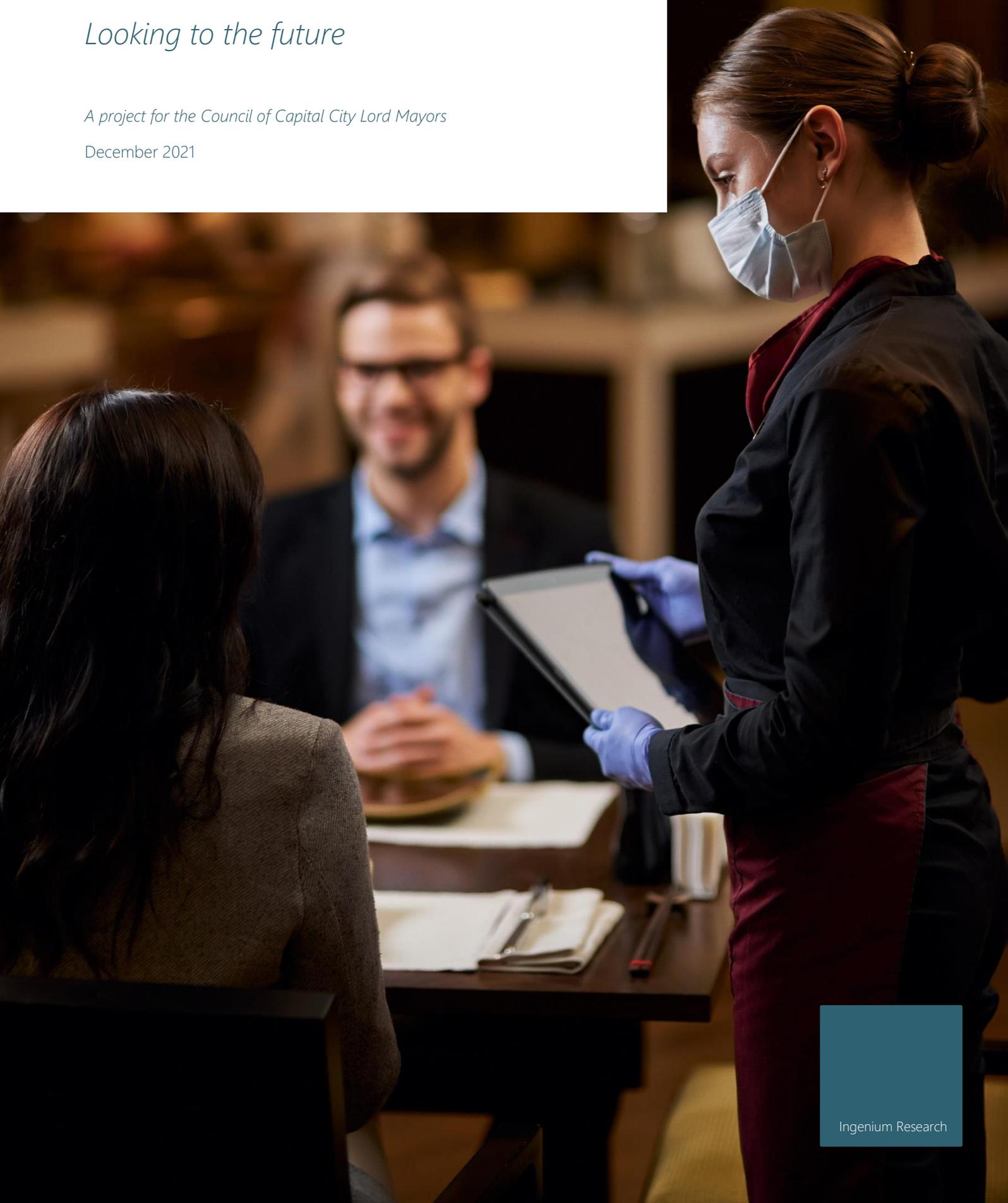


# The Australian Night Time Economy

## *Looking to the future*

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

December 2021



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### Document Information

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*This report contains findings of the first Australian Night Time Industries Survey. The survey ran between the 18th and 30th of 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 reflect the distribution of entity population groupings.*

*Please see the supplementary appendices report for a detailed breakdown of survey findings and references.*

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# Key Findings

## Challenges and opportunities



### Pandemic uncertainty

Businesses continue to experience the impacts of the pandemic, with the identification of the Omicron variant and potential for future lockdowns creating uncertainty. The provision of clear and timely information, along with certainty of support has been noted as important by businesses.



