CITY USER PROFILE '15 ADELAIDE CITY COUNCIL

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What is the City User Profile and why do we do it?

How is CUP data collected?

The City User Population (CUP) Survey is a study of people that are in the City of Adelaide on any given day. By collecting data direct from City users, Council can develop better insight into the types of people that use the City, what they use it for, how often they use it and how the City is perceived by its users. The information can then be used to assist Council in delivering the right mix of services and amenities for all users of the City.

The CUP Survey has been undertaken by Adelaide City Council once every one to two years since 2002. Originally starting out as a customer satisfaction survey, CUP has now evolved to focus on the demographic, attitudinal and behavioural profile of City users and how this has changed over time.

This report presents the key results of CUP 2015.

During May 2015, over 2,000 City users were surveyed using an 'on street intercept' method at numerous locations across the City. City users were randomly approached and asked a number of questions around why they use the City, how often they visit the City and how they travelled into the City on the day. Survey respondents are informed that the City is defined as Adelaide, North Adelaide, the surrounding Park Lands, Adelaide Zoo and the Botanic Gardens. City users were also asked for their opinion on aspects of Council performance, community centre and library usage, perceptions of safety, awareness of Council engagement initiatives, preferred communications methods with Council and perceptions of the City experience. To ensure that information was captured from a range of City users, surveys were conducted at various times throughout the day and night on weekdays as well as on weekends.

Who uses the City?

Residential Location

Of the 2002 users surveyed, 13% lived in the suburbs of Adelaide and North Adelaide, 56% lived in inner metropolitan suburbs¹ and 22% lived in the outer metropolitan suburbs. Approximately 5% of City users came from interstate while 4% came from overseas. The composition of City users in terms of postcode of residence has changed little over the history of CUP.

Age profile

The age profile of City users has largely remained consistent over the history of CUP. Those aged 35 and under continue to make up roughly half of total City users, although this figure has fluctuated slightly over time. In 2015, users aged between 15 and 35 made up 45% of City users while those aged 15 to 24 accounted for 24%. The proportion of 15 to 24 year olds tends to reflect the number of international students that are studying in the City at the time. In 2009 when the number of international students was at a peak, the proportion of City users aged 15 to 24 accounted for 37% of the total. Since 2005, there has been a slight increase in the proportion of City users aged 25 to 34, with users aged between 45 and 54 years decreasing. The age group that experienced the largest increase over the ten years of CUP were the over 65s, which increased from 6% in 2005 to 12% in 2015. The age breakdown of City users is similar to the age profile of residents living in the city but is substantially younger when compared with the age profile of the state.

¹ Defined as postcode areas that falls within a 10km radius of the City.



Figure 0: Age of City users, 2005 to 2015

What are some of the key findings from CUP 2015?

People come into the City mainly for work, to study or to shop

Most people use the City for different reasons at different times

Our green spaces are immensely popular with City users with over half indicating that they visit the Park Lands at least once a year.

Over two-thirds of City users come to the City at least two to three times a week

City users tend to be younger with 45% of those surveyed being under 35 years of age in 2015.

The proportion of City users aged 65 and over has increased steadily from 6% in 2005 to 12% in 2015, reflecting the trend of an ageing population across the metropolitan area.

40% of City users travel to the city by car as a driver or a passenger while 29% travel by bus

The number of people who come to the City to work or to study has been increasing over the past 10 years

54% visit the Park Lands at least once a year

The most popular reason for coming into the city after working, studying and shopping was for dining and entertainment or to meet friends.

50%+ Visit the City daily or most days

2/3+ Feel safe in the City between 8pm and 1am

Overall, why do people use the City?

People use the City for a number of reasons. On any given day, City users could be shopping, working, studying or using the City for recreation and leisure. In CUP 2015, City users were asked to identify all the reasons for using the City at any time and not just on the day of the survey. Some City users listed up to five different reasons for using the City.

By far, the most popular reason for visiting the City was for shopping with 85% of users indicating that they shop in the City at least once a year. Other popular reasons for coming to the City include visiting the Park Lands (54%) and for work (35%). A significant number of users (69%) said that they used the City for reasons other than those listed.

One in five respondents said that they came into the City to study either as a university or post-secondary student. A small proportion of the City users surveyed also lived in the City (13%) while 9% identified themselves as a tourist or a visitor staying in short-term accommodation.

The mix of City users has mostly remained consistent over the history of CUP with around one third of users being in the City for work, one fifth for study, 13% residents and around 10% visitors or tourists. This shows that the City continues to provide users with a good variety of work, study and leisure options.

