



Make it your
Adelaide
Phase 2 / Ask / City

Shaping
Future Cities





Make it Adelaide

We're a group of South Australians who are working together to reimagine our state's future. And more than in any other state, transforming our capital city is key.

The first report in Deloitte's Make it Adelaide series built a vision for what South Australia can be – home to 2 million people by 2027, with economic growth fuelled by eight key sectors in line with the state's competitive advantages and global trends.

We believe that transforming Adelaide as a city will play an important role in achieving this goal.

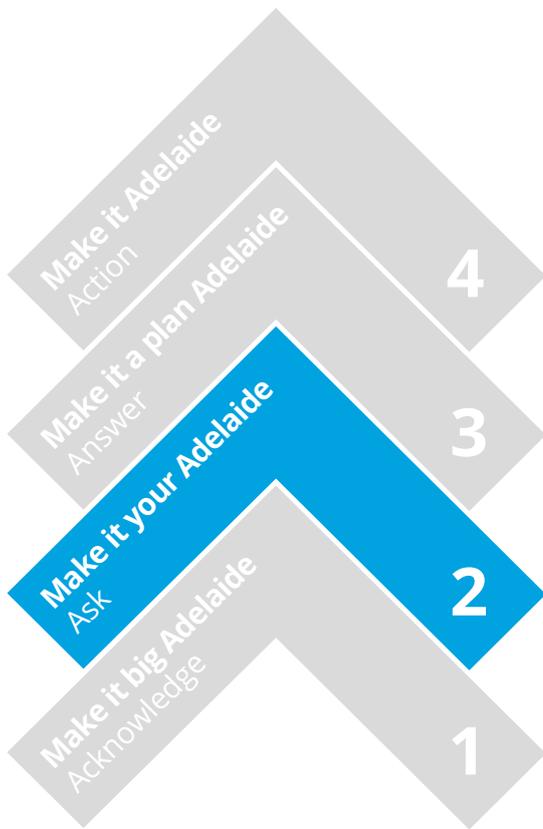
It's undoubtedly a transformation which has already started, particularly in the city centre. If you're travelling on the Popeye, change is everywhere you look: Adelaide Oval, the footbridge, a world-class health and biomedical precinct, new Convention Centre buildings. And soon, an upgraded casino and entertainment precinct on Festival Plaza, building on the significant potential of the North Terrace cultural precinct and the old Royal Adelaide Hospital site.

Walking through the city centre, you see laneway restaurants and nightlife unrecognisable a decade ago, and apartment towers rising above and filling the streets with life.

But the job's only half done. There's too many 'for lease' signs, and behind every for lease sign there's a blank canvas and a new opportunity. Now is the time to build on the transformation of the city and to step up the pace.

Going forward, this transformation must also extend beyond the central business district and into Adelaide's inner suburbs – where innovative ideas are already taking shape. For too long, the transformation of our city has stopped at the parklands, but a city is not thriving if the places where most people live are not alive too.

We must do this to create an Adelaide which is a compelling and exciting place to live, work and invest. Deloitte is committed to working with the community, business and government to develop ideas and solutions to strengthen the South Australian economy. We welcome you to join us on this journey as we identify the actions which will make these ideas a reality.



Phase 2

Make it your Adelaide > Ask

is engaging South Australian business, government and community leaders. We are running workshops and consultations to shape a future vision for the South Australian economy. Our final report will synthesise the refined ideas and diverse insights collected throughout this journey.

In the second phase of Make it Adelaide, we've spoken to business, government and community leaders to develop ideas for Adelaide's future as a city.

Five key themes emerged from our conversations: **infrastructure, liveability, risk taking, workforce and perception**. These themes span across all sectors of the economy and are used to synthesise diverse ideas with a common goal. The ideas presented in this report are the result of our consultations, in addition to further research.

The next paper in this phase will focus on the outer northern and southern suburbs of Adelaide and the regions of South Australia, and link into this paper through those five themes.

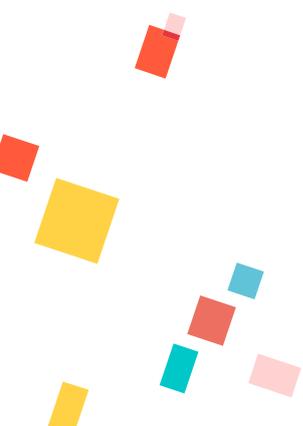
What this paper is and isn't

This paper isn't our final recommendations, or our final plan of action. That's coming in November.

This paper is, on the other hand, meant to spur debate and discussion about what a bigger Adelaide might look like.

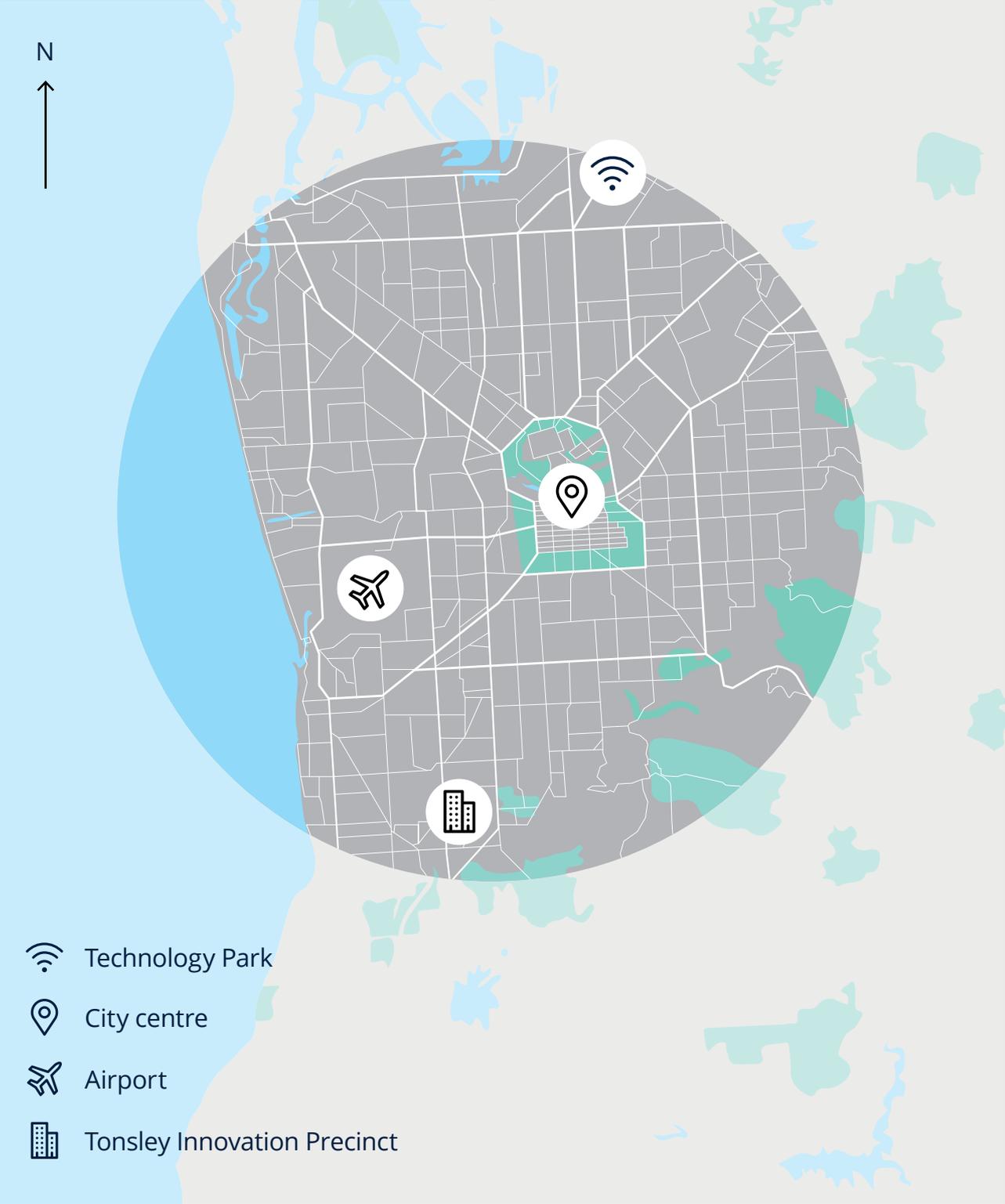
Between now and November, as we continue our work, we expect our ideas to continue to grow and change. Some of what's in here will make it, some of it will be discarded to history, and some will survive in a modified form.