### City footfall and consumer behaviour

Hybrid working is expected to create long lasting change within our cities, including reduced footfall and public transport use and shifts in activity by day of the week and time of the day. This, alongside new customer trends, is creating challenges for night time businesses. A range of strategies should be adopted to orchestrate a return to the city, with nightlife businesses acting as key stakeholders in achieving this.

#### Key opportunities:

- Diversify the city's offering and attract new audiences through experiences and events (p.11)
- Support live music and the arts, advocating for state/territory event insurance schemes (p.10)
- Investigate the potential for implementing city loyalty programs, with the possibility of incorporating gamification techniques that encourage repeat visits to the city (p.11)
- Further promote COVID-safety measures on public transport to encourage increased use, and consider flexible pricing and timetabling models (p.12)
- Invest in infrastructure to make cities, attractive, globally recognisable and safe at night (p.12).



### Staffing and skills

Staff and skills shortages are currently the most common challenge faced by night time businesses. The return of overseas students and travellers will somewhat help to alleviate this, but there is an opportunity for government to support a review of casualisation, pay and working conditions. Investment in the development of career pathways and training of the workforce could also strengthen the underlying quality and diversity of night time services.

#### Key opportunities:

- Further investigate employment challenges within the sector and ways in which government can support businesses to improve employee conditions (p.9).



### Planning and regulation

Local, state/territory, and national governments acted quickly to implement new schemes and adapt regulations during the pandemic. The retention of these interventions and flexibility of regulation offer the opportunity to create a lasting legacy. Many businesses surveyed have called for further relaxation of regulations to support entrepreneurial behaviour.

#### Key opportunities:

- Ensure planning policies take the development of the night time economies into consideration, including noise management and balancing the needs of residents and businesses (p.12)
- Consider the long-term retention of, and support for, outdoor dining (p.12)
- Create avenues for businesses to collaborate with governments, to share ideas and identify further challenges and opportunities (p.12).



# Introduction

The report [Measuring the Australian Night Time Economy 2019-20](#) highlighted the devastating impact of the COVID-19 pandemic on the Australian night time economy during the first three months to June 2020. Since then, the night time economy (food, drink and entertainment) has experienced a rollercoaster of challenges, including snap lockdowns and changing trading conditions.

High rates of vaccination across Australia has provided a sense of optimism and a clear opportunity to move forward. On 6 August 2021, all states and territories agreed to a [National Plan](#) to transition Australia's COVID-19 response. The National Plan states that once 80% of Australians are double vaccinated there will be minimal domestic restrictions in place. At the time of writing, Australia has surpassed this milestone. All states and territories expected to reach a vaccination rate of 90%+ (age 16+) by [mid-February 2022](#).

Over the past eighteen months, social and economic patterns have been in a state of constant flux, with rules and restrictions often changing within days or hours in response to the identification of new COVID cases. The uncertain environment led governments, businesses, and individuals to react to changing pandemic contexts, instead of proactively planning change.

The pandemic generated a greater awareness and acknowledgement of the importance of social contact and the role that our night time industries play in this.

There remains a level of uncertainty that cannot be ignored (e.g. When do we stop testing? How long will measures stay in place?). Australia's success in passing the milestones laid out in the National Plan, however, provide a level of confidence that offers its capital cities the opportunity to strategically plan for the future of the night time economy using examples from other countries and cities to learn valuable lessons from reopening.

The strong and resilient recovery of Australia's urban night time economies is a key lever in attracting people back to city centres. This will be dependent on partnership and

collaboration between industry and government to develop positive night time governance solutions.

