Measuring the Australian Night Time Economy 2019-20

A project for the Council of Capital City Lord Mayors

Ingenium Research

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Glossary of terms

Term	Definition
ABS	Australian Bureau of Statistics – the national provider of official government statistics.
ANZSIC	Australian and New Zealand Standard Industrial Classification – a method of assigning establishments to a standardised set of activity
Employment	The number of employees associated with the establishment(s). Elements of charts and infographics relating to employment throughout this report are coloured red.
Establishment(s)	Actively trading business(es) recorded in the Australian Bureau of Statistics Business Register (ABSBR) as at 30th June in each reporting year. Elements of charts and infographics relating to establishments throughout this report are coloured blue.
LGA	Local Government Area – the municipal geographic area of a local council.
NTE	Night Time Economy – economic activity which occurs at establishments primarily between the hours of 6 p.m. and 6 a.m. The NTE can be broken down into Core, Non-Core and Supply as per the table below. The focus of this report is the Core NTE.
SA2	Statistical Area 2 – An ABS geographic area classification defined using the Census of Population and Housing.
Turnover ($m)	The sales and service income generated by the establishment(s), exclusive of goods and service tax (GST). Elements of charts and infographics relating to turnover throughout this report are coloured green.

Sector	Description
Core NTE	The activities that provide primary establishment services to leisure users between 6pm and 6am. The Core NTE is split into sub-sectors of Drink, Entertainment and Food and then further sub-divided.
Non-Core NTE	Establishments that may operate across the 24-hour day and some of which provide integral services to Core NTE leisure activities. These include public and private transport, hotels and other forms of accommodation, retail services and public services such as policing, health services, parking, and lighting.
Supply NTE	Supply NTE establishments tend to operate during the day but are part of the Core NTE supply chain via the production or wholesaling of Food, Drink or Entertainment products for resale in leisure outlets.
Non-NTE	This refers to all the other economic activities outside the NTE definition.
Total Economy	This is the sum of all economic activity within a defined geography.

Methodology note. Detailed economic data in this report is sourced from the ABS Counts of Australian Businesses, including Entries and Exits. This data has some limitations; in that it reflects the primary activity of the business and does not define the temporal nature of its activity, however, the approach provides the best estimate available for NTE activity using ANZSICs that are most likely to be open between 6pm and 6am based on prior research. For further methodological detail, see Appendix 4.1 (p68).

1. The Australian Night Time Economy

1.1. About this report

The Council of Capital City Lord Mayors have been commissioning annual analysis to measure the size of the Australian Night Time Economy (NTE), with data available since 2009. The NTE is defined as economic activity occurring between 6pm and 6am and is split into Core, Non-Core and Supply sectors. This report focuses on the Core NTE, which consists of Food, Drink and Entertainment (consumption) businesses and these businesses' economic performance in the latest financial year for which official data is available (2019-20).

1.2. Introduction

The year 2020 was one unlike any other in modern times. The COVID-19 pandemic wreaked havoc on communities and economies across the globe, with all countries being affected by the virus. Despite a prolonged second wave in Victoria and further outbreaks since then, Australia has controlled the virus better than most countries, through closed borders and strong lockdown measures.

The initial impacts of COVID-19 were devastating to many Australian businesses, although a high proportion were able to enrol in the Federal Government's JobKeeper scheme to retain and support their employees. One of the sectors most affected was Accommodation and Food Services – a key subset of the NTE, with many cafés and restaurants required to shut their doors and offer takeaway services only. This impact is reflected in JobKeeper statistics, which show the sector had the highest proportion of businesses receiving JobKeeper payments in April 2020 (56% of all businesses)[i]. It is also evident in the Australian Bureau of Research (ABS) Business Indicators Business Impacts of COVID-19 Survey[ii], which found that in June 2020, 84% of these businesses had experienced a decline in revenue compared to the same period in the previous year. Of those businesses that had reported a decline, 63% reported a decrease in revenue of more than 50%.

Following the emergence from lockdowns, night-time businesses needed to adapt to changing conditions such as physical distancing restrictions, density limits, the lack of international tourism, new home working arrangements and the postponement or cancellation of events and festivals - all of which led to significant drops in people movement and visitation to city CBDs[iii].

Prior to the pandemic, CCCLM research established that the Australian NTE had achieved a record run of continuous growth, with many years performing better than the total economy. Conditions for NTE businesses have generally improved since the early days of the pandemic – although challenges and uncertainties remain. As such, it is crucial to understand what impact the early days may have had on the sector, so that policy makers can make evidence-based decisions on support for the NTE in their areas.

This research focuses primarily on data from the 2019-20 financial year, depicting the early impact of the pandemic on Australia's NTE. For many businesses, falls in employment and sales turnover were temporary, although the ongoing nature of the pandemic is continually altering the economic landscape. While this report does provide evidence of more recent impacts, the longer-term impact on businesses will not be known until the release and analysis of official 2020-21 financial year data.

The report commences by framing the Australian impacts within a global context, followed by analysis of state / territory data, and a review of each member city of CCCLM's Local Government Safe Cities Network (LGSCN).

This report aims to support Australia in retaining and growing its safe and vibrant NTE in a changing world.

1.3. The impact of COVID-19 on the NTE

1.3.1. The global reaction to the impact of COVID-19

NTEs worldwide have been impacted by the lockdowns and physical distancing requirements of the pandemic. For example, a sample of data from c49 countries analysed by the International Labour Organization (ILO) showed that, employment in the Accommodation and Food Services sector fell by -20% between Q2 2019 and Q2 2020[iv], while the working hours fell by -33% during the same period. The same report shows that Other Services (which includes "arts, entertainment and recreation", "other service activities" and "activities of households as employers") experienced the second highest declines; -13% between Q2 2019 and Q2 2020 and a fall in hours of -21% across the same period. Another ILO report estimated the pandemic led to job losses for 18 million Accommodation and Food workers worldwide[v].

Prior to the onset of the pandemic, many cities had been developing NTE specific governance structures with more than 60 cities having appointed night time leaders and/or committees[vi]. These structures act as a holistic point of liaison between NTE stakeholders and government to ensure alignment of ideas, to explore the impact of developments, and to facilitate connected strategic planning in specific local environments.

It is reasonable to assume that none of these initiatives had any inkling of what COVID-19 might have in store for them – and it would not be unreasonable to state that, across the globe, leaders of countries and cities still seek to understand how they may successfully emerge from the pandemic. The unprecedented and acute impact of the pandemic on the sector has resulted in nightlife leaders coming together to share ideas and findings. Examples of some of these knowledge sharing forums are presented below.

RHI's Sociable City Summit

The Responsible Hospitality Institute (RHI) has been providing resources and consultation services on nightlife in the USA since 1983. In April 2021, it hosted its annual Sociable City Summit as a virtual event[vii]. The event brought together more than 80 speakers and panellists from all sections of the NTE, including law enforcement agencies, nightlife associations, government, consultants and business to discuss approaches to addressing both the impact of immediate change and the longer term re-emergence of the sector.

The Global Nighttime Recovery Plan[viii] is the result of collaboration between more than 130 nightlife experts from across over 70 cities coordinated by nightlife advocacy agency VibeLab. The plan is a series of chapters guiding cities on various practices implemented to reactivate nightlife following the impact of the COVID-19 pandemic. Topics covered include utilising outdoor space, the future of dance floors, 24-hour cities, nightlife workers, governance and government policy support models.

Global Nighttime Recovery Plan

Global Cities After Dark Conference

Global Cities After Dark (GCAD)[ix] is an Asia Pacific forum focused on the future of nightlife and the social economy, a partnership between VibeLab and Electronic Music Conference Director Jane Slingo. In March 2021, the GCAD Conference took place as a hybrid event in Sydney. While Australia's borders remained closed, keynote speakers from across the globe presented virtually, while the audience was provided with an opportunity to discuss key night time issues and brainstorm potential solutions presented by the latest pandemic challenges.

1.3.2. Australian impact

Employment

The impacts of COVID-19 and its associated restrictions on Australian businesses and communities during the early months of the pandemic were substantial. ABS' Weekly Payroll Jobs and Wages dataset paints a stark picture of this impact, with employment across all industries falling nearly 9% in the space of a month from its pre-COVID peak (14th March 2020 to 11th April 2020). While this was unprecedented, the impacts on two key industries were particularly devastating – Accommodation and Food services and Arts and Recreation Services, with losses of -35% and -30% respectively, as can be seen in Figure 1, below.

Figure 1: Indexed trend in employment from January 2020 to June 2021 (14th March 2020 = 100)
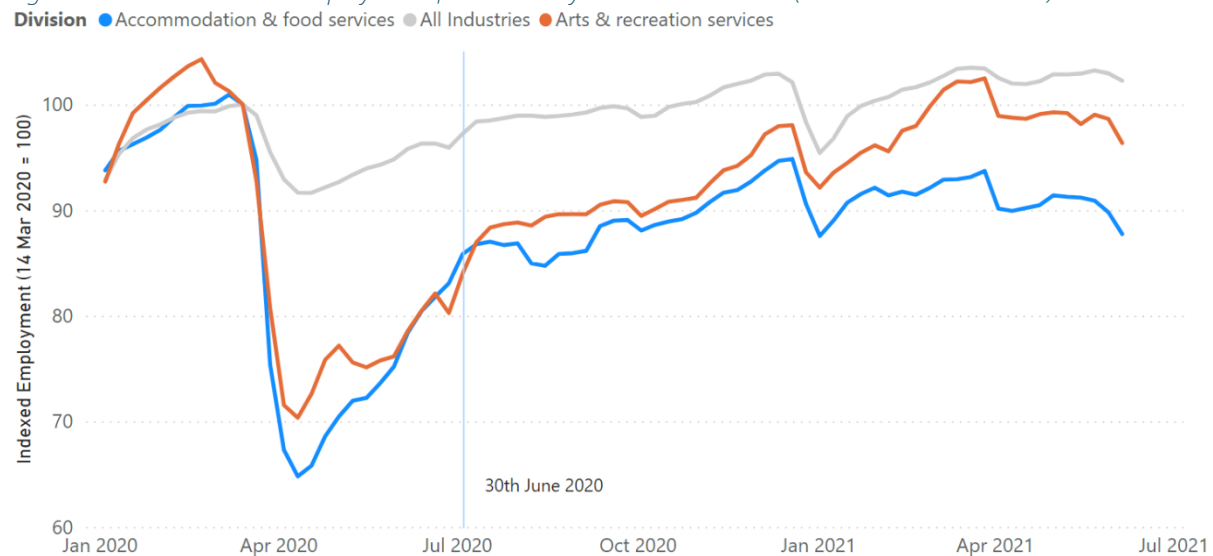
Source: ABS Weekly Payroll Jobs and Wages from January 2020 to May 2021

By June 2020 (the end point of economic data focus in this report) some recovery had been achieved, but employment remained c20% down from the March 2020 peak.

From July 2020 to May 2021 these two sectors remained below their pre-COVID baseline. While Arts and Recreation Services have almost returned to normal, Accommodation and Food Services employment is still 10% below the March 2020 peak. Research by the National Skills Commission[x] notes that positions such as waiters, bar tenders/baristas and kitchenhands saw the greatest rebounds after the largest declines.

The recent Federal Budget Papers[xi], noted that, part-time and casual workers were particularly affected during this period, resulting in women and young people being more likely to have lost work.

The impact of Australia's border closures may be a factor in slower uplifts in performance. Many states and territories are noting a critical shortage of hospitality workers, with positions often taken up by those on working holiday or international student visas proving difficult to fill. In June 2021, 38% of Accommodation and Food and 22% of Arts and Recreation businesses reported having difficulty finding suitable staff[xii]. With borders set to be closed until at least mid-2022, recent rule changes[xiii] allowing international students to work more than 40 hours per fortnight may help in alleviating this skill shortage.

While federal schemes such as JobKeeper have acted as lifelines to businesses in these sectors, many councils and state / territory governments quickly mobilised to provide additional support to establishments, through their own grant schemes or programs to assist these businesses.

Without these interventions, it is likely the initial impacts would have been sustained for much longer, with more permanent business closures and a more prolonged decline in the NTE. While this report focusses on the latest economic data to the end of the 2020 financial year, some early signs of recovery have been observed, which can be explored and further compared in detail once key official data is released for the 2020/21 financial year.

People movement

Google mobility reports use mobile device users' anonymised location history data to track the number of visits to specific locations (similar to footfall counts). The data is helpful in understanding changes in people's behaviours and comparing the relative impact of the pandemic across geographic areas. While employment figures initially showed a sharp drop, followed by some recovery, a similar picture emerges when looking at mobility. As can be seen in Figure 2 below, mobility data mirrors employment data, with visits to workplaces and retail and recreation sites falling by 46% and 45% respectively, while time spent at residential locations increased by 20% between 14 March and 11 April 2020.

Figure 2: Indexed trend in people movement from February 2020 to June 2021
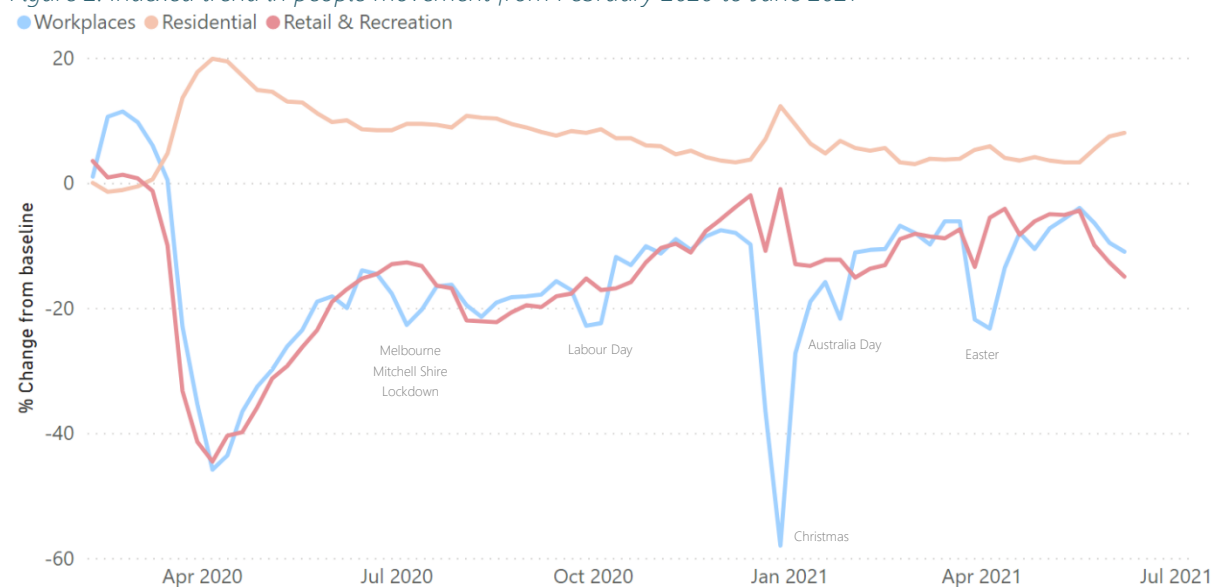
Source: Google Mobility data for Australia from February 2020 to May 2021

Visits to retail and recreation sites improved slightly in the run up to the end of the financial year, which aligns with the increases in employment in Figure 1. The trends in visits to retail and recreation locations and workplaces are closely aligned. This alignment has been recognised by city councils whose CBDs have been particularly hard hit by COVID-19 associated restrictions and work from home protocols. Councils have looked to introduce innovative approaches such as vouchers to entice patrons back to the city. As demonstrated in the later months in Figure 2, these initiatives do seem to be yielding some success, although Australia's suppression of the virus is likely a contributing factor.

Key dates

The table below provides key events relating to COVID-19 and the NTE across 2020, to provide context to the trends demonstrated in Figure 1 and Figure 2.

January 2020	25th January	First case of COVID-19 recorded in Australia
March 2020	1st March	First death from COVID-19 recorded in Australia
	12th March	$17.6bn Federal Government economic plan to support jobs, businesses and households announced (first stage)
	18th March	National restrictions on gatherings, overseas travel, aged care announced and ANZAC day ceremonies cancelled
	20th March	National restriction on non-residents entering Australia commences
	22nd March	Federal Government announces $66.1bn economic support package (second stage)
	30th March	Federal JobKeeper scheme announced
May 2020	8th May	National three step plan for easing restrictions announced
June 2020	30th June	Lockdown commences in ten Melbourne postcodes
July 2020	8th July	Melbourne and Mitchell Shire enter 6-week lockdown
August 2020	28th August	JobKeeper extension 1 commences
September 2020	2nd September	ABS announce Australian GDP fell 7% in the June quarter, with the country officially entering recession
	13th September	Melbourne moves from stage four restrictions to the first step of the roadmap to reopening
November 2020	8th November	Boundary between metro and regional Victoria removed and 25km distance limit no longer in place
	19th November	South Australia enters six-day circuit breaker lockdown
December 2020	2nd December	Australia out of recession, with 3.3% increase in GDP in the September quarter
	19th December	Northern Beaches stay at home orders commence

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1.4. Australian NTE performance in 2019/20

1.4.1. Overview

Prior to 2019/20, the Australian NTE had achieved a record run of sustained growth. The number of Core NTE establishments has continued to grow in 2019/20 (+2.5%) to over 113,700 establishments – a greater percentage increase than the total economy (+2%). This is likely a reflection of pre-pandemic activity, with business entry and exit rates comparable to previous years.

Unfortunately, the impact of the COVID-19 pandemic and the associated measures put in place to suppress the virus such as lockdowns, physical distancing and density requirements, had a more immediate and devastating impact on the sector's employees and revenue position. The impact on the Core NTE was disproportionately large when compared to the Non-Core NTE, Supply NTE and the wider economy.

Core NTE employment fell by just over 20% between June 2019 and June 2020, reducing from over 1.1m employees to just under 900k.

Measure	Core NTE 19/20 & Change from 18/19	% Total Economy
Establishments	113,726 +2.5%	4.7%
Employment	894,910 -20.4%	8.7%
Sales Turnover	$127.6bn -8.6%	3.7%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-20)

There have been signs of recovery, but many establishments are still operating below their pre-COVID peak.

Sales turnover was severely impacted, falling 9% (or $12bn) between June 2019 and June 2020 to $127.6bn. As noted recently by the ABS[xiv], the measures put in place by federal and state/territory governments to support the Accommodation and Food Services have been effective but not quite enough to stave off a fall in Earnings Before Interest, Taxes, Depreciation, and Amortization brought about by the pandemic.

Figure 3 shows that employment declined by -3.8% in the total economy (driven by losses in the NTE), while sales turnover increased slightly (+2.4%), and above inflation (+1.3%).

Figure 3: Percentage change in establishments, employment and sales turnover 2018/19 to 2019/20

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1.4.2. Sub-sectoral performance

The growth in Australia's NTE establishments in 2019/20 was primarily driven by the Entertainment sub-sector, which increased by +4.7% (+1,530 establishments, representing 30% of Core NTE establishments).

While Entertainment establishment growth is likely reflective of pre-COVID activity, employment (-29%) and sales turnover (-9%) experienced substantial declines because of the pandemic. Within Entertainment, employment in Sports and Physical Recreation (-33% / -31,105 employees) and the Creative and Performing Arts (-32% / -15,295 employees) was particularly impacted during the first three months of the pandemic (March to June 2020), a consequence of lockdowns and social distancing restrictions.

While Entertainment was hard hit, recent employment trends (explored in Section 1.3.2) noted substantial improvement in the months after June 2020, suggesting signs of recovery, although considerable challenges remain.

Food and Drink did not experience such sharp declines initially, but equally, as noted in Section 1.3.2 (p8), have not seen as strong a recovery.

As the largest NTE sub-sector, Food's 70,715 establishments account for 62% of Core NTE establishments, 65% of employment and 52% of sales turnover. While the proportional loss in employment (-18%) was lower than in the Entertainment sub-sector, the absolute loss in jobs was much greater, with 125,000 fewer employees in June 2020 than in June 2019. Many cafés and restaurants pivoted to provide takeaway services and outdoor dining, where possible, but there are often substantial costs involved in pivoting business models and losses in income were incurred.

Finally, the number of establishments in the Drink sub-sector remained static (8,629 in June 2020). Drink's employment decreased by a similar proportion to the Food sub-sector (-17%) driven mainly by losses in Pubs, Taverns and Bars (-19% / -22,000). Liquor Retailing experienced a small decline in employment (-5%) and growth in sales turnover (+9% / +$698m), as patrons switched to home consumption. This helped the Drink sub-sector maintain sales turnover of $19.3bn (a loss of -2.8% on 2019).

