CITY USER PROFILES SNAPSHOT

Our City user population is diverse with people visiting for various reasons. Of those people on street, one quarter (26%) are shopping, 23% are in the City for work purposes, 11% are meeting friends and 10% are in the City for personal business. During the week, as expected, work accounts for a large proportion of visits, followed by shopping and study.

However, the most common secondary reason (on any given day) was dining and entertainment (37%, a significant increase from 2012). This demonstrates that dining out in the City is seen as an increasingly popular social activity coupled with either shopping or meeting friends. The increase may also be attributed to such initiatives like Splash, which could be engaging and encouraging those already in the city to dine. Shopping in the City remains a key drawcard for both weekend and weekday visits.

Car travel continues to be the most common mode of transport to access the City with just over two in five using this method. Public transport closely follows private car use with just over one quarter of all City users travelling to the City via bus. The remaining one fifth walk or ride a bike.

22,000
estimated resident population (2014)

118,216
number of employees (2011)

CONTACT
Megan Fink or
Elise Richardson on
8203 7203

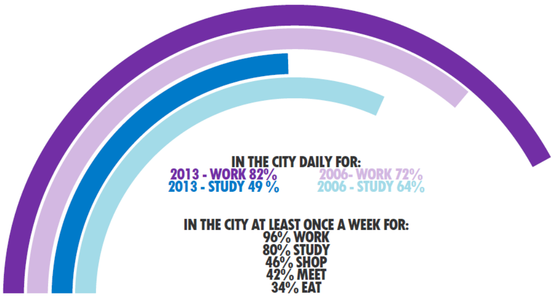
STRATEGY & INNOVATION

SMART INSIGHTS

26% SHOP
23% WORK
11% MEET
09% STUDY
07% EAT

MAIN REASON FOR VISITING THE CITY

WEEKDAY	VS	WEEKEND
32% WORK		34% SHOP
21% SHOP		17% MEET
12% STUDY		10% EAT
07% MEET		09% WORK
06% EAT		04% SPORT



IN THE CITY DAILY FOR:
2013 - WORK 82% 2006- WORK 72%
2013 - STUDY 49 % 2006 - STUDY 64%

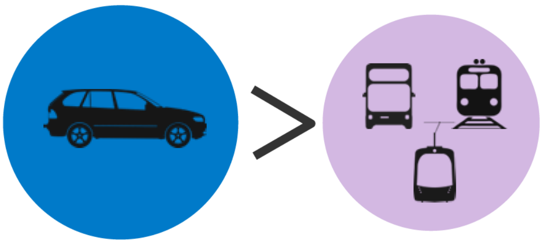
IN THE CITY AT LEAST ONCE A WEEK FOR:
96% WORK
80% STUDY
46% SHOP
42% MEET
34% EAT

WHERE CITY USERS ARE COMING FROM
CITY CENTRE 13%
INNER SUBURBS 53%
OUTER SUBURBS 20%

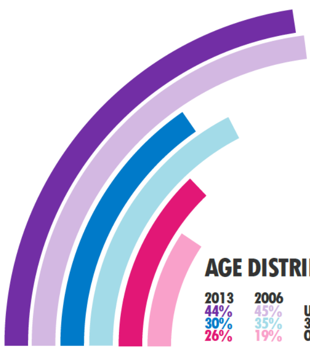
USING PUBLIC TRANSPORT TO GET INTO THE CITY IS ALMOST AS POPULAR AS COMING IN BY CAR

43% vs 39%

21% OF CITY USERS ALSO WALK OR RIDE A BIKE
(SOMETIMES IN CONJUNCTION WITH PRIVATE OR PUBLIC TRANSPORT)



AVERAGE SPEND BY CITY USER
$95 SHOP
$41 WORK
$32 STUDY



AGE DISTRIBUTION

2013	2006	
44%	45%	UNDER 34
30%	35%	35 TO 54
26%	19%	OVER 55

CITY USER PROFILES
RESIDENTS

Our City resident population remains polarised in terms of age with large proportions of both young (under 25s) and older (aged 65+) residents. Occupations of our residents also reflect their diversity with a third being in senior manager or professional roles and one in five describing themselves as primarily students. Our City's households mostly comprise non-families – only 8% of households have dependent children. Lone person households and group households dominate.

