CUP - City User Population Research

Key insights from a decade of CUP surveys

2003-2013

Contents

BACKGROUND

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

From its inception as a customer satisfaction and profiling survey in 2002, CUP has evolved a greater focus on understanding our broader City and the demographic, attitudinal and behavioural profile of our City users. The CUP is ACC's longest running source of primary data on City users.

METHODOLOGY

Adelaide City Council has undertaken the CUP survey on ten occasions from 2002 to 2013.

Survey respondents are a random sample of City users. In 2012 the collection method moved from telephone interviews to an on-street collection to better capture a representative sample of City users on a given day and to overcome the increasing prevalence of households without landlines.

<u>Scope of data collection and anlaysis</u>

The surveys have consistently targeted people in the Adelaide metropolitan area (and from 2012 beyond that geography) who use the City as well as people who are City residents. Not all questions have been asked each time the survey has been undertaken.

In particular, from 2004 to 2008 inclusive, when ACC had a strong strategic focus on increasing the residential population of Adelaide City, the CUP surveys included additional questions around:

- how long an existing resident had lived in the City;
- where they lived previously;
- housing tenure;
- best and worst aspects of City living;
- fulfilment of their expectations of City living and in what ways it was better or worse than expected
- when and if they planned to leave the City, the reasons why, and where they planned to move to.

The CUP has often been used as a means to ask specific questions relating to measuring use, awareness or satisfaction with various Council initiatives, facilities and services. That information has been provided to various Council Programs to assess achievement against KPIs.

Data has typically been reported in each year as a whole sample and by the sub-groups of residents, students, workers and visitors.

EXECUTIVE SUMMARY

The City User Population research has revealed a number of interesting trends over time:

- Visiting the City for work or for shopping are the consistent primary drivers for City visitation.
- The most common secondary reason for being in the City is dining and entertainment which has shown a strong increasing trend since 2009.
- Public transport is decreasing as the means as the means of accessing the City
- Our City resident population remains polarised in terms of age, with large proportions of both young and older people. However, there is a general trend towards a younger population.
- Consistent with age trends, residents describing themselves as "pensioners" or "self-funded retirees" have declined since 2002.
- There is a trend towards more City residents walking or cycling rather than using private motorised transport to get to destinations within the City.
- Data collected for age, occupation, household composition and income suggest two clear profiles of City residents, which are:
    - **Young Resident:** Young, likely to be studying, living in group households and earning relatively low incomes.
    - **Mature Resident:** Older, either retired or working in senior management / professional occupations, living with spouse or alone and earning relatively high incomes.
- There has been an increase in the proportion of City students who also live in the City
- The frequency of students visiting the City for study and shopping on a weekly basis has shown a marginal positive trend since 2006.
- There has been a clear trend away from students coming from households with children to households without children over the past 10 years.
- There are more younger workers in the City
- The proportion of City workers living in households without children has increased
- There are a growing proportion of senior managers and professionals in the City's workforce.
- City usage among workers has been volatile since 2007, however has remained relatively high – particularly for shopping, other reasons (including dining, leisure and entertainment) and visiting the parklands.
- City visitors are getting younger with more aged 15-34 years than previously
- The number of City visitors who are from older couple with no children households has slowly decreased since 2007, while the proportion of visitors from young couple households with no children and group households has increased
- City visitors are keen shoppers with around half visiting the City at least monthly for shopping
- Leisure and entertainment visitors are quite polarised, with a growing proportion of visitors claiming they never visit the City for entertainment or leisure purposes and an increasing proportion saying they do so at least monthly

Each of these observations is explored more fully in the balance of this document

Note that the analysis presented in this report focuses on the activities and preferences of "proportions" of City users. It is worth noting that the total number of City users will have increased over time due to population growth, economic and employment growth and other drivers of City visitation.

GLOSSARY OF TERMS

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

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

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

Mean
The average score within a distribution.

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

Probability
The chance that a phenomenon has of occurring randomly.

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

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

Residents
Survey respondents who live in the City or North Adelaide

Student
Survey respondents who primarily visit the City for study

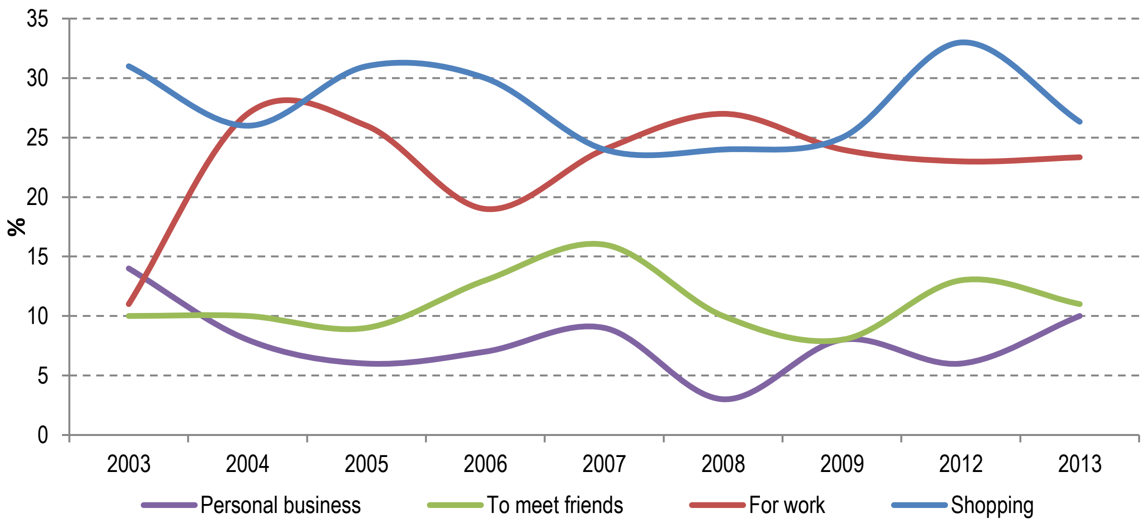
Visitor
Survey respondents that neither live, work nor study in the City

Worker
Survey respondents who primarily visit the City because it is their place of employment

KEY INSIGHTS - ALL CITY USERS

Our City population is diverse with people visiting for a variety of reasons. Of those people on street in 2013, one quarter (26%) are shopping, 23% are in the City for work purposes, 11% are meeting friends and 10% are in the City for personal business. While the proportion visiting for each purpose has fluctuated over time, visiting the City for work or for shopping have been the consistent primary drivers for City visitation.

Figure 1: Main reason for visiting the City (% of respondents, single response only)



The proportion of respondents citing shopping as the primary driver for a weekend visit has fluctuated over time from a high of 44% in 2004, to a 2007 low of 32% and 34% in 2013. On a weekend the main reason for being in the City for dining / entertainment has declined from 18% in 2005 to no more than 10% since 2009. However the most common secondary reason for being in the City (on any given day) is dining and entertainment (37%) which has shown a strong increasing trend from 22% of City users in 2009 to 29% in 2012 and is now above the 2003 high of 35%. This may indicate that the dining and entertainment offer of the City is of increasing appeal and or convenience compared to suburban offerings or that the focus on early evening activation and events is effective in promoting the City as a dining and entertainment destination.

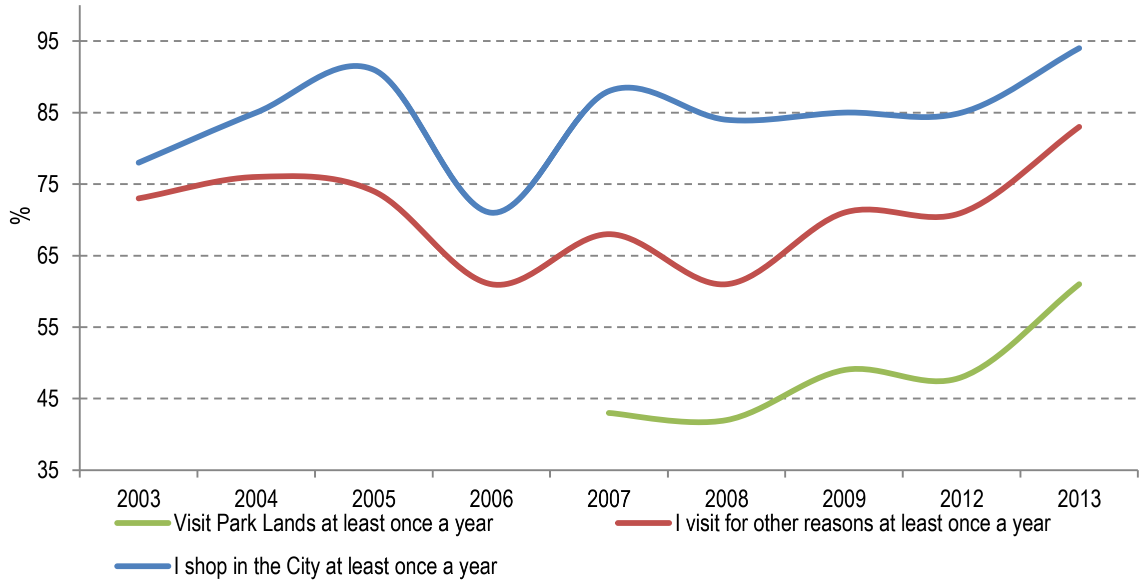
Shopping in the City is a key drawcard for both weekend and weekday visits. Of those visiting the City primarily for another reason, one third nominated shopping as their secondary reason to visit. A further 32% nominated meeting friends as a secondary reason for being in the City. The primacy of those two purposes as secondary reasons to visit the City has been consistent over time.

During the week, as may be expected, being in the City for work accounts for a larger proportion of visits (32% compared to 9% of weekend visits), a consistent trend over time.

Car travel continues to be the most common mode of transport for accessing the City, with just over two in five respondents using this method of travel. Public transport closely follows private car use with just over one quarter of all City users travelling to the City via bus. The remaining one fifth walks or rides a bike. The ongoing installation of dedicated bicycle lanes, bike boxes, scramble and timed pedestrian crossings and footpath upgrades should all influence the further take up of cycling and walking as a means of accessing and moving around the City.

Those surveyed nominated all the reasons why they use the City (not limited to a specific visit). Visiting the City for shopping at least once per year was the case for 94% of respondents in 2013, the highest level ever recorded and well above the 84% to 85% recorded in the three previous surveys. Visiting the Park Lands at least once per year (61%) was also much higher than previous years.

