Measuring the Australian Night Time Economy 2018

September 2019

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Glossary of terms

This section lays out the key terms referred to in this report and their meaning.

Term	Definition
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.
Employment	The number of employees associated with the establishment(s). Elements of charts and infographics relating to employment throughout this report are coloured red.
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.
LGA	Local Government Area – usually a city council or shire area. Each section in this report reviews the trend within the listed LGA. Please note that LGAs are not homogenous in terms of population size, geographic scale or density of establishments, which can make comparisons difficult.
LGSCN	Local Government Safe Cities Network – a committee operated by the Council of Capital Cities Lord Mayors (CCCLM).
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.

Sector	Description
Core NTE	The activities that provide primary establishment services to NTE leisure users in the evening (6pm to midnight) and night-time (midnight to 6am). The Core NTE is split into sub-sectors of Drink, Entertainment and Food.
Non-Core NTE	Establishments that primarily operate during the day but may provide integral services to the Core NTE, such as public and private transport, hotels and other forms of accommodation, retail services and public services such as policing, health services, parking and lighting. These tend to be presented at a higher aggregated data level due to availability of data at a more detailed level. Non-Core indicates the scale of the supply chain with which the Core NTE is linked.
Supply NTE	As with Non-Core NTE these establishment types tend to operate during the day but are part of the Core NTE supply chain through the production or wholesaling of Food, Drink or Entertainment products for resale. Similar to Non-Core NTE, these activities are presented as an aggregate.
Non-NTE	This refers to all the other economic activities outside the NTE definition.
Total Economy	Refers to the sum of all economic activity within a defined geography.

Please note that within this document several charts present the trend in establishments, employment and turnover in an indexed manner, so that the quantum of the figures is expressed such that the individual trends can be compared. Figures are indexed to the earliest point in the time series (often 2009, with 2009 equal to 100) with performance in subsequent years shown relative to this starting point.

The Australian Night Time Economy

Introduction

Cities are becoming increasingly interested in supporting the development of their Night Time Economies (NTEs), not only in Australia but globally. Examples of this can be seen across the world in cities such as New York[1], London[2], Toronto[3], Cali[4], Beijing[5] and Tokyo[6]. This rising interest in the NTE is seen in the global trend of appointing individuals to champion and guide cities' NTEs. These roles have various titles from Night Mayor, to Night Czar, Night Time Coordinator, Nightlife Director and Night Time Economy Manager.

The NTE is not only a growth sector in Australia, but one which is also highly complex. It encompasses a variety of business activities, which service a wide range of consumer needs on any given night. These may include, for example, shift workers traveling for work or working into the evening in industries such as health, security or hospitality; people wanting to enjoy new experiences or have a night out with friends or family; those hoping to expand their social networks and meet new people and those who may seek a quiet night in with a bottle of wine and a take-away.

Rapidly evolving social trends are likely to be impacting on cities' NTEs. For example, consumption of alcohol in Australia has recently fallen to the lowest levels since the 1960s[7], people aged between 18 and 24 are drinking less frequently than those in older age categories[8] and the range of non-alcoholic after dark activities appears to be expanding[9].

Knowledge of the scale and mix of an NTE is becoming increasingly important for policy makers working across a variety of agendas, including public health, economics, community safety, crime prevention, planning, transport and creative and leisure industries. This knowledge is needed to help facilitate policies to promote vibrant but safe NTEs which cater for diverse audiences.

Australia has led the way in commissioning consistent research into the value and structure of its NTE since 2009 through the Council of Capital City Lord Mayors (CCCLM)'s Local Government Safe Cities Network.

This report continues this research with a summary of key findings relating to Core NTE performance over the 2017 and 2018 financial years. This is presented at federal and state / territory level, followed by an executive summary for each current LGA member of the LGSCN.

[1] NYC Media & Entertainment, (2019), NYC's Nightlife Economy Impact, Assets, and Opportunities
[2] London Assembly, (2018), Rewrite the night: the future of London's night time economy
[3] City of Toronto, (2018), Night-time Economy - Stakeholder Consultation Results and Next Steps
[4] Public Sector Digest, (2016), The Rise of the Night Mayor
[5] Xinnhuanet, (2019), China Focus: Beijing to light up economy after dark
[6] Nikkei Asian Review (2018), Japan looks to Tokyo's nighttime economy to hit tourism goals
[7] Australian Bureau of Statistics, (2018), Alcohol consumption lowest in half a century
[8] Australian Institute of Health and Welfare (2017), National Drug Strategy Household Survey 2016: detailed findings
[9] Johnstone, R. (2018), Late-night activities that don't involve drinking, Time Out Melbourne

The Australian NTE

Of Australia's 2.3 million businesses in 2018, the Core NTE comprises of 108,601 establishments – accounting for 5% of the total business base. These Core NTE establishments employed over 1.1 million people in 2018 and generated close to $134 billion in turnover, representing 9% and 4% of the total economy respectively.

While historically the Core NTE in Australia has grown at a faster rate than that of the total economy, this looks to have slowed over the course of 2017 to 2018 (Figure 1). This is apparent across establishments (+2.5% Core NTE compared to +3.4% in the total economy) and employment (+2.1% / +2.9%) although turnover has performing similarly (+5.6% compared to +5.7%) and well above the rate of inflation[10].

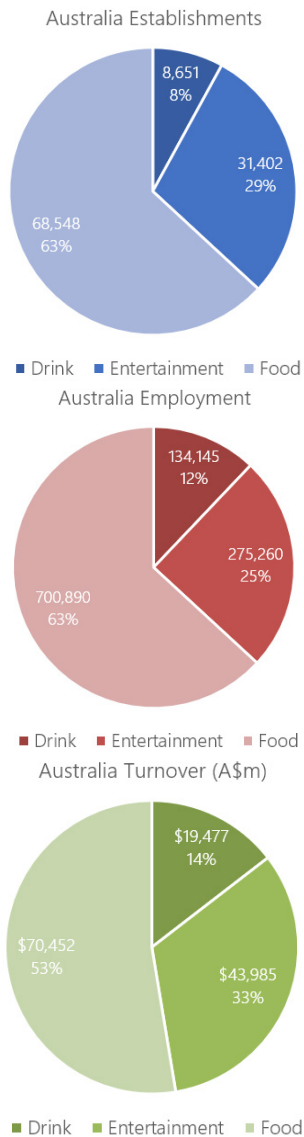| Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	108,061 +2.5%	4.7%
Employment	1,110,290 +2.1%	8.8%
Sales Turnover	$134bn +5.6%	3.8%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/A1

Figure 1: Change in Core NTE & Total Economy (2017 to 2018)

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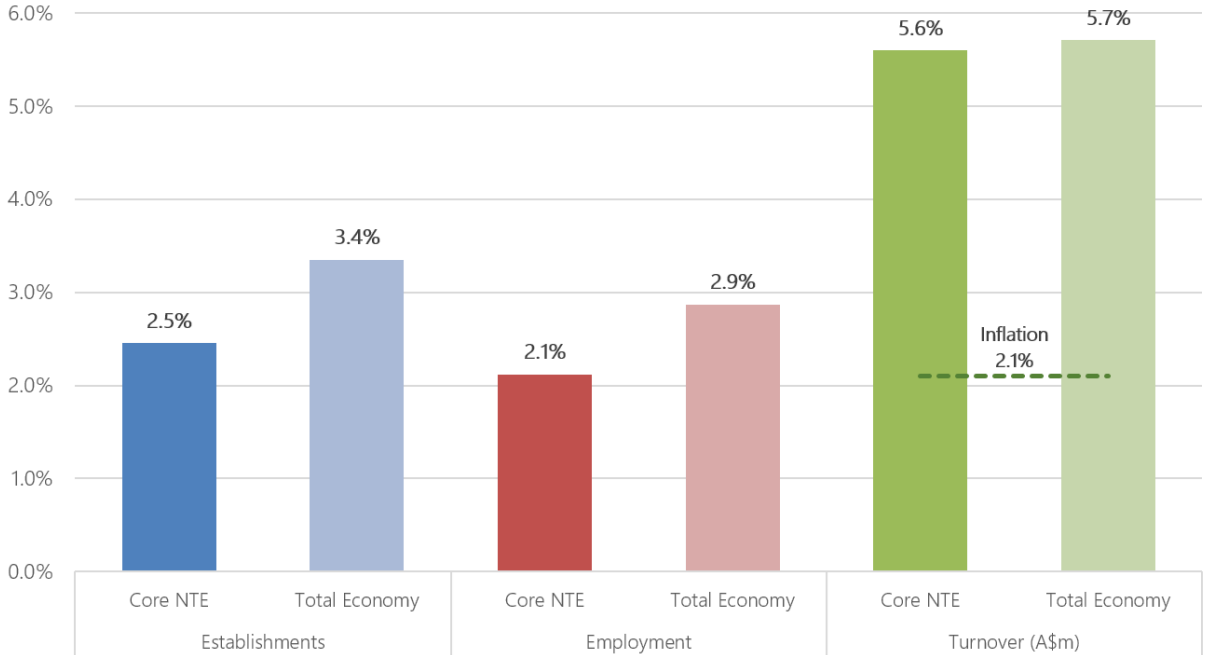
[10] Compared to an inflation rate of 2.1% (Reserve Bank of Australia Consumer Price Index June 2017 to 2018).

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Figure 2: Australia's Core NTE split by sub-sector

Australia Establishments

- Drink ■ Entertainment ■ Food

Australia Employment

- Drink ■ Entertainment ■ Food

Australia Turnover (A$m)

- Drink ■ Entertainment ■ Food

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/A1

Growth in the Food and Drink sub segments of the Core NTE sector has slowed slightly. The Entertainment sub-sector, however, has defied this trend. It experienced the greatest percentage growth of the three sub-sectors; particularly in the number of establishments (+3.3%) and employees (+3.4%), continuing the strong growth achieved between 2016 and 2017 (+2.8% establishments).

This growth in establishments has contributed to an increase in Entertainment's share of the Core NTE's employment, rising to 25% from 24% in 2017.

The Food sub-sector remains the largest sub-sector, with over 68,500 establishments in 2018, accounting for 63% of the Australian Core NTE establishments.

Following a strong trend between 2013 and 2017 (+4.5% per annum on average), growth in the Food sub-sector tapered off slightly between 2017 and 2018 (+2.3% establishments), which has affected overall Core NTE performance.

While Food and Entertainment have experienced establishment growth of around 2-3% since 2017, Drink establishments have grown at much slower rate (+0.7%). This is relatively consistent with growth in this activity over the last few years at +1.2% per annum on average.

As a result, the proportion of Core NTE establishments that are Drink related (8%) continues to decline.

The Australian NTE in the states and territories

In 2018, New South Wales and Victoria continue to be the largest contributors to the Australian Core NTE across establishments (34% and 28% respectively), employment (30% and 25%) and turnover (31% and 26%) (see Figure 3 and Table 1).

While New South Wales' Core NTE is among the largest, it has grown at a rate comparable to that of Australia across all key metrics. By comparison, Victoria has grown at faster rate across establishments (+3.3%), employment (+3.4%) and turnover (+6.9%), mirroring its performance between 2016 and 2017. This suggests that Victoria's share of the Australian Core NTE is likely to continue to increase over the coming years.

Figure 3: Core NTE establishments by state/territory 2018
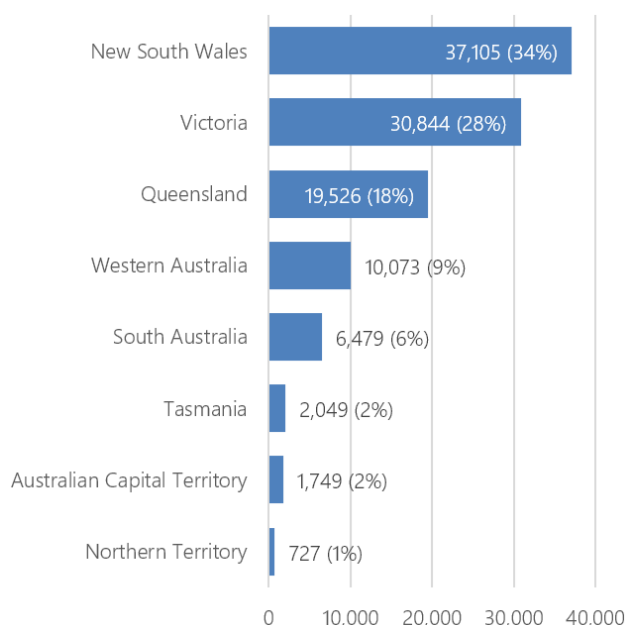
Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS2/2018_Charts

While the number of Core NTE establishments in Queensland and the territories increased at a faster rate than Australia as a whole between 2016 and 2017, this slowed in Queensland between 2017 and 2018 (+2.1%) and slightly reversed in both the Australian Capital Territory (-0.2%) and Northern Territory (-3.6%). The establishment declines in these areas have led to relatively static employment change (+0.7% and +0.1% respectively), with turnover increasing aided by inflation (+4.5% and +3.3%).
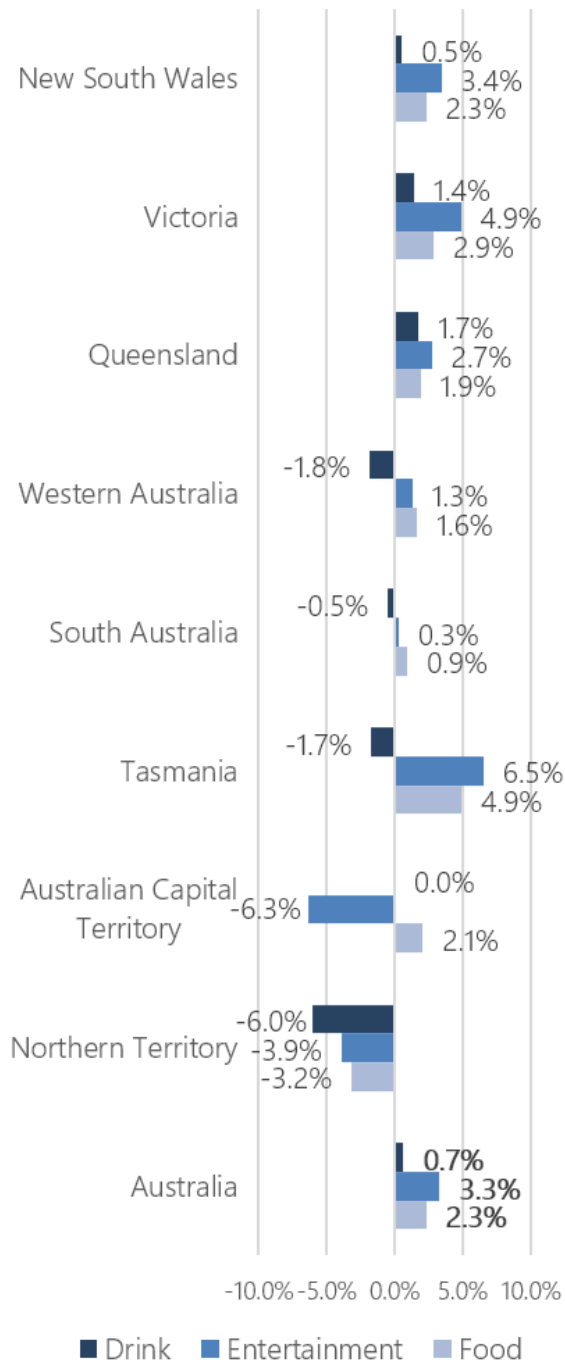
Table 1: Core NTE by state/territory in 2018 with change from 2017 to 2018

State/Territory	Establishments		Employment		Turnover ($m)	
	Number	% Change 17-18	Number	% Change 17-18	Number	% Change 17-18
New South Wales	37,105 ⬆	2.5%	337,565 ⬆	2.5%	$40,961 ⬆	6.0%
Victoria	30,844 ⬆	3.3%	279,920 ⬆	3.4%	$34,928 ⬆	6.9%
Queensland	19,526 ⬆	2.1%	224,910 ⬆	1.5%	$26,460 ⬆	4.7%
Western Australia	10,073 ⬆	1.2%	117,590 ⬆	0.6%	$14,168 ⬆	4.1%
South Australia	6,479 ⬆	0.6%	78,395 ⬆	2.1%	$9,014 ⬆	4.9%
Tasmania	2,049 ⬆	4.5%	23,565 ⬆	1.0%	$2,795 ⬆	5.7%
Australian Capital Territory	1,749 ⬇	-0.2%	29,915 ⬆	0.7%	$3,345 ⬆	4.5%
Northern Territory	727 ⬇	-3.6%	18,725 ⬆	0.1%	$2,244 ⬆	3.3%
Australia	108,601 ⬆	2.5%	1,110,590 ⬆	2.1%	$133,914 ⬆	5.6%

Source: Based on Australian Bureau of Statistics CABEE 2014-2018 dataset, Ref: WTS1/S5

Along with Victoria, Tasmania seems to be one of the few states that continues to grow its Core NTE establishment base at a faster rate than the national average, although this has not flowed through to equivalent growth in employment (+1.0%) and turnover (+5.7%).

Figure 4: Change in Core NTE establishments, by sub-sector 2017 to 2018

New South Wales
- 0.5%
- 3.4%
- 2.3%

Victoria
- 1.4%
- 4.9%
- 2.9%

Queensland
- 1.7%
- 2.7%
- 1.9%

Western Australia
- -1.8%
- 1.3%
- 1.6%

South Australia
- -0.5%
- 0.3%
- 0.9%

Tasmania
- -1.7%
- 6.5%
- 4.9%

Australian Capital Territory
- 0.0%
- -6.3%
- 2.1%

Northern Territory
- -6.0%
- -3.9%
- -3.2%

Australia
- 0.7%
- 3.3%
- 2.3%

-10.0% -5.0% 0.0% 5.0% 10.0%

■ Drink ■ Entertainment ■ Food

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS2/2018_Charts

As noted in the previous section (Figure 2), the largest sub-sector in the Core NTE is Food and this is common across all of the states and territories. As a result, this sub-sector is a key driver of growth within each Core NTE.

Growth in the Food sub-sector slowed between 2017 and 2018, impacting on Australia's Core NTE growth, and this appears to be common across each of the states to varying degrees. The only state that has maintained its strong expansion of Food establishments is Tasmania (+4.7% compared to +4.5% from 2016 to 2017).

While Food was the sub-sector with the strongest growth between 2016 and 2017, Entertainment led the way over the 2017 to 2018 period. This was the case across all states, particularly New South Wales (+3.4%), Victoria (+4.9%) and Tasmania (+6.5%). While all states have shown strong Entertainment growth, territories have experienced establishment decline, particularly Australian Capital Territory (-6.3%).

As highlighted earlier, growth in the Drink sub-sector has continued its trend of marginal growth between 2017 and 2018 and this is the case across the larger states, with only Victoria and Queensland exhibiting growth over 1%. Western Australia, South Australia and Tasmania have all experienced declines in their Drink sub-sectors while achieving growth in other sub-sectors, suggesting a shift in the mix of activities for these states.

By comparison, Northern Territory has experienced decline in its Core NTE establishment base across all three sub-sectors – particularly in Drink – indicating some movement in activity mix but primarily an overall reduction in the sector. Full details of establishments, employment and turnover for each state or territory are provided overleaf (Table 2, Table 3 and Table 4), along with change between 2017 and 2018 for each metric (establishments, employment and turnover).

Table 2: Drink by state/territory in 2018 with change from 2017 to 18

State/Territory	Establishments			Employment			Turnover ($m)		
	Number		% Change 17-18	Number		% Change 17-18	Number		% Change 17-18
New South Wales	2,926	⬆	0.5%	44,495	⬆	2.1%	$6,820	⬆	4.8%
Victoria	2,405	⬆	1.4%	28,290	⬆	0.7%	$4,496	⬆	5.5%
Queensland	1,163	⬆	1.7%	24,710	⬆	1.5%	$2,960	⬆	4.4%
Western Australia	962	⬇	-1.8%	16,840	⬇	-2.5%	$2,674	⬆	1.5%
South Australia	788	⬇	-0.5%	11,990	⬆	0.4%	$1,555	⬆	2.6%
Tasmania	230	⬇	-1.7%	3,385	⬇	-7.0%	$441	⬆	1.4%
Australian Capital Territory	110	➡	0.0%	1,995	⬇	-7.2%	$276	⬆	0.6%
Northern Territory	47	⬇	-6.0%	2,430	⬆	0.6%	$255	⬆	5.0%
Australia	8,651	⬆	0.7%	134,130	⬆	0.6%	$19,477	⬆	4.1%

Source: Based on Australian Bureau of Statistics CABEE 2013-2017 dataset, Ref: WTS1/S5

Table 3: Entertainment by state/territory in 2018 with change from 2017 to 18

State/Territory	Establishments			Employment			Turnover ($m)		
	Number		% Change 17-18	Number		% Change 17-18	Number		% Change 17-18
New South Wales	11,408	⬆	3.4%	94,080	⬆	4.5%	$14,144	⬆	7.2%
Victoria	8,663	⬆	4.9%	69,270	⬆	3.9%	$12,107	⬆	6.7%
Queensland	5,782	⬆	2.7%	58,470	⬆	2.4%	$9,257	⬆	4.5%
Western Australia	2,674	⬆	1.3%	20,165	⬆	3.6%	$3,395	⬆	5.9%
South Australia	1,676	⬆	0.3%	15,380	⬆	4.0%	$2,331	⬆	4.7%
Tasmania	556	⬆	6.5%	5,245	⬆	1.4%	$853	⬆	6.2%
Australian Capital Territory	413	⬇	-6.3%	6,580	⬇	-4.9%	$925	⬇	-0.4%
Northern Territory	222	⬇	-3.9%	6,195	⬆	1.1%	$974	⬆	3.0%
Australia	31,402	⬆	3.3%	275,380	⬆	3.4%	$43,985	⬆	6.0%

Source: Based on Australian Bureau of Statistics CABEE 2013-2017 dataset, Ref: WTS1/S5

Table 4: Food by state/territory in 2018 with change from 2017 to 18

State/Territory	Establishments			Employment			Turnover ($m)		
	Number		% Change 17-18	Number		% Change 17-18	Number		% Change 17-18
New South Wales	22,771	⬆	2.3%	198,995	⬆	1.7%	$19,997	⬆	5.5%
Victoria	19,776	⬆	2.9%	182,360	⬆	3.6%	$18,325	⬆	7.5%
Queensland	12,581	⬆	1.9%	141,735	⬆	1.1%	$14,243	⬆	4.9%
Western Australia	6,437	⬆	1.6%	80,590	⬆	0.5%	$8,098	⬆	4.3%
South Australia	4,015	⬆	0.9%	51,030	⬆	1.9%	$5,128	⬆	5.7%
Tasmania	1,263	⬆	4.9%	14,935	⬆	2.9%	$1,501	⬆	6.7%
Australian Capital Territory	1,226	⬆	2.1%	21,340	⬆	3.5%	$2,144	⬆	7.3%
Northern Territory	458	⬇	-3.2%	10,105	⬇	-0.5%	$1,015	⬆	3.2%
Australia	68,548	⬆	2.3%	701,080	⬆	2.0%	$70,452	⬆	5.8%

Source: Based on Australian Bureau of Statistics CABEE 2013-2017 dataset, Ref: WTS1/S5

The NTE in Australian Capital Territory

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	1,749 -0.2%	6.1%
Employment	29,915 +0.7%	12.9%
Sales Turnover	$3,345m +4.5%	5.7%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S1

Following continuous development from 2013 to 2017 and some of the strongest growth rates in Australia between 2016 and 2017, the number of Core NTE establishments remained relatively static between 2017 and 2018.

The Australian Capital Territory (ACT) Core NTE experienced a slight decline in establishments (-0.2%), and only small increases in employment (+0.7%) and turnover (+4.5%) from 2017 to 2018.

The Australian Capital Territory has an above average concentration of Food establishments, representing 70% of the Core NTE (rising from 62% in 2009). It was the only sub-sector to experience growth between 2017 and 2018, which has helped maintain Core NTE employment and turnover; with Entertainment establishments (24% of Core NTE) declining (-6.3%) since 2017 and Drink remaining effectively unchanged since 2009 (6% Core NTE).