Our City residents are most likely to be in the City to shop. They are keen exercisers with over half exercising in the Park Lands at least a couple of times a week and many travelling on-foot for their City visit. While there has been a decrease in City residents driving to their City outing, there is still opportunity to increase the proportion of City residents cycling around the City (only 4% were out on their bikes on the day of the interview).

22,000
estimated resident population (2014)

3,428
number of families (2011)

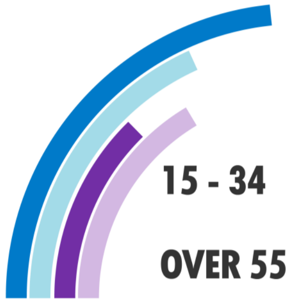
CONTACT Megan Fink or Elise Richardson on 8203 7203

STRATEGY & INNOVATION

SMART INSIGHTS

47% FEMALE

53% MALE



RESIDENT AGE DISTRIBUTION

	2013	2006
15 - 34	46%	37%
OVER 55	25%	33%

DOWN FROM 33% IN 2006

31% MANAGER

UP FROM 15% IN 2006

22% STUDENT

RESIDENT OCCUPATION

19% WORK PART TIME TRENDING DOWN

81% WORK FULL TIME HOLDING STEADY

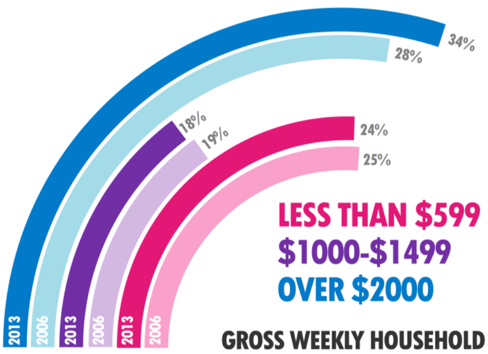
WALKING AND CYCLING WITHIN THE CITY INCREASED FROM 66% IN 2008 TO 76% IN 2013

35%

34%

11%

HOUSEHOLD COMPOSITION OF CITY RESIDENTS
(LONE PERSON / GROUP OF UNRELATED ADULTS / OLDER COUPLE NO CHILDREN)



LESS THAN $599

$1000-$1499

OVER $2000

GROSS WEEKLY HOUSEHOLD INCOME

28% SHOP

19% WORK

13% MEET

09% EAT

MAIN REASON FOR RESIDENTS USING THE CITY

CITY RESIDENTS ARE PHYSICALLY ACTIVE WITH 69% UNDERTAKING 30 MINUTES OF MODERATE TO VIGOROUS EXERCISE AT LEAST ONCE A WEEK. 75% USE THE PARK LANDS AT LEAST ONCE A YEAR.

CITY USER PROFILES
STUDENTS

In 2013 age groups have remained relatively consistent, and 15-24 year olds continued to be the largest proportion. The significant increase in 25-34 year olds in the previous research has remained stable. 75% identify themselves as primarily students, while 15% indicated that they are in senior management / professional or clerical / white collar occupations.

City students come from a range of areas; most travel from the inner suburbs (61%), fewer from the outer suburbs (19%). 17% of students are residents of the City.

Nearly all students use the City for shopping at least once a year, while the drop in Park Lands usage by students apparent in the 2012 survey has now returned to the level seen in 2008.

In 2013, three out of five students (60%) visit the City daily for their study while also continuing to shop in the City on a regular basis. 60% of students shop in the City at least once a week. Almost half of the students are participating in leisure or entertainment in the City at least weekly. However, there is a growing group of students who never visit for this purpose.

