CITY USER PROFILE

2021 EXECUTIVE SUMMARY

CITY OF ADELAIDE

City of Adelaide

2021 City User Profile

Executive Summary

August 2021

CONTENTS

KEY FINDINGS

4 WEEKS

Survey undertaken between 16 April and 18 May 2021
by McGregor Tan Research on behalf of the City of Adelaide

2000
surveys completed

we heard from

993 visitors

531 workers

404 students

247 residents

Key Topics covered included…

spending

travel

safety

mainstreets ← Melbourne Street, O'Connell Street, Hindley Street and Hutt Street

The City User Profile (CUP) Survey was undertaken between 16 April and 18 May 2021 by McGregor Tan Research on behalf of the City of Adelaide. The survey achieved a target of 2,000 responses, including boosted samples in four of the City's main streets.

Key findings of the 2020 CUP Survey are given below.

More detail and comparisons by demographics, or previous years, is found in the subsequent sections.

Reasons for being in the City

Working was the main reason for visiting the city. 20% of respondents were in the City for work on the day of survey.

While a quarter (25%) mentioned they had been to or would go to a café, have a coffee or shop in addition to their main reason for being in the City, 30% indicated they did not intend to do anything else whilst in the City.

Shopping in the city at least once a year was identified as the main reason for visiting the city at any time, followed by visiting for leisure and entertainment.

Overall, two thirds of city users visit the city at least once a week, with the majority visiting daily or most days.

More events, cheaper or free parking, shopping and entertainment would inspire visitation to the city more often.

Travel, timing and spend

Car (as driver or passenger) and bus were the main means of travelling to the city used by 36% and 29% respectively

Most users arrived between 8am and 12pm and expected to leave between 1pm and 5pm.

On average, respondents spent or intended to spend $75 in the city on the day of survey.

Mainstreets

Those interviewed in main streets were mainly just passing through.

Cafes, restaurants, and food is what city users like most about the mainstreets. More or different restaurants, cafes, shops and cheaper or free parking are the things that might encourage more visits to main streets.

Safety

Most knew where to go for help if they felt unsafe in the City.

Nine in ten agreed that the City has public spaces that I feel safe to use.

Services

High level of agreement that Adelaide is a welcoming and dynamic city full of rich and diverse experiences.

Overall, respondents were moderately satisfied with services delivered by Council.

ABOUT THIS SURVEY

Purpose

The City User Profile (CUP) Survey is the City of Adelaide's primary means to understand how the City is used, who by, and how often.

The City User Profile (CUP) Survey is a long-running study conducted by the City of Adelaide to better understand the behaviour of people who visit the City. It has been undertaken once every one to two years since the early 2000s and conducted annually since 2015, except for 2020 when it was cancelled because of COVID-19.

The aim of the CUP Survey is to better understand who visits the City, why they visit, how often they visit and their perceptions of the City. This information is used to inform program and service delivery so that we can better meet the needs of our city users. In addition to these core questions, the CUP includes questions that relate to specific programs or activities or that track measures of success in the Strategic Plan. Specific program questions included this year related to safety, physical activity, satisfaction with council services, and mainstreets.

Key changes to the 2021 CUP Survey compared to the 2019 survey are:

- A focus on main streets with additional questions asked only of people surveyed on Hindley Street, Hutt Street, Melbourne Street and O'Connell Street
- New questions to help track some measures of success in the 2020-2024 Strategic Plan
- Feelings of safety at various times. These questions are usually included in every second CUP Survey and were last asked in 2018.

Throughout the report you will see references to 'city user type'. Based on answers to question 5 of the survey, respondents to the CUP are classified as 'residents', 'workers', 'students' or 'visitors'.

City user types - definitions

City user	anyone who was in the City during the surveying period
City resident	city users who live in the suburbs of Adelaide and North Adelaide
City worker	city users who work in the City at any time, not just on the day of the interview
City student	city users who study at a city campus (secondary and tertiary) at any time, not just on the day of the interview
City visitor	city users who come into the City for reasons other than work or study and do not live in the City

Note: With the exception of city visitors, a city user may identify with more than one city user type e.g. be a city resident and a city student.

Method

Data was collected in-person from city users in high pedestrian areas including the Park Lands, day and evening, weekdays and weekends between Friday 16 April and Tuesday 18 May 2021.

2,000 people were interviewed overall. This included a quota of at least 60 respondents in each of the four priority mainstreets.

The map below shows where the surveys took place over the survey period.

Demographic data

52% female

47.5% male

0.5% non-binary

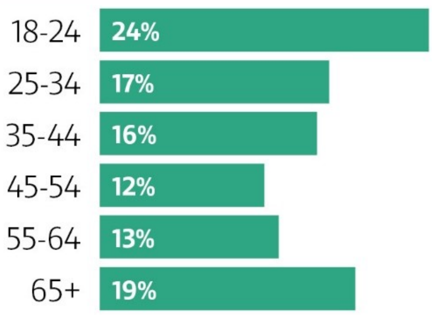
46% visitors

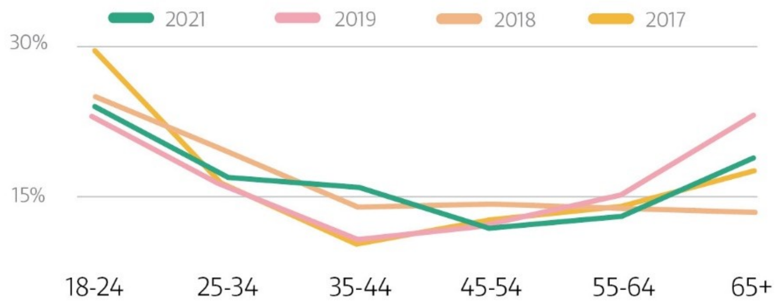
24% workers

19% students

11% residents

AGE





INCOME

Under $50,000	20%
$50,000 - $100,000	18%
$100,000 - $150,000	11%
Over $150,000	12%
NO ANSWER	39%

OCCUPATION

student (full time or part time)	24%
senior managerial/professional	23%
pensioner / self-funded retiree	18%
tradeperson / blue collar	13%
clerical/white collar	12%
unemployed and looking for work	5%
home duties	3%
prefer not to answer	4%

HOUSEHOLD TYPE

lone person	22%
couple/single parent with adult children	19%
older couple, no children at home	17%
group household	14%
young couple, no children	10%
couple/single parent with teenage children	8%
couple/single parent with young children	7%
prefer not to answer	3%

FROM

AUSTRALIA

UK NEW ZEALAND

CHINA HONG KONG SINGAPORE

MALAYSIA INDIA SOUTH KOREA

NOTES Not all answers are shown and rounding of data / summaries may result in totals being more/less than 100%.