Sub-sector	Measure & Change 19-20	% Core NTE
Establishments		
Drink	8,629 +0.0%	8%
Entertainment	34,382 +4.7%	30%
Food	70,715 +1.8%	62%
Employment		
Drink	110,245 -17.2%	12%
Entertainment	200,450 -28.9%	22%
Food	584,210 -17.6%	65%
Turnover		
Drink	$19.3bn -2.8%	15%
Entertainment	$42.3bn -9.3%	33%
Food	$66.0bn -9.6%	52%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

2.   The Australian NTE in the states and territories

2.1.   Overview

As might be expected, the impact of the pandemic on the NTE has varied by state and territory. The NTE establishment growth rate across Australia between June 2019 and June 2020 was 2.5%, driven by strong performance within Victoria, which gained +5.5% (1,754) establishments between June 2019 and June 2020 (Table 1). This performance was matched only by Tasmania, where the number of establishments increased by +5.5% (+120). Nearly all other states and territories experienced establishment growth below the Australian average – with Western Australia (-0.1%) and Australian Capital Territory (-0.4%) recording contractions in their establishment bases.

Victoria's strong growth in establishments meant it continued to gain on New South Wales, which had 1.5% growth in establishments. While establishment growth was strong in Victoria, initial pandemic losses in Core NTE employment (-19%) and sales turnover (-7%) were substantial (although less than the Australian average).

In terms of volume of decline, New South Wales has experienced the greatest loss in Core NTE employment (-92,760 / -27%) and turnover (-$4,389m / -10%), reducing to 249,960 employees and $38.4bn, respectively.

Queensland's establishment base marginally increased (+0.7%) but endured heavy losses in employment (-43,675 / -20%) and sales turnover (-$2,729m / -10%) driven primarily by substantial declines in the Entertainment sub-sector. In South Australia, performance was similar to the national average but with slightly less employment and turnover loss.

Table 1: Core NTE by state/territory in 2019/20 with change from 2018/19 to 2019/20

State/Territory	Establishments		Employment		Turnover ($m)	
	Number	% Change 19-20	Number	% Change 19-20	Number	% Change 19-20
New South Wales	38,357 ⬆	1.5%	249,960 ⬇	-27.1%	$38,417 ⬇	-10.3%
Victoria	33,553 ⬆	5.5%	232,015 ⬇	-19.3%	$34,193 ⬇	-7.4%
Queensland	19,879 ⬆	0.7%	178,780 ⬇	-19.6%	$24,183 ⬇	-10.1%
Western Australia	10,276 ⬇	-0.1%	103,200 ⬇	-14.3%	$14,332 ⬇	-3.7%
South Australia	6,763 ⬆	2.4%	65,770 ⬇	-16.7%	$8,583 ⬇	-8.1%
Tasmania	2,289 ⬆	5.5%	21,615 ⬇	-9.7%	$2,623 ⬇	-10.4%
Australian Capital Territory	1,811 ⬇	-0.4%	31,050 ⬆	4.0%	$3,352 ⬇	-3.2%
Northern Territory	783 ⬆	3.4%	12,525 ⬇	-31.8%	$1,912 ⬇	-15.8%
Australia	113,726 ⬆	2.5%	894,910 ⬇	-20.4%	$127,596 ⬇	-8.6%

Source: Based on Australian Bureau of Statistics CABEE 2016-2020 dataset, Ref: WTS1/S5

It is clear that the two territories experienced the pandemic very differently to one another. The Australian Capital Territory bucked the trend, as the only area to experience an increase in Core NTE employment (+4.0%) and a modest decrease in turnover (-3.2%). This was driven by the Food sub-sector, likely due to pre-pandemic economic growth combined with fewer COVID-19 cases and associated lockdowns, relative to some states and territories. Northern Territory on the other hand experienced above average establishment growth (+3.4%) but the largest percentage decreases in employment (-32%) and sales turnover (-16%).

It should be noted that these performance figures relate to the first three months of the pandemic. Utilising the ABS Weekly Payroll Jobs and Wages dataset, it is possible to gain an indicative view of the recovery in each area, which is explored overleaf through the lens of the Accommodation and Food Services sector.

Figure 4: Indexed trend in Accommodation and Food Services employment across states/territories (Jan 2020 to May 2021)

Figure 4 shows employment trends from January 2020 to May 2021 for Accommodation and Food Services, which include a large proportion of the Food and Drink NTE sub-sector definitions. These trends suggest the following outlook for each state in 2021 (bearing in mind future outbreaks or other factors could alter this):

New South Wales

While the Core NTE has experienced heavy losses, recent trends in Accommodation and Food Services suggest the state is likely to experience a small recovery in Food and/or Drink, having maintained consistent employment (of 90% of pre-COVID peak) since August 2020.

Following a tough second wave between July and October 2020, Victoria has seen strong growth since November, with employment in May 2021 approximately 10% higher than June 2020. However, Victoria's recent lockdown in June 2021 may set back this performance leading to minimal annual growth.

Victoria

Queensland

Similar to NSW, Queensland could experience a small recovery in Food and/or Drink, having maintained consistent employment in Accommodation and Food Services (at approx. 90% of pre-COVID peak) since August 2020.

The state has recovered well, reaching the pre-COVID peak in January 2021. The snap lockdowns in January, April and June/July 2021 impacted employment but the NTE could see some growth on the June 2020 figures above.

Western Australia

South Australia

Since losing almost 40% of employment in the first month of the pandemic, the state has recovered well, with May 2021 employment reaching approximately 95% of the pre-COVID peak. This has dipped slightly in June 2021 but employment recovery should be expected.

The state experienced 10% decline in NTE employment from 2019-2020. Since then, Accommodation and Food Services has grown faster than the national average, to 90% of the pre-COVID peak, indicating a strong NTE recovery.

Tasmania

Australian Capital Territory

The ACT was the only state to experience any growth in NTE employment over 2020. Figure 4 suggests the NTE may have grown more had it not been for the pandemic. Since July 2020, some growth in Accommodation and Food Services has occurred but in June 2021 employment is at a similar level to June 2020. This suggests that NTE employment figures for the 2020/21 financial year are unlikely to show the strong growth rates experienced during 2019/20.

While the sector experienced the biggest proportional loss in NTE employment (-32%), Figure 4 suggests June 2020 was a low point for Accommodation and Food Services. In June 2021, employment in this sector has surpassed its pre-COVID peak. Growth in NTE employment should be expected.
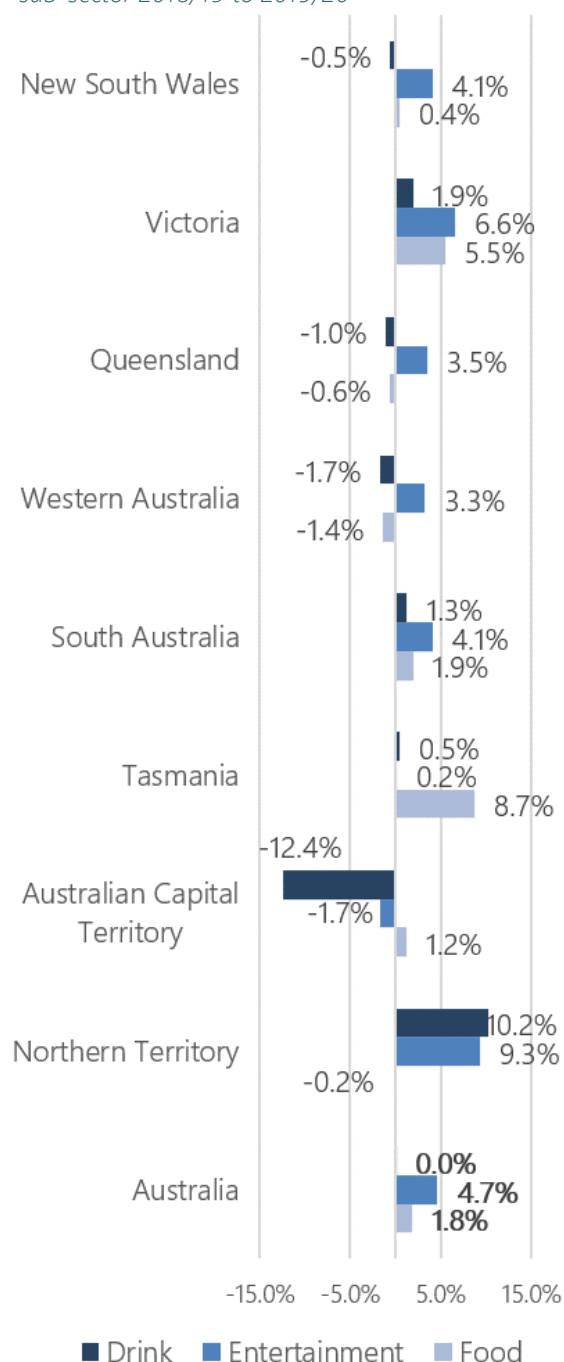
Northern Territory

While Figure 4 provides some encouraging signs in terms of employment, it should be noted that the Accommodation and Food Services sector covers businesses that are not included within the Core NTE. A complete picture of the 2021 impact on the NTE will not be available until 2022 once 2020/21 financial year data is released by the ABS.

2.2. Sub-sectoral performance

There appears to be a shift in balance across the Food (62%), Drink (8%) and Entertainment (30%) sub-sectors, with an increase in the diversity of activities emerging – with less Drink and more Entertainment and Food.

Figure 5: Change in Core NTE establishments, by sub-sector 2018/19 to 2019/20

New South Wales
-0.5%
4.1%
0.4%

Victoria
1.9%
6.6%
5.5%

Queensland
-1.0%
3.5%
-0.6%

Western Australia
-1.7%
3.3%
-1.4%

South Australia
1.3%
4.1%
1.9%

Tasmania
0.5%
0.2%
8.7%

Australian Capital Territory
-12.4%
-1.7%
1.2%

Northern Territory
10.2%
9.3%
-0.2%

Australia
0.0%
4.7%
1.8%

-15.0%   -5.0%   5.0%   15.0%

■ Drink   ■ Entertainment   ■ Food

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

As noted in Section 1.4.2 (p13), the number of Drink establishments did not change between 2018/19 and 2019/20. The trend across the majority of states and territories is that Drink establishments are stagnating or in decline – the key exceptions are the Northern Territory (+10%), Victoria (+1.9%) and South Australia (+1.3%).

These decreases are usually paired with increases in Entertainment and/or Food establishments. The number of Food establishments increased by 1.8% between 2018/19 and 2019/20, driven primarily by increases in Victoria (+5.5%) and Tasmania (+8.7%).

Entertainment has seen establishment growth of 3% or higher (4.7% on average) across every state or territory except Tasmania (0.2%) and the Australian Capital Territory (-1.7%). This strong establishment growth in Entertainment was driven by increases in the Creative and Performing Arts (+4.4% in Australia) and Sports and Physical Recreation (+6.2% in Australia).

These shifts in establishment rates suggests the Core NTE across the majority of states and territories is evolving away from a stereotypical Drink led nightlife to one that is more Entertainment or experience based, suggesting a shift in social behaviours and market demands.

These trends should continue to be monitored to understand whether the rebalancing continues.

Full details of establishments, employment and turnover for each state and territory are provided overleaf (Table 2, Table 3 and Table 4), along with change between 2018/19 and 2019/20 for each key metric.

Table 2: Drink by state/territory in 2019/20 with change from 2018/19 to 2019/20

State/Territory	Establishments		Employment		Turnover ($m)	
	Number	% Change 19-20	Number	% Change 19-20	Number	% Change 19-20
New South Wales	2,894 ⬇	-0.5%	33,830 ⬇	-21.9%	$6,682 ⬇	-3.0%
Victoria	2,478 ⬆	1.9%	23,540 ⬇	-17.3%	$4,655 ⬇	-1.3%
Queensland	1,141 ⬇	-1.0%	21,120 ⬇	-13.1%	$2,750 ⬇	-6.0%
Western Australia	950 ⬇	-1.7%	14,495 ⬇	-15.2%	$2,706 ⬇	-1.5%
South Australia	783 ⬆	1.3%	10,200 ⬇	-17.2%	$1,624 ⬇	-0.5%
Tasmania	223 ⬆	0.5%	3,025 ⬇	-4.9%	$389 ⬇	-8.5%
Australian Capital Territory	99 ⬇	-12.4%	2,105 ⬆	3.7%	$277 ⬇	-3.1%
Northern Territory	54 ⬆	10.2%	1,930 ⬇	-21.4%	$232 ⬇	-11.1%
Australia	8,629 ⬆	0.0%	110,245 ⬇	-17.2%	$19,316 ⬇	-2.8%

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

Table 3: Entertainment by state/territory in 2019/20 with change from 2018/19 to 2019/20

State/Territory	Establishments		Employment		Turnover ($m)	
	Number	% Change 19-20	Number	% Change 19-20	Number	% Change 19-20
New South Wales	12,347 ⬆	4.1%	65,670 ⬇	-32.6%	$13,387 ⬇	-11.5%
Victoria	9,681 ⬆	6.6%	52,725 ⬇	-27.0%	$11,930 ⬇	-8.1%
Queensland	6,256 ⬆	3.5%	37,895 ⬇	-34.3%	$8,563 ⬇	-10.1%
Western Australia	2,921 ⬆	3.3%	17,470 ⬇	-16.7%	$3,547 ⬇	-3.0%
South Australia	1,837 ⬆	4.1%	13,990 ⬇	-8.5%	$2,198 ⬇	-9.3%
Tasmania	598 ⬆	0.2%	3,435 ⬇	-37.4%	$820 ⬇	-11.9%
Australian Capital Territory	472 ⬇	-1.7%	6,120 ⬇	-10.1%	$1,018 ⬆	0.5%
Northern Territory	258 ⬆	9.3%	3,150 ⬇	-47.1%	$815 ⬇	-17.1%
Australia	34,382 ⬆	4.7%	200,450 ⬇	-28.9%	$42,279 ⬇	-9.3%

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

Table 4: Food by state/territory in 2019/20 with change from 2018/19 to 2019/20

State/Territory	Establishments		Employment		Turnover ($m)	
	Number	% Change 19-20	Number	% Change 19-20	Number	% Change 19-20
New South Wales	23,116 ⬆	0.4%	150,460 ⬇	-25.5%	$18,348 ⬇	-11.8%
Victoria	21,394 ⬆	5.5%	155,750 ⬇	-16.6%	$17,608 ⬇	-8.4%
Queensland	12,482 ⬇	-0.6%	119,770 ⬇	-14.8%	$12,871 ⬇	-11.0%
Western Australia	6,405 ⬇	-1.4%	71,235 ⬇	-13.5%	$8,079 ⬇	-4.7%
South Australia	4,143 ⬆	1.9%	41,580 ⬇	-19.0%	$4,762 ⬇	-9.9%
Tasmania	1,468 ⬆	8.7%	15,150 ⬇	-0.8%	$1,414 ⬇	-10.1%
Australian Capital Territory	1,240 ⬆	1.2%	22,825 ⬆	8.6%	$2,057 ⬇	-5.0%
Northern Territory	471 ⬇	-0.2%	7,445 ⬇	-25.3%	$865 ⬇	-15.8%
Australia	70,715 ⬆	1.8%	584,210 ⬇	-17.6%	$66,001 ⬇	-9.6%

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

Prepared by Ingenium Research - August 2021

3. The NTE in Australian cities

While the pandemic's impact to June 2020 varied by state and territory, the same is also true across the cities of Australia. This section of the report explores these trends across each of the fourteen cities that are members of the CCCLM's Local Government Safe Cities Network (LGSCN).

For each LGSCN member city, this section provides a summary of the strategies and measures put in place the council to mitigate the impact of the pandemic on the NTE. This detail is followed by a review of the economic performance of each city's Core NTE.

Comparative NTE performance

While this report focuses on fourteen cities, the wider Ingenium Research analysis covers 88 of Australia's most populous and economically active Local Government Areas (see Table 9 and Table 10, p71). This analysis confirms that Sydney continues to have the highest density of Core NTE establishments in Australia, with over 191 establishment per km^2 and the second largest volume of establishments (5,113 in 2020), with only Brisbane hosting more in 2020 (6,629 establishments).

Table 5: Core NTE establishment comparative performance between the fourteen cities in this report

LGA Name	State	Core NTE establishments				Position based on Core NTE establishments		
		Total	% Change 2019-2020	Per km²	Per 10k population	Count	Per km²	Per 10k population
Brisbane	QLD	6,629	1.6%	5	52	1	10	10
Sydney	NSW	5,113	0.3%	191	206	2	1	2
Gold Coast	QLD	3,399	-0.2%	3	54	3	13	8
Melbourne	VIC	2,767	8.6%	74	151	4	2	4
Canberra	ACT	1,811	-0.4%	1	42	5	14	13
Northern Beaches	NSW	1,519	-1.3%	6	55	6	9	7
Port Phillip	VIC	1,299	4.8%	63	112	7	3	5
Parramatta	NSW	1,295	5.5%	15	50	8	6	12
Newcastle	NSW	875	2.5%	5	52	9	11	9
Adelaide	SA	861	2.3%	55	329	10	4	1
Perth	WA	623	-2.4%	45	201	11	5	3
Hobart	TAS	589	7.3%	8	107	12	7	6
Maroondah	VIC	427	3.4%	7	36	13	8	14
Darwin	NT	418	2.7%	4	51	14	12	11

Sydney's Core NTE establishment growth rate stalled over the last year, increasing +0.3%, while Melbourne experienced a substantial increase (+8.6%), mirroring the pattern observed at the Victorian state level in Section 2 (p15). This, in turn, has increased Melbourne's density to 74 Core NTE establishments per km^2, up from 68 in 2018/19. Port Phillip in Victoria has also shown strong establishment growth over the last year (+4.8%).

After Melbourne, the greatest growth rate in establishments was experienced by Hobart (+7.3%), followed closely by Parramatta (+5.5%). Most of the remaining cities experienced establishment growth in line with the Australian average (+2.5%). The exceptions were Perth (-2.4%), Northern Beaches (-1.3%), Canberra (-0.4%) and the Gold Coast (-0.2%), which all experienced decline.

These trends are explored further in each city's dedicated report section.

Prepared by Ingenium Research - August 2021

People movement

Google Mobility data allows an understanding of pattern changes in visitation to retail and recreation locations. This is a particularly useful indicator in understanding likely future trends in NTE performance by acting as a proxy for consumer confidence in interacting socially. Naturally, a reduction in visitation will have follow on effects to the businesses within these areas. As such, these visitation trends are explored overleaf from February 2020 to June 2021 for each of the fourteen LGSCN cities.

Figure 6 demonstrates the impacts of lockdowns on retail and recreation visitation across each of the cities, while also highlighting the lingering impacts of prolonged lockdowns, particularly within Victoria. For example, Maroondah saw an extended period of reduced visitation from July to November 2020 but had rebounded by May 2021. This was not the case for Port Phillip or Melbourne, where visitation was still 30% lower than the pre-COVID baseline in May 2021. The most recent Victorian lockdown in June has worsened visitation, meaning that NTEs in these areas have likely faced prolonged challenges during the 2020/21 financial year.

Port Phillip and Melbourne are not the only cities with retail and recreation visits substantially below the pre-pandemic baseline – this is also the case for City of Sydney, where visits were still 35% down by 7 June 2021. This is quite different to Sydney's neighbouring LGAs, where trends were more in line with Australia as a whole. Unfortunately, with the exception of Newcastle (which may also be affected), these NSW LGAs are likely to be further impacted as a result of the June/July 2021 lockdowns.

This highlights that, even without restrictions, there is still uncertainty looming over businesses in NSW capital and Victorian cities, with consumer confidence not fully returned. This uncertainty will also be impacting investment and expansion decisions by NTE businesses within these cities.

Other cities across Australia have experienced trends in visitation that are broadly like that of Australia as a whole but they are still below the pre-pandemic baseline. The one exception is Darwin where, following the initial impacts of the pandemic, visitation levels have been higher than the pre-COVID baseline, highlighting its strong performance in suppression of the virus. It is likely, however, that the recent snap lockdowns in late June 2021 will affect this performance.

