

THE ROYAL ADELAIDE HOSPITAL SITE – Targeted Engagement

SUMMARY OF KEY FINDINGS FROM THE MAY 2017 ONLINE SURVEY

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EXECUTIVE SUMMARY

As part of the State Government of South Australia's commitment to transform the old Royal Adelaide site on North Terrace into an international leading mixed-use precinct, Renewal SA undertook a targeted round of engagement with two key groups, being youth and business entrepreneurs to gain more detailed views from these cohorts than was received from the first round of engagement in late 2016.

This report focuses on the engagement findings from the online survey promoted on the Adelaide Riverbank website over a 3 week period in late April/mid-May 2017.

In total, 153 people responded to the survey of 13 questions;

- with more than half being under the age of 35 years;
- almost one third being young professionals; and
- with the majority living and working in the Adelaide CBD or nearby surrounds.

In addition to finding out what currently attracts these target groups to live, work and visit the city, the purpose of the survey was to establish what would encourage these respondents to spend more time in the city in the future and in particular, the old Royal Adelaide site (the site) as a future destination. Comparisons between the views of respondents before and after viewing the fly through of a possible redevelopment scenario for the site were also made.

The main reasons the target groups currently visit the city are for shopping, dining and entertainment. Of those who don't live or work in the city, the most frequent visitors to the city are professionals and students under 35 years of age. Weekend and weeknight visits are most popular times to visit the city.

Respondents identified that more new and free events, cultural events, festivals and markets would be a drawcard in addition to cheaper city parking and improved public transport services and better pedestrian and cyclist access. More entertainment venues, particularly small boutique, exciting indoor, gallery and performance spaces and diverse outdoor spaces were also favoured. Longer opening hours, increasing the city's population and introducing new infrastructure that creates the 'wow' factor and encourages more young people to stay in Adelaide and people of all ages to spend quality time in the city were key suggestions on making the city a more attractive place to visit.

Approximately two thirds of respondents indicated prior to viewing the redevelopment fly through that they would consider living or working in the city in the future. While all professionals and students alike of all ages would consider the city as a future destination, professionals were four to five times more likely to invest or start a business in the city than students.

Following the viewing of the fly through with images and new redevelopment plans for the site, more respondents indicated that they would be attracted to visit the site (79%) than previous consideration given to visiting the city as a future destination (40%). After viewing the fly through, the majority of respondents also stated that they would consider working at the re-developed site. More than half of respondents (66%) would consider or potentially consider living at the re-developed site, while 62% would consider or potentially consider investing in the site and 50% would consider or potentially consider starting a new business at the site.

Most respondents stated that they would consider living at the re-developed site because living in the Adelaide CBD and new development was attractive. Many felt that working and living in the same place would be ideal. Some thought that there would be more to do in the new development, with more cultural events, activities, restaurants, and shopping with longer operating hours creating a vibrant lifestyle. If housing was affordable, a number of people thought that the site would be most attractive to young people, including students.

Those who weren't inclined to consider living in the re-developed site liked where they live now and see no reason for change, don't like high density living or don't want residential development as part of the site. Some were concerned about the affordability of living at the site or thought the development was conservative. A few also didn't feel they had enough details about the accommodation options to make an informed choice.

A number of respondents indicated that they would consider working at the re-developed site because it was likely to attract bigger business and create more job opportunities than where they currently work and could be a vibrant place to work. Of those who didn't think they would consider working at the site, said they were already happy with their current work place and/or worked in close proximity already. A few thought there was a lack of incentive for them to work in the city, stating traffic, expensive parking, and good public transport options as barriers.

The perception of future investment and expansion opportunities in Adelaide were reasons for potentially investing in the site for some, while others felt that investment opportunities were stronger in eastern states and were concerned about the potential over supply of apartments in the city which could make property investment less attractive.

Many respondents stated that they would be keen to visit the newly developed site, excited at the prospect of new, interesting, and exciting blend of spaces and uses with contemporary art buildings and performance space, heritage buildings, open space, restaurants, shops, and event spaces all adding to the vibrancy of the location.

Of the small numbers that didn't want to visit the site, they did not support the commercial or residential development, preferring the site to be used more for open space. Some were not inspired by the architecture in the imagined scenario of the fly through and believed the development was conservative, not unique, or exciting.

Starting a business was not on the scale for most. Of the small percentage that said they would consider starting a business at the re-developed site, they felt expansion and development of the Adelaide CBD is promising for small business. Those who were reluctant to start a business at the site, either had no interest in such things or were concerned that businesses are currently moving out of the Adelaide CBD and would not be profitable.

Retention of the facades of old buildings, particularly on Frome Road, including a MONA style modern art gallery, event spaces and a mix of green space, affordable housing, good pedestrian and cyclist access, public transport options and 24/7 activity were identified as inviting elements for the re-developed site.

There was mixed opinion about the residential development with some open to the proposed hotel and apartments, while others were not as keen on the design of the apartments.

Many were keen to see the development as a place that will engage young people as a driving force behind the innovation required to activate the space. Several respondents also

wanted to ensure that the development embraced sustainability principles, with 5-star energy ratings elements incorporated into all aspects of the development.

Depending on the ultimate mix of uses chosen for the Royal Adelaide site, it is possible that rezoning through a Development Plan Amendment (DPA) will be required in the future.

The outcomes of the survey along with facilitated targeted conversations with young people, held in May 2017, will feed into broader consultation by Renewal SA on the Royal Adelaide site in 2017 and will be valuable in considering the appropriate zoning policy for the site.

