# Measuring the Australian Night Time Economy 2021-22

*A project for the Council of Capital City Lord Mayors*

October 2023

Ingenium Research

## About the data used in this report

The Council of Capital City Lord Mayors (CCCLM) have been commissioning annual analysis to measure the size of the Australian Night Time Economy (NTE) since 2012, with data available since 2009. The NTE is defined as economic activity occurring between 6pm and 6am and is split into Core, Non-Core and Supply sectors. Historically, our annual reports have focussed on the Core NTE, which comprises Food, Drink and Leisure & Entertainment (consumption) businesses. This year, however, we have expanded our remit to also include retail (both grocery and non-grocery) and accommodation (a sub-set of the Non-Core NTE), in addition to the Core NTE, to reflect the growing appreciation of the diversity of NTE activities within Australian cities.

This report provides details economic performance data for the latest financial year for which official data is available (2021-22). For the first time, the report also includes data and maps relating to opening hours and clustering of businesses (using a snapshot of business activity data from July 2023). Further detail on the methodology and data sources used in this document can be found in the Appendix.



## Document Information

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## Glossary of terms

| Term | Definition |
|---|---|
| ABS | Australian Bureau of Statistics – the national provider of official government statistics. |
| ANZSIC | Australian and New Zealand Standard Industrial Classification – a method of classifying establishments to a standardised set of industries |
| Employment | The number of employees associated with the establishment(s). Elements of charts and infographics relating to employment throughout this report are coloured red. |
| Establishment(s) | Actively trading business(es) recorded in the Australian Bureau of Statistics Business Register (ABSBR) as at 30th June in each reporting year. Elements of charts and infographics relating to establishments throughout this report are coloured blue. |
| LGA | Local Government Area – the municipal geographic area of a local council. |
| Non-employing business | A business that holds an Australian Business Number (ABN) and is registered for Goods and Service Tax (GST) that does not employ any individuals outside of its directors or sole proprietors. |
| NTE | Night Time Economy – economic activity which occurs at establishments primarily between the hours of 6 p.m. and 6 a.m. The NTE can be broken down into Core, Non-Core and Supply as per the table below. The focus of this report is the Core NTE. |
| SA2 | Statistical Area 2 – An ABS geographic area classification defined using the Census of Population and Housing. |
| Turnover ($m) | The sales and service income generated by the establishment(s), exclusive of goods and service tax (GST). Elements of charts and infographics relating to turnover throughout this report are coloured green. |
| **Sector** | **Description** |
| Core NTE | Economic activity occurring at establishments that provide services to leisure users – mainly between 6pm and 6am. The Core NTE is split into sub-sectors of Drink, Leisure & Entertainment and Food and then further sub-divided by specific activity types. |
| Non-Core NTE | Economic activity occurring at establishments that may operate across the 24-hour day, some of which provide integral services to Core NTE leisure activities. These include public and private transport, hotels and other accommodation, retail services, policing, health, parking, and lighting. |
| Retail & Accommodation | A subset of Non-Core NTE establishments covering Retail (both Food and Retail/Other) and Accommodation. Please see Table 3 in the Appendix for more detail. |
| Supply NTE | Supply NTE establishments tend to operate during the day but are part of the Core NTE supply chain via the production or wholesaling of Food, Drink or Entertainment products for resale in leisure outlets. |
| Non-NTE | This refers to all the other economic activities outside the NTE definition. |
| Total Economy | This is the sum of all economic activity within a defined geography. |

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# Highlights

Data in this report relates to the 2021/22 financial year; a year that started with pandemic restrictions, and then the removal of pandemic rules, enabling Australians to realise their pent-up demand for social, leisure and entertainment activities. This unusual year of restrictions, relief and recovery is apparent within the economic data, where the differing levels of pandemic response have led to uneven impacts and revival across every geography.

## Australia has more Core NTE businesses than ever before

The number of Core NTE businesses increased between June 2021 and June 2022, bringing the total to 131,373 (+8.1k / +7%). The strongest growth was in the Leisure & Entertainment sub-sector (+4.3k / +12%), with over half of the increase due to Creative and Performing Arts activities (+2.6k). The Food (+3.4k / +4%) and Drink (+429 / + 5%) sub-sectors also experienced growth. As of June 2022, there were 20,438 more Core NTE businesses in Australia than before pre-pandemic in June 2019 (+18%), indicating that despite the external challenges the sector has faced over the past few years, it continues to be resilient.

## By 2021/22, sales turnover was higher than pre-pandemic levels

In the 2021/22 financial year, Core NTE businesses generated $146bn in sales turnover. This represents an increase of 10% from 2020/21 and is 5% higher than pre-pandemic levels in 2018/19, however, inflation has increased by 7.6% since the pandemic (4.4% since 2020/21), placing the sector slightly behind 2018/19 in real terms. Like the number of establishments, the strongest percentage growth was in the Leisure & Entertainment sub-sector (+$5.5bn / +14%), driven by Creative and Performing Arts activities (+$1.3bn / +22%) and Sports and Physical Recreation Activities (+$2.1bn / +14%).

## In June 2022, Core NTE employment remained below pre-pandemic levels

Despite a small increase (+1%) in Core NTE employment between June 2021 and June 2022, Core NTE employment was -6% lower in June 2022 than in pre-pandemic June 2019 (66k fewer employees). The Leisure & Entertainment sub-sector had -35k fewer jobs in June 2022 than in June 2019 (-12%) and employment in this sub-sector fell 4% (-11k employees) between June 2021 and June 2022. Employment trends are at odds with the growth in sales turnover, which could be due to businesses' uncertainty about future income in a changed market situation. Inflation, staff shortages and a move towards increased contactless operations could also be contributing factors.

# Introduction

This report provides the latest insights into the Australian Night Time Economy (NTE) during the 2021/22 financial year. During this time, businesses continued to experience considerable restrictions and uncertainty, leading to significant fluctuations in activity. The start of the financial year began with lockdowns and restrictions – particularly in the eastern states and the Australian Capital Territory – but by January 2022 most Australians had been vaccinated and the nation had begun its transition towards 'living with COVID'.

As restrictions lifted, Core NTE businesses provided an opportunity to draw people back to our cities, enabling Australians to socialise and spend some of the savings they had accumulated during the pandemic. Core NTE businesses showed considerable innovation in navigating pandemic restrictions and adapting to evolving consumer habits.

Although Core NTE businesses were able to trade again, they faced challenges such as staff shortages, changes in footfall patterns (contributing to demand unpredictability) and reduced lead-times for bookings. Some of these challenges persist in 2023. These challenges and opportunities have prompted states, territories and local governments to recognise and promote the advantages of fostering safe and vibrant NTEs through actively pursuing strategies, action plans and partnerships to support their development.

This year's report provides details on some of the initiatives that local governments have been implementing in their cities. It then analyses the economic performance of the sector – beginning with an overview of Australia, followed by a summary of trends in the states and territories and detailed analysis for each participating CCCLM member city (although detailed data has been prepared for 88 Australian cities, with a high level summary provided in Table 5, page 77).

In many cases, Core NTE businesses have experienced growth in sales turnover in 2021/22, however, above average inflation is a factor in this performance; with the cost of goods and services in 2021/22 4.4% higher than in 2020/21 and 7.6% higher than in 2018/19 – an important factor to bear in mind when reviewing results.

This report introduces more localised and unique insights for cities, via temporal analysis using the data behind Google Maps. This data complements the economic analysis by providing an understanding of where night time businesses cluster and the typical trading patterns of consumer-facing business activities in each city.

Through 2022/23 and beyond, continued increases in inflation and associated cost pressures – on businesses and individuals – will continue to affect the NTE, and there is already evidence that while recent consumer spend has improved, this is driven more by use of credit than debit cards. The growing interest in the NTE from both the public and private sectors, combined with the latest evidence and insights provided in this report and other datasets, should support the sector going forward.

# The Core NTE in Australia

Following the initial devastating impacts to Australia's Core NTE, arising from the pandemic, the 2021/22 data indicates that Australia's Core NTE recovered well following the easing of restrictions, as evidenced by an increase in the number of businesses and sales turnover.

## Establishments

In 2021/22, Australia's Core NTE comprised over 131,370 Core NTE establishments; an increase of 8,060 firms (+7%) on 2020/21. Most of this growth in the number of establishments occurred in the Leisure & Entertainment sub-sector (+4,275 / +12%). Food establishments also increased in number (+3,350 / +4%). This growth, which is explored further overleaf, has led to a small shift in the mix of activities in Australia's Core NTE. The Food sub-sector now represents 62% of Core NTE businesses (down from 63% in 2020/21), Leisure & Entertainment accounts for 31% (prev. 30%) and Drink continues to represent 7% of Core NTE firms.

## Employment

While the number of establishments grew strongly, the recovery in Core NTE employment slowed (+1%) in 2021/22 to 1,057,895 employees – leaving the sector 6% below pre-pandemic levels. Some of this shortfall in recovery may be due to staff shortages and uncertainty at the time. While Drink (+3%) and Food (+2%) employment rose between 2020/21 and 2021/22, Leisure & Entertainment employment declined 4%, leaving it 13% below pre-pandemic levels, mostly due to employment lost in *Sports and Physical Recreation Activities*. Of the three Core NTE sub-sectors, Food has recovered the most in terms of employment and is now just 3% behind 2018/19 levels.

## Sales turnover

In 2021/22, Australia's Core NTE generated $146bn in sales turnover (+10% on 2020/21), surpassing pre-pandemic levels by +5%, not accounting for inflation (7.6% from 2018/19 to 2021/22 and 4.4% from 2020/21 to 2021/22). The Food and Drink sub-sectors led much of this growth, surpassing 2018/19 levels. Leisure & Entertainment sales turnover grew strongly in the last year (+14%), however, it remained -$1.7bn (-4%) below the 2018/19 peak.

| Measure | # Core NTE 2021<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 131,373<br>+7% | 5.1% |
| Employment | 1,057,895<br>+1% | 7.8% |
| Sales Turnover | $146bn<br>+10% | 3.2% |

# SUB-SECTORAL PERFORMANCE

*Historically, this report has focused on the Core NTE sub-sectors of Drink, Leisure & Entertainment and Food. In recognition of the changing nature of the NTE, this year marks the inclusion of Retail and Accommodation (a subset of the Non-Core NTE).*

## Food

The Food sub-sector showed strong establishment growth in 2021/22, with a 4% increase. Sales turnover also performed very well, increasing +9% to $79.1bn, placing the sub-sector $6.1bn above pre-pandemic levels. This performance was largely driven by Cafes and Restaurants, where sales turnover increased 9% and employment by 3%.

## Drink

Australia's Drink sub-sector continued to grow in 2021/22, reaching 9,457 establishments and increasing sales turnover (+5%) to $21.9bn. This performance was driven primarily by *Pubs, Taverns and Bars*, where sales turnover increased (+9%) to $12.4bn, while liquor retailing sales turnover increased slightly to $9.6bn (from $9.5bn).

## Leisure & Entertainment

While the number of establishments (+12%) and sales turnover (+14%) increased in this sub-sector in 2021/22, employment decreased (-4%). Much of the growth was attributable to *Creative and Performing Arts*, in which the number of businesses increased 15% to 19,437 and sales turnover increased +22% to $7bn – although this remained 17% below pre-pandemic levels. Many of the activities in this sub-sector are close to – or have surpassed – pre-pandemic sales turnover levels, suggesting full recovery may occur in 2022/23.

## Retail & Accommodation (Non-Core NTE)

Both Retail and Accommodation had strong growth in the number of establishments (+8%) and sales turnover in 2021/22, combined with steady employment. This growth meant that sales turnover growth was largely on par with pre-pandemic levels for Accommodation and exceeded pre-pandemic levels for Retail – especially *Non-Grocery Retail* (+$58bn/+28%).

| Core NTE | Establishments 2022 (change 2021-22) | Employment 2022 (change 2021-22) | Sales turnover 2022 (change 2021-22) |
|---|---|---|---|
| Drink | 9,457 (+5%) | 123,040 (+3%) | $21,895m (+5%) |
| Leisure & Entertainment | 41,053 (+12%) | 246,685 (-4%) | $44,963m (+14%) |
| Food | 80,863 (+4%) | 688,170 (+2%) | $79,133m (+9%) |
| **Retail & Accommodation (subset of Non-Core NTE)** | | | |
| Retail | 14,353 (+8%) | 439,780 (-1%) | $265,766m (+10%) |
| Accommodation | 70,783 (+8%) | 113,550 (+3%) | $12,051m (+23%) |

# The NTE in the states and territories

In 2021/22, the number of Core NTE establishments and sales turnover surpassed pre-pandemic levels in every state and territory. Core NTE employment, however, declined in half of the states and territories.

The Northern Territory experienced the greatest percentage growth in sales turnover (+21%) and employment (+16%), putting it 3% below its pre-pandemic peak. New South Wales had the largest absolute increase in Core NTE employment (+14,015 / +5%), driven mostly by the Food sub-sector (+7%) although Core NTE employment remained 14% below 2018/19 levels.

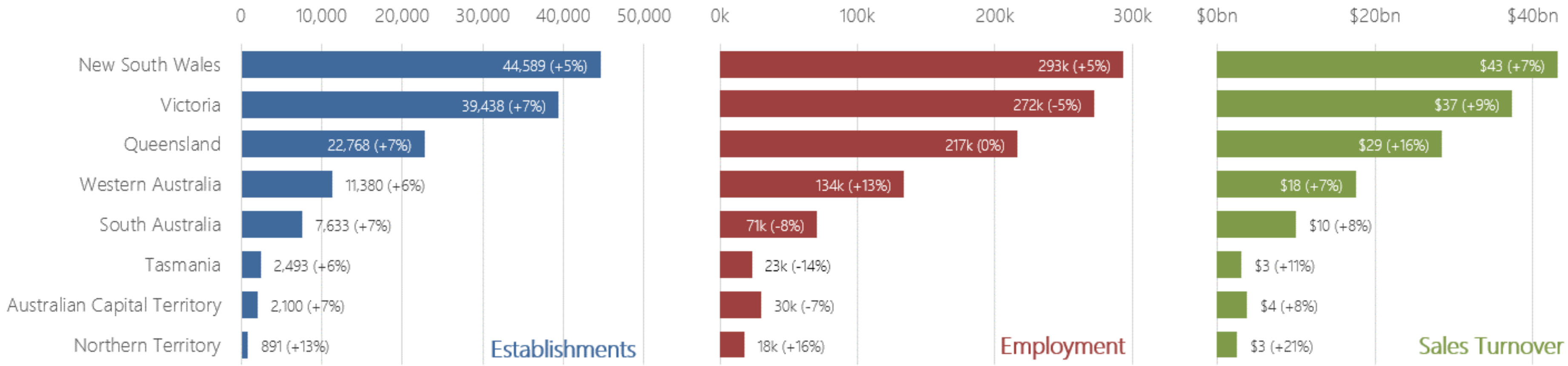
In Victoria, the number of establishments grew 7%, driven mostly by a 17% increase in Leisure & Entertainment (particularly *Creative and Performing Arts* +20%) although many were non-employing. Turnover increased (+9%), but employment declined 5% on 2020/21, mostly due to job losses in Leisure & Entertainment.

In Queensland employment remained steady, but there was a marked increase in sales turnover (+16%) due to particularly strong performance in Leisure & Entertainment (+20%). Sales turnover in this activity returned to 2018/19 levels and Core NTE sales exceeded past their pre-pandemic peak.

Western Australia and the ACT surpassed both pre-pandemic employment and sales turnover levels. In 2021/22, employment grew 11% sales turnover 18% in Western Australia compared to 2018/19, whereas in the ACT employment and sales turnover grew by 1% and 11% respectively.

By comparison, employment in South Australia and Tasmania declined in 2021/22 (-8% and -14% resp.), particularly in the Food sub-sector. These declines mean that Core NTE employment in both states fell below pre-pandemic levels (-11% and -3% resp.), offsetting the strong recovery each area experienced in 2020/21.

*Figure 1: Core NTE establishments employment and sales turnover by state/territory in 2021/22 with change since 2020/21*



# The NTE in the CCCLM member cities

This section explores NTE trends across each of the CCCLM member cities with an initial overview provided below, followed by a chapter for each city that details initiatives and strategies introduced to help support the recovery of their NTEs alongside a review of NTE performance in 2021/22.

Sydney continues to host the densest Core NTE in Australia with 223 establishments per km$^2$. The number of establishments in Sydney increased 6% in 2021/22 to 5,941, with Leisure & Entertainment establishments experiencing particularly strong growth (+14%).

In terms of the number of establishments, Penrith (+15%) and Darwin (+12%) had the strongest Core NTE wide percentage growth, both driven by the Food and Leisure & Entertainment sub-sectors. The same two sub-sectors were responsible for strong absolute growth in the number of establishments in Brisbane and Sydney.

Employment grew strongly in Darwin (+12%) and Perth (+13%) – the latter of which is now 13% above its pre-pandemic peak (2018/19).

Core NTE employment declined in Hobart (-10%), Canberra (-7%), Adelaide (-5%), and Melbourne (-2%) in 2021/22. These recent trends have slowed the post-pandemic recovery for Melbourne and Adelaide, where employment remains below the pre-pandemic peaks of 2018/19. In contrast, employment in Hobart and Canberra remained ahead of 2018/19 levels.

Sales turnover grew strongly in every city, meaning all but two cities (Melbourne and Maroondah) now surpass pre-pandemic levels. As noted in the introduction, above-average inflation will be a factor in this growth, however, both Brisbane and Darwin saw a solid resurgence in sales turnover since 2020/21, leaving both cities around 10% higher than 2018/19 levels.

The turnover trends are at odds with the falls in Core NTE employment, which could be due to businesses' uncertainty about future income in a changed market situation. Inflation, staff shortages and a move towards increased contactless operations could also be contributing factors.

*Table 1: Core NTE by CCCLM member city in 2021/22 with change since 2020/21*

| City LGA | Core NTE Establishments | | Core NTE Employment (000s) | | Core NTE sales turnover ($bn) | | Population (000s) | |
|---|---|---|---|---|---|---|---|---|
| | 2021/22 | % Change 20/21 - 21/22 | 2021/22 | % Change 20/21 - 21/22 | 2021/22 | % Change 20/21 - 21/22 | 2021/22 | % Change 20/21 - 21/22 |
| Adelaide | 983 | 7% | 10.3 | -5% | $1.4 | 7% | 26.1 | 2% |
| Brisbane | 7,411 | 6% | 72.8 | 2% | $9.5 | 20% | 1,284.7 | 2% |
| Canberra | 2,100 | 7% | 30.0 | -7% | $3.8 | 8% | 456.7 | 1% |
| Darwin | 490 | 12% | 5.4 | 12% | $0.7 | 17% | 85.2 | 0% |
| Hobart | 644 | 5% | 7.1 | -10% | $0.9 | 10% | 56.0 | 0% |
| Maroondah | 482 | 8% | 2.9 | 0% | $0.4 | 12% | 115.6 | 0% |
| Melbourne | 3,080 | 7% | 30.6 | -2% | $3.6 | 8% | 159.8 | 4% |
| Newcastle | 1,019 | 4% | 13.1 | 4% | $1.7 | 11% | 171.3 | 1% |
| Parramatta | 1,493 | 4% | 8.3 | 1% | $1.3 | 8% | 259.9 | 1% |
| Penrith | 712 | 15% | 4.0 | 9% | $0.5 | 12% | 220.8 | 1% |
| Perth | 649 | 2% | 11.3 | 13% | $1.3 | 6% | 30.4 | 2% |
| Sydney | 5,941 | 6% | 34.1 | 5% | $4.7 | 6% | 217.7 | 1% |

## TRADING PATTERNS OF THE NTE

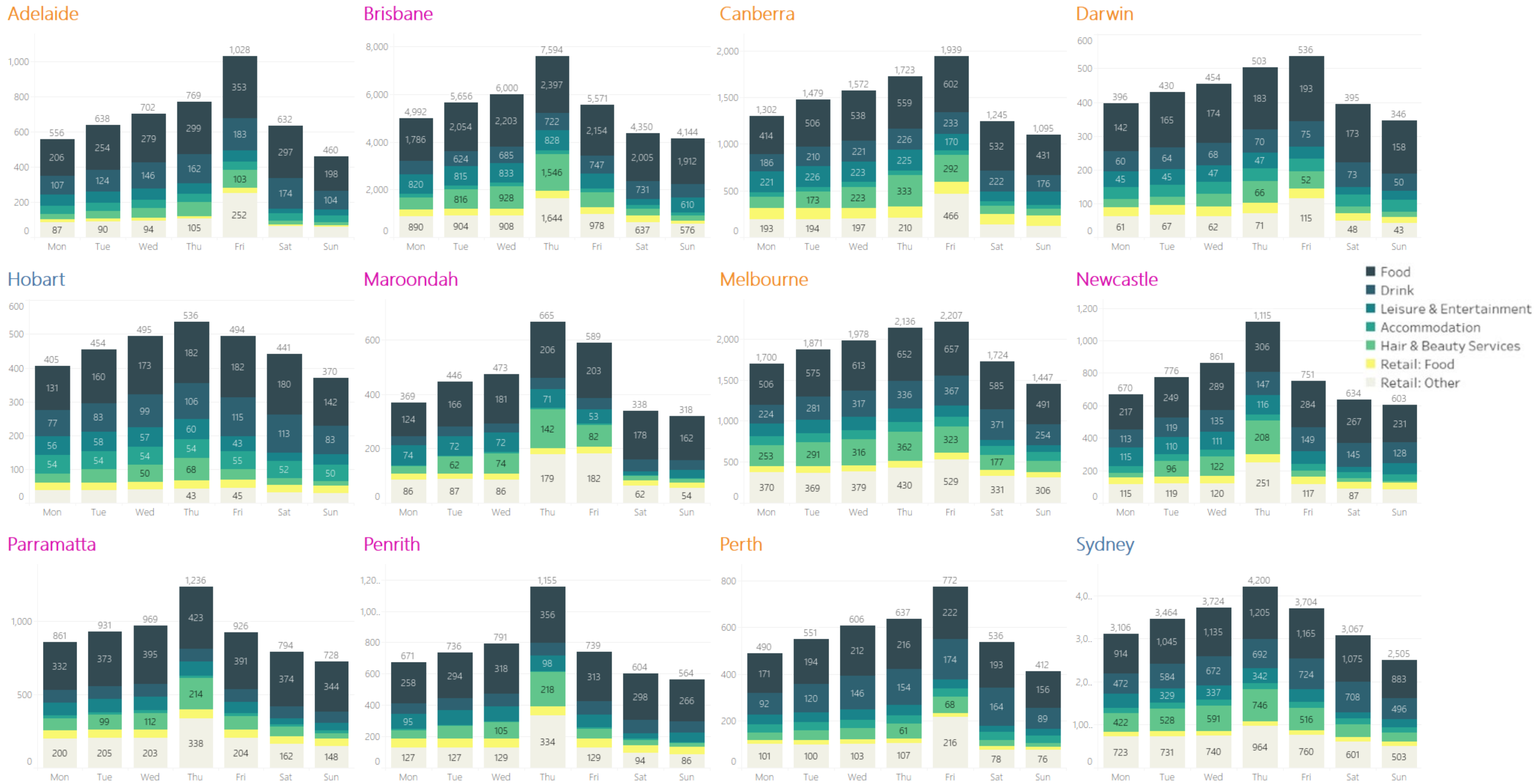
This year marks the introduction of trading patterns analysis using a July 2023 snapshot of the data behind Google Maps. The following chapters explore this data (along with economic performance data) in more detail for each LGA, but Figure 2 below provides an overview of the trading patterns of night time (6pm-6am) businesses in each city across the week.

Interestingly, this analysis shows Saturday and Sunday nights tend to be quieter than Thursday and Friday nights in every city.

It also identifies three distinct types of trading patterns:

- Friday peak: (Adelaide, Canberra, Darwin, Melbourne, Perth)
- Thursday peak: (Hobart, Sydney)
- Strong Thursday peak (Brisbane, Maroondah, Newcastle, Parramatta, Penrith).

*Figure 2: Number of Core NTE, Retail, Accommodation and Hair/Beauty business **open at night** (at some point 6pm and 6am) across each city (categorised by colour)*




# Adelaide, SA

Surrounded by world-famous wine regions, Adelaide is Australia's only city to be awarded Great Wine Capital of the world status. Renowned for its creative culture, Adelaide is a member of the UNESCO Creative Cities network, has been designated as the first and only City of Music in Australia and is renowned as Australia's festival city.

## ADELAIDE'S CITY INITIATIVES

As the cultural heart of South Australia, Adelaide continued to prioritise initiatives that supported economic recovery through city visitation generated by the arts, entertainment and hospitality sectors. The City of Adelaide launched its Reignite Adelaide program designed to deliver additional cost savings, remove obstacles for businesses and event organisers to invest, activate even more spaces, and create compelling reasons for people to come back to the city.

Together, the City of Adelaide and Adelaide Economic Development Agency (AEDA) have worked to support the local economy. AEDA's focus is on investment attraction, growing the visitor economy, residential growth, marketing the city as a whole and promoting Rundle Mall as Adelaide's premier shopping destination.

Overall, the City of Adelaide invested more than $20m into city recovery initiatives. Examples of some of these initiatives include:

- The continuation of Adelaide Unleashed, a $1m city-wide street activation program, funded by the State Government, with temporary street closures, expanded outdoor dining, music, art and entertainment.
- Friday Night Live Incentives Scheme supported 42 venues to bring back regular live music programming across the city, with the bulk of the funding delivered directly to musicians.
- The popular 'Dinner's On Us' vouchers returned adding $225,700 to the local economy. For every $1.00 of voucher redeemed, an additional $2.10 was spent by customers.
- Increasing the number of businesses accessing temporary parklets scheme, which allowed businesses to maximise their outdoor occupancy. The City of Adelaide also waived outdoor dining permit fees.
- Shopfront improvement grants of $700,000 in the city and North Adelaide to increase street vibrancy and attract new and repeat customers to local businesses. This included funds dedicated to artwork installations in vacant shopfronts.
- In partnership with the South Australian Tourism Commission, the City of Adelaide was marketed as a must stay destination, through Luxury Escapes, resulting 333,354 bed nights in the city.
- An Event Fee Free and over $1.3m in Events and Festivals Sponsorship funding was distributed in grants.
- The Hit the Town Winter Campaign in partnership with RAA to generate 492 bookings for local events and activities totalling $55,114 in revenue, with 50% booking growth and 80% revenue growth compared with 2019.
- The Events Recovery Fund provided $345,000 in sponsorship funding to nineteen festivals and events activating the night time economy to respond to the impacts of the pandemic.

