2013

CITY USER POPULATION RESEARCH

ADELAIDE
CITY COUNCIL

CITY USER POPULATION RESEARCH

STRATEGY & INNOVATION

SMART INSIGHTS

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BACKGROUND

Adelaide City Council undertakes research to help us understand our City when making decisions. Primary data collection from our City users through the City User Population (CUP) surveys is one of the techniques employed. The CUP research complements quantitative and qualitative information obtained through other primary data collections and secondary data sources to provide a comprehensive evidence base for decision making.

The City Users Population Research gathers information directly from residents of the City and metropolitan Adelaide about how they use the City. From its inception as a customer satisfaction and profiling survey in 2002 it has evolved to focus on understanding our broader City and the demographic, attitudinal and behavioural profile of City Users.

METHODOLOGY

Over 2000 City Users were interviewed in September 2013. 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. In 2012 the study underwent a change to on-street as opposed to telephone interviews in order to capture a representative snapshot of our typical City user on a given day. On-street was also felt to be 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). The 2013 study continued this on-street methodology to ensure comparability.

EXECUTIVE SUMMARY

GENERAL CITY USERS

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.

The largest proportion (34%) of City users state their main reason for visiting during a weekend as shopping (down slightly from 2012), followed by meeting friends (17%). On a weekend the main reason for being in the City for dining / entertainment has shown a slight decline. 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. One third of those visiting primarily for another reason also shop. 32% of people visiting for another main reason also meet friends.

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. Campaigns such as ‘Active Ambassadors’ as well as ongoing measures to increase the safety and convenience of walking and cycling, may influence the further take up of those modes of transportation.

CITY 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).

CITY 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.

CITY 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.

CITY 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.

GLOSSARY OF TERMS

Random sampling

Process used in research to draw a sample of a population strictly by chance, yielding no discernible pattern beyond chance. Random sampling can be accomplished by first numbering the population, then selecting the sample according to a table of random numbers or using a random-number computer generator. The sample is said to be random because there is no regular or discernible pattern or order. Random sample selection is used under the assumption that sufficiently large samples assigned randomly will exhibit a distribution comparable to that of the population from which the sample is drawn.

Population

The target group under investigation, as in all students enrolled in first-year composition courses taught in traditional classrooms. The population is the entire set under consideration. Samples are drawn from populations.

Probability

The chance that a phenomenon has of occurring randomly.

Mean

The average score within a distribution.

Quantitative Research

Empirical research in which the researcher explores relationships using numeric data. Survey is generally considered a form of quantitative research. Results can often be generalized, though this is not always the case.

Reliability

The extent to which a measure, procedure or instrument yields the same result on repeated trials.

Group Household

A group household is a household containing two or more unrelated people where all persons are aged 15 years or more, and where there are no couple relationships, parent-child relationships or other blood relationships.

Adelaide Metropolitan area

In very general terms, the boundary for metropolitan Adelaide is located north of the Town of Gawler, south near Sellicks Beach, east through the Adelaide Hills (east of the towns of Bridgewater and One Tree Hill) and along the coast.

Inner and outer suburbs

Inner suburbs of Adelaide refer to all suburbs located approximately within a 12km radius from Adelaide's CBD, while suburbs beyond this (yet still with the Adelaide Metropolitan area) radius are considered outer suburbs.

GENERAL CITY USERS
AN OVERVIEW

GENERAL CITY USERS

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

Note data collection periods:

2013 – September, 2012 – September, 2008 -September and December, 2009 - March and June.

GENERAL USE OF CITY

Those surveyed nominated all the reasons why they use the City (not limited to a specific visit). Shopping and Park Lands visitation (and other reasons) are the most frequently nominated reasons for visits amongst our City user population. A third of those on-street are City workers and 13% are residents. This proportion has not seen significant movements over time suggesting we are continuing to provide our City users with a good balance of work, study and leisure opportunities.

Several city usages have shown a gradual upward trend including visiting the Park Lands and visiting for other reasons at least once a year. Shopping in the City at least once a year has increased in 2013 after remaining stable since 2007.

MAIN REASON FOR VISITING

City users' main reason for visiting the City is shopping (26%), a significant reduction from the 2012 level of 33%, and reflecting levels seen in 2009. Just under one quarter of City users are working.

'To meet friends', 'personal business' and 'study' continue to draw people into the City (ranging from 9%-11% in 2013), all having minor fluctuations over time.

FREQUENCY OF VISITING FOR MAIN REASON

Almost a third of City users visit on a daily basis. Workers and students make up the largest proportion of daily visitors. Those visiting the City to shop do so regularly, with 46% shopping within the City at least on a weekly basis. Similar figures occur for other leisure activities like meeting friends (42%).

Visiting the City daily for work purposes has remained stable, particularly since 2008, while visiting for study has been decreasing since 2009 which may be attributable to a number of factors including the increasing use of online delivery, reducing the need to attend campus on a daily basis.

