City User Profile Survey

September 2018

CITY OF ADELAIDE

Contents

Introduction

Each year the City of Adelaide conducts its survey of city users to better understand why people come into the city, how often they visit, and how things have changed over time.

The City User Profile (CUP) survey, which originally started out as a customer satisfaction survey, has been undertaken regularly since 2002. Over time, survey methodology has been adapted to meet advances in technology such as the proliferation of mobile devices, and other social changes. In response to the declining number of households with a landline telephone, telephone surveying was discontinued in 2012 and people are instead interviewed on the streets of the city. Despite the change in surveying techniques, the questions have remained largely unchanged to ensure that the information gathered may be compared over time.

Since its inception, the CUP survey has established itself as one of the key sources of primary data used by the City of Adelaide for policy development, planning for program and service delivery, and tracking Council's progress against the City of Adelaide Strategic Plan 2016-2020. Importantly, the longevity of the survey allows for long-term monitoring of city user behaviour and can help to identify emerging trends for the future.

The 2018 CUP survey uses the same methodology of data collection used since 2012. Between late April and early May 2018, over 2,000 City users were interviewed using a random intercept method in the suburbs of Adelaide and North Adelaide.

City of Adelaide City User Profile Survey 2018

Fieldwork: 20 April to 14 May 2018

Total number of responses: n= 2,041

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

Glossary of terms

City user

anyone who is in the city for any reason during the surveying 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 survey.
This includes secondary, tertiary and vocational educational institutions.

City resident

refers to city users who live in the suburbs of Adelaide and North Adelaide (postcodes 5000, 5001 and 5006).

City visitor

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

Inner suburbs

refers to postcode areas within a 10kim radius of the city centre.

Random intercept method

respondents randomly are intercepted 'on street' and asked to participate in the survey.
The sample is said to be random as there is no regular or discernible patter or order.

Note: Except for city visitor, an individual can identify with more than one user type
e.g. city resident and city worker.

Key findings 2018

- More people were shopping and visiting the Park Lands in 2018 compared to 2017; 88% of city users said that they shopped in the city at least once a year while 63% visited the Park Lands at least once a year. This compares to 72% for shopping and 34% for Park Lands visitation in 2017. While the share of city users who were shopping in 2018 is consistent with historic averages (around 80%), there is evidence of a slow but steady growth in Park Lands visitation since 2007.
- There were also more people in the city mainly for work. In 2018, 25% of city users indicated that their main reason for being in the city was work, compared to 17% in 2017.
- The number of city users travelling by public transport continues to exceed those who travel by car. In 2018, 43% of city users came to the city via public transport while 36% came in by car. Although public transport usage fell from the all-time high of 50% in 2017, public transport was still the most popular mode of transport for city users.
- The city continues to provide for a diverse range of activities. This is highlighted by the fact that most people do more than one thing while they are in the city. Having a coffee, shopping in Rundle Mall and dining out were the most popular secondary activities for city users.
- People aged 15 to 24 years remain the largest age group amongst city users with one in four falling into this age range; however, this share has declined compared to previous years. The next largest age group were those aged 25 to 34 years, accounting for one in five city users. The distribution amongst the other age groups was equal this year at 14%.
- Just over half of city users lived within a 10km radius of the CBD while a further 20% lived in the outer suburbs. 14% of people interviewed indicated that they were residents of the city while the remainder were visiting from regional South Australia, interstate or overseas.
- People were asked why they chose to come in the city for non-work or study purposes. Many said that they chose to come to the city as it was close to where they lived, that their appointments were in the city, or they were just looking around or looking for something to do. City users also remarked that they came to the city for attractions that were unique to the city such as the Art Gallery, Adelaide Oval and the Central Market.
- The survey also asked what people loved about the city. Many said that they loved the atmosphere, whether this was the calm of the Park Lands or the buzz of having things 'happening' in the city. Some people loved specific attractions such as the Zoo, Art Gallery, Museum and the Riverbank while others loved the city for its size and accessibility.

What a typical city user may look like

Sandy – City Worker

Sandy is 38, works as a Manager in a government department and lives in Unley with her partner and two dogs. As Sandy and her partner are keen 'foodies', they like to dine out at one of the city's many eateries or go for an evening out about once a week.

Sandy likes to stay active and goes to the gym after work most days of the week. As she works relatively long hours, Sandy is not a huge fan of public transport and prefers to drive in. Sandy loves working in the city as it has a large variety of shops and she can always quickly pop into her favourite during a lunch break. She also loves the Park Lands and the squares as they provide the perfect place for her to get away from her desk and have her lunch in more peaceful surrounds.

Sam - City Student

Sam is 21 and is studying full-time management/ commerce at the University of South Australia. Since Sam lives in a share house in the inner suburbs, he usually takes the bus into the city most days of the week.

Sam likes to keep busy and there are plenty of things in the city to keep him occupied. In addition to studying, Sam also works part-time in the city. In between working and studying, Sam also manages to find time to shop in Rundle Mall, meet up with his friends in the city on a regular basis, as well as come in for an evening or night out a couple of times a month. As a regular city user, what does Sam love most about the city? "It's alive and full of people."

**stock photography used*

Jenny - City Visitor

Jenny is in her early 60s and lives in the inner suburbs with her husband and her three cats since the children have long moved out of the family home. Jenny likes to come into the city on the weekend especially on a Sunday.

As Jenny is a self-funded retiree, her average spend when she is in the city is about $100. This covers her shopping in Rundle Mall as well as grabbing a coffee or lunch. Jenny usually comes into the city about two to three times a month and doesn't really come to the city in the evenings, because she prefers to stay at home to keep her three cats company.

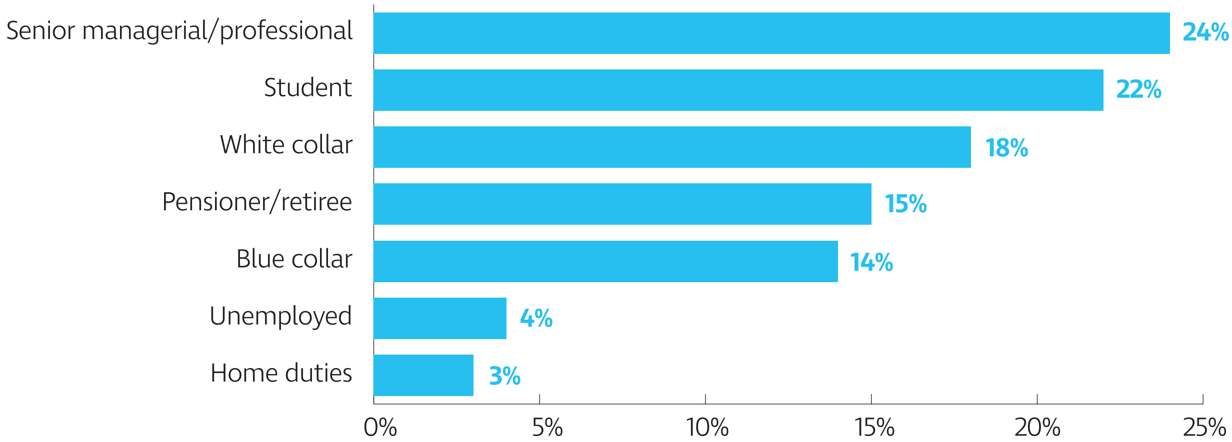
Mitch - City Resident

Mitch is 30 and lives by himself in the city. Mitch loves living in the city as it allows to him walk to work, which is also in the city. He is also a big fan of the Park Lands and likes to visit a couple of times a week to go for a run, especially along the Torrens.

Mitch is environmentally and ethically conscious – making most of the locally sourced produce from the Central Markets as well as other markets around the city. Living in the city means that Mitch is also keen on the small bar scene. He loves the variety in the laneways for food and drink and usually goes for a night out at least once a week.

Who are our city users?

