

## HIGHLIGHTS

### QUARTER TWO

In 2016 the Australian Government commenced the process of signing "City Deals" as part of its Smart Cities Plan. The purpose of a City Deal is economic growth with governments, industry and communities developing collective plans for growth and committing to the actions, investments, reforms and governance needed to implement them.

Cities, or parts of cities, will be selected through consultation with state and territory governments, prioritising areas where the opportunities are greatest.

The Australian Government has committed to a City Deal for Townsville, Launceston and Western Sydney.

In Quarter Two (2), Council continued to closely collaborate with the SA Government to create an overarching brand and governance model for the Gigabit City and the Ten Gigabit City projects. Preparation of information for an Expression of Interest commenced as did consultation with external businesses and stakeholders to assist with demand assessment.

# SMART

## A SMART CITY WITH A GLOBALLY CONNECTED AND OPPORTUNITY RICH ECONOMY

## CONTEXT

### BROADER ENVIRONMENT

General economic conditions continued to be slow during this quarter as shown by the fall in business confidence as reported in the September publication of the Business SA-Statewide Super Survey of Business Expectations. Only 16.3% of the businesses surveyed shared the opinion that the South Australian economy would perform more strongly over the coming twelve (12) months compared to 28.6% in the previous quarter. It appears that the weakening of national economic growth as well as the uncertainty around global developments such as 'Brexit' and the results of the United States' presidential election continues to place downward pressures on businesses across the City.

In December 2016, the Federal Assistant Minister for Cities, Angus Taylor, announced that a new National Cities Performance Framework would be developed in 2017, to assist the Federal Government to target smart cities policy and allow the public to see how cities were progressing. Measuring progress on key indicators – population growth, land use, society, the economy and the environment – is seen as an important way to improve the performance of cities. The benchmarking of cities exercise will involve working with stakeholders to define a set of meaningful indicators that will be published. Council will be involved in the exercise through the Council of Capital City Lord Mayors (CCCLM) .

The construction of a new city high school commenced during the quarter and will open by 2019. The new high school is located on Frome Road and will cater for 1,250 students with an emphasis on STEM (science, technology, engineering and mathematics) and health studies. The new school will broaden the diversity of the students that are in the City and will boost the number of students that are in the City on any given day.

**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)

**NEXT UPDATE:** May 2017

**DIRECTION OF CHANGE**

unfavourable variance

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)  
5,196 city businesses (2016)

**NEXT UPDATE:** August 2017

**DIRECTION OF CHANGE**

favourable variance

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.

The 2016 Adelaide City Census of Land Use and Employment (ACCLUE) counted 5,196 establishments (businesses and organisations) 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' and 'Employment and Recruitment Services'.

**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.

**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. 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 TWO

In November 2016, the Government of South Australia together with the City of Adelaide released the Carbon Neutral Adelaide Action Plan 2016-2021. The Plan projects a 65% reduction in emissions from the CBD and North Adelaide by 2025 through actions such as phasing out conventional fossil-fueled buses within ten (10) years, doubling the amount of cycling trips by 2020, increasing public transport use, and decarbonising the state's electricity supply by 2050.

The Action Plan highlights the importance of partnerships between government, community and individuals to achieve the rapid reduction of emissions by 2025. The Plan also identifies the pathways by which the carbon neutral goal will be achieved including:

- Energy efficient buildings, infrastructure and streetscapes
- Zero emissions transport
- Working towards 100% renewable energy
- Reducing emissions from waste and water
- Offsetting carbon emissions

# GREEN

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

2016/17 CITY SCORECARD  
**QUARTER TWO**

## CONTEXT

### BROADER ENVIRONMENT

The Government of South Australia is consulting on a draft Waste and Resource Recovery Infrastructure Plan. The City of Adelaide provided feedback reflecting existing policies and endorsed positions of Council.

In December 2016, the Government of South Australia announced the Energy Productivity Program. \$31M in funding over two (2) years is available to help businesses that use more than 160MWh of electricity annually to implement energy saving measures. This includes energy audits of facilities to determine where efficiencies can be made and to recommend technology or infrastructure upgrades to reduce energy use. Grants will be available to implement those recommendations. Funded projects could include solar arrays with battery storage units, Power Factor Correction equipment, and the replacement of existing pumps, compressors and refrigeration with more energy efficient technologies.

