



City of Adelaide City User Profile Survey

August 2017



CITY OF
ADELAIDE

Contents

Background	3
Glossary of terms	4
Executive summary	5
2017 Snapshot of City users	6
What 'typical' City users may look like	8
General reasons for being in the City	10
Main reason for being in the City	13
Other reasons for being in the City	17
Travelling to the City	20
Frequency of visiting the City	23
Demographics	26
What our City users said	30

Background

Through its annual City User Profile Survey, the City of Adelaide continues to learn about the people who come into the City on any given day. This survey is a long-running study to understand who comes into the City, why they visit and how often they visit. In addition, the City User Profile Survey provides the City of Adelaide with the opportunity to talk directly to our City users to obtain their views on some of the current issues that are of strategic importance to the council.

Using the same methodology as previous years, over 2,000 responses were collected through a series of random 'on-street' intercept surveys over three weeks in May 2017. To ensure a wide coverage of City users, surveys were conducted throughout the week and on weekends at various times of the day and night and at multiple locations across the City and North Adelaide. An option to complete the survey in Mandarin Chinese was also available, of which nine surveys were received.

City of Adelaide City User Profile Survey 2017

Number of responses:

Total n = 2,005 (surveys in English n=1,996; surveys in Chinese n=9)

Fieldwork: 3rd – 23rd May 2017

Margin of error (95% C.I.): +/-2.1%

The City User Profile Survey has been undertaken by the City of Adelaide once every one to two years since 2002 when it originally started out as customer satisfaction survey. Up to 2012, surveying was conducted over the phone. However, the methodology was changed to an on-street intercept method to better capture the profile of people who were physically in the City.

Since 2015, the City User Profile Survey has been held annually. Over time, the focus of the survey has shifted away from measuring customer satisfaction to understanding the demographic and behavioural profile of our City users. The information gathered from the surveys and findings in this report help to inform council decision-making and planning for the delivery of future services. The data gathered from the survey is also used to track the progress of some of the objectives in the *City of Adelaide's 2016-2020 Strategic Plan*.

Glossary of Terms

City user

anyone who visits the City for any reason during the survey period

City worker

refers to City users who indicated that they work in the City at any time, not just on the day of the survey

City student

refers to City users who indicated that they study at a City campus at any time, not just on the day of the interview and includes secondary as well tertiary institutions

City resident

refers to City users who live in the suburbs of Adelaide (postcode 5000) or North Adelaide (postcode 5006)

City visitor

refers to City users that do not live in the City and who come to the City for reasons other than to work or to study

Inner suburbs

refers to postcode areas that fall within a 10km radius of the City centre

Please note that except for City visitor, an individual can identify with more than one user type e.g. be a City resident as well as a City student.

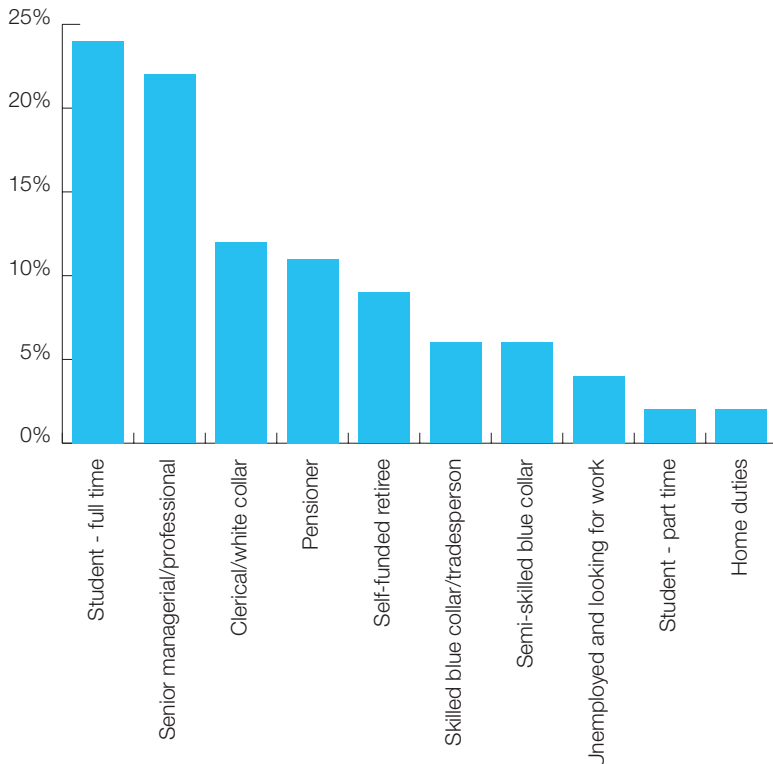
Executive Summary

Key Findings

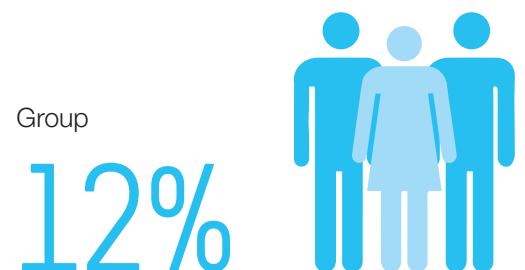
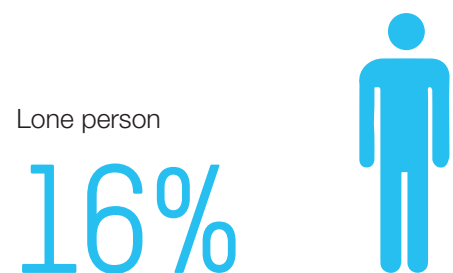
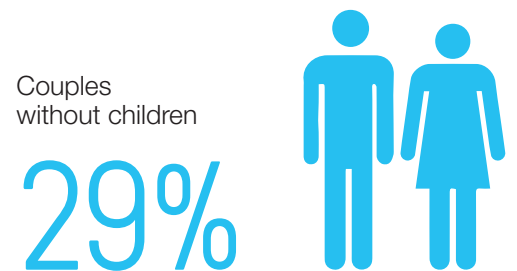
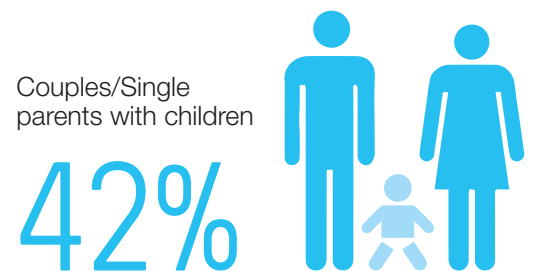
- The age of our City users in 2017 is largely consistent with the results of the previous surveys with 15 to 24 year olds accounting for the largest group at 29%. There was also a greater number of City users aged 65 and over, making up 18% of all City users, compared to 11% in 2016.
- Similar to previous years, just over half of City users lived in the inner metropolitan suburbs, 18% lived in the outer metropolitan area and around one in ten lived in the City.
- More than two-thirds of City users:
 - > Shopped in the city at least once a year; and
 - > Visited the City for leisure or entertainment at least once a year.
- Nearly half visited the City in the evening at least once a year.
- Approximately one in ten City users were tourists or visitors staying in short-term accommodation.
- The household composition of our City users is stable though there has been a slight trend upward in households that have adult children still living at home.
- People were also visiting the City less frequently – the proportion of City users who visited the City daily or most days of the week declined over the year from 50% to 41%.
- City users were mainly in the City to work, to shop or to study, as well as for dining or entertainment activities.
- Compared to 2016, the number of people who came into the City mainly for work has decreased, while the number of people who come into the City mainly to study has increased. A decrease in the proportion of people coming into the City mainly for work is consistent with the findings of the 2016 Adelaide City Census of Land Use and Employment (ACCLUE) that showed a decrease in the number of people employed by City businesses.
- The trend towards public transport as a way of getting into the City, as opposed to coming in by car, continues upward with one in two City users catching the bus, train or tram into the City.