Occupation



Household Type

28%
Couple only households

13%
Group households

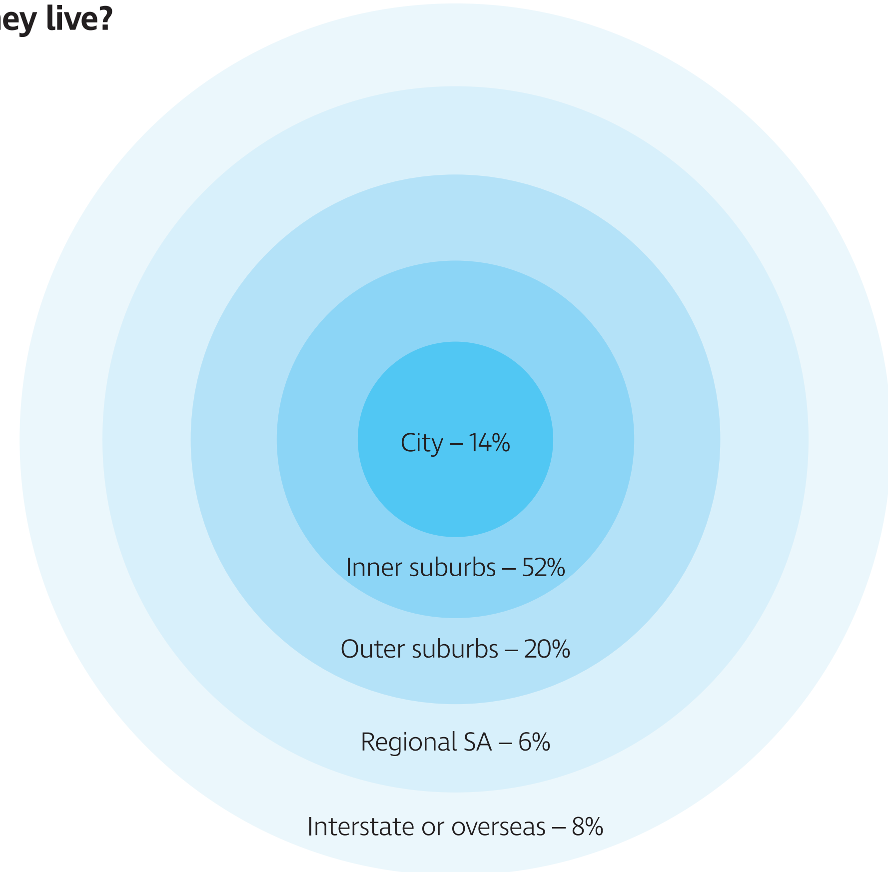
20%
Single person household

12%
Family with young children

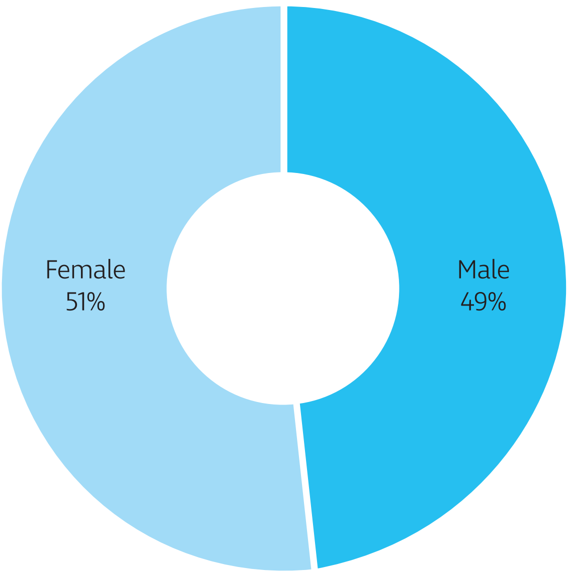
19%
Family with adult children

9%
Family with teenage children

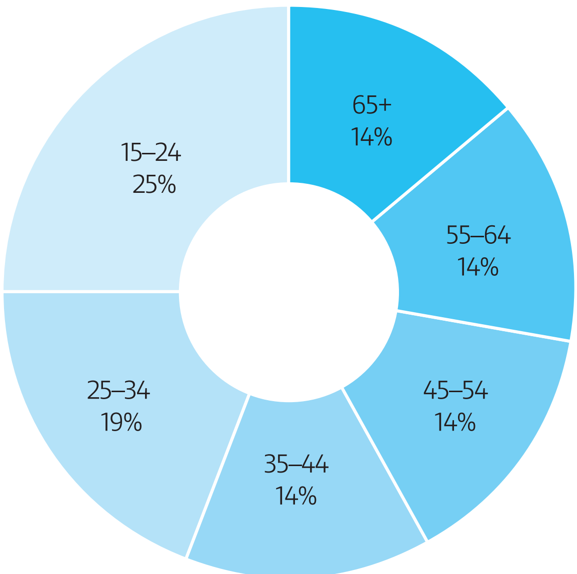
Where do they live?



Gender



Age



What are they doing in the city?

25% Working

19% Shopping

12% Studying

12% Wine/Dine

8% Appointments

How have they travelled into the city?

