

Measuring the Australian Night Time Economy 2024

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

September 2024

Ingenium Research



ABOUT THE DATA USED IN THIS REPORT

The Council of Capital City Lord Mayors (CCCLM) have been commissioning this annual analysis to measure the size of the Australian Night Time Economy (NTE) since 2012, 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, with reports historically focusing on the Core NTE, comprising Food, Drink and Leisure & Entertainment (consumption) businesses. Last year the report's remit was expanded to include retail (grocery and non-grocery) and accommodation (a sub-set of the Non-Core NTE), to reflect the growing diversity of NTE activities in Australian cities.

This report provides detailed economic performance data for the latest financial year for which official data is available (2022/23). The report also includes data and maps relating to opening hours and clustering of businesses, using a snapshot of business activity data from July 2024. Further detail on the methodology and data sources used in this document can be found in the Appendix. Economic data has been prepared for 88 Australian cities and is summarised in Table 5 on p109 of the Appendix.

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CCCLM Chair's foreword

The Council of Capital City Lord Mayors (CCCLM) is pleased to release its commissioned research into Australia's night time economy for the 2022-2023 financial year. These results, marking the first full year following the COVID-19 pandemic, reflect a solid recovery from the significant impacts of lockdowns and lockouts experienced during that time.

Key insights from the report reveal that the number of Core NTE businesses stabilised during the 2022/23 period, with substantial growth in sales turnover, although this was matched by rising expenses. Employment within the Core NTE has nearly returned to pre-pandemic levels, now just 1% below.

Capital city councils are cautiously optimistic about these results. They remain aware of the changing nature of economic challenges. On the demand side, inflationary interest rates and energy costs are affecting consumer spending across all spend segments. On the supply side, businesses are facing rising borrowing costs and labour supply limitations. Despite these hurdles, the recovery of the night time economy is a positive sign of progress and resilience.

This research update is a valuable contribution to local government's ongoing support to businesses operating at night. The research provides valuable insights that informs future strategies and initiatives aimed at sustaining and enhancing the vibrancy of our cities after dark. The CCCLM is committed to continuing its support for the night time economy, recognising its vital role in the social and economic fabric of Australia's capital cities.

Kon Vatskalis, Lord Mayor of Darwin
CCCLM Chair - 2024



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 classifying establishments to a standardised set of industries
Employment	The number of employees associated with the establishment(s). Elements of charts and infographics relating to employment throughout this report are coloured red.
Establishment(s)	Actively trading business(es) recorded in the Australian Bureau of Statistics Business Register (ABSBR) as at 30 th June in each reporting year. Elements of charts and infographics relating to establishments throughout this report are coloured blue.
LGA	Local Government Area – the municipal geographic area of a local council.
Non-employing business	A business that holds an Australian Business Number (ABN) and is registered for Goods and Service Tax (GST) that does not employ any individuals outside of its directors or sole proprietors.
NTE	Night Time Economy – economic activity which occurs at establishments primarily between the hours of 6pm and 6am The NTE can be broken down into Core, Non-Core and Supply as per the table below. The focus of this report is the Core NTE.
SA2	Statistical Area 2 – An ABS geographic area classification defined using the Census of Population and Housing.
Turnover (\$m)	The sales and service income generated by the establishment(s), exclusive of goods and service tax (GST). Elements of charts and infographics relating to turnover throughout this report are coloured green.
Sector	Description
Core NTE	Economic activity occurring at establishments that provide services to leisure users – mainly between 6pm and 6am. The Core NTE is split into sub-sectors of Drink, Leisure & Entertainment and Food and then further sub-divided by specific activity types.
Hair & Beauty Services	These businesses have been included in the mapping and trading hours data, as some of these establishments offer consumer facing services between 6pm and 6am. The category includes businesses that classify their activity in Google as beauty salons, hair care and spas.
Non-Core NTE	Economic activity occurring at establishments that may operate across the 24-hour day, some of which provide integral services to Core NTE leisure activities. These include public and private transport, hotels and other accommodation, retail services, policing, health, parking, and lighting.
Retail & Accommodation	A subset of Non-Core NTE establishments covering Retail (both Food and Retail/Other) and Accommodation. Please see Table 3 in the Appendix for more detail.
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 activity within a defined geography that is outside the NTE definition.
Total Economy	This is the sum of all economic activity within a defined geography.

