

CityPulse Adelaide

Setting sail toward Adelaide's prosperity



Making liveable, doable.

CityPulse reveals that Adelaide's liveability and accessibility are defining characteristics.

CityPulse Adelaide provides a detailed set of insights to help understand how our city lives, works and plays. It gives us an understanding of how we must think about planning for growth and the future for the benefit of residents right across the city. It combines data from a range of sources to support a detailed, evidence-based geographic analysis that can guide planning to future-proof our city.

Understanding what makes people choose to live, work or play in a particular community provides invaluable information to support decisions around reform and targeted investment to improve the liveability of our city. Armed with CityPulse data, we can challenge our thinking about how we can continue to develop Adelaide to ensure it meets our needs both now and into the future.

With the Australian Government's naval shipbuilding commitments, South Australia has incredible growth opportunities on the horizon, particularly around Port Adelaide and the surrounding western and northern suburbs. However, to make the most of this we must ensure the right plan is in place to maximise the opportunities for a more prosperous future.

It is vital that we have a coordinated strategy, involving all levels of government, industry and the community, that considers the opportunities around future transport, supply chain infrastructure, community infrastructure and the characteristics of our city that will attract future generations to make Adelaide their home.

Armed with CityPulse data, we can challenge our thinking about how we can continue to develop Adelaide to ensure it meets our needs both now and into the future.



A deep dive into how we live, work and play

Making liveable, doable.



Live

A well-functioning city is one where people feel safe, comfortable and are able to access the services they need. The 'live' component of *CityPulse* focuses on indicators that cover the basic needs of our society, and are a clear measure of our wellbeing and level of social equity: amenities, health, housing and crime.

Live - Top 10

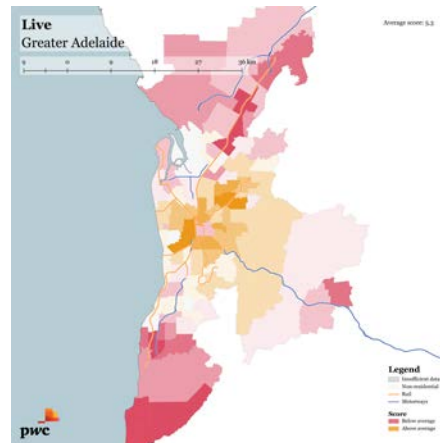
1. Plympton
2. Richmond (SA)
3. Paradise - Newtown
4. Windsor Gardens
5. Goodwood - Millswood
6. Unley - Parkside
- =7. Prospect
- =7. Northgate - Oakden - Gilles Plains
- =9. North Adelaide
- =9. Norwood (SA)



An opportunity to enhance light transport options

The strong 'live' results for Plympton, Goodwood, Paradise and Windsor Gardens demonstrate the enormous value light transport options such as trams and the O-Bahn have delivered to enhance accessibility. Adelaide is a very accessible city, but there is a clear opportunity to enhance light transport options. South Australia's current Integrated Transport and Land Use Plan recognised the value of improved public transport, including light transport options. However, as this plan was released in 2015, there is value in revisiting it to fully consider the impact of the future shipbuilding program and the potential population growth for Adelaide.

Map 1: Live



A stand-out in housing affordability

What stands out in the 'live' data is how well areas such as Plympton, Richmond, Paradise and Windsor Gardens perform against the Housing Affordability metric, whilst also being strong in Health and Amenities. This demonstrates the great potential for Adelaide and its attractiveness for a future workforce as there are so many highly liveable areas, close to facilities and where there are affordable housing options.



The north western suburbs challenge

There is a clear challenge to consider what policy and planning decisions can bring about long-term benefits for the north western suburbs and areas surrounding Port Adelaide so they are attractive places to live for our future workforce. Many of these areas (with the notable exception of West Lakes) perform below average on housing affordability, largely due to high levels of welfare dependency that lead to higher ratios of rent and mortgage payments compared to income. They all perform below average on accessibility to key amenities (e.g. schools, child care and aged care).





Work

Does a city provide its residents with economic opportunity through access to viable employment options? 'Work' assesses a range of economic factors such as business activity, employment rates, access to jobs, welfare dependency and economic performance.

