

# Adelaide City Census of Land Use and Employment 2011

## Summary Report

HAS OUTDOOR  
DINING INCREASED?

HOW MANY VOLUNTEERS  
WORK IN THE CITY?

**HOW MANY  
PEOPLE WORK  
IN THE CITY?**

**WHICH  
INDUSTRIES  
ARE GROWING?**

HAVE TOWN HOUSES  
AND APARTMENTS  
BECOME MORE  
POPULAR?

**WHICH INDUSTRIES  
DO PEOPLE WORK IN?**

**ARE CAR  
PARKING SPACES  
INCREASING?**

WHICH INDUSTRIES  
ARE DECLINING?

HOW MANY ESTABLISHMENTS  
ARE VACANT?

**HAS THE NUMBER OF SMALL  
BUSINESSES DECLINED?**

HOW MANY SEATS ARE AVAILABLE IN THE  
CITY FOR MEETINGS AND CONFERENCES?

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# Introduction

This summary of the 2011 Adelaide City Census of Land Use and Employment (the census) provides a statistical snapshot of the City's employment, industries, land use, parking, and venue capacities.

This information is used by Adelaide City Council to help plan for its capital works, programs and services. It is also used by other organisations to supplement their research, to plan their business development, or to choose locations for community services or other activities.

The census has been collected on a regular basis since 1967, with the last census being 2008.

This census was conducted from May to July 2011 by field staff who attempted to survey every establishment (businesses and organisations) in the City.

The census was not compulsory and some businesses chose not to participate. In this case, or when contact could not be made, employment data was captured from other sources where possible, such as annual reports or previous censuses.

Adelaide City Council is grateful to the businesses and organisations that provided information for this census.

## Key 2011 Statistics

- » People employed in the City: 118,200
- » Top five employers by industry:
  - › public administration and safety (25,326 or 21%);
  - › health care and social assistance (16,039 or 14%);
  - › professional, scientific and technical services (12,647 or 11%);
  - › administrative and support services (11,725 or 10%);
  - › accommodation and food services (10,744 or 9%)
- » Declining industries:
  - › professional, scientific and technical services (-1875);
  - › financial and insurance services (-1509)
  - › retail trade (-906)
- » Large organisations employed 45% of the City's workforce
- » Small businesses represented 83% of the City's establishments
- » 11% of City businesses had been operating for less than 12 months and 17% had been operating for more than 20 years
- » City residents 2010: 19,876<sup>1</sup>
- » Dwelling types:
  - › residential apartments (4701 or 42%),
  - › townhouses (4621 or 42%),
  - › detached houses (1021 or 9%)
  - › serviced apartments (771 or 7%)
- » Venue capacity:
  - › cafes and restaurants: 58,151 seats;
  - › bars, pubs and taverns: 34,301 people;
  - › theatres, concert halls and stadiums: 26,787 seats;
  - › conference and meeting rooms: 26,330 seats
- » 24,297 commercial off-street car parks

<sup>1</sup>Australian Bureau of Statistics, 2011, Population Estimates by Local Government Area 2009-10, 3218.0.

# 2011 Results

## Employment

The total number of people employed in the City in 2011 was 118,200, roughly the same number as the 2008 employment figure of 118,490.

Some variations in the number of people employed in the City have occurred over the last few years: significant increases were recorded between 2003 and 2005 and then between 2006 and 2008 (Fig. 1).

The 2008 census was conducted just before the Global Financial Crisis. Since then, and contrary to many experiences around the world, the 2011 census indicates that the City has enjoyed stable employment.

**TOTAL EMPLOYEES  
IN THE CITY WOULD FILL**

**2951**

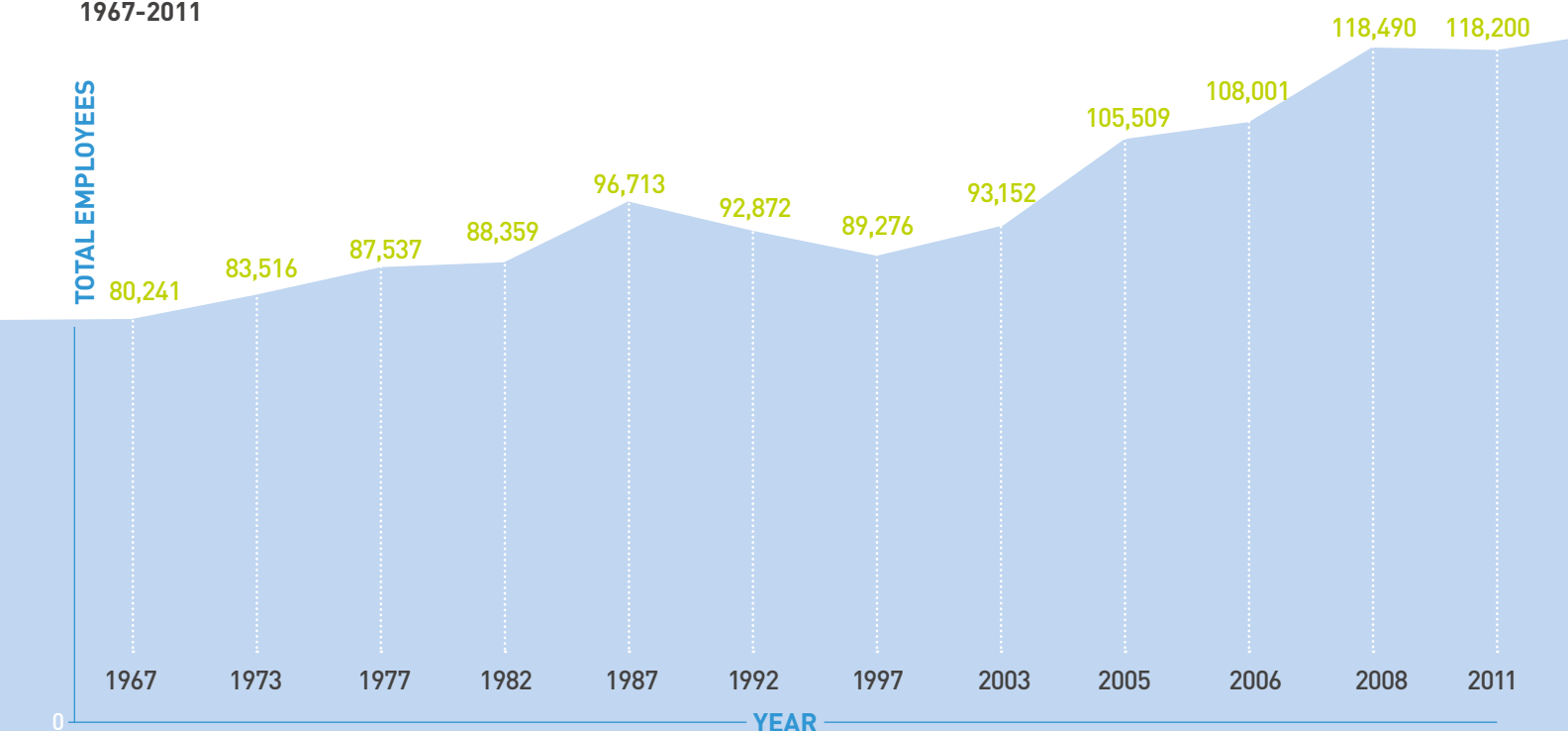
**PUBLIC TRANSPORT BUSES**



100 x

Figure 1

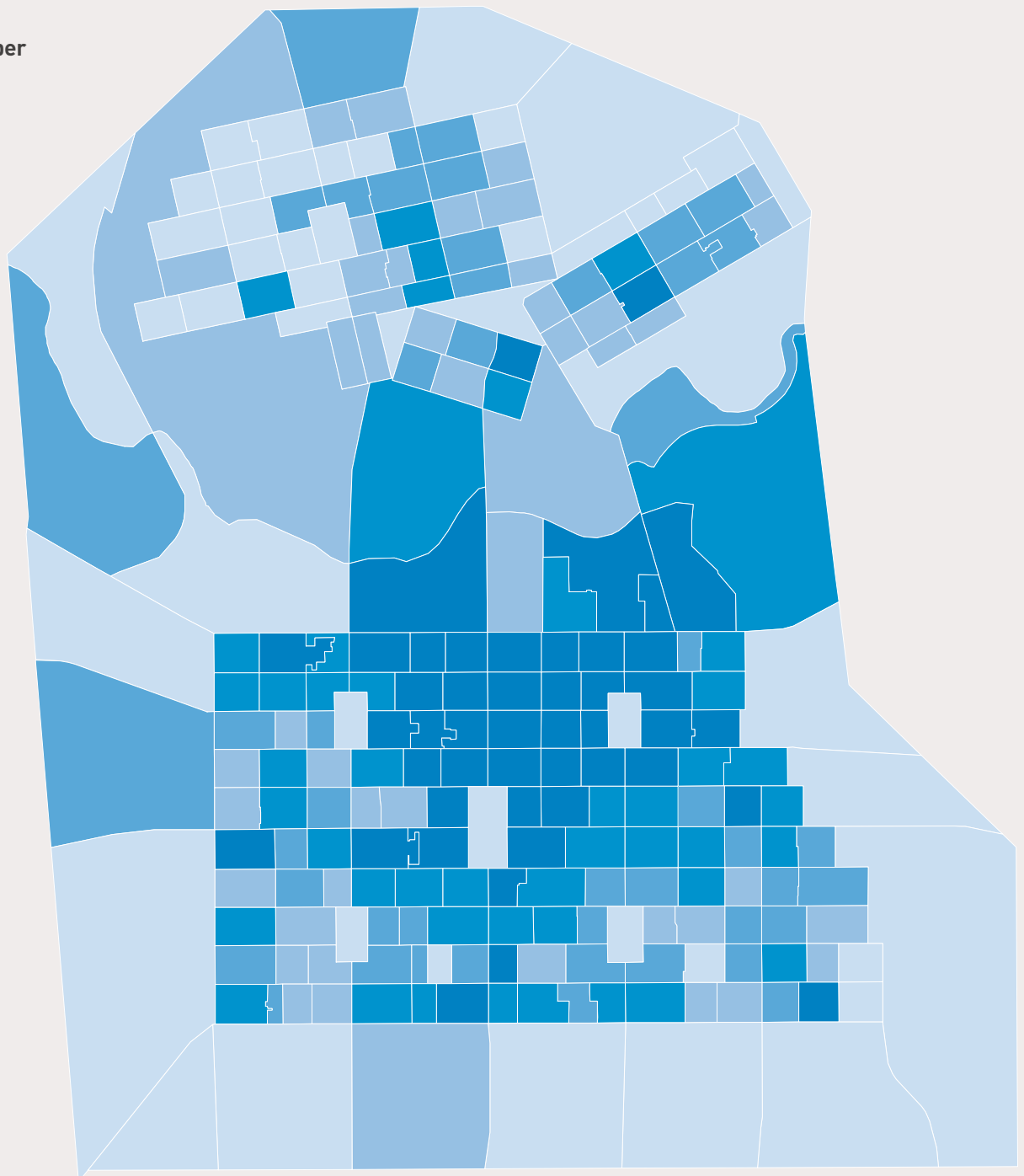
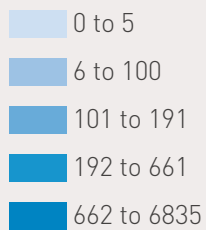
**Total employment  
(number of employees)  
1967-2011**



The greatest concentration of employment in the City in 2011 was within the Central Business District along King William Street from Victoria Square to North Terrace (Fig. 2). This is similar to the findings of the 2008 census.

