Ingenium Research

Measuring the Australian Night Time Economy 2016-17

A project for the Council of Capital City Lord Mayors

Prepared by the team at Ingenium Research

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Glossary of terms

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

Term	Definition
Establishment(s)	Actively trading business(es) recorded in the Australian Bureau of Statistics Business Register (ABSBR) as at 30th June in the reporting year.
Employment	The number of employees associated with the establishment(s).
Turnover ($m)	The sales and service income generated by the establishment(s), exclusive of goods and service tax (GST).
LGA	Local Government Area – usually a city council or shire area. Each section in this report reviews the trend within the listed LGA. Please note that LGAs are not homogenous in terms of population size, geographic scale or density of establishments, which can make comparisons difficult.
LGSCN	Local Government Safe Cities Network – a committee operated by the Council of Capital Cities Lord Mayors (CCCLM).
NTE	Night Time Economy – economic activity which occurs at establishments primarily between the hours of 6 p.m. and 6 a.m. The NTE can be broken down into Core, Non-Core and Supply as per the table below.

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

Please note that within this document several charts present the trend in establishments, employment and turnover in an indexed manner, so that the quantum of the figures is expressed such that the individual trends can be compared. Figures are indexed to 2009 (with 2009 equal to 1.0) with performance in subsequent years shown relative to this starting point.

1. The Australian NTE

1.1. Introduction

The Council of Capital City Lord Mayors (CCCLM) has developed a globally unique statistical tool which captures the scale, diversity and direction of the development of local, state and federal Night Time Economy (NTE) activity in Australia.

Consistency of local comparative performance measurement has been a hallmark of the approach of the work commissioned by the Local Government Safe Cities Network (LGSCN[1]) over the last eight[2] years and these outcomes can be accessed by participating local government areas (LGAs) that sign up to the use of CCCLM's NTE Profiler tool.

In this latest iteration the scope of this tool has been extended beyond the current LGSCN members to examine and evidence data for 88 LGAs[3]. This includes those LGAs that are among the top 21 growing cities in Australia as well as a number of LGAs selected on the basis of their population or because they are known to be working on their NTE strategy.

This report provides a summary of key findings from the updated tool covering the 2016 and 2017 financial years. This is presented firstly as an overview of NTE performance at a federal and state/territory level, followed by an executive summary for each state and each of the twelve current LGA members of the LGSCN. These summaries are provided alphabetically by state (denoted by the title and the Australian map in the document header), from Australian Capital Territory through to Western Australia. More detailed tables around the Core NTE for these areas and the trend over time from 2009 to 2017 are available in the appendix (Section 10.3, page 33).

1.2. The Australian NTE

The NTE in Australia continues to be a significant contributor to the economy as a whole, accounting for 17% of all establishments in both 2016 and 2017 across the Core, Non-Core and Supply NTE sectors. Of the 2.2 million businesses in Australia in 2017, the NTE consists of 374,835 establishments and grew at a faster rate between 2016 and 2017 than the total economy (3.4% compared to 3.1%). These NTE establishments employ a total of three million people (growing 1.9% from 2016) and generate almost $715 billion in turnover (an increase of 2.7% since 2016 – which is an above inflation rise[4]).

In 2017, the Core NTE comprises 106,000 establishments, employing over 1,087,000 people and generating nearly $127 billion in turnover, representing 5%, 9% and 4% of the total economy respectively. The Core NTE in Australia continues to grow at a faster rate than that of wider economy as demonstrated in Figure 1 below.

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[1] Previously known as the National Local Government Drug and Alcohol Advisory Committee (NLGDAAC).
[2] Excluding 2010 as the original study reviewed trends between 2009 and 2011 only.
[3] A full list of the 88 areas analysed and their Core NTE establishment density ranking is provided in the appendix (Section 10.4, p21).
[4] Compared to an inflation rate of 1.9% (Reserve Bank of Australia Consumer Price Index June 2016-17).

Figure 1: Comparing establishments, employment and turnover ($m) in Australia – indexed to 2009
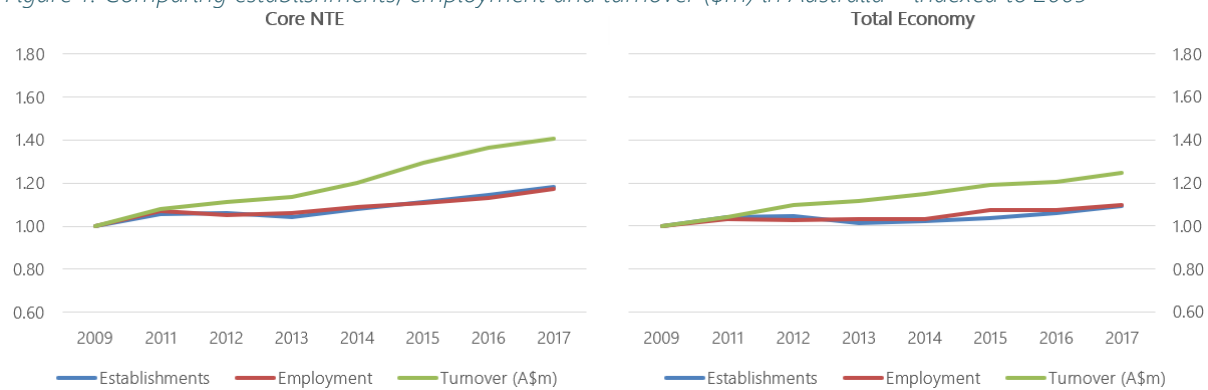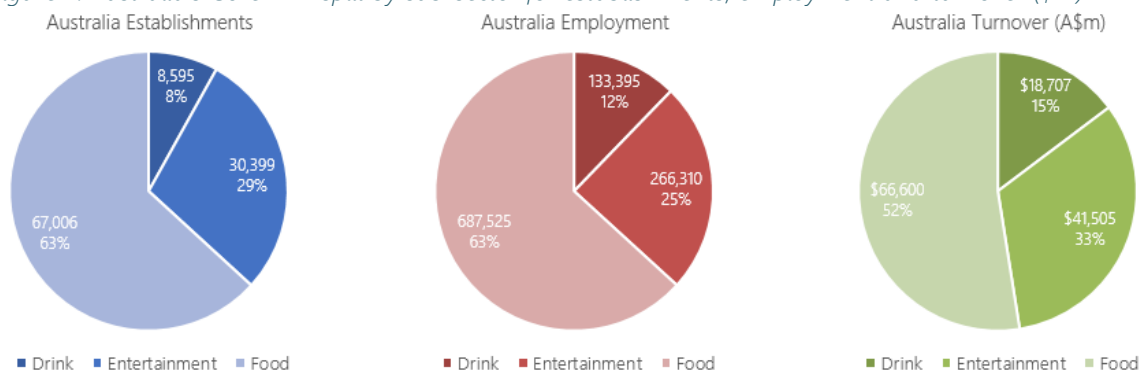

Source: Based on Australian Bureau of Statistics CABEE 2013-2017 dataset, Ref: WTS1/2_Aus

Between 2016 and 2017, Core NTE:

- establishments increased by 3.2% (compared to 3.1% in the wider economy),
- employment increased by 3.7% (compared to 2.1%) and
- turnover increased by 3.1%, which was slightly less than witnessed in the wider economy (3.5%).

Food establishments remain the key driver behind the Core NTE's growth, accounting for over 67,000 (or 63%) of the sector in 2017. This share has grown consistently over the past eight years rising from 57% in 2009 to its peak in 2017. Drink and Entertainment establishments have also increased over the same period, albeit at a slower rate compared to Food, leading to their share of Core NTE establishments declining. Despite this, both Drink and Entertainment maintain a strong Core NTE market share in terms of turnover (15% and 33% respectively), due to establishments in these sub-sectors having a higher average turnover per establishment than those in Food.

Figure 2: Australia's Core NTE split by sub-sector for establishments, employment and turnover ($m)

Source: Based on Australian Bureau of Statistics CABEE 2013-2017 dataset, Ref: WTS1/1_Aus

1.3. The Australian NTE in the states and territories

Of all the states and territories, New South Wales and Victoria are the largest contributors to the Australian Core NTE across establishments (34% and 28% respectively), employment (30% and 25%) and turnover (30% and 26%) as shown in Table 1. While New South Wales has the largest Core NTE, it has grown at a slower rate than that of Australia across all the key metrics. All states have witnessed growth in their Core NTE, particularly Victoria and Queensland who have grown at a quicker rate than the national average.

While the territories tend to have smaller NTEs, they look to be increasing their establishment base at a much swifter rate, particularly the Australian Capital Territory, whose growth is matched in employment and turnover. Conversely, Northern Territory has remained fairly static in terms of employment and is the only area to witness a drop in its Core NTE turnover (-1.5%). Across the board it is clear the Core NTE continues to be a growth sector with positive change occurring across nearly every measured factor.

Table 1: Core NTE by state/territory in 2017 with change from 2016-17

State/Territory	Establishments Number		Establishments Change 16-17	Employment Number		Employment Change 16-17	Turnover ($m) Number		Turnover ($m) Change 16-17
New South Wales	36,196	⬆	3.1%	329,355	⬆	2.4%	$38,656	⬆	1.7%
Victoria	29,857	⬆	3.4%	270,760	⬆	4.5%	$32,660	⬆	3.9%
Queensland	19,117	⬆	3.8%	221,645	⬆	5.0%	$25,276	⬆	4.1%
Western Australia	9,953	⬆	3.2%	116,935	⬆	4.8%	$13,609	⬆	4.4%
South Australia	6,441	⬆	2.4%	76,815	⬆	0.6%	$8,594	⬆	0.7%
Tasmania	1,960	⬆	3.6%	23,330	⬆	8.3%	$2,645	⬆	5.4%
Australian Capital Territory	1,752	⬆	4.0%	29,695	⬆	6.1%	$3,200	⬆	5.1%
Northern Territory	754	⬆	4.7%	18,700	⬆	0.1%	$2,172	⬇	-1.5%
Australia	106,000	⬆	3.2%	1,087,230	⬆	3.7%	$126,811	⬆	3.1%

Source: Based on Australian Bureau of Statistics CABEE 2013-2017 dataset, Ref: WTS2/State_Core_NTE

This picture is slightly different when looking at the individual sub-sectors within the Core NTE, as shown in Table 2, Table 3 and Table 4 over leaf.

As is the case with Australia as a whole, the Core NTE growth is primarily driven by the Food sub-sector, which has witnessed establishment growth across every state and territory of between 3-5%. By comparison growth in the Drink sub-sector is more modest in the larger states and has even declined in some areas, particularly South Australia and Northern Territory. This is similar for Entertainment, where there has been relatively good growth in establishments but modest growth in employment and turnover. Tasmania again shows the highest increase in turnover within the Food and Entertainment sub-sectors. Its decline in Drinks turnover suggests a transition with which establishments and employment have not yet fully processed.

Table 2: Drink by state/territory in 2017 with change from 2016-17

State/Territory	Establishments Number		Change 16-17	Employment Number		Change 16-17	Turnover ($m) Number		Change 16-17
New South Wales	2,910	⬆	1.5%	43,560	⬆	1.0%	$6,507	⬆	1.1%
Victoria	2,371	⬆	1.4%	28,080	⬆	0.8%	$4,261	⬆	1.5%
Queensland	1,143	⬇	-0.1%	24,335	⬆	4.3%	$2,836	⬆	3.8%
Western Australia	980	⬆	2.5%	17,275	⬆	2.1%	$2,635	⬆	6.6%
South Australia	792	⬇	-0.4%	11,935	⬇	-4.2%	$1,516	⬇	-0.3%
Tasmania	234	⬆	4.5%	3,635	⬆	5.5%	$435	⬇	-5.8%
Australian Capital Territory	110	⬆	10.0%	2,150	⬇	-2.3%	$274	⬆	0.3%
Northern Territory	50	➡	0.0%	2,415	⬇	-6.4%	$243	⬇	-6.4%
Australia	8,595	⬆	1.3%	133,395	⬆	1.1%	$18,707	⬆	1.9%

Table 3: Entertainment by state/territory in 2017 with change from 2016-17

State/Territory	Establishments Number		Change 16-17	Employment Number		Change 16-17	Turnover ($m) Number		Change 16-17
New South Wales	11,029	⬆	2.7%	90,060	⬇	-1.0%	$13,188	⬇	-1.6%
Victoria	8,262	⬆	3.7%	66,675	⬆	4.5%	$11,350	⬆	3.1%
Queensland	5,628	⬆	3.7%	57,100	⬆	3.0%	$8,858	⬆	1.6%
Western Australia	2,640	⬆	2.5%	19,465	⬆	0.4%	$3,206	⬇	-2.1%
South Australia	1,671	⬆	2.4%	14,785	⬇	-0.7%	$2,226	⬇	-1.8%
Tasmania	522	⬆	1.2%	5,175	⬆	8.8%	$804	⬆	6.7%
Australian Capital Territory	441	⬆	2.8%	6,920	⬆	2.4%	$928	⬆	0.1%
Northern Territory	231	⬆	4.5%	6,130	⬇	-4.2%	$945	⬇	-5.9%
Australia	30,399	⬆	2.8%	266,310	⬆	1.5%	$41,505	⬆	0.4%

Table 4: Food by state/territory in 2017 with change from 2016-17

State/Territory	Establishments Number		Change 16-17	Employment Number		Change 16-17	Turnover ($m) Number		Change 16-17
New South Wales	22,257	⬆	3.5%	195,735	⬆	4.4%	$18,960	⬆	4.3%
Victoria	19,224	⬆	3.6%	176,005	⬆	5.1%	$17,049	⬆	5.1%
Queensland	12,346	⬆	4.2%	140,205	⬆	5.9%	$13,582	⬆	5.9%
Western Australia	6,333	⬆	3.6%	80,190	⬆	6.5%	$7,768	⬆	6.5%
South Australia	3,978	⬆	3.1%	50,095	⬆	2.2%	$4,853	⬆	2.2%
Tasmania	1,204	⬆	4.6%	14,515	⬆	8.7%	$1,406	⬆	8.7%
Australian Capital Territory	1,201	⬆	3.9%	20,625	⬆	8.4%	$1,998	⬆	8.4%
Northern Territory	473	⬆	5.3%	10,155	⬆	4.6%	$984	⬆	4.7%
Australia	67,006	⬆	3.6%	687,525	⬆	5.2%	$66,600	⬆	5.2%

Source: Based on Australian Bureau of Statistics CABEE 2013-2017 dataset, Ref: WTS2/State_Core_NTE

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2. The NTE in Australian Capital Territory (ACT)
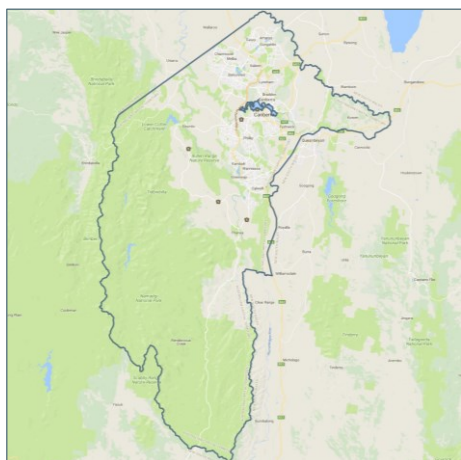
ACT's Core NTE is driven by an above average concentration of Food establishments, which has grown consistently over the last eight years.

