CITY USER POPULATION RESEARCH 2012-2013

STRATEGY & INNOVATION

SMART INSIGHTS

ADELAIDE CITY COUNCIL

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BACKGROUND

Adelaide City Council undertakes research to help us understand our City when making decisions. Primary data collection amongst our City users complements other research obtained through secondary data sources (such as the ABS) to help provide a full picture of the City. Research is used to inform strategy and policy development and evaluate our City initiatives.

The City Users Population Research (CUP) has been undertaken in some from since 2002. It started as a customer satisfaction survey and a number of specific profiling surveys but, in recent years, has had a focus on understanding our broader City and the demographic, attitudinal and behavioural profile of our City Users.

The 2012 CUP outlines some challenges for the City for the coming years and will work to help inform what we do going forward.

METHODOLOGY

2001 City Users were interviewed in September 2012. Interviews were conducted on-street at a number of locations across the City throughout the month and included a cross-section of days of the week and times of day. The methodology applied in 2012 was the first time the study was conducted as an on-street interview rather than telephone. The study was moved on-street to capture a representative snapshop of our typical City user on a given day. On-street was also felt to be better able to capture a more representative sample due to the reduction of landlines in households (particularly our City households which are occupied by a mobile community).

EXECUTIVE SUMMARY

GENERAL CITY USERS

Our City population is diverse with people visiting the City for a good spread of reasons. Of those people on street, 23% are in the City for work purposes, 33% are shopping, 13% are meeting friends and 6% are studying. Shopping in the City is a key drawcard for both weekend and weekday visits. Even those visiting the City for work and other main reasons will frequently get sidelined by the shops with one third nominating shopping as their secondary reason to visit. Those visiting on weekends for dining / entertainment has shown a downward trend and should be monitored – has this group moved their business elsewhere? Initiatives such as Splash Adelaide are likely to draw the crowds back in (and the current Splash Evaluation will shed some light on this). Travelling by public transport is as popular as travelling by car.

CITY RESIDENTS

Our City resident population remains polarised in terms of age with large proportions of both young (under 25s) and older (aged 65+) people. Occupations of our residents also demonstrate their diversity with a third being in senior manager or professional roles and a quarter describing themselves as primarily students. Our City's households mostly comprise non-families – only 10% of households have dependent children. Lone households, share houses and older couple living without children dominate.

Our City residents are most likely to be out and about 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 on 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).

CITY STUDENTS

The characteristics of our City students have shown some changes in 2012 with a larger proportion of our City students being slightly older than the typical 15-24 year old student and being in a professional career – the proportion of 25-34 year age group has increased significantly and a larger proportion indicated that they are in senior management / professional or clerical / white collar occupations. In 2012, our students are visiting less frequently for study (suggesting they are part-time students) and more frequently for work and for shopping (potentially due to a higher disposable income). Similarly to residents, some students are helping to make our City vibrant with an increase in the proportion visiting at least weekly over time. However, there is an increasing group of students visiting less often than monthly.

CITY WORKERS

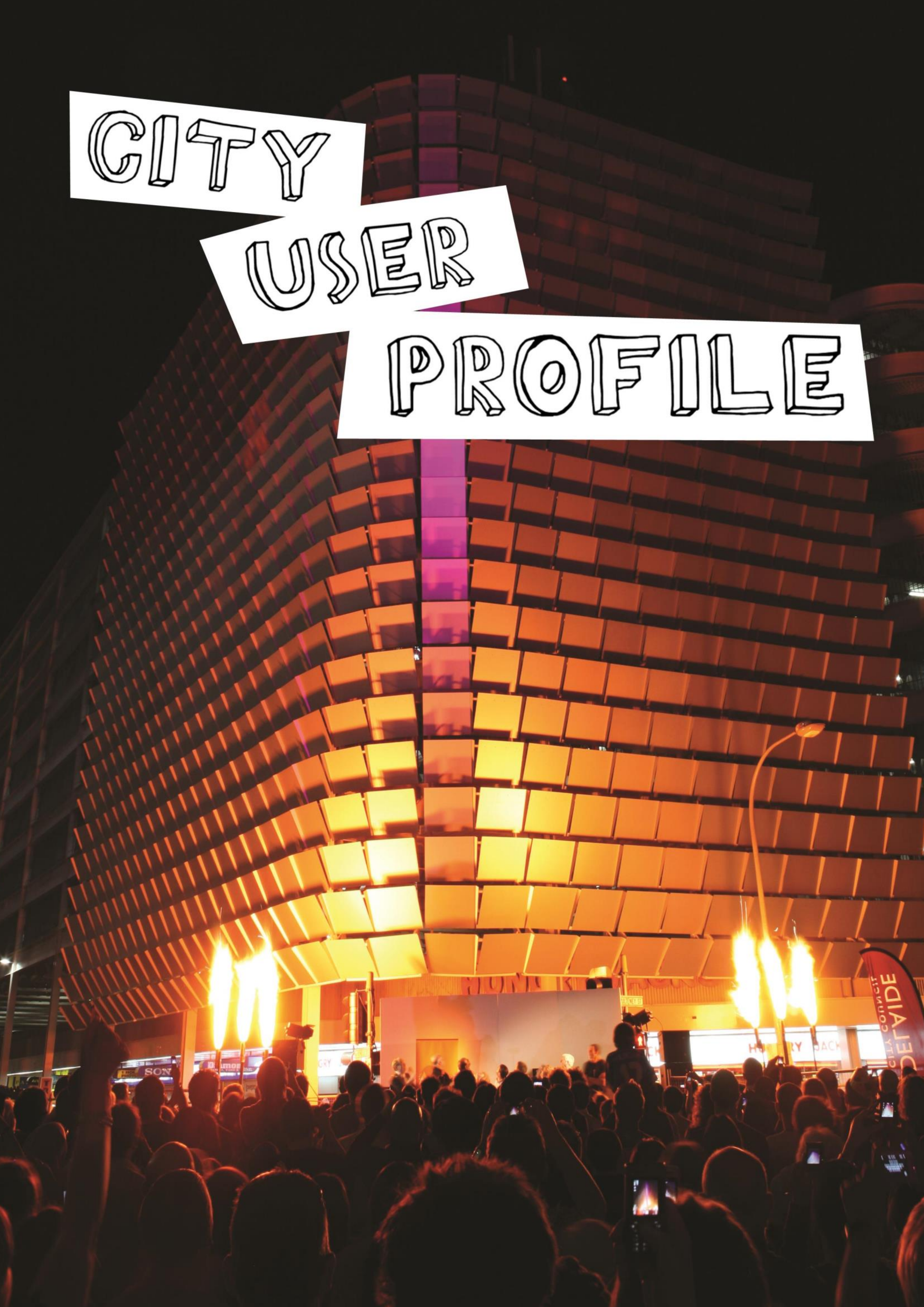
Almost half of our City workers are aged 15-34 and this proportion is growing suggesting our workforce age is declining. Furthermore, a shift towards households without children was evident in City Workers in 2012, particularly in lone person households and households of unrelated adults.
City workers are avid City users with well over three quarters visiting the City most days (96% visit for work purposes at least once a week). Frequency of the City workers using the City for shopping or for leisure or entertainment is on the increase. This will be an important group to monitor as the Splash Adelaide events target the after work community.