**Figure 2**

**Concentration of employment (number of workers per census block) 2011**



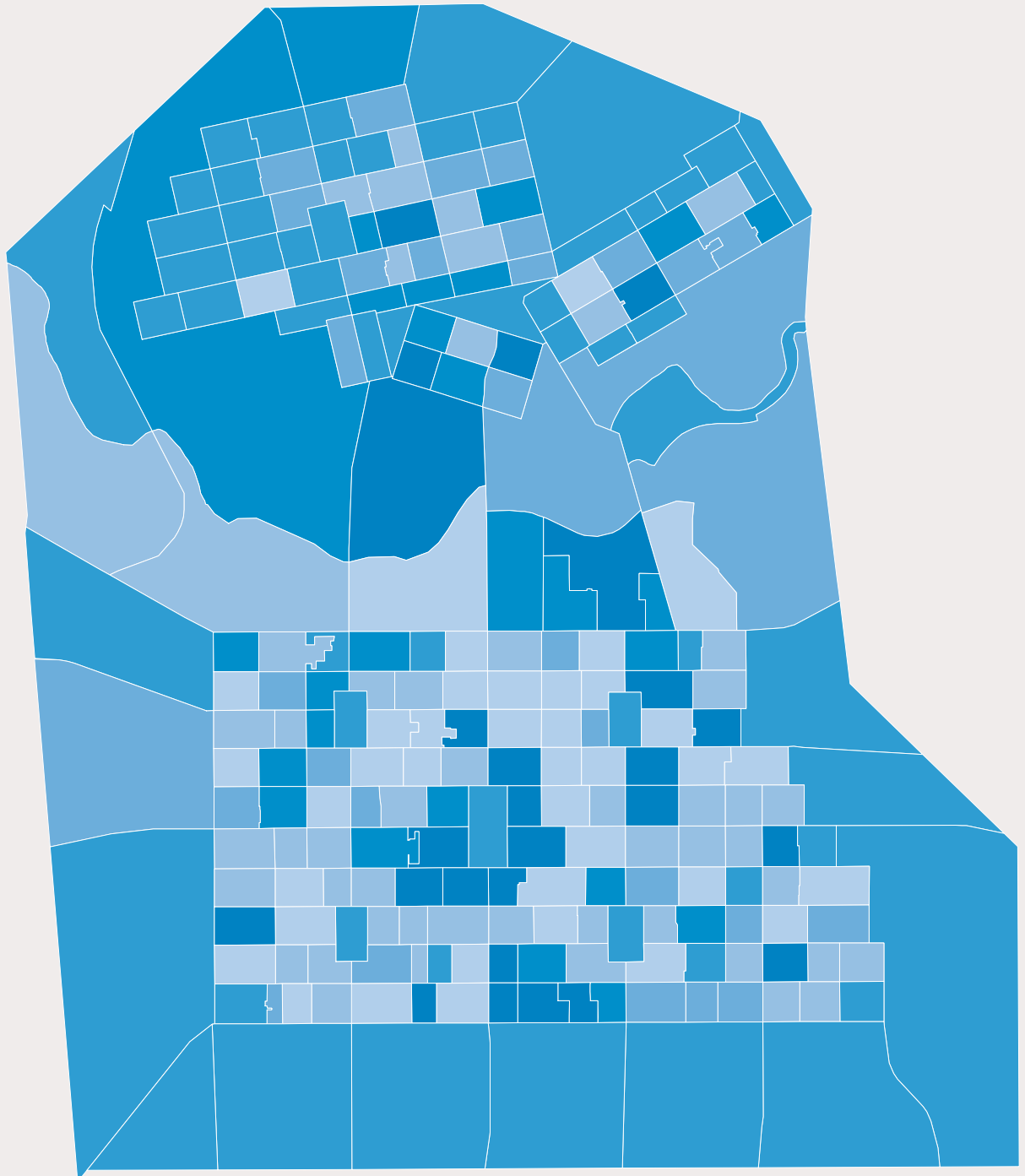
\*Large survey collection blocks were allocated in the Park Lands. This means that the areas showing employment in the Park Lands were indicative of only a few employers

However, most growth between 2008 and 2011 was experienced in areas including around Victoria Square, North Terrace university and Adelaide Oval precincts, and

along King William Street towards South Terrace (Fig. 3). In particular, the Women's and Children's Hospital in North Adelaide has experienced an increase in staff since 2008.

**Figure 3**

**Total employment change (number of employees per census block) from 2008 to 2011**



# Volunteers

In 2011, 6700 volunteers worked in the City<sup>2</sup>, mainly at the Adelaide Zoo, in the hospitals, and with community welfare and religious organisations. The contribution that

volunteers make to the City of Adelaide is significant in terms of unpaid work and the economic contribution through goods and services they purchase while in the City.

# Employment Industries

In 2011, the industries with the highest number of employees were, in order:

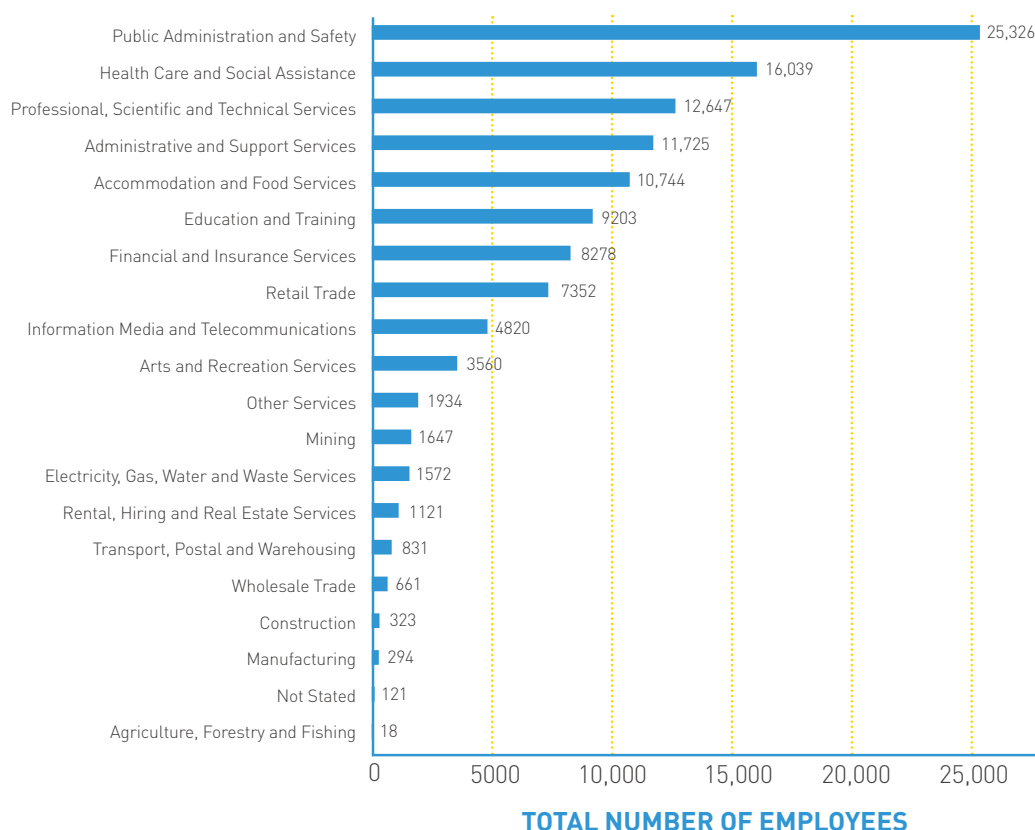
- » Public Administration and Safety (25,326 or 21%)
- » Health Care and Social Assistance (16,039 or 14%)
- » Professional, Scientific and Technical Services (12,647 or 11%)
- » Administrative and Support Services (11,725 or 10%)
- » Accommodation and Food Services (10,744 or 9%)

Together these industries accounted for 65% of the total employment in the City (Fig. 4).

'Agriculture, Forestry and Fishing', 'Manufacturing', 'Construction', 'Wholesale Trade' and 'Transport, Postal and Warehousing' were the five industries with the lowest number of employees recorded in 2011 (Fig. 4).