To inform this process, an industry survey was conducted from 18-30 November 2021, collecting the perspectives of more than 250 night time businesses across Australia. This report collates these findings to identify key short, medium, and long term challenges that the [consumer](#), the [business](#), and the [city](#) may face – and the potential solutions and opportunities that may assist in putting the sector in the best position possible as we look to the future.

## Case study: Ireland's experience

By early September 2021, Ireland had successfully double [vaccinated](#) more than 90% of its adult population (18+) and looked to have effectively made the transition from pandemic to endemic.

Despite this success, in late October and early November 2021 the country began to experience a dramatic increase in cases and hospitalisations. By mid-November the Government had [reinstated several measures](#), including,

- Working from home where possible
- Proof of immunity to attend cinemas or theatres
- Reducing trading hours of pubs, restaurants, nightclubs, and licenced venues to midnight.
- Limits on table sizes in restaurants / pubs.

Other recommendations included a review of building ventilation as the country moves towards winter and socialising moves indoors, a series of targeted communications around the correct usage of masks and compliance and booster vaccinations for those aged 50+. As of 7 December, [additional rules](#) include the closure of nightclubs and table-service only in pubs and restaurants. In response to this, the Government is providing targeted [financial support](#) for the hospitality sector.

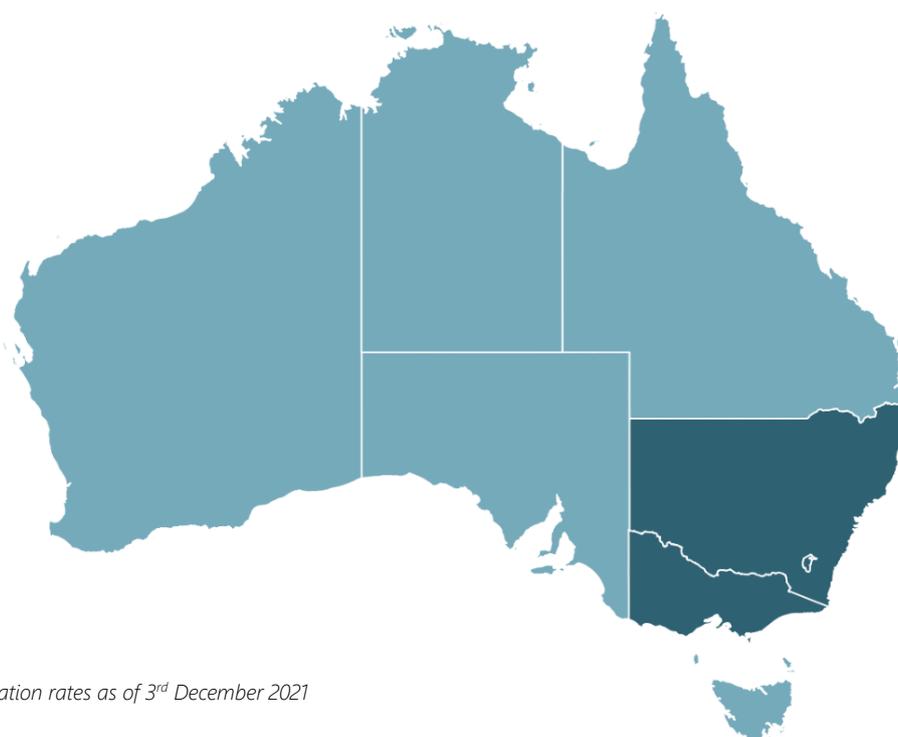
Experiences such as this highlight that while Australia has made great strides in its vaccination efforts, there are likely to be further trials ahead with COVID-19 – particularly as we move into winter.

The states and territories of Australia have all experienced the pandemic very differently, with some areas remaining relatively untouched by the virus and others experiencing large outbreaks leading to substantial periods of lockdown and restrictions. A high-level overview of these experiences is provided below through a lens of cases, deaths, vaccination rates and mobility.