Figure 5: Change in ACT's Core NTE 2017-18

Canberra Night Noodle Market

As noted above, Food was the only sub-sector to experience growth, with establishments (+2.1%), employment (+3.5%) and turnover (+7.3%) all increasing between 2017 and 2018, continuing the robust trends shown since 2014 (Figure 6).

Figure 6: Trend in ACT's Food sub-sector

● Establishments - Indexed ● Employment - Indexed ● Turnover - Indexed
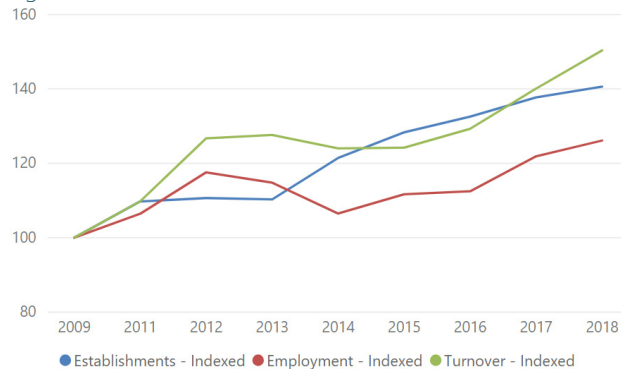
The decline in Entertainment establishments was driven by losses in creative and performing arts (-5% / -10), hospitality clubs (-17% / -8) and horse and dog racing activities (-54% / -7). Entertainment's share of the Core NTE has reduced to 24% (from 25% in 2017) as a result.

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	110 +0.0%	6%
Entertainment	413 -6.3%	24%
Food	1,226 +2.1%	70%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S3

For more information see Table 9 in the appendix.

In summary, ACT's Core NTE has remained relatively static between 2017 and 2018, due to large losses in Entertainment and Drink while Food continues its established run of growth. Food remains particularly important to ACT's Core NTE, with a much higher prevalence compared to that of Australia as a whole.

The NTE in New South Wales

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	37,105 +2.5%	4.7%
Employment	337,565 +2.5%	8.4%
Sales Turnover	$40,961m +6.0%	3.7%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S1

New South Wales (NSW) continues to be the largest contributor to Australia's Core NTE, with 34% of Core NTE establishments, 30% of employment and 31% of turnover.

The distribution of New South Wales' Core NTE is similar to that of Australia (Figure 7), which is not unsurprising given its major contribution to the Australian NTE. However, this distribution does seem to be shifting towards a greater Entertainment focus, with 31% of Core NTE establishments being based in this sub-sector; increasing from 30% in 2017. By comparison, 8% of Core NTE establishments are Drink based, which has remained unchanged since 2017, while 61% are in Food, which has declined from 62% in 2017.

Figure 7: NSW's establishments by sub-sector

New South Wales

Drink 8%
Entertainment 31%
Food 61%

● Food ● Entertainment ● Drink

Drink 8%
Entertainment 29%
Food 63%

Australia
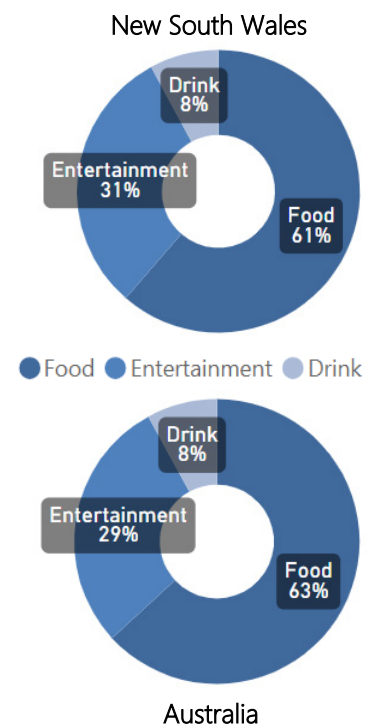
Between 2017 and 2018 the Core NTE in New South Wales grew across establishments (+2.5%), employment (+2.5%) and turnover (+6.0%). These growth rates are similar to those that have occurred nationally (+2.5% in establishments, +2.1% in employment and +5.6% in turnover). This is not unexpected given the state is a large contributor to Australia's overall Core NTE. As noted on the previous page, the main driver of this growth is the Entertainment sub-sector, which has increased across all metrics.

Entertainment establishments in New South Wales increased by 3.4% over the 2017 to 2018 period (compared to +3.3% nationally), which led to similar expansions in employment (+4.5% compared to +3.4% nationally) and strong growth in turnover (+7.2% compared to +6.0%).

While Entertainment has shown the greatest percentage increase, it is worth noting that the Food sub-sector is the largest in Australia and has also experienced establishment growth of 2.3% between 2017 and 2018. While strong, this growth rate has slowed compared to previous years (3.5% per annum on average since 2014).

In summary, New South Wales' Core NTE is the largest among all the states and territories and experienced similar growth between 2017 and 2018 to the Core NTE in Australia as a whole. It's Core NTE distribution is comparable to that of Australia but looks to be shifting towards a greater Entertainment focus, with this sub-sector having the strongest growth between 2017 and 2018.

Figure 8: Indexed trend in NSW's Core NTE
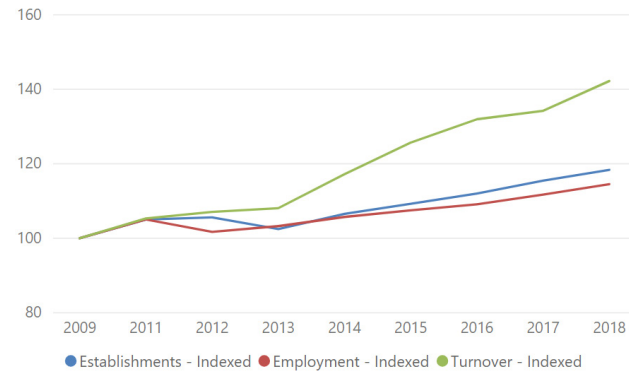
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	2,926 +0.5%	8%
Entertainment	11,408 +3.4%	31%
Food	22,771 +2.3%	61%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S3

For more information see Table 10 in the appendix.

Central Coast Council

| Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	1,272 +7.0%	5.4%
Employment	8,875 +4.0%	8.7%
Sales Turnover	$955m +11.0%	3.0%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Central Coast has the tenth largest Core NTE, measured by the number of establishments.

Central Coast's Core NTE has a similar number of Food establishments, greater proportion of Entertainment establishments and a smaller proportion of Drink establishments compared to New South Wales and Australia (Figure 9).

The Core NTE in Central Coast grew at a much faster rate between 2017 and 2018 when compared to New South Wales across establishments (+7.0% compared to +2.5% in New South Wales), employment (+4.0% compared to +2.5%) and turnover (+7.8% compared to +1.7%).

*Figure 9: Central Coast and NSW split by sub-sector*

Central Coast

Drink 6%
Entertainment 34%
Food 61%

NSW

Drink 8%
Entertainment 31%
Food 61%
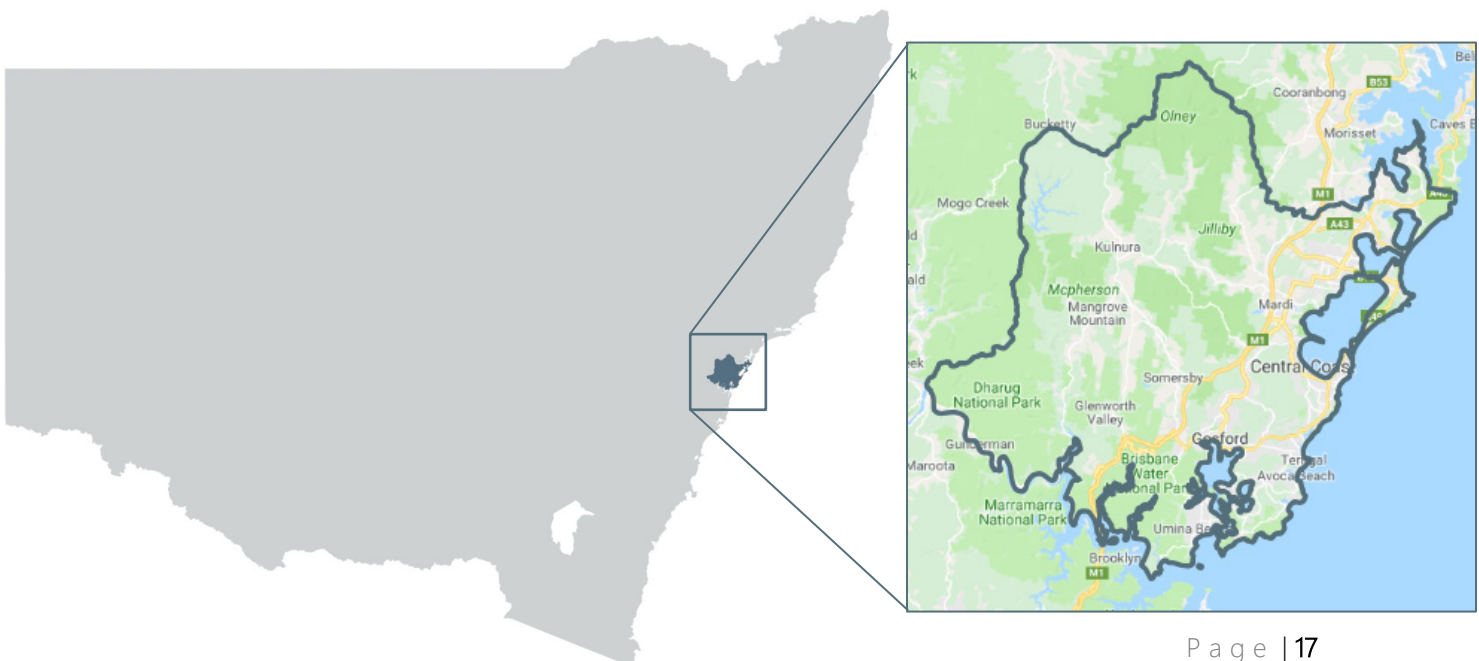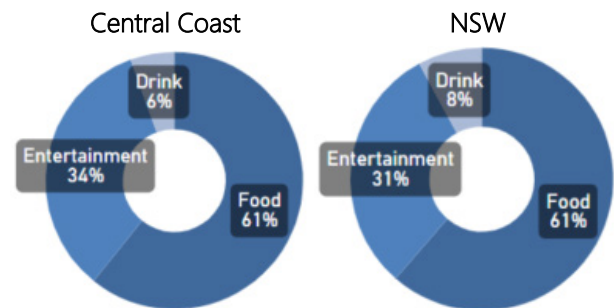
Central Coast

Establishment growth was experienced across all sub-sectors. Entertainment had the greatest change (+12.3% / +47), followed by Food (+4.2% / +31) and Drink (+7.7% / +5). Similarly, employment growth was experienced in Entertainment (+8.3% / +215), Food (+0.7% / +35) and Drink (+13.3% / +90).

Figure 10 shows the growth in Entertainment in Central Coast over the past couple of years. This has been driven by creative and performing arts activities, which gained an additional 41 (+22%) establishments, employing an additional 245 people (+57%) between 2017 and 2018.

Figure 10: Central Coast's Entertainment sub-sector
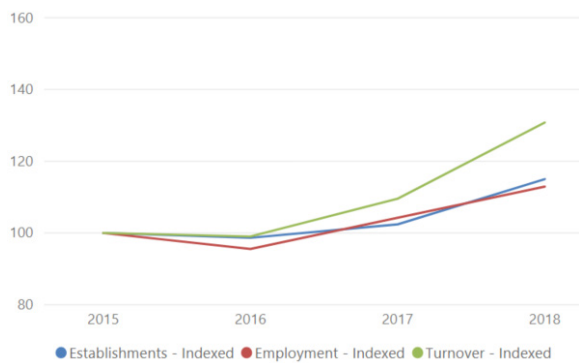
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	70 +7.7%	6%
Entertainment	429 +12.3%	34%
Food	773 +4.2%	61%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 11 in the appendix.

Georges River Council

| Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	759 -3.7%	4.8%
Employment	4,855 -3.4%	9.0%
Sales Turnover	$538m -2.2%	3.6%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Georges River has a strong Food sub-sector, ranking ninth in employment density among the 88 LGAs analysed.

Georges River Core NTE represents a similar proportion of the total economy (4.8%) compared to that of New South Wales (4.7%) and Australia (4.7%). This has remained fairly static over the past four years.

Within the Core NTE, the Food sub-sector represents a larger proportion of establishments (77%) compared to New South Wales (61%) while Entertainment (20%) and Drink (3%) represent a smaller proportion of establishments (Figure 12).

Figure 11: Georges River and NSW split by sub-sector

Georges River

Drink 3%
Entertainment 20%
Food 77%

NSW
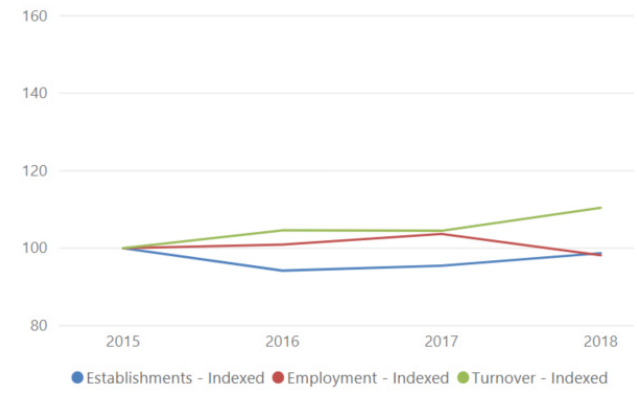
Drink 8%
Entertainment 31%
Food 61%
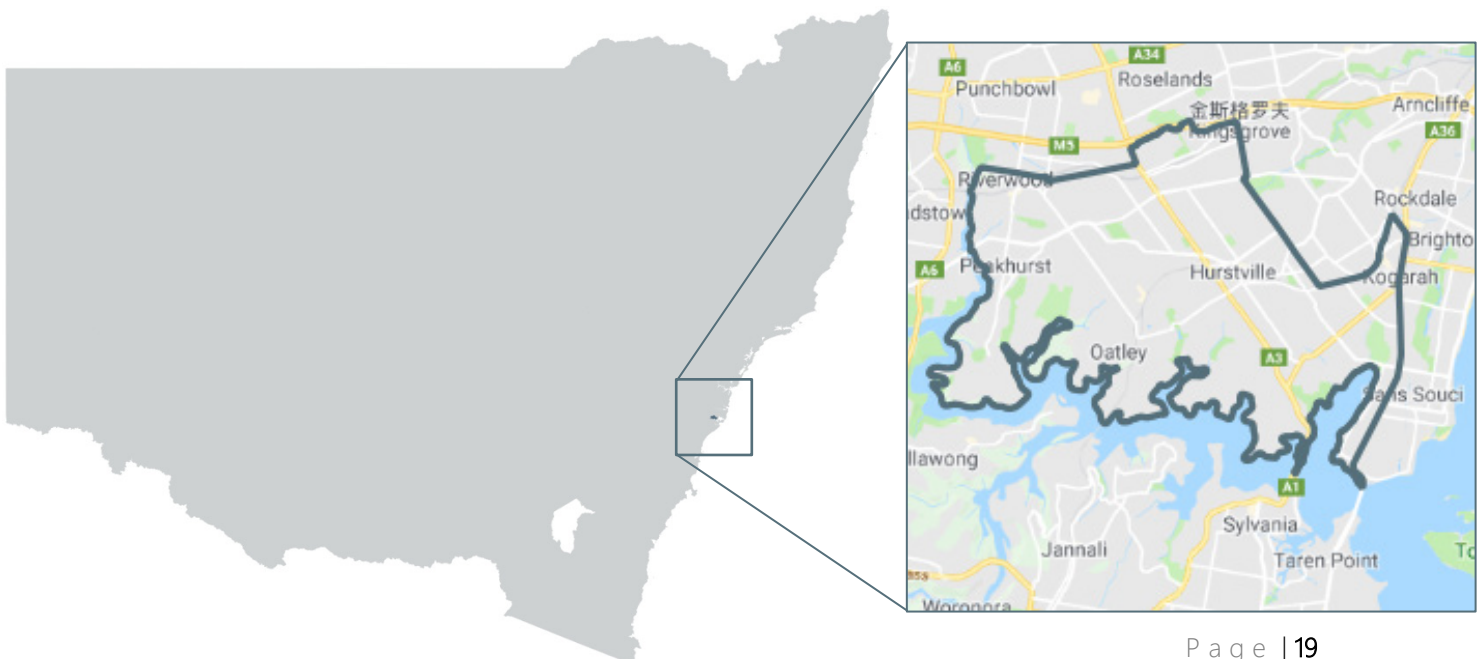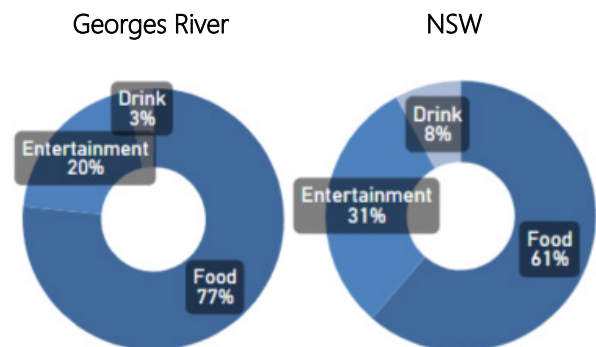
Georges River

Core NTE establishments in Georges River declined between 2017 and 2018 by -3.7% (-29), with similar losses in employment -3.4% (170), however turnover grew by 2.2% (+$12m).

Entertainment was the only sub-sector to have a growth in establishments. Despite this, employment in Entertainment establishments fell by -60 (-5.3%), as per Figure 12.

While Drink shows the greatest proportional losses, Food experienced the greatest total loss in the number of establishments (-29) and employment (-70).

Figure 12: Georges River's Entertainment sub-sector

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	25 -16.7%	3%
Entertainment	153 +3.4%	20%
Food	581 -4.8%	77%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 12 in the appendix.
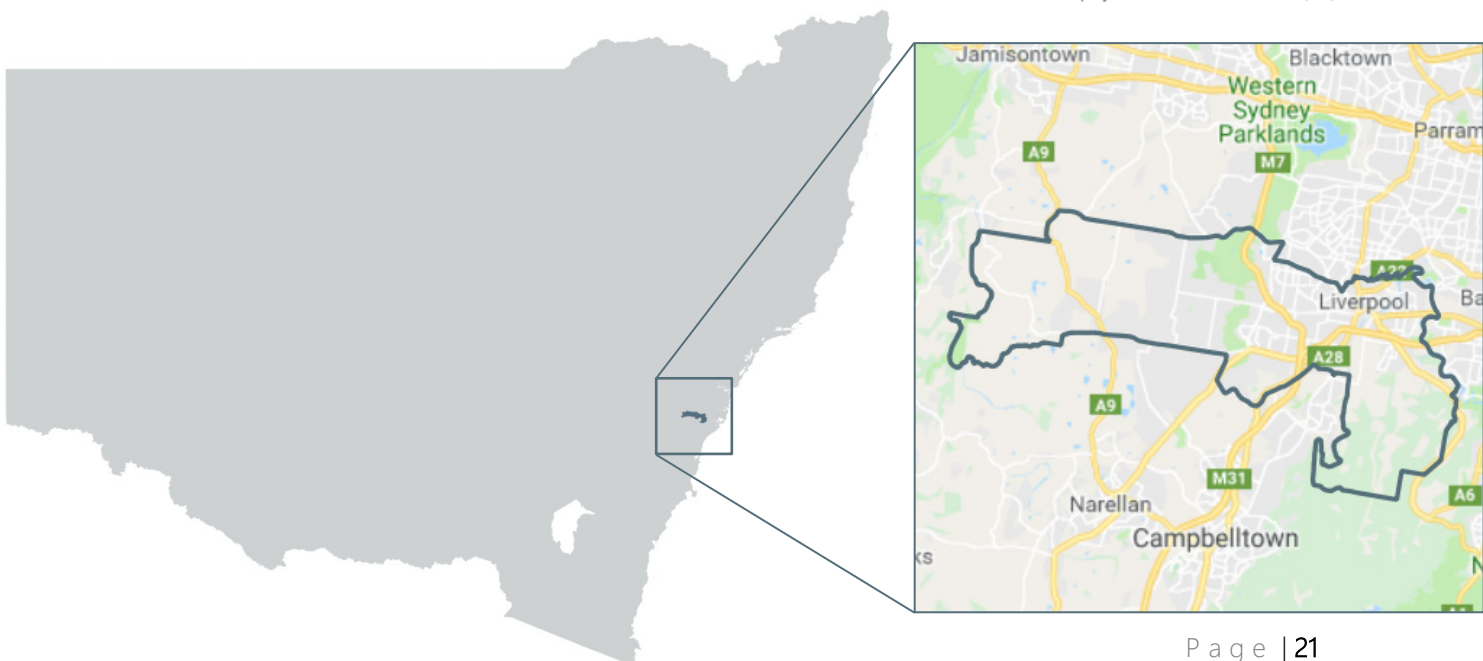
Liverpool City Council

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	630 +6.2%	3.8%
Employment	3,480 +8.5%	5.2%
Sales Turnover	$361m +13.5%	1.7%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Liverpool's Core NTE experienced strong growth in the number of establishments (+37), employees (+275) and turnover generated (+$43m) between 2017 and 2018.

The largest percentage increase in establishments (+33.3% / +8) was in the Drink sub-sector, which also experienced strong employment growth (+42.6% / +100). The Food sub-sector, however, experienced the strongest growth in the number of establishments (+6.5% / +28) and employment (+8.2% / +190). Entertainment establishments remained relatively stable by comparison.

*Figure 13: Liverpool Core NTE growth vs. NSW (17-18)*

Liverpool City Council

Liverpool's Food sub-sector makes up a higher proportion of its Core NTE (73%) when compared to New South Wales (61%) and Australia (63%). Employment (72%) and turnover (68%) are also higher in its Food sub-sector.

Recent growth in Liverpool's Food sub-sector has been driven by cafes and restaurants, with the addition of 23 new establishments in the LGA between 2017 and 2018 employing 165 employees and generating an additional $21.5m in turnover. Figure 14 shows that growth in Liverpool's Food sub-sector is part of an ongoing trend over the past four years.

Figure 14: Trend in Liverpool's Food sub-sector
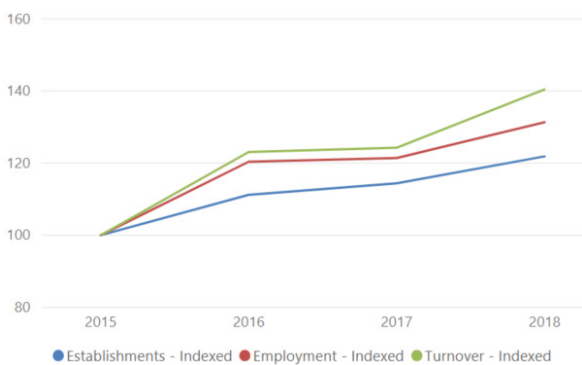
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	32 +33.3%	5%
Entertainment	141 +0.7%	22%
Food	457 +6.5%	73%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 13 in the appendix.

City of Newcastle

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	840 +2.2%	6.3%
Employment	13,280 +3.0%	13.7%
Sales Turnover	$1,588m +10.9%	5.7%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

In 2018, Newcastle had the eighth largest Drink sub-sector of the 88 LGAs analysed, measured by the number of establishments, falling from seventh place in 2017.

The Core NTE in Newcastle represents an above average proportion of its total economy compared to that of New South Wales and Australia. Newcastle also has a higher than average concentration of Drink establishments (14% of the Core NTE) compared to New South Wales (8%) and Australia (8%), driven primarily by pubs, taverns and bars rather than liquor retailing.