**Figure 4**

**Total employment (number of employees) by industry classification<sup>3</sup> 2011**



<sup>2</sup>In addition to the total employment figure

<sup>3</sup>ANZSIC Divisions

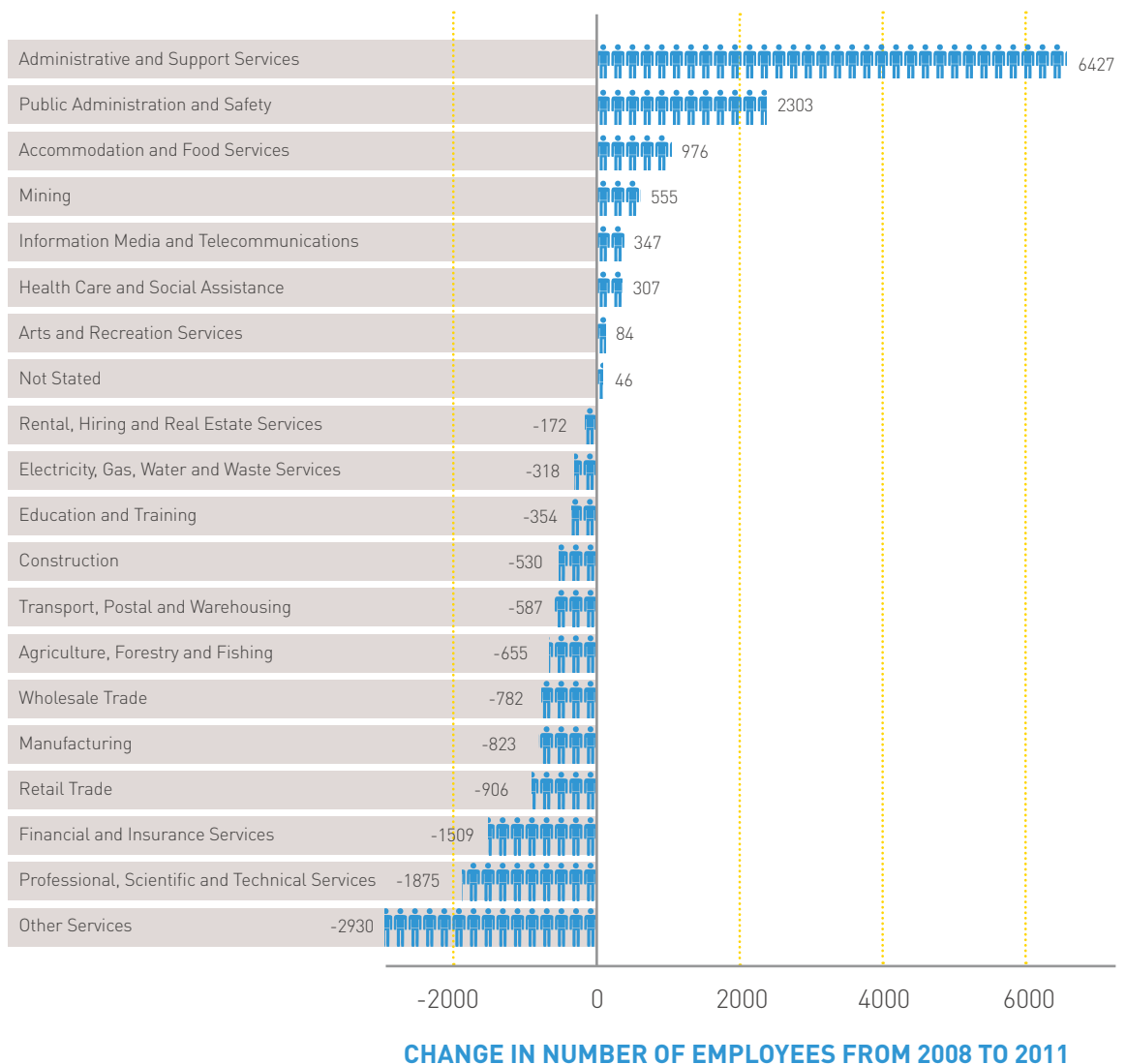
Industries displaying the largest growth in 2011 were 'Administrative and Support Services' and 'Public Administration and Safety' (Fig. 5). The increase in employee numbers in 'Public Administration and Safety' in 2011 was partly driven by the Department of Planning, Transport and Infrastructure<sup>4</sup> which moved its workforce from Walkerville to Grenfell Street in 2010.

'Professional, Scientific and Technical Services' displayed the largest decline in employment in 2011 (Fig. 5), despite the industry being one of the largest employers (Fig. 4).

'Financial and Insurance Services', 'Retail Trade' and 'Manufacturing' were also among the industries showing most decline in 2011 (Fig. 5). Indeed, manufacturing jobs in the City have been declining over the last 15 years: the 1997 census recorded 2186 employees in manufacturing, but by 2011 only 294 people were employed in this industry.

**Figure 5**

**Change in number of employees by industry classifications<sup>5</sup> from 2008 to 2011**



<sup>4</sup>Called the Department of Transport, Infrastructure and Energy at the time of the 2011 census

<sup>5</sup>ANZSIC Divisions

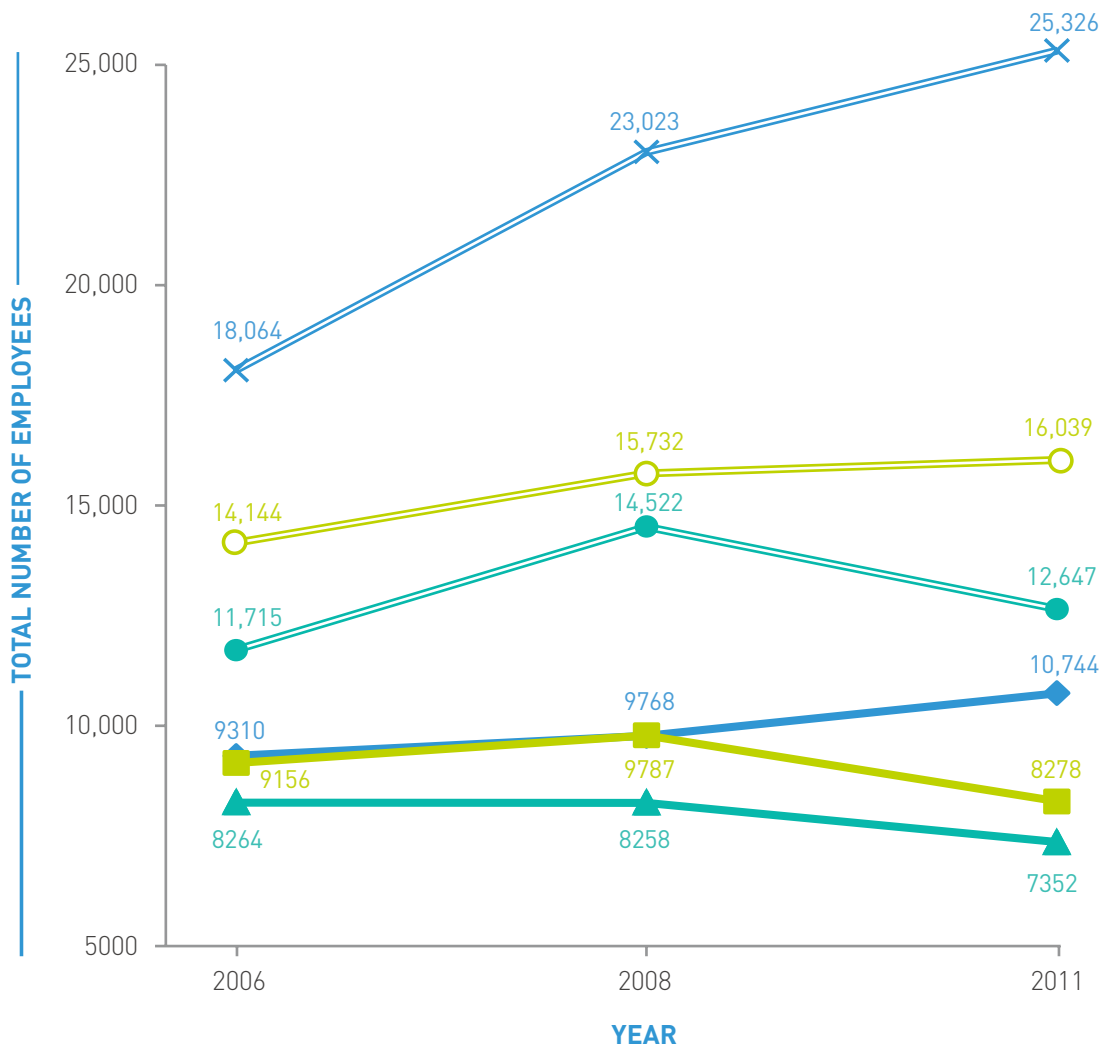


The City's big employer, 'Public Administration and Safety', has shown a steady increase in employment since 2006. 'Accommodation and Food Services', another large employer, and 'Health Care and Social Assistance' also displayed an employment increase over the same period. (Fig. 6)

'Professional, Scientific and Technical Services' and 'Financial and Insurance Services', despite increasing between 2006 and 2008, showed a decline in 2011. For 'Financial and Insurance Services', this decline was to below 2006 levels, which may be indicative of the impacts of the Global Financial Crisis on this industry. (Fig. 6)

**Figure 6**  
**Employment**  
**(number of**  
**employees) for**  
**selected industries in**  
**2006, 2008 and 2011**

- ◆ Accommodation and Food Services
- Financial and Insurance Services
- ▲ Retail Trade
- ✕ Public Administration and Safety
- Health Care and Social Assistance
- Professional, Scientific and Technical Services



## Rundle Mall

Figure 7 displays the top five industries that have employed the largest workforce in the Rundle Mall precinct in 2006, 2008 and 2011.

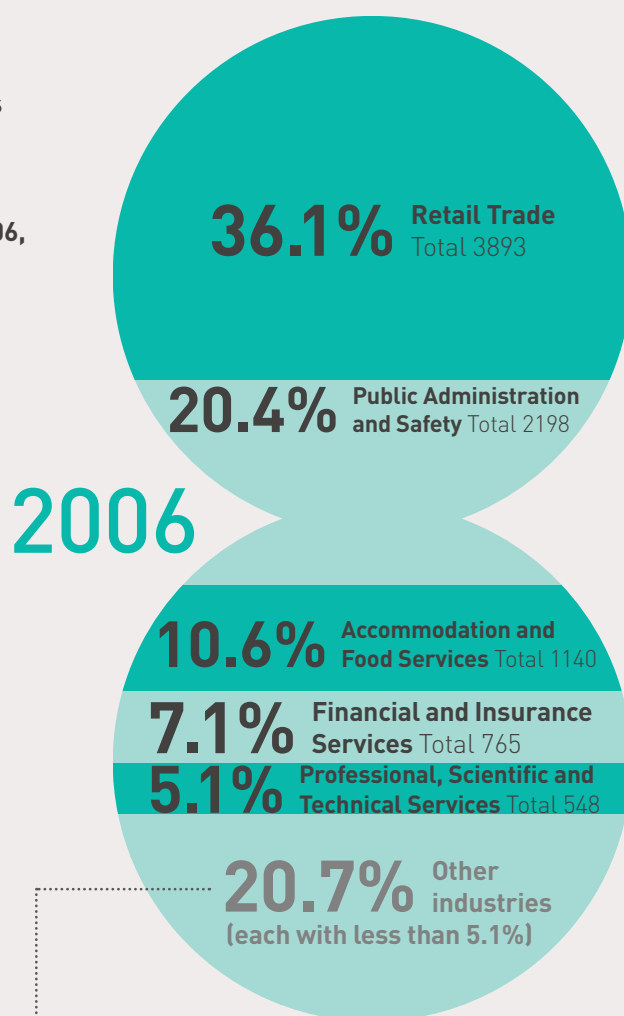
Predictably the industry that employed most people in the Rundle Mall precinct in 2011 was 'Retail Trade' (3071 people or 30%); however this number has been declining since 2006 (3893) and 2008 (3639).

'Public Administration and Safety' (which includes government employment) continued to provide significant employment in the precinct in 2011 (25.2%), increasing by 382 people from 2006 to 2011.

An industry which also showed significant growth in the precinct was 'Administrative and Support Services'. In 2011 it accounted for 7.9% of employment – growth of 91% (384 people) since 2006.

