

# Measuring the Australian Night Time Economy 2020-21

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

September 2022



Ingenium Research

### Document Information

Project Reference Number	P22-03-02
Title	Measuring the Australian Night Time Economy 2020-21
Last update	19/09/22
Name of Authors	Anna Edwards, Andrew License
Reviewer	Terry Bevan
Document Status	Public
Approval Status	Final

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### 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 (2020-21). For further details about the methodology and data sources, please see the Appendix.*

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19 September 2022



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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). <b>Elements of charts and infographics relating to employment throughout this report are coloured red.</b>
Establishment(s)	Actively trading business(es) recorded in the Australian Bureau of Statistics Business Register (ABSBR) as at 30 <sup>th</sup> June in each reporting year. <b>Elements of charts and infographics relating to establishments throughout this report are coloured blue.</b>
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. <b>The focus of this report is the Core NTE.</b>
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). <b>Elements of charts and infographics relating to turnover throughout this report are coloured green.</b>
Sector	Description
Core NTE	The activities that provide primary establishment services to leisure users – mainly 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 (p46).

# Key findings for 2020/21



## Employment rebounded but remained below pre-pandemic

Following devastating employment losses in the first three months of the pandemic to June 2020 (-20%), employment in Australia's Core NTE employment had rebounded by June 2021 (+18%) to more than 1.05m workers. Despite the rebound, employment remained 7% below pre-pandemic levels, with 73k fewer positions – pushing Core NTE employment back to levels recorded in 2016.



## Sales turnover recovery slower in Entertainment

In 2020/21, Core NTE sales turnover increased to \$133bn, but remained \$6.2bn (-5%) below the 2019/20 pre-pandemic baseline – in line with 2017/18 levels. This was driven by the Entertainment sub-sector, which remained -15% below the 2018/19 pre-pandemic baseline, likely due to the close-contact nature of many of the sub-sector's activities. The Drink sub-sector, surpassed the baseline, while the Food sub-sector had almost returned to pre-pandemic levels.



## Record establishment growth

Despite the pandemic uncertainty, in the 2020/21 financial year, Australia's Core NTE recorded the highest percentage growth (+8%) in establishments since records began in 2009. The sector gained 9,590 businesses, bringing the total to 123,300. Potential reasons for this include strong consumer demand as restrictions lifted and entrepreneurs acting in response to government stimulus packages<sup>1</sup>.



## VIC and NSW had the greatest establishment growth

New South Wales (+11%) and Victoria (+9%) had the greatest percentage and absolute growth in Core NTE establishments in 2020/21. The strong Victorian state level growth was not matched in Melbourne (+4%), with most of Victoria's growth occurring within the wider Greater Melbourne area, outside of the capital city.



## Continuing shift from Drink to Entertainment and Food

In 2020/21 the Food sub-sector gained 6,796 businesses (+10%), driven by *Cafes and Restaurants* (+6,147 / +14%). The Entertainment sub-sector also had noteworthy establishment growth (+2,395 / +7%), particularly within the *Creative and Performing Arts* (+1,054 / +7%), *Sports and Physical Recreation* (+955 / +10%) and *Brothel Keeping and Prostitution* (+62 / +20%) industries. Drink establishments rose at a slower rate (+399 / +5%) continuing an existing trend of a shift away from Drink towards a more diverse range of night time activities.

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<sup>1</sup> In 2021, Australia's business community as a whole had fewer business exits, a higher business entry rate, an increase in businesses shifting from non-employing to employing, and a rise in updates to registered industry classifications (ANZSICs). Several factors could have driven this, including innovation, the return of consumer demand and businesses adapting to become eligible for, or benefit from government stimulus packages (see *Data sources* in the appendix for further information)..







# Introduction

Last year's report set out the initial devastating impacts of COVID-19 on Australia's night time economy during the first three months of the pandemic, to June 2020. Since then, much has changed for the night time economy – and Australia as a whole – as society transitions towards 'COVID normal'.

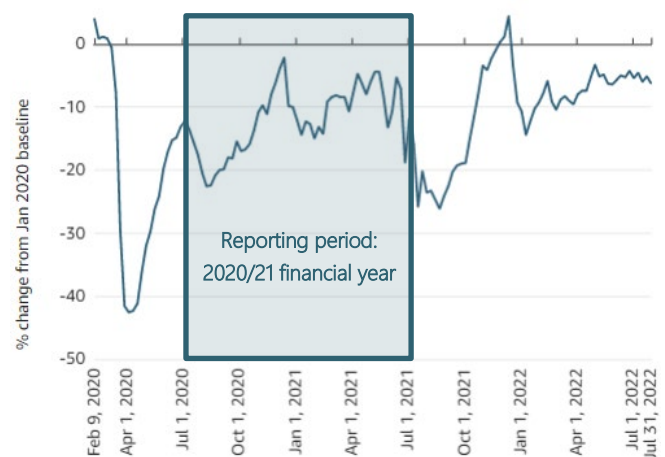
While lockdowns look to be a thing of the past, the sector still faces uncertainty and challenges such as ongoing staff shortages and cost of living rises. Additionally, night time economy businesses continue to adapt to changes to consumer demand caused by increased working flexibility, with recent data indicating that there has been a stall in office workers returning to Australia's CBDs<sup>1</sup>.

While there have been challenges for the sector across Australian cities, many councils have recognised the importance of their night time economies in reactivating their CBDs. The opportunity has been taken to develop new strategies and action plans to support night time economy businesses going forward. Cities have also been keen to develop partnerships between the business community and government to foster successful night time initiatives. All these initiatives put Australia's night time economy in a stronger position for the future – a welcome outcome following the hardships experienced by many businesses over the last couple of years.

This report analyses data for the 2020/21 financial year, at a time when Australia was entering its third wave of the pandemic and the Delta variant was beginning to gain traction. Borders remained closed to international tourists, but pandemic restrictions

were easing in many cities, and the race to vaccinate the Australian population was underway. In many instances, the steep falls in employment and sales observed during the first three months had begun to be reversed and, as explored in the [Looking to the Future report](#), there was a general sense of optimism. This is reflected in Figure 1, where [Google Mobility](#) data trends highlight that visits to retail and recreation premises had returned to 10% less than the pre-pandemic baseline. That being said, the advent of the Omicron variant later in 2021 led to further challenges for the sector (also visible in Figure 1).

*Figure 1: Australian retail and recreation mobility*



This year's report begins by investigating the impacts to 2020/21 on Australia as a whole, before an analysis of state and territory trends. This is followed by a review of trends and local government initiatives in CCCLM member cities.

The report offers continuity of evidence to support the development of Australia's night time economy during the continued challenges caused by the COVID-19 pandemic.

# The NTE in Australia

Core NTE businesses play an important part in Australia's enviable lifestyle culture. They make a strong and growing contribution towards Australia's economy in the jobs they provide, and the sales turnover generated.

In June 2021, Australia's Core NTE comprised 123,316 **establishments**. Most of these businesses belong to the Food sub-sector (63%), followed by Entertainment (30%) and Drink (7%). The distribution across these three sub-sectors has continued a trend towards more Food and Entertainment and fewer Drink establishments. This trend has been driven increases in *Sports and Physical Recreation Activities* and *Creative and Performing Arts Activities* businesses.

Despite the ongoing pandemic challenges, the Australian Core NTE gained 9,590 establishments in 2020/21 (+8%) – the strongest growth since records began (Figure 3). Most of this growth was in the Food sub-sector (+10%), driven by the addition of 6,147 businesses in Australia's *Cafes and Restaurants* industry (+14%). The Entertainment (+7%) and Drink (+5%) sub-sectors also gained new businesses.

After a fall of -9% between 2018/19 and 2019/20, Australia's Core NTE **sales turnover** rose 4%, growing from \$127.6bn in 2019/20 to \$133.2bn in the 2020/21 financial year. Sales turnover remained \$6.2bn below the 2019/20 pre-pandemic baseline, demonstrating that recovery was still incomplete.

Similarly, after a fall of -20% between June 2019 and June 2020, **employment** as of June 2021 had rebounded by 18%. This, however, was -7% below the pre-pandemic June 2019 baseline - equating to 72,655 fewer jobs in the sector - as visualised by the red line in Figure 3. The industry with the greatest number of job losses was *Takeaway Food Services*, which had 42,375 fewer employees in June 2021 than it did in June 2019.




Measure	Core NTE 20/21 & Change from 19/20	% Total Economy
 Establishments	123,316 +8.4%	5.1%
 Employment	1,051,650 +17.5%	8.0%
 Sales Turnover	\$133.2bn +4.4%	3.3%

Figure 2: Indexed % change (2011 = 1.0) in Core NTE metrics

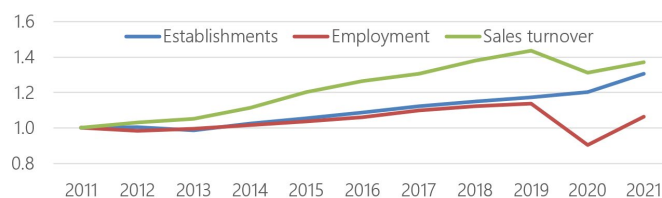
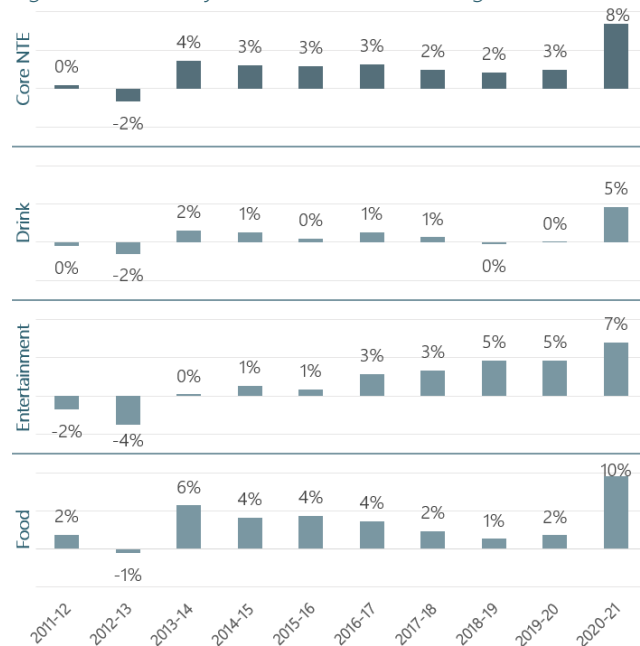


Figure 3: Year on year establishment change 2011 to 2021






## Sub-sectoral performance

Australia's Core NTE gained a substantial number of **Food** establishments (6,796 / +10%) in 2020/21. After a considerable fall in employment in 2019/20 (-18%), the number of employees in this sub-sector partially recovered but remained -5% below the pre-pandemic 2018/19 baseline. Sales turnover in this sub-sector made a partial recovery. Interestingly, 2020/21 sales turnover growth was strongest among establishments classified as *Cafes and Restaurants* (+19%), while turnover in *Takeaway Food Services* declined -6%. An explanation for this may be the rise of the gig economy, as well as food delivery services classified as belonging to the *Courier Pick-up and Delivery Services* industry.

The **Entertainment** sub-sector also experienced strong growth in establishments (+7%) in 2020/21. Sales turnover continued to fall - likely a reflection of the slower recovery of close-contact activities. After a fall of -9% in 2019/20, it fell by another -7% in the 2020/2021 financial year. In 2020/21, the fall in turnover was particularly evident within *Creative and Performing Arts Activities* (-22%). To put this into perspective, sales turnover in this industry in 2019/20 was \$8.4bn, while in 2020/21, this had fallen to \$5.7bn; a loss of \$2.7bn. After large losses in 2019/20 (-29%), some employment in the sub-sector was regained by June 2021, suggesting preparation for returning demand, but remained 9% below June 2019 levels.