Structure

This report is arranged by broad topic area as follows:

- Reasons for being in the City (questions 1, 2, 5, and 7 to 10)
- Travel, timing and spend (questions 3, 4 and 6)
- Main streets (questions MS1 to MS5)
- Safety (questions 11 to 13)
- Services (question 14)

In all cases the results are presented for the sample population.

In some cases, the results are also presented by a key demographic, such as age or gender.

If a question was asked in a previous CUP Survey, the 2021 results may have been compared to that year.

The content of this report does not represent all the analysis that can be done on the 2021 CUP Survey: it is a summary to provide staff and Council with key insights from which further requests can be actioned.

REASONS FOR **BEING IN THE CITY**

Growing city visitation is a key priority for the City of Adelaide. We know that ‘getting people back to the City’ is what city businesses would most like Council to do. Knowing who comes to the City of Adelaide, what for and how often is the core purpose of the CUP Survey. Knowing what would inspire additional visits is fundamental to COVID-19 recovery, city growth and Mainstreets Revitalisation programs.

Visiting the City

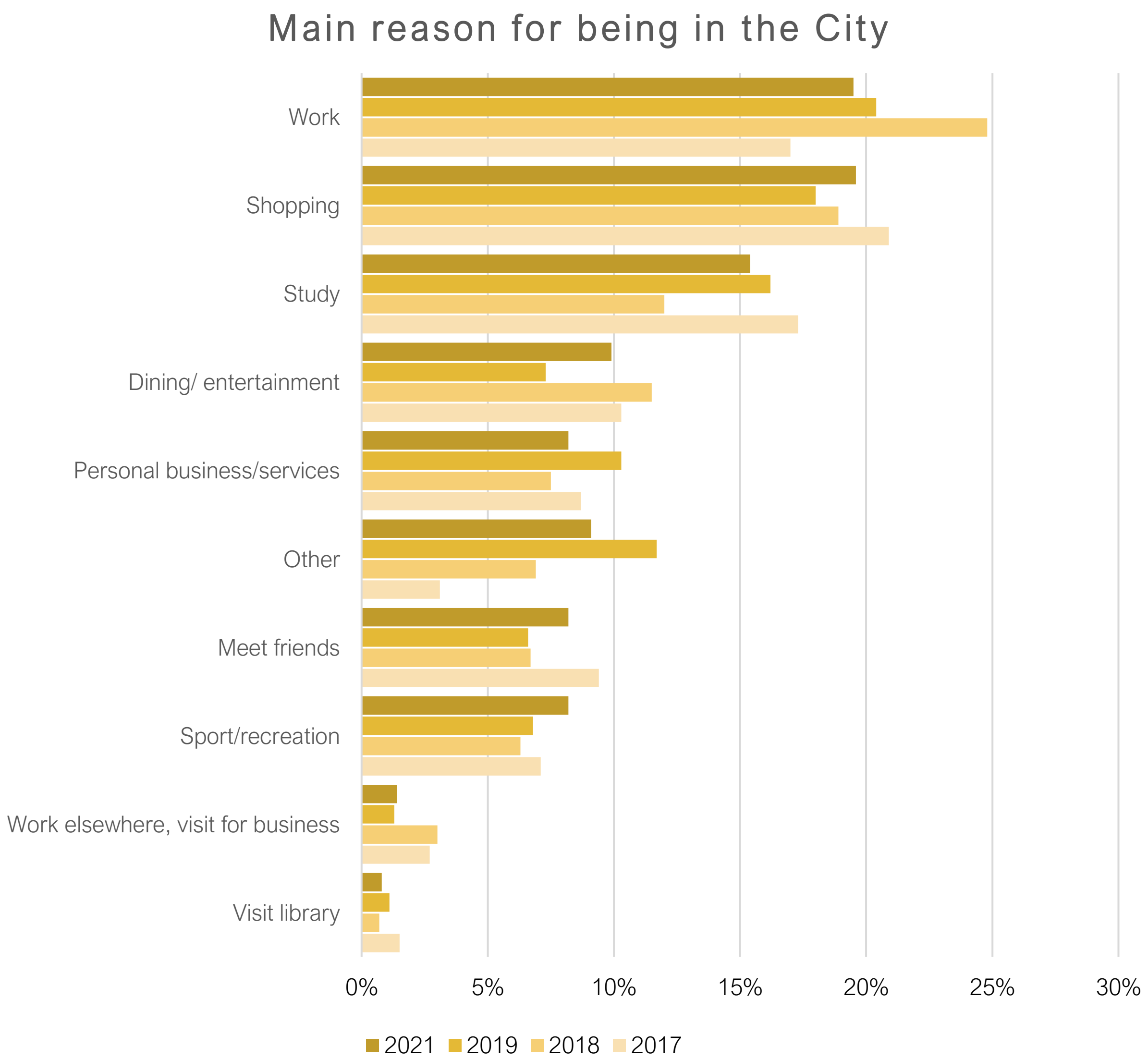
Q1: What is the main reason you are in the City today?

