

Revitalising King William Road

City of Unley

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Table of Contents

The Mission & Objectives	3
Methodology & Sample Overview	4
Executive Summary	7
Key Findings	8
Strategy	9
What makes a good business	10

The Story

Adelaide Precinct Perceptions	11
Visitor Motivations	12
Brand Perceptions	13
Travel modes	15
Travel distance	16
Parking	17
Strengths of KWR	22
The Road	23
Satisfaction	25
Improvements	27
Priorities	28
Advertising	30

In-depth interviews

Summary	34
Current business performance	35
KWR performance	36
Trends	37
KWR Strengths	38
KWR Weaknesses	39
Parking	40
Aesthetics	41
Positioning	42
Local	44
Destination	45
Collaboration	46

Tables of Survey Data	50
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“To explore perceptions of the King William Road precinct along with visitor demographics and visitor behaviour.”

Objectives

The challenge of a complex organisation such as the City of Unley is to understand not only the service priorities but also how to increase 'relevance' in the lives of residents, businesses and customers and ultimately improve the quality of their life in living/ working/ visiting the City of Unley, in particular, The King William Road Precinct.

- Measure business vs. visitor perspectives of King William Road
- Profile visitors and local residents [including a wider region target audience]
- Explore issues and concerns of visitors, resident and businesses
- Understand how to best meet the needs of visitors
- Identify priority areas for improvement and how to best engage with visitors and businesses

The research methodology included a face-to-face / online survey conducted with both visitors and businesses. a phone survey and in-depth interviews.

The research discussed and explored the key visitation drivers, the different perspectives businesses and visitors have, strengths, weaknesses and opportunities for improvement.

The report shows comparisons between visitors (face-to-face interviews) and local and wider region residents (phone surveys).

This project was carried out in compliance with ISO 20252.

In-depth interviews

Number of interviews	5
Groups Interviewed	Landlord x 1 Businesses x 7 <ul style="list-style-type: none">▪ The Pot/Melt▪ Mulots Patisserie▪ Medi Pedi▪ Dulwich Bakery▪ Endota Spa▪ Biba Boutique▪ Newsagency
Interview length	30 minutes
Interviewers	Jason Dunstone
Collection Dates	29 November – 18 December

Visitor/Online Survey Sample Overview

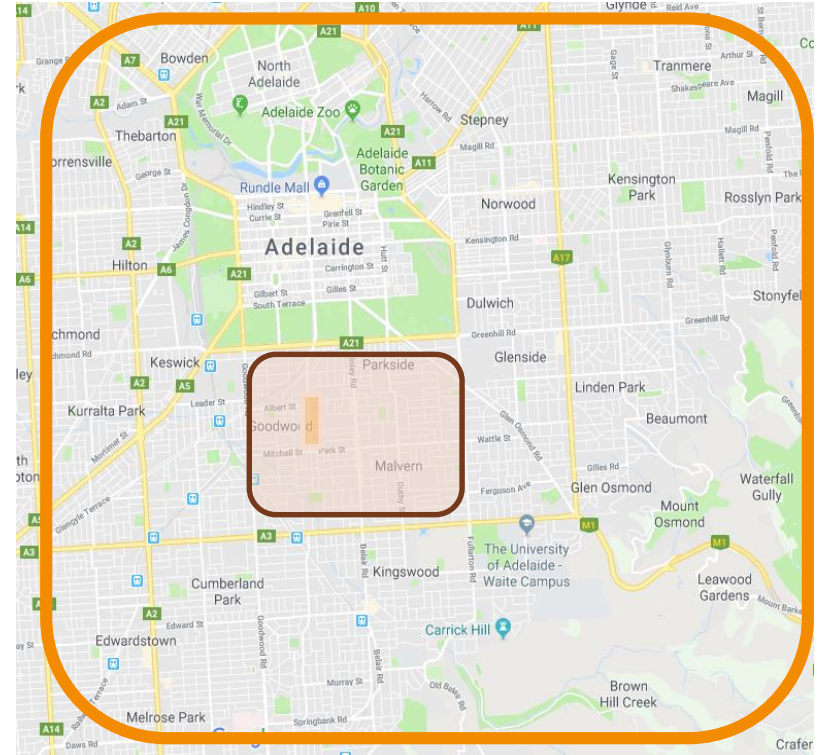
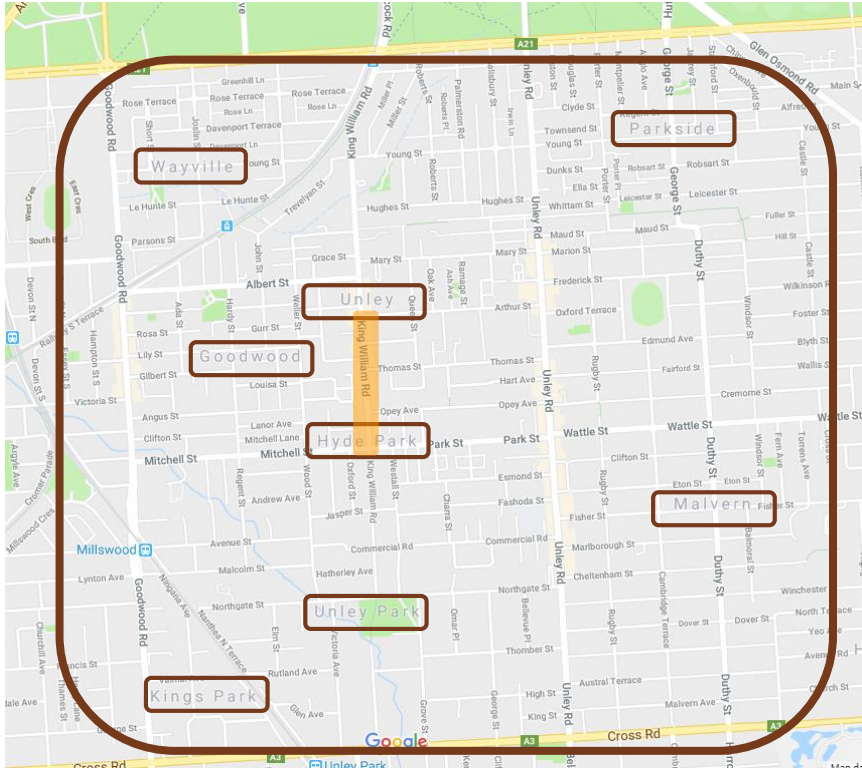
Sample achieved	238
Sample source	Visitors of King William Road
Distribution of survey	Face-to-Face [n=236] Online [n=2]
Questionnaire length	5 minutes
Margin of error	6%
Collection Dates	15 November – 25 November

Phone Survey Sample Overview

Sample achieved	200
Sample source	Whhite pages Local region: Local Residents in surrounding suburbs [see page 5] Wider region: Wider region target market [see page 6]
Distribution of survey	Phone
Questionnaire length	10 minutes
Margin of error	7%
Collection Dates	23 -29 November

Local Region [phone survey]

Wider Region [phone survey] **square holes**[®]

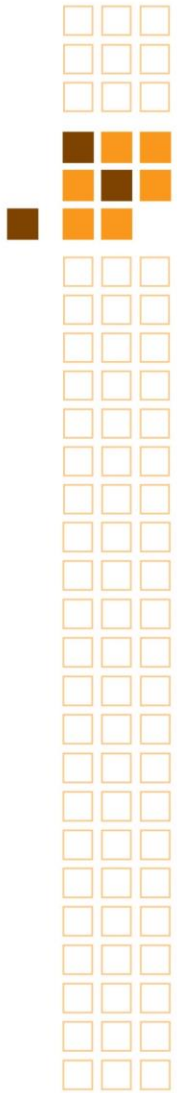


- Wayville
- Unley
- Goodwood
- Millswood
- Unley Park
- Kings Park
- Parkside
- Malvern
- Hyde Park

- Adelaide
- North Adelaide
- Norwood
- Dulwich
- Glenside
- Linden Park
- Fullarton
- Springfield
- Kensington
- Kingswood
- Hawthorn
- Mitcham
- Westbourne Park
- Lower Mitcham
- Cumberland Park
- Clarence Gardens

- Clarence Park
- Keswick
- Glandore
- Kurralta Park
- Everard Park
- Blackforest
- Ashford
- Baumont
- Glen Osmond
- Mt Osmond
- Myrtle Bank
- Glenunga
- St Georges
- Tusmore
- Hazelwood Park
- Urrbrae
- Netherby
- Highgate

- Frewville
- Eastwood
- Torrens Park
- Colonel Light Gardens
- Melrose Park
- Toorak Gardens



Executive Summary

Executive Summary

The 'unique atmosphere' is what sets King William Road apart and is the reason people visit, and traders choose the Street. Businesses note that King William Road was **thriving 10 to 20 years ago, but has been performing below this since**. Loosing its vibe because of negative perceptions (empty shops, expensive and poor parking) as well as an increase in online and offline competition. Visitors see King William Road as a **good place to meet friends and family, browse and visit cafés** and restaurants.

