

Community engagement on the Jetty Road Glenelg Master Plan Report

City of Holdfast Bay

24 May 2024

Intuito
MARKET RESEARCH

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1. Introduction

We are pleased to be able to provide this market research report to the City of Holdfast Bay on a survey we conducted to gauge the attitude of residents (ratepayers) and businesses toward a 3-year rate increase to fund the Transforming Jetty Road Glenelg Project.

The brief

Council is interested in obtaining a representative opinion from residents (across all age groups and suburbs) on their support for Council's \$30 million funding of the Transforming Jetty Road Project. There is a potential that those living outside of Glenelg may not be as willing to assist with funding through increased rates for a period of 3 years because it doesn't affect them directly or they do not regularly visit Jetty Road Glenelg. This research was designed to capture the views of a fair representation of all ratepayers.

Ratepayers will be subject to the usual CPI increases in their rates plus a 'levy' of around 2.3% above the CPI (a total increase likely this year of 7.1% compared to 6.9% in 2023 due to high inflation). These annual increases will be in place for three years for the duration of the redevelopment.

The core question that is requiring an answer from a representative sample of residents / ratepayers is:

- Are ratepayers comfortable paying for the Transforming Jetty Road Glenelg Project in the form of increased rates for the next three years?

Other questions:

- Do ratepayers think Jetty Road Glenelg needs an upgrade?
- What value do residents of the area place on improving safety, lighting, appeal of the main street, placemaking, greening, and the ability for more activation to provide entertainment and attractions for residents?

Market research objectives

The overarching objective of this study is to determine if most ratepayers are comfortable paying for the Transforming Jetty Road upgrade in the form of increased rates for the next three years. Specific objectives included:

- Level of acceptance that Jetty Road Glenelg needs to be upgraded (it is important) for the benefit of residents and visitors.
- Level of acceptance that ratepayers should pay for the upgrade.
- Level of acceptance that Jetty Road Glenelg will be more appealing / safer / greener / better activated at the conclusion of the Jetty Road Master plan upgrade.
- Level of acceptance that this upgrade will ensure the Council area is more attractive as a residential area to live, work and play.
- Residents will be more likely to visit Glenelg for their shopping, dining, and entertainment needs because it will be modern, safe, and vibrant.
- Gauge the level of understanding of the communication around the redevelopment including timing and stages.
- Gauge the level of understanding that the Council has been successful in gaining 25% funding through the Federal Government (thus reducing the reliance on ratepayer contributions).

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- Will ratepayers accept a 7.1% increase in their rates for the coming year and approximately the same levels of increases over the following two years given the cost-of-living issues Australia wide.

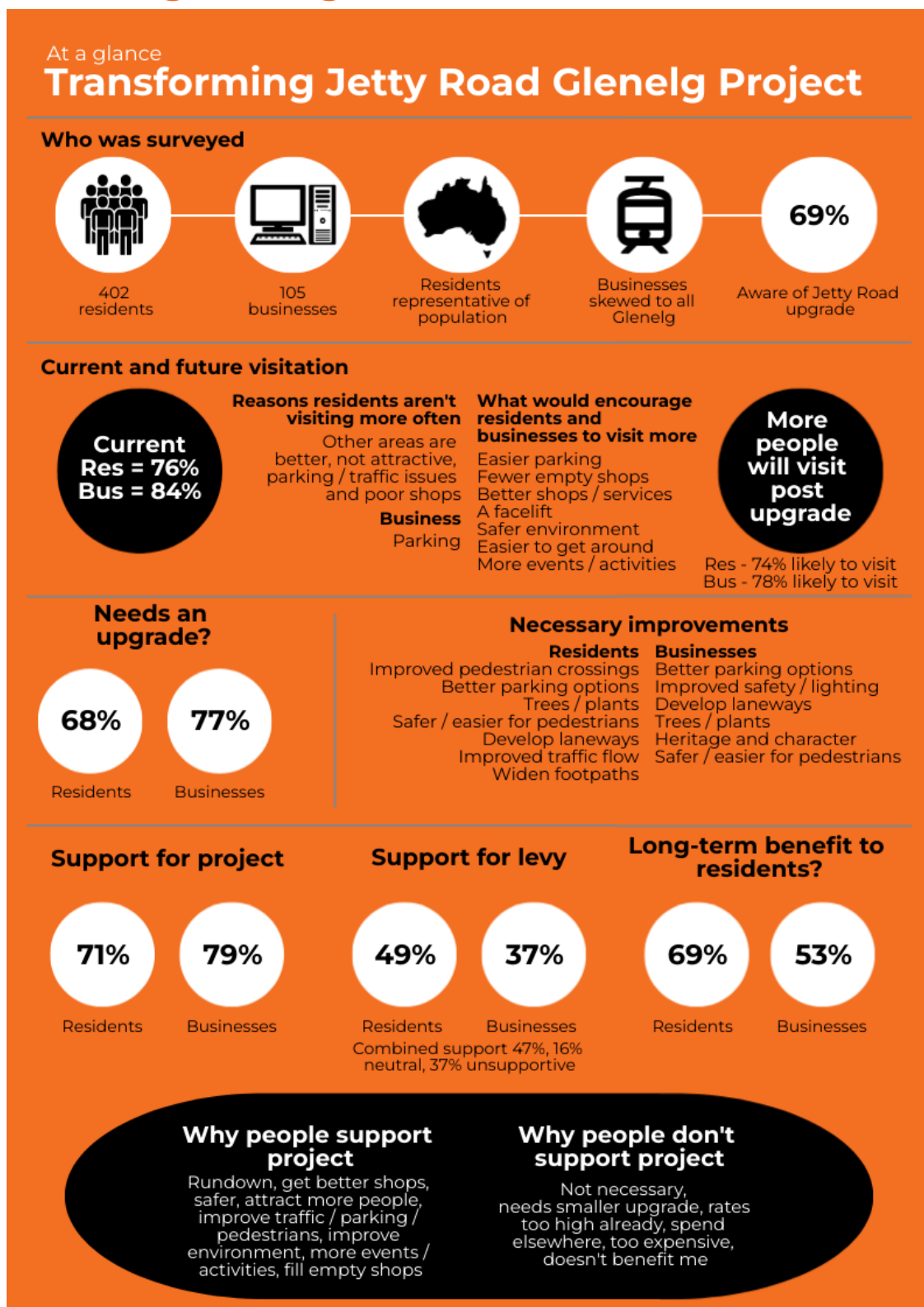
Specifically, Council seeks to understand the above based on age of resident and residential location as there will be variability of attitudes within the city.

Methodology

We conducted the survey face-to-face with residents and we used a combination of online and face-to-face for businesses. As outlined in our proposal we achieved a sample of 402 residents and 105 businesses. The surveys were similar but with slight word changes depending on the cohort and we report on them together in this one document. We have sampled as close to the population breakdown as possible noting that the younger age brackets are extremely difficult to survey face-to-face even though our interviewers worked longer days than usual to capture this demographic.

Interviewing began on Wednesday, 24th April, 2023 and was completed by Friday, 17th May, 2024.

2. Findings at a glance



3. Executive Summary

About the respondents

Residents were from a mix of suburbs across the city with a good mix of the length of time they have lived in the area. 55% of those in this surveyed have lived in the City of Holdfast Bay for less than 10 years, 15% for 11-20 years and 30% over 20 years. 49% were employed and 43% retirees and 8% in other employment. There was good mix of household income with approximately 50% earning less than \$100,000pa and 50% over \$100,000pa. There was a slight skew to females and all age brackets were represented in accordance with the population except for under 30-year-olds that were slightly under represented.

Businesses were skewed toward Glenelg locations but there was a representation from each of the city's suburbs. 43% of businesses have operated for up to 10 years, 21% for 11-20 years and 36% more than 20 years. 58% of the businesses employed 1 – 19 people and 42% more than 20, most had turnovers of less than \$2 million pa. 32% of all businesses were retail, 23% accommodation & food, 17% rental, hiring and real estate services, 13% health care and social assistance, 9% professional services.

Awareness of the upgrade

69% of residents and 68% of businesses claimed to be aware of the Jetty Road upgrade before this survey. Residents and businesses in Glenelg were more likely to know about it than others.

Visitation to Jetty Road, Glenelg

There is high visitation amongst residents with 76% indicating they visit weekly or more often compared to 69% of businesses. Of businesses, there were another 14% that work on Jetty Road Glenelg taking the visitation to 84%.

Reasons for not visiting more often

70 people who visit monthly or less often were asked why they don't visit more often. Amongst residents the main reasons were other areas are better / easier, no interest / lacks attractiveness, parking / traffic issues and shop selection is poor.

10 business respondents talked about parking issues or simply not being interested or close by.

What would encourage people to visit more often

This question was asked of all residents and businesses. For residents the following would encourage people to visit more often:

- fewer empty shops
- easier parking
- better selection of shops / services / activities
- cleaner / needs a facelift
- a safer environment
- more accessible
- more events and activities

For businesses:

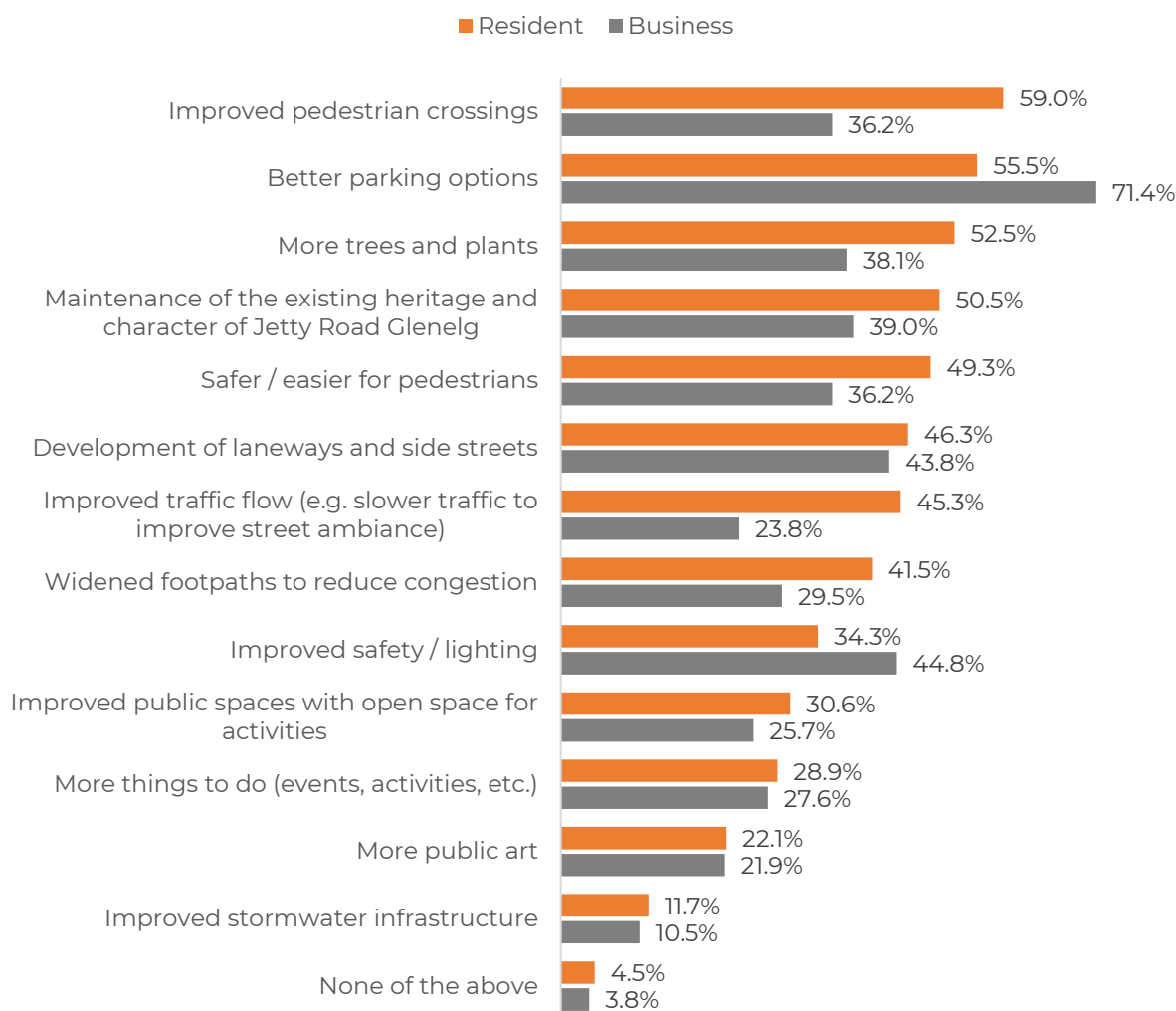
- easier parking
- better selection of shops / services / activities
- cleaner / needs a facelift
- safer
- fewer empty shops

Percentage that believes Jetty Road Glenelg needs an upgrade

70% of residents believe it needs an upgrade compared to 77% of businesses.

