

A nighttime photograph of a city street. In the foreground, a tram is blurred as it moves across the frame. A group of people is waiting on a tram stop platform. In the background, a large, ornate building with many windows is lit up. A tall, modern building is visible behind it. The sky is dark blue.

CITY USER PROFILE SURVEY 2016



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Executive Summary

Adelaide City Council (ACC) conducts the City User Profile Survey once a year to obtain the latest 'snapshot' of the people that are in the City on any given day. Information on why people are in the City, how often they visit and how they have travelled to the City on the day is collected through random on-street interviews across the City and North Adelaide. Demographic information such as age, household type, occupation and place of residence is also collected so that Council can get a better understanding of the types of people that visit the City. Questions around perceptions of safety in the City, physical activity, and satisfaction with the artistic and cultural vibrancy of the City are also asked.

In 2016, over 2,000 people were surveyed during the day, in the evenings and on weekends to ensure a good representation of all city users. Of the 2,004 people surveyed:

- 14% lived in the City or North Adelaide City Council ('city residents')
- 36% were 'city workers'
- 21% were 'city students'
- 43% were in the City for entertainment or leisure ('city visitors').

In addition:

- People were mainly in the City for work, followed by shopping and studying
- 57% of people coming into the City lived in the inner suburbs
- Half of people surveyed said that they came into the City daily or most days of the week
- Driving and catching a bus were the most popular methods of travelling to the City
- The large majority of city users felt 'safe' or 'very safe' in the City during the day
- 42% of city users strongly agreed with the statement that 'The City has great places for people to enjoy events, activities, art and culture.'

ACC has conducted city user surveys since 2002 when they originally started out as a customer satisfaction survey. Over time, these surveys allow Council to identify trends and changes in patterns of city usage.

Data over the last ten years of surveys showed that:

- The main reasons cited for visiting the City continues to be for work or to shop
- The inner suburbs continues to be the largest source of city users
- The age composition of city users has been relatively consistent over time with under 35s being the largest age group
- There has been a gradual shift away from using cars to travel to the City to more environmentally transport modes such as public transport and walking or cycling.



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

The City User Profile (CUP) Survey is Adelaide City Council's annual collection of data from people who visit the City. The data is collected to get a better understanding of the types of people that are there on any given day, their reasons for being in the City, and how often they visit the City. This information helps identify any changes to city usage over time, and provides the evidence-base for Council to ensure that its services meet both the current and future needs of City users.

This report provides the latest snapshot of city users in 2016. It also draws on previous CUP surveys to highlight the changes in city user groups over the past decade. As well as informing program planning and decision-making, the data collected in the CUP will be used to help to monitor the progress of the *City of Adelaide 2016-2020 Strategic Plan* to ensure that the City achieves its vision that 'Adelaide is a welcoming and dynamic city full of rich and diverse experiences'.

How is the survey conducted?

The CUP collects information from over 2,000 users using a random intercept method where people are interviewed on-street at a number of different locations across the City and North Adelaide. To ensure a good representation of city users, interviewing took place at different times of the day and in the evening, on weekends as well as on weekdays over two weeks in May.

In 2016, the survey was trialled in other languages – Mandarin Chinese and Italian. Delivering the survey in languages other than English was an effort to capture information from city users who may have previously been unable to participate due to language difficulties.

Number of responses:	total n=2,004 (n=1,992 in English, n=12, paper survey in Mandarin Chinese)
Fieldwork:	23 April – 16 May 2016
Margin of error (95% C.I.):	+/- 2.2%

ACC has conducted city user surveys since 2002 when they originally started out as a customer satisfaction survey. In the past, surveying was conducted over the phone with a sample from the metropolitan Adelaide area. In 2012, the surveying methodology was changed to an on-street intercept to better capture a snapshot of people who were physically in the City during surveying, as well as to reflect a reduction in the use of landline phones.

Who are our City users?

A city user is anyone who comes into the City for any reason and typically falls into one of four main categories:

- city residents – people who live in the suburbs of Adelaide or North Adelaide
- city workers – people who work in the City
- city students – people who study in the City
- city visitors – people who neither work, study nor live in the City and usually visit for leisure or entertainment.

With the exception of city visitors, people who are in the City may identify with more than one user group.

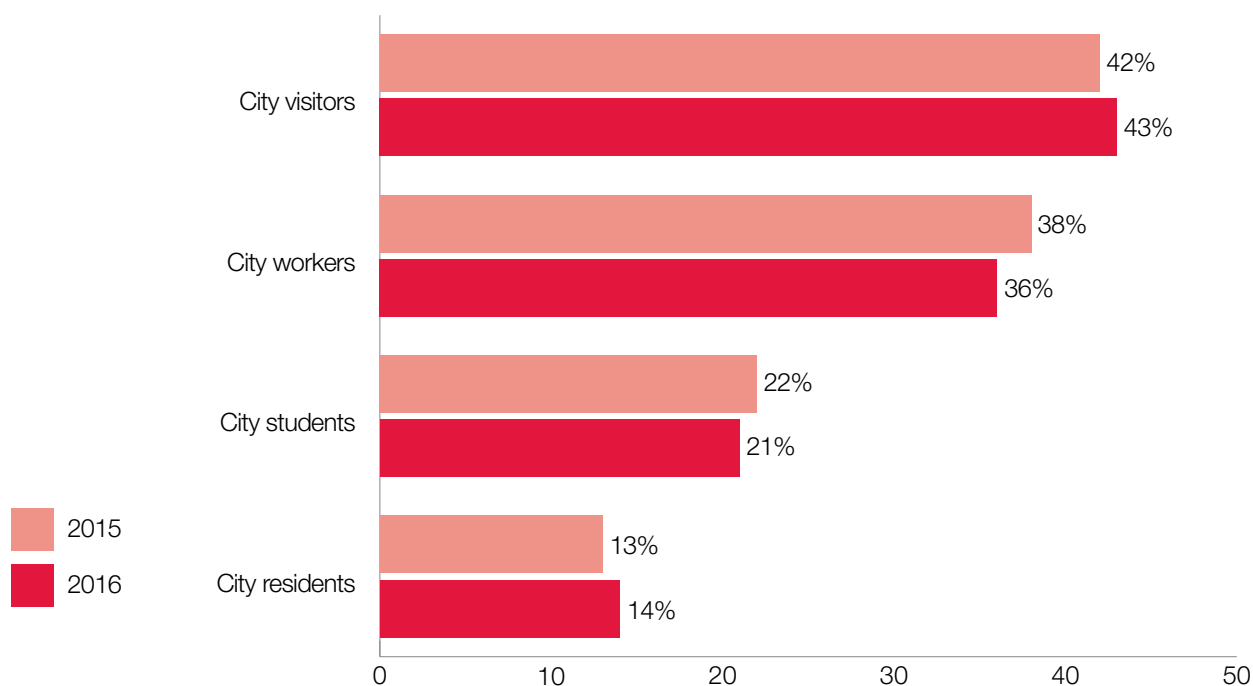
In 2016, city visitors were the largest group of city users followed by workers, students and residents. This is largely consistent with the composition of city users in 2015.

In addition to the four main user groups, the survey also looks at city users who visit the Park Lands, shop in the City, visit for leisure and entertainment or visit the City in the evenings (after 5pm).

According to the results, just over half of city users visited the Park Lands at least once a year, 76% visited the City in the evenings and 87% shopped in the City at least once a year. A small number of city users (8%) were tourists or visitors staying in short-term accommodation and were usually from interstate or overseas.