One of the core questions in the CUP Survey is about the main reason for visiting the City on the day of the interview. As shown in the graph below, the main reasons for coming into the City - to work, shop, or study - have been unchanged over time.

Although the number of city users coming into the City mainly for work decreased compared to 2018, the 2021 results were like the 2019 results. This suggests that the share of workers as part of the broader city user population has not changed, or has returned to close to pre-pandemic levels.

The proportion of city users who are in the City mainly for study has been up and down since 2017, although there was no significant change between 2019 and 2021.

10% of city users had dining/entertainment as their main reason for being in the City on the day of interview. This is up on the 7% recorded in CUP 2019, but lower than the high of 12% in 2018.



Visiting the City

Q2: What else, if anything, have you done, or will you do, while you're here?

This question seeks to understand 'secondary activity' by city users. From it we can see which city user types are more of less likely to do something other than their main activity while in the City. This is useful for marketing and communications about the city offer and efforts to increase length of stay and spend in the City.

According to the CUP 2021 results, 30% of city users said that they were not planning to do anything other than their main activity while in the City. This is like the 2019 findings.

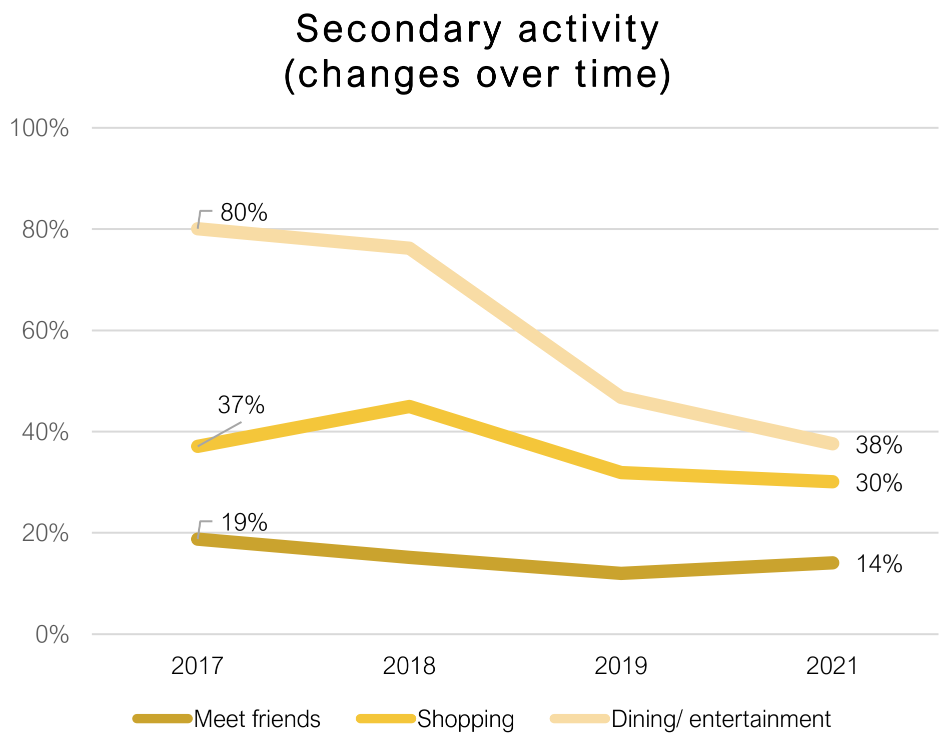
Dining and entertainment remains the most popular secondary activity, however, the share of city users who reported undertaking this activity has fallen significantly over the past few years.

In 2017, 80% of city users said they would do a dining or entertainment activity in addition to their main activity. By 2021, the share of city users who nominated dining/entertainment as their secondary activity had fallen to less than 40%.

Part of this decline could be attributed to the restrictions on public activities because of COVID-19 however, as this trend was already evident in 2019, other factors are likely to be in play too.

The next most popular secondary activities were shopping and meeting friends. Although the popularity of these as secondary activities has also declined over the past few years, it has not been to the same extent as dining and entertainment.

New questions to CUP in 2021 about mainstreets reveal that eateries are an often-cited missing element of main streets or something that could be improved. These perceptions could be a contributing factor to the decline in dining and entertainment as a secondary activity. It could also be other factors such as reduced disposable income or relative lack of opportunity or inclination for non-essential activity in the (post)-COVID environment. *See the separate section in this report on Mainstreets for further analysis*



Other reasons given for visiting the City included:

For **sports and recreation** – 8% as the primary reason and 7% as the secondary reason

Personal business / services – 8% as the primary reason and 4% as a secondary reason

Visiting a **library** – 1% as the primary reason and 2% as the secondary reason

Visiting the City

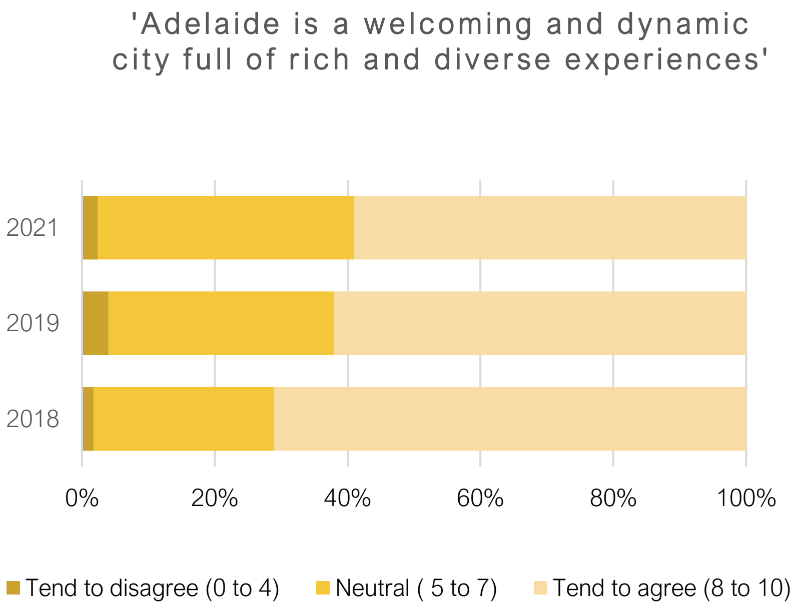
Q5: Why do you visit the City (at any time, not just today)?