2017 Snapshot of City users – Key demographics

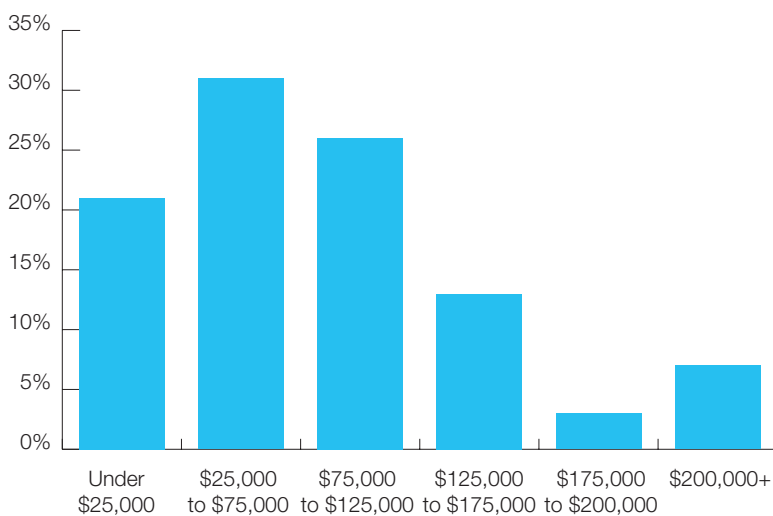
Occupation



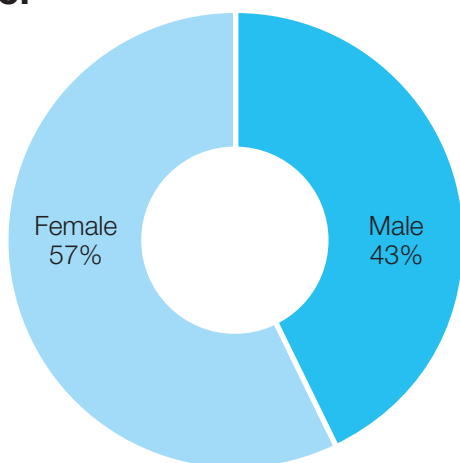
Household Type



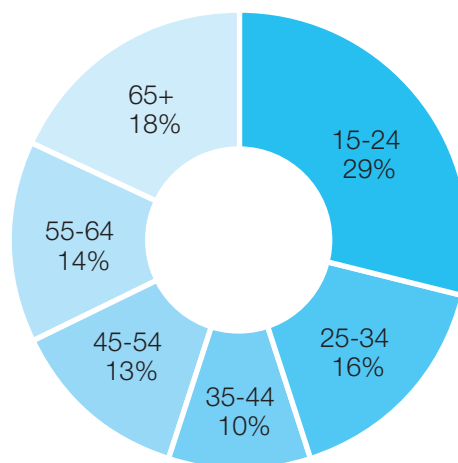
Gross Annual Household Income



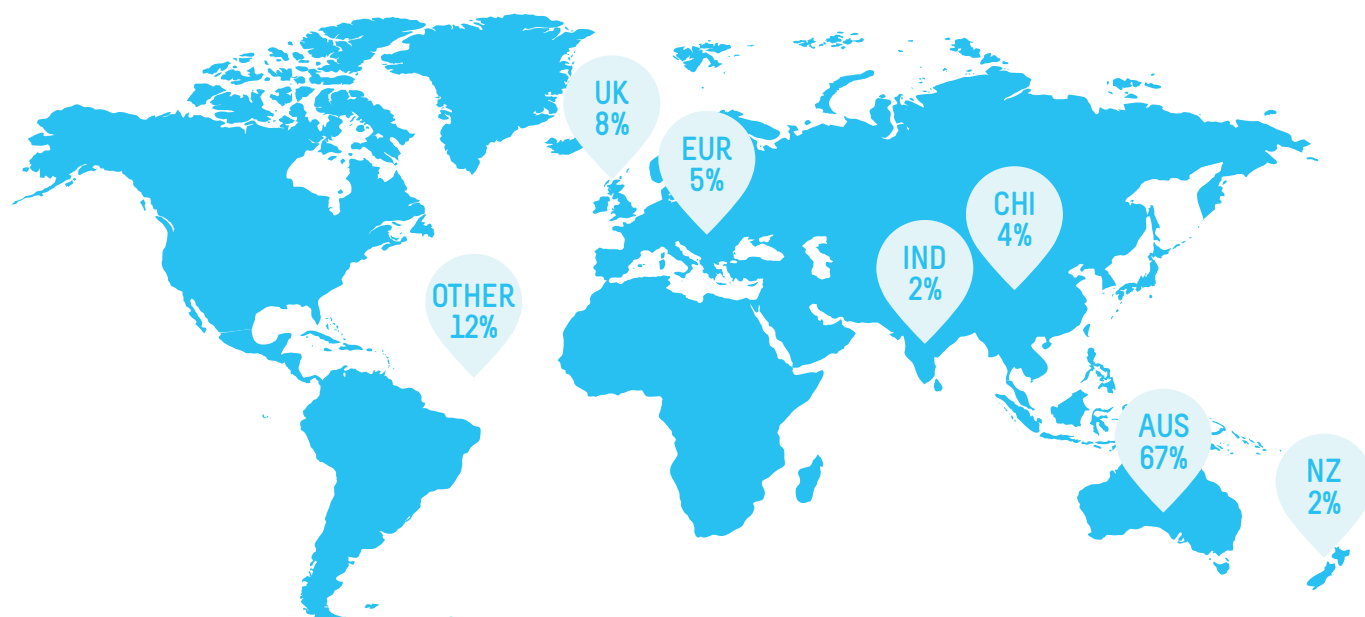
Gender



Age



Country of Birth



What 'typical' City users may look like



City Worker – Elise, 34

- Working in a professional role in the Public Administration and Safety or Healthcare and Social Assistance sectors
- Lives with her partner, no children
- Lives in the inner metro area
- Likes to shop in the City at least once a week and visits the City at least once a week for leisure or entertainment
- Is health-conscious - goes to the gym or is likely to be doing informal exercise such as walking, running or cycling in the City
- Enjoys after work drinks in one of the City's many small bars most weeks



City Student – Mai, 21

- Studying full-time at a City campus
- Catches public transport to the City
- Visits the City at least once a week to shop
- Lives with her parents in the inner metro area
- Likes to shop or meet friends for a coffee in Rundle Mall
- Usually in the City on a Wednesday or Thursday
- Born overseas
- In addition to studying, also works part-time in hospitality

**Stock photography used*



City Resident – Brad, 30

- Thinks that Council is doing a good job in beautifying streets, squares and Park Lands
- Is a fan of the Park Lands, likes to visit for informal exercise such as jogging or for a picnic or a barbecue.
- Environmentally and ethically conscious – likes to shop at local markets around the City. Also walks as his main mode of transport.
- Shops in the City at least once a week
- Most likely of all user types to be going to City libraries or a local community centre
- Lives alone



City Visitor – Cheryl, 53

- Visits the City most weeks to meet up with friends or for personal appointments
- More likely to be visiting the City on the weekend
- Likes to spend money in the City, especially for shopping
- Lives with her partner in the inner metropolitan suburbs, kids have left home
- Doesn't work and doesn't usually come into the City after 5pm
- Usually comes to the City by car, either as a driver or a passenger
- Favourite places to go in the City are Rundle Mall or the Adelaide Central Market



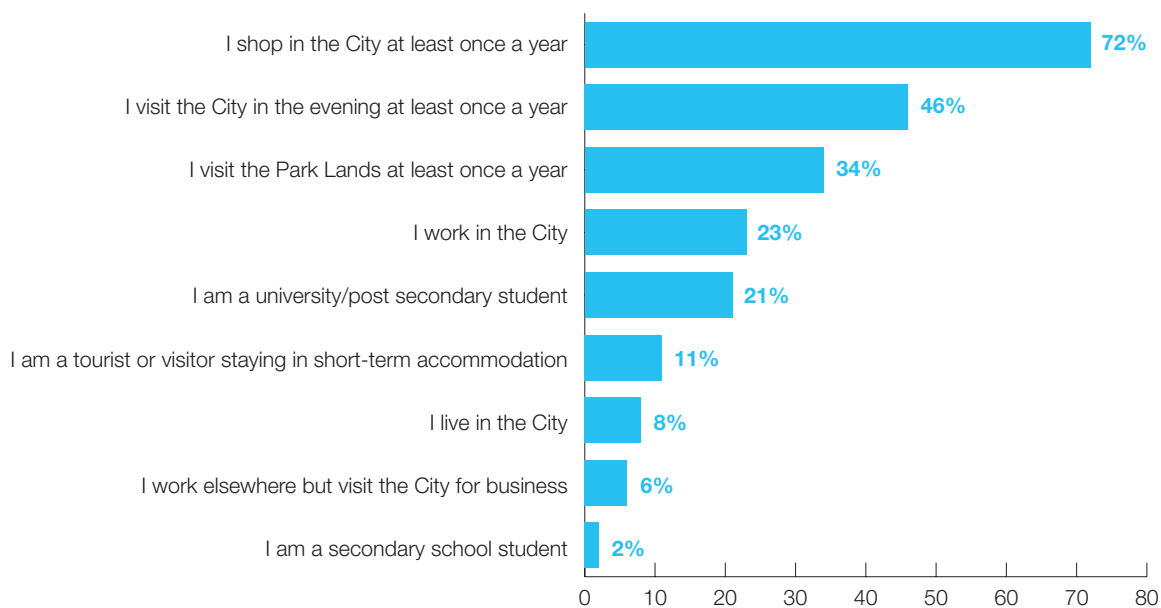
General reasons for being in the City

People come into the City for many different reasons.

To get an understanding of all the reasons for visiting the City, we asked why City users came into the City in general. We found that City users would visit for a number of reasons such as shopping, visiting the Park Lands, working or studying.

The 2017 survey found that close to three-quarters of City users shopped in the City at least once a year while nearly half visited the City in the evening at least once a year. Around one in four City users worked in the City while one-fifth were studying at TAFE or university. One in ten City users were tourists or visitors staying in short-term accommodation.