**Figure 7**

**Top five industries  
(number and  
percentage of  
employees) in  
Rundle Mall in 2006,  
2008 and 2011**

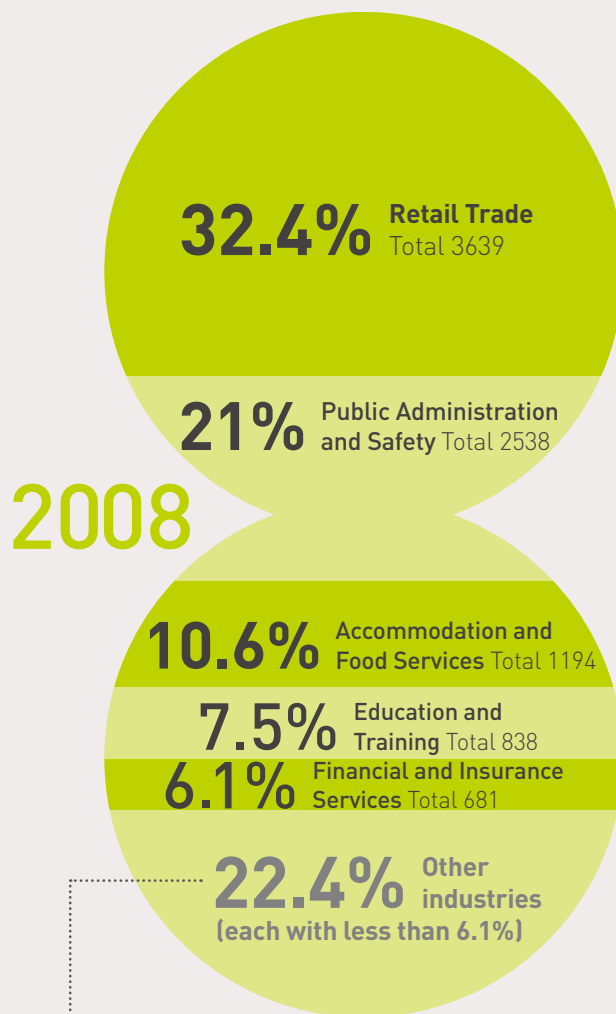


Other industries in Rundle Mall	TOTAL	%
Health Care and Social Assistance	456	4.2
Administrative and Support Services	424	3.9
Education and Training	368	3.4
Other Services	367	3.4
Information Media and Telecommunications	215	2.0
Manufacturing	126	1.2
Rental, Hiring and Real Estate Services	90	0.8
Wholesale Trade	56	0.5
Mining	40	0.4
Arts and Recreation Services	34	0.3
Construction	33	0.3
Electricity, Gas, Water and Waste Services	14	0.1
Transport, Postal and Warehousing	14	0.1

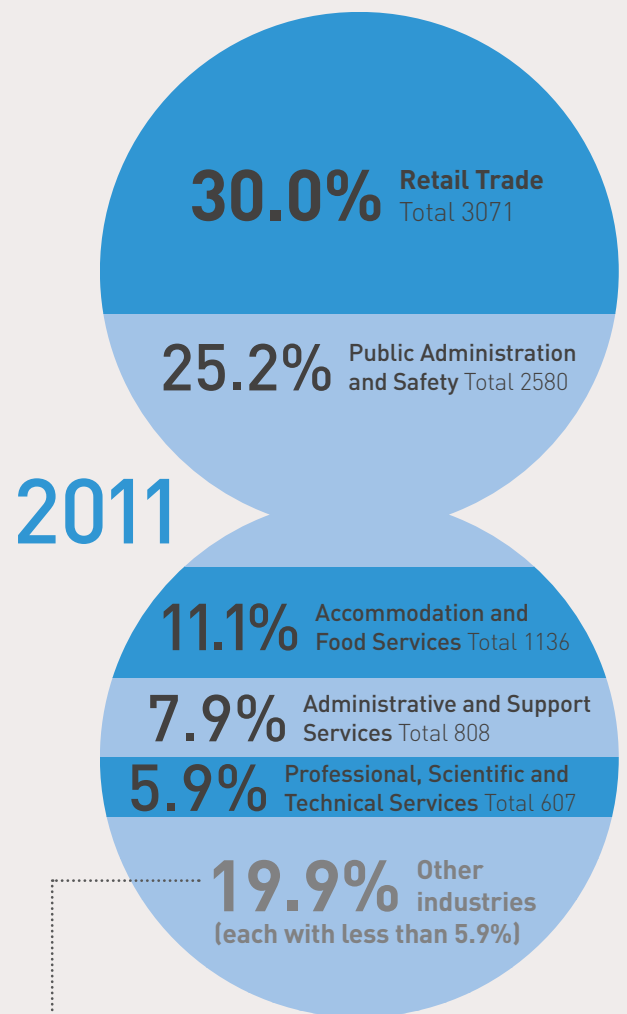
11.1% of the precinct's workforce was employed in 'Accommodation and Food Services' in 2011 – consistent since 2006.

'Professional, Scientific and Technical Services' accounted for 5.9% of the precinct's employment in 2011. This was an increase of 59 people from 2006 levels.

'Financial and Insurance Services' declined by 341 people between 2006 and 2011, and was no longer in the top five employment industries in 2011.



Other industries in Rundle Mall	TOTAL	%
Professional, Scientific and Technical Services	632	5.6
Health Care and Social Assistance	491	4.4
Other Services	465	4.1
Administrative and Support Services	416	3.7
Information Media and Telecommunications	153	1.4
Rental, Hiring and Real Estate Services	95	0.8
Arts and Recreation Services	73	0.7
Manufacturing	71	0.6
Wholesale Trade	56	0.5
Mining	20	0.2
Transport, Postal and Warehousing	18	0.2
Construction	15	0.1
Electricity, Gas, Water and Waste Services	0	0



Other industries in Rundle Mall	TOTAL	%
Education and Training	427	4.2
Financial and Insurance Services	424	4.1
Health Care and Social Assistance	374	3.7
Other Services	305	3.0
Mining	260	2.5
Information Media and Telecommunications	98	1.0
Rental, Hiring and Real Estate Services	84	0.8
Arts and Recreation Services	31	0.3
Manufacturing	18	0.2
Transport, Postal and Warehousing	16	0.2
Electricity, Gas, Water and Waste Services	5	0
Construction	0	0
Wholesale Trade	0	0

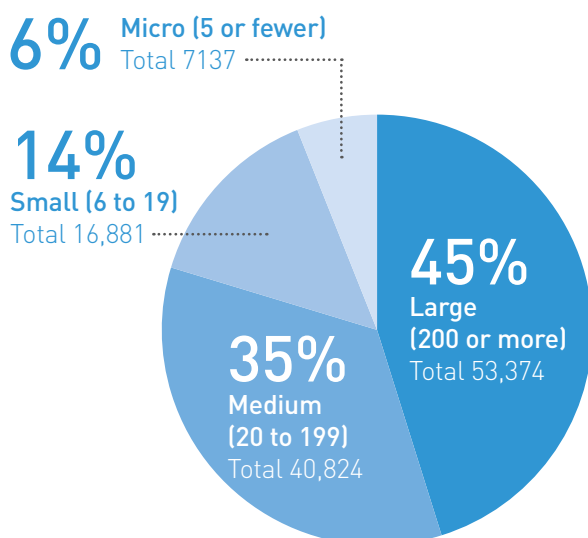
# Business Size

In 2011, large employers (those with more than 200 employees) provided 45% of the total employment in the City, but occupied only 2% of establishments (Figs. 8 and 9).

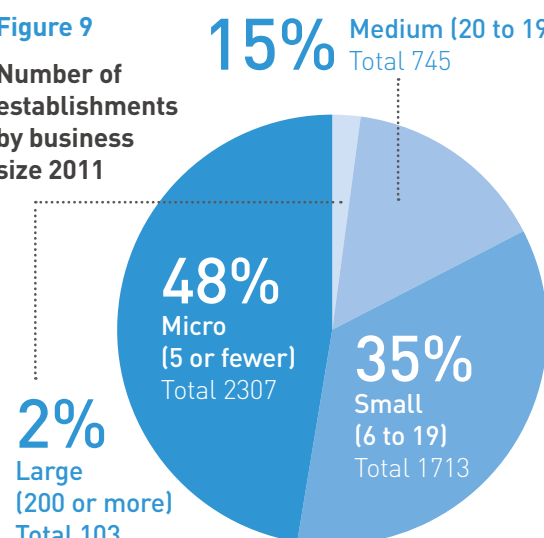
Businesses with five or fewer employees occupied the highest number of establishments (48%) and comprised 6% of the total employment.

The distribution of businesses (establishments) across the three category sizes in 2006<sup>6</sup>, 2008 and 2011 is shown at the bottom of this page (Fig. 10). The number of large and medium businesses remained fairly stable across 2008 and 2011. The number of small and micro businesses declined.

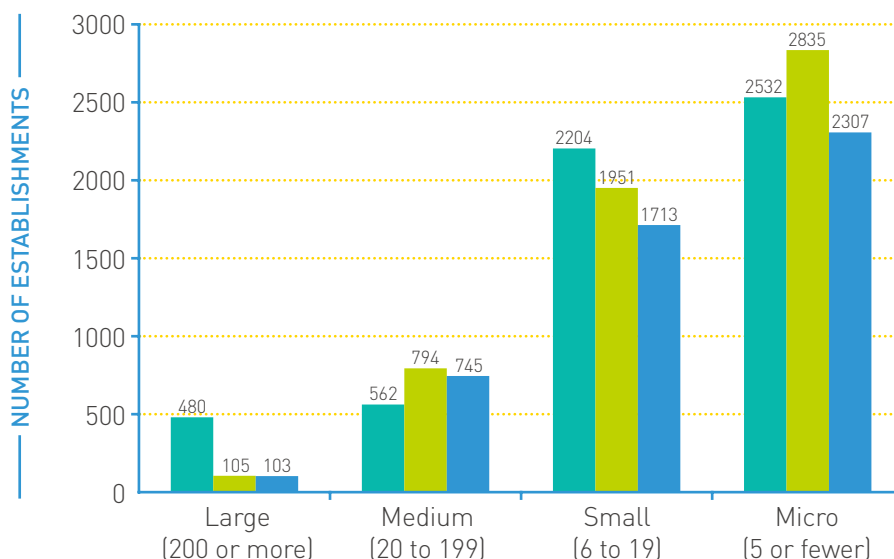
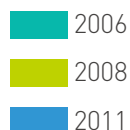
**Figure 8**  
Number of employees by business size 2011



**Figure 9**  
Number of establishments by business size 2011



**Figure 10**  
Number of establishments by business size for 2006<sup>6</sup>, 2008 and 2011



<sup>6</sup>The higher number of large businesses in 2006 may have been due to businesses with establishments in several different locations in the City being counted as separate businesses.