Landlords and traders have noted a shift in the past two years and sense improvements are slowly occurring. The current paving and parking are not seen as the major issues, although aesthetic improvement is important. To make King William thrive again the Council needs to ensure all stakeholders are **collaborating towards the same mission and precinct strategy**. The mission to achieve the right mix of successful businesses, strong local and wider region support, and minimal levels of vacancy.

The Council can help promote the strip to both potential traders and visitors by **highlighting the strengths and showcasing successful operators**. Visitors want a variety of stores and street-scaping which will help King William Road return to a destination people want to explore and regularly visit. **Why should more people visit King William Road rather than elsewhere?**





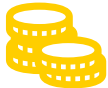
Parking is less of a major issue than perceived. People find parks, they are more dissatisfied when they do not get to park on King William Road itself. To reiterate this, 45% of visitors walked less than 50 metres to their destination and the average distance visitors walked to their destination was 155 metres.



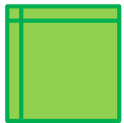
People are more likely to walk to King William Road contrary to what businesses believe.



Residents from the wider region are more likely to see King William Road as a destination for shopping, whereas local residents are more likely to visit for hospitality.



Visitors spent on average \$70 on the day they were surveyed. They usually spend \$65. Residents spend on average \$50. Local region usually spend \$44 and wider region \$59.



The current paving is the preferred road surface option.

King William Road needs to continue to satisfy the **needs of locals** by offering a variety of stores, accessibility and convenience. Whilst also **being a destination** that draws people from a variety of locations.

KWR Brand

Opportunity exists for King William Road **highlight its point of difference**, reminding the public of the unique ambiance, atmosphere and vibe. Promote positive perceptions and the mix of high quality businesses.

Winning the locals and being a destination strip

The major **stakeholders need to collaborate** on building a strong precinct strategy and work towards to achieving the desired outcome.

Precinct collaboration

Focus on the customer experience. Each successful business draws more people in and increases foot-traffic and exposure for other businesses.

Traders

Vibrancy

Leading the precinct plan, ensuring stakeholders are working together. Beautify the aesthetics of the street, promoting the street and training businesses where necessary.

Understanding their role in the precinct and that the right traders play an important role in the perception of KWR's brand and vibrancy. Successful tenancy has a flow on effect for businesses, landlords and the council.

Landlords

Council

What makes a good business?

Good businesses...

- ✓ **Offer a high quality product / service:** which generates organic word of mouth.
- ✓ **Understanding the market:** they know their industry and the customers expectations.
 - ✓ Innovate: are aware of trends, are nimble and quick to adapt with an attitude to embrace change rather than fear it.
- ✓ **Offer an experience:** they make the customer feel special.
 - ✓ Shop fit-out / website: reflects the business vibe, easy to use, cool.
 - ✓ Customer service: exceeds customer expectations.
- ✓ **Build a tribe:** loyal customers return and grow the business through both spend and sharing their positive experiences
- ✓ **Maximise on social media:**
 - ✓ Offering aesthetical products worthy of sharing (user generated content).
 - ✓ Create a strong brand.
 - ✓ Instagram: share content relevant to their target market and highlight what the business is about.
 - ✓ Collaborate with Adelaide pages to showcase their business to a wider audience.
- ✓ **Smart advertising:** targeted, arousing and impactful marketing.

Struggling businesses...

- Are failing to achieve the above and stay relevant in the changing world.
- They tend to **blame external factors and deflect responsibilities.**
- Competition has increased with online shopping, while consumer choice and the shopping experience is improving; Burnside, Rundle Mall, Rundle Street, Westfield Marion, Parade, etc.
- Competition for hospitality.

From the feedback from businesses it was clear that some are doing very well while others seem to be struggling. Those doing well are perceived to be strategic businesses offering a customer experience beyond the basics and being a destination in their own right.

Adelaide Precinct Perceptions

Which of the following shopping precincts do you associate with these types of shopping?



King William Road is seen as a place for walking and browsing, meeting family and friends and has a variety of cafes and restaurants. Similarly perceived as the Parade Norwood, yet further away from retail shopping which is more closely associated to the Parade and Rundle Mall.

Visitation Motivations

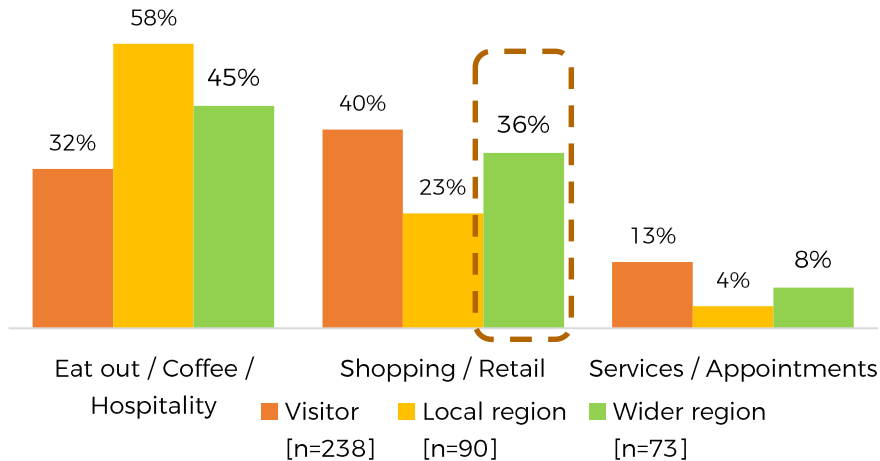
Shopping is the primary motivation for visitors, with hospitality options following closely.

For local residents, eating out/hospitality is the most common reason for visiting, while residents in the wider region are similarly likely visit for hospitality and shopping.

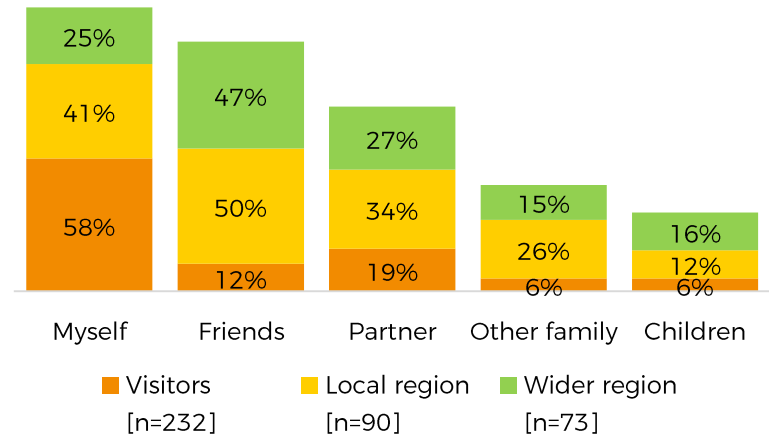
- Visiting KWR as a destination for shopping is more common for residents in wider regions, than for local residents.

Residents usually visit with friends. More than half the visitors had attend time by themselves.

Primary reasons for visiting King William Road



Who do you usually visit with or meet on King William Road?



Brand Perceptions

Visitors describe King William Road as busy, especially for shopping. Other words that come to mind are food and coffee shops, convenient, unique, expensive, cosmopolitan, atmosphere, pretty, quality and more.

Negative associations are far less common but include dying, sad, noisy and crowded.





“Beautiful nice local paved road, nearby and convenient.”

[Resident]

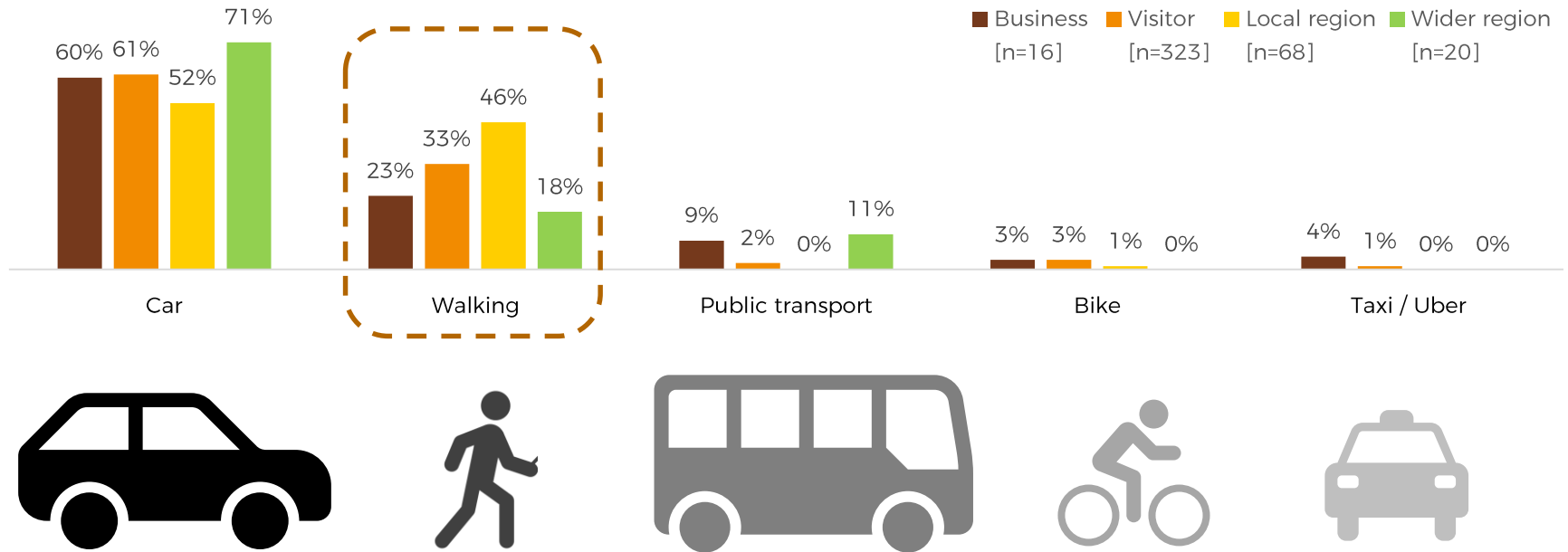
“Variety of stores and cafes quite relaxed feel to it.”

