

HIGHLIGHTS

QUARTER THREE

In February 2017, City of Adelaide Lord Mayor Martin Haese and ACT Chief Minister Andrew Barr signed a Smart City Cooperation Agreement, signaling a joint commitment to leading the nation in smart city innovation.

Adelaide and Canberra are already prominent exemplars of smart city innovation and the mutual commitment to share data and best practice information on smart city initiatives aligns with national priorities of improving the connectivity and liveability of cities.

Together, Adelaide and Canberra will seek to raise their respective national smart city profiles, but also boost Australia's smart city reputation on the international stage.

This agreement will help position us for funding through the federal government Smart Cities and Suburbs Program and leverage valuable national and international exposure as leading smart cities.

SMART

A SMART CITY WITH A
GLOBALLY CONNECTED
AND OPPORTUNITY
RICH ECONOMY

CONTEXT

BROADER ENVIRONMENT

The 2.8% increase in the number of businesses and organisations operating in the City, reported last quarter using data from City of Adelaide's Census of Land Use and Employment (ACCLUE) has been supported by data from the Australia Bureau of Statistics (ABS) released in February 2017. The ABS data shows that the number of actively trading businesses in Australia increased by 2.4% from June 2015 to June 2016 with the growth driven by small businesses – those with 20 or fewer employees - as is the case in the City of Adelaide.

Business confidence is an indicator of future business prospects and growth. Data from the Sensis Business Index, a quarterly business survey, last released in January 2017, revealed that confidence among South Australian small and medium businesses is at its highest point in three (3) years, and has doubled over the past 12 months. That result was backed up by the January 25 release of the ANZ Stateometer ranking the South Australian economy third of all states and territories and one (1) of two (2) where the economy is accelerating.

In March 2017 the South Australian Government released the Middle East North Africa (MENA) Action Plan to focus on the significant trade and investment opportunities in that region for South Australia through increased trade with Kuwait, Bahrain, Qatar, United Arab Emirates, Oman, Saudi Arabia, Iran and Egypt.

The six (6) point plan outlines the potential for South Australia to expand exports in the education, mining, defence, energy and resources, health care, water management and tourism sectors and focuses on supporting South Australian exporters to establish long-term sustainable business relationships and to position themselves to be suppliers of premium goods and services.

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 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 THREE

At the end of February, 2017 the South Australia Government and five (5) Brown Hill Keswick Creek (BHKC) catchment councils, including the City of Adelaide, signed an agreement on a \$140 million infrastructure project to safeguard against flooding in the Brown Hill and Keswick Creek catchment.

The flood mitigation works detailed in the Brown Hill and Keswick Creek Stormwater Management Plan will reduce the number of properties affected by a 1-in-100 year flood event by nearly 98 per cent. The infrastructure project will deliver about 73 full-time jobs during construction.

Under the agreement the South Australian State Government will contribute \$70 million and/or 50% of the project costs over 20 years. The five (5) catchment councils have made provisions for funding within their long term financial plans but will continue to seek additional funds with the support from State Government to bridge the funding gap with the Federal Government.

The Minister for Water and the River Murray has asked that the Victoria Park - South East Park Lands, (Park 16), Park 20 and Glenside be the first projects to be progressed.

The BHKC Project Steering Group has given in principle support for the detailed design works to commence this financial year on this section of project.

GREEN

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

CONTEXT

BROADER ENVIRONMENT

In March 2017 the South Australian Government released South Australian Power for South Australians, a comprehensive plan to ensure reliable, affordable and clean power for South Australia. The focus is on more of the State's power being sourced, generated and controlled in South Australia.

Key to the plan is building Australia's largest battery to store energy from the wind and sun, and building a government-owned 250MW gas-fired power plant to provide emergency back-up power and system stability services for South Australians as well as other initiatives. Continuity of energy supply at reasonable prices is important to City residents and businesses, as it is throughout the State.

A reliable energy supply is critical to households and businesses and to the reputation of South Australia as a place to live and do business. A survey by Business SA of its members after the state-wide blackout in September 2016 put the overall financial impact on South Australia at a loss of \$367 million.

The Business SA survey determined a median trading/production loss of \$1,500 for businesses in the retail sector, a key sector in the City of Adelaide.

2016/17 CITY SCORECARD
QUARTER THREE

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.

Data source: City of Adelaide

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 Adelaide City Council 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 Three (3), 63 trees have been planted in new street locations. Tree holes have been prepared for a further 196 trees (123 replacement trees and 73 additional trees).

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 will commence in Quarter Four (4). The first round of carp eradication was completed.

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

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. Council has seen a small increase in waste going to landfill over the first nine (9) months as a result of providing waste services to an increasing number of medium to high density dwellings. General waste has increased marginally to 3239.77 tonnes compared to 3174.62 tonnes over the same period in 2015/16. As a positive correlation, Organic / Green Waste has increased to 484.07 tonnes compared to 396.41 tonnes over the same period and recycled material has increased in volume to 1457.73 tonnes compared to 1298.24 tonnes in the 2015/16 period. This is directly related to providing weekly organics and recycling to medium to high density dwellings. Over this time period there has been a two percent (2%) 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

Council currently tracks mains water use, recycled water use and the cost of both. In Quarter Three (3), the City of Adelaide commenced a review of the Water Quality part of the Biodiversity and Water Quality Action Plan and Water Security Action plans. This will help to inform and develop the Integrated Water Management Plan and Integrated Water Management Measure. The review is scheduled to be completed in Quarter Four (4).