Since the 2020/21 financial year the City of Adelaide has continued to be proactive in developing its economy. This includes through the launch of Project Night Light, a pilot program that prioritises women's safety and aims to enhance Adelaide's status as a safer city for all to enjoy, and a partnership with the University of Melbourne's Night Shift Research Team to better understand and enhance the City of Adelaide's night time economy.

## Adelaide's NTE performance

Almost 13% of South Australia's Core NTE businesses are located within the City of Adelaide LGA, generating 14% of the state's Core NTE sales turnover and employing 14% of the state's Core NTE workforce.

The Core NTE in Adelaide is a key part of the city's overall economy, accounting for 8% of all establishments, 13% of employment and 5% of sales turnover (compared to 5%, 8% and 3% for the Core NTE nationally).

The city has 376 Core NTE businesses per ten thousand residents; the highest density of Core NTE per residential population of all 88 LGAs analysed. Similarly, it has the highest number of Food (692) and Drink (149) businesses per 10k residential population.

Between 2020/21 and 2021/22, both the number of Core NTE businesses (+7%) and value of sales turnover generated by these businesses (+7%) increased, bringing the number of establishments and sales turnover to higher levels than before the pandemic. In June 2022, however, Core NTE employment was 5% below what it was in June 2021 and 9% below what it was in pre-pandemic levels in June 2019.

### Sub-sectoral performance

When compared to Australia as a whole, Adelaide's Core NTE comprises a higher-than-average proportion of Food and Drink, and a smaller proportion of Leisure & Entertainment businesses.

Between June 2021 and June 2022, Adelaide gained 39 Food businesses, but lost 455 employees. Despite this, the sub-sector generated $853bn in 2021/22, which is 5% growth on the previous year, and 7% more than 2018/19. Adelaide also gained 18 Drink businesses between 2021 and 2022 – all classified as Pubs, Taverns and Bars.

Adelaide gained 30 Leisure & Entertainment businesses between June 2021 and June 2022. Most (17) of these were classified as Creative and Performing Arts Activities. This industry is an existing strength of Adelaide's Leisure & Entertainment sub-sector, comprising 49% of business in this sub-sector.

Both retail and accommodation establishments and sales turnover increased between 2021 and 2022, although employment fell, following a similar pattern to the Core NTE.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 983<br>+7% | 8% |
| Employment | 10,345<br>-5% | 13% |
| Sales Turnover | $1,357m<br>+7% | 5% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 149<br>+6% | 15% |
| Entertainment | 142<br>+13% | 14% |
| Food | 692<br>+6% | 70% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 458 | +8% |
| Accommodation | 87 | +14% |

## ADELAIDE'S BUSINESS CLUSTERING

Figure 3 shows the location and concentration of the City of Adelaide's Core NTE, Retail, Hair and Beauty Services that trade at some point between 6pm and 9pm of July 2023.

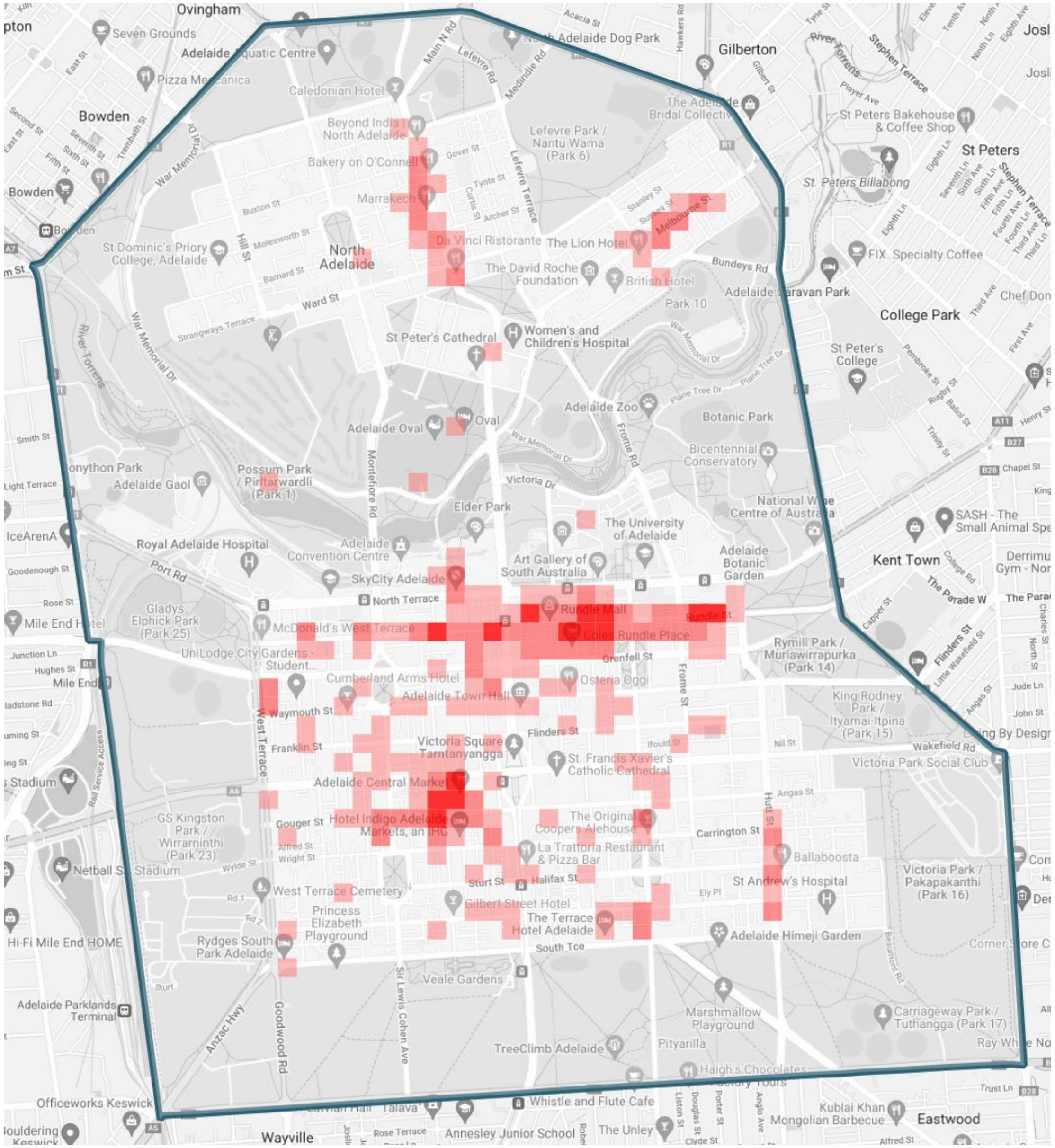
Clusters of consumer-facing activity can be found in the evening:

- Along Hindley Street, through Rundle Mall and along Rundle Street in the East End.
- Around Adelaide Central Market and Gouger Street
- Along Hutt Street; and
- Melbourne Street and O'Connell Street in North Adelaide.

A more detailed map can be viewed online here.

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 3: Adelaide LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*




Number of businesses trading per hectare (100m x 100m)

- Less than 2
- 2 - 4
- 5 - 10
- More than 10

LGA boundary

## ADELAIDE'S TRADING PATTERNS

Friday has (by far) the highest number of consumer-facing businesses open at night in the City of Adelaide LGA. This is driven by the CBD's Friday night late night trading. This includes retail and hair and beauty businesses which trade in the evening hours (50% of these businesses are open between 6pm and 9pm on Fridays) and follows a similar pattern to the City of Perth.

Sunday is the night when the smallest number of businesses are open.

As with all other cities, Core NTE businesses open later into the night and early hours on Friday and Saturday than other days of the week.

*Figure 4: Number of business **open at night** (at some point 6pm and 6am)*

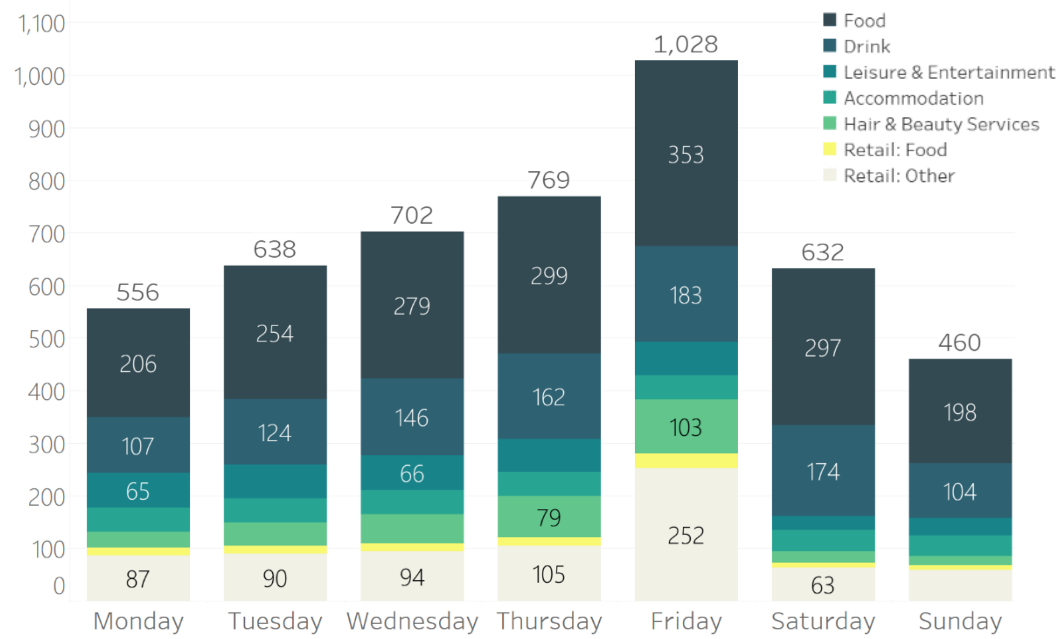



*Figure 6: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 42% | 26% | 8% | 6% |
| Tuesday | 49% | 31% | 8% | 6% |
| Wednesday | 54% | 35% | 9% | 6% |
| Thursday | 57% | 38% | 10% | 6% |
| Friday | 65% | 45% | 18% | 7% |
| Saturday | 53% | 45% | 19% | 8% |
| Sunday | 36% | 25% | 8% | 6% |

*Figure 5: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 17% | 8% | 5% | 5% |
| Tuesday | 20% | 9% | 5% | 5% |
| Wednesday | 22% | 9% | 5% | 5% |
| Thursday | 26% | 9% | 6% | 6% |
| Friday | 50% | 9% | 6% | 6% |
| Saturday | 12% | 9% | 5% | 5% |
| Sunday | 11% | 8% | 5% | 5% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*

# Brisbane, QLD

Brisbane is a diverse and vibrant city, with an extensive geographic footprint. In 2021, the International Olympic Committee elected Brisbane as the Host City of the 2032 Olympic and Paralympic Games, which is expected to boost tourism and deliver health, volunteering and community benefits.

## Brisbane's City Initiatives

Brisbane City Council has been taking action to support Brisbane's night time economy by delivering on a number of initiatives including those identified in the *Economic Recovery Plan and the Rebuild & Recover: Flood Resilience Action Plan*. Support for Brisbane's night time economy includes:

- Delivery of the free Brisbane app to promote businesses and experiences via a one-stop destination built for residents, visitors and local businesses to find things to see and do in Brisbane.
- To achieve the vision for its vibrant, creative city with a range of festivals, events, live entertainment and creative enterprises, Council has introduced the Events Local Law 2022. Modernising the local law reduces the regulatory burden on operators of entertainment venues and brings the local law in line with current standards, community expectations and legislative changes.

Brisbane City Council acknowledges the ongoing challenges Brisbane businesses have faced throughout the pandemic and the February 2022 flood event and the need to strengthen the night time economy now and into the future.

The Creative Brisbane Creative Economy Strategy aims to strengthen Brisbane's liveability as a vibrant creative hub. The strategy will ensure Brisbane is the premier location for talented people to live, work, relax, raise families, and develop careers and economic potential. Council continues to invest in and support individuals, organisations, venues and events that offer evening and night time experiences.

During 2021/22, Brisbane City Council continued to back local businesses, supporting jobs and encouraging the community to get outside and explore their city and local businesses.

Examples include:

- Renewed focus on festivals and events including, the iconic Brisbane Festival and Queensland Music Festival along with more than 150 suburban, community and multicultural events including Paniyiri, Teneriffe Festival and Wynnum Fringe Festival.
- Expansion of Botanica – Contemporary Art Outside, an open-air art exhibition in the City Botanic Gardens.
- Continuing the Brisbetter Days Out campaign to highlight and encourage visits to local retail, dining and recreation venues in every Brisbane postcode and including Brisbane's night time economy.
- Supporting the CBD through a local advocacy campaign, Love BNE and campaigns such as Dine BNE City and Sea to the City, special dining offers and Shop BNE City.

## Brisbane's NTE performance

The City of Brisbane is a geographically large and populous LGA. As such, Brisbane has the highest number of Core NTE businesses, and Leisure & Entertainment establishments of all 88 local government areas analysed.

One third of Queensland's Core NTE businesses are located within the City of Brisbane LGA. These businesses generate a third of the state's Core NTE turnover and employ 34% of the state's Core NTE workforce.

Between 2021 and 2022, the number of people employed within Core NTE businesses and Core NTE sales turnover grew at faster rates than the national average.

### Sub-sectoral performance

Between June 2021 and June 2022, Brisbane gained 208 Food businesses and 390 Food employees. These businesses generated $5.8bn in sales turnover in 2021/22; 18% more than in 2020/21 and 18% higher than before the pandemic in 2018/19 (outperforming inflation).

When compared to the rest of Australia, Brisbane Core NTE has a slightly higher proportion of Food businesses (65% compared to 62%) and a smaller proportion of Drink businesses compared to the rest of Australia (4% compared to 7% nationally). The Drink sub-sector gained 26 businesses in 2022 (+10%), comprising 10 Liquor Retailing establishment and 16 Pubs, Taverns and Bars

The number of Leisure & Entertainment businesses in Brisbane increased by 418 between June 2021 and June 2022. The largest increases were in the Creative and Performing Arts Activities (+246 / +30%) and Sports and Recreation Activities (+132 / +20%) industries. Both these industries also saw employment and sales turnover growth in the same period.

The number of Accommodation businesses increased by 14% between June 2021 and June 2022. Sales turnover (38%) and employment (4%) also increased.

The Retail sector in the city also grew, with 10% more businesses, 20% more employees and 36% higher sales turnover in 2021/22, compared to pre-pandemic 2018/19.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 7,411<br>+6% | 5% |
| Employment | 72,760<br>+2% | 10% |
| Sales Turnover | $9,466m<br>+20% | 4% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 295<br>+10% | 4% |
| Entertainment | 2,263<br>+8% | 31% |
| Food | 4,853<br>+5% | 66% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 4,883 | +4% |
| Accommodation | 498 | +14% |

## BRISBANE'S BUSINESS CLUSTERING

Figure 7 shows the location and concentration of Brisbane's Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm of July 2023.

The City of Brisbane covers a vast geographic area, with many clusters of consumer-facing evening activity. The densest of these are around the CBD, Fortitude Valley and the West End. There are, however, many other pockets of activity, especially around retail centres such as:

- Indooroopilly Shopping Centre
- Mount Ommaney Centre
- Westfield Chermside
- Westfield Carindale; and
- Westfield Mount Gravatt.

A more detailed map can be viewed online [here.](here)

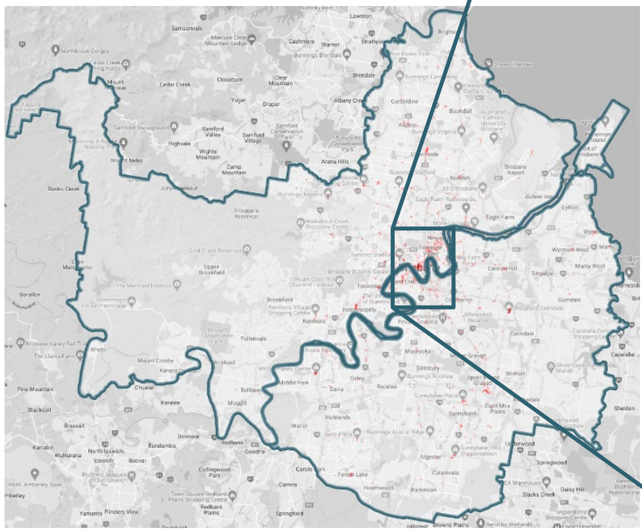
*See 'Using supplementary maps' (Appendix p74) for guidance.*

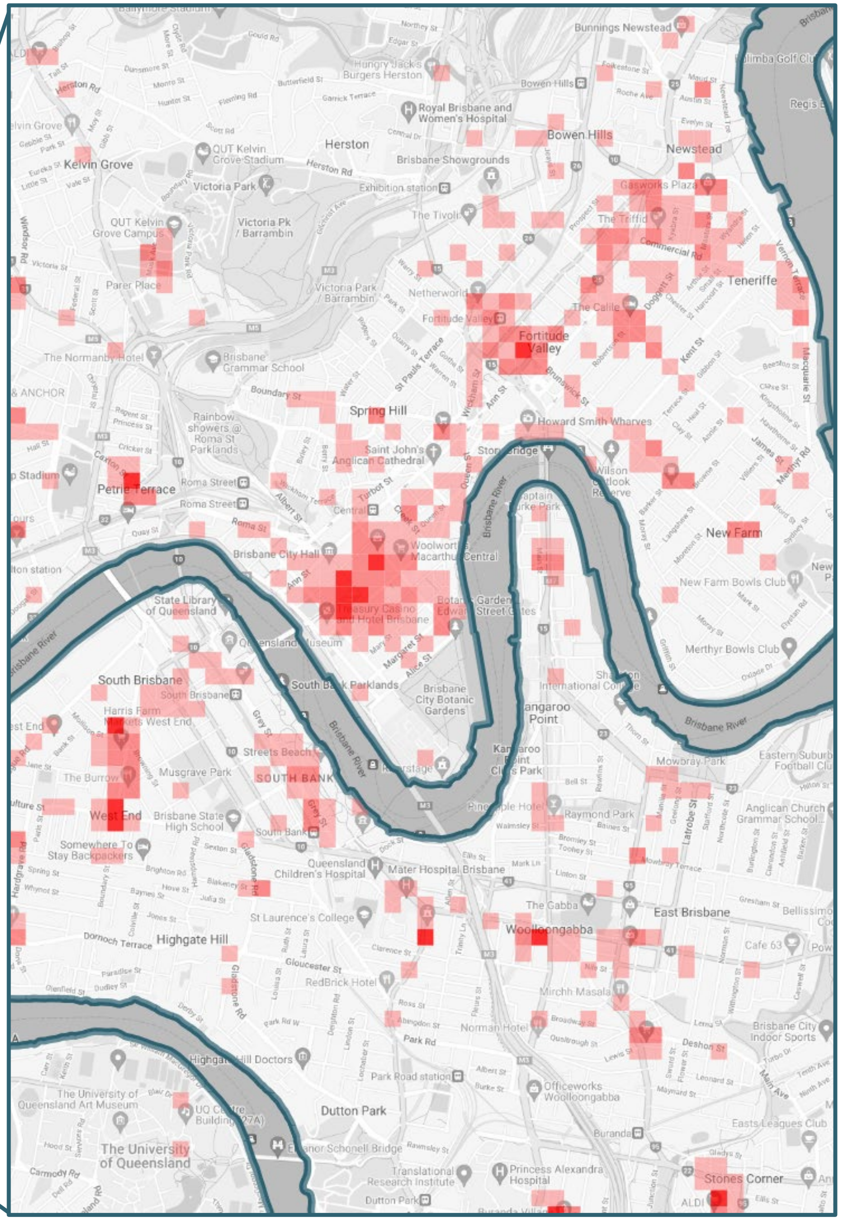
*Figure 7: Brisbane LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*

Number of businesses trading per hectare (100m x 100m)

- Less than 2
- 2 - 4
- 5 - 10
- More than 10

LGA boundary





## BRISBANE'S TRADING PATTERNS

Thursday is by far the busiest night of the week in Brisbane, in terms of the number of consumer-facing businesses trading after 6pm. This is driven by a higher proportion (44%) of Retail, Hair and Beauty Services trading into the evening (6-9pm). This is like many other Australian cities, although Brisbane's overall trading patterns (as per Figure 6) are most similar to the City of Newcastle. When compared to the other cities analysed, a higher-than-average proportion of Core NTE businesses are open sometime between 3am and 6am. This is especially apparent on weeknights, when compared to weekdays.

*Figure 8: Number of business **open at night** (at some point 6pm and 6am)*

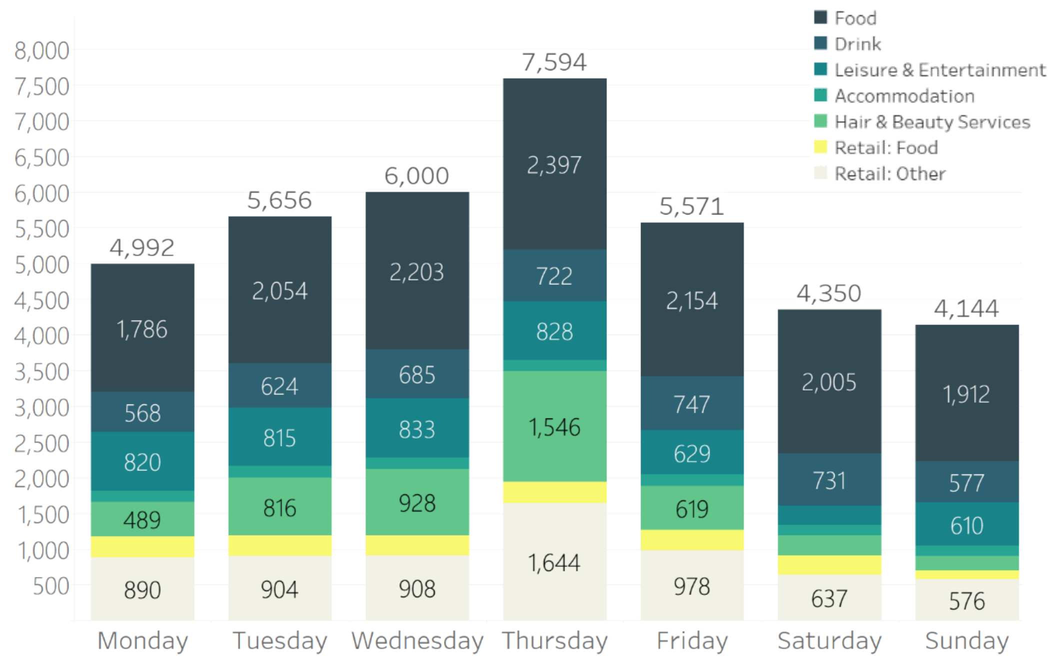



*Figure 10: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 49% | 19% | 7% | 19% |
| Tuesday | 55% | 20% | 7% | 19% |
| Wednesday | 59% | 22% | 7% | 19% |
| Thursday | 63% | 24% | 8% | 19% |
| Friday | 59% | 28% | 9% | 10% |
| Saturday | 51% | 27% | 9% | 9% |
| Sunday | 42% | 20% | 7% | 19% |

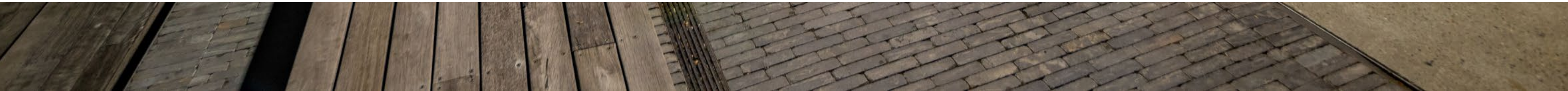
*Figure 9: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 21% | 7% | 4% | 5% |
| Tuesday | 25% | 7% | 4% | 5% |
| Wednesday | 27% | 7% | 4% | 5% |
| Thursday | 44% | 7% | 4% | 5% |
| Friday | 24% | 7% | 4% | 5% |
| Saturday | 15% | 7% | 4% | 4% |
| Sunday | 11% | 6% | 4% | 5% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*


# Canberra, ACT

The nation's capital, Canberra, is known for its cultural attractions and thriving food and wine scene. The inner-city corridor stretching from Acton, Civic and Braddon, Dickson and inner south suburbs like Kingston house most of the cafes, restaurants, bars and entertainment venues including theatres and cinemas.



## CANBERRA'S CITY INITIATIVES

The Australian Capital Territory (ACT) Government has committed to developing a vibrant and inclusive night-time economy in Canberra that supports businesses and the community. The ACT Government has heard from Canberra businesses that the night-time and entertainment economy has been significantly impacted by the pandemic.

In July 2023, ACT Minister for the Arts, Business and Better Regulation, Human Rights, Multicultural Affairs and Assistant Minister for Economic Development, Tara Cheyne announced a draft vision for the night time economy in Canberra:

*"Our Vision is for a city where the night brings exciting opportunity for all Canberrans and visitors to connect, explore culture, work and have fun. A city after dark that is safe, easy to get around and accessible. Where there is plenty to see and do, which is visible or easily found. Where talents and creativity of businesses, artists and entrepreneurs are readily showcased and valued. Canberra, day and night, a better experience for everyone."*

The Better Regulation Report: A report on how we are improving business regulation in the ACT was released in 2022 as a response to the pandemic and committed the ACT Government to a review of the legislative, regulatory, policy and process-related components of the night-time economy with a view to undertake reform. This reform will put in place best practice regulatory settings to ensure that the regulatory arrangements for the night-time and entertainment economy are meeting their intended objectives in a complex and changing environment.

In August 2023, the ACT Government commenced a process to establish a panel of 30+ people from small businesses, community representative groups, tourism providers, as well as the arts and live music sector to join a deliberative panel to explore the shape of the ACT Government's approach to regulatory and non-regulatory changes that will support a successful night-time and entertainment economy in the ACT.