The action plan will synthesise these ideas, develop outcomes and use economic modelling to paint a powerful picture of Adelaide in 2027.



Our city

The map below shows how we are defining Adelaide within this paper. Our next paper will address the outer northern and southern suburbs, and the regions of South Australia.



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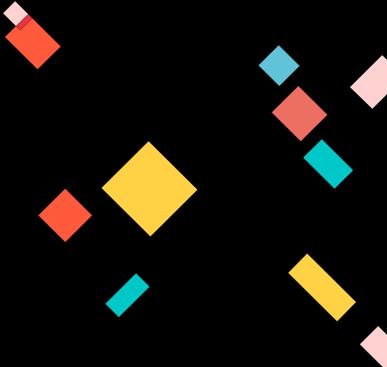
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Our sectors



International education



Defence industries



Energy and gas



Creative industries



Tourism



Health and medical industries



Agribusiness



Professional and information technology services



Executive summary

Remaking Adelaide is core to our economic growth

The first report in Deloitte's Make it Adelaide series built a vision for what South Australia can be – home to 2 million people by 2027, with economic growth fuelled by eight key sectors in line with the state's competitive advantages and global trends.

Transforming Adelaide as a city will play an important role in achieving this goal.

The city will play that role because many of the sectors where we need to grow rely on a vibrant, exciting city. Vibrancy is central to how we appeal to international students and tourists, but it's also vital in attracting and retaining the best and brightest workers to choose Adelaide as their home. These workers will power the growth of services industries such as technology and professional services, the health and biomedical sector and of course, creative industries.

Adelaide's transformation has already started, particularly in the city centre – with new development along the Riverbank and Festival Plaza setting the pace. But it's a job half done. There's still too many 'for lease' signs on the streets.

In this paper, we put forward a series of ideas which are intended to start a conversation about how we can transform Adelaide – and spur creativity and thinking among our leaders in business, government and the community about how we make Adelaide a place that we can believe in.

What does success look like?

When you think of the most successful cities in the world – what do they have in common? Are they busy and lively at night, or dark and deserted? Are public transport connections useful and efficient, or infrequent and impractical? Are they places that reward taking a risk, or punish failure?

An activated city is a city that's alive. One where people feel like they're part of something bigger. One where there's always something new to see or do. One which people decide to live in or visit as their first choice – not as a last resort. If we want to be one of the great cities in the world, we need a compelling offer for locals, visitors and people who might move here.

And we then need to tell this story far and wide. Because when you hear something's good, you give it a go. And if you like it, you'll come back for more – which is crucial to Adelaide's economic prosperity, and to create jobs for current and future generations of South Australians.



How do we find our way?

Five key themes emerged from our consultations when we talked about the future of Adelaide.

The first theme was **infrastructure**. All successful cities require great infrastructure – it forms the foundation of what’s to come.

The other themes were specific to Adelaide, and centre on our **workforce** and population, the **risk** aversion evident across the community, and our city’s **liveability** and how to preserve it whilst growing our population.

Finally, we need to think about **perception**. How we perceive ourselves and how we want others across the globe to perceive us as South Australians.

In this paper, we look at ideas to spur growth across our eight sectors which cut across these themes, as well as how Adelaide might become a bigger city without changing what we love about the place. Not all successful cities are mega cities: being a mid-sized city presents distinct advantages and opportunities.

Infrastructure as the foundation

Both physical and digital infrastructure are vital to connect Adelaide from suburb to suburb, region to region and onto the rest of the world. And as more opportunities arise overseas, it’s increasingly important that we can connect to global markets, not just the east coast.

But infrastructure takes time to build, especially in the middle of cities. This paper focuses on the infrastructure that is crucial for inner urban development; of course, energy, water and our freight infrastructure are just as key, and we’ll be talking about these topics in our next paper.

We must prepare now for a future where ultrafast internet is ubiquitous. Already, all levels of government are investing in rolling out broadband infrastructure, including the GigCity and Ten Gigabit City networks in Adelaide. But businesses need to grapple with how to best take advantage of these opportunities, and understand how this can accelerate their growth into global markets.

Physical infrastructure is no less important. In ten years, it’s likely that more people will be commuting in Adelaide than ever before – whether they’re using public transport or driverless cars. We can’t predict the arc of how these technologies might mature, but we still need to think about big plans for a bigger Adelaide. Melbourne and Perth were at similar populations to what Adelaide might be in 2027 when they started seriously considering an underground train loop – and projects of this scale should be on our horizon too.

One thing is for sure: cars and trucks, whether with human drivers or autonomous, will need to be travelling on a reliable, non-stop North-South Corridor, as well as other improved road infrastructure. Given the scale

of investment required, some of the money is almost certainly going to come from the private sector, and we need to plan for this now.

Our cultural and creative sector infrastructure is also important, both for tourists and locals: at its most basic, it’s international language signs, but it also includes the institutions recognising our cultural and indigenous heritage, and providing a unique visitor experience to travellers. We need to make smart investments in our cultural infrastructure, including displaying our world-class collections and resources that are currently stored away from view, and providing fully immersive digital experiences.