[Resident]

Travel modes

Most people travel to King William Road by car with local residents almost as likely to drive and walk.
[Businesses believe less people walk to the street than actually do].

How do you usually travel to King William Road?



Travel distance

Two thirds of people visit from home, with 21% coming from work. Others visited from a combination of the both or schools.

Visitors travel a variety of distances and of those who travel more than 10kms, it was from a southern direction. Local residents rarely travel more than 5kms and residents from the wider region are more likely to travel between 3-10kms.

Where do you, or would you usually travel from to get to King William Road?



HOME

Visitors: 66%

Local: 92%

Wider region: 95%



WORK

Visitors: 21%

Local: 0%

Wider region: 4%



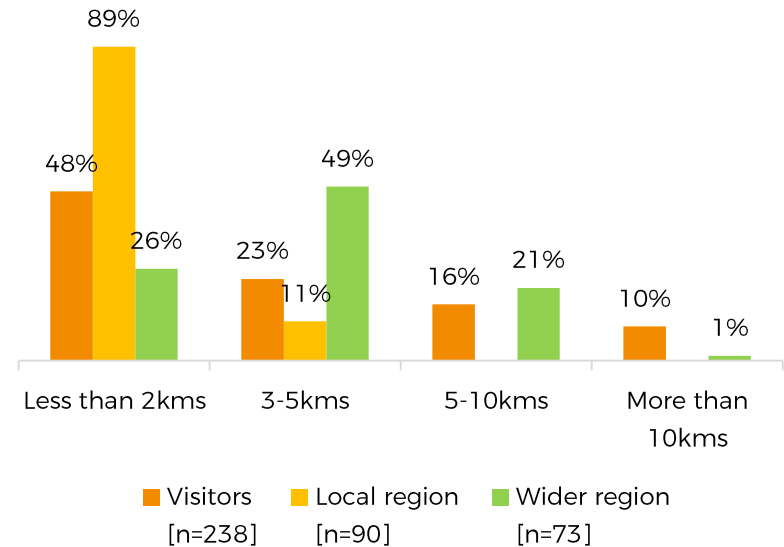
OTHER

Visitors: 10%

Local: 8%

Wider region: 1%

Distance travelled



Parking

Visitors often park off-street, local residents typically on a side street.
Residents were 100% aware of off-street parking whilst
visitors had 87% awareness (some international tourists were surveyed).



Off-street

Visitors: 68%

Local region: 33%

Wider region: 26%



On King William Road

Visitors: 16%

Local region: 22%

Wider region: 23%



On a side-street

Visitors: 16%

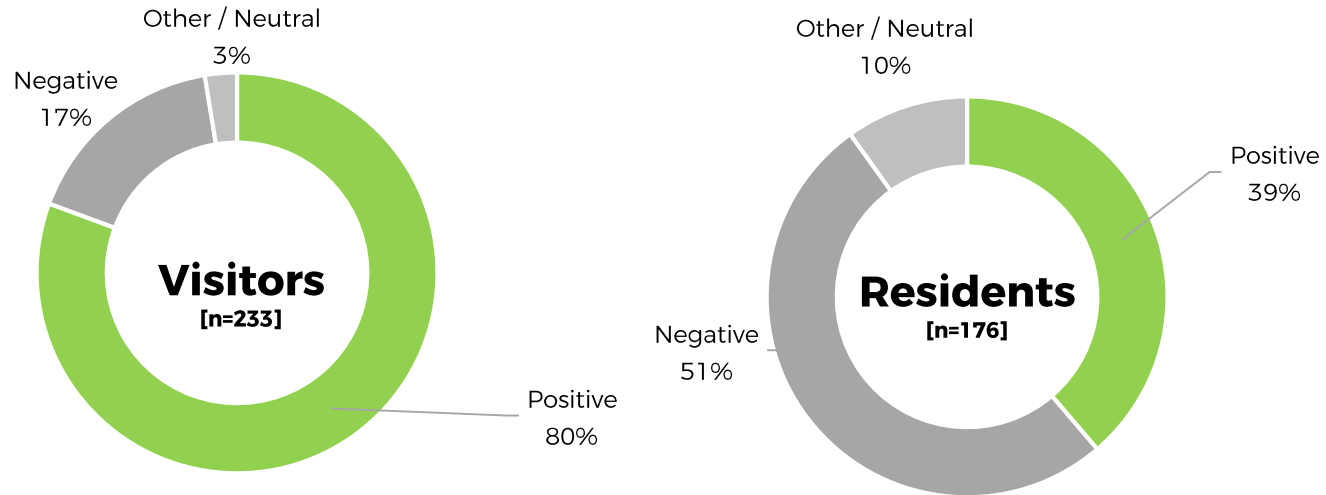
Local region: 45%

Wider region: 51%

Parking

Parking from a visitors perspective and 40% of residents was positive, while approximately half of the residents surveyed made negative comments about the parking situation.

The visitors who found a park on King William Road had more positive statements about parking, similar for residents those who often park on King William Road or off-street had more positive statements compared with those who tend to park on a side-street, showing a correlation between side street parking being seen as a negative.



“No problem.”

“Somewhat hard too get sometimes but usually find something.”

“Not good, a lot of traffic when busy - hard to get a park.”

**“There is ridiculous perception of parking,
I think there is always parking.”**

[Business]

**“I don’t see the car parking as a big as issue as everyone else
whinges about. People will find a park somewhere or they come
here in other methods if they want to come to the street.
[Parking] That’s not stopping people coming to the street.”**

[Business]



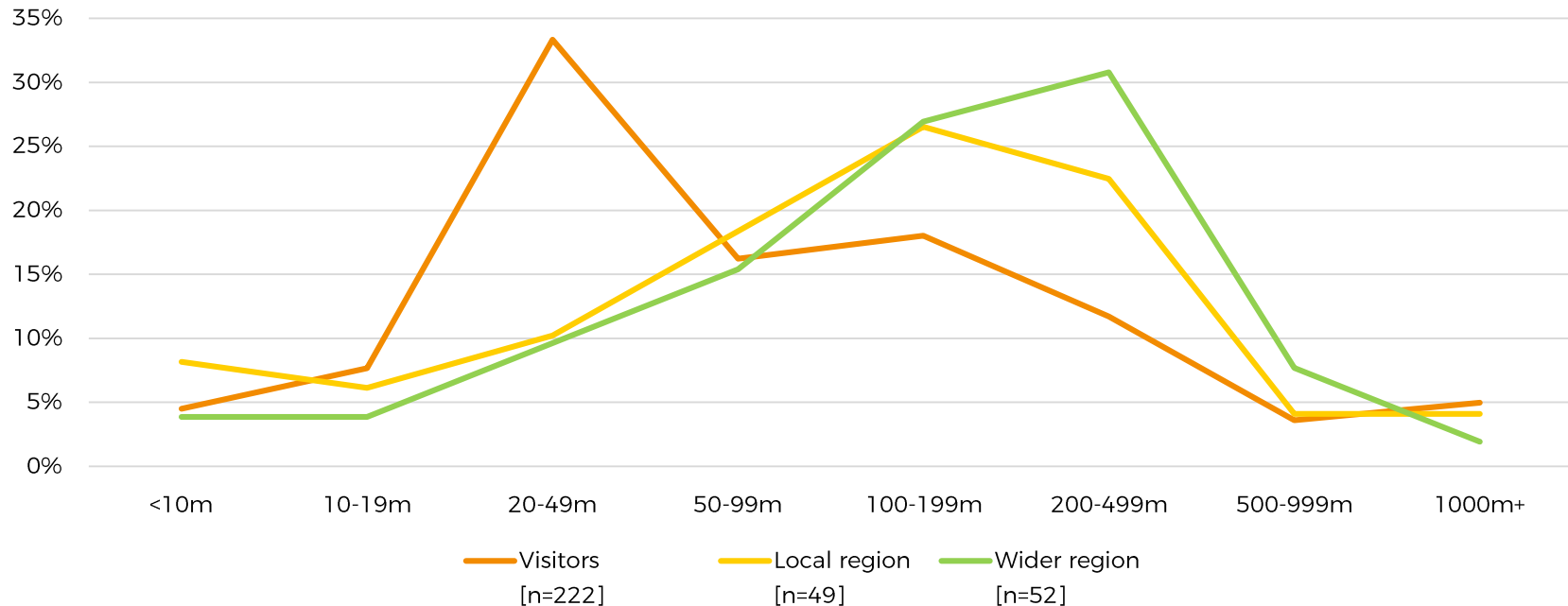
“Parking is an issue but it does not stop people coming to the street.”