The ACT Government is also establishing entertainment precincts, commencing with a City Centre Entertainment Precinct as part of reform on the ACT's planning system. The introduction of the City Centre Entertainment Precinct will further ensure the ACT's regulatory settings are fit-for-purpose to achieve an activated night-time economy in Canberra's City Centre and will provide a testcase for future ACT Entertainment Precincts and night-time and entertainment settings more broadly.

## Canberra's NTE Performance

In 2022, Canberra's Core NTE establishment numbers increased by 7%, to 2,100, surpassing pre-pandemic levels by 7%. On the employment front, Canberra's Core NTE faced challenges. The number of jobs* reduced 7% to 30,030 in 2022, placing the sector 7% below pre-pandemic levels. In contrast, Australian Core NTE employment in 2022 was 1% below pre-pandemic levels.

Despite employment challenges, turnover in Canberra's Core NTE sector was strong, growing by 8% to reach $3.8bn in 2022, surpassing pre-pandemic levels by 11% (outperforming the national trend of +5%) and highlighting Canberra's economic resilience within the challenging NTE landscape.

### Sub-sectoral Performance

Canberra experienced robust growth in its Food sub-sector, with the number of establishments increasing by +8% from 1,357 in 2021 to 1,465 in 2022, driven by a +9% increase in *cafes and restaurants*. This expansion contributed to a +6% growth in turnover to $2.4bn.

The Drink sub-sector also saw substantial growth; drink establishments surged 20% from 111 to 133 in 2022 driven by a 47% increase in *Liquor Retailing* establishments. This led to a notable 20% increase in sales turnover, reaching $380m and far surpassing the pre-pandemic baseline.

Leisure & Entertainment saw modest growth, adding 15 establishments (+3%) in 2022 and a fall in employment (-7%) due to losses in *Clubs (Hospitality) (-12%)* and *Sports and Physical Recreation activities (-9%)*. Sales turnover grew by 8% to $1.1bn.

The number of Retail businesses in the ACT increased 6% between June 2021, and June 2022, while the number of employees working at these businesses fell by -19%. Grocery retail fared slightly worse than non-grocery and fell more in line with pre-pandemic behaviour. Nonetheless, sales turnover increased, albeit modestly, by +1%. The Accommodation sub-sector experienced a loss of businesses (-5%) and employment (-12%) in the financial year ending June 2022, although sales turnover increased by 17%.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 2,100<br>+7% | 6% |
| Employment | 30,030<br>-7% | 13% |
| Sales Turnover | $3,835m<br>+8% | 5% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 133<br>+20% | 6% |
| Entertainment | 502<br>+3% | 24% |
| Food | 1,465<br>+8% | 70% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 1,027 | +6% |
| Accommodation | 93 | -5% |

* Caution should be applied to the employment results in this section, given the small sample size of the ABS' Labour Force Survey for the ACT. See the appendix for more information.

## CANBERRA'S BUSINESS CLUSTERING

Figure 11 shows the location and concentration of Canberra's Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm of July 2023.

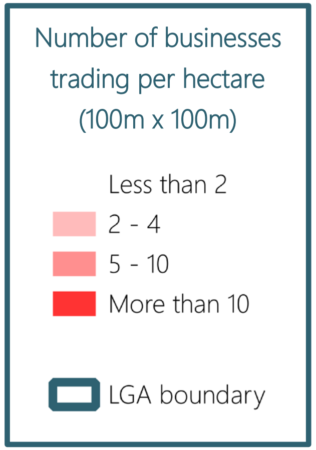
The Australian Capital Territory covers a large geographic area, and most of the consumer-facing evening activity can be found to the north. Substantial clustering of activity can be found in the city centre, in the location of the proposed special entertainment precinct. There are, however, clusters of evening activity in surrounding suburbs and towns, including:

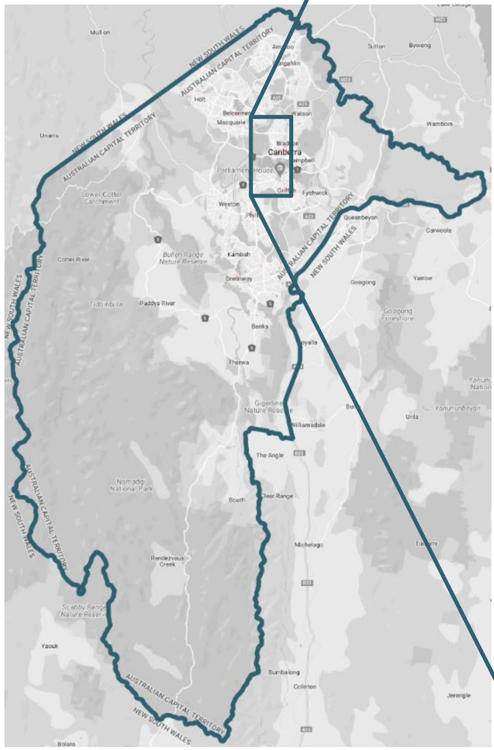
- Belconnen
- Gungahlin
- Phillip (Woden)
- Griffith (Manuka); and
- Greenway (Tuggeranong).

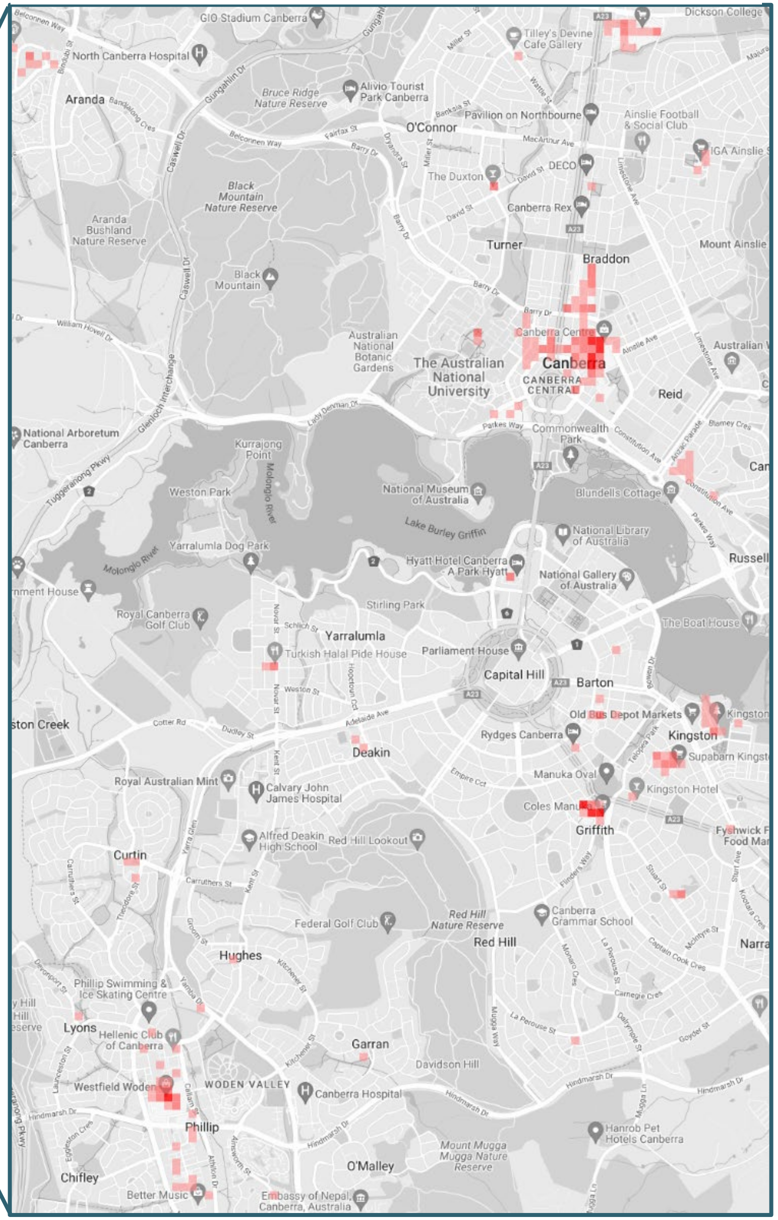
A more detailed map can be viewed online [here.](here)

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 11: Canberra's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*





## CANBERRA'S TRADING PATTERNS

In the ACT, Friday is the day of the week with the highest number of consumer-facing businesses open at night. This is driven in particular by a higher number of retail stores opening on Friday evenings.

The ACT has a similar pattern of trading hours to the City of Darwin, with the number of businesses open in the evening gradually increasing on each day of the week and then trailing off on Saturday and Sunday.

With the exception of food venues, Sunday night is the quietest.

*Figure 12: Number of business **open at night** (at some point 6pm and 6am)*

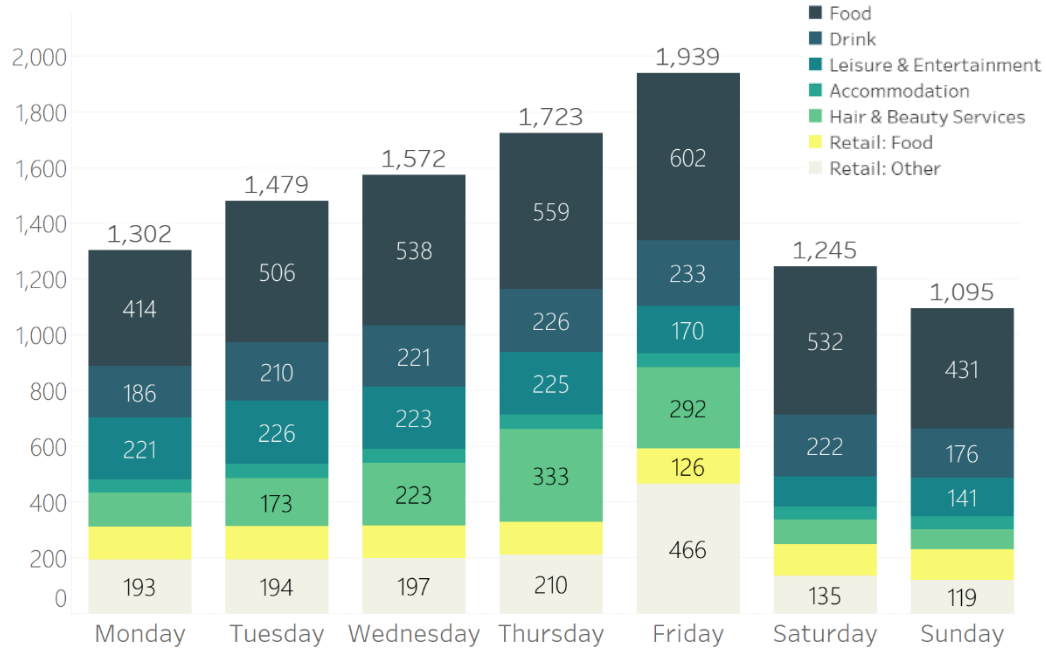



*Figure 14: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 48% | 20% | 7% | 10% |
| Tuesday | 56% | 24% | 7% | 10% |
| Wednesday | 58% | 25% | 7% | 10% |
| Thursday | 60% | 27% | 8% | 11% |
| Friday | 59% | 31% | 10% | 8% |
| Saturday | 51% | 29% | 10% | 8% |
| Sunday | 42% | 20% | 7% | 10% |

*Figure 13: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 22% | 7% | 3% | 3% |
| Tuesday | 25% | 7% | 3% | 3% |
| Wednesday | 28% | 7% | 3% | 3% |
| Thursday | 34% | 7% | 3% | 3% |
| Friday | 46% | 7% | 3% | 3% |
| Saturday | 17% | 7% | 3% | 3% |
| Sunday | 15% | 6% | 3% | 3% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*

# Darwin, NT

A multicultural and modern city, Darwin has been described as Australia's gateway to South East Asia. The Larrakia people, its traditional owners, form an important part of the city's community and culture. The Northern Territory's capital city is known for its warm nights, waterfront dining options, cultural festivals, and bustling night markets.

## DARWIN'S CITY INITIATIVES

City of Darwin has been taking actions to help rebuild Darwin's NTE by delivering initiatives under the 2030 Economic Development Strategy.

City of Darwin continues to focus on promoting Darwin as a destination to study, work, live, and do business. Some key initiatives include:

- Signing of a Sister City Agreement with Denpasar, Indonesia.
- Delivery of several key hospitality and workforce attraction programs by the local industry to rectify the NTE workforce shortage issue in Darwin.
- Lord Mayor participated in a Dili worker attraction delegation in 2022 with the Chamber of Commerce NT.
- Hosted the first ever Darwin International Virtual Trade Show 2022, which successfully attracted 107 businesses and organisations to set up booths and 1,000 attendees from Darwin and its 10 Sister and Friendship Cities. There was a total of 27,780 shares, likes, and hits on social media and the newspaper coverage reached over 5m subscribers.
- Supporting the development of a Larrakia Tourism Incubator Program with funding to develop unique First Nations tourism experiences for Darwin.
- Other promotional activities such as:
  - Launch of a Discover Darwin website in June 2022 - The new public website provides a platform for NTE businesses. This includes a free business directory - where the NTE sectors can list their service and products to the visitors.
  - Podcasts about Darwin.

City of Darwin provided $1.65m in funding to the community organisations, events, and projects to activate Darwin's economy through City of Darwin sponsorship, operational subsidy, grants, and fee waivers. The provision of $270,000 sponsorship to local event organisers in 2021/22 has attracted 283,000 participants and increased the local expenditure by $305m. In addition, City of Darwin issued 363 event permits for the events to be delivered in Darwin municipality, which contributed to an increase in the local expenditure in 2021/2022.

Other initiatives operated by the City of Darwin to support the NTE include:

- Expanding the commercial e-scooters and e-bike trail areas for visitors to travel around the municipality and spend in the NTE sectors.
- Advocacy to the Northern Territory Government and Federal Government for more tourism-related funding for Darwin. This includes the provision of a free one stop grant funding platform for the community via City of Darwin Funding Finder (grantguru.com).
- As of April 2022, myDarwin supported 343 NTE merchants, 54,433 users, and $9,906,948 in economic spend in local businesses.

## Darwin's NTE performance

Darwin's Core NTE experienced a resurgence in 2022. Core NTE establishments surged by 12% reaching a total of 490 and outpacing the national growth rate (+9%). More than half (55%) of the Northern Territory's Core NTE establishments are located within the City of Darwin LGA, equating to 58 establishments per 10,000 residents.

Employment in Darwin's Core NTE also showed strong growth, increasing by 12% to reach 5,400 jobs in 2022, although it remained 3% below pre-pandemic levels. In contrast, Australia's Core NTE employment experienced a modest 1% increase.

Darwin's Core NTE turnover in 2022 hit $749m, reflecting an impressive 17% growth year on year, and 10% higher than pre-pandemic levels. This performance outpaced the national trend, highlighting the sector's resurgence in Darwin and that the pandemic does not seem to have affected growth potential.

### Sub-sectoral performance

Leisure & Entertainment experienced considerable growth in 2021/22, with the number of establishments surging 19% to 137, driven by *Creative and Performing Arts (+15%)* and *Sports and Physical Recreation (+22%)*. Employment (+30%) and turnover (+22%, $282m), also increased in the sub-sector.

Similarly, the Food sub-sector showed robust growth, with the number of establishments increasing 10%, to 329 in 2022 – primarily in *Takeaway Food Services (+22 / +15%)*. Employment grew by 7% (+205) to 3,415 employees and turnover also increased a healthy 14% increase, reaching $409m and surpassing pre-pandemic levels by 13%.

The Drink sub-sector was stable, with the number of establishments remaining constant, although employment increased modestly (+7% / +30) and turnover rose 14%, reaching $58m in 2021/22.

The number of Retail businesses increased by 1% between June 2021 and June 2022, but these businesses generated 20% more sales turnover year on year. Similarly, while the number of Accommodation businesses remained constant, they generated 29% more sales turnover in 2021/22 than in the previous year.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 490<br>+12% | 7% |
| Employment | 5,400<br>+12% | 10% |
| Sales Turnover | $749m<br>+17% | 4% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 24<br>+0% | 5% |
| Entertainment | 137<br>+19% | 28% |
| Food | 329<br>+10% | 67% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 287 | +1% |
| Accommodation | 60 | +0% |

## DARWIN'S BUSINESS CLUSTERING

Figure 15 shows the location and concentration of Darwin's Core NTE together with Retail, Hair and Beauty Services businesses, trading at some point between 6pm and 9pm of July 2023.

The City of Darwin's consumer-facing evening time businesses are most active around the CBD, to the south of the LGA.

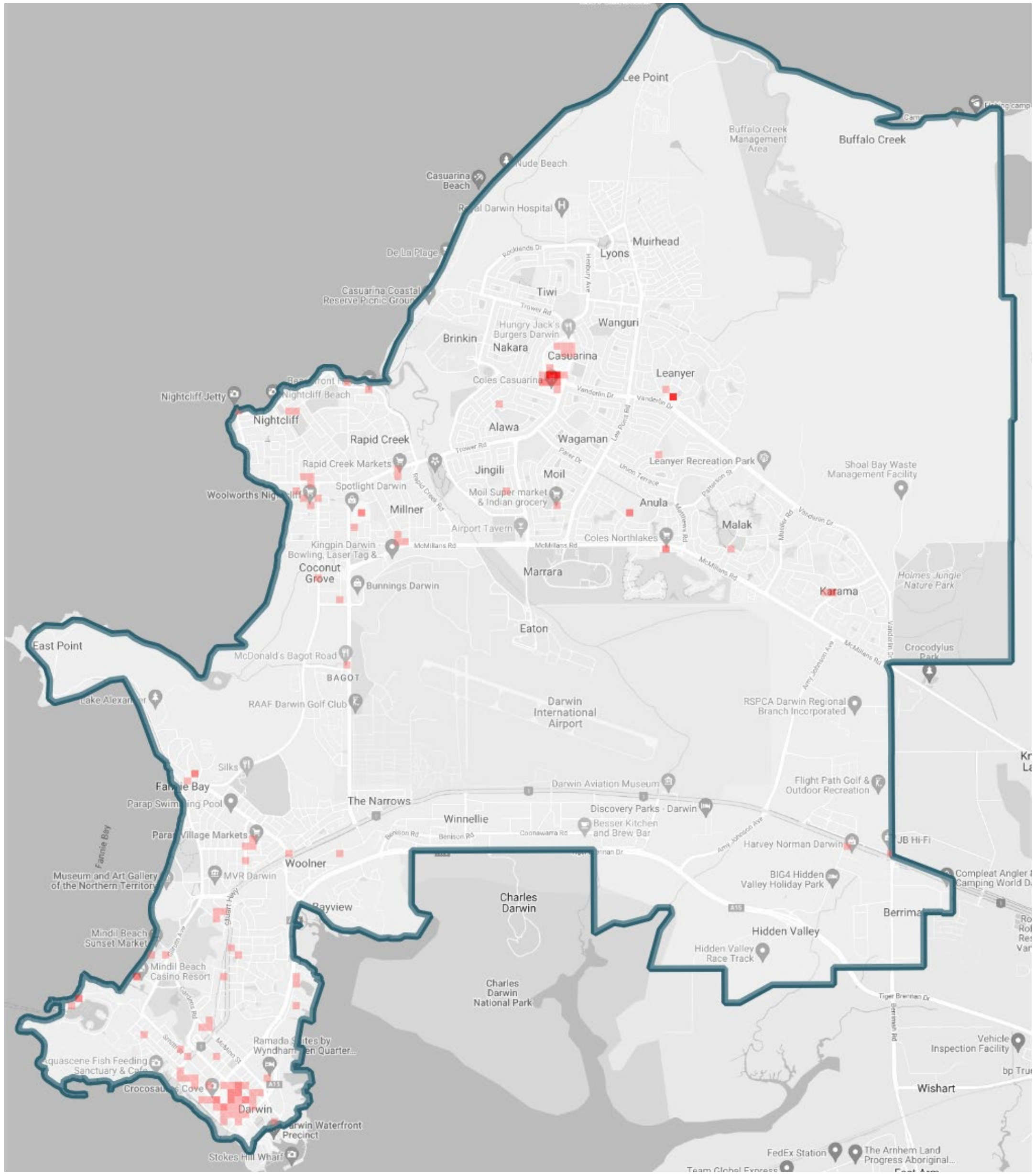
Other pockets of activity can be:

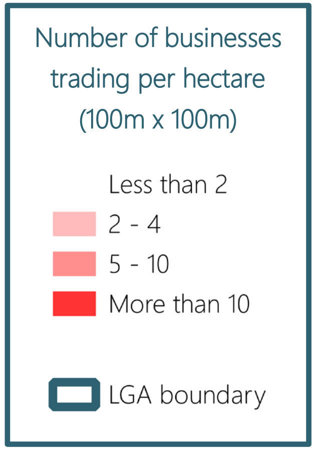
- Around Casuarina Square Shopping Mall
- Along Marina Boulevard in Cullen
- At the Hibiscus Shopping Centre in Leyanyer; and
- Within the suburb of Nightcliff.

A more detailed map can be viewed online [here.](here)

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 15: Darwin LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*



## DARWIN'S TRADING PATTERNS

Friday is the day with the highest number of businesses open at night in the City of Darwin LGA. The city has a similar pattern of trading hours to Canberra, with the number of businesses gradually increasing during the week before trailing off on the weekend.

While 63% of Darwin's Core NTE businesses trade between 6pm and 9pm on Fridays (higher than average), only 30% of Retail, Hair and Beauty Services are open. This is the lowest propostion of all cities examined, suggesting there are opportunities to encourage a greater diversity of night time consumer activity in Darwin, dependent on market demand.

*Figure 16: Number of business **open at night** (at some point 6pm and 6am)*

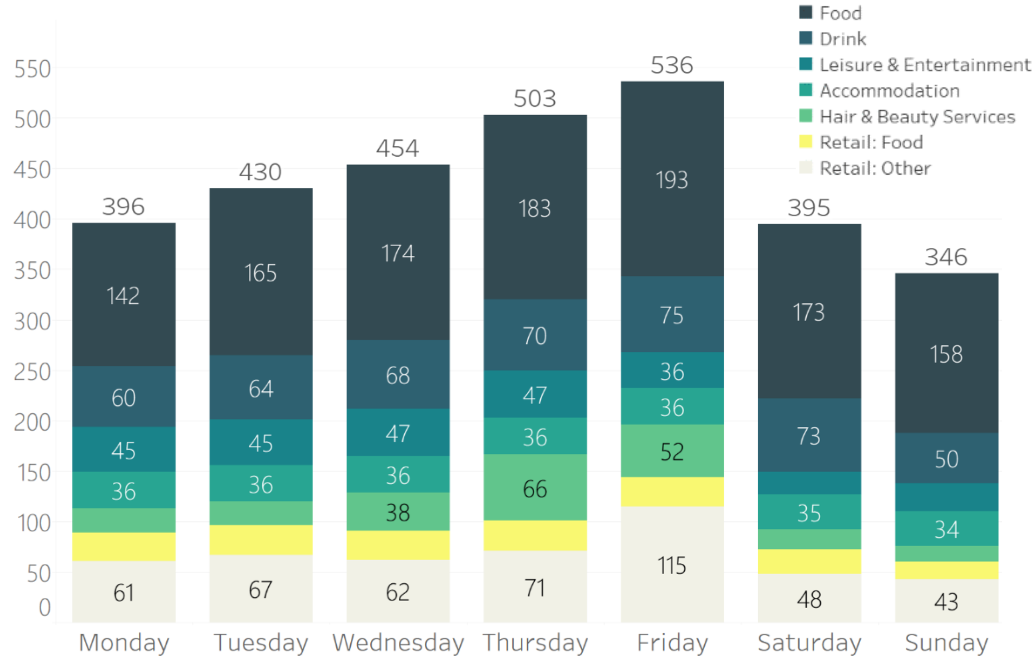



*Figure 18: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 51% | 26% | 7% | 9% |
| Tuesday | 56% | 28% | 8% | 9% |
| Wednesday | 60% | 29% | 8% | 9% |
| Thursday | 61% | 31% | 9% | 9% |
| Friday | 63% | 34% | 12% | 8% |
| Saturday | 55% | 32% | 13% | 7% |
| Sunday | 47% | 27% | 7% | 9% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*

*Figure 17: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 18% | 7% | 4% | 4% |
| Tuesday | 19% | 7% | 4% | 4% |
| Wednesday | 20% | 7% | 4% | 4% |
| Thursday | 26% | 7% | 4% | 4% |
| Friday | 30% | 7% | 4% | 4% |
| Saturday | 14% | 7% | 4% | 4% |
| Sunday | 12% | 7% | 4% | 4% |

# Hobart, TAS

A waterfront city with a rich history, Hobart is the capital of the island state of Tasmania. From Kunanyi / Mt Wellington to the Derwent River, the natural landscape shapes Hobart. It has a reputation for excellent food and wines and spirits from local producers; arts and culture; and local artisans and markets. The Hobart community vision statement sums up the connection between the natural environment and how it shapes Hobart life.

## Hobart's City Initiatives

The Council has undertaken a number of initiatives to support the NTE sector and to encourage people to come into the city.

### Wellington Court Street Party

The City of Hobart transformed Wellington Court into a night-time entertainment venue on Friday 19 May 2023. The team conducted the event as a trial to ascertain whether Wellington Court could be a suitable venue for night-time activations and activities. The evening activation, or 'Street Party,' was part of the City of Hobart's Mainstreet Week of celebrations (15-19 of May), which included a program of live entertainment happening between 12-2pm daily. The night time event also featured the introduction of the 'booze bus' (a bar on wheels) and a food truck to the space. The surrounding businesses were encouraged to extend their trading hours to take advantage of the increased foot traffic during the event. Many businesses decided to take the opportunity to extend their trading hours to accommodate the increased number of people in the area. This week-long activation included the installation of a temporary stage structure and fencing, a sound system to support live entertainment and the introduction of festoon lighting.

### The 9-5 Campaign

This campaign was developed by the Council's City Economy team to encourage city workers and students to come back into the city and support local businesses. The 9-5 campaign encouraged those coming into the city to 'make their most out of their 9-5, for example, shopping on their lunch break or meeting friends for a knock-off drink or dinner after work.  This campaign was developed as a business support measure, partly in response to a significant decline of visitor numbers in the CBD due to the pandemic.

### Light Up The Lane

Light Up The Lane is run by the Youth Arts & Recreation Centre (managed and run by the City of Hobart). It is an all ages, family friendly event which showcases the talents of young people including artwork via large scale projections, live music, dance, creative goods and fashion plus fun interactive activities.

The drug and alcohol-free event is held in Mathers and Criterion Lane in the city.

