The Australian Night Time Economy
2009 - 2014
Federal, State and Key LGAs

A review of NTE economic performance commissioned by

National Local Government Drug and Alcohol Committee

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economic research & business intelligence

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1. The Night Time Economy

This is the third in a series of economic measurements of the Australian Night Time Economy[1].

It is commissioned by the National Local Government Drug and Alcohol Committee (NLGDAAC) on a consistent basis of analysis and use of ABS data as the previous two studies.

The commission reflects both the important and the challenging role that the NTE plays in many societies and its dynamic role in major urban economic centres.

Whilst the acronym NTE stands for Night Time Economy it has never been viewed as an economic sector.

Some studies in both the UK[2] and the USA have been devoted to the measurement of the NT Economy[3].

A systematic approach to NTE measurement using common relevant activity identifiers and reliable national level data was the hallmark of the new Night Mix Index (NMI) developed by Terry Bevan of TBR and Alistair Turnham of Make Associates in the UK in 2010.

The NMI measures all economic performance by establishments in a given data series in order to contextualise NTE change within the wider economic performance of the subject geography.

In so doing it identifies the following groups of activities as well as studying Core NTE in greater detail.

- Core NTE - establishments which directly provide the consumer services at the point of demand
- Non-Core NTE – establishments that comprise firms and other organisations that deliver supply line services which support the Core NTE. As such they are not the subject of focus in this work.
- Non NTE – these establishments comprise all other economic activities in a specified geography.

This approach is translated to the Australian economy supported by statistical evidence provided to the consultants by the Australian Bureau of Statistics.

The subject of NTE measurement across a range of different subjects is the Achilles Heel of the Night Time Economy agenda. This includes variation and non-compatible data in a number of fields

- Economic performance
- Crime against the person
- The relationship of night time activities to alcohol and drug usage
- The specific impact of anti-social behaviour on the costs and priorities of Hospitals, Ambulance services, Police services and a range of community services from Public Health to litter collection

Seeking to optimise the benefits of the NTE and to minimise its shortcomings requires a holistic approach

- Strategy that is locally operationalised and nationally supported
- Structure that brings all stakeholders into continuous dialogue
- Shared principles about the objectives and impacts of NTE activity
- An evaluative process of performance change that is standardised
- Adequate data across all key fields to support sensible decisions

[1] See 2009-11 Report and 2009 to 2013 Report – TBR - T Bevan and others

[2] A cost benefit analysis of the Evening and Night Time Economy in Westminster – July 2015 – T.Bevan ; P Hadfield ;TBR

[3] The $10 billion impact of the Night Life Industry on New York City – January 2004 – Audience Research and Analysis

The subject of the NTE will remain outside the field of successful governance and strategy until common understanding of reliably sourced costs and benefits informs dialogue. Building appropriate pictures of these costs and benefits is only possible where common standards and descriptions apply and where a transparency exists in methodology to dispel doubts about reported changes in outcomes.

In any geography where cost and benefit is measured it is always the case that the NTE brings greater benefits than costs. Given this positive cost benefit ratio the primary agenda is

- What sort of NTE do we want?
- How can this be fully funded?
- From where should this funding be streamed?

This commission in economic measurement supports these necessary objectives and requirements.

The Core NTE revenue figures in this study do not reflect the substantial taxation benefits generated by the NT economy some of which may be directly identified in local tax collection and some of which become the subject of Federal, State and Territory and LGA redistribution or application.

The support of the Australian Bureau of Statistics is acknowledged in making this analysis possible.

Fully understanding the statistical background; the observations and the technical process requires a consideration of the entire report including

- The definitions of the SIC fields describing the Core NTE, collected at Section 12 Appendix A
- The background literature referenced in the report at Section 13 Appendix B
- The Core NTE establishment and employment change data by LGA in Section 14 Appendix C
- The Glossary of Terms used in the report which is at Section 15 Appendix D
- The Methodology and Context found in Section 3
- The limitations that flow from the use of a national public sector managed business database that must respect the legal rights to privacy of businesses and other organisations.
- Comment on the possible effects of firm anonymity at LGA levels is to be found at Section 3.3 – Data Quality below. Broadly speaking there is little impact on statistics at the Federal level but limitations in geographical attribution of firms at LGA levels will always qualify 100% accuracy.

The consultants have taken considerable steps to ensure that limitations do not influence the measured comparative change in performance of LGAs between the years 2009 to 2014.

2. Executive Summary

This report measures the economic performance of the overall Australian Night Time Economy (NTE). The NTE in States, Territories and the NTEs in 14 key urban LGAs from 2009 to 2014 including all state and territory capitals except Canberra. Commentary in the report is based upon change in levels of annual sales revenue with associated firm number and employment number changes where this is usefully supportive. The report focusses on the Core NTE and not its wider supply chain relationships which are designated as Non-Core NTE.

2.1 The LGAs

- Adelaide City Council (SA)
- Brisbane City Council (QLD)
- Byron Shire Council* (NSW)
- City of Newcastle (NSW)
- Parramatta City Council (NSW)
- City of Port Philip (VIC)
- City of Darwin (NT)
- City of Hobart (TAS)
- Maroondah City Council (VIC)
- City of Melbourne (VIC)
- City of Perth (WA)
- City of Sydney (NSW)
- Frankston City Council* (VIC)
- City of Gold Coast* (QLD)

*Denotes from 2012 only

2.2 Statistical Focus

The study focusses on changing NTE economic performance over the time period 2009 to 2014[4] and to give study continuity across the full six year period this latest report is aligned with the information incorporated in the initial study[5] which covered the period 2009 to 2011.

We have eliminated the statistical impact which is introduced by the decision of the ABS to rebalance firm numbers between establishments of different cohort employment size in 2012 data.

The impact of this ABS change would be to greatly reduce the number of firms with employment of more than 20 people in the ABS cohort research frame and therefore reduce apparent employment and sales revenue in LGAs compared to any set of later figures against earlier years.

This produced unlikely absolute and percentage changes at LGA ANZSIC levels. Therefore we opted for consistent comparative accuracy across these six years.

Change is the most important dynamic in this type of activity analysis and absolute accuracy at a point in time is beyond any currently available statistics.

Whilst the ABS change may improve the future accuracy of its data outputs we wish to reflect NTE economic change in a consistent manner and to do so must exclude such changes in its data template which portray as economic change that which results from a change in the data collection rules.

At the LGA and ANZSIC NTE activity level of detail this subject of local data accuracy continues to require dialogue with the ABS which is unused to the forensic level of examination that we wish to apply.

[4] FOR THE AVOIDANCE OF DOUBT 2009 IS THE FINANCIAL YEAR 2008/9

[5] The Australian NTE – 2009 – 2011 T Bevan, A License, M Lester

In statistical terms the overriding task has been to ensure continuity of comparison.

2.3 Change in the Australian Core NTE

The scale of the Australian Core NTE as a sub economy is similar in annual sales revenue to reported Australian Tourism[6] if all domestic, international and business tourism is included.

2.3.1 Australian Core NTE Sales Revenue Change

In 2014 we estimate the Australian Core NTE to have sales revenues of $108 billion and its Core NTE activities employed over one million people.

On a like for like basis the Australian Core NTE increased its overall sales revenue (excluding GST) from $90 billion in 2009 to $108 billion in 2014 – an increase of 20%.

The increase is pronounced from 2013 to 2014 at 5.6% or $6 billion of the measured 2014 figure.

This is a time when most economic commentaries notice flattening or slowing in the wider economy.

Total Australian economy sales revenues increased by 14.7%[7] to just over $3000 billion in the six year period. The rate of growth of the Core NTE was therefore 1/3rd higher than the wider economy.

Within each of the six years the reported figure is not very different to the measured rate of inflation[8] by the Reserve Bank. Over the six years of the study the Core NTE part of the economy is measured as growing on average at about 1% more per annum than the wider economy[9].

Inflation may be cited at a total level of13%[10] in this 6 year time frame.

In 2014 the value of Core NTE Food led business increased to 57.8% of all Core NTE revenue

In 2014 31.2% of all Core NTE sales revenue was generated in New South Wales and 24.2% in Victoria.

In 2013 this was 30.8% and 24% respectively and therefore these States both slightly increase shares in NTE activity on a like for like basis. This is driven by the NTE economies of Sydney and Melbourne.

ACT at 2.5%, Tasmania at 1.8% and Northern Territory at 1.6% deliver the smallest proportions of overall Core NTE national revenues.

In the LGA locations in this study Adelaide, Brisbane, Melbourne, Newcastle, Port Philip, Sydney and Byron all exceed the 13% revenue growth which approximates to measured inflation in the same period whilst Hobart and Parramatta equal it.

Some Core NTEs in LGAs have gone backwards in inflation adjusted monetary value terms

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[6] Tourism Australia – Annual Report 2013-14 – total visitor expenditure - $102 billion

[7] Rounded to 15% in Table 5 below

[8] Suggested to aggregate to c13% over this period by the Reserve Bank

[9] See Table 5 below

[10] Reserve Bank of Australia figures to end June 2014

2.3.2 Australian Core NTE Employment Change

In the financial year 2014 the Core NTE in Australia employed 1,006,298 people.

This is over one million people and 8.7% of all Australian employment

Employment in the NTE increased by 22,328 people in 2014 compared to 2013. (See Table 4: All NTE employment and all Australia employment – 2009 - 2014 below)

Non-Core NTE and NTE Supply organisations which partly depend upon the NTE employed a further 17.1% of the Australian workforce or a further 1,968,809 people.

In total 25.8% of all Australian employees were connected directly or indirect with the NTE through Core activities or through Non-Core supply chain and supplier company activities

Overall employment in the Australian economy flat lined between 2013 and 2014 whilst Core NTE activity saw an employment increase of 2.2% in the same time frame.

2.3.3 Australian Core NTE Establishment Summary

In 2014 96,769 establishments or firms are categorised as Core NTE.

They represent 4.6% of all Australian firms and have increased by 7.9% in numbers since 2009.

The rate of increase of all other Non-Core NTE Australian firms over 2009 – 2014 is measured at 3.1%.

Most of the firm increase in the overall economy and in the NTE had occurred by 2011 which supports the wider view of the overall slowing of the economy in more recent time frames.

2.4 Change in the LGA Studied Geographies

The 14 LGAs in this study represent 21.4% of all Core NTE Australian sales revenues in 2014[11].

Of this $23 billion subtotal of NTE revenue Sydney LGA generated 15.2% and Melbourne LGA 11.8%.

They are the two city centre LGAs whose geographies play the most important role in terms of large and diversified Core NTE centres that draw upon tourism, large work forces that travel into CBDs, local populations by size and educational establishments which provide demand from students.

Brisbane at 26.9% and Gold Coast at 13.5% are part of this 23 billion for participating LGAs but as explained elsewhere this performance should not be compared with LGA Melbourne and Sydney.

The 4 places might be compared at the Metropolitan level but in this more detailed approach to NTE measurement Brisbane and Gold Coast would need geographic identification in lower orders of geography, perhaps using SA2 area building blocks.

The overall average increase in sales revenue in Brisbane is proportionally larger than either Sydney or Melbourne which suggests that somewhere within the LGA Brisbane geography the NTE growth figures may be even higher than we can identify here. Such dynamics are important to the wide strategic

[11] See Table 13 Below

considerations about how and where NTE revenue is generated and this can bring unsustainable pressure on regulation unless policy response is based upon clear knowledge of high growth locations.

It may also suggest that the Brisbane leisure services sub economy is more dynamic than other places.

In the LGA administrations employment increase has ranged between 1.6% in Adelaide and 17.7% in Port Phillip (Brisbane is slightly below this at 17.1%) compared with the national figure of 9%.

Here again the overall Brisbane employment figure may suggest an internal local suburb dynamic within the LGA that is even higher than its 17.1%.

LGA Sydney is the lead Core NTE growth location with revenue up by $683 million[12]

This is a 24% increase in revenue since 2009

This percentage growth in Sydney is led by Food and Drinks led businesses.

The Drinks sector firm growth is sustained following the introduction of the successful small bars programme which, as part of Sydney 2030, is designed to deliver a smaller and better regulated model[13] with wider appeal across age ranges and to professionals working in the City Centre.

This impact is clear from the comparatively small average levels of employment within the extra firms.

At 13% the overall growth in revenue has nearly doubled in Adelaide since the last report.

Newcastle vies with Port Phillip in terms of its increase in Core NTE economic performance with revenue increases of $218 million and $246 million respectively.

At 14.3% Byron Shire shows continuing increase in Core NTE economic performance since 2012.

In 2014 Sydney LGA has the largest Core NTE CBD at $3.526 billion[14]. Melbourne is 2nd at $2.721 billion.

However as we explain elsewhere in the report, such precise league tabling can be misleading.

The footprint of the Core NTE of Melbourne extends into Yarra City and Port Phillip and Port Phillip is prominent in its own right in the Core NTE LGA figures in this report.

Food led businesses continue to comprise the largest part of the Core NTE economy.

In Food Melbourne continues to show the largest change with $524 million in additional sales since 2009.

With 2014 sales revenue close to $1.7 billion and at 62.2% of all Core NTE revenue (50.8% in 2009) its food led increase completely out performs the national picture for change in Food led businesses.

The national average change of food led businesses was up from 53% to 56.5% of total Core NTE.

[12] NB This ignores change in the jurisdiction of Brisbane LGA which in scale is a different economic geography

[13] Maximum 60 customers at one time

[14] We exclude Brisbane in this statement because of its geographic span

The Melbourne Food led sub sector showed the largest $ increase since 2009 of $524 million and 44.9% in measured sales growth

2.5 Comparative LGA NTE Performance

In studying 14 very different locations it is easy to overlook the differences in achievements of individual places. It is for this reason that in the future we have proposed the use of the Profiling Tool such that LGAs may clearly select what they wish to study from the analysed annual data changes.

The Tool will permit user authorities to both concentrate on their own performance and to configure comparison with other places where they feel it appropriate. As a diagnostic tool it will permit our client to add different facets of comparative measurements which would allow correlations such as those between the volume of Core NTE economic activity and the incidence of types of recorded crime.

The kaleidoscope of differences and data reported in this study underline the importance of a more locally focussed and improved data collection model to help clarity for local analysis and policy.

The bulleted subject line highlights below illustrate the difference in the NTEs and point to the need for study and focus on local performance.

Comparison between locations – if relevant – can always be provided. This is especially straightforward using a profiling tool which allows the user to select comparisons.

As in the last study each of one these highlights are drawn from the analysis of the latest data and each in turn prompts further questions which relate to opportunity for local performance.

- Adelaide – Increased Entertainment revenue of $41 million is a key feature in performance
- Brisbane – Largest increase in revenue at $1,253 million but not comparable with leading LGAs.
- Byron Shire – High growth with the highest % employment change in the study.
- Darwin – Shows a 35% increase in Drinks led revenue
- Frankston – Does continuing lack of NTE growth require wider assessment?
- Gold Coast – As enigmatic as Brisbane - analysis needs to focus on more local geography levels.
- Hobart – A standout % improvement in Entertainment Revenues and achieved 2012 to 2013.
- Maroondah – One of the lowest overall % levels of NTE revenue. Opportunity or CBD Impact?
- Melbourne – Continues its established reputation as the Leisure Food Capital of Australia.
- Newcastle – The same overall % growth in Core NTE revenue as Melbourne LGA.
- Parramatta - Decline in drink and entertainment more than compensated by food growth.
- Perth – Strong growth in food and apparent weakness in entertainment led change.
- Port Philip – Growth of 46% in food illustrates the food cluster effect with Melbourne LGA
- Sydney – Growth in food and drink led segments are diversifying its Core NTE economy base

3. Report Context and Methodology

The National Local Government Drug and Alcohol Committee (NLGDAAC) intends to encourage ways of sharing best practice to improve the quality and safety of the Night Time Economy.

In this study we update information on the economic impact of the NTE and we ask questions about

- Size – the establishments, employment and sales value at the points of delivery of consumer services.[15]
- Change – direction of travel and specific key facets of the direction of the NTE.
- Role – Its characteristics in meeting leisure needs.

This study is the third of a series and began with an initial report on the Australian Night Time Economy[16] for the time period 2009 to 2011. This analysis captures all time periods from 2009 to 2014.

The NTE is in fact a wide ranging number of services that meet the leisure interests of individuals, family groups and friends seeking to interact for a range of different social and economic purposes.

It is the Core NTE that is measured to assess economic performance in consumer facing locations.

There is considerable debate about the relationship of the NTE to alcohol and substance abuse; the need to regulate types of outlet and the capacity to optimise safe and attractive centres.

Aspects of anti-social behaviour do play themselves out in the territory of the Night Time Economy which leads to public anxiety and to debate about the source and application of scarce resources and funds.

The economic benefits of the Night Time Economy do not fully inform this debate.

In this study the NLGDAAC addresses this context. Those few studies which have examined its economics point unanimously to the Night Time Economy delivering high levels of employment and revenue to the community and that tax generated from activities far exceed any assessments of attributed NTE costs[17].

Together with the application of best practice, finding a basis to agree how sources of revenue may clearly cover directly attributable cost is the primary NTE challenge.

Studies demonstrate both the direct and indirect benefits of the Night Time Economy and clarify that it is quite possible to fund community health and safety through the proceeds of taxation[18].

Here we look anew at both the picture of change in the Australian NTE economy and in greater detail at the performance of the NTE in 14 of the NLGDAAC member authorities. These authorities hold some of the largest Australian Night Time economies within their boundaries.

3.1 Participating Local Government Authorities

Adelaide City Council (SA)
Brisbane City Council (QLD)
Byron Shire Council* (NSW)
Newcastle City Council (NSW)
Parramatta City Council (NSW)
City of Sydney (NSW)
Frankston City Council* (VIC)
Gold Coast City Council* (QLD)
Maroondah City Council (VIC)
City of Port Philip (VIC)

[15] This is based upon the standard definition of the Core NTE

[1616] Measuring the Australian Night Time Economy – A First Analysis 2009 to 2011 – T Bevan, M Lester

[17] See Sydney CBA Study ; Westminster CBA Study 2015 ; Greater London Authority study of 32 London Boroughs

[18] A Cost Benefit Analysis of the Sydney Night Time Economy 2010 – T. Bevan, M Lester, A Turnham

City of Darwin (NT) City of Hobart (TAS)
City of Melbourne (VIC) City of Perth (WA)
* Denotes the three participant LGAs that joined Study 2 in 2013.

NTE activity levels are driven by population concentration and related commercial and social activities. Normally speaking the greater the levels of population concentration the greater the importance of the NTE within a local economy and the greater the challenges that present in the management of services.

Very large NTEs result from a combination of residence, employment concentration within a specific geography and from tourism and revenue from students in further education.

A local geography needs to be carefully addressed in its own right if stakeholders are to introduce the most effective use of information for local strategic improvement. This study by no means reaches the level of detailed information that is needed for a complete strategic local evaluation but it pushes the boundaries of knowledge well beyond what would otherwise be known.

The scale of the Brisbane LGA presents different challenges of governance that cannot usefully be compared to say Sydney or Melbourne LGAs. This is because both Sydney and Melbourne jurisdictions are more precisely collocated with the main metropolitan concentrations of Core NTE activity.

Locations, such as Hobart, Adelaide and Perth are similar in this respect.

Gold Coast City presents as a broadly distributed NTE economy like Brisbane. Two facts follow from this

- If there is to be comparison for strategic policy it is important to consider similar places.
- The utility of analysis depends upon data that gives as clear a picture of an NTE as is possible. Brisbane – for example –could be brought into sharper focus if study followed the geographic pattern of NTE clustering within its local precincts or post codes[19].

Agreement on the provision of activity detail at levels of local geography will require continuous dialogue with the ABS to take into account its responsibility for guarding against inappropriate public disclosure.

3.2 Primary Focus

This report concentrates on the following

- Describing the National NTE picture and how it has changed in the last six years
- Examining the trends in the sub segments of the Core NTE (Drink, Entertainment and Food)
- Similarly reviewing ANZSIC activity levels of change within those Core sub segments
- Drawing out key national messages
- Confirming the broad economic impacts at State levels
- Linking those messages by the examination of ANZSIC levels of Core NTE change in the LGAs
- Reporting LGA level change by estimated and consistent measurement of annual sales revenues

It is at LGA Level and below where policy focussed on improvement should be sustained.

In this report we have located data on local level establishment numbers and employment in Section 14 Appendix C to simplify examination of comparative change through sales revenue alone.

[19] The ABS warn against precise reliance on post codes but in this field they may facilitate NTE 'node' or precinct identification

Examining sales revenue impact is probably the most important facet of establishment performance as the underlying debate is really about 'who' should fund NTE services and 'how' this should be done.

Evaluation of local performance will show difference from place to place and lead to quite different questions from location to location. This study will provide full Core NTE data which includes employment and establishment change within the NTE and in comparison to the overall economic performance of their geographies from 2009 to 2014.

3.3 Data Quality

The data used in this analysis is supplied by the ABS to a pre agreed template which draws out the performance of the Core NTE based upon the model which we call the Night Mix Index or NMI.

The NMI uses commonly accepted public activity descriptions (Standard Industrial Classifications or SICs) for performance comparison across local, national and international geographies[20]. In this third study the ABS has agreed to revert to the local activity detail level available for the 2009 to 2011 study.

There is still a long way to go in fully understanding change in Core NTE revenue dynamics.

At the LGA level unless we know that a specific Core NTE establishment is correctly collocated in the geography or perhaps reported as part of a Group at another location we can never be fully confident of the absolute values that emerge in analysis within an individual LGA.

However we can be sure that comparative change is correctly represented and by reference to other dynamics such as State and Territory and metropolitan level Core NTE figures we can sense check the absolute values.

Generally speaking it is the trend of movement in establishments, employment and revenue which is most helpful to understanding local NTE dynamics but if a more forensic approach is required then this will merit additional expenditure on private sector data or business survey.

In the case of LGA Sydney we have additional sense checks since our original figures were triangulated with the LGA Business Census and with data from the financial services provider – Dun & Bradstreet.