AVERAGE SPEND BY MAIN REASON FOR VISIT

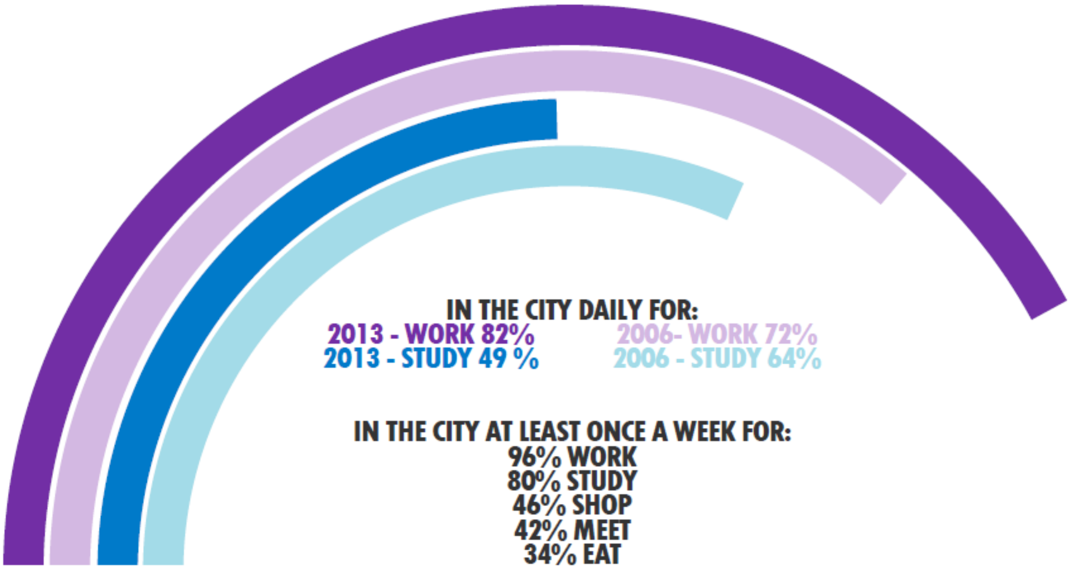
Average spend per visit to the City is variable. However, those who are neither working nor studying (typically shoppers) spend the most per visit, followed by workers and students. Spend declined during 2008 to nearly the lowest levels in the past 5 years, yet 2009 recorded a small recovery which has been maintained over the past three surveys.

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

MAIN REASON FOR VISITING THE CITY

WEEKDAY VS WEEKEND

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



WHERE CITY USERS ARE COMING FROM

CITY CENTRE 13%

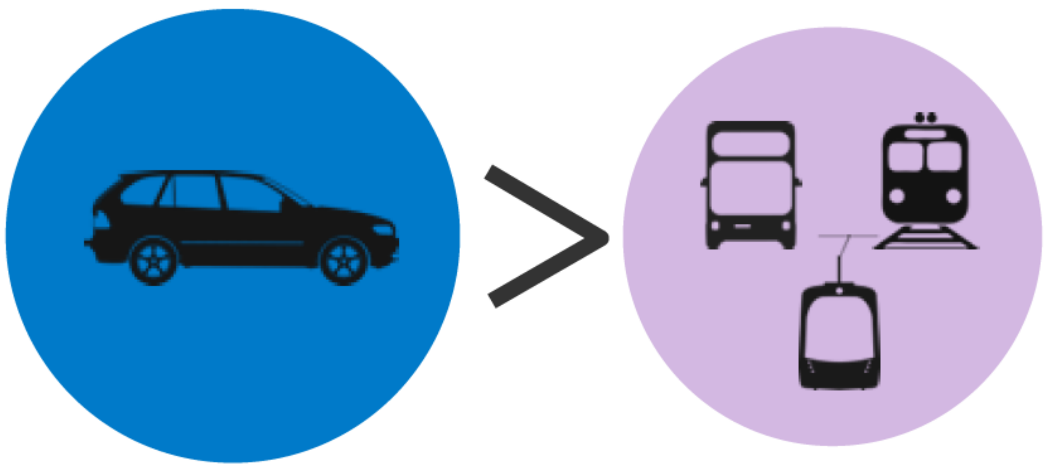
INNER SUBURBS 53%

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)

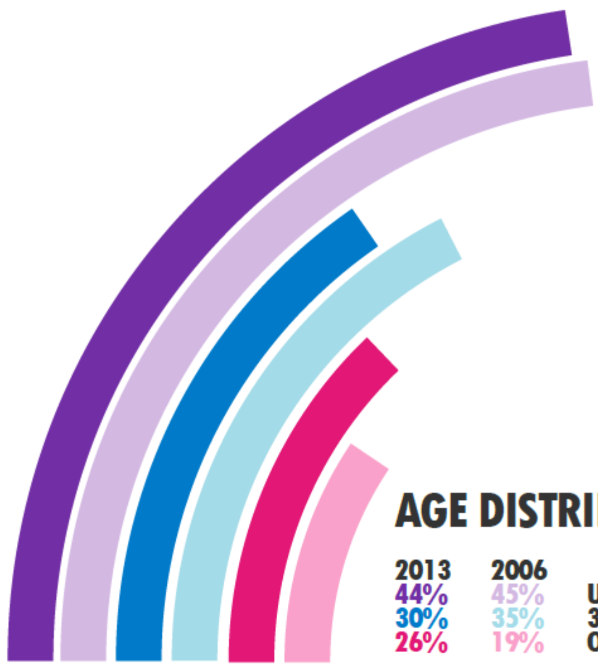


AVERAGE SPEND BY CITY USER

$95 SHOP

$41 WORK

$32 STUDY



AGE DISTRIBUTION

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

SECONDARY REASONS FOR VISITING THE CITY

75% of City users visit the City for more than one reason. Dining / entertainment is the most common secondary activity, followed by shopping and meeting friends.

Dining / entertainment as a secondary reason to visit the City has increased significantly over time from 22% in 2009 to 29% in 2012 and 37% in 2013.

WEEKDAY VS. WEEKEND

During the week, work accounts for a large proportion of visits (32%), this is followed by shopping (21%, a significant decrease from 30% in 2012) and study (12%). The largest proportion of City users (34%) visit on a weekend for shopping (down slightly from 2012), followed by meeting friends (17%). Visiting the City for work on a weekend is identical to previous years at 9%. On a weekend 'dining/entertainment' as the main reason for being in the City remains stable at 10% in 2013, although since 2005 this category has shown a slow but gradual decline.