CITY VISITORS

City visitors are slightly more likely to be female and almost half are aged 15-44 years. The City tends to draw people from child-free households – 22% of visitors live in lone households and 22% live as an older couple with no children at home. 50% of our visitors visit from the inner suburbs, 20% visit from the outer suburbs and 29% visit from interstate, overseas or country SA.

City visitors are keen shoppers with over half visiting the City at least monthly. Visitation for leisure or entertainment is less frequent than shopping – in fact, there is a growing group of visitors who never visit the City for leisure or entertainment. It may be time to review our leisure / entertainment offer in the City and get a good understanding of where visitors are going to address this need. 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 – how do we raise the profile of our dining / entertainment offer and draw visitors into the City for this as a primary reason to visit?

CITY USER PROFILE



CITY USER PROFILE: ON-STREET SNAPSHOT

This report provides a snap-shot of people in the City on an average day.

Note data collection periods:

2012 – September, 2008 -September and December, 2009 - March and June.

GENERAL USE OF CITY

City users nominated all the reasons why they use the City (not limited to a specific visit), illustrated below. Shopping and Park Lands visitation (and other reasons) are the most frequently nominated reasons for City visits amongst our City user population. A third of those on-street are City workers and 15% are residents. This proportion has not seen significant movements suggesting we are continuing to provide our City users with a good balance of work, study and leisure opportunities.

MAIN REASON FOR VISITING THE CITY

City users cited the main reason for their visit that day. Netting the main reasons for visiting indicates that one third of visitors on any given day are in the City to shop, and almost one quarter are working.

Some fluctuations over time are evident. In 2012, a larger proportion of City users are visiting the City for shopping and to meet friends when compared to 2009.

MAIN REASON FOR VISITING THE CITY WEEKDAY VS. WEEKEND

Shopping accounts for an increasing number of weekday visits with 30% of City users visiting for the main purpose of shopping. Approximately one third of users are shopping. Work also still accounts for a large proportion of weekend visits – 29% of those on-street are in the City for the main reason of work.

More than one in three weekend City users are shopping, followed by more than one in five meeting friends. Weekend shopping visits have shown an upward trend. Those working weekends had shown an upward trend until 2012 which has seen figures return to 2007 levels. Dining or entertainment has shown a downward trend over time suggesting that City users are seeking alternatives to the City when heading out to dinner (or not going out at all).

SECONDARY REASONS FOR VISITING THE CITY

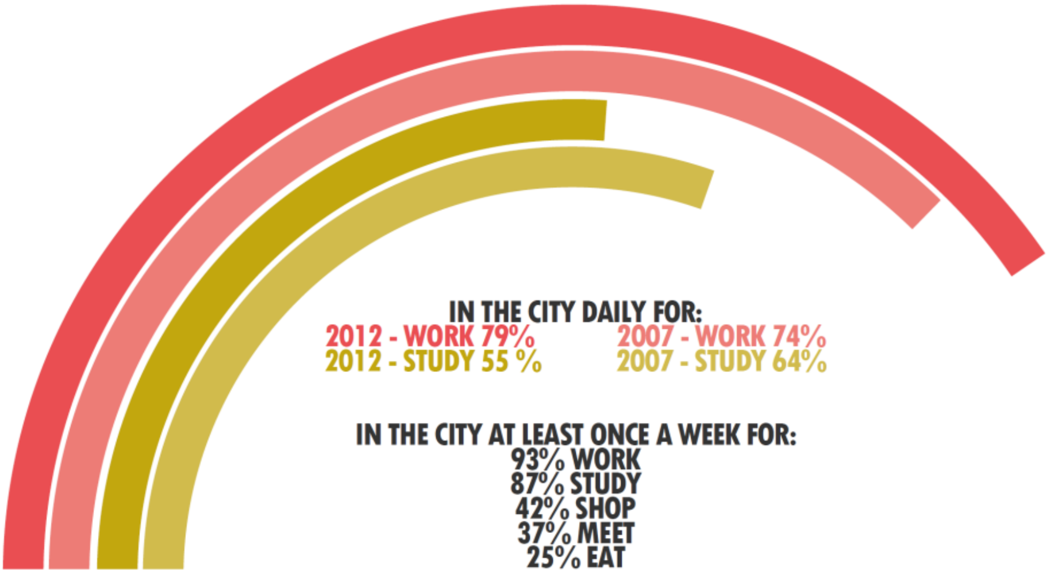
Overall, 72% of City users had multiple reasons for visiting the City in 2012. Shopping is the most common 'other' activity, followed by meeting friends and dining out. Overtime, meeting friends as a secondary reason to visit the City has increased significantly.

