

# NOTICE OF MEETING

## COUNCIL AGENDA & REPORTS

for the meeting

commencing at 07:00 PM on Monday, 22 August 2022

Council Chambers  
72 Woodville Rd, Woodville SA 5011

**PAUL SUTTON**  
**CHIEF EXECUTIVE OFFICER**

**Dated 18 August 2022**

Please advise Kerrie Jackson if you are unable to attend this meeting or will be late. Phone 8408 1115.



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## 1. COUNCIL OPENING

### 1.1 OPENING PRAYER

Almighty Father from Whom all goodness flows, grant unto us qualities of wisdom justice and tolerance, that we the civic leaders of this community may govern in harmony and concord.

This we ask in Thy name.

We also remember and give thanks for those, our sons and daughters, who gave their lives for Australia.

Lest we forget.

Niina Marni is Kurna for ' Welcome'. The City of Charles Sturt acknowledges and pays respect to the traditional custodians of the land, the Kurna people of the Adelaide plains. We pay our respect to Elders past, present and emerging. We respect their spiritual beliefs and connections to land which are of continuing importance to the Kurna people of today. We acknowledge the contributions and important role that Aboriginal people continue to play within our local community in Charles Sturt. We also respect the culture of Aboriginal people visiting from other areas of South Australia and Australia.

### 1.2 APOLOGIES AND LEAVE OF ABSENCE

## 2. CONFIRMATION OF MINUTES

### 2.1 COUNCIL

#### Brief

Confirmation of the minutes of the previous meeting held on Monday, 8 August 2022.

#### Recommendation

**That the minutes of the previous meeting held on Monday, 8 August 2022 be taken as read and confirmed.**

## 2.2 REPORTS OF COMMITTEES - PART I

### 2.2.1 ASSET MANAGEMENT COMMITTEE

#### Brief

The Asset Management Committee was held on Monday, 15 August 2022.

#### Recommendation

That having considered the recommendations of the Committee which has read and considered the reports in the agenda related to items:

**4.48 FLINDERS PARK OVAL UPGRADE - PETITION**

**4.49 RENOWN PARK - LIVING STREETS INITIATIVE - OUTCOMES OF CONSULTATION AND FINAL CONCEPT DESIGN**

**4.50 WHOLE STREET PLANTING 2023**

**4.51 ASSET MANAGEMENT SERVICES CAPITAL WORKS & OPERATING PROGRAM VARIATIONS**

**4.52 STORMWATER MINOR UPGRADE - FLOOD MITIGATION - 2022/23 PROJECT UPDATE**

**4.53 HINDMARSH PRECINCT UPGRADE - PROJECT UPDATE**

**4.54 MILITARY ROAD AND MAIN STREET UPGRADE AND PUBLIC PLAZA - PROJECT UPDATE - APRIL TO JUNE**

**4.55 ST CLAIR RECREATION CENTRE - YMCA QUARTERLY REPORT - APRIL TO JUNE 2022**

**4.56 COMMUNITY GARDENS AND LOCAL AMENITY GROUPS - QUARTERLY ACTIVITY REPORT - 2**

Council adopts the recommendations of the Committee as printed in the Minutes of this Committee.

### 2.2.2 CITY SERVICES COMMITTEE

#### Brief

The City Services Committee was held on Monday, 15 August 2022.

#### Recommendation

That having considered the recommendations of the Committee which has read and considered the reports in the agenda related to items:

- 3.01 DEPUTATION - WEST LAKES RESIDENTIAL AND MIXED USE CODE AMENDMENT
- 4.18 WEST LAKES RESIDENTIAL AND MIXED USE DRAFT CODE AMENDMENT (PRIVATELY FUNDED) - FOR CONSULTATION
- 4.19 ALBERT PARK MIXED USE DRAFT CODE AMENDMENT (PART-PRIVATELY FUNDED) - FOR RECOMMENDATION TO THE MINISTER FOR PLANNING
- 4.20 KIDMAN PARK RESIDENTIAL AND MIXED USE DRAFT CODE AMENDMENT (PRIVATELY FUNDED) - FOR RECOMMENDATION TO THE MINISTER FOR PLANNING
- 4.21 RELEASE OF THE STATE PLANNING COMMISSION'S MISCELLANEOUS TECHNICAL ENHANCEMENT CODE AMENDMENT FOR CONSULTATION
- 4.22 EVENTS AND FESTIVALS SPONSORSHIP - RECOMMENDATIONS FOR FUNDING
- 4.23 COUNCIL ASSESSMENT PANEL - JUNE 2022 QUARTERLY REPORT
- 4.24 HERITAGE CONSERVATION GRANT APPLICATIONS

Council adopts the recommendations of the Committee as printed in the Minutes of this Committee.

### 3. REPORTS

Nil

### 4. DEPUTATIONS

#### 4.20 DEPUTATION - CYCLE PATH ENTRY NORTH FROM TERMINUS STREET ON SEAVIEW ROAD/ESPLANADE, GRANGE

**TO** Council

**FROM:** Governance Officer - Aaron Galanti

**DATE:** 22 August 2022

#### **Brief**

A deputation request was received from Dr Bruce Kristian Foster who is requesting to speak to Council in regards to agenda Item 6.75 regarding the cycle path entry North from Terminus Street on Seaview Road/Esplanade, Grange.

#### **Recommendation**

1. That the deputation be received and noted.
2. That Dr Bruce Kristian Foster be thanked for his presentation and any notes that comply with Council's Code of Practice for Meeting Procedures and the laws of defamation, be included in the Minutes.

#### **Deputation**

A deputation request was received from Dr Bruce Kristian Foster who is requesting to speak to Council in regards to agenda Item 6.75 regarding the cycle path entry North from Terminus Street on Seaview Road/Esplanade, Grange.

## 5. PETITIONS

Nil

## 6. BUSINESS

### 6.73 LOCAL GOVERNMENT ELECTION SIGNS

**TO:** Council

**FROM:** Manager Public Health and Safety - Adam Filipi

**DATE:** 22 August 2022

#### Brief

Changes to Section 226 of the Local Government Act 1999 relating to Moveable Signs, arising from the Statutes Amendment (Local Government Review) Act 2021, now prohibit the display of local government electoral advertising posters made of corflute or plastic on public roads and related infrastructure.

This report and accompanying presentation provides an overview of the changes made to the Local Government Act 1999 in relation to local government election posters and provides a new guideline to aid candidates when displaying electoral advertising materials.

#### Recommendation

- 1. That the report be received and noted.**
- 2. That the presentation notes be included in the minutes.**
- 3. In response to the amendments to the Local Government Act 1999, Council's Election Signs Policy, as presented in Appendix 1, be revoked.**

#### Status

This report relates to or impacts upon the following Community Plan Objectives 2020-2027.

#### Our Community - A strong and connected community

In our City no one gets left behind; everyone has access to quality resources, services, programs, information and social infrastructure to fully participate in their community. Charles Sturt is made up of strong and vibrant communities; we celebrate our identity; heritage and cultural diversity. People feel a sense of belonging, inclusion and social connectedness.

**Our Leadership - A leading & transformational Local Government organisation**

Our values, leadership and collaborative approach are bold and courageous and enables us to deliver value for our Community and create a leading liveable City.

We provide excellence in customer experience by ensuring our customers are at the heart of everything we do.

Open and accountable governance.

**Relevant Council policies are:**

- Election Signs Policy
- Enforcement Policy

**Relevant statutory provisions are:**

- Local Government Act 1999
- Statutes Amendment (Local Government Review) Act 2021
- Local Government (Elections) Act 1999
- City of Charles Sturt's By-Laws 2021
- Planning Development and Infrastructure Act 2016

## Background

Changes to Section 226 (Moveable Signs) of the Local Government Act 1999 arising from the *Statutes Amendment (Local Government Review) Act 2021*, now prohibit the display of electoral advertising posters relating to elections held under the Local Government Act 1999, or the Local Government (Elections) Act 1999 on a public road (including any structure, fixture or vegetation on a public road). Prior to this change, the display of local government election posters, irrespective of their composition, was enabled via an express permission in the Local Government Act 1999, during the period commencing four weeks immediately before the date that had been set for polling day and ending at the close of voting on polling day.

In addition to the Local Government Act 1999, a General Approval was granted by SA Power Networks (SAPN) and the Department for Infrastructure and Transport (DIT), (the Relevant Authorities), which enabled the display of election signs relating to State, Federal and Local Government elections on public road infrastructure, owned by these Relevant Authorities. This General Approval also provided the consent required for the purposes of Section 23(1), of the Local Nuisance and Litter Control Act 2016 in relation to Bill Posting.

Amendments to Section 226(5) of the Local Government Act 1999, resulting from the *Statutes Amendment (Local Government Review) Act 2021*, now define **electoral advertising posters** as a poster displaying electoral advertising content made of corflute, plastic or any other material, or kind of material prescribed by regulation. At the time of writing this report, no regulations were in operation prescribing any additional construction materials. It is these electoral advertising posters that are now prohibited to be displayed on a public road (including any structure, fixture or vegetation on a public road).

**Local government election sign** is not defined in the Local Government Act 1999, however is generally considered to mean a moveable election advertisement, notice, or election sign (not made of corflute or plastic, i.e. not an electoral advertising poster), which is intended to affect the result of an election. Whilst these signs are not prohibited by the Local Government Act 1999, they may only be displayed where they do not unreasonably restrict the use of the road or endanger members of the public and comply with the requirements of Council's By-laws. It is noted that candidates will need to comply with all requirements of the SAPN/DIT General Approval in order to display election signs (not Posters), on infrastructure on a road owned by these two Authorities.

## Report

Amendments to Section 226 of the Local Government Act 1999, which commenced on 10 November 2021, now prohibit the display of electoral advertising posters on all public roads and related infrastructure. An electoral advertising poster (Poster), is defined in Section 226(5) of the Local Government Act 1999 to mean a poster displaying electoral advertising made of:

- (a) corflute;
- (b) plastic; or
- (c) any other material, or kind of material, prescribed by regulations\*

\*no other materials have been prescribed by regulation at this time.

The display of election signs made from other materials than those defined above may be displayed where these signs do not unreasonably restrict the use of the road, or endanger the safety of members of the public. It must however be recognised that these election signs must still comply with the SA Power Networks (SAPN), and Department for Infrastructure and Transport (DIT), General Approvals.

Candidates may obtain permission from a private property owner, which could include the primary lease holder of a property based upon the lease agreement, for the display of local government election signs and posters. Candidates will need to consider whether development approval is required based upon the requirements of the Planning, Development and Infrastructure (General), Regulations 2017. In this regard, consideration to Clause 1(f) of Schedule 4 of the Planning, Development and Infrastructure (General) Regulations 2017, should be made that stipulates the grounds in which the display of election material requires development approval.

The City of Charles Sturt has a [Moveable Signs By-law](#) in place, which regulates the placement of moveable signs within the Council area. Specifically, this By-law exempts application of its requirements where the sign relates to a local government election, but nominates adherence with Section 226 of the Local Government Act 1999. In addition Council's [Local Government Land](#) and [Roads By-laws](#), also provide exemptions to their application in reference to electoral matters authorised by a candidate relating to an election, where this material is displayed commencing four weeks immediately before the date that has been set for polling day and ending at the close of voting on polling day. For the purposes of the upcoming November 2022 Council elections, the relevant period for the display of local government election signs commences on 13 October 2022 and concludes at 5pm on 10 November 2022.

As a consequence of the amendments to the Local Government Act 1999 in relation to Section 226, in addition to the application of Council's By-laws, Council's previous Election Signs Policy, as presented in **Appendix 1**, no longer has legal application. It is therefore recommended that the Election Signs Policy be revoked. In its place, a Guide for Local Government Election Signs, as presented in **Appendix 2**, has been developed to provide guidance and consistency for candidates. This Guideline has been based upon a model document created by the Local Government Association to aid in consistency with election sign materials being displayed in the public realm across South Australia.



### **Financial and Resource Implications**

There are no financial or resource implications.

### **Customer Service and Community Implications**

The Guidelines to Display Local Government Election Signs fact sheet, as presented in **Appendix 2**, will be made available on Council's public website to aid in providing candidates and the general public information on the legal requirements and expectations in relation to the display of electoral advertising posters and local government election signs.

### **Environmental Implications**

Changes to Section 226 (Moveable Signs) of the Local Government Act 1999 arising from the commencement of the Statutes Amendment (Local Government Review) Act 2021, prohibiting the display of electoral advertising posters (i.e. a poster displaying electoral advertising made of corflute and/or plastic), has been introduced to minimise the environmental impacts associated with these posters. It is understood that a Bill, to consider the prohibition of the display of electoral advertising posters made from these same materials, is likely to be presented to State Parliament by the Liberal Party to equally apply to State Government elections, based upon the same environmental benefits.

### **Community Engagement/Consultation (including with community, Council members and staff)**

There is no requirement for community engagement or consultation.

### **Risk Management/Legislative Implications**

This report has been presented to outline the amendments and associated impacts to electoral advertising posters relating to local government elections, pursuant to the Local Government Act 1999.

### **Conclusion**

Amendments to the Local Government Act 1999 arising from the commencement of the Statutes Amendment (Local Government Review) Act 2021, now provide a distinction between the display of electoral advertising posters and general election signs, determined by the material utilised to manufacture the electoral material. The use of corflute or plastic is now specifically prohibited for manufacturing and display of election material, to aid in reducing environmental impacts from local government elections.

These changes to the legislation may be difficult for the general public to understand. To aid in their application, a Guideline has been produced which will be published on Council's public website, to provide clarity and consistency with the display of election materials in the public realm.

**Appendices**

#	Attachment
1	Appendix 1 - Election Signs Policy
2	Appendix 2 - Guidelines to Display Local Government Election Signs

# APPENDIX 1



# Election Signs Policy

<b>Reference Number:</b>	2.11
<b>Type:</b>	Council Policy
<b>Category:</b>	Corporate Governance
<b>Relevant Community Plan Outcome:</b>	<ul style="list-style-type: none"> <li>• Provide accessible social infrastructure and services that engage our diverse community.</li> <li>• Capitalise on partnerships, build community resilience and sense of belonging.</li> <li>• Create opportunities for community leadership and civic participation.</li> <li>• Be bold and innovative in our practices, leadership and decision making.</li> </ul>
<b>Responsible Officer(s):</b>	Manager Public Health & Safety
<b>First Issued/Approved:</b>	February 1998
<b>Minutes Reference:</b>	Cos 4/11/2019, Item 3.54
<b>Last Reviewed:</b>	November 2019
<b>Next Review Due:</b>	November 2021
<b>Applicable Legislation:</b>	Local Government Act 1999 Local Government (Elections) Act 1999 (for Local Government Elections only) Development Act 1993 Electoral Act 1985 Commonwealth Electoral Act 1918 Criminal Law Consolidation Act 1935 Australian Road Rules
<b>Related Policies:</b>	By-Laws Register
<b>Related Procedures:</b>	None

## 1. Purpose

The City of Charles Sturt recognises the importance of free speech and political campaigning (as supported by the Electoral Act 1985). The purpose of this policy is to:

- Achieve clarity of the position and consistency of approach within the Council area;
- Enable the issue to be applied consistently and equitably to all political parties and candidates;
- Minimise any threat to public safety from the placement of the signs;
- Recognise SA Power Networks and the Department of Planning, Transport and Infrastructure (DPTI) as they relate to their respective interests, thereby enabling a single approval (from Council) covering the interests of all three parties;
- Incorporate the legislative requirements relating to Election Signs.

## 2. Scope

This policy covers the control and placement of Election Signs as they relate to Local Government, State Government and Commonwealth Government elections. Councils do not have the power to regulate the content of electoral signs.

## 3. Policy Statement

Council acknowledges the desire for political campaigning, including the placement of electioneering signage, and therefore allows for signage to be posted, affixed or erected on property under the care and control of Council, SA Power Networks or Transport Services Division of the Department of Planning, Transport and Infrastructure (DPTI) for the purposes of candidate promotion in Federal, State or Local Government elections, as long as it is undertaken in line with Council's Election Signs Policy.

### Summary

A person may place and maintain free-standing moveable signs (such as a-frames, sandwich boards, etc) on footpaths and road reserves within public roads (i.e. on the ground, and not attached to, or leaning against, any object in the road) without requiring prior authorisation from the Council, provided:

- the sign is related to a State or Commonwealth election and is displayed during the period commencing with the issuing of the writ(s) for the election and ending at the close of polls on polling day, or
- the sign is related to a Local Government election and is displayed during the period commencing 4 weeks before the date set for polling day and ending at the close of voting on polling day, or
- the design and structure, the positioning of the sign and any other relevant requirements of the Development Act and any applicable Council by-law are complied with.

A person may place or affix a moveable sign, or place it against, any infrastructure (including poles, light poles, traffic signs, traffic lights, trees, fences, bridges etc), whether the infrastructure is owned or under the care, control and management of the Council, DPTI or SA Power Networks, where that infrastructure is located on, in or across public roads or public places.

Council is, pursuant to the relevant Instruments of Authorisation and General Approval, permitted by SA Power Networks and DPTI to grant approval for the placement or affixation of moveable signs on or leaning against infrastructure that those entities own or that is under their care, control and management.

### 3.1 Election Signs in Public Places

Prior to any signs (that are not freestanding moveable signs placed on a road) being posted, affixed or erected on infrastructure on a road that is under the care and control of Council, SA Power Networks or DPTI for the purposes of candidate promotion in Federal, State or Local Government elections. Candidates should familiarise themselves with Council's Election Sign Policy to ensure any signage placed out in the local community is done so safely and orderly.

### 3.1.1 Election Signs must:

- (a) not be more than 1 square metre in area. A back to back sign facing two directions is considered to be one sign for this purpose. Size requirements of electoral advertisements are also specified in section 115 of the Electoral Act 1985 (For private fences a larger area is permissible – please refer to 3.1.4 below);

Please note: Places designated as polling booths/places for Federal and State Elections and Referenda will not be subject to this requirement on polling day only.

- (b) only be displayed, in the case of State and Commonwealth elections, during the period commencing on the issue of the writ or writs for the election and ending at the close of polls on polling day. Should the signs not be removed within two days (48 hours) of the close of voting they will be considered illegal signs/posters and Council will implement the provisions of this policy (please refer below to 3.2: Illegal signs);
- (c) only be displayed, in the case of Local Government elections, during the period commencing 4 weeks immediately before the date set for polling day and ending at the close of voting on polling day. Should they not be removed within 2 days (48 hours of the close of voting) they will be considered illegal signs/posters and Council will implement the provisions of this Policy, (please refer below to 3.2: Illegal Signs). In the event that the nominated candidates are declared elected unopposed, all of their election signs/posters must be removed within 48 hours of such declaration and notice. Should the signs not be removed within 48 hours they will be considered illegal signs/posters and Council will implement the provisions of this policy (please refer below to 3.2: Illegal Signs);
- (d) comply with all legislative requirement relating to the publication of 'electoral material' as defined in relevant legislation;
- (e) be securely fixed or posted and maintained in good repair and condition at all times;
- (f) be designed, made, and presented in a quality manner (the intent is that signs must not tear apart and become a danger to road users and end up as litter);
- (g) contain clear and legible writing or symbols;
- (h) contain on the face of the sign, the name, phone/email and address of both the person authorising the promotional material (publisher) and the printer of it;
- (i) be fastened securely so that they cannot become detached in high winds and endanger Council, SA Power Networks or DPTI property or equipment or pose a danger to the public.
- (j) be installed, maintained and removed in a safe manner without endangering personal and community safety.

### 3.1.2 Election Signs must not:

- (a) be illuminated (internally or indirectly), move, flash, rotate, or reflect so as to be an undue distraction to drivers;

- (b) be self-adhesive or taped on. All individual promotional material affixed under the terms of this consent may only be affixed by non-invasive means that do not cause damage of any type to the structure to which the material is affixed. If a paste is to be used, it must be of a water based/wallpaper type (or similar);
- (c) be affixed under any circumstances to trees, shrubs, or other plants or at any location that may cause damage to Council, SA Power Networks or DPTI property;
- (d) be placed on a carriageway, dividing strip (median), traffic island, roundabout, or within 50 metres of a signalised intersection, level crossing, roundabout or pedestrian activated crossing;
- (e) be placed within 6 metres of an intersection or junction, or in any other location that may pose a hazard to pedestrians or road users;
- (f) be attached to any traffic control device, street name, traffic direction or parking sign or to the associated pole;
- (g) be erected on poles or towers carrying electricity transmission lines (these are generally lines utilising greater span lengths with significantly taller poles or towers supporting electrical wires);
- (h) be attached to SA Power Networks pad mounted transformers or switching cubicles;
- (i) be attached to the fence or other enclosure of any sub-station of SA Power Networks;
- (j) be placed so as to cover any Council, SA Power Networks or DPTI signs or markings;
- (k) be placed on DPTI structures with the exception of "gooseneck" light poles belonging to DPTI. Structures which belong to DPTI, include road bridges on arterial roads, traffic control boxes, traffic signal poles, signal boxes, traffic signs and other traffic control devices, guide posts and pedestrian fences located within the road reserve;
- (l) be placed in a location on a pole or fence so as to aid the climbing of the pole or fence;
- (m) be placed so as to restrict the sight distance for road users and pedestrians crossing the road;
- (n) compete with or reduce the effectiveness of other signs and traffic control devices;
- (o) resemble a traffic control device, or reasonably be capable of being mistaken by road users as a traffic control device;
- (p) advertise any organisation other than a registered political party or candidate;

**3.1.3** Where signs are fixed or posted on poles adjacent to footpaths or roadways such signs must not be lower than 2 metres and a maximum height of 3 metres from the ground with nothing above the sign to affix it or anything else to the pole. Signs must have a minimum clearance of 3 metres from any overhead mains. There is a total prohibition on any part of the sign being higher than 3 metres from the ground.

- 3.1.4** Signs on private fences, including those adjoining Council land, shall have a total advertisement area of not more than 2 square metres and be limited to one sign per candidate/party per site/location.
- 3.1.5** The person or party responsible for the sign must maintain the sign. The person or party is also responsible for ensuring that safety is maintained (and the Australian Road Rules complied with) whilst the sign is being installed or removed and no traffic disruption is to occur during the installation or removal process.
- 3.1.6** This authority does not cover railway or tramline structures such as level or pedestrian crossings, bridges, stations, signalling equipment or fences adjacent to railway and tram lines. In this regard, information on the various rules and if appropriate, permission to enter or erect signs in these areas must be obtained from the relevant rail authority.
- 3.1.7** Where properties of Council are managed by others, Council may delegate to the Management Committee of that body the right to determine its own policy for election advertising, subject to relevant legislation. In such cases, written consent of that body is to be obtained. Upon request by the Council, the applicant must produce such written consent.
- 3.1.8** The person(s) to whom consent is granted and any persons acting on their behalf, accept full responsibility for any personal injury, damage or loss in any way arising out of or consequent upon the display of election material and acknowledge(s) that the Council, SA Power Networks or DPTI have no liability or responsibility in relation to such matters whatsoever and such person(s) agree(s) to indemnify Council, SA Power Networks and DPTI against any such personal injury or property damage or other loss incurred by the Council, SA Power Networks or DPTI and against any third party claims arising out of or consequent upon the erection, removal or display of signs.
- 3.1.9** SA Power Networks may direct the immediate removal of, any signs or remove or cause to be removed any signs without notice from any poles or structures and owned or managed by SA Power Networks notwithstanding that consent to erection of such signs may have been previously given by Council.
- 3.1.10** If SA Power Networks removes any signs under any condition of these Guidelines, SA Power Networks may dispose of the sign as it sees fit and may recover any costs of removal and/or disposal from the person or party responsible for the signs.
- 3.1.11** It is a condition to the granting of consent that if any breach occurs which results in action by or on behalf of the Council to enforce the conditions of this policy and thereby results in costs and expenses for the Council, then such costs and expenses will be recovered by the Council from the person(s) responsible. These costs will include removal and/or destruction of the offending material by an officer or agent of the Council.
- 3.1.12** Should the applicant propose to use property belonging to any party - other than Council, SA Power Networks or DPTI - they must firstly obtain the written consent of that third party. Upon request by the Council, the applicant must produce such written consent. In cases where there is property involved belonging to any other party, Council approval will be subject to all of the relevant matters contained in this policy.
- 3.1.13** The person or party responsible for the sign must remove all parts of the sign and fixtures from the site when removing the sign and within 48 hours from the close of voting in the relevant election.



- 3.1.14** Installing, maintaining and removing sign must not be carried out between 7:00am and 10:00am or between 3:00pm and 7:00pm Monday to Friday on a peak flow traffic lane.

A breach of, or non-compliance with, any of the conditions of this Policy will invalidate the consent and may result in a report being prepared for consideration by Council with a view to prosecuting the offender.

### **3.1.15 Moveable Signs**

Section 226 of the Local Government Act 1999 specifies the legal requirements for moveable signs. Council's by-law for regulating moveable signs (By-Law No. 2 – Moveable signs) does not apply to election signs where it relates to:

- a State or Commonwealth Government election and is displayed during the period commencing on the issue of writ or writs for the election and ending at the close of polls on polling day; or
- an election held under the Local Government Act 1999 or the Local Government (Elections) Act 1999 and is displayed during the period commencing 4 weeks immediately before the date that has been set (either by or under either Act) for polling day.

Where an election sign does not come under these provisions, the requirements specified in By-Law No. 2 for moveable signs will apply. A person authorised by Council may order the owner to remove the sign, or if the owner is unknown or fails to comply immediately with the order, may remove and dispose of the sign (refer Section 227 of the Local Government Act 1999).

### **3.1.16 Development Act 1993**

Signs may be "development" requiring approval under the *Development Act*. Signs will not be development if they fall within one of the exceptions to the definition of "development" contained in Schedule 2 or Schedule 3 of the *Development Regulations 2008*.

- signs which are "moveable signs" as defined in the Local Government Act are not development if they are placed on a public street, road or footpath.
- other signs, including moveable signs which are not placed on a public street, road or footpath (called "advertisements" and "advertising displays" in the Regulations) are not development if:
  1. they are displayed on a building or building in separate occupation (other than the side or rear walls of a building) used primarily for retail, commercial, office or business purposes, subject to the following conditions:
    - that the advertisement is not displayed or erected above any verandah or the fascia of a verandah or, in a case where there is no verandah, that no part of the advertisement is more than 3.7 metres above ground level; and
    - that the advertising display:
      - does not move; and
      - does not flash; and
      - does not reflect light so as to be undue distraction to motorists; and
      - is not internally illuminated;

2. for signs not displayed on commercial, office or business purpose buildings:
  - the total advertisement area of all advertisements of the same kind displayed on one building or site is not more than 2 square metres; and
  - that the advertising display:
    - does not move; and
    - does not flash; and
    - does not reflect light so as to be undue distraction to motorists; and
    - is not internally illuminated;

All signs which do not fit within these exemptions must be approved under the Development Act before they are placed on roads or affixed to buildings or structures.

Further, where advertisements are not authorised under the Local Government Act, or the Local Government (Elections) Act, Council has the power to serve a notice on the owner or occupier or land on which an sign is located directing that person to remove or obliterate the sign where the advertisement or hoarding:

- disfigures the natural beauty of a locality;
- detracts from the amenity of a locality; or
- is contrary to the character desired from the locality under the Council's Development Plan.

### **3.1.17 Council Owned Land / Private Land**

No Election Signs may be placed on Council-owned land or infrastructure or on private land or infrastructure without the permission of the Council or the private land owner, as the case may be.

## **3.2 Illegal Signs**

Council is totally opposed to illegal signs as a form of advertising.

If advice is received that signs have been affixed that restrict the use of a road, or endanger the safety of the public or have been affixed or displayed contrary to the requirements in this policy or remain in place after the deadline for removal, the following procedure will be followed by Council staff:

- 3.2.1** An officer of Council will notify the organisation/persons by phone, facsimile, email or letter, requesting removal of the signs within 48 hours.
- 3.2.2** If the signs are not removed within 48 hours, Council will arrange for immediate removal or paint over the offending signs and Council will charge the resultant cost to the parties responsible.
- 3.2.3** If evidence can be obtained of persons affixing the offending sign, this information will be referred to the relevant officer for possible legal proceedings.

### 3.3 Enforcement

#### 3.3.1 Non-Compliance with Policy and Legislation

A breach of, or non-compliance with, any of the conditions of the policy will invalidate the consent and may result in a report being prepared for consideration by Council with a view to prosecuting the offender.

In accordance with Section 234 of the Local Government Act 1999, Council may remove and dispose of any object (which includes an election sign) which has been placed on a public road in an unsafe manner, and, recover the cost of doing so.

Penalties apply for non-compliance with legislation or by-laws relating to publishing and distribution of election material and election sign placement. Refer to City of Charles Sturt Fees and Charges Register for the cost of removal relating to illegal election signs. Specific penalties also exist under legislation relating to election signage and material.

A person who deposits rubbish (which includes litter) is guilty of an offence (refer Section 22 of the Local Nuisance and Litter Control Act 2016).

#### 3.3.2 Interference with Election Signs

It is an offence under the Criminal Law Consolidation Act to steal or deface an electoral sign or poster. Any alleged offence will be referred to the SA Police for their attention.

#### 3.3.3 Misleading or Inaccurate content of Electoral material

In accordance with Section 28 of the Local Government (Elections) Act 1999 and Section 113 of the Electoral Act 1985, it is an offence to publish electoral material that purports to be a statement of fact and yet is inaccurate and misleading to a material extent. Any complaints made in relation to content of electoral signs for Local Government (Elections) Act 1999 will be referred to the Electoral Commission SA or the Electoral Commissioner for investigation.

### 3.4 Commonwealth Elections

The Commonwealth Electoral Act 1918 specifies the requirements for electoral signage as it relates to Commonwealth elections (refer Australian Electoral Commission website at [www.aec.gov.au](http://www.aec.gov.au)).

## 4. Definitions

Key Term – Acronym	Definition
Elections	to be interpreted to include Periodic and General Elections, By-elections and Supplementary Elections, Referenda and Polls.
Road	to be interpreted within the definition of road under the Local Government Act 1999 and for the purposes of clarification extends from property boundary to property boundary.
Signs	to be interpreted as a poster/sign that comprises an advertisement for a candidate or party in the election, or for a referendum or poll whether held for Federal, State or local government purposes. For the purposes of this policy the definition does not include movable signs.

# APPENDIX 2



## Guidelines to Display Local Government Election Signs

These Guidelines have been developed to provide local government candidates with information on the appropriate display of election signs in the public realm.

### Illegal signs

Section 226(2a) of the *Local Government Act 1999* prohibits the display of an **electoral advertising poster** on a public road. An **electoral advertising poster** means a poster displaying electoral advertising made of—

- (a) corflute; or
- (b) plastic; or
- (c) any other material, or kind of material, prescribed by the regulations.

A **local government election sign** is not defined in the Local Government Act. For the purpose of this Guideline, local government election sign means a moveable election advertisement, notice, or election sign (not made of corflute or plastic, i.e. not an electoral advertising poster) which is intended to affect the result of an election, and which can be moved or removed without causing any damage to the infrastructure or land upon which it is placed or attached. All local government election signs are a type of moveable sign.

### Local government election signs (not being an electoral advertising poster) must:

1. only be displayed during the period commencing 4 weeks immediately before the date that has been set for polling day and ending at the close of voting on polling day. Should the local government election sign not be removed within two days (48 hours) of the close of voting they will be considered illegal signs and penalties may apply.
2. be fastened securely so that they cannot become detached in high winds and endanger Council, SAPN or DIT property or equipment or pose a danger to the public.
3. be maintained in a good state of repair and no more than 1 square metre in area.
4. comply with all legislative requirements relating to the publication of 'electoral material' as defined in relevant legislation.
5. be installed, maintained, and removed in a safe manner without endangering personal and community safety.

### Local government election signs (not being an electoral advertising poster) must not:

1. be illuminated (internally or indirectly), move, flash, rotate, or reflect so as to be an undue distraction to drivers.
2. be self-adhesive or affixed under any circumstances to trees, shrubs, or other plants or at any location that may cause physical damage to Council, SAPN or DIT property.

3. be placed on a carriageway, dividing strip (median), traffic island, roundabout, or within 50 metres of a signalised intersection, level crossing, roundabout or pedestrian activated crossing.
4. be placed within 6 metres of an intersection or junction, or in any other location that may pose a hazard to pedestrians or road users.
5. be attached to any traffic control device, street name, traffic direction or parking sign or to the associated pole.
6. be placed so as to cover any Council, SAPN or DIT numbering, signs, or other markings, or compete with or reduce the effectiveness of other signs and traffic control devices.
7. be placed so as to restrict the sight distance for road users and pedestrians crossing the road.
8. where signs are fixed or posted on poles adjacent to footpaths or roadways, they are to be no lower than 2 metres and no higher than 3 metres from the ground. They are to have a minimum clearance of 3 metres from any overhead mains.

These Guidelines **do not** extend to infrastructure that is owned by SAPN or DIT on a road. The **SA Power Networks and Department for Infrastructure and Transport General Approval for placement or affixation of local government election signs** sets out the requirements for placement of local government election signs on this infrastructure. Furthermore, Adelaide Metro or the Australian Rail Track Corporation are the relevant authorities to gain permission to display signs on their infrastructure.

### **Installation, maintenance, removal and disposal of local government election signs**

1. installing, maintaining, and removing signs should not occur between 7.00am - 10.00am or between 3.00pm - 7.00pm Monday to Friday on a peak flow traffic lane.
2. whilst there are prescriptive rules relating to the permitted materials for electoral advertising posters, there is no prohibition on fixings made of plastic (such as a cable tie). Fixings made of metal or other conductive material are not permitted.
3. the person responsible for the sign must maintain the sign and ensure that safety is maintained (and the Australian Road Rules complied with) whilst the sign is being installed, maintained, or removed and no traffic disruption is to occur during the installation, maintenance, or removal process.
4. all election signs must be removed within 48 hours from the close of voting.
5. an authorised officer of the Council may remove and dispose of any election material (including electoral advertising posters and election signs) that does not comply with the legislative requirements of the *Local Government Act 1999*.

### **Private land**

These Guidelines do not authorise the placement of local government election material on private land or infrastructure without the permission of the private landowner, and dependent on the size<sup>1</sup> of the sign, relevant development approval under the Planning, Development and Infrastructure Act.

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<sup>1</sup> See Clause 1(f) of Schedule 4 to the *Planning, Development and Infrastructure (General) Regulations 2017*.

**6.74 PRESENTATION - ECONOMIC DEVELOPMENT STRATEGY 2022-26 FOR ENDORSEMENT**

**TO** Council

**FROM:** Coordinator Economic Development - Selma Barlow

**DATE:** 22 August 2022

**Brief**

Council had in place an 18-month Economic Development Recovery Strategy 2020-2022 to guide the recovery from the COVID-19 pandemic. This strategy has now reached the end of its life cycle and a draft Economic Development Strategy and Action Plan 2022-2026 was presented to the City Services Committee in May 2022.

The draft Economic Development Strategy 2022-2026 was presented to the City Services Committee on 16 May 2022 (refer **CIS 16/05/2022, Item 4.10**) and endorsed by Council 23 May 2022, for the purposes of community and stakeholder engagement.

The City Services Committee at its meeting in May requested that a presentation be given to full Council at the conclusion of the community and stakeholder engagement, so that all members were able to ask questions and participate in the finalisation of the Strategy.

The purpose of this report is to provide an overview of the consultation undertaken with the community during June and July 2022, what feedback was received and to highlight any changes made to the draft Economic Development Strategy 2022-2026.

A presentation by staff will be provided in support of this report.

**Recommendation**

- 1. That the report be received and noted.**
- 2. That Council endorse the City of Charles Sturt Economic Development Strategy 2022-2026.**
- 3. That staff be thanked for their presentation and a copy be included in the Minutes.**

**Status**

This report relates to or impacts upon the following Community Plan Objectives 2020-2027.

**Our Community - A strong and connected community**

In our City no one gets left behind; everyone has access to quality resources, services, programs, information and social infrastructure to fully participate in their community.

**Our Liveability - A liveable City of great places**

Support diverse events and experiences that bring people together and contribute to the history, culture and vitality of our neighbourhoods.

**Our Environment - An environmentally responsible & sustainable City**

Charles Sturt is recognised as a leading partner and educator pursuing a sustainable future with our community.

Reduced waste production across our city, combined with the growth of our circular economy..

**Our Economy - An economically thriving City**

The Western Region economy is promoted through leadership and collaboration across all stakeholders and our community.

Local businesses and entrepreneurial activities flourish through the support, engagement and relationships that are developed and maintained.

Businesses and industry sectors continue to grow and diversify.

Our businesses and community have the skills for success to realise job opportunities.

**Relevant Council policies are:**

- Building Western Adelaide 2021-2024 - Western Regional Economic Development Strategy and Action Plan
- Economic Development Recovery Strategy 2020-2022

**Relevant statutory provisions are:**

- Nil

**Executive Summary**

Council has completed comprehensive stakeholder and community engagement processes for the Economic Development Strategy 2022-26, as seen in **Appendix 3**.

Feedback received online, while limited, was supportive. Feedback received through two round table discussions with key stakeholders provided additional insights into the City's business environment. Further written and comprehensive feedback was also received from WACRA.



## Background

Council has delivered an economic development strategy that guides our role, priorities and approach to the City's economic development initiatives for the last nine years.

The City of Charles Sturt Economic Development Recovery Strategy 2020-2022, endorsed in November 2020, was an 18-month action plan created to guide our City's economic recovery from the COVID-19 pandemic. The action plan focused on bringing energy to the recovery and highlighted Council's role in leading and facilitating the recovery of our business community and instilling business confidence. This strategy has now reached the end of its life cycle; therefore, a draft Economic Development Strategy and Action Plan 2022-26 was prepared.

To inform the preparation of the strategy an in-depth analysis of the current and forecast economic trends was undertaken and included in the background paper: Charles Sturt Economic Trends and Forecast Report (**Appendix 1**). A summary of the key issues, challenges and opportunities were included within the Draft Economic Development Strategy and Action Plan 2022-26. Also included within the strategy were the results of the City of Charles Sturt Business Climate Survey 2022 and actions proposed to address the issues raised.

The draft Economic Development Strategy 2022-2026 was considered for consultation at the City Services Committee on 16 May 2022 (refer **CIS 16/05/2022, Item 4.10**) and endorsed by Council at its 23 May meeting.

This report provides an overview of the consultation undertaken with the community from 10 June to 8 July 2022, the feedback received, and the changes made to the Economic Development Strategy and Action Plan 2022-26 as a result of this consultation.

## Report

### Engagement on the Draft Economic Development Strategy

The Community Engagement Summary Report (**Appendix 3**), summarises the community and stakeholder engagement process and feedback received.

Community and stakeholder engagement was undertaken over a four-week period from 10 June to 8 July 2022, using a variety of communication and engagement techniques including the following:

#### *Communication Techniques*

- City of Charles Sturt Website
- City of Charles Sturt social media platforms
- Western Business Leaders e-Newsletter
- Council's *Your Say Charles Sturt* interactive online engagement website
- Emails and/or telephone calls to key stakeholders

#### *Community Engagement Techniques*

- Online engagement via our interactive website *Your Say Charles Sturt*
- Two round table sessions with key stakeholders
- Online Feedback Form available via the *Your Say Charles Sturt* website
- Ability to provide feedback via email or post
- Incentive provided to complete the business survey in the form of a business advice voucher

### Online Surveys and Written Submissions

The Your Say project page had 367 visits and 296 unique visitors. 157 people downloaded the Economic Development Strategy and 31 people downloaded the Economic Trends and Forecast Report.

Despite the high visitation rates, only 9 online surveys were completed. Three written submissions were also received, including a comprehensive submission by WACRA.

A summary of the engagement activities and reach from the consultation period are summarised in Table 1 of the Community Engagement Summary Report refer to **Appendix 3**.

Several common themes from the online survey were identifiable from our analysis, as follows:

### Economic Development Vision and Strategy

The Economic Development Strategy vision and draft strategy rated highly amongst those engaged and feedback showed alignment with the priorities in the action plan.

- Businesses and residents engaged hope the strategy will:
  - Facilitate vibrant neighbourhoods.
  - Improve job opportunities in the Council area.
  - Support businesses and creative industries.
  - Provide opportunities for small businesses to interact and collaborate.
  - Encourage businesses to be “inclusive” rather than exclusive.
  - Attract visitors to the Council area to visit businesses, parks and activated areas.

The top responses in the following areas were as follows:

- Important 'business friendly' initiatives:
  - Make it easy to start and grow a business.
  - Understand the needs of our businesses.
  - Advocate for business and key infrastructure.
  - Demonstrate strong leadership, collaboration, and partnerships.
  - Champion our community business leaders.
- Important 'diverse and advanced economy' initiatives:
  - Support Buy Local initiatives.
  - Connect local businesses to business support programs.
  - Support the growth and recovery of the visitor sector.
  - Encourage and facilitate business to business connections.
- Important 'knowledge and innovation' initiatives:
  - Promote and create pathways to employment.
  - Develop people's entrepreneurial capabilities and digital skills.
  - Support the local innovation ecosystem and encourage entrepreneurship and innovation.
- Important 'vibrant and liveable city' initiatives:
  - Facilitate and promote attractive and vibrant neighbourhoods.
  - Grow local creative industries.
  - Lead and support environmental goals.

Respondents also pitched a number of economic development ideas. The most common ideas included the promotion of small business, pop up promotions and markets and recycling and plastics re-processing.

The submission from WACRA was supportive of the focus on economic, social and environmental outcomes, although encouraged more consideration of urban development and climate change emergency risks. WACRA made a recommendation to further include our indigenous people and within the 'Knowledge' section, urged Council to consider the merger of the universities as an opportunity to bid for a Western campus.

### **Round Tables with Business Representatives and Key Stakeholders**

Two roundtable sessions were facilitated and attended by 20 representatives from local businesses from a variety of industry sectors, including the key growth sectors identified in the strategy. Key stakeholders and senior Council staff also attended.

The following feedback was received:

### **Further Ways that Council could Support Business**

- Co-working - Investigate opportunities for new co-working spaces and put together modelling and business cases for innovation precincts with a university presence. Promote existing co-working spaces.
- Offer networking opportunities.
- Offer workshops on digital marketing, grant writing, website design and branding.

### **Ways Council can Support Events**

- Offer grants and funding for small and large businesses, and events.
- Offer a bigger pool of funding to attract events that could make a vibrant city.

- Support events (entertainment, pop-up promotions, markets, new events).
- Collaborate with businesses wanting to try new events and ideas in areas and work through what's possible.

#### **Ways Council can Support Business Precincts**

- Brand and promote key precincts to protect businesses particularly the Hindmarsh Entertainment Precinct as apartment developments increase in the nearby vicinity.
- Henley Beach Precinct – review community land management plans, test ideas out (for events) in the colder months.
- Address parking pain points – infrastructure needs to happen before development, develop transport and movement strategies.
- St Clair and Woodville Railway Station – encourage parking, promote rideshares and e-bikes.
- Offer new resident packs that showcase precincts and businesses in the local area.
- Continue with Creative Cities funding and place-making strategies to promote precincts in the Council.

#### **Ways Council can support Workforce, Apprenticeships and Skills**

- Consider schools as potential business partners and community hubs.
- Promote the opportunity to share apprenticeships across two businesses.
- Work with the Western Alliance in advocating for the region and lobbying government.
- Facilitate quality of work life improvements for staff and promote business to business connections.

#### **Sector Specific Feedback**

##### **Tourism:**

- The City of Charles Sturt is leading the way with their strategy but there is an opportunity to partner or work more formally to lobby and make larger strategic actions in tourism and infrastructure.
- Events - the grants and sponsorship funding available from Council is not enough to support larger events.
- Grow and promote hotel and accommodation offerings.
- Marketing could be used to attract and persuade visitors to stay longer.
- Change perceptions and image of the City.
- Coastal opportunities – activate the surf clubs using the example of the eastern states.
- Facilitate Bowden/Brompton opportunities (e.g., providing accommodation at the Gas Works Site development).

##### **Health**

- Investigate entirely private nursing homes such as in Holland to avoid relying on government funding models.

##### **Manufacturing, Skills and Business Attraction**

- Focus on growing our manufacturing sector - multiplier effect of manufacturing jobs.
- Use low-cost skills as a way to attract manufacturing hubs.
- Work with Dept. Trade and Investment to attract their contacts to Woodville.
- Define our target growth sector(s).
- Investigate opportunities from Lot Fourteen.
- Map employment lands to attract and retain professional services.

##### **Advanced Manufacturing**

- Update actions to focus on technology and not be specific.

- Support businesses to build supply chain capability.
- Connect businesses better and facilitate co-promotion
- Communicate what's on and local business news in Western Business Leaders, sharing good business news stories is important.

**Appendix 3** has further information from the recent consultation on the draft Economic Development Strategy.

Following the engagement process and consideration of the feedback, much of which is reflected within the draft strategy, the key amendments to the Economic Development Strategy 2022-2026, are summarised in the table below. A number of further minor edits to the action plan were undertaken to provide clarity. The comments provided will help to inform and refine the implementation of the action plan going forward,

#### Summary of key amendments following consultation

Topic	EDS Section	Source	Amendment
Advanced Manufacturing	Action 2A	Round table	Expansion of focus to support the uptake of technology (broader than Industry 4.0), supply chain capability and business to business connections.
Visitor Sector	Action 2D	City of Port Adelaide Enfield	Include liaison with the South Australian Tourism Commission to grow and support the visitor sector.
Indigenous inclusion and support	Actions 3D & 3E	WACRA submission	Include support for indigenous business start-ups and entrepreneurs. - Amend action 3D to include a reference to indigenous entrepreneurs. Include support for indigenous employment outcomes - Amend action 3E to reference support for indigenous employment opportunities.

#### Next Steps

Following Council endorsement of the Economic Development Strategy 2022-26, a published version of the Economic Development Strategy will be created.

Stakeholders and members of the community who participated in the engagement process will be informed of Council's decision and where they can view the new strategy via *Your Say Charles Sturt* and other communications channels.

Implementation of the action plan will commence for new actions and continue for those that are already ongoing. Many actions and events are individually evaluated, with participants feedback creating an ongoing loop of advice and direction for future actions.

### **Financial and Resource Implications**

The implementation of the Economic Development Strategy will be resourced from existing staff resources and the recurrent budget.

Council also provides funding from its operating projects allocation towards its Business Support Grants program, Shop Local Grants and Creative Cities - Arts and Cultural Grants Programs. The total amount is \$335,000 per annum. These range of grants have been fundamental in both delivering fantastic community and economic outcomes, but also for forging strong and meaningful relationships with these important parts of our community.

Businesses contributed \$29.85 million in rates to the 2021/22 budget (\$24.7m Commercial and \$5.07m Industrial) or over 26.1% of the total rates base for Council.

### **Customer Service and Community Implications**

The Economic Development Strategy will deliver multiple positive benefits for businesses across the region. A healthy local economy with a range of job opportunities greatly encourages the creation of healthy communities and positive social impacts.

### **Environmental Implications**

Providing local job opportunities reduces the need to travel and enhances liveability.

### **Community Engagement/Consultation (including with community, Council members and staff)**

The Economic Development Strategy and Action Plan has been developed utilising the feedback that was provided from local business people and entrepreneurs as part of the Business Climate Survey 2022 and recent engagement phase. Over 185 responses were received from a diverse range of business sectors and stakeholders.

### **Risk Management/Legislative Implications**

Minimal risks have been identified with Council's ongoing role in economic development.

### **Conclusion**

The draft Economic Development Strategy and Action Plan 2022-2026 sets out our vision for the economy of the City of Charles Sturt and the strategies and actions to achieve that vision over the next four years.

**Appendices**

#	Attachment
1	Appendix 1 - Economic Development Strategy - City of Charles Sturt Economic Trends and Forecast Report - 28 March 2022
2	Appendix 2 - Economic Development Strategy 2022-26 for Council Endorsement
3	Appendix 3 - Community Engagement Summary Report Economic Development Strategy 2022-26

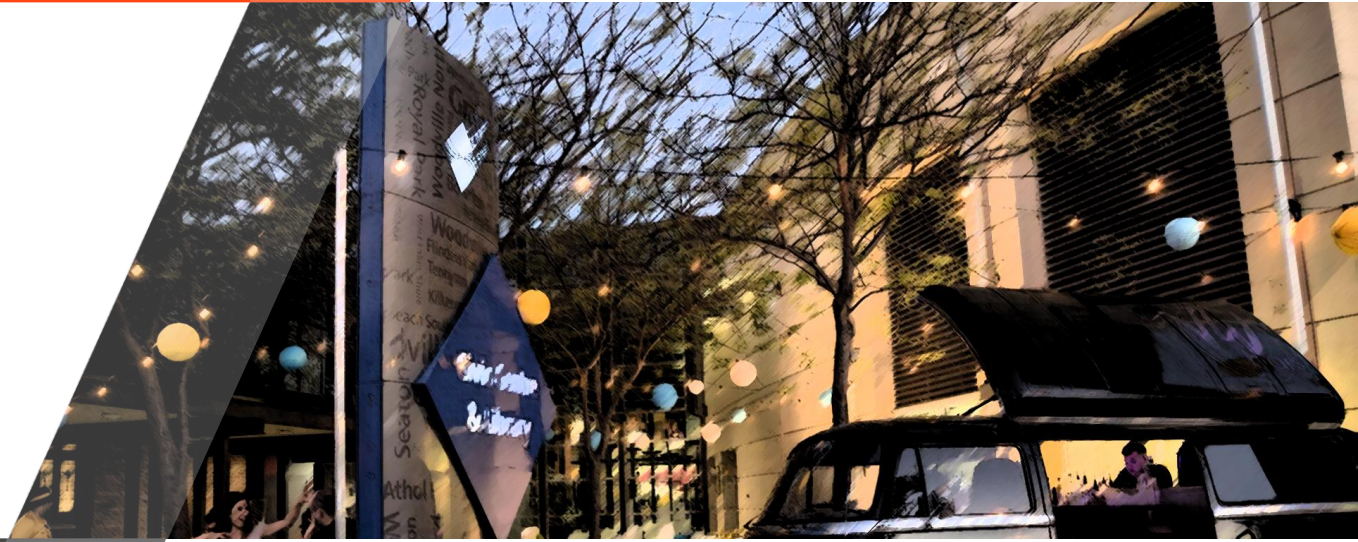
# APPENDIX 1



# City of Charles Sturt

## Economic Trends and Forecast

March 2022





## Disclaimer

This report has been prepared for Charles Sturt. .id has taken all due care in the preparation of this report.

However, .id and its associated consultants are not liable to any person or entity for any damage or loss that has occurred, or may occur, in relation to that person or entity taking or not taking action in respect of any representation, statement, opinion or advice referred to herein.

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# Data sources and definitions

- The short term economic and employment forecast of the City of Charles Sturt is developed by NIEIR. For more information on NIEIR and their methodology please refer to [the City of Charles Sturt Economic economy.id website](#).
- The following data is used in this report:
  - Australian Business Register, GST Registration (2021)
  - Australian Bureau of Statistics, Building Approvals (2021)
  - Australian Bureau of Statistics, Regional Population Growth (2021)
  - Australian Bureau of Statistics, Census of Population and Housing 2006, 2011 and 2016 estimates
  - Australian Bureau of Statistics, Weekly Payroll Jobs and Wages in Australia (2021)
  - Department of Employment, Small Area Labour Market (2021)
  - Department of Social Services, JobSeeker and Youth Allowance (2021)
  - PlanSA, Population projections for SA (2020)
  - Google Mobility (2021)
  - NIEIR (National Economics), Small area estimates of employment and economic value (2022)
  - Tourism Research Australia (2021)
- The following terms and acronyms are used in this report:
  - **ABS:** Australian Bureau of Statistics
  - **DZN:** Destination Zone (ABS Journey to Work small area geography)
  - **Greater Adelaide :** Geographic area classified as Greater Capital City Statistical Area by the ABS

- **LGA:** Local Government Area
- **LQ:** A Location Quotient is a way of seeing which are the main industries in an area, relative to a larger benchmark region. A number greater than 1 suggest the industry is over-represented locally and could be a specialisation
- **SA2:** Statistical Areas Level 2 (SA2) are medium-sized general purpose areas used by the ABS for statistical analysis purposes
- **Western Adelaide Region:** Local Government Areas including Cities of Charles Sturt, Port Adelaide Enfield, Holdfast Bay and West Torrens

• **Broad industry classification to ANZSIC2006 1-Digit classification Concordance**

Broad Industry	ANZSIC 2006 1 Digit Code Name
Business services	Information Media and Telecommunications
	Financial and Insurance Services
	Rental, Hiring and Real Estate Services
	Professional, Scientific and Technical Services
	Administrative and Support Services
Goods distribution	Wholesale Trade
	Transport, Postal and Warehousing
Goods transformation	Manufacturing
	Construction
Household services - essential	Electricity, Gas, Water and Waste Services
	Public Administration and Safety
	Education and Training
	Health Care and Social Assistance
Household services - non-essential	Retail Trade
	Accommodation and Food Services
	Arts and Recreation Services
	Other Services
Primary production	Agriculture, Forestry and Fishing
	Mining

# Executive summary

## Introduction

The City of Charles Sturt is located west of the Adelaide CBD along the coast and encompasses a diverse mix of residential, industrial and commercial activities. The City has been growing strongly, higher than the Greater Adelaide average over the last decade. However, the City is facing a range of economic challenges and opportunities and the economy has been substantially impacted by government enacted restrictions to curb the spread of COVID-19 in 2020.

This report provides a targeted economic analysis of the City of Charles Sturt economy. The report focuses on the period from 2016 to 2021 to assess recent economic performance, growth drivers and competitive advantages; assess the immediate impacts and recovery from COVID-19; the likely future economic outlook from 2021 to 2026 and the forces that will influence future growth; and concludes with long-term economic challenges and opportunities. This information can support the preparation of an Economic Development Strategy and help prioritise actions.

## Economy adversely impacted by external forces in 2019 and 2020

### Charles Sturt's economy rebounded in 2021 after low growth in 2019 and a hard fall in 2020

In 2021, the economic activity in Charles Sturt started to recover from the impacts of the weak South Australian economy in 2019 and the outbreak of COVID-19 in 2020. Over the period from 2016 to 2021, the GRP growth was 1.7% p.a., higher than the 1.3% p.a. growth from 2010 to 2015 as the economy rebounded strongly in 2021. Jobs growth was 0.3% p.a. from 2016 to 2021, significantly lower than the Greater Adelaide average (1.2% p.a.) but higher than the City's jobs growth rate from 2010 to 2015 (-0.6% p.a.).

### Large jobs fall in population services, manufacturing and transport industries

Household consumption and business investment decreased due to the slow down in the state economy and the outbreak of COVID-19. This meant the jobs decreased in population services, manufacturing and goods transport industries.

### Population growth was the main driver of economic growth

Population growth was the top contributor to economic growth over the period from 2016 to 2021. The productivity contribution to the growth decreased as productivities declined in high productivity industries. However, low jobs growth within the City meant resident workers finding jobs elsewhere, limiting the growth potential. Non-residential buildings approvals increased driven by the hospital, retail and wholesale, education and warehouses. The new buildings will provide important employment space for economic and jobs growth.

## The slowdown in economic growth highlights key challenges faced by the Charles Sturt economy

The Charles Sturt economy faces challenges in generating higher jobs growth to match its growth in population. The recent slowdown in jobs growth highlights several challenges. They are:

- **Reliance on population for job growth:** Following the decline in industrial sectors, Charles Sturt's economic performance is reliant on population which drives demand for local Health, Retail, Hospitality, service industries and residential construction activities.
- **Exposed to emerging forces:** Charles Sturt's reliance on the population to grow its economy makes it exposed to a range of forces such as the shift to online shopping (retail), government spending (health sector) and more recently COVID-19 (services).
- **Decline in specialised manufacturing industry:** The manufacturing industry still remains a major job and economic value generator in Charles Sturt. The industry is major exporting industry with potential to grow beyond the population limit. However, the industry is at risk and needs support to maintain competitiveness.
- **Large mismatch in jobs:** The low jobs growth has increased the mismatch between local jobs and resident workers' skills and qualifications. The mismatch results in a large outflow of resident workers looking for higher income and skilled jobs.

## Slow jobs recovery from the impacts of COVID-19

### Large initial job impacts as the industry mix are more exposed to COVID-19

COVID-19 had a significant initial impact on Charles Sturt's economy. The job impacts were higher than other areas in Greater Adelaide as the economy has a high share of population serving industries affected by the social distancing measures. Subsequently, a relatively higher number of businesses were at risk and supported by JobKeeper payments.

### Economic recovery driven by Construction and Health Care sectors

Strong construction pipelines, largely from the Queen Elizabeth Hospital redevelopment project, and an increase in health care jobs and economic activities are driving the economic recovery post COVID-19.

### Many jobs were lost when JobKeeper ended, but the recovery resumed quickly

Despite a strong recovery in GRP, jobs recovery were slow. Many jobs were lost when the JobKeeper scheme ended in March 2021. However, the jobs recovery resumed in the next quarter, June 2021. The industries hit hard by the initial impacts, such as hospitality and retail have staged a strong recovery but are still below pre-pandemic level as of September Quarter 2021. Residents jobs conditions have improved with a decrease in the share of JobSeeker recipients and the unemployment rate. Building approvals activity remained steady with a strong boost from TQE Hospital redevelopment project, providing a good launchpad for growth.

# Executive summary (cont)

## The outlook suggests Charles Sturt will continue to face current challenges unless interventions are made

### Jobs deficit forecast to remain

Charles Sturt job growth in the next 5 years to 2026 is forecast to be 2.4% per annum, higher than the pre COVID-19 growth rate. This growth rate is not enough to close the gap between local jobs and working residents given the strong population growth forecast in Charles Sturt.

### Forecast continued reliance on population for jobs growth

Over 86% of the jobs growth from 2021 to 2026 is forecast to be from population serving industries, Health, Hospitality, Education and Other Services.

### Retail industry is expected to decline further

Jobs in the retail industry have been significantly impacted by COVID-19. The economic outlook forecast a 9% decrease in retail jobs from 2021 to 2026.

### Increase in demand for professional occupations and higher qualifications

The forecast estimates a strong increase in professional or community/personal service occupations and the greater demand for workers with higher qualifications in the next five years.

### Need to preserve employment lands for future growth

The forecast growth in jobs will be limited if it is not matched by a comparable growth in commercial and industrial space. Particularly, commercial office space in key employment areas, developing new or enhancing existing white collar precincts (e.g. hospital), and/or protecting the appropriate industrial areas is required.

## COVID-19 will present new and accelerate long term challenges and opportunities

The future trajectory of the City of Charles Sturt's economy will be influenced by several regional, national, and global trends that drives change in the environment in which the City is located. These trends present both challenges and opportunities to the City's potential future growth. The key challenges and opportunities include:

### Challenges

- Substantial job deficit in knowledge based business service industries due to lack of jobs and larger commercial enterprises. The City lacks commercial office space to drive growth in professional and business services.
- Losing employment land due to continued redevelopment of industrial and vacant land for residential development, constraining economic growth. This will also impact existing manufacturing, wholesale and construction service operations.
- Intensifying development of employment hubs across the City have the potential to attract new businesses and/or inner metro relocations as well as tap into benefits from agglomeration spillovers.
- New technology may increase automation which places lower skilled working residents at risk of job losses.
- Low levels of digital literacy in small businesses may be negating the potential to grow sales/market beyond the City limits.
- International travel restrictions limit international visitation and reduce the potential length of stay of visitors.
- Health/aged care growth may contribute to lower productivity going forward unless higher value services are focused on.

### Opportunities

- A strong non-residential building pipeline will support economic activity over the coming years.
- Population ageing and new health and aged care facilities (e.g. TQEH redevelopment) will help further growth in the Healthcare industry.
- Continued revitalisation projects such as ToD in Bowden will hopefully attract commercial investment from white collar industry areas and diversify the economy.
- An increase in remote working for white collar office based employees may keep skilled residents in the City supporting local retail and providing incentives for new coworking facilities.
- New technology such as AI and 5G connected systems have the potential to substantially grow the value of advanced manufacturing, defence and construction related areas, as well as generate new opportunities.
- Australia is increasingly shopping online and supporting growth in Charles Sturt's specialised wholesale trade industry.



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Challenges and opportunities for the City of Charles Sturt going forward

# 01 How is the economy performing?

## Charles Sturt economy in 2020/21

### The economy is recovering from the slowdown in the state economy in 2019 and the outbreak of COVID-19 in 2020

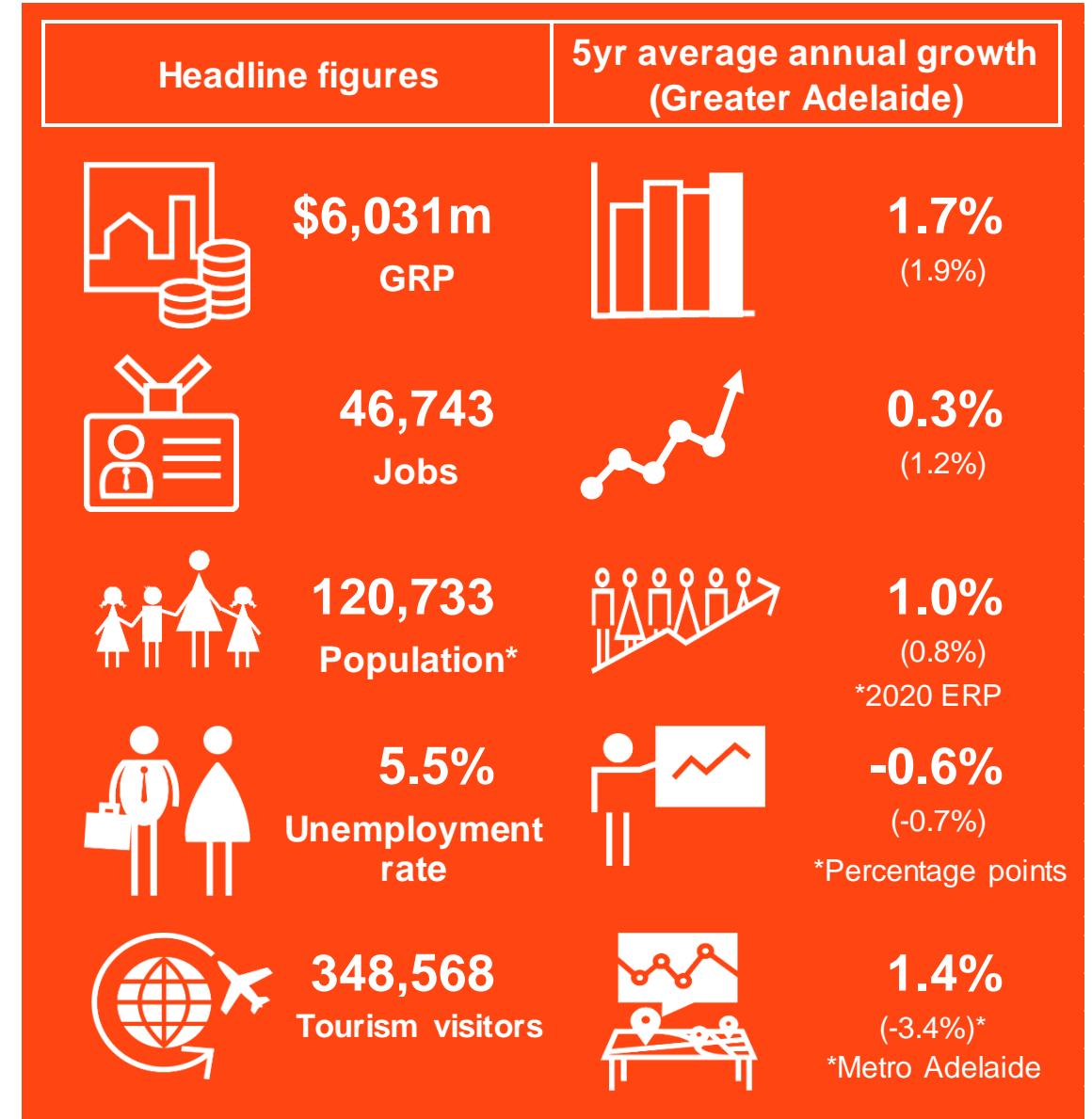
Charles Sturt generated \$6,031m in GRP and supported an estimated 46,743 jobs in 2020/21. This represents 6.5% of Greater Adelaide's economy in terms of GRP (6.8% in terms of local jobs).

The economy in terms of GRP has been expanding over the last 5 year with annual average GRP growth rate of 1.7%. The number of local jobs increased at an average of 0.3% per annum during the same period.

Population wise Charles Sturt represents 8.8% of Greater Adelaide's total population. Population increased by 1.0% per year between 2016 and 2020, above the Greater Adelaide average.

The unemployment rate was 5.5% as at June 2021, relatively lower than Greater Adelaide (6.7%). It has decreased by -0.6% points in the last 5 years.

Tourism visitation grew by 1.4% per year between 2016 and 2021, well above the Greater Adelaide average of -3.4% per year.





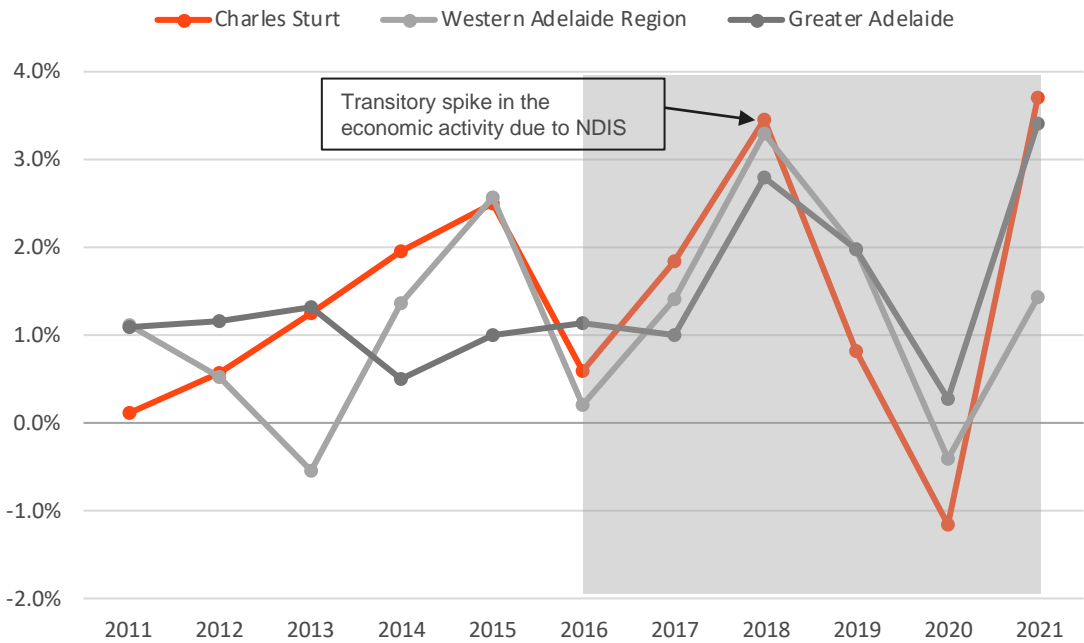
# GRP growth has trended down prior to COVID-19, but recovered strongly in 2021

Over the decade to 2021, Charles Sturt GRP grew at 1.5% per annum, the same as the Greater Adelaide average (1.5% per annum). Recent growth has been even higher driven by the strong increase in 2020/21 of 3.7%. In the last 5 years, the region's GRP has increased by 1.7% per annum.

Compared to Metro LGAs, Charles Sturt GRP growth over the period from 2016 to 2021 (1.7% per annum) has been lower, the average annual GRP growth rate of surrounding Metro LGAs during the same period was 1.9% per annum.

## Growth in GRP - Charles Sturt

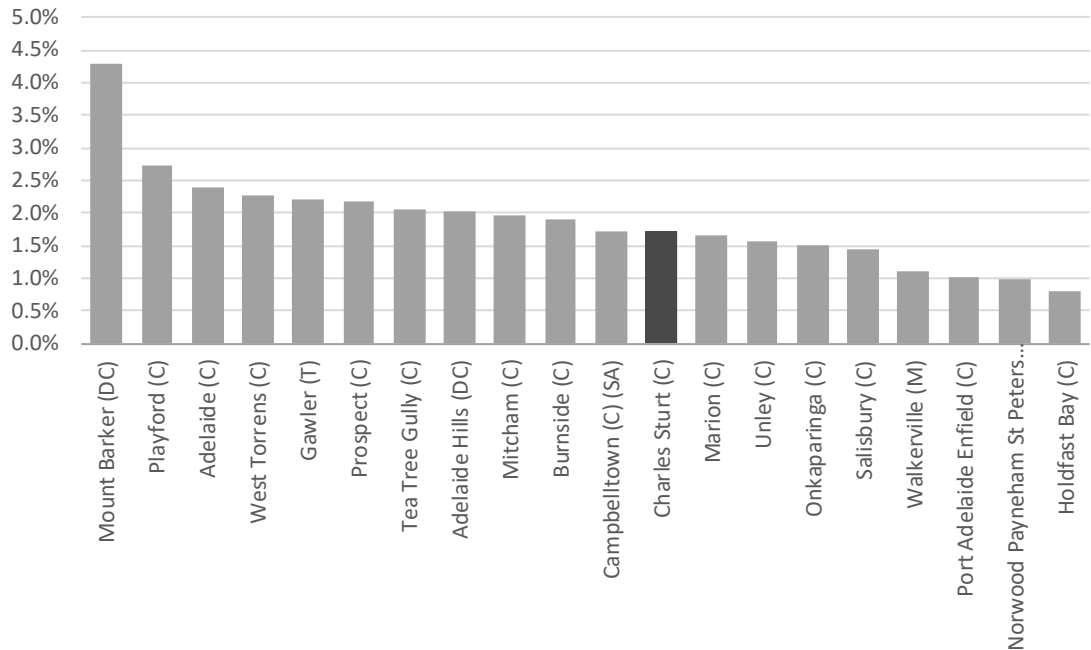
% per annum



Source: NIEIR, 2022

## Growth in GRP - Metro LGAs, 2016 to 2021

% average annual growth rate



Source: NIEIR, 2022

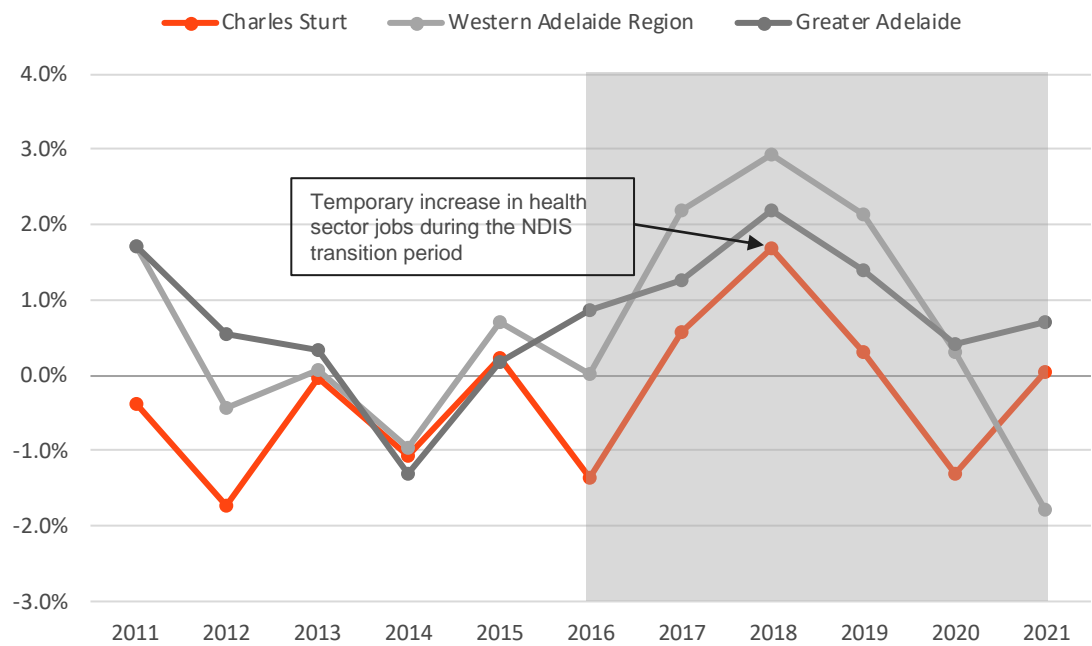
# Jobs condition improved, but remains weak and lower than the metro average

From 2011 to 2021, Charles Sturt local jobs decreased by -0.3% per annum, below the Greater Adelaide average growth rate of 0.7% per annum. In the last 5 years, Charles Sturt local jobs growth has been higher compared to the period from 2011 to 2021. From 2016 to 2021, local jobs has increased by 0.3% per annum despite the drop in 2019/20.

The Charles Sturt local jobs growth under performed compared to surrounding Metro LGAs, where over the period from 2016 to 2021, the average local jobs growth rate was 1.2% per annum.

## Growth in Local Jobs - Charles Sturt

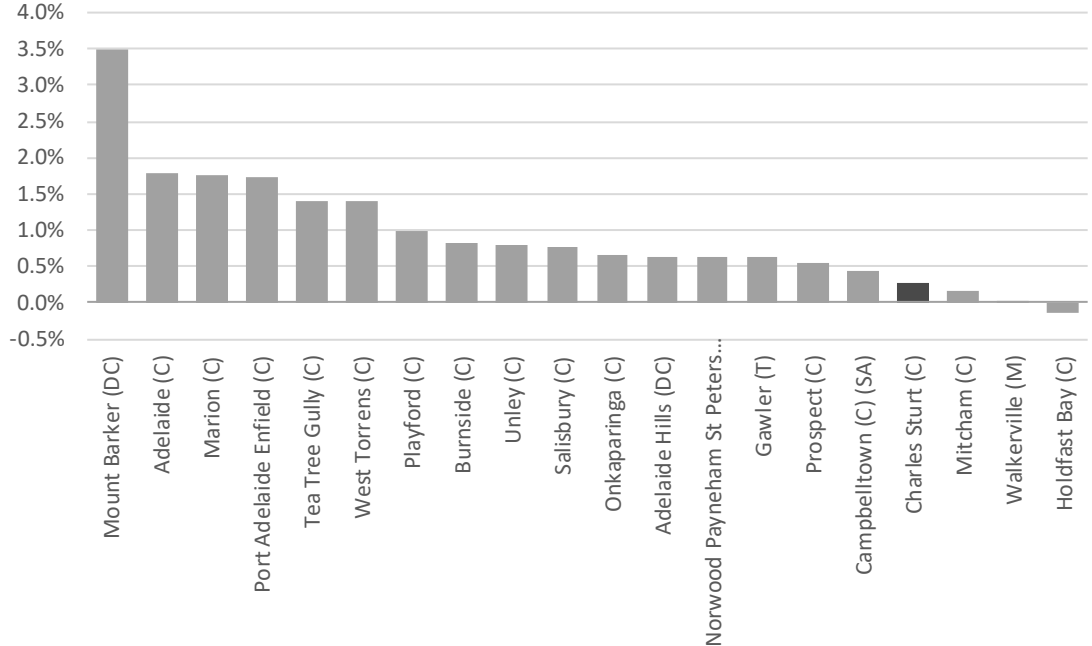
% per annum



Source: NIEIR, 2022

## Growth in local jobs - Metro LGAs, 2016 to 2021

% average annual growth rate



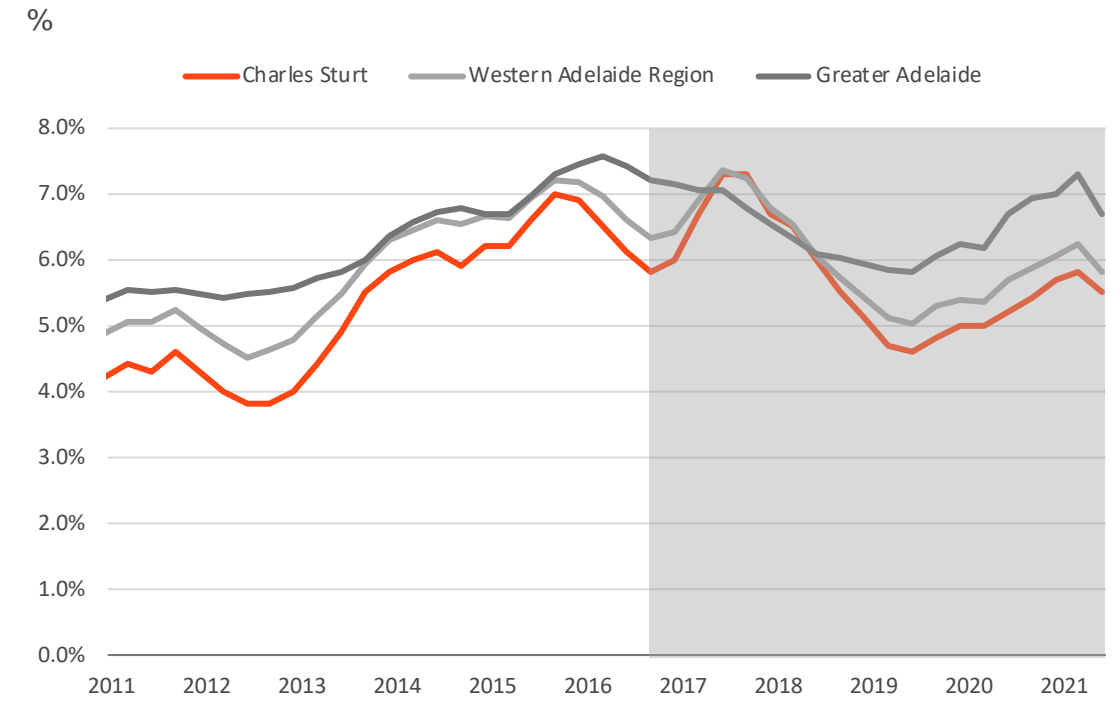
Source: NIEIR, 2022

# Unemployment rate has dropped below the metro average. But residents left the labour market as jobs condition worsens in the second half of 2019.

Over the last ten years to June-2021, the unemployment rate in Charles Sturt averaged at 5.5%, below the Greater Adelaide average (6.3%). Since peaking in 2017, the unemployment rate has been trending down. The unemployment rate in Charles Sturt reached a low of 4.6% in June-2019. However, the recent slowdown in the state economy and the impacts from COVID-19 has increased unemployment. By June-2021 the unemployment rate increased back to 5.5%.

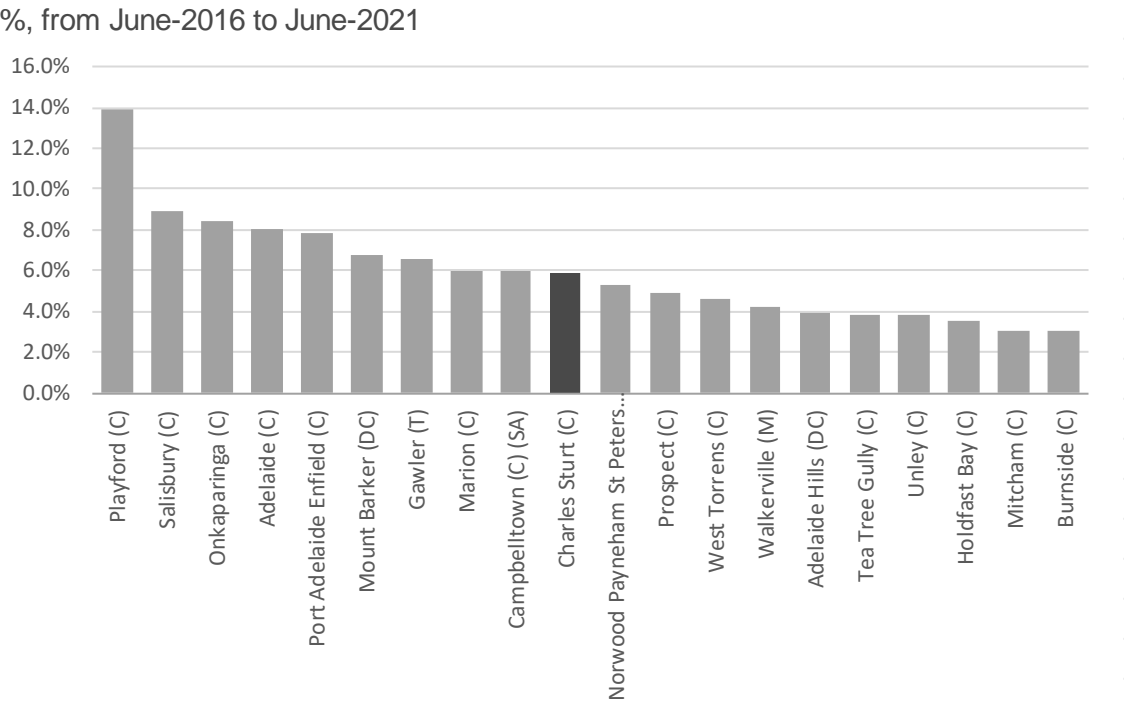
Compared to surrounding Metro LGAs, the Charles Sturt average unemployment rate over the last 5 years to June-2021 (5.9%) was similar to the surrounding Metro LGA average unemployment rate during the same period (5.9%).