*Figure 6: Indexed trend in people movement to **retail and recreation** locations for each city (February 2020 to June 2021)*
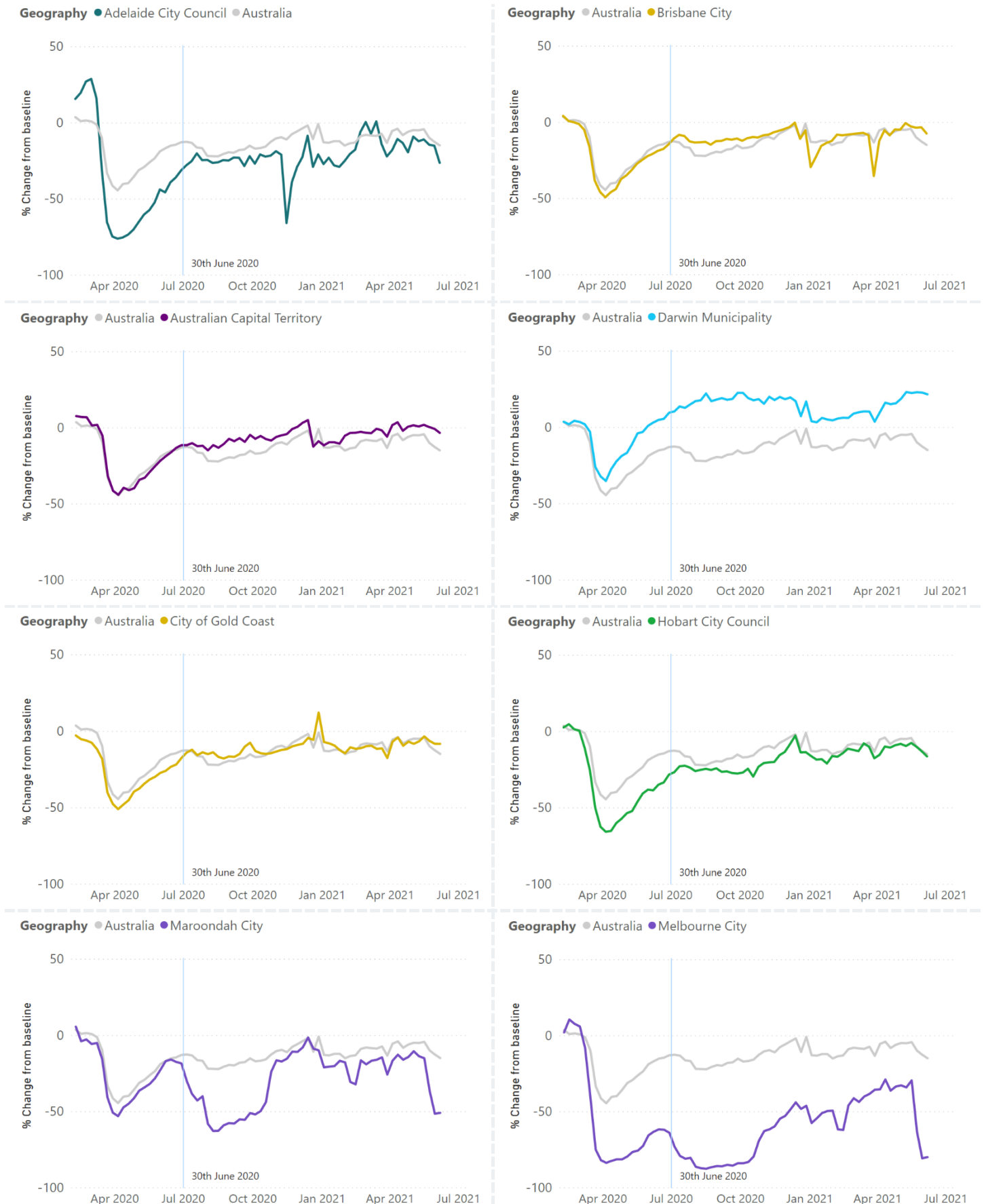
Adelaide

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Australia's most liveable city

A focus on key metrics, trends, and uniqueness

Area profile

South Australia's capital city was ranked the third most liveable city in the world by the Economist Intelligence Unit in 2021, and first most liveable in Australia.

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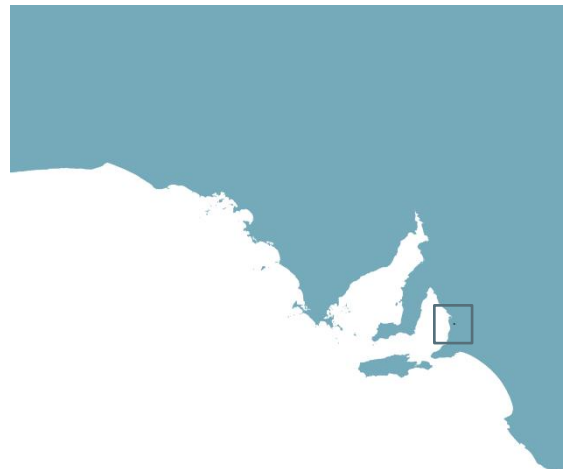
Renowned for its creative culture, Adelaide is a member of the UNESCO Creative Cities network, has been designated as the first and only City of Music in Australia and has been described as Australia's festival city.

The Council's pandemic response

As restrictions eased, the City of Adelaide launched campaigns to encourage people to reconnect with their beautiful city and provided direct benefit to businesses through promotion of their offers.

The City of Adelaide has been supporting city businesses by providing over $11 million in assistance through the creation of grants, activities, activations, financial relief, advice, and assistance programs. All of this despite the City of Adelaide being among those city businesses most significantly impacted by this global pandemic, experiencing a loss in income of approximately $20 million for the 2019-2020 financial year alone.

Examples of support provided include an Outdoor Activation Grant ($1.15m) and the Christmas Incentive Scheme ($223k) which were both oversubscribed with applications. These grants have also benefited the broader City economy, by supporting local tradespeople, manufacturers, artists, performers, and more as the works or activations were carried out. Other initiatives include:

- $100,000 for an extension of the Summer Street Beats and Eats series.
- Implementation of an Event Infrastructure Funding scheme of up to $50,000.
- $1m to assist existing CBD-based events to expand into city-wide events split over 2021/22 and 2022/23.
- An addition of $1m to the Events and Sponsorship Program for new major events in the City in 2021/22 and 2022/23.
- $250,000 to complement and leverage the January 2021 round of the South Australian Tourism Commission's Great State Vouchers, incorporating paid experiences and hospitality offerings.
- $250,000 to design and implement a digital Marketplace for Adelaide businesses within the first quarter of 2021.

Despite the challenges the city has faced during the pandemic, Adelaide remains a city that puts the safety and wellbeing of its community first. The Council has supported its community and residents by providing rates hardship options, introducing contactless parking payment, and supplying groceries to our elderly community members.

Adelaide has always been a progressive, resilient, and creative city, enriched by the diversity of its people. The Council states that *"together, we will continue to overcome challenges and ensure Adelaide remains a city 'Designed for Life'"*.

NTE Performance

Adelaide has the third highest density of both Food (up from fourth place in 2019) and Drink establishments in Australia. This is driven by a large number of Cafes and Restaurants (432) Takeaway Food Services (176) and Pubs, Bars and Taverns (120).

Historically, Food and Drink establishments have formed a high proportion of Adelaide's Core NTE. This is still the case, with 71% of Adelaide's Core NTE businesses belonging to the Food sub-sector (compared 62% nationally) and 15% belonging to the Drink sub-sector (compared 8% nationally). This naturally means that the city's Entertainment sector forms a smaller part of its Core NTE (14% compared to 30% nationally) – with half of these establishments are Creative and Performing Arts.

The city experienced a small increase (+2.3%) in Core NTE establishments between 2019 and 2020. This included 14 additional Takeaway Food Service and 9 extra Creative and Performing Arts businesses.

As with most other geographic areas, the pandemic caused great financial strain on the LGA's NTE, with a loss of -11% in sales turnover and a reduction of -20% in employment as of June 2020. The Food sub-sector experienced the greatest declines in both turnover (-14%) and employment (-23%).

Unlike some other cities in Australia, Adelaide's Entertainment sub-sector was less impacted, with a reduction of -7% and -8% respectively in sales turnover and employment (compared to -9%/-29% respectively across Australia as a whole). This is similar for South Australia, suggesting that the state's pandemic policies enabled these businesses to continue trading more than in some other states.

	Establishments	Employment	Turnover ($m)
Drink	1.5%	-17.8%	-7.9%
Entertainment	7.1%	-8.4%	-7.0%
Food	1.5%	-23.2%	-13.6%
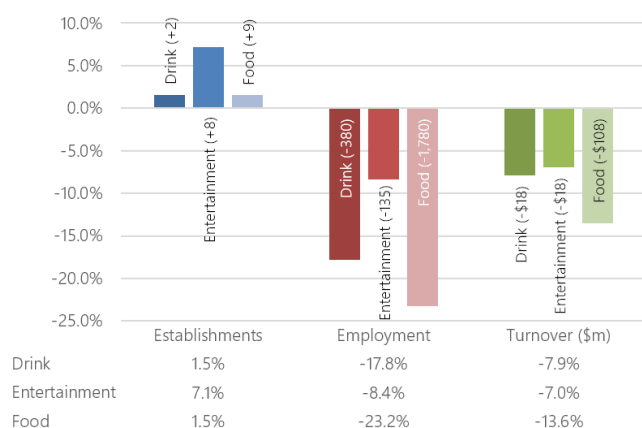
Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	861 +2.3%	5.6%
Employment	9,115 -20.1%	10.7%
Sales Turnover	$1,137m -11.2%	4.1%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	133 +1.5%	15.4%
Entertainment	120 +7.1%	13.9%
Food	608 +1.5%	70.6%

Measure	# 2020 % Change 19-20	Density
Population	26,180 +2.5%	1,681 per km²

Brisbane

Australia's largest NTE

A focus on key metrics, trends, and uniqueness

Area profile

Brisbane is the capital of Queensland, and Australia's third most populous city.

In April 2020, Lord Mayor Adrian Schinner announced a new Community, Arts and Night-time Economy committee chaired by Cr Vicki Howard. The committee will work with the business community to develop the night time economy in key precincts such as Fortitude Valley and the CBD.

The Brisbane Vision 2031 Strategy includes the theme of a *"vibrant, creative city"* and commits to a target of *"a variety of music and night time entertainment precincts"* in the City
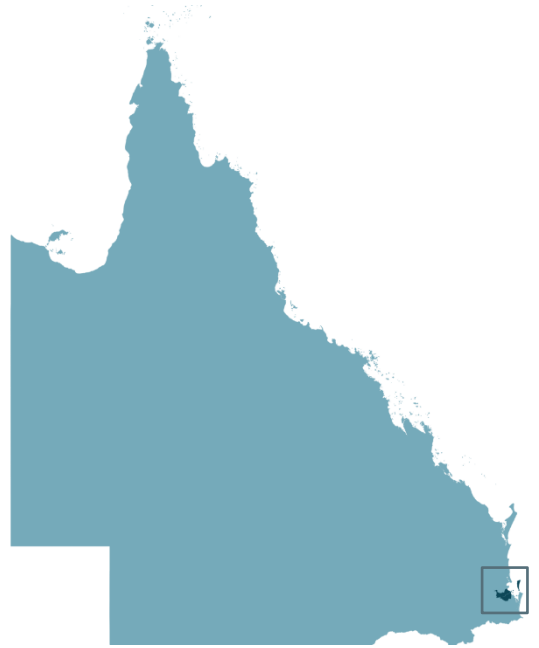
The Council's pandemic response

Brisbane City Council is working with local businesses and industry stakeholders to identify ways it can support its NTE to adapt and become stronger, safer, and more diverse than ever before. The Council is taking action to help rebuild Brisbane's economy by delivering initiatives under its Economic Recovery Taskforce, which was established to boost the city's economy in the wake of coronavirus. *Brisbane's Economic Development Plan* and *Creative Brisbane Creative Economy Strategy* set out aspirations for Brisbane to be regarded as a 'top-ten' lifestyle city. As part of this vision, the Council will continue working with the business community to enhance the NTE in key precincts of the city such as Fortitude Valley and the Brisbane Central Business District.

Brisbane City Council is backing local businesses by easing the financial burden, supporting local jobs and investing in the city's future. This includes direct support for businesses; and a range of initiatives such as making it easier for residents to continue contributing to the NTE, provision of facilities, improvement in safety and investment in events and festivals. Examples include:

- Providing an initial $7.9m business relief package, $4.5m in waived rent and reimbursements for Council lessees and tenants and $3m in direct assistance for community groups on Council land.
- Providing a six-month rates freeze for all ratepayers plus rates rebates for eligible organisations and individuals.
- Supporting events and festivals by honouring payments to cancelled event organisers, reallocating funding from festivals to creative sector support programs, and providing facilities such as City Hall, Riverstage, Brisbane Powerhouse and Parklands. Council supported several events including the Brisbane Festival, BrisAsia Festival, Indigenous Art Program, markets, movies in the park, QUBE effect, Lord Mayor's Seniors Christmas Parties and Christmas Carols. Council also worked with the music industry to deliver events, such as Valley Fiesta and Winter Sounds.
- Promotional campaigns such as *Fun Things to do After Dark* and Brisbane Greeter Twilight Tours attracted people back to the city, while temporarily turning-off parking meters reduced the cost of visits to the city.
- Conducting business forums, professional development, case studies, training programs and videos.
- Streamlining processes, including reducing assessment times for licenses and permits.
- Exploring opportunities to activate the city through the Brisbane City Centre Master Plan 2014 refresh.
- Safety initiatives including Public Space Liaison Officers, Audits, Citysafe Camera Network and creative lighting.

NTE Performance

Brisbane is Australia's largest NTE, with the highest number of Core NTE establishments. The scale of the city geography plays its part in delivering NTE statistics which on the one hand tend to be very high in absolute numbers and yet low in relative density. Its substantial geography stretches over 1,343km². However, within its central postcodes (4000 CBD, 4006 Fortitude Valley and 4101 West End) the NTE is particularly dense, with figures not dissimilar to Sydney, Perth, or Adelaide.

The Core NTE makes an important contribution to Brisbane's labour market, representing almost one in ten jobs in June 2020 (9%) while the equivalent figure nationally is 7%. Brisbane's NTE employment declined by almost 15% to June 2020, which was less than experienced at the state level (-19%) suggesting the initiatives employed by the Council have been somewhat effective in mitigating the pandemic's impact.

	Establishments	Employment	Turnover ($m)
Brisbane	1.6%	-14.5%	-9.1%
QLD	0.7%	-19.6%	-10.1%
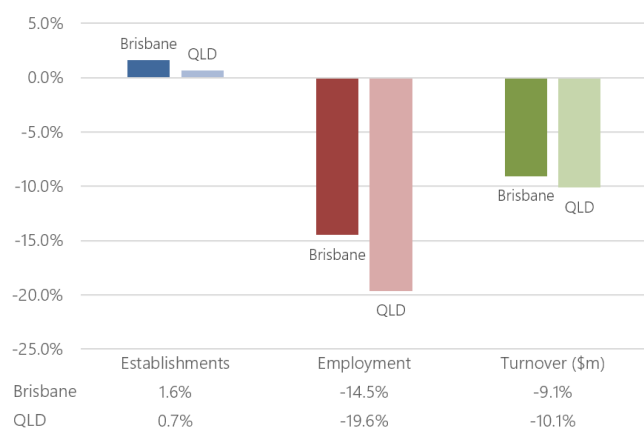
Brisbane's Core NTE is distributed across the Food, Drink and Entertainment sub-sectors in a similar manner to that of Australia as a whole, but with a slightly higher than average Food sub-sector (66% as opposed to 62%) and a smaller Drink sub-sector (5% compared to 8%).

After many years of strong growth in its NTE, the Brisbane LGA experienced a small increase in the number of Core NTE establishments between 2019 and 2020 (+1.6% / +109). This increase was primarily driven by the Entertainment sub-sector, which gained an additional 93 businesses (+5%), with Food seeing a modest increase in establishments (+0.4%) and Drink experiencing decline (-2%). Most of the new Entertainment businesses were in the Creative and Performing Arts (+37) and Sports and Physical Recreation Activities (+37) industries.

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	6,629 +1.6%	4.9%
Employment	60,015 -14.5%	9.0%
Sales Turnover	$7,736m -9.1%	3.6%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	296 -2.3%	4.5%
Entertainment	1,938 +5.0%	29.2%
Food	4,395 +0.4%	66.3%

Measure	# 2020 % Change 19-20	Density
Population	1,273,000 +1.5%	948 per km²

Canberra

The national capital and a growing foodie haven

A focus on key metrics, trends, and uniqueness

Canberra

Area profile

A city within a nature park that forms the Australian Capital Territory, the nation's capital, Canberra, is known for its cultural attractions and thriving food and wine scene. The inner-city corridor of suburbs stretching from Acton and across Civic, Braddon and to Dickson and inner south suburbs such as Kingston house the majority of cafes, restaurants, bars and entertainment venues including theatres and cinemas. Over recent years a proliferation of new residential development along the city corridor and inner south has increased inner city living options with a flow on effect for both hospitality and tourism venues in these areas.

The City's pandemic response

A range of ACT Government advice, supports, rebates and programs are available to Canberra's businesses and community to help with the recovery from the impacts of COVID-19. As of June 2021, this includes but is not limited to the following:

The ACT Event Fund fosters positive economic, community and social outcomes by supporting events that can safely connect the Canberra community and visitors, while the $700,000 *Amp It Up!* Fund assists eligible small to medium live music venues by offsetting costs associated with programming and promotion, providing opportunities for musicians/performance artists.

The Canberra Business Advice and Support Service, delivered by the Canberra Business Enterprise Centre provides up to four hours of free tailored advice, along with development workshops and webinars, to businesses impacted by the pandemic.

The Tourism Cooperative Marketing Fund provides grants to ACT tourism operators and attractions for collaborative marketing projects, while the COVID-Safe Tourism Co-Investment Program supports recovery from the combined effects of bushfires and COVID-19 through grant funding for development of COVID-safe tourism products and infrastructure project.

In addition to the over $10 million provided to the sector in annual arts funding, the ACT Government has committed more than $8 million in economic stimulus to support Canberra's creatives through the COVID-19 pandemic. This includes a series of grants and funding opportunities to assist the ACT's creative arts industry during these difficult times.

A range of licensing/registration fees have been waived, including:
- the food business registration fee (until 31 March 2022)
- the outdoor dining permit fee waiver (until 30 June 2022)
- on and off liquor licensees annual licence fee (until 31 March 2021). The annual licence fee for some liquor licensees has been tapered to provide a 50% fee reduction (until 31 March 2022).
- Liquor licence holders could also choose to move to a general liquor licence, free of charge until 30 June 2021.

A rates rebate of $2,622 will be available for commercial properties with an average unimproved value of $2m or less, while a range of payroll tax waivers, exemptions and deferrals are available to eligible businesses to assist businesses that are unable to operate, or can only operate on a limited basis, due to ACT Government health-related restrictions. Additionally, eligible cafes, restaurants and takeaway businesses could receive a $1,000 rebate on electricity, while eligible hotels/accommodation providers and large function/events venues could also apply to receive a rebate on their fixed water and sewerage charges.

NTE Performance

The Core NTE plays an important role in the ACT's total economy – comprising a higher-than-average proportion of establishments (5.9% vs. 4.7% nationally), sales turnover (5.2% vs. 3.3% nationally) and employment (13% vs. 7.2% nationally.

Between 2019 and 2020, the number of Core NTE establishments experienced a small decrease of 0.4% (-7). There was, however, considerable business churn, with 307 business exits and 288 entries.

While the overall number of Core NTE establishments remained relatively static, sales turnover fell by -3.2%, likely due to the pandemic. Core NTE Employment in the ACT defied this – and the national trend – with more people employed in Core NTE establishments at the end of the 2019-20 financial year than the year prior (+4.0%). This could be a result of the relatively fewer restrictions endured by the ACT compared to other areas.

The majority of the employment increase was driven by the Food sub-sector, with Cafés and Restaurants returning to 2018 levels (increasing +7% on 2019, following a contraction between 2018 and 2019) and Takeaway Food Services gaining an additional 635 employees (+14%). The Food sub-sector also gained the 15 businesses, which will have been a contributing factor in this strong employment performance.

This growth means the Food sub-sector continues to represent a higher proportion of the ACT's Core NTE establishment pool than the national average (69% compared to 62%). This strength in Food businesses is offset by a slightly lower proportion of businesses classified as either Entertainment (26%) or Drink (6%) than Australia as a whole (30% and 8% respectively).

The proportion of Drink establishments has decreased, with the sub-sector experiencing a large fall in establishment numbers (-14) since June 2019, with eleven of these classified as Pubs, Taverns and Bars.