Work - Top 11

1.	Adelaide
2.	Toorak Gardens
3.	Windsor Gardens
4.	Richmond (SA)
5.	Plympton
=6.	Unley - Parkside
=6.	Mawson Lakes- Globe Derby Park
=8.	Goodwood - Millswood
=8.	Mitcham (SA)
=10.	North Adelaide
=10.	Glenelg (SA)



A great city for workers accessibility

We have observed that the results for 'work' are above average in a greater proportion of Adelaide than in other cities. In particular, the job accessibility metric is far more even across the metropolitan area and this is likely a reflection of how easy it is to commute.



Economic activity not matching jobs

The story in the 'work' data is the significant contrast in so many areas between Economic Activity and Welfare Dependency. Some of the areas that rate highest for Economic Activity are also amongst the highest for Welfare Dependency. The greatest contrasts include:

- Largs Bay / Semaphore
- North Haven
- The Parks
- Salisbury North
- Enfield

By comparison, areas such as Mawson Lakes and Windsor Gardens have high levels of Economic Activity that have clearly benefited the people living there (with comparatively lower Welfare Dependency).

The challenge for planning and policy decisions is to consider the key factors that allow local residents to fully participate in the benefits of economic growth and activity in their area.



Getting it right

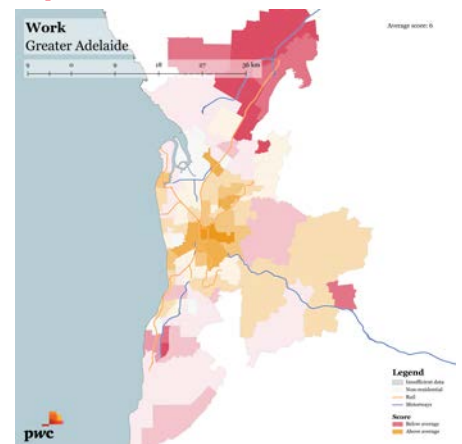
Mawson Lakes is a great example of focussed investment around a work precinct with above average results on 'live' and 'play' and a ranking of sixth for 'work'. Mawson Lakes has been a planned development and is less than 20 years old. This demonstrates the value of a coordinated and planned approach and having the right combination of facilities to support people to live, work and play in the area.

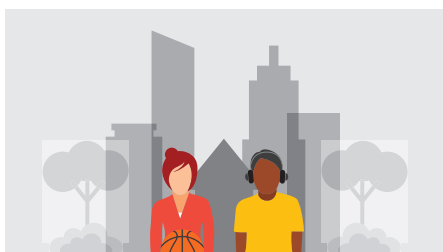


Investing in the South

With Port Adelaide and surrounding areas set for an economic and employment boost thanks to an expanding defence industry, we must ensure that we do not leave the southern areas behind. Developments at the Tonsley precinct will help, but it is critical that there is a robust jobs and industry strategy that demonstrates a strong future for people living in Adelaide's southern suburbs. There will inevitably be a strong attraction to invest in community and economic infrastructure to support the defence and associated industries but we will still need a balance across other parts of the city.

Map 2: Work





Play

To make a city truly liveable, it needs to provide ways for people to connect, explore and recharge. That's because the way we spend our time outside work, school and commitments is a critical contributor to our overall wellbeing. We now spend more time than ever commuting in congested traffic, so easy access to places of entertainment, culture and recreation will give us back more time to do the things we love. 'Play' measures aspects of the locality that make it an appealing place for leisure activities such as entertaining, dining and cultural or sporting activities.

Play - Top 11

1. Adelaide
2. Richmond (SA)
3. Goodwood - Millswood
4. Plympton
5. North Adelaide
- =6. Toorak Gardens
- =6. Unley - Parkside
- =6. Windsor Gardens
- =9. Payneham - Felixstow
- =9. St Peters - Marden
- =9. Mitcham (SA)



Proximity to key amenities

The below average results for 'play' around Port Adelaide and both the northern and southern suburbs demonstrate the opportunity to invest in community facilities and infrastructure to increase the attractiveness of these areas. However, the driving factor of this is access to 'open areas' (particularly parks and gardens). Increasing open areas in long-established and built-up areas requires long-term planning and a willingness to invest.



The vital role of tourism

Adelaide already has a lot to be proud of with beaches, food and wine regions all in close proximity to the heart of the CBD. It's important to continue to evolve the State's current marketing strategy, attracting both domestic and international tourism.