36% By car

28% By bus

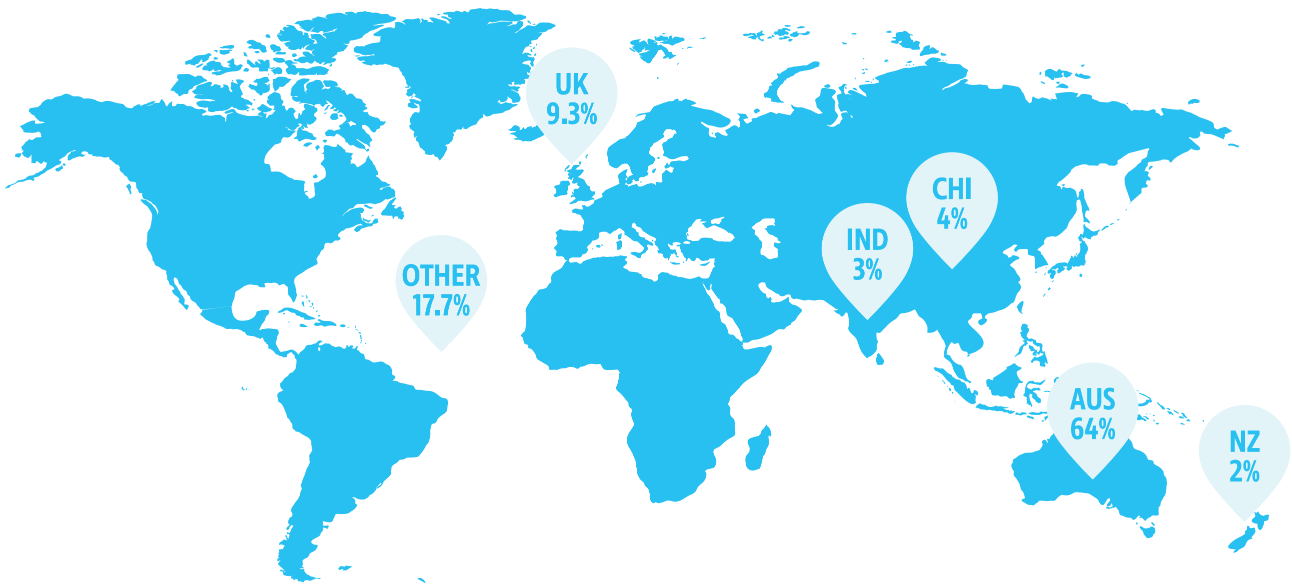
18% Walk

10% By train

5% By tram

5% Other

Country of Birth



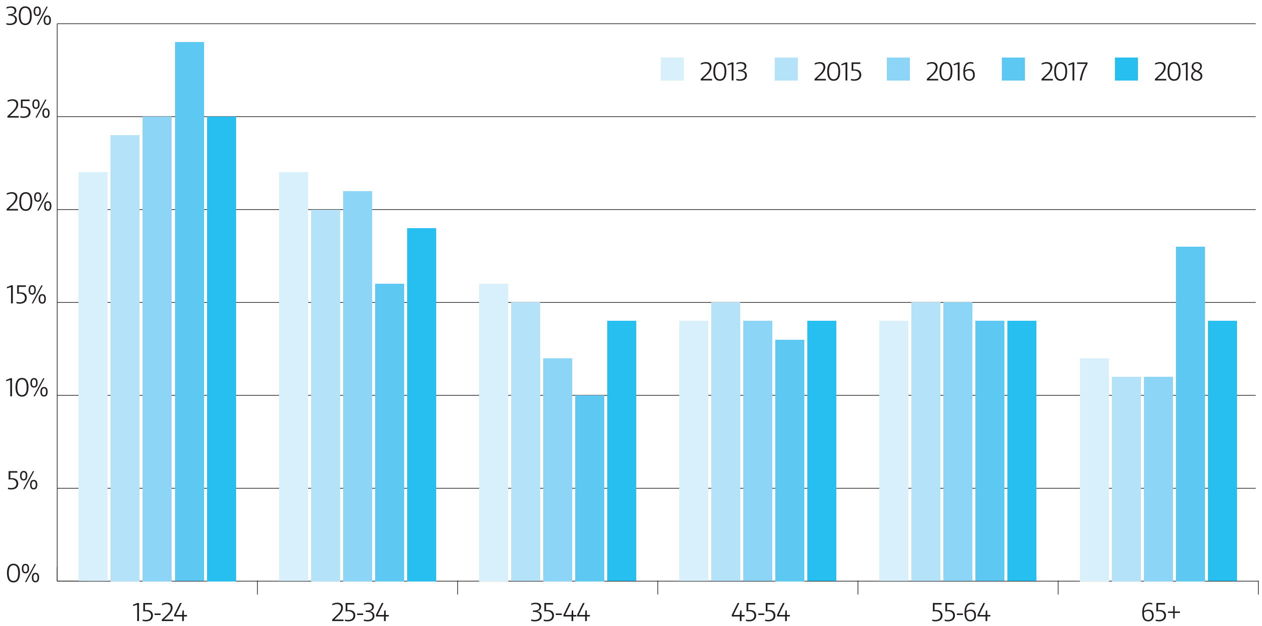
The demographic makeup of city users has largely remained constant over time. It is characterised by a high proportion of people aged under 35 with an equal mix of male and female.

In 2018 there were fewer city users aged 15 to 24 and more aged 25 to 44 than in previous years and this shift is consistent with having fewer city students and more city workers in the sample. Although the number of city students has fallen since 2017, it is consistent with historical trends and matches the growth trajectory in international education experienced at the state level.

Like other capital cities in Australia, Adelaide has a relatively large international student cohort that both studies and lives in the city. The change in younger city users is likely to reflect the overall number of students that are in the city at any one time. For international students, factors such as policy settings around student visas, the relative attraction of Adelaide as place to study, and the value of the Australian dollar can all have an impact on student numbers in the city.

As Figure 1. shows, there are no clearly identifiable trends in most age groups except for people aged 65 and over, of whom the share has slowly risen since 2013.

Figure 1: City users by age - trends

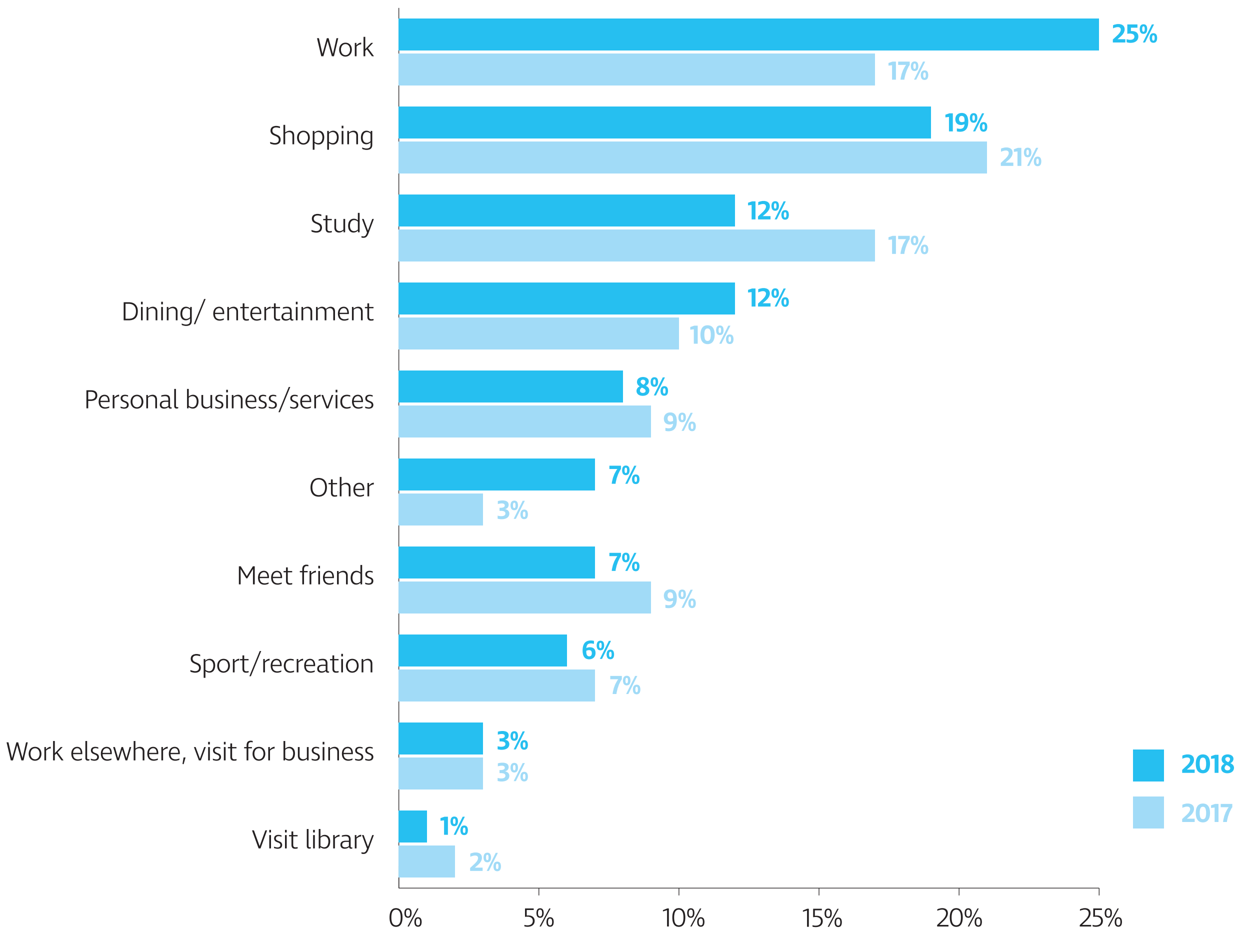


What are people doing in the city?

Main reason for being in the city

People come into the City for many different reasons, however there is usually one main reason for being here. In 2018 the top main reasons for being in the city on the day of interview were for work (25%), to shop (19%) and to study (12%). Compared to 2017, more people were coming into the city mainly for work and fewer people mainly for shopping and studying as depicted in Figure 2. While there are significant changes in the number of city users working and studying over the last year, the 2018 are results largely consistent with historic averages, which could suggest an anomaly in the 2017 data. The decrease in the number of city users in the city mainly for study could also be attributed to the increasing trends towards off-site study.