Attracting and retaining the best by providing the best lifestyle

Adelaide’s liveability is one of its key advantages, and will play a vital role in attracting the best and brightest to live in our state. By continuing to improve the liveability of Adelaide – through creating a place that’s affordable, safe, accessible and fun – we’re sending a positive message to international students, investors and workers.

But for Adelaide’s population to grow sustainably, we need to think beyond the CBD square. This requires a move away from Adelaide’s ‘hub and spoke’ design – with a central business district fed by outer suburbs – to an integrated ‘city of villages’ design.

As the name suggests, villages can be the nexus for servicing smaller, denser population groups where people can live within close proximity to where they work. Initially, the focus could be on the four villages of Adelaide’s CBD. But extending Adelaide’s tram network throughout the city and outward into the inner suburbs would provide the impetus for the development of villages outside the CBD, and serve as connections to other villages. These villages could even align with new areas connected to the GigCity network.



Taking more risks

The prevailing attitude in Adelaide is that South Australia ‘plays it safe’ and, in comparison to other places, is a slow adopter rather than an innovator. And, despite the wealthy people, families and corporations that call Adelaide home, our capital investors and benefactors are conservative in their attitudes toward risk. This is despite the strong history of social, cultural and industrial innovation across South Australia.

To foster a new wave of innovation, we first need to do better at identifying nascent talent, and recognising those who we should support without a full prior history of their success.

For innovation to take seed, it is imperative that the stigma around failure is minimised or removed entirely. Adelaide needs to change its attitude toward those who think big and take risks. Also, we can’t look to the Government to save us when we are in trouble – business has to get better at rejecting protectionist arguments and embracing competition as part of the global economy, and the Government needs to get better at saying ‘no’.

And for innovation to flourish in Adelaide, it needs to have room to grow. Austin, our sister city, has led the way in building an ecosystem and innovation hub in a mid-sized city to encourage innovation – and it’s a story we can learn lessons from here.

Attracting opportunity creators and ‘tastemakers’ – breaking out of the cycle

Adelaide’s population doesn’t just need to grow – it needs to grow sustainably, and in a way that develops a diverse workforce suited to the key sectors of our economy and future technologies.

Adelaide does a good job at educating its young, but too often, this educational advantage is quickly lost as our young leave for greener pastures both interstate and overseas. At the same time, skilled migrants choosing Australia as their home flock to Sydney and Melbourne, despite the lower quality of living.

For Adelaide to retain its young and build a skilled and innovative workforce, it first needs to attract and support people who can create the employment opportunities currently sought elsewhere. These people are opportunity creators and tastemakers: those from interstate and overseas with industry experience who can create meaningful employment and training opportunities, and from whom others want to learn from.

Going forward, it will be important that the migration system encourages and supports Adelaide to attract experienced workers from overseas. Improving the process to obtain permanent Australian working visas would go a long way, as would further promotion of the migration schemes that currently exist and which aren’t taken advantage of.

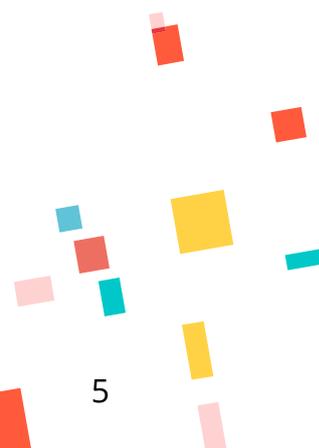
Shaking up our brand

The attitudes that pervade the way in which South Australians think about themselves are not only false, they are also self-defeating. By global standards, Adelaide is a mid-sized city: larger than Oslo, the capital of Norway, New Orleans in the United States, as well as the French cities of Toulouse and Bordeaux – all cities with strong global brands.

Many of the weaknesses perceived by South Australians about their state are considered to be strengths by those who visit. Visitors from abroad are often envious of the quality of life South Australians lead and how good we have it. Where many South Australians see Adelaide as quiet and small, those from overseas see it as a great place to live with affordable housing, clean air, beautiful beaches and plenty of open space, and a wonderful place to bring up a family.

To improve the visibility of South Australia and Adelaide in the eyes of others, we first need to improve how we think about ourselves and our place in the world. We need to start having conversations about the innovations that are happening and the innovators that are giving it a go. These need to be authentic conversations, rather than government propaganda, and these conversations need to be led by the private sector and by inspiring thought leaders.

It’s time for us to change our narrative and communicate it to the world.



1

Activating the city

“A good city is like a good party – you stay for longer than you plan.”
Jan Gehl

Why do we need an active, lively Adelaide?

Think of the most successful cities in the world: what do they have in common?

- Are they busy and lively at night, or dark and deserted?
- Are public transport connections useful and efficient, or infrequent and impractical?
- Are they places that reward taking a risk, or punish failure?

An activated city is a city that's alive. One where people feel like they're part of something bigger. One where there's always something new to see or do. One which people decide to live in or visit as their first choice – not as a last resort.

If we want to be one of the great cities in the world, we need a compelling offer for locals, visitors and people who might move here.

An offer born out of our creative industries, which can transform the feel of Adelaide outside the month of March.

An offer which retains our built and cultural industrial heritage, keeping us a little rough around the edges.

An offer which maintains our status as one of the best places to live in the world, but makes us one of the most exciting too.

An offer that rejects the naïve and lazy prescription of blindly copying Sydney or Melbourne – but one that embraces our differences, and learns the lessons good and bad of how those cities developed.

And we then need to tell this story far and wide. Because when you hear something's good, you give it a go.

And if you like it, you'll come back for more.

Which – in Adelaide's case – is crucial to economic prosperity.



How do we find our way?

There's a strong desire for South Australia to do better going forward. Through our consultations with stakeholders it emerged there is a clear aspiration to create a value-add economy that benefits all South Australians, built from a skilled workforce and demographically balanced population, and a culture that fosters innovation and productivity. It is also clear that to achieve this, South Australia needs Adelaide to be its healthy beating heart.

Adelaide needs to shape and project itself as a desirable place to live, with international appeal to both workers and investors. We need to provide meaningful employment opportunities for our young and talented. And we must develop a vibrancy that can be felt year round – the cosmopolitan feel that is inherent in built-up and densely populated centres. Balanced against this, however, is the equally strong desire for Adelaide not to become like everywhere else.

