

STATE OF THE CITY

CITY OF ADELAIDE
2023 UPDATE



CITY OF
ADELAIDE

Executive Summary

This document captures the attributes, opportunities and challenges identified from research to inform the strategic planning process for the City of Adelaide.

Bringing together information from a wide range of resources, an overview of the operating environment for the City of Adelaide is able to be built to help guide discussions.

The information, analysis and policy implications provided is based on the research undertaken at a point in time.

Policy positions, options and strategies for fostering and stimulating community and city growth are not explored as part of this report. These will be explored through future planning processes, including the City Plan and the City of Adelaide's next Strategic Plan.

The State of the City Report contains the following chapters.

Changing Community Profile

Paints a picture of our community now and into the future using Australian Bureau of Statistic 2021 Census data. It considers the demographic characteristics of the resident population and what it could look like in the future. This includes an understanding on the role of migration, in particular overseas migration and how it has shaped the city.

Global Challenges

Provides an overview of international geopolitical issues that could have an impact on the City of Adelaide. It covers themes that supersede national boundaries such as climate change, and other environmental concerns such as water security.

Community and the Built Form

Considers community health and how this interplays with the physical environment. It covers off on the impact of COVID-19 at a global and state level and how urban environments can contribute, or inhibit, the spread of pandemics. This chapter also looks at the health and wellbeing of the city's resident population within the context of State policies and plans to understand how the City of Adelaide can continue to safeguard the health and wellbeing of our community.

Culture and Economy

Considers the importance of culture and cultural heritage to the City of Adelaide and how it links to economic outcomes. This chapter covers a broad range of topics including education, skills, workforce, tourism and cost of living.

These chapter headings are an intentional departure from the traditional social, economic, environmental framework to capture the overlapping and symbiotic nature of these concepts. They also align with the seven global megatrends as outlined in the CSIRO's report¹ – *leaner, cleaner and greener; the escalating health imperative; geopolitical shifts; diving into the digital; increasingly autonomous; and unlocking the human dimension.*

Policy Implications

The policy implications which need to be considered by the City of Adelaide are summarised below under each of the chapter headings. Further, The City of Adelaide as the capital city of South Australia needs to consider its role in service provision and advocacy for residents, businesses, workers and visitors, partnership responsibilities and to be a leader in the local government sector.

Changing Community Profile

1. Population growth: The City of Adelaide has experienced population growth that exceeds that of the State and previously had a peak population of 43,000 in 1915. There are advantages to having a larger population for example increased productivity through economies of scale. Consideration should be given on how the City of Adelaide encourages population growth while at the same time, improving the amenity of the city for non-residents.
2. Population distribution and forecasted growth: The City of Adelaide is forecast to grow at one of the fastest growth rates compared to other councils, to 46,364 residents by 2041. This population is expected to be substantially located within the suburb of Adelaide, creating disparity with North Adelaide in terms of representation. This will need to be considered in strategic planning, asset management, service provision, and fair and equal governance via Representation Reviews.
3. Age profile: The City of Adelaide has two distinct demographic areas with North Adelaide and the southeast corner of Adelaide representing a more polarised age structure with the young and old; while central Adelaide is dominated by twenty somethings (double the proportion of Greater Adelaide) who tend to be more transitory.
4. Overseas Migration: Between 2016 and 2021, 73.9% of the City of Adelaide's population turned over with one in four migrating from overseas and 4 in 10 migrating from elsewhere in Australia. This suggests the City of Adelaide acts as a demographic entrepot, importing people from overseas and distributing people overseas, interstate and to the inner suburbs of metropolitan Adelaide. Coupled with the dominance of twentysomethings, the City of Adelaide will need to consider the opportunities to plan for long term infrastructure and services.
5. National Migration Policy and Implications: The City of Adelaide will need to consider what the Commonwealth Government's increase to migration levels will likely have, as the City of Adelaide is likely to attract a large proportion of the migrants who come to South Australia and the opportunities that arise out of this.

Global Challenges

6. Threats of Global Unrest: A regional conflict is beyond the City of Adelaide sphere of control. However, the City of Adelaide should consider contingency planning for the impacts on trade, the economy and cultural relations as well as identify new opportunities for investment.
7. Human Rights: The City of Adelaide will need to comply with the requirements for a *Modern Slavery Act 2018* Statement about its global supply chain.
8. Climate Change: The City of Adelaide will need to continue to collaborate with the State Government on delivering the South Australian Climate Change Action Plan 2021 – 2025 and emissions reductions, including engagement with business and the community, to successfully transition South Australia to a low and zero emissions future. The City of Adelaide will need to consider actions to support reductions in emissions across waste, refrigerants, stationary energy, and reduced vehicle use and accelerating the shift to electric vehicles.
9. Water Security: The City of Adelaide will need to continue to collaborate with the State Government on delivering the South Australian Water Security Statement 2022 to successfully transition South Australia to a sustainable water future.

Policy Implications

(continued)

Community and the Built Form

10. Public Health Management: The City of Adelaide will need to consider what lessons it learnt from the COVID-19 public health emergency and how it can effectively risk manage future pandemics and public health concerns within a more populous and denser urban environment. The City of Adelaide will also need to consider a reimagined role for the city in an environment where working from home is more prevalent.
11. Environmental Health: The City of Adelaide needs to consider how it can contribute to reducing traffic pollution and combustion vehicle use and emissions, given the public health imperative, in addition to the greenhouse gas reduction and zero emission imperatives.
12. Public health planning: The *Public Health Act 2011 (SA)* requires local government to have regional public health plans which identify and address public health issues, including responding to the burden of disease, and inclusion of vulnerable groups.
13. Diversity, Access and Inclusion: The City of Adelaide has and will continue to have a small proportion of vulnerable resident who are disabled and/or at either end of the age spectrum, being children, or seniors and elderly; in contrast to a metropolitan area with a larger proportion of children, and the elderly population forecast for metropolitan Adelaide, South Australia and Australia. The City of Adelaide will need to consider a universal design and urban form which accommodates these vulnerable groups by being disabled, child and elderly friendly especially as a capital city which wishes to attract visitors and have robust housing stock.
14. Income and wealth distribution: The City of Adelaide's population is economically polarised between those earning the highest incomes and those earning the lowest or nil incomes; and those owning or with mortgage, and those renting. This polarisation is reflected spatially with North Adelaide having a greater representation of higher incomes, and home ownership and Adelaide having a greater portion of lower incomes and renting.
15. Housing Density: Ninety nine percent (99%) of dwelling construction over the past 30 years has been in the form of high or medium density apartment buildings. The City of Adelaide will need to consider that the forecasted population growth is likely to be higher density apartments within the suburb of Adelaide, accommodating lone persons and couples without children, and the opportunities that arise from this.
16. State Housing Policy: The City of Adelaide will need to consider the role it wishes to play in supporting the South Australian Housing Authority's Housing Future 2020-2030, housing priorities, housing affordability, and homelessness.

17. Planning and Built Form: The 30 Year Plan for Greater Adelaide released in 2017 sets the policy direction against which the Residential Design Code must be consistent. The Residential Design Code is the statutory policy against which development applications are assessed. The City of Adelaide needs to ensure the Residential Design Code policy reflects the policy direction of the 30 Year Plan for Greater Adelaide.
18. Conservation of Built and Natural Heritage: Given the cultural, heritage, economic, social and environmental value of the 1837 Adelaide Plan and its living landscape, the City of Adelaide will need to consider the legal and planning frameworks to ensure effective conservation and ongoing management against competing interests. There are also opportunities to identify how the economic, social and cultural capital of the city could be further leveraged to benefit the community.
19. Stormwater Management and Water Security: Given the impact of climate change and the need to more effectively manage water security across the State, the City of Adelaide will need to consider better managing stormwater as a resource across the city and the opportunities that arise from this in conjunction with other local government areas within the same catchments.
20. Fire hazards and management: The City of Adelaide is forecasted to have one of the fastest population growth rates in the next 20 years which will be substantially located in high density residential development; and have considerable natural environment restoration within the Park Lands to combat climate change. Both will increase the risk of bush and residential fires which will place greater pressure on emergency services to be effectively trained and resourced to respond. The City of Adelaide's first response should be to incorporate fire management planning, as outlined by the Department for Environment and Water, into the City of Adelaide's Management Plans to help identify, implement and monitor risk management strategies.
21. Urban Heat Island Effect: Given the forecasted residential development for the City of Adelaide, it is imperative to consider both building and public realm design to mitigate and counter the impacts of severe heat upon both assets, residents and visitors.

Policy Implications

(continued)

Culture and Economy:

22. Dividends From Cultural Diversity: Just as the City of Adelaide's strong English and Australian connections have supported social and economic collaboration across Australia and within the United Kingdom, Commonwealth and English-speaking countries; the City of Adelaide should consider its strong cultural connection with east Asia which presents an opportunity for further social, economic, and cultural diversification.
23. Voice to Parliament: As the South Australian capital city and a sector leader, the City of Adelaide should consider the impact of the Voice referendum and its relationship with the State Government to better address First Nation human rights concerns.
24. First Nations and Reconciliation: The City of Adelaide should consider how to better embed reconciliation into business as usual and how First Nation representation could be incorporated into the next Representation Review to further reconciliation.
25. Skills and qualifications: There is a larger share of the City of Adelaide population with higher qualifications compared to Greater Adelaide. The City of Adelaide should consider the advantages, opportunities and synergies from having a skilled workforce and a cluster of research institutes, and how this translates to being an innovative city.
26. Building human capital: Future growth will be influenced by the extent to which the qualifications on offer match the skills required in a growing and changing economy. The City of Adelaide should consider how human capital is the new driver of economic growth and businesses are now recognising that access to human capital is a key consideration when deciding where to locate or expand.
27. Wages and Cost of Living: The disparity between wages growth and cost of living increases and potential for recession could exacerbate the disparity between city residents on higher incomes versus those on lower incomes. Furthermore, still recovering from the COVID-19 emergency, businesses are likely to be impacted by sales contractions and potential shop and office vacancies. The City of Adelaide will need to consider contingency planning for the social and economic consequences.
28. Green and Circular Economy: There are international, national and state policy instruments that encourage and support the transition to a green or circular economy. The City of Adelaide will need to continue to focus efforts and identify opportunities in this space to support this transition.

29. Tourism: The tourism sector continues to recover following the impacts of the COVID-19 pandemic. There are several tourism-related strategies and plans that influence the work of City of Adelaide in this space. The city has shown a strong recovery in the tourism and events space and efforts need to be continued to ensure that the city maintains and enhances its positioning as a centre of tourism activity.
30. Regional Employment Hub: As a capital city the City of Adelaide attracts a large external workforce because of the major employment activities located within. Knowing where workers reside assists in planning, understanding self-containment, and the degree to which the City of Adelaide provides regional employment.
31. Current And Future Skills Shortage: Understanding the current and future skills shortages will enable the City of Adelaide to identify avenues of addressing this, including opportunities on how the City of Adelaide could work together with other levels of government.
32. Local Economy: The City of Adelaide has experienced positive economic growth in terms of gross regional product since 2012, contributing to a greater share of the State's economic output. Similar to other capital cities, industries that have driven this growth have tended to be knowledge-based sectors. The City of Adelaide will need to consider how it continues to encourage growth in these sectors while at the same time, be cognisant of emerging sectors such as the technological, medical, health and social services.
33. Artificial Intelligence and Work: Like most industrial changes, artificial intelligence (AI) will improve service delivery and productivity. The rapid development and transition to artificial intelligence will disrupt the current economic and labour market as it adjusts to this transformation. The City of Adelaide will need to consider how to proactively manage the economic and labour force transformation which will occur in the city and the opportunities that will arise from this.
34. Emerging Technologies and Challenges: Digital transformation, smart cities, cybersecurity, AI and other emerging technologies and challenges have a place in a mature public sector. As a local government, it is important to balance the benefits of AI through automation, personalised services with protecting the community's interest.

Kurna Acknowledgement

City of Adelaide tampendi, ngadlu Kurna yertangga banbabanbalyarnendi (inbarendi). Kurna meyunna yaiya mattanya Womma Tardanyako.

Parnako yailtya, parnuko tappa purruna, parnuko yerta ngadlu tampendi. Yellaka Kurna meyunna itto yailtya, tappa purruna, yerta kuma burro martendi, burro warriappendi, burro tangka martulyaiendi. Kumarta yaiya miyurna iyangka yalaka ngadlu tampinhi.

City of Adelaide acknowledges the traditional Country of the Kurna people of the Adelaide Plains and pays respect to Elders past and present. We recognise and respect their cultural heritage, beliefs and relationship with the land. We acknowledge that they are of continuing importance to the Kurna people living today. And we also extend that respect to other Aboriginal Language Groups and other First Nations.



Table of Contents

Introduction.....	1
Changing Community Profile	2
Global Challenges	14
Community and the Built Form.....	21
Culture and Economy.....	36
Appendix A –	
What the 30 Year Plan states for the Adelaide City Centre	54
References (end notes)	56

The *Local Government Act 1999* (section 122) and the *City of Adelaide Act 1998* (section 30) requires the City of Adelaide to undertake strategic planning and in doing so consider regional, state, national, and wider issues affecting the City of Adelaide.

This report is a point in time capture of the attributes, opportunities and challenges identified from qualitative and quantitative research, that inform the strategic planning process for the City of Adelaide. These are evolving and require constant monitoring to ensure the latest data and research is used to inform decision making.

In consideration of these attributes, opportunities, and challenges, policy implications have also been included to inform evidence-based policy decision making.

This report, however, does not present policy positions. Before forming a policy position, the policy implications raised by this report need to be considered in the context of the City of Adelaide's role.

introduction

ROYAL HOSPITAL
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HEAL
COUNTRY
AUSTRALIA

105

Local Government and Capital City

The City of Adelaide is both a local government with over 25,000 residents, as well as a statutory Capital City at the historic, geographic, economic, and cultural centre of a metropolitan area of 1.3 million residents. Strategic planning for growth needs to acknowledge and manage this dichotomy.

As a local government, the City of Adelaide's role includes representing and acting in the interests of the local community, in a socially just and ecologically sustainable manner, which improves the quality of life of the community.ⁱⁱ

As a Capital City, the City of Adelaide role includes promoting and enhancing the special social, commercial, cultural and civic role that the City of Adelaide plays as the capital city and heart of South Australia; and ensuring access to the City of Adelaide for all South Australians.ⁱⁱⁱ

This report assumes that the current State Government legislative and constitutional arrangement for local government continues without change. Under this assumption, the City of Adelaide will work in partnership with the State Government for the advancement of the City of Adelaide and the State.

State and Commonwealth Policy Context

The Commonwealth and State Governments have an established mechanism to aid the state implementation of national policy.^{iv} Due to this, if the City of Adelaide ensures it considers State Government strategic plans as required by the *Local Government Act 1999 (SA)*, the City of Adelaide is in theory also considering national issues.

State Government strategic plans help clarify the focus and priorities of an agency. Of the 29 South Australian public sector agencies, eight have no strategic plans, and several agencies' plans were outdated. This was the case for agencies responsible for major infrastructure provision and investment, which creates significant public risk.^v All public sector agencies should apply good business rigour and practice.



changing community profile

Overall Population Growth

The population of the city⁶ has fluctuated throughout history. At its peak, the population reached just over 43,000 people. By the early 1980s however, it had reduced to below 13,000 persons. This was due to almost wholesale conversion of city premises to commercial uses coupled with household preferences for suburban living. Figure 1 shows the change in the enumerated (counted) population since 1971.⁷

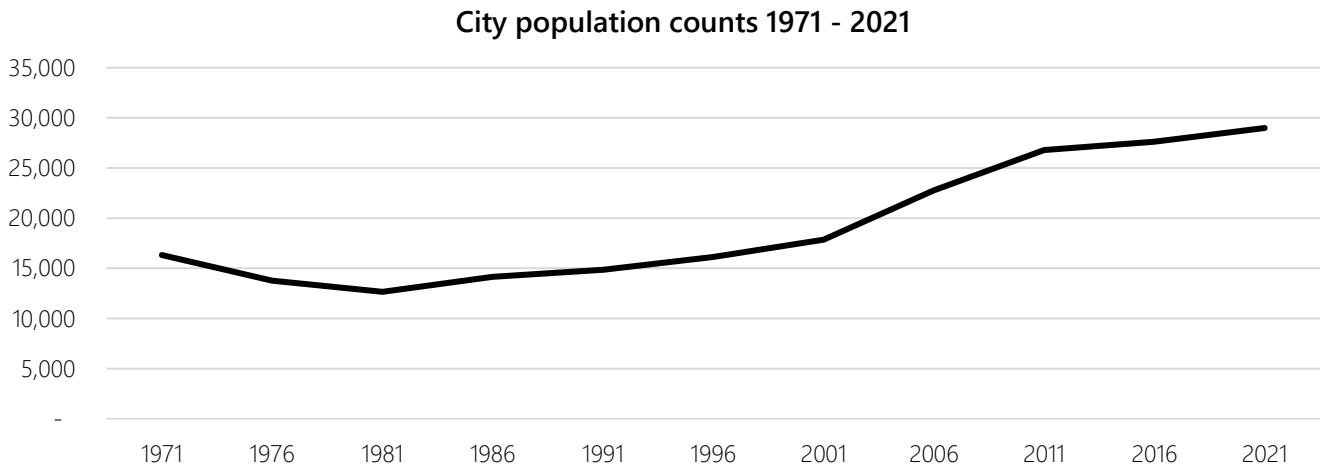


Figure 1 – City population counts 1971-2021⁸

Since 2001 the population of the city has increased by 11,129 persons or 62%. This equates to an average of growth of 2.5% per year and is significantly higher than the growth rate of the South Australian population. From the early 2000s, the city experienced a period of rapid growth, largely due to the influx of people coming from overseas. Between 2001 and 2010 there were 1,320 arrivals into the city compared to around 400 in previous decades. Overseas arrivals to the City of Adelaide increased exponentially over the past two decades. Of the 11,372 city residents who were born overseas, just under 6,000 arrived in Australia between 2016 and 2021.⁹

The growth of the city population has slowed in recent years. Between 2011 and 2016, the city’s population rose by 811 persons compared to 4,033 persons between 2006 and 2011. Between 2016 and 2021, the city’s population increased by 1,376 persons. Figure 2 below shows the five-yearly change of the city’s population since 1971.