## Unemployment rate - Charles Sturt



Source: ABS Labour force survey (2022); Department of Employment SALM (2022)

## Average unemployment rate - Metro LGAs



Source: ABS Labour force survey (2022); Department of Employment SALM (2022)

# 02 What is driving recent economic conditions?

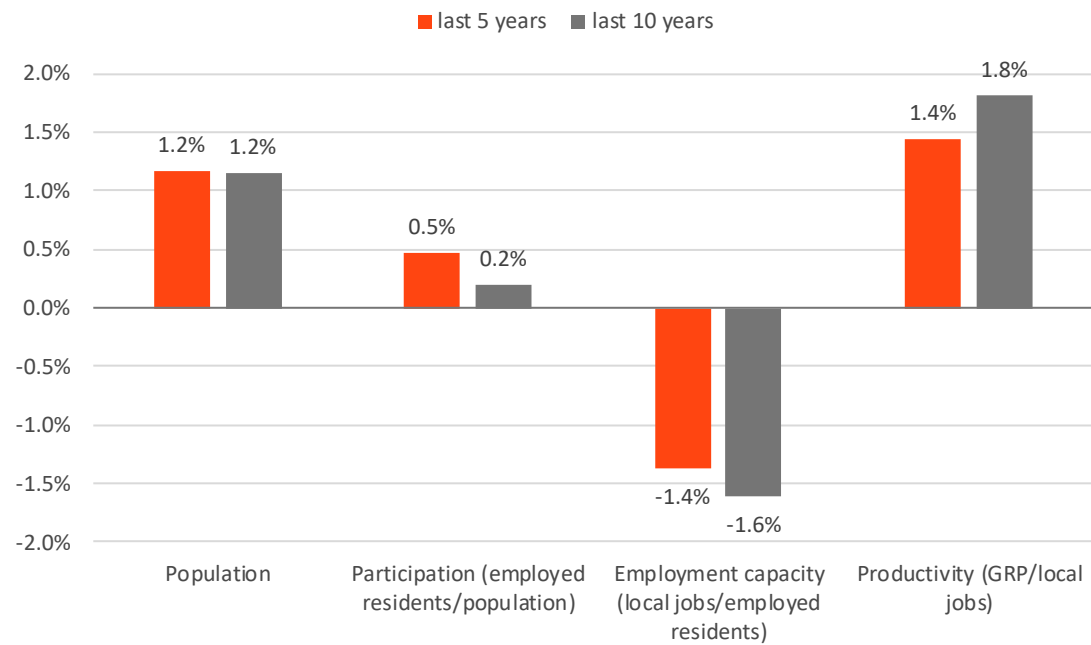
# Growth was driven by population and productivity increase. But the outflow of labour limits the growth potential.

Over the last 5 years to 2021, the main contributor to economic growth in the Charles Sturt was change in productivity which averaged 1.4% per annum. This figure was above average figure for the period from 2011 to 2021

During the same period, the main detractor from growth was employment capacity which averaged -1.4% per annum.

## Components of growth - Charles Sturt

Annual average growth %

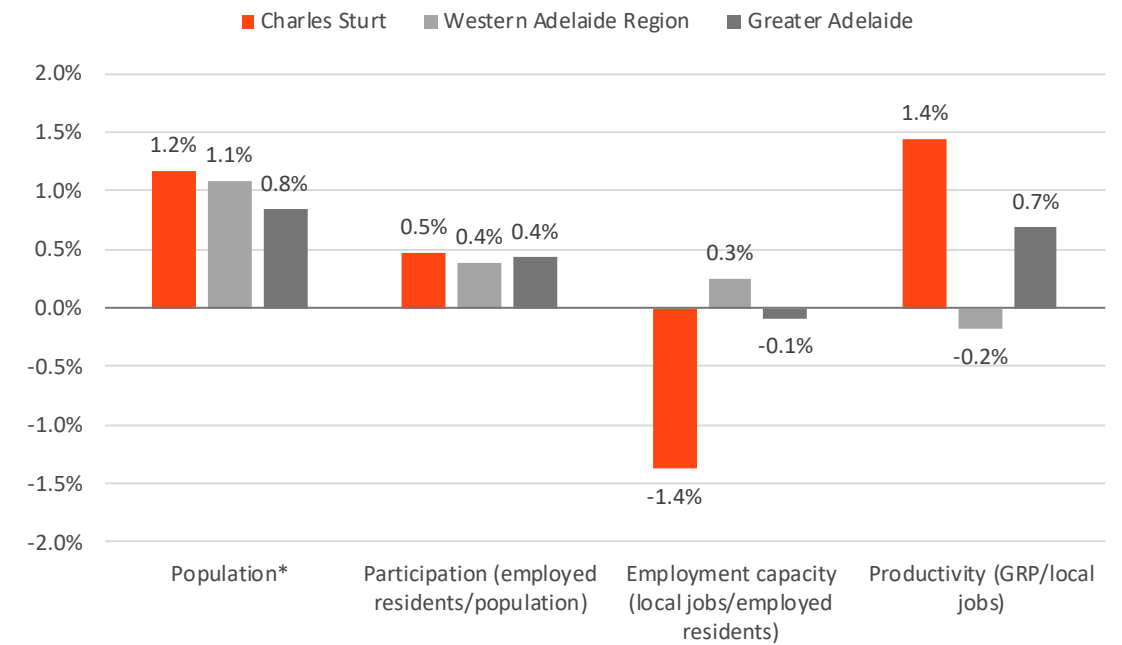


Source: NIEIR, 2022

Compared to the Greater Adelaide, Charles Sturt had higher components of growth in population, participation, productivity, and lower components of growth in employment capacity, during the period from 2016 to 2021.

## Components of growth - Charles Sturt, last 5 years

Annual average growth %



Source: NIEIR, 2022 | Based on estimated 2021 population

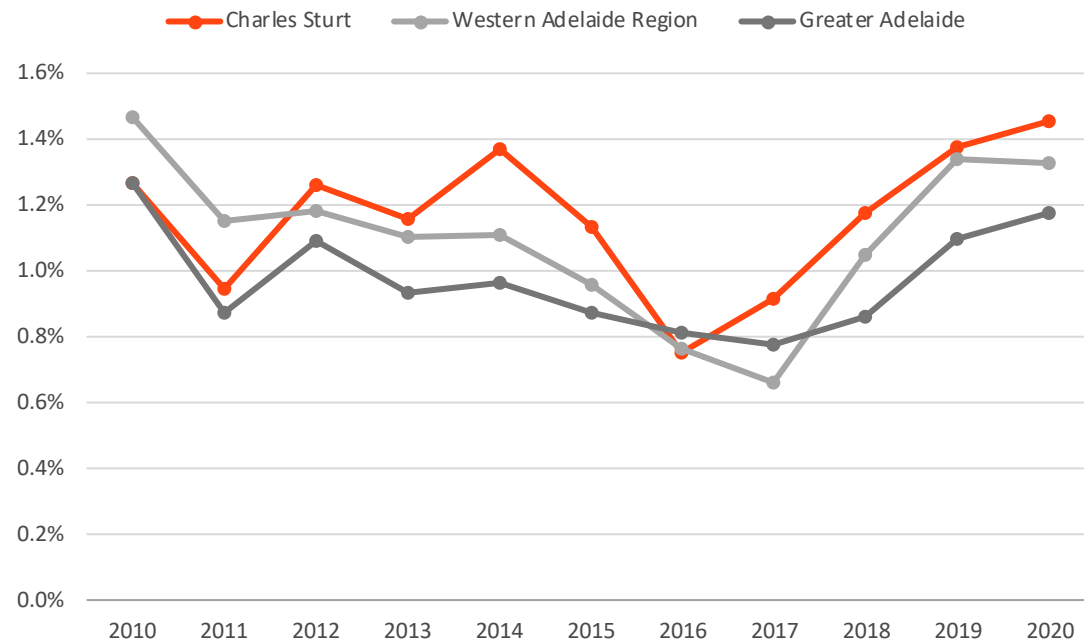
# International migration driving population growth

Over the decade to 2020, Charles Sturt's population growth has been above the Greater Adelaide average.

The main contributor to population growth in the last year was net overseas migration (people arriving from overseas minus those leaving). An estimated 4,662 net new residents came from this component between 2016 and 2020.

## Recent population growth - Charles Sturt

Annual Change in ERP %

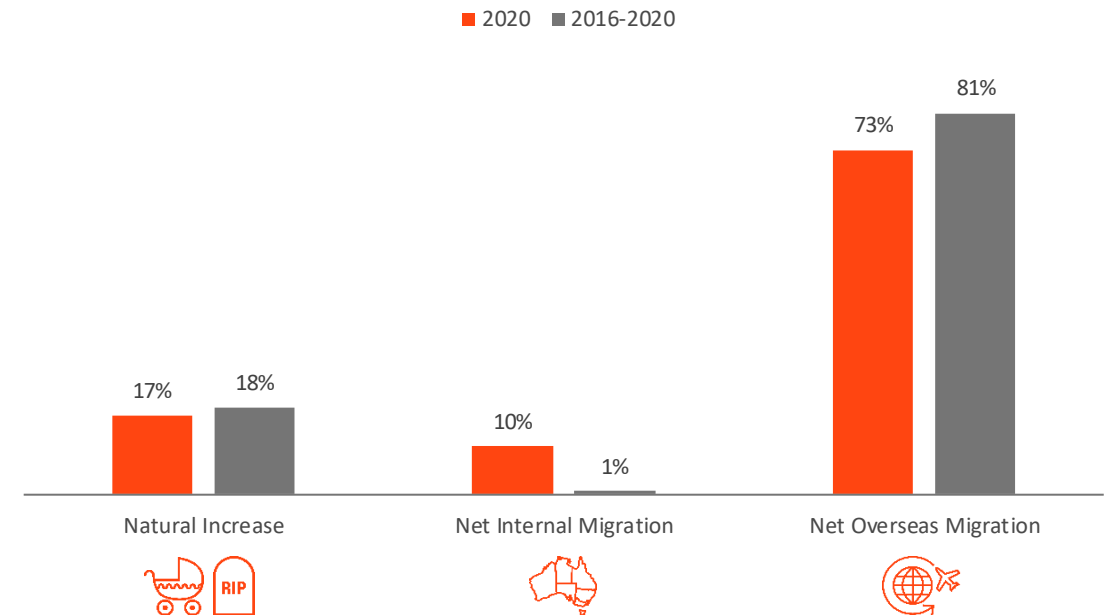


Source: ABS, 2021, Cat: 3218.0 - Regional Population Growth, Australia, 2019-20

The lowest contributor to growth was net internal migration (people moving in minus those moving out of the LGA within Australia). The component's contribution to population growth was 10% in 2020, significantly higher than the average between 2016 and 2020. The other factor influencing population growth was natural increase (births minus deaths) and its impact was positive.

## Population growth components 2016-2020 - Charles Sturt

Change in component as a % of total change in population in the year to June



Source: ABS, 2021, Cat: 3218.0 - Regional Population Growth, Australia, 2019-20

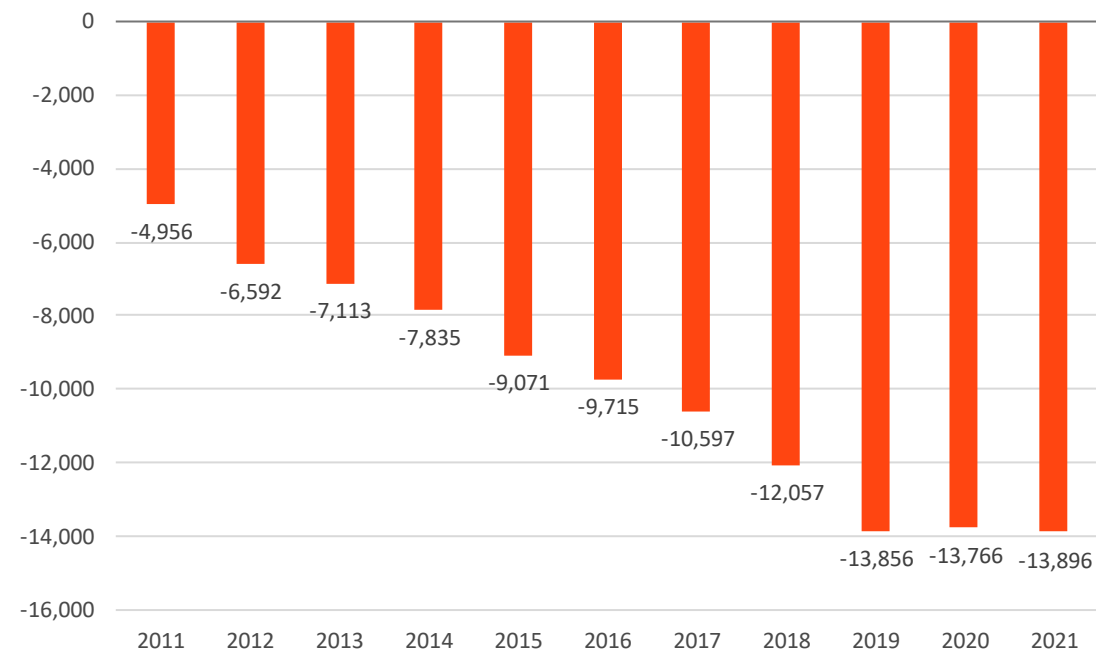
# Employed residents are increasingly working in areas beyond Charles Sturt as jobs growth is not keeping up with population growth

In 2021, there were 13,896 less jobs than employed residents. This suggests the region is not generating enough jobs to support its residence base, or neighbouring regions provide better opportunities.

This jobs 'deficit', difference between jobs and residents, has grown by 8,940 over the last ten years.

## Employment capacity - Charles Sturt

Difference between local jobs and employed residents

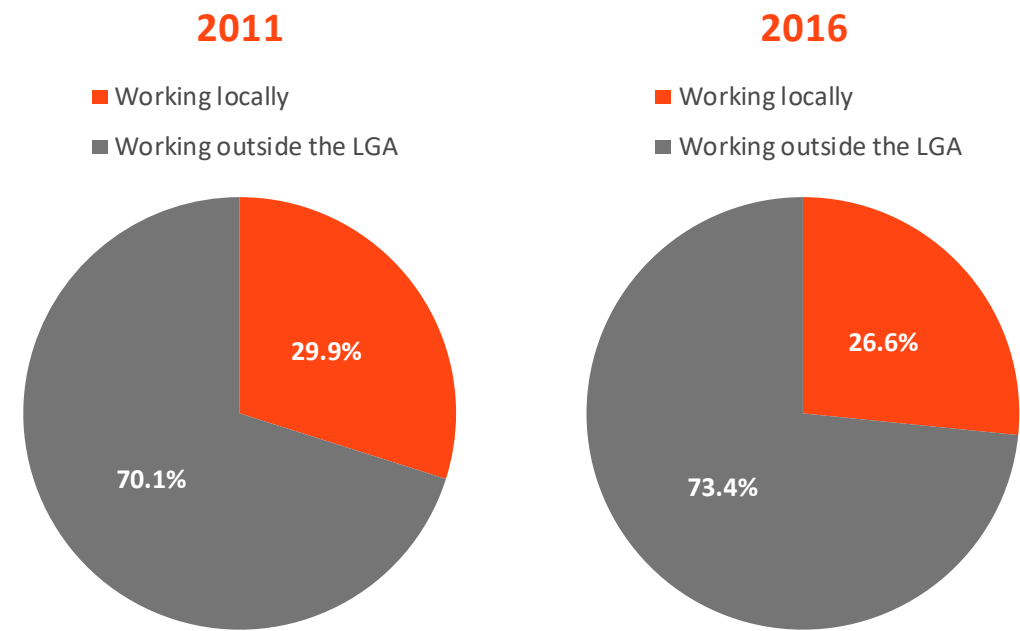


Source: NIEIR, 2022

The share of residents working outside the LGA increased between 2011 and 2016. This suggests more residents are looking elsewhere for opportunities possibly because local jobs are not matching their needs.

## Employment self containment - Charles Sturt

Share of residents working locally



Source: ABS Census of Population and Housing, 2011 and 2016

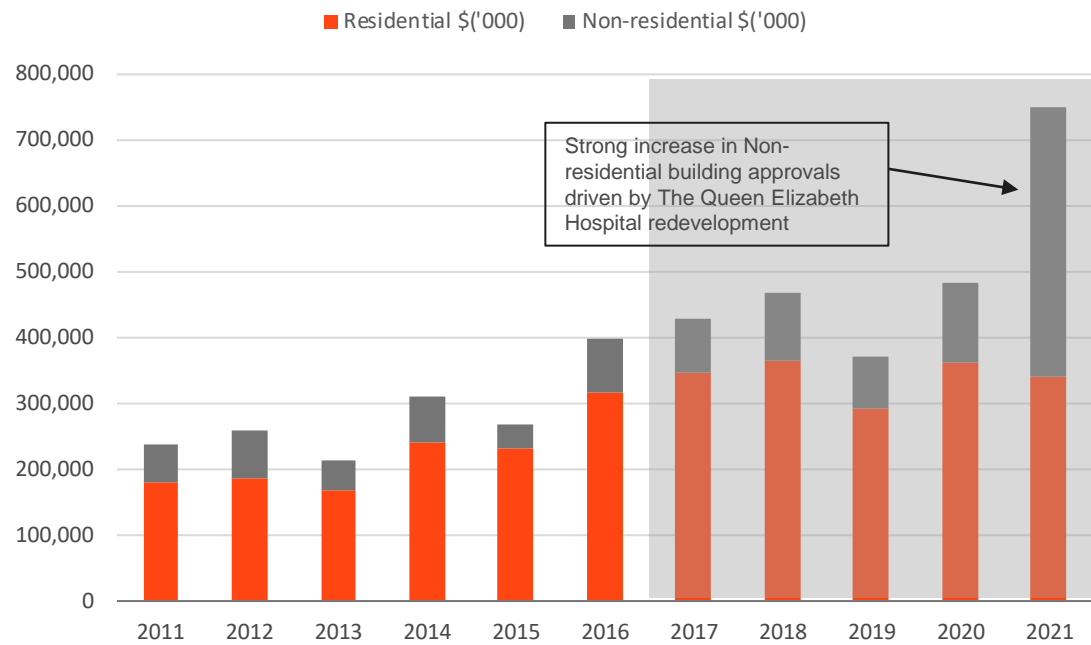
# Strong growth in building approvals since 2016. Growth in Non-residential building approvals will provide construction jobs and employment land for future jobs growth.

The average value of non-residential building approvals over the last five financial years (\$158M) has been above the decade long average (\$109M). In this recent period, the total value of residential building approvals (\$1,706M) has outweighed total non-residential building approvals (\$791M).

The leading driver of non-residential building approvals value in the last five years has been Health buildings, followed by Retail and wholesale trade buildings and Education buildings.

## Building approvals - Charles Sturt

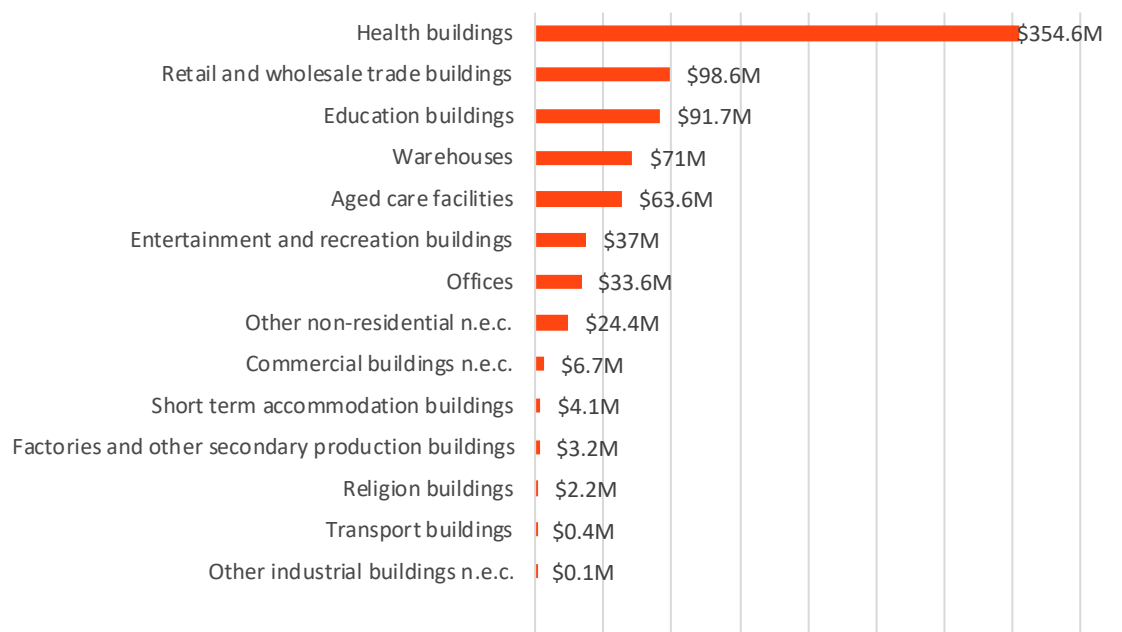
Annual value approved



Source: ABS, 2022, Cat: 8731.0 - Building Approvals, Australia

## Non-residential approvals - Charles Sturt, last 5 years

Annual value approved by type, Jun-2016 to Jun-2021



Source: ABS, 2022, Cat: 8731.0 - Building Approvals, Australia



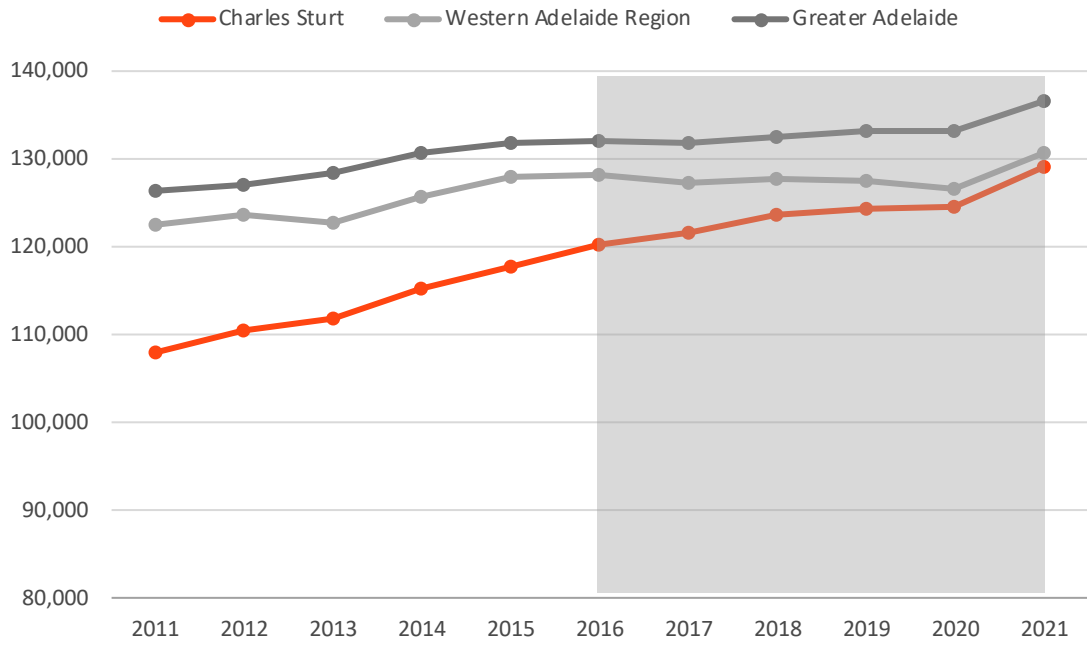
# Productivity growth slowed from 2016 to 2020 after a period of strong growth. The productivity bounced up in 2021 driven by a spike in construction activities in South Australia.

Charles Sturt's average worker productivity has increased strongly over the decade to 2020/21. However, the average worker productivity in 2020/21 was around \$7,606 per worker less than the Greater Adelaide average. This difference has decreased over the decade.

Charles Sturt's productivity is lower than the Greater Adelaide average as the City has less share of high productivity white collar industries, such as Finance, Public Administration and Professional services.

## Worker productivity - Charles Sturt

\$ GRP per worker



Source: NIEIR, 2022

The industries that have the largest productivity per job is Utility, followed by Financial and Insurance Services and Agriculture, Forestry and Fishing.

## Job change by productivity - Charles Sturt

	Productivity, 2021 (\$ value added per job)	Change in share of total jobs, 2016 - 2021
Electricity, Gas, Water and Waste Services	\$387,137	0.0%
Financial and Insurance Services	\$374,898	0.0%
Agriculture, Forestry and Fishing	\$236,790	-0.1%
Mining	\$219,620	0.0%
Rental, Hiring and Real Estate Services	\$216,792	0.2%
Wholesale Trade	\$206,404	1.0%
Information Media and Telecommunications	\$196,663	0.0%
Administrative and Support Services	\$100,702	0.0%
Professional, Scientific and Technical Services	\$99,997	0.7%
Health Care and Social Assistance	\$96,119	1.0%
Manufacturing	\$95,928	-1.3%
Construction	\$92,428	1.5%
Transport, Postal and Warehousing	\$90,009	-0.7%
Public Administration and Safety	\$89,106	0.0%
Tourism and Hospitality *	\$80,962	-0.4%
Education and Training	\$77,309	0.3%
Retail Trade	\$65,350	-1.5%
Other Services	\$62,080	0.1%
Arts and Recreation Services	\$50,825	-0.4%
Accommodation and Food Services	\$48,440	-0.8%

Source: NIEIR, 2022 | \* Includes activities from other industries

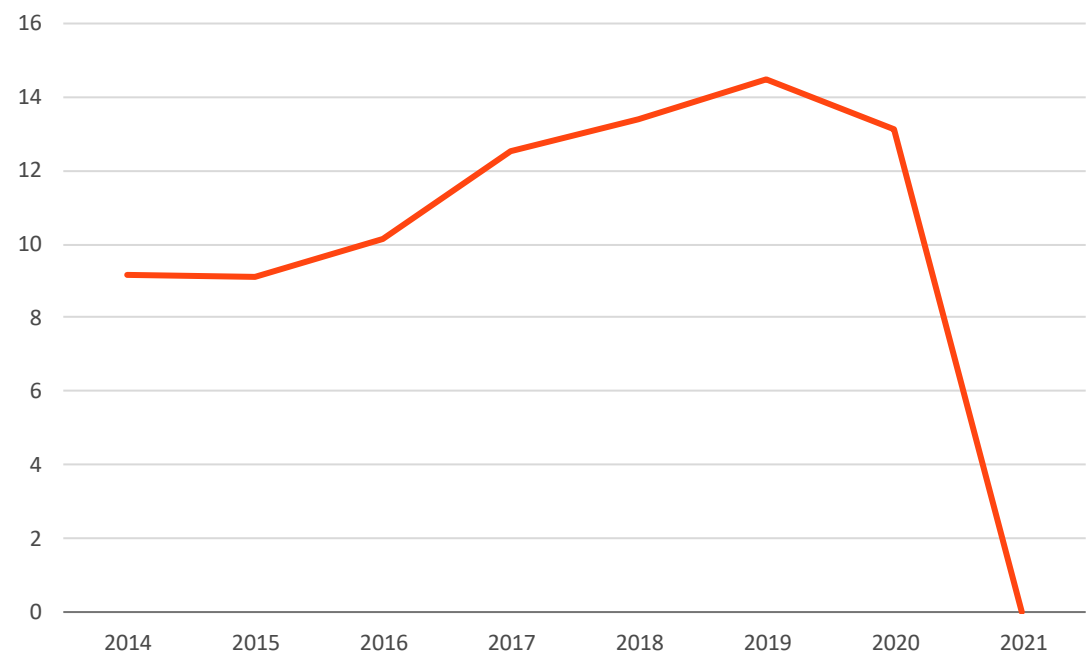
# Domestic and international visitation is trending up. Visiting friends and relatives in Charles Sturt main reason for the visit.

Pre COVID-19 international visitors growth in Charles Sturt averaged at 6.1% per annum from 2014 to 2020. The growth in international visitors was higher than the Greater Adelaide average of 1.5%.

During the same period, domestic overnight visitors grew at 2.8% per annum while domestic daytrip visitors grew at 3.1% per annum. COVID-19 had a negative impact on domestic visitation. In 2020/21, the domestic overnight visitors decreased by 12% while the daytrip visitors decreased by 6%.

## International visitors - Charles Sturt

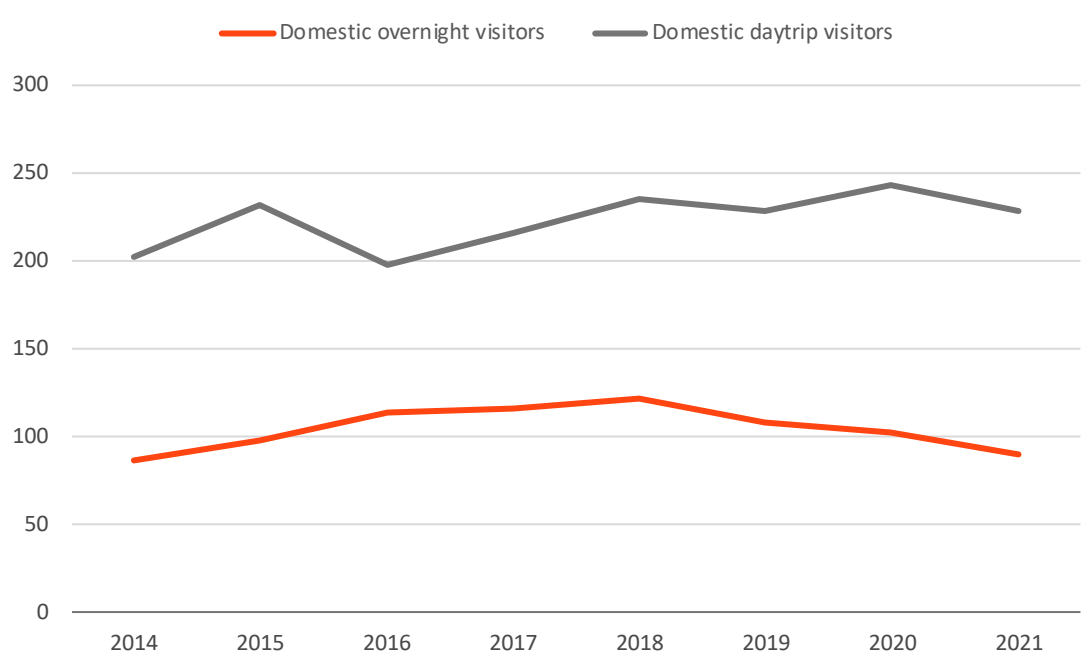
,000s (3 year rolling average excl. 2021)



Source: Tourism Research Australia, 2022

## Domestic visitors - Charles Sturt

,000s (3 year rolling average)



Source: Tourism Research Australia, 2022

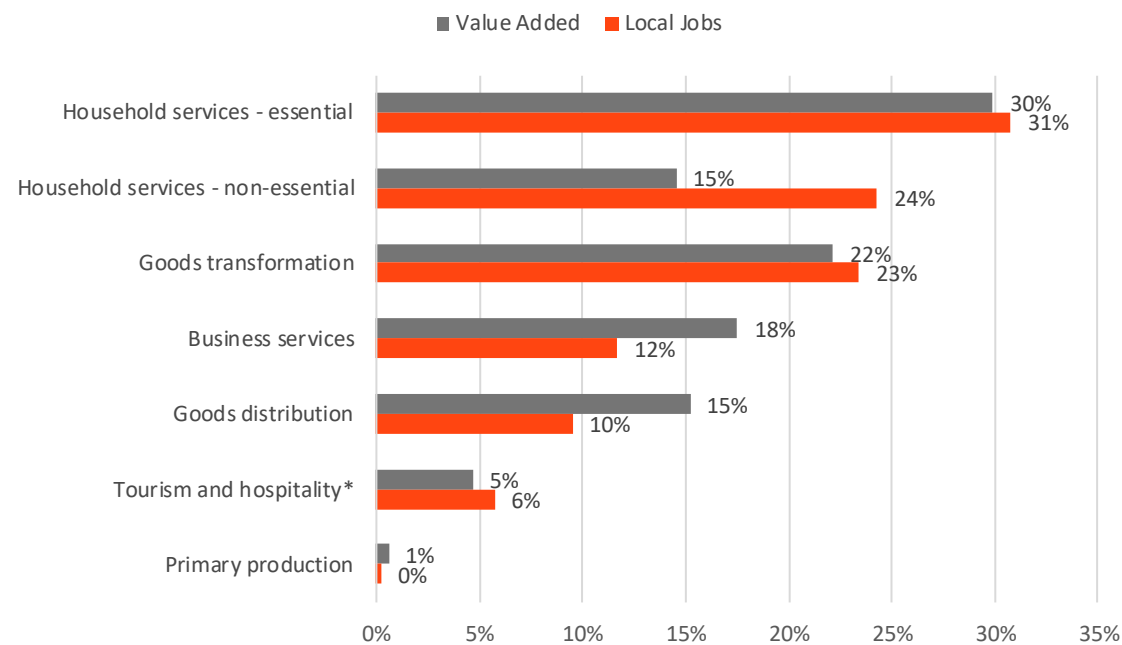
# 03 Which industries are driving recent growth?

# Economy is dominated by Household Service industries. However, Manufacturing and Construction also make an important contribution.

Charles Sturt's economy leans towards population servicing sectors, supporting over 50% of all jobs in 2021. Most value is generated in industries related to essential household services and the secondary transformation of goods.

## Industry profile - Charles Sturt

% of total, 2021



Source: NIEIR, 2022 | \* Includes activities from other industries

The industries that were the top for jobs and productivity included: Health Care and Social Assistance, Manufacturing, Retail Trade, Construction, Wholesale Trade.

Top economic values producing industries included three goods related industries: Construction, Wholesale Trade and Manufacturing.

## Top 4 Industries in 2021



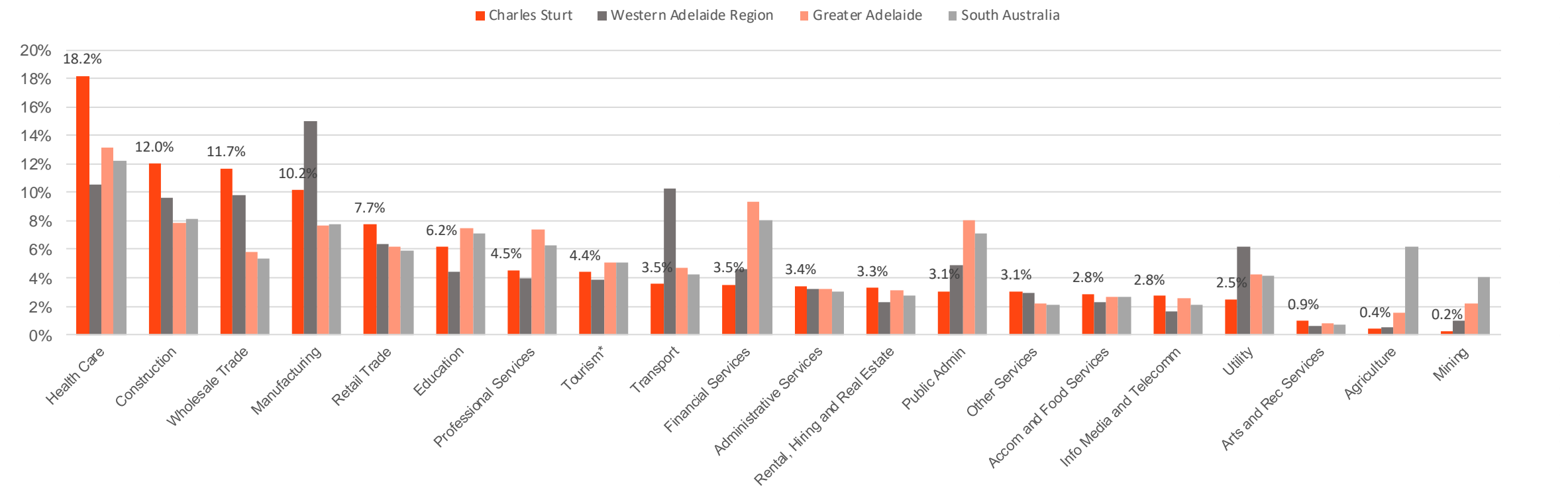
Source: NIEIR, 2022 | \* % of local jobs in Charles Sturt; \*\* % of value added in Charles Sturt

# High share of economic value generated by health, construction, wholesale and manufacturing sectors compared to the metro and state averages. White collar industries are under-represented.

The health care sector generated almost one fifth of all economic value in Charles Sturt, significantly higher than other benchmark areas. The construction, wholesale and manufacturing sectors generated over 10% of the City's total economic value, well above the metro averages. White collar industries, such as Public admin, Finance, Professional and business services, were significantly lower than the Greater Adelaide average.

## Share of value added by industry sector

% of total, 2021



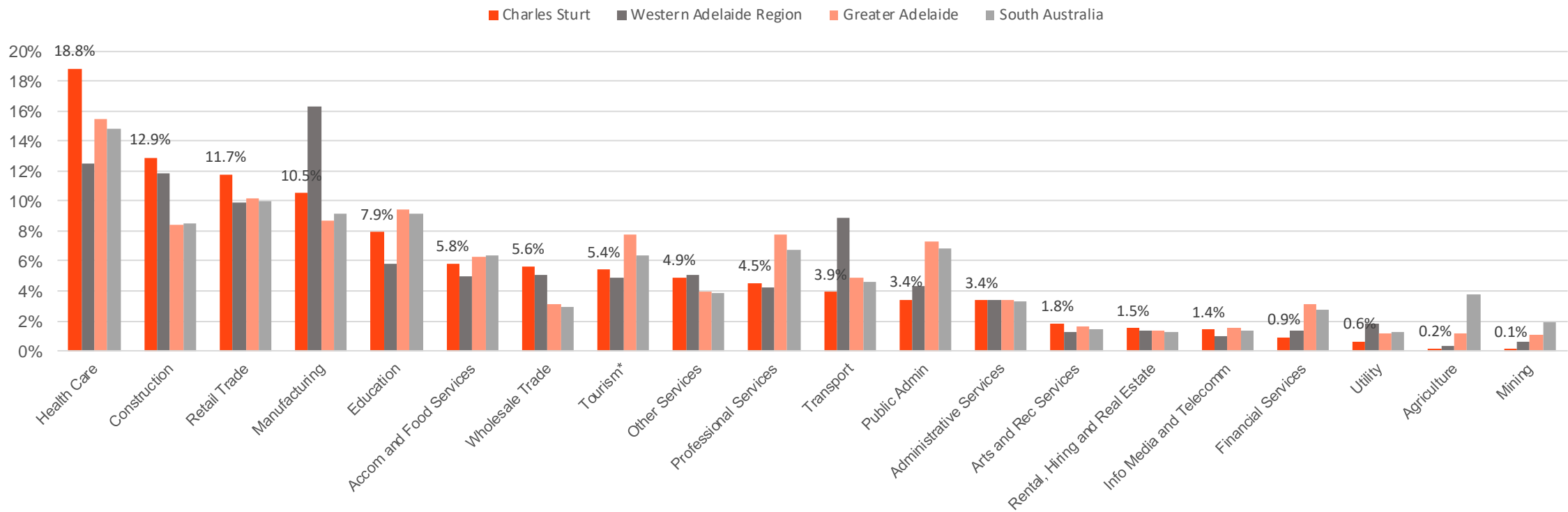
Source: NIEIR, 2022 | \* Includes activities from other industries; Preliminary Value

# Population serving industries dominate jobs in Charles Sturt but are underweight on public administration and business service jobs

High share jobs in population serving sectors, such as health, construction, retail and education. With 10.5% of total jobs, the manufacturing sector supported a significant share of jobs in the City. Jobs in high value generating Finance, Public Administration and Professional services was significantly below the Greater Adelaide and the state averages.

## Share of total jobs by industry sector

% of total, 2021



Source: NIEIR, 2022 | \* Includes activities from other industries; Preliminary Value

# Large jobs fall in Retail, Hospitality, Manufacturing and Transport industries due to slow down in the state's economy from 2019 and the outbreak of COVID-19

Over the last 5 years, the major drivers of productivity and job growth included: Construction, Health Care and Social Assistance, Wholesale Trade, Professional, Scientific and Technical Services, Education and Training.

Over the last 5 years, the main detractors of productivity and job growth included: Agriculture, Forestry and Fishing, Tourism and Hospitality, Arts and Recreation Services, Transport, Postal and Warehousing, Accommodation and Food Services.

## Industry performance - Charles Sturt

Last 5 years (2016-2021)

	Jobs	Value Added \$m
Retail Trade	-606	-6
Manufacturing	-544	-84
Accommodation and Food Services	-338	-17
Transport, Postal and Warehousing	-293	-155
Arts and Recreation Services	-180	-8
Tourism and Hospitality *	-166	-25
Agriculture, Forestry and Fishing	-49	-7
Information Media and Telecommunications	-13	29
Electricity, Gas, Water and Waste Services	-3	37
Mining	1	2
Financial and Insurance Services	19	6
Administrative and Support Services	33	-6
Public Administration and Safety	37	12
Other Services	82	-10
Rental, Hiring and Real Estate Services	92	39
Education and Training	184	19
Professional, Scientific and Technical Services	349	41
Wholesale Trade	477	145
Health Care and Social Assistance	580	198
Construction	775	81

Source: NIEIR, 2022 | \* Includes activities from other industries; preliminary value

## The good news

- **Construction** activity level increased significantly in 2021 following the commencement of the Queen Elizabeth Hospital redevelopment project. Building and housing construction jobs increased as residential building activities remained stable. Strong building activity in 2019/20 and 2020/21 will support construction jobs in the immediate term.
- **Health Care and Social Assistance** value added increased significantly driven by the hospital and residential services. The relative increase in jobs was lower than value added growth as the social-distancing restrictions during the COVID-19 period decreased non-essential health services (e.g. dental, child, aged, disabilities care, welfare and counselling services).
- **Wholesale Trade** employment increased significantly in the last five years to 2021. The growth in precincts, such as ISPT Industrial Estate is positive for the industry.
- After a period of moderate growth, **Professional Service** employment has increased significantly over the last five years. This is in line with strong growth in Management Advice and Consulting Service businesses during the same period. The future growth in professional services needs growth in commercial, mixed use and business parks in the City.

## The bad news

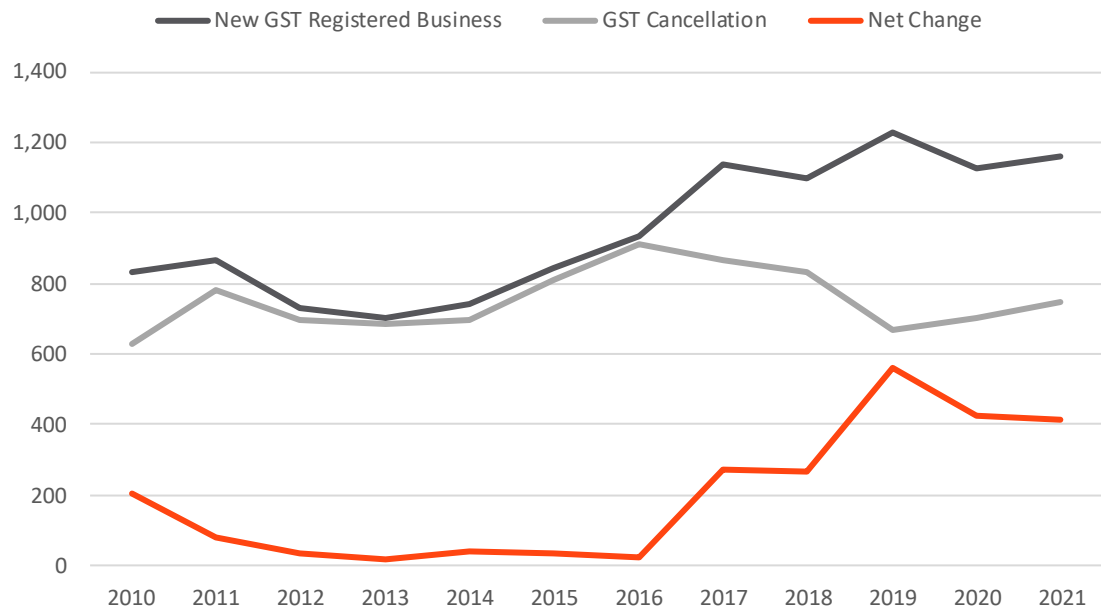
- **Retail trade, Accommodation and Food Services** and **Tourism** employment decreased significantly due to the outbreak of COVID-19. However, the **Retail trade** industry was already experiencing a decline since September Quarter 2019. By March Quarter 2020, employment in the industry was already down by 127 jobs compared to March Quarter 2019.
- **Manufacturing** employment decreased from 2016 to 2021 driven by the fall in the food product manufacturing sector jobs since the outbreak of COVID-19.
- After peaking in 2018, **Transport, Postal and Warehousing** industry declined as the slowdown in the state's economy decreased the logistics demand.
- Jobs in **Arts and Recreation Services** sector decreased significantly from 2016 to 2021, driven by a significant fall in the Sports and Recreation Activities industry.

# Net new businesses increasing again after a period of no growth

The net increase in businesses were almost zero in Charles Sturt over the 5 year period from 2011 to 2016. From 2016, the net increase has started trending up driven by favourable economic and jobs conditions in the City and Greater Adelaide. The gap between new business GST registrations and GST cancellations widened from 2016 to 2019. From 2016 to 2021, the annual average increase was 327 businesses. This increase was over 160% of the annual average over the decade to 2021 (197 businesses).

## Business entries and exits - Charles Sturt

Number of businesses

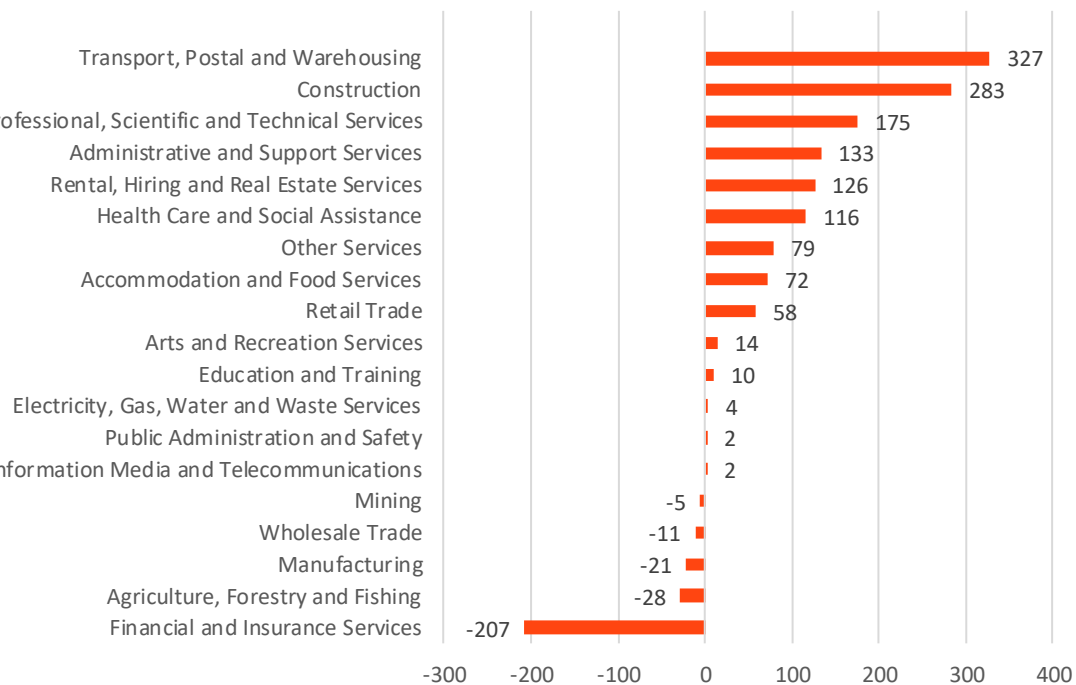


Source: Australian Business Register, 2022

Professional, Scientific and Technical Service businesses increased significantly in line with a strong jobs increase in the industry in the last two years. However, the increase in Transport businesses is contrary to the job decrease in the industry as the increase was driven by taxis and Uber driver/delivery businesses. The construction business increase was driven by house construction businesses during the same period. Almost all of the new businesses in these industries were from non-employed businesses.

## Net change in GST registered businesses - Charles Sturt

From 2019 to 2021



Source: ABS Business Entries and Exits, 2022



# 04 What happened during the COVID pandemic shock?

# Impacts from COVID-19

In March 2020, the Commonwealth and State Governments launched unprecedented public-health and economic responses to combat the growing pandemic threat.

Along with international passenger and trade restrictions, social distancing measures implemented towards the end of March had the greatest impact on employment and economic growth outcomes going forward.

Social distancing and 'isolation' was introduced to reduce the infection rate, slow deaths and ensure hospitals maintain sufficient ICU bed capacity to deal with COVID-19 cases as well as normal emergency medical demand. The alternative option of limited social restrictions ran the risk of potentially overrunning ICU units leading to thousands of deaths (as experienced in some countries overseas) and the need for an even larger 'lock down' at a later stage.

The largest negative impacts for the State and National economies occurred in the second quarter of 2020 (final quarter 2019/20 FY) as rigid social distancing measures were maintained for months.

Following this, falling infections lead to eased restrictions but waves of infections forced the reintroduction of stricter measures. However, economic activity was less severely impacted because the measures became more effective in containing the virus relative to the cost to economic activity.

However, it should be noted that actual results are entirely uncertain, given the fact there is no historical event comparable with what is currently occurring.

## Economic policy responses

A number of responses were enacted by government to address the likely negative impacts of the social distancing policies.

- RBA – reduced interest rates (official and quantitative easing) and demand side
- Wage subsidy – boost cash flow for businesses
- Increases in working age and non-working age social security benefits
- Loan guarantee for small and medium businesses.
- Jobkeeper payment scheme – businesses effectively playing a centrelink role. But fine print impacted effectiveness – e.g. Australian citizen and casual employee >12 months
- Childcare payments

The majority of these measures, especially stimulus spending, helped address worker incomes but had limited impact on Gross Product due to the fact that most employees were at home and effectively not producing goods and services.

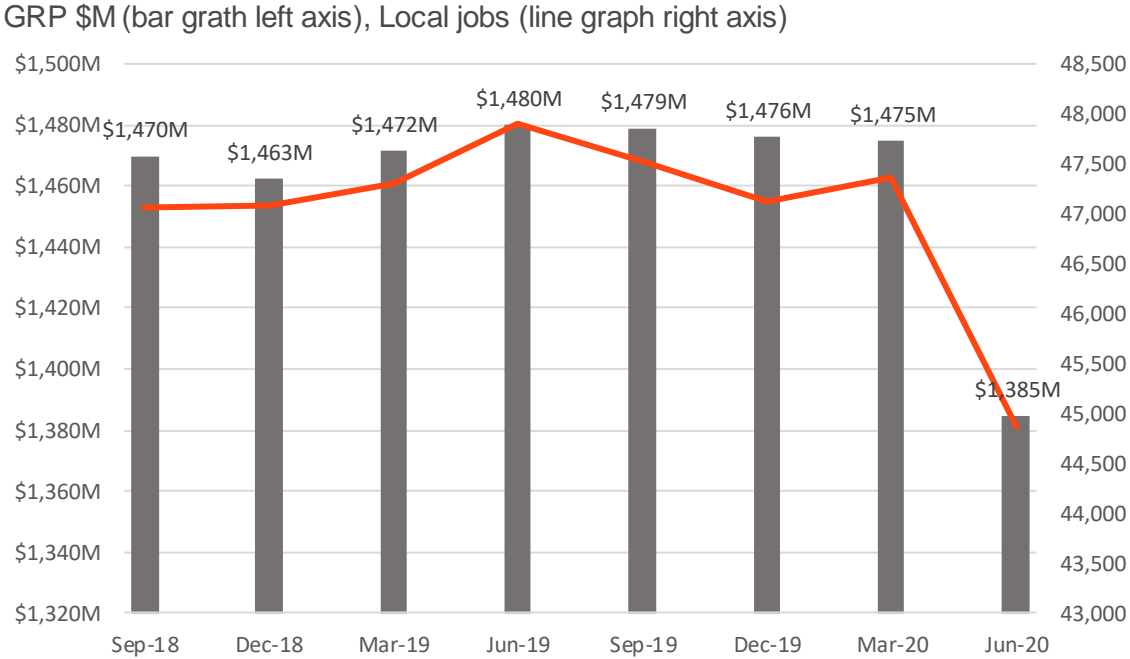
Source: NIEIR, 2020

# Impacts on local jobs higher than resident workers as the industry mix are more exposed to COVID-19 – a high share of non-essential population service industries

The outbreak of COVID-19 had a significant impact on the City of Charles Sturt's economy. The June Quarter 2020, saw an estimated \$90m fall in quarterly GRP and 2,494 jobs were lost in Charles Sturt.

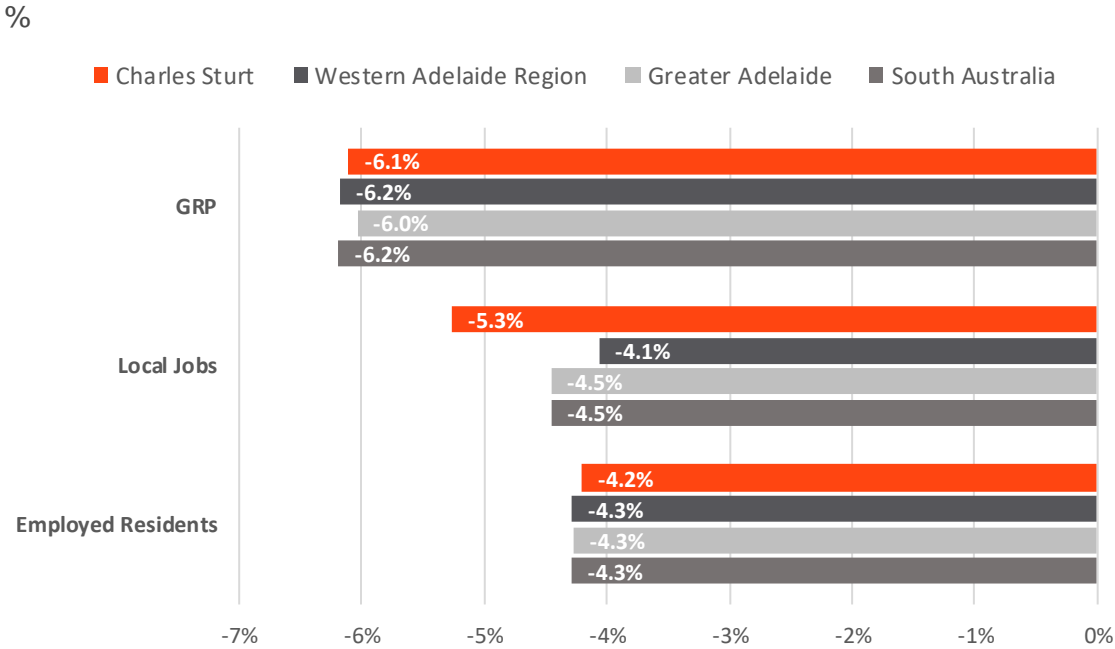
The City of Charles Sturt experienced an estimated 6.1% fall in GRP in the June Quarter 2020, similar to the Greater Adelaide average (-6.0%). Local jobs fell by 5.3%, significantly higher than other benchmarks. Conversely, employed resident jobs were less impacted, dropping by 4.2%, similar to other benchmark areas.

## Quarterly GRP and Jobs - Charles Sturt



Source: NIEIR, 2022

## March 2020 to June 2020 Change - Charles Sturt



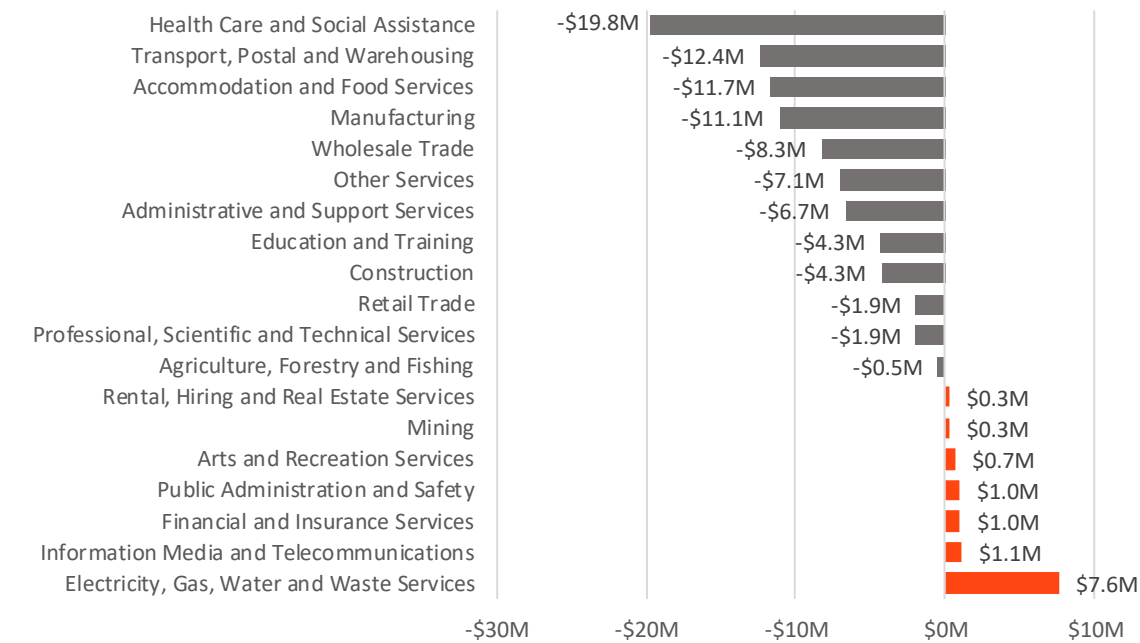
Source: NIEIR, 2022

# Disproportionate impacts on hospitality, retail and education sectors due to social distancing measures

The economic impact of the pandemic varied significantly across industries. In terms of value added, the main industries impacted in the June Quarter 2020 were Health Care and Social Assistance, Accommodation and Food Services, Transport, Postal and Warehousing and Manufacturing. The large decrease in Health Care and Social Assistance sector is driven by non-essential services such as child care and residential care services.

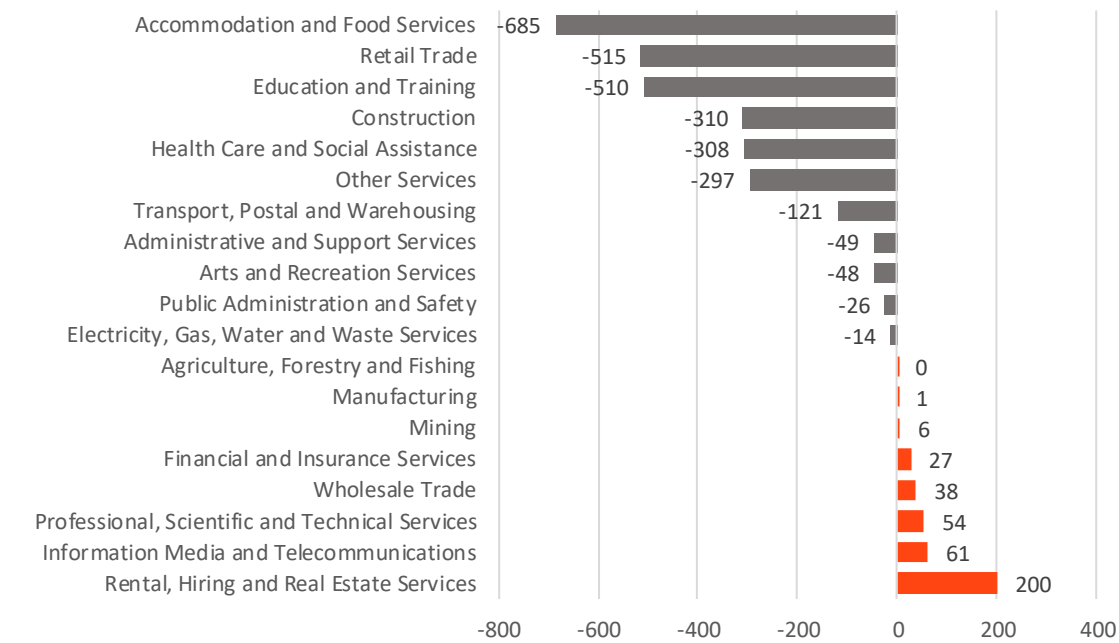
In terms of jobs, the main industries impacted in the June Quarter were Accommodation and Food Services, Retail Trade and Education and Training.

March 2020 to June 2020 Change, Value Added - Charles Sturt \$M



Source: NIEIR, 2022

March 2020 to June 2020 Change, Local Jobs - Charles Sturt Number of Jobs



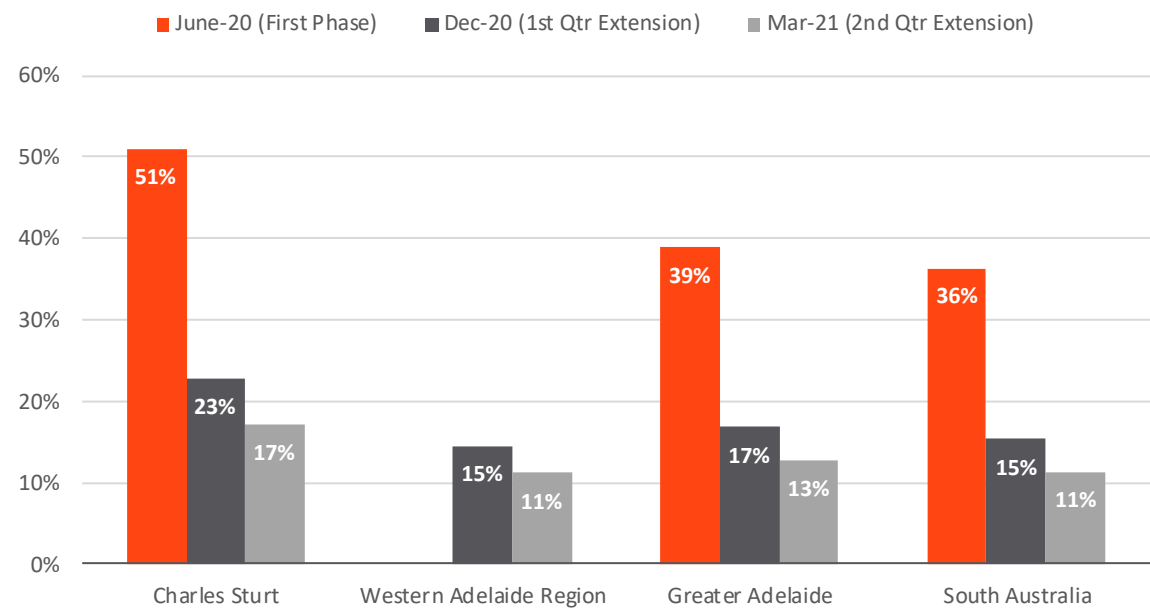
Source: NIEIR, 2022

# Businesses receiving JobKeeper support was much higher than other benchmark areas as the businesses are operating in the sectors more exposed to the impacts of COVID-19

Around 51% of all local businesses in Charles Sturt applied for JobKeeper support in June 2020. This rate was significantly higher than the Western Adelaide Region (33%), Greater Adelaide (39%) and South Australia (36%). This is due to businesses in Charles Sturt being in industries more exposed to the impact of COVID-19. The businesses accessing extended JobKeeper support decreased significantly but remains higher than the other benchmark averages.

## Businesses Accessing JobKeeper

% of total businesses



Source: Treasury, 2021

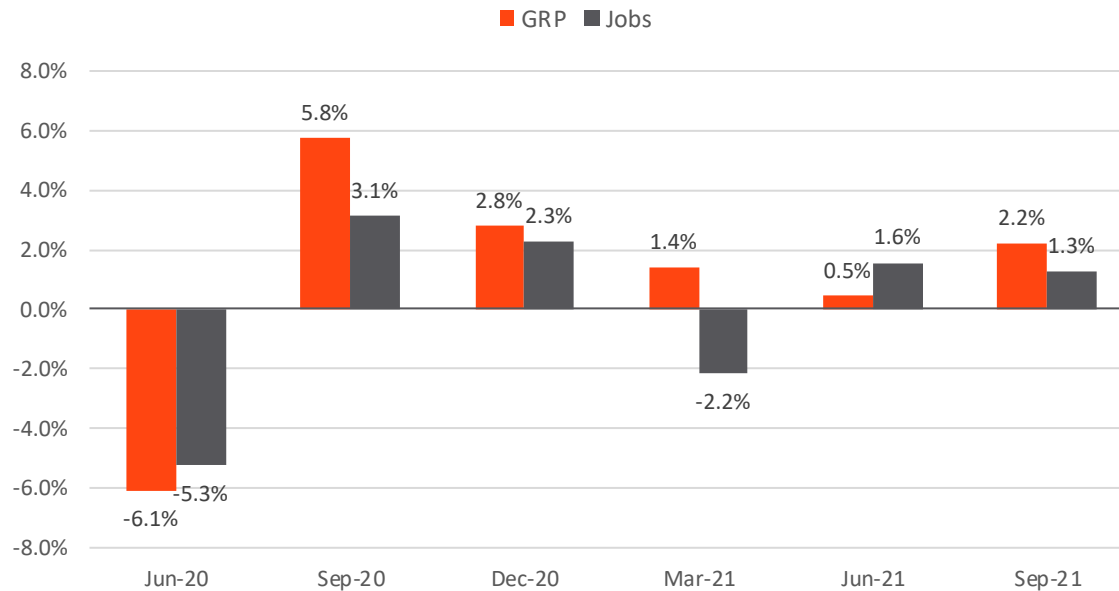
# 05 How is the recover from the COVID pandemic going?

## Many jobs were lost when JobKeeper ended. But the economy bounced back quickly

The City of Charles Sturt's GRP and Jobs were estimated to have staged a rebound in September Quarter 2020. GRP was estimated to have experienced a strong recovery, rising above the pre COVID-19 level in December Quarter 2020. After a mild rebound of 3.1% in the September Quarter 2020, jobs fell significantly as JobKeeper scheme ended. However, the jobs growth rebounded in June Quarter 2021 and resumed the economic recovery.

### Economic and Job Recovery Estimates - Charles Sturt

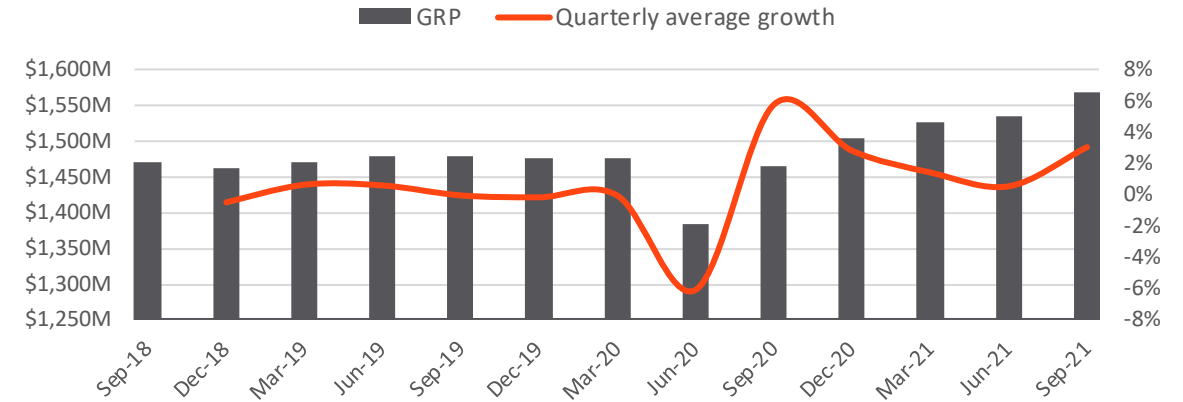
Quarterly % Change



Source: NIEIR, 2022

### GRP Estimate, Quarterly - Charles Sturt

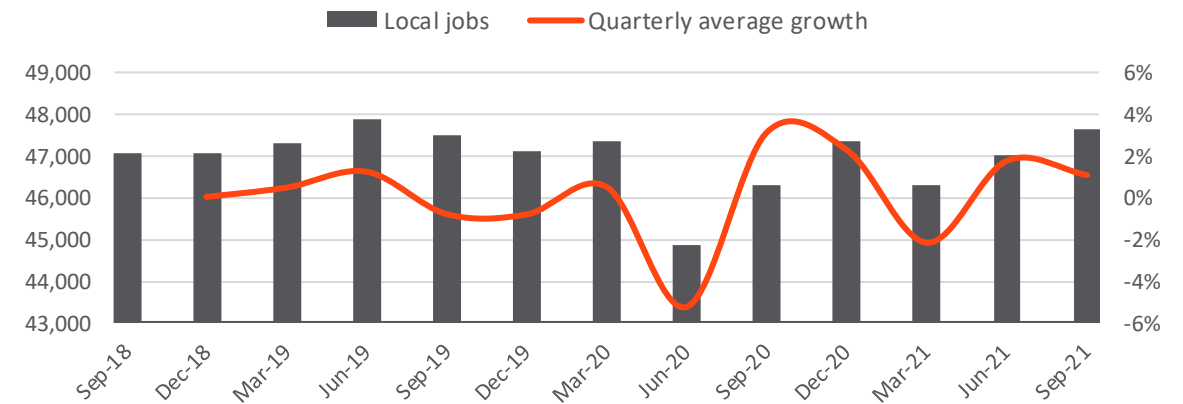
\$M (left axis), Quarterly % Change (right axis)



Source: NIEIR, 2022

### Local Jobs Estimate, Quarterly - Charles Sturt

Jobs (left axis), Quarterly % Change (right axis)



Source: NIEIR, 2022

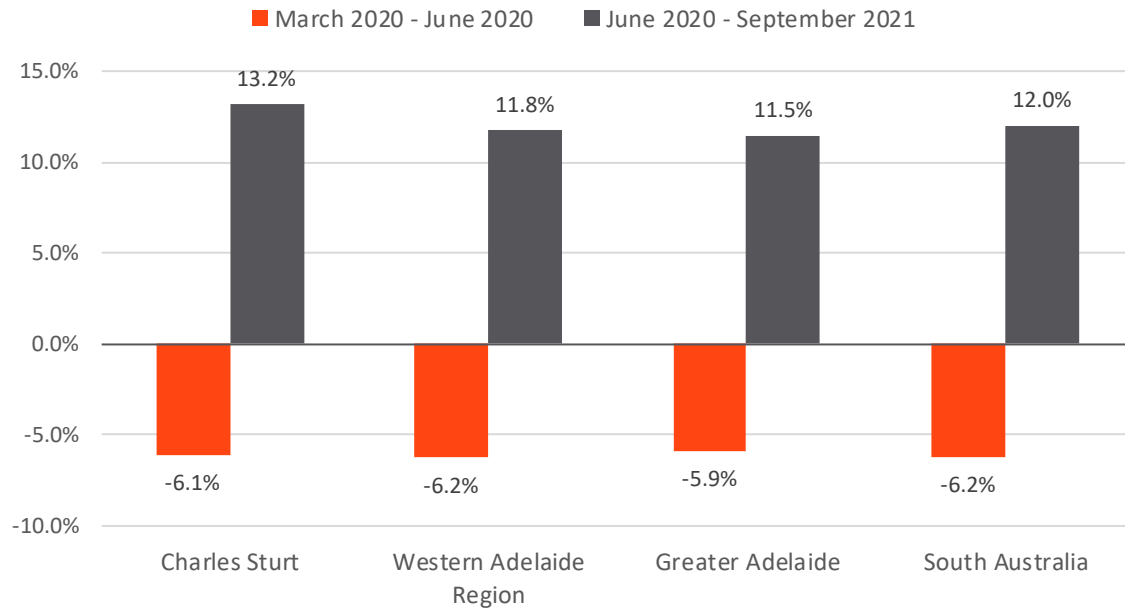
# Jobs recovery lower than the metro and state averages

GRP was estimated to grow by 13.2% over the period between June 2020 to September 2021. This rate was higher than other benchmark areas.

Local Jobs were estimated to grow by 6.2% over the period from June 2020 to September 2021. The jobs recovery rate during this period was slightly lower than the Greater Adelaide and the state averages despite the largest fall in jobs from March 2020 to June 2020.

## GRP Recovery Estimates - Charles Sturt

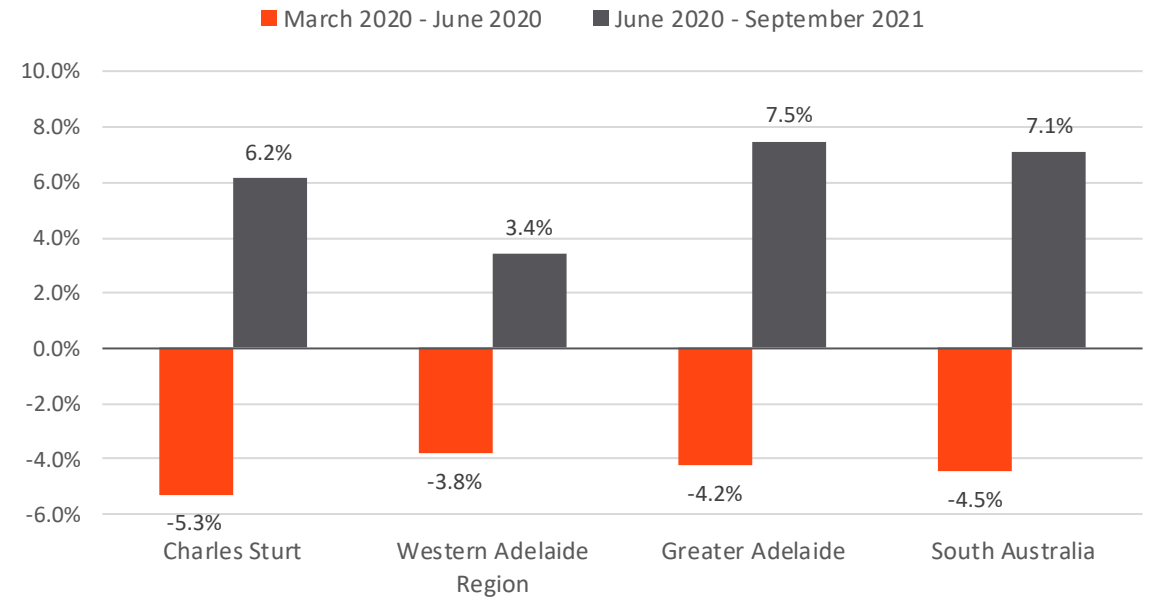
% Change



Source: NIEIR, 2022

## Job Recovery Estimates - Charles Sturt

% Change



Source: NIEIR, 2022

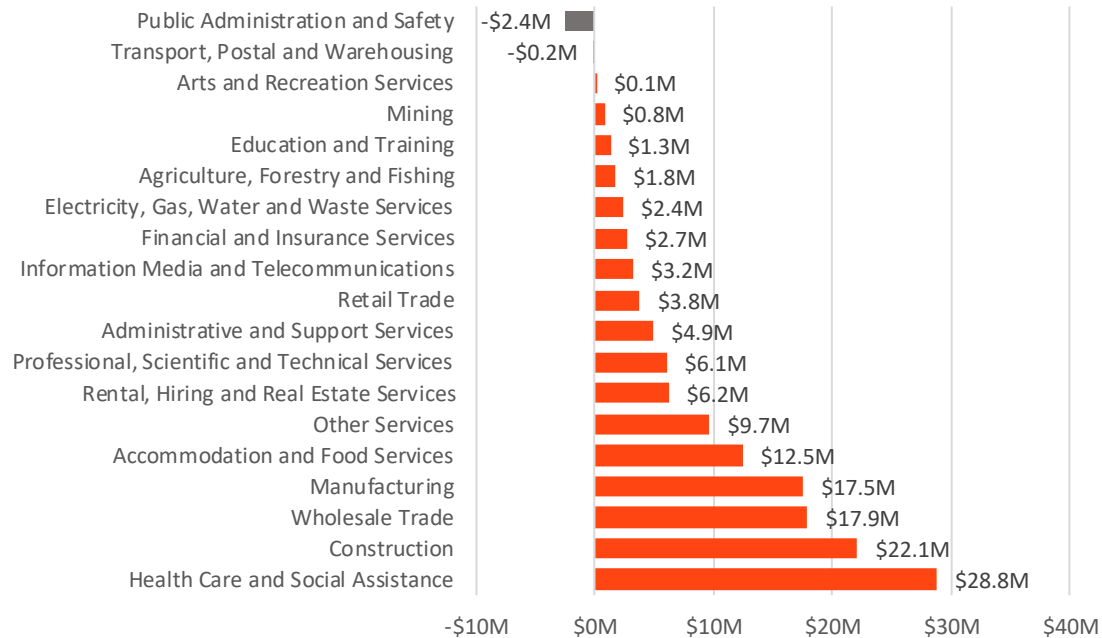


## Strong recovery in hardest hit industries

Most industries staged a recovery in economic value over the period from June 2020 to September 2021. The top three growth industries were Health Care and Social Assistance, Construction and Wholesale Trade. The Health Care industry was the most negatively impacted immediately following the outbreak of COVID-19.

### Estimated Value Added Change by Industry - Charles Sturt June 2020 to September 2021

\$M



Source: NIEIR, 2022

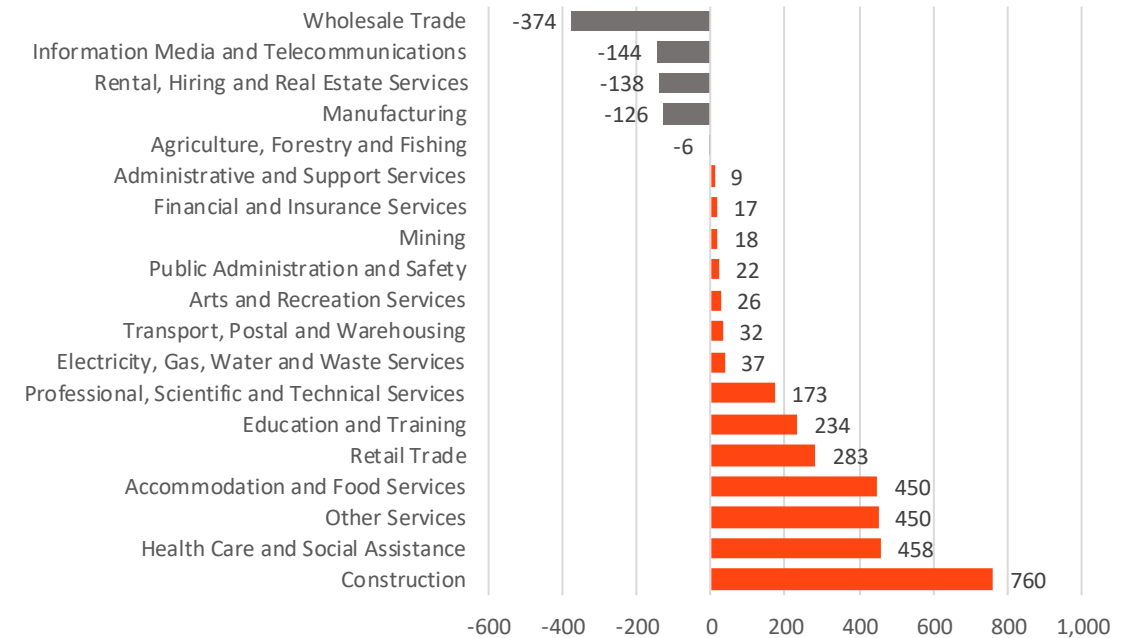
Jobs in Accommodation and Food Services recovered strongly over the period from June 2020 to September 2021.

The construction industry jobs and value added increased over the same period driven by strong construction activities.

The jobs in the industrial sectors, manufacturing and wholesale industries decreased during the same period as these industries continue to be impacted by COVID-19.