Food establishments in ACT represent 69% of the Core NTE, rising from 62% in 2009. It is the main reason for growth within the Core NTE, with the Drink (6% of Core NTE) and Entertainment (25%) sub-sectors maintaining around the same number of establishments that were present in 2009.

The Core NTE has seen growth (see Table 5) in establishments (+4.0%), employment (+6.1%) and turnover (+5.1%), that exceeds growth rates observed at the national level and are some of the strongest Core NTE growth rates in the country.

Table 5: Core NTE summary for Australian Capital Territory

Measure	Core NTE 2017		% Change 16-17	% Total Economy ACT	AUS
Establishments	1,752	⬆	4.0%	6.4%	4.7%
Employment	29,695	⬆	6.1%	13.4%	8.9%
Turnover ($m)	$3,200	⬆	5.1%	5.9%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_State

As noted above, most of this growth can be attributed to Food, with establishments (+3.9%), employment (+8.4%) and turnover (+8.4%) all increasing between 2016 and 2017, continuing the robust growth shown since 2009 (Figure 3).

In addition to having a higher concentration of Food compared to the national average, the structure of the sub-sector is also quite different. There is a much higher presence of cafes and restaurants in ACT than in Australia as a whole (81% compared to 66%) as demonstrated in Figure 4.
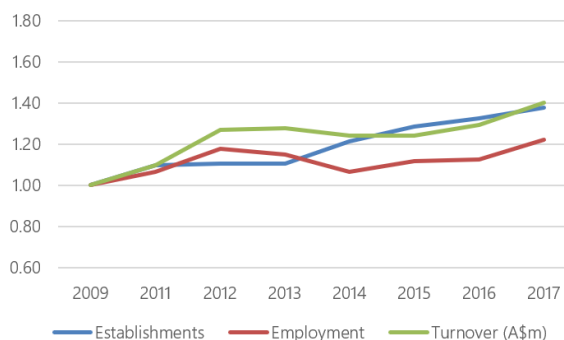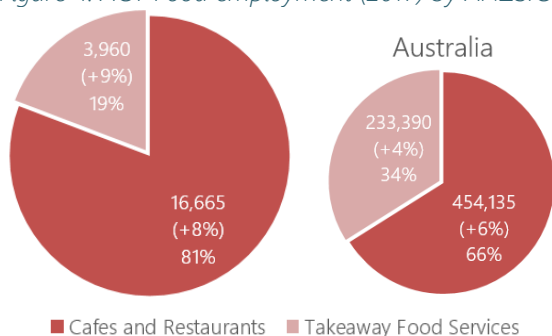
Figure 3: Trend in ACT's Food sub-sector

*Figure 4: ACT Food employment (2017) by ANZSIC*

3. The NTE in New South Wales (NSW)

NSW is the largest contributor to Australia's Core NTE, accounting for 34% of Core NTE establishments and 30% of Core NTE employment and turnover.

The distribution of NSW's Core NTE is broadly similar to that of Australia, which is not unsurprising given it is major contributor to the Australian NTE. Approximately 8% of establishments are Drink based (compared to 8% in Australia), 30% are in Entertainment (29%) and 62% are in Food (63%).

*Figure 5: NSW's establishments by sub-sector*
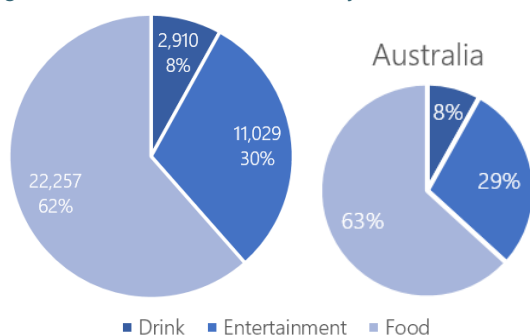
Food establishments in NSW increased by 3.5% over the 2016 to 2017 period (compared to +3.6% nationally), which led to similar expansions in employment (+4.4% compared to +5.2% nationally) and turnover (+4.3% compared to +5.2%).

Whilst Food is the key driver of the Core NTE it is also worth noting that NSW possesses the largest Drink and Entertainment sub-sectors in Australia. Both of these sectors have remained fairly static in size between 2016 to 2017, but this is also the case nationally.

Between 2016 and 2017 the Core NTE in NSW grew across establishments (+3.1%), employment (+2.4%) and turnover (+1.7%) (see Table 6), although the growth in these key metrics occurred at a slower rate than observed at the national level (+3.2% in establishments, +3.7% in employment and +3.1% in turnover). While Core NTE growth in NSW is slightly slower than that of Australia, the main driver behind this growth is common; namely increases in the size of the Food sub-sector across all key metrics.

Figure 6: Trend in NSW's Core NTE
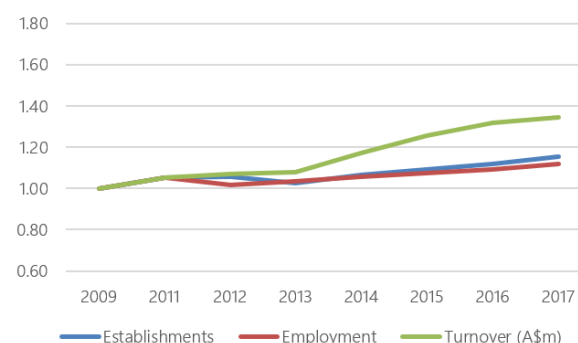
In summary, NSW's Core NTE is the largest amongst all the states and territories but has experienced slower than average growth in recent years compared to the Core NTE in Australia as a whole. It's Core NTE distribution is similar to that of Australia with around 62% of establishments focused on Food activities, which continue to grow at a quicker pace than that of Drink and Entertainment activities.

Table 6: Core NTE summary for New South Wales

Measure	Core NTE 2017	% Change 16-17	% Total Economy NSW	AUS
Establishments	36,196	⬆ 3.1%	4.8%	4.7%
Employment	329,355	⬆ 2.4%	8.5%	8.9%
Turnover ($m)	$38,656	⬆ 1.7%	3.8%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_State

3.1. NSW: City of Newcastle
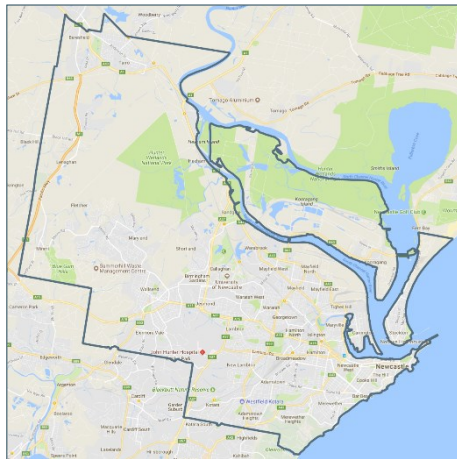
Newcastle has the seventh largest Drink sub-sector of the 88 LGAs analysed measured by the number of establishments.

Newcastle's Core NTE represents an above average proportion of its total economy compared to that of NSW and Australia (see Table 7). In addition, it has grown at a much faster rate between 2016 and 2017 than NSW across establishments (8.4% compared to 3.1% in NSW), employment (7.8% compared to 2.4%) and turnover (7.8% compared to 1.7%).

Newcastle has a higher than average concentration of Drink establishments (14% of the Core NTE) compared to NSW (8%) and Australia (8%), driven primarily by pubs, taverns and bars as opposed to liquor retailing.

Table 7: Core NTE summary for City of Newcastle

Measure	Core NTE 2017	% Change 16-17	% Total Economy LGA	NSW	AUS
Establishments	822	⬆ 8.4%	6.3%	4.8%	4.7%
Employment	12,890	⬆ 7.8%	13.4%	8.5%	8.9%
Turnover ($m)	$1,432	⬆ 7.8%	5.4%	3.8%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

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

While Drink looks to be stronger than average in Newcastle, it should also be noted that the Food sub-sector has grown by over 10% in terms of establishments, employment and turnover between 2016 and 2017, indicating a recent shift in NTE focus for the LGA.

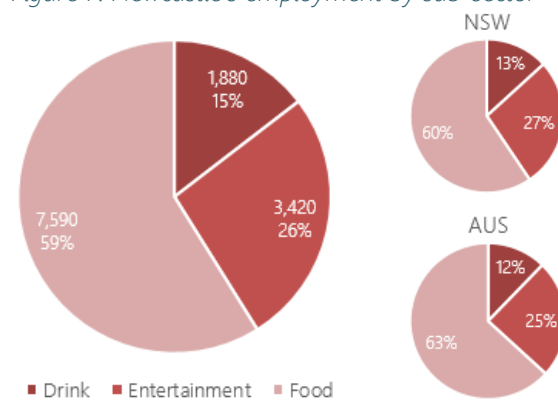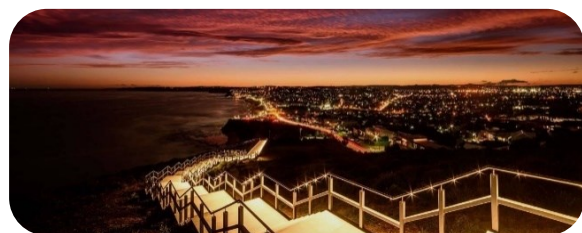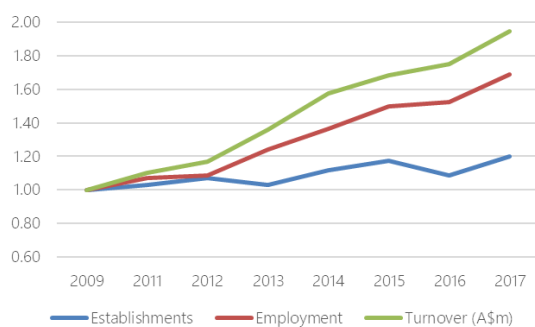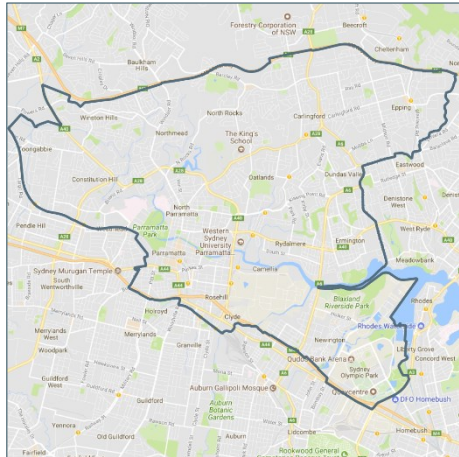*Figure 7: Newcastle's employment by sub-sector*

Figure 8: Trend in Newcastle's Food sub-sector

3.2. NSW: City of Parramatta

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

Parramatta has a particularly strong Food sub-sector in terms of establishments, making up 77% of the Core NTE, which is much higher compared to NSW (61%) and Australia (63%). Employment (66%) and turnover (48%) are lower in this sub-sector, however, suggesting Paramatta has a higher proportion of smaller establishments.

Parramatta's boundary was recently changed in 2016, with parts of the previous boundary being combined with parts of The Hills Shire, Auburn City, Holroyd City and Hornsby Shire, meaning a slight disconnect in figures between 2015 and 2016.

Table 8: Core NTE summary for City of Parramatta

Measure	Core NTE 2017		% Change 16-17	% Total Economy		
				LGA	NSW	AUS
Establishments	1,171	⬆	2.9%	4.8%	4.8%	4.7%
Employment	8,075	⬆	2.6%	7.9%	8.5%	8.9%
Turnover ($m)	$1,034	⬆	1.3%	3.5%	3.8%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

Over the course of 2016 to 2017, the number of establishments in all three sub-sectors (Food, Drink and Entertainment) grew in Parramatta in terms of the number of establishments, employment and turnover. Although this was at a slightly slower rate than witnessed in these sub-sectors in NSW.

While the Food sub-sector is the primary driver behind Parramatta's Core NTE performance (48% of Core NTE turnover or $496m), it has remained static over the past few years in terms of growth, as explored in Figure 9.

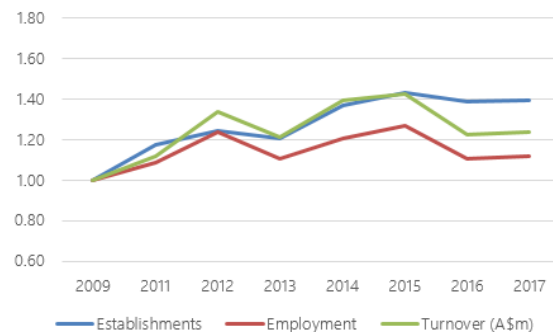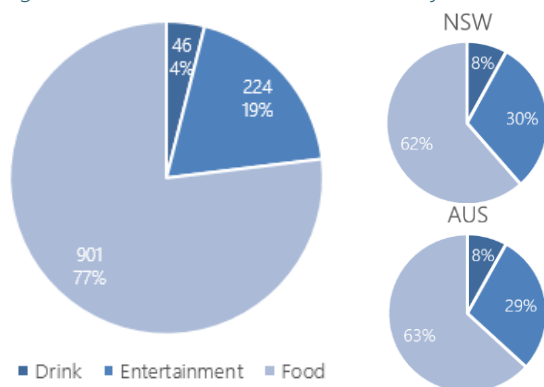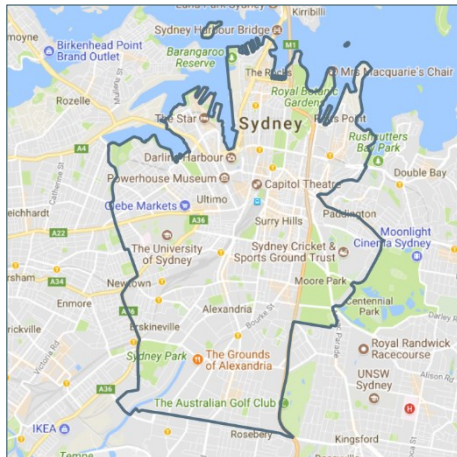*Figure 9: Trend in Parramatta's Food sub-sector*

Figure 10: Parramatta establishments by sub-sector

3.3. NSW: City of Sydney

Sydney has the strongest and most concentrated NTE in Australia, with over 180 Core NTE establishments per km².

Sydney's Core NTE is a clear strength for the LGA (Table 9) as it represents almost 11% of all of Sydney's establishments. In terms of establishments per km², it is ranked:

- first in Drink (22 per km²),
- second in Entertainment (33 per km²) and
- first in Food (128 per km²).

Each of these sub-sectors experienced continued growth between 2016 and 2017, suggesting these positions are likely to be maintained in the future. Overall growth in turnover has occurred much faster than inflation (6.3% compared to 1.9%[4]).

Table 9: Core NTE summary for City of Sydney

Measure	Core NTE 2017		% Change 16-17	% Total Economy		
				LGA	NSW	AUS
Establishments	4,872	⬆	1.8%	10.8%	4.8%	4.7%
Employment	35,580	⬆	6.2%	7.8%	8.5%	8.9%
Turnover ($m)	$4,059	⬆	6.3%	4.1%	3.8%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

Food remains Sydney's strongest NTE sub-sector, accounting for 70% of all NTE establishments in 2017, which is well above the averages for NSW (61%) and Australia (63%).

The greatest growth over this period was in the Drink sub-sector, with increases in establishments (+4.9%), employment (+8.7%) and turnover (+6.5%), well above the NSW and national averages. This growth comes off the back of decline between 2014 and 2015 (-8%) following the introduction of the lockouts in February 2014.