Figure 1 - General reasons for visiting the City

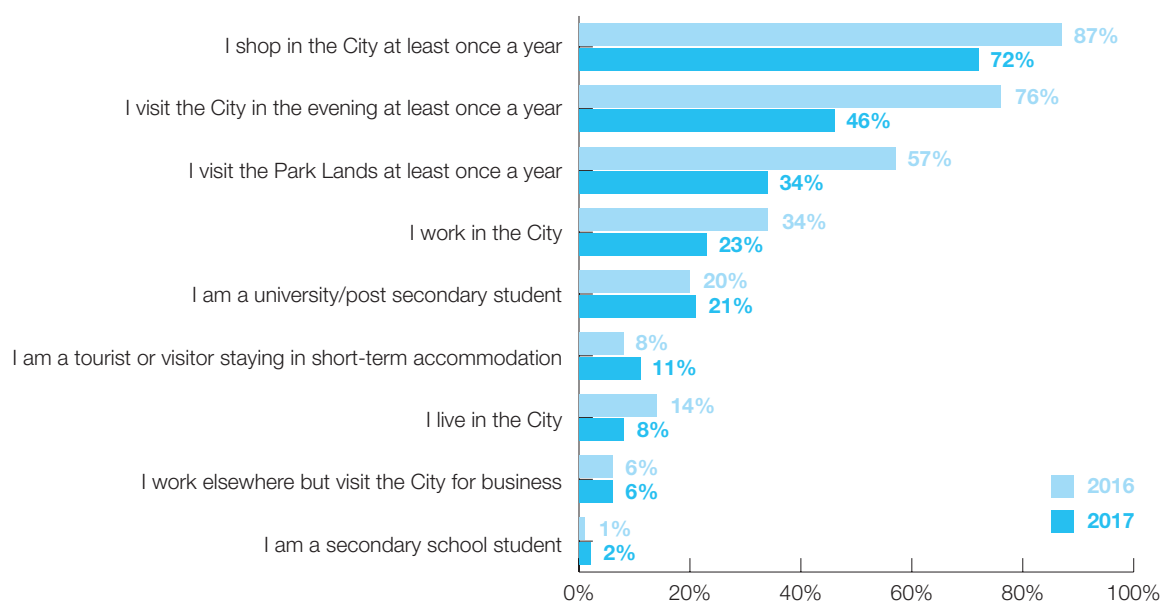


Question: Why do you visit the City? (at any time, not just today)? (Multiple responses)

Base:(n=2,005)

While shopping and visiting the City in the evening continue to be the most popular activities for City users, the proportion of City users undertaking these activities has declined in 2017 compared to 2016. The proportion of people who visit the Park Lands has also decreased, as has the proportion of those who said that they work in the City.

Figure 2: General reasons for visiting the City - comparison

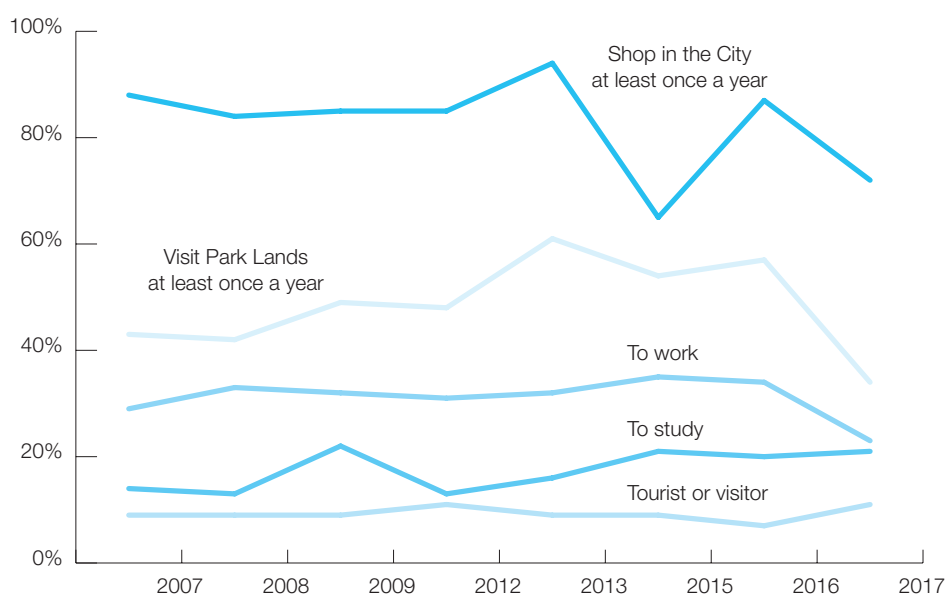


Question: Why do you visit the City? (at any time, not just today)? (Multiple responses)

Base: 2017(n=2,005); 2016(n=2,004)

The graph below shows the trends since 2007 for all the reasons that people come into the City. Consistent with the results presented previously, there has been a downward trend in the number of City users visiting the Park Lands, shopping, and coming in for work, while the proportion of people studying in the City and short term visitors have remained the same.

Figure 3: General reasons for visiting the City - trend



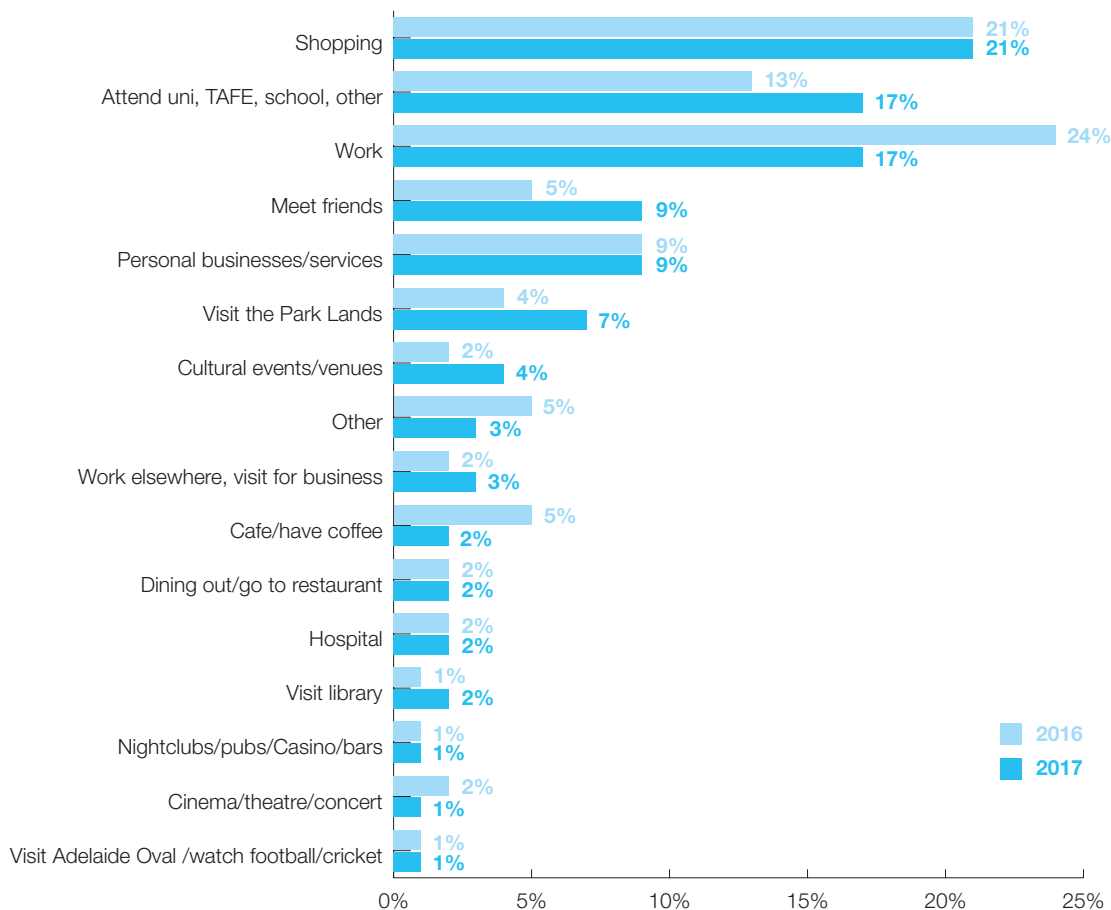
Question: Why do you visit the City? (at any time, not just today)? (Multiple responses)



Main reason for being in the City

City users were also asked about the main reason for being in the City on the day they were surveyed. While the activities that City users were undertaking were varied, the top three activities in 2017 were shopping (21%), attending TAFE or university (17%), and working (17%). This is very similar to the results of last year's survey though there have been some slight changes to the popularity of the activities. In 2016, the most popular main reason for being in the City was work, followed by shopping, and attending TAFE or university. People who came into the City mainly for work on the day fell from 24% in the previous year to 17% in 2017. In contrast, City users who were in the City mainly to study on the day increased from 13% to 17%.