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	1,811 -0.4%	5.9%
Employment	31,050 +4.0%	13.2%
Sales Turnover	$3,352m -3.2%	5.2%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	99 -12.4%	5.5%
Entertainment	472 -1.7%	26.1%
Food	1,240 +1.2%	68.5%

Measure	# 2020 % Change 19-20	Density
Population	431,380 +1.2%	183 per km²

Darwin

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A cultural destination and gateway to South East Asia

A focus on key metrics, trends, and uniqueness

Area profile

A multicultural and modern city, Darwin has been described as Australia's gateway to South East Asia.

The Larrakia people are its traditional owners and form an important part of the city's community and culture.

The Northern Territory's capital city is known for its warm nights, waterfront dining options, cultural festivals, and bustling night markets.
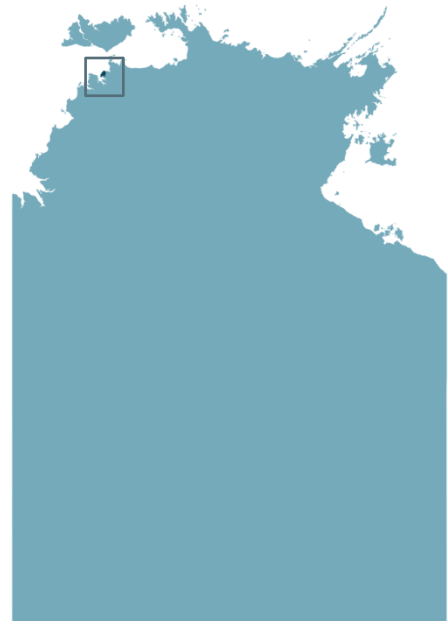
The Council's pandemic response

City of Darwin approved a $55m economic package to support its residential and business community during the pandemic. This package included a range of measures, such as $25m for post-COVID capital works, the deferral of household and business rates, Green Army greening and beautification employment opportunities and the development of the My.Darwin application to support local businesses. An evaluation of this investment found that the City of Darwin's COVID economic stimulus package may have had a contributing effect on maintaining/restoring confidence in the two industries most impacted by COVID restrictions – Accommodation and Food, and Arts and Recreation Services.

The My.Darwin web application supports the local economy by encouraging spending at businesses through discounts, subsidised by the Council. The aim of the initiative is to stimulate increased spending. The program provides $40 in vouchers per day to registered users, which can be used as a 25% discount on purchases. Between June and July 2020 the app gained 32,892 registered users and 380 registered businesses and almost $3.9m was spent at local businesses.

Strategic Direction 4 of the City of Darwin Council's 2019/20 Annual Report – A Smart and Prosperous City – recognises that *"evening activities, alfresco dining, clusters of similar traders and the diversity of price points are amongst the top contributors to this strategic direction"*. Place experience assessments consulted between July 2019 on September 2019 found that things to do in the evening such as shopping dining and entertainment ranked highly in Darwin, as did clusters of small businesses (food cultural traders, fashion etc).

In addition to the above, the Council has worked to improve safety at night through the use of CCCTV smart lighting.

NTE Performance

Darwin was the only Australian capital city to experience a decline in residential population between 2019 and 2020 (-1.2%).

Darwin's Core NTE has a greater focus on Food (67% of the LGA's Core NTE establishments compared to 62% nationally), and less on Drink (7% vs. 8% nationally) and Entertainment, (27% vs. 33% nationally).

The number of Core NTE establishments in Darwin increased by 2.7% (+11 establishments) between 2019 and 2020. Most of this growth was driven by the Drink sub-sector, which gained eight of Pubs, Taverns and Bars and three Liquor Retailing establishments.

Overall, the number of businesses split across industries remained relatively static, with the largest changes including:

- 3 additional Clubs (Hospitality) establishments
- 5 additional Takeaway and Food establishments
- 5 fewer Amusement & Other Recreation establishments.

Despite the small increase in establishments, the pandemic had a substantial financial impact, resulting in a loss of 16% in turnover and almost a third of employment (33%). While this is a significant fall, Weekly Payroll data suggests a strong rebound has since occurred. Similarly, Google mobility data indicates that activity at retail and recreation locations in the city is higher that pre-pandemic baseline.

The greatest percentage fall in employment was in the Entertainment sub-sector (-43%), which lost 715 employees – the majority of whom worked in the Creative and Performing Arts and Gambling Activities industries.

The Food sub-sector also had substantial declines, losing 1,005 employees (-29%). Most of these losses were people employed by Cafes and Restaurants (-755), while the remainder had been employed at Takeaway Food Services (-260).

The pandemic resulted in more than $100m in lost sales turnover between 2019 and 2020 – most of which was from the Food (-$56m) and Entertainment (-$49m) sub-sectors. In Entertainment, Gambling Activities lost -$21.7m, between 2018/19 and 2019/20, while Creative and Performing Arts Activities lost -$18.9m.

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	418 +2.7%	5.7%
Employment	3,735 -32.6%	7.8%
Sales Turnover	$573m -15.5%	3.6%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	28 +64.7%	6.7%
Entertainment	111 -2.6 %	26.6%
Food	279 +1.1%	66.7%

Measure	# 2020 % Change 19-20	Density
Population	82,030 -1.2%	737 per km²

Gold Coast

Queensland's iconic holiday destination

A focus on key metrics, trends, and uniqueness

Area profile

Situated on the eastern coast of Australia, the Gold Coast is a much-loved holiday destination known globally for its long sandy beaches, iconic high-rise city skyline, theme parks and vibrant nightlife.

Surfers Paradise is the Gold Coast's most famous NTE precinct. Its vibrant atmosphere offers a dazzling array of world class nightlife experiences.

In addition to its strong standing in the tourism market, the residential population has increased substantially over the last twenty years, increasing by 63% since 2001 – almost double the national average (32%).
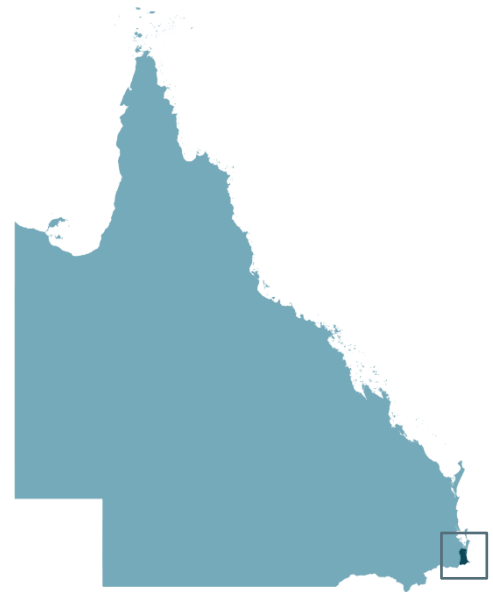
The Council's pandemic response

The City of Gold Coast has established a $26.9 million support package to assist the community and businesses with COVID-19 recovery. The City is currently delivering a suite of projects to support community recovery and build community spirit as part of this package.

In addition, the City supported its key stakeholder, Destination Gold Coast, to administer its $10 million COVID-19 recovery grant from Austrade to eligible businesses.

City activities assisting the NTE COVID-19 recovery include:

- Continued funding to Destination Gold Coast to promote the Gold Coast and attract visitors,
- Working closely with key partners including government agencies and major businesses,
- Delivery of regular business development and investment attraction programs,
- Working with small to medium accommodation providers to look at ways to invest in refurbishment,
- Employment of two City Business Engagement Officers,
- Community safety programs to support residents and reduce anti-social behaviour and crime,
- A safe city survey to obtain data on perceptions of safety before and after the COVID-19 pandemic, to inform late night entertainment precinct programming and safety strategies,
- Initiatives to support community group sustainability with $1.48m in grant funds provided to over 400 local community groups,
- Projects to connect residents to city services and each other,
- Local intelligence gathering to support local led initiatives and build community resilience.

NTE Performance

The Gold Coast's NTE is distributed similarly to Australia across the Food (62%), Drink (5%) and Entertainment (34%) sub-sectors but with a slightly higher reliance on Food and Entertainment and less on Drink establishments.

The number of Core NTE businesses in the LGA fell by -0.2% between 2019 and 2020 – from 3,407 to 3,399. Despite this small decrease, there were some large shifts in the business base across the three sub-sectors of Drink, Entertainment and Food.

The Entertainment sub-sector experienced the greatest gains in establishments, increasing by 39, with 30 of these belonging to the Sports and Physical Recreation industry. The Drink sub-sector gained ten establishments – three Liquor Retail outlets and seven Pubs, Taverns and Bars. The number of Food establishments on the other hand fell by 57, with the loss of 50 Cafes and Restaurants and 7 Takeaway Food Services.

The pandemic had a damaging effect on both Core NTE sales turnover and employment. Sales turnover fell by -14% between 2019 and 2020, while employment decreased by -20%; both greater than the Queensland state average.

The loss of employment was particularly evident in the Entertainment sub-sector, which lost almost a third of jobs (-3,515 jobs / 31%), driven by large losses in Sports and Physical Recreation (-1,555 jobs), Creative and Performing Arts (-855) and Amusement and Recreation (-395).

The losses in turnover were greatest within the Food sub-sector (a loss of -14.5% / -$336m), driven primarily by Cafés and Restaurants (-$253m).

Queensland has seen a relative period of stability in terms of lockdowns and COVID-19 impacts since July 2020, which means the Gold Coast is likely to see a strong recovery by June 2021, with domestic tourism being a key draw for the area.

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	3,399 -0.2%	4.8%
Employment	28,935 -20.0%	9.4%
Sales Turnover	$3,849m -13.6%	3.9%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	161 +6.6%	4.7%
Entertainment	1,143 +3.5%	33.6%
Food	2,095 -2.6%	61.6%

Measure	# 2020 % Change 19-20	Density
Population	635,190 +2.4%	476 per km²

Hobart

Showcasing the very best of Tasmania's culinary produce

A focus on key metrics, trends, and uniqueness

Area profile

A waterfront city with a rich history, Hobart is the capital of Tasmania.

Hobart is a foodie's heaven, showcasing the very best of Tasmania's culinary produce through its renowned dining scene.

The arts are an important part of Hobart's ethos and Hobart's Capital City Strategic Plan 2019-29 asserts that *"Hobart is increasingly being recognised as a creative and cultural capital, hosting a range of events, festivals and creative practitioners"*.

The Council's pandemic response

The City of Hobart Council has responded to economic impacts via its COVID-19 Economic Recovery Framework, which include:

- **Business consultative group:** A group of business people from a range of sectors (primarily retail and hospitality) who come together every ~6 weeks to discuss business needs stemming from the impacts of the pandemic.
- **Safe public spaces:** The City has convened meetings with key stakeholders in the NTE to support them in dealing with community and patron safety, especially in light of physical distancing requirements.
- **Creative sector engagement:** The City has engaged with stakeholders across arts and cultural industries to identify needs and develop ways of working together. The City has continued with its public arts program, for example, through the Hobart Current competition/exhibition and arts projects through the Aboriginal Commitment and Action Plan.
- **Business grants:** A quick response grants program in support of local businesses focused on professional assistance, adapting to the 'new normal', and ecommerce.
- **Hello Hobart:** The City's local business marketing campaign has continued to profile and promote local businesses, especially in retail and hospitality.
- **Block Parties:** In lieu of the annual Christmas Pageant, the City supported retail precincts to host events and bring people together to stimulate business activity at the neighbourhood level.
- **Outdoor dining regulations**: Amendments were implemented to support NTE businesses to meet physical distancing requirements. This included a trial in the Midtown precinct to help increase the space available for outdoor dining, supported by state government funding.
- **Rates, rental, fees, and charges relief:** This supported businesses dealing with financial impacts from the pandemic.
- **Covid impacts economic and demographic analysis:** Research commissioned by the City to look into the immediate, short, medium, and long-term impacts of the pandemic on various sectors of the Hobart economy, including sectors relevant to the NTE.
- **Lowering of speed limits in the city centre:** Helping to make it a safer and more pleasant place for pedestrians.

NTE Performance

The Core NTE is an important part of Hobart's total economy, accounting for 9% of all establishments in the LGA. This is much greater than the Tasmanian (6%) and Australian (5%) averages.

The number of Core NTE establishments in Hobart grew by 7.3% between 2019 and 2020 – a rate only surpassed by Melbourne (+8.6%) – demonstrating a continued demand for NTE services within Hobart. This growth was driven by the Food sub-sector and especially Cafes and Restaurants – which gained an additional 38 businesses. The Food sub-sector is particularly strong in the LGA, comprising 69% of all Core NTE establishments and employees (compared to 62% and 63% respectively nationally).

In terms of business entries (new starts) and exits (permanent closures), the rates were similar to Australia as a whole, although there was a higher proportion of new Food entries (+80), with fewer Food exits (-56).

While Tasmania experienced a 10% drop in employment to June 2020, Hobart fared slightly better – with Core NTE employment decreasing by 6.5%. This is likely driven by a combination of the Council's measures and the strong establishment growth observed over the previous 12 months.

While jobs fared better, the decline in turnover (-10%) was in line with that of the Tasmanian state. Of all the Core NTE sub-sectors, Entertainment was worst hit, losing 365 employees and experiencing a fall in turnover of 14%.

As noted earlier in Section 2 (p15), Tasmania has seen some Accommodation and Food Services employment recovery in the months after June 2020, so these losses should hopefully be recouped by June 2021.

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	589 +7.3%	8.5%
Employment	6,585 -6.5%	13.1%
Sales Turnover	$741m -10.3%	4.9%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	58 +5.5%	9.8%
Entertainment	126 -2.3%	21.4%
Food	405 +11.0%	68.8%

Measure	# 2020 % Change 19-20	Density
Population	55,250 +1.0%	709 per km²

Maroondah

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A growing nightlife hub in Melbourne's east

A focus on key metrics, trends, and uniqueness

Area profile

Situated to the east of Melbourne's CBD, Maroondah is considered the gateway to the Yarra Valley, with key centres in Ringwood and Croydon.

In 2016, Ringwood's Eastland Shopping Centre received a $665m redevelopment and now hosts 60+ dining experiences and a 4.5-star hotel. The transformation of this family orientated destination acted as a catalyst for the regeneration of the area.

A new Liquor Accord was developed in 2020, which enjoys strong membership and vibrant engagement promoting high standards of behaviour in and around licensed premises.

The Council's pandemic response

Following the onset of the COVID-19 pandemic, Maroondah City Council has been supporting businesses, including night time economy (NTE) businesses, through a diverse range of assistance programs delivered directly or in partnership with other organisations. This includes the provision of expert business advice, COVID-19-specific assistance to establish if a business can trade by assisting them in understanding restrictions, developing plans, and delivering access to support services. In addition, there have been several business support initiatives funded by the Victorian Government but administered by Council.

As part of Maroondah COVID-19 Recovery Plan, the following priority actions are being pursued to support business, including NTE businesses:

- Design and digital distribution of health and wellbeing tips for businesses working in isolation - 'Deskercise' videos available online.
- Facilitating the expansion of outdoor dining areas for hospitality businesses (e.g. providing safe and accessible community infrastructure to promote centre activation through enhanced outdoor dining opportunities).
- Business fee relief – for some permits and registrations.
- Shopping centre improvement works.
- Business promotion - 'shop local'.
- Continued engagement and support of Maroondah's shopping centres and representative trader associations.
- Use of Council's BizHub website and its business directory to promote local businesses to other businesses and the community.
- Place Activation Project (parklets, pop up parks) in select activity centres.

NTE Performance

The proportional split of Core Entertainment establishments across the Food, Drink and Entertainment sub-sectors in Maroondah is similar to that of the national average. The LGA has a slightly higher reliance on Food and less on Drink.

Maroondah has continued its Core NTE establishment growth trajectory between 2019 and 2020, with the addition of another 14 businesses to its portfolio. This increase of 3.4% was above the sector's national growth rate (2.5%), but less than the Victorian average (5.5%).

Most of these new businesses were in the Entertainment sector (16), while the Food sub-sector lost three businesses and Drink gained one. Ten of these new entertainment businesses were classified as belonging to the Sports and Physical Recreation Activities industry.

While the Food sub-sector lost three businesses overall, there was considerable business churn, with 46 entries and 61 exits, suggesting that there was also some migration of businesses between the LGA and other areas.

As with nearby Melbourne, the pandemic caused a large drop in both sales turnover (-14%) and employment (-19%) in the LGA's Core NTE in the period June 2019 to June 2020.

The largest actual fall in employment were in the Food sub-sector (-400 employees/-18%), which was driven entirely by Cafés and Restaurants (-385), while Takeaway establishments experienced a minor decline (-2%). The greatest percentage decrease was in Entertainment (-26%), with the Creative and Performing Arts Activities (-105 employees / -26%) and Gambling (-60 employees / -29%) being particularly hard hit.

While metropolitan Melbourne has endured multiple and sustained lockdowns, preliminary data from the ABS Weekly Payroll Jobs and Wages dataset do show some form of recovery at the state level, which should apply to Maroondah.

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	427 +3.4%	4.4%
Employment	2,560 -19.4%	4.8%
Sales Turnover	$330m -13.5%	2.0%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	20 +5.3%	4.7%
Entertainment	126 +14.5%	29.5%
Food	281 -1.1%	65.8%

Measure	# 2020 % Change 19-20	Density
Population	119,400 +0.7%	1,944 per km²

Melbourne

Australia's fastest growing night time economy prior to the pandemic

A focus on key metrics, trends, and uniqueness

Area profile

Victoria's capital city is renowned for its laneways, arcades, coffee culture and extensive arts and cultural scene. The city is also known as Australia's sporting capital, hosting a wide array of key sporting events across the year. Ranked the world's third best student city, in 2019 the city hosted more than 200,000 international students from 170 countries.

In April 2021, the City of Melbourne appointed its first Chairman of the night to lead the Night Time Economy Advisory Committee and investigate opportunities for enhancing activation and participation for all in the central city at night.

The Council's pandemic response

The pandemic has had devastating impacts on Melbourne's businesses and community and the City of Melboure have provided a range of support measures and grants in response to this. The City's COVID-19 Reactivation and Recovery Plan presents seven key initiatives, while the Economic Development Strategy 2031 outlines eight key priorities for the city's future.

One example initiative is the City of Melbourne and the Victorian Government's $8.4 million Melbourne Money dining scheme, which commenced on 11 June 2021. This scheme enables members of the community to claim 20% of their money back when dining in or picking up (takeaway) meals in-store. The scheme applies to a number of venues and will be available until funding is exhausted.

An exciting development for Melbourne's NTE is the newly established Night time Economy Advisory Committee, which brings together leaders from hospitality, retail and creative industries as well as government representatives including experts in city safety and urban planning to focus on challenges facing the Melbourne NTE. The commitment remains to not only ensure the NTE recovers but continues with strong positive growth over the next few years and into the future.

Close to one thousand hospitality businesses across the city participated in the City of Melbourne's extended outdoor dining program. The program provided free permits and extra space to serve customers safely. The Melbourne community has provided feedback recently informing the Council that the program has been a welcome addition to the city.

As part of the City of Melbourne's reactivation and recovery plan, the Flash-Forward Creative Laneways Program secured $7.6m from the Working for Victoria Fund to enhance Melbourne's world-renowned CBD laneways and help the city's economic recovery. To date, the project has employed 164 people, commissioned 40 new music albums, and resulted in 40 new street art murals and 15 lighting installations. This development will stimulate employment in the creative sector; create a new tourism corridor that will transverse the city; improve city safety; promote economic recovery and form an extraordinary network of narratives; both visual and acoustic. It will enhance the social, economic and cultural qualities of the city laneways and collect wayfinding and navigation data to inform an assessment of city renewal.

NTE Performance

In spite of the pandemic, Melbourne continued on the growth trajectory it has been experiencing over the past few years, gaining an additional 220 establishments (+9%) between June 2019 and June 2020, the highest growth rate of all the cities analysed in this report. This growth is likely due to new businesses being established prior to the commencement of the pandemic.

The Food sub-sector had the greatest increase in establishments (+171), with most of these classified as Cafes and Restaurants (+119) and the remainder providing Takeaway Food Services (+52). The Entertainment sub-sector gained +43 establishments, the majority of which (33) belong to the Creative and Performing Arts Activities industry. Additionally, the number of Pubs Bars and Taverns also increased by 6.

Food establishments continue to represent a higher proportion of the city's Core NTE (72%) than in Victoria (64%) or Australia (62%), with this strength in Food offset by a smaller focus on Entertainment establishments (20% compared to 29% in Victoria and 30% across Australia).