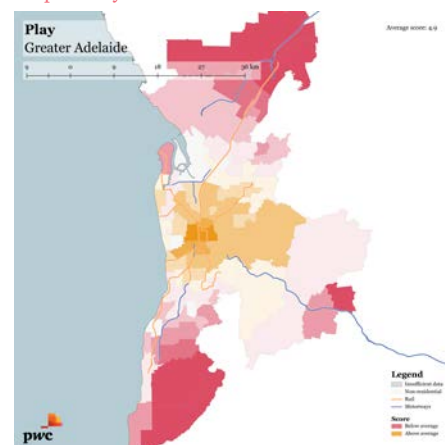


A central hub to celebrate history and culture

With the Adelaide CBD achieving above average 'play' metrics on the back of the sporting and cultural investments by governments over many years, it is important that the CBD continues to maintain its iconic status. The Marshall Government has recognised this by focussing on the old Royal Adelaide Hospital site on North Terrace as a once-in-a-lifetime opportunity to develop a central hub that not only supports industry and education but also recognises our culture and heritage.

In this respect the new Government has made a new national gallery that celebrates aboriginal art and culture a priority. With no such institution existing anywhere else in Australia, this would be a major drawcard for our State in terms of tourism and complement the existing cultural offering along Adelaide's premium boulevard.

Map 3: Play



Adelaide - the Naval shipbuilding capital



Making liveable, doable.

South Australia stands at the precipice of an unprecedented investment by the Federal Government to establish a long-term and sustainable naval shipbuilding industry. While naval projects have been completed in Adelaide over the past 30 years, they have been one-off ventures meaning that the private sector's investment has been largely limited to a project's duration.

The investment in the defence industry is quite simply a game changer for Adelaide. This new commitment will see defence industry companies establishing a long-term presence in Adelaide, employing thousands of people and creating a brighter future for young people in our State.

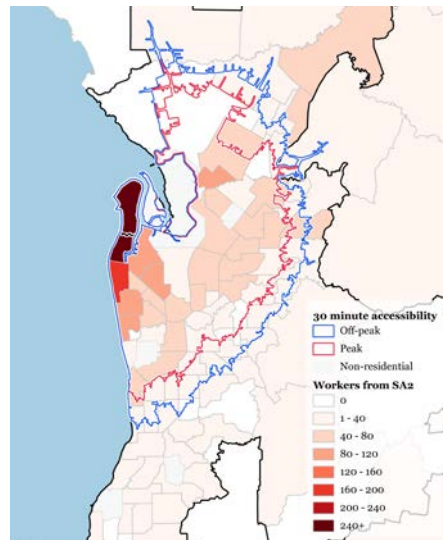
PwC's Defence Briefing Note released in October 2017 found that South Australia can expect at least 8,000 direct and indirect jobs - driving growth equivalent to a new mining industry year-on-year as a result of the long-term defence investment plan and a commitment to continuous shipbuilding.

Many of these jobs will be employed at TechPort at Osborne. What is less clear is where and how the supply chain will emerge to support this massive shipbuilding program (and where those workers will live). *CityPulse Adelaide* data shows in the graphics below, those working at the shipyard tend to live within a 30-minute commute zone. If this trend continues, housing and infrastructure pressures will grow in North Haven as well as in the surrounding western suburbs and Port Adelaide.

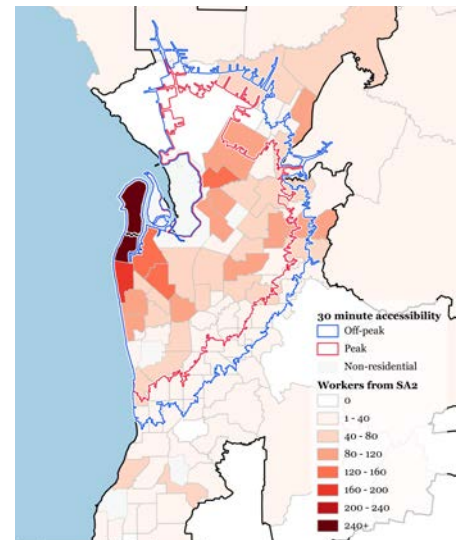
To develop the surrounding areas into a region where people want to live, work and play will require a coordinated approach to precinct planning. Consideration will need to be given to better public transport, accessibility to schools and hospitals, and more amenities.