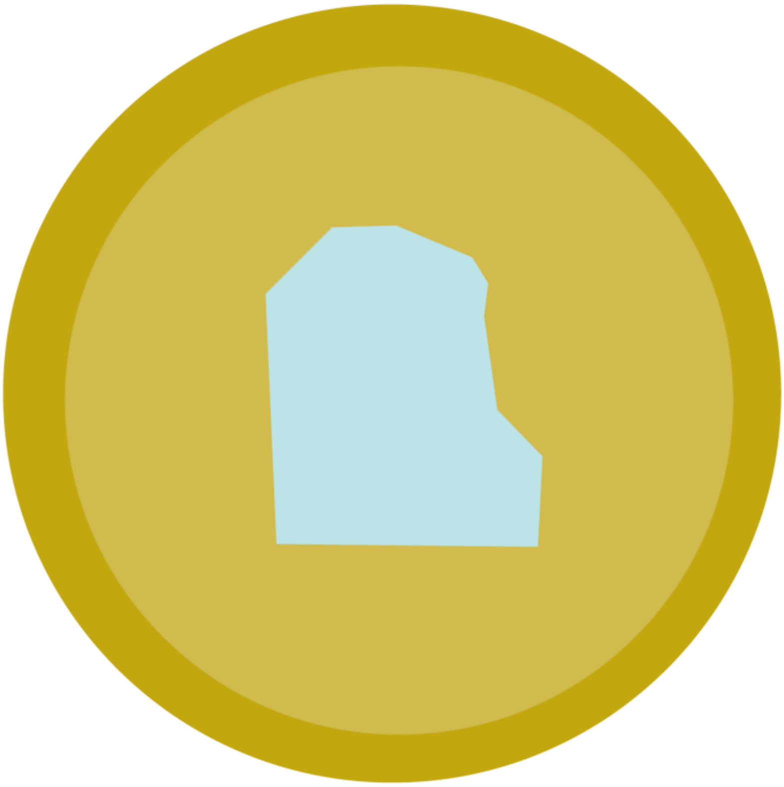
33% SHOP
23% WORK
13% MEET
06% EAT

MAIN REASON FOR VISITING THE CITY

WEEKDAY VS WEEKEND

WEEKDAY	WEEKEND
30% SHOP	39% SHOP
29% WORK	20% MEET
11% MEET	10% EAT
08% STUDY	09% WORK
04% EAT	02% SPORT





WHERE CITY USERS ARE COMING FROM

CITY CENTRE 16%

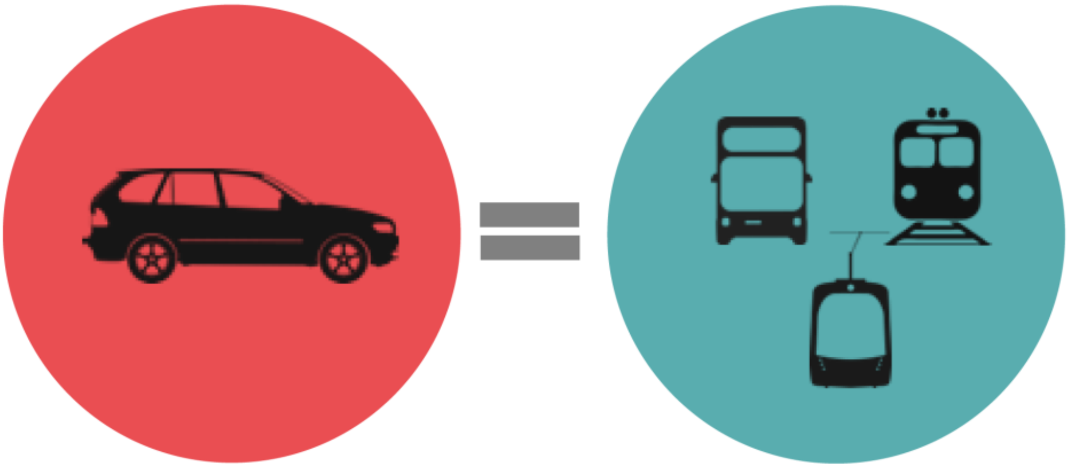
INNER SUBURBS 48%

OUTER SUBURBS 20%

TRAVELLING BY CAR INTO THE CITY IS AS POPULAR AS TRAVELLING BY PUBLIC TRANSPORT

40% vs 40%

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

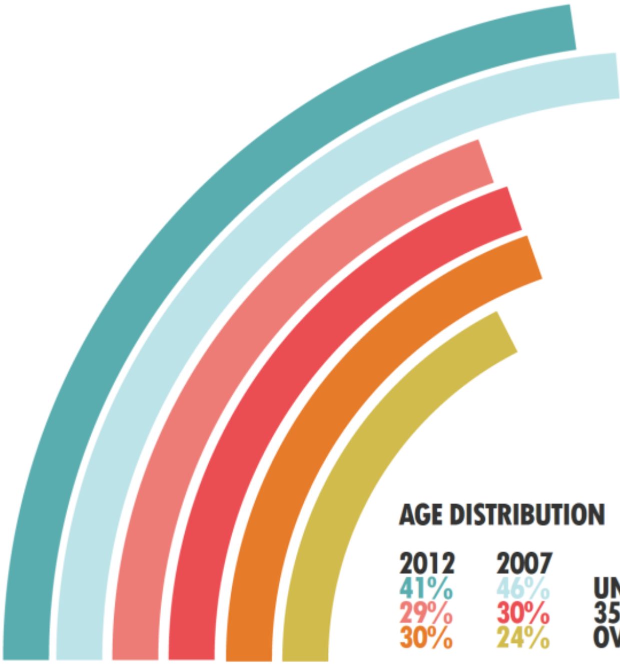


AVERAGE SPEND BY CITY USER

$103 SHOP

$41 WORK

$35 STUDY



AGE DISTRIBUTION

2012	2007	
41%	46%	UNDER 34
29%	30%	35 TO 54
30%	24%	OVER 55

FREQUENCY OF VISITING FOR MAIN REASON

One in two City users visits on a daily basis. Younger City users are the most likely to be regular visitors. A large proportion of workers and students are in the City on a daily basis.

Those visiting the City to shop do so regularly, with 65% shopping within the City at least on a weekly basis. Other leisure activities occur on a less frequent basis, with 60% of City users meeting friends doing so on a monthly basis.

TRAVELLING TO AND WITHIN THE CITY

Car is the most common mode of transport taken to the City with two in five travelling to the City via car. One quarter of all City users travel to the City via bus and one fifth walk or ride a bike. Those travelling by bus has decreased over time while those walking or riding a bike has increased.

AVERAGE SPEND BY MAIN REASON FOR VISIT

Average spend per visit to the City is variable. However, those who are neither working nor studying (typically shoppers) spend the most per visit, followed by workers and students. Spend declined during 2008 to nearly the lowest levels in the past 5 years, yet 2009 recorded a small recovery as did 2012 amongst non-workers and students.

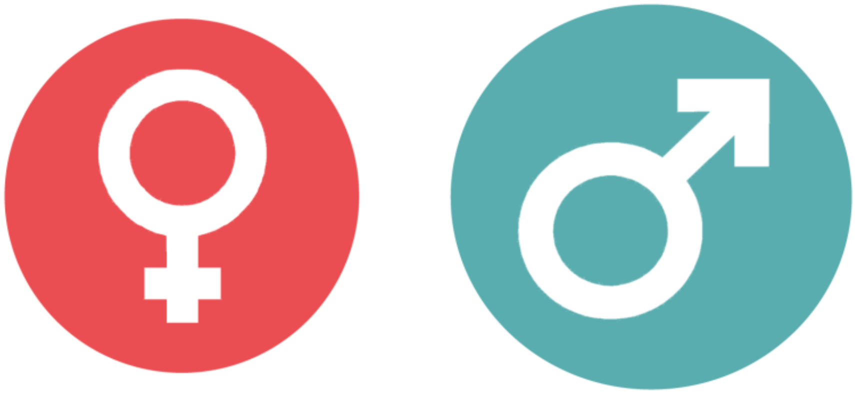
AGE DISTRIBUTION

In 2012, the proportion of those aged 45-64 has increased with a decline in those aged 15-34 years. These figures are in line with those seen in 2005.

POSTCODE

The majority of City users commute from the inner suburbs. The proportion of our on-street population who are City residents has increased.