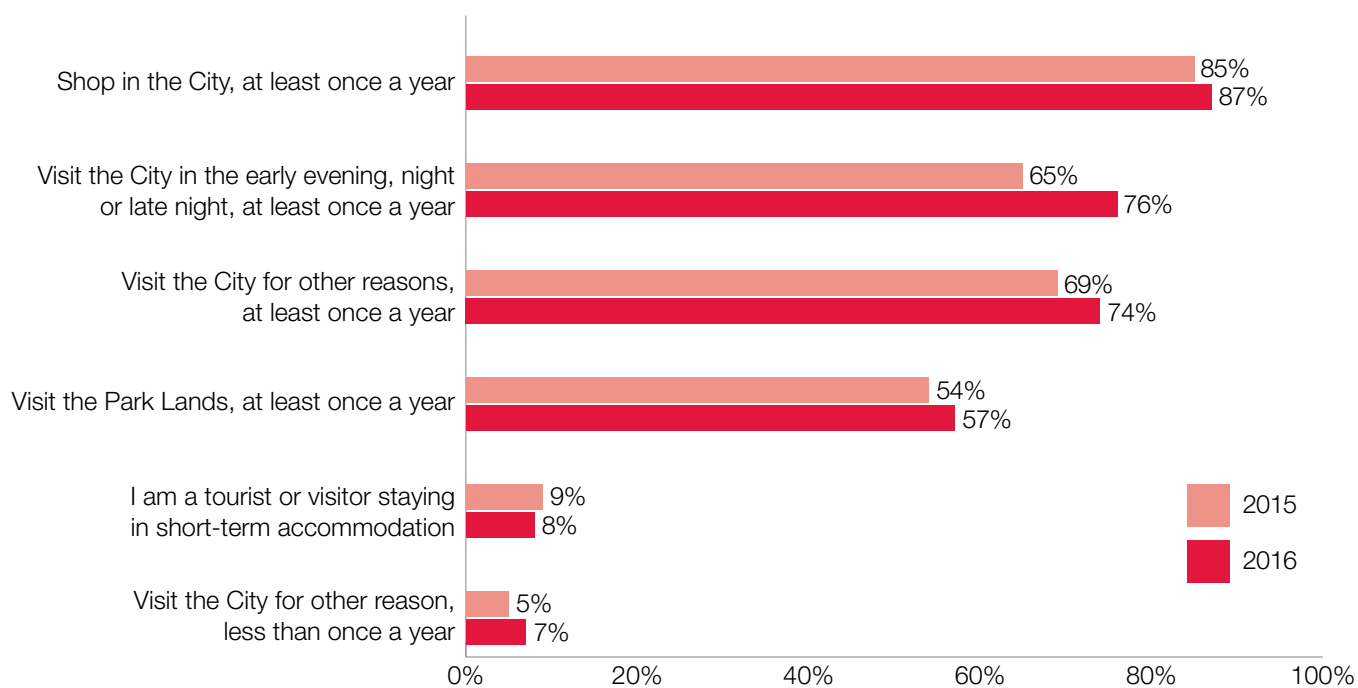


Figure 1: City users by main categories - comparison



Base: 2016 (n=2004); 2015 (n=2002).

Figure 2: City users by other categories - comparison



Base: 2016 (n=2004); 2015 (n=2002).

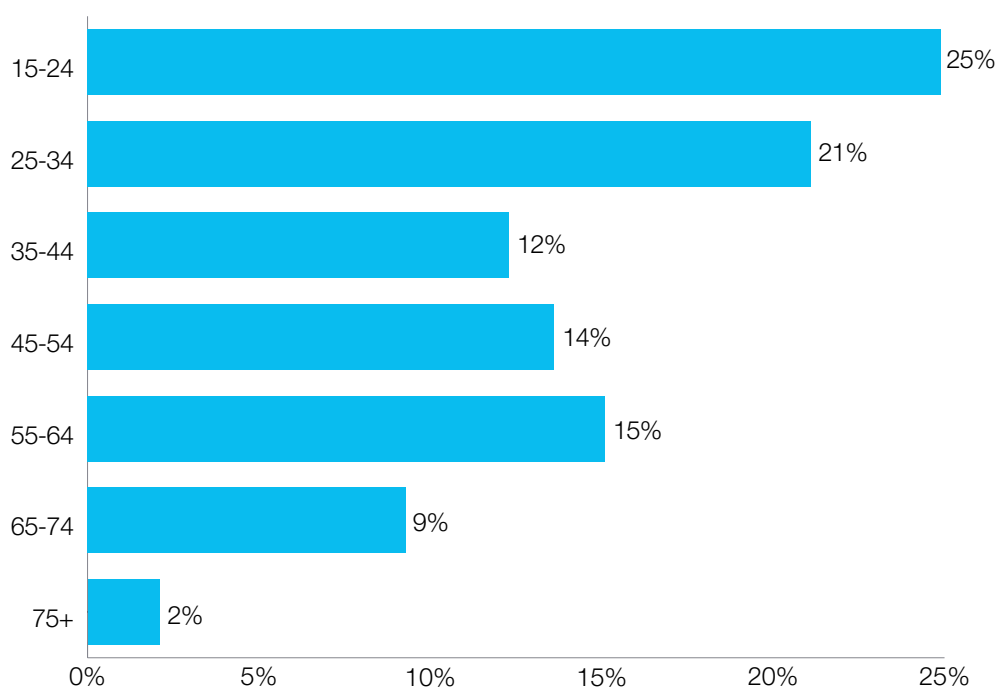
Question: Why do you visit the City? (at any time, not just today).

How old are City users?

City users tend to be young with one in four aged between 15 and 24 and one in five aged between 25 and 34. These two age groups combined account for nearly half of the total city user population and is consistent with the findings of previous surveys. The next largest age group was 55 to 64 year olds accounting for 15%, followed by 45 to 65 year olds, accounting for 14%.



Figure 3: City users by age 2016



Base: 2016 (n=1978)

City students were likely to be younger with 90% aged 34 and under compared to 46% of the overall city user population. In contrast, city visitors were likely to be older with just over one-fifth aged 55 to 64 and 16% aged 65 to 74.

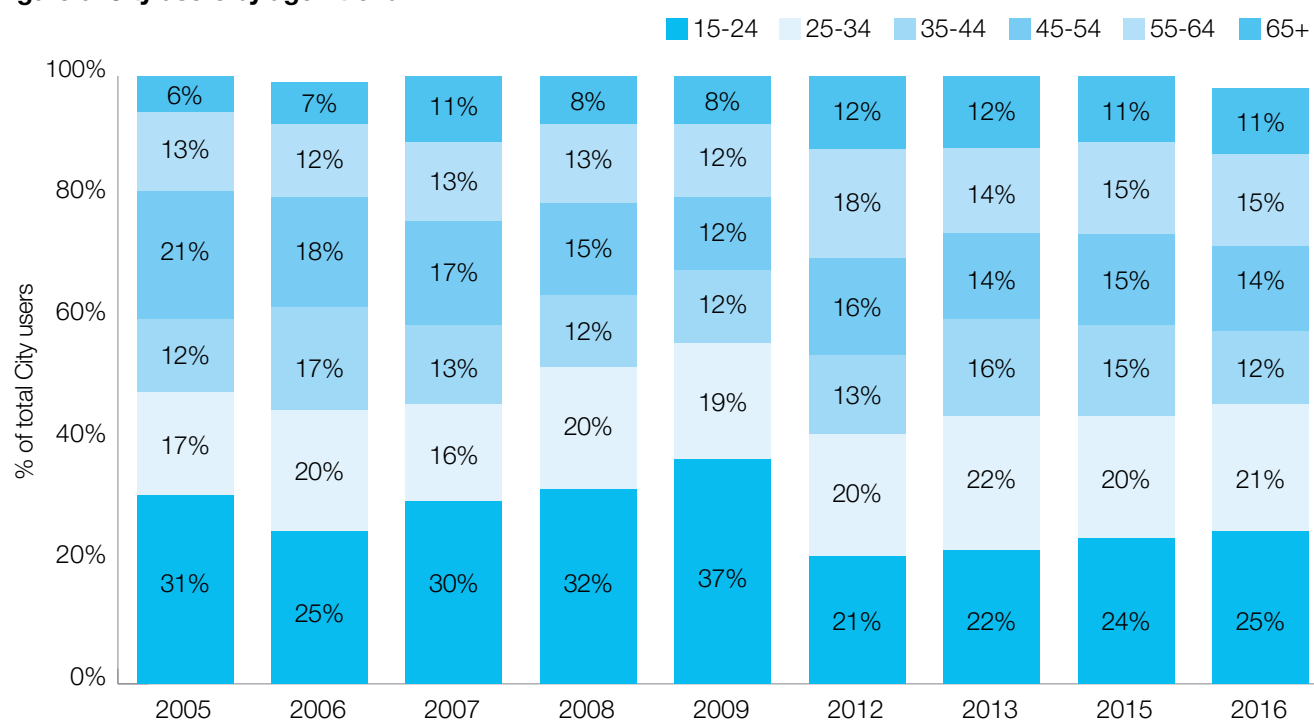
Figure 4: City users by type and age 2016

	City residents		City workers		City students		Visitors		All City users	
Under 34		49%		46%		90%		31%		46%
35-44		11%		19%		5%		11%		12%
45-54		11%		18%		2%		15%		11%
55-64		11%		13%		1%		22%		15%
66-74		11%		3%		0%		16%		9%
75+		3%		0%		0%		4%		2%
Refused		2%		2%		1%		1%		1%
NET		100%		100%		100%		100%		100%

Base: 2016 (n=2004)

Since 2005, the age breakdown of city users has mostly been unchanged with younger people making up the largest group of users. Although this proportion has fluctuated over time particularly within the 15 to 24 age group, people under the age of 35 remain one of the main user groups of the City.

Figure 5: City users by age - trend



Similar to other cities in Australia, Adelaide has a sizeable international student population, which is reflected in the composition of its city users. When the number of international student enrolments reached historically high levels across the state in 2009, the number of city users aged 15 to 24 also peaked, accounting for 37% of all users at this time¹. While we are yet to see the same levels of younger people in the City, the proportion of 15 to 24 year olds in the City has been gradually increasing since a downturn between 2009 and 2012.