### Dark Mofo

The City of Hobart sponsors Dark Mofo every year, providing both funding, equipment and venue support. The festival celebrates the longest night of darkness on the southern winter solstice and involves a spectacle of art, light, music and food. The event attracts a huge influx of visitors to the city, with most of the events and activities taking place after dark.

## HOBART'S NTE PERFORMANCE

In June 2022, establishments in Hobart's Core NTE had increased 5% to 644, surpassing pre-pandemic levels by 17%, – albeit at a marginally slower pace than the overall Australian Core NTE (18%). Hobart's NTE represents 26% of Tasmania's Core NTE businesses and 31% of the state's Core NTE employment located in the City of Hobart LGA. These businesses generated 28% of the state's Core NTE sales turnover in 2021/22.

Employment in Hobart's Core NTE declined by -10% to 7,085 jobs in 2022, leaving it1% above pre-pandemic levels. Conversely, Hobart's Core NTE saw a 10% rise in sales turnover, reaching $856m in 2022, surpassing pre-pandemic levels by 4%.

Hobart's Core NTE sector accounted for a relatively larger share of establishments (9%), employment (12%), and turnover (5%) compared to Australia, reflecting its significant contribution to the city's economy.

### SUB-SECTORAL PERFORMANCE

The number of establishments in the Leisure & Entertainment sub-sector increased by 5% in 2021/22, totalling 148 in 2022. Turnover grew impressively by 10%, reaching $194m, driven by increases in *Creative and Performing Arts (+22%/+$20m)*, however, employment in this sub-sector slightly declined (-3% / -45) to 1,190 employees.

The Food sub-sector also showed similar trends, with a 5% increase in the number of establishments, totalling 436 in 2022 and an 11% increase in sales turnover to $562m. Employment, however, decreased by -11%, with 630 fewer employees, driven primarily by job losses in *Cafes and Restaurants* (-12%/-570).

The number of establishments in the Drink sub-sector remained stable (a minor 2% increase), whereas employment declined 14%, primarily in Pubs, Taverns and Bars. Sales turnover remained consistent at $100m.

In contrast, the Retail and Accommodation sub-sectors faced challenges over the year. The number of establishments declined (-6% and -10% respectively), as did employment (-18% and -21% respectively). Retail sales turnover grew 10% to $1,570m in 2021/22, while Accommodation turnover fell (-3%) to $207m.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 644<br>+5% | 9% |
| Employment | 7,085<br>-10% | 14% |
| Sales Turnover | $856m<br>+10% | 5% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 60<br>+2% | 9% |
| Entertainment | 148<br>+5% | 27% |
| Food | 436<br>+5% | 64% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 310 | -6% |
| Accommodation | 73 | -10% |

## HOBART'S BUSINESS CLUSTERING

Figure 19 shows the location and concentration of Hobart's Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm of July 2023.

The majority of consumer facing evening activity can be found to the east of the LGA around the city centre, particularly:

- Within the CBD and the waterfront
- Along Elizabeth Street in North Hobart
- Around Salamaca Market
- Across Sandy Bay retail centre; and
- Dotted around New Town.

A more detailed map can be viewed online here.

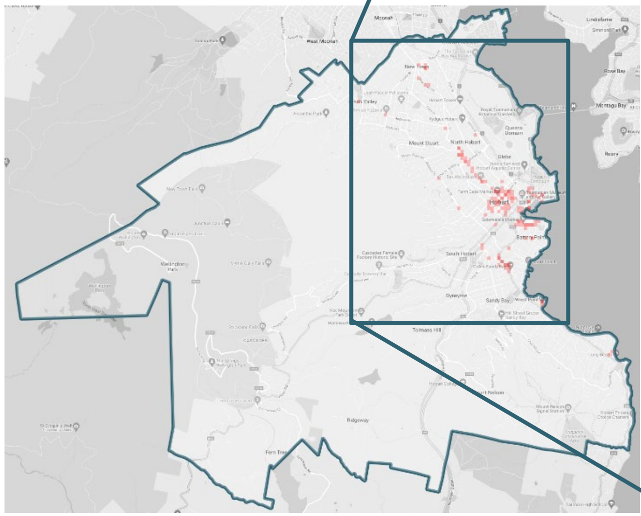
*See 'Using supplementary maps' (Appendix p74) for guidance.*

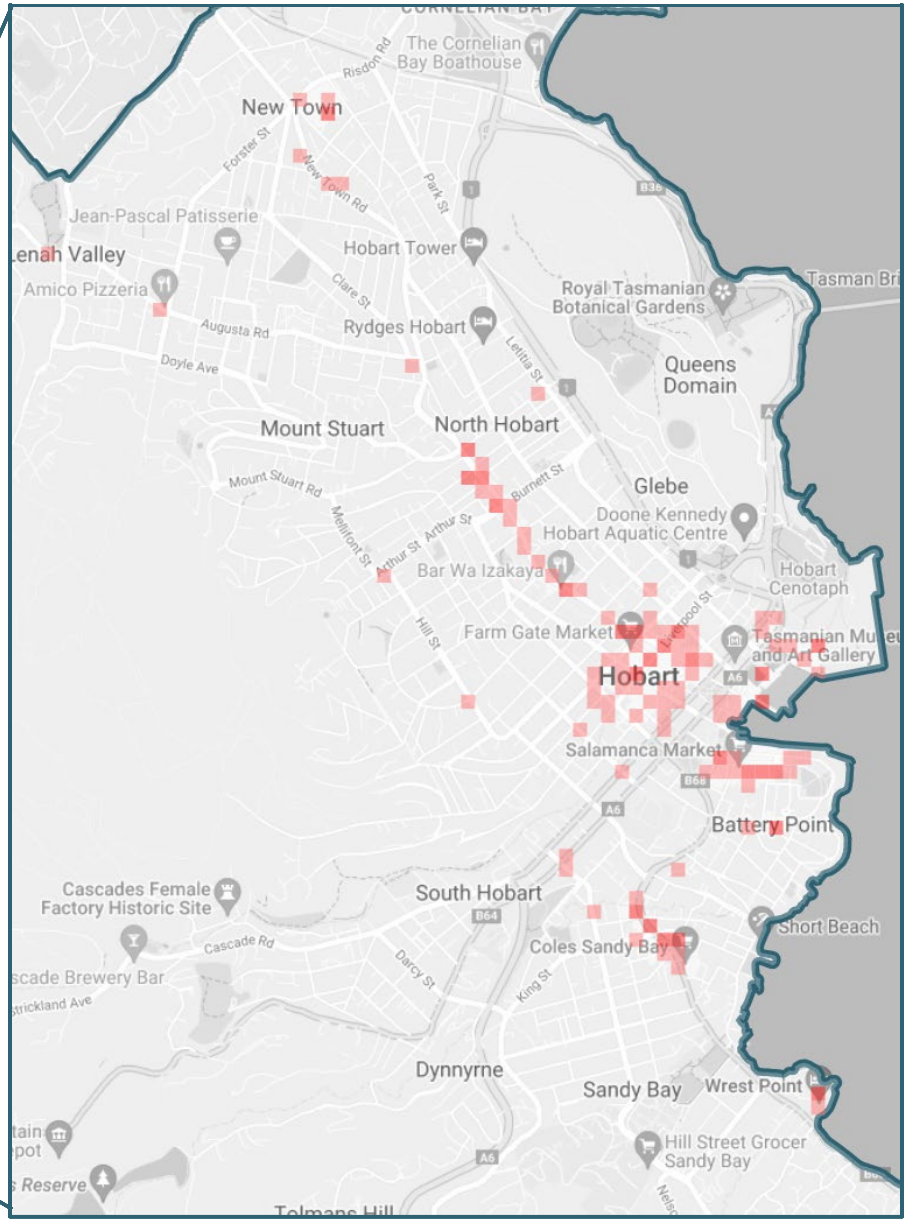
*Figure 19: Hobart LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*

Number of businesses trading per hectare (100m x 100m)

- Less than 2
- 2 - 4
- 5 - 10
- More than 10

LGA boundary





# HOBART'S TRADING PATTERNS

Following a similar pattern to Sydney, Thursday night has the highest number of consumer-facing businesses open in the City of Hobart. Unlike many other cities, however, this is driven by a greater number of businesses of all types opening on Thursday, not just retail businesses.

The pattern of trading hours in Hobart across the week is smoother than in many other cities, with the difference between the weekdays and weekends less pronounced, providing a diverse mix of activity on every day of the week.

*Figure 20: Number of business **open at night** (at some point 6pm and 6am)*

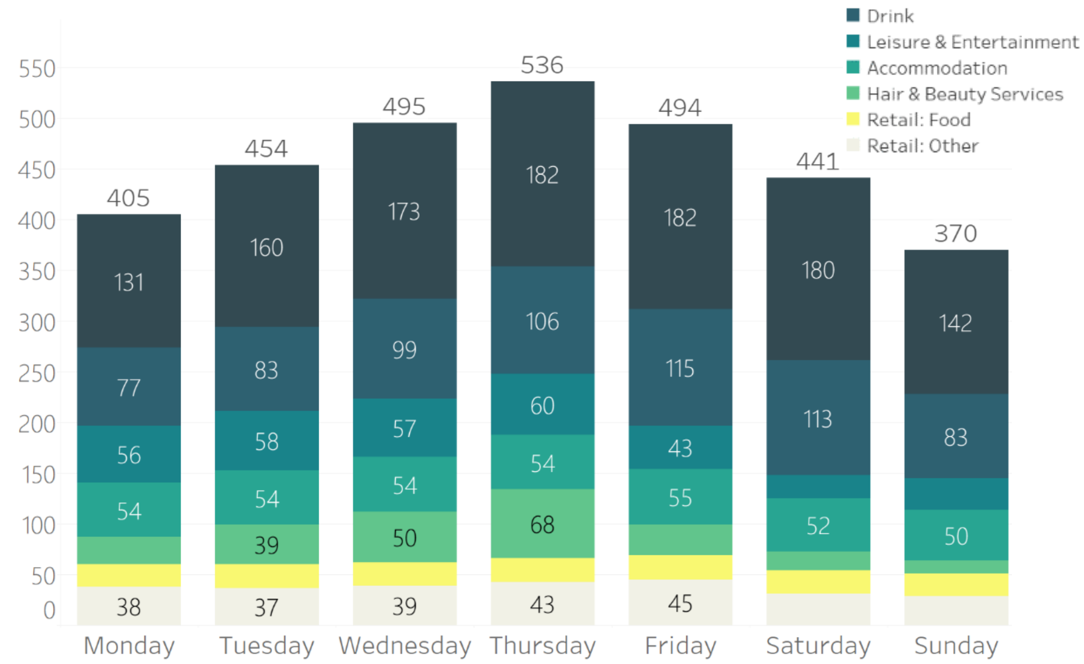



*Figure 22: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 43% | 20% | 4% | 6% |
| Tuesday | 50% | 23% | 4% | 6% |
| Wednesday | 54% | 27% | 5% | 6% |
| Thursday | 58% | 28% | 6% | 7% |
| Friday | 57% | 36% | 10% | 5% |
| Saturday | 52% | 35% | 10% | 5% |
| Sunday | 41% | 20% | 5% | 6% |

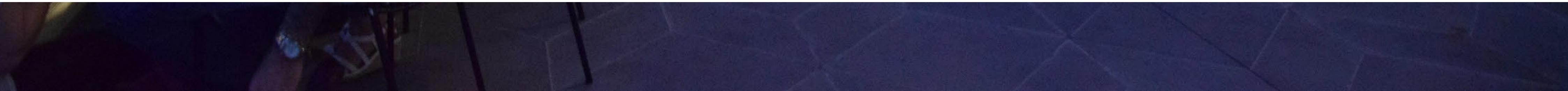
*Figure 21: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 14% | 5% | 3% | 3% |
| Tuesday | 16% | 5% | 3% | 3% |
| Wednesday | 18% | 5% | 3% | 3% |
| Thursday | 22% | 5% | 3% | 3% |
| Friday | 16% | 5% | 3% | 3% |
| Saturday | 12% | 5% | 3% | 3% |
| Sunday | 10% | 4% | 3% | 3% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*


# Maroondah, VIC

Situated to the east of Melbourne's CBD, Maroondah is considered the gateway to the Yarra Valley, with key centres in Ringwood and Croydon. Ringwood's Eastland Shopping Centre hosts extensive dining experiences and a 4.5-star hotel. The transformation of this family orientated destination has acted as a catalyst for the regeneration of the area.



## Maroondah's City Initiatives

During 2021/22, Maroondah City Council has continued to support businesses, including NTE businesses, through a diverse range of assistance programs delivered directly or in partnership with other organisations.

Ringwood East and Croydon South received funding support from the Victorian Government's Neighbourhood Activity Centre Renewal Fund to deliver a range of place activation projects. Infrastructure and amenity upgrades, and a program of arts activations were undertaken in both centres, with the support of local community, organisations and traders. The Ringwood East Place Activation Project was a finalist in the 2021 Mainstreet Australia Awards.

A range of support for businesses to expand outdoor dining opportunities were delivered between December 2021 and May 2022. Council secured $575,000 funding through the Victorian Government's Outdoor Activation Fund which provided support for 84 local hospitality businesses. An extensive program of arts and cultural events were undertaken across Maroondah between December 2021 and May 2022, including the Ringwood Town Square Neon Lights; Wyreena Cultural Activations; Gluttony Festival in Croydon and Music in Maroondah. Five 'pop-up' parks were also installed in Ringwood, Croydon, Croydon North and Bayswater North to provide additional seating for the community and to improve the appearance of local shopping centres. Other projects included installation of bollards and planter boxes at Heathmont Village and outdoor dining and infrastructure upgrades in Croydon.

An assessment of nine shopping centres was undertaken to consider amenities, access and transport, to inform future planning and investment. The review also considered post-pandemic economic recovery planning considerations, identifying short term actions to improve amenities and activate all 31 shopping centres across Maroondah. In response to the review, infrastructure upgrades have commenced to enhance the amenity of a range of shopping centres.

The Maroondah Liquor Accord: A joint initiative between licensees, Victoria Police, Council and the Victorian Commission for Gambling and Liquor Regulation. Established in 2015, the Accord recommenced in May 2022 (following a pandemic hiatus) attracting 50-80 attendees twice a year for networking and training opportunities.

Council's Economic Development Team provides a range of services as follows:

- Concierge service for businesses navigating Council's permit process
- www.bizhubmaroondah.com.au - Council's dedicated website resource for business
- BizHub Coworking - grow your business in an entrepreneurial and collaborative environment
- Business development workshops, skills training and assistance programs
- 1:1 mentoring sessions with professional business expert
- Promotional and networking opportunities
- Online business directory - local businesses can register their details for free
- Email updates containing current news, upcoming training, events and tips for your business.

## MAROONDAH'S NTE PERFORMANCE

In 2022, the number of establishments in Maroondah's Core NTE grew by 8%, to 482 - a slightly faster pace than the national Core NTE average (+7%). Employment was stable at 2,920 jobs in 2022 compared to 2021, although remained 8% below pre-pandemic levels (2018/19). In comparison, Australia's Core NTE employment modestly increased 1% and remained 6% behind pre-pandemic levels.

While employment remained steady, Maroondah's Core NTE turnover increased 12% to $365m in 2022, falling slightly short of pre-pandemic levels by 4%. These trends indicate resilience but also remaining challenges to achieving full recovery.

The Core NTE sector accounted for 5% of all Maroondah's establishments, 5% of employment, and 2% of sales turnover in 2022, reflecting a smaller share of the local economy compared to many of the places reviewed in this report.

### SUB-SECTORAL PERFORMANCE

Leisure & Entertainment stands out due to its robust growth in 2022, whereby the number of establishments surged 21% to 156 – driven primarily by *Creative and Performing Arts (+17/+27%)*. Sales turnover showed equally impressive growth, increasing 26% to $114m. Despite these gains, employment fell 11%.

The Food sub-sector demonstrated resilience with increased in the number of establishments (6%) and employment (7%) and a notable 13% rise in sales turnover to $222m. Much of this growth came from *Cafes and Restaurants*, highlighting its growing significance in the area.

Conversely, in the Drink sub-sector, the number of establishments decreased -31%, employment fell substantially by -20% and sales turnover dropped -26%, reflecting the changing NTE landscape in Maroondah.

Maroondah gained 29 Retail businesses in 2021/22 (+8%). While the sub-sector employed slightly fewer people than before the pandemic (-1%). These businesses generated 31% more sales turnover in 2021/22 than in 2018/19.

The number of Accommodation businesses remained stable at 21 in 2021/22. Turnover increased 7% to $10m, whereas employment fell -9% (c10 employees).

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 482<br>+8% | 5% |
| Employment | 2,920<br>+0% | 5% |
| Sales Turnover | $365m<br>+12% | 2% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 20<br>-31% | 4% |
| Entertainment | 156<br>+21% | 32% |
| Food | 306<br>+6% | 64% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 412 | +8% |
| Accommodation | 21 | +0% |

## MAROONDAH'S BUSINESS CLUSTERING

Figure 23 shows the location and concentration of Maroondah's Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm of July 2023.

Maroondah's primary consumer-facing night time precinct in Ringwood, surrounds the Eastland Shopping Centre.

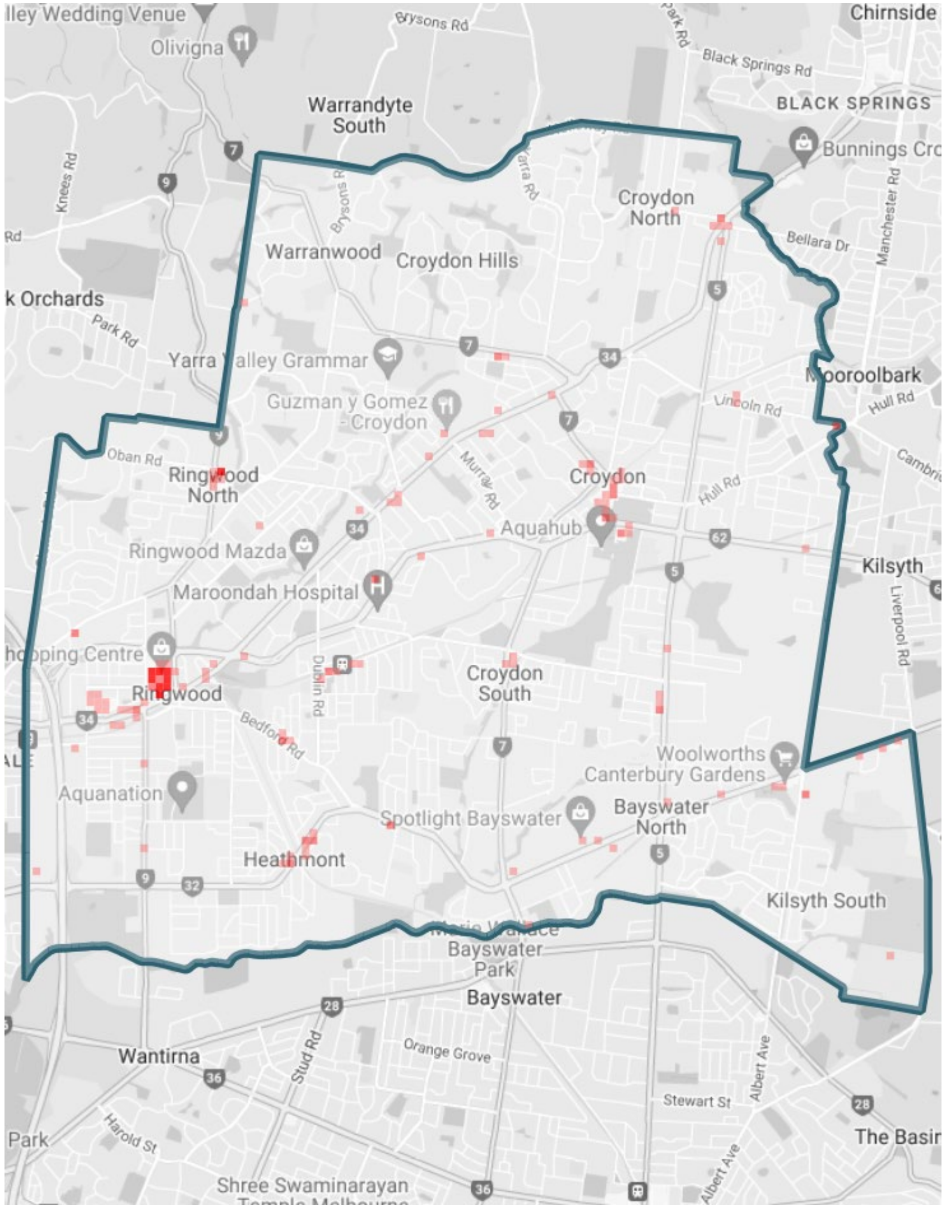
Other clusters of activity can be seen around the following centres:

- Ringwood North
- Heathmont
- Croydon; and
- Croydon North.

A more detailed map can be viewed online [here.](here)

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 23: Maroondah LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*




Number of businesses trading per hectare (100m x 100m)

Less than 2
2 - 4
5 - 10
More than 10

LGA boundary

# MAROONDAH'S TRADING PATTERNS

Maroondah's busiest nights of the week in terms of the number of businesses trading are Thursday night followed by Friday night. A higher proportion of Retail, Hair and Beauty Services businesses trade on these nights of the week (47% and 39% respectively) compared to other nights of the week.

Saturdays and Sundays are much quieter, with less than half the number of businesses trading on Sunday nights (318), when compared to Thursday nights (665), suggesting the potential for increased evening trading on weekends, depending on consumer demand.

*Figure 24: Number of business **open at night** (at some point 6pm and 6am)*

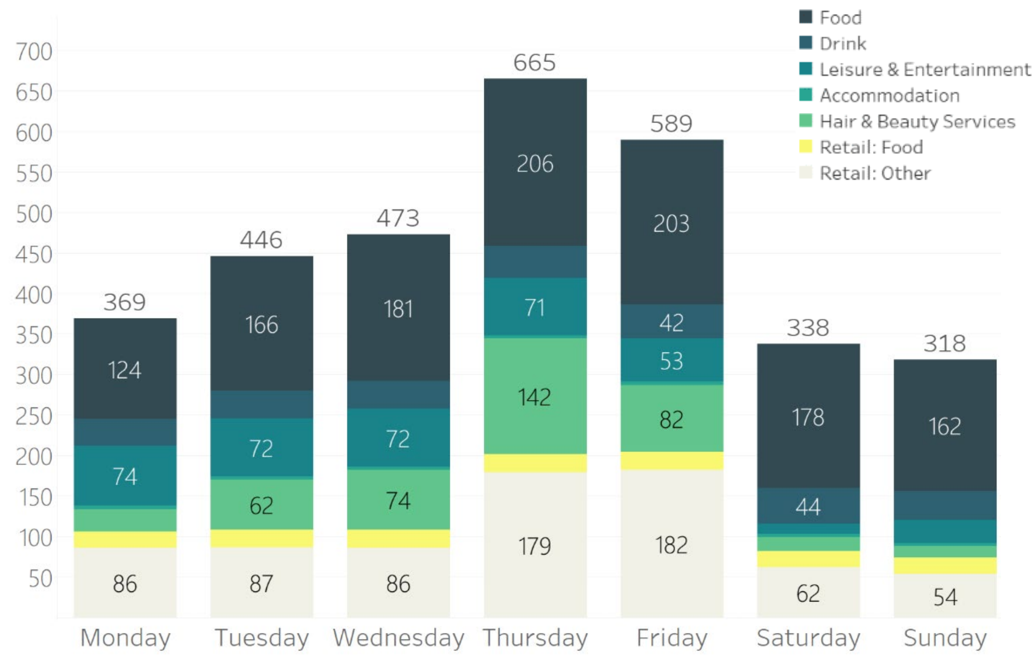



*Figure 26: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 49% | 18% | 5% | 9% |
| Tuesday | 58% | 21% | 5% | 10% |
| Wednesday | 61% | 23% | 5% | 10% |
| Thursday | 68% | 26% | 5% | 10% |
| Friday | 65% | 30% | 9% | 6% |
| Saturday | 51% | 30% | 9% | 5% |
| Sunday | 45% | 20% | 5% | 10% |

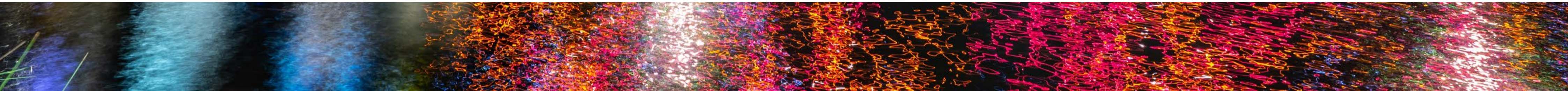
*Figure 25: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 18% | 6% | 3% | 4% |
| Tuesday | 23% | 7% | 4% | 5% |
| Wednesday | 25% | 7% | 4% | 5% |
| Thursday | 47% | 7% | 3% | 4% |
| Friday | 39% | 7% | 3% | 4% |
| Saturday | 13% | 6% | 4% | 4% |
| Sunday | 12% | 6% | 3% | 4% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*

# Melbourne, VIC

Victoria's capital city is renowned for its laneways, arcades, coffee culture and extensive arts and cultural scene. The city is also known as Australia's sporting capital, hosting a wide array of key sporting events across the year. In 2022, the Economist Intelligence Unit ranked Melbourne as Australia's most liveable city.



## MELBOURNE'S CITY INITIATIVES

Melbourne emerged in 2021/2022 with a unique opportunity to serve as both a lively entertainment hub and a thriving business centre. Melbourne's objective was not only to restore economic strength, but to make the city flourish, providing an appealing experience for city workers, students, residents, and visitors alike. To realise this vision, the City of Melbourne orchestrated a series of events, activations, and marketing campaigns aimed at encouraging more people to return to the city, with a significant focus on the night time economy.

The City of Melbourne and Victorian Government partnered to deliver the $100m Melbourne City Recovery Fund and $200m Melbourne City Revitalisation Fund to reactivate the city. A key initiative with a night time focus was the Melbourne Money scheme, offering patrons discounts on dining out. The scheme provided $98m in economic stimulus to City of Melbourne hospitality venues. Another example is the City Activation Grants Program, bringing activations to the city across the day and night between 1 January – 30 June 2022.