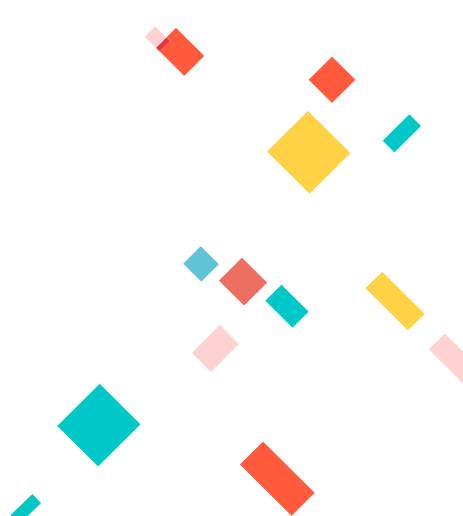
Growing Adelaide and achieving these goals is complex and multifaceted. It is important that in the pursuit of growth we don't lose sight of what we are trying to achieve or damage what we currently love about Adelaide. It requires carrying across the successful aspects of other internationally renowned cities, while also learning from their failings.

Throughout the consultation process, a large and diverse number of issues were raised from many different voices. However, in each of the conversations that we facilitated about the future of Adelaide, a similar pattern emerged. Conceptualised as the 'drivers' of Adelaide and South Australia, the issues raised can be categorised as belonging to one of five key themes.

The first theme was **infrastructure**. All successful cities require great infrastructure – it forms the foundation of what's to come.

The next three themes are specific to Adelaide and South Australia. They centre on our **workforce** and population, the **risk** aversion evident across the business community, and our city's **liveability** and how to preserve and enhance it as our population grows.

Finally, we need to think about perception. How we perceive ourselves and how we want others across the globe to perceive us as South Australians.



South Australia's drivers



Perception
Point of difference, brand and desirability



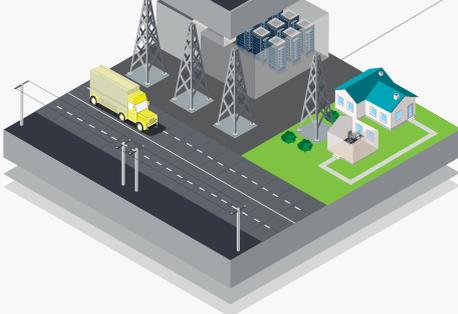
Workforce
Meaningful, future-thinking employment opportunities



Risk taking
Enterprise, innovation and production



Liveability
Housing, employment and lifestyle opportunities



Infrastructure
Physical and digital foundation

2

Infrastructure

Building a foundation from which to grow

Both physical and digital infrastructure are vital to connect Adelaide from suburb to suburb, region to region and on to the rest of the world. And as more opportunities arise overseas, it's increasingly important that we can connect to global markets, not just the east coast.

But infrastructure takes time to build. We must prepare now for a future where ultrafast internet is ubiquitous and more people are commuting in Adelaide than ever before – whether they're using public transport or driverless cars. Our cultural infrastructure is also important, both for tourists and locals: think international language signs, or institutions recognising our cultural heritage.



Digital connectivity: it's a small world after all

Digital connectivity has changed the way the world works. It's led to new products and services, greater consumer choice and employment opportunities through telework.¹

The size and speed of the information we send across the world has increased exponentially since the advent of the internet. Australians now download 57 times the amount of data they did a decade ago,² while the proportion of South Australians connecting to the internet increased from 50 per cent to 82 per cent between 2004-05 and 2014-15.³

And digital connectivity goes beyond the speed at which we can download a movie online. The technologies that comprise smart cities include sensors, the Internet of Things, real time data analytics and artificial intelligence. These technologies have the potential to change how we interact with cities and, importantly, how we can use physical infrastructure more efficiently. This will become critical as Adelaide's population grows.

While we don't know what the future looks like, it's certain that digital technologies will only become more important – and Adelaide needs to prepare for this future. Sectors such as professional and information technology services and creative industries rely on digital infrastructure. The ability to share data and information seamlessly and affordably will be key to reducing South Australia's distance from global markets, and attracting talented individuals to develop the high-tech industries of the future.

In addition to the National Broadband Network rolling out across Australia, Adelaide is already taking steps in the right direction. Current projects underway include:

- The South Australian Government's GigCity project, which is connecting businesses in 14 key innovation precincts across Adelaide to affordable high-speed internet at speeds of 1 gigabit per second⁴
- The Adelaide City Council's Ten Gigabit City project, which will link industry and universities to global markets through a 10 gigabit per second fibre-optic network, primarily to use for data transfer.⁵

Now we need to ensure we take advantage of these projects to their full potential, and continue to identify new opportunities for expansion and development. Is there any other digital infrastructure required in Adelaide to kick-start our sectors of growth? How do we build on these investments to obtain first mover advantage in emerging communication technologies? What will we need in five years' time? Ten years' time?



Gig City case study: Chattanooga

Chattanooga, Tennessee's fourth largest city, is experiencing something of a renaissance. Once a thriving industrial city known as the 'Dynamo of Dixie', Chattanooga's fortune turned in the 1980s. Manufacturing employment declined by 28 per cent, leading to 10 per cent decline in the city's population over the decade.⁶ But Chattanooga's investment into digital infrastructure is restoring the city's fortunes.

Chattanooga became a Gig City almost by accident. The one gig network was installed by the government-owned Electric Power Board (EPB) to monitor utilities systems for failure and usage – an example of smart city technology. But it was then relatively straightforward for the EPB to become an internet service provider, and so the first gig city in the United States was born in 2010.⁷

Chattanooga has since shown signs of a strong and growing local economy. It had the third highest wage growth of 53 midsize cities in the United States in 2014,⁸ and has an unemployment rate of only 3.3 per cent, well below the national average of 4.4 per cent.⁹ Chattanooga also now leads Tennessee in the number of business start-ups.¹⁰ Many start-ups are reliant on the fibre network, and chose Chattanooga as a base due to the fast internet speeds. These include Skuid, a cloud based, tailor-made app service, and Bellhops, which provides on demand moving services.¹¹

An independent study by the University of Tennessee estimated that the Gig City initiative delivered between \$865.3 million and \$1.3 billion in net economic and social benefits, and between 2,832 and 5,228 jobs, in the four years to 2015. The net benefits were calculated by measuring effects for four groups of beneficiaries: households, businesses, utilities and the community more broadly. These figures exceeded the original benefit estimates of the fibre installation.¹²



Physical connectivity: can we still be the 20-minute city?

No matter how far digital technologies develop, we will still need physical infrastructure to connect places within cities, and cities to the rest of the world. The nature and use of that infrastructure may change over time – with the uptake of autonomous vehicles, drones, smart technologies and telework already occurring. But as people and freight still need to get from point A to B, investment in physical infrastructure is critical. Good infrastructure is attractive in a city: whether you're considering studying in Adelaide from abroad, or investing in sectors which rely on efficient freight.

Our road network and freight

Autonomous technology will no doubt have a significant effect on the road network, with on-road trials already underway in South Australia.¹³ Any investments in physical infrastructure should consider the impacts of new technologies: what is required today may not be required tomorrow.¹⁴

But Adelaide has a congestion problem today, and without new investment, those problems will continue. Once the '20-minute city', commute times on Adelaide's key routes are substantially longer compared to 20 years ago.¹⁵ New technologies, such as sensors, may improve traffic flow, as may real time data and car-to-car communication.¹⁶ However, without considerable investment in Adelaide's cross-city road corridors, commute times will likely continue to increase.