Entertainment in Sydney is growing at a faster rate than that of NSW in terms of employment (+2.4% compared to -1.0%) and turnover (+5.0% compared to -1.6%). This is driven primarily by strong performance in creative and performing arts, consisting of over 460 establishments (+4% since 2016) employing 3,100 people (+12% since 2016) and generating nearly $572m in turnover for the LGA (+20% since 2016). Should this growth continue it may help Sydney to first place in terms of the density of Entertainment establishments.

Figure 11: Trend in Sydney's Core NTE
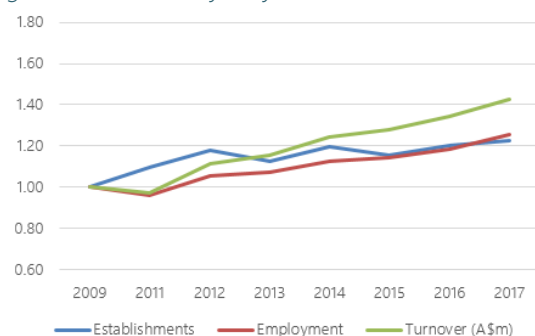
4. The NTE in Northern Territory (NT)

The Core NTE in NT is smaller than other states and territories, but it represents a higher proportion of the total economy across all key metrics.

The Core NTE represents approximately 5.2% of all establishments in NT (compared to 4.7% nationally), in addition to 13.9% of employment (8.9% nationally) and 6.6% of turnover (3.8%), highlighting that this is an important sector for the NT's total economy (Table 10).

Figure 12: Core NTE growth 2016-2017 in NT

NT has increased its Core NTE establishments at the quickest rate of all states and territories in Australia between 2016 and 2017 (+4.7%). Unfortunately, this has not transferred through to employment, which has remained relatively static (+0.1%), or turnover which has seen a small decline (-1.5%). This suggests that the newer firms are likely to be very small in nature and that increases may follow in future years.

The main drivers of the employment and turnover change are the Drink and Entertainment sub-sectors which have both observed losses from 2016 to 2017.

Whilst the Drink sub-sector has not lost any establishments since 2016, its employment and turnover have both decreased by 6.4%. Entertainment has increased in establishments (+4.5%) but decreases in employment and turnover (-4.2% and -5.9%).

These decreases in employment and turnover have been effectively negated through strong growth in the Food sub-sector across establishments (+5.3%), employment (+4.6%) and turnover (+4.7%).

Figure 13: Sub-sector NTE growth 2016-2017 in NT
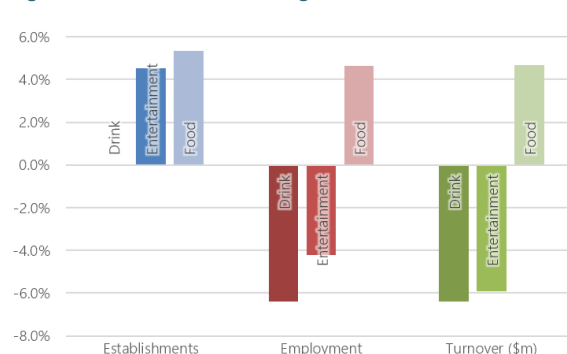
In summary, NT's Core NTE is relatively small but particularly important in terms of its contributions to the wider economy within the territory (13.9% of all employment in NT). It has seen many new establishments added in the last year, but this has yet to impact on employment and turnover, which have seen losses in Drink and Entertainment, but have been maintained due to a growing Food sub-sector.

Table 10: Core NTE summary for Northern Territory

Measure	Core NTE 2017	% Change 16-17	% Total Economy NT	AUS
Establishments	754	⬆ 4.7%	5.2%	4.7%
Employment	18,700	⬆ 0.1%	13.9%	8.9%
Turnover ($m)	$2,172	⬇ -1.5%	6.6%	3.8%

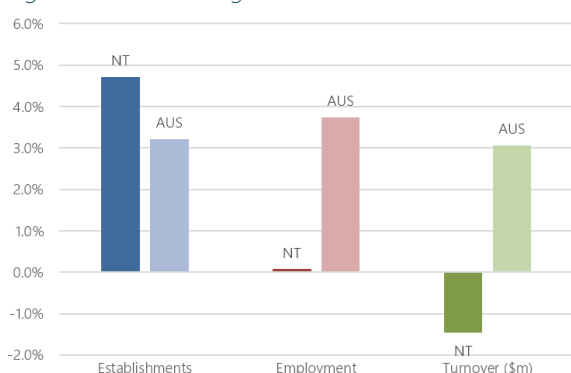*Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_State*

4.1. NT: City of Darwin

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

The structure of Darwin's Core NTE is slightly different to that of NT and Australia, with less reliance on Drink (4% of Core NTE establishments) and Entertainment (27%) and more of an emphasis on Food establishments (69%).

This is also supported when looking at growth rates by sub-sector, with Drink and Entertainment witnessing slight declines between 2016 and 2017 across establishments (-5% and -3% respectively), employment (-4% and -2%) and turnover (-4% and -1%). This suggests a potential shift towards an even greater emphasis on Food in the future.

Table 11: Core NTE summary for City of Darwin

Measure	Core NTE 2017	% Change 16-17	% Total Economy LGA	NT	AUS
Establishments	409	⬆ 3.5%	5.8%	5.2%	4.7%
Employment	5,640	⬆ 6.6%	11.5%	13.9%	8.9%
Turnover ($m)	$627	⬆ 5.9%	4.4%	6.6%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

This shift seems more likely when considering that Darwin experienced strong growth in the Food sub-sector over the same period in terms of establishments (+7%), employment (+13%) and turnover (+13%).

Establishment growth in Food over this period is driven by an increase in takeaway food services (+10%), with a lower growth in cafe and restaurant establishments (+4%). Turning to employment and turnover though, it is cafes and restaurants driving the growth (+14% employment, +15% turnover).

Figure 14: Darwin's Food Employment by type

Figure 15: Trend in Darwin's Food sub-sector
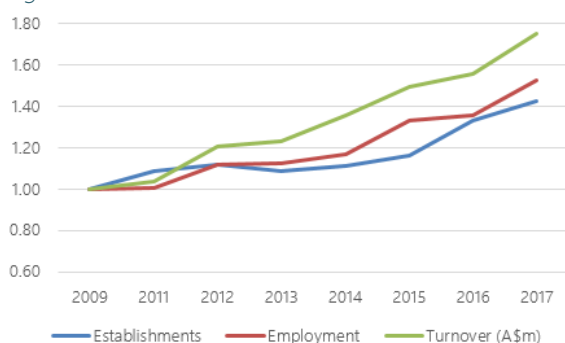
5. The NTE in Queensland (QLD)

QLD has the third largest Core NTE in Australia across all key metrics and is growing at faster pace than that of VIC and NSW.

The Core NTE in QLD consists of over 19,100 establishments, employing over 221,600 people and generating $25.3bn in turnover. Each of these key metrics have grown in the last year by 3.8%, 5.0% and 4.1% respectively, which is quicker than the national average (+3.2%, +3.7% and +3.1%).
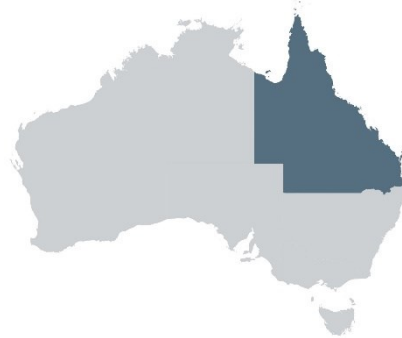
Figure 16: Trend in QLD's Core NTE

The structure of the Core NTE in QLD is similar to that of Australia, although with slightly less reliance on Drink establishments (6% of Core NTE compared to 8% nationally) and more reliance on Food (65%, 63% nationally).

As with most other states and territories, growth in the Core NTE is primarily due to an increase in the Food sub-sector, which has increased in establishments (+4.2%), employment (+5.9%) and turnover (+5.9%) between 2016 and 2017.

The state's Core NTE has also been assisted by strong growth in Entertainment from 2016 to 2017 that has occurred at almost double the national average for employment (+3.0% compared to +1.5% in Australia) and turnover (+1.6% compared to +0.4%).

The same is also true of the Drink sub-sector, which experienced particularly strong growth across employment (+4.3%) and turnover (+3.8%), although a small decline in establishments (-0.1%).

Figure 17: Growth in QLD's Entertainment 2016-17
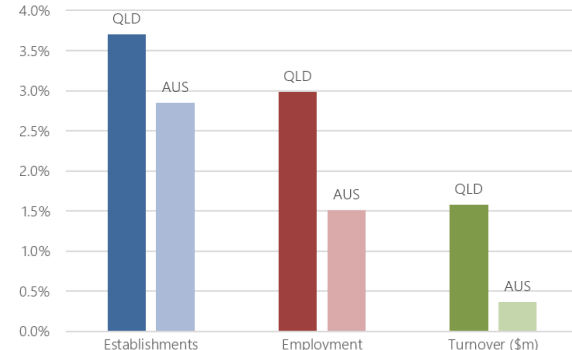
In summary, QLD's Core NTE is one of the largest in Australia and is growing at a rate quicker than Australia, NSW and VIC. Its Core NTE structure is similar to that of Australia, with slightly less reliance on Drink and more emphasis on Food. Between 2016 and 2017 QLD's Core NTE has grown in employment and turnover across all Core NTE sub-sectors. If this trend continues, its size could rival that of VIC and NSW.

Table 12: Core NTE summary for Queensland

Measure	Core NTE 2017	% Change 16-17	% Total Economy QLD	AUS
Establishments	19,117	⬆ 3.8%	4.4%	4.7%
Employment	221,645	⬆ 5.0%	9.2%	8.9%
Turnover ($m)	$25,276	⬆ 4.1%	4.0%	3.8%

*Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_State*

5.1. QLD: Brisbane City Council

Brisbane has the largest Food and Entertainment sub-sectors across the 88 LGAs, as well as the largest Core NTE.

Brisbane naturally ranks highly in all three NTE sub-sectors, due to its geographical size, which makes comparisons to other LGAs difficult and leads to a much lower concentration per km² than that of other areas.

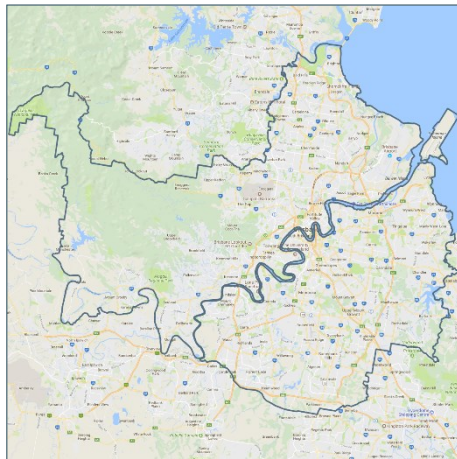Brisbane's proportional split in Food, Drink and Entertainment is similar to QLD and Australia in establishments, employment and turnover. While similar in this vein, Brisbane's wider economy has more of a reliance on the Core NTE than that of QLD and Australia, as demonstrated in Table 13 below, with the Core NTE representing a higher than average proportion of the total economy.

Table 13: Core NTE summary for Brisbane City Council

Measure	Core NTE 2017	% Change 16-17	% Total Economy LGA	% Total Economy QLD	% Total Economy AUS
Establishments	6,196	🔼 3.8%	5.0%	4.4%	4.7%
Employment	69,725	🔼 5.6%	10.8%	9.2%	8.9%
Turnover ($m)	$7,652	🔼 5.3%	4.2%	4.0%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

All of Brisbane's Core NTE sub-sectors (Drink, Entertainment and Food) grew between 2016 and 2017 across all measures, although some sub-sectors grew quicker than others.

The largest percentage growth was witnessed in Food employment (+7%) and turnover (+7%), representing an addition of 3,190 jobs and $317m in turnover to the sub-sector. As highlighted in Figure 18, this trend has been fairly continual for almost a decade and doesn't show any signs of slowing, meaning Food will remain key.

Figure 18: Trend in Brisbane's Food sub-sector
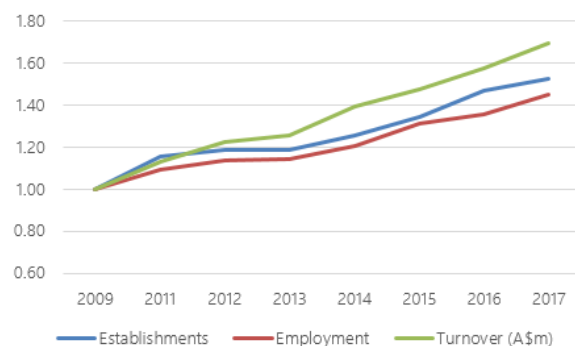
Figure 19: Brisbane's establishments by sub-sector
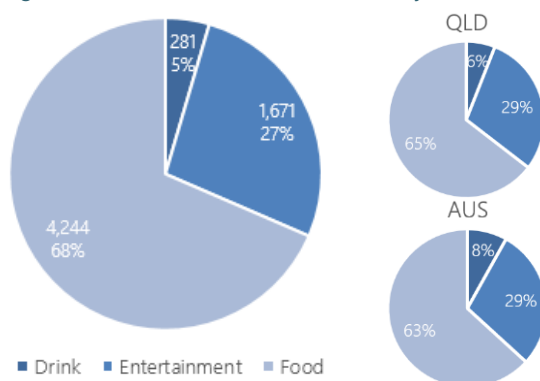
5.2. QLD: City of Gold Coast
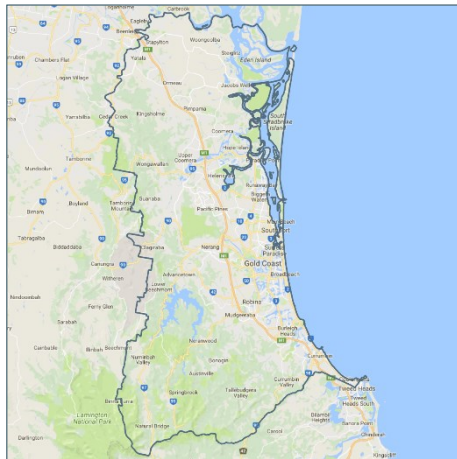
Gold Coast has the third largest Core NTE of all 88 LGAs analysed and the second largest Entertainment sub-sector.

In a similar fashion to Brisbane, Gold Coast's large physical size means it naturally ranks highly, particularly in Food (sixth) and Entertainment, but lower in terms of density. Entertainment represents a larger proportion of Core NTE establishments (32%) than it does in the state (29%) and Australia (29%) and this is also true when it comes to employment and turnover.

The Core NTE has grown across most measures over the 2016 to 2017 period and at a faster rate than witnessed in QLD and Australia. This growth has not occurred across all sub-sectors though, with Drink declining by 7% in establishments.

Table 14: Core NTE summary for City of Gold Coast

Measure	Core NTE 2017		% Change 16-17	% Total Economy		
				LGA	QLD	AUS
Establishments	3,216	⬆	4.1%	5.0%	4.4%	4.7%
Employment	34,530	⬆	6.9%	11.3%	9.2%	8.9%
Turnover ($m)	$3,849	⬆	7.3%	4.4%	4.0%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

Entertainment and Food have both experienced growth in employment and turnover between 2016 and 2017. While Entertainment has grown at a quicker rate than QLD and Australia between 2016 and 2017 its growth since 2012 is relatively static. It has not grown as quickly as the Food sub-sector as demonstrated in Figure 20 and Figure 21. Over the 2016 and 2017 period employment in Food has increased by 10% (+1,935 jobs) compared to an increase of 5% in Entertainment (+500 jobs).

