

Eastern Regional Alliance

The size, structure and growth of the Eastern Region Alliance's economy

A report commissioned by the Eastern Region Alliance

Final Report

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Summary and overview

A number of local governments in Adelaide's East have formed an alliance for the purpose of pursuing common goals. This alliance is called the Eastern Region Alliance (or ERA, for short). The local governments comprising ERA are Burnside, Campbelltown, Norwood Payneham & St Peters, Prospect, Tea Tree Gully, Unley and Walkerville. Effective delivery of economic development policy by a local government is helped by such alliances with other local governments so as to provide the scope and leverage over outcomes that potentially-larger allies – State and Commonwealth governments, large firms and the community sector – seek.

At the 2011 Census, ERA's resident population was 284,503 – just under 18 per cent of the State's population of 1.597 million, and nearly a quarter of Greater Metropolitan Adelaide's 1.225 million. Average age was 40 years (close to the South Australian and Greater Metropolitan Adelaide average of 39 years, and ranging from 36 years in Prospect to 44 years in Burnside and Walkerville). Average weekly personal income was \$623 (17 per cent above the South Australian average of \$534 and 12 per cent above the Greater Metropolitan Adelaide average of \$554, but ranging from \$517 in Campbelltown to \$723 in Unley, revealing a degree of personal earning diversity across ERA's population).

The economic contribution of the residents of ERA (ERA's Gross Resident Product or GResP, for short) in 2011 is estimated to be \$17.3 billion (19.0 per cent of the State's GSP) – slightly larger than its population share. The value of goods and services produced within ERA's boundaries – ERA's Gross Regional Product (GRP) – is estimated to be \$10.1 billion in 2011. This represents 11.1 per cent of South Australia's Gross State Product (GSP).

In job terms, employment within ERA's boundaries is estimated to have reached 89,521 persons at the Census of 2011 – 10.9 per cent of South Australia's employment (compared with the City of Adelaide's employment at that time of 109,403 persons – 13.3 per cent of the State's employment). Employment of ERA's residents is larger, however: 141,027 persons (17.2 per cent of the State's employment as at the Census of 2011).

These figures together imply that the productivity of people who work in ERA is about average for the State, while the productivity of ERA's working residents is about 10 per cent greater than the average for workers in South Australia.

Over the five-year period 2006-2011, ERA's GRP grew at the rate of 2.0 per cent p.a., while South Australia's GSP grew by 2.6 per cent p.a. (City of Adelaide by 3.0 per cent p.a.).

Similarly, over the same period, ERA's employment grew by 0.6 per cent p.a., while the State's employment grew by 1.5 per cent p.a. (City of Adelaide by 2.1 per cent p.a.).

Over the past five years, the Eastern Region Alliance's economy (whether measured in output or employment terms, or in location or resident terms) has grown more slowly than the State's economy (and much more slowly than the City of Adelaide's economy). An important question dealt with in this report is whether ERA's economic growth can be accelerated

The dominating sectors in ERA's economy are property and business services (17 per cent share, growing rapidly), finance and insurance (14 per cent share, growing

rapidly), health and community services (13 per cent share, growing rapidly), retail trade (9 per cent share, growing slowly), education (8 per cent share, growing rapidly), and construction (7 per cent share, growing rapidly). These sectors together comprise 68 per cent of ERA's economy.

Several of the remaining sectors show promise as potential economic drivers. Accommodation, cafes and restaurants, while small, has grown quite fast over the past five years. This sector caters to tourism and leisure activities that are correlated with increasing affluence and education. ERA is also in a good position to consider a strong economic future that is based in part on its creative industries – its cultural, recreational and leisure assets.

The Herfindahl Index of Diversification for the Eastern Region Alliance's economic structure, measured by the value added created by each industry, is 0.09, which indicates a highly diversified economic structure.

There is also a very strong upward trend in the qualifications of workers who work in ERA (as well as in the qualifications of workers who reside in ERA) over this five-year period. Nearly two-thirds of workers who work in ERA, or who reside in ERA, hold a post-school qualification.

Looking to the future, two economic growth scenarios are canvassed for ERA over the 20 years from 2011 to 2031: a fast growth scenario and a slow growth scenario.

The fast growth scenario is an acceleration of ERA's GRP growth to 4 per cent p.a.. This scenario is intended to model very positive effects of the introduction of the development options outlined in this report in the context of an improvement in South Australia's growth rate, simultaneously, to 3.5 per cent p.a., equal to Australia's expected growth.

The slow growth scenario maintains ERA's GRP growth rate at its present rate of 2 per cent p.a. This scenario is intended to model the effects on ERA's economy of a less successful application of the development options in this report together with an economic slowdown for the State from 2.6 per cent p.a. to 2 per cent p.a.

In the fast growth scenario, employment growth in ERA is expected to be 2.0 per cent p.a., and in South Australia 1.5 per cent p.a.

In the slow growth scenario, employment growth is expected to be 1.0 per cent p.a. in both ERA and the State. Upward pressure on the unemployment rate is likely, as a result.

In both scenarios, the share in ERA's economy of manufacturing and of government administration and defence are expected to fall, while the shares of finance and insurance, property and business services and health and community services are assumed to rise.

In the fast growth scenario, ERA's Gross Regional Product reaches \$22 billion in 2031 (compared with \$10 billion now). ERA's GRP represents 12.2 per cent of South Australia's Gross State Product of \$182 billion in 2031 (compared with 11.1 per cent of SA's GSP of \$91 billion now). Employment in the ERA reaches 132,000 in 2031 (compared with 89,522 now).

In the fast growth scenario, value added grows in all sectors. ERA's six driver sectors property and business services, finance and insurance, health and community services,

retail trade, education and construction increase their share of ERA's economy slightly and generate nearly 70 per cent of ERA's value added in 2031.

Sectors growing especially fast are cultural and recreational services (where many elements of the creative industries are to be found), accommodation, cafes and restaurants (reflecting lifestyle demands, some newly-centred on the river, creeks and parks) and, in the second decade, electricity, gas and water supply (reflecting increased water supply developments).

There is a building boom as the Eastern suburbs undergo an upsurge in population and economic activity, in business offices, in the creative industries, in apartment living, in the "café society", in hospital modernisation, in new water businesses, in new businesses associated with the Torrens, the creeks and parks, and in exciting developments in education.

The sector with the fastest growing numbers of jobs is cultural and recreational services (more than trebling in size and adding about 2,000 jobs from 2011–2031). This sector is associated with the fast-growing creative industries sector.

Marginally-declining job sectors are mining and manufacturing, reflecting the effects of the end of the exploration and mining boom and the refocussing of manufacturing on small, high productivity, quality, innovative activities.

Employed persons with university degree or diploma qualifications are projected to increase from 40 per cent of employed persons in 2011 to more than 45 per cent of employed persons in 2031. These skilled and affluent people will provide the backbone of ERA's economy. They will be young, affluent and cosmopolitan, coming from many countries and backgrounds.

Many will choose to live in ERA itself, because of the small and home business opportunities that are flourishing in ERA, creating a strong demand for outstanding lifestyle opportunities, including access to attractive open spaces for recreation and enjoyment, a safe environment and quality cultural and entertainment experiences.

By the same token, the number of employed persons without any post school qualifications will fall as a share of employment from just over 40 per cent to just under 35 per cent. Work environments will be increasingly redesigned so that computers (and customers) take over at least some functions presently done by persons without post school qualifications.

In the slow growth scenario, ERA's Gross Regional Product will reach \$15 billion in 2031 (compared with \$10 billion now). ERA's GRP is projected to represent 11 per cent of South Australia's Gross State Product in 2031, the same as in 2011. Employment in ERA will reach 109,000 in 2031 (compared with 89,522 now).

In the slow growth scenario, the *structure* of economic development is the same as in the fast growth scenario, but the *rate* of economic progress is less. Manufacturing value added shrinks, marginally. Fast-growing sectors include cultural and recreational services, followed by health and community services and accommodation, cafes and restaurants. But the overall economic growth rate is modest.

Total employment increases from 89,522 persons in 2011 to 109,022 persons in 2031. The growth in jobs is about 18 per cent less than the growth in jobs in the fast growth scenario.

The sector with the most jobs in ERA in 2031 is health and community services (about 20 per cent of all jobs). The increase in the number of jobs in health and community services is only half of the number in the fast growth scenario, however. The other three big employment sectors are property and business services, retail trade and education. The increase in the number of jobs in these sectors is about half or less of the corresponding increases in the fast growth scenario.

The only sector with rapidly growing job numbers is the small cultural and recreational services (creative industries) sector. Employment in mining, manufacturing, transport and storage and government administration and defence each decline marginally. Employment in electricity, gas and water supply falls fractionally up to 2021, but recovers rapidly as ERA's water businesses gather momentum.

Employed persons with university degree or diploma qualifications are again projected to increase from 40 per cent of employed persons in 2011 to more than 45 per cent in 2031. As in the fast growth scenario, these skilled and affluent people will provide the backbone of ERA's economy.

The number of employed persons without any post school qualifications will increase by less than 1,000 over the next twenty years, again falling as a share of employment from just over 40 per cent to just under 35 per cent.

The appropriate overarching economic development strategy for ERA is to induce the South Australian and Commonwealth governments to put strategies in place that support the growth of industries in Australia at large that are important to ERA's economic development (without necessarily favouring ERA with special deals of one sort or another). If the Australian and South Australian policy context is favourable to the growth of these economic activities, it is very likely that ERA will capture a significant share of their growth.

The industries that ERA should target are a mix of quality financial, professional and business services, creative industries like advertising, film, television and radio, quality retail, quality health and education, non-chain cafes and restaurants, high tech niche manufacturing and food production, tourism (local, national and international), and utilities like water and communications.

To make it more likely that ERA will get a significant share of growth in these industries, ERA should offer to be a pilot space for the trial of Commonwealth and State programs aimed at supporting the development of industries that ERA wants to have grow within its boundaries, including, for example, the roll-out of super-fast broadband like the NBN, creative industries initiatives, hospital and health initiatives, education initiatives (like Independent Government schools), water industry competition, aged care initiatives, tourism initiatives, advanced manufacturing (especially in food), and so on. Proposals should be framed as collaborative exercises based on effective partnerships. It is important, of course, that ERA not lose control of such pilot programs to the higher levels of government, but has an effective say in their execution and evaluation.

ERA's Federal Initiatives Group (ERA-FIG) has already moved in this direction, supporting proposals to higher levels of government in three "transformative" areas – *active ageing* (making greater use of skilled retirees; *smart region* (supporting the evolution of creative industries and preventative health activities); and *sustainable water* (supporting biodiversity, energy saving and waste water recycling).

Another initiative that ERA could pioneer is reform of State and Local Government taxes to support local economic development. For example, whatever people might think about local government rates on land, such a tax is a good tax in the sense that taxing land does not distort land use decisions. On the other hand, the State stamp duty on land sales is a bad tax in that it induces people not to sell houses that they would otherwise sell.

ERA's local governments could offer to the South Australian government to increase rates sufficiently to be able to transfer to the South Australian government annually some affordable proportion of the amount expected to be raised from stamp duty on property sales in ERA. A precedent exists in the State Government's reductions in stamp duty on sales of apartments in the City, although this discriminatory tax introduces other distortions. A uniform reduction in stamp duty on property sales would increase construction and property transactions in ERA and lead to an increase in productivity (and lower costs) due to more appropriate uses of property. This would be an appropriate incentive supporting ERA's economic development strategy.

Increases in Council rate revenues beyond projected amounts (because of rising property values due to the reduction in stamp duty) should result in cuts in rates, particularly for residents, so as to make clear the advantage of attracting more businesses locally.

Similarly, parking regulations and charges should reflect opportunity costs and the need to ration parking spaces, and not be used essentially to raise revenue. When the rationing charge for on-street parking gets high enough, the provision of off-street parking becomes economically rational and feasible. The introduction of rationing of on-street parking in ERA's inner-city local government areas is becoming urgent. Commuters into the CBD are adjusting to rising CBD parking charges in part by on-street parking (at low cost) in neighbouring suburbs to the CBD.

What strengthens local economic development in the long run is not tax cuts and similar financial inducements for selected firms, but fundamental changes to the economics of the local area (like abolishing stamp duty on property transactions) that offer permanent increases in demand for the area's products and services and reductions in the costs of doing business to all firms. Initiating NBN arrangements that reduce communication, purchasing and marketing costs (as ERA is doing) and initiatives that improve the area's liveability are more likely to increase local economic development than offering inducements to a few hand-picked firms.

ERA's member local governments should continue to bear down on their costs (for example, by sharing services and equipment, where it is economical to do so). There is no reason why local governments should not buy services from each other, particularly in activities which can be stored and manipulated electronically and transmitted over the internet, such as payroll, accounts and record keeping. By doing so, rates and other charges can be reduced.

Government initiatives helping firms to become established and profitable are also important. There are a number of ways that ERA's Councils are already engaged in doing this – Eastside and other Business Enterprise Centres are providing vital training (particularly for the large number of home-based businesses in ERA) in how to run a business. People are also being assisted by the BECs to use skills learned in declining parts of the manufacturing sector to set up small, specialist manufacturing businesses in ERA.

A valuable extension of the mandate of the BECs operating in ERA would be to provide a building to house them in each Council area that would act as a support space for small businesses, particularly in the creative industries. These buildings should provide entrepreneur/business “encounter” spaces (like an airport lounge, say), particularly for small businesses in ERA, as well as formal offices for temporary use, training spaces, even penthouse apartments for visitors. These buildings are intended as a “home” for the thousands of small and home businesses in ERA, which will provide much of the successful future economy of ERA.

At least as important for ERA’s Councils is removing (or changing) regulations (red tape) that hinder and restrain businesses (especially small businesses) from starting up and expanding. ERA’s Councils’ own zoning regulations sometimes have the effect of preventing modest and warranted changes in land-use – like “pop-up” businesses, or fresh produce markets on spare Council land! ERA’s Councils should push the zoning envelope to permit pilot uses and events that can be used to inform options for larger scale roll-outs of creative industries and businesses and activities that attract people who work in creative industries. Zoning changes should also be used more along transit corridors to enable businesses to relocate into better mixes that cut costs or increase demand.

Some of the most successful businesses in ERA are surrounded by residential housing (often also containing home-based businesses). As small businesses in affluent countries like Australia move increasingly to clean, advanced manufacturing, professional and creative services, special shopping and eating-out experiences, and so on, the need to separate business and residential uses of land becomes less. Indeed, vertical separation is being regarded the South Australian government as a preferred form of separation near transit routes – in TODs, for example. One of the most effective methods for ERA to stimulate business activity is to get out of businesses’ way.

ERA is also perfectly placed to pursue an economic development strategy based on the provision of enjoyable experiences. This is what economic development strategy should be about in wealthy places like Adelaide’s Eastern suburbs. The economic development aim should be to engender a locational sense of liveliness, opportunity and liveability – a place where valued experiences can be enjoyed by employees, residents and tourists alike and enjoying excellent electronic and physical accessibility. Local governments have a role to play to help provide pleasurable mixes of venues, businesses, art, music, entertainment, shops, cafes and streetscapes.

An important initiative in this respect that is discussed in the report is what is labelled the development of “creek tourism”, particularly in relation to the Torrens River and Linear Park. This suggestion is not new. *The 30 Year Plan for Greater Adelaide* in discussing Eastern Adelaide highlighted a proposal to “enhance the network of recreation trails and open space connected to the Hills Face Zone and River Torrens”. There are complex land ownership problems confronting this. A Linear Park Authority was proposed (and agreed to by the relevant Councils) to deal with this, but was ultimately vetoed by a State Government Department. This proposal needs to be pushed again as walking tourism is huge in many parts of the world and a walking trail from the sea to the Barossa mostly along the Torrens would be a major tourist attraction for Adelaide as well as ERA.

Within this broad emphasis on quality of life and value for companies, individuals and industries, four broad development themes have been identified in discussions with Councils’ staff. These should form a focus for ERA’s development initiatives, which

does not mean that other development issues should not be addressed, but primary focus might be given to developing and supporting these:

- small business generally;
- creative industries;
- sport, recreation and tourism; and
- water.

Strategies to give effect to these four development themes are presented in detail in the last section of this report.

Introduction

This report details the size, structure and growth of the Eastern Region Alliance's economy between 2006/7 and 2011/12 (hereafter called 2006 and 2011). It also details the size, structure and growth of the output produced by the *residents* of the Eastern Region Alliance between 2006 and 2011, and examines the geographic origins of people working in the Eastern Regional Alliance in order to explore commuting patterns. Finally, it deals with prospects and strategic options for the future of the ERA economy. It is hoped, in particular, that the report will be relevant to the valuable work being undertaken by ERA's Federal Initiatives Group, whose Smart Region and Sustainable Water projects are closely related.

The report is based on Census data for 2006 and 2011 (as well as State-wide economic data). The Australian Bureau of Statistics changes its industry classification system from time to time. The classification system used in this report is consistent with data from the 2001 and 1996 Censuses. A table of "concordance", showing how data in the new classification system has been translated into the former classification system, is presented in Appendix 4, below.

Size and growth of the Eastern Region Alliance's economy

The Eastern Region Alliance's Gross Regional Product (GRP) is estimated to have increased to \$10.1 billion in 2011. This represents 11.1 per cent of South Australia's Gross State Product (GSP). This is a sizeable part of the State's economy and can be compared with the City of Adelaide's \$15.5 billion (17.0 per cent of the State's GSP). The economic contribution of the residents of ERA is even larger: \$17.3 billion (19.0 per cent of the State's GSP).