Other notable changes in the age structure include a fall in the proportion of city users aged 45 to 54 as well as a rise in the proportion of those aged over 65. Both of these changes could be attributable to the wider demographic changes across the population of metropolitan Adelaide².

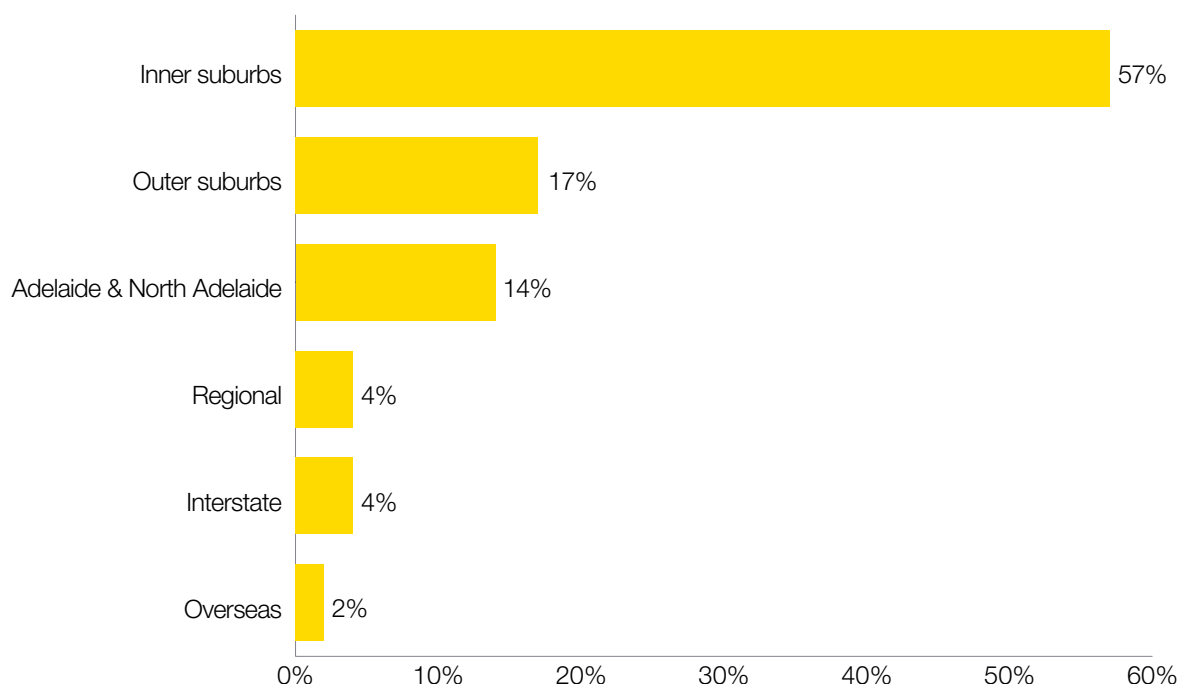
¹ Department of Education and Training, uCube – Higher Education Data Cube, <https://www.education.gov.au/ucube-higher-education-data-cube>

² Metropolitan Adelaide refers to the Greater Adelaide statistical area as defined by the Australian Bureau of Statistics. Between 2001 and 2014, the proportion of those aged 45 to 54 (as a percentage of the population aged 15+) fell from 17.4% to 16.3% while the proportion of those aged 65+ rose from 17.9% to 19.6% (ABS Stat, ERP by SA2, 2001 to 2014).

Where do City users live?

Three-quarters of city users live in the metropolitan Adelaide area with over half living within a 10 kilometre radius of the City and another 17% living in the outer suburbs. 14% live in Adelaide or North Adelaide and around 10% of users came from regional South Australia, or were from interstate or overseas.

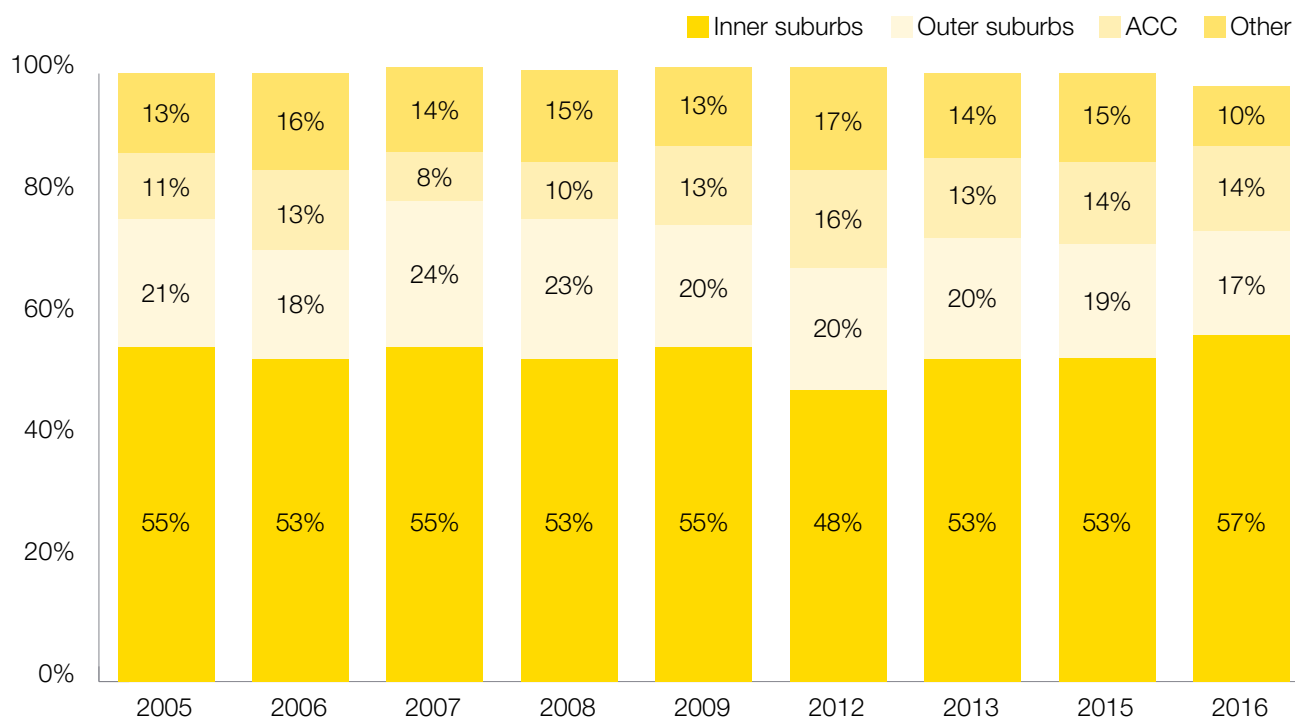
Figure 6: City users by place of residence 2016



Base: 2016 (n=1996)

Compared with 2015, there has been a slight decrease in the number of city users who live in the outer suburbs (from 19% to 17%) and a larger but not significant increase in the number of users living in the inner suburbs (from 53% to 57%). This may reflect the relative ease of access to the City from the inner suburbs. The proportion of people living in the City is the same as last year at 14% while the proportion of City users who live in regional South Australia, interstate or overseas has fallen over time (from 13% to 10%).

Figure 7: City users by place of residence - trend



Why do people come into the City?

