

2021

Future Victoria

A PwC Australia CityPulse Analysis



November



Foreword

New CityPulse insights show skyrocketing liveability for more Greater Melbourne suburbs

COVID-19 has rewritten the entrenched habits and norms of the way Victorians live, work and play. We've seen years of disruption and digitisation accelerate over a few short months as the pandemic forced individuals, families, businesses and governments to adjust to a vastly different world. For our state to thrive in a post-pandemic world, our cities and regions must continue to provide new opportunity, infrastructure and services as it acknowledges the changing needs of its citizens.

When PwC Australia first undertook its CityPulse analysis four years ago, the strongest factors in determining high liveability ratings included proximity to the CBD and its associated jobs, as well as its amenities. This meant inner-city suburbs including Hawthorn and Richmond topped the charts as the most desirable places to live, work and play in Victoria.

Last year, our CityPulse analysis considered how our liveability would change if commute time to the CBD was no longer a factor, given extended lockdowns and COVID-19 made working from home more feasible, and in some instances, a necessity. While inner-city suburbs continued to fare well in absolute liveability, the most improved suburbs in the middle/outer ring presented a more balanced view of liveability across Melbourne. Suburbs including Point Cook, Mt Eliza, Panton Hill and Beaconsfield were among the top improvers.

In 2021, our analysis evolves again, by examining the shifting priorities and changing values of Victorians, as COVID-19 drives permanent change and new habits in the way we live and work. It's a data-driven deep dive of how our suburbs and towns rate, now that our lives have changed so irreversibly.

How has COVID-19 altered the way we live our lives, the way we work, the way we raise our children, the ways we exercise? How has the global pandemic shifted what we value about where we live, and has the pandemic in fact changed many of our suburbs for the better? What will the profound changes to our future mean for the provision of healthcare and education?

Throughout the pandemic, we've all spent more time closer to home, and many businesses and employees have transitioned to more flexible ways of working, suspending the daily office commute and instead logging on from home. This new model of working is a welcome development for many – and one that will endure long after the pandemic subsides. For other Victorian workers, working from home hasn't been so simple, or won't be possible once restrictions ease.

That's why CityPulse 2021 recognises that after the pandemic, Victorians may live and work quite differently. This year's analysis includes a liveability score of suburbs for those who can or will continue to work from home on a semi or permanent basis, and a separate score to acknowledge those who can't, or won't.

The results suggest that liveability shifts once a commute is no longer a primary consideration, but proximity to the CBD and other key employment destinations becomes much more important when transit to work is a primary factor. Many locations, such as Northcote, Essendon-Aberfeldie, and Heidelberg-Rosanna, score high for liveability regardless – reflecting their all-round strengths and attributes.



CityPulse 2021 unearths the rise of the family-friendly, middle ring suburbs

CityPulse 2021 has shown destinations popular with first-home buyers and Victorians seeking to raise a family have improved when it comes to their Live – *Staying Local* scores. We've seen suburbs such as Heidelberg, Wantirna and Montmorency rise up the rankings with their Live – *Staying Local* scores, courtesy of good accessibility to open spaces for recreation and larger, more affordable homes. Crucially, many of these suburbs have become more liveable once a commute to work factor is removed. Victorians working from home may find a lot of value in these suburbs.

While high liveability is transcending further afield across greater Melbourne, our fastest-growing outer suburbs remain challenges that we need to address. With these outer corridors continuing to grow at steady knots, infrastructure and service delivery capacity will need to keep up – and so too will suburban transport options.

Melbourne's CBD will weather the storm of COVID-19

For those whose commute will remain a factor into the future, the dial shifts, and proximity to Melbourne's CBD and areas of dense job opportunities becomes as important as it was before the virus reached Victoria.

Despite the realities of COVID-19, staying connected to the business heart of a city remains a priority for many people, demonstrated by Melbourne's CBD retaining the top Live – *Commuting* score for 2021. The result gives rise to our view that reports of the death of our CBDs are grossly exaggerated. In fact, the CBD will retain its place as the heart of our city, and a hub of commerce, creativity and leisure.

So, what's next for Melbourne's CBD – How will the focal point of our economy transition and thrive again in a post-COVID world? And what does that transformation look like?

While we believe Melbourne's CBD will rise again, our analysis demonstrates that opportunity also lies elsewhere, such as Point Cook. Last year we saw Point Cook experience the greatest jump in 2020 Live scores and it continues to be a strong performer in the 2021 analysis – what does this mean for this suburb in Melbourne's outer western growth corridor?

Prior to COVID-19, Melbourne was one of Australia's fastest-growing cities, but a halt on overseas and interstate migration gives governments, councils, business and our planners an opportunity to pause for thought to consider how we make the most of this temporary reprieve.

Growth in outer-ring suburbs will need to be addressed to ensure communities are well-served to keep up with demand. Steps to decentralised Melbourne may help to shore up the amenity and live, work and play opportunities for these outer neighbourhoods, closer to home.

In CityPulse 2021, we've sought to understand these shifts in the way we live and work ignited by COVID-19 and how we address the challenges and the opportunities that lie ahead for Victoria. CityPulse 2021 provides rich food for thought for governments, councils, business and our planning and transport authorities as Victorians cement their new post-pandemic living and working priorities.