Figure 15: Newcastle and NSW split by sub-sector
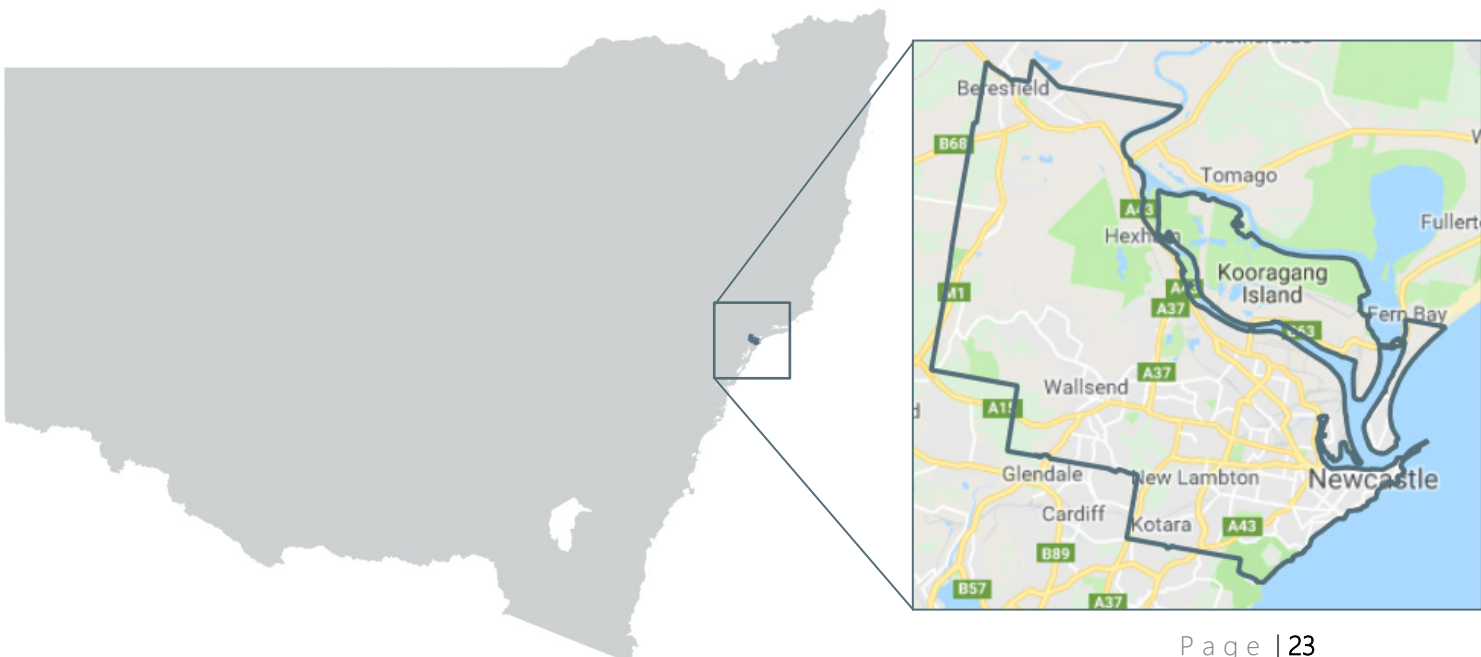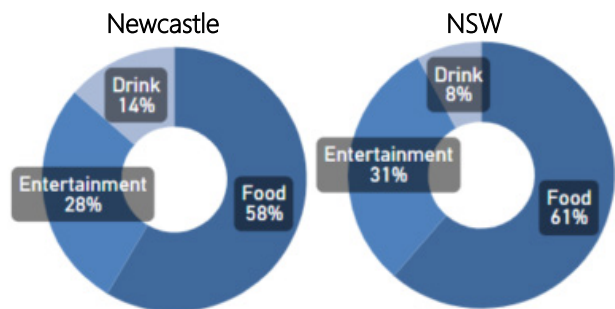
City of Newcastle

The proportion of Core NTE employment that is based in Drink establishments is higher than average, although turnover represents a lower proportion of the Core NTE than at the state or federal level.

Drink had the greatest proportional increase in establishments (+2.7% / +3), however, there were an additional 11 Food establishments (+2.3%). Entertainment did not experience particularly high growth in the number of establishments (+1.7% / +4), but there was strong growth in employment (5.4% / +185), and turnover also grew substantially (+19.2% / +98.6m).

Figure 16: Trend in Newcastle's Core NTE
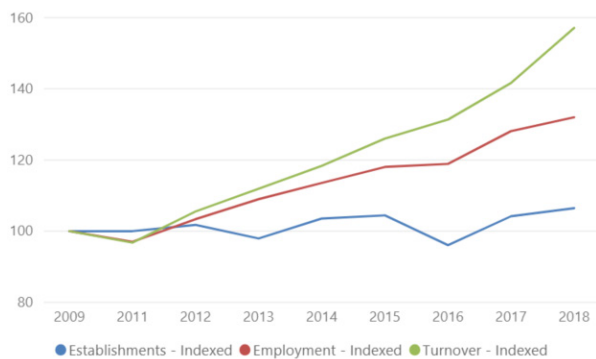
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	114 +2.7%	14%
Entertainment	235 +1.7%	28%
Food	491 +2.3%	58%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 14 in the appendix.

Northern Beaches Council

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	1,482 +4.5%	4.5%
Employment	9,010 +2.7%	7.0%
Sales Turnover	$995m +9.9%	2.6%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

In 2018, Northern Beaches has the sixth largest Core NTE and the fifth largest Entertainment sub-sector of the 88 LGAs analysed measured by the number of establishments.

Northern Beaches' Core NTE represents a smaller proportion of its total economy when compared to New South Wales and Australia as a whole. However, Northern Beaches' Core NTE has experienced positive growth between 2017 and 2018 across all sub-sectors and measures. Particularly strong growth has been observed in the Food sub-sector, as per Figure 17.

Figure 17: Trend in Northern Beaches' Food sub-sector

● Establishments - Indexed ● Employment - Indexed ● Turnover - Indexed
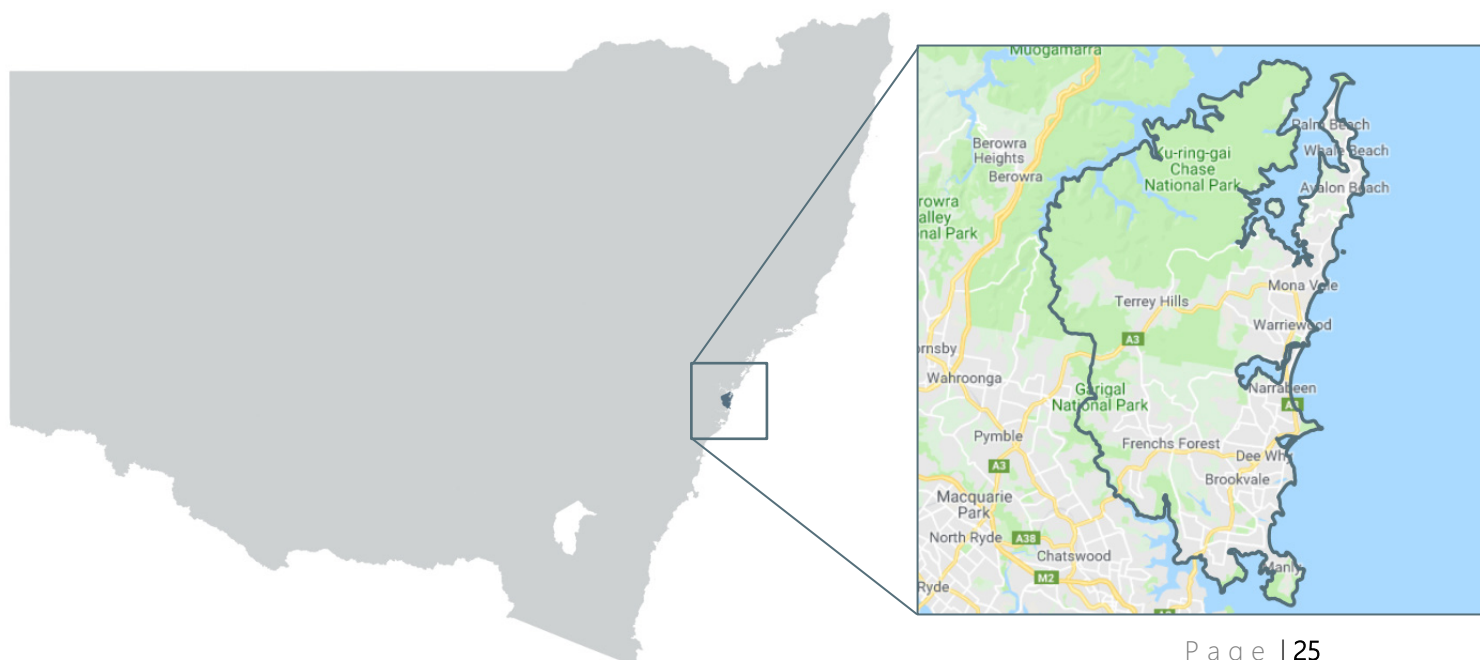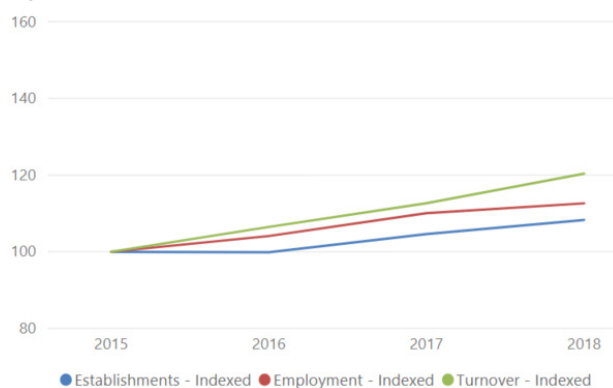
Northern Beaches

Northern Beaches' Entertainment sub-sector makes up a greater proportion of its Core NTE compared to New South Wales, as seen in Figure 18. This sub-sector had the largest increase in establishments between 2017 and 2018, driven by creative and performing arts activities (+21) and sports and physical recreation activities (+15).

While there were only an additional 4 Drink establishments, this sub-sector experienced the greatest proportional increase in employment (+11.7% / +95) and turnover (+15.4% / +19.1m).

Figure 18: Northern Beaches & NSW by sub-sector
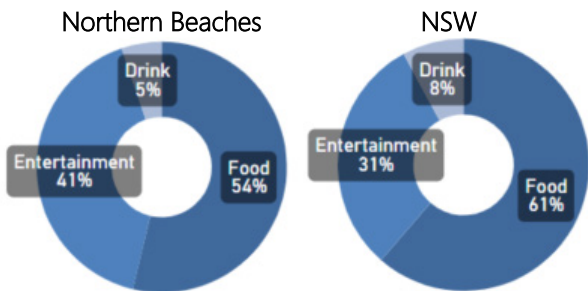
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	77 +5.5%	5%
Entertainment	609 +5.7%	41%
Food	796 +3.5%	54%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 15 in the appendix.

City of Parramatta

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	1,232 +5.2%	4.7%
Employment	8,500 +5.3%	7.9%
Sales Turnover	$1,155m +11.7%	3.5%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Parramatta's Food sub-sector is the sixth largest of the 88 LGAs analysed, in terms of the number of establishments, rising from seventh in 2017.

Parramatta's Core NTE grew between 2017 and 2018 in the measures of establishments, employment and turnover.

The greatest percentage establishment growth was observed in Entertainment (+8.9% / +20), while the greatest actual growth was in Food (+5.8% / +52). By comparison, the Drink sub-sector declined in establishments (-23.9%), employment (-27.4%) and turnover (-13.1%).

Figure 19: Trend in Parramatta's Core NTE
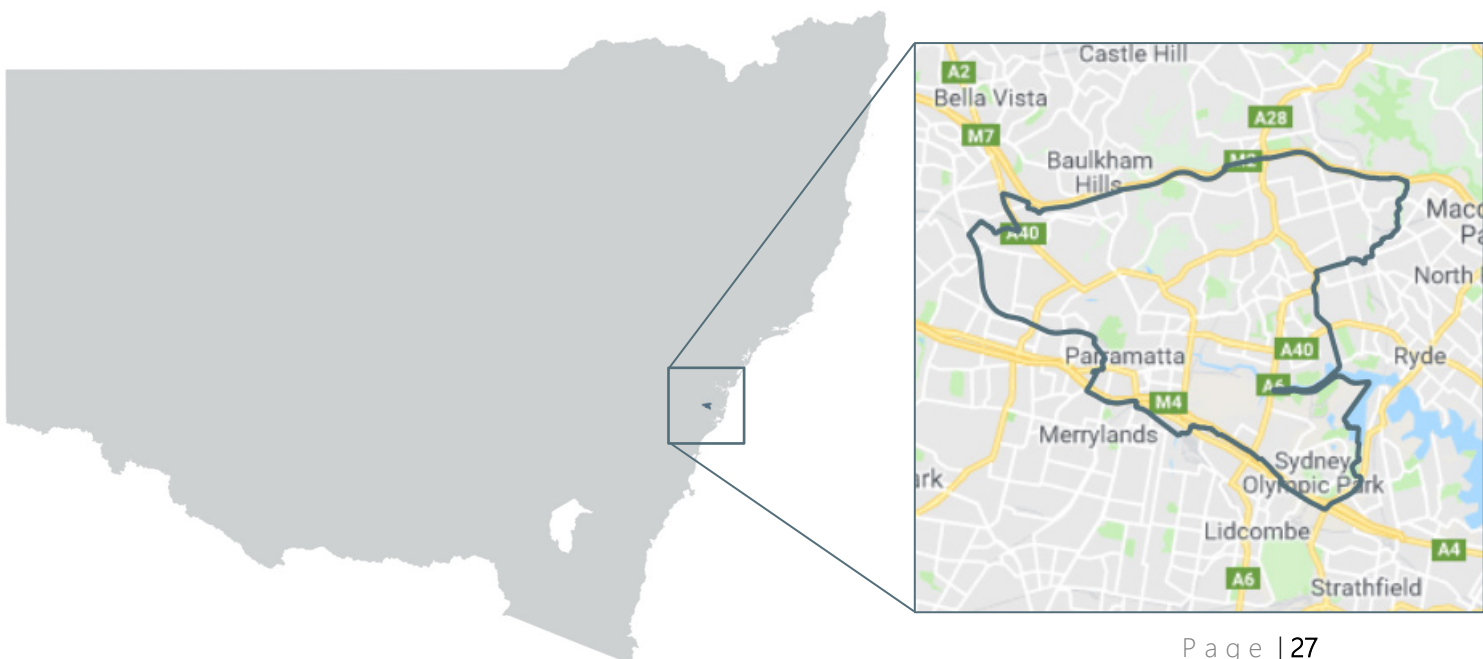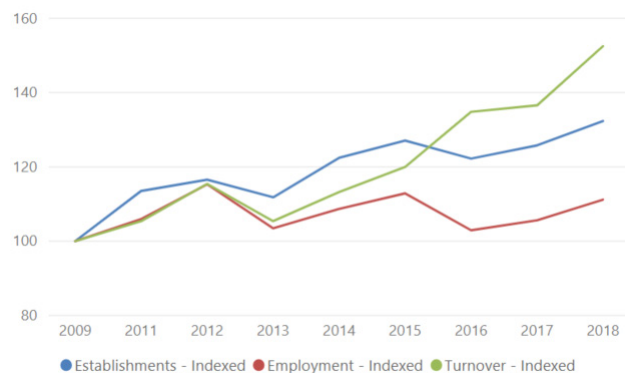
City of Parramatta

Parramatta has a particularly strong Food sub-sector in terms of establishments, making up 77% of its Core NTE. This is much higher than New South Wales (61%) and Australia (63%). Employment (67%) and turnover (48%) are lower in the Food sub-sector, however, suggesting Parramatta has a high proportion of smaller Food establishments.

Growth in Parramatta's Food sub-sector between 2017 and 2018 was driven by cafes and restaurants (+11% / +60 establishments), while the number of takeaway food services establishments fell slightly (-2% / -8).

Figure 20: Parramatta & NSW by sub-sector
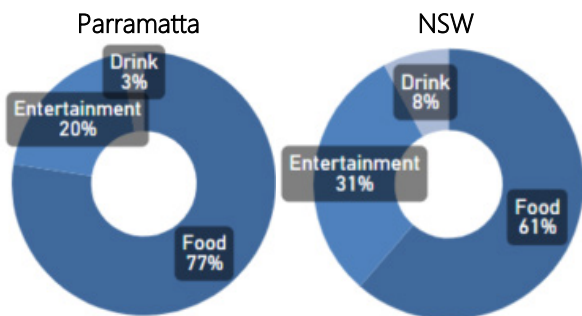
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	35 -23.9%	3%
Entertainment	244 +8.9%	20%
Food	953 +5.8%	77%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 16 in the appendix.

City of Sydney

| Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	4,936 +1.3%	10.4%
Employment	35,610 +0.1%	7.7%
Sales Turnover	$4,294m +5.8%	4.2%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Sydney has the most concentrated NTE in Australia, with almost 185 Core NTE establishments per km².

Sydney's Core NTE is a clear strength for the LGA as it represents over 10% of all of Sydney's establishments. In terms of establishments per km^2, it is ranked:

- first in Drink (22 per km^2),
- second in Entertainment (33 per km^2) and
- first in Food (130 per km^2).

Each of these sub-sectors experienced continued growth between 2017 and 2018, suggesting these positions are likely to be maintained in the future. Overall growth in turnover has occurred much faster than inflation (5.8% compared to 2.1%[10]).

Figure 21: Trend in Sydney's Core NTE

City of Sydney
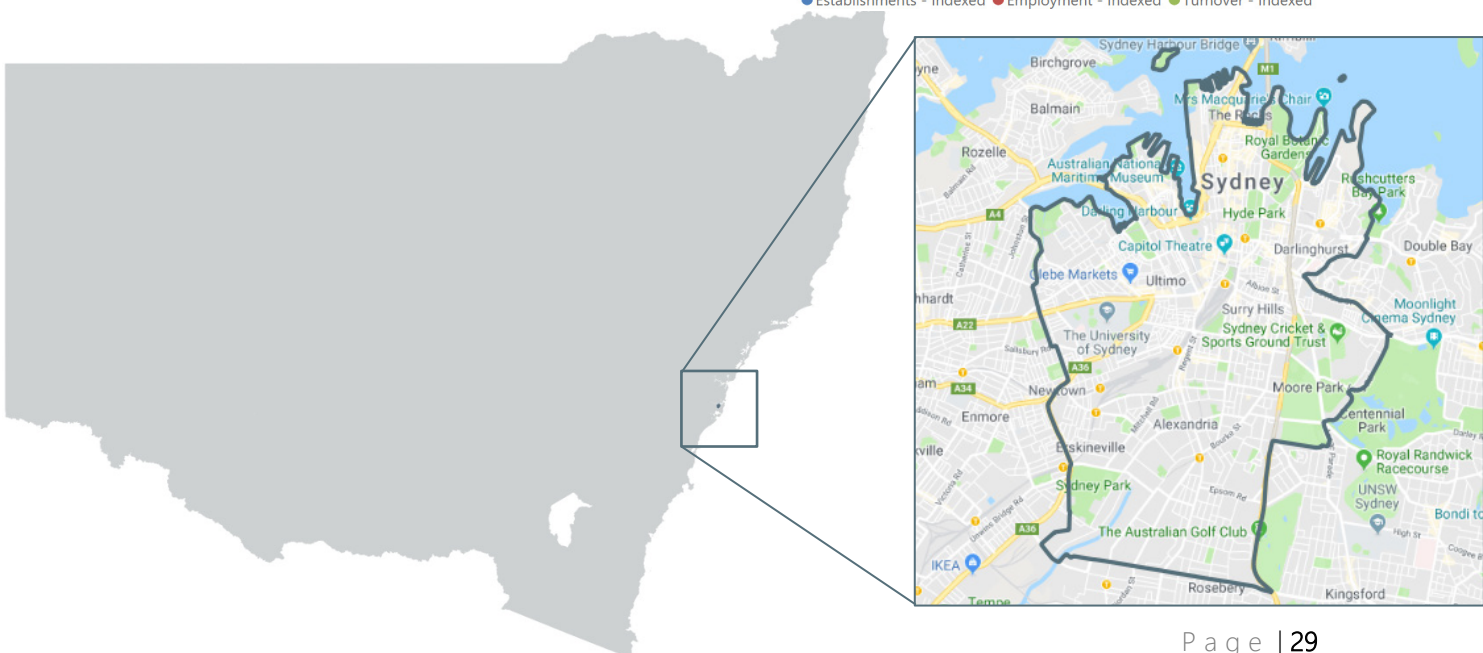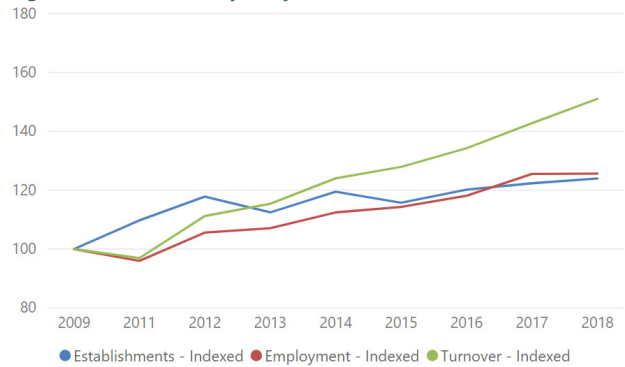
Food remains Sydney's strongest sub-sector, accounting for 70% of Core NTE establishments in 2018, well above New South Wales (61%).

Greatest actual growth in establishments was in Food (+1.0% / +35), while greatest percentage growth was in Drink (+3.7% / +21). Drink, however, had a minor increase in turnover (+1.1% / +7.1m) and employment declined (-3.8% / -210).

Entertainment grew at a slower rate than that of New South Wales in employment (+3.2% vs. +4.5%) and establishments (+0.9% vs. +3.4%). Entertainment turnover, however, grew considerably (+10.5% compared to +7.2 %).

Figure 22: Change in Sydney's Entertainment vs NSW

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	595 +3.7%	12%
Entertainment	878 +0.9%	18%
Food	3,463 +1.0%	70%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 17 in the appendix.

The NTE in Northern Territory

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	727 -3.6%	5.0%
Employment	18,725 +0.1%	13.3%
Sales Turnover	$2,244m +3.3%	6.6%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S1

Following strong growth from 2016 to 2017, the Core NTE in Northern Territory experienced losses in 2018 across establishments in all sub-sectors.

The wider economy along with the Non-Core and Supply sectors in Northern Territory have all experienced establishment growth since 2017 (+0.6%, +4.0% and +2.4% respectively), while the Core NTE has contracted over the same period (-3.6%).

As a result, the prevalence of the Core NTE within the Northern Territory looks to be declining; representing 5.0% of all establishments (compared to 4.7% nationally). While the proportion of the total economy that is Core NTE is declining it is still above average in terms of employment (13.1% compared to 8.8% nationally) and turnover (6.6% vs 3.8%).

Figure 23: Sub-sector NTE growth 2017-2018 in NT
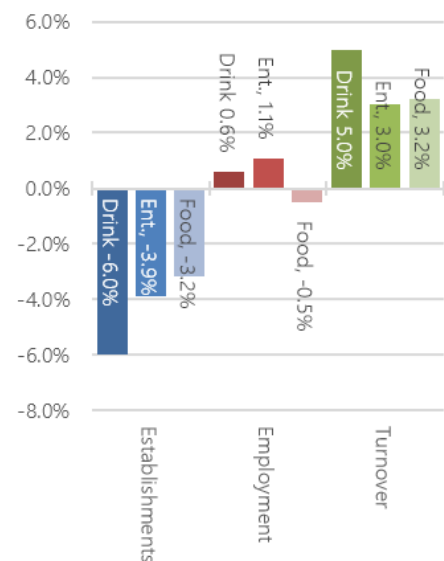
As highlighted in Figure 23, the contraction in the Core NTE is across all sub-sectors, with Entertainment (-3.9% / -9 establishments) and Food (-3.2% / -15) exhibiting the greatest absolute losses. The losses in Food establishments follow through to employment (-0.5% / -50 employees) although turnover has fared better (+3.2% / +$31m) as demonstrated in (Figure 24). This is slightly higher than inflation (+2.1%) over the period.
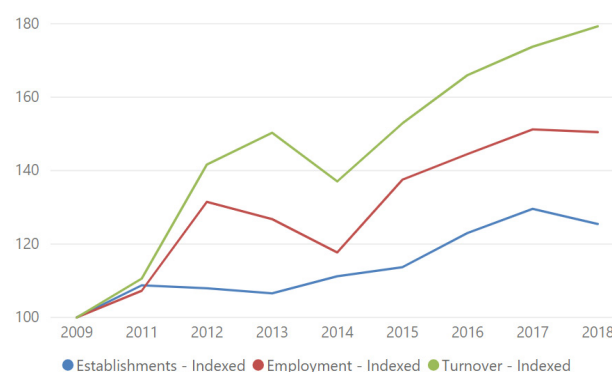
Losses in Entertainment establishments look to be driven by declines in gambling activities (-16% / -3 establishments) and creative and performing arts (-4% / -3 establishments).

