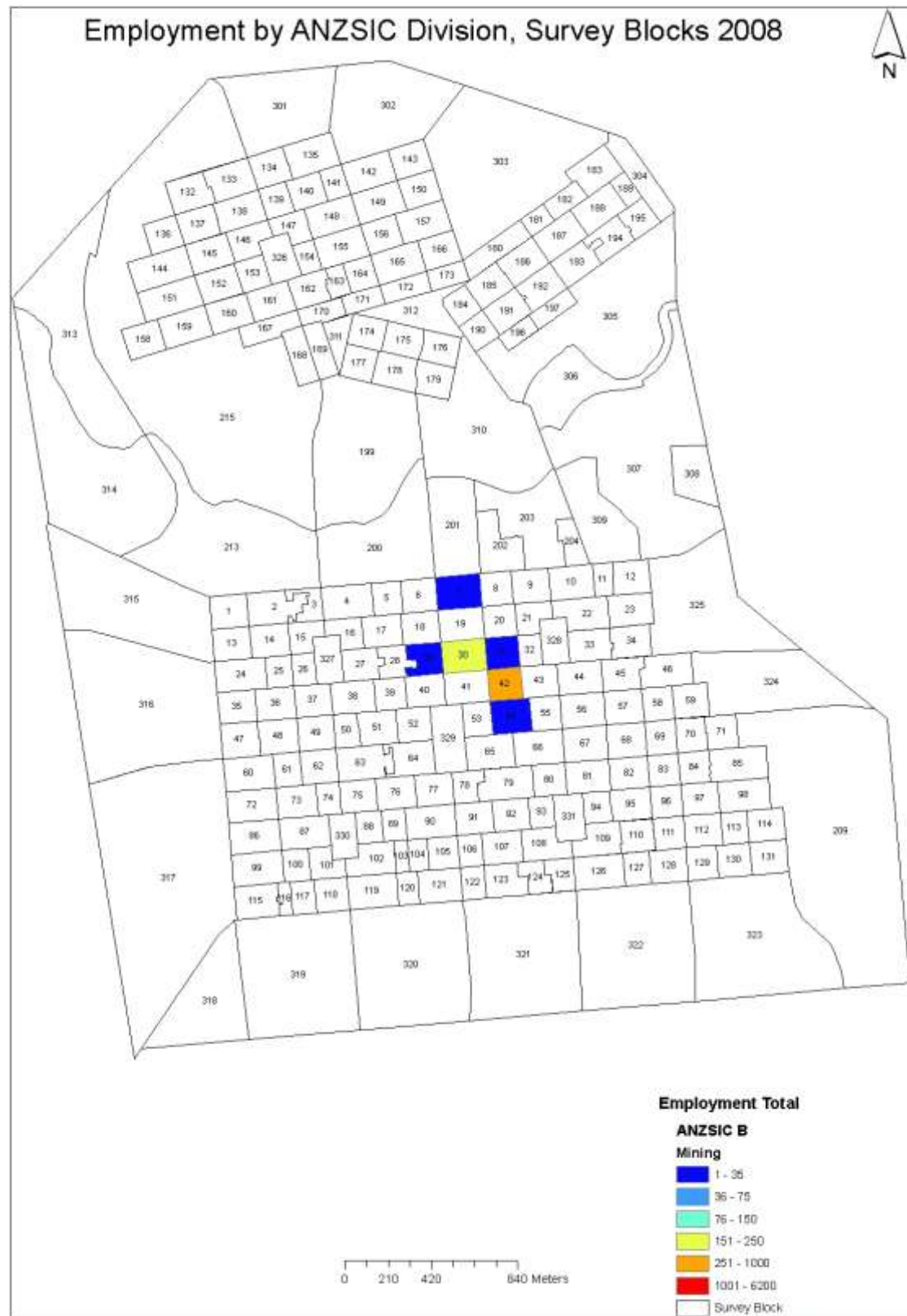


Figure 10: Employment ANZSIC Division A, 2008.



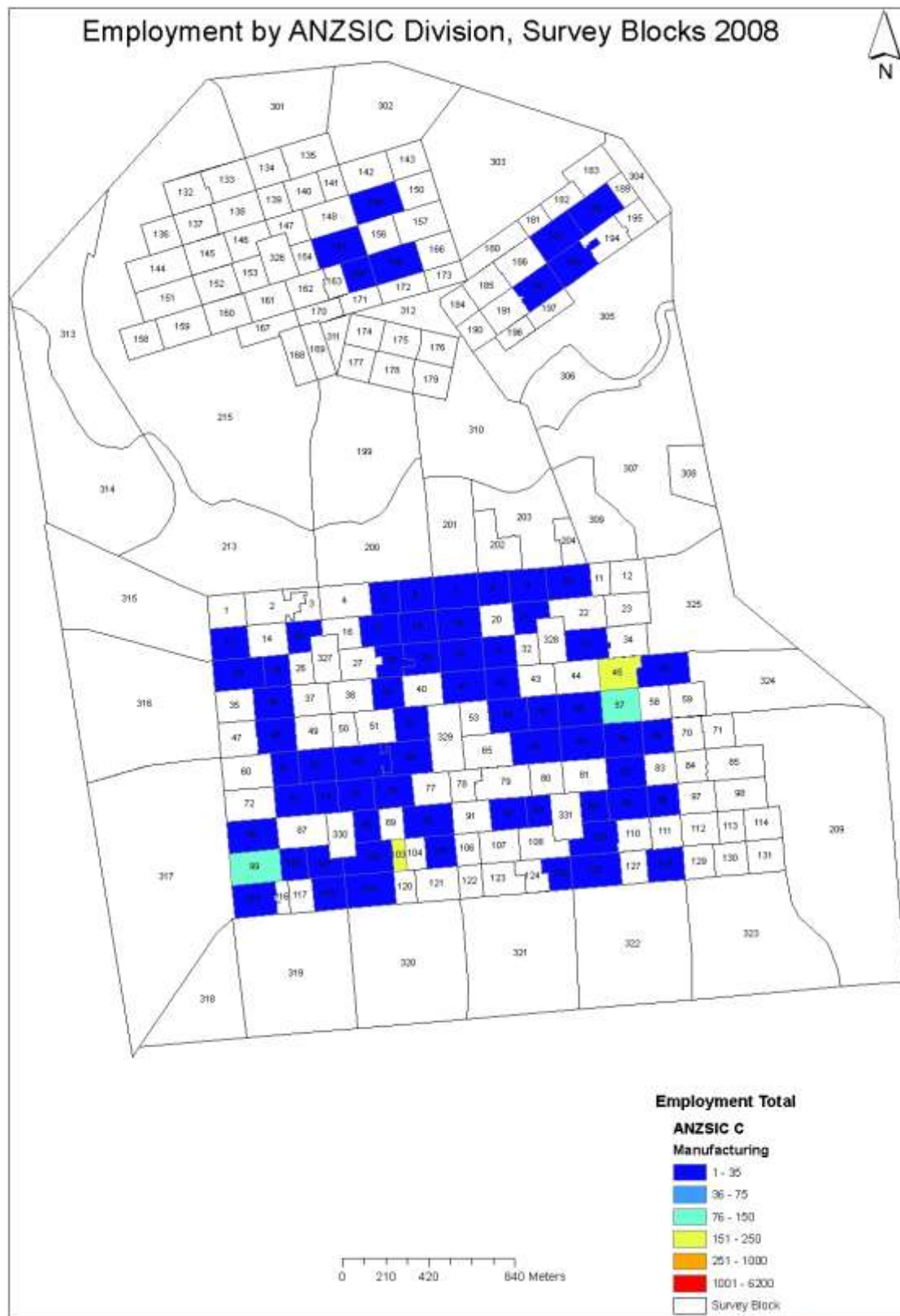
Source: Adelaide City Council, Land Use and Employment Census 2008

Figure 11: Employment ANZSIC Division B, 2008.



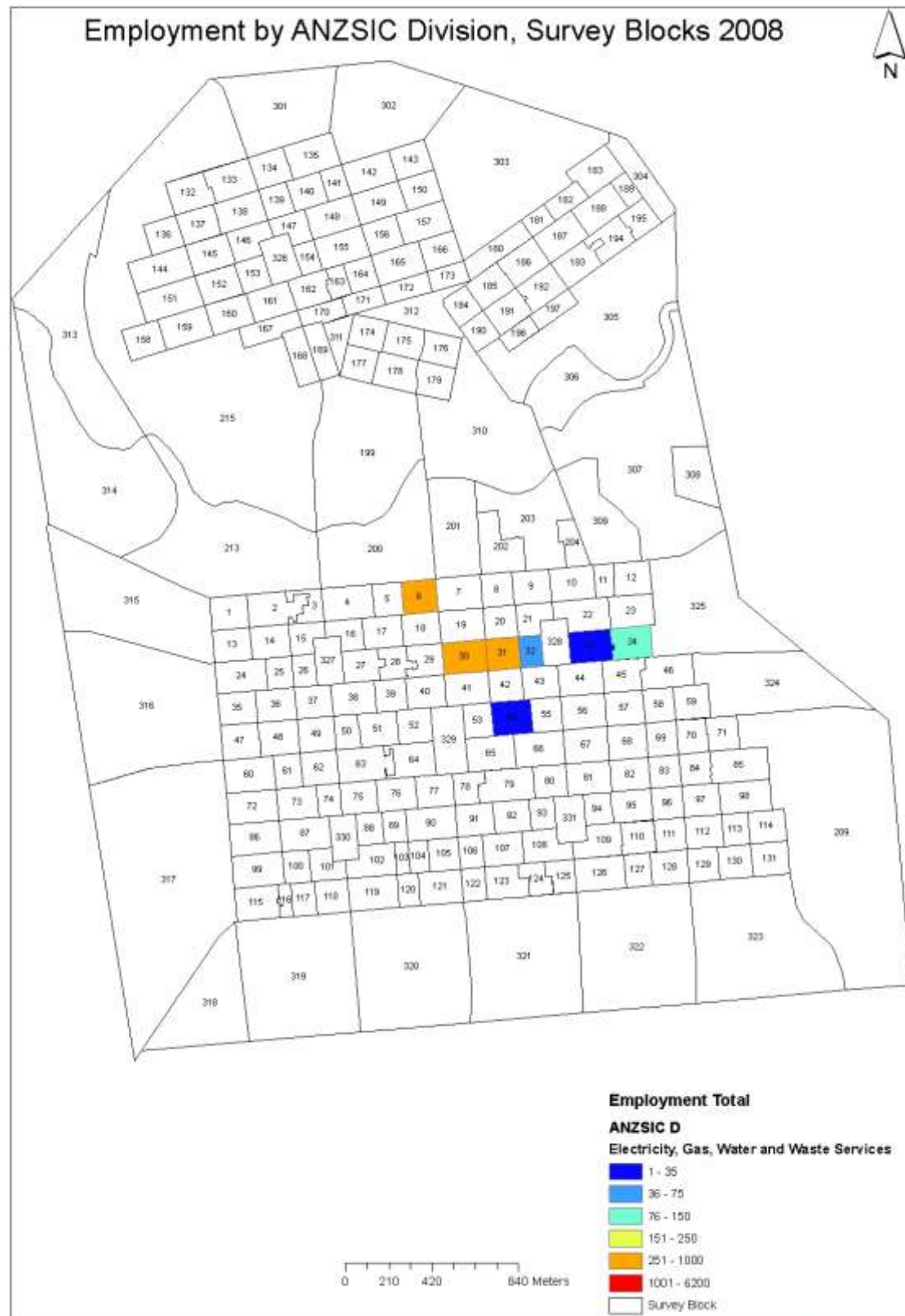
Source: Adelaide City Council, Land Use and Employment Census 2008

Figure 12: Employment ANZSIC Division C, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

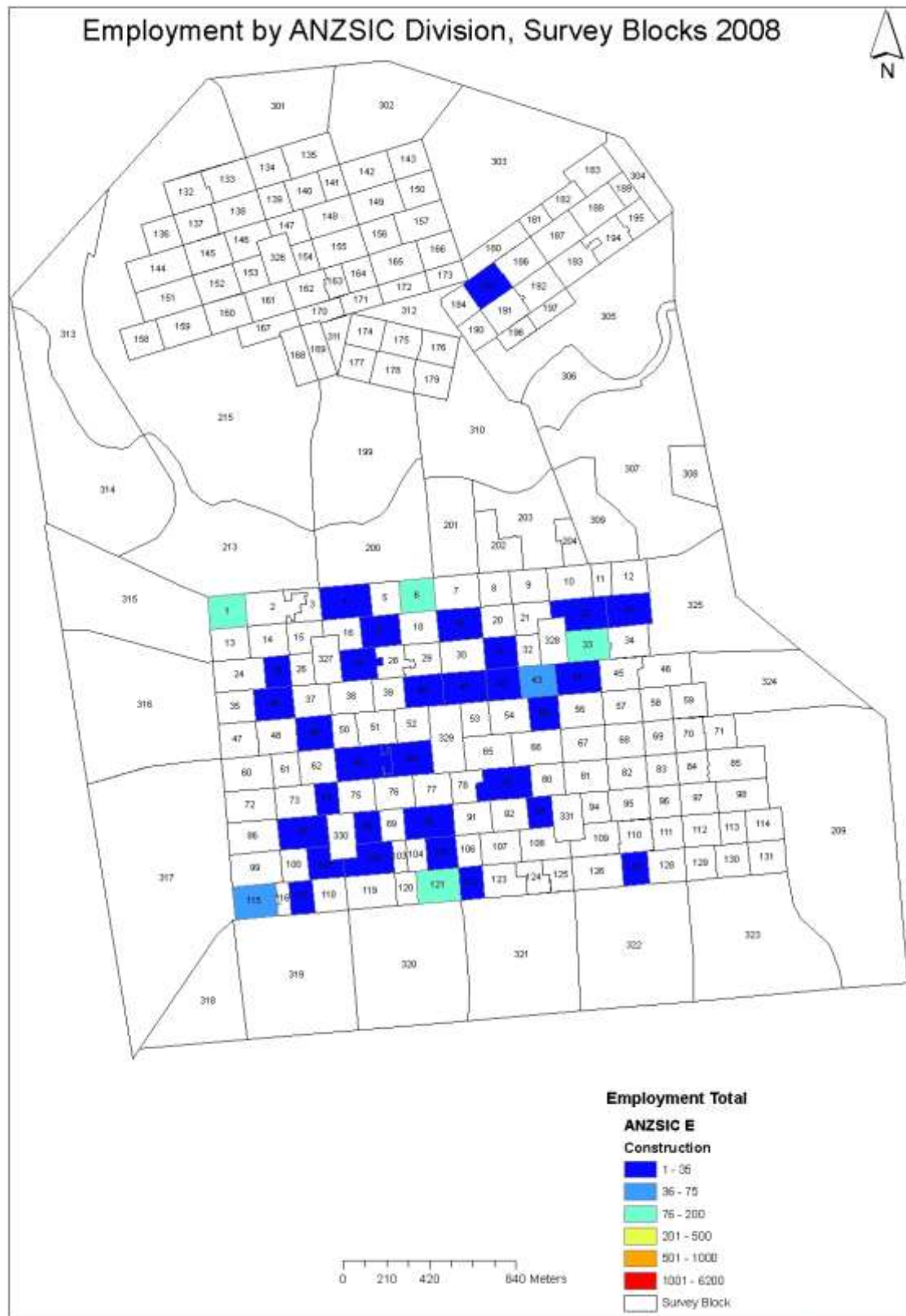
Figure 13: Employment ANZSIC Division D, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008



Figure 14: Employment ANZSIC Division E, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

Figure 15: Employment ANZSIC Division F, 2008.

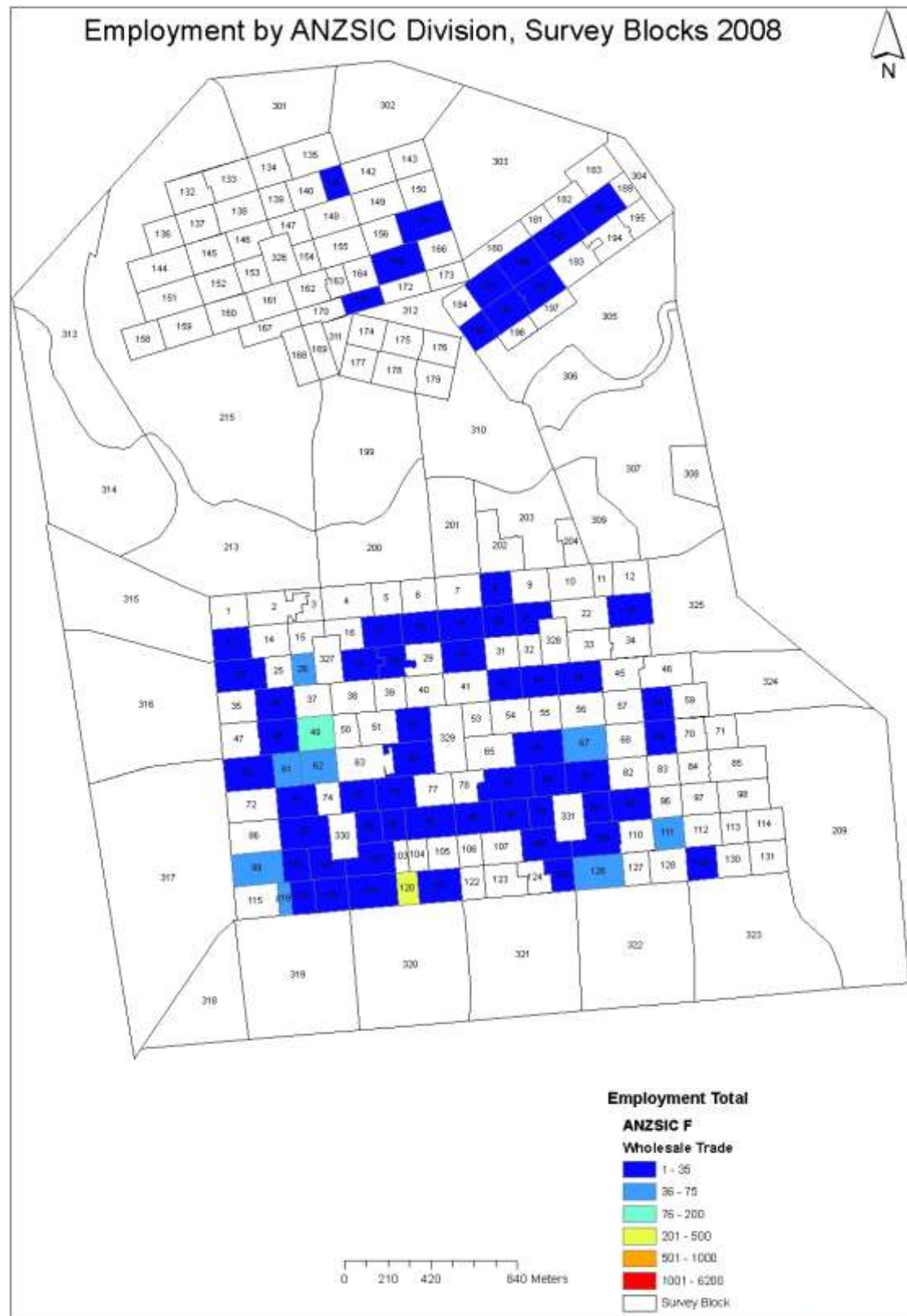
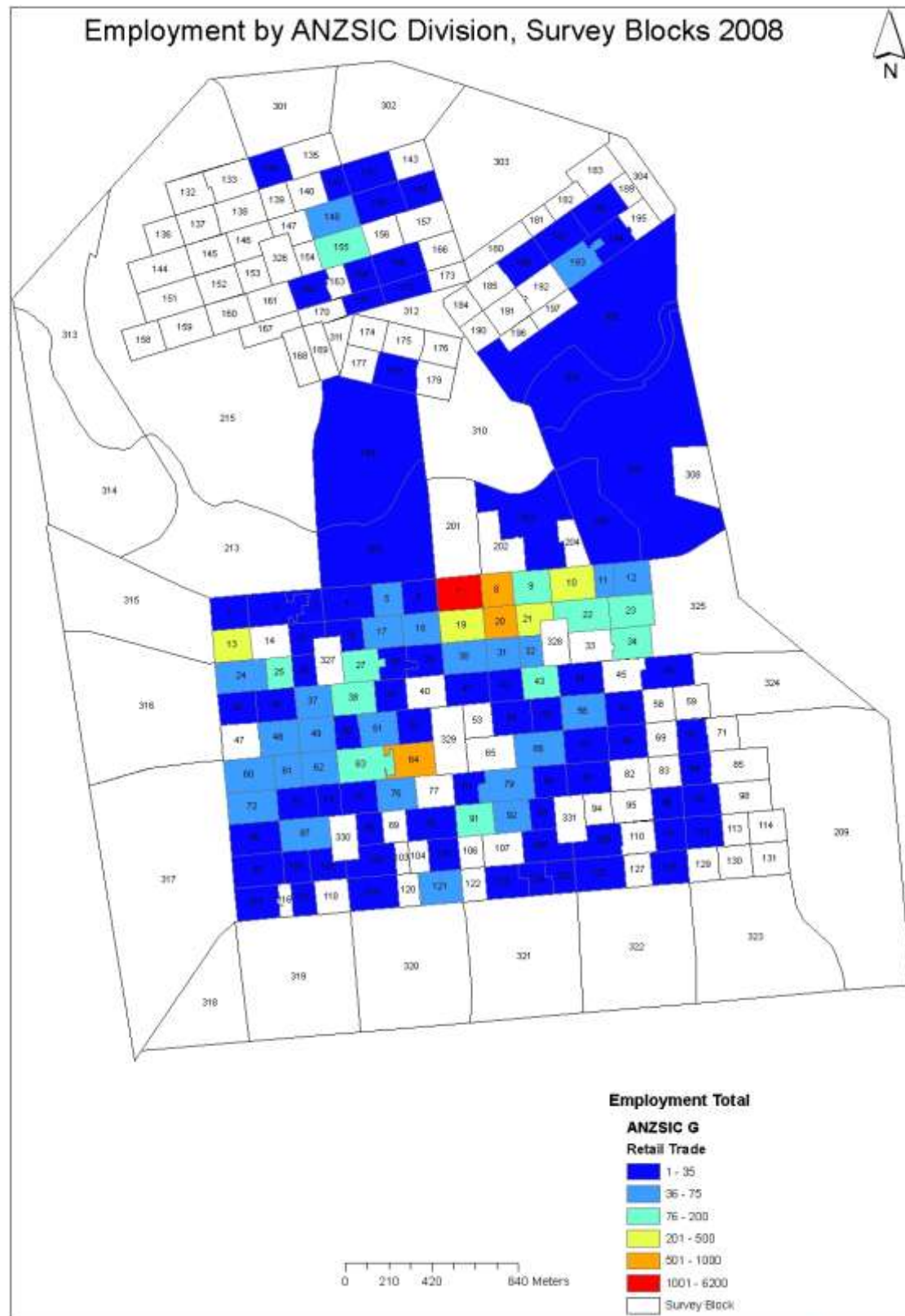
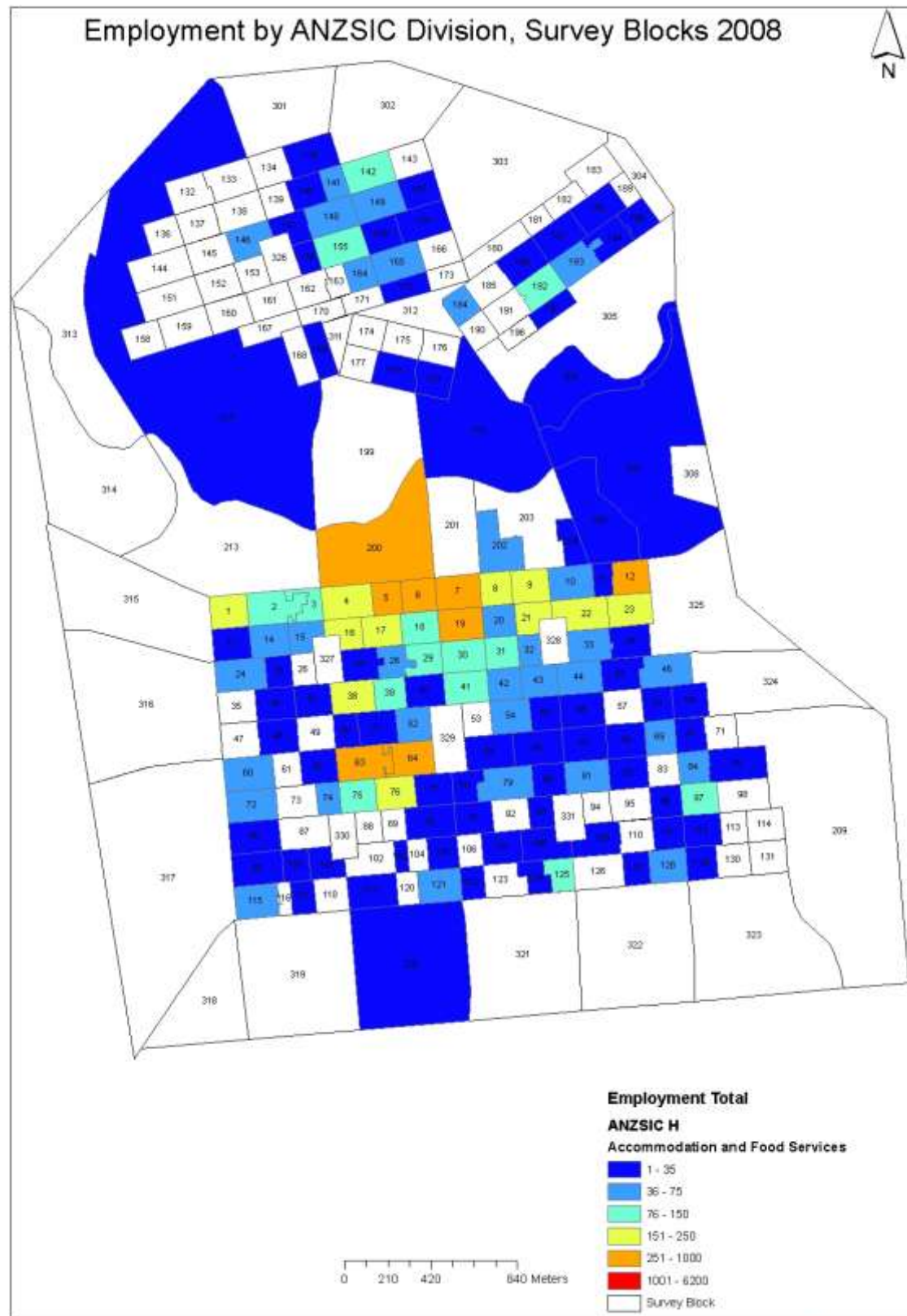