Figure 2: Main reason for being in the city - comparison



Coming into the city for dining and entertainment was an increasingly popular activity with one in ten people saying that this was their main reason for being in the city. In fact, in 2018, the share of city users who came in mainly for dining or entertainment was at its highest in the history of the survey. This suggests that people continue to benefit from the development of the small bar and dining scene as a result of the introduction of the new liquor licensing legislation in 2013. Data from Consumer Business Affairs South Australia shows that the number of liquor licences issued in Adelaide and North Adelaide has grown exponentially over the past few years averaging around 60 licences issued per year between 2014 and 2016 compared to an average of 20 per year from 2004 to 2013.[1]

1 Liquor & Gaming licences at September, 2017, Consumer Business Affairs SA, https://data.sa.gov.au/data/dataset/liquor-gaming-licences

The rise in the popularity of dining and entertainment activities coincides with an increase in the frequency with which city users who come in for leisure or entertainment do so. In 2013, 55% said that they came to the city for leisure or entertainment at least once a month; by 2018, this had increased to 62% (Figure 3a). Similarly, city users who indicated that they never came into the city for leisure or entertainment fell from 16% in 2013 to 5% in 2018 (Figure 3b). This is a sound indication that the city's offer in relation to dining, leisure and entertainment is growing in strength as an attractor for visitation.

Figure 3a: How how often do you come into the city for leisure/entertainment?

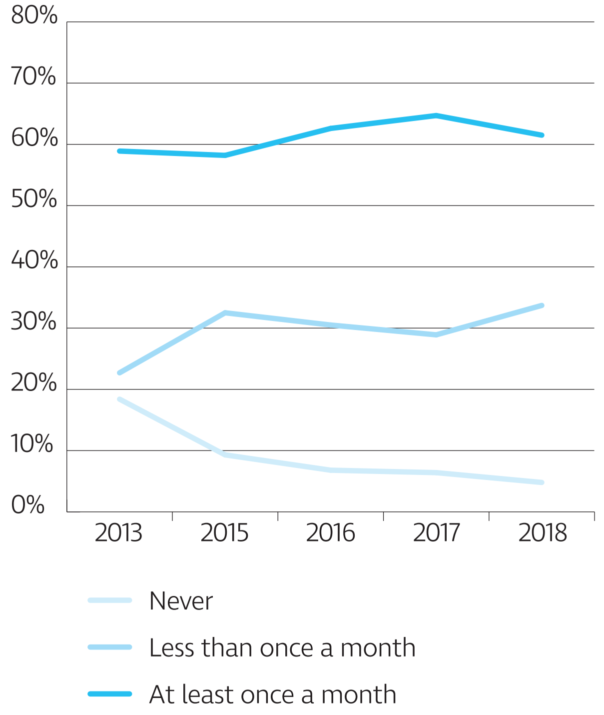
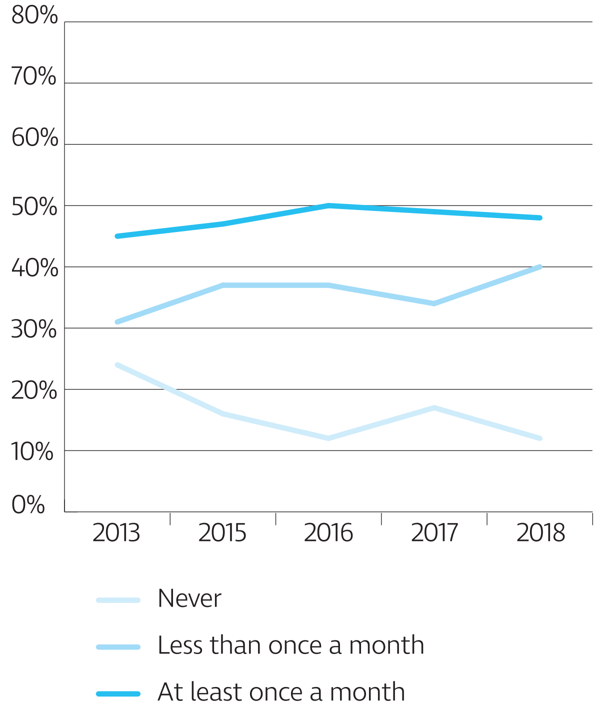


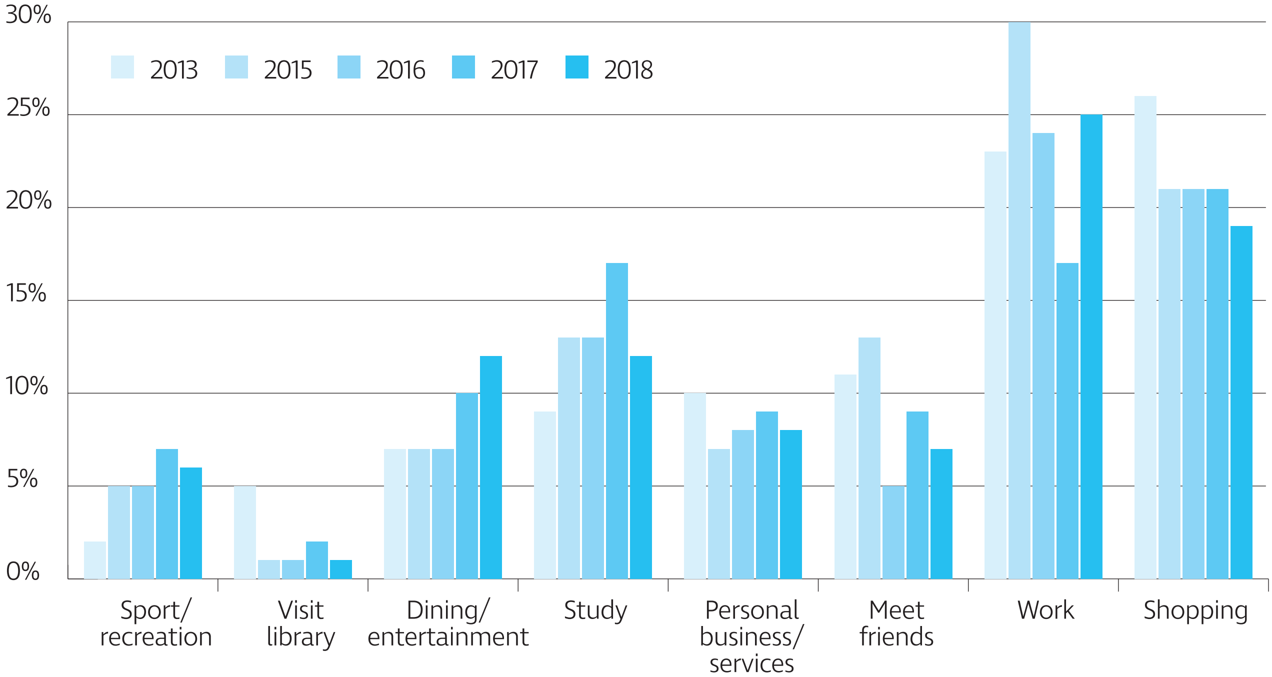
Figure 3b: How often do you come into the city for an evening or night out?



Similar trends were identified when people were asked how often they came into the city for an evening or night out. Although the number of people who came to the city for an evening or a night out at least once a month only grew slightly over the five-year period (from 45% to 48%), the proportion of people who said that they never came to the city for an evening or a night out had halved from 24% to 12%. This suggests that there are more people coming into the city for an evening out in 2018 than in previous years. This is a positive sign for city growth and may reflect the increasing diversity in the evening offer of the city.

Looking at other trends since 2013, there has been a decline in the number of people coming in mainly for shopping or to meet friends. In contrast, coming to the city mainly for sport and recreation has become more popular. This could be partially attributed to the redevelopment of the Adelaide Oval which has attracted record crowds for sporting and other events such as concerts.

