

HIGHLIGHTS

QUARTER ONE

Council endorsed the next phase in developing our Ten Gigabit City Network which will transform the city and provide business to business and business to service connectivity at ultra-fast speeds and will be accessible across the CBD and North Adelaide.

We are also working closely with the NBN Co. to help plan the roll out of NBN services across our city.

The Smart Organisation Business Case was approved by Council and funding was released to enable 10 transformational customer and information-centred projects to commence.

SMART

A SMART CITY WITH A
GLOBALLY CONNECTED
AND OPPORTUNITY
RICH ECONOMY

CONTEXT

BROADER ENVIRONMENT

Key sectors across South Australia remain exposed to international competition and the relatively strong Australian dollar contributes to challenging economic conditions.

A Business Climate Survey of a sample of City businesses earlier this year demonstrated the relationship between the fortunes of individual businesses and perceptions of the overall health of the economy. 31% of respondents reported a decline in business profitability over the preceding twelve months with most citing rising business costs and lower consumer confidence.

Council has updated the estimated daily city user population figure on the basis of the latest available estimated resident population of Greater Adelaide and information on frequency of people coming to the city. This has resulted in significant increases in the estimated number of workers and students in the city.

The increase in estimated daily student numbers is also related to an overall increase in the number of student visa holders at the national level and an increase in student enrolments at City university campuses. In 2014-15, there were 374,564 student visa holders in Australia. By 2015-16, the number of student visa holders had increased to 401,423. Although state level enrolment data is not available for 2015-16, higher education statistics show that there has been an increase in student enrolments in the City (defined as enrolments at the University of South Australia, Adelaide University, private universities and non-university higher education institutions) from 65,652 in 2013-14 to 72,334 in 2014-15.

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 1.5% (Jun 2015)
GDP growth 2.3% (Jun 2015)

DIRECTION OF CHANGE

decrease

The City's economy rose from \$17.9b in 2013-14 to \$18.1b in 2014-15 bringing annual GRP growth to 1.5%. In comparison, national GDP grew by 2.3% while Gross State Product (GSP) increased by 1.9% over the same period.

A slowing of GRP growth is consistent with the low level of growth in the South Australian economy. Key sectors across the State remain exposed to international competition and face challenging economic conditions. The job market has also been weak with trend employment rates for South Australia sitting at 7.7% in June 2015.

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)
no update on businesses

DIRECTION OF CHANGE

increase

The estimated number of people that are in the City for work has increased. The estimate includes people employed by businesses outside of the City who come into the City for business.

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:

36,700 workers in knowledge sectors (2016, preliminary)

DIRECTION OF CHANGE

decrease

The number of people employed by City businesses in the knowledge sectors saw an overall decline of 9.8% with each of the sectors individually experiencing a decline of between 3.3% and 34%.

The largest losses were in Information, Media and Telecommunications (-1,482 employees) driven by employment reductions by major communications providers and ISPs, and in Professional, Scientific and Technical services (-934 employees) due to employment reductions in engineering services and legal services.

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)

DIRECTION OF CHANGE

increase

The estimated number of students in the City on any day increased significantly. 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 increase in daily student numbers can be attributed to a number of factors including a general increase of the daily user population, larger number of student enrolments at city campuses and an increase in the number of international students across Australia.

HIGHLIGHTS

QUARTER ONE

In July 2016, Adelaide was announced as a member of the Carbon Neutral Cities Alliance (CNCA) joining 19 other cities across the globe taking transformational change in relation to carbon emission reductions. The CNCA is a collaboration of international cities committed to achieving long-term carbon reduction goals. Members of the CNCA are committed to cutting emissions by 80% to 100% by 2050. The CNCA aims to address what it will take for leading international cities to achieve these deep emissions reductions and how they can work together to meet their respective goals more efficiently and effectively.

GREEN

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

CONTEXT

BROADER ENVIRONMENT

In August 2016 the State Government released a draft Update on the 30 Year Plan for Greater Adelaide. Strengthening urban planning's role in reducing Greater Adelaide's greenhouse gas emissions by improving energy efficiency and design in buildings, and equipping the community to cope with the impacts of climate change, is a feature of the Update. The Update recognises the commitment of the State Government and the Council to making Adelaide the world's first carbon neutral city.