This question completes the picture of use of the City for each respondent.

27% work in the City. 21% are a student at a city secondary or tertiary institution. Attending a specialist appointment is a reason for coming to the City for nearly one in five people, and close to half (49%) visit the City for leisure or entertainment at least once a year. 22% visit the Park Lands at least once a year.

Q10: Using a scale of 0 to 10 where 0 is strongly disagree and 10 is strongly agree and thinking about the City, how strongly do you agree or disagree that Adelaide is a welcoming and dynamic city full of rich and diverse experiences?

This question has been included in the CUP Survey since 2018 to better understand the extent to which how the City of Adelaide would like the City to be viewed by users reflects actual user perceptions. It is a component of the [Dynamic City: Arts and Culture Dashboard](). The proportion of city users who tend to agree with this statement (provided a score of 8 of higher) has steadily declined over time. We can see that the share of city users who tend to disagree with this statement has not seen much change but there is a trend to a greater share of respondents who feel neutral about this statement.



Frequency of visitation

Q7: Overall, how often do you come to the City?

This question is to gauge how often city users come to the City for any reason.
Frequency of visiting the City by is largely unchanged from 2019 to 2021. There is a slight increase in the proportion now visiting the City 2-3 times per week (19.6% up from 17%) and a slight decrease in the proportion visiting about once per week (8.3% down from 11%).

	2021	2019
Daily/most days	41%	41%
2- 3 times a week	19.6%	17%
About once a week	8.3%	11%
2-3 times a month	7.4%	8%
About once a month	7.3%	7%
Every few months	4.7%	5%
Once or twice a year	3.7%	4%
Less often	5.4%	2%
First visit	2.8%	3%

Q8: How often do you do the following in the City?

66% of the respondents classified as city workers work in the city daily/most days. A further 20% of workers work in the City 2-3 times per week. Interestingly this is the same proportions as found through the CUP Survey in 2019, indicating that these are work patterns existing before the workplace disruptions of COVID-19.

18% of city users shop in the City about once per week with a further 28% shopping in the City 1-3 times per month.

15% of all city users use the City for leisure or entertainment about once a week and a further 29% do so 1-3 times per month. This is slightly down on 2019 where 18% used the City for leisure or entertainment about once a week and a further 31% did so 1-3 times per month.

The propensity to have an evening or night out in the City has changed little except that the proportion of city users that never have an evening or night out in the City has fallen. It is down from 26% in 2019 to 19% in 2021. 15% have a night out in the City about once a week and a further 27% about once a month. This is largely unchanged from 2019 (14% and 26% respectively).

In 2021 more city users were participating in sports and recreation activities in the City. In 2021, 59% of city users said they never participated down from 79% in 2019. City users were also participating in sport and recreation activities more frequently. Those who participated once a week grew from 11% to 17% between 2019 and 2021 while those who participated a few times a month rose from 6% to 10%. As this was the second year of data collection, it is too early to establish a trend.

Activities asked about at this question included:

Work

Study

Shop

Leisure or entertainment

Have an evening out after 5pm

Participate in a sport or recreation activity

Frequency of visitation

Q9: Since COVID-19 fewer people have been coming into the City. What would inspire you to visit the City more often?

This question was a new inclusion for 2021 to build our understanding of what could drive more frequent visitation from existing city users.

Many respondents said there was nothing that would bring them into the City more often. Many others said they were ‘unsure’ or ‘did not know’ what would inspire them to come into the City more often. Some respondents appeared to mistake the question as a reiteration of why they come to the City and a few appear to have focused on the lead-in to the question (about COVID and number of people) with comments along the lines that they had not observed much change.

From the specific comments received we can see that:

- Living a distance from the City inhibits more city visits
- Calls for more/cheaper or free parking is still a prominent issue
- Accessing the City by public transport is an issue for those coming from further away (Gawler, Mt Barker, Para Hills as examples)

COVID-19 has affected the behaviours of some city users. The easing of COVID restrictions so that more things are open and events are not cancelled was mentioned and a number noted that getting more people vaccinated would encourage more visits.

The need for ‘more shops’ was often cited by respondents. This included calls for high end retail, ‘new’ or ‘different’ shops, variety of stores and longer opening hours. In some cases, the longer opening hours comment was made regarding cafes/restaurants.

There was a significant call for more events in the City, including “festival” type events as well as theatre, concerts, live music and community events.

The call for more events may seem at odds with what we heard from the people interviewed on the mainstreets (see below). For mainstreet users, events were not generally something that would increase visitation to that street.

SPEND,
TRAVEL AND TIMING

Understanding how city users access the City has several applications, including as an input to the Community Carbon Inventory and as a gauge of how travel modes shift over time and which city user types are inclined to use which mode of travel to access the City.

City visitation and economic health are tied, so understanding the level of spend helps to show the strength of that relationship.

Spend

Q3: In total, how much have you spent, or will you spend, in the City today?

Average anticipated spend on the day of survey was $75 with a median spend of $30. While an average spend of $75 is $10 more than the average spend in 2019, half of city users will spend no more than $25 while in the City.

Anticipated spend ranged from nothing (13% of respondents) to $5,000. 36% of respondents would spend up to $25 (unchanged from 2019). A further 22% would spend between $26 and $50, 16% between $51 and $100 and 14% over $101.

$75

average spend

up from $65 in 2019

Time of arrival and departure

Q6A: Approximately what time did you arrive in the City today?