1. Background

Renewal SA on behalf of the State Government of South Australia is leading the redevelopment of the Royal Adelaide site (the site). The State Government sees the re-development as a once in a generation opportunity to transform the 7 hectare Royal Adelaide Hospital site on North Terrace into an internationally acclaimed mixed-use precinct.

In May 2017 Renewal SA engaged with targeted stakeholder groups, building on the consultation which Renewal SA undertook in November/December 2016 and with the objective of gaining views from a larger representation of those specific groups than was achieved through the earlier engagement.

The May 2017 engagement targeted two key groups: youth and business entrepreneurs, through:

- a) a series of facilitated interactive workshop sessions with school and university students and young entrepreneurs; and
- b) an online survey.

This engagement report focuses on the outcomes of the online survey which was open on the Adelaide Riverbank website from Wednesday 26 April to Tuesday 16 May 2017.

Through the survey, Renewal SA sought the views of young business people and entrepreneurs between the ages of 18 and 35 on what attracts them to the Adelaide CBD and, in particular, what would attract them to the Royal Adelaide Hospital site upon redevelopment.

Renewal SA invited potential respondents to the survey through an EDM sent to the Adelaide Riverbank database and via the following organisations: City of Adelaide; Adelaide University; the University of South Australia (UniSA); the SA Young Professionals Network; The Law Society of South Australia; and the South Australian chapters of the Property Council, Planning Institute of Australia (PIA), Urban Development Institute of Australia (UDIA) and Housing Industry Association (HIA).

Independent community engagement specialist, Kath Moore and Associates was engaged by Renewal SA to collate, analyse and report on the key findings from the online survey.

1.1 Purpose of the Engagement

In seeking people's views, Renewal SA advised that the views will help shape the best way for this development to transform the East End of Adelaide's central business district while respecting the historic and cultural heritage of the site.

2. Engagement Findings

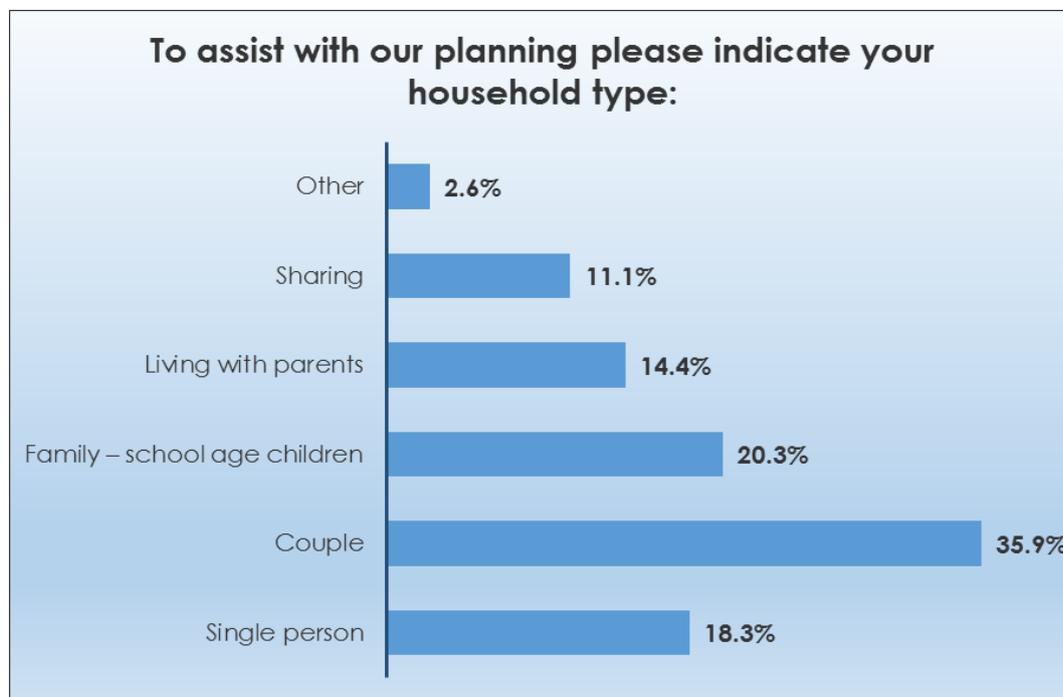
Outlined below is a summary of the key findings from the online survey. In total, 153 responses were received. The key findings have been broken down into the 13 key questions from the survey.

A 'word cloud' has been created for some questions to provide a visual illustration of the most commonly used word in the responses to these questions. The largest, bolded words are the most repeated and the number of times it has been used is shown in brackets next to each word. The sentiment for each word highlighted varies, with the explanation summary below each 'word cloud' providing further interpretation and detail.

All responses to the online survey questions are included as a supplement to this main report.