The key projects identified in consultations are particularly important for the efficient transport of freight to Outer Harbor, including the North-South corridor and its connections to the South Eastern Freeway, and a non-stop South Road. Many parts of South Australia's economy are dependent on the efficient movement of freight along this corridor. Early planning can help avoid further congestion on our network.

To accelerate the development of these projects and others, it may be necessary to consider new approaches to financing infrastructure. These include public-private partnerships and road pricing. Private sector investment may have positive spillover benefits for South Australian investment, while road pricing may alter commuter behaviour, resulting in more efficient road use. Other existing technologies may also improve congestion, such as ridesharing and ridepooling, as well as better information systems for public transport encouraging greater use.

Public transport

Public transport will continue to be the most efficient way to transport large volumes of people to specific areas. Complemented by other forms of transport, buses, trains and trams can be used to travel from the outer suburbs to the city, as well as from suburb to suburb via interchanges. Or, rather, they should be able to: Adelaide is a car-dependent city,¹⁷ indicating a preference away from public transport.

Harking back to Adelaide's past, tram infrastructure is currently seen as central to Adelaide's public transportation system. Aside from taking cars off the road, there are other benefits to tram corridors: international evidence suggests that tram networks generate economic clusters, by improving liveability and business opportunities.¹⁸ We explore this in more detail in our chapter on liveability.

As Adelaide's population grows, there will be a greater need to move people from the outer suburbs to the inner suburbs as well as the CBD. Investments in rail infrastructure can ease road congestion, and deliver efficient transport times compared to personal or public road transport.

Of course, we haven't yet fully electrified the train system that we currently have. But, a decade from now, Adelaide will start to be around the same size that Melbourne and Perth were when they planned their underground city rail loops. It's already in the Integrated Transport and Land Use Plan, but current plans to pursue an underground rail loop in Adelaide should be a larger part of our public debate: Melbourne's experience (detailed further on page 14) suggests now is the time to start planning for this future.

Going forward, large-scale public transport (such as trains and trams) may interact with smaller-scale public transport (such as driverless vans or buses) to more efficiently move people across the city and between suburbs. Private investment could be leveraged to bring forward public transport infrastructure in appropriate timeframes.



Cycling infrastructure

Even though one of Australia’s premier cycling events is held in South Australia, Adelaide’s cycling infrastructure remains largely underdeveloped and our inbound city traffic too reliant on cars. That’s despite the fact that the personal and public benefits of cycling are well known, ranging from improved health to reduced road congestion, lesser wear and tear on road infrastructure, and lower carbon emissions.¹⁹

Many successful cities have invested heavily in cycling infrastructure: think Copenhagen, Utrecht and Strasbourg. We can use cycling infrastructure to efficiently link our inner-city areas in particular.

Integrating and developing Adelaide Airport

Going forward, private investment will be required to increase the capacity of Adelaide Airport, as it increasingly becomes pivotal in connecting South Australia to global markets. Adelaide Airport is a leader in our city in laying out a strong Master Plan, driven by private sector investment. The Airport Master Plan describes how the Airport will be a major driver of the state’s economic growth going forward.

Improved public transport would also provide benefits, with the vast majority of international and domestic tourists passing through Adelaide Airport. An integrated, reliable and frequent public transport system – such as a light rail service – would meet international standards for visitors, but perhaps more importantly, support one of the single largest sites for employment in South Australia.

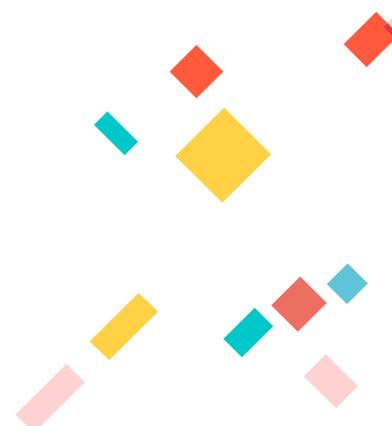
Cultural infrastructure and connectivity

The final aspect of infrastructure relates to cultural connectivity. We must not only adapt to accommodate a growing number of international visitors, but better recognise and display our own cultural and indigenous heritage.

In terms of international visitors, students and migrants, easy wins include international signage – particularly at Adelaide Airport and around the Adelaide CBD – as well as improved language capability, including dual-language programs such as those offered at Plympton International College. It’s well known that Adelaide’s higher-end hotel stock requires upgrading: an area ripe for private sector investment, and vital in boosting Adelaide’s tourism industry.

It’s also important to understand how others aspects of Adelaide’s infrastructure could be improved to better appeal to international visitors, and particularly the growing visitor segment from China. An upgraded Adelaide Casino, including a 6-star hotel, is a step in the right direction.

Beyond tourism infrastructure, we should also consider the inherent cultural capital we share as a city. There’s an opportunity to invest further in our North Terrace cultural precinct so that our major institutions can proudly display historical and contemporary artefacts, as well as to consider whether South Australia should have an integrated strategy to market the precinct as a whole.



All aboard: case study of the Melbourne City Loop

In 1969, Flinders Street Station was one of the busiest train stations in Australia. There were over 2.4 million people living in Melbourne,²⁰ and passenger flow during rush hours had reached congestion levels. The Melbourne Metropolitan Town Planning Commission recommended the construction of an underground city railway as early as 1929. However, it wasn't until 1969, when the Melbourne Metropolitan Transport Plan was released, that the concept became a reality. The Metropolitan Transportation Committee saw the Underground Rail Loop as a vital component of a balanced transport system for Melbourne, as it would address overcrowding at Flinders Street Station. The new City Loop would not only enable customers to reach their destination faster, but also bring them closer to their destination.²¹

The plan proposed an underground extension of the existing suburban rail system. Four separate tunnels were to be constructed, each with an average length of 3.7 kilometres, and would run under La Trobe and Spring Street and join up with the tracks alongside Spencer Street Station (now Southern Cross Station) and Flinders Street Station.²²

Work commenced in 1971 and the loop was completed in 1985.²³ In order to complete the five-station loop complex, three new underground stations were constructed, including Museum Station, Parliament Station and Flagstaff Station.²⁴ Nowadays, over 235.4 million journeys are taken on Melbourne's metropolitan train network each year,²⁵ and the population of Melbourne has almost doubled.²⁶ The Underground Rail Loop provides commuters with a choice of stations across the CBD, and has assisted in avoiding operational problems due to trains having to reverse direction at Flinders Street Station.²⁷ Today, the Victorian Government is investing in the Metro Tunnel project to further improve the efficiency of Melbourne's underground rail connections.²⁸



3

Attracting the best by providing the best lifestyle

Liveability

Adelaide's liveability is one of its key advantages, and will play a vital role in attracting the best and brightest to live in our state. By continuing to improve the liveability of Adelaide – through creating a place that's affordable, safe, accessible and fun – we're sending a positive message to international students, investors and workers.