Looking at the CUP results over time, there has been a surge in the proportion of university and post-secondary students in the City, rising from 5% in 2003 to 21% in 2015 with the latest results being at a similar level to the peak achieved in 2009 of 22%. This increase is likely to be driven by the growth in international student numbers at the national level during 2013-14, which was at its highest level since 2008-09. Other factors that could have contributed to the boost in student numbers include the relative decline of the Australian dollar over the past six to twelve months² and federal government policy changes to streamline the international student visa application process.³

In contrast, the percentage of secondary students using the City has mostly remained stable at one to two percent since 2003. However, this figure is expected to change in the future with the establishment of the new high school within the City in the next few years.

Questions around Park Lands use were introduced in 2007 and since that time, there has been an upward trend in the proportion of people that use the Park Lands. While Park Land usage dipped slightly in 2015 to 54% from 61% in 2013, the overall movement over the past few years remains positive.

Shopping continues to be a popular activity with 85% of city users coming into the City to shop at least once a year in 2015, which is consistent with the long term average. Over the past ten years, while the numbers has fluctuated slightly, there has been a modest but noticeable increase in the proportion of City users that list shopping as one of the many reasons for coming into the city. Since 2009, close to 90% of city users would on average, shop in the city at some point in time.

² Historical daily exchange rates of the Australian dollar 2010 to 2014, Reserve Bank of Australia, http://www.rba.gov.au/statistics/historicaldata.html#exchange-rates

³ 'Student visa and temporary graduate visa programme trends: 2006-07 to 2013-14', Department of Immigration and Border Protection, http://www.border.gov.au/ReportsandPublications/ Documents/statistics/student-visa-programme-trends-2013-14.pdf



Figure 1: Reasons for using the City (general, % of total respondants) - note that multiple answers can be chosen



Figure 2: Selected City usage - 2006, 2009, 2012 and 2015 (% of respondants)

Overall, how often do people use the City?

In general, most City users were frequent users of the City with over half reporting that they came to the City daily or most days of the week. Another 13% said that they visit the City about two to three times a week and 8% said that they came into the City weekly. In 2015, 3% of City users said that this was their first visit to the City.

Those that lived in the City, worked in the City or studied in the City were the most frequent users with more than 80% coming into the City daily or on most days of the week.



75%

of respondants said they were in the City at least once a week (54% daily)



Figure 3: Frequency of City use

What is the main reason for using the City today?

In addition to asking why people use the City at any given time, City users were also asked about the one main reason for using the City on the day of the interview. Just under a third of City users surveyed said that they were in the City mainly for work while one in five said that their main reason was shopping. City users who were in the City mainly to study or to meet friends on the day of the survey each accounted for 13% of total users.

Similar to previous CUP results, working and shopping continue to be the main reasons for using the City on the day of the survey. While working has consistently been a popular main reason for being in the City, shopping is still a popular secondary reason. Ongoing promotion of the City retail offer and other activity associated with the implementation of Council's recently endorsed Retail Strategy may influence the number of City users citing shopping as either the primary or a secondary reason for using the City in the future. The proportion of City users that come here mainly for study has increased over the history of CUP. In 2004, 9% of city users quoted 'studying' as the main reason for being in the City compared to 13% in 2015.

The proportion of users who come into the City mainly for work has grown over time as have the proportion of those visiting the City mainly to meet friends, although to a lesser extent.

30% to work 21% to shop 20% to meet friends / dining / entertainment 13% to study

the City on the day of response



Figure 5: Main reason for visiting the City, 2003 to 2015

How often do people use the City for the main reason?

After identifying the main reason for using the City on the day of the interview, users were then asked how often they came into the City for that reason, not surprisingly, those who came into the City mainly for work or study were the most frequent users with over three-quarters visiting daily or most days of the week. City users who came into the City mainly to visit a library or for sport and recreation also did so on a regular basis with 40% to 50% coming into the City at least two to three times per week.

People who were meeting friends or coming into the City for shopping as their main reason were more likely to do so about once a week. Users who stated that they were mainly in the City for entertainment or dining out purposes were more inclined to visit once every few months. Respondents whose main reason for coming into the City was for personal business tend to visit the City the least.

In 2015, 38% of all City users came into the City daily or most days of the week for their main reason. This is less than 46% reported in 2012 but is higher than the 32% reported in the 2013 results. Over time, the proportion of users visiting the City one to three times a week has largely remained the same while those visiting between 1 and 6 times a year has increased.





Figure 6: Frequency of visiting for main reason (2015)



Figure 7: Frequency of visiting for main reason (2012,2013 and 2015 comparison)

Apart from the main reason, why else do people use the City?



After asking users for their main reason for being in the City, CUP then asked if there were any other reasons for being in the city on the day of the survey. According to the results, two-thirds of users said that they came into the City for more than reason on the day. This supports the view that the City has a range of offerings and services for a variety of users. The most popular secondary reasons for coming into the City were dining and entertainment (36%), meeting friends (29%) and shopping (28%). Those living in the City were more likely to be in the City for personal business compared to overall City users while those studying in the City were more likely also to be shopping, particularly in Rundle Mall. Over time, there has been an increase in the proportion of users who come into the City for dining and entertainment as a secondary reason as well as those who come into the City to meet friends. This growth may be associated with concerted activity around growing the evening economy.