In employment terms, ERA's employment is estimated to have reached 89,521 persons at the Census of 2011 – 10.9 per cent of South Australia's employment (compared with the City of Adelaide's employment at that time of 109,403 persons (13.3 per cent of the State's employment). Employment among ERA's residents is greater still: 141,027 persons (17.2 per cent of the State's employment as at the Census of 2011).

Over the five-year period, ERA's GRP grew at the rate of 2.0 per cent p.a. while South Australia's GSP grew by 2.6 per cent p.a. (City by 3.0 per cent p.a.). ERA's Resident GRP grew more slowly, by 1.7 per cent p.a.

Similarly, over the five-year period, ERA's employment grew by 0.6 per cent p.a., while the State's employment grew by 1.5 per cent p.a. (City by 2.1 per cent p.a.). ERA's Resident employment grew more slowly, by 0.5 per cent p.a.

The Eastern Region Alliance's economy (whether measured in output or employment terms, or in location or resident terms) has grown more slowly than the State's economy (and much more slowly than the City's economy) over the past five years, therefore. What changes could be made that might increase ERA's rate of economic growth is the subject of the report that follows the present report.

The estimated size and growth of the Eastern Region Alliance's economy and of the South Australian economy from 2006 to 2011 (shorthand for 2006/7 and 2011/12 fiscal years) are presented in Table 1, below.

Table 1: South Australia's Gross State Product (\$m, real), Eastern Region Alliance's Gross Regional Product (\$m, real), Eastern Region Alliance's Gross Residents' Product (\$m, real), South Australia's Total Employment ('000), Eastern Region Alliance's Total Employment ('000), and Eastern Region Alliance's Residents' Employment ('000). 2006 and 2011.

Year ended June	2006	2011
SA GSP (real \$m, Chain Volume Measures)	80199	91217
Index SA GSP (2006 = 100.0)	100.0	113.7
ERA GRP (real \$m, Chain Volume Measures)	9179	10143
Index ERA GRP (2006 = 100.0)	100.0	110.5
ERA GResP (real \$m, Chain Volume Measures)	15853	17269
Index ERA GResP (2006 = 100.0)	100.0	108.9
SA Employment ('000 persons)	759.7	819.6
Index SA Employment (June 2006 = 100.0)	100.0	107.9
ERA Employment (persons)	86712	89521
Index ERA Employment (June 2006 = 100.0)	100.0	103.2
ERA Residents' Employment (persons)	137873	141027
Index ERA Residents' Employment (June 2006 = 100.0)	100.0	102.3

Sources: See Appendix 1 and text.

Structure of the Eastern Region Alliance's economy

Using Australian Bureau of Statistics' (ABS) data on the Eastern Region Alliance from the Census years of 2006 and 2011 (as well as other ABS data) estimates of three dimensions of the industrial structure of the Eastern Region Alliance's economy (measured by *production in ERA*, on the one hand, and by *production by ERA residents*, on the other, are presented in Tables 2a, 2b, 3a, 3b, 4a, 4b, 5a, 5b, 6 and 7, below:

- the industry structure of *production (value added)*,
- the industry structure of *employment*, and
- the industry structure of *productivity*.

These estimates enable views to be formed of the size, growth, prospects and problems/challenges of the various industrial sectors comprising ERA's economy over this recent five-year period. These views are useful as part of the process of identifying the Eastern Region Alliance's economic strengths and weaknesses and in informing subsequent consideration of economic development options and opportunities for ERA's future.

Production (value added) by industry in the Eastern Regional Alliance and by residents from the Eastern Regional Alliance

Data estimating the value added produced by each industry in the Eastern Regional Alliance from 2006 to 2011 are presented in Tables 2a, 2b, 3a and 3b, below. The estimates result from multiplying Census employment in each industry in ERA (or from multiplying Census employment of ERA residents in each industry) by value added per employee (productivity) figures for each industry (at each date) *in the State as a whole*.

**Table 2a: The Eastern Region Alliance's Industry Structure, 2006 – 2011:
Value Added by Industry (\$m, current prices)**

Industry	Year		
	2006 \$m	2011 \$m	2006-2011 % p.a.
Agriculture, Forestry and Fishing	24	41	11.3
Mining	141	235	10.8
Manufacturing	542	451	-3.6
Electricity, Gas and Water Supply	230	192	-3.5
Construction	450	628	6.9
Wholesale Trade	328	415	4.8
Retail Trade	585	730	4.5
Accommodation, Cafes and Restaurants	218	277	4.9
Transport and Storage	195	204	0.9
Communication Services	307	329	1.4
Finance and Insurance	808	1170	7.7
Property and Business Services	1011	1389	6.6
Government Administration and Defence	284	306	1.5
Education	513	659	5.1
Health and Community Services	776	1064	6.5
Cultural and Recreational Services	67	82	4.1
Personal and Other Services	238	273	2.8
Non-classifiable economic units	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.
Total industry value added	6717	8445	4.7

Sources: See Appendix 1 and text.

**Table 2b: The Eastern Region Alliance's Industry Structure, 2006-2011
Value Added by Industry (per cent of total value added)**

Industry	Year	
	2006 %	2011 %
Agriculture, Forestry and Fishing	0.4	0.5
Mining	2.1	2.8
Manufacturing	8.1	5.3
Electricity, Gas and Water Supply	3.4	2.3
Construction	6.7	7.4
Wholesale Trade	4.9	4.9
Retail Trade	8.7	8.6
Accommodation, Cafes and Restaurants	3.2	3.3
Transport and Storage	2.9	2.4
Communication Services	4.6	3.9
Finance and Insurance	12.0	13.9
Property and Business Services	15.0	16.5
Government Administration and Defence	4.2	3.6
Education	7.6	7.8
Health and Community Services	11.6	12.6
Cultural and Recreational Services	1.0	1.0
Personal and Other Services	3.5	3.2
Non-classifiable economic units	n.a.	n.a.
Not stated	n.a.	n.a.
Total	100.0	100.0

Source: Table 2a, above.

**Table 3a: The Eastern Region Alliance's Residents' Industry Structure, 2006–2011:
Value Added by Industry (\$m, current prices)**

Industry	Year		2006-2011 % p.a.
	2006 \$m	2011 \$m	
Agriculture, Forestry and Fishing	69	109	9.6
Mining	409	513	4.6
Manufacturing	1312	1125	-1.4
Electricity, Gas and Water Supply	409	472	2.9
Construction	846	1064	4.7
Wholesale Trade	609	781	5.1
Retail Trade	694	829	3.6
Accommodation, Cafes and Restaurants	302	390	5.2
Transport and Storage	505	570	1.0
Communication Services	539	610	2.5
Finance and Insurance	1388	2064	8.3
Property and Business Services	1391	1953	7.0
Government Administration and Defence	889	1052	3.4
Education	794	1015	5.0
Health and Community Services	1027	1359	5.8
Cultural and Recreational Services	136	160	3.3
Personal and Other Services	282	313	2.1
Non-classifiable economic units	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.
Total industry value added	11601	14379	4.4

Sources: See Appendix 1 and text.

**Table 3b: The Eastern Region Alliance's Residents' Industry Structure, 2006 - 2011
Value Added by Industry (per cent of total value added)**

Industry	Year	
	2006 %	2011 %
Agriculture, Forestry and Fishing	0.6	0.8
Mining	3.5	3.6
Manufacturing	11.3	7.8
Electricity, Gas and Water Supply	3.5	3.3
Construction	7.3	7.4
Wholesale Trade	5.2	5.4
Retail Trade	6.0	5.8
Accommodation, Cafes and Restaurants	2.6	2.7
Transport and Storage	4.4	4.0
Communication Services	4.6	4.2
Finance and Insurance	12.0	14.4
Property and Business Services	12.0	13.6
Government Administration and Defence	7.7	7.3
Education	6.8	7.1
Health and Community Services	8.9	9.5
Cultural and Recreational Services	1.2	1.1
Personal and Other Services	2.4	2.2
Non-classifiable economic units	n.a.	n.a.
Not stated	n.a.	n.a.
Total	100.0	100.0

Source: Table 3a, above.

As shown in Tables 2a and 2b, the dominating economic sectors in the Eastern Region Alliance are finance and insurance, property and business services, health and community services, retail trade, education and construction. These sectors together comprise 67 per cent of ERA's economy. ERA's economy is increasingly dependent on these six sectors. These sectors are not the fastest-growing sectors but their growth has been above average (with the exception of retail trade). Similarly, as shown in Tables 3a and 3b, the dominating economic sectors in the economy employing residents of ERA are finance and insurance, property and business services, health and community services, manufacturing, construction and government administration and defence. These sectors together comprise 60 per cent of ERA's residents' economy. ERA's residents' economy is more diversified than ERA's economy itself. Manufacturing and government administration and defence are more important for ERA's residents than they are for ERA's economy itself, while the reverse is true of health and community services and retail trade, which are less important for ERA's residents than they are for ERA's economy.

The Herfindahl Index of Diversification¹ for the Eastern Region Alliance's economic structure, measured by the value added created by each industry, is 0.09, which indicates a highly diversified economic structure. ERA's residents' economy is even more highly diversified ($H = 0.08$). These economic structures are very resilient as they are not heavily dependent on any particular sector's economic fortunes (like Playford, with its dominating manufacturing sector, for example).

Sectors that are not essentially driven by local demand, and that have a large share of ERA's economy or that have a medium share and are growing at least as fast as the average for ERA are:

- property and business services (17 per cent share, growing rapidly),
- finance and insurance (14 per cent share, growing rapidly),
- health and community services (13 per cent share, growing rapidly)
- retail trade (9 per cent share, growing slowly),
- education (8 per cent share, growing rapidly), and
- construction (7 per cent share, growing rapidly).

These sectors are ERA's main economic *drivers*. They comprise 68 percent of ERA's economy. It is important for ERA to raise the growth rate of its large retail sector.

The economic drivers of the ERA residents' economy are:

- finance and insurance (14 per cent share, growing rapidly),
- property and business services (14 per cent share, growing rapidly),
- health and community services (10 per cent share, growing rapidly)
- manufacturing (8 per cent share, shrinking rapidly),
- education (7 per cent share, growing rapidly), and
- construction (7 per cent share, growing rapidly).

These sectors are the same as ERA's main economic drivers (with the exception of retail trade). They comprise 67 percent of the ERA residents' economy. It is important for ERA's residents that manufacturing's decline be arrested.

¹ The Herfindahl index, $H = \sum s_i^2$ where s_i is the share of industry i in ERA's GRP. Values of $H < 0.1$ indicate a highly diversified industrial structure, values of H between 0.1 and 0.18 indicate a moderate lack of diversification, and values of H greater than 0.18 indicate a major lack of diversification in the industrial structure.

Several of the remaining sectors show promise as potential economic drivers. Mining is being driven by the services required by the increase in exploration and mining activity in the State over the past 20 years. The decision by BHP Billiton not to proceed with the expansion of the Olympic Dam mine is likely to be reflected in a slowdown in the rate of increase of mining's share of the South Australian economy (and ERA's economy). Accommodation, cafes and restaurants, while small, has grown quite fast over the past five years. These sectors cater to tourism and leisure activities that are correlated with increasing affluence and education. ERA should consider an economic future that is based in part on its cultural, recreational and leisure assets. Liveability is a very important ingredient in the economic prospects of all first world economies.

Employment by industry in the Eastern Region Alliance and among residents of the Eastern Regional Alliance

Census data describing the number of persons employed by each industry in the Eastern Region Alliance (or who reside in the Eastern Region Alliance) in 2006 and 2011 are presented in Tables 4a, 4b, 5a and 5b, below.

**Table 4a: The Eastern Region Alliance's Industry Structure, 2006 - 2011
Employment by Industry (persons)**

Industry	Year		2006-2011 % p.a.
	2006	2011	
Agriculture, Forestry and Fishing	239	247	0.7
Mining	297	578	14.2
Manufacturing	5467	4616	-3.3
Electricity, Gas and Water Supply	801	747	-1.4
Construction	4810	5967	4.4
Wholesale Trade	2987	2668	-2.2
Retail Trade	13817	13713	-0.2
Accommodation, Cafes and Restaurants	5755	6163	1.4
Transport and Storage	1685	1563	-1.5
Communication Services	1617	1432	-2.4
Finance and Insurance	3561	3247	-1.8
Property and Business Services	13452	13647	0.3
Government Administration and Defence	3503	3413	-0.5
Education	8474	9068	1.4
Health and Community Services	14809	16688	2.4
Cultural and Recreational Services	927	1037	2.3
Personal and Other Services	4507	4726	1.0
Non-classifiable economic units	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.
Total	86708	89522	0.6

Sources: See Appendix 1 and text.

Table 4b: The Eastern Region Alliance's Industry Structure, 2006 - 2011
Employment by Industry (per cent of total employment)

Industry	Year	
	2006	2011
	%	%
Agriculture, Forestry and Fishing	0.3	0.3
Mining	0.3	0.6
Manufacturing	6.3	5.2
Electricity, Gas and Water Supply	0.9	0.8
Construction	5.5	6.7
Wholesale Trade	3.4	3.0
Retail Trade	15.9	15.3
Accommodation, Cafes and Restaurants	6.6	6.9
Transport and Storage	1.9	1.7
Communication Services	1.9	1.6
Finance and Insurance	4.1	3.6
Property and Business Services	15.5	15.2
Government Administration and Defence	4.0	3.8
Education	9.8	10.1
Health and Community Services	17.1	18.6
Cultural and Recreational Services	1.1	1.2
Personal and Other Services	5.2	5.3
Non-classifiable economic units	n.a.	n.a.
Not stated	n.a.	n.a.
Total	100.0	100.0

Source: Table 4a, above.

Table 5a: The Eastern Region Alliance's Residents' Industry Structure, 2006 - 2011
Employment by Industry (persons)

Industry	Year		
	2006	2011	2006-2011 % p.a.
Agriculture, Forestry and Fishing	695	658	-1.1
Mining	864	1266	7.9
Manufacturing	13242	11513	-2.8
Electricity, Gas and Water Supply	1425	1840	5.2
Construction	9050	10105	2.2
Wholesale Trade	5549	5018	-2.0
Retail Trade	16392	15555	-1.0
Accommodation, Cafes and Restaurants	7973	8676	1.7
Transport and Storage	4371	4377	0.0
Communication Services	2840	2657	-1.3
Finance and Insurance	6113	5725	-1.3
Property and Business Services	18512	19186	0.7
Government Administration and Defence	10941	11726	1.4
Education	13099	13970	1.3
Health and Community Services	19594	21315	1.7
Cultural and Recreational Services	1876	2012	1.4
Personal and Other Services	5337	5427	0.3
Non-classifiable economic units	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.
Total	137873	141027	0.5

Sources: See Appendix 1 and text.

**Table 5b: The Eastern Region Alliance's Residents' Industry Structure, 2006 - 2011
Employment by Industry (per cent of total employment)**

Industry	Year	
	2006	2011
	%	%
Agriculture, Forestry and Fishing	0.5	0.5
Mining	0.6	0.9
Manufacturing	9.6	8.2
Electricity, Gas and Water Supply	1.0	1.3
Construction	6.6	7.2
Wholesale Trade	4.0	3.6
Retail Trade	11.9	11.0
Accommodation, Cafes and Restaurants	5.8	6.2
Transport and Storage	3.2	3.1
Communication Services	2.1	1.9
Finance and Insurance	4.4	4.1
Property and Business Services	13.4	13.6
Government Administration and Defence	7.9	8.3
Education	9.5	9.9
Health and Community Services	14.2	15.1
Cultural and Recreational Services	1.4	1.4
Personal and Other Services	3.9	3.8
Non-classifiable economic units	n.a.	n.a.
Not stated	n.a.	n.a.
Total	100.0	100.0

Source: Table 5a, above.

The dominating employment sectors in the Eastern Region Alliance are health and community services (providing 19 per cent of ERA's jobs), retail trade and property and business services (each 15 per cent of jobs) and education (10 per cent) – three of these are economic drivers. ERA's five economic driver sectors provide more than half (54 per cent) of ERA's employment, emphasising the significance of these sectors in ERA's economy.

The dominating employment sectors for residents of ERA are health and community services (providing 15 per cent of residents' jobs), property and business services (14 per cent), retail trade (11 per cent) and education (10 per cent) – three of these are again economic drivers. ERA's five economic driver sectors provide half (50 per cent) of ERA residents' employment.

Notwithstanding the decline in manufacturing jobs both in ERA's economy itself and for ERA's residents, there is a high degree of similarity in the distribution of employment by industry across both Censuses.

Labour productivity (value added per person employed) by industry in the Eastern Region Alliance

Data describing labour productivity (value added per person employed) in each industry in the Eastern Region Alliance in 2006 and 2011 are presented in Tables 6 and 7, below. These productivity estimates are the production figures for each industry in Table 2 divided by the corresponding employment figures for each industry in Table 4. It should be noted that these productivity estimates are current price measures which capture price as well as volume changes.