While the Drink sub-sector has shown the greatest percentage decline (-6.0%) this accounts for only three establishments with employment largely unchanged (+0.6% / 15 employees). As such, this could recover over the course of the 2018-19 financial year.

In summary, following strong growth over the 2016 to 2017 period, the Core NTE in Northern Territory looks to have taken a step backwards in 2018. This is driven by large losses in the Entertainment and Food sub-sectors, which have seen their establishment numbers return back to 2016 levels.

As a result, the proportion of the total economy that the Core NTE represents has contracted to 5.0% (down from 5.2% in 2017) although this is still above the national average.

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	47 -6.0%	6%
Entertainment	222 -3.9%	31%
Food	458 -3.2%	63%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S3

For more information see Table 18 in the appendix.

City of Darwin

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	401 -2.0%	5.8%
Employment	5,420 -3.9%	11.2%
Sales Turnover	$661m +5.4%	4.5%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Darwin's Core NTE represents nearly 6% of all establishments in the LGA, which is above the territory and national average.

The structure of Darwin's Core NTE is slightly different to that of NT and Australia, with less reliance on Drink establishments (4% of Core NTE) and more emphasis on Food (66%).

Declines across all measures (establishments, employment and turnover) were experienced in Darwin in both the Food and Drink sub-sectors. Entertainment, however, grew across all three measures.

Figure 25: Darwin's Core NTE vs the Northern Territory
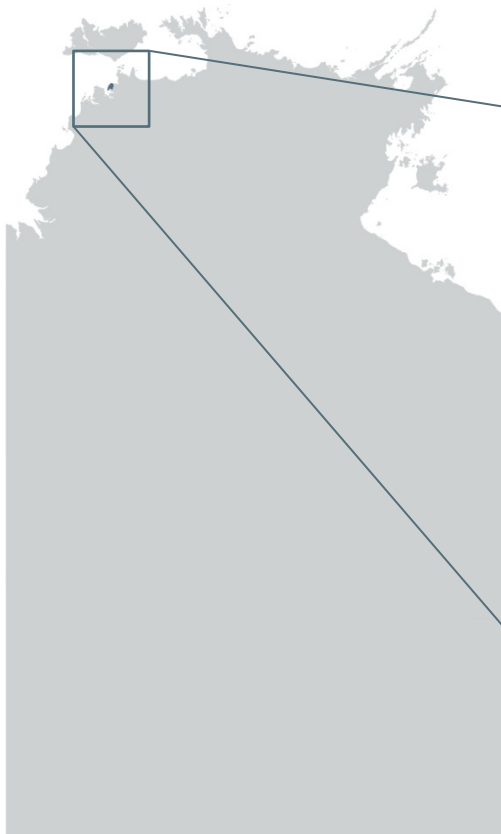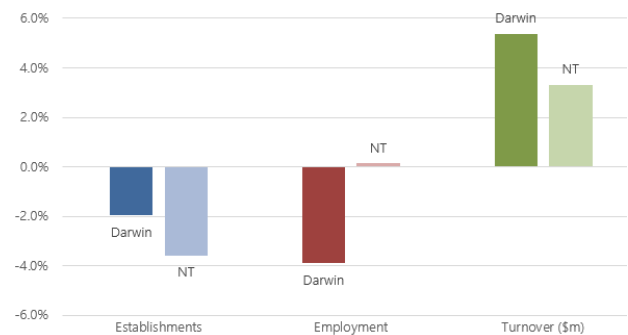
City of Darwin

Decline in Darwin's Food sub-sector was driven by Takeaway Food Services, which experienced a fall in establishments (-13/-9%), employment (-255/-19%) and turnover (-19.7m/-15%).

Figure 26: Trend in Darwin's Food sub-sector
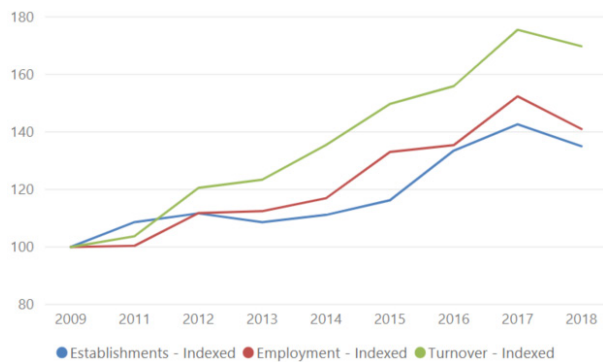
The growth observed in the Entertainment sub-sector was driven by the following activities, which grew across all economic measures:

- creative and performing arts
- horse and dog racing
- gambling

Sports and recreational activities also experienced growth in establishments and turnover but employment declined.

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	15 -16.7%	4%
Entertainment	120 +9.1%	30%
Food	266 -5.3%	66%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 19 in the appendix.

The NTE in Queensland

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	19,526 +2.1%	4.4%
Employment	224,910 +1.5%	9.0%
Sales Turnover	$26,460m +4.7%	3.9%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S1

The Core NTE in Queensland grew at a faster pace than that of VIC and NSW between 2016 and 2017 but this has slowed over the 2017 to 2018 period to below the national average.

While growth has slowed, Queensland's Core NTE has increased to over 19,500 establishments, with nearly 225,000 employees, generating over $26bn in turnover.

Establishment growth between 2017 and 2018 was +2.1% (compared to +2.5% nationally), with employment increasing by +1.5% (+2.1% nationally) and turnover increasing by 4.7% (+5.6% nationally). Inflation was (+2.1%).

Figure 27: Trend in Queensland's Core NTE
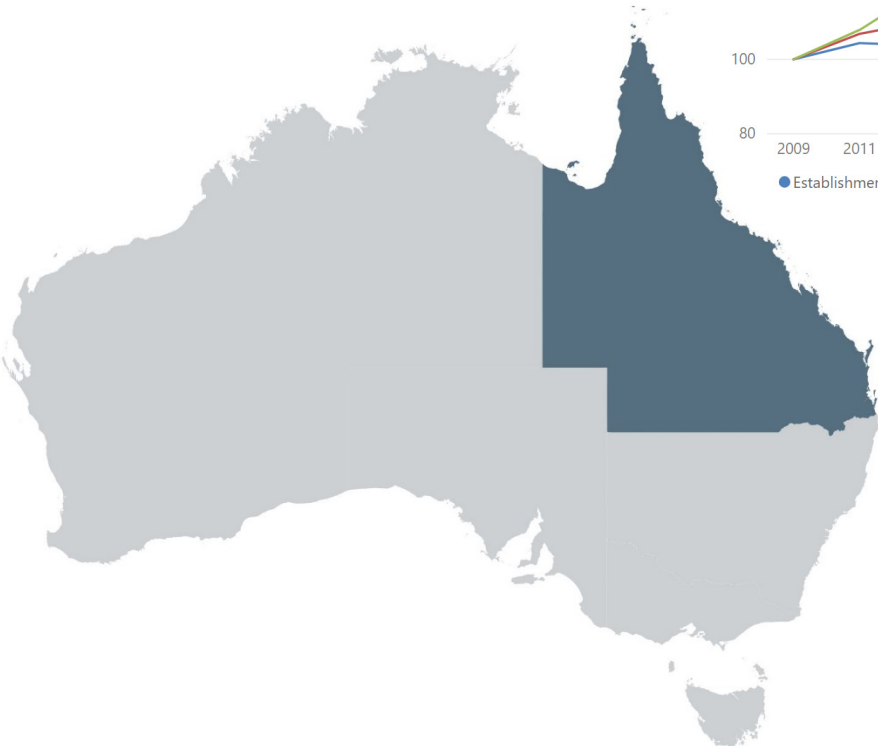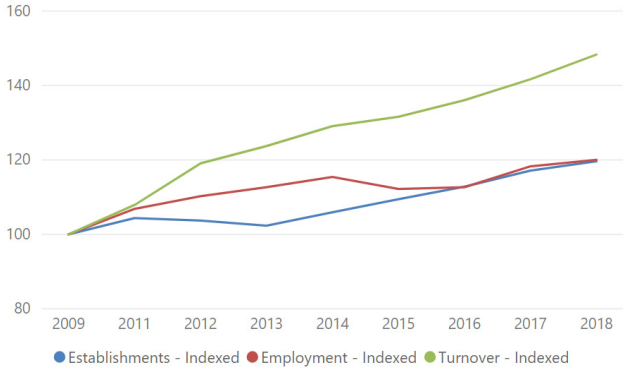
The mix of activities in the Core NTE has shifted slightly between 2017 and 2018, with the Food sub-sector becoming slightly less prevalent (64% of establishments compared to 65% in 2017) and Entertainment increasing (to 30% compared to 29% in 2017).

This is driven by growth over the last year in the Entertainment sub-sector (+2.7% establishments) at a quicker rate than that of Food (+1.9%) or Drink (+1.7%) and mirrors the performance of Entertainment nationally.

This performance has followed through to employment (+2.4%), which has outperformed Queensland's Core NTE (+1.5%), and turnover (+4.5%), matching the Core NTE (+4.7%).

Key drivers of growth in the Queensland Entertainment sector are large increases in creative and performing arts establishments (+4% / +81), sports and physical recreation establishments (+3% / +62) and amusement and other recreation establishments (+6% / +28).

In summary, while Queensland's Core NTE is the third largest in Australia and was previously growing at a rate faster than that of Victoria and New South Wales between 2016 and 2017, this looks to have slowed in 2018 – mirroring the national trend. Food was key in 2017 and still maintains a large share of the Core NTE but Entertainment is on the rise, suggesting this is becoming more important and is helping the sector increase as a whole.

Figure 28: Growth in QLD's Entertainment 2017-18
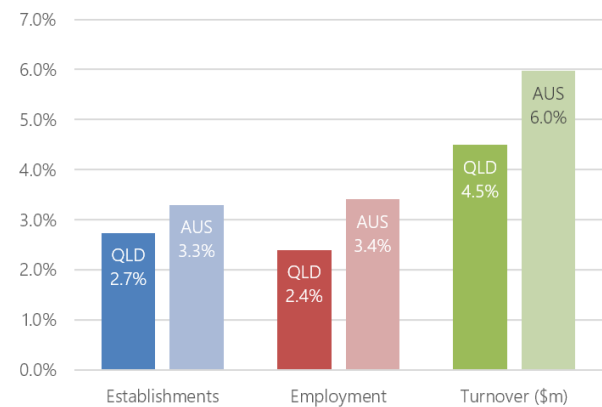
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	1,163 +1.7%	6%
Entertainment	5,782 +2.7%	30%
Food	12,581 +1.9%	64%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S3

For more information see Table 20 in the appendix.

Brisbane City Council

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	6,378 +2.9%	5.0%
Employment	68,750 -1.4%	10.7%
Sales Turnover	$8,140m +6.4%	4.3%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

In 2018, Brisbane maintains its position as the largest Core NTE in Australia along with the largest Food and Entertainment sub-sectors.

It should be noted that Brisbane naturally ranks highly in all three NTE sub-sectors, due to its large geographical size, which makes comparisons to other LGAs difficult and is reflected in much lower overall concentrations per km^2 than that of other LGA areas.

Brisbane's Core NTE establishments and turnover have grown over the last year at a faster pace than Queensland's Core NTE, particularly in Drink and Entertainment.

Figure 29: Change in Brisbane's Core NTE 2017-18
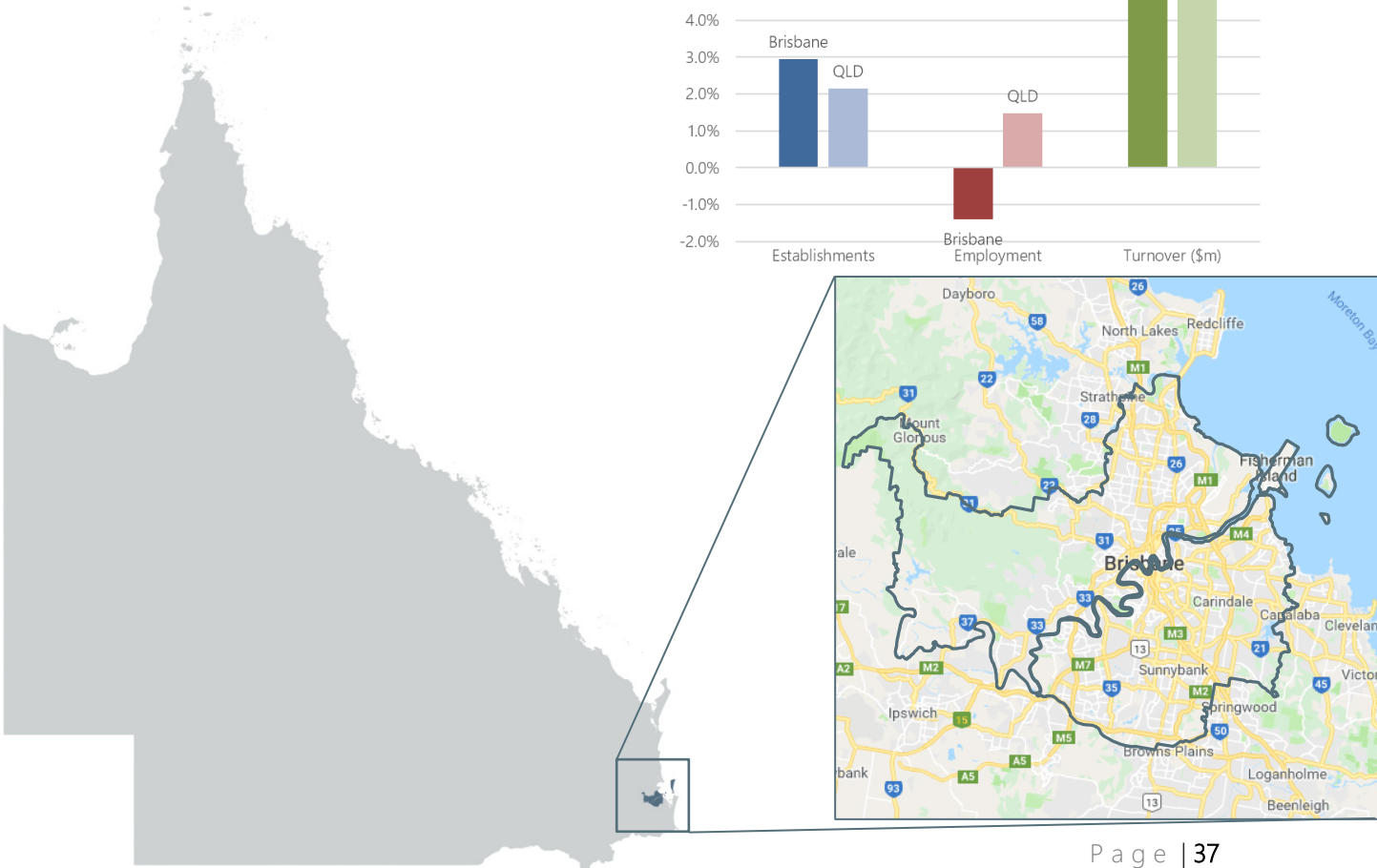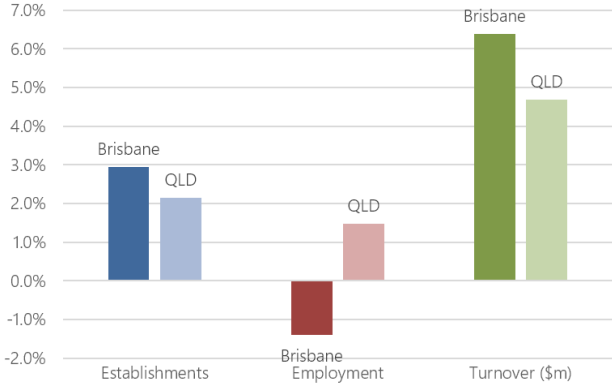
Brisbane City

Employment seems to have slowed in the last year, mainly due to losses in the Food sub-sector (-2.3%), which ends an almost 10 year run of continuous growth. This has a large impact as it represents 67% of Core NTE employment.

Figure 30: Trend in Brisbane's Food sub-sector
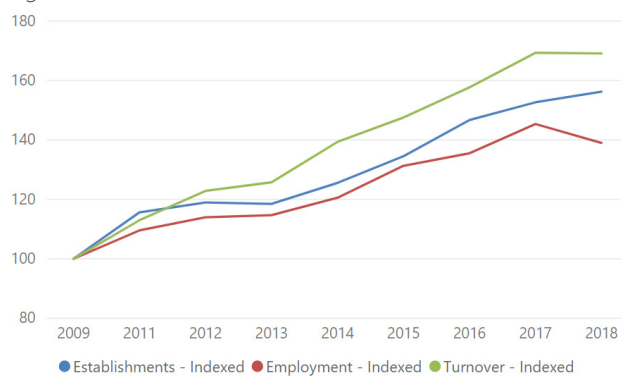
Entertainment is the only sub-sector to have increased in establishments (+4.0%), employment (+1.0%) and turnover (+14.2%) since 2017, growing its Core NTE establishment share to 27%. Drink has grown well (+5.7% establishments), but this has yet to translate to employment (-1.1%) suggesting an influx of newer smaller firms.

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	297 +5.7%	5%
Entertainment	1,738 +4.0%	27%
Food	4,343 +2.3%	68%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 21 in the appendix.

City of Gold Coast

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	3,381 +5.1%	5.0%
Employment	35,550 +3.0%	11.4%
Sales Turnover	$4,303m +11.8%	4.6%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Strong growth across all Core NTE sub-sectors in Gold Coast helps maintain its position as the third largest Core NTE in Australia.

It is important to note that the large physical size of the Gold Coast LGA means it ranks highly, particularly in Food (third) Entertainment (second) and Drink (fifth), but like Brisbane, lower in terms of density.

The Core NTE has continued to grow at faster rate than wider Queensland across all key metrics as shown below.

Figure 31: Change in Gold Coast's Core NTE 2017-18
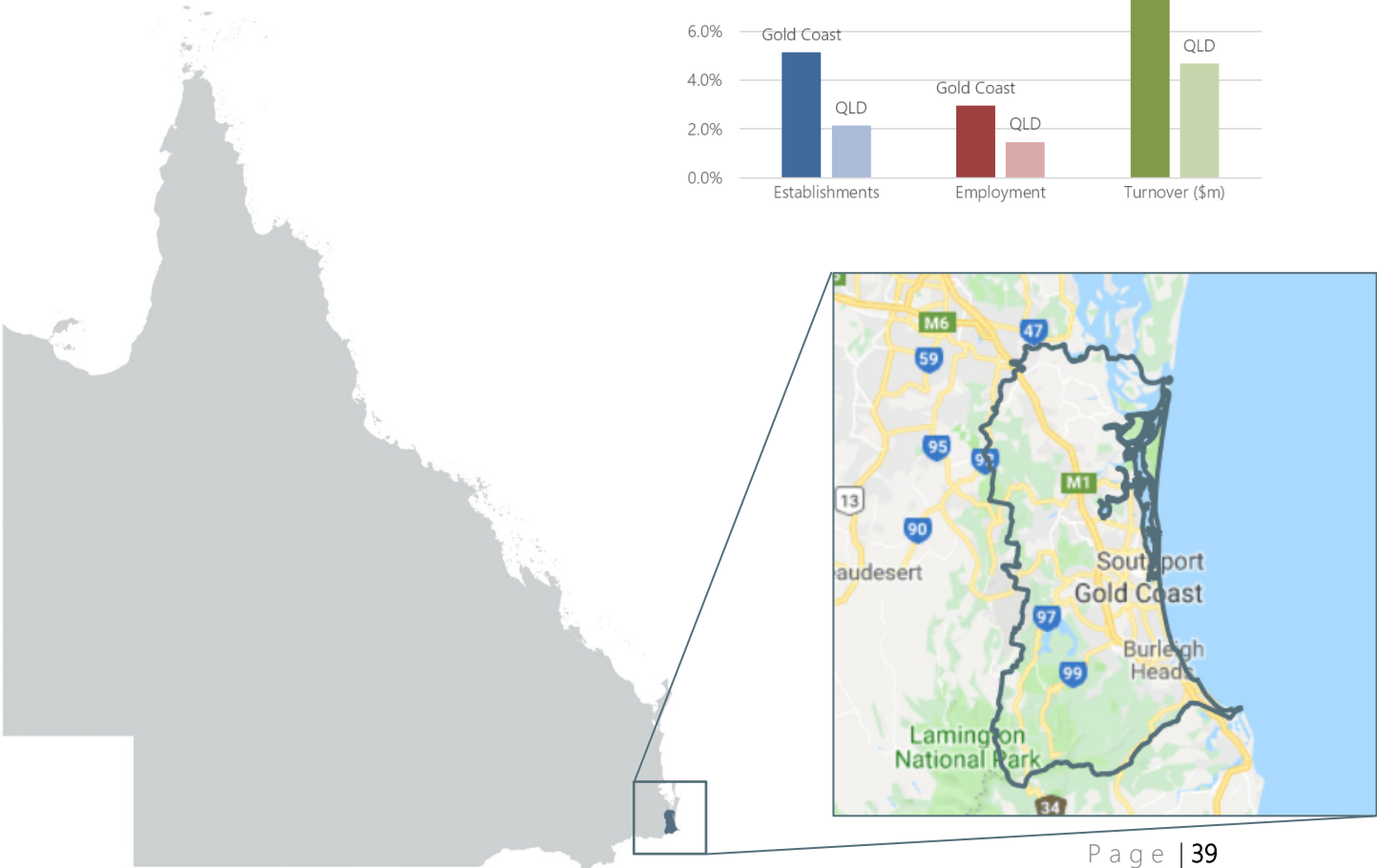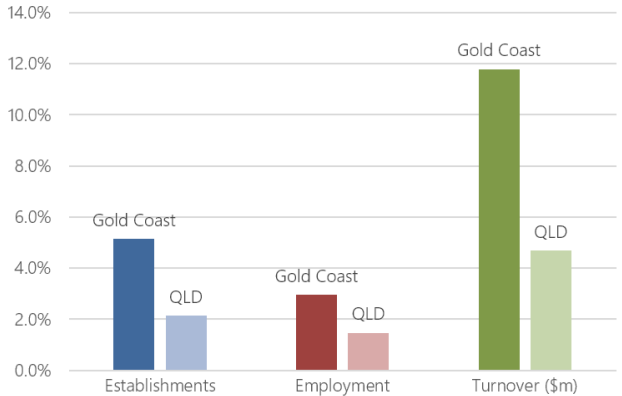
City of Gold Coast

Establishment growth has occurred across all three sub-sectors (see right), with Drink and Entertainment making the greatest contributions to employment (+11.5% and +8.8% respectively) and turnover (+17.0% and +22.4%).

Figure 32: Change in Gold Coasts sub-sectors 2017-18
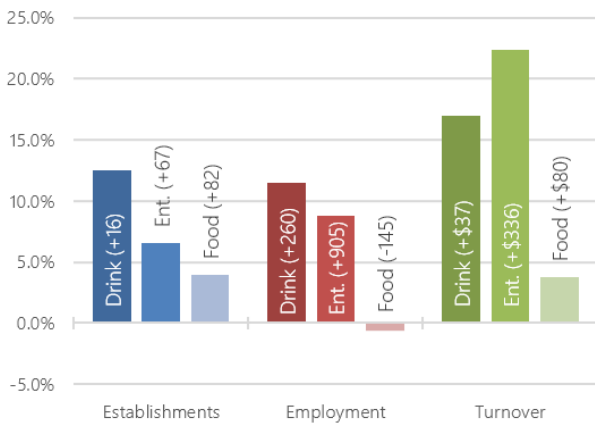
This strong growth in Entertainment and Drink driven by creative and performing arts and pubs, taverns and bars (respectively) suggest that these activities may becoming more important in Gold Coast, although Food is still a large contributor.

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	144 +12.5%	4%
Entertainment	1,088 +6.6%	32%
Food	2,149 +4.0%	64%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 22 in the appendix.

The NTE in South Australia

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	6,479 +0.6%	4.3%
Employment	78,395 +2.1%	9.2%
Sales Turnover	$9,014m +4.9%	4.0%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S1

The South Australian Core NTE has shown strong employment and turnover growth over the 2017 to 2018 period.