But for Adelaide's population to grow sustainably, we need to think beyond the CBD square. This requires a shift away from Adelaide's 'hub and spoke' design, with a central business district fed by outer suburbs, towards an integrated 'city of villages' design.

A city of villages

Villages have developed historically in larger international cities as populations have increased and planners have sought to manage densification – think of the boroughs of New York City and London, or the arrondissements of Paris.

Rather than designing infrastructure to move an increasing number of people from expanding outer suburbs into the CBD, the goal should instead centre on a network of village clusters.

As the name suggests, villages can be the nexus for servicing smaller, denser population groups where people can live within close proximity to where they work. Villages would reduce traffic congestion and commute times by increasing the proximity between home and work, as well as servicing the needs of local populations. This would include cultural and civic centres, retail and entertainment precincts, school and education services, as well as facilities for health care, childcare and aged care.

Initially, the focus could be on the four villages of Adelaide's CBD:

- the East End (around Rundle Street and East Terrace)
- the West End (around Hindley Street)
- the Hutt Street village
- the South-West Corner (around Whitmore Square).

Each of these areas already has its own distinct personality, and surrounds our key commercial and leisure precincts like the Riverbank, Victoria Square and the Central Market, and Rundle Mall. The goal, therefore, is to consider how we market these areas as places to live, work and study. It's important that development is in line with the feel of each place, as we don't want to lose what we already have in favour of increased density or development.



Extending Adelaide’s tram network throughout the city and into the inner suburbs would provide the impetus for the development of villages in the areas which encircle the CBD, and serve as connections to other villages.

Housing density and affordability

A villages concept requires a change in how Adelaide approaches housing development and infrastructure. We need to increase population density around Adelaide’s inner suburbs to create a critical mass and support villages in their own right.

This requires a shift away from traditional housing expectations – typically a three bedroom house on a quarter acre block with a carpark.

Instead, people would need to choose to live in multi-storey dwellings with limited parking and shared facilities. This change is likely not to be as radical for younger generations compared to older ones: there is already some evidence to suggest that an inter-generational shift in housing preferences is underway, with millennials choosing to live in densely populated areas in close proximity to where they work and play. Comparing the 2006 and 2016 Census data shows that, on the whole, the proportion of people aged 15 to 34 living in inner city areas in Sydney and Melbourne has increased by around 3 percentage points.³⁰ Whether this reflects a true change in underlying preferences or is instead due to the limited set of choices that millennials face remains subject to debate.

Housing options available in the areas surrounding villages therefore need to be commensurate to – if not better than – those available in housing developments in the outer suburbs. For this type of development

to be viable, current building height restrictions, particularly those in the inner suburbs, would need to be relaxed. While the new Bowden development presents an exciting opportunity, it should be the start of a trend – not an isolated site.

Denser living can also improve housing affordability in the inner suburbs by increasing supply. This may be helpful to those currently priced out of the market – especially young people from cities across Australia.

While we’ve seen significant growth in housing in the CBD – which is particularly beneficial for international students and professionals working locally – alone it’s not enough to sustain our population growth. Developing villages across the inner suburbs can support other sectors, generating activity in areas which otherwise could miss out on the benefits of agglomeration.

Fostering communities

A new approach to housing development must not only be sustainable in the design and build, but also in how it creates a community.

Going forward, housing and the surrounding infrastructure should be designed with family, lifestyle and inclusivity in mind. Housing must be suitable to accommodate all stages of life, rather than blocks of apartments suiting only young professionals. Villages must cater to a diverse set of needs and wants: those of the young and unattached, families with children or older dependents, people with disabilities, and the elderly.

When planning for denser housing, it’s important to maintain accessibility to open, green, natural spaces. These include public spaces such as parks

and conservation areas, gardens and playing fields, as well as suitable outdoor spaces in private dwellings. Maintaining natural spaces is considered beneficial for mental and physical health.³¹ Another important objective for denser living is to keep it pet friendly.

Creating a ‘cosmopolitan’ feel

Villages generate a critical mass of people which maintain a cosmopolitan vibrancy at all times – thereby avoiding ‘dead spaces’ at different times of the day and over the course of the week.

This creates the right conditions to support businesses servicing the local population, such as retail, food and lifestyle outlets. Relaxing food and liquor licence restrictions in suburban areas (or at least within villages) can further create opportunities for small bars and restaurants to operate outside of business hours, and extend the cosmopolitan vibrancy that has been so successful within Adelaide’s CBD. Easing restrictions on retail trading hours across the Adelaide area also has the potential to create additional business opportunities, as well as providing greater flexibility for consumers.³²

In turn, the business activity created by villages may generate additional jobs and employment opportunities within Adelaide’s inner suburbs. The critical mass of people living in villages could also benefit and attract larger employers looking for workers within close proximity.



4

Risk taking

Genius is contagious

South Australia does a poor job of identifying talent, backing innovation and taking risks on unproven entities, people and products.

The prevailing attitude in Adelaide is that South Australia 'plays it safe' and, in comparison to other places, is a slow adopter rather than an innovator. And, despite the wealthy people, families and corporations that call Adelaide home, our capital investors and benefactors are conservative in their attitudes toward risk. This is despite the strong history of social, cultural and industrial innovation across our state.

Risk averse behaviour is deeply entrenched in South Australia, which adversely impacts the conception and actioning of ideas in terms of what can be achieved here. This affects all industries, from the smallest to the largest businesses.

Identifying nascent talent

To foster innovation, we first need to do better at identifying nascent talent, and recognising those who we should support without a full prior history of their success.

This may involve drawing upon the experience of accomplished South Australians to 'talent spot' or to recognise emerging talent within their industry or profession. Intergenerational mentorship and advocacy could also help nurture talent by providing introductions and access to opportunities that would not otherwise be available.

These initiatives could also assist in discerning good ideas from bad ones, and help to attract outside investors to back unproven individuals and their projects.



Backing innovation – and permission to fail

For innovation to take seed, it is imperative that the stigma around failure is minimised or removed entirely. Adelaide needs to change its attitude toward those who think big and take risks. This means celebrating those who give it a go, promoting their successes, and acknowledging that failure is a natural part of the learning process.