Our carbon neutral aspiration and activity is taking place in an internationally visible context with the State Government and Council signing parallel international agreements on climate change – the Compact of States and Regions and the Compact of Mayors. It is also guided by Carbon Neutral Adelaide: A shared vision for the world's first carbon neutral city, an agreement between the Council and the State Government released in November 2015, which outlines the following six areas of focus for implementation:

1. Building partnerships and encouraging community action
2. Investing in energy efficiency and renewables in the city
3. Transforming the way we travel
4. Reducing emissions from waste
5. Investing in large scale renewables across the state
6. Identifying offset opportunities to reduce emissions and deliver economic return.

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)

DIRECTION OF CHANGE
decrease of 19%

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.

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:
n/a

DIRECTION OF CHANGE
n/a

81 trees were planted in the CBD during the quarter and 181 in all across the City and Park Lands. What that means in terms of square meterage of green cover will be assessed and reported in a future quarter.

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:
n/a

DIRECTION OF CHANGE
n/a

Macrophyte revegetation plan for the Torrens has been prepared. Nursery and in lake trials have commenced. Seventeen species were identified as suitable for the conditions, but only two species survived the trials. 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.

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:
n/a

DIRECTION OF CHANGE
n/a

Council currently tracks kerbside waste and the proportion of recyclables. The scope of a suitable measure for kerbside and general waste reduction is being considered.

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

BASELINE:
To be determined

UPDATE ON OBJECTIVE:
n/a

DIRECTION OF CHANGE
n/a

Council currently tracks mains water use, recycled water use and the cost of both. The scope of an integrated water management measure is being considered.

HIGHLIGHTS

QUARTER ONE

Development of a Wellbeing measure using the PERMA+ - Positive emotion, Engagement, Relationships, Meaning and Accomplishment, with the + encompassing social connections, physical activity, nutrition and sleep. Council's measure was announced during the 5th National Positive Psychology Conference held in Adelaide in September.

LIVEABLE

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

CONTEXT

BROADER ENVIRONMENT

While the City's latest population growth figures still exceed that of South Australia, annual growth is at its lowest since 2011. Between 2013-14 and 2014-15, the population of the City grew by 2.1% from 22,689 to 23,169 people while state population growth increased by 0.8% over the same period. The dip in population growth could be due to a number of population drivers at the state level such as lower net overseas migration and higher levels of net interstate migration.

The Population Growth Research being undertaken with the Capital City Committee is nearing completion. More than 2000 surveys were conducted by phone and online with current and potential residents of the City to understand the drivers for city living, attitudes to apartment living, brand associations and expectations of both a residence and a residential location. Surveying was complemented by focus groups, business to business surveys and desktop analysis. The findings of the research will be applied to future targeted marketing efforts promoting the City of Adelaide to the people most likely to choose Adelaide to live.

In August 2016 the State Government released a draft Update to the 30 Year Plan for Greater Adelaide. The 30 Year Plan outlines the State Government's direction for land use change and development in Greater Adelaide. The Update continues the emphasis on building the CBD as an exemplary urban form with increased mixed use and residential development and with the Park Lands as the new recreational space and meeting places for locals and visitors. There is an emphasis on the quality of our public open spaces and streets which will be walking and cycling friendly, together with new tram networks that will connect the City to the suburbs. All of these factors are important in creating and sustaining a liveable city.

2016/17 CITY SCORECARD
QUARTER ONE

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:

23,169 (ERP, June 2015)

DIRECTION OF CHANGE

increase

Growth of the residential population is influenced by many factors including demand for city living and the availability of housing stock. Two major residential projects in the Adelaide CBD were completed in the first half of 2016 yielding 393 new dwellings. Based on 1.8 to 1.9 persons per dwelling, the new dwelling stock has the potential to accommodate between 707 and 747 new residents. The next ERP for the City of Adelaide will be released by the ABS in April 2017.