Data source: City of Adelaide

HIGHLIGHTS

QUARTER THREE

On 1 February 2017, a Community Open Day was held in the Adelaide Town Hall to inform a study commissioned by the Government of South Australia into the electrification of public transport in Adelaide, including the AdeLINK tram network. Participants had the opportunity to see the potential routes and integration opportunities including tram stop locations.

During this quarter, the Australian Bureau of Statistics (ABS) released the monthly building approvals data for the City for January 2017. During the month, the total value of residential buildings approved in the City including alterations and conversions was \$63 million. The value of non-residential approvals was \$789 million.

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 ABS released new estimated resident population data for Local Government Areas. This follows the release last quarter of population estimates for the States and Territories. The population estimates data shows a 2.0% rate of growth for the City of Adelaide from June 2015 to June 2016. This is the second highest in South Australia, behind the Town of Gawler's 2.6% growth, and well above the 0.5% rate of growth experienced by South Australia as a whole. The 0.5% rate of population growth for South Australia from 2015 to 2016 is below the long term average of around 1% and reflects prevailing economic conditions. The City's 2.0% rate of growth is less than half what is required to meet City of Adelaide's target of 28,000 residents by 2020.

While there are a significant number of residential approvals, and a number of projects for which construction commencement is imminent, household size and dwelling occupancy rates affect the extent to which housing development translates to population growth.

2016/17 CITY SCORECARD
QUARTER THREE

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%

The release of ABS Census 2016 data at Local Government Area level from July 2017 will provide further insight into the size and characteristics of the resident population of the City of Adelaide.

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 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:

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 THREE

Peak event season occurred in this quarter with the following major events taking place in the City of Adelaide from January to March 2017:

- Adelaide Festival
- Adelaide Fringe
- Womadelaide
- Clipsal 500
- Tour Down Under
- Adele concert at the Adelaide Oval

Festival activity boosts the City economy enormously with locals and visitors enjoying the array of activity. More than \$3 million in box office sales was achieved for the Adelaide Festival alone a week ahead of its official March 3 opening – well over the previous highest takings of \$2.5 million in 2010.

Adelaide Fringe events sold more than 650,000 tickets, an increase of 9% on the previous year.

According to Tourism Research Australia (TRA) data, business visits to South Australia are up 11% in the year to December 2016 compared to the year to December 2015.

CREATIVE

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



2016/17 CITY SCORECARD
QUARTER THREE

CONTEXT

BROADER ENVIRONMENT

In March 2017, TRA released a study, Chinese Free and Independent Travellers to South Australia. The study revealed that South Australia's clean air, wildlife and opportunities for exploration/adventure have high appeal for Chinese visitors, and that more Chinese-language options in the airport and on public transport in Adelaide would improve the on-the-ground experience and encourage positive word-of-mouth. 41% of Chinese residents in the on-line survey were aware of Adelaide as a destination, ahead of the Barossa Valley (30%), and behind Kangaroo Island (65%). The study suggests that Adelaide should focus on accommodation and accessibility to increase the market share of visitors and that the perception of safety needs to be managed as it is a key priority for Chinese visitors.

TRA's International Visitors' Survey results for the year to December 2016 show that international visits to South Australia grew by 5.8%, with expenditure rising 8.2%. Chinese visits increased by 41% to 45,000, injecting over \$250 million into the State's visitor economy. The USA became the second largest market for inbound travel - up 33% to 53,000 visits. Of all international visitors, 90% (365,000) spent time in Adelaide.

South Australia's visitor economy has reached \$6.2 billion, an \$800 million improvement in the past year.

TRA's National Visitor Survey shows that in the year to December 2016, domestic travel continued to be the highest contributor to the South Australian visitor economy a record high 6.2 million domestic overnight visitors, up 6.1%. Intrastate travel accounted for 3.9 million overnight visits, followed by 1.1 million visitors from Victoria. The Adelaide Tourism Region attracted the most domestic visits at 2.5 million.

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 Quarter Two (2). 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:

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 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.

Data source: City of Adelaide City User Profile Survey 2016

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:

8.128M (year to Dec. 2016)

NEXT UPDATE: August 2017

DIRECTION OF CHANGE

favourable variance

In the 12 months to December 2016, there were a total of 8.1 million visitor nights, similar to the total in the year to December 2015. In the December quarter 2016 alone, there were a total of 1.9 million domestic and international visitor nights to the City. This is less than the 2.5 million visitors recorded for December quarter 2015 and is also less than the 2.1 million visitor nights recorded in the previous quarter. This is may be due to the decrease in the number of international visitor nights in spite of an increase in visitor numbers, which suggest that while more overseas tourists are coming to the City, they are spending less time here.

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:

8.2/10 (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.

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 (2015)

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)