This report provides LGAs with the opportunity to consider whether and how it should develop its own forensic processes to extend what is available from the ABS ANZSIC data.

3.4 Definitions of NTE Activities

The NTE has linked supply economic relationships across a wide range of industries and services.

Below in Tables One and Two we note the activities that we include in our methodology for both Core Activities and Non-Core Activities.

We combine the activities of the Core NTE (Table One) with those of the Non-Core NTE (Table Two) to bring together those sectors of the economy that deliver the full supply chain in NTE service provision.

Much Non-Core economic activity is not NTE itself but some part of its service provision and therefore revenues would not exist without the Core NTE.

Our focus is on the Core NTE which defines visible NTE service providers to the leisure seeking public. Of note in Table 2 below is Hospitality (Hotels and other overnight accommodation) which we do not count in

[20] Comparison can be made between places like New York, Melbourne and London on the same basis.

Core NTE activities. Although some hotels provide drinks and food services their primary function is overnight accommodation which is not a direct NTE leisure activity service component.

Patrons may choose to go home or to a hotel after they complete an evening entertainment.

Similarly with the exception of liquor retailing (ANZSIC 4123) we include all retailing in Non-Core NTE since again retail outlets are not primarily sought for leisure activities and most are closed throughout much of the recognised NTE time frame from 6 p.m. to 6 a.m.

Table 1 Core NTE Activity Descriptions

NTE Core	ANZSIC	Activity
Drink	**4123**	Liquor Retailing
	4520	Pubs, Taverns and Bars
Entertainment	**4530**	Clubs (Hospitality)
	9001	Performing Arts Operation
	9002	Artists, Musicians, Writers and Performers
	9003	Performing Arts Venue Operation
	9111	Health, Fitness Centre & Gymnasia
	9112	Sports and Fitness Professionals
	9113	Grounds and Facilities Operations
	9114	Sports and Recreation Administration
	9121	Horse and Dog Racing
	9129	Other Horse and Dog Racing Activities
	9131	Amusement Parks and Centres
	9139	Amusement and other Recreational
	9201	Casino Operation
	9202	Lottery Operation
	9209	Other Gambling Activities
	9534	Brothel Keeping and Prostitution
Food	**4511**	Cafes and Restaurants
	4512	Takeaway Food Services

Table 2 Non-Core NTE Sectors

Non-Core NTE Sectors
Care
Cultural
Design
Education
Food
Hospitality
Infrastructure
Promotion
Research
Retail
Sports Education
Transport

All the broad sectors detailed in Table 2 above make up ANZSIC[21] level origin Non-Core NTE data.

The two economic sub sets of Core and Non-Core NTE are added to the wider local economy or the Non NTE economy and through common rules of measurement and a common source of data we can then understand the relative overall impact of the Core NTE within each specified local economy.

It is well documented that the leisure industries produce lower per capita economic performance than some of the more productive sectors such as finance, communications and mining.

Nevertheless they represent a key part of the economy. It is that part which contributes most to the ability of Australians to take pleasure in their leisure time. Similarly in Cities seeking to enhance reputation and revenue base the NTE is integral to enjoyment and to understanding the character and history of places which depend for income upon domestic, international and business tourism.

3.5 NTE Study Methodology

Our approach to this study grew out of work for Sydney LGA in 2010. The methodology applied to that work was based upon a translation of UK SIC definition of the NTE into Australian ANZSICs. The descriptions of activity are very similar.

In this new study the Australian Bureau of Statistics (ABS) data base has been commissioned in accordance with our NTE NMI classification to support the following objectives.

- Identification of the size and continuing change of the Australian NTE
- The economic contribution of the NTE to individual States
- Measurement of the Core NTE dynamics of a number of key LGA areas[22]
- Relevant comment on performance of these places and current trends
- Identification of the proportionate roles of food, entertainment and drinks led businesses

[21] Standard Industrial Classification (SIC)

[22] Canberra is not included in these figures but there is a proxy in the State level ACT figures

4. NTE Change in Federal Australia

In this latest study we examine how

- The Federal NTE changed and with what impact
- This change distributes across State economies and how the State NTE activities differ
- Key local Core NTE economic performance and how change is trending

The questions restated here were posed in earlier reports as being of strategic importance

- What is the relative size of the NTE economy to the rest of the Australian Federal economy?
- Is it growing or declining relatively and in what particular ways?
- Where are the major centres of Core NTE businesses clustered?
- How are these businesses performing when compared to other centres?

4.1 The Economic Significance of the Australian NTE - 2009 to 2014

Using the NTE activity descriptions we analyse change in all Australian establishments over the annual time frames from 2009 to 2014. This is followed by an analysis of employment and then revenue before drawing out conclusions.

In considering NTE economic performance we focus on Core NTE figures[23].

Non-Core figures represent the supply chain of firms that provide direct services to NTE outlets. Only a part of their activities are directed towards NTE related services.

Supply NTE (a separate category) describes businesses that make and market products for resale through Core NTE outlets. In so far as they are sold locally through Core NTE outlets their revenue is captured in the overall annual revenues of those establishments.

4.2 NTE Establishment Performance – Federal Australia

In Table 3 below we see that the total Australian firm base is estimated at 2,100,200 firms in 2014.

Of this number 352,522 16.8 % may have NTE connected commercial relationships (Core and Non-Core).

Overall Australian firms have increased by 2.4 % since 2009 and Core NTE firms 7.9%.

Table 3 reports modest increase for the all Australian firm base across the 2009 to 2014 time frame.

There has been virtually no change in total numbers since 2011.

The final column percentages in Table 3 and Tables 4 and 5 are rounded to the nearest whole number.

There is no particular reason why a broad national firm base would keep growing unless population is increasing at a high rate or structural or technical dynamics or international trade stimulate expansion[24].

Whilst there is not complete agreement amongst economists about the direction of change, none of these factors is at work in 2014[25]. See the cited reference to measured figures in 2015 when the ABS suggests that this year represents the weakest growth in nominal Gross Domestic Product since 1961-2.

[23] Clients do group Core and Non-Core NT Economy together. We do not recommend this.

[24] 3101.0 - Australian Demographic Statistics, estimated growth rate for 12 months to March 2015 – 1.4%

[25] 5206.0 Australian National Accounts : National Expenditure, Income and Productivity – June 2015

Table 3 : All NTE Firms and all Australian Firms 2009-14

Sector	2009	2011	2012	2013	2014	Change 2013-14	% Change 2013-2014	% Difference 2009-2014
Core NTE	89,670	94,516	94,961	93,355	96,769	3,414	3.7%	108
Non-Core NTE	239,534	241,327	237,238	229,038	228,591	-447	-0.2%	95
Supply NTE	25,376	27,064	27,250	26,691	27,162	471	1.8%	107
Total NTE	354,580	362,907	359,449	349,084	352,522	3,438	1.0%	99
Non-NTE	1,695,759	1,769,524	1,781,886	1,730,718	1,747,678	16,960	1.0%	103
Total Firms	**2,050,121**	**2,132,556**	**2,141,335**	**2,079,802**	**2,100,200**	**20,398**	**1.0%**	102
Core NTE %	4.4%	4.4%	4.4%	4.4%	4.6%	-	-	
Total NTE %	17.3%	17.0%	16.8%	16.6%	16.8%	-	-	

Source: ABS 2009/ 2014 TBR Ref: W1/S1 End column percentages are whole number rounded

When we examine the NTE components of the changes within the Australian firm base we do see a resilient picture with Core NTE posted c8% growth compared to the 3% in none NTE related firms.

However we should note that as with overall firm change the growth in NTE firms was primarily drawn from increase in 2009 and 2010. The curve flattens in 2011 with a 3.75% increase 2013 to 2014.

The Non-Core firm base contains at the same time the supply chain of the NTE and major service entities that have no primary commercial activities such as police and hospital services.

The numbers of Non-Core organisations has decreased slightly by some 447 entities and in 2014 comprised 12.2% of the entire Australia firm base (2009 – 12.9%).

The firm figures highlight the relatively dynamic role of Core NTE firms in the Australian economy.[26]

The Non-Core and Supply numbers represent businesses with some economic interdependency with the Core NTE activities.

All NTE economic activities span 16.8% of all Australian firms.

4.3 NTE employment performance – Federal Australia

In July 2014 seasonally adjusted Australian employment is estimated at 11,553,000 million[27]. This varies slightly from 2013 shown in Table 4 below and indicates how growth in employment has slowed since 2011 in the overall economy.

In spite of this the NTE has continued to provide additional employment with a slight increase in 2014 over 2013. There is an increase of 9% in Core NTE employment comparing 2014 to 2009.

In 2014 over 1 million people were employed in Core NTE related work

[26] ABS 2011 NTE derived statistics by TBR

[27] 6202.0 - Labour Force, Australia, Jul 2014

Table 4: All NTE employment and all Australia employment – 2009 - 2014

Sector	2009	2011	2012	2013	2014	Change 2013-14	% Change 2013-2014	% Difference 2009-2014
Core NTE	925,923	989,264	972,725	983,970	1,006,298	22,328	2.2%	109
Non-Core NTE	1,583,127	1,611,364	1,661,856	1,678,835	1,645,592	-33,244	-2.0%	104
Supply NTE	291,542	302,588	329,500	314,301	323,217	8,916	2.8%	111
Total NTE	2,800,592	2,903,216	2,964,082	2,977,107	2,975,107	-2,000	-0.1%	106
Non-NTE	8,385,988	8,649,741	8,554,280	8,593,623	8,577,751	-15,872	-0.2%	102
Total Emp.	**11,186,580**	**11,552,956**	**11,518,362**	**11,570,730**	**11,552,858**	**-17,872**	**-0.2%**	103
Core NTE %	8.3%	8.6%	8.4%	8.5%	8.7%	-	-	
Total NTE %	25.0%	25.1%	25.7%	25.7%	25.8%	-	-	

Source: ABS 2009/2014, TBR Ref: W1/S1 **End column percentages are whole number rounded**

4.4 NTE Sales Revenue performance – Federal Australia

From 2009 to 2014[28] all Sector Australian economy sales revenue increased by 15% to $3,043 billion.

Core NTE revenue increased from $90 billion to $108 billion in the same time frame and all NTE connected sales revenue stands at $628 billion which is 20.6 % of the total revenues recorded by Australian companies in the 2014 financial year.

The primary difference in this table is the sales revenue attributable to Supply NTE.

Whereas in firms and employment terms the Supply NTE posts figures that are roughly one third of the numbers for Core NTE, in revenue terms Supply is larger than the Core NTE.

These high revenues are due to firms that serve both national and export markets. They are only intrinsic parts of local NTEs in that they locate headquarters or plants or subsidiaries in specific geographies.

The relative rate of revenue increase of the Core NTE is 20% compared to 15% for all Australian economic activities over the six year time period.

Core NTE Revenue - increased from $90 billion in 2009

to $108 billion in 2014.

[28] This is always years to end June.

Table 5: All NTE revenue and all Australian revenue ($ million) 2009 - 2014

Sector	2009	2011	2012	2013	2014	Change 2013-14	% Change 2013-2014	% Difference 2009-2014
Core NTE	$90,170.7	$97,213.8	$100,157.1	$102,215.1	$108,238.6	$6,023.5	5.6%	120
Non-Core NTE	$328,399.3	$340,201.9	$374,352.0	$375,634.8	$388,578.7	$12,943.9	3.3%	118
Supply NTE	$111,473.4	$115,646.8	$129,996.4	$128,038.4	$131,308.1	$3,269.7	2.5%	118
Total NTE	$530,043.3	$553,062.5	$604,505.5	$605,888.2	$628,125.4	$22,237.2	3.5%	119
Non-NTE	$2,122,593.4	$2,211,386.1	$2,305,729.8	$2,380,252.1	$2,415,628.1	$35,376.0	1.5%	114
Total Revenue	**$2,652,636.8**	**$2,764,448.6**	**$2,910,235.3**	**$2,986,140.4**	**$3,043,753.5**	**$57,613.1**	**1.9%**	115
Core NTE %	3.4%	3.5%	3.4%	3.4%	3.6%	-	-	
Total NTE %	20.0%	20.0%	20.8%	20.3%	20.6%	-	-	

Source: ABS 2009/2014, TBR Ref: W1/S1 **End column percentages are whole number rounded**

4.5 Key Federal Australian NTE Changes

Table 6 below shows the $108 billion 2014 Core Federal Night Time Economy broken down by the detailed Core NTE activities and it compares the revenue change by activities from 2009 to 2014.

The big picture is that by 2014 Food led Core NTE activity accounted for 58% of all NTE sales volume.

This is slightly up on 2013 at 57% and has increased from 53% in 2009.

The Food Core NTE revenues have determined Core NTE growth with a 31% increase in the time period.

Of particular note in Table 6 below is that Food led business at c$62 billion of all sales in 2014 represent c58% of sales across Core NTE activities and Café and Restaurant outlet sales have grown by more than any other activity in Australian dollar terms.

The Food sub segment has always been the predominant NTE activity and has increased its share of total Core NTE sales revenue by 5% over the six year period.

At nearly $38 billion, sales through restaurants and cafes is far and away the biggest Core NTE activity followed by take away food outlet sales at $24.6 billion.

NB. It is simplistic to consider categories as mutually exclusive since food is also sold in drinks and entertainment outlets and drink is an important component of both food and drink revenues.

Growth since 2009 can be seen in the right hand column of Table 6 (2014). The green highlighting indicates activities that have grown at rates in excess of the overall c13% inflation change in the 6 years.

From this it can be seen that Pubs, Taverns and Bar sales have not kept pace with inflation but liquor retailing with an 18% increase is slightly ahead of increases attributable to inflation for the period.

Table 6: Economic Comparison Detailed Core NTE Activities – Australia – 2009 -2014

Core NTE Sub-Sector	Core NTE Activity Description	Firms 2014	Employment 2014	Turnover 2009 (A$m)	Turnover 2014 (A$m)	Turnover % +/- 2009
Drink	Liquor Retailing	2,265	19,920	$5,055	$5,966	18%
	Pubs, Taverns and Bars	6,067	108,294	$9,911	$10,628	7%
Entertainment	Clubs (Hospitality)	2,908	67,092	$5,139	$6,585	28%
	Performing Arts Operation	1,244	7,064	$1,063	$917	-14%
	Artists, Musicians, Writers , Performers	12,063	25,196	$3,903	$3,271	-16%
	Performing Arts Venue Operation	381	6,954	$771	$903	17%
	Health and Fitness Centres, Gymnasia	3,163	35,480	$4,828	$4,606	-5%
	Sports and Physical Recreation Clubs	1,718	6,898	$1,183	$895	-24%
	Sports and Physical Recreation Venues	1,561	28,889	$3,564	$3,750	5%
	Sports and Physical Recreation Services	280	6,105	$249	$792	219%
	Horse and Dog Racing Operations	35	4,387	$166	$569	242%
	Other Horse and Dog Racing Activities	1,935	9,532	$1,668	$1,237	-26%
	Amusement Parks and Centres Operation	868	14,840	$1,595	$1,926	21%
	Recreational Activities	1,038	8,004	$1,160	$1,039	-10%
	Casino Operation	22	4,880	$186	$634	241%
	Lottery Operation	305	2,230	$390	$289	-26%
	Other Gambling Activities	1,096	11,245	$1,271	$1,460	15%
	Brothel Keeping and Prostitution Services	328	2,014	$151	$226	49%
Food	Cafes and Restaurants	35,457	385,914	$29,488	$37,875	28%
	Takeaway Food Services	24,035	251,361	$18,429	$24,669	34%
	Core NTE Grand Total	**96,769**	**1,006,298**	**$90,171**	**$108,239**	**20%**

Source: ABS CABEE 2012/14 updating 2009-13 NTE Report, TBR Ref: W1/S1.1. **End column % is whole number rounded**

The Entertainment sub segment provides the most detailed ANZSIC breakdown of activities. Overall it has performed poorly compared to inflation with a 7% revenue increase. Drink is only slightly better at 11%.

Performance is not consistent in every location or in every entertainment activity.

- **Adelaide Entertainment businesses led its % Core NTE growth in this 6 year period.**
- **Hobart also showed above average growth in Entertainment at 16.6%.**

Total Core NTE Entertainment led sales in 2009 were $27.3 billion and by 2014 $29.1 billion.

We suggest that some aspects of this sub segment of the Core NTE merit deeper examination.

If one is studying say, all gambling activity, much gambling is now via web sites that may not even be Australian taxed based businesses. But so far as this study is concerned we reflect the level of establishments on the ground and their changing trade levels.

There are some movements in activities such as a broad creative sub category or sports and wellbeing which show both quite substantial increases and declines. For example sports and recreation clubs and venues show decline but sports and physical recreation activities substantial increase.

This may reflect the way that people are changing their approach to physical recreation rather than overall decline. It may also reflect change in categorisation of activity or evolution of service type within the broad category

Nevertheless the Entertainment sub sector does show a 1% decline as a % of all Core NTE sales revenue when comparing 2014 to the previous year 2013 and larger decline from 30% of Core NTE activity in 2009 to 27% in 2014.

4.5.1 Table 6 Highlighted points – Activity level changes –all Australia

- Liquor retailing has increased by 18% which marks a recent statistical upturn but is only just above inflation taken over the six years 2009 – 2014.
- Pub and bar revenues continue to perform at well below inflation rates suggesting that some of these businesses are struggling. On the other hand Club revenues have increased by 28%
- Without the increase in Clubs and Casino revenues the Core NTE Entertainment revenues would be static in dollar terms.
- The highest % growth in the Entertainment sub sector is in Horse and Dog racing operations. This is unusual and we are exploring the change with the ABS.
- Performing Arts and the incomes of Artists, Musicians, Writers and Performers have fallen back which is of concern although Performance Arts Venue sales have increased.
- Health and Fitness Gymnasia remains the largest Entertainment activity group at $4.605 billion although its revenues show 5% decline. Against this there is growth in the related Sports and Physical Recreation Services and this may reflect change in service delivery models.
- With 28% and 36% overall increases since 2009 respectively the two food activity groups continue to perform strongly. The growth has been $14 billion.
- The overall food led sub sector changes from $47.9 billion to $62.5 billion or a 30.5% overall increase and it remains the dominating set of activities at 57% of all Core NTE revenues.

Food led Revenue in the Core NTE grew by $14 billion over 2009-2014

5. NTE performance in Australian States

This report is primarily a study of the size and contribution of the Core NTE to the Australian economy as viewed through the lens of the federal economy and some of its key LGAs.

Section 5 links the overall National Economy through the States and Territories to the local geographies that represent the more detailed part of the study.

We have deliberately shortened the analysis at this level of geography in order to sustain focus on the national and local LGA performance. Tables below show us

- The role of States and Territories in the overall Australian economy and in the overall NTE market
- The different proportion of activity which the NTE represents in each State and Territory
- The estimated values of firms, employment and sales revenue generated by the NTE in each State and identical numbers for all State firms, employment and sales revenue in the same year.

Table 7: Distribution by State of NTE Firms and all Firms – 2014

Share of Australian NTE firms by State and Territory						
State	Core NTE		All NTE		All Firms	
Australian Capital Territory	1,580	(1.6%)	4,677	(1.3%)	25,573	(1.2%)
New South Wales	33,401	(34.5%)	121,326	(34.4%)	696,949	(33.2%)
Northern Territory	683	(0.7%)	2,389	(0.7%)	14,307	(0.7%)
Queensland	17,287	(17.9%)	65,494	(18.6%)	416,700	(19.8%)
South Australia	5,942	(6.1%)	22,120	(6.3%)	143,560	(6.8%)
Tasmania	1,815	(1.9%)	6,722	(1.9%)	37,009	(1.8%)
Victoria	27,047	(28.0%)	93,858	(26.6%)	545,944	(26.0%)
Western Australia	8,863	(9.2%)	35,654	(10.1%)	218,784	(10.4%)

Source: TBR Ref: W1/S2, 2014 Update of NTE analysis applying ABS 2012/14 CABEE data trends

Table 7 above identifies the numbers of NTE Firms – both Core and Non-Core that are present in each State in 2014 and the relative importance of NTE firms in each State by comparing the distribution of NTE firms in Australia and the comparative figures for the distribution of all Australian firms.

The State concentration of Core NTE firms is less than all Australian firm percentages in Queensland, South Australia and Western Australia and the same in Northern Territory.

The concentration of NTE firms in the State economy is higher than the percentage of all firms that are in NSW, Tasmania, Victoria and Australian Capital Territory.

The State with the highest overall % of Core NTE firms is New South Wales at 34.5%.

NSW also contains most absolute numbers of Core NTE firms at 33,401.

In Table 8 below we see very similar distributions of NTE employment.

Table 8: Distribution by State of NTE Employment and all Employment -2014

Share of Australian NTE employment by State and Territory						
State	Core NTE		All NTE		All Firms	
Australian Capital Territory	25,713	(2.6%)	63,675	(2.1%)	212,908	(1.8%)
New South Wales	311,629	(31.0%)	924,364	(31.1%)	3,615,196	(31.3%)
Northern Territory	16,132	(1.6%)	38,576	(1.3%)	131,211	(1.1%)
Queensland	216,255	(21.5%)	599,984	(20.2%)	2,338,873	(20.2%)
South Australia	71,615	(7.1%)	202,347	(6.8%)	807,763	(7.0%)
Tasmania	18,630	(1.9%)	62,432	(2.1%)	236,439	(2.0%)
Victoria	239,614	(23.8%)	740,691	(24.9%)	2,869,357	(24.8%)
Western Australia	106,710	(10.6%)	343,037	(11.5%)	1,341,110	(11.6%)

Source: TBR Ref: W1/S2, 2014 Update of NTE analysis applying ABS 2012/14 CABEE data trends

The major NTE State employers are New South Wales, Queensland and Victoria which is unsurprising given the overall distribution of population and economic activity. Similar patterns of distribution are shown across firm numbers, employment and sales revenue but we see a slight rebalancing of the importance of the NTE at State level when we look at Table 9 below, the sales revenue table.