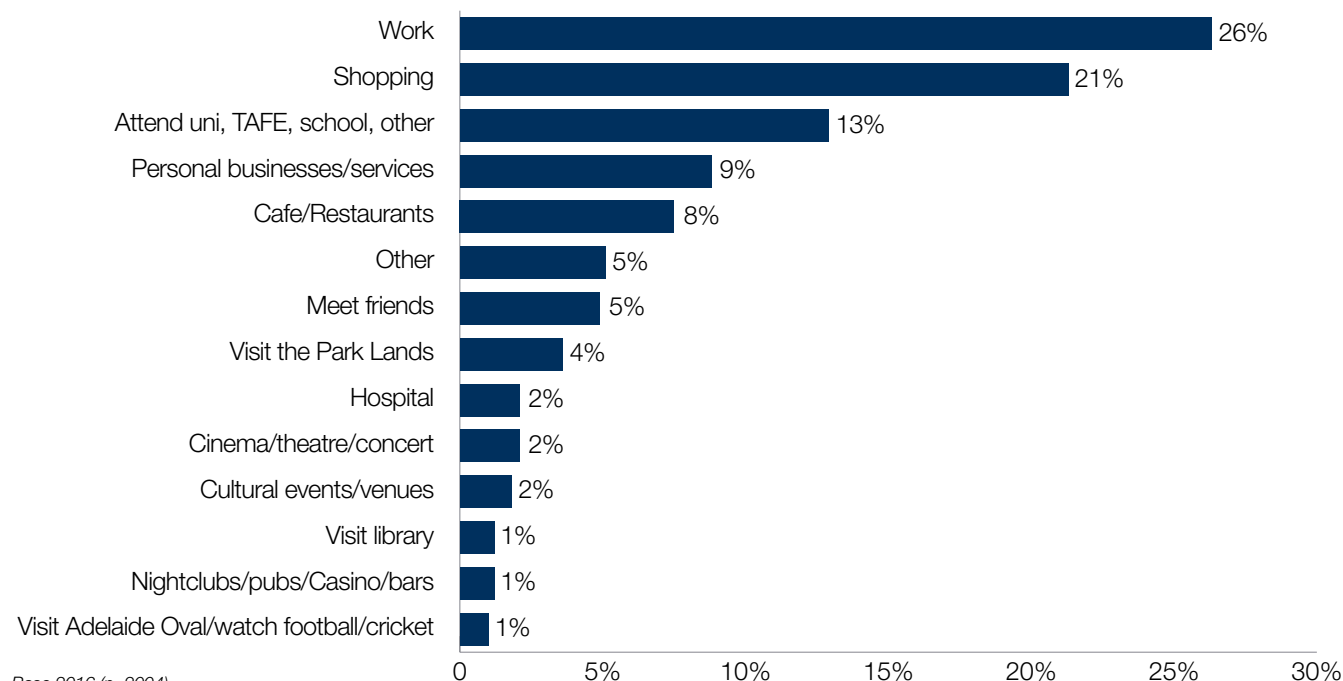
The wide range of offerings available in the City means that people come to the City for a variety of reasons and is reflected in the mix of city users on any given day. While the City has its appeal as a place to live, study and shop, the main reason for coming into the City was to work³.

In 2016, one in four City users reported that their main reason for being in the City on the day of the survey was for work, while one in five said they were in the City mainly for shopping. Other popular reasons for people coming into the City include for study (13%) and for personal business or services such as banking or appointments (11%). Some of the 'other' main reasons for coming into the City include for jury duty, volunteering, picking up or dropping off someone, sightseeing and going for a walk.

3 Includes those who work elsewhere but visit the City for business



Figure 8: Main reason for visiting the City 2016



Base 2016 (n=2004).

Question: What is the main reason you are in the City today?

The main reason for coming into the City has seen little change since 2004. Most users continue to come in for work or to shop, highlighting the strength of the City as a retail and employment centre. While the number of people coming to the City mainly for work has remained steady, there has been a modest downward trend in shopping over time. In 2004, the proportion of city users that came in mainly to shop was 26% compared to 21% in 2016. This decline is likely to be due to the uncertainty of economic conditions post-GFC where households are saving more and spending less, particularly on goods such as clothing and footwear⁴. Online shopping may also be having an impact. On the other hand, there has been a slight increase in the proportion of city users who come in for other reasons. For example, the number of people who came into the City mainly for study rose from 9% in 2004 to 13% in 2016 while the proportion coming to the City mainly for sport and recreational activities increased marginally from 3% to 5%.

Figure 9: Main reason for visiting the City - trends



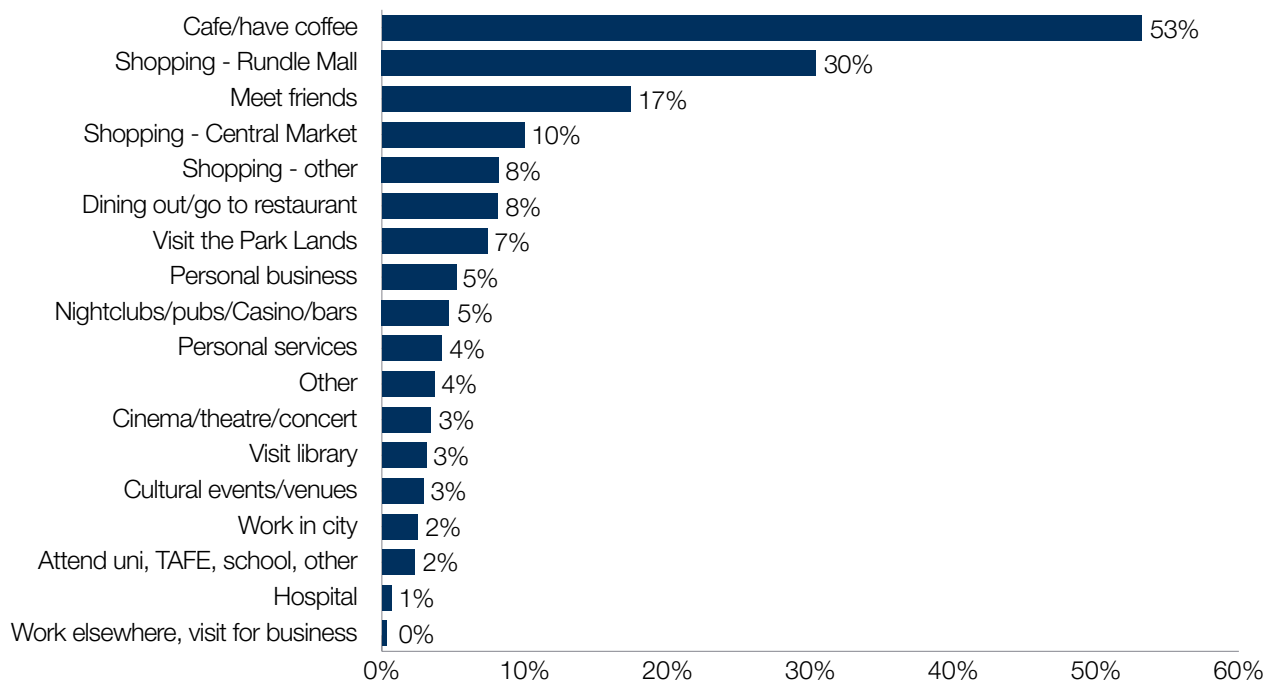
Base 2016 (n=2004). Question: What is the main reason you are in the City today?

4 Lowe, P (2011), 'Changing patterns in household saving and spending', Address to the Australian Economic Forum, Sydney, 22 September.



In 2016, 81% of city users said that they came into the City for more than one reason, an increase from 67% in 2015. Of those, over half said that they were also going to a café or having a coffee, while 30% said they were here to shop in Rundle Mall and 17% were in the City to meet friends.

Figure 10: Other reasons for visiting the City 2016



Base: 2016 (n=1624).

Question: What else, if anything, have you done, or will you do, while you're here?

In addition to studying, city students were likely to be visiting a library, meeting friends or shopping in Rundle Mall, while city residents were more likely to be shopping or carrying out personal business or services. City visitors were more inclined to be dining out or going to culture events or venues in addition to shopping in the City.

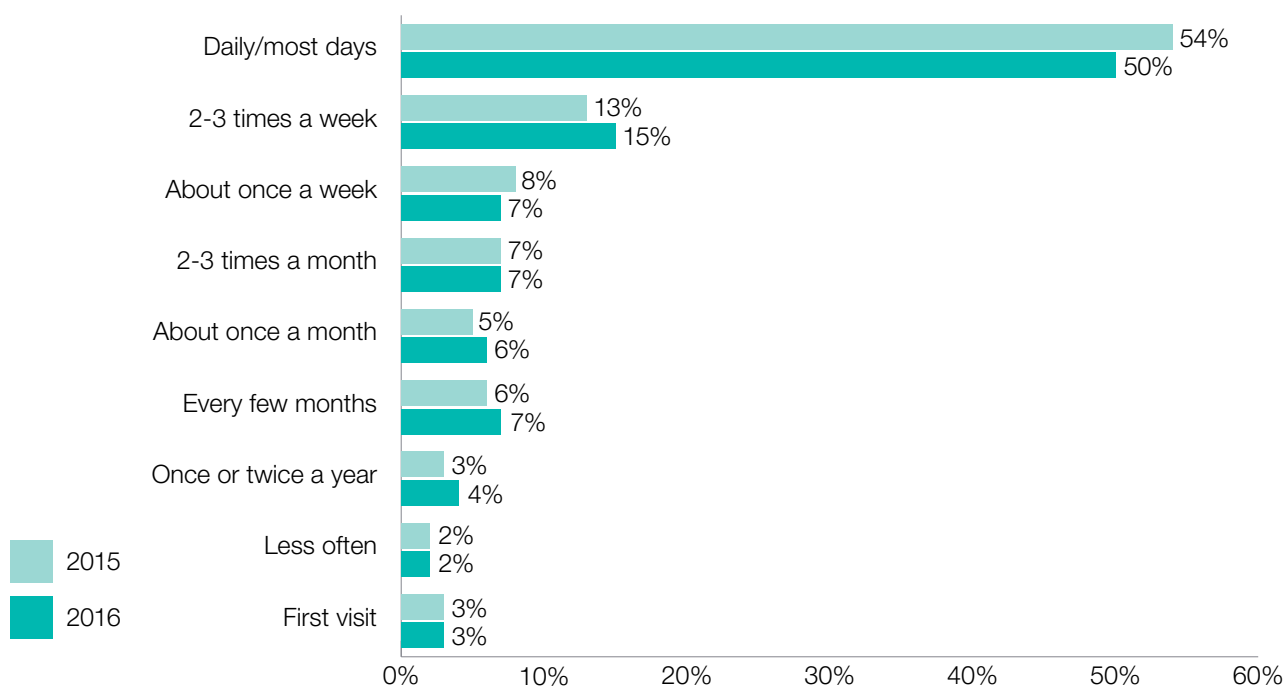
How often do people visit the City?