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)

DIRECTION OF CHANGE

no change

The Economist Intelligence Unit (EIU) released its 2016 rankings in August. Adelaide remains 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 categories of liveability assessed by the EIU, Adelaide gets its lowest score (94.2/100) in the area 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 category.

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:

N/A

DIRECTION OF CHANGE

N/A

Survey of residents undertaken 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 week period in May and June 2016.

Development of an Action Plan and consideration of a stretch target for the next four years is underway and will be presented to Council in early 2017 for consideration.

HIGHLIGHTS

QUARTER ONE

Adelaide has officially partnered with the world's biggest festival city, Edinburgh, with several agreements signed between organisations to strengthen cultural ties between the two cities.

Establishment of a baseline for the number of people creating and actively participating in arts and cultural activities in the City from which future change can be influenced and tracked.

CREATIVE

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

CONTEXT

BROADER ENVIRONMENT

Adelaide's reputation as Australia's best festival city continues to grow. Adelaide leads the nation in festivals attendance with 56% of all festival tickets sold in Australia in 2014 sold in Adelaide.

Adelaide will host the International Festival Cities Network in March 2017 and a prestigious national theatre forum as a centrepiece of the OzAsia Festival in October 2017. The forum will bring together more than 400 performing arts leaders to generate discussion around contemporary practice, policy, sustainability and presentation and to stimulate new ideas.

In August 2016, the State Government announced plans for major reforms of live music regulations to help make it easier for venues to host live music. These reforms relate to Adelaide's designation as a UNESCO City of Music in December 2015. Small Venue Licence holders are already permitted to host live music within the standard hours of trade without separate approvals.

Small venues have taken off in the CBD. Aside from the visible vibrancy impacts on the City, an economic study in 2015 found that Adelaide's small bars employed more than 400 people and generated \$49.3 million in economic activity. Many venues are owned/operated by people aged under 30.

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

BASELINE:
To be determined

UPDATE ON OBJECTIVE:
not available

DIRECTION OF CHANGE
N/A

Consideration of the scope of events in the City and Park Lands to be included in this measure continues.

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:
next available July/August 2017

DIRECTION OF CHANGE
N/A

The baseline was established from responses to questions in the 2016 City User Profile (CUP) survey about active participation in any of a specified range of activities in the city in the preceding 12 months. The specified activities include creating music, participating in a theatre/dance/performance/event, parade or show, visual arts and craft and creative writing. These categories are based on the Australian Council for the Arts definition of participation. The results of CUP show that 16% of city users participated in at least one of these activities in the 12 months prior to survey.

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:
8.272m (June 2016)

DIRECTION OF CHANGE
increase

In the year to June 2016, there were a total of 8.272 million visitor nights spent in Adelaide and North Adelaide, a 2.6% increase from the previous year. International visitor nights in the City increased by 1.1% from 4.22 million to 4.27 million. During 2016, international visitor nights spent in Adelaide accounted for 53.6% of visitor nights in the Adelaide Tourism Region and 44.4% of the state total. In comparison, growth in international visitor nights was 7.8% for Adelaide TR and 7.0% for South Australia.

Domestic visitor nights rose from 3.84 million to 4 million or by 4.3%. Domestic visitor nights in the City accounted for 47.2% of domestic visitor nights in the Adelaide Tourism Region and 18.3% of the state total. While domestic visitor nights growth for the City was similar to the state (4.0%), it was significantly lower than the growth achieved by the Adelaide Tourism Region of 12.4%.

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:
8.2/10 (2016)

DIRECTION OF CHANGE
decrease

The average rating decreased slightly from the 2015 baseline of 8.4/10 to 8.2/10 in 2016. The slight decrease is mainly due to a large decrease in the number of people who gave a rating of 10/10. In 2015, 23% of respondents gave 10/10; in 2016 11% did so.

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 (2015)

UPDATE ON OBJECTIVE:
142,969 (2016)

DIRECTION OF CHANGE
increase

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 both 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 the proportion of city users who visit for non-work or study purposes.

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 fluctuate, depending on movement in the three factors informing the calculation.