Figure 2: General City Visitation



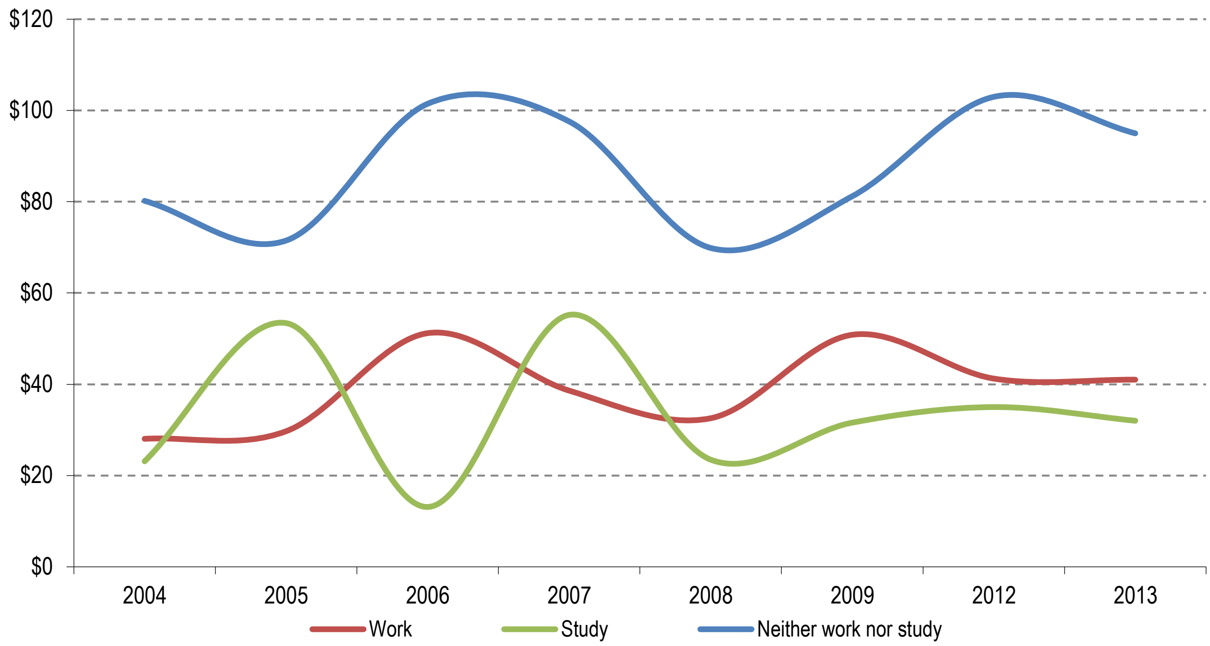
A third of those surveyed are City workers and 13% are residents. These proportions have not seen significant movements over time.

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

Visiting the City daily for work purposes has remained stable at around 80%, particularly since 2008, while being in the City daily for study has decreased from 85% of students in 2004 to 49% in 2013 which may be attributable to the increasing use of online learning materials and remote access to lectures, reducing the need for students to attend campus daily.

Average spend per visit to the City is variable. However, those who are not in the City to work or study spend the most per visit.

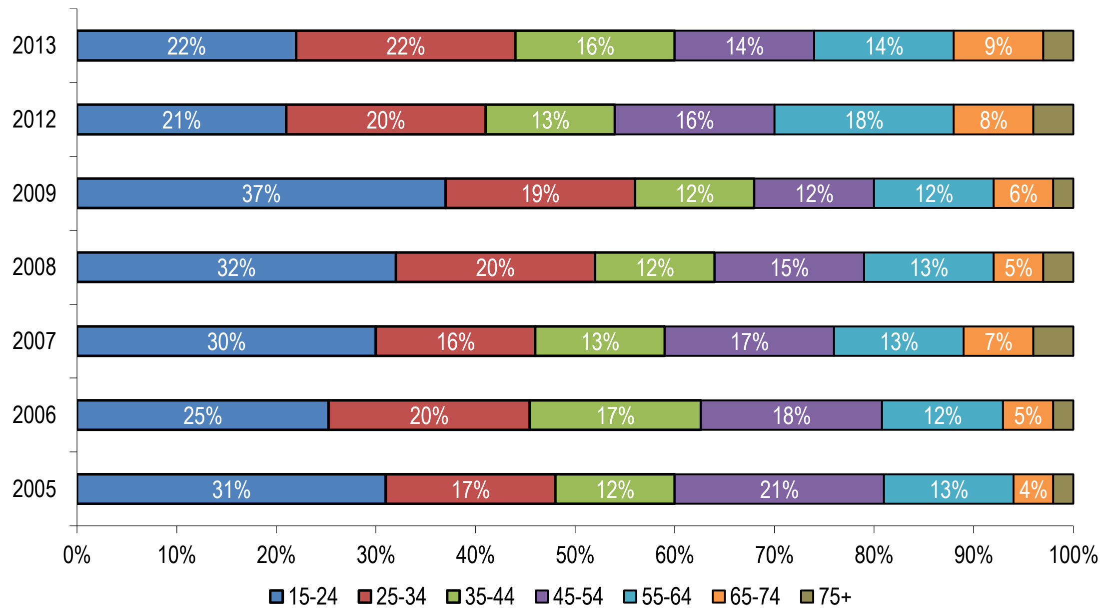
Figure 3: Average Spend by City Usage Type



Car is the most common mode of transport used to reach the City with just over two in five people travelling to the City via private vehicle, a relatively consistent level over time. Just over one quarter of all City users travel to the City via bus and one fifth walk or ride a bike. Public transport as the means of accessing the City has decreased in each survey year since 2008 (46%) to 39% in 2013.

In 2013, age group proportions have remained relatively similar to results seen in 2012. Those aged 15-24 and 25-34 hold the largest proportions (both 22%), and the proportion gradually declines by increasing age category. The lower proportion of City users in the older age ranges (55 years and over) has been a consistent observation over time, with increases in the last two survey years potentially related to the general ageing of the population.

Figure 4: Age Distribution (General)



KEY INSIGHTS - CITY RESIDENTS

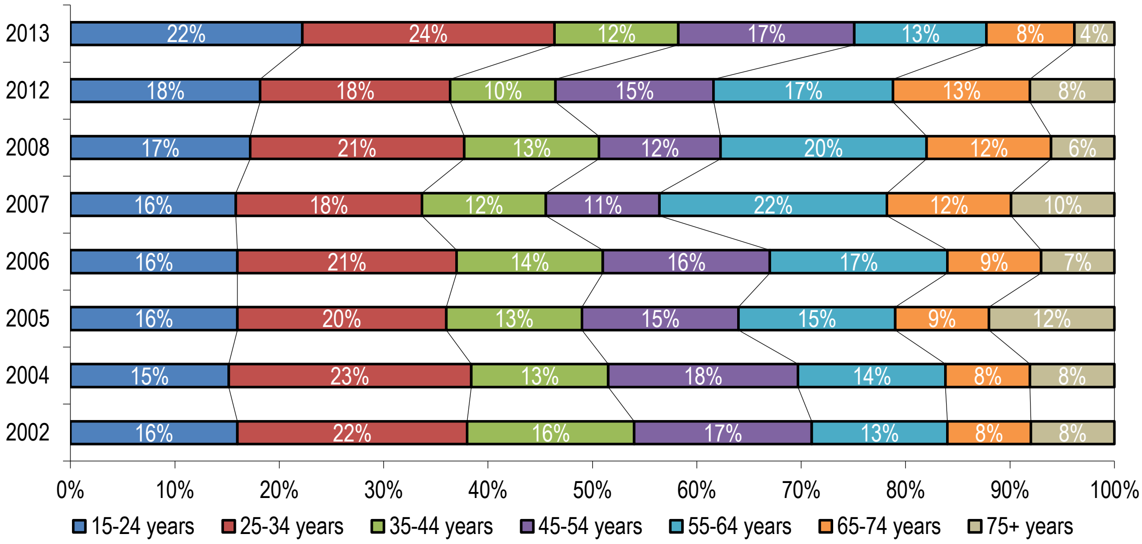
PROFILE SUMMARY

- Our City resident population remains polarised in terms of age, with large proportions of both young and older people. However, there is a general trend towards a younger population.
- Consistent with age trends, residents describing themselves as "pensioners" or "self-funded retirees" have declined since 2002.
- There has been a marginal increase in the proportion of households without children relative to households with children since 2004.
- The City's resident income distribution reveals a relatively large proportion of low income households (35% of households earning less than $600 per week in 2013) and high income households (38% of households are earning more than $1,500 per week).
- Annual City usage amongst residents is particularly high for shopping (100%) and other reasons, including dining, entertainment and leisure (90%).
- Approximately three-quarters of residents visit the City's parklands at least once a year, which is down significantly from 83% recorded in 2003.
- There is a trend towards City residents walking or cycling rather than using private motorised transport to get to destinations within the City.
- Data collected for age, occupation, household composition and income suggest two clear profiles of City residents, which are:
  - **Young Resident:** Young, likely to be studying, living in group households and earning relatively low incomes.
  - **Mature Resident:** Older, either retired or working in senior management / professional occupations, living with spouse or alone and earning relatively high incomes.

AGE BREAKDOWN

Our City resident population remains polarised in terms of age with large proportions of both young (under 25s) and older (55+) residents. There is a general trend towards a younger population in the City, which is particularly evident by the steady increase of residents aged 15 to 24 (+6 percentage points between 2002 and 2013). Residents aged between 25 and 34 also increased marginally over the same period (+2 percentage points). The proportion of residents classified by the older age groups has been volatile over the past 10 years (see Figure below), however, one may conclude that there has been static or marginal decreases in the proportion of residents in these age groups.