### Estimated Job Change by Industry - Charles Sturt June 2020 to September 2021

Number of Jobs



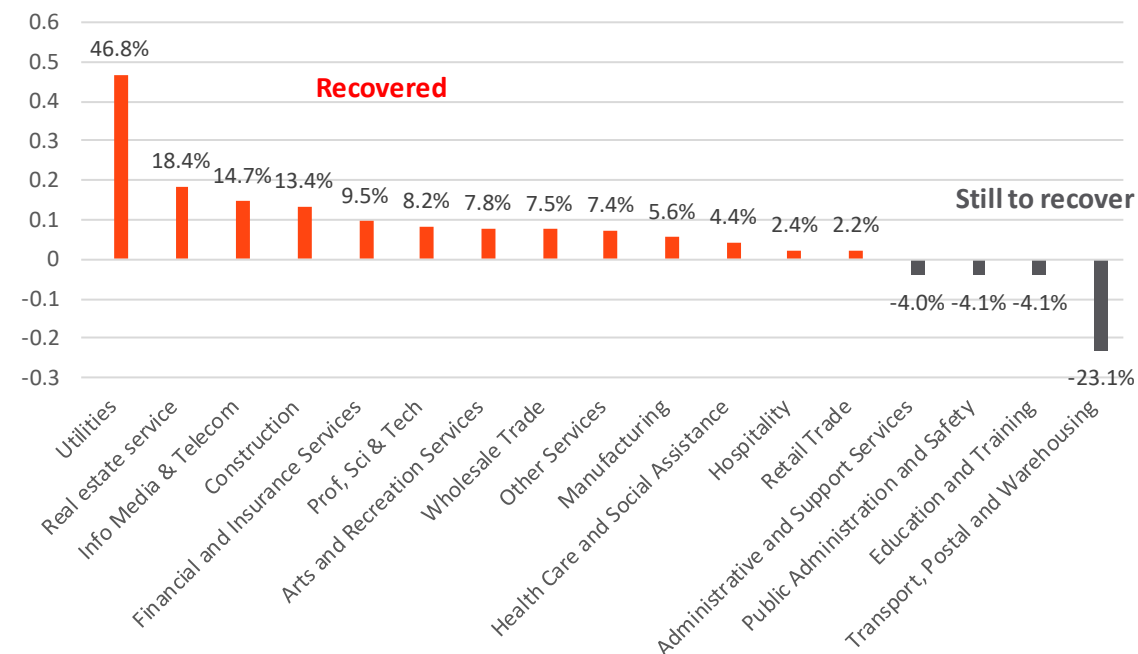
Source: NIEIR, 2022

# Jobs in many industries still below the pre COVID-19 level by September 2021

In September 2021, the value added in many industries had recovered and was above the pre COVID-19 (March Quarter 2020) level. However, Transport and logistics industry were well below the pre COVID-19 level as the value added in the industry further deteriorated.

## Recovery in Value Added by Industry - Charles Sturt September 2021 compared to March 2020

%, excluding Agriculture and Mining industries

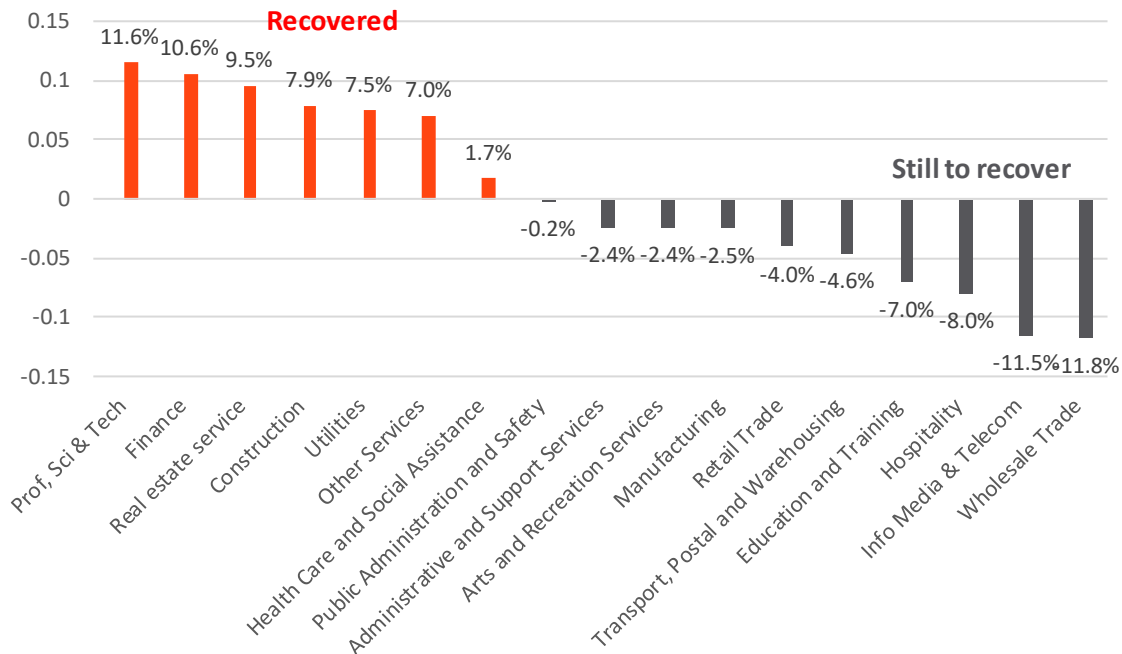


Source: NIEIR, 2022

Jobs in some industries recovered above the pre COVID-19 level in September 2021. The industries that are most impacted in June 2020 was still well below the pre COVID-19 level in September 2021.

## Recovery in Local Jobs by Industry - Charles Sturt September 2021 compared to March 2020

%, excluding Agriculture and Mining industries



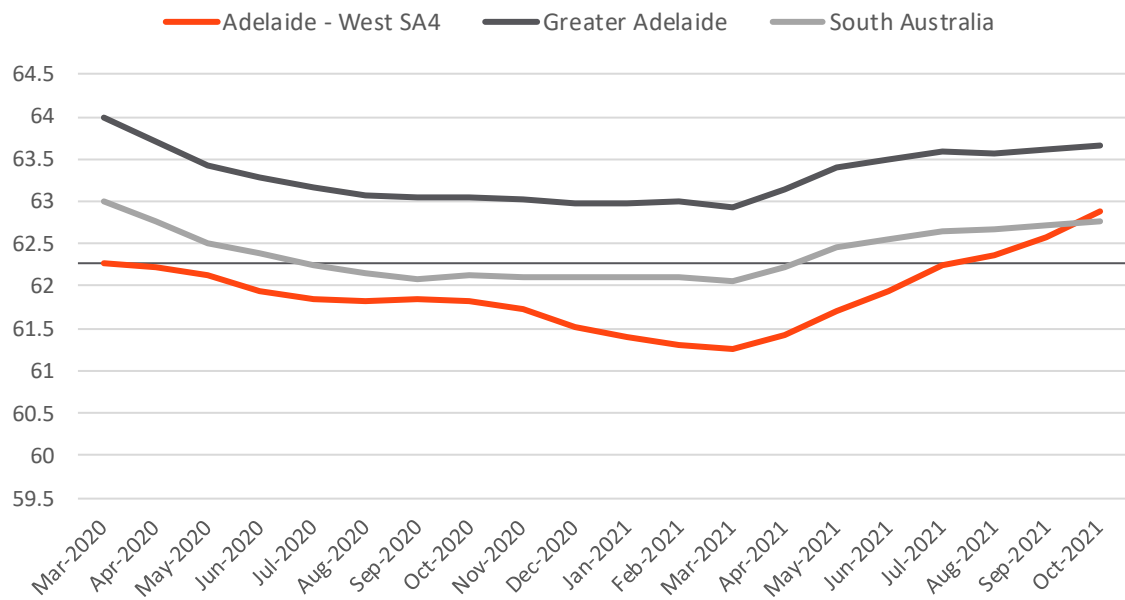
Source: NIEIR, 2022

## Residents are re-entering the jobs market. Retail, Transport, Administration, personal service and labour occupations are still below the pre COVID-19 level.

The labour force participation rate reached the lowest level of 61.3% in March 2021. Subsequently, the rate bounced above the pre COVID-19 level in August 2021 in the Adelaide - West SA4. The rate was higher than the South Australia average.

### Labour Force Participation Rate by SA4

%, pre COVID-19 benchmark = March 2020

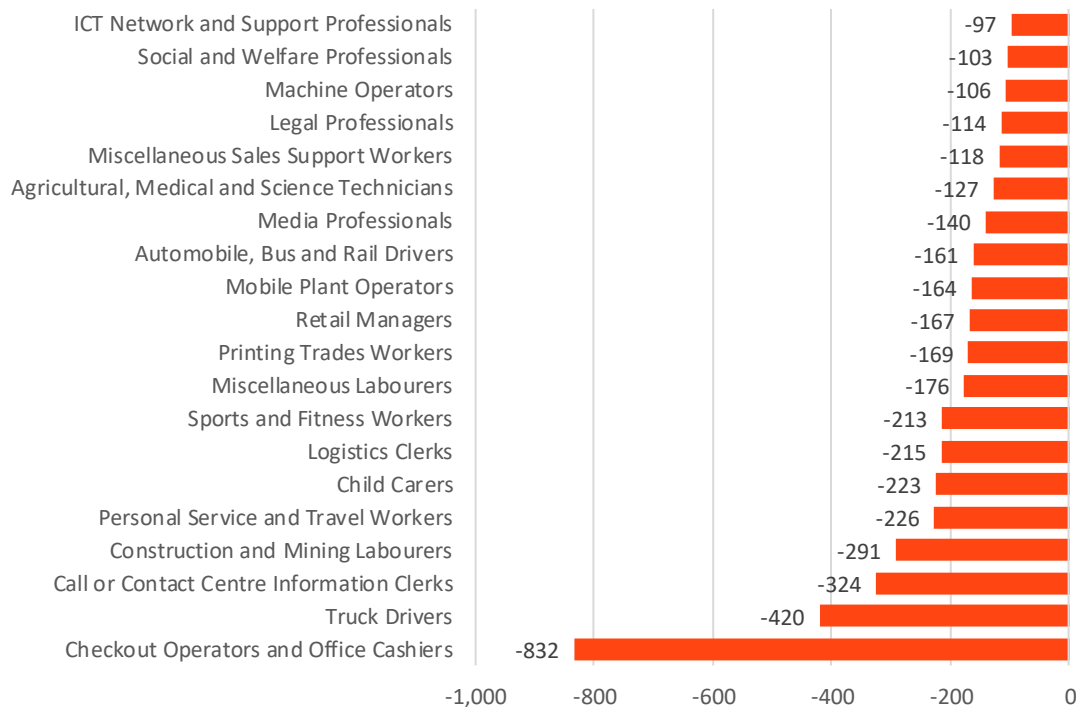


Source: ABS Labour Force, Australia, Detailed, 2021

The occupations that were most impacted by the recent lockdowns in Adelaide - West SA4 were Checkout Operators and Office Cashiers, Truck Drivers, Call centre clerks, and laborers. Generally, the most impacted occupations were in administration, transport, construction, general labour and sales occupations.

### Most Impacted Occupations

Adelaide - West, 15th March 2021 compared to 15th October 2021

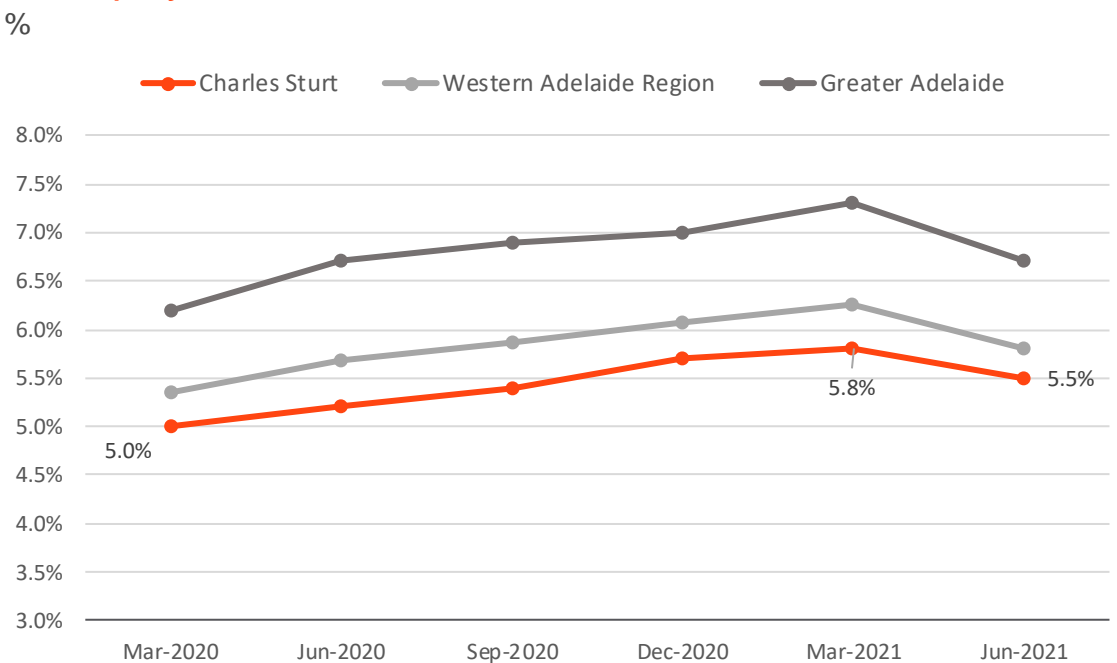


Source: Nowcast of Employment By Region And Occupation (NERO), 2021

# Resident's jobs condition has improved

The City of Charles Sturt's unemployment rate steadily increased by 0.8% in a year since the COVID-19 outbreak, from 5.0% in March 2020 to 5.8% in March 2021. This increase was slightly lower than the Western Adelaide Region average (+0.9%) and the Greater Adelaide average (1.1%). By June 2021, the unemployment rate in the City was 5.5%, 1.2% lower than the Greater Adelaide average.

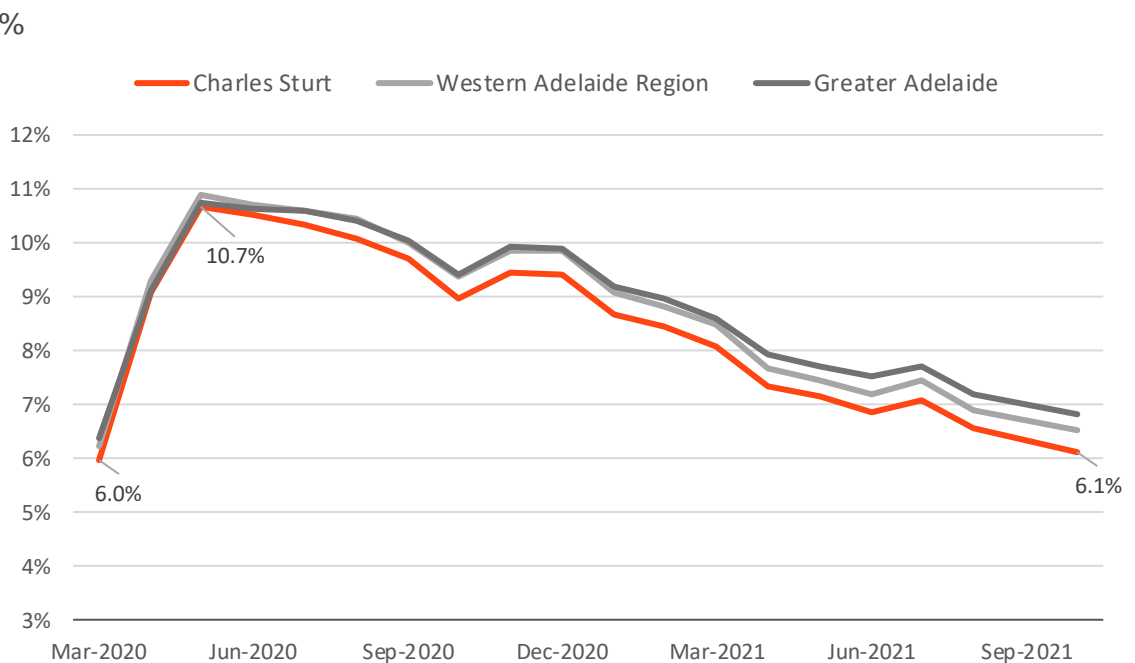
## Unemployment rate - Charles Sturt



Source: ABS Labour force survey (2021); Department of Employment SALM (2021)

The percentage of 15 to 64 years old residents on JobSeeker payments in Charles Sturt peaked at 10.7% in May 2020. This is an increase of 4.7% (+4,351 residents) from the March 2020 level. By October 2021, the percentage of 15 to 64 years old residents on JobSeeker had fallen back to 6.1%, marginally higher than the rate observed in March 2020.

## Share of residents on JobSeeker - Charles Sturt



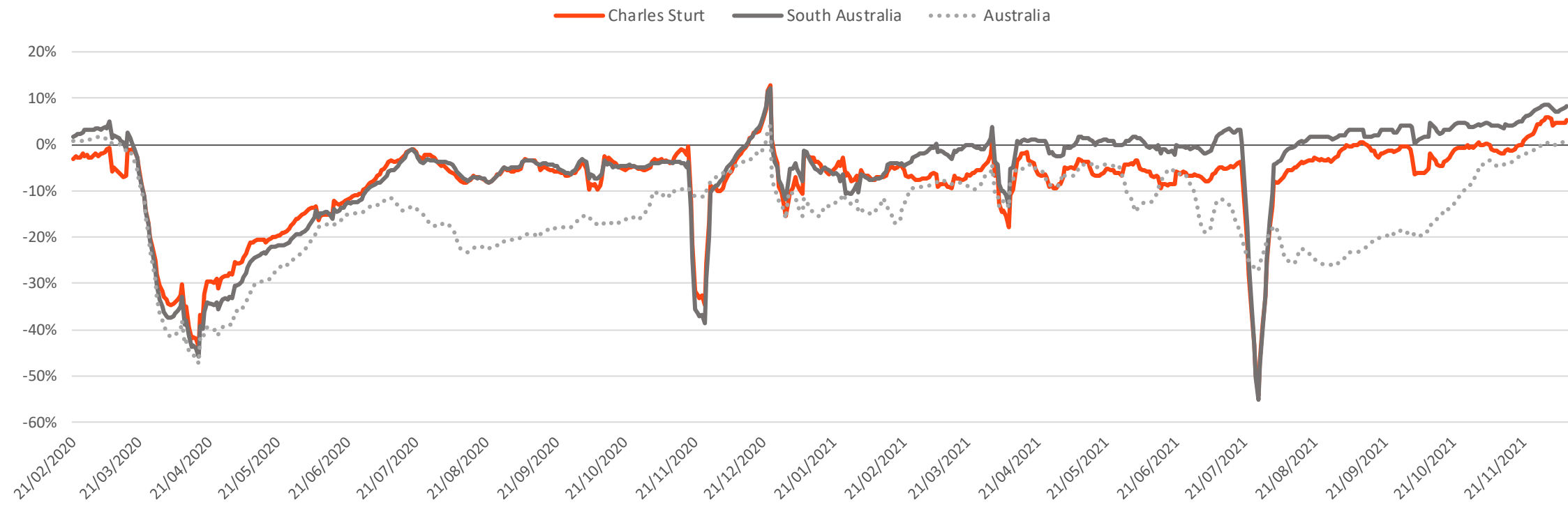
Source: Department of Social Services - JobSeeker and Youth Allowance recipients

# Visits to shops, hospitality and entertainment places fell by 40% in April but recovered almost back to pre-COVID level by August 2020

In the month of April 2020, travel movements to places of retail, recreation, hospitality and entertainment fell by around 40% compared to pre COVID benchmark level. The fall in movements was on par with the South Australia average. By August 2020, the movements recovered almost back to the pre COVID baseline level. Since then, the movements are fluctuating in line with the series of lockdown travel restrictions. In December 2021, mobility was around 5% higher than the baseline.

## Travel movements to retail and recreation venues - Charles Sturt

% change from base week, 7 day average



Source: Google Mobility Data, 2021

## Strong Non-Residential building approvals in December 2020 driven by the hospital redevelopment project. The project will provide construction and strategically important health jobs.

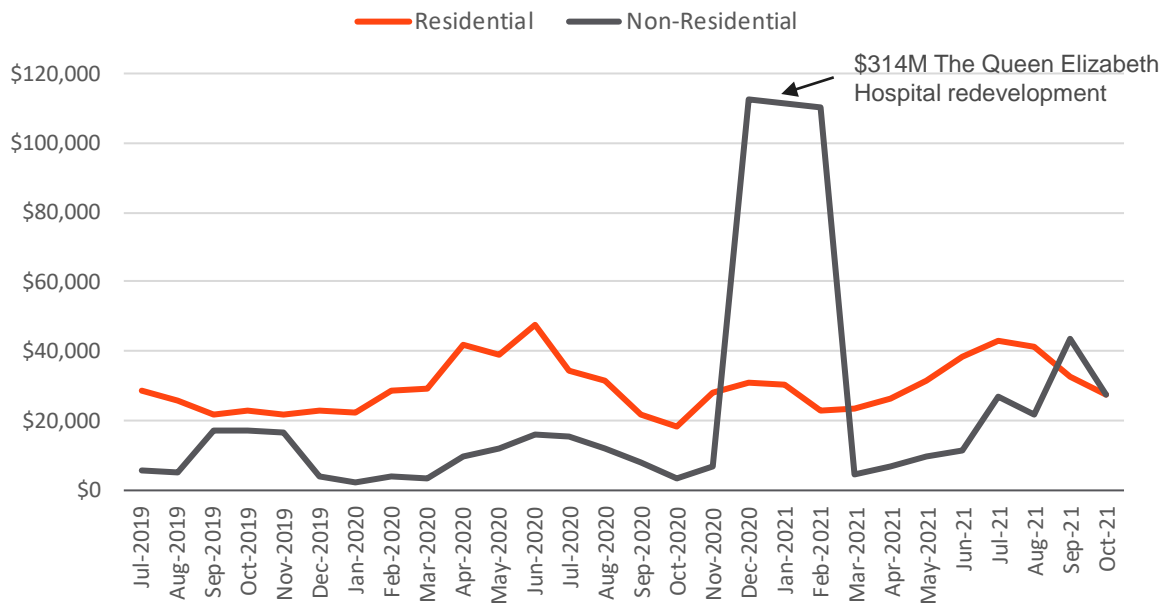
The non-residential building approvals activity remained relatively flat from July 2019 until December 2020. Residential approvals activity remained range bound between \$20 million to \$40 million.

Non-Residential building approvals started trending up in December 2020. This was driven by a \$314 million hospital redevelopment project.

The strong Non-Residential building approvals activity in FY2021 were driven by \$314 million The Queen Elizabeth Hospital redevelopment project approval in December 2020.

### Monthly Value of Building Approvals - Charles Sturt

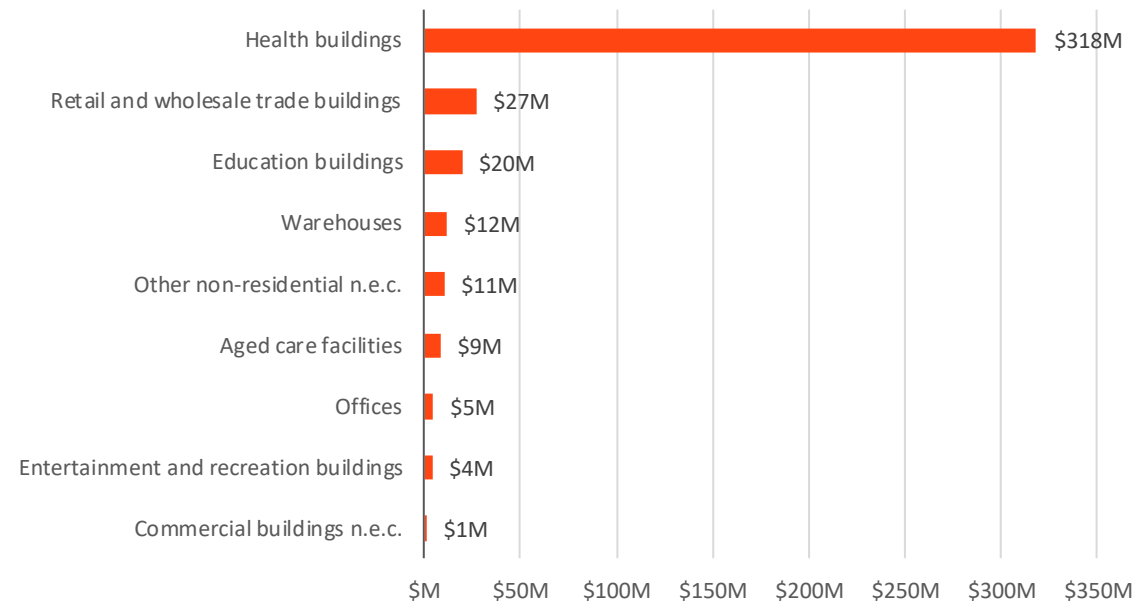
\$'000, 3 months rolling average



Source: ABS Building Approvals, 2021

### Non-Residential Building Approvals Value 2020/21

\$ million



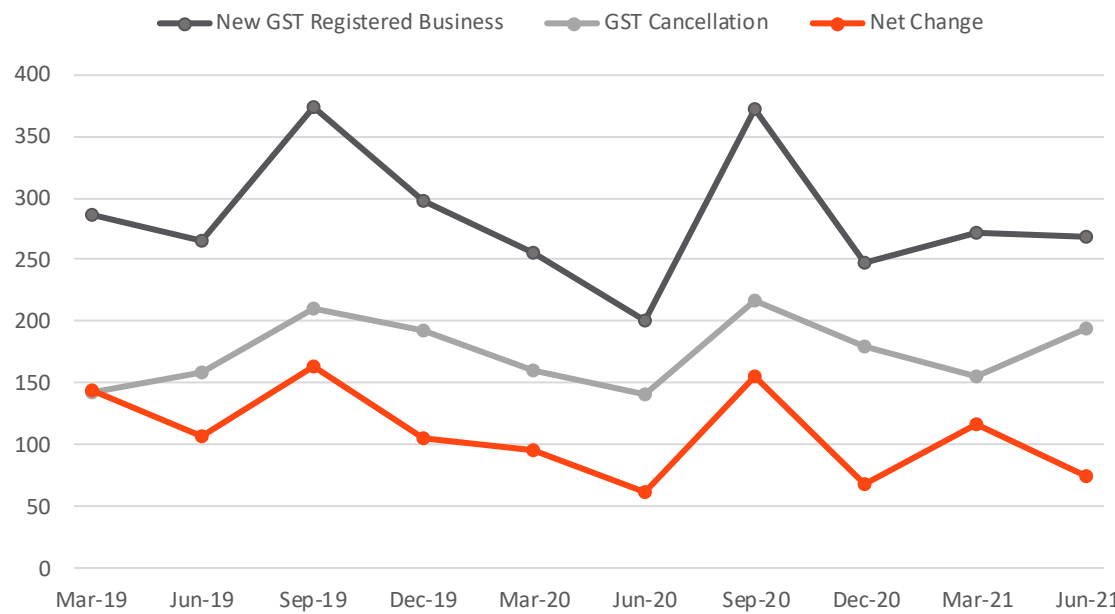
Source: ABS Building Approvals, 2021

# New business registration remain stable

After experiencing a strong growth until September Quarter 2019, the net change in businesses started to grow at a slower pace following the weakening of the economy. The net change in businesses reached a low of 61 in June Quarter 2020, 46 new businesses lower than a year before. After a strong surge in new businesses in September Quarter 2021, the decrease in net change in businesses appears to have stopped.

## Business entries and exits - Charles Sturt

Number of businesses



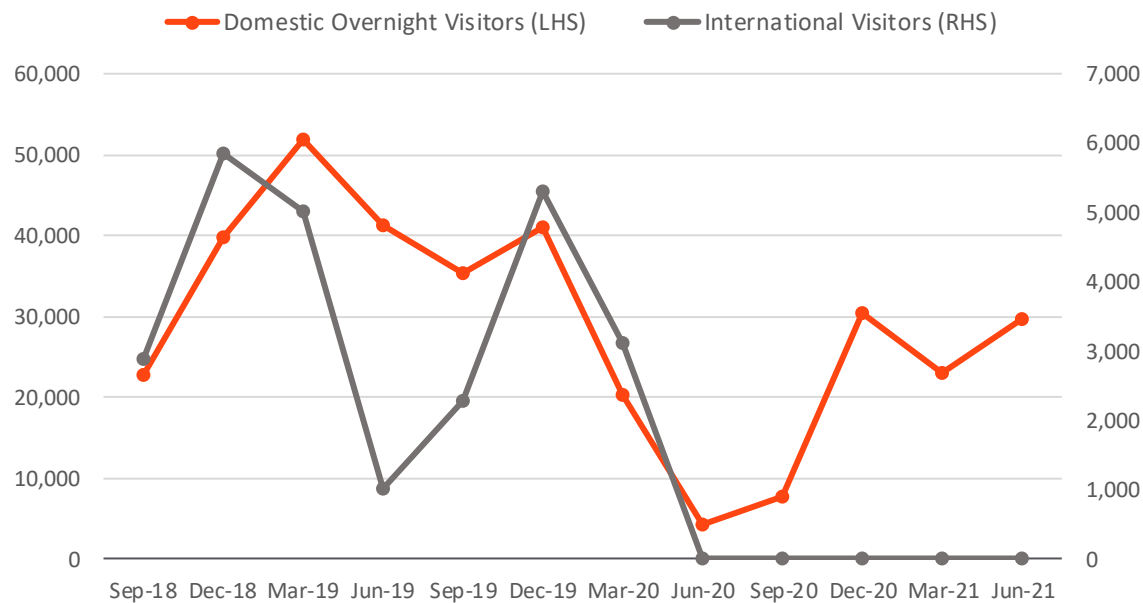
Source: Australian Business Register, 2021

# Domestic tourism is trending up again

Domestic overnight visitation started to trend down after peaking in March Quarter 2019. Following a steep decline in March and June Quarters 2020, the visitation recovered strongly in December Quarter 2020. The recovery continues in 2021 with estimated 30,000 domestic overnight visitors to Charles Sturt in June 2021.

## Visitation - Charles Sturt

Estimated number of visitors



Source: Tourism Research Australia, 2021



## Charles Sturt's longer-term economic vulnerability is relatively high. But the resident vulnerability appears low.

The COVID-19 pandemic has a dynamic nature and its short and long term impact on the economy is entirely uncertain. Although there is no historical event that we can compare against, there is a high possibility of Charles Sturt's economy facing further slowdowns in the coming years as rising inflation and falling national investment impact the broader economy.

Charles Sturt's economy was in a relatively vulnerable position pre COVID-19 as GRP and Jobs growth was already declining despite low unemployment and high construction activities. The economy also has a relatively higher post COVID-19 vulnerability as international immigration contributes a significant share of the population, where population growth is the main driver of economic growth. However, residents appear to be less vulnerable as they are employed in less exposed industries and lower share of at-risk groups.

	Indicator	Charles Sturt	Greater Adelaide	South Australia	Higher/Lower (compared to the state)	Vulnerability score (L - M -H)
<b>Pre-COVID vulnerability</b>	GRP Growth (2018/19, 3-year AAG)	1%	2%	2%	Lower	H
	Job Growth (2018/19, 3-year AAG)	1%	2%	2%	Lower	H
	Unemployment Rate 2019	5%	6%	6%	Lower	L
	Building Approvals (2018/19 compared to 2015/16 - 3-year average)	43%	33%	28%	Higher	L
<b>Post-COVID Economic Vulnerability</b>	Share of main impacted industries	9%	8%	8%	Higher	M
	International export exposure	6%	7%	9%	Lower	L
	Share of visitation related to international	56%	48%	31%	Higher	M
	Contribution of international migration to pop growth	84%	103%	100%	Lower	H
	Youth share of workforce	16%	14%	14%	Higher	M
	Part time workers	40%	38%	38%	Higher	M
<b>Resident vulnerability</b>	Share of main impacted industries	9%	8%	8%	Higher	M
	Youth share of employed residents	14%	14%	14%	Higher	L
	Part time employed	37%	38%	38%	Lower	M
	Disengaged youth	8%	10%	10%	Lower	L
	Mortgage exposure (low income)	10%	16%	16%	Lower	L
	Private rent exposure (low income)	21%	25%	24%	Lower	L

Source: ABS Census, 2016; NIEIR, 2021

# 06 Which industries are competitive and how is this changing?

## Developed specialisations in goods manufacturing and sales as well as population servicing sectors

Charles Sturt has a major comparative advantage in Wholesale Trade, Manufacturing, Construction, Arts and Recreation Services, Retail Trade, Other Services and Health Care and Social Assistance industries.

### Level of specialisation - Charles Sturt

Compared to Greater Adelaide (in LQ terms)

	Jobs	Value Added \$m
Wholesale Trade	1.79	2.00
Construction	1.54	1.53
Other Services	1.23	1.39
Health Care and Social Assistance	1.22	1.39
Manufacturing	1.21	1.33
Arts and Recreation Services	1.15	1.18
Retail Trade	1.15	1.26
Rental, Hiring and Real Estate Services	1.07	1.05
Administrative and Support Services	1.00	1.06
Accommodation and Food Services	0.93	1.06
Tourism and Hospitality *	0.91	0.90
Information Media and Telecommunications	0.90	1.10
Education and Training	0.84	0.82
Transport, Postal and Warehousing	0.81	0.76
Professional, Scientific and Technical Services	0.58	0.61
Electricity, Gas, Water and Waste Services	0.53	0.59
Public Administration and Safety	0.47	0.38
Financial and Insurance Services	0.30	0.38
Agriculture, Forestry and Fishing	0.14	0.25
Mining	0.11	0.11

Source: NIEIR, 2022 | \* Includes activities from other industries; preliminary value

At a detailed industry level, industries with the highest specialisations were Pulp, Paper and Converted Paper Product Manufacturing driven by major companies, DetPak, Paper Pak and Ball & Doggett.

### Specialisation by detailed industry - Charles Sturt

Compared to Greater Adelaide (in LQ terms)

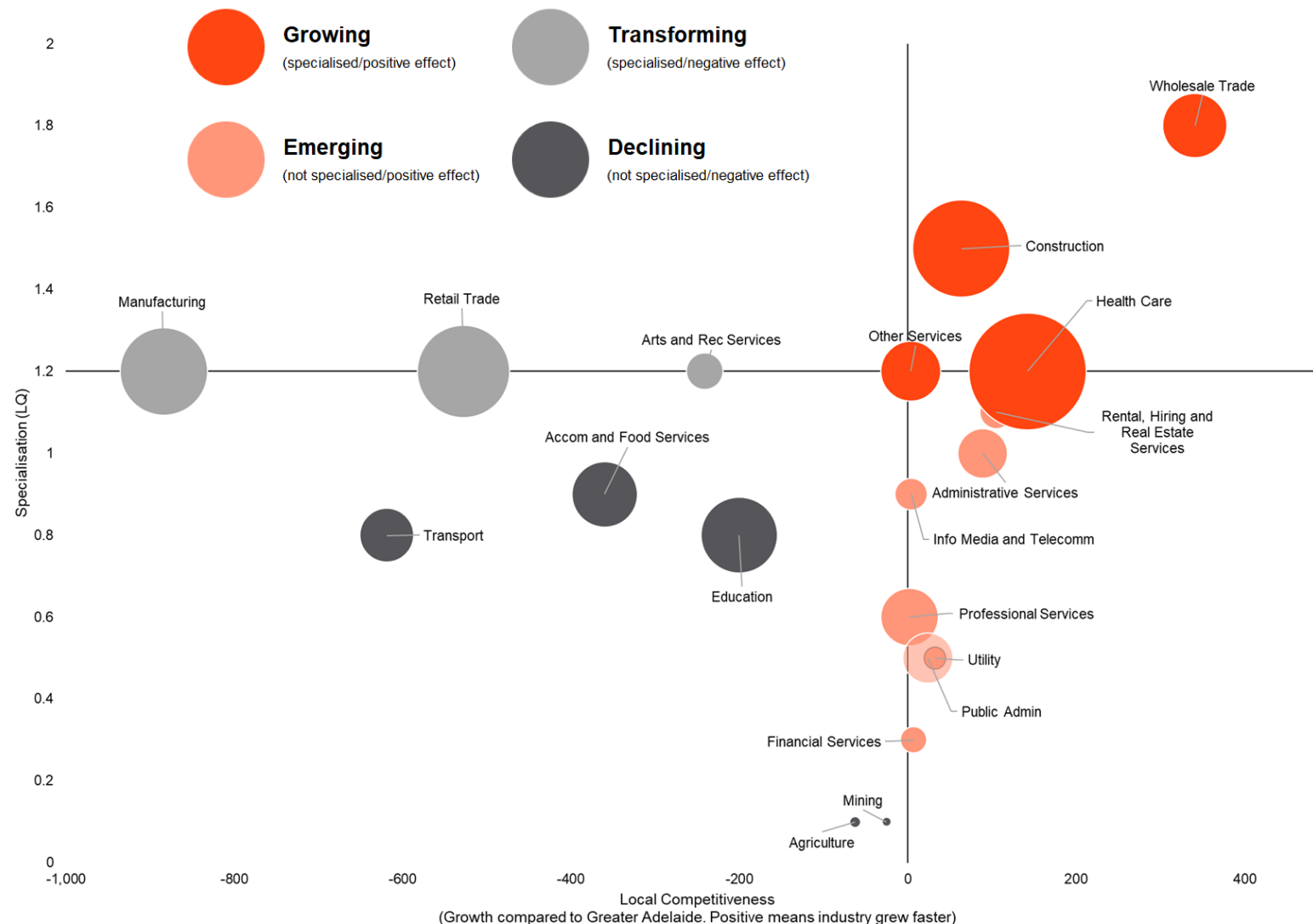
Industry	Jobs	% of total	Specialisation
Pulp, Paper and Converted Paper Product Manufacturing	519	1.1%	5.09
Commission-Based Wholesaling	104	0.2%	3.09
Other Transport	150	0.3%	2.93
Gas Supply	157	0.3%	2.75
Grocery, Liquor and Tobacco Product Wholesaling	824	1.8%	2.75
Non-Metallic Mineral Product Manufacturing	395	0.8%	2.37
Other Goods Wholesaling	567	1.2%	2.24
Printing (including the Reproduction of Recorded Media)	265	0.6%	2.21
Broadcasting (except Internet)	225	0.5%	2.08
Furniture and Other Manufacturing	351	0.8%	1.62
Building Construction	1,795	3.8%	1.60
Construction Services	3,825	8.2%	1.58
Sports and Recreation Activities	627	1.3%	1.54
Polymer Product and Rubber Product Manufacturing	305	0.7%	1.52
Machinery and Equipment Manufacturing	860	1.8%	1.48

Source: NIEIR, 2022

# Population service sectors are driving growth

Charles Sturt's sectors can be categorised into four stages of development relative to their recent performance, size and degree of specialisation. The chart on the left displays which stage of the development each industry is in based on the specialisation in 2021 and the jobs growth from 2016 to 2021 attributed to the local factor and advantage\*.

- **Growing** – established with strong growth potential: Sectors in this category are well established, specialised and have strong growth potential based on recent trends. Charles Sturt's 'growing' sectors include Health, Construction, Wholesale trade and Other services compared to Greater Adelaide.
- **Emerging** – growing with potential to become specialised: Despite a low specialisation in jobs, sectors in the 'emerging' category have grown faster than Greater Adelaide and may have the future potential to thrive. The top two 'emerging' sectors are Rental, hiring and real estate services and Administrative services.
- **Transforming** – established but facing challenges: The 'Transforming' sectors are specialised but are not growing as fast as the Greater Adelaide averages. This suggests they are at risk and need support to maintain competitiveness with other regions. The sectors that fall into the 'transforming' category are Manufacturing, Retail, Arts and recreation services.
- **Declining** – neither established nor growing: These sectors are either small and do not impact the overall competitiveness of the economy (i.e. agriculture and mining) or service sectors that are relatively less competitive against industrial LGAs (i.e. transport). However, the Accommodation and Food Service industry is an important industry that has been declining over the last two years. The industry may be at risk without intervention.

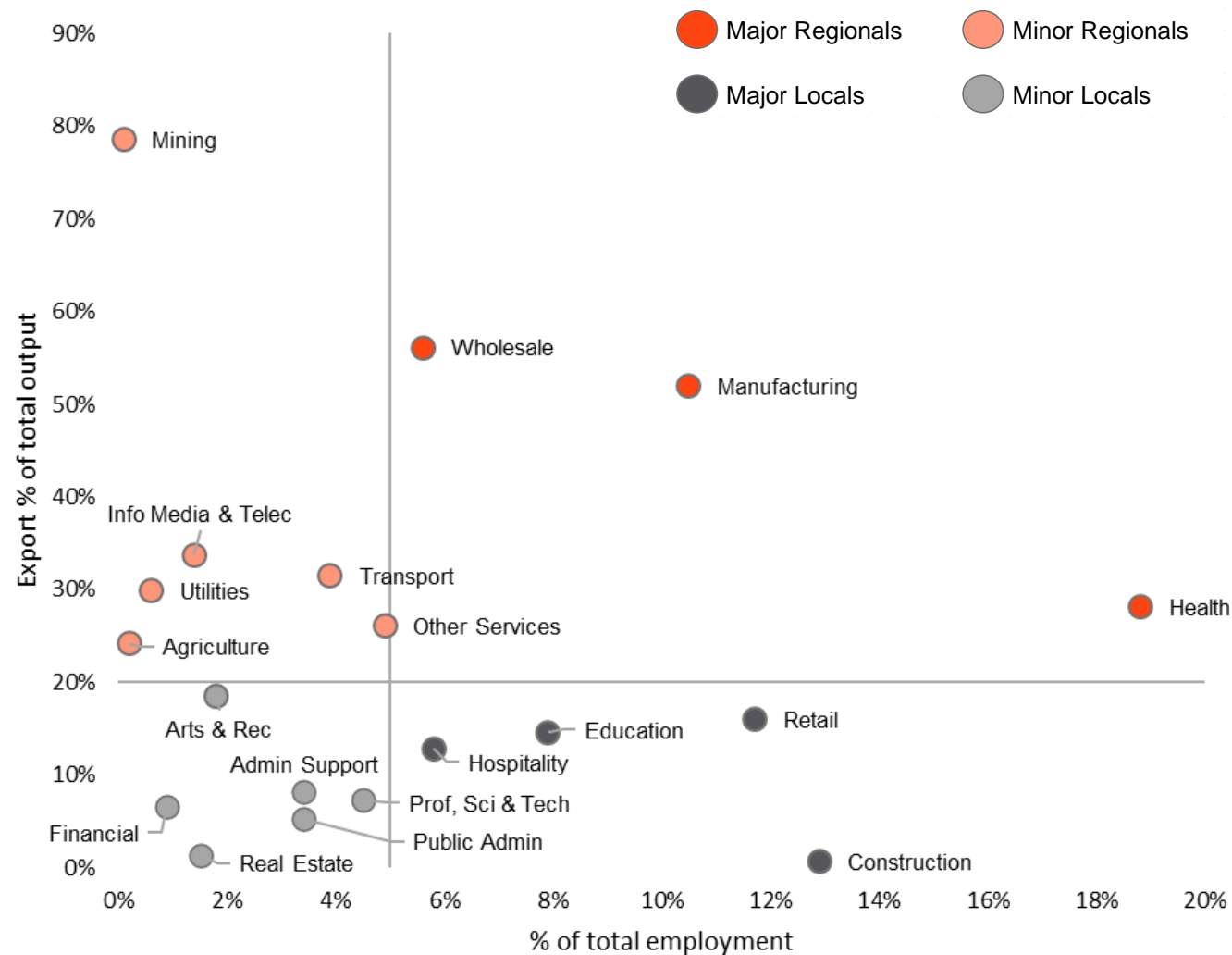


## Major export sectors include manufacturing, wholesale and health. Strategies should seek to improve the competitiveness and supply chains of these sectors.

The local economy benefits from the export of goods and services outside the City's boundary. The export sectors are less reliant on the local population to grow. The sectors can be categorised into four based on the export share of total output and the industry's share of the total LGA employment.

Importantly, there are four industries in the Charles Sturt economy with major regional exposure (i.e high export and a high share of total employment). These are manufacturing, wholesale, health and retail trade industries.

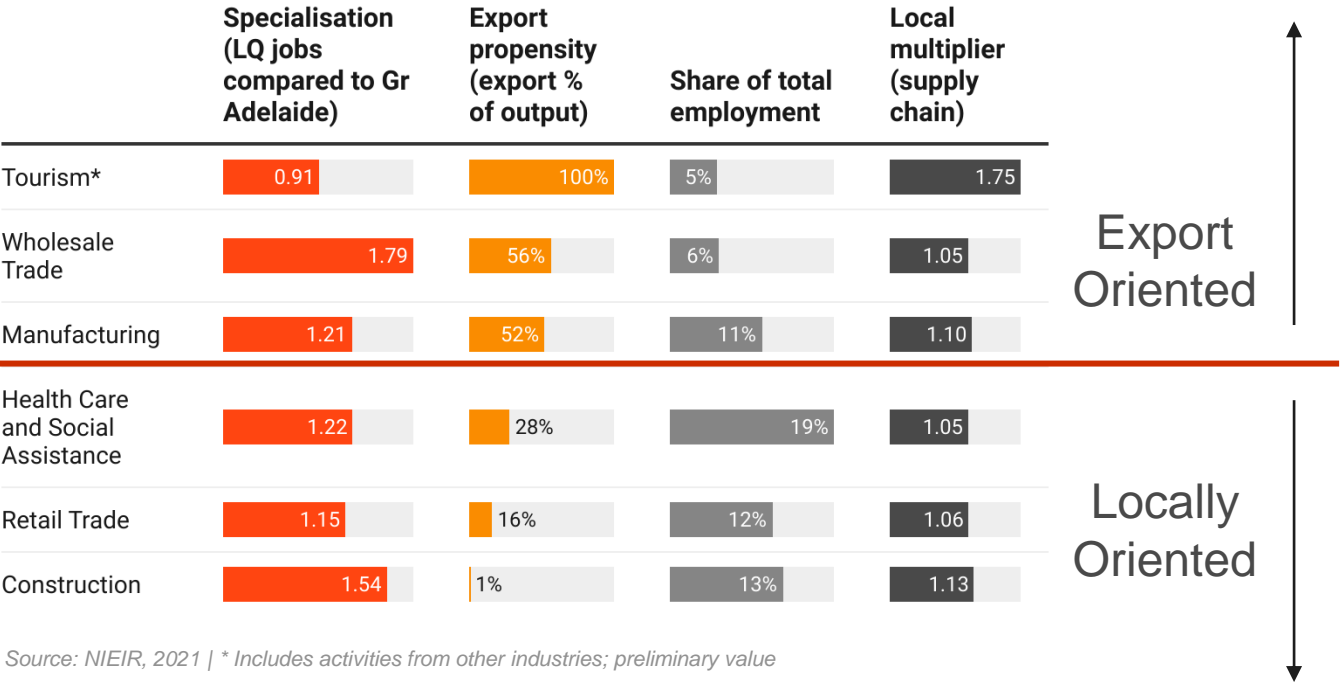
- There are two export oriented major regional industries in Charles Sturt. Wholesale trade has a strong regional market position, exporting 56% of its output and categorised as a growing industry. Manufacturing has a considerable regional market position, exporting 52% of its output, or 30% of the City's total exports, and has an important role in employment generation. However, the industry is categorised as 'Transforming' industries in Charles Sturt and need special attention.
- A major regional industry with a local focus but have a high share of exports and employment is Health care industry. Health is the largest industry in Charles Sturt, employing 19% of all jobs and exporting 28% of its output. The industry is in the 'Growing' category and are important drivers of future growth.



# Leverage strategic industries to drive the Economic Development key focus areas

## Strategic Industry Analysis

Charles Sturt, 2020/21



### Export sectors

- Less reliant on local population limits
- Can help grow jobs faster than the population
- Supply chain opportunities to capture more local spend and expenditure
- Related specialisation around manufacturing and wholesale
- Tourism – Infrastructures (Coopers Stadium, Adelaide Entertainment Centre and Titanium Security Arena)

### Locally oriented

- Health - large institutions + anchors (e.g. TQEH)
- Retail Trade - important place making role
- Construction – a high multiplier effect

### Economic Development Opportunities

- Encourage projects that help improve competitiveness and increase export potential
- Clustering opportunities in related specialisations (e.g. Health, Advanced Manufacturing and Research)
- Working with institutions to magnify their impact
- Opportunities to improve local supply chains and increase local procurement
- Using anchors to activate places

## Industry snapshot - Health Care and Social Assistance

Jobs	Economic activity	Worker productivity
Number of persons	Value added	Value added per worker
8,781	\$844m	\$96,118
1.4%	5.5%	4.1%
Greater Adelaide 1.0%	Greater Adelaide 5.2%	Greater Adelaide 4.1%
p.a. growth 2016 - 2021	p.a. growth 2016 - 2021	p.a. growth 2016 - 2021

### Health Care and Social Assistance industries

Employment, 2021

Social Assistance Services	2,735
Hospitals	2,733
Medical and Other Health Care Services	1,830
Residential Care Services	1,483

### Recent performance

Specialisation (LQ)	5 yr change
Social Assistance Services	1.4 608
Hospitals	1.3 143
Medical and Other Health Care Services	0.9 -18
Residential Care Services	1.2 -153

### Key drivers

- Population growth
- 65+ year olds
- Health risk factors
- Government spending

## Industry snapshot - Retail Trade

Jobs	Economic activity	Worker productivity
Number of persons	Value added	Value added per worker
5,487	\$359m	\$65,349
-2.1%	-0.3%	1.8%
Greater Adelaide -0.3%	Greater Adelaide 1.4%	Greater Adelaide 1.7%
p.a. growth 2016 - 2021	p.a. growth 2016 - 2021	p.a. growth 2016 - 2021

### Retail Trade industries

Employment, 2021

Other Store-Based Retailing	2,839
Food Retailing	2,199
Motor Vehicle and Motor Vehicle Parts Retailing	289
Fuel Retailing	129
Non-Store Retailing and Retail Commission Based Buying	32

### Recent performance

	Specialisation (LQ)	5 yr change
Other Store-Based Retailing	1.1	-157
Food Retailing	1.3	-333
Motor Vehicle and Motor Vehicle Parts Retailing	0.9	-69
Fuel Retailing	0.8	-20
Non-Store Retailing and Retail Commission Based Buying	0.5	-29

### Key drivers

- Population
- Demographics
- Discretionary income
- Competition from online shopping



## Industry snapshot - Construction

Jobs	Economic activity	Worker productivity
Number of persons	Value added	Value added per worker
6,033	\$558m	\$92,428
2.8%	3.2%	0.4%
Greater Adelaide 2.6%	Greater Adelaide 0.4%	Greater Adelaide -2.1%
p.a. growth 2016 - 2021	p.a. growth 2016 - 2021	p.a. growth 2016 - 2021

### Construction industries

Employment, 2021

Construction Services	3,825
Building Construction	1,795
Heavy and Civil Engineering Construction	413

### Recent performance

	Specialisation (LQ)	5 yr change
Construction Services	1.6	150
Building Construction	1.6	459
Heavy and Civil Engineering Construction	1.1	166

### Key drivers

- Residential demand
- Macro economic outlook
- Government spending
- Credit availability

## Industry snapshot - Manufacturing

Jobs	Economic activity	Worker productivity
Number of persons	Value added	Value added per worker
4,914	\$471m	\$95,927
-2.1%	-3.2%	-1.2%
Greater Adelaide 1.2%	Greater Adelaide 0.1%	Greater Adelaide -1.1%
p.a. growth 2016 - 2021	p.a. growth 2016 - 2021	p.a. growth 2016 - 2021

### Manufacturing industries

Employment, 2021

Machinery and Equipment Manufacturing	860
Food Product Manufacturing	828
Transport Equipment Manufacturing	566
Pulp, Paper and Converted Paper Product Manufacturing	519
Non-Metallic Mineral Product Manufacturing	395
Furniture and Other Manufacturing	351.5
Polymer Product and Rubber Product Manufacturing	305.0
Printing (including the Reproduction of Recorded Media)	264.9
Fabricated Metal Product Manufacturing	235.8
Textile, Leather, Clothing and Footwear Manufacturing	159.4
Primary Metal and Metal Product Manufacturing	133.5
Basic Chemical and Chemical Product Manufacturing	132.4
Wood Product Manufacturing	98.2
Beverage and Tobacco Product Manufacturing	66.8

### Recent performance

	Specialisation (LQ)	5 yr change
Machinery and Equipment Manufacturing	1.5	-103
Food Product Manufacturing	0.9	-77
Transport Equipment Manufacturing	1.1	30
Pulp, Paper and Converted Paper Product Manufacturing	5.1	-70
Non-Metallic Mineral Product Manufacturing	2.4	-107
Furniture and Other Manufacturing	1.6	10
Polymer Product and Rubber Product Manufacturing	1.5	-34
Printing (including the Reproduction of Recorded Media)	2.2	-68
Fabricated Metal Product Manufacturing	0.9	-24
Textile, Leather, Clothing and Footwear Manufacturing	1.4	-50
Primary Metal and Metal Product Manufacturing	0.6	-25
Basic Chemical and Chemical Product Manufacturing	0.8	0
Wood Product Manufacturing	0.7	-29
Beverage and Tobacco Product Manufacturing	0.2	2

### Key drivers

- Building construction
- Industrial demand
- Business inventories
- Discretionary income

## Industry snapshot - Wholesale Trade

Jobs	Economic activity	Worker productivity
Number of persons	Value added	Value added per worker
2,625	\$542m	\$206,404
Greater Adelaide 1.2%	Greater Adelaide 3.7%	Greater Adelaide 2.4%
p.a. growth 2016 - 2021	p.a. growth 2016 - 2021	p.a. growth 2016 - 2021

### Wholesale Trade industries

Employment, 2021

Grocery, Liquor and Tobacco Product Wholesaling	824
Other Goods Wholesaling	567
Machinery and Equipment Wholesaling	567
Basic Material Wholesaling	381
Motor Vehicle and Motor Vehicle Parts Wholesaling	182
Commission-Based Wholesaling	104.3

### Recent performance

	Specialisation (LQ)	5 yr change
Grocery, Liquor and Tobacco Product Wholesaling	2.8	111
Other Goods Wholesaling	2.2	121
Machinery and Equipment Wholesaling	1.4	106
Basic Material Wholesaling	1.2	53
Motor Vehicle and Motor Vehicle Parts Wholesaling	1.2	61
Commission-Based Wholesaling	3.1	25

### Key drivers

- Demand from residential construction
- Demand from non-residential construction
- Population
- Demand from supermarkets

## Industry snapshot - Tourism and Hospitality\*

Jobs	Economic activity	Worker productivity
Number of persons	Value added	Value added per worker
2,524	\$204m	\$80,962
-1.3%	-2.3%	-1.0%
South Australia -0.3%	South Australia -2.8%	South Australia -2.5%
p.a. growth 2016 - 2021	p.a. growth 2016 - 2021	p.a. growth 2016 - 2021

### Tourism and Hospitality\* industries

Employment, 2021

Food and beverage services	2,490
Food retailing	2,199
Accommodation	232
Heritage activities	21

### Recent performance

Specialisation (LQ)	5 yr change
Food and beverage services	-29%
Food retailing	-33%
Accommodation	-3%
Heritage activities	1%

### Key drivers

- Discretionary income
- International tourism
- Domestic tourism
- Exchange rate

\* Preliminary value

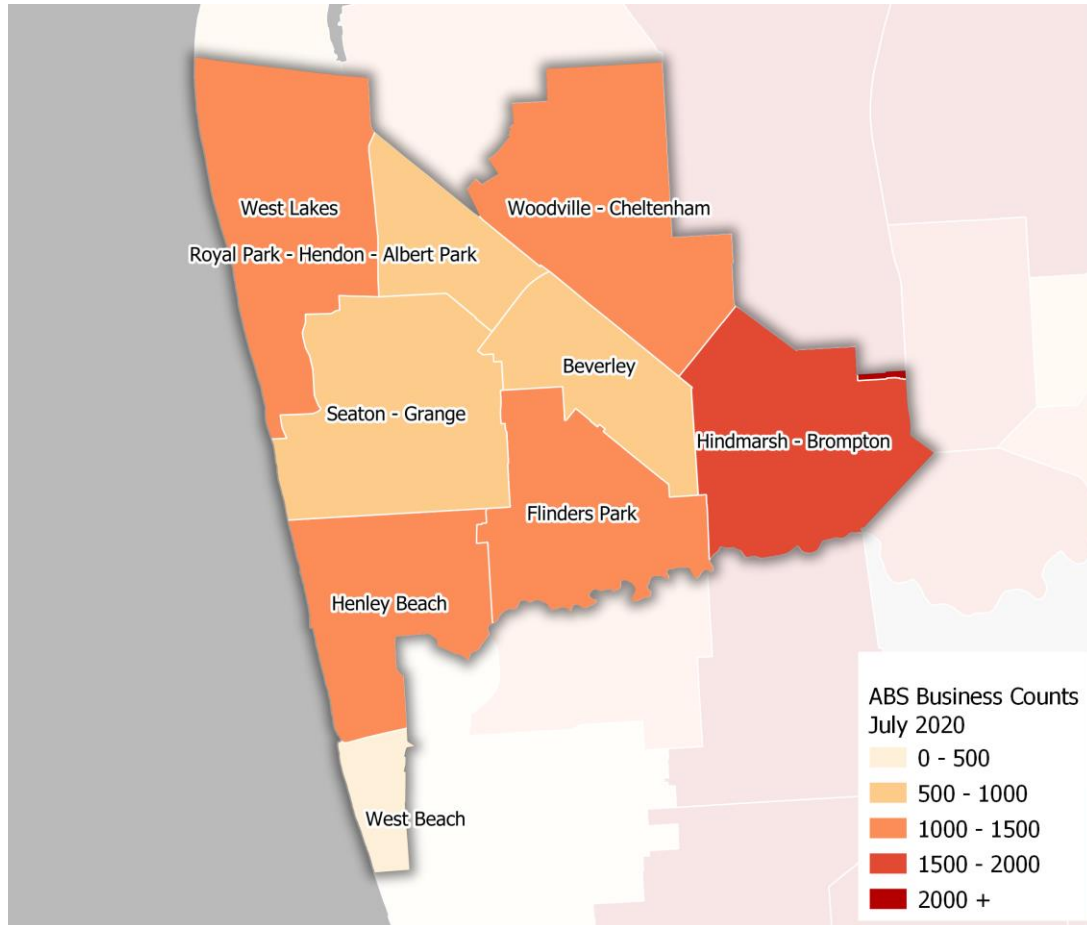
# 07 How does the spatial economy operate?

## Spatial patterns - Business numbers

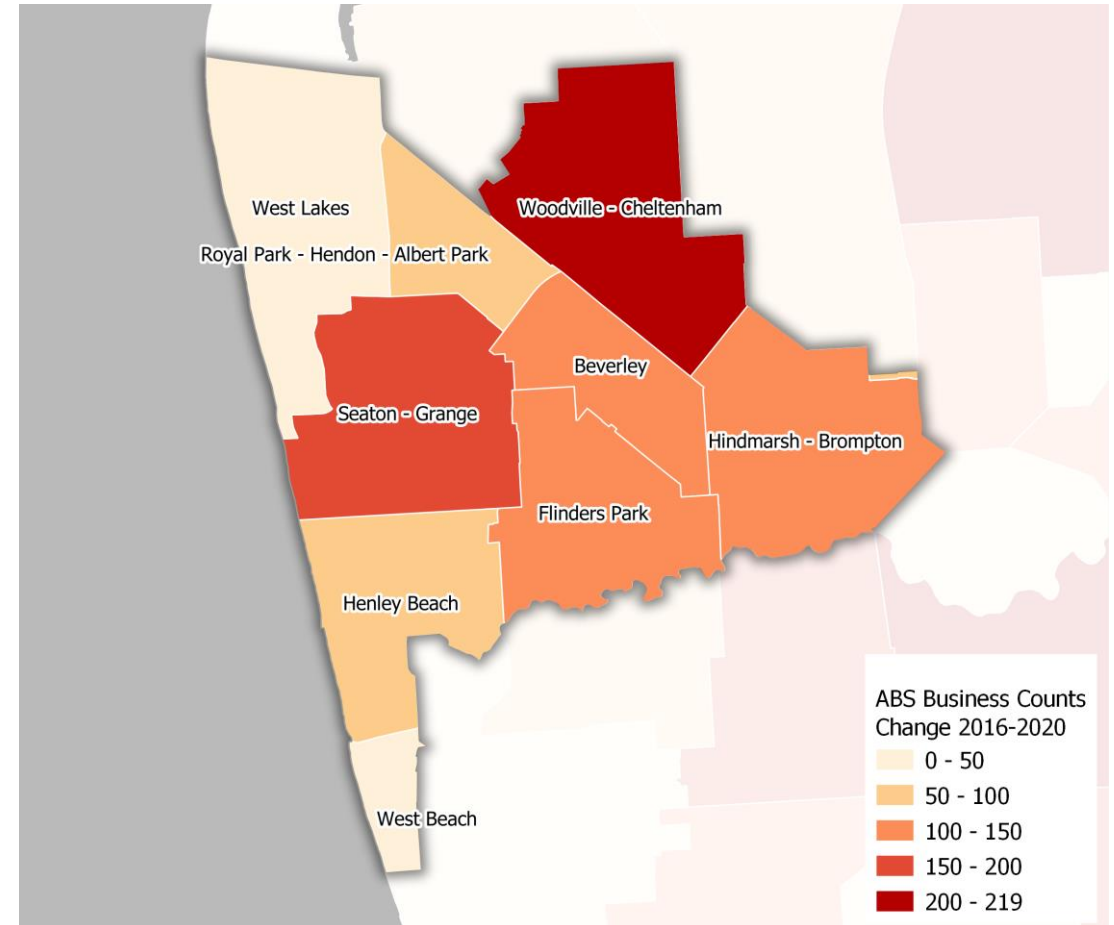
The two locations with the most amount of GST registered businesses in 2020 were Hindmarsh - Brompton (1,862) and Woodville - Cheltenham (1,427).

The two locations with the largest change in business numbers between June 2016 and 2020 were Woodville – Cheltenham (+219 businesses) and Seaton - Grange (+175 businesses).

Number of registered business numbers, June 2020



Change in registered business numbers, June 2016 to June 2020

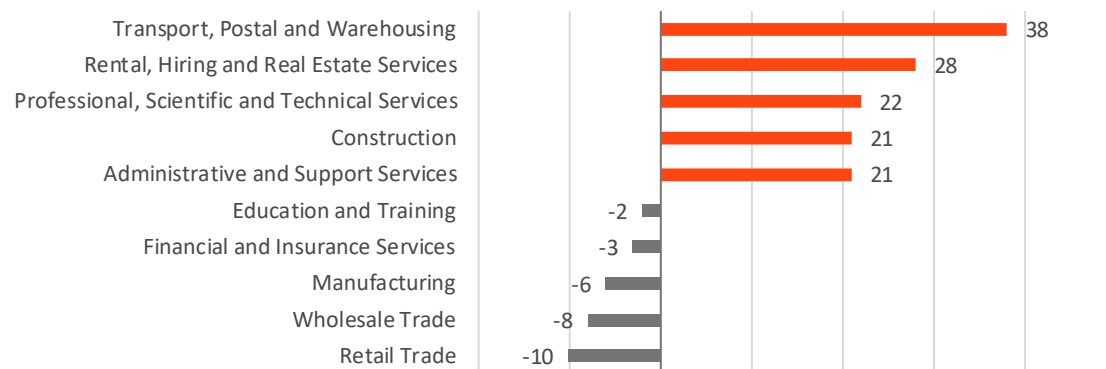


Growth in business numbers in Hindmarsh - Brompton was driven by Transport, Postal and Warehousing, Rental, Hiring and Real Estate Services, Professional Services and Construction over the period from 2016 to 2020.

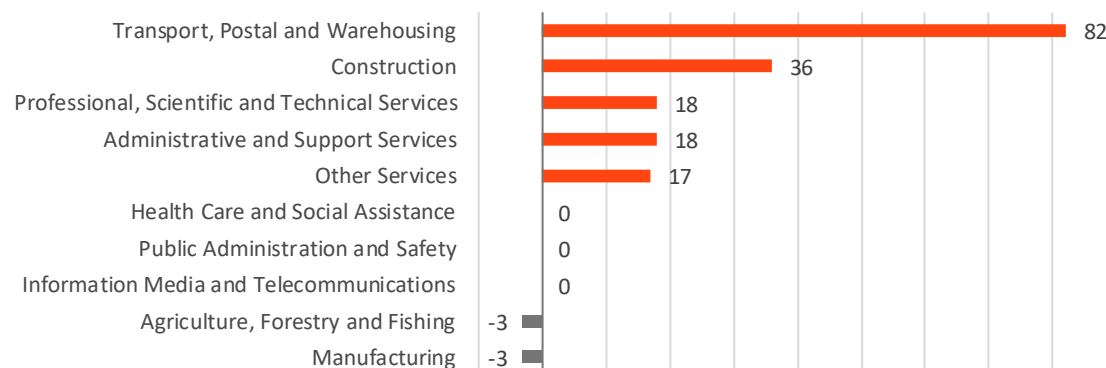
Increase in Transport, Postal and Warehousing sector businesses were significantly higher than the other sectors in Woodville - Cheltenham. However, majority of these businesses were Taxis and Uber drive/delivery services.

## Change in business numbers - 2016 to 2020

### Hindmarsh - Brompton



### Woodville - Cheltenham



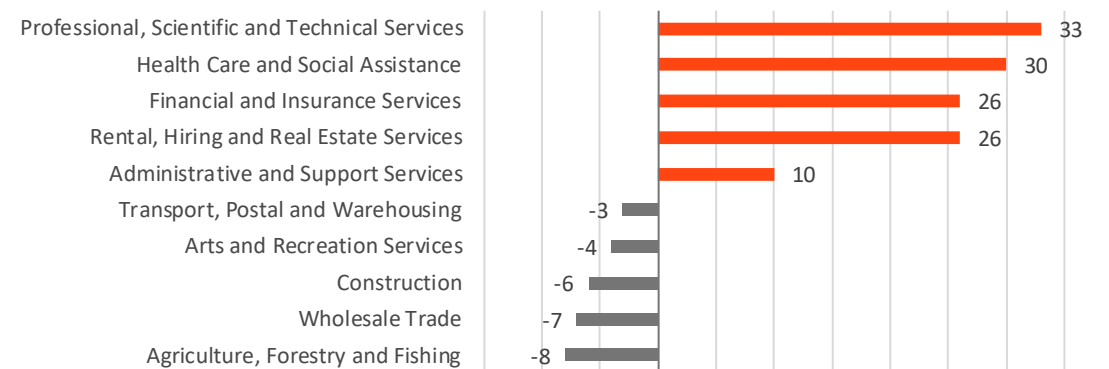
Source: ABS, 2020, Cat: 8165.0 - Counts of Australian Businesses, including Entries and Exits

Henley Beach experienced a strong business number growth in Professional, Scientific and Technical Services, Health Care and Social Assistance, Finance and Insurance and Rental, Hiring and Real Estate Services.

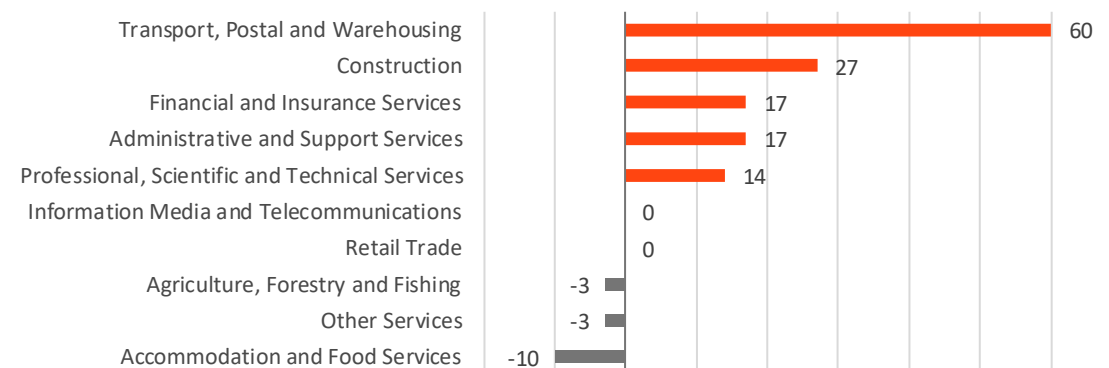
Transport, Postal and Warehousing businesses increased significantly higher than other businesses in Flinders Park. Similar to Woodville - Cheltenham, majority of these businesses were Taxis and Uber services.

## Change in business numbers - 2016 to 2020

### Henley Beach



### Flinders Park

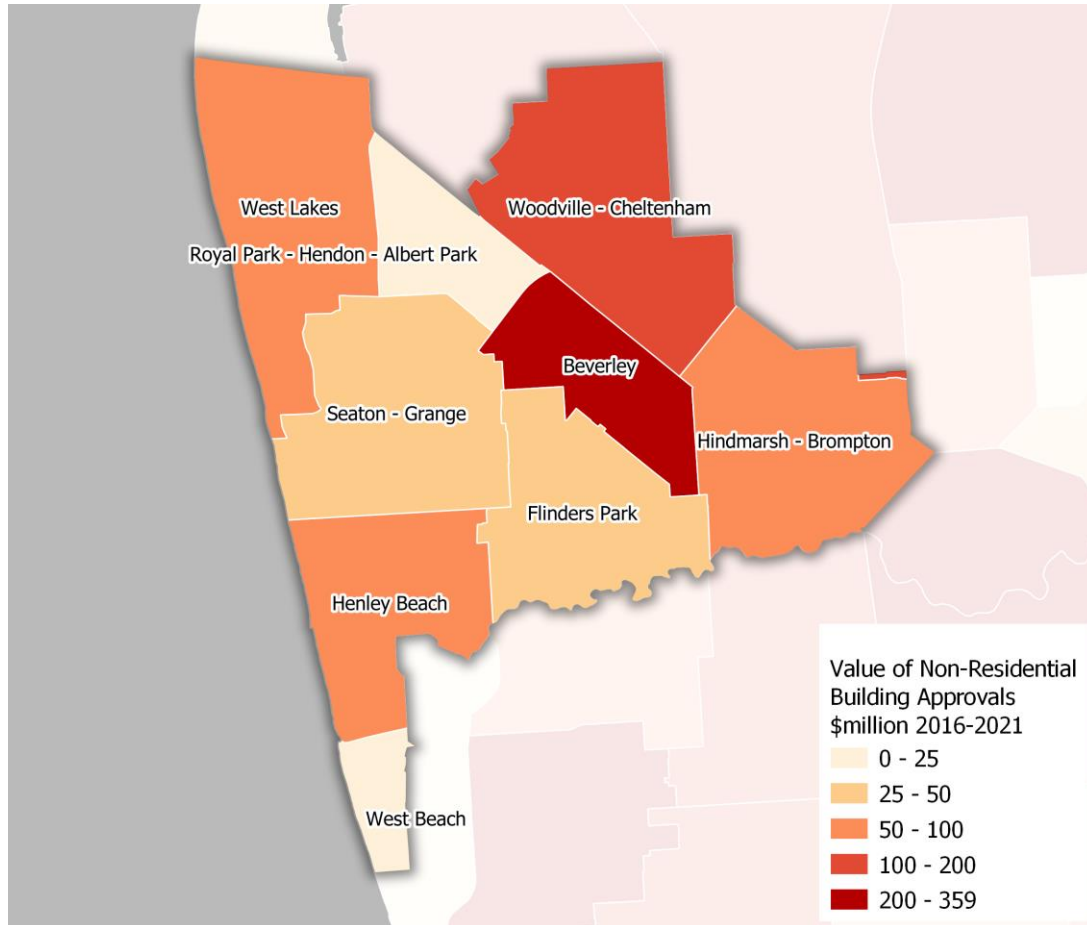


Source: ABS, 2020, Cat: 8165.0 - Counts of Australian Businesses, including Entries and Exits

## Spatial patterns - Building approvals

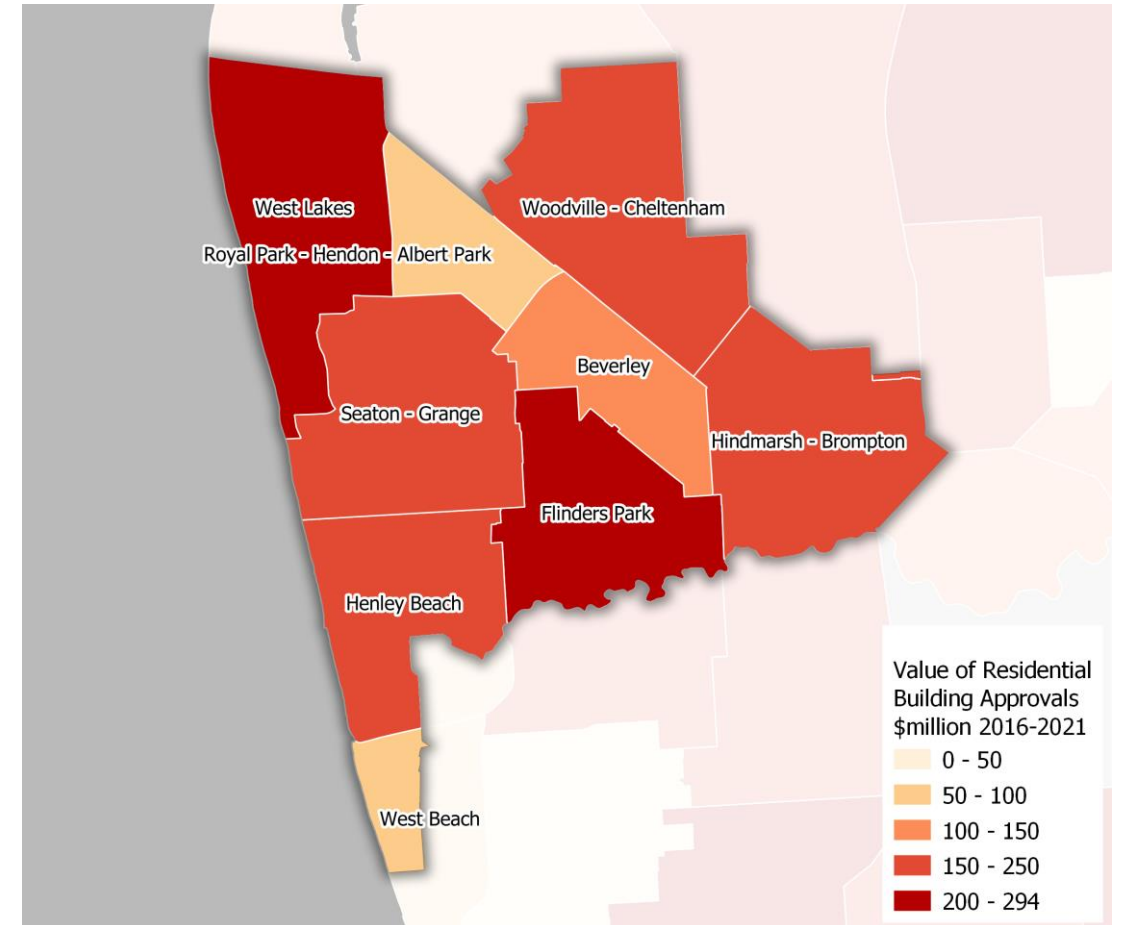
The area with the largest value of non-residential building approvals from 2016 to 2021 was Beverley (\$359M) driven by the Queen Elizabeth Hospital redevelopment project, followed by Woodville - Cheltenham (\$131M).

Non-residential building approvals value (\$M), July 2016 to June 2021



The area with the largest value of residential building approvals from 2016 to 2021 was Flinders Park (\$294M), followed by West Lakes (\$288M).

Residential building approvals value (\$M), July 2016 to June 2021





**Hindmarsh – Brompton maintains its industrial background but Bowden is now the site of the medium density TOD redevelopment. Woodville – Cheltenham has a mixture of residential, commercial and industrial characteristics.**

As with any large region, specific locations within Charles Sturt perform different economic roles. The two largest job locations within the LGA are Hindmarsh - Brompton and Woodville - Cheltenham.

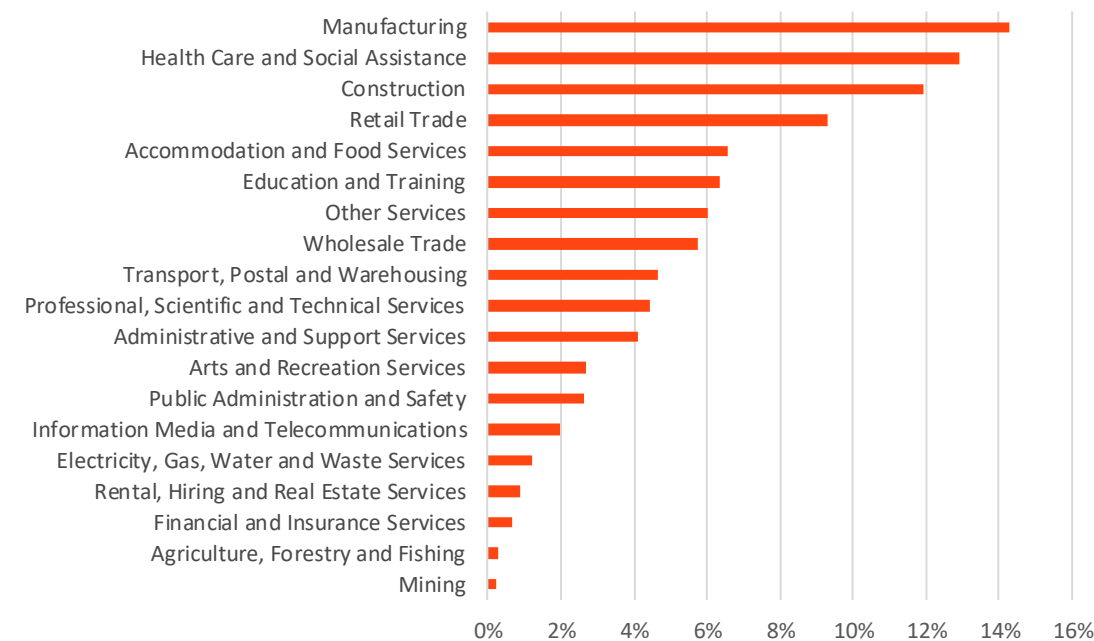
Hindmarsh - Brompton accounts for 24% (9,635 jobs) of Charles Sturt's total local jobs and Woodville - Cheltenham accounts for 19% (7,655 jobs) of Charles Sturt's total local jobs.

Hindmarsh - Brompton supports a range of commercial and industrial jobs. The top three industries in the location is Manufacturing (1,373 jobs), Health Care and Social Assistance (1,244 jobs) and Construction (1,144 jobs).

Woodville - Cheltenham has a high share of Manufacturing (1,307 jobs), Health Care and Social Assistance (1,238 jobs) and Retail Trade (1,222 jobs) jobs.

**Share of local jobs - Hindmarsh - Brompton**

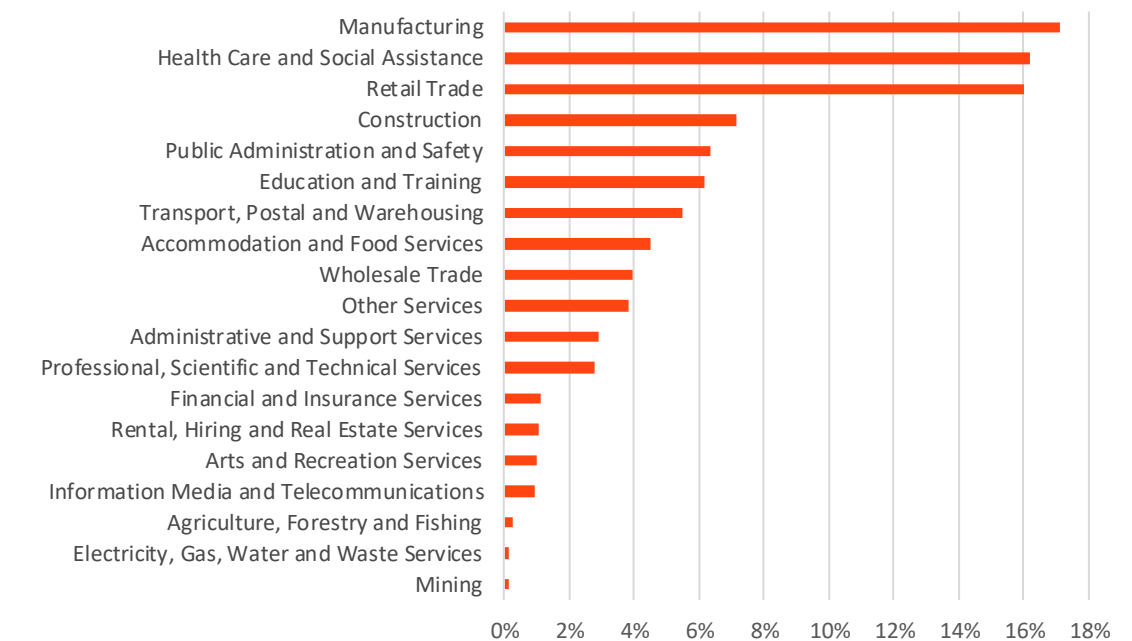
% of total jobs in the location



Source: ABS Census of Population and Housing, 2016

**Share of local jobs - Woodville - Cheltenham**

% of total jobs in the location



Source: ABS Census of Population and Housing, 2016

# Health Care activities dominate Beverley; Flinders Park is a largely residential area and has a large population serving sector jobs

The next two largest locations within the LGA are Beverley and Flinders Park.