# How Long do Businesses Stay in the City?

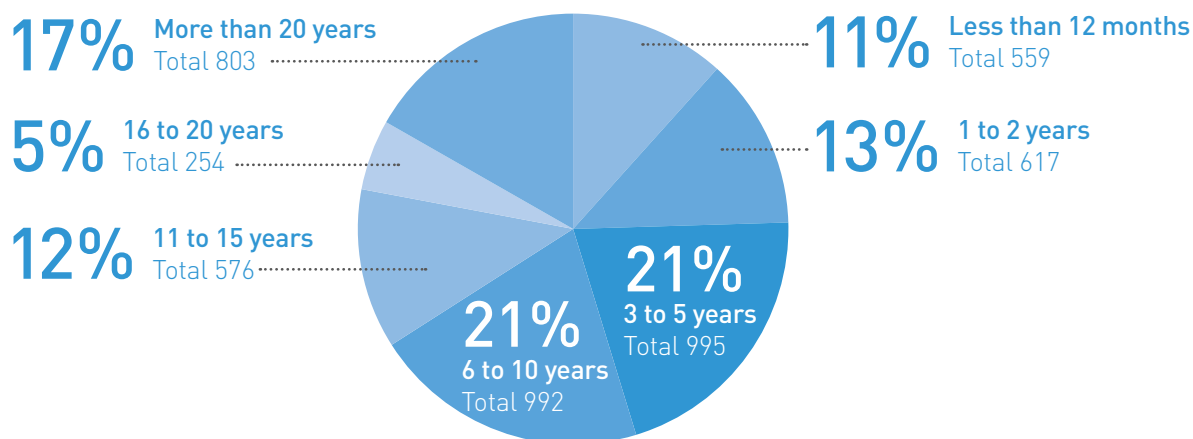
At the time of the 2011 census, most businesses had been operating in the City for three to five years (21%) or six to ten years (21%) (Fig. 11). In 2011, 17% of businesses (803) had been operating for more than 20 years, which is similar to the number recorded in 2008 (15%) (Fig.12).

The number of new businesses (those operating in the City for less than 12 months) was relatively stable for both the 2008 and 2011 censuses (11%) (Fig.12).

The number of businesses operating in the City for 1-2 years and 3-5 years declined between 2008 and 2011 (Fig. 12). However, as a percentage of businesses in the City, those operating for 3-5 years were relatively stable across the period (22% and 21% respectively). A stronger decline is evident in businesses operating for 1-2 years, which declined from 18% of establishments in 2008 to 13% in 2011.

**Figure 11**

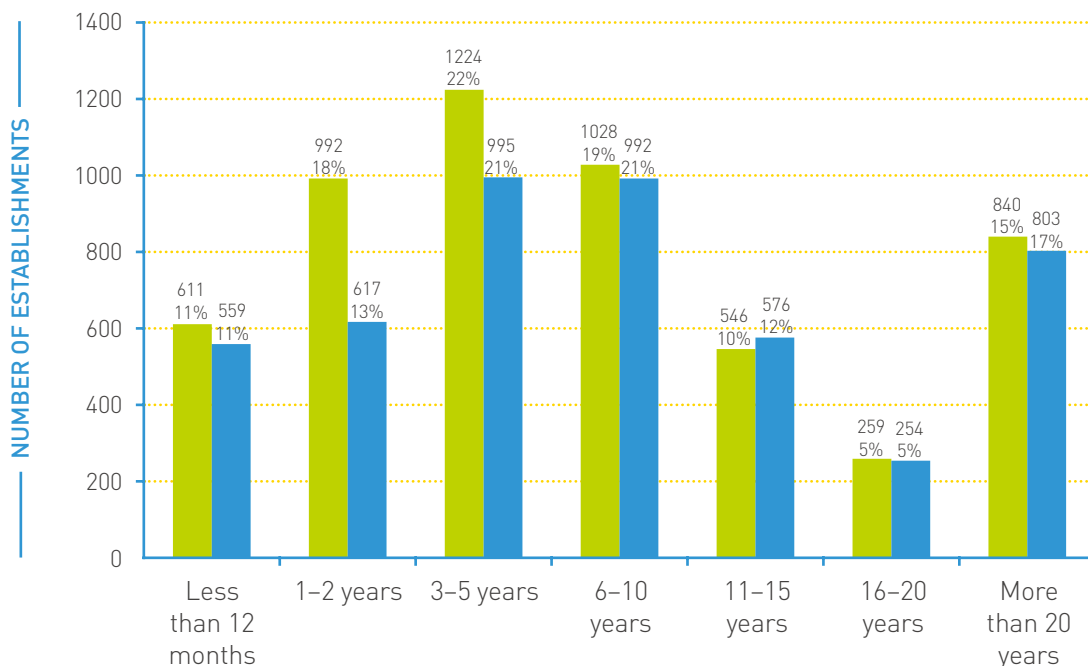
**Duration of stay by establishment in the City, 2011**



**Figure 12**

**Duration of stay by establishment in the City, 2008 and 2011**

2008  
2011



# Vacant Premises

In 2011, there were 1259 vacant premises in the City, an increase from 2008 but similar to the 2006 level. (Fig. 13).

The census recorded the previous land use of vacant premises based on historical census information and observation. The most common previous land uses recorded in 2011 were office space (780 vacant premises) and retail (221 vacant premises) (Fig. 14).

Figure 13

Vacant establishments in the City, 1992 to 2011

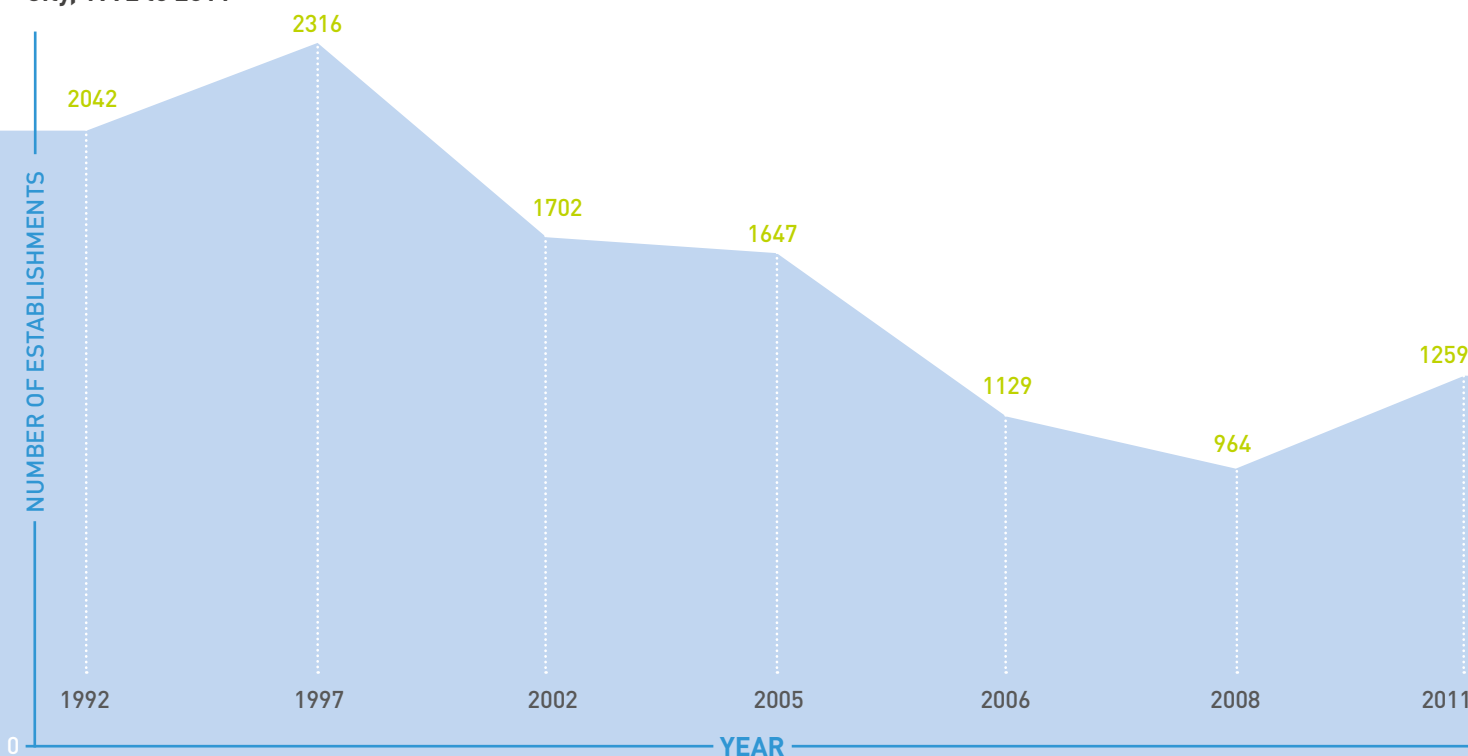
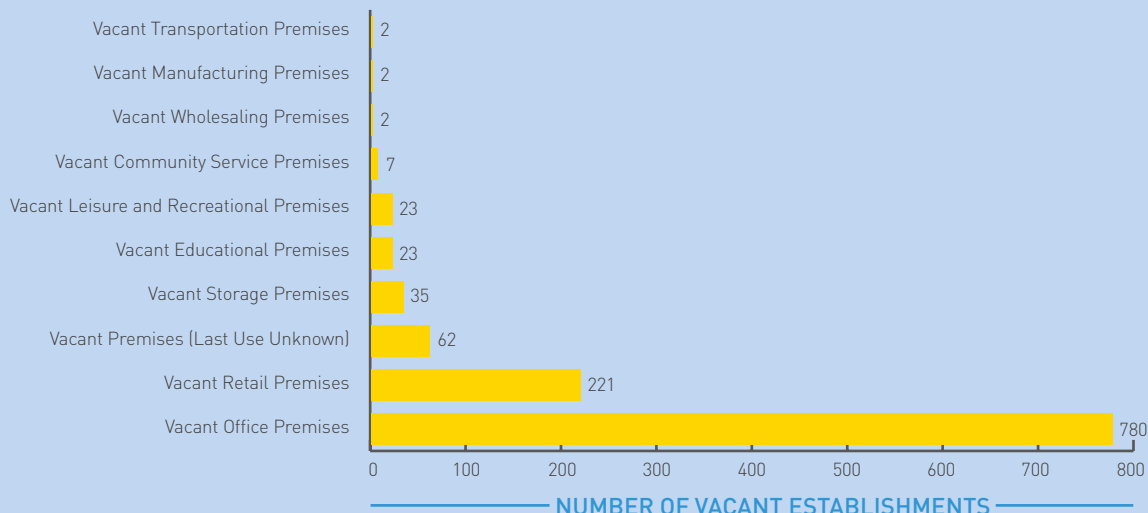