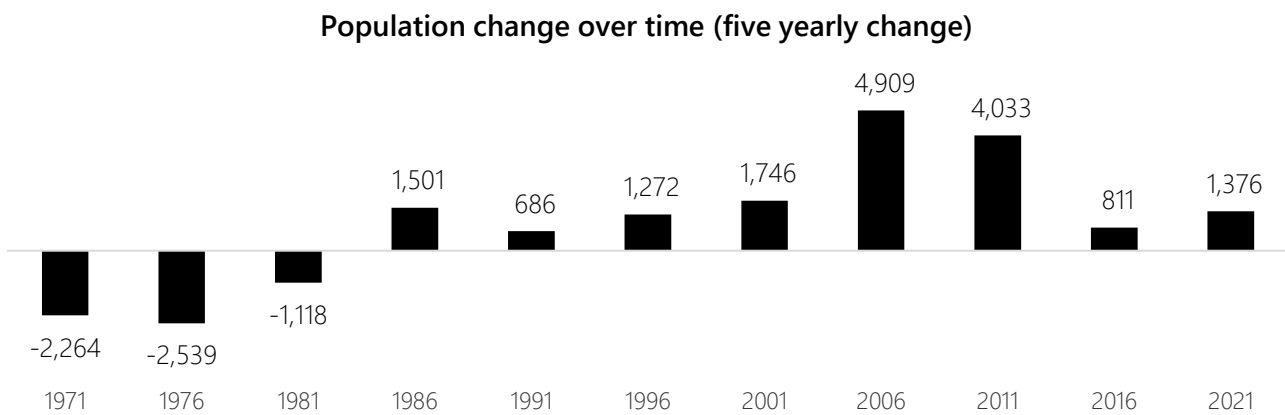


Figure 2 – Population change (five yearly), 1971 – 2021¹⁰

The estimated resident population (ERP) is the official measure Australia’s population based on the concept of usual residence.¹¹ It differs from the enumerated population, which is simply a count of people who were in the city when the Census was undertaken. According to the latest data available, the city’s ERP was 26,120 as at 30 June 2022. The growth in ERP from 2002 to 2022 is illustrated below.

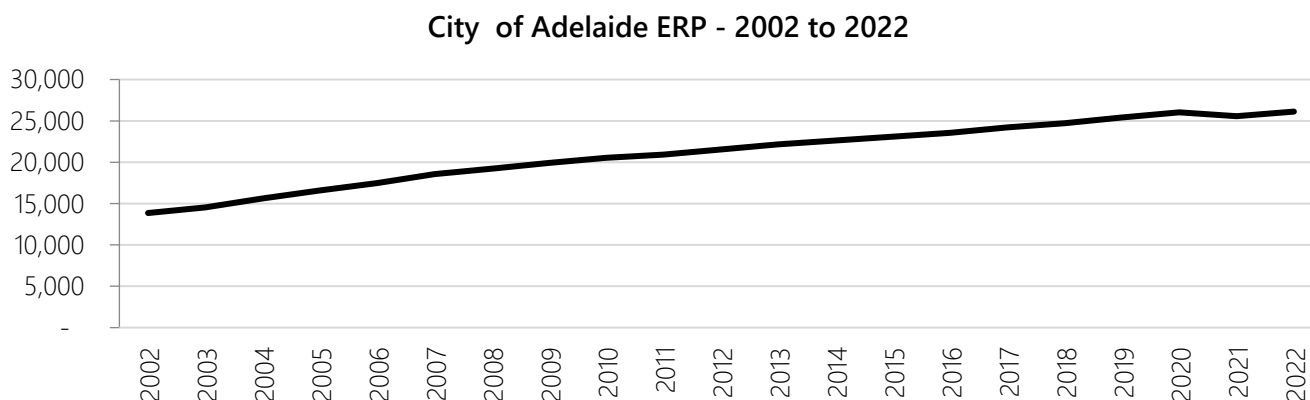


Figure 3 – City of Adelaide estimated resident population (ERP), 2002 – 2022¹²

Similar to the movement in the enumerated population, the number of city residents has seen a positive trend since 2002, except in 2021 when it fell slightly. This is likely to be due to a drop in migration levels as Australia closed its international borders in response to the pandemic. Between June 2021 and June 2022, the City of Adelaide’s ERP growth was 2.2%, exceeding the national growth rate of 1.2% during the same period. Compared with other capital city councils, the city’s population growth was similar to Perth (2.3%), greater than that of Sydney (1.3%) and Brisbane (1.6%), but less than Melbourne (4%). Hobart and Darwin local government areas experienced negative population growth between 2021 and 2022.¹³

The advantages of a larger city population are well documented. The main arguments for population growth relates to increased productivity by allowing businesses to benefit from economies of scale, having the ability to sustain a broader range of industries as well as providing wider employment opportunities.¹⁴ Cities have traditionally clustered business and people in a central location. This improves access to learning either through the creation or sharing via face-to-face interactions (knowledge spill overs), sharing of infrastructure, inputs and supply chains, and access to a wider pool of potential workers.¹⁵

Figure 4 outlines the North Adelaide and Adelaide population growth between 1991 and 2021, and the forecasted growth from 2021 to 2041. Though enumerated and usual resident population counts are not directly comparable, it provides a broad indication of historic versus, forecasted growth in these two suburbs.

Between 1991 and 2021 the City of Adelaide’s enumerated population increased from 14,656 to 28,990 (14,334), equivalent to an average 3.3% per annum growth rate. This growth rate makes the City of Adelaide one of the fastest growing local governments in South Australia. However, this growth has not occurred evenly across the city. For example, North Adelaide experienced an annual average growth rate of 0.2% between 1991 and 2021 while the rest of the Adelaide experienced an annual average growth rate of 6.6% during the same period.

The City of Adelaide’s population is forecast to grow to 46,364 (17,374) by 2041, equivalent to an average 2.99% per annum growth rate.

North Adelaide’s proportion of the overall City of Adelaide population declined from 49% (1991) to 25% (2021). At the same time, the suburb of Adelaide’s proportion has grown from 51% (1991) to 75% (2021). This disparity in growth is forecast to continue over the next 20 years with North Adelaide declining to 17% and the suburb of Adelaide rising to 83%.

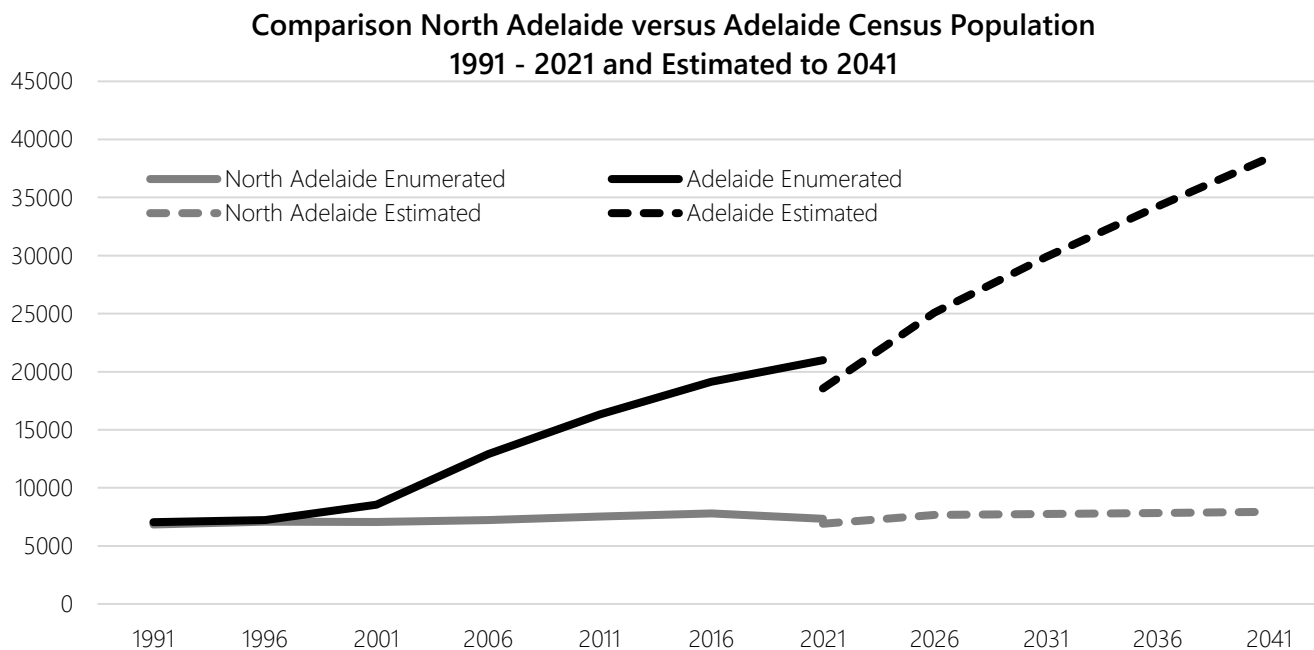


Figure 4 – Comparison of growth North Adelaide compared with Adelaide^{16 17}

Figure 5 outlines the percentage change in estimated residential population from 2007 to 2022 comparing the City of Adelaide against Greater Adelaide. This reinforces that the City of Adelaide has had a greater population growth rate compared to Greater Adelaide, despite the negative growth in 2021 due to a reduction in overseas migration as a result of COVID-19.

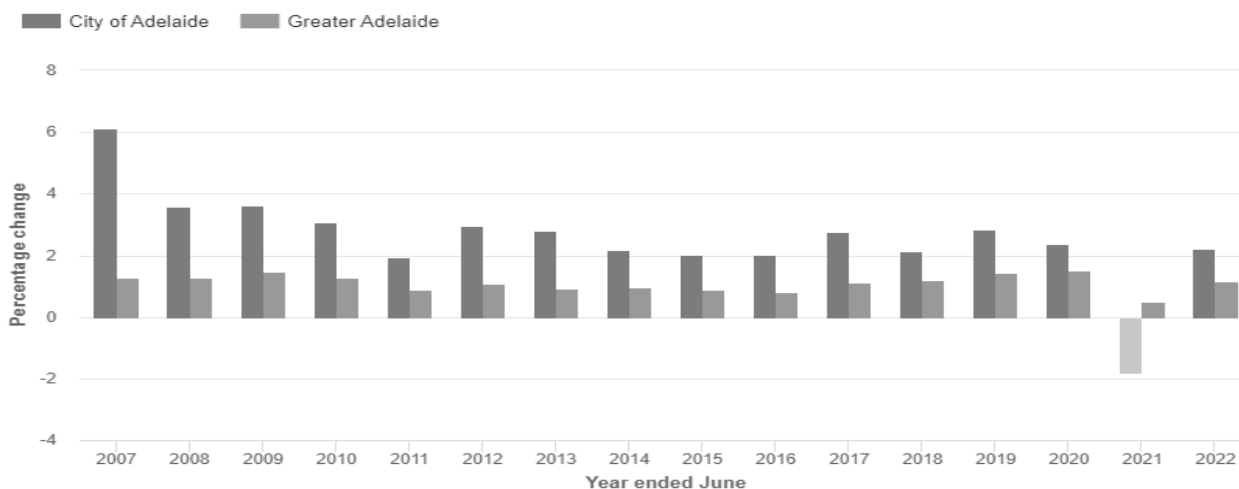


Figure 5 – Change in ERP City of Adelaide compared with Greater Adelaide, 2007 to 2022¹⁸

Policy Implications:

1. Population growth: The City of Adelaide has experienced population growth that exceeds that of the State and previously had a peak population of 43,000 in 1915. There are advantages to having a larger population for example increased productivity through economies of scale. Consideration should be given on how the City of Adelaide encourages population growth while at the same time, improving the amenity of the city for non-residents.
2. Population distribution and forecasted growth: The City of Adelaide is forecast to grow at one of the fastest growth rates compared to other councils, to 46,364 residents by 2041. This population is expected to be substantially located within the suburb of Adelaide, creating disparity with North Adelaide in terms of representation. This will need to be considered in strategic planning, asset management, service provision, and fair and equal governance via Representation Reviews.

Age Structure

The age-sex pyramid is a demographic tool which shows patterns of change in the age structure and sex ratio of an area over time. Its name comes from the traditional pyramid shape representative of lots of children in large families, and a lower life expectancy and relatively few elderly. This shape is quite rare in developed nations like Australia. As nations and areas transition over time this shape turns into a column representative of reduce fertility and children, and increased life expectancy and more elderly.

Figure 6 presents the age-sex structure for the City of Adelaide in 2021 in comparison with Greater Adelaide. It shows that in 2021, the City of Adelaide had half the proportion of children under 15 and double the proportion of 20 to 29 years of age. More specifically:

- The 20 to 29 age cohorts were the dominant group within Adelaide.
- Under 15 and over 70s age cohorts are most pronounced in North Adelaide and the southeast corner of Adelaide.

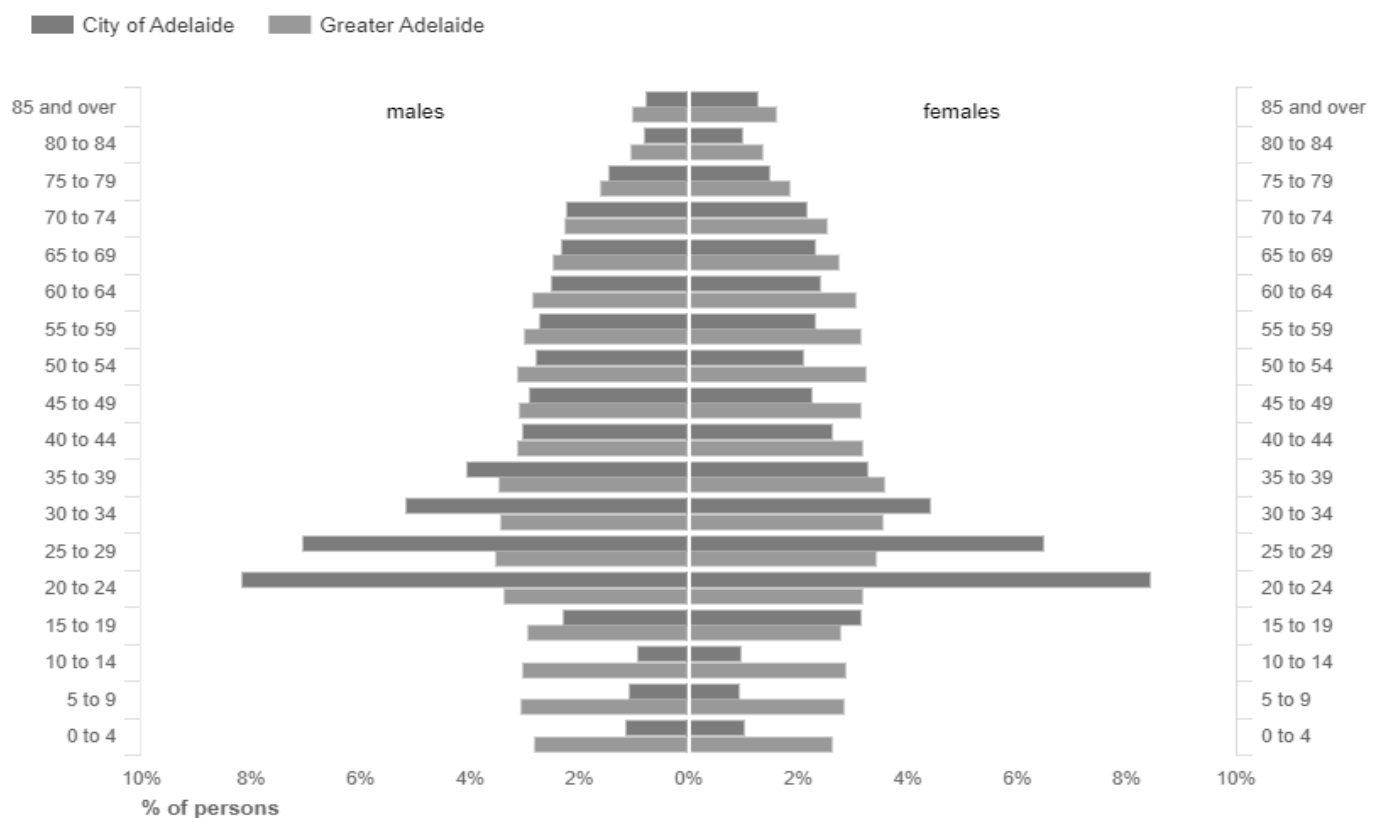


Figure 6 – Age Sex Pyramid City of Adelaide compared with Greater Adelaide 2021¹⁹

Based on previous censuses this is a pattern that has been maintained since 1991. This is partially due to the twentysomething cohorts declining rapidly as they reach their 30s as significant proportion leave the City of Adelaide as residents, likely to reflect the international student population.²⁰

The younger age profile of the City of Adelaide resident population compared to Greater Adelaide, is also reflected in the median ages. For the City of Adelaide, the median age is 32 compared to 39 for the metropolitan area.²¹

Within the City of Adelaide there was a lower proportion (10.7%) of seniors and elderly (aged over 70), compared with 13.3% for Greater Adelaide. As the City of Adelaide population is forecasted to increase to 2041, the number of seniors and elderly is expected to grow (by 1,442 people) but their proportion of the population will decline to 8.9% as they are outpaced by population growth among younger cohorts²². In contrast, the number of those under 15 could grow by 1,631 people in 2041, which means that the share of this group will increase slightly to 6.8%²³.

An increasingly ageing population has several implications for the City of Adelaide. For example, walkability and accessibility may be more relevant when designing the urban form. The relationship between age and the need for assistance may give rise to new service demands, presenting economic opportunities for local businesses. This could be in the form of increased demand for retirement income support, health, and aged care services.

Policy Implications:

3. Age profile: The City of Adelaide has two distinct demographic areas with North Adelaide and the southeast corner of Adelaide representing a more polarised age structure with the young and old; while central Adelaide is dominated by twenty somethings (double the proportion of Greater Adelaide) who tend to be more transitory.

Residential Workforce

The size of City of Adelaide’s resident labour force in 2021 was 13,936, of which 4,777 were employed part-time and 7,215 were full time workers. A snapshot of the industries of employment for City of Adelaide residents compared to Greater Adelaide residents is depicted in Figure 7. These five largest industry sectors represent 59.7% of employed residents. The proportion of people employed in the Professional, Scientific and Technical Services; and the Accommodation and Food Services Sectors are double the rate of Greater Adelaide.