Figure 20: Trend in Gold Coast's Entertainment

Figure 21: Trend in Gold Coast's Food sub-sector

6. The NTE in South Australia (SA)

SA has a modestly sized Core NTE, which has a greater focus on Drink activities than other states and less reliance on Entertainment activities.

SA's Core NTE employs almost 77,000 people across 6,441 establishments and generated $8.6bn in turnover in 2017 (Table 15). Almost 12,000 of these employees (16%) are based in Drink establishments, which represents a much higher proportion than seen in the Core NTE nationally (12%).

Figure 22: SA's employment by sub-sector

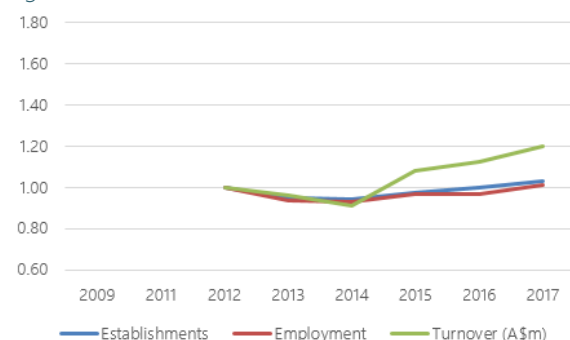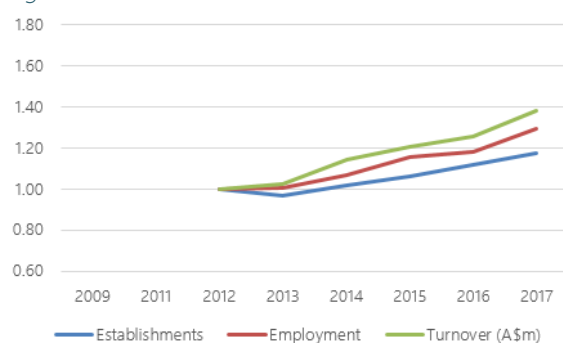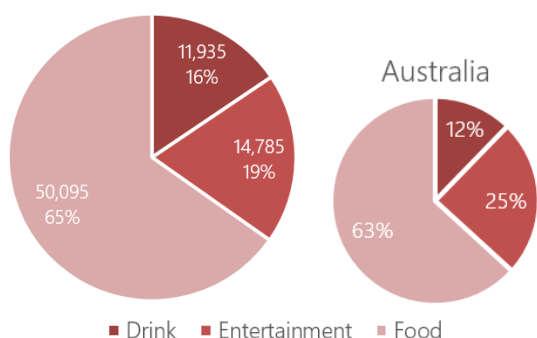While the Drink sub-sector represents an above average concentration of Core NTE activities in SA, it has observed little to no change in its establishment base over the last eight years, along with a slow reduction in employment and turnover.

Entertainment has also experienced a decline in establishments over the 2009 to 2015 period but looks to be resurging in 2016 and 2017. Food on the other hand is the main driver for growth from 2016 to 2017, having increased in establishments (+3.1%), employment (+2.2%) and turnover (+2.2%).

Entertainment represents a much lower proportion of employment in SA's Core NTE (19%) compared to Australia (25%) whereas the concentration of Food based establishments is broadly similar, albeit slightly higher (65% in SA compared to 63% in Australia).

Growth in the Core NTE in SA has been relatively static over the 2016 to 2017 period, with establishments increasing by 2.4% (below the national rate of +3.2%) and employment and turnover increasing by 0.6% and 0.7% respectively.

Figure 23: Trend in SA's Drink sub-sector
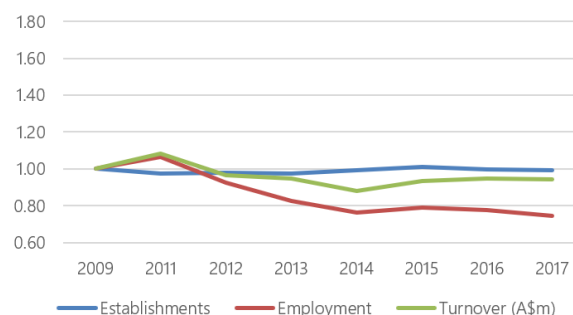
In summary, the Core NTE in SA is slightly different to that of Australia, with more emphasis on Drink and less focus on Entertainment. These two sectors have witnessed relatively static growth between 2016 and 2017 and in the period prior to this, whilst Food has continued to rise. This could signify a potential shift in NTE focus from Drink to Food based activities or could simply suggest a move to smaller Drinks venues given the number of establishments has remained effectively unchanged over the last eight years.

Table 15: Core NTE summary for South Australia

Measure	Core NTE 2017	% Change 16-17	% Total Economy	
			SA	AUS
Establishments	6,441	⬆ 2.4%	4.4%	4.7%
Employment	76,815	⬆ 0.6%	9.3%	8.9%
Turnover ($m)	$8,594	⬆ 0.7%	3.9%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_State

6.1. SA: City of Adelaide
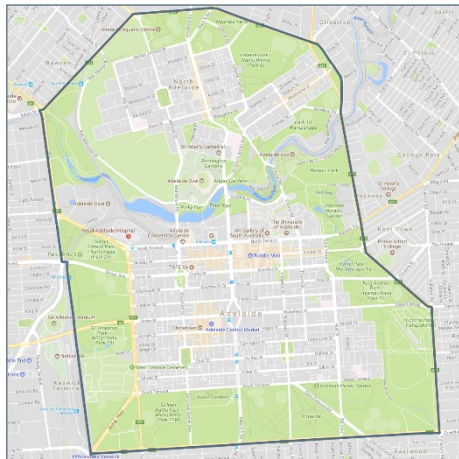
Adelaide has the second largest concentration of Drink establishments per km² out of the 88 LGAs analysed.

Adelaide's Core NTE is very different to that of SA and Australia, with a much higher concentration of Drink establishments (16% compared to 12% in SA and 8% in Australia) and significantly smaller proportion of Entertainment establishments (15% compared to 26% in SA and 29% in Australia).

Adelaide's disparity with SA and Australia is also apparent when looking at the proportion of the total economy that the Core NTE represents (see Table 16) across establishments (5%), employment (13%) and turnover (5%).

Table 16: Core NTE summary for City of Adelaide

Measure	Core NTE 2017		% Change 16-17	% Total Economy		
				LGA	SA	AUS
Establishments	808	⬇	-2.2%	5.2%	4.4%	4.7%
Employment	11,365	⬆	2.8%	13.1%	9.3%	8.9%
Turnover ($m)	$1,186	⬆	3.0%	4.8%	3.9%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

Core NTE establishments in Adelaide declined by 2.2% over 2016 to 2017. This loss was experienced across all three sub-sectors, although employment and turnover have increased in Entertainment (+3%, +4% respectively) and Food (+4%, +4%), indicating a move to larger establishments.

By comparison, employment and turnover in Drink contracted by 1% over the same period (Figure 25), driven mainly by pubs, taverns and bars, which represent 91% of the sub-sector. This activity is important to Adelaide's live music scene, with a high number of gigs occurring in this venue type[5].

Figure 24: Adelaide's establishments by sub-sector
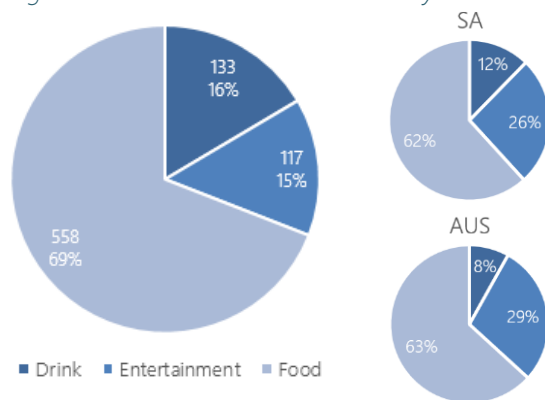
Figure 25: Trend in Adelaide's Drink sub-sector

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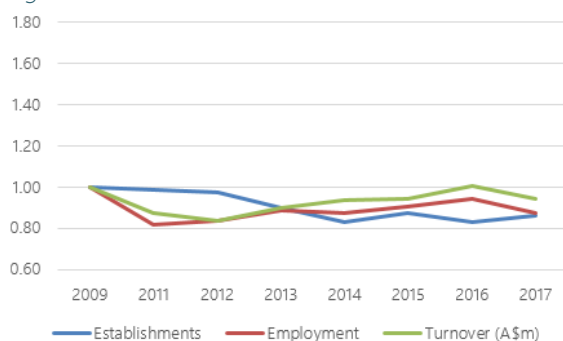
[5] Music SA, (2017), Adelaide Live Music Census 2017 (recorded in May)
http://www.musicsa.com.au/wp-content/uploads/2017/12/LMO-Adelaide-Live-Music-Census-2017_v2.pdf

7. The NTE in Tasmania (TAS)

The Core NTE in TAS represents a higher than average proportion of the total economy and is growing at a quicker pace than seen nationally.

As shown in Table 17, TAS' Core NTE accounts for 5.2% of all TAS establishments (compared to 4.7% nationally), 9.4% of all employment (compared to 8.9%) and 4.1% of all turnover (compared to 3.8%). Over the 2016 to 2017 period each of these metrics have increased at a faster rate than Australia.

Figure 26: Trend in TAS's Drink sub-sector

This is particularly true of employment (+8.3%), due to strong growth across all three sub-sectors:

- Drink (+190 / +5.5%)
- Entertainment (+420 / +8.8%)
- Food (+1,165 / +8.7%).

The increase in Drink is particularly positive, given that almost half of other states and territories have witnessed decline within this sub-sector over the last couple of years (including TAS). This could mean the sub-sector is experiencing some form of revival.

This would be welcome within TAS, as Drink activities represent 12% of all Core NTE establishments (compared to 8% nationally), 16% of Core NTE employment (compared to 12%) and 17% of turnover (compared to 15%).

Given TAS' rural nature, it might be expected that the two key cities, Hobart and Launceston, drive the Core NTE. However, the two cities account for 40% of Core NTE establishments, 39% of employment and 36% of turnover, indicating that there are other Core NTEs operating elsewhere across the state.

Figure 27: Trend in TAS's Food sub-sector
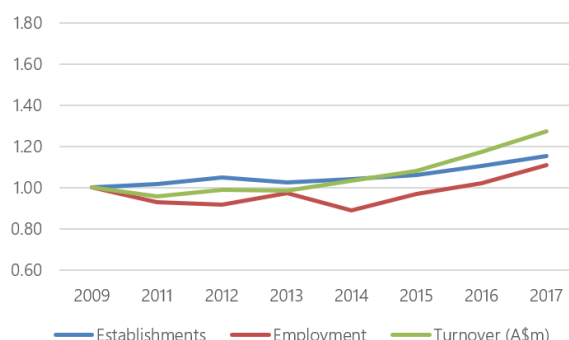
In summary, TAS' Core NTE is one that is important to the states' total economy (5.2% of all TAS establishments) and is growing at a rate quicker than the national average, particularly in employment. This is driven by strong growth between 2016 and 2017 across all three Core NTE sub-sectors, with Food contributing the greatest number of jobs. Recent growth in Drink establishments, could signify a potential resurgence for the sub-sector following a steady decline over the last few years.

Table 17: Core NTE summary for Tasmania

Measure	Core NTE 2017	% Change 16-17	% Total Economy TAS	AUS
Establishments	1,960	⬆ 3.6%	5.2%	4.7%
Employment	23,330	⬆ 8.3%	9.4%	8.9%
Turnover ($m)	$2,645	⬆ 5.4%	4.1%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_State

7.1. TAS: City of Hobart

Core NTE employment represents 14% of all employment in Hobart.

As can be seen in Table 18, Core NTE employment represents a much higher proportion of total employment than across Tasmania (9%) and Australia (9%). The same is true of establishments (8% compared to 5% in TAS and Australia) and turnover (5% compared to 4% in TAS and Australia).

While the number of Core NTE establishments in Hobart increased (+5.6%) between 2016 and 2017, employment in the Core NTE remained fairly static (declining by 0.3%), while turnover increased only slightly (+0.2%). This suggests a higher number of smaller establishments.

Table 18: Core NTE summary for City of Hobart

Measure	Core NTE 2017		% Change 16-17	% Total Economy		
				LGA	TAS	AUS
Establishments	469	⬆	5.6%	7.6%	5.2%	4.7%
Employment	6,575	⬇	-0.3%	13.7%	9.4%	8.9%
Turnover ($m)	$708	⬆	0.2%	5.3%	4.1%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

The maintaining of Hobart's employment and turnover position is driven mainly by an increase in Food establishments (+10%), which increased in employment and turnover by 4% each. Conversely the Drink and Entertainment sub-sectors saw declines in employment of 7% and 6% respectively.

This could signify a shift in the composition of Hobart's Core NTE towards a more Food focused approach. It will be important to review this trend in future years to understand the changes.

Figure 28: Hobart's Entertainment sub-sector
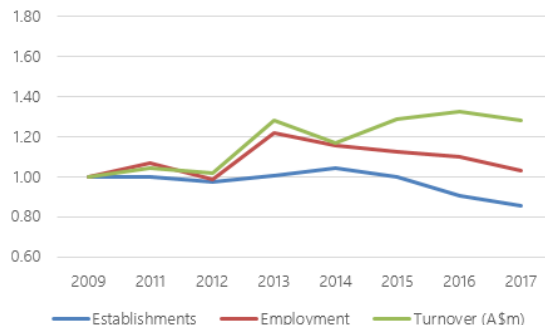
Figure 29: Trend in Hobart's Food sub-sector
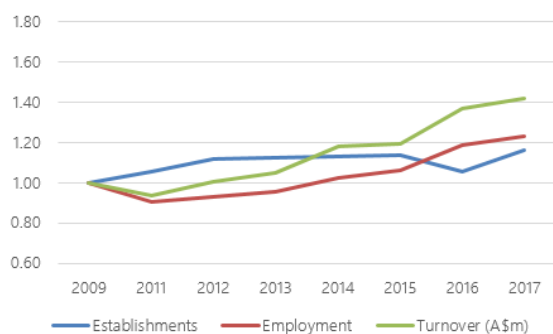
8. The NTE in Victoria (VIC)

The Core NTE in VIC is the second largest in Australia and is expanding at a faster rate than NSW and Australia as a whole.

VIC's Core NTE (Table 19) accounts for 28% of Australia's Core NTE establishments, 25% of its employment and 26% of its turnover. As with NSW, the distribution of the Core NTE amongst sub-sectors is broadly similar to that of Australia, except with a slightly increased focus on Food activities.

Figure 30: Sub-sector NTE growth 2016-2017 in VIC

Between 2016 and 2017, the Core NTE in VIC grew across establishments (+3.4% compared to 3.2% nationally), employment (+4.5% compared to +3.7%) and turnover (+3.9% compared to +3.1%).

The above average growth witnessed in VIC's Core NTE is courtesy of strong increases across every metric and sub-sector between 2016 and 2017. This is particularly true in the Entertainment and Food sub-sectors (Figure 30) which added 11,455 jobs to the Core NTE during this period.