Necessary improvements to Jetty Road, Glenelg

There were slight differences between residents and businesses. Residents are more likely to nominate access issues, pedestrian crossings, better parking options, improved traffic flow, widened footpaths, improved safety / lighting whereas business were more focussed on parking issues and development of laneways / side streets. Both cohorts are also interested in the maintenance of the heritage and character of the main street and greening.



Support for the project

When asked how supportive residents and business are of the project, business was slightly more supportive than residents. Across both demographics the support is very strong.

Residents

Unsupportive	Neutral	Supportive
7.4%	21.8%	70.9%

Businesses		
Unsupportive	Neutral	Supportive
8.3%	12.5%	79.2%

We net promoter scored the above and residents was a positive 12 and business was a positive 25.

Reasons for support

Residents

Upgrade needed
Attract more shops
Safety / remove homeless
Attract more people to area
Improve accessibility
Improve environment
More activities / events

Businesses

Upgrade needed
Attract more people to area
Attract more shops
Improve environment
Improve accessibility
Improve safety
Will be a positive for all

Reasons for lack of support

Residents

Not necessary
Smaller upgrade needed
Rates too high already
Too expensive

Doesn't benefit me

Businesses

Not necessary
Money should be spent on safety

Likelihood of increased visitation

Residents are slightly more likely to visit Jetty Road Glenelg more often post an upgrade than businesses (using the mean scores but looking at likelihood below there are more businesses likely).

Residents		
Not likely	Neutral	Likely
7.5%	18.9%	73.6%

Businesses		
Not likely	Neutral	Likely
7.3%	14.6%	78.1%

Supportive of a rate increase of 2.3%

Residents are slightly more supportive than businesses. When we add both residents and businesses together 46.7% are supportive compared to 37% who are unsupportive. Support is greater in the younger cohorts (18-54 years) and those living near by (Somerton Park, Glenelg, Glenelg North, and Glenelg South) and high-income earners. Those who are unsupportive are more likely to be 55+ years, low-income earners and those living further away from Glenelg including Brighton and south of Brighton.

Businesses more supportive are Glenelg and Brighton businesses. Businesses not supportive tend to be from Somerton Park, Glenelg East, North and South, North Brighton, and Hove.

Residents		
Unsupportive	Neutral	Supportive
36.8%	13.9%	49.2%

Businesses		
Unsupportive	Neutral	Supportive
38.1%	24.8%	37.1%

Combined total		
Unsupportive	Neutral	Supportive
37.1%	16.2%	46.7%

Will this upgrade benefit residents long term?

69% of residents think there is a benefit compared to only 53% of businesses.

Conclusions

Clearly this project is divisive within the City of Holdfast Bay but the majority believe Glenelg needs an upgrade. Those that are unsupportive of this project still acknowledge that a smaller project to clean up Glenelg is needed they are just opposed to the quantum of the expenditure for the Transforming Jetty Road Glenelg project thinking overall that \$40 million expenditure is not necessary.

Residents and businesses acknowledge that there is safety, parking, pedestrian, traffic flow, footpath congestion and lighting issues with Jetty Road Glenelg. Residents are more inclined to highlight accessibility and pedestrian safety issues whereas businesses are more inclined to focus on better parking options, improved lighting, and overall development of the area to attract more tourists and residents to the area.

Overall support for the project is high amongst both cohorts (seven out of ten or higher) with more people promoting the project than detracting. But more importantly there are only small percentages of residents and businesses that are unsupportive (7.3% of residents and 8.3% of businesses).

Naturally support for a rate increase in a cost-of-living crisis does not have the support of all residents but 49% of residents support assisting with the funding through rate increases over the next three years and 37.1% of businesses support it too. The support outweighs the unsupportive at 36.8% for residents but is equal for businesses at 38.1%. It should be noted that business is doing it tough now suffering too from the cost-of-living crisis as we have seen recently with the bi-annual business survey for the City of Holdfast Bay.

Overall support (residents and businesses combined) is 46.7% compared to 37.1% who are unsupportive and a further 16.2% who are neutral (neither supportive nor unsupportive). We think these statistics gives you the edge to proceed with this project. It will need some considerable communications (ongoing) to convince those that are unsupportive (largely those that are older and living on tight budgets and living further away from Glenelg in your southern suburbs) of the benefits long term to the area. Most residents (69%) accept that this upgrade will benefit residents long term and so do 53% of businesses.

Council will be the target for some flak because of this but we think you will need to weather this and stay the course for the long-term gains of the project.

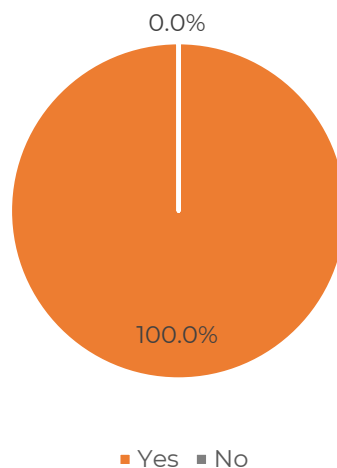
4. Key Findings

Most questions were asked of both residents and businesses, but in two different surveys, because of this some question numbers are different between the two cohorts. These have been indicated question by question as we go through the key findings.

Screeners questions

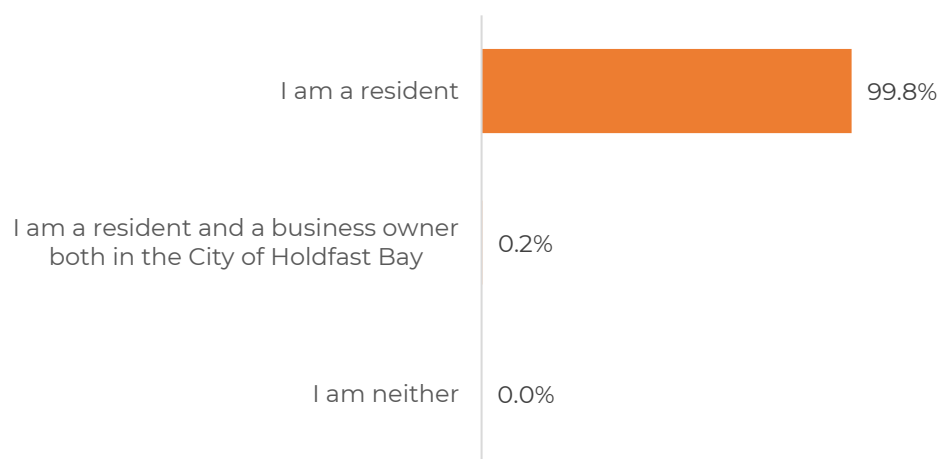
Residents – Q1. Are you aged over 18?

Are you aged over 18?



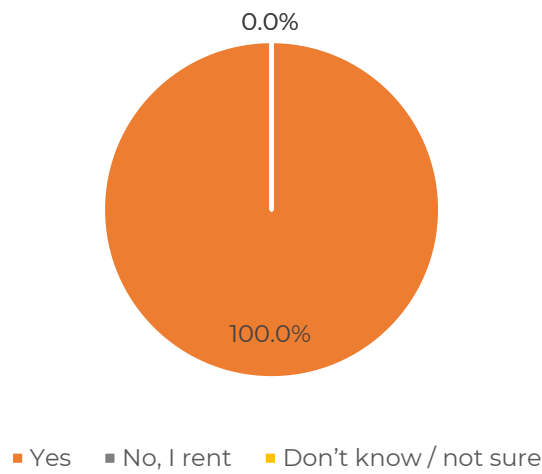
Residents – Q2. Do you live in the City of Holdfast Bay?

Resident or business? n=402



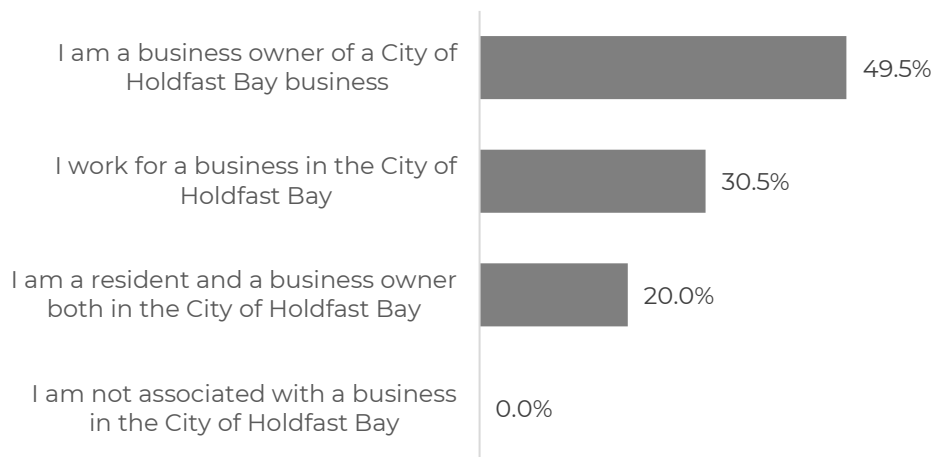
Residents – Q3. Are you or your household ratepayers?

Are you or your household ratepayers? n=402



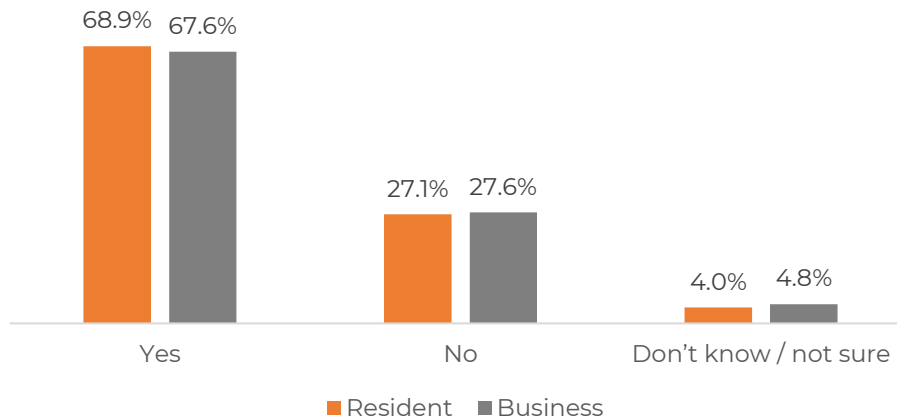
Businesses – Q1. Are you a business owner in the City of Holdfast Bay?