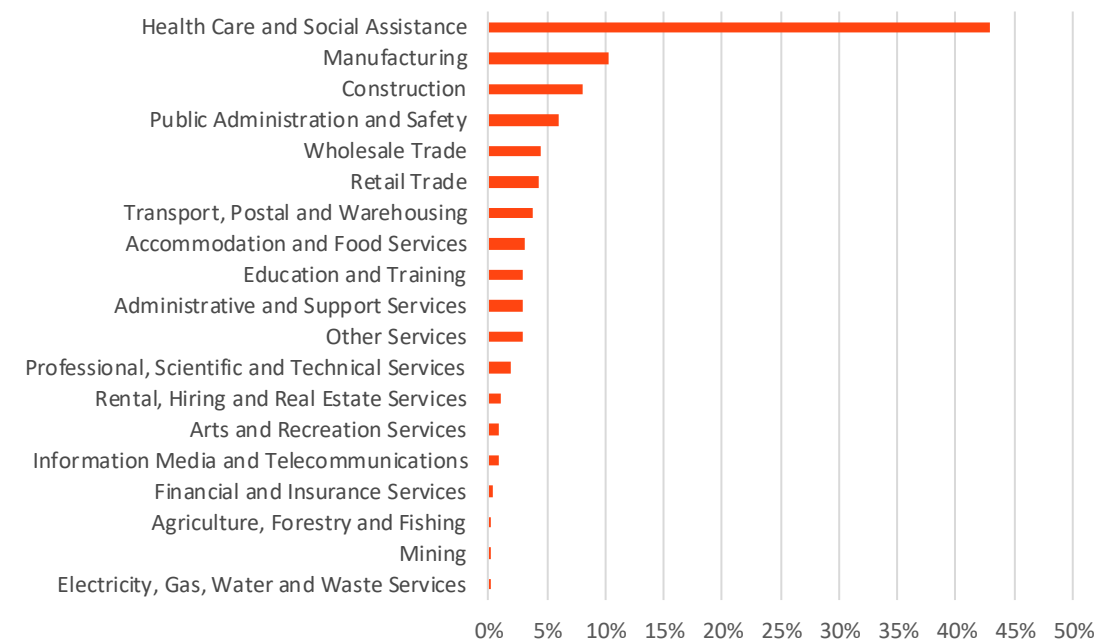
Beverley accounts for 16% (6,231 jobs) of Charles Sturt's total local jobs and Flinders Park accounts for 11% (4,290 jobs) of Charles Sturt's total local jobs.

Jobs in Beverley is dominated by The Queen Elizabeth Hospital. The top three industries in the location is Health Care and Social Assistance (2,673 jobs), Manufacturing (633 jobs) and Construction (501 jobs).

A large share of jobs Flinders Park is in population serving sectors. The top three industries in the location is Retail Trade (599 jobs), Education and Training (578 jobs) and Health Care and Social Assistance (535 jobs).

## Share of local jobs - Beverley

% of total jobs in the location



Source: ABS Census of Population and Housing, 2016

## Share of local jobs - Flinders Park

% of total jobs in the location



Source: ABS Census of Population and Housing, 2016

# 08 What do the demography and Socio-economics look like?

## Charles Sturt is characterised generally by more multi-cultural, average educated, slightly older residents and lone person households than the Greater Adelaide average

The residents in Charles Sturt are relatively older with a median age of 41 years, compared to 39 years of age for Greater Adelaide. The resident's median age remain unchanged from Census 2011 to Census 2016.













In 2016, the households in Charles Sturt made \$1,228 median weekly income, \$210 more than the median weekly household income in 2011. The household income was relatively lower than the median Greater Adelaide weekly household income of \$1,261 in 2016.

The share of overseas born residents was similar to the Greater Adelaide as a whole at 27.5% in 2016, where the level has increased by +0.2% since 2011.

Around 20.3% of the residents had a university qualification compared to 21.2% in the Greater Adelaide as a whole. However, the qualification level has increased since 2011 by 3.9%. In 2016, the proportion of residents with a trade qualification was 18.4% in Charles Sturt, lower than the Greater Adelaide as a whole.

The labour force participation rate in Charles Sturt was 59.0% in 2016, similar to Greater Adelaide as a whole. The participation rate has increased since 2011 by 0.8%.

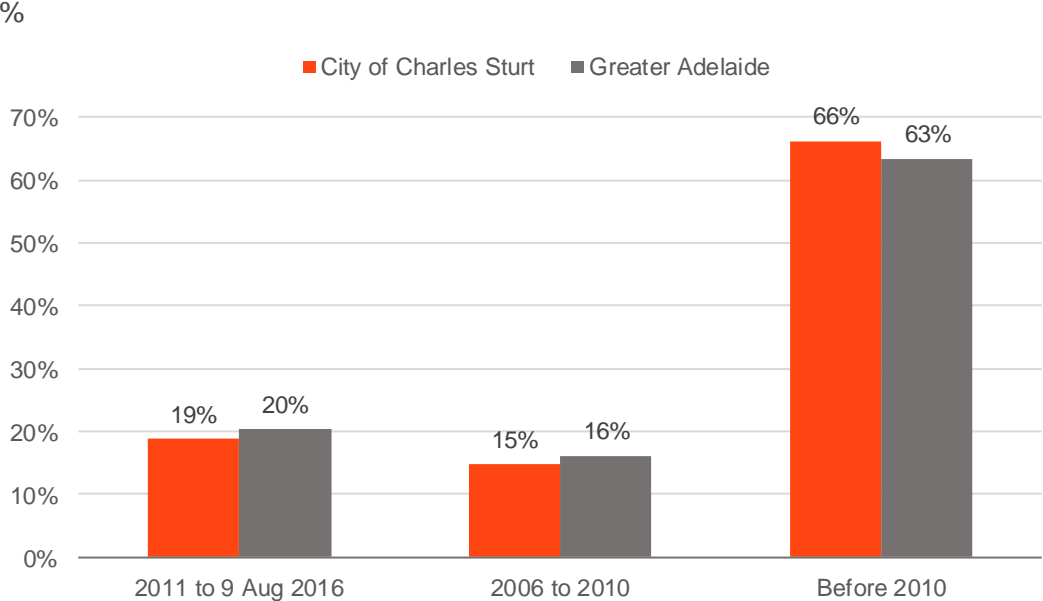
## Charles Sturt demographic and socio-economic profile in 2016

Headline figures (Greater Adelaide)			Change from 2011 to 2016	
	Median age	<b>41</b> (39)		<b>0</b> no change
	Median weekly household	<b>\$1,228</b> (\$1,261)		<b>+\$210</b> per week
	Overseas born	<b>27.5%</b> (26.3%)		<b>+0.2%</b> percent
	University qualification	<b>20.3%</b> (21.2%)		<b>+3.9%</b> percent
	Trade qualification (certificate)	<b>18.4%</b> (19.3%)		<b>+1.0%</b> percent
	Labour force participation rate	<b>59.0%</b> (59.5%)		<b>+0.8%</b> percent

# Culturally diverse

Charles Sturt has a relatively high level of diversity. In 2016, 29% of the residents spoke a non-English language at home, significantly higher than the Greater Adelaide average of 21%. The city has a rich mixture of various ethnic backgrounds with a higher number of residents with Italian, Greek and Vietnamese languages spoken at home than Greater Adelaide. A higher number of international immigrants arrived before 2010 compared to the Greater Adelaide average.

## Overseas born year of arrivals - Charles Sturt



Source: ABS Census, 2016

## Non-English language spoken at home

	City of Charles Sturt	Greater Adelaide
Italian	4.9%	2.1%
Greek	4.1%	1.7%
Vietnamese	2.7%	1.4%
Mandarin	1.4%	2.1%
Serbian	1.2%	0.3%
Punjabi	0.9%	0.7%
Arabic	0.8%	0.7%
Cantonese	0.7%	0.7%
Polish	0.6%	0.4%
Filipino/Tagalog	0.6%	0.6%
Croatian	0.6%	0.2%
Malayalam	0.5%	0.3%
Hindi	0.5%	0.5%
Other	80.5%	88.3%

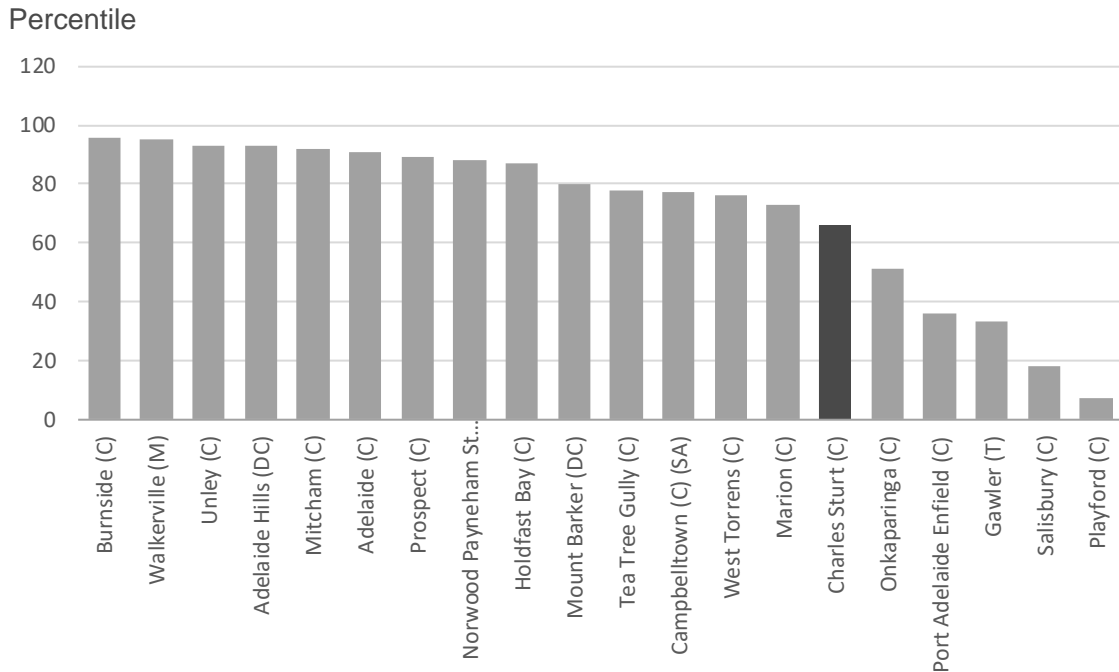
Source: ABS Census 2016

# Charles Sturt has a high level of socio-economic disadvantage compared to Greater Adelaide and surrounding Metro LGAs. This contributes to a relatively lower household income.

Charles Sturt has a relatively high socio-economic disadvantage. In 2016, Charles Sturt had SEIFA advantage and disadvantage index percentile of 66, lower than surrounding metro LGA average (71). That is, Charles Sturt is relatively more disadvantaged than surrounding metro LGAs on average. In the same year, Charles Sturt ranked 15th out of metro LGAs around Charles Sturt in terms of the SEIFA index.

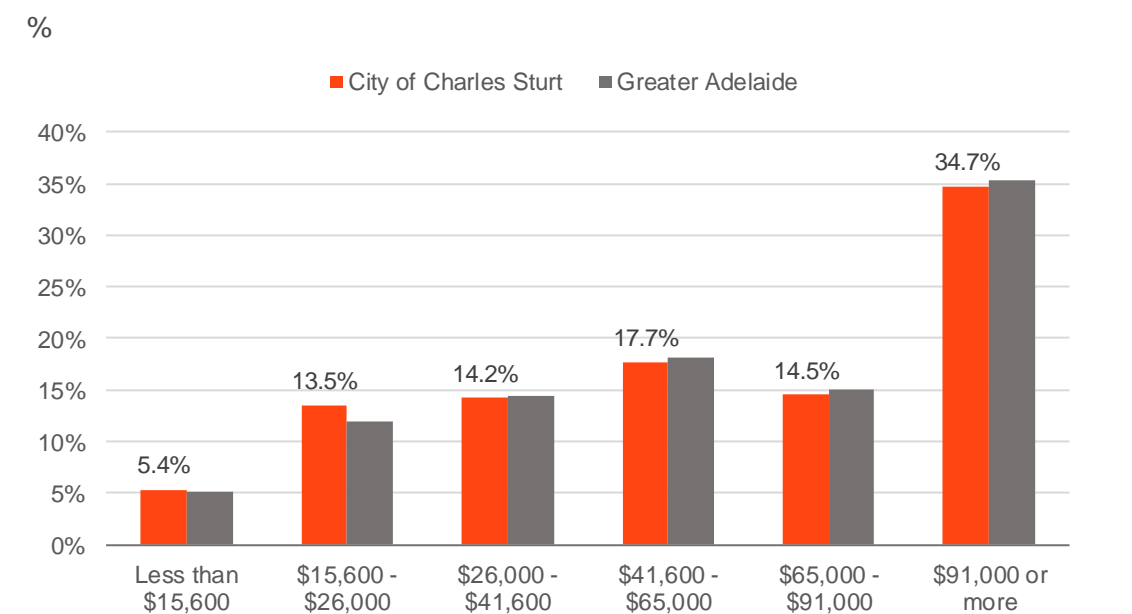
The below average socio-economic conditions all contribute to a relatively lower household income in Charles Sturt. Charles Sturt has a relatively higher share of households in low income brackets (less than \$26,000 per year) and a lower share of households in higher income brackets (greater than \$41,600 per year) compared to Greater Adelaide as a whole.

## SEIFA relative socio-economic advantage and disadvantage



Source: ABS Census of Population and Housing, 2016

## Annual Household Income - Charles Sturt

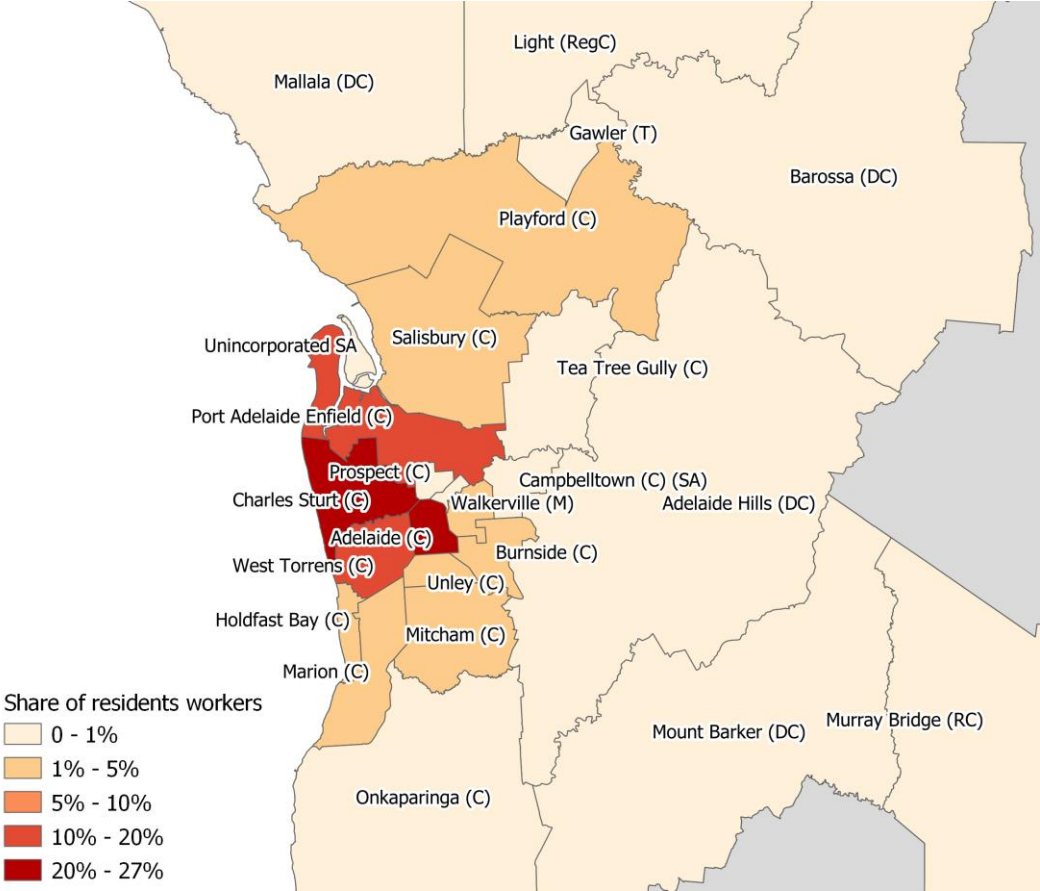


Source: ABS Census, 2016

# Large commuting population attracted to higher paying jobs

A jobs deficit obviously means that some residents are seeking employment outside the LGA. In 2016, 69% of residents travelled outside of Charles Sturt for work. Many commuters were working in nearby LGAs like Adelaide (21.9%), Port Adelaide Enfield (14.1%) and West Torrens (10.6%).

Employed residents place of work by LGA, ABS Census 2016

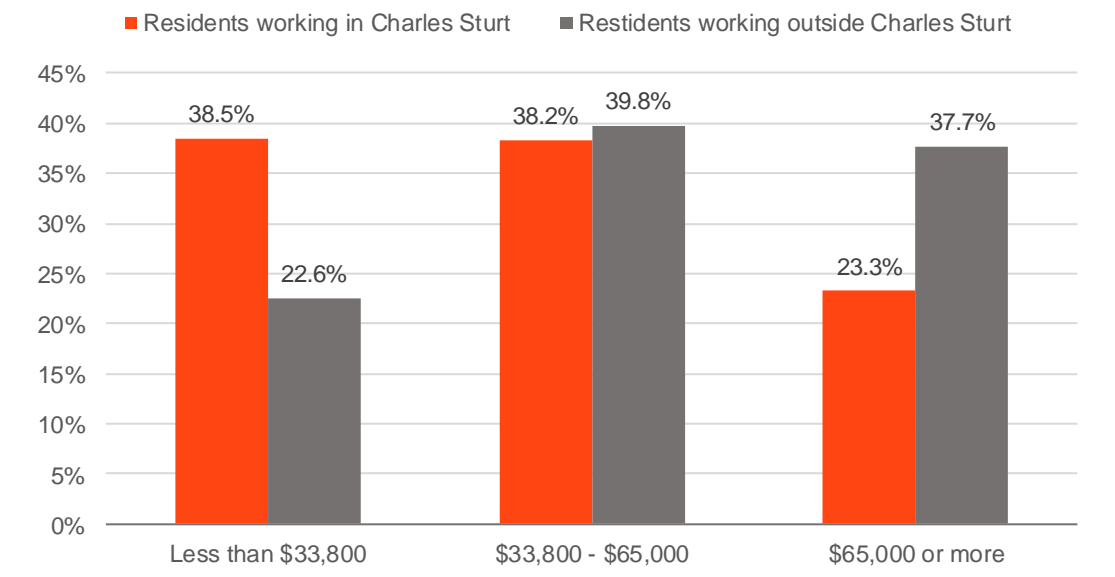


One of the obvious reasons for Charles Sturt residents to seek employment outside the LGA is that there is a chance to gain higher incomes. They are choosing to trade off longer commutes for higher wages, thus providing a real monetary benefit.

In 2016, 37.7% of the residents who left the LGA for work were earning \$65,000 or more per year, this compares to only 23.3% for those who worked locally.

## Commuting residents income profile - Charles Sturt

% Annual gross individual income level

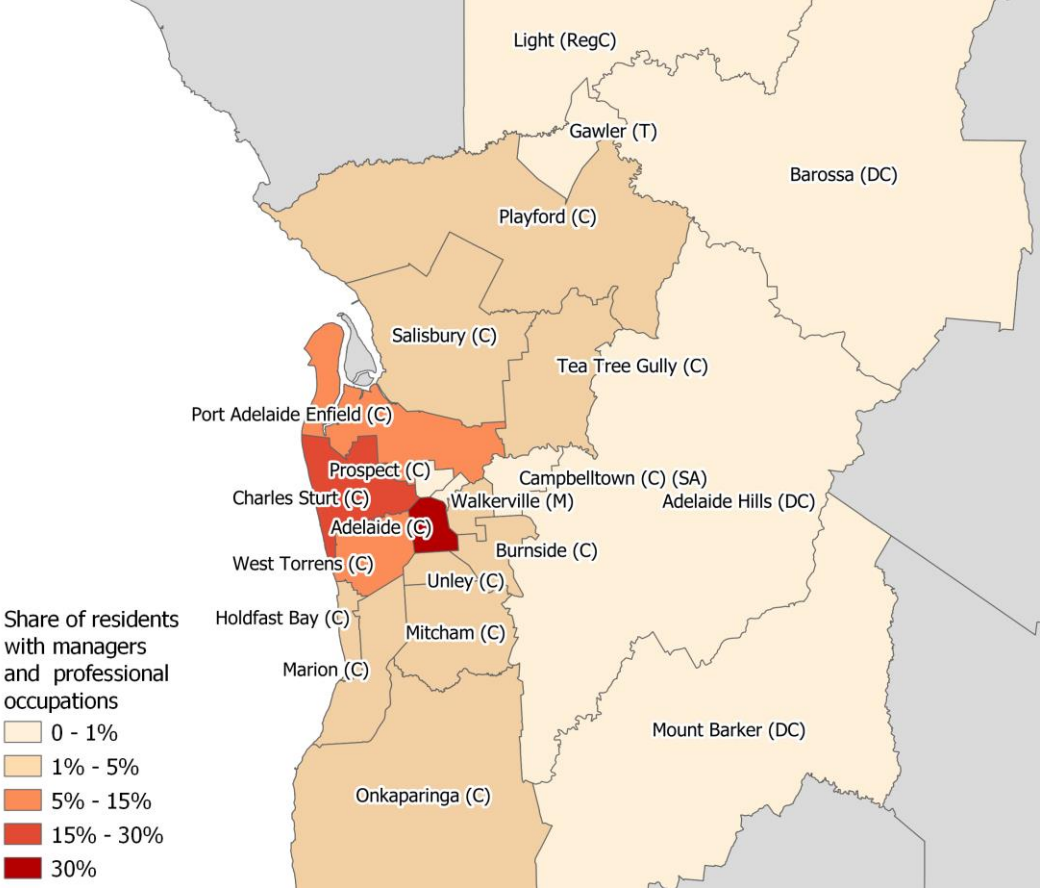


Source: ABS Census 2016

# Commuting residents attracted to high skilled occupations

Many residents working as a manager or professionals are working outside the LGA. In 2016, 77.4% of manager and professional occupation residents travelled outside of Charles Sturt for work. Around 30.0% of the residents with manager and professional occupations worked in the City of Adelaide, followed by Port Adelaide Enfield (11.5%), West Torrens (8.8%) and Salisbury (4.9%).

Manager and professional occupation employed residents place of work by LGA

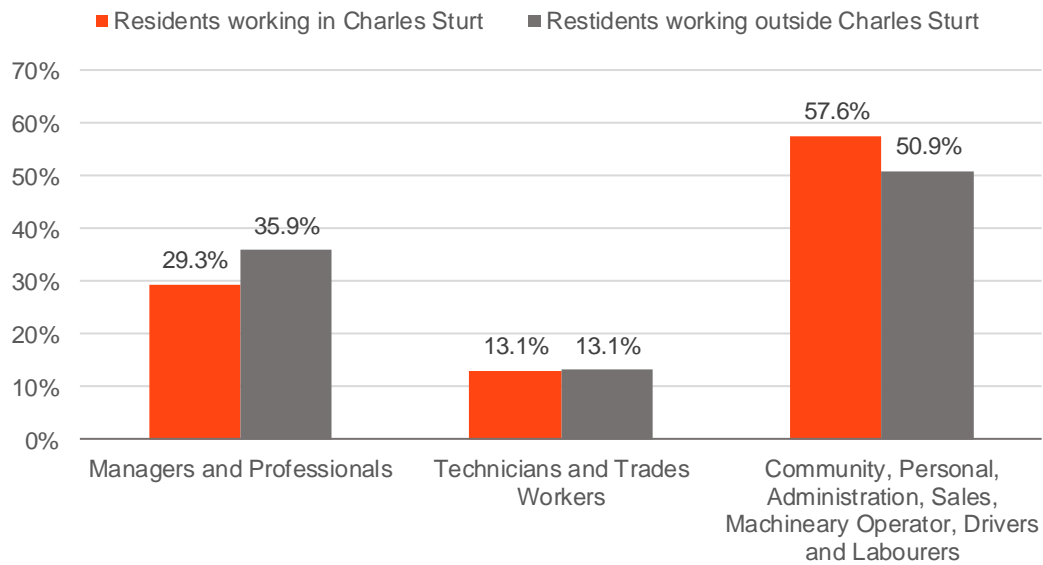


Residents who are commuting outside the LGA are more likely to be working in occupations that require a higher skill level and offer more full-time opportunities.

As illustrated in the chart below, residents with a manager and professional occupations are working outside Charles Sturt more than within in 2016. Conversely, residents with less skilled occupations (e.g. sales and labourers) are working inside Charles Sturt than outside.

## Commuting residents occupation profile - Charles Sturt

% , occupation



Source: ABS Census 2016



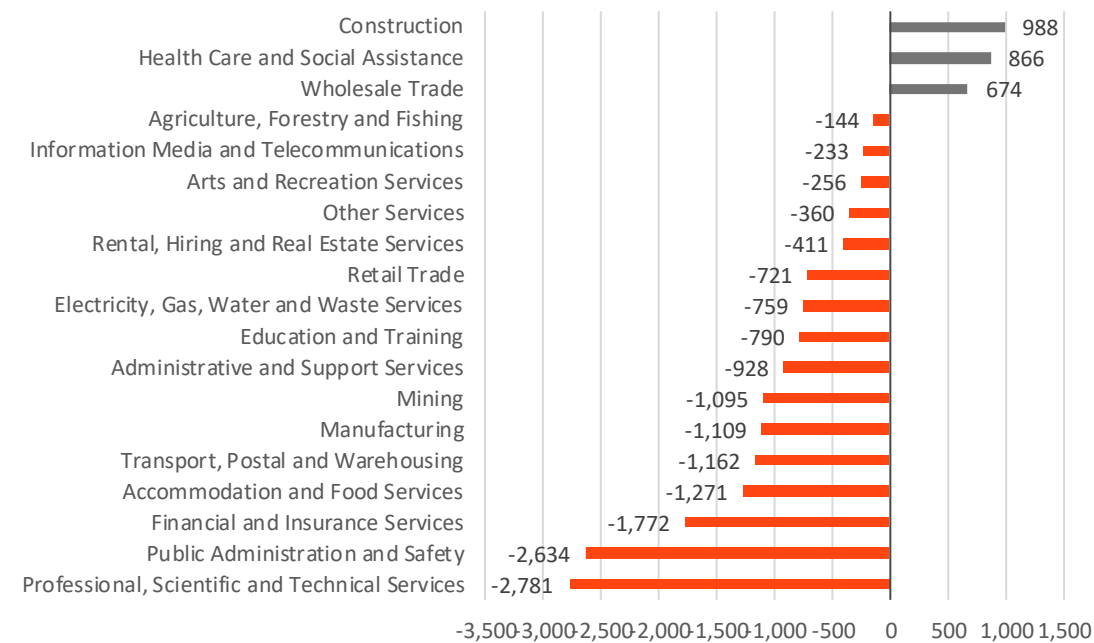
# Shortfall in local jobs across almost all industries. Large job deficits are in white collar sectors like Government, Business Services and Finance.

Looking at job deficits by industry allows us to explore which ones have the potential highest imbalances. In 2020/21, the top three industries with the highest job deficits are professional service industries, Professional Services, Public Administration and Safety and Finance and Insurance.

In terms of the detailed industry level, professional, scientific and technical services industries had the largest job deficit in 2020/21, closely followed by Public Administration.

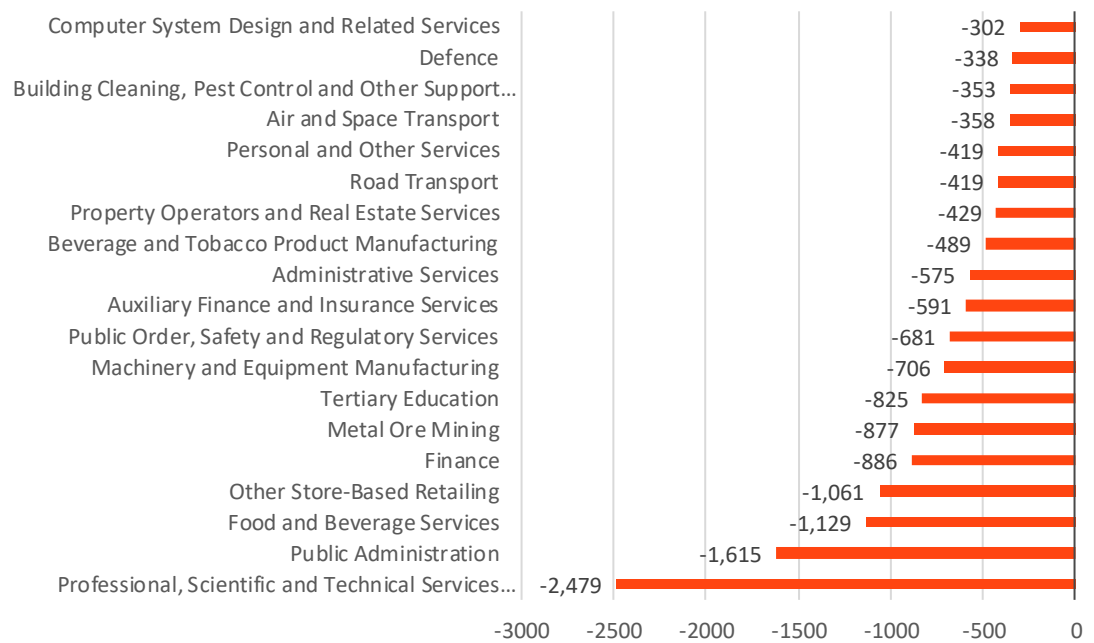
## Job deficit by industry - Charles Sturt, 2020/21

persons



## Job deficit by detailed industry - Charles Sturt, 2020/21

persons



Source: NIEIR, 2022

Source: NIEIR, 2022

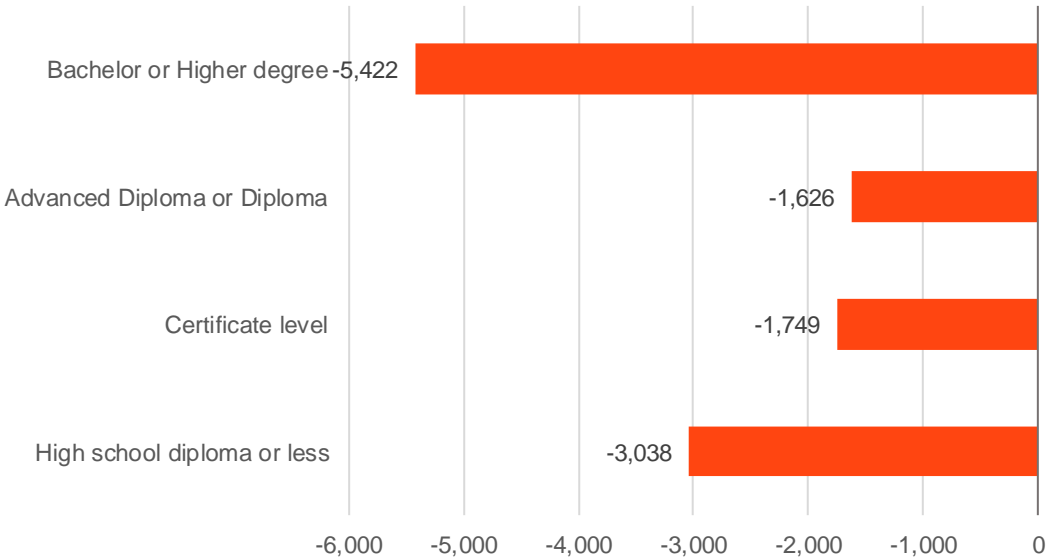
# Significant gap in the skills level between local jobs and employed residents

Job gaps appear in terms of the industry profile as well as skill levels. In 2016, there were an estimated 7,048 more employed residents with degree level qualifications than local workers. Also, there was a gap of 1,749 employed residents with certificate level qualifications and a gap of 3,038 employed residents with a high school diploma or less in 2016.

There is a large gap in the field of qualifications between local jobs and employed residents. In 2016, the biggest difference between the local jobs and employed residents field of qualifications was in management and commerce with a gap of 2,775 employed resident workers, followed by 1,353 employed residents in society and culture, and 1,162 employed residents in engineering and related technologies field of qualifications.

## Qualification deficit - Charles Sturt

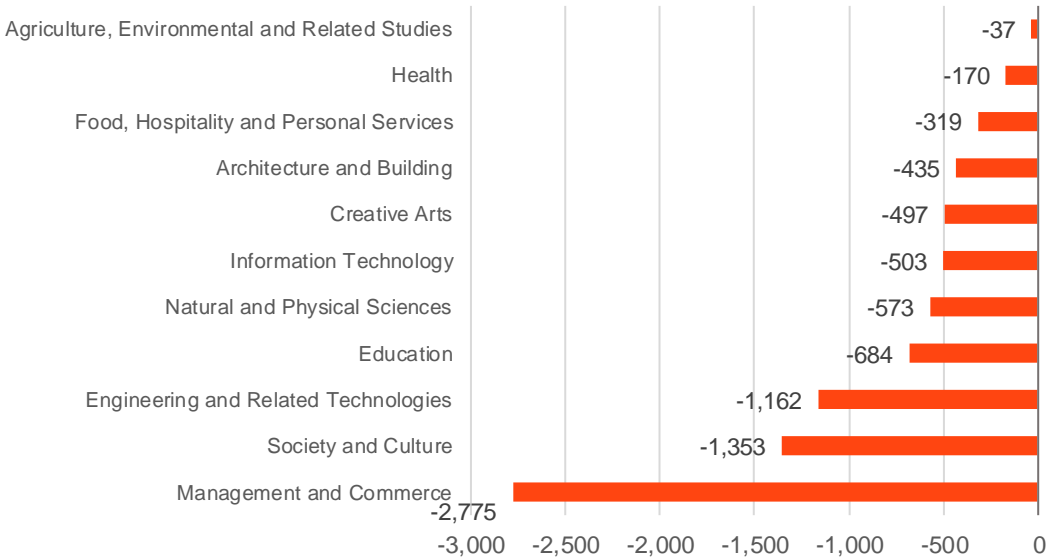
Difference between local jobs and employed residents qualifications



Source: ABS Census 2016

## Top field of qualification with deficit - Charles Sturt

Difference between local jobs and employed residents field of qualifications



Source: ABS Census 2016

## Large mismatch in occupations and field of qualifications

In 2016, there is a large gap of 5,318 employed residents in manager and professional occupations in Charles Sturt, followed by a gap of 3,047 employed residents in clerical and administrative occupations.

In terms of specific occupations, it appears key gaps are in general clerks, accountants, hospitality and finance workers. Similarly, the largest qualification gap was in Business and Management qualifications.

### Occupation deficit - Charles Sturt

Difference between local jobs and employed residents occupations



Source: ABS Census 2016

## Top occupation and qualification fields with job deficits

Occupation	Deficit	Qualification field	Deficit
General Clerks	-453	Business and Management	-1187
Accountants, Auditors and Company Secretaries	-445	Teacher Education	-553
Hospitality Workers	-444	Accounting	-533
Financial and Insurance Clerks	-444	Law	-367
Call or Contact Centre Information Clerks	-392	Banking, Finance and Related Fields	-360
Defence Force Members, Fire Fighters and Police	-384	Engineering and Related Technologies, nfd	-325
Information and Organisation Professionals	-366	Information Technology, nfd	-324
Miscellaneous Clerical and Administrative Workers	-351	Sales and Marketing	-306
Contract, Program and Project Administrators	-347	Electrical and Electronic Engineering and Technology	-302
Cleaners and Laundry Workers	-344	Building	-261
School Teachers	-313	Personal Services	-241
Business and Systems Analysts, and Programmers	-298	Justice and Law Enforcement	-212
Business Administration Managers	-293	Natural and Physical Sciences, nfd	-210
Accounting Clerks and Bookkeepers	-291	Management and Commerce, nfd	-203
Sales Assistants and Salespersons	-291	Inadequately described	-202

Source: ABS Census 2016

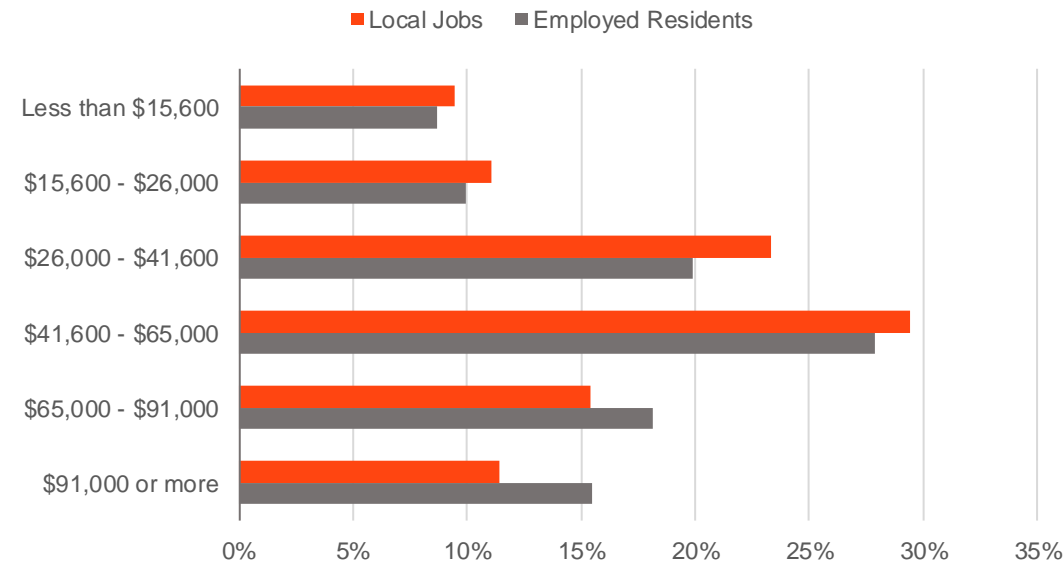
# Local jobs not meeting residents' needs.

Employed residents in Charles Sturt are earning higher incomes than workers in local jobs. In 2016, more employed residents were in income brackets greater than \$65,000 per year than local jobs in Charles Sturt. Conversely, more local jobs were in income brackets less than \$65,000 per year than employed residents in 2016.

Workers in local jobs are working less hours on average than employed residents in Charles Sturt. This is likely due to a higher share of full-time jobs held by the residents. In 2016, 60% of the employed residents were working in a full-time job compared to 57% full-time workers in local jobs.

## Individual income profile - Charles Sturt

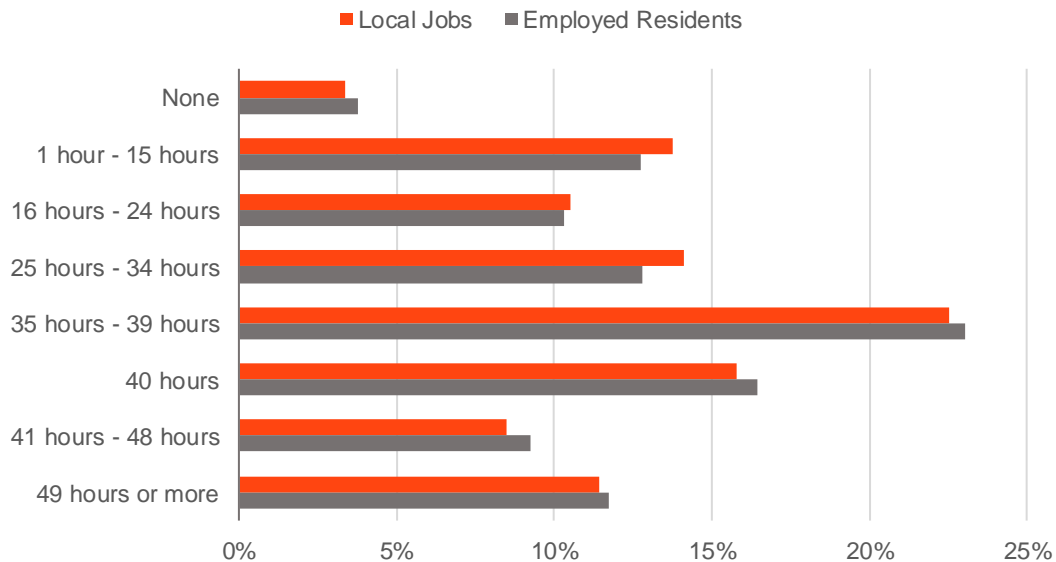
%, Annual gross individual income level



Source: ABS Census 2016

## Hours worked - Charles Sturt

%, Share of weekly hours worked



Source: ABS Census 2016

# 09 What is the economic outlook?

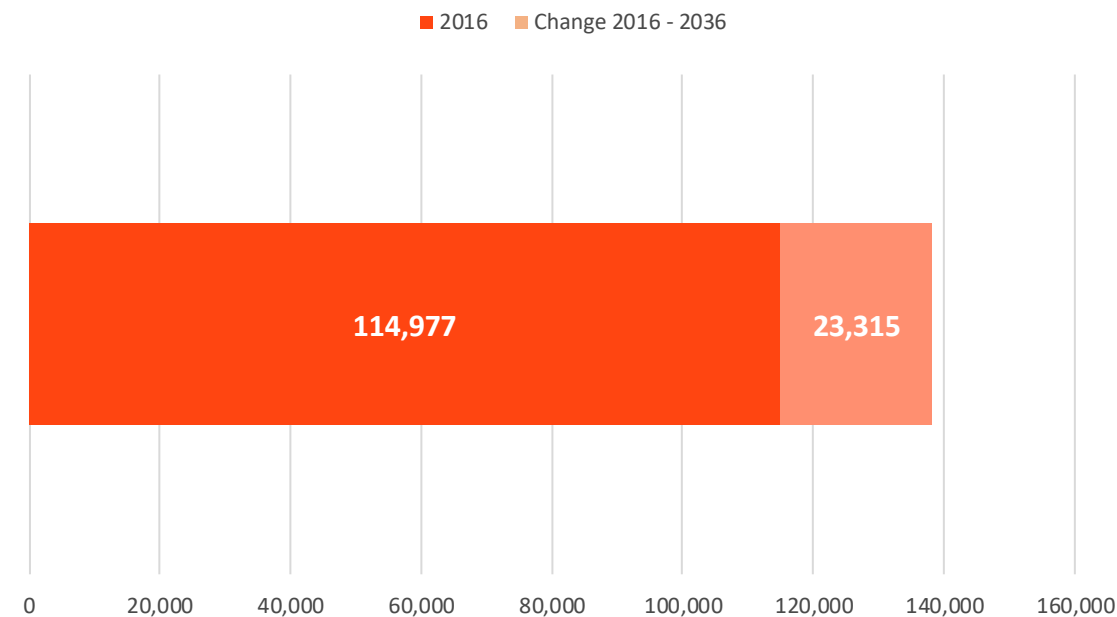
**Future population growth is expected to be driven by seniors and the elderly. This is likely to drive demand for health, aged care and related services.**

From 2016 to 2036, the population of Charles Sturt is expected to grow by 0.9% per annum. As at 2036, the population of Charles Sturt is expected to reach 138,292, growth of 23,315 people from 2016.

During the same period, the population in 75 and over and 35 to 44 age groups is forecast to have the largest increase with 7,288 and 4,166 people respectively. Conversely, the population in 15 to 24 and 55 to 64 age groups is forecast to have the smallest growth in population with 328 and 1,048 people respectively.

**Population forecast - Charles Sturt**

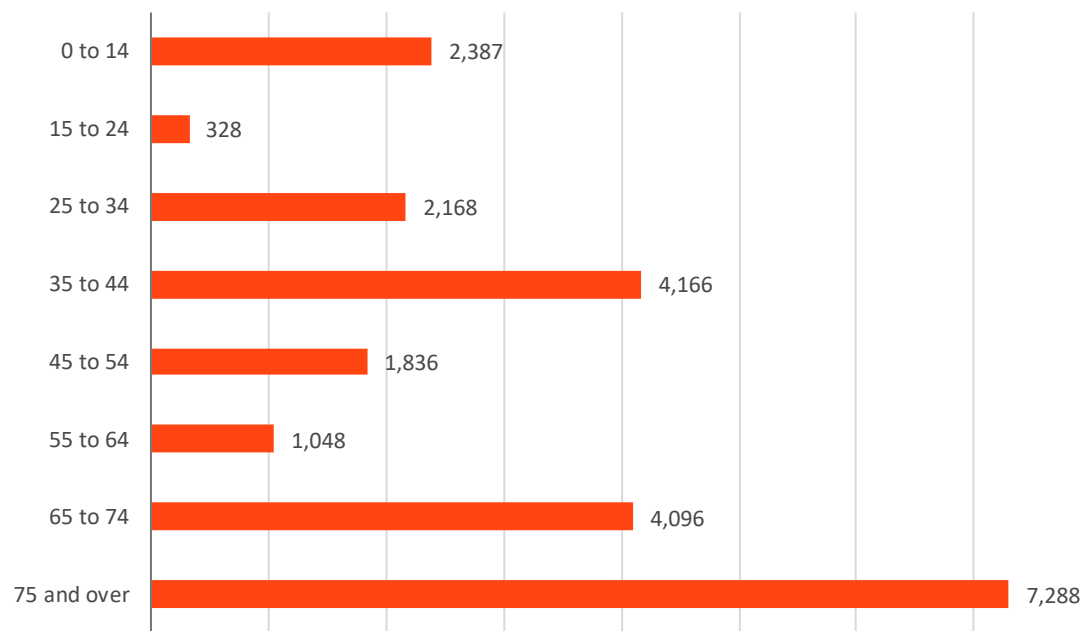
Person



Source: PlanSA (2020)

**Change in population by service age groups - 2016 - 2036**

Person



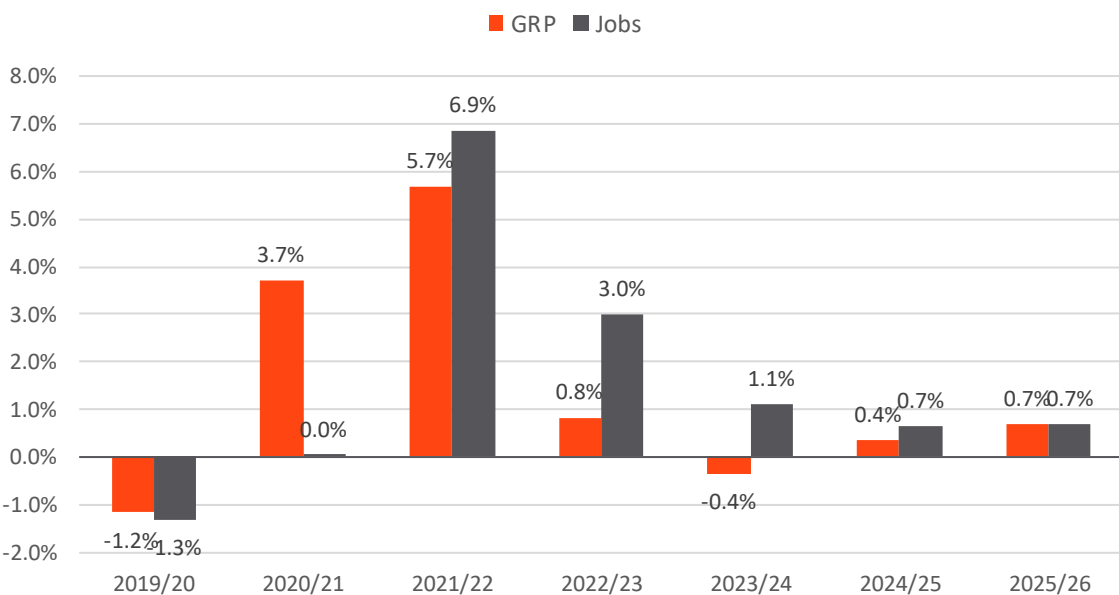
Source: PlanSA (2020)

# GRP and jobs forecast to stage a strong growth in 2021/22. Subsequent growth is forecast to be steady but lower.

Charles Sturt's GRP and Jobs are estimated to fall by, respectively, 1.2% and 1.3% in 2019/20. But GRP and Jobs are forecast to rebound from 2020/21. In 2021/22, annual GRP and jobs growth is forecast to be strong with the rates forecast to grow at 5.7% and 6.9% respectively. Subsequently, the growth rates are forecast to slow down, reaching 0.7% in 2025/06. By 2025/06, the forecast is \$6,472 Million in GRPs (+441 million compared to 2020/21) and 52,720 Jobs (5,976 jobs).

## Economic and Job Recovery Forecast - Charles Sturt

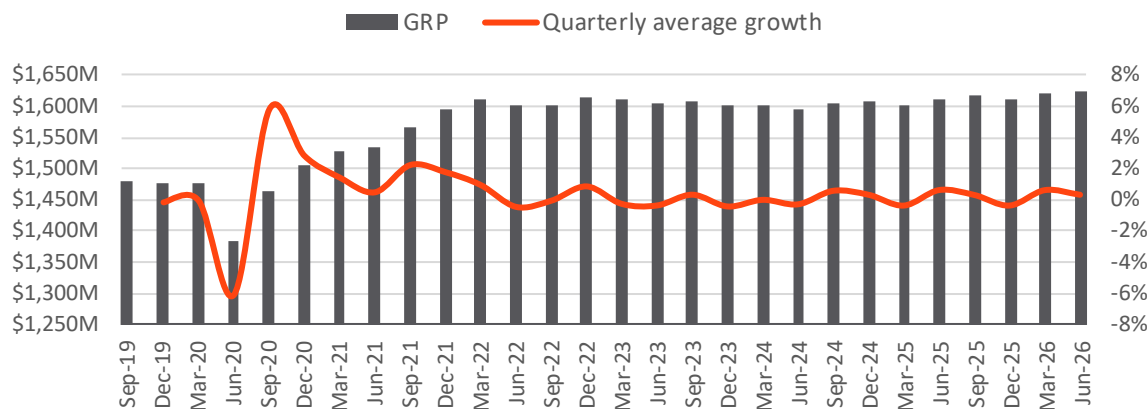
Annual % Change



Source: NIEIR, 2021; adjusted to 2022

## GRP Forecast, Quarterly - Charles Sturt

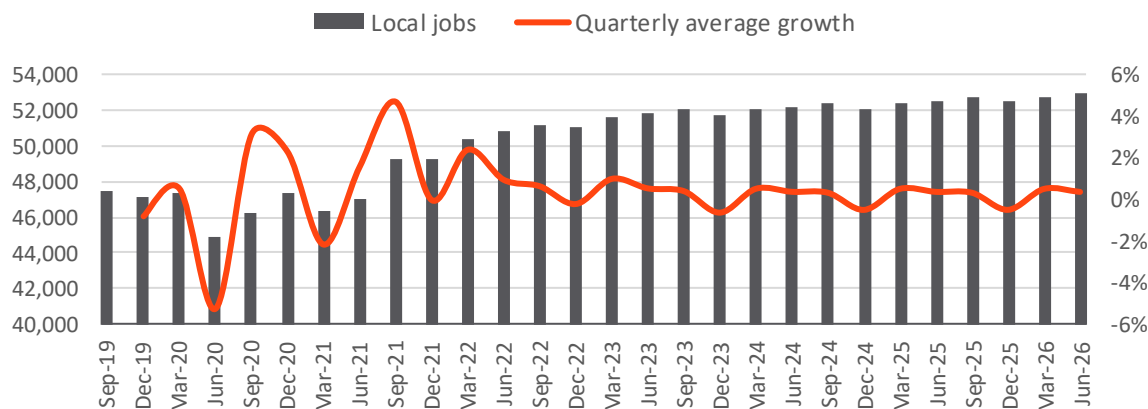
\$M (left axis), Quarterly % Change (right axis)



Source: NIEIR, 2021; adjusted to 2022

## Local Jobs Forecast, Quarterly - Charles Sturt

Jobs (left axis), Quarterly % Change (right axis)



Source: NIEIR, 2021; adjusted to 2022

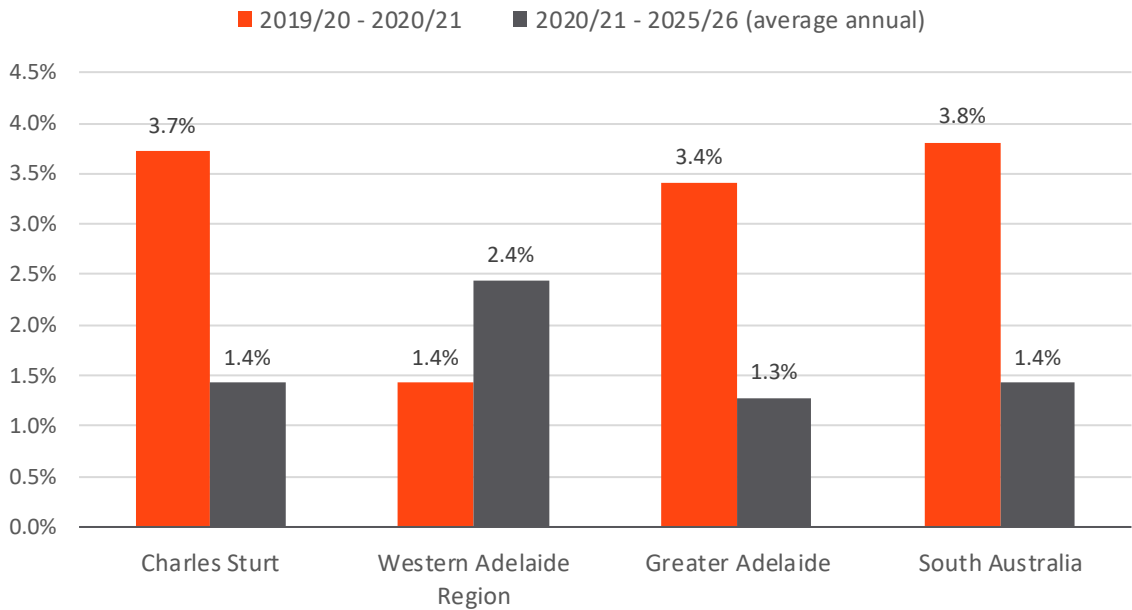
# Strong jobs growth forecast higher than other benchmarks

GRP is forecast to grow by 1.4% p.a. between 2020/21 and 2025/26. This is lower than the growth rate of 3.7% p.a. during the COVID-19 period. This rate is similar to the Greater Adelaide and South Australia average.

Local Jobs is forecast to grow by 2.4% p.a. over the period from 2020/21 to 2025/26. This is significantly higher than during the COVID-19 period growth rate of 0.04% p.a. (between 2019/20 to 2020/21). The rate is higher than the metro Adelaide (2.0% p.a.) and the state (2.2% p.a.) average growth rate.

## GRP Forecast - Charles Sturt

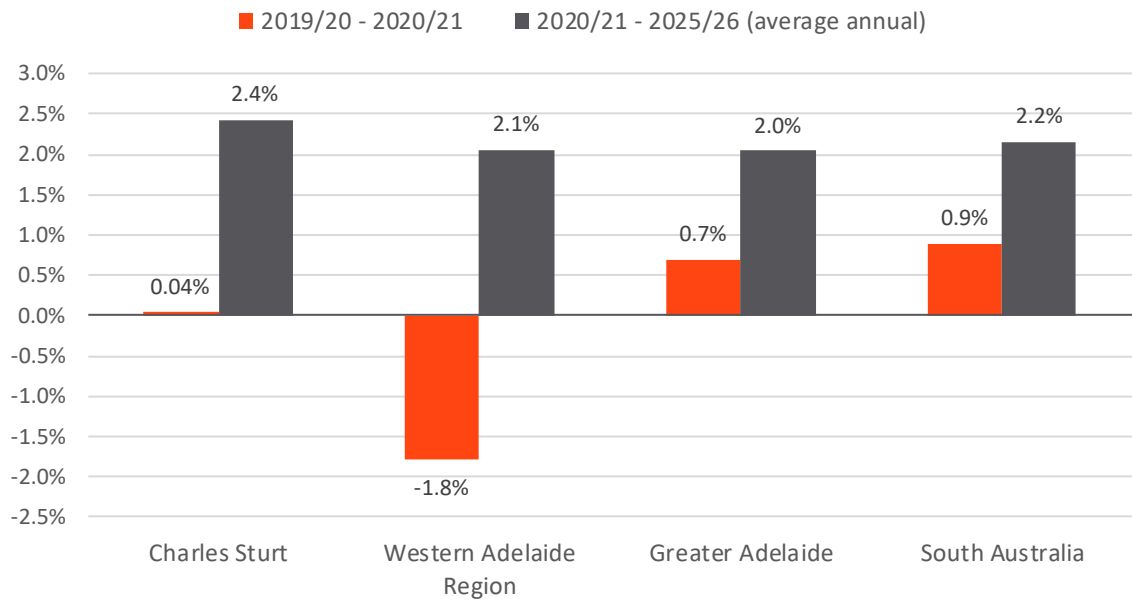
Average annual growth rate, %



Source: NIEIR, 2021; adjusted to 2022

## Jobs Forecast - Charles Sturt

Average annual growth rate, %



Source: NIEIR, 2021; adjusted to 2022



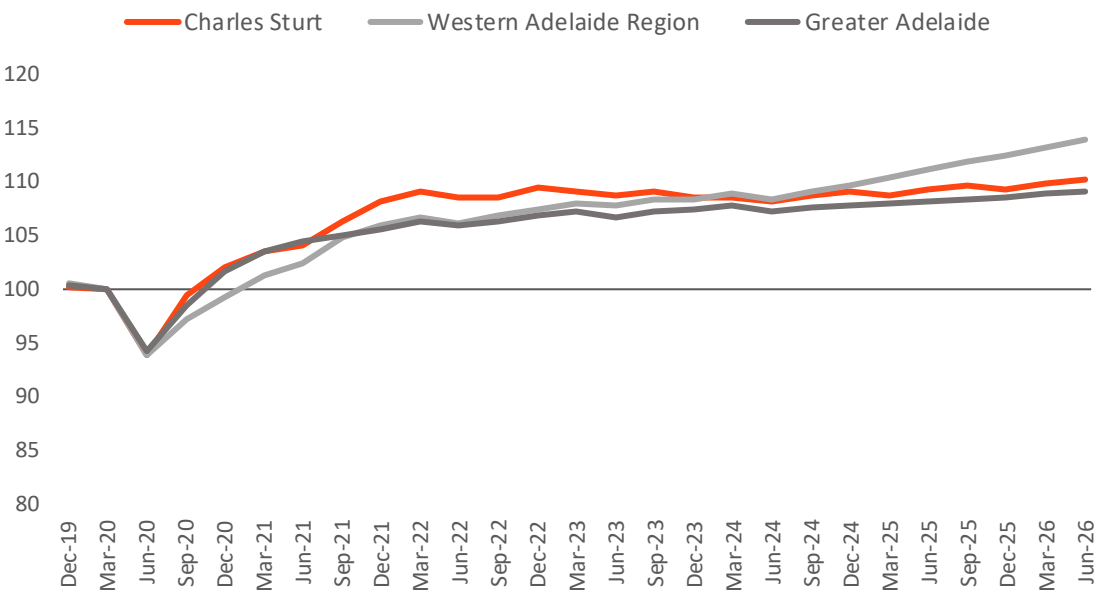
# Jobs and GRP recover similar to the Greater Adelaide average

GRP recovered back above the pre COVID-19 levels by December Quarter 2020, similar to the Greater Adelaide average.

Jobs are back above the pre COVID-19 levels by June Quarter 2021 quarter, similar to Greater Adelaide.

## GRP change forecast - Charles Sturt

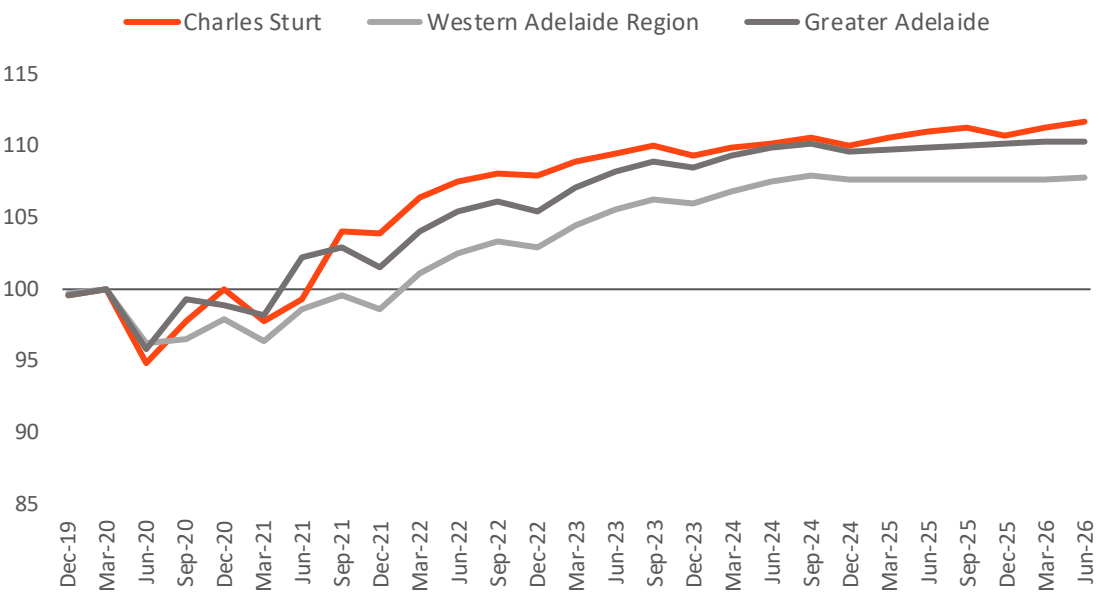
Index March 2020 = 100



Source: NIEIR, 2021; adjusted to 2022

## Job change forecast - Charles Sturt

Index March 2020 = 100



Source: NIEIR, 2021; adjusted to 2022

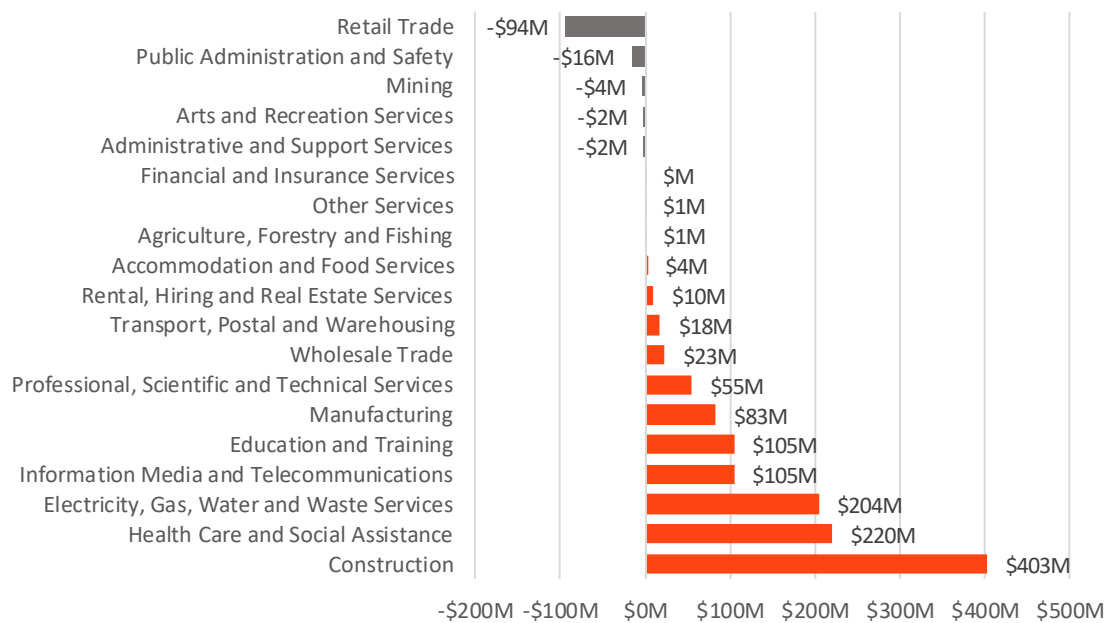
# Population driven industries are forecast to provide strong growth in economic value in the next 5 years

Population driven industries are forecast to experience strong growth in the next 5 years to 2026. Construction output is forecast to grow considerably, followed by the health and utility sectors. However, Retail trade industry output is forecast to decline during the same period.

Value added growth is forecast to be driven by population serving industries. Health, utility, education and construction industries are forecast to grow strongly from 2021 to 2026. Similar to the output, the Retail Trade industry value added is forecast to decrease during the same period.

## Forecast Output Change by Industry - Charles Sturt 2020/21 to 2025/26

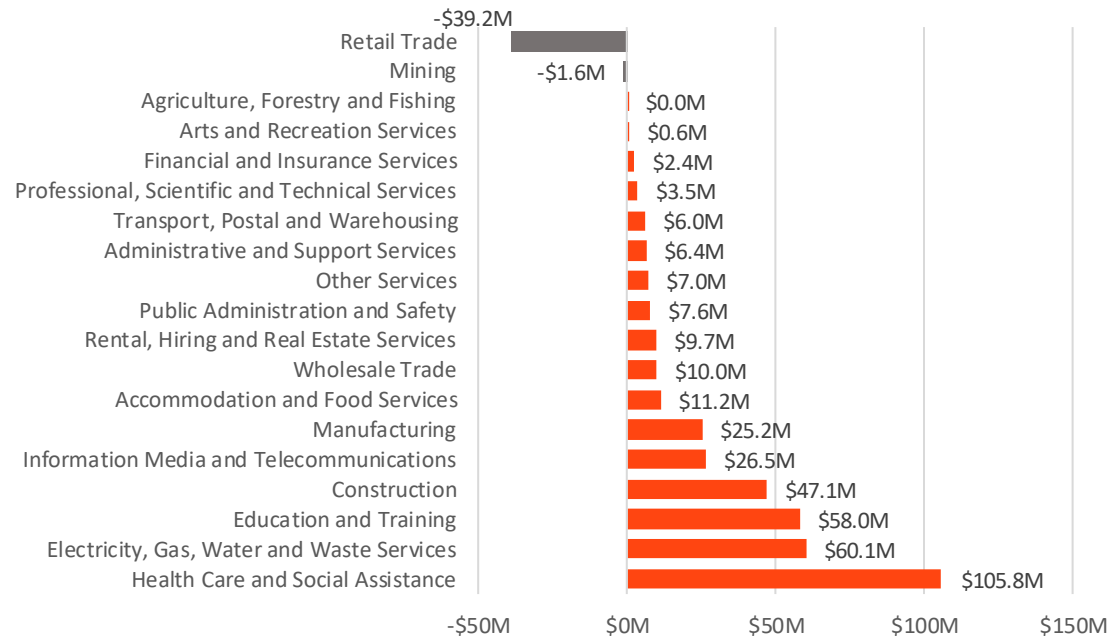
\$M



Source: NIEIR, 2021

## Forecast Value Added Change by Industry - Charles Sturt 2020/21 to 2025/26

\$M



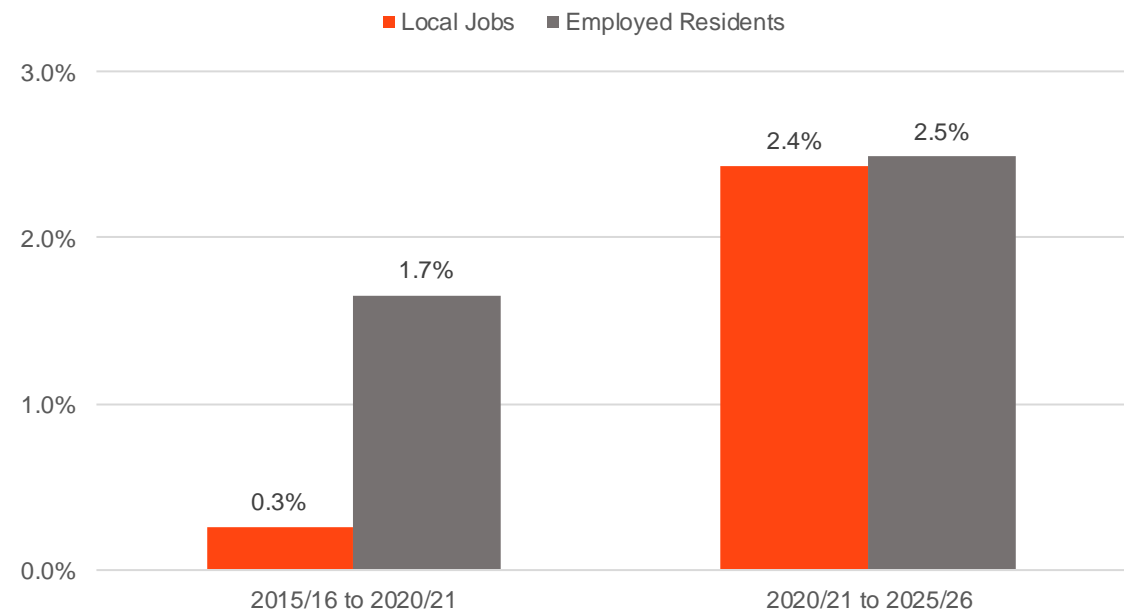
Source: NIEIR, 2021

# Local jobs are expected to grow at a similar rate as employed residents over the next 5 years, but not enough to decrease job deficits

The gap between the local jobs and employed residents growth is forecast to be 0.1% p.a. between 2020/21 and 2025/26. This difference is significantly lower than the 1.4% p.a. difference experienced in 2015/16 to 2020/21. The stronger local jobs growth forecast should help stop the further widening of the gap between local jobs and employed residents.

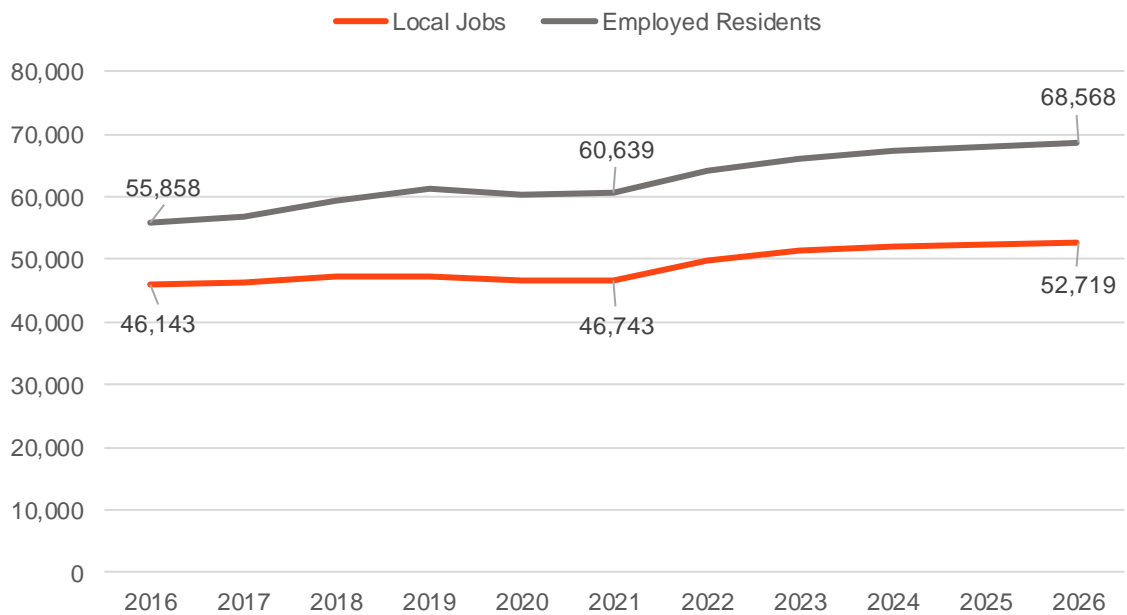
The total number of local jobs is estimated to reach 52,719 by 2026, while employed residents will reach around 68,568, creating a jobs deficit of approximately 15,849. This is a 1,953 increase in the current estimated jobs deficit with the jobs to employed residents' ratio of 0.77 in 2026, the same as the level in 2021.

Forecast employment growth, 2016 to 2026 - Charles Sturt %



Source: NIEIR, 2021; adjusted to 2022

Forecast growth in jobs and employed residents persons



Source: NIEIR, 2021; adjusted to 2022

Forecast Local Job and Employed Residents Change by Industry - Charles Sturt, 2020/21 to 2025/26

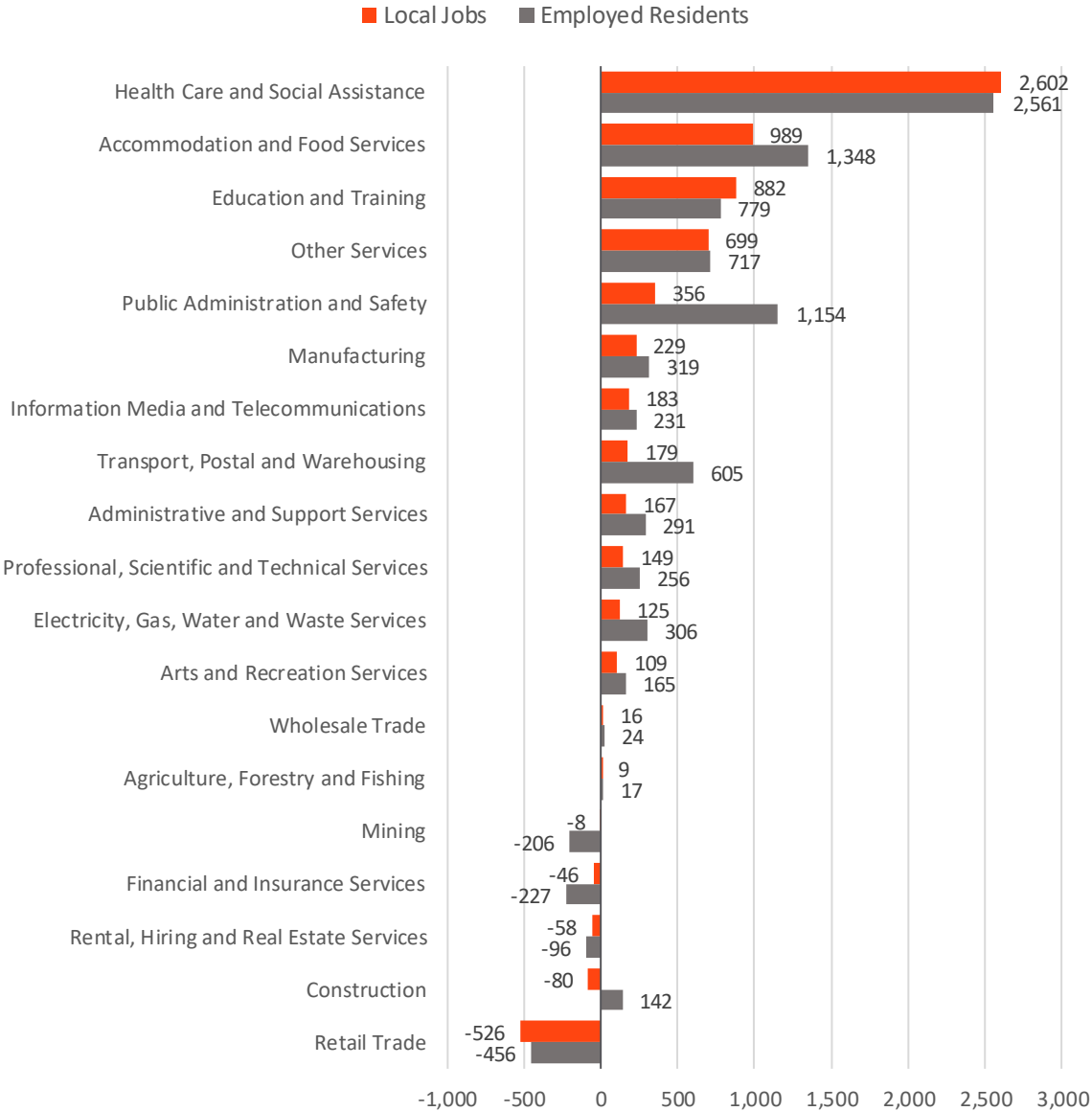
Number of Jobs

Local jobs and employed residents growth is forecast to continue to be driven by population servicing industries

The growth in local jobs and employed residents is forecast to be driven by population serving industries in health, hospitality, education and other services (incl. personal and household services). Particularly, TQEH redevelopment will provide a boost in professional health jobs. Despite the significant COVID-19 impacts, the hospitality and other service jobs are forecast to grow as the population increase.

Employed residents are forecast to increase in professional and business service jobs. Particularly, residents working in Public Administration and Safety, Professional, Scientific and Technical and Administrative services industries are forecast to grow strongly compared to local jobs.

Manufacturing sector local jobs and employed residents are forecast to increase driven by the defence investment in Western Adelaide Region and resulting supply chain impacts.



# Increase in professional, community and personal service occupations. Significantly more jobs requiring higher qualifications

In the next 5 years to 2026, it is forecast that over 57% of the jobs growth will be in professional or community/personal service occupations. This share is significantly higher than 32% of total occupations in these industries in 2016.

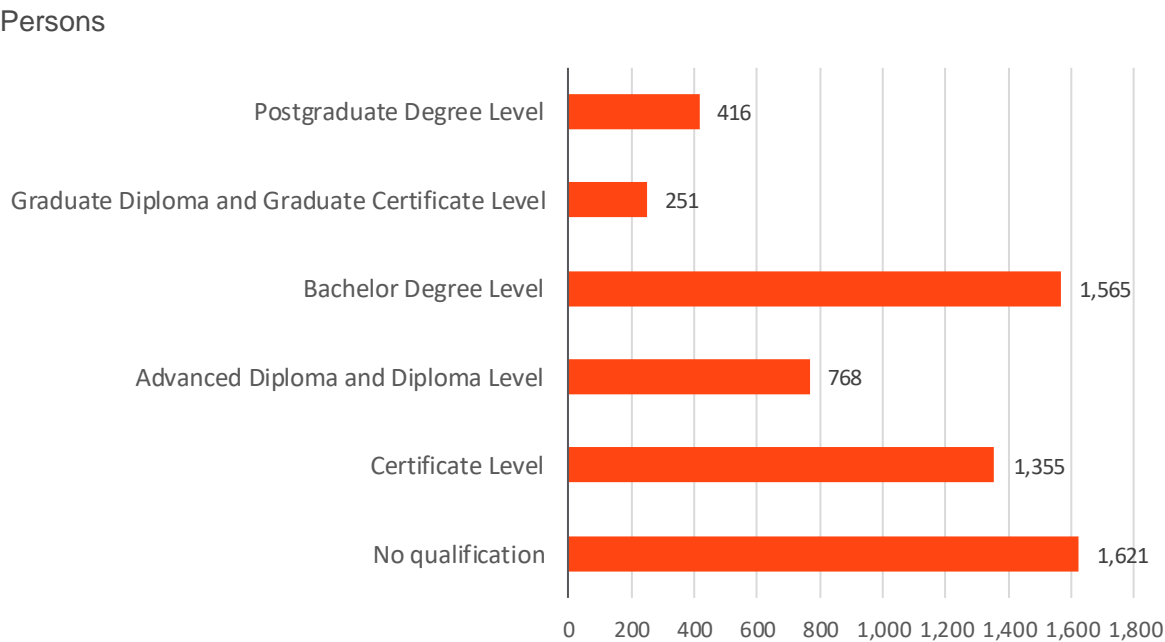
During the same period, it is forecast that over 37% of the new jobs created will require Bachelor Degree or above level qualifications. This is over 3 times the 11% of the education level of Charles Sturt's workforce in 2016.