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Highlights from the report

At a national level:

The total number of Core NTE **businesses** stabilised in 2022/23

As of June 2023, there were:

- 131,285 Core NTE businesses,
- 88 (-0.1%) fewer than prior year,

This is the first plateau following a period of strong growth.

The largest variations in the number of businesses included:

- Increases in *Creative & Performing Arts* (+3.0% / +581),
- Decreases in *Takeaway Food Services* (-3.1% / -827),
- Increases in *Cafés & Restaurants* (+0.8% / +419).

Core NTE **sales turnover** showed substantial growth – as did expenses

In 2022/23 the Core NTE generated:

- \$174 billion in sales turnover,
- A 19% increase on the previous year
- A recovery to the pre-pandemic trajectory.

While a substantial increase, 2022/23 reflected the first full year of recovery from the pandemic, with the lifting of restrictions and the return of international visitors.

This period also saw high inflation and rising operating costs. For example, expenses in *Accommodation & Food Services* increased by 18%.

Core NTE **employment** returned to just 1% below pre-pandemic levels

As of June 2023, there were:

- 1.1 million employed in the Core NTE,
- 5% more employees than last year.

Core NTE employment has not recovered in line with businesses / sales turnover but had almost recovered to pre-pandemic (2019) levels (-1%) in 2023:

- Five out of eight states and territories surpassed 2019 levels,
- Tasmania (-18%), New South Wales (-9%) and South Australia (-4%) are still below those levels,
- Leisure & Entertainment (-6%) and Drink (-4%) remain below 2019 levels, while Food (+1%) has recovered.

The fifteen city councils participating in this research are implementing a range of initiatives to support their NTEs, including:

<p>Reducing regulatory and financial burdens</p> <p>Cities are lowering liquor licensing fees, simplifying administrative requirements, and extending trading hours for businesses to promote economic growth in the night time economy.</p>	<p>Supporting events and festivals</p> <p>Councils are funding and sponsoring night time events, festivals, and cultural programs to attract visitors and boost local economies.</p>	<p>Improving safety and accessibility</p> <p>Enhancing street lighting, increasing police presence, and collaborating with transport providers to extend service hours for safer and more convenient night time activities.</p>	<p>Promoting outdoor dining and public space activation</p> <p>Simplifying permits for outdoor dining, transforming public spaces for evening use, and supporting initiatives that encourage businesses to utilise outdoor areas.</p>
<p>Encouraging live music and cultural activities</p> <p>Providing grants and partnerships for live music venues, cultural performances, and local artist support to enrich the night time cultural scene.</p>	<p>Marketing and community engagement</p> <p>Implementing marketing campaigns, promoting unique local offerings, and engaging with community groups and businesses to foster a vibrant and inclusive night time economy.</p>	<p>Enhancing visitor experience and tourism</p> <p>Developing tourism campaigns, partnering with tourism platforms, and creating unique experiences such as guided tours and interactive trails to attract and retain visitors after-hours.</p>	<p>Economic incentives and grants</p> <p>Offering economic incentives, grants, and funding programs to support new start-ups, innovative business ideas, and diverse night time economy activities.</p>
<p>Infrastructure and precinct development</p> <p>Establishing and updating entertainment precincts, improving streetscapes, and creating dedicated zones for night time activities to enhance the overall infrastructure.</p>	<p>Community and cultural inclusivity</p> <p>Organising community-centric events that cater to diverse demographics, including families, youth, and elderly residents, ensuring that the night time is inclusive and accessible to all.</p>	<p>Governance and strategic planning</p> <p>Developing strategic plans and frameworks specifically aimed at fostering a sustainable and thriving night-time economy, including setting up advisory committees and conducting ongoing research and analysis.</p>	<p>Leveraging technology and innovation</p> <p>Implementing smart city technologies, such as interactive apps for event information, digital maps for exploring night-time offerings, and data-driven initiatives to monitor and enhance the night-time economy experience.</p>

Introduction

This report provides the latest insights into the state of, and the trends within, Australia's NTE.