Except for NSW, Tasmania and Victoria the proportion of revenue from Core NTE activities is slightly higher than the % State revenue from all business activities. Therefore it is disproportionately important to total revenue in five State and Territory economies. This is marked in ACT, NT and Queensland.

Table 9 Distribution by State of NTE Sales Revenue and all Revenue - 2014

Share of expended revenue by State and Territory ($ millions)						
State	Core NTE		All NTE		All Firms	
Australian Capital Territory	$2,742.3	(2.5%)	$12,584.3	(2.0%)	$51,130.7	(1.7%)
New South Wales	$33,757.1	(31.2%)	$197,611.0	(31.5%)	$952,386.0	(31.3%)
Northern Territory	$1,728.5	(1.6%)	$6,639.2	(1.1%)	$35,459.6	(1.2%)
Queensland	$23,031.7	(21.3%)	$121,037.6	(19.3%)	$600,834.3	(19.7%)
South Australia	$7,539.8	(7.0%)	$44,197.4	(7.0%)	$206,776.0	(6.8%)
Tasmania	$1,980.1	(1.8%)	$13,960.4	(2.2%)	$58,616.1	(1.9%)
Victoria	$26,028.8	(24.0%)	$159,463.6	(25.4%)	$767,278.4	(25.2%)
Western Australia	$11,430.3	(10.6%)	$72,632.0	(11.6%)	$371,272.3	(12.2%)

Source: TBR Ref: W1/S2, 2014 Update of NTE analysis applying ABS 2012/14 CABEE data trends

In Table 10 below we take a different look at these numbers to better understand the importance of the Core NTE within each State or Territory economy. We use Employment as a proxy for significance.

From this table we understand that the Core NTE is relatively most important to state economies in ACT followed by Northern Territory at 12.4% and 11.2% respectively of all employment.

There will be different explanations for this bearing in mind the geography and economic functionality of two geographies which in most respects could not be more different. But basic levels of drink and food related services are likely to result in a widely spread infrastructure across Northern Territory in support of sparser populations but relatively large numbers of commercial and private vehicle journeys including people not actually living in NT but who wish to access or cross it.

The usual diverse sector spread structure of developed regional economies will be absent from a geography as specialised in its range of sector organisation as ACT.

The most important fact to take from Table 10 is that 8.5% of all employment is based in Core NTE activities and that in the case of all States except South Australia this has increased over the 5 year time frame. The South Australia % does seem to be a continuing trend since it is seen across 2012 and 2013.

Structural changes in the South Australian economy make it most important that businesses that may provide future employment opportunity are supported.

The Victorian, Tasmanian and Western Australian figures are the lowest of the percentages which indicate economies slightly less dependent on Core NTE revenues.

Table 10: Core NTE Employment as % of all State Employment

	% Core NTE Employment by State				
State	**2009**	**2011**	**2012**	**2013**	**2014**
Australian Capital Territory	12.10%	12.40%	12.60%	12.40%	12.10%
New South Wales	8.40%	8.50%	8.30%	8.40%	8.60%
Northern Territory	9.70%	10.50%	11.20%	10.50%	12.30%
Queensland	8.20%	8.50%	9.00%	9.00%	9.20%
South Australia	8.70%	8.80%	8.30%	8.30%	8.90%
Tasmania	9.10%	9.20%	9.40%	9.90%	7.90%
Victoria	7.90%	8.30%	7.90%	7.90%	8.40%
Western Australia	7.80%	8.30%	8.10%	8.00%	8.00%
Australia	**8.30%**	**8.60%**	**8.40%**	**8.50%**	**8.70%**

Source: TBR Ref: W1/S2, 2014 Update of NTE analysis applying ABS 2012/14 CABEE data trends

6. LGA Core NTEs 2009 -2014 – Broad Comments

Many of the 14 Australian LGAs that are measured in this study are more identifiable for their differences than for any similarities of scale and geographic extent.

Gold Coast City LGA is a unique administrative geography with well over 500,000 people and many urban centres, including Surfers Paradise. The Brisbane LGA covers close to 70% of the entire Metropolitan Area of Brisbane with an even larger population than the Gold Coast.

By comparison the CBD hubs of Melbourne, Sydney, Perth and Adelaide are small physical geographies with relatively small resident populations but characterised by large daily movements of people for both work and for leisure purposes. CBD economic activities help fashion powerful NTE economic entities.

Locations such as Newcastle and Parramatta in New South Wales represent independent urban concentrations with both different and similar 'raisons d'etre' to the Capitals for their existence.

These differences underline that there is not simply one type of NTE. The socio economic character in each place leads to the need for differences in approach to strategic management.

All these places have NTE economies of one size, shape or another that are brought into a common template as the standard NTE activities which we interrogate in our analysis.

Each place has experience to share with the others. This is part of NLGDAAC study purpose. Table 11 illustrates the proportionality of the LGA study NTEs to all Australian NTEs based upon Firm numbers.

Brisbane LGA contains 5.5% of all Australian Core NTEs as measured in this study.

Non-Core NTE firms are not identified in the table.

Table 11 Core NTE Firms 2014

% of Core NTE Firms	LGAs in Study	Core NTE Firms	All Other Firms LGAs in Study	All Firms in all LGAs
5.5%	Brisbane	5334	114976	120310
4.9%	Sydney	4754	42679	47433
3.0%	Gold Coast	2860	58266	61126
2.6%	Melbourne	2480	36670	39150
1.2%	Port Phillip	1199	18028	19227
1.2%	Parramatta	1142	23729	24871
0.8%	Newcastle	817	13744	14561
0.8%	Perth	769	17362	18131
0.8%	Adelaide	767	15295	16062
0.5%	Hobart	480	6615	7095
0.4%	Frankston	360	9503	9863
0.4%	Maroondah	345	9663	10008
0.3%	Darwin	337	7009	7346
0.3%	Byron	315	5798	6113
22.7%	**Total**	**21959**	**379337**	**401296**
78.1%	*All other Australia*	74810	1319567	1698904
100.0%	**Total**	**96769**	**1698904**	**2100200**

Source: TBR Ref: W1/S2, 2014 Update of NTE analysis applying ABS 2012/14 CABEE data trends

Comparison in NTE activity between places is important but NTE activity is most relevantly considered in the context of its own individual scale, local background and future needs and challenges.

The LGA analysis beginning in Section 7 provides opportunity for each place to reflect upon change and how it might engage with change in the future to meet specific local objectives.

6.1 Introduction

The primary focus of Section 6 is scene setting for the more detailed examination of changing economic performance in the individual Core NTE economies in key local centres.

Not every major centre is covered but LGAs within Capitals with the exception of ACT all feature together with other collocated places linked to CBD hubs within each State.

In particular the Melbourne CBD and three associated LGAs in the Greater Melbourne Metropolitan area are included as is Parramatta which shares a hinterland with the economic hub of Sydney CBD.

In examining the performance of the LGAs we should emphasise that messages in the data require more detailed investigation at each local level to fully understand the nature of the performance and to integrate identified opportunity into local strategic change.

We have sought to help focus upon LGA performances by grouping them together where we believe that there is a better basis for LGA comparison and therefore Sections 7, 8 and 9 follow a sequence of

- State and Territory Capital NTEs - excepting Brisbane and Canberra which is not in the study
- Urban Hinterland NTEs
- Brisbane and Gold Coast

The distinctions have basis in scale and administration but the primary reason for the separation is to help support the clarity of presentation and consideration of the findings.

The LGAs are presented as tables and commentary at the ANZSIC activity level of detail.

6.2 ANZSIC Level Core NTE Detail

This is the first time since the first report covering the period 2009 to 2011 in which we have been able to show Core NTE activity performance by detailed ANZSICs.

The most precise level of business activity detail should be sought in addressing economic change at LGA level. This must sit with accuracy in summed totals and the provision of activity level data by the ABS will advance local understanding of change and therefore the ability to strategically plan for change and to respond to its impacts. There is opportunity to develop further detailed analysis with the ABS.

Nevertheless this is the first time that any of these NTEs has been analysed at this level since 2011.

Some questions will be posed requiring answers not immediately available without more forensic study.

We have used consistent definition to show consistent change over the six years from 2009 to 2014. It is obvious from a first examination of the data that what is needed from this point is interaction with LGA management in economic development and planning to facilitate optimal use of the information.

As data is only available from 2012 for Byron, Frankston and Gold Coast the baseline comparison of change which is growth in sales performance adjusted for inflation is different.

We do not present these findings as a sort of 'fait accompli' of what happened in location X, Y or Z through the time series. Instead we ask each LGA to study the figures and to respond to us with any views that it may have and to consider how the findings may be used and what the data improvement agenda should be with the ABS. We feel that this is the only possible approach if we are to ensure that the report is ultimately to catalyse or support improved strategies in local economies.

Interaction with individuals with local knowledge will be most able to bring practical insight to the findings. Therefore should you be from Adelaide or from Sydney or from any of the places alphabetically in between we enjoin you to read the tables in the following Sections and our comments on them and then respond to both expand the debate and to query a finding.

Since we focus in the report body upon Sales revenue and the changes in revenue by NTE activities we report full associated summaries of NTE firms and employment in Appendix C Section 14

Table 12 Core NTE Employment in LGAs in Study - 2014

Employment %	LGA	Core NTE Employment
5.96%	Brisbane	**59,958**
3.17%	Sydney	**31,871**
2.97%	Gold Coast	**29,887**
2.64%	Melbourne	**26,575**
1.21%	Port Phillip	**12,190**
1.14%	Newcastle	**11,422**
1.05%	Adelaide	**10,548**
0.97%	Perth	**9,803**
0.83%	Parramatta	**8,311**
0.60%	Hobart	**6,022**
0.48%	Darwin	**4,863**
0.40%	Byron	**3,996**
0.29%	Frankston	**2,886**
0.26%	Maroondah	**2,590**
21.95%		**220,882**
78.05%	*Rest of Australia*	**785,416**
100.00%	**Australia**	**1,006,298**

Source: TBR Ref: W1/S2, 2014 Update of NTE analysis applying ABS 2012/14 CABEE data trends

The tables in the report are not all those or indeed all the data that we have analysed about these places but dialogue should not begin with indigestible levels of data.

Until a practical Core NTE model is in operation such as the Profiling Tool we may only add to confusion in spitting out indigestible levels of additional data.

6.3 Adelaide – As an example of LGA level Core NTE Analysis

If we look into the detail of economic change in Adelaide over the period 2009 to 2014 and using employment as a proxy for change we would see that total employment in the Core NTE at 10,548 jobs is static compared to 2009.There is a small increase of 200 jobs in the Core NTE.

In a wider context overall employment in the LGA economy has declined by 10% from a 2009 starting figure of 92,961 jobs. It is the NTE that shows more resilient in supporting the LGA economy.

Within the detail of the Adelaide Core NTE figures the Drinks sub sector posts a similar number of jobs in 2014 to 2009 at 2,356 jobs but there is an increase between 2013 and 2014 of 231 jobs or 10% of all drinks sub sector jobs. Entertainment led jobs have increased and food led jobs have flat lined.

In fact it is Entertainment led jobs that have provided any real increase in NTE employment. Within the Core NTE Entertainment sub sector employment has increased by 20%.

But all these indicators whether supportive of growth or decline need to be seen within a wider and more detailed discussion of Adelaide economic performance with Adelaide stakeholders.

This will of course be true for every LGA location in the study.

6.3.1 Do we have Growth or Decline?

There is no consistent story.

The Adelaide story is driven partly by change in the South East Australian economy as well as by wider economic dynamics. The local picture in any place will always be influenced by regional and national and international trends but its specific dynamics may still be very different.

If we compare Adelaide with say Hobart we will see that Hobart Drinks led firms demonstrate no recent increase in jobs within the time frame of this study. Total Hobart Core NTE jobs are up 2.1% over the time frame and this comes almost entirely from increase in the Entertainment led sub sector.

Melbourne is a much larger and more complex NTE and here Core NTE jobs have risen by 11% compared to 2009 whilst overall employment in the LGA has declined from c 280,000 jobs to c 265,000 jobs.

The Core NTE increase is led by 3,511 more jobs in the Food sub sector.

These few examples illustrate the wide differences that exist across 14 different places.

The Profiling Tool will support improved local focus to query and build understanding of NTE impact.

Jobs and the firms that provide them are very important aspects of any local economic geography but if there is one subject that impedes economic growth in the NTE it sits within the dialogue about governance and financing. What is working; how are problems being tackled and where are stakeholders in the debate about the optimisation of economic performance.

The revenue that flows through the Core NTE is considerable. The costs that are required to sustain it are relatively small but agreement on the means to fund adequate NTE public sector cost budgets is scarcely on the agenda. Thus we recommend that focus should be kept as much on this subject as on regulation.

Its solution unlocks many other opportunities.

This is the key subject when one considers how the NTE agenda cab be moved forwards.

Our feeling is that questions prior to further NTE strategic dialogue should be informed by

Whose revenue?

Are revenue proceeds (whether from taxes or private development funded) distributed effectively to sustain a growing NTE market?

(This dialogue should include subjects not covered in this report such as direct and indirect taxation).

If not, what else could be done to modify revenue distribution such that community and public service provider concerns are addressed whilst businesses feel that the climate of engagement encourages growth?

6.4 Comparative Sales Revenue Performance of the 14 Centres

Table 13 below should be read in conjunction with the Sections that follow.

It clarifies the relative overall economic role of each LGA Core NTE within the contributions of the NTE to the Australian economy. We have already commented upon differences in the sizes of the geographic administrations and therefore the performance of Sydney LGA with over 3.5% of all Australian Core NTE revenue should not be lost amongst the Brisbane and Gold Coast figures.

Equally the performance of Melbourne and Port Philip should be noted at the head of the table.

Table 13 Proportion of all Australia Core NTE Revenue by LGA – 2014

% All NTE Revenue	LGA	$ Billion
5.76%	Brisbane	**6.231**
3.26%	Sydney	**3.526**
2.90%	Gold Coast	**3.136**
2.52%	Melbourne	**2.721**
1.18%	Port Phillip	**1.279**
1.11%	Newcastle	**1.196**
0.99%	Adelaide	**1.073**
0.91%	Perth	**0.988**
0.79%	Parramatta	**0.858**
0.58%	Hobart	**0.622**
0.47%	Darwin	**0.512**
0.38%	Byron	**0.416**
0.28%	Frankston	**0.307**
0.25%	Maroondah	**0.271**
21.40%	Sub Total	**23.136**
78.60%	*Rest of Australia*	***85***
100.00%	**Total**	**108.136**

Source: TBR Ref: W1/S2, 2014 Update of NTE analysis applying ABS 2012/14 CABEE data trends

Seemingly Brisbane is a much more successful NTE economy judged by revenue posted in 2014 since it seems twice the size of Sydney.

But the comparison has little value.

A comparable Sydney figure might be one for its greater metropolitan area rather than its LGA.

It would be helpful to reconfigure Brisbane data to look at the performance of a CBD centred NTE.

7. Capital City Centred LGA Core NTEs

Here in Section 7 we comment on each of the 6 Capital City LGAs in the study.

7.1 Adelaide City Council (SA)

In Table 14 below we see the following critical points

- The Adelaide Core NTE economy has increased in the six years at the same rate as inflation[29] (Our headline inflation figure for the six years is 13%)
- The $124 million revenue increase comes across all sub sectors
- The largest increases are in Food led businesses followed by Entertainment
- Creative and performing arts stands out since it represents $29 million of the total increase.
- Liquor retailing has shown no increase
- On the other hand Pubs and Taverns have increased by $15.3 million or 8.4%
- Hospitality Clubs has increased by a further $6 million
- Overall the Drinks sub sector revenue has increased by 7.1% which is a reduction in inflation adjusted terms.

Perhaps the most interesting figures are the changes in Entertainment led revenue and a steady growth in food led revenue. In the all Australian total % change on the right of the table the Entertainment sub sector has declined from 30.3% to 26.9% of all Core NTE.

Adelaide figures head in a more positive direction with a 21% increase.

In the Food sub sector Cafes and Restaurants have produced a solid performance whilst takeaway has not changed. This is well below the rate of inflation and the all Australian figure which stands at 22.8%. Does this represent opportunity for Adelaide or is there something peculiar to the Adelaide market which explains the lack of growth in takeaway food?

There is a strong performance in the Entertainment sub sector led by the 50% increase in Creative and performing arts. Gambling appears to be treading water but what of internet gambling? It may merit investigating whether this very small increase is due to the movement to online betting or to other factors.

Table 14 Revenue Change in the Adelaide Core NTE 2009 – 2014 ($'000,000)

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	$31.9	$31.7	-$0.2	-0.5%	3.4%	3.0%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$182.5	$197.8	$15.3	8.4%	19.2%	18.4%	11.0%	9.8%
Drink Total			**$214.4**	**$229.5**	**$15.2**	**7.1%**	**22.6%**	**21.4%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$15.9	$22.0	$6.0	38.0%	1.7%	2.0%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$58.4	$87.6	$29.2	50.0%	6.2%	8.2%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$23.3	$26.1	$2.8	12.0%	2.5%	2.4%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$2.3	$0.0	-$2.3	-100.0%	0.2%	0.0%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$2.2	$2.5	$0.3	12.2%	0.2%	0.2%	3.1%	2.7%
	920	Gambling Activities	$87.4	$92.2	$4.9	5.6%	9.2%	8.6%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$2.0	$2.6	$0.6	28.4%	0.2%	0.2%	0.2%	0.2%
Entertainment Total			**$191.5**	**$233.0**	**$41.5**	**21.6%**	**20.2%**	**21.7%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$421.0	$489.7	$68.6	16.3%	44.4%	45.6%	32.7%	35.0%
	4512	Takeaway Food Services	$122.0	$121.2	-$0.9	-0.7%	12.9%	11.3%	20.4%	22.8%
Food Total			**$543.1**	**$610.8**	**$67.8**	**12.5%**	**57.2%**	**56.9%**	**53.1%**	**57.8%**
Core Total			**$949.0**	**$1073.4**	**$124.4**	**13.1%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9a, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohorts

[29] Our headline inflation rate is taken from Bank of Australia figures

7.2 City of Darwin (NT)

The Darwin Core NTE has increased in sales revenue by 10.7% in this six year period. This is a slightly less than an inflation matching performance in revenue terms.

The Entertainment sub sector has declined from $228million to $195 million.

This is a loss of $33 million or 14.6% in the time period.

The decline in Entertainment is highlighted by a decline in the creative sub sector of nearly $6 million.

The best news in the Darwin figures is a $68 million increase in the food led sub sector. This increases Food to 52% of all NTE sales revenue from a prior total of 42%. This is closer to Australian average of 58% but still has to go some way to reach average Australian performance.

Table 15 Revenue Change in the Darwin Core NTE 2009 – 2014 ($'000,000)

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	$9.2	$10.7	$1.5	16.2%	2.0%	2.1%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$28.7	$40.5	$11.8	41.1%	6.2%	7.9%	11.0%	9.8%
Drink Total			**$37.9**	**$51.1**	**$13.3**	**35.1%**	**8.2%**	**10.0%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$13.8	$12.1	-$1.7	-12.6%	3.0%	2.4%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$65.0	$59.3	-$5.7	-8.8%	14.1%	11.6%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$19.4	$15.0	-$4.4	-22.9%	4.2%	2.9%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$8.6	$6.8	-$1.9	-21.5%	1.9%	1.3%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$3.7	$2.4	-$1.2	-33.7%	0.8%	0.5%	3.1%	2.7%
	920	Gambling Activities	$115.7	$97.3	-$18.4	-15.9%	25.0%	19.0%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$2.3	$2.4	$0.1	4.8%	0.5%	0.5%	0.2%	0.2%
Entertainment Total			**$228.5**	**$195.2**	**-$33.3**	**-14.6%**	**49.4%**	**38.1%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$100.7	$147.1	$46.3	46.0%	21.8%	28.7%	32.7%	35.0%
	4512	Takeaway Food Services	$95.5	$118.7	$23.2	24.2%	20.7%	23.2%	20.4%	22.8%
Food Total			**$196.3**	**$265.8**	**$69.5**	**35.4%**	**42.4%**	**51.9%**	**53.1%**	**57.8%**
Core Total			**$462.6**	**$512.1**	**$49.4**	**10.7%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9d, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohorts

7.3 City of Hobart (TAS)

The headline change in revenue percentage in Hobart is on or about the rate of inflation.

Within that picture we find another Core NTE where there is improvement in the Food sub segment and in Entertainment led businesses.

Improvement is 18.4% and 16.6%% respectively which is above change that could be due to inflation.

The overall sales revenue increase in Hobart is reduced by the decline in its Drinks led business activities.

This is pronounced at 37% in liquor retailing but we need to be careful about simply using percentages to explain or discuss change. In monetary terms this loss converts to a movement from $12.8 million to $8 million which is still a large decline. Part of this may be due to gains through sales in food multiples.

Further investigation should be considered as to whether this level of decline over the last six years is correct. There has been a $3 million increase in Club revenues in the same period.

This also contributes to any explanation.

A full explanation would depend upon understanding the extent that liquor retail purchasing habits have changed and especially movement into multiple retail distribution.

Table 16 Change in the Hobart Core NTE 2009 – 2014 ($'000,000)

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	% Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	$12.8	$8.0	-$4.8	-37.8%	2.3%	1.3%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$97.7	$95.2	-$2.5	-2.6%	17.7%	15.3%	11.0%	9.8%
Drink Total			**$110.6**	**$103.2**	**-$7.4**	**-6.6%**	**20.1%**	**16.6%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$13.6	$16.9	$3.2	23.8%	2.5%	2.7%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$97.4	$110.5	$13.1	13.4%	17.7%	17.8%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$13.9	$17.6	$3.7	26.7%	2.5%	2.8%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$2.6	$3.0	$0.5	18.5%	0.5%	0.5%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$2.2	$2.8	$0.6	26.5%	0.4%	0.5%	3.1%	2.7%
	920	Gambling Activities	$24.4	$28.9	$4.5	18.5%	4.4%	4.7%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	*	$0.0	*	*	*	0.0%	0.2%	0.2%
Entertainment Total			**$154.1**	**$179.7**	**$25.6**	**16.6%**	**28.0%**	**28.9%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$217.0	$266.4	$49.4	22.8%	39.4%	42.8%	32.7%	35.0%
	4512	Takeaway Food Services	$69.2	$72.6	$3.4	4.9%	12.6%	11.7%	20.4%	22.8%
Food Total			**$286.2**	**$339.0**	**$52.8**	**18.4%**	**52.0%**	**54.5%**	**53.1%**	**57.8%**
Core Total			**$550.9**	**$621.9**	**$71.0**	**12.9%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9h, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohorts

7.4 City of Melbourne (VIC)

Melbourne LGA is an outstanding performing local Core NTE geography.