## Occupation Demand Forecast - Charles Sturt 2020/21 to 2025/26



Source: ABS Census 2016; NIEIR, 2021

## Skills/Qualifications Demand Forecast - Charles Sturt 2020/21 to 2025/26



Source: ABS Census 2016; NIEIR, 2021

# Major projects included in the NIEIR forecast

.id’s economists worked with the City of Charles Sturt’s Economic Development team to understand the likely major project activity in the region and surrounds. The forecasts within this report rely on the National Economics (NIEIR) economic model and are based on the bottom-up development assumptions. The list below includes the projects included in the forecast.

## Major projects in Charles Sturt

Project	Time frame	Value	Estimated Jobs (direct / supply chain)
<b>Infrastructure projects</b>			
Military Road & Main St Precinct Upgrade	2021-23	\$12.5 million	19 / 24
Woodville Road Streetscape Upgrade	2021-22	\$9 million	14 / 17
Torrens Road, Ovingham – Level Crossing Upgrade	2019-22	\$231 million	358 / 436
Coopers Stadium Upgrade, Hindmarsh	2021-23	56.5 million	90 / 112
Former 36ers Basketball Stadium Redevelopment, Crittenden Rd, Findon	2022-23	\$20 million	32 / 40
Torrens to Darlington, North/South Corridor Project	2023-31	\$9.9 billion	15,816 / 19,681
<b>Major developments</b>			
Bowden Village Development	2013-25	\$1 billion	2,046 / 3,263
The Square, Woodville West Redevelopment	2012-23	\$130 million	266 / 424
West Development, West Lakes	2015-27	\$1 billion	2,046 / 3,263
Apartments, 147 Brebner Drv, West Lakes	2022-23	\$12 million	22 / 33
Residential & Mixed Use Development, 78 Gibson St, Bowden	2022-23	\$5.3 million	42278
Residential, Retail and Child Care Dev, 46-52 Crittenden Rd, Findon	2022-23	\$20 million	37 / 56
Shopping Centre Redevelopment, 53-59 Tapleys Hill Rd, Hendon	2022-23	\$12 million	19 / 33
Queen Elizabeth Hospital Upgrade	2018 - 21	\$270 million	364 / 861
Retirement Facility, Aura, Findon	2020-21	\$55 million	113 / 179
Aged Care Facility, West Lakes	2019 - 21	\$45 million	92 / 147
Retirement Village – Sportsmans Drv, West Lakes	2021 - 22	\$8.1 million	17 / 26
Aged Care Facility Redevelopment, Sylvan Way, Grange	2022-23	\$85 million	158 / 237
Henley High School Redevelopment	2019-21	\$12 million	16 / 38
Seaton High School Redevelopment	2019-21	\$20 million	27 / 64
Woodville High School Redevelopment	2019-21	\$10 million	13 / 32
White Friars Catholic School Redevelopment, Woodville Park	2022-23	\$6.5 million	10 / 18

Source: The City of Charles Sturt Council

## Major projects in proximity to Charles Sturt

Project	Time frame	Value	Estimated Jobs (direct / supply chain)
<b>Infrastructure projects</b>			
Grand Junction, Hampstead & Briens Roads Intersection Upgrade	2019-21	\$19 million	29 / 36
Submarine Shipyard - Osborne	2019-23	\$1.5 billion	2,322 / 2,831
Stage 2: Further terminal expansion, expanded freight facilities, office	2020-34	\$1 billion	1,548 / 1,887
Brighton Road, Hove - Level Crossing Upgrade	2019-22	\$171 million	265 / 323
Glenelg Jetty redevelopment - tourism and economic hub	2015 – 30	\$280 million	378 / 893
Jetty Road Glenelg Master Plan	2018-28	\$19.3 million	30 / 36
Brighton Oval upgrade	2019-21	\$13.7 million	20 / 16
Glenelg Oval upgrade	2019-25	\$20 million	16 / 19
Holdfast Stormwater Management Plan	2017-27	\$26 million	40 / 54
Henley Beach Road Mainstreet Project	*	\$8 million	43070
Mile End Priceline Stadium Upgrade	*	\$12 million	19 / 25
Thebarton Oval Redevelopment	*	\$18 million	24 / 54
Adelaide Bio Hub, Thebarton	2021-23	\$350 million	468 / 1,057
Thebarton Theatre Redevelopment	*	\$27 million	36 / 82
<b>Major developments</b>			
Ocean View P-12 College Redevelopment	2019-21	\$5 million	7 / 16
Industrial and commercial developments (various projects)	*	\$1.2 billion	1,618 / 3,828
Lightsview Development	2008-21	\$1.05 billion	2,056 / 3,279
Port Plaza Shopping Centre Redevelopment	2018-21	\$50 million	58 / 137
Inner North Government Lands redevelopment (Oakden, Gilles Plains &	2016-26	\$350 million	716 / 1,142
Fort Largs Redevelopment	2016-21	\$90 million	184 / 294
Gilman, Dry Creek & Wingfield Employment Lands	10 yrs*	\$755 million	1,018 / 2,409
Port Direct & Osbourne Employment Lands	2015-25	\$100 million	135 / 319
Techport Employment Lands	2015-25	\$32 million	43 / 102
State Sports Park, Gepps Cross	2019-27	\$150 million	201 / 453
Marina South Development, North Haven	2020-23	\$40 million	53 / 121
Blair Athol Redevelopment – SA Housing Authority	2021	\$50 million	101 / 154
Woodville Gardens – SA Housing Authority	2021-23	\$23.5 million	47 / 72
Dock One - Residential & Accommodation Development	2019 - 22	\$168 million	344 / 548
Fletchers Slip – Residential Development	2019-22	\$160 million	327 / 522
McLaren Parade, Port Adelaide - six storey Hotel	2020-22	\$60 million	80 / 181
Road Transport Terminal, Gillman	2019-21	\$12 million	19 / 23
Retail Store and Offices – Gepps Cross	2019-21	\$12 million	16 / 38
Minda Retirement Village & redevelopment, North Brighton	2014-2022	\$200 million	409 / 653
Langham Hotel Adelphi Tce, Glenelg	2020-21	\$110 million	148 / 351
Taplin Apartments, Brighton Rd/Jetty Rd, Glenelg	2020-21	\$15 million	31 / 49
Taplin Hotel, Jetty Rd/Colley Tce, Glenelg	2021-22	\$27 million	70 / 80
Brighton High School Redevelopment	2019-21	\$13.8 million	19 / 44
Underdale High School Redevelopment	2019-21	\$20 million	27 / 64
Ebor Ave, Mile End - Four storey development	2021-22	\$6.5 million	13 / 20
Apartments, 177-179 Henley Beach Rd, Mile End	2021-22	\$11 million	23 / 36
Apartments, 192 Anzac Highway, Glandore	2021-22	\$10 million	20 / 33
Multi- use Building, 12-22 Richmond Rd, Keswick	2021-22	\$18.5 million	25 / 59

# 10 Which macro forces may influence the economic outlook?

## South Australia economy

South Australia was less impacted compared to the other states and made a strong recovery from the economic impacts stemming from the COVID-19 pandemic. This was driven by the effective response to COVID-19 and subsequent limited need for lockdowns.

In 2020/21, the state recorded a 3.9% increase in GSP, the strongest increase out of all states. The main driver of the increase was Agriculture, Manufacturing and Wholesale trade, where Charles Sturt has a strong specialisation in the latter two industries. Key 2020/21 quarter average economic indicators are all trending up with a strong increase in building approvals and retail trade.

Business confidence improved significantly in 2020/21 to 132.3, an increase of 29% compared to 2019/20. South Australia has a strong pipeline of planned public infrastructure projects that will maintain demand for large scale construction-related activities in the near future. Many of these projects are around Charles Sturt, supporting resident jobs.

Household dwelling construction and approvals rebounded strongly from February 2021 since the fall of June 2021. Dwelling approvals have benefited from government incentives, low interest rates and growing demand.

The state's economy will continue to recover in 2021/22, albeit at a slower rate. However, given the outcomes for global economic growth, rise in commodity prices, national economic and population growth, the South Australian GSP and population growth rate over the mid-2020s, on a trend basis, will be higher than the recent historical trends.

Industry wise, a higher exchange rate in the near future may have a negative impact on export based industries (e.g. grain, wine). However, some businesses will likely be impacted by decreasing the cost of key imported inputs.

Tourism still faces a challenging future. While domestic visitation has rebounded in some areas, restrictions on international and interstate travel remain (during covid outbreaks)

Although the labour market conditions improved in 2020/21, the employment growth has slowed down in the second half of the year. Skills and general labour shortages are a real challenge. A tightening labour market may lead to a modest rise in wages growth over the next year.

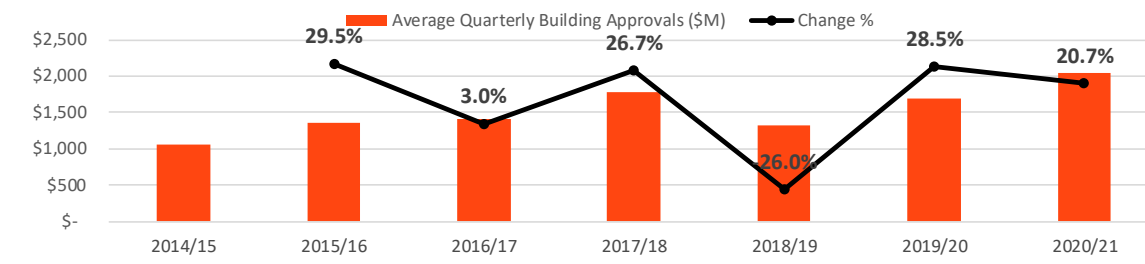
South Australia has made a small interstate migration gain in the latter half of 2020/21. However, slower international immigration will have a negative impact on population growth, especially in metro areas such as Charles Sturt with a high level of immigration.

The arrival of the Omicron variant of coronavirus adds a new layer of uncertainty to the state's economic recovery. The latest outbreak is likely to decrease the national and state's economic activity and slow down the ongoing recovery.

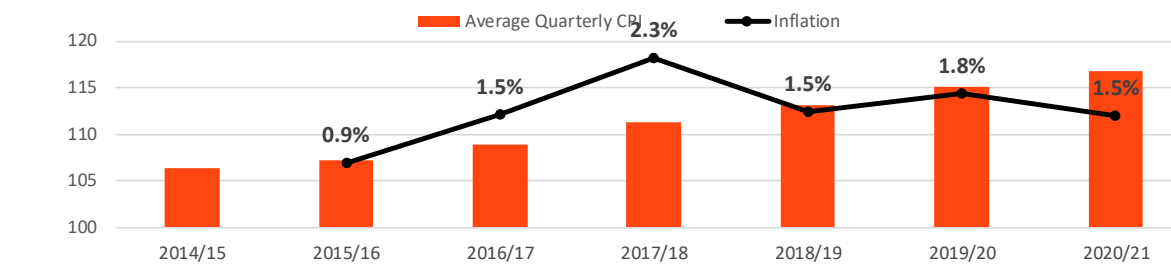


# South Australia indicators

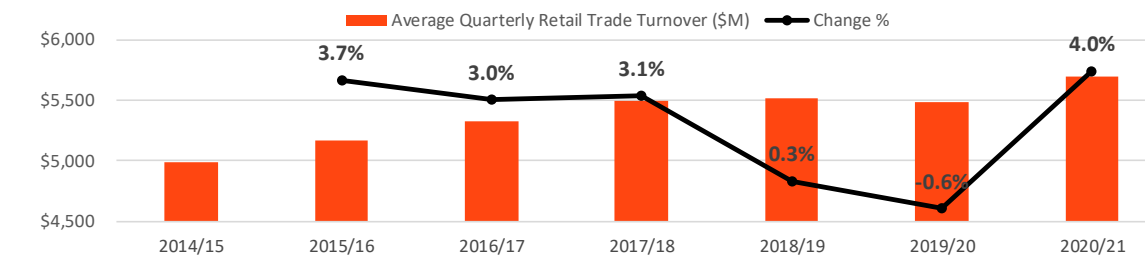
## Building Approvals



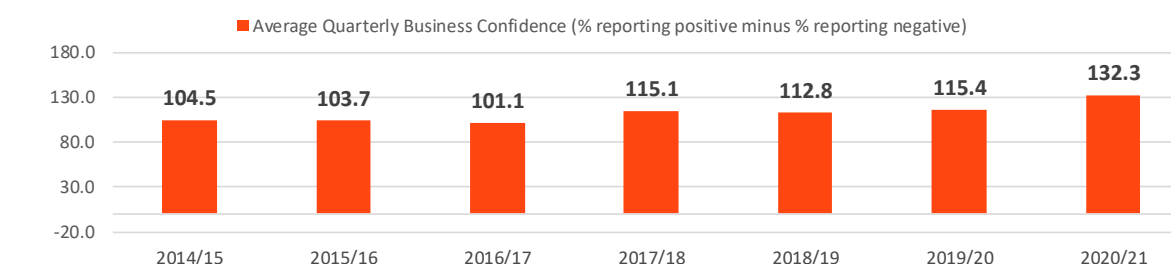
## Inflation



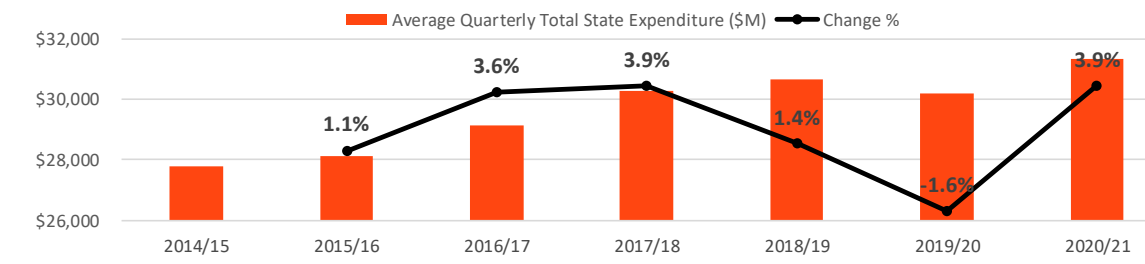
## Retail Trade



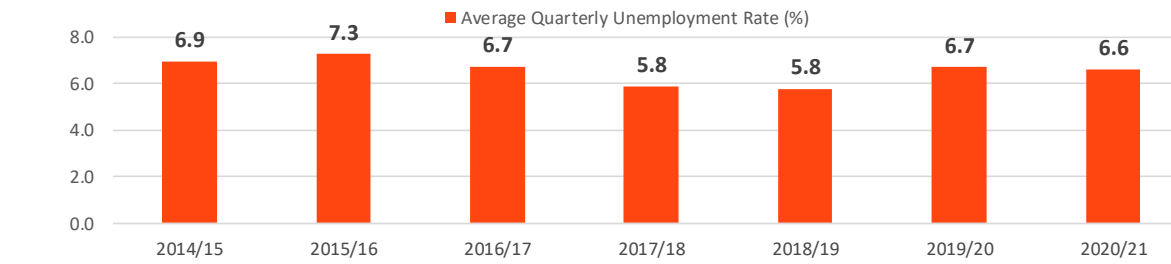
## Business Confidence



## Total State Expenditure



## Unemployment



# Macro economy

Before the COVID-19 crisis, there were indications that Australia and the Global economy was heading towards a more weakened economic environment than what we had experienced over the last decade. Some of these included:

- Ongoing US-China trade wars impacting world economic growth.
  - The potential for higher interest rates in the US to address excess liquidity created by quantitative easing and likely changes in US fiscal policy at some point to address rising government deficits.
  - The likelihood of higher US interest rates triggering an outflow of funds from emerging markets leading to potential exchange rate/banking crises in these countries
  - A credit squeeze on local banks leads to constrained lending growth and in turn, lower residential development commencements going forward. However, this had been offset recently by changes to monetary policy.
  - Excess supply in the housing market leads to slower price growth and a weaker market over the next five years before the cycle flips again.
  - A reverse wealth effect, where declining (or weaker growth in) house values lead to increases in the household savings ratio and less consumption. However, there were signs that housing conditions in Sydney and Melbourne had stabilised with clearance rates starting to turn around (more potential buyers vs sellers).
  - Lower AUD exchange rate vs major currencies due to connection to emerging markets and changing interest rate levels between Australia and other economies, particularly the US. This may have counterbalanced weakened international demand due to trade uncertainty.
- 

However, since the COVID impacts saw the economy bottom out in the June quarter of 2020, government spending and incentives have boosted the national economy and reversed some of these indicators.

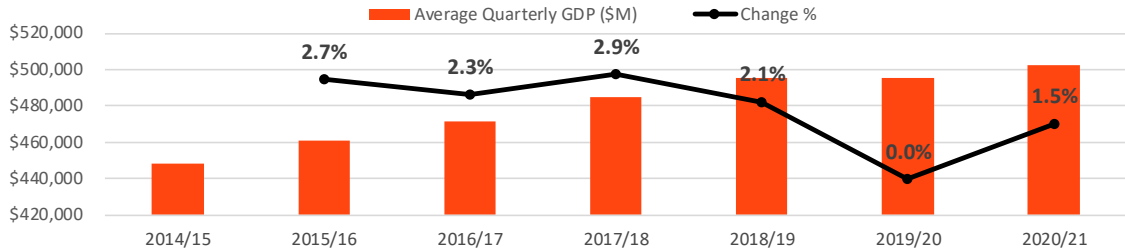
- Housing approvals are at an all time high boosting construction employment but causing supply constraints and skill shortages
- Private investment in machinery and equipment has increased strongly due to policies such as instant asset write-offs. However, private non-residential building investment has not increased by as much and will face cost pressures due to residential building demands.
- House values have risen considerably, however household saving ratios have not fallen as much due to future uncertainty.
- The AUD exchange rate vs major currencies has risen due to strong international demand for commodities, the perception of a stronger domestic economy relative to other countries and higher interest rate levels between Australia and other economies.

Unemployment has fallen in recent quarters and is supposedly back to pre-COVID levels as excess capacity is taken up by growth in the construction industry in particular. This has driven participation back in the labour force too.

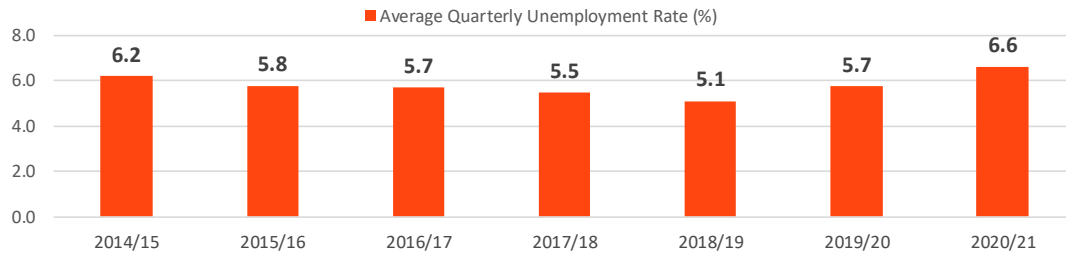
The strong recovery pushed the average quarterly GDP well above the pre COVID-19 level in March and June Quarters 2021. However, in September 2021, the outbreak of COVID-19 Delta strain has sent many states into lockdown and, subsequently, the GDP decreased to the level just above the pre COVID-19 level.

# National indicators

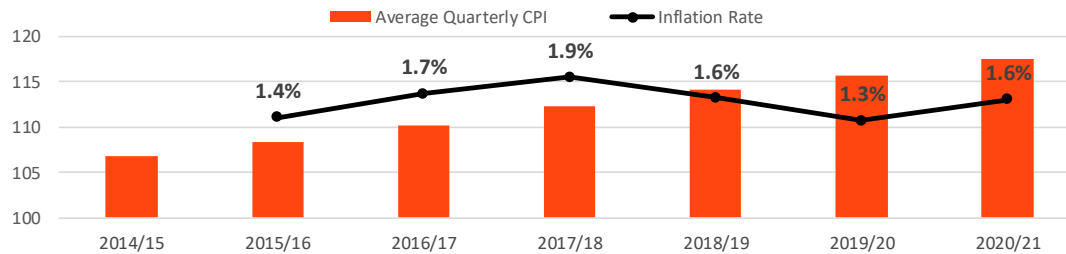
## Gross Domestic Product



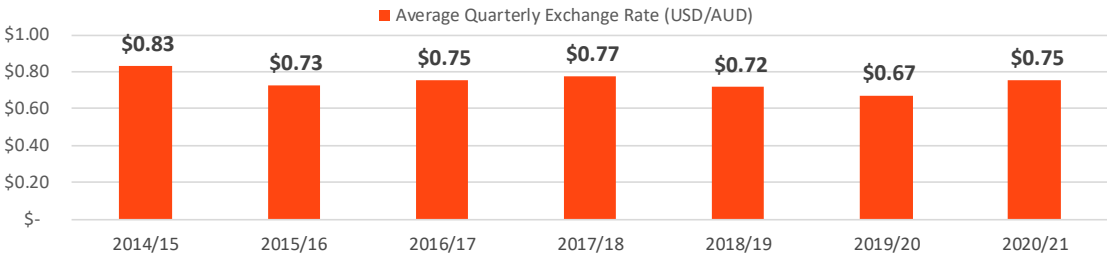
## Unemployment Rate



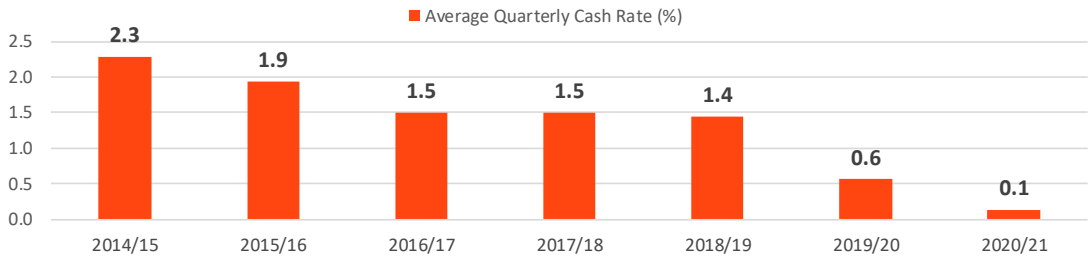
## Inflation



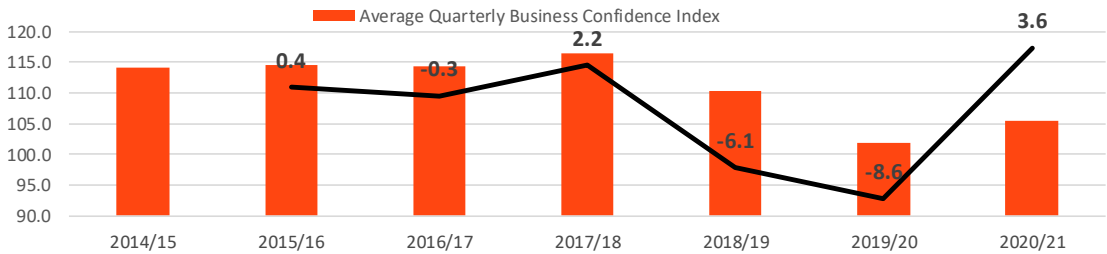
## Exchange Rate



## RBA Cash Rate



## Business Confidence



# Key macro level industry outlooks – large local employers or specialisations

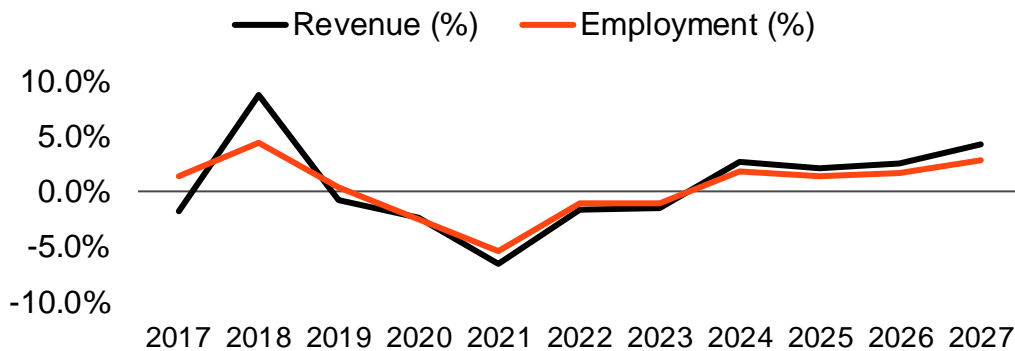
## Construction

Construction industry's performance is forecast to gradually improve over the next five years at a national level, supported by solid growth in non-building infrastructure markets, recovering demand for new housing construction and improved opportunities for some specialised construction trades.

However, the economic fallout from the COVID-19 pandemic, the pace of recovery in the general economy and the capacity for households to invest in new building construction are anticipated to constrain the short-term performance of key building industries.

Demand from the non-residential building construction sector is forecast to decline over the next five years, as investor confidence in the commercial property market remains slow to recover and constrains the division's performance.

## Construction forecasts – Australia



Source: Ibisworld.com, 2021

## Multipliers – Charles Sturt 2019/20

Type	Multiplier per \$1m additional sales
Output	1.09
Value Added	0.27
Jobs	3.5

Source: NIEIR

### Upstream

- Finance
- Integrated Logistics
- Bricklaying Services
- Heavy Industry and Other Non-Building Construction
- Professional Services
- Concreting Services
- Engineering Consulting
- Iron Smelting and Steel Manufacturing
- Accounting Services
- Gravel and Sand Quarrying
- Legal Services
- Commercial Vehicle Wholesaling
- Structural Steel Fabricating
- Cement and Lime Manufacturing
- Clay Brick Manufacturing
- Copper Tubes and Wire Manufacturing
- Employment Placement and Recruitment Services
- Computer and Electronic Office Equipment Manufacturing

### Downstream

- Architectural Services
- Engineering Consulting
- Surveying and Mapping Services
- Site Preparation Services
- Commercial and Industrial Building Construction
- Institutional Building Construction
- House Construction
- Retail Property Operators
- Office Property Operators

Source: Ibisworld.com, 2019

# Key macro level industry outlooks – large local employers or specialisations

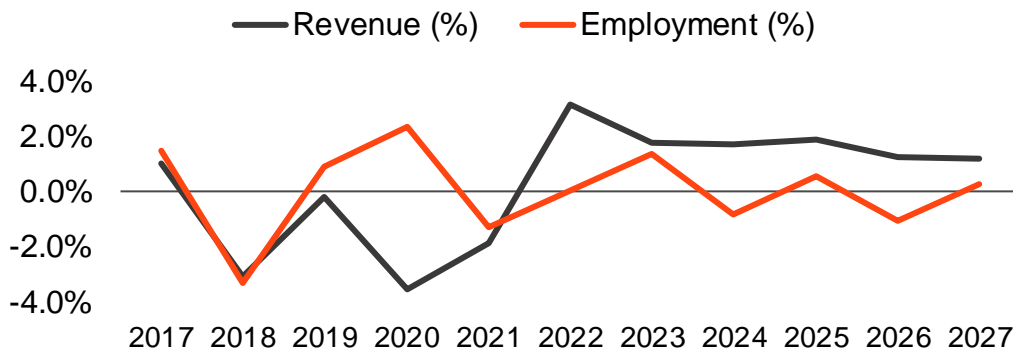
## General Grocery Wholesale

The General Grocery Wholesale industry is expected to continue facing mixed business conditions over the next five years.

The industry is forecast to experience an increase in demand from the food services sector in the next five years as the recovery from the impact of COVID-19 continues and government social distancing restrictions ease. However, wholesale bypass trends and an increase in price competition are expected to limit demand for wholesalers that cater to general food and grocery retailers.

However, advances in inventory management, warehousing and global distribution system technology are anticipated to improve the efficiency of wholesaling operations over the next five years.

## General Grocery Wholesale forecasts – Australia



Source: Ibisworld.com, 2021

## Multipliers – Charles Sturt 2019/20

Type	Multiplier per \$1m additional sales
Output	1.07
Value Added	0.56
Jobs	3.8

Source: NIEIR

### Upstream

- Egg Farming
- Cereal, Pasta and Baking Mix Manufacturing
- Cake and Pastry Manufacturing
- Chocolate and Confectionery Manufacturing
- Seafood Processing
- Tea, Coffee and Other Food Manufacturing
- Flour and Grain Mill Product Manufacturing
- Sugar Manufacturing

### Downstream

- Fuel Retailing
- Restaurants
- Fast Food and Takeaway Food Services
- Supermarkets and Grocery Stores
- Convenience Stores
- Consumers in Australia

Source: Ibisworld.com, 2019

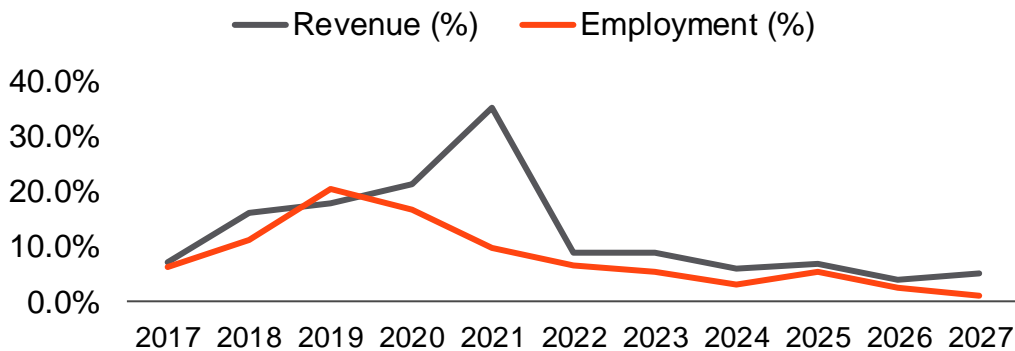
# Key macro level industry outlooks – large local employers or specialisations

## Online Shopping

Over the next five years, the Online Shopping industry is forecast to continue to grow strongly driven by the convenience and competitive prices the industry offer. Also, an increase in discretionary incomes and consumer sentiment is expected to provide a boost to the industry performance. However, increasing competition within the industry will constrain profitability.

The online shopping businesses are anticipated to reach wider customers with the NBN rollout completed driving faster broadband speeds, internet penetration and increased transaction security. Moreover, an increase in internet connectivity and improvement in IT will enable the businesses to provide better service and, subsequently, increase the average spend per customer.

## Online Shopping forecasts – Australia



Source: Ibisworld.com, 2021

## Multipliers – Charles Sturt 2019/20

Type	Multiplier per \$1m additional sales
Output	1.11
Value Added	0.64
Jobs	11.0

Source: NIEIR

### Upstream

- Household Appliance Wholesaling
- Clothing Wholesaling
- Cosmetics and Toiletry Wholesaling
- Toy and Sporting Goods Wholesaling
- Internet Service Providers
- Courier Pick-up and Delivery Services
- Wired Telecommunications Network Operation
- Wireless Telecommunications Carriers
- Communication Equipment Manufacturing
- Commercial Vehicle Wholesaling
- Fuel Retailing
- Clothing Manufacturing
- Cosmetics, Perfume and Toiletries Manufacturing
- Household Appliance Manufacturing
- Toy and Sporting Goods Manufacturing

### Downstream

- Consumers in Australia

Source: Ibisworld.com, 2019

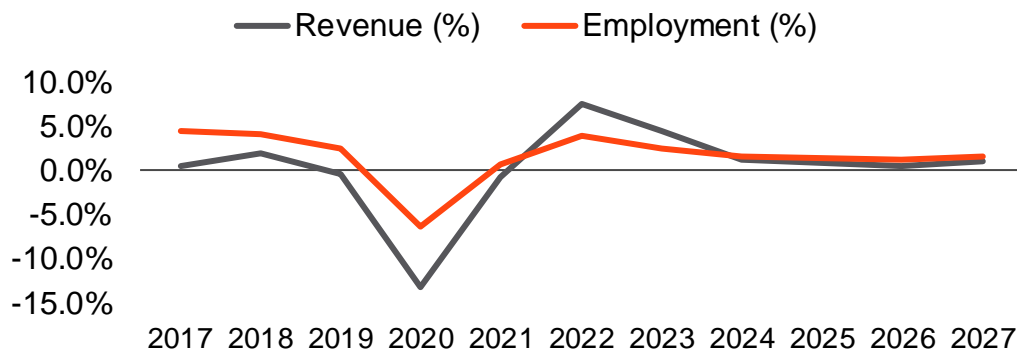
# Key macro level industry outlooks – large local employers or specialisations

## Food and Beverage Services

The Food and Beverage industry is forecast to recover over the next five years, as restrictions implemented in response to COVID-19 are gradually lifted with the increase in vaccination rate. Subsequently, consumers are anticipated to increase eating out over the next five years and the industry performance is projected to rise.

The two major trends currently affecting the industry are trendy food and beverage culture and health-conscious consumption. These trends present both a threat and an opportunity for the businesses in Food and Beverage industry and are anticipated to boost demand for higher margin premium products.

## Food and Beverage Services forecasts – Australia



Source: Ibisworld.com, 2021

## Multipliers – Charles Sturt 2019/20

Type	Multiplier per \$1m additional sales
Output	1.08
Value Added	0.48
Jobs	10.2

Source: NIEIR

### Upstream

- Meat, Poultry and Smallgoods Wholesaling
- Dairy Produce Wholesaling
- Fish and Seafood Wholesaling
- Fruit and Vegetable Wholesaling
- Soft Drink and Pre-Packaged Food Wholesaling
- Liquor Wholesaling
- Tea, Coffee and Other Food Manufacturing
- Spirit, Beer, Wine Manufacturing
- General Line Grocery Wholesaling
- Temporary Staff Services
- Gaming and Vending Machines Manufacturing

### Downstream

- Consumers in Australia
- Domestic Airlines
- Education and Training
- Health Services
- Integrated Logistics

Source: Ibisworld.com, 2019

# Key macro level industry outlooks – large local employers or specialisations

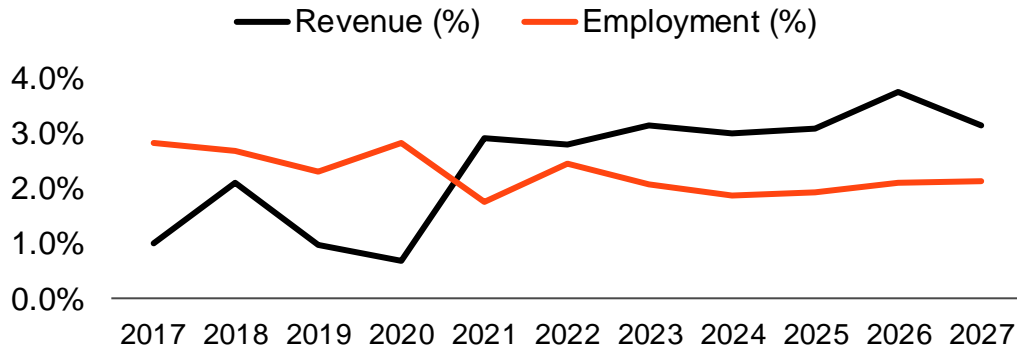
## Health Services

The Health Services industry is forecast to continue to grow strongly over the next five years due to the ageing population, the increasing chronic diseases and rising private health insurance coverage. The majority of growth will be from general hospitals but growth in private health insurance coverage will likely continue to boost other allied health services that derive revenue from private health benefits.

The industry businesses and infrastructures are expected to increase over the next five years to meet the demands of the growing and ageing population, particularly in areas with high population growth and density. Although employment is forecast to grow, revenue growth is expected to increase at a higher rate as efficiency improves and technology usage increases.

Changes to government funding could substantially affect the health service industry. Currently, government funding accounts for just under 70% of all health services revenue. Moreover, a decrease in insurance rates for the young have placed cost pressures upward on the private health system, pricing more Australians out of private health insurance and causing severe issues for the long-term sustainability of Australia's private health services.

## Health Services forecasts – Australia



Source: Ibisworld.com, 2021

## Multipliers – Charles Sturt 2019/20

Type	Multiplier per \$1m additional sales
Output	1.08
Value Added	0.63
Jobs	5.5

Source: NIEIR

### Upstream

- Specialist Medical Services
- Pathology Services
- Other Health Services
- Pharmaceuticals Wholesaling
- Medical and Scientific Equipment Wholesaling
- Commercial Cleaning Services
- General Practice Medical Services
- Soap and Cleaning Compound Manufacturing
- Adhesive Manufacturing
- Packaging Services
- Plastic Pipe and Plastic Packaging Material Manufacturing
- Glass and Glass Product Manufacturing
- Audio Visual Electronic Equipment Manufacturing
- Basic Organic Chemical Manufacturing
- Basic Inorganic Chemical Manufacturing
- Medical and Surgical Equipment Manufacturing
- Pharmaceutical Product Manufacturing

### Downstream

- General Insurance
- Finance
- Consumers

Source: Ibisworld.com, 2019



# Key macro level industry outlooks – large local employers or specialisations

## Aged Care and Residential Services

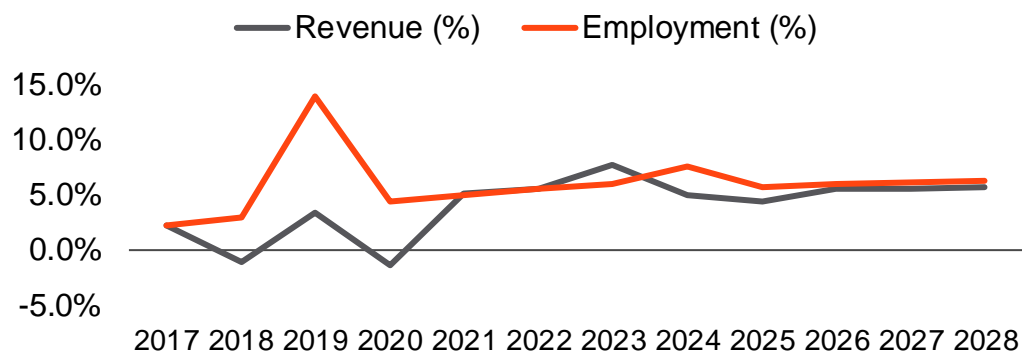
The Aged Care and Residential Services industry is forecast to continue growing over the next five years, as the aging population and the growing need for age-appropriate accommodation are projected to grow.

Regulatory reforms are set to occur over the next five years following the Royal Commission's seven volume final report, which calls for whole-of-system reform and redesign.

The dynamics of the industry are set to change in the next five years due to the structural reforms following the Royal Commission's report. The change will see the allocation of a residential aged care place shift to the person from 1 July 2024, rather than the aged care provider.

The current businesses in the industry are likely to face a more competitive residential care market and wage costs, limiting the profitability.

## Aged Care and Residential Services forecasts – Australia



Source: Ibisworld.com, 2021

## Multipliers – Charles Sturt 2019/20

Type	Multiplier per \$1m additional sales
Output	1.05
Value Added	0.77
Jobs	6.2

Source: NIEIR

### Upstream

- Pharmaceuticals Wholesaling
- Cosmetics and Toiletry Wholesaling
- Medical and Scientific Equipment Wholesaling
- General Practice Medical Services
- Medical and Surgical Equipment Manufacturing
- Pharmaceutical Product Manufacturing
- Cosmetics, Perfume and Toiletries Manufacturing

### Downstream

- Consumers in Australia

Source: Ibisworld.com, 2019

# Key macro level industry outlooks – large local employers or specialisations

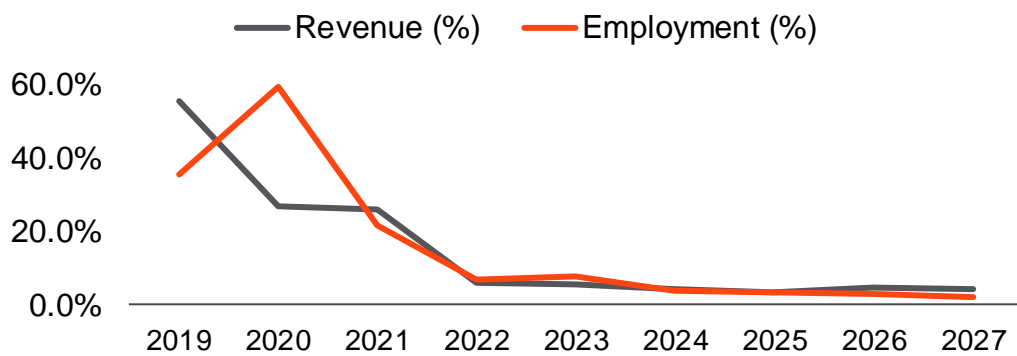
## NDIS Providers

The National Disability Insurance Scheme (NDIS) Providers industry is forecast to grow over the next five years, as the government funding continues to rise and more disabled individuals are approved for the scheme.

The number of disabled individuals in Australia is anticipated to continue rising over the next five years, in line with general population growth. However, the NDIS providers are expected to continue to face challenges providing services due to the COVID-19 pandemic over the next five years.

According to the Federal Government estimates, over 475,000 people are being serviced by the NDIS in 2020-21 and is forecast to grow as more individuals are assessed for NDIS eligibility. The output/revenue of the NDIS providers is forecast to increase at an annualised 4.7% over the five years through 2025-26, to \$32.3 billion.

## NDIS Providers forecasts – Australia



Source: Ibisworld.com, 2021

## Multipliers – Charles Sturt 2019/20

Type	Multiplier per \$1m additional sales
Output	1.06
Value Added	0.77
Jobs	10.8

Source: NIEIR

### Upstream

- Construction
- Medical and Surgical Equipment Manufacturing
- Computer and Electronic Office Equipment Manufacturing
- Technical and Vocational Education and Training
- Specialist Medical Services

### Downstream

- Consumers in Australia
- Health Services

Source: Ibisworld.com, 2019

# 11 Challenges and opportunities for the City of Charles Sturt going forward

# COVID-19 will present new and accelerate long term challenges and opportunities

Charles Sturt's economy has been shaped over the last decade or so by macro trends that influence headline and specific industry growth. Some of these trends are still relevant today and may be elevated or of greater importance due to COVID restrictions we have seen. For example, labour participation risks due to an ageing population have resurfaced as an issue due to the fall in migration of younger working age residents from overseas.

History also shows that the recovery period following economic downturns can accelerate the transition of industries or magnify trends that were already emerging in the economy. Some of these, such as the integration of 5G technology, still have a long way to go in terms of their impacts on sector or business transition.

## Trends evolving over recent decades



Increasing demand for qualified workforce



Ageing population driving health services



Climate change influencing investment decisions



Urbanisation/agglomeration spillovers driving increases in employment density



International migration driving population growth



E-commerce becoming common place

## Trends unfolding in the next few decades



Increase in remote working



5G, smart everything and IoT



AI and automation



Rebalanced supply chains



Circular economy

# Existing trends will continue to shape the region



## Increasing demand for qualified workforce

The City of Charles Sturt workforce is averagely educated. Around 29% of employed residents are degree educated in 2016, the same level as the Greater Adelaide average, but less than the Western Adelaide Region average (31%).

### Implication

Industry growth and development, especially in professional business service areas, may be limited by education levels



## Ageing population driving health care

Health care and social services, especially Hospitals, is the leading employer for the City and above the state and metro average. The redevelopment of TQEH will entrench this specialization.

### Implication

Continued health industry growth expected, need to explore higher value health services or med-tech opportunities.



## Climate change influencing investment decisions

Charles Sturt City Council has a strong commitment to the local environment plan e.g. Living Green, Smart City plan. Businesses are increasingly looking for sites that can allow for reduced emissions and/or have security in energy and water supply.

### Implication

Access to infrastructure (e.g. electric car charging stations), access to renewable energy storage systems and optimisation of low emission transport networks across the region will become increasingly important.



## Urbanisation/agglomeration spillovers driving density

Intensification of commercial and residential development at key transport nodes across Adelaide continues. Numerous locations are developing 'precincts' to better attract investment and encourage collaborations.

### Implication

Leverage Transit-Oriented Developments in Bowden following the North-South Corridor infrastructure projects. Develop sports and entertainment precincts around Coopers Stadium, Adelaide Entertainment Centre and Titanium Security Arena



## International migration driving population growth

Population growth in Charles Sturt has been above the Greater Adelaide average in recent years driven by international migration.

### Implication

The short term restriction on international migration will have an impact on Charles Sturt.



## E-commerce becoming common place

SA experienced a 46.6% YoY growth in online sales in 2020 and 35% of respondents to an ABS survey indicated they prefer to shop online now more than they did before the pandemic.

### Implication

Support online stores to take up underutilised warehouse space. Provide support to the local businesses with low digital literacy and capture market opportunities. E.g. co-working place (Smart City Plan); Wholesale, warehousing and logistics demand in Charles Sturt will grow as online shopping and delivery needs increase.

# Build on increasing SMEs and Professional business services



## Increase in remote working

A McKinsey report showed that most professional business services work, up to 3/4 for financial services, could be done from anywhere without loss of productivity. A remote working survey for SA suggested most office workers would prefer a hybrid model – 2 to 3 days from home.

The City of Charles Sturt had a reasonably high share of working residents (11%) in professional knowledge-based business<sup>1</sup> roles working from home in 2016. The location with the largest amount of these working residents in 2016 was Henley Beach SA2<sup>2</sup> with 20% of all the LGA’s working from home professionals in knowledge-based business industries. However, some areas like West Lakes had a higher proportion of professionals in knowledge-based business industries who worked from home (11.7%) at the time of the Census.

### Implication

- Clear base of residents who are already working flexibly or would benefit from remote working e.g. less commuting
- Charles Sturt offers many facilities and close access to beaches and natural assets that could be attractive to residents considering a move to remote working
- Potential to re-purpose under-utilised office/retail space to support co-working facilities
- Targeted marketing could be delivered aimed at people to stay at home or work at co-working facilities.

## Employed residents working from home in knowledge based business services professional occupations by SA2, 2016

SA2	Share of all LGA	Share of SA2
Henley Beach	20.0%	10.4%
Hindmarsh - Brompton	17.9%	7.7%
West Lakes	17.5%	11.7%
Seaton - Grange	13.8%	8.8%
Woodville - Cheltenham	11.5%	8.3%
Flinders Park	10.1%	6.2%
Beverley	4.1%	5.6%
Royal Park - Hendon - Albert Park	2.5%	5.8%

<sup>1</sup> Finance and Insurance, Information Media and Professional, Scientific and Technical Services industries

<sup>2</sup> SA2 is an ABS small area geography

# Charles Sturt's manufacturing businesses can grow value from Industry 4.0 technology



## 5G, smart everything and IoT

Smart capabilities beyond home settings have been limited to date. With 5G, many companies in manufacturing, mining, construction, transport and agriculture will get a reliable alternative that enables the communication critical for mobile tools, machines, and robots. Industry 4.0<sup>1</sup> applications are set to grow substantially with manufacturing expected to benefit the most. However, other areas such as smart cities, smart energy grids and med-tech can all benefit.

The City of Charles Sturt has the potential to generate substantial value from businesses adoption of these technologies. Manufacturing and Construction are well over-represented compared to the Greater Adelaide average (1.7 times and 1.2 times value added share respectively).

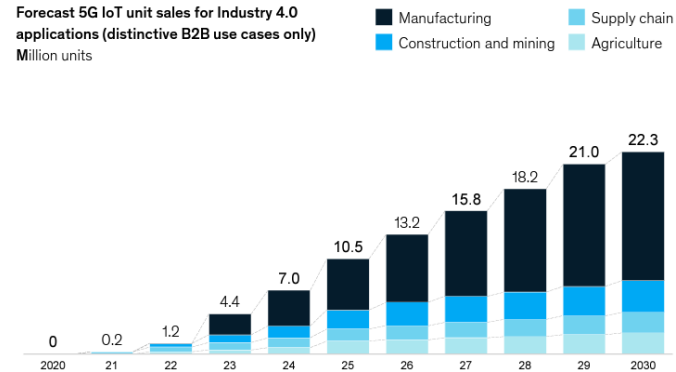
### Implication

- Industry 4.0 opportunities are strong in key sectors - Construction, Manufacturing.
- Explore collaborative industry relations within the city.
- Leverage defence manufacturing opportunities to build smart capabilities.
- Encouragement of upskilling of workers and support businesses to increase digital literacy.
- Investigate and encourage collaboration with local suppliers who can support Smart City initiatives.

<sup>1</sup> Industry 4.0 refers to increased data exchange that allows machinery to adapt autonomously and achieve real-time optimization.

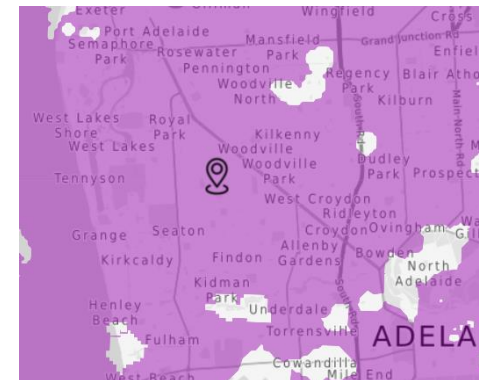
## 5G IoT advancements are set to impact manufacturing the most

Forecast 5G IoT unit sales for Industry 4.0 applications (distinctive B2B use cases only)  
Million units



Source: McKinsey & Co, The 5g era

## Telstra 5G coverage map



Source: <https://www.telstra.com.au/coverage-networks/our-coverage>

# AI can support increased value in health and transport sectors



## AI and automation

It is estimated that about half of the activities (not jobs) carried out by workers could be automated, but only about 5 percent of occupations could be fully automated by currently demonstrated technologies.<sup>1</sup> This suggests job role changes will be more commonplace than job losses.

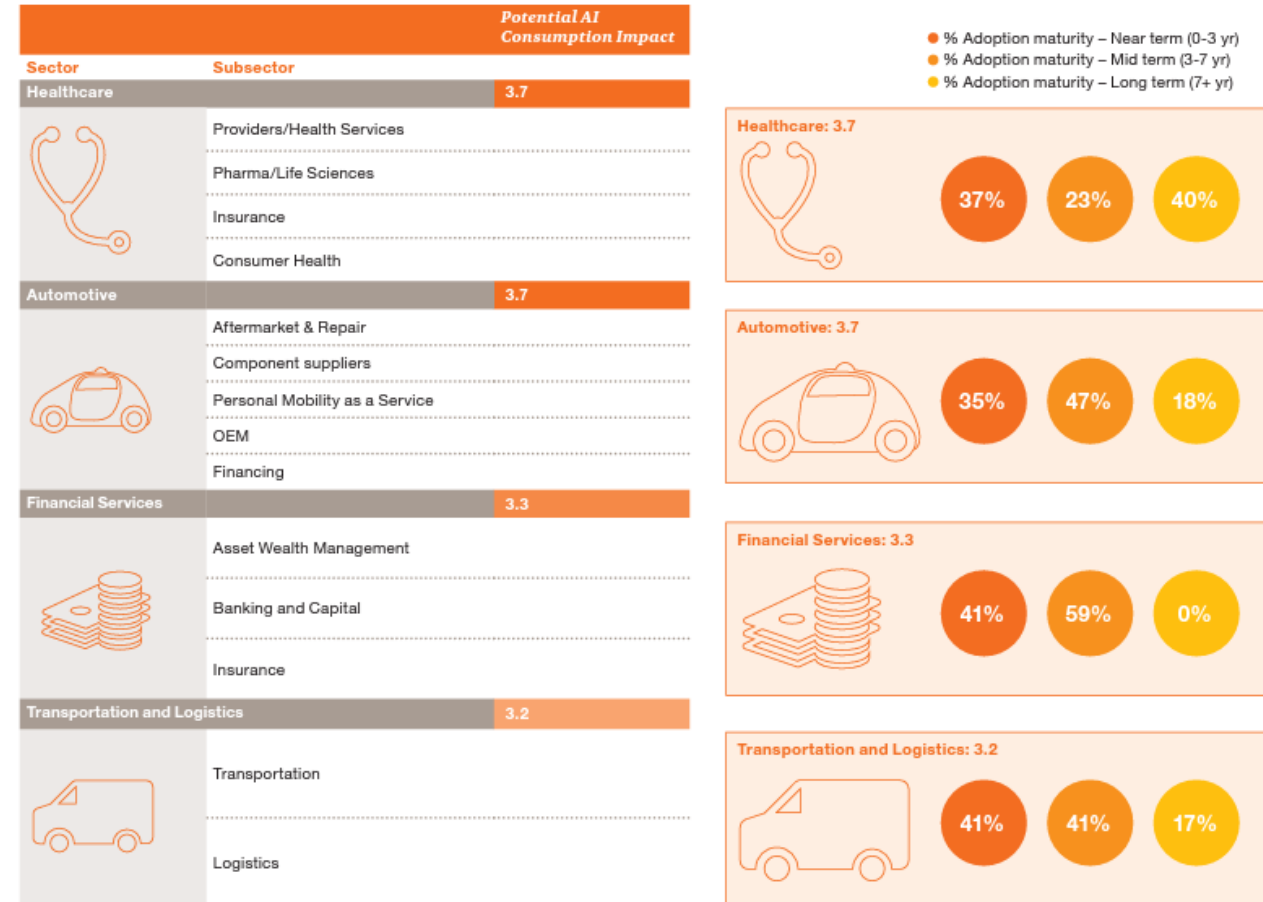
AI is already impacting industries via the way activities like tailored user specific marketing has occurred. The potential is still unravelling in many industries and some set to be impacted the most include health, logistics and finance.

The City of Charles Sturt has the potential to generate substantial value. AI technologies are supported in key industries such as healthcare and transport.

### Implication

- AI opportunities are strong in key sectors – Health and Social Services and Transport
- Opportunity to build a strong tele-health industry tested on the local market but exported anywhere
- Identification of occupations at risk in the region from AI and automation is merited

## Key industries to benefit from AI impacts



<sup>1</sup> McKinsey & Co, AI, automation, and the future of work: Ten things to solve for

Source: PwC, *Sizing the prize What's the real value of AI for your business and how can you capitalise?*



# Support a reduction in local business supply chain costs



## Rebalanced supply chains

Cost differences among developed and many developing countries are narrowing due to technological advances. The importance of local supply to offset disruptions, freight costs and improve national security is increasingly important.

Consumers have shown willingness to adapt spending during the pandemic to 'buy local'. Businesses have demonstrated the capability to transform production or scale up to new demand.

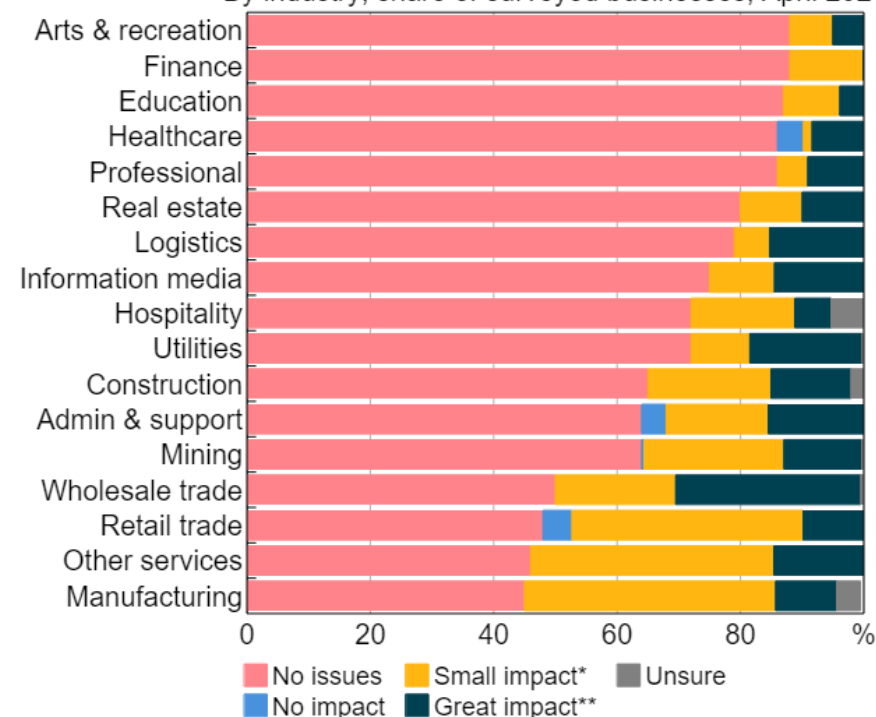
The strong manufacturing, wholesale and transport sectors in Charles Sturt will increase opportunities for new logistics activities as well as potentially reduce costs for companies that rely on high value small quantity inputs.

### Implication

- Identify mechanisms to support businesses that will continue to face cost pressures due to supply chain constraints
- Explore the establishment of platforms or networks to link local businesses along supply chains
- Identify opportunities for import replacement
- Support adoption of technology and automation by local businesses to reduce labour costs thereby making onshore production of components more competitive.
- Identify opportunities for businesses that rely on high value per unit or time-sensitive commodities. E.g. pharmaceuticals, production samples, electronics consumer goods, and perishable agricultural and seafood products.

## Reports of Supply Chain Issues

By industry, share of surveyed businesses, April 2021



\* E.g. some delays but little impact on revenue

\*\* E.g. major delays or cannot obtain certain items; significant impact on revenue

Sources: ABS; RBA

Source: RBA, Statement on Monetary Policy – May 2021 Box B: Supply Chains During the COVID-19 Pandemic

# Support initiatives to grow circular economy businesses



## Circular economy

A 'circular economy' has been identified as a major (up to \$4.5 trillion) commercial opportunity with the concept that everything, even after its 'useful' life, can become a source for something else.

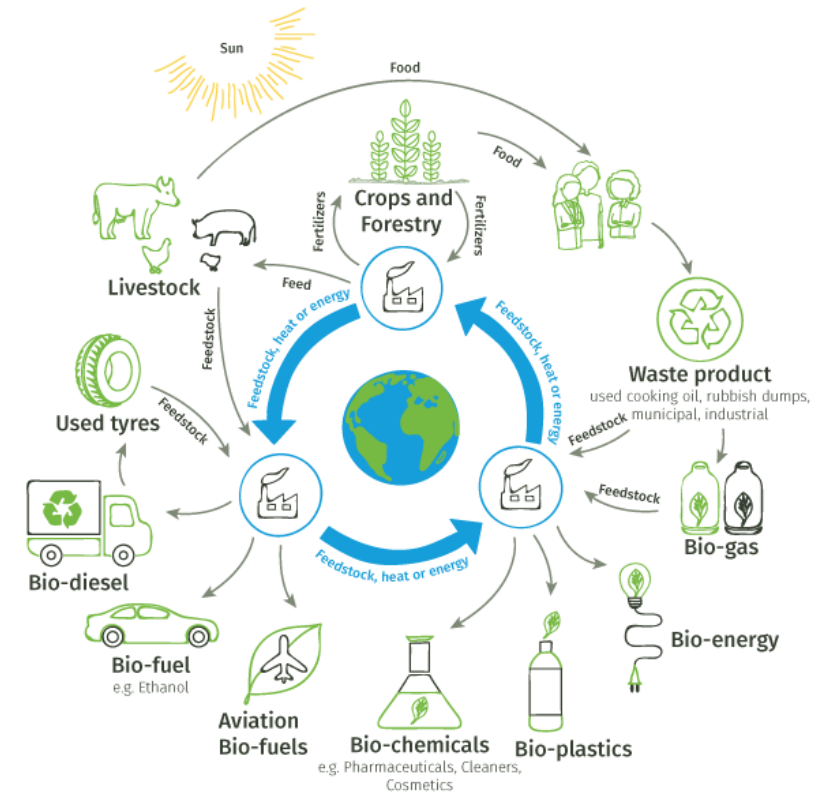
Waste export restrictions are driving federal and local investment in waste reuse solutions. The City of Charles Sturt has initiatives under the Living Green to 2020 plan to support waste and sustainability. A Materials Recovery Facility was constructed in 2021 in partnership with the City of Port Adelaide Enfield to process recycled materials for reuse. Also, the Bowden development includes leading green initiatives.

However, there is major potential in other areas such as plastics, organic waste, e-waste, lithium batteries etc. Closed loop or bio-industrial precincts that generate fuel/energy from waste are also attracting investment.

### Implication

- Identify mechanisms to support and educate businesses to reuse waste material in a cost effective manner.
- Explore opportunities for the establishment of a bio-based precinct in the region and how to attract an anchor tenant.
- Identify opportunities for collaboration between council and businesses to take better advantage of government run waste facilities.

## Key industries to benefit from AI impacts



Source: Aurecon, *The Circular Economy: the bioprecinct approach and showcase on the Mackay Isaac Whitsunday region*



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# APPENDIX 2



The City of Charles Sturt

# ECONOMIC DEVELOPMENT STRATEGY 2022-26



Creation  
Attraction  
Retention  
Expansion



A man with a beard and glasses, wearing a white hard hat and a high-visibility yellow vest over a black long-sleeved shirt, is performing a smoking ceremony. He is kneeling on a concrete surface, using his hands to place green herbs and small branches into a long, narrow wooden tray. A fire is burning within the tray, and smoke is rising from it. The background is a bright yellow wall.

## Acknowledgement of Country

Ninna Marni is Kurna for 'Welcome'. The City of Charles Sturt acknowledges and pays respect to the traditional custodians of the land, the Kurna people of the Adelaide Plains.

We pay our respect to Elders past, present and emerging. We respect their spiritual beliefs and connections to land which are of continuing importance to the living Kurna people of today.

We acknowledge the contributions and important role that Aboriginal people continue to play within our local community in Charles Sturt. We also pay respects to the cultural authority of Aboriginal people visiting from other areas of South Australia and Australia.

Cleansing Smoking Ceremony at Ngutungka construction site with Jack Buckskin and associates.

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# Mayor's Foreword

We have refreshed our Economic Development Strategy which was previously developed in 2020 to meet the needs of our community impacted by COVID-19.

Our City is a diverse, vibrant and friendly place to live. We are a community that values our rich tapestry of people, ideas, perspectives and experiences. From within our country and across the world, people have made the City of Charles Sturt their home, bringing colour and flavour together in harmony, creating a place that means the world.

People choose to live, work and do business in our City because of our liveability, supportive business environment and great transport links. Major urban renewal projects have provided jobs and housing, and our pristine beaches and vibrant places continue to attract visitors all year round.

We have over 9,000 businesses in our City, and over the last two years our economy has proven its resilience. However, there are challenges that need to be addressed to realise our growth opportunities whilst maintaining our city as a vibrant and attractive place offering our community the lifestyle they enjoy.

The City of Charles Sturt Economic Development Strategy (EDS) has been developed collaboratively with input from local businesses, industry representatives and other key stakeholders to guide our Council and deliver our vision to ensure long term sustainable and inclusive growth for our community.



We can't deliver this alone; collaboration and partnerships will be key to our success in implementing this strategy and we will continue to work with our communities to identify new opportunities.

**Angela Evans**  
Mayor, City of Charles Sturt



# Executive Summary

This strategy captures the ideas, thoughts and aspirations of our business and community leaders to build upon our strong foundations and capitalise on new and emerging opportunities to deliver long-term, inclusive and sustainable growth.

Located between the capital city, Adelaide, and world class beaches, our City is a diverse, vibrant and friendly place to live.

Offering an enviable lifestyle and a healthy and diverse local economy our region boasts of national standard sporting and entertainment facilities, vibrant restaurants and cafés and a variety of shopping precincts. Stunning walking and cycling trails provide an opportunity to relax and unwind whilst rail and transport links provide convenient access to Adelaide, the Airport, and Outer Harbour passenger and freight terminals.

Growth has been driven by key sectors including health, manufacturing, construction and tourism. A further \$21 billion of major development and infrastructure projects over the next 10 years in the Western Adelaide region will deliver 34,000 direct jobs and 50,000 supply chain jobs to drive future economic growth.

The decline in industrial sectors has meant our economic performance has been reliant on its population for jobs growth making it exposed to emerging forces.

However, focusing on our key growth sectors will provide the complexity for economic growth and deliver sustained economic benefits for residents and businesses now and into the future.

## Creating our future economy

This Strategy sets out our vision for the economy of the City of Charles Sturt and the strategies and actions to achieve that vision.

It is an overarching framework that guides the City's economic development initiatives and articulates our role, priorities and approach. It provides the rationale for engaging with identified priority sectors and delivering outcomes through detailed Action Plans.

It recognises that the environment and economic productivity are intrinsically linked and that by enabling everyone to contribute to, and benefit from, economic growth will deliver greater prosperity and equity across the city. Our Council is therefore focused on economic, social and environmental outcomes.

Showcasing our city as a premier business and visitor destination and attracting value-adding industries will be important to reduce our reliance on population growth and provide jobs for our residents, but this will be done in a sustainable way to maintain the lifestyle our community expect.

Our new vision will ensure that we continue to work with our business community, build their capability, and support local knowledge and innovation.

## VISION

The City of Charles Sturt is recognised as a vibrant, liveable and business friendly city with a diverse and advanced economy that supports knowledge and innovation.



## 1. Introduction

### What is Economic Development?





## What is Economic Development?

Economic Development is the creation of wealth from which community benefits are realised. It is more than a jobs program, it's a deliberate intervention in growing an economy and enhancing the prosperity and quality of life for its community. Sustained and inclusive economic growth can drive progress, build a resilient and vibrant community, create jobs and improve living standards.

Local economic development can be improved by:

- Business Creation – encouraging the growth of new businesses
- Business Attraction – attracting new business
- Business Retention – supporting existing businesses
- Business Expansion – enhancing existing businesses

Economic development initiatives can be wide ranging and vary in scale. They can include direct support and training for local business through to the major improvements in places to make them more attractive for businesses and the community.

A healthy economy improves our quality of life, increases our job opportunities and supports social and cultural activities. However, economies evolve and change over time and understanding these changes, the processes and their outcomes provides the basis for economic development strategies.

---

### Council's role in Economic Development

Council plays a pro-active role in economic development, as facilitator, partner, promoter, information provider and advocate to create a resilient, sustainable and prosperous local economy.

The primary areas of action in Council's economic development approach includes:

- Business engagement through events, workshops, grants, communication channels newsletters, industry associations and asking for feedback.
- Business support through the delivery of programs, services, training and grants.
- Marketing and promotion encouraging investment and visitation through showcasing the region and business opportunities.

**The Economic Development Strategy (EDS)** supports one of five key themes within the City of Charles Sturt's Organisational Plan to deliver the goal of an economically thriving City and it supports Our Community Plan's vision by delivering economic outcomes.

## Where does this strategy fit in with council plans?

**Our Community Plan 2020-27** is our overarching aspirational strategic plan that sets the vision for our community and organisation of a leading, liveable city.



**Our Organisational Plan 2020-24** is the four-year plan that translates Our Community Plan aspirations into actions. Our Economy is one of five themes in the plan and includes bringing energy and vibrancy to the economic recovery, promoting economic development of the Western Region and supporting local businesses and local supply chain.

## Western Regional Development Approach

A regional approach was adopted in 2015 to promote the region as a great place to live, work, play and invest. Our Western Alliance\* reduces duplication, encourages the sharing of resources, and provides a unified approach to economic development. This enabled us to mobilise a coordinated and rapid response at the onset of the COVID-19 pandemic to provide business support and information through a Business Support Helpline and webinar series facilitated by the Adelaide Business Hub. We are committed to continue this approach to benefit our businesses and leave a legacy for the future of our region.

As a result of this collaboration, we have:

- stronger relationships and improved business engagement through a range of networks including the Western Business Leaders.
- a regional approach to small business support including the roll-out of the Digital Solutions Program by Adelaide Business Hub.
- the Development of the Western Adelaide Regional Tourism Plan and creation of the Adelaide Beaches regional brand and visitor website [www.adelaidebeaches.com.au](http://www.adelaidebeaches.com.au).
- the Development of a 2021 Building Western Adelaide Strategy and Action Plan.

*\*A collaboration with the Cities of Charles Sturt, Holdfast Bay, Port Adelaide Enfield and West Torrens.*

**Western Region Tourism Destination Action Plan\*** - an overarching collaborative approach to attracting visitors to Western Adelaide.

**Building Western Adelaide Strategy and Action Plan 2021 -24\*\*** - an overarching collaborative approach to economic development across the Western Region. It has the following five key focus areas:



\*\* See the plans via [charlessturt.sa.gov.au/business/invest-in-the-west](https://charlessturt.sa.gov.au/business/invest-in-the-west).

**The Economic Development Strategy (EDS)** supports one of five key themes within the Organisational Plan to deliver the goal of an economically thriving City and it supports Our Community Plan's vision by delivering economic outcomes.

**Strategic Framework of the EDS** - The EDS presents an overarching four-year strategy and action plan to provide direction for economic development in the City of Charles Sturt. To support the implementation of this strategy a 12-month rolling economic development action plan has also been developed highlighting the individual actions required to deliver on this strategy.

**Economic Development Recovery Strategy 2020-22** was an 18-month action plan to guide the recovery from the COVID pandemic. The action plan focused on bringing energy to the recovery and highlighted Council's role in leading and facilitating the recovery and repositioning approach for the business community. A key element of this was a proactive approach to business engagement and positive messaging to instil business confidence. Further detail on Council's COVID recovery response and stimulus package are included in Chapter 4.

**Profile ID - Trends and Forecast Report** – was undertaken in order to better understand the current economy and where it is heading in the next five years. Further details of this report are included in Chapter 4.

**Business Survey** – was undertaken to better understand the needs of business. Further details of this are included in Chapter 3.



Visitors enjoying the beach foreshore

## The Action Plan

The action plan is structured under the four pillars with a 12-month action plan (to be reviewed on an annual basis) and a four year plan. *Both can be found in Appendix 2.* As part of the action plan, measures of success have been created to enable us to track the effectiveness of the economic development program.

### The measures of success include:

- Satisfaction with Council's level of support for business and perception that Western Adelaide is an ideal place to invest to grow a business.
- Growing employment and investment
- An increase in business start-ups.

### Strategic Pillars

The Economic Development Strategy has four pillars with a range of initiatives to guide the future economic development efforts.

- Business Friendly
- Diverse and Advanced Economy
- Knowledge and Innovation
- Vibrant and Liveable City

The initiatives have been shaped by the opportunities and challenges highlighted in:

- the *City of Charles Sturt Economic Trends and Forecast* findings,
- what local businesspeople and stakeholders told us in the *Business Climate Survey 2022* and
- through ongoing engagement.

### Growth Sectors

Four key **growth sectors** have been identified that are high value-adding and provide the complexity for future economic growth, these include:

- Urban Development
- Tourism
- Health
- Defence and Advanced Manufacturing

Our small business community represent an important part of our community. They are recognised throughout this strategy and are supported by a number of key actions.



## 2. Charles Sturt and the Western Adelaide Region

The City of Charles Sturt has a healthy and diverse local economy, enviable and vibrant living environment with world class local beaches where you can relax and unwind, walking and cycling trails where you can get back to nature, bespoke café and shopping precincts, national standard sporting and entertainment facilities. All accompanied by convenient access to the City, Adelaide Airport, Outer Harbour – passenger and freight terminals and the Osborne Naval Shipbuilding Precinct.

The following maps outline the key economic development and liveability features and assets in the City of Charles Sturt and the Western Adelaide Region.





MAP 1 - ECONOMIC DEVELOPMENT ASSETS

Gig City Sites



- Healthy Living Precinct, Welland
- Sunjive Studios, Hendon

Hospitals



1. Queen Elizabeth Hospital, Woodville
2. Western Hospital, Henley Beach

Major Development



- Bowden Village
- West, West Lakes
- The Square, Woodville West

Employment Lands

1. Royal Park
2. Athol Park & Woodville North
3. Hendon & Woodville
4. Beverly
5. Hindmarsh & Croydon





## MAP 2 - LIVEABILITY FEATURES

### Caravan Parks



1. Discovery Parks Adel Beachfront Semaphore Park
2. West Beach Parks

### Golf courses



1. West Lakes Golf Club
2. Grange Golf Club
3. Royal Adelaide Golf Club

### Sports Centres



1. Adelaide 36ers Arena
2. Hindmarsh Stadium
3. St Clair Recreation Centre

### Key Visitor Precincts



1. Semaphore Park
2. Grange Jetty Precinct
3. Henley Square and Jetty
4. Plant 4, Bowden



### Entertainment Venues



1. Woodville Town Hall
2. Entertainment Centre
3. Holden Street Theatre
4. The Gov

### Major Shopping Centres



- Findon Shopping Centre
- Fulham Gardens Shopping Centre
- West Lakes Shopping Centre
- Arndale Shopping Centre
- Welland Shopping Centre

## GROSS REGIONAL PRODUCT



**\$6.03 B**

## LOCAL JOBS



**46,743**

Source: NIEIR 2021

## EMPLOYED RESIDENTS



**60,639**

Source: NIEIR 2021

## NUMBER OF BUSINESSES, 2021



**9,478**

Source: ABS 2021

## TOP 5 INDUSTRIES - CONTRIBUTION TO THE ECONOMY



Source: NIEIR 2021

## TOP 5 INDUSTRIES - EMPLOYMENT



Health Care and Social Assistance  
8,781 Jobs (18.8%)



Construction - 6,033 (12.9%)



Retail Trade - 5,487 Jobs (11.7%)



Manufacturing - 4,914 (10.5%)



Education & training - 3,699 (7.9%)

Source: NIEIR 2021

## POPULATION AND FORECAST



**2020 120,733**

**2036 138,292**

Source: ABS ERP 2020/ PlanSA 2020

## URBAN DEVELOPMENT - VALUE OF BUILDING APPROVALS

Annual 2020/21

**RESIDENTIAL**

**\$341.8M**

**NON-RESIDENTIAL**

**\$407.2M**

Source: ABS 2021

## TOURISM



**JOBS 2,526**

(5.4% of jobs)



**OUTPUT**

**\$359M**

**VALUE ADD**

**\$194M**

Source: 2021/20 data NIEIR 2021



### 3. How Do Businesses Feel About the City of Charles Sturt?



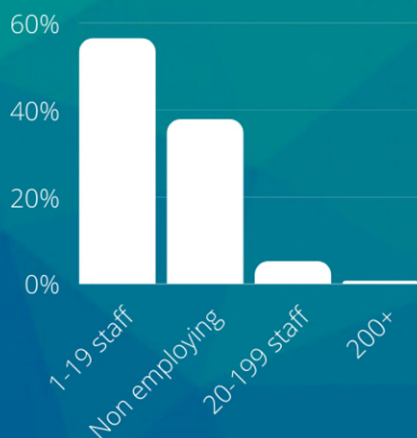


# BUSINESS CLIMATE SURVEY - 156 RESPONSES

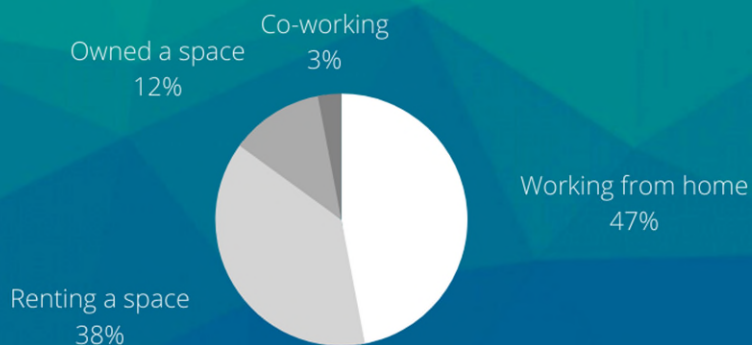
92.3% of responses were from businesses located across the City

66 sectors

## ABOUT BUSINESSES IN THE CITY OF CHARLES STURT



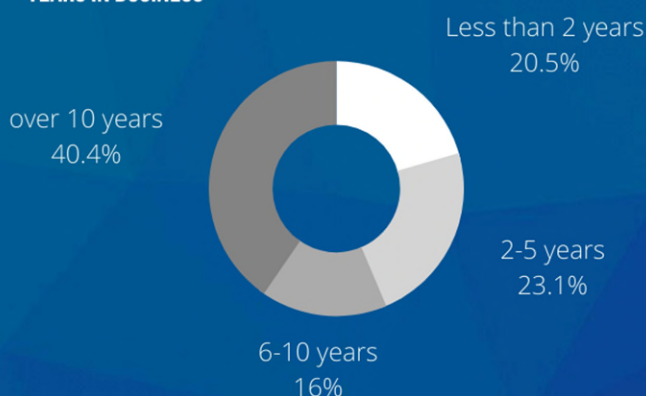
## PREMISES



## EXPECTED STAFF NUMBERS



## YEARS IN BUSINESS

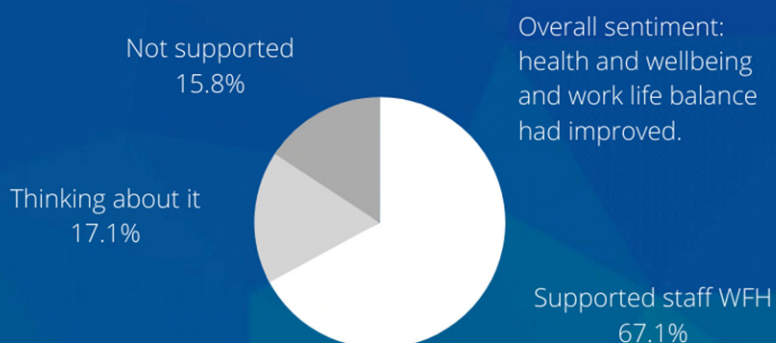


## EXPERIENCE WORKING WITH COUNCIL

27 businesses out of 156 had not yet worked with us.



## STAFF WORKING FROM HOME (WFH)



## BUSINESS KNOWLEDGE OF COUNCIL SERVICES

**54%** Aware of council grants

**61%** Aware of Western Business Leaders

## HOW COUNCIL CAN SUPPORT BUSINESS GOALS, THE TOP FIVE RESPONSES



## WHAT IS IMPORTANT TO OUR BUSINESS



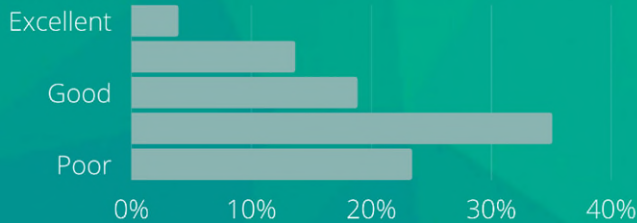
- Developing an online presence
- Growing your business
- Access to grants and funding
- Managing energy and utility costs

## WHAT IS IMPORTANT TO OUR BUSINESS

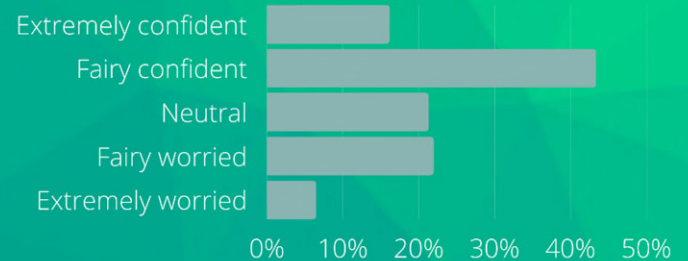


- Digital marketing
- Business & financial planning
- Strategic planning
- Tender and grant writing

## LOOKING BACK ON 12 MONTHS OF BUSINESS PROFITABILITY



## LOOKING TO THE FUTURE - CONFIDENT OR WORRIED ABOUT THE FUTURE



## INNOVATION

**66.5%**

are looking for ways to innovate, mainly through online presence, streamlining, searching for improvement strategies & ideas for growth

## OTHER IDEAS TO EXPLORE



- Local businesses to be promoted
- Discounts to be applied to council charges for businesses who have been restricted to trade during COVID-19.
- Access to Council networks and contacts to facilitate marketing
- Co-working spaces

## SUSTAINABILITY

**53%**

- are looking for ways to become more environmentally friendly
- Achieving net zero through improvements and offsets
- Recycling, reducing packaging/creating new sustainable packaging for online sales
- Energy efficiency/ Solar power
- Going paperless
- Hybrid vehicles

## \*EXPORTING



- 95% respondents do not currently export
- 2.5% of business respondents were considering exporting with more training\*

## BEING A PART OF THE CITY OF CHARLES STURT



- 78% said liveability
- Supportive business environment
- Central location
- Good transport links which allowed access to markets



Parking, rubbish, lengthy developments, limited public transport and drug & alcohol issues.

## HOW COUNCIL CAN SUPPORT BUSINESS GOALS? - OTHER



It was felt that Council could prioritise purchasing from local business



Planned program of events and activities developed that bring people to the region and include local business.



A local business directory



Road works to be scheduled at non-peak periods of the year



## How do Businesses feel about the City of Charles Sturt?

Earlier in 2022 we conducted the **City of Charles Sturt Business Climate Survey 2022** to find out more about the businesses that operate in our city. We asked owners and operators in the City of Charles Sturt a range of questions to understand how we can better support their business.

156 responses were received to our business survey (92.3% of these were from businesses located across the City) from 66 different sectors.

A summary of the key findings is included in the following pages.



