

# The Australian Night Time Economy

## *Looking to the future - Appendices*

Survey findings and references

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

December 2021



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### Document Information

Project Reference Number	P21-10-01
Title	The Australian Night Time Economy: Looking to the future Appendices
Version number	Final
Last update	21/12/21
Name of Authors	Anna Edwards, Andrew License
Document Status	Publicly available
Approval Status	Final

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21 December 2021



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# Survey

As part of this project, the Council of Capital City Lord Mayors (CCCLM) commissioned the first *Australian Night Time Industries Survey*. The survey ran between the 18<sup>th</sup> and 30<sup>th</sup> November 2021 and was distributed to night time economy businesses across Australia through city councils, industry bodies and key stakeholders.

The survey received a total of 262 complete responses and results were weighted to the Australian Bureau of Statistics' Counts of Australian Businesses, including Entries and Exits dataset based on state / territory and industry grouping, to ensure proportions reflected the distribution of entity population groupings.

Some states and territories gave fewer responses, so to ensure figures are robust, states and territories have been grouped together based on similarities around restriction / lockdowns, along with the number of community transmission cases they have experienced:

- High impact (more than 2,000 community transmission cases)
  - Grouping Australian Capital Territory, New South Wales and Victoria
- Low impact (fewer than 2,000 community transmission cases)
  - Grouping Northern Territory, Queensland, South Australia, Tasmania and Western Australia.

The results of the questions for these area groupings and for Australia are provided over the following pages.

*Table 1: Survey distribution compared to business population distribution (ABS CABEE 2020)*

State / Territory	Survey		Total establishments <sup>1</sup>	
	(n)	%	(n)	%
Australian Capital Territory	23	9%	2,304	1%
New South Wales	79	30%	52,875	34%
Northern Territory	6	2%	1,144	1%
Queensland	23	9%	27,612	18%
South Australia	12	5%	8,538	6%
Tasmania	49	19%	3,148	2%
Victoria	21	8%	44,606	29%
Western Australia	60	23%	14,118	9%
<b>Australia</b>	<b>262</b>	<b>100%</b>	<b>154,338</b>	<b>100%</b>

<sup>1</sup> Australian and New Zealand Standard Industrial Classifications (ANZSICs) covered by the survey are listed below and so the total establishments population is based on these industries:

- 4400 Accommodation, 4511 Cafes and Restaurants, 4512 Takeaway Food Services, 4520 Pubs, Taverns and Bars, 4530 Clubs (Hospitality), 5513 Motion Picture Exhibition, 900 Creative and Performing Arts Activities, 913 Amusement and Other Recreation Activities, 920 Gambling Activities, 9112 Sports and Physical Recreation Clubs and Sports Professionals, 9534 Brothel Keeping and Prostitution.
- Survey responses were also received from several taxi companies. As such, 4623 Taxi and Other Road Transport was also included in the total establishment comparison.

## COVID Impacts

Table 2: At this point in time, how does your business activity / sales turnover compare to a similar time pre-COVID (e.g. November 2019)?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Substantially increased (more than 50% increase)	1%	3%	0%
Increased	8%	18%	2%
Similar to pre-COVID levels	19%	28%	15%
Decreased	35%	25%	41%
Substantially decreased (more than 50% decline)	37%	26%	43%
<b>Responses (n)</b>	<b>215</b>	<b>125</b>	<b>92</b>

Table 3: In 2021, how many days has your business had to close completely as a result of the pandemic?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
The business did not need to close as a result of the pandemic	16%	20%	14%
Less than 10 days	9%	21%	2%
10-49 days	20%	31%	14%
50 or more days	55%	28%	71%
<b>Responses (n)</b>	<b>237</b>	<b>137</b>	<b>102</b>

## New products or services

Table 4: As a result of the pandemic (since March 2020) has your businesses started offering new delivery or takeaway services?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Yes - and plan for it to stay	18%	26%	14%
Yes - but it's temporary	18%	15%	20%
No	63%	59%	66%
<b>Responses (n)</b>	<b>217</b>	<b>124</b>	<b>95</b>