Economic data is based on Australian Bureau of Statistics data up to the 2022/23 financial year, providing consistent longitudinal tracking of comparative NTE economic performance at a local government, state/territory and national level.

This analysis is complemented by data drawn from Google Maps in July 2023 and July 2024, allowing more granular analysis of business activity – both geographically and temporally to support NTE policymaking at a local level.

The report begins with an overview of the trends in the economic performance of Australia's night time industries, followed by a summary of trends in the states and territories. It then provides detailed analysis for each of the fifteen participating city councils*.

The analysis of change in this report serves as an invaluable resource for all stakeholders concerned with developing and implementing both established and emerging policy steps in the NTE agenda.

* If your council would like to take part in future iterations of this research, please contact CCCLM via nte@lordmayors.org.



The 2022/23 financial year reflected the first full year of recovery from the pandemic, with the lifting of restrictions and the return of international visitors.

This enabled Australians to fully re-engage with the NTE, with many consumers drawing on savings to participate in social gatherings and domestic holidays – or ‘staycations’. This is reflected in sales turnover figures for the year which show substantial growth – although this was accompanied by similar increases in expenses.

The pandemic has brought about lasting changes in consumer and worker behaviour by way of significant increase in the adoption of digital alternatives for live music, cultural performances, social activities and work-from-home practices. Traditional in-person businesses are increasingly competing with the digital and remote alternatives such as video streaming, online gaming and the offer of convenience from food and beverage home delivery services.

Consumers are also becoming increasingly health-consciousness and have a growing

awareness of sustainability and environmental responsibility.

This new era of consumer behaviour presents both challenges and opportunities for businesses looking to thrive in a post-pandemic world, driving night time businesses to innovate and diversify to meet evolving customer expectations.

Furthermore, the [cost of living](#) crisis, [interest rates](#) and associated [inflationary pressures](#) present a challenge for NTE businesses. Rising living costs are straining household budgets, putting pressure on discretionary spending on NTE activities. This is impacting NTE businesses, alongside increased operational costs, including wages, rent, energy and supply chain expenses.

Maintaining profitability while keeping prices competitive is compounded by ongoing skilled labour shortages. For example, the [priority skills](#) lists a shortage of Chefs in every state and territory.

The return of [international students](#) to near pre-pandemic levels has, provided some

relief, as they contribute significantly to the NTE by both increasing demand for services and helping to alleviate labour shortages, however, the [proposed caps](#) on the enrolment of international students may impact this.

While NTE businesses are currently responding to these challenges, the ‘city initiatives’ sections in this report highlights the extensive support being provided by city councils participating in the research.

Considerable investment in the NTE is also emerging at a state, territory and federal level. For example, via the work of the [NSW Office of the 24-Hour Economy Commissioner](#), the [Queensland’s Premier’s](#) commitment to appointing a new Night Life Economy Commissioner, the [ACT Government’s](#) vision for Canberra’s night time economy and acknowledgements of NTEs in the Australian Government’s draft [National Urban Policy](#). By fostering innovation, supporting sustainable practices, and ensuring the wellbeing of NTE businesses, employees and consumers, Australia’s NTE can be kept vibrant and integral to city life.

The Core NTE in Australia

Following many years of growth, the number of Australian Core NTE establishments stabilised in 2022/23. The number of Food (-408 / -0.5%) and Drink (-37 / -0.4%) establishments declined, but this was balanced out by an increase in Leisure & Entertainment businesses (+357 / +0.9%).