Melbourne's premier events – Melbourne Fashion Week, Melbourne Music Week, Christmas and New Year's Eve celebrations, and the Summer Drone Show – attracted visitors day and night. Notably, Moomba in 2022 had approximately 1.4m people in attendance, with the nightly Moomba Fireworks serving as a major attraction.

Other key City of Melbourne programs that supported the night time economy during this period included Business Concierge, Precinct Activation Fund, Shopfront Activation Program and Shop the City activation. Marketing campaigns 'Let's Melbourne Again' and 'FOMO' encouraged locals to rediscover the city's night charm.

The City of Melbourne's Night Time Economy Advisory Committee (NTEAC) was established in 2021, with the purpose of providing a collaborative platform for engagement and consultation between Council and the night time economy sector. It allowed City of Melbourne to harness strategic advice and direction from relevant industry representatives from hospitality, arts and entertainment, as well as government and academia. The NTEAC was formed during the second year of the pandemic, at a time when a prioritisation of the needs of the night time economy was crucial to Melbourne's recovery. Over the 2021-2022 financial year, key achievements of the NTEAC included:

- Advocating for a health pass system to safely reopen Melbourne, following pandemic restrictions.
- Creation of a collective vision statement and recommendations for Melbourne's night time economy.
- Advising City of Melbourne on several initiatives, including the Dusk till Dawn Activation Grants Program, Melbourne Money and Project Night Justice.

The City of Melbourne Council has since moved to a new phase of the night time economy program. The NTEAC came to a close on 30 June 2023 and Council will instead facilitate a series of deep dive roundtable discussions. In 2023, City of Melbourne will establish a new City Economy Advisory Committee, bringing key business, industry and stakeholder groups together to boost Melbourne's appeal as an all-day destination.

## Melbourne's NTE Performance

Melbourne's Core NTE demonstrated further resilience and recovery in 2022. The sector's establishment base expanded by 7% in 2022, to 3,080 establishments, surpassing pre-pandemic levels by 21%. Employment, however, declined slightly (-2%) on 2021 figures, contracting to 30,555 people and leaving the sector 5% below pre-pandemic levels. While sales turnover achieved strong growth in 2022 (+8%), reaching $3.63bn, the sector remained slightly behind (-2%) the pre-pandemic baseline.

Melbourne's Core NTE accounted for 7% of establishments, 9% of employment, and 4% of sales turnover in 2022; this is higher than the national average and highlights the NTE's substantial contribution to the city's economy, particularly in employment.

### Sub-sectoral performance

After being significantly impacted by the pandemic, Leisure & Entertainment experienced substantial recovery by 2022. The number of establishments surged by 15%, reaching 700 in 2022, and the sub-sector recorded an impressive 11% increase in sales turnover, reaching $845m. However, despite these gains, employment in the sub-sector fell notably by -18%, with 1,010 fewer employees (mostly in *Creative and Performing Arts*).

The Food sub-sector has recovered well, with sales turnover growing 8% to $2.4bn, which is above pre-pandemic levels. Employment increased 2% in 2022, leaving the sub-sector just 1% below pre-pandemic levels.

Melbourne has the third highest number of Drink businesses of the 88 local government areas analysed and this remained stable in 2022 with no change in the number of establishments, a minor change to employment and a modest 7% increase in turnover to $335m.

By June 2022, Melbourne's Retail sub-sector had grown by 24% (101 businesses) compared to June 2019, and employment had increased by 4%. In the 2021/22 financial year, these businesses generated 36% more sales turnover than in 2018/19.

The number of Accommodation businesses rose by 10% in the year to June 2022, representing a 30% increase compared to June 2019.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 3,080<br>+7% | 7% |
| Employment | 30,555<br>-2% | 10% |
| Sales Turnover | $3,629m<br>+8% | 4% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 234<br>0% | 8% |
| Entertainment | 700<br>+15% | 23% |
| Food | 2,146<br>+5% | 70% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 1,521 | +7% |
| Accommodation | 271 | +10% |

## MELBOURNE'S BUSINESS CLUSTERING

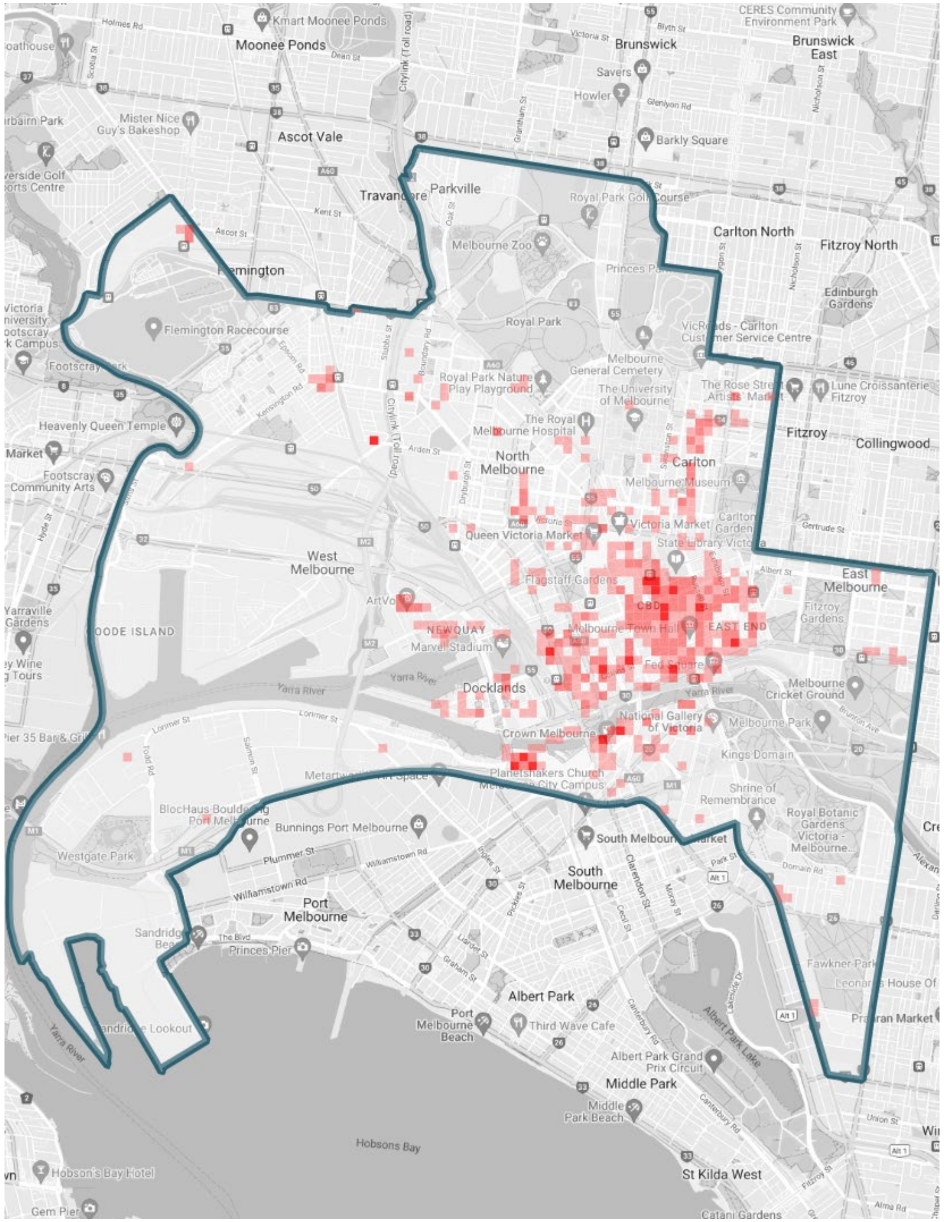
Figure 27 shows the location and concentration of Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm of July 2023. The City of Melbourne's consumer-facing evening businesses are most active in the CBD, but there are clusters of activity in surrounding areas, such as:

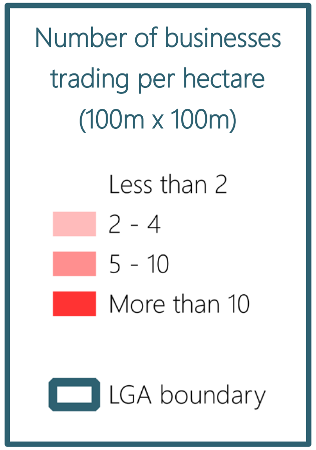
- Southbank
- The Docklands and South Wharf
- Lygon Street
- Errol Street; and
- Kensington.

A more detailed map can be viewed online [here.](#)

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 27: Melbourne LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*



## MELBOURNE'S TRADING PATTERNS

In the City of Melbourne LGA, Friday has the highest number of consumer-facing businesses open at night. The number of businesses open at night gradually increases on each day of the week and then trails off on Saturday and Sunday – particularly in terms of retail businesses.

Melbourne has some of the highest rates of evening (6-9pm) Retail, Hair and Beauty Services trading hours of all cities examined, demonstrating an excellent diversity of activity. The exception is Thursday nights, when Penrith (54%), Sydney (50%) and Adelaide (50%) have higher proportions of these businesses trading.

*Figure 28: Number of business **open at night** (at some point 6pm and 6am)*

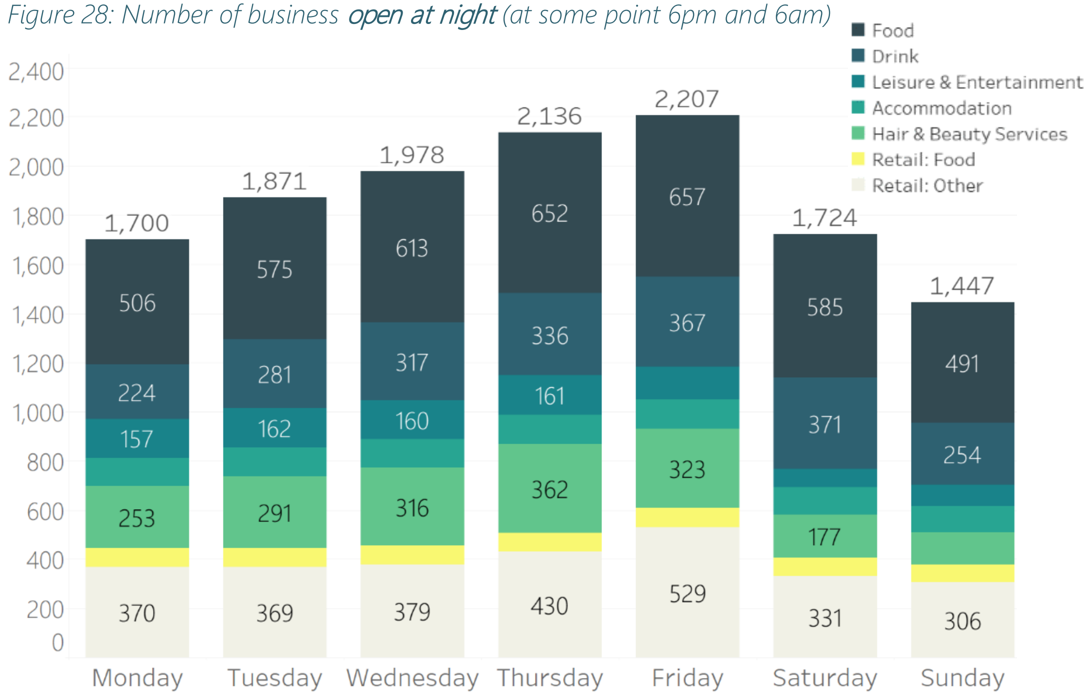



*Figure 30: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 45% | 28% | 8% | 7% |
| Tuesday | 52% | 33% | 9% | 7% |
| Wednesday | 56% | 37% | 9% | 7% |
| Thursday | 59% | 39% | 11% | 7% |
| Friday | 59% | 44% | 16% | 7% |
| Saturday | 52% | 43% | 17% | 8% |
| Sunday | 41% | 30% | 8% | 7% |

*Figure 29: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 37% | 13% | 8% | 8% |
| Tuesday | 39% | 13% | 8% | 8% |
| Wednesday | 41% | 14% | 8% | 8% |
| Thursday | 46% | 14% | 8% | 8% |
| Friday | 49% | 14% | 8% | 8% |
| Saturday | 31% | 13% | 8% | 7% |
| Sunday | 26% | 11% | 8% | 8% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*

# Newcastle, NSW

Newcastle has a rich character and history combined with a selection of beautiful beaches. Situated at the mouth of the Hunter River, it is home to the largest coal-mining port in the world. The Newcastle After Dark strategy highlights the city's burgeoning creative and dining scene.

## Newcastle's City Initiatives

City of Newcastle is committed to leading the development of a safe and vibrant night-time economy. In addition to the city's night time strategy Newcastle After Dark, the City of Newcastle delivers multiple different programs to showcase the city at night.

Key strategic priorities include:

- Strategic Alcohol Management - To prevent and mitigate the harmful and anti-social impacts of irresponsible supply and consumption of alcohol.
- Night-time Economic Development - To encourage and enable a sustainable, safe and diverse night-time economy.
- Night-time Design - To design, implement and maintain safe, attractive and engaging public night-time spaces.
- Cultural Participation and Activation - To enable and support the city after dark as a site of diverse participation in cultural production and consumption.
- Regulation Planning and Licensing - To establish and promote a policy and planning framework that enables and supports the Newcastle After Dark vision.
- Research and Evaluation - To implement research and evaluation programs for guiding innovation and monitoring outcomes.

Visitors and locals alike can now plan their ultimate night out with the introduction of a specific night-time section to the City of Newcastle app. Users can navigate to the night-time layer to view a map of 'open now' venues, upcoming events at night, and even follow along with curated night-time experience trails via the app. The new functionality delivers on actions in the Newcastle After Dark Strategy relating to city wayfinding, and providing promotional information via digital platforms.

Local businesses were again afforded the opportunity to trial new offerings and experiences as the City continued its major events business support program in conjunction with Newcastle's premier cultural event, the New Annual festival. The business support program provided subsidies to incentivise the provision of dedicated offers associated with the festival. Businesses leveraged the lower risk environment to explore new or unique offerings in conjunction with the City's additional patronage contributing to a whole of city festival atmosphere.

City of Newcastle's Night Galleries got a glow-up for Sydney WorldPride with a local Queer community organisation partnering with the Newcastle Art Gallery to curate a selection of sounds, artworks, and augmented reality (AR) which speak to the dichotomy of visible and invisible queer experience.

The City of Newcastle participated in the state government-led Stage Two Liquor Licence Trial where conditions restricting the types of drinks and when they can be served, 1:00am and 1:30am patron lockout restrictions, and general liquor trading hours were relaxed and assessed for 21 venues. The trial resulted in positive economic impact, with the period recording a 40% increase in total spending on entertainment and dining across the LGA compared to a 2019 baseline. Most participating venues indicated that the relaxed conditions positively impacted their patronage, business turnover and employment opportunities.

## NEWCASTLE'S NTE PERFORMANCE

In 2022, Newcastle's Core NTE sector expanded by 4%, totalling 1,019 establishments.

The Core NTE represented 7% of all establishments, 12% of employment, and 5% of sales turnover in 2022. This is higher than the national average (5% / 7% / 3% resp.), showing the NTE's substantial contribution to the Newcastle economy – particularly in employment.

Core NTE employment in Newcastle reached 13,090 jobs in 2022 representing a 4% increase on 2021 and placing the sector just 1% below pre-pandemic levels, which is stronger than the national average (still 6% below pre-pandemic levels). Sales turnover grew substantially in 2022 by 11% to $1.72bn, placing Newcastle 8% above pre-pandemic levels.

### SUB-SECTORAL PERFORMANCE

Like other LGAs, the Leisure & Entertainment sub-sector grew substantially in 2022 in terms of the number of establishments (+8%) and particularly sales turnover (+24%), which reached $641m demonstrating recovery from the impacts of the pandemic. This growth was primarily in *Creative and Performing Arts (+33%)* and *Sports and Physical Recreation (+33%)*. Employment in this sub-sector grew by a modest 4% to 4,245 employees.

The Drink and Food sub-sectors remained stable. The number of establishments increased by 2% in 2022 to 114 and 581 establishments respectively. Employment rose in both sub-sectors by 4%. Drink sales turnover increased 8% to $246m, while Food turnover increased 4% to $838m.

The Accommodation sector displayed notable growth. The number of establishments increased 12% to 77 in 2022, employment grew (+13%), and sales turnover increased substantially by 25% to $179m, placing it 3% above 2018/19 levels.

The number of Retail establishments increased by 1%, totalling 602 in 2022. Grocery retail fell 16% (-24), while non-grocery retail increased 6% (+29). Turnover grew by 8% to $1,579m, while employment grew 6% to 4,215 employees, mostly driven non-grocery retail. Employment in grocery retail remained relatively stable.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 1,019<br>+4% | 7% |
| Employment | 13,090<br>+4% | 12% |
| Sales Turnover | $1,724m<br>+11% | 5% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 114<br>+2% | 11% |
| Entertainment | 324<br>+8% | 32% |
| Food | 581<br>+2% | 57% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 602 | +1% |
| Accommodation | 77 | +12% |

## NEWCASTLE'S BUSINESS CLUSTERING

Figure 31 shows the location and concentration of Newcastle's Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm as of July 2023. The majority of consumer facing evening businesses can be found to the south east of the LGA, with clusters of activity visible:

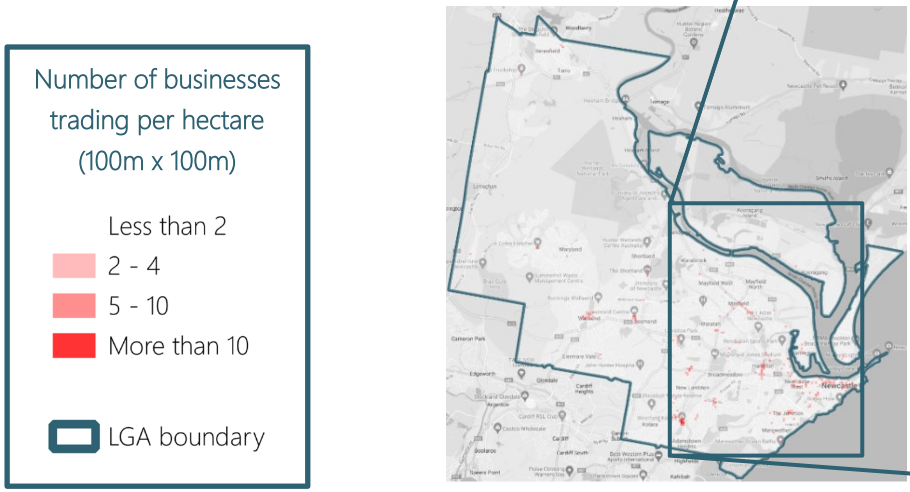
- In the precincts of Newcastle West, Honeysuckle, Civic-CBD, Darby St, Newcastle East and the Junction.
- Along Beaumont Street in Hamilton
- Around Westfield Kotara
- Wallsend; and
- Maitland Road, Mayfield

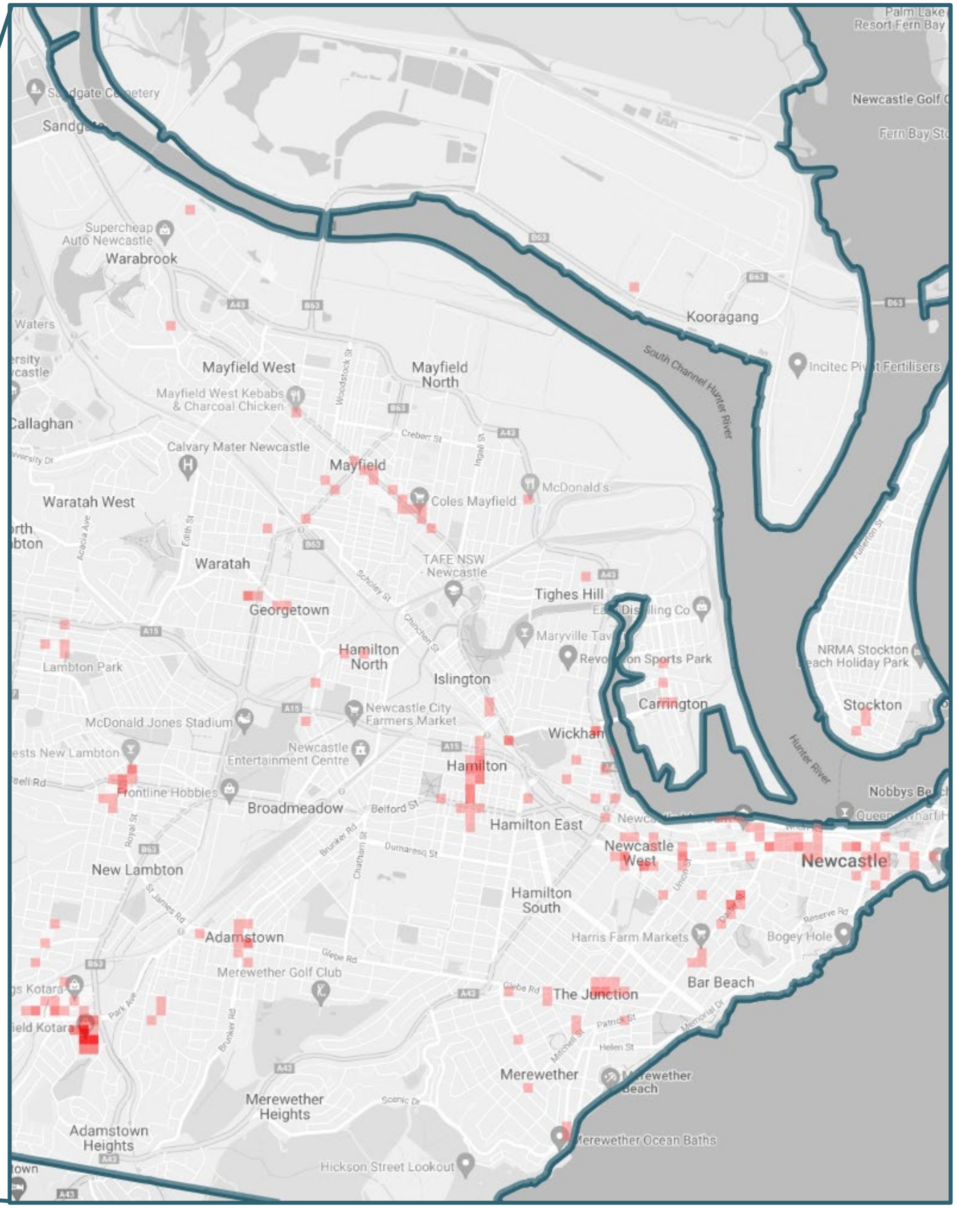
Pockets of activity can also be found in areas such as Jesmond, the Junction and Adamstown.

A more detailed map can be viewed online here.

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 31: Newcastle LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*



# Newcastle's trading patterns

In the City of Newcastle LGA, Thursday has the highest number of businesses trading at night. As per many other cities examined in this report, this is due to late evening trading of Retail, Hair and Beauty Services businesses and other businesses such as Food and Drink opening later. Like all other cities examined Core NTE businesses stay open later on Friday and Saturday nights.

Sunday is the night of the week with the fewest businesses trading, followed by Saturday and Monday.

*Figure 32: Number of business **open at night** (at some point 6pm and 6am)*

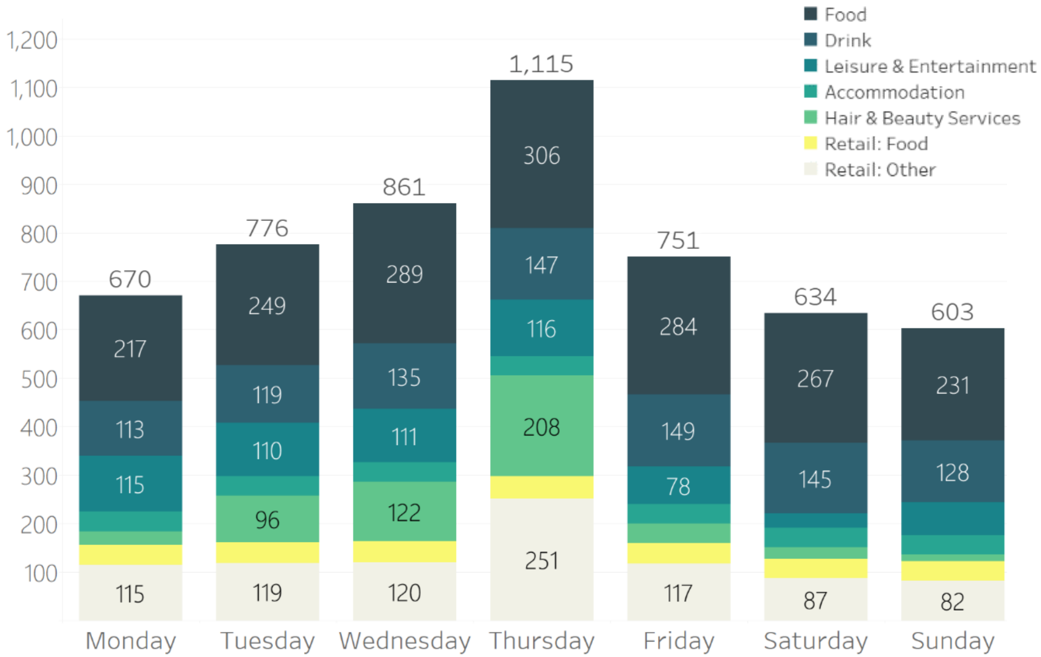



*Figure 34: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 49% | 20% | 5% | 11% |
| Tuesday | 52% | 20% | 5% | 12% |
| Wednesday | 59% | 24% | 6% | 11% |
| Thursday | 62% | 25% | 7% | 12% |
| Friday | 58% | 29% | 8% | 5% |
| Saturday | 50% | 28% | 8% | 4% |
| Sunday | 41% | 20% | 4% | 11% |

*Figure 33: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 16% | 7% | 3% | 4% |
| Tuesday | 22% | 7% | 3% | 4% |
| Wednesday | 25% | 7% | 3% | 4% |
| Thursday | 44% | 7% | 3% | 4% |
| Friday | 17% | 7% | 4% | 3% |
| Saturday | 13% | 7% | 3% | 3% |
| Sunday | 11% | 5% | 3% | 4% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*

# Parramatta, NSW

Parramatta is a major metropolitan centre at the core of the Central River City. It is a city with a rich history and a diverse community, as well as world-class health, education and research institutions and a thriving commercial centre.