The **Drink** sub-sector also experienced growth in establishment numbers (+4.6%) in 2020/21 after a long period of stagnation. This was driven by growth in the number of *Pubs, Taverns and Bars* (+6%), as opposed to *Liquor Retailing* (+1.5%). Drink's employment and turnover increased in 2020/21, with particularly strong growth in *Liquor Retailing* turnover (+12%), which aligns with research finding higher alcohol consumption during the early stages of the pandemic<sup>2</sup>.

Sub-sector	Measure & Change 20/21	% Core NTE
<i>Establishments</i>		
 Drink	9,028 +4.6%	7%
 Entertainment	36,777 +7.0%	30%
 Food	77,511 +9.6%	63%
<i>Employment</i>		
 Drink	119,950 +8.8%	11%
 Entertainment	257,810 +28.6%	25%
 Food	673,885 +15.5%	64%
<i>Turnover</i>		
 Drink	\$20.9bn +8.5%	16%
 Entertainment	\$39.4bn -6.7%	30%
 Food	\$72.9bn +10.4%	55%

# The NTE in states and territories

Between 2019/20 and 2020/21, every state and territory experienced establishment, employment, and turnover increases in the Core NTE. While employment and sales turnover have grown strongly across every state and territory it should be noted this reflects returning post-pandemic recovery, with **most states or territories remaining below 2018/19 levels**.

In terms of employment, **Tasmania** had the greatest increase (+25%), which followed a 10% fall last year. In sales turnover, **Western Australia** had the strongest growth (+14%), following a decline of 4% from 2018/19 to 2019/20.

Establishment growth in **New South Wales** was driven by its Food sub-sector (+13%), with the NSW Dine & Discover program and the 24 Hour Economy Strategy important factors. While Core NTE establishment growth has been strong, employment (-18%) and sales turnover (-6%) remain below 2018/19 levels.

**Victoria** has shown strength in its Food sub-sector (+10% in establishments) with Food employment at +1% above pre-pandemic levels. Sales turnover is still 3% below. Core NTE employment overall is slightly below 2018/19 (-1%). These figures indicate a strong return to pre pandemic levels.

In **Queensland**, the Core NTE is slightly below pre-pandemic employment levels (-2.6%) and almost 9% down on sales turnover, despite strong establishment growth. Food (+6.8%) and Entertainment (+8.5%) establishment growth has been particularly strong.

**Western Australia** is one of the few states to see sales turnover surpass pre-pandemic levels (by 10%) driven by strong increases in Drink (particularly *Liquor Retailing*) and Food (*Cafes and Restaurants*). There is a similar story in **South Australia**, although the growth in these two sectors in 2020/21 was just below, and did not quite reach, 2018/19 levels (-0.5%).

**Tasmania's** strong employment growth (+25%) means employment is now 13% higher than 2018/19 levels thanks to strong growth in Food and Drink – although sales turnover is still 4% below 2018/19.

**Australian Capital Territory** is the only area to have surpassed pre-pandemic performance in employment (+8.5% on 2018/19) and sales turnover (+2.9%), with Food and Drink being the key drivers.

Finally, despite strong growth in 2020/21, the **Northern Territory** is still substantially below 2018/19 figures in employment (-16%) and turnover (-6.5%), mainly due to a slow recovery in Entertainment.

Table 1: Core NTE by state/territory from 2018/19 (pre-pandemic) to 2020/21 with change since 2019/20

State / Territory	Core NTE establishments				Core NTE employment ('000s)				Core NTE sales turnover (\$bn)			
	2018/19	2019/20	2020/21	% Change 2020-21	2018/19	2019/20	2020/21	% Change 2020-21	2018/19	2019/20	2020/21	% Change 2020-21
ACT	1,818	1,811	1,955	8.0%	29.9	31.1	32.4	4.3%	\$3.5	\$3.4	\$3.6	6.3%
NSW	37,786	38,357	42,405	10.6%	342.7	250.0	279.4	11.8%	\$42.8	\$38.4	\$40.3	5.0%
NT	757	783	788	0.6%	18.4	12.5	15.4	23.1%	\$2.3	\$1.9	\$2.1	11.0%
QLD	19,750	19,879	21,224	6.8%	222.5	178.8	216.6	21.1%	\$26.9	\$24.2	\$24.5	1.4%
SA	6,602	6,763	7,109	5.1%	79.0	65.8	76.6	16.5%	\$9.3	\$8.6	\$9.3	8.3%
TAS	2,169	2,289	2,353	2.8%	23.9	21.6	27.0	25.0%	\$2.9	\$2.6	\$2.8	6.8%
VIC	31,799	33,553	36,701	9.4%	287.5	232.0	285.4	23.0%	\$36.9	\$34.2	\$34.3	0.2%
WA	10,287	10,276	10,712	4.2%	120.5	103.2	118.8	15.1%	\$14.9	\$14.3	\$16.3	14.0%
<b>Australia</b>	<b>110,935</b>	<b>113,726</b>	<b>123,316</b>	<b>8.4%</b>	<b>1,124.3</b>	<b>894.9</b>	<b>1,051.7</b>	<b>17.5%</b>	<b>\$139.5</b>	<b>\$127.6</b>	<b>\$133.2</b>	<b>4.4%</b>

Source: Based on Australian Bureau of Statistics CABEE 2016-2021 dataset, Ref: WTS/Comparisons – State







# The NTE in CCCLM member cities

This section explores NTE trends across each of the CCCLM member cities. An initial overview is followed by a sub-section on each member city. Each city council has provided details of initiatives and strategies introduced to help support the recovery of their NTEs, which is followed by a review of NTE performance in 2020/21. Of the member cities, Sydney maintains its position as densest night time economy in Australia, with 209 Core NTE establishments per km<sup>2</sup>. Sydney LGA also has the second largest number of establishments (5,589) and this has grown strongly since 2019/20 (+9.0%) following a period of stagnation last year.

In fact, many of the member cities have seen strong establishment growth in the last year, particularly those in New South Wales, with Newcastle (+12.3%), and Parramatta (+10.4%) each experiencing stronger growth than all other cities. Schemes such as 'Dine & Discover' as well as the introduction of the NSW 24 Hour Economy Strategy will have played a role in this performance.

Adelaide has experienced strong growth (+6.9%) to 2020/21, as has Brisbane (+5.6%), which maintains its position as the largest NTE in Australia, with over 7,000 businesses.

Melbourne was the fastest growing NTE in 2019/20 increasing 8.4% on the previous year, but this has slowed slightly in 2020/21, increasing 4.4% and likely a reflection of the COVID restrictions in place. With Victorian establishments increasing 9.4% on last year it suggests that growth is occurring outside the capital and potentially in the suburbs – although Maroondah experienced a similar level of growth (+4.9%).

Other notable increases include Canberra and Perth growing well (+8.0% / +2.2%) following contractions in their establishment base last year (-0.4% / -2.4%) along with Hobart and Darwin maintaining a steady growth in 2020/21 (+4.6% / +4.8%). These changes are explored in more detail in each city's dedicated report section.

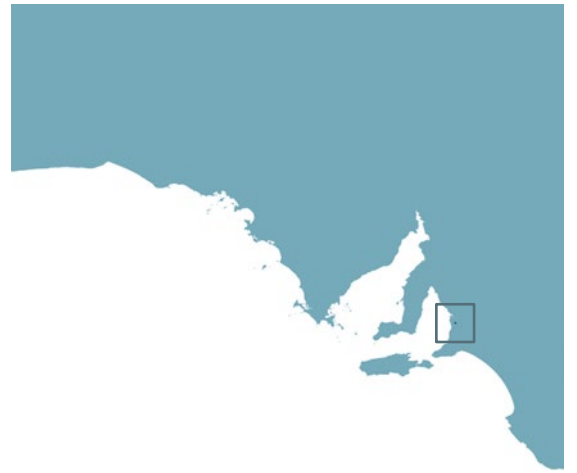
Table 2: Core NTE by CCCLM member city from 2018/19 (pre-pandemic) to 2020/21 with change since 2019/20

LGA Name	Core NTE establishments				Core NTE employment ('000s)				Core NTE sales turnover (\$bn)			
	2018/19	2019/20	2020/21	% Change 2020-21	2018/19	2019/20	2020/21	% Change 2020-21	2018/19	2019/20	2020/21	% Change 2020-21
Adelaide	842	861	920	6.9%	11.4	9.1	10.9	19.7%	\$1.28	\$1.14	\$1.27	11.4%
Brisbane	6,524	6,629	7,002	5.6%	70.2	60.0	71.1	18.4%	\$8.51	\$7.74	\$7.92	2.4%
Canberra	1,818	1,811	1,955	8.0%	29.9	31.1	32.4	4.3%	\$3.46	\$3.35	\$3.56	6.3%
Darwin	407	418	438	4.8%	5.5	3.7	4.8	28.9%	\$0.68	\$0.57	\$0.64	12.2%
Hobart	549	589	616	4.6%	7.0	6.6	7.9	19.8%	\$0.83	\$0.74	\$0.78	5.3%
Maroondah	413	427	448	4.9%	3.2	2.6	2.9	14.3%	\$0.38	\$0.33	\$0.33	-1.1%
Melbourne	2,547	2,767	2,890	4.4%	32.0	27.1	31.1	15.0%	\$3.69	\$3.35	\$3.35	-0.1%
Newcastle	854	875	983	12.3%	13.2	11.2	12.6	12.7%	\$1.60	\$1.49	\$1.55	4.4%
Parramatta	1,227	1,295	1,430	10.4%	8.4	6.8	8.2	19.9%	\$1.16	\$1.03	\$1.16	12.6%
Perth	638	623	637	2.2%	10.0	8.3	10.0	21.1%	\$1.11	\$1.05	\$1.22	16.7%
Sydney	5,096	5,128	5,589	9.0%	36.1	27.6	32.3	17.3%	\$4.53	\$3.92	\$4.44	13.2%

Source: Based on Australian Bureau of Statistics CABEE 2020-21 dataset, Ref: WTS/City Rankings

# Adelaide

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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 is renowned as Australia's festival city.





## City Initiatives

Adelaide is the cultural heart of South Australia and given it has been such a tough period for the arts and entertainment, Council has prioritised finding innovative solutions to safely hold events and performances. New road closures, additional pop-up spaces, curated outdoor dining experiences, and crowd control measures from the City of Adelaide ensured a COVID-safe festival season that set a global standard for festival and event delivery during a pandemic. These initiatives saw city streets buzzing with people, boosting Adelaide's night time economy, and enhancing its global reputation as a 'magnet city' and [UNESCO City of Music](#).

In January 2021, Council launched the [Adelaide Economic Development Agency](#) (AEDA). AEDA works closely with businesses, industry groups, state government agencies and other relevant organisations to deliver a range of programs designed to stimulate the city's economic growth, with a focus on investment attraction, growing the visitor economy, residential growth, marketing the city as a whole and promoting Rundle Mall as Adelaide's premier shopping destination.