Figure 4: Main reason for being the City - comparison



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

Base: 2017(n=2,005); 2016(n=2,004)

The following graphs show the trends over time in the main reasons for people coming into the City. Since 2004, there has been a downward trend in the number of City users who come in mainly to shop although over the last three years, this number has remained stable at 21%. The proportion of City users who came into the City mainly for work has also declined with this figure reaching an all-time low in 2017 of 17%. This is consistent with the findings of the City of Adelaide's Census of Land Use and Employment (ACCLUE) 2016 where the number of part-time and full-time workers employed by businesses in the City was 5% less than reported in ACCLUE 2014.¹

In contrast, there has been growth in the proportion of City users who are mainly in the City for study, reaching a high of 17% in 2017, equal to the number of City users who said they were in the City mainly for work. This is not surprising considering the growth of the education sector for South Australia and for Australia since 2004.

Other main reasons for coming into the City, such as meeting friends or coming in for personal appointments, have remained relatively consistent over time. The number of people coming in mainly for dining or entertainment purposes has grown and also reached its highest level in 2017 at 10%.

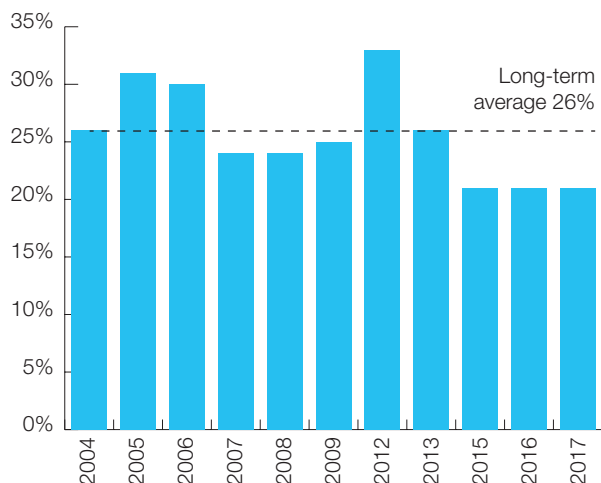
City users who came in on the weekend were more likely to be in the City mainly for shopping, dining and entertainment, or visiting for recreational purposes. The survey also found that City users were more likely to shop in Rundle Mall on a weekday, but more likely to shop at the Central Markets on a weekend. City users who were in the City mainly to visit to cultural venues like the Art Gallery were more likely to do so on a Sunday, as were those who were coming into the City mainly to visit the Park Lands.

Those in the City mainly to study or work were more likely to be doing so on a weekday, with City students more likely to be in the City on a Wednesday or a Thursday. Around 60 City users provided some other main reason for being in the City on the day. These included being on holiday, visiting family members, being in transit or doing volunteer work.

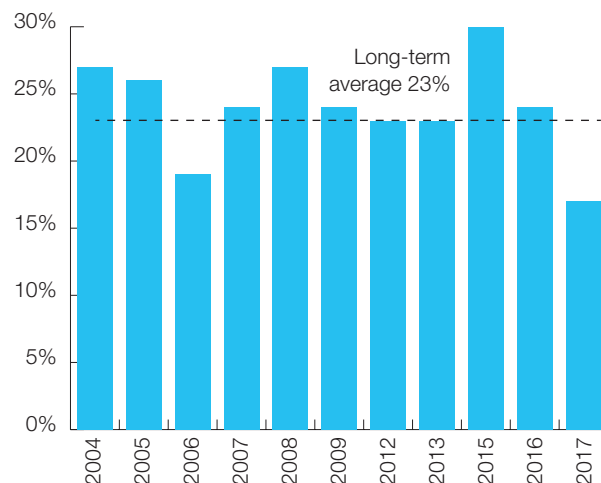
¹ City of Adelaide, 2016, Census of Land Use and Employment, <http://www.cityofadelaide.com.au/city-living/welcome-to-adelaide/city-facts-and-figures/>

