

HIGHLIGHTS

QUARTER FOUR

During this quarter, the City of Adelaide, along with other key stakeholders, hosted the second annual Australian Smart Cities Conference at the Adelaide Convention Centre. The conference brought together smart communities professionals from across Australia and the globe to share success stories and showcase smart solutions designed to help communities be more efficient, increase the capability of existing infrastructure and services, and improve the quality of life for citizens. Around 40 speakers were present at the event, which included panel discussions, workshops, demonstrations and walking tours.

SMART

A SMART CITY WITH A
GLOBALLY CONNECTED
AND OPPORTUNITY
RICH ECONOMY

CONTEXT

BROADER ENVIRONMENT

The number of South Australian businesses that export goods continues to grow, increasing by 8.6%, the highest rate in the nation. According to the Australian Bureau of Statistics (ABS) there were a total of 2,556 goods exporters in the state as at June 2016, which is 202 more exporters than the previous year. Manufacturing companies made up the largest proportion of goods exporters in the state, followed by wholesale trade companies.

There continues to be opportunity for the state in terms of services exports which increased by 14% in March 2017 compared to the same time last year. International education and tourism continue to present opportunities for growth with the lower Australian dollar and an increase in both the number of overseas student enrolments and international visitor numbers in March 2017 compared to March 2016.

On 22 June 2017, the State Government released the 2017-18 State Budget, which contained a number of incentives benefitting small businesses. These include a new payroll tax rate of 2.5% for businesses with payrolls between \$600,000 and \$1 million, expansion of the Job Accelerator Grant, and maintenance of the \$10 million Small Business Development Fund.

These announcements coincide with the release of the quarterly Sensis Business Index, which showed a slight drop in confidence in South Australian businesses in the March quarter 2017 compared to the December quarter 2016. According to the Sensis Business Index, the main concerns of small-to-medium businesses in the state were decreasing sales and lack of support from both Federal and State Governments.

BY 2020, OUR CITY'S ECONOMY WILL BE GROWING FASTER THAN THE AUSTRALIAN ECONOMY

BASELINE:

GRP growth 2.4% (Jun 2014)
GDP growth 2.5% (Jun 2014)

UPDATE ON OBJECTIVE:

GRP growth 3.4% (Jun 2016)
GDP growth 2.8% (Jun 2016)

NEXT UPDATE: May 2018

DIRECTION OF CHANGE

favourable variance

Between 2014-15 and 2015-16 the City's economy increased by 3.4% from \$18.0 billion to \$18.7 billion. In comparison, national GDP grew by 2.8% while Gross State Product (GSP) increased by 2.1% over the same period. The City's economic growth in the 12 months to June 2016 was double the growth rate of 1.6% experienced between June 2014 and June 2015. Higher rates of growth were also experienced at the state and national level compared to the previous period. This is consistent with the results from the January 2017 publications of the Sensis Business Index and the ANZ Stateometer, both of which identified improving economic conditions for South Australia.

Data source: National Institute of Economic and Industry Research (NIEIR) 2016, presented by economy.id

TOTAL BUSINESSES IN THE CITY WILL GROW FROM 5,000 TO OVER 5,300 AND WORKERS ON ANY GIVEN DAY FROM 89,000 TO 94,000 BY 2020

BASELINE:

89,000 workers daily (2014)
5,055 city businesses (2014)

UPDATE ON OBJECTIVE:

95,700 workers daily (2015)
5,196 city businesses (2016)

NEXT UPDATE: August 2017

DIRECTION OF CHANGE

favourable variance

According to the 2016 ACCLUE results, there were a total of 5,196 establishments (businesses and organisations) counted in the City and North Adelaide, representing a 2.8% increase from the 5,055 establishments counted in 2014. The largest growth was in the number of Accommodation and Food Services establishments (+112) while the largest decrease was in Administrative and Support Services (-136). Growth in the Accommodation and Food Services sector is partially explained by the opening of a number of new hotels between 2014 and 2016 as well as a general growth in the number of cafes and restaurants. In contrast, the decline in Administrative and Support Services reflects fewer businesses being involved in 'Office Administrative Services', 'Other Administrative Services n.e.c.' and 'Employment and Recruitment Services'.