On average, every second person surveyed came into the City daily or most days of the week. City residents, city workers and city students were more likely to be in the City more frequently than city visitors.

Compared with 2015, the number of city users who were in the city daily/most days decreased slightly (54% to 50%) while city users who were visiting two to three times a week or once every few months, increased slightly. For all other frequencies, the proportion of city users visiting remained largely unchanged from the previous year.



Figure 11: Frequency of visiting the City - comparison



Base: 2016 (n=2004), 2015 (n=2002)

City users who were in the City daily or most days were more likely to walk or catch the bus while those coming into the City a couple times a month or once every few months were more likely to drive. Walking was the most popular option for city users who visited the City less than once or twice a year or were in the City for the first time and were usually tourists who are staying in the City.

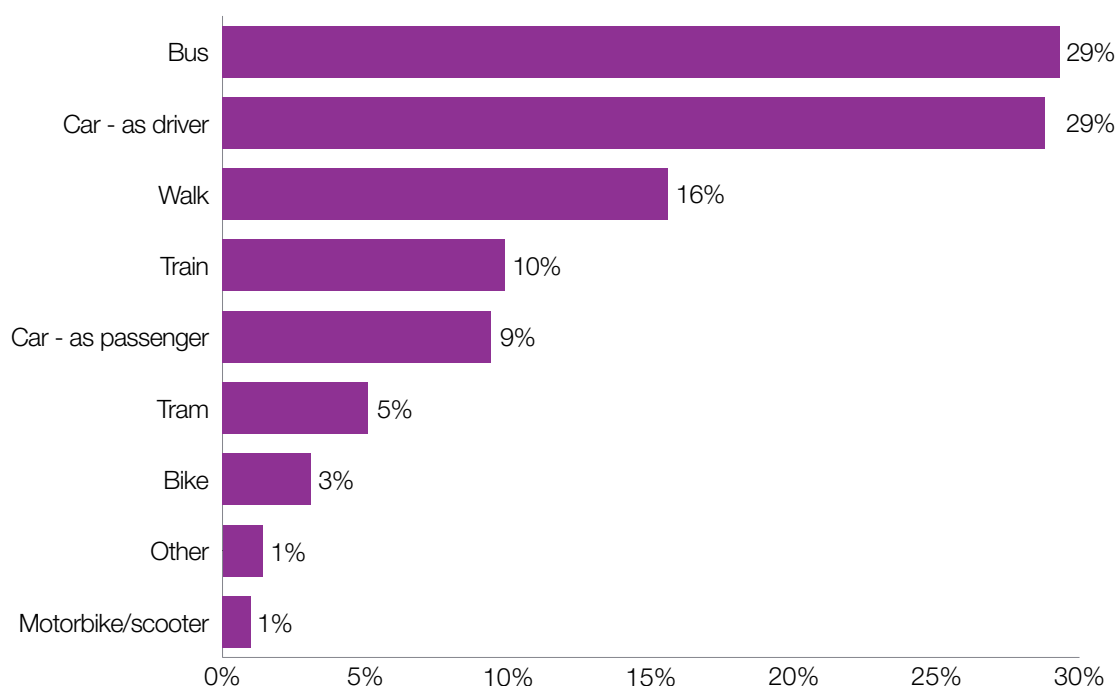


How do people travel to the City on the day?

In 2016, catching a bus and driving were the two most popular modes of travel into the City. An equal proportion (29%) of city users caught the bus or drove into the City on the day they were surveyed. The next most popular transport option was walking, which accounted for 16% of all city users followed by catching the train (10%).



Figure 12: Travel mode to the City 2016



Base: 2016(n = 2004).

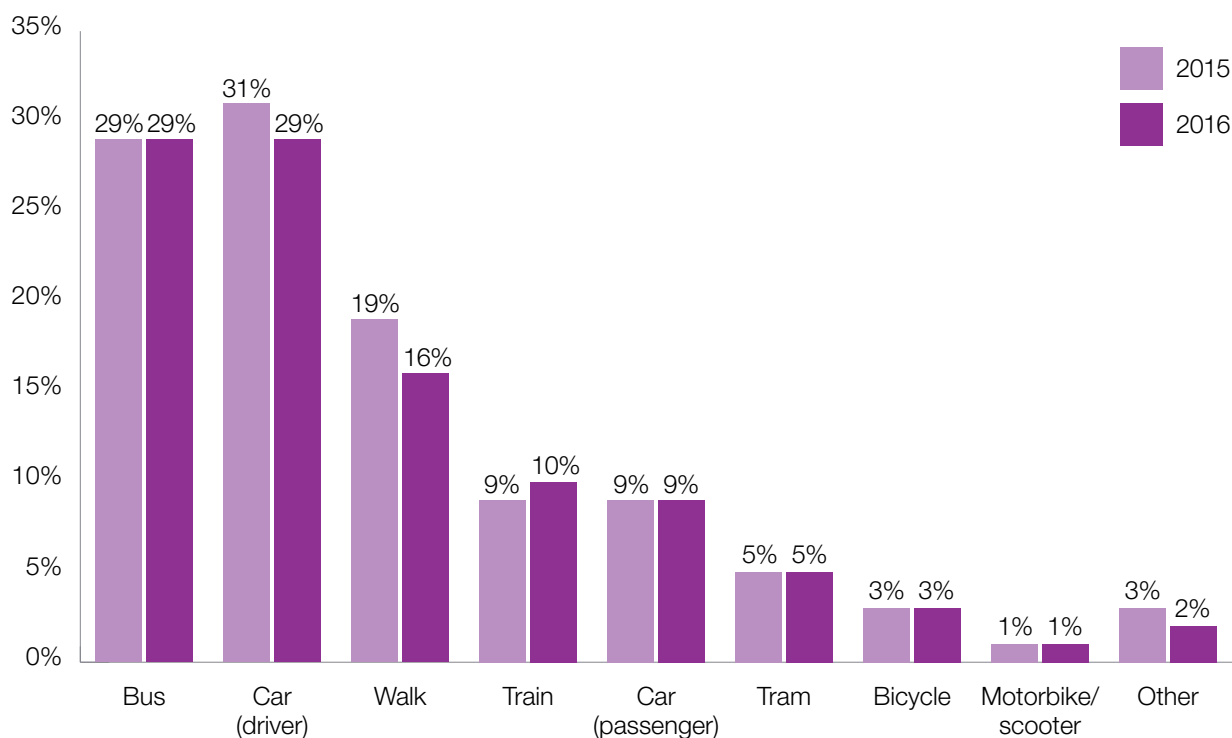
Question: How did you travel to the City today?

For city residents, walking was the most popular travel option with two in three residents traveling to the City this way. In comparison, city students were more likely to catch a bus (46%) while city visitors were more likely to travel by car, either as a passenger or a driver.

Walking or catching a bus was more popular with city users who had a gross household income of less than \$25,000 per year while driving was more popular for those with a household income of more than \$200,000 per year. City users who were in senior managerial or professional roles were also more likely to drive, accounting for 43% of this occupation group compared to 29% for the overall city user population.

The mix of travel modes in 2016 is largely consistent with the previous year though there was a slight decrease in the number of city users driving (from 31% to 29%) and walking (from 19% to 16%).