Figure 5: Main reason for being the City - trends

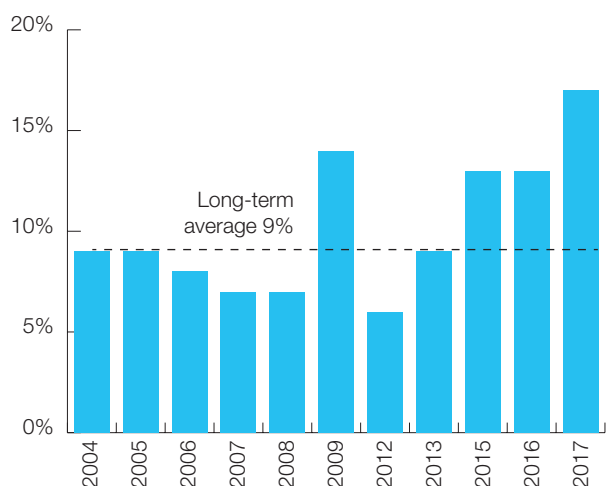
Shopping



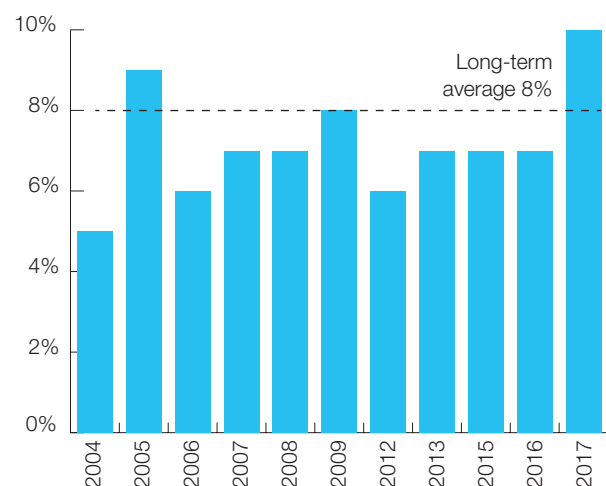
Work



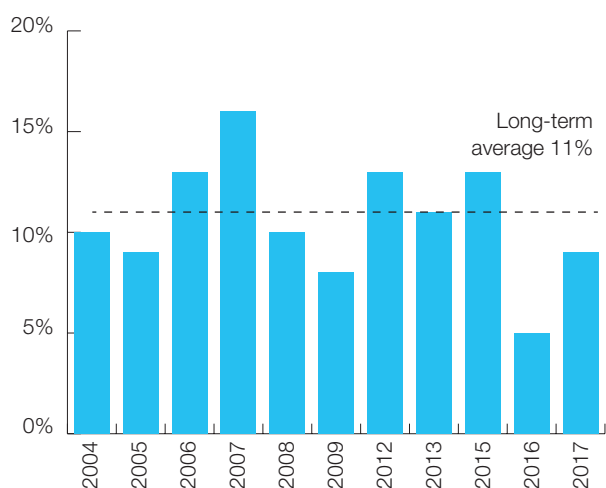
Study



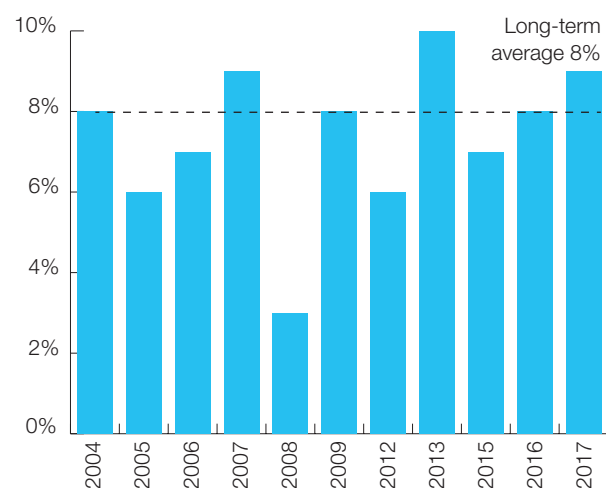
Dining/entertainment

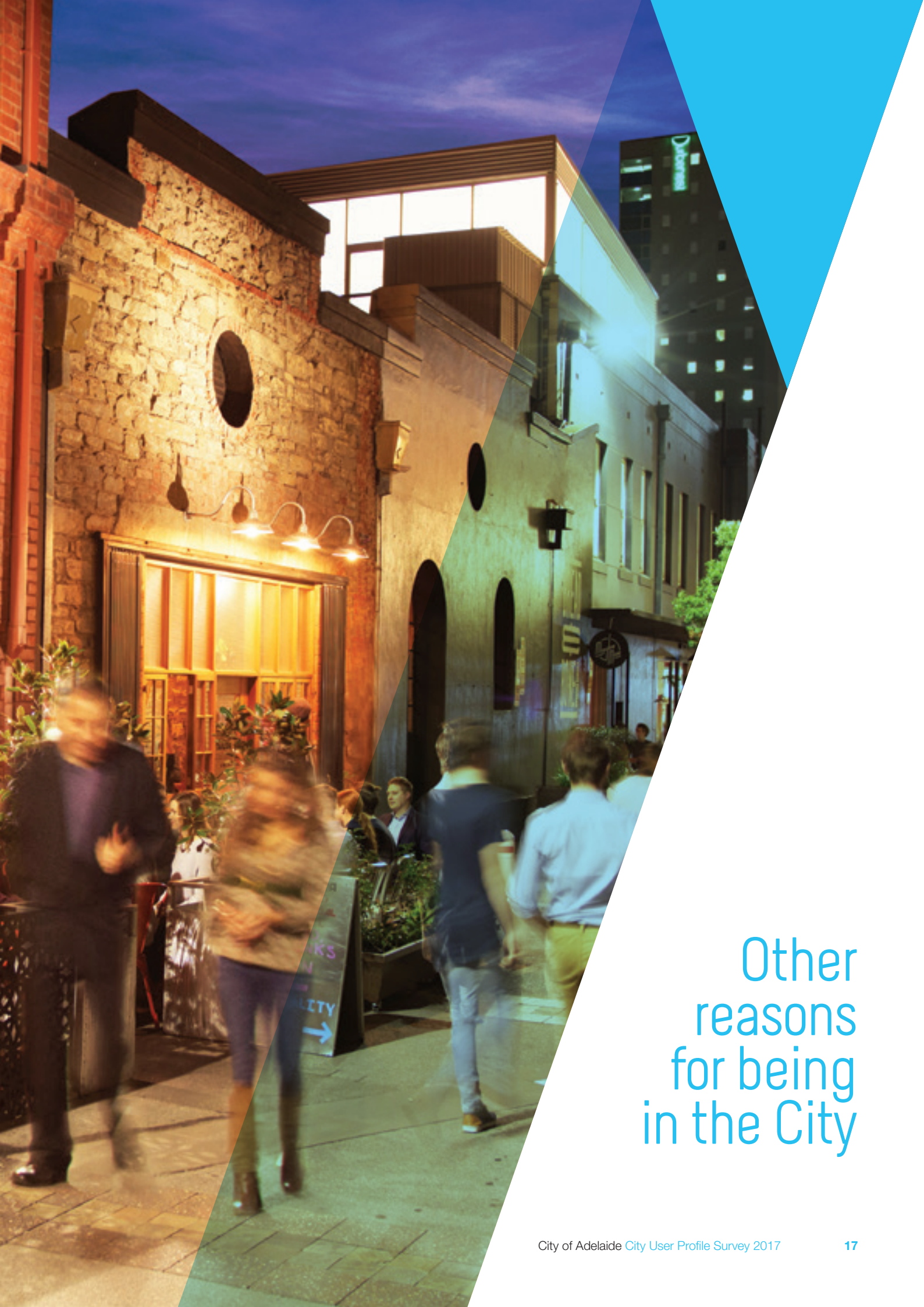


Meet friends



Personal business/services

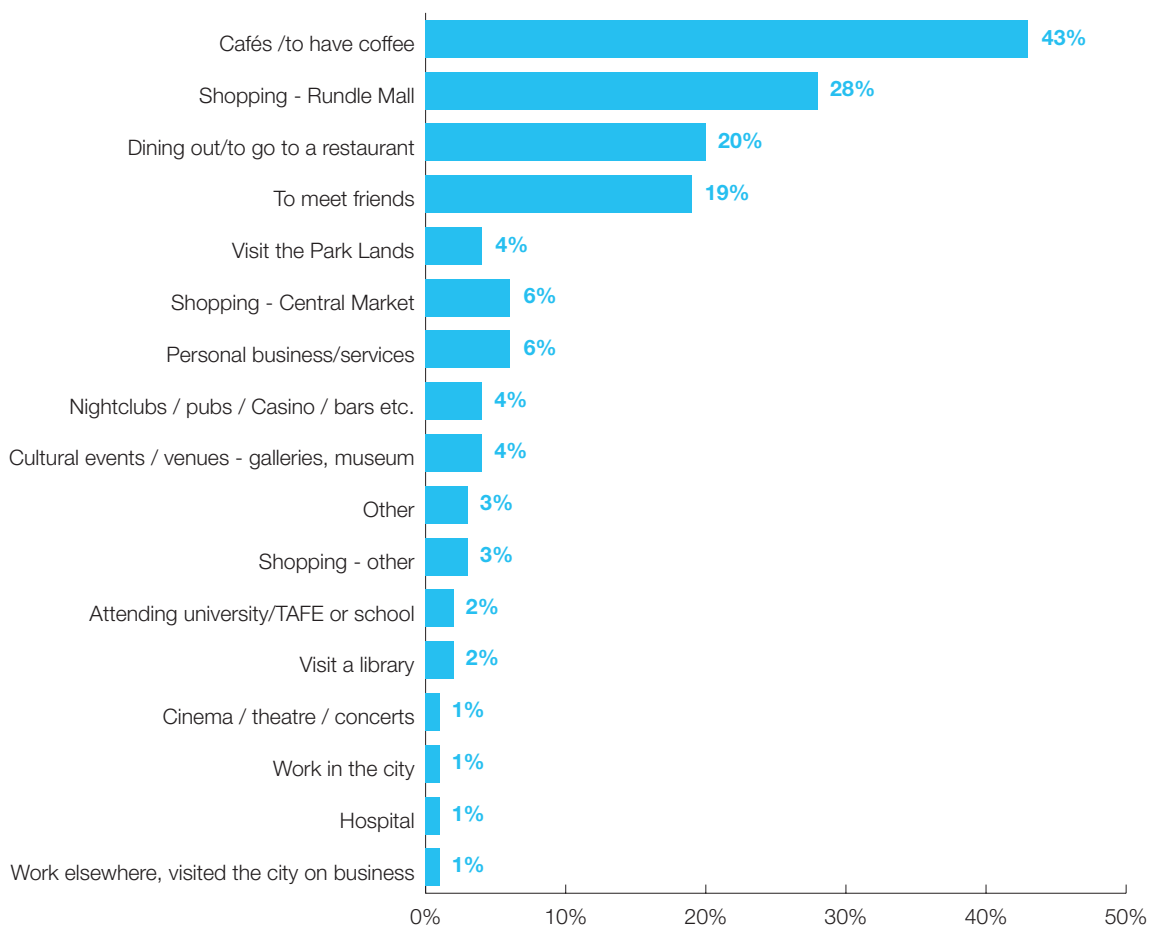




Other reasons for being in the City

Many City users undertook more than one activity on the day they were surveyed, with only one in ten City users indicating that they didn't do anything else apart from their main activity. Popular secondary activities for City users include going to cafes or having a coffee, shopping in Rundle Mall, dining out or going to a restaurant, and meeting friends.

Figure 6: Secondary reasons for visiting the City



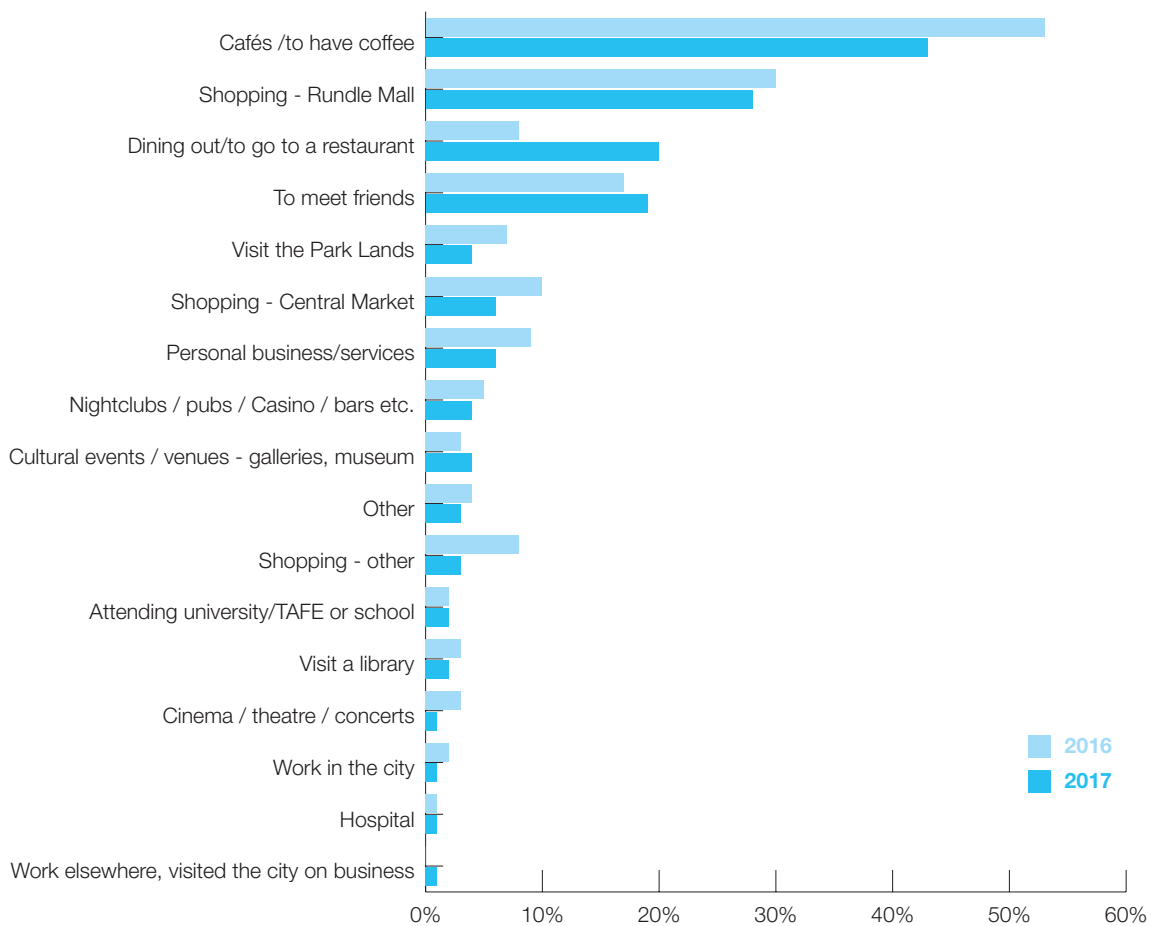
Question: What else, if anything, have you done, or will you do, while you're here? (multiple responses)