# PARRAMATTA'S CITY INITIATIVES

City of Parramatta is continuing the high-level strategic goals laid out within the Parramatta Night City Framework 2020-2024, which aims to harness opportunities presented by growth and changing demographics, to diversify night-time offerings and meet community needs and aspirations.

The Night City Framework 2020-2024 has a range of goals and actions for the cities Night Time Economy based on six focus areas:

- Planning for a future 24-hour CBD and late trading centres
- A night city of diverse businesses, leisure, and culture
- A night city supported by infrastructure
- Promoting Parramatta as a thriving night-time destination
- Keeping the city safe and engaging its community
- Parramatta as a leading night city.

To support these goals, City of Parramatta has developed, and is continuing the following initiatives:

### Night Time Economy Diversification Grants

These grants formerly known as Night Time Activation Grants, total $50,000 per year in funding supporting the diversification of night time offerings across the Parramatta LGA. The funding covers support for infrastructure such as lighting and equipment, and events and activations including artist fees. Since the beginning of this program, 18 projects have been supported, equating to $150,000 matched investment.

### Purple Flag Accreditation

In 2022 City of Parramatta started the process of certification for the Purple Flag initiative, which City of Parramatta attained in June 2023, and which responds directly to points 4,5,6 of the Night City Framework. Purple Flag is an international accreditation scheme that aims to identify and recognise areas offering a diverse, vibrant and safe night out. More about Purple Flag accreditation can be found here.

### Cultural Infrastructure

Opening in 2022, Phive Parramatta, the new community, cultural and civic hub, located in the heart of Parramatta's CBD, supports the city's already robust arts and cultural program offered by the Riverside Theatres, and National Theatre of Parramatta. Parramatta is rapidly growing into an International Cultural Hub (thanks to significant investment by the state government) via Powerhouse Museum, Riverside Redevelopment and a business case exploring options for the Roxy Theatre. City of Parramatta continues its celebrated Laneways Festival which includes contributions by the Parramatta Artist Studios and local musicians.

### Visitor Economy and Night-time Economy

While 2021 through to 2022 continued to recover from the impacts of the pandemic, there has been an increase in international and domestic visitors into Parramatta at night time, with a combined visitation of almost 1m visitors (930,879) in 2021/22, building towards pre-pandemic numbers (source: Profile ID Community - City of Parramatta - Visitor Nights 2021-2022).

## Parramatta's NTE performance

In 2022, the number of Core NTE establishments expanded by 4% to 1,493, surpassing pre-pandemic levels in 2018/19 by 22%. While employment hovered just below pre-pandemic levels (-1.6%, 8,260 jobs), sales turnover reached $1.26bn, exceeding pre-pandemic levels by 8%.

These trends reveal the strength of Parramatta's Core NTE, particularly in terms of establishment and sales turnover growth, which outpace the national Core NTE averages.

Overall, Parramatta's Core NTE shows a promising trajectory of resilience and recovery.

### Sub-sectoral performance

Parramatta's Leisure & Entertainment sub-sector saw the number of establishments surge in 2021/22 (+11%) to 309. Sales turnover also grew impressively (16%), totalling $548m in 2021/22. Employment, however, fell -4%, with 110 fewer employees, reflecting shifts in workforce dynamics possibly led by business concern to contain costs against a background of revenue loss during the pandemic.

The Food sub-sector was stable with a 3% increase in the number of establishments, bringing the total to 1,138 by June 2022. Sales turnover rose 3% to $606m in 2021/22. Employment grew by 4%, adding 195 employees.

The Drink sub-sector remained stable with no significant changes in the number of establishments and employment, while sales turnover remained consistent at $101m.

The Retail sector demonstrated moderate growth, with a 4% increase in the number of establishments (1,153 in June 2022). Sales turnover grew by 9% to $2,565m in 2021/22, reflecting strong consumer activity. Employment rose notably (7%) with the sector adding 450 more employees in June 2022 compared to June 2021.

The number of Accommodation establishments increased by 7% to 60 in June 2022. Sales turnover grew strongly, rising 23% in 2021/22 to $120m. Employment in the sector grew strongly with a 10% increase, representing 65 more employees.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 1,493<br>+4% | 5% |
| Employment | 8,260<br>+1% | 7% |
| Sales Turnover | $1,255m<br>+8% | 3% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 46<br>0% | 3% |
| Entertainment | 309<br>+11% | 20% |
| Food | 1,138<br>+3% | 76% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 1,153 | +4% |
| Accommodation | 60 | +7% |

## PARRAMATTA'S BUSINESS CLUSTERING

Figure 35 shows the location and concentration of Parramatta's Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm as of July 2023.

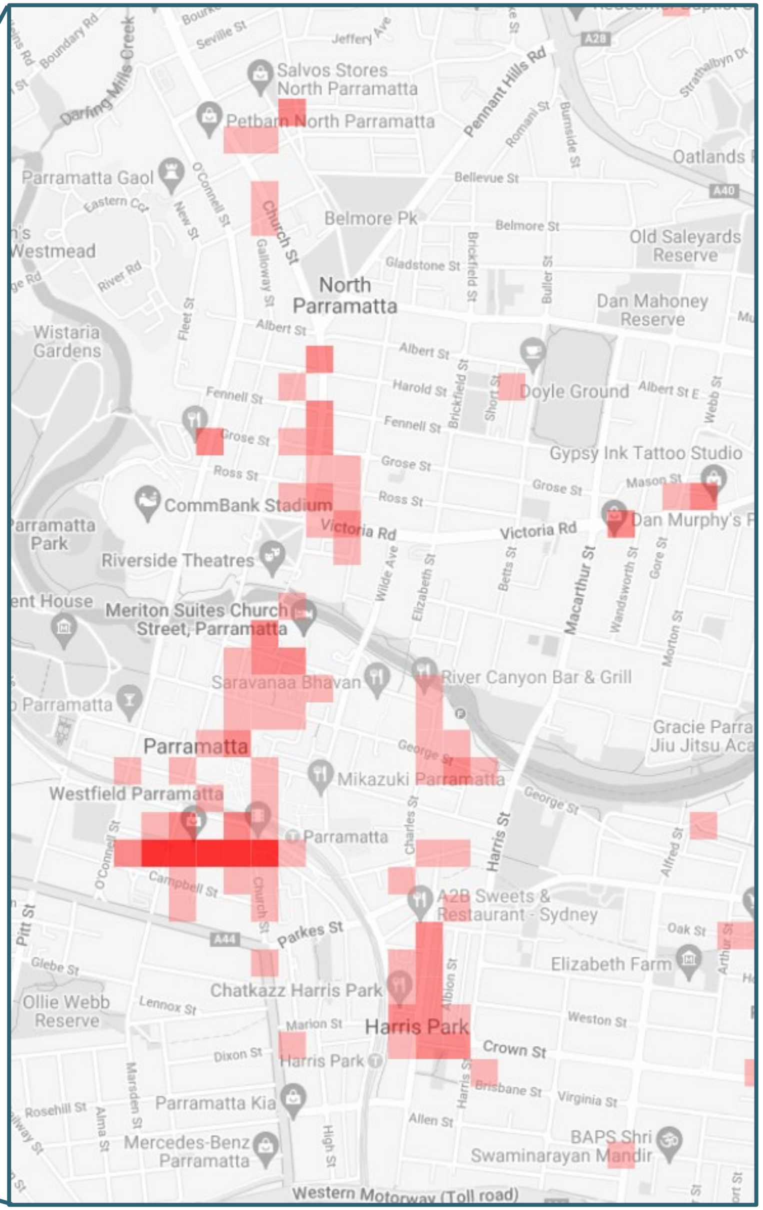
The largest cluster of consumer-facing evening businesses can be seen around the CBD, along Church Street, up to North Parramatta and within Harris Park. There are smaller clusters in locations such as:

- Epping
- Carlingford; and
- North Rocks.

A more detailed map can be viewed online [here.](#)

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 35: Parramatta LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*

## PARRAMATTA'S TRADING PATTERNS

In the City of Parramatta LGA, the day with the highest number of consumer-facing businesses open at night is Thursday. This follows a similar pattern to other Australian cities and is driven by a higher-than-usual number of retail and hair and beauty businesses trading into the evening hours (47% of these businesses are open between 6pm and 9pm on Thursdays).

Following the Thursday peak, the number of businesses trading after 6pm trails off on Friday and over the weekend. While more Core NTE businesses open later on Friday and Saturday nights, this is not substantially different to the rest of the week.

*Figure 36: Number of business **open at night** (at some point 6pm and 6am)*

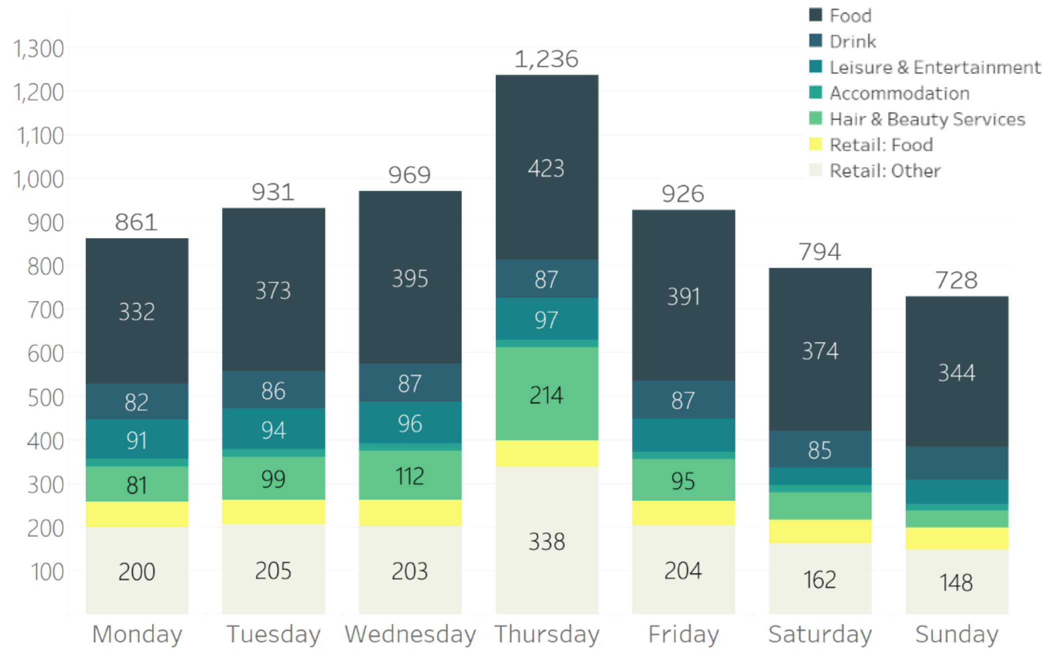



*Figure 38: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 53% | 27% | 7% | 11% |
| Tuesday | 58% | 28% | 7% | 11% |
| Wednesday | 61% | 30% | 7% | 11% |
| Thursday | 65% | 32% | 7% | 11% |
| Friday | 61% | 34% | 8% | 7% |
| Saturday | 55% | 34% | 8% | 6% |
| Sunday | 47% | 28% | 6% | 10% |

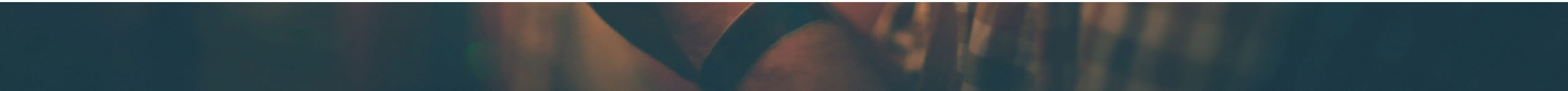
*Figure 37: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 26% | 9% | 4% | 5% |
| Tuesday | 28% | 9% | 4% | 5% |
| Wednesday | 29% | 9% | 4% | 5% |
| Thursday | 47% | 9% | 4% | 5% |
| Friday | 27% | 9% | 4% | 5% |
| Saturday | 22% | 9% | 4% | 4% |
| Sunday | 18% | 8% | 4% | 5% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*

# Penrith, NSW

Nestled at the foothills of the majestic Blue Mountains, Penrith beckons with adventure and culture, just a 50-minute drive west from the heart of Sydney. Here outdoor enthusiasts can revel in nature's bounty, knowledge seekers can expand their horizons, and foodies can savour a tantalizing array of flavours.



## PENRITH'S CITY INITIATIVES

Penrith City Council is committed to creating a safe, welcoming, and vibrant place for all residents. This is particularly important at night.

Over the past eighteen months, Penrith City Council has engaged with residents and businesses to refresh its 2016 Night Time Economy Study and Strategy. This led to a revised Penrith & St Marys 24-hour Economy Strategy in 2023. This process included reviewing what worked and where priorities had shifted due to new residential and businesses developments and the effects of the pandemic impacting the way people live, work and play in the City Centre.

Other initiatives and activations that have been supported in recent times include:

- ROAM Penrith: this family-friendly festival of fun delivered by Penrith City Council attracted 15,000 people to the CBD. The marquee-based activation included hands-on arts and crafts, roving entertainers, an enchanted garden and food trucks, with activities running late into the evening.
- Penrith Producers: This new regular activation program for Penrith (from March 2023) attracted 4,000 people per night between March and June 2023. This free evening event takes place between 5pm and 9pm and provides an opportunity for participants to discover an amazing range of crafted specialty goods, savour the tastes of delicious food and locally brewed drinks in the beer garden, be entertained and have some fun in the kids' zone and enjoy some live music.
- City Park: Penrith City Council has been investing in the transformation of City Park in the CBD – supporting outdoor dining and encouraging people to dwell day and night in the City Centre. At approximately 7,000sqm, City Park will be a significant green space in a prime location on the corner of Henry Street and Station Street. Situated opposite Penrith Westfield and a short distance from Penrith Train Station, the development is set to create a welcoming, walkable environment which invites people to explore the City Centre and discover cafes, shops and businesses. City Park will create a natural retreat and provide space for people to meet, retreat, eat, be active and connect together. These aspects are expected to strengthen the city's appeal as a destination for residents, workers, and visitors and stimulate the day and night time economy.

In addition to the above, Penrith City Council has provided more than $700,000 in strategic funding to its two City Centre Corporations – Penrith CBD Corporation & St Marys Town Centre Corporation to support business initiatives, workshops, events and activations and façade/lighting improvements.

## Penrith's NTE Performance

In 2022, Penrith's Core NTE experienced robust growth, with a 15% increase in the number of establishments to 712, surpassing pre-pandemic levels by 26%. This growth outpaced the national Core NTE sector's expansion. In line with this trend, Penrith's Core NTE supported 4,010 jobs by June 2022, exceeding pre-pandemic levels by 5%, and showing a steady recovery.

In 201/22, Penrith's Core NTE generated $476m in sales turnover, surpassing pre-pandemic 2018/19 levels by 12%, and outperforming the national average (5%) over the same period.

The growth in number of establishments, employment and sales turnover emphasises the Core NTE'S importance to Penrith's local economy, positioning it as a standout performer in the post-pandemic landscape.

### Sub-sectoral Performance

Penrith's Leisure & Entertainment sub-sector grew robustly in 2021/22: the number of businesses rose 23% to 250, sales turnover was up 14% on the previous year to $166m, and employment grew by 4%, with 55 more employees.

Similarly, the Food sub-sector showed resilience with a substantial 12% increase in the number of establishments to 435 by June 2022 and a 12% rise in sales turnover to $277m. Furthermore, employment increased by 13% to 2,420 employees, underscoring this sub-sector's pivotal role in Penrith's Core NTE.

The number of establishments in the Drink sub-sector grew 13% in 2021/22, bringing the total to 27. Sales turnover increased by 7% to $32m, and employment grew by 2%.

The Retail sector underwent substantial growth during the period. The number of establishments increased 13% to 541 by June 2022. Sales turnover surged by 8% to $844m, reflecting robust consumer activity. Additionally, employment rose 6%, adding 150 more people to the workforce.

There was a small -4% decline in the number of Accommodation establishments in 2021/22. However, sales turnover (+21%) and employment (+8%) showed strong growth.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 712<br>+15% | 4% |
| Employment | 4,010<br>+9% | 6% |
| Sales Turnover | $476m<br>+12% | 2% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 27<br>+13% | 4% |
| Entertainment | 250<br>+23% | 35% |
| Food | 435<br>+12% | 61% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 541 | +13% |
| Accommodation | 22 | -4% |

## PENRITH'S BUSINESS CLUSTERING

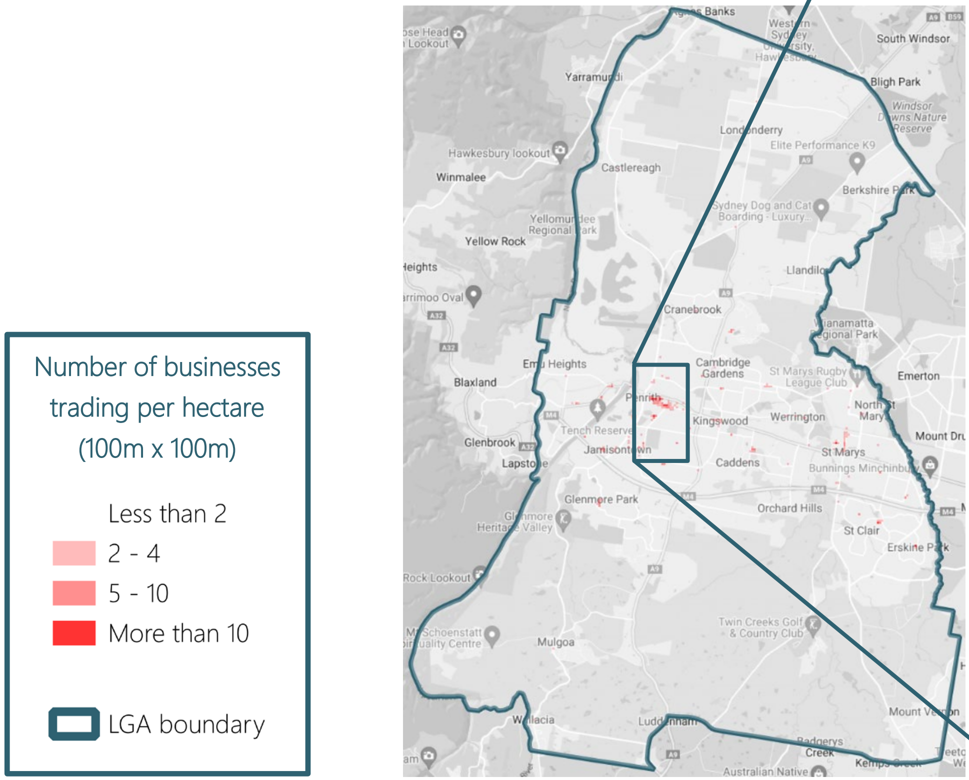
Figure 39 shows the location and concentration of Penrith's Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm as of July 2023.

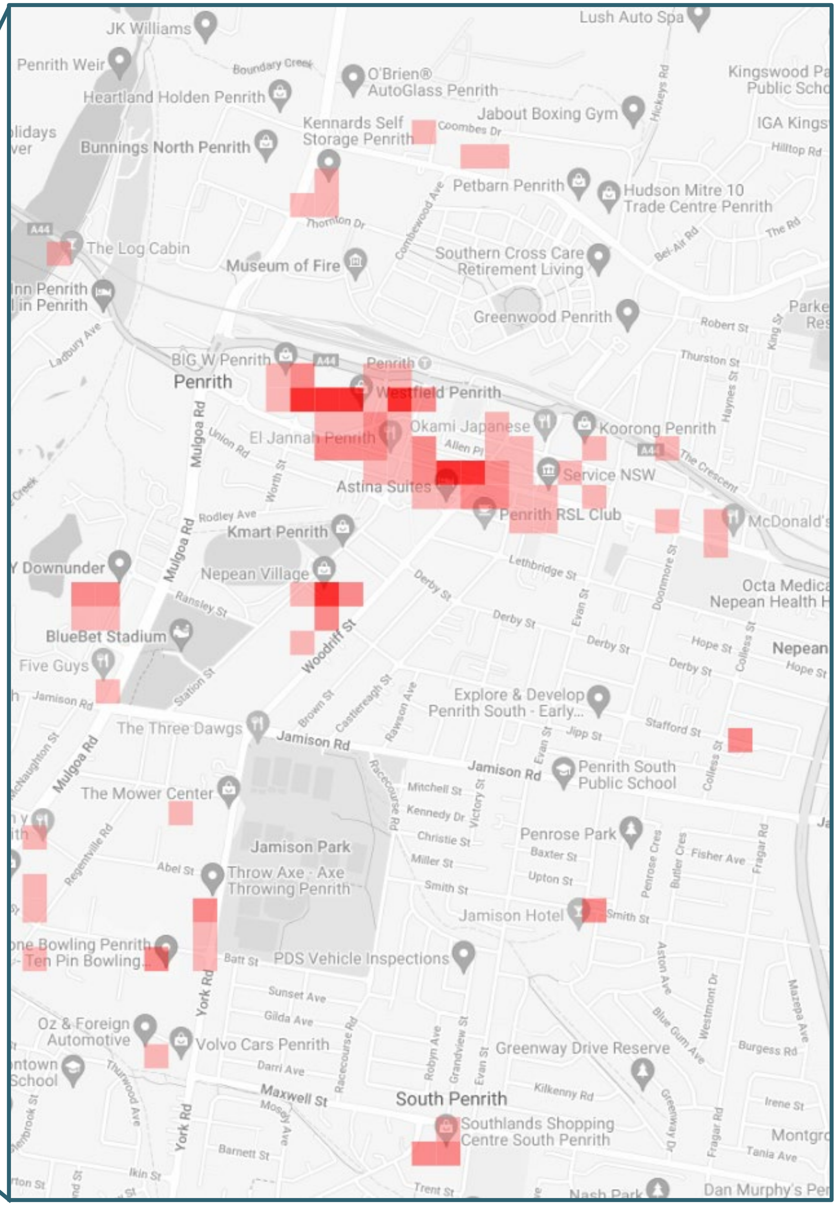
The primary cluster of activity can be seen around Penrith's town centre, with another precinct located to the east, along Queen Street in St Marys.

A more detailed map can be viewed online [here.](here.)

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 39: Penrith LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*



# PENRITH'S TRADING PATTERNS

More businesses trade on Thursday nights in Penrith than on any other night of the week. On top of this, Penrith has a higher proportion of consumer-facing businesses open on Thursday evenings than any of the other cities examined in this report. On Thursday evenings, 73% of Penrith's Core NTE businesses are open (Maroondah has the second highest with 68%), while 54% of Penrith's Retail, Hair and Beauty Services are open (Maroondah and Parramatta are joint second, with 47%). As such, Thursday nights provide a helpful template for what could be achieved on other nights of the week in Penrith.

*Figure 40: Number of business **open at night** (at some point 6pm and 6am)*

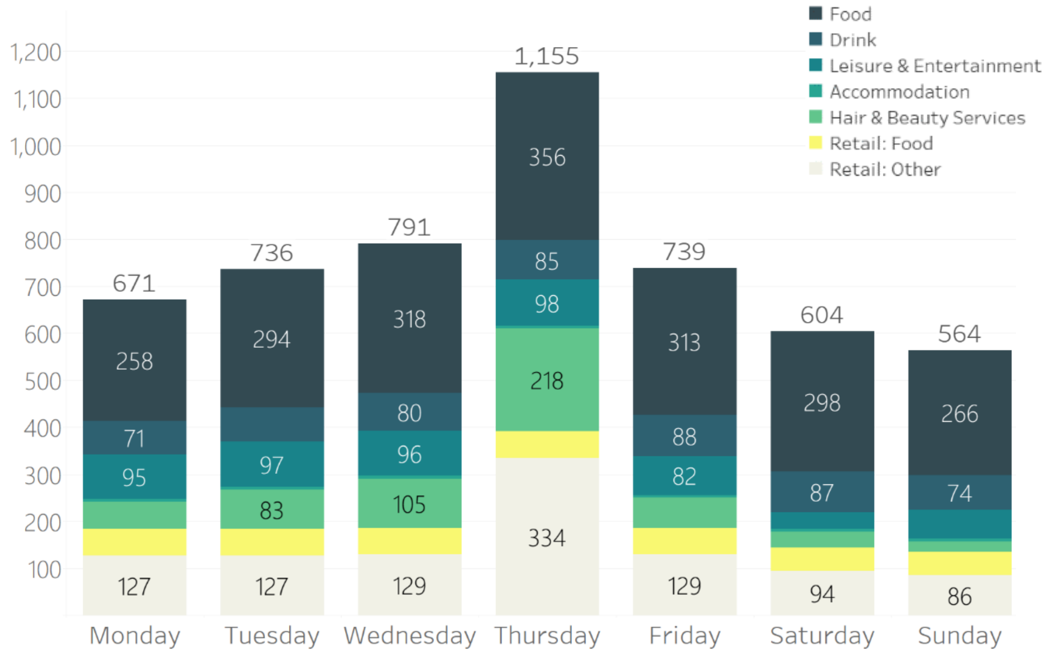



*Figure 42: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 57% | 22% | 8% | 13% |
| Tuesday | 63% | 24% | 8% | 13% |
| Wednesday | 67% | 26% | 9% | 13% |
| Thursday | 73% | 28% | 9% | 13% |
| Friday | 67% | 33% | 11% | 9% |
| Saturday | 58% | 32% | 10% | 7% |
| Sunday | 50% | 24% | 7% | 13% |

*Figure 41: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 21% | 8% | 5% | 6% |
| Tuesday | 24% | 8% | 5% | 6% |
| Wednesday | 26% | 8% | 5% | 6% |
| Thursday | 54% | 8% | 5% | 6% |
| Friday | 22% | 8% | 5% | 5% |
| Saturday | 16% | 8% | 4% | 5% |
| Sunday | 13% | 7% | 5% | 6% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*


# Perth, WA

Australia's most geographically unique capital city boasts an extensive and diverse array of bars, restaurants, shopping opportunities, entertainment and recreational experiences for all residents, workers and visitors. With a focus on increasing residential density, the City of Perth's residential development incentives will deliver more facilities, business opportunities, and continue to offer a thriving and vibrant capital of Western Australia both day and night.