CITY RESIDENT PROFILE



48% FEMALE

52% MALE

RESIDENT AGE DISTRIBUTION

	2012	2007
UNDER 34	36%	34%
OVER 55	38%	34%

DOWN FROM 36% IN 2007

31% MANAGER

UP FROM 15% IN 2007

26% STUDENT

RESIDENT OCCUPATION

25% WORK PART TIME TRENDING UP

75% WORK FULL TIME TRENDING DOWN

WALKING AND RIDING TO THE CITY INCREASED FROM 66% IN 2008 TO 76% IN 2012

CITY RESIDENT PROFILE

Note A total of 309 residents were interviewed throughout September 2012.

GENDER

The gender breakdown of residents interviewed was 48% female and 52% male. The following chart displays the proportions overs the years.

AGE BREAKDOWN

The age profile of City residents is very polarised with large proportions being under 30 or over 50 years. The City is different to metropolitan Adelaide as it attracts these groups. The age breakdown of current residents in the 2012 study is not appreciably different from those involved in previous studies.

OCCUPATION

53% of City residents were in paid employment, with the majority being in senior manager / professional roles. Roughly one third (31%) of current City residents are employed in positions that they describe as senior management or professional. 48% of City residents were not in paid employment. 26% of this group describe themselves as primarily students.

The occupational breakdown of current City residents in 2012 compared with previous surveys is very similar, with the exception of Students which has increased by 10%. It is possible that the increase in students is methodological as previously residents were surveyed door-to-door rather than on-street.

FULL-TIME AND PART-TIME BREAKDOWN

Of the City residents surveyed who are either in, or looking for, paid work, 75% are full-time, with the remaining 25% in or looking for part-time work.

HOUSEHOLD COMPOSITION

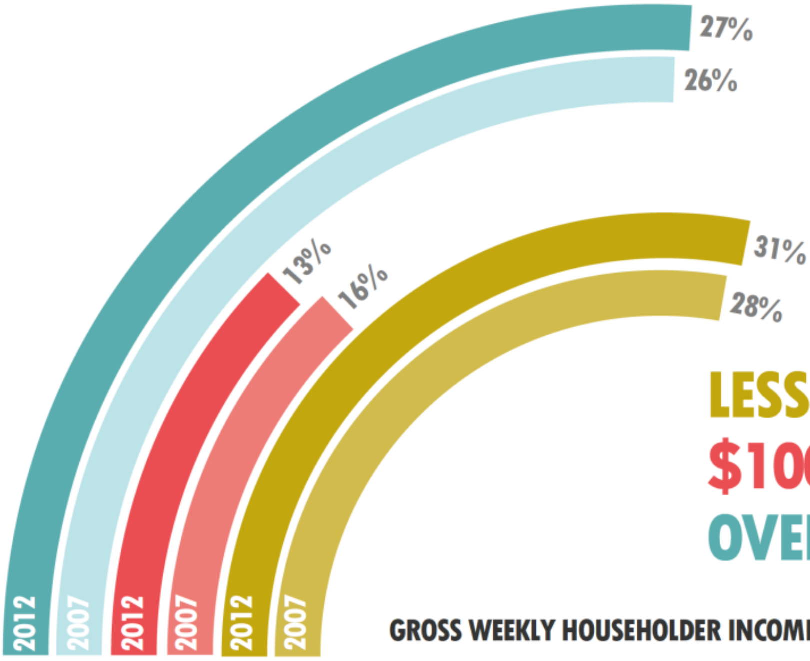
Lone person households (33%) constituted the largest household category, similar to previous studies. Other smaller proportions of respondents indicated that they live in group households containing unrelated adults (19%), or that their household consisted of an older couple without dependent children (23%). A slightly smaller proportion reported that they belonged to households consisting of a younger couple without children (6%).
It would seem that members of households with children were much less likely to be City residents, as such households accounted for all of the smallest proportions of the sample as defined by this criterion.

33%

23%

19%

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



LESS THAN $599
$1000-$1499
OVER $2000

GROSS WEEKLY HOUSEHOLDER INCOME

37% SHOP
18% WORK
13% MEET
06% EAT

MAIN REASON FOR RESIDENTS VISITING THE CITY

CITY RESIDENTS ARE PHYSICALLY ACTIVE WITH 55% UNDERTAKING 30 MINUTES OF MODERATE TO VIGOROUS EXERCISE AT LEAST TWICE A WEEK. 72% USE THE PARKLANDS AT LEAST ONCE A YEAR.

WEEKLY GROSS HOUSEHOLD INCOME

Over a quarter of residents involved in the survey reported that they belong to households which have a gross weekly income of $2000 and over.

COUNTRY OF ORIGIN

As expected, the highest proportion of survey respondents were born in Australia (64%), followed by England (7%).

RESIDENTS' CITY USE

Residents were asked whether they use the City as a student, worker or for other reasons such as shopping and / or visiting the Park Lands.