Base: 2017(n=1,817),2016 (n=1,624)

Looking at different groups of City users, City students were more likely to be shopping in Rundle Mall as well as studying, while female City users were more likely to be shopping in Rundle Mall and dining out. Interestingly, shopping in Rundle Mall and dining out were more likely to happen on weekdays than on weekends. This suggests that City users tend to undertake these activities while they are already in the City rather than come in especially.

Compared to 2016, there were significantly fewer people in 2017 who indicated that they did nothing else apart from their main activity. Of the City users who said that they undertook a secondary activity on the day, 20% said that they would be dining out or going to a restaurant, compared to 8% in 2016. In contrast, 43% of the City users who undertook a secondary activity on the day said they were going to a café or having a coffee, down from 53% in 2016.

Figure 7: Secondary reasons for visiting the City – comparison



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

Base: 2017(n=1,817), 2016 (n=1,624)



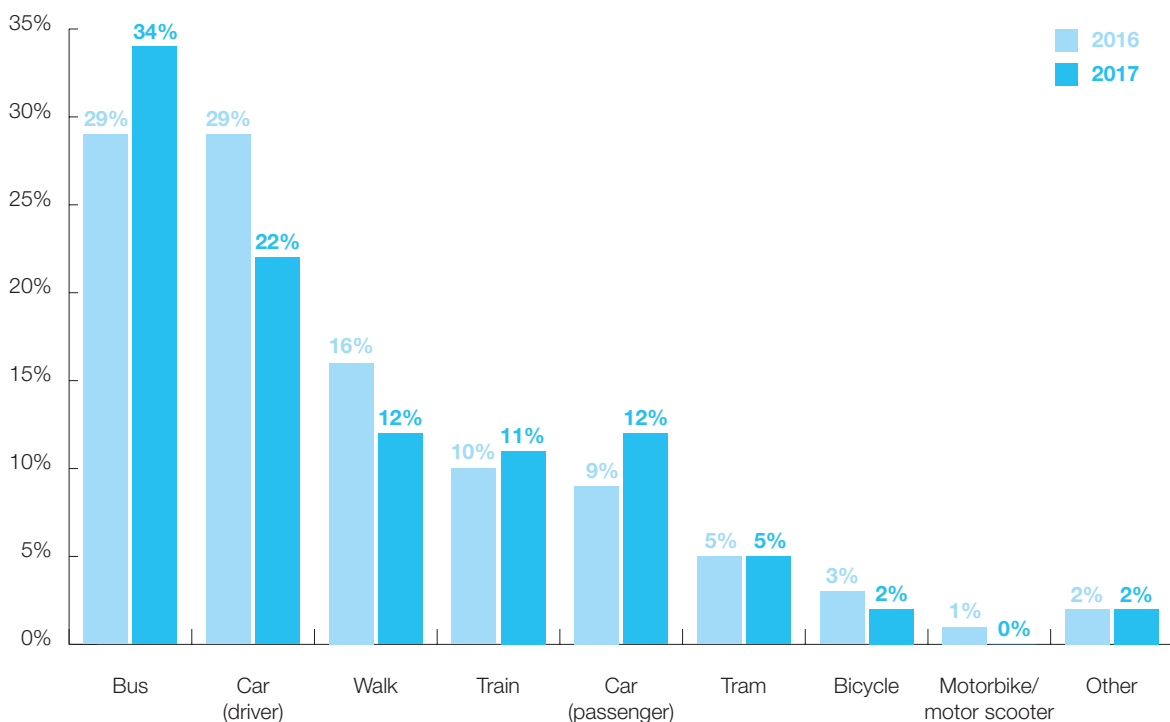
Travelling to the City

Each year, the survey asks City users how they travelled to the City on the day of the survey. It is one of the key behavioural questions that have been tracked over time.

In 2017, the most popular way of travelling to the City was by bus with 34% of City users listing this as one of their modes of transport. The next most popular option was driving (22%) followed by walking (12%) and coming by car as a passenger (12%).

Compared with the previous year, more City users caught the bus to the City and fewer City users drove to the City. This is a continuation of the trend found in past surveys around an increased trend for public transport use and away from private vehicle use. Other modes of transport, such as walking and catching the tram or train, has remained constant over the past two years.

Figure 8. Mode of travel to the City - comparison

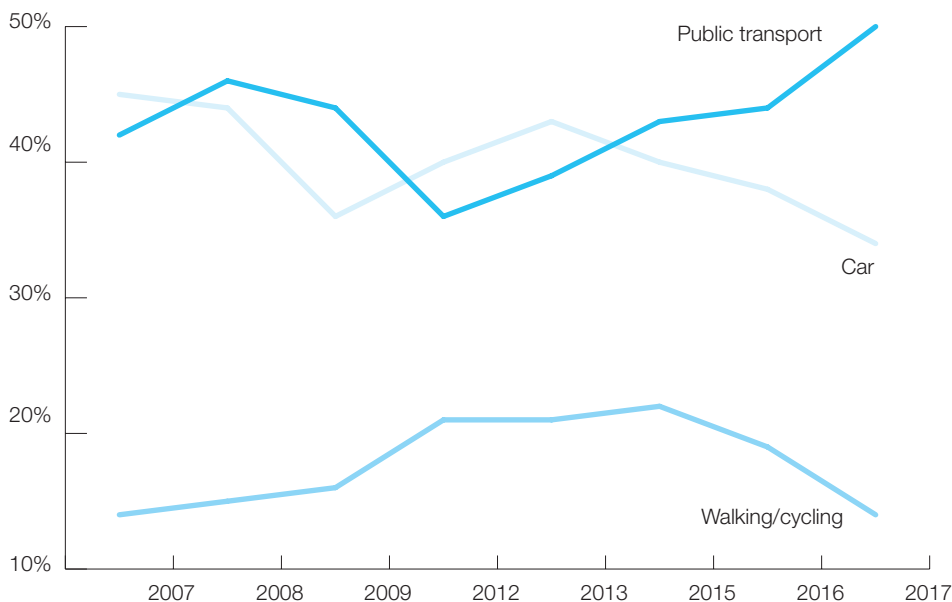


Question: How did you travel to the City today? (multiple responses)

Base: 2017(n=2,005); 2016(n=2,004)

Looking at the trends over the past ten years, there has been a slow but steady increase in the proportion of City users using public transport, which is matched by a decline in the use of private vehicles. The proportion of people who either walk or cycle to the City has seen some variation over time. However, the recent decline is still consistent with historical figures. The variation in the walking/cycling category is likely to be influenced by the number of people that say that they walk to the City as this makes up the majority of this group, with cycling usually accounting for only 2% to 4%.

Figure 9: Mode of travel to the City – trend



Question: How did you travel to the City today? (multiple responses)

Looking at the popularity of various transport modes amongst different user types, the following conclusions can be drawn.

- City students were more likely to catch the bus;
- City visitors and City workers were more likely to be driving in;
- City residents were more likely to be walking as a way of getting around the City;
- Coming to the City by car, either as a driver or a passenger was a more popular option on weekends compared to weekdays; and
- City users who lived by themselves were more likely to be walking.