Table 5: As a result of the pandemic (since March 2020) has your businesses introduced an online booking service?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Yes - and plan for it to stay	29%	34%	25%
Yes - but it's temporary	8%	6%	8%
No	64%	60%	66%
<b>Responses (n)</b>	<b>210</b>	<b>123</b>	<b>88</b>

Table 6: As a result of the pandemic (since March 2020) has your businesses introduced *outdoor dining*?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Yes - and plan for it to stay	14%	18%	11%
Yes - but it's temporary	10%	7%	12%
No	76%	75%	77%
<b>Responses (n)</b>	<b>204</b>	<b>119</b>	<b>87</b>

Table 7: As a result of the pandemic (since March 2020) has your businesses introduced *advanced booking with a no-show/late cancellation fee*?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Yes - and plan for it to stay	20%	14%	24%
Yes - but it's temporary	9%	4%	13%
No	71%	83%	64%
<b>Responses (n)</b>	<b>209</b>	<b>124</b>	<b>87</b>

Table 8: As a result of the pandemic (since March 2020) has your businesses started offering *other digital services*?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Yes - and plan for it to stay	21%	23%	19%
Yes - but it's temporary	8%	1%	12%
No	72%	76%	69%
<b>Responses (n)</b>	<b>183</b>	<b>109</b>	<b>75</b>

Table 9: As a result of the pandemic (since March 2020) has your businesses developed or implemented *new products or services*?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Yes - and plan for it to stay	19%	18%	20%
Yes - but it's temporary	9%	12%	8%
No	71%	69%	73%
<b>Responses (n)</b>	<b>185</b>	<b>110</b>	<b>77</b>

Table 10: As a result of the pandemic (since March 2020) has your businesses introduced *at least one new product or service*?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
No	25%	27%	24%
Yes	75%	73%	76%
<b>Responses (n)</b>	<b>232</b>	<b>133</b>	<b>101</b>

## Financial impacts

Table 11: Is your business incurring additional costs as a direct result of the pandemic? Proportion that have experienced cost increases in **at least one item by more than 10%**

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
No	27%	18%	32%
Yes	73%	82%	68%
<b>Responses (n)</b>	<b>232</b>	<b>133</b>	<b>101</b>

Table 12: Is your business incurring **additional business debt/loan repayments** as a direct result of the pandemic?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Costs increased more than 20%	15%	18%	13%
Costs increased 10-20%	15%	19%	12%
Costs increased less than 10%	16%	18%	16%
No additional costs	54%	45%	60%
<b>Responses (n)</b>	<b>209</b>	<b>121</b>	<b>90</b>

Table 13: Is your business incurring **additional staffing costs** as a direct result of the pandemic?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Costs increased more than 20%	18%	18%	19%
Costs increased 10-20%	21%	31%	16%
Costs increased less than 10%	25%	34%	21%
No additional costs	35%	18%	45%
<b>Responses (n)</b>	<b>214</b>	<b>122</b>	<b>94</b>

Table 14: Is your business incurring **additional event insurance costs** as a direct result of the pandemic?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Costs increased more than 20%	13%	10%	14%
Costs increased 10-20%	15%	26%	8%
Costs increased less than 10%	13%	20%	8%
No additional costs	60%	44%	69%
<b>Responses (n)</b>	<b>197</b>	<b>110</b>	<b>89</b>

Table 15: Is your business incurring **additional public liability/other insurance costs** as a direct result of the pandemic?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Costs increased 10-20%	15%	21%	12%
Costs increased less than 10%	16%	24%	12%
Costs increased more than 20%	14%	12%	16%
No additional costs	54%	43%	61%
<b>Responses (n)</b>	<b>209</b>	<b>121</b>	<b>90</b>

Table 16: Is your business incurring **additional cleaning and hygiene costs** as a direct result of the pandemic?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Costs increased more than 20%	22%	23%	21%
Costs increased 10-20%	35%	43%	30%
Costs increased less than 10%	26%	30%	23%
No additional costs	17%	3%	26%
<b>Responses (n)</b>	<b>222</b>	<b>129</b>	<b>95</b>