Business owners n=105



Q6: Were you aware before now that this upgrade had been announced?
(Business survey Q4. Were you aware before now that this upgrade had been announced?)

Awareness of the Jetty Road upgrade
n=402 R, n=105 B

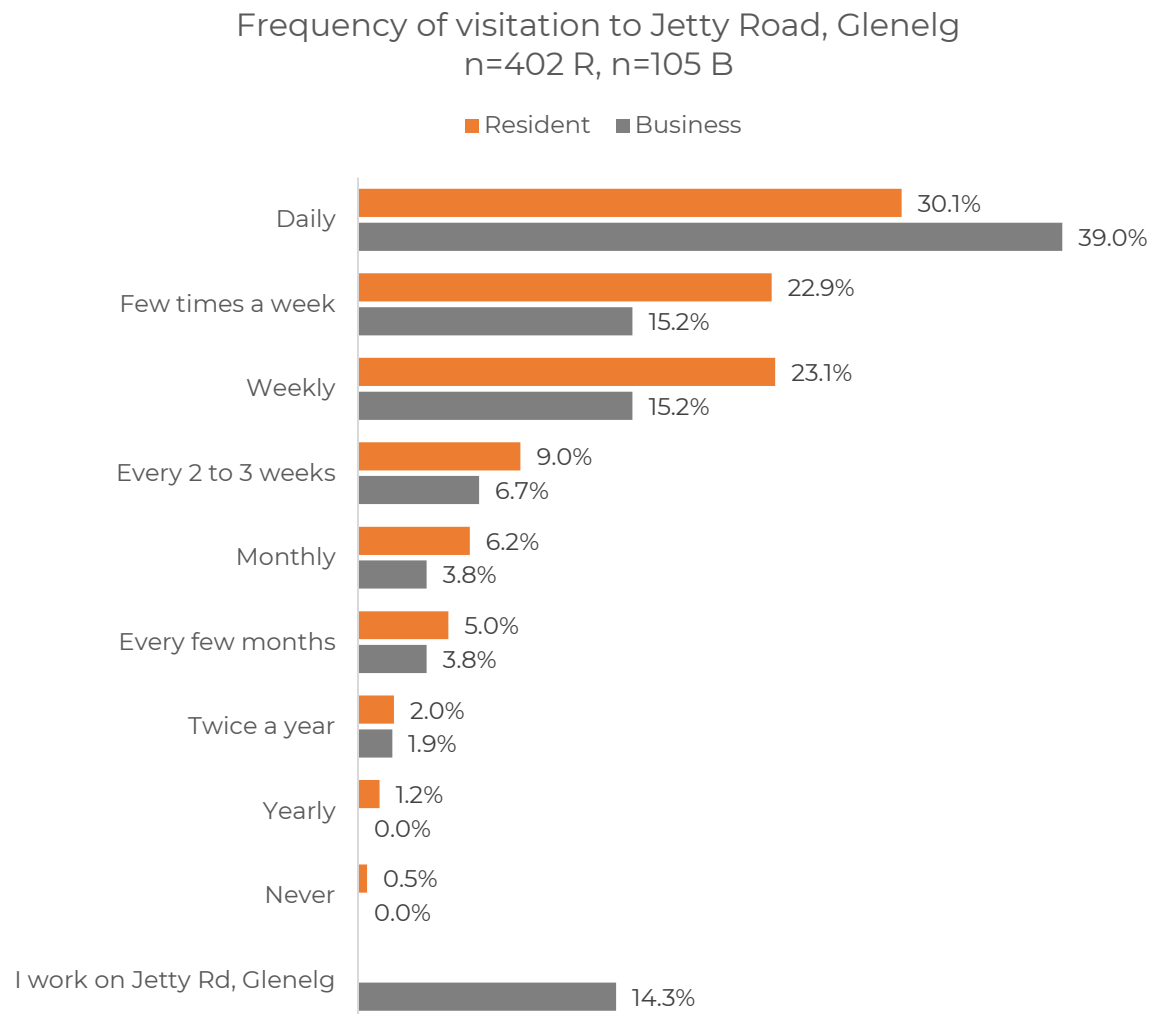


Two thirds of residents and businesses were aware of the Transforming Jetty Road Glenelg Project before they participated in this survey.

Those residents more likely to have been aware are those living in Glenelg, those who have lived in the City of Holdfast Bay for more than 20 years, retirees, those earning less than \$50,000pa and \$150,000+pa and residents aged 55-74 years.

Those businesses more likely to have been aware are those operating in Glenelg and Glenelg South, those businesses that have operated for 5-10 years and 20+ years, those employing one person and 20-49 people, those businesses with \$1-\$2 million turnover and \$5million+ turnover, and those in retail, rental, hiring and real estate, wholesale, and construction.

Q7: How often do you visit Jetty Road, Glenelg?
(Business survey Q5. How often do you visit Jetty Road, Glenelg?)



There is very high visitation to Jetty Road Glenelg with 76% of the residents surveyed visiting weekly or more often compared to 69% of businesses. Of businesses there were another 14% that work on Jetty Road Glenelg taking the total visitation for businesses to 84%.

Q8: You stated that you only visit monthly or less often, why don't you visit Jetty Road, Glenelg more often?

(Business survey Q6. You stated that you only visit monthly or less often, why don't you visit Jetty Road, Glenelg more often?)

There was a total of 70 responses to this question and we have grouped common themes as follows:

Resident responses

- Other areas are better / easier (19 comments)
- No interest / lacks attractiveness (18 comments)
- Parking / traffic issues (15 comments)
- Shop selections (10 comments)
- Too crowded (4 comments)
- Other (4 comments)

Other responses included:

- Only when I have visitors
- Too many homeless people
- Too dumpy
- Too touristy

Business responses (n=10)

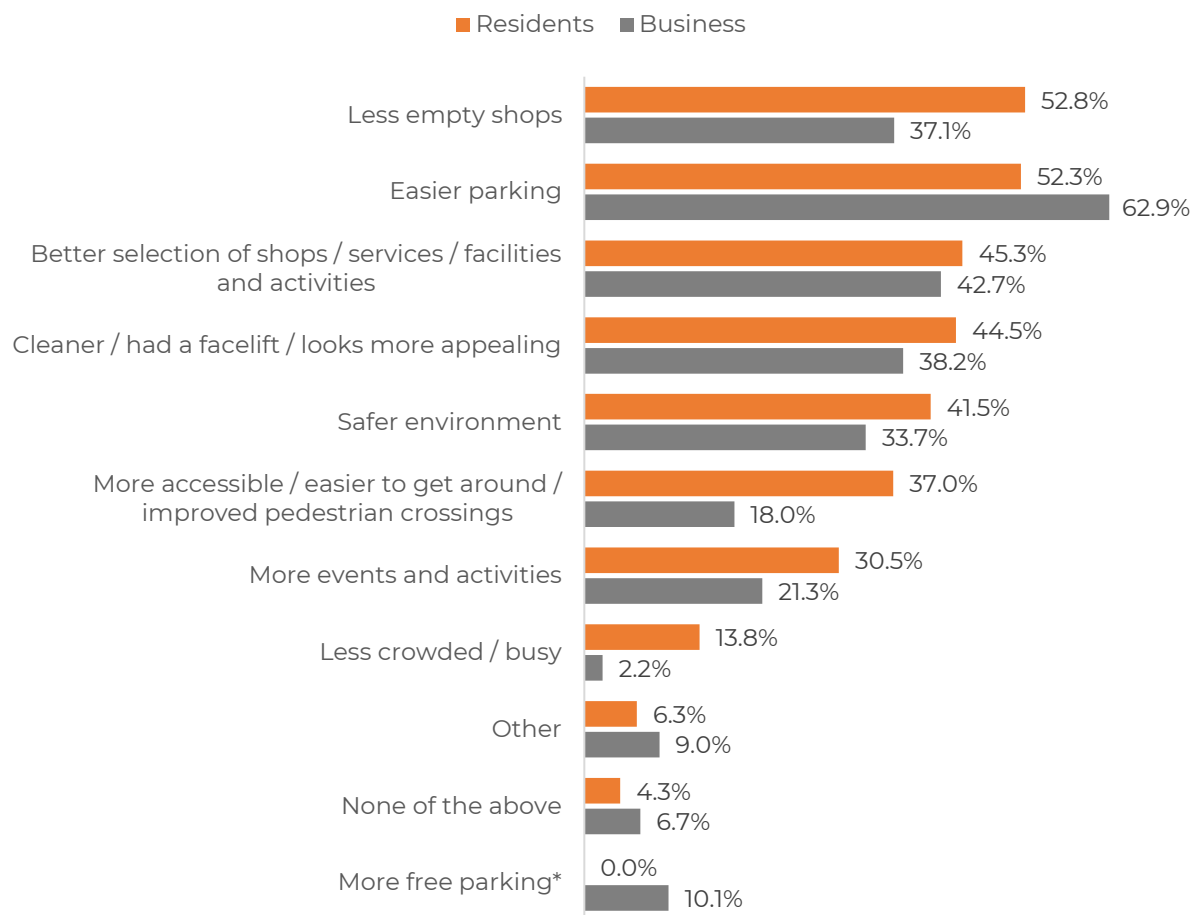
- Better shops
- I previously worked and lived in Glenelg. I went to Jetty Road almost daily. Now I live further South and it is more convenient to go to Jetty Rd Brighton, plus I prefer the cafes there. I also enjoy the Brighton esplanade for walking.
- I work in the city
- It's too hard to get a park. We need more free parking.
- Marion Westfield and Jetty Road Brighton are closer to me.
- Not interested
- Not interested
- Parking difficult. Banks are not open long enough
- Parking issue and the range of shops along jetty road don't appeal to me
- The rent is too high for quality restaurants. The only places that survive are high turnover chains. I've heard it described as a cultural void

Q9: Which of the following would encourage you to visit more often?
Choose all that apply.

(Business survey Q7. Which of the following would encourage you to visit more often?)

What would encourage you to visit more often?

n=402 R, n=105 B



*More free parking was a theme we picked up from the other options on this question and only from businesses. They see paid parking as a big detractor to visiting Jetty Road, Glenelg.