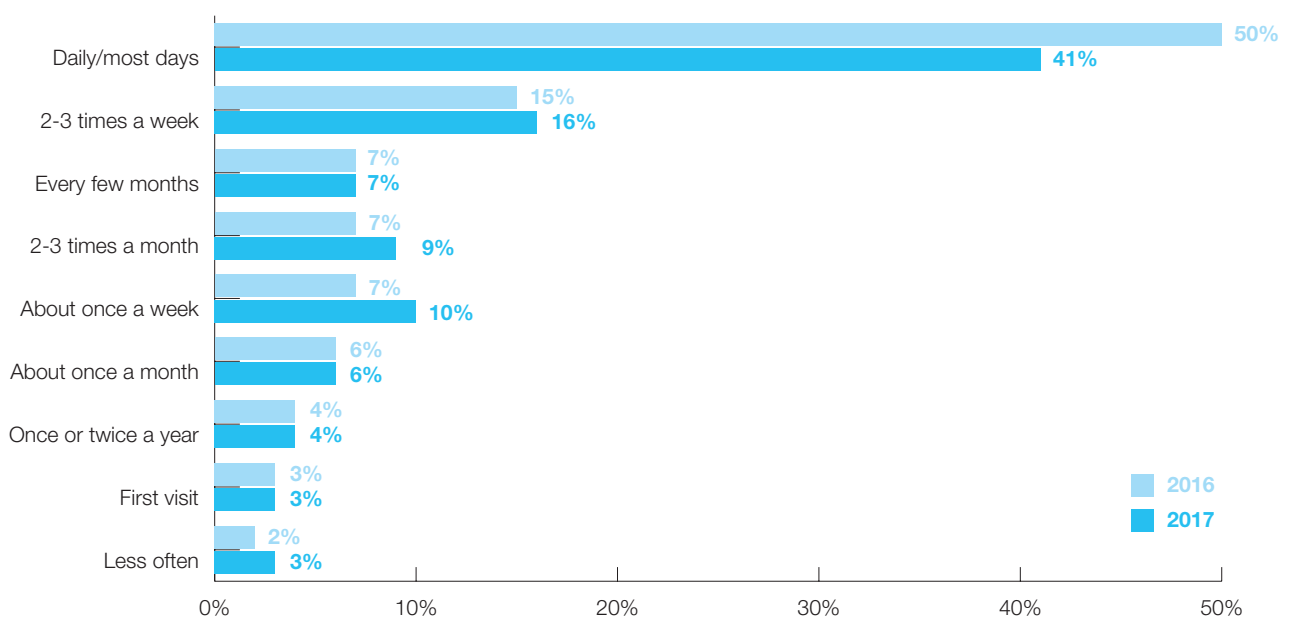


Frequency of visiting the City

The survey also asks how often City users come into the City for any reason, and for specific purposes such as working and studying.

The latest data shows that 41% of City users came into the City daily or most of days of the week. This is lower than the 50% recorded in 2016. The other frequencies of visiting the City have seen little significant change since the last survey.

Figure 10: Overall frequency of visiting the City - comparison

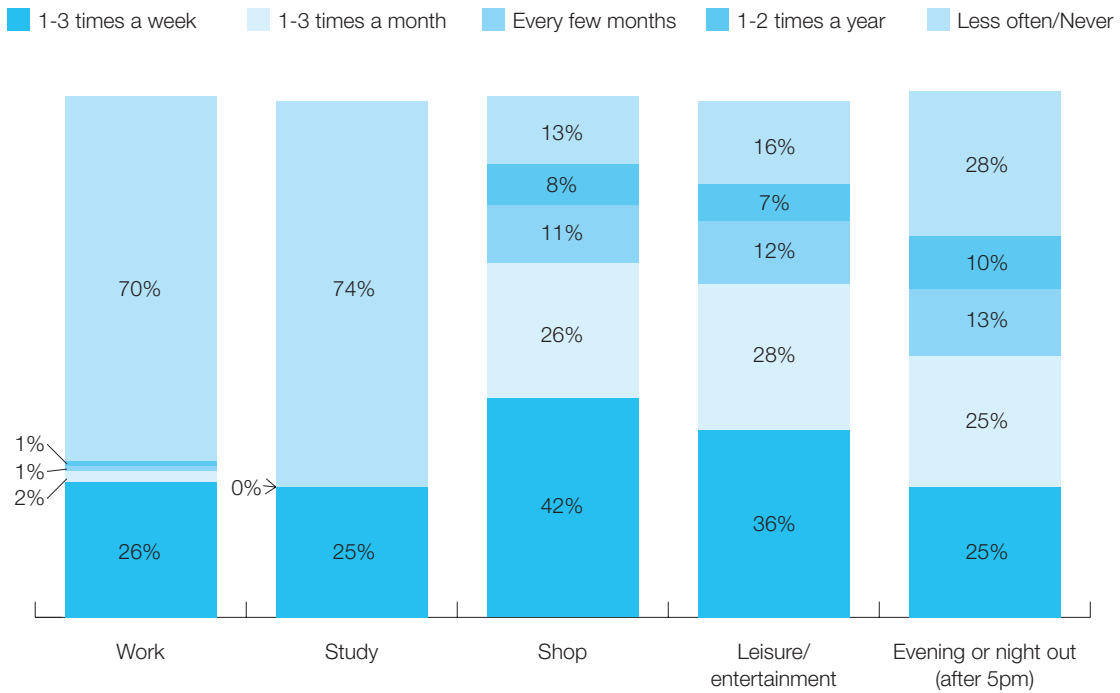


Question: Overall, how often do you come to the City? (single response)

Base: 2017(n=2,005); 2016(n=2,004)

Around two in five City users shopped in the City at least once a week, while a quarter shopped in the City one to three times a month. People coming into the City for leisure or entertainment purposes did so less frequently with only 36% indicating that they came into the City for this purpose on a weekly basis. Only one in four City users said that they came into the City after 5pm on a weekly basis, with 28% of City users indicating that they did not visit the City in the evening at all.

Figure 11: Frequency of visiting the City for specific activities.



Question: How often do you do the following in the City (work, study, shop, leisure or entertainment, have an evening or a night out after 5pm)? (single response)

Base: 2017(n=2,005)



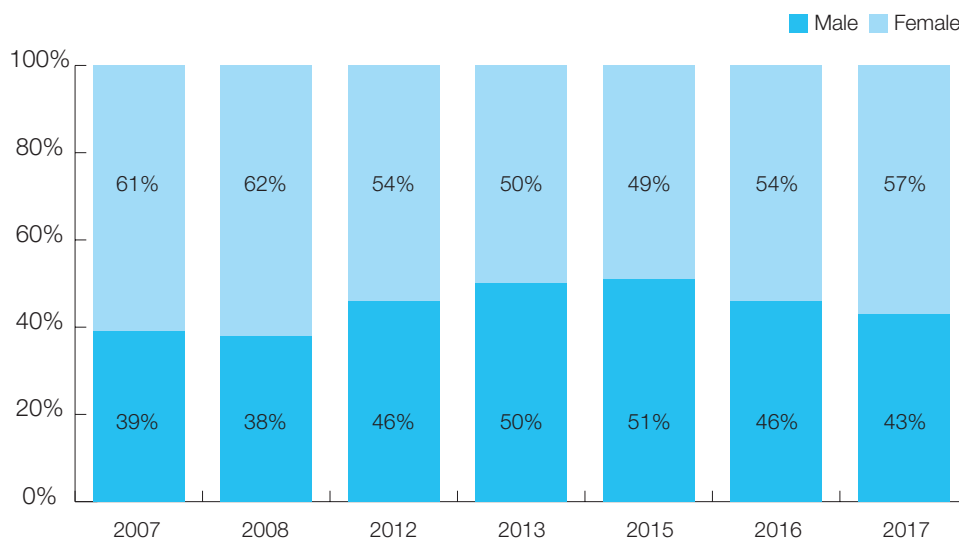
Demographics

One of the key pieces of information collected in the survey is finding out who is here and their characteristics. Throughout the history of the City User Profile Survey, we have collected basic demographic information on City users to track any changes over time.

Gender

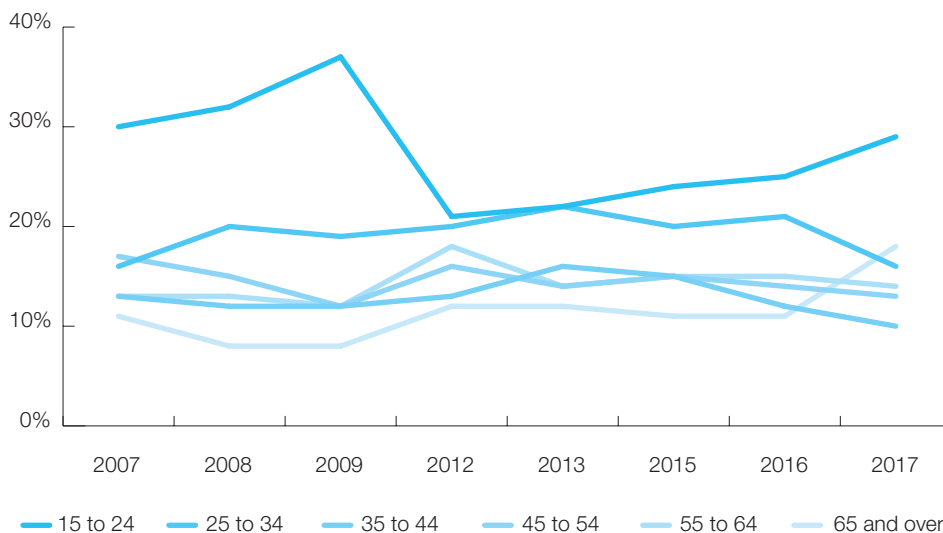
In 2017, there were slightly more females surveyed compared to previous years. However, these figures tend to fluctuate slightly year-on-year as demonstrated below.