Table 17: Is your business incurring **additional supplier costs** as a direct result of the pandemic?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Costs increased more than 20%	16%	19%	14%
Costs increased 10-20%	26%	36%	20%
Costs increased less than 10%	30%	30%	30%
No additional costs	29%	15%	36%
<b>Responses (n)</b>	<b>216</b>	<b>126</b>	<b>92</b>

Table 18: Is your business incurring **additional premises rental costs** as a direct result of the pandemic?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Costs increased more than 20%	8%	6%	9%
Costs increased 10-20%	5%	9%	2%
Costs increased less than 10%	7%	12%	4%
No additional costs	80%	73%	85%
<b>Responses (n)</b>	<b>206</b>	<b>121</b>	<b>87</b>

Table 19: Since the start of the pandemic (March 2020) has your business made **changes to its prices**?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Decreased	9%	8%	10%
Stayed the same	53%	43%	59%
Increased	37%	49%	31%
<b>Responses (n)</b>	<b>214</b>	<b>124</b>	<b>92</b>



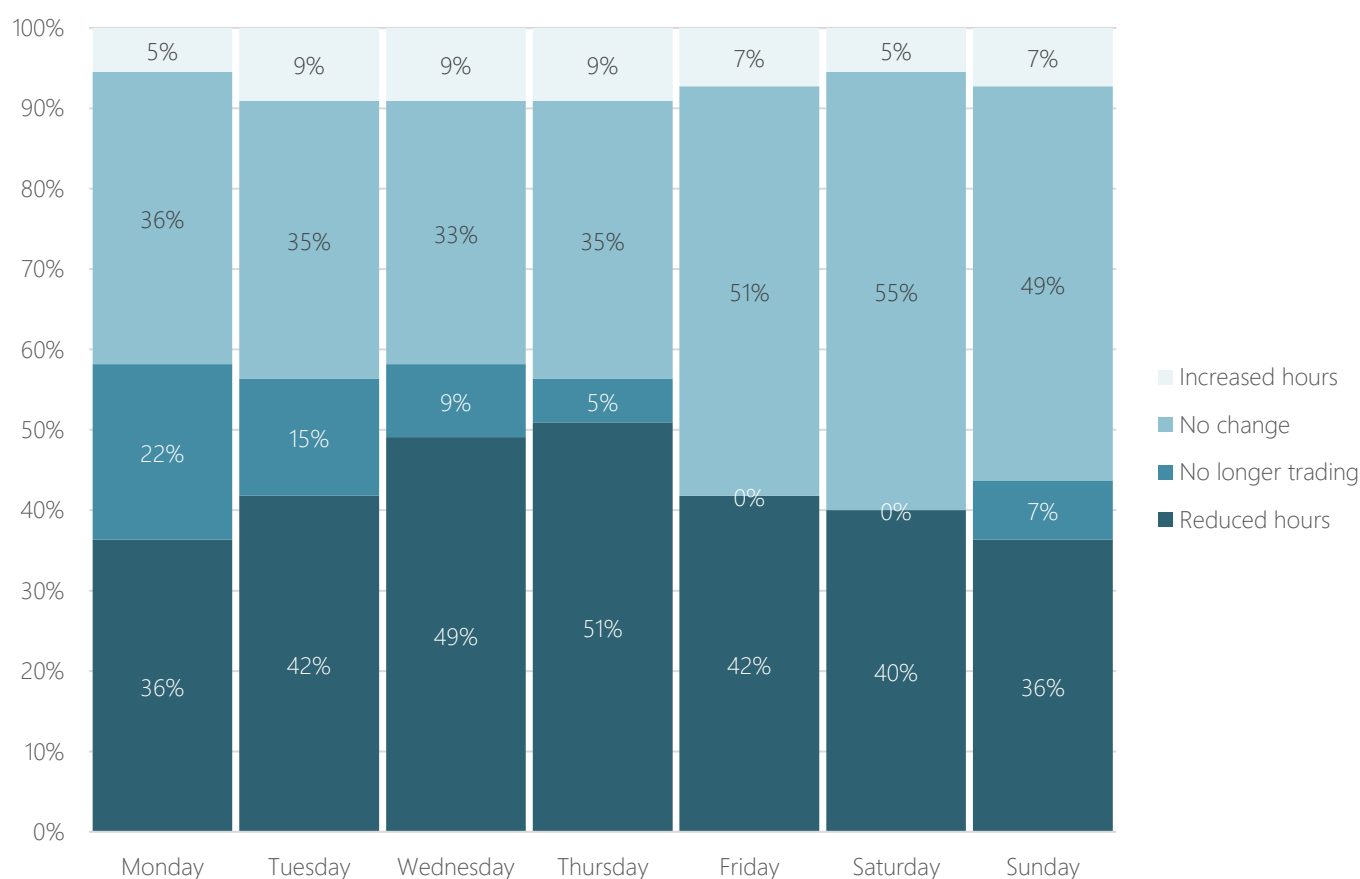
## Changes to activity

Table 20: Are your business' current trading hours different to pre-pandemic trading hours?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
No	55%	48%	59%
Yes	45%	52%	41%
Responses (n)	215	124	93

Figure 1: Current trading hours compared to pre-pandemic trading hours (Australia only)

- **Reduced hours:** the last closing hour of a business reduced by 1 hour or more compared to pre-pandemic
- **No longer trading:** business is no longer trading on the listed day compared to pre-pandemic
- **Increased hours:** the last closing hour is now later by 1 hour or more compared to pre-pandemic
- **No change:** there was no reported change in hours by the business





## Staffing / skills shortages

Table 21: Are you currently experiencing any staffing or skills shortages?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Yes - and this has resulted in reduced days and/or hours of operation	38%	33%	41%