Its strength is best understood if we consider that Port Phillip, analysed here as a distinct NTE is also in close proximity to the Melbourne LGA and together with other connected parts of the City the CBD ranges out into a much larger NTE cluster than the one reflected in the table below.

There is a case for review of how the Melbourne LGA NTE is measured as a local geography.

That is to say that examining both more local precinct nodes within the LGA and the wider connecting LGAs would tell a more helpful story of the scale and scope for development.

The consultants found this type of challenge essential to address to understand both the economic and social dynamics of the City of Westminster in a recent cost and benefits analysis[30]. If the intention might be that stakeholders would address both sides of the costs and benefits equation to unlock more sustainable support to grow the NTE then the detail in these figures needs to be broken down further.

Our experience is that costs and benefits do have a relationship but they are driven by more specific factors in distinctly smaller areas than the entire Melbourne LGA.

As in previous studies the performance of Melbourne in this type of analysis stands out. It is not simply a large Core NTE but one that sustains a reputation for leisure services across a wide range of activities,

Yet again in this study it emerges as the Core NTE with the standout leading Food led sub segment.

In 2014 sub segment sales are measured at $ 1.692 billion.

[30] T.Bevan, P Hadfield, A License, A Rowell – the Costs and Benefits of the City of Westminster ENTE - 2014

Sydney is slightly larger in size with a food sub-segment of $1.880 billion. This is a smaller % of its overall Core NTE and it has not grown as quickly. ($422 million whilst Melbourne increase is $524 million).

There is a decline in the Melbourne Drinks led sub segment from 15.7% to 13.1% of all Core NTE sales.

The sub segment which probably requires most thought is Entertainment as there is a recorded drop of $97 million in sales. The primary loss is in Creative and Performing Arts with a fall of $42.9 million.

Within the six year time frame this could include the movement of venues and people working in the sector across to other central locations and out of the LGA but only further enquiry augmented by local knowledge will establish this.

Entertainment Sub sector employment changes from 2009 to 2014 with reduction in Creative and Performing Arts through a loss of 363 jobs. This may be displacements to other parts of the City.

We note that Gambling has declined by $32 million and Sports and Recreation by $14 million.

Within the Food sub segment Takeaway services have increased substantially by $99 million.

Table 17 Revenue Change in the Melbourne Core NTE 2009 – 2014 ($'000,000)

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	$73.3	$90.3	$16.9	23.1%	3.2%	3.3%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$286.9	$265.0	-$21.9	-7.6%	12.5%	9.7%	11.0%	9.8%
Drink Total			**$360.2**	**$355.3**	**-$4.9**	**-1.4%**	**15.7%**	**13.1%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$39.4	$36.3	-$3.2	-8.0%	1.7%	1.3%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$338.8	$295.9	-$42.9	-12.7%	14.7%	10.9%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$70.7	$56.8	-$13.9	-19.7%	3.1%	2.1%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$8.7	$7.7	-$1.0	-11.4%	0.4%	0.3%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$5.9	$6.1	$0.1	2.4%	0.3%	0.2%	3.1%	2.7%
	920	Gambling Activities	$298.2	$266.3	-$31.9	-10.7%	13.0%	9.8%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$9.1	$4.7	-$4.4	-48.1%	0.4%	0.2%	0.2%	0.2%
Entertainment Total			**$770.7**	**$673.6**	**-$97.1**	**-12.6%**	**33.5%**	**24.8%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$945.4	$1370.3	$424.9	44.9%	41.1%	50.4%	32.7%	35.0%
	4512	Takeaway Food Services	$222.7	$322.0	$99.4	44.6%	9.7%	11.8%	20.4%	22.8%
Food Total			**$1168.0**	**$1692.4**	**$524.3**	**44.9%**	**50.8%**	**62.2%**	**53.1%**	**57.8%**
Core Total			**$2299.0**	**$2721.2**	**$422.3**	**18.4%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9i, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohorts

7.5 City of Perth (WA)

The overall revenue change level in Perth for this 6 year period may suggest a wider economy in difficulty which is reflected in the performance of the Core NTE in the CBD.

Perth LGA NTE shows a 1.2% increase in its overall level of Core NTE sales.

In some respects the pattern is more simply explained if we remove Entertainment from the equation as Food led sales increase by 15.4% and Drinks by 10.2%.

But these are not high increases in dollar revenues over a six year period. The loss in the entertainment revenue is reported at $89 million with decline from $257 million to $168 million.

Our feeling is that this must be partly due to a geographic location or corporate ownership issue in the ABS data since, for example, Perth Arena is not in the figures and therefore they would be understated.

The Perth LGA is a small central geography within Perth and this may partly explain any concern about data accuracy. Part of the Perth CBD Core NTE which was previously reported in CBD figures may be transposed to other adjacent local geographies. This should be verified by local initiative.

Table 18 Revenue Change in the Perth Core NTE 2009 – 2014 ($'000,000)

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	% Change	% Core NTE 2009	2014	% Core NTE Australia 2009	2014
Drink	4123	Liquor Retailing	$38.9	$38.1	-$0.8	-2.0%	4.0%	3.9%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$131.5	$149.8	$18.2	13.9%	13.5%	15.2%	11.0%	9.8%
Drink Total			**$170.4**	**$187.8**	**$17.4**	**10.2%**	**17.5%**	**19.0%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$23.3	$16.0	-$7.3	-31.5%	2.4%	1.6%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$94.9	$59.2	-$35.7	-37.6%	9.7%	6.0%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$30.1	$26.5	-$3.6	-11.9%	3.1%	2.7%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$3.2	$0.0	-$3.2	-100.0%	0.3%	0.0%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$2.7	$2.2	-$0.6	-20.4%	0.3%	0.2%	3.1%	2.7%
	920	Gambling Activities	$100.6	$62.1	-$38.5	-38.3%	10.3%	6.3%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$2.7	$1.6	-$1.1	-41.8%	0.3%	0.2%	0.2%	0.2%
Entertainment Total			**$257.5**	**$167.5**	**-$89.9**	**-34.9%**	**26.4%**	**17.0%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$428.2	$490.6	$62.4	14.6%	43.9%	49.7%	32.7%	35.0%
	4512	Takeaway Food Services	$120.1	$142.0	$21.9	18.2%	12.3%	14.4%	20.4%	22.8%
Food Total			**$548.3**	**$632.6**	**$84.3**	**15.4%**	**56.2%**	**64.0%**	**53.1%**	**57.8%**
Core Total			**$976.2**	**$988.0**	**$11.8**	**1.2%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9i, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohorts

Perth management believes that there is something unrepresentative about the Entertainment figures.

Displacement or lack of recognition of local economic activity because figures are hidden in corporate HQ data is the most likely explanation but beneath this bigger picture we still notice decline in firm and employment numbers on a like for like comparison over the six years.

The employment data on the Perth Core NTE supports the idea that the Entertainment sub segment has experienced a large loss of employment since 2009 but we do not believe that the loss is as great as this and will discuss the confusion that this may cause with the ABS.

There is evidence here of a flat lining economy and one which is performing at least to average Australian levels in what has been a tough period for the State economy.

We feel that there is something odd in the data which includes the decreases in Gambling and Racing as well as Creative Arts. Nevertheless if one switches to the establishment data it is clear that that there has been no growth in entertainment as its firm base has reduced across the entire sub category of ANZSICs.

7.6 City of Sydney (NSW)

If for the reasons already given we leave aside the NTEs of LGA Brisbane and Gold Coast then Sydney LGA is the largest and in fact the optimal geography for beginning to examine the economic performance of concentrated grouping of Core NTE business activities and their impact on society.

Sydney operates its strategy for the Night Time Economy under its evolving Open Sydney 2030 plan.

There is evidence of the success of this plan in the introduction of a smaller more effectively managed type of bar (the small bars programme) and the support that the LGA has given to creative businesses and to mobile food businesses is reflected in the economic performance in these figures.

Although the revenue table below does not highlight these figures we know from the analysis of firm change that the numbers of pubs, taverns and bars has increased from 310 to 434 outlets in the six year time frame. The increase coincides with the new small bars strategy and the reduction in average firm employment size in the drinks data indicates that the additional firms must be smaller ones.

Although the number of creative firms has reduced from 447 to 423 creative business revenue has grown by 13.5%. The increase is the largest increase in the entertainment led sub sector. This performance contrasts with most other cities in the study where Core NTE Entertainment has struggled.

In the measured period Core NTE employment has increased from 28,346 people to 31,871 employees.

For the first time in these new figures we see the small bars and creative programmes as a cornerstone of economic growth in the Sydney LGA which justifies the policies of Sydney 2030.

Drinks led outlet sales have increased by over 35% in this period and together with retail liquor sales result in the drinks sub sector being 17.9% of total Core NTE sales compared with the national average of 15.3% for 2014. This growth is driven through the small bars programme and not by expansion in larger outlets which are more challenging to regulate and control.

Similarly small creative firms and food outlets have contributed to total revenue sales which keep Sydney on the top of the Australian league table of Core NTE economic performance.

Table 19 Revenue Change in Sydney LGA Core NTE 2009 – 2014 ($'000,000)

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	$118.5	$189.9	$71.4	60.2%	4.2%	5.4%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$326.6	$441.2	$114.6	35.1%	11.5%	12.5%	11.0%	9.8%
Drink Total			**$445.1**	**$631.1**	**$186.0**	**41.8%**	**15.7%**	**17.9%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$69.7	$62.3	-$7.4	-10.6%	2.5%	1.8%	5.7%	6.1%
	551	Motion Picture and Video Activities *	$87.5	$95.5	$8.0	9.1%	3.1%	2.7%	*	*
	900	Creative & Performing Arts Activities	$331.3	$376.0	$44.6	13.5%	11.7%	10.7%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$114.4	$117.2	$2.8	2.5%	4.0%	3.3%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$5.7	$5.7	$0.0	-0.7%	0.2%	0.2%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$3.8	$3.7	-$0.1	-3.2%	0.1%	0.1%	3.1%	2.7%
	920	Gambling Activities	$309.4	$328.1	$18.7	6.0%	10.9%	9.3%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$17.7	$25.7	$8.0	45.1%	0.6%	0.7%	0.2%	0.2%
Entertainment Total			**$939.7**	**$1014.2**	**$74.5**	**7.9%**	**33.1%**	**28.8%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$1192.9	$1600.0	$407.1	34.1%	42.0%	45.4%	32.7%	35.0%
	4512	Takeaway Food Services	$265.1	$280.8	$15.6	5.9%	9.3%	8.0%	20.4%	22.8%
Food Total			**$1458.1**	**$1880.8**	**$422.7**	**29.0%**	**51.3%**	**53.3%**	**53.1%**	**57.8%**
Core Total			**$2842.8**	**$3526.1**	**$683.2**	**24.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9i, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohort

The overall Core NTE sales revenue performance of Sydney shows an increase of 24% in the period or $683 million. This is the highest in the studied geographies except for Brisbane which should not be compared with other centres.

8. Non Capital NTE Centre LGAs

8.1 Byron Shire Council (NSW)

Byron Shire is one of the smallest Core NTE centres in this study but it shows substantial growth in its drinks and food sub segments of c27% and 37% respectively. This is in a shorter time period from 2012.

With Frankston and Gold Coast any interpretation of the level of growth must be compared against different inflation figures since the analysis only covers 3 years.

Reserve Bank of Australia figures suggest that in the 2012-14 time period a total inflation increase of c7% provides a useful reference point rather than the 13% which is applied more widely in this study.

By such a comparison Byron has seen growth in its Core NTE which is as high as any in the study with growth in sales revenue at a measured 14.3%.

Sharing the reasons behind this growth would add to the body of evidence which we need to understand and interpret how economic growth may play a role in funding the costs of NTE management.

As with many other locations in this study Byron Shire has lost ground in its entertainment led activities.

Studying change in its total firm base gives no clue to the reasons for losses in entertainment revenue. The small firm base reduction from 128 to 124 businesses would not explain the trend.

The lower performance is spread across all categories of Entertainment led activity which again is different from most LGAs in the study where there are swings and roundabouts in the ANZSIC activities.

Without the benefit of deeper investigation into spending patterns and origins of contributions this suggests a tightening of the belt in leisure spending but it is not matched in food and drink led activities.

Food led activities have risen to 59.3% of all Core NTE spend compared to 57.8% for all Australia.

Drink led sales revenue is well below the all Australian average at 8.3% of all sales compared to 15.3%

The proportion of spend on Entertainment led activities remains higher than Australia at 32.4% but the key statistic is the fall from 43.2%.

Table 20 Revenue Change in the Byron Shire Core NTE 2012 – 2014 ($’000,000)

					2012 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	**ANZSIC**	**Description**	**2012**	**2014**	**Change**	**% Change**	**2012**	**2014**	**2012**	**2014**
Drink	4123	Liquor Retailing	$12.1	$15.4	$3.3	27.6%	3.3%	3.7%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$15.1	$19.1	$3.9	25.9%	4.2%	4.6%	10.4%	9.8%
Drink Total			**$27.2**	**$34.5**	**$7.3**	**26.7%**	**7.5%**	**8.3%**	**16.0%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$46.3	$42.6	-$3.8	-8.1%	12.7%	10.2%	5.9%	6.1%
	900	Creative & Performing Arts Activities	$28.0	$22.9	-$5.0	-18.0%	7.7%	5.5%	5.5%	4.7%
	911	Sports & Physical Recreation Activities	$54.3	$48.1	-$6.2	-11.3%	14.9%	11.6%	10.4%	9.3%
	912	Horse & Dog Racing Activities	$0.8	$0.0	-$0.8	-100.0%	0.2%	0.0%	1.5%	1.7%
	913	Amusement & Other Recreation Activities	$23.9	$20.6	-$3.3	-13.7%	6.6%	5.0%	2.6%	2.7%
	920	Gambling Activities	$3.8	$0.7	-$3.1	-82.3%	1.0%	0.2%	2.6%	2.2%
	9534	Brothel Keeping & Prostitution	$0.0	$0.0	$0.0	-	0.0%	0.0%	0.2%	0.2%
Entertainment Total			**$157.0**	**$134.9**	**-$22.1**	**-14.1%**	**43.2%**	**32.4%**	**28.8%**	**26.9%**
Food	4511	Cafes and Restaurants	$132.0	$182.3	$50.3	38.1%	36.3%	43.8%	33.3%	35.0%
	4512	Takeaway Food Services	$47.4	$64.1	$16.7	35.3%	13.0%	15.4%	22.0%	22.8%
Food Total			**$179.4**	**$246.4**	**$67.0**	**37.4%**	**49.3%**	**59.3%**	**55.3%**	**57.8%**
Core Total			**$363.7**	**$415.8**	**$52.1**	**14.3%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9i, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohorts

8.2 Newcastle City Council (NSW)

The Newcastle Core NTE figures provide one of the strongest set of numbers outside the major CBD centres. Overall revenue has increased by 18.4% which is exceeded only by Brisbane, Sydney and Port Phillip. This has come about with no increase in the Drinks led sub sector which is down to 14.5% of all sales and below the Australian average of 15.3%.

Change in Newcastle is driven by change in food led revenues which have increased by $219 million in the six year period and has seen its food led share of the Core NTE part of the economy grow from 37% to 49.9%. In context this is the largest % increase in food revenue after Melbourne and Port Phillip.

Within the detail of the Entertainment led section we see strong increases in

- Amusement and Recreation
- Sports and Physical Recreation

And decline in Clubs, Creative and Performing Arts and Gambling.

These are large changes within the Core NTE and result in negative overall change in Entertainment

We would be interested to have the views of the Council about these figures.

The decline in Clubs results from a decline in the number of outlets from 51 to 36 whilst the fall in Creative revenue is partly reflected in a decline in establishments from 126 to 118.

Table 21 Revenue Change in the Newcastle Core NTE 2009 – 2014 ($'000,000)

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	$41.3	$41.9	$0.5	1.3%	4.1%	3.5%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$132.0	$131.1	-$0.8	-0.6%	13.1%	11.0%	11.0%	9.8%
Drink Total			**$173.3**	**$173.0**	**-$0.3**	**-0.2%**	**17.1%**	**14.5%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$66.4	$51.5	-$15.0	-22.5%	6.6%	4.3%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$200.7	$192.8	-$7.9	-3.9%	19.9%	16.1%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$52.9	$68.6	$15.7	29.7%	5.2%	5.7%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$15.9	$15.1	-$0.8	-5.0%	1.6%	1.3%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$7.2	$8.7	$1.5	20.1%	0.7%	0.7%	3.1%	2.7%
	920	Gambling Activities	$111.4	$84.8	-$26.6	-23.8%	11.0%	7.1%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$4.6	$4.8	$0.2	4.4%	0.5%	0.4%	0.2%	0.2%
Entertainment Total			**$459.2**	**$426.3**	**-$32.8**	**-7.2%**	**45.4%**	**35.6%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$249.8	$382.1	$132.3	53.0%	24.7%	31.9%	32.7%	35.0%
	4512	Takeaway Food Services	$128.6	$214.9	$86.3	67.1%	12.7%	18.0%	20.4%	22.8%
Food Total			**$378.3**	**$597.0**	**$218.7**	**57.8%**	**37.4%**	**49.9%**	**53.1%**	**57.8%**
Core Total			**$1010.8**	**$1196.3**	**$185.5**	**18.4%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9i, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohorts

8.3 Parramatta City Council (NSW)

The changes in Parramatta revenues over this six year period indicate that it has kept pace with inflation but within the details there are some clear changes in dynamics.

Food led businesses have grown from 52.8% of the Core NTE economy to 65% which is well above the 2014 federal average of 57.8% and much higher than Sydney LGA largely because the Sydney Core NTE is a more diversified NTE economy.

It is this increase in food revenues that sustain the local NTE since with this performance it still only manages to keep pace overall with inflationary change.

Revenues in Drinks led businesses have declined by c$20 million.

This is reflected in the changes in retail liquor establishments which have declined from 25 to 17 outlets.

Overall revenues in Entertainment led businesses have declined by c$38 million.

These show a similar pattern to Newcastle but the gains are smaller and the losses therefore not outweighed. The largest decline is in Creative and Performing Arts at $36 million.

There has been a loss of firm numbers from 127 to 97 in creative establishments.

Within the Food sub sector the largest increase is in Takeaway food.

It is the largest increase in activity revenue across all the figures at $62 million and its takeaway activities now account for 7% of all Core NTE sales.

To put this in perspective the Parramatta takeaway sales revenue is 73% of the sales revenue from takeaway in Sydney LGA and if it was matched across all activities Parramatta would be three times as large as it is measured to be in 2014. Therefore it is an unusual feature of the economy.

In spite of this it is relevant to note that at 24% of all sales this is not dramatically higher than the Australian average percentage for takeaway which is 22.8% of all Core NTE.

Table 22 Revenue Change in the Parramatta Core NTE 2009 – 2014 ($'000,000)

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	$47.1	$38.2	-$8.9	-18.9%	6.2%	4.5%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$28.3	$17.4	-$11.0	-38.7%	3.7%	2.0%	11.0%	9.8%
Drink Total			**$75.4**	**$55.6**	**-$19.8**	**-26.3%**	**10.0%**	**6.5%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$21.4	$16.1	-$5.2	-24.5%	2.8%	1.9%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$132.7	$96.8	-$35.8	-27.0%	17.5%	11.3%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$29.8	$20.9	-$8.8	-29.7%	3.9%	2.4%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$11.1	$6.3	-$4.8	-43.1%	1.5%	0.7%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$2.0	$2.6	$0.6	27.2%	0.3%	0.3%	3.1%	2.7%
	920	Gambling Activities	$79.7	$95.2	$15.5	19.5%	10.5%	11.1%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$5.4	$5.3	-$0.1	-1.8%	0.7%	0.6%	0.2%	0.2%
Entertainment Total			**$282.0**	**$243.3**	**-$38.7**	**-13.7%**	**37.2%**	**28.4%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$255.9	$352.4	$96.5	37.7%	33.8%	41.1%	32.7%	35.0%
	4512	Takeaway Food Services	$143.9	$206.2	$62.3	43.3%	19.0%	24.0%	20.4%	22.8%
Food Total			**$399.7**	**$558.6**	**$158.8**	**39.7%**	**52.8%**	**65.1%**	**53.1%**	**57.8%**
Core Total			**$757.2**	**$857.5**	**$100.3**	**13.2%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9i, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohorts

8.4 City of Port Philip (VIC)

Port Phillip is one of the standout performances noted in this report.

The level of performance is underlined by the overall increase in Core NTE revenue in the period of 23.9%. Its revenue increase is similar to Brisbane and Sydney.

Most of the change in revenue performance comes from the food sub sector which will have connections with the Melbourne LGA food sector via skills transfer, ownership, competition and demand.

Food sales have increased in Port Phillip by $207 million which, Melbourne and Sydney aside, is only exceeded by Newcastle at $219 million in the same period.

This is a 46% increase. In the same period Sydney LGA Food led Core NTE increased by 29%.

Only Melbourne LGA tops out these increases at $524 million and 44.9%.

Port Phillip has also seen positive increase in Entertainment led revenues - $53 million.

The detail of the entertainment figures merits consideration to understand the range of changes that are taking place and the linkage with Melbourne LGA.

The increase in Gambling is again against a trend seen in most places. There has been a slight reduction in gambling establishments from 21 to 19.