Figure 4: Main reason for being in the city - trends

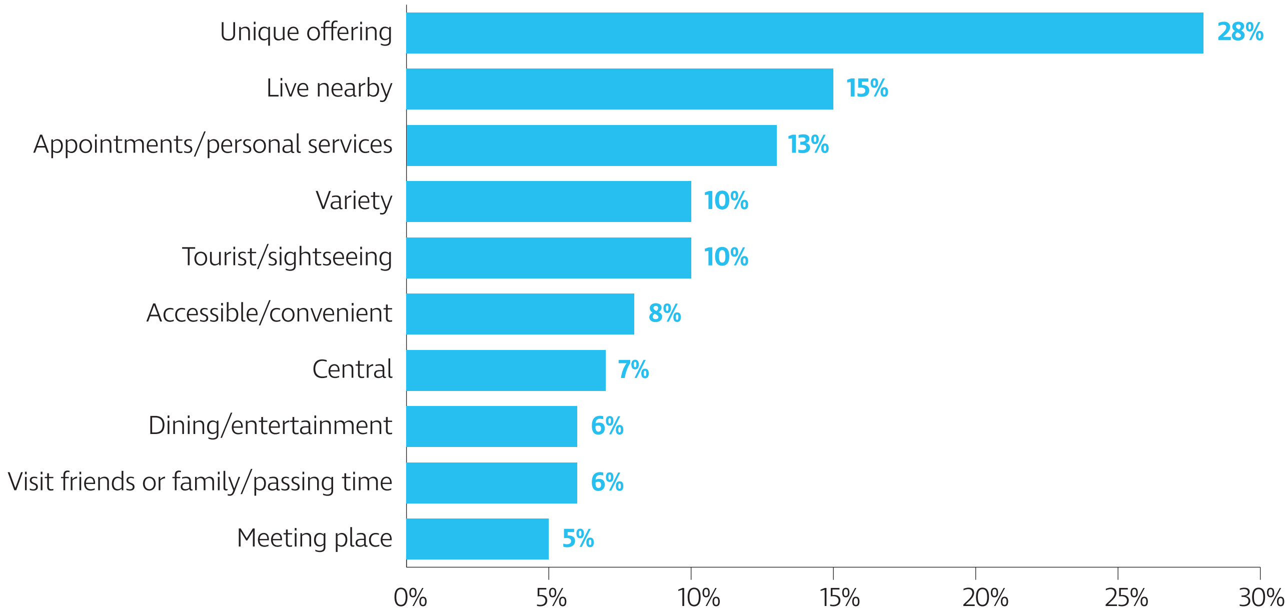


Looking at the split between different days of the week, city users were more likely to be here mainly for work on a Tuesday, Wednesday and Thursday while those who were here mainly for study tended to do so on a Thursday or Friday. People who were in the city on a weekend were either mainly shopping, particularly in Rundle Mall, or visiting the Park Lands. Interestingly, Wednesdays appears to be the most popular day for city users to make appointments for personal business or services such as going to the bank or the hairdressers.

To gain deeper insight, city users were asked why they chose the city for their main activity apart from having to work, study or live here. The most popular reason for choosing the city was its unique offerings, that is, the characteristics or attributes of the city that couldn't be found anywhere else. Examples include the buskers in Rundle Mall, North Terrace, or specific shops or attractions that city users liked to visit or were recommended by others. Specific attractions such as Adelaide Oval, the Art Gallery, Tasting Australia and even the Apple Store were also mentioned.

Other reasons for choosing the city included proximity, appointments or specialists located in the city, a greater variety of shops, passing time, or sightseeing.

Figure 5: Top 10 reasons for choosing the city for your main activity



Below are some of the feedback provided by our city users

"Always things to see and do with a variety of services"

City visitor, 23, Male

"To see the Japanese Gardens for the first time"

City visitor, 44, Female

"I always shop here as it's easy to get into the City"

City visitor, 72, Female

"I like the Mall – it's outdoors and not claustrophobic. There are a variety of stores and I like the vintage stores"

City worker, 31, Female

"[I] don't like Westfield or big shopping centres – the city has more interesting food and restaurants"

City worker, 60, Male

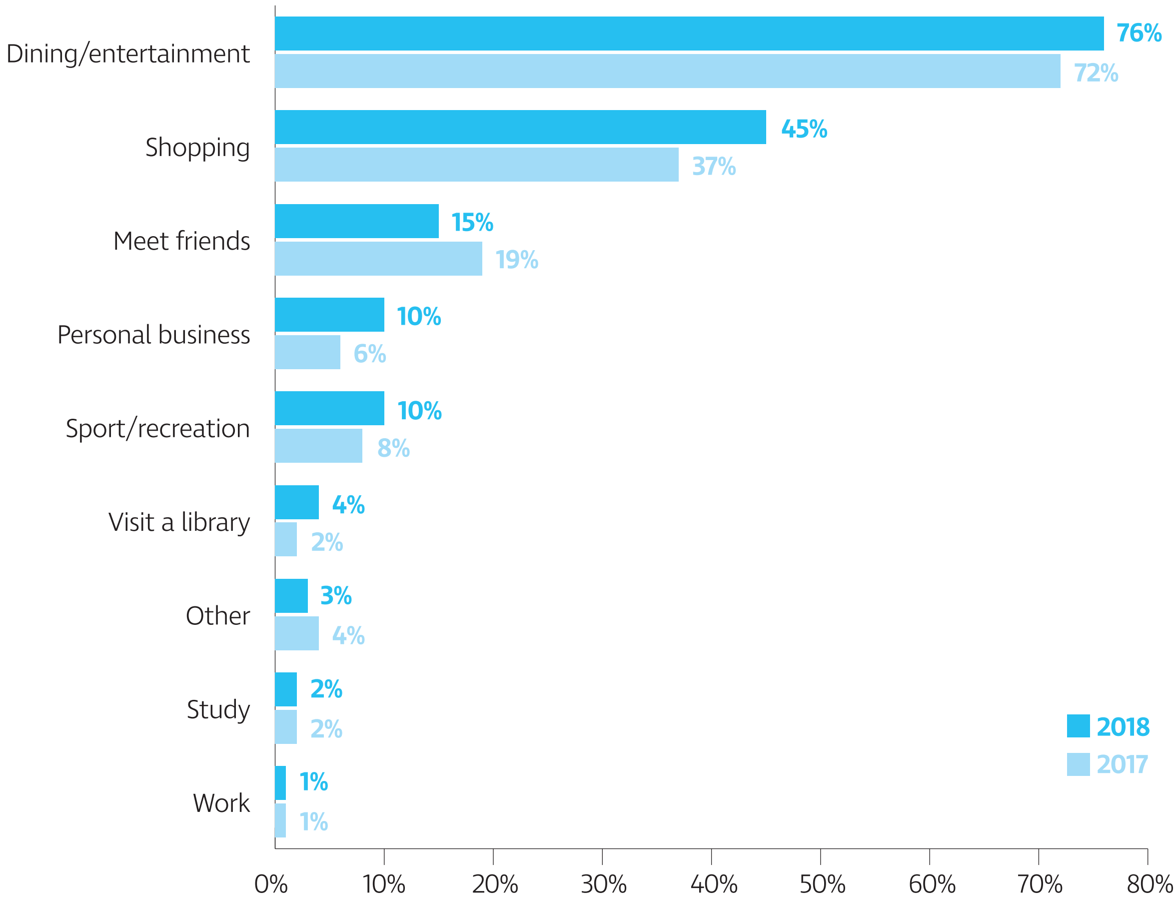
"The Central Markets have great organic produce with good varieties and selections"

City visitor, 32, Male

Other reasons for being in the city

Consistent with past survey results, most city users did more than one activity while they were here. In 2018, the most popular secondary activities were dining and entertainment, shopping, and meeting friends. While these activities were similar to the results in 2017, the uptake of these activities fell slightly, with the exception of shopping which increased from 37% to 45%.

Figure 6: Other reasons for being in the city - comparison



Dining and entertainment have always been popular secondary activities for city users and this has grown over the past few years. Of the people who indicated that they did more than one activity, three out of four said that they also either had a coffee, went to a restaurant or bar, or visited an entertainment venue such as the cinema or Casino. Only 37% of city users did something dining or entertainment related in 2013 as a secondary activity. Once again this could possibly reflect the ongoing impacts of the small bar licensing legislation and the proliferation of eateries due to Council's and the State Government's efforts to 'activate' laneways and other underutilised areas of the city.