Figure 5: Age Distribution (Residents)



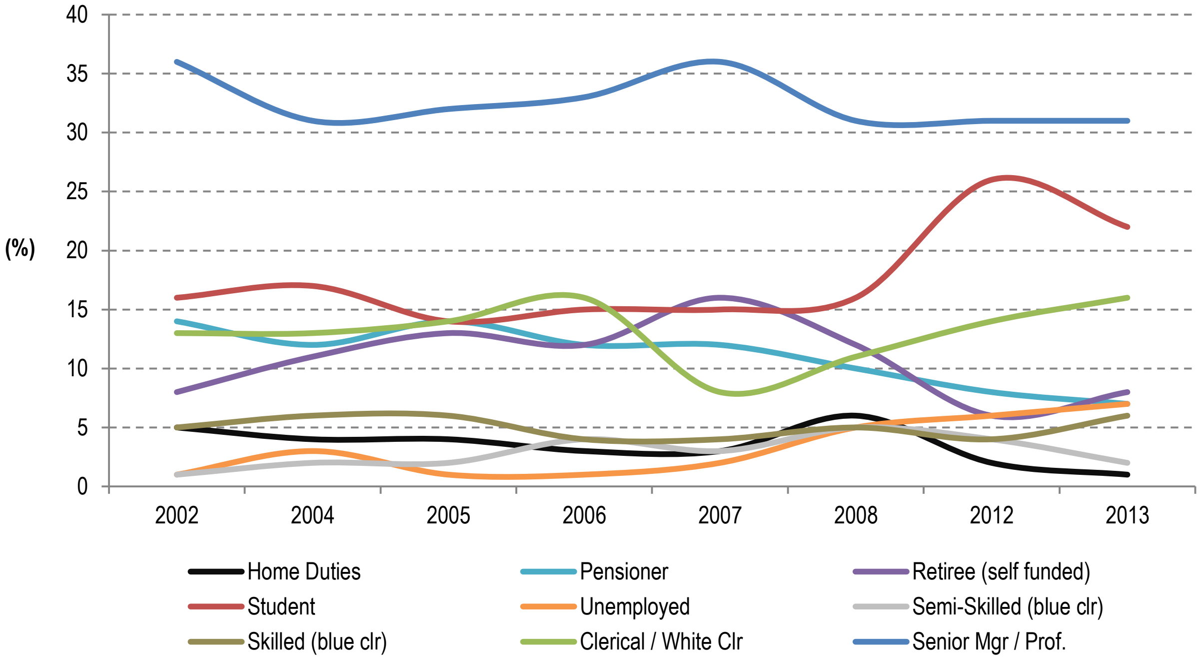
Note: Figures may not add to 100% due to statistical rounding.

OCCUPATION

In 2003, 55% of City residents indicated that they were employed, including approximately one third employed in positions described as senior management or professional. 45% of City residents were not in paid employment, of which 22% described themselves as primarily students.

The occupational breakdown of City residents in 2013 is relatively consistent with the findings of previous surveys. Of those City residents not in paid employment, the proportion describing themselves as "pensioners" has gradually declined from 14% in 2004 to 7% in 2013. "Self-funded retirees" have also declined from a high of 16% in 2007 to 8% in 2013. This is consistent with a marginal decrease in the proportion of residents the City aged over 65 (see Figure above). Similarly, the proportion of residents indicating their occupation as student has increased over the past 10 years, corresponding with similar increases in visitors aged between 15 and 34 (see Figure above).

Figure 6: Occupation Distribution (Residents)

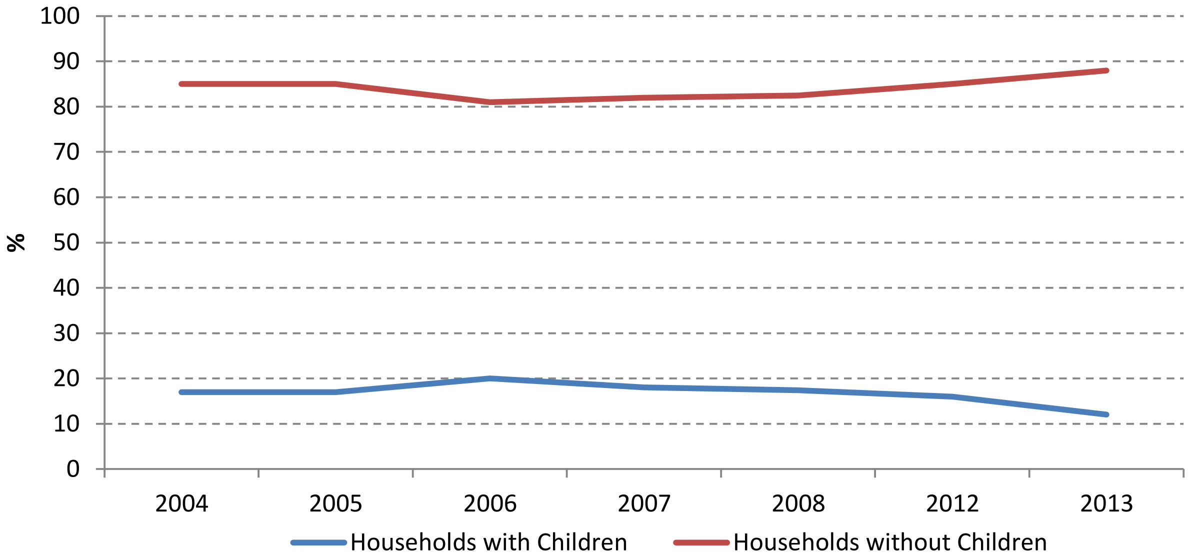


Note: The significant deviation in data noted between 2008 and 2012 is likely the result of differing X axis scaling.

HOUSEHOLD COMPOSITION

There has been a marginal increase in the proportion of households with children (+3 percentage points) relative to households with no children since 2004. This trend may be attributable to the increasing representation of younger residents in the sample, who generally live in group households or alone.

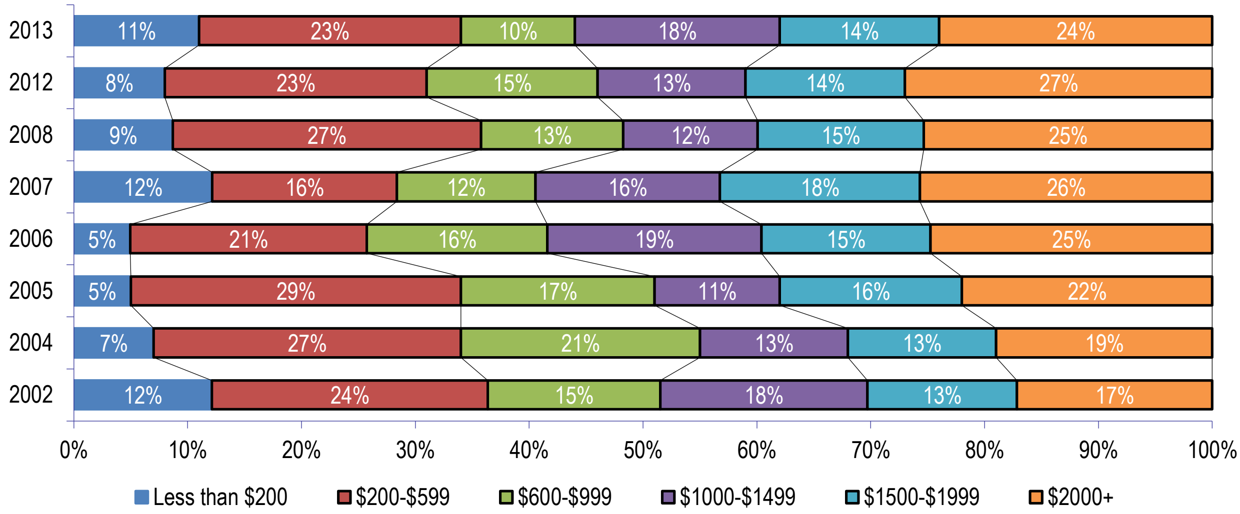
Figure 7: Household Composition Distribution (Residents)



WEEKLY GROSS HOUSEHOLD INCOME

Consideration of the City's resident income distribution reveals a relatively large proportion of low income households (34% of households are earning less than $600 per week in 2013) and high income households (38% of households are earning more than $1,500 per week). This aligns with age and occupation data collected indicating large proportions of younger and older residents.

Figure 8: Gross Weekly Household Income Distribution (Residents)



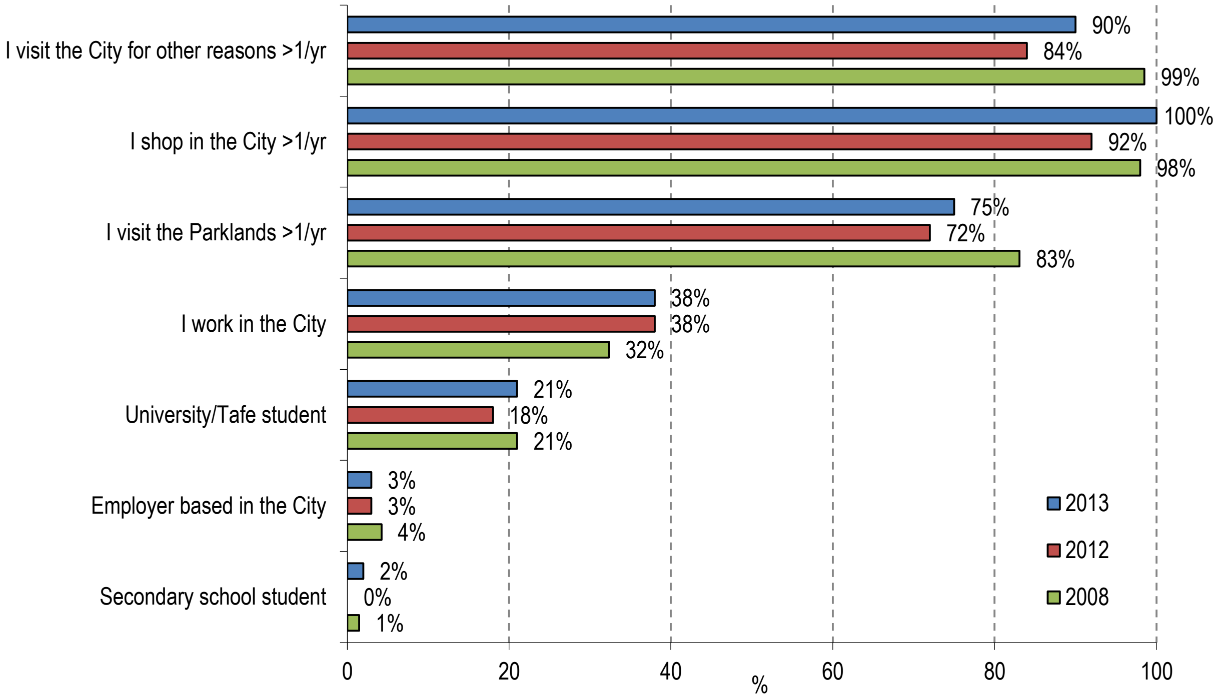
Note: Figures may not add to 100% due to statistical rounding.

RESIDENTS' CITY USE

Residents were asked whether they use the City as a student, worker or for other reasons such as shopping and / or visiting the Park Lands. This question was included in CUP for the first time in 2008 and was not asked in 2009. As expected, usage among all categories is high, as the respondents are residents and are in the City very frequently. Annual City usage amongst residents is particularly high for shopping (100%) and other reasons including dining, entertainment and leisure (90%).

Longer term trends can be observed in parkland visitation and City employment. Approximately three-quarters of residents visit the City's parklands at least once a year, which is down significantly from 83% recorded in 2003. Conversely, there has been an increase in the proportion of residents that are employed in the City, which can naturally be linked to the general increase in the proportion of employment opportunities the City provides in relation to the Adelaide Metropolitan region.