Examples of initiatives by the City of Adelaide include:

- [Outdoor Activation Grants](#) of \$862,000 supported 128 businesses to continue to trade by expanding their footprint and improving their street appeal, jointly funded with the State Government.
- [Dining voucher campaigns](#) were launched support the hospitality sector, attracting people back to the City and leveraging the State Government's 'Great State' experience and accommodation offer. This included Adelaide's [Long Lunch](#) \$30 voucher program and a winter campaign called [Hit the Town](#).
- Working in partnership with the South Australian Tourism Commission to market Adelaide as a [must stay destination](#), through Luxury Escapes, which resulted in the sale of \$24,000 in accommodation packages.
- Over \$1.3 million in [Events and Festivals](#) Sponsorship funding was distributed in grants, generating an estimated economic benefit of \$51 million to South Australia.
- The [Quick Response Fund](#) provided more than \$85,000 in sponsorship funding to help twelve festivals and events respond to the impacts of COVID-19.
- \$200,000 was secured from the State Government for [Mainstreets and Laneways Revitalisation and Improvement Grants](#) to enhance street frontages, improve amenity, and increase capacity.
- Strict social distancing measures meant New Year's Eve celebrations needed to adapt from mass gatherings to intimate Midnight Moments. Twelve venues were each supported with \$14,000 to assist in the payment of musicians on [New Year's Eve](#).

The City of Adelaide has invested more than \$20 million in COVID-19 City support programs since the beginning of the pandemic. This includes the [Reignite Adelaide](#) initiative, which included market research undertaken by McGregor Tan to investigate methods to bring people back to the city, additional Mainstreet and Laneway Revitalisation and Improvement Grants for both the 2021/22 and 2022/23 financial years and a Council decision to strategically respond, and develop Adelaide's NTE, including establishing a [Night Time Economy Advisory Committee](#) in the 2022/23 financial year.



## NTE Performance

Adelaide has the highest density of Core NTE, Food and Drink businesses per residential population when compared to the 88 local government areas analysed.







When compared to the national average, Adelaide's Core NTE comprises a higher proportion of Food (71% compared to 63% nationally) and Drink (15% vs. 7% nationally) establishments. Because of this, it also has a smaller proportion of Entertainment establishments (14% vs. 30% nationally). Between June 2020 and June 2021, the number of Core NTE establishments in Adelaide grew by 59 (+7%).

Most of Adelaide's growth in Core NTE establishments was within the **Food** sub-sector (+45 / +7%), and more specifically within the *Cafes and Restaurants* industry (+44 / +10%). In June 2021, these *Cafes and Restaurants* industry employed 5,990 people – 355 fewer than in June 2019.

Adelaide's **Drink** sub-sector gained 8 new businesses between June 2020 and June 2021 bringing the total to 141. Most (125) of these Drink businesses belong to the *Pubs, Taverns and Bars* industry, which gained 5 additional businesses in 2020-21. The remaining 16 businesses are classified as *Liquor Retailing*.

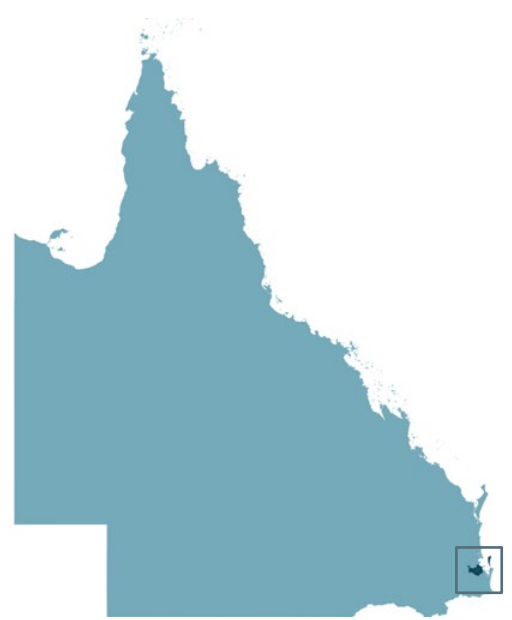
Adelaide's **Entertainment** Sector comprised 126 establishments in June 2021, 6 more than the previous year (+5%). Just over half of Adelaide's Entertainment sub-sector establishments are classified as *Creative and Performing Arts Activities*. In the 2020/21 financial year this industry, however, accounted for 40% of Adelaide's Entertainment employment and 31% of its turnover. While employment in *Creative and Performing Arts Activities* had exceeded pre-pandemic levels by June 2021, sales turnover (\$73m) remained below that of 2018/19 (\$94m).

### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	920 +6.9%	8.0%
 Employment	10,910 +19.7%	12.2%
 Sales Turnover	\$1,267m +11.4%	4.5%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	141 +6.0%	15.3%
 Entertainment	126 +5.0%	13.7%
 Food	653 +7.4%	71.0%
Measure	# 2021 % Change 20-21	Density
 Population	25,551 -1.8%	1,640 per km <sup>2</sup>

# Brisbane

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Brisbane is a diverse and vibrant city, with an extensive geographic footprint. In 2021, the International Olympic Committee elected Brisbane as the Host City of the 2032 Olympic and Paralympic Games, which is expected to boost tourism and deliver health, volunteering and community benefits.





## City Initiatives

Brisbane City Council has been taking action to help rebuild Brisbane's night time economy by delivering initiatives under the [Economic Recovery Plan](#). This includes:

- Working with the music industry to deliver the new [Winter Sessions](#) music festival
- Delivery of the free [Brisbane app](#) to promote businesses and experiences via a one-stop destination built for residents, visitors and local businesses to find things to see and do in Brisbane.
- A [\\$5 million Economic Relief Package](#) to support businesses and organisations impacted by the pandemic by waiving a significant number of fees, rents and charges between 1 January and 31 March 2022.

Brisbane City Council acknowledges the ongoing challenges businesses have faced throughout the pandemic and the need to strengthen the night time economy for today and into the future.

The [Creative Brisbane Creative Economy Strategy](#) aims to strengthen Brisbane's liveability as a vibrant creative hub. The strategy will ensure Brisbane is the premier location for talented people to live, work, play, raise families, and develop careers and economic potential. Council invests in and supports individuals, organisations, venues and events that offer evening and night time experiences.

Between October to December 2021, Brisbane City Council conducted a series of [community and business engagement activities](#) to understand how best to develop the night time economy.

During 2020/21, Brisbane City Council continued to back local businesses by easing the financial burden,

supporting jobs and encouraging the community to get outside and explore their city and local businesses.

Examples include:

- Direct support for businesses by waiving business fees, as well as leases and rents for Council lessees
- Rates rebates, relief and deferrals for eligible residents and businesses
- The return of some of Council's most popular festivals and events including Outdoor Cinemas in the Suburbs, celebrating Asian culture with BrisAsia Festival, supporting the live music industry with Valley Fiesta and Botanica – Contemporary Art Outside, an open-air art exhibition in the City Botanic Gardens
- The launch of the [Brisbetter Local](#) and [Brisbetter Days Out](#) campaigns to highlight and encourage visitation to local retail, dining, and recreation venues in every Brisbane postcode and including Brisbane's NTE
- Supporting the CBD through exclusive offers, activities and entertainment as part of [Dine BNE City](#), [Sea to the City](#), [Shop BNE City](#) and Fridays in the City promotional campaigns.



## NTE Performance

The scale of the Brisbane LGA geography explains its comparatively high number of residents, which helps to deliver the highest number of Core NTE, Food and Entertainment businesses of the 88 local government areas analysed in this research for the year to June 2021. It also had the second highest number of Drink businesses.

When compared to the rest of Australia, Brisbane's Core NTE exhibits a smaller proportion of **Drink** establishments (4% compared to 7% nationally). The number of Pubs, Taverns and Restaurants in Brisbane fell by 11% (-29) between June 2020 and June 2021 further reducing this sub-sector's share of the city's Core NTE.

Between June 2020 and June 2021, the number of **Food** establishments in Brisbane increased by 6%. Unlike Australia as a whole (which has experienced growth in the Food sub-sector driven primarily by Cafes and Restaurants), this growth was due to relatively even growth in *Cafes and Restaurants* (+128) and *Takeaway Food Services* (+122). Following a sharp fall in employment at the height of the pandemic, Brisbane's Food sub-sector employment has made a strong recovery, and by June 2021 employed 3,430 more people than in June 2019.

Brisbane's **Entertainment** sub-sector gained 8% (+150) more businesses between June 2020 and June 2021. The majority of these were classified as *Creative and Performing Arts Activities* (+91), followed by *Sports and Physical Recreation Activities* (+56). These industries account for 46% and 36% of Brisbane's Entertainment establishments respectively. Employment and sales turnover in these industries in 2020/21, however, remained below the pre-pandemic baseline, mirroring the trend occurring at the state and national level.

### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	7,002 +5.6%	5.4%
 Employment	71,065 +18.4%	10.3%
 Sales Turnover	\$7,920m +2.4%	3.6%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	269 -9.1%	3.8%
 Entertainment	2,088 +7.7%	29.8%
 Food	4,645 +5.7%	66.3%
Measure	# 2021 % Change 20-21	Density
 Population	1,264,024 -0.2%	941 per km <sup>2</sup>

# Canberra

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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 most cafes, restaurants, bars and entertainment venues including theatres and cinemas.



## City Initiatives

A strong night-time and entertainment economy aligns with the ACT Government's core strategic priorities, including:

- [Canberra: Australia's Arts Capital A Statement of Ambition for the Arts 2021–2026](#), which aims for Canberra to be recognised as Australia's arts capital by creating, developing and promoting the ACT's arts, cultural and creative industries, practices and facilities.
- [CBR Switched On: ACT's Economic Development Priorities 2022–2025](#), which aims to support Canberra as a city that draws people in, supported by a strong economic foundation, to develop Australia's capital as a global destination.

In response to the COVID-19 pandemic and its impact on local business, the ACT Government set up the Better Regulation Taskforce, with the aim of making it easier to start up, run and grow a business in the ACT. The findings of the Taskforce were presented in its report [\*Better Regulation: A Report on how we are improving business regulation in the ACT\*](#).

The ACT Government will also be developing a night-time and entertainment economy regulatory quality framework approach. Through this reform measure, the Taskforce will identify changes to legislation and regulatory practices, with the aim of optimising settings for businesses in the night-time and entertainment economy and supporting economic growth in the ACT. This is consistent with the need to balance regulatory reform with consumer protection, harm reduction and other public policy outcomes. This reform will put in place best practice regulatory settings to ensure that the regulatory arrangements for the night-time and entertainment economy are

meeting their intended objectives efficiently and effectively in a complex and changing environment.

In addition to regulatory support, the Canberra Business Advice and Support Service aids small businesses through access to business advice, financial and legal advice, and mental health and wellbeing services.

Examples of initiatives that have been available to support NTE businesses during the pandemic include:

- The [Amp It Up! Fund](#), which assisted small and medium live music venues to engage artists and independent sound or lighting technicians, offsetting the costs of programming and promotion.
- The [COVID-19 Business Support Grants and Small Business Hardship Scheme](#), which provided reimbursement for eligible small business' costs in relation to selected utilities, commercial rates and commercial vehicle registrations, up to \$10k.

In addition, Skills Canberra support a skills pipeline for all ACT sectors (including the NTE), and are supporting businesses by targeting required skills through the [ACT Critical Skills List](#) (which includes Chefs, Cinema or Theatre Managers, and Cafe or Restaurant Managers, among others), prioritising training of people in the Territory.

The ACT Government also continues to focus efforts on attracting, rebuilding and supporting the international student cohort and the tertiary education sector which provides a large portion of the workforce in the ACT's NTE sector.



## NTE Performance


Canberra's Core NTE accounts for a higher proportion of its total establishments (6%), employment (14%) and turnover (5%), when compared to Australia overall (5%, 8% and 3% respectively). These figures demonstrate the role that the Core NTE plays in the capital's economic prosperity. Canberra's Core NTE has a higher proportion of Food businesses, at 69%, compared to 63% nationally, and a lower proportion of Entertainment establishments (25% compared to 30% nationally).