Figure 16: Employment ANZSIC Division G, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

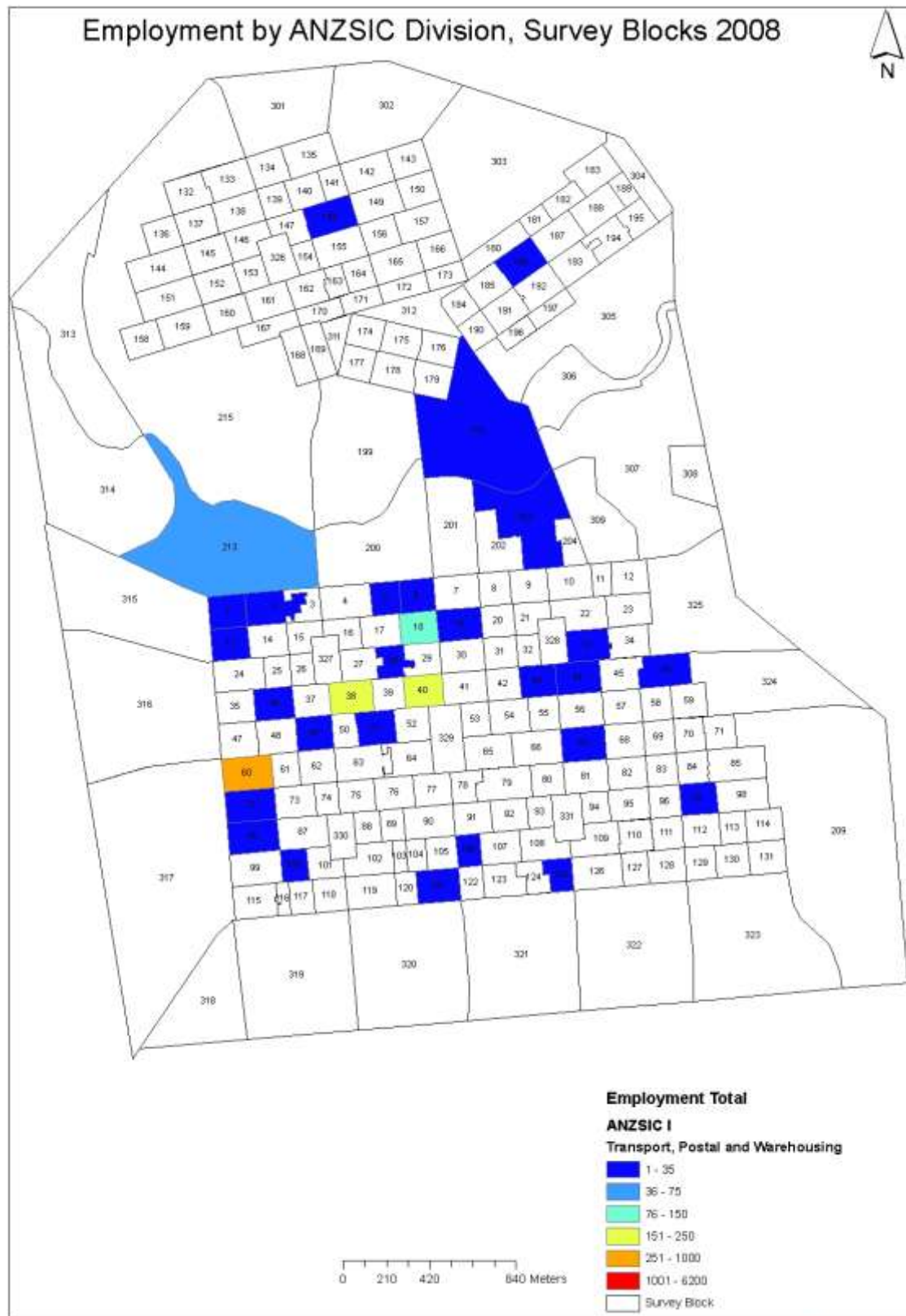
Figure 17: Employment ANZSIC Division H, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

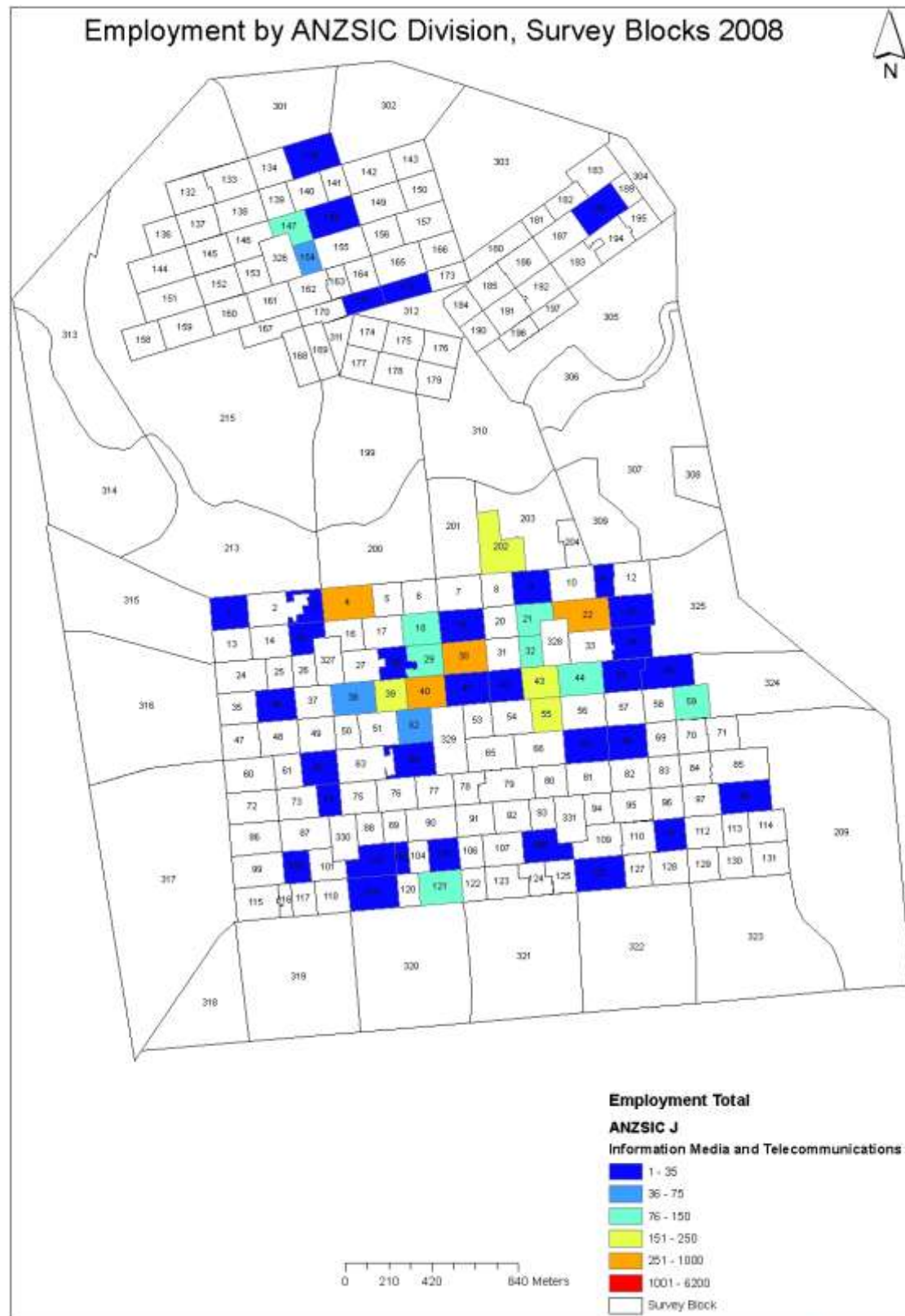


Figure 18: Employment ANZSIC Division I, 2008.



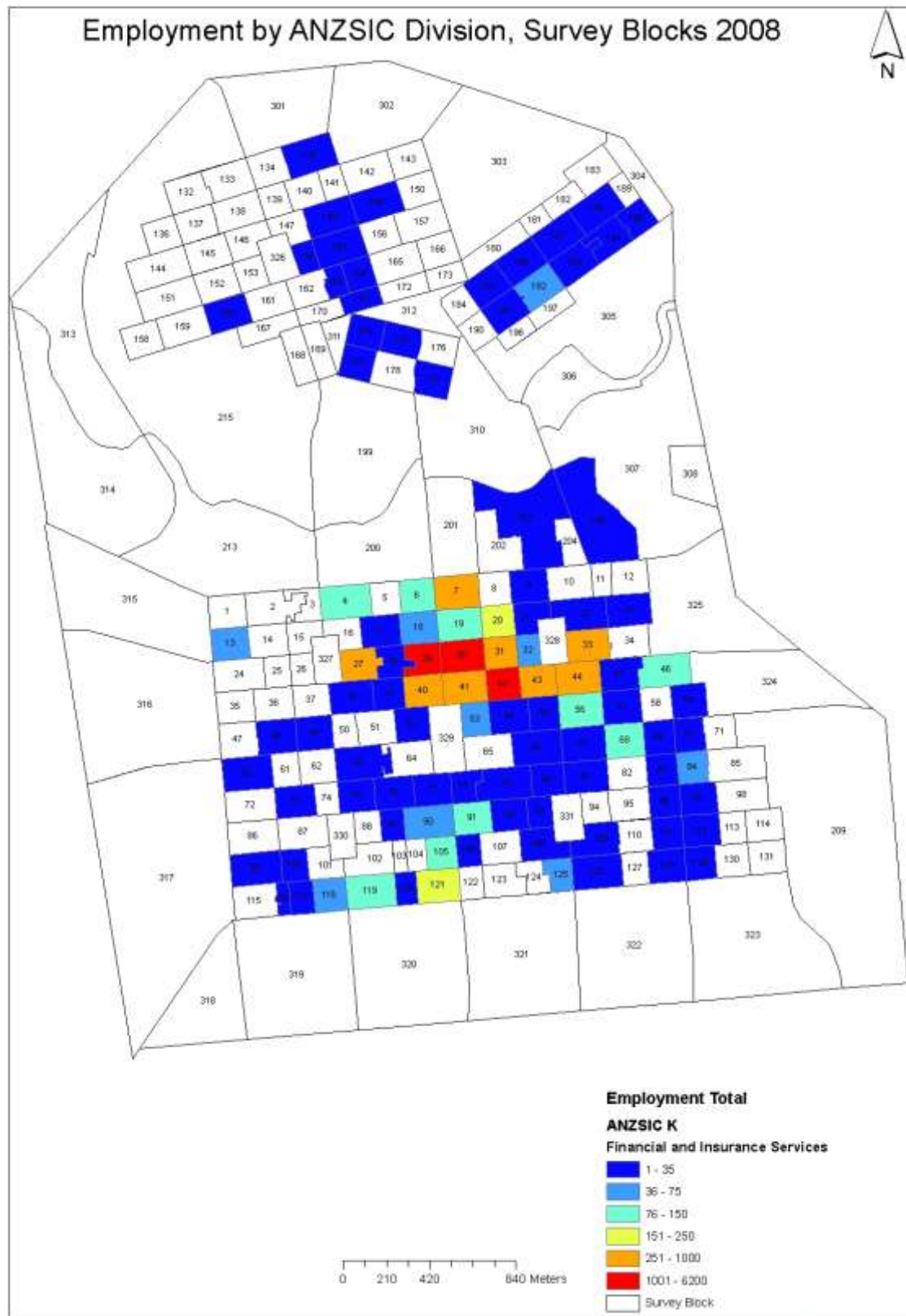
Source: Adelaide City Council, Land Use and Employment Census 2008

Figure 19: Employment ANZSIC Division J, 2008.



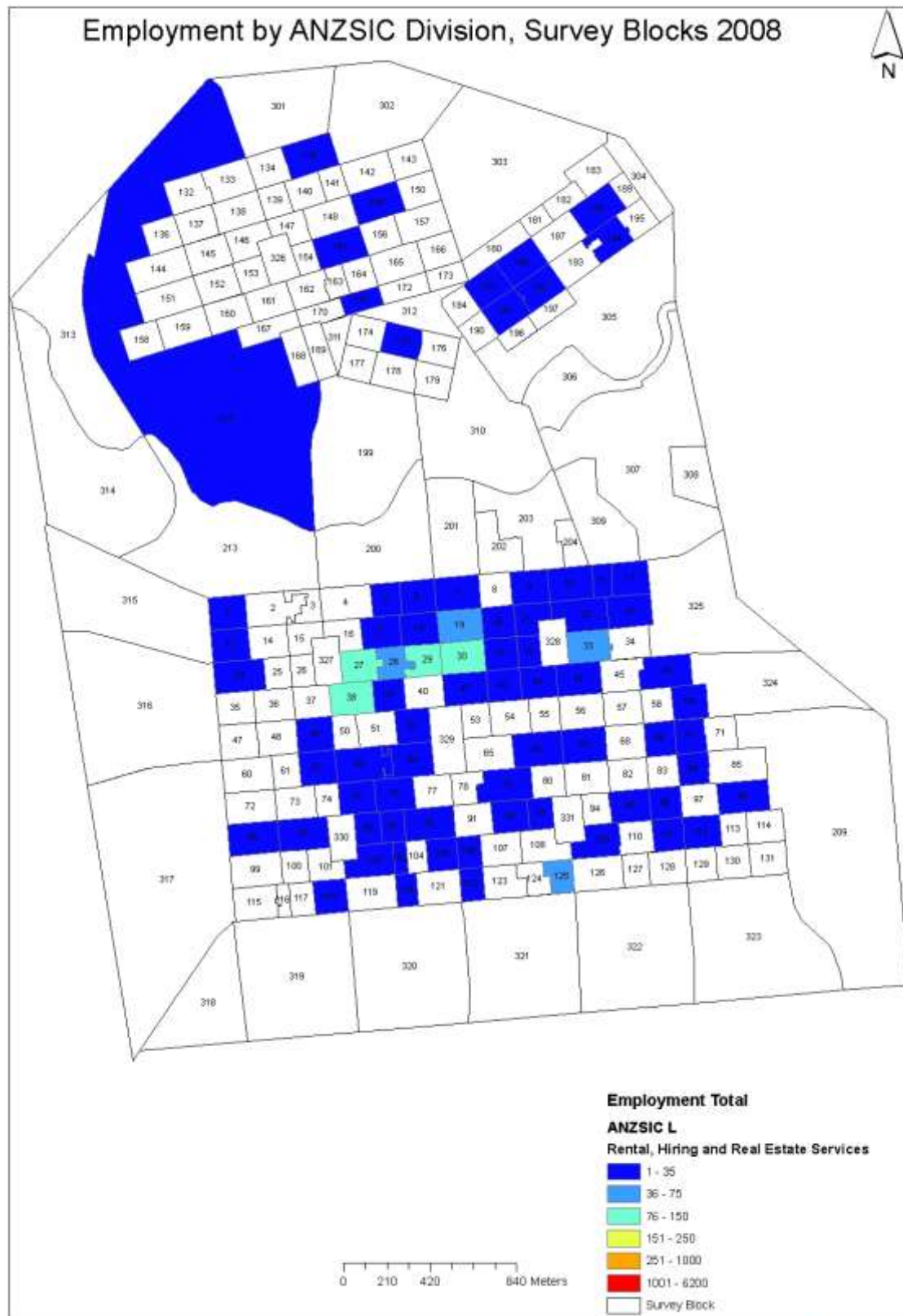
Source: Adelaide City Council, Land Use and Employment Census 2008

Figure 20: Employment ANZSIC Division K, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

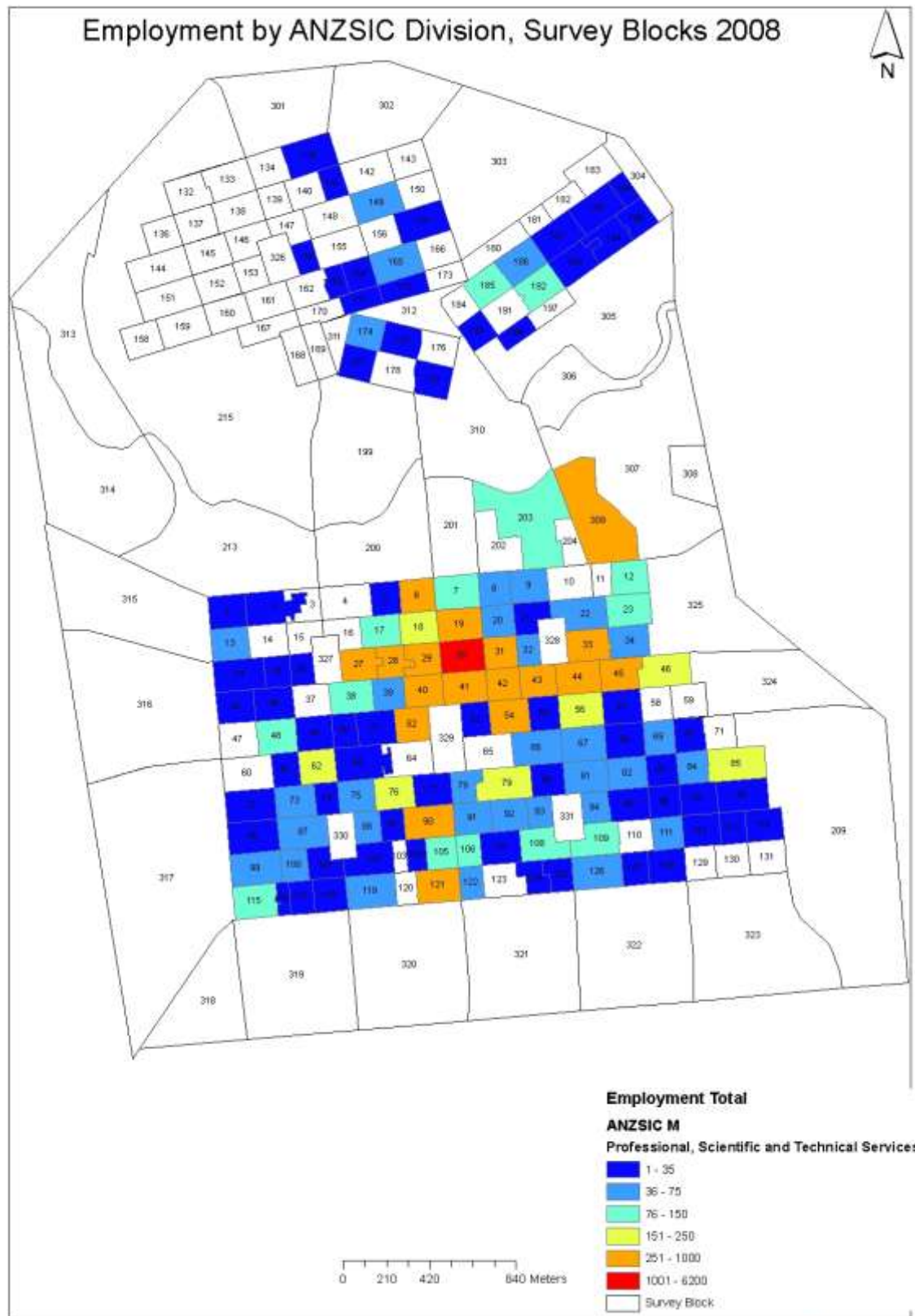
Figure 21: Employment ANZSIC Division L, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