Sales turnover in the Core NTE rose to \$174bn in 2022/23 – a substantial 19% increase on 2021/22 (or 15% when accounting for inflation). The Food (+20%) and Leisure &

Entertainment sub-sectors (+20%) contributed the most to this performance, with the latter surpassing its 2018/19 peak. While these increases are considerable, Core NTE businesses saw increases in expenses over the same period. For example, [accommodation and food businesses saw increases](#) to wages (+23%) and materials (+16%) in 2023 meaning that while sales increased, profitability has not necessarily risen at the same rate.

Core NTE employment continued to recover from the impacts of the pandemic in 2022/23, increasing by 5% to 1.1m employees by 30 June 2023. This brought sector employment back to just 1% below its 2019 pre-pandemic peak, however, as can be seen in Figure 1, employment has not risen in line with establishment and sales turnover figures. It is unknown why this is, but staffing shortages, technological advancements, business confidence and cost savings could all have contributed.




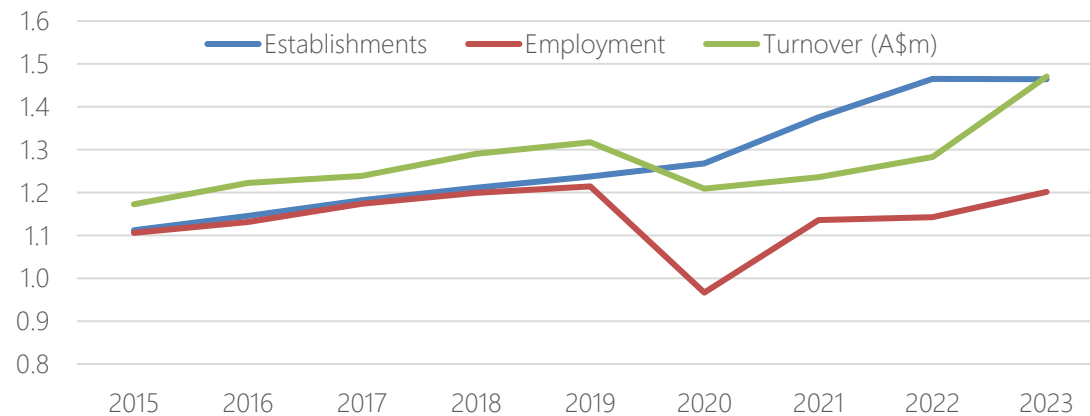
Measure	# Core NTE FY2023 % Change FY22-23	% Total Economy
 Establishments	131,285 -0.1%	5%
 Employment	1,112,360 +5%	8%
 Sales Turnover	\$174bn +19%	3%

Figure 1: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

Leisure & Entertainment

Leisure & Entertainment's establishment growth (+1%) in 2022/23 was driven by increases in *Creative & Performing Arts* (+3% / +581) and *Sports & Physical Recreation* (+2% / +188), offset by losses in other industries. The sub-sector saw a +7% increase in employment, reversing 2021/22 job losses, although employment remained 6% below pre-pandemic. *Creative & Performing Arts* have surpassed pre-pandemic employment levels (+0.1%), while *Sports & Physical Recreation* remain below (-6%). Sales turnover growth in 2022/23 was strong, driven by *Sports & Physical Recreation*. Factoring in inflation, however, the sub-sector is just +3% pre-pandemic performance.

Food

In 2022/23 the Food sub-sector had its first decline in establishment numbers since 2013, due to a loss (-3% / -827) in *Takeaway Food Services*, while *Cafes & Restaurants* increased (+1% / +419). Both activities increased employment (+4% / +5% respectively) and sales turnover (+20% each). As noted earlier, while revenues increased, so did expenses.











Retail & Accommodation (Non-Core NTE)

Both sub-sectors experienced declines in establishments in 2022/23. Accommodation saw particularly strong sales turnover growth (+37%), likely due to continued demand for staycations alongside the return of international visitors. Retail sales turnover increased (+6%), with grocery (+8%) higher than non-grocery (+5%). Accommodation

revenue has recovered to where it would have been had the pandemic not occurred.