The Core NTE has increased its employment base to almost 78,400 people (+2.1%) since 2017, which matches the national growth rate average. The number of Core NTE establishments has modestly increased (+0.6%) to 6,479 indicating that the growth is likely to be from existing establishments rather than new establishments.

While the employment growth is positive, the growth in establishments continues a relatively slow and steady trend, present since around 2013, as demonstrated below.

Figure 33: Trend in South Australia's Core NTE
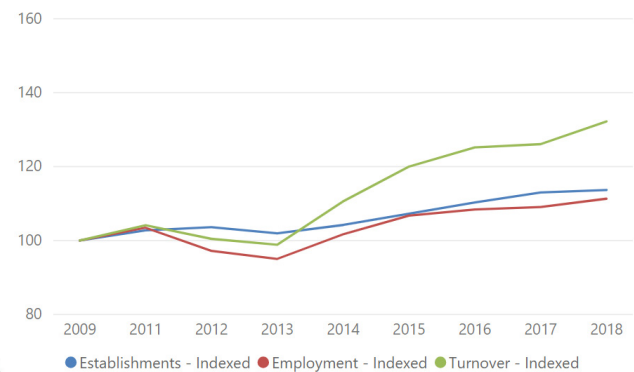
The Drink sub-sector in South Australia continues to represent an above average concentration of Core NTE activities in 2018 (12% compared to 8% nationally). The sub-sector has experienced a slight decline (-0.5%) in its establishment base since 2017 although this hasn't flowed through to employment (+0.5%) or turnover (+2.6%) both of which have increased over the period.

Entertainment represents a lower proportion of establishments in South Australia's Core NTE (26%) compared to Australia (29%), but it is increasing (+0.3%) particularly in employment (+4.0%) and turnover (+4.7%).

In terms of growth rates Entertainment is the strongest performing sub-sector in South Australia's Core NTE, however it is Food that has experienced the largest absolute growth in establishments (+0.9% / +37), employment (+1.9% / +935) and turnover (+5.7% / +$275m). This is entirely driven by strong growth in cafes and restaurants (+45 establishments since 2017).

In summary, South Australia's Core NTE has continued to grow over the 2017 to 2018 period, matching the national trend. Its mix of activities remains more focused on Drink led establishments, although this has remained relatively static in the last year. The key drivers of change between 2017 and 2018 have been Entertainment and Food, suggesting that, like other areas, Entertainment could become more important in future years.

Figure 34: SA's Core NTE establishments by sub-sector
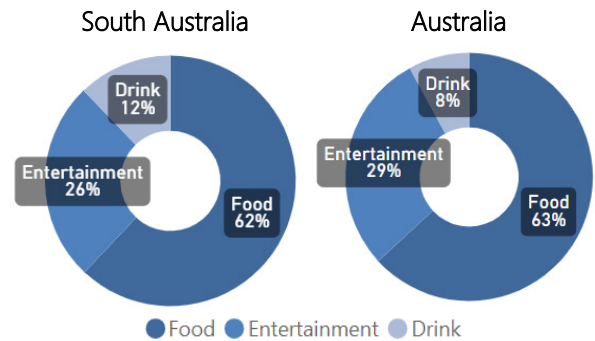
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	788 -0.5%	12%
Entertainment	1,676 +0.3%	26%
Food	4,015 +0.9%	62%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S3

For more information see Table 23 in the appendix.

City of Adelaide

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	833 +3.1%	5.4%
Employment	11,290 -0.7%	13.0%
Sales Turnover	$1,247m +5.1%	5.1%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Adelaide's mix of Core NTE activities looks to be moving towards a greater Food focus, with the fourth highest concentration (per km^2) in Australia.

Historically Adelaide's Core NTE has a much higher concentration of Drink establishments than that of South Australia or Australia as a whole. This is still the case in 2018, with Drink accounting for 17% of Core NTE establishments and increasing since 2017 (+4.5%). However, employment in the sub-sector is down (-7.4%) as is turnover (-3.1%) suggesting the sub-sector may be slowing or that establishments are smaller in size.

Figure 35: Adelaide's Drink sub-sector change 2017-18
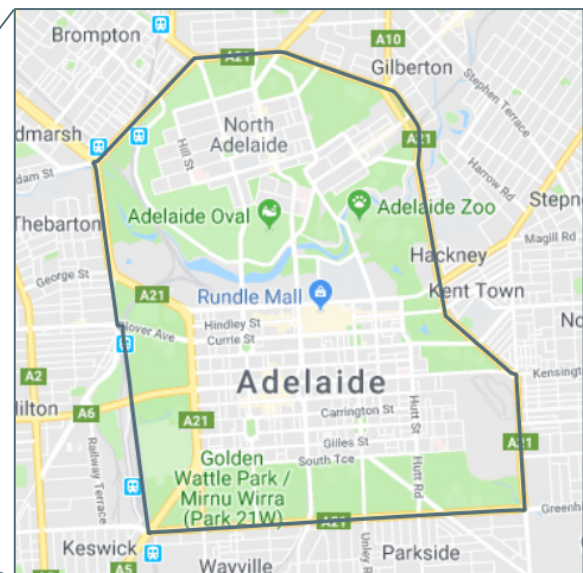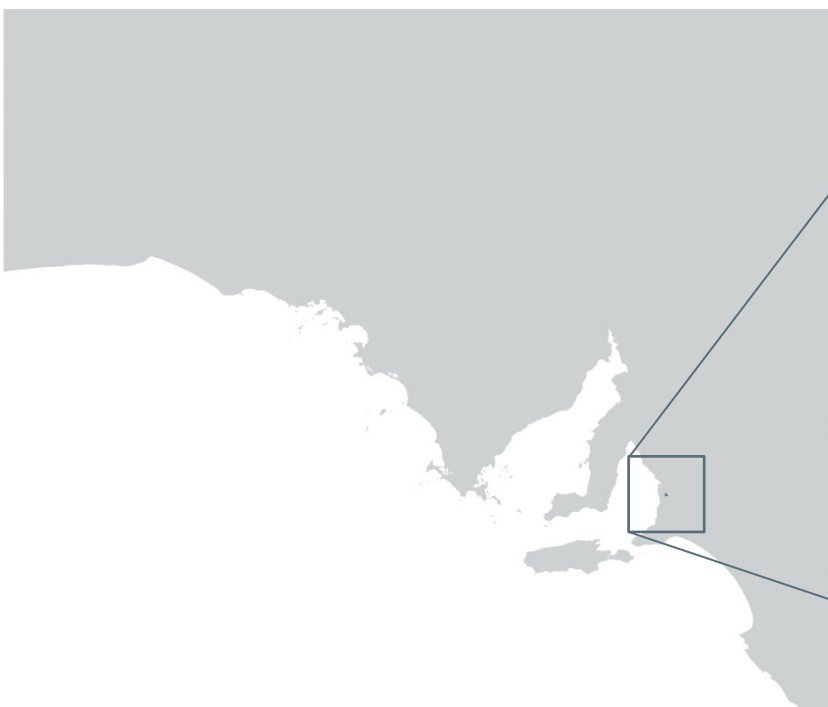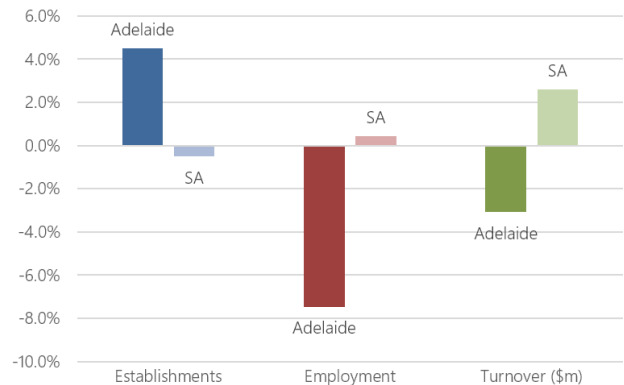
City of Adelaide

This decline could impact on Adelaide's live music scene, with a high number of gigs occurring in Drink establishments[11].

Food, on the other hand, has seen increases in establishments (+3.8%), employment (+1.5%) and turnover (+6.0%) since 2017, while Entertainment has remained relatively static over the period (-1.7% establishments and -0.9% employment).

Figure 36: Trend in Adelaide's Food sub-sector
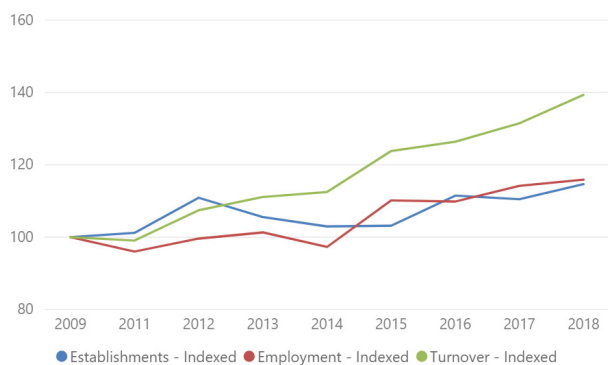
As a result, Adelaide appears to be shifting focus towards a more Food based NTE.

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	139 +4.5%	17%
Entertainment	115 -1.7%	14%
Food	579 +3.8%	70%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 24 in the appendix.

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[11] Music SA, (2017), Adelaide Live Music Census 2017 (recorded in May)
http://www.musicsa.com.au/wp-content/uploads/2017/12/LMO-Adelaide-Live-Music-Census-2017_v2.pdf

The NTE in Tasmania

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	2,049 +4.5%	5.3%
Employment	23,565 +1.0%	9.4%
Sales Turnover	$2,795m +5.7%	4.3%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S1

The Tasmanian Core NTE has increased its establishment base at the fastest rate of all the states and territories, continuing its trend of performing well above the national growth average.

The number of establishments in Tasmania's Core NTE increased by 4.5% since 2017 – almost double the rate observed nationally (+2.5%) – increasing the total number of establishments to almost 2,050. Both employment (+1.0%) and turnover (+5.7%) also increased over this period, with employment growing at a slower rate than observed nationally, suggesting an influx of new smaller establishments.

Figure 37: Change in Tasmania's Core NTE 2017-18
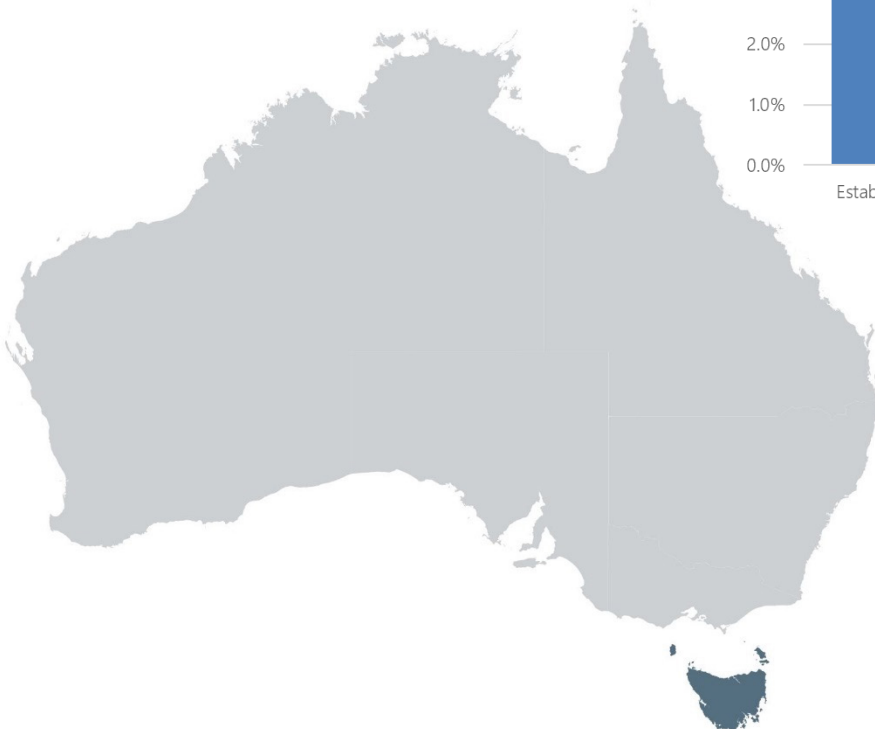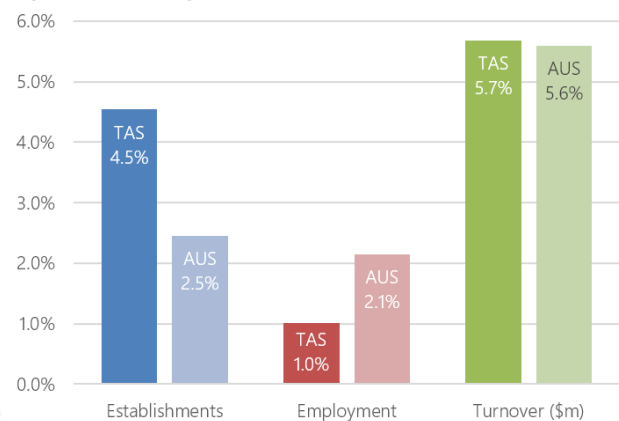
Establishment growth rates over the last year have been driven by strong increases in both Entertainment (+6.5%) and Food (+4.9%). This strong growth has flowed through to employment (+1.4% Entertainment / +2.9% Food) and turnover (+6.2% / +6.7%). The key activities driving growth are cafes and restaurants for Food and creative and performing arts for Entertainment.

While growth has been positive for Entertainment and Food, the Drink sub-sector has experienced a slight decline in establishments (-1.7%). This is associated with a loss in Drink related employment (-6.9% / -250 employees) returning this sub-sector back to levels last witnessed in 2016. The level of turnover has managed to remain steady (+1.4%), although applying inflation at +2.1% produces a small decline in real terms.

In summary, Tasmania's Core NTE continues to grow its establishment base at a rate above the national average. Growth in employment and turnover has slowed slightly compared to previous years but is still increasing. The Entertainment and Food sub-sectors have driven establishment growth in the Core NTE, highlighting the strength of these activities in Tasmania. By comparison the Drink sub-sector looks to have declined slightly following robust performance over the 2016 to 2017 period.

Figure 38: Trend in Tasmania's Food sub-sector
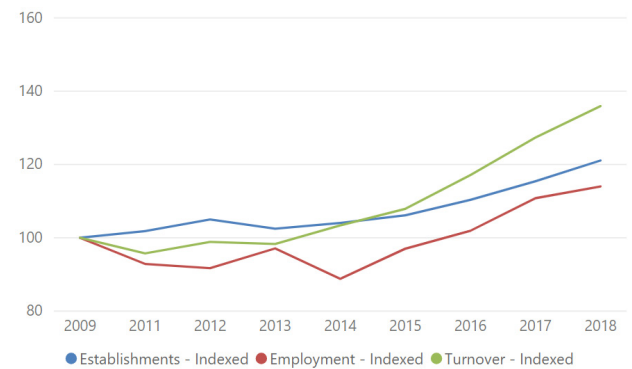
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	230 -1.7%	11%
Entertainment	556 +6.5%	27%
Food	1,263 +4.9%	62%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S3

For more information see Table 25 in the appendix.

City of Hobart

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	502 +7.0%	7.9%
Employment	6,625 +0.8%	13.7%
Sales Turnover	$757m +6.9%	5.4%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

The Hobart Core NTE continues to represent an above average proportion of the wider economy, with increases in establishments and turnover.

The Core NTE in Hobart accounts for almost 14% of Hobart's employment (9% in Tasmania) demonstrating the importance of the sector to the local economy. The sector continued to grow over the 2017 to 2018 across establishments (+7.0%), employment (+0.8%) and turnover (+6.9%), and at a quicker pace than that of wider Tasmania (except in employment where performance was similar).

Figure 39: Change in Hobart's Core NTE 2017-18
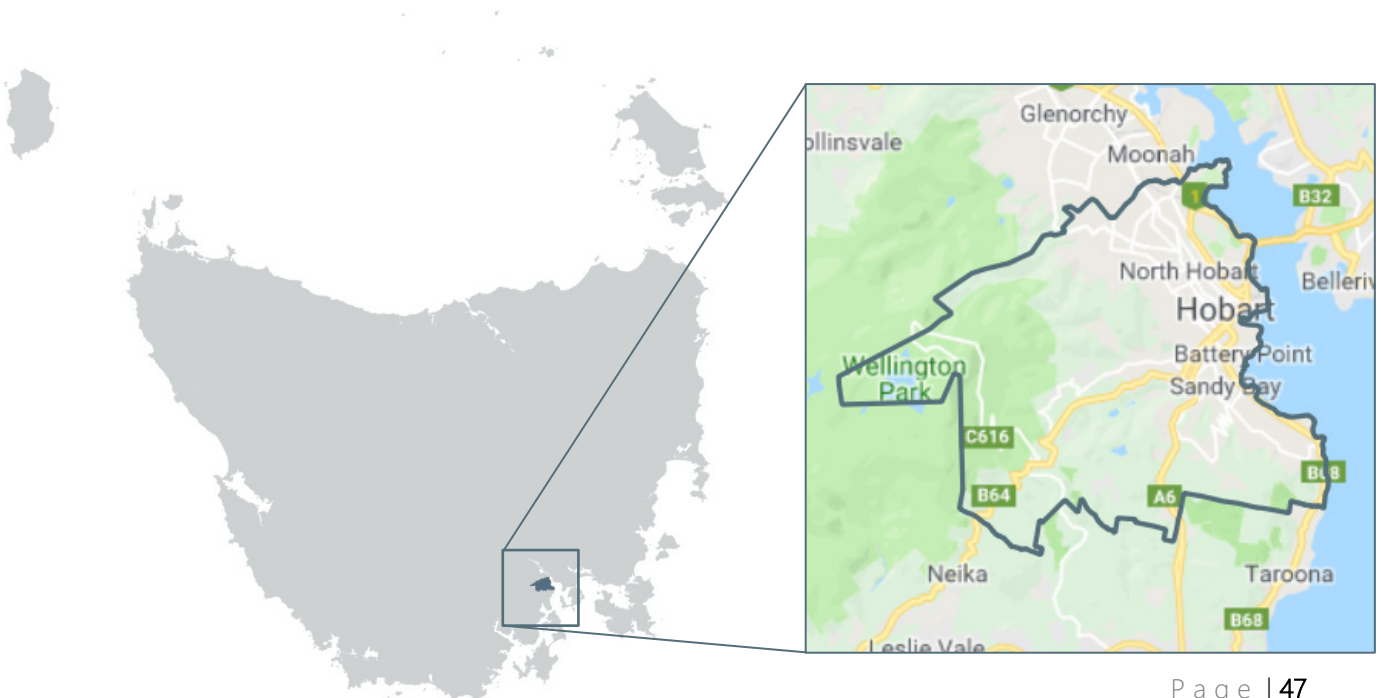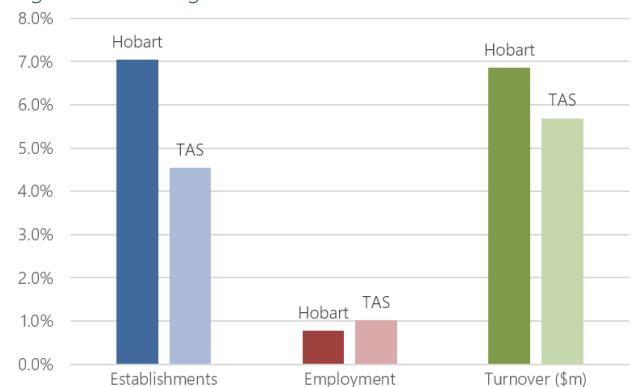
Elizabeth Street Pier, Hobart

Growth has been driven by strong increases in Food establishments (+11.4% / +35), employment (+3.9% / +165) and turnover (+8.6% / +$35m). This looks to be a continuation of the 2016 to 2017 trend, with Hobart's Core NTE shifting towards greater Food focus. Especially when considering that Drink establishments have declined (-11.5%) and Entertainment has remained relatively static (+5.0%) over the same period.

As a result, Food establishments now represents 68% of the Core NTE (up from 65%), while Entertainment and Drink account for 21% and 11% respectively (down from 22% and 13% in 2017).

Figure 40: Trend in Hobart's Food sub-sector
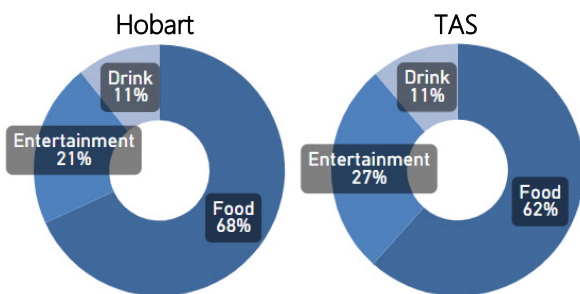
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	54 -11.5%	11%
Entertainment	106 +5.0%	21%
Food	342 +11.4%	68%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 26 in the appendix.

The NTE in Victoria

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	30,844 +3.3%	5.0%
Employment	279,920 +3.4%	8.5%
Sales Turnover	$34,928m +6.9%	3.8%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S1

Victoria has experienced growth well above the national average over the 2017 to 2018 period, continuing its strong performance over the last few years.

Between 2017 and 2018, Victoria's Core NTE closely matched its growth between 2016 and 2017. Compared to Australia, Victoria was also ahead across establishments (+3.3% compared to +2.5% nationally), employment (+3.4% compared to +2.1%) and turnover (+6.9% compared to +5.6%).

Figure 41: Change in Victoria's Core NTE 2017-18
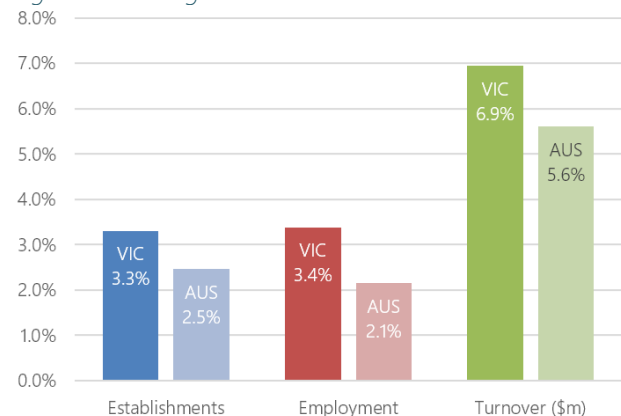
The Core NTE growth in Victoria has surpassed that of neighbouring New South Wales – closing the gap between the first and second largest Core NTEs in Australia.

Currently, Victoria accounts for 28% of Australia's Core NTE establishments, 25% of employment and 26% of turnover.

The distribution of activities within the Core NTE is broadly similar to that of Australia and is largely unchanged since 2017, with Food being the predominant activity (64% of Core NTE establishments) followed by Entertainment (28%) and Drink (8%).

Like other states and territories, the key drivers of establishment growth in Victoria's Core NTE are Entertainment (+4.9%) and Food (+2.9%). Both have grown quicker than the national average (+3.3% and +2.3% respectively)

Entertainment growth is due to a large increase in creative and performing arts (+5% / +214) and sport and physical recreation establishment (+7% / +134). Food has seen a large number of new café and restaurants since 2017 (+4% / +451).

While Drink is the smallest sub-sector, its growth is more modest compared to rest of the sector (+1.4% establishments) although it has doubled the national average (+0.7%).

In summary, Victoria has continued its strong run of Core NTE growth between 2017 and 2018 driven predominantly by increases in Food and Entertainment. Like other states and territories Entertainment has seen particularly strong growth in the last year suggesting a potential shift in activities. The strong growth in Victoria is above the national average and neighbouring New South Wales, which is helping close the gap between the two states.

Figure 42: Sub-sector NTE growth 2017-2018 in VIC
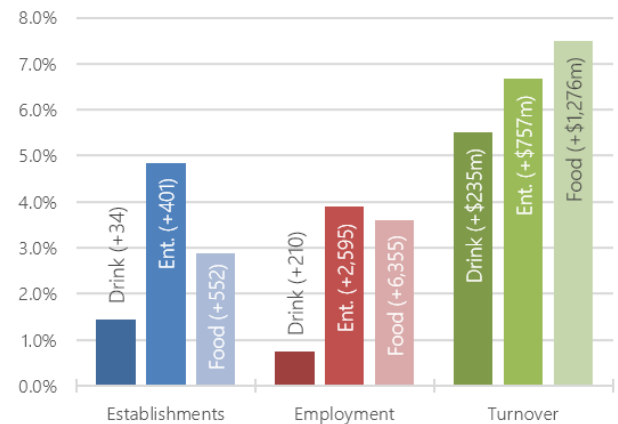
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	2,405 +1.4%	8%
Entertainment	8,663 +4.9%	28%
Food	19,776 +2.9%	64%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S3

For more information see Table 27 in the appendix.