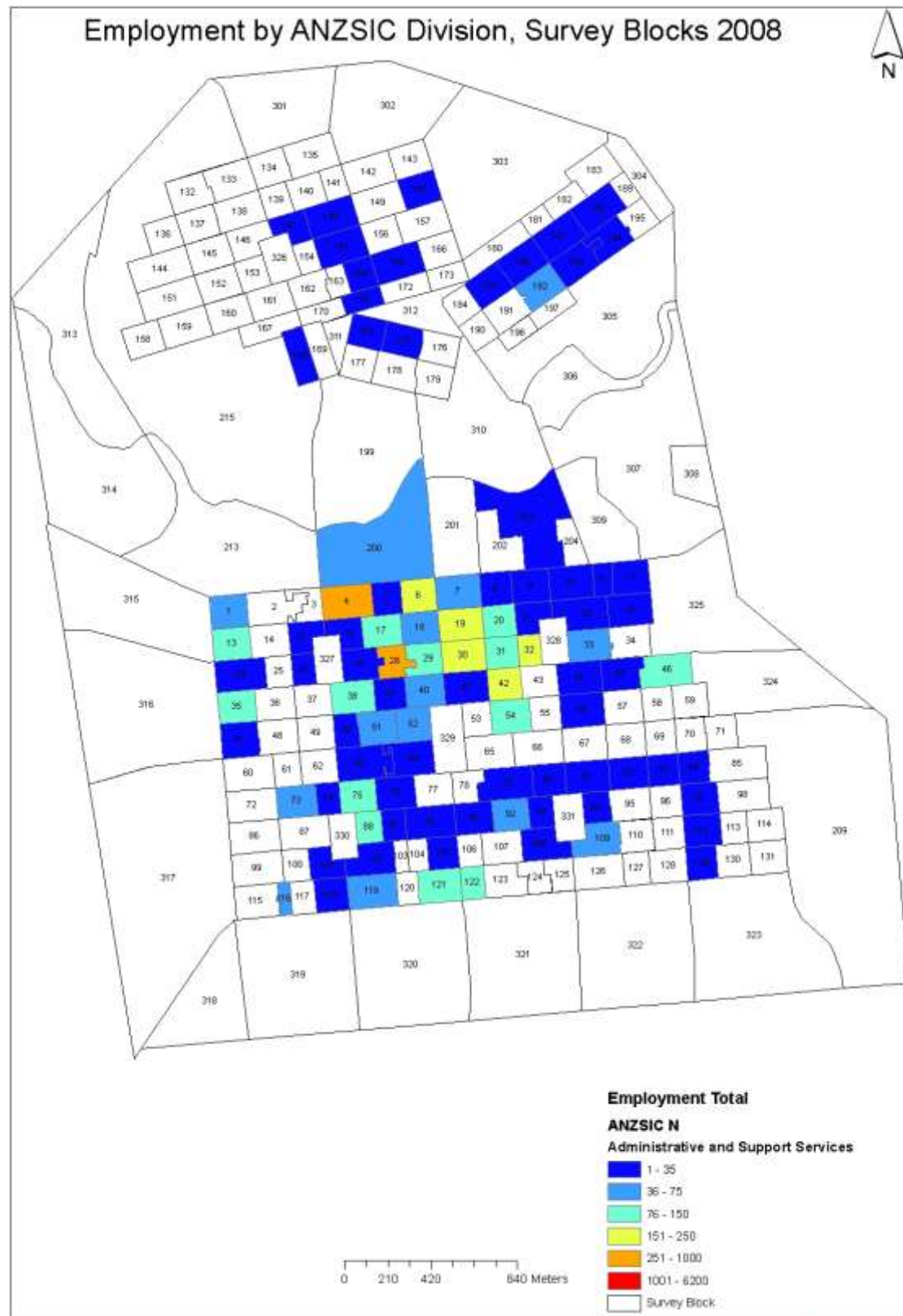


Figure 22: Employment ANZSIC Division M, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

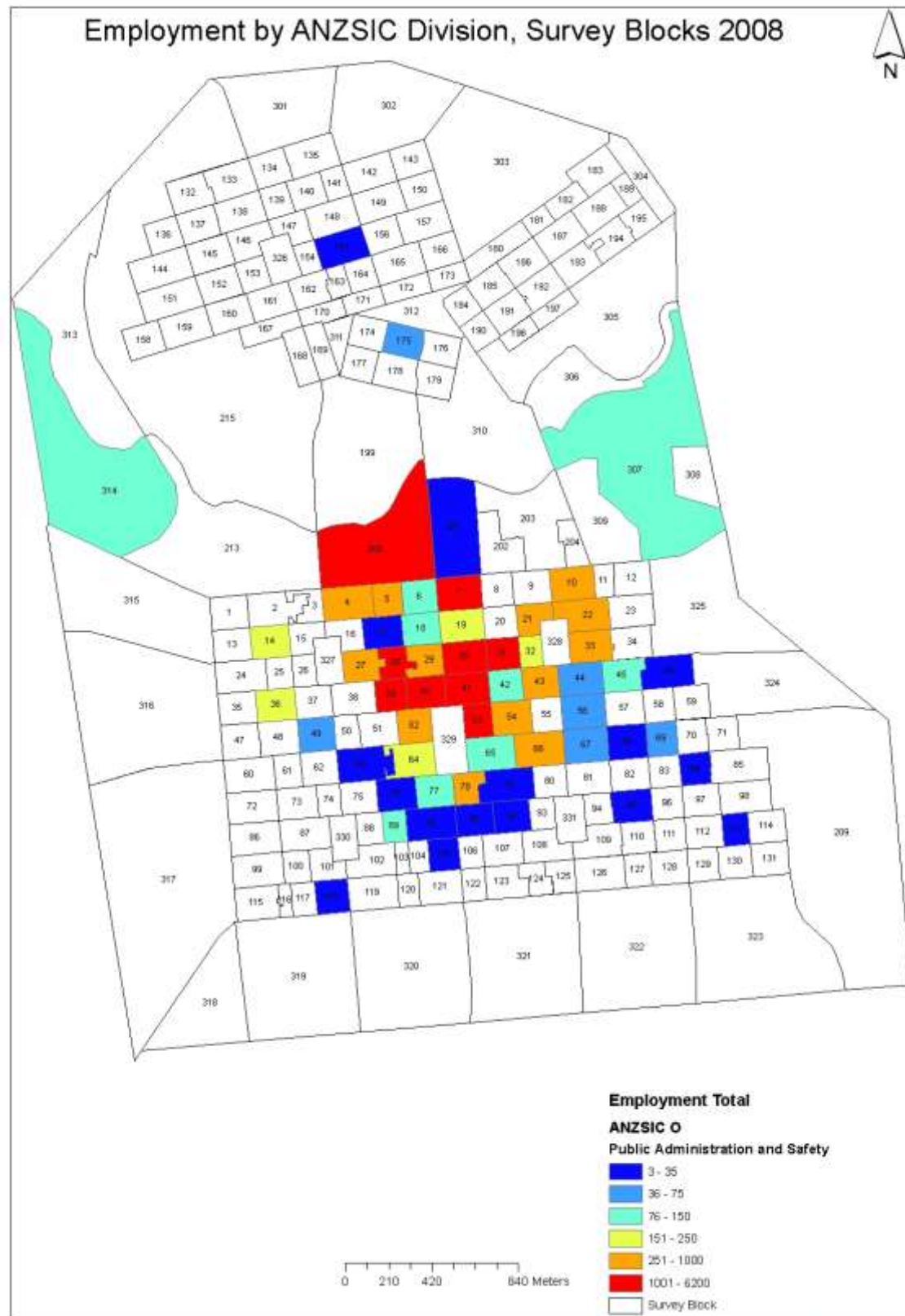
Figure 23: Employment ANZSIC Division N, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

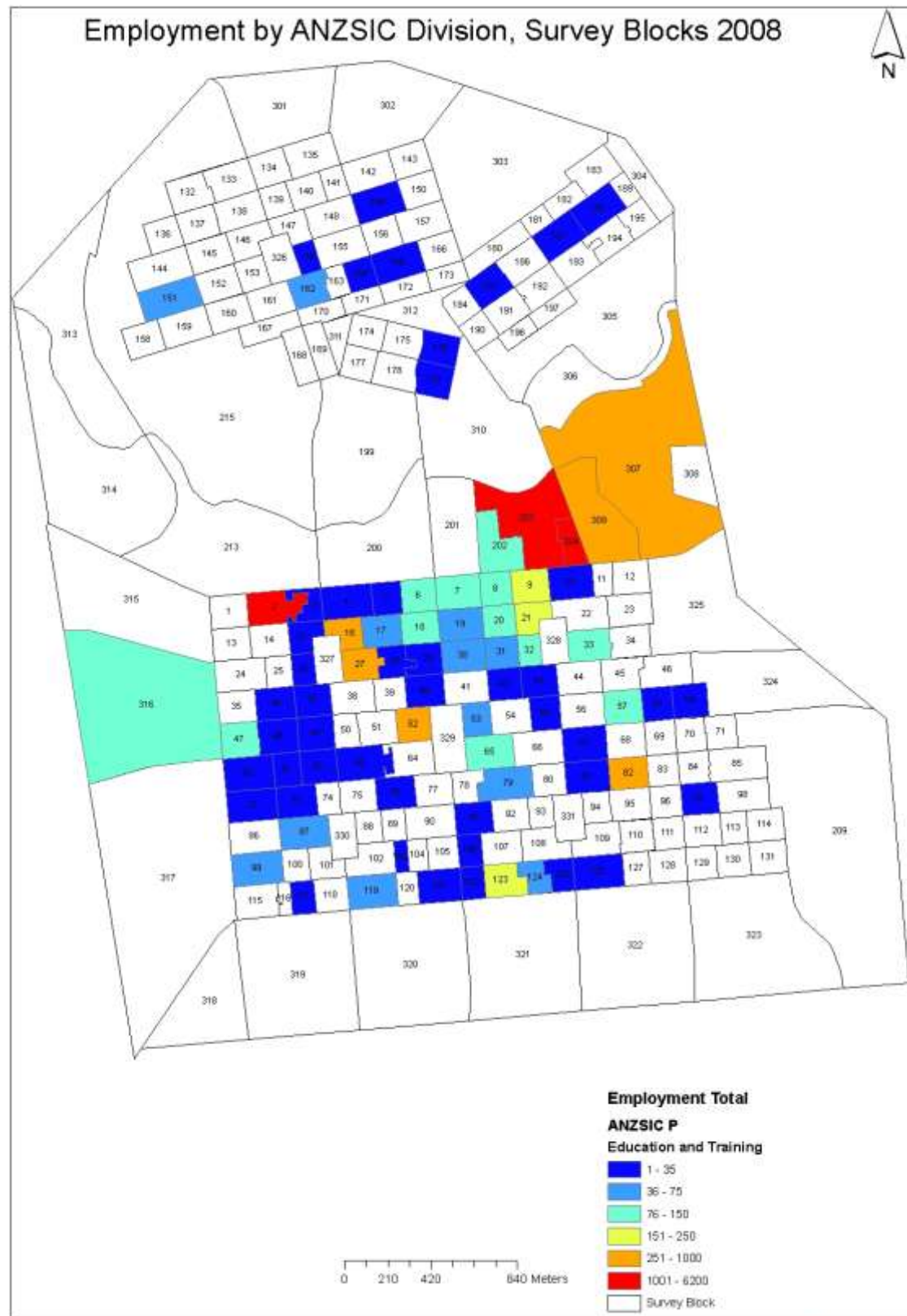


Figure 24: Employment ANZSIC Division O, 2008.



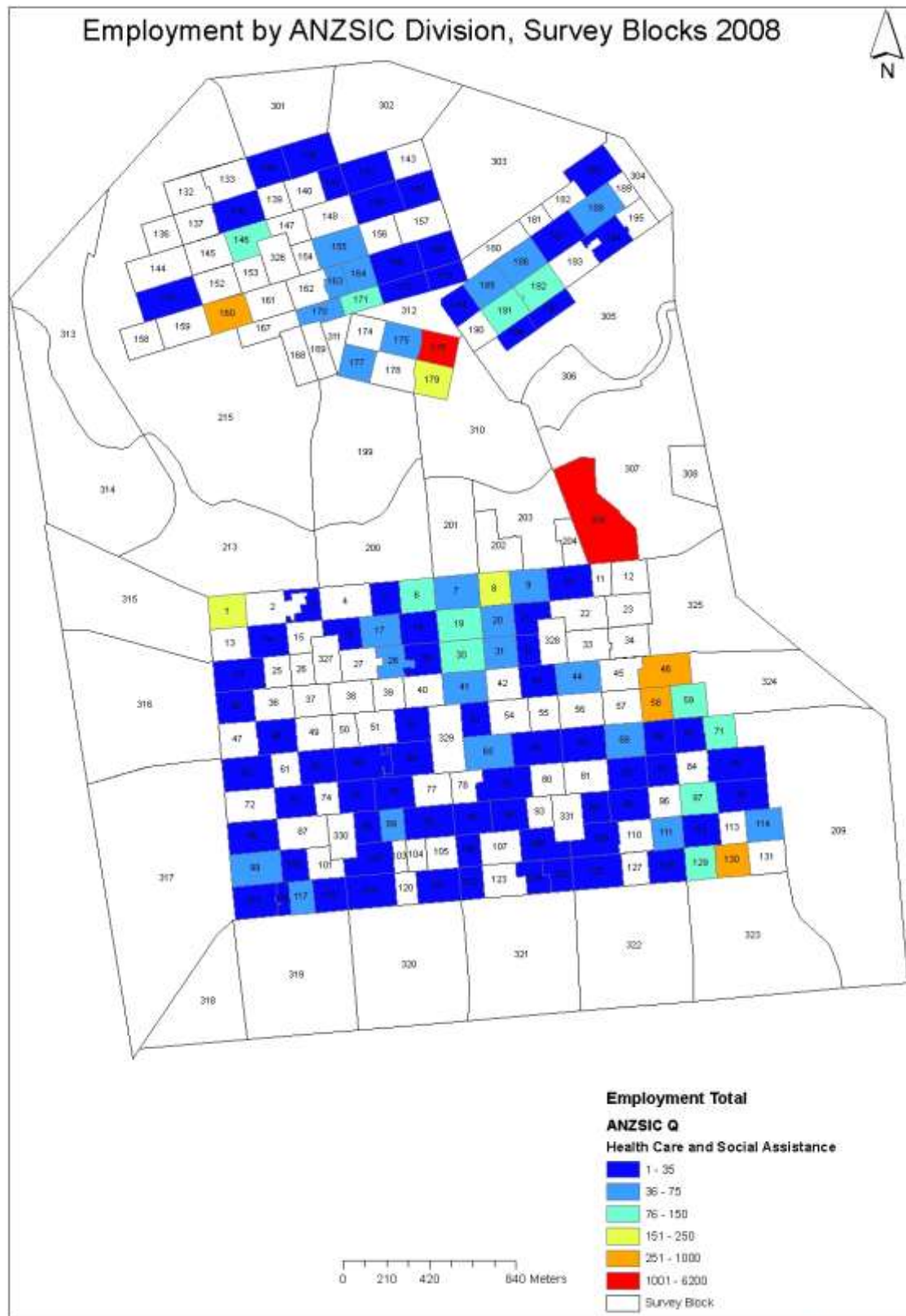
Source: Adelaide City Council, Land Use and Employment Census 2008

Figure 25: Employment ANZSIC Division P, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

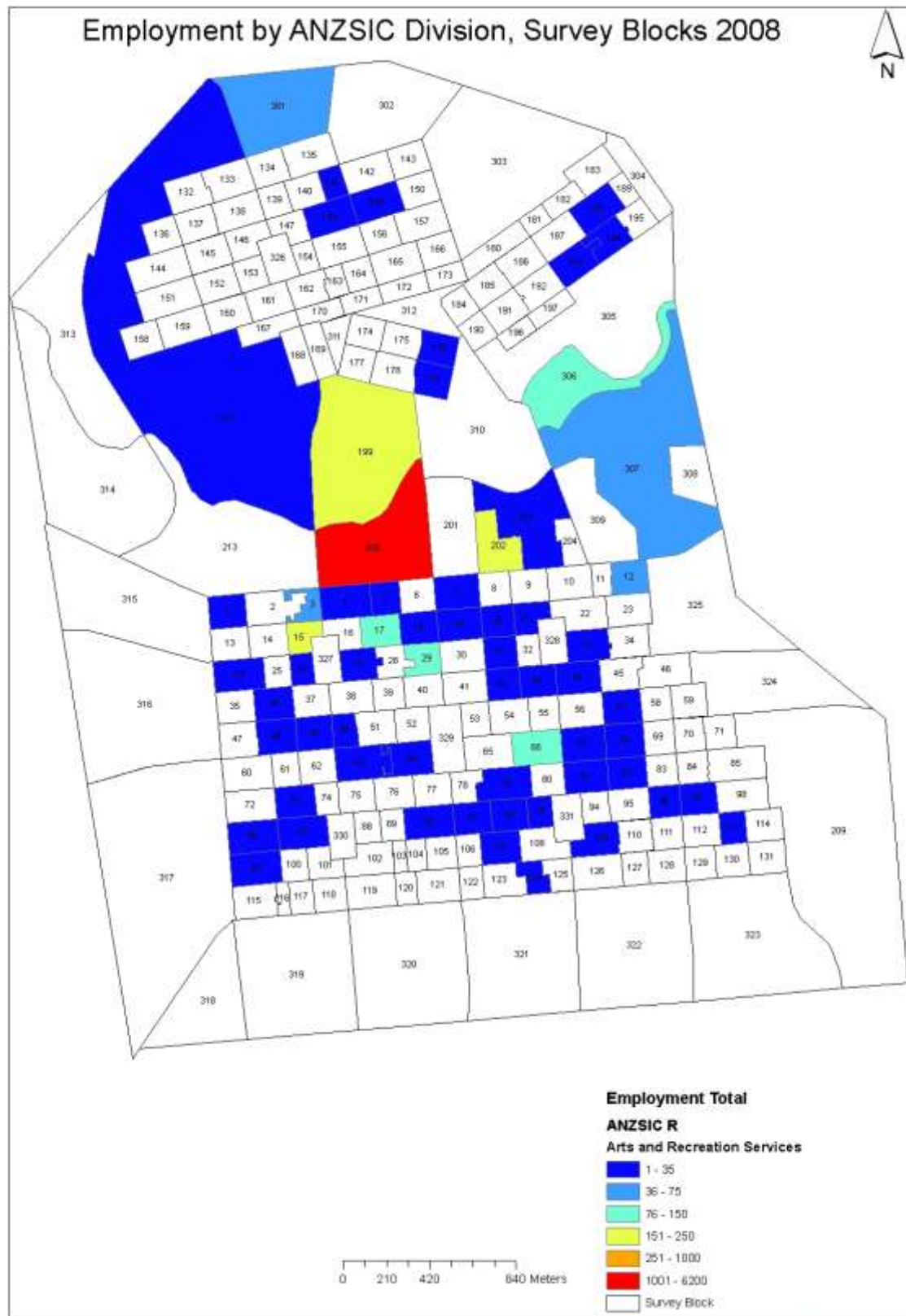
Figure 26: Employment ANZSIC Division Q, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

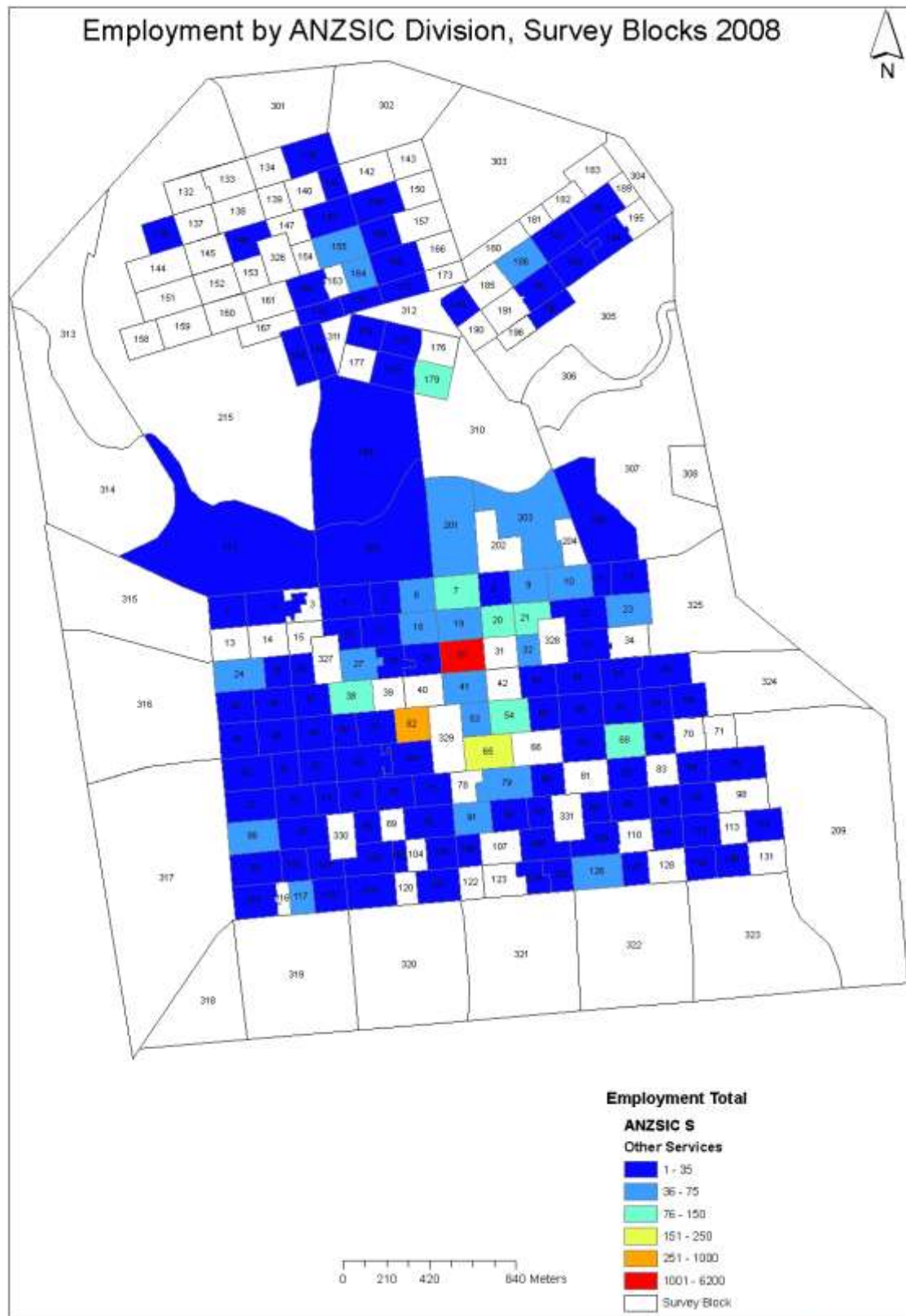


Figure 27: Employment ANZSIC Division R, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

Figure 28: Employment ANZSIC Division S, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008

## NIGHT ECONOMY

The night economy is those establishments that never close (such as the hospitals, police and emergency services), or close after 10.00 pm (restaurants, clubs, taverns, night clubs, theatres, casino and car parks), see Table 9 and Figure 29.