Peter Konidaris
Melbourne Managing Partner
PwC Australia

Changes to 2021 methodology

2021 has placed a renewed emphasis on easy access to the things we value, closer to home, including shops, parks, cafes and health care, so we have adapted CityPulse's methodology accordingly. The following updates reflect the pace of change required as we adapt due to COVID-19, while trying to preserve what we valued before the pandemic struck – the things that will return once COVID-19 subsides.

1 Play incorporated into Live scores

Recognising the way our working habits have changed due to COVID-19, this year's Live – *Staying Local* score gives less weight to the need for a commute to work, and best describes the experience of an individual who is able to or chooses to work from home, while the Live – *Commuting* score (previously our Work score) reflects the best suburbs to live in for those who return to the office or cannot work from home.

Our lives have become much more localised since the start of 2020, in recognition of this, our 2021 CityPulse analysis integrates Play with our newly named Live scores.

Physical distancing requirements and capacity restrictions have limited cultural activities and entertainment. Recreational activities have relied on access to open space and essentials such as supermarkets, for example, taking a walk during a lunch break while working from home, or taking the kids to the local park for a play. Many of the ways we integrate recreation and play into our daily routine will remain long after the pandemic disappears.



2

Six new metrics reflect lifestyle changes Victorians now prioritise during COVID-19

We have introduced six new metrics reflecting key elements that Victorians now highly value due to COVID-19. These reflect our shifting lifestyle priorities within the current context of remote work and pandemic-related restrictions:

- average number of people per bedroom in a suburb
- growth in property and rental prices
- access to supermarkets
- access to playgrounds
- access to cafes
- street safety.

In line with these shifting priorities of Victorians, more weight is given to some metrics than others. For instance, we have placed higher weights on the number of people per bedrooms in a suburb (a key indicator of household activity and therefore the ease with which inhabitants can work from home), as well as placing higher weights on local access to key nearby amenities such as parks, beaches, gardens, or restaurants, cafes or retail. Property price performance is another more heavily-weighted metric – suburbs with lower property prices but higher growth prospects fare better than those with higher current prices, or lower prospects for growth.

3

Measuring walkability

Reduced transport dependency due to stay-at-home restrictions, and localised lifestyles for many, have led to the introduction of this new metric ‘measuring walkability’. This examines access to key amenities or points of interest on a 15-minute walk, rather than the previous metric of a 30-minute drive or transit.

Walkability score methodology is based on factors including street safety and proximity to public transport and local facilities on foot, as many of us swap office-based work arrangements for working from home, the desire to live in walkable suburbs has increased.



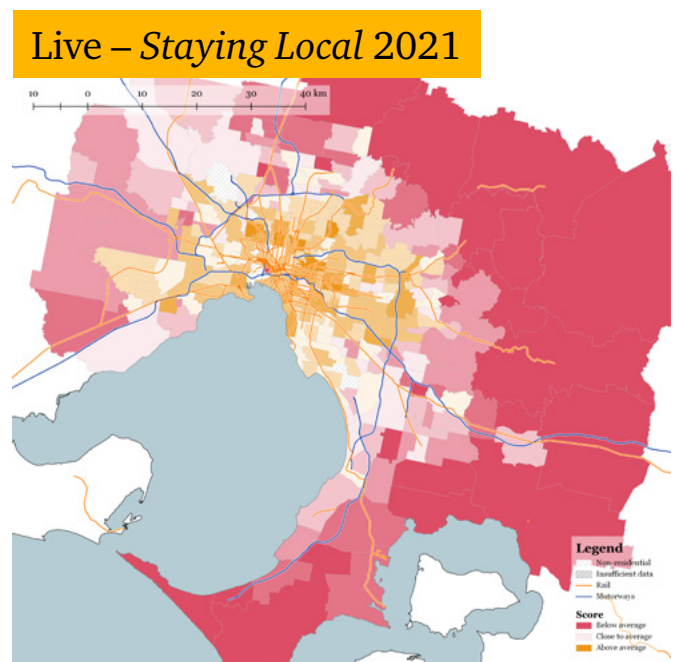
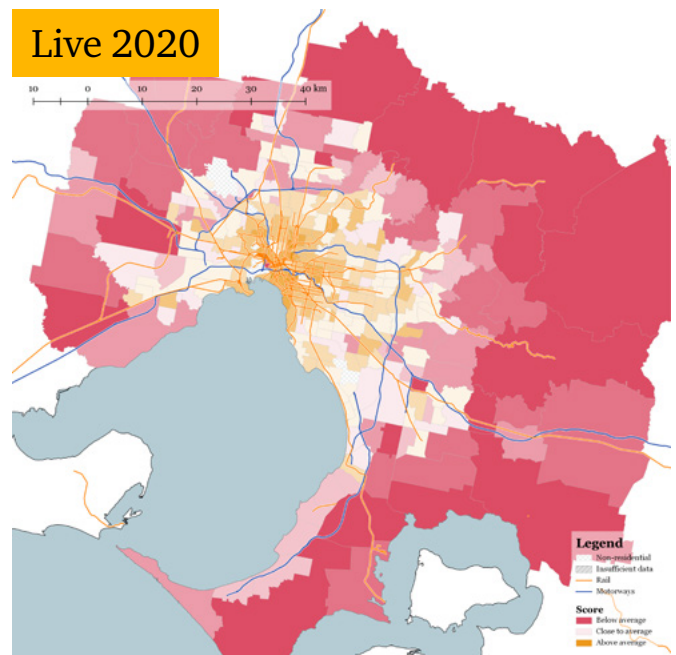
Key findings