Shipbuilding workers

North Haven - Car

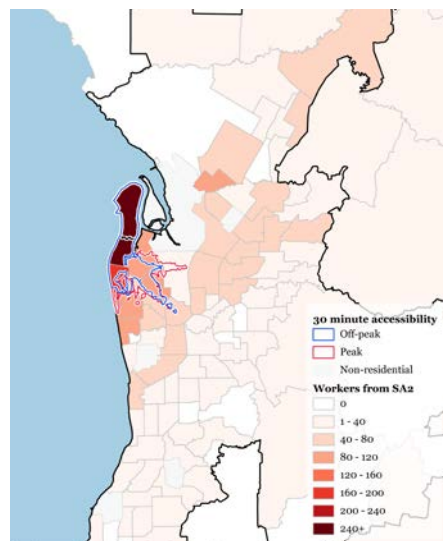


2011 Census: Source of workers North Haven

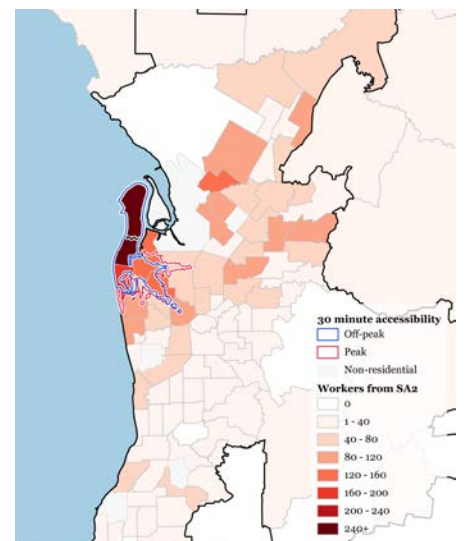


2016 Census: Source of workers North Haven

North Haven - Public Transport



2011 Census: Source of workers North Haven



2016 Census: Source of workers North Haven

The challenges and opportunities to make a better future:



Ensuring that South Australia is prepared for the rapid growth of our defence industry is one of the biggest challenges facing our newly elected State Government. The State Government has the opportunity to seize the moment and put in place a plan in conjunction with Federal and Local Governments and the private sector to maximise the opportunity to revitalise our city, lay the foundations for growth and maximise the once in a generation growth.



Decisions about everything from education to transport, housing to start-up incentives need to be made with the defence industry front and centre.



We have observed that areas that score highly on the 'live' and 'play' metrics are predominately close to the CBD and situated on light rail corridors or close to public transport. Comparatively, the data shows that the areas surrounding North Haven, where at least 4000 new workers are expected to be located, ranks below average for both metrics and has major limitations when it comes to liveability factors such as transport and access to amenities. This highlights just one of the challenges that the naval shipbuilding growth will bring.



The shipbuilding industry will deliver sustained and guaranteed growth over 40 years and rarely do governments have such certainty around which to make strategic and long-term planning and infrastructure decisions. The areas in the 30-minute commute zone around TechPort need to not only attract the best and brightest but also be places they want to stay for the long term.



The growth in employment and industry supply chains will have a profound impact on population movements and infrastructure in western and northern Adelaide, requiring a coordinated approach by all levels of government and the private sector.

A 'City Deal' to transform Adelaide and create a unique precinct

It is evident that the expansion of our State's shipbuilding industry brings extraordinary economic potential and an opportunity to make long-term plans about education, transport, housing and infrastructure through a coordinated strategy involving all levels of government, industry and the community.

Based on *CityPulse* Adelaide findings, we believe the best approach is to develop a 'City Deal' focussed on the defence industry growth to optimise the opportunities for the future.

City Deals bring together the three levels of government, the community and private enterprise to create place-based partnerships. The aim is to align the planning, investment and governance necessary to accelerate growth and job creation, stimulate urban renewal and drive economic reforms.

The situation created by the enormous growth of our State's defence industry appears to be the perfect candidate for a City Deal approach. We need a shared vision for growth, reform, improvement and transformative investment and more importantly a coordinated approach to realise it.