The increase across key metrics in Food was comparable to that of Australia, whilst growth in Entertainment surpassed the national trend. While Drink employment grew (+0.8%), it was slightly less than the trend seen nationally (+1.1%).

The increase in Drink was driven by a similar increase (+1.1%) in employment in pubs, taverns and bars, whilst liquor retailing declined (-0.8%). Comparatively in the Food sub-sector, growth was relatively consistent across takeaway food services (+3.8%) and cafes and restaurants (+5.8%).

Figure 31: Trend in VIC's Core NTE
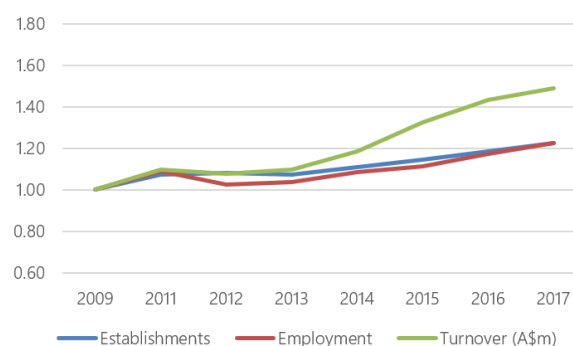
In summary, the Core NTE in VIC is one of the largest in the country and is growing more quickly than that of NSW and Australia. It is particularly strong in Food and Entertainment activities, which have grown considerably over the last year. The Drink sub-sector has grown at a similar pace to the national trend, which is positive considering the decline seen in other areas. Should these trends continue VIC's share of the Australian Core NTE is likely to increase in future years.

Table 19: Core NTE summary for Victoria

Measure	Core NTE 2017	% Change 16-17	% Total Economy VIC	% Total Economy AUS
Establishments	29,857	⬆ 3.4%	5.1%	4.7%
Employment	270,760	⬆ 4.5%	8.4%	8.9%
Turnover ($m)	$32,660	⬆ 3.9%	3.7%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_State

8.1. VIC: City of Melbourne
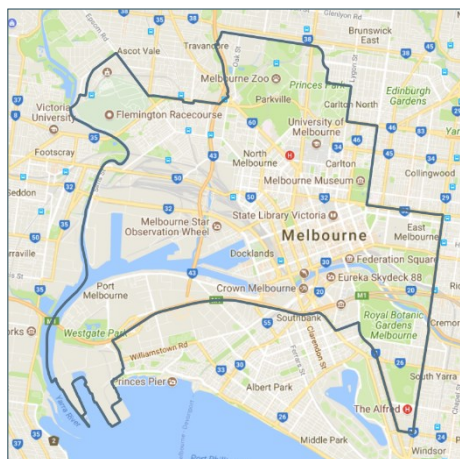
Melbourne's NTE continues to be driven by growth in its Food sub-sector. It has the second largest concentration of Core NTE and Food establishments per km² of the 88 LGAs analysed.

The number of Core NTE establishments remained relatively steady between 2016 and 2017 (-1.2%), while employment (+7.4%) and turnover (+6.5%) continued to rise, suggesting larger establishments with higher turnover.

In 2017 Food continued to be Melbourne's strongest Core NTE sub-sector, accounting for 70% of its NTE establishments and employment and 65% of its turnover. This is considerably higher than Victoria (64% of establishments) and Australia as a whole (63% of establishments) as demonstrated in Figure 32.

Table 20: Core NTE summary for City of Melbourne

Measure	Core NTE 2017		% Change 16-17	% Total Economy		
				LGA	VIC	AUS
Establishments	2,405	⬇	-1.2%	6.3%	5.1%	4.7%
Employment	30,370	⬆	7.4%	10.5%	8.4%	8.9%
Turnover ($m)	$3,219	⬆	6.5%	4.1%	3.7%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

Growth in employment and turnover in the Core NTE was driven by the Food sub-sector, which experienced a 12% rise between 2016 and 2017.

By comparison, establishments (-6%), employment (-3%) and turnover (-6%) in the Drink sub-sector declined during this two-year period and Entertainment remained fairly static, declining by 1% in establishments, 2% in employment and 1% in turnover.

Figure 32: Melbourne's establishments by sub-sector

■ Drink ■ Entertainment ■ Food
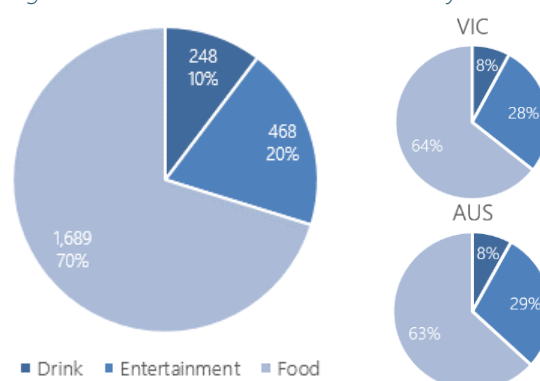
Figure 33: Trend in Melbourne's Food sub-sector
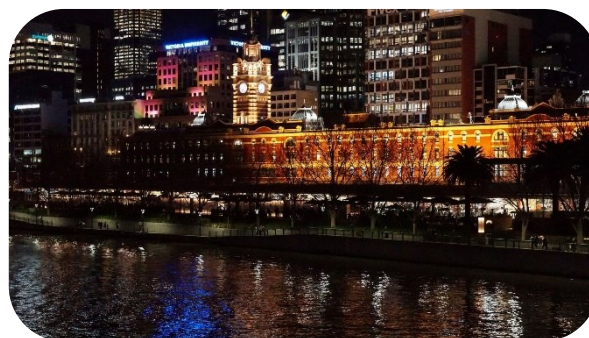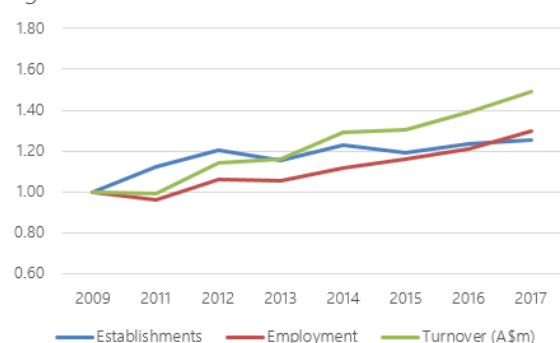
8.2. VIC: Maroondah City Council
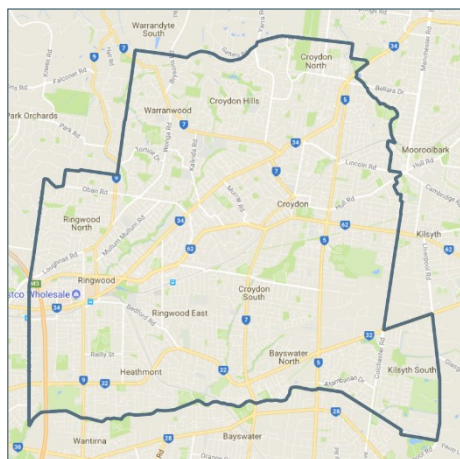
Maroondah's Core NTE is relatively small, with less reliance on Drink and an emphasis on Food.

Food is key in Maroondah accounting for 67% of Core NTE establishments, 63% of employment and 54% of turnover. This is slightly higher than that of Victoria and Australia.

All aspects of Maroondah's Core NTE grew slightly between 2016 and 2017, with the exception of the Food sub-sector, which experienced growth in the number of establishments (+2.1%) but a decline in employment (-5.7%) and turnover (-5.4%).

Table 21: Core NTE summary for Maroondah City Council

Measure	Core NTE 2017	% Change 16-17	% Total Economy LGA	VIC	AUS
Establishments	363	⬆ 2.8%	3.9%	5.1%	4.7%
Employment	2,775	⬆ 0.7%	5.5%	8.4%	8.9%
Turnover ($m)	$313	⬆ 3.7%	2.2%	3.7%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

Food experienced particularly strong growth (see Figure 34) from 2015 to 2016 (+17.4%). This suggests that the lull in 2017 could be a settling period, but it should continue to be monitored in future iterations.

The Entertainment sub-sector achieved strong growth between 2016 and 2017, thanks to the creative and performing arts activities industry, which saw an additional 110 employees added to the sub-sector. This helped it recover from its historical downward trend (see Figure 35).

Figure 34: Trend in Maroondah's Food sub-sector
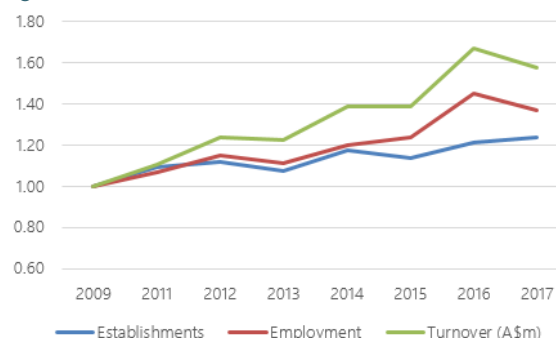
Figure 35: Trend in Maroondah's Entertainment
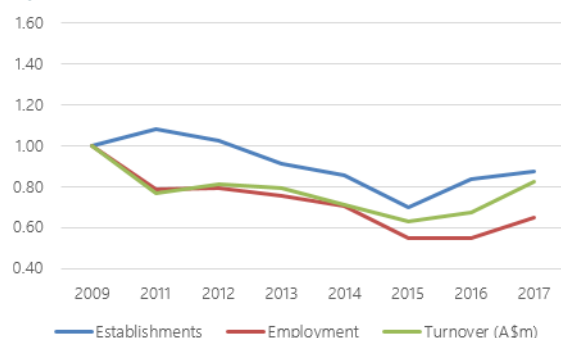
8.3. VIC: Port Phillip City Council

Of the 88 LGAs analysed, Port Phillip has the sixth highest concentration of Core NTE establishments per km² and the fifth highest concentration of Entertainment establishments.

Entertainment is a key strength of Port Phillip accounting for 38% of its Core NTE establishments, 31% of employment and 42% of turnover, which is quite different to that of Victoria and Australia as a whole. The Drink sub-sector represents a similar proportion to that of the state, whereas Food is a much smaller proportion by comparison (as shown in Figure 36).

The trend in Entertainment is driven primarily by a large number of establishments, employment and turnover in the creative and performing arts space.

Table 22: Core NTE summary for Port Phillip City Council

Measure	Core NTE 2017		% Change 16-17	% Total Economy		
				LGA	VIC	AUS
Establishments	1,274	⬆	2.7%	6.2%	5.1%	4.7%
Employment	13,845	⬆	5.9%	12.6%	8.4%	8.9%
Turnover ($m)	$1,593	⬆	7.3%	5.5%	3.7%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

Over the 2016 to 2017 period, Port Phillip experienced growth across all three measures, with employment and turnover growing quicker than rates witnessed at the state and national level.

While Entertainment is one of Port Phillip's key sub-sectors, its growth has been relatively slow between 2016 and 2017 across establishments (+1.3%) with stronger growth in employment (+3.5%) and turnover (+7.9%). As with several LGAs in this report, Food is the sub-sector, that has grown the most over the last eight years (Figure 37).

Figure 36: Port Phillip's establishments by sub-sector
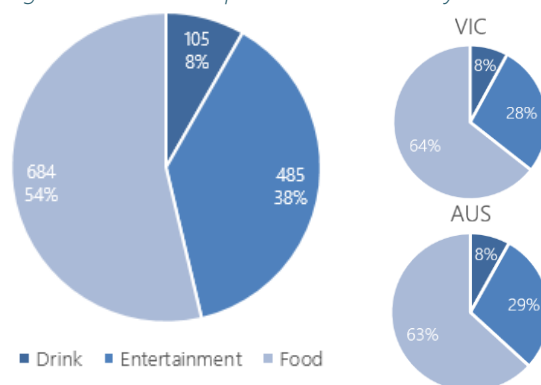
Figure 37: Trend in Port Phillip's Food sub-sector
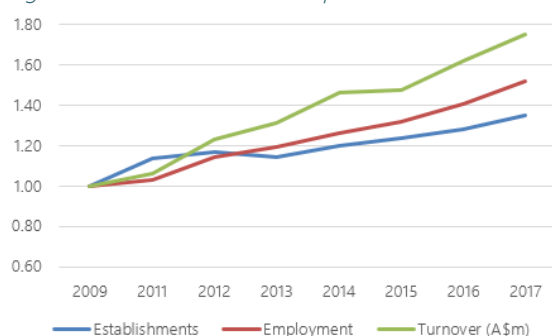
9. The NTE in Western Australia (WA)

WA has stronger than average Food and Drink sub-sectors and has the fourth largest Core NTE of all Australia's states and territories.

Whilst the number of establishments in WA overall economy grew at a much slower rate than the national average between 2016 and 2017 (1.5% compared to 3.1% nationally), the number of establishments in WA's Core NTE increased at the same rate as the national average (+3.2%).
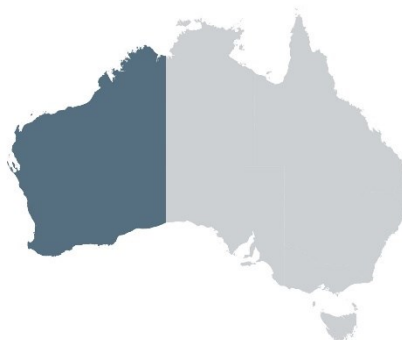
Figure 38: WA's and Australia's Core NTE turnover

The Core NTE in WA grew across all three metrics between 2016 and 2017. In particular, employment and turnover in WA's Core NTE, grew at a much stronger rate than the national average (+4.8% and +4.4% respectively compared to +3.7% and 3.1% nationally).

The Food sub-sector in WA experienced particularly strong employment and turnover growth between 2016 and 2017 (both +6.5%). The Drink sub-sector also experienced particularly strong increase in turnover (+6.6%), primarily in liquor retailing (+14%).

WA's strongest NTE sub-sectors are Food and Drink, which hold a higher proportion of the Core NTE across all metrics. Entertainment, however, is weaker than the national average, representing a lower proportion of the Core NTE across all metrics:

- Establishments: 26% in WA, 29% nationally
- Employment: 17% in WA, 25% nationally
- Turnover: 24% in WA, 33% nationally

This sub-sector also grew at a lower rate than the national average between 2016 and 2017.

Figure 39: Trend in WA's Core NTE sector
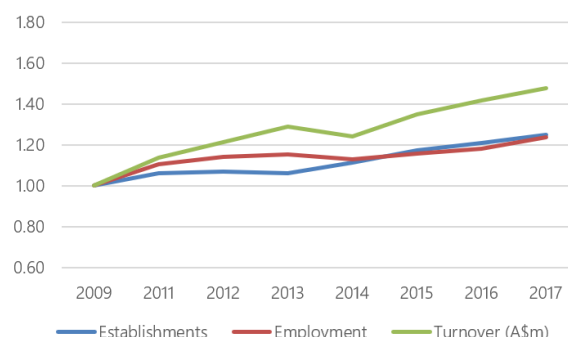
In summary, WA's Core NTE is the fourth largest of Australia's states and territories. The state has a strong Food and Drink sub-sector but a comparatively weaker Entertainment sub-sector, suggesting an opportunity for development. Over the last year, WA's Core NTE has grown at a faster rate than its overall economy, especially in Food turnover and employment, as well as Drink turnover.