#### 4. Economic Trends and Forecasts





## Economic Trends and Forecast

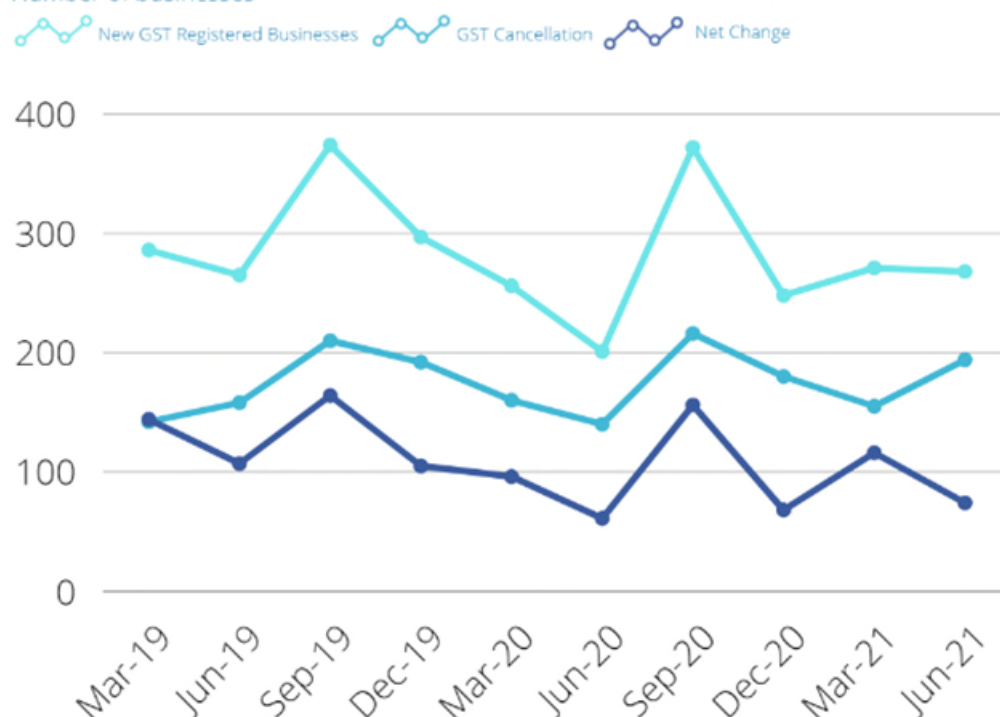
To inform the preparation of this Economic Development Strategy and Action Plan an in-depth analysis of the current and forecast economic trends was undertaken. The identification of issues and opportunities has helped to shape the action plan and level of priority. Informed Decisions (ID) were engaged to undertake the analysis, the full report is available in Appendix 1. A summary of the key issues, challenges and opportunities are outlined below.

The City has been growing strongly, more than the Greater Adelaide average over the last decade. However, whilst there continues to be opportunities, the economy has been substantially impacted by government enacted restrictions to control the spread of the COVID-19 pandemic since March 2020.

The ID report focuses on the period from 2016 to 2020 to assess recent economic performance, growth drivers and competitive advantages. It assesses the immediate impacts and recovery from the COVID-19 pandemic; the likely future economic outlook from 2021 to 2026 and the forces that will influence future growth; and concludes with long-term economic challenges and opportunities.

### BUSINESS ENTRIES AND EXITS - CITY OF CHARLES STURT

Number of businesses



Source: ABS 2021



## Current Economic Trends

In 2019 and 2020 the economy was adversely impacted by external forces. After low growth in 2019 and a hard fall in 2020, Charles Sturt's economy rebounded in 2021. In 2021, the economic activity in Charles Sturt started to recover from the impacts of the weak South Australian economy in 2019 and the outbreak of COVID-19 in 2020.



**Large jobs fall in population services and transport industries.** Household consumption and business investment decreased due to the slowdown in the state economy and the outbreak of COVID-19. This meant that jobs decreased in population services, manufacturing and goods transport industries.

**The slowdown in economic growth highlights key challenges faced by the Charles Sturt economy.** The Charles Sturt economy faces challenges in generating higher jobs growth to match its growth in population. The recent slowdown in jobs growth highlights several challenges:

- **Reliance on population for job growth:** Following the decline in industrial sectors, Charles Sturt's economic performance is reliant on its population. This drives demand for local health, retail, hospitality, service industries and residential construction activities.
- **Exposed to emerging forces:** City of Charles Sturt's reliance on the population to grow its economy makes it exposed to a range of forces such as the shift to online shopping (retail), government spending (health sector) and more recently COVID-19 (services).
- **Decline in specialised manufacturing industry.** The sector remains a major job and economic value generator as well as major exporting industry with potential to grow beyond the population limit. However, the industry is at risk and needs support to maintain competitiveness.

The key risks include:

1. Low labour productivity compared to the nation as a whole especially in food product, paper and pulp, transport and machinery equipment manufacturing. Value can be grown through Industry 4.0.
  2. Globalisation and low price competitiveness from high AUD\$.
  3. Supply chain impacts and increasing input costs squeezing the profit margins.
- **Large mismatch in jobs:** The low jobs growth has increased the mismatch between local jobs and resident workers' skills and qualifications. This has resulted in our resident workers looking for higher income and skilled jobs outside of the City.

## Economic Forecast

An analysis of the future economic outlook from 2021 to 2026 has been undertaken to identify the challenges and opportunities. These are further detailed below.

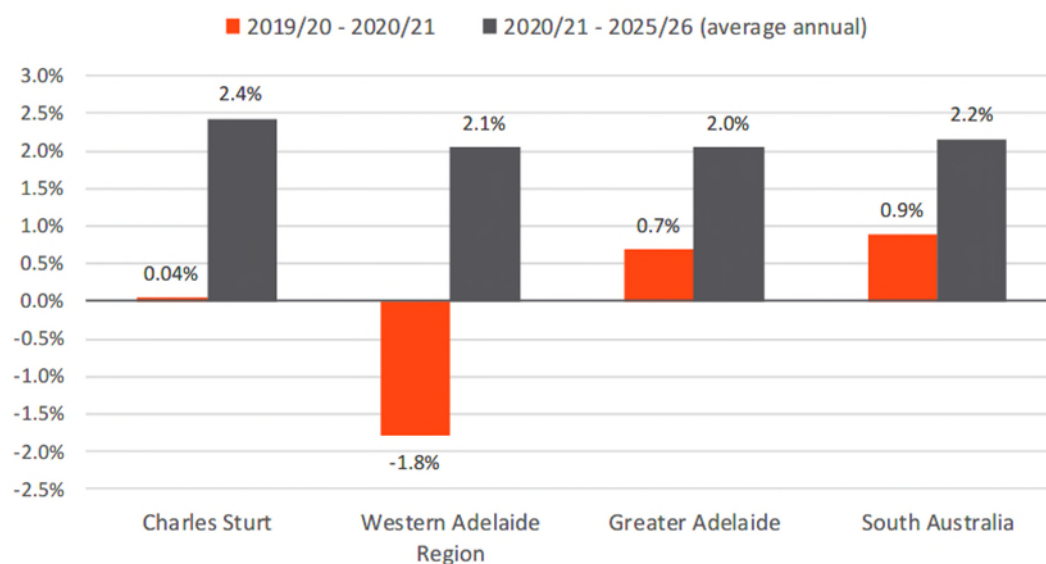
### Jobs deficit forecast to remain

Jobs growth in the next four years to 2026 is forecast to be 2.4% per annum, higher than the pre COVID-19 growth rate. This growth rate will not close the gap between the local jobs available and the number of working residents given the strong population growth forecast in Charles Sturt.

The jobs growth forecast when benchmarked against the region, Greater Adelaide and the State is predicted to experience higher annual growth between 2020/21 and 2025/26.

### Jobs Forecast - Charles Sturt

Average annual growth rate, %



Source: NIEIR, 2021; adjusted to 2022

### Forecast continued reliance on population for jobs growth

Over 86% of the jobs growth from 2021 to 2026 is forecast to be from population serving industries: health, hospitality, education and other services.

### Increase in demand for professional occupations and higher qualifications

The forecast estimates a strong increase in professional or community / personal service occupations and the greater demand for workers with higher qualifications in the next five years.

## Occupation Demand Forecast - Charles Sturt 2020/21 to 2025/26

Persons



Source: ABS Census 2016; NIEIR, 2021

### Preserving Employment Lands for Future Growth

The forecast growth in jobs will be limited if it is not matched by a comparable growth in commercial and industrial space. Development of commercial office space in key employment areas, new or enhanced existing white-collar precincts (e.g. hospitals), and the protection of appropriate industrial areas is required.

Losing employment land due to the continued redevelopment of industrial and vacant land for residential development, will constrain economic growth. This will also impact existing manufacturing, wholesale and construction service operations.

## Pandemic Recovery - Challenges and Opportunities

Recovery from the pandemic will present new and accelerate long term challenges and opportunities.

Challenges	Opportunities
<p><b>Substantial job deficit in knowledge-based business service industries</b> due to lack of jobs and larger commercial enterprises. The City lacks commercial office space to drive growth in professional and business services.</p> <p><b>New technology may increase automation</b> which places lower skilled working residents at risk of job losses.</p> <p><b>Population growth driven by seniors and elderly</b> will increase demands for assistance and aged care workers.</p> <p><b>Health/aged care growth may contribute to lower productivity</b> going forward unless higher value services are focused on.</p> <p><b>International travel restrictions limit international visitation</b> and reduce the potential length of stay of visitors.</p> <p><b>Low levels of digital literacy in small</b></p>	<p><b>A strong non-residential building and infrastructure projects pipeline will support economic activity</b> over the coming years.</p> <p><b>Continued revitalisation projects</b> such as Bowden Village and the West Development, West Lakes have the potential to <b>attract commercial investment</b> from white collar industry areas and <b>diversify the economy</b>.</p> <p><b>Intensifying the development of employment hubs across the City</b> have the potential to <b>attract new businesses</b> and/or inner metro relocations as well as tap into benefits from agglomeration spill overs.</p> <p><b>Population ageing and new health and aged care facilities</b> (e.g. TQEH redevelopment) will help further <b>growth in the Healthcare industry</b>.</p> <p><b>Climate change influencing investment decisions</b> means that access to infrastructure (e.g., electric car charging stations), renewable energy storage systems and optimisation of low emission transport networks across the City will become increasingly important.</p> <p><b>New technology such as AI (Artificial Intelligence) and 5G connected systems</b> have the potential to substantially <b>grow the value of advanced manufacturing, defence and construction related areas</b>, as well as generate new opportunities.</p> <p><b>Supporting local retail and providing incentives for new co-working facilities</b> may keep skilled residents and remote workers in the City.</p> <p><b>Helping business transition to online and e-commerce platforms</b> will assist businesses attract</p>

**businesses** may be negating the potential to grow sales/market beyond the City limits.

**Our workforce is averagely educated** which may limit industry growth and development.

customers that are increasingly shopping online and supporting growth in Charles Sturt's specialised wholesale trade industry.

**Support strengthening local business supply chains and buy local initiatives.** Opportunities include exploring the establishment of platforms or networks to link local businesses along supply chains – buy local. Supporting adoption of technology and automation by local businesses to reduce labour costs thereby making onshore production of components more competitive.

**Support initiatives to grow circular economy businesses.** Opportunities to support and educate businesses to reuse waste material in a cost-effective manner to reduce waste and use of primary resources. Opportunities for collaboration between council and businesses to take better advantage of government run waste facilities to reduce, recycle and reuse materials.

**The Accommodation and Food Services sector is set to experience significant jobs growth.** Opportunities to broaden the pool of domestic sourced workers, maximise the returning international workforce and increase engagement with training.



Phil Scardigno, Managing Director/Founder CleanLIFE, CleanLIFE Medical and The Hygiene Co.



## City of Charles Sturt's COVID Economic Recovery Response

The COVID-19 pandemic caused global disruption in March 2020 when travel and business restrictions were brought into action by the Commonwealth and SA Governments. Local businesses in the hospitality, tourism, retail, personal services, arts and culture, sport and recreation businesses were particularly impacted.

Council rallied around local business to provide support and assistance, launching a business support helpline and releasing an Economic Support and Stimulus Package (ESSP) in May 2020 to assist and bring energy to the recovery. The \$99 million ESSP, delivered over two financial years, included the following:



Council is committed to supporting businesses in the recovery from the pandemic, the ongoing business support and art and culture grants have and will continue to target the sectors that have been most impacted and will take the longest to recover. The 10 percent buy local initiative to support local businesses to supply goods and services to Council is an ongoing commitment to support local businesses. The other actions in this strategy will further assist the recovery and help to build the resilience of our business community and the local workforce.



## 5. Strategic Framework



## Strategic Framework

The strategy has four pillars with a range of key initiatives to guide the future economic development efforts. The initiatives were informed through background research and stakeholder engagement.

### Vision

The City of Charles Sturt is recognised as a vibrant, liveable and business friendly city with a diverse and advanced economy that supports knowledge and innovation.

**Goal:** An economically thriving city

### Pillars

The Economic Development Strategy has four pillars with a range of key initiatives to guide our future economic development efforts:



## Growth Sectors

Four key growth sectors have been identified that are high value-adding and provide the complexity for future economic growth, these include the following.



Small business growth is another key sector which applies across the four growth sectors and the importance is further outlined below.



## Urban Development

Significant major urban developments are underway in the City of Charles Sturt which are leading the way in creating new and innovative living environments, promoting housing diversity, liveability and sustainability. The Bowden development is redefining urban living with contemporary apartment living using innovative, green designs within a vibrant community on the fringe of the CBD. The West development is nestled between the Grange Golf Club and the waters of West Lakes on the repurposed Football Park land. Both are examples of high quality, medium to high density development. Redevelopment of ageing Housing SA sites, The Square at Woodville West, provide further opportunities for urban renewal and affordable housing close to public transport.

Our city has a diverse range of urban employment areas that accommodate a diverse mix of industrial, commercial and advanced manufacturing businesses. Protection of these prime areas from residential development is crucial, as their regeneration and promotion presents an opportunity to attract inward investment and provide local jobs growth.

Beyond the major development sites urban development opportunities are more challenging to deliver. The 30 Year Plan for Greater Adelaide Strategic Plan promotes a green liveable city, greater housing choice, walkable neighbourhoods and sustainable transport use. At a local level the Your Neighbourhood Plan project is delivering urban renewal to established suburbs that will benefit from upgraded public infrastructure and will seek to leverage private investment to achieve the liveability goals of the 30 Year Plan.

Our city has a wide variety of exciting residential, commercial, industrial and infrastructure projects that are in the pipeline over the next 10 years. The Western Adelaide region has over \$21 billion in major projects underway or in the pipeline over the next 10 years. The projects will deliver over 34,000 direct jobs and over 50,000 supply chain jobs. The construction sector is forecast to experience the largest level of growth in output over the next five years, \$403 million<sup>1</sup>.

<sup>1</sup> City of Charles Trends and Forecast Report 2022.

Plant 3 & 4, Bowden





## Tourism

Tourism makes a significant contribution to the City of Charles Sturt economy and presents an opportunity to benefit a number of key sectors across the local economy. In 2019/20 the total value of tourism and hospitality sales in the city was \$358.9 million<sup>1</sup>.

Collaborating and promoting tourism as part of the Western Region provides an opportunity to develop and grow tourism employment and visitor spending. Events also play a major role in attracting visitors to our city and extending their stay.

Our region boasts national standard sporting and entertainment facilities as well as creative industries which are connected to future urban growth, investment and employment generation.

Showcasing our city as a vibrant and attractive place offering an enviable lifestyle presents an opportunity to attract a younger demographic and families to ensure future sustainable growth and investment.

Our tourism operators enjoy the opportunity to collaborate through the Western Adelaide Visitor Network and the Adelaide Beaches Visitor website is a key driver in promoting all there is to see and do in the region to a global audience. The Visit Henley Website and Facebook page draws and engages a large local audience.

The COVID-19 pandemic has significantly impacted the visitor economy. Visitor businesses have shown their resilience and ability to reposition by embracing the opportunities from local and regional visitors.

The Accommodation and Food Services sector is forecast to experience significant jobs growth, 989 jobs in the next five years as the second highest growth sector behind Health and Social Assistance.

However, the South Australian Tourism Commission's Tourism Workforce Directions Paper has highlighted some of the key challenges in attracting workers back to the sector.

This paper identified several strategic priorities to guide the recovery of the sector and employment growth which included the following:

- broadening the pool of domestic sourced workers
- maximising the returning international workforce
- increasing engagement with training
- ensuring optimal working conditions

<sup>1</sup> City of Charles Sturt Trends and Forecast Report 2022



## Health

Health Care and Social Assistance is the largest employment sector in the City of Charles Sturt, comprising 18.5 percent of all jobs and exporting 25 percent of its output<sup>1</sup>. Our City has health clusters located along Woodville Road, around the Queen Elizabeth Hospital and the Welland Healthy Living Precinct. The Royal Adelaide Hospital in close proximity to the Council area presents a further opportunity to grow the local health sector.

The Health Care and Social Assistance sector sits in the 'growing' category and is an important driver of future growth. The sector is forecast to be the largest jobs growth sector with over 2 600 jobs being created and the second largest growth sector by output over the next five years with growth of \$220 million<sup>2</sup>.

The forecast health industry growth provides an opportunity to explore higher value health services and medical technology development opportunities. This can be linked to the NDIS growth opportunities that are available for small to medium allied health businesses focusing on emerging services and technologies including home-based care and tele-health.

The \$314 million redevelopment of the Queen Elizabeth Hospital will modernise the hospital through the delivery of a larger emergency department, a new intensive care unit, operating theatres

and rehabilitation facilities. Construction is estimated to provide 470 jobs during construction and is expected to be completed by mid-2024. The hospital is the centre piece of the Woodville Road Health Precinct which includes various health research and specialist services. This health precinct is a major local employer and has potential to grow and develop further.

The Welland Healthy Living Precinct provides multifunction and co-working spaces, a community café, training and seminar facilities along with a podcasting and recording studio. It provides collaborative spaces and a launch pad for start-up health and social enterprise businesses. Over 100 jobs have been created and employment is forecast to double in the next 12 to 18 months. The Welland Healthy Living precinct connects with surrounding allied health businesses including Arthritis SA, Novita Health and Adelaide Hydrotherapy to form a health cluster.

The precinct was also recently connected to the GigCity fibre network which provides an ultra-high speed fibre connection to other key innovation precincts including Lot 14 on North Terrace, Adelaide, Tonsley Innovation District and Sunjive Studios at Hendon.

<sup>1</sup>. City of Charles Sturt Profile, Remplan 2022.

<sup>2</sup>. City of Charles Sturt Trends and Forecast Report 2022



## Defence and Advanced Manufacturing

The Western Region is benefiting from the significant and sustained investment in the maritime defence projects including the Collins Submarine Sustainment Program, Hobart Class Ship refurbishment and construction of the Future Hunter Class Frigates. The plans for the construction and timing of the Australian Future Nuclear-Powered Submarines are yet to be announced following the formation of the AUKUS defence alliance between Australia, the United Kingdom and the United States.

The planned defence investment of over \$100 billion will see growth in skill development and employment opportunities that are multigenerational and will provide significant value and benefit to the region and wider State. The opportunities are not limited to the defence sector, there are a wide range of growth opportunities in the supply chain and consumption-based businesses.

Manufacturing plays a significant role in our economy. Almost 50 percent of economic value is related to manufacturing activities and the sector is a major driver of economic growth. Employment in manufacturing increased from 2016 to 2020, reversing the downward trend in the previous 10 years. Strong jobs growth was driven by the food product, polymer and rubber manufacturing sectors.

The Commonwealth Government's Modern Manufacturing Strategy seeks to promote Australia as a high-quality and sustainable manufacturing nation that helps to deliver a strong, modern and resilient economy for all Australians. The implementation of the strategy is backed by \$1.3 billion in spending over four years (2021-25), including support and grant funding for industry modernisation and supply chain resilience.

Advances in technology presents opportunities for local manufacturing businesses to modernise, grow and access new markets through the adoption of AI and 5G technology.



Detmold Group, Global innovators in sustainable paper and board packaging solutions

## Small Business

Small and Medium Enterprises (SME) are a critical component and makes a major contribution to the strength of our local economy.

98 percent of businesses in Charles Sturt employ 19 people or less providing local employment opportunities for people.

Not only do they help to stimulate economic growth but there are sustainability gains too. Local employment improves liveability and reduces the need to travel, it contributes to vibrant local places and diversity and elevates living standards by providing a variety of accessible employment options.

Small business owners typically live in the community in which they work and workers often shop locally helping to increase the economic health of the community.

The importance of small businesses is acknowledged and supported through a number of key initiatives in the action plan targeting business growth, development and support for start-ups and entrepreneurs.



Alice Fitch, Whola



## 6. Action Plan



Dion from Crave Coffee,  
Queen St, Croydon



## Action Plan

The action plan has been created to guide the economic development initiatives to support and grow local businesses and create employment opportunities. The initiatives have been shaped by the opportunities and challenges highlighted in the *City of Charles Sturt Economic Trends and Forecast* findings and what local business people and entrepreneurs have told us in the *Business Climate Survey 2022*.

The action plan is structured under the four pillars and is summarised in the table below. A 12-month action plan follows and will be reviewed on an annual basis. A four-year plan is included in Appendix 2.

### Economic Development Strategy Pillars and Principles

PILLAR	Business Friendly	Diverse and Advanced Economy	Knowledge and Innovation	Vibrant and Liveable City
KEYWORDS	Leadership, advocacy, collaboration, support, promotion	Capacity building, advancement, resilience, growth, connection, buy local, celebrate success	Innovation, entrepreneurialism, jobs and skills	Events, sustainability, creatives, liveability
PRINCIPLES	<ul style="list-style-type: none"> <li>• Understand the needs of our business</li> <li>• Advocate for business</li> <li>• Make it easy to start and grow a business</li> <li>• Embed economic outcomes into decision making</li> <li>• Cultivate community business leaders (business champions / ambassadors)</li> <li>• Champion the next generation of leading businesses, celebrate and promote our businesses</li> <li>• Be a business friendly Council.</li> </ul>	<ul style="list-style-type: none"> <li>• Support the growth of the City's key sectors</li> <li>• Build local business capacity and resilience</li> <li>• Support business retention and expansion</li> <li>• Facilitate business to business connections</li> <li>• Maximise expenditure locally</li> <li>• Celebrate our businesses and business success</li> <li>• Facilitate region building projects and investment into the city.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop the entrepreneurial capabilities of our residents and business people</li> <li>• Promote and support co-working spaces</li> <li>• Support the local innovation ecosystem</li> <li>• Encourage entrepreneurship, collaboration and innovation</li> <li>• Connect people to training and jobs.</li> </ul>	<ul style="list-style-type: none"> <li>• Showcase and promote the City as a premier business and visitor destination.</li> <li>• Promote the City as an ideal place to live</li> <li>• Facilitate the development of attractive and vibrant places and neighbourhoods</li> <li>• Attract events into the region</li> <li>• Lead and support environmental goals for sustainability, a growing circular economy and climate action.</li> <li>• Support the growth of the creative sectors.</li> </ul>

## BUSINESS FRIENDLY

The City of Charles Sturt is a city that understands the needs of business and is one of the easiest places to start and grow a business.

As a Small Business Friendly Council, we play an important part in supporting small business, our business responsive culture ensuring that entrepreneurs and business owners can access the assistance and support that they need.

Demonstrating strong leadership and advocating for key economic infrastructure is critical in enabling the right environment for investment, growth, and innovation.

Connection, capability, and collaboration will build our economy ready for the future.

Key themes: leadership, advocacy, collaboration, support, promotion.

### Key initiatives

- a. **Understand the needs of our businesses** via an annual business survey, through targeted business engagement, business surveys, open forum sessions with key industry sectors and associations and engagement with business leaders and ambassadors on key issues.
- b. **Advocate for business and key infrastructure** to create the right environment for growth and innovation.
- c. **Demonstrate strong leadership**, collaboration and partnerships across government, industry, and community to support business growth.
- d. **Demonstrate that Council is responsive to business** by making it easy to start, grow and access services.
- e. **Provide access and insights** into economic modelling, data and analysis for potential investors and local businesses.
- f. **Champion our community business leaders** to provide links to the key growth sectors, identify industry needs and provide representation at events.
- g. **Celebrate and promote business success by facilitating business excellence awards** to showcase leading local businesses.



Adam Bray, Westside Mushies  
and Amanda & Ali from Mia Piatto



Supporting our growth sectors is key.

Tourism will continue to make a significant contribution to our economy whilst Health Care and Social Assistance is an important driver of future growth. New technology such as Artificial Intelligence and 5G connected systems also have the potential to substantially grow the value of advanced manufacturing, defence and construction related areas.

However, protecting our employment lands and encouraging commercial and industrial development is critical for future growth. These will drive investment and enable knowledge-based business service industries, manufacturing, and wholesale industries, creating local jobs and a more dynamic local economy.

An important part of our economic recovery will be increasing the resilience of local businesses to economic and environmental shocks. Supporting existing businesses will enable them to build their capacity and capability, access new technology, markets and funding and will assist in business retention and expansion. Prioritising Council's expenditure with local businesses is important and will continue to be supported.

Key themes: capacity building, advancement, resilience, growth, connection, buy local, celebrate success

### Key initiatives

- a. **Support advanced manufacturing and defence sectors** by supporting: the uptake of technology, local supply chain capability, the uptake of grants and employment and training opportunities.
- b. **Grow and support the health sector** and cluster development.
- c. **Explore high value health services, med-tech and future NDIS growth opportunities** for SME's focusing on emerging services and technologies.
- d. **Support the growth and recovery of the visitor sector**
- e. **Build local business capacity and capability** through the delivery of workshops, events, and mentoring.
- f. **Connect local businesses to business support programs**, grants, investment opportunities and broader initiatives
- g. **Support business attraction, retention, and expansion.**
- h. **Encourage and facilitate business to business connections.**
- i. **Support Buy Local initiatives** to support the local supply chain, increase Council expenditure with local businesses and help businesses learn how to tender.
- j. **Facilitate region-building projects.**



## KNOWLEDGE AND INNOVATION

Education, skills, and entrepreneurship will drive innovation, productivity, and jobs growth.

Supporting education and skills and the development of precincts and spaces that encourage collaboration, networking and entrepreneurship is an important part of our economy.

Knowledge intensive jobs drive the innovation and productivity necessary for growth and keeping our skilled residents employed locally means fewer people commuting, improved social outcomes and more people shopping locally.

Investigating and supporting new co-working spaces and GigCity precincts offers an exciting opportunity to foster and grow innovation, entrepreneurship and attract businesses to the area.

Key themes: Innovation, entrepreneurialism, jobs and skills.

### Key initiatives

- a. **Develop the entrepreneurial capabilities** of our residents and digital literacy for business people.
- b. **Promote, support, and encourage co-working spaces** as places for collaboration and knowledge sharing. Investigate the potential for new co-working spaces and partnership approaches.
- c. **Investigate opportunities for additional GigCity precincts** to foster and grow innovation and attract businesses to the area.
- d. **Support the local innovation ecosystem and encourage entrepreneurship and innovation** – support programs and initiatives that develop the entrepreneurial capabilities of founders, new business start-ups and businesses with the potential to expand and scale.
- e. **Promote and create pathways to employment** through a coordinated workforce development agenda.



Healthy Living Precinct  
co-working space, Welland



The City of Charles is recognised as a great place to do business because of its liveability.

People move to a place that offers a lifestyle and environment they enjoy. Creating an attractive place for our community, investors and visitors is important.

Embedding place making and sustainability principles in Council, major developments and neighbourhood projects, ensures that our places meet the needs of our community. They also embrace our industrial, Aboriginal, and migrant heritage.

Events showcase our city, developing our sense of place and identity, and provide opportunities for people to connect with others contributing to both economic and community development. Events also play a major role in attracting visitors to our city and extending their stay. Creative industries are connected to future urban growth and investment and employment generation.

Promoting our city as a vibrant and attractive place offering the lifestyle they enjoy, and a mixture of residential developments will help attract a younger demographic and families to balance our ageing population.

Marketing the City will attract investors, businesses, and visitors to ensure a long-term sustainable future.

Key themes: events, sustainability, creatives, liveability.

#### Key initiatives

- a. Showcase and promote the city as a **premier business and visitor destination**.
- b. promote the city as an **ideal place to live**.
- c. **Attract events** and assist businesses to leverage from open access festivals to facilitate growth in visitation and spending.
- d. **Facilitate and promote attractive and vibrant neighbourhoods** by utilising neighbourhood plans, mixed use residential developments and creating boutique, bespoke areas.
- e. **Grow local creative industries** to support employment outcomes.
- f. **Lead and support environmental goals** for sustainability, a growing circular economy and climate action.
- g. **Connect local businesses to the Material Recovery Facility (MRF)** and promote the re-use of recycled materials.

## 12 Month Action Plan

### 1. Business Friendly

no	Initiative/Action	How	Measure	Target	12 month Action Plan Priority 1 Priority 2 Ongoing
A	Understand the needs of our businesses through targeted business engagement, business surveys, open forum sessions with key industry sectors and associations and engagement with business leaders and ambassadors on key issues.	Business engagement strategies: _ Open forums _ Business surveys _ Engagement with business leaders	_ No of businesses engaged _ No of open forum sessions _ No of Business surveys _ No of engaged Business Leaders and Ambassadors	80% satisfaction from Western region businesses participating in business development events (Org Plan)	Ongoing
B	Advocate for business and key infrastructure to create the right environment to enable business growth and innovation	Successful advocacy to key stakeholders e.g. Local Jobs Taskforce advocacy role - aged care workers add to the temporary or permanent skilled-migration lists, or introduce a new 'essential skills visa'.	Successful advocacy to key stakeholders		P2
C	Demonstrate strong leadership, collaboration and partnerships across government, industry, and community	Continue collaboration with Western Alliance, SATC, TiCSA, State, AHA, RC&A and GigCity	Delivery of collaborative projects and events		Ongoing
D	Demonstrate that Council is responsive to business by making it easy to start, grow and access services	Provide up to date information on the website.	Website analytics		Ongoing
		Business engagement strategies	Quality of business engagement through CRMS system	80% of surveyed businesses that received assistance and advice are satisfied with council support satisfaction	Ongoing
		Deliver welcome packs for new business.	Welcome packs delivered		P1
		Satisfaction surveys ongoing and annual	Report on satisfaction with Council	Positive net promoter score	Ongoing



no	Initiative/Action	How	Measure	Target	12 month Action Plan Priority 1 Priority 2 Ongoing
		Maintain Business Friendly Council status - annual reporting	Number of initiatives		Ongoing
E	Provide access and insights into economic modelling, data and analysis for potential investors and local businesses.	Provide information: _ website _ direct to investors _ through highlights and snapshots.	Website analytics No. of businesses assisted.  Remplan	Increase in web traffic	Ongoing
F	Champion our Community Business Leaders to provide links to the key growth sectors, identify industry needs and provide representation at events.	Leaders invited to events.	No. of events		Ongoing
		Promotion of local business excellence	Increased business confidence		Ongoing
		Business engagement to identify needs and receive industry insights.	Business engagement		Ongoing
G	Celebrate and promote business success by facilitating business excellence awards to showcase leading local businesses	Promote business success stories	Increased business confidence		P 1 / Ongoing
		Hold awards event	Business engagement in event awards		P2

## 2. Diverse and Advance Economy

no	Pillar/ Initiative	How	Measure	Target	12 month Action Plan Priority 1 Priority 2 Ongoing
A	Engage with partners and the business community to support and grow <b>Advanced Manufacturing and Defence</b> sectors by supporting: the uptake of technology, local supply chain capability, the uptake of grants and employment and training opportunities.	Engagement with partners and the business community to highlight support and opportunities available and build business to business connections.	No of partners and businesses engaged.  No of workshops, training, and networking events	At least one targeted industry specific communication and event annually	P1 / Ongoing
		Support the uptake of technology and building of supply chain capability	No of workshops, training, and networking events	80% satisfaction from Western region businesses participating in business development events	P2
		Promotion of Federal and State support and grants	Uptake of Federal and State support and grants		P1 / Ongoing
		Promotion and facilitation of employment and training opportunities	Uptake of employment and training opportunities	30% of businesses engage	P2
B	Grow and support the <b>health sector</b> and cluster development	Engagement with health providers to assist the growth of new health and aged care facilities.	No of health providers engaged  Opportunities identified	Positive feedback from business as a result of Council initiative  At least one targeted industry specific communication and event annually.	Ongoing
		Advocate for training and provision of aged care and social assistance workers.	Collaboration across all levels of government and key stakeholders.	Aged care and social assistance employment gaps reduced.	P2
C	Explore high value health services, medical-tech and future NDIS growth opportunities for small to	Delivery of workshops, training, and networking events.	Feedback survey	80% satisfaction from Western region	P2

no	Pillar/ Initiative	How	Measure	Target	12 month Action Plan Priority 1 Priority 2 Ongoing
	medium sized businesses focusing on emerging services and technologies.		No of health providers engaged.	businesses participating in business development events	
D	Support the growth and recovery of the <b>Visitor Sector</b>	Engagement with visitor sector businesses and SATC to support and grow the sector.	No of visitor sector businesses engaged.	At least one targeted industry specific communication and event annually	P1 / Ongoing
		Delivery of workshops, training, and networking events.	No. of workshops, training, and networking events	80% satisfaction from Western region businesses participating in business development events	P1 / Ongoing
		Promotion of Australian Tourism Data Warehouse (ATDW).	No. of businesses signed up to ATDW.	Increase in businesses listed on ATDW	P1 / Ongoing
		Ongoing delivery of the Adelaide Beaches regional promotion	No of views and reach of the Adelaide Beaches Website.  No of visitors to the region.	Increase in number of visits to Adel Beaches Website	P1 / Ongoing
E	Build local business capacity and capability through the delivery of workshops, events, and mentoring.	Annual calendar of events.	No of events, workshops, mentoring Feedback from surveys.	80% satisfaction from Western region businesses participating in business development events	P1 / Ongoing
		Western Business Leaders membership	Western Business Leaders membership numbers.	30% of our businesses are WBL members by 2025.	P1 / Ongoing

no	Pillar/ Initiative	How	Measure	Target	12 month Action Plan Priority 1 Priority 2 Ongoing
F	Connect local businesses to business support programs, grants, funding and investment opportunities, Western Adelaide Regional and broader initiatives.	Promotion of grants and opportunities.	No of engagements with business  Promotion analytics		P1 / Ongoing
		Delivery of City of Charles Sturt Business Support Grants	No of businesses accessing programs and grants		P1 / Ongoing
G	Support business attraction, retention, and expansion.	Create Investment Attraction collateral including Employment Lands	Collateral designed and implemented.		P2
		Develop targeted business engagement program to assist growth sectors.	No. of businesses visited/engaged with in growth sectors.	New investment, businesses, and jobs growth.	P1 / Ongoing
		Promote business growth and innovation grants oriented towards innovation, diversity, and transformation.	Report on number of business start-ups, building approvals, employment numbers and Investment enquiries		P2 / Ongoing
H	Encourage and facilitate business to business connections	Facilitation of business to business connection through events and workshops	No of businesses assisted to make B2B connections	Annual increase in B2B engagement fostered by CS Org Plan – targets 1.1, 1.2, 2.1	P2 / Ongoing
I	Support <b>Buy Local</b> initiatives to support the local supply chain, increase Council expenditure with local businesses and help businesses learn how to tender.	Promotion of local procurement opportunities.	Council expenditure with local businesses.	Annual increase of 2.5% local spend by Council  All tenders promoted through CS LinkedIn site	P2 / Ongoing
		Delivery of workshops on how to tender	No of workshops	80% satisfaction from Western region businesses	Ongoing

no	Pillar/ Initiative	How	Measure	Target	12 month Action Plan Priority 1 Priority 2 Ongoing
				participating in business development events	
		Promotion of local supply chain opportunities	No of businesses accessing supply chain opportunities	Annual increase in B2B engagement fostered by Council. Org Plan – targets 1.1, 1.2, 2.1	Ongoing
		#Shop Local grants	No of grants delivered and outcomes		Ongoing
J	Facilitate region-building projects	Promote pipeline of regional projects	Investment in regional infrastructure		P2 / Ongoing

### 3. Knowledge and Innovation

No	Pillar/ Initiative	How	Measure	Target	12 month Action Plan Priority 1 Priority 2 Ongoing
A	Develop the entrepreneurial capabilities of our residents and digital literacy for business people.	Delivery of workshops and training sessions	No of businesses and residents accessing workshops and training session.  No of businesses participating in digital solutions programs.		P2 / Ongoing
		Support entrepreneurship scholarships	No of scholarships supported		Ongoing
B	Promote, support and encourage co-working spaces as places for collaboration and knowledge sharing. Investigate the potential for new co-working spaces and partnership approaches.	Development of marketing collateral	Circulation of marketing collateral		P2 / Ongoing
		Investigate the potential for new co-working spaces.	Report on the potential for new co-working spaces.		P1
C	Investigate opportunities for additional GigCity precincts and support existing to foster and grow innovation and attract businesses to the area.	Investigate opportunities for additional GigCity Precincts	Report on opportunities for additional GigCity Precincts		P2
		Promote existing GigCity Precincts to grow and attract businesses	Reports on views & reach		P2 / Ongoing
D	Support the local innovation ecosystem and encourage entrepreneurship and innovation through programs and partnerships that develop the entrepreneurial capabilities of founders, new business start-ups and businesses with the potential to expand and scale.	Partner with industry, government, and education providers to promote opportunities for entrepreneur development including indigenous entrepreneurs.	No of views and reach.  No of entrepreneurs supported  No. of partnerships		P2 / Ongoing
E	Promote and create pathways to employment through a coordinated workforce development agenda	Partner with industry, government, training and education providers to host or support an event that provides a direct link to local employment and skills supply including indigenous employment opportunities.	No of cooperative projects, industry, and education sector engagement	Percentage of our community that have qualifications continues to grow (Org Plan 4,2.4)	P2



#### 4.Vibrant & Liveable City

No	Pillar/ Initiative	How	Measure	Target	12 month Action Plan Priority 1 Priority 2 Ongoing
A	Showcase and promote the city as a great place to live and visit	Development of destination marketing campaigns – Live in the West	Report on visitation numbers and spent  Report on views and reach	Deliver regional promotion plan by Dec 2022 (Org Plan 1.1.1)	P1
B	Showcase and promote the city as a premier business destination.	Create investment attraction collateral including Employment Lands	Report on number of business start-ups, building approvals, employment numbers and investment enquiries Report on views and reach		P1
		Promotion of business success.	No of businesses promoted		Ongoing
C	Attract events and assist businesses to leverage from open access festivals to facilitate growth in visitation and spending.	Attract events and partner	No. of events Report on visitation numbers and spent (Org Plan)		Ongoing
		Events and Festivals sponsorships program	Events and Festivals sponsored, visitation and spend		Ongoing
D	Facilitate and promote attractive and vibrant neighbourhoods by utilising neighbourhood plans, mixed use residential developments and creating boutique, bespoke areas.	#shoplocal initiatives with neighbourhood plans	Report on visitation numbers and spent		P2
E	Grow local creative industries to support employment outcomes.	Creative Cities grants	Number of Creative City Grants provided and outcomes		Ongoing
F	Lead and support environmental goals for sustainability, a growing circular economy and climate action.	Communicate with businesses to encourage actions that mitigate and adapt to climate change.	Number of businesses engaged		P2
G	Connect local businesses to the Material Recovery Facility	Hold event to promote the MRF and opportunities to	No of businesses connected		P2

No	Pillar/ Initiative	How	Measure	Target	12 month Action Plan Priority 1 Priority 2 Ongoing
	(MRF) and promote the re-use of recycled materials.	use recycled materials.			

## 7. Monitoring and Tracking Progress

### Measures of Success

The Strategy and Action Plan have been developed to create and foster an environment that will encourage and support future economic growth and achievement of the goal: an economically thriving city. It should be noted that neither Council nor the key delivery agencies and project partners can on their own, control these outcomes.

The measures of success have been developed to determine the ongoing success of the Economic Development Strategy implementation. A combination of qualitative and quantitative data will be used to measure the success and includes three key measures of success.

#### *1. Satisfaction with the support for business*

The measures will look at the overall satisfaction with the support that Council provides to business and achieving the objective of Charles Sturt being an ideal place to invest and grow a business. Sentiment will be measured through an annual survey.

#### *2. Growing employment and investment*

The strength of the local economy will be measured through local employment numbers and the level of investment that is occurring. This can be measured through the number of jobs in the Council area. The level of investment can be measured through the number and dollar value of development applications. These can be categorised by land use to determine the level of investment, in dollars in residential, commercial and industrial developments.

#### *3. Increase in business start-ups*

The health of the local economy can be measured through the number of small business start-ups. This number of business start-up minus the number of exists gives a picture of the strength of the local economy. The key source of data is the Australian Bureau of Statistics.

#### *Measures of Success Summary Table*

	Measure	How	Target
1	Satisfaction with the support for business provided by Council and perception that Western Adelaide is an ideal place to invest to grow a business.	Annual Business Sentiment Survey.	Growth in positive response.
2	Growing employment and investment.	Annual employment statistics, total number and dollar value of development application in residential, commercial and industrial developments.	<ul style="list-style-type: none"><li>_ Growth in annual employment numbers.</li><li>_ Growth in annual development application dollar value by sector.</li></ul>

	Measure	How	Target
3	Increase in business start-ups.	Annual number of business starts up minus business exist statistics.	Net increase in the annual number of business start-ups.

## **Acronyms**

AHA – Australian Hoteliers Association

ATDW – Australian Tourism Data Warehouse

CS – City of Charles Sturt

EDS – Economic Development Strategy

GAROC – Greater Adelaide Regional Organisation of Councils

RCA – Restaurant Catering Association

SATC – South Australian Tourism Commission

SME – Small Medium Enterprise

TiCSA – Tourism Industry Council South Australia

WR TDAP – Western Region Tourism Destination Action Plan

## **References**

Informed Decisions, 2022, Charles Sturt Economic Trends and Forecast, Melbourne

Informed Decisions, 2022, City of Charles Sturt Economic Profile, Melbourne

Remplan, 2022, City of Charles Sturt Economy and Community Profiles, Bendigo

South Australian Tourism Commission, November 2021, South Australian Tourism Workforce Directions Paper, Adelaide

## **Appendices**



CM ref: 22/95389

v6 28/3/22

## Appendix 2| Four Year Action Plan 2022-2026

### 1. Business Friendly

no	Initiative/Action	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
A	Understand the needs of our businesses through targeted business engagement, business surveys, open forum sessions with key industry sectors and associations and engagement with business leaders and ambassadors on key issues.	Business engagement strategies: _ Open forums _ Business surveys _ Engagement with business leaders	_ No of businesses engaged _ No of open forum sessions _ No of Business surveys _ No of engaged Business Leaders and Ambassadors	80% satisfaction from Western region businesses participating in business development events (Org Plan)	Ongoing	Ongoing
B	Advocate for business and key infrastructure to create the right environment to enable business growth and innovation	Successful advocacy to key stakeholders e.g. Local Jobs Taskforce advocacy role - aged care workers add to the temporary or permanent skilled-migration lists, or introduce a new 'essential skills visa'.	Successful advocacy to key stakeholders		S	P2

no	Initiative/Action	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
C	Demonstrate strong leadership, collaboration and partnerships across government, industry, and community	Continue collaboration with Western Alliance, SATC, TiCSA, State, AHA, RC&A and GigCity	Delivery of collaborative projects and events		Ongoing	Ongoing
D	Demonstrate that Council is responsive to business by making it easy to start, grow and access services	Provide up to date information on the website.	Website analytics		Ongoing	Ongoing
		Business engagement strategies	Quality of business engagement through CRMS system	80% of surveyed businesses that received assistance and advice are satisfied with council support satisfaction	Ongoing	Ongoing
		Deliver welcome packs for new business.	Welcome packs delivered		S	P2
		Satisfaction surveys ongoing and annual	Report on satisfaction with Council	Positive net promoter score	Ongoing	Ongoing
		Maintain Business Friendly Council	Number of initiatives		Ongoing	Ongoing

no	Initiative/Action	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
		status - annual reporting				
E	Provide access and insights into economic modelling, data and analysis for potential investors and local businesses.	Provide information: _ website _ direct to investors _ through highlights and snapshots.	Website analytics No. of businesses assisted.  Remplan	Increase in web traffic	Ongoing / S-M	Ongoing
F	Champion our Community Business Leaders to provide links to the key growth sectors, identify industry needs and provide representation at events.	Leaders invited to events.	No. of events		Ongoing	Ongoing
		Promotion of local business excellence	Increased business confidence		Ongoing	Ongoing
		Business engagement to identify needs and receive industry insights.	Business engagement		Ongoing	Ongoing
G	Celebrate and promote business success by facilitating business excellence awards to showcase leading local businesses	Promote business success stories	Increased business confidence		Ongoing	P 1 / Ongoing
		Hold awards event	Business engagement in event awards		S- M (Q2 2023)	P2

## 2. Diverse and Advance Economy

no	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
A	Engage with partners and the business community to support and grow <b>Advanced Manufacturing and Defence</b> sectors by supporting: the uptake of technology, local supply chain capability, the uptake of grants and employment and training opportunities.	Engagement with partners and the business community to highlight support and opportunities available and build business to business connections.	No of partners and businesses engaged.  No of workshops, training, and networking events	At least one targeted industry specific communication and event annually	Ongoing	P1 / Ongoing
		Support the uptake of technology and building of supply chain capability.	No of workshops, training, and networking events	80% satisfaction from Western region businesses participating in business development events	S	P2
		Promotion of Federal and State support and grants.	Uptake of Federal and State support and grants		Ongoing	P1 / Ongoing
		Promotion and facilitation of employment and training opportunities.	Uptake of employment and training opportunities	30% engage with event invitations	S	P2

no	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
B	Grow and support the <b>health sector</b> and cluster development	Engagement with health providers to assist the growth of new health and aged care facilities.	No of health providers engaged  Opportunities identified	Positive feedback from business as a result of Council initiative  At least one targeted industry specific communication and event annually.	Ongoing	Ongoing
		Advocate for training and provision of aged care and social assistance workers.	Collaboration across all levels of government and key stakeholders.	Aged care and social assistance employment gaps reduced.	S	P2
C	Explore high value health services, medical-tech and future NDIS growth opportunities for small to medium sized businesses focusing on emerging services and technologies.	Delivery of workshops, training, and networking events.	Feedback survey  No of health providers engaged.	80% satisfaction from Western region businesses participating in business development events	S	P2



no	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
D	Support the growth and recovery of the <b>Visitor Sector</b>	Engagement with visitor sector businesses and SATC to support and grow the sector.	No of visitor sector businesses engaged.	At least one targeted industry specific communication and event annually	Ongoing	P1 / Ongoing
		Delivery of workshops, training, and networking events.	No. of workshops, training, and networking events	80% satisfaction from Western region businesses participating in business development events	Ongoing	P1 / Ongoing
		Promotion of Australian Tourism Data Warehouse (ATDW).	No. of businesses signed up to ATDW.	Increase in businesses listed on ATDW	Ongoing	P1 / Ongoing
		Ongoing delivery of the Adelaide Beaches regional promotion.	No of views and reach of the Adelaide Beaches Website.  No of visitors to the region.	Increase in number of visits to Adel Beaches Website	Ongoing	P1 / Ongoing

no	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
E	Build local business capacity and capability through the delivery of workshops, events, and mentoring.	Annual calendar of events.	No of events, workshops, mentoring Feedback from surveys.	80% satisfaction from Western region businesses participating in business development events	Ongoing	P1 / Ongoing
		Western Business Leaders membership	Western Business Leaders membership numbers.	30% of our businesses are WBL members by 2025.	Ongoing	P1 / Ongoing
F	Connect local businesses to business support programs, grants, funding and investment opportunities, Western Adelaide Regional and broader initiatives.	Promotion of grants and opportunities.	No of engagements with business  Promotion analytics		Ongoing	P1 / Ongoing
		Delivery of City of Charles Sturt Business Support Grants	No of businesses accessing programs and grants		Ongoing	P1 / Ongoing

no	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
G	Support business attraction, retention, and expansion.	Create Investment Attraction collateral including Employment Lands	Collateral designed and implemented.		S	P2
		Develop targeted business engagement program to assist growth sectors.	No. of businesses visited/engaged with in growth sectors.	New investment, businesses, and jobs growth.	Ongoing	P1 / Ongoing
		Promote business growth and innovation grants oriented towards innovation, diversity, and transformation.	Report on number of business start-ups, building approvals, employment numbers and Investment enquiries		Ongoing	P2 / Ongoing
		Help businesses access export grants and opportunities.	No of businesses exporting.		M	
H	Encourage and facilitate business to business connections	Facilitation of business to business connection through events and workshops	No of businesses assisted to make B2B connections	Annual increase in B2B engagement fostered by CCS	Ongoing	P2 / Ongoing

no	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
				Org Plan – targets 1.1, 1.2, 2.1		
I	Support <b>Buy Local</b> initiatives to support the local supply chain, increase Council expenditure with local businesses and help businesses learn how to tender.	Promotion of local procurement opportunities.	Council expenditure with local businesses.	Annual increase of 2.5% local spend by Council  All tenders promoted through CS LinkedIn site	Ongoing	P2 / Ongoing
		Delivery of workshops on how to tender	No of workshops	80% satisfaction from Western region businesses participating in business development events	Ongoing	Ongoing
		Promotion of local supply chain opportunities	No of businesses accessing supply chain opportunities	Annual increase in B2B engagement fostered by Council.	Ongoing	Ongoing

no	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
				Org Plan – targets 1.1, 1.2, 2.1		
		#Shop Local grants	No of grants delivered and outcomes		Ongoing	Ongoing
J	Facilitate region-building projects	Promote pipeline of regional projects	Investment in regional infrastructure		Ongoing	P2 / Ongoing
		Advocate for new region building project	No of capital works projects		L	

### 3. Knowledge and Innovation

No	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
A	Develop the entrepreneurial capabilities of our residents and digital literacy for business people.	Delivery of workshops and training sessions	No of businesses and residents accessing workshops and training session.  No of businesses participating in digital solutions programs.		Ongoing	P2 / Ongoing
		Support entrepreneurship scholarships	No of scholarships supported		Ongoing	Ongoing
B	Promote, support and encourage co-working spaces as places for collaboration and knowledge sharing. Investigate the potential for new co-working spaces and partnership approaches.	Development of marketing collateral	Circulation of marketing collateral		Ongoing	P2 / Ongoing
		Investigate the potential for new co-working spaces.	Report on the potential for new co-working spaces.		S-M	P1
C	Investigate opportunities for additional GigCity precincts and support existing to foster	Investigate opportunities for additional GigCity Precincts	Report on opportunities for additional GigCity Precincts		S-M	P2



No	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
	and grow innovation and attract businesses to the area.	Promote existing GigCity Precincts to grow and attract businesses	Reports on views & reach		Ongoing	P2 / Ongoing
D	Support the local innovation ecosystem and encourage entrepreneurship and innovation through programs and partnerships that develop the entrepreneurial capabilities of founders, new business start-ups and businesses with the potential to expand and scale.	Partner with industry, government, and education providers to promote opportunities for entrepreneur development including indigenous entrepreneurs.	No of views and reach.  No of entrepreneurs supported  No. of partnerships		Ongoing	P2 / Ongoing
E	Promote and create pathways to employment through a coordinated workforce development agenda	Partner with industry, government, training and education providers to host or support an event that provides a direct link to local employment and skills supply including indigenous employment opportunities.	No of cooperative projects, industry, and education sector engagement	Percentage of our community that have qualifications continues to grow (Org Plan 4,2.4)	S – M	P2

#### 4.Vibrant & Liveable City

No	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
A	Showcase and promote the city as a great place to live and visit	Development of destination marketing campaigns – Live in the West	Report on visitation numbers and spent  Report on views and reach	Deliver regional promotion plan by Dec 2022 (Org Plan)	S / Ongoing	P1
		Promotion of new residential developments	Report on location trends, building approvals and employment numbers.	At least one targeted industry specific communication and event for key sectors annually	S-M	
B	Showcase and promote the city as a premier business destination.	Create investment attraction collateral including Employment Lands	Report on number of business start-ups, building approvals, employment numbers and investment enquiries Report on views and reach		S	P2

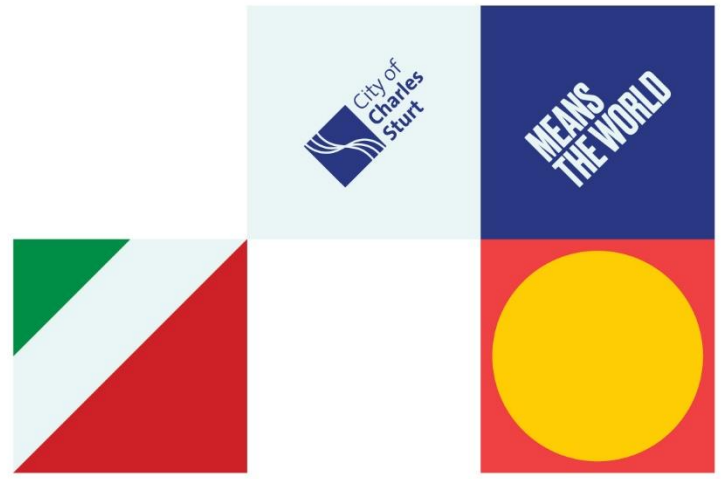
No	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
		Development of destination marketing campaigns.	Report on views and reach		S-M	
		Promotion of business success.	No of businesses promoted		Ongoing	Ongoing
C	Attract events and assist businesses to leverage from open access festivals to facilitate growth in visitation and spending.	Attract events and partner	No. of events Report on visitation numbers and spent (Org Plan)		Ongoing	Ongoing
		Development of destination marketing campaigns	Report on views and reach		M	
		Events and Festivals sponsorships program	Events and Festivals sponsored, visitation and spend		Ongoing	Ongoing
D	Facilitate and promote attractive and vibrant neighbourhoods by utilising neighbourhood plans, mixed use residential developments and creating boutique, bespoke areas.	Development of destination marketing campaigns	Report on views and reach		M	
		#shoplocal initiatives with neighbourhood plans	Report on visitation numbers and spent		S	P2

No	Pillar/ Initiative	How	Measure	Target	4 Yr Timeline short (S), medium (M), long (L) Ongoing	12 month Action Plan Priority 1 Priority 2 Ongoing
E	Grow local creative industries to support employment outcomes.	Link to the actions in the draft CS Arts & Culture Plan 2022-27 – <i>being prepared</i> .			M-L	
		Creative Cities grants	Number of Creative City Grants provided and outcomes		Ongoing	Ongoing
F	Lead and support environmental goals for sustainability, a growing circular economy and climate action.	Communicate with businesses to encourage actions that mitigate and adapt to climate change.	Number of businesses engaged		S	P2
G	Connect local businesses to the Material Recovery Facility (MRF) and promote the re-use of recycled materials.	Hold event to promote the MRF and opportunities to use recycled materials.	No of businesses connected		S - M	P2



12 month Action Plan initiatives

# APPENDIX 3

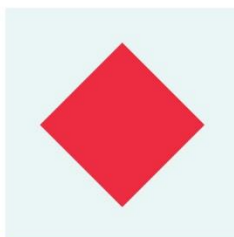


# **Community Engagement Summary Report for the Economic Development Strategy 2022-26**

2 August 2022

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# Community Engagement Summary Report for the Economic Development Strategy 2022-26

## 1. Background

Council has been delivering an economic development strategy for the last 9 years. The Economic Development Recovery Strategy 2020-2022 was created to guide the recovery from the COVID-19 pandemic. The majority of the Recovery Strategy actions have been implemented and the strategy has reached the end of its lifecycle. It is time to consider the current economic trends, forecasts, and the next phase of Council's economic development approach. The strategy will support the growth of local businesses, jobs and enhance community well-being and liveability.

To inform the preparation of the Economic Development Strategy (EDS) and Action Plan 2022-26, an in-depth analysis of the current and forecast economic trends was undertaken and included in the background paper: *Charles Sturt Economic Trends and Forecast Report*. A summary of the key issues, challenges and opportunities are included in the EDS 2022-2026.

Earlier this year the *City of Charles Sturt Business Climate Survey 2022* was conducted to find out more about the businesses that operate in our city. We asked owners and operators in the City of Charles Sturt a range of questions to understand how we can better support their business. The key findings from the survey and actions to respond to the matters raised has been incorporated in the EDS.

The EDS 2022-26 sets out our vision for the economy of City of Charles Sturt and the strategies and actions to achieve that vision. It is an overarching framework that guides the City's economic development initiatives and articulates our role, priorities, and approach. It provides the rationale for engaging with identified priority sectors and delivering outcomes through a detailed Action Plan.

Community engagement was undertaken to seek feedback on the direction and actions in the EDS.

## 2. Engagement Approach and Activity

### 2.1 Engagement objectives

The objectives of our community engagement approach for the Draft Economic Development Strategy 2022-26 are to ensure that:

- Our Charles Sturt business and broader community has easy access to the information about Council's approach to Economic Development.
- Our Charles Sturt community is given opportunities to promote ideas and provide feedback.
- The process builds positive relationships between Council and the community, and positions Charles Sturt as an organisation that is providing sound management decisions.
- Information is provided to the Charles Sturt community of the decision and reasoning for the decision.

## 2.2 Purpose of engagement

The purpose of engagement with our community included:

- Raise awareness of the project.
- Provide the opportunity to have a say in the development of our EDS.
- Identify the priority actions for our business community.
- Gather feedback on the vision, pillars, and principles in the EDS.
- Confirm our understanding of key challenges and opportunities.
- Integrate community feedback into our EDS and delivery of the plan.

## 2.3 Consultation scope

Aspects of the EDS engagement process were negotiable and non-negotiable, as described below:

### *Project Non-negotiables*

- The development of a four-year EDS and Action Plan.
- The economic data that supports the investigations into the EDS.
- The EDS engagement process will invite comment and feedback from a range of key stakeholders as well as the broader business community and community members.

### *Project Negotiables*

- The vision, pillars, priorities, and actions.
- The action plan will be reviewed on an annual basis.

## 2.4 Engagement process

The community engagement period opened on Friday 10 June and closed on Friday 8 July 2022. The community engagement process included the following communication and engagement activities and promotions.

### *Communication Techniques*

- CCS Website
- City of Charles Sturt social media platforms
- Western Business Leaders e-Newsletter
- Council's *Your Say Charles Sturt* interactive online engagement website
- Emails and/or telephone calls to key stakeholders

### *Community Engagement Techniques*

- Online engagement via our interactive website *Your Say Charles Sturt*.
- Round table sessions with key stakeholders.
- Online Feedback Form available via the *Your Say Charles Sturt* website.
- Ability to provide feedback via email or post.
- Incentive provided to complete the business survey in the form of a business advice voucher.

## 2.5 Engagement activity

The engagement activities and level of participation are summarised in Table 1.

**Table 1: Engagement activities undertaken during consultation on our Draft EDS (Friday 10 June to Friday 8 July 2022)**

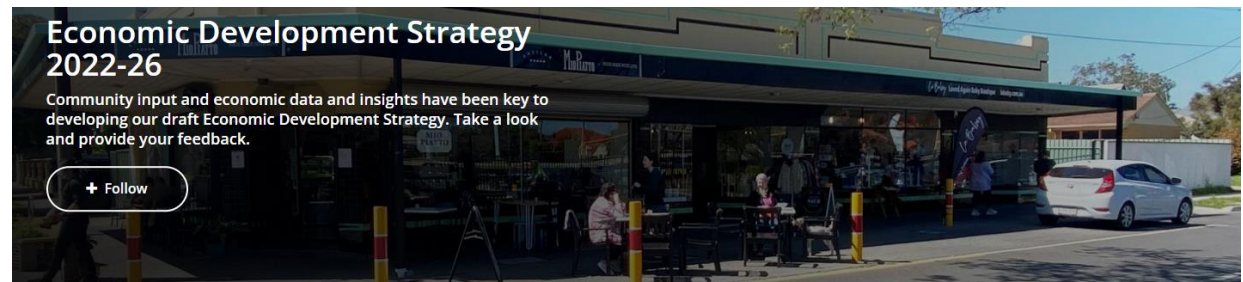
<b>Type of activity</b>	<b>Engagement activity</b>	<b>Date and place</b>	<b>Participants</b>
<b>Your Say Charles Sturt online consultation hub</b>	EDS Project Page visitation	10 June – 8 July 2022 via Your Say Charles Sturt	Open to everyone 422 page views 367 visits 296 unique visitors of the page 7 followers of the page 157 downloads of the EDS 31 downloads of economic trends and forecast report Online engagement time on the project page – 6 hours and 37 minutes
	Your Say campaign (email to interested recipients)	10 June 2022 via Your Say Charles Sturt	981 recipients 550 (56%) opened the email 131 (13%) clicked on the project page link
	Online feedback form	10 June – 8 July 2022 via Your Say Charles Sturt	Open to everyone 9 feedback form responses
	Written submissions	10 June – 8 July 2022	3 written submissions received, including a comprehensive submission by WACRA
<b>Round tables with key stakeholders</b>	Two round tables with key stakeholders	22 June 2022 Civic Centre, Woodville	Open to local business representatives  20 local business and key stakeholders attended representing different sectors
		28 June 2022 Civic Centre, Woodville	
	Western Region Council Engagement	23 & 26 June 2022	Economic Development practitioners from Cities of Port Adelaide Enfield and West Torrens

<b>Type of activity</b>	<b>Engagement activity</b>	<b>Date and place</b>	<b>Participants</b>
<b>City of Charles Sturt social media</b>	Facebook and LinkedIn	10 June – 8 July 2022	5 posts across the two platforms 2 637 impressions 1 826 reach (not including LinkedIn) 29 engagements
<b>Western Business Leaders eNewsletter</b>	Electronic direct mail	10 June – 8 July 2022	7 661 recipients 5 767 (75.2%) opened the email 1 065 (13.9%) clicked on the link

### 3. Examples of Community Engagement and Activity

#### Your Say Charles Sturt – Sample of EDS Project Page

[Economic Development Strategy 2022-2026](#) | [Your Say Charles Sturt](#)



[Home](#) > [Economic Development Strategy 2022-2026](#)

#### A plan to deliver economic growth

Our draft Economic Development Strategy captures the ideas, thoughts and aspirations of our businesses and community to build upon our strong foundations and capabilities and capitalise on new and emerging opportunities to deliver long-term, inclusive and sustainable growth.

#### Four pillars will guide our efforts

Our Strategy will come to life through four key pillars:

- Business Friendly
- Diverse and Advanced Economy
- Knowledge and Innovation
- Vibrant and Liveable City.

Within these pillars we have a range of key initiatives to guide our future economic development efforts.

#### Four sectors add high value to our economy

Four key growth sectors have been identified that add high value to our economy and provide the complexity for future economic growth, these include the following:

- Urban Development
- Tourism
- Defence and Advanced Manufacturing
- Health.

#### What is economic development?

Economic Development Winnipeg created a simple way to explain economic development using everyone's favourite childhood medium, LEGO!

[See video below](#)



**We welcome your ideas and feedback by Friday 8 July 2022.**

#### Have your say



#### Join the conversation today

Create an account or sign in to share your thoughts and ideas.

[Sign up](#)

[Login](#)



**Closed**

#### Feedback Form

Complete this online feedback form by 5.00pm on Friday 8 July 2022. It will only take 5 minutes!

[Start](#)

#### Interested in business grants?

[Click here](#)

#### Western Business Leaders (WBL)

Western Business Leaders (WBL) is an opportunity for any local business owner to meet other like-minded business owners and share their knowledge and experiences to meet the challenges and opportunities of future economic growth.

The WBL network offers a place to make connections with others who are in the same local environment, even though your businesses may be very different. If you're in business in City of Charles Sturt, you're a business leader.

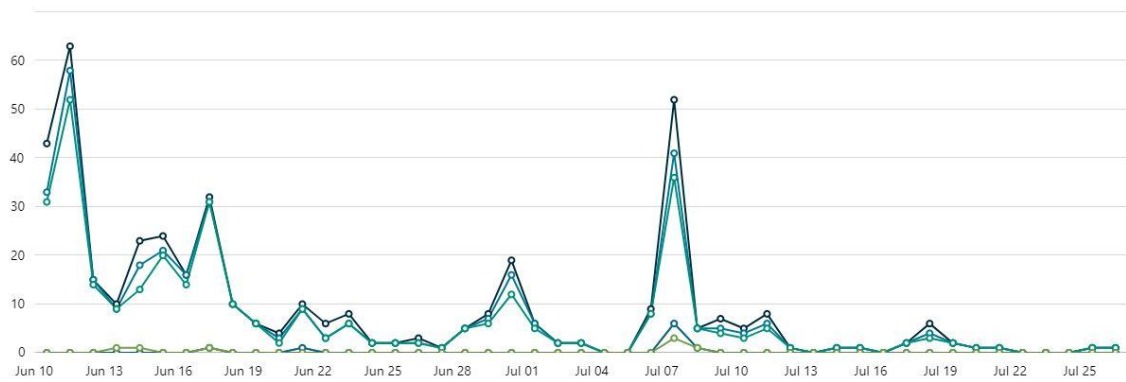
WBL membership is open to all businesses based in the Western Adelaide region. We also invite businesses beyond the region that have a vested interest in the economic growth of Western Adelaide.

#### Interested in becoming a WBL member?

[Sign up here](#)

**Your feedback will inform our Strategy**

## Your Say Charles Sturt – EDS Project Page – Overview of Visitation



## Your Say Charles Sturt – EDS Project Page – Download Activity

### Download Data

Project ▼ Economic Development Strategy 2022-2026 ▼

Keywords

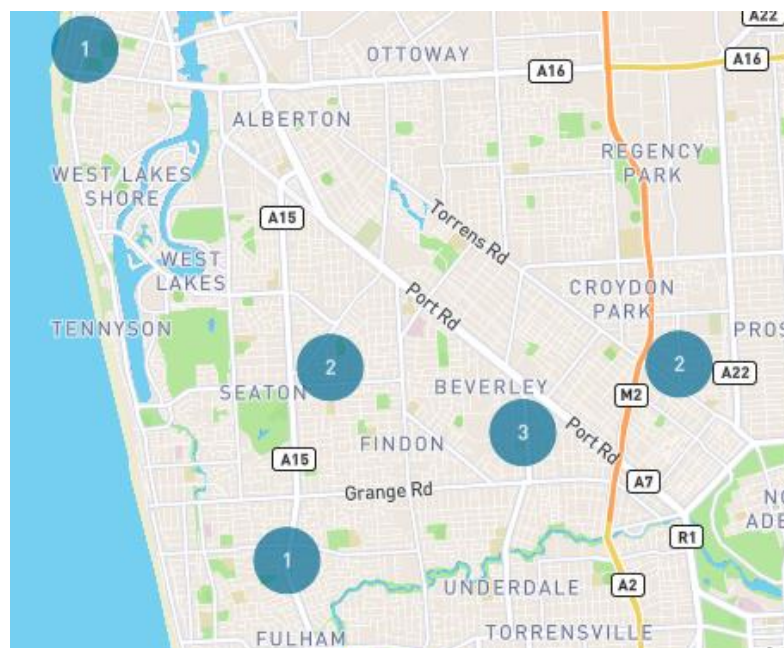
Show Filters

View: 10 ▼

1 - 10 of 22 entries

File Title <span>◇</span>	File Type <span>◇</span>	Downloads <span>▼</span>
Draft Economic Development Strategy 2022-26 (consultation version) v1.2.pdf	PDF	120
Draft Economic Development Strategy 2022-26 (consultation version) 16-5-22.pdf	PDF	37
City of Charles Sturt Economic Trends and Forecast Report 28 March 2022.PDF	PDF	31

## Your Say Charles Sturt – Distribution of Feedback Form Respondents





## Round Tables with Business Representatives and Key Stakeholders

Two roundtable sessions were facilitated and attended by 20 representatives from local business, key stakeholders, and Senior Council staff. The representatives were from a variety of industry sectors including the key growth sectors.

The objective of the round table sessions was to hear from local businesses representatives and stakeholders about their key issues and to receive feedback on the direction and approach of the draft Economic Development Strategy and Action Plan.

A presentation of the key issues, strategic direction and an action plan overview was provided to the participants.

### List of attendees

Attendee	Organisation	Sector
Peter Richings	MacTaggart Scott	Defence
Geoff Rischbieth	Welland Healthy Living Precinct	Health
Brendon Grail	Grail Group Consulting	Health
Graham Hartland	Centralian Controls	Advanced Manufacturing
Sasha Detmold Cox	Detmold	Advanced Manufacturing
Hilary Ashford	MEGT	Workforce
David Cockram	Maxima Group	Workforce
Tony Sims	Henley Beach High School	Education
Blake Soroka	Pelligra Group	Urban Development
Lyn Hay	Adelaide Business Hub	Business Growth
Wendy Perry	Work Force Blueprint	Business Growth
Patty Therios	Adelaide Airport	Transport
Linda Lacey	Tourism Industry Council SA	Tourism
Ben Kelly	Melt	Hospitality / Tourism
Julia Robinson	Restaurant & Catering Industry Association	Hospitality
Helen Lewis	HL Consulting	Tourism / Bus support
Melissa Tonkin	The Gov	Hospitality & Arts
Craig Basford	Big Shed Brewing Concern	Hospitality
Zac Tyler	Release Creative	Events
Ruth Blythman	Release Creative	Events

### Western Adelaide Coastal Residents' Association (WACRA) written submission

A comprehensive 11 page written submission was provided by WACRA. The submission is included in **Appendix 1** to this report.

## 4. Engagement Findings

Engagement by local business and community members was mixed with the direct method of conducting two round tables well-attended and providing useful in-depth feedback from business representatives helpful to the refinement of the EDS. Engagement via other means attracted a reasonable number of views and downloads of information, however the response rate of nine (9) feedback forms was disappointingly low.

### 4.1 Engagement via Round Tables

Feedback was provided on a variety of topics including the following:

#### *Round Table Session 1*

##### **Co-working and innovation precinct discussion**

- Put together modelling and business cases to create a precinct similar to Lot Fourteen
- Hendon – there is an opportunity to redevelop the area as an innovation precinct/hub with a university presence.
- Tonsley could be used as a benchmark where Flinders has been embedded into the development

##### **Hotels and accommodation discussion**

- Need to grow the accommodation offerings in Charles Sturt. Localis data driven insights will be available and help
- Lots of appetite from private sector to work with government to develop offerings

##### **Tourism**

- Western Alliance – City of Charles Sturt is leading the way with strategy there is an opportunity to partner or work more formally to lobby and make larger strategic actions in tourism and infrastructure
- Events - the grants and sponsorship funding available from Council isn't enough to support larger events.
- Marketing could be used to attract and persuade visitors to stay longer.
- Accommodation for tourism isn't the way to go for some construction businesses – model accommodation drivers on professional services
- Coastal opportunities – activate surf clubs using the example of the eastern states.
- Bowden – potential to provide accommodation in the new Gas Site development.

##### **Manufacturing, skills, and business attraction**

- Low-cost skill supply is a way to attract manufacturing hubs
- Work with the Dept. Trade and Investment to attract their contacts to Woodville etc
- Salisbury focused on food, PAE focused on defence – what is our targeted sectors?
- Lot Fourteen is running out of space, what is our angle or opportunity?
- Mapping employment lands could enable us to attract and retain professional services.

##### **Feedback on Advanced Manufacturing**

- Actions should cover more than AI and 5G, what is the opportunity of AI and 5G here? How can we leverage from it? Actions should focus on technology and not be as specific.
- The more we focus on growing our manufacturing sector the more people drawn to the area. Multiplier effect of manufacturing jobs.
- Support businesses to build supply chain/capability.

### **Aged Care**

- Greatest challenge in health and aged care is finding the workforce. Workers have left for the following reasons:
  - Burnout and pulling out of their career after Covid-19 crisis.
  - Not well paid for very demanding work
  - Generational changes
- Investigate entirely private nursing homes such as in Holland to avoid relying on government funding models.
- 1 July 2023 changes are coming to aged care and will be brought together under NDIS model.
- There will also be changes in the disability sector and less focus on group homes.

### **Gaps**

- Sports – is this included under hospitality?
- Parking, infrastructure, and planning limitations:
- Glenelg can do it, there is an opportunity to change perceptions and image here
- Henley Beach – parking pain points – infrastructure needs to happen before development
- Organisations are having issues as they are capped on parking and cannot grow their staffing
- There should be ways to encourage public transport use– give metro cards to staff to attract skilled labour
- Modern cities have ring roads/routes
- Railway station at St Clair – no parking
- Are the provision of end of trip facilities moving fast enough with staff growth?
- Promote rideshares and ebikes

### **Apprenticeships and skills**

- Lack of available skilled labour
- High school students opt for entrepreneurial activities or university – Small to Medium Sized Enterprises do not have the capacity to train apprentices
- There is the option to share apprenticeships across 2 businesses.
- Western Alliance has a role to play in advocating for the region to lobby State Government.

### *Round Table Session 2*

### **Key Growth Sectors**

- Manufacturing – labour shortages are a major barrier; casual labour is not available, and factories are running at 10% absenteeism.
- There are changing expectations of workers, quality of work life is important for staff – they look for opportunities to buy lunch and coffee and the availability of parking is becoming a key decider for new staff. Opportunity to improve staff retention – local businesses could visit big businesses or have food trucks visit.

### **Events**

- Nothing in the strategy about risk taking – public sector is risk adverse – worst possible outcome is considered the only outcome
- Take calculated chances
- Council understand and collaborate with businesses wanting to try new events and ideas in area
- Weather is a big risk – council back events and support businesses if weather ruins event
- Work with businesses and be flexible at the start when they have ideas
- Larger companies could benefit from grants or support too – what could this look like?

- Risk appetite – use economic development team as a chaperone when dealing with regulatory services at CS.
- Access to power and fencing etc. for events
- Make a vibrant city but there needs to be a bigger pool of funding to attract events
- Have conversations directly to work out what is possible and not go through application process and then find out no.
- Could we support a discounted rate for fees and charges relating to events?

#### **What events would help activate Henley?**

- Cellar door by the sea – wine event in the square – Oddio, delinquent, Could this work with beer – 4 breweries?
- Issue at Henley of parking – losing customers because they can't park at peak times – accessibility.

#### **Tourism and Investment Opportunities**

- Economic stability for longer term stays – accommodation
- Response to housing crisis – Airbnb are being used for the rental market
- Lead times have shortened for bookings as a result of Covid-19.
- Dampening effect – West Beach Parks – are long term stays impacting tourism visits?

#### **Advanced Manufacturing**

- If there are businesses willing to offer discounts – local employees are an untapped market – local residents look after local businesses on the weekend
- Packaging or PPE for events can be provided as a local business to participate
- Opportunity to connect businesses better and facilitate co-promotion
- Communicate what's on and local business news in Western Business Leaders, Sharing good business news stories important

#### **Collaboration**

- Encourage local business collaboration – bigger picture collaboration
- Adelaide Beaches
- Plan behind each one of these sectors

#### **Delegations**

- What is council's role in incoming delegations? Link to a scaling up capability?

#### **Co-working**

- Co-working space problem – many people keen to get a cool and unique space in CCS
- How can council facilitate investment in to grow co-working?
- Where food and beverage producers are ready to upscale what commercial kitchen spaces are available? Understand what requirements are needed and utilise kitchens not being used e.g. at community centres or kitchens in council spaces.
- Database of these kinds of venues (West Lakes Library) and co-working spaces – informal spaces & boardroom hire – promote these

#### **Residents and Balancing Negativity**

- Henley Beach use issues, engage through community land management plans, test some of these ideas out in the colder months

#### **Protecting Businesses**

- Entertainment precinct – The Gov etc
- As apartments get closer, will Port Road businesses be protected?
- Branding and promotion of this district to protect the businesses

- New resident packs – showcase these areas – district

**Arts and Lights**

- Creative cities funding
- Make the space vibrant in Hindmarsh
- Placemaking strategies

## 4.2 Engagement via Online Feedback Form

Below is an overview of the responses via the online feedback form. The sample of nine (9) is considered insufficient to be representative however the results are provided for information.

### Connection to the Council area

Of the nine responses, six own a local business, six live in the Council area and three visit places within the Council area. Refer Figure 1.

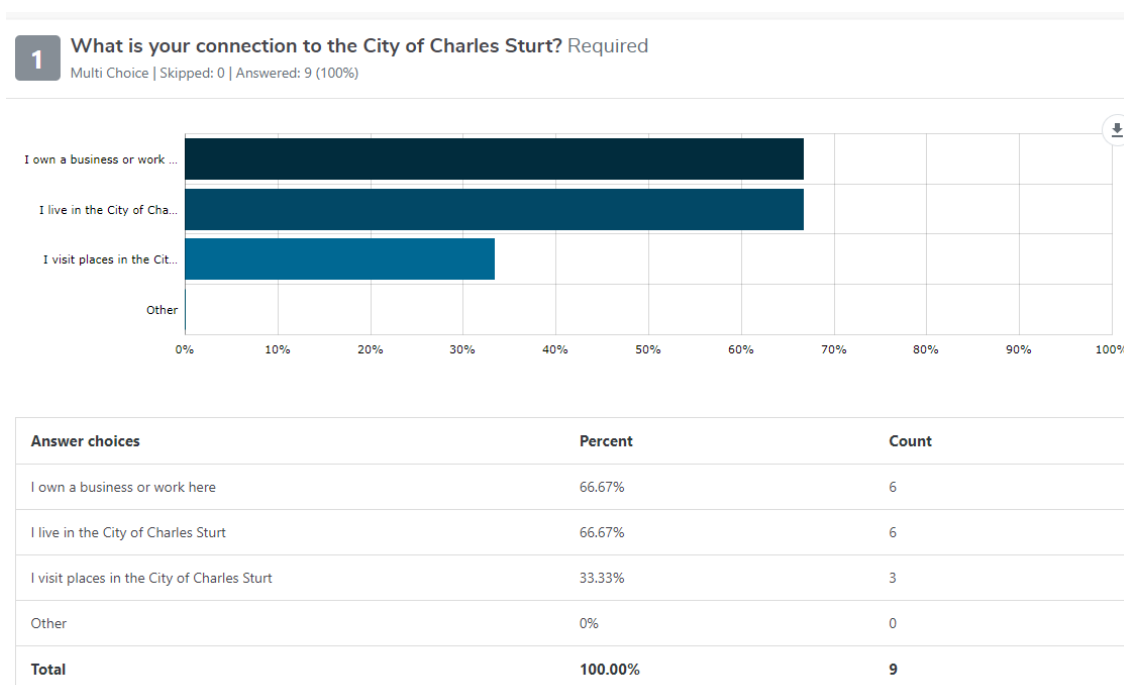


Figure 1: What is your connection to the City of Charles Sturt?

### EDS Vision

All but one response rated the EDS vision highly. The average score was 4 out of 5. Refer Figure 2.

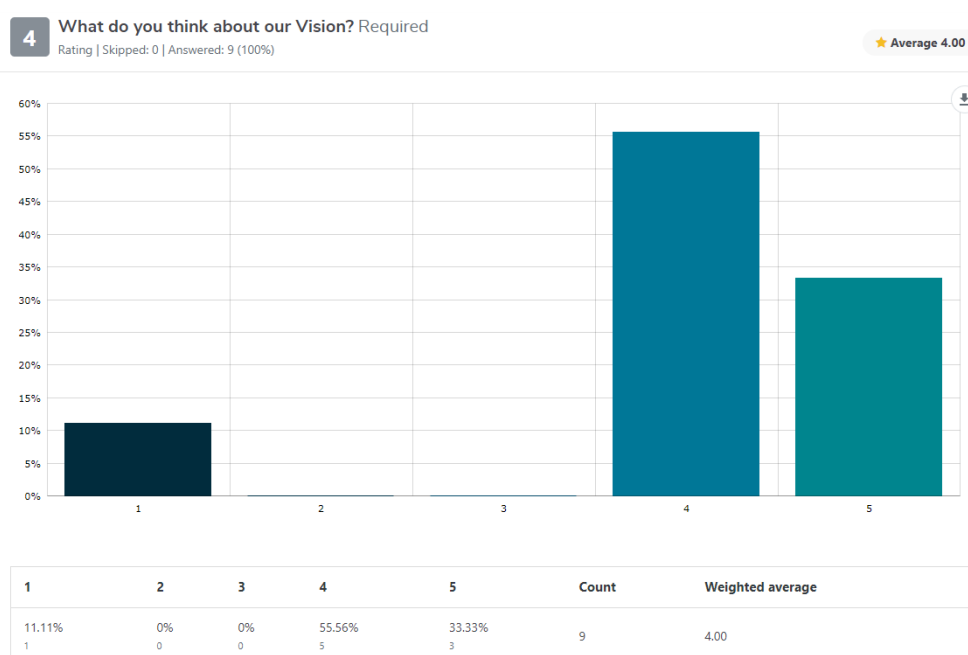


Figure 2: What do you think about our Vision?