City of Melbourne

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	2,510 +4.4%	6.2%
Employment	31,130 +2.5%	10.6%
Sales Turnover	$3,529m +9.6%	4.2%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Melbourne's Core NTE establishments and turnover continues to grow at a faster rate than wider Victoria, driven by strong Food and Entertainment growth.

Figure 43: Change in Melbourne's Core NTE 2017-18

Melbourne's Core NTE continued to grow between 2017 and 2018 in terms of establishments (+4.4%), employment (+2.5%) and turnover (+9.6%).

The key driver of this performance is the Entertainment sub-sector, which has seen the number of establishments increase by +6.2% (+29), which in turn has contributed to strong employment (+5.7% / +310) and turnover (+19.5% / +$158m) growth since 2017.

City of Melbourne

Figure 44: Melbourne's establishments by sub-sector

Melbourne

Drink 10%
Entertainment 20%
Food 71%

VIC

Drink 8%
Entertainment 28%
Food 64%

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	243 -2.0%	10%
Entertainment	497 +6.2%	20%
Food	1,770 +4.8%	71%
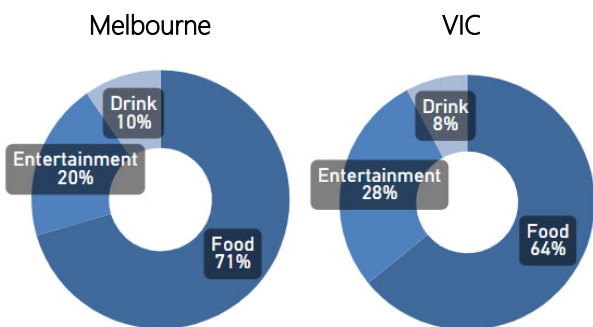
Food remains Melbourne's largest Core NTE sub-sector and has increased its establishment base in 2018 (+4.8% / +81), leading to a marginal increase in its share of the Core NTE (71%); above the state (64%) and national (63%) averages. While establishment growth in Food has been strong, employment (+1.8% / +400) and turnover (+6.4% / +$133m) have been more modest.

Although Food and Entertainment's market share increased, Drink establishments have remained relatively static over the period (-2.0% / -5), while Drink turnover increased (+6.0% / +$18.5m).

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 28 in the appendix.

Maroondah City Council

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	417 +14.9%	4.4%
Employment	3,065 +10.5%	5.8%
Sales Turnover	$369m +17.9%	2.5%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Growth in Maroondah's Core NTE is well above the state average and continues a strong trajectory established in 2015

Figure 45: Trend in Maroondah's Core NTE
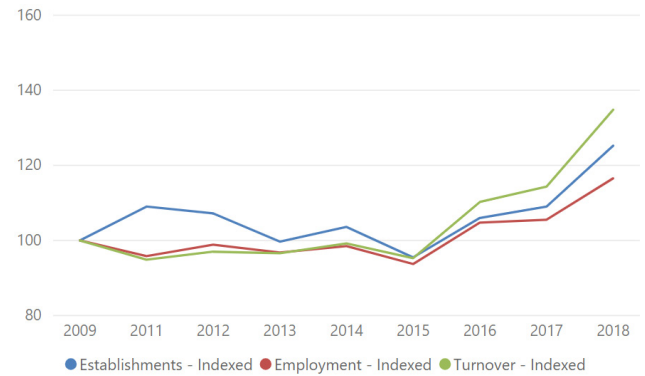
Core NTE Establishments (+14.9%), employment (+10.5%) and turnover (+17.9%) all experienced positive increases between 2017 and 2018. This was thanks to strong growth across all three sub-sectors within the Core NTE – particularly Food.

Food establishments increased since 2017 (+13.1% / +32), leading to growth in employment (+16.0% / +280) and turnover (+21.2% / +$36m). This is particularly positive given the decline Food experienced between 2016 and 2017 (-5.7% employment and -5.4% turnover).
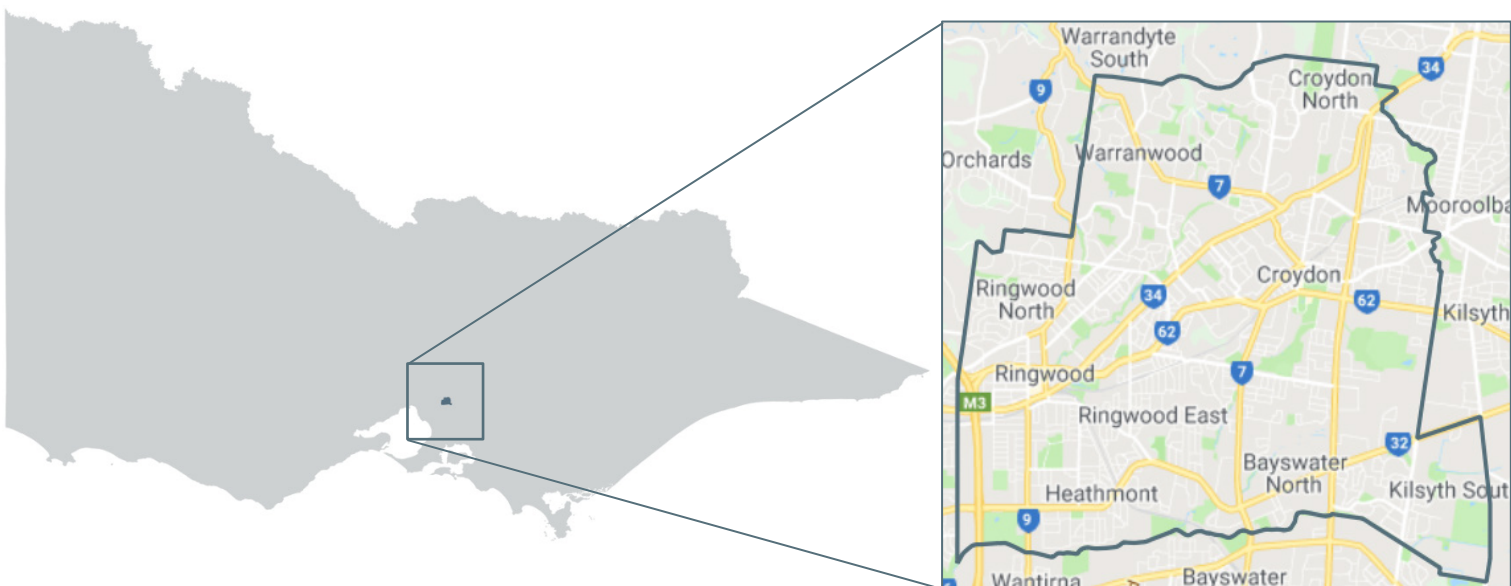
Eastland, Maroondah City Council

Growth in Food establishments has been driven entirely by the introduction of new cafes and restaurants (+20.1% / +31), while takeaways have remained static (+1.1% / +1), with observed declines in employment and turnover.

Entertainment continued its strong run of growth in to 2018, with establishments increasing (+18.4% / + 18) along with employment (+9.5% / +70) and turnover (+23.7% / +$27m), resulting in an increased share of Maroondah's Core NTE.

Figure 46: Trend in Maroondah's Entertainment
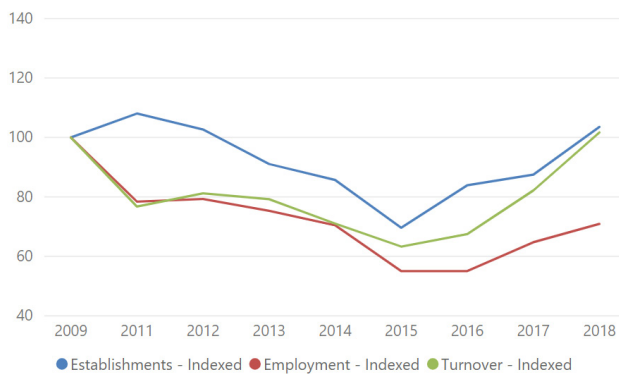
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	25 +19.0%	6%
Entertainment	116 +18.4%	28%
Food	276 +13.1%	66%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 29 in the appendix.

Port Phillip City Council

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	1,250 -1.9%	5.9%
Employment	12,710 -8.2%	11.2%
Sales Turnover	$1,588m -0.3%	5.1%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Performance in Port Phillip between 2017 and 2018 is at odds with wider Victoria, with declines in establishments, employment and turnover.

Figure 47: Change in Port Phillip's Core NTE 2017-18
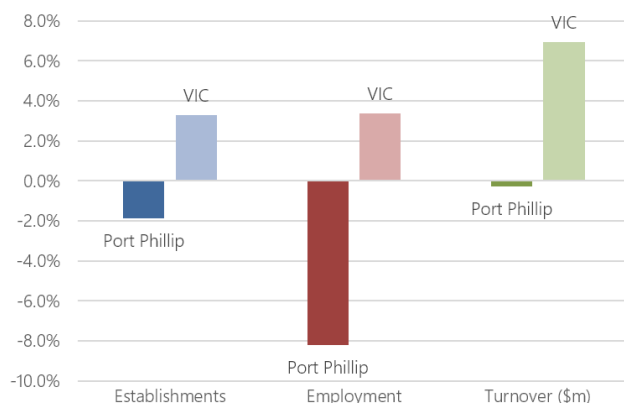
This has been driven primarily by large losses in Food establishments (-3.9% / -27), which have flowed through to employment (-9.2% / -740) and turnover (-5.1% / -$40m).

While Drink (+1.0%) and Entertainment (+0.4%) have managed to maintain their establishment base since 2017, both have witnessed large declines in employment (-5.0% / -7.6% resp.) – although turnover has increased (+3.2% / +4.6%).
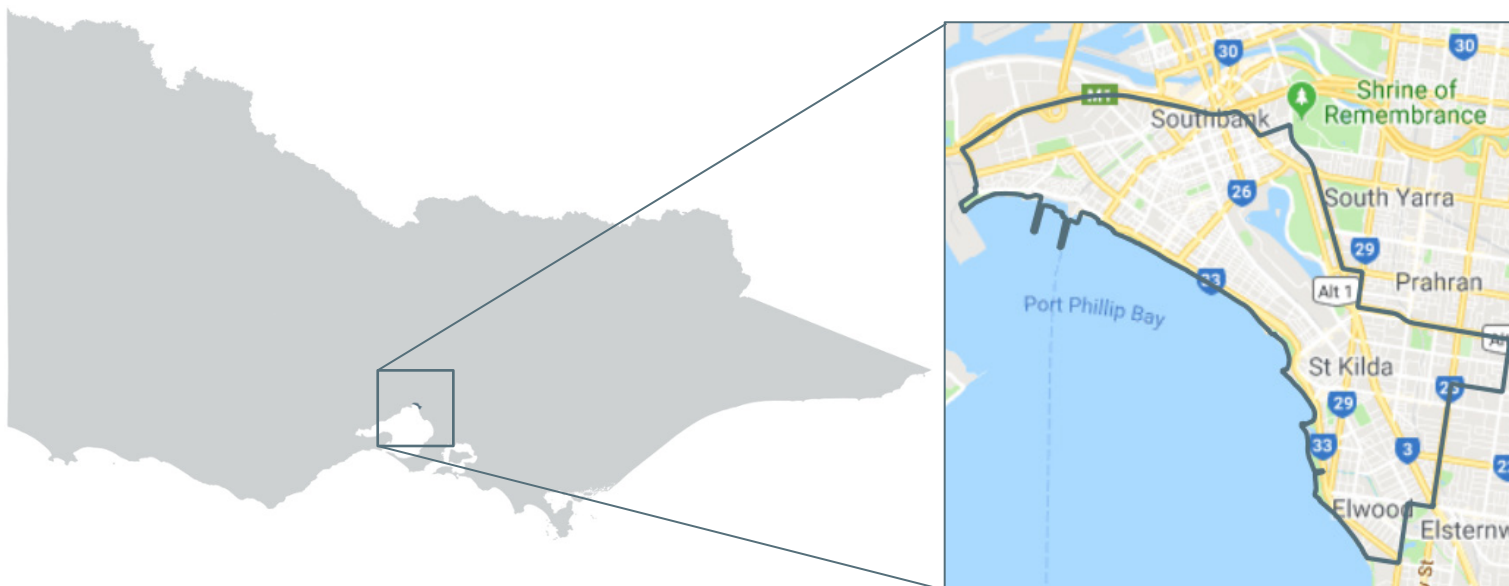
Luna Park, Port Phillip City Council

The decline in Food establishments has slightly shifted the distribution of Core NTE activities towards an even greater share of Entertainment activities (39%).

Figure 48: Port Phillip's establishments by sub-sector
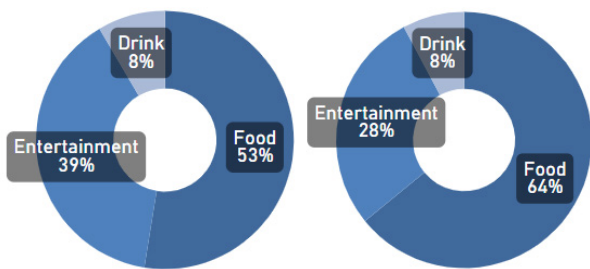
This could be a temporary shift, however, given the large decline in Entertainment employment in the last year (driven by a loss of 225 employees in creative and performing arts activities), and the relatively static growth in this sub-sector since 2016. Another factor could be temporary 'business churn' due to gentrification[12] in the LGA.

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	106 +1.0%	8%
Entertainment	487 +0.4%	39%
Food	657 -3.9%	53%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 30 in the appendix.

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[12] http://www.portphillip.vic.gov.au/understanding_gentrification.htm

The NTE in Western Australia

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	10,073 +1.2%	4.4%
Employment	117,590 +0.6%	8.7%
Sales Turnover	$14,168m +4.1%	3.3%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S1

Following strong growth over 2016 to 2017 across all key metrics, Western Australia's Core NTE has started to slow slightly with growth below the national average.

Core NTE establishments in Western Australia increased by 1.2% between 2017 and 2018, which is almost a third of what was achieved over the 2016 to 2017 period (+3.2%) and well below the national average (+2.5%). This modest growth did increase the number of establishments to almost 10,100, with a total employment of 117,590 (+0.6% since 2017) and a turnover of $14bn (+4.1%).

Figure 49: Trend in WA's Core NTE sector
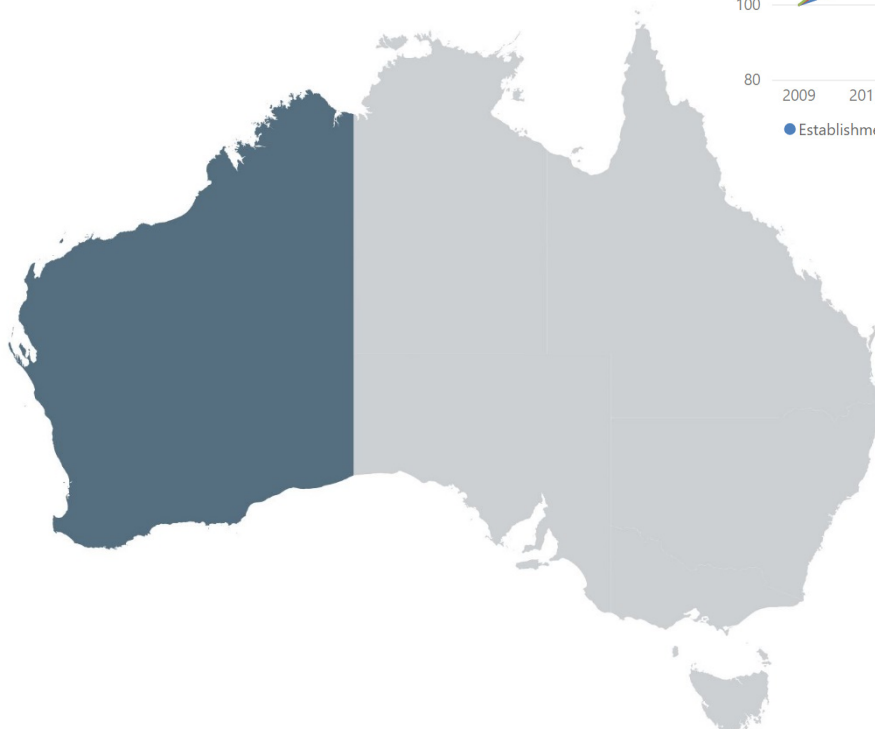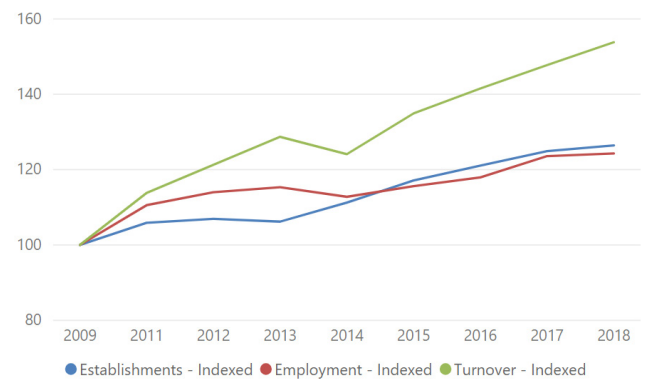
The mix of activities within Western Australia's Core NTE is slightly different to that of Australia, with Food being slightly more prominent (64% of establishments compared to 63% nationally), which is also the case for the Drink sub-sector (10% of Core NTE establishments compared to 8% in Australia). Conversely, Entertainment in Western Australia represents a smaller proportion (27%) of Core NTE to that of Australia (29%).

While Food and Drink are slightly stronger in Western Australia, their growth rates are markedly different; with Drink establishments declining by -1.8% since 2017 (almost returning to 2016 levels) and Food establishments increasing by +1.6%. This has had follow on effects to both employment (-2.5% and +0.5% respectively) and turnover (+1.5% and +4.3%).

The key driver behind Core NTE employment growth in Western Australia is Entertainment, which has grown by +3.6% in the last year. This seems to mirror trends witnessed in other states, which have shown an increased prevalence of Entertainment activities.

In summary, growth in Western Australia has slowed a little in 2018 following its strong performance over the 2016 to 2017 period, but it is still increasing. This is particularly true in Food, which has increased modestly, and Entertainment which has shown particularly strong employment growth over the last year. Drink activities have declined slightly suggesting a potential shift in Core NTE activities that should be monitored.

Figure 50: WA's and Australia's Core NTE turnover

Western Australia   Australia

● Food ● Entertainment ● Drink
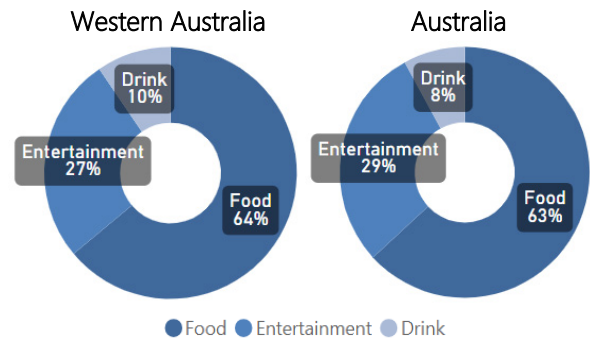
Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	962 -1.8%	10%
Entertainment	2,674 +1.3%	27%
Food	6,437 +1.6%	64%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/S3

For more information see Table 31 in the appendix.

City of Perth

Measure	Core NTE 2018 & Change 17-18	% Total Economy
Establishments	622 +2.8%	5.1%
Employment	9,930 +5.3%	8.6%
Sales Turnover	$1,079m +12.1%	3.1%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L1

Perth's Core NTE has shown strong growth between 2017 and 2018, particularly in Drink and Entertainment.

Following slow growth in Core NTE employment and turnover between 2016 and 2017, Perth has outperformed Western Australia in the last year increasing its establishment base by +2.8% and growing employment and turnover by +5.3% and +12.1% respectively.

Figure 51: Change in Core NTE in Perth and WA (17-18)

As noted above this is driven by Drink (+9.2% establishments), and Entertainment (+6.2%). Food by comparison has remained relatively static (+1.1%) between 2017 and 2018.

City of Perth
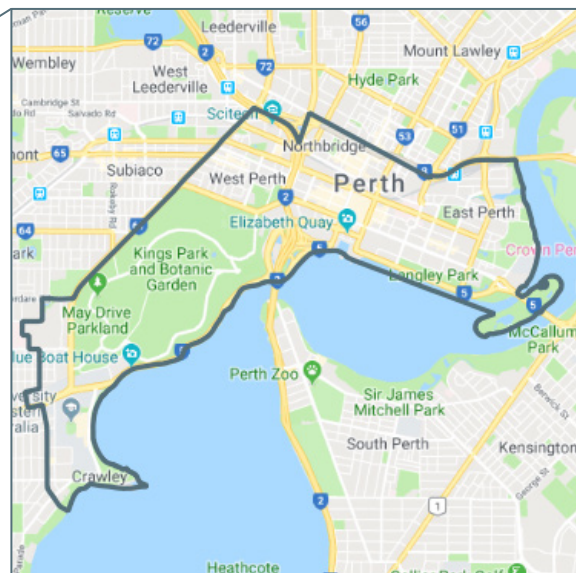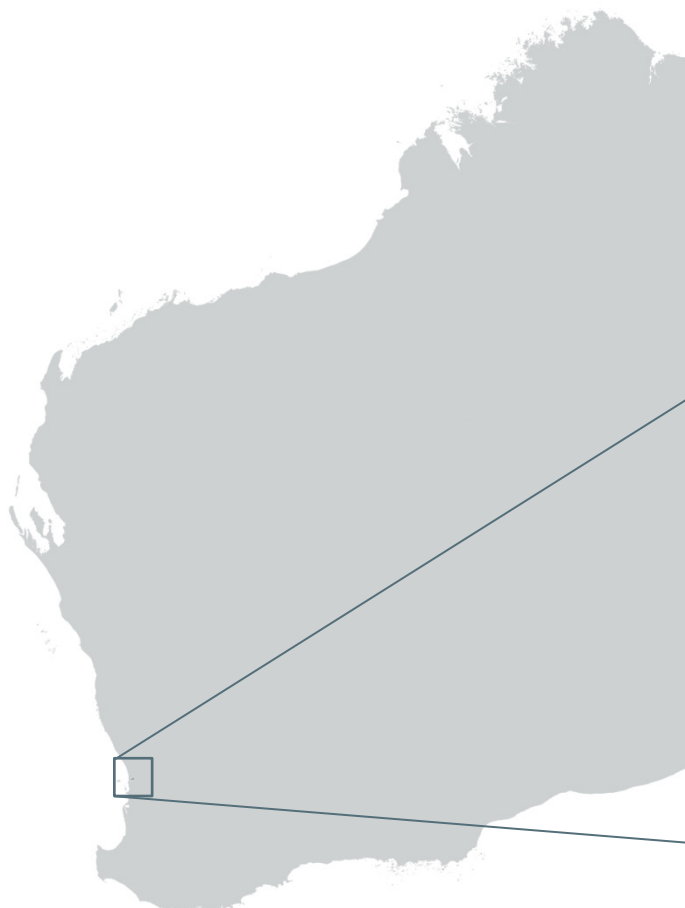
Food represents an above average proportion of Core NTE Establishments in Perth (74% compared to 64% in WA). The strong growth rates experienced in Drink and Entertainment mark the continuation of a rebalancing of activities, with the Food share contracting from 76% in 2016.

Figure 52: Perth's establishments by sub-sector
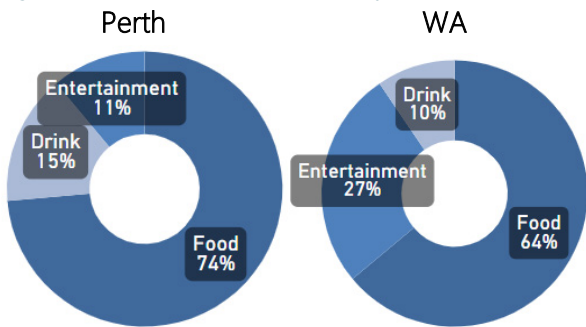
This does look to be the case, especially when considering that Drink (+9.3%) and Entertainment (+18.7%) added nearly 200 employees each to the Core NTE between 2017 and 2018; accounting for the majority of the sector growth over the period.