Table 23: Core NTE summary for Western Australia

Measure	Core NTE 2017	% Change 16-17	% Total Economy WA	AUS
Establishments	9,953	⬆ 3.2%	4.4%	4.7%
Employment	116,935	⬆ 4.8%	8.8%	8.9%
Turnover ($m)	$13,609	⬆ 4.4%	3.3%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_State

9.1. WA: City of Perth[6]

Of the 88 LGAs analysed, Perth's Drink sub-sector ranks sixth highest in terms of establishments per km2. and third for turnover and employment density.

The Drink sub-sector represents 14% of Perth's Core NTE. This compares to just 8% Australia wide. Not only does Perth have a stronger than average Drink sub-sector, this sub-sector experienced growth between 2016 and 2017 in establishments (+8.8%), employment (+2.1%) and turnover (+2.0%).

In Perth's Core NTE overall, the number of establishments increased but employment and turnover declined. This is against the trend witnessed across WA, as can be seen in Figure 40.

Table 24: Core NTE summary for City of Perth

Measure	Core NTE 2017		% Change 16-17	% Total Economy		
				LGA	WA	AUS
Establishments	605	⬆	1.2%	5.0%	4.4%	4.7%
Employment	9,430	⬇	-4.0%	8.2%	8.8%	8.9%
Turnover ($m)	$962	⬇	-4.5%	2.8%	3.3%	3.8%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/1_LGA

Drink was the only Core NTE sub-sector in Perth to experience growth during this period, with both Entertainment and Food experiencing declines in employment (-12.2% and -4.3% respectively) and turnover (-12.9% and -4.2%).

Compared to Drink, Perth's Entertainment sub-sector is relatively smaller, representing just 15% of all Perth's Core NTE turnover. This compares to Entertainment representing 33% Australia wide.

Figure 40: Change in Core NTE in Perth and WA
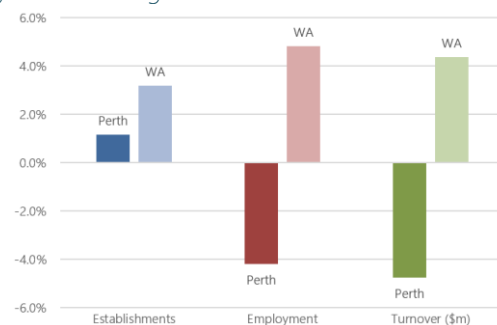
Figure 41: Perth's turnover by sub-sector

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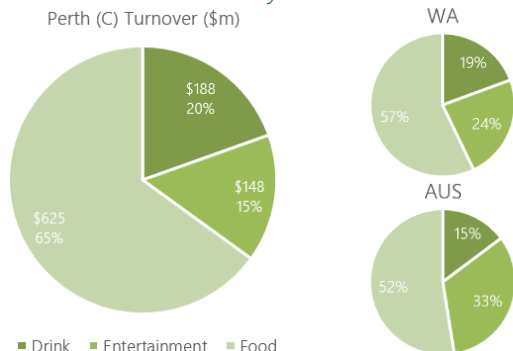
[6] Please note that due to changes in ABS methodologies that there is a disconnect from 2015 to 2016 data, as explained in the method.

10. Appendix

10.1. Sources

Table 25: Sources for images used

Council Area	Source
Australian Capital Territory	Supplied by CCCLM
City of Adelaide	www.flickr.com/photos/dynamix00/
Brisbane City Council	www.flickr.com/photos/lennykphotography/
City of Darwin	www.flickr.com/photos/httpwwwflickrcomphotostopend/
City of Gold Coast	www.flickr.com/photos/bruvva/
City of Hobart	www.flickr.com/photos/michelphan/
Maroondah City Council	www.qicgre.com/places/eastland
City of Melbourne	Supplied by City of Melbourne Council
City of Newcastle	www.visitnewcastle.com.au/
City of Parramatta	www.dailytelegraph.com.au/newslocal/parramatta/praise-for-parramattas-proud-beating-heart/news-story/ea490bf9fae8e906f245bb4997b78ad0
City of Perth	www.flickr.com/photos/steve_ellis/2709732487/
Port Phillip City Council	www.flickr.com/photos/scott-s_photos/
City of Sydney	www.flickr.com/photos/mklapper/

10.2. Methodology

10.2.1. Definitions

As noted in the Glossary (p4), the NTE refers to economic activity which occurs at establishments primarily between the hours of 6 p.m. and 6 a.m. This is then broken down further into Core, Non-Core and Supply.

These NTE sectors are defined using the Australian and New Zealand Standard Industrial Classification (ANZSIC) system, which are aligned with definitions used in previous work in the United Kingdom and New Zealand. The codes used to define Core, Non-Core and Supply are provided below.

Table 26: Core NTE ANZSIC definition

NTE Sub-Sector	ANZSIC	Description
Drink	4123	Liquor Retailing
	4520	Pubs, Taverns and Bars
Entertainment	551[7]	Motion Picture and Video Activities
	900	Creative and Performing Arts Activities
	911	Sports and Physical Recreation Activities
	912	Horse and Dog Racing Activities
	913	Amusement and Other Recreation Activities
	920	Gambling Activities
	4530	Clubs (Hospitality)
	9534	Brothel Keeping and Prostitution
Food	4511	Cafes and Restaurants
	4512	Takeaway Food Services

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

Table 27: Non-Core NTE ANZSIC definition

NTE Sub-Sector	ANZSIC	Description
Care	771	Public Order and Safety Services
	840	Hospitals
Creative Education	8212	Arts Education
Cultural	601	Libraries and Archives
Design	692	Architectural, Engineering and Technical Services
Food	411	Supermarket and Grocery Stores
	4121	Fresh Meat, Fish & Poultry Retailing
	4122	Fruit & Vegetable Retailing
	4129	Other Specialised Food Retailing
Hospitality	4400	Accommodation
Infrastructure	29	Waste Collection, Treatment and Disposal Services
	751	Central Government Administration
	753	Local Government Administration
	772	Regulatory Services
	9531	Laundry and Dry-Cleaning Services
Other Education	8219	Adult, Community and Other Education n.e.c.
Promotion	694	Advertising Services
Research	695	Market Research and Statistical Services
Retail/Other	422	Electrical and Electronic Goods Retailing
	425	Clothing, Footwear and Personal Accessory Retailing
	426	Department Stores
	427	Pharmaceutical and Other Store Based Retailing
	4241	Sport and Camping Equipment Retailing
	4242	Entertainment Media Retailing
	4243	Toy and Game Retailing
	4244	Newspaper and Book Retailing
	4245	Marine Equipment Retailing
Sports Education	8211	Sports and Physical Recreation Instruction
Transport	472	Rail Passenger Transport
	482	Water Passenger Transport
	4621	Interurban and Rural Bus Transport
	4622	Urban Bus Transport (including Tramway)
	4623	Taxi and Other Road Transport
	9533	Parking Services

Table 28: Supply NTE ANZSIC definition

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

10.2.2. Data sources

Data was acquired from the Australian Bureau of Statistics (ABS) via bespoke request from their Counts of Australian Businesses, including Entries and Exits (CABEE), June 2013 to June 2017 dataset[8]. Through a collaborative approach with the ABS, the bespoke request covered the ANZSICs set out in Section 10.2.1 (p29) for a total of 88 LGAs, including:

- The current and previous members of the LGSCN (15 LGAs),
- Areas considered to be in the top 21 growing cities[9] of Australia (13 LGAs),
- A selection of areas that had a large population density (per km^2), were listed as a city council area or a 'major city of Australia' and met the confidentiality constraints of the ABS (55 LGAs),
- An additional set of areas in NSW which are actively working on their NTE strategy (5 LGAs).

This extended the coverage of the analysis considerably when compared to previous years, which included members of the LGSCN only. In addition to this extended LGA coverage, data was acquired from the CABEE dataset for federal and state / territory figures.

This dataset was analysed and modelled using additional ABS datasets including labour force data[10] and industry turnover[11] data. Once finalised data was presented across the geographic areas of LGA, state / territory and Australia as a whole, by a variety of ANZSIC groupings including NTE sector and sub-sector.

In some cases, ANZSIC level data can be provided, but in others the numbers can be small leading to large percentage swings when reviewing comparatively between years. This can be problematic as the ABS applies perturbation[12] techniques when dealing with smaller numbers in order to maintain confidentiality of businesses involved in the dataset. This is the main reason why ANZSIC data is not published widely within this document and is only used in those LGAs where numbers are large enough.

Important points to note about the CABEE dataset

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

Most establishments are counted as a single unit, at the location of their registered address, or at the address with the highest employment. Establishments operating from multiple locations (for example large cinema chains) may only be counted once. Conversely, establishments whose legal structure means they have registered for separate ABNs may be counted multiple times.

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

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[8] ABS Catalogue 8165.0 - Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017
http://www.abs.gov.au/ausstats/abs@.nsf/mf/8165.0
[9] Smart Cities Plan: https://smart-cities.dashboard.gov.au/all-cities/overview
[10] ABS Catalogue 6202.0 - Labour Force http://www.abs.gov.au/ausstats/abs@.nsf/mf/6202.0
[11] ABS Catalogue 8155.0 – Australian Industry http://www.abs.gov.au/ausstats/abs@.nsf/mf/8155.0
[12] The ABS Catalogue 8165.0 (link at footnote 8) for CABEE explains the use of perturbation in the context of business counts. Additional information on the perturbation technique is available in the Census of Population and Housing dataset (ABS Catalogue 2011.0.55.001) http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/2011.0.55.001~2016~Main%20Features~Data%20Quality%20and%20Random%20Perturbation~18

10.2.3. Changes to geographic boundaries

Between the 2015 iteration of this study and this 2016-17 iteration there have been a number of LGA boundary changes introduced across Australia.

One LGA affected within this report is the City of Parramatta, the boundary of which was revised in 2016[13]. This change saw parts of the previous Parramatta boundary combined with parts of The Hills Shire, Auburn City, Holroyd City and Hornsby Shire. While figures for this LGA do not look too different between 2015 and 2016, it should be noted that there is a disconnect in the time series between these years and this should be borne in mind when reviewing data over this period.

Another LGA affected was City of Perth, the boundary of which was also revised in 2016[14], absorbing part of the City of Subiaco (south of Aberdare Road). As above, this change creates a disconnect in the time series between 2015 and 2016. As 2016 and 2017 data for City of Perth was acquired from the CABEE 2017 dataset, both reporting years make use of the new LGA boundary.

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

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

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

10.2.4. Revision to 2015 state, territory and federal employment and turnover figures

Please note, that during the course of this iteration of the research, an anomaly was identified in the 2015 employment and turnover estimates for state, territory and federal levels. These figures have been revised within this latest report and may differ from the previously published report[15]. There is no impact on LGA figures, which remain unchanged between this 2016-17 report and the previous report.

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[13] https://www.cityofparramatta.nsw.gov.au/council/governance-of-the-council/wards
[14] https://www.perth.wa.gov.au/city-perth-boundary-map
[15] Houghton, M. and Rowell, A. (2017), The Australian Night Time Economy 2015, Ortus Economic Research

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

10.3.1. Australian Capital Territory

Table 29: Australian Capital Territory – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	109	109	102	101	106	106	100	110	10	10.0%
Entertainment	427	422	415	407	415	418	429	441	12	2.8%
Food	872	957	965	962	1,059	1,119	1,156	1,201	45	3.9%
Establishments	**1,408**	**1,488**	**1,482**	**1,470**	**1,580**	**1,643**	**1,685**	**1,752**	**67**	**4.0%**
Drink	1,940	2,115	1,860	1,685	1,820	2,085	2,200	2,150	-50	-2.3%
Entertainment	5,555	5,745	5,355	5,500	5,875	6,165	6,760	6,920	160	2.4%
Food	16,920	18,010	19,890	19,425	18,020	18,895	19,030	20,625	1,595	8.4%
Employment	**24,415**	**25,870**	**27,110**	**26,610**	**25,715**	**27,145**	**27,990**	**29,695**	**1,705**	**6.1%**
Drink	$250	$264	$294	$166	$295	$270	$273	$274	$1	0.3%
Entertainment	$694	$698	$609	$594	$679	$837	$927	$928	$1	0.1%
Food	$1,426	$1,565	$1,807	$1,820	$1,768	$1,771	$1,844	$1,998	$154	8.4%
Turnover (A$m)	**$2,370**	**$2,528**	**$2,710**	**$2,580**	**$2,742**	**$2,877**	**$3,044**	**$3,200**	**$156**	**5.1%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_State

10.3.2. New South Wales

Table 30: New South Wales – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	2,717	2,777	2,786	2,735	2,818	2,817	2,868	2,910	42	1.5%
Entertainment	10,981	11,157	10,960	10,472	10,501	10,664	10,738	11,029	291	2.7%
Food	17,644	18,987	19,352	18,907	20,082	20,763	21,505	22,257	752	3.5%
Establishments	**31,342**	**32,921**	**33,098**	**32,114**	**33,401**	**34,244**	**35,111**	**36,196**	**1,085**	**3.1%**
Drink	44,125	44,890	40,940	41,150	40,660	42,670	43,115	43,560	445	1.0%
Entertainment	80,685	79,710	83,085	84,220	85,455	88,175	90,935	90,060	-875	-1.0%
Food	169,940	185,045	175,820	178,970	185,515	186,060	187,570	195,735	8,165	4.4%
Employment	**294,745**	**309,645**	**299,845**	**304,340**	**311,630**	**316,905**	**321,620**	**329,355**	**7,735**	**2.4%**
Drink	$4,925	$5,007	$4,971	$5,135	$5,525	$6,054	$6,436	$6,507	$72	1.1%
Entertainment	$9,551	$9,246	$9,895	$9,459	$10,024	$12,709	$13,398	$13,188	-$210	-1.6%
Food	$14,323	$16,084	$15,973	$16,532	$18,207	$17,440	$18,170	$18,960	$790	4.3%
Turnover (A$m)	**$28,799**	**$30,337**	**$30,839**	**$31,126**	**$33,757**	**$36,203**	**$38,004**	**$38,656**	**$652**	**1.7%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_State

Table 31: City of Newcastle – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	111	101	98	102	104	111	104	111	7	6.7%
Entertainment	278	276	277	259	266	243	219	231	12	5.5%
Food	400	412	428	412	447	470	435	480	45	10.3%
Establishments	**789**	**789**	**803**	**773**	**817**	**824**	**758**	**822**	**64**	**8.4%**
Drink	1,740	1,540	1,765	1,950	1,775	1,675	1,710	1,880	170	9.9%
Entertainment	3,830	3,420	3,760	3,450	3,520	3,470	3,415	3,420	5	0.1%
Food	4,490	4,800	4,875	5,565	6,125	6,730	6,835	7,590	755	11.0%
Employment	**10,060**	**9,760**	**10,400**	**10,965**	**11,425**	**11,875**	**11,960**	**12,890**	**930**	**7.8%**
Drink	$173.3	$160.0	$160.3	$180.2	$173.0	$158.8	$164.3	$180.9	$16.6	10.1%
Entertainment	$459.1	$400.8	$463.7	$437.2	$426.3	$477.8	$501.0	$514.6	$13.6	2.7%
Food	$378.4	$417.4	$442.7	$514.2	$597.0	$637.4	$662.5	$736.4	$73.9	11.2%
Turnover (A$m)	**$1,010.8**	**$978.2**	**$1,066.7**	**$1,131.6**	**$1,196.3**	**$1,274.0**	**$1,327.8**	**$1,431.8**	**$104.1**	**7.8%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