Data sources: City of Adelaide Census of Land Use and Employment (ACCLUE) 2016; City of Adelaide City User Profile (CUP) Survey 2016; ABS, 'Regional Population Growth, Australia, 2014-15' (Cat. No. 3218.0)

WORKERS IN PROFESSIONAL AND TECHNICAL SERVICES, EDUCATION, FINANCE, TELECOMMUNICATIONS, CREATIVE AND MEDIA SECTORS WILL HAVE GROWN FROM 41,000 TO OVER 49,000

BASELINE:

40,700 workers in knowledge sectors (2014)

UPDATE ON OBJECTIVE:

35,650 workers in knowledge sectors (2016)

NEXT UPDATE: tba

DIRECTION OF CHANGE

unfavourable variance

The number of workers employed by knowledge sector establishments fell by 12% from 40,729 people to 35,650 and is due to a decline in employment across all the knowledge industries. The largest decrease was in the Professional, Scientific and Technical Services sector (-1,968) and the Information, Media and Telecommunications sector (-1,802). This is likely to be due to the reduction in the City based Telstra workforce and the reduction/amalgamation of Internet Service Providers (ISPs) since 2014.

Data source: City of Adelaide Census of Land Use and Employment (ACCLUE) 2016

BY 2020, THE NUMBER OF STUDENTS IN THE CITY ON ANY GIVEN DAY OF THE WEEK WILL INCREASE FROM 39,000 TO 41,000

BASELINE:

39,200 students daily (2014)

UPDATE ON OBJECTIVE:

46,700 students daily (2015)

NEXT UPDATE: August 2017

DIRECTION OF CHANGE

favourable variance

The estimated number of students in the City on any day increased significantly from the baseline figure to the 2015 update. The estimate is calculated from information about the main reason for being in the City coupled with frequency of visitation by the metropolitan Adelaide population. The simplicity of the current estimation method makes the estimates quite volatile. Administration is considering alternative means of estimating the number of students in the City on any given day to address the volatility.

Data sources: City of Adelaide City User Profile (CUP) Survey 2016; ABS, 'Regional Population Growth, Australia, 2014-15' (Cat. No. 3218.0)

HIGHLIGHTS

QUARTER FOUR

'The General Story' displayed at the Central Markets was launched by Deputy Lord Mayor Megan Hender and Climate Change Minister Ian Hunter during this quarter to educate the community about food waste. The display provides an innovative and interactive way to learn about food waste through a pantry shelf of virtual foods. These foods such as milk, bread and banana, come to life to tell the story of where they come from, how they were produced and why they often go to waste. After telling its story, the food item links the user via text message to a recipe of how the food can be used.

The display is delivered as part of the Carbon Neutral Adelaide initiative and is a demonstration of South Australian technological expertise. The objects are 3D printed through the Digital Fabrication at New Venture Institute at Flinders University and uses the latest interactive multimedia to play animated videos.

Approximately 5% of the City's greenhouse gas emissions come from waste and a major contributor of this is organic waste deposited in landfill. 'The General Story' is a joint initiative between the Adelaide Smart City Studio, OzHarvest, the Adelaide Central Market Authority and Carbon Neutral Adelaide.

GREEN

ONE OF THE
WORLD'S FIRST
CARBON NEUTRAL
CITIES AND AN
INTERNATIONAL
LEADER IN
ENVIRONMENTAL
CHANGE

CONTEXT

BROADER ENVIRONMENT

In June Australia's Chief Scientist, Dr Alan Finkel released the findings of a review into the future of the national electricity market (NEM). The Finkel Review was tasked with developing a 'blueprint' for the NEM that will deliver the benefits of future reliability, increased security, rewarding consumers, and lower emissions. These outcomes are achieved through three pillars – orderly transition measures, system planning and stronger governance. The report made 50 recommendations including the introduction of a Clean Energy Target to replace the current Renewable Energy Target, a requirement for existing large electricity generation companies to give three years' notice of closure, and the call for a new Energy Security Board.