Q6B: and what time do you expect to leave the City?

These questions were asked of respondents who do not live in the City.

Included for the first time in CUP 2019, arrival and departure times is about understanding the peaks and troughs of city use.

Most city users arrived between 8am and 12pm (69% of arrivals) and expected to leave between 1pm and 5pm. Arrivals peaked at 10am (22%) and expected departures at 3pm (16%). These findings are identical to those in 2019.

There is no significant difference between arrival times on weekdays and weekends although 3pm and 4pm are the most popular times to depart the City on weekends.

→10am

peak arrival

22% of responses

←3pm

peak departure

16% of responses

Travel mode

<u>Q4: How did you travel to the City today?</u>

Compared to 2019, there has been a marked decrease in the number of city users who are travelling to the City via public transport. The greatest decline in public transport usage between 2019 and 2021 was by train, which fell from 17% in 2019 to 7% in 2021. This is the lowest rate of train usage since 2013 and could be attributed to the impacts of COVID-19 as well as the closure of the Gawler railway line for electrification.

Although the share of city users traveling by car has increased since the 2019 CUP Survey, it is consistent with the levels of car usage recorded in earlier surveys. This suggests that rather than substituting public transport for car use, some city users are opting to walk or cycle instead. This could explain the growth in walking and cycling as ways of travelling to the city.

Similar to previous years, city workers and city visitors were more likely to drive while city residents were more likely to walk. City students were more inclined to use public transport to travel to the City.

The proportions shown do not add to 100% as a person could use more than one mode of travel.

<u>This question was multiple choice with people able to chose more than one option as their travel mode into the City, including:</u>

Tram

Train

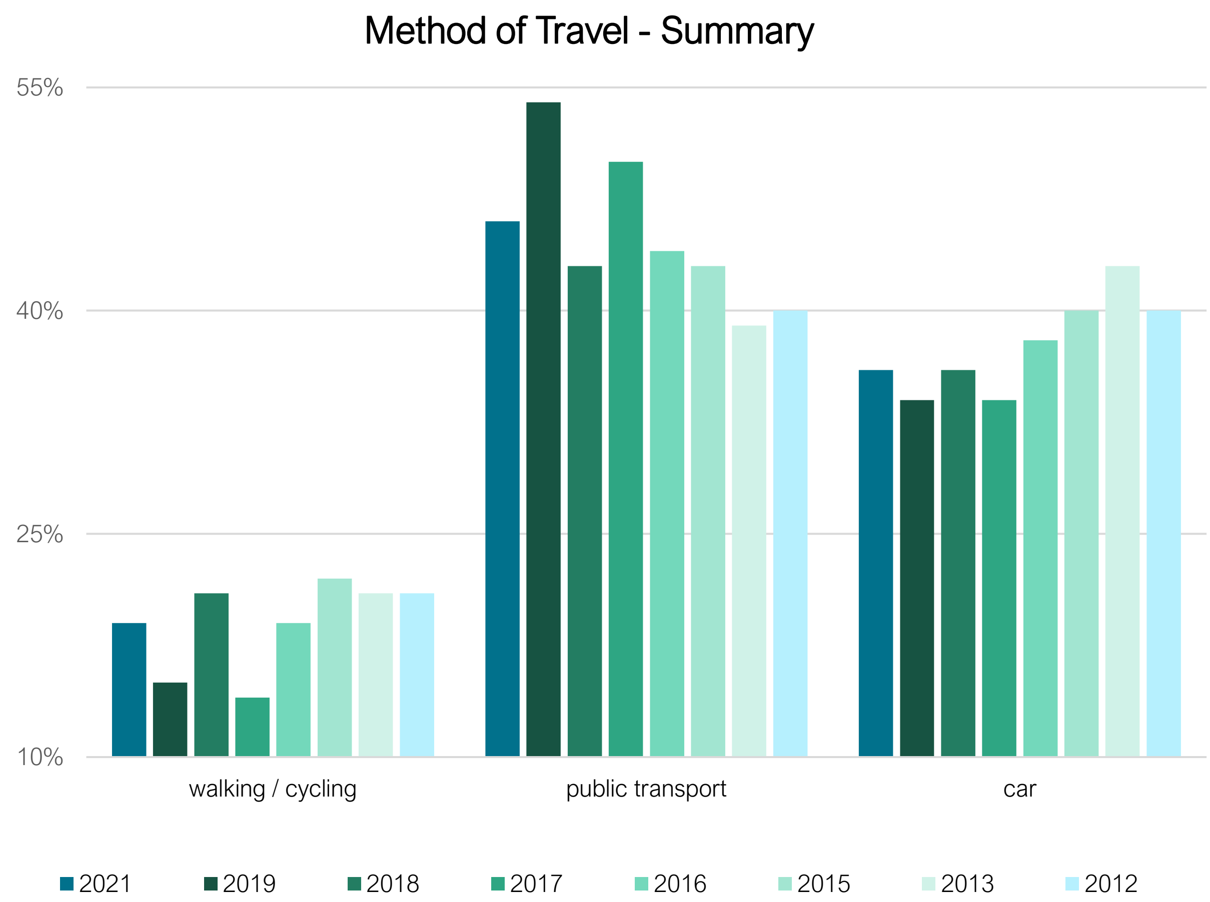
Bus

Car- driver

Car – as passenger

Walking

Cycling



HINDLEY | HUTT | MELBOURNE | O’CONNELL

MAINSTREETS

Mainstreets continue to be a focus for the City of Adelaide with Mainstreet Revitalisation programs ongoing in 2021-2022. The establishment of the Adelaide Economic Development Agency (AEDA) and a mainstreets coordination approach is also part of the mainstreets focus. In 2021 the CUP Survey included additional questions for people interviewed on four mainstreets.

Unless otherwise stated, the numbers (n) of people who completed survey questions in each main street are: Hindley Street (n=79), Hutt Street (n=60), Melbourne Street (n=60), O’Connell Street (n=60).