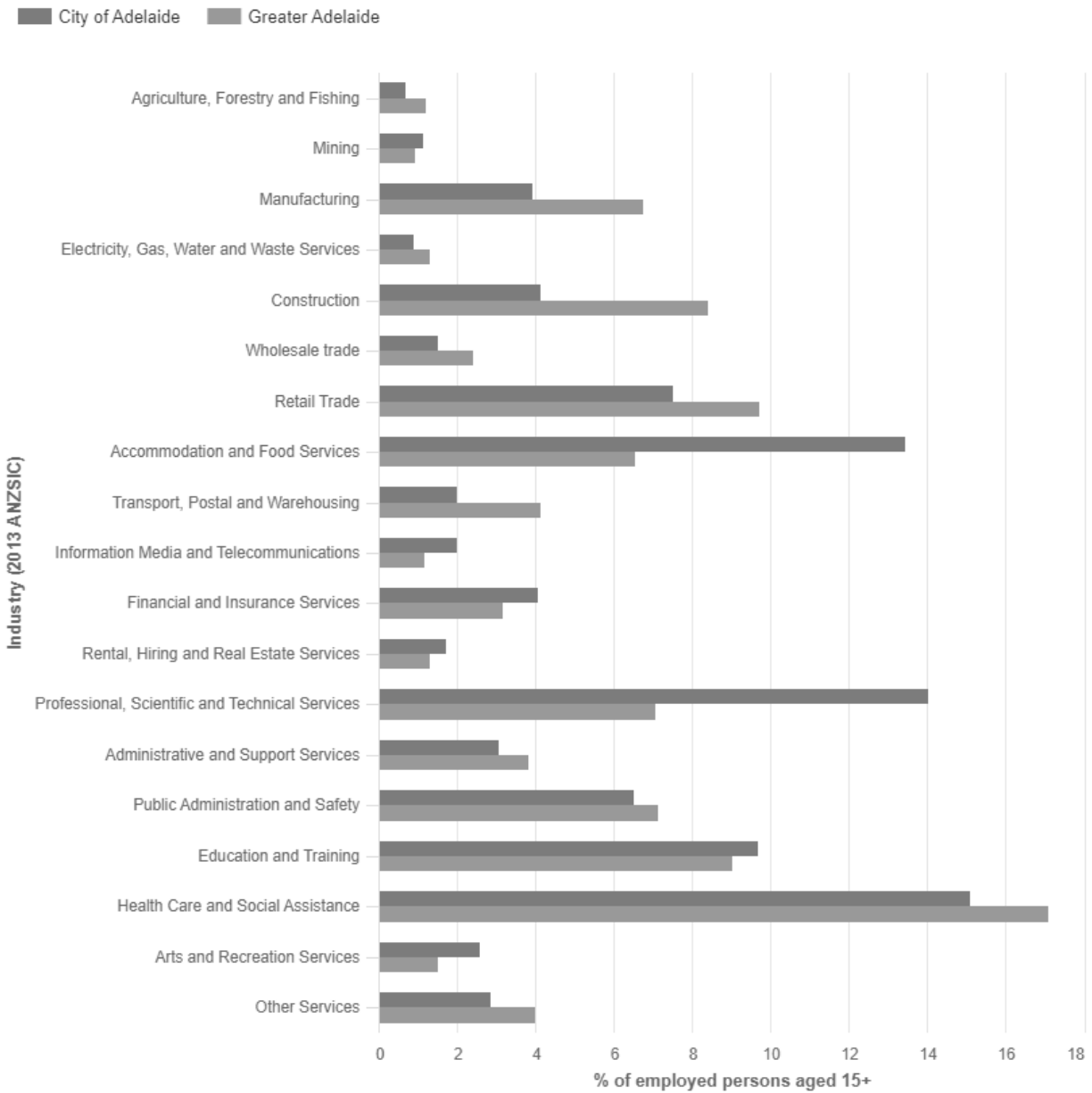


Figure 7 -Total employment by industry City of Adelaide and Greater Adelaide comparison 2021

Source: City of Adelaide Profile ID <https://profile.id.com.au/9delaide/home>

The number of employed residents in City of Adelaide increased by 3,379 between 2016 and 2021 which is larger than the population increase during the same period. The three most popular occupations for employed residents in 2021 were:

- Professionals (4,736 people or 37.5%)
- Managers (1,728 people or 13.7%)
- Community and Personal Service Workers (1,687 people or 13.3%).

In combination these three occupations accounted for 8,151 or 64.5% of the employed resident population. In comparison, Greater Adelaide only employed 48.9% across these three occupations. This supports the City of Adelaide having residents in more 'white collar' occupations, and fewer 'blue collar' and service-based occupations.

Migration

Migration, or residential mobility, together with births and deaths are significant components of population change in Australia. The three main types of migration are overseas migration, interstate migration and within-state migration. Migration flows can indicate whether the population is sedentary and likely to be in the area for a long time (and perhaps have significant ties to the community), or transient, and likely to move on.

Between 2016 and 2021, Australia-wide, 53.1% of people (aged 5 and over) did not change address, 35.3% moved within Australia, and 5.4% moved from overseas. In contrast, the share of people who did not change address in the City of Adelaide was half the national rate (26.1%), more residents (41.0%) moved from elsewhere in Australia, and five times more (24.5%) moved from overseas.²⁴

This suggests that the large growth in the City of Adelaide's population is due to the attraction of inner city living for tertiary education, employment opportunities and entertainment, which is likely to continue.²⁵ The largest source of in-migration was from overseas, which also remains the most volatile source as evident in the decline with the COVID-19 pandemic. This decline is expected to be temporary and will likely rebound. Figure 8 presents the net migration by age group in the City of Adelaide for 2021, reflecting that largest gain in the 18 to 24 age cohort (principally tertiary students).

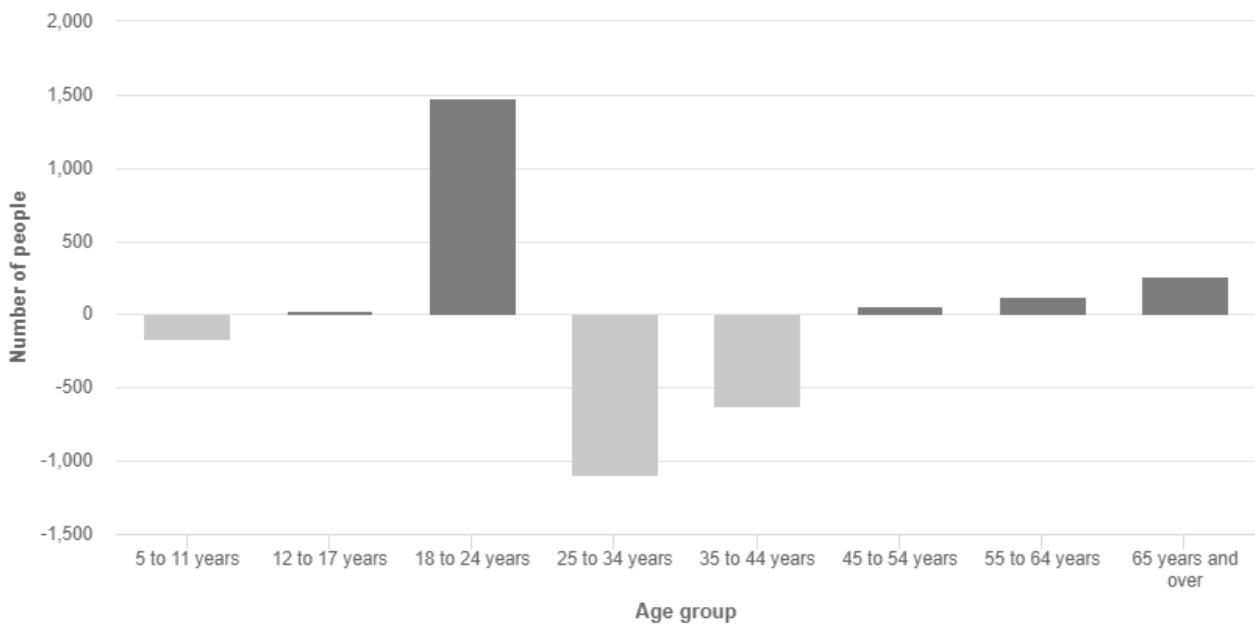


Figure 8 – Net migration by five-year age groups, City of Adelaide 2021²⁶

Figure 9 presents the net migration for the City of Adelaide from 2016 to 2021. The City of Adelaide also attracts people from the outer suburbs of Adelaide, many of these being young people studying or moving to the central city for lifestyle and/or employment reasons. The City of Adelaide has in recent times experienced a net loss of migrants to both Melbourne, Southeast Queensland and to a lesser extent Perth. The City of Adelaide also loses people to inner suburban areas such as Charles Sturt, Prospect and West Torrens. Many of these people are moving further out to find affordable dwellings, trading accessibility for space or to find appropriate housing when the time comes for child-rearing.

In 2019, the Commonwealth Government decided to reduce the Australian Permanent Migration Program intake by 30,000 to 160,000. Migration was then largely halted due to COVID-19 pandemic restrictions with national overseas migration being negative for the first time since 1946. On 2 September 2022, the Australian Government announced that the 2022-23 migration program will increase to 195,000 places.²⁷ The program does not include temporary migration/visas such as students which are likely to also increase.²⁸

In the 2023-24 Federal Budget, population growth at the national level is expected to reach 2% in 2022-23, and 1.7% in 2023-24. Net overseas migration is forecasted to reach 400,000 in 2022-23 and 315,000 in 2023-24, reflecting a once-off catchup, and is likely to soften from 2024-25.²⁹

In 2022, the majority of the city’s annual population growth was driven by overseas migration with a fall in natural increase (births minus deaths) and net internal migration. Although Sydney and Melbourne also experience negative internal migration, natural increase was positive for these capital city councils. In contrast, Perth and Brisbane councils experienced growth in natural increase, net internal migration and net overseas migration.³⁰

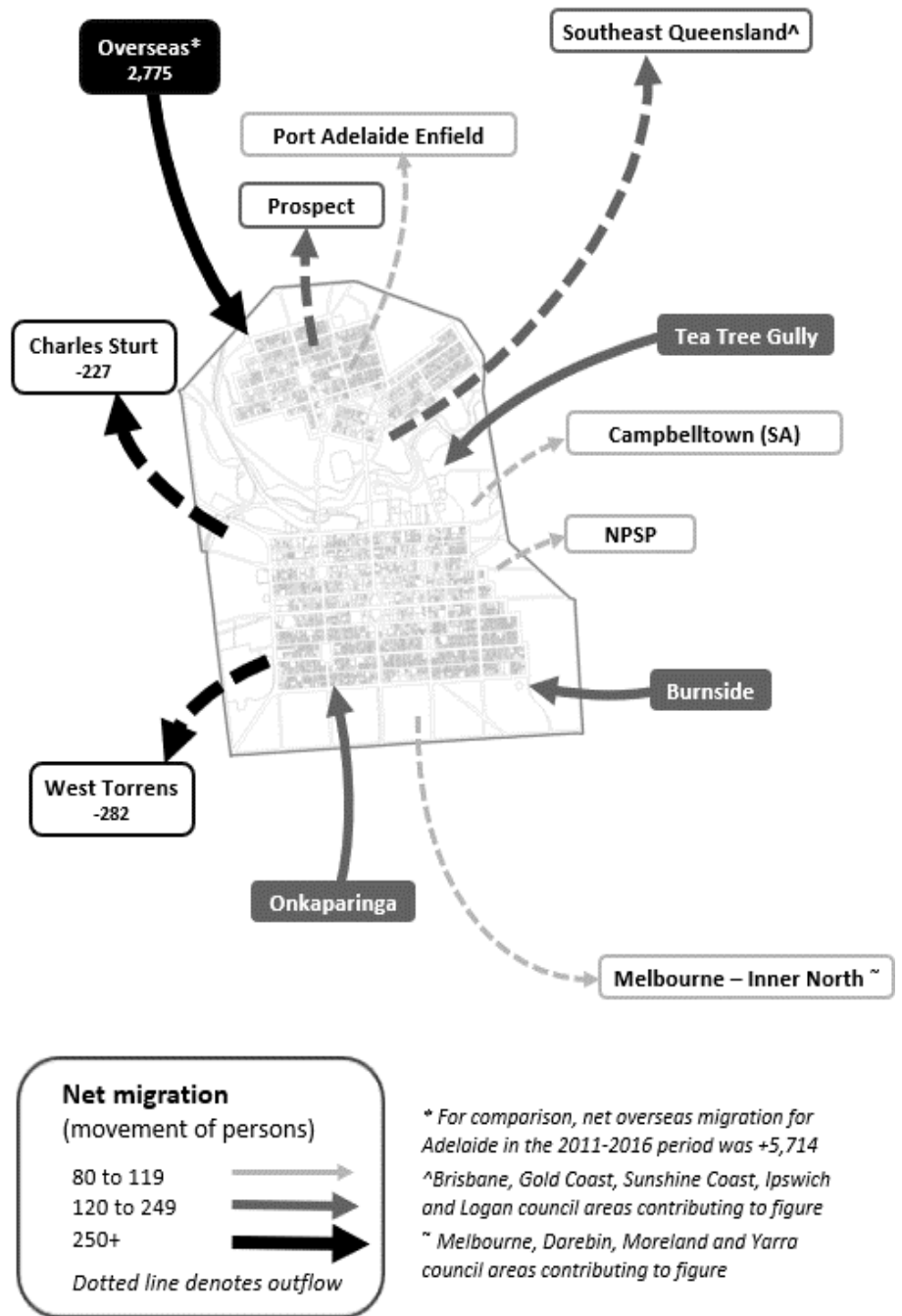


Figure 9 - Net migration flow, City of Adelaide, 2021¹

Policy Implications:

4. Overseas Migration: Between 2016 and 2021, 73.9% of the City of Adelaide's population turned over with one in four migrating from overseas and 4 in 10 migrating from elsewhere in Australia. This suggests the City of Adelaide acts as a demographic entrepot, importing people from overseas and distributing people overseas, interstate and to the inner suburbs of metropolitan Adelaide. Coupled with the dominance of twentysomethings, the City of Adelaide will need to consider the opportunities to plan for long term infrastructure and services.
5. National Migration Policy and Implications: The City of Adelaide will need to consider what the Commonwealth Government's increase to migration levels will likely have, as the City of Adelaide is likely to attract a large proportion of the migrants who come to South Australia and the opportunities that arise out of this.



global challenges

Conflicts and Trade

Meta-modernism’s plural, digitized, post-industrial, global age is resulting in a more fractured world order with challenges for the City of Adelaide. Figure 10 is the World Economic Forum’s Global Risks Report priority list of both short and long-term risks.³¹ At any time, multiple of these will be at play for an individual nation, society, or city.

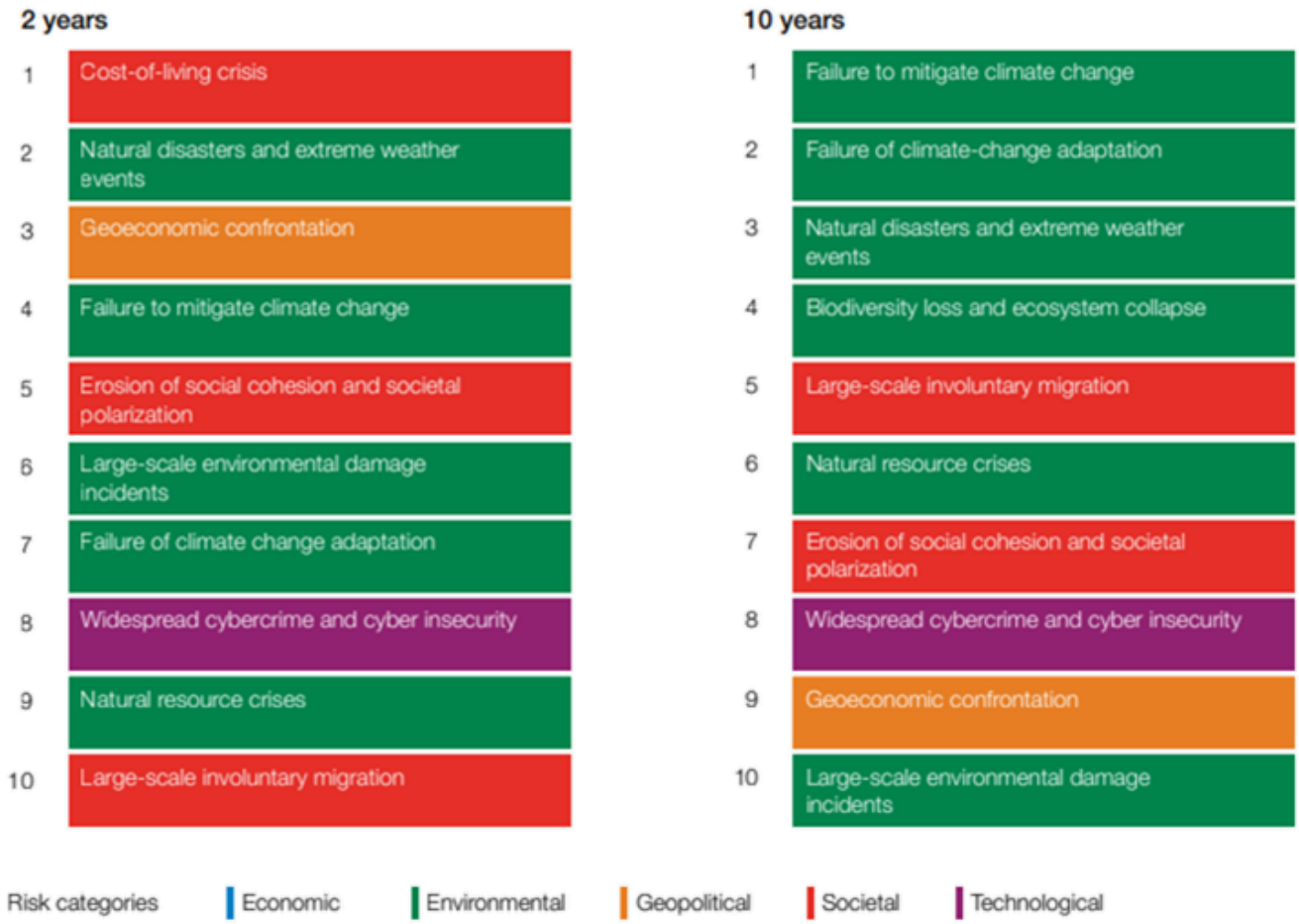


Figure 10 – Global risks ranked by severity over the short and long term³²

The 2023 Group of Seven (G7) gathering included the seven wealthiest democracies – Japan, the United States of America, the United Kingdom, France, Germany, Canada and Italy. But the economic might of the G7 is waning – in 1990, the group accounted for just over half of the world’s GDP, now it’s just under 30%.³³ To increase its relevance the host invited Australia, India, Brazil, South Korea, Vietnam, Indonesia, Comoros (representing the African Union) and the Cook Islands (representing the Pacific Islands Forum). Notably Russia and China were not invited, two countries which have used their money and power to make diplomatic and economic inroads into African, Asian, and the Pacific spheres of influence.

Divisions have already unfolded in the global grab for resources pre-empted by souring diplomatic relations, cyber-attacks, trade wars, power spending on infrastructure to build relations (or dependencies), and increased military spending.³⁴ The ongoing trade stoush between the United States (the broader West) and China goes beyond tariffs and trade barriers, to the arrest of executives, banning of companies, and securing of knowledge talent, technology and resources.³⁵

All this positioning could pre-empt a military conflict with ramifications upon smaller players like Australia (and the City of Adelaide). The Russian invasion of Ukraine has indicated Australia's precursor response of restrictions to diplomacy, migration and trade, rather than direct military intervention. The Ukraine war could threaten to escalate beyond its current sphere further impacting European, the European Union and the North Atlantic Treaty Organisation.

Parallel with this the position of China's hegemony offers a more regional consideration for Australia as it can ignite already tense and historic relations between nations like North Korea, South Korea, Japan, Taiwan, Philippines, Pakistan, and India. India, as a growing regional power which has surpassed China as the most populous nation, has had multiple border conflicts with China over the last 50 years,³⁶ and both are positioning themselves to acquire resources newly exposed by climate change and the deglaciation of the Himalayas.³⁷ This could escalate into a regional conflict between the two most populous and nuclear power nations on earth.

As nations struggle to manage their climate change response, military intervention to manage water security, food security, energy security, uncontrolled refugee flows and acquisition of scarce resources is a greater risk. Any significant regional conflict would paralyse the national economy whether Australia was directly involved, or not as regional trade would cease and may never return to what people are currently accustomed too.³⁸ While some Asian nations sit as Australia's biggest trading partners, in the scheme of things Australia is not their largest trading partners and is separated by cultural differences, which requires consideration of how regional relationships are advanced at the national through to local level.³⁹

In the current global trading economy, there are at least 50 million recognised slaves (twice the population of Australia) which is increasing and exacerbated by poverty induced by war and climate change.⁴⁰ As a corporation with over \$100 million revenue the City of Adelaide is required to comply with the Commonwealth Government's *Modern Slavery Act 2018*, including providing an annual statement of how it combats modern slavery in its global supply chain.⁴¹

The City of Adelaide has a large demographic representation from Asia, in particular, overseas tertiary students especially from China which contribute to the service-based economy. The Australian economy also tends to operate with an assumption that trading partners will always continue to want to trade with Australia when it is as much dependent upon their own internal politics and policy.⁴²

A regional conflict has the potential to not only cease current trade and economic structures but result in internment or even amnesty.⁴³ In any event the embedded Australian approach to multiculturalism would be damaged, potentially irreparably.