The Clean Energy Council recently released their Clean Energy Australia Report 2016 which provides an overview of the Australian clean energy sector in 2016. According to the report, renewable energy provided 17.3% of Australia's electricity in 2016, the highest of any year in this century and is an improvement on the 14.6% in 2015. Hydro power accounted for the largest proportion of renewable energy generation (42.3%) followed by wind (30.8%) and small-scale solar PV (16%). In South Australia, renewable energy accounted for 48% of energy generation in the state in 2016 and is likely to increase to 50% with the closure of the state's last coal generator.

2016/17 CITY SCORECARD
QUARTER FOUR

CITY CARBON EMISSIONS WILL BE REDUCED BY 35% FROM THE 2006–07 BASELINE BY 2020

BASELINE:

1,175kt CO₂-e (2006-07)

UPDATE ON OBJECTIVE:

952 CO₂-e (2014-15)

NEXT UPDATE: August 2017

DIRECTION OF CHANGE

favourable variance

Most of the carbon emissions from the City are attributable to mains electricity use and transport. Emissions from electricity have decreased appreciably due to the greening of the grid from investment in renewable energy and high performing green buildings. City of Adelaide reports annually to CDP (the Carbon Project). Reporting to CDP takes in energy use by Council's operations and the sources of greenhouse gas (GHG) emissions and what we are doing to reduce them. The major sources of City of Adelaide emissions included in the GHG emissions inventory reported to CDP are those from buildings, municipal vehicle fleet, street lighting and traffic signals.

GREEN SPACE AND GREENERY IN THE BUILT-UP AREAS OF THE CITY WILL HAVE INCREASED BY 100,000 SQUARE METRES BY 2020

BASELINE:

1,241,777.11 (2015)

UPDATE ON OBJECTIVE:

not available

NEXT UPDATE: August 2017

DIRECTION OF CHANGE

not applicable

The baseline figure for green space and greenery comes from the Green Infrastructure Benchmark Data and Mapping Project undertaken in 2015. Total green coverage is calculated by adding the total pervious area (total area minus total impervious area) to the area tree canopy cover in built-up areas within the City. The built-up area of the City is the entirety of the City of Adelaide area minus the Park Lands. The upcoming Green City Plan will detail Council's contribution to increasing greenery across built-up areas in the City. As at end Quarter Four (4), 134 trees have been planted in new street locations and 125 replacement street trees planted.

Data source: City of Adelaide

BY 2020, AQUATIC NATIVE PLANTS ON THE TORRENS LAKE FLOOR WILL HAVE INCREASED FROM ALMOST ZERO TO 7,500 SQUARE METRES

BASELINE:

almost zero (2015)

UPDATE ON OBJECTIVE:

not available

NEXT UPDATE: August 2017

DIRECTION OF CHANGE

not applicable

The re-introduction of aquatic native plants to the Torrens Lake floor is an ongoing process with results likely to take some time to achieve and quantify. Planting commenced in Quarter Four (4). The first round of carp eradication was completed and harvested a total of 568 carp and 210 goldfish.

Data source: City of Adelaide

A DETAILED MEASURE OF REDUCTION IN KERBSIDE AND GENERAL WASTE WILL HAVE BEEN DEVELOPED AND INFLUENCES OUR WORK

BASELINE:

To be determined

UPDATE ON OBJECTIVE:

not available

NEXT UPDATE: tba

DIRECTION OF CHANGE

not applicable

General waste has increased marginally by one (1) percent to 4288.83 tonnes compared to 4232.09 tonnes over the same period in 2015/16.

Organic / Green Waste has increased 18% to 651.43 tonnes compared to 550.11 tonnes over the same period and recycled material has increased nine (9) percent in volume to 1879.41 tonnes compared to 1729.09 tonnes in the 2015/16 period.

Over this time period there has been a two (2) percent increase in diversion away from landfill.

Data source: City of Adelaide

A COMPREHENSIVE INTEGRATED WATER MANAGEMENT MEASURE WILL HAVE BEEN DEVELOPED AND INFLUENCES OUR WORK

BASELINE:

To be determined

UPDATE ON OBJECTIVE:

not available

NEXT UPDATE: tba

DIRECTION OF CHANGE

not applicable

The Biodiversity and Water Quality Action Plan review was completed and will inform the Integrated Water Management Plan and Integrated Water Management Measure. A water inventory has been developed for Council facilities including parks, gardens and property.