86,700
estimated number of students (2011)

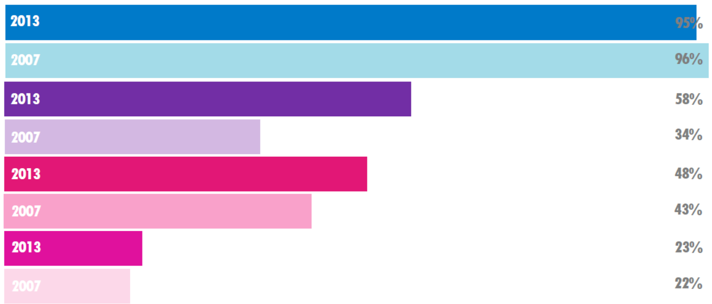
40,500
estimated number at university

CONTACT Megan Fink or Elise Richardson on 8203 7203

STRATEGY & INNOVATION

SMART INSIGHTS

STUDENTS ARE IN THE CITY AT LEAST ONCE A WEEK FOR
95% STUDY
58% SHOP
48% LEISURE
23% WORK



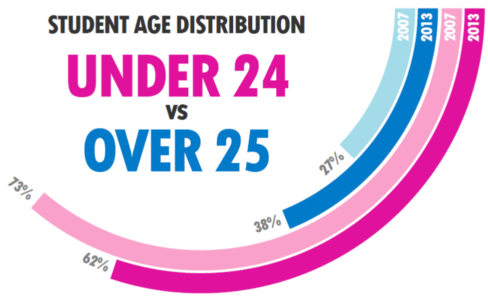
HOW STUDENTS TRAVEL TO THE CITY

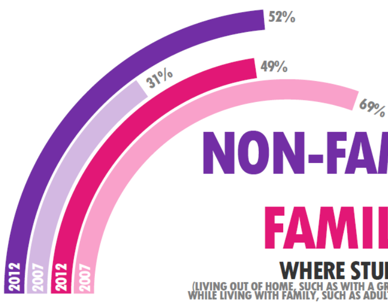
60% PUBLIC TRANSPORT

25% WALKING / CYCLING

23% PRIVATE TRANSPORT

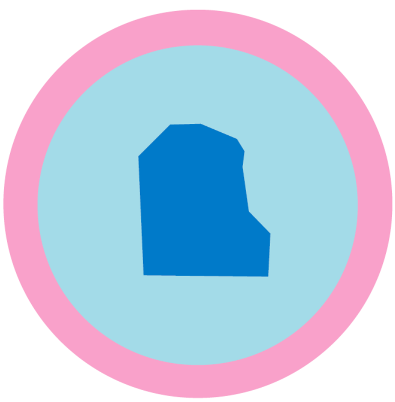
STUDENT AGE DISTRIBUTION
UNDER 24 vs **OVER 25**





NON-FAMILY HOME vs **FAMILY HOME**

WHERE STUDENTS ARE LIVING
(LIVING OUT OF HOME, SUCH AS WITH A GROUP OF OTHER NON RELATED ADULTS IS TRENDING UP, WHILE LIVING WITH FAMILY, SUCH AS ADULT CHILDREN WAS TRENDING DOWN BUT IS NOW STABLE)