2.1 Household type of respondents

Question 1: To assist with our planning please indicate your household type:



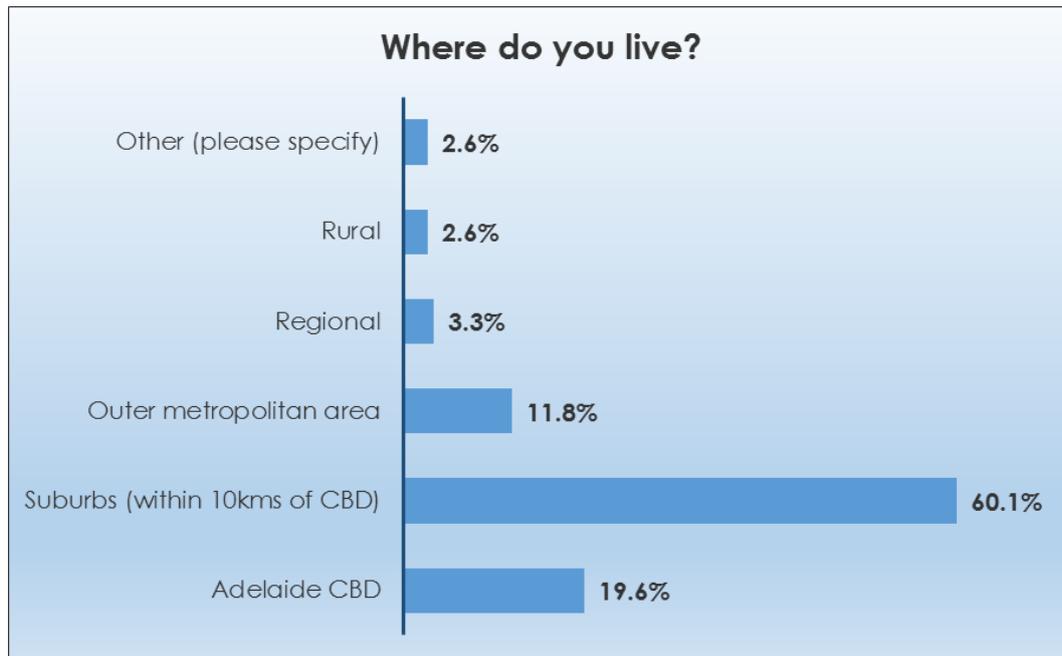
A total of 153 responses was received.

Of those who responded,

- The majority identified as couples
- Couples and families accounted for over half of the respondents (56.2%)
- Four respondents selected 'Other' and identified as young families - single mother with child (1), family with young children (1) and couple with infant child (1), and one who listed 'College' as their household type.

2.2 Where respondents live

Question 2: Where do you live?



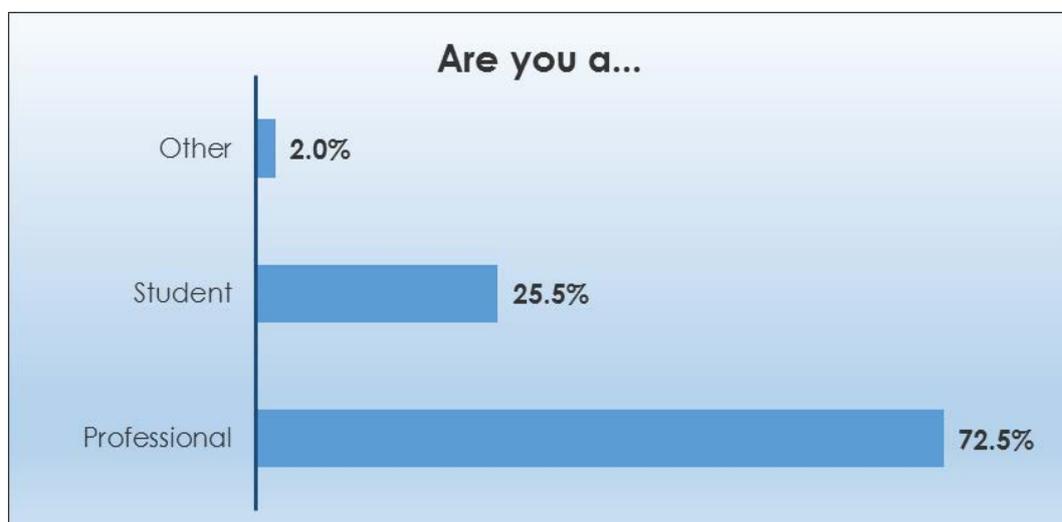
A total of 153 responses was received.

Of those who responded:

- Most lived within 10kms of the Adelaide CBD
- Almost 1/5 lived in the Adelaide CBD
- An overwhelming proportion of respondents (79.7%) lived either in or within 10km of the CBD.
- Four respondents selected 'Other' and identified themselves as living interstate - Melbourne (1) & Canberra (1), or living in an area that did not cleanly fit in one category - Adelaide Hills (1) and Glenelg (1).

2.3 Status of respondents

Question 3: Are you a...



A total of 153 responses was received.

Of those who responded:

- Almost three quarters identified as professionals
- Approximately a quarter identified as students
- Three respondents selected “Other” and identified as a carer (1), pensioner (1) and a student – HDR (PhD) (1).

2.4 Field of work or study

Question 4: Please provide your profession or area of study:

A total of 153 responses was received.

Professions and fields of study were considered against responses listed for Question 3 (Students and Professionals) before being categorised.