Spotlight on...

Hindley Street

One of the most liked things about Hindley Street is its proximity to other places (chiefly Rundle Mall).

Most Hindley Street users identified themselves as workers or students. Many are “passing through” on the way to elsewhere. This includes students passing through Hindley Street on the way to their places of education.

Safety and cleanliness continue to need addressing even though the ‘grittiness’ is core to the atmosphere of the street.

What do you <u>like most</u> about Hindley Street?

What would encourage you to visit Hindley Street more often?

In your view, what is missing from Hindley Street?

Motivation and frequency

QMS1: What is your main reason for being on (mainstreet) today?

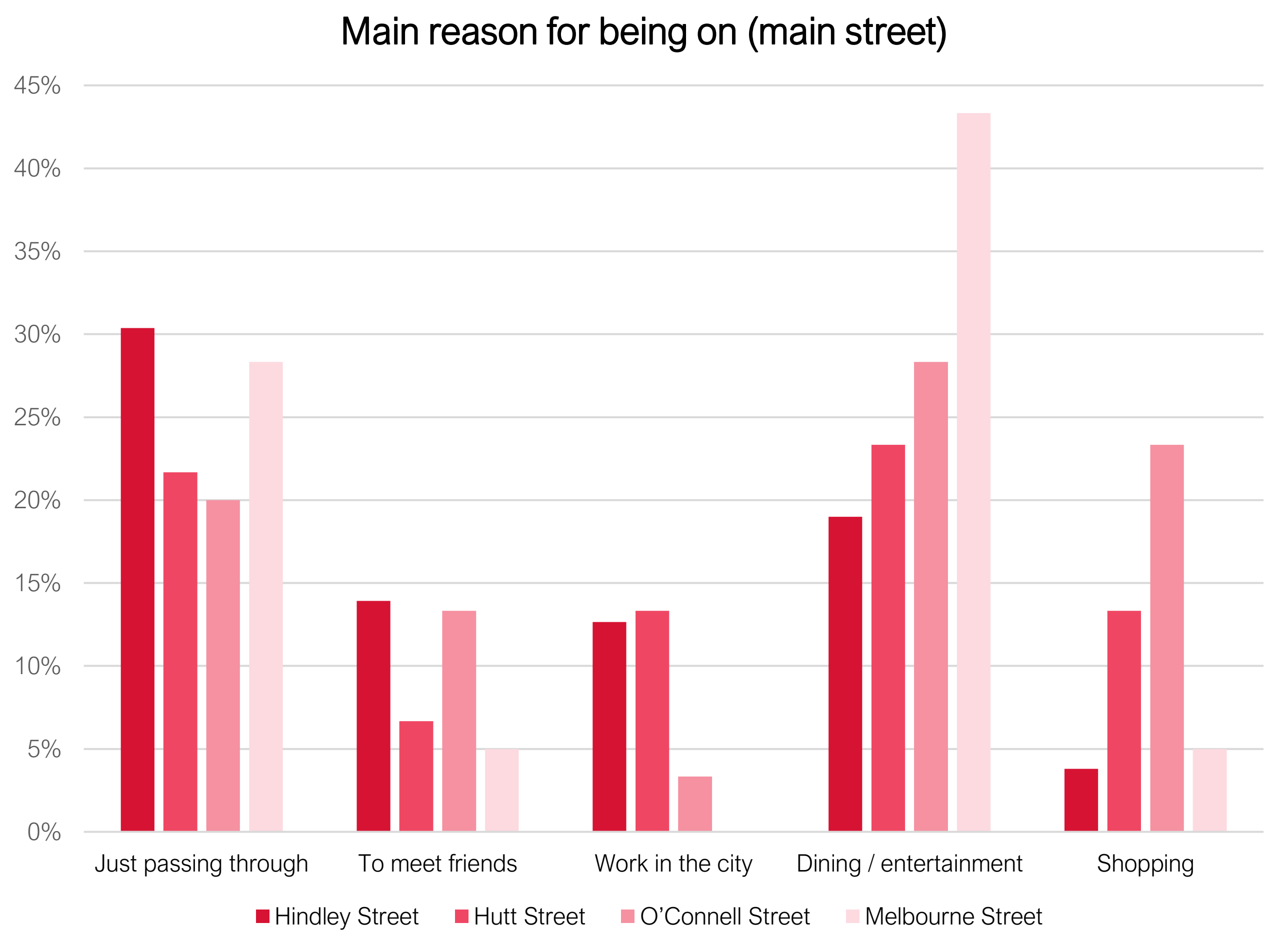
Persons interviewed on selected mainstreets were each asked their main reason for being there.

The 2021 CUP boosted the sample of survey respondents in these main streets to achieve at least 60 responses in each one. This was necessary to yield workable data and because the number of responses to CUP on mainstreets (other than Hindley) is typically low.

'Just passing through' was a common reason given for being on the mainstreet. Dining and entertainment as a reason had a presence on each main street although significantly more so on Melbourne Street than elsewhere.

The results clearly show the strengths or attraction of mainstreets for particular purposes.

For example, 17% of people on Hutt Street were there for personal services and 11% of those on Hindley Street were there to attend an educational institution. The last is interesting given that 42% of interviewees on Hindley Street were classified as 'students'. This indicates that students use Hindley Street for reasons beyond attending education or that being a student and being on Hindley Street does not mean the student attends an education institution on Hindley Street. It may also account for a greater proportion of spend on Hindley Street being in the $1-$25 range (45%) than average spend in that range in the city overall (36%).



Spotlight on…

Hutt Street

Hutt Street gets a big tick from users for its general atmosphere. This is supported further by Hutt Street users nominating aspects of the streetscape as the most liked thing about Hutt Street.

Eateries are also a stand-out ‘most liked’ aspect.