While there was establishment growth, these businesses experienced considerable financial loss as a result of the pandemic, with a decline of 9% in turnover and a loss of 15% of jobs by June 2020. The decline in turnover (-9%) was similar across the Food, Drink and Entertainment sub-sectors.

Looking at employment, the Entertainment sub-sector experienced the greatest percentage loss (-21% / - 1,250). Within the Food sub-sector, Cafes and Restaurants also experienced a large loss in employment (-15% - 2,980). These losses are likely due to the lockdown requirements and the inability for many businesses to pivot to socially distanced business models, thereby resulting in shuttered businesses.

While economic data to June 2020 shows establishment growth, Google Mobility data shows that more than a year after the pandemic's commencement, visits to Melbourne's retail and recreation locations in the city remain substantially below the pre-pandemic baseline. This will be creating ongoing challenges for the city's Core NTE businesses and their associated economic performance. As mentioned previously, many initiatives are underway to address these issues.

Key Metrics

Measure	Core NTE 2020 Change 19-20	% Total Economy
Establishments	2,767 +8.6%	6.4%
Employment	27,095 -15.4%	9.0%
Sales Turnover	$3,350m -9.3%	3.6%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	230 +2.7%	8.3%
Entertainment	557 +8.4%	20.1%
Food	1,980 +9.5%	71.6%

Measure	# 2020 % Change 19-20	Density
Population	183,760 +2.7%	4,920 per km²

Newcastle

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A city rich in both character and history

A focus on key metrics, trends, and uniqueness

Area profile

Newcastle has a rich character and history combined with a selection of beautiful beaches. It is situated at the mouth of the River Hunter and is home to the largest coal-mining port in the world.

The Newcastle After Dark strategy highlights the city's burgeoning creative and dining scene through a vison for a *"night-time economy characterised by its creative, vibrant and safe nightlife that contributes significantly to the cultural and economic revitalisation of Newcastle".*
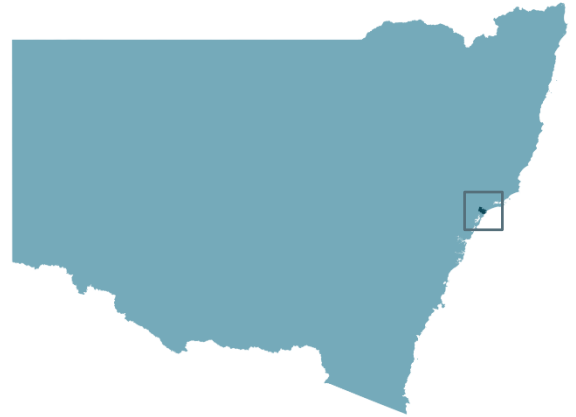
The Council's pandemic response

The City of Newcastle recognised the NTE as an essential aspect of its community and economy was one of the first government organisations in Australia to form a resilience package in response to the pandemic. From an early stage it was clear that the public health orders would be detrimental to the hospitality and live music sectors with impacts on the NTE.

The Community and Economic Resilience Package (CERP) included a wide range of initiatives such as the establishment of a City Taskforce featuring leaders from across the city and led by the City of Newcastle to oversee initial responses and the recovery phases of the pandemic crisis. The City of Newcastle CERP was acknowledged at the NSW Local Government Professionals Excellence Awards in June 2021, taking out the Special Projects Award. One key initiative of the City Taskforce was an affected-industry grants program, with more than $500,000 of city-shaping projects being funded, supporting Newcastle's tourism, entertainment and arts community, these included major grants for projects directly supporting the NTE including:

- University of Newcastle - Hometown Holiday, which incentivised staycations for Newcastle residents.
- Field Frequency - Smart City LIVE Music TV Show - a live-stream series maximising recovery of local arts/entertainment.

The Locally Made and Played grant was also rolled out twice in the 2020/2021 financial year. These grants focused on directly finding artists and incentivising more live music across the city and funded more than 30 local live music venues.

City of Newcastle participated in a Low Impact Venues trial, for 21 licenced premises. This was led by state government, but the Council worked closely with venues to ensure they were able to benefit from reduced restrictions. The trial provided additional opportunities for revenue expansion of the venues which were greatly affected by COVID-19. The evaluation of the trial found an increase in revenue and employment opportunities in the sector, with negligible impact on residential amenity.

In February 2021 City of Newcastle held its inaugural New Annual arts and cultural festival over a two-week period. More than 30,000 people attended events held across the city, with $14m economic impact over the festival period and $5.8m over the remainder of the year. The festival was reported anecdotally as a lifeline for the 500 (primarily local) artists, engaged for the event. It provided a significant marker on the road to recovery for the arts and the night time economy.

NTE Performance

The City of Newcastle Council recognises the NTE as an essential aspect of its economy. This is likely a reflection on the Core NTE accounting for a higher share of Newcastle's total economy than it does at the national level, with 6% of establishments, 11% of employment and 5% of sales turnover (compared to 5%, 7% and 3% respectively across Australia).

Between 2019 and 2020, Newcastle gained an additional 21 (+6.3%) Core NTE establishments. No establishment growth occurred in either Food or Drink establishments, meaning these new additions belong entirely to the Entertainment sub-sector, with 15 of them classified as belonging to Creative and Performing Arts Activities.

While the number of establishments grew, the early consequences of the pandemic can be seen in Newcastle's employment and sales turnover figures, with declines of -15% and -7% respectively between 2019 and 2020. While these are large, they are considerably lower than the trends experienced at the state level, indicating Newcastle has fared better than other NSW cities and suggesting the Council's early interventions greatly assisted the city's Core NTE businesses.

	Establishments	Employment	Turnover ($m)
Newcastle	2.5%	-15.3%	-7.1%
NSW	1.5%	-27.1%	-10.3%
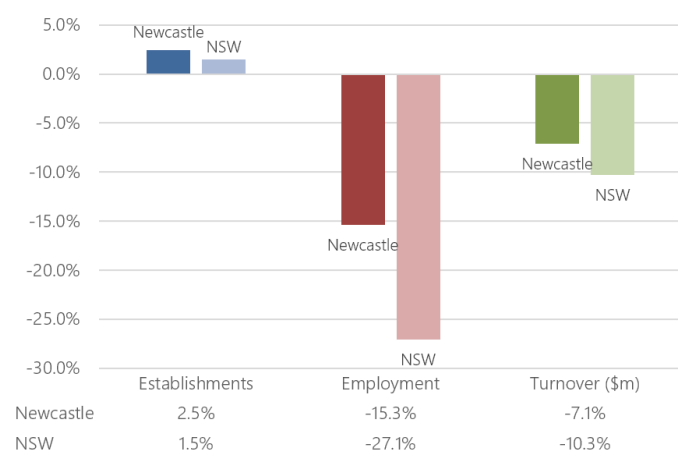
Newcastle's Food sub-sector experienced the greatest decreases in these metrics, with employment falling -25% (-1,920 people) and sales turnover falling -18% (-$146m). Conversely, Newcastle's strong Drink sub-sector – representing 13% of Core NTE establishments compared to 8% nationally – endured the pandemic well, experiencing only a small decline in employment (-2.3%) and some minor growth in sales turnover (+1.1%). The Low Impact Venues trial may have had some impact on these figures.

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	875 +6.1%	6.1%
Employment	11,170 -15.3%	11.2%
Sales Turnover	$1,487m -7.1%	4.6%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	109 0.0%	12.5%
Entertainment	1,269 +8.5%	30.7%
Food	497 0.0%	56.8%

Measure	# 2020 % Change 19-20	Density
Population	167,360 +1.1%	896 per km²

Northern Beaches

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A relaxed beachside community

A focus on key metrics, trends, and uniqueness

Area profile

Situated just north of Sydney, the Northern Beaches coastline stretches from relaxed Manly in the south to the golden sands of Palm Beach in the north.

The Northern Beaches [Local Strategic Planning Statement Towards 2040](#) commits to preparing a night-time economy strategy to *"address safety, late-night transport, noise and light pollution and consider established precincts like Manly, seasonal precincts in the northern end of the peninsula, emerging precincts in areas of transformation such as Dee Why and specialised precincts such as the microbrewery cluster at Brookvale"*.
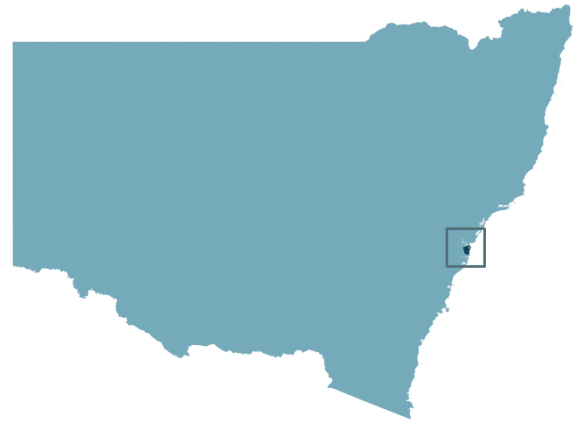
The Council's pandemic response

The Council implemented and promoted a range of support measures for businesses in response to the pandemic, including:

- A new [business support service](#) providing a single point of contact for advice and support.
- A $2m [business support package](#) providing various measures, including waived outdoor dining fees and help for businesses to build social media and digital capaicity.
- [Hardship assistance](#) for businesses affected having difficulties paying rates, annual charges and other fees invoiced by Council. By July 2020, the Council had [waived more than $1.5m in fees](#) to support local businesses.
- A [business to business (B2B) support hub](#), tapping into local knowledge to help businesses adapt to COVID-19.
- A promotional [video campaign](#) to showcase how local businesses pivited operating models to reach new customers.
- Council support for cafes and restaurants establishing [take away services](#).
- A [digital marekting program](#) to support local businesses to adapt and compete effectively.
- A [tourism program](#) delivered with Tourism eSchool, designed to educate, insire and empower local businesses.
- Advocacy and networking opportunities available through the LGA's five local [business chambers](#).
- The New South Wales Government's [Dine and Discover](#), which was fast-tracked to the Northern Beaches. The scheme offers four $25 vouchers for residents aged 18 and over to use at entertainment, recreation and hospitality venues.
- Encouraging people to support local businesses by [shopping locally](#) or by being a [tourist in their own backyard](#) through experiences such as kayaking, beach yoga, stand up paddle boarding, surfing, sailing or boat/bike hire.

In addition to pandemic support measures, the Northern Beaches Council has been progressing a new [Manly Place Plan](#) which aims to *"offer a clear vision and guide future planning in the Manly Strategic Centre"*. A [project working group](#) is being formed, which will provide a forum for discussion between the Council, consultants and key stakeholder groups. The draft plan will be developed over the next six months and be publicly exhibited by early 2022. The Council will also complete a Night Time Economy Study for Manly as part of the process.

NTE Performance

Northern Beaches has a very strong Entertainment sub-sector, accounting for 43% of its 1,500+ Core NTE establishments. This compares to just 30% nationally. The LGA'S Entertainment sub-sector consists of 646 businesses, the majority of which (382) belong to the Creative and Performing Arts industry, followed by Sports and Physical Recreation Activities (173).

In contrast to Entertainment, the LGA's Food sub-sector makes up a smaller proportion of its Core NTE (52%) than the national average (61%). While it is a smaller proportion, this sub-sector consists of 786 establishments – 580 Cafes and Restaurants and 206 Takeaway Food Services.

Between 2019 and 2020, the Northern Beaches lost 20 Core NTE establishments - a drop of -1.3%. This included the loss of 33 Food businesses but an increase of 13 Entertainment businesses (with eight of these belonging to the Sports and Physical Recreation industry).

While overall, the Core NTE lost 20 establishments, there was less churn in terms of business entries and exits than the national average, with 14% of businesses being new starts and 14% of the prior year's businesses closing up (compared to 17% and 16% respectively nationally).

In addition to the fall in business numbers, the Northern Beaches' Core NTE experienced a loss of -13% in sales turnover and a loss of -20% in employment by the end of June 2020. While the turnover decline was greater than that witnessed at the New South Wales level (-10%), employment performance fared much better (-27% in NSW).

The greatest decline was experienced in the Food sub-sector, with a loss of -1,350 jobs (-24%) and -$93.9m in sales turnover (-17%), with most of this loss experienced by Cafes and Restaurants (-1,110 / -$73.1m).

While Entertainment establishments increased, the sub-sector, experienced a 14% decline in employment and 10% drop in sales turnover to June 2020. This employment performance was similar to the Drink sub-sector (-14%) although turnover dropped only -1.6% supported by strong performance in liquor retailing

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	1,519 -1.3%	4.5%
Employment	7,420 -20.1%	5.7%
Sales Turnover	$912m -12.5%	2.2%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	87 0.0%	5.7%
Entertainment	646 +2.1%	42.5%
Food	786 -4.0%	51.7%

Measure	# 2020 % Change 19-20	Density
Population	274,040 +0.2%	1,078 per km²

Parramatta

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The heart of the Central River City

A focus on key metrics, trends, and uniqueness

Parramatta

Area profile

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

In February 2020, Council endorsed the [Parramatta Night City Framework 2020-2024](#), which aims to harness opportunities presented by growth and changing demographics to diversify night time offerings and meet community needs and aspirations.
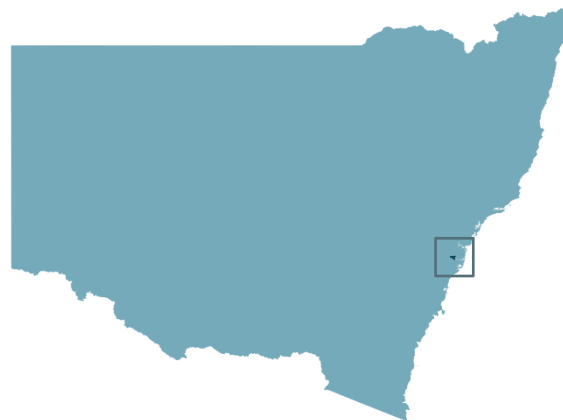
The Council's pandemic response

The Parramatta Night City Framework 2020-2024 has a range of goals and actions for the city's NTE based on six focus areas:

1. Planning for a future 24-hr CBD & late trading centres
2. A night city of diverse business, leisure and culture
3. A night city supported by infrastructure
4. Promoting Parramatta as a thriving night time destination
5. Keeping our city safe and engaging our community
6. Parramatta as a leading night city.

In April 2020, the City of Parramatta announced a $3m [COVID-19 relief package](#) to support businesses and residents. The package included (among others), the waiving of license and hiring fees, small business grants of up to $2,000 (from a pool of $100k) and the relaxation of trading conditions to allow restaurants and other businesses to provide takeaway services. Residents and businesses having difficulty paying their rates could also apply for financial relief under Council's Rates Hardship Policy.

The Council also supported the promotion of local businesses through websites such as [Go-Local: Small Business](#), which encourages residents to "go local" by identifying small businesses, restaurants and cafes for pick-up or take-away by using a list of operating local businesses on the website. The Council also launched an [interactive online map](#) to help people identify trading businesses and associated parking spots.

In February 2021, the City of Parramatta delivered a [Night Time Economy Activation Grants](#) program. This program was aimed at support local businesses, community groups, event organisers and individuals to develop and deliver projects to support the diversity of the NTE in Parramatta. Eligible projects included those related to capital improvements (e.g. art, lighting or acoustic installations), business development (e.g. licensing fees and staffing costs), night time programming (e.g. delivering workshops) and live music programming or licensing costs. The grants, a total of $50k per funding round, were awarded based on two categories: the CBD and surrounds, and Outside of the CBD.

Another initiative was the [Creative Economy Grant](#) program, delivered in September 2020. The program was designed to assist small businesses and cultural/social enterprises to recover from the impact of the pandemic by innovating and adapting to the emerging new circumstances. A total of $150k has been allocated to this program.

NTE Performance

Paramatta's Core NTE establishment base grew by 5.5% between 2019 and 2020, greater than nearby Sydney (+0.3%), wider NSW (+1.5%) and Australia as a whole (+2.5%).

A key driver of this establishment growth is Parramatta's strong Food sub-sector, which makes up 77% of its establishments, 68% of employment and 49% of sales turnover. This sub-sector gained an additional 39 establishments (+4.1%) between 2019 and 2020, with 22 additional Cafes and Restaurants and 17 Takeaway Food Services, bringing the total number of establishments in this sub-sector to exactly 1,000.

Despite this sub-sector's growth, considerable business churn was experienced in the 2019-20 financial year, with 240 entries (a rate of 24%) and 191 exits (a rate of 20%). Entry and exit rates were higher than the national average (19% for both entries and exits), suggesting volatility in the local market.

While the Food sub-sector helped Parramatta gain additional establishments, the pandemic's impact caused a fall in Core NTE turnover of -11% and a -19% reduction in Core NTE employment. Food was particularly impacted with a loss of -$71m (-13%) in turnover and -1,095 employees (-19%).

The LGA's Entertainment sub-sector is small relative to its Food sub-sector, accounting for just 20% of Core NTE establishments (compared to 30% nationally) but experienced similar declines in employment (-19%) and turnover (-12%). This sub-sector, however, did gain an additional 28 establishments between 2019 and 2020 (+12%). Most of these businesses are classified as Sports and Physical Recreation (12) or Creative and Performing Arts (9) industries with these two industries accounting for 194 of Parramatta's 256 Entertainment establishments.

The Drink sub-sector makes up just 3% (39 establishments) of Paramatta's Core NTE – compared to 8% across Australia as a whole. In 2020, the sub-sector has remained relatively static with 22 businesses classified as Liquor Retailing (increasing by 3 since 2019) and a further 17 Pubs, Bar or Taverns (decreasing by 2 since 2019).

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	1,295 +5.5%	4.5%
Employment	6,810 -18.9%	6.2%
Sales Turnover	$1,032m -11.3%	2.9%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	39 +2.6%	3.0%
Entertainment	256 +12.3%	19.8%
Food	1,000 +4.1%	77.2%

Measure	# 2020 % Change 19-20	Density
Population	260,300 +1.2%	3,105 per km²

Prepared by Ingenium Research - August 2021

Perth

———————

Boasting an extensive array of night time options and high population growth

A focus on key metrics, trends, and uniqueness

Area profile

In 2021, Perth was ranked the sixth most liveable city in the world by Economist Intelligence Unit and second most liveable city in Australia.

Australia's most isolated capital city boasts an extensive array of bars, restaurants, and shopping opportunities.

When combined with its white sandy beaches, beautiful parklands, and the Swan Valley wineries on its doorstep, Perth offers a thriving city to both residents and visitors alike.
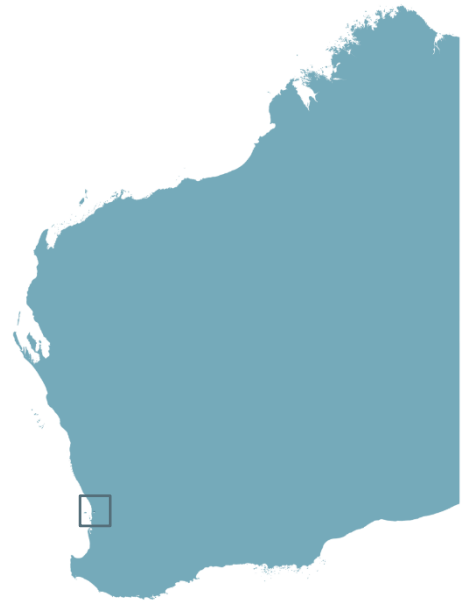
The Council's pandemic response

Prior to the onset of the Covid-19 pandemic, the City of Perth Council had commenced a range of initiatives that support NTE establishments, including free parking trials and a fee-free simplified outdoor dining application process.

The Council has also been progressing the proposed planning amendments for the Northbridge Special Entertainment Precinct initiated in December 2019. The intent of the amendment is to create a special noise control area to help businesses (particularly entertainment venue operators) against the potential impacts of noise complaints.

The Council's COVID19 Economic Rebound Strategy aims to improve community outcomes, ease the strain on businesses, reduce red tape and return a strong economic performance. The Strategy budgeted nearly $18m for a range of initiatives, including small business grants, business improvement grants, fee waivers, activations and events and the East End Revitalisation Program.

A range of support measures have continued for businesses in the 2020/21 financial year, including improved customer service for businesses, consultation/mentoring opportunities, a program of workshops and further small business grants and business improvement grants. In addition to this, 2021/22 Council rates have been frozen to their 2020/21 levels.