Businesses surveyed in areas with high community transmission (>2,000 cases) were much more likely to have closed for more than 50 days (71%) compared to areas with lower caseloads (28%). Perhaps associated with this, 84% of businesses in high case load areas reported declines in business activity or sales turnover, compared to 51% in lower caseload areas. Based on this, it is likely that each area will encounter different experiences and challenges as the virus moves from pandemic to endemic within each jurisdiction

Case load: <b>Low</b>	<b>WA</b>	Case load: <b>Low</b>	<b>NT</b>	Case load: <b>Low</b>	<b>QLD</b>	Case load: <b>High</b>	<b>NSW</b>
Community cases	115	Community cases	82	Community cases	590	Community cases	78,726
Deaths	9	Deaths	0	Deaths	7	Deaths	628
Fully vaccinated 16+	77%	Fully vaccinated 16+	78%	Fully vaccinated 16+	78%	Fully vaccinated 16+	93%

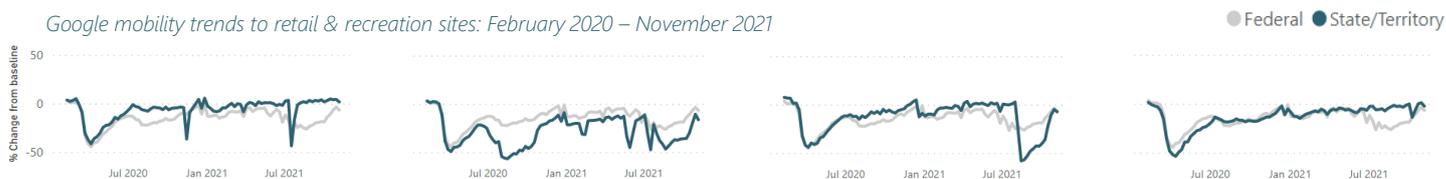
Google mobility trends to retail & recreation sites: February 2020 – November 2021



Cases, deaths, and vaccination rates as of 3<sup>rd</sup> December 2021

Case load: <b>Low</b>	<b>SA</b>	Case load: <b>High</b>	<b>VIC</b>	Case load: <b>High</b>	<b>ACT</b>	Case load: <b>Low</b>	<b>TAS</b>
Community cases	261	Community cases	124,222	Community cases	2,048	Community cases	154
Deaths	4	Deaths	1,357	Deaths	14	Deaths	13
Fully vaccinated 16+	82%	Fully vaccinated 16+	91%	Fully vaccinated 16+	99%	Fully vaccinated 16+	88%

Google mobility trends to retail & recreation sites: February 2020 – November 2021





**OPEN**

Welcome

# The Consumer

Depending on the state or territory, consumers of night time economy services have had vastly different experiences over the past 18 to 24 months. In Western Australia or Northern Territory consumers may not have seen many differences, when compared to patrons in New South Wales and Victoria, who have effectively been locked out of the night time sector for months on end. The changes in consumer behaviour over this period are important to consider as Australia re-opens.

## Consumer sentiment

[Household consumption](#) has been forecast to rebound during the December 2021 and March 2022 quarters, as vaccination targets in the National Plan are met and pandemic restrictions ease. This [latent demand](#) is expected to result in increased domestic spend, as Australians make up for lost time and seek out experiences they have missed over the past eighteen months. Economists have estimated that by late 2021, Australians' [savings will be \\$230bn higher](#) than normal. In June 2021, 27% of Australians expected their [spending would increase](#) over the following twelve months, especially among those with lower household incomes. Almost one third (32%) planned to use savings to spend on travel over the next year and [travel sentiment](#) is improving – a key component of the night time industries.

*"There [are] a huge number of young people coming of age who missed out on their night lives when they hit 18 years of age. There [are] a lot of customers there waiting to experience Australian nightlife"*

(Pub, bar, tavern, November 2021).