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Table 32: City of Parramatta[16] – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Change 2016-17 Percentage
Drink	45	46	46	41	37	34	43	46	3	7.0%
Entertainment	240	250	235	222	217	225	198	224	26	13.1%
Food	646	761	804	778	886	924	897	901	4	0.4%
Establishments	931	1,057	1,085	1,041	1,140	1,183	1,138	1,171	33	2.9%
Drink	550	700	680	710	570	490	535	565	30	5.6%
Entertainment	2,350	2,245	2,255	1,965	2,010	2,120	2,080	2,205	125	6.0%
Food	4,745	5,160	5,885	5,240	5,735	6,020	5,255	5,310	55	1.0%
Employment	7,645	8,100	8,815	7,910	8,310	8,630	7,870	8,075	205	2.6%
Drink	$75.4	$86.9	$61.6	$65.5	$55.6	$46.4	$85.3	$90.2	$4.9	5.7%
Entertainment	$282.1	$263.0	$277.9	$248.3	$243.2	$292.1	$445.3	$448.3	$3.0	0.7%
Food	$399.8	$448.3	$534.7	$484.3	$558.6	$570.3	$490.3	$495.7	$5.3	1.1%
Turnover (A$m)	$757.3	$798.2	$874.2	$798.1	$857.4	$908.7	$1,020.9	$1,034.2	$13.2	1.3%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

Table 33: City of Sydney – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Change 2016-17 Percentage
Drink	416	430	562	546	576	530	547	574	27	4.9%
Entertainment	835	874	838	783	826	823	859	870	11	1.3%
Food	2,730	3,065	3,290	3,148	3,354	3,254	3,378	3,428	50	1.5%
Establishments	3,981	4,369	4,690	4,477	4,756	4,607	4,784	4,872	88	1.8%
Drink	4,310	3,990	4,805	5,180	5,285	5,145	5,125	5,570	445	8.7%
Entertainment	6,735	6,575	6,785	6,915	7,285	7,200	7,430	7,610	180	2.4%
Food	17,300	16,650	18,335	18,255	19,305	20,065	20,930	22,395	1,465	7.0%
Employment	28,345	27,210	29,930	30,350	31,875	32,410	33,485	35,580	2,095	6.3%
Drink	$445.1	$422.4	$534.7	$586.3	$631.1	$597.2	$602.3	$641.6	$39.3	6.5%
Entertainment	$939.5	$886.1	$961.8	$1,006.5	$1,014.2	$1,139.2	$1,186.4	$1,245.2	$58.8	5.0%
Food	$1,458.0	$1,447.3	$1,666.0	$1,687.1	$1,880.8	$1,900.4	$2,028.6	$2,172.3	$143.7	7.1%
Turnover (A$m)	$2,842.6	$2,755.8	$3,162.5	$3,279.9	$3,526.1	$3,636.8	$3,817.3	$4,059.1	$241.8	6.3%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

10.3.3. Northern Territory

Table 34: Northern Territory – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Change 2016-17 Percentage
Drink	54	55	62	57	56	60	50	50	0	0.0%
Entertainment	235	239	221	229	221	207	221	231	10	4.5%
Food	365	397	394	389	406	415	449	473	24	5.3%
Establishments	654	691	677	675	683	682	720	754	34	4.7%
Drink	1,960	2,055	3,205	3,270	5,285	2,730	2,580	2,415	-165	-6.4%
Entertainment	3,320	4,025	2,290	2,280	2,940	5,860	6,400	6,130	-270	-4.2%
Food	6,720	7,205	8,830	8,515	7,905	9,235	9,705	10,155	450	4.6%
Employment	11,995	13,285	14,325	14,070	16,130	17,825	18,685	18,700	15	0.1%
Drink	$215	$221	$385	$427	$599	$293	$260	$243	-$17	-6.4%
Entertainment	$377	$475	$268	$216	$354	$971	$1,005	$945	-$59	-5.9%
Food	$566	$626	$802	$851	$776	$866	$940	$984	$44	4.7%
Turnover (A$m)	$1,158	$1,322	$1,455	$1,494	$1,729	$2,129	$2,204	$2,172	-$32	-1.5%

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_State

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[16] Please note that the Parramatta LGA boundary was revised in 2016 causing a disconnect in the time series from 2015 to 2016. For additional details please see Section 10.2.3, page 31.

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Table 35: City of Darwin – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	21	23	23	19	17	15	19	18	-1	-5.3%
Entertainment	124	126	118	105	101	99	113	110	-3	-2.7%
Food	197	214	220	214	219	229	263	281	18	6.8%
Establishments	**342**	**363**	**361**	**338**	**337**	**343**	**395**	**409**	**14**	**3.5%**
Drink	315	320	515	515	525	435	430	415	-15	-3.5%
Entertainment	1,905	1,830	1,755	1,620	1,610	1,555	1,700	1,675	-25	-1.5%
Food	2,330	2,340	2,605	2,620	2,725	3,100	3,155	3,550	395	12.5%
Employment	**4,550**	**4,490**	**4,870**	**4,760**	**4,860**	**5,090**	**5,290**	**5,640**	**350**	**6.6%**
Drink	$37.9	$39.1	$46.6	$47.8	$51.2	$41.0	$41.9	$40.1	-$1.8	-4.3%
Entertainment	$228.5	$214.4	$216.4	$205.6	$195.3	$214.2	$244.7	$242.9	-$1.7	-0.7%
Food	$196.2	$203.5	$236.5	$242.1	$265.8	$293.7	$305.9	$344.3	$38.4	12.6%
Turnover (A$m)	**$462.6**	**$457.0**	**$499.5**	**$495.5**	**$512.3**	**$548.9**	**$592.5**	**$627.4**	**$34.9**	**5.9%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

10.3.4. Queensland

Table 36: Queensland – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	1,217	1,183	1,153	1,138	1,127	1,147	1,144	1,143	-1	-0.1%
Entertainment	5,735	5,782	5,669	5,414	5,382	5,392	5,427	5,628	201	3.7%
Food	9,369	10,070	10,104	10,150	10,778	11,328	11,845	12,346	501	4.2%
Establishments	**16,321**	**17,035**	**16,926**	**16,702**	**17,287**	**17,867**	**18,416**	**19,117**	**701**	**3.8%**
Drink	21,115	22,635	24,975	23,630	22,915	23,555	23,340	24,335	995	4.3%
Entertainment	44,295	45,145	53,685	58,025	56,465	55,115	55,445	57,100	1,655	3.0%
Food	121,965	132,455	127,930	129,485	136,870	131,595	132,345	140,205	7,860	5.9%
Employment	**187,375**	**200,235**	**206,585**	**211,140**	**216,255**	**210,270**	**211,135**	**221,645**	**10,510**	**5.0%**
Drink	$2,081	$2,274	$2,742	$2,692	$2,741	$2,655	$2,733	$2,836	$103	3.8%
Entertainment	$5,479	$5,462	$6,882	$6,805	$6,857	$8,485	$8,721	$8,858	$137	1.6%
Food	$10,280	$11,513	$11,623	$12,577	$13,433	$12,335	$12,820	$13,582	$761	5.9%
Turnover (A$m)	**$17,840**	**$19,249**	**$21,247**	**$22,074**	**$23,032**	**$23,475**	**$24,275**	**$25,276**	**$1,001**	**4.1%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_State

Table 37: Brisbane City Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	262	280	271	268	262	259	278	281	3	1.1%
Entertainment	1,597	1,703	1,675	1,563	1,583	1,573	1,611	1,671	60	3.7%
Food	2,780	3,214	3,307	3,294	3,490	3,739	4,078	4,244	166	4.1%
Establishments	**4,639**	**5,197**	**5,253**	**5,125**	**5,335**	**5,571**	**5,967**	**6,196**	**229**	**3.8%**
Drink	4,580	4,480	4,475	4,890	4,555	4,295	4,500	4,605	105	2.3%
Entertainment	14,295	12,285	16,960	16,595	16,415	16,605	17,725	18,095	370	2.1%
Food	32,345	35,435	36,865	37,095	38,990	42,470	43,830	47,020	3,190	7.3%
Employment	**51,225**	**52,200**	**58,300**	**58,580**	**59,960**	**63,370**	**66,055**	**69,725**	**3,670**	**5.6%**
Drink	$417.4	$423.2	$406.5	$451.8	$443.7	$407.0	$444.8	$446.2	$1.3	0.3%
Entertainment	$1,834.2	$1,525.4	$2,091.1	$2,101.5	$1,988.3	$2,285.2	$2,519.8	$2,589.4	$69.7	2.8%
Food	$2,726.4	$3,080.1	$3,349.3	$3,428.2	$3,799.2	$4,022.4	$4,299.6	$4,616.1	$316.5	7.4%
Turnover (A$m)	**$4,978.0**	**$5,028.7**	**$5,846.9**	**$5,981.5**	**$6,231.2**	**$6,714.6**	**$7,264.2**	**$7,651.8**	**$387.6**	**5.3%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

Table 38: City of Gold Coast – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	142	136	133	133	137	128	-9	-6.6%
Entertainment	988	940	931	961	988	1,021	33	3.3%
Food	1,757	1,700	1,795	1,865	1,965	2,067	102	5.2%
Establishments	**2,887**	**2,776**	**2,859**	**2,959**	**3,090**	**3,216**	**126**	**4.1%**
Drink	2,045	2,130	2,340	2,260	2,480	2,270	-210	-8.5%
Entertainment	10,160	9,535	9,435	9,825	9,810	10,310	500	5.1%
Food	16,975	17,120	18,110	19,655	20,015	21,950	1,935	9.7%
Employment	**29,180**	**28,785**	**29,885**	**31,735**	**32,305**	**34,530**	**2,225**	**6.9%**
Drink	$185.8	$196.7	$227.8	$214.0	$239.8	$220.0	-$19.8	-8.3%
Entertainment	$1,252.4	$1,207.3	$1,143.4	$1,352.1	$1,407.2	$1,500.7	$93.4	6.6%
Food	$1,542.2	$1,582.4	$1,764.8	$1,861.4	$1,939.7	$2,128.8	$189.1	9.7%
Turnover (A$m)	**$2,980.4**	**$2,986.4**	**$3,136.0**	**$3,427.6**	**$3,586.7**	**$3,849.4**	**$262.7**	**7.3%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

10.3.5. South Australia

Table 39: South Australia – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	799	779	783	780	792	806	795	792	-3	-0.4%
Entertainment	1,766	1,774	1,702	1,614	1,578	1,600	1,632	1,671	39	2.4%
Food	3,134	3,303	3,420	3,419	3,572	3,708	3,860	3,978	118	3.1%
Establishments	**5,699**	**5,856**	**5,905**	**5,813**	**5,942**	**6,114**	**6,287**	**6,441**	**154**	**2.4%**
Drink	16,075	17,150	14,880	13,260	12,230	12,690	12,455	11,935	-520	-4.2%
Entertainment	14,790	14,405	11,600	12,240	13,255	14,320	14,885	14,785	-100	-0.7%
Food	39,555	41,300	41,970	41,430	46,125	48,150	49,000	50,095	1,095	2.2%
Employment	**70,420**	**72,855**	**68,445**	**66,930**	**71,615**	**75,160**	**76,340**	**76,815**	**475**	**0.6%**
Drink	$1,604	$1,736	$1,548	$1,518	$1,412	$1,500	$1,521	$1,516	-$5	-0.3%
Entertainment	$1,879	$1,773	$1,487	$1,307	$1,601	$2,167	$2,267	$2,226	-$42	-1.8%
Food	$3,334	$3,590	$3,813	$3,915	$4,527	$4,513	$4,747	$4,853	$106	2.2%
Turnover (A$m)	**$6,817**	**$7,099**	**$6,848**	**$6,740**	**$7,540**	**$8,181**	**$8,534**	**$8,594**	**$60**	**0.7%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_State

Table 40: City of Adelaide – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	118	109	112	110	133	131	142	133	-9	-6.3%
Entertainment	123	119	122	113	115	114	121	117	-4	-3.3%
Food	505	511	560	533	520	521	563	558	-5	-0.9%
Establishments	**746**	**739**	**794**	**756**	**768**	**766**	**826**	**808**	**-18**	**-2.2%**
Drink	2,335	2,225	1,900	2,125	2,355	2,255	2,330	2,305	-25	-1.1%
Entertainment	1,600	1,735	2,040	1,710	1,925	1,660	1,650	1,700	50	3.0%
Food	6,445	6,190	6,420	6,530	6,270	7,100	7,080	7,360	280	4.0%
Employment	**10,380**	**10,145**	**10,360**	**10,360**	**10,550**	**11,015**	**11,060**	**11,365**	**305**	**2.8%**
Drink	$214.4	$209.1	$172.6	$196.3	$229.5	$213.6	$225.5	$223.4	-$2.2	-1.0%
Entertainment	$191.5	$203.3	$251.5	$216.4	$233.0	$228.7	$240.0	$248.9	$8.9	3.7%
Food	$543.0	$538.0	$583.4	$603.3	$610.9	$672.4	$686.2	$714.0	$27.9	4.1%
Turnover (A$m)	**$948.9**	**$950.4**	**$1,007.5**	**$1,016.0**	**$1,073.4**	**$1,114.7**	**$1,151.7**	**$1,186.3**	**$34.6**	**3.0%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

10.3.6. Tasmania

Table 41: Tasmania – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	227	246	250	235	215	224	224	234	10	4.5%
Entertainment	562	596	561	539	515	529	516	522	6	1.2%
Food	1,043	1,062	1,095	1,069	1,085	1,107	1,151	1,204	53	4.6%
Establishments	**1,832**	**1,904**	**1,906**	**1,843**	**1,815**	**1,860**	**1,891**	**1,960**	**69**	**3.6%**
Drink	4,310	4,260	4,925	4,885	3,585	3,740	3,445	3,635	190	5.5%
Entertainment	3,975	5,585	5,120	5,280	3,415	5,025	4,755	5,175	420	8.8%
Food	13,100	12,165	12,015	12,720	11,630	12,710	13,350	14,515	1,165	8.7%
Employment	**21,390**	**22,005**	**22,060**	**22,890**	**18,630**	**21,475**	**21,550**	**23,330**	**1,780**	**8.3%**
Drink	$415	$402	$533	$529	$433	$420	$461	$435	-$27	-5.8%
Entertainment	$500	$688	$667	$623	$406	$781	$753	$804	$50	6.7%
Food	$1,104	$1,057	$1,091	$1,085	$1,141	$1,191	$1,293	$1,406	$113	8.7%
Turnover (A$m)	**$2,019**	**$2,147**	**$2,291**	**$2,237**	**$1,980**	**$2,393**	**$2,508**	**$2,645**	**$137**	**5.4%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_State