Live scores in Melbourne's inner ring remains high, but the family-friendly middle ring is catching up

New CityPulse analysis shows that the Live – *Staying Local* scores of our suburbs is growing in Melbourne's family-friendly inner ring. Whereas once upon a time higher Live scores were predominantly the domain of suburbs on the cusp of the CBD, changes to the way we live mean that suburbs offering more open space, larger homes, and easy access to key essentials are, in many cases, valued as much as those close to the city.

This year's Live – *Staying Local* scores see Melbourne's inner-north suburb of Northcote and neighbours Heidelberg – Rosanna, along with Kew and Coburg all featured in the top 10. Northcote climbed five spots up the rankings, topping the chart with a score of 10. The key metrics of both Live scores are central to these rankings, awarded to suburbs deemed the best place for residents to live who can either work from home full time or who do not work.

Suburb (SA2)	Live – <i>Staying Local</i> score 2021
Northcote	10.0
Heidelberg – Rosanna	9.5
Essendon – Aberfeldie	9.3
Wantirna	9.3
Montmorency – Briar Hill	9.2
Greensborough	9.1
Blackburn	9.1
Kew	9.1
Ringwood	9.1
Coburg	8.9
Mulgrave	8.9
Wantirna South	8.9
South Yarra – East	8.8
Burwood	8.8

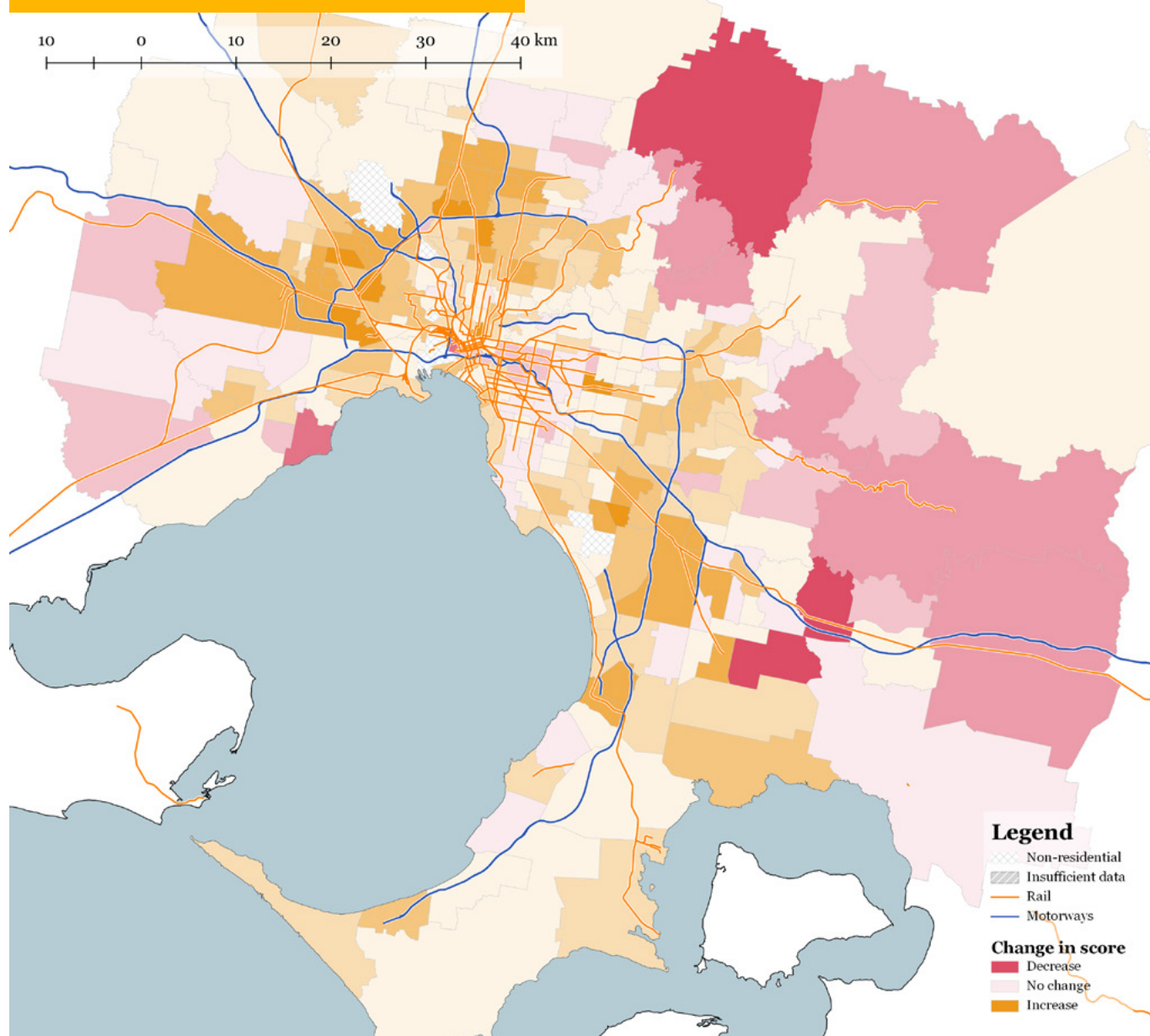




As the table below demonstrates, many suburbs within Melbourne's inner ring returned much more favourable results, as families confined to their homes relished larger properties, more open space, slightly more affordable real estate with good growth prospects, and easy access to supermarkets, playgrounds and cafes.