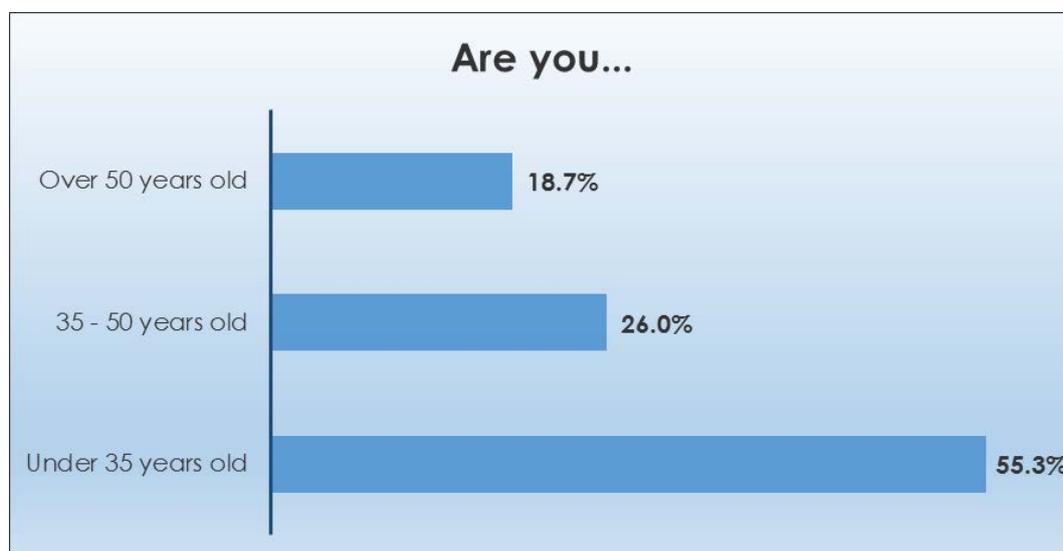
A broad range of fields was identified. The eight most common fields of work or study, accounting for 104 responses are listed below:

- **Academics** – Professionals (11) Students (1) PhD Students (4)
- **Administration** – Professionals (15)
- **Engineering** – Professionals (5) Students (5)
- **Health & Medical** – Professionals (8) Students (6)
- **IT** – Professionals (11)
- **Law** – Professionals (9) Students (2)
- **Marketing, Communications & Event Management** – Professionals (11) Students (2)
- **Urban Design, Architecture & Town Planning** – Professionals (10) Students (4)

Other fields of study, identified more than once included: Humanities, Education, Defence Services, Project Management, Arts – including performance and creative writing.

2.5 Age of respondents

Question 5: Are you...

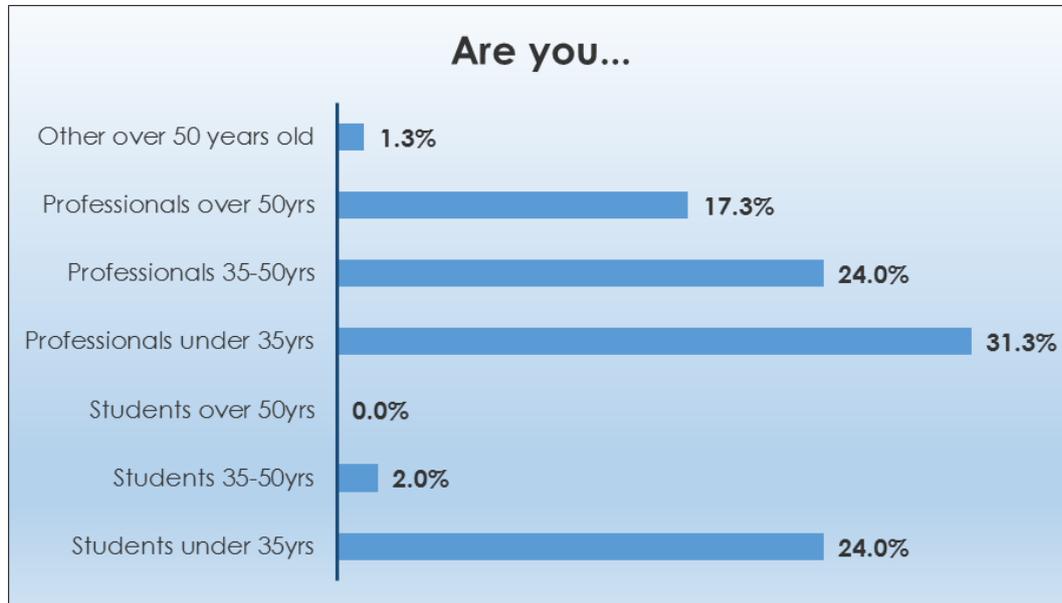


A total of 150 responses was received.

Of those who responded:

- More than half of the respondents were under the age of 35 years (55.3%)
- Almost one quarter of respondents were over 50 years of age (18.7%).