There is a decline in the drinks led sub sector in both ANZSICs. This trend in liquor retailing is evident across several locations. Brisbane, Melbourne, Sydney and Darwin are examples of change in the opposite direction. This change merits wider investigation. It may be due to the movement of 'bottle shop' sales into super market chains.

Table 23 Revenue Change in the Port Philip Core NTE 2009 – 2014 ($'000,000)

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	2009 - 2014 % Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	$55.9	$51.9	-$4.0	-7.2%	5.4%	4.1%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$116.6	$106.5	-$10.1	-8.7%	11.3%	8.3%	11.0%	9.8%
Drink Total			**$172.6**	**$158.4**	**-$14.1**	**-8.2%**	**16.7%**	**12.4%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$3.8	$4.0	$0.2	6.2%	0.4%	0.3%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$259.0	$289.0	$30.0	11.6%	25.1%	22.6%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$33.7	$42.1	$8.4	24.9%	3.3%	3.3%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$3.6	$4.1	$0.5	13.1%	0.3%	0.3%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$3.9	$4.1	$0.2	5.1%	0.4%	0.3%	3.1%	2.7%
	920	Gambling Activities	$103.5	$115.7	$12.2	11.8%	10.0%	9.0%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$4.9	$6.6	$1.7	33.5%	0.5%	0.5%	0.2%	0.2%
Entertainment Total			**$412.4**	**$465.5**	**$53.1**	**12.9%**	**39.9%**	**36.4%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$338.4	$521.9	$183.6	54.3%	32.8%	40.8%	32.7%	35.0%
	4512	Takeaway Food Services	$109.1	$133.0	$23.9	21.9%	10.6%	10.4%	20.4%	22.8%
Food Total			**$447.4**	**$654.9**	**$207.5**	**46.4%**	**43.3%**	**51.2%**	**53.1%**	**57.8%**
Core Total			**$1032.4**	**$1278.9**	**$246.5**	**23.9%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9i, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends and adjusted 2011 cohorts

8.5 Frankston City Council (VIC)

As we can see neither Frankston nor Maroondah (which follows in commentary) are large NTE centres and the impact of being part of a larger metropolitan NTE service centre may explain this.

Nevertheless our experience in the study of NTE economies is that there is always a basic requirement for these services and that they can always contribute in helping a local economy to meet its potential.

Even where this may only be considered to have local community potential, the NTE has a role to play.

The overall decline of 10.9% in sales revenue recorded in this analysis for the Frankston NTE is perhaps the poorest set of figures in economic terms in the Core NTEs under study.

There may be reasons for this which Frankston can consider and use as part of a change strategy.

Perhaps the pull of the wider Melbourne metropolitan area leads to high levels of NTE expenditure by Frankston residents outside its geography. An analysis of travel to work dynamics would help a better understanding.

There was an increase in Frankston food led sales of 13% in the period in spite of a decline in takeaway food sales. The food segment is now 53.3% of all Core NTE sales but the percentage increase results from the decline in the other segments rather than as a simple result of expansion...

Entertainment revenues have declined by $38 million and whilst this comes from all activities the largest losses are in Creative and Performing Arts and in Sports and Recreation.

The Drink led sub sector has also declined from $20 million in 2012 to $13.1 million in 2014.

Frankston is the only location in the study where we find a decline in takeaway food revenue

Table 24 Revenue Change in the Frankston Core NTE 2012 – 2014 ($'000,000)

					2012 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	**ANZSIC**	**Description**	**2012**	**2014**	**Change**	**% Change**	**2012**	**2014**	**2012**	**2014**
Drink	4123	Liquor Retailing	$2.2	$3.4	$1.3	58.4%	*	1.1%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$17.7	$9.7	-$8.0	-45.3%	*	3.2%	10.4%	9.8%
Drink Total			**$19.9**	**$13.1**	**-$6.8**	**-34.0%**	*	**4.3%**	**16.0%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$38.7	$32.1	-$6.7	-17.2%	*	10.5%	5.9%	6.1%
	900	Creative & Performing Arts Activities	$28.6	$15.4	-$13.2	-46.1%	*	5.0%	5.5%	4.7%
	911	Sports & Physical Recreation Activities	$75.8	$63.2	-$12.7	-16.7%	*	20.6%	10.4%	9.3%
	912	Horse & Dog Racing Activities	$3.9	$3.2	-$0.7	-17.2%	*	1.0%	1.5%	1.7%
	913	Amusement & Other Recreation Activities	$4.5	$2.8	-$1.7	-37.9%	*	0.9%	2.6%	2.7%
	920	Gambling Activities	$10.2	$8.5	-$1.8	-17.2%	*	2.8%	2.6%	2.2%
	9534	Brothel Keeping & Prostitution	$5.9	$4.9	-$1.0	-17.2%	*	1.6%	0.2%	0.2%
Entertainment Total			**$167.6**	**$130.0**	**-$37.6**	**-22.5%**	*	**42.4%**	**28.8%**	**26.9%**
Food	4511	Cafes and Restaurants	$83.3	$94.1	$10.8	13.0%	*	30.7%	33.3%	35.0%
	4512	Takeaway Food Services	$73.4	$69.5	-$3.9	-5.3%	*	22.7%	22.0%	22.8%
Food Total			**$156.7**	**$163.6**	**$6.9**	**4.4%**	*	**53.3%**	**55.3%**	**57.8%**
Core Total			**$344.2**	**$306.7**	**-$37.5**	**-10.9%**	*	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9f, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends

8.6 Maroondah City Council (VIC)

Maroondah is the smallest Core LGA NTE centre that is measured in this study. Note that it has more NTE outlets than a similarly small location such as Byron Shire but the reasons that many of these establishments exist will be very different.

Byron Shire derives a higher level of overall economic activity from its establishments and yet it has 20 less food based establishments than Maroondah.

The key reasons must surely surround the overall volume of non-resident users of Byron Shire services.

But in addition to this the overall Maroondah Core NTE economy has performed poorly when related to inflationary change. Overall sales revenue change from 2009 to 2014 is measured at minus 0.8%.

There are declines everywhere save the food sub segment which balances out the losses of revenue elsewhere. The largest losses are in Creative and Performing Arts and Gambling.

Creative and Performing Arts establishments are measured as having declined from 59 to 46 outlets.

Table 25 Revenue Change in the Maroondah Core NTE 2009 – 2014 ($'000,000)

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	% Change	% Core NTE 2009	2014	% Core NTE Australia 2009	2014
Drink	4123	Liquor Retailing	$14.9	$11.9	-$3.0	-19.9%	5.4%	4.4%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$14.9	$13.7	-$1.2	-7.9%	5.4%	5.1%	11.0%	9.8%
Drink Total			**$29.8**	**$25.6**	**-$4.1**	**-13.9%**	**10.9%**	**9.4%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$6.0	$3.9	-$2.1	-35.2%	2.2%	1.4%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$64.4	$43.7	-$20.7	-32.2%	23.5%	16.1%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$20.1	$11.3	-$8.8	-43.8%	7.3%	4.2%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$2.1	$7.0	$4.9	234.8%	0.8%	2.6%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$1.6	$0.9	-$0.7	-44.6%	0.6%	0.3%	3.1%	2.7%
	920	Gambling Activities	$40.3	$28.8	-$11.5	-28.5%	14.7%	10.6%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$1.8	$1.2	-$0.6	-31.9%	0.7%	0.5%	0.2%	0.2%
Entertainment Total			**$136.3**	**$96.8**	**-$39.5**	**-29.0%**	**49.8%**	**35.7%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$64.4	$94.2	$29.7	46.1%	23.6%	34.7%	32.7%	35.0%
	4512	Takeaway Food Services	$43.1	$54.8	$11.7	27.1%	15.7%	20.2%	20.4%	22.8%
Food Total			**$107.5**	**$148.9**	**$41.4**	**38.5%**	**39.3%**	**54.9%**	**53.1%**	**57.8%**
Core Total			**$273.6**	**$271.4**	**-$2.2**	**-0.8%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9i, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends with adjusted 2011 cohorts

9. Non Comparative NTE LGAs

9.1 Gold Coast City Council (QLD)

As a large administrative geography we have placed the Gold Coast LGA commentary in Section 9.

Whilst the ABS figures are interesting they do not tell us much about NTE centres which lie within the Gold Coast and it would be more helpful to conduct a detailed breakdown analysis of the figures based upon identified local centres.

This can be achieved with the help of the client in deciding first of all what those locations should be so that we could then agree a geographic tabbing format with the ABS, perhaps using SA2 geography building blocks to explore places in more appropriate detail.

The overall change in Gold Coast sales revenue is not quite as great as the increase in measured federal inflation levels but because of the reasons stated above this will disguise local centre performance that will fall either side of the figure of 5.2%.

We may take these figures as higher level macroeconomic indicators of what may be happening in the Gold Coast and the overall increase in Pubs, taverns and Bars is such a figure.

With a 26.3% increase in revenue it is similar to Byron Shire but not as high as Darwin.

There is only a small loss in Creative and Performing Arts which again is unlike many places.

The increase in revenue from food outlets at $226 million is the primary explanation for any increase in the overall figures. But again its average of Food Outlet sales is slightly below the federal percentage of 57.3% Again we would find large variances in this if we were looking at more focussed centres.

Table 26 Revenue Change in the Gold Coast Core NTE 2012 – 2014 ($'000,000)

Sub-Sector	ANZSIC	Description	2012	2014	2012 - 2014 Change	2012 - 2014 % Change	% Core NTE 2012	% Core NTE 2014	% Core NTE Australia 2012	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	$27.2	$27.6	$0.4	1.5%	0.9%	0.9%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$158.6	$200.2	$41.6	26.3%	5.3%	6.4%	10.4%	9.8%
Drink Total			**$185.8**	**$227.8**	**$42.0**	**22.6%**	**6.2%**	**7.3%**	**16.0%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$235.3	$218.9	-$16.5	-7.0%	7.9%	7.0%	5.9%	6.1%
	900	Creative & Performing Arts Activities	$210.5	$188.4	-$22.0	-10.5%	7.1%	6.0%	5.5%	4.7%
	911	Sports & Physical Recreation Activities	$480.0	$457.4	-$22.6	-4.7%	16.1%	14.6%	10.4%	9.3%
	912	Horse & Dog Racing Activities	$66.3	$47.6	-$18.7	-28.2%	2.2%	1.5%	1.5%	1.7%
	913	Amusement & Other Recreation Activities	$98.1	$90.1	-$8.1	-8.2%	3.3%	2.9%	2.6%	2.7%
	920	Gambling Activities	$151.0	$133.3	-$17.7	-11.7%	5.1%	4.3%	2.6%	2.2%
	9534	Brothel Keeping & Prostitution	$11.2	$7.7	-$3.5	-31.0%	0.4%	0.2%	0.2%	0.2%
Entertainment Total			**$1252.3**	**$1143.3**	**-$109.0**	**-8.7%**	**42.0%**	**36.5%**	**28.8%**	**26.9%**
Food	4511	Cafes and Restaurants	$1096.3	$1287.5	$191.2	17.4%	36.8%	41.1%	33.3%	35.0%
	4512	Takeaway Food Services	$445.9	$477.3	$31.4	7.0%	15.0%	15.2%	22.0%	22.8%
Food Total			**$1542.2**	**$1764.8**	**$222.6**	**14.4%**	**51.7%**	**56.3%**	**55.3%**	**57.8%**
Core Total			**$2980.3**	**$3135.9**	**$155.6**	**5.2%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends

9.2 Brisbane City Council (QLD)

Some of the same overall considerations apply to Brisbane at to the Gold Coast.

The differences between a defined Brisbane CBD or central geography NTE and the figures for say, Melbourne, Adelaide, Perth, Hobart and Sydney LGAs would help us understand much more about the nature and potential and impact of the NTE in Brisbane and expand perspectives of NTE dynamics.

But we do not have those figures at the LGA level.

At the measured level we see a strong Core NTE economy with a sales revenue increase at least twice the rate of inflation at 25.2%.

This is an average across Brisbane and within the LGA the key nodes of NTE change producing this figure must be showing even higher rates of growth.

Clearly there are parts of Brisbane where the performance would be both better and worse than this and it terms of driving an improving NTE strategy the evidence for the CBD and other centre levels of performance is crucial.

It is possible that Brisbane has the most economically successful central NTE but we cannot verify this from figures that are analysed at this level of geography. It may be hiding its success.

Key points in the numbers below include

- Growth across all sub segments of the Core NTE
- A 6.3% increase in recorded drinks led sales
- 8.9% growth in Creative and Performing Arts revenues
- 16.0% growth in sports and recreation activities
- Decline in Gambling
- A major increase in food led activities

The increase in food led revenue activities is much greater than any other centre but there is no validity in comparison. The percentage increase from 54.8% to 61% takes it well above the Australian average performance.

Table 27 Revenue Change in the Brisbane Core NTE 2009 – 2014 ($'000,000)

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	**ANZSIC**	**Description**	**2009**	**2014**	**Change**	**% Change**	**2009**	**2014**	**2009**	**2014**
Drink	4123	Liquor Retailing	$45.4	$54.4	$8.9	19.7%	0.9%	0.9%	5.6%	5.5%
	4520	Pubs, Taverns and Bars	$372.0	$389.3	$17.4	4.7%	7.5%	6.2%	11.0%	9.8%
Drink Total			**$417.4**	**$443.7**	**$26.3**	**6.3%**	**8.4%**	**7.1%**	**16.6%**	**15.3%**
Entertainment	4530	Clubs (Hospitality)	$219.5	$233.6	$14.2	6.5%	4.4%	3.7%	5.7%	6.1%
	900	Creative & Performing Arts Activities	$287.2	$312.7	$25.5	8.9%	5.8%	5.0%	6.4%	4.7%
	911	Sports & Physical Recreation Activities	$580.8	$673.9	$93.1	16.0%	11.7%	10.8%	10.9%	9.3%
	912	Horse & Dog Racing Activities	$29.4	$27.4	-$2.0	-6.7%	0.6%	0.4%	2.0%	1.7%
	913	Amusement & Other Recreation Activities	$173.2	$206.8	$33.6	19.4%	3.5%	3.3%	3.1%	2.7%
	920	Gambling Activities	$529.5	$523.1	-$6.3	-1.2%	10.6%	8.4%	2.0%	2.2%
	9534	Brothel Keeping & Prostitution	$14.6	$10.8	-$3.7	-25.6%	0.3%	0.2%	0.2%	0.2%
Entertainment Total			**$1834.1**	**$1988.4**	**$154.3**	**8.4%**	**36.8%**	**31.9%**	**30.3%**	**26.9%**
Food	4511	Cafes and Restaurants	$1783.2	$2616.3	$833.1	46.7%	35.8%	42.0%	32.7%	35.0%
	4512	Takeaway Food Services	$943.2	$1182.9	$239.7	25.4%	18.9%	19.0%	20.4%	22.8%
Food Total			**$2726.4**	**$3799.2**	**$1072.8**	**39.4%**	**54.8%**	**61.0%**	**53.1%**	**57.8%**
Core Total			**$4977.9**	**$6231.3**	**$1253.5**	**25.2%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

9.3 Articulating Useful Comparison

As we see in the figures and the comments in the report there are limitations to useful comparison.

The limits partly result from the available data and the lack of geographic compatibility of the economic geographies that are under the microscope.

In principle more flexible use of geographic data is possible.

We suggest that it is very important that the major city NTEs be put on a more consistent comparative footing when examining the change and development of the revenue side of NTE measurement.

If this does not happen it is impossible to reasonably examine both the relativities of cost and benefit and aspects of funding costs to optimise NTE activity.

The final table in this report demonstrates the relative concentration of Core NTE businesses within differing Australian LGA boundaries. One sees immediately the difficulty in the Brisbane figure in that it displays no concentration of NTE activity whereas in places within the city there will be concentrations and higher revenues and pressures for required funds to address the costs that help to optimise the NTE experience. A concentration of 1 simply means that it is average compared to the rest of the Australian Core NTE economy. We know that within Brisbane there must be centres that are anything but average.

Table 28 LGA Core NTE Firm Concentration in 2014

Australian NTE in LGA	LGA	Core NTE	Total NTE	All other Firms	% All Other Firms in LGA	Total Firms	Core NTE Numerical Concentration
0.79%	Adelaide	767	2,067	13,228	0.70%	15,295	**1.13**
5.51%	Brisbane	5,334	20,172	94,804	5.50%	114,976	**1.00**
0.35%	Darwin	337	1,092	5,917	0.30%	7,009	**1.16**
0.50%	Hobart	480	1,515	5,100	0.30%	6,615	**1.65**
2.56%	Melbourne	2,480	6,589	30,081	1.70%	36,670	**1.51**
0.36%	Maroondah	345	1,409	8,254	0.50%	9,663	**0.71**
1.24%	Port Phillip	1,199	4,074	13,950	0.90%	18,024	**1.38**
0.79%	Perth	769	2,685	14,677	0.80%	17,362	**0.99**
4.36%	Sydney	4,221	12,364	30,315	2.00%	42,679	**2.18**
0.84%	Newcastle	817	2,657	11,087	0.70%	13,744	**1.21**
1.18%	Paramatta	1,142	4,135	19,594	1.10%	23,729	**1.07**
0.33%	Byron	315	1,176	4,623	0.30%	5,798	**1.09**
0.37%	Frankston	360	1,377	8,127	0.50%	9,503	**0.74**
2.96%	Gold Coast	2,860	9,779	48,488	2.80%	58,266	**1.06**
77.86%	*Rest of Australia*	*74,811*	*281,117*	*1,439,749*	*81.90%*	*1,720,866*	0.95
	Australia	**96,769**	**352,522**	**1,747,678**	**100%**	**2,100,200**	

Source: TBR Ref: W1/S4a, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends

This background data helps to facilitate sensible dialogue between all parties. Sydney at 2.18 x average concentration is seen to be the LGA with the highest concentration or clustering of Core NTE businesses within its boundaries.

This is followed by Hobart, Melbourne and Port Phillip. Two of the three LGAs highlighted in red have clear average concentrations of Core NTE firms – Maroondah and Frankston.

Maroondah and Frankston appear to be weak NTE centres. They may be capable of expansion but in both cases they sit within Greater Melbourne and local analysis may show that the central Melbourne NTE LGA competes to provide the market for services to its more outlying LGA partners.

Nevertheless both places should aspire to reach the average concentration of 1.00. The wider 'rest of Australia' figure factors in all rural areas and at 0.95, are more concentrated in firm numbers than them.

It is interesting that both centres are in the Melbourne Metropolitan area. Melbourne LGA will address the leisure needs of people who commute to work or travel on local and private transport into the city centre.

Perth shows a concentration of NTE firm average which is close to one. We are concerned about some aspects of the geographically aligned data in the Perth Entertainment figures which may mean that the concentration is under represented.

10. Key Subjects for NTE Debate

10.1 Core NTE Measurement

Measuring the NTE at a national level presents few problems because appropriate detail is adequate in the origin data set[31] and may be shared with little qualification.

The ABS will continue to make improvements to its data collection processes.

It plans a new time series of national business data from 2017 in respect of 2016 data.

Until we are able to review the possible impact of that time series we will continue to reflect how new information on establishments, employment and sales revenue delivers either increase or decrease in performance compared to prior year using the rules of the present time series.

As one moves to smaller local geographies issues of activity identification and change become more difficult to demonstrate and we recommend that unless and until local data can be provided in a more transparent way by the ABS that when local study of business statistics beyond the ABS capability is required that co-opting the engagement of the business community will help back up ABS generated numbers for critical evaluations or assessments.

Suitably geographically coded private sector information held by private sector financial information firms such as Dun & Bradstreet may also improve clarity.

10.2 Balancing the Benefits and Costs of the Core NTE

Studies in the UK and Australia establish that Core NTE activities deliver anything between 10 and 20 times benefit to cost ratios[32]. Costs in this case include services associated with direct and sub contracted local government services, hospital and ambulance services, policing and public transport.

Since most of Core NTE taxation does not go directly into a budgetary pot marked NTE Service Management this does not takes us very far. There does need to be focus on where the taxed or surcharged proceeds of NTE activity arrive because without both this identification and agreement of budgetary need there will continue to be unnecessary and unresolved friction between NTE stakeholders.

Recognition of the economic benefits of the NTE should result in policies that stimulate wider community use of NTE spaces and NTE economic development to be clearly embedded in local planning and economic development responsibilities but funding is the critical complication.

Healthy Core NTE growth will increase opportunity and enhance the tax base.

The cost impacts of NTE activity through the changing hours from 6 p.m. to 6 a.m. are different.

This is another aspect of information that it would be helpful to share. In other studies we have seen that the post-midnight revenue earning of the NTE is substantially lower whilst average costs are higher.

10.3 When do NTE businesses make Money?

[31] The ABS Data set

[32] Greater London Authority Study 2012 – Ratios of cost to benefit

There is almost no economic data on the subject of the hourly incidence of NTE receipts. Even though we base our figures for economic performance on an appropriate group of activities this still does not fully identify when the businesses in those activities are actually open and trading.

Recent research by the reporting consultants in the UK[33] suggests that 45% of NTE revenue may be received between the hours of 6 p.m. and midnight whilst 20% is collected from midnight to 6 a.m. and a further 25% from midday to 6 p.m.

The remaining 10% indicates that some 'NTE' businesses transact from 6 a.m. to midday.

This data was gathered by survey within a specific and unusually concentrated NTE geography[34] and we cannot say that this pattern would be repeated in other locations.

We can say that this is an aspect of information provision which needs to be improved.

In the UK we are studying the use of consumer panel surveys that provide information on both times of expenditure and type of expenditure.

Better information would greatly help in fashioning improved strategies.

Whilst Midnight is an arbitrary time point there is no doubt that the NTE changes character through the 24 hour cycle and it is most demanding on available services as it moves to and beyond Midnight.

In relation to service user levels it also tends to posts the highest levels of anti-social behaviour.