The night time economy:

- Increased by 2800 or 15 percent from 2006 to 2008.
- Was dominated by health and community services (57%).
- Retail (which includes restaurants) increased by 17 percent.
- Clubs, pubs, taverns and casino employment was relatively unchanged over the period.

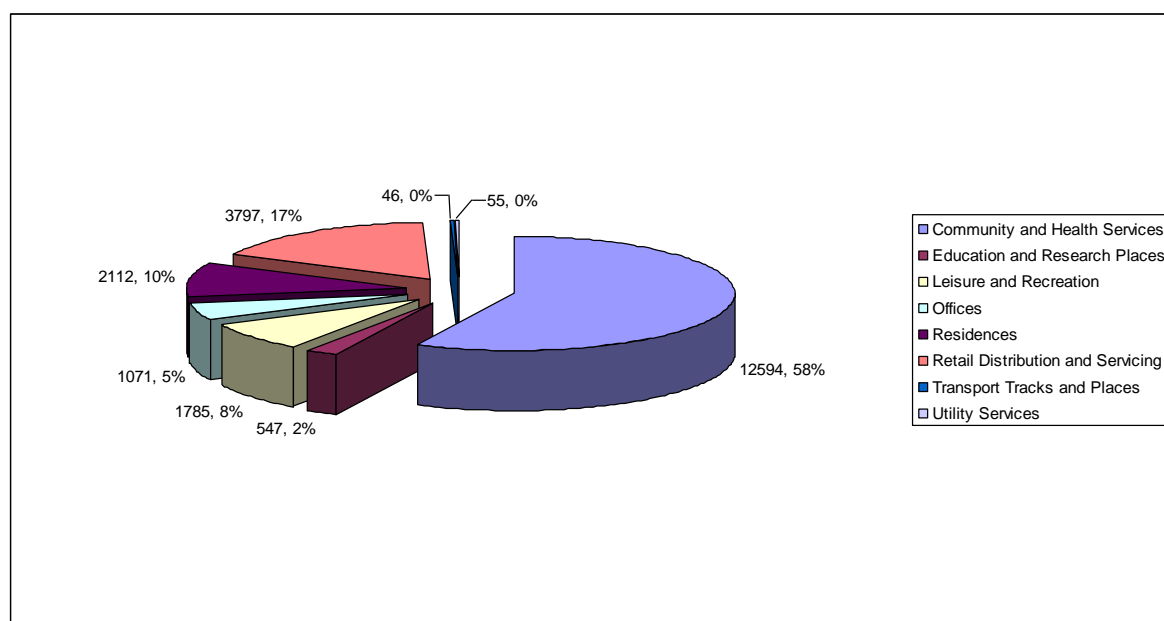
**Table 9: Adelaide City Night Time Employment by Land Use Group, 2006-2008.**

| Land Use Description            | 2006  |        | 2008  |        | Change | Percent |
|---------------------------------|-------|--------|-------|--------|--------|---------|
| Community & Health Services     | 12462 | 64.98  | 12594 | 57.23  | 132    | 1.06    |
| Education & Research Places     | 54    | 0.28   | 547   | 2.49   | 493*   | 912.96* |
| Leisure & Recreation            | 1818  | 9.48   | 1785  | 8.11   | -33    | -1.82   |
| Offices                         | 108   | 0.56   | 1071  | 4.87   | 963*   | 891.67* |
| Residences                      | 1779  | 9.28   | 2112  | 9.60   | 333    | 18.72   |
| Retail Distribution & Servicing | 2871  | 14.97  | 3797  | 17.25  | 926    | 32.25   |
| Transport Tracks and Places     | 85    | 0.44   | 101   | 0.46   | 16     | 18.82   |
| Total                           | 19177 | 100.00 | 22007 | 100.00 | 2830   | 14.76   |

\* Due to changes in classification and does not reflect actual employment change.

Transport includes commercial car park operations. Residences include accommodation places.  
Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

**Figure 29: Employment by Broad Land Use Group: Night Economy, 2008.**



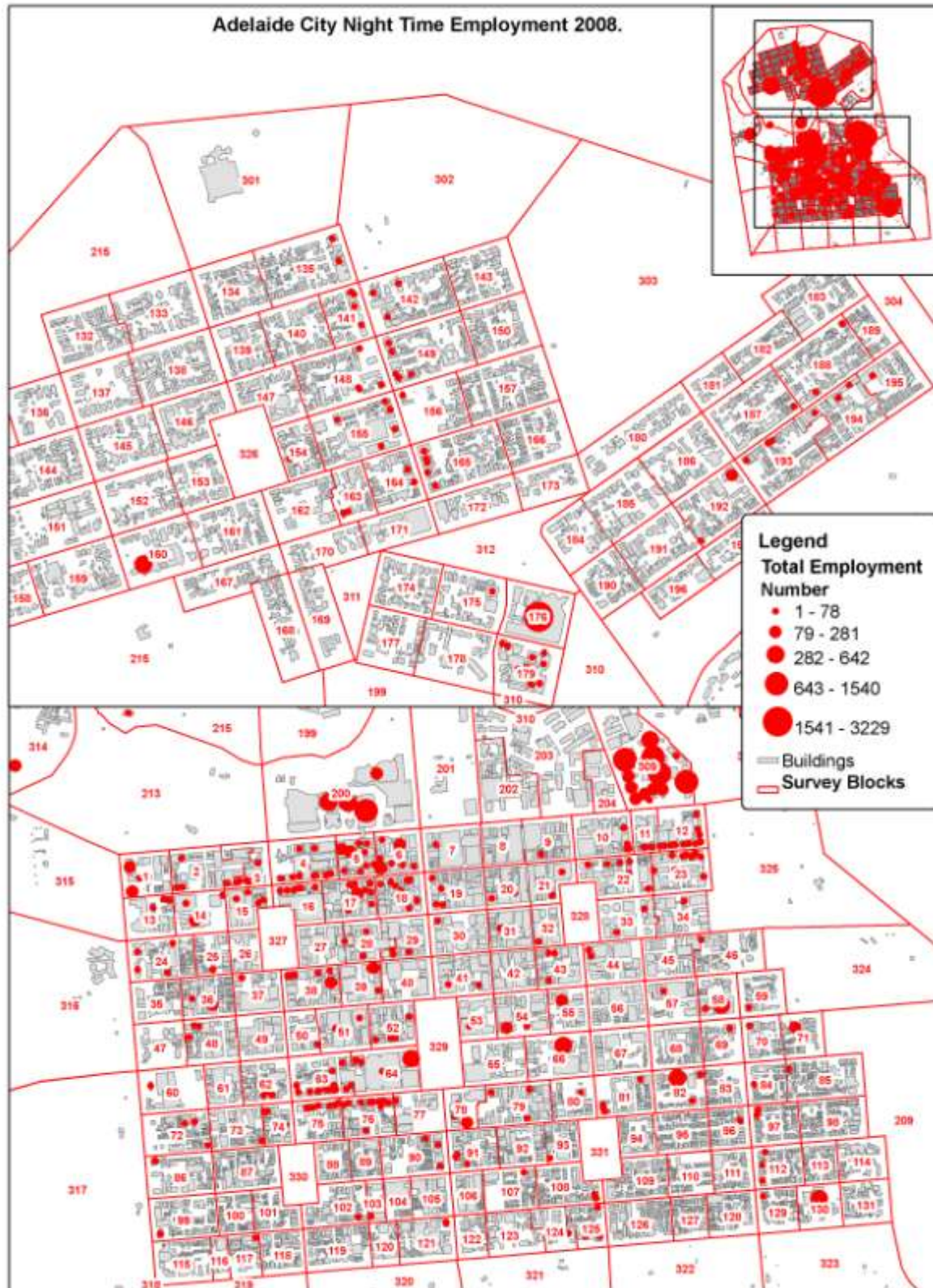
Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.



The location of night employment is displayed in Figures 30 and 31, which show total night time employment and employment in restaurants, clubs, taverns and night clubs. The night time economy was not distributed across the City but focussed in a few key areas:

- Community and health employment at the major hospital locations (blocks 160, 176, 179, 309 and 130).
- Hindley Street, Rundle Road, Gouger Street and the North Adelaide strip shopping areas of O'Connell Street and Melbourne Street.
- Figure 31 highlights the night time entertainment areas of Hindley Street, Gouger Street and Rundle Street.

Figure 30: Night Employment by Broad Land Use Group, 2008.

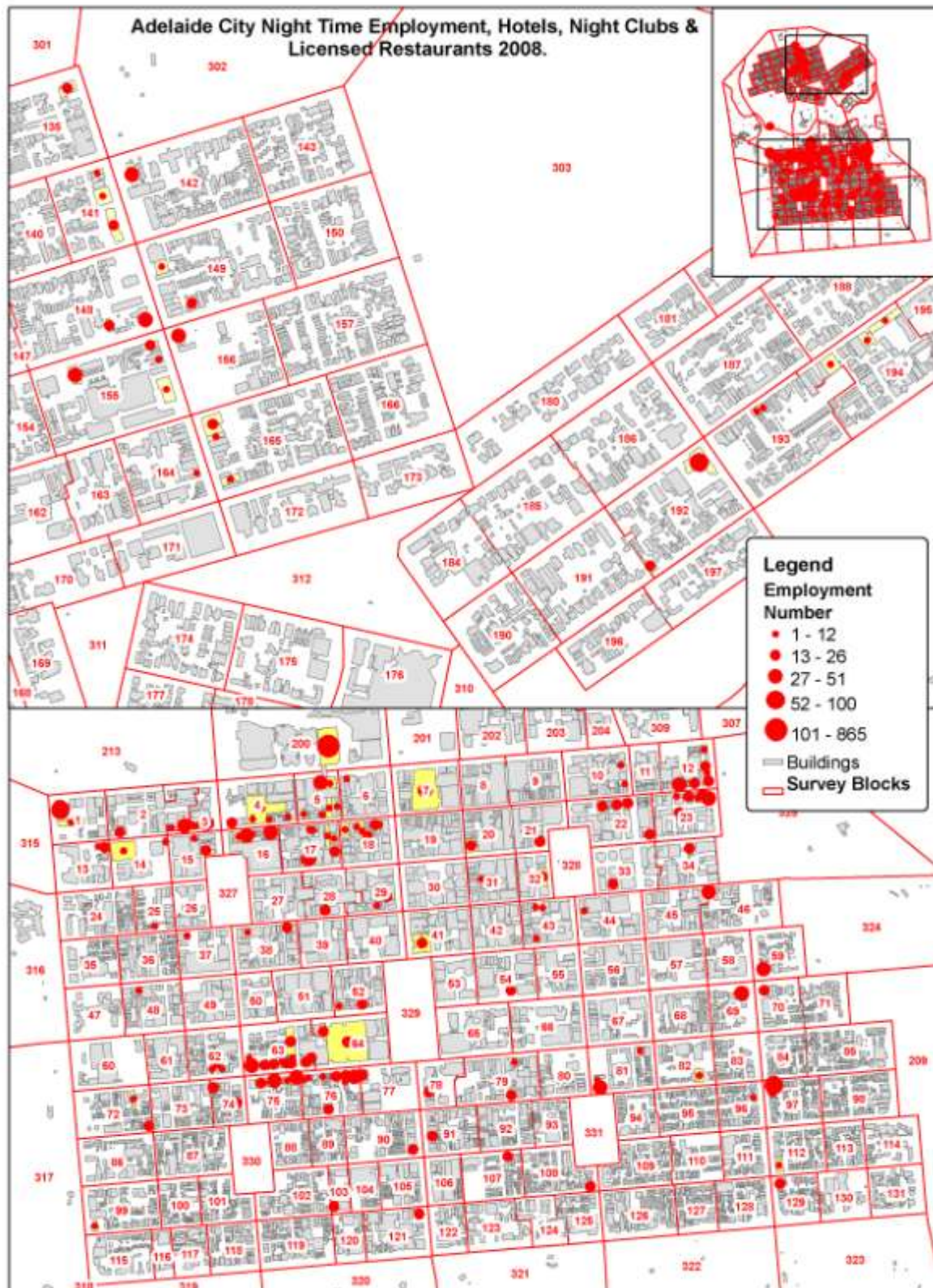


NB: Establishments with a closing time of 10.00 PM or later.

Source: Adelaide City Council, Land Use and Employment Census 2008.



Figure 31: Night Employment Leisure and Recreation, 2008.



NB: Establishments with a closing time of 10.00 PM or later.

Source: Adelaide City Council, Land Use and Employment Census 2008.

## CAR PARKING

Car parking in Adelaide (not including on-street parking) increased by 1100 spaces between 2006 and 2008 (Table 10). The allocation of parking to a land use class will not always reflect the actual parking function and is more likely to reflect the land use of the establishment using the space. This is certainly the case with spaces leased by office and retail establishments. Other highlights include:

- Transport (which includes commercial car parks) is the major land use group with 65 percent of spaces.
- Transport parking increased by 1100 spaces.
- Residential parking increased by 400 spaces.

**Table 10: Adelaide City Car Parking Change, 2006-2008.**

| Land Use Class                    | 2006  |         | 2008  |         | Change |         |
|-----------------------------------|-------|---------|-------|---------|--------|---------|
|                                   | No    | Percent | No    | Percent | No     | Percent |
| Agriculture and Fisheries         | 21    | 0.04    | 19    | 0.03    | -2     | -9.52   |
| Community and Health Services     | 1725  | 3.20    | 1945  | 3.53    | 220    | 12.75   |
| Defence                           | 0     | 0.00    | 2     | 0.00    | 2      | 0.00    |
| Education and Research Places     | 957   | 1.77    | 896   | 1.62    | -61    | -6.37   |
| Leisure and Recreation            | 1161  | 2.15    | 1223  | 2.22    | 62     | 5.34    |
| Manufacturing                     | 151   | 0.28    | 205   | 0.37    | 54     | 35.76   |
| Offices                           | 4977  | 9.22    | 4235  | 7.68    | -742   | -14.91  |
| Residences                        | 7872  | 14.58   | 8282  | 15.01   | 410    | 5.21    |
| Retail Distribution and Servicing | 1579  | 2.93    | 1647  | 2.99    | 68     | 4.31    |
| Storage                           | 95    | 0.18    | 99    | 0.18    | 4      | 4.21    |
| Transport Tracks and Places       | 34537 | 63.98   | 35657 | 64.64   | 1120   | 3.24    |
| Unused Land and Property          | 99    | 0.18    | 120   | 0.22    | 21     | 21.21   |
| Utility Services                  | 680   | 1.26    | 665   | 1.21    | -15    | -2.21   |
| Wholesale Distribution            | 126   | 0.23    | 164   | 0.30    | 38     | 30.16   |
| Total                             | 53980 | 100.00  | 55159 | 100.00  | 1179   | 2.18    |

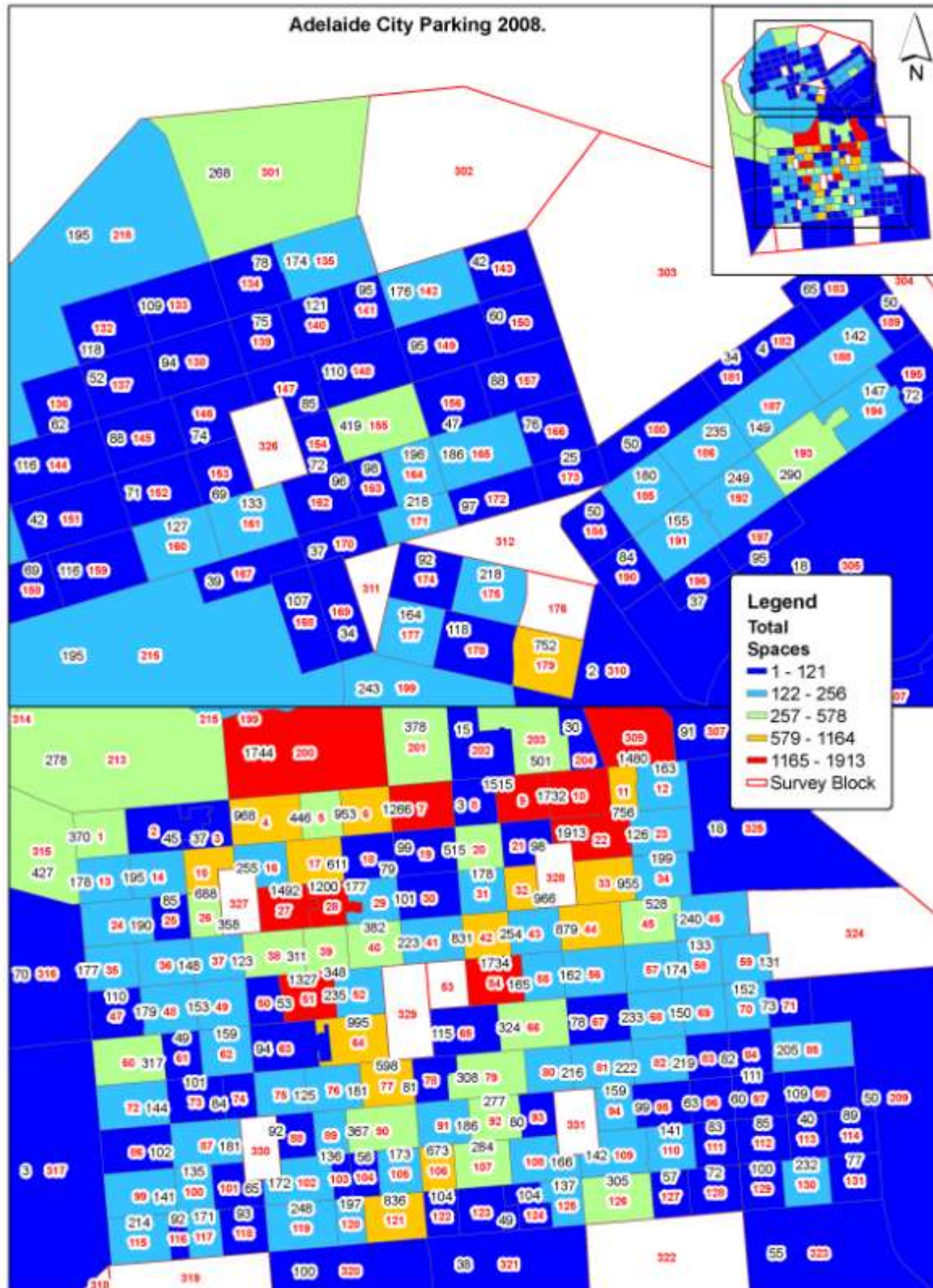
NB: change may reflect both a change in classification from 2006 to 2008 as well as actual change, for example the change in office is more likely due to classification change and not a loss of car parking whereas the increase in residential parking would reflect an actual increase.

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

Figures 32 to 44 display parking spaces by broad land use group. These maps highlight the location of parking associated with these activity groups and often reflect either building parking or spaces leased in the larger commercial car parks. A good example of this is the Royal Adelaide Hospital (block 309) which has a multi level car park and total spaces of 1480 (Figure 32), but only 24 spaces allocated to community service parking (Figure 33). In this case the parking is allocated to transport as a major commercial car park.



Figure 32: Total Car Parking spaces, 2008.

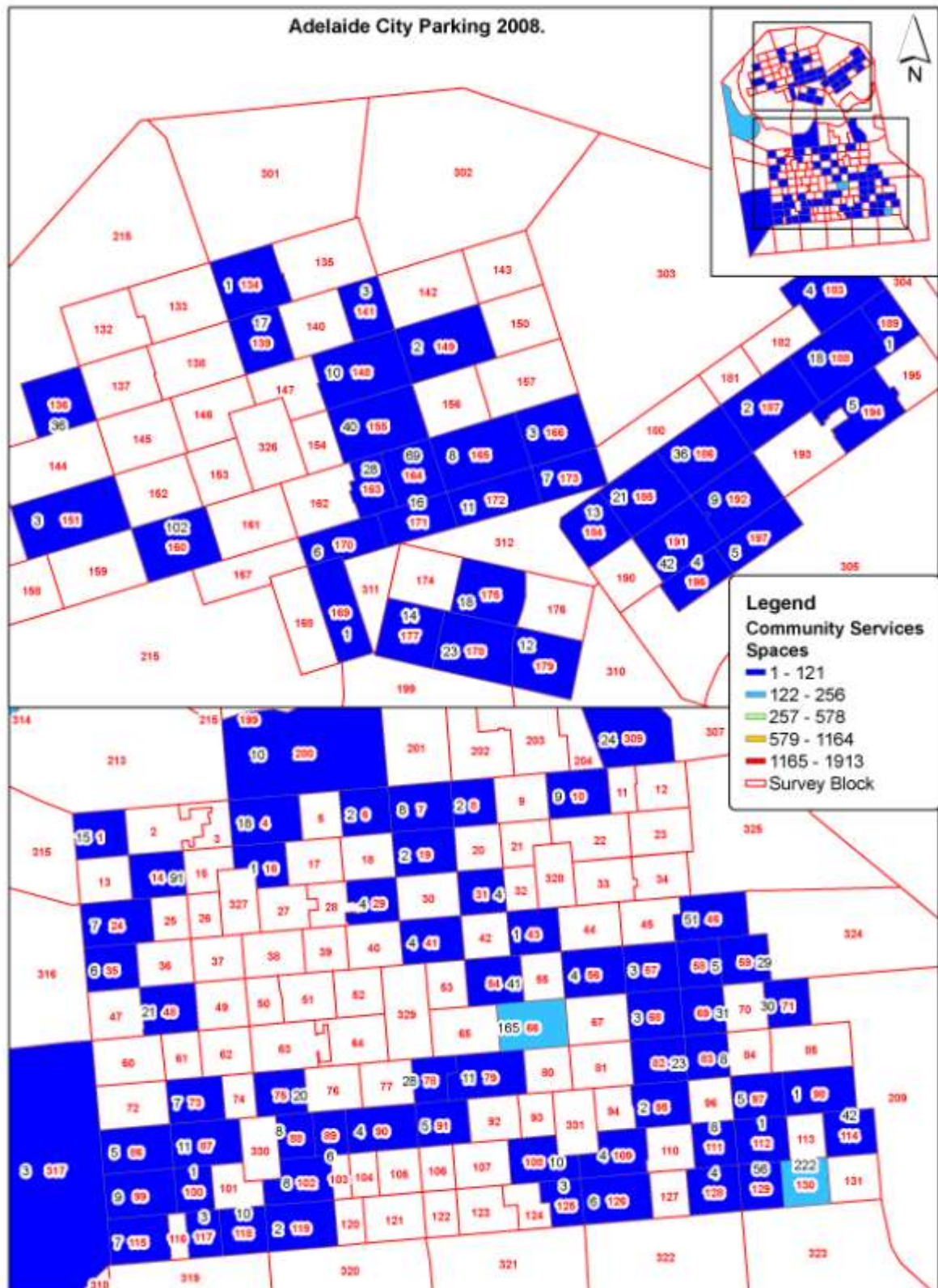


NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.