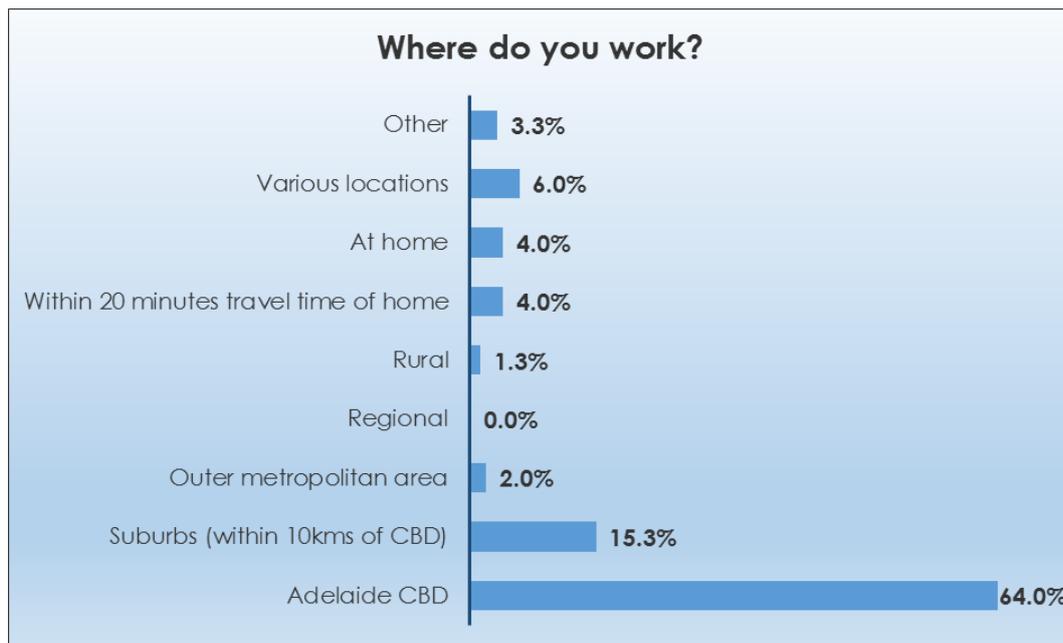
The graph below further breaks down the age categories by status.



- Young professionals make up almost one third of respondents (31.3%)
- The majority of students are under the age of 35 years (24%)
- The majority of responses in the over 35 years age group are from professionals (41.3%).

2.6 Where respondents work

Question 6: Where do you work?



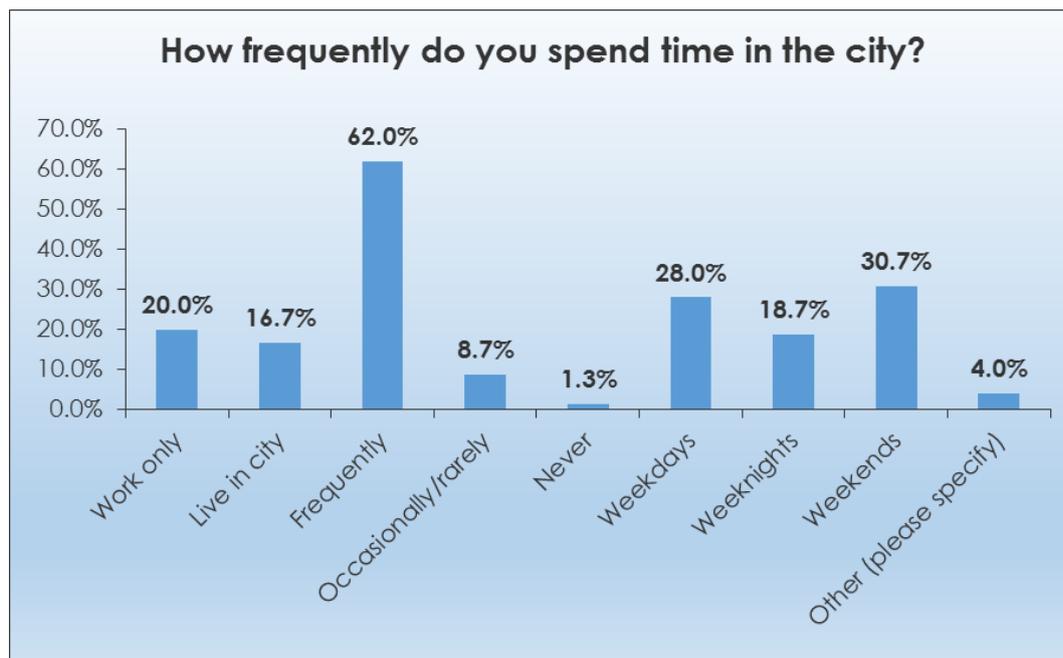
A total of 150 responses was received.

Of those who responded:

- The vast majority work either in the Adelaide CBD or within 10kms of the CBD
- The majority of respondents live and work in the Adelaide CBD or within 10kms of the CBD
- Five respondents selected 'Other' and identified as - student (2), retired (1) & don't have work (1), working in and out of the city (1).

2.7 Frequency and reasons why respondents spend time in the city

Question 7: How frequently do you spend time in the city?