[Business]

Parking to destination

45% of visitors walked less than 50 metres to their destination and the average distance visitors walked to their destination was 155 metres. The average distance residents usually walk to their destination is 197 metres.

How far would you walk to your destination(s) on King William Road, from where you park?
[in metres]



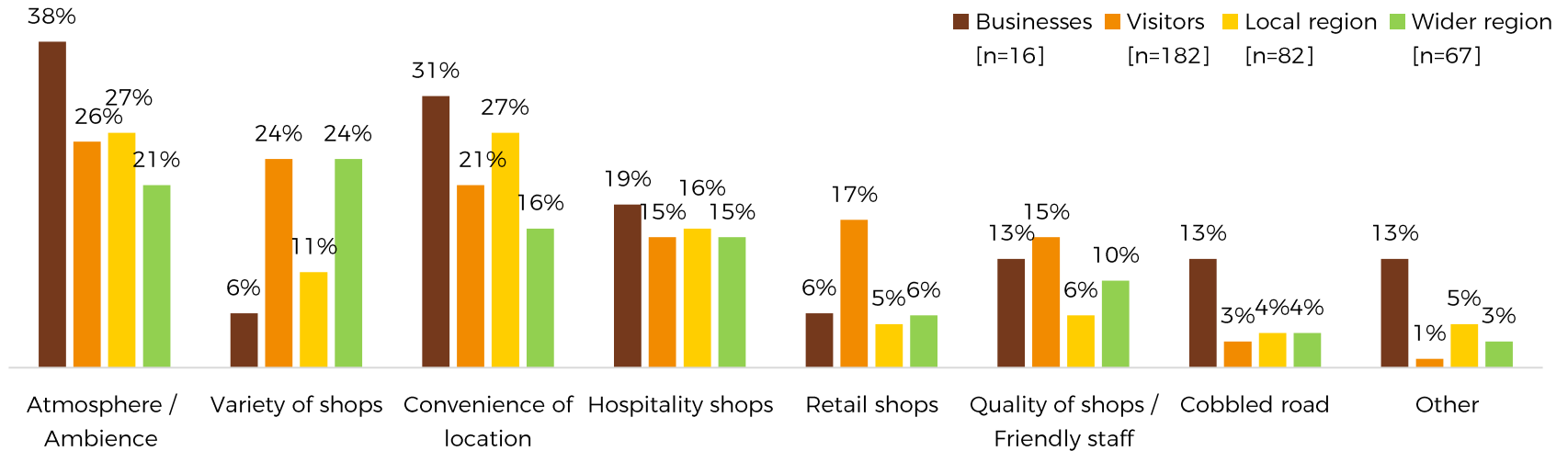
Strengths of KWR

Businesses and visitors love the atmosphere, ambience and vibe of King William Road, and they would love to see this improved with street scaping, more community events [where the street is closed off at night] and full shop tenancy.

Visitors also see a variety of shops as the best part of King William Road, however, businesses and local residents are far less likely to agree. Businesses see the convenience as being a strong positive, however for those in the wider region, it is not as well perceived.

Businesses and visitors both see King William Road as better for hospitality than retail.

What do you like best about King William Road?



The Road

Maintaining the current pavement style is preferred as it provides a uniqueness and adds to the ambience and setting.

“Cobbled streets like Northcote Road [London].”

[Visitor]

“I love the cobblestones.”

[Visitor]

“Paving provides a nice aesthetic.”

[Businesses]

There was also a concern from businesses that by changing something that doesn't need changing, it would be detrimental to traders.

**Consideration is being given to replacing the surface on the road and footpaths
Which of the following would you prefer?**

Column %	Business	Visitor	Phone	Local region	Wider region
Pavement	9	55%	51%	52%	50%
Printed bitumen	5	19%	6%	6%	6%
Bitumen	1	14%	29%	26%	32%
None of these	1	7%	5%	5%	4%
Don't know	0	6%	10%	11%	8%
Column n	16	231	177	93	84



“Replacing the pavers is not going to make any difference besides sending these businesses broke.”

[Business]

“The paving isn’t keeping people away. I think it changes the atmosphere, causes people to drive slower therefore gives them better vision of the shops. It does create a slightly more village atmosphere.”

[Business]

Satisfaction

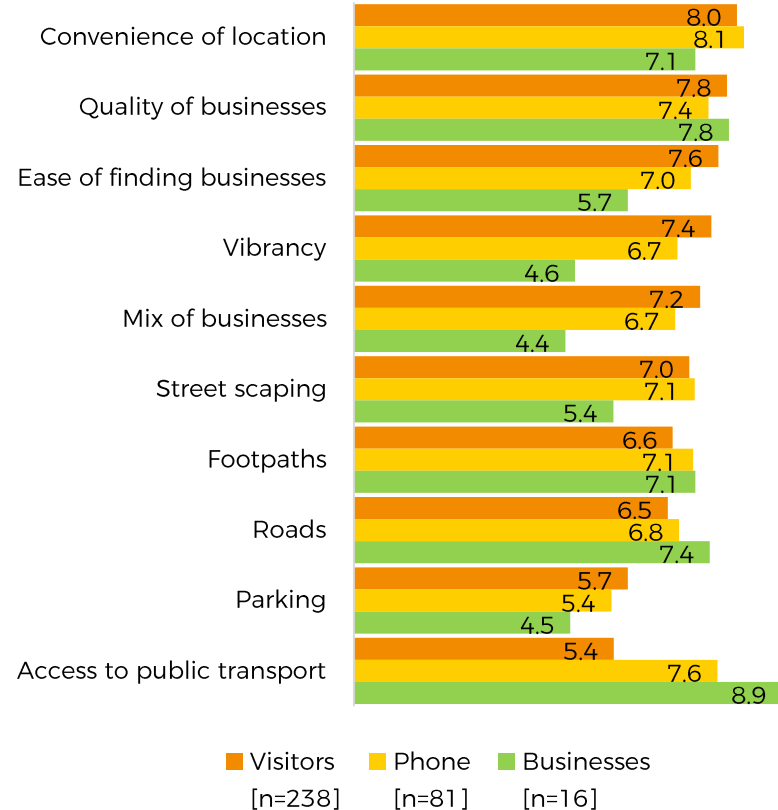
King William Road is highly rated for its convenience and quality of businesses. Businesses were more pessimistic compared to residents and visitors, specifically regarding the ease of finding businesses, vibrancy, mix of businesses, street scaping and parking.

Businesses and residents believe there is good access to public transport, where visitors do not.

Overall visitors were the most satisfied with King William Road.

How would you rate King William Road in the following areas?

[Average score from 0-10]



“Lost its vibrancy it used to have. Too many vacant shops.”

[Resident]

“This streets been flat for 6-7 years, realistically a lot of vacancy ... The street doesn’t have any profile anymore.”

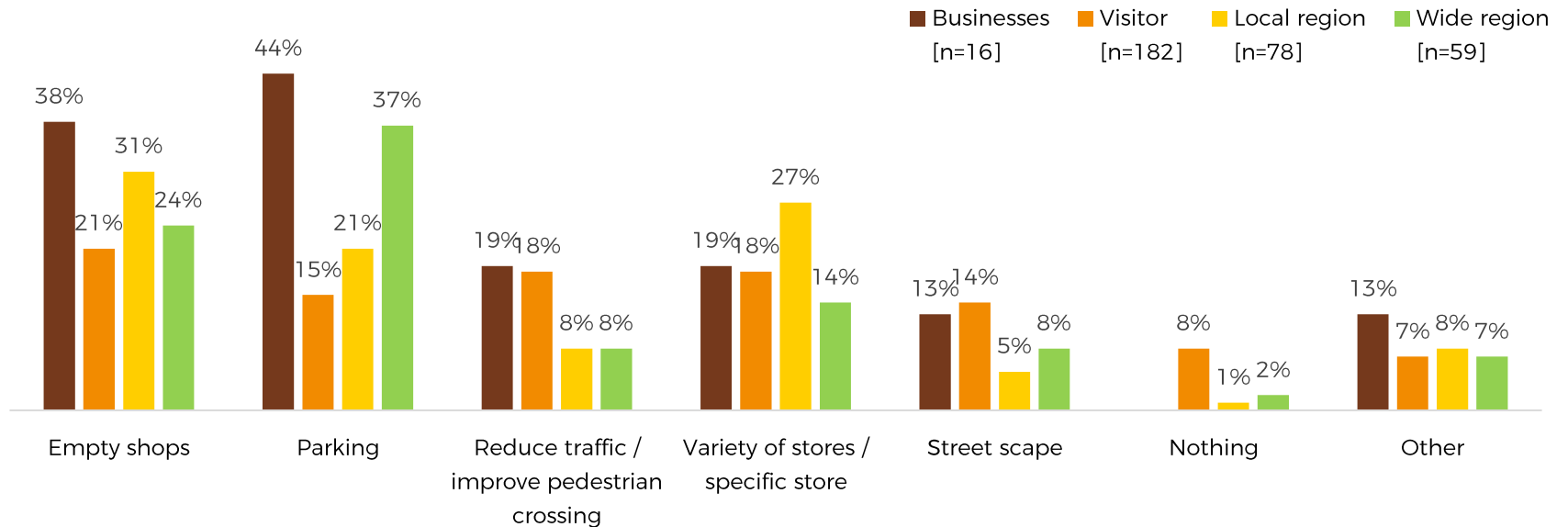
[Business]

“Now it has tilted too much food, so it doesn’t bring the retail shoppers to the strip.”