Policy Implications:

6. Threats of Global Unrest: A regional conflict is beyond the City of Adelaide sphere of control. However, the City of Adelaide should consider contingency planning for the impacts on trade, the economy and cultural relations as well as identify new opportunities for investment.
7. Human Rights: The City of Adelaide will need to comply with the requirements for a Modern Slavery Act 2018 Statement about its global supply chain.

Climate Change and Zero Emissions

The world is getting warmer and global temperatures are rising. Climatic conditions which were once more consistent are now changing and becoming more erratic resulting in more severe and intense weather events. Droughts, heatwaves, cold snaps, rainfalls, storms, winds and sea level rises threaten human habitat and species extinction.⁴⁴

To adapt to the changing climate and safeguard communities, infrastructure and the economy against future events and conditions, the Commonwealth Government has committed to net zero emissions by 2050. This includes reducing emissions in the industrial, transport, land and agricultural sectors and meeting Australia's commitments as a party to the United Nations Framework Convention on Climate Change.⁴⁵

The State Department for Environment and Water's Climate Change Action Plan speaks to South Australia's climate change challenges and emissions reduction. The Action Plan includes seven focus areas supported by 21 objectives to reduce emissions. These focus areas include: Clean energy transformation;

- Climate smart economy
- Climate smart agriculture, landscapes and habitats
- Low emissions transport
- Climate smart built and urban environments
- Resilient communities
- Government leading by example

Cities have a crucial role to play – both as significant contributors to climate change as well as being home to communities that will have to manage their climate resilience and emissions impacts. In 2015 the State Government and the City of Adelaide committed to a joint aspiration for Adelaide to be the world's first carbon neutral city. This would be achieved by the following:

- Energy efficient built form
- Zero emissions transport
- Towards 100% renewable energy
- Reduce emissions from waste and water
- Offset carbon emissions.

The City of Adelaide achieved carbon neutral certification for its operations for 2019–20 and 2020–21 and is committed to maintaining this certification status⁴⁶. The City of Adelaide is now working with partners to achieve carbon neutrality across the capital city.

Between 2006–07 and 2019–20, the City of Adelaide's residential population grew by 41%, gross regional product increased by 45%, yet the city's overall greenhouse gas emissions decreased by 21%, representing a decoupling between economic growth and increased greenhouse gas emissions ⁴⁷(Figure 11). ⁴⁸

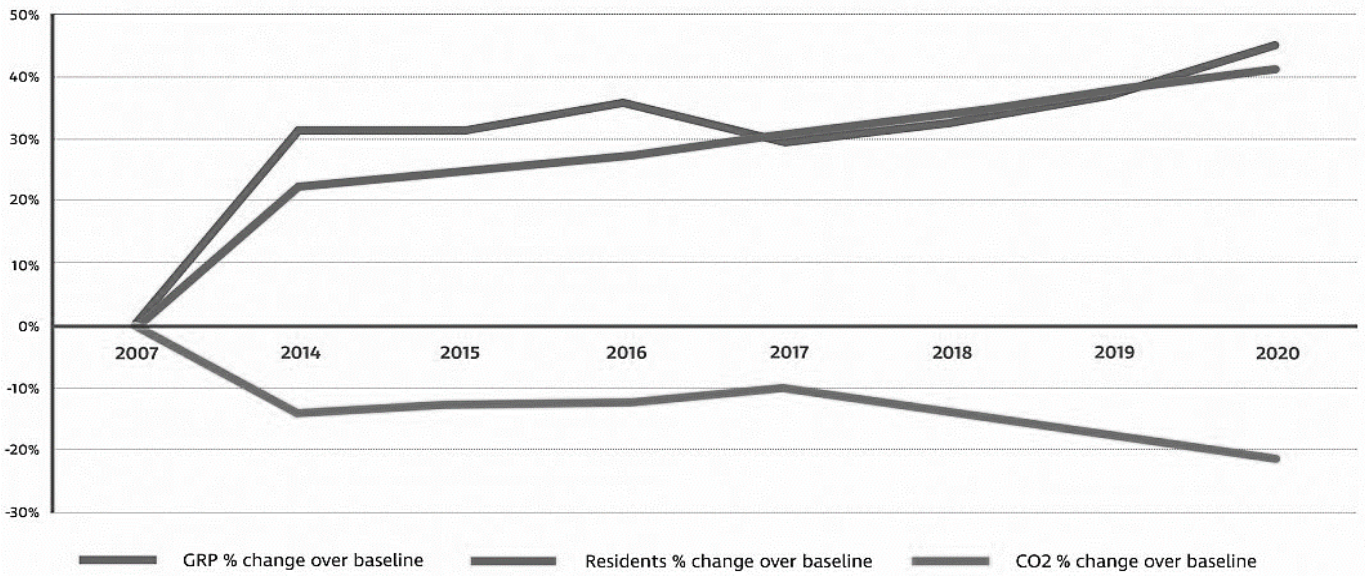


Figure 11 – City of Adelaide emissions trends compared to city growth indicators, 2006-07 to 2019-20⁴⁹

Figure 12 indicates that South Australia’s shift to renewable electricity has had a major impact on the City of Adelaide’s stationary energy emissions footprint. However, other emissions have remained steady or grown due to the dominance of private combustion engine vehicles, and population growth increasing the quantum of refrigerants and waste.

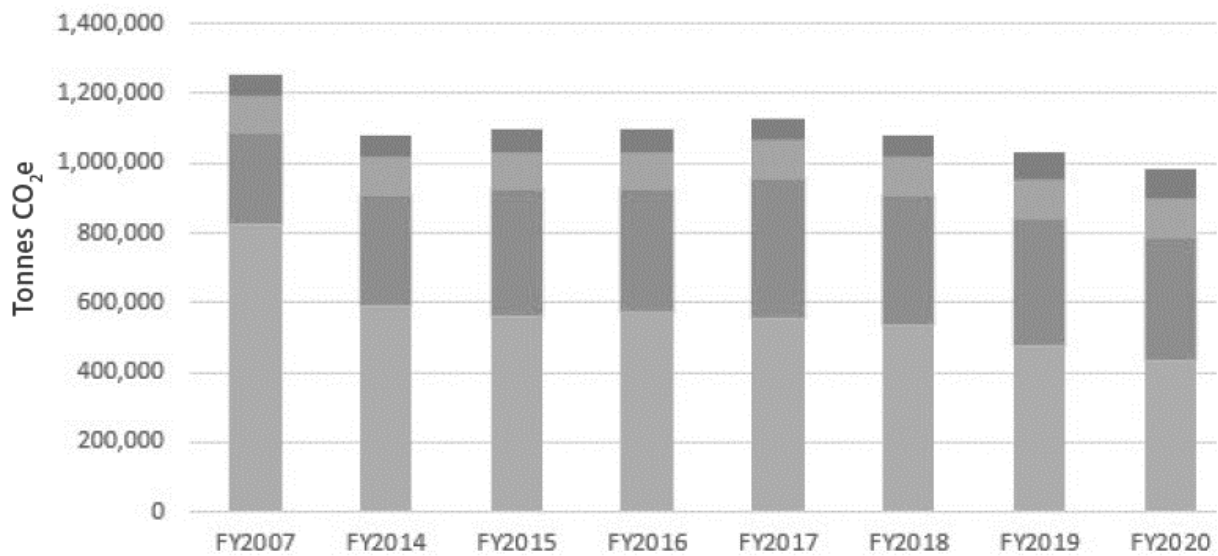


Figure 12 – City of Adelaide Community Greenhouse Gas Emissions, 2006-07 to 2019-20⁵⁰

As outlined in Figure 13, The electricity and gas consumed by buildings (stationary energy) contributed 44% of the City of Adelaide’s carbon footprint. This suggests that there is significant potential for savings by running all-electric buildings on South Australia’s world-leading renewable electricity grid.

Transport emissions accounted for 35% of the City of Adelaide’s carbon footprint. The best outcome for decarbonisation of transport is to create healthier streets and enable more people to walk/wheel, cycle and scoot, use public transport, and to transition the private vehicle fleet to electric.

The Commonwealth Department for Infrastructure, Transport, Regional Development and Local Government is leading the development of an Electric Vehicle Strategy, which is intended to transform the transport sector to net zero emissions and get millions of electric vehicles on the road. Effective implementation of the strategy will require the Commonwealth Government to first introduce a fuel efficiency standard which mandates the carbon dioxide emissions target for all future vehicles, and effectively sets an end-date for petrol and diesel cars. Shifting to electric vehicles provides the opportunity to improve local air quality and public health and reduce noise and carbon emissions.

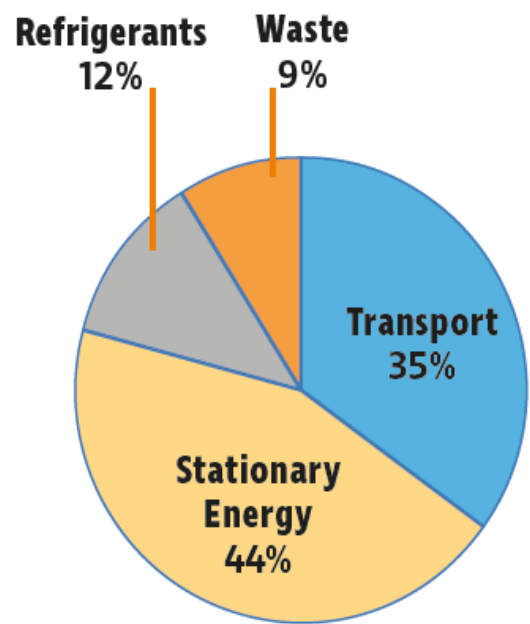


Figure 13 - City of Adelaide emissions composition 2019-20¹

Policy Implications:

8. Climate Change: The City of Adelaide will need to continue to collaborate with the State Government on delivering the South Australian Climate Change Action Plan 2021 – 2025 and emissions reductions, including engagement with business and the community, to successfully transition South Australia to a low and zero emissions future. The City of Adelaide will need to consider actions to support reductions in emissions across waste, refrigerants, stationary energy, and reduced vehicle use and accelerating the shift to electric vehicles.

Water Security

Water is intrinsic to human habitation and survival used for drinking, washing, sanitation and health, through to commercial production and social recreation. The South Australian Department for Environment and Water's, Water Security Statement speaks to South Australia's water security. The Statement includes 10 state level strategic priorities such as climate resilience, ecologically sustainable water resource management, integrated urban water management and growing the SA water sector.

Water has always influenced the culture and creation of Adelaide. Karrawirraparri (River Torrens) was a valuable source of food and fresh water as well as an important travelling corridor and meeting place for the Kaurna people.⁵¹ As a city of over 25,000 residents with forecast for further growth plus hundreds of thousands of daily visitors, water is imperative to the sustainability of the city. The City of Adelaide currently sources most of its potable water from the Murray Darling Basin which remains under severe competition for its resources. Simultaneously the majority of its stormwater and wastewater is allowed to drain westward to the coast.

A water sensitive city is a place where people enjoy reliable and safe water supplies, are protected from flooding, use water resources efficiently, live amongst cool, green landscapes and can connect with healthy, natural ecosystems in an urban environment. In a changing climate, ensuring water security by more effectively sourcing and utilising water resources, and proactively transitioning towards a water sensitive city is an imperative to survival and maintain green spaces, biodiversity, public health and economic productivity.

Policy Implications:

9. Water Security: The City of Adelaide will need to continue to collaborate with the State Government on delivering the South Australian Water Security Statement 2022 to successfully transition South Australia to a sustainable water future.



community and the built form

Post Covid-19 Public Health Emergency

On the 4 May 2023 after three years and almost 7 million recorded deaths globally, the World Health Organisation determined that the COVID-19 pandemic (caused by the coronavirus 2 (SARS-CoV-2) virus) was now an established and ongoing health issue which no longer constituted a public health emergency of international concern.⁵²

South Australia still averages one recorded COVID-19 death a day and will need to manage the chronic quality of life impacts of those suffering from long COVID.⁵³

COVID-19 was not the first pandemic nor regional epidemic, and since the first variants in 2020, COVID-19 has mutated to produce multiple variants and subvariants and has the potential to mutate beyond the capacity of current vaccines.⁵⁴

The potential for further pandemics is likely. With climate change, the defrosting of the Arctic permafrost runs the risk that humans will be exposed to bacterium and viruses which have lain dormant since the last ice age and humans have lost an immune defence against.⁵⁵ Also as seen with COVID-19, speedy international travel means diseases can spread faster and more freely than ever before. Furthermore the world's population, which ticked over to 8 billion continues to become more urbanised and by 2050 it is expected that 80% of the human population will be living in urban environments.⁵⁶ Without effective public health measures, history has shown when communicable disease spreads into dense urban areas, fatalities follow.

In Australia, city central business districts struggled with the COVID-19 public health emergency and the notion things will return to pre-pandemic business models and lifestyles unchanged is archaic. Office occupancy rates are still below 2019 levels, overseas tourism is still lower than its peaks, there are still labour and supply chain issues across sectors, and fundamentally there remains a public health risk which sections of the population treat cautiously.⁵⁷ COVID-19 accelerated an economic and social evolution including purchasing online and working from home and city centres will need to evolve to remain relevant.

Policy Implications:

10. Public Health Management: The City of Adelaide will need to consider what lessons it learnt from the COVID-19 public health emergency and how it can effectively risk manage future pandemics and public health concerns within a more populous and denser urban environment. The City of Adelaide will also need to consider a reimaged role for the city in an environment where working from home is more prevalent.

Wellbeing and Public Health

Living with chronic illness is becoming more common with 47.3% of adults nationally reporting having one or more chronic illnesses in 2017-18⁵⁸. In 2022, the five disease groups causing the most burden across Australia were cancer, musculoskeletal conditions, cardiovascular diseases, mental health conditions and substance use disorders, and neurological conditions. Together these disease groups include mostly chronic, or long-lasting, conditions and accounted for around two-thirds (62%) of the total burden of disease.⁵⁹

In the 2021 Census 26.0% of the City of Adelaide population reported a long-term health condition, compared with 34.5% for Greater Adelaide. Figure 14 indicates the types of long-term health conditions of the City of Adelaide resident population. Chronic health conditions which are strongly correlated with older age, (such as arthritis, heart disease or dementia) are lower in Adelaide due to its younger population. However, one in four residents still reported a condition with mental health being the most common representing 9% of the population and usually co-occurs with a substance use disorder.⁶⁰

As two of the disease groups causing the most burden in Australia, cancer and cardiovascular disease along with asthma, are all long-term health conditions with high levels of mortality and morbidity. Recent studies have assisted in linking all three to air pollution⁶¹ and there are early indications that deaths from air pollution in Australia could be 10 times more likely than a fatal road accident.⁶²

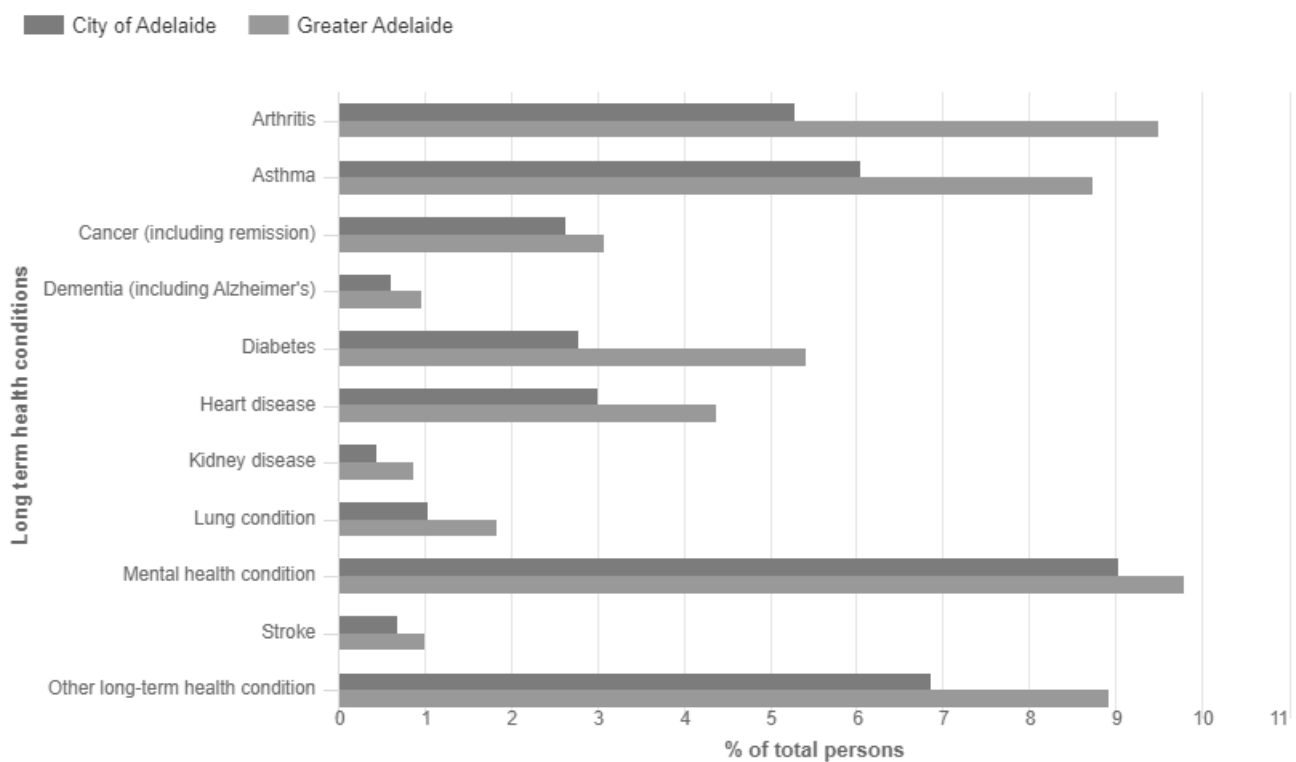


Figure 14 – Long-term health conditions, City of Adelaide, 2021⁶³

As 99% of people in the world live in places where air pollution exceeds the WHO guidelines⁶⁴ air pollution is a public health issue. Since the banning of incinerators in metropolitan Adelaide under the *Environment Protection Act 1993*, combustion engine traffic remains the primary source of air pollution in Australian cities.⁶⁵ With the City of Adelaide at the centre of metropolitan Adelaide, air pollution is a public health issue needing addressing through the reduction in combustion vehicle use.

The South Australian Government's Department for Health and Wellbeing already has three plans which have implication upon the City of Adelaide. The Department for Health and Wellbeing's State Public Health Plan identifies four public health priorities being:

1. Promote – Build stronger communities and healthier environments.
2. Protect – Protect against public and environmental, health risks and respond to climate change.
3. Prevent – Prevent chronic disease, communicable disease and injury.
4. Progress – Strengthen the systems that support public health and wellbeing.

Sections 51 and 52 of the *Public Health Act 2011 (SA)* require each local council in South Australia to prepare, maintain and report on a Regional Public Health Plan that is consistent with the State Health Plan and response to public health challenges within their local area.