Nothing missing? Maybe a bit of retail and other services. Hutt Street shop fronts are characterised by many in the Health Care and Social Assistance and Accommodation and Food Services industries with relatively few other services and retail businesses.

Many of the people interviewed on Hutt Street were residents or workers both of whom are likely to value having services as part of the mix.

What do you like most about Hutt Street?

What would encourage you to visit Hutt Street more often?

retail / services
public facilities
parking
atmosphere
promotion
nothing
streetscape
low speed limit
activities
public transport
eateries / bars

In your view, what is missing from Hutt Street?

retail / services
streetscape
public facilities
eateries / bars
parking
nothing
people
activities / music
variety
services
bike parking

Motivation and frequency

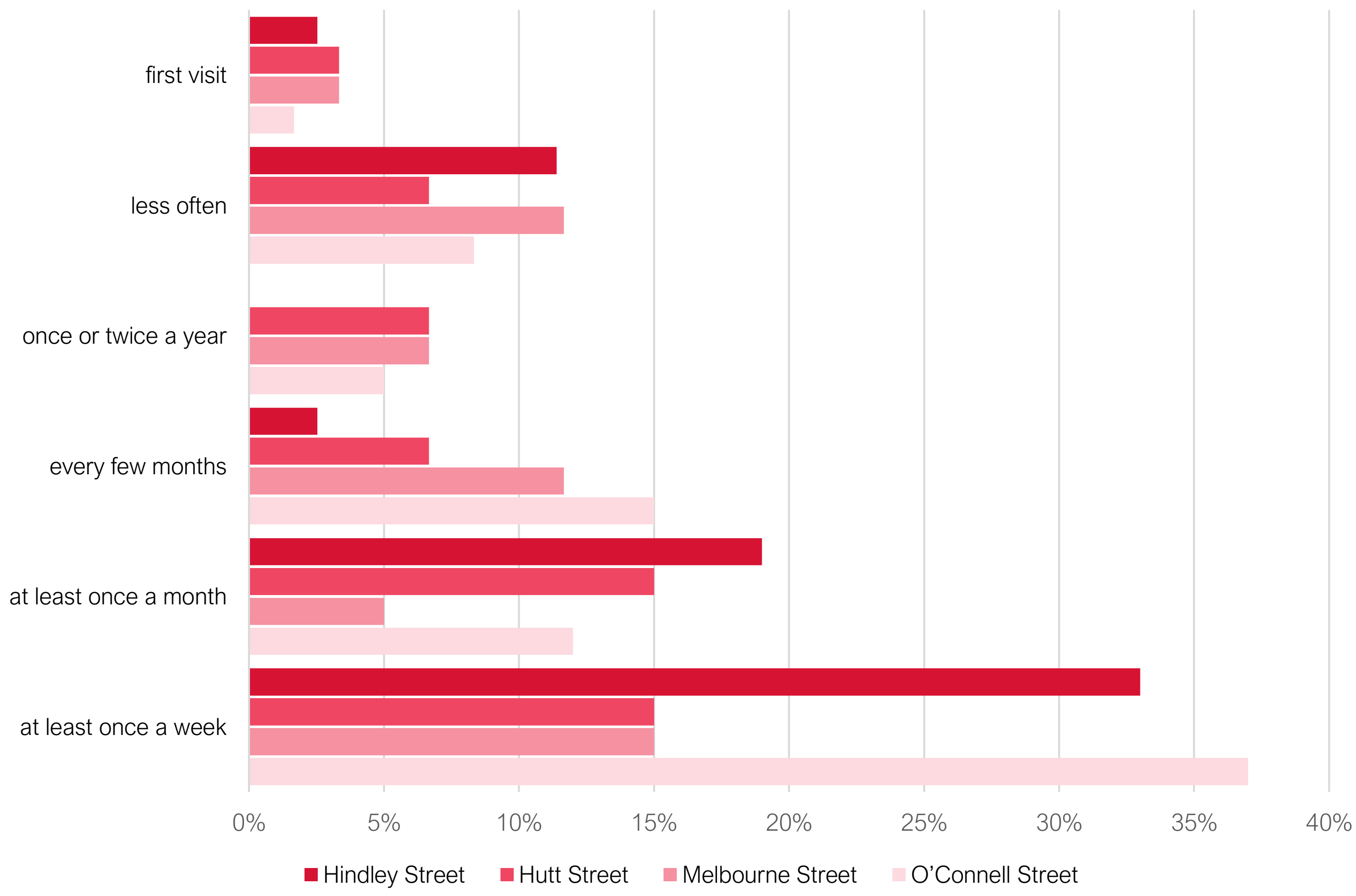
QMS2: Overall, how often do you visit (main street)?

Those interviewed in Hindley, Hutt and Melbourne Streets visited daily or most days, while those visiting O'Connell Street were more likely to visit about once per week.

"I visit daily or on most days"

32%	47%	47%	22%
Hindley	Hutt	Melbourne	O'Connell

Visitation frequency



Spotlight on...

Melbourne Street

The business mix on Melbourne Street shows a street dominated by health and other types of services. More than half of the street level businesses on Melbourne Street are of that type.

While the eateries of Melbourne Street are well liked by users, more and different ones would make the street even better.

Retail was most often mentioned as what was missing from Melbourne Street. This may be related to many of the people interviewed on Melbourne Street identifying as visitors. It indicates that the Street needs to offer a more complete package to users.

What do you <u>like most</u> about Melbourne Street?

What would encourage you to visit Melbourne Street more often?

parking
atmosphere
experiences
retail
work
eateries
free tickets
opening times
transport / less traffic
nothing

In your view, what is missing from Melbourne Street?

eateries
activities
sports
atmosphere
bars
retail
public facilities
streetscape
outdoor dining
parking
nothing
foot traffic

Features and Improvements

<u>QMS3: What would encourage you to visit (main street) more often?</u>

<u>QMS4: What do you like most about (main street)?</u>

<u>QMS5: In your view, what is missing from (main street)?</u>

Users might visit O'Connell St more if the retail offer was better. Retail and the variety of retail stores on O'Connell Street was most often cited by users as what is missing from O'Connell Street. Accommodation and food services is the very dominant street level business type on O'Connell Street. Curation of the offer might diversify this mix and increase the overall appeal of the street.