[Business]

Empty shops was the most significant area for improvement for visitors and those living in the local region. Parking was an area of improvement from businesses and those in wider region [it was noted that some visitors do not know where to park] but less of a concern for visitors and those who live in the local region. Local region visitors are asking for a variety of stores and mentioned specific stores they would like to see on the Street. Traders were also concerned with the mix of businesses, believing there is too much hospitality and not enough retail.

What would you improve about King William Road?



Mix of businesses

Parking

Street Scaping - visitors

Vibrancy - residents



When asked what the top three priorities are for King William Road all came to the consensus that there needs to be a good mix of businesses. A variety of businesses was a common theme throughout the research and many mentioned it was sad to see so many empty shops. Specific businesses leaving such as Lorna Jane, the Body Shop and toy store are missed. Parking was also a priority.

Street scaping was a priority for visitors; requesting more greenery, outdoor shaded areas, better lighting at night and more children play areas. Water fountains and toilets were also requested.

Vibrancy was a priority for residents who have a desire for King William Road to be busy and have regular events.

Other priorities:

- Traffic: safer pedestrian crossing
- More promotion and advertising
- Demand for:
 - Major supermarket
 - Bottle shop
 - Hardware shop

“It needs a facelift, as far as the shops and lighting.”

[Business]

“Rundle Mall, Rundle Street [street scaping] since they rolled out those programs it has taken them to another level.”

[Business]

“More events, better adverts.”

[Resident]

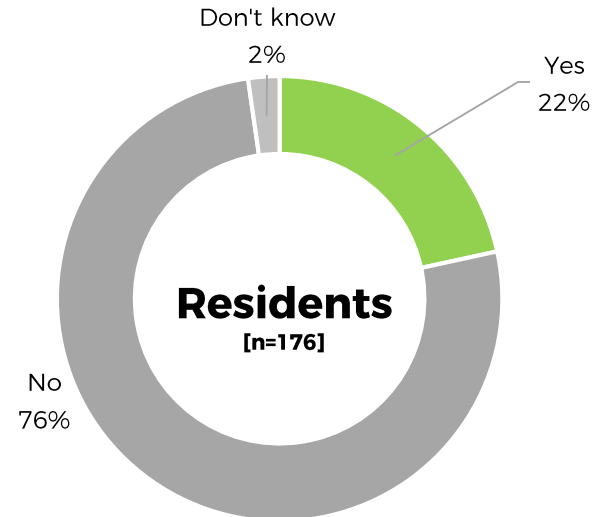
Advertising

40% of visitors had seen advertising and 22% of residents [no major difference was measured between zones].

Signage was seen by a half of the visitors and a fifth of local visitors.

Newspaper / local paper was seen by a third of visitors, a third of local region residents and 44% of residents from wider region.

23% of visitors saw advertising on social media compared with only 5% of residents.



“The street’s unique that it is paved and I think it has that greenery and prettiness about it so getting that out to people so they know to come to this side of town.”

[Business]

“There are good restaurants and good cafes, and we don’t seem to be promoting that, that we [the retailers] are here.”

[Business]

“Making sure that King William Road is up to date with social media posts and being current to draw those young people in.”

[Business]



**“It’s such a beautiful street ...
we need to promote that”**

In-depth Business Interviews

Summary of In-depth Interviews

The newer operators were more typically optimistic compared with the long-standing operators, who spoke consistently about what King William Road used to be. They noted a **decline in foot-traffic and a greater swing towards hospitality**. Newer operators spoke about the community feel, traders working together and the power of social media.

They all saw the priority for businesses is to operate at their best, send positive messages out to customers and supporting one another.

The **priorities for council** are to **maintain the aesthetics** of the street, **improve street scaping** and **offer more off-street carparks or more relevant time limits** [e.g. 30 minutes outside a café rather than 2/3 hours].

Businesses often feel like the rents are overinflated for the area. Traders discussed the need for **council to work with the landlords, offer incentives** and to make it easier for them to **grow their business in a tough environment**.

Current business performance

The stakeholders interviewed generally indicated that they were performing at an okay level. However, that it has become increasingly difficult to operate, especially with rising costs and increasing competition from online, and other precincts. There is an increased need to be strategic and offer an enhanced customer experience.

“Making people want to come back to King William Road because there is this negative that’s around King William Road. We are not trading, there is too many empty shops - I hear that daily.”

Some businesses are doing very well while others seem to be struggling with the business environment. Those doing well are perceived to be **businesses offering a customer experience beyond the basics and being a destination in their own right**. Those struggling have perhaps not adjusted to the new world, have excessive costs and are not offering a unique and valued service. Having a solid customer experience and marketing strategy is viewed as paramount, and often distinguishing the successful from the unsuccessful.

While there is a **general optimism about the future of Kind William Road**, there is a consistent view of an urgent need to **transform perceptions of the Street**. This includes **attracting a suitable mix of businesses** that are able to be successful on the precinct by offering **locals and visitors something attractive**.

Gone are the days when businesses could just expect a flow of customers. Disruption from online and precincts offering an alternative make it much harder to make such assumptions. **Empty shops worsen the perception of King William Road**. Having the right mix of businesses is critical, and ensuring the traders are there for the medium to long term is important. Strategies balancing retaining existing customers and encouraging them to share positive word-of-mouth, with attracting new visitors are important from an individual business and broader precinct level.

“10 years ago there was not a vacancy on that strip.”

All stakeholders indicated that they had a long understanding of King William Road. Most had operated businesses on the Road for more than two decades and those with shorter term business relationships noted a long time personal connection.

The general feedback was that there is now much more competition and **King William Road is less distinctive**. Competition from Burnside Shopping Centre and Norwood Parade for fashion, and even a greater variety of a higher standard and uniqueness has pulled away once loyal boutique fashion shoppers.

And, hospitality competition from the Adelaide City has grown. The trend is now towards patronising the bars and unique quality restaurants with small bar licences, food trucks and plethora of choice. People have moved away from going out in the suburbs. City precincts have worked together – **Council, landlord and traders to build precincts to attract visitors**.

“I think it has changed more to local now, it used to be destination.”

“We need landlords to be supporting retailers.”

King William Road is viewed as having a village feel, and is well supported by many locals, and visitors. **The paving of the roads gave the perception of feeling old-world and unique, and also slowed traffic – a major positive.**

King William Road may not be performing at the level of two decades ago, but local traders are trying hard to evolve to best meet the needs of the new customer in an increasingly competitive market place – online and offline.

There was a **general sense that there have been recent improvements**, after a decline a couple years ago, with many vacant buildings. The Street has attracted many strong performing businesses that are offering a unique and appealing experience. Many of these are finding themselves faced with long queues, of eager customer coming from the local area and beyond.

“The community feel, a lot of the stores band together.”

“We get return customers coming in that like it because they can walk here.”

“The flexibility that King William Road allows us to have. To be open from 10-6pm and three nights a week ‘til 9pm.”

The main weakness of King William Road was that it had **lost its strong perception** as THE destination for boutique fashion and the place to be seen. There is a perception of no consistent brand image, and Norwood Parade, Burnside Shopping Centre and other alternatives have remained more relevant, and evolved significantly over time.

Also mentioned by some was a perception that parking was an issue. Yet for most, this was viewed as more so a perception than the reality. The example was given of Norwood Parade and similar precincts requiring a much longer walk to traders than required on King William Road.

The perceived high level of rent was noted as a concern by some. This was more so from the view that rents paid by some were a disproportionate cost, and high rents assume that the precinct is still a premium shopping strip. Which many believe it no longer is, or not to the extent of twenty years ago.

There was also a perception that there was a lack of Council-Traders-Landlords working together to build a better precinct. Although, talk of Council understood to be setting up a shop-front on King William Road was viewed as positive.

“High rents, not enough people.”

“The constant vacancy, the constant closing downs, hurts the street.”

Exploration of key areas - Parking

Parking was noted as a reason why some believe King William Road is underperforming. However, it was made very clear from across the interviews that the reality is that **parking is generally fine**, and there are much higher priorities that have a more direct impact on visitor numbers – e.g. brand image and mix of traders.

“Parking personally for our staff.”

“[Parking] I don’t think it is an issue with the locals, I think it is probably people coming outside the area.”

“Crossing sections to try and slow the traffic down, to try make it easier for parking and try make it more fabric in the environment.”

Exploration of key areas – Aesthetics

Businesses generally love the aesthetics and feel of King William Road. This includes the old-world local street portrayed by the current paving. They want Council to be more proactive in maintaining the aesthetics and improving the street scaping, working with landlords to **increase greenery**.