Table 6: The Eastern Region Alliance's Industry Structure, 2006 - 2011
Productivity (Value added per person) by Industry, \$, current prices

Industry	Year		2006- 2011 % p.a.
	2006 \$	2011 \$	
Agriculture, Forestry and Fishing	99626	166158	10.8
Mining	473856	405708	-3.1
Manufacturing	99095	97693	-0.3
Electricity, Gas and Water Supply	286959	256524	-2.2
Construction	93527	105269	2.4
Wholesale Trade	109750	155647	7.2
Retail Trade	42321	53269	4.7
Accommodation, Cafes and Restaurants	37899	44904	3.5
Transport and Storage	115618	130182	2.4
Communication Services	189811	229609	3.9
Finance and Insurance	226994	360441	9.7
Property and Business Services	75139	101817	6.3
Government Administration and Defence	81207	89742	2.0
Education	60593	72643	3.7
Health and Community Services	52433	63770	4.0
Cultural and Recreational Services	72384	79293	1.8
Personal and Other Services	52839	57732	1.8
Non-classifiable economic units	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.
All Industries (ERA)	77467	94334	4.0
(ERA Residents)	84146	101957	3.9

Sources: See Appendix 1 and text.

Table 7: The Eastern Region Alliance's Industry Structure, 2006 - 2011
Productivity (Value added per person) by Industry (per cent of average ERA productivity)

Industry	ERA		Res	
	Year		Year	
	2006	2011	2006	2011
	%	%	%	%
Agriculture, Forestry and Fishing	129	176	118	163
Mining	612	430	563	398
Manufacturing	128	104	118	96
Electricity, Gas and Water Supply	370	272	341	252
Construction	121	112	111	103
Wholesale Trade	142	165	130	153
Retail Trade	55	56	50	52
Accommodation, Cafes and Restaurants	49	48	45	44
Transport and Storage	149	138	137	128
Communication Services	245	243	226	225
Finance and Insurance	293	382	270	354
Property and Business Services	97	108	89	100
Government Administration and Defence	105	95	97	88
Education	78	77	72	71
Health and Community Services	68	68	62	63
Cultural and Recreational Services	93	84	86	78
Personal and Other Services	68	61	63	57
Non-classifiable economic units	n.a.	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.	n.a.
All Industries	100	100	100	100

Source: Table 6, above.

Excluding the exceptionally productive (but small) mining sector, the highest productivity sectors in the Eastern Region Alliance are finance and insurance, electricity, gas and water supply, and communication services (about 200 per cent or more above average labour productivity). Other above-average productivity sectors are wholesale trade, agriculture, forestry and fishing, and transport and storage. Average productivity sectors are manufacturing, construction and government administration and defence. Low productivity sectors are retail trade, accommodation, cafes and restaurants, education, health and community services, cultural and recreational services, and personal and other services. Some of these low productivity sectors employ many of their staff on a part time or casual basis, which would account for some (possibly much) of these sectors' lower productivity *per person*.

Sectors with above average growth in productivity over the last five years are finance and insurance, agriculture forestry and fishing, and wholesale trade. Sectors with significantly below average growth rates of productivity are construction, property and business services, health and community services, personal and other services, education and manufacturing.

It is notable that the average productivity of working *residents of* ERA (wherever they may work) is greater than the average productivity of persons *working in* ERA. This is because the distribution of working residents across sectors is more heavily weighted with high productivity sectors than is the distribution of persons working in ERA.

Evolution of the commuting origins of workers in different industries and with different qualifications in the Eastern Region Alliance

Where do the people working in the Eastern Region Alliance in different industries come from and what educational qualifications did they have? Census data for 2011 and 2006 are available with consistent classifications of educational qualifications and local government areas (LGAs) enabling these questions to be addressed.

Six areas of origin have been identified:

1. The **Eastern Region Alliance** itself (LGAs of Burnside 40700, Campbelltown 40910, Norwood Payneham & St Peters 45290, Prospect 46510, Tea Tree Gully 47700, Unley 47980 and Walkerville 48260);
2. **North Adelaide** (LGAs of Port Adelaide Enfield 45890, Salisbury 47140, Playford 45680, Gawler 42030, Mallala 43920, Light 43650 and Barossa 40310);
3. **East Adelaide** (LGAs of Adelaide Hills 40120, and Mount Barker 44550);
4. **South Adelaide** (LGAs of Mitcham 44340, Marion 44060, Holdfast Bay 42600, Onkaparinga 45340, Alexandrina 40220, Yankalilla 48750, and Victor Harbor 48050);
5. **West Adelaide** (LGAs of West Torrens 48410 and Charles Sturt 41060);
6. **Other** (Adelaide LGA 40070 and all the other people who worked in the Eastern Regional Alliance at the Census date).

Table 8, below, and Appendix 2, show that large and growing numbers of workers commute to ERA from the surrounding suburbs. In fact, while employment of people from outside ERA increased from all origins (except Adelaide CBD), employment of people from ERA was virtually constant. Those commuters located North and West of ERA are increasing faster than those located East and South. Fastest-growing of all are the very small number of workers whose home is country areas or interstate (Other).

Table 8: Commuting Origins of Workers in the Eastern Region Alliance, 2006 and 2011, persons

Worker Origin	Year		Diff.	% inc
	2006 pers	2011 pers		
ERA	47,075	47,019	-56	-0.1
North Adelaide	14,342	16,173	1,831	12.8
East Adelaide	4,108	4,202	94	2.3
South Adelaide	13,402	13,616	214	1.6
West Adelaide	6,122	6,725	603	9.8
CBD	1,090	1,080	-10	-0.9
Other	573	706	133	23.2
All Origins	86,712	89,521	2,809	3.2

Source: See Appendix 1 and text.

Appendix 2 gives detail on the origins of workers by industry.

Table 9, below, shows inter-Censal growth in jobs in the Eastern Region Alliance by educational qualification. As can be seen, there is a very strong upward trend in the qualifications of workers in ERA over this five-year period. Sixty per cent of workers in ERA now hold a post-school qualification.

Table 9: Qualifications of Workers in the Eastern Regional Alliance, 2006 and 2011, persons

Highest Qualification	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
Post Graduate	5,103	6,738	1,635	32.0
Degree/Diploma	25,225	28,764	3,539	14.0
Certificate	16,786	17,670	884	5.3
None	39,598	36,349	-3,249	-8.2
All qualifications	<u>86,712</u>	<u>89,521</u>	<u>2,809</u>	<u>3.2</u>

Source: See Appendix 1 and text.

Appendix 3 provides tables showing the highest educational qualification of workers in the Eastern Region Alliance classified by their commuting origin. Every commuting origin identified shows the same general pattern as Table 9, although the rates of change vary. The fastest rates of increase for commuters holding post graduate qualifications are workers residing in North and West Adelaide. This pattern correlates reasonably well with the pattern of growth rates of workers from the different origins shown in Table 8. It seems plausible that one strong reason for differences in commuting rates between the various geographical origins is differences in the settlement patterns of younger and more skilled workers, who tend to be concentrated more in North and West Adelaide.

Evolution of the commuting destinations of workers in different industries and with different qualifications from the Eastern Region Alliance

Where do the people residing in the Eastern Region Alliance work and what educational qualifications do they have? Census data for 2011 and 2006 are available with consistent classifications of educational qualifications and local government areas (LGAs) enabling these questions to be addressed.

Six areas of destination have been identified:

1. The **Eastern Region Alliance** itself (LGAs of Burnside 40700, Campbelltown 40910, Norwood Payneham St Peters 45290, Prospect 46510, Tea Tree Gully 47700, Unley 47980 and Walkerville 48260);
2. **North Adelaide** (LGAs of Port Adelaide Enfield 45890, Salisbury 47140, Playford 45680, Gawler 42030, Mallala 43920, Light 43650 and Barossa 40310);
3. **East Adelaide** (LGAs of Adelaide Hills 40120, and Mount Barker 44550);
4. **South Adelaide** (LGAs of Mitcham 44340, Marion 44060, Holdfast Bay 42600, Onkaparinga 45340, Alexandrina 40220, Yankalilla 48750, and Victor Harbor 48050);
5. **West Adelaide** (LGAs of West Torrens 48410 and Charles Sturt 41060);
6. **Other** (Adelaide LGA 40070 and all the other people who worked in the Eastern Regional Alliance at the Census date).

Table 10, below, and Appendix 4, show that a large and slowly-growing number of workers commute for work from ERA to Adelaide CBD and surrounding suburbs. In fact, the large number of ERA residents who commute for work to Adelaide CBD increased significantly over the past five years. Employment of people in ERA who reside in ERA fell fractionally. It is not clear what to make of the substantial “Other” category, as this category includes a large number of people whose destination was not stated or was inadequately described.

Table 10: Commuting Destinations of Workers who Reside in the Eastern Region Alliance, 2006 and 2011, persons

Worker Origin	Year		Diff.	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA*	47,074	47,017	-57	-0.1
North Adelaide	24,674	24,424	-250	-1.0
East Adelaide	1,031	1,082	51	4.9
South Adelaide	6,026	6,052	26	0.4
West Adelaide	12,809	12,284	-525	-4.1
CBD	33,386	35,342	1,956	5.9
Other, n.s. and i.d.#	12,873	14,826	1,953	15.2
All Origins	<u>137,873</u>	<u>141,027</u>	<u>3,154</u>	<u>2.3</u>

* It is not clear why the numbers in this row differ fractionally from the numbers in row 1 of Table 8, above.

n.s. and i.d. mean “not stated” and “inadequately described”.

Source: See Appendix 1 and text.

Appendix 4 gives detail on the origins of workers by industry.

Table 11, below, shows inter-Censal growth in jobs held by residents of the Eastern Regional Alliance by educational qualification. As can be seen, there is a very strong upward trend in the qualifications of workers who reside in ERA over this five-year period. Nearly two-thirds of workers who reside in ERA now hold a post-school qualification.

Table 11: Qualifications of Workers who reside in the Eastern Regional Alliance, 2006 and 2011, persons

Highest Qualification	Year		Diff.	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
Post Graduate	10,742	14,140	3,398	31.6
Degree/Diploma	42,820	48,304	5,484	12.8
Certificate	25,510	25,894	384	1.5
None	58,801	52,689	-6,112	-10.4
All qualifications	<u>137,873</u>	<u>141,027</u>	<u>3,154</u>	<u>3.2</u>

Source: See Appendix 1 and text.

Appendix 5 provides tables showing the highest educational qualification of workers in the Eastern Region Alliance classified by their commuting destination.

Scenarios of the future size and structure of the Eastern Region Alliance's economy

It is possible to project the potential size and structure of ERA's economy by making assumptions about the economy's rate of growth and the evolution of its production, employment and skill structure. We have attempted two simplified projections of this type for ERA over the next ten and twenty years. Such an exercise is useful in identifying potential economic development issues for ERA.

We have chosen two growth scenarios:

1. an acceleration of ERA's GRP growth to 4 per cent p.a. over the 20 years from 2011 to 2031. We have called this the *fast growth scenario* which is intended to model very positive effects of the introduction of the development options outlined in this report in the context of an improvement in South Australia's growth rate to 3.5 per cent p.a., equal to Australia's expected growth;
2. maintaining ERA's GRP growth rate at its present rate of 2 per cent p.a. over the 20 years from 2011 to 2031. We call this the *slow growth scenario* which is intended to model the effects on ERA's economy of a less successful application of the development options in this report together with an economic slowdown for the State from 2.6 per cent p.a. over the past 5 years to 2 per cent p.a. over the next 20 years.

South Australia's growth rate of real GSP is assumed to be

1. 3.5 per cent p.a. over the 20 years from 2011 to 2031 in the fast growth scenario, and
2. 2.0 per cent p.a. in the slow growth scenario, somewhat less than its growth rate over the past five years.

Outcomes in each scenario are projected at 2021 and 2031.

In the fast growth scenario, overall labour productivity growth in both ERA and the State is assumed to be 2.0 per cent p.a. (in constant price terms), roughly a 0.6 per cent p.a. increase on the productivity growth of the past five years in ERA and a 0.9 per cent p.a. increase in the State as a whole, reflecting greater rates of innovation and private sector investment. The rate of employment growth in ERA is, therefore, expected to be 2.0 per cent p.a. in the period 2011–2031, and in South Australia 1.5 per cent p.a.

In the slow growth scenario, overall labour productivity growth in both ERA and the State is assumed to be 1.0 per cent p.a., roughly a 0.4 per cent p.a. decrease on the average rate of productivity growth of the past five years in ERA, and about the same rate as in the State as a whole over the past five years. In consequence, the rate of employment growth from 2011–2013 is expected to be 1.0 per cent p.a. in both ERA and the State.

In both scenarios, the industry structure of value added and employment in ERA's economy from 2011 to 2031 is assumed to reflect the effects of local, State and Commonwealth economic development policies that modify the trends observed over the five years from 2006 – 2011. In particular, the share in ERA's economy of manufacturing and of government administration and defence are expected to fall, while the shares of finance and insurance, property and business services and health and community services are assumed to rise. Employment in each industry is calculated by altering the shares of employment in each industry by the relative change in shares of value added in each industry between 2011 and 2021 (or 2031). This procedure increases labour productivity at the same rate in each sector. The sum of sector increases in value added and

employment growth in each sector are set equal to overall value added and employment growth.

In both scenarios, the post school qualifications structure of employment in the Eastern Region Alliance is assumed to evolve in the same direction, but at half the rate, as in the five years from 2006 to 2011. Hence, the share of persons with postgraduate degrees is assumed to increase from 7.5 per cent in 2011 to 8.5 per cent in 2021 and to 9.5 per cent in 2031; the share of persons with degrees and graduate diplomas is assumed to increase from 32.1 per cent in 2011 to 34 per cent in 2021 and to 36 per cent in 2031; the share of persons with certificates is assumed to increase from 19.7 per cent in 2011 to 20 per cent in 2021 and to 20.5 per cent in 2031; and the share of persons with qualifications not stated, not applicable and inadequately described is assumed to *decrease* from 40.6 per cent in 2011 to 37.5 per cent in 2021 and to 34 per cent in 2031.

In both scenarios, the commuting origins of workers in ERA are expected to alter to reflect a small increase in the share of workers residing in ERA and a small fall in the shares of workers residing in all other commuting origins.

Fast growth scenario

In the fast growth scenario, ERA's Gross Regional Product reaches \$15 billion in 2021 and \$22 billion in 2031 (compared with \$10 billion now). ERA's GRP will represent 11.7 per cent of South Australia's Gross State Product of \$129 billion in 2021 and 12.2 per cent of South Australia's Gross State Product of \$182 billion in 2031 (compared with 11.1 per cent of SA's GSP of \$91 billion now). Employment in the ERA reaches 109,000 in 2021 and 132,000 in 2031 (compared with 89,522 now).

Tables 11 and 12 show the evolution of value added by industry in the Eastern Region Alliance according to the assumptions of the fast growth scenario from 2011 - 2031.

**Table 12: The Eastern Region Alliance's Industry Structure, Fast Growth Scenario, 2011-2031
Value Added by Industry (\$million, constant 2011 prices)**

Industry	Year				
	2011	2021	2031	2011-2021	2011-2031
	\$m	\$m	\$m	% p.a	% p.a.
Agriculture, Forestry and Fishing	41	63	93	4.4	4.2
Mining	235	313	370	2.9	2.3
Manufacturing	451	500	648	1.0	1.8
Electricity, Gas and Water Supply	192	250	463	2.7	4.5
Construction	628	875	1295	3.4	3.7
Wholesale Trade	415	625	833	4.2	3.5
Retail Trade	730	1125	1573	4.4	3.9
Accommodation, Cafes and Restaurants	277	438	740	4.7	5.0
Transport and Storage	204	313	370	4.4	3.0
Communication Services	329	500	648	4.3	3.4
Finance and Insurance	1170	1750	2683	4.1	4.2
Property and Business Services	1389	2125	3238	4.3	4.3
Government Administration and Defence	306	438	555	3.7	3.0
Education	659	1000	1480	4.3	4.1
Health and Community Services	1064	1625	2591	4.3	4.6
Cultural and Recreational Services	82	188	370	8.7	7.8
Personal and Other Services	273	375	555	3.2	3.6
Non-classifiable economic units	n.a.	n.a.	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.	n.a.	n.a.
Total	8445	12501	18504	4.0	4.0

Sources: Calculations and assumptions as described in the text.

Table 13: The Eastern Region Alliance's Industry Structure, Fast Growth Scenario, 2011-2031, Value Added by Industry (per cent)

Industry	Year		
	2011	2021	2031
	%	%	%
Agriculture, Forestry and Fishing	0.5	0.5	0.5
Mining	2.8	2.5	2.0
Manufacturing	5.3	4.0	3.5
Electricity, Gas and Water Supply	2.3	2.0	2.5
Construction	7.4	7.0	7.0
Wholesale Trade	4.9	5.0	4.5
Retail Trade	8.6	9.0	8.5
Accommodation, Cafes and Restaurants	3.3	3.5	4.0
Transport and Storage	2.4	2.5	2.0
Communication Services	3.9	4.0	3.5
Finance and Insurance	13.9	14.0	14.5
Property and Business Services	16.5	17.0	17.5
Government Administration and Defence	3.6	3.5	3.0
Education	7.8	8.0	8.0
Health and Community Services	12.6	13.0	14.0
Cultural and Recreational Services	1.0	1.5	2.0
Personal and Other Services	3.2	3.0	3.0
Non-classifiable economic units	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.
Total	100.0	100.0	100.0

Source: Table 12, above.