Between June 2020 and June 2021, the number of Core NTE businesses in Canberra increased by 144 (+8%), to a total of 1,955. Most gains were in the **Food** sub-sector (+117 / +9%), with the addition of 83 *Cafes and Restaurants* and 34 *takeaway Food Services*. By June 2021, both employment and turnover in the Food sub-sector exceeded pre-pandemic levels.

Canberra's **Drink** sub-sector experienced a strong percentage gain in establishments between June 2020 and June 2021 (+12 / +12%), with all 12 of these additional businesses classified as *Pubs, Taverns and Bars*. As with the Food sub-sector, the Drink sub-sector had exceeded pre-pandemic employment and sales turnover levels by June 2021.

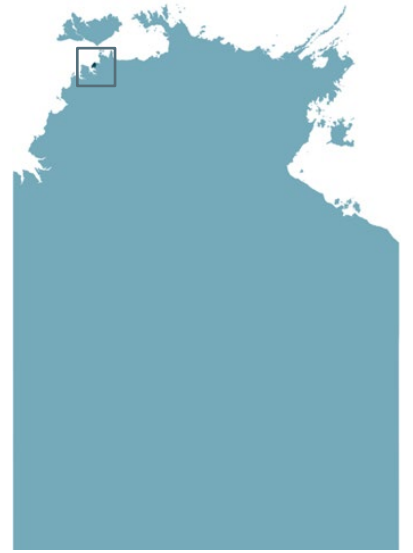
The **Entertainment** sub-sector in Canberra has been slower to recover than the Food and Drink sub-sectors, with just 7 more businesses in June 2021 than there were in June 2019, and reduced employment numbers (-40). Sales turnover in the 2020/21 financial year was \$982m, compared to \$1,013 in 2018/19; \$31m below the pre-pandemic peak. The greatest sales losses were in the *Creative and Performing Arts Activities* (-\$35m) and *Amusement and Other Recreation Activities* (-\$23m) industries. *Clubs (Hospitality)* industry sales turnover, however, was \$34m higher in 2020/21 than in 2018/19.

### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	1,955 +8.0%	6.2%
 Employment	32,395 +4.3%	13.9%
 Sales Turnover	\$3,563m +6.3%	5.3%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	111 +12.1%	5.7%
 Entertainment	487 +3.2%	24.9%
 Food	1,357 +9.4%	69.4%
Measure	# 2021 % Change 20-21	Density
 Population	453,558 +0.6%	192 per km <sup>2</sup>

# Darwin

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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.



Photo by Helen Orr for Darwin Festival



### City Initiatives

This year has seen an extension and expansion of successful strategies to grow the Night Time Economy coupled with new initiatives being trialled in Darwin.

The City of Darwin sought to support retail traders through successive rounds of the [MyDarwin](#) voucher initiative seeing over 141,500 vouchers redeemed with 343 merchants.

The City's laneways have been activated leveraging a broader set of principles established in the [Movement Strategy](#) by encouraging tourists to explore hidden 'off the beaten track' experiences by foot, thereby extending their time and spend across the city.

A series of strategically positioned parklets have been planned to encourage a culture of year-round outdoor dining and foster a deliberate shift in community perceptions to embrace the seasons rather than shunning 'the wet'. This is supported with an extension of the [moratorium on alfresco dining fees](#) to encourage hospitality businesses to extend their operating hours and participate in creating a vibrant after-dark atmosphere.

The [Street Food Program](#) sees an assortment of mobile vendors activate an array of picturesque public spaces throughout Darwin including parks and beaches. With 27 vendors operating across 13 sites the program is fully subscribed.

The successful introduction of [e-Scooters](#) has been expanded to include e-Bikes alongside the extension of use-zones to facilitate linkage routes between existing entertainment precincts beyond the CBD including the Mindil Night Markets and casino.

As active sponsors of the Hot August Nights [Darwin Festival](#), City of Darwin's Civic Park transforms into 'Festival Park' each night for the three-week event that is the Territory's biggest festival of arts and culture

with international headline acts, outdoor dining and local music talent.

Surrounded by street art, restaurants, a boutique gin distillery and wine bar, the introduction of the [Austin Lane Markets](#) meet-the-maker events showcase locally made products from 30 vendors alongside live music to introduce a once-a-month social centre in the heart of the city on Wednesday evenings.

The [Darwin Safer City Program](#) includes assertive outreach and support services to improve outcomes for vulnerable people and provide amenable public spaces for the community to enjoy with a sense of safety and confidence at night.

The most significant impediment to growth and expansion of the NTE has been the ongoing absence of an international backpacker workforce due to the pandemic. Difficulties with worker attraction and retention has had a direct impact on the scale of re-opening of hotels and span of operating hours in hospitality. An existing Friendly City agreement with Denpasar was accelerated to [Sister City](#) status, leading to a Council-hosted trade mission aimed at attracting workers to support our hospitality sector. The delegation included representatives from MigrationNT and various Darwin-based education institutions who promoted Darwin as a destination to study, work, live, and do business for the 267 Denpasar officials and the business community.

Through its partnership with all tiers of government, the Larrakia people, private sector and Charles Darwin University, the City of Darwin continues to deliver on the [Darwin City Deal](#). This 10-year plan includes a series of projects designed to advance digital capability, cooling initiatives, integrated city-wide planning for best practice tropical living, and to grow the population.



# NTE Performance

Darwin's Core NTE is important to the city's total economy. It represents a higher proportion of its total businesses (6%). It generates a higher proportion of its employment (10%) and sales turnover (4%) than the national Core NTE average (5%, 8% and 3% respectively). In 2020-21, Darwin gained 20 Core NTE establishments (+5%), bringing the total to 438. The city has a large proportion of Food and a smaller proportion of Entertainment and Drink establishments.

Darwin's **Food** sub-sector includes a high proportion of Takeaway Food Services (48%) and gained three more of these establishments in 2020/21. Sales turnover in this industry, however, remained lower in 2020/21 than in 2018/19. Employment returned to pre-pandemic levels. The key driver of Food establishment growth in 2020/21, was the addition of 17 *Cafes and Restaurants*. In 2020/21, this industry had a higher sales turnover but fewer employees than in the re-pandemic timeframe.

Darwin's **Entertainment** establishments remained relatively static in 2020/21, with small changes across industries, such as 4 fewer *Gambling Activities* establishments and a small increase in *Creative and Performing Arts Activities* (+4) and *Sports and Recreation Activities* (+4) businesses. Despite some signs of recovery, the sub-sector had 480 fewer employees in June 2021 than in June 2019, largely due to lower employment in the *Gambling Activities* industry (-285). Similarly, the sub-sector generated \$42m less sales turnover in 2020/21 than it did in 2018/19.

Darwin's **Drink** sub-sector comprises 24 establishments, the majority of which are classified as *Pubs, Taverns and Bars* – although the city had 4 fewer of these businesses in 2020/21 than in 2019/20. Despite establishment losses, both employment and sales turnover in Darwin's Drink sub-sector rose to above pre-pandemic levels in 2020/21.

## Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	438 +4.8%	6.1%
 Employment	4,820 +29.0%	9.7%
 Sales Turnover	\$642m +12.2%	4.2%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	24 -14.3%	5.5%
 Entertainment	115 +3.6%	26.3%
 Food	299 +7.2%	68.3%
Measure	# 2021 % Change 20-21	Density
 Population	85,397 -0.4%	768 per km <sup>2</sup>

# Hobart

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A waterfront city with a rich history, Hobart is the capital of the island state of Tasmania. From Kunanyi / Mt Wellington to the Derwent River, the natural landscape shapes Hobart. It has a reputation for excellent food and wines and spirits from local producers; arts and culture; and local artisans and markets. The Hobart community vision statement sums up the connection between the natural environment and how it shapes Hobart life.





## City Initiatives

The Council has undertaken a number of initiatives to support the NTE sector and to encourage people to come into the city.

In terms of **financial assistance to businesses**, the Council has introduced a rates freeze and provided \$607k in assistance for business rate payers experiencing financial hardship. In many cases, the Council has waived or reduced fees for outdoor occupancy licences (\$137k) and food licencing (\$121k), while \$37k in rent relief was provided to tenants of city-owned properties. To guide Council support, an Economic Recovery Consultative Group was established and trialled between 2020 and 2021.

The Council provided support for the return of **Dark Mofo** music and arts festival in 2021 through in-kind funding (\$200k) for equipment for the Winter Feast. This support has continued into 2022 with the provision of cash for the Winter Feast naming rights (\$150k) and further in-kind funding for 2022 Dark Mofo (\$180k).

Following cancellation of the Taste of Tasmania in 2020, a refreshed festival took place in 2021. The **Taste of Summer** was delivered by a private consortium and supported through a combination of State Government funding and in-kind funding from the Council (\$445k).

The **Out in the Open** series of events, activities, performances and happenings commenced as part of a summer campaign of continuous, smaller-scale public activations including Hobart's Long Waterfront Weekend. In addition, grants totalling \$480k were awarded across several programs that supported the NTE. In addition, an **outdoor dining** project has been developed to provide more dining opportunities. This includes a trial in Midtown that incorporates built-in furniture, planters and bike racks.

The Council has led on many initiatives to support the development of safe public spaces. For example, the **Street Teams** project re-commenced following a break during COVID-19 lock-downs. This is a joint initiative that provides safety for patrons at Hobart waterfront entertainment establishments during the period 10.30pm to 3am on Friday and Saturday nights. In addition, the Council has upgraded security infrastructure within Wellington Court, Elizabeth Mall and the Salamanca precinct. The second stage upgrade of Salamanca Place has also been completed which provides a multi-purpose plaza space and safer pedestrian connections.

Council operated its **Christmas Season Program** to attract patrons back to the city. This program included community carol events and block parties supported by the Council as well as a New Year's Eve fireworks display along the waterfront.

Other initiatives operated by the Council to support the NTE include:

- Free parking opportunities.
- The temporary establishment of a **Business Concierge** service to provide a central point of contact for business enquiries.
- **'Hello Hobart'** - A local business marketing campaign.

## NTE Performance

Hobart's Core NTE represents 9% of all its businesses, 15% of its employment and 5% of the sales turnover generated within its economy. This is much higher than nationally, where the figures are 5%, 8% and 3% respectively – highlighting that Core NTE businesses are a key strength in Hobart's economy.

Hobart's Core NTE has a higher proportion of Food (68%) and Drink (10%) establishments than Australia as a whole (63% and 7% respectively). As a result, its Entertainment sub-sector represents a smaller percentage of all Core NTE establishments (23% compared to 30%), even though entertainment is a strong performer – especially across this report period.

The number of **Food** establishment in Hobart increased to 416 (+3%) between June 2020 and June 2021. Food businesses (76%) are *Cafes and Restaurants*, while the remaining 24% are *Takeaway and Food Services*. Both employment and sales turnover has remained strong in these industries and each has grown since the start of the pandemic.

The total number of **Drink** establishments in Hobart has remained static between June 2020 and June 2021, although there are now fewer *Pubs, Bars and Restaurants* and more *Liquor Retailing* outlets.

Hobart has experienced the highest percentage growth in **Entertainment** establishments of the 14 cities examined within this report (+12% compared to +7% nationally). This equated to 15 additional businesses, bringing the total number to 141. Most of these new businesses belong to the *Creative and Performing Arts Activities* industry. This industry accounts for 57% of Hobart Entertainment sub-sector. Despite the growth in establishments in this industry (and a gain of 140 employees), the industries' sales turnover remains \$41m (31%) less in 2020/21 than it was pre-pandemic (2018/19).

### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	616 +4.6%	9.1%
 Employment	7,885 +19.7%	14.9%
 Sales Turnover	\$780m +5.3%	5.0%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	59 +1.7%	9.6%
 Entertainment	141 +11.9%	22.9%
 Food	416 +2.7%	67.5%
Measure	# 2021 % Change 20-21	Density
 Population	56,084 -1.4%	720 per km <sup>2</sup>



# Maroondah

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Situated to the east of Melbourne's CBD, Maroondah is considered the gateway to the Yarra Valley, with key centres in Ringwood and Croydon. Ringwood's Eastland Shopping Centre hosts extensive dining experiences and a 4.5-star hotel. The transformation of this family orientated destination has acted as a catalyst for the regeneration of the area.



## City Initiatives

During 2022/23, Maroondah City Council has continued to support NTE businesses, through a diverse range of assistance programs delivered directly or in partnership with other organisations.

**Supporting businesses during COVID-19:** BizHub (Council's Economic Development Team) provided ongoing assistance to businesses in response to the pandemic. This included a business concierge service addressing business needs, providing connection to experts and mentors, grant opportunities and wellbeing supports, and assisting with permits and approvals through the Better Approval Process. BizHub also provided sector-specific support, with risk assessments and translated COVIDSafe information.

**The Bayswater Business Precinct Transformation Strategy:** Council continued to work in partnership to implement the Bayswater Business Precinct Transformation Strategy to maintain and strengthen the economic value of the Bayswater Business Precinct. The Strategy was developed in partnership with Knox and Yarra Ranges Councils and funded by the Victorian Government.

**A strategic review of shopping centres:** An assessment of nine shopping centres was undertaken to consider amenities, access and transport, to inform future planning and investment. The review also considered post-pandemic economic recovery planning considerations, identifying short term actions to improve amenities and activate all 31 shopping centres across Maroondah. In response to the review, infrastructure upgrades have commenced to enhance the amenity of a range of shopping centres.

**Expanding outdoor dining opportunities:** To support local hospitality businesses and provide COVIDSafe meeting opportunities, Council has worked with several centres and traders' associations to provide

safe outdoor dining facilities. Supported by the Victorian Government's Outdoor Eating and Entertainment Grants package, the Street Activities Extension Permit scheme provided temporary outdoor dining options for hospitality businesses to shift their service to footpaths, streets, laneways and car parking spaces. Council adjusted permit processes and fees to support these changes, helping to bring activity and people back to shopping centres.

**Delivering cultural events and pop-up parks:** An extensive program of arts and cultural events were delivered between December 2021 and May 2022, including the Ringwood Town Square Neon Lights; Wyreana Cultural Activations; and the Gluttony Festival in Croydon. Five 'pop-up' parks were also installed in Ringwood, Croydon, Croydon North and Bayswater North to provide additional seating and to improve the appearance of local shopping centres.

**Delivering place activation projects:** Ringwood East and Croydon South received funding support from the Victorian Government's Neighbourhood Activity Centre Renewal Fund. Infrastructure and amenity upgrades, and a program of arts activations were undertaken in both centres, with the support of local community, organisations and traders. The Ringwood East Place Activation Project was a finalist in the 2021 Mainstreet Australia Awards.

**The Maroondah Liquor Accord:** A joint initiative between licensees, Victoria Police, Council and the Victorian Commission for Gambling and Liquor Regulation. Established in 2015, the Accord recommenced in May 2022 (following a pandemic hiatus) attracting 50-80 attendees twice a year for networking and training opportunities.

**New car parks:** Council secured \$81.6m in Australian Government funding for new activity centre carparks.



## NTE Performance

During the 2020-21 financial year, Maroondah's NTE gained 21 establishments (+4.9%). The number of NTE employees also increased (+14%), although remained below 2018-19 levels. NTE sales turnover declined slightly, driven by slower recovery in the Entertainment sub-sector. The distribution of NTE establishments in Maroondah is similar to the national average, albeit with a slightly higher proportion of Food establishments.

In the 2020-21 financial year, Maroondah gained 13 new *Takeaway Food Services* businesses but lost 4 *Cafes and restaurants* within its **Food** sub-sector. Employment and sales turnover followed a similar pattern, as both remained lower than pre-pandemic levels for *Cafes and Restaurants* but exceeded pre-pandemic levels in *Takeaway Food Services*.

Maroondah also gained 9 new **Drink** establishments in 2020-21. This increased the total number of Drink establishments from 20 to 29 (+45%). Most of these are *Liquor Retailing* (7), while the other two are classified as *Pubs, Taverns and Bars*. Employment and Turnover have both grown in these industries, and now exceed 2018-19 levels.

**Entertainment** establishments in Maroondah increased by 3 (+2%) in 2020-21. There were small changes in business numbers within the industries that make up the Entertainment subsector. The most notable detail is the loss of 5 *Clubs (Hospitality)* establishments and the addition of 3 *Sports and Physical Recreation* establishments. Employment in Entertainment increased overall but remained below 2018-19 levels. Sales turnover remained below pre-pandemic levels; \$90.3m 2020-21 compared to \$124.0m in 2018-19. *Creative and Performing Arts Activities* generated substantially less turnover in 2020-21 (\$47.6m), when compared to 2018-19 (\$71.9m).

### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	448 +4.9%	4.7%
 Employment	2,925 +14.3%	5.3%
 Sales Turnover	\$326m -1.1%	2.0%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	29 +45.0%	6.5%
 Entertainment	129 +2.4%	28.8%
 Food	290 +3.2%	64.7%
Measure	# 2021 % Change 20-21	Density
 Population	116,080 -1.7%	1,890 per km <sup>2</sup>

# Melbourne

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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. In 2022, the Economist Intelligence Unit ranked Melbourne as Australia's most liveable city.





## City Initiatives

As we reignite the economy, the City of Melbourne has a distinctive offer as both a central entertainment district and a central business district, creating a city of possibility. The vision for Melbourne is not only to revitalise the municipality's economy, but to set it up to thrive. Central to this is the night time economy, which drives visitation and underpins Melbourne's reputation as a global leader in culture, entertainment, hospitality and events.

Melbourne has introduced range of support measures and grants to advance this vision, and in May 2022 City of Melbourne Councillors voted to extend the [Night Time Economy Advisory Committee](#) (NTEAC) for a further twelve months. Since its establishment in June 2021, the NTEAC has provided a collaborative platform for exchange and consultation between Council and the night time economy sector, allowing the City of Melbourne to harness strategic advice and direction from relevant industry, government and academic representatives. The NTEAC is comprised of 17 committee members and includes representatives of the hospitality, arts and entertainment sectors, members of academia, State Government and City of Melbourne Councillors. Penny Miles, a performing arts professional with over 25 years' experience in the sector has recently been appointed as the new Chair of the NTEAC.

The Council Plan 2021-2025 names Melbourne as the City of Possibility and its night time economy significantly contributes to the cities culture and vibrancy. One recent example of a significant support measure is the highly successful [Melbourne Money](#) scheme, which ran for three rounds across 2021 and 2022. The scheme offered patrons discounts on dining out and provided \$98 million in economic stimulus to City of Melbourne hospitality venues. In addition, more than 160,000 diners stated that they

engaged in other activities such as shopping, attending sporting events, museums and live music events while participating the scheme.

The City of Melbourne and Victorian Government partnered to deliver the \$200m [Melbourne City Revitalisation Fund](#) (MCRF). The fund sought to finance arts and cultural events and support small businesses to recover as people returned to the city. Grant programs under the MCRF include the Event Partnerships Program, City Activation Grants Program and City Revitalisation Event Support Program, calling for new and innovative activations and events to attract visitors to Melbourne.

Additional NTE support initiatives include:

- City of Melbourne have issued 1,000+ additional [outdoor dining](#) permits, installed more than 190 parklets and have directly supported over 1,000 businesses to trade safely during the pandemic. Approximately \$2.36m of outdoor dining fees have been waived since October 2020, with fee waivers extended to 31 October 2022.
- Continuation of the [Business Concierge program](#): a dedicated team established to support the City's business community with the likes of identifying financial support, assisting start-ups and transforming operating models.
- The establishment of [Invest Melbourne](#) in 2021, to drive economic recovery and investment.
- Delivering a suite of [premier events](#) (including Moomba Festival, Melbourne Fashion Week, Melbourne Music Week, Melbourne Knowledge Week, New Year's Eve, Christmas Festival and Docklands Firelight Festival) and providing sponsorship support to event organisers through the Event Partnership Program and the Arts and Creative Investment Partnerships.

## NTE Performance

When compared to the rest of Australia, Melbourne's NTE makes up a higher-than-average proportion of its total economy establishment base (7% compared to 5%), employment (10% vs. 8%) and turnover (4% vs. 3%). Melbourne's NTE comprises particularly strong Food and Drink sub-sectors but has a smaller proportion of Entertainment establishments than the national average. In 2020/21, the city NTE gained 123 establishments (+4.4%). Employment increased but remained below 2018/19 levels. Sales turnover also remained below pre-pandemic levels, with a further small decline of -0.1%.

Between June 2020 and June 2021, Melbourne gained 51 **Entertainment** establishments (+9%). The biggest growth was in *Creative and Performing Arts Activities* (+33) and *Sports and Physical Recreation Activities* (+14), while there was a loss of 6 *Clubs (Hospitality)* businesses. *Creative and Performing Arts Activities* make up more than half (54%) of Melbourne's Entertainment sub-sector. By June 2021, more people were employed in this industry than in June 2019. Sales turnover, however, continued to decline since last year (\$360m in 2020/21 compared to \$518m in 2018/19) highlighting a slower recovery for this sub-sector.

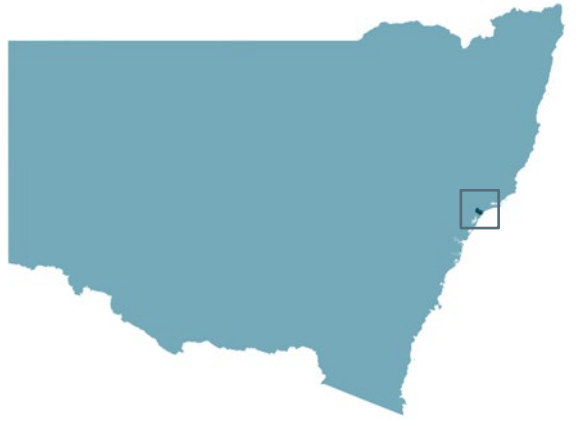
The city's **Food** sub-sector has a particularly high number of *Cafes and Restaurants* (1,520 / 74%) and a smaller proportion of *Takeaway Food Services* (26%). Both industries gained new establishments in 2020/21 (+68 combined). Melbourne's Food employment and sales turnover made a good recovery in 2020-21 but remained slightly below 2018-19 levels.

Melbourne's **Drink** sub-sector gained 4 establishments in 2020-21. In the *Liquor Retailing* industry, employment and sales turnover had exceeded 2018/19 levels. In *Pubs, Taverns and Bars*, however, while employment had recovered by June 2021, sales turnover in 2020/21 (\$234m), remained below that of 2018/19 (\$245m).

### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	2,890 +4.4%	7.0%
 Employment	31,145 +14.9%	10.1%
 Sales Turnover	\$3,346m -0.1%	3.6%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	234 +1.7%	8.1%
 Entertainment	608 +9.2%	21.0%
 Food	2,048 +3.4%	70.9%
Measure	# 2021 % Change 20-21	Density
 Population	153,674 -10.0%	4,093 per km <sup>2</sup>





# Newcastle

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Newcastle has a rich character and history combined with a selection of beautiful beaches. Situated at the mouth of the River Hunter, it 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.