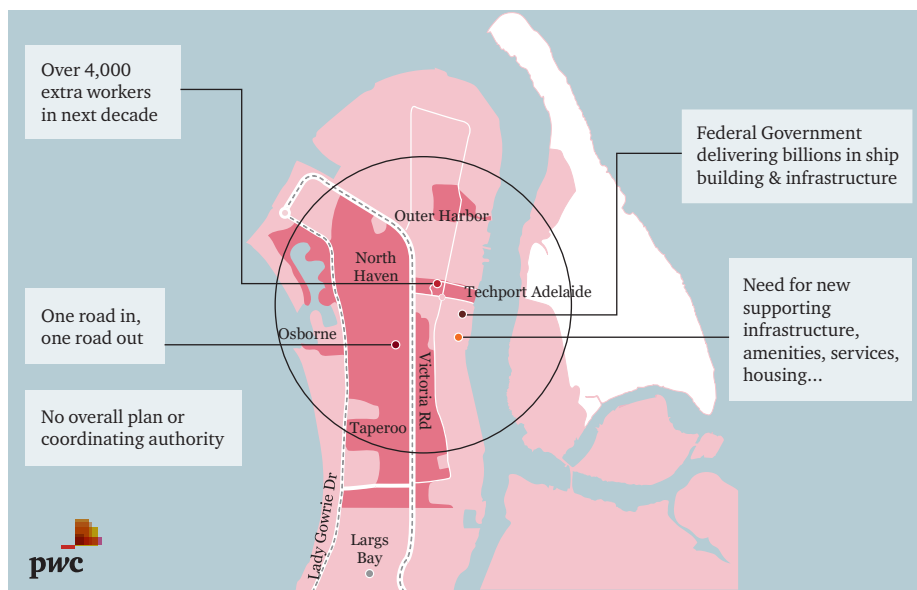
Melbourne, Perth, Geelong and Newcastle are all vying to be known as defence hubs, so for South Australia to claim the title of 'The Defence State', we will need not only more skilled workers and a world-leading education system, but also more housing, transport and infrastructure in key suburbs to support the growing industry and influx of workers.

A co-ordinated approach to Adelaide's infrastructure opportunity



Making liveable, doable.

The Naval Shipyard precinct



The incredible opportunity that the naval shipbuilding program provides for Adelaide brings with it considerable growth for the areas surrounding the Osborne shipyard. The pressure this growth will bring to bare on the infrastructure and transport networks and its connections to broader Adelaide creates an opportunity for transformative change.

With proper and considered planning, innovative infrastructure and transport solutions that meet the needs of industry, communities and individuals will have the opportunity to flourish and continue South Australia's reputation of leading change and entrepreneurship.

The most obvious opportunity for innovation is land transport in and out of the peninsula. With only one road in and out and heavy rail connections, the additional jobs being created in the area and an expanding supply chain will put significant strain on existing transport infrastructure. With growth comes opportunity and whilst one obvious option is the introduction of light rail for passenger movements, there are many emerging transport solutions for both passengers and freight that might find their niche on the peninsula.

CityPulse data shows that people working in existing defence industries around Adelaide travel to work by car rather than public transport. Adding thousands of extra workers and businesses accessing the area without improving transport infrastructure, will put the region under significant additional pressure. This raises the stakes for all involved - if we don't get this right, we will miss the golden opportunity.

Improving the liveability of Port Adelaide and its surrounds to encourage new workers in the area to live locally will help to reduce some pressure on existing transport networks. *CityPulse* data shows that areas in Adelaide that rank high on the 'live' indicator tend to have good public transport links, for example the areas surrounding the CBD to Glenelg tramline and the O-Bahn corridor.

PwC is supportive of investments already being made to improve the region's liveability such as the Port Canal Shopping Centre redevelopment and the Dock One Port Adelaide – a government and private sector collaboration with housing and leisure amenities.

Liveability is also measured by access to schools, childcare and hospitals. Our data reveals that Port Adelaide and the north western suburbs rank lower than average on these measures across the board.

Not surprisingly, the 'play' component is also closely linked to an area's liveability. While the North Haven area does have some natural and existing assets, such as beaches and the community facilities around the Port Adelaide Football Club, *CityPulse* data reveals it has a lower than average ranking for factors such as bars and entertainment venues, sport facilities, fitness and public parks and ovals.

An enormous opportunity exists in the development of the precinct to use this massive uplift in demand to create infrastructure that meets industry, community and individuals' needs. Some of this will be well-designed infrastructure to support people and freight movements, that also enables the emergence and connectedness of social and community infrastructure. *CityPulse* demonstrates that such connectedness reduces congestion, improves accessibility and leads to improved amenity.