## Perth's City Initiatives

Perth, as the capital city of Western Australia, plays host to the state's premier entertainment precinct in Northbridge as well as an increasingly active and high performing NTE through Central Perth and its surrounding neighbourhoods.

In 2022/23, the City of Perth has continued to engage Night Time Economy stakeholders through the established Perth Liquor Accord, tailored business engagement and continues to provide a range of post-pandemic initiatives to support the NTE. This includes free night-time parking in City of Perth carparks and fee-free outdoor dining permits. The City of Perth also trialled a three-week closure of James Street in Northbridge on Friday and Saturday nights.

In 2022, Council approved a 10-year Economic Development Strategy 2022-2032. One of the themes is "A City Reimagined – Position Perth as a place where people want to be day and night" by partnering and delivering programs to promote the city as an extended hours destination with a vibrant NTE. A dedicated five-year lighting program will also enhance the night-time environment in Perth along with multiple "Light it Up" projects across the city's neighbourhoods, and laneways, the lighting of pedestrian bridge in East Perth. These initiatives are enhanced with a Forgotten Spaces: Revitalising Perth's Laneways Program and Business Improvement Grants that can be used for lighting enhancements to building facades and outdoor dining areas.

Council has provided new levels of support for residential density and development within Central Perth, which will assist in night-time activation and safety through rates reimbursements for residential developments including Build-to-Rent and Student accommodation as well as the waiving of development fees and a new "City Living" marketing campaign.

Council has maintained advocacy for deregulated trading hours and has progressed a complex body of work related to the Northbridge Special Entertainment Precinct Scheme Amendment 41. This aims to protect Northbridge as the state's premier entertainment district through amended noise regulation in the area. The City of Perth has also recently completed a significant $22m upgrade of Roe Street in Northbridge as part of the Perth City Deal to complement larger developments including the new Edith Cowan University currently being built in the Perth City Link which will deliver close to 10,000 staff and students to further support local businesses and night-time activity when it opens in 2025.

Significant support for events has been delivered through a range of sponsorships for major events and festivals, local activation grants, venue support grants, economic development, and arts and culture sponsorships. The City of Perth has produced its own events that bring the city to life at night including the award-winning Christmas Lights Trail, regular Drone and Fireworks Shows at Elizabeth Quay and the month-long Boorloo Heritage Festival.

These initiatives mean that of all the capital cities, Perth has seen the greatest increase in the number of people in the CBD on weekdays and weekends in April 2023 compared to pre-pandemic levels. Night-time spending from January to May 2023 was also higher than the comparable months for the previous four years.

## PERTH'S NTE PERFORMANCE

Perth has the third highest density of Core NTE and Drink businesses per residential population when compared to the 88 local government areas analysed.

While Core NTE establishments in the city remained stable (+1.9%) between June 2021 and June 2022, the sector's employment witnessed remarkable growth, surging by 13% and surpassing pre-pandemic levels. This robust employment recovery outperformed the national trend. Similarly, Perth's Core NTE generated a remarkable 16% increase in sales turnover in 2021/22 over pre-pandemic (2018/19) levels, emphasising its resilience. This growth exceeded the national Core NTE average, highlighting Perth's strong recovery in this regard.

Overall, Perth's Core NTE sector has been resilient, particularly in employment and sales turnover, positioning it as a standout performer in a post-pandemic environment.

### SUB-SECTORAL PERFORMANCE

The Leisure & Entertainment sub-sector stood out with a substantial 16% increase in the number of establishments to 93, and impressive sales turnover growth during the period of 9% to $228m. Employment expanded by 13%, adding 165 more employees.

The Food sub-sector in Perth remained stable, showing a modest 1.8% increase in the number of establishments to 454 in June 2022 and a modest 3% rise in sales turnover to $744m over the same period. Employment, meanwhile, grew by 12%, adding 775 more employees.

In contrast, the number of Drink establishments fell -8% in 2021/22, although turnover increased by 11% to $320m, and employment grew by 14%.

The number of Accommodation establishments grew 5% to 96 in June 2022. The sector's sales turnover increased 8% to $703m and employment rose 17% (+740 more employees).

The Retail sector displayed modest growth. The number of establishments increased 3% to 285 in 2022, whereas turnover declined -7% to $1,149m. Employment rose 5%, with 170 more employees.

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 649<br>+2% | 5% |
| Employment | 11,305<br>+13% | 9% |
| Sales Turnover | $1,291m<br>+6% | 2% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 102<br>-8% | 16% |
| Entertainment | 93<br>+16% | 14% |
| Food | 454<br>+2% | 70% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 285 | +3% |
| Accommodation | 96 | +5% |

## PERTH'S BUSINESS CLUSTERING

Figure 43 shows the location and concentration of Perth Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm as of July 2023.

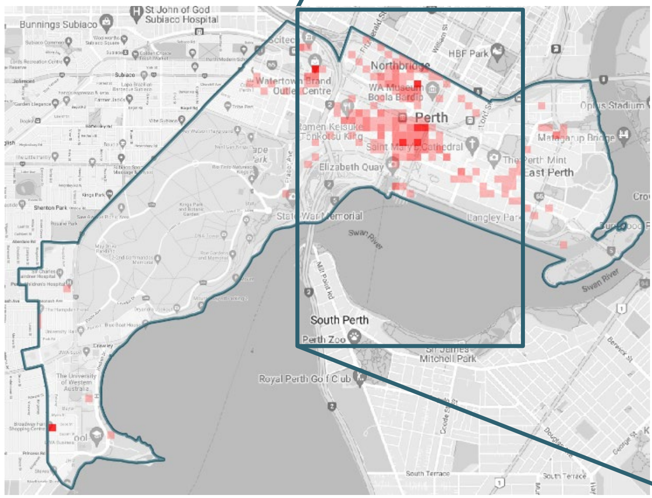
The primary clusters of activity can be seen around Perth's CBD and Northbridge. Smaller pockets of activity include:

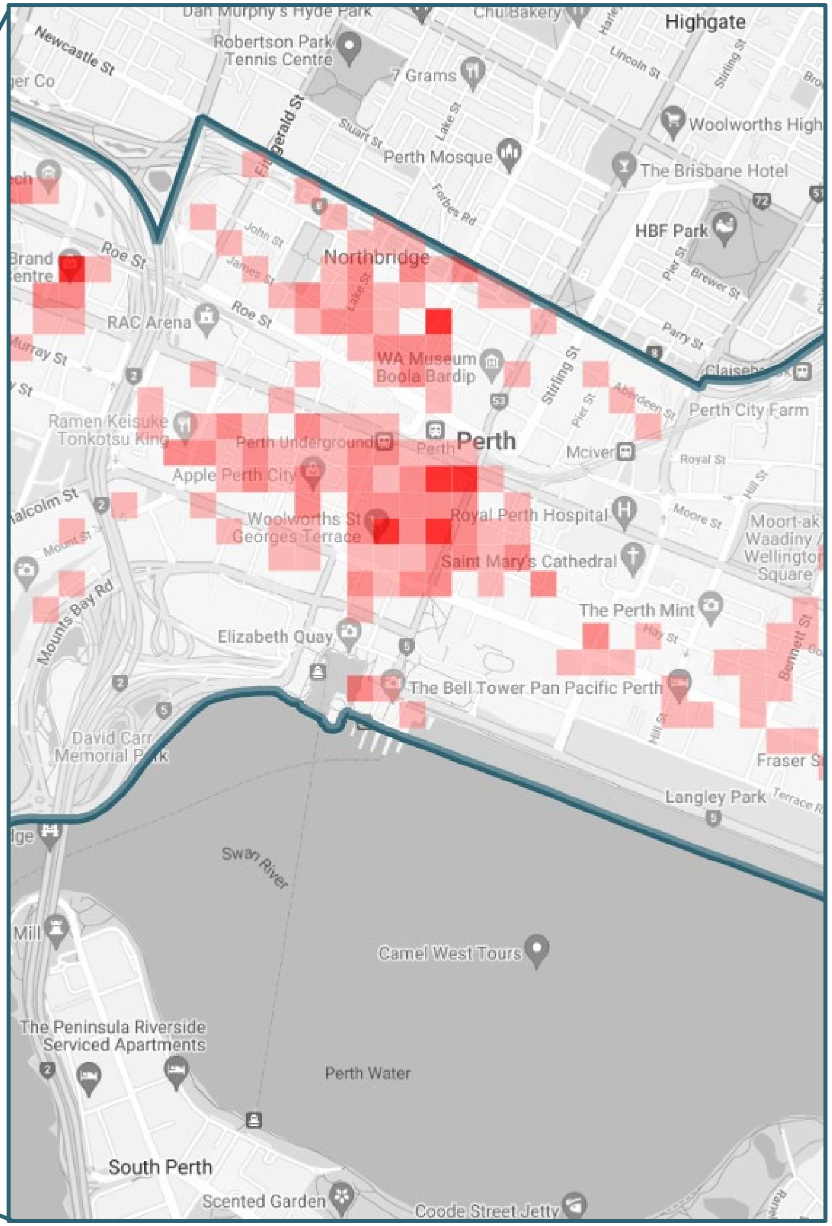
- Surrounding the Murray Street Mall, at the intersection of Murray Street and Barrack Street
- Around Watertown Brand Outlet Centre in West Perth
- Along Bennett Street in East Perth; and
- Around Broadway Fair Shopping centre to the east of the LGA.

A more detailed map can be viewed online [here.](here.)

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 43: Perth LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*




Number of businesses trading per hectare (100m x 100m)

- Less than 2
- 2 - 4
- 5 - 10
- More than 10
- LGA boundary

## Perth's Trading Patterns

Like Adelaide, Friday has the highest number of consumer-facing businesses open at night in the City of Perth LGA. This is driven by a higher-than-usual number of retail and hair and beauty businesses trading into the evening hours (40% of these businesses are open between 6pm and 9pm on Fridays). Sunday is the quietest night when the smallest number of businesses are open.

As with all other cities analysed, Core NTE businesses open later into the night and early hours on Friday and Saturday.

*Figure 44: Number of business **open at night** (at some point 6pm and 6am)*

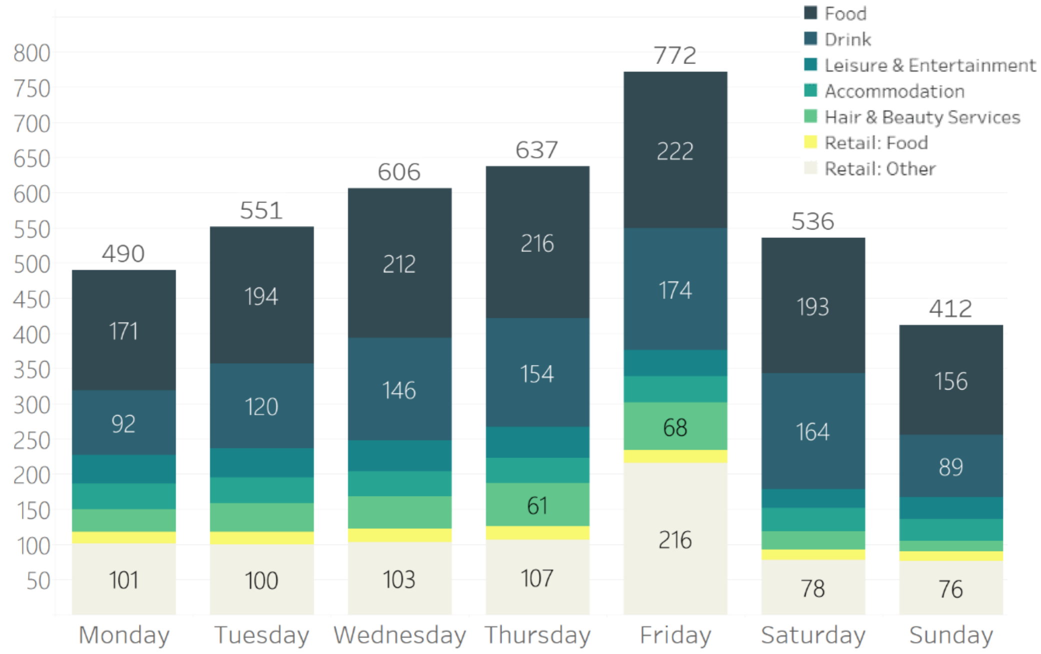



*Figure 46: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 38% | 21% | 6% | 7% |
| Tuesday | 45% | 26% | 6% | 7% |
| Wednesday | 50% | 31% | 7% | 8% |
| Thursday | 52% | 32% | 7% | 8% |
| Friday | 54% | 40% | 13% | 8% |
| Saturday | 48% | 38% | 13% | 8% |
| Sunday | 34% | 22% | 6% | 7% |

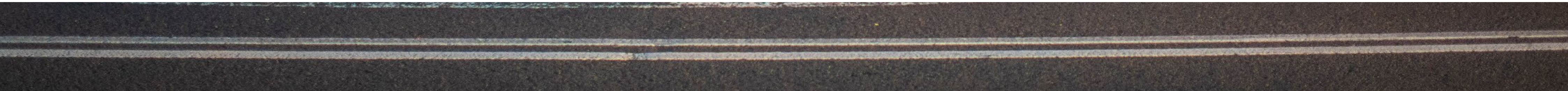
*Figure 45: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 19% | 11% | 7% | 7% |
| Tuesday | 21% | 11% | 7% | 7% |
| Wednesday | 22% | 11% | 7% | 7% |
| Thursday | 24% | 11% | 7% | 7% |
| Friday | 40% | 11% | 7% | 7% |
| Saturday | 16% | 11% | 6% | 6% |
| Sunday | 12% | 9% | 6% | 6% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*

# Sydney, NSW

Australia's Harbour City hosts several iconic attractions such as the Sydney Opera House, Circular Quay, Darling Harbour as well as a vibrant arts, culture and theatre scene. When combined with is world class dining and bar options, the City of Villages offers it all.



## Sydney's City Initiatives

In the 2021/22 financial year, the City of Sydney Council (The City) delivered a range of initiatives and worked with key stakeholders to support businesses and consumers to participate in its 24-hour economy.

The use of outdoor space was particularly important to the hospitality industry to support continued trading during recovery from the pandemic. The City's Alfresco Outdoor Dining Program commenced in November 2020, with a further 258 applications approved in the 2022 FY. These approved applications included 61 requests to reallocate 504m$^2$ of road space to outdoor dining, and a further 197 to reallocate 2,103m$^2$ of footway space. In addition, more than $5.3m of footway dining fees were waived as part of this program. In a March 2022 survey, 91% of Alfresco Outdoor Dining Program participants reported the program was either beneficial or crucial to their business. Almost three quarters (74%) of participants had employed an additional one or more staff per week and 39% had experienced up to a 20% increase in turnover. Due to the ongoing success of the program it has been extended to December 2024, with fee waivers in place to June 2025.

The City delivered a variety of capacity building programs to help businesses adapt, innovate, and thrive in light of the pandemic, including:

- Reboot, a 9-week webinar series for small businesses to help improve their digital skills. More than 3,600 businesses attended, with 92% of attendees reporting that the knowledge gained would help them to grow.
- The Business Innovation Program, a free 10-week accelerator program that supported 20 local small retail, hospitality and tourism businesses to develop and nurture entrepreneurial skills.

The City provided close to $3.7m in grant funding to nightlife businesses and creative enterprises including:

- 41 Night-Time Diversification and Live Music and Performance business grants valued at over $700,000.
- 14 Precinct Activation Grants valued at $3m to support collaborative partnerships between businesses, creatives and communities that renew and transform the city centre, local precincts, and neighbourhoods.

In addition to the above support, the City waived $2.9m in rent relief for creative spaces, short term vacant property, creative accommodation, and live/work tenancies.

## SYDNEY'S NTE PERFORMANCE

Sydney stands out in Australia's NTE, hosting the highest density of Core NTE establishments per $km^2$ of the 88 local government areas analysed. Furthermore, the LGA ranks second only to Adelaide in terms of the density of Core NTE, Food, and Drink businesses per residential population.

In 2021/22, the number of establishments in Sydney's Core NTE increased by 6% to reach 5,941, representing 5% of Australia's Core NTE firms, and 17% increase from the pre-pandemic level in 2018/19. Employment in the sector rebounded to 34,065 jobs (+5% between June 2021 and June 2022) but is still 6% down from pre-pandemic levels. Sales turnover was $4.7bn, marking a 4% growth from pre-pandemic levels.

### SUB-SECTORAL PERFORMANCE

The Leisure & Entertainment sub-sector gained 134 (+14%) establishments between June 2021 and June 2022, bringing the total to 1,118. Sales turnover grew steadily, rising 4% to $1,233m. Employment was relatively stable, falling -1%.

The Food Sub-sector grew consistently, with the number of establishments increasing 4% to 4,088 in June 2022. Turnover increased 6% to $2,671m and employment in this sub-sector also grew, rising 7% to 20,870 employees, and underscoring its importance in the city's NTE landscape.

The Drink sub-sector also grew, with a 10% increase in the number of establishments, totalling 735 in 2022. Turnover increased by 12% to $809m and employment also grew by 9%, totalling 5,170 employees.

The Retail sector in the city also grew, with 6% more businesses, 1% more employees and 20% more sales turnover in 2021/22, when compared to 2018/19, with inflation likely to have played a role in this performance.

The number of Accommodation businesses increased by 19% between June 2021 and June 2022, representing a 38% increase on pre-pandemic levels 2018/19, higher than any NTE sector or other capital city. Much of this improvement is driven by an increase in non-employing businesses, which may be a factor in sales turnover and employment remaining lower than pre-pandemic levels (-14% and -16% respectively).

### Core NTE

| Measure | # Core NTE 2022<br>% Change 21-22 | % Total Economy |
|---|---|---|
| Establishments | 5,941<br>+6% | 11% |
| Employment | 34,065<br>+5% | 7% |
| Sales Turnover | $4,713m<br>+6% | 4% |

| Sub-sector | # Establishments<br>% Change 21-22 | % Core NTE |
|---|---|---|
| Drink | 735<br>+10% | 12% |
| Entertainment | 1,118<br>+14% | 19% |
| Food | 4,088<br>+4% | 69% |

### Retail & Accommodation (Non-Core NTE)

| Measure | # Establishments 2022 | % Change 21-22 |
|---|---|---|
| Retail | 2,678 | +2% |
| Accommodation | 557 | +19% |

## SYDNEY'S BUSINESS CLUSTERING

Figure 47 shows the location and concentration of Core NTE, Retail, Hair and Beauty Services businesses trading at some point between 6pm and 9pm as of July 2023.

The City of Sydney's consumer-facing night time businesses are most prevalent to the north of the LGA.

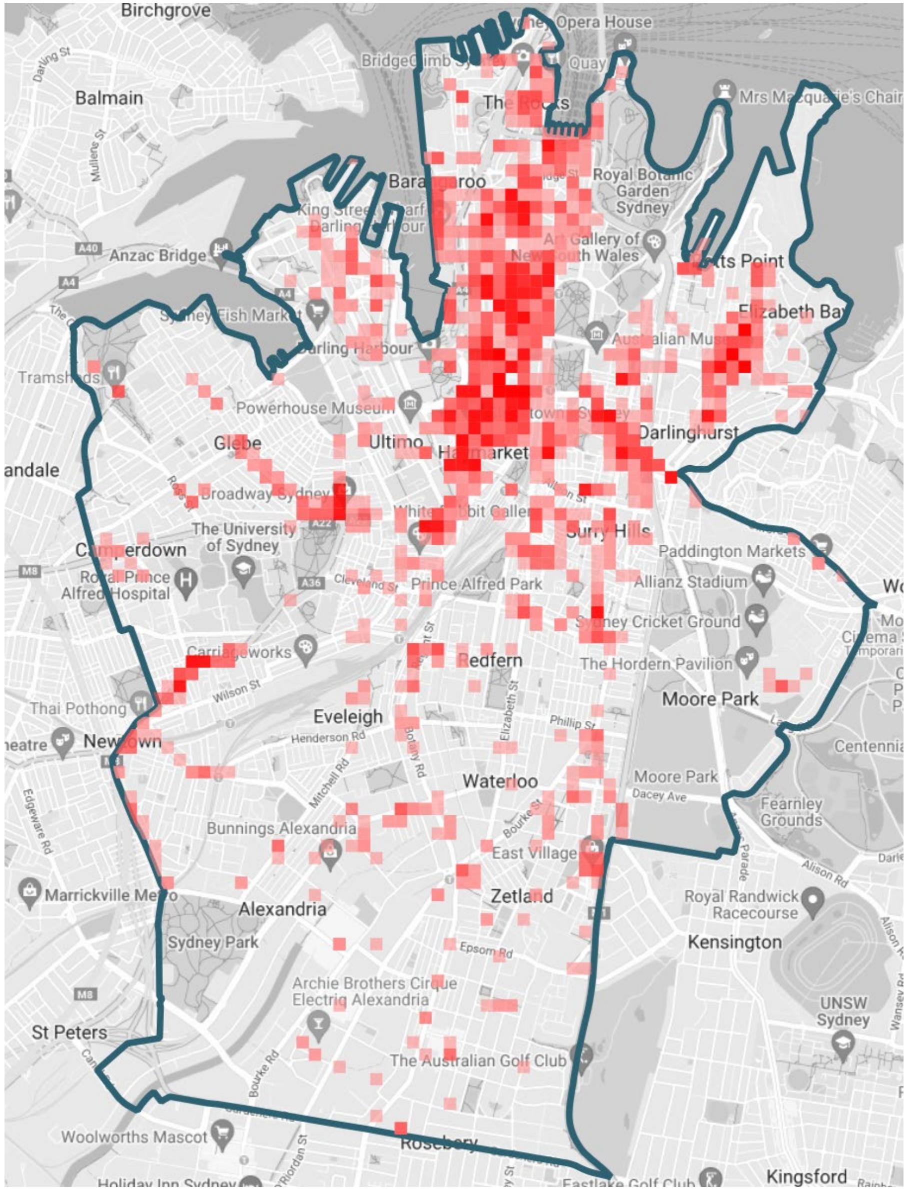
Particularly dense pockets of activity can be found where safe and convenient transport options are available, such as areas near train stations and along light rail lines particularly around:

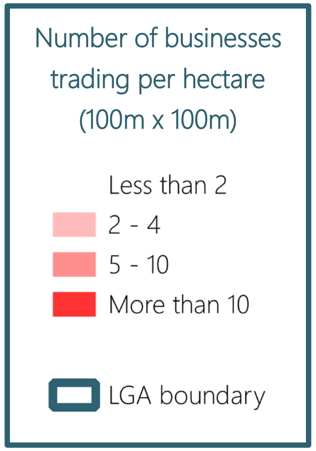
- the CBD, from the Rocks in the north to Chippendale in the south – this is where the largest number of consumer-facing night time businesses are located
- other 24 hour trading areas in Potts Point and Oxford Street, Darlinghurst
- the high streets and local centres of Surry Hills, Redfern, Pyrmont/Ultimo, Glebe, Newtown, Erskineville, and East Village in Zetland.

A more detailed map can be viewed online [here.](here)

*See 'Using supplementary maps' (Appendix p74) for guidance.*

*Figure 47: Sydney LGA's Evening (6-9pm) Core NTE, Retail, Hair and Beauty Services business concentrations*



## SYDNEY'S TRADING PATTERNS

In the City of Sydney LGA, Thursday has the highest number of consumer-facing businesses open at night. This is driven by a higher-than-usual number of Retail, Hair and Beauty Services businesses trading in the evening (50% of these businesses are open between 6pm and 9pm on Thursdays). Monday nights have the fewest Drink and Accommodation establishments open, while Sundays have the fewest open in all other categories. Fridays and Saturdays are when Core NTE businesses tend to open later.

The data highlights an opportunity for more consumer facing businesses to adjust their trading patterns to service night time demand.

*Figure 48: Number of business **open at night** (at some point 6pm and 6am)*

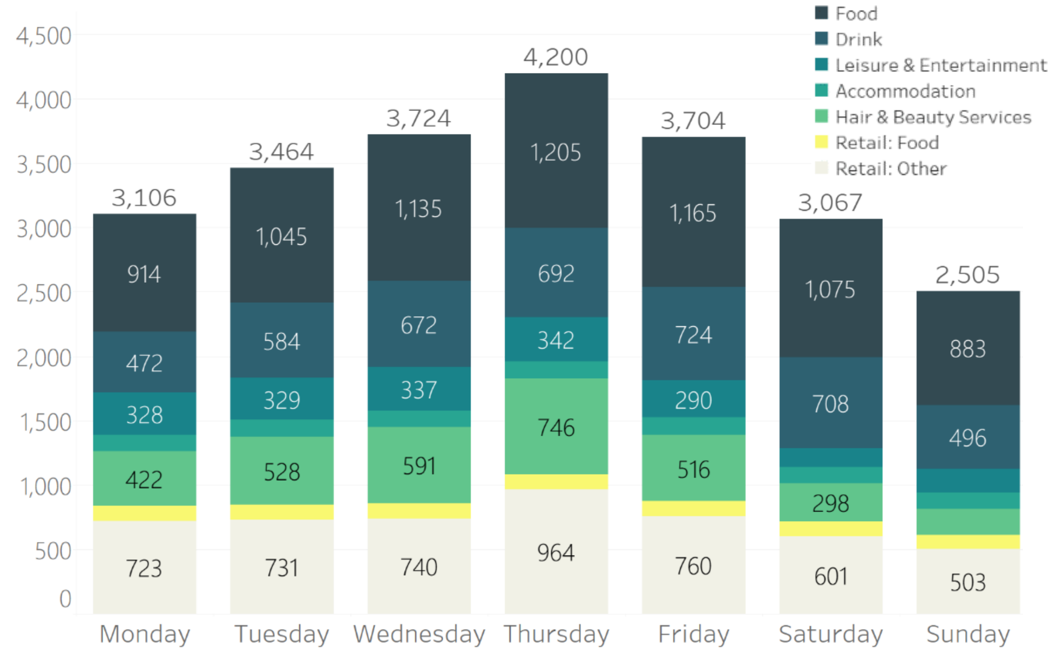



*Figure 50: Proportion of all **Core NTE** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 47% | 27% | 7% | 9% |
| Tuesday | 54% | 33% | 7% | 9% |
| Wednesday | 59% | 37% | 8% | 9% |
| Thursday | 62% | 39% | 9% | 9% |
| Friday | 61% | 43% | 13% | 7% |
| Saturday | 54% | 42% | 12% | 7% |
| Sunday | 41% | 28% | 7% | 9% |

*Figure 49: Proportion of all **Retail, Hair & Beauty Services** businesses open*

| Weekday (6pm-6am) | Evening 6pm-9pm | Early-Night 9pm-12am | Late-Night 12am-3am | Early-hours 3am-6am |
|---|---|---|---|---|
| Monday | 35% | 12% | 6% | 6% |
| Tuesday | 38% | 12% | 7% | 6% |
| Wednesday | 40% | 12% | 7% | 6% |
| Thursday | 50% | 13% | 7% | 6% |
| Friday | 38% | 13% | 7% | 6% |
| Saturday | 28% | 12% | 7% | 6% |
| Sunday | 22% | 11% | 6% | 6% |

*Please note that 12am-3am and 3am-6am timeframes are presented as belonging to the night before, for ease of interpretation i.e. 3-6am in the Saturday row is 3-6am Sunday.*

# Appendix

## Economic performance data

The data used in this report was acquired from the Australian Bureau of Statistics (ABS) via bespoke request to their Counts of Australian Businesses, including Entries and Exits (CABEE), June 2017 to June 2022 dataset [i]. Developed through a collaborative approach with the ABS, the bespoke request covered a selection of key ANZSICs for 88 of the most populous and economically active Local Government Areas (LGAs) in Australia. This dataset was analysed and modelled using additional ABS datasets including labour force data [ii] and industry sales and service income [iii] data (sales turnover).