## City Initiatives

Once again, the impacts of COVID-19 have been felt in Newcastle's Night-time Economy. Despite these challenges, in 2021/22 the City of Newcastle deployed perhaps the most ambitious and innovative activations ever seen in Newcastle.

A project jointly funded by the City of Newcastle and NSW Communities and Justice through the Community Safety funding was tasked to address known crime hotspots across the city with Crime Prevention Through Environmental Design principles. While traditional methods like lighting and CCTV offer valid solutions, the City of Newcastle in partnership with the University of Newcastle's FASTLab, proposed an innovative design outcome - interactive light boxes that would illuminate the locations and entice community to engage with art, music and augmented reality. Here, the [Night Galleries project](#) was born.

The project was the result of extensive collaboration with FASTLab, local industrial design manufacturers Design Anthology, and local software engineers. Now situated at three locations across the city, each site is a modern take on the ancient concept of Stone Henge. Monuments that light up, and feature some of Newcastle Art Gallery's most significant artworks are overlaid with proximity sensors, augmented reality, and an array of sound files to invite exploration and curiosity in spaces which were otherwise largely unutilised and unsafe at night. This project demonstrates the intrinsic link between Newcastle's night-time economy and smart city infrastructure. City of Newcastle explored this further when they presented to the [Economic Development Association](#) on the topic in July 2022.

Beyond the Night Galleries project, City of Newcastle has been leveraging opportunities for local businesses to recover from the impacts of COVID-19. In early

2022, City of Newcastle was successful in gaining funding from the CBDs Revitalisation Program administered by the NSW Government. Funded by this grant a month-long celebration, dubbed [Autumn Alive](#) was delivered. Along with significant programming, City of Newcastle developed a dedicated business support program, allowing local businesses to put forward unique offers ranging from special shopping experiences, pop up performances in venues, or dedicated food and drink offers for activations. This business support program was complimented by extensive programming for the month and was designed to bring the community back into the CBD and to enable local businesses to test new offerings in a lower risk environment.

To continue supporting live music and performance across the city, the City of Newcastle ran two successful rounds of the [Locally Made and Played](#) grant. An extra boost was awarded to local creatives through [City of Newcastle's Live and Out program](#) which focused on building capacity in emerging performers and event producers across the performing arts scene. The program culminated in a month of performances held in a centrally located city park, which highlighted diversity and inclusivity.

The City of Newcastle has continued its research into understanding the unique properties of its Night-time Economy. 2021/22 saw the development of the [Healthy Precincts Framework](#), a bespoke tool designed to better understand and plan interventions for distinct areas of the Newcastle night-time economy.



## NTE Performance

The Core NTE is an important contributor to the total Newcastle economy. It accounts for 7% of businesses, 13% of jobs and 5% of sales turnover (compared to 5%, 8% and 3% nationally). In 2020/21, the city had the highest percentage growth in Core NTE establishments (+12%) of all 14 CCCLM member cities, with the addition of 108 businesses, mostly within Food and Entertainment. Despite this growth, Core NTE sales turnover in 2020/21 had not fully recovered and was \$48m (-3%) below the pre-pandemic 2018/19 baseline.

Newcastle's Core NTE has a high proportion of **Drink** establishments (11%), when compared to Australia as a whole (7%). Growth in Drink has slowed relative to other sub-sectors, with the city gaining 3 *Pubs, Bars and Taverns* in 2020/21. Economic performance in Drink has been strong with pre-pandemic employment levels maintained and 2020/21 sales turnover exceeding 2018/19 performance by \$29m.

The city has a strong and growing **Entertainment** sub-sector, comprising 301 establishments. The highest proportion of these are in *Creative and Performing Arts Activities* (48%) and *Sports and Physical Recreation Activities* (27%), with these industries gaining 11 and 16 businesses respectively in 2020/21. In June 2021, there were 520 more people employed in Newcastle's Entertainment sub-sector than there were in June 2019, with particularly strong employment growth in *Creative and Performing Arts Activities industry*. Sales turnover in this industry and the overall Entertainment sub-sector in 2020/21, however, was \$85m lower than in 2018/19.

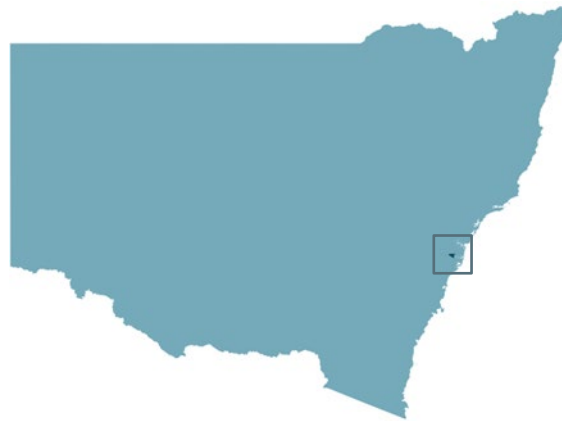
In 2020/21, Newcastle gained 73 **Food** businesses (+15%), 72 of which are classified as *Cafes and Restaurants*, which is a factor in the sub-sector's strong turnover performance in 2020/21 (\$8m higher than 2018/19). Despite this growth, employment in the Food sub-sector in June 2021 remained 14% lower than in June 2019.

### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	983 +12.3%	6.9%
 Employment	12,585 +12.7%	12.3%
 Sales Turnover	\$1,553m +4.4%	4.9%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	112 +2.8%	11.4%
 Entertainment	301 +11.9%	30.6%
 Food	570 +14.7%	58.0%
Measure	# 2021 % Change 20-21	Density
 Population	169,317 +0.9%	907 per km <sup>2</sup>

# Parramatta

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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. The Parramatta Night City Framework 2020-2024 aims to harness opportunities presented by growth and changing demographics to diversify night time offerings and meet community needs and aspirations.





## City Initiatives

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 hour CBD and 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 July 2021, the City of Parramatta [announced a package of measures worth up to \\$2.9 million](#) to support local businesses and households impacted by the COVID-19 pandemic. The support package reinstated various measures first brought in during 2020, including the waiving of licensing and outdoor dining approval fees for local businesses, parking concessions to facilitate takeaway services, and rates relief.

In February 2021, the City of Parramatta delivered a [Night Time Economy Activation Grants](#) program. This program was aimed at supporting 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.

From March to April 2022, the City of Parramatta ran a [six week Autumn Event series](#) in the Parramatta CBD with support from the NSW Government's Open Streets and CBD Revitalisation programs. The free events program which catered to all ages included the inaugural Parramatta Nights Street Festival, two large scale concerts in Parramatta Park, an outdoor roller-rink, jazz after dark in Parramatta Square, performances by some of Australia's most renowned First Nations artists and art installations across the CBD.

['Experience Harris Park'](#), a multi-channel marketing campaign, was run in July 2022 with the goal of promoting the local suburb of Harris Park a vibrant and culinary destination that boasts some of the best subcontinental food in Australia. In August 2022, Harris Park and the Parramatta River Foreshore were activated with [creative lighting installations](#) in celebration of the 75<sup>th</sup> year of Indian independence and the Diwali festival. Both initiatives were supported by the NSW Government's CBDs Revitalisation Program.

The City of Parramatta is progressing its draft [Late Night Trading Development Control Plan](#), an objective development assessment framework for licensed and non-licensed trading between 10pm and 6am. The controls will include place-based acoustic controls that look to balance vibrancy and amenity; trial periods for extended hours that aim to provide certainty for venues operators and management of venue impacts; and standardised and impact-based plan of management requirements to facilitate good venue management practices.

## NTE Performance


In 2020/21, Parramatta's Core NTE gained 135 (+10%) establishments. Sales turnover generated by Core NTE businesses had recovered to almost pre-pandemic levels, although employment in June 2021 was 3% (-235) less than in June 2019.

Parramatta's Core NTE has a particularly strong **Food** sub-sector, comprising 77% of Core NTE establishments (63% nationally) and increasing 11% since last year. In 2020/21, the city gained 164 *Cafes and Restaurants* but lost 58 *Takeaway Food Services* following a similar pattern to other NSW LGAs. Food sales turnover in 2020/21 exceeded pre-pandemic 2018/19 levels by \$24m. Despite these strengths, June 2021 employment in the city's Food sub-sector remained -545 (-10%) below what it was in June 2019.

Parramatta's **Entertainment** establishments make up just 19% of Parramatta's Core NTE (compared to 30% nationally). In 2020/21, the city gained 22 Entertainment establishments (+9%), including 16 classified as *Creative and Performing Arts Activities* and 12 *Sports and Recreation Activities*. There were small losses of establishments across several other industries, such as *Clubs (Hospitality)* (-3) and *Horse and Dog Racing Activities* (-2). In June 2021, employment in Entertainment in Parramatta was +16% higher than in June 2019 (+365).

In 2020/21, the city experienced strong growth in its **Drink** sub-sector, with the addition of 7 establishments (+18%). This included an extra 5 *Liquor Retailing* outlets and 2 *Pubs, Bars and Taverns*. While *Liquor Retailing* employment had exceeded pre-pandemic levels by June 2021, employment in *Pubs, Bars and Taverns* remained slightly lower than in June 2019. Sales turnover followed the same trend, with *Liquor Retailing* sales turnover \$18m higher in 2020/21 than in 2018/19 and *Pubs Bars and Taverns* \$1.7m lower.

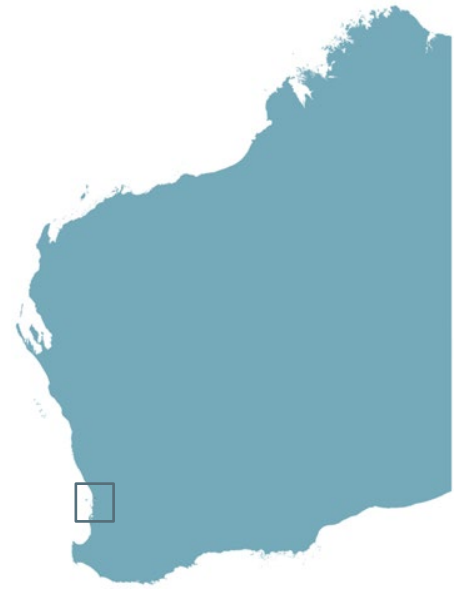
### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	1,430 +10.4%	4.9%
 Employment	8,160 +19.9%	7.1%
 Sales Turnover	\$1,161m +12.6%	3.2%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	46 +17.9%	3.2%
 Entertainment	278 +8.6%	19.4%
 Food	1,106 +10.6%	77.3%
Measure	# 2021 % Change 20-21	Density
 Population	258,315 -0.6%	3,081 per km <sup>2</sup>



# Perth

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Australia's most geographically unique 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.



## City Initiatives

In 2021-22, the Council has continued to engage stakeholders through the established Perth Liquor Accord and to provide a range of initiatives to support NTE establishments, including free night-time parking in Council carparks and fee-free simplified outdoor dining permits. The Council, together with Chamber of Commerce and Industry WA has continued to advocate for extended trading hours to support business activity for major events and public holidays.

The Council has approved a new **10-year City-wide Economic Development Strategy** that outlines major themes and a range of initiatives. The Strategy was informed by an in-depth understanding of the City's economy, global and regional influences, city benchmarking, sector profiling, analysis of comparative advantages and challenges, and extensive stakeholder consultation. One of the Strategy's major themes is:

*"A City Reimagined - Position Perth as a place where people want to be day and night"*

Targeted initiatives have been developed within the Strategy to support the growth and development of the City's shoulder and night-time periods. These include partnering on and delivering programs to **promote the City of Perth as an extended hours destination with a vibrant NTE**, as well as delivering programs and policies to support the City's increased residential population.