WHERE STUDENTS ARE COMING FROM
CITY CENTRE 17%
INNER SUBURBS 61%
OUTER SUBURBS 19%

CITY USER PROFILES

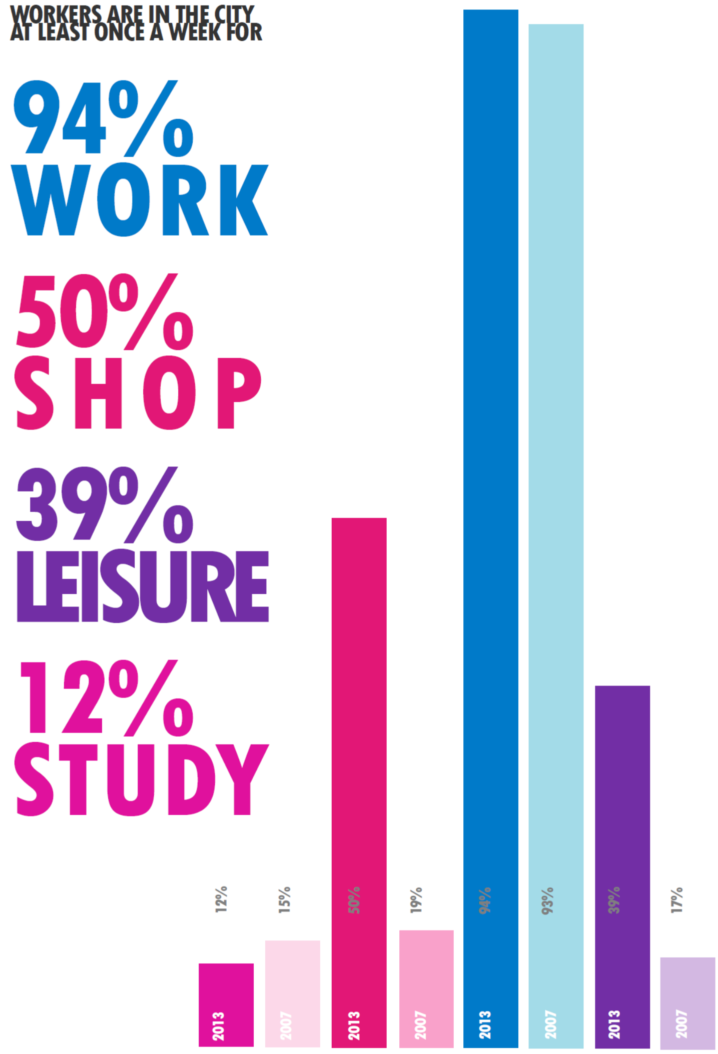
WORKERS

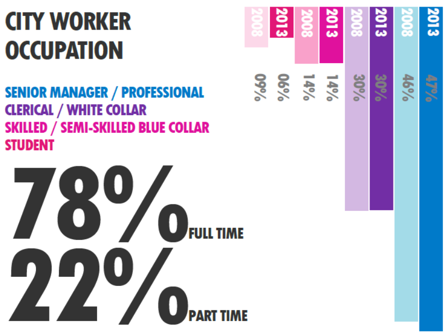
Consistent with 2012, over four out of ten City workers are aged 15-34, while those aged 45 and over appear to be slowly decreasing in number. Commensurate with younger age ranges, City workers are more likely to come from non-family households (60%) than family households (40%). City workers are mostly white-collar workers. In 2013 more City workers are senior managers / professionals, replicating results seen in 2008.

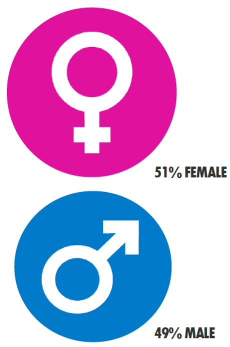
City workers are avid users of the City with most using the City for multiple purposes – 97% shop in the City and 69% visit the Park Lands.

Most City workers visit the City most days (96% visit for work purposes at least once a week). After the significant increase in frequency of the City workers shopping in 2012, shopping frequency remains stable in 2013 with half shopping at least once a week.

More workers now use the City for leisure or entertainment at least once per month (71%) up from 66% in 2012 and 57% in 2008.

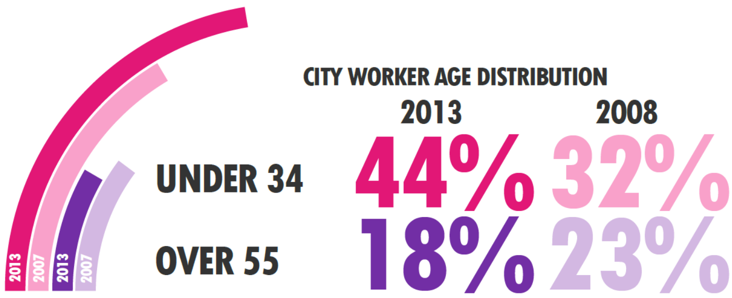


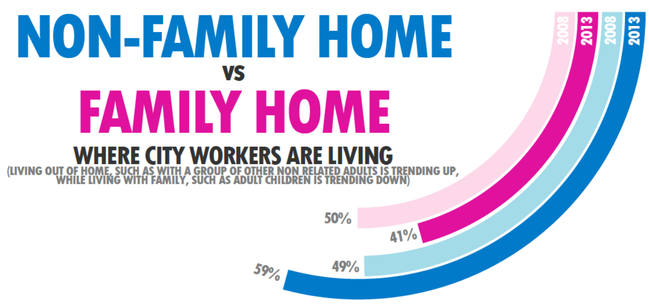




25,326	118,216
public admin and safety workers (2011)	public admin and safety workers (2011)