TRAVELLING TO AND WITHIN THE CITY

Car is the most common mode of transport with just over two in five travelling to the City by car. Just over one quarter of all City users travel to the City by bus and one fifth walk or ride a bike. Those travelling by car have had minor fluctuations over time, although public transport use has shown a slow and gradual decline since 2007.

AGE DISTRIBUTION

In 2013, age group proportion is similar to results seen in 2012. Those aged 15-24 and 25-34 hold the largest proportions (both 22%), and the proportion of City users gradually declines by increasing age category.

POSTCODE

Over half of our City users visit from the inner suburbs. Results have had minor fluctuations over time but have stayed largely consistent.

RESIDENTS
AN OVERVIEW

CITY RESIDENT PROFILE

Note A total of 261 residents were interviewed throughout September 2013.

GENDER

The gender breakdown of residents interviewed was 47% female and 53% male.

AGE BREAKDOWN

The age breakdown of residents in the 2013 study contains slightly more respondents aged under 35, and slightly fewer respondents aged over 55 than in the 2012 research.

OCCUPATION

55% of City residents were in paid employment, with roughly one third (31%) employed in positions described as senior management or professional. 45% of City residents were not in paid employment, of which 22% describe themselves as primarily students.

The occupational breakdown of City residents in 2013 is very similar to 2012.

FULL-TIME AND PART-TIME BREAKDOWN

Of the City residents surveyed who are either in or looking for paid work, 81% are full-time, with the remaining 19% in or looking for part-time work.

HOUSEHOLD COMPOSITION

Lone person households and group households (35% and 34% respectively) constituted the most common household types. The latter category has significantly increased by 15% since 2012, likely due to the increasing representation of younger residents. A smaller proportion of respondents indicated their household consisted of an older couple without dependent children (11%, a significant decrease from 23% in 2012) or belonged to households consisting of a younger couple without children (8%).

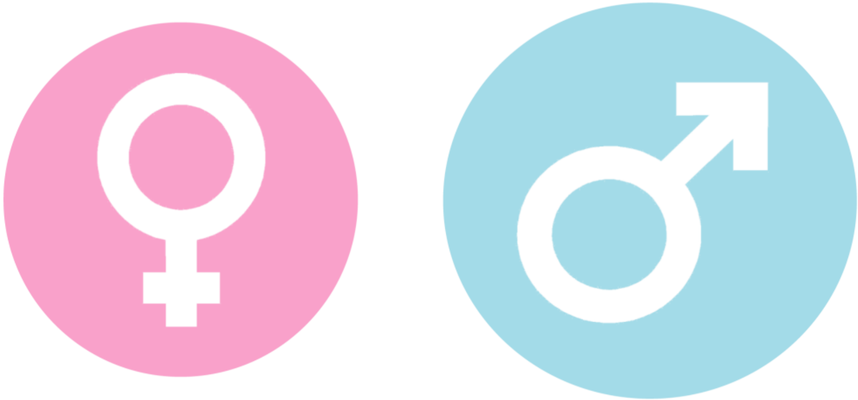
Members of households with children were much less likely to be City residents.

WEEKLY GROSS HOUSEHOLD INCOME

Just under one quarter of residents involved in the survey reported that they belong to households which have a gross weekly income of $2000 and over. There appears to be minor fluctuations within income brackets over time, although this is not considered significant.

COUNTRY OF ORIGIN

As expected, the highest proportion of survey respondents were born in Australia (62%), followed by England (10%).



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

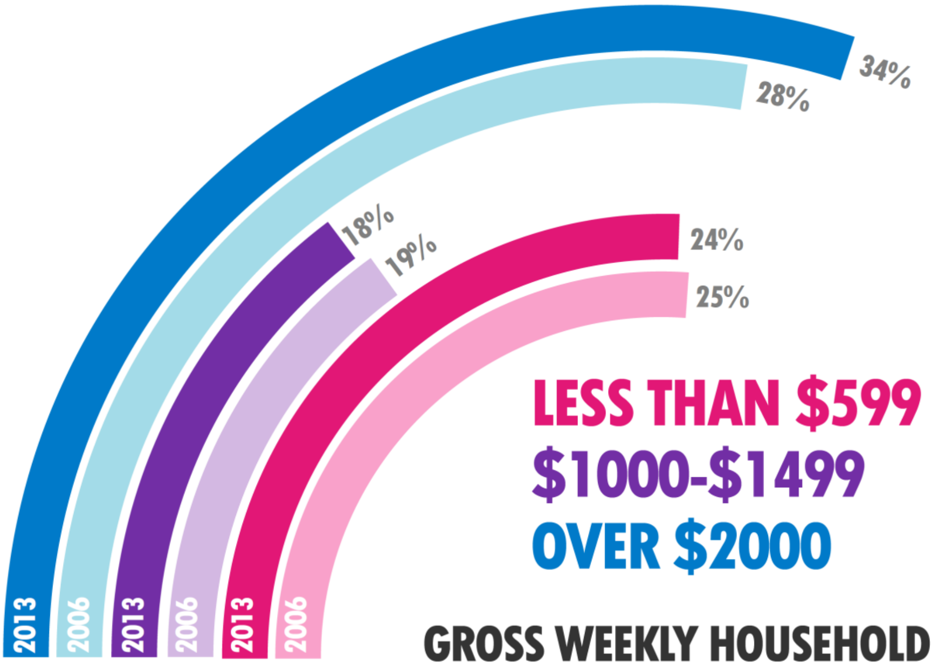
19% WORK PART TIME — TRENDING DOWN

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)



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.