Yes - but we are still able to operate as usual	43%	57%	35%
No	19%	10%	25%
<b>Responses (n)</b>	<b>225</b>	<b>130</b>	<b>97</b>

Table 22: What do you think is driving the staff / skills shortages in your industry? *People leaving the industry / changing job types?*

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
A key driver	61%	60%	61%
Somewhat an issue	35%	38%	33%
Not an issue	4%	2%	6%
<b>Responses (n)</b>	<b>176</b>	<b>108</b>	<b>70</b>

Table 23: What do you think is driving the staff / skills shortages in your industry? *Fewer overseas students / travellers?*

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
A key driver	72%	75%	69%
Somewhat an issue	18%	22%	15%
Not an issue	10%	2%	16%
<b>Responses (n)</b>	<b>174</b>	<b>105</b>	<b>71</b>

Table 24: What do you think is driving the staff / skills shortages in your industry? *Unvaccinated employees?*

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
A key driver	10%	10%	9%
Somewhat an issue	48%	51%	45%
Not an issue	43%	38%	46%
<b>Responses (n)</b>	<b>171</b>	<b>103</b>	<b>70</b>

Table 25: What do you think is driving the staff / skills shortages in your industry? *Staff concerns about COVID safety?*

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
A key driver	6%	5%	7%
Somewhat an issue	28%	40%	19%
Not an issue	66%	55%	73%
<b>Responses (n)</b>	<b>170</b>	<b>103</b>	<b>69</b>

Table 26: What do you think is driving the staff / skills shortages in your industry? Staff concerns about policing COVID protocols?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
A key driver	16%	16%	15%
Somewhat an issue	26%	31%	22%
Not an issue	59%	53%	63%
<b>Responses (n)</b>	<b>172</b>	<b>104</b>	<b>70</b>

Table 27: What do you think is driving the staff / skills shortages in your industry? Quarantining of staff following close contact?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
A key driver	8%	9%	8%
Somewhat an issue	41%	36%	45%
Not an issue	51%	55%	48%
<b>Responses (n)</b>	<b>169</b>	<b>102</b>	<b>69</b>