### Have you had the opportunity to read the draft strategy? If so, how would you rate it?

We asked respondents to rate the draft EDS. All but one respondent rated the draft strategy 7 or 8 out of 10. The reason the person who rated the draft document 0 out of 10 said they had not read the document yet. Refer Figure 3.

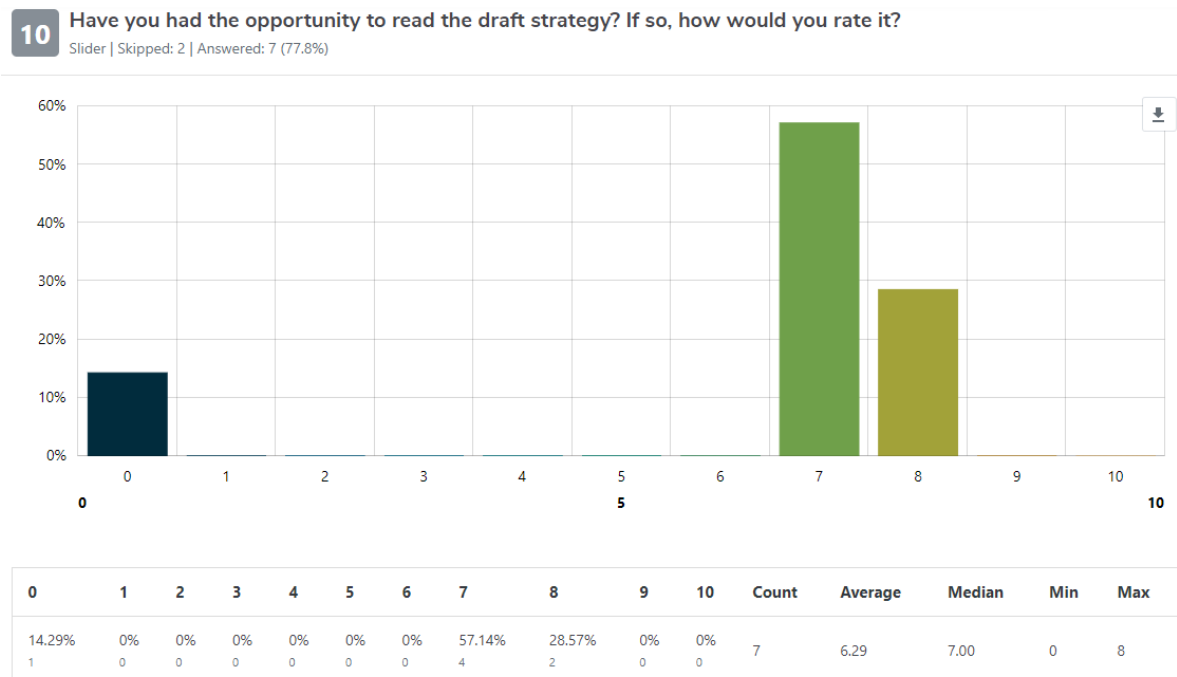


Figure 3: Have you had the opportunity to read the draft strategy? If so, how would you rate it?

### What do you hope the strategy will achieve?

We asked respondents what they hope the strategy will achieve, here is what they said:

- Create spaces where the public want to be due to the diversity and quality of small business initiatives to attract them to that space.
- Opportunities for small businesses to interact and collaborate and assisting with those collaborations.
- More vibrant community and business opportunities.
- More visitors to the council to visit businesses and parks and activated areas.
- Improve lobbying standards and job opportunities in the area.
- As a resident and an entrepreneur who runs a small creative business from home, there are two aspects I am most excited about: the focus on supporting businesses and creative industries and facilitating vibrant neighbourhoods. However, I hope “boutique and bespoke” isn’t code for exclusive and expensive- Charles Sturt is a very diverse council socially and culturally, and I believe INCLUSIVE is the key word here, not boutique.
- Great community connection.
- Less discrimination based on Covid vaccination compliance.

### *Business Friendly: How important are these initiatives?*

We asked respondents to indicate how important are different 'business friendly' initiatives, refer Figure 4. The top responses were:

- Make it easy to start and grow a business.
- Understand the needs of our businesses.
- Advocate for business and key infrastructure.
- Demonstrate strong leadership, collaboration, and partnerships.
- Champion our community business leaders.

	Not important	Somewhat important	Important	Very important	Count	Score
Understand the needs of our businesses	0% 0	0% 0	44.44% 4	55.56% 5	9	3.56
Advocate for business and key infrastructure	0% 0	0% 0	44.44% 4	55.56% 5	9	3.56
Demonstrate strong leadership, collaboration and partnerships	0% 0	22.22% 2	0% 0	77.78% 7	9	3.56
Make it easy to start and grow a business	0% 0	0% 0	11.11% 1	88.89% 8	9	3.89
Provide data and insights for investors and local businesses	0% 0	11.11% 1	33.33% 3	55.56% 5	9	3.44
Champion our community business leaders	0% 0	0% 0	44.44% 4	55.56% 5	9	3.56
Celebrate and promote business success through business excellence awards	0% 0	22.22% 2	55.56% 5	22.22% 2	9	3.00

*Figure 4: Business Friendly: How important are these initiatives?*

### *Diverse and Advanced Economy: How important are these initiatives?*

We asked respondents to indicate how important are different 'diverse and advanced economy' initiatives, refer Figure 5. The top responses were:

- Support buy local initiatives.
- Connect local businesses to business support programs.
- Support the growth and recovery of the visitor sector.
- Encourage and facilitate business to business connections.

	Not important	Somewhat important	Important	Very important	Count	Score
Support the growth of advanced manufacturing and defence sectors	0% 0	44.44% 4	22.22% 2	33.33% 3	9	2.89
Grow and support the health sector and cluster development	0% 0	0% 0	66.67% 6	33.33% 3	9	3.33
Explore high value health services, med-tech and future NDIS growth opportunities	0% 0	0% 0	66.67% 6	33.33% 3	9	3.33
Support the growth and recovery of the visitor sector	0% 0	0% 0	44.44% 4	55.56% 5	9	3.56
Build local business capacity and capability	0% 0	0% 0	55.56% 5	44.44% 4	9	3.44
Connect local businesses to business support programs	0% 0	0% 0	22.22% 2	77.78% 7	9	3.78
Support business attraction, retention, and expansion	0% 0	0% 0	66.67% 6	33.33% 3	9	3.33
Encourage and facilitate business to business connections	0% 0	0% 0	44.44% 4	55.56% 5	9	3.56
Support Buy Local initiatives	0% 0	0% 0	11.11% 1	88.89% 8	9	3.89
Facilitate region-building projects and investment	0% 0	22.22% 2	44.44% 4	33.33% 3	9	3.11

*Figure 5: Diverse and Advanced Economy: How important are these initiatives?*

### Knowledge and Innovation: How important are these initiatives?

We asked respondents to indicate how important are different 'knowledge and innovation' initiatives, refer Figure 6. The top responses were:

- Promote and create pathways to employment.
- Develop people's entrepreneurial capabilities and digital skills.
- Support the local innovation ecosystem and encourage entrepreneurship and innovation.

	Not important	Somewhat important	Important	Very important	Count	Score
Develop people's entrepreneurial capabilities and digital literacy skills	0% 0	33.33% 3	11.11% 1	55.56% 5	9	3.22
Promote, support, and encourage co-working spaces	0% 0	44.44% 4	11.11% 1	44.44% 4	9	3.00
Investigate opportunities for additional GigCity precincts	0% 0	22.22% 2	66.67% 6	11.11% 1	9	2.89
Support the local innovation ecosystem and encourage entrepreneurship and innovation	0% 0	11.11% 1	55.56% 5	33.33% 3	9	3.22
Promote and create pathways to employment	0% 0	0% 0	22.22% 2	77.78% 7	9	3.78

Figure 6: Knowledge and Innovation: How important are these initiatives?

### Vibrant and Liveable City: How important are these initiatives?

We asked respondents to indicate how important are different 'vibrant and liveable city' initiatives, refer Figure 7. The top responses were:

- Facilitate and promote attractive and vibrant neighbourhoods.
- Grow local creative industries.
- Lead and support environmental goals.

	Not important	Somewhat important	Important	Very important	Count	Score
Showcase and promote the city as a premier business and visitor destination	0% 0	11.11% 1	55.56% 5	33.33% 3	9	3.22
Promote the city as an ideal place to live	0% 0	22.22% 2	44.44% 4	33.33% 3	9	3.11
Attract events and assist businesses to leverage from festivals	0% 0	0% 0	55.56% 5	44.44% 4	9	3.44
Facilitate and promote attractive and vibrant neighbourhoods	0% 0	0% 0	11.11% 1	88.89% 8	9	3.89
Grow local creative industries	0% 0	0% 0	33.33% 3	66.67% 6	9	3.67
Lead and support environmental goals	0% 0	0% 0	44.44% 4	55.56% 5	9	3.56
Connect local businesses to the Material Recovery Facility	0% 0	11.11% 1	44.44% 4	44.44% 4	9	3.33

Figure 7: Vibrant and Liveable: How important are these initiatives?

### What kind of digital marketing support would you be interested in?

We asked respondents to tell us what digital marketing support they would be interested in, refer Figure 8. The top responses were:

- Help with my website and how to increase traffic.
- How to create a digital marketing plan for my business.
- How to build my brand.

9

What kinds of digital marketing support would you be interested in? Required

Ranking | Skipped: 0 | Answered: 9 (100%)

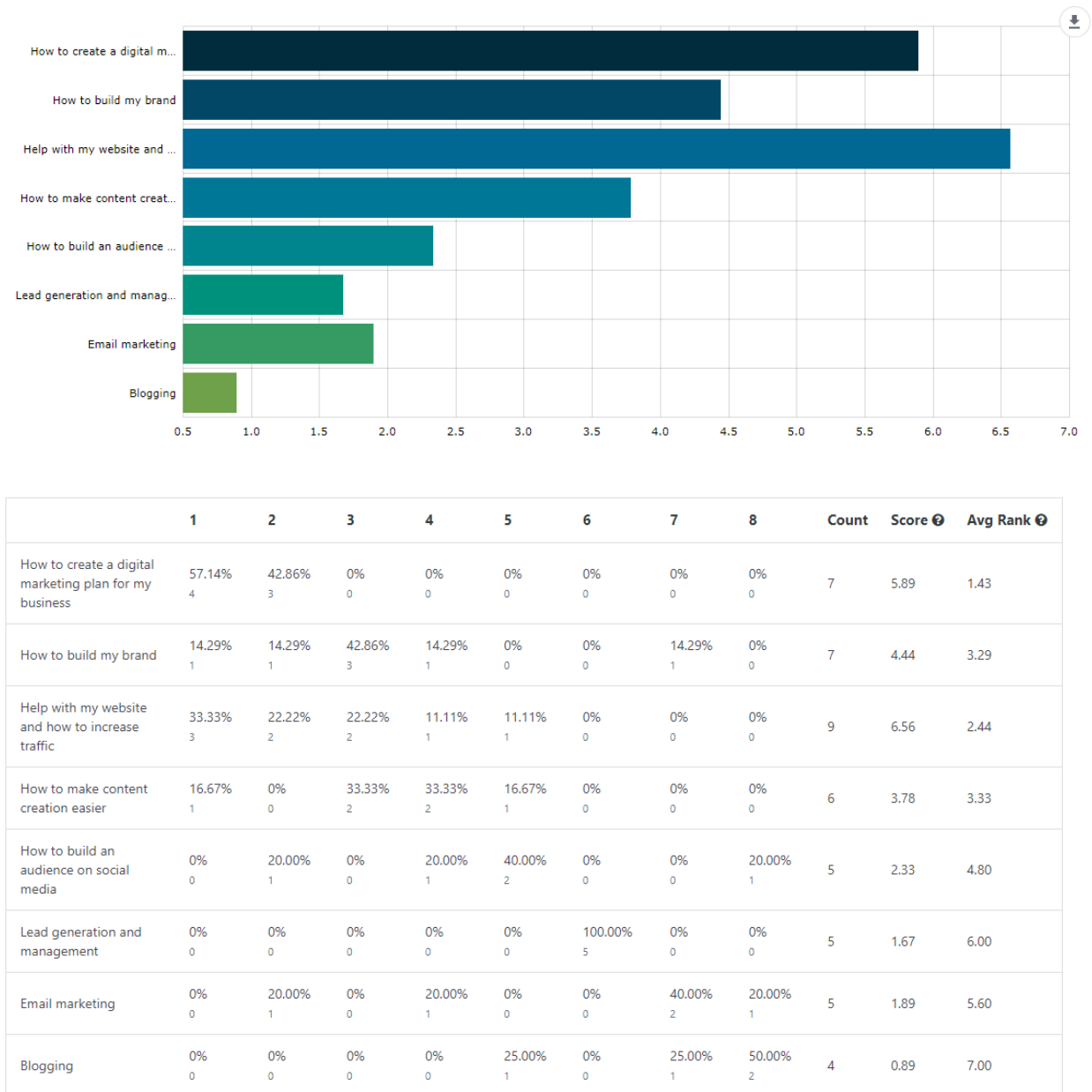
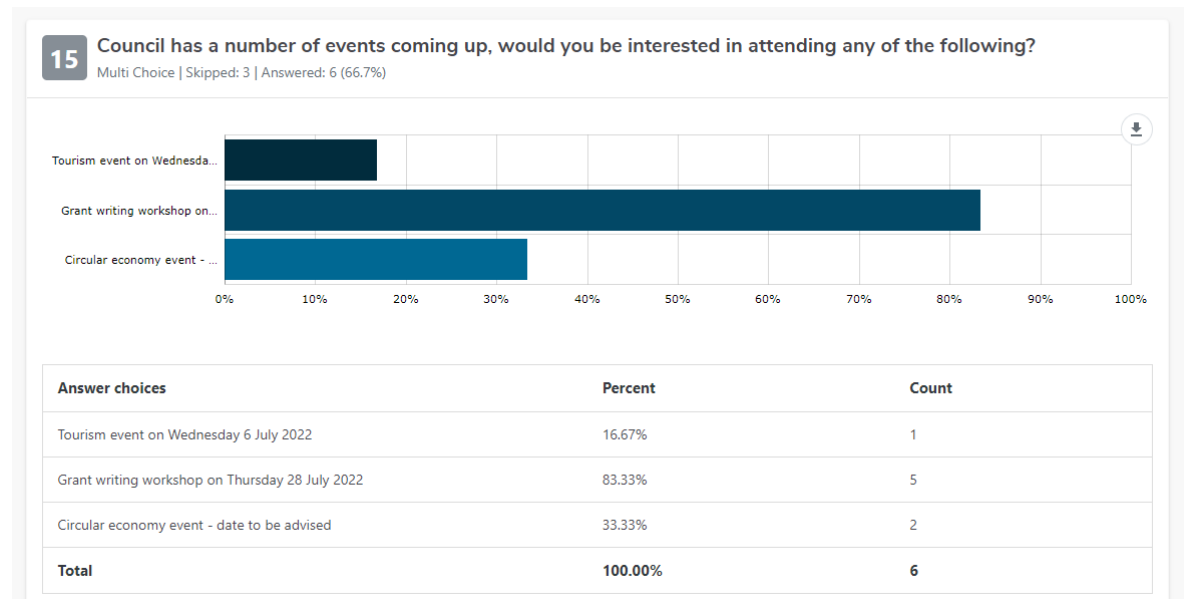


Figure 8: What kinds of digital marketing support would you be interested in?

*Council has a number of events coming up, would you be interested in attending any of the following?*

We asked respondents if they would be interested in attending three upcoming events. Respondents showed a lot of interest in a grant writing workshop. Refer Figure 9.



*Figure 9: Council has a number of events coming up, would you be interested in attending any of the following?*

*How would you like Council to support you in your goals to grow your business?*

We asked respondents to tell us how Council can best support the growth of their business. The word cloud below shows the responses and highlights that the top responses were networking, events, workshops, and grants.



*If you have an idea for economic development in the City of Charles Sturt, pitch your idea here:*

Respondents pitched a number of economic development ideas; these are referred to in the word cloud below. The most common ideas included promotion of small business, pop up promotions and markets, and recycling and processing.



*Are there any gaps in the Draft EDS?*

We asked if there were any gaps in the Draft EDS. The responses received are provided below.

- There are lots of schools in Charles Sturt. While schools are State/ Federal government responsibility, there's a missed opportunity by not naming them in the strategy as business partners/ community hubs.
- Outdoor space for work and play.
- Farmers markets.



## 5. Summary of Common Themes

The common themes arising from the engagement on the EDS are listed below for Council's consideration. In summary, five main themes have been identified from engagement.

### 5.1 EDS Vision and Strategy

- The EDS vision and draft strategy rated highly amongst those engaged.
- Businesses and residents engaged hope the strategy will:
  - Facilitate vibrant neighbourhoods.
  - Improve job opportunities in the council area.
  - Support businesses and creative industries.
  - Provide opportunities for small businesses to interact and collaborate.
  - Encourage businesses to be “inclusive” rather than exclusive and expensive.
  - Attract visitors to the council area to visit businesses, parks and activated areas.
- Important ‘business friendly’ initiatives:
  - Make it easy to start and grow a business.
  - Understand the needs of our businesses.
  - Advocate for business and key infrastructure.
  - Demonstrate strong leadership, collaboration, and partnerships.
  - Champion our community business leaders.
- Important ‘diverse and advanced economy’ initiatives:
  - Support buy local initiatives.
  - Connect local businesses to business support programs.
  - Support the growth and recovery of the visitor sector.
  - Encourage and facilitate business to business connections.
- Important ‘knowledge and innovation’ initiatives:
  - Promote and create pathways to employment.
  - Develop people’s entrepreneurial capabilities and digital skills.
  - Support the local innovation ecosystem and encourage entrepreneurship and innovation.
- Important ‘vibrant and liveable city’ initiatives:
  - Facilitate and promote attractive and vibrant neighbourhoods.
  - Grow local creative industries.
  - Lead and support environmental goals.

### 5.2 Ways Council can Support Business

- Collaboration and innovation:
  - Facilitate investment in co-working, create and promote a co-working venue database.
  - Model potential co-working business cases (e.g. Lot Fourteen and Tonsley).
  - Investigate Hendon as an innovation precinct with a university presence.
  - Facilitate local business collaboration .
- Provide networking opportunities.
- Offer workshops on digital marketing, grant writing, website design, branding
- Offer grants and funding for small and large businesses, and events
- Support events (entertainment events, pop up promotions, markets):
  - Take calculated risks - collaborate with businesses, back new events, and ideas (e.g. Council support if weather affects event, assist with power, fencing, movement and parking strategies, discounted charges).
  - Have event conversations directly to work out what is possible and not have to go through an application process and then find out ‘No’.

### **5.3 Ways Council can Support Business Precincts**

- Brand and promote key precincts to protect businesses:
  - Hindmarsh Entertainment Precinct – continue to make the precinct vibrant (e.g. lighting, arts, culture, entertainment), protect Port Road businesses (e.g. The Gov) as apartments get closer.
  - Henley Beach Precinct – update community land management plans, test ideas out in the colder months
  - Address parking pain points – infrastructure needs to happen before development, develop transport and movement strategies.
  - St Clair and Woodville Railway Station – encourage parking, promote rideshares and ebikes.
- Offer new resident packs that showcase precincts and businesses in the local area.
- Creative Cities funding.
- Continue with placemaking strategies to promote precincts in the Council area.

### **5.4 Ways Council can support Workforce, Apprenticeships and Skills**

- Consider schools as potential business partners and community hubs.
- Promote the opportunity to share apprenticeships across two businesses.
- Work with the Western Alliance in advocating for the region and lobbying government.
- Facilitate quality of work life improvements for staff and promote business to business connections.

### **5.5 Sector Specific Feedback**

- Tourism sector:
  - The City of Charles Sturt is leading the way with their strategy but there is an opportunity to partner or work more formally to lobby and make larger strategic actions in tourism and infrastructure.
  - Events - the grants and sponsorship funding available from Council is not enough to support larger events.
  - Grow and promote hotel and accommodation offerings
  - Marketing could be used to attract and persuade visitors to stay longer.
  - Change perceptions and image of the City.
  - Coastal opportunities – activate the surf clubs using the example of the eastern states.
  - Facilitate Bowden/Brompton opportunities (e.g., providing accommodation at the Gas Works Site development).
- Health
  - Investigate entirely private nursing homes such as in Holland to avoid relying on government funding models.
- Manufacturing sector:
  - Focus on growing our manufacturing sector - multiplier effect of manufacturing jobs.
  - Use low-cost skills as a way to attract manufacturing hubs.
  - Work with Dept. Trade and Investment to attract their contacts to Woodville.
  - Define our target growth sector(s)
  - Investigate opportunities from Lot Fourteen
  - Map employment lands to attract and retain professional services.
  - Connect businesses better and facilitate co-promotion.

- Communicate what's on and local business news in Western Business Leaders, sharing good business news stories important.
- Update actions to focus on technology and not be specific.
- Focus on growing our manufacturing sector - multiplier effect of manufacturing jobs.
- Support businesses to build supply chain capability.

## 6. Next Steps

Our commitment is that business and community feedback will be analysed and collated into common themes and inform the refinement of the EDS. Following that, a report will be prepared for the consideration of Council.

Following Council endorsement of the EDS, stakeholders and members of the community who participated in the engagement process will be informed of Council's decision and where they can view the new EDS via *Your Say Charles Sturt* and other communications channels.

**WACRA Response to City of Charles Sturt**  
**Draft Economic Development Strategy 2022-2026**

**July 8 2022**

**Introduction**

Thank you for engaging with the community with the draft Economic Development Strategy (EDS) 2022-2026. It is good to see that Council has reconsidered the original plan in the light of all the major changes since Covid-19. We apologise for the lateness of our submission.

Another major change is the election at both State and national levels of Labor Governments. Their policies and strategies for action provide many new opportunities for the Council to partner with and enhance their effectiveness at the local level. In particular, sustainability objectives will be strengthened at both levels.

Another new development of importance when considering the EDS is the release of new data from the Australian Bureau of Statistics (ABS) 2021 survey. They have published a certain amount of data on each LGA, not going into all of its survey data, but enough that it is possible to see trends in the data released this week.

We have taken into account previously announced Plans in drawing up WACRA's response to the EDS, such as Our Community Plan 2020-2027 and Our Organisational Plan 2020-2024 and Council's Economic Development Recovery Strategy (June 2022).

We salute the Council for its clear, transparent commitment to planning for the future and publishing objectives and strategies for our community.

**New ABS Findings on City of Charles Sturt - 2021**

The Council has sustained a large population growth in the past five years. From 111,759 people in 2016, the Council area now houses 121,840. That is a growth of 10,000 in a short time, an indication that the urban densification strategy is working, albeit at the cost of many established trees.

Within the overall population, there has also been a rise noted nationally of the number of people identifying as Aboriginal and/or Torres Strait Islander. In 2016, there were 1,619 people who identified. In 2021, there are 2,005 people or 1/6% of our LGA. The South Australian average is 2.4% and Australia 3.2%.

The median weekly income for a family aged 15 years and over for our Council was \$2,072 slightly higher than the SA average of \$1,889. In 2016, the median weekly income for a family was \$1,607 and SA average was \$1,510.

## **Pandemic Consequences**

The Council's Economic Development Recovery Strategy (June 2022) reveals that the pandemic-impacted sectors in our Council area by job losses since March 2020 have been: Retail Trade - 298 jobs (5.3 %), Accommodation and Food Services - 119 jobs (4.2%), Education & Training - 111 jobs (3.3%). The Arts and Recreational Services sector was highly impacted in all stages of the pandemic, shedding 52 jobs (5.5%) in the first two months after the outbreak.

Clearly there have also been major health impacts and significant illness burden on the community and economy as the virus is now threatening a significant third wave with Omicron 4 and 5. Forecasting its impact on the economy is difficult, as its impacts are widely spread over a third of South Australians, including an estimated 10% living with long Covid.

## **Summary of Economic Development Strategy Highlights**

The draft Economic Development Strategy synthesises the thoughts and aspirations of businesses and community. It builds upon the already strong foundations in Charles Sturt and capitalises on new and emerging opportunities to deliver long-term, inclusive and sustainable growth.

Council has several important roles to play as facilitator, partner, promoter, information provider and advocate creating a resilient, sustainable and prosperous local economy. Most importantly, it leads in setting a vision and growth areas.

The EDS recognises that the environment and economic productivity are intrinsically linked and that increased activity has the potential to bring greater prosperity and equity to the city. We support the EDS as not purely a plan about economic growth. It is focused on economic, social and environmental outcomes.

### **Vision – Environment Outcomes**

In terms of the EDS, Charles Sturt brands itself as a liveable, business-friendly city with a diverse, advanced economy. Council also supports knowledge and innovation and is a leader in terms of planning for environmental outcomes. WACRA is happy to be a collaborative partner in these strategies. From the Community Plan 2020-2027, Environment Outcomes for Charles Sturt include:

- Greenhouse gas emissions significantly reduce and we adapt to our changing climate
- Our city is greener to reduce heat island effects and enhance our biodiversity
- Charles Sturt is recognised as a leading partner and educator in pursuing a sustainable future without our community
- Reduced waste production across our city, combined with growth of our circular economy
- We advocate for the protection of our coastal areas and enhancing biodiversity along our coast.

## **Climate and health future factors as risks economic development**

WACRA wonders how well these objectives are translating into action on the ground. Over the years of the EDS to 2026, the rapid change in climate variables, heat, natural systems being overstretched could mean that our economic base might change quickly and detrimentally.

It is of concern to us that the EDS survey into business climate with 156 respondents found that only 53% stated that they are looking for ways to become more environmentally friendly. It appears that business people on the whole are treating environmental action as an option that they might buy into rather than an imperative to begin to transition into a new kind of future.

- WACRA supports the focus on the three economic, social and environmental outcomes. In the light of Council's climate emergency work that we support, we would like to see more depth and resources in this document placed on leadership to move work from business as usual to creating a more adaptive, resilient economy with the climate emergency risks at the forefront of thinking.

The combination of social well-being and environmental sustainability underpin a green growth economy, one in which Charles Sturt could be a leader if it chooses this path to ameliorate the following potential economy-eroding risks:

**Flooding** – This year has seen four ‘unprecedented’ floods, one after the other, hit many regions in eastern Australia. Several analyses have shown that the Port River, under scenarios of rapid sea-level rise, could inundate a lot of the Port Adelaide and Charles Sturt Council low-lying housing areas. Where in the economic development do you make plans for this? What are your strategies for storm water management in this type of crisis? Have vulnerable areas been informed of their potential risk and given ways of preparing?

**A new pandemic** - Covid-19 came out from nowhere it seemed. Since then, the health of the community has been challenged by epidemics of Influenza and colds in addition to increasing Covid numbers. Monkeypox and other exotic transmissible diseases are beginning to circulate again with the opening of the borders to international air travel. It seems that our community will always need to be fighting these disease threats as they emerge, some of it which may come from climate instability and deforestation which driving animals into closer contact with humans than in the past. Covid has already passed the barrier into a wide variety of animals, where it can mutate and then be passed back again. We must plan for unknown pandemics in the future which could substantially impact our economy as Covid did in 2020-2021.

**Heat** – New records continue to be broken each month with temperatures, rainfall and many indicators in the ‘unprecedented’ range. As an urban LGA, not very dependent on agriculture, we have more ability to ride out temperature extremes, albeit with increase in the use of air-conditioning.

We are lucky in SA that our wind and solar initiatives over many years will help provide more sustainable power for cooling. Although it assumes an increased energy usage, consuming power from renewables helps with the decarbonisation of the economy, compared to fossil fuel alternatives. The past few years has seen 51% of workers in our city working from home, using their own heating/cooling systems. More cooling being needed assumes that people have the economic well-being to pay for heating/cooling in their own homes.

- As future-proofing, WACRA asks Council to consider establishing cooling refuges at its own headquarters and other public libraries as places for people to stay during heat waves in safety and be safe and hydrated.

**Coast degradation**— The degradation of the seagrass meadows has been a factor of concern for decades on the Gulf of St Vincent coast, where the City of Charles Sturt manages 12km. This loss accounts for a number of poor outcomes, including loss of sea life and sand drift to the north. Economic plans for tourism would be thwarted if beaches continue to degrade, as has been seen in the southern beaches.

WACRA supports the Council working collaboratively with regional partners, State Government and experts to more quickly stabilise its coast. Experiments such as the oyster bed at Glenelg could be important to replicate along our section of the coast, as would be small, sand-based groynes to slow the northward movement of sand. This is a topical and urgent question.

- WACRA support evidence based, expert advised planning about coastal management strategies to clearly high-risk scenarios.

**Low tree cover** - We acknowledge the commitment of the Council to a new target to green the West of 25% cover by 2045. It seems too little, too late. We have provided deputations and strategies to Council to up this target. The more open, low socio-economic suburbs are going to feel the heat effects more severely than any with trees. It is not about looking pretty. People need trees, with some growth which takes years, to cool their local environments.

- WACRA urges the Council to be bolder and revisit the tree canopy targets as a priority, just as you are revisiting this EDS. We are happy to work with you.

**Waste and solar** – Charles Sturt has taken many strong initiatives in the circular economy that we applaud. We support your energy initiatives on your own properties and in the street lights of the city which are showing business a model of sustainable practice and reducing emissions. There is always more to be done, as we live in a ‘work and buy’ capitalist system where there will continue to be stuff that people throw out. The cost of dealing with this, educating consumers, trialling new initiatives are high but worthwhile in terms of costs that could escalate.

- WACRA supports ongoing work in the waste and solar sector, particularly with the business initiatives.



**Transport** - ABS Findings in 2016 Census showed that we are still a very car-dependent, fossil-fuel burning population, with only 10% of our population taking public transport to work. The figures for 2021 are less helpful as a large number of people worked at home due to the pandemic.

Transport Mode	Charles Sturt	%	South Australia	%	Australia	%
Used public transport	5,151	10	53,457	7.2	1,225,668	11.5
Used car as driver or passenger	37,551	72.6	539,409	72.3	7,305,271	68.4
Worked at home	1,627	3.1	32,679	4.4	503,582	4.7

There is a lot of work to be done to convert the private car usage in our Council to increased public transport usage. That, in spite of the fact that we have two train lines, Outer Harbor and Grange with good access to the city and quite good coverage of buses which come much more regularly than in the past.

In terms of risk to business, fossil fuels will increase the likelihood of climate extremes occurring more often, thereby destabilising the business and social environment.

Leadership from the Council on converting private car usage to public transport or bike use would make a big change in our Council overall CO2 emissions as part of its sustainability objectives.

- WACRA supports the challenges and opportunities charted on page 23-24 of the EDS and urges the Council to keep abreast and lead in the area of new technologies and targeting opportunities. In the environmental area, both the increase of EV charging stations within the Council area and promoting circular economy businesses are key initiatives.
- WACRA believes that personal transport options are a key variable in economic sustainability that could be moved by leadership, promotion and strategies. We support the new bike paths, bikeways, DDA accessible bus infrastructure and other infrastructure initiatives that make it easier for people to choose to take public transport or ride bikes.

## **WACRA COMMENTS ON FOUR CHOSEN GROWTH AREAS PLUS ONE**

### **1. Urban Development**

WACRA urges the Council to be bold in accepting the challenges of the 30-year Greater Adelaide Strategic Plan. The 30 Year Plan promotes a green liveable city, greater housing choice, walkable neighbourhoods and sustainable transport use. Urban development linked to public transport and open space presents the greatest opportunities along road and rail corridors. Facilitating urban development opportunities will require a collaborative approach involving State and Local Government and the private sector.

Bowden, West, and new sites at The Square at Woodville West are examples of sustainable, green living near public transport options. Our urban planners are working in the policy context of social and environmental goals complementing economic growth. It is clear that the Council land area is undergoing densification and tree loss. Do Council planners have the tools they need to achieve these goals, for instance, tree canopy loss vs development?

- WACRA supports Council's integration of social and environmental sustainability goals in any new construction planned and urges both retention of existing trees and creation of more social and co-housing as a social good.
- We hold concerns about the approval of a big housing development at the corner of Valetta and Findon Roads, Kidman Park, as we do not believe the road infrastructure is currently capable of carrying more traffic entering and leaving.
- We also echo CASA's call for a review of the SA Planning and Design Code with its many flaws and for Council to input on reforms.

### **2. Tourism (and Creative Industries)**

The EDS says that tourism makes a significant contribution to the Charles Sturt economy and presents an opportunity to benefit a number of key sectors across the local economy. Collaborating and promoting tourism as part of the Western Region provides an opportunity to develop and grow tourism employment and visitor spending. The Adelaide Beaches Visitor website has been a key driver in promoting all there is to see and do in region to a broader audience.

Showcasing Charles Sturt as a premier visitor destination and attracting value-adding industries will be important to reduce reliance on population growth and provide jobs for our residents. Hopefully, this will be done in a sustainable way to maintain the lifestyle our community expect.

The Strategy also highlights the new Growth Sectors as part of the State Government Growth agenda, including several that the EDS captures. Creative Industries is neglected in the Charles Sturt EDS. This seems a poor choice, as the Council area is home to a large number of creatives who have suffered in the pandemic with the closures and cancellations.

This seems an ideal time to pick this sector up. It can start with individuals, their business and grow as the artists are able to work, perform and exhibit more often. Creative industries are public services, important to the health of democracy and clear tourism attractors. They put the zip into economic development.

- WACRA recommends extending the category of Tourism to include Creative Industries, just as Defense and Advanced Manufacturing are seen as one area. They both have obvious synchronicities.

### 3. Health

A demographic trend across Australia and locally is the increasing proportion of both older adults (55+) and the people living with disabilities in society. Charles Sturt also has a high concentration of people with chronic disease. In building the local health economy, Council's vision aims to respond to the health and wellbeing needs of its community.

It is worth looking at the older age brackets in the 2021 ABS Survey for Charles Sturt. In no category does Charles Sturt have more people in the older ages than SA generally. Contrary to what is stated in several existing Charles Sturt strategic planning documents, this Council does not have more older people than SA generally. The Council area does have more older people than Australia generally however. It is unhelpful to use that as a planning rationale within our State when not factually correct.

Median Age	Charles Sturt	%	South Australia	%	Australia	%
60-64 years	7,570	6.2	112,846	6.3	1,468,097	5.8
65-69 years	6,455	5.3	102,304	5.7	1,298,460	5.1
70-74 years	6,053	5.0	94,040	5.3	1,160,768	4.6
75-79 years	4,362	3.6	66,986	3.8	821,920	3.2
80-84 years	3,383	2.8	45,666	2.6	554,598	2.2
85 years and over	3,732	3.1	47,325	2.7	542,342	2.1

That does not mean that there is not a need for health care, disability support, primary health care and other initiatives which we support.

For some curious reason, the planning documents rarely mention the Western Hospital at Henley Beach, which is a large magnet for health care provision, increased services and large numbers of local users. As a large employer, it should be added to all of your documents as a significant healthcare node. It definitely should be the third hospital on MAP 1 – Economic Development Assets

#### **4. Defence and Advanced Manufacturing**

There is potential for advanced manufacturing to diversify with the new federal government looking to vastly expand local production of renewable products, such as solar panels. It is possible for small to medium size enterprises to engage in the defence sector and supply chain as potential economic levers in this Council. Hopefully, some of the older, unused factory sites could be converted to house advanced manufacturing in new digital and AI industries.

There is a significant backlash within the community to Scott Morrison's AUKUS partnership that involves nuclear submarines being built in our neighbouring Council area. There are many areas of concern, but an obvious one which would impact on all the economic and liveability objectives is that building nuclear submarines at Osborne, makes our local area a strategic target of interest to world powers, many of who have, or are developing, missiles that put our city at risk of being hit.

In 2017, WACRA sought to make a presentation to Council on a Nuclear Free Policy but this was declined as such decisions sit with State and federal government.

- WACRA wishes to reiterate our grave concerns about this development and do not support the establishment or extension of any nuclear industry near our Council.

#### **5. Indigenous Focus**

WACRA would like to recommend consideration of a fifth growth area in this EDS: Indigenous Focus. The City of Charles Sturt consistently acknowledges and pays respect to the traditional custodians of the land, the Kurna people of the Adelaide Plains, its Elders past, present and emerging at meetings, events, in publications. The Council reiterates that it acknowledges the contributions and important role that Aboriginal and Torres Strait Islander people play within the local community.

Where is the substance of this respect to be found in the plans and actions of this Council? Given the history that is now known and acknowledged, it is curious that such an oversight continues unchallenged.

Our western European paradigm is to think of the place where we live and work as our land we own, to provide for us as we use it. Aboriginal people think of it as their Country, a place they are custodians of, to make it live, to sustain it, not as individuals but as people who are part of a continuum of care over time, ancestors, present living and those to come.

These two perspectives are like oil and water. Neither of us can see why it is so hard to think like we do. And yet, as we are increasingly challenged by the climate emergency unfolding, it is evident that we have much to learn from a culture that could live in the harsh, climate changing world of Australia for millennia. What could we learn if we involved them in our planning of stormwater, of flooding? What about assisting them to run small culture-based businesses where people could pay them for accessing knowledge and skills? Do we know what this environment meant to them when it was wetlands and hunting grounds,

ceremonial places? How can we tap them, fairly, renumerated, for the stories they want us to know? How do we learn from their practitioners how to care for Country?

Our Council is good with words. In the Community Plan 2020-2027, the top community outcome is: **In our City, no one gets left behind.**

The ABS data from 2016 and 2021 for Charles Sturt paints a picture of disparity between the general council population and indigenous residents. For instance, 33% of us own our house outright according to the 2021 Census where that number is only 10% for indigenous people. Household weekly income is an average of \$200 less for Aboriginal/Torres Strait households in both survey periods 2016 and 2021. Data on mortgage repayments, with people trying to raise their home ownership status, shows a potential for mortgage stress, as these households were paying \$200 per month in 2021, well before the current interest rate rises.

ABS Census Data for City of Charles Sturt	2016 All Charles Sturt households	2016 Aboriginal households	2021 All Charles Sturt households	2021 Aboriginal households
Median weekly household income	\$1,231	\$1,052	\$1,563	\$1,358
Median monthly mortgage repayments	\$1,700	\$1,733	\$1,733	\$1,950

The number of indigenous people married is much less than the population generally. Intergenerational trauma, disadvantage, the long tail of the Stolen Generation, racism and other factors, mean that relationships have more challenges than for most people.

This picture, less stable accommodation, less income, more costs, less relationship support is set in the context of 400 more people identifying as Aboriginal in this Census from the last one for our Council. There are more people, more disadvantage, and no acknowledgement of this reality in the planning. The indigenous residents are very vulnerable to being left behind economically.

WACRA feels this is one area where the City of Charles Sturt is well-placed to be an innovator, walking with its indigenous residents, some of whom are well-known leaders. The median age of our indigenous population in the 2021 Census is 24. It is a young cohort, one that is well-placed as a growth area for economic development.

This is a perfect time to form a Council Indigenous Task Force to examine what could be done in the economic sphere to provide opportunities for work, for new businesses, for integration with existing opportunities within the Council.

WACRA has a few suggestions for Council to consider with such a Task Force. It is not our place to shape what actually happens, but these are offered as ideas and visions until you have a group of indigenous people meeting together to determine their own priorities:

- Establishment of a centre in Charles Sturt, using an underused Council building with outside access, as a hub for small enterprise, language teaching, crafts, etc. In Henley, if the white house by the Henley Library is deemed an asset to be kept, this could be such a location, underutilized as it is today.
- Dedicate a stall at the Maker's Market at Henley Square for craft works by local Aboriginal people, coordinated by an indigenous curator. Many people make things but do not have an outlet to showcase their wares. It could give local indigenous people a safe space to meet others.
- Kurna or Ngarrindjeri are the two indigenous languages most spoken in our Council according to this Census. A business opportunity bursting with potential is language classes for both indigenous and non-indigenous people who are keen to learn and speak local languages.
- Tap the new federal government funding for Aboriginal rangers to create positions in the horticulture team as Coast Keepers, Cultural Burners, etc.
- Develop an extended tourist attraction of native grasses along the Port Road corridor. Is there any need for the Port Road central landscape to be grass? What about converting to native grasses, following the Adelaide City Council initiatives in the Parklands which it abuts at the eastern edge of our City? Not only would it increase the butterflies, birds, reptiles in a grassy landscape over the stormwater pipe, it would increase the pedestrian use of these areas with education, interpretation, places for outdoor workshops, basketry, etc. The scope of Port Road's length would make it unique and remarkable, returning Country to its preferred grasses.
- Encourage all local businesses to employ indigenous people as a priority. Provide support and resources for this.
- Encourage start-up businesses and support indigenous entrepreneurs.

We notice is that nothing like this is in the EDS even though we like to use the Welcome to Country and to brand the libraries with Kurna. It is a blind spot in our economic planning.

Now is the time, post-pandemic, to lift into actual working with and listening to local residents to start a cycle of economic development in their lives. We live and work on Kurna Country. This type of initiative, new to Adelaide, is well-placed with a population of

2,000 people in our Council. It needs commitment and leadership to get it started, but it is the basis of work that needs to happen someday. Let's start.

## **Accountability**

The City of Charles Sturt Economic Development Strategy (EDS) has been developed collaboratively with input from local businesses, industry representatives and other key stakeholders to ensure long term sustainable and inclusive growth for our community.

Growth in the 21<sup>st</sup> century means value-adding with knowledge-based industries. The Council is to be congratulated on the new Ngutungka (learning place) West Lakes and the recent decision to fund a Ngutungka Henley. These hubs of community learning, community connection, and empowerment to upskill the community with digital skills and lifelong learning are important foundations of a new economy.

Some courses offered at Ngutungka West Lakes offer residents tools to make use of internet retailing and promotion, small but vital businesses that interact with the global market from this Council area.

Knowledge is power in this century. We lack a university campus in our Council or even a hub of high-tech innovation. As the repurposing of the old RAH into LOT 14 shows and the Mitsubishi plant into Tonsley, older industrial manufacturing areas such as some of ours, make excellent bones to flesh out new knowledge-based industries, research hubs and entrepreneurial launch pads. Our Council needs its own centre of learning at its hub to seriously build up a knowledge-based industry with many spill-overs.

- Given that the State Government is examining a merger of universities, WACRA urges the Council to lobby and bid for a Western campus of such a body and investigate old industrial sites that could be repurposed.

The role of the Council is essentially one of deploying the flow of information more effectively and bringing economic development players together to use this information for greater economic benefit. It also is vital to work with both new Labor governments to seize new opportunities for funding and partnerships.

As outlined in the action plan, the role is largely one of facilitator, information provider, advocate and in all cases, leader.

WACRA agrees that the Council leadership role involves high intensity involvement. We support Charles Sturt being seen as a leader in many fields of local government endeavours. Be bold, use the principles in your planning documents and don't waste a day to make this Council ready for the coming years with resilience and adaptive capacity as the liveable city you are proud to be working for and we residents are proud to live in.



**6.75 SEAVIEW ROAD AND TERMINUS STREET GRANGE - NORTHBOUND BICYCLE LINK THROUGH PARTIAL ROAD CLOSURE - FOLLOW UP REPORT**

**TO** Council

**FROM:** Transport Engineer - Sara Morrison

**DATE:** 22 August 2022

**Brief**

This report discusses the outcome of a meeting held with residents regarding the capital works project to install a bicycle link through an existing partial road closure at Seaview Road and Terminus Street in Grange.

It also discusses the Department for Infrastructure and Transport's (DIT) proposal to install bicycle lanes on Military Road, in the parallel section to this Seaview Road segment (Terminus Street to Fort Street).

**Recommendation**

- 1. That Council note the proposal to relocate the bicycle link at the Seaview Road and Terminus Street intersection to the western path of Seaview Road, as requested by local residents, and endorse the plan in Appendix 1 for construction under the 2022/23 capital works 'sustainable transport infrastructure' program, subject to the receipt of a State Bicycle Fund grant.**
- 2. That staff provide comments to the Department for Transport and Infrastructure regarding their proposal to install bicycle lanes on Military Road, as per the comments in the Report section of this agenda item.**

**Status**

This report relates to or impacts upon the following Community Plan Objectives 2020-2027.

**Our Community - A strong and connected community**

People embrace healthy living, physical activity and ageing well.

**Our Liveability - A liveable City of great places**

A well-designed urban environment that is adaptive to a diverse and growing City. City assets and infrastructure are developed and enhanced on a strategic and equitable basis in collaboration with local communities and other relevant parties, including industry and government.

Drive an integrated, responsive transport system and well-maintained network of roads and paths that facilitate safe, efficient and sustainable connections.

**Our Environment - An environmentally responsible & sustainable City**

Charles Sturt is recognised as a leading partner and educator pursuing a sustainable future with our community.

**Our Leadership - A leading & progressive Local Government organisation**

The management of our city is progressive, responsive and sustainable to ensure a united and unique place for future generations.

**Relevant Council policies are:**

- Transport Plan 2016 - 2031
- Walking and Cycling Strategy
- Bike Network Action List and Map

**Relevant statutory provisions are:**

- Road Traffic Act 1961

**Executive Summary**

A project to install a bicycle link through the existing partial road closure at the intersection of Seaview Road and Terminus Street was included in the 2021/22 capital works budget (design and consultation) and the 2022/23 capital works budget (construction).

The design was sent to local residents in early 2022, and received a strong level of objection. Objections related to perceived safety concerns with the proposal and a preference for riders to use Military Road instead.

Following a number of deputations and a petition, staff met with the head petitioner, Councillor McGrath, and other residents on site and it was agreed that staff would further explore the option of relocating the bicycle link to the western path. An alternative design has now been developed and is presented for endorsement to enable construction to proceed.

Parallel to this section of Seaview Road, the DIT propose to install bicycle lanes on Military Road (between Fort Street and Terminus Street). This will provide a safer alternative for the riders who choose to use Military Road (during bicycle lane operation times), in addition to the option of using Seaview Road.

## Background

A project to install a short path link on Seaview Road through an existing road closure at Terminus Street, for people riding bikes to use as an alternative to travelling through a narrow travel lane, was included in the 2021/22 capital works budget (design and consultation) and 2022/23 capital works budget (construction).

The capital works project is funded by the Sustainable Transport Infrastructure budget and the State Bicycle Fund (subject to receipt of a grant).

Although the path link is a relatively low cost, low impact treatment to improve an identified safety issue, strong community objections were received from nearby residents who raised safety concerns with the proposed design and their preference for riders to be using other streets. Staff met with residents to discuss their concerns but were unable reach an agreement at the time on a preferred outcome and as a result a report was presented to the Asset Management Committee seeking direction.

A report was presented to the Asset Management Committee at the meeting on 20 June 2022 (refer AM 20/06/2022, item 4.39) regarding the Seaview Road and Terminus Street bicycle link project. At the same meeting, deputations were heard from Dr Bruce Foster and Mr Fabian Ravalico (refer AM 20/06/2022, items 3.01 and 3.03 respectively).

The motion made at the Asset Management Committee meeting was subsequently amended by Council at the meeting on 27 June 2022, after a deputation was received from Mr Don Lewis (refer CL 27/06/2022, item 4.19) and a petition was received from Dr Bruce Foster (refer CL 27/06/2022, item 5.07). The motions made include:

- 1. That Council note the concerns raised for road safety at the intersection of Seaview Road and Terminus Street by the RAA and community members, requesting a bicycle path link so riders aren't required to ride through a narrow one way lane.**
- 2. That Council note the alternative of widening the path is problematic for reasons not limited to the existing tree, traffic island configuration and stormwater.**
- 3. That Council note the one way bicycle path link through the partial road closure at the intersection of Seaview Road and Terminus Street, contained within Appendix 2, has been designed as a low cost safety treatment, and a letter sent to local residents.**
- 4. That Council note the objections received from residents who live on the section of Seaview Road between Terminus Street and Fort Street.**
- 5. That, subject to the receipt of a funding contribution (e.g. a State Bicycle Fund grant) toward the construction, and subject to a Council contribution being allocated in a capital works budget, Council endorse the construction of the bicycle path link through the partial road closure of Seaview Road at Terminus Street, contained within Appendix 2, for construction.**
- 6. That prior to finalising the detailed design and commencing construction of the bicycle link staff meet with Grange Ward Councillors and residents who have raised concerns about the design to discuss their concerns (including the report**

from Dr Bruce Foster). Staff to consider whether any amendments to the design are required after consultation with the Ward Councillors and residents and a report be brought back to the Council meeting of 22 August 2022.

7. That staff commence investigations into options to improve cycling conditions and cycling access on the section of Seaview Road between Fort Street and Bournemouth Street and subject to outcomes of these investigations a budget bid be submitted for the 2023/24 financial year to progress any recommended actions.

## Report

This report responds to recommendation 6 made at the Council meeting on 27 June 2022 (refer CL 27/06/2022, item 5.07), regarding the Seaview Road and Terminus Street bicycle link path and also provides notification of State Government plans to install new bicycle lanes on Military Road.

### Seaview Road and Terminus Street Bicycle Link

Following the meeting of Council on 27 June 2022, the design of the bicycle link was placed on hold. Staff met with Grange Ward Councillor Sarah McGrath and residents, to discuss their concerns on site. The meeting was arranged with staff and Dr Bruce Foster, who also invited other neighbours to attend.

At the meeting, residents expressed a preference for the western path to become a shared use path, rather than installing a separate bicycle link through the road closure.

While this option combines pedestrian and cycle movements, where there is an option to separate them, and it also removes an on-street parking space, the option is recommended as it provides an alternative route through the partial road closure for those cyclists that are not confident using the road and it is understood that the nearby residents are generally comfortable with this solution.

The new design is shown schematically in **Appendix 1**. Given that this is a shared path option, rather than a separated option, the 'bicycle exempt' signs are proposed to remain on the entrance to the partial road closure, enabling riders to use the roadway when safe to do so, and in times of high pedestrian activity. This is consistent with the advice of DIT, after the design was referred to them as a proposed funding partner for comment, who have requested that the 'bicycle exempt' signs remain.

### Military Road bicycle lane

The DIT are resurfacing Military Road between Grange Road and Trimmer Parade. As part of the resurfacing and re-linemarking work, and following our enquiry about bicycle lanes for this section, DIT have decided to propose bicycle lanes on the section between Fort Street and Terminus Street.

The DIT proposed bicycle lanes would operate Monday to Friday from 7.30am to 9am and 4.30pm to 6pm in both directions and existing on-street parking would be restricted during these hours, if two vehicle travel lanes are retained in each direction. Outside of the bike lane operating times, vehicles would be permitted to park in the kerbside lane.

DIT are undertaking a parking survey along Military Road between Fort Street and Terminus Street in term 3 of the school year, and undertaking some analysis prior to going out for community consultation.

The new bicycle lanes would connect to the existing bicycle lanes on Military Road to the north of Fort Street. Extending the bicycle lanes to Terminus Street will connect the northern section of Military Road to the Grange Greenway, which is a strategic cycle route that runs along Terminus Street.

As discussed in the previous report about the Seaview Road and Terminus Street bicycle link path project (refer AMC 20/6/22, item 4.39), bicycle lanes on Military Road do not negate the need for a safe bicycle link through the road closure at the intersection of

Seaview Road and Terminus Street. It is important to ensure that our bike riders have a choice in the route they take, and that we provide options for different types of riders, and safe treatments to enable riders to negotiate traffic control devices such as partial road closures.

The proposed bicycle lanes would improve safety for riders who choose to ride on Military Road, during bicycle lane operation times, by removing parked vehicles from their riding path. Removing parked vehicles from the left travel lane reduces the risk of door-opening crashes (when a driver of a parked vehicle opens their car door into the path of a rider), as well as side-swipe/rear-end cycle crashes (when a rider is riding around a parked vehicle and the driver behind them fails to give way).

Resurfacing and new line-marking work (including the bicycle lane installation, if it goes ahead) is planned to occur between September - December 2022.

Previous comments provided by Council to DIT in relation to bicycle lanes on other arterial roads include:

- Wherever possible, bicycle lanes are installed between the left general travel lane and parking so they can operate 'at all times'.
- Where this is not possible, that bicycle lanes operate only in the direction of the travel peak and only during the travel peak period. Bicycle lanes adjacent kerb sides operating in both directions should only be considered when cycling demand is 'high' in each direction.
- That where operating times are extended the operating hours only be applied to bicycle lanes adjacent kerbsides when cycling demand is 'high'.
- That all efforts are made to consult with businesses and residents to assess and provide alternative parking arrangements that may minimise adverse impacts including constructing on-site parking, additional driveway entrances, or improved parking arrangements in nearby local streets.
- That DIT officers advise Council one week before bicycle lane installation commences.
- That DIT officers audit the state of the road surface in the proposed location of the bicycle lanes and undertakes any required maintenance at the time of implementing the changes to further improve the safety of cyclists.

It is proposed that Council also provide these same comments to DIT in relation to their bicycle lane proposal for Military Road. It is not proposed to provide a further report to Council regarding this matter.

### Financial and Resource Implications

There are no financial or resource implications to these recommendations.

#### Seaview Road and Terminus Street Bicycle Link

The alternative bicycle link is expected to be delivered within the same budget as the previous option. The budget is \$40,000 and is included in the 2022/23 budget as part of the Sustainable Transport Infrastructure capital works program. It is 50% funded by Council (\$20,000) and 50% funded by the State Government (\$20,000) under the State Bicycle Fund (subject to receipt of a grant).

#### Military Road bicycle lane

There are no cost implications to Council for this DIT proposal to install new bicycle lanes on Military Road. Council are responsible for issuing expiations for parking offences within the bicycle lanes however no additional resources would be required as a result of this change.

### Customer Service and Community Implications

#### Seaview Road and Terminus Street Bicycle Link

The option of a shared path on the western side of Seaview Road, to provide bicycle riders with an alternative to using the roadway, appeases the majority of concerns raised by nearby residents.

The shared path option still provides a suitable alternative access for riders, rather than them needing to use the one-way southbound roadway.

#### Military Road bicycle lane

Under the DIT proposal, the residents who live on Military Road between Fort Street and Terminus Street, and visitors to the area, may no longer be able to park during bicycle lane operation times, unless the road is narrowed to one travel lane in each direction. DIT are undertaking a parking survey prior to proceeding, as well as consulting with nearby residents.

Comments provided to DIT in the dot points above (Report section) regarding parking and operation times of the bicycle lane may result in the reduction of one travel lane to retain on-street parking if parking is in high demand, and there is capacity within the road network to reduce this section of Military Road to one lane without adverse impacts on traffic. The section of Military Road south of Terminus Street is already one travel lane in each direction.

### Environmental Implications

#### Seaview Road and Terminus Street Bicycle Link

The new proposal involves excavation close to an existing established Norfolk Island pine tree. The construction will require monitoring of the excavation around the tree roots, and may result in the path being narrowed to a pinch point at this location if there are structural tree roots near the ground surface.



**Community Engagement/Consultation (including with community, Council members and staff)**

Staff and Councillor McGrath met with the head petitioner, Dr Bruce Foster, and neighbours invited by Dr Foster, on Friday 22 July. The modified plan (**Appendix 1**) was then emailed to Dr Foster on 28 July 2022.

Due to the minor nature of this proposal, the bicycle riding community and Bicycle User Groups have not been consulted.

DIT are undertaking consultation on the proposed Military Road bicycle lanes.

**Risk Management/Legislative Implications**

There are no risk management or legislative implications.

**Conclusion**

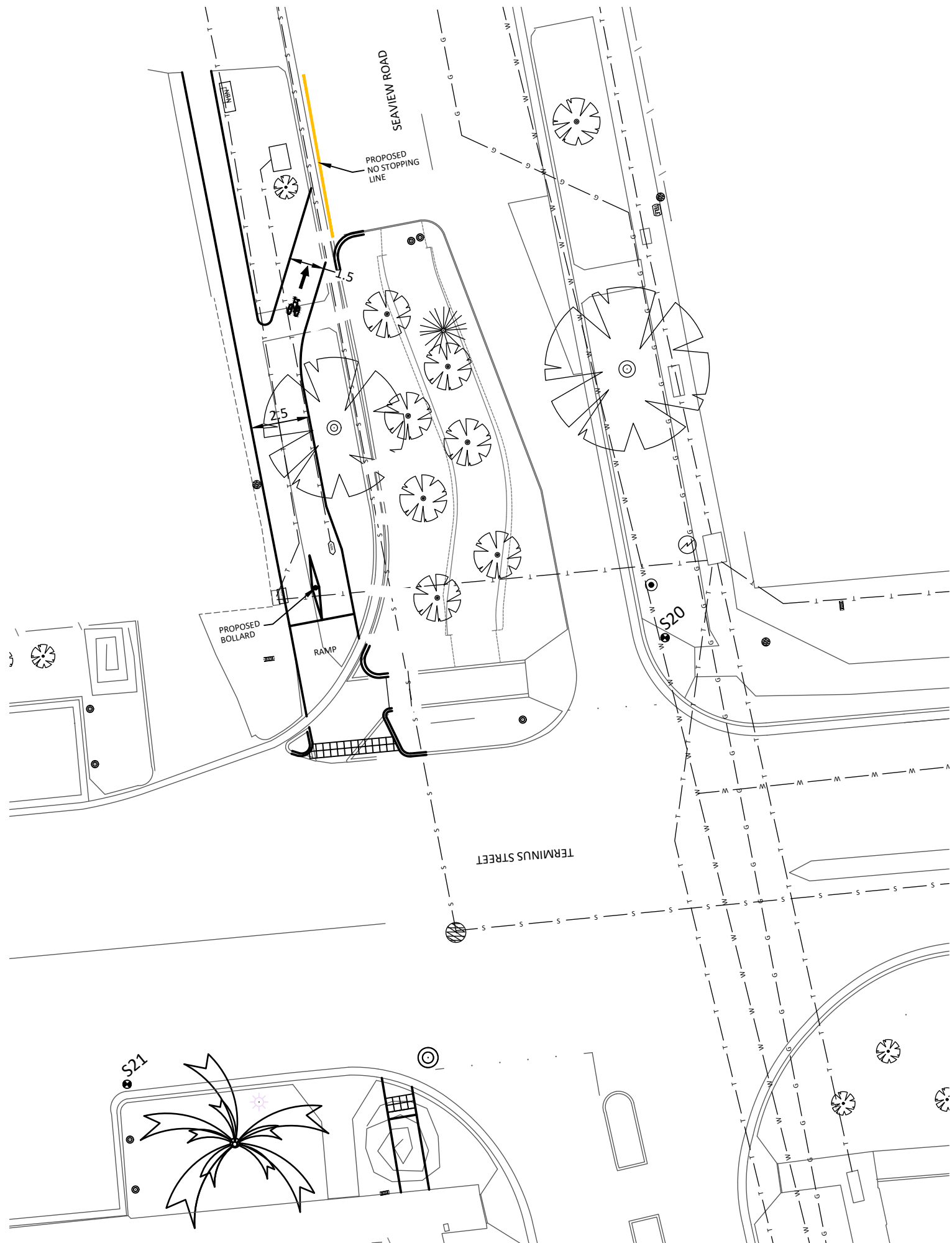
A modified version of the bicycle link through the road closure at the Seaview Road and Terminus Street intersection is proposed to help mitigate concerns of nearby residents.

DIT are undertaking consultation on bicycle lanes on Military Road, with a proposal to extend them from Fort Street to Terminus Street.

**Appendices**

#	Attachment
1	Appendix 1 - Seaview Road and Terminus Street Bicycle Link

# APPENDIX 1



**6.76 STATUTES AMENDMENT (LOCAL GOVERNMENT REVIEW) ACT 2021 - LEGISLATIVE UPDATE - ELECTION RELATED AMENDMENTS AND UPDATES**

**TO** Council

**FROM:** Team Leader Governance and Business Support - Mary Del Giglio

**DATE:** 22 August 2022

**Brief**

On the 7 July 2022, the Governor proclaimed relevant sections of the Statutes Amendment (Local Government Review) Act 2021 that make amendments to sections of the Local Government (Elections) Act 1999, effective on the same day of proclamation. This report provides a summary of the changes.

**Recommendation**

**That Council notes the amendments to the Local Government (Elections) Act and associated Regulations that commenced on 7 July 2022.**

**Status**

This report relates to or impacts upon the following Community Plan Objectives 2020-2027.

**Our Leadership - A leading & progressive Local Government organisation**

Open and accountable governance.

**Relevant Council policies are:**

- Nil

**Relevant statutory provisions are:**

- Local Government (Elections) Act 1999
- Local Government (Elections Regulations 2010

**Background**

The first proclamation made by the Governor on [16 September 2021](#) set out two commencement dates largely related to the Local Government (Elections) Act 1999 and also listed sections of the Review Act that were suspended from operation until a day and time fixed by subsequent proclamation.

On the [7 July 2022](#) the Governor proclaimed (the fourth proclamation) the commencement of a handful of these suspended provisions to come in to operation on the same date.

## **Report**

The following amendments to the Local Government (Elections) Act 1999 and associated Regulations are set out below, as a result of the proclamation made by the Governor 7 July 2022:

### **Local Government (Elections) Act 1999**

#### **Section 6(2)(c) (New)**

Expands the section on supplementary elections (casual vacancies) by inserting a new section which allows for a vacancy to be filled within 12 months after the conclusion of a periodic election or for the purposes of a designated supplementary election (after the close of nominations but before the conclusion of that election), and filled in accordance with Section 6A. This does not apply for Mayoral vacancies or uncontested elections.

#### **Section 6(4a) and (4b) (New)**

These provisions further outline the steps to be taken to fill a vacancy following a designated supplementary election and subsequent vacancies and sets out the Returning Officers (Electoral Commissioner) obligations for public notice.

#### **Section 6(8) (New)**

This section inserts the definition of a "designated supplementary election". For a Council with Wards, means a supplementary election held to fill a position/s within the ward.

#### **Section 6A (New)**

This section sets out the steps to be taken by the Returning Officer to fill a vacancy in certain circumstances, and as outlined in Section 6. The Returning Officer must determine the candidate in the most recent election and must ascertain whether the candidate is still willing/eligible to be elected to the relevant office. The time frames for this process to occur are also set out within these provisions. This does not apply to vacant Mayoral positions.

#### **Section 25(1a) (New)**

This relates to uncontested elections and new provisions to allow for designated supplementary elections and subsequent vacancies that occur before the issue of voting papers and where the number of candidates does not exceed the number of positions to be elected. This does not apply to vacant Mayoral positions.

#### **Section 55A(2) (Amendment)**

This section has been substituted to afford similar provisions as the above allowing the Returning Officer to ascertain the next candidate and whether that candidate is still willing and eligible for the relevant office, in the instance where a successful candidate dies.

### **Local Government (Elections) Regulations 2010**

#### **Regulation 3A (New)**

This regulation sets out the responsibilities of the Returning Officer and specific method to fill a vacancy in certain circumstances, including determining the next successful candidate, contacting candidates, receiving declarations from candidates and recounting votes (if required).

**Regulation 5 (Amendment)**

This regulation relates to the "Manner in which nominations are made" and has been amended to allow a candidate profile of up to 1000 characters (updated from 150 characters in 2018). The amended regulation excludes from the 1000 character count:

- candidate contact details;
- statement as to whether the candidate lives in the ward of the council in which they are nominating;
- political party membership (within 12 months of nomination), and if so, name of the party and date if ceased being a Member

**Regulation 10A (New)**

Similar to Regulation 3A, this new regulation sets out the responsibilities of the Returning Officer and specific methods to fill a vacancy in the circumstance where a successful candidate dies.

**Local Government (General) Regulations 2013****Regulation 25A (New)**

This regulation relates to report under separate cover "Item 6.73 - Local Government Election Signs", and sets out the prescribed circumstances in which an electoral advertising poster can be exhibited. I.e. content promotes the elections but is general in nature and published by ECSA, LGA or a Council.

**General Election Update/Changes and Key Dates**

<b>2022 Council Election Timetable</b>	
Supplementary Roll Opens	1 January 2022
Roll Close	5pm Friday 29 July 2022
Nominations Open	Tuesday 23 August 2022
Candidate Briefing Session (Council Chambers)	Wednesday 24 August 2022
Nominations Close	12pm Tuesday 6 September 2022
<a href="#">Caretaker Policy</a> is enacted (until the conclusion of the election)	12pm Tuesday 6 September 2022
Ballot Draw (at Civic Centre)	4pm Tuesday 6 September 2022
Mail Out Voting Material (ECSA)	Friday 14 to Thursday 20 October 2022
Last day for postal and personal issue/re-issue of voting material (ECSA)	5pm Thursday 3 November 2022
Close of Voting (Polling Day)	5pm Thursday 10 November 2022
Scrutiny and Count (at Civic Centre)	9am Saturday 12 November 2022

**Nomination Process**

2022 will see a new format for lodgement of nomination forms, with responsibility for management of the nomination process moved to the Electoral Commission of SA. ECSA have advised that their preferred method for lodgement of nomination forms will be through their [on-line portal](#) which will open from 9am on Tuesday 23 August 2022. Councils have been issued with a handful of Nomination Kits and Nomination Forms for candidates that do not have the ability to access the on-line portal. These are available on request.

The on-line portal will provide candidates and ECSA with streamlined efficiencies and features in-built word count for candidate profiles, uploading capability for photographs and faster processing and communication through the ECSA acceptance process.

ECSA are highly recommending that candidates lodge their nomination form early to allow sufficient time to rectify any potential problems that may occur with a nomination/profile before nomination close. Any nominations received after the close will not be accepted.

Candidates will remain unknown and will be revealed by ECSA's District Returning Officer at 4pm on Tuesday 6 September 2022 via the Ballot Draw.

**House of Assembly/Supplementary Roll**

All nominees will be entitled to one copy of the full roll for their nominated ward from the close of nominations. With changes to legislation from reform, the roll no longer needs to be provided to candidates in a printed version. ECSA have advised their preferred method of provision is electronically in pdf format. All nominees will be provided the opportunity to advise staff what their preferred method of provision of the roll will be after close of nominations.



### **Campaign Donation Returns**

Changes have also been made to the requirements for lodgement of Campaign Donation Returns. All candidates for election must lodge two campaign donation returns with the Returning Officer (ECSA) disclosing gifts and details of persons/organisations providing these gifts.

The First return must be lodged in the period between 22 to 28 days after close of nominations (28 September to 4 October).

The second return must be lodged within 30 days after the conclusion of the election (approximately 13 December).

A large gift return must also be lodged separately for gifts in excess of \$2,500.

Further information in relation to the Campaign Donation process can be found on ECSA's website [here](#).

### **Useful Links**

It is suggested that all candidates regularly visit the following websites for updates on Local Government Elections:

[Electoral Commission of South Australia](#)  
[Local Government Association/ECSA - Council Elections](#)  
[City of Charles Sturt](#)

### **Financial and Resource Implications**

There are no financial or resource implications.

### **Customer Service and Community Implications**

There are no customer service or community implications.

### **Environmental Implications**

There are no environmental implications.

### **Community Engagement/Consultation (including with community, Council members and staff)**

There is no requirement for community engagement or consultation.

### **Risk Management/Legislative Implications**

The amendments identified are in response to the Statutes Amendment (Local Government) Review Act 2021.

### **Conclusion**

That Council notes the amendments that commenced on the 7 July 2022.

**6.77 CODE OF CONDUCT REPORT - COUNCILLOR GERARD FERRAO**

**TO** Council

**FROM:** Manager Governance and Operational Support - Kerrie Jackson

**DATE:** 22 August 2022

**Brief**

In accordance with the Council Member Code of Conduct Policy, a report is to be presented to Council on all Code of Conduct complaints. This report relates to two complaints made against Councillor Gerard Ferrao in relation to a potential breach of the Council Member Code of Conduct.

### Recommendation

1. That Council notes two complaints were received regarding Councillor Gerard Ferrao's public posts and comments on the Friends of the Duck Pond West Lakes Facebook social media page.
2. That Council acknowledges that the complaints were referred to Deputy Mayor Tom Scheffler as Mayor Evans was one of the complainants.
3. That Council acknowledges that Deputy Mayor Tom Scheffler requested the initial assessment of the complaints be undertaken by an external provider, and this assessment was undertaken by EMA Legal.
3. That Council acknowledges that Deputy Mayor Tom Scheffler accepted the initial recommendation from EMA Legal that an investigation should be undertaken as a breach may have occurred.
4. That Council acknowledges that EMA Legal were engaged to undertake the investigation under Part 2 - Behavioural complaints.
5. That Council acknowledges that the complainants and Councillor Ferrao were provided with a copy of the Initial Investigation Report and were given the opportunity to provide a response to this report.
6. That Council acknowledges that the responses provided to the Initial Investigation Report were read and considered by EMA Legal and, where applicable, have been addressed in the Final Report.
7. That Council receives the final investigation report from EMA Legal (refer Appendix 1) and accepts the findings of the investigation that Councillor Ferrao breached the following clauses:
  - 2.1 Show commitment and discharge duties conscientiously;
  - 2.2 Act in a way that generates community trust and confidence in the Council;
  - 2.3 Act in a reasonable, just, respectful and non-discriminatory way when dealing with people;
  - 2.4 Show respect for others if making comments publicly; and
  - 2.5 Ensure that personal comments to the media or other public comments, on Council decisions and other matters, clearly indicate that it is a private view, and not that of the Council;
8. That Council resolves that Councillor Ferrao is required to:
  - make a public apology for his conduct;
  - apologise to the complainants; and
  - attend training on appropriate and respectful communication.
9. That Council consider the recommendation from EMA Legal in relation to a Clause 2.23 of the Code that states *Repeated or sustained breaches of this Part by the same Council member may be referred, by resolution of the Council, to the relevant authority for a breach of Part 3* and that Council resolves:
  - Not to refer the complaint to the SA Ombudsman being the relevant authority.  
OR
  - To refer the complaint to the SA Ombudsman being the relevant authority.

**Status**

This report relates to or impacts upon the following Community Plan Objectives 2020-2027.

**Our Leadership - A leading & transformational Local Government organisation**

Open and accountable governance.

**Relevant Council policies are:**

- Council Member Code of Conduct Policy

**Relevant statutory provisions are:**

- Local Government Act 1999

**Background**

Two complaints were received against Councillor Gerard Ferrao in April 2022 regarding public posts and comments made by Councillor Ferrao on the Friends of the Duck Pond West Lakes Facebook social media page.

## Report

As Mayor Evans was one of the complainants the complaints were referred to Deputy Mayor Tom Scheffler to consider. In accordance with the Council Member Code of Conduct - Process for Dealing with Complaints, the Deputy Mayor requested that the initial assessment be undertaken by an external provider.

Kelley Jones Lawyers were engaged to undertake this assessment, however, Councillor Ferrao raised a potential conflict in relation to this engagement, and whilst there was no conflict identified by Kelley Jones, the Deputy Mayor requested another external provider be engaged to address Councillor Ferrao concerns.

EMA Legal were engaged to undertake the initial investigation and recommended that an investigation was warranted. The Deputy Mayor accepted this recommendation. EMA Legal commenced the investigation process on 11 May 2022 in accordance with the Council Member Code of Conduct.

The two complaints against Councillor Ferrao relate to public posts and comments that he made on the Friends of the Duck Pond West Lakes Facebook social media page. In summary the complainants alleged that Councillor Ferrao breached the following provisions of the Code of Conduct:

*Part 1 principles in respect to serving the best interests of the people within the community they represent, the values of integrity and accountability, and fostering community confidence and trust in local government.*

*2.1 Show commitment and discharge duties conscientiously.*

*2.2 Act in a way that generates community trust and confidence in Council.*

*2.3 Act in a reasonable, just, respectful and non-discriminatory way when dealing with people.*

*2.4 Show respect for others if making comments publicly.*

*2.5 Ensure that personal comments to the media or other public comments, on Council decisions and other matters, clearly indicate that it is a private view, and not that of the Council.*

*Part 3 Misconduct, Clause 3.2 "Perform and discharge their official functions and duties with reasonable care and diligence at all times.*

EMA Legal have completed their investigation and a copy of the Final Investigation Report is contained in **Appendix 1** to this report and a summary (verbatim) of the considerations against each of these provisions is provided below.

### **Part 1 - Principles**

The allegation stated that Councillor Ferrao's conduct breached Part 1 of the Code, however the initial assessment identified that there would not be an investigation under Part 1 as it provides higher principles and overarching statements, and does not constitute a separate enforceable standard of conduct.

## **Part 2 - Behavioural Code**

### ***2.1 Show commitment and discharge duties conscientiously***

Applying a reasonable person test, on its face the comment made by Cr Ferrao to (redacted) that is the subject of the Complaint was inappropriate. Cr Ferrao did not act with integrity. He did not demonstrate community leadership or facilitate communication between the community and Council.

The finding is that Cr Ferrao breach clause 2.1 of the Code.

### ***2.2 Act in a way that generates community trust and confidence in Council***

The Duck Pond Facebook group has over 800 members. The posts made were visible to the public beyond the page's membership and remained visible at the time of preparing the Final Report. It is evident from the comments made in response to Cr Ferrao's comment (Attachment 2) that Cr Ferrao's comment did not generate community trust and confidence in the Council or in him as a representative of Council.

The finding is that Cr Ferrao breached clause 2.2 of the Code.

### ***2.3 Act in a reasonable, just, respectful and non-discriminatory way when dealing with people***

When considering the tone and content of Cr Ferrao's post, I consider the response to (redacted) was not 'made in the most respectful manner considering how she spoke with me at first instance.'

Based on the information before the Investigator, Cr Ferrao's response to (redacted) was inappropriate and unprovoked. It was not reasonable, just or respectful in the circumstances. The comments made by (redacted) to Cr Ferrao were more vociferous. It is unknown why Cr Ferrao's response to (redacted) was more muted and to (redacted), on balance, offensive. It has been suggested in the course of the investigation by the Complainants that Cr Ferrao's different approach was gender based. The Investigator considers it unnecessary to decide that matter, having found that the response was in breach of the Code, and draws no conclusion to that effect. The Investigator has, as part of the investigation, verified (redacted) assertion that Cr Ferrao is a White Ribbon Ambassador via Cr Ferrao's public LinkedIn page.

Cr Ferrao did treat (redacted) differently to (redacted). In treating (redacted) differently Cr Ferrao acted in a discriminatory way in the sense of a level of unfairness and differential treatment when dealing with (redacted).

The finding is that Cr Ferrao breached clause 2.3 of the Code.

### ***2.4 Show respect for others if making comments publicly***

On its face the comment was not respectful and did not show respect to (redacted) .

The finding is that Cr Ferrao breached clause 2.4 of the Code.

### ***2.5 Ensure that personal comments to the media or other public comments, on Council decisions and other matters, clearly indicate that it is a private view, and not that of the Council.***

To the extent that the post made by Cr Ferrao about Council's decision, and also the comment to (redacted) were personal comments Cr Ferrao did not identify his originating

post or comment to (redacted) as a private view, and not that of Council.

The finding is that Cr Ferrao breached clause 2.5 of the Code.

### **Part 3 - Misconduct**

It was alleged that Councillor Ferrao's breached Clause 3.2 *"Perform and discharge their official functions and duties with reasonable care and diligence at all times"* and a breach under this part of the code must be referred to the Ombudsman or the Office of Public Integrity. EMA Legal considered this as part of the initial assessment and made the determination that a referral to the Ombudsman or the Office of Public Integrity was not required.

As part of the investigation EMA Legal were provided with a copy of 2021 investigation report of Councillor Ferrao that found Councillor Ferrao had breached clause 2.3 of the Code. The investigator placed no weight on the detail of the report but has determined that the findings should be noted for the purpose of this Final Report and its recommendations.

Part 2.23 of the Code states *"repeated or sustained breaches of this Part by the same Council member may be referred, by resolutions of Council, to the relevant authority as a breach of Part 3*. As the findings in the Final Report conclude that Councillor Ferrao has breached Part 2 of the Code, and Councillor Ferrao has done so previously, a complaint could be referred to the relevant authority, that being the Ombudsman, as a breach of Part 3 of the Code. Council will need to consider and determine if this is an appropriate course of action to take.

The Deputy Mayor received a copy of the final report on 9 August 2022 and informed all parties that the report will be presented to the Council at the meeting of 22 August 2022.

The Council Member Code of Conduct (clauses 2.24) states as a breach has been found, it must now be the subject of a report to a public meeting of Council and further to this (clause 2.25) states if, following an investigation under the Council's complaints handling process, a breach of the Behavioural Code by a Council Member is found, the Council may, by resolution:

1. Take no action;
2. Pass a censure motion in respect of the Council member;
3. Request a public apology, whether written or verbal;
4. Request the Council member to attend training on the specific topic found to have been breached;
5. Resolve to remove or suspend the Council member from a position within the Council (not including the member's elected position on Council);
6. Request the member to repay monies to the Council.

The Council's Process for Dealing with Complaints requires that this public report is presented to Council within 2 meetings of the report being finalised therefore this reports needs to be considered by Council at this meeting of 22 August 2022.

### **Finding Recommendations**

EMA Legal has recommended the following:



*It is a matter for Council to consider what action, if any, it wishes to take in response to this Final Report. My recommendation is that the following occur:*

- *Council require Cr Ferrao to issue a public apology for his conduct and an apology to [REDACTED].*
- *Council require Cr Ferrao to attend training on appropriate and respectful communication.*
- *Council consider whether, by resolution of Council, Cr Ferrao's conduct should be referred to the relevant authority under Part 2, clause 2.23 of the Code.*

#### **Financial and Resource Implications**

The cost to undertake the independent investigation of this complaint is currently \$13,000.00.

#### **Customer Service and Community Implications**

Open and transparent reporting of Code of Conduct complaints, the action taken and the resolution is in accordance with the Council Member Code of Conduct Process for Dealing with Complaints.

#### **Environmental Implications**

There are no environmental implications.

#### **Community Engagement/Consultation (including with community, Council members and staff)**

There is no requirement for Community engagement or consultation.

#### **Risk Management/Legislative Implications**

This potential breach of the Council Member Code of Conduct has been managed in accordance with the Code and its process for dealing with complaints.

#### **Conclusion**

It is recommended that Council consider the findings and recommendations of the Final Investigation Report from EMA Legal in relation to the two Code of Conduct complaints received against Councillor Ferrao and determine what actions Councillor Ferrao is required to undertake.

#### **Appendices**

#	Attachment
1	Appendix 1 - Code of Conduct Report - Cr Ferrao

# APPENDIX 1

# EMA LEGAL

## Final Investigation Report

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<b>Complainants:</b>	<b>Mayor Angela Evans</b> [REDACTED]
<b>Council member:</b>	<b>Councillor Gerard Ferrao</b>
<b>Council:</b>	<b>City of Charles Sturt</b>
<b>Issues:</b>	<b>Alleged breach of Part 2 – Code of Conduct for Council Members</b>
<b>Dated:</b>	<b>2 August 2022</b>

### A. Introduction

The Complainants allege a breach of the Code of Conduct for Council Members (**the Code**)<sup>1</sup>. The allegations are made against Councillor Gerard Ferrao in respect of alleged breaches of Part 2 of the Code, in particular Clauses 2.1, 2.2, 2.3, 2.4 and 2.5.

EMA Legal has been engaged to carry out an independent investigation of the allegations on behalf of Council, for consideration and, as appropriate, action.

An initial investigation identified possible breaches of the Code by Cr Ferrao (**Respondent**). It also recommended an investigation to clarify the factual course of events and apply the relevant provisions of the Code which has since taken place.

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<sup>1</sup> made pursuant to section 63 of the *Local Government Act 1999*.

## B. Investigation Process

The investigation has involved:

- An initial desk top assessment assessing the written information provided by the Complainants and Council.
- An investigation by Ms Sue Porter (**Investigator**) of the matters raised by the Initial Assessment.
- An interview with the Complainants via Microsoft Teams.
- Considering all information provided to the Investigator
- Preparing the Preliminary Report for distribution to the Complainants and Cr Ferrao, for comment
- Consideration of feedback received in relation to the Preliminary Report; and
- Preparation and provision of this Final Report

## C. Standard of Proof

The standard of proof applied is the balance of probabilities. It is important to recognise that findings are not the result of any arbitral or court process. They are the product of an inquisitorial process, and an assessment of the likelihood of whether a matter did or did not occur.