Amongst this, coordinated planning consideration also needs to be given to the infrastructure requirements of the '4th industrial revolution'. Industry and community around the precinct will require the enabling infrastructure to access the opportunities that are created through the combining of physical and digital processes. Indeed the combination of emerging and innovative infrastructure and transport solutions, the high-tech world of defence and a geography locked on three sides by sea may create a natural space for rapid evolution of what it means to work, live and play today and in the future.

The ripple effect for businesses in South Australia

Making liveable, doable.



The South Australian economy is underpinned and driven by 140,000 privately owned small to medium enterprises (SME) – making up about 98 per cent of all businesses in the State.

While defence procures most of its major capabilities through prime contractors, the primes will need to rely on a network of more than 3000 SME's to participate in the construction and service supply chains, which will create once in a generation opportunities for the State's business community. By 2020, this is expected to provide a \$2.5 billion stimulus to our local economy.

Already, the Naval Group (who will build the future submarines) is engaging businesses. Not only will there be opportunities in the supply chain for the one million components required to build each submarine, but all of the supporting service industries for those businesses and their employees.

For the past five years, South Australia has been transitioning away from a traditional manufacturing industry due to both necessity (from events such as the Holden closure), and also due to a renewed focus on non-traditional industries. This has enabled an entrepreneurial and start-up community to flourish.

Growth in defence provides an unprecedented opportunity for these innovative SME's and entrepreneurs to join the supply chain.

Providing the local industry can compete on capability, quality and value for money, many of the components needed could be supplied locally. The biggest challenge for SME's will be to grow their capabilities to meet the demands of the local shipbuilding industry and to ensure they are 'defence ready'.

The defence industry will shape, and be shaped, by new innovations from South Australian start-ups and private businesses that should be developing the next wave of future technologies in areas such as:

- Space
- Cyber security
- Advanced sensors, hypersonic and directed energy capabilities
- Quantum technologies
- Integrated intelligence surveillance and reconnaissance
- Trusted autonomous systems
- Enhanced human performance
- Medical countermeasure products
- Multidisciplinary material sciences.

The spin-off from defence is the emergence of complex industries such as advanced manufacturing, automation and artificial intelligence, which will make South Australia more globally competitive. Entrepreneurs, start-ups and private companies not only have the opportunity to join the defence supply chain but exploit new opportunities for international export.

South Australia needs to be bigger, bolder and offer better incentives for businesses and skilled workers to establish roots in the State. With Federal tax system restrictions, the State Government should continue to look at options around tax reform (such as payroll tax, land tax and/or stamp duty) to allow SME's to invest in their future and be more competitive. For example, to stimulate employment, the new State Government has announced its plan to provide businesses with taxable payrolls of between \$600,000 and \$1.5 million an exemption from paying any payroll tax from 1 January 2019.

Existing private companies still need to reinvent themselves to remain competitive. While some businesses will be unable to, others must find new ways of working and innovating to ensure they can be part of the defence supply chain and the related opportunities that will emerge.

We are already seeing examples of great South Australian businesses that are able to attract new capital to allow them to invest and be globally relevant and competitive. Rheinmetall's stake in Supashock and Boeing HorizonX's equity injection in Myriota shows how entrepreneurial and growth minded businesses can capitalise on South Australia having the world's attention.

1. 2016 Annual Small Business Statement, Government of South Australia, 2016
2. Northern Economic Plan - Defence - sector overview, Government of South Australia, undated
3. 2016 Defence Industry Policy Statement, Department of Defence - Australian Government, 2016
4. Payroll Tax SA, Barnfire Pty Ltd, 2018, Scrapping the tax on jobs for small business, Liberal Party, 2018

Creating an educated and skilled workforce for the future

Making liveable, doable.



The growth of South Australia's defence industry presents a significant opportunity for our existing and future workforce with an extra 8000 direct and indirect jobs predicted as a result of the Federal Government's investment.

It will create better pathways for careers in engineering, naval economics, cyber security, technology, mathematics and physics as well as specialist trades such as electricians and welders. There is no doubt that the demand for highly skilled workers will exist but we need to ensure we can meet the supply from the local workforce and new skilled workers who we can retain in the State.

In order to deliver this growth in jobs and workforce capability, it is essential that a deliberate and strategic commitment is made to:

1. Build the right skills to align with the demand in the short, medium and long-term.
2. Attract new talent to Adelaide and retain the talent already here.
3. Create a world leading education system focused on developing teachers and students with the skills, knowledge and capabilities for future work.