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. All City residents (100%) shop within the city at least once per year, which has increased from 92% in 2012. 90% of City residents use the City for other reasons at least once per year and three quarters visit the parklands at least once per year. 38% claim to work within the city.

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 slightly (although not significantly) more likely to be undertaking leisure activities such as shopping, meeting friends, dining or some form of entertainment, while other City users were more likely to be working.

TRAVEL

City residents are most likely to travel within the City on foot (72% walked to their City on their last visit compared to 69% in 2012), a strong and increasing trend since 2008. 16% of residents drove to their City activity, a significant drop from 26% in 2012. These results indicate that promotion of cycling and walking is working, although the change may also be influenced by the higher number of younger respondents within the resident sample and measures to improve the safety and convenience of cycling and walking across the City.

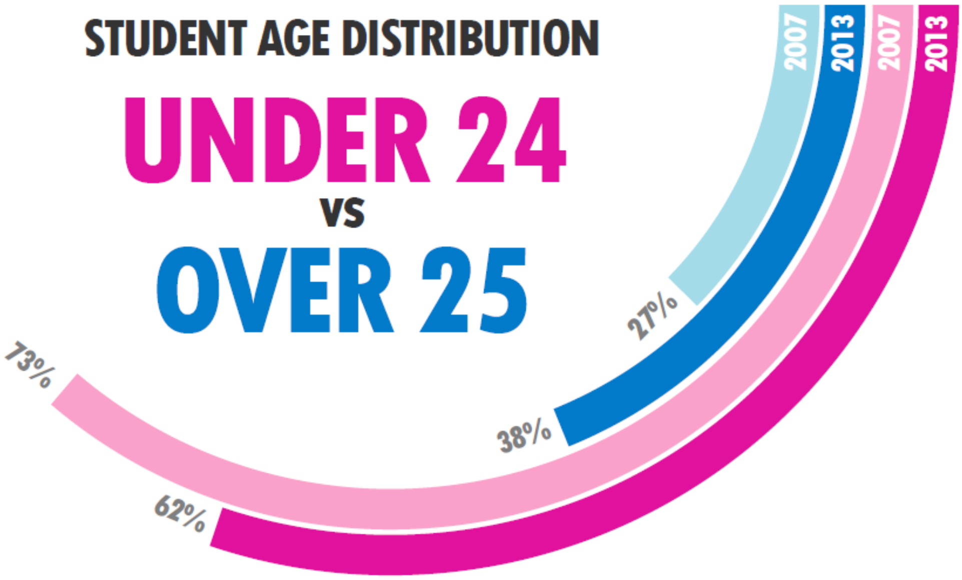
PHYSICAL ACTIVITY LEVELS

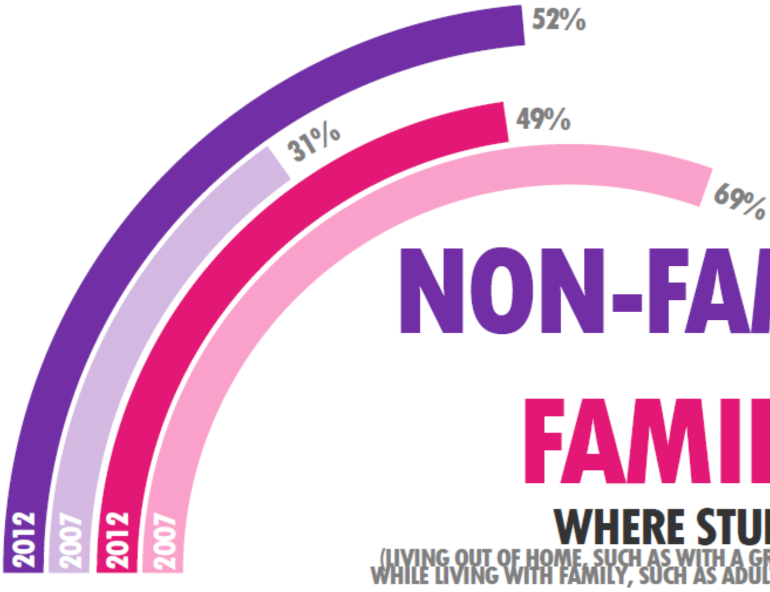
In 2012 residents were asked how often they undertook 30 minutes of moderate to vigorous physical activity within the City. Positively, 51% undertook exercise at least a couple of times a week (32% undertake exercise daily). However, 26% indicated they never do this, and 1% only a couple of times a year. In contrast to all City users, City residents undertake significantly more physical activity in the City.