Data source: City of Adelaide

Data source: City of Adelaide

HIGHLIGHTS

QUARTER FOUR

This quarter saw the construction commence on Adelaide's tallest residential apartment development, Kodo. The 30-storey development includes over 200 apartments as well as retail and commercial tenancies and is expected to create around 250 local jobs.

On 27 June 2017, the Australian Bureau of Statistics released the results of the 2016 Census of Population and Housing. The first release of the latest Census data shows that Australia is a fast-changing, ever-expanding, culturally diverse nation.

At the City of Adelaide level, the Census shows that the proportion of residents aged over 65 years, in line with national trends, continues to increase and is now at 13%, compared to 11.2% in 2011. 'Young people' continue to dominate the City population with 42.2% of residents aged 15 to 29 years. The diversity of the City of Adelaide resident population is evidenced by an increase in the proportion of the residents who were born in China (up from 8.4% in 2011 to 13.1% in 2016) with a corresponding increase in Mandarin and Cantonese speakers. The proportion of households in which only English is spoken at home reduced from 58% to 52.8%.

Many households continue to comprise one person (41% of households) and more than half of all occupied private dwellings are flats or apartments (51.4%).

There has been a drop in median mortgage payments but an increase in median rent payments, indicating that 'housing stress' (where housing costs are higher than 30% of household income) for people paying mortgages may have reduced, but may have worsened for renters.

Additional Census information such as migration and employment will be released in October 2017.

LIVEABLE

A BEAUTIFUL, DIVERSE
CITY WITH AN
ENVIABLE LIFESTYLE
THAT IS WELCOMING
TO PEOPLE AT ALL
STAGES OF LIFE

CONTEXT

BROADER ENVIRONMENT

A State Planning Commission has been established with the introduction of the government's new planning system. Members of the Commission were appointed in May and include Mr Michael Lennon, Mr Matt Davis, Ms Janet Finlay, Ms Fairlie Delbridge and Mr Allan Homes. This group will be led by Chairperson of the Commission and former Supreme Court Justice Mr Tim Anderson QC.

Several initiatives were announced as part of the State Government's 2017-18 Budget to encourage City living. These include an extension of the off-the-plan stamp duty concession to 30 June 2018, the introduction of a \$10,000 pre-construction grant for eligible off-the-plan apartment contracts, and the introduction of a five-year land tax exemption for investors purchasing off-the-plan apartments. The State Government also introduced a 4% conveyancing duty surcharge for residential property purchases by foreign buyers and temporary residents by January 2018.

An upswing in development activity in the quarter saw 378 new apartments in three (3) large scale projects bought onto the market. A further six (6) projects commenced construction and will bring an additional 697 apartments and 274 student beds onto the market over the next 18 months to two (2) years.

2016/17 CITY SCORECARD
QUARTER FOUR

THE NUMBER OF PEOPLE LIVING IN THE CITY WILL HAVE GROWN FROM 23,000 TO 28,000 BY 2020

BASELINE:

22,690 (ERP, June 2014)

UPDATE ON OBJECTIVE:

23,615 (ERP, June 2016)

NEXT UPDATE: May 2018

DIRECTION OF CHANGE

favourable variance

On 30 March 2017, the Australian Bureau of Statistics (ABS) released new Estimated Resident Population (ERP) figures for Local Government Areas. The City of Adelaide's population is estimated at 23,615 people. This is 456 more than the 30 June 2015 estimate, and represents a rate of growth of 2.0% from 2015 to 2016. To reach the target of 28,000 residents by 2020 (four more years of data), the population needs to increase by nearly 1,100 people per year, or 4.4%

ADELAIDE WILL BE LISTED IN THE TOP THREE MOST LIVEABLE CITIES IN THE WORLD BY 2020

BASELINE:

Ranked 5th (EIU, 2015)

UPDATE ON OBJECTIVE:

Ranked 5th (EIU, 2016)

NEXT UPDATE: August 2017

DIRECTION OF CHANGE

no change

The Economist Intelligence Unit (EIU) released its 2016 rankings in August. Adelaide remains at the 5th most liveable city in the world, the position it has held since 2012. The list continues to be topped by Melbourne, Vienna, Vancouver and Toronto. Of the five (5) categories of liveability assessed by the EIU, Adelaide gets its lowest score (94.2/100) in the areas of culture and environment, which includes factors such as sporting availability, cultural availability and food and drink, and its highest score (a perfect 100) in the education and healthcare categories.