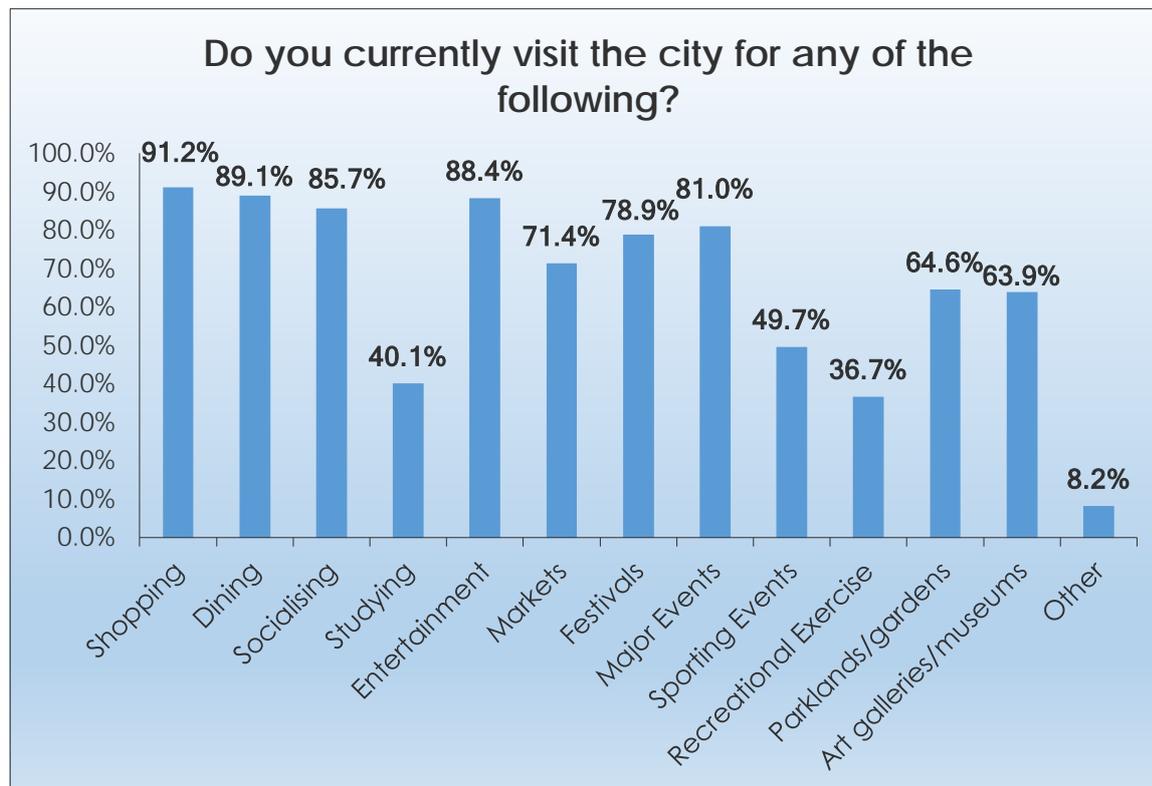
A total of 150 respondents answered this question and were given the opportunity to select multiple responses pertaining to the frequency they visited the city, and when they were likely to.

Of those who responded:

- Over one third work or live in the city and are the highest grouping that frequent the city during weekdays.
- Of the respondents who neither work nor live in the city, 76 visit the city frequently, and another 8 visit occasionally or rarely.
- Of those who state that they visit the city frequently, age nor status was of no real significance.
- Of those that do not live or work in the city, the most frequent visitors to the city are professionals and students under 35 years of age, followed by professionals over 50 years of age.
- Of those who visit the city only occasionally or rarely, most of these live more than 10kms from the Adelaide CBD.
- Weekend (47) visits to the city were most popular, followed by weekday (43) and weeknight (29) visits.
- There were six respondents who selected 'other', with many of these also selecting multiple answers. Those who identified only as 'other' stated that the only visit to study infrequently or they use to live in the Adelaide CBD.

2.8 Reasons respondents visit the city

Question 8: Do you currently visit the city for any of the following?



| | | |
|-----------------------|-------|-----|
| Shopping | 91.2% | 134 |
| Dining | 89.1% | 131 |
| Socialising | 85.7% | 126 |
| Studying | 40.1% | 59 |
| Entertainment | 88.4% | 130 |
| Markets | 71.4% | 105 |
| Festivals | 78.9% | 116 |
| Major Events | 81.0% | 119 |
| Sporting Events | 49.7% | 73 |
| Recreational Exercise | 36.7% | 54 |
| Parklands/gardens | 64.6% | 95 |
| Art galleries/museums | 63.9% | 94 |
| Other | 8.2% | 12 |

A total of 147 responses was received. Multiple choice responses to the questions were allowed.

The top five reasons for visiting the city were:

- Shopping (91.2%)
- Dining (89.1%)
- Entertainment (88.4%)
- Socialising (85.7%)
- Major events (81%)

Twelve respondents selected 'Other' and gave as reasons for visiting the city as being: work (5), visit health services / specialists (3), visit family (1), volunteer work (1), religious activities (1), train station (1) and 'all of the above' categories (1).

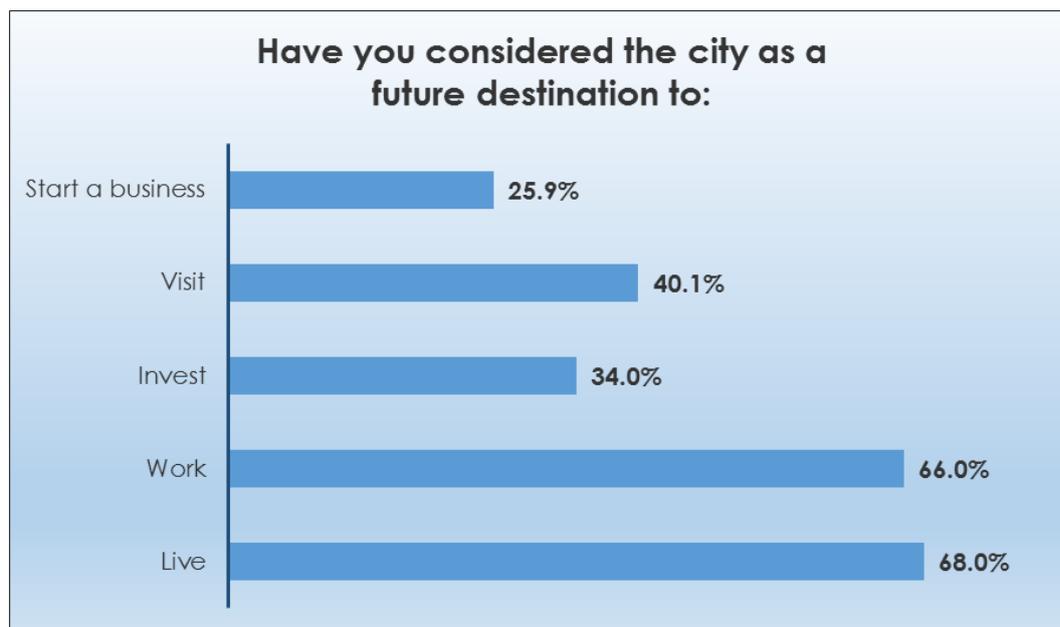
- More and different sources of entertainment such as small, boutique and unique bars, shopping/ retail and dining in addition to vibrant and exciting places to meet and socialise were highlighted.
- More development and diversification of ark Lands and more open spaces within the city were mentioned by some.
- Creating more life in the city and a sense that the city never sleeps, through:
 - longer opening hours,
 - increasing the city population,
 - new exciting infrastructure and places of interest that create the wow factor and a great vibe, making people want to spend more quality time in the city.