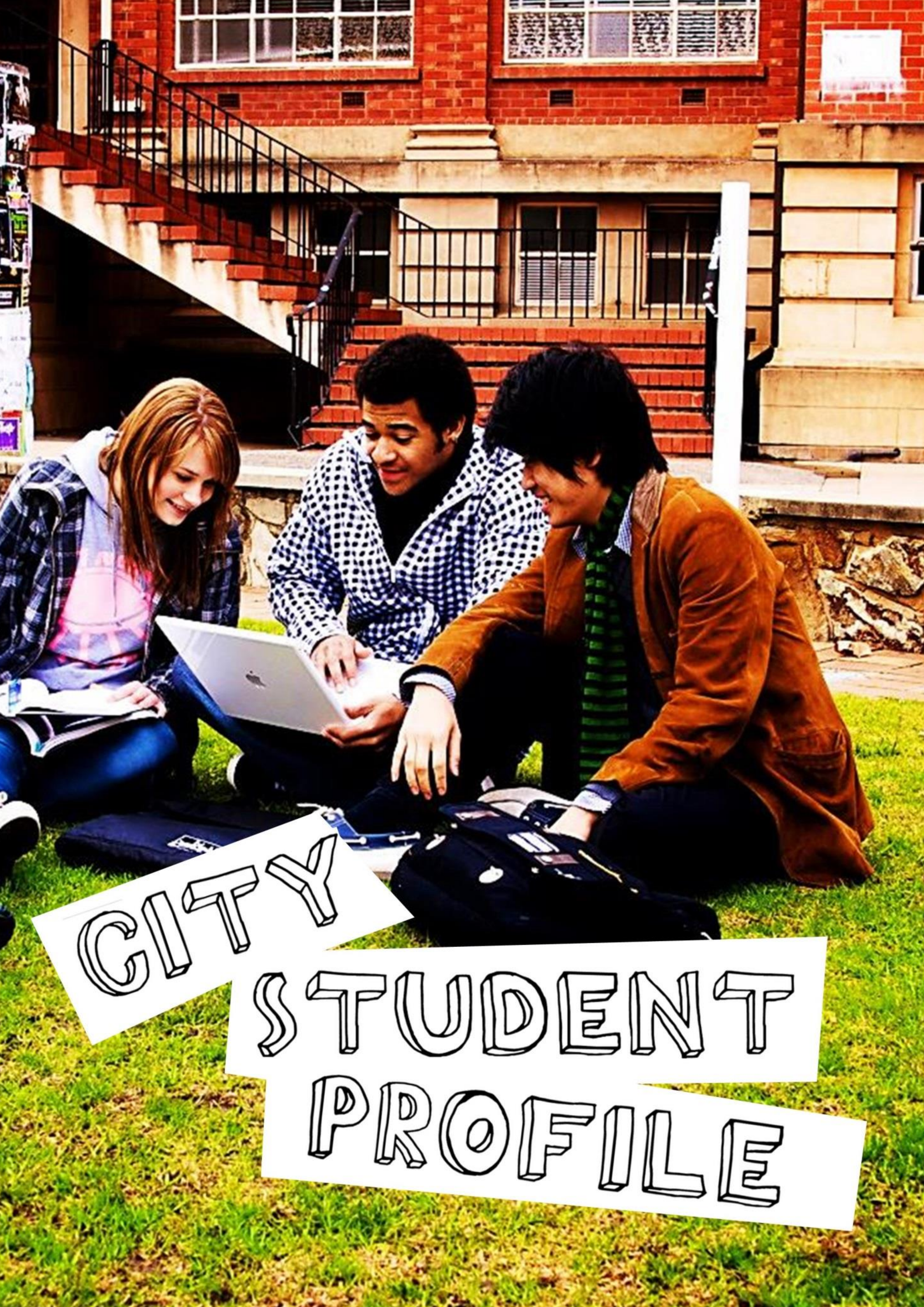
MAIN ACTIVITY UNDERTAKING IN THE CITY

Residents were asked to name the main reason for their City visit on the day of the interview. City residents were more likely to be shopping and less likely to be working on the day of interview when compared to all City users.

City residents are most likely to travel in the City on foot (57% walked into the City on their last visit). Approximately a quarter drove in the City suggesting that there is opportunity to promote walking and cycling to City residents.

PHYSICAL ACTIVITY LEVELS

In 2012 residents were asked how often they undertook 30 minutes of moderate to vigorous physical activity within the City. Positively, 56% undertook exercise at least a couple of times a week (33% undertake exercise daily). However, 19% indicated they never do this, while a further 13% undertake such excercise only a couple of times a year. In contrast to all City users, City residents undertake significantly more physical activity in the City (note: the questions asks about activity undertaken in the City not physical activity in general).



CITY STUDENT PROFILE

CITY STUDENT PROFILE

Note that of the 2000 respondents interviewed across various days and locations throughout the City, 278 people indicated they studied in the City.

GENDER

Slightly more City students were female in 2012, which has remained consistent over time

AGE DISTRIBUTION

The majority of City students are aged 15-24. In 2012, more students in the 25-34 year old age group were evident

HOUSEHOLD COMPOSITION

The proportion of City Students living in group households has further increased from 2008, with 30% of City students living in group accommodation. This increase has driven up the proportion of total non-family households and is reflected in a corresponding decrease in City students living in family situations.

OCCUPATION

67% of students have no other occupation other than being a student, which is a 12% drop from 2008. Slight rises in the proportion of students working in management/clerical roles and skilled labour may reflect a greater number of full time workers who are studying part time.

POST CODE

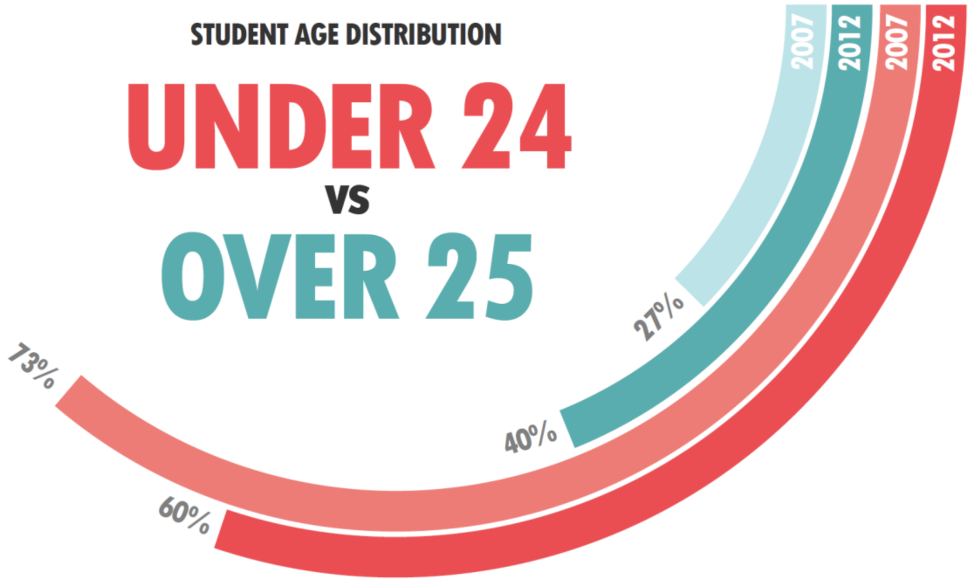
City students tend to travel in from the inner suburbs (60%) although a large proportion live in the City (21%). This proportion has changed over time with an increase in City students living and studying in the City. It is possible that this reflects a change in methodology (previously students were interviewed via a snowballing telephone methodology where students directed the research company to their friends to increase the student sample). Trend data collected in 2013 will provide additional understanding regarding the City students residences.

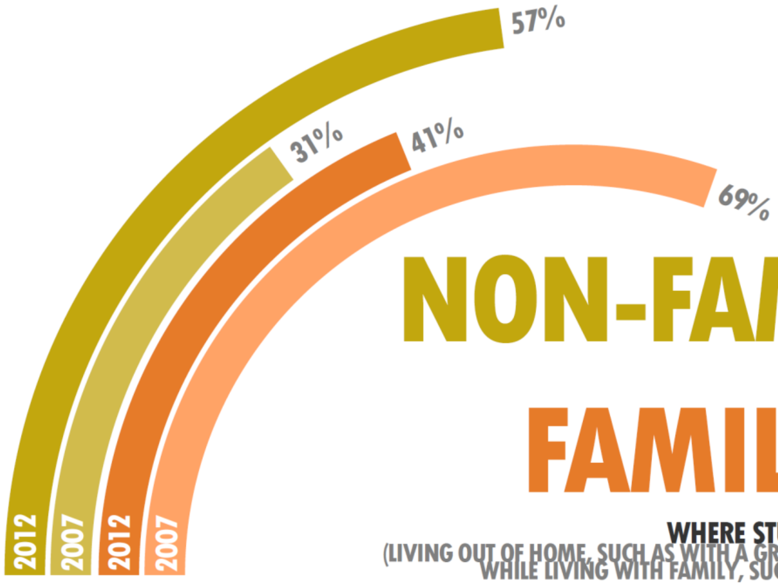
CITY USAGE AMONG CITY STUDENTS

Nearly all students use the City for shopping at least once a year. The proportion of City students using the parklands dropped to 50% - trend data in 2013 will confirm whether this is a data ‘blip’ or whether students are seeking other venues for their leisure such as campus lawns or friends’ backyards. The proportion of students who either also work in the City, has also risen since 2008.