Other projects that will support a vibrant NTE include the \$22M enhancement of Roe Street to improve access and connect the CBD to Northbridge and Northbridge Laneways enhancement design under the CBD Transport plan component of the Perth City Deal. Retail mall refreshes, with Hay Street completed and Murray Street programmed for this year, including a **"Light it up" program** that will install five

creative lighting installations in entertainment precincts, the "Gateway" lighting statement on the Adelaide Terrace pedestrian bridge (eastern entry to the city), and significantly enhanced funding for ongoing functional and creative lighting throughout the city.

The City has progressed with technical studies to investigate practical implementation of additional development within the proposed **Northbridge Special Entertainment Precinct**. This work will ensure Northbridge remains the State's premier entertainment precinct and to reduce the potential impact of noise complaints on residents and business.

A **range of economic development support measures** have been rolled out to help local businesses in 2021-22 to a value of \$4.86m. This includes 34 safer spaces grants, seven business improvement grants (expanded allocation for 2022-23), 13 targeted economic development industry sponsorships, and 120 small business bounce back grants. These measures have helped businesses recover from the pandemic. The hallmark Christmas Lights Trail Event grows bigger each year and secured naming rights sponsorship from Rio Tinto, other new night-time events have been undertaken such as a Drone Light Show.

City **sponsorship and grants programs** totalling \$6.4 million focus on supporting initiatives that will improve public places, attract events and visitation to support the NTE.

Finally, the City has successfully advocated for additional policing presence in the malls and Northbridge. This has resulted in increased safety and security for visitors and businesses during the evening hours, and has been supported by the City's ongoing collaboration with WA Police.

## NTE Performance

In 2020/21, Perth's NTE gained 14 establishments and employment had rebounded to 2018/19 levels, while sales turnover surpassed pre-pandemic levels.

A much higher proportion of Perth Core NTE establishments are classified as belonging to the **Drink** sub-sector (17%), when compared to the rest of Australia (7%). The city has a high density of Drink businesses per 10k residents; second only to Adelaide. Most of Perth's Drink businesses belong to the *Pubs, Taverns and Bars* industry (84%), with the remainder being *Liquor Retailing* establishments (16%). Employment in the Drink sub-sector had returned to just above June 2019 levels by June 2021. Sales turnover growth has been strong, however, with 2020/21 sales turnover 20% higher than in 2018-19.

In June 2021, Perth's **Food** sub-sector comprised 324 *Cafes and Restaurants*, and 122 *Takeaway Food Services*. Employment in both industries grew in 2020-21, although while *Cafes and Restaurants* employment had exceeded June 2019 levels, *Takeaway Food Services* was yet to fully recover. Sales turnover in both industries, however, is above pre-pandemic levels.

The city also has a much smaller proportion of **Entertainment** establishments, as a percentage of overall NTE establishments, comprising 80 establishments in June 2021 (13% compared to 30% nationally), which is unchanged since June 2020. The industry with the highest number of Entertainment establishments is *Sports and Physical Recreation Activities* (29). Perth gained 6 additional businesses classified as *Amusement and Other Recreation Activities* and 4 businesses classified as *Creative and Performing Arts Activities* in 2020-21. Both employment and sales turnover in Perth's Entertainment sub-sector remains below 2018-19 levels.

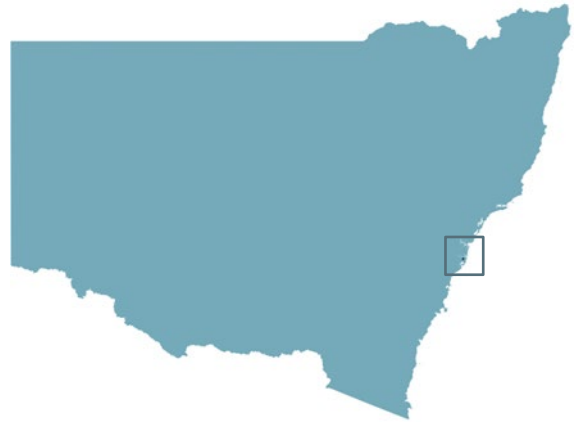
### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	637 +2.2%	5.3%
 Employment	10,025 +21.1%	8.4%
 Sales Turnover	\$1,220m +16.7%	3.1%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	111 +3.7%	17.4%
 Entertainment	80 +0.0%	12.6%
 Food	446 +2.3%	70.0%
Measure	# 2021 % Change 20-21	Density
 Population	29,667 0.0%	2,160 per km <sup>2</sup>



# Sydney

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Australia's Harbour City 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 its world class dining and bar options, the City of Villages offers it all.



Photo credit: Cassandra Hannagham

## City Initiatives

During the summer of 2020/21, the NSW Government partnered with the City of Sydney Council to deliver a \$20m CBD-focused revitalisation program. The aim of the program was to support businesses, promote public space activation. This included the delivery of a range of initiatives to encourage more people to visit, eat, shop and enjoy the city centre.

In March and April 2021, the [Sunset Piazza](#) program, curated by Sydney Festival, delivered 32 nights of pop-up outdoor live performances in Cathedral Square spanning pop, cabaret, comedy, hip-hop, indie rock and opera. More than 15,000 tickets were sold, supporting 450 artists and creative practitioners.

The City of Sydney's [Alfresco Outdoor Dining Program](#), which commenced in November 2020 has been extended to 30 June 2023. Between November 2020 and 30 June 2022, 478 applications were approved. These approved applications included 133 requests to reallocate 1,787m<sup>2</sup> of road space to outdoor dining, and a further 345 requests to reallocate 4,266m<sup>2</sup> of footway space. In addition, more than \$5.3m of footway dining fees have been waived as part of this program. In a March 2022 survey, 91% of Alfresco Outdoor Dining Program participants reported the program was either beneficial or crucial to their business. Almost three quarters (74%) of participants had employed an additional one or more staff per week and 39% had experienced up to a 20% increase in turnover.

The City of Sydney provided further investment in 2021/22 through the delivery of the Council's [Community Recovery Plan](#). This included working with Destination NSW to develop a marketing campaign, engaging local creatives into the City's programs and facilitating the return of international students.

The City has provided close to \$12m in grant funding to nightlife businesses and creative enterprises since March 2020 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 in piloting new operational models and innovative projects.
- 108 Night-Time Diversification and Live Music and Performance business grants valued at over \$1.54m.
- 96 CBD Activation grants valued at \$3m to support businesses 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.
- 14 Precinct Activation Grants valued at \$3m to support collaborative partnerships between businesses, creatives and communities that renew and transform our city centre, local precincts and neighbourhoods.

In addition to the above support, between April 2020 and June 2022, the City of Sydney Council waived \$3.1m in rent relief for creative spaces, short term vacant property, creative accommodation, and live/work tenancies. The City continues to provide rent relief to its commercial property tenants with \$1.5m in deferred rent and \$11.5m in rent relief to date.

## NTE Performance

Sydney has the densest Core NTE of all 88 areas analysed, with 209 establishments per km<sup>2</sup>. The city's Core NTE comprises a greater proportion of Food (70%) and Drink (12%), and therefore percentagewise (18%), fewer Entertainment establishments when compared to Australia (63%, 7% and 30% respectively).

Sydney's **Food** sub-sector comprises 3,939 businesses – an increase of 10% on 2019/20. Most of Sydney's Food businesses (84%) are *Cafes and Restaurants*, which gained 463 businesses in 2020/21. During the same period the city lost 111 *Takeaway Food Services*. There is the potential that the Dine & Discover NSW scheme may have led to some businesses updating their industry classification, as Takeaways were not eligible to participate initially. Employment and sales turnover followed a similar trend, with *Cafes and Restaurants* exceeding 2018/19 sales by \$349m in 2020/21. *Takeaway Food Services* in contrast, was \$180m lower than 2018/19.

In 2020-21, Sydney gained 49 **Entertainment** businesses (+5%). The greatest number of these were in *Sports and Physical Recreation Activities* (+31 / +10%). This is perhaps a reflection of growing consumer demand for outdoor and healthy activities following the easing of lockdowns and pandemic restrictions. Employment in all of Sydney's Entertainment industries had returned to pre-pandemic levels by June 2021 but sales turnover remained lower than in 2018/19 across most industries.

The city gained 60 **Drink** establishments in 2020/21 (+10%). While employment had not recovered to pre-pandemic 2018/19 levels by June 2021 (-15%), sales turnover had (+3%). Employment and turnover in *Liquor Retailing* was higher in 2020/21 than 2018/19 but this was not the case for *Pubs, Taverns and Bars*.

### Key Metrics

Measure	# Core NTE 2021 % Change 20-21	% Total Economy
 Establishments	5,589 +9.0%	11.2%
 Employment	32,330 +17.3%	6.7%
 Sales Turnover	\$4,438m +13.2%	3.8%
Sub-sector	# Establishments % Change 20-21	% Core NTE
 Drink	666 +9.9%	11.9%
 Entertainment	984 +5.2%	17.6%
 Food	3,939 +9.8%	70.5%
Measure	# 2021 % Change 20-21	Density
 Population	214,851 -5.3%	8,054 per km <sup>2</sup>



# Appendix

## Data sources

### Economic performance

The data used in this report was acquired from the Australian Bureau of Statistics (ABS) via bespoke request from their Counts of Australian Businesses, including Entries and Exits (CABEE), June 2017 to June 2021 dataset<sup>ii</sup>. Through a collaborative approach with the ABS, the bespoke request covered a selection of key ANZSICs for a total of 88 of the most populous and economically active Local Government Areas (LGAs) in Australia. This dataset was analysed and modelled using additional ABS datasets including labour force data<sup>iii</sup> and industry sales and service income<sup>iv</sup> 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<sup>v</sup> techniques when dealing with smaller numbers, in order 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 of the 30<sup>th</sup> 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. For larger businesses with complex and diverse legal structures, the ABS liaises directly with the businesses to determine Type of Activity Units (TAUs). These larger businesses are referred to as profiled businesses.

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.

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<sup>ii</sup> [ABS Catalogue 8165.0 - Counts of Australian Businesses, including Entries and Exits, Jun 2016 to Jun 2021](#)

<sup>iii</sup> [ABS Catalogue 6202.0 - Labour Force](#)

<sup>iv</sup> [ABS Catalogue 8155.0 – Australian Industry](#)

<sup>v</sup> The ABS Catalogue 8165.0 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](#))

## 2020/21 considerations for the CABEE dataset

The Australian Bureau of Statistics has noted the following impacts on the CABEE series as a result of COVID-19, which should be borne in mind when reviewing results:

- Fewer business exits have occurred during 2020-21 compared to 2019-20 (12.0% vs 12.8%).
- Many businesses have re-categorised from non-employing to employing. In 2020-21 employing businesses increased 13.6% while non-employing businesses decreased by 2.2%.
- There has been a marked increase in businesses updating their ANZSIC information on the Australia Bureau Register through 2020-21 leading to movements in businesses between ANZSICs.
- CABEE data for the September and December 2021 quarters shows a significant increase in the number of business entries in Victoria, with the entry rate substantially higher than other states and territories.
- The CABEE data was updated to exclude all superannuation funds – consisting of all units in ANZSIC class 6330. This was done to align the dataset with international standards and produce a more realistic count of actively trading businesses. This has reduced business counts by c100,000 across Australia. As such, historical numbers have been adjusted to the new 2021 figures.