It is recognised that COVID-19 can impact [mental health](#) and wellbeing. For those states particularly impacted by long lockdowns, there is likely to be an impact on the mental health of many consumers in the immediate to short term, with some feeling anxious about returning to normality. This may also be a factor in states and territories that have been less affected by the pandemic, as these states and territories transition to living with increasing case numbers. In either case, it will be important to be mindful of those in society that are more [vulnerable](#) to the virus such as the elderly, the unvaccinated, Indigenous Australians, people with disability or illness as well as the homeless. There is the potential that those in these groups may move away from traditional night time experiences, instead opting for social get-togethers within closed circles.

## Accelerated consumer trends

The advent of the pandemic and stay at home orders has led to the acceleration of many trends that were already in motion. For example, the increasing popularity of [meal delivery services](#) is a trend accelerated as a direct result of the pandemic. For many businesses (37% of those surveyed), the introduction of takeaway and/or delivery services was their only option while pandemic restrictions were in place. Whether this trend continues remains to be seen, with half of businesses stating that these new services were here to stay, and the other half stating they intended for them to be only temporary.

Outside of delivery services, many businesses have pivoted their operating models during COVID-19 to adapt and survive. Of those that had introduced new products or services, the most common were moving services online (e.g. [live streamed events](#)), the introduction of at-table ordering (e.g. via QR code) and development of entirely new product lines (e.g. packaged products).

Between 2019 and 2021, Australians substantially increased spending on [home entertainment](#) equipment (+44%) and [video-on-demand](#) services (+56%) such as Netflix, Stan and Amazon Prime. Investment in these services, combined with the potential hesitancy on returning to normal, could present a challenge for the sector in encouraging individuals to reengage directly with the night time economy. This is explored later in *The City* section, however, positioning our Central Business Districts (CBDs) towards Central Entertainment or Experience Districts could assist. CBDs could become a greater focus of new experiences (e.g. board game cafes, permanent lighting displays, public art) or events that attract new audiences and move beyond the traditional nightlife focus, thereby expediting an existing trend to diversify the offer and move beyond the focus on alcohol-centric business models.

# The Business

Businesses across Australia have been impacted by the pandemic, with the hospitality and night time industries (food, drink and entertainment) being particularly hard hit. [Governments quickly mobilised](#) to support the sector, enabling initiatives such as outdoor dining to allow businesses to continue to trade within restricted density limits. The pandemic will leave a lasting impact on these businesses and the ways in which they trade going forward.

## Employment challenges

While the night time industries experienced a substantial [loss in jobs](#) during the pandemic, the most commonly cited challenge now faced is [skills and staffing shortages](#), with 81% of night time business surveyed experiencing this issue. For 38% of these businesses, this has led to reduced trading days or hours of operation, particularly from Monday to Thursday. Related to this, almost 40% of businesses stated that their staffing costs had increased by more than 10%.

*"Many hospitality operators are not opening at all early week or to capacity at weekends as they simply do not have staff to operate. The situation has morphed into a 'bidding' war with larger groups poaching key staff. Whilst the opening of international borders will resolve some of the issues, shortages, especially in trained chefs was evident prior to the pandemic and is now at an all time critical point"*  
(Advocacy body, November 2021)

The two primary reasons for current staffing shortages cited by surveyed businesses were fewer overseas students / travellers and [people leaving the industry](#) - reasons for which could include (among others) a desire for home working or pandemic fears. The reopening of borders and the staged return of [international students](#), should help to alleviate this issue in 2022. Staff shortages have also shone a spotlight on the [employment conditions of hospitality workers](#), with many experiencing low pay, wage theft, a lack of career development opportunities and low job security through casualisation.

## Canada: hospitality staffing shortages

Businesses in many countries are finding it difficult to fill staff vacancies within hospitality. The [food service sector](#) in Canada is struggling to fill the 130,000 hospitality vacancies needed to return to pre-pandemic levels of employment.