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 IS TRENDING DOWN)

WHERE STUDENTS ARE COMING FROM

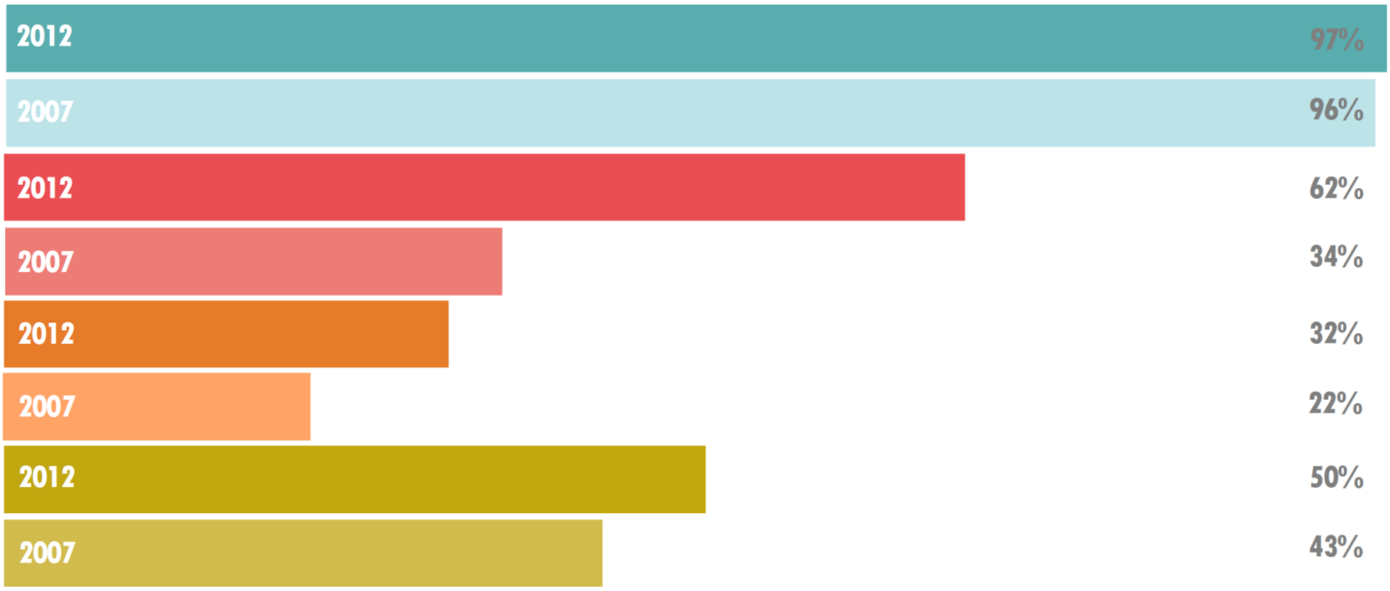
CITY CENTRE 21%

INNER SUBURBS 60%

OUTER SUBURBS 15%

97% STUDY
62% SHOP
32% WORK
50% LEISURE

STUDENTS ARE IN THE CITY AT LEAST ONCE A WEEK FOR



HOW STUDENTS TRAVEL TO THE CITY

23% PRIVATE TRANSPORT

57% PUBLIC TRANSPORT

52% WALKING / CYCLING

FREQUENCY OF USING THE CITY

As expected, study is clearly the most frequent 'purpose' for visiting the City, with almost all City students being in the City daily/most days for study purposes.

FREQUENCY OF BEING IN THE CITY FOR STUDY

97% of students are in the City for study once a week or more. Overall frequency of visitation for study has decreased in 2012 with fewer visiting daily / most days. This is likely a result of timetable changes.

FREQUENCY OF BEING IN THE CITY FOR SHOPPING

The frequency of City students being in the City for shopping has increased since 2008, with 33% visiting at least twice a week.

FREQUENCY OF BEING IN THE CITY FOR WORK

City students are increasingly using the City for work purposes with 30% visiting for work at least a couple of times per week. 65% are still never in the City for work.

FREQUENCY OF BEING IN THE CITY FOR LEISURE OR ENTERTAINMENT

Almost half of City students visit the City for leisure purposes at least weekly and this proportion has grown over time. There is, however, a growing group of students who visit less often than monthly – this group should be monitored over time.

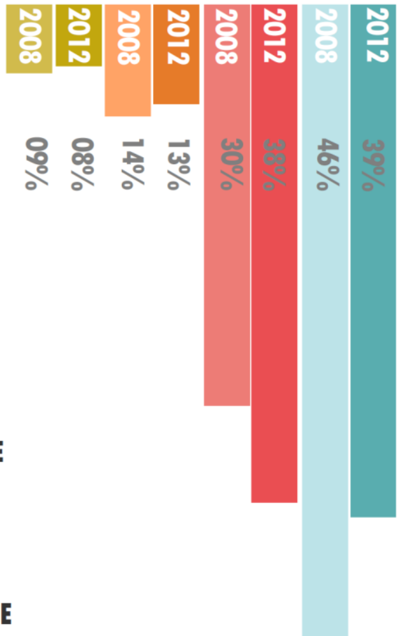
TRAVEL TO THE CITY

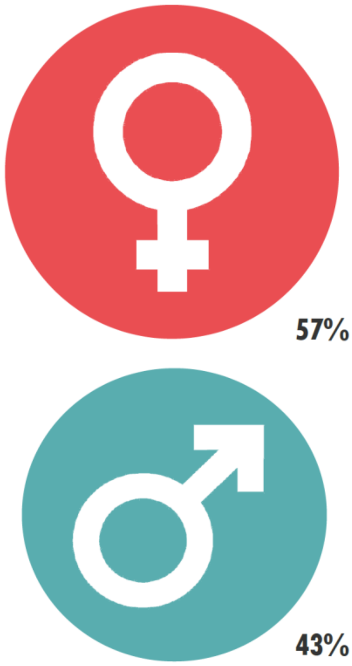
A high proportion of City students choose to walk (19%) or cycle (4%), reflecting their inner City living. Over half utilise public transport, with the bus being the most popular form.