In some cases, ANZSIC level data can be provided; in other cases, the numbers can be small. This can be problematic, because the ABS applies perturbation [iv] techniques when dealing with smaller numbers to maintain confidentiality of businesses in the dataset, which can lead to large percentage swings when comparing between years.

### Important notes / limitations of the CABEE dataset

The CABEE dataset captures actively trading establishments with an Australian Business Number (ABN) that are registered for Goods and Services Tax (GST) as of the 30th of June each year. Establishments without an ABN or that are not registered for GST are excluded from the dataset.

Most establishments are counted as a single unit, at the location of their registered address, or at the address with the highest employment. Establishments operating from multiple locations (for example large cinema chains) may only be counted once. Conversely, establishments that have registered separate ABNs on account of their legal structures, may be counted multiple times. For larger businesses with complex and diverse legal structures, the ABS liaises directly with the businesses to determine Type of Activity Units – the ABS terminology for producing business or branch of a larger business.

Each establishment is classified to a single ANZSIC code based on the main source of industry value added (using sales of goods and services, wages and salaries or number of employees as a proxy), which is generally based on a description provided by the business. ANZSIC classifications may therefore not reflect all the activities carried out at an establishment, particularly where the establishment is counted as a single unit but different activities are undertaken at different locations.

All employment and turnover estimates refer to the total employment and sales turnover in each specified ANZSIC or sub-sector, and as a result includes both day and night time activity. Ingenium Research is currently exploring opportunities to determine the temporal split of sales turnover and employment for future research. Please note also that sales turnover figures in this document reflect the nominal value and do not take inflation into account.

### ACT caveat on Labour Force Survey data

It should be noted that the ACT Government has raised concerns over the quality of the ABS' 2022 Labour Force Survey due to misalignment between this data and ABS Weekly Payroll data.

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[i] ABS Catalogue 8165.0 - Counts of Australian Businesses, including Entries and Exits, Jun 2016 to Jun 2021

[ii] ABS Catalogue 6202.0 - Labour Force

[iii] ABS Catalogue 8155.0 – Australian Industry

[iv] The ABS Catalogue 8165.0 for CABEE explains the use of perturbation in the context of business counts. Additional information on the perturbation technique is available in the Census of Population and Housing dataset (ABS Catalogue 2011.0.55.001)

### 2021/22 considerations for the CABEE dataset

The Australian Bureau of Statistics has noted the following impacts of the pandemic on the CABEE series, which should be borne in mind when reviewing the results:

- Higher business entries: The business entry rate in 2021/22 was 19.7% compared to 15.8% in 2020-21. This was the main driver of the observed 7% increase in business counts during 2021/22. While entry rates were higher than last year for all states and territories, there was a sharp increase in Victoria's entry rate, going from 3.9% in 2020/21 to 10.9% in 2021/22.
- Return to businesses categorising as non-employing from employing: In 2021/22 non-employing businesses increased by 140,102 (9.9%) while total employing businesses increased by 27,544 (2.8%), reflecting patterns seen prior to the pandemic.
- Updates to ANZSIC coding: From June to September 2021 43,103 ABNs changed their ANZSIC code. Of these, 87.8% (37,845 ABNs) were in Victoria. A significant number of these aligned with financial incentives offered by the Victorian Government requiring ABNs to be in defined ANZSIC classes to be eligible.

The last point has led to some large swings in business counts, particularly in rural areas of Victoria in the Core and Non-Core NTE. There are also notable increases in Non-Core Transport businesses in Victoria.

## Trading patterns and clustering

To provide a more detailed view of where businesses are based and the times that establishments are operating, Ingenium Research utilised the Google Maps/Places API [v]. This involved developing detailed geographic search criteria across each city to identify relevant night time businesses to understand where they are clustering and then analysing their hours and days of trading. The results of these searches were dynamically geocoded to standard geographic boundaries (LGA, Postcode and SA2, SA1) and then presented as GIS maps and aggregated data tables to comply with Google's terms of reference.

Trading pattern analysis demonstrates the proportion of all businesses in an area or sector that are operating at a specified point in time or day of the week. For the purposes of this report, analysis focused on businesses trading on at least one day of the week during the periods of 6pm-9pm, 9pm-12am, 12am-3am and 3am-6am.

### Important notes / limitations of Google Places

Although Google's activity descriptors are slightly different to ANZSICs, they align well. As a result, Google's activity descriptors have, where possible, been mapped to the ANZSIC categories comprising Core NTE and Non-Core NTE used in the economic performance analysis (refer to Tables 2, 3 and 4 below) to provide a consistent view of activity.

It is also important to note that Google stores multiple activities per establishment (up to twenty) and therefore an establishment could map to multiple NTE sub-sectors based on information provided by the establishment. For example, a pub that offers food might classify itself as a 'pub' primarily, with a secondary activity of 'restaurant'. Like ABS CABEE, this analysis focuses only on the primary activity (e.g. pub) of the establishment.

It should be noted that only businesses with a web presence are captured via the Google Places API and as such, the results of the analysis process should not be considered a census of business activity. That being said, comparison with the ABS CABEE dataset suggests that Google establishment counts for the Core NTE and consumer facing Non-Core NTE activities are approximately 90% of the business counts

[v] This is based on data behind Google Maps (a free service for businesses), rather than paid-for Google Ads.

presented by CABEE, representing an excellent sample of activity.

The results reflect the opening hours stored in Google at the time of analysis (July 2023) and may or may not be impacted by seasonality changes or other factors (e.g. the pandemic) affecting trading hours. Similarly, the accuracy of the data relies on business owners updating opening hours within their Google account in a timely and accurate manner.

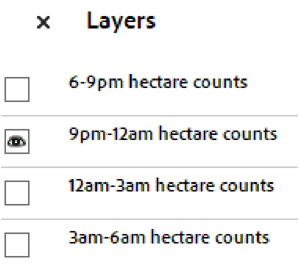
## Using supplementary maps

In each city's business clustering section, a link is provided to a supplementary map, which allows further interrogation of business clustering data (as of July 2023) across the hours of the night.

These maps are geospatial PDFs that show counts of Core NTE, Retail, Hair and Beauty Services businesses trading by hectare within each LGA boundary. The default view shows the number of businesses trading between 6pm and 9pm and will be available by opening the file in an internet browser such as Google Chrome.

The maps also provide business counts at three other periods of the night (9pm-12am, 12am-3am and 3am-6am). To view these other time periods and fully utilise the functionality of these geospatial PDFs, it is necessary to download a copy of the file and open it in Adobe Acrobat.

Within Adobe Acrobat, there will be an icon on the left or right hand side of the screen (depending on your version) that lets you access the different map layers available ( or ). Once this icon has been clicked, you will be presented with the different layers available. Simply unselect '6-9pm hectare counts' and select another time period of interest to see business clustering for that time period, e.g.




## NTE definition

As noted in the Glossary of Terms, Night Time Economy activity is broken down into Core, Non-Core and Supply sectors. These NTE sectors are defined using the Australian and New Zealand Standard Industrial Classification (ANZSIC) system, which are aligned with definitions used in previous work in the United Kingdom and New Zealand. The definition of the NTE was developed by TBR Ltd and MAKE Associates, through granular analysis of Dun & Bradstreet business data in 2008/9. This definition was adapted from the United Kingdom's Standard Industrial Classifications (SICs) to Australia's ANZSICs for the City of Sydney's 2011 Cost Benefit Analysis Study, and has been employed in the annual NTE research for CCCLM member cities ever since.

A similar approach has since been adopted by the Greater London Authority (GLA) for the purpose of measuring London's NTE with equivalent data from the United Kingdom's Office for National Statistics (ONS). The GLA's analysis utilised data from the ONS' Labour Force Survey to understand which industries have the highest proportion of employees working at night. This was used to select industries with a higher propensity of night time workers and group them into similar activities (e.g. cultural and leisure. The GLA's analysis aligns well with the NTE ANZSICs shown below in Tables 2, 3 and 4.

### Important note / limitations of the NTE definition

The ANZSIC codes used to define Core, Non-Core and Supply are provided below. It should be noted that temporal breakdown of economic activity is not recorded in official economic data sources. Therefore, while ANZSICs have been selected based on businesses with a propensity to operate at night, establishment counts may include businesses that operate solely during, or for part of, the day. As such, employment and sales turnover figures may also include daytime activity.

## ANZSIC DEFINITIONS

*Table 2: Core NTE ANZSIC definition*

| NTE Sub-Sector | ANZSIC | Description |
|---|---|---|
| Drink | 4123 [vi] | Liquor Retailing |
| | 4520 | Pubs, Taverns and Bars |
| Leisure & Entertainment | 5513 [vii] | Motion Picture Exhibition |
| | 900 | Creative and Performing Arts Activities |
| | 911 [viii] | Sports and Physical Recreation Activities |
| | 912 | Horse and Dog Racing Activities |
| | 913 | Amusement and Other Recreation Activities |
| | 920 [ix] | Gambling Activities |
| | 4530 | Clubs (Hospitality) |
| | 9534 | Brothel Keeping and Prostitution |
| Food | 4511 | Cafes and Restaurants |
| | 4512 | Takeaway Food Services |

*Table 3: Non-Core NTE ANZSIC definition*

| NTE Sub-Sector | ANZSIC | Description |
|---|---|---|
| Care | 771 | Public Order and Safety Services |
| | 840 | Hospitals |
| Arts Education | 8212 | Arts Education |
| Libraries & archives | 601 | Libraries and Archives |
| Design | 692 | Architectural, Engineering and Technical Services |
| Food | 411 | Supermarket and Grocery Stores |
| | 4121 | Fresh Meat, Fish & Poultry Retailing |
| | 4122 | Fruit & Vegetable Retailing |

[vi] It should be noted that each state and territory has its own liquor licensing regulations/laws. As such, liquor retailing activity may be more likely to occur during the night in some states and territories than in others.

[vii] This level of ANZSIC detail is not normally available at LGA level via ABS request due to small numbers that would not pass confidentiality rules. For City of Sydney, the Floor and Employment Survey in the original Sydney Cost Benefit Analysis work (2011) allowed further disaggregation of this ANZSIC 551 (Motion Picture and Video Activities) to arrive at Motion Picture Exhibition (ANZSIC 5513), i.e. cinemas, meaning this ANZSIC can still be presented separately for Sydney. For all other LGAs the wider grouping of Motion Picture and Video Activities (ANZSIC 551) is captured as a Supply NTE activity.

[viii] ANZSIC 911 (Sports and Physical Recreation Activities) includes ANZSIC 9114 (Sports and Physical Recreation Administrative Service) and so could potentially over estimate night time related activity within this industry. ANZSIC 9114 accounts for 5% of establishments within ANZSIC 911, although associated sales and employment may be higher.

[ix] ANZSIC 920 (Gambling Activities) includes ANZSIC 9209 (Other Gambling Activities), which captures internet gambling operation and TAB operation, that may occur during the day.

| NTE Sub-Sector | ANZSIC | Description |
|---|---|---|
| | 4129 | Other Specialised Food Retailing |
| Accommodation | 4400 | Accommodation* |
| Infrastructure | 29 | Waste Collection, Treatment and Disposal Services |
| | 751 | Central Government Administration |
| | 753 | Local Government Administration |
| | 772 | Regulatory Services |
| | 9531 | Laundry and Dry-Cleaning Services |
| Other Education | 8219 | Adult, Community and Other Education not elsewhere classified |
| Promotion | 694 | Advertising Services |
| Research | 695 | Market Research and Statistical Services |
| Retail/Other | 422 | Electrical and Electronic Goods Retailing |
| | 425 | Clothing, Footwear and Personal Accessory Retailing |
| | 426 | Department Stores |
| | 427 | Pharmaceutical and Other Store Based Retailing |
| | 4241 | Sport and Camping Equipment Retailing |
| | 4242 | Entertainment Media Retailing |
| | 4243 | Toy and Game Retailing |
| | 4244 | Newspaper and Book Retailing |
| | 4245 | Marine Equipment Retailing |
| Sports Education | 8211 | Sports and Physical Recreation Instruction |
| Transport | 472 | Rail Passenger Transport |
| | 482 | Water Passenger Transport |
| | 4621 | Interurban and Rural Bus Transport |
| | 4622 | Urban Bus Transport (including Tramway) |
| | 4623 | Taxi and Other Road Transport |
| | 9533 | Parking Services |

*Table 4: Supply NTE ANZSIC definition*

| NTE Sub-Sector | ANZSIC | Description |
|---|---|---|
| Drink | 12 | Beverage and Tobacco Product Manufacturing |
| | 3606 | Liquor and Tobacco Product Wholesaling |
| Entertainment | 551 | Motion Picture and Video Activities |
| | 552 | Sound Recording and Music Publishing |
| Food | 11 | Food Product Manufacturing |
| | 4513 | Catering Services |

* This consists of businesses mainly engaged in providing accommodation for visitors, such as hotels, motels and similar units. Please note that this will not include all share accommodation such as Airbnb and Stayz.

# Core NTE LGA rankings

*Table 5: Core NTE Establishments in 2021/22 – part 1*

| Position | LGA Name | State | Core NTE Establishments | Per km² | % Change 21-22 |
|---|---|---|---|---|---|
| 1 | Brisbane City Council | QLD | 7,411 | 5.5 | 5.8% |
| 2 | City of Sydney | NSW | 5,941 | 222.5 | 6.3% |
| 3 | City of Gold Coast | QLD | 3,976 | 3.0 | 8.4% |
| 4 | City of Melbourne | VIC | 3,080 | 82.1 | 6.6% |
| 5 | Australian Capital Territory | ACT | 2,100 | 0.9 | 7.4% |
| 6 | Inner West Council | NSW | 1,839 | 52.2 | 7.5% |
| 7 | City of Canterbury Bankstown | NSW | 1,831 | 16.6 | 11.8% |
| 8 | Northern Beaches Council | NSW | 1,773 | 7.0 | 4.4% |
| 9 | Sunshine Coast Council | QLD | 1,726 | 0.8 | 6.5% |
| 10 | Yarra City Council | VIC | 1,662 | 85.2 | 4.7% |
| 11 | Central Coast Council | NSW | 1,528 | 0.9 | 0.5% |
| 12 | City of Parramatta | NSW | 1,493 | 17.8 | 4.4% |
| 13 | Port Phillip City Council | VIC | 1,472 | 71.5 | 4.5% |
| 14 | City of Casey | VIC | 1,394 | 3.4 | 13.0% |
| 15 | City of Monash | VIC | 1,379 | 16.9 | 5.5% |
| 16 | City of Blacktown | NSW | 1,364 | 5.7 | 13.4% |
| 17 | City of Stonnington | VIC | 1,327 | 51.6 | 10.2% |
| 18 | City of Greater Geelong | VIC | 1,325 | 1.1 | 11.7% |
| 19 | Wyndham City | VIC | 1,325 | 2.4 | 10.9% |
| 20 | City of Boroondara | VIC | 1,321 | 21.9 | -1.6% |
| 21 | Moreton Bay Regional Council | QLD | 1,276 | 0.6 | 9.2% |
| 22 | Moreland City Council | VIC | 1,269 | 24.9 | 9.7% |
| 23 | Cumberland Council | NSW | 1,169 | 16.1 | 6.6% |
| 24 | City of Darebin | VIC | 1,165 | 21.8 | 6.8% |
| 25 | Sutherland Shire Council | NSW | 1,153 | 3.5 | 1.9% |
| 26 | City of Stirling | WA | 1,087 | 10.4 | 9.6% |
| 27 | Bayside Council | NSW | 1,059 | 20.9 | 6.5% |
| 28 | Kingston City Council | VIC | 1,053 | 11.5 | 10.1% |
| 29 | Glen Eira City Council | VIC | 1,050 | 27.1 | 7.9% |
| 30 | The Hills Shire Council | NSW | 1,041 | 2.7 | 5.8% |
| 31 | City of Whitehorse | VIC | 1,037 | 16.1 | -1.5% |
| 32 | Hume City Council | VIC | 1,031 | 2.0 | 16.8% |
| 33 | Wollongong City Council | NSW | 1,023 | 1.5 | 6.1% |
| 34 | City of Newcastle | NSW | 1,019 | 5.5 | 3.7% |
| 35 | City of Greater Dandenong | VIC | 991 | 7.7 | 9.6% |
| 36 | City of Adelaide | SA | 983 | 63.0 | 6.8% |
| 37 | Mornington Peninsula Shire | VIC | 934 | 1.3 | 5.9% |
| 38 | City of Whittlesea | VIC | 922 | 1.9 | 10.2% |
| 39 | Randwick City Council | NSW | 883 | 24.3 | 0.9% |
| 40 | Fairfield City Council | NSW | 880 | 8.7 | 9.0% |
| 41 | City of Brimbank | VIC | 867 | 7.0 | 9.5% |
| 42 | Georges River Council | NSW | 861 | 22.5 | 0.7% |
| 43 | Cairns Regional Council | QLD | 852 | 0.5 | 8.1% |
| 44 | Moonee Valley City Council | VIC | 845 | 19.6 | 8.3% |

*Table 6: Core NTE Establishments in 2021/22 – part 2*

| Position | LGA Name | State | Core NTE Establishments | Per km² | % Change 21-22 |
|---|---|---|---|---|---|
| 45 | Liverpool City Council | NSW | 840 | 2.7 | 7.0% |
| 46 | City of Ryde | NSW | 820 | 20.2 | 4.6% |
| 47 | Manningham City Council | VIC | 818 | 7.2 | 1.1% |
| 48 | Maribyrnong City Council | VIC | 811 | 26.0 | 8.9% |
| 49 | Waverley Council | NSW | 797 | 84.8 | 3.0% |
| 50 | North Sydney Council | NSW | 762 | 72.6 | -1.3% |
| 51 | Knox City Council | VIC | 726 | 6.4 | 2.5% |
| 52 | City of Ballarat | VIC | 725 | 1.0 | 27.0% |
| 53 | Penrith City Council | NSW | 712 | 1.8 | 15.4% |
| 54 | Lake Macquarie City Council | NSW | 683 | 1.1 | 1.3% |
| 55 | City of Canada Bay Council | NSW | 673 | 33.8 | 0.6% |
| 56 | Willoughby Council | NSW | 670 | 29.9 | -2.9% |
| 57 | Townsville City Council | QLD | 669 | 0.2 | 6.9% |
| 58 | City of Perth | WA | 649 | 47.4 | 1.9% |
| 59 | City of Hobart | TAS | 644 | 8.3 | 4.5% |
| 60 | Bayside City Council | VIC | 644 | 17.3 | -5.4% |
| 61 | Hornsby Shire Council | NSW | 627 | 1.4 | -0.3% |
| 62 | Banyule City Council | VIC | 618 | 9.9 | 4.2% |
| 63 | Toowoomba Regional Council | QLD | 615 | 0.0 | 6.8% |
| 64 | Ku-ring-gai Council | NSW | 604 | 7.1 | 1.9% |
| 65 | City of Charles Sturt | SA | 594 | 10.8 | 12.3% |
| 66 | Melton City Council | VIC | 576 | 1.1 | 14.5% |
| 67 | Woollahra Municipal Council | NSW | 575 | 46.7 | 5.3% |
| 68 | City of Frankston | VIC | 553 | 4.3 | 11.7% |
| 69 | City of Joondalup | WA | 549 | 5.6 | 2.6% |
| 70 | Hobsons Bay City Council | VIC | 540 | 8.4 | 9.3% |
| 71 | Campbelltown City Council | NSW | 530 | 1.7 | 11.6% |
| 72 | City of Darwin | NT | 490 | 4.4 | 11.9% |
| 73 | Maroondah City Council | VIC | 482 | 7.9 | 7.6% |
| 74 | City of Greater Bendigo | VIC | 478 | 0.2 | 6.9% |
| 75 | Byron Shire | NSW | 472 | 0.8 | 8.5% |
| 76 | Port Macquarie-Hastings Council | NSW | 372 | 0.1 | 2.5% |
| 77 | City of Launceston | TAS | 360 | 0.3 | 2.3% |
| 78 | Burwood Council | NSW | 339 | 47.7 | 7.6% |
| 79 | Nillumbik Shire Council | VIC | 325 | 0.8 | 10.9% |
| 80 | Hawkesbury City Council | NSW | 323 | 0.1 | 8.8% |
| 81 | Mackay Regional Council | QLD | 320 | 0.0 | -0.6% |
| 82 | Maitland City Council | NSW | 283 | 0.7 | 2.2% |
| 83 | Port Stephens Council | NSW | 273 | 0.3 | 6.6% |
| 84 | City of Burnside | SA | 268 | 9.7 | 5.1% |
| 85 | City of Mitcham | SA | 257 | 3.4 | 5.3% |
| 86 | Albury City Council | NSW | 252 | 0.8 | 2.9% |
| 87 | Queanbeyan-Palerang Regional Council | NSW | 236 | 0.0 | 11.8% |
| 88 | Bathurst Regional Council | NSW | 173 | 0.0 | 13.1% |
| 89 | City of Wodonga | VIC | 142 | 0.3 | 2.9% |

# Sector breakdown by state / territory

*Table 7: Food by state/territory in 2021/22 with change from 2020/21 to 2021/22*

| State/Territory | Establishments | | Employment | | Turnover ($m) | |
|---|---|---|---|---|---|---|
| | Number | % Change 21-22 | Number | % Change 21-22 | Number | % Change 21-22 |
| New South Wales | 27,114 | 4.0% | 166,855 | 7.4% | $21,722 | 6.2% |
| Victoria | 24,473 | 3.7% | 191,435 | 1.6% | $20,057 | 7.4% |
| Queensland | 14,018 | 5.2% | 144,720 | -2.0% | $16,192 | 14.9% |
| Western Australia | 6,965 | 3.9% | 90,810 | 13.3% | $10,079 | 7.1% |
| South Australia | 4,637 | 5.2% | 46,340 | -7.9% | $5,755 | 6.4% |
| Tasmania | 1,587 | 4.0% | 16,160 | -16.5% | $1,717 | 8.9% |
| Australian Capital Territory | 1,465 | 8.0% | 21,420 | -7.9% | $2,398 | 5.9% |
| Northern Territory | 566 | 12.7% | 10,430 | 12.5% | $1,214 | 21.6% |
| Australia | 80,863 | 4.3% | 688,170 | 2.1% | $79,133 | 8.6% |

*Source: Based on Australian Bureau of Statistics CABEE 2017-2022 dataset*

*Table 8: Drink by state/territory in 2021/22 with change from 2020/21 to 2021/22*

| State/Territory | Establishments | | Employment | | Turnover ($m) | |
|---|---|---|---|---|---|---|
| | Number | % Change 21-22 | Number | % Change 21-22 | Number | % Change 21-22 |
| New South Wales | 3,253 | 4.3% | 36,360 | 7.3% | $7,486 | 2.0% |
| Victoria | 2,750 | 4.5% | 27,415 | 0.2% | $5,137 | 4.0% |
| Queensland | 1,174 | 5.6% | 20,945 | -2.5% | $2,811 | 12.0% |
| Western Australia | 1,000 | 5.9% | 19,620 | 13.9% | $3,467 | 4.2% |
| South Australia | 857 | 4.3% | 10,880 | -7.5% | $1,941 | 5.3% |
| Tasmania | 230 | 6.0% | 2,925 | -14.5% | $450 | 11.5% |
| Australian Capital Territory | 133 | 19.8% | 2,295 | -3.4% | $380 | 20.0% |
| Northern Territory | 55 | 10.0% | 2,600 | 8.3% | $314 | 17.1% |
| Australia | 9,457 | 4.8% | 123,040 | 2.6% | $21,985 | 4.9% |

*Source: Based on Australian Bureau of Statistics CABEE 2017-2022 dataset*

*Table 9: Leisure & Entertainment by state/territory in 2021/22 with change from 2020/21 to 2021/22*

| State/Territory | Establishments | | Employment | | Turnover ($m) | |
|---|---|---|---|---|---|---|
| | Number | % Change 21-22 | Number | % Change 21-22 | Number | % Change 21-22 |
| New South Wales | 14,222 | 7.6% | 90,215 | 0.1% | $13,931 | 11.1% |
| Victoria | 12,215 | 16.6% | 53,375 | -23.3% | $12,198 | 14.4% |
| Queensland | 7,576 | 11.6% | 50,895 | 7.3% | $9,498 | 20.0% |
| Western Australia | 3,415 | 11.4% | 23,480 | 9.8% | $3,993 | 10.9% |
| South Australia | 2,139 | 13.9% | 13,470 | -7.5% | $2,315 | 13.0% |
| Tasmania | 676 | 10.8% | 4,070 | -3.9% | $933 | 13.6% |
| Australian Capital Territory | 502 | 3.1% | 6,315 | -6.7% | $1,057 | 7.6% |
| Northern Territory | 270 | 14.4% | 4,860 | 29.4% | $1,038 | 21.1% |
| Australia | 41,053 | 11.6% | 246,685 | -4.3% | $44,963 | 14.0% |

*Source: Based on Australian Bureau of Statistics CABEE 2017-2022 dataset*


THEATRE
STAGE DOOR