STUDENTS
AN OVERVIEW

STUDENT AGE DISTRIBUTION

UNDER 24
vs
OVER 25

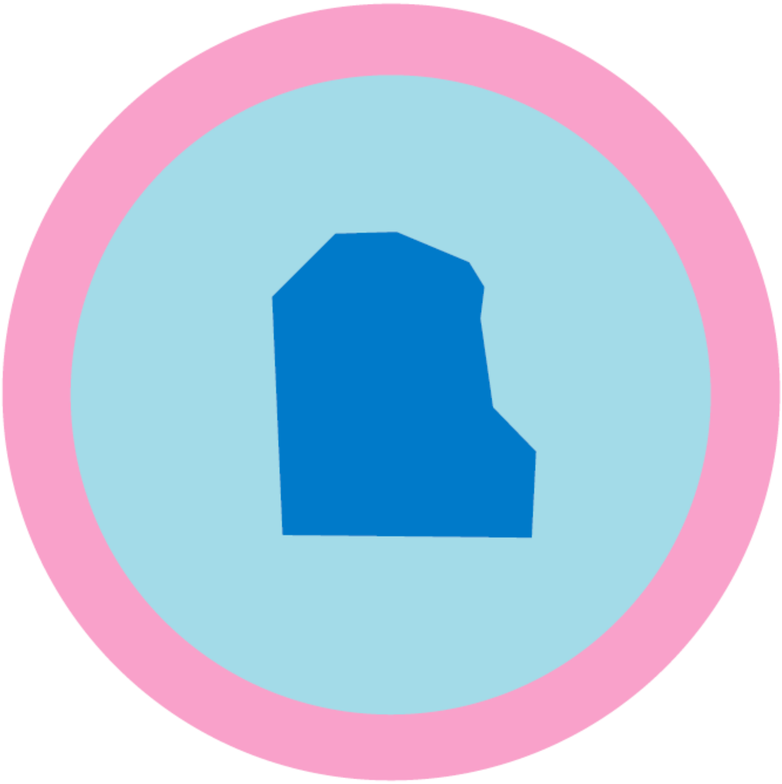




NON-FAMILY HOME
vs
FAMILY HOME

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 STUDENT PROFILE

Note that of the 2009 respondents interviewed across various days and locations throughout the City, 354 people indicated they studied in the City.

GENDER

Slightly more City students were female in 2013, which has remained consistent over time.

AGE DISTRIBUTION

The majority of City students are aged 15-24. In 2012 the proportion of 15-24 year olds reduced considerably and in 2013 has remained stable.

HOUSEHOLD COMPOSITION

The proportion of City students living in group households has remained consistent in 2013, with 30% of City students living in group accommodation. Family households have increased in 2013 due to the increase in adult children at home. It is likely many respondents within this category are adult children themselves and are remaining within their childhood home until studies are completed. Students within the City are less likely to be 'empty nesters' or have pre-school / primary school aged children.

OCCUPATION

75% of students have no other occupation other than being a student, reflecting results seen before 2012. Slight rises in the proportion of students working in management/clerical roles and skilled labour in 2012 have also returned to previous levels.

POST CODE

City students tend to travel in from the inner suburbs (61%) although a reasonable proportion live in the outer suburbs (19%) and the City (17%). This proportion of students residing in the City increased in 2012 and remained relatively unchanged, while outer north student numbers have returned to results seen in 2008.

CITY USAGE AMONG STUDENTS

Nearly all students use the City for shopping at least once a year. The proportion of City students using the Park Lands dropped to 50% in 2012 although returned to 63% (similar levels to 2008) in 2013, indicating the 2012 figure may be an anomaly. The proportion of students who also work in the City has fluctuated over time but has remained relatively stable overall.

FREQUENCY OF USING THE CITY

As expected, study is clearly the most frequent 'purpose' for visiting the City with 60% of City students being in the City daily/most days for study purposes and just over a third visiting 1-3 times a week.

FREQUENCY OF BEING IN THE CITY FOR SHOPPING

The frequency of City students being in the City for shopping has remained relatively consistent in 2013. Just under 60% of students shop within the City at least once a week.

FREQUENCY OF BEING IN THE CITY FOR WORK

Just under one quarter (23%) of students stated they are using the City for work purposes at least a couple of times per week. 72% suggested they are never in the City for work, a slight increase from 2012.

FREQUENCY OF BEING IN THE CITY FOR LEISURE OR ENTERTAINMENT

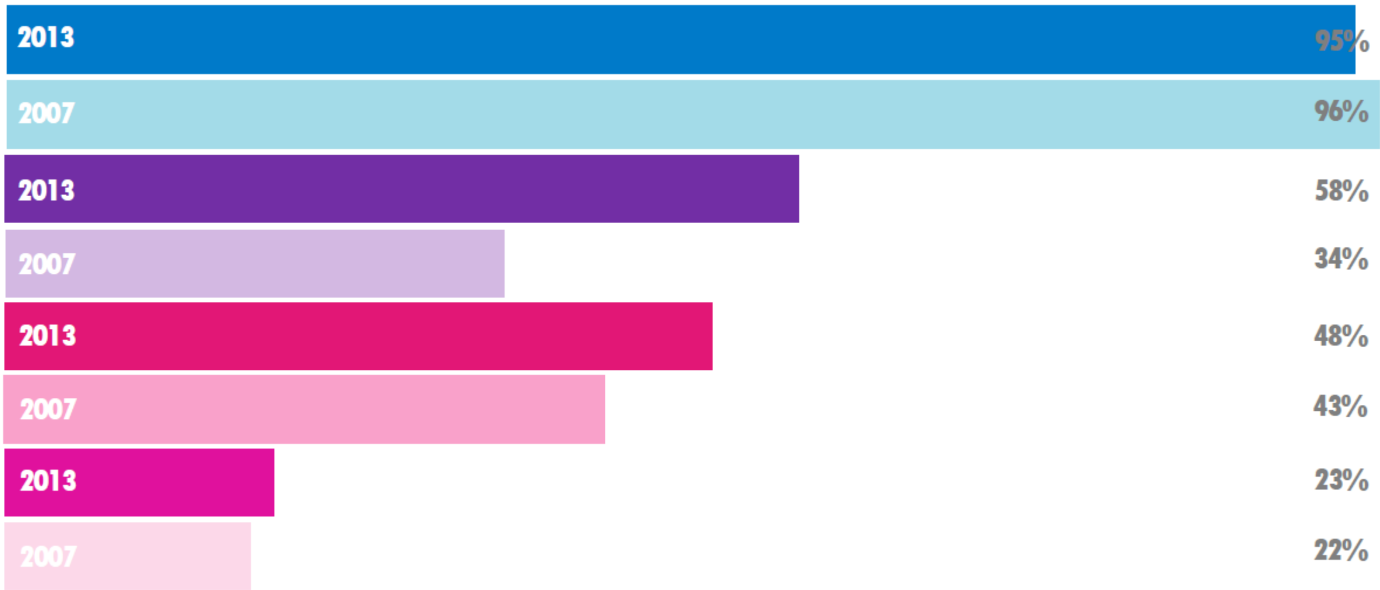
Almost half of City students visit the City for leisure purposes at least weekly. There is, however, a growing group of students who never visit for leisure or entertainment.