CITY WORKER PROFILE

CITY WORKER OCCUPATION

SENIOR MANAGER / PROFESSIONAL
CLERICAL / WHITE COLLAR
SKILLED / SEMI-SKILLED BLUE COLLAR
STUDENT

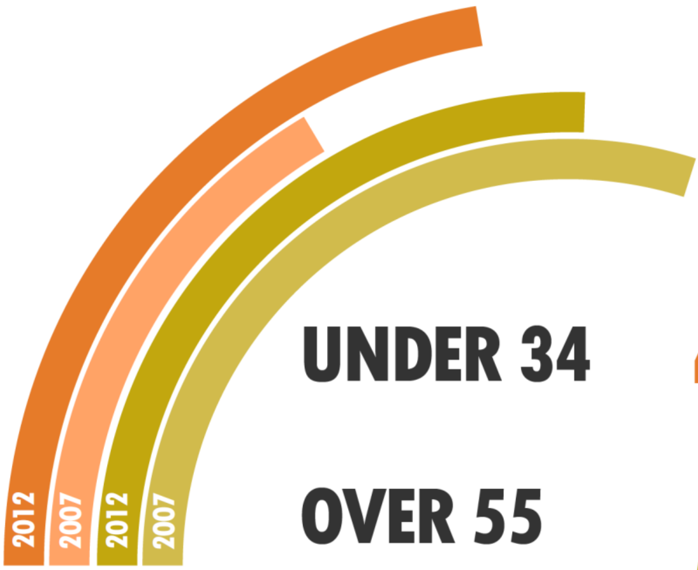




57% FEMALE

43% MALE

78% FULL TIME
22% PART TIME

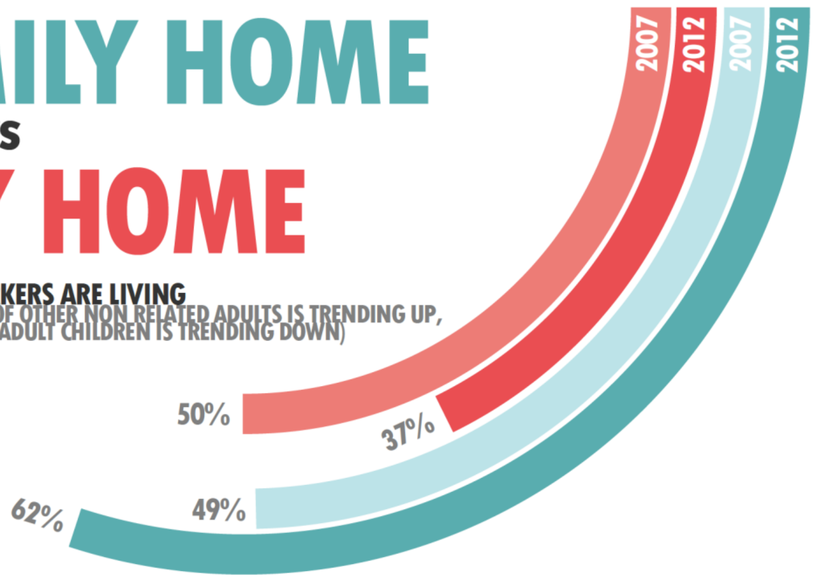


CITY WORKER AGE DISTRIBUTION

	2012	2008
UNDER 34	43%	32%
OVER 55	56%	67%

NON-FAMILY HOME
VS
FAMILY HOME

WHERE CITY WORKERS 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 IS TRENDING DOWN)



CITY WORKER PROFILE

Note Of the 2000 respondents interviewed across various days and locations throughout the City, 671 people indicated they were in the City for work/business.

GENDER

There have been no significant changes in the City's workforce gender since 2008, with slightly more females still working in the City than males.

AGE

The City's workforce is slightly younger when compared to 2008. In particular, a greater number of 15-34 years olds were evident in the City worker group, and fewer 35-74 year olds.

HOUSEHOLD COMPOSITION

A shift towards households without children was evident in City Workers in 2012, particularly in lone person households (20%) and households of unrelated adults (14%). This is in line with the reduction of age of our City workers.

OCCUPATION

The City's workforce remained dominated by white-collar workers, however 2012 saw a reduction in senior managers and an increase in clerical workers, within the respondent group. Again, this is in line with the reduced age of City workers as they are less likely to have the experience required for senior manager status. This is likely due to the methodology change (on-street rather than telephone surveying) with senior managers potentially being too busy to pop out for lunch).

Our City worker sample was made up of three quarters full-time workers and one quarter part-time.

CITY WORKERS CITY USE

FREQUENCY OF WORKERS USING THE CITY

City workers are avid users of the City with most using the City for multiple purposes – 90% shop in the City, 54% visit the Park Lands and 75% visit for other reasons.

Park Lands visitation has shown a decline.

Overall, over 80% of City workers are in the City daily / most days. 'Working' is clearly the most frequent 'purpose' for visiting the City with almost three quarters of City workers being in the City daily / most days for work purposes.

FREQUENCY OF BEING IN THE CITY MAINLY FOR WORK

74% of City workers are in the City for work daily/most days. 96% are in the City for work at least weekly.

FREQUENCY OF BEING IN THE CITY MAINLY FOR STUDY

84% of workers do not use the City for study. 15% use the City for study at least weekly.

FREQUENCY OF BEING IN THE CITY MAINLY FOR SHOPPING

97% of workers use the City for shopping, which is 8% more than in 2008 (this includes those who do so more than once a year).
Over time, the proportion of City workers using the City for shopping at least 2-3 times per week has increased, indicating that more City workers are using the City for their daily shopping.

FREQUENCY OF BEING IN THE CITY MAINLY FOR LEISURE OR ENTERTAINMENT

92% of workers use the City for leisure or entertainment, with 66% using the City at least monthly for this purpose.

WORKERS ARE IN THE CITY AT LEAST ONCE A WEEK FOR

96% WORK

50% SHOP

33% LEISURE

15% STUDY

CITY VISITOR PROFILE

CITY VISITOR PROFILE

Note: Visitors are defined as those who use the City for various reasons but don't live, work or study in the City. In 2012 the methodology for interviewing visitors was changed to intercept on-street (rather than telephone) and this has some implications for the results. Telephone sampling is limited in that we are only able to sample those with a landline in metropolitan Adelaide. Thus, the sample on-street is more reflective of our daily population and includes more visitors from outside metropolitan Adelaide and those who do not have a landline.

GENDER

There is a female bias among City visitors with 54% of visitors being female compared to 46% who are male.

AGE DISTRIBUTION

Until 2012, the proportion of 15-34 year olds who were City visitors had decreased over time. In 2012 the ages of City visitors has balanced out with one third of City Visitors being aged under 35. This change in age is likely due to the change in methodology (telephone interviewing tends to bias older age groups). 16% of visitors on street are aged 65 years and over.