In the fast growth scenario, as shown in Tables 12 and 13, value added grows in all sectors. ERA's six driver sectors property and business services, finance and insurance, health and community services, retail trade, education and construction increase their share of ERA's economy slightly and generate nearly 70 per cent of ERA's value added in 2031. Sectors growing especially fast are cultural and recreational services (where many elements of the creative industries are to be found), accommodation, cafes and restaurants (reflecting lifestyle demands, some newly-centred on the river, creeks and parks) and, in the second decade, electricity, gas and water supply (reflecting increased water supply developments). There is a building boom as the Eastern Suburbs undergo an upsurge in population and economic activity, in business offices, in the creative industries, in apartment living, in the "café society", in hospital modernisation, in new water businesses, in new businesses associated with the Torrens, the creeks and parks, and in exciting developments in education.

The evolution of employment by industry in the fast growth scenario is shown in Tables 14 and 15, below. Total employment increases from 89,522 persons in 2011 to 108,711 in 2021 and 132,006 in 2031 (i.e., by 21 per cent and 47 per cent, respectively).

Table 14: The Eastern Region Alliance's Industry Structure, Fast Growth Scenario, 2011-2031, Employment by Industry (persons)

Industry	Year				
	2011 Pers.	2021 Pers.	2031 Pers.	2011-2021 % p.a.	2011-2031 % p.a.
Agriculture, Forestry and Fishing	247	326	396	2.8	2.4
Mining	578	544	528	-0.1	-0.0
Manufacturing	4616	4240	4356	-0.1	-0.0
Electricity, Gas and Water Supply	747	761	1188	0.0	2.3
Construction	5967	6740	8184	1.2	1.6
Wholesale Trade	2668	3370	3564	2.4	1.5
Retail Trade	13713	17285	19537	2.3	1.8
Accommodation, Cafes and Restaurants	6163	7827	10824	2.4	2.9
Transport and Storage	1563	1957	1848	2.3	0.8
Communication Services	1432	1739	1848	2.0	1.3
Finance and Insurance	3247	3914	5016	1.9	2.2
Property and Business Services	13647	16959	20725	2.2	2.1
Government Administration and Defence	3413	4022	4092	1.7	0.9
Education	9068	11197	13465	2.1	2.0
Health and Community Services	16688	20546	26797	2.1	2.4
Cultural and Recreational Services	1037	1957	3168	6.6	5.7
Personal and Other Services	4726	5327	6468	1.0	1.6
Non-classifiable economic units	n.a.	n.a.	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.	n.a.	n.a.
Total	89522	108711	132006	2.0	2.0

Source: Table 12 and calculations and assumptions as described in the text.

Table 15: The Eastern Region Alliance's Industry Structure, Fast Growth Scenario, 2011-2031, Employment by Industry (percent)

Industry	Year		
	2011 %	2021 %	2031 %
Agriculture, Forestry and Fishing	0.3	0.3	0.3
Mining	0.6	0.5	0.4
Manufacturing	5.2	3.9	3.3
Electricity, Gas and Water Supply	0.8	0.7	0.9
Construction	6.7	6.2	6.2
Wholesale Trade	3.0	3.1	2.7
Retail Trade	15.3	15.9	14.8
Accommodation, Cafes and Restaurants	6.9	7.2	8.2
Transport and Storage	1.7	1.8	1.4
Communication Services	1.6	1.6	1.4
Finance and Insurance	3.6	3.6	3.8
Property and Business Services	15.2	15.6	15.7
Government Administration and Defence	3.8	3.7	3.1
Education	10.1	10.3	10.2
Health and Community Services	18.6	18.9	20.3
Cultural and Recreational Services	1.2	1.8	2.4
Personal and Other Services	5.3	4.9	4.9
Non-classifiable economic units	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.
Total	100.0	100.0	100.0

Source: Table 14, above.

The sector with the most jobs in ERA in 2021 and 2031 is health and community services (about 19 per cent of all jobs in ERA in 2021 and about 20 per cent in 2031). The increase in the number of jobs in health and community services from 2011–2031 is about 10,000. The other three big employment sectors are property and business services, retail trade and education (about 42 per cent of all jobs in ERA in 2021 and about 41 per cent each in 2031). The increase in the number of jobs from 2011–2031 is about 7,000 in property and business services, about 6,000 in retail trade, and about 4,000 in education. These four large sectors together account for 61 per cent of ERA's jobs in both 2021 and 2031).

The sector with the fastest growing numbers of jobs is cultural and recreational services (more than trebling in size and adding about 2,000 jobs from 2011–2031). This sector is associated with the fast-growing creative industries sector.

Marginally-declining job sectors are mining and manufacturing, reflecting the effects of the end of the exploration and mining boom and the refocussing of manufacturing on small, high productivity, quality, innovative activities.

The evolution of employment by post school qualification in the fast growth scenario is shown in Tables 16 and 17, below.

Table 16: Eastern Region Alliance’s Qualifications Structure, Fast Growth Scenario, Employment by Post School Qualification, 2011, 2021 and 2031 (persons)

Source: Calculations and assumptions as described in the text.

Highest Qualification	2011	2021	Year	2011-2021	2011-2031
	Pers.	Pers.	2031 Pers.	% p.a.	% p.a.
Post Graduate	6738	9240	12541	3.2	3.2
Degree/Diploma	28764	36962	47522	2.5	2.5
Certificate	17670	21742	27061	2.1	2.1
None	36349	40767	44882	1.1	1.1
All Qualifications	89521	108711	132006	2.0	2.0

Table 17: Eastern Region Alliance’s Qualifications Structure, Fast Growth Scenario, Employment by Post School Qualification, 2011, 2021 and 2031 (per cent)

Source: Table 16, above.

Highest Qualification	2011	Year	2031
	%	2021 %	%
Post Graduate	7.5	8.5	9.5
Degree/Diploma	32.1	34.0	36.0
Certificate	19.7	20.0	20.5
None	40.6	37.5	34.0
All Qualifications	100.0	100.0	100.0

Employed persons with university degree or diploma qualifications are projected to increase from 35,500 (nearly 40 per cent of employed persons) in 2011 to more than 46,000 (42.5 per cent of employed persons) in 2021 and to 60,000 (45.5 per cent of employed persons) in 2031. By 2026, there will be nearly 25,000 more persons employed in ERA holding University qualifications than there are now. These skilled and affluent people will provide the backbone of ERA’s economy. They will be young, affluent and cosmopolitan, coming from many countries and backgrounds. Many will choose to live in ERA itself, because of the small and home business opportunities that are flourishing in ERA, creating a strong demand for outstanding lifestyle opportunities, including access to attractive open spaces for recreation and enjoyment, a safe environment and quality cultural and entertainment experiences.

By the same token, the number of employed persons without any post school qualifications will increase by only 8,500 over the next twenty years, falling as a share of employment from just over 40 per cent to just under 35 per cent. Work environments will be increasingly redesigned so that computers (and customers) take over at least some functions presently done by persons without post school qualifications.

Slow growth scenario

In the slow growth scenario, ERA’s Gross Regional Product will reach \$12 billion in 2021 and \$15 billion in 2031 (compared with \$10 billion now). ERA’s GRP is projected

to represent 11 per cent of South Australia's Gross State Product in both 2021 and 2031, the same as in 2011. Employment in ERA will reach 99,000 in 2021 and 109,000 in 2031 (compared with 89,522 now).

Tables 18 and 19, below, show how value added by industry in ERA would evolve from 2011 – 2031, according to the assumptions of the slow growth scenario.

Table 18: The Eastern Region Alliance's Industry Structure, Slow Growth Scenario, 2011-2031, Value Added by Industry (\$million, constant 2011 prices)

Industry	Year				
	2011 \$m	2021 \$m	2031 \$m	2011-2021 % p.a	2011-2031 % p.a.
Agriculture, Forestry and Fishing	41	51	63	2.2	2.2
Mining	235	257	251	0.9	0.3
Manufacturing	451	412	439	-0.1	-0.1
Electricity, Gas and Water Supply	192	206	314	0.7	2.5
Construction	628	721	878	1.4	1.7
Wholesale Trade	415	515	565	2.2	1.6
Retail Trade	730	926	1067	2.4	1.9
Accommodation, Cafes and Restaurants	277	360	502	2.7	3.0
Transport and Storage	204	257	251	2.3	1.0
Communication Services	329	412	439	2.3	1.5
Finance and Insurance	1170	1441	1820	2.1	2.2
Property and Business Services	1389	1750	2196	2.3	2.3
Government Administration and Defence	306	360	376	1.6	1.0
Education	659	824	1004	2.3	2.1
Health and Community Services	1064	1338	1757	2.3	4.6
Cultural and Recreational Services	82	154	251	6.5	5.8
Personal and Other Services	273	309	376	1.2	1.6
Non-classifiable economic units	n.a.	n.a.	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.	n.a.	n.a.
Total	8445	10294	12549	2.0	2.0

Sources: Calculations and assumptions as described in the text.

Table 19: The Eastern Region Alliance's Industry Structure, Slow Growth Scenario, 2011-2031, Value Added by Industry (per cent)

Industry	Year		
	2011	2021	2031
	%	%	%
Agriculture, Forestry and Fishing	0.5	0.5	0.5
Mining	2.8	2.5	2.0
Manufacturing	5.3	4.0	3.5
Electricity, Gas and Water Supply	2.3	2.0	2.5
Construction	7.4	7.0	7.0
Wholesale Trade	4.9	5.0	4.5
Retail Trade	8.6	9.0	8.5
Accommodation, Cafes and Restaurants	3.3	3.5	4.0
Transport and Storage	2.4	2.5	2.0
Communication Services	3.9	4.0	3.5
Finance and Insurance	13.9	14.0	14.5
Property and Business Services	16.5	17.0	17.5
Government Administration and Defence	3.6	3.5	3.0
Education	7.8	8.0	8.0
Health and Community Services	12.6	13.0	14.0
Cultural and Recreational Services	1.0	1.5	2.0
Personal and Other Services	3.2	3.0	3.0
Non-classifiable economic units	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.
Total	100.0	100.0	100.0

Source: Table 18, above.

In the slow growth scenario, as shown in Tables 18 and 19, the *structure* of economic development is the same as in the fast growth scenario, but the *rate* of economic progress is less. Manufacturing value added shrinks, marginally. Fast-growing sectors include cultural and recreational services, followed by health and community services and accommodation, cafes and restaurants. But the overall economic growth rate is modest.

The evolution of employment by industry in the slow growth scenario is shown in Tables 20 and 21, below. Total employment increases from 89,522 persons in 2011 to 98,788 persons in 2021 and 109,022 persons in 2031 (i.e., by 10 per cent and 22 per cent, respectively). The growth in jobs is about 18 per cent less than the growth in jobs in the fast growth scenario).

Table 20: The Eastern Region Alliance's Industry Structure, Slow Growth Scenario, 2011-2031, Employment by Industry (persons)

Industry	Year				
	2011 Pers.	2021 Pers.	2031 Pers.	2011-2021 % p.a.	2011-2031 % p.a.
Agriculture, Forestry and Fishing	247	296	327	1.8	1.4
Mining	578	494	436	-0.2	-0.1
Manufacturing	4616	3853	3598	-0.2	-0.1
Electricity, Gas and Water Supply	747	692	981	-0.1	1.4
Construction	5967	6125	6759	0.3	0.6
Wholesale Trade	2668	3062	2944	1.4	0.5
Retail Trade	13713	15707	16135	1.4	0.8
Accommodation, Cafes and Restaurants	6163	7113	8940	1.4	1.9
Transport and Storage	1563	1778	1526	1.3	-0.1
Communication Services	1432	1581	1526	1.0	0.3
Finance and Insurance	3247	3556	4143	0.9	1.2
Property and Business Services	13647	15411	17116	1.2	1.1
Government Administration and Defence	3413	3655	3380	0.7	-0.0
Education	9068	10175	11120	1.2	1.0
Health and Community Services	16688	18671	22131	1.1	1.4
Cultural and Recreational Services	1037	1778	2617	5.5	4.7
Personal and Other Services	4726	4841	5342	0.2	0.6
Non-classifiable economic units	n.a.	n.a.	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.	n.a.	n.a.
Total	89522	98788	109022	1.0	1.0

Source: Table 12 and calculations and assumptions as described in the text.

Table 21: The Eastern Region Alliance’s Industry Structure, Slow Growth Scenario, 2011-2031, Employment by Industry (percent)

Industry	Year		
	2011	2021	2031
	%	%	%
Agriculture, Forestry and Fishing	0.3	0.3	0.3
Mining	0.6	0.5	0.4
Manufacturing	5.2	3.9	3.3
Electricity, Gas and Water Supply	0.8	0.7	0.9
Construction	6.7	6.2	6.2
Wholesale Trade	3.0	3.1	2.7
Retail Trade	15.3	15.9	14.8
Accommodation, Cafes and Restaurants	6.9	7.2	8.2
Transport and Storage	1.7	1.8	1.4
Communication Services	1.6	1.6	1.4
Finance and Insurance	3.6	3.6	3.8
Property and Business Services	15.2	15.6	15.7
Government Administration and Defence	3.8	3.7	3.1
Education	10.1	10.3	10.2
Health and Community Services	18.6	18.9	20.3
Cultural and Recreational Services	1.2	1.8	2.4
Personal and Other Services	5.3	4.9	4.9
Non-classifiable economic units	n.a.	n.a.	n.a.
Not stated	n.a.	n.a.	n.a.
Total	100.0	100.0	100.0

Source: Table 20, above.

The sector with the most jobs in ERA in 2031 is health and community services (about 20 per cent of all jobs). The increase in the number of jobs in health and community services from 2011–2031 is about 5,500 – only half of the number in the fast growth scenario. The other three big employment sectors are property and business services, retail trade and education. The increase in the number of jobs from 2011–2031 is about 3,500 in property and business services, about 2,400 in retail trade and about 2,000 in education. These increases are half or less of the corresponding increases in the fast growth scenario.

The only sector with rapidly growing job numbers is the small cultural and recreational services (creative industries) sector. Employment in mining, manufacturing, transport and storage and government administration and defence each decline marginally. Employment in electricity, gas and water supply falls fractionally up to 2021, but recovers rapidly as ERA’s water businesses gather momentum.

The evolution of employment by post school qualification in the slow growth scenario is shown in Tables 22 and 23, below.

Table 22: Eastern Region Alliance's Qualifications Structure, Slow Growth Scenario, Employment by Post School Qualification, 2011, 2021 and 2031 (persons)

Highest Qualification	Year				
	2011 Pers.	2021 Pers.	2031 Pers.	2011-2021 % p.a.	2011-2031 % p.a.
Post Graduate	6738	8397	10357	2.2	2.2
Degree/Diploma	28764	33588	39248	1.6	1.6
Certificate	17670	19758	22350	1.2	1.2
None	36349	37045	37067	0.1	0.1
All Qualifications	89521	98788	109022	1.0	1.0

Source: Calculations and assumptions as described in the text.

Table 23: Eastern Region Alliance's Qualifications Structure, Slow Growth Scenario, Employment by Post School Qualification, 2011, 2021 and 2031 (per cent)

Highest Qualification	Year		
	2011 %	2021 %	2031 %
Post Graduate	7.5	8.5	9.5
Degree/Diploma	32.1	34.0	36.0
Certificate	19.7	20.0	20.5
None	40.6	37.5	34.0
All Qualifications	100.0	100.0	100.0

Source: Table 16, above.

Employed persons with university degree or diploma qualifications are projected to increase from 35,500 (nearly 40 per cent of employed persons) in 2011 to 42,000 (42.5 per cent of employed persons) in 2021 and to 49,500 (45.5 per cent of employed persons) in 2031. By 2026, there will be nearly 14,000 more persons employed in ERA holding University qualifications than there are now. As in the fast growth scenario, these skilled and affluent people will provide the backbone of ERA's economy. Many will choose to live in ERA itself, because of the small and home business opportunities that are flourishing in ERA, creating a demand for lifestyle opportunities, access to attractive open spaces for recreation and enjoyment, a safe environment and quality cultural and entertainment experiences.

By the same token, the number of employed persons without any post school qualifications will increase by less than 1,000 over the next twenty years, falling as a share of employment from just over 40 per cent to just under 35 per cent. As in the fast growth scenario, computers (and customers) take over at least some functions presently undertaken by persons without post school qualifications.

An economic development strategy for the Eastern Region Alliance

Overview

The local governments comprising ERA are Burnside, Campbelltown, Norwood Payneham & St Peters, Prospect, Tea Tree Gully, and Unley and Walkerville. Effective delivery of economic development policy by a local government is helped by such alliances with other local governments so as to provide the scope and leverage over outcomes that potentially-larger allies – State and Commonwealth governments, large firms and the community sector – seek.

ERA's population and economy are substantial. While each of the individual local economies is different in structure, and strategies to enhance their development vary in detail and emphasis, their economic growth strategies share a common feature: to make the local area as attractive as possible for businesses likely to thrive in an advanced country like Australia.

ERA (and its constituent Councils) should, therefore, target a mix of quality financial, professional and business services, creative industries like advertising, film, television and radio, quality retail, quality health and education, non-chain cafes and restaurants, high tech niche manufacturing and food production, tourism (local, national and international), and utilities like water and communications.