A big part of this is mindset. But there are other suggestions to help get new ideas off the ground – including government grants for small scale development and testing, and safety nets or incentives for those both willing to take risks and those willing to invest in risky ventures. Ideally, however, government should not be expected to intervene to encourage innovation. A number of programs already exist in South Australia which aim to support innovators: greater collaboration and connectivity to globally successful entrepreneurs could be key in driving a truly successful start-up culture. A physical innovation precinct (such as Tonsley) can also deliver the benefits of agglomeration – complementing a virtual ecosystem. Think MaRS in Toronto (a network of partners helping entrepreneurs tackle future problems), the developing Westmead precinct in Western Sydney (a health-focused educational and research precinct), or the IC² Institute and technology incubator in Austin, Texas. How can we better use Tonsley and other incubators to boost innovation?

Going forward, there are plenty of opportunities for the private sector and South Australian businesses to step up and make a difference. Recognising the existence of bias (both conscious and unconscious) that discriminate against unproven innovators or those without a history of success, and then removing these biases, could be important in encouraging investment. Employers can also look within their own workforces to encourage innovation, while research commercialisation at universities could be further enhanced.

Encouraging risk and overcoming protectionist attitudes

For innovation to flourish in Adelaide, it needs to have room to grow.

For this to occur, Adelaide needs to change its conservative attitude toward capital investment and the commercialisation of new ideas. One possible solution is to improve the competitiveness for financial capital within South Australia. This involves enticing capital investors, possibly with greater tolerances for risk, from outside South Australia to increase the supply of capital, thereby placing pressure on the conservative preferences of South Australian investors.

Another way in which innovation is deterred in South Australia is due to vested interests and the self-interest of incumbents who use their power to protect their market dominance and high capital returns from disruption or increased competition. Recognising and then giving less weight to protectionist arguments when planning and in making development decisions is where government has an important role to play. Understanding and removing bureaucracy that stymies innovation and investment is also another role for government to improve the conditions for innovation.



Case study: a tale of two cities and the path not taken



Today, Austin is home to one of the United States' most prestigious universities – the University of Texas at Austin – and is a city renowned for its influence in politics, technology and the arts. Austin is recognised as a successful high-tech city, mainly due to the presence of large technology companies like IBM, Apple, Hewlett-Packard, Google, Facebook and many others.³³ Austin has progressed from a small state capital and university town of under 400,000 in 1980,³⁴ to a leading technology-based region with a population of over 930,000 today.

However, this hasn't always been the case. Reminiscent of discussions about Adelaide today, Austin has experienced periods of deep economic decline, most recently in the late 1980s.

In the post-war period, Texas was primarily an oil-producing state, and was hit hard by the oil crisis of the 1970s and subsequent glut in the 1980s. Combined with an overextension of bank credit and rising speculation in commercial

real estate,³⁶ the real estate and banking sectors fell into recession.³⁷ In September 1986, the unemployment rate in Texas hit an all-time high of 9.2 per cent, one of the worst in the US.³⁸ Understanding how Texas escaped this economic slump provides an excellent case study for cities looking to reinvent themselves following a jarring structural economic change.

At the core of Austin's economic recovery was the very deliberate decision by the city's political, business and university communities to develop an 'ecosystem' to promote and foster innovation. It was recognised that technological innovation and risk neutrality can be a catalyst for regional economic development through active collaboration among the university, government and private sectors. Rather than following the traditional incubator model of governments 'writing cheques' or providing support to individuals, the Austin model instead brings together technical expertise and experience for the purpose

of helping start-ups to access capital and attain initial funding. Chief among this model was the establishment of the IC² Institute and the Austin Technology Incubator (ATI), an interdisciplinary research unit of the University of Texas at Austin. Analogous to a 'coral reef', the IC² institute and ATI act as the key players in bringing together, coordinating and maintaining Austin's innovative ecosystem.

Austin's entrepreneurial ecosystem supported the city through tough economic conditions. Between 2003 and 2012, it is estimated that the ecosystem generated more than US\$880 million in economic benefits for the Austin economy and created more than 6,520 jobs.³⁹ An additional benefit of the wealth created is the pool of start-up capital that has been subsequently generated for investment in new ventures.

5

Workforce

Where great minds come together

Adelaide's population doesn't just need to grow – it needs to grow sustainably, and in a way that develops a diverse workforce suited to the key sectors of our economy and future technologies.

Adelaide does a good job educating its young. Beyond secondary school, young Adelaidians have a plethora of opportunities to further their formal education at world-class universities or one of our many vocational education providers.

Too often, however, this educational advantage is quickly lost as our young leave for greener pastures both interstate and overseas. At the same time, skilled migrants choosing Australia as their home flock to Sydney and Melbourne, despite the lower quality of living.

Retaining our young – a chicken or the egg dilemma

Our issues in retaining the best and brightest in Adelaide aren't new here, nor across the world. But it's felt acutely in Adelaide by virtue of its population size.

We face a 'chicken or the egg' dilemma when it comes to the composition of Adelaide's workforce and population. The issue we face is that our current economy simply isn't retaining the educated workers necessary to build a knowledge economy; the type of economy that, into the future, will attract skilled and talented workers, as well as retain its young.

The dilemma, of course, is how to innovate and build a future economy without the necessary people and skills? The challenge is in breaking this cycle.

Breaking the cycle – the 'pied piper' versus 'brain drain' effects

To break the cycle, it is necessary to first understand how we became trapped.

Young graduates leave to pursue opportunities in more populated and cosmopolitan destinations, both interstate and overseas. Often, never to return. Calling this a 'brain drain', however, is a misnomer for what's really happening.

We lose our youngest and most talented workers because of a 'pied piper' effect. Our young don't necessarily leave because of a lack of jobs. They leave because of the allure of employment opportunities that are available elsewhere.

This is the difference between the availability of jobs that pay the bills and the availability of jobs that offer experience and rewarding opportunities. These jobs capitalise on the formal education of the young by utilising and further developing their skills and, in turn, provide meaningful work and offer rewarding career opportunities.



Attracting opportunity creators and tastemakers – breaking out of the cycle

For Adelaide to retain its young and build a skilled and innovative workforce, it first needs to attract the types of people who can create the employment opportunities currently sought by our young elsewhere. These people are opportunity creators and tastemakers: those from interstate and overseas with industry experience who can create meaningful employment and training opportunities, and from whom others want to learn.

Having digital infrastructure in place, as well as the business conditions to foster innovation and risk taking, will go a long way to attracting such experienced individuals to Adelaide. Opportunity creators and tastemakers are also likely to be older and at the stage in life where they are looking to balance their career with the needs of family and children. Unlike Sydney or Melbourne, Adelaide's liveability gives us a unique advantage in offering the right lifestyle opportunities.

Going forward, it will be important that the migration system encourages and supports Adelaide to attract experienced workers from overseas. Improving the process to obtain permanent Australian working visas would go a long way, as would further promotion of the migration schemes that currently exist and which aren't taken advantage of. One important change could be to loosen the criteria

imposed by skilled occupation lists and, instead, place more weighting on work experience. Other changes also include removing red tape around migration by streamlining existing processes to reduce time delays, and also improving the process to obtain working visas for partners.