Figure 9: City Usage (Residents)



Note: Includes multiple responses.

MODE OF TRAVEL

There is a trend towards City residents walking or cycling rather than using private motorised transport to access destinations within the City. The proportion of residents walking or cycling to City destinations has increased from 66% in 2008 to 76% in 2013. Conversely, private transport use among residents has declined from 33% in 2008 to 16% in 2013. Public transport use (as a proportion of total use) among residents has remained static over the same period.

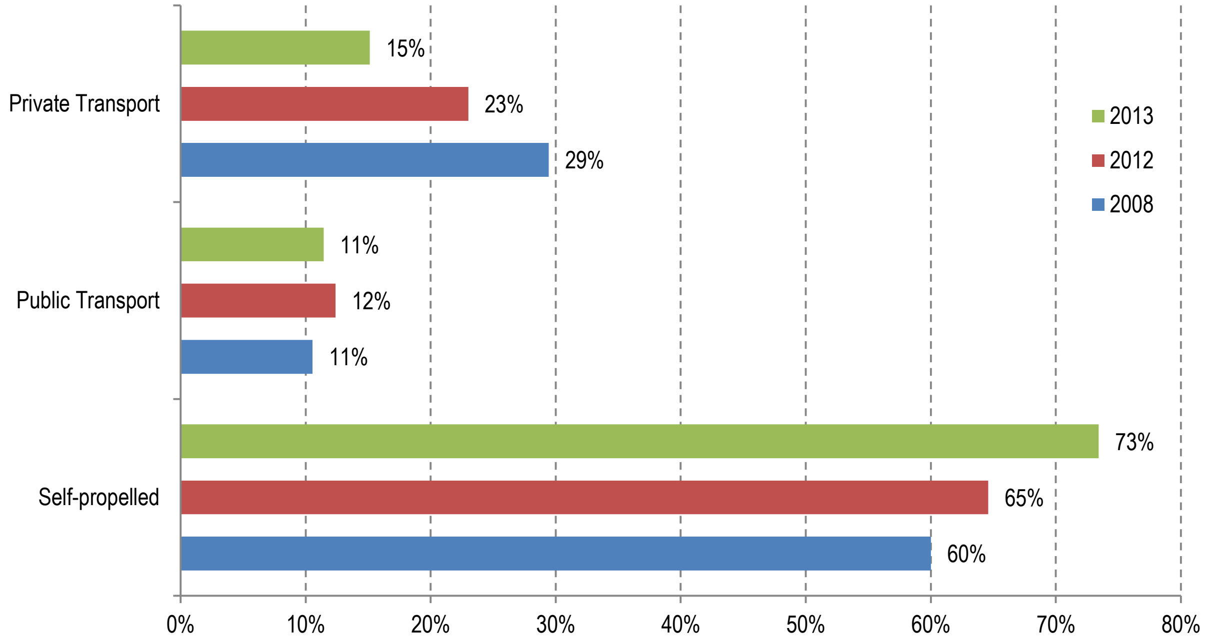
While the 2013 result may have been influenced by the higher proportion of younger residents captured within the sample, it may be that the promotion of cycling and walking as well as the installation of more bicycle lanes and measures to enhance pedestrian convenience such as scramble crossings, are providing a positive impact.

Another interesting consideration is the relatively low use of public transport in comparison to private transport. One would image that when travelling between two places within the City, traffic congestion and parking costs would provide significant disincentive. The rationale for this trend is likely determined by one of the following assumptions:

- Existing public transport routes and service is considered inconvenient, unreliable or time consuming in comparison to private transport; or
- Residents using private transport are travelling between the 'square mile' and North Adelaide.

It should also be noted that despite the proportional variance in how residents travel in the City, the overall use of all transport means will have likely increased. This is because the City's resident population grew significantly between 2008 and 2013.

Figure 10: Method of Travel (Residents)



Note[1]: Private transport includes personal vehicles such as cars and motorbikes. Self-propelled transport generally includes walking and cycling.
Note[2]: Figures have been subject to rebasing.

KEY INSIGHTS - CITY STUDENTS

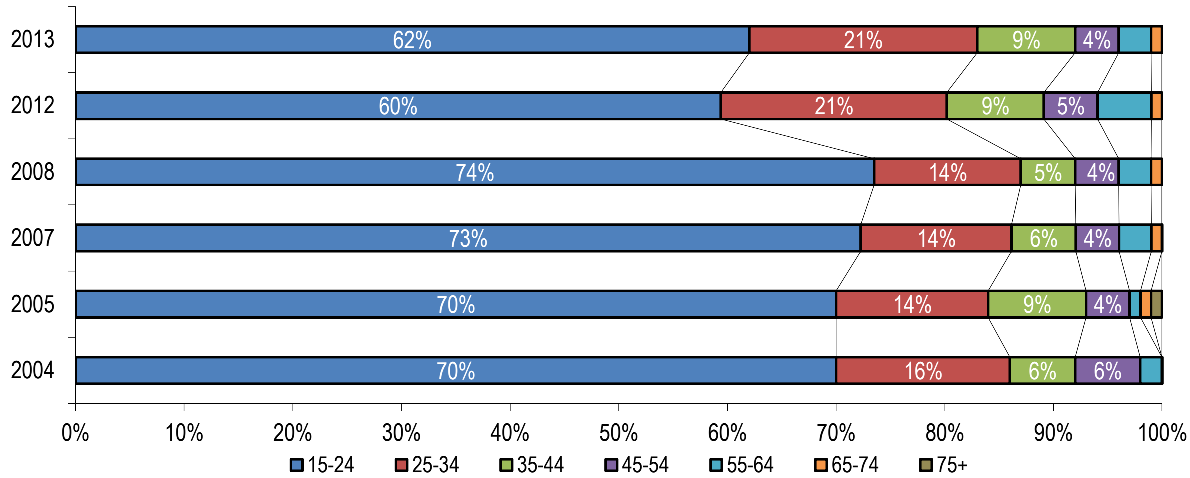
PROFILE SUMMARY

- There has been an increase in the proportion of student respondents from City postcodes over the past 10 years.
- The frequency of students visiting the City for study and shopping has shown a marginal positive trend since 2006.
- Visitation to parklands by students has fluctuated between 2005 and 2013.
- There has been a clear trend away from students coming from households with children to households without children over the past 10 years.

CITY STUDENTS

In 2013 the age groups of City students remained relatively stable. 15-24 year olds continue to account for the largest proportion (62%) down from a 74% peak in 2008 and balanced out by the significant increase in 25-34 year old students first identified in the 2012 survey (21% up from 14% in 2008) and continued in 2013.

Figure 11: Age Distribution (Students)



OCCUPATION

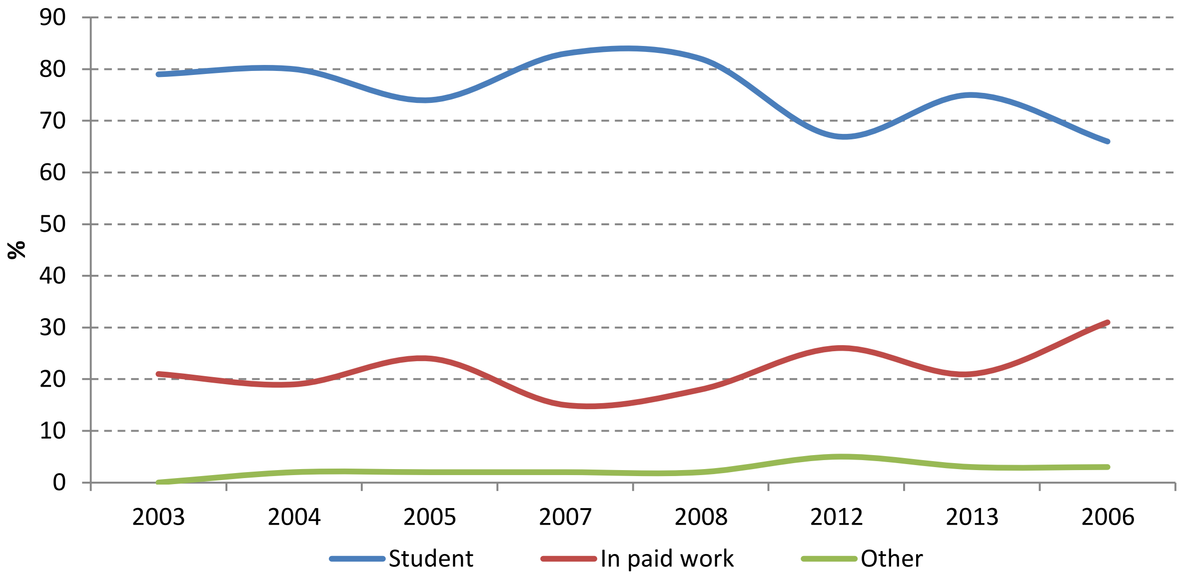
There are no clear trends evident in the primary occupation for student respondents over time (see Figure below). As might be expected, the majority of student respondents consistently cite studying are their primary occupation.

If significant trends were apparent, it would potentially indicate several demographic or economic factors, including:

- A shift to a larger proportion of mature aged students or part time students (potentially indicative by a larger proportion of respondents indicating that paid work is their primary occupation).
- Changes to the financial sustainability of students studying in the City (indicative by either increasing or decreasing proportions of respondents indicating that paid work is their primary occupation).

As there have been no clear trends, it seems that the financial situation and demographic profile of students studying in the City has not changed significantly over the past 10 years. The environment for studying in the City appears to be relatively stable, which is a positive for the City.