Suburb (SA2)	Rank 2021	Rank 2020
Northcote	1	5
Heidelberg – Rosanna	2	47
Essendon – Aberfeldie	3	8
Wantirna	4	87
Montmorency – Briar Hill	5	154
Greensborough	6	128
Blackburn	7	30
Kew	8	12
Ringwood	9	117
Coburg	10	60
Mulgrave	11	89
Wantirna South	12	96
South Yarra – East	13	27
Burwood	14	228
Eltham	15	66
Rowville – Central	16	114
Fitzroy North	17	43
Malvern – Glen Iris	18	7
Glen Waverley – East	19	141
Camberwell	20	15
Prahran – Windsor	21	6
Newport	22	42
Wheelers Hill	23	91
Surrey Hills (West) – Canterbury	24	16
Brunswick	25	9
Doncaster	26	37
Strathmore	27	62
Malvern East	28	14
St Kilda	29	98
Ivanhoe	30	22
Hawthorn	31	2
Moonee Ponds	32	4
Mitcham (Vic)	33	35
Balwyn North	34	34

Change in liveability 2020-2021



Newcomers to the top 10

For the first time, locations such as Montmorency-Briar Hill and Greensborough have flown up the charts and made their way into the top 10 Live – *Staying Local* scores. For residents working from home, they represent desirable areas in which to spend more time, striking a balance between offering walkable access to key amenities, more space and sound property price performance.

Many larger destinations on Melbourne's outer fringe are still considered excellent locations for a move further afield or a more family-friendly lifestyle away from the hustle and bustle of the city, but will not have placed on this year's list if key access to amenities is more than 15-minute walking distance. They remain strong contenders if residents are happy to drive and live more remotely, given their improved property results and the additional space they offer.

The rise of the Mornington Peninsula continues

The Mornington Peninsula and the sandbelt corridor were popular residential areas during the pandemic in 2020-2021. The entire peninsula climbed the list for 2021, continuing the trend seen in CityPulse 2020, where the peninsula suburbs and towns of Mt Eliza, Mt Martha, Point Nepean and Dromana all topped Melbourne's southern pocket 'Most Improved Live Score Suburbs'.

Scores this year were based on high growth in property and rental prices, swathes of open space along the seaside shore, and good walkable access to major amenities. Major infrastructure improvements including the removal of level crossings along the sandbelt and easy access to other parts of Melbourne thanks to Peninsula Link were also key factors.

Mornington Peninsula change in rankings

Rank	Suburb (SA2)	Live – <i>Staying Local</i> score 2021	Change in Rank
109	Frankston	7.2	126
144	Keysborough	6.8	58
176	Carrum – Patterson Lakes	6.3	24
178	Frankston North	6.3	91
186	Chelsea Heights	6.2	55
187	Dandenong	6.1	85
193	Seaford (Vic)	6.0	23
202	Chelsea – Bonbeach	5.7	-52
211	Carrum Downs	5.4	28
214	Mount Eliza	5.4	-80
216	Frankston South	5.4	-22
226	Langwarrin	5.2	24
241	Mornington	4.6	8
245	Mount Martha	4.4	-91
255	Hastings – Somers	4.0	19
256	Rosebud – McCrae	3.9	27
257	Dromana	3.9	-3
263	Somerville	3.8	-19
264	Point Nepean	3.7	9
273	Skye – Sandhurst	3.2	-66
292	Flinders	0.0	-2

A person wearing a helmet and a backpack is riding a bicycle on a city street. The scene is captured during the "golden hour" of sunset, with long shadows and a warm, orange glow. The background shows blurred city buildings and traffic, suggesting a busy urban environment. The overall mood is one of movement and urban life.

“

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Melbourne's CBD still leads the way when it comes to work

The CityPulse Live – *Commuting* score recognises that not all people can work from home or will choose to work from home post COVID-19, and therefore assesses the liveability of suburbs based on proximity to job opportunities.

Despite the realities of COVID-19, staying connected to the business heart of a city remains a priority for many people, demonstrated by Melbourne's CBD securing the top Live – *Commuting* score for 2021. The result gives rise to our view that reports of the death of our CBDs are grossly exaggerated. In fact, the CBD will retain its place as the heart of our city, and a hub of commerce, creativity and leisure.

As people return to the CBD for work and for play, access provisions may need to change. The normal 9 to 5 commute may be thrown out the window for many workers, as they access restaurants and entertainment after hours. Transport networks will need to evolve to support these new travel patterns, potentially requiring more services to shoulder new peaks.

The CBD isn't dead, it's just undergoing a transformation, and the full picture is much more nuanced than we thought.