10.4 Night Time Shift Work

Night time work is not synonymous with NTE although Core NTE businesses play a key part in these employment figures. Shift and Night work in a variety of different services and manufacturing operations are an important aspect of the economy after dark.

In the UK total night time employment has been estimated as at least six times as large as what we refer to as the Core NTE[35]. This does not seem to be the case in Australia and leads to different circumstances and opportunities. The Working Time arrangements survey November 2012 on shift working patterns suggest that up to 1.8 million Australians work in shift patterns[36] but there are other occupation patterns which would require more examination in seeking to understand the role that people working NTE hours may play in night time economy strategies.

The levels of working people in the night time hours may have an important role in a safer NTE.

We do not know how current Core NTE businesses interlink with people who work through these hours who are not employed in the leisure economy but as the streets begin to empty of people seeking entertainment these night time employees can help offset the depopulation that contributes to the sense of an increasingly anti-social environment.

[33] Opening Times of businesses in the West End of London

[34] Westminster and West End

[35] UK Labour Force Survey – October 2013

[36] ABS Report – Working Time Arrangements – 6432.0 – November 2012 – published in May 2013.

10.5 Anti-Social Behaviour

It is clear that businesses providing alcohol as part of their services must have regard for the impact of excessive consumption amongst their clientele and on the public purse.

Currently this is addressed by a range of regulative measures.

In some parts of the world concerns have led to new legislation including early closure powers and the rights of Councils to impose specific taxes on outlets that operate after midnight[37].

The problem with such solutions is that they can be divisive as they may induce a wide sense of inappropriate penalty without stimulating any responsive engagement in causes and solutions.

Achieving change through collaboration would seem a better way to achieve objectives.

In the UK businesses may be exempted from this form of tax or levy if they are part of a qualifying Business Improvement District (BID) and for a range of other reasons. Nevertheless the legislation simply extends regulative powers and to many it appears as simply another tax or restriction on business.

The concept of the Business Improvement District does not have standard application throughout national economies where it has been adopted. BIDs have a mixed reputation but some of them contribute greatly to the key matters of concern in this subject field.

Clearly any outlet that is not operating to agreed standards must face the full force of the law.

10.6 Every Core NTE is different

Much of the bad press that hinders the development of NTE economies stems from incidents in a few highly concentrated urban areas. We see these clusters of economic activity in central parts of LGA Melbourne and Sydney but they can occur in any urban location and if they encroach on pre-existing residential neighbourhoods this may be detrimental to communities that live there 24/7.

Excessive NTE business clustering often links to exuberant groups of younger people. It is by no means a necessary consequence of NTE business service provision and yet it is often alleged that the fault lies at the door of the private sector.

High levels of employment in a small geography overlain with high volumes of tourists seeking to purchase available services lead to a variety of pressures on the management of spaces.

But there is no reason to see this as the default version of the NTE and there is no reason why a coordinated group of stakeholders should not pursue expansion in NTE services as long as they carefully consider all interests and the resources required to deliver positive outcomes.

In an atypical location (Down Town Manhattan) the following statement was made as long ago as 2003 by the then President of the New York Night Life Association - David Rabin.

"New York City is proudly known as the "Nightlife Capital of the World." It maintains this status because of its large and vibrant nightlife "industry," which continually reinvents itself.

[37] Late Night Levy – UK Licensing Laws

Every night of the year in New York City, trends are started, music is created, styles are established and people socialize with each other. Much of the influence of the City's nightlife industry is visible, and therefore known to the public at large.

However, the nightlife industry's economic impact, though much greater than that of other entertainment industries in New York, is often minimized and sometimes ignored."

These views led to funding the first ever economic measurement of a Night Time Economy[38].

It wasn't systematic and it depended upon the sort of modelling that we expect to pay large sums for and then not really understand but the outcome was the "$10 billion dollar New York Night Time Economy" that was variously described as the income from the NTE (which it was not) and the revenue generated by a black box which claimed to capture all supply impacts with revenue value (which it could not). But Mr. Rabin did stand up for the many creative and socially binding aspects of an NTE and for the rights of people to enjoy them

It is usual for centres of education to be co-located with NTE centres. So we may have tourists (whether domestic or international), employees of firms and students all increasing the activity density that would otherwise come from local residents.

In such concentrated areas there may be local residents either unsympathetic with the worst excesses of anti-social behaviour or with little sympathy for the cultural interests of this night time population. These differences of interest need reconciliation with local communities or the NTE is never to be optimised.

Business, the planner, the economic developer, the community worker and public services such as police and health should pass the test that they work as a team in a best practice agenda that delivers what David Rabin championed or the NTE will continue to irritate us all and not fulfil its potential.

Whilst the same guiding principles should be applied to smaller centres, scale increases the challenge.

Response can be reactive, public image satisfying and departmental with no overarching strategy.

NTEs can spring up in primarily residential areas where they need to be contained. A reputation for Anti-social Behaviour is not in the best interests of economic growth. These negative dynamics impact on the economy, on individuals and property it is important to note that these risks and incertitude inhibit market development.

NTEs should serve wide stakeholder interests because this tends to be beneficial to all parties.

Regular festivals that celebrate cities after dark, such as the 'Nuit Blanche' or "White Night", emphasise both cultural and community wide ownership and some of the lesser known pleasures of city spaces.

10.7 Challenges for NTE Economic Development

10.7.1 Gazelles –the growth firms of the future

The ABS data facilitates helpful economic measurement but it is not detailed enough to tell us much about the health of a range of businesses. It provides no essential statistics on relative rates of birth and death of firms or what particular activities have high 'churn[39]' levels of business activity.

[38] The 2003 study of New York Night Life

[39] Levels of business churn (births and deaths) in relation relative activity scale is a key indicator of economic health

Authorities such as Sydney LGA address some information gaps by way of property and occupancy census which run every five years[40]. This provides activity flagged and detailed levels of local business employment that can be cross referenced to the ABS data[41].

This 'census' is produced once every five years and only within the City of Sydney.

Zero employment establishments – start-ups on a small scale conducted outside commissioned business premises can represent up to 40% of total firm numbers. This is easily verifiable by reviewing cohort based percentages of all firms within a given economy. A statistical model of firms takes the form of a pyramid in which the broad bottom layer consists of 0 employing companies.

They are a key component of developing economic activity[42]. Bill Gates and Microsoft is a famous example of a zero employment firm.

Amongst these micro establishments will be some of the larger employing firms of the future and policy needs to constantly devise ways of connecting with them.

The purpose of engaging with 'micro' firm dynamics stems from the magnitude of the impact that they have on future economic growth[43].

As long ago as 1979, David Birch at MIT first verified that ALL net new employment growth originates in very small firms. Birch called these firms 'Gazelles'.

He saw the primary purpose of public sector economic development to be the encouragement and provision of environmental habitats which would attract such firms and he completely rejected the previous 'scattergun' or laissez faire approach to economic development.

Birch[44] was the 'Father of the SME '.

Public sector data has difficulty identifying these establishments. In Australia most of them begin and remain below GST threshold. It is not unusual for a creative person to run two or three 'businesses' side by side.

The possibility of using private sector data in Australia is limited for the time being.

Potential suppliers are unfamiliar with the context and do not systematically retain year on year transaction comparisons in their data bases.

A 21st century précis of Birch's seminal work concludes as follows

'In sum, an indirect approach to studying small business as the major generator of jobs is advised, in which the proposed next step is to analyse data on individual firms alongside the characteristics of the places where firms decide to locate'.

Birch had the benefit of the use of a USA private sector longitudinal database which is not available here.

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[40] FES – Floor Space and Employment Survey

[41] Melbourne LGA has a similar study which updates knowledge by business activity

[42] Wide ranging international research shows that '0' employee activities are not fully reflected in public data bases

[43] Microsoft began in a garage

[44] The Job Generation Process – 1979 – David Birch Massachusetts Institute of Technology

10.8 The NTE Profiler Tool

Our client brief requires us to compare the Night Time Economies of a group of Australian LGAs which are important to the NTE agenda.

This is possible up to a point. But as we have noted there is not much point in comparing some places through an economic measurement prism when there is little common basis for comparison.

The challenge to stimulate data improvement is important for all local economies.

In this report we have focussed local comparisons between places with similar dynamics such as Sydney and Melbourne or Port Phillip and Parramatta.

But they are still all places where comparison is useful only to some degree.

For example the Core NTE of Melbourne reaches across a number of inner city geographies whilst in Sydney the NTE is more concentrated (See Table 28 LGA Core NTE Firm Concentration in 2014).

Even in Sydney at the level of geographic detail applied here we are not going to understand the economic impact or benefit of Kings Cross as a core NTE location.

In the UK we have recently demonstrated the possibility to study both benefits and costs in very small NTE geographies. For example the WESA[45] geography in London's West End comprises only 4% of the geography of the City of Westminster and yet it holds over 22% of all Westminster NTE business activity.

It has been clearly shown to be the dynamic centre of all Core NTE activity within the City and therefore the primary centre of challenge as well as opportunity.

This forensic approach is the direction in which the study of NTE data should travel.

Facilitating local study requires a relevant approach to capture and examine data such that any LGA can step beyond the strait jacket of 'trend' report and focus on the detail in its own geography.

An authority will find it useful to make comparisons where it understands that similar challenges are faced and where perhaps differences in approach are to be seen.

There are also facets of NTE cost data which if captured within one format will eventually facilitate a level of useful information for local decision taking.

Costs and Benefits must eventually be set transparently side by side.

The movement of the Australian demand or benefit or Core NTE side analysis to the NTE Profiler Tool[46] will enable local bodies to begin to meaningfully focus on their own key NTE statistics which stretch beyond improved economic data into related fields of cost.

Tracking local costs side by side with local revenues should be the key long term purpose in the use of a Profiling Tool.

[45] West End Stress Area

[46] The NTE Profiling Tool has been shown in beta format to the client.

A final and fundamental point is that important as they may the places in this study only represent a small proportion of all the locations where Australia has significant Core NTE activity.

All such places can be captured together in a profiling tool.

11. Conclusions

This report is the third longitudinal analysis of the Australian NTE economy with specific reference to 14 LGAs including all key capital cities except Canberra.

The ACT data in the report shows that whilst it may be a relatively small national NTE contributor that its Core NTE is an important employer with over 25,000 people employed in the Core NTE in 2014.

The report is based upon the most comprehensive public sector data that is currently available.

That is not to say that the data specification cannot be improved but more forensic analysis would need to be justified to the ABS or other data sources used to improve the quality of local geography outputs.

For example it would be very helpful to have

- Firm data which is stratified into more banded employment cohorts. Firms with 0 employees; 1-19 employees; 20 employees and above are far too broad to understand the impacts of firm and employment growth and decline
- Information on annual firm birth and death rates is critical to understand how the components of economic change are working within and around the Core NTE sector
- Collocated activities within geographies that are hidden within headquarter based information brings its own inaccuracies to ABS data

11.1 Statistical Challenges

This work presented a number of challenges and primary amongst these were

- Comparing the data detail across so many different locations and geographic layers creates the risk that the numbers simply obscure the visibility of key messages to specific interests.
- We have tried to improve the way that we address this by simplifying the reporting.
- In this version whilst sub sector and relative local overall Core NTE performance have been calculated we have relied upon single revenue based ANZSIC activity tables as a proxy for discussing performance and change in each specific location and activity.
- Detailed Firm and employment tables are prepared but omitted from the report since we would otherwise introduce a further 28 tables and add to the complexity of what is being reviewed rather than enhance the clarity of messages.
- All these tables are contained in Section 14 Appendix C.

Our proposal to introduce a Profiling Tool template will end wading through data detail for a stakeholder group wishing to examine Core NTE economic drivers in a specific local geography.

- We have established a better basis of understanding with the ABS on future data provision
- There are further levels of engagement with the ABS that may improve useful data quality

This issue of data detail and the accurate colocation of that data within precise NTE concentrated geographies[47] are critical to effective strategic plans.

[47] Although not as forensic as we would like Australian Postal Code geographies work effectively

With clearer longitudinal information local strategy makers can visit existing and new challenges with the businesses and communities who are affected by them and help to provide solutions based upon realities rather than the subjective opinions which still tend to inhabit the subject of the Night Time Economy.

The Profiling Tool provides a platform to display the benefits of what the Core NTE contributes and commensurate with progress in data availability the costs may be added side by side into the tool.

11.2 Main Conclusions

The Core NTE is a substantial part of the Australian economy.

It directly employs over one million Australians out of 11 million at work.

Our 2014 $108 billion estimate of sales revenue can be regarded as a benefit to the economy in a variety of ways. Behind the bare figures stand

- Disposable income earned by Australians which they are recycling into the system as a result of spending money on services that address their quality of life.
- Taxes that are collected in many ways as a result of consumer NTE expenditure.
- Taxation on Core NTE establishment utility provision and GST are important components which also serve a range of public purposes well outside the needs of the NTE.
- Support for families and for careers that define much that is good about Australian life.
- Income from overseas sources which is important to the balance of trade which when out of balance leads to rising prices or scarcities and increases the cost of living.
- Opportunity for new immigrant Australians who bring rich cultural diversity to the country and should find the NTE as one of the spaces where information and understanding are exchanged

The places of primary concentration of NTE services follow the places of urban centre concentration.

Although they are small geographies – tiny by Australian geographic standards - the LGAs of Melbourne and Sydney hold by far the largest concentrations of NTE activities in the country.

In Summary

The Core NTE is a key part of the Australian economy. As large as Tourism with which it has many collocated and interactive interests

Nearly 3 million jobs out of the total 11.5 million in the federal economy have some direct or indirect relationship with the overall Core and Non-Core NTE

Over the period from 2009 to 2014 the rate of growth of the Core NTE economy has been 50% better than overall revenue growth in the federal economy

In spite of this positive record of economic growth and its significance to the overall economy the NTE is fractured by unresolved debate between interests with different perspectives which inhibit market and community interest optimisation

A better model of governance and related best practice and cost funding is at the heart of improvement

12. Appendix A: ANZSIC NTE Categories – Core and Non-Core

NTE Sector	NTE Sub-Sector	ANZSIC	Description	Level
Core	Drink	4123	Liquor Retailing	4-Digit
Core	Drink	4520	Pubs, Taverns and Bars	4-Digit
Core	Entertainment	900	Creative and Performing Arts Activities	3-Digit
Core	Entertainment	911	Sports and Physical Recreation Activities	3-Digit
Core	Entertainment	912	Horse and Dog Racing Activities	3-Digit
Core	Entertainment	913	Amusement and Other Recreation Activities	3-Digit
Core	Entertainment	920	Gambling Activities	3-Digit
Core	Entertainment	4530	Clubs (Hospitality)	4-Digit
Core	Entertainment	9534	Brothel Keeping and Prostitution	4-Digit
Core	Food	4511	Cafes and Restaurants	4-Digit
Core	Food	4512	Takeaway Food Services	4-Digit
Non-Core	Care	771	Public Order and Safety Services	3-Digit
Non-Core	Care	840	Hospitals	3-Digit
Non-Core	Creative Education	8212	Arts Education	4-Digit
Non-Core	Cultural	601	Libraries and Archives	3-Digit
Non-Core	Design	692	Architectural, Engineering and Technical Services	3-Digit
Non-Core	Education	821	Adult, Community and Other Education	3-Digit
Non-Core	Food	411	Supermarket and Grocery Stores	3-Digit
Non-Core	Food	412	Specialised Food Retailing	3-Digit
Non-Core	Hospitality	4400		4-Digit
Non-Core	Infrastructure	29	Waste Collection, Treatment and Disposal Services	2-Digit
Non-Core	Infrastructure	751	Central Government Administration	3-Digit
Non-Core	Infrastructure	753	Local Government Administration	3-Digit
Non-Core	Infrastructure	772	Regulatory Services	3-Digit
Non-Core	Infrastructure	9531	Laundry and Dry Cleaning Services	4-Digit
Non-Core	Promotion	694	Advertising Services	3-Digit
Non-Core	Research	695	Market Research and Statistical Services	3-Digit
Non-Core	Retail/Other	422	Electrical and Electronic Goods Retailing	3-Digit
Non-Core	Retail/Other	424	Recreational Goods Retailing	3-Digit
Non-Core	Retail/Other	425	Clothing, Footwear and Personal Accessory Retailing	3-Digit
Non-Core	Retail/Other	426	Department Stores	3-Digit
Non-Core	Retail/Other	427	Pharmaceutical and Other Store Based Retailing	3-Digit
Non-Core	Retail/Other	4241	Sport and Camping Equipment Retailing	4-Digit
Non-Core	Retail/Other	4242	Entertainment Media Retailing	4-Digit
Non-Core	Retail/Other	4243	Toy and Game Retailing	4-Digit
Non-Core	Sports Education	8211	Sports and Physical Recreation Instruction	4-Digit
Non-Core	Transport	462	Road Passenger Transport	3-Digit
Non-Core	Transport	472	Rail Passenger Transport	3-Digit
Non-Core	Transport	482	Water Passenger Transport	3-Digit
Non-Core	Transport	4623	Taxi and Other Road Transport	4-Digit
Non-Core	Transport	9533	Parking Services	4-Digit
Supply	Drink	12	Beverage and Tobacco Product Manufacturing	2-Digit
Supply	Drink	3606	Liquor and Tobacco Product Wholesaling	4-Digit
Supply	Entertainment	551	Motion Picture and Video Activities	3-Digit
Supply	Entertainment	552	Sound Recording and Music Publishing	3-Digit
Supply	Food	4513	Catering Services	4-Digit
Supply	Food	11	Food Product Manufacturing	2-Digit

13. Appendix B: Study Background References

Adelaide City Council Evidence Base 2011-2012 – Night Time Employment

Alcohol consumption in the night-time economy – GLA - Melisa Wickham - September 2012

Alcohol-Related Offences in ACT 2013 - Rebecca Mathews, Australian National University & Tim Legrand,

Amended guidance on the Late Night Levy - Home Office December 2012

Australian National University and Griffith University

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Australian National Accounts: National Income, Expenditure and Product, Mar 2014

ABS 6105.0 - Australian Labour Market Statistics, Oct 2010

ABS 6202.0 - Labour Force, Australia, Jul 2014

A Cost Benefit Study of the Sydney NTE by TBR and MAKE Associates – 2010

A Cost Benefit Study of the Westminster ENTE by TBR – 2014

Cities of Opportunity – PWC 2014

City Spaces - Sydney LGA Website – Creative Spaces - 2014

Dealing with alcohol-related harm and the night-time economy – DANTE 2012

Demonstrating Success & KPIs – Purple Flag 2012

Effective NHS contributions to violence prevention - The Cardiff Model

Edinburgh's Evening Economy - A report for the City of Edinburgh Council 2010

Future of Stratford East London economy after the Olympics 2012 – T Bevan, P Davies and A Turnham

Gambling Industries, Australia, 1997-98 ABS (8684.0)

Global Destination Cities Index - Dr. Yuwa Hedrick-Wong and Desmond Choog

Heart of London BID - Corporate Property Model

ID – The population experts – June 2013 estimates and LGA reported populations

Job Generation Process – 1979 – David Birch Massachusetts Institute of Technology

Fit for the Future - Our plan for modernising London Underground, Overground, Trams and the DLR

Planning for Canberra’s night-time economies - ACT Planning and Land Authority April 2011

Reserve Bank of Australia

Service Evaluation of the Soho Alcohol Recovery Centre (SARC)

The Cardiff Research Model - Professor Jonathan Shepherd - Cardiff University Hospital

The cost of Crime - Matthew Sinclair and Corin Taylor

The Economic Impact of the Nightlife Industry on New York City: Audience Research & Analysis 2004

The FES – Sydney Floor Space and Employment Survey

The impact of restricted alcohol availability on alcohol-related violence in Newcastle, NSW - 2008

Jones, Kypri, Moffatt, Borzycki & Bryan Price

http://www.pubsandclubs.com.au/venues/darwin-and-surrounds/

http://www.cityofsydney.nsw.gov.au/business/business-support/business-grants-and-sponsorships

14. Appendix C: LGA Core NTE Establishment/ Employment Data

14.1 Adelaide

Establishment or Firm Number Change 2009 to 2014

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	15	18	3	20.0%	2.0%	2.3%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	103	115	12	11.7%	13.8%	15.0%	6.8%	6.3%
Drink Total			**118**	**133**	**15**	**12.7%**	**15.8%**	**17.3%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	17	13	-4	-23.5%	2.3%	1.7%	3.5%	3.0%
	900	Creative & Performing Arts Activities	50	52	2	4.0%	6.7%	6.8%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	29	29	0	0.0%	3.9%	3.8%	6.7%	6.9%
	912	Horse & Dog Racing Activities	3	0	-3	-100.0%	0.4%	0.0%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	9	7	-2	-22.2%	1.2%	0.9%	2.2%	2.0%
	920	Gambling Activities	12	11	-1	-8.3%	1.6%	1.4%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	3	3	0	0.0%	0.4%	0.4%	0.4%	0.3%
Entertainment Total			**122**	**114**	**-8**	**-6.6%**	**16.4%**	**14.9%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	349	372	23	6.6%	46.8%	48.5%	32.1%	36.6%
	4512	Takeaway Food Services	156	148	-8	-5.1%	20.9%	19.3%	25.2%	24.8%
Food Total			**505**	**520**	**15**	**3.0%**	**67.8%**	**67.8%**	**57.3%**	**61.5%**
Core Total			**745**	**767**	**22**	**3.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	120	113	-7	-5.8%	1.2%	1.1%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	2,217	2,242	25	1.1%	21.4%	21.3%	12.7%	10.8%
Drink Total			**2,337**	**2,356**	**19**	**0.8%**	**22.5%**	**22.3%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	207	272	65	31.4%	2.0%	2.6%	6.6%	6.7%
	900	Creative & Performing Arts Activities	461	683	222	48.2%	4.4%	6.5%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	184	203	19	10.3%	1.8%	1.9%	7.7%	7.7%
	912	Horse & Dog Racing Activities	18	0	-18	-100.0%	0.2%	0.0%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	18	19	1	5.6%	0.2%	0.2%	2.1%	2.3%
	920	Gambling Activities	689	719	30	4.4%	6.6%	6.8%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	22	27	5	22.7%	0.2%	0.3%	0.2%	0.2%
Entertainment Total			**1,598**	**1,923**	**325**	**20.3%**	**15.4%**	**18.2%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	4,995	5,025	30	0.6%	48.1%	47.6%	37.8%	38.3%
	4512	Takeaway Food Services	1,448	1,245	-203	-14.0%	14.0%	11.8%	23.6%	25.0%
Food Total			**6,444**	**6,269**	**-175**	**-2.7%**	**62.1%**	**59.4%**	**61.4%**	**63.3%**
Core Total			**10,378**	**10,548**	**170**	**1.6%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.2 Brisbane