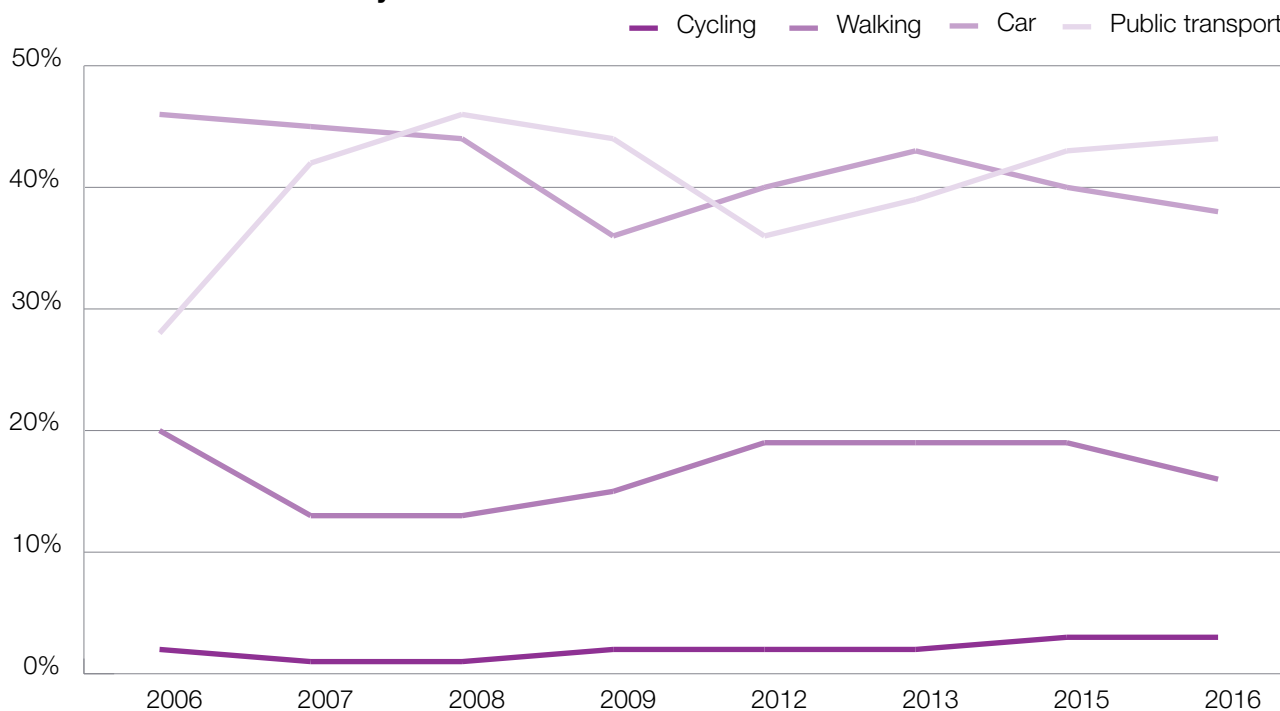
Figure 13: Travel mode to the City - comparison



Base: 2016 (n=2004), 2015 (n=2002)

Modes of travel to the City have been tracked over the last few years to identify any emerging trends in the way people travel to the City. As depicted below, there has been a gradual shift away from travelling by car towards more environmentally-friendly modes such as public transport, walking or cycling. In 2006, only 28% of city users caught public transport. However, by 2016, this figure had increased significantly to 44%. In comparison, the proportion of city users who travelled to the City by car fell from 46% to 38%. The proportion of city users walking and cycling combined has remained steady at around 20% with walking accounting for the majority of this total.

Figure 14: Mode of travel to the City - trend



Base: 2016 (n=2004), 2015 (n=2002)

How safe do people feel in the City?

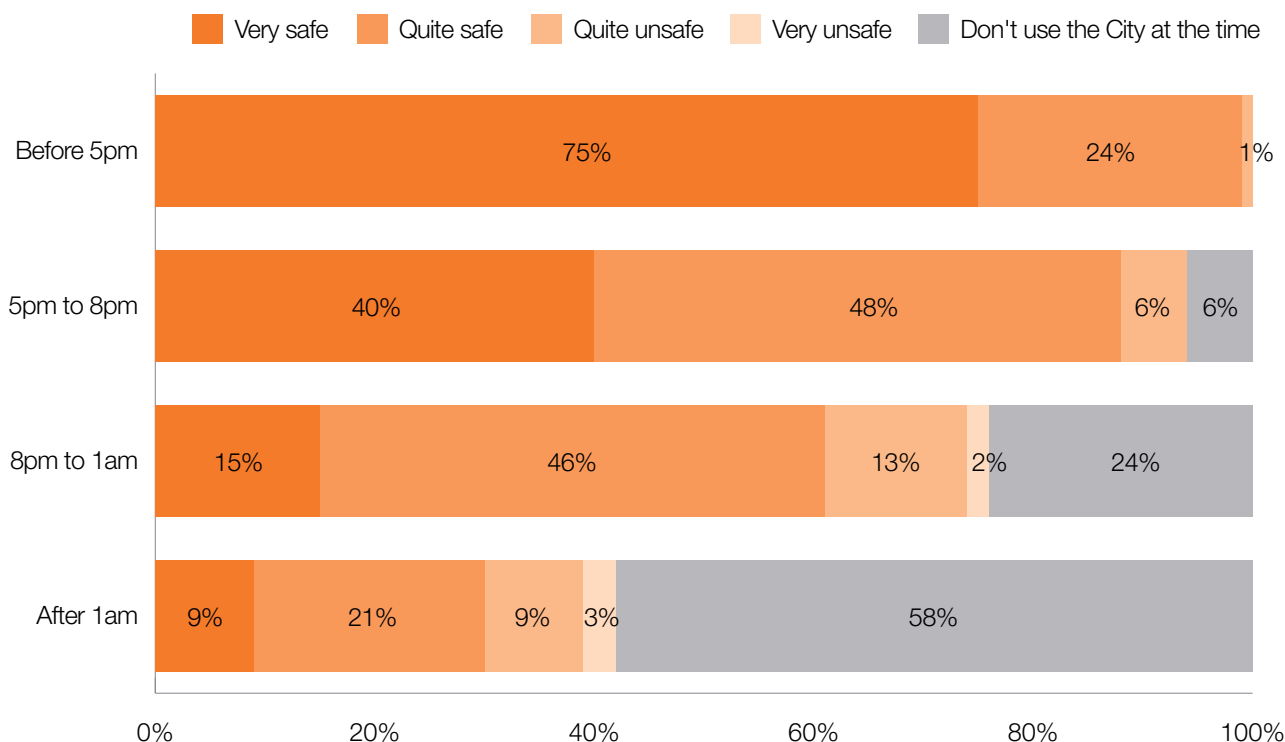
As well as making the City an attractive destination, it is also important to ensure that people feel safe in the City.

During the day (before 5pm), 75% of city users said that they felt 'very safe' while 24% felt 'quite safe'. Perceptions of safety generally declined later into the evening. Between 5pm and 8pm just under half of city users reported feeling 'quite safe' and 40% feeling 'very safe'. 7% said that they did not use the City at that time.

A quarter of city users did not come into the City at all between 8pm and 1am (24%) while nearly three in five did not visit after 1am (58%).



Figure 15: Perceptions of safety in the City



Base: 2016 (n=2004)

City residents and city workers were more likely to feel safe after 8pm while city visitors were less likely to use the City after this time. This may be because visitors tend to be in the City for personal business, shopping and to go to a cafe or have a coffee, which are usually daytime activities.

The results also showed that men and women have different perceptions of safety in the City. While one in four men felt very safe in the City between 8pm and 1am, only one in ten women felt very safe. After 1am, only 5% of women felt very safe in the City compared to 14% of men. Women were also more likely to not use the City during this time (64% compared to 52% men).

When asked about why people felt unsafe, it was mainly due to the presence of intoxicated or drug affected individuals, loiterers and rough sleepers and beggars. Other reasons that contributed to city users feeling unsafe were violence, insufficient lighting and the perception of crime.



How often do people exercise in the City?

As with previous surveys, city users were asked whether they undertook at least 30 minutes of moderate to vigorous physical activity in the City. In 2016, just over half of city users did not undertake at least 30 minutes of physical activity in the City at all while one in five undertook physical activity in the City at least two to three times a week.