Drink

Establishment losses in this sub-sector were due to a decline (-2% / -44) in *Liquor Retailing*, while *Pubs, Taverns & Bars* remained stable. Despite this, both activities saw growth in employment (+3% / +4% respectively) and sales turnover (+8% / +20% respectively).

Core NTE	Establishments FY23 (change FY22-23)	Employment FY23 (change FY22-23)	Sales turnover FY23 (change FY22-23)	Metric trend (FY18 to FY23)
 Drink	9,420 (-0.4%)	128,020 (+4%)	\$25,185m (+15%)	
 Leisure & Entertainment	41,410 (+1%)	264,880 (+7%)	\$53,915m (+20%)	
 Food	80,455 (-0.5%)	719,455 (+5%)	\$94,943m (+20%)	
Retail & Accommodation (subset of Non-Core NTE)				
 Retail	92,242 (-2%)	632,245 (+1%)	\$395,124m (+6%)	
 Accommodation	14,217 (-1%)	117,175 (+3%)	\$16,552m (+37%)	

The NTE in the states and territories

Half the states and territories experienced a decline in Core NTE establishments between 2021/22 and 2022/23, contributing to stabilisation at a national level (-0.1%). On a positive note, five states and territories surpassed pre-pandemic (2018/19) levels of Core NTE employment in 2022/23. This is also true in all locations for sales turnover – even when factoring in inflation.

Despite a loss in establishments, **Victoria** saw the greatest absolute growth in Core NTE employment (+26,125 / +10%), driven by a recovery in Leisure & Entertainment, particularly in *Creative & Performing Arts* – taking the state to 4% above pre-pandemic levels. The **ACT** had the greatest percentage increase in employment (+16%), rebounding from 2021/22's relatively static activity, putting it 17% above pre-pandemic levels due to strong growth in Food.












In **Queensland**, Core NTE establishments increased (+1.3% / +303), bucking the national trend, with increases across all

three sub-sectors in 2022/23. While employment increased slightly, (+3% / +6,820) led by Food and Drink, sales turnover surged by 22% to \$34.9bn.

New South Wales saw establishment numbers remain steady in 2022/23, while employment increased (+6% / +17,545) due to growth in Food (+9% / +14,380). Despite this, employment in the NSW Core NTE remained 9% below pre-pandemic levels.

The **Northern Territory** experienced the largest percentage decline in Core NTE establishments (-3% / -28) – due to losses in the Food sub-sector – but saw employment increase by 7% (+1,255) due to the Leisure & Entertainment sub-sector (+15% / +705).

Both **Tasmania** (-16%) and **Western Australia** (-3%) experienced declines in employment in 2022/23, despite increases in establishments. In Tasmania, this marked the second year of double-digit declines in employment, placing the sector 18% below 2019 levels.

State	 Establishments FY23 (change FY22-23)	 Employment FY23 (change FY22-23)	 Sales turnover FY23 (change FY22-23)
 NSW	44,537 (-0.1%)	310,975 (+6%)	\$52.1bn (+21%)
 VIC	38,882 (-1.4%)	298,350 (+10%)	\$44.0bn (+18%)
 QLD	23,071 (+1.3%)	223,380 (+3%)	\$34.9bn (+22%)
 WA	11,486 (+0.9%)	130,070 (-3%)	\$20.5bn (+17%)
 SA	7,624 (-0.1%)	76,080 (+8%)	\$11.5bn (+15%)
 TAS	2,558 (+3%)	19,520 (-16%)	\$3.5bn (+14%)
 ACT	2,209 (+5%)	34,835 (+16%)	\$4.5bn (+16%)
 NT	863 (-3%)	19,150 (+7%)	\$3.0bn (+16%)

The NTE in the CCCLM participating city councils

Fifteen Local Government Areas (LGAs) participated in this research in 2024. An overview of key NTE findings for each of these city councils is provided below. This is followed by a section for each city council that provides more detail. If your council would like to take part, please [reach out to CCCLM](#).