Adelaide's shipbuilding program has a 40-year timeline so workforce planning needs to consider the timing of demand and the approach to the supply of skills. This will require a mature and integrated approach across industry, schools, vocational training, universities and government to ensure the education system is creating the workforce of the future. The new State Government's Defence Workforce Plan is a critical initiative to ensure there is a comprehensive plan to focus on this.

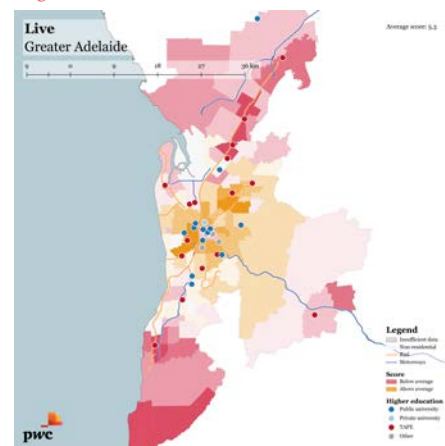
The federal government has also recently announced the successful consortium for the Naval Shipbuilding College. PwC's Skills Australia team is excited to be working with the consortium to train South Australians for shipbuilding jobs.

Access to educational institutions is another major factor that needs to be addressed. *CityPulse* reveals many university and TAFE campuses across Adelaide are serviced by light rail or public transport and this needs to be considered as part of an integrated plan for the Port Adelaide precinct.

Either we need to look at improving public transport options in the region or establishing a new education hub in the northwestern suburbs where people can be educated and trained with the high-tech skills needed to service the expanding defence sector.

The Federal Government's defence investment is also expected to trigger a South Australian population increase of 30,000 to 50,000, many of whom will be skilled workers who we want to retain. The only way to achieve this is to preserve, or better yet enhance, Adelaide's liveability. This is intrinsically tied with education and job opportunities, as well as housing, transport, infrastructure and access to amenities.

Higher educational facilities



Future of the State from the Future Generation



Making liveable, doable.

We have a range of opportunities and benefits that will impact all South Australians both now and for our future generations. What can the future of our state look like? What do we want to maintain? We spoke with a number of our youth to understand what it is they value, and what they want for our future state.

Job progression opportunities

South Australia's 'brain drain' has been well documented as young people move interstate or overseas in search of more job opportunities. The massive investment in Adelaide's defence industry will have positive flow on effects both directly and for the supporting advanced manufacturing, technology, engineering and professional services sectors. The range of jobs and opportunities is going to increase significantly as well as the range of jobs available.

Defence contractors will directly employ a significant range and amount of people. A further key to maximising the potential for South Australia is to help build on existing small businesses, and indeed attract businesses to the state, to support and supply prime defence contractors. The scale and long-term nature of the investment will provide small businesses with an incentive to start-up and grow, with the added potential for future export opportunities.



Brandon Forster:

The key to keeping young graduates in South Australia is to provide opportunities for them to work in leading edge industries and businesses. Graduates these days aren't just looking for any old job, they want to do something that challenges them, and in an area that they can make a difference.



Nicole Wills:

One of the exciting aspects of this economic growth is the opportunity that it will provide for South Australia to retain more of our brightest young minds in the State.

Maintaining liveability through a plan for growth

CityPulse data confirms that Adelaide is defined by its liveability. Adelaide and greater South Australia's success is measured upon not only its economic performance but also its socioeconomic performance of how we live, work and play. This is evident through its affordable housing, short commute times between work and home, amazing white sandy beaches, world renowned wine regions, a multitude of festivals and many sporting/entertainment events to name but a few. The significance of the defence spend can have a large impact on how our city provides the 'work' opportunities for residents.

Given Adelaide's liveability is clearly a major drawcard for its current and future residents, it is important that this investment is adequately supported by plans to manage the forecast growth. We need an integrated plan to tailor further government and private investment in Adelaide's infrastructure so that it is capable of meeting the needs of an expanding workforce and population.

We will need to consider housing, education, health and transport infrastructure. For example, Adelaide is heavily reliant on road transport and population and workforce growth will inevitably impact traffic congestion. Therefore, we have an opportunity to invest more in transport infrastructure that may include extending the tramline down Port Road or implementing a light rail system between Port Adelaide and Osborne.



Matt Howe:

Considered planning and investment will ensure that Adelaide continues to be a very liveable and vibrant city into the future. We have an opportunity now to shape the future of Adelaide and ensure that our great lifestyle is not lost.