Figure 14

Previous land use categories for vacant premises, 2011



# Venue Capacity

## Cafe and Restaurant Seats

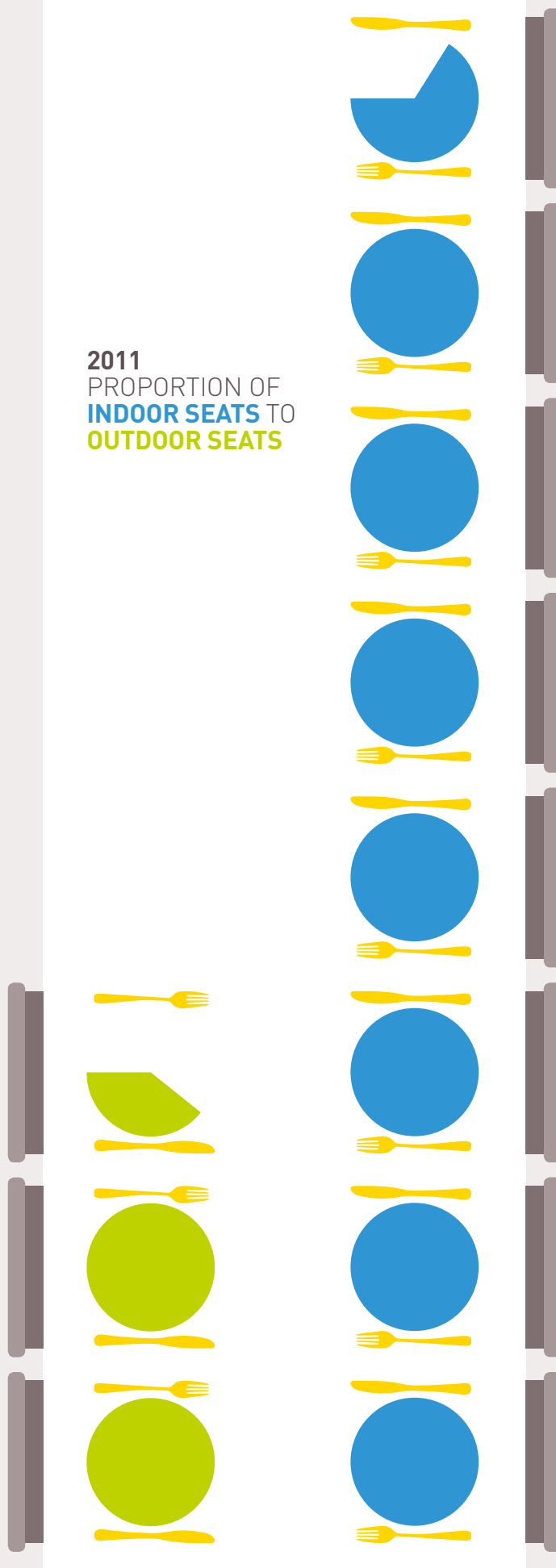
In 2011, the City's cafés and restaurants provided 58,151 seats of which 77% were indoor and 23% were outdoors. This suggests a shift towards more outdoor dining areas when compared to the 2008 numbers (79% indoor and 21% outdoor).

**IN 2006**  
**78%**  
 INDOOR SEATS  
 40,441 TOTAL  
**22%**  
 OUTDOOR SEATS  
 11,440 TOTAL

**IN 2008**  
**79%**  
 INDOOR SEATS  
 39,752 TOTAL  
**21%**  
 OUTDOOR SEATS  
 10,335 TOTAL

**IN 2011**  
**77%**  
 INDOOR SEATS  
 44,708 TOTAL  
**23%**  
 OUTDOOR SEATS  
 13,443 TOTAL

## 2011 PROPORTION OF INDOOR SEATS TO OUTDOOR SEATS

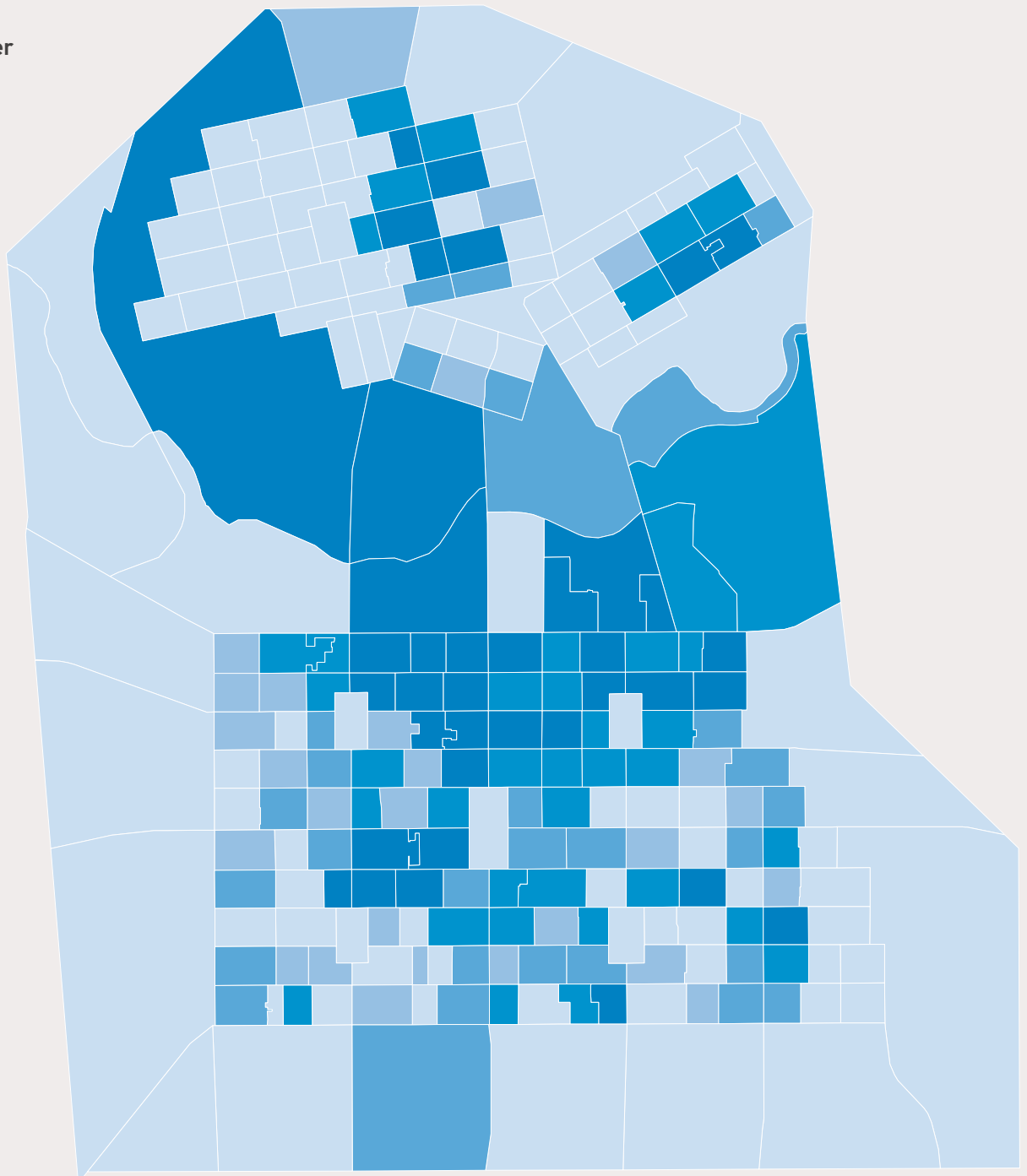
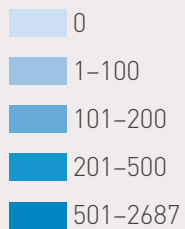


Most of the café and restaurant seats across the City in 2011 were located in the City's entertainment precincts, with more seats in the northern half of the Central Business District, the Central Market precinct and parts of Hutt Street. More seats were also located along O'Connell Street and Melbourne Street and in the venues in the Park Lands. (Fig.15)

Large survey collection blocks were allocated in the Park Lands. This meant that the areas showing restaurant and café seats in the Park Lands were indicative of only one or two venues (e.g. the Adelaide Pavilion in the south Park Lands and the restaurants located at the River Torrens weir).

**Figure 15**

**Total café and restaurant seats per census block, 2011**





## Accommodation

The 2011 census recorded 4845 hotel rooms (commercial accommodation) (Fig. 16). Recent additions to tourist accommodation in the City include the Crowne Plaza at Hindmarsh Square (380 hotel rooms).

Accommodation for backpackers totalled 1028 beds in 2011.

## Entertainment

In 2011, City bars, pubs and taverns were licensed for a total number of 34,301 people (Fig. 16).

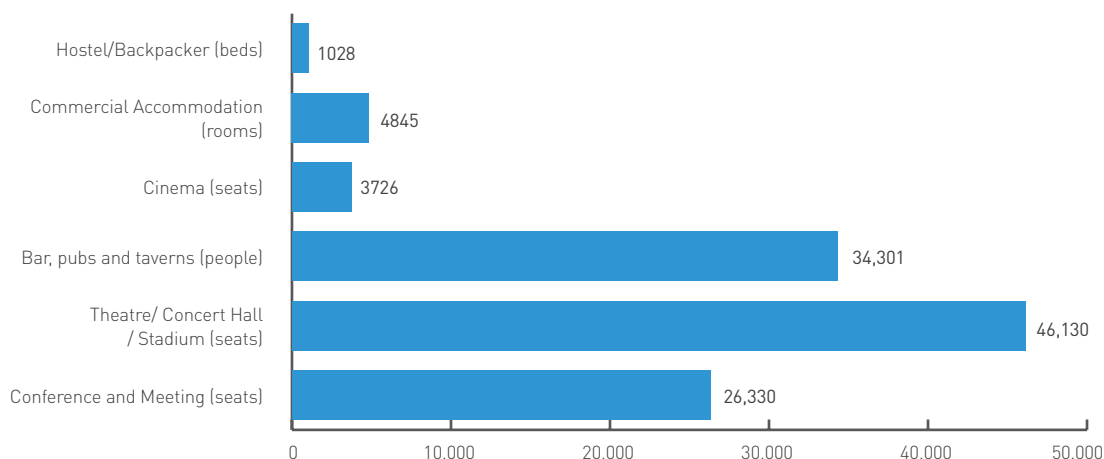
Also in 2011 there were 46,130 seats in City theatres, concert halls and stadium venues. This included venues that open only occasionally (e.g. the Bakehouse and Royalty

theatres). And, the City had 3726 cinema seats, of which 2808 were mainstream cinemas open every day to the public (Fig. 16).

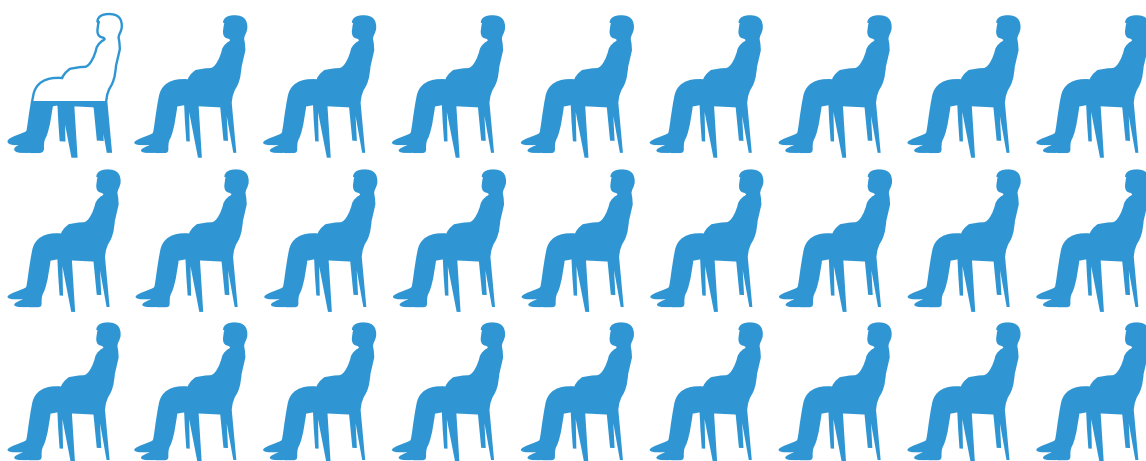
In 2011, the City had a total of 26,330 seats in meeting and conference venues, a decline of 1.3% compared to 2008 (26,692 seats).