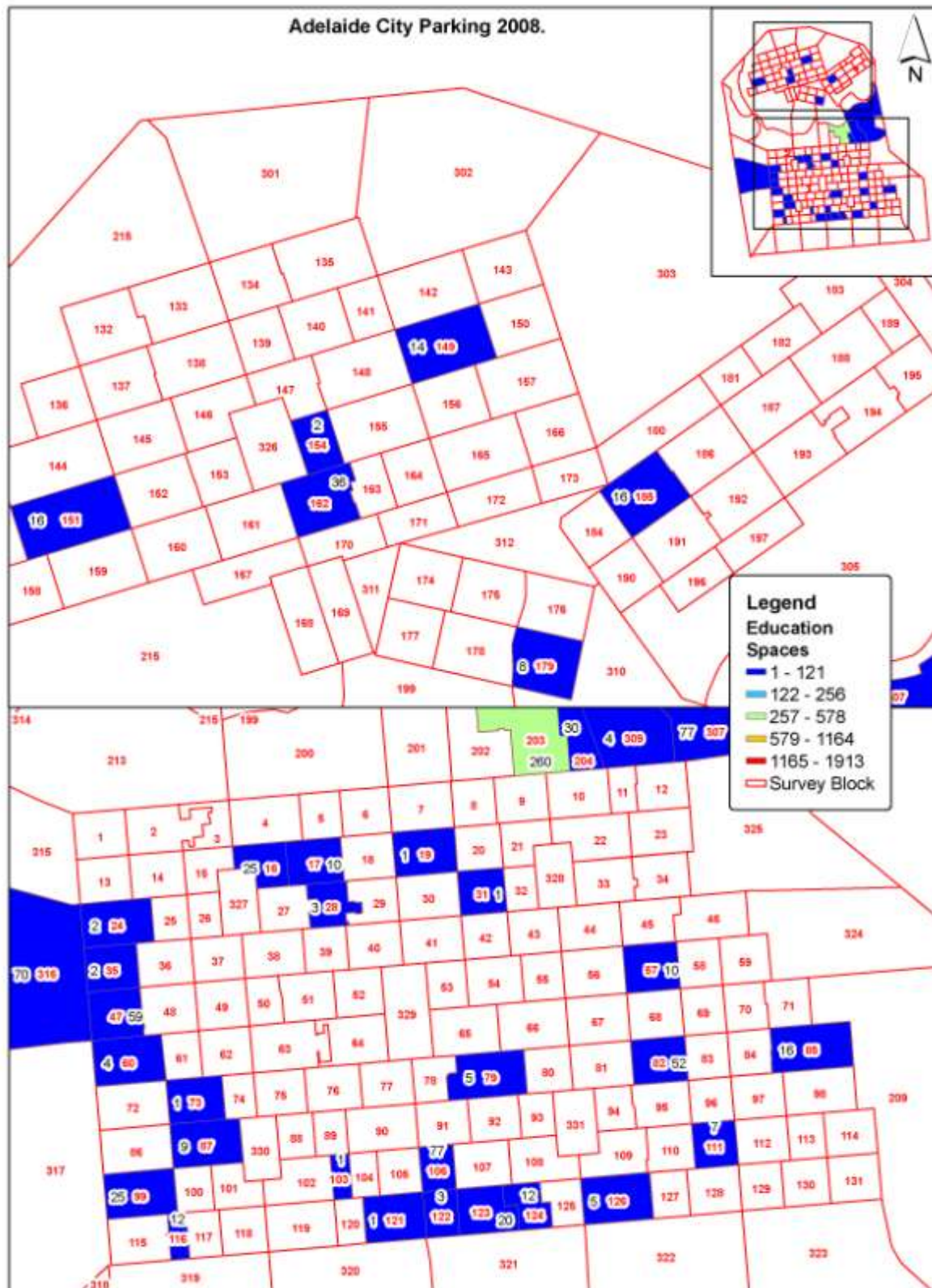
Figure 33: Total Community Services and Health Car Parking spaces, 2008.



NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.

Figure 34: Total Education and Training Car Parking spaces, 2008.

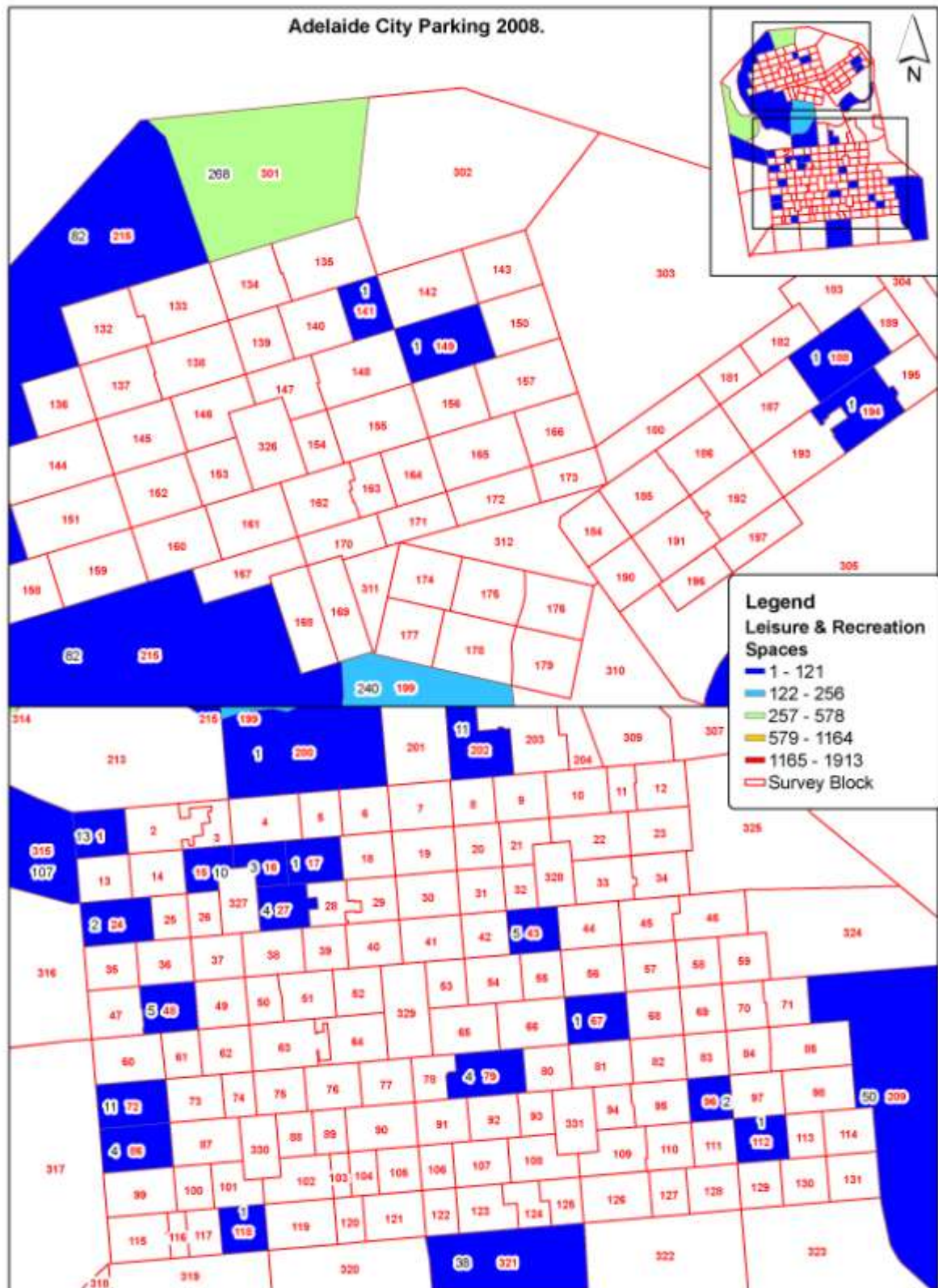


NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.



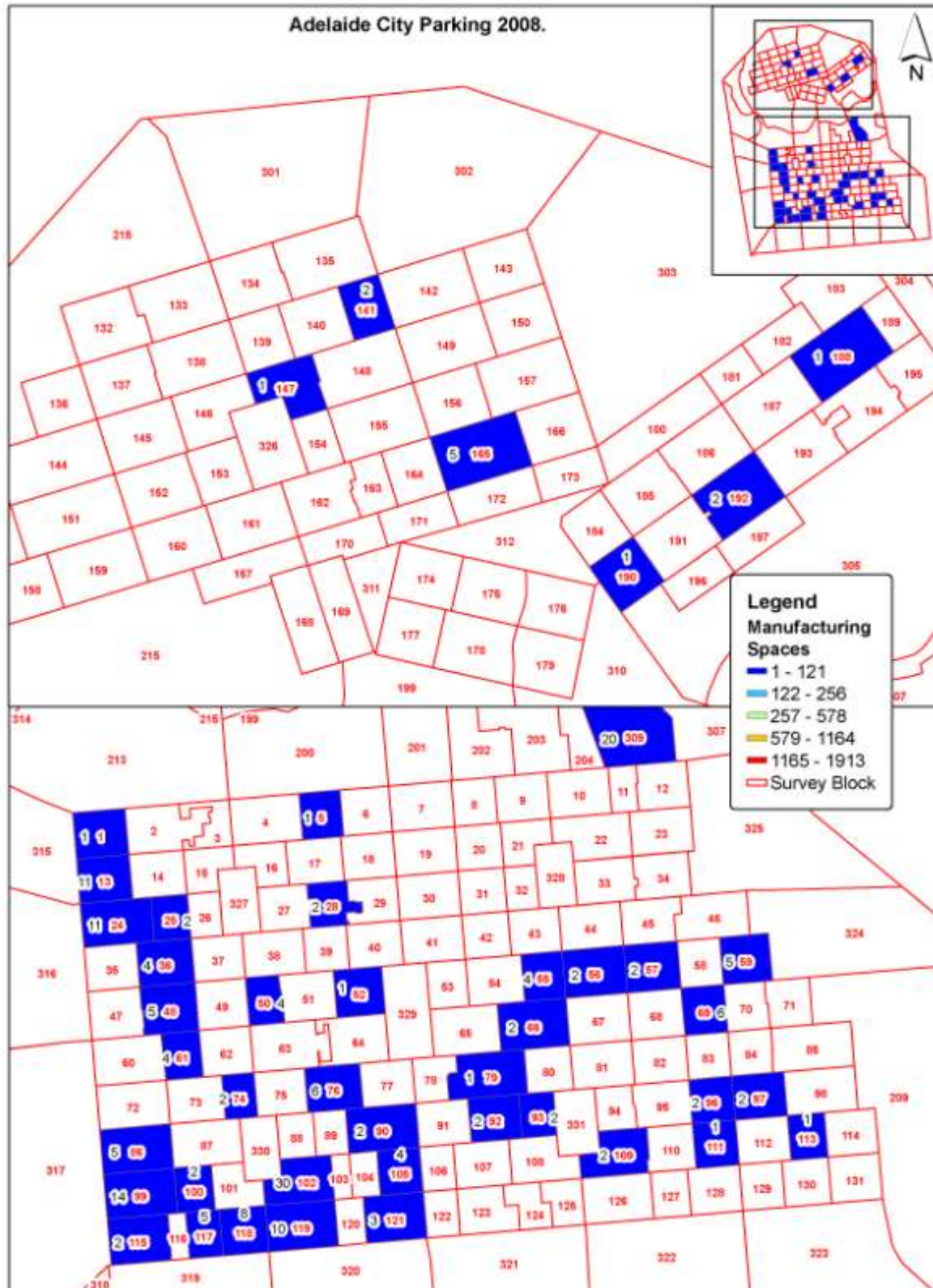
Figure 35: Total Leisure and Recreation Car Parking spaces, 2008.



NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.

Figure 36: Total Manufacturing Car Parking spaces, 2008.

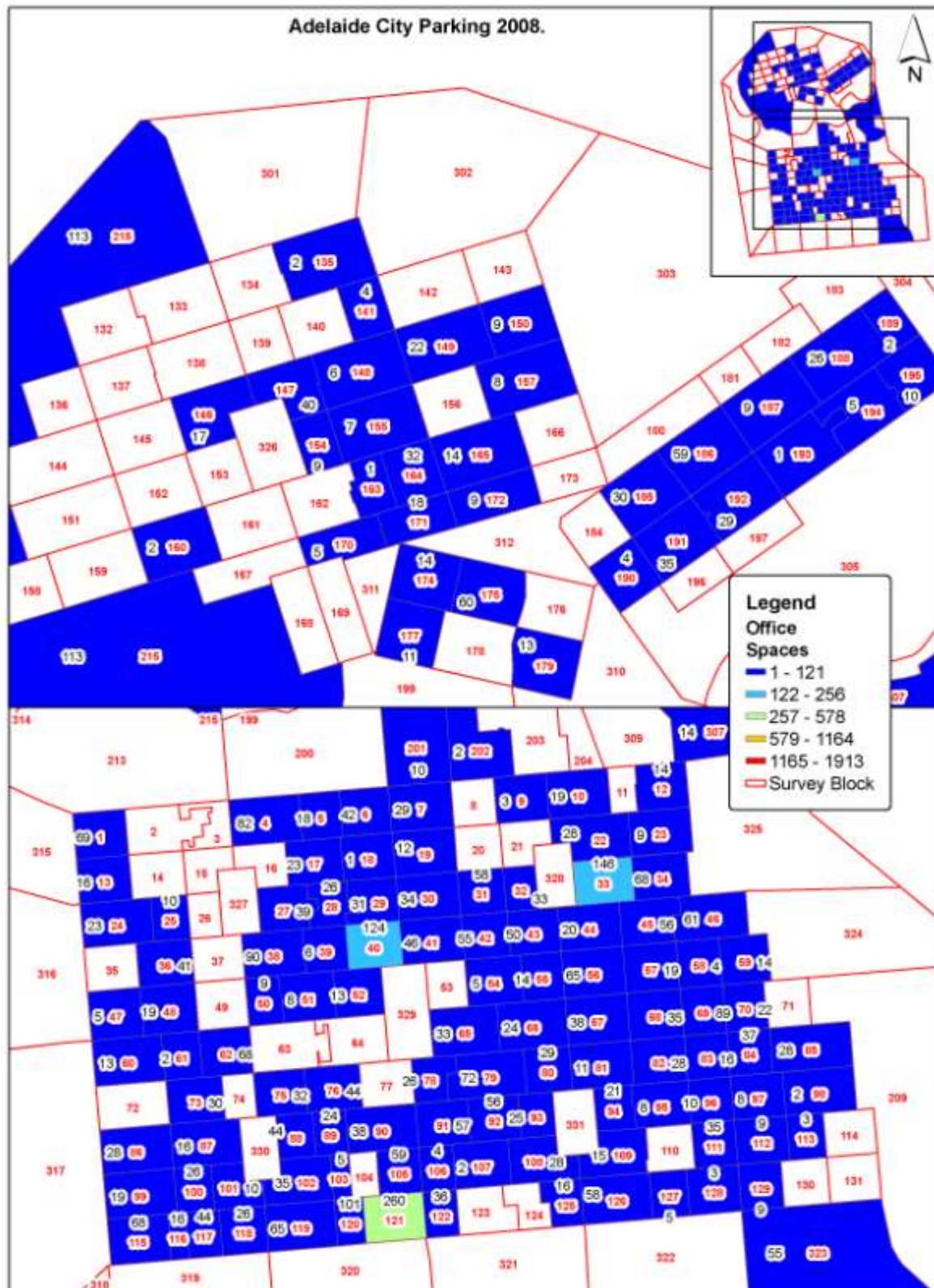


NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.



Figure 37: Total Office Space Car Parking spaces, 2008.

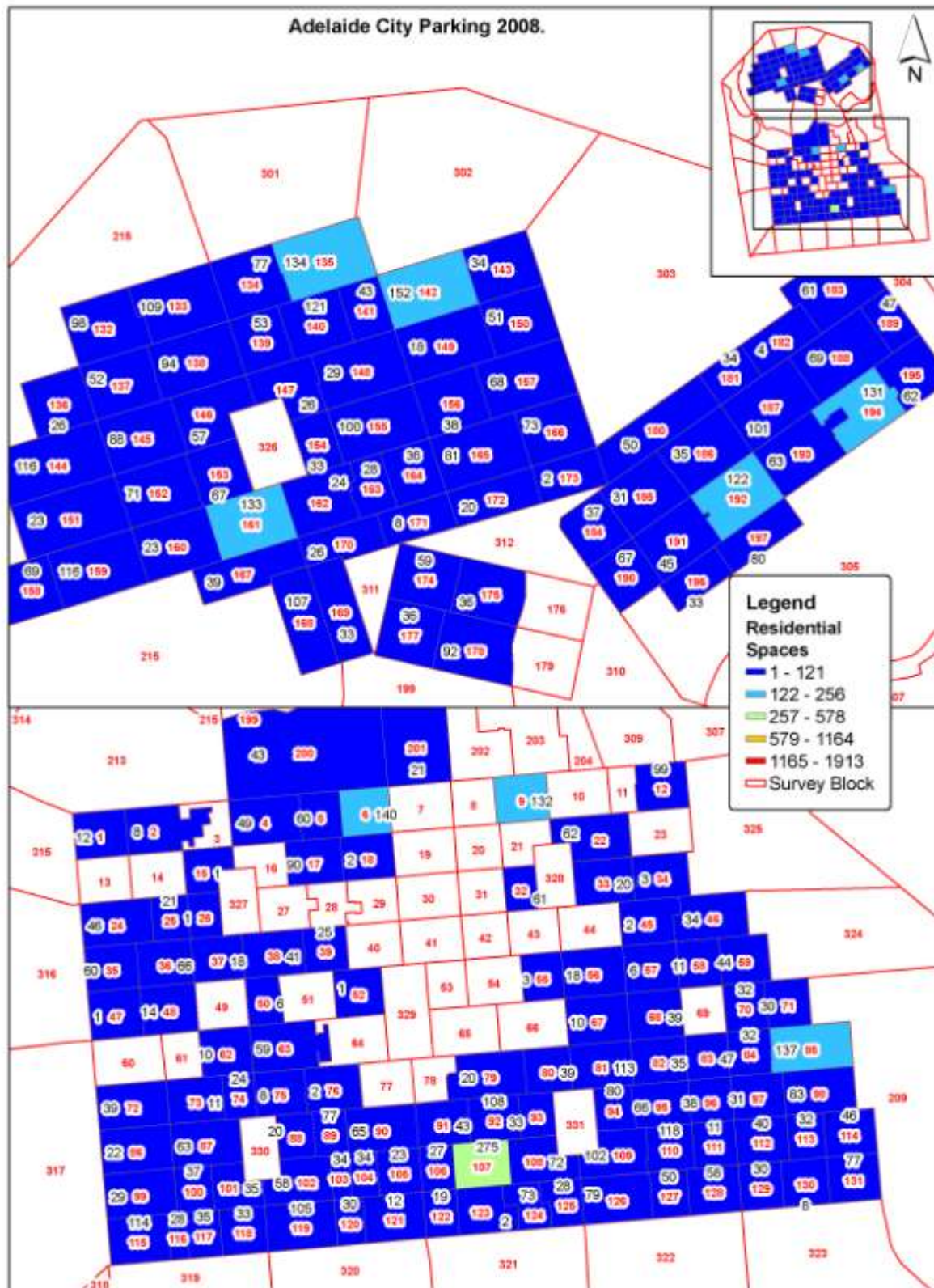


NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.



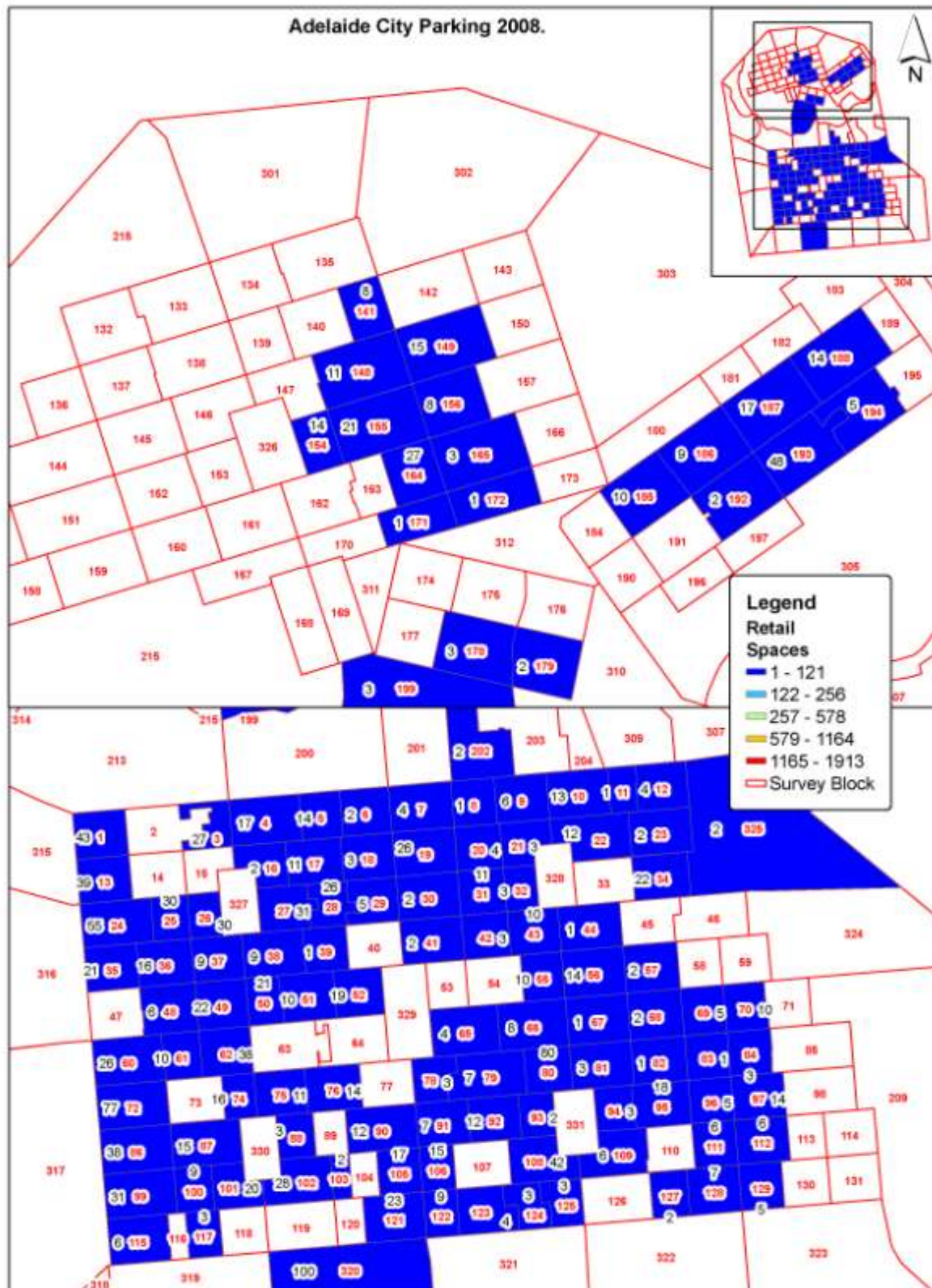
Figure 38: Total Residential Car Parking spaces, 2008.



NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.

Figure 39: Total Retail Car Parking spaces, 2008.