TRAVEL TO THE CITY

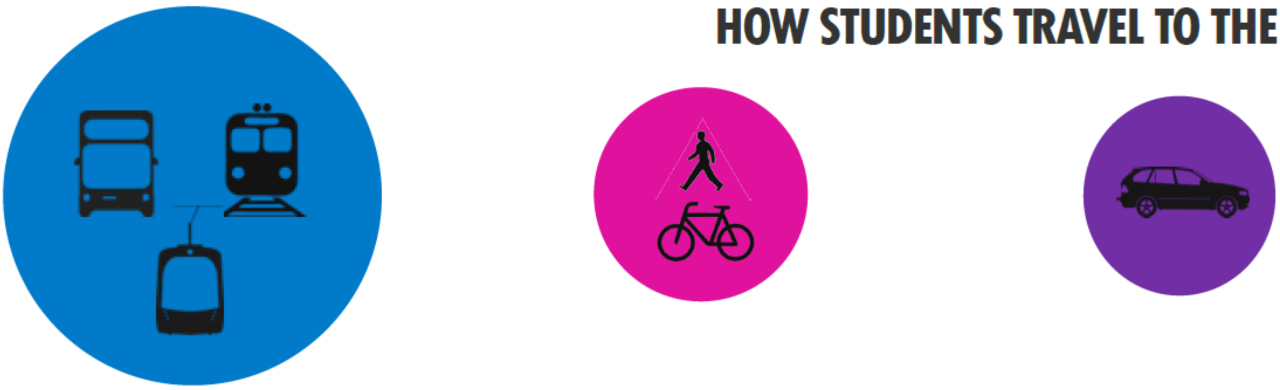
A high proportion of City students walk (20%) or cycle (5%), reflecting their inner City living. 60% of City students utilise public transport, with the bus being the most popular form.

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

WORKERS
AN OVERVIEW

CITY WORKER PROFILE

Note of the 2009 respondents interviewed across various days and locations throughout the City, 694 people indicated they were in the City for work/business.

GENDER

Previous research has indicated more females than males working in the City. In 2013 the gender distribution is fairly even - 51% male and 49% female.

AGE

In 2013, the City's workforce is similar to 2012 and 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

In 2013 non-family households have remained prominent (59%). This is in line with the reduction of age of our City workers.

OCCUPATION

The City's workforce remains dominated by white-collar workers. In previous research there was a reduction in senior managers and an increase in clerical workers, but this trend has since been reversed. The proportion of blue collar workers and students is consistent with 2012.

Our City worker sample was made up of three quarters full-time workers and one quarter part-time, unchanged since 2012

CITY USAGE AMONG WORKERS

FREQUENCY OF WORKERS USING THE CITY

City workers are avid users of the City with most using the City for multiple purposes – 97% shop in the City, 69% visit the Park Lands and 88% visit for other reasons at least once per year.

In 2013, City workers who shop in the City, visit the City for other reasons and visit the Park Lands, have all increased from 2012.

Overall, over 86% of City workers are in the City daily / most days. As expected, 'working' is the most frequent purpose with over three quarters being in the City daily / most days for work purposes. 94% are in the City for work at least weekly.

FREQUENCY OF BEING IN THE CITY MAINLY FOR STUDY

12% of workers also use the City for study at least weekly.

FREQUENCY OF BEING IN THE CITY MAINLY FOR SHOPPING

In 2013 97% of workers use the City for shopping (identical to 2012, 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 convenience shopping.

FREQUENCY OF BEING IN THE CITY MAINLY FOR LEISURE OR ENTERTAINMENT

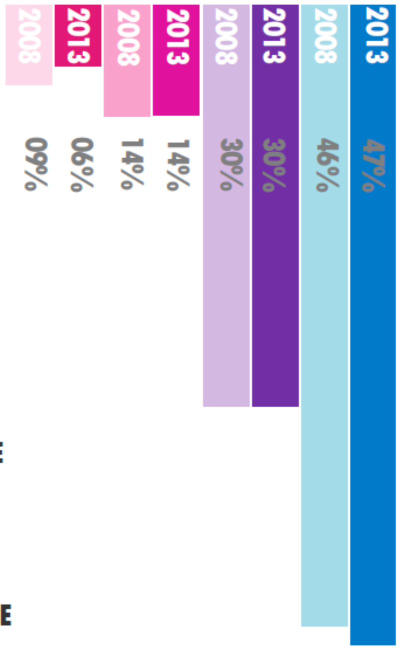
91% of workers use the City for leisure or entertainment at least once per year.