In October 2016, the Council of Australian Governments (COAG) Energy Ministers agreed to an independent review of the national electricity market to assess its current security and reliability and to provide advice to governments on a coordinated, national reform blueprint. In December 2016, the Independent review of the National Electricity Market – Preliminary Report, led by Chief Scientist Dr Alan Finkel, was released for public comment.

On 30 November 2016 the Federal Department of the Environment and Energy released the new National Carbon Offset Standards (NCOS) for Buildings and Precincts for public comment. The Standards set rules for measuring, reducing, offsetting and reporting emissions required to make voluntary carbon neutral claims for building and precinct operations. The Precinct standard is likely to form the basis for a new NCOS for cities that would guide future carbon inventories for the City of Adelaide.

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

**BASELINE:**  
1,175kt CO<sub>2</sub>-e (2006-07)

**UPDATE ON OBJECTIVE:**  
952 CO<sub>2</sub>-e (2014-15)

**NEXT UPDATE:** May 2017

**DIRECTION OF CHANGE**  
favourable variance  
(19% reduction)

In November 2016, Council reported on emissions reduction progress for Council's own operations in 2014/15 and the City of Adelaide community inventory in 2012/13 through the Global Covenant of Mayors for Climate and Energy.

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:**  
not available

**NEXT UPDATE:** tba

**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 of tree canopy cover in built-up areas within the city. The built-up area of the City is the entirety of the Council area minus the Park Lands.

68 trees have been planted in the built up areas of the City as at the end of Quarter Two (2). Each tree will have a canopy of five (5) to seven (7) square meters.

**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:** tba

**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. Due to extreme and adverse weather conditions planting did not commence in Quarter Two (2).

**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

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. In the meantime, Council has seen a reduction in waste going to landfill over the first six (6) months of 2016/17. General waste has decreased to 2,113.62 tonnes compared to 2,176.08 tonnes over the same period in 2015/16. This result is very positive considering the additional waste services now provided to a number of medium to high density dwellings.

Organic / Green Waste has increased to 324.79 tonnes compared to 266.06 tonnes over the same period and recycled material has increased in volume to 1005.83 tonnes compared to 859.52 tonnes in the 2015/16 period.

**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

Council currently tracks mains water use, recycled water use and the cost of both. In Quarter Two (2), Council commenced a review of the Water Quality part of the Biodiversity and Water Quality Action Plan and Water Security Action Plan. This will help to inform and develop the Integrated Water Management Plan and Integrated Water Management Measure.



## HIGHLIGHTS

### QUARTER TWO

Four (4) significant developments received approval in the period October-December 2016. One (1) on Hurtle Square and one (1) on Austin Street, Adelaide will collectively yield 370 apartments. A mixed use development on King William Street will yield 121 apartments, and a 34 storey building comprising a hotel and serviced apartments, will also deliver a further 82 private apartments. Collectively these four (4) developments will deliver 272 student beds.

The construction of the new city high school commenced during the quarter, to be operational in 2019.

# LIVEABLE

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

## CONTEXT

### BROADER ENVIRONMENT

During this quarter, the Australian Bureau of Statistics released the preliminary national estimated resident population data for 2015-16. According to these estimates, Australia's population grew by 1.4% over the year to reach a population of 24.1M as at June 2016. In contrast, South Australia's population growth was 0.5% or 9,300 people. Net overseas migration continues to be the major contributor to population growth in South Australia though this has decreased compared to 2014-15. Together with the larger losses in interstate migration experienced during this time, the state's population growth is lower than the long term average of around 1%.

In September 2016, the Premier of South Australia launched the 'SA: State of Wellbeing' Statement at the 5th Australian Positive Psychology and Wellbeing Conference held in Adelaide. The Statement provided an update on Thinker in Residence, Professor Martin Seligman's 2013 report 'Building the State of Wellbeing' as well as a broad definition of what wellbeing meant for South Australians. The Statement acknowledges that while the idea of wellbeing can vary amongst individuals, there are common elements such as personal safety, economic security, belonging, and connection with others that are shared by all. Based on a survey of 500 South Australians, the statement identified the top three (3) factors of wellbeing – personal wellbeing, family and community wellbeing and societal wellbeing. Council's current work in the wellbeing area will be influenced by the State of Wellbeing Statement.