The EIU Liveability rankings relate to the entirety of Adelaide and not specifically to the City of Adelaide.

A NATION LEADING WELLBEING AND RESILIENCE MEASURE WILL BE APPLIED AND INFLUENCES OUR WORK

BASELINE:

PERMA+ score of 7.2 (September 2016)

UPDATE ON OBJECTIVE:

not available

NEXT UPDATE: tba

DIRECTION OF CHANGE

not applicable

A survey of residents was undertaken in 2016 in conjunction with the University of Adelaide and SAHMRI to establish the baseline. The survey tool used is the PERMA+ framework from the University of Pennsylvania. 484 residents took the online survey over a four (4) week period in May and June 2016.

Development of an Action Plan and consideration of a stretch target for the next four (4) years is underway.

HIGHLIGHTS QUARTER FOUR

Once again, Adelaide was mentioned as the place to go, this time by US magazine Vogue.

On the back of last year's lonely planet and trip.com must visit locations, internationally renowned fashion, style, travel and lifestyle publisher VOGUE listed Adelaide as one (1) of ten (10) places to travel, based on asking travel experts to share their favourite unexpected summer holiday destinations.

The South Australian Government announced that the Australian Tourism Exchange (ATE) will be held at the Adelaide Convention Centre in 2018. The Australian Tourism Exchange (ATE) is Australia's largest annual travel and tourism business-to-business event. It attracts thousands of tourism industry stakeholders from more than 30 countries around the world. It is a significant opportunity to showcase South Australia's food, beverage and tourism offerings to national and international leaders. Approximately 2,500 delegates are expected to attend.

CREATIVE

A MULTICULTURAL
CITY WITH A
PASSION TO CREATE
AUTHENTIC AND
INTERNATIONALLY
RENOWNED EXPERIENCES



2016/17 CITY SCORECARD
QUARTER FOUR

CONTEXT BROADER ENVIRONMENT

A survey released by the Australia Council for Arts shows increasing value and significance of arts to Australians. The third National Arts Participation Survey found that 98% of Australians engage with the arts, 97% listened to recorded music, 79% read books and 72% attended live arts events. The survey also found that:

- More Australians now believe that arts reflect Australia's cultural diversity and help to shape our identity
- 75% of Australians believe that arts is an important component of education
- 8 in 10 Australian engage with the arts online compared with 5 in 10 in 2009
- The 2016 National Arts Participation survey was conducted in November to December 2016 with a nationally representative sample of over 7,500 Australians aged 15 and over.

A number of new publications have been released by Tourism Research Australia during this quarter. This includes the State Tourism Satellite Accounts for 2015-16, and the March updates of the quarterly International Visitors' Survey (IVS) and the National Visitors' Survey (NVS). The State Tourism Satellite Accounts showed that the value of goods and services consumed by domestic and international visitors to Australia in 2015-16 totalled \$130 billion, an increase of 6% from the previous year. Most of this came from domestic visitors that is, Australians travelling locally. In South Australia, tourism consumption totalled \$8 billion, an increase of 3.2% over the previous year.

The IVS showed that in the year to March 2017, overseas visitor spent close to \$40 billion in Australia, an increase of 5% from the previous year. The main contributors to this spend were visitors from China, the US, the UK, New Zealand and Japan. For South Australia, overseas visitors spend totalled \$7.3 billion in the 12 months to March 2017, which is an increase of 8% from the previous year. Visitor numbers increased by 9% to 7.7 million across Australia and by 8% to 2.7 million in South Australia.

Similarly, spend by Australians travelling locally also grew in the year to March 2017. Total overnight spend was \$61.7 billion (+6%) nationally while in South Australia overnight spend was \$12.7 billion, 12% more than the previous year.