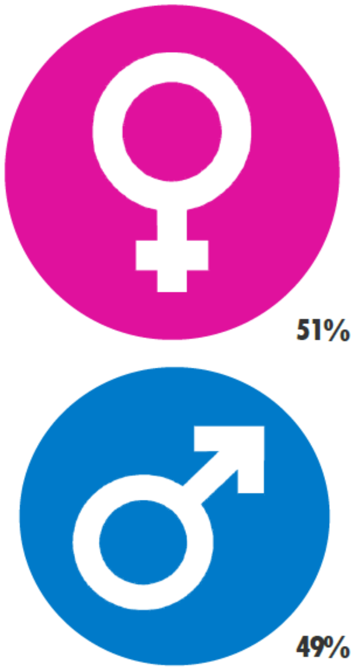
An increasing number of workers use the City for this purpose at least once a week, increasing from 21% in 2008, 33% in 2012 and 39% in 2013. These figures increase further for use at least once a month, increasing from 57% in 2008, to 66% in 2012 and 71% in 2013. Conversely, the proportion of those who never use the City for leisure or entertainment has been on the increase since 2008, although at a much slower rate (7% in 2008, 8% in 2012, 9% in 2013).

CITY WORKER OCCUPATION

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

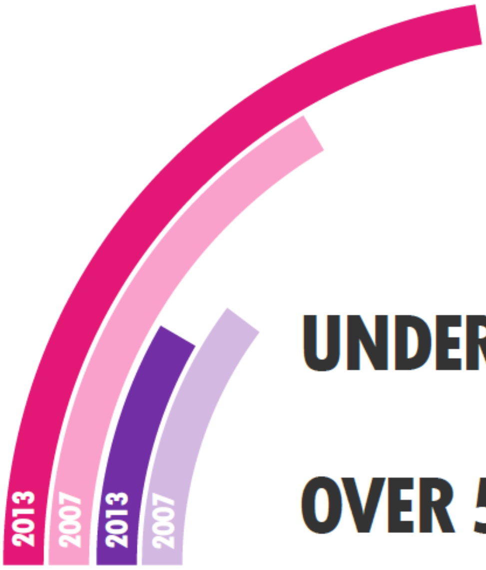
78% FULL TIME
22% PART TIME





51% FEMALE

49% MALE



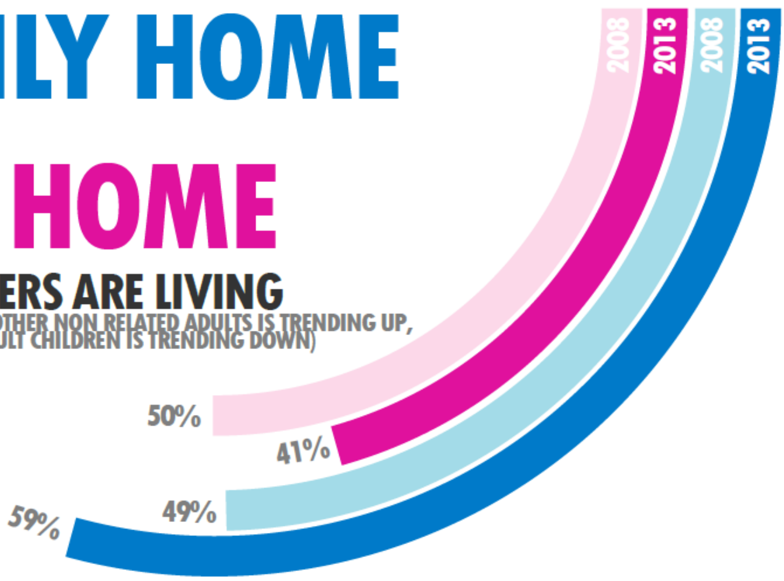
CITY WORKER AGE DISTRIBUTION

	2013	2008
UNDER 34	44%	32%
OVER 55	18%	23%

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)



WORKERS ARE IN THE CITY AT LEAST ONCE A WEEK FOR

94% WORK

50% SHOP

39% LEISURE

12% STUDY

VISITORS
AN OVERVIEW

CITY VISITOR PROFILE

Note: Visitors are defined as those who use the City for various reasons but do not 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

In 2013, among City visitors each gender is represented equally, steering away from the female bias seen in 2008.

AGE DISTRIBUTION

Before 2012, the proportion of 15-34 year olds who were City visitors had decreased over time. In 2012, one third of City visitors were aged under 35. This is unchanged in 2013.

HOUSEHOLD COMPOSITION

Just over half of City visitors come from households with children in residence. Those from lone person households and households comprising older couples with no children at home continue to make up the largest proportion of City visitors, closely followed by families with adult children at home. The proportion of visitors from households with children has increased slightly, while those from non-family households have decreased – although these movements are only minor.

OCCUPATION

The proportion of City visitors in paid work has gradually increased since 2007, while the proportion of visitors not in paid work decreased. 'Senior manager or professional' remain the most common occupation type for City visitors.

POSTCODE

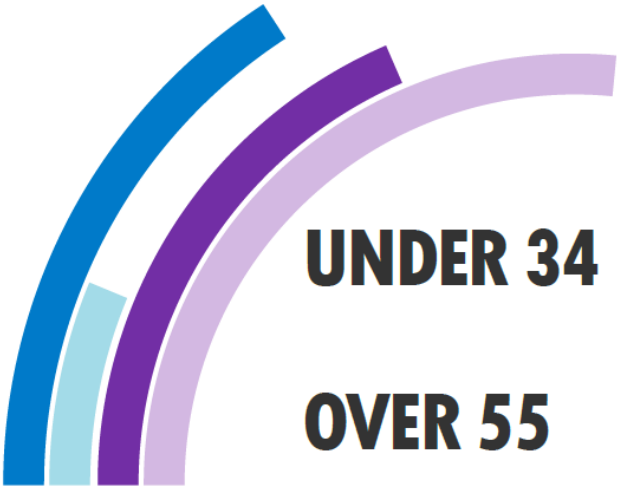
Half of City visitors reside in the inner suburbs while the other half visit the City from the outer suburbs, country SA and interstate. These results are consistent with the 2012 results. Results prior to 2012 are not comparable due to methodological changes implemented in 2012.