Table 42: City of Hobart – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	71	70	69	64	59	62	59	61	2	3.4%
Entertainment	118	118	115	119	123	118	107	101	-6	-5.6%
Food	264	278	295	297	298	301	278	307	29	10.4%
Establishments	**453**	**466**	**479**	**480**	**480**	**481**	**444**	**469**	**25**	**5.6%**
Drink	1,215	995	1,020	1,075	1,060	1,100	1,145	1,060	-85	-7.4%
Entertainment	1,285	1,370	1,270	1,565	1,485	1,445	1,410	1,325	-85	-6.0%
Food	3,395	3,085	3,165	3,245	3,480	3,600	4,040	4,185	145	3.6%
Employment	**5,895**	**5,445**	**5,455**	**5,885**	**6,020**	**6,145**	**6,595**	**6,575**	**-20**	**-0.3%**
Drink	$110.5	$96.8	$92.7	$99.4	$103.2	$104.0	$111.4	$104.5	-$6.9	-6.2%
Entertainment	$154.1	$160.4	$156.6	$197.8	$179.7	$198.6	$204.5	$197.9	-$6.6	-3.2%
Food	$286.2	$268.0	$287.8	$299.9	$339.0	$341.1	$391.3	$406.0	$14.6	3.7%
Turnover (A$m)	**$550.8**	**$525.2**	**$537.1**	**$597.1**	**$621.9**	**$643.7**	**$707.3**	**$708.4**	**$1.1**	**0.2%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

10.3.7. Victoria

Table 43: Victoria – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	2,286	2,284	2,262	2,229	2,284	2,327	2,338	2,371	33	1.4%
Entertainment	7,746	7,999	7,854	7,659	7,750	7,908	7,969	8,262	293	3.7%
Food	14,327	15,807	16,173	16,236	17,013	17,650	18,559	19,224	665	3.6%
Establishments	**24,359**	**26,090**	**26,289**	**26,124**	**27,047**	**27,885**	**28,866**	**29,857**	**991**	**3.4%**
Drink	30,485	30,745	26,250	25,405	27,085	27,010	27,860	28,080	220	0.8%
Entertainment	53,730	56,850	49,775	51,760	54,305	59,910	63,785	66,675	2,890	4.5%
Food	136,765	153,165	150,465	151,710	158,225	159,360	167,440	176,005	8,565	5.1%
Employment	**220,980**	**240,765**	**226,490**	**228,880**	**239,615**	**246,280**	**259,085**	**270,760**	**11,675**	**4.5%**
Drink	$3,503	$3,597	$3,395	$3,366	$3,706	$3,869	$4,197	$4,261	$63	1.5%
Entertainment	$6,927	$7,139	$6,532	$6,081	$6,795	$10,298	$11,009	$11,350	$341	3.1%
Food	$11,527	$13,313	$13,670	$14,660	$15,529	$14,937	$16,220	$17,049	$829	5.1%
Turnover (A$m)	**$21,958**	**$24,048**	**$23,597**	**$24,107**	**$26,029**	**$29,105**	**$31,426**	**$32,660**	**$1,233**	**3.9%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_State

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Table 44: City of Melbourne – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	256	254	258	240	260	273	265	248	-17	-6.4%
Entertainment	456	495	501	468	488	475	473	468	-5	-1.1%
Food	1,325	1,639	1,686	1,658	1,732	1,652	1,697	1,689	-8	-0.5%
Establishments	**2,037**	**2,388**	**2,445**	**2,366**	**2,480**	**2,400**	**2,435**	**2,405**	**-30**	**-1.2%**
Drink	3,655	3,305	3,160	3,470	3,645	3,625	3,385	3,285	-100	-3.0%
Entertainment	6,430	5,300	5,470	5,590	5,560	5,210	5,520	5,420	-100	-1.8%
Food	13,860	15,640	16,000	16,780	17,370	18,230	19,385	21,665	2,280	11.8%
Employment	**23,945**	**24,245**	**24,630**	**25,840**	**26,575**	**27,060**	**28,290**	**30,370**	**2,080**	**7.4%**
Drink	$360.2	$345.0	$287.0	$320.6	$355.3	$343.2	$326.8	$307.1	-$19.7	-6.0%
Entertainment	$770.8	$621.7	$674.6	$707.7	$673.8	$716.8	$816.8	$810.4	-$6.4	-0.8%
Food	$1,168.1	$1,359.5	$1,453.5	$1,550.8	$1,692.3	$1,726.6	$1,878.5	$2,101.4	$222.8	11.9%
Turnover (A$m)	**$2,299.1**	**$2,326.2**	**$2,415.1**	**$2,579.1**	**$2,721.4**	**$2,786.7**	**$3,022.2**	**$3,218.9**	**$196.7**	**6.5%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

Table 45: Maroondah City Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	24	26	21	18	18	16	20	21	1	5.0%
Entertainment	112	121	115	102	96	78	94	98	4	4.3%
Food	197	216	221	212	231	224	239	244	5	2.1%
Establishments	**333**	**363**	**357**	**332**	**345**	**318**	**353**	**363**	**10**	**2.8%**
Drink	215	260	240	270	265	265	285	295	10	3.5%
Entertainment	1,135	890	900	855	800	625	625	735	110	17.6%
Food	1,275	1,365	1,465	1,420	1,530	1,575	1,850	1,745	-105	-5.7%
Employment	**2,630**	**2,520**	**2,600**	**2,545**	**2,590**	**2,470**	**2,755**	**2,775**	**20**	**0.7%**
Drink	$29.8	$36.2	$21.6	$24.9	$25.6	$25.2	$30.3	$31.4	$1.0	3.4%
Entertainment	$136.3	$104.6	$110.7	$108.0	$96.8	$86.3	$92.0	$112.0	$20.0	21.7%
Food	$107.5	$118.8	$133.1	$131.4	$149.0	$149.1	$179.3	$169.5	-$9.8	-5.4%
Turnover (A$m)	**$273.6**	**$259.6**	**$265.4**	**$264.3**	**$271.4**	**$260.7**	**$301.6**	**$312.9**	**$11.3**	**3.7%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

Table 46: Port Phillip City Council – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	Change 2016-17 Number	Percentage
Drink	112	115	109	114	117	119	113	105	-8	-7.1%
Entertainment	466	483	468	453	473	454	479	485	6	1.3%
Food	506	577	591	580	608	627	648	684	36	5.6%
Establishments	**1,084**	**1,175**	**1,168**	**1,147**	**1,198**	**1,200**	**1,240**	**1,274**	**34**	**2.7%**
Drink	1,605	1,565	1,540	1,570	1,625	1,560	1,465	1,500	35	2.4%
Entertainment	3,440	3,540	3,690	3,560	3,840	4,010	4,125	4,270	145	3.5%
Food	5,310	5,465	6,070	6,345	6,720	6,990	7,485	8,075	590	7.9%
Employment	**10,360**	**10,565**	**11,300**	**11,475**	**12,190**	**12,555**	**13,070**	**13,845**	**775**	**5.9%**
Drink	$172.5	$174.3	$139.8	$145.3	$158.4	$147.8	$145.1	$146.4	$1.3	0.9%
Entertainment	$412.4	$415.1	$455.1	$450.6	$465.6	$551.7	$614.1	$662.9	$48.8	7.9%
Food	$447.5	$474.9	$551.3	$586.5	$654.9	$661.9	$725.2	$783.2	$58.0	8.0%
Turnover (A$m)	**$1,032.4**	**$1,064.3**	**$1,146.2**	**$1,182.4**	**$1,278.9**	**$1,361.3**	**$1,484.5**	**$1,592.5**	**$108.1**	**7.3%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

10.3.8. Western Australia

Table 47: Western Australia – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

| Measure / Sector | 2009 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | Change 2016-17 | |
									Number	Percentage
Drink	912	933	928	927	929	951	956	980	24	2.5%
Entertainment	2,420	2,524	2,498	2,411	2,437	2,519	2,576	2,640	64	2.5%
Food	4,635	4,979	5,094	5,123	5,497	5,862	6,113	6,333	220	3.6%
Establishments	**7,967**	**8,436**	**8,520**	**8,461**	**8,863**	**9,332**	**9,645**	**9,953**	**308**	**3.2%**
Drink	16,175	17,350	16,685	18,245	14,635	16,430	16,915	17,275	360	2.1%
Entertainment	14,870	17,710	18,890	18,745	19,090	18,855	19,385	19,465	80	0.4%
Food	63,555	69,545	72,295	72,125	72,985	74,110	75,265	80,190	4,925	6.5%
Employment	**94,605**	**104,605**	**107,870**	**109,115**	**106,710**	**109,395**	**111,565**	**116,935**	**5,370**	**4.8%**
Drink	$1,973	$2,248	$2,125	$2,410	$1,883	$2,338	$2,473	$2,635	$162	6.6%
Entertainment	$1,881	$2,191	$2,477	$2,345	$2,384	$3,142	$3,275	$3,206	-$69	-2.1%
Food	$5,357	$6,045	$6,568	$7,102	$7,163	$6,947	$7,291	$7,768	$477	6.5%
Turnover (A$m)	**$9,211**	**$10,484**	**$11,170**	**$11,856**	**$11,430**	**$12,427**	**$13,038**	**$13,609**	**$571**	**4.4%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_State

Table 48: City of Perth[17] – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

| Measure / Sector | 2009 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | Change 2016-17 | |
									Number	Percentage
Drink	91	98	109	116	100	91	80	87	7	8.8%
Entertainment	129	131	126	128	113	98	62	65	3	4.8%
Food	457	502	516	534	556	599	456	453	-3	-0.7%
Establishments	**677**	**731**	**751**	**778**	**769**	**788**	**598**	**605**	**7**	**1.2%**
Drink	1,775	1,590	1,755	2,010	1,930	1,940	1,900	1,940	40	2.1%
Entertainment	2,150	1,810	1,490	1,405	1,385	1,330	1,190	1,045	-145	-12.2%
Food	6,505	6,245	6,365	6,795	6,490	7,335	6,735	6,445	-290	-4.3%
Employment	**10,430**	**9,640**	**9,610**	**10,210**	**9,805**	**10,600**	**9,825**	**9,430**	**-395**	**-4.0%**
Drink	$170.4	$158.5	$159.5	$185.8	$187.9	$183.6	$184.3	$188.1	$3.8	2.0%
Entertainment	$257.5	$211.9	$183.6	$177.7	$167.6	$183.0	$170.5	$148.5	-$22.0	-12.9%
Food	$548.3	$542.7	$578.2	$628.0	$632.6	$694.6	$652.6	$625.2	-$27.4	-4.2%
Turnover (A$m)	**$976.2**	**$913.1**	**$921.3**	**$991.5**	**$988.1**	**$1,061.1**	**$1,007.4**	**$961.7**	**-$45.7**	**-4.5%**

Based on 2018 Australian Bureau of Statistics data (CABEE 2013-2017 dataset), Ref: WTS1/3_LGA

[17] Please note that the Perth LGA boundary was revised in 2016 and is also affected by a change in ABS methodology, both of which cause a disconnect in the time series from 2015 to 2016. For additional details please see Section 10.2.3, page 31.

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10.4. Core NTE density rankings

Table 49: Ranking of Core NTE establishments density per km² across the 88 LGAs analysed – part one

Position	LGA Name	State	Establishments	Density Per km²
1	City of Sydney	NSW	4,872	182.5
2	Waverley Council	NSW	702	74.7
3	North Sydney Council	NSW	738	70.3
4	Yarra City Council	VIC	1,305	66.9
5	City of Melbourne	VIC	2,405	64.3
6	Port Phillip City Council	VIC	1,274	61.5
7	City of Adelaide	SA	808	51.8
8	City of Perth	WA	605	44.2
9	Inner West Council	NSW	1,512	42.7
10	Woollahra Municipal Council	NSW	511	41.5
11	Burwood Council	NSW	289	40.7
12	City of Stonnington	VIC	985	38.3
13	City of Canada Bay Council	NSW	608	30.6
14	Willoughby Council	NSW	587	26.2
15	Randwick City Council	NSW	828	22.8
16	Glen Eira City Council	VIC	828	21.4
17	Georges River Council	NSW	788	20.6
18	City of Boroondara	VIC	1,236	20.5
19	Maribyrnong City Council	VIC	569	18.2
20	Bayside City Council	VIC	635	17.1
21	Moreland City Council	VIC	850	16.7
22	City of Ryde	NSW	648	16.0
23	City of Darebin	VIC	848	15.9
24	Bayside Council	NSW	769	15.4
25	Moonee Valley City Council	VIC	637	14.8
26	City of Parramatta	NSW	1,171	14.0
27	City of Monash	VIC	1,130	13.9
28	City of Whitehorse	VIC	884	13.7
29	Cumberland Council	NSW	891	12.4
30	City of Canterbury Bankstown	NSW	1,289	11.7
31	City of Charles Sturt	SA	485	8.9
32	City of Stirling	WA	911	8.7
33	Kingston City Council	VIC	768	8.4
34	City of Burnside	SA	223	8.1
35	Banyule City Council	VIC	492	7.9
36	Hobsons Bay City Council	VIC	436	6.8
37	Manningham City Council	VIC	736	6.5
38	Fairfield City Council	NSW	656	6.5
39	Ku-ring-gai Council	NSW	547	6.4
40	City of Hobart	TAS	469	6.0
41	Maroondah City Council	VIC	363	5.9
42	Northern Beaches Council	NSW	1,418	5.6
43	City of Joondalup	WA	550	5.6
44	City of Brimbank	VIC	641	5.2

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Table 50: Ranking of Core NTE establishments density per km² across the 88 LGAs analysed – part two

Position	LGA Name	State	Establishments		Density Per km²
45	City of Greater Dandenong	VIC	663		5.1
46	Knox City Council	VIC	580		5.1
47	Brisbane City Council	QLD	6,196		4.6
48	City of Newcastle	NSW	822		4.4
49	City of Blacktown	NSW	904		3.8
50	City of Darwin	NT	409		3.7
51	City of Frankston	VIC	406		3.1
52	City of Mitcham	SA	227		3.0
53	Sutherland Shire Council	NSW	990		3.0
54	City of Gold Coast	QLD	3,216		2.4
55	City of Casey	VIC	914		2.2
56	Liverpool City Council	NSW	593		1.9
57	The Hills Shire Council	NSW	731		1.9
58	Wyndham City	VIC	730		1.3
59	Penrith City Council	NSW	515		1.3
60	City of Whittlesea	VIC	611		1.2
61	Hume City Council	VIC	609		1.2
62	Hornsby Shire Council	NSW	527		1.2
63	Campbelltown City Council	NSW	355		1.1
64	Wollongong City Council	NSW	776		1.1
65	Mornington Peninsula Shire	VIC	735		1.0
66	Lake Macquarie City Council	NSW	582		0.9
67	City of Greater Geelong	VIC	949		0.8
68	Central Coast Council	NSW	1,189		0.7
69	Albury City Council	NSW	207		0.7
70	Melton City Council	VIC	351		0.7
71	Sunshine Coast Council	QLD	1,396		0.6
72	Maitland City Council	NSW	241		0.6
73	City of Ballarat	VIC	441		0.6
74	Byron Shire	NSW	327		0.6
75	Nillumbik Shire Council	VIC	246		0.6
76	Moreton Bay Regional Council	QLD	1,042		0.5
77	Cairns Regional Council	QLD	755		0.4
78	City of Wodonga	VIC	115		0.3
79	Port Stephens Council	NSW	216		0.3
80	City of Launceston	TAS	310		0.2
81	Townsville City Council	QLD	601		0.2
82	City of Greater Bendigo	VIC	393		0.1
83	Hawkesbury City Council	NSW	298		0.1
84	Port Macquarie-Hastings Council	NSW	307		0.1
85	Mackay Regional Council	QLD	311		0.0
86	Toowoomba Regional Council	QLD	527		0.0
87	Bathurst Regional Council	NSW	155		0.0
88	Queanbeyan-Palerang Regional Council	NSW	184		0.0

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