The appropriate overarching economic development strategy for ERA is to induce the South Australian and Commonwealth governments to put strategies in place that support the growth of these industries in Australia at large (without necessarily favouring ERA with special deals of one sort or another). If the Australian and South Australian policy context is favourable to the growth of these economic activities, it is very likely that ERA will capture a significant share of the growth in these activities.

To make this more likely, ERA should offer to be a pilot space for the trial of Commonwealth and State programs aimed at supporting the development of industries that ERA wants to have grow within its boundaries, including, for example, the roll-out of super-fast broadband like the NBN, creative industries initiatives, hospital and health initiatives, education initiatives (like Independent Government schools), water industry competition, aged care initiatives, tourism initiatives, advanced manufacturing (especially in food), and so on. Proposals should be framed as collaborative exercises based on effective partnerships. It is important, of course, that ERA not lose control of such pilot programs to the higher levels of government, but has an effective say in their execution and evaluation.

ERA's Federal Initiatives Group (ERA-FIG) has already moved in this direction, supporting proposals to higher levels of government in three "transformative" areas – *active ageing* (making greater use of skilled retirees); *smart region* (supporting the evolution of creative industries and preventative health activities); and *sustainable water* (supporting biodiversity, energy saving and waste water recycling).

Another initiative that ERA could pioneer is reform of State and Local Government taxes to support local economic development. For example, whatever people might think about local government rates on land, such a tax is a good tax in the sense that taxing land does not distort land use decisions. On the other hand, the State stamp duty on land sales is a bad tax in that it induces people not to sell houses that they would otherwise sell.

ERA's local governments could offer to the South Australian government to increase rates sufficiently to be able to transfer to the South Australian government annually some affordable proportion of the amount expected to be raised from stamp duty on property sales in ERA. A precedent exists in the State Government's reductions in stamp duty on sales of apartments in the City, although this discriminatory tax introduces other distortions. A uniform reduction in stamp duty on property sales would increase construction and property transactions in ERA and lead to an increase in productivity (and lower costs) due to more appropriate uses of property. This would be an appropriate incentive supporting ERA's economic development strategy.

Increases in Council rate revenues beyond projected amounts (because of rising property values due to the reduction in stamp duty) should result in cuts in rates, particularly for residents, so as to make clear the advantage of attracting more businesses locally.

Similarly, parking regulations and charges should reflect opportunity costs and the need to ration parking spaces, and not be used essentially to raise revenue. When the rationing charge for on-street parking gets high enough, the provision of off-street parking becomes economically rational and feasible. The introduction of rationing of on-street parking in ERA's inner-city local government areas is becoming urgent. Commuters into the CBD are adjusting to rising CBD parking charges in part by on-street parking (at low cost) in neighbouring suburbs to the CBD.

What strengthens local economic development in the long run is not tax cuts and similar financial inducements for selected firms, but fundamental changes to the economics of the local area (like abolishing stamp duty on property transactions) that offer permanent increases in demand for the area's products and services and reductions in the costs of doing business to all firms. Initiating NBN arrangements that reduce communication, purchasing and marketing costs (as ERA is doing) and initiatives that improve the area's liveability are more likely to increase local economic development than offering inducements to a few hand-picked firms.

ERA's member local governments should continue to bear down on their costs (for example, by sharing services and equipment, where it is economical to do so). There is no reason why local governments should not buy services from each other, particularly in activities which can be stored and manipulated electronically and transmitted over the internet, such as payroll, accounts and record keeping. By doing so, rates and other charges

More important are government initiatives helping firms to become established and profitable. There are a number of ways that ERA's Councils are already engaged in doing this – Eastside and other Business Enterprise Centres are providing vital training (particularly for the large number of home-based businesses in ERA) in how to run a business. People are also being assisted who are transiting out of the automotive industry and other declining parts of manufacturing to use their skills to set up new businesses in ERA, joining the ranks of a large number of successful, small and medium specialist manufacturing businesses in ERA.

Even more important is removing (or changing) regulations that hinder and restrain businesses (especially small businesses) from starting up and expanding. Some of the most successful businesses in ERA are surrounded by residential housing (often also containing home-based businesses). As small businesses in affluent countries like Australia move on from creating waste, smell, noise and transport congestion, to focus on clean, advanced manufacturing, professional and creative services, special shopping and

eating-out experiences, and so on, the need to separate business and residential uses of land becomes less. Indeed, vertical separation is being regarded as preferable near transit routes, in TODs, for example. One of the most effective methods for ERA to stimulate business activity is to get out of businesses' way.

Zoning is, therefore, a primary local government lever for supporting local economic development, as *The 30-Year Plan for Greater Adelaide* demonstrates with its call for height limits and permitted usages for buildings near transit corridors to be altered to permit more commercial development (particularly in so-called Transit Oriented Developments (TODs)). ERA could make a great deal more use of zoning to permit more valuable uses of land to emerge and to foster distinctive "senses of place" ("villages") to emerge across ERA. Sydney is seen as a series of villages, as are Paris and London. Unley has branded itself a City of Villages for a decade. ERA should preserve and enhance its distinctively different places for the extra liveability and economic underpinning that doing so provides. Local transport, infrastructure and recreation initiatives are also important in mobilising liveability and the economics of place.

Government initiatives helping firms to become established and profitable are also important. There are a number of ways that ERA's Councils are already engaged in doing this – Eastside and other Business Enterprise Centres are providing vital training (particularly for the large number of home-based businesses in ERA) in how to run a business. People are also being assisted by the BECs to use skills learned in declining parts of the manufacturing sector to set up small, specialist manufacturing businesses in ERA.

A valuable extension of the mandate of the BECs operating in ERA would be to provide a building to house them in each Council area that would act as a support space for small businesses, particularly in the creative industries. These buildings should provide entrepreneur/business "encounter" spaces (like an airport lounge, say), particularly for small businesses in ERA, as well as formal offices for temporary use, training spaces, even penthouse apartments for visitors. These buildings are intended as a "home" for the thousands of small and home businesses in ERA, which will provide much of the successful future economy of ERA.

At least as important for ERA's Councils is removing (or changing) regulations (red tape) that hinder and restrain businesses (especially small businesses) from starting up and expanding. ERA's Councils' own zoning regulations sometimes have the effect of preventing modest and warranted changes in land-use – like "pop-up" businesses, or fresh produce markets on spare Council land! ERA's Councils should push the zoning envelope to permit pilot uses and events that can be used to inform options for larger scale roll-outs of creative industries and businesses and activities that attract people who work in creative industries. Zoning changes should also be used more along transit corridors to enable businesses to relocate into better mixes that cut costs or increase demand.

Some of the most successful businesses in ERA are surrounded by residential housing (often also containing home-based businesses). As small businesses in affluent countries like Australia move increasingly to clean, advanced manufacturing, professional and creative services, special shopping and eating-out experiences, and so on, the need to separate business and residential uses of land becomes less. Indeed, vertical separation is being regarded the South Australian government as a preferred form of separation near transit routes – in TODs, for example. One of the most effective methods for ERA to stimulate business activity is to get out of businesses' way.

ERA is also perfectly placed to pursue an economic development strategy based on the provision of enjoyable experiences. This is what economic development strategy should be about in wealthy places like Adelaide's Eastern suburbs. The economic development aim should be to engender a locational sense of liveliness, opportunity and liveability – a place where valued experiences can be enjoyed by employees, residents and tourists alike and enjoying excellent electronic and physical accessibility. Local governments have a role to play to help provide pleasurable mixes of venues, businesses, art, music, entertainment, shops, cafes and streetscapes.

An important initiative in this respect that is discussed in the report is what is labelled the development of “creek tourism”, particularly in relation to the Torrens River and Linear Park. This suggestion is not new. *The 30 Year Plan for Greater Adelaide* in discussing Eastern Adelaide highlighted a proposal to “enhance the network of recreation trails and open space connected to the Hills Face Zone and River Torrens”. There are complex land ownership problems confronting this. A Linear Park Authority was proposed (and agreed to by the relevant Councils) to deal with this, but was ultimately vetoed by a State Government Department. This proposal needs to be pushed again as walking tourism is huge in many parts of the world and a walking trail from the sea to the Barossa mostly along the Torrens would be a major tourist attraction for Adelaide as well as ERA.

The Central Market is a success because it offers an exotic variety and abundance of foods in a confined space that is a pleasure to experience. People shop on The Parade in Norwood because it is enjoyable. Adelaide being voted the fifth best location in the world to live is important for Adelaide's economic development prospects. Much of the life that people look for to enjoy is to be found in small entrepreneurial efforts – in workshops, gardens, and streets – which are both creative and enjoyable. They are traditional back-street activities brought out into the open and encouraged.

Cities expert, Joel Kotkin, argues that the places most likely to thrive economically in the future are those places that offer the best quality of life and value for companies, individuals and industries. British geographer, Wilfred Burns, argues that local development should be based on the underlying premise of giving pleasure by maintaining variety in scene and uses and experiences. The ERA economy will grow faster and ERA's inhabitants will live more enjoyable lives if ERA can keep this idea at the front of its economic development strategy.

Within this broad emphasis on quality of life and value for companies, individuals and industries, four broad development themes have been identified in discussions with Councils' staff. These should form a focus for ERA's development initiatives, which does not mean that other development issues should not be addressed, but primary focus might be given to developing and supporting these:

- small business generally;
- creative industries;
- sport, recreation and tourism; and
- water.

Small business generally

South Australia does not seem well-suited to big businesses. Many have left or would leave if they were not subsidised. In the modern world, mass production and bureaucratic

organisation are gravitating naturally to the emerging economies, such as China, India, Indonesia, and so on.

By contrast, small businesses have strong prospects in advanced economies, like South Australia's, in a globalised world. The advanced countries have opportunities to specialise in the economics of variety, high value and service, tailored to individual preferences and desires, using electronic communications and computing.

ERA could aspire to become a “start-up” place in Adelaide – a great place to start a business, and a place to leave after a while if growth prospects for large businesses are better elsewhere.

It does not make sense for a local region like ERA to try to attract large businesses, because small businesses in Australia:

- are 96 per cent of all businesses,
- provide half of all private sector employment,
- are growing faster than large businesses,
- are increasing their (non-mining) exports faster than large (non-mining) businesses,
- are concentrated in services, which are growing fast,
- include a large number which operate from home, which is particularly attractive for older workers and women with children under 15,
- have survived in a declining manufacturing sector through innovative, unconventional and high-value products, and
- are about to be powerfully energised by the NBN.

This shift to small business is happening because the economically-advanced world has become sufficiently rich and well educated to enter the post-industrial era – a rejection of bigness, centralisation and bureaucracy, where people wish to count more as a person. “Small is beautiful” is the motto of this society. People in an affluent, attractive, region like ERA are quintessentially post-industrial.

Second, the increase in knowledge, communication and linkage resources available through the internet and broadband is strongly raising the competitiveness of small business. Soon there will be low-cost apps to help small businesses take business decisions that can match the quality of decisions taken by well-advised large businesses. The NBN will be highly valuable for small businesses, therefore.

Third, the globalisation of the world economy is expanding the market for specialist products and services produced by small businesses, wherever they may be located. Flaschengeist, in Glynde, for example, has 26 Australian outlets and is an international exporter (Europe, China, South Africa, New Zealand and the United States) of unique liqueurs, olive oils and vinegars.

The fourth reason why the shift to small business is happening is the advent of “long-tail” economics in the economically-advanced countries. Increasing affluence drives consumers towards a long tail of many highly-differentiated products and services, creating increasing opportunities for smaller, specialised producers. We don't just want a lot more of the same as we become richer; we want greater quality, variety and enjoyable experiences.

As noted earlier, policies and programs that ERA should commit to (and/or try to persuade higher levels of government to commit to) that can help small businesses to grow and prosper include:

- training people how to run a small business;
- lowering small businesses' costs;
- assisting small businesses to be more innovative; and
- encouraging small businesses to export.

ERA (and Councils who are members of ERA) already provide training courses for small businesses in various ways, including through the Eastside BEC. These efforts should be strengthened by encouraging higher levels of government to mount their own programs (and/or to provide more support for Local Government's efforts. Good online programs are available from Canada, the UK and the USA.

The most effective ways that ERA (and Councils who are members of ERA) can lower the costs of small business is by keeping business taxes low and keeping the costs of dealing with red tape low. As Mahalia Layzell of Mahalia Coffee in Robe said to me: "The Council has been very helpful to us. It leaves us alone. No-one hassles us. I am relaxed and able to be true to myself as an artist".

These efforts should be strengthened by encouraging higher levels of government to mount their own small business tax cuts and their own red tape reduction programs.

Innovation by small businesses is essentially a response to competitive pressures. ERA's Councils should not engage in "buy local" programs and should discourage higher levels of government from protectionism for politically-attractive enterprises as well. Such programs are paid for with higher costs (including higher taxes) for other, more competitive, local businesses. If a business can't compete at home, it is unlikely that it is going to take the rest of the world by storm.

Contact with foreign markets as an exporter stimulates innovation, because exporting requires modification of products or services to meet the different requirements of different markets. ERA should support export-support services aimed at small businesses at all levels of government, particularly locally. One possibility could be to negotiate with the Onkaparinga Exporters Club to form a branch in ERA, with a greater level of State and Commonwealth financial support for both branches.

Eastside BEC's database of business clients shows that there are even numbers of businesses headed by men and women and that about 90 per cent are home-based. This is typical of small business. One dwelling in ten, nationally, has a small business in it. Home-based businesses reduce traffic congestion at commuting times, help resolve work-life balance problems (for women, especially), and raise labour force participation rates for men approaching and after retirement.

ERA has many small consultancy businesses servicing clients across the metropolitan area and beyond. Rising costs in Adelaide's CBD, just across the Parklands, including parking and bus costs to commuters, are likely to see a strengthening of small consultancy, finance and insurance sectors along Greenhill and Fullarton Roads, with further expansion along Dequetteville Terrace, Main North Road, Prospect Road and North Terrace. The ERA Councils involved are rezoning for multi-storey apartments to meet SA 30-year Plan objectives, potentially with associated office or commercial

development on lower floors, raising height limits and providing for undercroft parking. This will raise the value produced from these main street frontages significantly.

Professional offices (including medical, dental and therapeutic services) are spreading along Kensington Road, The Parade, Unley Road, Walkerville Terrace, Prospect Road and near Modbury and Ashford Hospitals. Retirement villages and aged care homes are expanding in a number of locations, along with home maintenance and in-home care services for the aging population of ERA.

The South Australian Government has a preference for Tea Tree Gully to ally itself with the Northern Council areas of Adelaide, as shown by the close relationship between Modbury and Lyell McEwin Hospitals, and the water projects that Tea Tree Gully shares with Salisbury, in particular. ERA should see itself as a voluntary alliance of willing participants that can accommodate relationships between member Councils and outside bodies. ERA should be an alliance for broad, beneficial, local region policy, together with pioneering trials that can benefit all areas, not an exclusive club.

Eastside BEC is an important resource for business start-ups, operating out of Campbelltown Library (which also has excellent IT facilities that ERA's small businesses can use). Some clients have been people who are moving out of the down-sizing automotive sector, being assisted to set up in small advanced manufacturing businesses in non-auto sectors (plastics, for example).

Wayville Showgrounds in Unley is emerging as a significant focal point in the small business future of ERA. Major events are planned eventually to occur every fortnight, driving up demand for a mix of hotels, restaurants, professional offices and housing. Novel plans are in train to store water underground, connecting this development to the water prospects in other parts of ERA. Wayville Railway Station, next to the Showground, offers easy passenger access to the heart of the expanding Goodwood Precinct.

There are many iconic South Australian brands that either manufacture or have sales outlets in ERA: RM Williams in Percy Street, Prospect, Haigh's Chocolates in Unley, FruChocs in Glynde. Other well known brands in ERA include (among many that could be named) Patisserie Royale (Bakery), Casa del Formaggio (Cheese manufacture), Ciabatta Bakery, Rio Coffee, 1645 (Coffee) and Flaschengeist (liqueurs, olive oils and vinegars). ERA seems particularly well-suited to quality food manufacture and retail (exemplified, perhaps, by the Campbelltown Food Trail, which has driven this manufacturing opportunity into a tourism opportunity, as well. ERA is also home to a number of small, light manufacturing zones, although the trend is for such businesses to move to less expensive locations as land prices move up under the pressure of competition from other uses.

Retail trade and hotels, cafes and restaurants are important economic activities for small businesses in ERA. These enterprises have an important place in providing a sense of place to various locations in ERA: locational atmosphere, pleasure and enjoyment, thereby providing "external benefits" to other activities located in ERA.

Shopping centres and malls know this and try to choose a blend of activities that provide a pleasurable overall experience for visitors to draw them to make purchases in those places. ERA has a number of shopping Centres and Malls (Burnside Village, Tea Tree Plaza, Golden Grove and Modbury Regional Shopping Centres, together with some smaller malls in Unley, for example) as well as High Street Shopping strips (like The

Parade, King William Road, Unley Road, Prospect Road, Glen Osmond Road and an emerging Walkerville Terrace) that, combined with a mixture of street art and landscaping, also aim to provide pleasurable, overall experiences. Public access to the locations where these businesses are concentrated is a vital issue, of course. The Obahn terminus at Modbury is a major illustration of the reciprocal benefits of a concentration of shopping, eating and recreation facilities, with good access to car and public transport movement. Unley is trying to reinvent Unley Central with a better balance of day/night activities, for example a cinema complex.