## COVID interventions

Table 28: How easy are you currently finding keeping up to date with Government COVID-19 safety requirements?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Difficult	26%	24%	27%
Somewhere in between	45%	45%	45%
Easy	29%	31%	28%
<b>Responses (n)</b>	<b>223</b>	<b>128</b>	<b>97</b>

Table 29: How easy are you currently finding implementing COVID-19 safety measures/protocols?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Difficult	17%	24%	13%
Somewhere in between	54%	55%	53%
Easy	29%	21%	34%
<b>Responses (n)</b>	<b>222</b>	<b>128</b>	<b>96</b>

Table 30: Does your business have any plans to use rapid antigen / lateral flow testing?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Yes	8%	6%	10%
No	45%	50%	43%
Not sure	46%	43%	48%
<b>Responses (n)</b>	<b>220</b>	<b>126</b>	<b>96</b>

Table 31: Are you planning future COVID-19 related adaptations to your venue / premise? (e.g. improving ventilation)

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Yes	9%	7%	10%
No	57%	58%	57%
Not sure	34%	34%	33%
Responses (n)	217	125	94

## Looking to the future

Table 32: How do you feel about the future of your business in light of the current pandemic circumstances?

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Extremely optimistic	8%	8%	7%
Somewhat optimistic	40%	38%	40%
Neutral	12%	16%	10%
Somewhat pessimistic	35%	35%	35%
Extremely pessimistic	5%	3%	7%
Responses (n)	211	121	92

Table 33: How do you feel about the future of your business in light of the current pandemic circumstances? (Grouped)

Answer	Australia	Low impact NT/QLD/SA/TAS/WA	High impact ACT/NSW/VIC
Optimistic	47%	46%	48%
Neutral	12%	16%	10%
Pessimistic	41%	38%	42%
Responses (n)	211	121	92

Table 34: What do you think are the top 3 challenges for the future of Australia's night-time industries?

Challenges (coded)	Distribution
Staff shortages and wage concerns	75%
COVID rules / lockdown uncertainties	44%
Footfall / consumer sentiment	26%
Over-regulation	23%
Increasing costs / debt	22%
COVID policing / compliance	20%
Border closures / lack of tourism	14%
Antisocial-behaviour and violence	11%
Noise complaints / restrictions	10%
Transport availability	9%
Reduced activity / turnover	7%
Over-policing	5%
Lack of government support	3%
Homelessness	2%
Temporary events competing against venues	1%
Over-emphasis on sport	1%
Too much competition/over supply	1%
Lack of collaboration esp. between peak bodies and grassroots	1%
Overseas travel once borders open	1%
Negative media coverage	1%
Too much competition / over-supply	1%
Everything closing at the same time	1%
Lack of diversity	1%
Too few venues / under-supply	1%
Lack of state government support for the industry	1%
Inconsistent performance hours	1%
<b>Responses (n)</b>	<b>171</b>

Table 35: What do you think are the top 3 opportunities for the future of Australia's night-time industries?

Opportunities (coded)	Distribution
Normality / eased rules	25%
Tourism / open borders	23%
Deregulation	20%
Live music / arts / events	20%
Increased diversity and quality	18%
Attraction and retention of staff	17%
Domestic / local markets	15%
New technology, innovation and services	15%
Latent demand	15%
Extended opening hours	9%
Improving safety at night	7%
Small business opportunities	6%
Improved transport options	6%
Outdoor offering	6%
Collaboration	5%
Diversification of customer base	5%
Government funding and marketing	4%
Lower compliance / antivaxxers	3%
Reviewing business plans	3%
More venues and sites	3%
Noise management	3%
New pricing	2%
Regional growth	2%
Creating world-class nightlife	1%
People coming to the CBD	1%
Reduced government costs and debt	1%
Climate change / green opportunities	1%
Alcohol advertising	1%
Rapid antigen testing	1%
Hygiene	1%
Revenue growth	1%
Repurposing of space	1%
Improved attitudes to pre-booking	1%
Reduced pokies	1%
Cost of living	1%
<b>Responses (n)</b>	<b>137</b>

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