For city residents, popular secondary activities included shopping and personal services such as hairdresser appointments. City students liked to shop in Rundle Mall and meet friends in addition to studying. City visitors were big fans of visiting cafes and having a coffee with 57% of city visitors doing this in addition to their main activity. City workers were the least likely of all user types to undertake a secondary activity.

Dining out as a secondary activity was more popular on Fridays and Saturdays than any other day of the week while going to nightclubs, pubs and bars was the most popular on Saturdays. City users who visited the Park Lands, the Art Gallery and the Museum were more likely to do so on a Sunday, while having a coffee or visiting a café was the most popular on Thursdays.

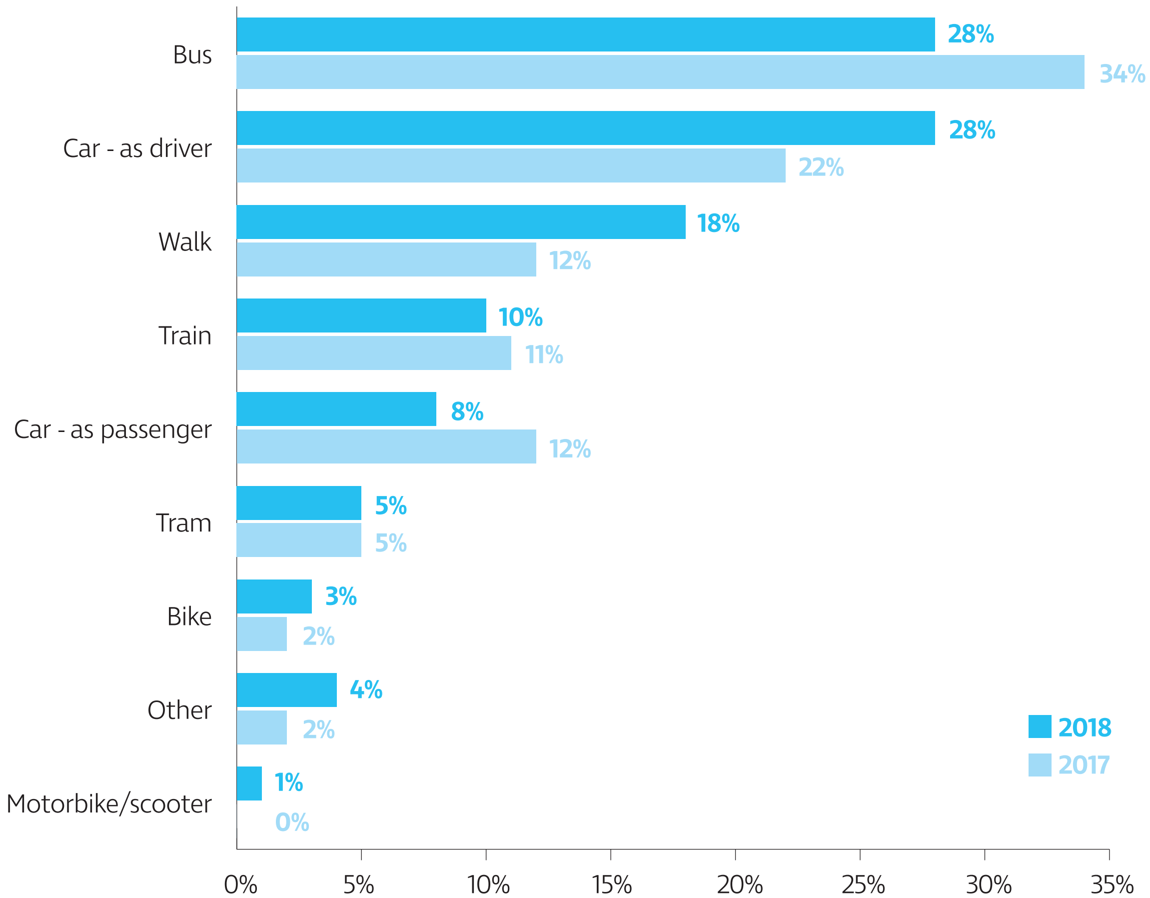
Mode of travel

Understanding how people travel to the city can assist in planning for more effective transport systems that cater to all city users.

In 2018 catching the bus and driving in were the most popular ways of getting into the city, followed by walking and catching the train.

Compared to the previous year, the number of city users catching the bus decreased from 34% to 28%, matched by an equal but opposite change in the number of people travelling by car. The share of city users who walked to the city increased, however the use of other transport modes has stayed the same.

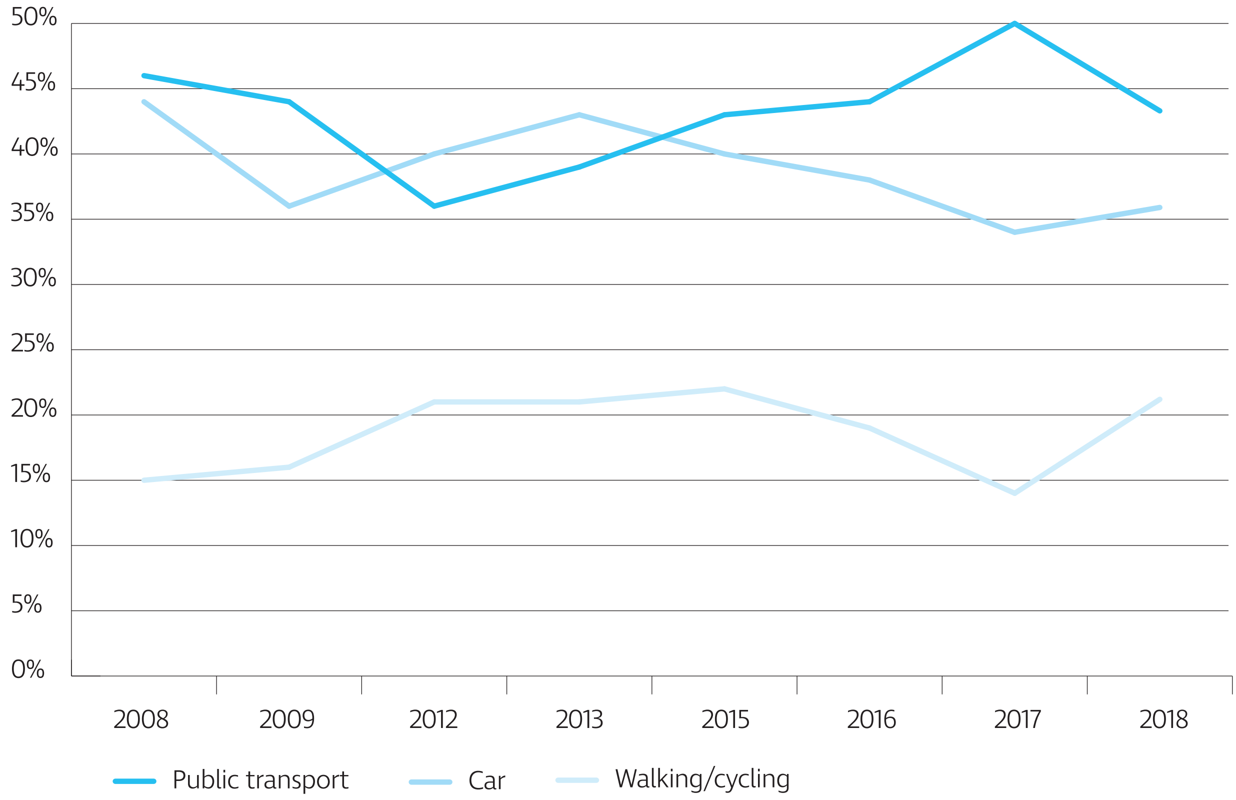
Figure 7. Mode of travel - comparison



As a combined category, public transport usage was the most popular transport mode in 2018 at 43% though this had dipped from the record high of 50% experienced in 2017. Combined car usage, that is travelling as a driver or passenger totalled 36% in 2018 and is at a similar level to the previous year.