Businesses also discussed positioning road street scaping strategically, so **businesses who need outdoor seating areas have them and those that need parking spaces have them**.

Examples of how traders have added to the vibrancy of the street primarily related to **alfresco seating** and innovative uses to take advantage of limited space such as outdoor bars / benches at 50SIXONE and Burger Republic. Bringing the people outdoors adds to the vibrancy of the Street.

Not one mention was made of the need to replace the paving. Most liked it. There was notable concern at the business disruption that would come from any replacing of the paving. One trader noted that when this was done previously, it put many businesses out of business. In the current vulnerable financial state of many businesses such disruption again was warned as very dangerous to individual traders and wider King William Road.



King William Road is a well-known precinct and is associated with having a **high quality mix of retail and hospitality**. Traders believe this **reputation has suffered in recent years** from a combination of world changes, consumer behaviour, businesses failing to remain relevant, the high cost of operating businesses, closures and many visible vacancies. Those interviewed noted an urgent need to **proactively to restore vibrancy**. King William Road has many attributes and successful businesses to leverage its position off. Council, landlords and traders were noted as important to **revitalise** the brand image, and work together to **promote the precinct** by sharing positive stories and re-educating negative perceptions. Ultimately the reputation of King William Road was recognised as coming back to the quality and mix of traders. Many of those noted that if visitors have a poor experience at a trader, they likely will not come back the Street. Ensuring that a positive experience is offered is critical. Offering destination traders and not just another average café is important. King William Road needs to stand for quality hospitality and shopping experiences.

“In this day and age social media and events.”

**“I think it’s marketing, I think it’s brand,
I think it’s trying to attract better operators here.”**

“There is hollowness, there is a lot of vacancy which brings the excitement down. People become dishearten and disappointed because such a beautiful strip, beautiful road, lots of character but then the vacancies spoil it.”

“It’s lost a bit of identify ... I think it needs better operators across all levels, retail and food.”

Exploration of key areas – Local precinct

A major risk for King William Road was flagged as losing the confidence and patronage from people living in walking distance and near-by. As locals slow their support of the Street, and move to other alternatives, the risk is that King William Road traders will find it even more difficult to survive.

Offering appealing convenience stores and a welcoming place for locals to want to visit on a regular basis is important for the future prosperity of the Street.

A key aspect of the King William Road brand identity is a sense of local neighbourhood pride. Some noted that this has weakened in recent decades.

“I feel like I spend a lot of my time trying to pump the street up to my clients.”



Exploration of key areas – Destination

King William Road's successful businesses are often destination businesses. It is important that the wider street returns to a collective destination. Currently many of the popular businesses were viewed as destinations that shoppers visit, then return to their car and drive back home, without exploring the wider street.

The brand identity of King William Road and other strategies to promote King William Road as a destination, and **encouraging browsing and exploring will be valuable moving forward.**



Exploration of key areas – Collaboration

Collaboration between the Council, traders and landlords occurs throughout many areas of the report. The main demand from businesses is they want the Council to ensure landlords are co-operating with them. Council should facilitate the collaboration.

“I deal with other landlords in the city that are all about precincts. Gilles Street, Leigh Street and Peel Street are all about getting the right mix of traders or operators in to build the precinct. The precinct that feeds off of each other and attracts a larger market to service these businesses.”



“Council play a very big part in working with landlords. I think council will have a better chance of persuading landlords that they are not going to get the rents that they had 5 years ago. If council was able to from a credibility point of view say ‘you are not going to get your income from King William Street unless you go to market value or even below market value’ and or council then get involved in initiatives.”

Description of contents

Tables of the Survey Data

When was the last time you visited King William Road, approximately?

Column %	Phone	Local region	Wider region
In the past week	46%	62%	27%
2-4 weeks ago	20%	15%	26%
2-3 months ago	12%	13%	11%
6-12 months ago	8%	2%	15%
1-2 years ago	6%	4%	8%
3-5 years ago	3%	3%	2%
Longer than 5 years ago	4%	0%	8%
Never been	1%	0%	1%
Column n	177	93	84

Over half of residents in local region visit King William Road weekly.
A quarter of wider region residents visit weekly and a quarter every 2-4 weeks.

How often do you visit King William Road?				
Column %	Visitor	Phone	Local region	Wider region
Daily / most days	34%	7%	11%	3%
2-3 times per week	18%	11%	16%	5%
Weekly	7%	11%	19%	3%
Fortnightly	9%	9%	11%	8%
Monthly	8%	16%	12%	20%
Every 2-3 months	5%	15%	10%	22%
Every 4-6 months	6%	8%	4%	11%
Once a year	4%	9%	7%	11%
Less Often	3%	10%	10%	10%
Have never visited	-	4%	0%	8%
First visit	3%	-	-	-
Column n	238	169	90	79

Over half of residents in local region visit King William Road weekly.
 Almost half of local region residents visit weekly but 10% less often than a year.
 Wider region residents usually visit monthly to quarterly.

How many times would you estimate that you have visited King William Road over the past month?

Column %	Visitor	Phone	Local region	Wider region
Once	24%	18%	13%	24%
Twice	7%	18%	15%	22%
Three times	4%	7%	5%	9%
4/5 times	7%	9%	17%	0%
6 times	3%	6%	8%	3%
7-9 times	8%	1%	1%	1%
10+ times	42%	16%	25%	6%
Don't know	5%	24%	15%	35%
Column n	238	152	84	68

Half of the visitors surveyed visited King William road more than 7 times in the past month and a quarter once a month.

A quarter of those who live in the local region visited over 10 times. Almost half of wider region residents visited once or twice during the past month.

What is the primary reason you would visit King William Road?

Column %	Visitor	Phone	Local region	Wider region
Eat out / Coffee / Hospitality	32%	52%	58%	45%
Shopping / Retail	40%	29%	23%	36%
Services / Appointments	13%	6%	4%	8%
Other	10%	13%	14%	11%
Don't know	4%	0%	0%	0%
Column n	238	163	90	73

People attend King William Road for both hospitality, retail and services. Visitors were primarily attending King William Road for shopping. Half the residents surveyed over the phone believe the primary reason they would attend would be hospitality.

Other responses:

- walking
- drive through to the city
- to drive through or ride through
- hobbies
- driving through
- look at things in shops
- eat out and shopping
- atmosphere
- near school
- services/eatery
- work
- eat out work and catching up
- see friends
- to work
- shop eat
- browse
- events
- looking at clothes
- greens pharmacist
- local

Which stores, cafes and other businesses did you visit today?

Column %	Visitor
FoodWorks	29%
Newsagency	17%
Cibo	11%
Fruit & Vege Shop	11%
Hyde Park Bakery	9%
Cotto	7%
50SIXONE	5%
Hyde Park Tavern	5%
Pharmacy	5%
Price Attack	4%
Denmin & Cloth	4%
Melt	4%
Robbies Chop Shop	3%
Wheel & Barrow	3%
Pollen	3%
Flourish	3%
Florist	3%
Wild Child	2%
Blue Illusion	2%
Biba Boutique	2%
Nutrition Republic	1%
Antica Pizza	1%
Don't know	1%
Other	20%
None	2%
Column n	238

Other:

- Burger Republic [x2]
- Bike / Med Spa
- Christo
- Coffee lounge
- Doctor [x2]
- Field Whole Foods
- Hustle
- Karrans
- Lodge
- Move over mens [x4]
- Mulots [x3]
- Musk
- Nat shop
- Parisis
- Plato's [x2]
- Podiatrist
- Post Office [x3]
- Rapismo
- Red Door
- Saville Row / Husk
- Sheuz
- Silk laser
- The Arc
- The field
- The Pot
- Whole foods



Which stores, cafes and other businesses do you usually visit, or would you go there for?

Column %	Visitor	Phone	Local region	Wider region
Newsagency	35%	20%	29%	10%
FoodWorks	32%	12%	19%	4%
Cibo	27%	40%	39%	41%
Fruit & Vege Shop	21%	12%	13%	10%
Hyde Park Bakery	17%	18%	19%	16%
Melt	15%	16%	17%	15%
Hyde Park Tavern	14%	12%	7%	18%
Cotto	13%	15%	23%	4%
50SIXONE	12%	6%	3%	10%
Wheel & Barrow	9%	12%	7%	19%
Denmin & Cloth	8%	6%	6%	7%
Burger Republic	8%	7%	4%	10%
Nutrition Republic	7%	9%	7%	12%
Flourish	7%	9%	9%	8%
Florist	7%	5%	4%	5%
Robbies Chop Shop	5%	2%	3%	0%
Wild Child	4%	7%	4%	11%
Antica Pizza	3%	4%	1%	8%
Other	27%	47%	57%	34%
None	6%	7%	4%	11%
Don't know	3%	7%	6%	8%
Column n				

Other common responses:

- Ark
- Assagio
- Biba Boutique
- Blue illusions
- Dulwich Bakery
- Farina Husk
- Saville Row
- Move over Men
- Mulots
- Parisis
- Pharma World
- Pollen
- Post office
- Price attack
- Red Door
- The Pot

Where do you, or would you usually travel from to get to King William Road?