CityPulse's Live – *Commuting* score represents the suburbs with the best accessibility to job opportunities – and the best places to live when it comes to non-remote or front-line work. It is determined by how each destination performs against key metrics, including:

- job accessibility and growth rate (by car and transit or public transport)
- local industry Gross Regional Product and growth rate
- unemployment rate
- key amenity access like cafes and supermarkets.

It acknowledges that not all workers will want to, or are able to work from home, by analysing factors such as job opportunities, employment rates, and access to jobs for workers who prefer to return to a physical workplace or who cannot work remotely.

This year, Melbourne is a clear rankings leader, with a Live – *Commuting* score of 10, followed by South Melbourne (8.9) and Brunswick (8.8). Interestingly, Northcote, Essendon – Aberfeldie and Heidelberg – Rosanna feature in the top 10 rankings for both Live scores.

Suburb (SA2)	Live – Commuting score
Melbourne	10.0
South Melbourne	8.9
Brunswick	8.8
Camberwell	8.8
Northcote	8.8
South Yarra – East	8.8
Brighton (Vic)	8.7
Essendon – Aberfeldie	8.5
Heidelberg – Rosanna	8.4
Southbank	8.4
St Kilda	8.4
Malvern – Glen Iris	8.3
Kew	8.2

Post-COVID changes for CBD workers

Currently, up to 40% of the workforce are able to work from home, depending on their trade or profession, which leaves approximately 60% still working on site, according to data from the 2021 Working from home research paper published by the Productivity Commission.¹ We know that once the COVID-19 pandemic ends, many more people will choose to return to their physical workplaces, either full-time or part-time.

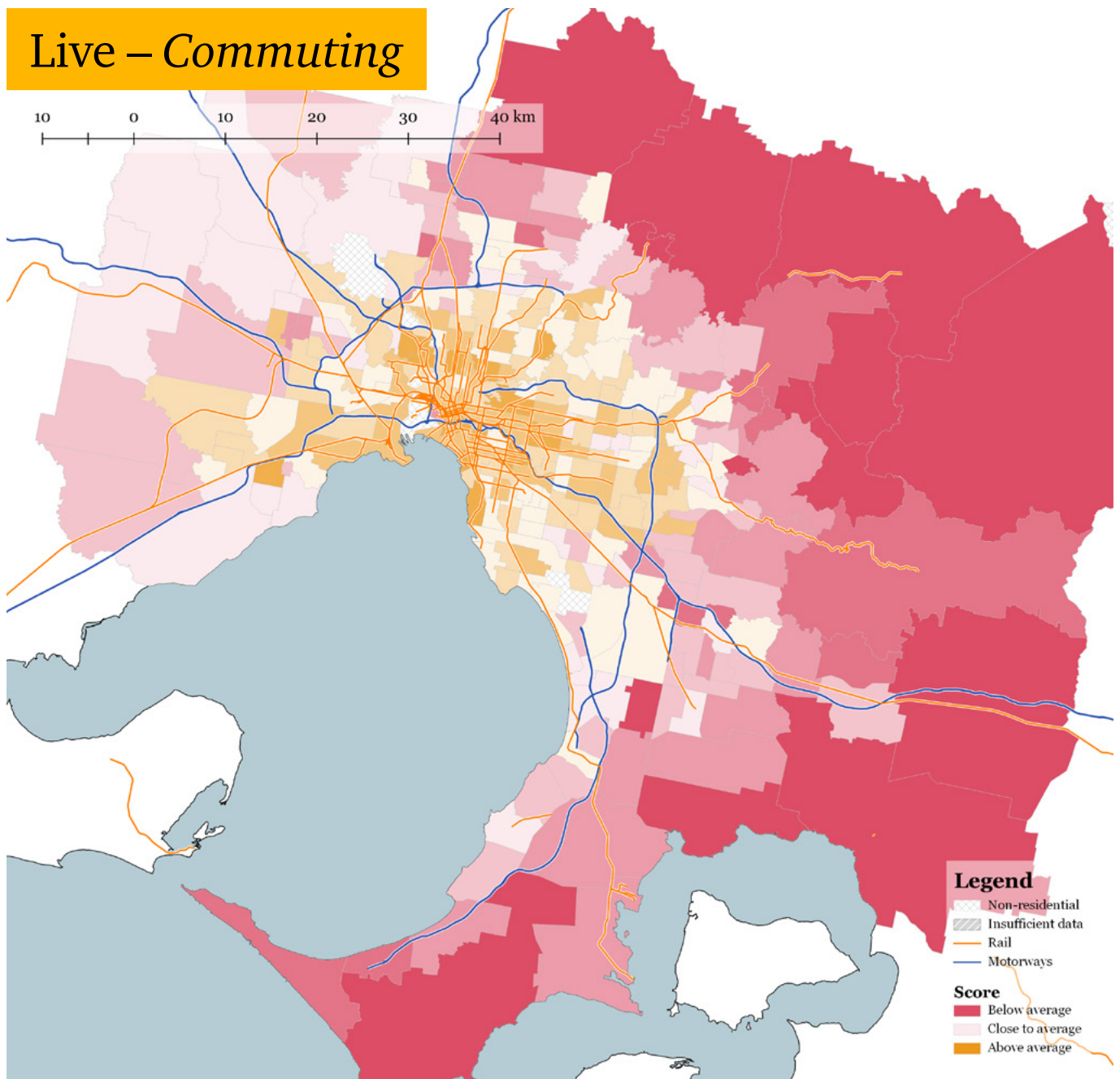
In Melbourne's case, this will be a welcome influx to help counter the economic decline the CBD has endured during COVID-related shutdowns, coupled with the surge in ecommerce, propelled by the pandemic, which has adversely affected retail outlets. A bounce back may be slow, but there is potential to attract a new wave of people wishing to take advantage of the CBD's reduced rental prices caused by the pandemic.