Figure 16

Selected venue and accommodation capacity, 2011



1000 x



**26,330 FOR MEETINGS**  
**SEATS AVAILABLE AND CONFERENCES**

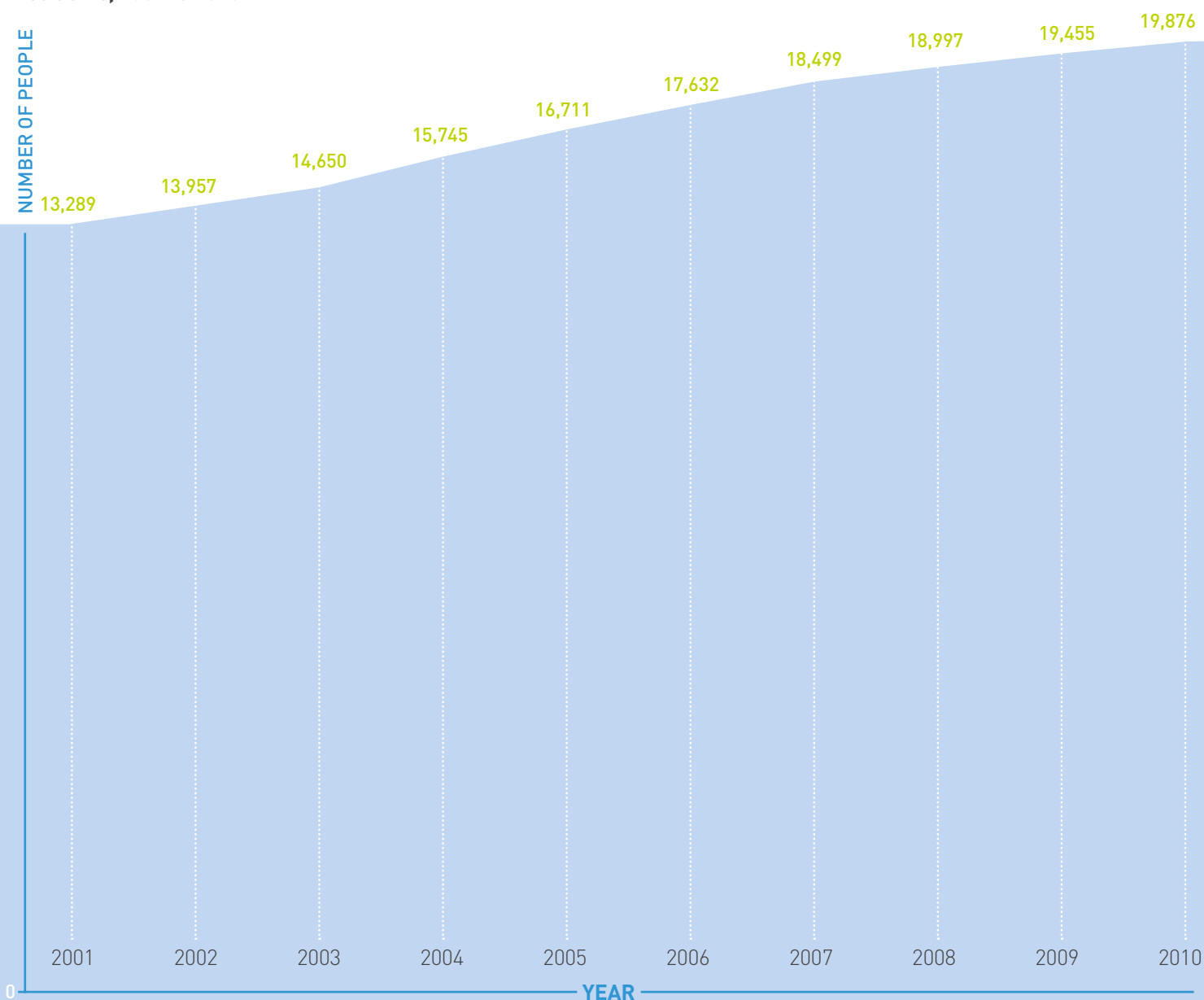
# City Living

The City's population has been increasing since 2001 with 19,876 residents estimated to be living in the City in 2010 (Fig. 17). This was an estimated increase of 6587 residents (or 50%) from 2001 to 2010.

The South Australian Government's 30 Year Plan for Greater Adelaide sets a target of 27,300 more City residents by 2040, which would increase the City's population to 47,176 (based on 2010 estimates).

**Figure 17**

**Estimated number of residents, 2001 to 2010<sup>7</sup>**



<sup>7</sup>Australian Bureau of Statistics, 2011, Population Estimates by Local Government Area 2009-10, 3218.0.

## Residential Dwellings

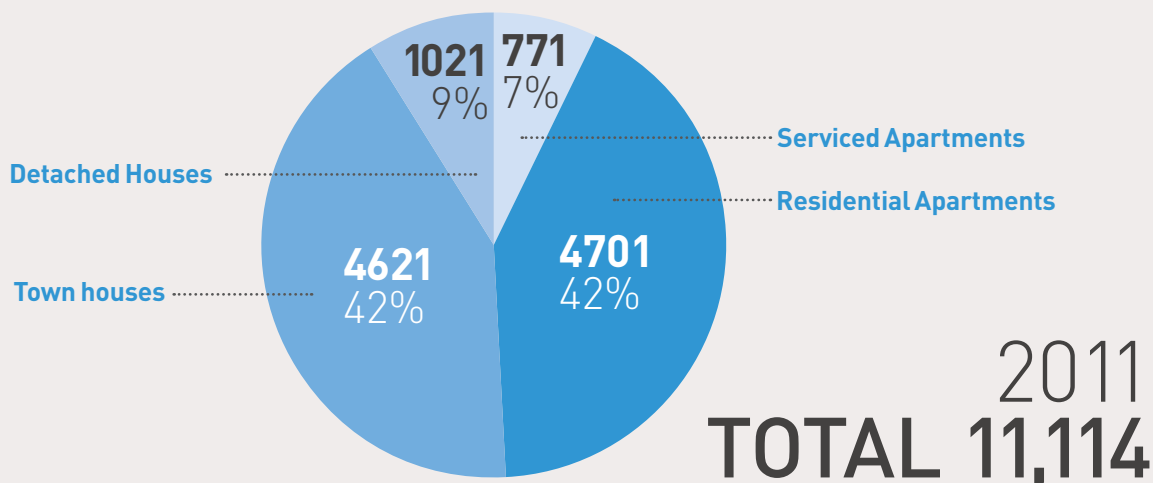
The 30 Year Plan for Greater Adelaide sets a target of 15,040 more dwellings in the City to accommodate its proposed growth in residents. This would increase the total number of dwellings to 26,154.

The 2011 census recorded 11,114 dwellings in the City, an increase of 3% from 2008 (10,766 dwellings). Of these, the most numerous dwelling type was apartments (42.3%) followed by townhouses (41.9%) (Fig. 18).

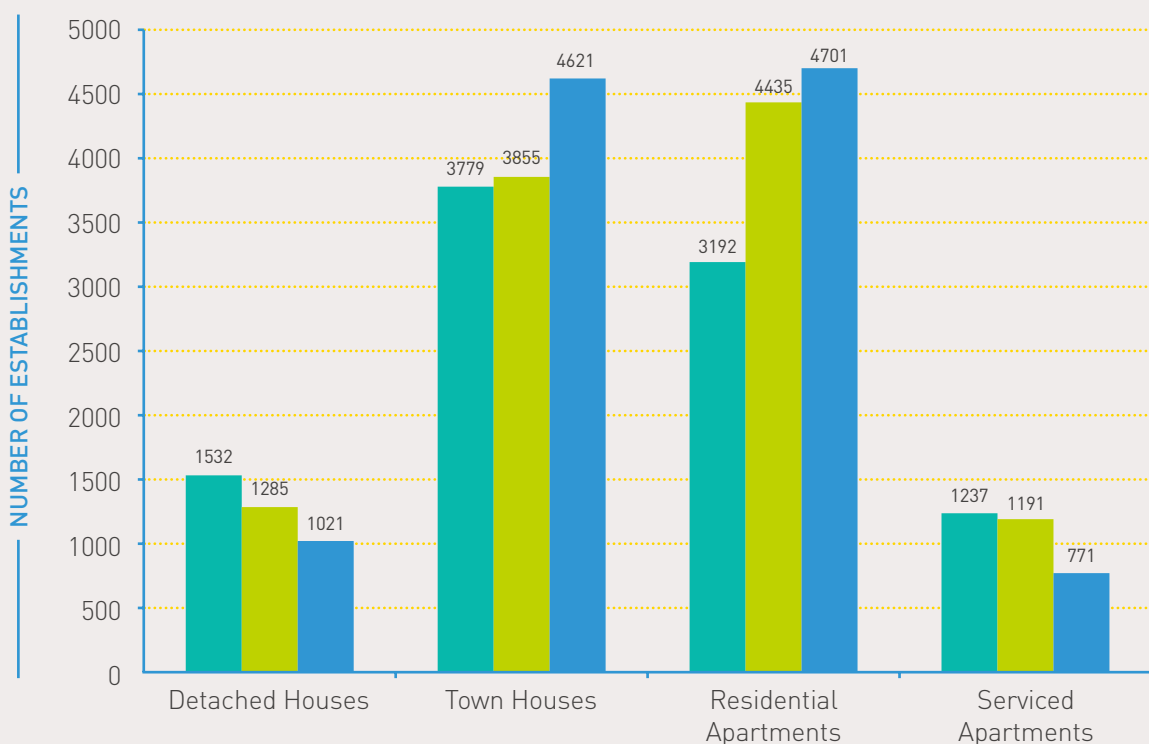
Since 2008 the number of townhouses has increased by 20% (766 dwellings), whereas the number of apartments has increased by only 6% (266 dwellings). This may indicate a slowing in apartment construction. (Fig. 19)

The number of serviced apartments decreased from 2008 to 2011, which may be due to the reclassification of some serviced apartments to commercial accommodation (Fig. 19).

**Figure 18**  
Dwelling types  
(number and  
percentage), 2011



**Figure 19**  
Dwelling types for  
2006, 2008 and 2011



# Car Parking

In 2011, 24,297 commercial car parking spaces were recorded in the City (Fig. 20).

The number of commercial car parking spaces in the City had declined since 1997. However, the number recorded in 2011 was a slight increase (8%) compared to 2008.