ATTENDANCE AT FESTIVALS AND EVENTS IN THE CITY AND PARK LANDS WILL HAVE GROWN BY 5% BY 2020

BASELINE:

Attendance figure average for 2013-14 and 2014-15: 5.62M

UPDATE ON OBJECTIVE:

not available

NEXT UPDATE: early 2018

DIRECTION OF CHANGE

not applicable

A baseline events attendance figure was calculated and released in Q2 (two). The figure includes events and festivals that the City of Adelaide sponsors or manages and other major events/activities such as Adelaide Oval attendances. A figure has been calculated for 2013/14 and for 2014/15 and then averaged. An average of two years is required to account for the included festivals that occur biennially (Adelaide Film Festival, Adelaide International Guitar festival, dreamBIG Children's Festival)

Data source: City of Adelaide

A DETAILED MEASURE OF THE NUMBER OF PEOPLE CREATING AND ACTIVELY PARTICIPATING IN ARTS AND CULTURAL ACTIVITIES WILL HAVE BEEN DEVELOPED AND INFLUENCES OUR WORK

BASELINE:

16% (2016)

UPDATE ON OBJECTIVE:

18% (2017)

NEXT UPDATE: August 2018

DIRECTION OF CHANGE

favourable variance

This measure was established to capture the level of active participation in arts and cultural activities in the City. The data is collected through the City of Adelaide's annual City User Profile (CUP) Survey, which asks City users (people who are in the City on the day of the survey) whether they had actively participated in any of a specified range of activities in the city in the preceding 12 months. These activities include creating music, participating in a theatre/dance/performance/event, parade or show, visual arts and craft and creative writing and is based on the Australian Council for the Arts definition of active participation. The results from the 2017 CUP survey found that the number of City users who actively participate in arts and cultural activities increased to 18% compared to 16% in 2016.

Data source: City of Adelaide City User Profile Survey 2017

BED NIGHTS SPENT IN ADELAIDE BY INTERNATIONAL AND DOMESTIC VISITORS WILL HAVE GROWN FROM 8.1 MILLION TO 9 MILLION BY 2020

BASELINE:

8.059M (June 2015)

UPDATE ON OBJECTIVE:

8.868M (year to Mar. 2017)

NEXT UPDATE: August 2017

DIRECTION OF CHANGE

favourable variance

In the 12 months to March 2017, there were 8.9 million visitor nights to the City, which is made up of 4.5 million domestic visitor nights and 4.4 million international visitor nights. Compared to the 12 months to March 2016, total visitor nights were 8.8% higher with most of this growth coming from domestic visitor nights.

During the March quarter 2017, there were a total of 3.1 million domestic and international visitor nights to the City, an increase from the previous quarter as well as the same time last year.

Data source: Tourism Research Australia unpublished data

PEOPLE WHO SAY THE CITY HAS GREAT PLACES TO ENJOY EVENTS, ACTIVITIES, ART AND CULTURE WILL HAVE GROWN FROM 8.4 TO 9 OUT OF 10 BY 2020

BASELINE:

8.4/10 (2015)

UPDATE ON OBJECTIVE:

8.4/10 (2017)

NEXT UPDATE: August 2018

DIRECTION OF CHANGE

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According to the 2017 results of the City User Profile Survey, the average rating out of 10 for this statement has remained the same as the baseline figure and is slightly higher than the 8.2 recorded in 2016.

Data source: City of Adelaide City User Profile Survey 2016

THE NUMBER OF PEOPLE THAT ARE VISITING THE CITY EACH DAY FOR SHOPPING, LEISURE OR ENTERTAINMENT WILL HAVE GROWN FROM 111,000 TO 117,000 BY 2020

BASELINE:

111,141 (2014)

UPDATE ON OBJECTIVE:

142,969 (2015)

NEXT UPDATE: August 2017

DIRECTION OF CHANGE

favourable variance

The number people visiting the City each day for purposes other than work or study has increased. The increase is mainly due to:

- the overall increase in the number of people visiting from Greater Adelaide
- the overall increase in the frequency of people visiting from Greater Adelaide (more of them are visiting the City more often than before), and
- an increase in the proportion of city users for whom the main purpose of visiting is not work or study.

The number of people coming to the City, their frequency of city use, and the proportion of city users by purpose will vary over time. We can expect the estimated number of people visiting the City each day for shopping, leisure or entertainment to vary depending on movement in the factors informing the calculation.

City of Adelaide City User Profile (CUP) Survey 2016; ABS, 'Regional Population Growth, Australia, 2014-15' (Cat. No. 3218.0)