In May 2021, the Council approved its new 2025 Events Strategy. It is anticipated that the new strategy will result in an investment of $5.4m that will focus on bringing life to the retail core and entertainment precincts to support local businesses. Major public events planned include the Christmas Lights Trail ($1.5m), New Year's Eve ($500,000) and Australia Day Skyworks ($2.3m).

Council has endorsed the 2021/22 sponsorship program (budgeted at over $5m) to support projects and initiatives that will improve public places, attract and facilitate signature events in the city that attract visitation, support neighbourhoods and community wellbeing, assist small businesses that provide direct benefits to the City community. This includes major events and festivals, event activations, arts and economic development grants, among others.

NTE Performance

Perth experienced a much larger increase in its residential population between 2019 and 2020 (+7.1%) than any other Australian capital city (the second highest was Melbourne with +2.7%). This growth has not yet reflected in Core NTE metrics, with Perth being one of the few cities that recorded a decline in NTE establishments.

Between 2019 and 2020, Perth lost 15 Core NTE businesses (-2.4%). Eight of these belonged to the Food sub-sector, six were Drink and one was Entertainment.

The city's Core NTE is more reliant on its Drink sub-sector than elsewhere in Australia. The sub-sector makes up 17% of its establishments, 23% of employment and 22% of sales turnover, compared to national figures of 8%, 12% and 14%. In 2020, the city had 13 Liquor Retailing outlets and 94 Pubs, Bars and Taverns. This strength in Drink outlets is in contrast to Entertainment establishments, which account for just 13% of Perth's Core NTE base (30% is the national equivalent figure).

While establishment losses reflect pre-pandemic trends, the pandemic itself had a harsh impact on the Core NTE's employment, with -17% (-1,735) of jobs lost as of the end of June 2020 – greater than the WA average (-14%). Many of these jobs were lost from the Food sub-sector (-1,150) and more specifically, in Cafes and Restaurants (-925).

Sales turnover was also impacted, with the pandemic reducing revenues by $67m on the previous year, a fall of -6%. As with employment, the greatest losses were in Food (-$40m).

There were a few Core NTE industries in Perth which had small increases in establishment numbers. These include Sports and Physical Recreation Activities (+5), Clubs (Hospitality) (+4) and Takeaway Food services (+1).

There was higher than average business entry and exit activity in Perth's Core NTE – an entry and exit rate of 18% businesses (15% in Western Australia). This equated to 112 entries and 118 exits, with the highest volatility in the Food sub-sector.

Western Australia saw strong recovery in the accommodation and food sector, prior to the lockdowns earlier in 2021, suggesting that Perth should be in a good position come June 2021, so long as establishments remain stable.

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	623 -2.4%	5.0%
Employment	8,280 -17.3%	7.2%
Sales Turnover	$1,046m -6.0%	2.7%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	107 -5.3%	17.2%
Entertainment	80 -1.2%	12.8%
Food	436 -1.8%	70.0%

Measure	# 2020 % Change 19-20	Density
Population	30,970 +7.1%	2,258 per km²

Port Phillip

A high density residential area with strong arts and cultural scenes

A focus on key metrics, trends, and uniqueness

Area profile

Hosting a range of events including St Kilda Festival (Australia's largest free music festival), St Kilda Film Festival and Yaluk-ut Weelam Ngargee, Port Phillip has a vibrant music and cultural scene that is home to a diverse range of artists and creative industries.

A popular seaside tourist destination, the area is also home to Luna Park, boasts world class restaurants, popular cafes, and hosts the annual Formula One Australian Grand Prix.

In addition to its arts and culture, the area hosts the Fishermans Bend precinct – Australia's largest urban renewal project.

The Council's pandemic response

As part of the City of Port Phillip Council's COVID-19 recovery program, the Business Parklets initiative involved the re-purposing of parking bays, footpaths and open spaces outside or near businesses, to support traders in creating fun alfresco dining options. A total of 64 businesses joined this program to extend their outdoor trading areas for residents and visitors across the municipality. These included beach bars, partial and full road closures for dining extensions, park dining spaces as well as the traditional parklets using parking bays. Business Parklet recipients and footpath trading businesses were also offered complimentary weatherproofing assets to keep, including gas heaters for the winter months, umbrellas, and festoon lighting for safety and decoration.

The Port Phillip Council Love My Place grant program enabled businesses and community groups to reactivate public space through unique projects ranging from events, music projects, art installations or activations, lighting, seating, amenity, games and community social gatherings to enhance connections. Five of the successful grantees have or will be delivering night-time activations in key activity centres.

The Council's Public Space Activation program this year has focused on creating activations that aim to attract people back to the LGA's key business activity centres, and once again some of these were night time activations including the Glen Eira Road night-time NEON lighting installation (planned for June 2021) in Burnett Grey Gardens and along the high street, and the St Kilda lighting installation (planned for June/July 2021).

The Council has held several live music performances to help improve the atmosphere of key public spaces around activity centres as part of its Live Music Action Plan.

The Council also delivered marketing campaigns such as the Stay and Play initiative attracting regional visitors to stay and the Dessert First initiative designed to increase visitation to shopping and entertainment precincts over winter.

NTE Performance

The Core NTE plays an important role in Port Phillip's total economy, contributing 6%, 10% and 4% to establishments, employment and sales turnover respectively (compared to 5%, 7% and 3% nationally).

Port Phillip's Core NTE has a much greater reliance on Entertainment establishments, which make up 38% (499) of its business base (compared to 30%) nationally. Most of these businesses belong to the Creative and Performing Arts (320) and Sports and Physical Recreation (120) industries, reflecting the cultural strengths of the area.

The LGA also has a slightly stronger Drink sub-sector than average (9% of businesses compared to 8% nationally), resulting in the Food sub-sector making up just 53% of the Core NTE businesses.

Following a period of Core NTE establishment decline between 2016/17 and 2018/19, the LGA gained 60 additional Core NTE businesses over the course of 2019/20, distributed across its Food (+30), Entertainment (+27) and Drink (+3) sub-sectors. The Cafes and Restaurants industry experienced the largest gain, with 36 additional businesses (Takeaway Food Services fell by -6).

While these gains are positive, the pandemic impact took its toll on the Core NTE's employment and sales turnover with losses of -18% and -11% as at the end of June 2020. Employment fared better than the trends experienced at the state level, while turnover performed slightly worse.

	Establishments	Employment	Turnover ($m)
Port Phillip	4.8%	-17.8%	-11.3%
VIC	5.5%	-19.3%	-7.4%
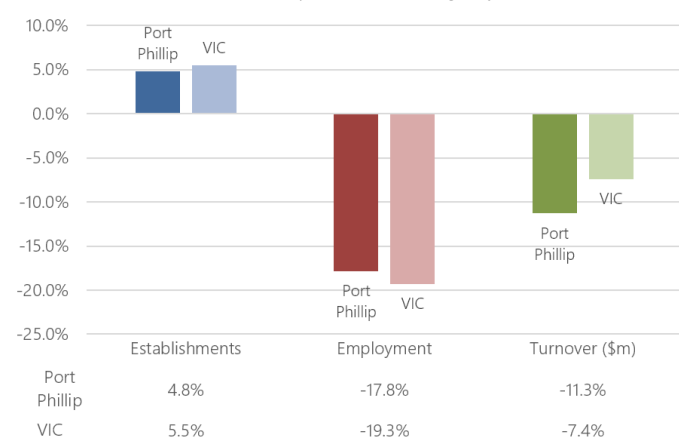
In terms of employment, the Entertainment sub-sector experienced the greatest percentage loss (-25% / -960 jobs), while Food had the greatest total loss (-16% / -1,235).

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	1,299 +4.8%	5.9%
Employment	10,735 -17.8%	9.6%
Sales Turnover	$1,437m -11.3%	4.3%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	111 +2.8%	8.5%
Entertainment	499 +5.7%	38.4%
Food	689 +4.6%	53.0%

Measure	# 2020 % Change 19-20	Density
Population	116,480 +0.7%	5,624 per km²

Sydney

Australia's densest night time economy destination

A focus on key metrics, trends, and uniqueness

Area profile

Australia's Harbour City has one of the strongest Night Time Economies in Australia, boasting the highest density of establishments per km^2.

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

In late 2020, the NSW Government launched its first 24-Hour Economy Strategy, with a vision to transform Greater Sydney into a 24-hour economy centre that is vibrant, diverse, inclusive, and safe.
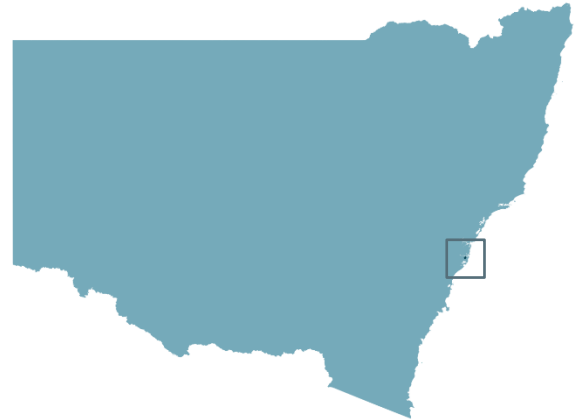
The Council's pandemic response

The NSW Government partnered with the City for a $20m CBD focused revitalisation over summer 2020/21 to support business and public space activation and bring people back to the city. This included:

- Sunset Piazza: 32 nights of outdoor live performances in Cathedral Square in March/April 2021. 15,000 tickets sold, supporting 450 artists and creative practitioners.
- The Alfresco Outdoor Dining Program: This commenced in December 2020 and, as of 31 May 2021, the City had approved 206 applications to reallocate footpaths (139) and roads (67) for outdoor dining. In a March 2021 survey of the program's business participants, 90% reported the program was beneficial or crucial to their business, 45% had employed an additional two or more staff per week and 58% had experienced an increase in turnover.

The City has provided close to $8m in grant funding to nightlife businesses and creative enterprises since March 2019 including:

- 395 COVID-19 Small Business grants valued at close to $4m to support business adaptation and digitisation.
- 35 Cultural Sector Innovation grants valued at over $500,000 to support small to medium cultural creative organisations to pilot new operational models and innovative projects.
- 49 Night-Time Diversification and Live Music and Performance business grants valued at over $480,000.
- 96 CBD Activation grants valued at $3m to support business to program activities that attract people into the city. An example of this funding was to establish the YCK Laneways Precinct and a program of live entertainment across six weeks, culminating in the YCK Laneways Block Party. This precinct will continue to thrive as it develops its identity and brand value.

In addition to the above support, between April 2020 and March 2021, the City of Sydney Council waived close to:

- $4m in business fees and charges for outdoor dining, public space hire and venue hire cancellation fees.
- $600,000 in rent relief for creative spaces, short term vacant property, creative accommodation, and live/work tenancies.

NTE Performance

The Core NTE is an important part of Sydney's economy, representing 10% of all establishments in the city (the equivalent figure for both New South Wales and Australia is 5% of all establishments).

The Sydney LGA has both the highest residential density and Core NTE establishment density in Australia. This is also true for the city's Food and Drink sub-sectors. However, Sydney loses out to neighbouring Waverly Council for having the highest density of Entertainment establishments in Australia.

Food (70%) and Drink (12%) continue to represent a higher proportion of the city's Core NTE than in Australia (62% and 8%). The counterbalance to this strength in Food and Drink is a smaller percentage of Entertainment establishments (18% compared to 30% across Australia). Since entertainment venues tend to be larger in capacity and smaller in numbers this may contribute to high NTE density performance.

While Sydney has the strongest Core NTE in Australia, its growth trajectory stalled between June 2019 and June 2020, gaining just 17 new establishments overall representing an increase of 0.3% – well below the NSW average (+1.5%). The only sub-sector to experience establishment growth in this period was Food (+0.8%). This was driven by Cafés and Restaurants (+2.3%) with Takeaways declining (-4.5%).

In addition to the stagnation in establishments, the pandemic had a considerable financial impact on the city's Core NTE, with a drop of 14% in turnover and a loss of almost a quarter of employment in the sector (-24%) from June 2019 to June 2020. The Entertainment sub-sector was the hardest hit in terms of employment – declining over 30% – while the Food sub-sector saw the greatest decline in turnover (-16%).

While these are large declines, it should be noted that they reflect the early months of the pandemic, prior to the implementation of the many approaches implemented by the Council and NSW Government. ABS Weekly Payroll data suggests that a strong rebound in all-industries employment has since occurred, with Sydney returning to pre-pandemic employment levels by October 2020. The latest (June/July 2021) lockdowns, however, are likely to result in a recurrence of falls in employment levels.

Key Metrics

Measure	# Core NTE 2020 % Change 19-20	% Total Economy
Establishments	5,113 +0.3%	10.2%
Employment	27,315 -24.4%	6.0%
Sales Turnover	$3,880m -14.3%	3.4%

Sub-sector	# Establishments % Change 19-20	% Core NTE
Drink	606 -0.3%	11.9%
Entertainment	920 -1.0%	18.0%
Food	3,587 +0.8%	70.2%

Measure	# 2020 % Change 19-20	Density
Population	248,740 +1.1%	9,301 per km²

4. Appendix

4.1. Data sources

4.1.1. Economic performance

Economic 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 2016 to June 2020 dataset[i]. Through a collaborative approach with the ABS, the bespoke request covered a selection of key ANZSICs (set out in Section 4.2, along with the limitations of this approach) for a total of 88 of the most populous and economically active LGAs in Australia. This dataset was analysed and modelled using additional ABS datasets including labour force data[ii] and industry sales and service income[iii] data (sales turnover).

In some cases, ANZSIC level data can be provided, 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[iv] techniques when dealing with smaller numbers to maintain confidentiality of businesses in the dataset.

Important points to note and limitations of the CABEE dataset

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

Most establishments are counted as a single unit, at the location of their registered address, or at the address with the highest employment. Establishments operating from multiple locations (for example large cinema chains) may only be counted once. Conversely, establishments with legal structures that have led to the registration of 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.

All employment and turnover estimates refer to the total employment and sales turnover in each specified ANZSIC or sub-sector, and as a result includes both day and night time activity. Ingenium Research is currently exploring opportunities to determine the temporal split of sales turnover and employment for future research.

4.1.2. Other data sources

In addition to the sources outlined above, the report utilises employment trend data from the ABS Weekly Payroll Jobs and Wages dataset to understand the immediate impact of the pandemic to the end of the 2019/20 financial year and the proceeding eleven months to June 2021. Additional data sources are outlined throughout the text of this report, with references provided as endnotes in Section 4.4 (p73).

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[i] ABS Catalogue 8165.0 - Counts of Australian Businesses, including Entries and Exits, Jun 2016 to Jun 2020
[ii] ABS Catalogue 6202.0 - Labour Force
[iii] ABS Catalogue 8155.0 – Australian Industry
[iv] The ABS Catalogue 8165.0 (link at footnote i) 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)

4.2. NTE definition

As noted in the Glossary of Terms, 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 definition of the NTE was developed by TBR Ltd and MAKE Associates, through granular analysis of Dun & Bradstreet business data in 2008/9. This definition was adapted from UK Standard Industrial Classifications (SICs) to Australian ANZSICs for the City of Sydney's 2011 Cost Benefit Analysis Study, and has been employed in the annual NTE research for CCCLM member cities ever since.

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

Important points to note and limitations of the NTE definition

The ANZSIC codes used to define Core, Non-Core and Supply are provided below. It should be noted that temporal breakdown of economic activity is not recorded in official data sources. Therefore, while ANZSICs have been selected based on businesses with a propensity to operate at night, establishment counts may include businesses that operate solely during, or for part of, the day. As such, employment and sales turnover figures may also include daytime activity – which may mask the full impact of COVID-19 on the night.

Table 6: Core NTE ANZSIC definition

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

[v] It should be noted that each state and territory has its own liquor licensing regulations/laws. As such, liquor retailing activity may be more likely to occur during the night in some states and territories than in others.
[vi] 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.
[vii] ANZSIC 911 (Sports and Physical Recreation Activities) includes ANZSIC 9114 (Sports and Physical Recreation Administrative Service) and so could potentially over estimate night time related activity within this industry. ANZSIC 9114 accounts for 5% of establishments within ANZSIC 911, although associated sales and employment may be higher.
[viii] ANZSIC 920 (Gambling Activities) includes ANZSIC 9209 (Other Gambling Activities), which captures internet gambling operation and TAB operation, that may occur during the day.

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Table 7: Non-Core NTE ANZSIC definition

NTE Sub-Sector	ANZSIC	Description
Care	771	Public Order and Safety Services
	840	Hospitals
Arts Education	8212	Arts Education
Libraries & archives	601	Libraries and Archives
Design	692	Architectural, Engineering and Technical Services
Food	411	Supermarket and Grocery Stores
	4121	Fresh Meat, Fish & Poultry Retailing
	4122	Fruit & Vegetable Retailing
	4129	Other Specialised Food Retailing
Accommodation	4400	Accommodation
Infrastructure	29	Waste Collection, Treatment and Disposal Services
	751	Central Government Administration
	753	Local Government Administration
	772	Regulatory Services
	9531	Laundry and Dry-Cleaning Services
Other Education	8219	Adult, Community and Other Education 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 8: Supply NTE ANZSIC definition

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

4.3. Core NTE LGA rankings

Table 9: Core NTE Establishments in 2019/20 with density and % change from 2018/19 – part 1

Position	LGA Name	State	Establishments	Density Per km²	% Change 19-20
1	City of Sydney	NSW	5,113	191.5	0.3%
2	Waverley Council	NSW	755	80.3	8.5%
3	Yarra City Council	VIC	1,475	75.6	4.4%
4	City of Melbourne	VIC	2,767	74.0	8.6%
5	North Sydney Council	NSW	715	68.1	0.7%
6	Port Phillip City Council	VIC	1,299	62.8	4.8%
7	City of Adelaide	SA	861	55.2	2.3%
8	Inner West Council	NSW	1,614	45.6	0.7%
9	City of Perth	WA	623	45.5	-2.4%
10	Woollahra Municipal Council	NSW	505	41.1	4.8%
11	Burwood Council	NSW	288	40.6	-0.3%
12	City of Stonnington	VIC	1,042	40.5	0.7%
13	City of Canada Bay Council	NSW	617	31.0	-5.2%
14	Willoughby Council	NSW	637	28.4	1.9%
15	Glen Eira City Council	VIC	898	23.2	3.0%
16	Randwick City Council	NSW	829	22.8	1.2%
17	City of Boroondara	VIC	1,327	22.0	6.3%
18	Georges River Council	NSW	797	20.8	1.9%
19	Moreland City Council	VIC	1,042	20.4	11.1%
20	Maribyrnong City Council	VIC	612	19.6	1.0%
21	City of Darebin	VIC	972	18.2	8.7%
22	Bayside City Council	VIC	670	18.0	4.2%
23	City of Ryde	NSW	715	17.7	6.1%
24	Bayside Council	NSW	857	17.2	0.4%
25	Moonee Valley City Council	VIC	718	16.7	5.4%
26	City of Whitehorse	VIC	1,009	15.7	6.8%
27	City of Monash	VIC	1,268	15.6	7.0%
28	City of Parramatta	NSW	1,295	15.5	5.5%
29	Cumberland Council	NSW	993	13.9	3.8%
30	City of Canterbury Bankstown	NSW	1,499	13.6	0.9%
31	Kingston City Council	VIC	856	9.4	4.4%
32	City of Charles Sturt	SA	492	9.0	-2.8%
33	City of Stirling	WA	928	8.9	-0.1%
34	Banyule City Council	VIC	543	8.7	7.5%
35	City of Burnside	SA	232	8.4	5.0%
36	City of Hobart	TAS	589	7.6	7.3%
37	Fairfield City Council	NSW	741	7.3	6.2%
38	Manningham City Council	VIC	815	7.2	5.0%
39	Maroondah City Council	VIC	427	7.0	3.4%
40	Hobsons Bay City Council	VIC	444	6.9	7.2%
41	Ku-ring-gai Council	NSW	562	6.6	3.3%
42	City of Greater Dandenong	VIC	776	6.0	6.7%
43	Northern Beaches Council	NSW	1,519	6.0	-1.3%
44	City of Brimbank	VIC	727	5.9	6.0%

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Table 10: Core NTE Establishments in 2019/20 with density and % change from 2018/19 – part 2