In addition, while some staff will be keen to return to their original place of work, businesses will have to make the commute time worthwhile for those employees who prefer to continue working from home. Businesses will need to differentiate their workplaces as value-add spaces that offer connection and a desirable place to work.

There will be a flight to quality, with offices becoming the heart of a business or place for cultural recharge and sanctuary – a place to connect with people, colleagues, clients and friends.

¹ Productivity Commission, Working from home, Research paper, Australian Government, Canberra, 2021.

Live – Commuting





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Point Cook: A suburb on the move

Point Cook in Melbourne's west is one suburb to watch, due to its all-round strengths as a place to live regardless of work arrangements, sitting in this year's top 15 Live – *Commuting* score rankings.

Last year the suburb saw the greatest jump in CityPulse Live scores, and Point Cook continues to be a strong performer.

This year, Point Cook has fared well due to its all-round attributes – easy access to supermarkets, fitness centres, food and drink outlets and other key amenities via a short walk, along with its high growth rate of employment opportunities and strong property price outlook – it hits the metrics weighted more heavily in 2021.

Point Cook's winning combination across different metrics gives rise to its consistently strong CityPulse verdict. The suburb has good access to a diversity of jobs in Melbourne's CBD and western suburbs which promotes its Live – *Commuting* score – the average commute distance is approximately 20.5 km. This commute is 30% higher than the Melbourne average of 15.7 km but provides potential for a higher liveability score in a suburb that enjoys good amenities such as cafes and larger open areas.

Point Cook is located in Wyndham City Council, part of Melbourne's established west growth corridor – and has all the hallmarks to make it a contender to become a future satellite city within Melbourne. The suburb's location is synonymous with its high growth rate and continued government investment for projects such as a community hospital. The suburb also stands to gain from enhanced connectivity through major transport initiatives including the West Gate Tunnel, level crossing removals, and already benefits from the Williams Landing train station built in 2013.

Walkability has become more important than ever

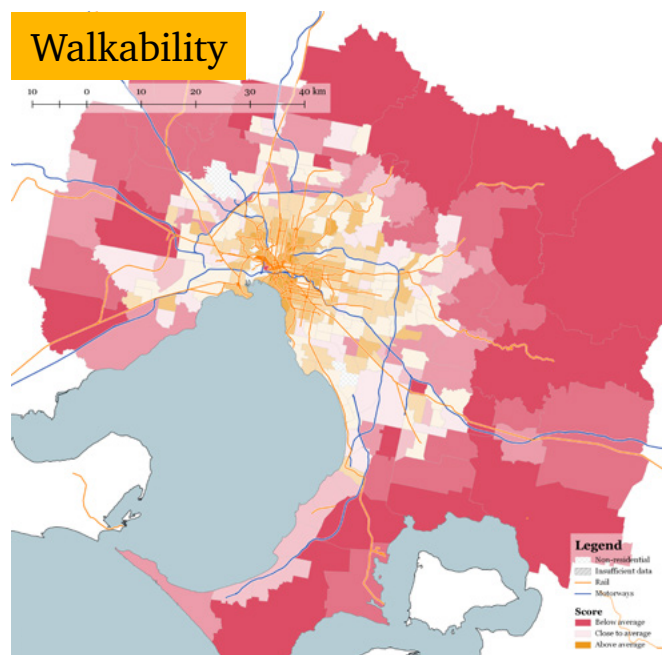
A new feature of this year's CityPulse report is the introduction of a Walkability score, which recognises that we are increasingly now spending more time closer to home. We have placed a greater value on the ability to walk freely at a time when travel restrictions have been in force. So much so that remaining more localised in and around our resident suburbs has revitalised a lifestyle of walkability.

Melbourne's most walkable suburbs

All 2021 top-scoring destinations, featured on Melbourne's most walkable suburbs list, are city-based or inner-ring areas, from South Yarra–East in first place, to Abbotsford in thirteenth place. With access to local facilities in the city being greater than in outer suburbs, the results stand to reason. Once people strike a balance between remote and office-based work post-COVID, only time will tell whether this new lifestyle still has legs, or if commuting will gain traction once more.

Suburb (SA2)	Walkability score
South Yarra – East	10.0
Fitzroy	9.5
South Melbourne	9.5
Fitzroy North	9.4
South Yarra – West	9.3
Collingwood	9.1
Hawthorn East	8.8
Southbank	8.8
St Kilda	8.8
Carlton	8.7
Northcote	8.7
Flemington	8.6
Abbotsford	8.5

“Only time will tell whether this new lifestyle still has legs.”



Liveability in a post-COVID world

COVID-19 turned living in Melbourne on its head in 2021, but the population of some suburban destinations are better equipped for a post-COVID world than others.