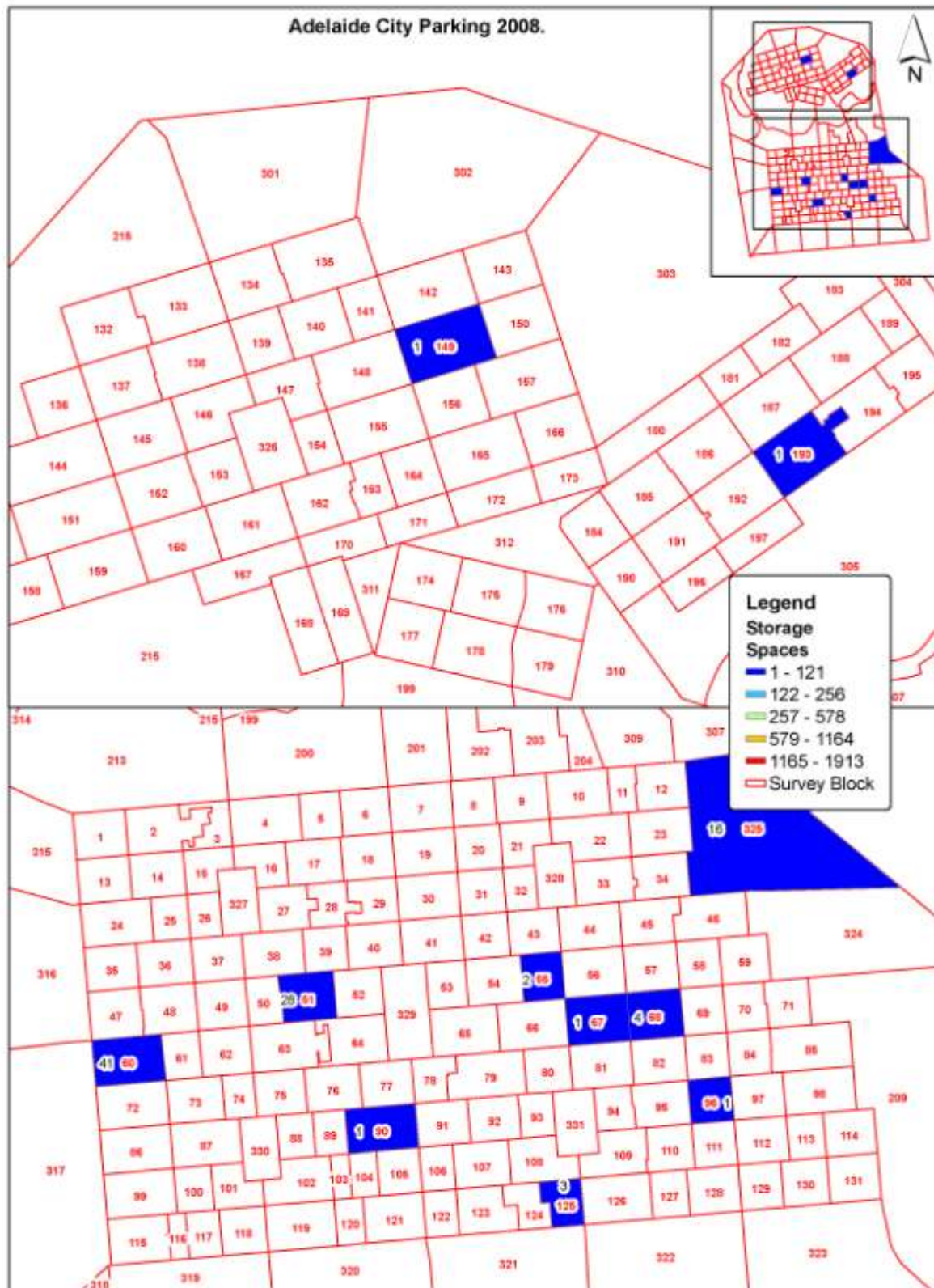


NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.



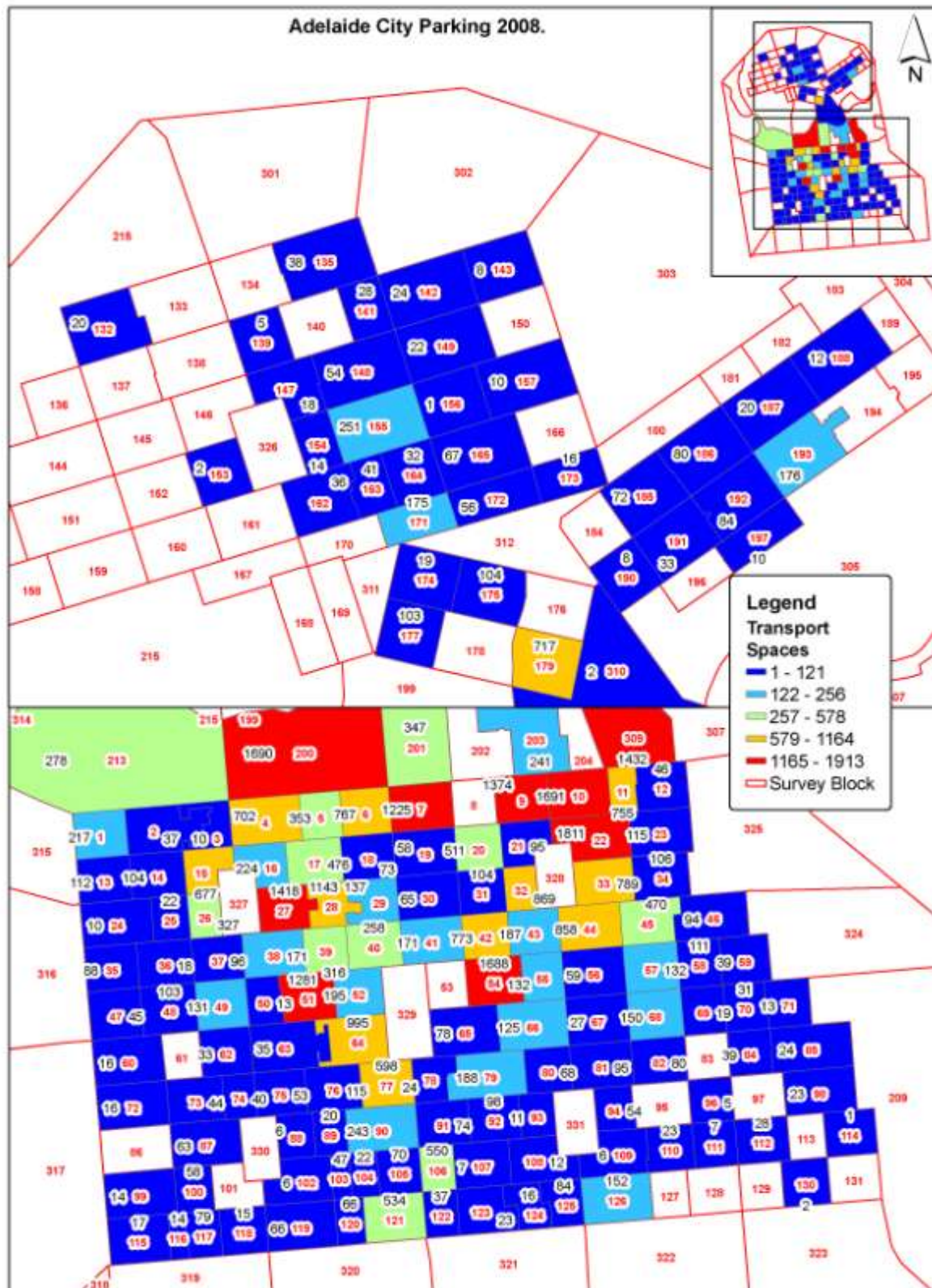
Figure 40: Total Storage Car spaces, 2008.



NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.

Figure 41: Total Transport Places Car Parking spaces, 2008.

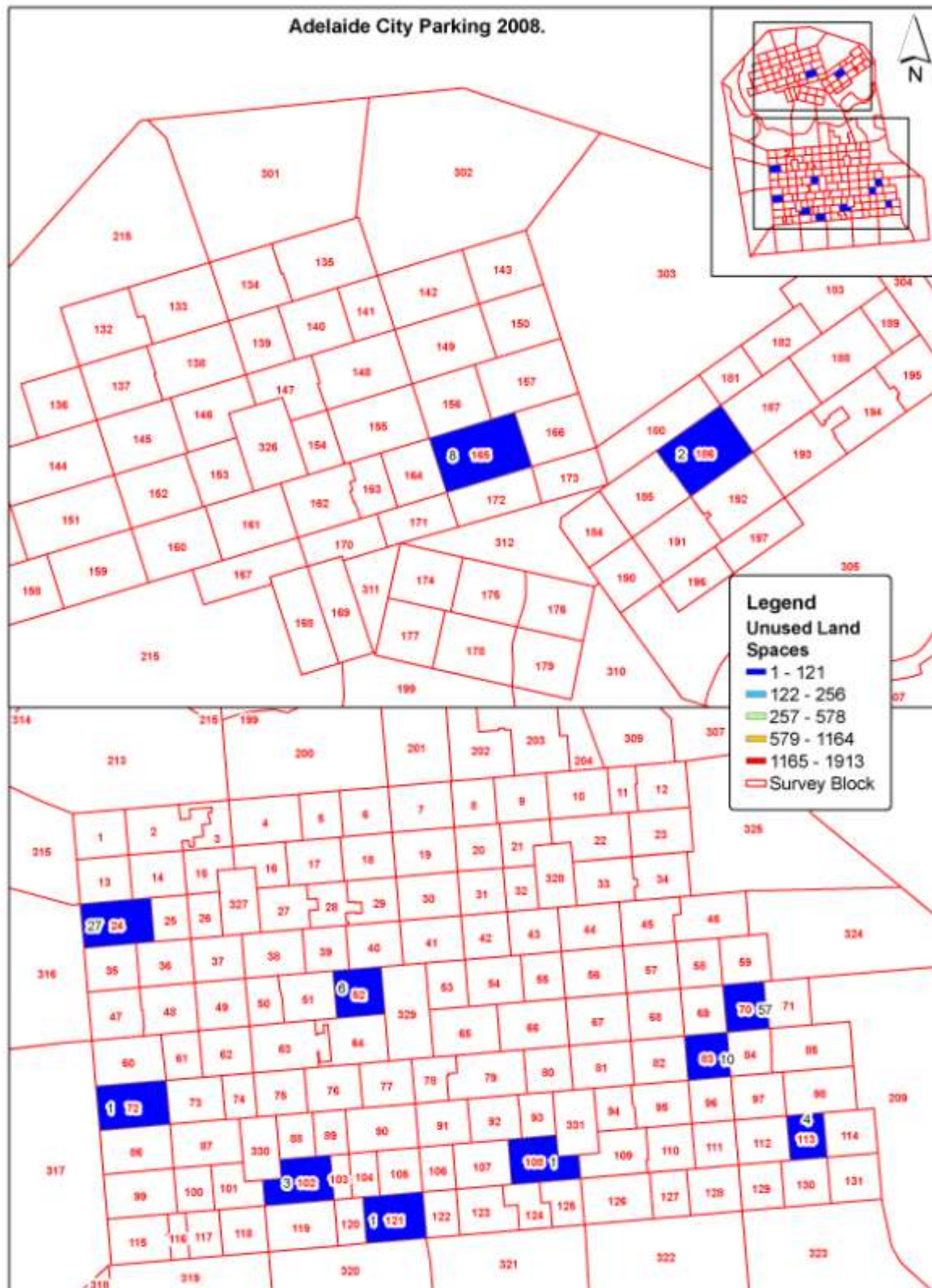


NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.



Figure 42: Total Unused Land Car Parking spaces, 2008.

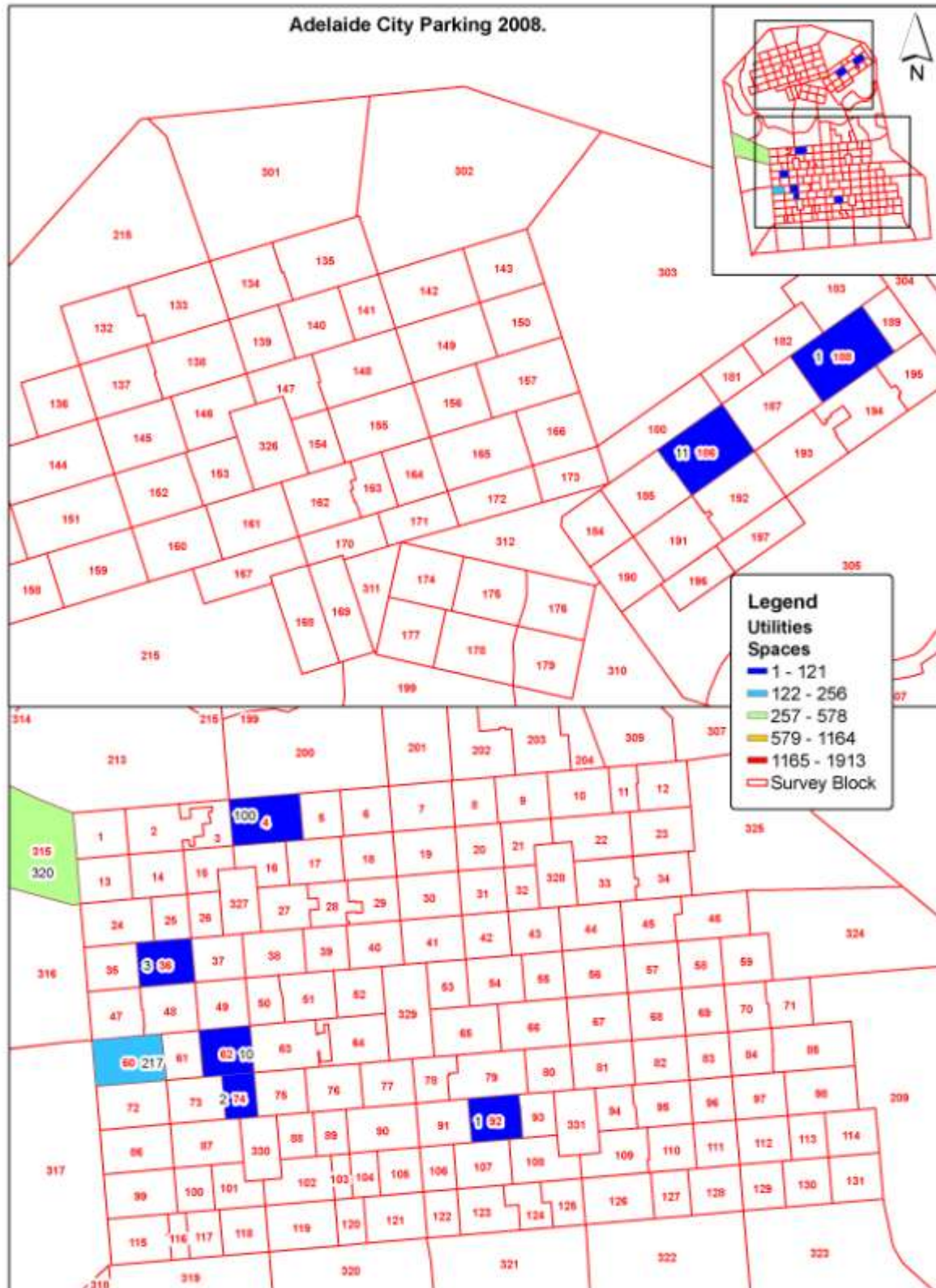


NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.



Figure 43: Total Utilities Car Parking spaces, 2008.



NB: Spaces are allocated to a broad land use - in cases with mixed land uses the allocation is based on the larger (area) land use.

Source: Adelaide City Council, Land Use and Employment Census 2008.



Alternatively, parking can be split into commercial, residential and other, these data are presented in Table 11. On this basis, commercial and residential car parking spaces have increased while other non-residential spaces declined.

**Table 11: Adelaide City Car Parking, 2006-2008.**

| Group                 | 2006  | 2008  |
|-----------------------|-------|-------|
| Commercial Parking    | 27142 | 28441 |
| Residential           | 7872  | 8282  |
| Other Non-Residential | 18966 | 18436 |
| Total                 | 53980 | 55159 |

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

## DEMOLITION AND UNDER CONSTRUCTION

- The number of sites\buildings or tenancies being demolished or under construction increased by 100 over the 2006-08 period.
- Unused land was the major land use group (37% combined) but retail (16%) and storage (16%) were also significant (Table 12).
- The distribution of demolitions or under construction sites\building\tenancies does not suggest a significant spatial pattern, but rather activity was spread widely across the Adelaide local government area (Figure 45 and 46).

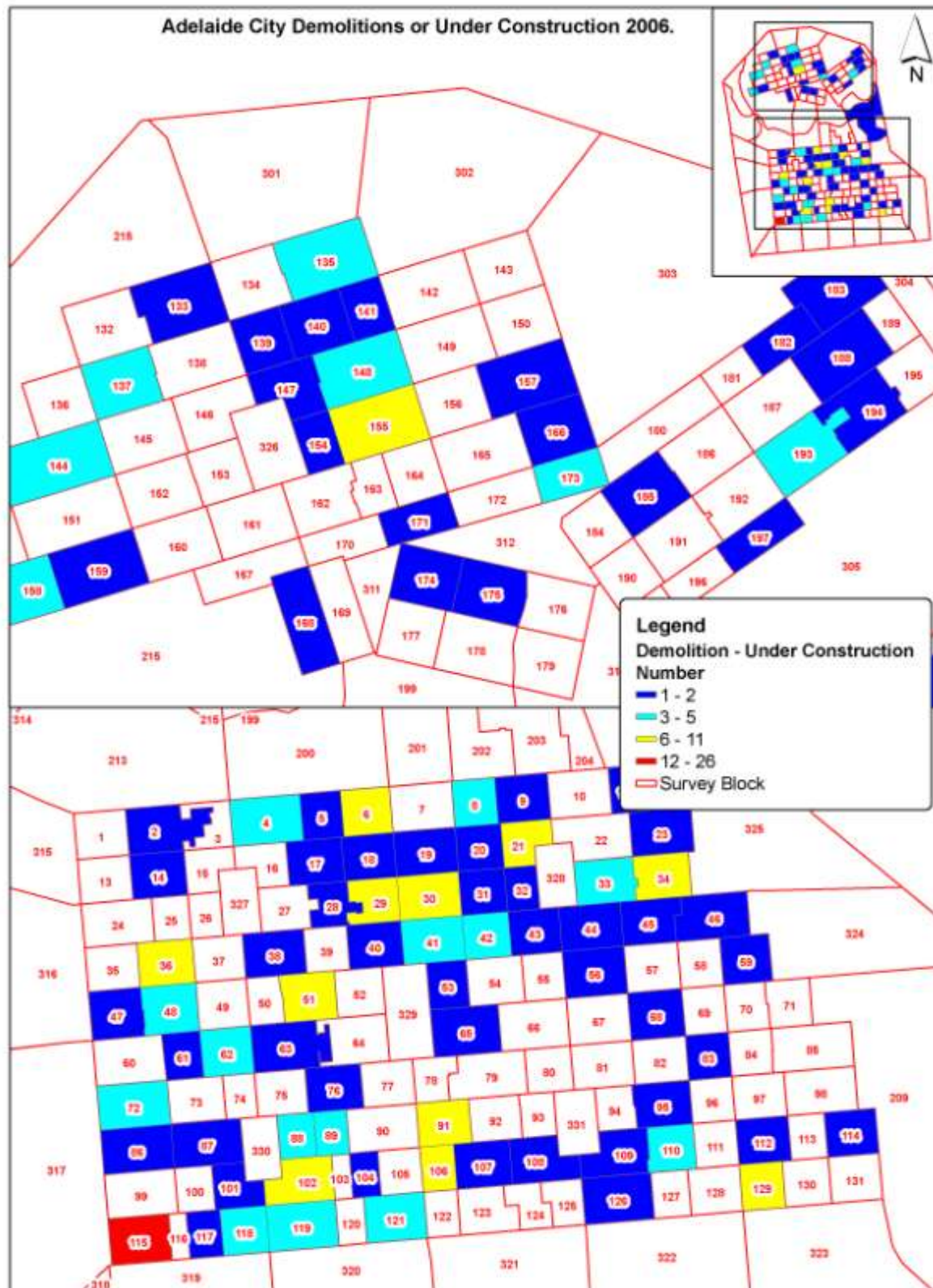
**Table 12: Adelaide City Demolition and/or Under Construction, 2006-2008.**

| Land Use                          | 2006 |       | 2008 |       |
|-----------------------------------|------|-------|------|-------|
|                                   | No   | %     | No   | %     |
| Education and Research Places     | 1    | 0.4   | 3    | 0.8   |
| Leisure and Recreation            | 9    | 3.2   | 11   | 2.9   |
| Offices                           | 91   | 32.9  | 1    | 0.3   |
| Unknown Land Use                  | 13   | 4.7   | 49   | 13.1  |
| Unused Land                       | 2    | 0.7   | 109  | 29.1  |
| Residences                        | 55   | 19.9  | 7    | 1.9   |
| Retail Distribution and Servicing | 29   | 10.5  | 61   | 16.3  |
| Storage                           | 3    | 1.1   | 61   | 16.3  |
| Transport Tracks and Places       | 3    | 1.1   | 3    | 0.8   |
| Unused Land and Property          | 70   | 25.3  | 69   | 18.4  |
| Utility Services                  | 1    | 0.4   | 1    | 0.3   |
| Total                             | 277  | 100.0 | 375  | 100.0 |

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.