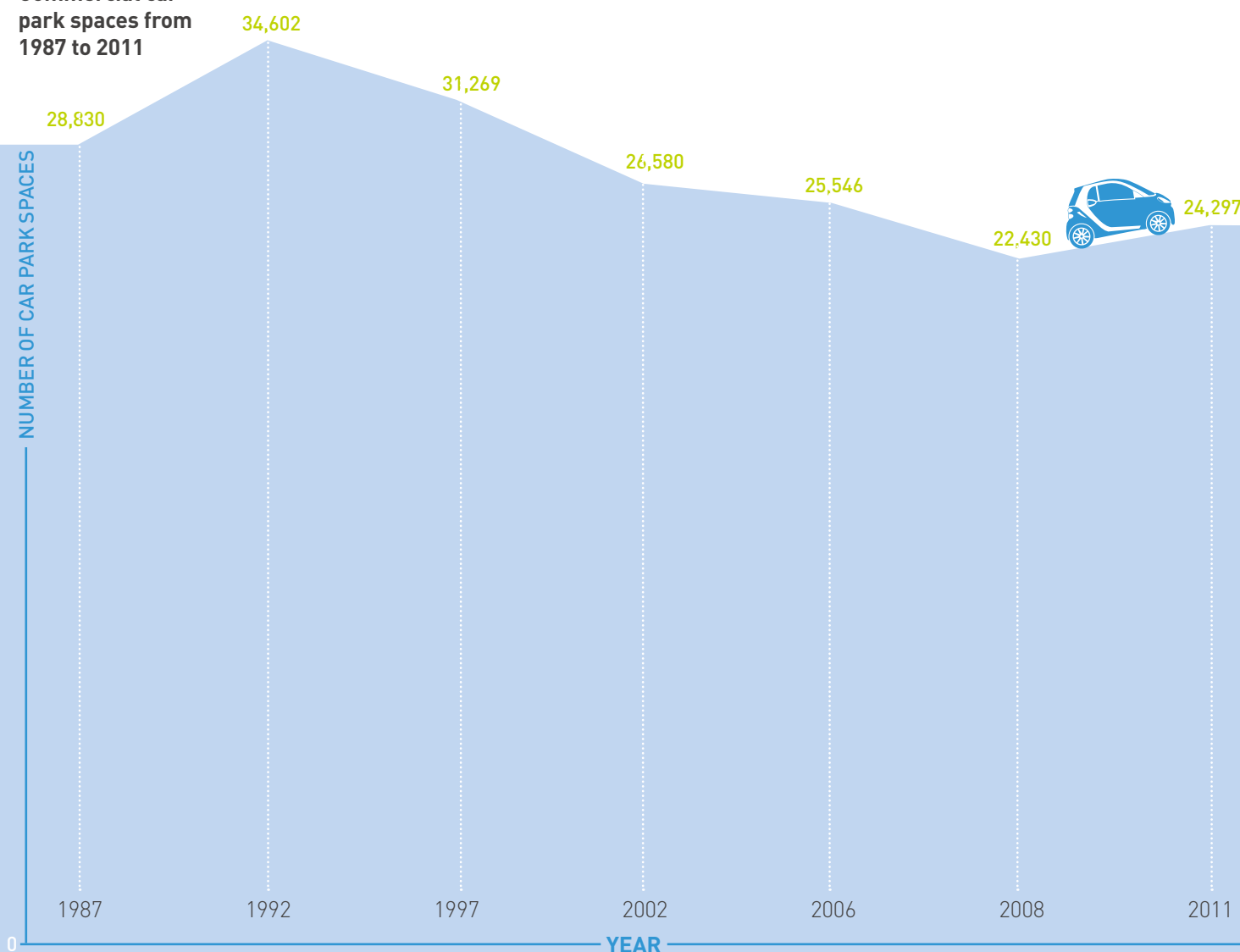
Adelaide City Council owns and operates UPark, a commercial car parking business.

With 6200 spaces across 10 parking stations, UPark provides about 25% of the City's commercial car parks.

With an additional 18,400 on-street car parking spaces, the City had 42,697 publicly available car parking spaces in 2011. This is 24% more car parks than provided in Brisbane and 39% more than provided in Melbourne<sup>8</sup>.

**Figure 20**

**Commercial car park spaces from 1987 to 2011**



<sup>8</sup>Adelaide City Council, 2011, Integrated Movement Strategy (draft)

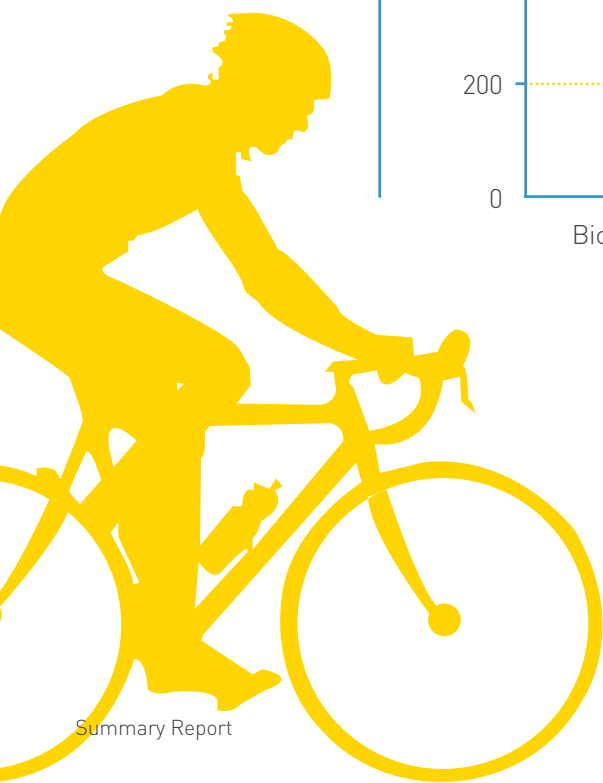
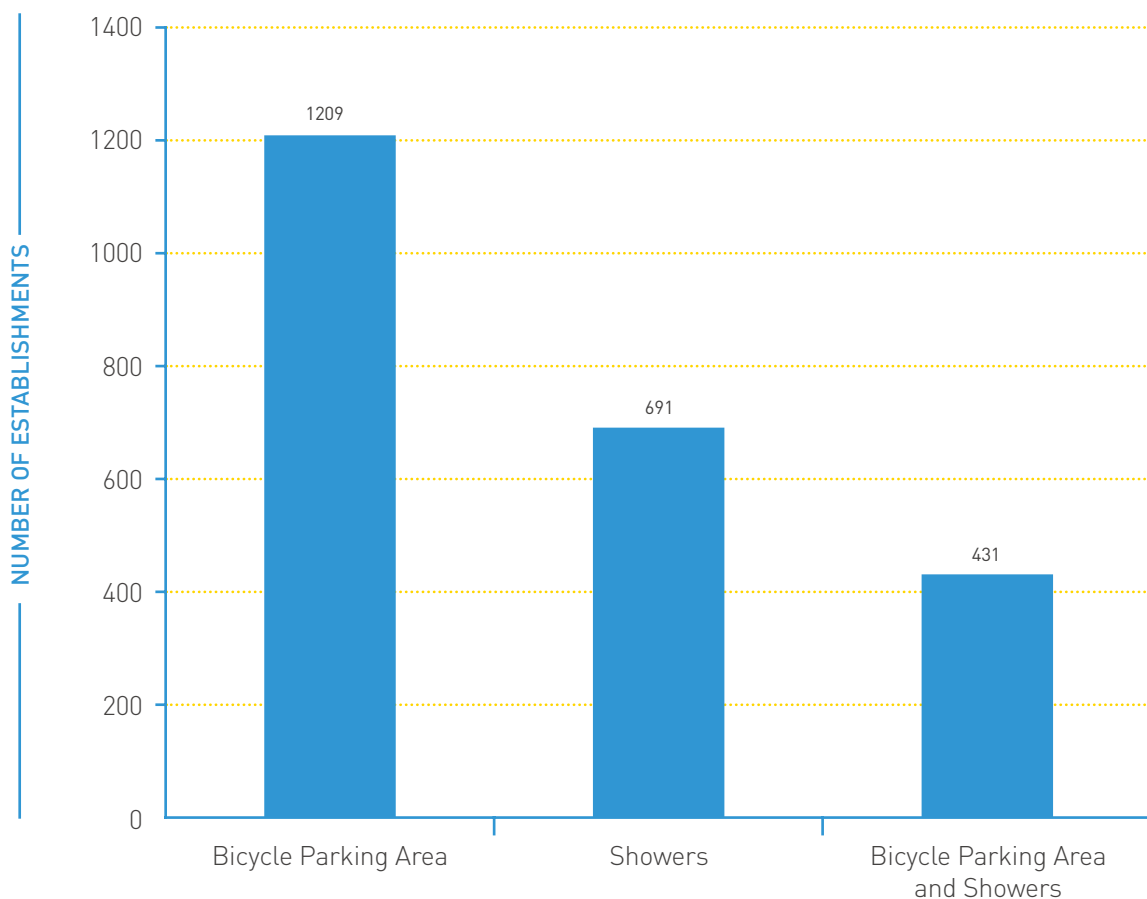
# Bicycle Parking and Facilities for Employees

The City has 60 kilometres of on-street bike lanes and a network of shared paths in the Park Lands and along the River Torrens. Traffic counts show that between 2003 and 2010, cycling to the City increased by 40%<sup>9</sup>.

In the 2011 census, 1209 workplaces provided secure bicycle parking for their employees, with 431 providing both bicycle parking and shower facilities (Fig. 21).

**Figure 21**

**Bicycle facilities by establishment, 2011**



<sup>9</sup>Adelaide City Council, 2011, Integrated Movement Strategy Discussion Paper

## References

Adelaide City Council, previous Adelaide City Censuses of Land Use and Employment

Adelaide City Council, 2011, Integrated Movement Strategy Discussion Paper 2 – Sharing Street Space

Adelaide City Council, 2011, Integrated Movement Strategy (Draft)

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Australian Bureau of Statistics, 2011, Population Estimates by Local Government Area 2009-10, cat. no. 3218.0

SA Department of Planning and Local Government (2010), The 30 Year Plan for Greater Adelaide: A volume of the South Australian Planning Strategy

## More Information

This report presents a summary of the results available from the ACCLUE dataset.

The ACCLUE in 2011 collected information on a variety of topics including:

- » Land use (industry) for businesses and organisations
- » Number of employees for businesses and organisations
- » Buildings with showers facilities and bicycle storage
- » Residential dwelling types
- » Offstreet car parking
- » Duration of stay for businesses
- » Vacant establishments

Please contact Adelaide City Council if you are interested in further information on employment and land use within the City of Adelaide on (08) 8203 7203 or at [City@adelaidecitycouncil.com](mailto:City@adelaidecitycouncil.com)

The level of detail of information released by Adelaide City Council from the ACCLUE is subject to confidentiality to ensure the privacy of businesses is respected.





**Contact: Adelaide City Council**

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**F** (08) 8203 7575

**E** [City@Adelaidecitycouncil.com](mailto:City@Adelaidecitycouncil.com)