## Pandemic safety measures

The pandemic has brought many new rules and regulations for businesses. The fast-changing pace of rules can be challenging to keep up with, especially for businesses operating in multiple jurisdictions. Just 29% of surveyed businesses found it easy to keep up to date with COVID-19 requirements, while 26% found it difficult. Those finding it challenging suggested a federal government website or resource covering all states and territories would be helpful. While keeping up to date proved challenging, businesses generally found it easier to implement the requirements.

Australia's [National Plan](#) ends with a final post-vaccination phase, with [no recovery phase](#) to address economic impacts and to rebuild resilience. A related concern is pandemic uncertainty, with less than half (47%) of surveyed businesses feeling optimistic about the future in light of current pandemic circumstances.

## Netherlands: High vaccination, partial lockdown

On November 13<sup>th</sup> 2021 a [partial lockdown](#) was reintroduced after [hospitalisations increased](#) to 200+ per day, despite a vaccination rate at 83% among people aged 12+. The lockdown enforced [hospitality establishments](#) to close between 8pm and 6am every night. On 26 November, further restrictions were introduced including [almost all businesses closing between 5pm and 5am](#).

Safe Work Australia provide pandemic related workplace guidance for specific industries, including [hospitality](#) and [live entertainment](#). Guidance is also provided on the use of [heating, ventilation and air conditioning](#) systems during COVID-19. In March 2021, the World Health Organisation published a roadmap to improve [indoor ventilation](#) in the context of COVID-19. Despite this, only 9% of businesses surveyed said they are planning further adaptations to their venues, with some alluding to ventilation improvements.

On 1 November, the Therapeutic Goods Administration approved [rapid antigen testing](#) for supply in Australia, although only 8% of night time businesses surveyed plan to – or are currently using – the tests as part of their business model, with some citing the cost as prohibitive.

## UK: Free rapid antigen testing

In March 2021 the UK Government began offering [free rapid antigen tests to all businesses](#). While these tests can no [longer be ordered](#) by businesses, they remain free of charge to [members of the public](#).

Australia has adopted a proof of [COVID-19 vaccination certification](#) scheme, which has been used as a “vaccine passport” to allow access to certain venues and services while waiting for vaccination rates to increase.

## Germany: Vaccinated economy system

On 2 December 2021 in response to the fourth wave, and with an aim of reducing the number of infections and relieving the burden on the healthcare system, the German Government introduced a range of new rules based on [vaccination status](#), including limiting access of unvaccinated people to non-essential retail, cultural and leisure venues.

Consumer safety remains high on the agenda, with many businesses highlighting its importance for both pandemic safety measures and managing antisocial behaviour. Some businesses reported challenges with policing vaccination status.

## Business financial impact

Night time businesses were [particularly impacted by the pandemic](#). Of the businesses surveyed as part of this research, 72% stated that their activity or sales turnover was lower than an equivalent time pre-pandemic, with 37% of businesses indicating they were experiencing a decline in activity of more than 50%.

Many businesses (75% of those surveyed) have introduced at least one new service or product to pivot due to

changing conditions. One feature that many businesses (29% of those surveyed) have introduced is a no-show or late cancellation fee with 69% of these businesses indicating they intended to retain the policy going forward.

In addition to reduced activity, businesses are also incurring additional costs as a direct result of the pandemic. The cost of cleaning and hygiene materials increased by more than 10% for nearly 57% of businesses surveyed. While 41% of businesses noted that supplier costs had increased by more than 10%, an encouraging 80% of businesses stated they had seen no increase in premises rental costs.

Nearly 43% of businesses surveyed had experienced increases in insurance costs – particularly event insurance. Many businesses cite live music and performing arts as a key opportunity for the sector, but pandemic uncertainty has resulted in insurance being more expensive or, in some cases, unobtainable. The [Live Performance Federal Insurance Guarantee Fund Bill](#), which aimed to provide a federal fund to support the sector, was recently tabled in parliament. Federal Government recommended that the [bill not be passed](#), indicating that the issue should be managed by states and territories and citing programs in [Western Australia](#) and [Tasmania](#). Additionally, the [Victorian Government](#) has announced the first Australian COVID-19 event insurance product. This is likely to be a continuing issue for the industry in other states and territories.