## 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)

**NEXT UPDATE:** May 2017

### **DIRECTION OF CHANGE**

favourable variance

Growth of the residential population is influenced by many factors including demand for city living and the availability of housing stock. Two (2) 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)

**NEXT UPDATE:** November 2017

### **DIRECTION OF CHANGE**

no change

The Economist Intelligence Unit (EIU) released its 2016 rankings in August 2016. Adelaide remains as 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 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 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 the South Australia Health, Medical and Research Institute (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 and will be presented to Council for consideration.

## HIGHLIGHTS

### QUARTER TWO

The Creative theme includes an objective to grow attendance at festivals and events in the City and Park Lands by 5% by 2020. To track growth, a baseline figure is required.

A highlight in Quarter Two (2) is the calculation of a baseline attendance figure – 5.62M. The events and festivals counted are those that the City of Adelaide sponsors or manages and other major events/activities such as Adelaide Oval attendance. The figure is an average of event attendances over two (2) years (2013/14 and 2014/15) to account for festivals that occur biennially such as the Adelaide Film Festival.

# CREATIVE

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

## CONTEXT

### BROADER ENVIRONMENT

Tourism Research Australia recently released the national and international visitors' survey results for the year to September 2016.

Both domestic overnight and day trip travel grew strongly over the year, driven by more Australians choosing to holiday locally rather than going overseas. During the twelve (12) months to September 2016, there were 6.2M domestic visitors to South Australia with a combined total expenditure of \$3.8B.

Similarly, the number of international visitors coming to Australia at the national level was higher than in the year to September 2015. Strong growth has been reported in Australia's international markets such as New Zealand, China, the United States, Korea and Japan. These countries were also the key drivers for the increase in international visitor spend for the year. In the year to September 2016, there were 430,000 international visitors to South Australia with a total expenditure of \$970M.

On 12 December 2016, the first direct China Southern Airlines flight from China to Adelaide landed at the Adelaide Airport, marking the beginning of the first regular passenger service between China and South Australia. This route will further strengthen the existing economic and cultural ties between the City and China and will assist with the City of Adelaide's focus on leveraging global opportunities brought about from tourism.



## 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 has been calculated. The figure includes events and festivals that the City of Adelaide sponsors or manages and other major events/activities such as Adelaide Oval attendance. A figure has been calculated for 2013/14 and for 2014/15 and then averaged. An average of two (2) years is required to account for the festivals that occur biennially (Adelaide Film Festival, Adelaide International Guitar Festival, dreamBIG Children's Festival).

## 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:**

not available

**NEXT UPDATE:** August 2017

### **DIRECTION OF CHANGE**

not applicable

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 twelve (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 Australia 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 twelve (12) months prior to the 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:**

8.701M (year to Sep. 2016)

**NEXT UPDATE:** May 2017

### **DIRECTION OF CHANGE**

favourable variance this quarter

The number of nights that visitors are staying in the City continues to grow with 2.1M visitor nights recorded during the September quarter 2016, higher than the 1.7M in September quarter 2015. 54% of visitor nights were from Australian visitors while the rest were from international visitors. The main reasons for coming to Adelaide during the quarter were for a holiday (24%), education (23%) and for business purposes (22%).

## 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)

**NEXT UPDATE:** August 2017

### **DIRECTION OF CHANGE**

unfavourable variance

The average rating out of 10 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 Strategic Plan contains a number of actions around building the city visitor experience. In future years we may see an increase in the overall perception of the City as having great places to enjoy events, activities, arts and culture.

## 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)

**NEXT UPDATE:** August 2017

### **DIRECTION OF CHANGE**

favourable variance

The number of 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 people are visiting the City more often than before), and
- an increase in 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 and depends on a variety of factors from perceptions of the City and the City's competitive offer, to the general state of the economy. 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 three (3) factors informing the calculation.