Figure 12: Occupation Distribution (Students)

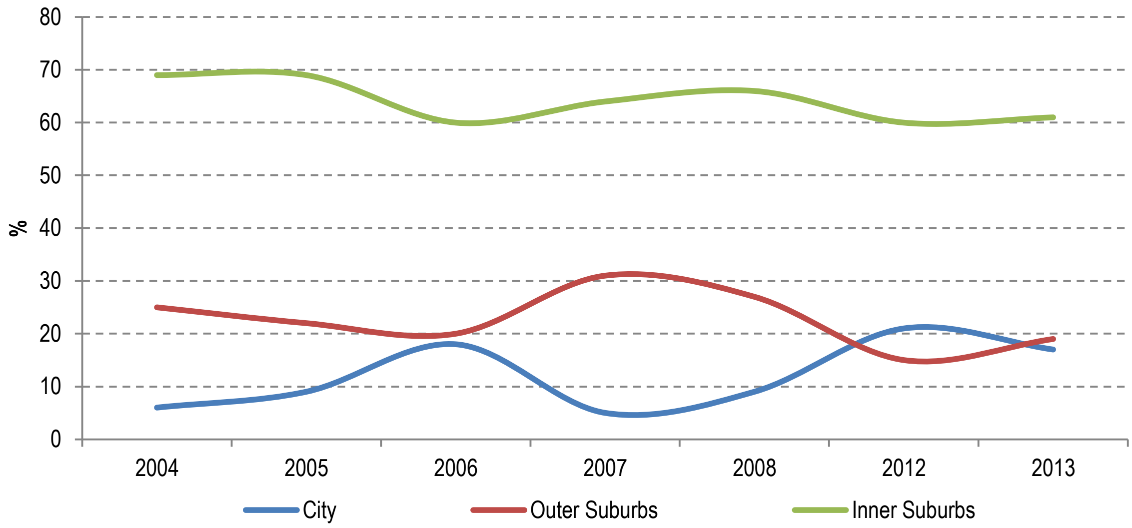


HOME POSTCODE

There has been an increase in the proportion of student respondents from City postcodes over the past 10 years. The proportion of students who live in the Adelaide City Council area has increased from 6% in 2004 to 17% in 2013. There have been relative decreases in the proportion of students from inner and outer suburbs. This may be related to the significant growth in dedicated student accommodation over that time.

Despite this trend, the inner suburbs are clearly the most popular area for students to reside, recording consistently above 60% between 2004 and 2013.

Figure 13: Home Postcode (Students)



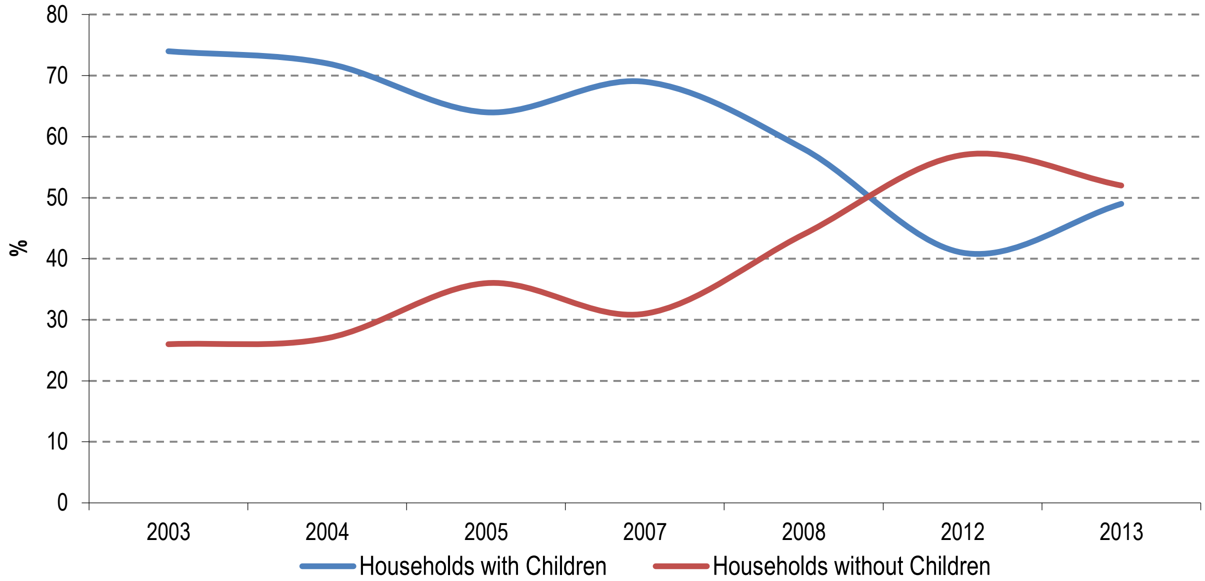
HOUSEHOLD COMPOSITION

There has been a clear trend away from households with children to households without children for student respondents over the past 10 years. This is demonstrated by an increase in the proportion of students from households without children from 26% in 2003 to 52% in 2013, which is coincided by an equal and opposite decline in the proportion of households with children over the same period. There are several likely explanations for this trend, including:

- Increases in the number (and proportion) of international students studying in the City, whose parents are living overseas.
- Increases in student accommodation available in the City and the propensity for students to be residing in group households

The Figure below considers the household type of students over time.

Figure 14: Household Composition Distribution (Students)

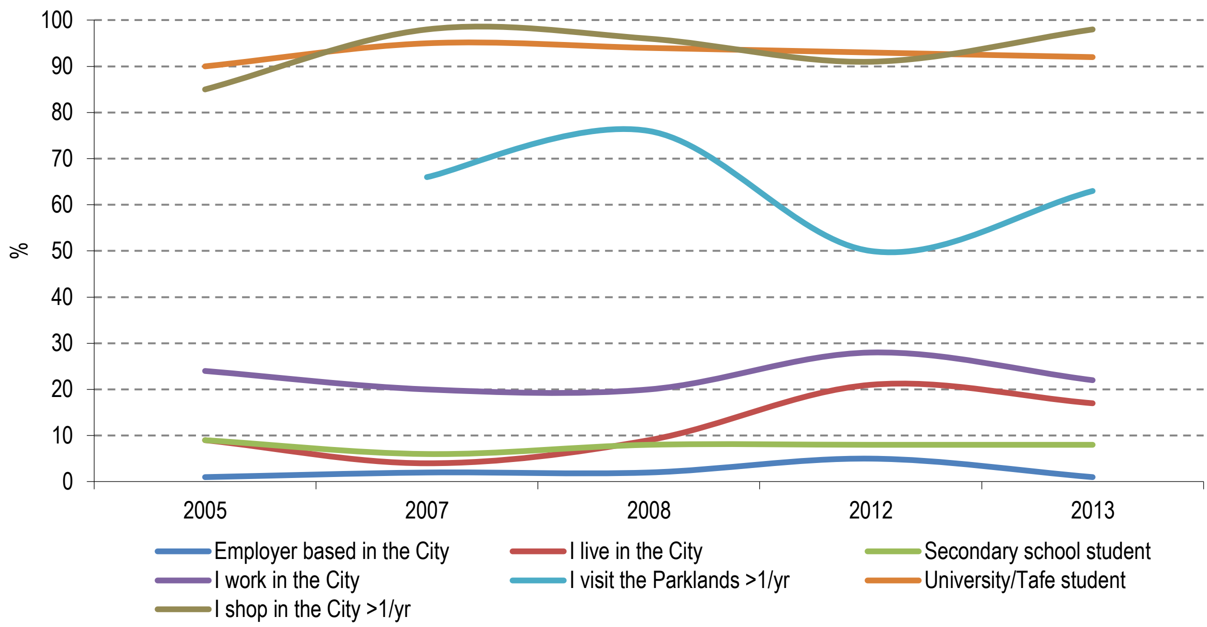


STUDENTS' CITY USAGE

Almost all students study and shop in the City, recording 92% and 98% respectively in 2013. The frequency of studying and shopping in the City has shown marginal but positive trends among student respondents since 2005. Visitation to parklands fluctuated between 2005 and 2013, recording a net decrease of 3 percentage points.

The percentage of students employed in the City has recorded consistently higher numbers than student residents, indicating that the City is a net exporter of employment for students.

Figure 15: City Usage (Students)



Note$_1$: Includes multiple responses
Note$_2$: The significant deviation in data noted between 2008 and 2012 is likely the result of differing X axis scaling.

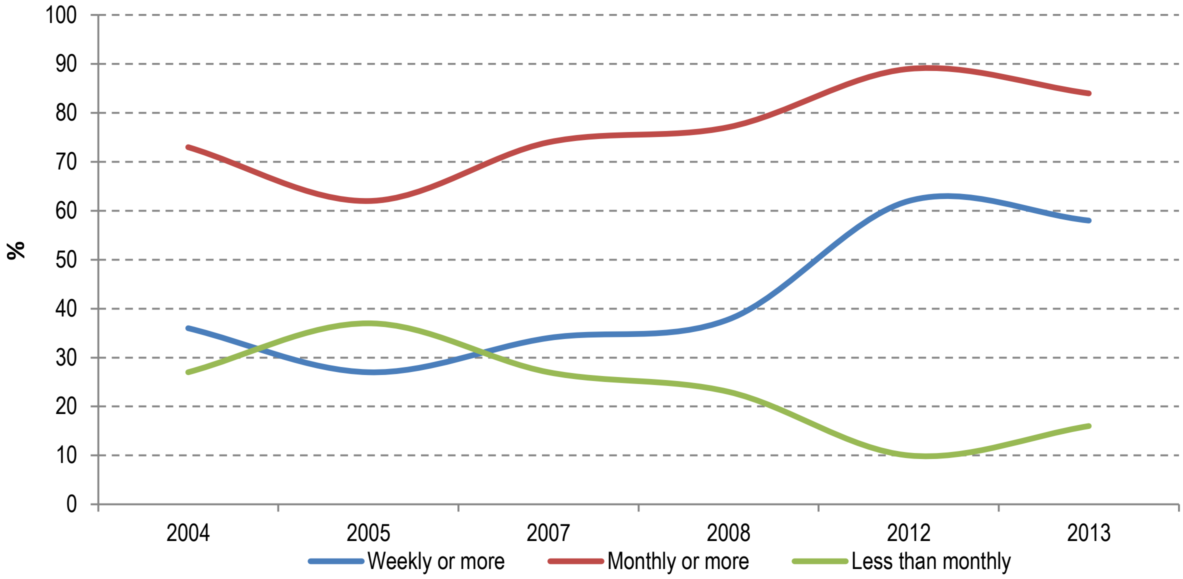
FREQUENCY OF BEING IN THE CITY FOR STUDY

The incidence of students being in the City daily for study has decreased from 85% of students in 2004 to 49% in 2013. This may be attributable to innovations such as the increasing availability of online learning materials, on line discussion groups, and remote access to lectures. These developments affect the way that students interact with their learning institutions and peers; including by reducing the need for students to attend campus daily.

FREQUENCY OF BEING IN THE CITY FOR SHOPPING

Student visitation to the City for shopping has increased significantly since 2004. The proportion students indicating they visit the City for shopping at least weekly or monthly has increased by 11 and 22 percentage points respectively. This has coincided with a decrease in the proportion of students shopping in the City less than monthly. The increase in shopping visits from students can potentially be attributed to increases in the proportion of students that reside in the City and also to the increasingly attractive and broad retail offer.

Figure 16: Shopping Visits (Students)



Note:[1] Series are aggregated and are placed under more than one aggregate group. As such, the series will not add to 100%.
Note[2]: The significant deviation in data noted between 2008 and 2012 is likely the result of differing X axis scaling.