The decreased activity combined with rising costs, are likely key drivers behind 37% of businesses surveyed increasing prices since the onset of the pandemic. As restrictions lift in jurisdictions with high caseloads, many businesses will be looking to their local councils for support in how to entice patrons back to the city, while in jurisdictions with fewer cases it will be more about applying learnings on safe trading as COVID-19 enters the community.

Almost half (47%) of businesses surveyed feel optimistic about the future in the current pandemic circumstances, with perceived opportunities including a return to normality and tourism, the potential to broaden the diversity of the customer base and an extension of opening hours.

## Key financial survey findings (Proportion of businesses)

55%

closed for over 50 days  
(as a direct result of the pandemic)

72%

with lower activity / sales turnover  
(than a similar time pre-pandemic)

37%

experiencing 50%+ decline in activity/sales turnover  
(due to the pandemic)

73%

experiencing 10%+ additional costs  
(as a direct result of the pandemic)

46%

incurring additional debt or loan repayments  
(due to the pandemic)

37%

Increased prices  
(since the onset of the pandemic)

# The City

Central Business Districts (CBDs) across Australia have experienced substantial changes following the onset of the pandemic. With many people now working from home, office occupancy rates and public transport use across the states and territories remain below pre-pandemic levels. While governments across Australia quickly mobilised to support their night time industries, the nature of CBDs are evolving, and Australia's cities are actively developing approaches to entice patrons back.

## City utilisation

The estimated proportion of Australians [working from home](#) increased from just 8% in 2019 to 40% in 2020, and 38% in 2021. It is anticipated that the amount of home, flexible and hybrid working is likely to remain substantially higher than pre-pandemic levels. This will impact on economic activity within city centres, dispersing some activity to the [suburbs](#) and [regional](#) locations.

It has been suggested that there could be a shift away from shopping and office use towards more [cultural and civic uses](#). Others have called for a reimagining of cities from Central Business Districts to [Central Entertainment, Experience or Social Districts](#).

In October 2021, [office occupancy](#) rates in Australia's capital cities remained below pre-pandemic levels, ranging from 92% in Hobart and Darwin to just 4% and 7% in Melbourne and Canberra respectively. A November survey found that occupancy rates were improving but 62% of office owners believe that any major improvements in occupancy are [unlikely to occur in the next three months](#). Similarly, there has been a rise in empty shopfronts, with [retail vacancy](#) rates in Australia's capital cities during the first half of 2021 ranging from 8% in Sydney to 27% in Perth. It is possible that these trends could lead to a long-term fall in demand for commercial property in CBDs.

Cities are experiencing a shift in activity by [day of week](#). For example, in January to November 2021, [visits to workplaces](#) in Australia's capital cities were down on average 20% on Mondays and 15% on Wednesdays.

An interdependency exists between the number of office workers, retail, and the "sandwich" (lunchtime), "twilight" (after work) and night time economies. Therefore, it will be important to attract people back at all times of the day by reminding them of all the things unique to city centres and

the potential that is created through face-to-face collaboration and social interaction.

Schemes such as [MyDarwin](#) discounts, [NSW's Dine & Discover](#), and [Melbourne Money](#) have helped alleviate this in the immediate term. A longer-term solution could build *gamification* into these concepts (e.g. maintain a streak of mid-week visits, visit all areas of the city within a month) as an innovative way to encourage city loyalty or repeat visits.

### Scotland: Miconex loyalty and gift cards

Miconex has been operating city-wide gift card programs in the UK since 2010. The company also runs place-based [loyalty programs](#) that reward customers for spending money at registered businesses. In July 2021 the [Scottish Government backed the rollout](#) of Miconex's "Scotland Loves Local" gift card to all 32 local government areas to support recovery by encouraging people to spend locally

There is also the potential that the times people commute to work could change beyond the 9am-5pm, with some starting work earlier or finishing later to avoid peak commuting periods. These trends could impact when consumers seek night time economy services.