New technologies

Over the next decade, it is anticipated that developments in artificial intelligence⁴⁰ (AI), machine intelligence and automation technologies will increasingly take the place of workers' human capital. While advances in technology haven't always come at the expense of jobs and occupations, it's the pace at which these new technologies arrive that will have a transformational effect on South Australia's economy.

Given the long lead time involved in training and skill development, it is imperative that South Australia starts preparing its workforce now. The advancement of AI and automation technologies leads us to the question: which skills can humans use to add value in ways machines just can't?

Machines can perform boring, dangerous or repetitive tasks at costs much lower than that of a worker, but they cannot think creatively about complex problems that involve the interpretation of qualitative facts, or use emotional judgement to aid in decision-making – human capabilities which are termed 'soft skills'. Though

technical skills will still be important, Deloitte expects two thirds of all jobs in Australia to be soft skill intensive by 2030. As such, soft skills will need to be stressed in an education system that complements an increasingly automated world.⁴¹

An obvious implication will be the continued demise of traditional manufacturing and blue-collar jobs. However, as the costs of automation reduce over time, these technologies will increasingly threaten white-collar jobs, especially those involving repetitive tasks. Further, it is expected that the trend toward automation will occur faster in countries with higher costs of labour, such as Australia.

The types of jobs that are expected to be at least risk from automation are those that involve a high degree of creativity and require the continual development of skills. There is a clear need to develop soft skills and increase the diversity of jobs which are least at risk of automation. The table on the following page shows the most common occupations in Adelaide (that is, those representing the top 25 per cent of Adelaide's workforce) which are expected to be at most risk and at least risk of automation.

There's also an opportunity to link this development to our eight key sectors in line with the state's competitive advantages and global trends – how do we foster skills in developing AI in defence, or blockchain in food security?



The future of work

The way people work will continue to change in the future. We've already explored some of the effects of automation and AI, but other technologies are also disrupting the workforce. The gig economy continues to grow, and could expand to new sectors going forward. Ultrafast internet means that people can communicate seamlessly with colleagues and clients around the world. This technology, along with shifts in the occupational composition of the economy towards services jobs, may also mean that workers are less wedded to a physical location, such as a factory or office. One of the challenges for South Australia is to design the right environment and

conditions for people to make Adelaide the place they choose to live when they could live anywhere. Developing our digital and physical infrastructure, along with the right support systems and attitudes, will be crucial in achieving this goal.

It's also important that our future workforce has the right skills to tackle the problems of tomorrow. Digital literacy will be increasingly vital, and needs to be taught in educational institutions, along with creativity and critical thinking. Our education and training must be aligned with the sectors that will drive our economy – we can't wait until our jobs are reinvented or new technologies turn up on our shores.



At most risk of automation	At least risk of automation
Accounting clerks	Secondary school teachers
Checkout operators and office cashiers	Office managers
General clerks	Primary school teachers
Accountants	Retail managers
Sales assistants	Aged and disabled carers

Source: Australian Bureau of Statistics⁴² and the Department of Industry, Innovation and Science⁴³

6

Turning weakness to strength

Perception

Many of the weaknesses perceived by South Australians about their state are often considered to be strengths by those who visit or relocate here. Visitors from abroad are often slightly envious of the quality of life South Australians lead and how good we have it. Where many South Australians see Adelaide as quiet and small, those from overseas see it as great place to live or raise a family, with affordable housing, clean air, beautiful beaches and plenty of open space.

The re-brand

South Australia needs to again find the magic that set it apart from other places in Australia throughout its history. We most recently found our mojo during the infamous Dunstan era. During this period, South Australia put itself back on the map by making radical social and cultural changes, as much as economic leaps and bounds. South Australia developed points of difference that were unlike any of the other cultural and economic opportunities available elsewhere in Australia, if not the world. And people noticed.

To regain this mantle, we need to stop being shy and playing it safe in our approach toward social and economic opportunities. Adelaide needs to shape itself into a destination like nowhere else. This means being progressive by being contrarian economically and a little more edgy socially. This kind of development comes from fostering a risk tolerant and innovative environment to attract talented and energetic people.

Perception is everything

"...It's just like a big country town..."

"...You can't make it in Adelaide..."

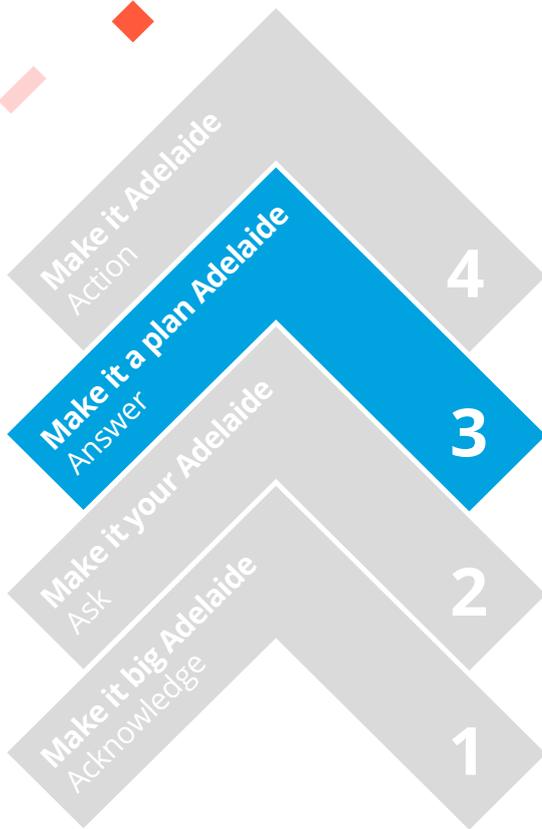
These are the types of attitudes that pervade the way in which South Australians think about themselves. These attitudes, however, are not only false, they are also self-defeating. In fact, by global standards, Adelaide is a mid-sized city; larger than Oslo, the capital of Norway, New Orleans in the United States, as well as the French cities of Toulouse and Bordeaux.

We as South Australians need to change our perceptions before changing the perceptions of others. Our attitude is now self-fulfilling and is one of the biggest obstacles to development and growth in South Australia.

South Australia needs to stop being so concerned about what others think and start playing to its own tune. To improve the visibility of South Australia and Adelaide in the eyes of the world, South Australians first need to improve how we think about ourselves and our standing in the world. We need to start having conversations about the innovations that are happening and the innovators that are giving it a go. These need to be authentic conversations, rather than government propaganda, and these conversations need to be led by the private sector.

It's time for us to change our narrative and take the message to the world.





Phase 3

Make it your Adelaide > Answer

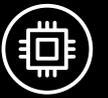
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