Sub-sector	Establishments & Change 17-18	% Core NTE
Drink	95 +9.2%	15%
Entertainment	69 +6.2%	11%
Food	458 +1.1%	74%

Based on 2019 Australian Bureau of Statistics data (CABEE 2014-2018 dataset), Ref: WTS1/L3

For more information see Table 32 in the appendix.

Appendix

Photograph sources

Table 5: Sources for images used[13]

| Council Area	Source
Australian Capital Territory	Supplied by CCCLM
City of Adelaide	www.flickr.com/photos/dynamix00/
Brisbane City Council	www.flickr.com/photos/lennykphotography/
Central Coast Council	www.flickr.com/photos/162037208@N08/
City of Darwin	www.flickr.com/photos/httpwwwflickrcomphotostopend/
City of Gold Coast	www.flickr.com/photos/bruvva/
City of Hobart	www.flickr.com/photos/michelphan/
Georges River Council	www.flickr.com/photos/gemmastiles/
Liverpool City Council	www.liverpool.nsw.gov.au/community/major-events/nye-2018
Maroondah City Council	www.qicgre.com/places/eastland
City of Melbourne	Supplied by City of Melbourne
City of Newcastle	https://www.flickr.com/photos/dexxus/
Northern Beaches Council	www.flickr.com/photos/chgross/
City of Parramatta	www.dailytelegraph.com.au/newslocal/parramatta/praise-for-parramattas-proud-beating-heart/news-story/ea490bf9fae8e906f245bb4997b78ad0
City of Perth	https://www.flickr.com/photos/125983633@N03/40163346231/in/photostream/
Port Phillip City Council	www.flickr.com/photos/scott-s_photos/
City of Sydney	www.flickr.com/photos/mklapper/
Front cover	Supplied by Ingenium Research via JRP Studio

Methodology

Definitions

As noted in the Glossary (page 6), the NTE refers to economic activity which occurs at establishments primarily between the hours of 6 p.m. and 6 a.m. This is then broken down further into Core, Non-Core and Supply.

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 codes used to define Core, Non-Core and Supply are provided below.

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[13] All photographs have been cropped to 5:3 aspect ratio from their original.

Table 6: Core NTE ANZSIC definition

NTE Sub-Sector	ANZSIC	Description
Drink	4123	Liquor Retailing
	4520	Pubs, Taverns and Bars
Entertainment	551[14]	Motion Picture and Video Activities
	900	Creative and Performing Arts Activities
	911	Sports and Physical Recreation Activities
	912	Horse and Dog Racing Activities
	913	Amusement and Other Recreation Activities
	920	Gambling Activities
	4530	Clubs (Hospitality)
	9534	Brothel Keeping and Prostitution
Food	4511	Cafes and Restaurants
	4512	Takeaway Food Services

Table 7: Non-Core NTE ANZSIC definition

NTE Sub-Sector	ANZSIC	Description
Care	771	Public Order and Safety Services
	840	Hospitals
Creative Education	8212	Arts Education
Cultural	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
	4129	Other Specialised Food Retailing
Hospitality	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 n.e.c.
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

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[14] For all LGAs except City of Sydney, Motion Picture and Video Activities (ANZSIC 551) is captured as a Supply NTE activity. For City of Sydney, the Floor and Employment Survey in the original Sydney Cost Benefit Analysis work (2011) allowed further disaggregation of this ANZSIC to reach Motion Picture Exhibition (ANZSIC 5513), i.e. cinemas, meaning it can still be presented in the following years. 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.

NTE Sub-Sector	ANZSIC	Description
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 8: 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

Data sources

Data was acquired from the Australian Bureau of Statistics (ABS) via bespoke request from their Counts of Australian Businesses, including Entries and Exits (CABEE), June 2014 to June 2018 dataset[15]. Through a collaborative approach with the ABS, the bespoke request covered the ANZSICs set out above for a total of 88 LGAs selected from current and past members of the LSGCN and population dense LGAs. In addition to these 88 LGAs, data was acquired from the CABEE dataset for federal and state / territory figures.

This dataset was analysed and modelled using additional ABS datasets including labour force data[16] and industry turnover[17] data. Once finalised, data was presented across the geographic areas of LGA, state / territory and Australia as a whole, by a variety of ANZSIC groupings including NTE sector and sub-sector.

In some cases, ANZSIC level data can be provided, but in others the numbers can be small leading to large percentage swings when reviewing comparatively between years. This can be problematic as the ABS applies perturbation[18] techniques when dealing with smaller numbers in order to maintain confidentiality of businesses involved in the dataset. This is the main reason why ANZSIC data is not published widely within this document and is only used in those LGAs where numbers are large enough.

Important points to note about the CABEE dataset

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

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[15] ABS Catalogue 8165.0 - Counts of Australian Businesses, including Entries and Exits, Jun 2014 to Jun 2018
http://www.abs.gov.au/ausstats/abs@.nsf/mf/8165.0
[16] ABS Catalogue 6202.0 - Labour Force http://www.abs.gov.au/ausstats/abs@.nsf/mf/6202.0
[17] ABS Catalogue 8155.0 – Australian Industry http://www.abs.gov.au/ausstats/abs@.nsf/mf/8155.0
[18] The ABS Catalogue 8165.0 (link at footnote 15) 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) http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/2011.0.55.001~2016~Main%20Features~Data%20Quality%20and%20Random%20Perturbation~18

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 whose legal structure means they have registered for separate ABNs may be counted multiple times.

Irrespective of any diversity of business activity undertaken, each establishment is classified to a single ANZSIC code based on the main source of industry value added (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 activities of one establishment, particularly where different activities are undertaken at different locations and the establishment is counted as a single unit.

Geographic boundaries

Changes introduced between 2015 and 2016-17 reports

A number of LGA boundary changes introduced across Australia during the previous report.

One LGA affected was the City of Parramatta, the boundary of which was revised in 2016[19]. This change saw parts of the previous Parramatta boundary combined with parts of The Hills Shire, Auburn City, Holroyd City and Hornsby Shire. While figures for this LGA do not look too different between 2015 and 2016, it should be noted that there is a disconnect in the time series between these years and this should be borne in mind when reviewing data over this period.

Another LGA affected was City of Perth, the boundary of which was also revised in 2016[20], absorbing part of the City of Subiaco (south of Aberdare Road). As above, this change creates a disconnect in the time series between 2015 and 2016. As 2016 and 2017 data for City of Perth was acquired from the CABEE 2017 dataset, both reporting years make use of the new LGA boundary.

In addition to this, the City of Perth is affected by a change in ABS methodology introduced in the CABEE 2017 dataset, which means data can now be provided by non-standard geographies (i.e. LGA, postcode, etc.).

Previously, ABS could only provide data at Statistical Area 2 (SA2) boundaries and LGA boundaries had to be constructed using these SA2s as building blocks. This approach correlates for other LGAs except in the case of Perth where the LGA boundary is particularly small. In this case, the SA2s used cover a larger area than the LGA boundary, meaning that in the past more businesses were counted in the data than were in the LGA (approximately 40% more). This should also be considered when reviewing data between 2015 and 2016.

As noted above, the approach of using SA2 areas as a proxy for LGA boundaries correlates well for all other LGAs. The ABS change to the use of actual LGA boundaries should be borne in mind when comparing 2016 or 2017 results to earlier years for LGAs. Data at state, territory or national levels are unaffected by this change.

Changes introduced between 2016-17 and 2018 reports

There were no notable changes to LGA boundaries covered in the 2016-17 and 2018 iterations of the report.

Four new NSW LGAs were introduced during the 2018 report, namely Central Coast, Georges River, Liverpool and Northern Beaches. Liverpool LGA has not changed for some time, but Central Coast, Georges River and Northern Beaches were all formed through amalgamations of other council areas during 2016. Their data is built up using a combination of the CABEE 2013-17 and 2014-18 datasets, meaning their new boundaries are reflected accurately within this report.

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[19] https://www.cityofparramatta.nsw.gov.au/council/governance-of-the-council/wards
[20] https://www.perth.wa.gov.au/city-perth-boundary-map

Core NTE sub-sector tables for states, territories and LGAs

Australian Capital Territory

Table 9: Australian Capital Territory – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	109	109	102	101	106	106	100	110	110	0	0.0%
Entertainment	427	422	415	407	415	418	429	441	413	-28	-6.3%
Food	872	957	965	962	1,059	1,119	1,156	1,201	1,226	25	2.1%
Establishments	**1,408**	**1,488**	**1,482**	**1,470**	**1,580**	**1,643**	**1,685**	**1,752**	**1,749**	**-3**	**-0.2%**
Drink	1,940	2,115	1,860	1,685	1,820	2,085	2,200	2,150	1,995	-155	-7.2%
Entertainment	5,555	5,745	5,355	5,500	5,875	6,165	6,760	6,920	6,580	-340	-4.9%
Food	16,920	18,010	19,890	19,425	18,020	18,895	19,030	20,625	21,340	715	3.5%
Employment	**24,415**	**25,870**	**27,110**	**26,610**	**25,715**	**27,145**	**27,990**	**29,695**	**29,915**	**220**	**0.7%**
Drink	$250	$264	$294	$166	$295	$270	$273	$274	$276	$2	0.6%
Entertainment	$694	$698	$609	$594	$679	$837	$927	$928	$925	-$3	-0.4%
Food	$1,426	$1,565	$1,807	$1,820	$1,768	$1,771	$1,844	$1,998	$2,144	$146	7.3%
Turnover (A$m)	**$2,370**	**$2,528**	**$2,710**	**$2,580**	**$2,742**	**$2,877**	**$3,044**	**$3,200**	**$3,345**	**$145**	**4.5%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/S3_CoreNTE

New South Wales

Table 10: New South Wales – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	2,717	2,777	2,786	2,735	2,818	2,817	2,868	2,910	2,926	16	0.5%
Entertainment	10,981	11,157	10,960	10,472	10,501	10,664	10,738	11,029	11,408	379	3.4%
Food	17,644	18,987	19,352	18,907	20,082	20,763	21,505	22,257	22,771	514	2.3%
Establishments	**31,342**	**32,921**	**33,098**	**32,114**	**33,401**	**34,244**	**35,111**	**36,196**	**37,105**	**909**	**2.5%**
Drink	44,125	44,890	40,940	41,150	40,660	42,670	43,115	43,560	44,495	935	2.1%
Entertainment	80,685	79,710	83,085	84,220	85,455	88,175	90,935	90,060	94,080	4,020	4.5%
Food	169,940	185,045	175,820	178,970	185,515	186,060	187,570	195,735	198,995	3,260	1.7%
Employment	**294,745**	**309,645**	**299,845**	**304,340**	**311,630**	**316,905**	**321,620**	**329,355**	**337,565**	**8,210**	**2.5%**
Drink	$4,925	$5,007	$4,971	$5,135	$5,525	$6,054	$6,436	$6,507	$6,820	$313	4.8%
Entertainment	$9,551	$9,246	$9,895	$9,459	$10,024	$12,709	$13,398	$13,188	$14,144	$956	7.2%
Food	$14,323	$16,084	$15,973	$16,532	$18,207	$17,440	$18,170	$18,960	$19,997	$1,037	5.5%
Turnover (A$m)	**$28,799**	**$30,337**	**$30,839**	**$31,126**	**$33,757**	**$36,203**	**$38,004**	**$38,656**	**$40,961**	**$2,305**	**6.0%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/S3_CoreNTE

Table 11: Central Coast Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	61	72	65	70	5	7.7%
Entertainment	373	368	382	429	47	12.3%
Food	671	704	742	773	31	4.2%
Establishments	**1,105**	**1,144**	**1,189**	**1,272**	**83**	**7.0%**
Drink	725	745	675	765	90	13.3%
Entertainment	2,475	2,365	2,580	2,795	215	8.3%
Food	4,435	4,995	5,280	5,315	35	0.7%
Employment	**7,635**	**8,105**	**8,535**	**8,875**	**340**	**4.0%**
Drink	$87.1	$93.5	$86.1	$100.1	$14.0	16.2%
Entertainment	$257.5	$255.0	$282.1	$336.8	$54.7	19.4%
Food	$404.2	$466.3	$492.9	$518.6	$25.7	5.2%
Turnover (A$m)	**$748.8**	**$814.8**	**$861.0**	**$955.4**	**$94.4**	**11.0%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Table 12: Georges River Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	31	31	30	25	-5	-16.7%
Entertainment	155	146	148	153	5	3.4%
Food	594	613	610	581	-29	-4.8%
Establishments	**780**	**790**	**788**	**759**	**-29**	**-3.7%**
Drink	490	470	445	405	-40	-9.0%
Entertainment	1,090	1,100	1,130	1,070	-60	-5.3%
Food	3,210	3,295	3,450	3,380	-70	-2.0%
Employment	**4,785**	**4,870**	**5,025**	**4,855**	**-170**	**-3.4%**
Drink	$78.0	$77.0	$76.7	$73.8	-$2.9	-3.8%
Entertainment	$121.7	$127.3	$127.1	$134.3	$7.2	5.7%
Food	$292.6	$307.5	$322.2	$329.6	$7.3	2.3%
Turnover (A$m)	**$492.3**	**$511.7**	**$526.1**	**$537.7**	**$11.6**	**2.2%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Table 13: Liverpool City Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	20	23	24	32	8	33.3%
Entertainment	142	140	140	141	1	0.7%
Food	375	417	429	457	28	6.5%
Establishments	**537**	**580**	**593**	**630**	**37**	**6.2%**
Drink	210	265	235	335	100	42.6%
Entertainment	615	640	645	625	-20	-3.1%
Food	1,915	2,305	2,325	2,515	190	8.2%
Employment	**2,745**	**3,205**	**3,205**	**3,480**	**275**	**8.6%**
Drink	$25.5	$30.0	$28.6	$43.3	$14.7	51.2%
Entertainment	$66.3	$70.8	$72.3	$72.2	-$0.1	-0.1%
Food	$174.8	$215.2	$217.2	$245.5	$28.3	13.0%
Turnover (A$m)	**$266.6**	**$316.0**	**$318.1**	**$361.0**	**$42.9**	**13.5%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Table 14: City of Newcastle – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	111	101	98	102	104	111	104	111	114	3	2.7%
Entertainment	278	276	277	259	266	243	219	231	235	4	1.7%
Food	400	412	428	412	447	470	435	480	491	11	2.3%
Establishments	**789**	**789**	**803**	**773**	**817**	**824**	**758**	**822**	**840**	**18**	**2.2%**
Drink	1,740	1,540	1,765	1,950	1,775	1,675	1,710	1,880	2,040	160	8.5%
Entertainment	3,830	3,420	3,760	3,450	3,520	3,470	3,415	3,420	3,605	185	5.4%
Food	4,490	4,800	4,875	5,565	6,125	6,730	6,835	7,590	7,635	45	0.6%
Employment	**10,060**	**9,760**	**10,400**	**10,965**	**11,425**	**11,875**	**11,960**	**12,890**	**13,280**	**390**	**3.0%**
Drink	$173.3	$160.0	$160.3	$180.2	$173.0	$158.8	$164.3	$180.9	$201.7	$20.8	11.5%
Entertainment	$459.1	$400.8	$463.7	$437.2	$426.3	$477.8	$501.0	$514.6	$613.1	$98.6	19.2%
Food	$378.4	$417.4	$442.7	$514.2	$597.0	$637.4	$662.5	$736.4	$773.3	$36.9	5.0%
Turnover (A$m)	**$1,010.8**	**$978.2**	**$1,066.7**	**$1,131.6**	**$1,196.3**	**$1,274.0**	**$1,327.8**	**$1,431.8**	**$1,588.1**	**$156.3**	**10.9%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Table 15: Northern Beaches Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	72	73	73	77	4	5.5%
Entertainment	590	573	576	609	33	5.7%
Food	735	734	769	796	27	3.5%
Establishments	**1,397**	**1,380**	**1,418**	**1,482**	**64**	**4.5%**
Drink	760	795	810	905	95	11.7%
Entertainment	2,895	2,840	2,605	2,625	20	0.8%
Food	4,870	5,070	5,360	5,485	125	2.3%
Employment	**8,525**	**8,705**	**8,775**	**9,010**	**235**	**2.7%**
Drink	$116.7	$120.9	$124.3	$143.4	$19.1	15.4%
Entertainment	$295.4	$300.7	$280.5	$316.8	$36.3	13.0%
Food	$444.2	$473.0	$500.4	$534.8	$34.4	6.9%
Turnover (A$m)	**$856.3**	**$894.6**	**$905.2**	**$995.0**	**$89.8**	**9.9%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Table 16: City of Parramatta[21] – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	45	46	46	41	37	34	43	46	35	-11	-23.9%
Entertainment	240	250	235	222	217	225	198	224	244	20	8.9%
Food	646	761	804	778	886	924	897	901	953	52	5.8%
Establishments	**931**	**1,057**	**1,085**	**1,041**	**1,140**	**1,183**	**1,138**	**1,171**	**1,232**	**61**	**5.2%**
Drink	550	700	680	710	570	490	535	565	410	-155	-27.4%
Entertainment	2,350	2,245	2,255	1,965	2,010	2,120	2,080	2,205	2,375	170	7.7%
Food	4,745	5,160	5,885	5,240	5,735	6,020	5,255	5,310	5,715	405	7.6%
Employment	**7,645**	**8,100**	**8,815**	**7,910**	**8,310**	**8,630**	**7,870**	**8,075**	**8,500**	**425**	**5.3%**
Drink	$75.4	$86.9	$61.6	$65.5	$55.6	$46.4	$85.3	$90.2	$78.3	-$11.9	-13.1%
Entertainment	$282.1	$263.0	$277.9	$248.3	$243.2	$292.1	$445.3	$448.3	$519.1	$70.7	15.8%
Food	$399.8	$448.3	$534.7	$484.3	$558.6	$570.3	$490.3	$495.7	$557.4	$61.7	12.5%
Turnover (A$m)	**$757.3**	**$798.2**	**$874.2**	**$798.1**	**$857.4**	**$908.7**	**$1,020.9**	**$1,034.2**	**$1,154.8**	**$120.6**	**11.7%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Table 17: City of Sydney – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	416	430	562	546	576	530	547	574	595	21	3.7%
Entertainment	835	874	838	783	826	823	859	870	878	8	0.9%
Food	2,730	3,065	3,290	3,148	3,354	3,254	3,378	3,428	3,463	35	1.0%
Establishments	**3,981**	**4,369**	**4,690**	**4,477**	**4,756**	**4,607**	**4,784**	**4,872**	**4,936**	**64**	**1.3%**
Drink	4,310	3,990	4,805	5,180	5,285	5,145	5,125	5,570	5,360	-210	-3.8%
Entertainment	6,735	6,575	6,785	6,915	7,285	7,200	7,430	7,610	7,850	240	3.2%
Food	17,300	16,650	18,335	18,255	19,305	20,065	20,930	22,395	22,405	10	0.0%
Employment	**28,345**	**27,210**	**29,930**	**30,350**	**31,875**	**32,410**	**33,485**	**35,580**	**35,610**	**30**	**0.1%**
Drink	$445.1	$422.4	$534.7	$586.3	$631.1	$597.2	$602.3	$641.6	$648.7	$7.1	1.1%
Entertainment	$939.5	$886.1	$961.8	$1,006.5	$1,014.2	$1,139.2	$1,186.4	$1,245.2	$1,375.4	$130.2	10.5%
Food	$1,458.0	$1,447.3	$1,666.0	$1,687.1	$1,880.8	$1,900.4	$2,028.6	$2,172.3	$2,269.5	$97.2	4.5%
Turnover (A$m)	**$2,842.6**	**$2,755.8**	**$3,162.5**	**$3,279.9**	**$3,526.1**	**$3,636.8**	**$3,817.3**	**$4,059.1**	**$4,293.6**	**$234.5**	**5.8%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

[21] Please note that the Parramatta LGA boundary was revised in 2016 causing a disconnect in the time series from 2015 to 2016. For additional details please see Section 0, page 31.

Northern Territory

Table 18: Northern Territory – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	54	55	62	57	56	60	50	50	47	-3	-6.0%
Entertainment	235	239	221	229	221	207	221	231	222	-9	-3.9%
Food	365	397	394	389	406	415	449	473	458	-15	-3.2%
Establishments	**654**	**691**	**677**	**675**	**683**	**682**	**720**	**754**	**727**	**-27**	**-3.6%**
Drink	1,960	2,055	3,205	3,270	5,285	2,730	2,580	2,415	2,430	15	0.6%
Entertainment	3,320	4,025	2,290	2,280	2,940	5,860	6,400	6,130	6,195	65	1.1%
Food	6,720	7,205	8,830	8,515	7,905	9,235	9,705	10,155	10,105	-50	-0.5%
Employment	**11,995**	**13,285**	**14,325**	**14,070**	**16,130**	**17,825**	**18,685**	**18,700**	**18,725**	**25**	**0.1%**
Drink	$215	$221	$385	$427	$599	$293	$260	$243	$255	$12	5.0%
Entertainment	$377	$475	$268	$216	$354	$971	$1,005	$945	$974	$28	3.0%
Food	$566	$626	$802	$851	$776	$866	$940	$984	$1,015	$31	3.2%
Turnover (A$m)	**$1,158**	**$1,322**	**$1,455**	**$1,494**	**$1,729**	**$2,129**	**$2,204**	**$2,172**	**$2,244**	**$72**	**3.3%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/S3_CoreNTE

Table 19: City of Darwin – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	21	23	23	19	17	15	19	18	15	-3	-16.7%
Entertainment	124	126	118	105	101	99	113	110	120	10	9.1%
Food	197	214	220	214	219	229	263	281	266	-15	-5.3%
Establishments	**342**	**363**	**361**	**338**	**337**	**343**	**395**	**409**	**401**	**-8**	**-2.0%**
Drink	315	320	515	515	525	435	430	415	385	-30	-7.2%
Entertainment	1,905	1,830	1,755	1,620	1,610	1,555	1,700	1,675	1,750	75	4.5%
Food	2,330	2,340	2,605	2,620	2,725	3,100	3,155	3,550	3,285	-265	-7.5%
Employment	**4,550**	**4,490**	**4,870**	**4,760**	**4,860**	**5,090**	**5,290**	**5,640**	**5,420**	**-220**	**-3.9%**
Drink	$37.9	$39.1	$46.6	$47.8	$51.2	$41.0	$41.9	$40.1	$38.8	-$1.3	-3.1%
Entertainment	$228.5	$214.4	$216.4	$205.6	$195.3	$214.2	$244.7	$242.9	$289.2	$46.3	19.1%
Food	$196.2	$203.5	$236.5	$242.1	$265.8	$293.7	$305.9	$344.3	$333.0	-$11.3	-3.3%
Turnover (A$m)	**$462.6**	**$457.0**	**$499.5**	**$495.5**	**$512.3**	**$548.9**	**$592.5**	**$627.4**	**$661.1**	**$33.7**	**5.4%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Queensland

Table 20: Queensland – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	1,217	1,183	1,153	1,138	1,127	1,147	1,144	1,143	1,163	20	1.7%
Entertainment	5,735	5,782	5,669	5,414	5,382	5,392	5,427	5,628	5,782	154	2.7%
Food	9,369	10,070	10,104	10,150	10,778	11,328	11,845	12,346	12,581	235	1.9%
Establishments	**16,321**	**17,035**	**16,926**	**16,702**	**17,287**	**17,867**	**18,416**	**19,117**	**19,526**	**409**	**2.1%**
Drink	21,115	22,635	24,975	23,630	22,915	23,555	23,340	24,335	24,710	375	1.5%
Entertainment	44,295	45,145	53,685	58,025	56,465	55,115	55,445	57,100	58,470	1,370	2.4%
Food	121,965	132,455	127,930	129,485	136,870	131,595	132,345	140,205	141,735	1,530	1.1%
Employment	**187,375**	**200,235**	**206,585**	**211,140**	**216,255**	**210,270**	**211,135**	**221,645**	**224,910**	**3,265**	**1.5%**
Drink	$2,081	$2,274	$2,742	$2,692	$2,741	$2,655	$2,733	$2,836	$2,960	$125	4.4%
Entertainment	$5,479	$5,462	$6,882	$6,805	$6,857	$8,485	$8,721	$8,858	$9,257	$398	4.5%
Food	$10,280	$11,513	$11,623	$12,577	$13,433	$12,335	$12,820	$13,582	$14,243	$661	4.9%
Turnover (A$m)	**$17,840**	**$19,249**	**$21,247**	**$22,074**	**$23,032**	**$23,475**	**$24,275**	**$25,276**	**$26,460**	**$1,184**	**4.7%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/S3_CoreNTE