## D. Relevant Law and aspects of the Code

1. Section 63 of the *Local Government Act 1999 (Act)* requires Council members to observe the Code.
2. Part 2 of the Code of Conduct concerns behaviours, and the following extracts are of relevance to this investigation:

### **General Behaviour**

- 2.1. *Show commitment and discharge duties conscientiously.*
- 2.2. *Act in a way that generates community trust and confidence in the Council.*
- 2.3. *Act in a reasonable, just, respectful and non-discriminatory way when dealing with people.*
- 2.4. *Show respect for others if making comments publicly.*
- 2.5. *Ensure that personal comments to the media or other public comments, on Council decisions and other matters, clearly indicate that it is a private view, and not that of the Council.*

## E. Documents

The documents received and considered as part of this investigation are as follows:

- City of Charles Sturt 'Council Members Code of Conduct Policy'
- Code of Conduct Complaint sent to Ms Kerrie Jackson, Manager Governance and Operational Support by Mayor Angela Evans on 19 April 2022 and associated correspondence
- Code of Conduct Complaint sent to Chief Executive Officer Paul Sutton by [REDACTED] on 29 April 2022 and associated correspondence
- Emails from Deputy Mayor Tom Scheffler to Cr Ferrao, 'Code of Conduct Complaint', 22-23 April 2022
- Document sent by Cr Ferrao to Deputy Mayor Tom Scheffler, 'Code of Conduct Complaint and Preliminary Investigation by Tom Scheffler into Gerard Ferrao', 28 April 2022
- Emails from Kerrie Jackson to Mayor Angela Evans, [REDACTED] and Cr Ferrao, 'Code of Conduct', 2 May 2022
- Additional screenshots of Facebook posts provided by [REDACTED], 26 May 2022
- Emails from the Complainants and Respondent
- 'Final Investigation Report, Code of Conduct for Council Members, City of Charles Sturt, Subject Member: Councillor Gerard Ferrao', prepared by Minter Ellison, undated
- City of Charles Sturt 'Recognition of Service Policy Council Members, Freeman, Freedom and Keys to the City' (revoked)
- City of Charles Sturt 'Civic Recognition and Events Policy'
- Correspondence subject to legal professional privilege under promise this privilege would not be waived;
- Commentary in response to provision of the Preliminary Report

## F. Background

1. The Complainants are Mayor Angela Evans and resident [REDACTED].
2. The two complaints are made in respect of a post and comments made by Cr Ferrao on the Friends of the Duck Pond West Lakes (Freshwater Botanic Lake) Facebook (**Duck Pond Facebook**) page on the evening of Monday 11 April 2022 and/or early hours of Tuesday 12 April 2022 (**Complaints**).
3. On 12 April 2022 Council staff brought Facebook comments attributable to Cr Ferrao to the attention of the Mayor.
4. On 12 April 2022 [REDACTED] contacted Chief Executive Officer Paul Sutton with respect to the Code of Conduct process.
5. On 19 April 2022 Mayor Evans raised a Code of Conduct complaint in relation to the comments.
6. On 22 April 2022 Cr Ferrao was advised of Mayor Evans' complaint and that this would be referred to Kelledy Jones Lawyers for an initial assessment.

7. On 28 April 2022 Cr Ferrao raised concerns that he would not receive a fair assessment if the matter were investigated by Kelledy Jones Lawyers.
8. On 29 April 2022 [REDACTED] raised a Code of Conduct complaint in relation to the comments.
9. On 4 May 2022 Council requested EMA Legal undertake an initial assessment.
10. On 9 May 2022 EMA Legal provided Council with the initial assessment.
11. On 11 May 2022 Council instructed EMA Legal to undertake an investigation into the Complaints.
12. During the course of this investigation [REDACTED] and Mayor Evans raised historical matters regarding Cr Ferrao, and Cr Ferrao about [REDACTED]. To the extent these are relevant they have been referenced in this report.

## G. Complainants' Concerns

### *Summary of Complainant's Grievances*

1. The essence of the Complainants' concern is the content of Cr Ferrao's post and comments on Facebook.
2. At the Council meeting of 11 April 2022, Council voted unanimously to amend the project scope for the review of Freshwater Lake at West Lakes. Cr Ferrao declared a perceived conflict of interest as he is a member of the Duck Pond Facebook group.
3. It is reported that after the meeting Cr Ferrao made a post from his personal Facebook account on the Duck Pond Facebook page that stated (in part):

*'I voted tonight at the City of Charles Sturt council chambers to save the duck pond!  
As local councillor I am delighted to be able to preserve this great amenity for  
residents and future generations at west lakes.'*

4. Comments were made in response to Cr Ferrao's post, including by [REDACTED].
5. In response to [REDACTED] post, Cr Ferrao wrote in reply:

*[REDACTED] you seem to have a lot of hate inside you....  
Have you thought of seeking a medical opinion and/or taking anger management  
classes...'*

6. [REDACTED] alleges that Cr Ferrao's conduct in making the post and comment breached the following behavioural provisions of the Code:

- a. *Clause 2.1: Show commitment and discharge duties conscientiously.*
  - b. *Clause 2.2: Act in a way that generates community trust and confidence in the Council.*
  - c. *Clause 2.3: Act in a reasonable, just, respectful and non-discriminatory way when dealing with people.*
  - d. *Clause 2.4: Show respect for others if making comments publicly.*
  - e. *Clause 2.5: Ensure that personal comments to the media or other public comments, on Council decisions and other matters, clearly indicate that it is a private view, and not that of the Council.*
13. Mayor Evans alleges that Cr Ferrao's conduct in making public comments on Facebook breached the following behavioural provision of the Code:
- a. *Clause 2.1: Show commitment and discharge duties conscientiously.*
14. [REDACTED] also alleges that Cr Ferrao's conduct breached the Code's:
- a. Part 1 principles in respect to serving the best interests of the people within the community they represent, the values of integrity and accountability, and fostering community confidence and trust in local government.
  - b. Part 3 Misconduct, Clause 3.2 '*Perform and discharge their official functions and duties with reasonable care and diligence at all times*'.

## Evidence of the Complainants

- [REDACTED]
15. The Investigator met with [REDACTED] via Microsoft Teams on 26 May 2022.
16. [REDACTED] appeared to present openly and honestly in the meeting.
17. [REDACTED] advised the Investigator that she had been an elected member of Council from 2010 - 2014. She advised she knew Cr Ferrao prior to 11 April 2022 but stated she had had little involvement with him when she was on Council and little involvement with him since.
18. [REDACTED] advised the Investigator of a half court basketball court project submitted by Cr Ferrao to Council. Whilst unrelated to the Freshwater Lake at West Lakes, [REDACTED] raised this in the context of her concerns with the manner in which Cr Ferrao treated residents.
19. [REDACTED] expressed her belief that what occurred with the Duck Pond Facebook post was a pattern of behaviour, and that Cr Ferrao's behaviour is not appropriate for a community leader.



20. With respect to the Freshwater Lake at West Lakes, [REDACTED] advised that residents became aware of issues with the lake after a letter was sent to residents with four options for community consultation. [REDACTED] did not receive the letter but once aware, investigated the issue and joined the Duck Pond Facebook group.
21. [REDACTED] advised there is a West Lakes Duck Pond Committee of which she is not a member but that she had provided some assistance to the committee members.
22. [REDACTED] advised that Cr Ferrao was posting regularly on the Duck Pond Facebook page before the Council meeting on 11 April 2022. She did not recall any comments made on Facebook by Cr Ferrao prior to 11 April 2022 that favoured one option over another.
23. On 11 April 2022 [REDACTED] read the following post made by Cr Ferrao on the Duck Pond Facebook page:

*'I voted tonight at the City of Charles Sturt council chambers to save the duck pond!*

*As local councillor I am delighted to be able to preserve this great amenity for residents and future generations at west lakes.'*

and said the comments sounded to her like Cr Ferrao was taking credit for the outcome. In her own mind she questioned why the pond hadn't been maintained and, as a result, the pond became an issue that was put before Council.

24. [REDACTED] advised she read a comment made by [REDACTED] on the Duck Pond page in response to Cr Ferrao's post:

*'Gerard Ferrao BS / you only voted against it after the local WLakes communities unexpected backlash – where were you in person during this long community protest? Now trying to hijack [REDACTED] FB site via her success notice post to access her FB 'friends' list, to self promote yourself and defacto take credit away from her and the tireless protest team, is deplorable. Grrrr! (Oh I just remembered; there's a Council election coming up!!)'*

(emoticons omitted)

25. [REDACTED] then read a comment made by Cr Ferrao in response:

*'You don't know anything about me [REDACTED] or what I have done to advance this issue inside the process.*

*I find your comment to compare Councils conduct Tonight to a group of terrorists to be an insensitive statement.*

*I took this matter*

*To Council & council agreed with me to save the ponds.*

*That's A fact.*

*So when it mattered most I took the measured and considered action necessary.'*

26. [REDACTED] advised the Investigator that she was shocked and angry with Cr Ferrao's post to a resident who 'challenged him', and said she didn't want Cr Ferrao's post and comment to detract from the achievement of the residents. As a result she made a comment on the Duck Pond page directed at Cr Ferrao:

*'Gerard Ferrao Please don't take credit because you voted for an agenda item that should never have appeared in the agenda.*

*Why didn't you vote or try to stop it going to consultation in the first place?*

*Where have you been the last 4 years to be vocal about the pond and demand to know why the pond is in such a state and hasn't been maintained?*

*Asked the questions about why the rotunda hasn't been repaired?*

*The credit lies solely with [REDACTED] and the volunteers that spent countless hours of their own time, spent their money on posters, flyers etc.....to make the community aware of what was happening. If it wasn't for these people, we wouldn't know!!!!*

*Yes [REDACTED] were excellent and raised excellent points that should have been considered by council.*

*It should not be up to the rate payers to raise the points they did tonight, this is councils bread and butter!!!!*

*So don't take credit because you stood tonight and voted for an issue that should not have been on the agenda!!!!*

*Self praise is no recommendation!!!'*

27. In response, Cr Ferrao wrote to [REDACTED]:

*[REDACTED] you seem to have a lot of hate inside you....  
Have you thought of seeking a medical opinion and/or taking anger management classes...'*

28. In response, [REDACTED] wrote:

*'Gerard Ferrao that is a very inappropriate comment from a councillor.'*

29. Resident [REDACTED] made a further comment in which he stated, amongst other things, that Cr Ferrao should be reported, suspended from Council whilst an investigation is undertaken, disciplined 'and or removed' and that [REDACTED] should receive a public apology.

30. [REDACTED] advised the Investigator that she has no relationship with [REDACTED] other than receiving a Facebook friend request from him subsequent to these events.
31. [REDACTED] advised the Investigator that Cr Ferrao made no further comments as part of this conversation, that she made no further comments to Cr Ferrao, and she has had no further communication with Cr Ferrao since that time.
32. [REDACTED] advised the Investigator that the Duck Pond page has over 800 members and expressed the view that Cr Ferrao's comments could have damaged her reputation and character.
33. [REDACTED] noted that Cr Ferrao is a White Ribbon ambassador and considered the comment on the Duck Pond page directed to her was derogatory to women. She formed the view that the comment was akin to 'I'm putting you back in your place', 'putting you back where you belong'.
34. Subsequent to the meeting on 26 May 2022 [REDACTED] provided the Investigator with screenshots of additional comments. These are provided at Attachment 1.

#### *Mayor Evans*

35. The Investigator met with Mayor Evans via Microsoft Teams on 26 May 2022.
36. Mayor Evans appeared to present openly and honestly in the meeting.
37. Mayor Evans had been made aware of the post and comments on the Duck Pond Facebook page by a Council staff member who, as part of their role, brings issues (positive and negative) to the attention of the Mayor.
38. After being made aware of the post and comments, Mayor Evans was informed that [REDACTED] had made enquiries of Council regarding lodging a complaint.
39. Mayor Evans was approached by people including elected members and governance staff with their concerns about Cr Ferrao's post and his conduct.
40. When no complaint was made by [REDACTED] within a reasonable period of time Mayor Evans lodged a complaint about the conduct of Cr Ferrao. She expressed the view that it would have been inappropriate for her to not act when she was aware of Cr Ferrao's alleged conduct.
41. Mayor Evans advised that she was on Council when [REDACTED] was an elected member. The Mayor's experience of [REDACTED] at that time was that she communicated with staff, Councillors and residents in a respectful way.
42. Mayor Evans advised the Investigator of a previous Code of Conduct complaint against Cr Ferrao in relation to the basketball court project and that findings were made against Cr Ferrao.

43. Mayor Evans considered Cr Ferrao's conduct that lead to the Complaints as discrete in its own right but that the history of Cr Ferrao's conduct and his relationship with residents was relevant for context.
44. Mayor Evans stated that some of the same residents were involved in both the Freshwater Lake and the basketball court issue.
45. With respect to Cr Ferrao's comments on the Duck Pond Facebook page, Mayor Evans considered that Cr Ferrao was seeking credit for the outcome of the Council decision.
46. Mayor Evans was aware of the comments [REDACTED] made in response to Cr Ferrao's Facebook post and questioned why Cr Ferrao 'targeted' [REDACTED]. The Mayor expressed the view that nothing in [REDACTED] comments warranted Cr Ferrao's response.
47. Mayor Evans advised the Investigator that Cr Ferrao says he is an advocate against domestic violence. She considered that in his Facebook comment he targeted a woman, without provocation.
48. Mayor Evans expressed the view that Cr Ferrao's words were intended to '*shut the comments up by gaining control of the group narrative*', that he engaged in a power play and a form of verbal oppression.
49. Mayor Evans advised that elected members may or may not have elected member Facebook accounts, and that as a principle this would be encouraged. She noted that Cr Ferrao did not indicate on Facebook that what he said was his private view, and that if he had it would not have made the comments acceptable.
50. Mayor Evans advised the Investigator that Cr Ferrao is a Freeman of the Council and that this meritorious award, although suspended whilst Cr Ferrao is an elected member, obligates behaviour.
51. Mayor Evans expressed concerns about the damage Cr Ferrao's conduct has had to the Council brand.
52. Mayor Evans considered that clauses 2.2 and 2.3 of the Code may also be relevant to the Complaints.

### **Evidence of Councillor Ferrao**

53. On 30 May 2022 Cr Ferrao was invited to meet with the Investigator as part of the investigation.
54. On 1 June 2022 Cr Ferrao advised that whilst happy to cooperate with the investigation he works full time and his position on Council is voluntary, undertaking the duties after hours. He advised he would prefer that the Investigator's questions were sent to him and he would provide a written reply.

55. On 7 June 2022 a letter was sent to Cr Ferrao outlining the allegations and areas of clarification the Investigator would like canvassed in his response. Cr Ferrao was advised that the letter did not fully reproduce the Complaints and he was encouraged to refer to the initiating complaints whilst preparing his response. He was asked to respond within 7 days.
56. On 7 June 2022 Cr Ferrao requested copies of the initiating complaints and an extension of time to prepare a response. This was agreed, and time for a response was extended until 21 June 2022.
57. On 15 June 2022 Cr Ferrao advised the Investigator that he was in isolation with Covid-19, did not want to delay the Investigation further and asked if the Investigator could rely on the submissions made to Tom Scheffler in forming a judgement.
58. On 16 June 2022 the Investigator advised Cr Ferrao that if he did not provide further submissions, reliance would be made on the document he provided to Cr Tom Scheffler on 28 April 2022. The Investigator noted there were matters raised in the correspondence of 7 June 2022 not covered in his earlier submission and that it would assist the investigation if he could provide a response that went to those matters, but that if he was unable to provide a response, an assessment would be made and the preliminary report prepared with the information before the Investigator at that time.
59. Cr Ferrao did not provide a response to the Investigator at that time. The submissions made to Deputy Mayor Scheffler in respect of the Facebook comment and post are instead summarised in this section.
60. Cr Ferrao advised that the comment made on Facebook was using his private Facebook page and not under his elected member Facebook page.
61. Cr Ferrao stated that the comment he made was in direct response to what [REDACTED] wrote to him and about him on the Duck Pond Facebook page.
62. Cr Ferrao considered he was in a conversation with other people, not with [REDACTED], and that she, without invitation, weighed into the conversation.
63. Cr Ferrao considered that [REDACTED] assaulted him verbally and made offensive, rude and hateful comments to him and about him.
64. Cr Ferrao stated that [REDACTED] made *'hateful comments about my political association(s)'*.
65. Cr Ferrao advised that he complained to Facebook who investigated commentary in the thread of communication and, as a consequence, Facebook removed a post.
66. Cr Ferrao advised Deputy Mayor Scheffler:

*'My comments on Facebook are my comments in response to a hurtful and vexatious assault from [REDACTED] who weighed into a matter, unsolicited. I could have retaliated and said a million things back to her. However, I remained respectful in my response. I merely asked [REDACTED] why she*

*carries so much hate inside her and suggested that she seek a professional opinion and/or possibly inform a treatment plan.'*

67. Cr Ferrao stated that the *'authority to investigate this matter was Facebook and they have investigated this matter. The matter is closed.'*
68. Cr Ferrao raised concerns with the treatment of elected members and questioned Council's protection for elected members *'who are the subject of obscene comments made about them by members of the public'*.
69. Cr Ferrao raised concerns with [REDACTED] comments as a 'Save Saint Clare Campaigner' in 2009 and how this reflected negatively on Council, and also [REDACTED] tactics when an elected member between 2010 and 2014.
70. Cr Ferrao stated that [REDACTED] had gone 'unchecked' by Council for 12 years, and that Council was incapable or unwilling to protect its elected members.
71. Cr Ferrao considered his Facebook post to [REDACTED] was *'made in the most respectful manner considering how she spoke to me at first instance'*.

## Responses to the Preliminary Report

72. The Complainants and Respondent were provided with an opportunity to respond to the Preliminary Report by close of business 18 July 2022. [REDACTED] availed herself of that opportunity. Mayor Evans responded and advised that she had nothing further to contribute.
73. Cr Ferrao contacted the Investigator on 20 July 2022 and requested an extension of time until early the following week to provide a response. He did not provide an explanation as to why he was unable to respond during the 7 day period afforded the Complainants and Cr Ferrao, other than to say an extension would provide him with the weekend to consider the Preliminary Report as he undertakes his Council duties over the weekend.
74. The Council Members Code of Conduct Policy provides that this Report is to be finalised within 7 days of submissions to the draft or preliminary report being due.
75. I carefully considered Cr Ferrao's request and discussed the request with Council. I advised Cr Ferrao on 20 July 2022 that an extension was granted until 9am 25 July 2022, noting the timeframes within the Council Members Code of Conduct Policy, that he had requested an extension after the closing time for responses, did not provide a reason for being unable to respond, and had already had one weekend to consider the report.
76. Further, Cr Ferrao was advised that if the Investigator did not have his response by 9am 25 July 2022 we would then proceed to finalise the report for Council, and that no further extension of time would be granted.
77. Cr Ferrao provided a response to the Preliminary Report before 9am on Monday 25 July 2022.

78. [REDACTED] was advised of the extension afforded Cr Ferrao and given the same extension of time, should she wish to use it. [REDACTED] did not provide an additional response.
79. The responses to the Preliminary Report have been read and considered in full. This report summarises the pertinent points and addresses those responses to the extent they took issue with passages, analysis and findings in the Preliminary Report.
80. [REDACTED] response is primarily concerned with the information Cr Ferrao provided to Cr Scheffler on 28 April 2022. In summary, [REDACTED] submits:
- a. it was open to anyone to respond to Cr Ferrao's Facebook post as his comment was *'open to all to respond', 'general and not sent or tagged for a particular person'*;
  - b. she *'did not assault him verbally' nor was I 'offensive, rude and hateful to him',* which she stated is *'a complete lie and needs to be retracted'*.
  - c. she did not mention Cr Ferrao's political associations, that *'this is a complete lie and needs to be retracted'*;
  - d. she would like to see evidence if the Facebook posts have been removed and/or that Facebook investigated the matter, is unsure whether Cr Ferrao was referring to his post or her comment which Facebook had removed, and that as at 12 July 2022 both were still visible on the Duck Pond Facebook page;
  - e. that she does not condone elected members being the subject of *'obscene comments made about them by members of the public'* and denies she made personal comments about Cr Ferrao at any time;
  - f. denies she was a 'Save St Clair Campaigner' in 2009 and questions what is meant by her "tactics" as an elected member; and
  - g. if Cr Ferrao considered his response to her was 'respectful' *'then we have a problem'*, and that the comment was targeted and insensitive considering the *'Mental Health epidemic we are facing'*.
81. In addition, [REDACTED] expressed concern that Cr Ferrao did not meet with the Investigator and considered his Facebook response 'acceptable'. She also noted that Council is not a voluntary position as elected members are remunerated.
82. In his response Cr Ferrao's raised concerns that he was denied procedural fairness, did not read the entire complaint until receiving the Preliminary Report, and that he received inconsistent communication from Cr Scheffler as to who is/was the Complainant(s) and the nature of the Complaint.
83. Cr Ferrao advised that Facebook removed certain posts from their pages and that anyone who viewed the comment that forms the basis of the Complaint would be viewing a screenshot. He advised that Facebook contacted [REDACTED] and [REDACTED] in late April 2022 and asked them to *'stop their hateful comments and general observations to me and about me'*, and that the investigation should be extended to *'the owners of the Facebook page and administrators of Facebook'*. He questioned the inclusion of some Facebook comments in the Preliminary Report (Attachment 1) and requested the inclusion of all Facebook threads between himself and [REDACTED] *'which are relevant in context to this complaint'*.



84. Cr Ferrao expressed concern that commentary by the Complainant included in the Preliminary Report questioned whether his comments were sexist or abusive towards women, and he refuted an inference that this is the case.
85. The Investigator contacted Cr Ferrao on 25 July 2022 and asked him to provide details around the Facebook investigation and the communication he advised occurred between Facebook, [REDACTED] and [REDACTED], noting that he had been asked on 7 June 2022 for information that goes to the Facebook investigation, and this had not been provided. The Investigator advised Cr Ferrao the Facebook posts were still accessible on Facebook and the Investigator had been unable to identify the dialogue to which Cr Ferrao referred.
86. On 25 July 2022 Cr Ferrao asked the Investigator to contact the administrator for the Duck Pond Facebook page to make enquiries about the posts that had been removed and previous conversations concerning Cr Ferrao and [REDACTED].

#### *Further enquiries*

87. On 26 July 2022 the Investigator spoke with the Facebook administrator for the Duck Pond Facebook page (**Facebook administrator**) who asked the Investigator for anonymity. The administrator advised they have had concerns with some of the posts made on the Duck Pond Facebook page and that this had been raised and addressed as needed with the people making comment. The administrator advised that Cr Ferrao had asked for certain posts to be removed from the page including in relation to the comments being made late on 11 April 2022/in the early hours of 12 April 2022, and on approximately 3 previous occasions.
88. The Facebook administrator had responded to this request by hiding rather than deleting posts. They advised the Investigator that this removed the comments from the public domain, but that the comments could still be seen by the person making the post and their Facebook friends, or if someone copied and pasted the comments into a Word document.
89. The Investigator advised the Facebook administrator that the posts were in fact still visible to the public without downloading the content. The administrator was unaware this was the case and was of the understanding the posts were no longer visible. The Investigator has no reason to disbelieve the administrator in this respect.
90. During the course of the phone conversation with the Investigator, the Facebook administrator made it known they did not want to become involved in matters that had led to the Investigator's enquiries.

#### **H. Whether Councillor Gerard Ferrao breached Part 2 of the Code of Conduct for Council Members**

91. The Investigator has considered the concerns raised by Cr Ferrao and reviewed the comments on Facebook directed towards him on 11 April and 12 April 2022. The full conversation is now provided at Attachment 2.

92. The Investigator has been unable to identify other conversations between Cr Ferrao and [REDACTED] on Facebook prior to 11 April 2022 and these have not been provided by Cr Ferrao or the Facebook administrator to the Investigator.

93. In light of the evidence gathered by the Investigator, we consider below each of the relevant Code provisions and indicate our findings.

Clause 2.1: Show commitment and discharge duties conscientiously

94. The Code requires Councillors to show commitment and discharge their duties conscientiously.

95. Section 59 of the Act provides the roles of members of councils:

(1) *The role of a member of a council is—*

(a) *as a member of the governing body of the council—*

- (i) *to act with integrity; and*
- (ii) *to ensure positive and constructive working relationships within the council; and*
- (iii) *to recognise and support the role of the principal member under the Act; and*
- (iv) *to develop skills relevant to the role of a member of the council and the functions of the council as a body; and*
- (v) *to participate in the deliberations and activities of the council; and*
- (vi) *to keep the council's objectives and policies under review to ensure that they are appropriate and effective; and*
- (vii) *to keep the council's resource allocation, expenditure and activities, and the efficiency and effectiveness of its service delivery, under review; and*
- (viii) *to ensure, as far as is practicable, that the principles set out in section 8 are observed; and*
- (ix) *to participate in the oversight of the chief executive officer's performance under the council's contract with the chief executive officer; and*
- (x) *to serve the overall public interest; and*

(b) *as a person elected to the council—to represent the interests of residents and ratepayers of the council, to provide community leadership and*

*guidance, and to facilitate communication between the community and the council.*

96. Cr Ferrao posted on the Duck Pond Facebook page identifying himself as an elected member stating *'I voted tonight at the City of Charles Sturt council chambers' and 'As local councillor I am ....'*
97. Communication includes the interchange of thoughts.<sup>2</sup> To facilitate is to *'make easier or less difficult'*.<sup>3</sup> Facilitating communication includes receiving responses to the provision of information.
98. Integrity is *'soundness of moral principle and character; uprightness; honesty'*.<sup>4</sup>
99. While the post was made from Cr Ferrao's personal Facebook account, he identified himself as an elected member and the content of the post was in respect of what he had done as an elected member. By so doing, he brought the post within the duties of elected members, to facilitate communication between the community and Council.
100. Applying a reasonable person test, on its face the comment made by Cr Ferrao to [REDACTED] that is the subject of the Complaint was inappropriate. Cr Ferrao did not act with integrity. He did not demonstrate community leadership or facilitate communication between the community and Council.
101. The finding is that Cr Ferrao breached clause 2.1 of the Code.

*Clause 2.2: Act in a way that generates community trust and confidence in the Council*

102. The Code holds council members to a standard of conduct and behaviour that accords with community expectations.
103. Generate means to *'bring into existence; give rise to'*. Trust means to have confidence or *'reliance on the integrity, justice etc. of a person'*. Confidence means *'belief in the trustworthiness or reliability of a person or thing'*.<sup>5</sup>
104. The Duck Pond Facebook group has over 800 members. The posts made were visible to the public beyond the page's membership and remained visible at the time of preparing the Final Report. It is evident from the comments made in response to Cr Ferrao's comment (Attachment 2) that Cr Ferrao's comment did not generate community trust and confidence in the Council or in him as a representative of Council.
105. The finding is that Cr Ferrao breached clause 2.2 of the Code.

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<sup>2</sup> Macquarie Essential Dictionary.

<sup>3</sup> Macquarie Essential Dictionary.

<sup>4</sup> Macquarie Essential Dictionary.

<sup>5</sup> Macquarie Essential Dictionary.

Clause 2.3: Act in a reasonable, just, respectful and non-discriminatory way when dealing with people

106. This obligation is directed at the manner in which councillors deal with people. It does not require council members to change their views or adopt a position with which they do not agree.

107. In the Ombudsman's investigation of Cr Lance Bagster,<sup>6</sup> the Ombudsman stated:

*'542 Clause 2.3 appears directed towards a council member's dealings at large, in the sense that it is not limited to a council member's interactions with members of the public or with other council officers.*

*555. In his response to my investigation Cr Bagster submitted that he 'always [endeavours] to treat people in reasonable, just, respectful and non-discriminatory way' and that 'while [he is] firm and occasionally harsh in [his] tone, [he is] as respectful as is appropriate.'*

*556. I am unable to accept Cr Bagster's characterisation of his conduct. In my view, it is wholly inconsistent with the manner and tone of his correspondence with the relevant parties.*

*557 Cr Bagster has also objected to my considering his communications of this kind on the basis that he has been acting as a 'private citizen defending myself against intervention orders served against me personally.' .... In the circumstances, I am satisfied that Cr Bagster's behaviour in sending the communications identified above was sufficiently connected to his position and responsibilities as an elected member so as to impart an obligation to comply with the Code.*

*558. In the circumstances, I am satisfied that Cr Bagster has contravened clause 2.3 of Part 2 of the Code by failing to act reasonably, justly and respectfully ...'*

108. Whilst decisions of the Ombudsman are not to be considered precedent, the reasoning of the Ombudsman is persuasive. I consider the conduct of Cr Ferrao sufficiently connected to his responsibilities to impart an obligation to comply with the Code.

109. In his submission to Deputy Mayor Scheffler, Cr Ferrao advised that as a result of a complaint he made to Facebook a post was removed. In his submission to the Preliminary Report Cr Ferrao repeated this assertion. His comment to [REDACTED] was not removed from the Duck Pond Facebook page although it is likely Cr Ferrao was of the understanding this had occurred because he asked the Facebook administrator to do so.

110. It is noted that, at the time of preparing this Final Report, Cr Ferrao had not deleted his own post.

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<sup>6</sup> [2018] SAOmbRp 24.

111. On 7 June 2022 Cr Ferrao was also asked to identify the comments made by [REDACTED] that he said were *'offensive and rude and hateful comments about me and to me', 'hateful comments about my political association(s)'* and *'a hurtful and vexatious assault'*.<sup>7</sup> This information has not been provided.
112. Having reviewed [REDACTED] post we have been unable to identify comments that were rude, offensive, hateful, vexatious, or about Cr Ferrao's political associations.
113. On its face, the comment made by [REDACTED] to Cr Ferrao was direct and questioned Cr Ferrao's involvement in the Freshwater Pond issue. It is conceivable that Cr Ferrao found the comment upsetting.
114. On 7 June 2022 Cr Ferrao was asked to provide information on his motivation in making a comment of this nature on the Duck Pond Facebook page directed at [REDACTED]. The Investigator now understands that Cr Ferrao may feel that previous comments made by [REDACTED] and directed towards him explain the motivation.
115. The Investigator has located some previous comments made by [REDACTED] on the Duck Pond Facebook page but has not identified any comments or posts directed towards Cr Ferrao prior to 11/12 April 2022. In any event, if comments had been made by [REDACTED] towards Cr Ferrao on or before 11 April 2022 that were improper, and this investigation makes no conclusion that this is the case, Cr Ferrao could have addressed his concerns through ways that, for reasons provided below, did not run foul of the Code.
116. When considering the tone and content of Cr Ferrao's post, I consider the response to [REDACTED] was not *'made in the most respectful manner considering how she spoke with me at first instance'*.<sup>8</sup>
117. Based on the information before the Investigator, Cr Ferrao's response to [REDACTED] was inappropriate and unprovoked. It was not reasonable, just or respectful in the circumstances. The comments made by [REDACTED] to Cr Ferrao were more vociferous. It is unknown why Cr Ferrao's response to [REDACTED] was more muted and to [REDACTED], on balance, offensive. It has been suggested in the course of the investigation by the Complainants that Cr Ferrao's different approach was gender based. The Investigator considers it unnecessary to decide that matter, having found that the response was in breach of the Code, and draws no conclusion to that effect. The Investigator has, as part of the investigation, verified [REDACTED] assertion that Cr Ferrao is a White Ribbon Ambassador via Cr Ferrao's public LinkedIn page.
118. Cr Ferrao did treat [REDACTED] differently to [REDACTED]. In treating [REDACTED] differently Cr Ferrao acted in a discriminatory way in the sense of a level of unfairness and differential treatment when dealing with [REDACTED].
119. The finding is that Cr Ferrao breached clause 2.3 of the Code.

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<sup>7</sup> Correspondence from Cr Ferrao to Cr Scheffler, 28 April 2022.

<sup>8</sup> Cr Ferrao submission to Deputy Mayor Scheffler, 28 April 2022.

Clause 2.4: Show respect for others if making comments publicly

120. The comment made by Cr Ferrao was on a Facebook page visible to the public. His comment was made publicly.
121. On its face the comment was not respectful and did not show respect to [REDACTED].
122. The finding is that Cr Ferrao breached clause 2.4 of the Code.

Clause 2.5: Ensure that personal comments to the media or other public comments, on Council decisions and other matters, clearly indicate that it is a private view, and not that of the Council

123. In his submission to Deputy Mayor Scheffler Cr Ferrao stated that the comment was made using his private Facebook page and not his elected member Facebook page. While this is correct, the post and comments were made publicly.
124. The initiating post was about a Council decision.
125. On 7 June 2022 Cr Ferrao was asked whether he acknowledged the first post made by him on 11 April 2022 or 12 April 2022 on the Duck Pond Facebook page identified him as an elected member and referenced the actions he took as an elected member (and if not, why not). A response to this request was not provided to the Investigator.
126. To the extent that the post made by Cr Ferrao about Council's decision, and also the comment to [REDACTED] were personal comments Cr Ferrao did not identify his originating post or comment to [REDACTED] as a private view, and not that of Council.
127. The finding is that Cr Ferrao breached clause 2.5 of the Code.

## Further Observations

128. [REDACTED] alleged that Cr Ferrao's conduct breached Part 1 of the Code. Part 1 provides higher principles and an overarching statement. This part does not constitute separate enforceable standards of conduct. The Initial Assessment identified that there would not be an investigation into alleged breaches of Part 1 of the Code.
129. In her initiating complaint, [REDACTED] alleged that Cr Ferrao's conduct breached the Code's Part 3 Misconduct, Clause 3.2 '*Perform and discharge their official functions and duties with reasonable care and diligence at all times*'.
130. Following assessment, any complaint under Part 3 of the Code must be referred to the Ombudsman or Office of Public Integrity as the matter requires.<sup>9</sup> With the information considered for the Initial Assessment of the Complaint, it was determined that a referral to

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<sup>9</sup> In accordance with Council's *Council Members Code of Conduct Policy*.

the Ombudsman or Office of Public Integrity for an alleged breach of Part 3 of the Code was not required at that time.

131. In the course of this investigation, the Investigator was provided with a copy of the 2021 Final Investigation Report into the conduct of Cr Ferrao. This investigation concerned Cr Ferrao's conduct in photographing people in the public gallery without their consent, whilst deputations were being made about the half court basketball court proposal.
132. That investigation found Cr Ferrao breached clause 2.3 of the Code as a result of his actions directed at residents, and that his actions were not reasonable or respectful.
133. The Investigator placed no weight on the detail of that report whilst undertaking this investigation but has determined that the findings should be noted for the purpose of this Final Report and its recommendations.
134. Clause 2.23 of the Code states:

*'Repeated or sustained breaches of this Part by the same Council member may be referred, by resolution of the Council, to the relevant authority as a breach of Part 3.'*

135. As the findings in the Final Report conclude that Cr Ferrao has breached Part 2 of the Code, and Cr Ferrao has done so previously, a complaint could be referred to the relevant authority as a breach of Part 3 of the Code. That would be a matter for Council to decide.
136. In the course of this investigation, the Investigator was also provided with Council's Recognition of Service Policy Council Members, Freeman, Freedom and Keys to the City (revoked), and the Civic Recognition and Events Policy (effective June 2019). Both policies state '[r]ecognition of Honorary Freeman of the City is not to be given lightly and a high standard for the award must be maintained at all times'.
137. Cr Ferrao lists Freeman of the City of Charles Sturt on his LinkedIn page as an honour given to him in January 2018, with the descriptor '*Honorary Freedom of the City is an honour bestowed upon an individual who has served the City, its community and beyond with outstanding and dedicated service over many years and beyond the normal call of duty.*' This wording has been derived from Council's policies, other than Cr Ferrao's omission of the word '*often*' before '*beyond the normal call of duty*'.
138. In accordance with Council's policy, Cr Ferrao's Freemanship is suspended whilst Cr Ferrao is an elected member of Council.

## Recommendations

It is a matter for Council to consider what action, if any, it wishes to take in response to this Final Report. My recommendation is that the following occur:



- Council require Cr Ferrao to issue a public apology for his conduct and an apology to [REDACTED].
- Council require Cr Ferrao to attend training on appropriate and respectful communication.
- Council consider whether, by resolution of Council, Cr Ferrao's conduct should be referred to the relevant authority under Part 2, clause 2.23 of the Code.

---

Sue Porter  
Associate  
**EMA Legal**

## Attachment 1



Gerard Ferrao

I voted tonight at the City of Charles Sturt council chambers to save the duck pond!

As local councillor I am delighted to be able to preserve this great amenity for residents and future generations at west lakes.

Saving the ponds was a grand victory for the residents tonight at Council Chambers. It was impressive that the decision to end options 3 and 4 forever was agreed by the Full Council.

I carefully sought out the wording to make sure that something so beautiful is worth keeping, worth protecting and worth preserving. ...

I loved the speeches of [REDACTED] and [REDACTED]; and I would hope that their presentations they would be posted here for you all to read again.

Only when the community works together can a true difference really be made.

Good work everyone... you should be so very proud of your efforts.

Take care and stay safe.

Gerard Ferrao

Like Reply Share 6 w




**Gerard Ferrao** BS / you only voted against it after the local WLakes communities unexpected backlash - where were you in person during this long community protest? Now trying to hijack [REDACTED] FB site via her success notice post to access her FB 'friends' list, to self promote yourself and defacto take credit away from her and the tireless protest team, is deplorable. Grrrr! 😡 ...

(😬 Oh I just remembered; there's a Council election coming up!!) 🗳

Like Reply Share 6 w Edited



 Gerard Ferrao  
You don't know anything about me [REDACTED] or what I have done to advance this issue inside the process.


I find your comment to compare this Council's conduct tonight to a group of terrorists to be an insensitive statement.

I took this matter  
To council & council agreed with me to save the ponds.


That's A fact.  
So when it mattered most I took the measured and considered action necessary.

Gerard Ferrao

Like Reply Share 6 w

 [REDACTED]  
Gerard Ferrao B/S Mr Ferraro - Opportunistic manipulative, self serving wannabe politicians on councils are easily identified and transparent. The credit for the Council's withdrawal lies with [REDACTED] and the protest team, local MP Stephen Mulligan and not you! Extremely poor form trying to usurp the team's tireless dedicated efforts and take the credit for the reversal decision yourself- 😞

Like Reply Share 6 w Edited

 2

Like Reply Share 6 w Edited

**Gerard Ferrao** Please don't take credit because you voted for an agenda item that should never have appeared in the agenda.

Why didn't you vote or try to stop it going to consultation in the first place?

Where have you been the last 4 years to be vocal about the pond and demand to know why the pond is in such a state and hasn't been maintained?

Asked the questions about why the rotunda hasn't been repaired?

The credit lies solely with [REDACTED] and the volunteers that spent countless hours of their own time, spent their money on posters, flyers etc..... to make the community aware of what was happening. If it wasn't for these people, we wouldn't know!!!!

Yes [REDACTED] were excellent and raised excellent points that should have been considered by council.

It should not be up to the rate payers to raise the points they did tonight, this is councils bread and butter!!!!

So don't take credit because you stood tonight and voted for an issue that should have never been on the agenda!!!!

Self praise is no recommendation!!!

Like Reply Share 6 w Edited 5

**[REDACTED]** [REDACTED] - absolutely correct. Self serving political wannabe's on councils are tiresome, distracting, divisive and non productive. There should be no place for party-politics in local councils in SA.

Like Reply Share 6 w Edited 3

**Gerard Ferrao** [REDACTED] you seem to have a lot of hate inside you....

Have you thought of seeking a medical opinion and/or taking anger management classes...

**Gerard Ferrao**

Like Reply Share 6 w



Gerard Ferrao that is a very inappropriate comment from a councillor. \*\*\*

Like Reply Share 6 w 4

Gerard Ferrao - this is disgraceful behaviour from a sitting councillor to a local resident and my view is that [REDACTED] (whom I have never met) should report you to the CS Council CEO, The CS Mayor, the LGA, the SA Office for Women & The Office of Local Government - Attorney Generals Department and... you be immediately suspended from the CS council whilst an investigation is conducted regarding your comments to [REDACTED]. She should at the very least be entitled to a full public apology from you for your disrespectful public comments and you should be disciplined and or removed. \*\*


Like Reply Share 6 w Edited 3

Gerard Ferrao rude much? There is no need to be so rude, these two rate players were only pointing out that you alone did not save the duck pond [REDACTED] and her team were the ones that saved it along with people who protested. You are so self involved you don't even mention your co counsellor, who at least had the guts to show up at the meeting. Remember there is no I in team! The whole chamber voted for the change. In you speech tonight all I heard was I I I, to be honest I didn't even know who you were because in the last 4 years I've not even heard or seen you.... must be an election on the horizon 🤔 Mental health is no laughing matter and to say those things shows more about your character and humility, or lack there of, and in my opinion you should apologise. You have no idea what a person is going through and saying things like that is not only wrong, but down right rude and I for one would expect more from someone who is supposed to be representing me as a paying rate resident. I will say this, thanks for voting and changing what you and your co councillors did, but more importantly to this amazing group of people, who saved what should never have been on the count block! \*\*

Like Reply Share 6 w Edited 3

LOVE Reply Share 6 w Edited

... absolutely. This is a sexist, bully attack on a woman for simply expressing her community caring views. Coupled with a complete lack of understanding of mental health issues, this is disgusting comment and should be reported for further action to <https://officeforwomen.sa.gov.au/> ...

 OFFICEFORWOMEN.SA.GOV.AU  
Office for Women - Home

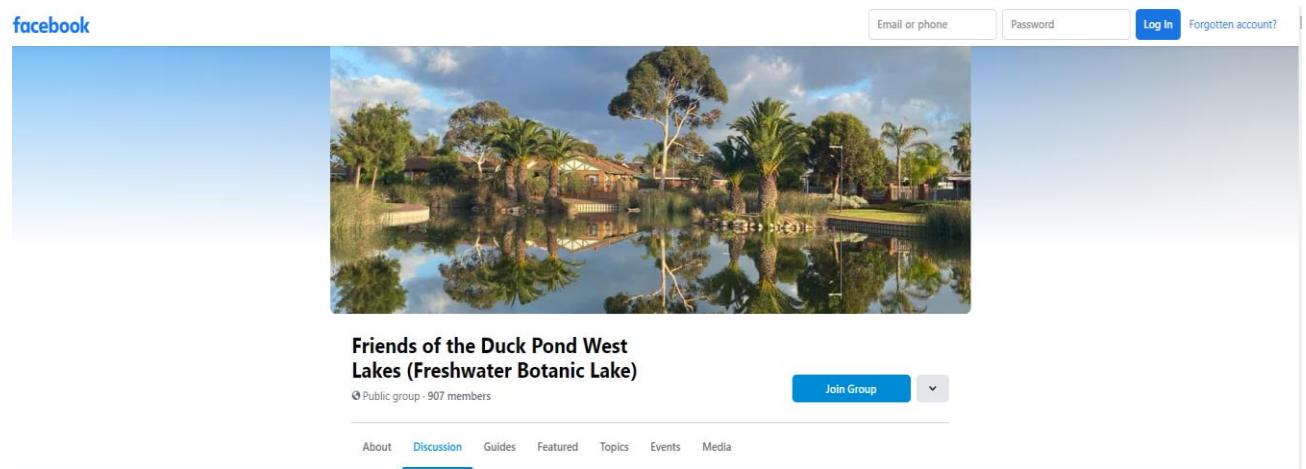
Like Reply Share 6 w Edited 3

Write a public reply...

Gerard Ferrao - please stop this grandstanding, self serving false accolades and personal attacks. This FB protest site is not about you, it is agin you as a member of the CS council that has created the need for its existence in the first place. It is obvious that you are simply trying to hijack the protest groups FB site now and access it's followers for your own self promotion (probably for the upcoming council elections!). It is disrespectful to ... and all the members and supporters of her hard working protest group. ...

Like Reply Share 6 w Edited 4

## Attachment 2: Facebook posts – accessed 25 July 2022



### About

The Freshwater Botanic Lake (affectionately called the Duck Pond) is under threat of removal. This beautiful wetlands area in West Lakes must be protected. Join in and share your photos, videos, stories and love of this sanctuary. Or join to see what others share while places like this in urban areas still remain. #savetheponds See less



#### Public

Anyone can see who's in the group and what they post.



#### Visible

Anyone can find this group.



#### West Lakes



#### General



11 April · 🌐

It's my absolute pleasure to announce that we have SAVED THE PONDS! Council voted unanimously to remove options 3 & 4 from the Review. The Review will now proceed only with Options 1 & 2 (maintain and/or improve the ponds). Thanks Gerard Ferrao and Stuart Ghent for working with Council on tightening the words and ensuring that the Freshwater Lake will be preserved. Thanks to [Stephen Mullighan MP](#) and your team for raising awareness and supporting us and the protests. Thanks also to the massive efforts of the Friends Committee: [REDACTED] Big thanks to our hard working volunteers and our dedicated community. Together we have saved the ponds!!!! 🙌🌱🐢🍷



👍❤️ 231

123 comments 17 shares

👍 Like

💬 Comment

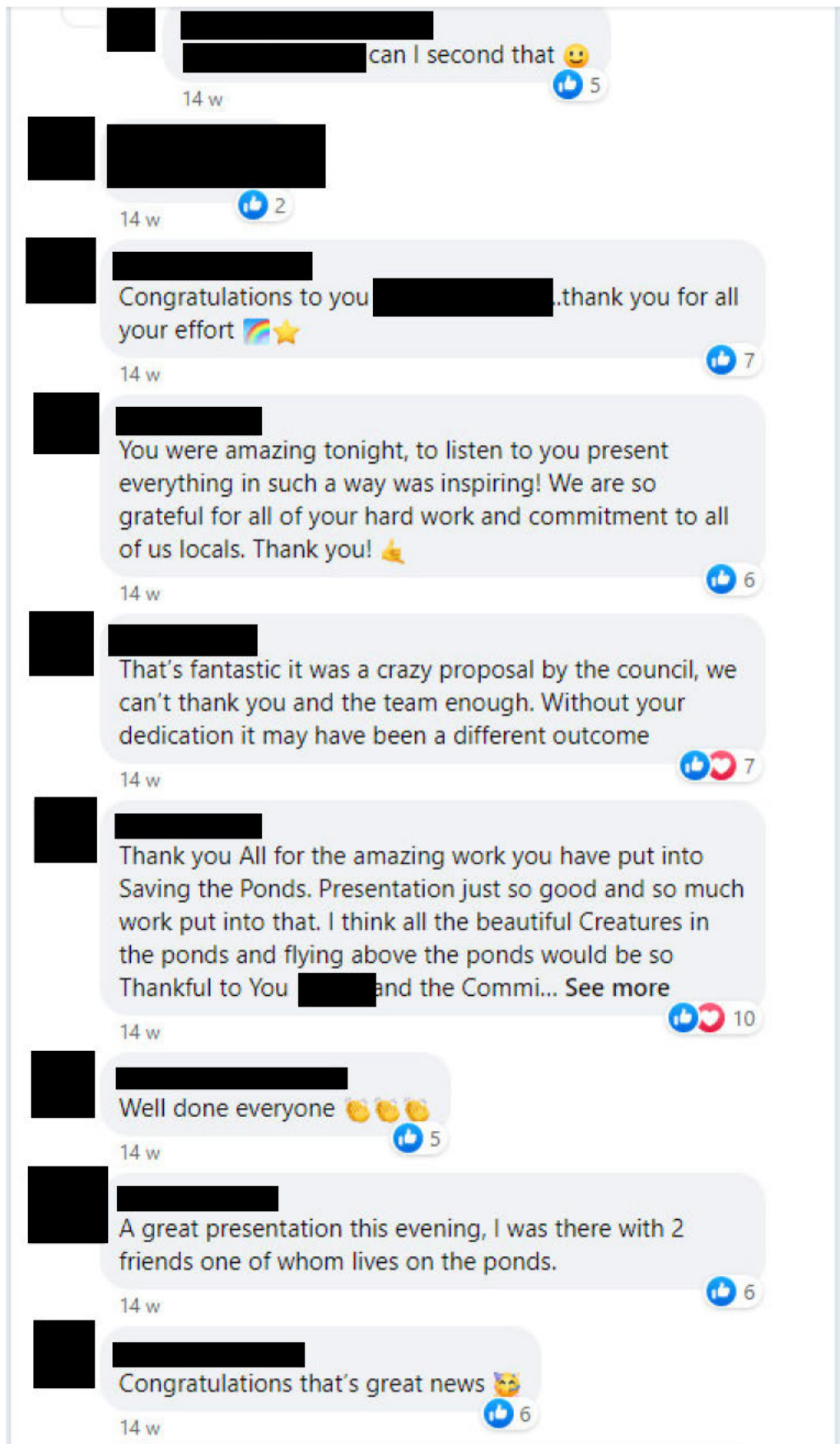
➦ Share

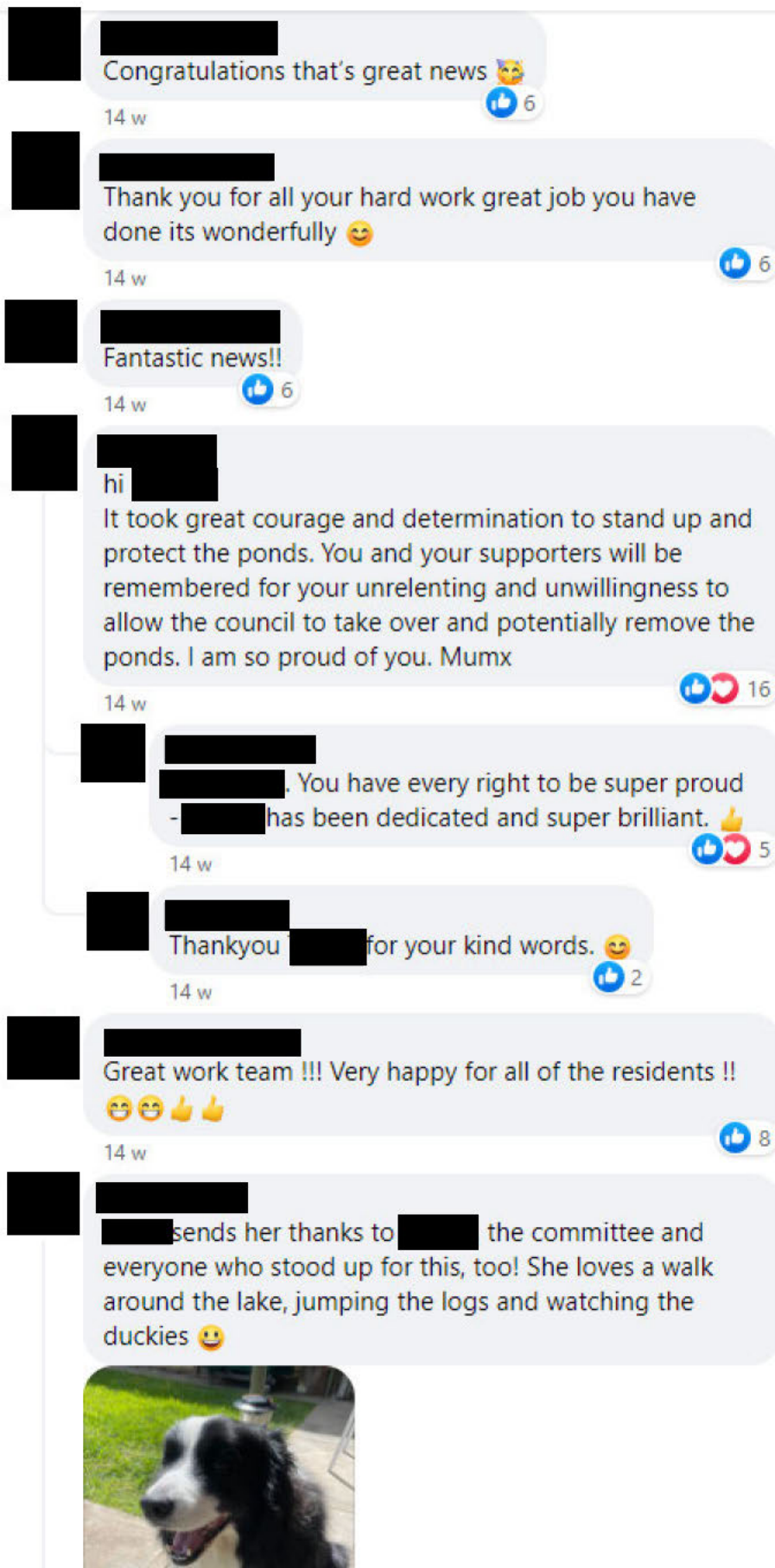
- Great news!  
14 w 6
- Yay! Well done to you all 😊 that's great news! You really rallied the troops all of your tireless efforts paid off.  
14 w 8
- That is fantastic! It's how it should be in the first place ❤️  
14 w 5
- Thank you to all involved in saving the duck pond!  
14 w 7
- Congratulations and all your team 🌹🌹  
14 w 7
- Well done everyone, great result 🏆🏆  
14 w 5
- Brilliant 🏆🏆🏆 great work and team and Gerard!! 🎉🎉🎉  
14 w 7
- The depositions presented tonight were fantastic. You should be very proud of yourselves and your committee. Congratulations for all your hard work! Made me teary when the council announced it's decision. Well done! 🏆  
14 w 13
- Also an amazing effort by you 😊  
14 w 8
- Her presentation was awesome!  
14 w 4



- ██████████  
██████████  
Absolutely fantastic work from day one. I don't know how you did it, your presentation was fabulous. Thank you for everything you and your great team have achieved  
14 w 7
- ██████████  
██████████  
Omg you got a result already? I was at the meeting tonight with my Mum and we loved how you and ██████████ spoke. Thank you ██████████ and everyone else involved in saving our beautiful pond! My 6yo will be over the moon when I tell him tomorrow 🥳  
14 w Edited 9
- ██████████  
██████████  
Such good news!!! Well don't everyone. We did it 🥳🥳🥳  
14 w 5
- ██████████  
██████████  
Amazing news. You guys are great. It was a crazy proposal  
14 w 7
- ██████████  
██████████  
14 w 1
- ██████████  
██████████  
woohoo...we did it! Turtle power x  
14 w 3
- ██████████  
██████████  
Great news! Thank you ██████████ and the rest of the team! 🥳🥳🥳❤️❤️❤️🎉🎉🎉🥳🥳🥳  
14 w 8
- ██████████  
██████████ Author  
██████████ thank you !!!!! You played a very important part in this and spread the message far & wide 😊😊😊  
14 w 5
- ██████████  
██████████  
we are very grateful 🙏  
14 w 8



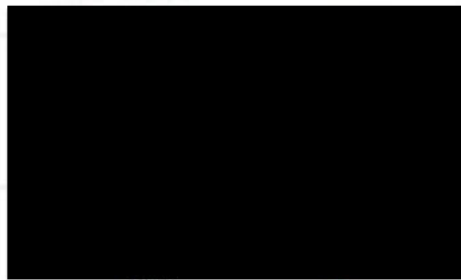




██████████ she's an anxious girl and its been difficult to find pleasant places to walk where there is lots to sniff, and (almost) no off lead dogs. Here and a few other places are her only short walks a week.



14 w Edited



14 w



Gerard Ferrao

Stella looks beautiful  
Gerard Ferrao



14 w

██████████ So pleased to hear  
Thank you to all who worked so hard to save our ponds

14 w












██████████ Beat news I've heard all day! 🎉👍👍👍👍👍

14 w





- [REDACTED] and your wonderful team are amazing. Thankyou so much for all you have done for us. Fabulous presentation tonight from both of you. I was there tonight with my daughter. We both love it here and the Community strength it has taken to save this p... See more
- 14 w   7
- [REDACTED] Great work to [REDACTED] and all the volunteers and those that turned up to the rallys ... great work ....
- let's keep an eye on council though, if they can (almost) make that ridiculous decision ... what else are they doing!!!
- Keep them honest!!!
- 14 w  10
- [REDACTED] [REDACTED] were amazing tonight, so lucky to have had both representing us 🙌
- 14 w    8
- [REDACTED] [REDACTED] they sure were. I think they should both consider standing for council!
- 14 w  3
- [REDACTED] I agree !
- 14 w  4
- [REDACTED] [REDACTED] and might I mention to [REDACTED] [REDACTED] for all his assistance 😊
- 14 w  3
- [REDACTED] [REDACTED] absolutely.... my apologies for missing him. I didn't have the pleasure of meeting [REDACTED]
- 14 w Edited 

██████████  
██████████  
Congrats!!! Glad Ponds still staying!

14 w



██████████  
That is so good, well done everyone 🥳

14 w



██████████  
Hubby was there tonight as a supporter and very happy and relieved with the result to save our duck ponds .We've been taking all our children along there since 1982 and now still enjoying the peace and serenity and all the wildlife with our grand ch... See more

14 w



██████████  
Great work - congratulations on your campaign to save the ponds, so happy it was successful!

14 w



██████████  
Fantastic news to read 🥳🥳🥳 well done and congratulations to all who fought and helped to save 🥳🥳🥳🥳🥳🥳

14 w



██████████  
How wonderful. Thanks to ██████████ & everyone who supported this wonderful cause. So happy. Congratulations 😊😊😊

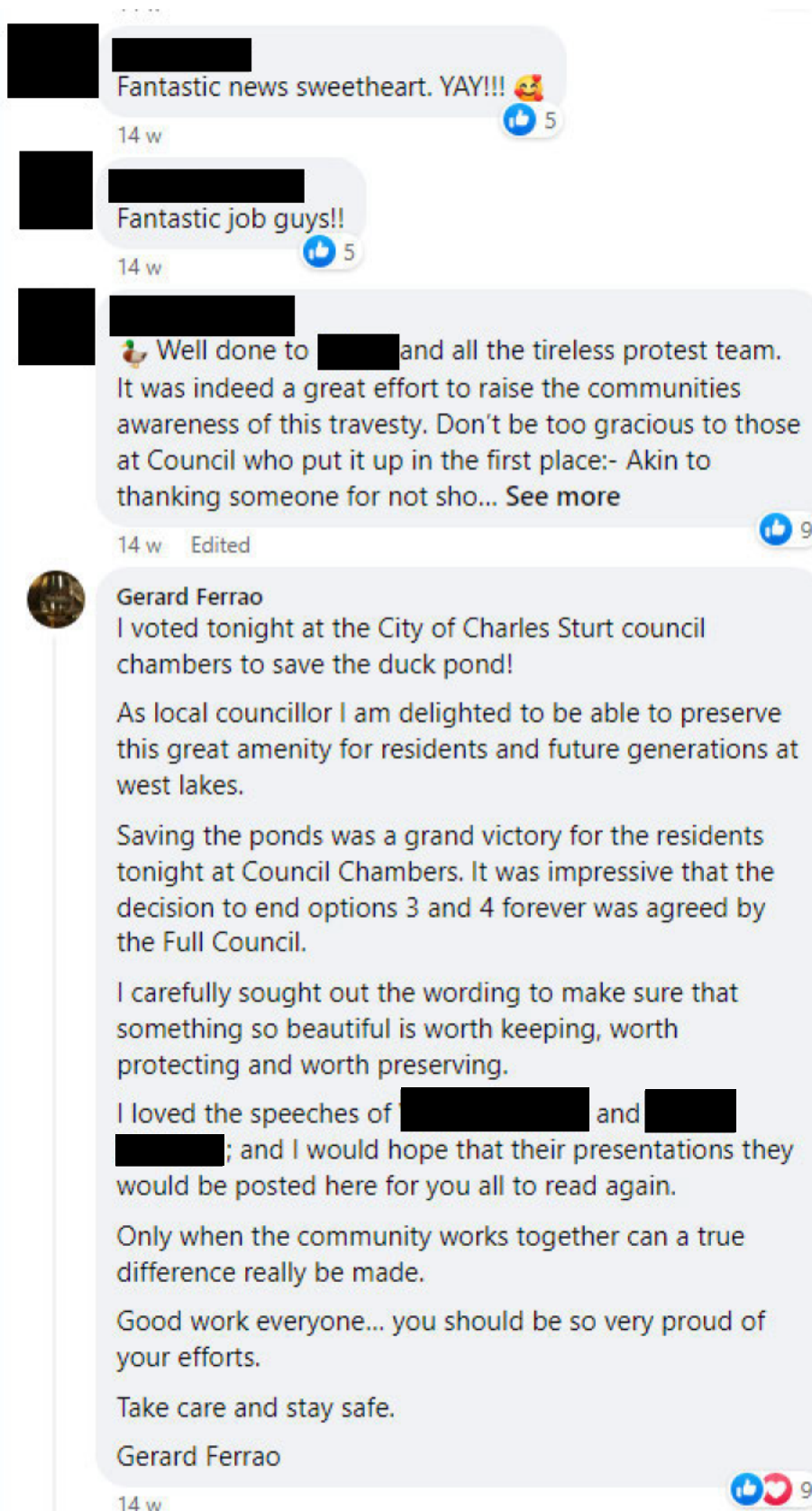
14 w



██████████  
Thank you for the great job you've been doing ██████████ and in particular yours and ██████████ presentations to the Council tonight. A lot of work has gone in to get us this far and to achieve this great result, so thank you to all involved 🙏

14 w







14 w

Gerard Ferrao BS / you only voted against it after the local WLakes communities unexpected backlash - where were you in person during this long community protest? Now trying to hijack [REDACTED] FB site via her success notice post to access her FB 'friends' list, to self promote yourself and defacto take credit away from her and the tireless protest team, is deplorable. Grrrr! 😡 (😬 Oh I just remembered; there's a Council election coming up!!) 🗳️

14 w Edited 3

Gerard Ferrao  
You don't know anything about me [REDACTED] or what I have done to advance this issue inside the process.

I find your comment to compare this Councils conduct Tonight to a group of terrorists to be an insensitive statement.

I took this matter  
To council & council agreed with me to save the ponds.

That's A fact.  
So when it mattered most I took the measured and considered action necessary.

Gerard Ferrao

14 w

Gerard Ferrao B/S Mr Ferraro - Opportunistic manipulative, self serving wannabe politicians on councils are easily identified and transparent. The credit for the Council's withdrawal lies with [REDACTED] and the protest team, local MP Stephen Mulligan and not you! Extremely poor form trying to usurp the teams's tireless dedicated efforts and take the credit for the reversal decision yourself- 😡

Gerard Ferrao Please don't take credit because you voted for an agenda item that should never have appeared in the agenda.

Why didn't you vote or try to stop it going to consultation in the first place?

Where have you been the last 4 years to be vocal about the pond and demand to know why the pond is in such a state and hasn't been maintained?

Asked the questions about why the rotunda hasn't been repaired?

The credit lies solely with [REDACTED] and the volunteers that spent countless hours of their own time, spent their money on posters, flyers etc..... to make the community aware of what was happening. If it wasn't for these people, we wouldn't know!!!!

Yes [REDACTED] were excellent and raised excellent points that should have been considered by council.

It should not be up to the rate payers to raise the points they did tonight, this is councils bread and butter!!!!

So don't take credit because you stood tonight and voted for an issue that should have never been on the agenda!!!!

Self praise is no recommendation!!!

14 w Edited



absolutely correct. Self serving political wannabe's on councils are tiresome, distracting, divisive and non productive. There should be no place for party-politics in local councils in SA.

14 w Edited



Gerard Ferrao

you seem to have a lot of hate inside you....

Have you thought of seeking a medical opinion and/or taking anger management classes...

Gerard Ferrao

14 w



Gerard Ferrao that is a very inappropriate comment from a councillor.

14 w



Gerard Ferrao - this is disgraceful behaviour from a sitting councillor to a local resident and my view is that (whom I have never met) should report you to the CS Council CEO, The CS Mayor, the LGA, the SA Office for Women & The Office of Local Government - Attorney Generals Department and... you be immediately suspended from the CS council whilst an investigation is conducted regarding your comments to She should at the very least be entitled to a full public apology from you for your disrespectful public comments and you should be disciplined and or removed.

14 w Edited





Gerard Ferrao rude much? There is no need to be so rude, these two rate players were only pointing out that you alone did not save the duck pond [REDACTED] and her team were the ones that saved it along with people who protested. You are so self involved you don't even mention your co counsellor, who at least had the guts to show up at the meeting. Remember there is no I in team! The whole chamber voted for the change. In you speech tonight all I heard was I I I, to be honest I didn't even know who you were because in the last 4 years I've not even heard or seen you.... must be an election on the horizon 🤔

Mental health is no laughing matter and to say those things shows more about your character and humility, or lack there of, and in my opinion you should apologise.

You have no idea what a person is going through and saying things like that is not only wrong, but down right rude and I for one would expect more from someone who is supposed to be representing me as a paying rate resident.

I will say this, thanks for voting and changing what you and your co councillors did, but more importantly to this amazing group of people, who saved what should never have been on the count block!

14 w Edited





absolutely. This is a sexist, bully attack on a woman for simply expressing her community caring views. Coupled with a complete lack of understanding of mental health issues, this is disgusting comment and should be reported for further action to <https://officeforwomen.sa.gov.au/>



OFFICEFORWOMEN.SA.GOV.AU  
Office for Women - Home

14 w Edited



Gerard Ferrao - please stop this grandstanding, self serving false accolades and personal attacks. This FB protest site is not about you, it is agin you as a member of the CS council that has created the need for its existence in the first place. It is obvious that you are simply trying to hijack the protest groups FB site now and access it's followers for your own self promotion (probably for the upcoming council elections!). It is disrespectful to [REDACTED] and all the members and supporters of her hard working protest group.

14 w Edited



A massive thank you to [REDACTED] and team for their hard work and all the community involved!. WE SAVED OUR DUCK PONDS!!! Hopefully for generations to come! 🙌



14 w



-    
Fantastic thank you for all the hard work everyone involveD  
  
14 w  4
-    
Fantastic news, well done  and all the team involved. A win for the community and the wildlife   
14 w  8
-    
Wonderful news. Thank you to all the people involved in saving our duck pond.  
14 w  6
-    
Congratulations to all concerned, great job!  
14 w  5
-    
That's really great news guys, well done on all of your hard work.  
14 w  4
-    
What a fantastic outcome! Congratulations  for all of your hard work and to everyone else involved. We need to make sure these beautiful spaces are preserved for wildlife and public enjoyment .  
14 w   7
-    
Great News! Well done to all & a fantastic outcome for our ecosystem & community   
14 w  4
-    
Wonderful news. Congratulations everyone on a great effort ending in success. 😊  
14 w  5

14 w

So good, well done!! 😊

14 w

Awesome job

14 w

Great effort everyone, fantastic outcome. 🎉

14 w

Well done

14 w

Awesome work. Congratulations!

14 w

Author

thanks for all of your advice early in the piece! It was so valuable and I really appreciate you giving me your time and support 🙏🐢🐢

14 w

4 replies

Well done on a great campaign getting the community to have their voices heard

14 w

Well done, and all the supporters, this incredible public park, and ponds must always remain in the possession of the public, let's hope the option of removal, closure etc of the ponds is never again raised by the council.

14 w

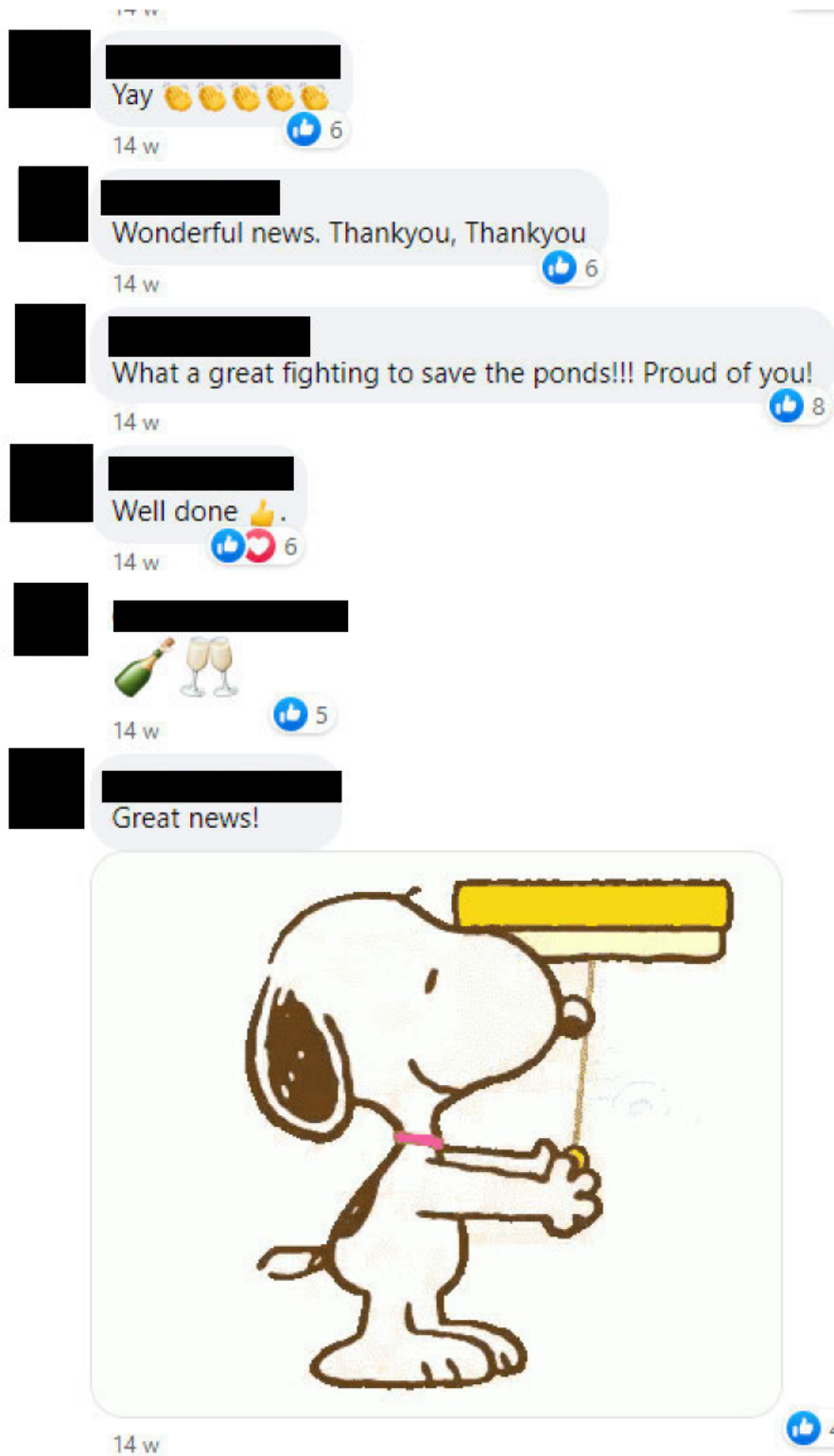
totally agree - full marks to all involved in the protest group. 👍

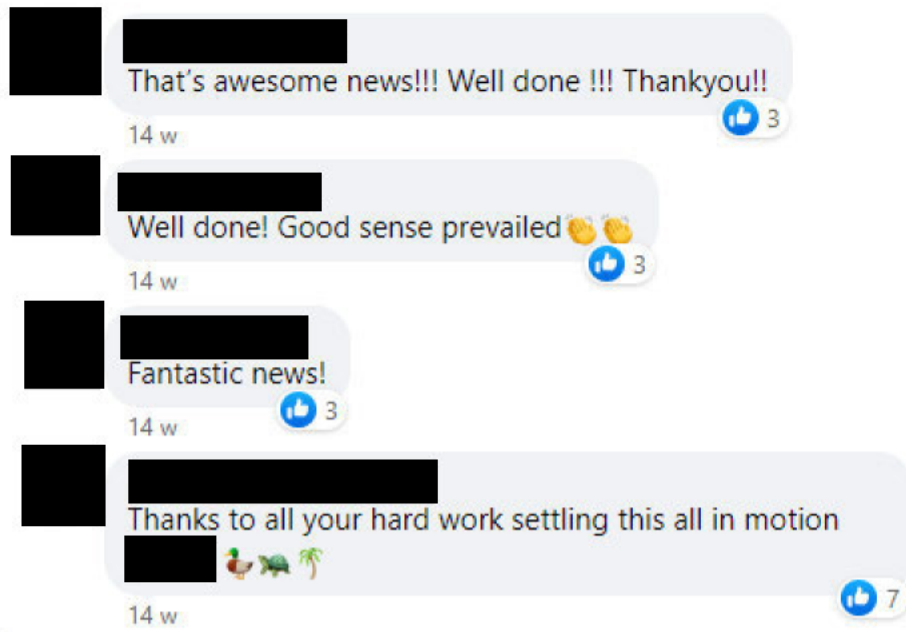
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**6.78 RESPONSE TO MOTION ON NOTICE - COUNCIL'S APPROACH TO PRODUCTS MANUFACTURED BY MULTINATIONAL COMPANIES THAT CONTINUE TO OPERATE IN RUSSIA**

**TO** Council

**FROM:** Manager Strategic Procurement Services - Jamie Dunnicliff

**DATE:** 22 August 2022

**Brief**

A report further to a Motion on Notice to Council on Monday, 11 April 2022 (refer CL22-04-11, Item 7.03) received from Councillor Sarah McGrath requesting that Council does not support purchase of products or have suppliers supply products that are manufactured by multinational companies that continue to operate in Russia, and that staff investigate and provide a report on what products are currently being supplied to Council either directly or indirectly, by companies listed in the Yale University report, dated 4 April 2022 (under the heading of 'digging in' or 'buying time').

**Recommendation**

**Council notes the report and review conducted of all suppliers utilised by Council, referenced in line with the Yale University School of Management Report which identified indirect expenditure with one supplier. Further, Council notes employees have already substituted alternate products at no additional costs to Council or ratepayers.**

**Status**

This report relates to or impacts upon the following Community Plan Objectives 2020-2027.

**Our Leadership - A leading & progressive Local Government organisation**

The management of our city is progressive, responsive and sustainable to ensure a united and unique place for future generations.

Open and accountable governance.

**Relevant Council policies are:**

- Procurement Policy

**Relevant statutory provisions are:**

- Local Government Act 1999

### Background

In a response to the Notice of Motion (endorsed by Council on 11 April 2022) below, a review of Council expenditure with suppliers operating in Russia has been conducted, with the findings to follow.

### Motion

1. That Council does not support the purchase of products or have suppliers supply products that are manufactured by multinational companies that continue to operate in Russia, (as per the link below, that Yale University has updated as of the 4th April 2022 and listed as "digging in" or "buying time").  
<https://som.yale.edu/story/2022/over-500-companies-have-withdrawn-russia-some-remain>
2. That staff investigate and provide a report to Council on what products are currently being supplied to Council either directly or indirectly, by companies listed in the Yale University report, dated 4 April 2022, (under the heading of "digging in" or "buying time") with the view to having them replaced by Australian made goods (where possible) or goods manufactured by companies that do not operate in Russia. That the report also identifies what costs (if any) may be attached to substituting products that are made by Australian companies, or companies that do not operate in Russia.

## Report

Since the invasion of Ukraine began, Yale University School of Management have been tracking the responses of well over 1,200 companies and counting. Over 1,000 companies have publicly announced they are voluntarily curtailing operations in Russia to some degree beyond the bare minimum legally required by international sanctions — but some companies have continued to operate in Russia undeterred.

Originally a simple "withdraw" vs. "remain" list, the list of companies now consists of five categories—graded on a school-style letter grade scale of A-F for the completeness of withdrawal, as per below:

### **Grade: F - Digging In**

Defying Demands for Exit or Reduction of Activities (242 Companies worldwide)

Companies that are just continuing business-as-usual in Russia.

### **Grade: D – Buying Time**

Holding Off New Investments/Development (160 Companies worldwide)

Companies postponing future planned investment/development/marketing while continuing substantive business.

### **Grade: C - Scaling Back**

Reducing Current Operations (171 Companies worldwide)

Companies that are scaling back some significant business operations but continuing some others.

### **Grade: B - Suspension**

Keeping Options Open for Return (501 Companies worldwide)

Companies temporarily curtailing most or nearly all operations while keeping return options open.

### **Grade: A - Withdrawal**

Clean Break - Surgical Removal, Resection (311 Companies worldwide)

Companies totally halting Russian engagements or completely exiting Russia.

## Review of Suppliers

A review of all suppliers utilised by Council in the 2020/21 and 2021/22 financial years has been undertaken, to determine if any suppliers are graded as 'F' or 'D' in the Yale School of Management report. In this period, 1,318 suppliers have been utilised in total.

No direct expenditure was found to be with any of the suppliers listed in Grades 'F' or 'D'. There was indirect expenditure found through our cleaning supplier contract. The supplier in question was Kimberly-Clark, who are rated as follows, under Grade 'D':

**Kimberly-Clark** – (actions taken): suspend new investments in Russia.

Council has indirect expenditure with Kimberly Clark, with the toilet roll and some paper towel dispensing units manufactured by Kimberly Clark.

These products have been requested to be exchanged for a substitute product (Australian manufactured as a priority). This is not a product that is purchased often (as they have a

long lifecycle), however any new bathroom facilities requiring these dispensers will be installed with substitute products. This has been communicated to our internal teams, who manage these projects/upgrades.

It is not envisaged that any additional costs will be incurred for this product.

#### **Financial and Resource Implications**

It is not envisaged that any additional costs will be incurred for the substitution of toilet roll and some paper towel dispensing units manufactured by Kimberly Clark.

#### **Customer Service and Community Implications**

There are no customer service or community implications.

#### **Environmental Implications**

There are no environmental implications.

#### **Community Engagement/Consultation (including with community, Council members and staff)**

There is no requirement for community engagement or consultation.

#### **Risk Management/Legislative Implications**

There are no risk management or legislative implications.

#### **Conclusion**

A review of all suppliers utilised by Council in the 2020/21 and 2021/22 financial years has been undertaken, to determine if any suppliers are graded as 'F' or 'D' in the Yale School of Management report. In this period, 1,318 suppliers have been utilised in total.

**7. MOTIONS ON NOTICE**

Nil

**8. QUESTIONS ON NOTICE**

Nil

**9. MOTIONS WITHOUT NOTICE**

[As previously identified and agreed by the Presiding Member]

**10. QUESTIONS WITHOUT NOTICE****11. BUSINESS - PART 11 - CONFIDENTIAL ITEMS****11.12 CONFIDENTIAL COVER REPORT - CHIEF EXECUTIVE OFFICER PERFORMANCE REVIEW 2021-2022****Recommendation - Exclusion of the Public**

That

- a. pursuant to Section 90(2) of the Local Government Act 1999 Council hereby orders that the public be excluded from attendance at this meeting with the exception of staff (insert staff) currently in attendance at the meeting in order to consider ITEM 11.12 - CHIEF EXECUTIVE OFFICER PERFORMANCE REVIEW 2021-2022 in confidence.
- b. in accordance with Section 90(3) of the Local Government Act 1999 Council is satisfied that it is necessary that the public be excluded to consider the information contained in report ITEM 11.12 - CHIEF EXECUTIVE OFFICER PERFORMANCE REVIEW 2021-2022 on the following grounds:

**Confidential Legislation**

- a. information the disclosure of which would involve the unreasonable disclosure of information concerning the personal affairs of any person (living or dead).

**Recommended Action**

- c. accordingly, on this basis the principle that meetings of the Council should be conducted in a place open to the public has been outweighed by the need to keep the information or discussion confidential.

**11.12 CHIEF EXECUTIVE OFFICER PERFORMANCE REVIEW 2021-2022****CONFIDENTIAL****Brief**

This report seeks to finalise the Chief Executive Officer (CEO) Performance Review for 2021/2022. Allison Ashby of Ashby Magro (AM) Consulting has provided a report based on feedback from the Council CEO Review Panel and the survey results collated from the Elected Members, a number of Council Officers and relevant external stakeholders against the agreed criteria and performance plan for 2021/2022 together with a CEO Salary Benchmarking Report detailing CEO remuneration across Local Government Councils in South Australia.

**11.13 CONFIDENTIAL COVER REPORT - LEGAL ACTION RELATED TO THIRD PARTY ADVICE IN REGARDS TO LOCAL GOVERNMENT JOINT ELECTRICITY CONTRACT****Recommendation - Exclusion of the Public**

That

- a. pursuant to Section 90(2) of the Local Government Act 1999 Council hereby orders that the public be excluded from attendance at this meeting with the exception of the Chief Executive Officer and staff (insert staff) currently in attendance at the meeting in order to consider ITEM 11.13 - LEGAL ACTION RELATED TO THIRD PARTY ADVICE IN REGARDS TO LOCAL GOVERNMENT JOINT ELECTRICITY CONTRACT in confidence.
- b. in accordance with Section 90(3) of the Local Government Act 1999 Council is satisfied that it is necessary that the public be excluded to consider the information contained in report ITEM 11.13 - LEGAL ACTION RELATED TO THIRD PARTY ADVICE IN REGARDS TO LOCAL GOVERNMENT JOINT ELECTRICITY CONTRACT on the following grounds:

**Confidential Legislation**

- h. legal advice.
- i. information relating to actual litigation, or litigation that the council or council committee believes on reasonable grounds will take place, involving the council or an employee of the council.

**Recommended Action**

- c. accordingly, on this basis the principle that meetings of the Council should be conducted in a place open to the public has been outweighed by the need to keep the information or discussion confidential.



**11.13 LEGAL ACTION RELATED TO THIRD PARTY ADVICE IN REGARDS TO LOCAL GOVERNMENT JOINT ELECTRICITY CONTRACT****CONFIDENTIAL****Brief**

Councils via the LGA SA and the State Government (DIT) for Street Lighting purposes, have jointly procured power. A third party was used to assist in negotiations with the retail market and arising from the performance of this third party a legal dispute has occurred between them and the associated Councils and the State Government.

**12. REPORTS OF COMMITTEES - PART 11 - CONFIDENTIAL ITEMS**

Nil

**13. MEETING CLOSURE**