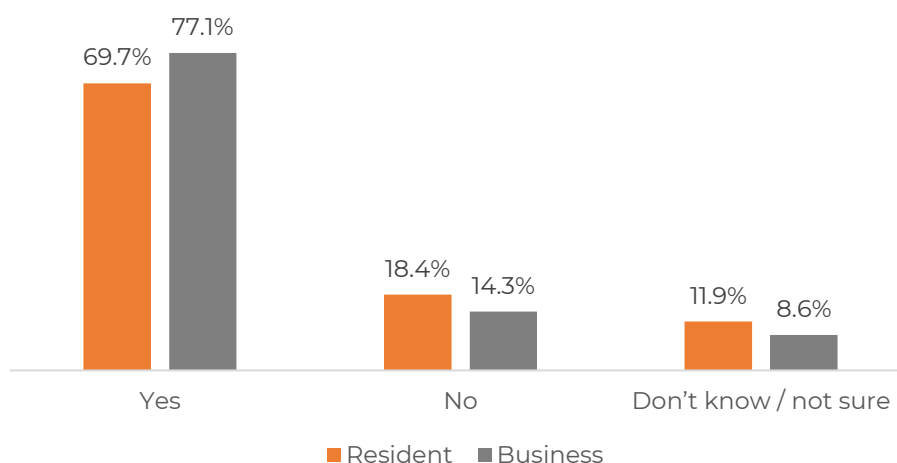
For residents, less empty shops, easier parking, better selection of shops / services, cleaner / had a facelift / looks more appealing, safer, more accessible and more reasons to visit were what would encourage people to visit more.

Less empty shops and better selection of shops / services / facilities and activities was more often nominated by those living in Glenelg, those who have lived in the area for a long time, females, and those aged 18-30 years and 55-64 years. Easier parking was nominated more often by people living in Glenelg South, Brighton, Hove and Kingston Park, those living in the area for 3-4 years and 11-15 years, those in part-time and other employment, females, and those aged 25-54 years. Those who nominated cleaner / had a facelift are those living in Glenelg and Glenelg East and Hove, those who have lived in the area for 3-10 years and 16-20 years,

For business, parking is the big-ticket item, followed by better selection of shops / services, cleaner / had a facelift / looks more appealing, less empty shops and safer were nominated in descending order.

Q10: Do you personally believe that Jetty Road, Glenelg needs an upgrade?
(Business survey Q9. Do you personally believe that Jetty Road, Glenelg needs an upgrade?)

Do you personally believe Jetty Road, Glenelg
needs an upgrade?
n=402 R, n=105 B



Seven in ten residents believe an upgrade is needed to Jetty Road Glenelg and slightly more businesses also agree.

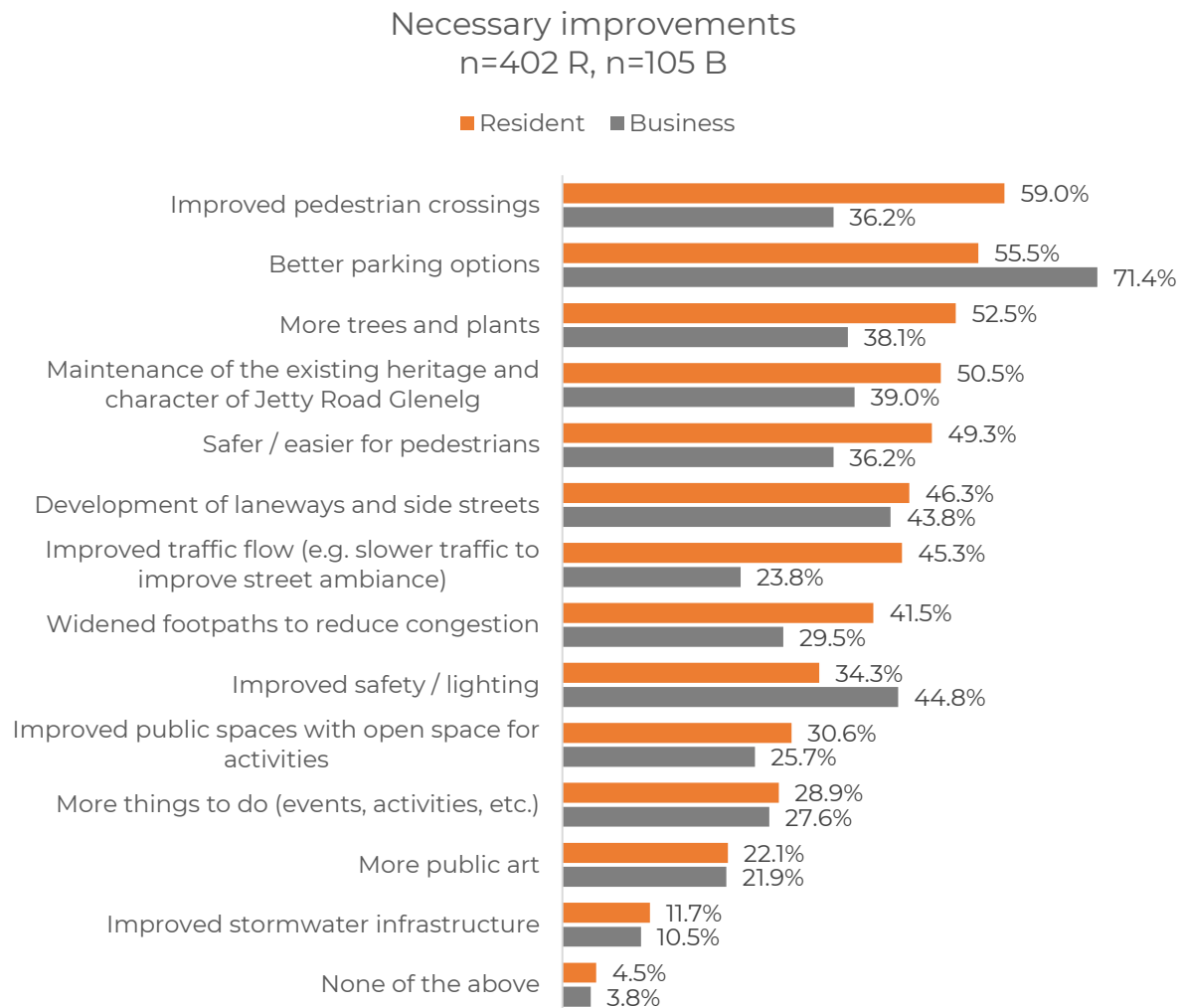
Those residents more likely to think an upgrade is needed are females, those aged 31-54 years, those living in Somerton Park, Glenelg, Glenelg East and North and Hove, those who have lived in the area 3-4 years and 16-20 years, those employed part-time, those on higher incomes of \$100,000+pa.

Those businesses more likely to think an upgrade is needed are those in Somerton Park, South Brighton, Hove and Seacliff, businesses that have been operating for 3-10 years in the area, those employing 20-49 people and \$100+ people, and those in accommodation & food services, construction, rental, hiring and real estate and retail.

The objective of the transformation of Jetty Road is to create a more accessible, attractive, safer mainstreet that is modern, can cater for events and has better pedestrian and traffic flow.

Q11: Which of the following do you think are necessary improvements to Jetty Road, Glenelg? Choose all that apply.

(Business survey Q10. Which of the following do you think are necessary improvements to Jetty Road, Glenelg?)

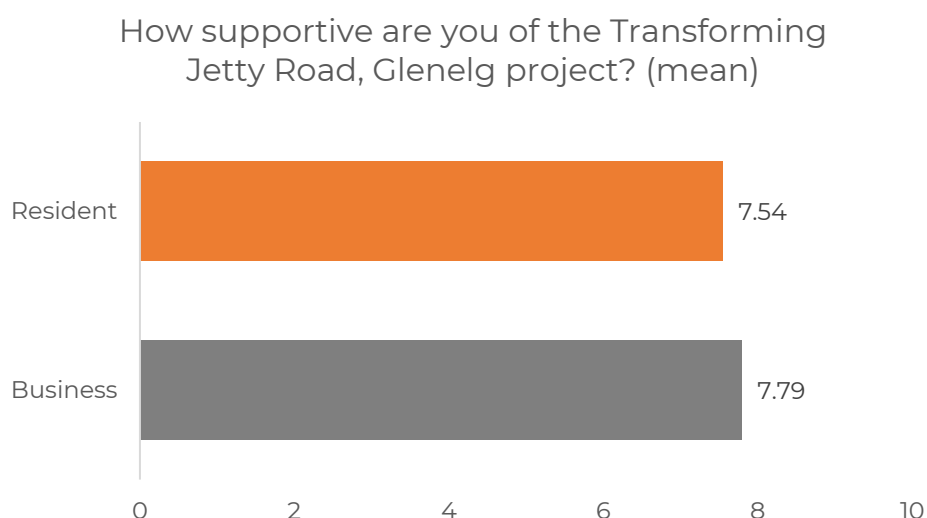


Residents would mostly like to see improved pedestrian crossings, better parking options, more trees and plants, maintenance of the heritage and character of the area, safer / easier for pedestrians, development of laneways and side streets, improved traffic flow and widened footpaths.

In contrast business would mostly would like to see better parking options, improved safety / lighting, more trees and plants, maintenance of heritage and character, development of laneways and side streets, and safer / easier for pedestrians.

Q12: On a scale of 0 to 10, how supportive are you of the Transforming Jetty Road, Glenelg project?

(Business survey Q11. On a scale of 0 to 10, how supportive are you of this Jetty Road, Glenelg project?)



Business is slightly more supportive of the project than residents.

Residents that are above the average in their support are those living in Somerton Park, Glenelg, and Glenelg North, those who have lived in the area for 3-4 years and 16-20 years, those who are employed, high income earners (\$100,000pa+), females, and those aged 18-54 years. Those residents that are below the average in their support tend to be males, those aged 55-64 years and 75+ years, those living in Brighton, and North Brighton, Hove, Kingston Park, and Seacliff, those who have lived in the area 20+ years, retirees and in other employment.

Businesses that are above the average in their support are those operating in Brighton and Hove, those operating for 3-4 years, those employing 20-49 people and 100-199 people, those turning over \$500,000-\$2 million pa, and \$5-10 million pa, in construction, health care and social assistance, manufacturing, professional, scientific and technical services, rental, hiring & real estate services.

Those believe the average in their support are those businesses in Glenelg North and South, those that have operated for 16-20 years, those employing a single person and 50-99 people, those turning over less than \$500,000pa, and \$5-\$10 million, and those in accommodation & food services, arts & recreation, education & training, financial and insurance services, retail, and wholesale trade.

Residents		
Unsupportive	Neutral	Supportive
7.4%	21.8%	70.9%

Businesses		
Unsupportive	Neutral	Supportive
8.3%	12.5%	79.2%

We net promoter scored the results to this question to give a different perspective on the data. Both residents and businesses are more supportive than not.

Residents
NPS +11.9

Businesses
NPS +25.1

Q13: You rated your level of support 7 or higher, why are you supportive?
(Business survey Q12. You rated your level of support 7 or higher, why are you supportive?)

There were 281 people who answered this question. Some responses were multi-faceted so the number of responses below add to more than 281.