Establishment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	% Change	% Core NTE 2009	2014	% Core NTE Australia 2009	2014
Drink	4123	Liquor Retailing	27	27	0	0.0%	0.6%	0.5%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	235	235	0	0.0%	5.1%	4.4%	6.8%	6.3%
Drink Total			**262**	**262**	**0**	**0.0%**	**5.6%**	**4.9%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	150	133	-17	-11.3%	3.2%	2.5%	3.5%	3.0%
	900	Creative & Performing Arts Activities	862	786	-76	-8.8%	18.6%	14.7%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	332	451	119	35.8%	7.2%	8.5%	6.7%	6.9%
	912	Horse & Dog Racing Activities	64	57	-7	-10.9%	1.4%	1.1%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	99	76	-23	-23.2%	2.1%	1.4%	2.2%	2.0%
	920	Gambling Activities	72	63	-9	-12.5%	1.6%	1.2%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	18	17	-1	-5.6%	0.4%	0.3%	0.4%	0.3%
Entertainment Total			**1,597**	**1,582**	**-15**	**-0.9%**	**34.4%**	**29.7%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	1,587	2,099	512	32.3%	34.2%	39.4%	32.1%	36.6%
	4512	Takeaway Food Services	1,193	1,391	198	16.6%	25.7%	26.1%	25.2%	24.8%
Food Total			**2,780**	**3,490**	**710**	**25.5%**	**59.9%**	**65.4%**	**57.3%**	**61.5%**
Core Total			**4,639**	**5,334**	**695**	**15.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	% Change	% Core NTE 2009	2014	% Core NTE Australia 2009	2014
Drink	4123	Liquor Retailing	167	192	25	15.0%	0.3%	0.3%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	4,413	4,361	-52	-1.2%	8.6%	7.3%	12.7%	10.8%
Drink Total			**4,580**	**4,554**	**-26**	**-0.6%**	**8.9%**	**7.6%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	2,604	2,864	260	10.0%	5.1%	4.8%	6.6%	6.7%
	900	Creative & Performing Arts Activities	2,073	2,412	339	16.4%	4.0%	4.0%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	4,192	5,195	1,003	23.9%	8.2%	8.7%	7.7%	7.7%
	912	Horse & Dog Racing Activities	212	212	0	0.0%	0.4%	0.4%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	1,250	1,599	349	27.9%	2.4%	2.7%	2.1%	2.3%
	920	Gambling Activities	3,821	4,019	198	5.2%	7.5%	6.7%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	144	112	-32	-22.2%	0.3%	0.2%	0.2%	0.2%
Entertainment Total			**14,296**	**16,413**	**2,117**	**14.8%**	**27.9%**	**27.4%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	21,157	26,850	5,693	26.9%	41.3%	44.8%	37.8%	38.3%
	4512	Takeaway Food Services	11,190	12,142	952	8.5%	21.8%	20.3%	23.6%	25.0%
Food Total			**32,347**	**38,991**	**6,644**	**20.5%**	**63.1%**	**65.0%**	**61.4%**	**63.3%**
Core Total			**51,224**	**59,958**	**8,734**	**17.1%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.3 Darwin

Establishment Change 2009 to 2014

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	**ANZSIC**	**Description**	**2009**	**2014**	**Change**	**% Change**	**2009**	**2014**	**2009**	**2014**
Drink	4123	Liquor Retailing	4	4	0	0.0%	1.2%	1.2%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	17	13	-4	-23.5%	5.0%	3.9%	6.8%	6.3%
Drink Total			**21**	**18**	**-3**	**-14.3%**	**6.2%**	**5.3%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	13	12	-1	-7.7%	3.8%	3.6%	3.5%	3.0%
	900	Creative & Performing Arts Activities	49	39	-10	-20.4%	14.4%	11.6%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	22	18	-4	-18.2%	6.5%	5.3%	6.7%	6.9%
	912	Horse & Dog Racing Activities	10	7	-3	-30.0%	2.9%	2.1%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	13	9	-4	-30.8%	3.8%	2.7%	2.2%	2.0%
	920	Gambling Activities	14	11	-3	-21.4%	4.1%	3.3%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	3	5	2	66.7%	0.9%	1.5%	0.4%	0.3%
Entertainment Total			**123**	**101**	**-22**	**-17.9%**	**36.1%**	**30.0%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	80	99	19	23.8%	23.5%	29.4%	32.1%	36.6%
	4512	Takeaway Food Services	117	120	3	2.6%	34.3%	35.6%	25.2%	24.8%
Food Total			**197**	**219**	**22**	**11.2%**	**57.8%**	**65.0%**	**57.3%**	**61.5%**
Core Total			**341**	**337**	**-4**	**-1.2%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	**ANZSIC**	**Description**	**2009**	**2014**	**Change**	**% Change**	**2009**	**2014**	**2009**	**2014**
Drink	4123	Liquor Retailing	28	40	12	42.9%	0.6%	0.8%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	286	484	198	69.2%	6.3%	10.0%	12.7%	10.8%
Drink Total			**315**	**525**	**210**	**66.7%**	**6.9%**	**10.8%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	182	152	-30	-16.5%	4.0%	3.1%	6.6%	6.7%
	900	Creative & Performing Arts Activities	520	470	-50	-9.6%	11.4%	9.7%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	155	119	-36	-23.2%	3.4%	2.4%	7.7%	7.7%
	912	Horse & Dog Racing Activities	69	54	-15	-21.7%	1.5%	1.1%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	29	19	-10	-34.5%	0.6%	0.4%	2.1%	2.3%
	920	Gambling Activities	926	771	-155	-16.7%	20.4%	15.9%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	25	25	0	0.0%	0.5%	0.5%	0.2%	0.2%
Entertainment Total			**1,906**	**1,611**	**-295**	**-15.5%**	**41.9%**	**33.1%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	1,195	1,508	313	26.2%	26.3%	31.0%	37.8%	38.3%
	4512	Takeaway Food Services	1,134	1,219	85	7.5%	24.9%	25.1%	23.6%	25.0%
Food Total			**2,329**	**2,728**	**399**	**17.1%**	**51.2%**	**56.1%**	**61.4%**	**63.3%**
Core Total			**4,550**	**4,863**	**313**	**6.9%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.4 Hobart

Establishment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	% Change	% Core NTE 2009	2014	% Core NTE Australia 2009	2014
Drink	4123	Liquor Retailing	7	8	1	14.3%	1.5%	1.7%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	64	51	-13	-20.3%	14.1%	10.6%	6.8%	6.3%
Drink Total			**71**	**59**	**-12**	**-16.9%**	**15.7%**	**12.3%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	13	12	-1	-7.7%	2.9%	2.5%	3.5%	3.0%
	900	Creative & Performing Arts Activities	75	77	2	2.7%	16.6%	16.0%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	16	21	5	31.3%	3.5%	4.4%	6.7%	6.9%
	912	Horse & Dog Racing Activities	3	3	0	0.0%	0.7%	0.6%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	8	7	-1	-12.5%	1.8%	1.5%	2.2%	2.0%
	920	Gambling Activities	3	3	0	0.0%	0.7%	0.6%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	*	0	*	*	*	0.0%	0.4%	0.3%
Entertainment Total			**118**	**123**	**5**	**4.2%**	**26.0%**	**25.6%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	177	209	32	18.1%	39.1%	43.5%	32.1%	36.6%
	4512	Takeaway Food Services	87	89	2	2.3%	19.2%	18.5%	25.2%	24.8%
Food Total			**264**	**298**	**34**	**12.9%**	**58.3%**	**62.1%**	**57.3%**	**61.5%**
Core Total			**453**	**480**	**27**	**6.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	% Change	% Core NTE 2009	2014	% Core NTE Australia 2009	2014
Drink	4123	Liquor Retailing	47	27	-20	-42.6%	0.8%	0.4%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	1,168	1,032	-136	-11.6%	19.8%	17.1%	12.7%	10.8%
Drink Total			**1,215**	**1,059**	**-156**	**-12.8%**	**20.6%**	**17.6%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	177	209	32	18.1%	3.0%	3.5%	6.6%	6.7%
	900	Creative & Performing Arts Activities	769	864	95	12.4%	13.0%	14.3%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	110	138	28	25.5%	1.9%	2.3%	7.7%	7.7%
	912	Horse & Dog Racing Activities	20	24	4	20.0%	0.3%	0.4%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	17	22	5	29.4%	0.3%	0.4%	2.1%	2.3%
	920	Gambling Activities	193	226	33	17.1%	3.3%	3.8%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	*	0	*	*	*	0.0%	0.2%	0.2%
Entertainment Total			**1,286**	**1,483**	**197**	**15.3%**	**21.8%**	**24.6%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	2,575	2,734	159	6.2%	43.7%	45.4%	37.8%	38.3%
	4512	Takeaway Food Services	821	745	-76	-9.3%	13.9%	12.4%	23.6%	25.0%
Food Total			**3,396**	**3,479**	**83**	**2.4%**	**57.6%**	**57.8%**	**61.4%**	**63.3%**
Core Total			**5,897**	**6,022**	**125**	**2.1%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.5 Maroondah

Establishment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	% Change	% Core NTE 2009	2014	% Core NTE Australia 2009	2014
Drink	4123	Liquor Retailing	11	8	-3	-27.3%	3.3%	2.3%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	13	10	-3	-23.1%	3.9%	2.9%	6.8%	6.3%
Drink Total			**24**	**18**	**-6**	**-25.0%**	**7.2%**	**5.2%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	7	8	1	14.3%	2.1%	2.3%	3.5%	3.0%
	900	Creative & Performing Arts Activities	59	46	-13	-22.0%	17.8%	13.3%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	27	21	-6	-22.2%	8.1%	6.1%	6.7%	6.9%
	912	Horse & Dog Racing Activities	3	6	3	100.0%	0.9%	1.7%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	7	3	-4	-57.1%	2.1%	0.9%	2.2%	2.0%
	920	Gambling Activities	6	6	0	0.0%	1.8%	1.7%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	3	6	3	100.0%	0.9%	1.7%	0.4%	0.3%
Entertainment Total			**111**	**95**	**-16**	**-14.4%**	**33.4%**	**27.5%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	97	134	37	38.1%	29.2%	38.8%	32.1%	36.6%
	4512	Takeaway Food Services	100	97	-3	-3.0%	30.1%	28.1%	25.2%	24.8%
Food Total			**197**	**232**	**35**	**17.8%**	**59.3%**	**67.2%**	**57.3%**	**61.5%**
Core Total			**332**	**345**	**13**	**3.9%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	% Change	% Core NTE 2009	2014	% Core NTE Australia 2009	2014
Drink	4123	Liquor Retailing	51	57	6	11.8%	1.9%	2.2%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	164	206	42	25.6%	6.2%	8.0%	12.7%	10.8%
Drink Total			**215**	**263**	**48**	**22.3%**	**8.2%**	**10.2%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	80	50	-30	-37.5%	3.0%	1.9%	6.6%	6.7%
	900	Creative & Performing Arts Activities	520	351	-169	-32.5%	19.8%	13.6%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	162	90	-72	-44.4%	6.2%	3.5%	7.7%	7.7%
	912	Horse & Dog Racing Activities	17	56	39	229.4%	0.6%	2.2%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	13	7	-6	-46.2%	0.5%	0.3%	2.1%	2.3%
	920	Gambling Activities	325	231	-94	-28.9%	12.4%	8.9%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	20	13	-7	-35.0%	0.8%	0.5%	0.2%	0.2%
Entertainment Total			**1,137**	**799**	**-338**	**-29.7%**	**43.3%**	**30.8%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	765	966	201	26.3%	29.1%	37.3%	37.8%	38.3%
	4512	Takeaway Food Services	511	563	52	10.2%	19.4%	21.7%	23.6%	25.0%
Food Total			**1,276**	**1,528**	**252**	**19.7%**	**48.6%**	**59.0%**	**61.4%**	**63.3%**
Core Total			**2,628**	**2,590**	**-38**	**-1.4%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.6 Melbourne

Establishment Change 2009 to 2014

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	**ANZSIC**	**Description**	**2009**	**2014**	**Change**	**% Change**	**2009**	**2014**	**2009**	**2014**
Drink	4123	Liquor Retailing	45	66	21	46.7%	2.2%	2.7%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	211	194	-17	-8.1%	10.4%	7.8%	6.8%	6.3%
Drink Total			**256**	**260**	**4**	**1.6%**	**12.6%**	**10.5%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	37	26	-11	-29.7%	1.8%	1.0%	3.5%	3.0%
	900	Creative & Performing Arts Activities	260	272	12	4.6%	12.8%	11.0%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	80	102	22	27.5%	3.9%	4.1%	6.7%	6.9%
	912	Horse & Dog Racing Activities	10	13	3	30.0%	0.5%	0.5%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	21	26	5	23.8%	1.0%	1.0%	2.2%	2.0%
	920	Gambling Activities	36	39	3	8.3%	1.8%	1.6%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	12	10	-2	-16.7%	0.6%	0.4%	0.4%	0.3%
Entertainment Total			**456**	**488**	**32**	**7.0%**	**22.4%**	**19.7%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	972	1,276	304	31.3%	47.7%	51.5%	32.1%	36.6%
	4512	Takeaway Food Services	353	456	103	29.2%	17.3%	18.4%	25.2%	24.8%
Food Total			**1,325**	**1,731**	**406**	**30.6%**	**65.0%**	**69.8%**	**57.3%**	**61.5%**
Core Total			**2,037**	**2,480**	**443**	**21.7%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	**ANZSIC**	**Description**	**2009**	**2014**	**Change**	**% Change**	**2009**	**2014**	**2009**	**2014**
Drink	4123	Liquor Retailing	268	354	86	32.1%	1.1%	1.3%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	3,385	3,292	-93	-2.7%	14.1%	12.4%	12.7%	10.8%
Drink Total			**3,654**	**3,646**	**-8**	**-0.2%**	**15.3%**	**13.7%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	521	462	-59	-11.3%	2.2%	1.7%	6.6%	6.7%
	900	Creative & Performing Arts Activities	2,725	2,362	-363	-13.3%	11.4%	8.9%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	569	453	-116	-20.4%	2.4%	1.7%	7.7%	7.7%
	912	Horse & Dog Racing Activities	70	61	-9	-12.9%	0.3%	0.2%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	48	48	0	0.0%	0.2%	0.2%	2.1%	2.3%
	920	Gambling Activities	2,398	2,124	-274	-11.4%	10.0%	8.0%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	100	50	-50	-50.0%	0.4%	0.2%	0.2%	0.2%
Entertainment Total			**6,430**	**5,560**	**-870**	**-13.5%**	**26.9%**	**20.9%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	11,217	14,062	2,845	25.4%	46.9%	52.9%	37.8%	38.3%
	4512	Takeaway Food Services	2,642	3,307	665	25.2%	11.0%	12.4%	23.6%	25.0%
Food Total			**13,858**	**17,369**	**3,511**	**25.3%**	**57.9%**	**65.4%**	**61.4%**	**63.3%**
Core Total			**23,942**	**26,575**	**2,633**	**11.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.7 Newcastle

Establishment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	2009 - 2014 % Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	23	24	1	4.3%	2.9%	2.9%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	88	80	-8	-9.1%	11.2%	9.8%	6.8%	6.3%
Drink Total			**111**	**104**	**-7**	**-6.3%**	**14.1%**	**12.7%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	51	36	-15	-29.4%	6.5%	4.4%	3.5%	3.0%
	900	Creative & Performing Arts Activities	126	118	-8	-6.3%	16.0%	14.4%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	49	56	7	14.3%	6.2%	6.9%	6.7%	6.9%
	912	Horse & Dog Racing Activities	15	17	2	13.3%	1.9%	2.1%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	21	22	1	4.8%	2.7%	2.7%	2.2%	2.0%
	920	Gambling Activities	11	8	-3	-27.3%	1.4%	1.0%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	5	9	4	80.0%	0.6%	1.1%	0.4%	0.3%
Entertainment Total			**278**	**266**	**-12**	**-4.3%**	**35.2%**	**32.6%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	223	262	39	17.5%	28.3%	32.1%	32.1%	36.6%
	4512	Takeaway Food Services	177	185	8	4.5%	22.4%	22.6%	25.2%	24.8%
Food Total			**400**	**447**	**47**	**11.8%**	**50.7%**	**54.7%**	**57.3%**	**61.5%**
Core Total			**789**	**817**	**28**	**3.5%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	2009 - 2014 % Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	154	162	8	5.2%	1.5%	1.4%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	1,585	1,613	28	1.8%	15.8%	14.1%	12.7%	10.8%
Drink Total			**1,739**	**1,775**	**36**	**2.1%**	**17.3%**	**15.5%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	831	629	-202	-24.3%	8.3%	5.5%	6.6%	6.7%
	900	Creative & Performing Arts Activities	1,527	1,481	-46	-3.0%	15.2%	13.0%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	403	528	125	31.0%	4.0%	4.6%	7.7%	7.7%
	912	Horse & Dog Racing Activities	121	116	-5	-4.1%	1.2%	1.0%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	55	67	12	21.8%	0.5%	0.6%	2.1%	2.3%
	920	Gambling Activities	847	650	-197	-23.3%	8.4%	5.7%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	48	50	2	4.2%	0.5%	0.4%	0.2%	0.2%
Entertainment Total			**3,831**	**3,519**	**-312**	**-8.1%**	**38.1%**	**30.8%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	2,963	3,921	958	32.3%	29.5%	34.3%	37.8%	38.3%
	4512	Takeaway Food Services	1,525	2,206	681	44.7%	15.2%	19.3%	23.6%	25.0%
Food Total			**4,489**	**6,127**	**1,638**	**36.5%**	**44.6%**	**53.6%**	**61.4%**	**63.3%**
Core Total			**10,059**	**11,422**	**1,363**	**13.6%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.8 Parramatta

Establishment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	2009 - 2014 % Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	26	17	-9	-34.6%	2.8%	1.5%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	19	20	1	5.3%	2.0%	1.8%	6.8%	6.3%
Drink Total			**45**	**37**	**-8**	**-17.8%**	**4.8%**	**3.2%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	25	21	-4	-16.0%	2.7%	1.8%	3.5%	3.0%
	900	Creative & Performing Arts Activities	127	97	-30	-23.6%	13.6%	8.5%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	42	39	-3	-7.1%	4.5%	3.4%	6.7%	6.9%
	912	Horse & Dog Racing Activities	16	8	-8	-50.0%	1.7%	0.7%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	9	17	8	88.9%	1.0%	1.5%	2.2%	2.0%
	920	Gambling Activities	12	18	6	50.0%	1.3%	1.6%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	9	17	8	88.9%	1.0%	1.5%	0.4%	0.3%
Entertainment Total			**240**	**219**	**-21**	**-8.8%**	**25.8%**	**19.2%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	346	480	134	38.7%	37.2%	42.0%	32.1%	36.6%
	4512	Takeaway Food Services	300	406	106	35.3%	32.2%	35.6%	25.2%	24.8%
Food Total			**646**	**886**	**240**	**37.2%**	**69.4%**	**77.6%**	**57.3%**	**61.5%**
Core Total			**931**	**1,142**	**211**	**22.7%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	2009 - 2014 % Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	187	234	47	25.1%	2.4%	2.8%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	363	336	-27	-7.4%	4.7%	4.0%	12.7%	10.8%
Drink Total			**550**	**570**	**20**	**3.6%**	**7.2%**	**6.9%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	277	202	-75	-27.1%	3.6%	2.4%	6.6%	6.7%
	900	Creative & Performing Arts Activities	1,048	764	-284	-27.1%	13.7%	9.2%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	235	165	-70	-29.8%	3.1%	2.0%	7.7%	7.7%
	912	Horse & Dog Racing Activities	88	50	-38	-43.2%	1.2%	0.6%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	16	20	4	25.0%	0.2%	0.2%	2.1%	2.3%
	920	Gambling Activities	629	750	121	19.2%	8.2%	9.0%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	59	57	-2	-3.4%	0.8%	0.7%	0.2%	0.2%
Entertainment Total			**2,353**	**2,008**	**-345**	**-14.7%**	**30.8%**	**24.2%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	3,036	3,617	581	19.1%	39.7%	43.5%	37.8%	38.3%
	4512	Takeaway Food Services	1,707	2,116	409	24.0%	22.3%	25.5%	23.6%	25.0%
Food Total			**4,743**	**5,733**	**990**	**20.9%**	**62.0%**	**69.0%**	**61.4%**	**63.3%**
Core Total			**7,646**	**8,311**	**665**	**8.7%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.9 Perth