Eateries, the atmosphere, and the streetscape are the most liked aspects of O'Connell Street. The same is true for Hutt Street. Hutt Street users also nominated various aspects of the streetscape as the most liked elements of the street. Eateries and atmosphere also top the list for Melbourne Street users.

For Hindley Street users eateries are high on the list of most liked things about the street, although the top thing is the proximity of Hindley Street to other places!

While the eateries on Melbourne Street are well liked, more/different ones would make the street even better – so it's the dining rather than the shopping that matters most to users of Melbourne Street. That is reflected in eateries as the key driver for extra visitation. That being said, retail was most often mentioned as what was missing from Melbourne Street. This indicates that the Street needs to offer a more "complete package" to users. Addressing parking would please users too.

Interestingly, city users interviewed on Hutt Street predominantly responded that there was nothing missing from Hutt Street and that there was nothing that would encourage them to visit the street more often.

Eateries was the top missing feature of Hindley Street for its users, followed by cleanliness and safety. Users made it clear that addressing cleanliness and continuing to address safety would encourage more visits.

Events and activities were well down the list of things missing and things that would encourage additional visits for all four main streets.

Spotlight on…

O'Connell Street

O'Connell Street eateries and its general atmosphere are the most liked aspects according to users.

Retail, in particular a variety of retail, is the key 'missing' element for O'Connell Street that would encourage users to go there more often.

Unlike the other main streets, activities may encourage more frequent visitation with markets and music being specific suggestions.

What do you <u>like most</u> about O'Connell Street?

What would encourage you to visit O’Connell Street more often?

In your view, what is missing from O’Connell Street?

SAFETY

Feeling safe in the City is important as feeling unsafe or a perception that the City is unsafe may deter visitation. Questions about safety at different times of the day and night are included in the CUP Survey every second year. As the CUP Survey did not take place is 2020 due to COVID-19, the safety questions were last asked in 2018.

Safe in the City

<u>Q11: In general, how safe or unsafe do you feel when in the City?</u>

- <u>During the day (before 5pm)</u>
- <u>Between 8pm and 1am</u>
- <u>After 1am and before 8am</u>

In 2021, city users were asked about their perceptions of safety at different times of the day and night. These questions were previously asked in 2018 and 2016. Each timespan had a ‘do not use the City at that time’ option so that respondents were only asked for their perceptions of safety at the times they use the City.

Like previous results, most city users (98%) felt 'very safe' or 'quite safe' in the City during the day.

A key finding of the 2021 survey was that more people were in the City after 8pm compared to previous years. A low 7% of city users say they do not visit the City between 8pm to 1am. This is well down on the 24% recorded in the 2018 and 2016 surveys

Similarly, people appear more inclined to be in the City after 1am. In 2021, 39% of city users indicated that they do not use the City after 1am, well down on the approximately 60% in 2016 and 2018.

The CUP does not give insights into why this may be. It is something to watch in future surveys to see if this is an anomaly or something ongoing.

Despite more people visiting the City late at night, fewer city users felt safe during this time. Of those who were in the City after 1am, only 54% felt 'very safe' or 'quite safe' compared to 71% in 2018. In contrast, slightly more people felt safe in the city between 8pm and 1am in 2021 compared to 2018 (80% vs 76%).

Getting the help you need

<u>Q12: if you felt unsafe in the City, would you know where to get help?</u>

This question was new to the CUP Survey in 2021. It was included to begin to understand gaps in knowledge as to where to seek help if needed. Awareness campaigns can then be appropriately targeted.

Most city users (70%) said they knew where to go to get help, around one-fifth did not know, and 8% were not sure.

People who were in City on a weekend were more likely to know where to get help compared to those who came in during the week. City users who were students or aged 55 and over were less likely to know where to get help. Safety for students is an ongoing concern especially as Adelaide strives to capture more of the international student market: we know that parents are the biggest influencers of study location choice and that safety is one of their key concerns.

[1] Quacquarelli Symonds (QS), *Volume 2: Post-pandemic student marketing and recruitment International Student Survey 2021* (July 2021)

SERVICES

The City of Adelaide has a strong focus on services to the community with work underway to plan out all our activities by service, align strategic plan priorities to services, understand service demand, current levels of service, and community expectations of Council service delivery.

Service satisfaction

Q14: Overall, how satisfied are you with the services delivered by Council

This question was included as part of establishing a baseline for general satisfaction with council services, a measure on the Organisational Scorecard.

Overall, CUP respondents were moderately satisfied with council services with all responses equating to an average score of 3.8 out of 5.

Around 66% of respondents were satisfied overall with the services delivered by Council (23% 'very satisfied' and 43% 'satisfied'). Some 28% were neither satisfied nor dissatisfied, and the remainder (6%) were dissatisfied.

Overall satisfaction with services is a tricky concept for an audience as broad as 'city users' as they will have widely varying knowledge and experience of what Council delivers. Many may not know or distinguish between the services provided by the City of Adelaide and those provided by other levels of government.

A closer look at the data shows that residents are slightly more likely than other user types to be 'extremely satisfied' with the services delivered by Council (25%) and more likely than other user types to say they are dissatisfied with Council's overall service delivery (about 10%). This accords with the idea that residents would have a greater level of awareness of or interaction with Council's range of services.

The high proportion of neutral responses to this question demonstrates the scope to promote council services to increase awareness of them among city users. Further investigation around service gaps would inform service improvements that could see the proportion of respondents in the 'very satisfied' category increase over time and those in the neutral range move toward satisfaction.

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