Column %	Visitor	Phone	Local region	Wider region
Home	66%	93%	92%	95%
Work	21%	2%	0%	4%
Other	10%	5%	8%	1%
Don't know	3%	0%	0%	0%
Column n	238	163	90	73

Other [visitors]:

- Burnside village
- City
- Dance Gouger St - City
- Family visit
- Friends
- Friends place from Canada Montreal
- Glenelg
- Hotel
- Norwood
- Rental property
- Staying over relatives (friend from Germany)
- Staying with cousin
- Staying with family (from Mt Gambier)
- Unley pool
- Unley shops
- Vacation family
- Visiting relatives, from Norway
- Visitor / Hobart

Other [phone]:

- both home and work
- home or school
- school

How far approximately do you, or would you usually travel to get to King William Road?

Column %	Visitor	Phone	Local region	Wider region
Less than 2kms	48%	61%	89%	26%
3-5kms	23%	28%	11%	49%
5-10kms	16%	9%	0%	21%
More than 10kms	10%	1%	0%	1%
Don't know	3%	1%	0%	3%
Column n	238	163	90	73

How do you, or would you usually travel to King William Road?

Column %	Visitor	Phone	Local region	Wider region
Walked	26%	26%	42%	7%
Bike	1%	1%	0%	1%
Car	69%	69%	57%	84%
Public transport	3%	2%	0%	5%
Taxi / Uber	<1%	0%	0%	0%
Other	<1%	2%	1%	3%
Column n	232	163	90	73

Half the visitors travelled less than 2kms to visit King William Road. Most came by car whilst a quarter walked. Local region never travel more than 5kms, choosing to drive and walk. Wider region travel mixed distances, usually by car.

How was parking [CODED]				
Column %	Visitor	Phone	Local region	Wider region
Positive	80%	39%	43%	35%
Negative	17%	51%	51%	52%
Other / Neutral	3%	10%	6%	13%
Base n	156	39%	43%	35%

Positive:	Neutral / Other	Negative
<ul style="list-style-type: none"> ▪ Easy ▪ Good ▪ Excellent ▪ Fine 	<ul style="list-style-type: none"> ▪ Variable depends on the time of day ▪ Need a bit more 	<ul style="list-style-type: none"> ▪ Problem hard to park ▪ Time consuming

Parking was less of a negative issue for visitors, they had obviously found a park and therefore we relatively positive. There was more of a negative perception from residents.

Do you park...				
Column %	Visitor	Phone	Local region	Wider region
On King William Road	16%	22%	22%	23%
On a side street	16%	48%	45%	51%
Off-street	68%	29%	33%	26%
Column n	160	112	51	61

Are you aware there is off-street parking?				
Column %	Visitor	Phone	Local region	Wider region
Yes	87%	100%	100%	100%
No	13%	0%	0%	0%
Column n	52	25	11	14

Visitors tend to park off-street where as local residents on a side street. No residents were unaware of the off-street parking.

How far would you walk to your destination(s) on King William Road, from where you park?

Column %	Visitor	Phone	Local region	Wider region
<10m	5%	6%	8%	4%
10-19m	8%	5%	6%	4%
20-49m	33%	10%	10%	10%
50-99m	16%	17%	18%	15%
100-199m	18%	27%	27%	27%
200-499m	12%	27%	22%	31%
500-999m	4%	6%	4%	8%
1000m+	5%	3%	4%	2%
Column n	222	101	49	52

A third of visitors walk 20-50m to their destination. Residents find they most often walk 100-500m to their destination.

Think about your visits to King William Road over the past month, what percentage of these approximately, would be via the following forms of transport?

Average %	Business	Visitor	Phone	Local region	Wider region
Walked	23%	33%	37%	46%	18%
Bike	3%	3%	1%	1%	0%
Car	60%	61%	58%	52%	71%
Public transport	9%	2%	4%	0%	11%
Taxi / Uber	4%	1%	0%	0%	0%
Other	1%	<1%	<1%	<1%	0%
Column n	16	232	88	68	20

Who do you usually visit with or meet on King William Road?

Column %	Visitor	Phone	Local region	Wider region
Myself	58%	34%	41%	25%
Partner	19%	31%	34%	27%
Children	6%	14%	12%	16%
Friends	12%	48%	50%	47%
Other family	6%	21%	26%	15%
Other (specify)	0%	5%	4%	5%
Column n	232	163	90	73

Other:

- Work colleagues x3
- No one in particular
- Dog
- Clients

Business believe less people walk and more use public transport, taxi's and Uber, compared to what they actually do.

On a typical visit to King William Road, what would you estimate you would spend?

Column %	Visitor	Phone	Local region	Wider region
\$0	2%	2%	3%	0%
<\$10	4%	4%	4%	4%
\$10-19	14%	16%	17%	14%
\$20-49	31%	37%	39%	34%
\$50-99	22%	18%	20%	14%
\$100-149	16%	17%	13%	22%
\$150+	10%	7%	3%	12%
Column n	220	119	69	50

On a typical visit people are spending somewhere to \$20-100 dollars.

Thinking about your revenue over the past month, what percentage of approximately, would you estimate would come from people travelling to King William Road via?

Column %	Businesses
Car	60.6%
Walking	23.8%
Other	7.9%
Taxi / Uber	3.5%
Public transport	2.8%
Bike	1.5%
Column	16

Overall, how satisfied are you with King William Road?
Please use a 0-10 scale where 10 is extremely satisfied and 0 is extremely dissatisfied?

Column %	Businesses	Visitor	Phone	Local region	Wider region
0	6%	3%	0%	0%	0%
1	0%	0%	1%	0%	1%
2	6%	1%	1%	1%	0%
3	0%	1%	2%	2%	1%
4	13%	1%	4%	4%	3%
5	19%	4%	17%	16%	19%
6	13%	5%	17%	22%	10%
7	31%	16%	28%	29%	27%
8	13%	32%	27%	20%	36%
9	0%	27%	2%	1%	3%
10	0%	10%	2%	4%	0%
Average	5.5	7.7	6.6	6.5	6.7
Column n	16	238	163	90	73

Visitors were the most satisfied with King William Road.

What do you like best about King William Road?

Multiple Code Column %	Businesses	Visitor	Phone	Local region	Wider region
Atmosphere / Ambiance	6	26%	24%	27%	21%
Variety of shops	1	24%	17%	11%	24%
Convenience of location	5	21%	22%	27%	16%
Retail shops	1	17%	5%	5%	6%
Hospitality shops	3	15%	15%	16%	15%
Quality of shops / Friendly staff	2	15%	8%	6%	10%
Cobbled road	2	3%	4%	4%	4%
Other	2	1%	4%	5%	3%
Column n	16	216	149	82	67

“Atmosphere / businesses that have quality food and unique shops for clothes.”

“The cobbled road and high street feel.”

“Antique pretty, distinctive appearances, very friendly store owners lots of variety.”

What are the main strengths:**Businesses**

- Scenic, community based
- The location and easy accessibility.
- The charm, established stores, just out the city
- Cafes / restaurants
- "Love the paving" visitors comment. Easy crossing. Shop and Restaurant
- Good mix of shops to bring customers.
- Paving provides a nice aesthetic
- The people that live in the area are nice. The safety of the area.
- The history of the shopping precinct. It was once great.
- The name of the road....what the area previously was. Great community feel.
- Community
- Unique shopping precinct / Close to the city / Part of the community / Parking close to destination
- Good food / Heritage
- Good walkability / Good retail outlets / Sense of Community
- Good locality, restaurants, cafes, shopping all close by
- Good food, the overall look of the street i.e. vines, paved road, boutique store fronts.

What would you improve about King William Road? What's missing?

Column %	Businesses	Visitor	Phone	Local region	Wider region
Empty shops	6	21%	28%	31%	24%
Reduce traffic / improve pedestrian crossing	3	18%	8%	8%	8%
Variety of stores / specific store	3	18%	21%	27%	14%
Parking	7	15%	28%	21%	37%
Street scape	2	14%	7%	5%	8%
Nothing	0	8%	1%	1%	2%
Other	2	7%	7%	8%	7%
Column n	16	182	137	78	59

“Fill empty shops/bring down rent.”

“Nothing just need a little TLC.”

“Safe crossing places.”

“Diversity of shops, instead of empty shops.”

“Needs some money spent on freshen it up. everything a bit tired, empty shops and off putting to visitors.”

“Green spaces, same areas which are open.”

“Footpaths very narrow. need to extend onto road and make it pedestrian friendly.”

What are the main weaknesses:**Businesses**

- Parking
- The terribly high rent, hence leaving shops for lease and empty, and forcing small local SA businesses to close. The road is dead and has been for years now. Nothing interesting anymore, just coffee, coffee, coffee, and hairdressers. About 6 of them.
- Parking, no foot traffic, looking a bit drab, empty stores
- No parking
- No parking. It needs free parking like Burnside. That is a big compliment.
- High rent, turnover of businesses due to the high rent resulting in empty premises.
- Broken damaged parts
- Hard to cross the road because of traffic
- Everyone in other shops used to support each other but now they don't. Does not have a great community feel about it anymore.
- Too old school ... in terms of marketing.
- High rent. Too many food places and not enough retail. No vibrancy like the parade.
- Lack of foot traffic flow. Not enough variety of shops. Deemed to be 'Upper class and expensive' - not so! Deemed to have parking issues - not so!
- Bad parking, not enough shop diversity, too many empty shops, too many cafes, vines cover stores not enough maintenance done on them, more beautifying of street is needed
- Parking / Empty store fronts / High Rents / Lowered foot traffic
- Traffic and parking issues during peak hours
- Customers are unaware of all the car parks available to them. There are too many vacant shops. Not enough retail businesses to generate foot traffic.