Resident responses

- Rundown / needs an upgrade (182 comments)
- Attract more shops / variety (58 comments)
- Safety / remove homeless (45 comments)
- Attract people / tourists / younger people (36 comments)
- Improve traffic flow / parking / pedestrians (34 comments)
- Improve the environment / atmosphere (26 comments)
- More events / activities (16 comments)
- Don't change it / too expensive (8 comments)
- Other (14 comments)

Other responses included:

- As I said previously, Jetty Road can feel quite unsavoury and unsafe. Friends who visit me from interstate say the exact same thing and it causes them to avoid the area. This is the main thing I feel needs to change to improve the outlook of the area. Jetty road is also incredibly tourist focused and centric. While I am aware of the merits of this, I also feel more needs to be done for those of us that live here permanently.
- As long as budget was reasonable
- Glenelg is losing its charm. If we can maintain what heritage, we have got. & the upgrade is in keeping with the old charm of Jetty Rd.
- Having lived in Glenelg and growing up in the area it has changed a lot. It is generally not a safe place at night and during the day incidents that have my children asking questions is of concern. The upgrade should include a demand for permanent police presence. Why Henley has it and Glenelg doesn't is incredulous. We have the highest number of alcohol facilities outside of the CBD with direct public transport too. We are one of the most frequented tourist destinations and now also have numerous halfway houses and yet no permanent police. No wonder we can generate high end shops / businesses when the place is just not attractive

You need only look to Henley and King William Road to understand what Glenelg should be like... Businesses should be incentivised to come and set up here. The locals love it here but now prefer to go towards Broadway to avoid the fairly ordinary atmosphere and behaviour of those loitering around.

- I like to walk down to up on Jetty Road
- Improvement more trees & lighting. From the buffalo to the bridge a safety rail lower enough for kids to prevent from falling onto the rocks around the Patawalonga.
- Improving traffic necessary everywhere in this council
- It's a great opportunity to be more fun for younger people, right now I end up going down to Marion with my mates, but I'd rather go to Jetty Road.
- It's something to have to be done, but I think the council is unlikely to get it right
- Jetty Road is becoming very tired, it needs an uplift, modernize it. The time frame of projects I have noticed has been very SLOW & the business can't afford to be out of action. Need to be moving a little faster these projects.
- Jetty Road is feeling old and tired so definitely feel like it needs some TLC. We love living here and it would definitely make it more comfortable for residents and visitors. We feel a little embarrassed at times that this is the preeminent beach location for visitors and it's so run down!
- Jetty Road is looking very tired & run down. It currently has a bad vibe. Too many empty shops due to landlords too greedy with rents. They'd rather the shops be empty for a few years. It feels unsafe at night. Need more variety with shops.
- My concern is who is making the decision. Who made the decision regarding the awful squid. Decision that would positively to the outcomes / not just decisions. Safety is a big concern with aboriginal & homeless.
- We need more seating on the Jetty lots more. I think there is only a couple & seats with backs. More greenery. I think heritage light poles like a goose neck would look nice down Jetty Rd. Pop up ice cream van would be good for kids on the Jetty. I really think that wouldn't cost much. The pioneer memorial for Governor Hindmarsh. The wording is in correct & it needs an explanatory plaque. The wording about the first settlers is in correct. These were the first European settlers.

There were 76 people who answered this question. Some responses were multi-faceted so the number of responses below add to more than 76.

Business responses

- Needs a facelift / needs change (50 comments)
- Bring in visitors / tourists (25 comments)
- Fill empty shops / variety / support businesses (24 comments)
- Looking dirty / rundown (18 comments)
- Enhanced experience / atmosphere (13 comments)
- Improve traffic flow / parking (9 comments)
- Improve safety (7 comments)
- Will be a positive for all (5 comments)
- Other (9 comments)

Other comments included:

- Because something needs to be done to clean up and modernise the area. And too many traders have messy storefronts. Where's their pride and professionalism?!

- Councils that are investing in their infrastructure are seeing an increase in both visitors and their spending. We need a council that encourages landlord and business owners to invest in their properties and businesses.
- Glenelg is or was the #1 tourist destination for SA. it should reflect that with lots of things to do and see and food and areas to eat and kid play. the jetty needs a massive overhaul to reflect modern tourism
- Glenelg needs to be and should be the beach jewel of Adelaide, and I believe this project will help us achieve that
- Having been a vendor for 15 years and firsthand experiencing the state of the storm water and infrastructure, I believe it's in all our best interest to at least fix this issue. Our stores get flooded, damaging the buildings, which in the long-term increase running costs and our prices unnecessarily. From an aesthetic point of view, the street needs prettying up in order to leave a better impression, so people want to come back. It is Glenelg after all, the most known suburb of Adelaide when it comes to tourism. And it does look a bit shabby. Improving the street will in turn attract other vendors thus creating a unique beachside boutique feel- rather than empty shops. Change is good- even at a cost. It's moving forward.
- It is so overdue. The detail on the announcement was extremely vague however. What is the 40mil going towards? How is it going to enhance the local economy and small business?
- It needs a refresh as long as it doesn't cost rate payers more
- the street is old and must be upgraded. it is important that on street accessible parking is maintained and council must be transparent about what they are doing.
- Whilst I believe Jetty Rd will benefit from a facelift and more events/activities, I don't believe it will benefit my business (Threefold Distilling). Jetty Rd needs better shops and cafes to draw people to the area.

Q14: You rated your level of support 6 or lower, why are you not supportive?
(Business survey Q13. You rated your level of support 6 or lower, why are you not supportive?)

There were 114 people who answered this question. Some responses were multi-faceted so the number of responses below add to more than 114.

Resident responses

- Happy with current state / not necessary (35 comments)
- Needs clean / smaller upgrade (15 comments)
- Rates too high / cost of living (15 comments)
- Spend on other projects (14 comments)
- Too expensive / already spent a lot (13 comments)
- Doesn't benefit me / rarely go (12 comments)
- Improve traffic flow / parking (7 comments)
- Need more information (7 comments)
- Focus on other suburbs (6 comments)
- Other (11 comments)

Other comments included:

There were 20 businesses who answered this question. Some responses were multi-faceted so the number of responses below add to more than 20.

Business responses (n=20)

- as a business owner, we do not want to deter customers from shopping at the bay. need to remember that activities and widening footpaths should only occur e.g.: Moseley area (or close too)-hope this does not bring back the profound impact of the tram line re-build to traders financially!!
- Because it is short sighted and one dimensional. Until the landlords work together with the council to attract a quality mix of tenants - the perception of JR won't change. Unfortunately, wider footpaths won't help with this, it is a bigger picture issue. The street is unsafe, the mix of tenants is not good, and the marketing is focussed on the same 5 food / hospitality operators
- Do not think that amount of money needs to be spent on Jetty Road Glenelg. Fix the empty shops first I think landlords need to lower rent so businesses can thrive in the area.
- Doesn't affect business
- Doesn't need it
- Doesn't really need it. Sped money in other areas
- Governments at all levels should keep out of business. Let the market sort itself out. The age of the retail strip is dead. People shop more online and greedy landlords charge too much rent to tenants on Jetty Road to sustain and encourage retail activity. The economy is tanking due to Government induced higher inflation. Parking is a big issue but 'upgrades' I have noticed lead to even less street parking. This is just another 'green' led initiative to reduce the number of cars and condition us to a '15-minute City'. The WEF and the UN are corrupt Satanic organisations and anything that they put forward is not to benefit humankind - only enslave us. And as for funding this Jetty Road upgrade by increasing the rates of all other businesses in the Holdfast Council catchment - OUTRAGEOUS AND CRIMINAL. Stick to keeping the place clean and fixing the roads and footpaths. This project is a complete waste of time and money. Stop the madness now.
- I am supportive but see contradictions. The money should be towards the police station 24hrs. Safety for residents. Homeless people re housed instead of sleeping in Jetty Rd. 2 Real estate agents have recently had people with mental problems attack inside their offices with one death. There will be more problems in Maturin Rd with the drug rehab centre. Older people now don't feel safe in Glenelg, no matter how much you beautify it. Tram is not safe anymore with drunk and drugged people. Last night 4/5 at 9.00pm on the tram home, 5 security people trying to calm some drunk agro's almost all the way. Not a good look and most uncomfortable for locals and visitors. A lot of older
- I don't think it will improve the businesses in the area as most people are made to leave the area because of the 1-hour parking. We need less parking restrictions to encourage people to visit the area. Drainage in Moseley Street needs to be improved even with a very light rain the drain fills up to 200mm in water and people can't get out of the cars due to the flooding sometimes it goes over the footpath and into our premises. There is no drains and I have asked several times, but nothing is done.
- I'm supportive of change that is actually necessary and helpful to business owners and our customers. Don't bother wasting council funds on putting in more 'public art' like the atrocious eyesore between the church and sports girl when we need ACTUAL items addressed including public safety and cleanliness. We have held countless meetings/agendas/surveys where we have voiced our concerns about the decline in safety over the past DECADE now. We need ACTION, clean up jetty road, protect businesses and customers from violence and public disturbances from drug and alcohol affected individuals and groups. Enough is enough operation Jericho has not been successful at preventing individuals and groups of people from filling our walkways and seating areas with alcohol

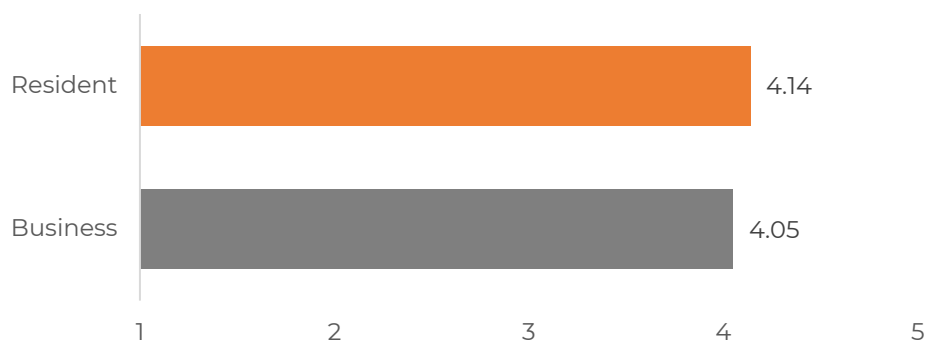
bottles, bodily waste, and constant fights particularly during summer. I'll give you a 10 if you can solve the issues, we've been raising for years but for now I'm apprehensive because change has not happened.

- Instead of doing any upgrade, I think we should make it a safer and more attractive place first. I don't see too much energy going around the neighbourhood. And the public car park was pretty scary after dark. The business are limited with advertising because nothing was permitted.
- Need to see details first
- Not affected by it
- Not confident that it will benefit the whole street. The beach end seems to get ALL attention. Not that excited to get drainage and paving. Very concerned that the first stage will affect access to my business, especially during winter.
- Not during a cost-of-living crisis. Too much money spent on it.
- Not improving safety or parking
- So many issues on Jetty Road centre around thee less than safe atmosphere that has perpetuated over the past few years. As a night destination the lighting is woeful and should be made uniform, bright and always on when dark under the store verandas.
- So much money spent on the dripping pink thing as artwork could go towards better options such as seating along the shopping area and better signage for side street vendors.
- There is more necessary thing to upgrade at jetty road than the proposed project, facelift whole street not only the Mosley square
- You throw a bucket of money at redeveloping Jetty Road, and this means the landlords will jack the rent up again. Most of the businesses can't afford the rent as it currently is which is why the shops are so bad now.

Q15: If the upgrade is completed, how likely are you to visit Jetty Road, Glenelg more often?

(Business survey Q14, If the upgrade is completed, how likely are you to visit Jetty Road, Glenelg more often?)

If the upgrade is completed, how likely are you to visit Jetty Road, Glenelg more often?



Residents		
Not likely	Neutral	Likely
7.5%	18.9%	73.6%

Businesses		
Not likely	Neutral	Likely
7.3%	14.6%	78.1%

Residents are slightly more likely to visit Jetty Road Glenelg more often post an upgrade than businesses.