The Department for Health and Wellbeing's, Health and Wellbeing Strategy is a plan for improving the South Australian public health system. Whilst the Health and Wellbeing Strategy is focussed on the performance of public health system, it does contain two goals relevant to local government and intersecting with the State Public Health Plan. These two goals being:

- Reduce the incidence of preventable illness, injury and disability.
- Improve individual and community capability in managing their health and wellbeing.

The Department for Health and Wellbeing's, Plan for Ageing Well outlines the State Government three priorities for ageing well with an increasing elderly population. The priorities being:

1. Home and community – Homes and communities enable flexibility and choice, and support us to live how we choose, no matter our age, needs, wants and desires.
2. Meaningful connections – A future where everyone has the opportunity, support and encouragement to maintain and develop meaningful connections.
3. Navigating change – A future where we all have the capabilities and support for remaining active participants throughout all life's transitions.

The 2021 Census reported that within the City of Adelaide there were 3.4% needing assistance with core activities, compared with 6.6% for Greater Adelaide. Those over 70 years of age remain the most prevalent age cohort requiring assistance.

Australia is a signatory to the United Nations *Convention on the Rights of Persons with Disabilities and Optional Protocol* which states "Persons with disabilities include those who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others".

In 2018 there were 4.4 million Australians with disability or 17.7% of the population.⁶⁶ If this proportion was applied to the City of Adelaide, this would equate to over 4,500 residents. The 2021 Census indicated that 850 residents required assistance with core activities while a further 1,855 residents acted as unpaid carers to a person with a disability, long term illness or old age.

Perceptions of safety or perceived safety refers to an individual's subjective level of safety and their perception of risk. The City of Adelaide undertakes regular City User Profile Surveys to help monitor the profile of city users and gauge how safe or unsafe they feel in the city. In 2022, and consistent with previous results, most surveyed city users felt 'very safe' or 'quite safe' during the day. As it gets later however, surveyed city users were less inclined to be in the city. Visitors were less likely to use the city from 5pm onwards compared to workers and students. Women were more likely to feel unsafe in the evenings and less inclined to come into the city at night. Vulnerable groups like children, the elderly and the disabled would also be restricted in their visitation to the City of Adelaide by perceived and actual barriers to their inclusion.

The Department of Prime Minister and Cabinet is overseeing the Commonwealth Government's development of a National Strategy for the Care and Support Economy. These sectors provide essential services to some of the most vulnerable people in society. They enable workforce participation of people otherwise unable to work due to caring responsibilities. The strategy, to be delivered by 30 June 2023, will address the goal of a sustainable and productive care and support economy that delivers quality care and decent jobs.⁶⁷

Policy Implications:

11. Environmental Health: The City of Adelaide needs to consider how it can contribute to reducing traffic pollution and combustion vehicle use and emissions, given the public health imperative, in addition to the greenhouse gas reduction and zero emission imperatives.
12. Public health planning: The Public Health Act 2011 (SA) requires local government to have regional public health plans which identify and address public health issues, including responding to the burden of disease, and inclusion of vulnerable groups.
13. Diversity, Access and Inclusion: The City of Adelaide has and will continue to have a small proportion of vulnerable resident who are disabled and/or at either end of the age spectrum, being children, or seniors and elderly; in contrast to a metropolitan area with a larger proportion of children, and the elderly population forecast for metropolitan Adelaide, South Australia and Australia. The City of Adelaide will need to consider a universal design and urban form which accommodates these vulnerable groups by being disabled, child and elderly friendly especially as a capital city which wishes to attract visitors and have robust housing stock.

Housing

The 2021 Census reported that individuals' weekly incomes are polarised within the City of Adelaide where 14.2% of the population earned a high income (\$2,000 per week or more), and 33.6% earned a low income (less than \$500 per week), compared with 9.9% and 34.0% respectively for Greater Adelaide. Geographically, North Adelaide had a greater representation of higher incomes and Adelaide had a greater portion of lower incomes.

Figure 15 presents the household tenure within the City of Adelaide in 2021 in comparison with Greater Adelaide. The three largest tenure types were renting privately 49.9%, fully owned 20.1%, and owned with a mortgage 14.7% which is a reversal of the housing tenure experience for Greater Adelaide which represents 22.1%, 30.1% and 36.1% respectively. Across Australia, the proportion of households that were renting was 29.5%, fully owned 29.9% and owned with a mortgage 33.2%, which is more in line with the trends at the State level.

According to the 2021 Census, renting represented 56.5% of the City of Adelaide housing tenure and is growing at more than twice the rate of fully owned and mortgage tenures combined. As established housing stock enters the market, it is likely to become either rental tenure or attract high end owners with a large mortgage. Census data suggests that housing ownership within the City of Adelaide is likely to become a reality for only a narrow demographic. Between the 2016 and 2021 censuses the total number of households in City of Adelaide increased by 2,081 or 20% while the total number of households renting their dwelling increased by 1,613.

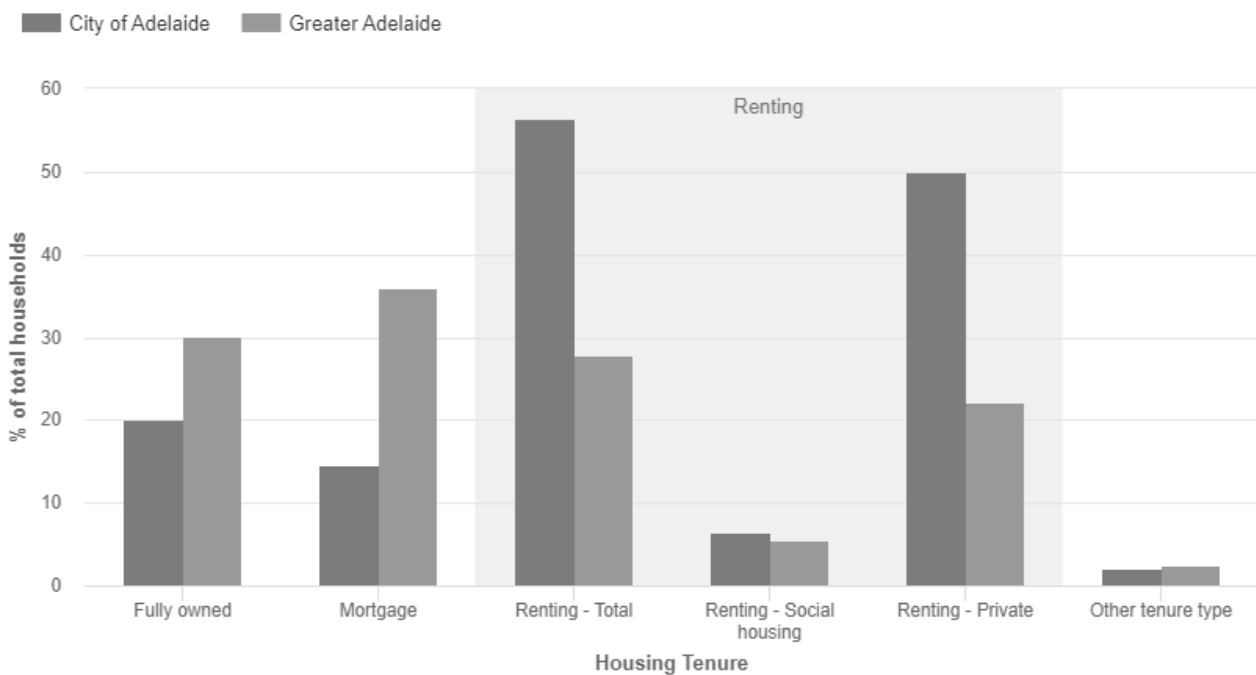


Figure 15 – Housing tenure City of Adelaide, Greater Adelaide, 2021⁶⁸

The 2021 Census indicated that the three largest household types within the City of Adelaide in 2021 were lone persons (40.8%), couples without children (25.6%), and group households (11.4%). Within the City of Adelaide there was a lower proportion of couple families with children (8%) and one-parent families (4.5%), totalling 12.5%, compared with 39.9% (28.6% and 11.3% respectively) for Greater Adelaide. Nationally, couple families with children accounted for 29.7% of all households while single parent families accounted for 10.5%. Between the 2016 and 2021 censuses largest changes in household types in City of Adelaide were lone person (+1,373 households), and couples without children (+816 households).

Ninety nine percent of new dwellings in the City of Adelaide between the 1991 and 2021 censuses constituted high density (+6,966 dwellings or 77%), and medium density (+2,003 dwellings or 22%).

Furthermore, in contrast to Greater Adelaide and Australia which is dominated by dwellings with three or more bedrooms (around 75.0%); the City of Adelaide is dominated by dwellings with two bedrooms or less (68.6%).

Figure 16 presents the forecast household types within the City of Adelaide to 2041. The forecasted population increase for the City of Adelaide means there will be growth across all household types. However lone persons, couples without children and group households are forecasted to receive the largest portions of that growth and remain the largest household types.

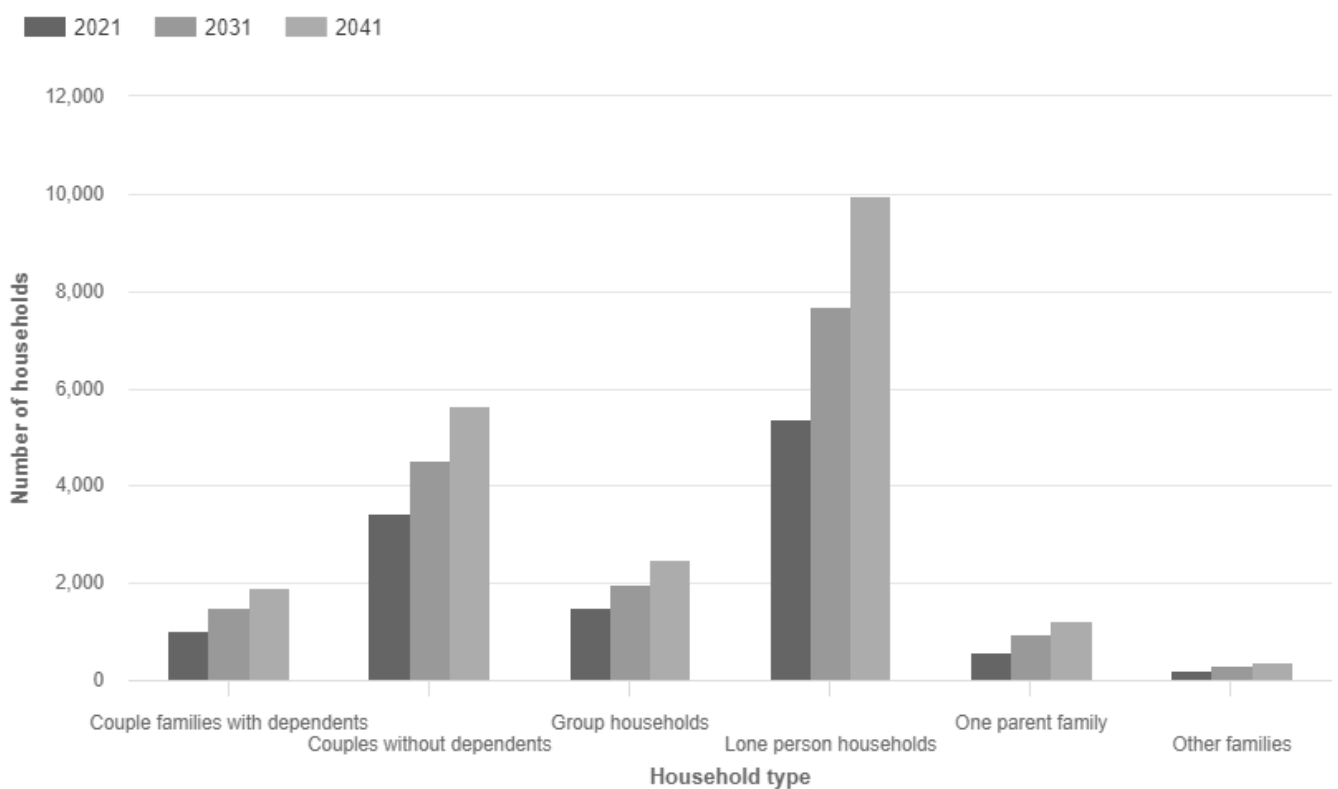


Figure 16 – Forecast housing tenure, City of Adelaide, 2021 to 2041⁶⁹

The South Australian Housing Authority’s Housing Future 2020–2030 includes five strategic priorities which are supported by actions and aims to redefine and reform the housing system in South Australia. The strategies priorities are:

1. Create conditions for a well-functioning housing market that meets the housing needs of all South Australians.
2. Reduce housing stress through 20,000 affordable housing solutions.
3. Create housing pathways to enable people to access housing and services as their needs change.
4. Prevent and reduce homelessness through targeted and tailored responses.
5. Modernise the social housing system and reposition it for success.

With currently over 25,000 residents out of 1.3 million within metropolitan Adelaide, coupled with high property values, a narrower range of housing stock, and more substantial influence by other governments and the private sector; the City of Adelaide’s contribution to housing is minor. A particular challenge for forward planning is the volatility of the housing market. Due to the size of construction projects, several factors influence when dwellings are constructed and then available for habitation. These include the investor market, general economic conditions (particularly finance from lending institutions) and policy shifts at both the local and national scale.

The types of dwellings constructed in the City of Adelaide over recent years goes some way to determining the types of households. Most construction has been in the form of higher density apartment buildings, which typically consist of one or two bedrooms. These types of dwellings are more suited to smaller households, and as such the housing market has been dominated by couples only or lone person households. Notions about “empty nester” demand for inner city living in high density apartments are largely unsupported by data analysis.⁷⁰ The suburb of Adelaide will add the most dwellings over the forecast period, with comparatively little development in North Adelaide.

As a capital city, the City of Adelaide has higher rates of homelessness, including temporary homelessness, partly due to the centralisation of services, and transitory marginalised communities who visit for appointments, cultural events or to visit family and friends. The 2021 Census reported 398 people experiencing homelessness in the City of Adelaide.⁷¹ The extent of homelessness requires more frequent data than the five yearly census. In March 2023, Adelaide Zero Project reported 235 ‘actively homeless’ people, which was an increase from 204 in February 2023. However, there was a reduction in newly identified people sleeping rough for the first time. Figure 17 identifies the inflow and outflow fluctuations of active homelessness in Adelaide’s inner city.

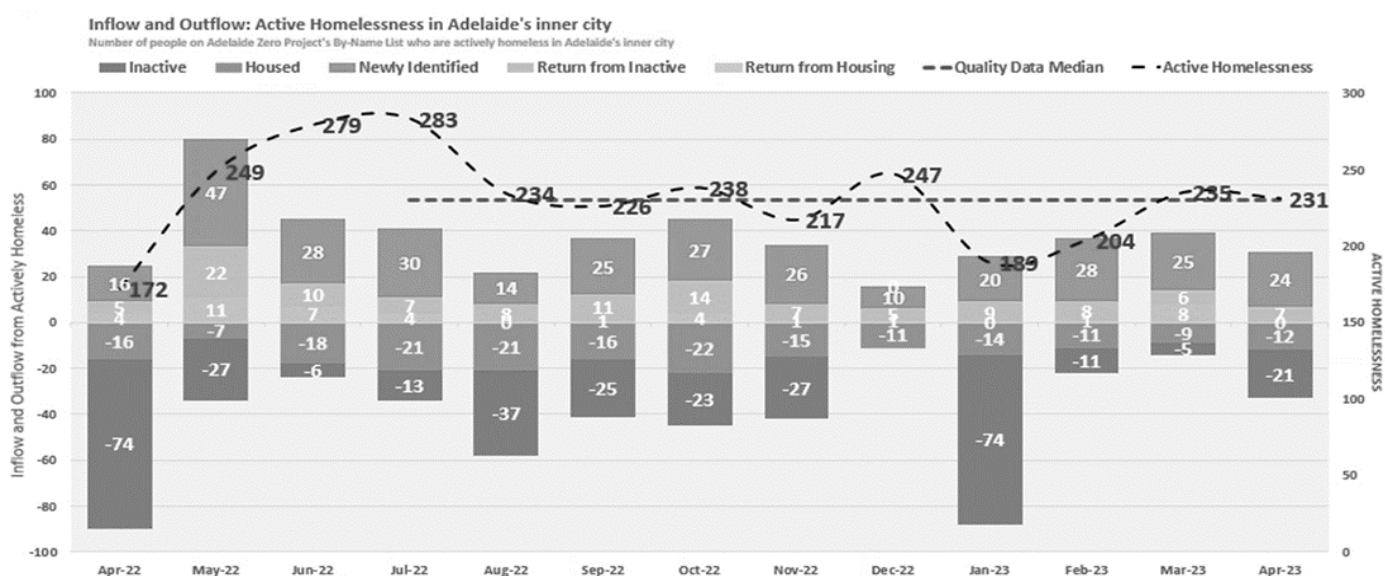


Figure 17 – Inflow and outflow: Active homelessness in Adelaide’s inner city⁷²

Policy Implications:

14. Income and wealth distribution: The City of Adelaide's population is economically polarised between those earning the highest incomes and those earning the lowest or nil incomes; and those owning or with mortgage, and those renting. This polarisation is reflected spatially with North Adelaide having a greater representation of higher incomes, and home ownership and Adelaide having a greater portion of lower incomes and renting.
15. Housing Density: Ninety nine percent (99%) of dwelling construction over the past 30 years has been in the form of high or medium density apartment buildings. The City of Adelaide will need to consider that the forecasted population growth is likely to be higher density apartments within the suburb of Adelaide, accommodating lone persons and couples without children, and the opportunities that arise from this.
16. State Housing Policy: The City of Adelaide will need to consider the role it wishes to play in supporting the South Australian Housing Authority's Housing Future 2020-2030, housing priorities, housing affordability, and homelessness.

City Layout, Landscape, and Park Lands

PlanSA administer the 30 Year Plan for Greater Adelaide which guides amendments to statutory planning policy against which development applications are assessed. The 30 Year Plan was last updated in 2017 and includes six targets outlining how metropolitan Adelaide should grow to become more liveable, competitive, and sustainable. The six targets are:

1. Containing our urban footprint and protecting our resources
2. More ways to get around
3. Getting active
4. Walkable neighbourhoods
5. A green liveable city
6. Greater housing choice.

The 30 Year Plan includes 15 policy sections ranging from heritage, housing, transport, climate change; and a specific policy section relating to Adelaide city centre to ensure it is “the heart of our state’s civic, cultural and commercial life and we aim to have more people living, working, visiting and investing there.” The Adelaide city centre policies are listed in Appendix A and cover strengthening the role of the Capital city, strengthening the historic street grid pattern, boulevards, squares and parklands, sustaining heritage and character, encouraging taller building in the centre and around squares and parklands, increasing the vibrancy of the public realm, and increasing housing diversity.

The 2010 version of the 30 Year Plan included specific regional targets section including a population growth target for the Adelaide city centre. This has since been removed from the 2017 version. Consequently, the State Government has no official policy position for the residential growth of the Adelaide City centre.