The 2018 results show that the trend towards greater public transport usage and declining private transport usage continues as highlighted in the graph below. Various factors such as the ongoing improvements to the public transport system and perhaps the increasing costs of parking in the city could be some of the reasons behind these trends.

Figure 8. Mode of travel - trends



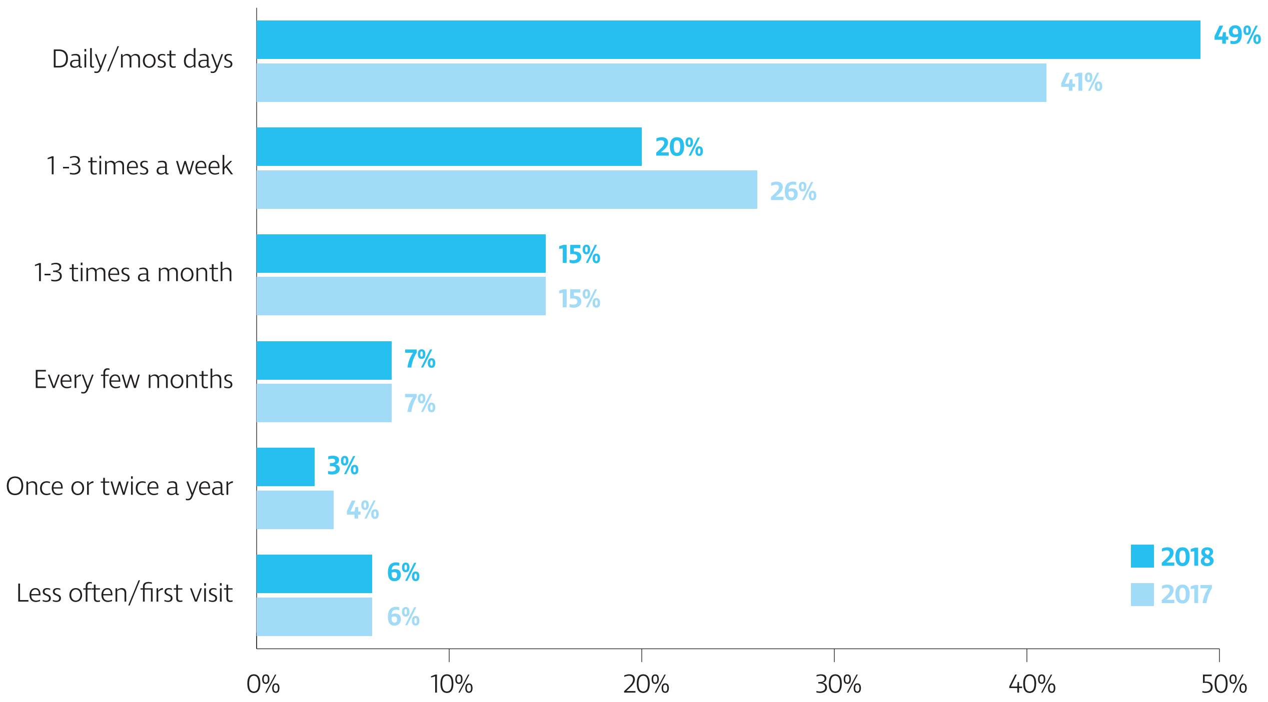
Different city user types also had different preferences in terms of their transport options. City residents were more likely to walk while city students and city workers were more likely to catch the bus. City visitors, on the other hand, were more likely to drive.

City users aged 35 to 54 had the highest proportion of people driving in while people under the age of 25 were more likely to use public transport. The survey also found that males were more likely to be driving while females were more likely to be travelling as a passenger. City users in a managerial or professional occupation were more likely to drive while self-funded retirees were more likely to walk.

How often do people visit the city?

Another important piece of information captured from the survey is understanding how frequently people came into the city. Over the history of CUP, around one in two city users came to the city daily or most days of the week, and 2018 is no exception. Compared to 2017, more people were coming into the city daily or most days of the week (from 41% to 49%) while fewer people were coming in one to three times a week (20% compared to 26% in 2017). As the number of people coming in less frequently than once a week has remained the same over the past year, it is highly likely that the increase in people coming in daily/most days is because city users who came in one to three times a week in 2017 are coming in more frequently in 2018.

Figure 9. Frequency of visiting the city (general) - comparison



City users were also asked about how often they came to the city for specific activities such as work, study, shopping or for a night out. For 'compulsory' activities such as working and studying, the frequency of visiting is polarised with most people coming in either daily/most days or not at all.

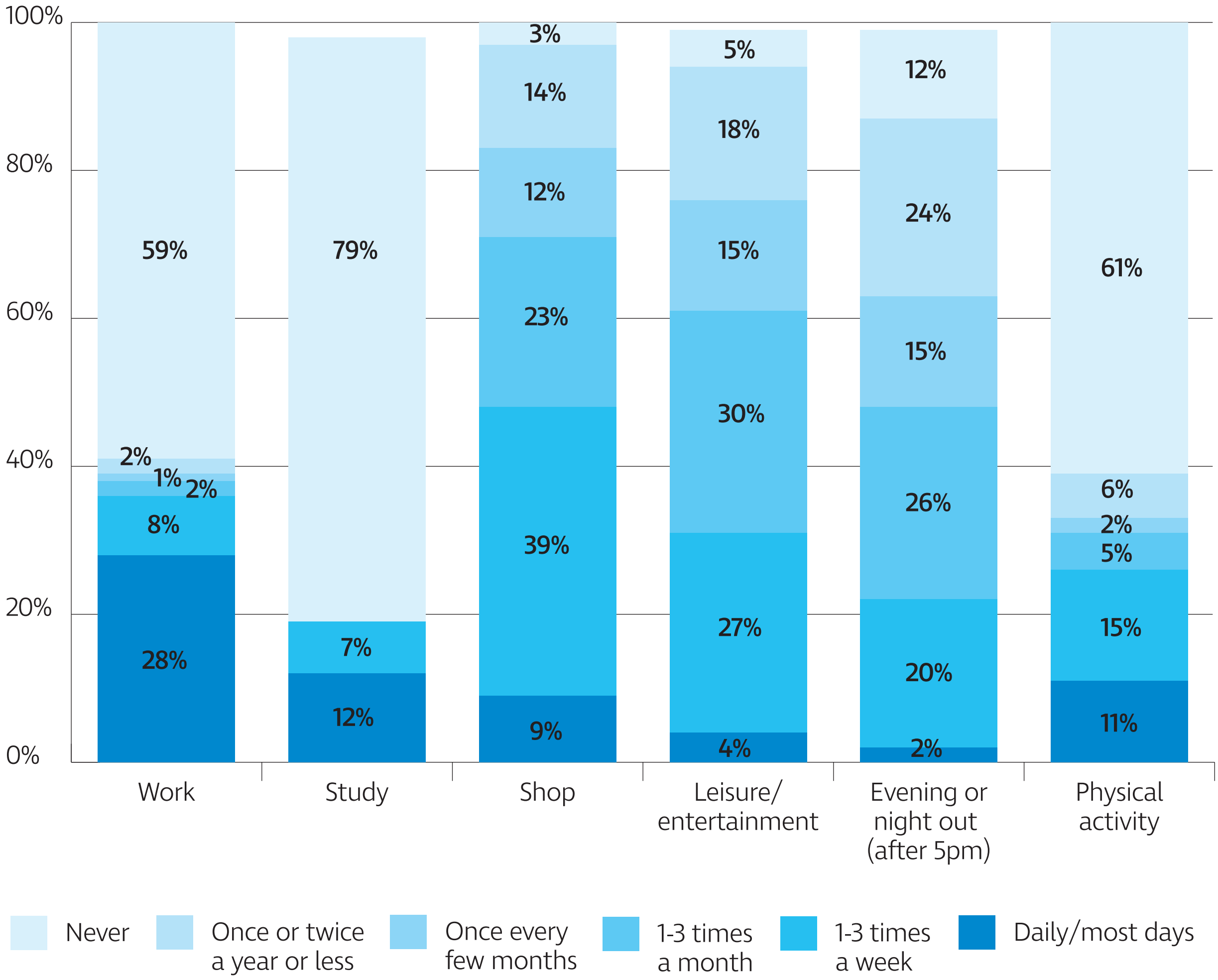
While it is expected that city workers and students will come in the most frequently, it was also interesting to see the extent to which the different user types came in for non-compulsory activities. For 'non-compulsory' activities such as shopping, leisure/entertainment, and having a night out, there was a more equal distribution of how often people visited.