While the CityPulse 2021 Live metrics assess Melbourne's suburbs depending on whether its citizens have the option to work at home or not, the below score takes a deep-dive look at the types of jobs people across Greater Melbourne are doing – and therefore, the ability of certain suburbs to make the most of newfound flexible work options that have emerged since the pandemic. Because ultimately, while the potential for high liveability might have transcended further afield across Greater Melbourne as a result of COVID-19, a person's living experience in a post-COVID world will in part depend on the type of job they have, and how they do it.

In 2021, adapting to pandemic restrictions has invariably had differing impacts on our suburbs, taking into account their population's ability to work flexibly or from home. Some suburbs have become more attractive for those who work from home (Live – *Staying Local*), while others remain strong contenders for commuters (Live – *Commuting* score). All suburbs will enjoy varying degrees of flexibility in a post-pandemic world.

That's why PwC Australia has, for the first time, taken an individual approach to the working habits of suburbs, using census data to determine the types of jobs people have, and the flexibility they are afforded to do those jobs where they want – and when they want.

Our latest report '[What workers want](#)' shows Victorians value workplace flexibility, and as new work patterns emerge, we've created this new combined score that scales Live scores by the proportion of a suburb's population that can work remotely – to understand which suburbs will be more liveable for those who can work flexibly. Suburbs with a higher proportion of workers who can perform their roles remotely have naturally fared better than those suburbs full of workers who do jobs where they can't, or it's harder to work from home.

The top-scoring destinations are Northcote (scoring 10), Essendon-Aberfeldie, then Heidelberg-Rosanna due to a combination of having a high proportion of workers who are able to work flexibly, and the extent to which their suburb allows them to do so effectively.

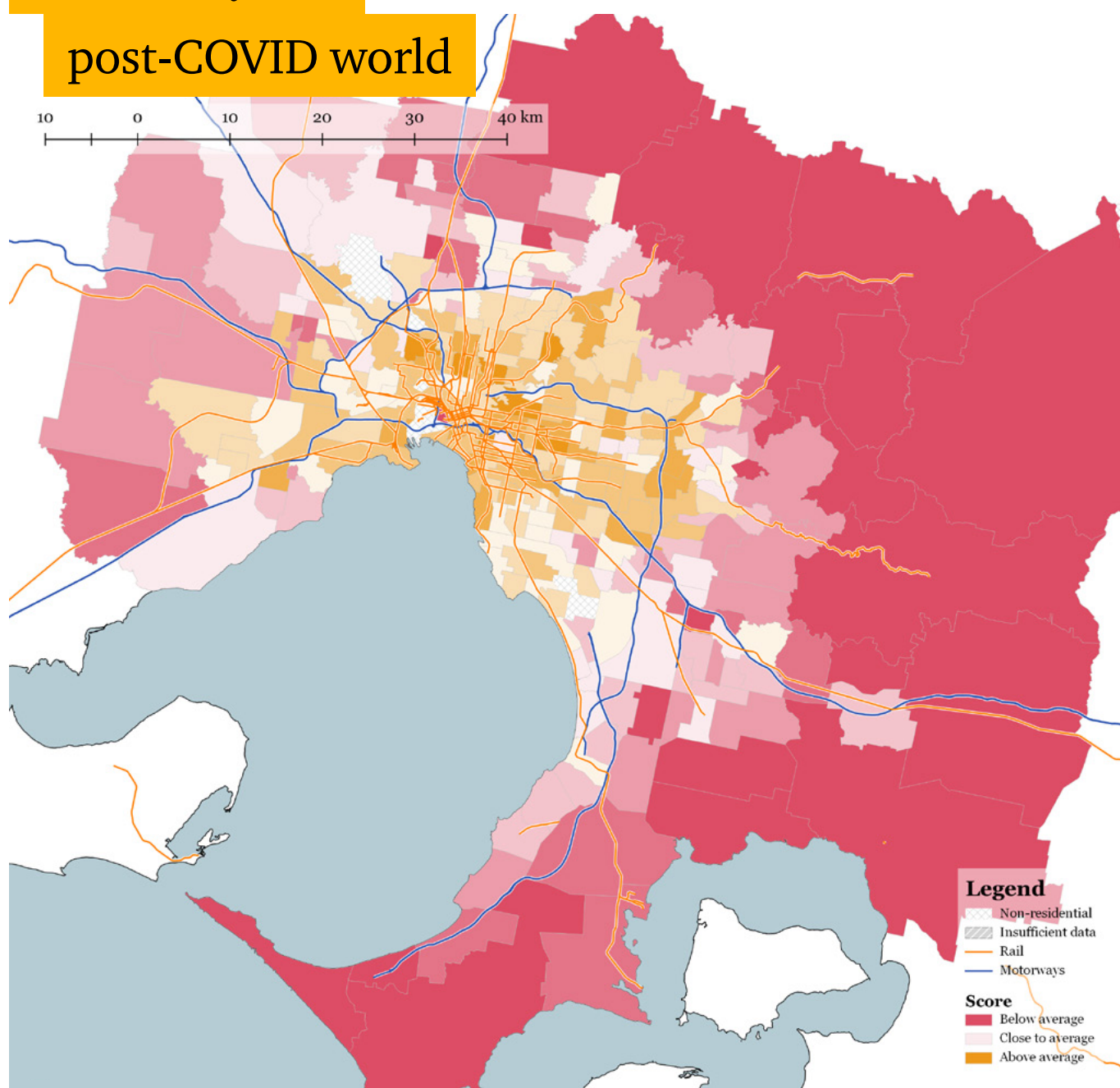


When it comes to delivering what Victorians value in a post-COVID world, this year's highest-performing suburbs (aside from the CBD) are primarily located in Melbourne's inner north and east, due to the combination of employment opportunities, local amenity and the population of locals who can choose the way with which they work:

- High-performing inner locations (less than five kilometres from Melbourne's CBD) include South Yarra-East and South Melbourne)
- High-performing inner locations (5-12 kilometres from Melbourne's CBD) include Brunswick, Camberwell, Kew, Malvern-Glen Iris, St Kilda and Brighton
- Northcote's nearby neighbour, Coburg, represents the city's inner-north suburbs in thirteenth place.

Suburb (SA2)	Score
Northcote	10.0
Essendon – Aberfeldie	9.5
Heidelberg – Rosanna	9.5
South Yarra – East	9.4
Brunswick	9.3
Camberwell	9.3
Kew	9.2
Melbourne	9.1
Brighton (Vic)	9.0
Malvern – Glen Iris	9.0
South Melbourne	9.0
St Kilda	9.0
Coburg	8.9

Liveability in a post-COVID world



Conclusion

What does this mean for Victorians?

As we embrace the other side of the pandemic, we have a rare opportunity to stop and consider what makes Melbourne great – and where we have work to do to ensure everyone shares the benefits of calling this world-class city home.

CityPulse 2021 identifies that while no business, industry or community has been immune from the impacts of the global pandemic, the burden has been felt by some communities more than others, particularly in Melbourne's outer growth corridors – so what does this mean for Victoria?

- Reimagined flexible work options triggered by COVID-19 creates opportunity for Victorians to **rethink their need to live in the inner-ring**, and instead trade away the skyrocketing land values for larger homes and more space, further afield, with many able to trade their daily commute for a shift at home instead.
- Communities across Melbourne, whether it's west of the Maribyrnong River, north of Bell Street or beyond East Link, are growing at rates faster than infrastructure, amenity and service delivery can accommodate. The **rise of employment hubs, activity centres and satellite 'mini cities'**, which localise employment opportunities and key amenities for people in outer suburban growth areas, closer to home could provide a viable solution. Much of this work is underway, but it could do with a push.
- **Contemporary transport plans will be key to keeping our communities connected.** For suburbs on the outer fringe, new models of mobility can overcome the tyranny of distance – micromobility modes (e-bikes and e-scooters), ridesharing and demand responsive transport can help these suburbs become just as accessible as the inner suburbs on this important metric. New bus routes and cross suburb connections like Suburban Rail Loop will help people keep connected between suburbs and improve access to work and leisure.
- These shifts in work places create unprecedented uncertainty for Melbourne's CBD, which has been disproportionately impacted by the overnight disappearance of its once-reliable steady stream of workers, shoppers and revellers. While many

surmise the end for the CBD, we're much more bullish for its future. Many workers will of course choose to return to their offices once the pandemic subsidies; **the challenge for the CBD will be to make this commute worthwhile**, by offering workers the full suite of benefits that cannot be enjoyed working remotely.

- Healthcare and education have experienced profound change throughout the pandemic, and will continue to evolve in a post-COVID world. The **rise in telehealth and other digital technologies will reshape the way Melburnians access healthcare**, while precincts such as Parkville and Monash present an innovative way of leveraging partnerships between healthcare bodies, higher education institutions and research facilities. With increasing demand for aged care, mental health care and disability workers, coupled with limited migration, the need to train and develop the next era of healthcare workers is greater than ever.

Melbourne has been tested like never before by the impacts of COVID-19, but our city is robust and resilient. As we reach the other side and ponder a return to normalcy, the challenge will be to think big, and be nimble enough to embrace the way the world has changed.

For Melbourne to truly roar once more, it must play to its strengths – an inclusive society, proudly multicultural, with a heaving arts, sports and entertainment offering that draws visitors from around the world. A city with immense opportunity when it comes to finding the right job and raising a family.

The 'new Victoria' promises enormous opportunities, but first, we must consider the profound impacts the pandemic has had on our city and state. We must leverage the few welcome developments unearthed by COVID-19, and find ways to address the shortcomings the pandemic has highlighted or created.

There's never been a better opportunity to stop and take stock of what makes Melbourne great – and what will make it even greater.

About CityPulse

What makes a city truly liveable? PwC Australia's CityPulse examines this question using a range of sources to assess a list of measurable indicators calculated to an SA2 level (an ABS statistical area about the size of a postcode).

The report considers not only economic factors but also what Victorians really want in their daily lives. As a state capital and rapidly-growing major city, Melbourne is tasked with providing its residents with economic opportunity, and a safe and enjoyable place to live, work, rest and relax.

Our resulting data-driven analysis offers important insight on the real-life issues that directly affect these communities, by mapping future demands against their current reality and priorities. Research that can help local government, business and communities with the strategy, planning and policy decisions required to effect real change.

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