HOUSEHOLD COMPOSITION

Overall, just over two in five City visitors come from households with children in residence. Those from lone person households and older couples with no children at home continue to make up the largest proportion of City visitors. The proportion of City visitors who live in group households has increased in 2012.

OCCUPATION

The proportion of City visitors in paid versus unpaid work has remained reasonably stable over time. City Visitors in senior manager / professional positions has increased steadily since 2005. Results have fluctuated over time.

POSTCODE

Post code has been impacted greatly by the change in methodology and results are not comparable over time (telephone interviewing sampled Metropolitan Adelaide residents only while on-street incorporates all residential locations including country SA and interstate visitors. Interestingly, half of our City visitors reside in the inner suburbs while the other half visit the City from the outer suburbs, country SA and interstate.

54% FEMALE

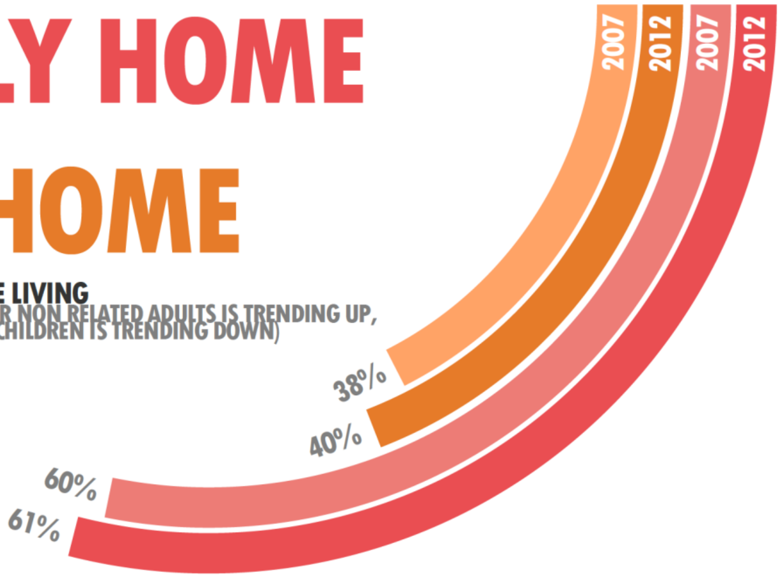
46% MALE

VISITOR AGE DISTRIBUTION
(35-54 STEADY AT 30%)

	2012	2007
UNDER 34	33%	16%
OVER 55	36%	54%

NON-FAMILY HOME
vs
FAMILY HOME

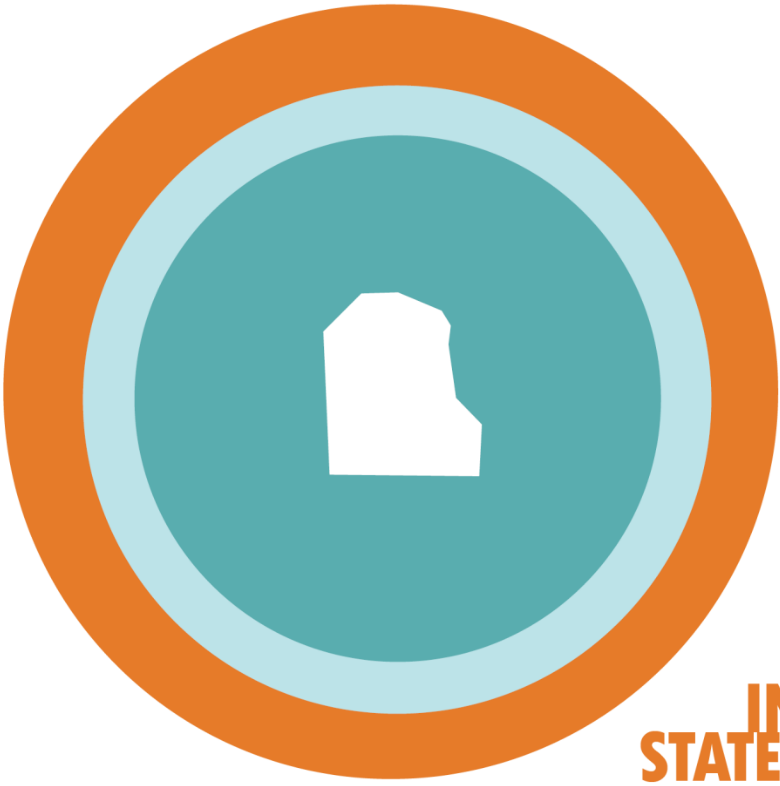
WHERE VISITORS ARE LIVING
(LIVING OUT OF HOME, SUCH AS WITH A GROUP OF OTHER NON-RELATED ADULTS IS TRENDING UP, WHILE LIVING WITH FAMILY, SUCH AS ADULT CHILDREN IS TRENDING DOWN)



54% PAID WORK
UP FROM 47% IN 2007

VS

46% NON-PAID WORK
DOWN FROM 52% IN 2007



WHERE VISITORS ARE COMING FROM

INNER SUBURBS 50%

OUTER SUBURBS 20%

INTER - INTRA STATE / OVERSEAS 29%

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

55% SHOP

UP FROM 37% IN 2007

39% LEISURE

UP FROM 32% IN 2007

HOW VISITORS TRAVEL TO THE CITY

51% PRIVATE TRANSPORT

39% PUBLIC TRANSPORT

35% WALKING / CYCLING

CITY USAGE AMONG CITY VISITORS

City visitors were asked how frequently they visit the City for different purposes. Overall, two thirds of visitors visit the City at least monthly. Visitation frequency is higher for shopping trips than for leisure / entertainment.

FREQUENCY OF BEING IN THE CITY MAINLY FOR SHOPPING

Frequency of visiting for shopping has increased significantly in 2012 with the change in methodology being a likely factor. Those selected on street are more likely to be frequent visitors due to the nature of on-street interviewing.

FREQUENCY OF BEING IN THE CITY MAINLY FOR LEISURE OR ENTERTAINMENT

76% use the City for leisure or entertainment, with 16% doing so at least weekly and 39% doing so at least monthly. There is a growing group of visitors who never use the City for leisure or entertainment.

REASONS FOR BEING IN THE CITY

City visitors were asked to indicate their main and secondary reasons for visiting the City. Shopping in Rundle Mall, meeting friends and undertaking personal services were specific main mentions. Visiting cafes is typically a secondary reason for visiting the City.

When netting City Visitors main reasons for visitation, shopping in the City, including Rundle Mall, Central Markets and elsewhere, is the most popular main reason for visitation with 81% visiting for this purpose. 48% visit to meet friends. Dining / entertainment is likely to be a secondary reason for visiting the City.

HOW TRAVEL TO THE CITY

City visitors' most popular mode of transport is by car with approximately half travelling by car – 36% drive to the City and 13% travel as a passenger. A further third travel by public transport.

CONTACT
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