Population forecasting indicates that the City of Adelaide is likely to have one of the fastest South Australian growth rates of an additional 17,374 residents by 2041, which will largely be located in high density apartments.⁷³ Additional high-density apartments for the forecasted 17,374 population will impact the City of Adelaide’s service provision and alter the built form. The current tallest residential dwelling, the Adelaidean (27 Frome Street) accommodates at capacity 492 bedrooms across 36-storeys. Assuming full occupancy, the forecast growth of 17,374 would require an additional 36 36-storey residential buildings.⁷⁴

Under the *Landscape South Australia Act 2019*, Green Adelaide is a statutory board, that must prepare a five-year Regional Landscape Plan to create a cooler, greener, wilder and climate-resilient Adelaide. Green Adelaide is funded by a landscape levy collected by Local Governments. The Regional Landscape Plan has seven priorities (listed in Table 1) with supporting key focus areas and outcomes.

Table 1 – Green Adelaide, Regional Landscape Plan's Seven Priorities⁷⁵

1. Biodiversity sensitive and water sensitive urban design	We will build industry and community capacity to design cooler, greener and nature-friendly developments and infrastructure.
2. Coastal Management	We will conserve and restore Adelaide's unique coastline to benefit our way of life, our economy and provide vital habitat for native plants and animals.
3. Fauna, flora and ecosystem health in the urban environment	We will create more urban spaces for plants and animals to thrive in which in turn provides people a better quality of life.
4. Water resources and wetlands	We will protect, enhance and restore Adelaide's water resources (our rivers, wetlands and lakes) to help preserve these essential ecosystems and the wildlife that call them home.
5. Controlling pest animals and plants	We will help coordinate management of invasive pests to support an Adelaide that is rich with healthy biodiversity.
6. Green streets and flourishing parklands	We will increase tree canopy cover and green spaces to create cooler urban areas that encourage biodiversity and improve community health and wellbeing.
7. Nature education	We will grow nature and sustainability education in Adelaide to support children and adults to connect with the environment.

Greener spaces deliver benefits to the economy, character and biodiversity, as well as improving the health, wellbeing, safety and socialisation of people. This makes the city a more enjoyable place. Importantly, greening is one of the most important ways for cities to adapt to climate change. Greening acts as a carbon store, helps make streets more comfortable for pedestrians by reducing the urban 'heat island effect', and creates micro-climates so buildings use less energy for cooling, in turn reducing emissions. The opportunity for the City of Adelaide to become a low carbon green precinct to guide sustainable urban development and investment decisions offers a competitive advantage.

The heritage listed Park Lands surrounding Adelaide and North Adelaide is renowned for its contribution to the quality of life for both city and metropolitan Adelaide residents. While the park lands offer accessible green open space, the public realm of streetscapes and local parks also play a significant greening role. Valuing and managing green urban assets and planning for the future of urban greening, contributes to being more resilient in the face of climate change and maintaining the liveability of the City of Adelaide.

The 1837 Adelaide Plan designed by Colonel William Light was defined by the gridded city layout with its city squares and encircling Park Lands epitomising the archetypal nineteenth century parkland town. The Adelaide city layout and Park Lands has been on the National Heritage list since 2008 as it signifies a turning point in the European occupation of Australia by being planned for and developed by free settlers, and not as a penal settlement or military outpost. The enduring legacy of the 1837 Adelaide Plan continues today by shaping the city and Park Lands.⁷⁶

The City of Adelaide, in partnership with Adelaide Hills, is developing a bid seeking United Nations Educational, Scientific and Cultural Organization (UNESCO) World Heritage Status of the Adelaide and Rural Settlement Landscape. With State Government support, Local Government partners are pursuing a World Heritage Tentative Listing Submission

A World Heritage Listing recognises an area as a living space that will change and evolve over time whilst ensuring the heritage values are respected for present and future generations. While every World Heritage Listing is different, numerous studies have shown socio-economic benefits related to this status.^{77 78} These benefits are often related to the actions and investments of local stakeholders in working towards and maintaining World Heritage Listing, rather than the listing itself.

The City of Adelaide's built heritage is a distinguishing feature and impacts on the city's identity, character and appeal. Built heritage has synergies with the economy, society and culture and can be a key contributor to the prosperity, vibrancy and liveability of the city. The potential for heritage buildings to attract tourism, enhance the amenity and attractiveness of the city, and encourage economic development is significant.

The potential for heritage to provide economic dividends has led the South Australian Government to develop a 10-year strategy for heritage tourism. The purpose of the strategy is to maximise the tourism potential of the State's heritage through the themes of 'connect', 'lead' and 'conserve'.

- *'Connect' actions* seek to deepen the visitor experience by making genuine connections for visitors.
- *'Lead' refers to the need for leadership from government, industry and the heritage sectors to collaborate and provide a seamless heritage experience for visitors.*
- *'Conserve' focusses on positive conservation outcomes such as repurposing heritage for tourism activities.*⁷⁹

Built heritage is commonly accepted as being of great value to cities and societies. More recently, built heritage has been increasingly recognised for its contribution to sustainable development as seen through a range of protection affordable to heritage sites at a local, state, and Commonwealth level.

The City of Adelaide is rich in built heritage with close to 2,500 State and Local Heritage Places located in the city. A 2018 study conducted on the economic value of heritage in the city identified that heritage assets contributed approximately \$400 million for South Australia and supported around 3,000 jobs a year. This is clear indication that the built heritage of the City of Adelaide is a vital asset for the both the municipality and the State.⁸⁰

The Park Lands are publicly accessible open spaces with diverse uses including formal and informal recreation, community events, education, economic activities, biodiversity preservation and conservation, carbon stores, and nature appreciation.

The Park Lands are sensitive to the effects of climate change. The landscape has evolved over time in a certain climate specifically defined by maximum and minimum temperatures, temperature extremes, and rainfall. These in turn directly affect growing conditions such as soil quality, water supply and the suitability of plant species. Climate change will significantly impact the survival of existing plantings and the sustainability of landscape. There is an opportunity to address these issues to ensure the long-term sustainability of the Park Lands making them climate resilient. Climate change will also place greater pressure on the Park Lands to provide relief from the 'heat island' effect and extreme weather events like heat waves. Green spaces and tree canopies are essential in countering the 'heat island' effects and extreme events, and the Park Lands play a key role in ensuring a sustainable, liveable city which not only provides health benefits to the wider population but also provides habitat for flora and fauna.

Policy Implications:

17. Planning and Built Form: The 30 Year Plan for Greater Adelaide released in 2017 sets the policy direction against which the Residential Design Code must be consistent. The Residential Design Code is the statutory policy against which development applications are assessed. The City of Adelaide needs to ensure the Residential Design Code policy reflects the policy direction of the 30 Year Plan for Greater Adelaide.

18. Conservation of Built and Natural Heritage: Given the cultural, heritage, economic, social and environmental value of the 1837 Adelaide Plan and its living landscape, the City of Adelaide will need to consider the legal and planning frameworks to ensure effective conservation and ongoing management against competing interests. There are also opportunities to identify how the economic, social and cultural capital of the city could be further leveraged to benefit the community.

Hazard Management

Climate change modelling indicates that the likelihood, intensity and severity of the risk of flooding will increase. Furthermore, water security is becoming increasingly relevant. This includes reduced and more efficient water use as well as capture, storage and reuse of stormwater which was once considered a waste but now is a resource.

Schedule 1A of the *Local Government Act 1999 (SA)* provides a legal framework for cross-council boundary stormwater management. Through this, the City of Adelaide is a collaborator in a regional subsidiary board to deliver the Brown Hill Keswick Creek Stormwater Management Plan. The Brown Hill Keswick Creek Catchment is only a small southern portion of the City of Adelaide. Most of the City of Adelaide drains into the River Torrens Catchment. There currently is no stormwater management plan for the River Torrens Catchment.

Under the *Fire and Emergency Services Act 2005 (SA)*, the Department for Environment and Water as a landholder and custodian, has a responsibility to prevent or inhibit the outbreak/spread of bushfire, protect property and minimise the threat to human life from fire in South Australian parks and on Crown land.

Although not statutory documents; fire management plans help plan and implement strategies to manage fire risk. The State Government priorities to green Adelaide, restore multi-tiered landscapes, mass plantings to tackle climate change, in addition to the enhanced impact of climate change resulting in drying and hotter conditions means there will be increased bushfire hazard risk to the City of Adelaide Park Lands.⁸¹ The Metropolitan Fire Service is responsible for the protection of the South Australian community from the effects of fires and other emergencies.

Heatwaves are currently the largest natural hazard killer of Australians.⁸² The impact of climate change is forecast to increase the likelihood, intensity and severity of heatwaves experienced in the City of Adelaide and that this will become the norm.⁸³ Identifying opportunities to further foster climate resilient communities is one of the ways that the City of Adelaide could respond.

Policy Implications:

19. Stormwater Management and Water Security: Given the impact of climate change and the need to more effectively manage water security across the State, the City of Adelaide will need to consider better managing stormwater as a resource across the city and the opportunities that arise from this in conjunction with other local government areas within the same catchments.
20. Fire hazards and management: The City of Adelaide is forecasted to have one of the fastest population growth rates in the next 20 years which will be substantially located in high density residential development; and have considerable natural environment restoration within the Park Lands to combat climate change. Both will increase the risk of bush and residential fires which will place greater pressure on emergency services to be effectively trained and resourced to respond. The City of Adelaide's first response should be to incorporate fire management planning, as outlined by the Department for Environment and Water, into the City of Adelaide's Management Plans to help identify, implement and monitor risk management strategies.
21. Urban Heat Island Effect: Given the forecasted residential development for the City of Adelaide, it is imperative to consider both building and public realm design to mitigate and counter the impacts of severe heat upon both assets, residents and visitors.

culture and economy



Kaurna and First Nations

In late 2023 the Australian Government will undertake a referendum to recognise First Nations peoples in the Commonwealth of Australia's Constitution by establishing a First Nations Voice to Parliament and Government.

The Voice to Parliament seeks to address the long-standing marginalisation of the First Nations peoples by including them in the country's democratic process and provide a formal advisory role in shaping policies and legislation that directly affect indigenous communities.

In 1948 Australia became an inaugural signatory to the United Nations Universal Declaration of Human Rights, through which Australia is a signatory to seven core international human rights treaties.⁸⁴ This was the precursor to the embodiment of inclusion and acceptance in a raft of domestic equally opportunity and protection legislation.

Global tracking has noticed in recent years a narrowing of human rights in Australia with expanded government surveillance, prosecution of whistleblowers, raids on media organisations, and most recently restriction on peaceful protests.⁸⁵

In September 2022 the UN Human Rights Committee found that Australia's failure to adequately protect Indigenous Torres Strait Islanders against impacts from climate change violated their rights to enjoy their culture and be free from arbitrary interference with their private life, family and home. This continued failure of maintaining human rights on a number of fronts including, treatment of asylum seekers, children being detained (including an over representation of First Nations'),⁸⁶ and discrimination against First Nations People including their over representation in the criminal justice system.⁸⁷

According to the 2021 Census data, there were a total of 339 person who identified as an Aboriginal or Torres Strait Islander. This represents a share of 1.4% of the total resident population, which is slightly lower than the share at the state level (2.4%).⁸⁸

Currently the City of Adelaide has a Reconciliation Committee and a Reconciliation Action Plan.

Culture

In 2021 the three largest ancestries of residents in the City of Adelaide were English, Chinese and Australian (Figure 18). Those of Chinese ancestry represented 20% of the City of Adelaide population, five times the share of Greater Adelaide. In comparison, the City of Adelaide had lower proportions of those from English and Australian ancestries. The majority (52%) of overseas born residents arrived since 2016; 33.2% of Adelaide residents were bilingual with Mandarin 13.7% and Cantonese (3.3%) being the two main languages spoken at home other than English.

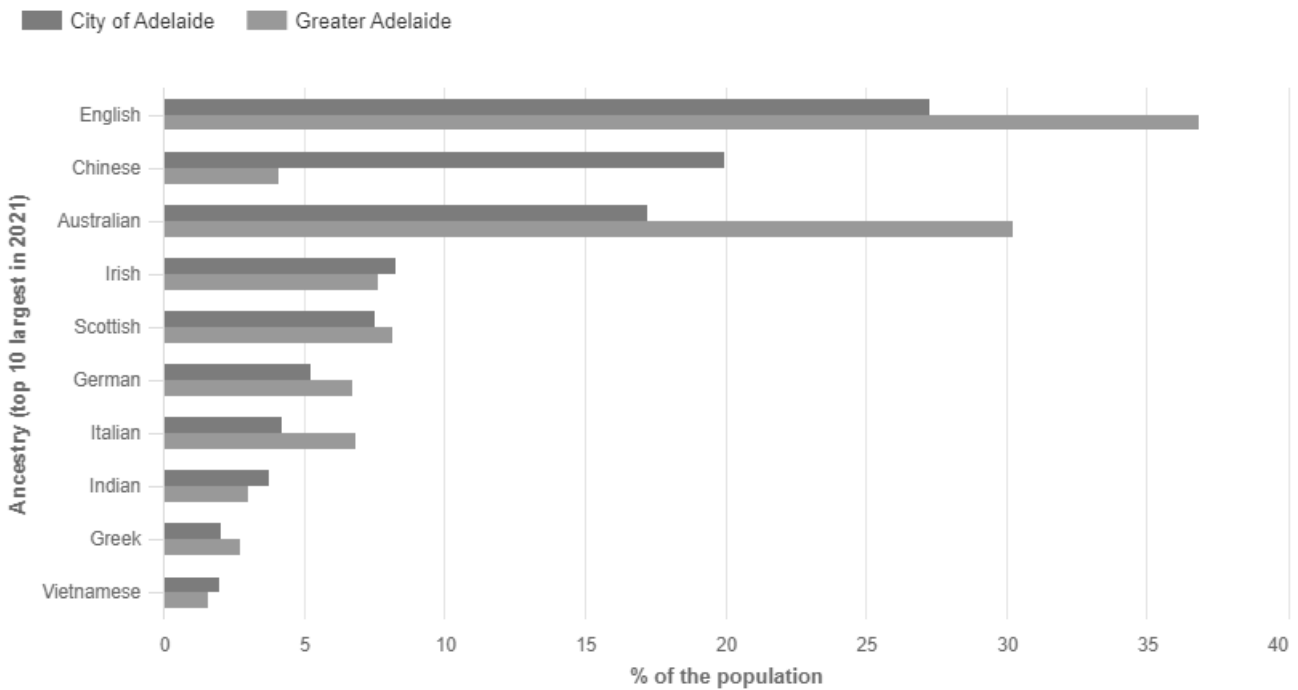


Figure 18 – Comparison of ancestry – City of Adelaide and Greater Adelaide⁸⁹

In contrast, the top three ancestries for Australia were English (33%), Australian (30%) and Irish (9.5%) with only 5.5% of Australians identifying as being of Chinese heritage. While Mandarin was also the most common language used at home (other than English), Arabic was the second most common language spoken at home while Cantonese was ranked fourth.⁹⁰

Policy Implications:

22. Dividends From Cultural Diversity: Just as the City of Adelaide's strong English and Australian connections have supported social and economic collaboration across Australia and within the United Kingdom, Commonwealth and English-speaking countries; the City of Adelaide should consider its strong cultural connection with east Asia which presents an opportunity for further social, economic, and cultural diversification.
23. Voice to Parliament: As the South Australian capital city and a sector leader, the City of Adelaide should consider the impact of the Voice referendum and its relationship with the State Government to better address First Nation human rights concerns.
24. First Nations and Reconciliation: The City of Adelaide should consider how to better embed reconciliation into business as usual and how First Nation representation could be incorporated into the next Representation Review to further reconciliation.

Education, Knowledge and Innovation

Engagement in education and levels of qualifications represent human capital, that is the economic and social value of a persons' skills and experience⁹¹ available to drive growth. Qualifications are an indicator of current human capital while participation in education is an indicator of the future pool of available human capital. In addition to the productivity gains derived from a more educated workforce, it also facilitates innovation where advanced education in areas such as science, digital technology and medicine has contributed to technological breakthroughs.⁹²

Within the City of Adelaide there was a higher proportion (62.2%) of people holding formal qualifications (Bachelor or higher degree; Advanced Diploma or Diploma; or Vocational qualifications), and a lower proportion of people with no formal qualifications (27.9%) when compared with Greater Adelaide (54.7% and 39.0% respectively). When comparing with national levels of education, the City of Adelaide had a significantly higher share of residents with a Bachelor degree qualification or higher (45.5% compared to 26.3%) but fewer residents with vocational level qualifications (8.8% compared to 19.1%). There were also fewer city residents who held no qualifications (27.9%) compared to Australia (36.8%).⁹³

Primary and Secondary school attendance is significantly lower than for Greater Adelaide (Figure 19). This correlates with the lower representation of school aged children among the resident population. In contrast, over 23% of the resident population is involved in tertiary studies compared to less than 6% for Greater Adelaide, reflecting Adelaide as a major capital city and home to several tertiary institutions. When comparing attendance between the City of Adelaide and Australia, similar trends were evident. Less than 5% of city residents attended primary or secondary schooling compared to 14.6% across Australia. The over-representation of residents attending university is also evident with 23% of city residents attending university compared to 4.7% across the nation.⁹⁴

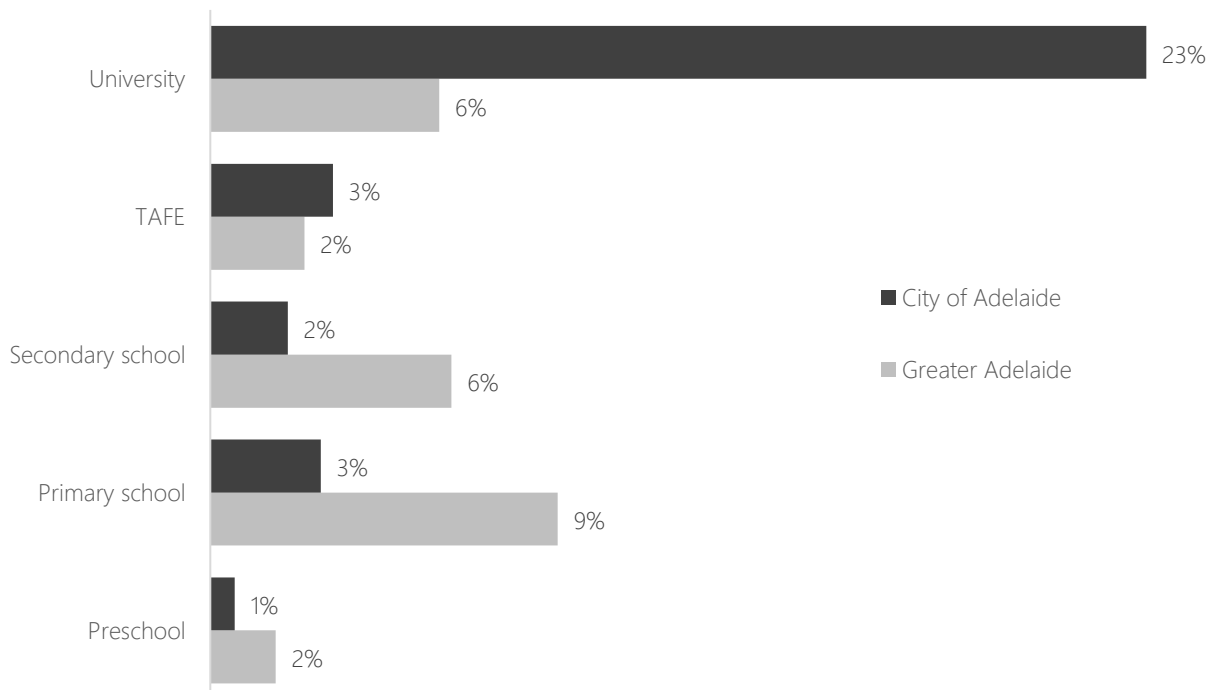


Figure 19 – Type of educational institution attending comparison – 2021⁹⁵

The City of Adelaide is home to a diverse mix of institutions and government agencies including three universities, Cooperative Research Centres and innovation precincts such as Adelaide Biomed City, a \$3.8 billion health and medical innovation district.