How would you rate King William Road in the following areas?
Please use a 0-10 scale where 10 is extremely satisfied and 0 is extremely dissatisfied?

Average	Businesses	Visitor	Phone	Local region	Wider region
Convenience of location	7.1	8.0	8.1	8.6	7.6
Quality of businesses	7.8	7.8	7.4	7.2	7.5
Ease of finding businesses	5.7	7.6	7.0	7.1	6.8
Vibrancy	4.6	7.4	6.7	6.6	6.9
Mix of businesses	4.4	7.2	6.7	6.5	6.9
Street scaping	5.4	7.0	7.1	7.2	6.9
Footpaths	7.1	6.6	7.1	7.1	7.0
Roads	7.4	6.5	6.8	6.8	6.7
Parking	4.5	5.7	5.4	5.4	5.4
Access to public transport	8.9	5.4	7.6	7.7	7.4
Column n	16	238	81	52	29

King William Road is highly rated for it's convenience and quality of businesses.

All rated King William low for parking. Businesses and residents believe there is good access to public transport, where visitors do not.

Which of the following would be the 3 most important areas for improvement?

%	Businesses	Visitor	Phone	Local region	Wider region
Mix of Businesses	10	59%	40%	42%	38%
Street Scaping	4	50%	22%	23%	20%
Parking	8	46%	66%	63%	68%
Roads	1	39%	22%	21%	23%
Footpaths	2	32%	25%	20%	30%
Quality of businesses	2	31%	13%	18%	8%
Vibrancy	8	29%	29%	29%	29%
Convenience of location	1	8%	5%	1%	9%
Ease of finding businesses	3	5%	18%	12%	25%
Access to public transport	1	2%	11%	8%	14%
Column n	16	238	169	90	79

Three priorities for visitors are the mix of businesses, street scaping and parking. The priorities for residents are parking, mix of businesses and vibrancy. Businesses would like to see a better mix of businesses, better parking and more vibrancy.

How would you rate King William Road in the following areas?
Please use a 0-10 scale where 10 is extremely satisfied and 0 is extremely dissatisfied?
[PHONE SURVEY]

%	King William Road	Burnside Shopping Centre	Rundle Mall	Parade Norwood	Mitcham Square	None of these
Good variety of cafes, restaurants	54%	12%	13%	44%	9%	7%
Good place to meet friends and family	47%	28%	18%	31%	19%	11%
Good place for walking and browsing	46%	25%	24%	26%	11%	11%
Good atmosphere	42%	37%	25%	37%	23%	9%
Gift stores	37%	33%	34%	23%	18%	11%
Hair and beauty	34%	18%	12%	14%	12%	35%
Old fashioned	29%	3%	5%	14%	5%	37%
My local street	27%	8%	2%	9%	11%	35%
My favourite place	25%	14%	10%	18%	10%	25%
Retail shopping	23%	41%	50%	20%	14%	11%
Health and wellbeing businesses	19%	9%	7%	12%	10%	31%
Professional services	16%	5%	11%	12%	7%	41%
Convenience stores	16%	8%	13%	12%	16%	33%
Thriving	14%	29%	19%	33%	14%	14%
Modern	12%	54%	16%	11%	27%	16%
Good parking	9%	53%	7%	12%	45%	10%
Grocery shopping	3%	18%	3%	19%	44%	29%
Column n	156	145	128	124	125	156

Consideration is being given to replacing the surface on the road and footpaths
Which of the following would you prefer?

Column %	Businesses	Visitor	Phone	Local region	Wider region
Pavement	9	55%	51%	52%	50%
Printed bitumen	5	19%	6%	6%	6%
Bitumen	1	14%	29%	26%	32%
None of these	1	7%	5%	5%	4%
Don't know	0	6%	10%	11%	8%
Column n	16	231	177	93	84

The current pavement is still the preferred surface of the road,

What are the reasons you do not visit King William Road, more often?

Column %	Phone	Local region	Wider region
Go elsewhere	26%	13%	35%
Not close enough	26%	7%	39%
Doesn't have what I need	16%	7%	22%
Parking	13%	0%	22%
Not my style	5%	13%	0%
Too expensive	5%	0%	9%
Don't go out much	5%	7%	4%
Other - specify	32%	53%	17%
Dont know	11%	13%	9%
Column n	38	15	23

Other specify:

- lost all character and so many empty shops so not very inviting
- too many vacant spaces
- not a shopper
- too far for me to walk
- lack of variety
- no variety of fashion eating places very basic
- a bit out of the way for me
- not atmosphere
- more to choose from at other locations
- no vibrancy
- we are very close to Burnside and its easier to go there
- time and more variety needed

Which of these shopping precincts do frequently visit?

Column %	Phone	Local region	Wider region
Rundle Mall / Rundle Street	49%	44%	53%
Unley Road	46%	63%	29%
Burnside Shopping Complex	44%	38%	50%
Mitcham Square	42%	40%	44%
Parade Norwood	38%	26%	49%
Jetty Road Glenelg	10%	9%	11%
Other - specify	16%	10%	22%
None	4%	6%	1%
Column n	200	100	100

Other specify:

Local region:

- King William Road [x5]
- Goodwood Road [x4]
- Arkaba Frewville
- Castle plaza
- Marion

Wider region:

- Arkaba Frewville [x7]
- Goodwood Road [x3]
- North Adelaide
- Castle plaza
- Pasadena

Have you seen any promotions from King William Road?

Column %	Visitor	Phone	Local region	Wider region
Yes	40%	22%	22%	21%
No	55%	76%	76%	76%
Don't know	5%	2%	2%	2%
Column n	233	176	92	84

Where did you see / hear the promotions?

Column %	Visitor	Phone	Local region	Wider region
Signage	55%	18%	20%	17%
Posters	6%	26%	35%	17%
Newspaper / Local paper	36%	39%	35%	44%
Leaflets	13%	16%	20%	11%
Brochures	13%	11%	10%	11%
Online	17%	5%	5%	6%
Social media	23%	5%	5%	6%
Other [specify]	6%	13%	15%	11%
Don't know	13%	5%	5%	6%
Column n	94	38	20	18

- Banners [x2]
- Radio
- Bunting across King William Rd at the city end
- Cibo

What would make you visit King William Road more often?

Column %	Visitor	Phone	Local region	Wider region
Nothing - fine as is	36%	5%	9%	0%
Variety of shops	18%	46%	47%	45%
Accessibility / Parking	11%	14%	13%	16%
Specific shops	8%	6%	7%	5%
Street scaping / road	6%	7%	11%	3%
Bars / night life / events	6%	4%	3%	5%
Traffic / pedestrian	5%	3%	3%	3%
Other	10%	15%	8%	23%
Column n	233	38	20	18

A third of visitors were happy with how King William Road currently is. The major priority is increasing the variety of shops [and adding specific stores].

Role

Count	Business
Owner / operator	6
Manager	9
Employee	1
Column n	16

How long have you owned or managed a business on King William Road?

Count	Business
Less than 12 months	4
1-2 years	2
3-5 years	5
6-10 years	1
11-20 years	0
More than 20 years	3
Prefer not to say	1
Column n	16

What type of business is yours?

Count	Business
Retail	9
Food/beverage hospitality	4
Produce (eg fruit & veg, butcher, grocery)	0
Health	0
Professional services	0
Beauty/personal	3
Column n	16

Visitor and Resident Profile

Gender				
Column %	Visitor	Phone	Local region	Wider region
Male	34%	34%	39%	29%
Female	66%	66%	61%	70%
Gender diverse	0%	1%	0%	1%
Column n	231	200	100	100

Age				
Column %	Visitor	Phone	Local region	Wider region
18-24	7%	4%	3%	5%
25-29	7%	2%	2%	1%
30-39	10%	4%	4%	3%
40-49	14%	19%	21%	17%
50-59	25%	24%	24%	24%
60+	37%	48%	46%	49%
Column n	231	200	100	100

The surveys gathered a mix of respondents. King William Road demographic is skewed towards middle to older aged females.

Household			
Column %	Phone	Local region	Wider region
Young single person living alone	2%	1%	2%
Young couple, living separately	1%	1%	1%
Young couple, living together	2%	1%	2%
Young family, with all children primary school aged or younger	7%	10%	4%
Middle family, with a high school aged child still living at home	21%	21%	21%
Mature family, with all children living at home older than high school age	12%	13%	11%
Mature couple living together	39%	41%	36%
Mature person	17%	12%	22%
Prefer not to say	1%	0%	1%
Column n	200	100	100

The regions are made up of mature people [56%] and families [40%].

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