While “externalities” are expected to be a positive for such locations, they can become negatives. For example, some mainstreet locations have recently experienced a number of shop closures, leaving empty spaces which create negative rather than positive sensations, thus reducing the willingness of potential shoppers at large to visit these areas. All business owners in these mainstreet locations have an incentive to act as a collective to try to see that such “negative feedback” situations do not emerge. ERA, through its Local Government members, should try to facilitate collective action by independent business owners in such locations to keep rents stable and low enough that mass vacancies do not appear.

The creative industries

A particular subset of small businesses has become known as “the creative industries”.

The creative industries are classified as including advertising and marketing, architecture, specialist design and photographic services, digital content, including publishing, broadcasting, web search portals and telecommunication, information media and telecommunications, software publishing and computer system design, activities associated with motion picture, video production and sound recording activities, radio and television broadcasting, sound recording and music publishing, creative and performing arts activities, including music and writing, jewellery manufacture, and all sorts of publishing services, including newspapers, periodicals, books, directories, and libraries and archives.

These businesses often provide productivity-enhancing solutions in, and transformative impacts on, mainstream, traditional, industries, which is why governments everywhere are interested in them. High band width, animation and imaging businesses, collaborating with software developers, for example, could help provide solutions in health and aged care, sport and recreation, building and construction, and so on.

The creative industries are emerging as economically significant in all advanced countries. According to a recent report in the UK, for example:

The UK's creative economy is one of its great national strengths, historically deeply rooted and accounting for around one-tenth of the whole economy. It provides jobs for 2.5 million people – more than in financial services, advanced manufacturing or construction – and in recent years, this creative workforce has grown four times faster than the workforce as a whole.²

² Bakhshi, Hasan, Ian Hargreaves and Juan Mateos-Garcia, *A Manifesto for the Creative Economy*, Nesta, London, April 2013.

According to a widely-cited 2009 report by the Centre for International Economics³:

Based on IBISWorld estimates, the industry gross product of the creative industries was around \$31.1 billion in 2007-08. This is a contribution to GDP of around 2.8 per cent, more than a number of traditional industries such as agriculture, communications and electricity, gas & water supply.

Over the three years to 2007-08, the creative industries grew at an average rate of 3.4 per cent in real terms, in line with the broader economy.

When viewed over a longer time period, the creative industries have grown at a significantly faster pace than the aggregate economy. Over the eleven years to 2007-08 the creative industries expanded at an average annual rate of 5.8 per cent, compared to average GDP growth of 3.6 per cent over that period.

According to the 2006 Census, there were around 288 000 people employed in the creative industries, or around 3.2 per cent of total employment. Based on more recent IBISWorld estimates, there were around 317 000 people employed in the creative industries in 2007-08.

According to the 2006 Census, there were around 278 000 people employed in creative occupations, around 3.1 per cent of total employment.

Using the creative trident approach increases the estimates of the creative workforce significantly to around 438 000, or 4.8 per cent of total employment.

Those employed in the creative industries tend to have higher incomes than average.

Productivity growth in the creative industries was around the same as the broader economy over the three years to 2007-08.

Australia is a net importer of creative content.

The more recent *Creative Economy Report Card*⁴ published by the ARC Centre for Excellence for Creative Industries and Innovation at the Queensland University of Technology, estimated that creative industries employment was 5.3 per cent of Australian employment in 2011, and had increased at the rate of 2.8 per cent p.a. between 2006 and 2011. This compared with growth in employment nationally over this period of 2.0 per cent p.a., in South Australia of 1.5 per cent p.a., and in the ERA region of 0.6 per cent p.a.

Drawing on both these analyses, if ERA could foster a significant creative industries sector, this could have a major upward impact on ERA's overall economic performance.

According to the *Creative Economy Report Card*:

³ Centre for International Economics, *Creative Industries Economic Analysis: 2009 Report and 2010 Update*, prepared for Enterprise Connect and the Creative Industries Innovation Centre at the University of Western Sydney, Centre for International Economics, Canberra and Sydney, July 2010, pp. 8-9.

⁴ www.cci.edu.au/Creative_Economy_report_card.pdf

The growth in creative industries employment is attributed largely to the digital revolution, and the rising demand for digital and design services across the whole economy.

Further, two thirds of creative industries employment is in *creative services* industries, growing by 4.5 per cent p.a., with the balance, in *cultural production* industries, which is growing only slowly.

Specialised design – graphic arts, consulting services, product design, fashion design – grew at 3.8%, photography grew at a notable 5.5 per cent per annum, software and IT grew at 5.6 per cent annually, while digital publishing grew at a remarkable cumulative rate of 14 per cent p.a.

The fastest growth in a *cultural production* industry was in film, with large increases in post-production and film production. Publishing shrank by 2.0 per cent p.a., most of the loss being in newspaper publishing, mainly in printing and areas ancillary to core journalism and editorial activities.

The fastest job growth of any occupational group was in (generally self-employed) creative artists, jumping 7.4 per cent p.a. between 2006 and 2011.⁵

Kent Town, in Norwood Payneham & St Peters, is the epicentre of a burgeoning, creative industries sector in ERA, together with the Glenside-based, Adelaide studios of the South Australian Film Corporation and the South Australian School of Art (Burnside), a creative industries centre at TAFE SA in Tea Tree Gully, the Arts domain at the Magill Campus of the University of South Australia in Campelltown (which generates a large share of Adelaide’s arts and design training activity), Charles Campbell College (also in Campelltown), specialising in the performing arts and trade training, and significant software development activity in Unley. Unley’s Main Street digital economic strategy (part of Unley’s “Find Your Everything” branding strategy) emphasises teleworking, home-based businesses, unique aspects of commerce in Unley, independent traders, and so on.

ERA has a solid base on which to build a strong creative industries sector, therefore. As the manager of Eastside BEC, says: “Creative people like the Eastern suburbs”.

Table 24, below, uses the ARC Centre for Excellence for Creative Industries and Innovation’s definition of creative industry sectors to measure employment in ERA’s creative industries in 2006 and 2011.

⁵ www.cci.edu.au/Creative_Economy_report_card.pdf

Table 24: The Eastern Region Alliance's Creative Industries Structure, 2006 and 2011, Employment by Industry

Creative Industry Sector	Year		
	2006 Pers.	2011 Pers.	Change Pers.
Advertising, Marketing, Architecture and Design	1676	1393	-283
Software and Digital Content	1438	1529	91
Film, TV and Radio	695	556	-139
Music, Visual and Performing Arts	361	388	27
Publishing	372	321	-51
Total	4542	4187	-355
Other Industries	82170	85334	3164
Total Employment	86712	89521	2809
	%	%	
Creative Industries as % of Total	5.2	4.7	-----

Source: ABS, special Census tabulation.

As noted earlier, the national share of creative industries jobs was 5.3 per cent in 2011 and was growing at 2.8 per cent p.a. ERA's share is about 10 per cent below the national share (but was above it in 2006) and fell between 2006 and 2011. ERA has good prospects in the creative industries, provided it can reverse the slide over the past few years, particularly in advertising, marketing, architecture and design, as well as in film, TV and radio. Employment in software and digital content increased, but not nearly as fast as nationally.

The Council in ERA with the most creative industries jobs is Norwood Payneham & St Peters (1346 jobs, 6.0 per cent of local jobs), followed by Unley (1084 jobs, also 6.0 per cent of local jobs) and Burnside (803 jobs, 5.5 per cent of local jobs). The LGA with the highest percentage of creative industries jobs is Prospect, however (9.0 per cent of local jobs). Campbelltown and Tea Tree Gully have fewer than 2 per cent of local jobs in the creative industries sector. Walkerville has a very small job market, but it appears to have lost 70 per cent of its creative industries jobs between 2006 and 2011, mostly in film, TV and radio. This seems likely to be due to the relocation of Channel 7.⁶

Apart from the general strategies for assisting the development of small businesses discussed earlier, there is a major Commonwealth agency, Enterprise Connect, which provides assistance to businesses in the creative industries. Enterprise Connect has a South Australian State Centre in Pirie Street. Enterprise Connect provides extensive and on-going business advice to businesses in the creative industries (with annual turnovers between \$1 million and \$100 million) through its Creative Industries Innovation Centre

⁶ More detailed data for each LGA within ERA are presented in Appendix 6, below.

(CIIC) at the University of Technology Sydney (UTS). For smaller businesses, Enterprise Connect provides a one hour free consultation through a service called Biztro.

ERA might approach the CIIC through the South Australian State Centre to investigate what programs might be able to be developed for ERA's groups of creative industries in various locations to complement CIIC's normal services to individual businesses.

Sport, recreation and tourism

An important sub-set of businesses in affluent, advanced economies is found in the sport, recreation and tourism sector. These businesses, and the areas that contain them, have high growth prospects, because affluent people are looking for experiences to enjoy as much as goods and services to buy. If enjoyable experiences can be combined with goods and services that people want to buy, as well, a synergy occurs which can provide rapid economic growth for the activities and people in the area. While an upgraded lifestyle for residents is the primary objective, heightened liveability enhances the attractiveness of the area to visitors from the rest of Adelaide and elsewhere. ERA could easily aim to become a "City of Villages", as Sydney sees itself, and as Unley has branded itself for a decade.

ERA is particularly well-endowed with opportunities in this sector, not only because of its relatively high rainfall on the Adelaide plain (which give it its creeks, tall trees and parks), but because of its mix of retail, food, quality manufacturing, urban landscapes, sporting venues, history and art (including street art), which make it appealing for people to visit and enjoy.

"Place activation" is a major strategy in most of the Councils in order to make their spaces more appealing and enjoyable. Prospect Road is funky. Life-sized plastic giraffes (and other animals), along with more cafe society, have been suggested for the laneways in Kent Town (a hot spot for the creative industries). The Regal Cinema is seen a needing recreational developments around it to make it the heart of an entertainment hub. Campbelltown has the idea of "Magill Village" at the intersection of Magill and St Bernard's Roads, building on the Magill Campus of UniSA and associated playing fields, retail, commercial, industrial and residential developments, its food trail, moonlight markets, creeks, Poets Corner, foothills, creeks and cycling options. Wayville Showgrounds offers Unley a major prospect for its Goodwood precinct. The many splendid open spaces, parks and reserves need closer access to cafes and restaurants to upgrade them recreationally.

Unsurprisingly, most of the Councils making up ERA have (at least implicitly) sport, recreation and/or tourism strategies of one sort or another. Burnside has a recreational strategy, including the development of a sporting hub at Glenunga. Walkerville is endeavouring to open up Walkerville Terrace to the Torrens River and Linear Park, with the "Watson" development, perhaps, leading the way to similar residential developments in close proximity to the Torrens. The new Woolworths shopping centre and the resulting stimulation of boutique shopping developments also have the effect of opening up Walkerville to the Torrens. Walkerville also plans to make more effective use of Walkerville Oval (perhaps though development of a sports hub).

Tea Tree Gully has an open space strategy, based around its many tree-lined creeks and parks, as well as its "Live-Life Modbury" strategy for its regional centre. Tea Tree Gully could use its plans in storm-water capture to set up more, or larger, wetlands and other

recreational options. Tea Tree Gully also has recreation and tourism options with its historic township of Tea Tree Gully.

Norwood and Unley are home to well-known major sporting grounds. Norwood Payneham & St Peters has the Torrens River and First, Second and Third Creeks. Campbelltown has the Torrens and Third, Fourth and Fifth Creeks. First Creek originates in Burnside as picturesque Waterfall Gully, of course. Unley has Brownhill Creek (after it has passed through Mitcham). These creeks and the River have the effect of opening up corridors through the built landscape, providing a pleasing urban streetscape, as well as a natural basis for the establishment of parks and large recreational areas. The Geoff Heath Par 3 golf course is built around Fourth Creek and backs onto the River in Campbelltown. Recreational use of these waterways and the surrounding land is strongly supported by the local communities.

A major lifestyle and tourism opportunity exists in further upgrading the Torrens River for lifestyle and tourism activity. ERA is fortunate in having Adelaide's main waterway flowing through it. The waterway has, of course, been developed as Adelaide's Linear Park. The Obahn uses the Linear Park as an unimpeded bus-way for commuters to Adelaide CBD from Modbury and points in-between. Access to Obahn stops is associated with parking areas making access to the River simple for visitors. There are many other access points to the Linear Park, as well.

“Creek tourism” – focussed especially on further upgrading the Torrens River, Linear Park, bikeway and walking trails – is an economic development prospect that ERA should explore. The Linear Park could be activated as an Aboriginal Dream Time walk and bike path from the sea to the Barossa Valley (requiring an extension of the bike path from Tea Tree Gully to the Barossa). Such trails are popular with tourists in many parts of the world. It would require more accommodation for walking and cycling tourists to be established, as well as more places for refreshments and more toilet facilities. Upgrading the Park itself with appropriate plantings, pest and weed reduction programs, and information boards would be required. Integrated bus and return walk or cycle options are a possibility, facilitated by one-way bicycle hire.

Water

Water is a profitable business in South Australia, dominated by State Government-owned SA Water. Local governments are also participants in South Australia's water industry, however. ERA has some strong sources of water, especially stormwater. ERA already has a significant project (with the Commonwealth Government) in its “Waterproofing the East” stormwater project. Tea Tree Gully is also involved with Salisbury and Playford in “Waterproofing Northern Adelaide” – another stormwater project.

As part of the “Waterproofing the East” project, stormwater caught in the Tea Tree Gully area will be stored in aquifers under ERA and will then be available for use throughout ERA. One option, following the technology developed in Salisbury, is to put the water in wetlands and settling ponds before it is stored in the underground aquifers. This recycled water could be the basis of a thriving business in ERA.

Unley is considering storing stormwater underground with a managed aquifer recharge scheme. A further option being considered is the establishment of an effluent treatment plant in Tea Tree Gully. Other options are worth exploring, including above-ground water storage in dams or disused pits, with reticulation using SA Water's pipe system, if access were permitted.

Appendix 1: Table Sources

Table 1

South Australian real Gross State Product (SA GSP) in 2006/7 and 2011/12 is taken from ABS, 5220.0, *Australian National Accounts: State Accounts, Table 5, Expenditure, Income and Industry Components of Gross State Product, South Australia, Chain volume measures and current prices*.

South Australia's Census-measured employment in the Census years of 2006 and 2011 is taken from ABS, 2003.0, *Time Series Profile, South Australia, State 4, Table T33*.

The Eastern Region Alliance's employment in the Census years of 2006 and 2011 is taken from special Census tabulations provided by the Information Consultancy Services of the ABS.

The employment of residents in the Eastern Region Alliance in the Census years of 2006 and 2011 is taken from ABS, 2003.0, *Time Series Profiles, Burnside 40700, Campbelltown 40910, Norwood Payneham St Peters 45290, Prospect 46510, Tea Tree Gully 47700, Unley 47980 and Walkerville 48260*.

ERA's real Gross Regional Product (GRP) is estimated by:

- obtaining *South Australia's* total factor income per person employed by each industry (in current prices) in the Census years 2006 and 2011 by dividing SA total value added by industry (ABS, 5220.0, *Australian National Accounts: State Accounts, Table 5, Expenditure, Income and Industry Components of Gross State Product, South Australia, Chain volume measures and current prices*) for 2006/7 and 2011/12 by SA employment by industry for those years (ABS, 2003.0, *Time Series Profile, South Australia, State 4, Table T33*);
- obtaining ERA's total factor income by industry (in current prices) in 2006 and 2011 by multiplying South Australia's total factor income per person employed by industry (in current prices) in 2006 and 2011 by employment by industry in ERA in those years (taken from the special Census tabulations provided by the Information Consultancy Services of the ABS);
- obtaining ERA's real Gross Regional Product (in chain volume measures) in 2006 and 2011 by summing ERA's total factor income by industry in each year (in current prices), increased by the ratio of Gross State Product in chain volume measures to total industry factor income.

ERA's real Gross Residents' Product (GResP) is estimated by:

- obtaining *South Australia's* total factor income per person employed by each industry (in current prices) in the Census years 2006 and 2011 by dividing SA total value added by industry (ABS, 5220.0, *Australian National Accounts: State Accounts, Table 5, Expenditure, Income and Industry Components of Gross State Product, South Australia, Chain volume measures and current prices*) for 2006/7 and 2011/12 by SA employment by industry for those years (ABS, 2003.0, *Time Series Profile, South Australia, State 4, Table T33*);
- obtaining ERA's residents' total factor income by industry (in current prices) in 2006 and 2011 by multiplying South Australia's total factor income per person employed by industry (in current prices) in 2006 and 2011 by employment of residents in ERA by industry in those years (taken from ABS, 2003.0, *Time Series Profiles, Burnside 40700, Campbelltown 40910, Norwood Payneham St Peters 45290, Prospect 46510, Tea Tree Gully 47700, Unley 47980 and Walkerville 48260*);

- obtaining ERA's real Gross Residents' Product (in chain volume measures) in 2006 and 2011 by summing ERA's residents' total factor income by industry in each year (in current prices), increased by the ratio of Gross State Product in chain volume measures to total industry factor income.