Those more likely than the average to visit more often are females, those aged 18-54 years, and those living in Somerton Park, Glenelg (all including East, North and South), those who are part-time employed and in other employment and high-income earners (earning \$100,000pa+). Those more likely to visit less than the average are males, those aged 75+ years, retirees, those who have lived in the area for more than 20 years, and those from Brighton (North and South), Hove, Kingston Park, Seacliff and Seacliff Park.

Q16: Council is proposing an increase to rates of 2.3% (\$41 for the average household) next year to **specifically** fund this project.

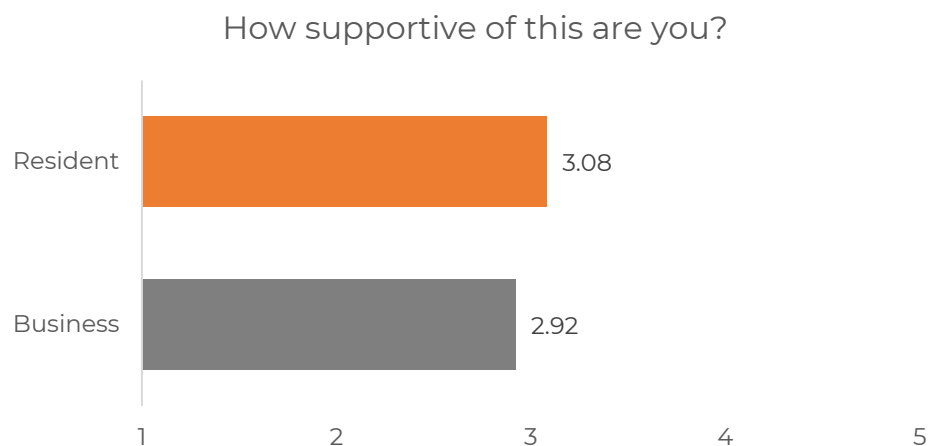
Council anticipates an increase at this similar level for two more years to fund the Jetty Road project. How supportive are you of this?

Please note that this proposed rate increase would be in addition to annual rate increases aligned with Adelaide CPI which for the next financial year is a proposed 4.8%.

(Business survey Q15. Council is proposing an increase to rates of 2.3% next year to **specifically** fund this project.)

Council anticipates an increase at this similar level for two more years to fund the Jetty Road project. How supportive are you of this?

Please note that this proposed rate increase would be in addition to annual rate increases aligned with Adelaide CPI which for the next financial year is a proposed 4.8%.)



Residents are slightly more likely to support this initiative even if it costs them 2.3% in increases to their rates compared to businesses. Combining both residents and businesses to increase the sample size to 505, 47% of all people surveyed are supportive versus 37% who are not supportive.

Those residents more supportive than the average are aged 18-54 years, high income earners (earning more than \$100,000+pa), those who have lived in the area for less than 4 years, and those who live in Somerton Park, Glenelg, Glenelg North, and Glenelg South. Those residents who are more unsupportive than the average are aged 55+ years, low income earners (less than \$50,000pa), those who have lived in the area for 11-15 years and more than 20 years, and those living in Brighton, North Brighton, Hove, Kingston Park, Seacliff and Seacliff Park.

Those businesses that are more supportive than the average are Glenelg and Brighton businesses, those who have operated in the area for less than 4 years, and 11-15 years, businesses with 1 employee or 50 -99, those businesses with a turnover of less than \$2 million pa, and \$5 million +pa, and those in professional, scientific, and technical services and rental, hiring and real estate services. Those businesses that are more unsupportive than the average are businesses in Somerton Park, Glenelg East, North and South, North Brighton, and Hove, those who have operated for 5-10 years and 16-20 years, those employing 20-49 people and 100-199, and those in accommodation & food services, retail and wholesale trade, arts & recreation services, and education & training.

Residents		
Unsupportive	Neutral	Supportive

36.8%	13.9%	49.2%
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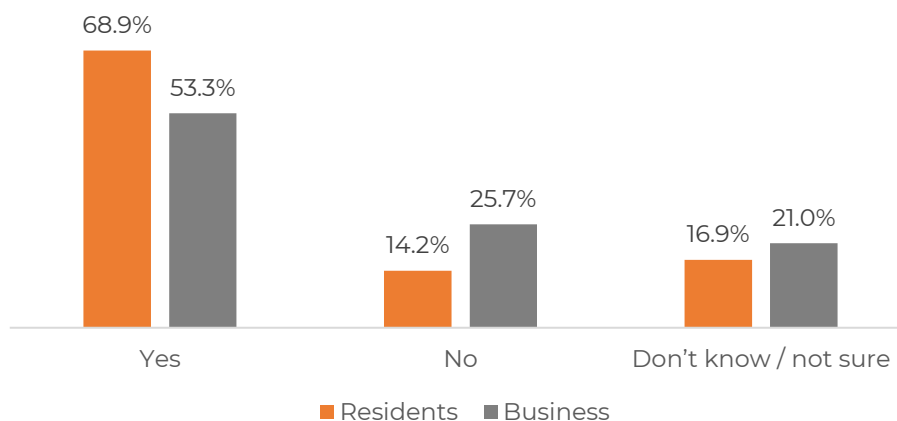
Businesses		
Unsupportive	Neutral	Supportive
38.1%	24.8%	37.1%

Combined total		
Unsupportive	Neutral	Supportive
37.1%	16.2%	46.7%

Q17: Thinking long term, do you see this upgrade as a benefit to all residents living in the City of Holdfast Bay?

(Business survey Q17. Thinking long term, do you see this upgrade as a benefit to all businesses operating in the City of Holdfast Bay?)

Do you see this upgrade as a benefit to all residents living in the City of Holdfast Bay?



Significantly more residents than businesses see this upgrade as a benefit to all residents living in the area.

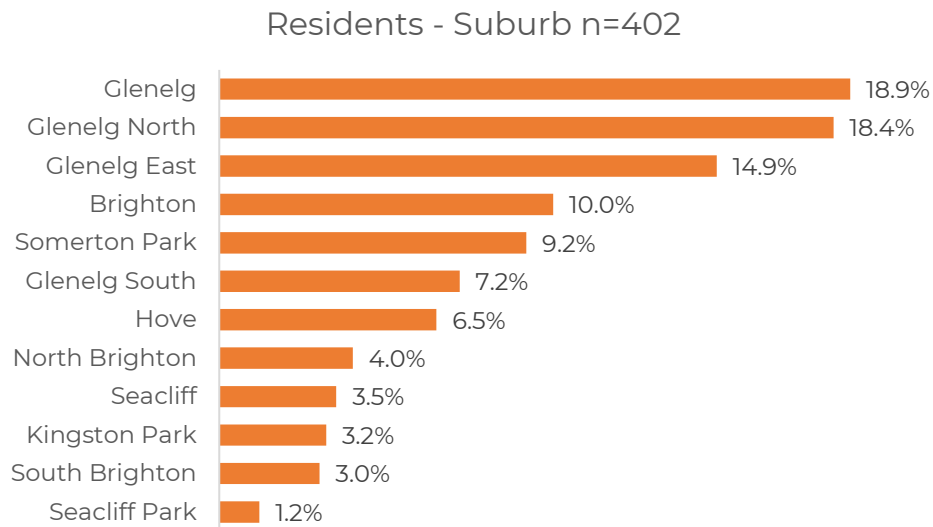
Those residents more likely to think there is a long-term benefit are females, those aged 25-54 years, those who are employed full or part-time, high-income earners (earning \$100,000pa+), and those living in Somerton Park, Glenelg, and Glenelg East.

Those businesses more likely to think there is a long-term benefit for residents are those operating in Glenelg and Brighton, those businesses that have operated for less than 10 years in the area,

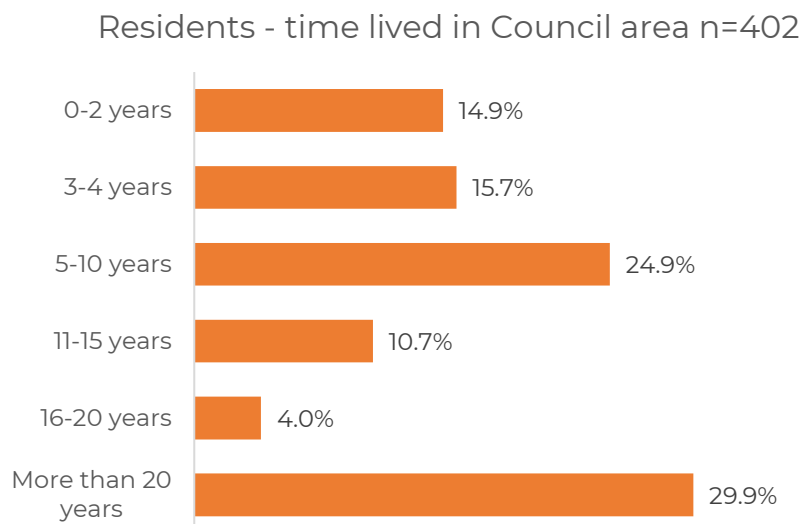
businesses that employ one person and 20-99 people, those with turnovers of \$1-\$2 million pa, and \$10million+pa, and those in construction, manufacturing, and rental, hiring and real estate services.

Resident demographics

Q4: Which suburb do you live in?

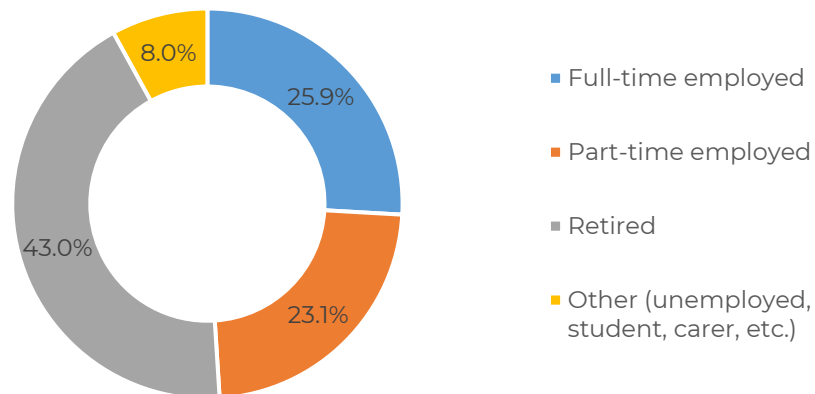


Q5: How long have you lived in the City of Holdfast Bay?



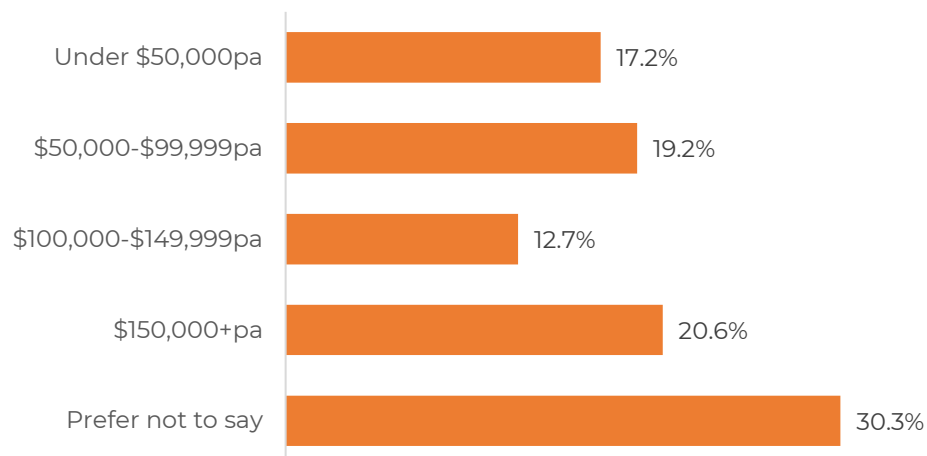
Q18: Which of the following best represents your employment status?