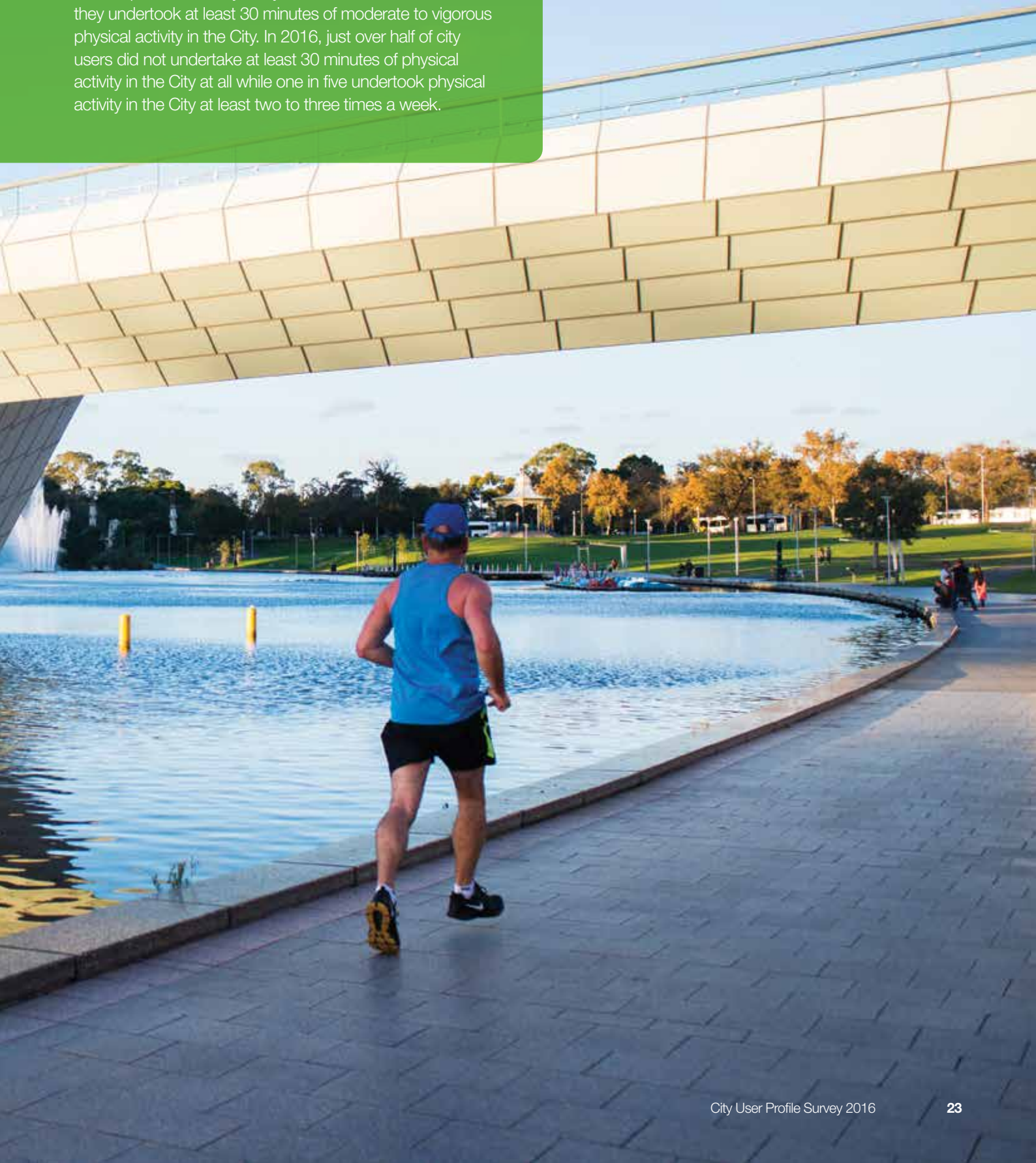
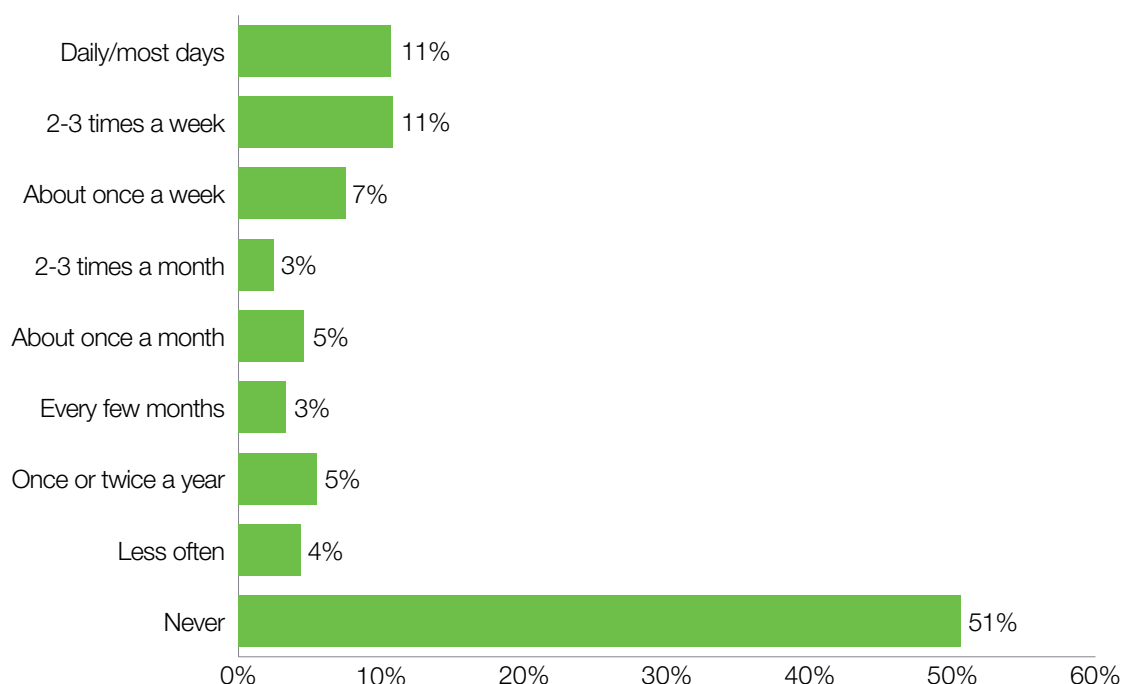


Figure 16: Frequency of exercising in the City 2016

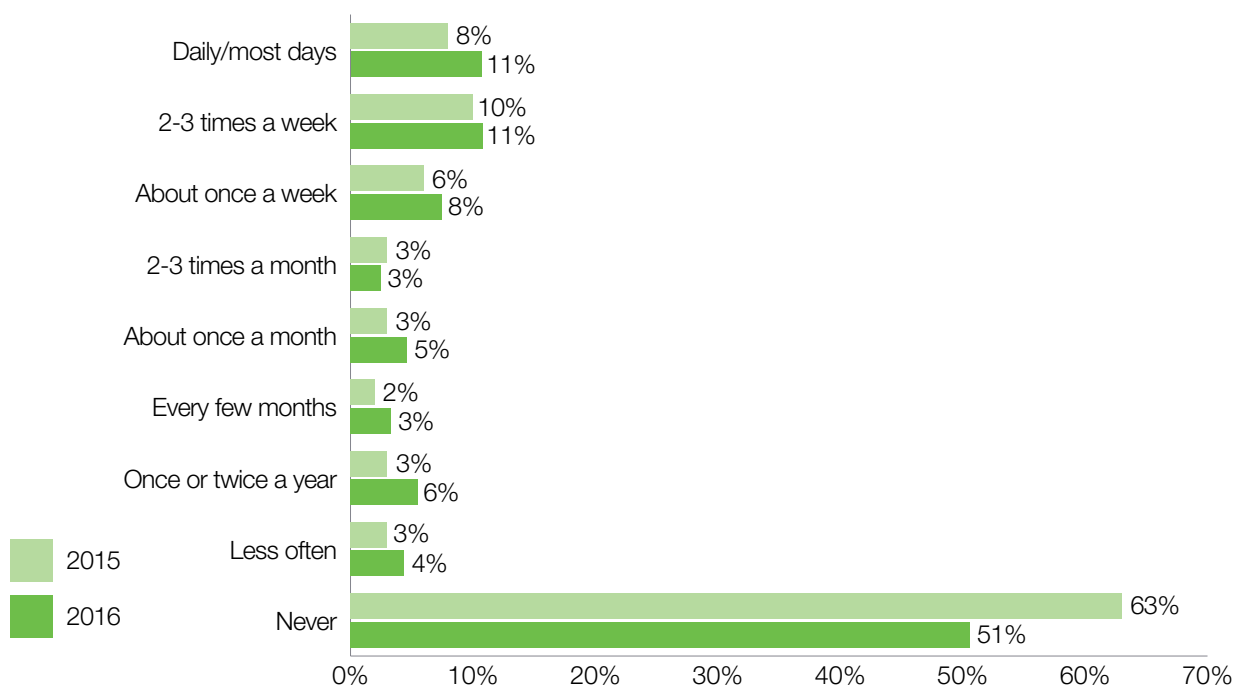


Base: 2016 (n=2004).

Question: How often do you undertake at least 30 minutes of moderate to vigorous activity in the City ('City' includes Park Lands and North Adelaide)

More people are exercising now in the City than in 2015. This is shown by a moderate increase in the proportion of city users who exercised frequently (at least once a week) and a large decrease in the proportion who have never exercised in the City (63% to 51%). A lower proportion of people never exercising in the City may be due to an increased range of activities on offer in the City, as well as greater general awareness of preventative health.