Table 21: Brisbane City Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	262	280	271	268	262	259	278	281	297	16	5.7%
Entertainment	1,597	1,703	1,675	1,563	1,583	1,573	1,611	1,671	1,738	67	4.0%
Food	2,780	3,214	3,307	3,294	3,490	3,739	4,078	4,244	4,343	99	2.3%
Establishments	**4,639**	**5,197**	**5,253**	**5,125**	**5,335**	**5,571**	**5,967**	**6,196**	**6,378**	**182**	**2.9%**
Drink	4,580	4,480	4,475	4,890	4,555	4,295	4,500	4,605	4,555	-50	-1.1%
Entertainment	14,295	12,285	16,960	16,595	16,415	16,605	17,725	18,095	18,270	175	1.0%
Food	32,345	35,435	36,865	37,095	38,990	42,470	43,830	47,020	45,925	-1,095	-2.3%
Employment	**51,225**	**52,200**	**58,300**	**58,580**	**59,960**	**63,370**	**66,055**	**69,725**	**68,750**	**-975**	**-1.4%**
Drink	$417.4	$423.2	$406.5	$451.8	$443.7	$407.0	$444.8	$446.2	$474.4	$28.2	6.3%
Entertainment	$1,834.2	$1,525.4	$2,091.1	$2,101.5	$1,988.3	$2,285.2	$2,519.8	$2,589.4	$2,956.2	$366.7	14.2%
Food	$2,726.4	$3,080.1	$3,349.3	$3,428.2	$3,799.2	$4,022.4	$4,299.6	$4,616.1	$4,709.1	$92.9	2.0%
Turnover (A$m)	**$4,978.0**	**$5,028.7**	**$5,846.9**	**$5,981.5**	**$6,231.2**	**$6,714.6**	**$7,264.2**	**$7,651.8**	**$8,139.6**	**$487.9**	**6.4%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Table 22: City of Gold Coast – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	142	136	133	133	137	128	144	16	12.5%
Entertainment	988	940	931	961	988	1,021	1,088	67	6.6%
Food	1,757	1,700	1,795	1,865	1,965	2,067	2,149	82	4.0%
Establishments	**2,887**	**2,776**	**2,859**	**2,959**	**3,090**	**3,216**	**3,381**	**165**	**5.1%**
Drink	2,045	2,130	2,340	2,260	2,480	2,270	2,530	260	11.5%
Entertainment	10,160	9,535	9,435	9,825	9,810	10,310	11,215	905	8.8%
Food	16,975	17,120	18,110	19,655	20,015	21,950	21,805	-145	-0.7%
Employment	**29,180**	**28,785**	**29,885**	**31,735**	**32,305**	**34,530**	**35,550**	**1,020**	**3.0%**
Drink	$185.8	$196.7	$227.8	$214.0	$239.8	$220.0	$257.4	$37.4	17.0%
Entertainment	$1,252.4	$1,207.3	$1,143.4	$1,352.1	$1,407.2	$1,500.7	$1,836.6	$336.0	22.4%
Food	$1,542.2	$1,582.4	$1,764.8	$1,861.4	$1,939.7	$2,128.8	$2,208.7	$80.0	3.8%
Turnover (A$m)	**$2,980.4**	**$2,986.4**	**$3,136.0**	**$3,427.6**	**$3,586.7**	**$3,849.4**	**$4,302.8**	**$453.4**	**11.8%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

South Australia

Table 23: South Australia – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	799	779	783	780	792	806	795	792	788	-4	-0.5%
Entertainment	1,766	1,774	1,702	1,614	1,578	1,600	1,632	1,671	1,676	5	0.3%
Food	3,134	3,303	3,420	3,419	3,572	3,708	3,860	3,978	4,015	37	0.9%
Establishments	**5,699**	**5,856**	**5,905**	**5,813**	**5,942**	**6,114**	**6,287**	**6,441**	**6,479**	**38**	**0.6%**
Drink	16,075	17,150	14,880	13,260	12,230	12,690	12,455	11,935	11,990	55	0.5%
Entertainment	14,790	14,405	11,600	12,240	13,255	14,320	14,885	14,785	15,380	595	4.0%
Food	39,555	41,300	41,970	41,430	46,125	48,150	49,000	50,095	51,030	935	1.9%
Employment	**70,420**	**72,855**	**68,445**	**66,930**	**71,615**	**75,160**	**76,340**	**76,815**	**78,395**	**1,580**	**2.1%**
Drink	$1,604	$1,736	$1,548	$1,518	$1,412	$1,500	$1,521	$1,516	$1,555	$40	2.6%
Entertainment	$1,879	$1,773	$1,487	$1,307	$1,601	$2,167	$2,267	$2,226	$2,331	$105	4.7%
Food	$3,334	$3,590	$3,813	$3,915	$4,527	$4,513	$4,747	$4,853	$5,128	$275	5.7%
Turnover (A$m)	**$6,817**	**$7,099**	**$6,848**	**$6,740**	**$7,540**	**$8,181**	**$8,534**	**$8,594**	**$9,014**	**$420**	**4.9%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/S3_CoreNTE

Table 24: City of Adelaide – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18	
										Number	Percentage
Drink	118	109	112	110	133	131	142	133	139	6	4.5%
Entertainment	123	119	122	113	115	114	121	117	115	-2	-1.7%
Food	505	511	560	533	520	521	563	558	579	21	3.8%
Establishments	746	739	794	756	768	766	826	808	833	25	3.1%
Drink	2,335	2,225	1,900	2,125	2,355	2,255	2,330	2,305	2,135	-170	-7.4%
Entertainment	1,600	1,735	2,040	1,710	1,925	1,660	1,650	1,700	1,685	-15	-0.9%
Food	6,445	6,190	6,420	6,530	6,270	7,100	7,080	7,360	7,470	110	1.5%
Employment	10,380	10,145	10,360	10,360	10,550	11,015	11,060	11,365	11,290	-75	-0.7%
Drink	$214.4	$209.1	$172.6	$196.3	$229.5	$213.6	$225.5	$223.4	$216.5	-$6.9	-3.1%
Entertainment	$191.5	$203.3	$251.5	$216.4	$233.0	$228.7	$240.0	$248.9	$273.4	$24.5	9.8%
Food	$543.0	$538.0	$583.4	$603.3	$610.9	$672.4	$686.2	$714.0	$756.6	$42.6	6.0%
Turnover (A$m)	$948.9	$950.4	$1,007.5	$1,016.0	$1,073.4	$1,114.7	$1,151.7	$1,186.3	$1,246.5	$60.2	5.1%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Tasmania

Table 25: Tasmania – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18	
										Number	Percentage
Drink	227	246	250	235	215	224	224	234	230	-4	-1.7%
Entertainment	562	596	561	539	515	529	516	522	556	34	6.5%
Food	1,043	1,062	1,095	1,069	1,085	1,107	1,151	1,204	1,263	59	4.9%
Establishments	1,832	1,904	1,906	1,843	1,815	1,860	1,891	1,960	2,049	89	4.5%
Drink	4,310	4,260	4,925	4,885	3,585	3,740	3,445	3,635	3,385	-250	-6.9%
Entertainment	3,975	5,585	5,120	5,280	3,415	5,025	4,755	5,175	5,245	70	1.4%
Food	13,100	12,165	12,015	12,720	11,630	12,710	13,350	14,515	14,935	420	2.9%
Employment	21,390	22,005	22,060	22,890	18,630	21,475	21,550	23,330	23,565	235	1.0%
Drink	$415	$402	$533	$529	$433	$420	$461	$435	$441	$6	1.4%
Entertainment	$500	$688	$667	$623	$406	$781	$753	$804	$853	$50	6.2%
Food	$1,104	$1,057	$1,091	$1,085	$1,141	$1,191	$1,293	$1,406	$1,501	$95	6.7%
Turnover (A$m)	$2,019	$2,147	$2,291	$2,237	$1,980	$2,393	$2,508	$2,645	$2,795	$150	5.7%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/S3_CoreNTE

Table 26: City of Hobart – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18	
										Number	Percentage
Drink	71	70	69	64	59	62	59	61	54	-7	-11.5%
Entertainment	118	118	115	119	123	118	107	101	106	5	5.0%
Food	264	278	295	297	298	301	278	307	342	35	11.4%
Establishments	453	466	479	480	480	481	444	469	502	33	7.0%
Drink	1,215	995	1,020	1,075	1,060	1,100	1,145	1,060	960	-100	-9.4%
Entertainment	1,285	1,370	1,270	1,565	1,485	1,445	1,410	1,325	1,315	-10	-0.8%
Food	3,395	3,085	3,165	3,245	3,480	3,600	4,040	4,185	4,350	165	3.9%
Employment	5,895	5,445	5,455	5,885	6,020	6,145	6,595	6,575	6,625	50	0.8%
Drink	$110.5	$96.8	$92.7	$99.4	$103.2	$104.0	$111.4	$104.5	$96.6	-$7.9	-7.6%
Entertainment	$154.1	$160.4	$156.6	$197.8	$179.7	$198.6	$204.5	$197.9	$219.5	$21.6	10.9%
Food	$286.2	$268.0	$287.8	$299.9	$339.0	$341.1	$391.3	$406.0	$440.8	$34.9	8.6%
Turnover (A$m)	$550.8	$525.2	$537.1	$597.1	$621.9	$643.7	$707.3	$708.4	$757.0	$48.6	6.9%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Victoria

Table 27: Victoria – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	2,286	2,284	2,262	2,229	2,284	2,327	2,338	2,371	2,405	34	1.4%
Entertainment	7,746	7,999	7,854	7,659	7,750	7,908	7,969	8,262	8,663	401	4.9%
Food	14,327	15,807	16,173	16,236	17,013	17,650	18,559	19,224	19,776	552	2.9%
Establishments	24,359	26,090	26,289	26,124	27,047	27,885	28,866	29,857	30,844	987	3.3%
Drink	30,485	30,745	26,250	25,405	27,085	27,010	27,860	28,080	28,290	210	0.7%
Entertainment	53,730	56,850	49,775	51,760	54,305	59,910	63,785	66,675	69,270	2,595	3.9%
Food	136,765	153,165	150,465	151,710	158,225	159,360	167,440	176,005	182,360	6,355	3.6%
Employment	220,980	240,765	226,490	228,880	239,615	246,280	259,085	270,760	279,920	9,160	3.4%
Drink	$3,503	$3,597	$3,395	$3,366	$3,706	$3,869	$4,197	$4,261	$4,496	$235	5.5%
Entertainment	$6,927	$7,139	$6,532	$6,081	$6,795	$10,298	$11,009	$11,350	$12,107	$757	6.7%
Food	$11,527	$13,313	$13,670	$14,660	$15,529	$14,937	$16,220	$17,049	$18,325	$1,276	7.5%
Turnover (A$m)	$21,958	$24,048	$23,597	$24,107	$26,029	$29,105	$31,426	$32,660	$34,928	$2,268	6.9%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/S3_CoreNTE

Table 28: City of Melbourne – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	256	254	258	240	260	273	265	248	243	-5	-2.0%
Entertainment	456	495	501	468	488	475	473	468	497	29	6.2%
Food	1,325	1,639	1,686	1,658	1,732	1,652	1,697	1,689	1,770	81	4.8%
Establishments	2,037	2,388	2,445	2,366	2,480	2,400	2,435	2,405	2,510	105	4.4%
Drink	3,655	3,305	3,160	3,470	3,645	3,625	3,385	3,285	3,335	50	1.5%
Entertainment	6,430	5,300	5,470	5,590	5,560	5,210	5,520	5,420	5,730	310	5.7%
Food	13,860	15,640	16,000	16,780	17,370	18,230	19,385	21,665	22,065	400	1.8%
Employment	23,945	24,245	24,630	25,840	26,575	27,060	28,290	30,370	31,130	760	2.5%
Drink	$360.2	$345.0	$287.0	$320.6	$355.3	$343.2	$326.8	$307.1	$325.6	$18.5	6.0%
Entertainment	$770.8	$621.7	$674.6	$707.7	$673.8	$716.8	$816.8	$810.4	$968.5	$158.1	19.5%
Food	$1,168.1	$1,359.5	$1,453.5	$1,550.8	$1,692.3	$1,726.6	$1,878.5	$2,101.4	$2,235.1	$133.7	6.4%
Turnover (A$m)	$2,299.1	$2,326.2	$2,415.1	$2,579.1	$2,721.4	$2,786.7	$3,022.2	$3,218.9	$3,529.2	$310.3	9.6%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Table 29: Maroondah City Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	24	26	21	18	18	16	20	21	25	4	19.0%
Entertainment	112	121	115	102	96	78	94	98	116	18	18.4%
Food	197	216	221	212	231	224	239	244	276	32	13.1%
Establishments	333	363	357	332	345	318	353	363	417	54	14.9%
Drink	215	260	240	270	265	265	285	295	315	20	6.8%
Entertainment	1,135	890	900	855	800	625	625	735	805	70	9.5%
Food	1,275	1,365	1,465	1,420	1,530	1,575	1,850	1,745	2,025	280	16.0%
Employment	2,630	2,520	2,600	2,545	2,590	2,470	2,755	2,775	3,145	370	13.3%
Drink	$29.8	$36.2	$21.6	$24.9	$25.6	$25.2	$30.3	$31.4	$37.7	$6.4	20.3%
Entertainment	$136.3	$104.6	$110.7	$108.0	$96.8	$86.3	$92.0	$112.0	$138.6	$26.6	23.7%
Food	$107.5	$118.8	$133.1	$131.4	$149.0	$149.1	$179.3	$169.5	$205.4	$35.9	21.2%
Turnover (A$m)	$273.6	$259.6	$265.4	$264.3	$271.4	$260.7	$301.6	$312.9	$381.8	$68.9	22.0%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Table 30: Port Phillip City Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	112	115	109	114	117	119	113	105	106	1	1.0%
Entertainment	466	483	468	453	473	454	479	485	487	2	0.4%
Food	506	577	591	580	608	627	648	684	657	-27	-3.9%
Establishments	**1,084**	**1,175**	**1,168**	**1,147**	**1,198**	**1,200**	**1,240**	**1,274**	**1,250**	**-24**	**-1.9%**
Drink	1,605	1,565	1,540	1,570	1,625	1,560	1,465	1,500	1,425	-75	-5.0%
Entertainment	3,440	3,540	3,690	3,560	3,840	4,010	4,125	4,270	3,945	-325	-7.6%
Food	5,310	5,465	6,070	6,345	6,720	6,990	7,485	8,075	7,335	-740	-9.2%
Employment	**10,360**	**10,565**	**11,300**	**11,475**	**12,190**	**12,555**	**13,070**	**13,845**	**12,710**	**-1,135**	**-8.2%**
Drink	$172.5	$174.3	$139.8	$145.3	$158.4	$147.8	$145.1	$146.4	$151.1	$4.7	3.2%
Entertainment	$412.4	$415.1	$455.1	$450.6	$465.6	$551.7	$614.1	$662.9	$693.6	$30.7	4.6%
Food	$447.5	$474.9	$551.3	$586.5	$654.9	$661.9	$725.2	$783.2	$743.3	-$39.9	-5.1%
Turnover (A$m)	**$1,032.4**	**$1,064.3**	**$1,146.2**	**$1,182.4**	**$1,278.9**	**$1,361.3**	**$1,484.5**	**$1,592.5**	**$1,588.0**	**-$4.5**	**-0.3%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

Western Australia

Table 31: Western Australia – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	912	933	928	927	929	951	956	980	962	-18	-1.8%
Entertainment	2,420	2,524	2,498	2,411	2,437	2,519	2,576	2,640	2,674	34	1.3%
Food	4,635	4,979	5,094	5,123	5,497	5,862	6,113	6,333	6,437	104	1.6%
Establishments	**7,967**	**8,436**	**8,520**	**8,461**	**8,863**	**9,332**	**9,645**	**9,953**	**10,073**	**120**	**1.2%**
Drink	16,175	17,350	16,685	18,245	14,635	16,430	16,915	17,275	16,840	-435	-2.5%
Entertainment	14,870	17,710	18,890	18,745	19,090	18,855	19,385	19,465	20,165	700	3.6%
Food	63,555	69,545	72,295	72,125	72,985	74,110	75,265	80,190	80,590	400	0.5%
Employment	**94,605**	**104,605**	**107,870**	**109,115**	**106,710**	**109,395**	**111,565**	**116,935**	**117,590**	**655**	**0.6%**
Drink	$1,973	$2,248	$2,125	$2,410	$1,883	$2,338	$2,473	$2,635	$2,674	$39	1.5%
Entertainment	$1,881	$2,191	$2,477	$2,345	$2,384	$3,142	$3,275	$3,206	$3,395	$189	5.9%
Food	$5,357	$6,045	$6,568	$7,102	$7,163	$6,947	$7,291	$7,768	$8,098	$331	4.3%
Turnover (A$m)	**$9,211**	**$10,484**	**$11,170**	**$11,856**	**$11,430**	**$12,427**	**$13,038**	**$13,609**	**$14,168**	**$559**	**4.1%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/S3_CoreNTE

Table 32: City of Perth[22] – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	Change 2017-18 Number	Percentage
Drink	91	98	109	116	100	91	80	87	95	8	9.2%
Entertainment	129	131	126	128	113	98	62	65	69	4	6.2%
Food	457	502	516	534	556	599	456	453	458	5	1.1%
Establishments	**677**	**731**	**751**	**778**	**769**	**788**	**598**	**605**	**622**	**17**	**2.8%**
Drink	1,775	1,590	1,755	2,010	1,930	1,940	1,900	1,940	2,120	180	9.3%
Entertainment	2,150	1,810	1,490	1,405	1,385	1,330	1,190	1,045	1,240	195	18.7%
Food	6,505	6,245	6,365	6,795	6,490	7,335	6,735	6,445	6,570	125	1.9%
Employment	**10,430**	**9,640**	**9,610**	**10,210**	**9,805**	**10,600**	**9,825**	**9,430**	**9,930**	**500**	**5.3%**
Drink	$170.4	$158.5	$159.5	$185.8	$187.9	$183.6	$184.3	$188.1	$215.2	$27.2	14.4%
Entertainment	$257.5	$211.9	$183.6	$177.7	$167.6	$183.0	$170.5	$148.5	$197.7	$49.2	33.1%
Food	$548.3	$542.7	$578.2	$628.0	$632.6	$694.6	$652.6	$625.2	$665.6	$40.5	6.5%
Turnover (A$m)	**$976.2**	**$913.1**	**$921.3**	**$991.5**	**$988.1**	**$1,061.1**	**$1,007.4**	**$961.7**	**$1,078.6**	**$116.8**	**12.1%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/L3_CoreNTE

[22] Please note that the Perth LGA boundary was revised in 2016 and is also affected by a change in ABS methodology, both of which cause a disconnect in the time series from 2015 to 2016. For additional details please see Section 0, page 31.

Core NTE density rankings

Table 33: Ranking of Core NTE establishments density per km² in 2018 across the 88 LGAs analysed – part one

Position	LGA Name	State	Establishments	Density Per km²
1	City of Sydney	NSW	4,936	184.9
2	Waverley Council	NSW	706	75.1
3	Yarra City Council	VIC	1,372	70.4
4	North Sydney Council	NSW	730	69.5
5	City of Melbourne	VIC	2,510	67.1
6	Port Phillip City Council	VIC	1,250	60.4
7	City of Adelaide	SA	833	53.4
8	City of Perth	WA	622	45.4
9	Inner West Council	NSW	1,542	43.6
10	Burwood Council	NSW	301	42.4
11	Woollahra Municipal Council	NSW	497	40.4
12	City of Stonnington	VIC	998	38.8
13	City of Canada Bay Council	NSW	641	32.2
14	Willoughby Council	NSW	598	26.7
15	Randwick City Council	NSW	849	23.4
16	Glen Eira City Council	VIC	860	22.2
17	City of Boroondara	VIC	1,232	20.5
18	Georges River Council	NSW	759	19.8
19	Maribyrnong City Council	VIC	596	19.1
20	Moreland City Council	VIC	910	17.8
21	Bayside Council	NSW	854	17.1
22	City of Darebin	VIC	898	16.8
23	Bayside City Council	VIC	623	16.7
24	City of Ryde	NSW	667	16.5
25	Moonee Valley City Council	VIC	659	15.3
26	City of Parramatta	NSW	1,232	14.7
27	City of Whitehorse	VIC	920	14.3
28	City of Monash	VIC	1,146	14.1
29	Cumberland Council	NSW	932	13.0
30	City of Canterbury Bankstown	NSW	1,406	12.7
31	City of Stirling	WA	929	8.9
32	City of Charles Sturt	SA	475	8.7
33	Kingston City Council	VIC	791	8.7
34	City of Burnside	SA	220	8.0
35	Banyule City Council	VIC	499	8.0
36	Hobsons Bay City Council	VIC	441	6.9
37	Manningham City Council	VIC	770	6.8
38	Maroondah City Council	VIC	417	6.8
39	Fairfield City Council	NSW	676	6.7
40	City of Hobart	TAS	502	6.4
41	Ku-ring-gai Council	NSW	544	6.4
42	Northern Beaches Council	NSW	1,482	5.8
43	City of Greater Dandenong	VIC	711	5.5
44	City of Joondalup	WA	542	5.5

Table 34: Ranking of Core NTE establishments density per km² in 2018 across the 88 LGAs analysed – part two

Position	LGA Name	State	Establishments	Density Per km²
45	City of Brimbank	VIC	675	5.5
46	Knox City Council	VIC	610	5.4
47	Brisbane City Council	QLD	6,378	4.8
48	City of Newcastle	NSW	840	4.5
49	City of Blacktown	NSW	972	4.1
50	City of Darwin	NT	401	3.6
51	City of Frankston	VIC	413	3.2
52	City of Mitcham	SA	234	3.1
53	Sutherland Shire Council	NSW	1,002	3.0
54	City of Gold Coast	QLD	3,381	2.5
55	City of Casey	VIC	921	2.2
56	The Hills Shire Council	NSW	807	2.1
57	Liverpool City Council	NSW	630	2.1
58	Wyndham City	VIC	813	1.5
59	City of Whittlesea	VIC	670	1.4
60	Penrith City Council	NSW	553	1.4
61	Hume City Council	VIC	637	1.3
62	Campbelltown City Council	NSW	387	1.2
63	Hornsby Shire Council	NSW	547	1.2
64	Wollongong City Council	NSW	815	1.2
65	Mornington Peninsula Shire	VIC	768	1.1
66	Lake Macquarie City Council	NSW	599	0.9
67	City of Greater Geelong	VIC	973	0.8
68	Central Coast Council	NSW	1,272	0.8
69	Melton City Council	VIC	374	0.7
70	Albury City Council	NSW	206	0.7
71	Sunshine Coast Council	QLD	1,417	0.6
72	Maitland City Council	NSW	245	0.6
73	Byron Shire	NSW	352	0.6
74	Nillumbik Shire Council	VIC	262	0.6
75	City of Ballarat	VIC	445	0.6
76	Moreton Bay Regional Council	QLD	1,096	0.5
77	Cairns Regional Council	QLD	725	0.4
78	City of Wodonga	VIC	119	0.3
79	Port Stephens Council	NSW	217	0.3
80	City of Launceston	TAS	325	0.2
81	Townsville City Council	QLD	598	0.2
82	City of Greater Bendigo	VIC	374	0.1
83	Hawkesbury City Council	NSW	295	0.1
84	Port Macquarie-Hastings Council	NSW	320	0.1
85	Toowoomba Regional Council	QLD	556	0.0
86	Mackay Regional Council	QLD	302	0.0
87	Bathurst Regional Council	NSW	148	0.0
88	Queanbeyan-Palerang Regional Council	NSW	186	0.0