Resident employment status n=402



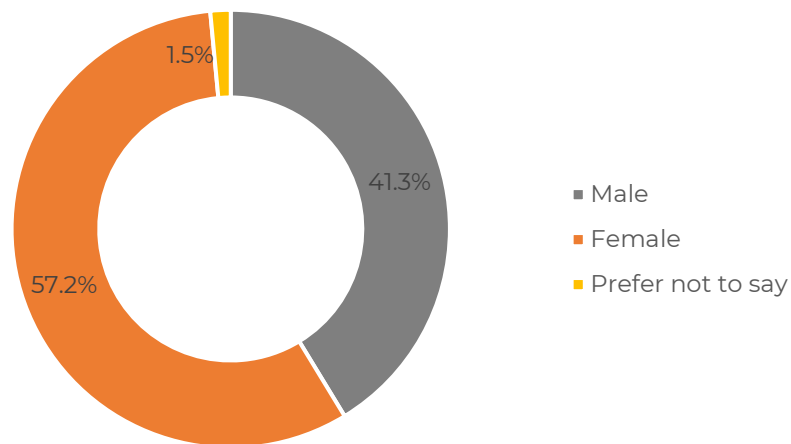
Q19: What is your gross household income?

Residents - Household income n=402



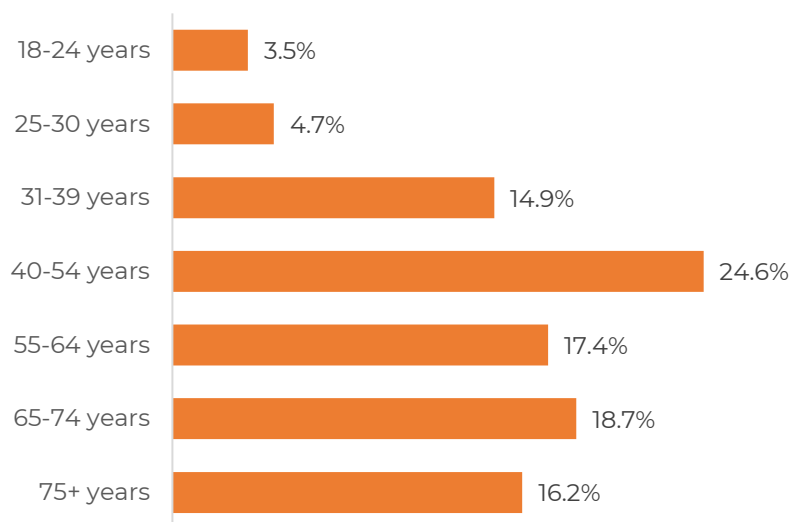
Q20: What is your gender?

Residents - Gender n=402



Q21: In which age bracket do you belong?

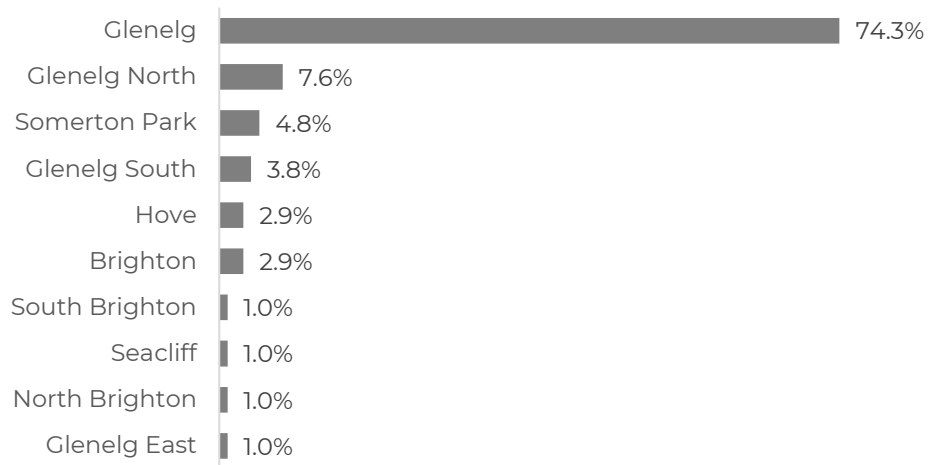
Residents - Age n=402



Business demographics

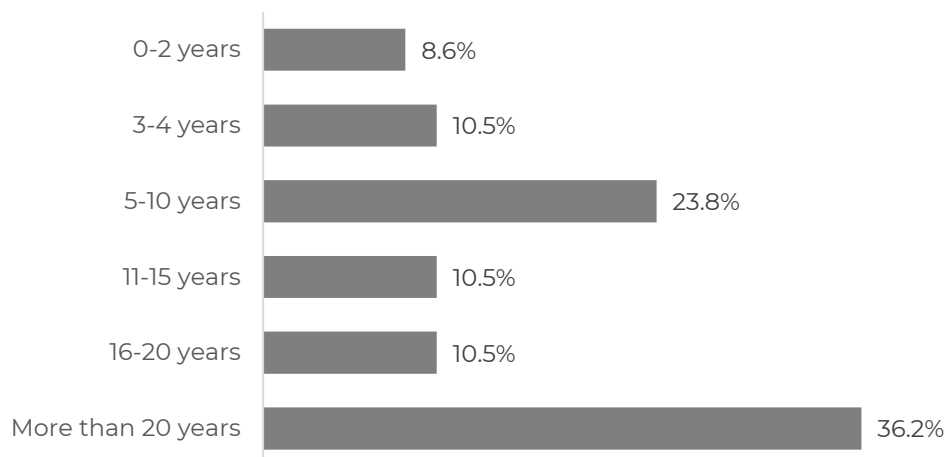
Q2: Which suburb does your main business operate from?

Businesses - Suburb n=105



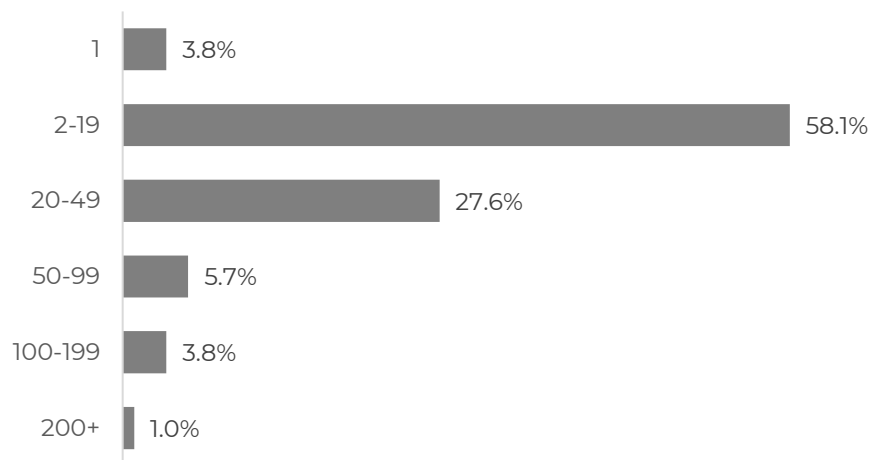
Q3: How long have you been in business in the City of Holdfast Bay?

Business - length of operation n=105



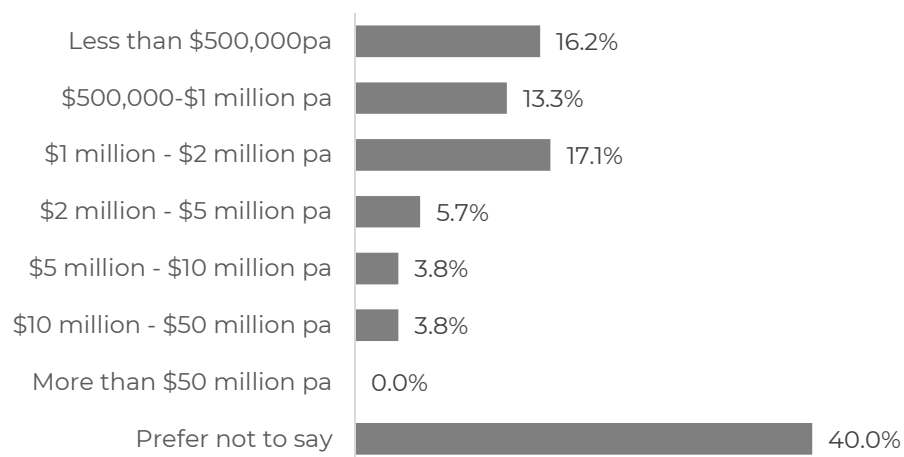
Q17: How many people (including management and owners) does your business employ?

Business - size by employment n=105



Q18: What is your annual turnover range?

Business - size by employment n=105



Q19: What industry sector do you fall into? Please choose all that apply.

Businesses - Industry sector n=105



5. Resident Survey - Questionnaire

Hello, my name is _____, from Intuito Market Research.

We are conducting a survey among residents of the City of Holdfast Bay for the Council. The survey is about the newly announced project to transform Jetty Road, Glenelg that is due to start later this year and continue over the next three years in a staged approach.

The Transforming Jetty Road, Glenelg project will deliver a modern, safe and vibrant coastal shopping, dining and entertainment precinct which caters to the needs of the local community while offering visitors to the Bay a world-class tourism and events destination. The redevelopment will cost a total of \$40 million. The Australian Government has committed \$10 million towards it and Council will be required to fund the balance. We would like your views on the redevelopment.

The survey should only take around 5 minutes to complete and we thank you in advance for your time.

Please note your responses will be 100% anonymous and confidential. Intuito Market Research abides by The Research Society's Privacy Code for Market and Social Research. All data gathered will be treated with the strictest confidentiality and will only be used for research purposes. Intuito is a member of The Research Society and works to the highest privacy standards.

Screeners:

Q1: Are you aged over 18?

- ☐ Yes
- ☐ No (cease interview)

Q2: Do you live in the City of Holdfast Bay? (Single response.)

- ☐ I am a resident
- ☐ I am a resident and a business owner both in the City of Holdfast Bay
- ☐ I am neither (cease interview)

Q3: Are you or your household ratepayers? (Single response.)

- ☐ Yes
- ☐ No, I rent
- ☐ Don't know / not sure

Q4: Which suburb do you live in? (Single response.)

- ☐ Brighton
- ☐ North Brighton
- ☐ South Brighton
- ☐ Glenelg
- ☐ Glenelg East
- ☐ Glenelg North
- ☐ Glenelg South
- ☐ Hove
- ☐ Kingston Park
- ☐ Seacliff
- ☐ Seacliff Park
- ☐ Somerton Park

Q5: How long have you lived in the City of Holdfast Bay? (Single response.)

- ☐ 0-2 years
- ☐ 3-4 years
- ☐ 5-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ More than 20 years

Q6: Were you aware before now that this upgrade had been announced? (Single response.)

- ☐ Yes
- ☐ No
- ☐ Don't know / not sure

Q7: How often do you visit Jetty Road, Glenelg? (Single response.)