Respondent quotes: "I'm quite a 'proud' South Australian and love our small bar culture and encouraging the area to be vibrant. After finishing work each day I love the notion of there being lots of things to do, see and places to eat in the CBD."

"Adelaide needs more of the 'energy and feeling' that you are in a cosmopolitan, modern city full of people and life, regardless if it's the weekend or not."

2.10 What respondents consider are reasons to consider the city as a future destination

Question 10: Have you considered the city as a future destination to:



A total of 147 responses was received. Multiple choice responses were allowed.

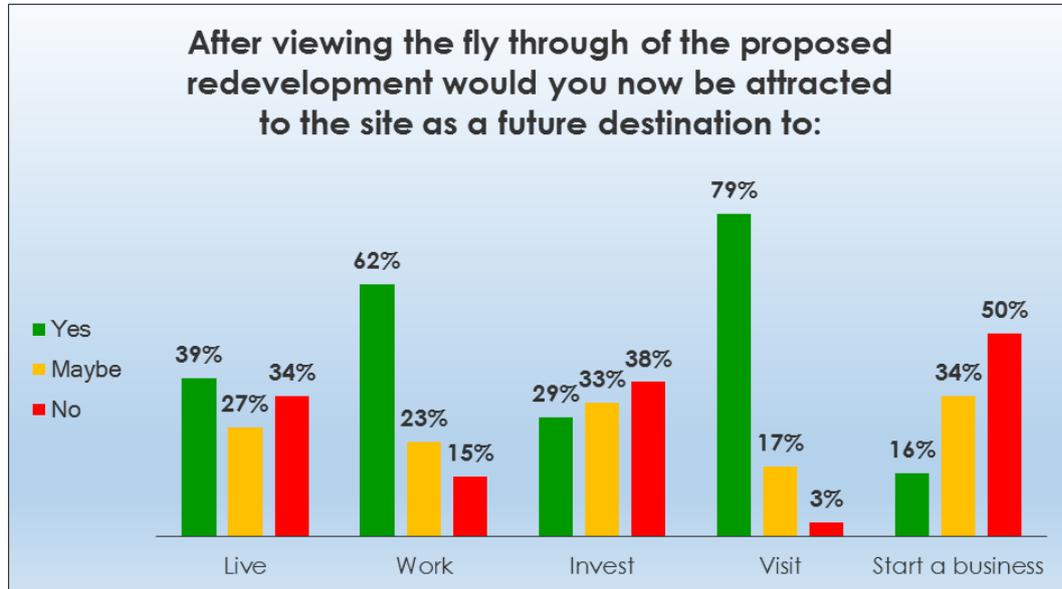
Of those that responded:

- The majority of respondents would consider the city as a future destination for living and working
- Professionals were four to five times more likely to invest or start a business in the city as a future destination than students
- Only 40% of respondents said they would consider visiting the city as a future destination. The same proportion of both students and professionals gave this response. Depending on how the question was interpreted, a lower percentage rate

to this response may have occurred because respondents who are already visiting the city would not necessarily give additional consideration to this in the future, unless they had a specific reason to do so.

2.11 Extent to which respondents would be attracted to the ORAH site as a future destination

Question 11: After viewing the plans/images proposed would you now be attracted to the ORAH site as a future destination to:



A total of 116 responses was received.

After viewing the fly through of the proposed development:

- The vast majority of respondents were interested in visiting or potentially visiting the site as a future destination (79%) which is a 39% higher response rate than for question 10.
- A majority of respondents would also consider working at the site (62%)
- More than one third of respondents would definitely consider living at the site (39%), with more than half potentially considering this in the future (66%)
- Less than one third would definitely consider investing in the site (29%), although taking into account those that are potentially interested, the figure rises to more than half of respondents (62%)
- The lowest proportion of respondents would definitely consider starting a business on the site (16%), although taking into account those that are potentially interested, the figures raised to half of respondents (50%).

2.12 Reasons respondents gave after viewing the fly through

Question 12: In relation to question 11, please let us know the reasons for your responses and why:

A total of 116 responses was received.

- Too much residential development on area that could be used for parklands
- Don't have enough information, can't tell what type of housing will be available to give real consideration to the question.

Working at the site

A small number of respondents gave reasons for considering the site as a future destination to work. Of those who did, reasons as to why they would consider moving to the site include:

- Bigger business and bustling place to work
- More job opportunities expected at the site, job creation and more available jobs
- Vibrant place to work.