Position	LGA Name	State	Establishments		Density Per km²		% Change 19-20
45	Knox City Council	VIC	665		5.8		3.9%
46	City of Joondalup	WA	523		5.3		0.4%
47	Brisbane City Council	QLD	6,629		4.9		1.6%
48	City of Newcastle	NSW	875		4.7		2.5%
49	City of Blacktown	NSW	1,021		4.3		3.9%
50	City of Darwin	NT	418		3.8		2.7%
51	City of Frankston	VIC	441		3.4		0.9%
52	City of Mitcham	SA	250		3.3		8.7%
53	Sutherland Shire Council	NSW	1,030		3.1		3.5%
54	City of Casey	VIC	1,081		2.6		10.3%
55	City of Gold Coast	QLD	3,399		2.5		-0.2%
56	The Hills Shire Council	NSW	885		2.3		4.9%
57	Liverpool City Council	NSW	682		2.2		3.8%
58	Wyndham City	VIC	1,013		1.9		20.0%
59	Hume City Council	VIC	735		1.5		7.5%
60	City of Whittlesea	VIC	714		1.5		1.1%
61	Penrith City Council	NSW	576		1.4		2.1%
62	Campbelltown City Council	NSW	398		1.3		-3.6%
63	Hornsby Shire Council	NSW	568		1.2		0.4%
64	Wollongong City Council	NSW	850		1.2		2.5%
65	Mornington Peninsula Shire	VIC	819		1.1		1.7%
66	Lake Macquarie City Council	NSW	612		0.9		2.9%
67	City of Greater Geelong	VIC	1,050		0.8		3.9%
68	Melton City Council	VIC	434		0.8		2.1%
69	Central Coast Council	NSW	1,316		0.8		1.2%
70	City of Ballarat	VIC	523		0.7		11.0%
71	Albury City Council	NSW	210		0.7		7.1%
72	Nillumbik Shire Council	VIC	288		0.7		5.1%
73	Byron Shire	NSW	368		0.7		-4.9%
74	Sunshine Coast Council	QLD	1,457		0.6		3.9%
75	Maitland City Council	NSW	230		0.6		-5.7%
76	Moreton Bay Regional Council	QLD	1,123		0.6		0.1%
77	Cairns Regional Council	QLD	739		0.4		-3.3%
78	Port Stephens Council	NSW	235		0.3		0.9%
79	City of Wodonga	VIC	112		0.3		-11.1%
80	City of Launceston	TAS	349		0.2		4.2%
81	Townsville City Council	QLD	596		0.2		3.7%
82	City of Greater Bendigo	VIC	429		0.1		6.5%
83	Hawkesbury City Council	NSW	282		0.1		-4.7%
84	Port Macquarie-Hastings Council	NSW	324		0.1		7.3%
85	Mackay Regional Council	QLD	294		0.0		3.2%
86	Toowoomba Regional Council	QLD	499		0.0		-9.8%
87	Bathurst Regional Council	NSW	145		0.0		-2.0%
88	Queanbeyan-Palerang Regional Council	NSW	178		0.0		3.5%

Prepared by Ingenium Research - August 2021

4.4. Additional tables for states, territories and LGAs

Table 11: Australia – Total Establishments, Employment and Turnover ($m) – by Core, Non-Core and Supply NTE

| Measure / Sector | 2009 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | Change 2019-20 | |
												Number	Percentage
Core	89,670	94,516	94,961	93,355	96,769	99,714	102,692	106,000	108,601	110,935	113,726	2,791	2.5%
Non-Core	239,534	241,327	237,238	229,038	228,591	228,038	232,308	240,911	254,771	264,869	267,380	2,511	0.9%
Supply	25,376	27,064	27,250	26,691	27,162	26,896	27,447	27,924	28,387	29,607	30,747	1,140	3.9%
Non-NTE	*1,695,541*	*1,769,649*	*1,781,886*	*1,730,718*	*1,747,678*	*1,766,405*	*1,809,033*	*1,863,447*	*1,921,547*	*1,970,385*	*2,010,546*	*40,161*	*2.0%*
Establishments	**2,050,121**	**2,132,556**	**2,141,335**	**2,079,802**	**2,100,200**	**2,121,053**	**2,171,480**	**2,238,282**	**2,313,306**	**2,375,796**	**2,422,399**	**46,603**	**2.0%**
Core	925,925	989,265	972,725	983,970	1,006,300	1,024,235	1,047,745	1,087,025	1,110,285	1,124,300	894,910	-229,390	-20.4%
Non-Core	1,583,125	1,611,365	1,661,855	1,678,835	1,645,590	1,626,350	1,602,850	1,619,005	1,655,970	1,687,230	1,604,695	-82,535	-4.9%
Supply	291,540	302,590	329,500	314,300	323,215	317,310	319,960	322,790	328,960	338,335	333,610	-4,725	-1.4%
Non-NTE	*8,385,990*	*8,649,740*	*8,554,280*	*8,593,625*	*8,577,750*	*9,047,900*	*9,034,730*	*9,226,265*	*9,511,835*	*9,741,545*	*9,569,635*	*-171,910*	*-1.8%*
Employment	**11,186,580**	**11,552,955**	**11,518,360**	**11,570,730**	**11,552,860**	**12,015,795**	**12,005,285**	**12,255,085**	**12,607,050**	**12,891,410**	**12,397,530**	**-493,880**	**-3.8%**
Core	$90,171	$97,214	$100,157	$102,215	$108,239	$116,747	$122,995	$126,774	$133,954	$139,535	$127,596	-$11,939	-8.6%
Non-Core	$328,399	$340,202	$374,352	$375,635	$388,579	$430,497	$442,419	$459,603	$485,295	$506,213	$526,889	$20,676	4.1%
Supply	$111,473	$115,647	$129,996	$128,038	$131,308	$130,526	$130,931	$129,180	$137,418	$144,118	$147,467	$3,349	2.3%
Non-NTE	*$2,122,593*	*$2,211,386*	*$2,305,730*	*$2,355,523*	*$2,415,628*	*$2,484,535*	*$2,500,162*	*$2,594,356*	*$2,749,612*	*$2,945,873*	*$3,026,052*	*$80,179*	*2.7%*
Turnover (A$m)	**$2,652,637**	**$2,764,449**	**$2,910,235**	**$2,961,411**	**$3,043,754**	**$3,162,305**	**$3,196,507**	**$3,309,913**	**$3,506,279**	**$3,735,739**	**$3,825,850**	**$90,111**	**2.4%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

4.4.1. Australian Capital Territory / Canberra

Table 12: Australian Capital Territory – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

| Measure / Sector | 2009 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | Change 2019-20 | |
												Number	Percentage
Drink	109	109	102	101	106	106	100	110	110	113	99	-14	-12.4%
Entertainment	427	422	415	407	415	418	429	441	413	480	472	-8	-1.7%
Food	872	957	965	962	1,059	1,119	1,156	1,201	1,226	1,225	1,240	15	1.2%
Establishments	**1,408**	**1,488**	**1,482**	**1,470**	**1,580**	**1,643**	**1,685**	**1,752**	**1,749**	**1,818**	**1,811**	**-7**	**-0.4%**
Drink	1,940	2,115	1,860	1,685	1,820	2,085	2,200	2,150	2,000	2,030	2,105	75	3.7%
Entertainment	5,555	5,745	5,355	5,500	5,880	6,165	6,760	6,920	6,585	6,805	6,120	-685	-10.1%
Food	16,920	18,010	19,890	19,425	18,020	18,895	19,030	20,625	21,360	21,025	22,825	1,800	8.6%
Employment	**24,415**	**25,870**	**27,110**	**26,610**	**25,715**	**27,145**	**27,990**	**29,695**	**29,945**	**29,860**	**31,050**	**1,190**	**4.0%**
Drink	$250	$264	$294	$166	$295	$270	$273	$274	$276	$286	$277	-$8.9	-3.1%
Entertainment	$694	$698	$609	$594	$679	$837	$927	$928	$926	$1,013	$1,018	$5.5	0.5%
Food	$1,426	$1,565	$1,807	$1,820	$1,768	$1,772	$1,844	$1,998	$2,150	$2,165	$2,057	-$108.3	-5.0%
Turnover (A$m)	**$2,370**	**$2,528**	**$2,710**	**$2,580**	**$2,742**	**$2,878**	**$3,044**	**$3,201**	**$3,352**	**$3,464**	**$3,352**	**-$111.7**	**-3.2%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

4.4.2. New South Wales

Table 13: New South Wales – Core NTE Establishments, Employment and Turnover ($m) – by sub-sector

| Measure / Sector | 2009 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | Change 2019-20 | |
												Number	Percentage
Drink	2,717	2,777	2,786	2,735	2,818	2,817	2,868	2,910	2,926	2,910	2,894	-16	-0.5%
Entertainment	10,981	11,157	10,960	10,472	10,501	10,664	10,738	11,029	11,408	11,863	12,347	484	4.1%
Food	17,644	18,987	19,352	18,907	20,082	20,763	21,505	22,257	22,771	23,013	23,116	103	0.4%
Establishments	**31,342**	**32,921**	**33,098**	**32,114**	**33,401**	**34,244**	**35,111**	**36,196**	**37,105**	**37,786**	**38,357**	**571**	**1.5%**
Drink	44,125	44,890	40,940	41,150	40,660	42,670	43,115	43,560	44,495	43,300	33,830	-9,470	-21.9%
Entertainment	80,685	79,710	83,085	84,220	85,455	88,175	90,935	90,060	94,080	97,430	65,670	-31,760	-32.6%
Food	169,940	185,045	175,820	178,970	185,520	186,060	187,570	195,735	198,995	201,995	150,460	-51,535	-25.5%
Employment	**294,745**	**309,645**	**299,845**	**304,345**	**311,630**	**316,905**	**321,620**	**329,355**	**337,565**	**342,720**	**249,960**	**-92,760**	**-27.1%**
Drink	$4,925	$5,007	$4,970	$5,135	$5,525	$6,056	$6,437	$6,509	$6,827	$6,888	$6,682	-$205.8	-3.0%
Entertainment	$9,551	$9,246	$9,895	$9,459	$10,024	$12,700	$13,390	$13,180	$14,132	$15,122	$13,387	-$1,734.3	-11.5%
Food	$14,323	$16,084	$15,973	$16,532	$18,207	$17,444	$18,174	$18,964	$20,028	$20,797	$18,348	-$2,448.9	-11.8%
Turnover (A$m)	**$28,799**	**$30,337**	**$30,839**	**$31,126**	**$33,757**	**$36,199**	**$38,001**	**$38,652**	**$40,987**	**$42,807**	**$38,417**	**-$4,389.1**	**-10.3%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

| Measure / Sector | 2009 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | Change 2019-20 | |
												Number	Percentage
Drink	111	101	98	102	104	111	104	111	114	109	109	0	0.0%
Entertainment	278	276	277	259	266	243	219	231	235	248	269	21	8.5%
Food	400	412	428	412	447	470	435	480	491	497	497	0	0.0%
Establishments	**789**	**789**	**803**	**773**	**817**	**824**	**758**	**822**	**840**	**854**	**875**	**21**	**2.5%**
Drink	1,740	1,540	1,765	1,950	1,775	1,675	1,710	1,880	2,040	1,940	1,895	-45	-2.3%
Entertainment	3,830	3,420	3,760	3,450	3,520	3,470	3,415	3,420	3,605	3,570	3,515	-55	-1.5%
Food	4,490	4,800	4,875	5,565	6,125	6,730	6,835	7,590	7,635	7,685	5,765	-1,920	-25.0%
Employment	**10,060**	**9,760**	**10,400**	**10,965**	**11,425**	**11,875**	**11,960**	**12,890**	**13,280**	**13,195**	**11,170**	**-2,025**	**-15.3%**
Drink	$173	$160	$160	$180	$173	$159	$164	$181	$202	$200	$202	$2.3	1.1%
Entertainment	$459	$401	$464	$437	$426	$478	$501	$515	$613	$602	$632	$29.9	5.0%
Food	$378	$417	$443	$514	$597	$637	$662	$736	$773	$800	$654	-$145.8	-18.2%
Turnover (A$m)	**$1,011**	**$978**	**$1,067**	**$1,132**	**$1,196**	**$1,274**	**$1,328**	**$1,432**	**$1,588**	**$1,601**	**$1,487**	**-$113.7**	**-7.1%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink						72	73	73	77	87	87	0	0.0%
Entertainment						590	573	576	609	633	646	13	2.1%
Food						735	734	769	796	819	786	-33	-4.0%
Establishments						**1,397**	**1,380**	**1,418**	**1,482**	**1,539**	**1,519**	**-20**	**-1.3%**
Drink						760	795	810	905	930	800	-130	-14.0%
Entertainment						2,895	2,840	2,605	2,625	2,690	2,300	-390	-14.5%
Food						4,870	5,070	5,360	5,485	5,670	4,320	-1,350	-23.8%
Employment						**8,525**	**8,705**	**8,775**	**9,010**	**9,290**	**7,420**	**-1,870**	**-20.1%**
Drink						$117	$121	$124	$143	$147	$145	-$2.4	-1.6%
Entertainment						$295	$301	$280	$317	$327	$294	-$33.5	-10.2%
Food						$444	$473	$500	$535	$568	$474	-$93.9	-16.5%
Turnover (A$m)						**$856**	**$895**	**$905**	**$995**	**$1,042**	**$912**	**-$129.7**	**-12.5%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	45	46	46	41	37	34	43	46	35	38	39	1	2.6%
Entertainment	240	250	235	222	217	225	198	224	244	228	256	28	12.3%
Food	646	761	804	778	886	924	897	901	953	961	1,000	39	4.1%
Establishments	**931**	**1,057**	**1,085**	**1,041**	**1,140**	**1,183**	**1,138**	**1,171**	**1,232**	**1,227**	**1,295**	**68**	**5.5%**
Drink	550	700	680	710	570	490	535	565	410	440	385	-55	-12.5%
Entertainment	2,350	2,245	2,255	1,965	2,010	2,120	2,080	2,205	2,375	2,325	1,890	-435	-18.7%
Food	4,745	5,160	5,885	5,240	5,735	6,020	5,255	5,310	5,715	5,630	4,535	-1,095	-19.4%
Employment	**7,645**	**8,100**	**8,815**	**7,910**	**8,310**	**8,630**	**7,870**	**8,075**	**8,500**	**8,395**	**6,810**	**-1,585**	**-18.9%**
Drink	$75	$87	$62	$66	$56	$46	$85	$90	$78	$85	$85	-$0.6	-0.7%
Entertainment	$282	$263	$278	$248	$243	$292	$445	$448	$519	$514	$454	-$59.5	-11.6%
Food	$400	$448	$535	$484	$559	$570	$490	$496	$557	$564	$493	-$70.9	-12.6%
Turnover (A$m)	**$757**	**$798**	**$874**	**$798**	**$857**	**$909**	**$1,021**	**$1,034**	**$1,155**	**$1,163**	**$1,032**	**-$130.9**	**-11.3%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	416	430	562	546	576	530	547	574	595	608	606	-2	-0.3%
Entertainment	835	874	838	783	826	823	859	870	878	929	920	-9	-1.0%
Food	2,730	3,065	3,290	3,148	3,354	3,254	3,378	3,428	3,463	3,559	3,587	28	0.8%
Establishments	**3,981**	**4,369**	**4,690**	**4,477**	**4,756**	**4,607**	**4,784**	**4,872**	**4,936**	**5,096**	**5,113**	**17**	**0.3%**
Drink	4,310	3,990	4,805	5,180	5,285	5,145	5,125	5,570	5,360	5,615	4,675	-940	-16.7%
Entertainment	6,735	6,575	6,785	6,915	7,285	7,200	7,430	7,610	7,850	8,030	5,600	-2,430	-30.3%
Food	17,300	16,650	18,335	18,255	19,305	20,065	20,930	22,395	22,405	22,500	17,045	-5,455	-24.2%
Employment	**28,345**	**27,210**	**29,930**	**30,350**	**31,875**	**32,410**	**33,485**	**35,580**	**35,610**	**36,145**	**27,315**	**-8,830**	**-24.4%**
Drink	$445	$422	$535	$586	$631	$597	$602	$642	$649	$700	$639	-$60.5	-8.6%
Entertainment	$940	$886	$962	$1,007	$1,014	$1,139	$1,186	$1,245	$1,375	$1,489	$1,276	-$213.4	-14.3%
Food	$1,458	$1,447	$1,666	$1,687	$1,881	$1,900	$2,029	$2,172	$2,270	$2,340	$1,965	-$375.0	-16.0%
Turnover (A$m)	**$2,843**	**$2,756**	**$3,163**	**$3,280**	**$3,526**	**$3,637**	**$3,817**	**$4,059**	**$4,294**	**$4,529**	**$3,880**	**-$649.0**	**-14.3%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

4.4.3. Northern Territory

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	54	55	62	57	56	60	50	50	47	49	54	5	10.2%
Entertainment	235	239	221	229	221	207	221	231	222	236	258	22	9.3%
Food	365	397	394	389	406	415	449	473	458	472	471	-1	-0.2%
Establishments	**654**	**691**	**677**	**675**	**683**	**682**	**720**	**754**	**727**	**757**	**783**	**26**	**3.4%**
Drink	1,960	2,055	3,205	3,270	5,285	2,730	2,580	2,415	2,430	2,455	1,930	-525	-21.4%
Entertainment	3,320	4,025	2,290	2,280	2,940	5,860	6,400	6,130	6,195	5,950	3,150	-2,800	-47.1%
Food	6,720	7,205	8,830	8,515	7,905	9,235	9,705	10,155	10,105	9,970	7,445	-2,525	-25.3%
Employment	**11,995**	**13,285**	**14,325**	**14,070**	**16,130**	**17,825**	**18,685**	**18,700**	**18,725**	**18,375**	**12,525**	**-5,850**	**-31.8%**
Drink	$215	$221	$385	$427	$599	$293	$260	$243	$256	$261	$232	-$28.9	-11.1%
Entertainment	$377	$475	$268	$216	$354	$970	$1,005	$945	$974	$983	$815	-$167.8	-17.1%
Food	$566	$626	$802	$851	$776	$866	$940	$984	$1,017	$1,027	$865	-$162.1	-15.8%
Turnover (A$m)	**$1,158**	**$1,322**	**$1,455**	**$1,494**	**$1,729**	**$2,128**	**$2,205**	**$2,173**	**$2,247**	**$2,270**	**$1,912**	**-$358.8**	**-15.8%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

Prepared by Ingenium Research - August 2021

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	21	23	23	19	17	15	19	18	15	17	28	11	64.7%
Entertainment	124	126	118	105	101	99	113	110	120	114	111	-3	-2.6%
Food	197	214	220	214	219	229	263	281	266	276	279	3	1.1%
Establishments	342	363	361	338	337	343	395	409	401	407	418	11	2.7%
Drink	315	320	515	515	525	435	430	415	385	415	330	-85	-20.5%
Entertainment	1,905	1,830	1,755	1,620	1,610	1,555	1,700	1,675	1,750	1,655	940	-715	-43.2%
Food	2,330	2,340	2,605	2,620	2,725	3,100	3,155	3,550	3,285	3,470	2,465	-1,005	-29.0%
Employment	4,550	4,490	4,870	4,760	4,860	5,090	5,290	5,640	5,420	5,545	3,735	-1,810	-32.6%
Drink	$38	$39	$47	$48	$51	$41	$42	$40	$39	$43	$43	$0.2	0.5%
Entertainment	$229	$214	$216	$206	$195	$214	$245	$243	$289	$273	$224	-$49.1	-18.0%
Food	$196	$204	$237	$242	$266	$294	$306	$344	$333	$361	$305	-$56.1	-15.5%
Turnover (A$m)	$463	$457	$500	$496	$512	$549	$592	$627	$661	$678	$573	-$105.0	-15.5%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