- ☐ Daily (go to Q9)
- ☐ Few times a week (go to Q9)
- ☐ Weekly (go to Q9)
- ☐ Every 2 to 3 weeks (go to Q9)
- ☐ Monthly (go to Q8)
- ☐ Every few months (go to Q8)
- ☐ Twice a year (go to Q8)
- ☐ Yearly (go to Q8)
- ☐ Never (go to Q8)

Q8: You stated that you only visit monthly or less often, why don't you visit Jetty Road, Glenelg more often?

Q9: Which of the following would encourage you to visit more often? Choose all that apply. (Multiple response, randomised)

- ☐ Cleaner / had a facelift / looks more appealing
- ☐ Better selection of shops / services / facilities and activities
- ☐ Less empty shops
- ☐ Easier parking
- ☐ Safer environment
- ☐ More accessible / easier to get around / improved pedestrian crossings
- ☐ Less crowded / busy
- ☐ More events and activities
- ☐ Other (please specify) _____

Q10: Do you personally believe that Jetty Road, Glenelg needs an upgrade? (Single response.)

- ☐ Yes
- ☐ No

-
- Don't know / not sure

The objective of the transformation of Jetty Road is to create a more accessible, attractive, safer mainstreet that is modern, can cater for events and has better pedestrian and traffic flow.

Q11: Which of the following do you think are necessary improvements to Jetty Road, Glenelg? Choose all that apply. (Multiple response, randomised)

- ☐ Safer / easier for pedestrians
- ☐ Improved pedestrian crossings
- ☐ Widened footpaths to reduce congestion
- ☐ Improved traffic flow (e.g. slower traffic to improve street ambiance)
- ☐ Improved safety / lighting
- ☐ Improved public spaces with open space for activities
- ☐ More trees and plants
- ☐ More public art
- ☐ Better parking options
- ☐ Development of laneways and side streets
- ☐ Maintenance of the existing heritage and character of Jetty Road Glenelg
- ☐ More things to do (events, activities, etc.)
- ☐ Improved stormwater infrastructure
- ☐ None of the above

Q12: On a scale of 0 to 10, how supportive are you of the Transforming Jetty Road, Glenelg project?

Not supportive at all

0 1 2 3 4 5 6 7 8 9 10 D/K

Extremely supportive

Q13: You rated your level of support 7 or higher, why are you supportive?
Open ended.

Q14: You rated your level of support 6 or lower, why are you not supportive?
Open ended.

Q15: If the upgrade is completed, how likely are you to visit Jetty Road, Glenelg more often? (Single response.)

- Extremely likely
- Somewhat likely
- Neither likely nor unlikely
- Somewhat unlikely
- Extremely unlikely

Q16: Council is proposing an increase to rates of 2.3% (\$41 for the average household) next year to **specifically** fund this project.

Council anticipates an increase at this similar level for two more years to fund the Jetty Road project. How supportive are you of this? (Single response.)

Please note that this proposed rate increase would be in addition to annual rate increases aligned with Adelaide CPI which for the next financial year is a proposed 4.8%.

- ☐ Extremely supportive
- ☐ Somewhat supportive
- ☐ Neither supportive nor unsupportive
- ☐ Somewhat unsupportive
- ☐ Extremely unsupportive

Q17: Thinking long term, do you see this upgrade as a benefit to all residents living in the City of Holdfast Bay? (Single response.)

- ☐ Yes
- ☐ No
- ☐ Don't know / not sure

Demographics

And now some questions about you to help us understand the cross-section of people in our sample.

Q18: Which of the following best represents your employment status? (Single response.)

- ☐ Full-time employed
- ☐ Part-time employed
- ☐ Retired
- ☐ Other (unemployed, student, carer, etc.)

Q19: What is your gross household income? (Single response.)

- ☐ Under \$50,000pa
- ☐ \$50,000-\$99,999pa
- ☐ \$100,000-\$149,999pa
- ☐ \$150,000+pa
- ☐ Prefer not to say

Q20: What is your gender? (Single response.)

- ☐ Male
- ☐ Female
- ☐ Non-binary
- ☐ Prefer not to say

Q21: In which age bracket do you belong? (Single response.)

- ☐ 18-24 years
- ☐ 25-30 years
- ☐ 31-39 years
- ☐ 40-54 years
- ☐ 55-64 years

-
- 64-75 years
 - 75+ years

Thank you for completing this survey with us today.

6. Business Survey - Questionnaire

We are conducting a survey among businesses of the City of Holdfast Bay for the Council. The survey is about the newly announced project to transform Jetty Road, Glenelg that is due to start later this year and continue over the next three years in a staged approach.

The Transforming Jetty Road, Glenelg project will deliver a modern, safe and vibrant coastal shopping, dining and entertainment precinct which caters to the needs of the local community while offering visitors to the Bay a world-class tourism and events destination. The redevelopment will cost a total of \$40 million. The Australian Government has committed \$10 million towards it and Council will be required to fund the balance. We would like your views on the redevelopment.

The survey should only take around 5 minutes to complete and we thank you in advance for your time.

Please note your responses will be 100% anonymous and confidential. Intuito Market Research abides by The Research Society's Privacy Code for Market and Social Research. All data gathered will be treated with the strictest confidentiality and will only be used for research purposes. Intuito is a member of The Research Society and works to the highest privacy standards.

Screeners:

Q1: Are you a business owner in the City of Holdfast Bay? (Single response)

- I am a business owner of a City of Holdfast Bay business?
- I am a resident and a business owner both in the City of Holdfast Bay.
- I work for a business in the City of Holdfast Bay.
- I am not associated with a business in the City of Holdfast Bay.

Q2: Which suburb does your main business operate from? (Single response)

- Brighton
- North Brighton
- South Brighton
- Glenelg
- Glenelg East
- Glenelg North
- Glenelg South
- Hove
- Kingston Park
- Seacliff
- Seacliff Park
- Somerton Park

Q3: How long have you been in business in the City of Holdfast Bay? (Single response)

- 0-2 years
- 3-4 years
- 5-10 years
- 11-15 years
- 16-20 years

-
- More than 20 years

Q4: Were you aware before now that this up-grade had been announced?
(Single response)

- Yes
- No
- Don't know / not sure

Q5: How often would you visit Jetty Road, Glenelg? (Single response)

- Daily (go to Q7)
- Few times a week (go to Q7)
- Weekly (go to Q7)
- Every 2 to 3 weeks (go to Q7)
- Monthly (go to Q6)
- Every few months (go to Q6)
- Twice a year (go to Q6)
- Yearly (go to Q6)
- Never (go to Q6)
- I work on Jetty Road (go to Q8)

Q6: Why don't you visit Jetty Road, Glenelg more often?

Q7: Which of the following would encourage you to visit more often?
Choose all that apply. (Multiple response, randomised)

- ☐ Cleaner / had a facelift / looks more appealing
- ☐ Better selection of shops / services / facilities and activities
- ☐ Less empty shops
- ☐ Easier parking
- ☐ Safer environment
- ☐ More accessible / easier to get around / improved pedestrian crossings
- ☐ Less crowded / busy
- ☐ More events and activities
- ☐ Other (please specify) _____

Q8: Which of the following do you think would encourage people to visit more often? Choose all that apply. (Multiple response, randomised)

- ☐ Cleaner / had a facelift / looks more appealing
- ☐ Better selection of shops / services / facilities and activities
- ☐ Less empty shops
- ☐ Easier parking
- ☐ Safer environment
- ☐ More accessible / easier to get around / improved pedestrian crossings
- ☐ Less crowded / busy
- ☐ More events and activities

☐ Other (please specify) _____

Q9: Do you personally believe that Jetty Road, Glenelg needs an upgrade?
(Single response)

- Yes
- No
- Don't know / not sure

The objective of the transformation of Jetty Road is to create a more accessible, attractive, safer mainstreet that is modern, can cater for events and has better pedestrian and traffic flow.

Q10: Which of the following do you think are necessary improvements to Jetty Road, Glenelg. Choose all that apply. (Multiple response, randomised)

- ☐ Safer / easier for pedestrians
- ☐ Improved pedestrian crossings
- ☐ Widened footpaths to reduce congestion
- ☐ Improved traffic flow (e.g. slower traffic to improve street ambiance)
- ☐ Improved safety / lighting
- ☐ Improved public spaces with open space for activities
- ☐ More trees and plants
- ☐ More public art
- ☐ Better parking options
- ☐ Development of laneways and side streets
- ☐ Maintenance of the existing heritage and character of Jetty Road Glenelg
- ☐ More things to do (events, activities, etc.)
- ☐ Improved stormwater infrastructure
- ☐ All the above
- ☐ None of the above

Q11: On a scale of 0 to 10, how supportive are you of this Jetty Road, Glenelg project?

Not supportive at all

Extremely supportive

0	1	2	3	4	5	6	7	8	9	10	D/K
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Q12: You rated your level of support 7 or higher, why are you supportive?
Open ended.

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Q13: You rated your level of support 6 or lower, why are you not supportive?
Open ended.

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Q14: If the upgrade is completed, how likely do you think people will visit Jetty Road, Glenelg more often? (Single response)

- ☐ Extremely likely
- ☐ Somewhat likely
- ☐ Neither likely nor unlikely
- ☐ Somewhat unlikely
- ☐ Extremely unlikely
- ☐ I work on Jetty Road Glenelg

Q15: Council is proposing an increase to rates of 2.3% next year to **specifically** fund this project.

Council anticipates an increase at this similar level for two more years to fund the Jetty Road project. How supportive are you of this? (Single response.)

Please note that this proposed rate increase would be in addition to annual rate increases aligned with Adelaide CPI which for the next financial year is a proposed 4.8%.

- ☐ Extremely supportive
- ☐ Somewhat supportive
- ☐ Neither supportive nor unsupportive
- ☐ Somewhat unsupportive
- ☐ Extremely unsupportive

Q16: Thinking long term, do you see this upgrade as a benefit to all businesses operating in the City of Holdfast Bay? (Single response)

- ☐ Yes
- ☐ No
- ☐ Don't know / not sure

Demographics

And now some questions about your business to help us understand the cross-section of businesses in our sample.

Q17: How many people (including management and owners) does your business employ? (Single response)

- ☐ 1
- ☐ 2-19
- ☐ 20-49
- ☐ 50-99
- ☐ 110-199
- ☐ 200+

Q18: What is your annual turnover range? (Single response)

- ☐ Less than \$500,000pa
- ☐ \$500,000-\$1 million pa
- ☐ \$1 million - \$2 million pa
- ☐ \$2 million - \$5 million pa
- ☐ \$5 million - \$10 million pa
- ☐ \$10 million - \$50 million pa

-
- More than \$50 million pa
 - Prefer not to say

Q19: What industry sector do you fall into? Please choose all that apply.

- ☐ Accommodation & food service
- ☐ Administration and support services
- ☐ Arts & recreation services
- ☐ Construction
- ☐ Education & training
- ☐ Electricity, gas, water, or waste services
- ☐ Financial and insurance services
- ☐ Health care and social assistance
- ☐ Information media & telecommunications
- ☐ Manufacturing
- ☐ Professional, scientific & technical services
- ☐ Public administration & safety
- ☐ Rental, hiring & real estate services
- ☐ Retail trade
- ☐ Transport, postage & warehousing
- ☐ Wholesale trade
- ☐ Other (please specify) _____

Thank you for completing our survey today.