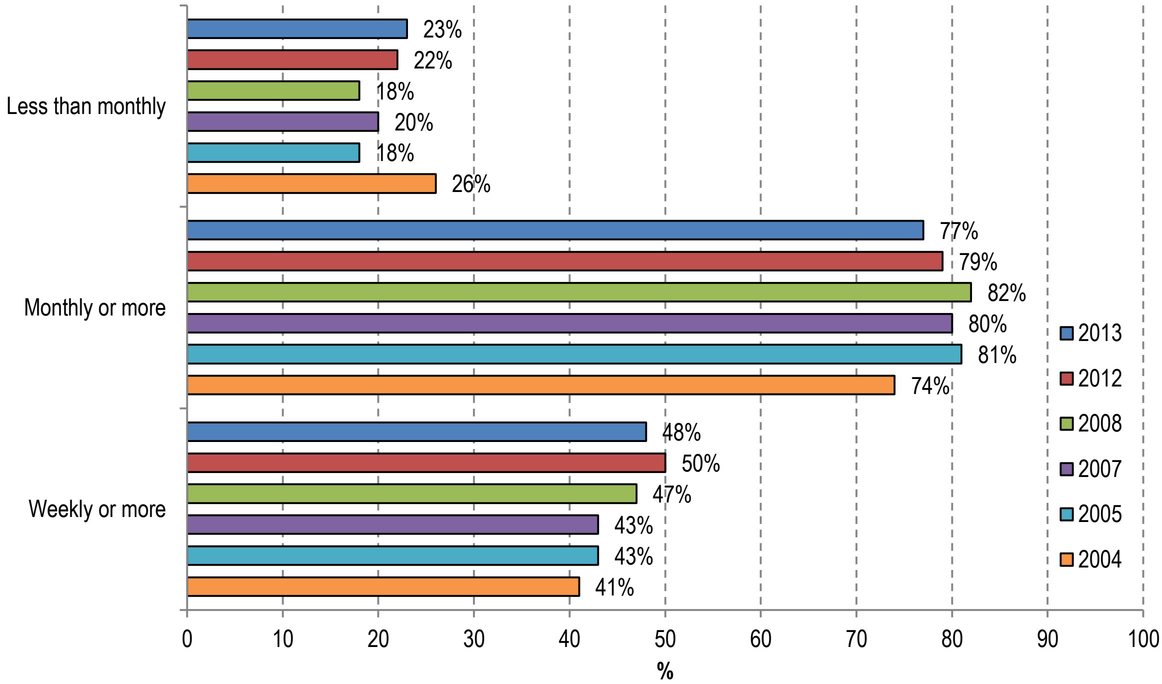
FREQUENCY OF BEING IN THE CITY FOR WORK

There has been a marginal increase in the proportion of students visiting the City for work purposes on at least a weekly basis (increasing from 21% in 2004 to 23% in 2013). However, the data has fluctuated significantly over the time period in which CUP data has been collected.

FREQUENCY OF BEING IN THE CITY FOR LEISURE OR ENTERTAINMENT

There has been a general increase in the frequency of visitation to the City for entertainment and leisure services by students (see Figure below). Students visiting the City at least once per week for leisure or entertainment has increased from 41% in 2004 to 48% in 2013. Similarly, students visiting the City more than once per month for leisure and entertainment has increased by 3 percentage points over the same period. Potential drivers for this include an increasingly broad range of entertainment options, the overall number and timing or events and activities, or to the increasing proportion of students in the 24-35 year age range who are more likely to have the financial means to engage in leisure or entertainment in the City.

Figure 17: Leisure and Entertainment Visits (Students)



Note: Series are aggregated and are placed under more than one aggregate group. As such, the series will not add to 100%.

KEY INSIGHTS - CITY WORKER S

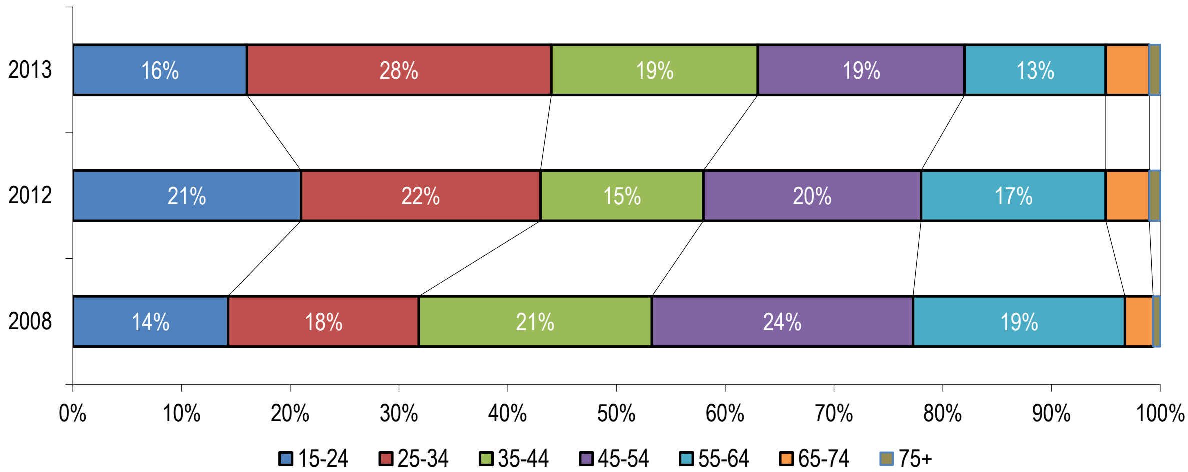
PROFILE SUMMARY

- Similar to residents, the age distribution of City workers has become significantly younger since 2008.
- The proportion of City workers living in households without children has increased from 49% in 2008 to 59% in 2013.
- There are a growing proportion of senior managers and professionals in the City's workforce.
- City usage among workers has been volatile since 2007, however has remained relatively high – particularly for shopping, other reasons (including dining, leisure and entertainment) and visiting the parklands.
- The frequency of City usage for shopping and other reasons has increased significantly since 2004, with weekly or more visitation rising by 26 percentage points and 20 percentage points respectively.

AGE

Similar to residents, the age distribution of City workers has become significantly younger since 2008. This trend is particularly apparent in those who recorded ages between 15 and 34, which has risen from 32% in 2008 to 44% in 2013. This may be related to employment growth in industries such as Administrative and Support Services, Accommodation and Food Services and Arts and Recreation Services, that are likely to attract younger/early career workers.

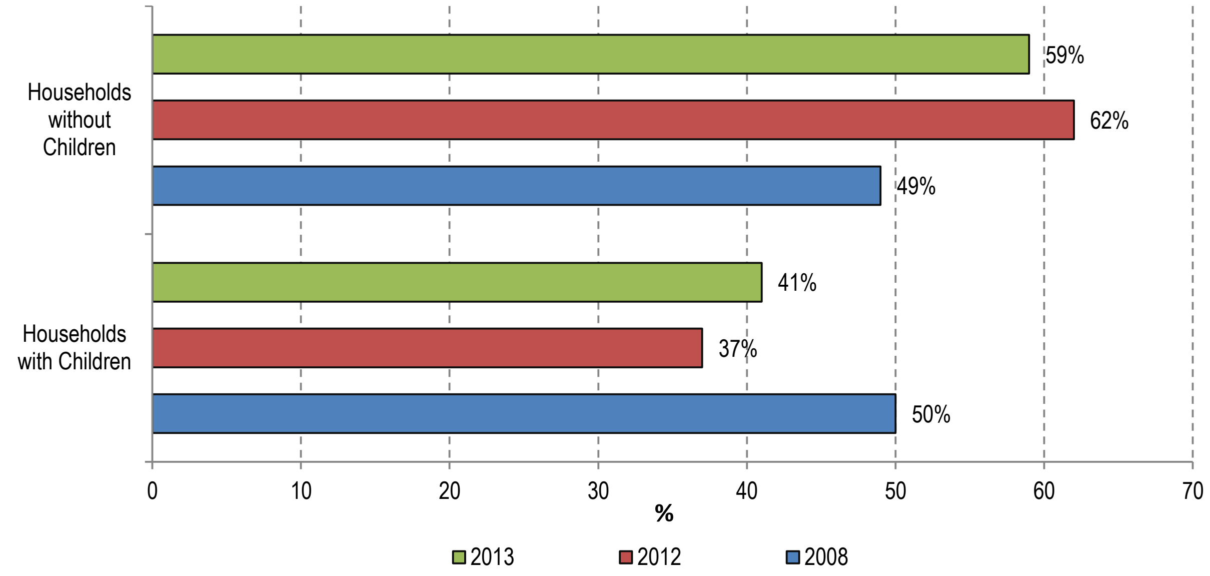
Figure 18: Age Distribution (Workers)



HOUSEHOLD COMPOSITION

The proportion of City workers living in households without children has risen from 49% in 2008 to 59% in 2013 (see Figure below). This corresponds with the reduction of age of City workers, who are more likely to live alone or in group households.

Figure 19: Household Composition Distribution (Workers)



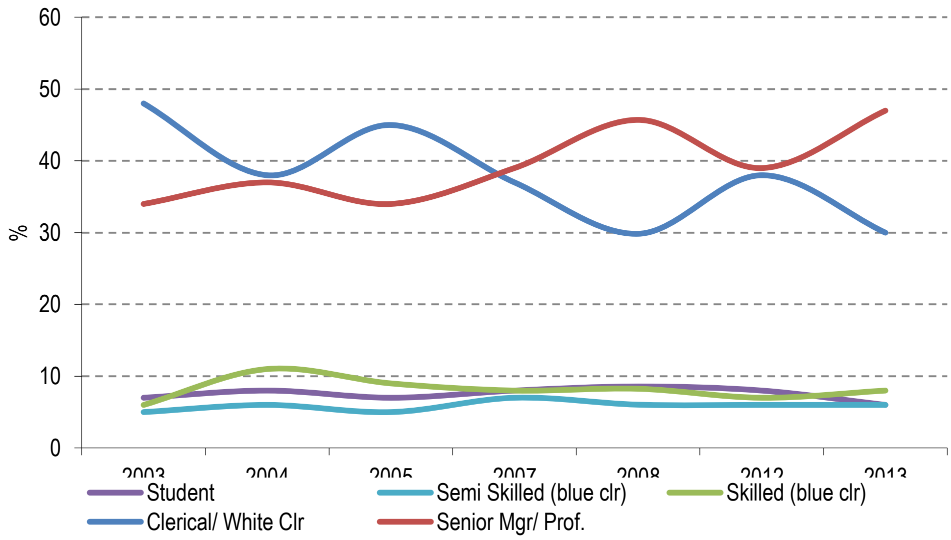
Note: Figures may not add to 100% due to statistical rounding.