Nearly all city users came to the city for shopping at some point with only 3% saying that they never came into the city to shop. The most common frequencies for shopping was one to three times a week (39%), one to three times a month (23%) and once or twice a year (14%).

Nearly all city users came to the city for leisure or entertainment. For this type of activity, people were more inclined to come in one to three times a month (30%) or one to three times a week (27%).

Coming to the city for an evening or a night out could be considered as the least popular activity as it had the highest proportion of people who never came in for this purpose (12%). However, a large number of people came to the city relatively frequently for an evening or a night out. For example, one in five came to the city for this purpose one to three times a week, while 26% came in one to three times a month.

Figure 10. Frequency of visiting the city (various activities) - 2018



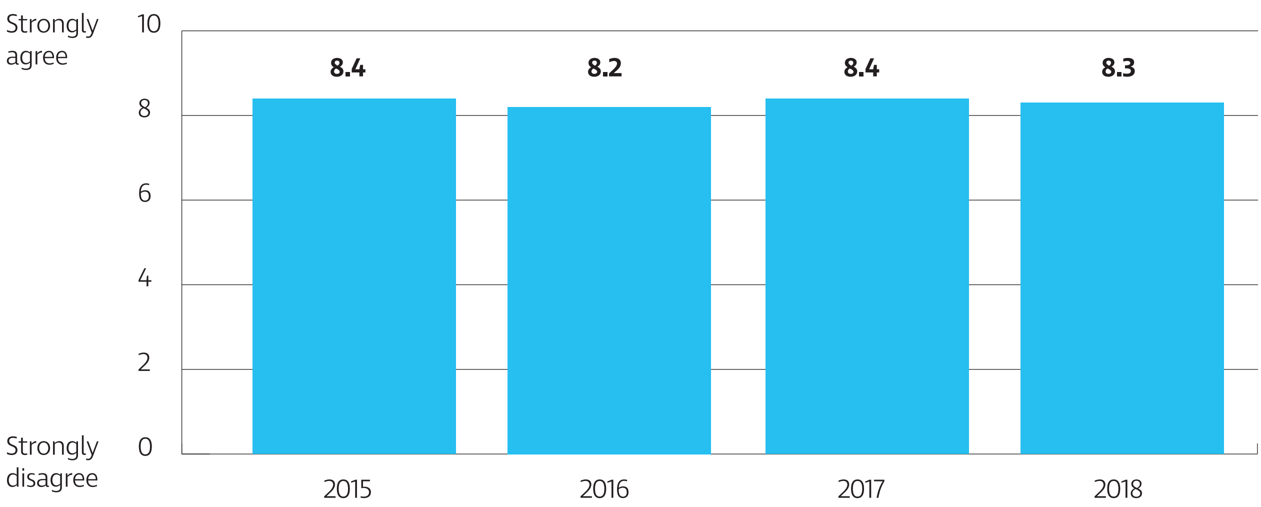
City experience

To continually improve the 'city experience', questions were included in the survey to gauge how people felt about the vibrancy of the city. One of the key questions asked was the extent to which city users agreed that the city is great place for people to enjoy events, activities and art and culture. A score of zero meant that they strongly disagreed while a score of ten meant that they strongly agreed. This data is also used to track progress of one of the objectives under the 'Creative' theme of the City of Adelaide 2016-2020 Strategic Plan.

Most city users agreed that the city was a great place for people to enjoy events, activities and art and culture with 90% giving a score of 7.0 or more, leading to an overall average score of 8.3. While all the different user groups tended to score highly with this statement, city residents and people visiting from outside the metropolitan area (including from interstate and overseas) were more likely to strongly agree (average score of 8.5). In comparison, city users who lived in the inner suburbs gave a slightly lower average score of 8.2.

This question has been included in the City User Profile Survey since 2015. The average score has remained relatively unchanged over time as shown in the graph below.

Figure 11. The City has great places for people to enjoy events, activities, art and culture (average score)



Another question related to the 'city experience' was whether people were satisfied with the diversity and quality of events and activities in the city. This question was also included in the 2016 survey.

In 2018, the average score for which city users agreed with this statement was 8.1 which is higher than the average score of 7.7 in 2016. This question was not asked in 2017.

Once again city residents were more inclined to agree with this statement, with an average score of 8.3 for this group. Older city users (aged 55 to 64) also had a greater tendency to agree with this statement while those aged 25 to 35 were slightly less inclined to agree, with an average score of 7.9.

Lastly, city users were asked what they love about the city and a number of key themes emerged. For example, 45% said that the atmosphere or the 'feel' of the city was one of the things they loved. Some city users remarked that the city was welcoming and friendly, it was clean, and that it had aesthetic appeal. People also loved the fact that the city was calm and used words like 'relaxed', 'peaceful' and 'quiet' to describe the mood of the city. At the same time, city users also loved that the city was vibrant and busy where 'there are lots of people around', that its 'alive', and there is 'lots going on'.

Entertainment in the city was another thing that people loved including categories such as the events and festivals, art and culture, and retail and hospitality. Some city users loved the 'open spaces in the Mall', and the 'nice shopping experience' while others loved 'all the events and festivals', 'Fringe' and 'Mad March'. City users also commented on the cultural diversity of the city as something they loved, and that the city had 'a lot to offer in terms of entertainment and the arts' as well as the 'variety of restaurants and shops'.

City users also loved the physical environment, whether natural or built. The Park Lands, along with greenery, featured heavily as one of the things that people loved about the city. The layout of the city and the built form was another thing that people loved with mentions of the open spaces, architecture and accessibility.

Finally, city users loved things that were unique and couldn't be found anywhere else. These included attractions such as Adelaide Oval, North Terrace, Rundle Mall, the Central Markets, the Museum, Art Gallery and the Zoo and Botanic Gardens to name a few. Below are some examples of what different user types loved about our city.

City visitor

"I love the Fringe when the streets are closed and the eateries are out on the street. I like that there are more cafes in Peel Street".

"I like the architecture, the history of it. It's good that old buildings are not being knocked down".

"It's a perfect size. You can drive in and get everything done within an hour. You don't have to sacrifice time for carparking and fighting traffic like in Sydney."

"It's friendly, clean and fantastic cultural diversity"

"Everything is close and within walking distance. Nature is so close with the Squares and the Botanic Gardens"

"It's a relaxed city. People are helpful and obliging. It's a welcoming city"

City residents

"[It's] very cosmopolitan and welcoming. Everything is here."

"Diverse cultures – all the different foods. Everything is close and convenient."

"I like the plan of the city. There's good shopping and prices are good."

"It's easy to get around. I love the Free Bus in the city and North Adelaide. Everything is here for me"

"It's very compact. I don't need to drive a car and I can ride my bike safely."

"Everything is within easy distance. It has the qualities of a big city in a small city context. It's very very clean in comparison to international and Australian cities."

City worker

"I love the Park Lands and would visit as often as possible"

"It's relatively quiet and spacious and lots of things to do e.g. shopping, museum, the Fringe, and other entertainment."

"The cost of living is cheap. The Riverbank is nice. There are more venues and side streets and markets".

"The combination of Park Lands and shops. Everything is compact. I like the Mall and the old buildings on North Terrace."

"The people, the atmosphere. It's an inviting city."

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