Figure 12: Gender - trends



Age

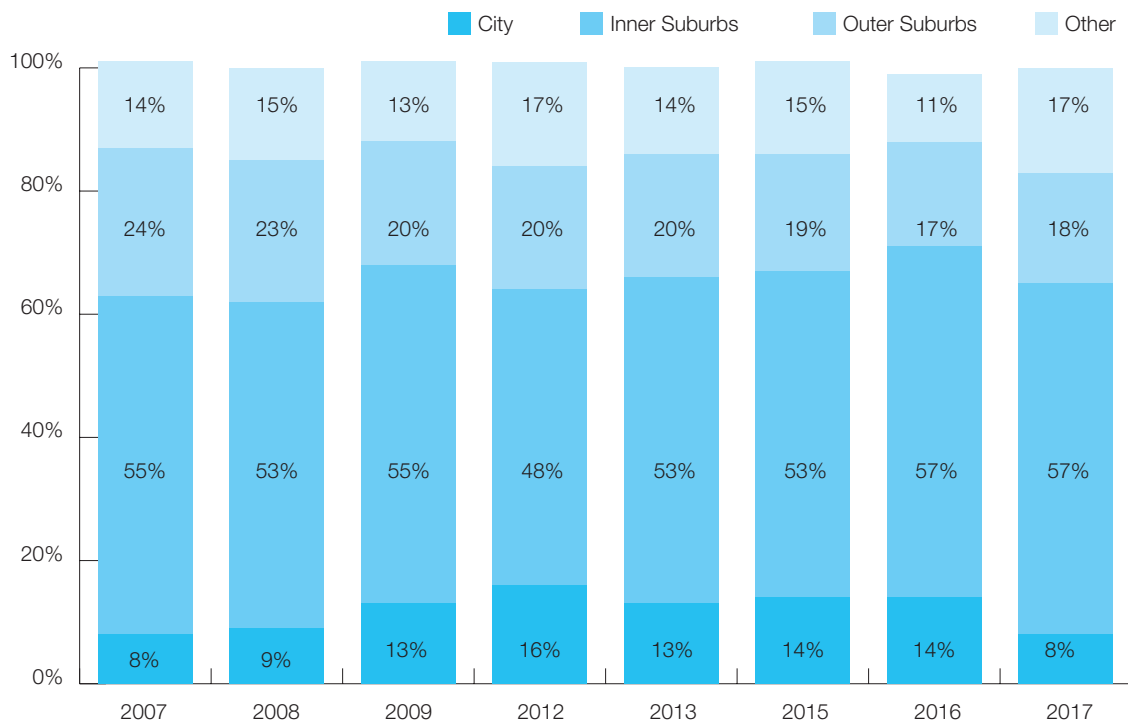
City users continue to be predominantly in the 15 to 24 age group, though there has also been an increase in City users aged 65 and over, which grew from 11% to 18% over the past year. Analysis over time shows that the age composition of City users tends to be consistent with a greater variability in the younger age groups. This is likely to be influenced by the proportion of students as a total of the City user population.



Place of residence

Although City users come from all over the state, country and overseas, most people who come into the City live in the inner suburbs of Adelaide. The composition of where City users live has changed little over the years, although in 2017, there were slightly more people coming from 'other' areas such as regional South Australia, interstate or overseas.

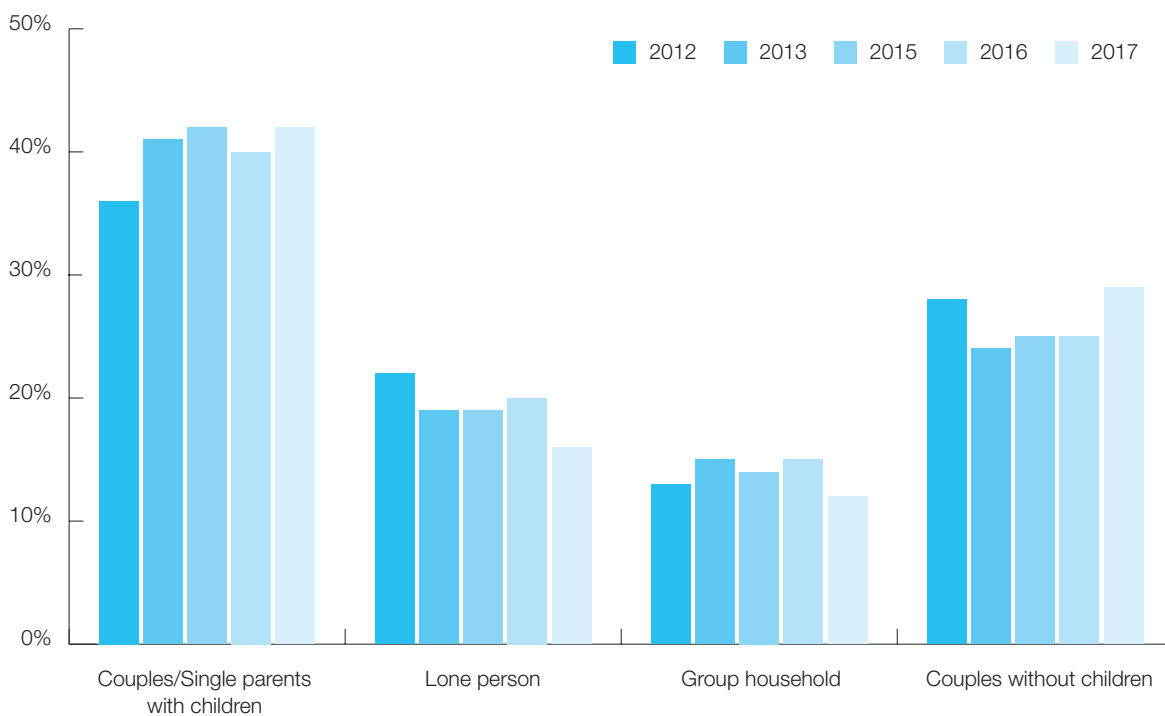
Figure 14: Place of residence - trend



Household type

City users mainly came from a family household with children, which accounted for 42% of the total. The next most popular household type was couples without children, which made up 29% of the total. There was also a slightly higher proportion of lone person households (16%) compared to group households (12%). Although the mix of households types that City users came from in the latest survey is similar to the previous year, the data shows that since 2012, there is evidence of growth in the number of people from households with children and a decline in the number of City users from single person households.

Figure 15: Household type – trend



Compared to the household mix of the Greater Adelaide metropolitan area:

- City users have a similar proportion of couple/single parent households with children (42% versus 40% of metropolitan households);
- More City users came from group households (12% compared to 4% of metropolitan households);
- Fewer City users came from lone person households (16% compared to 26% of metropolitan households); and
- There is a slightly higher proportion of City users who came from households without children (29% compared to 25% of metropolitan households).



What our City users said

A question was included in this year's survey to gain general feedback from City users on what they thought about the City and the council. Just under 800 or 40% of City users surveyed provided comments. City users made comments on a wide range of topics. Below are some of the positive comments that were provided by our City users

"They are doing a good job, the city has come alive in the last 10 years" (*City Visitor, Female*)

"Friendly people and cleanliness is good" (*City Visitor, Male, 70*)

"It is a relaxed quiet city and very liveable" (*City Resident & Student, Male, 29*)

"Thank you for doing a good job" (*City Resident, Male, 56*)

"When I came to Adelaide it was everything I expected which is very beautiful" (*City Resident & Student, Female, 30*)

"It's very beautiful and convenient for international students" (*City Student, Male, 45*)

"I can see the improvements that the council is making with the appearance of the city" (*City Worker, Female, 36*)

"It is nice to see that Adelaide [is] approving the construction of new buildings and not being left behind in advancement improving our image interstate and attracting overseas visitors" (*City Worker, Male, 62*)

"Very beautiful city" (*City Worker, Male, 30*)

There were also several comments that were less positive. These comments centred around themes like the availability and cost of parking, Park Lands, safety, lighting and trading hours.

"[Council] have taken out too many trees in Elder Park and have not provided enough seating. Lighting could be improved in North Adelaide and squares to make it more appealing" (*City Resident, Male, 57*)

"City is beautiful except after weekend events when it is very dirty" (*City Resident, Female, 32*)

"Restaurants and shops are closed by the time I finish uni I would like to see extended trading hours in Adelaide" (*City Student, Male, 28*)

"There should be free parking throughout the city to encourage people to come shop and spend time" (*City Visitor, Male, 48*)

City users also made a few suggestions for improvements that they would like to see around the City. These comments were usually around the themes of having more events and activities in the City, better communicating and promoting the benefits of the City, and better maintenance of the public realm.

"To advertise more to overseas visitors how clean, open landscapes and inviting Adelaide is." (*City Visitor, Male, 17*)

"More public seating areas." (*City Student, Male, 34*)

"The City is beautiful but on weekends there should be more activities like fundraising, live bands and art activities." (*City Visitor, Male, 49*)

"Like to see more cinemas again" (*City Visitor, Female, 84*)

"I would like to see a Big W here in Adelaide" (*City Resident, Female, 34*)

"Public pianos would be great" (*City Worker, Male, 47*)



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