### London: Attracting people back to the city

In 2020, the Mayor of London published a report on COVID-19 and the [recovery of life at night](#) and in May 2021, a [domestic tourism](#) campaign was announced. This included [Let's Do London](#); a scheme developed in partnership with hospitality, culture, and retail to entice Londoners back to the city through special events. London First (a group representing London's leading employers) is calling for an [extension of funding](#) for this scheme.

## Transport and travel

As of 1 December 2021, the number of people using [public transport](#) in Australia is 9% lower than at pre-pandemic levels, while the number driving is 31% higher. This data indicates that the reduced use of public transport is a greater issue for cities that have endured longer lockdowns and case numbers (Melbourne (-14%) and Sydney (-15%)), when compared to cities with a lesser pandemic impact (Perth +2%, Brisbane -2%).

Drivers of changes in behaviours are likely to include pandemic fears, irregular commuting patterns (making annual travel passes less economically viable) and, in some locations reduced services/timetabling. This is an important issue in the context of climate change. It is also an important consideration for Australian cities working towards the [30-minute city concept](#).

The Productivity Commission are currently researching [public transport pricing](#), which will consider the impact of the pandemic, while Infrastructure Victoria has published research about the [post-pandemic commute](#). Research conducted by mobility service Moovit found that respect for social distancing, provision of hand sanitizer and increased frequency/less crowded vehicles were the highest rated factors to [encourage public transport use](#) during the pandemic. Meanwhile, the Property Council has proposed three months of [free public transport](#), off peak fares and the inclusion of public transport in pre-purchased event tickets to revitalise Melbourne's CBD. Flexible office work times may also support the alleviation of this issue.

### Europe: A new era for public transport

In September 2021, one of Europe's leading public transport companies, Arriva, released a report on the [future of public transport](#), in recognition that the substantial changes to usage experienced during COVID, were likely to remain. Innovative solutions included real-time crowding information, flexible ticketing, multi-modal transport offers and revisions to routes to reflect updated passenger demand – in addition to more technological solutions such as demand responsive travel.

## City planning and regulation

It will be vital that [planning and zoning policy](#) enables responsive change and flexible uses for the repurposing of commercial space. While the underlying future of urban retail is uncertain due to the rise in e-commerce, there will likely be demand for [collaborative and hybrid](#) working spaces. Another existing issue that may be exacerbated by changes to city use is [noise complaints](#), with many night time businesses surveyed citing this as a challenge.

Outdoor dining and events and the establishment of parklets helped many night time economy businesses to survive during the pandemic. After grant funding, outdoor dining was the most commonly cited government initiative that hospitality businesses hope will be retained. Of the 38% of food and drink venues surveyed that introduced outdoor dining, the majority (56%) plan for it to stay.

Access to [blue, green and recreational spaces](#) that are well maintained with appropriate facilities (and lighting, where appropriate) can enhance people's quality of life and will remain an important asset as we emerge from the pandemic. Investing in infrastructure to make cities safe, attractive, and globally recognisable at night (for example, via permanent creative lighting displays) will be important for long term success. This is particularly relevant in the growing 'experience' economy and the demand for photogenic and 'Instagrammable' scenery.

Many night time businesses cite regulation as a challenge, however, increased [flexibility](#) by local, state and national government enabled necessary quick adaptations and trials at the height of the pandemic. An opportunity exists for these to become permanent, leaving a lasting legacy, for example, the NSW Government has consulted on proposals to [retain temporary measures and improve planning](#) in relation to outdoor dining, artisan food and drink premises, events, and small live music or arts venues.

Localism and support for small businesses rallied during the pandemic. Many businesses cited this as an opportunity, alongside the potential for increased collaboration among communities of "likeminded businesses" and governments, such as in [Sydney](#), [Melbourne](#) and [New South Wales](#).

*"By continuing to address and remove the barriers to entrepreneurship I believe Australia could be positioned as having the best nightlife in the world. We have all the talent in this country, with support local and state government can have many engines driving the economy through a diverse and rich night-time industries"* (Events business, November 2021)