CONTACT Megan Fink or Elise Richardson on 8203 7203





STRATEGY & INNOVATION

SMART INSIGHTS

CITY USER PROFILES
VISITORS

Almost half of all City visitors are aged 15-44 years, comparatively unchanged since the 2012 research. The City tends to draw slightly more people from child-free households – 20% of City visitors live in lone person households and 19% live as an older couple with no children at home. City visitors are getting younger; the proportion of older couples with no children at home has slowly decreased since 2007, while the proportion of young couples with no children and group household members using the City have both increased.

Half of all visitors come from the inner suburbs, 22% visit from the outer suburbs and 29% visit from interstate, overseas or country SA.

City visitors are keen shoppers with around half visiting the City at least monthly. Interestingly, leisure and entertainment visitors are quite polarised, with a growing proportion of visitors claiming they never visit the City for entertainment or leisure purposes. The focus on activating the City with a broader range of evening leisure and entertainment options and programs such as Active Ambassadors, Splash Adelaide and numerous City based events may increase use of the City for leisure and entertainment among those who currently do not visit the City primarily for that purpose.

As in 2012, in 2013 dining and entertainment is mentioned as a secondary reason for visiting the City by a third of visitors but is less likely to be a main reason.

23million
estimated visitors to Rundle Mall (2011)

8.5million
estimated visitors to Central Markets (2011)

CONTACT
Megan Fink or
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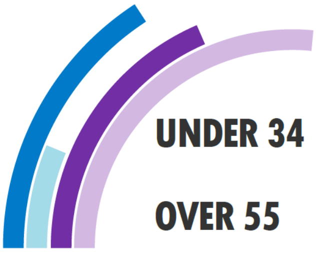
STRATEGY & INNOVATION
SMART INSIGHTS

50% FEMALE

50% MALE

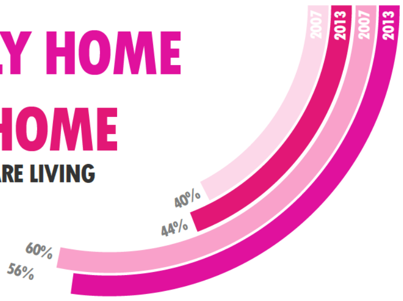


VISITOR AGE DISTRIBUTION

	2013	2007
UNDER 34	33%	16%
OVER 55	38%	54%

NON-FAMILY HOME VS FAMILY HOME

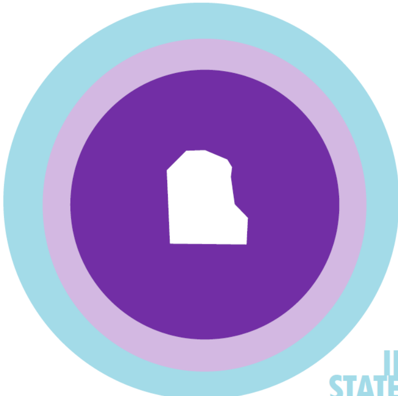
WHERE VISITORS ARE LIVING



56% PAID WORK
UP FROM 47% IN 2007

VS

44% NON-PAID WORK
DOWN FROM 52% IN 2007



WHERE VISITORS ARE COMING FROM

INNER SUBURBS 50%

OUTER SUBURBS 22%

INTER - INTRA STATE / OVERSEAS 29%

VISITORS ARE COMING TO THE CITY AT LEAST ONCE A MONTH FOR

52% SHOP
UP FROM 37% IN 2007

41% LEISURE
UP FROM 32% IN 2007

HOW VISITORS TRAVEL

60% PUBLIC TRANSPORT

25% WALKING / CYCLING

23% PRIVATE TRANSPORT