Tables 2a, 2b, 3a and 3b

ERA's total factor income by industry is estimated by:

- obtaining *South Australia's* total factor income per person employed by each industry (in current prices) in the Census years 2006 and 2011 by dividing SA total value added by industry (ABS, 5220.0, *Australian National Accounts: State Accounts, Table 5, Expenditure, Income and Industry Components of Gross State Product, South Australia, Chain volume measures and current prices*) for 2006/7 and 2011/12 by SA employment by industry for those years (ABS, 2003.0, *Time Series Profile, South Australia, State 4, Table T33*);
- obtaining ERA's total factor income by industry (in current prices) in 2006 and 2011 by multiplying South Australia's total factor income per person employed by industry (in current prices) in 2006 and 2011 by employment by industry in ERA in those years (taken from the special Census tabulations provided by the Information Consultancy Services of the ABS).

ERA's residents' total factor income by industry is estimated by:

- obtaining *South Australia's* total factor income per person employed by each industry (in current prices) in the Census years 2006 and 2011 by dividing SA total value added by industry (ABS, 5220.0, *Australian National Accounts: State Accounts, Table 5, Expenditure, Income and Industry Components of Gross State Product, South Australia, Chain volume measures and current prices*) for 2006/7 and 2011/12 by SA employment by industry for those years (ABS, 2003.0, *Time Series Profile, South Australia, State 4, Table T33*);
- obtaining ERA's residents' total factor income by industry (in current prices) in 2006 and 2011 by multiplying South Australia's total factor income per person employed by industry (in current prices) in 2006 and 2011 by employment of residents in ERA by industry in those years (taken from ABS, 2003.0, *Time Series Profiles, Burnside 40700, Campbelltown 40910, Norwood Payneham St Peters 45290, Prospect 46510, Tea Tree Gully 47700, Unley 47980 and Walkerville 48260*).

Tables 4a, 4b, 5a and 5b

ERA's employment by industry in 2006 and 2011 is taken from special Census tabulations from the Information Consultancy Services of the ABS.

The employment of residents in ERA in the Census years of 2006 and 2011 is taken from ABS, 2003.0, *Time Series Profiles, Burnside 40700, Campbelltown 40910, Norwood Payneham St Peters 45290, Prospect 46510, Tea Tree Gully 47700, Unley 47980 and Walkerville 48260*.

Tables 6 and 7

- ERA's productivity by industry is estimated in the Census years 2006 and 2011 by dividing SA total value added by industry (ABS, 5220.0, *Australian National Accounts: State Accounts, Table 5, Expenditure, Income and Industry Components of Gross State Product, South Australia, Chain volume measures and current prices*) for 2006/7 and 2011/12 by SA employment by industry for those years (ABS, 2003.0, *Time Series Profile, South Australia, State 4, Table T33*);

Tables 8 and 9

ERA's employment by the geographical origin (place of usual residence) of each worker and by the highest non-school qualification of each worker and by the industry of employment of each worker in 2006 and 2011 is taken from special Census tabulations provided by the Information Consultancy Services of the ABS.

Tables 10 and 11

ERA's employment by the geographical destination (place of work) of each worker and by the highest non-school qualification of each worker and by the industry of employment of each worker in 2006 and 2011 is taken from special Census tabulations provided by the Information Consultancy Services of the ABS.

Tables 12 – 23

These tables are based on calculations and assumptions as described in the text.

Table 24

ERA's employment in creative industries in 2006 and 2011 is taken from special Census tabulations provided by the Information Consultancy Services of the ABS.

Appendix 2: Commuting origins of workers in the Eastern Region Alliance by industry, 2006 and 2011.⁷

Table 2A: Commuting Origins of Workers in Agriculture, Forestry and Fishing, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA	170	157	-13	-7.6
North Adelaide	16	17	1	6.3
East Adelaide	8	16	8	100.0
South Adelaide	25	33	8	32.0
West Adelaide	12	9	-3	-25.0
CBD	0	3	3	n.a.
Other	6	10	4	66.7
All Origins	<u>237</u>	<u>245</u>	<u>8</u>	<u>3.4</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2B: Commuting Origins of Workers in Mining, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA	127	235	108	85.0
North Adelaide	35	71	36	102.9
East Adelaide	31	57	26	83.9
South Adelaide	54	101	47	87.0
West Adelaide	13	53	40	307.7
CBD	9	8	-1	-11.1
Other	25	48	23	92.0
All Origins	<u>294</u>	<u>573</u>	<u>279</u>	<u>94.9</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

⁷ As noted on p.17, above, six areas of origin have been identified:

1. The **Eastern Region Alliance** itself (LGAs of Burnside 40700, Campbelltown 40910, Norwood Payneham & St Peters 45290, Prospect 46510, Tea Tree Gully 47700, Unley 47980 and Walkerville 48260);
2. **North Adelaide** (LGAs of Port Adelaide Enfield 45890, Salisbury 47140, Playford 45680, Gawler 42030, Mallala 43920, Light 43650 and Barossa 40310);
3. **East Adelaide** (LGAs of Adelaide Hills 40120, and Mount Barker 44550);
4. **South Adelaide** (LGAs of Mitcham 44340, Marion 44060, Holdfast Bay 42600, Onkaparinga 45340, Alexandrina 40220, Yankalilla 48750, and Victor Harbor 48050);
5. **West Adelaide** (LGAs of West Torrens 48410 and Charles Sturt 41060);
6. **Other** (Adelaide LGA 40070 and all the other people who worked in the Eastern Regional Alliance at the Census date).

Table 2C: Commuting Origins of Workers in Manufacturing, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	2786	2325	-461	-16.5
North Adelaide	1236	995	-241	-19.5
East Adelaide	248	228	-20	-8.1
South Adelaide	690	611	-79	-11.4
West Adelaide	359	343	-16	-4.5
CBD	49	39	-10	-20.4
Other	50	33	-17	-34.0
All Origins	<u>5418</u>	<u>4574</u>	<u>-844</u>	<u>-15.6</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2D: Commuting Origins of Workers in Electricity, Gas and Water Supply, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	308	266	-42	-13.6
North Adelaide	152	187	35	23.0
East Adelaide	30	35	5	16.7
South Adelaide	186	156	-30	-16.1
West Adelaide	91	83	-8	-8.8
CBD	17	6	-11	-64.7
Other	10	7	-3	-30.0
All Origins	<u>794</u>	<u>740</u>	<u>-54</u>	<u>-6.8</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2E: Commuting Origins of Workers in Construction, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	2931	3355	424	14.5
North Adelaide	686	926	240	35.0
East Adelaide	190	269	79	41.6
South Adelaide	611	873	262	42.9
West Adelaide	279	376	97	34.8
CBD	34	38	4	11.8
Other	36	76	40	111.1
All Origins	<u>4767</u>	<u>5913</u>	<u>1146</u>	<u>24.0</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2F: Commuting Origins of Workers in Wholesale Trade, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	1618	1472	-146	-9.0
North Adelaide	428	403	-25	-5.8
East Adelaide	154	109	-45	-29.2
South Adelaide	471	410	-61	-13.0
West Adelaide	239	202	-37	-15.5
CBD	33	32	-1	-3.0
Other	17	16	-1	-5.9
All Origins	<u>2960</u>	<u>2644</u>	<u>-316</u>	<u>-10.7</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2G: Commuting Origins of Workers in Retail Trade, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	7970	7702	-268	-3.4
North Adelaide	2702	2945	243	9.0
East Adelaide	491	497	6	1.2
South Adelaide	1568	1446	-122	-7.8
West Adelaide	764	790	26	3.4
CBD	127	152	25	19.7
Other	70	56	-14	-20.0
All Origins	<u>13692</u>	<u>13588</u>	<u>-104</u>	<u>-0.8</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2H: Commuting Origins of Workers in Accommodation, Cafes and Restaurant: Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	3436	3589	153	4.5
North Adelaide	986	1157	171	17.3
East Adelaide	176	169	-7	-4.0
South Adelaide	677	660	-17	-2.5
West Adelaide	334	413	79	23.7
CBD	67	89	22	32.8
Other	27	30	3	11.1
All Origins	<u>5703</u>	<u>6107</u>	<u>404</u>	<u>7.1</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2I: Commuting Origins of Workers in Transport and Storage, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	972	864	-108	-11.1
North Adelaide	354	402	48	13.6
East Adelaide	52	51	-1	-1.9
South Adelaide	177	127	-50	-28.2
West Adelaide	85	85	0	0.0
CBD	14	3	-11	-78.6
Other	16	17	1	6.3
All Origins	<u>1670</u>	<u>1549</u>	<u>-121</u>	<u>-7.2</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2J: Commuting Origins of Workers in Communication Services, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	779	684	-95	-12.2
North Adelaide	218	213	-5	-2.3
East Adelaide	74	85	11	14.9
South Adelaide	298	240	-58	-19.5
West Adelaide	167	155	-12	-7.2
CBD	47	34	-13	-27.7
Other	19	8	-11	-57.9
All Origins	<u>1602</u>	<u>1419</u>	<u>-183</u>	<u>-11.4</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2K: Commuting Origins of Workers in Finance and Insurance, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	1765	1542	-223	-12.6
North Adelaide	490	480	-10	-2.0
East Adelaide	190	161	-29	-15.3
South Adelaide	729	685	-44	-6.0
West Adelaide	296	296	0	0.0
CBD	44	29	-15	-34.1
Other	15	24	9	60.0
All Origins	<u>3529</u>	<u>3217</u>	<u>-312</u>	<u>-8.8</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2L: Commuting Origins of Workers in Property and Business Services, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	7160	7108	-52	-0.7
North Adelaide	1698	1871	173	10.2
East Adelaide	623	614	-9	-1.4
South Adelaide	2448	2431	-17	-0.7
West Adelaide	1045	1183	138	13.2
CBD	256	184	-72	-28.1
Other	101	132	31	30.7
All Origins	<u>13331</u>	<u>13523</u>	<u>192</u>	<u>1.4</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2M: Commuting Origins of Workers in Government Administration and Defence Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	1523	1437	-86	-5.6
North Adelaide	645	743	98	15.2
East Adelaide	218	228	10	4.6
South Adelaide	679	616	-63	-9.3
West Adelaide	330	303	-27	-8.2
CBD	47	29	-18	-38.3
Other	29	26	-3	-10.3
All Origins	<u>3471</u>	<u>3382</u>	<u>-89</u>	<u>-2.6</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2N: Commuting Origins of Workers in Education, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	4934	5155	221	4.5
North Adelaide	1006	1176	170	16.9
East Adelaide	527	546	19	3.6
South Adelaide	1237	1306	69	5.6
West Adelaide	576	627	51	8.9
CBD	93	129	36	38.7
Other	25	46	21	84.0
All Origins	<u>8398</u>	<u>8985</u>	<u>587</u>	<u>7.0</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2O: Commuting Origins of Workers in Health and Community Services, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA	7150	7661	511	7.1
North Adelaide	2708	3458	750	27.7
East Adelaide	818	835	17	2.1
South Adelaide	2654	2911	257	9.7
West Adelaide	1059	1326	267	25.2
CBD	196	235	39	19.9
Other	90	110	20	22.2
All Origins	<u>14675</u>	<u>16536</u>	<u>1861</u>	<u>12.7</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2P: Commuting Origins of Workers in Cultural and Recreational Services Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA	560	604	44	7.9
North Adelaide	138	140	2	1.4
East Adelaide	37	50	13	35.1
South Adelaide	117	139	22	18.8
West Adelaide	56	73	17	30.4
CBD	7	10	3	42.9
Other	4	12	8	200.0
All Origins	<u>919</u>	<u>1028</u>	<u>109</u>	<u>11.9</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 2Q: Commuting Origins of Workers in Personal and Other Services, Eastern Region Alliance, 2006 and 2011, persons*

Worker Origin	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA	2392	2399	7	0.3
North Adelaide	754	878	124	16.4
East Adelaide	213	217	4	1.9
South Adelaide	681	750	69	10.1
West Adelaide	360	349	-11	-3.1
CBD	42	52	10	23.8
Other	24	38	14	58.3
All Origins	<u>4466</u>	<u>4683</u>	<u>217</u>	<u>4.9</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation

**Table 2R: Commuting Origins of Workers in Not Classifiable Economic Units,
Eastern Region Alliance, 2006 and 2011, persons**

Worker Origin	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA	494	464	-30	-6.1
North Adelaide	90	111	21	23.3
East Adelaide	28	35	7	25.0
South Adelaide	100	121	21	21.0
West Adelaide	57	59	2	3.5
CBD	8	8	0	0.0
Other	9	17	8	88.9
All Origins	<u>786</u>	<u>815</u>	<u>29</u>	<u>3.7</u>

Source: ABS, special Census tabulation

Appendix 3: Commuting origins of workers in the Eastern Region Alliance by educational qualifications, 2006 and 2011.

Table 3A: Qualifications of Workers from the Eastern Region Alliance, 2006 and 2011, persons

Qualification	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
Post Graduate	2940	3693	753	25.6
Degree/Diploma	13848	15206	1358	9.8
Certificate	8460	8451	-9	-0.1
None	21827	19669	-2158	-9.9
All qualifications	<u>47075</u>	<u>47019</u>	<u>-56</u>	<u>-0.1</u>

Source: ABS, special Census tabulation.

Table 3B: Qualifications of Workers from North Adelaide, 2006 and 2011, persons

Qualification	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
Post Graduate	411	745	334	81.3
Degree/Diploma	2922	3997	1075	36.8
Certificate	3417	3992	575	16.8
None	7592	7439	-153	-2.0
All qualifications	<u>14342</u>	<u>16173</u>	<u>1831</u>	<u>12.8</u>

Source: ABS, special Census tabulation.

Table 3C: Qualifications of Workers from East Adelaide, 2006 and 2011, persons

Qualification	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
Post Graduate	359	404	45	12.5
Degree/Diploma	1453	1606	153	10.5
Certificate	781	842	61	7.8
None	1515	1350	-165	-10.9
All qualifications	<u>4108</u>	<u>4202</u>	<u>94</u>	<u>2.3</u>

Source: ABS, special Census tabulation.

Table 3D: Qualifications of Workers from South Adelaide, 2006 and 2011, persons

Qualification	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
Post Graduate	891	1121	230	25.8
Degree/Diploma	4369	4805	436	10.0
Certificate	2680	2822	142	5.3
None	5462	4868	-594	-10.9
All qualifications	<u>13402</u>	<u>13616</u>	<u>214</u>	<u>1.6</u>

Source: ABS, special Census tabulation.

Table 3E: Qualifications of Workers from West Adelaide, 2006 and 2011, persons

Qualification	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
Post Graduate	347	574	227	65.4
Degree/Diploma	1973	2444	471	23.9
Certificate	1236	1272	36	2.9
None	2566	2435	-131	-5.1
All qualifications	<u>6122</u>	<u>6725</u>	<u>603</u>	<u>9.8</u>

Source: ABS, special Census tabulation.

Table 3F: Qualifications of Workers from Adelaide CBD, 2006 and 2011, persons

Qualification	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
Post Graduate	113	149	36	31.9
Degree/Diploma	493	497	4	0.8
Certificate	100	124	24	24.0
None	384	310	-74	-19.3
All qualifications	<u>1090</u>	<u>1080</u>	<u>-10</u>	<u>-0.9</u>

Source: ABS, special Census tabulation.

**Table 3G: Qualifications of Workers from elsewhere,
2006 and 2011, persons**

Qualification	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
Post Graduate	42	52	10	23.8
Degree/Diploma	167	209	42	25.1
Certificate	112	167	55	49.1
None	252	278	26	10.3
All qualifications	<u>573</u>	<u>706</u>	<u>133</u>	<u>23.2</u>

Source: ABS, special Census tabulation.

Appendix 4: Commuting destinations of workers from the Eastern Region Alliance by industry, 2006 and 2011.⁸

Table 4A: Commuting Destinations of Workers from the Eastern Region Alliance in Agriculture, Forestry and Fishing, 2006 and 2011, persons*

Worker Origin	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA	170	157	-13	-7.6
North Adelaide	16	17	1	6.3
East Adelaide	8	16	8	100.0
South Adelaide	25	33	8	32.0
West Adelaide	12	9	-3	-25.0
CBD	0	3	3	n.a.
Other	6	10	4	66.7
All Origins	<u>237</u>	<u>245</u>	<u>8</u>	<u>3.4</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4B: Commuting Destinations of Workers from the Eastern Region Alliance in Mining, 2006 and 2011, persons*

Worker Origin	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA	127	235	108	85.0
North Adelaide	35	71	36	102.9
East Adelaide	31	57	26	83.9
South Adelaide	54	101	47	87.0
West Adelaide	13	53	40	307.7
CBD	9	8	-1	-11.1
Other	25	48	23	92.0
All Origins	<u>294</u>	<u>573</u>	<u>279</u>	<u>94.9</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

⁸ As noted on p.18, above, six areas of destination have been identified:

1. The **Eastern Region Alliance** itself (LGAs of Burnside 40700, Campbelltown 40910, Norwood Payneham & St Peters 45290, Prospect 46510, Tea Tree Gully 47700, Unley 47980 and Walkerville 48260);
2. **North Adelaide** (LGAs of Port Adelaide Enfield 45890, Salisbury 47140, Playford 45680, Gawler 42030, Mallala 43920, Light 43650 and Barossa 40310);
3. **East Adelaide** (LGAs of Adelaide Hills 40120, and Mount Barker 44550);
4. **South Adelaide** (LGAs of Mitcham 44340, Marion 44060, Holdfast Bay 42600, Onkaparinga 45340, Alexandrina 40220, Yankalilla 48750, and Victor Harbor 48050);
5. **West Adelaide** (LGAs of West Torrens 48410 and Charles Sturt 41060);
6. **Other** (Adelaide LGA 40070 and all the other people who worked in the Eastern Regional Alliance at the Census date).