Roland Ah Chee:

Adelaide's liveability is clearly a defining characteristic and one which it can leverage to retain its youth and attract people to the city. We need to find a balance between servicing a growing defence industry workforce and maintaining Adelaide's liveability, which is arguably our greatest asset.



Reinvigoration of Port Adelaide

The Federal Government's \$90 billion investment in the defence industry is expected to generate 8000 new jobs in South Australia, most of which will be located around the naval shipbuilding precinct in Osborne.

Initiatives such as Renew Adelaide are helping to revitalise vacant spaces in the CBD and Port Adelaide. Not only has this helped to rejuvenate these areas, but it has also fostered a culture of entrepreneurship and innovation, spawning a number of successful new businesses.

This presents an opportunity to further the revitalisation effort for the Port Adelaide region and growth in nearby suburbs as the data shows us that workers look to settle in the areas surrounding the precinct. This is an encouraging prospect, particularly for investors looking for avenues of growth. By improving infrastructure, amenities and perceptions about regions like Port Adelaide, we will encourage more people to live in these areas and reduce pressure on inner Adelaide's housing, roads and infrastructure.



Roland Ah Chee:

We have an opportunity to reinvigorate large areas of the city including unlocking the potential of Port Adelaide.



Nicole Wills:

Going forward, I think progress will be achieved by highlighting Adelaide's proud history while continuing to transform underutilised spaces attracting greater interest and investment. For example, in 10 years' time, with the right planning and investment, I think that Port Adelaide has the potential to be the next Fremantle.



Kathryn Seow:

The relative affordability of housing in South Australia has always been a drawcard for young graduates looking to become first homeowners. The challenge here will be to broaden the horizons of younger investors to suburbs further from the city while maintaining overall housing prices at a rate that will not edge out these same potential investors.

Data enabled city

For Adelaide to be a success in 10 years' time it must embrace the technological wave that is coming in the form of both the Internet of Things and Big Data technologies. To enable these technologies and truly form a 'Data Enabled City', fast internet speeds and advanced digital infrastructure are required.

The State Government is currently working on the Ten Gigabit Adelaide project, which will help make Adelaide a success in the future and create a Data Enabled City. The increase in the presence of defence industries has the opportunity to increase the pace and range of the project.

Ten Gigabit Adelaide will enable businesses and organisations to connect to a dedicated fibre-optic network, providing access to a range of cloud based services and phenomenal 10Gbps data speeds. The transformational network will unleash a wide range of new possibilities for businesses and organisations, without being inhibited by the restrictions of congestion often experienced with traditional internet services. The challenge is to scale the digital infrastructure a lot better than the NBN.

Premium digital infrastructure and fast internet speeds will enable South Australians businesses to further thrive and create new technological opportunities in an increasing digital economy.



Serge Zebian:

Not only will a data enabled city create a digitally thriving ecosystem, it will create more jobs for SA, and not just any jobs, really cool tech ones.

A vision for growth

Adelaide is a liveable and accessible city. Our relative short commute times, housing affordability and world-class arts and cultural events make our city an attractive place to live, work and play.

The Federal Government's unprecedented investment to establish a long-term and sustainable naval shipbuilding industry brings extraordinary economic potential for South Australia but also the possibility of major growing pains if we do not adequately plan for the future.

Defence industry companies are expected to establish an enduring presence in Adelaide, employing thousands of people, generating opportunities for supply chain businesses and creating a bright future for young people in our State.

But as *CityPulse* shows us, the growth of the defence industry and associated supply chain will also put pressure on existing infrastructure particularly around Port Adelaide and the surrounding western and northern suburbs.

To ensure we capitalise on the opportunities presented by a growing defence industry whilst maintaining our city's livability, we need to make long-term plans about education, transport, housing and infrastructure to cater for an influx of workers.

PwC believes it is vital to bring together all levels of government, industry and the community to develop a co-ordinated strategy to future-proof our city and ensure that we can attract and retain skilled workers who can help Adelaide prosper.

Understanding what makes people choose to live, work or play in a particular community provides invaluable information to support decisions around reform and targeted investment to improve the liveability of our city.

Armed with data and resources such as *CityPulse*, we can collectively challenge our thinking about how we can continue to develop Adelaide to ensure it meets our needs both now and into the future.



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