Figure 17: Frequency of exercising in the City - comparison



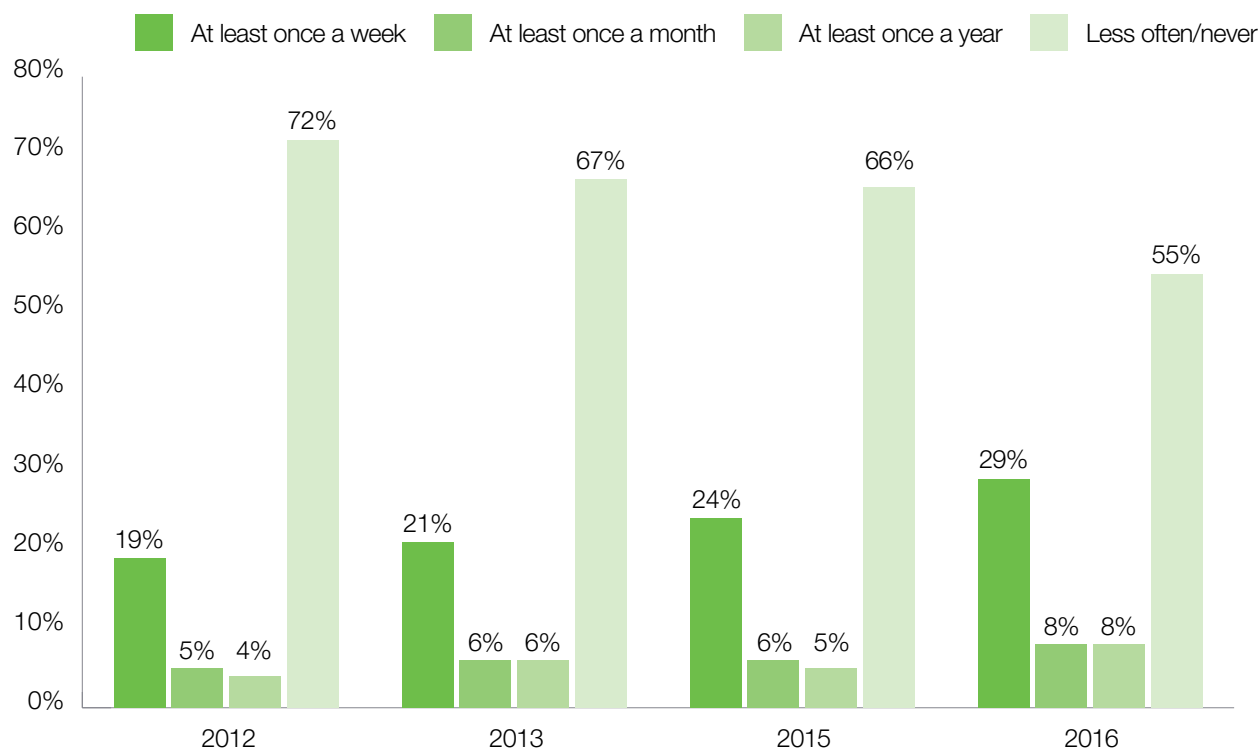
Base: 2016 (n=2004), 2015 (n=2002).

Question: How often do you undertake at least 30 minutes of moderate to vigorous activity in the City ('City' includes Park Lands and North Adelaide)

City residents were the most likely to exercise in the City with over two-thirds of residents doing so at least once per week. City students and city workers were also more likely to exercise at least once a week while city visitors were the least likely to exercise, with 60% saying that they never undertook any moderate to vigorous physical activity in the city. Younger city users, such as those aged 35 and under were more likely to exercise at least once a week compared to other age groups.

Looking at the results since 2012, there has been a downward trend in the number of city users who never exercise or exercise in the City less than once a year, while those who exercise at least once per week has increased. This is consistent with broader national trends where physical activity levels are growing as society becomes more health conscious⁵.

Figure 18: Frequency of exercising in the City – trend



Base: 2016 (n=2004), 2015 (n=2002), 2013 (n=2009), 2012 (n=2001)

Question: How often do you undertake at least 30 minutes of moderate to vigorous activity in the City ('City' includes Park Lands and North Adelaide)



⁵ CSIRO, 2013, 'The future of Australian Sport' CSIRO Futures

What do people think of their City experience?

City users were asked about their views on the city experience such as vibrancy of the nightlife in the City, satisfaction with events and activities, and satisfaction with public art. Respondents were asked to provide a score between zero and ten for a number of statements. A score of zero meant that they strongly disagreed with the statement, while a score of ten meant that they strongly agreed.



Statement	Average Score (out of 10)
The City has great places for people to enjoy events, activities, art and culture	8.2
The City has a vibrant nightlife with restaurants, bars and clubs etc.	7.8
I am satisfied with the diversity and the quality of the events and activities in the City	7.7
I am satisfied with the range of public art and artwork in the City	7.3

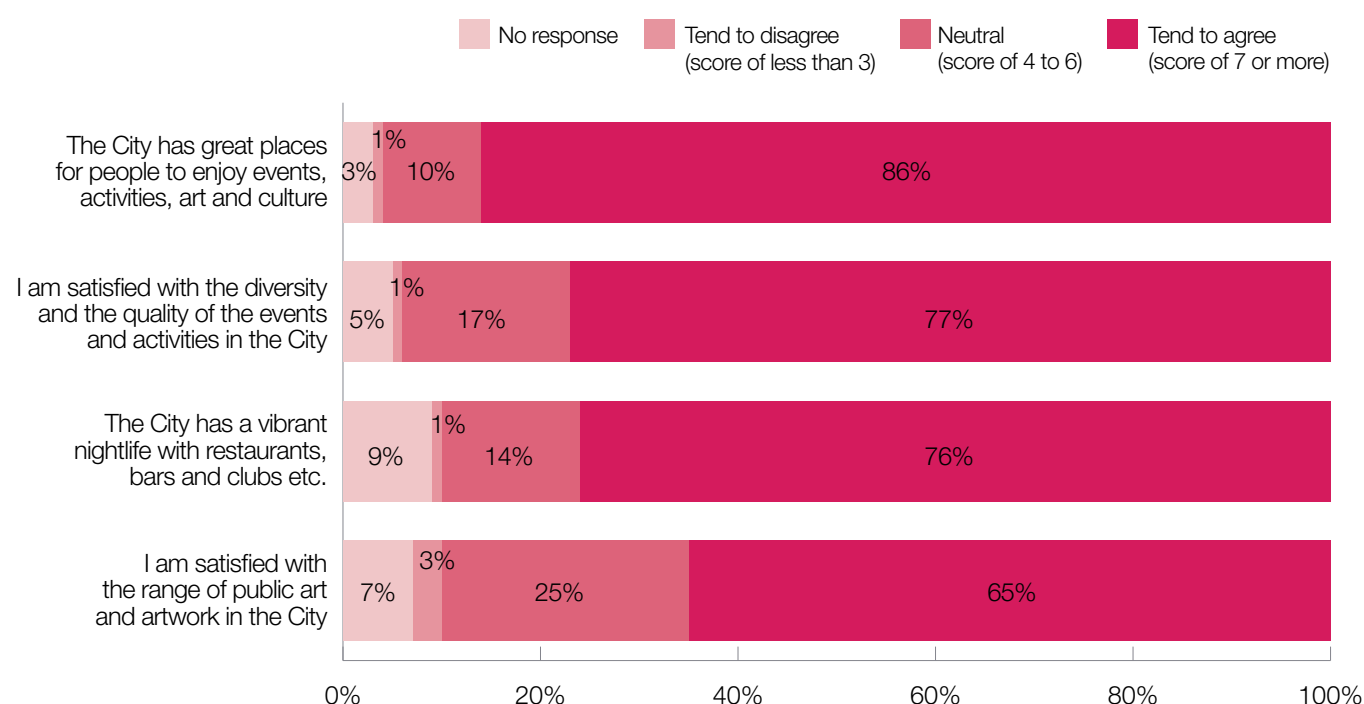
In general, most of the responses provided were favourable toward the city experience with average scores ranging between 7 and 8 indicating a tendency to agree or strongly agree with these statements.

A large majority of city users (86%) tend to agree with the statement that 'The City has great places for people to enjoy events, activities, art and culture', providing a score of at least seven. This statement also had the highest proportion of users who strongly agreed and gave a score of nine or ten (42%).

Most people also tend to agree that the City has a vibrant nightlife and are satisfied with the range and quality of events and activities that were available in the City. Around three quarters of respondents gave this statement a score of at least 7 out of 10.

In contrast, the statement around public art garnered varied responses. Although 65% tend to agree that they were satisfied with the range of public art in the City, one in four city users felt neutral about this statement. This could be attributable to the subjective nature of art and its varied interpretation by different individuals, as well as its quality, placement and overall impact on a streetscape.

Figure 19: Level of agreement with City experience statements 2016



Base: 2016(n=2004)

Question: Thinking of the City as a whole, how do you rate your level of agreement with the following?



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