Main reasons respondents gave for not considering the site as a workplace in the future include:

- Already work in close proximity and see no reason to change workplace
- Lack of incentive to work in the city – traffic, expensive parking, lack of good public transport.

Investing in the site

Of the small number of respondents who would consider investing in the site in the future, the main reasons given were:

- Investment opportunities in Adelaide attractive – opportunities for expansion
- If money was available, would invest in this site

Main reasons respondents gave for not considering investing in the site in the future include:

- Businesses are moving out of the CBD
- Not perceived as good an investment as eastern states
- No interest in investing in any location
- Possible over supply of apartments will be a turn off for property investment.

Visiting the site

Several respondents gave reasons for visiting the site, the majority being positive comments. Of those who would consider visiting the site in the future, they gave the main reasons as being:

- Great location for multipurpose use of space – civic centre activities, open space areas, accommodation, art and culture and places to socialise
- Contemporary art building, performance space, fine arts and educational boulevard is appealing
- Blend of parklands, heritage buildings and type of development – seems vibrant and exciting
- Will visit if there are interesting, exciting things to do and restaurants, shops, event spaces.

Of the small number of respondents who would not consider visiting the site in the future the main reasons were:

- Development of site is not supported – want used for open parklands
- Development is conservative, unappealing architecture, not all that exciting.

Starting a business at the site

A small number of respondents gave reasons for considering starting a business at the site. The main reasons given include:

- Currently launching a new business and interested in small shopfront and office with other start-ups / small businesses in the development
- Expansion and development of the Adelaide CBD is promising for small business start-ups.

A couple of respondents gave their reasons for not considering starting a business at the site. These included:

- Businesses are moving out of the CBD, lots of empty buildings – other areas will become ghost towns
- No interest in starting a business of any kind – here or elsewhere.

Respondent quotes: “It looks like it could be a vibrant place to live. It’s modern and gives this part of the city a refreshed look”

“More usable entertainment spaces and parklands are fantastic plus shopping and cafes to make Adelaide more cosmopolitan”

“I love the idea of new and interesting public and performance spaces”

“Looks like there are some interesting galleries to visit and restaurants to go. Great to see residential development on the site to increase the 24/7 buzz of the place”

“One of the best things of Adelaide is it doesn’t have many city skylines and has lots of beautiful green lands and historical buildings. I think it is wider to re-design and re-examine the current usage of all buildings. If the new city plan is decreasing the green space and old buildings, I won’t feel like living in the city.”

2.13 Other comments

Question 13: Do you have any other comments?

A total of 58 response was received.

Outlined below is ‘word cloud’ showing the most commonly repeated words to response to the question.



Some specific comments offered by respondents centring on the key themes above are outlined below.

Buildings & Development:

- “Facades of buildings on Frome Rd should be preserved where possible. Older looking buildings, combined with plane trees helps to bridge the gap between the Park Lands and the CBD proper.”
- “I don't mind development of the site in keeping with the heritage buildings however reproducing the bulky buildings right on the periphery of the Botanic Gardens is a mistake.”
- “In general I love the proposal. I do however, feel quite strongly that at least the facade of the Modern-style Eleanor Harauld building on Frome Road should be retained. It is quite unique to the CBD and would be a great loss.”
- “I am very much in support of a MONA-style modern art gallery somewhere on site.”
- “Just make sure you have affordable retail and hospitality venues for the everyday person to enjoy, too much high end can cause lack of interest and we don't want these areas to be vacant.”
- “If the state wanted to invest in innovation and start up for the sake of the economy and keeping young people in Adelaide, it is really important that the younger generation see this site and Adelaide as a place to be, so it needs to be aimed at them too.”

Gardens, Green & Apartments:

- “The new buildings have the chance to open up and view the Botanic Gardens whilst being situated in the middle of a city.”
- “I would like more green space, and a lower profile in height for the hotel and apartments, roof gardens and larger garden balconies, plus green walls.”
- “Not a fan of the design of the residential apartments... I think it needs to really be sleek and organic, to fit in with the adjacent gardens. Curves, glass, greenery (something like halfway down this page <http://inhabitat.com/fusionopolis-singapore%E2%80%99s-new-green-skyscraper/>).”

Space:

- “The South Australia arts sector is ready to engage in creating a space that reflects the vibrancy and quality of the sector, and brings it into the 21st century.”
- “An area to hold some Fringe festival performances - Gluttony etc. would be ideal as the current space for these is getting smaller as the festival grows.”
- “I would love to know more about how this space will engage young people, given that they will be the driving force behind much of the innovation required to activate the space. How is this a space that will be available and accessible to them to live, work and play in?”
- “Looking forward to careful planning of the mixed use space for all to enjoy. All roof space should use solar panels, 5 star energy rating for all developments and green the space as much as possible.”
- “Very happy with the connecting pathways around the city, much needed.”
- “Cycling connectivity needs improvement.”
- “Visuals look great – hopefully significant underground parking will be incorporated into the development.”

3. Next Steps

Depending on the ultimate mix of uses chosen for the Royal Adelaide site, it is possible that rezoning through a Development Plan Amendment (DPA) will be required in the future.

The outcomes of both the survey and facilitated targeted conversations with young people, held in May 2017, will feed into broader consultation by Renewal SA on the old Royal Adelaide site in 2017 and will be valuable in considering the appropriate zoning policy for the site.