The interface between a skilled knowledge economy workforce and institutional collaboration is driving innovation in key specialisation areas. Lot Fourteen is anticipating an entrepreneur innovation hub and University of Adelaide and University of South Australia have announced plans to consider a merge to create a new 'university of the future.'

Start-ups create new products to fill a gap in the market, or enter an existing market with a modified product, and can specialise in any industry sector. Adelaide can position as a location of choice and hub for start-ups, with Lot Fourteen strategically located in Adelaide CBD and surrounded by key infrastructure.

Despite facing a challenging macro-economic environment which involves national economic recovery from the COVID-19 pandemic, climate disasters and ongoing inflationary pressures, the CoA economy demonstrates its value as an economic, social and cultural driver of opportunity for its people and places.

Yet to leverage its competitive advantage, the CoA must consider how the traditional dominance of the knowledge economy will adapt to the rise of the creative class, the urgency of climate mitigation and adaptation, and the need to grow and sustain its reservoirs of institutional and human capital assets.

Policy Implications:

25. Skills and qualifications: There is a larger share of the City of Adelaide population with higher qualifications compared to Greater Adelaide. The City of Adelaide should consider the advantages, opportunities and synergies from having a skilled workforce and a cluster of research institutes, and how this translates to being an innovative city.
26. Building human capital: Future growth will be influenced by the extent to which the qualifications on offer match the skills required in a growing and changing economy. The City of Adelaide should consider how human capital is the new driver of economic growth and businesses are now recognising that access to human capital is a key consideration when deciding where to locate or expand.

Cost of Living

The World Economic Forum Global Risk Report ranks the cost of living as the highest short-term risk to societies and nations.⁹⁶ A range of economic analysts are predicting Australia going into recession in 2023.⁹⁷ Figures released by the Australian Bureau of Statistics show between May 2022 and May 2023, all living cost indices were the highest they have been on record, rising between 7.1% and 9.6% for all households and are higher than the current rate of inflation.⁹⁸ The current cash interest rate has increased 12 times between May 2022 and June 2023 to 4.1%.⁹⁹ Concurrent with inflation, research from the Australia Institute has indicated that increasing corporate profits have accounted for more than two-thirds of the Australia's inflation problem, while wage growth is running at approximately 3.5% growth and not keeping pace with inflation.¹⁰⁰ According to the Australian Bureau of Statistics, the consumer price index (CPI) for March 2023 increased by 1.2% over the quarter for Adelaide. This is similar to the increase in most other capital cities of between 1.2% to 1.4%. Brisbane had a comparatively higher increase of 1.9% while Perth was comparatively lower at 0.9%.

The quarterly increase in CPI for Adelaide was driven predominantly by price rises in education (5.8%), health services (3.3%), and food and non-alcoholic beverages (2%). Segments that saw a decrease in prices over the quarter were clothing and footwear (-3.8%) and furnishings and household equipment and services (-0.7%).¹⁰¹

The City of Adelaide's population is economically polarised between those earning the highest incomes and those earning the lowest or nil incomes; at the same time, there is a large proportion of households in the highest loan repayments and highest rents.¹⁰² Adelaide is one of the few Australian capital cities to experience continued growth in house and unit prices throughout 2022 and 2023 with house prices increasing between 8.5% and 10.3%, and rents increasing between 8.3% and 11.7%.¹⁰³ Housing vacancy rates in Adelaide are relatively low at 0.5% compared to the national residential vacancy rate of 1.1% in March 2023.¹⁰⁴ The 2021 Census indicated that 49.9% of residents in the City of Adelaide rented privately, in addition to 6.4% renting social housing.

Policy Implications:

27. Wages and Cost of Living: The disparity between wages growth and cost of living increases and potential for recession could exacerbate the disparity between city residents on higher incomes versus those on lower incomes. Furthermore, still recovering from the COVID-19 emergency, businesses are likely to be impacted by sales contractions and potential shop and office vacancies. The City of Adelaide will need to consider contingency planning for the social and economic consequences.

Transition to Green Economy

At a Federal level, the Department of Prime Minister and Cabinet assists in the development and implementation of the Government's energy policy agenda. This ensures reliable and affordable energy as Australia transitions to a low carbon economy and boosting the development of new clean energy industries, such as green hydrogen production and export.

The South Australia agency, Green Industries SA's Strategic Plan aligns with the United Nations' Sustainable Development Goals and outlines five strategic priorities supported by focus areas, measures, and actions, to advance the circular economy in South Australia to rethink resource use and reduce the carbon footprint. This will have implications for the City of Adelaide. The five strategic priorities are:

- Circular products and services – Designing out waste to keep resources circulating in the economy and enabling sustainable procurement
- Circular consumption – Reducing wasteful consumption by sustaining products through repair and reuse, avoiding waste, and improving recycling and recovery
- Circular resource recovery – Investing in state-of-the-art infrastructure to unlock the value of materials that would otherwise be sent to landfill
- Circular sectors – Creating economic growth and job opportunities by making targeted industry sectors resource efficient and carbon-neutral
- Circular capacity – Capacity building through investment in training, education, innovation and research and development to nurture the next generation.

International policy instruments such as the United Nations Development Program's Sustainable Development Goals and the China's National Sword Policy, along with national policy instruments (Council of Australian Governments' Recycling and Waste Reduction Bill 2020) are changing the global material market and driving localised recovery and sustainable use of resources.

A strong resource recovery/recycling industry is expected to deliver significant economic results with approximately 9.2 full-time equivalents (FTE) jobs created per 10,000 tonnes of material recycled, versus 2.8 FTE for waste sent to landfill. Nationally this equates to 22,243 FTEs for recycling operations versus 6,695 FTEs in landfill operations.

In South Australia, relevant State regulations, policies and strategies are in place to inform and support the growing importance of the circular economy. These include the *Environment Protection Act 1993 (SA)*, Environment Protection (Waste to Resources) Policy 2010, South Australia's Waste Strategy and South Australia's 'Valuing our Food Waste' Strategy.

The City of Adelaide provides organics, recycling and waste services to residents and recycling and waste services to eligible businesses. Servicing and customer needs vary in a city environment versus urban/peri urban and rural environment. Cities are high density with an average population density of 1,677 persons per square kilometre compared to 435 persons per square kilometre in Greater Adelaide. In addition, 90% of city residents living in medium or high-density dwellings compared to only 26% in Greater Adelaide. This means a highly likelihood of noise complaints and traffic congestions resulting from servicing, which is expected to increase with population growth.

Policy Implications:

28. Green and Circular Economy: There are international, national and state policy instruments that encourage and support the transition to a green or circular economy. The City of Adelaide will need to continue to focus efforts and identify opportunities in this space to support this transition.

Tourism

Across Australia, the tourism industry continues to be impacted by the effects of the COVID-19 pandemic, compounded by natural disaster in some regions.

The South Australian Tourism Commission has three plans that have implications for the City of Adelaide. The South Australian Tourism Plan includes five priority areas along with actions and measures and sets a bold (pre COVID – 19 pandemic) ambition to grow the visitor economy. The priority areas are: Driving demand; Working better together; Supporting what we have; Increasing recognition of the value of tourism; Using events to drive visitation.

The South Australian Arts and Cultural Tourism Plan includes six strategic priorities supported by actions and measures and aims to grow visitation and expenditure on South Australia’s arts and cultural experiences. Priorities focus areas in this plan include marketing, experience and supply development, collaboration, building industry capability, and festival and events. The South Australian Regional Tourism Strategy aims to increase visitors to regional South Australia while the South Australia International Wine Tourism Strategy aims to increase wine related tourism through enhancing market priorities of China, United States of America, and the United Kingdom. In July 2016 Adelaide, South Australia joined the prestigious group of Great Wine Capitals – an internationally renowned network intended to strengthen Adelaide’s global reputation as a world leading wine producer. Adelaide is home to the National Wine Centre, and all national industry representative and research bodies, including Wine Australia, the Winemakers’ Federation of Australia, Australian Vignerons and the Australian Wine Research Institute.

The City of Adelaide is a premier host and organiser for tourism related activities. These strategies will have an indirect impact upon the City of Adelaide as a gateway for regional visitors, the base of some operators, and enhance tourism spend by chaining regional visitation with capital city event visitation.

In 2022, total visitor expenditure for South Australia reached \$8.3 billion, a three percent increase compared to 2019. Visitor expenditure was above the expected result due to a strong recovery from Omicron in early 2022. The opening of international borders as well as a rebound interstate visitation has contributed to these results, as has general inflationary pressures, though to a lesser extent.¹⁰⁵ Though not directly comparable, in 2021/22, the value of tourism in the City of Adelaide was \$1.14 billion and employed over 10,000 persons, mostly in tourism and hospitality (direct and indirect¹⁰⁶). Figure 20 shows the trend in tourism output/sales and value added for the City of Adelaide since 2000. The growth is evident until 2019 however there are signs of an early recovery, consistent with the trends at the state level.¹⁰⁷

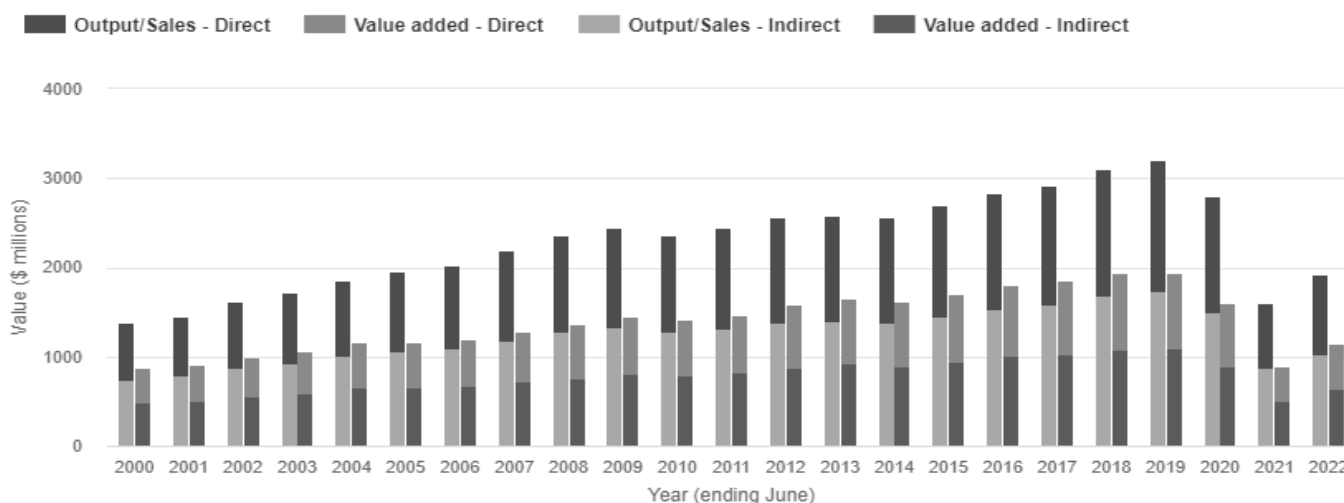


Figure 20 – Value of tourism City of Adelaide 2000 to 2022¹⁰⁸

Part of the value generated by tourism for the City of Adelaide is from events. The City of Adelaide hosts numerous events throughout the year. This includes major international events such as the Adelaide Fringe, WOMADelaide, OzAsia as well as numerous smaller, community driven events. The number of events across the city has exceeded pre-pandemic levels. In the month of November 2022, there were 35 medium/major events in the city compared to around 20 events in previous years. In the October to December quarter 2022, there were a total of 70 medium/major events compared to 53 in the October to December quarter in 2019.¹⁰⁹

According to a report by Deloittes, if the eleven major events and festivals in South Australia achieved their growth targets and tourism expenditure to 2030, it would contribute an extra \$182 million in tourism expenditure and \$59 million to gross state product. In addition to the economic benefits, festivals and events can also bring about social and culture benefits. For example, by playing a role in enhancing social inclusion through the promotion of cultural diversity and providing a unique platform to reach and celebrate particular groups within the community. Festivals and events could also encourage people to engage in a broadly in cultural activities, which has links to health, wellbeing and quality of life.¹¹⁰

Tourists and other visitors accounted for a significant proportion of people who are in the city on any given day. It is estimated that over 300,000¹¹¹ people visited the city on an average day. Of this group, 54% came into the city for shopping, 20% were here to work, 17% were here to study, and 9% were city residents.¹¹²

According to data from Tourism Research Australia, of the \$2 million overnight trips made by Australian visitors to Adelaide and North Adelaide in 2022, 32% came from Victoria, 27% from within South Australia, and 21% from New South Wales. The \$2 million overnight trips also represented a 64% increase compared to 2021 and is close to pre-pandemic levels of travel (\$2.4 million in 2019).¹¹³

Policy Implications:

29. Tourism: The tourism sector continues to recover following the impacts of the COVID-19 pandemic. There are several tourism-related strategies and plans that influence the work of City of Adelaide in this space. The city has shown a strong recovery in the tourism and events space and efforts need to be continued to ensure that the city maintains and enhances its positioning as a centre of tourism activity

Economic profile

The City of Adelaide’s Gross Regional Product (GRP) was \$22.0 billion as of 30 June 2022, contributing to just under 18% of the State’s economic value. Over the past decade, economic growth of the city has averaged an annual growth rate of just over 2% and has been higher than average economic growth for South Australia.¹¹⁴

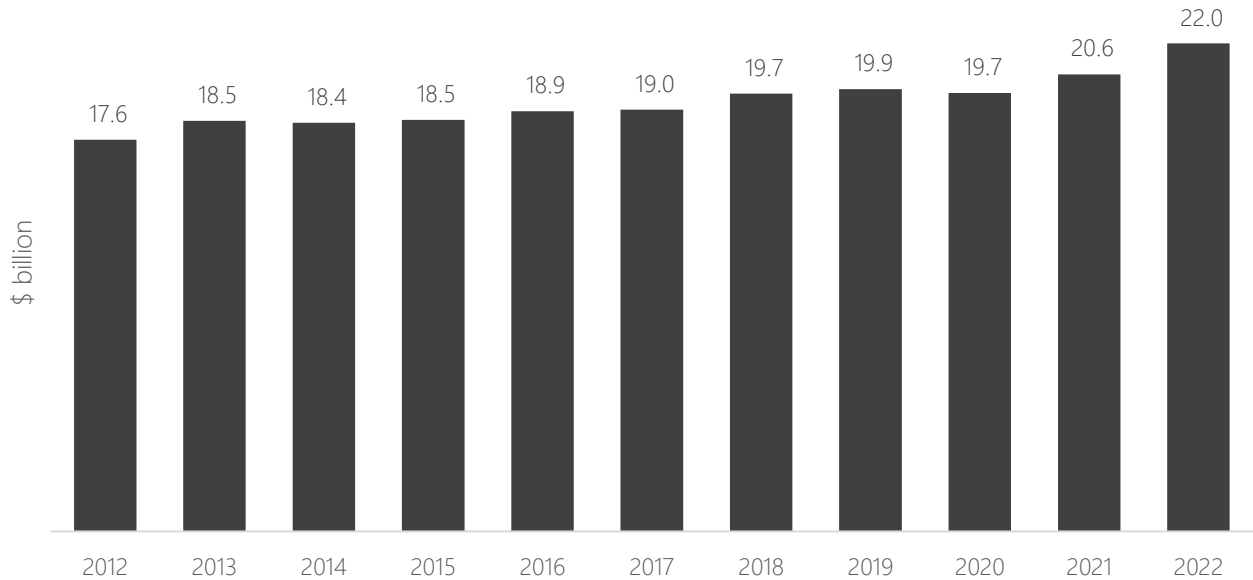


Figure 21 – GRP growth City of Adelaide 2012 to 2022¹¹⁵

GRP is a regional classification of GDP. While the CoA’s GRP showed modest year on year changes between 2002-21 (Figure 22), its proportionate share of the South Australian state product over the same period grew steadily from 13.5% in 2002 to 17.9% in 2021.