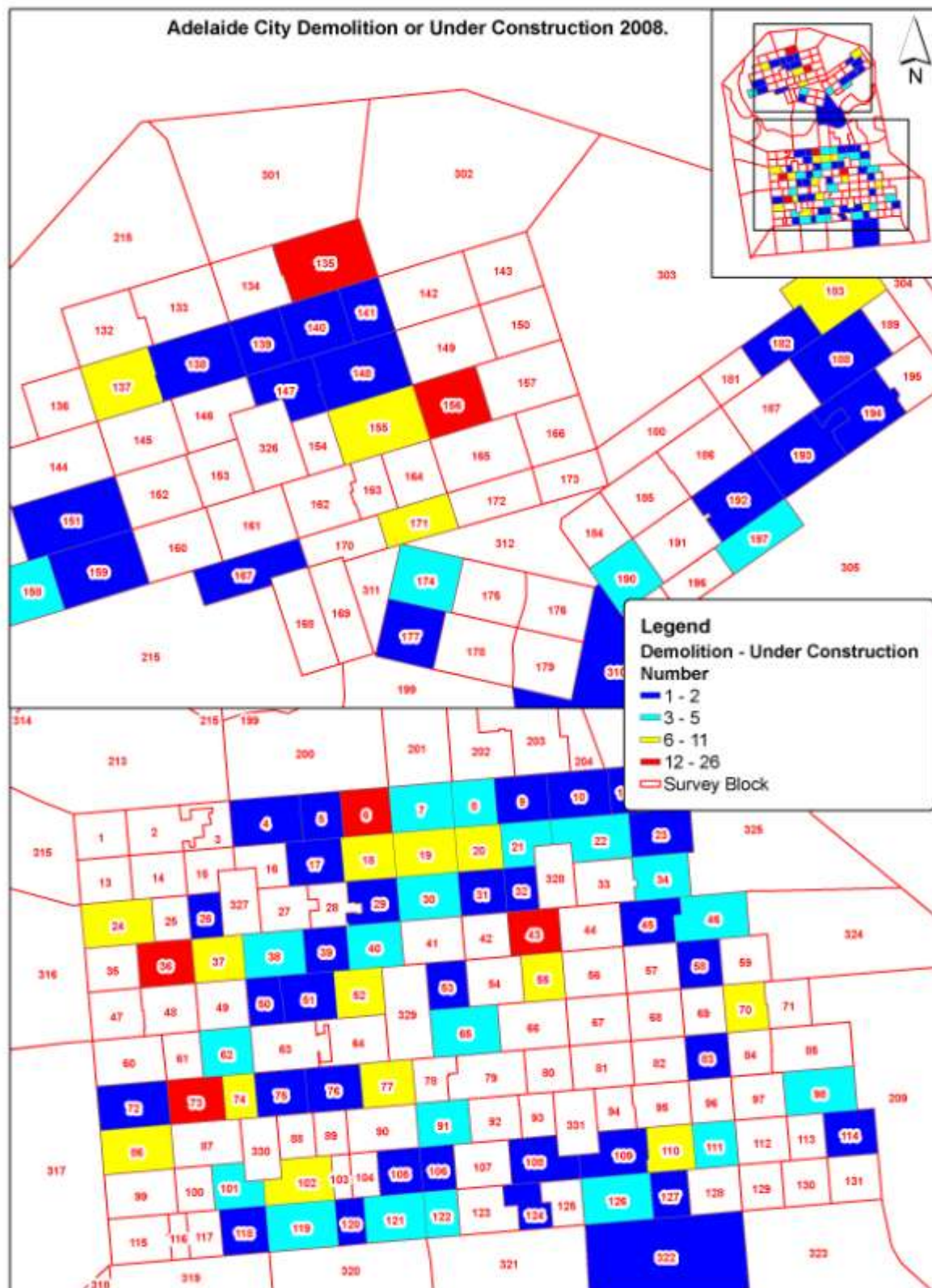
Figure 45: Adelaide City Demolition and/or Under Construction, 2006.



Source: Adelaide City Council, Land Use and Employment Census 2008.



Figure 46: Adelaide City Demolition and/or Under Construction, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008.

## VACANCY

- Vacancy declined over the 2006 to 2008 period, especially office and retail (Table 13)
- The major activity groups in 2008 were office (630 or 65%) and retail (160 or 17%).
- Overall, vacancies declined (2006-08) by 277 or 22%.
- Retail declined (2006-08) by 95 or 37%.
- Office declined (2006-08) by 110 or 15%.

Spatially, vacancy levels were higher in the major retail and office areas of the City (Figures 47 and 48), including:

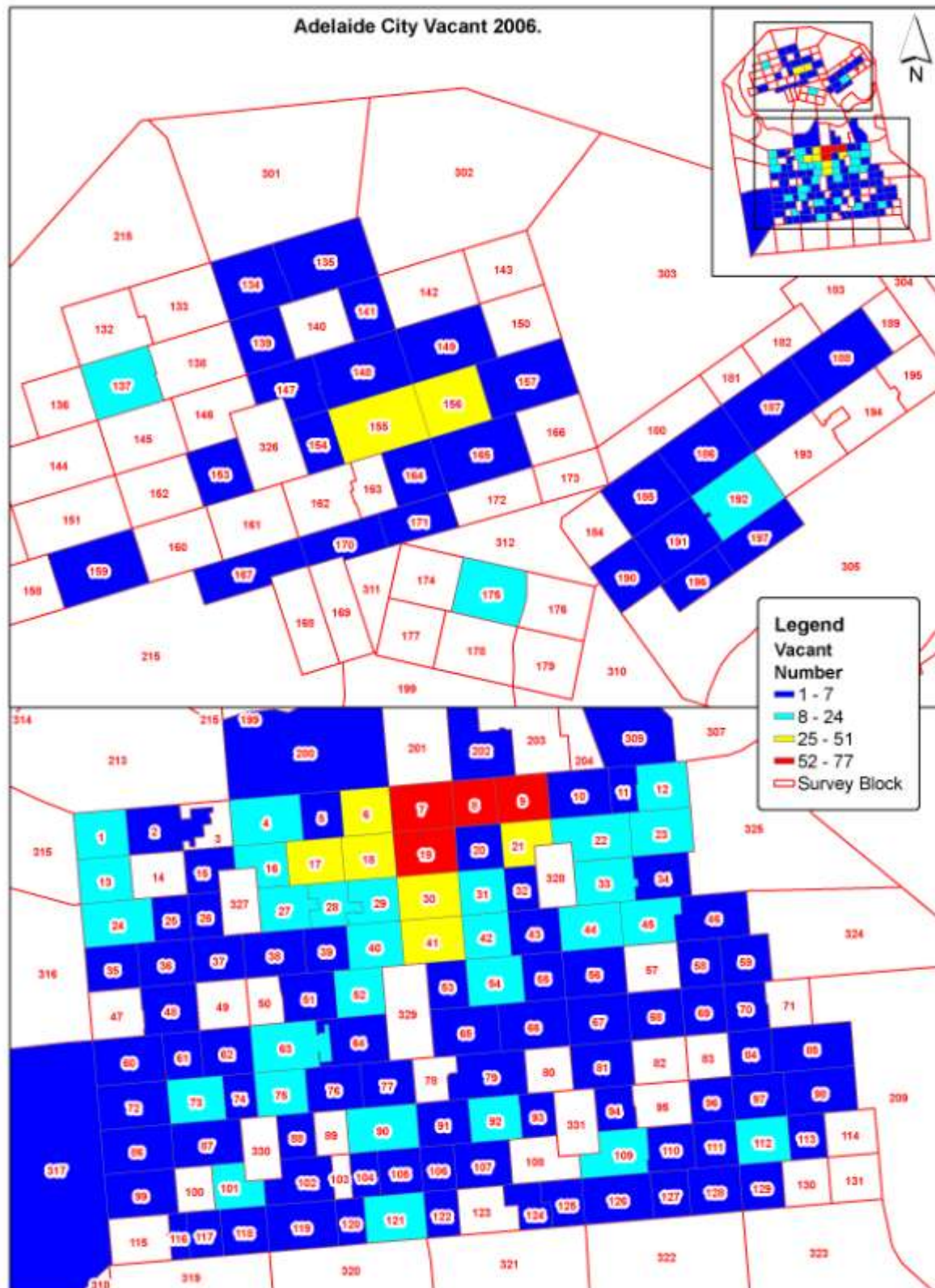
- Rundle Mall (blocks 7,8,19 and 20).
- King William Street (blocks 6,7,18, 19, 29 and 30).
- Hindley Street (blocks 4, 5,6,17 and 18).
- Hutt Street (blocks 84, 97,112 and 129).
- Melbourne Street (blocks 185, 186, 187, 188, 192 and 194).
- O'Connell Street (blocks 148, 149, 155, 156, 164, 165, 171 and 172).

**Table 13: Adelaide City Vacant, 2006-2008.**

| Land Use                          | 2006 |       | 2008 |       |
|-----------------------------------|------|-------|------|-------|
|                                   | No   | %     | No   | %     |
| Community and Health Services     | 6    | 0.5   | 7    | 0.7   |
| Education and Research Places     | 3    | 0.2   | 17   | 1.8   |
| Land (formerly Non-Residential)   | 66   | 5.3   | 19   | 2.0   |
| Land (formerly Residential)       | 38   | 3.1   | 13   | 1.3   |
| Leisure and Recreation            | 35   | 2.8   | 27   | 2.8   |
| Manufacturing                     | 17   | 1.4   | 1    | 0.1   |
| Offices                           | 740  | 59.6  | 630  | 65.4  |
| Unknown                           | 11   | 0.9   | 49   | 5.1   |
| Residences                        | 18   | 1.5   | 8    | 0.8   |
| Retail Distribution and Servicing | 255  | 20.5  | 160  | 16.6  |
| Storage                           | 49   | 3.9   | 31   | 3.2   |
| Wholesale Distribution            | 3    | 0.2   | 2    | 0.2   |
| Total                             | 1241 | 100.0 | 964  | 100.0 |

Source: Adelaide City Council; Adelaide City Census of Land Use and Employment (ACCLUE08), 2009.

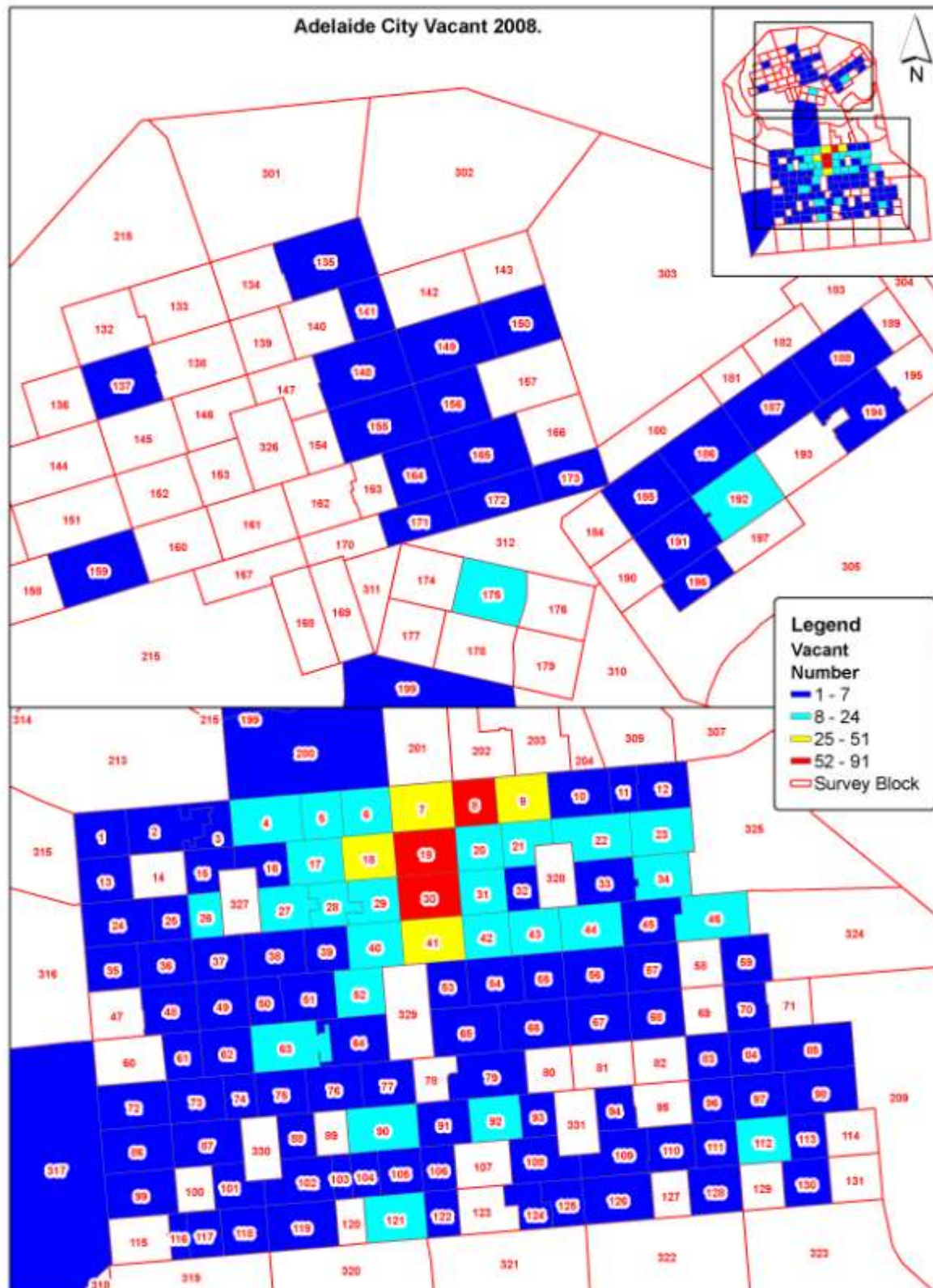
Figure 47: Adelaide City Vacancy, 2006.



Source: Adelaide City Council, Land Use and Employment Census 2008.



Figure 48: Adelaide City Vacancy, 2008.



Source: Adelaide City Council, Land Use and Employment Census 2008.



## **CITY BUSINESSES ATTITUDES**

### **Background and Methodology**

In order to support the development of the strategies to achieve business and workforce growth, information is required on current City-based organisations and on those who invest in, or manage, commercial property in the City of Adelaide environs (including North Adelaide). To gain this information the Adelaide City Council conducts both the Adelaide Census of Land Use and Employment (ACCLUE) and an additional profiling study.

The first, comprehensive, business profiling study was conducted in 2003. This was repeated annually until 2006, when it was decided the study would be conducted biennially.

Up until 2008, the information for the profiling study was gathered via telephone interviews with among current businesses (i.e. those within the City / North Adelaide precinct).

In 2008, it was suggested that the profiling information be collected via a self-completion methodology with ACCLUE interviewers being utilised for delivering the questionnaires. This self-completion methodology was felt to offer significant cost savings and a broader reach across all City businesses than the telephone methodology which was becoming increasingly skewed due to the telephone directory not being updated. Questionnaires were delivered to current businesses during the ACCLUE fieldwork process, returned via reply paid envelope and entered into the Survey System software in-house.

The self-completion methodology was undertaken in parallel to the biannual Business Segmentation telephone survey to assess the validity of both methods. Analysis was undertaken to determine whether the self-completion methodology is representative of the City business population and is, therefore, an adequate replacement of the telephone methodology as used in the Business Segmentation studies. This analysis indicated that the pilot phase of the self-completion methodology was successful in collecting a reasonably representative sample. When compared to the telephone methodology, the self-completion methodology was more representative and will be repeated during future waves of ACCLUE fieldwork.

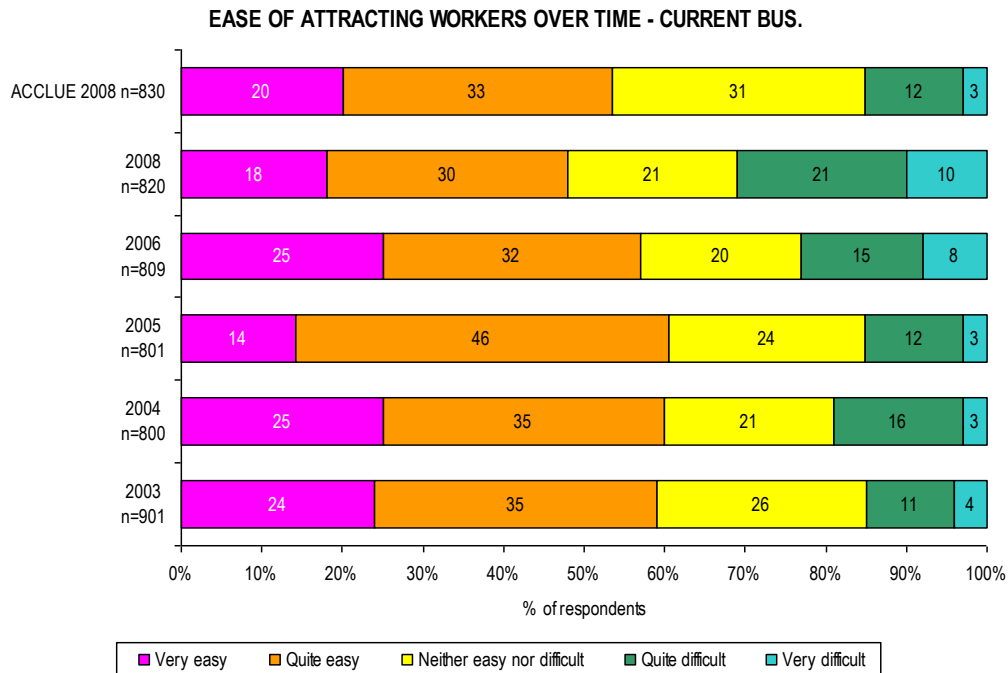
### **Results**

The information collected via the self-completion questionnaire is used to supplement ACCLUE findings. While ACCLUE focuses on the profile of businesses (including structural and land use aspects as well as employment and growth prospects) the self-completion methodology focuses on business attitudes.

### Attracting workers to the business

Just over half (53%) of all business reported that it was easy to attract workers (20% very easy and 33% quite easy).

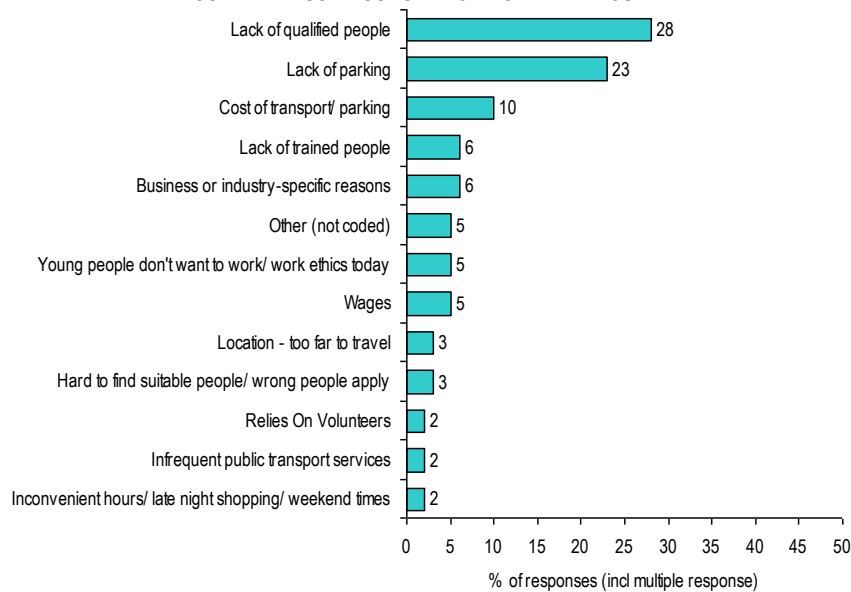
However, over 2 in 5 (43%) businesses surveyed thought it was difficult (12% of whom said it was very difficult). Results have been inconsistent time reflecting the changing nature of the skills requirements of businesses.



The main reasons reported for the difficulty in attracting workers to their business (among those businesses who said it was difficult, were:

- lack of qualified people (28%)
- lack of parking for employees (23%)

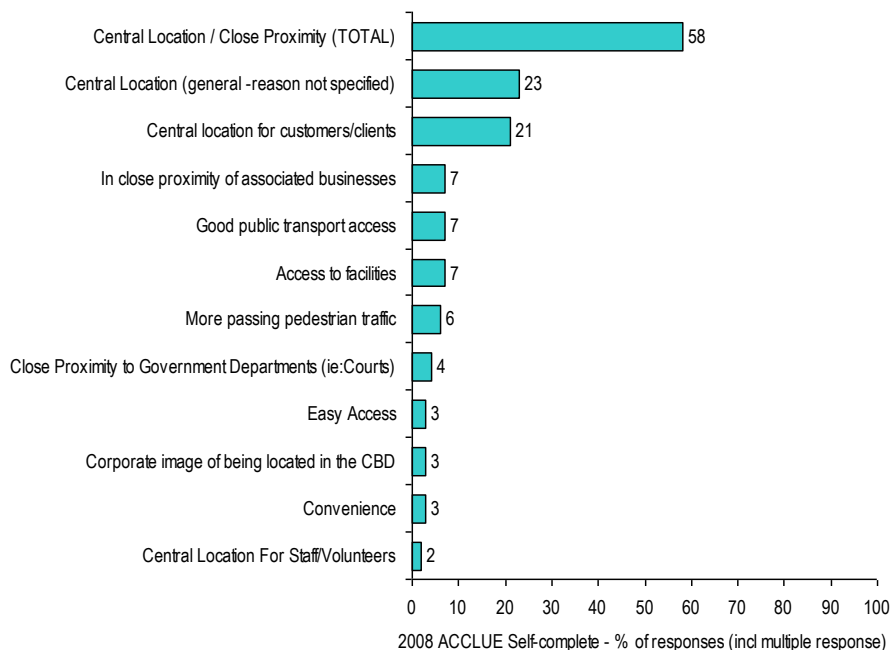
**MAIN REASONS FOR DIFFICULTY ATTRACTING WORKERS OVER TIME -  
CURRENT BUSINESSES WHICH NOTED DIFFICULTY**



**Perceptions of City location: Advantages**

By far the largest perceived advantage of being located in the City was the central location (58% said central location or close proximity). Central location for customers / clients was considered the largest specific advantage (21%). Other advantages mentioned included 'close proximity of associated businesses' (7%), 'good public transport access' (7%) and 'access to facilities' (7%).

**MAIN ADVANTAGES OF DOING BUSINESS IN THE CITY OVER TIME  
- CURRENT BUSINESSES**





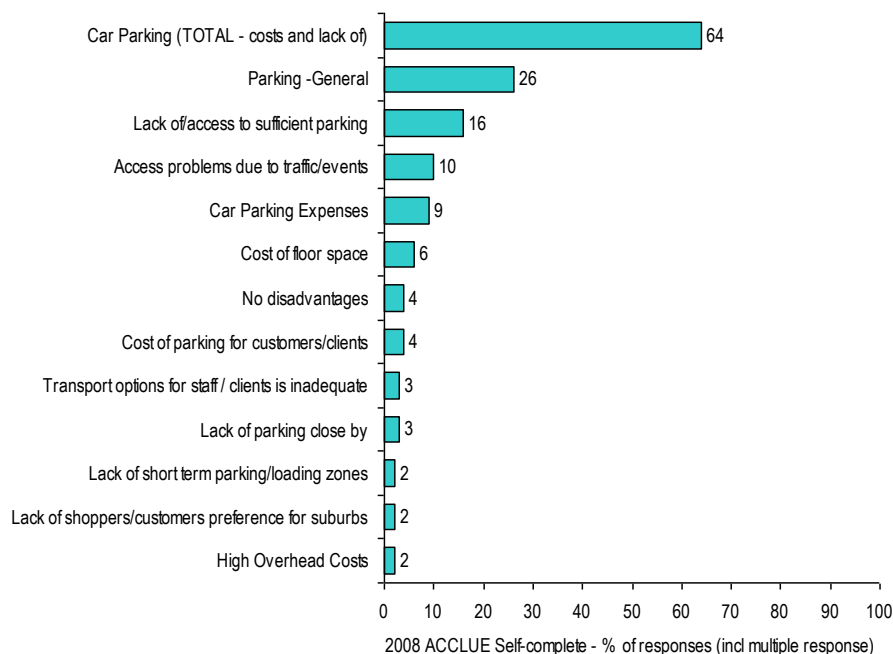
## Perceptions of City location: Disadvantages

Parking issues are clearly the most prevalent perceived disadvantage of doing business in the City. Approximately 64% cited the lack of parking nearby and/or access to parking as a disadvantage of doing business in the City.