Establishment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	2009 - 2014 % Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	18	17	-1	-5.6%	2.7%	2.2%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	73	83	10	13.7%	10.8%	10.8%	6.8%	6.3%
Drink Total			**91**	**99**	**8**	**8.8%**	**13.5%**	**12.9%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	18	16	-2	-11.1%	2.7%	2.1%	3.5%	3.0%
	900	Creative & Performing Arts Activities	59	47	-12	-20.3%	8.7%	6.1%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	28	20	-8	-28.6%	4.1%	2.6%	6.7%	6.9%
	912	Horse & Dog Racing Activities	3	0	-3	-100.0%	0.4%	0.0%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	8	14	6	75.0%	1.2%	1.8%	2.2%	2.0%
	920	Gambling Activities	10	11	1	10.0%	1.5%	1.4%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	3	5	2	66.7%	0.4%	0.7%	0.4%	0.3%
Entertainment Total			**128**	**112**	**-16**	**-12.5%**	**18.9%**	**14.6%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	319	389	70	21.9%	47.2%	50.6%	32.1%	36.6%
	4512	Takeaway Food Services	138	167	29	21.0%	20.4%	21.7%	25.2%	24.8%
Food Total			**457**	**557**	**100**	**21.9%**	**67.6%**	**72.4%**	**57.3%**	**61.5%**
Core Total			**676**	**769**	**93**	**13.8%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	2009 - 2014 % Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	149	143	-6	-4.0%	1.4%	1.5%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	1,625	1,785	160	9.8%	15.6%	18.2%	12.7%	10.8%
Drink Total			**1,774**	**1,928**	**154**	**8.7%**	**17.0%**	**19.7%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	301	198	-103	-34.2%	2.9%	2.0%	6.6%	6.7%
	900	Creative & Performing Arts Activities	746	462	-284	-38.1%	7.2%	4.7%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	236	206	-30	-12.7%	2.3%	2.1%	7.7%	7.7%
	912	Horse & Dog Racing Activities	25	0	-25	-100.0%	0.2%	0.0%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	21	17	-4	-19.0%	0.2%	0.2%	2.1%	2.3%
	920	Gambling Activities	790	483	-307	-38.9%	7.6%	4.9%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	30	17	-13	-43.3%	0.3%	0.2%	0.2%	0.2%
Entertainment Total			**2,148**	**1,383**	**-765**	**-35.6%**	**20.6%**	**14.1%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	5,080	5,035	-45	-0.9%	48.7%	51.4%	37.8%	38.3%
	4512	Takeaway Food Services	1,425	1,457	32	2.2%	13.7%	14.9%	23.6%	25.0%
Food Total			**6,506**	**6,493**	**-13**	**-0.2%**	**62.4%**	**66.2%**	**61.4%**	**63.3%**
Core Total			**10,428**	**9,803**	**-625**	**-6.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.10 Port Phillip

Establishment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	2009 - 2014 % Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	32	33	1	3.1%	3.0%	2.8%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	80	84	4	5.0%	7.4%	7.0%	6.8%	6.3%
Drink Total			**112**	**117**	**5**	**4.5%**	**10.3%**	**9.8%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	6	6	0	0.0%	0.6%	0.5%	3.5%	3.0%
	900	Creative & Performing Arts Activities	334	338	4	1.2%	30.8%	28.2%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	64	69	5	7.8%	5.9%	5.8%	6.7%	6.9%
	912	Horse & Dog Racing Activities	7	10	3	42.9%	0.6%	0.8%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	23	18	-5	-21.7%	2.1%	1.5%	2.2%	2.0%
	920	Gambling Activities	21	19	-2	-9.5%	1.9%	1.6%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	11	13	2	18.2%	1.0%	1.1%	0.4%	0.3%
Entertainment Total			**466**	**473**	**7**	**1.5%**	**43.0%**	**39.4%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	338	457	119	35.2%	31.2%	38.1%	32.1%	36.6%
	4512	Takeaway Food Services	168	151	-17	-10.1%	15.5%	12.6%	25.2%	24.8%
Food Total			**506**	**609**	**103**	**20.4%**	**46.7%**	**50.8%**	**57.3%**	**61.5%**
Core Total			**1,084**	**1,199**	**115**	**10.6%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

Sub-Sector	ANZSIC	Description	2009	2014	2009 - 2014 Change	2009 - 2014 % Change	% Core NTE 2009	% Core NTE 2014	% Core NTE Australia 2009	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	208	217	9	4.3%	2.0%	1.8%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	1,399	1,409	10	0.7%	13.5%	11.6%	12.7%	10.8%
Drink Total			**1,607**	**1,626**	**19**	**1.2%**	**15.5%**	**13.3%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	52	52	0	0.0%	0.5%	0.4%	6.6%	6.7%
	900	Creative & Performing Arts Activities	2,139	2,362	223	10.4%	20.7%	19.4%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	278	344	66	23.7%	2.7%	2.8%	7.7%	7.7%
	912	Horse & Dog Racing Activities	30	33	3	10.0%	0.3%	0.3%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	32	33	1	3.1%	0.3%	0.3%	2.1%	2.3%
	920	Gambling Activities	855	946	91	10.6%	8.3%	7.8%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	56	72	16	28.6%	0.5%	0.6%	0.2%	0.2%
Entertainment Total			**3,441**	**3,843**	**402**	**11.7%**	**33.2%**	**31.5%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	4,015	5,355	1,340	33.4%	38.8%	43.9%	37.8%	38.3%
	4512	Takeaway Food Services	1,294	1,367	73	5.6%	12.5%	11.2%	23.6%	25.0%
Food Total			**5,309**	**6,722**	**1,413**	**26.6%**	**51.3%**	**55.1%**	**61.4%**	**63.3%**
Core Total			**10,356**	**12,190**	**1,834**	**17.7%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

14.11 Sydney

Establishment Change 2009 to 2014

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	106	142	36	34.0%	2.7%	3.0%	2.5%	2.3%
	4520	Pubs, Taverns and Bars	310	434	124	40.0%	7.8%	9.1%	6.8%	6.3%
Drink Total			**416**	**575**	**159**	**38.2%**	**10.5%**	**12.1%**	**9.3%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	50	46	-4	-8.0%	1.3%	1.0%	3.5%	3.0%
	551	Motion Picture and Video Activities *	14	14	0	0.0%	0.4%	0.3%	*	*
	900	Creative & Performing Arts Activities	447	423	-24	-5.4%	11.2%	8.9%	16.3%	14.1%
	911	Sports & Physical Recreation Activities	210	219	9	4.3%	5.3%	4.6%	6.7%	6.9%
	912	Horse & Dog Racing Activities	7	5	-2	-28.6%	0.2%	0.1%	2.5%	2.0%
	913	Amusement & Other Recreation Activities	14	11	-3	-21.4%	0.4%	0.2%	2.2%	2.0%
	920	Gambling Activities	42	34	-8	-19.0%	1.1%	0.7%	1.8%	1.5%
	9534	Brothel Keeping & Prostitution	51	74	23	45.1%	1.3%	1.6%	0.4%	0.3%
Entertainment Total			**835**	**824**	**-11**	**-1.3%**	**21.0%**	**17.3%**	**33.4%**	**29.9%**
Food	4511	Cafes and Restaurants	2,033	2,571	538	26.5%	51.1%	54.1%	32.1%	36.6%
	4512	Takeaway Food Services	697	783	86	12.3%	17.5%	16.5%	25.2%	24.8%
Food Total			**2,729**	**3,354**	**625**	**22.9%**	**68.6%**	**70.6%**	**57.3%**	**61.5%**
Core Total			**3,981**	**4,754**	**773**	**19.4%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends adjusted 2011 cohorts

Employment Change 2009 to 2014

					2009 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2009	2014	Change	% Change	2009	2014	2009	2014
Drink	4123	Liquor Retailing	436	575	139	31.9%	1.5%	1.8%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	3,875	4,712	837	21.6%	13.7%	14.8%	12.7%	10.8%
Drink Total			**4,311**	**5,287**	**976**	**22.6%**	**15.2%**	**16.6%**	**14.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	828	725	-103	-12.4%	2.9%	2.3%	6.6%	6.7%
	551	Motion Picture and Video Activities *	214	231	17	7.9%	0.8%	0.7%	*	*
	900	Creative & Performing Arts Activities	2,391	2,748	357	14.9%	8.4%	8.6%	4.5%	3.9%
	911	Sports & Physical Recreation Activities	826	855	29	3.5%	2.9%	2.7%	7.7%	7.7%
	912	Horse & Dog Racing Activities	41	42	1	2.4%	0.1%	0.1%	1.4%	1.4%
	913	Amusement & Other Recreation Activities	27	27	0	0.0%	0.1%	0.1%	2.1%	2.3%
	920	Gambling Activities	2,233	2,398	165	7.4%	7.9%	7.5%	1.4%	1.8%
	9534	Brothel Keeping & Prostitution	175	257	82	46.9%	0.6%	0.8%	0.2%	0.2%
Entertainment Total			**6,736**	**7,282**	**546**	**8.1%**	**23.8%**	**22.8%**	**23.9%**	**23.9%**
Food	4511	Cafes and Restaurants	14,154	16,417	2,263	16.0%	49.9%	51.5%	37.8%	38.3%
	4512	Takeaway Food Services	3,146	2,886	-260	-8.3%	11.1%	9.1%	23.6%	25.0%
Food Total			**17,299**	**19,302**	**2,003**	**11.6%**	**61.0%**	**60.6%**	**61.4%**	**63.3%**
Core Total			**28,346**	**31,871**	**3,526**	**12.4%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends – adjusted 2011 cohorts

14.12 Byron Shire

Establishment Change 2012 to 2014

					2012 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2012	2014	Change	% Change	2012	2014	2012	2014
Drink	4123	Liquor Retailing	5	5	0	-2.2%	1.6%	1.6%	2.4%	2.3%
	4520	Pubs, Taverns and Bars	11	8	-3	-24.8%	3.4%	2.6%	6.4%	6.3%
Drink Total			**16**	**13**	**-3**	**-17.6%**	**5.0%**	**4.2%**	**8.8%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	11	12	1	13.2%	3.3%	3.8%	3.1%	3.0%
	900	Creative & Performing Arts Activities	76	75	-1	-1.5%	23.6%	23.7%	15.5%	14.1%
	911	Sports & Physical Recreation Activities	17	20	3	15.7%	5.3%	6.3%	6.8%	6.9%
	912	Horse & Dog Racing Activities	3	0	-3	-100.0%	1.0%	0.0%	2.2%	2.0%
	913	Amusement & Other Recreation Activities	18	14	-4	-21.3%	5.6%	4.5%	2.0%	2.0%
	920	Gambling Activities	3	3	0	2.9%	1.0%	1.0%	1.6%	1.5%
Entertainment Total			**128**	**124**	**-4**	**-3.1%**	**39.9%**	**39.3%**	**31.6%**	**29.9%**
Food	4511	Cafes and Restaurants	114	111	-3	-2.5%	35.4%	35.2%	34.7%	36.6%
	4512	Takeaway Food Services	63	67	4	6.3%	19.7%	21.3%	24.9%	24.8%
Food Total			**177**	**178**	**1**	**0.6%**	**55.1%**	**56.5%**	**59.6%**	**61.5%**
Core Total			**321**	**315**	**-6**	**-1.8%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends

Employment Change 2012 to 2014

					2012 - 2014		% Core NTE		% Core NTE Australia	
Sub-Sector	ANZSIC	Description	2012	2014	Change	% Change	2012	2014	2012	2014
Drink	4123	Liquor Retailing	133	158	25	18.8%	3.7%	4.0%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	167	196	29	17.4%	4.7%	4.9%	11.8%	10.8%
Drink Total			**299**	**354**	**55**	**18.4%**	**8.4%**	**8.9%**	**13.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	376	351	-25	-6.6%	10.6%	8.8%	6.7%	6.7%
	900	Creative & Performing Arts Activities	227	189	-38	-16.7%	6.4%	4.7%	4.1%	3.9%
	911	Sports & Physical Recreation Activities	440	397	-43	-9.8%	12.4%	9.9%	7.7%	7.7%
	912	Horse & Dog Racing Activities	6	0	-6	-100.0%	0.2%	0.0%	1.1%	1.4%
	913	Amusement & Other Recreation Activities	194	170	-24	-12.4%	5.5%	4.3%	1.9%	2.3%
	920	Gambling Activities	31	6	-25	-80.6%	0.9%	0.2%	1.9%	1.8%
	9534	Brothel Keeping & Prostitution	0	0	0	-	0.0%	0.0%	0.2%	0.2%
Entertainment Total			**1,274**	**1,114**	**-160**	**-12.6%**	**35.9%**	**27.9%**	**23.6%**	**23.9%**
Food	4511	Cafes and Restaurants	1,453	1,871	418	28.8%	41.0%	46.8%	37.7%	38.3%
	4512	Takeaway Food Services	522	658	136	26.1%	14.7%	16.5%	24.9%	25.0%
Food Total			**1,975**	**2,529**	**554**	**28.1%**	**55.7%**	**63.3%**	**62.6%**	**63.3%**
Core Total			**3,548**	**3,996**	**448**	**12.6%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends

14.13 Frankston

Establishment Change 2012 to 2014

Sub-Sector	ANZSIC	Description	2012	2014	2012 - 2014 Change	% Change	% Core NTE 2012	% Core NTE 2014	% Core NTE Australia 2012	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	6	5	-1	-16.7%	1.6%	1.4%	2.4%	2.3%
	4520	Pubs, Taverns and Bars	11	10	-1	-9.1%	3.0%	2.8%	6.4%	6.3%
Drink Total			**17**	**15**	**-2**	**-11.8%**	**4.6%**	**4.2%**	**8.8%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	8	8	0	0.0%	2.2%	2.2%	3.1%	3.0%
	900	Creative & Performing Arts Activities	57	47	-10	-17.5%	15.3%	13.1%	15.5%	14.1%
	911	Sports & Physical Recreation Activities	41	37	-4	-9.8%	11.0%	10.3%	6.8%	6.9%
	912	Horse & Dog Racing Activities	6	6	0	0.0%	1.6%	1.7%	2.2%	2.0%
	913	Amusement & Other Recreation Activities	8	6	-2	-25.0%	2.2%	1.7%	2.0%	2.0%
	920	Gambling Activities	11	11	0	0.0%	3.0%	3.1%	1.6%	1.5%
	9534	Brothel Keeping & Prostitution	3	3	0	0.0%	0.8%	0.8%	0.3%	0.3%
Entertainment Total			**133**	**118**	**-15**	**-11.3%**	**35.8%**	**32.8%**	**31.6%**	**29.9%**
Food	4511	Cafes and Restaurants	87	97	10	11.5%	23.4%	26.9%	34.7%	36.6%
	4512	Takeaway Food Services	135	130	-5	-3.7%	36.3%	36.1%	24.9%	24.8%
Food Total			**222**	**227**	**5**	**2.3%**	**59.7%**	**63.1%**	**59.6%**	**61.5%**
Core Total			**372**	**360**	**-12**	**-3.2%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends

Employment Change 2012 to 2014

Sub-Sector	ANZSIC	Description	2012	2014	2012 - 2014 Change	% Change	% Core NTE 2012	% Core NTE 2014	% Core NTE Australia 2012	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	24	35	11	45.8%	*	1.2%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	195	100	-95	-48.7%	*	3.5%	11.8%	10.8%
Drink Total			**219**	**135**	**-84**	**-38.4%**	*****	**4.7%**	**13.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	314	265	-49	-15.6%	*	9.2%	6.7%	6.7%
	900	Creative & Performing Arts Activities	232	127	-105	-45.3%	*	4.4%	4.1%	3.9%
	911	Sports & Physical Recreation Activities	615	521	-94	-15.3%	*	18.1%	7.7%	7.7%
	912	Horse & Dog Racing Activities	31	26	-5	-16.1%	*	0.9%	1.1%	1.4%
	913	Amusement & Other Recreation Activities	36	23	-13	-36.1%	*	0.8%	1.9%	2.3%
	920	Gambling Activities	83	70	-13	-15.7%	*	2.4%	1.9%	1.8%
	9534	Brothel Keeping & Prostitution	48	40	-8	-16.7%	*	1.4%	0.2%	0.2%
Entertainment Total			**1,360**	**1,073**	**-287**	**-21.1%**	*****	**37.2%**	**23.6%**	**23.9%**
Food	4511	Cafes and Restaurants	917	966	49	5.3%	*	33.5%	37.7%	38.3%
	4512	Takeaway Food Services	808	713	-95	-11.8%	*	24.7%	24.9%	25.0%
Food Total			**1,724**	**1,679**	**-45**	**-2.6%**	*****	**58.2%**	**62.6%**	**63.3%**
Core Total			**3,303**	**2,886**	**-417**	**-12.6%**	*****	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends

14.14 Gold Coast

Establishment Change 2012 to 2014

Sub-Sector	ANZSIC	Description	2012	2014	2012 - 2014 Change	2012 - 2014 % Change	% Core NTE 2012	% Core NTE 2014	% Core NTE Australia 2012	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	18	17	-1	-5.6%	0.6%	0.6%	2.4%	2.3%
	4520	Pubs, Taverns and Bars	124	116	-8	-6.5%	4.3%	4.1%	6.4%	6.3%
Drink Total			**142**	**133**	**-9**	**-6.3%**	**4.9%**	**4.7%**	**8.8%**	**8.6%**
Entertainment	4530	Clubs (Hospitality)	56	56	0	0.0%	1.9%	2.0%	3.1%	3.0%
	900	Creative & Performing Arts Activities	393	323	-70	-17.8%	13.6%	11.3%	15.5%	14.1%
	911	Sports & Physical Recreation Activities	320	353	33	10.3%	11.1%	12.3%	6.8%	6.9%
	912	Horse & Dog Racing Activities	71	56	-15	-21.1%	2.5%	2.0%	2.2%	2.0%
	913	Amusement & Other Recreation Activities	98	102	4	4.1%	3.4%	3.6%	2.0%	2.0%
	920	Gambling Activities	39	34	-5	-12.8%	1.4%	1.2%	1.6%	1.5%
	9534	Brothel Keeping & Prostitution	11	7	-4	-36.4%	0.4%	0.2%	0.3%	0.3%
Entertainment Total			**987**	**931**	**-56**	**-5.7%**	**34.2%**	**32.6%**	**31.6%**	**29.9%**
Food	4511	Cafes and Restaurants	1,130	1,179	49	4.3%	39.2%	41.2%	34.7%	36.6%
	4512	Takeaway Food Services	627	616	-11	-1.8%	21.7%	21.5%	24.9%	24.8%
Food Total			**1,757**	**1,796**	**39**	**2.2%**	**60.9%**	**62.8%**	**59.6%**	**61.5%**
Core Total			**2,886**	**2,860**	**-26**	**-0.9%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends

Employment Change 2012 to 2014

Sub-Sector	ANZSIC	Description	2012	2014	2012 - 2014 Change	2012 - 2014 % Change	% Core NTE 2012	% Core NTE 2014	% Core NTE Australia 2012	% Core NTE Australia 2014
Drink	4123	Liquor Retailing	300	284	-16	-5.3%	1.0%	1.0%	2.0%	2.0%
	4520	Pubs, Taverns and Bars	1,745	2,054	309	17.7%	6.0%	6.9%	11.8%	10.8%
Drink Total			**2,045**	**2,338**	**293**	**14.3%**	**7.0%**	**7.8%**	**13.7%**	**12.7%**
Entertainment	4530	Clubs (Hospitality)	1,909	1,806	-103	-5.4%	6.5%	6.0%	6.7%	6.7%
	900	Creative & Performing Arts Activities	1,707	1,555	-152	-8.9%	5.9%	5.2%	4.1%	3.9%
	911	Sports & Physical Recreation Activities	3,893	3,776	-117	-3.0%	13.3%	12.6%	7.7%	7.7%
	912	Horse & Dog Racing Activities	538	393	-145	-27.0%	1.8%	1.3%	1.1%	1.4%
	913	Amusement & Other Recreation Activities	796	743	-53	-6.7%	2.7%	2.5%	1.9%	2.3%
	920	Gambling Activities	1,225	1,100	-125	-10.2%	4.2%	3.7%	1.9%	1.8%
	9534	Brothel Keeping & Prostitution	91	64	-27	-29.7%	0.3%	0.2%	0.2%	0.2%
Entertainment Total			**10,158**	**9,437**	**-721**	**-7.1%**	**34.8%**	**31.6%**	**23.6%**	**23.9%**
Food	4511	Cafes and Restaurants	12,067	13,213	1,146	9.5%	41.4%	44.2%	37.7%	38.3%
	4512	Takeaway Food Services	4,908	4,898	-10	-0.2%	16.8%	16.4%	24.9%	25.0%
Food Total			**16,974**	**18,112**	**1,138**	**6.7%**	**58.2%**	**60.6%**	**62.6%**	**63.3%**
Core Total			**29,177**	**29,887**	**710**	**2.4%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: TBR Ref: W1/S9n, 2014 Update of NTE analysis applying ABS CABEE 2012/14 data trends

15. Appendix D – Glossary of Terms in the Report

A number of expressions, abbreviations and technical assumptions are used in the study.

Many of these are noted below in alphabetical order

ABS – The Australian Bureau of Statistics

ANZSIC – A 4 digit establishment classification (in the SIC system) for Australia and New Zealand.

Core and Non-Core - A distinction used in the NMI template to separate establishments that provide direct leisure services to NTE users from establishment that are ancillary or supporting to Core activities.

Core NTE Sub Sectors – sub segments of Core NTE. Drinks led; Entertainment led and Food led activities. In each case the sub segments are made up of a group of ANZSICs which are reported at Section 3.4.and more fully in Section 12 Appendix A.

Establishments – used to describe the activity of a single business entity and interchangeable with the the word 'Firm'. The methodology uses distinctions between firms present in annual time series with 0 (zero) employees;1 to 19 employees and with 20 employees and above.

ENTE – A more recent way of describing the NTE as the Evening and Night Time Economy to recognise differences in business activities pre and post-midnight. The distinction cannot be fully used in this study without further information from businesses.

LGA – Local Government Area - the third tier administrative entity of focus in this study.

NMI – The Night Mix Index which separates out the economic values of all the Core NTE activities

NTE – The Night Time Economy – applied here to a defined range of economic activities.

SA2 – The level 2 geographic building block used by the ABS that enables the aggregation of specific establishment activities to specifically defined geographies such as an LGA.

SIC – Standard Industrial Classification – a system of categorising establishment activity that is keyed to a similar template under the International SIC ((ISIC) categorisation in most developed countries and managed by individual national statistical agencies.

Reference Dates – In this report a year is always a financial year ending in June of the cited year.

Therefore 2009 in the tables refers to the Australian financial year July 2008 to June 2009.

WESA – West End Stress Area – the highest Core NTE concentration locus in London