Table 4C: Commuting Destinations of Workers from the Eastern Region Alliance in Manufacturing, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	2786	2325	-461	-16.5
North Adelaide	1236	995	-241	-19.5
East Adelaide	248	228	-20	-8.1
South Adelaide	690	611	-79	-11.4
West Adelaide	359	343	-16	-4.5
CBD	49	39	-10	-20.4
Other	50	33	-17	-34.0
All Origins	<u>5418</u>	<u>4574</u>	<u>-844</u>	<u>-15.6</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4D: Commuting Destinations of Workers from the Eastern Region Alliance in Electricity, Gas and Water Supply, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	308	266	-42	-13.6
North Adelaide	152	187	35	23.0
East Adelaide	30	35	5	16.7
South Adelaide	186	156	-30	-16.1
West Adelaide	91	83	-8	-8.8
CBD	17	6	-11	-64.7
Other	10	7	-3	-30.0
All Origins	<u>794</u>	<u>740</u>	<u>-54</u>	<u>-6.8</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4E: Commuting Destinations of Workers from the Eastern Region Alliance in Construction, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	2931	3355	424	14.5
North Adelaide	686	926	240	35.0
East Adelaide	190	269	79	41.6
South Adelaide	611	873	262	42.9
West Adelaide	279	376	97	34.8
CBD	34	38	4	11.8
Other	36	76	40	111.1
All Origins	<u>4767</u>	<u>5913</u>	<u>1146</u>	<u>24.0</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4F: Commuting Destinations of Workers from the Eastern Region Alliance in Wholesale Trade, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	1618	1472	-146	-9.0
North Adelaide	428	403	-25	-5.8
East Adelaide	154	109	-45	-29.2
South Adelaide	471	410	-61	-13.0
West Adelaide	239	202	-37	-15.5
CBD	33	32	-1	-3.0
Other	17	16	-1	-5.9
All Origins	<u>2960</u>	<u>2644</u>	<u>-316</u>	<u>-10.7</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4G: Commuting Destinations of Workers from the Eastern Region Alliance in Retail Trade, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	7970	7702	-268	-3.4
North Adelaide	2702	2945	243	9.0
East Adelaide	491	497	6	1.2
South Adelaide	1568	1446	-122	-7.8
West Adelaide	764	790	26	3.4
CBD	127	152	25	19.7
Other	70	56	-14	-20.0
All Origins	<u>13692</u>	<u>13588</u>	<u>-104</u>	<u>-0.8</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4H: Commuting Destinations of Workers from the Eastern Region Alliance in Accommodation, Cafes and Restaurants, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	3436	3589	153	4.5
North Adelaide	986	1157	171	17.3
East Adelaide	176	169	-7	-4.0
South Adelaide	677	660	-17	-2.5
West Adelaide	334	413	79	23.7
CBD	67	89	22	32.8
Other	27	30	3	11.1
All Origins	<u>5703</u>	<u>6107</u>	<u>404</u>	<u>7.1</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4I: Commuting Destinations of Workers from the Eastern Region Alliance in Transport and Storage, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	972	864	-108	-11.1
North Adelaide	354	402	48	13.6
East Adelaide	52	51	-1	-1.9
South Adelaide	177	127	-50	-28.2
West Adelaide	85	85	0	0.0
CBD	14	3	-11	-78.6
Other	16	17	1	6.3
All Origins	<u>1670</u>	<u>1549</u>	<u>-121</u>	<u>-7.2</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4J: Commuting Destinations of Workers from the Eastern Region Alliance in Communication Services, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	779	684	-95	-12.2
North Adelaide	218	213	-5	-2.3
East Adelaide	74	85	11	14.9
South Adelaide	298	240	-58	-19.5
West Adelaide	167	155	-12	-7.2
CBD	47	34	-13	-27.7
Other	19	8	-11	-57.9
All Origins	<u>1602</u>	<u>1419</u>	<u>-183</u>	<u>-11.4</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4K: Commuting Destinations of Workers from the Eastern Region Alliance in Finance and Insurance, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	1765	1542	-223	-12.6
North Adelaide	490	480	-10	-2.0
East Adelaide	190	161	-29	-15.3
South Adelaide	729	685	-44	-6.0
West Adelaide	296	296	0	0.0
CBD	44	29	-15	-34.1
Other	15	24	9	60.0
All Origins	<u>3529</u>	<u>3217</u>	<u>-312</u>	<u>-8.8</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4L: Commuting Destinations of Workers from the Eastern Region Alliance in Property and Business Services, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	7160	7108	-52	-0.7
North Adelaide	1698	1871	173	10.2
East Adelaide	623	614	-9	-1.4
South Adelaide	2448	2431	-17	-0.7
West Adelaide	1045	1183	138	13.2
CBD	256	184	-72	-28.1
Other	101	132	31	30.7
All Origins	<u>13331</u>	<u>13523</u>	<u>192</u>	<u>1.4</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4M: Commuting Destinations of Workers from the Eastern Region Alliance in Government Administration and Defence, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	1523	1437	-86	-5.6
North Adelaide	645	743	98	15.2
East Adelaide	218	228	10	4.6
South Adelaide	679	616	-63	-9.3
West Adelaide	330	303	-27	-8.2
CBD	47	29	-18	-38.3
Other	29	26	-3	-10.3
All Origins	<u>3471</u>	<u>3382</u>	<u>-89</u>	<u>-2.6</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4N: Commuting Destinations of Workers from the Eastern Region Alliance in Education, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	4934	5155	221	4.5
North Adelaide	1006	1176	170	16.9
East Adelaide	527	546	19	3.6
South Adelaide	1237	1306	69	5.6
West Adelaide	576	627	51	8.9
CBD	93	129	36	38.7
Other	25	46	21	84.0
All Origins	<u>8398</u>	<u>8985</u>	<u>587</u>	<u>7.0</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4O: Commuting Destinations of Workers from the Eastern Region Alliance in Health and Community Services, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	7150	7661	511	7.1
North Adelaide	2708	3458	750	27.7
East Adelaide	818	835	17	2.1
South Adelaide	2654	2911	257	9.7
West Adelaide	1059	1326	267	25.2
CBD	196	235	39	19.9
Other	90	110	20	22.2
All Origins	<u>14675</u>	<u>16536</u>	<u>1861</u>	<u>12.7</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4P: Commuting Destinations of Workers from the Eastern Region Alliance in Cultural and Recreational Services, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	560	604	44	7.9
North Adelaide	138	140	2	1.4
East Adelaide	37	50	13	35.1
South Adelaide	117	139	22	18.8
West Adelaide	56	73	17	30.4
CBD	7	10	3	42.9
Other	4	12	8	200.0
All Origins	<u>919</u>	<u>1028</u>	<u>109</u>	<u>11.9</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation.

Table 4Q: Commuting Destinations of Workers from the Eastern Region Alliance in Personal and Other Services, 2006 and 2011, persons*

Worker Origin	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
ERA	2392	2399	7	0.3
North Adelaide	754	878	124	16.4
East Adelaide	213	217	4	1.9
South Adelaide	681	750	69	10.1
West Adelaide	360	349	-11	-3.1
CBD	42	52	10	23.8
Other	24	38	14	58.3
All Origins	<u>4466</u>	<u>4683</u>	<u>217</u>	<u>4.9</u>

*Excludes proportionate share of workers in non-classifiable economic units.
Source: ABS, special Census tabulation

**Table 4R: Commuting Destinations of Workers from the Eastern Region Alliance
in Not Classifiable Economic Units, 2006 and 2011, persons**

Worker Origin	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
ERA	494	464	-30	-6.1
North Adelaide	90	111	21	23.3
East Adelaide	28	35	7	25.0
South Adelaide	100	121	21	21.0
West Adelaide	57	59	2	3.5
CBD	8	8	0	0.0
Other	9	17	8	88.9
All Origins	<u>786</u>	<u>815</u>	<u>29</u>	<u>3.7</u>

Source: ABS, special Census tabulation

Appendix 5: Commuting destinations of workers from the Eastern Region Alliance by educational qualifications, 2006 and 2011.

Table 5A: Qualifications of Workers from the Eastern Region Alliance, working in the Eastern Regional Alliance, 2006 and 2011, persons*

Qualification	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
Post Graduate	2939	3692	753	26.5
Degree/Diploma	13848	15206	1358	9.8
Certificate	8461	8451	-10	-0.1
None	21826	19668	-2158	-9.9
All qualifications	<u>47074</u>	<u>47017</u>	<u>-57</u>	<u>-0.1</u>

* It is not clear why the numbers in this Table differ fractionally from the numbers in Table 3A, above.
Source: ABS, special Census tabulation.

Table 5B: Qualifications of Workers from the Eastern Region Alliance, working in North Adelaide, 2006 and 2011, persons

Qualification	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
Post Graduate	1593	2088	495	31.1
Degree/Diploma	6743	7329	586	8.7
Certificate	5652	5687	35	0.1
None	10686	9320	-1366	-12.8
All qualifications	<u>24674</u>	<u>24424</u>	<u>-250</u>	<u>-1.0</u>

Source: ABS, special Census tabulation.

Table 5C: Qualifications of Workers from the Eastern Region Alliance, working in East Adelaide, 2006 and 2011, persons

Qualification	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
Post Graduate	92	110	18	19.6
Degree/Diploma	374	436	62	16.6
Certificate	167	192	25	15.0
None	398	344	-54	-13.6
All qualifications	<u>1031</u>	<u>1082</u>	<u>51</u>	<u>4.9</u>

Source: ABS, special Census tabulation.

Table 5D: Qualifications of Workers from the Eastern Region Alliance, working in South Adelaide, 2006 and 2011, persons

Qualification	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
Post Graduate	825	987	162	19.6
Degree/Diploma	2273	2492	219	9.6
Certificate	927	886	-41	-4.4
None	2001	1687	-314	-15.7
All qualifications	<u>6026</u>	<u>6052</u>	<u>-26</u>	<u>-0.4</u>

Source: ABS, special Census tabulation.

Table 5E: Qualifications of Workers from the Eastern Region Alliance, working in West Adelaide, 2006 and 2011, persons

Qualification	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
Post Graduate	843	1051	208	24.7
Degree/Diploma	3634	3962	328	9.0
Certificate	2865	2688	-177	-6.2
None	5467	4583	-884	-16.2
All qualifications	<u>12809</u>	<u>12284</u>	<u>-525</u>	<u>-4.1</u>

Source: ABS, special Census tabulation.

Table 5F: Qualifications of Workers from the Eastern Region Alliance, working in Adelaide CBD, 2006 and 2011, persons

Qualification	Year		Diff.	%
	2006	2011		
	<u>pers</u>	<u>pers</u>	<u>pers</u>	<u>inc</u>
Post Graduate	3981	5399	1418	35.6
Degree/Diploma	13419	15471	2052	15.3
Certificate	4143	4115	-28	0.6
None	11843	10347	-1496	-12.6
All qualifications	<u>33386</u>	<u>35342</u>	<u>1956</u>	<u>5.9</u>

Source: ABS, special Census tabulation.

**Table 5G: Qualifications of Workers from the Eastern Region Alliance,
working elsewhere, 2006 and 2011, persons**

Qualification	Year		Diff. <u>pers</u>	% <u>inc</u>
	2006 <u>pers</u>	2011 <u>pers</u>		
Post Graduate	469	813	344	73.3
Degree/Diploma	2529	3408	879	34.8
Certificate	3295	3875	580	17.6
None	6580	6730	150	2.3
All qualifications	<u>12873</u>	<u>14826</u>	<u>1953</u>	<u>15.2</u>

Source: ABS, special Census tabulation.

Appendix 6: The “creative industries” in the Eastern Region Alliance, 2006 and 2011

Table 6A: Burnside’s Creative Industries Structure, 2006 and 2011, Employment by Industry

Creative Industry Sector	Year		
	2006 Pers.	2011 Pers.	Change Pers.
Advertising, Marketing, Architecture and Design	284	226	-58
Software and Digital Content	468	447	-21
Film, TV and Radio	25	15	-10
Music, Visual and Performing Arts	77	76	-1
Publishing	56	39	-17
Total	910	803	-107
Other Industries	13364	13826	462
Total Employment	14274	14629	355
	%	%	
Creative Industries as % of Total	6.4	5.5	-----

Source: ABS, Special Census Tabulation.

Table 6B: Campbelltown’s Creative Industries Structure, 2006 and 2011, Employment by Industry

Creative Industry Sector	Year		
	2006 Pers.	2011 Pers.	Change Pers.
Advertising, Marketing, Architecture and Design	82	67	-15
Software and Digital Content	38	55	17
Film, TV and Radio	11	3	-8
Music, Visual and Performing Arts	26	22	-4
Publishing	17	13	-4
Total	174	160	-14
Other Industries	8033	8726	693
Total Employment	8207	8886	679
	%	%	
Creative Industries as % of Total	2.1	1.8	-----

Source: ABS, Special Census Tabulation.

Table 6C: Norwood Payneham & St Peters' Creative Industries Structure, 2006 and 2011, Employment by Industry

	Year		
	2006 Pers.	2011 Pers.	Change Pers.
Creative Industry Sector			
Advertising, Marketing, Architecture and Design	732	656	-76
Software and Digital Content	297	368	71
Film, TV and Radio	108	88	-20
Music, Visual and Performing Arts	106	123	17
Publishing	128	111	-17
Total	1371	1346	-25
Other Industries	19565	21067	1502
Total Employment	20936	22413	1477
	%	%	
Creative Industries as % of Total	2.1	1.8	-----

Source: ABS, Special Census Tabulation.

Table 6D: Prospect's Creative Industries Structure, 2006 and 2011, Employment by Industry

	Year		
	2006 Pers.	2011 Pers.	Change Pers.
Creative Industry Sector			
Advertising, Marketing, Architecture and Design	81	65	-16
Software and Digital Content	38	45	7
Film, TV and Radio	325	319	-6
Music, Visual and Performing Arts	18	27	9
Publishing	10	10	0
Total	472	466	-6
Other Industries	4314	4733	419
Total Employment	4786	5199	413
	%	%	
Creative Industries as % of Total	9.9	9.0	-----

Source: ABS, Special Census Tabulation.

Table 6E: Tea Tree Gully' Creative Industries Structure, 2006 and 2011, Employment by Industry

Creative Industry Sector	Year		Change Pers.
	2006 Pers.	2011 Pers.	
Advertising, Marketing, Architecture and Design	94	105	11
Software and Digital Content	72	89	17
Film, TV and Radio	6	6	0
Music, Visual and Performing Arts	31	40	9
Publishing	40	33	-7
Total	243	273	30
Other Industries	17900	18111	211
Total Employment	18143	18384	241
	%	%	
Creative Industries as % of Total	1.3	1.5	-----

Source: ABS, Special Census Tabulation.

Table 6F: Unley's Creative Industries Structure, 2006 and 2011, Employment by Industry

Creative Industry Sector	Year		Change Pers.
	2006 Pers.	2011 Pers.	
Advertising, Marketing, Architecture and Design	385	265	-120
Software and Digital Content	483	503	20
Film, TV and Radio	115	125	10
Music, Visual and Performing Arts	91	85	-6
Publishing	114	106	-8
Total	1188	1084	-104
Other Industries	15161	15966	805
Total Employment	16349	17050	701
	%	%	
Creative Industries as % of Total	6.8	6.0	-----

Source: ABS, Special Census Tabulation.

Table 6F: Walkerville's Creative Industries Structure, 2006 and 2011, Employment by Industry

Creative Industry Sector	Year		
	2006 Pers.	2011 Pers.	Change Pers.
Advertising, Marketing, Architecture and Design	18	9	-9
Software and Digital Content	42	22	-20
Film, TV and Radio	105	0	-105
Music, Visual and Performing Arts	12	15	3
Publishing	7	9	2
Total	184	55	-129
Other Industries	2645	1821	-824
Total Employment	2829	1876	-953
	%	%	
Creative Industries as % of Total	6.5	2.9	-----

Source: ABS, Special Census Tabulation

Appendix 7: Concordance between the ABS industry classification used in this report and the latest ABS industry classification

ABS industry classification used in this report	Latest ABS industry classification
Agriculture, Forestry and Fishing	Agriculture, Forestry and Fishing
Mining	Mining
Manufacturing	Manufacturing
Electricity, Gas and Water Supply	Electricity, Gas, Water and Waste Services
Construction	Construction
Wholesale Trade	Wholesale Trade
Retail Trade	Retail Trade
Accommodation, Cafes and Restaurants	Accommodation and Food Services
Transport and Storage	Transport, Postal and Warehousing
Communication Services	Information Media and Telecommunications
Finance and Insurance	Financial and Insurance Services
Property and Business Services	Rental, Hiring and Real Estate Services; Professional, Scientific and Technical Services; and Administrative and Support Services
Government Administration and Defence	Public Administration and Safety
Education	Education and Training
Health and Community Services	Health Care and Social Assistance
Cultural and Recreational Services	Arts and Recreation Services
Personal and Other Services	Other Services