Further issues with doing business in the City were:

- Lack of, or access to, sufficient parking – 16%,
- Access problems due to traffic / events – 10%
- Car parking expenses – 9%
- Cost of floor space 6%

**MAIN DISADVANTAGES OF DOING BUSINESS IN THE CITY OVER TIME  
- CURRENT BUSINESSES**



## Business environment factors

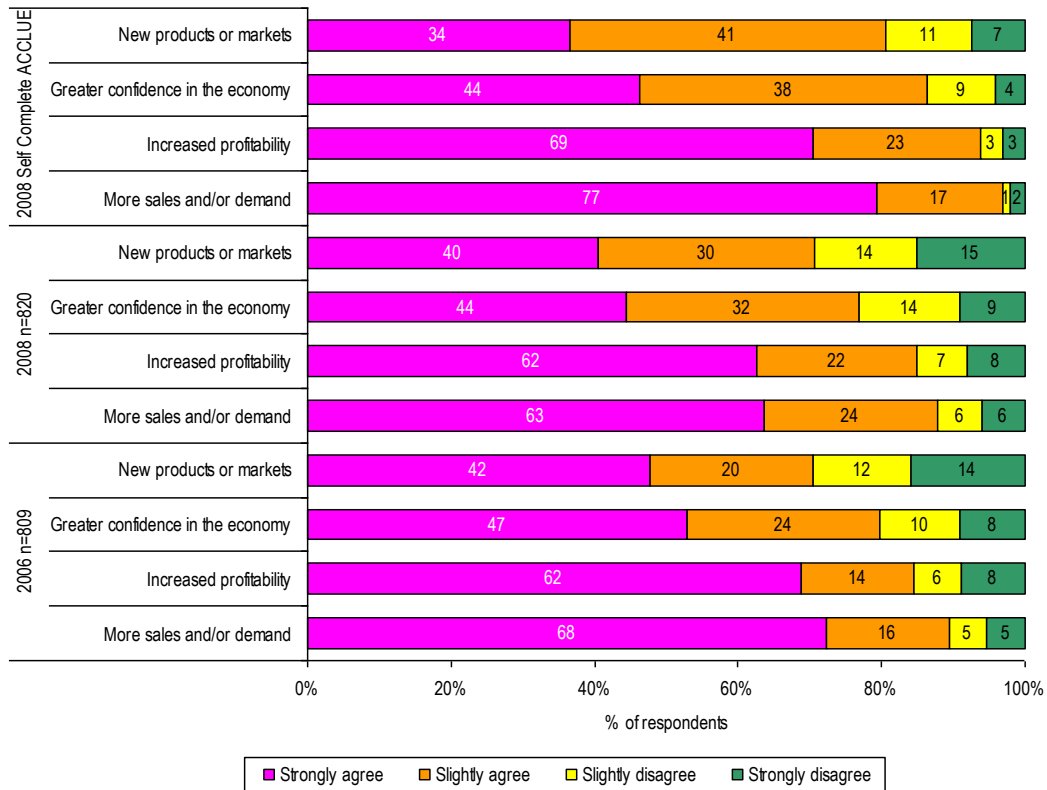
### Factors affecting investment in the business

Respondents were asked to rate their agreement or disagreement with factors that could be seen as critical in making the decision to invest more in their business.

The factors considered critical by the highest proportion of businesses are:

- More sales and/or demand (94% agree - 77% strongly agree and 17% slightly agree).
- Increased profitability (92% agree - 69% strongly agree and 23% slightly agree).

**CRITICAL FACTORS IN DECISION TO INVEST IN THE BUSINESS  
- CURRENT BUSINESSES**

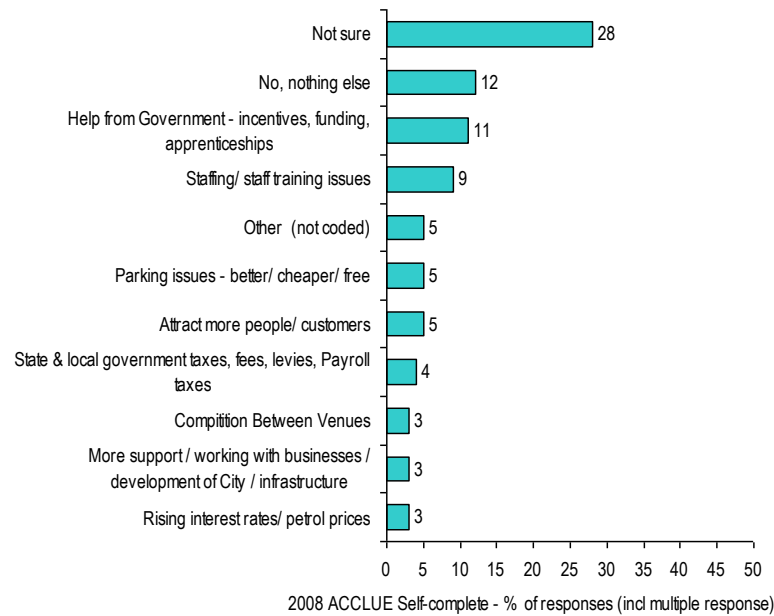


**Other factors critical to investing further in the business**

Businesses were asked what 'other factors' were critical to investing further in the business. Factors considered critical included:

- Help from Government – 11%
- Staffing / staff training issues – 9%
- Parking issues – better / cheaper / free - 5%

**OTHER FACTORS CRITICAL TO INVESTING FURTHER IN BUSINESS  
- CURRENT BUSINESSES**

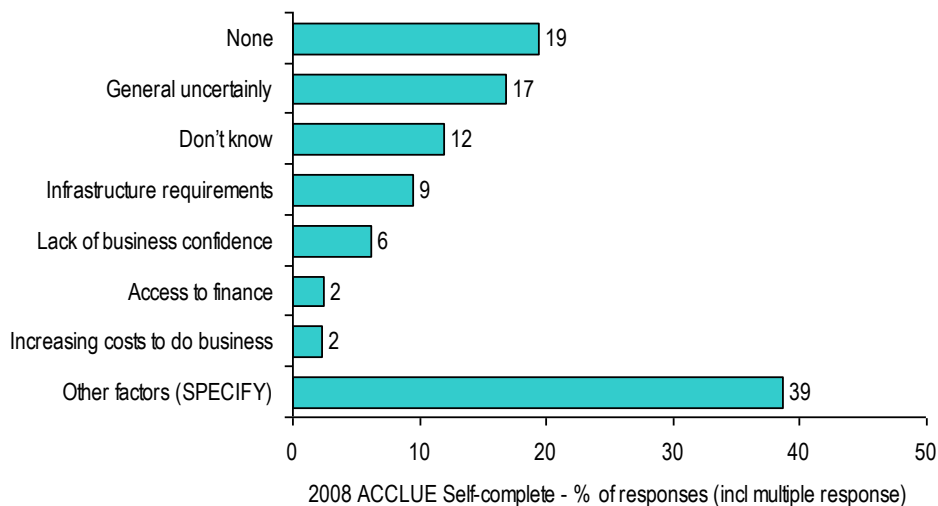


**Business environment factors**

Businesses were asked what they perceived were the current issues for the business environment as a whole, which may affect business growth.

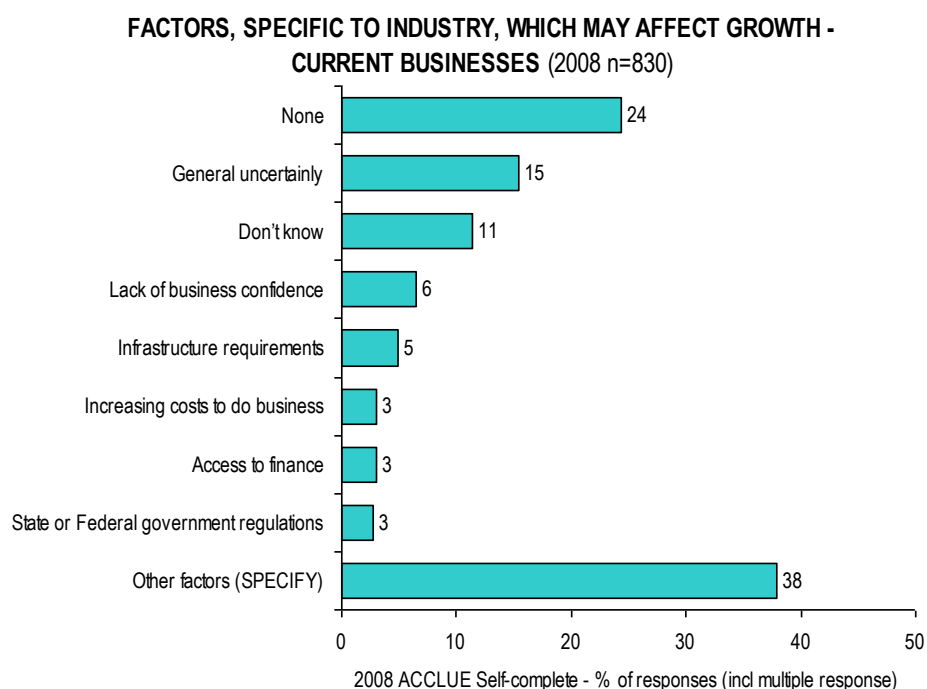
The most prominent factor mentioned focused on general uncertainty (17%).

**FACTORS, FOR BUSINESS ENVIRONMENT AS WHOLE, WHICH MAY  
AFFECT GROWTH - CURRENT BUSINESSES**



### Industry specific factors

Businesses were also asked if there were current issues specific to their industry which may affect business growth. An almost identical pattern emerged, with general uncertainty being the foremost issues (15%).



### Extent of impact on business growth

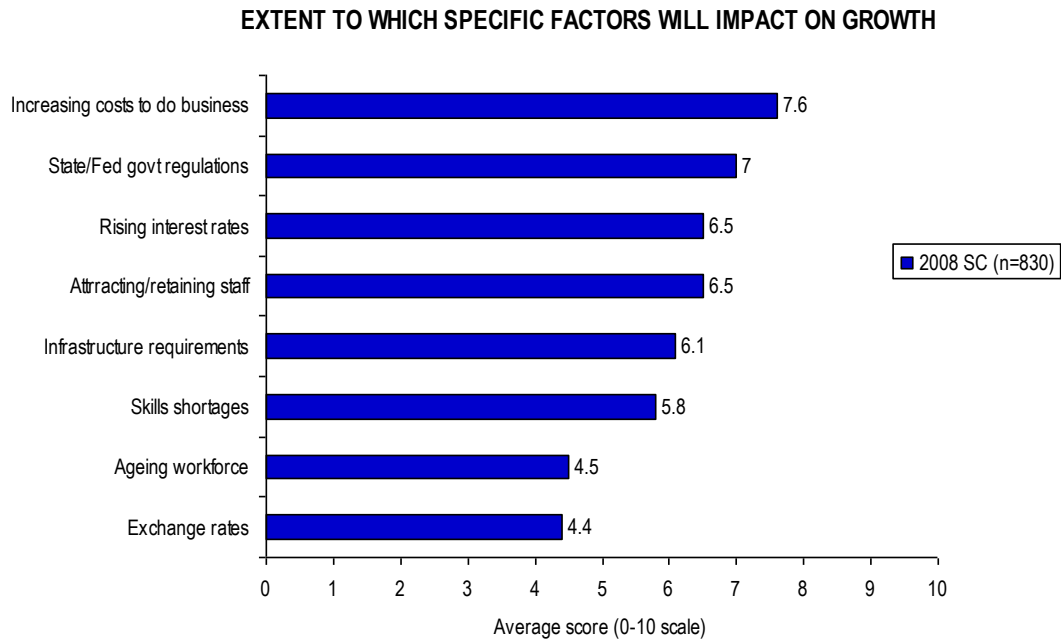
In order to measure perceptions of the impact of specific factors on business growth, businesses were asked to determine what extent they thought a range of issues would have on business growth. The issues were those already tested spontaneously in the previous series of questions. A 0 to 10 scale was used, with 0 being no impact at all and 10 being very high impact).

The main focus at the total sample level was on financial considerations, with the increasing costs to do business and rising interest rates being pre-eminent in terms of impact (7.6 and 6.5 mean score respectively) along with Government regulations (7.0).

The two issues which rated lowest were the ageing of the workforce (rated at 4.5 mean) and exchange rates (rated at 4.4 mean).

Differences





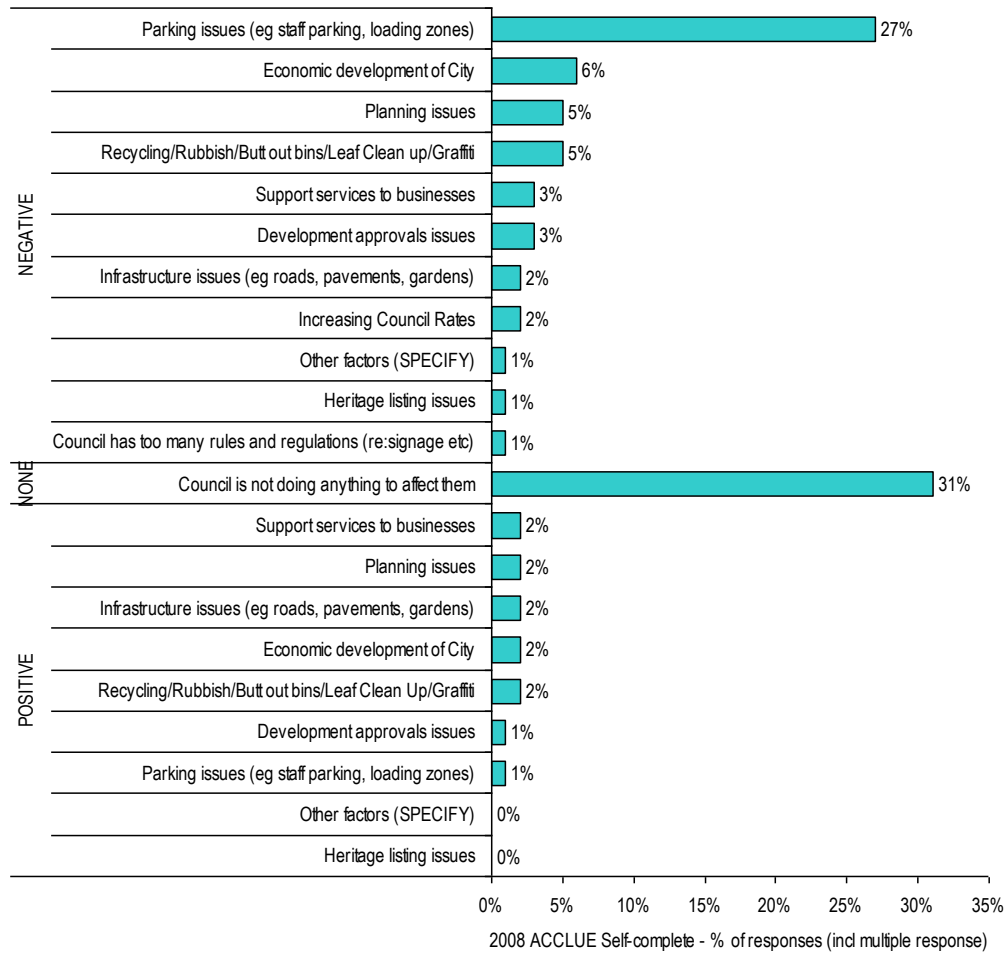
### Impacts of Council on the business

Businesses were also asked if there is anything that Council is currently doing that is affecting their business, either positively or negatively. As often occurs in research, the responses reflect an emphasis on negative aspects.

Almost a third (31%) of all businesses perceived that there is nothing that Council is doing that is affecting the business.

The most prominent issue raised was aspects surrounding parking (27%).

**ANYTHING COUNCIL IS DOING THAT IS AFFECTING BUSINESS, EITHER POSITIVELY  
OR NEGATIVELY**



# Adelaide City Census of Land Use and Employment Report, 2008

## APPENDIX A: QUESTIONNAIRE

|  |  |  |  |  |  |   |  |        |  |
|--|--|--|--|--|--|---|--|--------|--|
| <b>Adelaide City Census of Land Use and Employment</b> |  |  |  |  |  |   |  |        |  |
| COMPANY ADDRESS  |  |  |  |  |  |   |  |        |  |
| COMPANY NAME   |  |  |  |  |  |   |  | PHONE: |  |
| CONTACT NAME   |  |  |  |  |  | CONTACT POSITION                            |  |        |  |
| Response (Full/Part/Refusal)                           |  | Wheelchair Access Code<br>0=none 1= main entrance 2 = other entrance |  |  |  | Butt Out Bins<br>0=none 1= one or more bins |  |        |  |
| UBN:   |  | Space Use Code   |  |  |  | Building Condition                          |  |        |  |

| Opening Hours to Public |    |   |   |   |   |   |   |   |   |   |    |    | Open 24/7 (Mark Y if Yes) <input type="checkbox"/> |    |    |    |    |    |    |    |    |    | Never open (Mark Y if Yes) <input type="checkbox"/> |    |  |  |  |  |  |  |  |  |
|-------------------------|----|---|---|---|---|---|---|---|---|---|----|----|--|----|----|----|----|----|----|----|----|----|---|----|--|--|--|--|--|--|--|--|
|                         | AM |   |   |   |   |   |   |   |   |   |    |    | PM   |    |    |    |    |    |    |    |    |    |   |    |  |  |  |  |  |  |  |  |
| Monday                  | 0  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12   | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22  | 23 |  |  |  |  |  |  |  |  |
| Tuesday                 | 0  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12   | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22  | 23 |  |  |  |  |  |  |  |  |
| Wednesday               | 0  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12   | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22  | 23 |  |  |  |  |  |  |  |  |
| Thursday                | 0  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12   | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22  | 23 |  |  |  |  |  |  |  |  |
| Friday                  | 0  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12   | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22  | 23 |  |  |  |  |  |  |  |  |
| Saturday                | 0  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12   | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22  | 23 |  |  |  |  |  |  |  |  |
| Sunday                  | 0  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12   | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22  | 23 |  |  |  |  |  |  |  |  |

|                                |  |                                       |  |   |  |                   |  |
|--------------------------------|--|---------------------------------------|--|---|--|-------------------|--|
| Major employer (mark Y if Yes) |  | Government (Commonwealth/State/Local) |  | Residential/Vacant/ construction/Other open space |  | Parkland/UC under |  |
|--------------------------------|--|---------------------------------------|--|---|--|-------------------|--|

# Adelaide City Census of Land Use and Employment Report, 2008

|    |  |  |
|----|--|--|
| 1  | What is the main activity conducted by this business at this address?  |  |
| 2  | How long has this business been at this address? (Double click in the appropriate box)<br><input type="checkbox"/> less than 12 months <input type="checkbox"/> 1-2 years <input type="checkbox"/> 3-5 years <input type="checkbox"/> 6-10 years <input type="checkbox"/> 11-15 years <input type="checkbox"/> 16-20 years <input type="checkbox"/> more than 20 years |  |
| 3  | Prior to this address, what was the postcode of the previous location of this business? (Record Post Code)   |  |
| 4  | Has there been any change in owners of this business since last June? (Double click in the appropriate box)  | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Don't Know      |
| 5  | Including casuals, how many full-time staff are employed by this business who work at this address? (record number)  |  |
| 6  | Including casuals, how many part-time staff are employed by this business who work at this address? (record number)  |  |
| 7  | How many full-time staff are based at this address, but work off-site? (record number)   |  |
| 8  | How many part-time staff are based at this address, but work off-site? (record number)   |  |
| 9  | How many of these off-site staff visit this address at least once per week? (record number)  |  |
| 10 | Do you plan to decrease/increase staff over the next 2 years? (record number)  |  |
| 11 | Do you plan to decrease/increase your space over the next 2 years? (record floor space or percent change)  |  |
| 12 | Do you plan to move in the next 2 years? (Double click in the appropriate box)   | <input type="checkbox"/> Y <input type="checkbox"/> N  |
| 13 | If you plan to move, will you move within <input type="checkbox"/> Adelaide <input type="checkbox"/> North Adelaide <input type="checkbox"/> elsewhere?<br>? (Double click in the appropriate box) (record location - suburb or postcode)  |  |
| 14 | Does this Business have internet access? (Double click in the appropriate box)   | <input type="checkbox"/> N <input type="checkbox"/> Dial-up <input type="checkbox"/> Broadband |
| 15 | Does this Business have WiFi? (Double click in the appropriate box)  | <input type="checkbox"/> Y <input type="checkbox"/> N  |
| 16 | If yes, can the public access your WiFi network? (Double click in the appropriate box)   | <input type="checkbox"/> Y <input type="checkbox"/> N  |
| 17 | Does this building have secure bicycle parking? (Double click in the appropriate box)  | <input type="checkbox"/> Y <input type="checkbox"/> N   Record number                          |
| 18 | Are there shower facilities in this building? (Double click in the appropriate box)  | <input type="checkbox"/> Y <input type="checkbox"/> N  |



# Adelaide City Census of Land Use and Employment Report, 2008

|    |   |  |
|----|---|--|
| 19 | <p>Do you have any parking spaces assigned to your business?</p> <p>If yes, Please indicate the number and whether they are covered or uncovered.</p> | <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <input type="checkbox"/> Y<br/>Covered         </div> <div style="text-align: center;"> <input type="checkbox"/> N<br/>Uncovered         </div> </div> |
|----|---|--|

| Venue Type             | Capacity        | Number | Venue Type                   | Capacity   | Number |
|------------------------|-----------------|--------|------------------------------|------------|--------|
| Bar/Tavern/Pub         | Persons         |        | Hostel/Backpacker            | Beds       |        |
| Cafe/Restaurant/Bistro | Seats - Indoor  |        | House                        | Dwellings  |        |
| Cafe/Restaurant/Bistro | Seats - Outdoor |        | Townhouse                    | Dwellings  |        |
| Child care centre      | Child places    |        | Institutional Accom.         | Beds       |        |
| Cinema                 | Screens         |        | Nightclub                    | Persons    |        |
| Cinema                 | Seats           |        | Parking                      | Car spaces |        |
| Commercial accom.      | Rooms           |        | Res. Apartments              | Dwellings  |        |
| Conferences/Meetings   | Seats           |        | Serviced Apartments          | Dwellings  |        |
| Food Court             | Seats - Indoor  |        | Student Accom.               | Beds       |        |
| Food Court             | Seats - Outdoor |        | Student Apartments           | Beds       |        |
| Gaming                 | Gaming machines |        | Student Apartments           | Dwellings  |        |
| Hospital/clinic        | Beds            |        | Theatre/Concert Hall/Stadium | Seats      |        |

## APPENDIX B: DEFINITIONS

### Definitions

Establishment - Comprises all contiguous space occupied by a particular tenancy.

Building - An independent structure which can comprise one or more *establishments*.

Full-time Employment - Person employed for at least 35 hours per week by that employer, including casual employees.

Part-time Employment - Person employed for at least 1 hour, but less than 35 hours, per week by that employer, including casual employees.

On-site Employment - Persons spending at least 50% of work time on site.

Off-site Employment - Persons who spend less than 50% of work time on-site.

Land Use Codes - A list of what each code contains is available from the Adelaide City Council. The codes used are the same as those used in the 1982 Land Use and Employment Survey.

### More Information

It should be noted that this report provides analysis of the basic data gathered in the study. Extensive further data analysis is possible by cross analysing questions with any other question. If any further analysis is required, please contact Corporate Planning and Performance at [researchservices@adelaidecitycouncil.com](mailto:researchservices@adelaidecitycouncil.com) or on +61 8 8203 7265.