OCCUPATION

There is a growing proportion of senior managers and professionals in the City's workforce (+13 percentage points over the past 10 years). This increase has been offset by a relative decrease in the proportion of clerical and white collar workers over the same period. All other major occupations have remained relatively static since 2003.

The trends observed in occupation distribution conflict with age distribution data collected, as senior management and professional occupations are generally occupied by older aged workers. It may be fair to assume a general 'up skilling' of all workers in the City, which is resulting in a higher number of professionals. The trend may also be a result of higher tertiary education rates amongst young people, providing them with a 'leg up' into junior professional positions, which were previously merited on experience. In addition, it is widely agreed that the Australia economy is transitioning from a resource and manufacturing based economy to a service based economy. The changes observed for occupation in the City may be a demonstration of this broader trend.

Figure 20: Occupation Distribution (Workers)



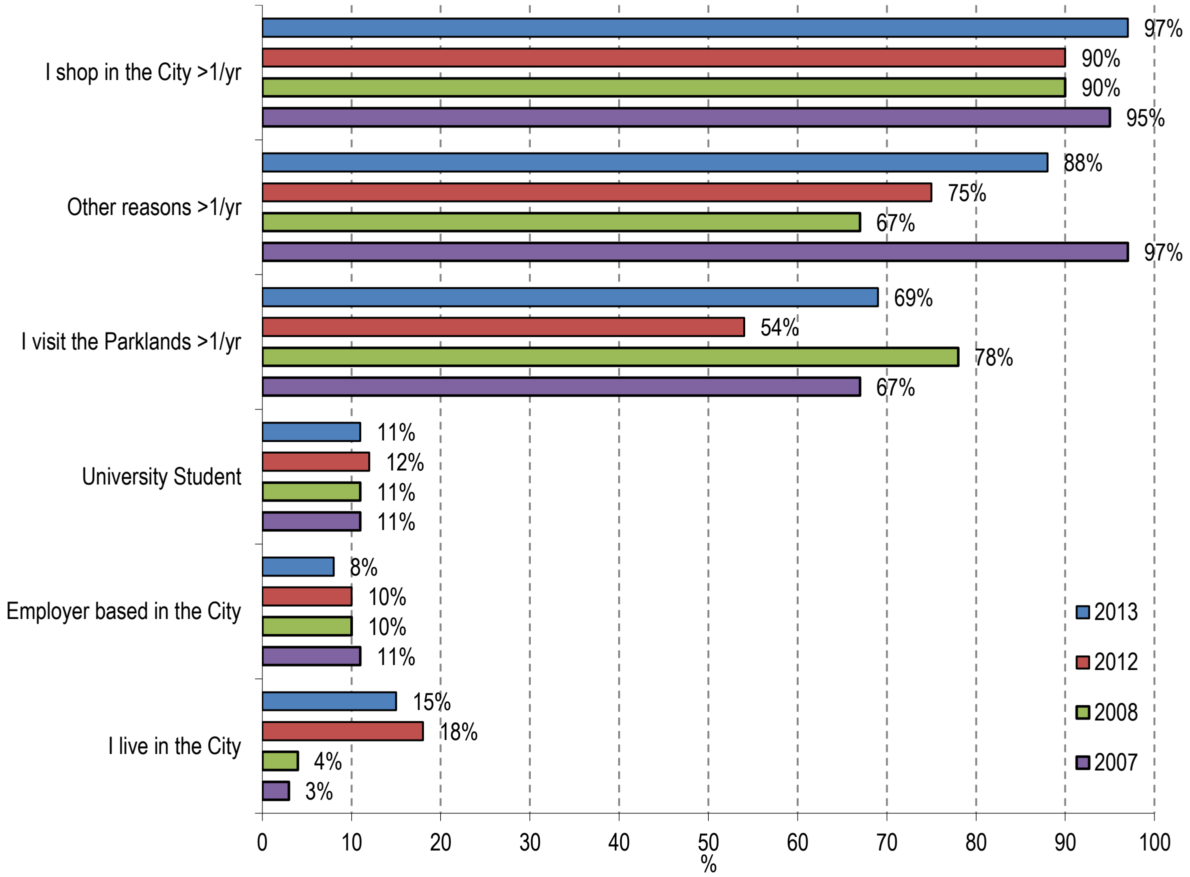
WORKERS' CITY USAGE

City usage among workers has been volatile for many activities between 2007 and 2013. The proportion of City workers that also shop in the City has been consistently high (above 90%) since 2007, which is understandable considering that workers are in the City almost every day and are likely to shop in their lunch breaks and / or after work. Usage for other reasons (including leisure and entertainment) and the parklands has fluctuated between 2007 and 2013, but remains high for both (88% and 69% respectively in 2013).

There is a relatively low proportion of workers that are working for employers that are based in the City. These figures provide evidence for the theory that Adelaide is an 'outpost' for many companies that are based interstate. Employers based in the City has also declined since 2007 (-3 percentage points).

The proportion of City workers that reside in the City has increased significantly since 2007, which corresponds with similar findings from the residents results and reflects high population growth in the City over the same period.

Figure 21: City Usage (Workers)

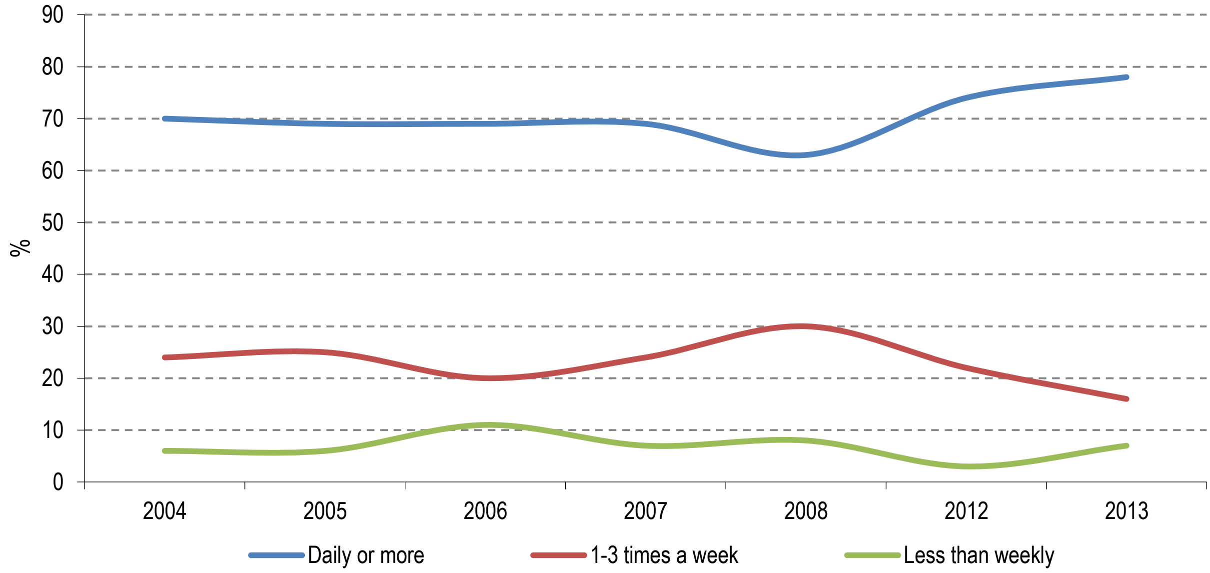


Note: Includes multiple responses

FREQUENCY OF BEING IN THE CITY FOR WORK

All of participants in the 'Workers Profile' are considered to be employed in the City, and as such, the proportion of respondents visiting on a frequent basis is high (see Figure below). Despite this observation, analysis of these statistics can determine trends in part time, full-time and underemployment in the City. It is fair to assume that daily or more visitation can be used a proxy for fulltime employment and less than daily visitation can be used to estimate part-time and casual employment arrangements. Daily or more visitation for work purposes has increased from 70% in 2004 to 78% in 2013. A corresponding decline in less than daily visitation has also occurred.

Figure 22: Worker Related Visits (Workers)

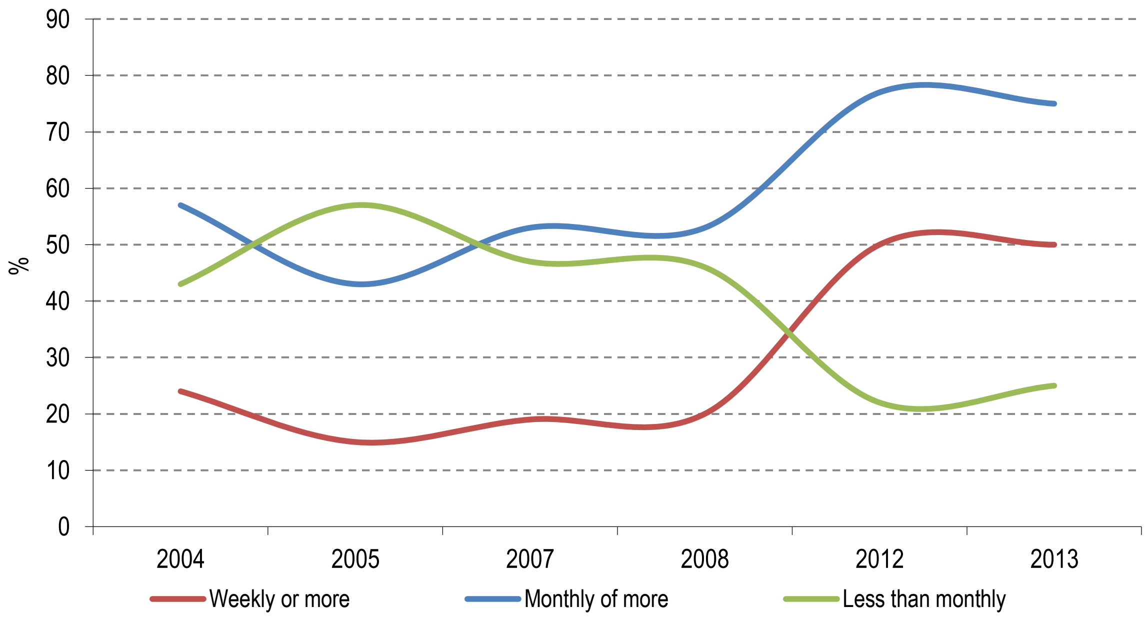


FREQUENCY OF BEING IN THE CITY FOR SHOPPING

There has been a significant increase in the frequency of shopping visits by City workers. Weekly or more use has increased from 24% in 2004 to 50% in 2013. Similarly, monthly or more use has increased from 57% to 75% over the same period. Two key changes in the City retail environment may be drivers of this change:

- Rundle Mall Precinct opening hours extension (7pm trading) that commenced inOctober 2010; and
- The deregulation of shopping hours allowing for Public Holiday trading in Rundle Mall from 26 January 2012

Figure 23: Shopping Visits (Workers)

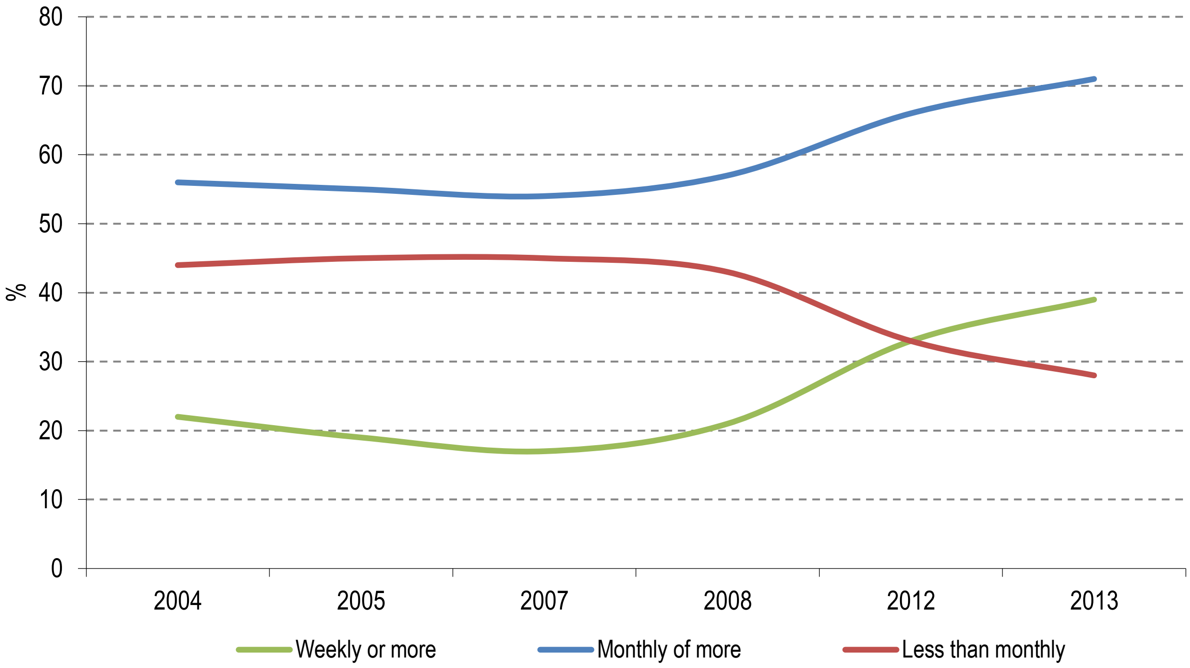


Note: The significant deviation in data noted between 2008 and 2012 is likely the result of differing X axis scaling.

FREQUENCY OF BEING IN THE CITY FOR LEISURE OR ENTERTAINMENT

There has been a significant increase in the proportion of City workers using the City for leisure and entertainment purposes on a weekly or more and monthly of more basis. Weekly or more use increased from 19% in 2004 to 39% in 2013 and monthly or more use rose from 55% to 71% over the same time period. This indicates that workers are taking advantage of the City's offer beyond their workplace and may indicate that the focus of evening activation of the City and events is appealing to City workers. City workers may be driving the increase in dining/entertainment as the main secondary use of the City.

Figure 24: Leisure and Entertainment Visits (Workers)



Note: The significant deviation in data noted between 2008 and 2012 is likely the result of differing X axis scaling.

KEY INSIGHTS - CITY VISITOR S

PROFILE SUMMARY

- City visitors are getting younger with more aged 15-34 years than previously.
- The number of City visitors who are from older couple with no children households has slowly decreased since 2007, while the proportion of visitors from young couple households with no children and group households has increased.
- City visitors are keen shoppers with around half visiting the City at least monthly for shopping.
- Leisure and entertainment visitors are quite polarised, with a growing proportion of visitors claiming they never visit the City for entertainment or leisure purposes and an increasing proportion saying they do so at least monthly.
- While City visitors were equally split between males and females in 2013, the longer term trend has been for more female visitors: 62% of City visitor respondents in 2005 and 2008.

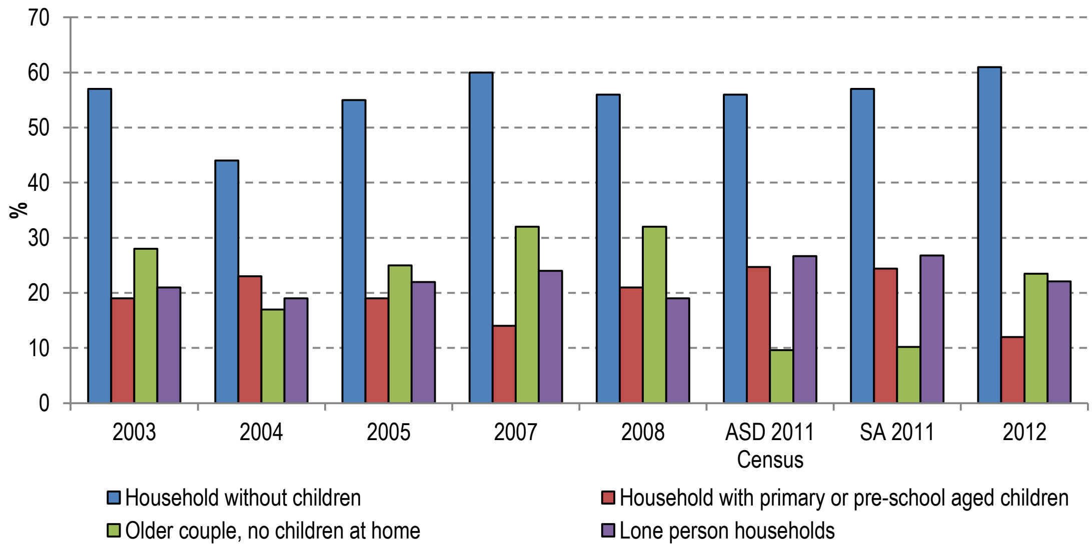
AGE DISTRIBUTION

Prior to 2012, the proportion of 15-34 year olds who were City visitors had been decreasing from 30% of visitor respondents in 2003 to 13% in 2008. In 2012, coinciding with a change in survey methodology from telephone sampling to on-street surveys, which were effected due to the decreasing use of landlines, the proportion of City visitors aged 15-34 years markedly increased to 33%. That level was maintained in 2013, and is likely to more accurately reflect the City visitor population.

HOUSEHOLD COMPOSITION

The majority of City visitors come from households without children in residence. Those from lone person households and older couples with no children at home continue to make up the largest proportion of City visitors. There are fewer City visitors from households with pre-school or primary school aged children, a consistent trend over time that may indicate that the City offer is lacking (or perceived to be lacking) for families with younger children. It may also be a reflection of suburban living where all day-to-day amenities and activities are located relatively nearby, obviating the need to visit the City.

Figure 25: Household Composition (Visitors)



(Note that the category "households without children" also includes older couples and lone person households and that the "Household with primary or pre-school aged children" proportions for SA and ASD are households with at least one child aged under 15)

POSTCODE

In 2013 half of all City visitors reside in the inner suburbs while the other half visits the City from the outer suburbs (21%), country SA and interstate or overseas (collectively 29%). These results are consistent with the 2012 results. Prior to 2012 the survey was conducted using a random sample of telephone numbers from the Adelaide metropolitan area: it did not capture non-metropolitan City visitors.

The data collected since 2012 is a better reflection of the origins of City visitors. It demonstrates the City's role as a hub for services, facilities and experiences for people from further afield.

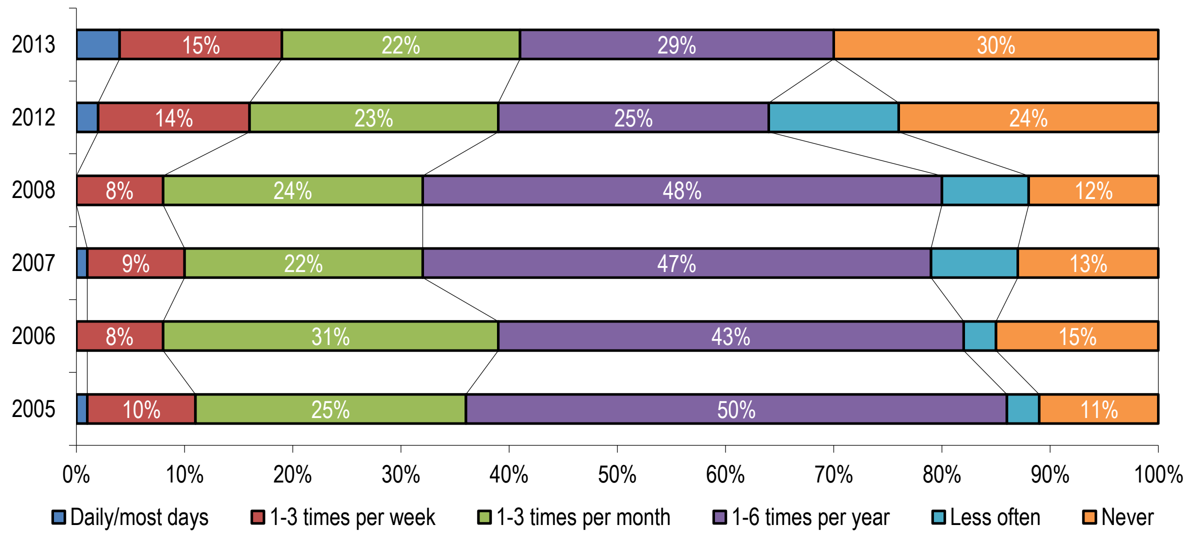
CITY USAGE AMONG CITY VISITORS

65% of City visitors visit the City at least once a month with a tendency for the primary purpose of the visit to be for shopping rather than leisure or entertainment.

City visitors are keen shoppers with more than half visiting the City at least monthly for shopping. Prior to 2012, the proportion fluctuated between 33% and 37%.

Interestingly, leisure and entertainment visitors are quite polarised, with a growing proportion of visitors claiming they never visit the City for entertainment or leisure purposes as well as more visiting for this purpose at least once per month. This has been the trend since 2007 and is especially evident in 2012 and 2013, coincident with a marked increase in the number of people aged 15-34 years visiting the City. People within that age range may be more attracted to the City's entertainment offer, especially the night time entertainment offer, influencing the frequency of City visits.

Figure 26: Leisure and Entertainment Visits (Visitors)



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