There has also been a marked increase in the proportion of City users that listed sport and recreation as a secondary activity when visiting the City. This is consistent with the current health trends towards individual physical activity, increased demand for health-related information, products and services and greater social pressures such as weight management, social interaction and enjoyment that influence participation in physical activity. It also coincides with the increased usage of the Park Lands by City users over the past few years.

36% dining / entertainment

28%

33% main reason only

9% for sports / rec 29% to meet friends

4% study / visit a library

Figure 8: Secondary reasons for visiting the City (%of respondants)



Figure 9: Secondary reasons for visiting the City (%of respondants) 2003 to 2015 comparison

How do people get to the City?

City users were asked how they travelled to the City on the day of the interview and could list more than one mode of transport. The most popular way of getting into the City was by car as a driver with 31% of respondents reporting this as one of the ways in which they travelled to the City. Other popular modes of transport to the City include by bus (29%) and walking (19%). Residents and visitors were more inclined to walk to the City while City workers were more likely to drive in. Around one in ten City users caught the train in the City or came into the City as a passenger in a private vehicle. A small proportion of city users (3%) also listed cycling as one of the ways of getting to the city with residents being more

31%

car - as driver

Figure 10: Travel into the City, 2015

likely to cycle (5% of city residents) in comparison to the overall city user population.

Over time, there has been an increased tendency to use public transport to travel into the City, which has been matched by a gradual decline in the use of cars. The use of non-motorised transport such as walking and cycling and other private transport has largely remained steady over the past ten years. Campaigns such as 'Active Ambassadors' as well as ongoing measures to increase the safety and convenience of walking and cycling within the City is likely to have led to greater uptake of nonmotorised modes of transport for City users.

train

19%

walk



bus

Figure 11: Travel into the City, 2006 to 2015 compared

How often do City users exercise in the City?

City users were also asked about how often they undertook 30 minutes of moderate to vigorous physical activity in the City. Over 60% of City users said that they did not undertake 30 minutes of moderate to vigorous physical activity in the City. Only 8% of City users said that they did so daily or on most days of the week while another 10% said that they undertook 30 minutes of activity two to three times a week. Compared to overall City users, City residents and City workers were more likely to be active in the City and be undertaking physical activity at least two to three times a week.

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Most days - daily/most days/two-three times a week Weekly - once a week/two-three times a month 53.4%

active most days

14.9% of residents are active weekly

23.9%

active most days

9,7% of workers are active weekly



How safe do City users feel in the City?

Questions on the perception of safety in the day and at night have been included in some previous CUP surveys. In 2015 the question was altered to better align with the Good Evening Adelaide Strategy. City users were asked for their perception of safety in the City at various times:

- In general, how safe or unsafe do you feel in the City before 8pm?
- In general, how safe or unsafe do you feel in the City between 8pm and 1am?
- In general, how safe or unsafe do you feel in the City after 1am?

City users felt the safest in the City before 8pm with 98% of respondents reporting that they feel 'very safe' or 'quite safe'. When asked about how safe they felt being in the City between 8pm to 1am, this proportion decreased though 65% of users still felt safe in the City at that time. Residents were more likely to report feeling 'very safe' during this time while City workers were more likely to feel 'quite safe' when compared to overall City users.

When City users were asked how safe they felt after 1 am, over half of the respondents stated that they did not use the City at that time. Of those who reported using the City after 1 am, more respondents reported feeling safe (60%) than unsafe (40%).



Figure 12: Safety in the City

What do users think of the City experience?

In CUP 2015, users were also asked on their experience of events, arts, culture and festivals within the City. City users were asked the extent to which they agreed with the below statements. A score of zero meant that the respondent strongly disagreed with the statement while a score of ten meant that they strongly agreed.

Most respondents agreed with all three statements with more than two-thirds of City users giving a score of 7 or more. Of the three comments, the statement around the City being 'filled with festivals, events, activities, for all ages and backgrounds throughout the year' had the lowest proportion of scores greater than 7 (69%) and the highest proportion scores less than three (4%). This reflects the widespread sentiment that events and festivals within the city tend to be centred on certain periods during the year and was consistent across City workers, City residents and City students. City workers and weekend users had the lowest proportion of users providing a score of higher than 7 for this at 66% and 68% respectively. These results suggest that there may be a need to better promote the artistic and cultural experiences available in the City and encourage events and festivals throughout the year.

84%

agreed to strongly agreed that the City has great places for people to enjoy events, activities, art and culture

78%

agreed to strongly agreed that thriving arts, cultural, and creative industries and events, are in the City

agreed to strongly agreed that the City is filled with festivals, events, activities, artistic and cultural experiences for people of all ages and backgrounds throughout the year

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