CITY USAGE AMONG CITY VISITORS

City visitors were asked how frequently they visit the City for different purposes. Overall, 65% of visitors visit the City at least once a month. Visitation frequency is higher for shopping trips than for leisure / entertainment.

50% FEMALE

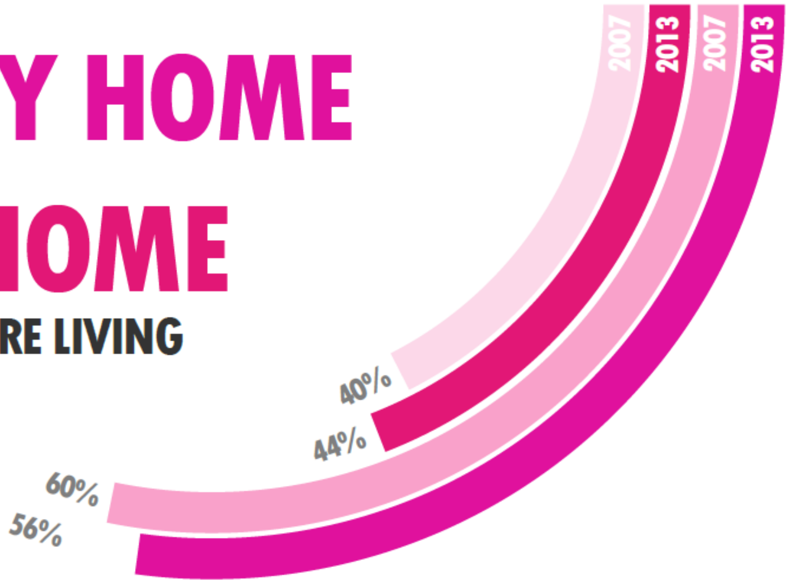
50% MALE



VISITOR AGE DISTRIBUTION

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

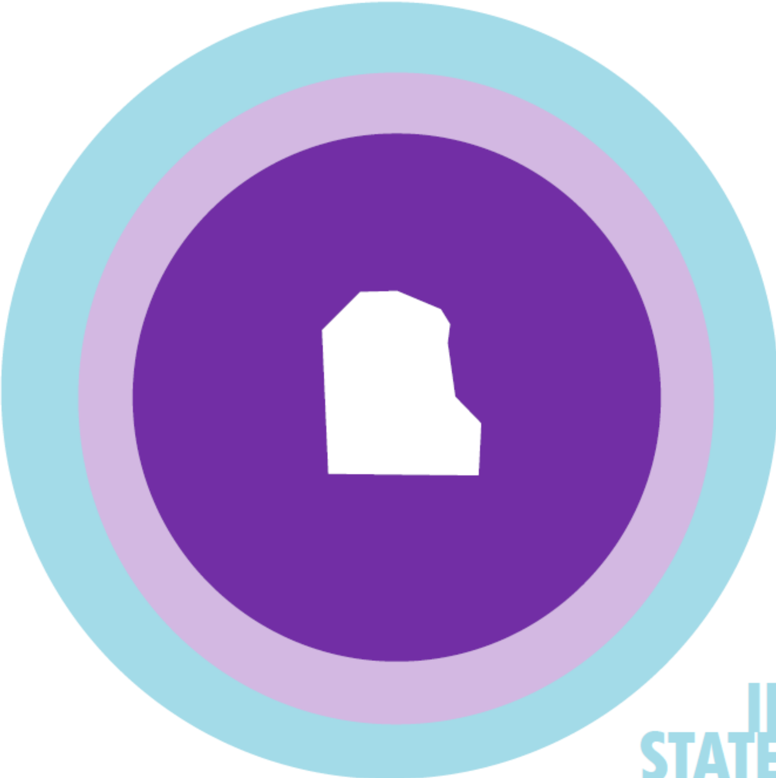
NON-FAMILY HOME
VS
FAMILY HOME
WHERE VISITORS ARE LIVING



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

FREQUENCY OF BEING IN THE CITY MAINLY FOR SHOPPING

Frequency of visiting for shopping has remained relatively stable since 2012, with just over one half shopping in the City at least once a month.

FREQUENCY OF BEING IN THE CITY MAINLY FOR LEISURE OR ENTERTAINMENT

70% use the City for leisure or entertainment, with 16% doing so at least weekly and 41% doing so at least monthly. There appears to be an increasing proportion of visitors who never use the City for leisure or entertainment but also an increasing proportion that use the City for leisure or entertainment at least once per month.

REASONS FOR BEING IN THE CITY

The main reason for visiting is shopping in the City. 26% specifically cite Rundle Mall for shopping. This was followed by meeting friends and dining and entertainment.

In all, 71% of visitors undertake shopping, 55% dining or entertainment and 36% meet friends. This indicates that it is typical for a visitor to undertake more than one of these activities on any one visit

HOW TRAVEL TO THE CITY

City visitors most popular mode of transport is public transport with just under half travelling by bus (47%), train (8%) or tram (5%). One quarter of City visitors walked or cycled, and just under one quarter used private transport. In 2012, the main transport used was car (either as a passenger or driver – 49%). This shift may indicate a positive change towards reduced car use and an increasing propensity for visitors to use public transport or to cycle or walk.

CONTACT
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