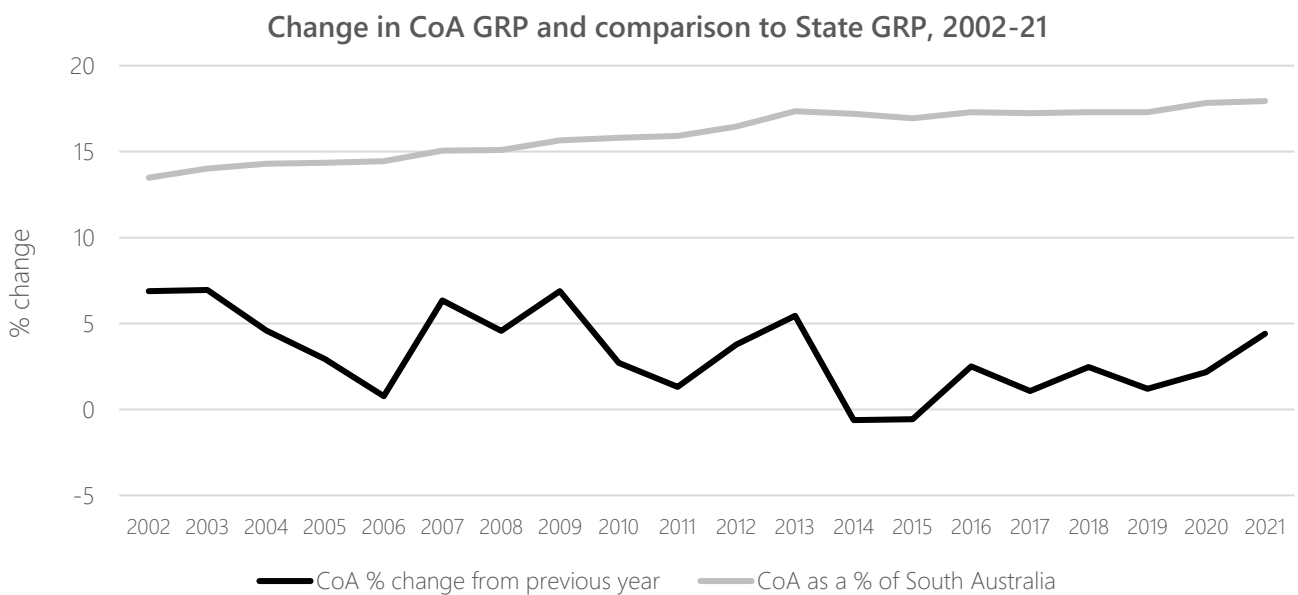


Figure 22 – Gross product changes City of Adelaide AND South Australia, 2002-21¹¹⁶

In 2022, the city's three largest industries in terms of share of value added¹¹⁷ to the city's economy were Financial and Insurance Services (19.7%), Professional, Scientific and Technical Services (13.9%) and Public Administration and Safety (12.5%). These three sectors combined accounted for 46.1% of the total value added for the City of Adelaide and is significantly higher than the share at the State level (21%) and at the national level (23.4%). Across South Australia, Financial and Insurance Services accounted for 8% of total value added while Professional, Scientific and Technical Services and Public Administration and Safety contributed 6.5% each. At the national level, Financial and Insurance Services accounted for 8.7% of total value added, Professional, Scientific and Technical Services 8.6%, and Public Administration and Safety, 6.1%. Manufacturing and Agriculture, Forestry and Fishing accounted for a very small proportion for the city's economy and is significantly less than the economic contribution of these industries at the State level. The manufacturing industry contributed to less than 1% of value add to the city's economy (compared to 7.2% for South Australia and 6.4% nationally) while agriculture accounted for 0.2% (compared to 7.4% for the State and 3.3% nationally).¹¹⁸

Business decisions, local and global economic trends and policy directions are factors that can stimulate industry growth. As depicted in Figure 23, the industries driving local economic growth over the last five years were Professional, Scientific and Technical Services (+\$828.9 million), Health Care and Social Assistance (+\$535.7 million), Financial and Insurance Services (+ \$438.3 million) and Public Administration and Safety (+\$395.2 million). In contrast, industries that experienced the greatest declines were Wholesale Trade (-\$72.7 million), Transport, Postal and Warehousing (-\$54.8 million) and Accommodation and Food Services (-\$38.9 million).¹¹⁹

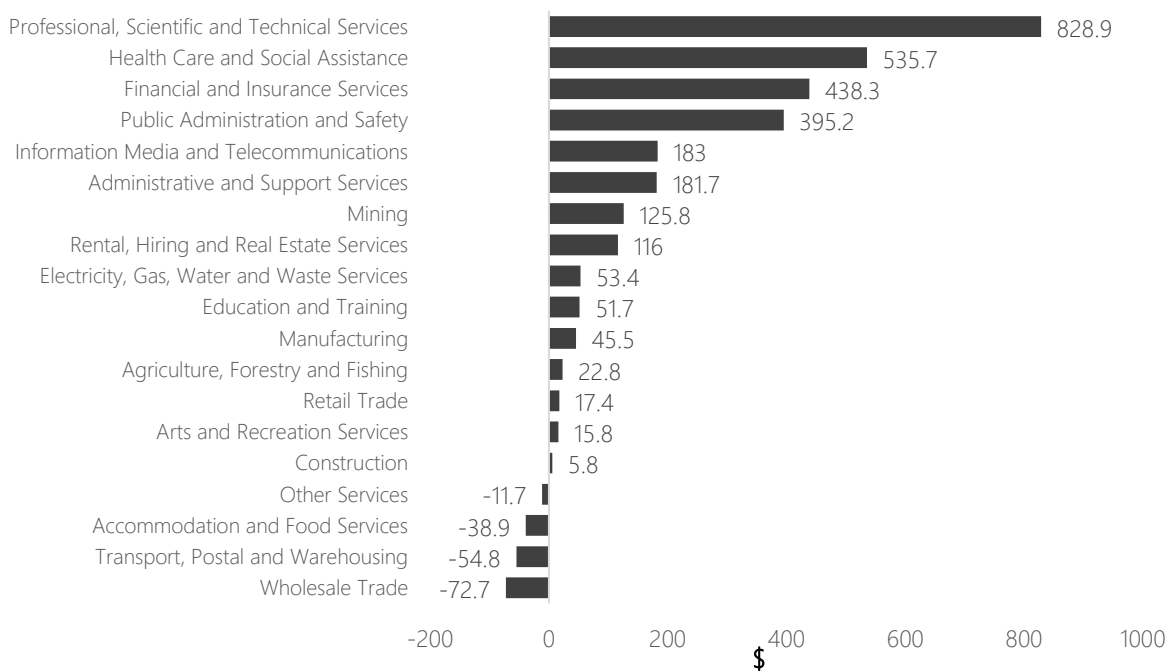


Figure 23 – Change in local industry value add 2016/17 to 2021/22¹²⁰

There were 12,076 active and GST-registered businesses in CoA in October 2022.¹²¹ These businesses are concentrated in the area bound by South Terrace, Pulteney Street, and Grenfell Street. Lot Fourteen may increase business concentration between North Terrace, Frome Road and the Adelaide Botanic Gardens as business investment accelerates. While there are some high concentration areas of professional service businesses in North Adelaide (between Jeffcott Street and O'Connell Street, and Kingston Terrace and MacKinnon Parade), the suburb is largely made up of Adelaide Park Lands and residential areas.

Of the businesses in the city, the greatest numbers were in the Rental, Hiring and Real Estate Services sector (19.9%), followed by Professional, Scientific and Technical Services (18.9%) and Financial and Insurance Services (9.8%). In comparison, the share of businesses for these sectors for South Australia were 12.2%, 10.4% and 4.1% respectively. This highlights the characteristic of the local economy being predominantly knowledge-based.¹²²

Although businesses in retail trade, accommodation and food services and arts and recreation services only account for 13.5% of all businesses in the city, their importance in driving visitation is incommensurate with their numbers. In 2021/22, these three industries combined contributed \$1.3 billion in value added to the city's economy, employed over 14,000 FTEs and had total sales of \$2.4 billion.¹²³

Since 2019, there was an increase of 1,323 businesses in the city. Sectors that experienced the largest growth in business numbers were Rental, Hiring and Real Estate Services (+243 businesses), Professional, Scientific and Technical Services (+240 businesses), Construction (+213 businesses) and Financial and Insurance Services (+130 businesses).

Nationally, there were around 2.6 million businesses across Australia as at 30 June 2022. The industries with the largest share of businesses nation-wide were construction (17.3%); Professional, Scientific and Technical Services (12.9%); Rental, Hiring and Real Estate Services (11.1%) and Transport, Postal and Warehousing (8.3%).¹²⁴

There were 330,319 actively trading businesses across Australian capital city local government areas; the majority of these businesses (59%) were non-employing. Between June 2021 and June 2022, the number of non-employing businesses in capital cities increased by 7% while the number of employing businesses grew by 2.5%. Across capital cities, the industry that experienced the greatest growth were Professional, Scientific and Technical Services, Construction and Accommodation and Food Services. With the exception of Perth and Melbourne, all capital cities experienced growth in these three sectors over the past year.¹²⁵

According to Colliers Quarter Four 2022 report, stability in the commercial office market was due to sustained demand from government tenants and small-to-medium enterprises. In late 2022, the Adelaide central business district (CBD) office vacancy rate was 14.2% for all office CBD stock; a decline from 16% vacancy peak in January 2021. Vacancy rates were lower amongst high-end stock (5.8%) and low-end stock (9.8%) however, middle-grade stock had a high vacancy rate of around 18%. Specific precincts such as the Adelaide Innovation Hub had a very low vacancy rate of 1.2% at the end of 2022. Through to 2024, it is predicted that the CBD office vacancy rate will remain between 14% and 16%.¹²⁶

JLL also reported showed an increase in occupier demand as city vacancy rates fell in Quarter One 2023. This has been due to tenants moving from suburban locations into the city's newer, higher quality offerings such as the Royal Automobile Association (RAA) leasing 91 King William Street and the Lutheran Homes Group leasing 25-27 Franklin Street. This is consistent with the trends experienced over the last year with non-CBD tenants such as Fivecast, Nova Systems and Honeywell moving back into the city.¹²⁷

Despite facing a challenging macro-economic environment which involves national economic recovery from the COVID-19 pandemic, climate disasters and ongoing inflationary pressures, the city's economy continues to play a role as an economic, social and cultural driver of opportunity for its people and places.

Policy Implications:

30. Regional Employment Hub: As a capital city the City of Adelaide attracts a large external workforce because of the major employment activities located within. Knowing where workers reside assists in planning, understanding self-containment, and the degree to which the City of Adelaide provides regional employment.

Workforce Changes and Artificial Intelligence

The labour force is often referred to as the workforce or economically active population and typically includes people aged 15 to 65 years. The workforce includes people who are employed as well as those who are looking for work (unemployed).¹²⁸ The local labour force refers to people who live locally and have the potential to work locally regardless of whether they are currently employed or where they work now. The local labour force is an important resource for the city economy and is an indicator of the skills that are available here. During the December 2022 quarter, the size of the city's labour force was estimated at 14,337 with an unemployment rate of 7%.¹²⁹

Workers are very mobile and as a capital city, Adelaide attracts workers from further afield. According to the 2021 Census, more than 95% of the city's workforce lived outside the City of Adelaide. The top four origin destinations that workers travel from were Charles Sturt (10.0%), Port Adelaide Enfield (9.5%) Onkaparinga (7.0%), and Marion (6.9%).

As at June 2022, there were an estimated 157,498 local jobs in the City of Adelaide. Job counts is a good indicator of the size of the local economy as an increasing number of jobs generally represent a growing economy. The largest local employers in the city in terms of full-time equivalent (FTE) were Professional, Scientific and Technical Services (24,01 FTEs or 18.2%), Public Administration and Safety (23,157 FTEs or 17.6%), and Health Care and Social Assistance (19,886 FTEs or 15.1%). Figure 23 below compares FTE employment by industry for the City of Adelaide with Greater Adelaide.

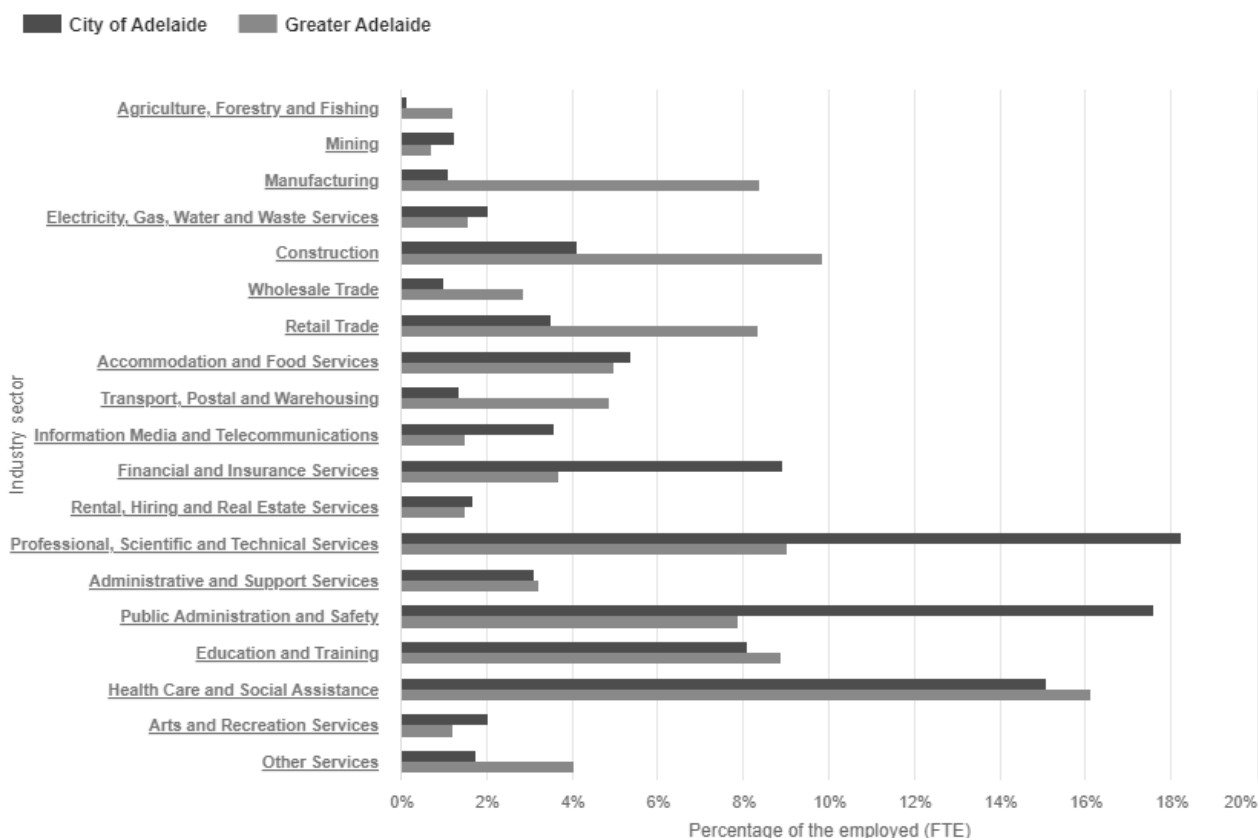


Figure 23 – Total employment (FTE) by industry City of Adelaide and Greater Adelaide 2021

Source: City of Adelaide Economy .id <https://economy.id.com.au/adelaide/number-of-businesses-by-industry>

In comparison 55% of employed city residents also worked in the city while 42.1% travelled outside of the City of Adelaide to work. The top four destinations that City of Adelaide residents travelled to for work were West Torrens (5.7%), Norwood, Payneham and St Peters (4.3%), Port Adelaide Enfield (4.2%) and Charles Sturt (4.0%).¹³⁰

South Australia is currently experiencing skill shortages, which have been exacerbated by the tightening labour market nationally. Between 2021 and 2022, there was a 42% increase in the number of occupational shortage areas, from 153 occupations to 286.¹³¹

The shortage is being driven by a range of factors, including a lack of adequate training and skills development for the workforce, reduced migration during the pandemic years, and the pace of industry change due to digital transformation. Governments at all levels must also ensure that migration settings, infrastructure, planning, housing, and service delivery are well aligned.¹³²

In the five years to 2021, the largest proportion of migration to the City of Adelaide was 6,000 people from overseas. The pandemic resulted in a loss of students and workers, however, Adelaide has competitive advantages as an attractive lifestyle and worker location with vibrant arts and culture, food and wine, and major events.

In terms of future workforce skills, this demand has been shifting and is likely to lead to ongoing structural changes following the impacts of the COVID-19 pandemic. The Productivity Commission suggest that an increasing share of jobs will require non-routine skills as technological change and automation replaces or enhance certain aspects of jobs. The requirement for non-routine skills typically means a demand for workers with a higher level of education or training.¹³³

Industrial and economic advancements have led to changes in labour-based jobs and the creation of new industries. The Fourth Industrial Revolution represents extraordinary technology advances that are merging the physical, digital and biological worlds.¹³⁴ The rate of development may exceed peoples' capacity to be comfortable with the revolution, especially with lagging regulation.¹³⁵ In the wake of ChatGPT's explosive popularity, Goldman Sachs predicted that around 300 million jobs – including administration, data entry, software engineers, customer service, legal assistants, content developers, graphic designers, bankers, accountants, fact checkers and proof readers - could be replaced by artificial intelligence or automated in some way.¹³⁶ As mobility, intelligence and problem solving capabilities develop, the range of jobs replaced by artificial intelligence will become more elaborate. Conversely artificial intelligence will see a growth in new jobs related to development, maintenance, machine learning, digital transformation and people reskilling.¹³⁷

AI can potentially play a role in supporting the public sector by simplifying processes or increasing efficiencies. For example, it could offer more personalised services, improve administrative tasks through increased automation and potentially enable better decision-making through predictive capabilities. The use of AI, however, is not without its challenges and consideration needs to be given to data availability, interoperability, privacy and ethics. Responsible use of AI within the public sector means balancing innovation while protecting the community's interest from potential, unintended negative consequence of such technologies.¹³⁸

Policy Implications:

31. Current And Future Skills Shortage: Understanding the current and future skills shortages will enable the City of Adelaide to identify avenues of addressing this, including opportunities on how the City of Adelaide could work together with other levels of government.
32. Local Economy: The City of Adelaide has experienced positive economic growth in terms of gross regional product since 2012, contributing to a greater share of the State's economic output. Similar to other capital cities, industries that have driven this growth have tended to be knowledge-based sectors. The City of Adelaide will need to consider how it continues to encourage growth in these sectors while at the same time, be cognisant of emerging sectors such as the technological, medical, health and social services.
33. Artificial Intelligence and Work: Like most industrial changes, artificial intelligence (AI) will improve service delivery and productivity. The rapid development and transition to artificial intelligence will disrupt the current economic and labour market as it adjusts to this transformation. The City of Adelaide will need to consider how to proactively manage the economic and labour force transformation which will occur in the city and the opportunities that will arise from this.
34. Emerging Technologies and Challenges: Digital transformation, smart cities, cybersecurity, AI and other emerging technologies and challenges have a place in a mature public sector. As a local government, it is important to balance the benefits of AI through automation, personalised services with protecting the community's interest.

Appendix A

What the 30 Year Plan states
for the Adelaide City Centre

Policies

1. Strengthen the primacy of the Adelaide City centre as the cultural, entertainment, tourism and economic focus of Greater Adelaide. Enhance its role as the centre for peak legal, financial and banking services, specialty health and medical services, higher education, the arts, and high-quality specialty retailers.
2. Strengthen the overall built form of the city, which is characterised by a grid pattern of streets and squares, contrasting with the open space of the Park Lands.
3. Deliver an overall city form that expresses taller buildings within the centre, lower buildings towards the southern residential precincts and some additional height along the terraces and around the four city squares.
4. Reinforce key city boulevards, such as King William, Grote and Wakefield streets through taller, contemporary buildings that create a sense of entry and frame these important streets.
5. Reinforce the special character of the main streets of Gouger, Hindley, Rundle and Hutt Streets through contextual design responses that increase activity and vibrancy while also preserving the elements that make these places special.
6. Create vibrant and distinctive laneways, each with their own individual character, with small bars, restaurants, shops and cafes that contribute to city vibrancy.
7. Reinforce the inner and outer built form edge of the Park Land terraces by encouraging quality medium to high-rise mixed-use developments that increase the diversity of housing while also contributing to, and activating, the public realm.
8. Continue to develop the Riverbank Precinct as a world-renowned health, sporting, educational and biomedical precinct with strong connections to the city centre while reinforcing North Terrace as a premier cultural boulevard with a new vibrant public plaza that will be the heart of entertainment and cultural events.
9. Increase the amount and diversity of residential accommodation in the city to support a variety of household types for a wide range of age and income groups, including students, professionals and the ageing.
10. Sustain the heritage, character and scale of valued residential precincts (including North Adelaide and the south-east and south-west corners) with contextually appropriate development that contributes to the needs of our growing population and provides services to the community.
11. Reinforce the role of the Park Lands as a major recreational, sporting, tourism, natural and open-space asset destination for the city and metropolitan Adelaide that connects the city to the suburbs.
12. Enhance the city's street network to support the intensity and complexity of people movement, business and community activity, to provide great 'people places' befitting Adelaide's heart.

Making it happen

1. Introduce appropriate zoning for the old Royal Adelaide Hospital site that stimulates investment in the east end of Adelaide, grows the city population, and ensures an appropriate interface with the Adelaide Botanic Gardens.
2. Prepare a master plan/framework for the remainder of the biomedical precinct to guide future investment, ensure legible connections are identified and maintained, and provide a quality public realm.
3. Deliver demonstration projects in the Park Lands that help create a liveable city, provide for a range of activities and link the city to the suburbs. In the medium term
4. Deliver the remaining stages of the North Terrace Master Plan with priority on the western end to service the increased population generated by the biomedical precinct, reinforce its status as Adelaide's premier cultural boulevard, and provide a consistent link between the significant cultural, educational and institutional facilities located along the terrace.

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