## References

<sup>1</sup> The Property Council of Australia, (2022) Stall in return to office, <https://research.propertycouncil.com.au/blog/stall-in-return-to-office>

<sup>2</sup> Australian Institute of Health and Welfare, (2022), Alcohol, tobacco & other drugs in Australia, <https://www.aihw.gov.au/reports/alcohol/alcohol-tobacco-other-drugs-australia/contents/impact-of-covid-19-on-alcohol-and-other-drug-use>

## NTE definition

As noted in the Glossary of Terms, Night Time Economy activity is broken down into Core, Non-Core and Supply sectors.

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 the United Kingdom's Standard Industrial Classifications (SICs) to Australia's 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 since been adopted by the Greater London Authority (GLA) for the purpose of measuring London's NTE with equivalent data from the [United Kingdom's Office for National Statistics \(ONS\)](#). The GLA's [analysis](#) utilised data from the ONS' 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 economic 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.

*Table 3: Core NTE ANZSIC definition*

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

<sup>vi</sup> 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.

<sup>vii</sup> 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.

<sup>viii</sup> 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.

<sup>ix</sup> ANZSIC 920 (Gambling Activities) includes ANZSIC 9209 (Other Gambling Activities), which captures internet gambling operation and TAB operation, that may occur during the day.



Table 4: 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 5: 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

## Core NTE LGA rankings

Table 6: Core NTE Establishments in 2020/21 with density and % change from 2019/20 – part 1

Position	LGA Name	State	Establishments	Density Per km <sup>2</sup>	% Change 20-21
1	City of Sydney	NSW	5,589	209.3	9.0%
2	Waverley Council	NSW	774	82.3	2.5%
3	Yarra City Council	VIC	1,588	81.4	7.7%
4	City of Melbourne	VIC	2,890	77.1	4.4%
5	North Sydney Council	NSW	772	73.5	8.0%
6	Port Phillip City Council	VIC	1,408	68.3	8.4%
7	City of Adelaide	SA	920	59.0	6.9%
8	Inner West Council	NSW	1,711	48.6	6.0%
9	City of Stonnington	VIC	1,204	46.8	15.5%
10	City of Perth	WA	637	46.5	2.2%
11	Woollahra Municipal Council	NSW	546	44.4	8.1%
12	Burwood Council	NSW	315	44.4	9.4%
13	City of Canada Bay Council	NSW	669	33.6	8.4%
14	Willoughby Council	NSW	690	30.8	8.3%
15	Glen Eira City Council	VIC	973	25.1	8.4%
16	Randwick City Council	NSW	875	24.1	5.5%
17	Maribyrnong City Council	VIC	745	23.9	21.7%
18	Moreland City Council	VIC	1,157	22.7	11.0%
19	Georges River Council	NSW	855	22.3	7.3%
20	City of Boroondara	VIC	1,342	22.3	1.1%
21	City of Darebin	VIC	1,091	20.4	12.2%
22	Bayside Council	NSW	994	19.6	16.0%
23	City of Ryde	NSW	784	19.4	9.7%
24	Bayside City Council	VIC	681	18.3	1.6%
25	Moonee Valley City Council	VIC	780	18.1	8.6%
26	City of Parramatta	NSW	1,430	17.1	10.4%
27	City of Whitehorse	VIC	1,053	16.4	4.4%
28	City of Monash	VIC	1,307	16.0	3.1%
29	Cumberland Council	NSW	1,097	15.1	10.5%
30	City of Canterbury Bankstown	NSW	1,638	14.9	9.3%
31	Kingston City Council	VIC	956	10.5	11.7%
32	City of Charles Sturt	SA	529	9.7	7.5%
33	Banyule City Council	VIC	593	9.5	9.2%
34	City of Stirling	WA	992	9.5	6.9%
35	City of Burnside	SA	255	9.3	9.9%
36	Fairfield City Council	NSW	807	8.0	8.9%
37	City of Hobart	TAS	616	7.9	4.6%
38	Hobsons Bay City Council	VIC	494	7.7	11.3%
39	Maroondah City Council	VIC	448	7.3	4.9%
40	Manningham City Council	VIC	809	7.1	-0.7%
41	City of Greater Dandenong	VIC	904	7.0	16.5%
42	Ku-ring-gai Council	NSW	593	6.9	5.5%
43	Northern Beaches Council	NSW	1,699	6.7	11.8%
44	City of Brimbank	VIC	792	6.4	8.9%
45	Knox City Council	VIC	708	6.2	6.5%

Table 7: Core NTE Establishments in 2020/21 with density and % change from 2019/20 – part 2

Position	LGA Name	State	Establishments	Density Per km <sup>2</sup>	% Change 20-21
46	City of Joondalup	WA	535	5.4	2.3%
47	City of Newcastle	NSW	983	5.3	12.3%
48	Brisbane City Council	QLD	7,002	5.2	5.6%
49	City of Blacktown	NSW	1,203	5.0	17.8%
50	City of Darwin	NT	438	3.9	4.8%
51	City of Frankston	VIC	495	3.8	12.2%
52	Sutherland Shire Council	NSW	1,132	3.4	9.9%
53	City of Mitcham	SA	244	3.2	-2.4%
54	City of Casey	VIC	1,234	3.0	14.2%
55	City of Gold Coast	QLD	3,667	2.8	7.9%
56	Liverpool City Council	NSW	785	2.6	15.1%
57	The Hills Shire Council	NSW	984	2.5	11.2%
58	Wyndham City	VIC	1,195	2.2	18.0%
59	Hume City Council	VIC	883	1.8	20.1%
60	City of Whittlesea	VIC	837	1.7	17.2%
61	Campbelltown City Council	NSW	475	1.5	19.3%
62	Penrith City Council	NSW	617	1.5	7.1%
63	Wollongong City Council	NSW	964	1.4	13.4%
64	Hornsby Shire Council	NSW	629	1.4	10.7%
65	Mornington Peninsula Shire	VIC	882	1.2	7.7%
66	Lake Macquarie City Council	NSW	674	1.0	10.1%
67	Melton City Council	VIC	503	1.0	15.9%
68	City of Greater Geelong	VIC	1,186	1.0	13.0%
69	Central Coast Council	NSW	1,520	0.9	15.5%
70	Canberra	ACT	1,955	0.8	8.0%
71	Albury City Council	NSW	245	0.8	16.7%
71	City of Ballarat	VIC	571	0.8	9.2%
72	Byron Shire	NSW	435	0.8	18.2%
73	Sunshine Coast Council	QLD	1,621	0.7	11.3%
74	Maitland City Council	NSW	277	0.7	20.4%
75	Nillumbik Shire Council	VIC	293	0.7	1.7%
76	Moreton Bay Regional Council	QLD	1,169	0.6	4.1%
77	Cairns Regional Council	QLD	788	0.5	6.6%
78	City of Wodonga	VIC	138	0.3	23.2%
79	Port Stephens Council	NSW	256	0.3	8.9%
80	City of Launceston	TAS	352	0.2	0.9%
81	Townsville City Council	QLD	626	0.2	5.0%
82	City of Greater Bendigo	VIC	447	0.1	4.2%
83	Hawkesbury City Council	NSW	297	0.1	5.3%
84	Port Macquarie-Hastings Council	NSW	363	0.1	12.0%
85	Toowoomba Regional Council	QLD	576	0.0	15.4%
86	Mackay Regional Council	QLD	322	0.0	9.5%
87	Bathurst Regional Council	NSW	153	0.0	5.5%
88	Queanbeyan-Palerang Regional Council	NSW	211	0.0	18.5%



## State sector breakdown

Table 8: Food by state/territory in 2020/21 with change from 2019/20 to 2020/21

State/Territory	Establishments		Employment		Turnover (\$m)	
	Number	% Change 20-21	Number	% Change 20-21	Number	% Change 20-21
New South Wales	26,073	↑ 12.8%	155,375	↑ 3.3%	\$20,448	↑ 11.4%
Victoria	23,589	↑ 10.3%	188,500	↑ 21.0%	\$18,670	↑ 6.0%
Queensland	13,325	↑ 6.8%	147,645	↑ 23.3%	\$14,087	↑ 9.4%
Western Australia	6,703	↑ 4.7%	80,175	↑ 12.6%	\$9,414	↑ 16.5%
South Australia	4,409	↑ 6.4%	50,310	↑ 21.0%	\$5,408	↑ 13.6%
Tasmania	1,526	↑ 4.0%	19,355	↑ 27.8%	\$1,577	↑ 11.6%
Australian Capital Territory	1,357	↑ 9.4%	23,255	↑ 1.9%	\$2,265	↑ 10.1%
Northern Territory	502	↑ 6.6%	9,270	↑ 24.5%	\$998	↑ 15.4%
Australia	77,511	↑ 9.6%	673,885	↑ 15.3%	\$72,866	↑ 10.4%

Source: Based on Australian Bureau of Statistics CABEE 2016-2021 dataset, Ref: WTS/Comparisons - State

Table 9: Drink by state/territory in 2020/21 with change from 2019/20 to 2020/21

State/Territory	Establishments		Employment		Turnover (\$m)	
	Number	% Change 20-21	Number	% Change 20-21	Number	% Change 20-21
New South Wales	3,118	↑ 7.7%	33,900	↑ 0.2%	\$7,339	↑ 9.8%
Victoria	2,632	↑ 6.2%	27,370	↑ 16.3%	\$4,941	↑ 6.1%
Queensland	1,112	↓ -2.5%	21,490	↑ 1.8%	\$2,511	↓ -8.7%
Western Australia	944	↓ -0.6%	17,230	↑ 18.9%	\$3,328	↑ 23.0%
South Australia	822	↑ 5.0%	11,765	↑ 15.3%	\$1,843	↑ 13.5%
Tasmania	217	↓ -2.7%	3,420	↑ 13.1%	\$403	↑ 3.6%
Australian Capital Territory	111	↑ 12.1%	2,375	↑ 12.8%	\$317	↑ 14.1%
Northern Territory	50	↓ -7.4%	2,400	↑ 24.4%	\$268	↑ 15.4%
Australia	9,028	↑ 4.6%	119,950	↑ 8.8%	\$20,949	↑ 8.5%

Source: Based on Australian Bureau of Statistics CABEE 2016-2021 dataset, Ref: WTS/Comparisons - State

Table 10: Entertainment by state/territory in 2020/21 with change from 2019/20 to 2020/21

State/Territory	Establishments		Employment		Turnover (\$m)	
	Number	% Change 20-21	Number	% Change 20-21	Number	% Change 20-21
New South Wales	13,214	↑ 7.0%	90,140	↑ 37.3%	\$12,542	↓ -6.3%
Victoria	10,480	↑ 8.3%	69,550	↑ 31.9%	\$10,666	↓ -10.6%
Queensland	6,787	↑ 8.5%	47,435	↑ 25.2%	\$7,915	↓ -7.6%
Western Australia	3,065	↑ 4.9%	21,375	↑ 22.4%	\$3,602	↑ 1.5%
South Australia	1,878	↑ 2.2%	14,555	↑ 4.0%	\$2,048	↓ -6.8%
Tasmania	610	↑ 2.0%	4,235	↑ 23.3%	\$822	↑ 0.2%
Australian Capital Territory	487	↑ 3.2%	6,765	↑ 10.5%	\$982	↓ -3.6%
Northern Territory	236	↓ -8.5%	3,755	↑ 19.2%	\$857	↑ 5.2%
Australia	36,777	↑ 7.0%	257,810	↑ 28.6%	\$39,434	↓ -6.7%

Source: Based on Australian Bureau of Statistics CABEE 2016-2021 dataset, Ref: WTS/Comparisons - State

STAGE DOOR  
THEATRE