4.4.4. Queensland

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	1,217	1,183	1,153	1,138	1,127	1,147	1,144	1,143	1,163	1,153	1,141	-12	-1.0%
Entertainment	5,735	5,782	5,669	5,414	5,382	5,392	5,427	5,628	5,782	6,044	6,256	212	3.5%
Food	9,369	10,070	10,104	10,150	10,778	11,328	11,845	12,346	12,581	12,553	12,482	-71	-0.6%
Establishments	16,321	17,035	16,926	16,702	17,287	17,867	18,416	19,117	19,526	19,750	19,879	129	0.7%
Drink	21,115	22,635	24,975	23,630	22,915	23,535	23,320	24,315	24,685	24,295	21,120	-3,175	-13.1%
Entertainment	44,295	45,145	53,685	58,025	56,465	55,065	55,395	57,045	58,410	57,650	37,895	-19,755	-34.3%
Food	121,965	132,455	127,930	129,485	136,870	131,470	132,220	140,075	141,600	140,510	119,770	-20,740	-14.8%
Employment	187,375	200,235	206,585	211,140	216,255	210,070	210,930	221,435	224,695	222,455	178,780	-43,675	-19.6%
Drink	$2,081	$2,274	$2,742	$2,692	$2,741	$2,653	$2,731	$2,834	$2,961	$2,925	$2,750	-$174.9	-6.0%
Entertainment	$5,479	$5,462	$6,882	$6,805	$6,857	$8,475	$8,710	$8,847	$9,245	$9,521	$8,563	-$958.7	-10.1%
Food	$10,280	$11,513	$11,623	$12,577	$13,433	$12,326	$12,811	$13,571	$14,251	$14,466	$12,871	-$1,595.3	-11.0%
Turnover (A$m)	$17,840	$19,249	$21,247	$22,074	$23,032	$23,454	$24,252	$25,252	$26,457	$26,912	$24,183	-$2,728.9	-10.1%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	262	280	271	268	262	259	278	281	297	303	296	-7	-2.3%
Entertainment	1,597	1,703	1,675	1,563	1,583	1,573	1,611	1,671	1,738	1,845	1,938	93	5.0%
Food	2,780	3,214	3,307	3,294	3,490	3,739	4,078	4,244	4,343	4,376	4,395	19	0.4%
Establishments	4,639	5,197	5,253	5,125	5,335	5,571	5,967	6,196	6,378	6,524	6,629	105	1.6%
Drink	4,580	4,480	4,475	4,890	4,555	4,295	4,500	4,605	4,555	4,755	4,035	-720	-15.1%
Entertainment	14,295	12,285	16,960	16,595	16,415	16,605	17,725	18,095	18,270	18,990	14,555	-4,435	-23.4%
Food	32,345	35,435	36,865	37,095	38,990	42,470	43,830	47,020	45,925	46,450	41,425	-5,025	-10.8%
Employment	51,225	52,200	58,300	58,580	59,960	63,370	66,055	69,725	68,750	70,190	60,015	-10,175	-14.5%
Drink	$417	$423	$407	$452	$444	$407	$445	$446	$474	$496	$437	-$58.5	-11.8%
Entertainment	$1,834	$1,525	$2,091	$2,102	$1,988	$2,285	$2,520	$2,589	$2,956	$3,122	$2,876	-$245.6	-7.9%
Food	$2,726	$3,080	$3,349	$3,428	$3,799	$4,022	$4,300	$4,616	$4,709	$4,889	$4,423	-$466.5	-9.5%
Turnover (A$m)	$4,978	$5,029	$5,847	$5,982	$6,231	$6,715	$7,264	$7,652	$8,140	$8,507	$7,736	-$770.5	-9.1%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink			142	136	133	133	137	128	144	151	161	10	6.6%
Entertainment			988	940	931	961	988	1,021	1,088	1,104	1,143	39	3.5%
Food			1,757	1,700	1,795	1,865	1,965	2,067	2,149	2,152	2,095	-57	-2.6%
Establishments			2,887	2,776	2,859	2,959	3,090	3,216	3,381	3,407	3,399	-8	-0.2%
Drink			2,045	2,130	2,340	2,260	2,480	2,270	2,530	2,545	2,355	-190	-7.5%
Entertainment			10,160	9,535	9,435	9,825	9,810	10,310	11,215	11,325	7,810	-3,515	-31.0%
Food			16,975	17,120	18,110	19,655	20,015	21,950	21,805	22,305	18,765	-3,540	-15.9%
Employment			29,180	28,785	29,885	31,735	32,305	34,530	35,550	36,175	28,935	-7,240	-20.0%
Drink			$186	$197	$228	$214	$240	$220	$257	$266	$258	-$7.6	-2.9%
Entertainment			$1,252	$1,207	$1,143	$1,352	$1,407	$1,501	$1,837	$1,869	$1,607	-$261.5	-14.0%
Food			$1,542	$1,582	$1,765	$1,861	$1,940	$2,129	$2,209	$2,319	$1,983	-$336.2	-14.5%
Turnover (A$m)			$2,980	$2,986	$3,136	$3,428	$3,587	$3,849	$4,303	$4,454	$3,849	-$605.3	-13.6%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

Prepared by Ingenium Research - August 2021

4.4.5. South Australia

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	799	779	783	780	792	806	795	792	788	773	783	10	1.3%
Entertainment	1,766	1,774	1,702	1,611	1,575	1,600	1,632	1,671	1,676	1,765	1,837	72	4.1%
Food	3,134	3,303	3,420	3,419	3,572	3,708	3,860	3,978	4,015	4,064	4,143	79	1.9%
Establishments	5,699	5,856	5,905	5,810	5,939	6,114	6,287	6,441	6,479	6,602	6,763	161	2.4%
Drink	16,075	17,150	14,880	13,260	12,230	12,690	12,455	11,940	12,010	12,315	10,200	-2,115	-17.2%
Entertainment	14,790	14,405	11,600	12,240	13,260	14,320	14,885	14,790	15,400	15,290	13,990	-1,300	-8.5%
Food	39,555	41,300	41,970	41,430	46,125	48,150	49,000	50,105	51,105	51,355	41,580	-9,775	-19.0%
Employment	70,420	72,855	68,445	66,930	71,615	75,160	76,340	76,835	78,515	78,960	65,770	-13,190	-16.7%
Drink	$1,604	$1,736	$1,548	$1,518	$1,412	$1,501	$1,521	$1,516	$1,560	$1,632	$1,624	-$8.0	-0.5%
Entertainment	$1,879	$1,773	$1,487	$1,307	$1,601	$2,165	$2,266	$2,225	$2,334	$2,422	$2,198	-$224.3	-9.3%
Food	$3,334	$3,590	$3,813	$3,915	$4,527	$4,514	$4,748	$4,855	$5,144	$5,287	$4,762	-$525.7	-9.9%
Turnover (A$m)	$6,817	$7,098	$6,848	$6,740	$7,540	$8,180	$8,534	$8,596	$9,037	$9,341	$8,583	-$758.0	-8.1%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	118	109	112	110	133	131	142	133	139	131	133	2	1.5%
Entertainment	123	119	122	113	115	114	121	117	115	112	120	8	7.1%
Food	505	511	560	533	520	521	563	558	579	599	608	9	1.5%
Establishments	746	739	794	756	768	766	826	808	833	842	861	19	2.3%
Drink	2,335	2,225	1,900	2,125	2,355	2,255	2,330	2,305	2,135	2,135	1,755	-380	-17.8%
Entertainment	1,600	1,735	2,040	1,710	1,925	1,660	1,650	1,700	1,685	1,610	1,475	-135	-8.4%
Food	6,445	6,190	6,420	6,530	6,270	7,100	7,080	7,360	7,470	7,665	5,885	-1,780	-23.2%
Employment	10,380	10,145	10,360	10,360	10,550	11,015	11,060	11,365	11,290	11,405	9,115	-2,290	-20.1%
Drink	$214	$209	$173	$196	$230	$214	$226	$223	$216	$222	$205	-$17.6	-7.9%
Entertainment	$192	$203	$252	$216	$233	$229	$240	$249	$273	$262	$243	-$18.3	-7.0%
Food	$543	$538	$583	$603	$611	$672	$686	$714	$757	$797	$689	-$108.1	-13.6%
Turnover (A$m)	$949	$950	$1,008	$1,016	$1,073	$1,115	$1,152	$1,186	$1,247	$1,281	$1,137	-$144.0	-11.2%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

4.4.6. Tasmania

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	227	246	250	235	215	224	224	234	230	222	223	1	0.5%
Entertainment	562	596	561	539	515	529	516	522	556	597	598	1	0.2%
Food	1,043	1,062	1,095	1,069	1,085	1,107	1,151	1,204	1,263	1,350	1,468	118	8.7%
Establishments	1,832	1,904	1,906	1,843	1,815	1,860	1,891	1,960	2,049	2,169	2,289	120	5.5%
Drink	4,310	4,260	4,925	4,885	3,585	3,740	3,445	3,635	3,380	3,180	3,025	-155	-4.9%
Entertainment	3,975	5,585	5,120	5,280	3,415	5,025	4,755	5,175	5,245	5,485	3,435	-2,050	-37.4%
Food	13,100	12,165	12,015	12,720	11,630	12,710	13,350	14,515	14,925	15,275	15,150	-125	-0.8%
Employment	21,390	22,005	22,060	22,885	18,630	21,475	21,550	23,330	23,550	23,940	21,615	-2,325	-9.7%
Drink	$415	$402	$533	$529	$433	$420	$462	$435	$441	$425	$389	-$36.1	-8.5%
Entertainment	$500	$688	$667	$623	$406	$781	$753	$804	$852	$931	$820	-$110.7	-11.9%
Food	$1,104	$1,057	$1,091	$1,085	$1,141	$1,192	$1,293	$1,407	$1,502	$1,572	$1,414	-$158.8	-10.1%
Turnover (A$m)	$2,019	$2,147	$2,291	$2,237	$1,980	$2,393	$2,508	$2,645	$2,796	$2,929	$2,623	-$305.6	-10.4%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	71	70	69	64	59	62	59	61	54	55	58	3	5.5%
Entertainment	118	118	115	119	123	118	107	101	106	129	126	-3	-2.3%
Food	264	278	295	297	298	301	278	307	342	365	405	40	11.0%
Establishments	453	466	479	480	480	481	444	469	502	549	589	40	7.3%
Drink	1,215	995	1,020	1,075	1,060	1,100	1,145	1,060	960	970	825	-145	-14.9%
Entertainment	1,285	1,370	1,270	1,565	1,485	1,445	1,410	1,325	1,315	1,405	1,040	-365	-26.0%
Food	3,395	3,085	3,165	3,245	3,480	3,600	4,040	4,185	4,350	4,665	4,720	55	1.2%
Employment	5,895	5,445	5,455	5,885	6,020	6,145	6,595	6,575	6,625	7,040	6,585	-455	-6.5%
Drink	$111	$97	$93	$99	$103	$104	$111	$105	$97	$111	$98	-$13.3	-12.0%
Entertainment	$154	$160	$157	$198	$180	$199	$205	$198	$220	$229	$198	-$31.4	-13.7%
Food	$286	$268	$288	$300	$339	$341	$391	$406	$441	$485	$445	-$40.3	-8.3%
Turnover (A$m)	$551	$525	$537	$597	$622	$644	$707	$708	$757	$826	$741	-$85.0	-10.3%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

Prepared by Ingenium Research - August 2021

4.4.7. Victoria

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	2,286	2,284	2,262	2,229	2,284	2,327	2,338	2,371	2,405	2,431	2,478	47	1.9%
Entertainment	7,746	7,999	7,854	7,659	7,750	7,908	7,969	8,262	8,663	9,081	9,681	600	6.6%
Food	14,327	15,807	16,173	16,236	17,013	17,650	18,559	19,224	19,776	20,287	21,394	1,107	5.5%
Establishments	24,359	26,090	26,289	26,124	27,047	27,885	28,866	29,857	30,844	31,799	33,553	1,754	5.5%
Drink	30,485	30,745	26,250	25,405	27,085	27,010	27,860	28,080	28,270	28,480	23,540	-4,940	-17.3%
Entertainment	53,730	56,850	49,775	51,760	54,305	59,910	63,785	66,675	69,215	72,275	52,725	-19,550	-27.0%
Food	136,765	153,165	150,465	151,710	158,225	159,360	167,440	176,005	182,210	186,790	155,750	-31,040	-16.6%
Employment	220,980	240,760	226,490	228,880	239,615	246,280	259,085	270,760	279,695	287,545	232,015	-55,530	-19.3%
Drink	$3,503	$3,597	$3,395	$3,366	$3,706	$3,870	$4,198	$4,262	$4,497	$4,715	$4,655	-$60.1	-1.3%
Entertainment	$6,927	$7,139	$6,531	$6,081	$6,795	$10,282	$10,994	$11,335	$12,066	$12,981	$11,930	-$1,050.5	-8.1%
Food	$11,527	$13,313	$13,670	$14,660	$15,529	$14,941	$16,224	$17,053	$18,338	$19,231	$17,608	-$1,623.9	-8.4%
Turnover (A$m)	$21,958	$24,048	$23,597	$24,107	$26,029	$29,092	$31,416	$32,649	$34,901	$36,927	$34,193	-$2,734.5	-7.4%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	24	26	21	18	18	16	20	21	25	19	20	1	5.3%
Entertainment	112	121	115	102	96	78	94	98	116	110	126	16	14.5%
Food	197	216	221	212	231	224	239	244	276	284	281	-3	-1.1%
Establishments	333	363	357	332	345	318	353	363	417	413	427	14	3.4%
Drink	215	260	240	270	265	265	285	295	315	270	245	-25	-9.3%
Entertainment	1,135	890	900	855	800	625	625	735	805	735	545	-190	-25.9%
Food	1,275	1,365	1,465	1,420	1,530	1,575	1,850	1,745	2,025	2,170	1,770	-400	-18.4%
Employment	2,630	2,520	2,600	2,545	2,590	2,470	2,755	2,775	3,145	3,175	2,560	-615	-19.4%
Drink	$30	$36	$22	$25	$26	$25	$30	$31	$38	$32	$30	-$1.6	-4.9%
Entertainment	$136	$105	$111	$108	$97	$86	$92	$112	$139	$124	$107	-$17.0	-13.7%
Food	$108	$119	$133	$131	$149	$149	$179	$169	$205	$226	$193	-$33.2	-14.7%
Turnover (A$m)	$274	$260	$265	$264	$271	$261	$302	$313	$382	$382	$330	-$51.7	-13.5%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	256	254	258	240	260	273	265	248	243	224	230	6	2.7%
Entertainment	456	495	501	468	488	475	473	468	497	514	557	43	8.4%
Food	1,325	1,639	1,686	1,658	1,732	1,652	1,697	1,689	1,770	1,809	1,980	171	9.5%
Establishments	2,037	2,388	2,445	2,366	2,480	2,400	2,435	2,405	2,510	2,547	2,767	220	8.6%
Drink	3,655	3,305	3,160	3,470	3,645	3,625	3,385	3,285	3,335	3,080	2,665	-415	-13.5%
Entertainment	6,430	5,300	5,470	5,590	5,560	5,210	5,520	5,420	5,730	5,895	4,645	-1,250	-21.2%
Food	13,860	15,640	16,000	16,780	17,370	18,230	19,385	21,665	22,065	23,075	19,785	-3,290	-14.3%
Employment	23,945	24,245	24,630	25,840	26,575	27,060	28,290	30,370	31,130	32,045	27,095	-4,950	-15.4%
Drink	$360	$345	$287	$321	$355	$343	$327	$307	$326	$312	$287	-$25.3	-8.1%
Entertainment	$771	$622	$675	$708	$674	$717	$817	$810	$968	$981	$894	-$87.4	-8.9%
Food	$1,168	$1,360	$1,454	$1,551	$1,692	$1,727	$1,879	$2,101	$2,235	$2,400	$2,169	-$230.5	-9.6%
Turnover (A$m)	$2,299	$2,326	$2,415	$2,579	$2,721	$2,787	$3,022	$3,219	$3,529	$3,693	$3,350	-$343.2	-9.3%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Percentage
Drink	112	115	109	114	117	119	113	105	106	108	111	3	2.8%
Entertainment	466	483	468	453	473	454	479	485	487	472	499	27	5.7%
Food	506	577	591	580	608	627	648	684	657	659	689	30	4.6%
Establishments	1,084	1,175	1,168	1,147	1,198	1,200	1,240	1,274	1,250	1,239	1,299	60	4.8%
Drink	1,605	1,565	1,540	1,570	1,625	1,560	1,465	1,500	1,425	1,410	1,275	-135	-9.6%
Entertainment	3,440	3,540	3,690	3,560	3,840	4,010	4,125	4,270	3,945	3,825	2,865	-960	-25.1%
Food	5,310	5,465	6,070	6,345	6,720	6,990	7,485	8,075	7,335	7,830	6,595	-1,235	-15.8%
Employment	10,360	10,565	11,300	11,475	12,190	12,555	13,070	13,845	12,710	13,065	10,735	-2,330	-17.8%
Drink	$173	$174	$140	$145	$158	$148	$145	$146	$151	$155	$157	$2.2	1.4%
Entertainment	$412	$415	$455	$451	$466	$552	$614	$663	$694	$651	$558	-$93.2	-14.3%
Food	$448	$475	$551	$587	$655	$662	$725	$783	$743	$814	$722	-$92.2	-11.3%
Turnover (A$m)	$1,032	$1,064	$1,146	$1,182	$1,279	$1,361	$1,484	$1,593	$1,588	$1,621	$1,437	-$183.3	-11.3%

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

Prepared by Ingenium Research - August 2021

4.4.8. Western Australia

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Change 2019-20 Percentage
Drink	912	933	928	927	929	951	956	980	962	966	950	-16	-1.7%
Entertainment	2,420	2,524	2,498	2,411	2,437	2,519	2,576	2,640	2,674	2,828	2,921	93	3.3%
Food	4,635	4,979	5,094	5,123	5,497	5,862	6,113	6,333	6,437	6,493	6,405	-88	-1.4%
Establishments	**7,967**	**8,436**	**8,520**	**8,461**	**8,863**	**9,332**	**9,645**	**9,953**	**10,073**	**10,287**	**10,276**	**-11**	**-0.1%**
Drink	16,175	17,350	16,685	18,245	14,635	16,430	16,910	17,275	16,840	17,100	14,495	-2,605	-15.2%
Entertainment	14,870	17,710	18,890	18,745	19,095	18,850	19,380	19,465	20,165	20,975	17,470	-3,505	-16.7%
Food	63,555	69,545	72,295	72,125	72,985	74,100	75,250	80,175	80,590	82,375	71,235	-11,140	-13.5%
Employment	**94,605**	**104,605**	**107,870**	**109,115**	**106,710**	**109,375**	**111,545**	**116,915**	**117,590**	**120,450**	**103,200**	**-17,250**	**-14.3%**
Drink	$1,973	$2,248	$2,125	$2,410	$1,883	$2,339	$2,472	$2,635	$2,676	$2,746	$2,706	-$40.2	-1.5%
Entertainment	$1,881	$2,191	$2,477	$2,345	$2,384	$3,137	$3,270	$3,202	$3,390	$3,658	$3,547	-$110.3	-3.0%
Food	$5,357	$6,045	$6,568	$7,102	$7,163	$6,947	$7,291	$7,768	$8,111	$8,481	$8,079	-$402.3	-4.7%
Turnover (A$m)	**$9,211**	**$10,484**	**$11,170**	**$11,856**	**$11,430**	**$12,422**	**$13,034**	**$13,606**	**$14,178**	**$14,885**	**$14,332**	**-$552.9**	**-3.7%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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

Measure / Sector	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Change 2019-20 Number	Change 2019-20 Percentage
Drink	91	98	109	116	100	91	80	87	95	113	107	-6	-5.3%
Entertainment	129	131	126	128	113	98	62	65	69	81	80	-1	-1.2%
Food	457	502	516	534	556	599	456	453	458	444	436	-8	-1.8%
Establishments	**677**	**731**	**751**	**778**	**769**	**788**	**598**	**605**	**622**	**638**	**623**	**-15**	**-2.4%**
Drink	1,775	1,590	1,755	2,010	1,930	1,940	1,900	1,940	2,120	2,335	2,030	-305	-13.1%
Entertainment	2,150	1,810	1,490	1,405	1,385	1,330	1,190	1,045	1,240	1,345	1,065	-280	-20.8%
Food	6,505	6,245	6,365	6,795	6,490	7,335	6,735	6,445	6,570	6,335	5,185	-1,150	-18.2%
Employment	**10,430**	**9,640**	**9,610**	**10,210**	**9,805**	**10,600**	**9,825**	**9,430**	**9,930**	**10,015**	**8,280**	**-1,735**	**-17.3%**
Drink	$170	$159	$160	$186	$188	$184	$184	$188	$215	$241	$224	-$17.4	-7.2%
Entertainment	$258	$212	$184	$178	$168	$183	$170	$148	$198	$213	$204	-$9.1	-4.3%
Food	$548	$543	$578	$628	$633	$695	$653	$625	$666	$659	$619	-$40.3	-6.1%
Turnover (A$m)	**$976**	**$913**	**$921**	**$992**	**$988**	**$1,061**	**$1,007**	**$962**	**$1,079**	**$1,113**	**$1,046**	**-$66.9**	**-6.0%**

Based on 2021 Australian Bureau of Statistics data (CABEE 2016-2020 dataset)

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