Just over half of the participating city councils experienced a decline in the number of Core NTE establishments in 2022/23. In Victoria, for example, **Maribyrnong** (-10%), **Yarra** (-6%) and **Melbourne** (-4%) all saw their establishment bases contract. Despite this, all three cities experienced employment and sales turnover growth during the year, due to a recovery in Leisure & Entertainment employment and strong sales in Food and Drink.

While **Sydney** maintains the greatest density of Core NTE establishments in Australia (220 per km²), it follows a similar pattern to the three Victorian cities, **Canterbury Bankstown** and **Darwin** with all experiencing reduced establishment numbers coupled with growth in employment (circa +5%) and strong sales growth – although as noted, this is combined with higher operating costs for businesses.

The strongest establishment growth was in **Newcastle** (+7%), which outperformed state

and national trends driven by a strong increase (+14% / +44) Leisure & Entertainment businesses. **Canberra** (+5%) also saw strong growth in establishments (+5%) which contributed to the greatest employment growth among the fifteen LGAs (+16% / +4,805) – driven by Food.

Hobart (-14%) and **Perth** (-1%) were the only cities to experience a decline in Core NTE

employment in 2022/23, with Hobart's losses primarily in the Food sub-sector. Positively, both cities experienced sales growth.

Adelaide, Brisbane, Parramatta, Penrith and **Willoughby** experienced growth across all key metrics – with Brisbane experiencing the greatest growth in sales turnover of all CCCLM participating councils (+23%) following the state trend.

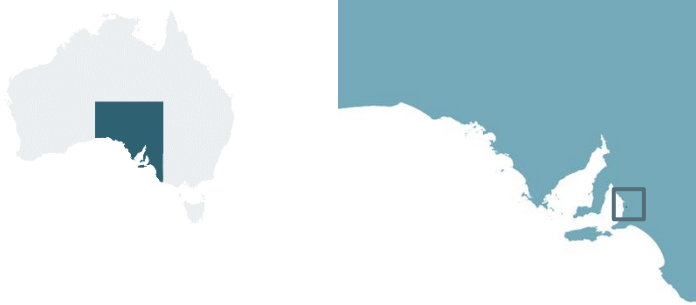
Table 1: Core NTE metrics in the 15 participating LGAs in 2022/23 with change since last year (2021/22)

City LGA	Establishments		Employment (000s)		Sales Turnover (\$bn)		Population (000s)	
	2022/23	% Change 21/22-22/23	2022/23	% Change 21/22-22/23	2022/23	% Change 21/22-22/23	2022/23	% Change 21/22-22/23
Adelaide, SA	994	1%	11.2	8%	\$1.6	16%	27.9	7%
Brisbane, QLD	7,506	1%	75.8	4%	\$11.6	23%	1,323.2	3%
Canberra, ACT	2,209	5%	34.8	16%	\$4.5	16%	466.6	2%
Canterbury Bankstown, NSW	1,736	-5%	8.4	4%	\$1.2	18%	379.8	2%
Darwin, NT	465	-5%	5.5	3%	\$0.9	14%	85.5	1%
Hobart, TAS	638	-1%	6.1	-14%	\$1.0	15%	56.0	0%
Maribyrnong, VIC	729	-10%	3.4	2%	\$0.4	10%	91.8	5%
Melbourne, VIC	2,969	-4%	33.0	8%	\$4.3	20%	177.4	11%
Newcastle, NSW	1,090	7%	14.3	10%	\$2.1	23%	174.3	2%
Parramatta, NSW	1,526	2%	8.7	6%	\$1.5	16%	269.1	3%
Penrith, NSW	714	0%	4.2	5%	\$0.6	20%	224.5	2%
Perth, WA	672	4%	11.2	-1%	\$1.6	21%	32.9	7%
Sydney, NSW	5,896	-1%	36.1	6%	\$5.7	20%	231.1	6%
Willoughby, NSW	671	0%	3.8	5%	\$0.5	19%	77.9	3%
Yarra, VIC	1,559	-6%	9.7	4%	\$1.3	11%	97.4	6%

ADELAIDE SA

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 as Australia's festival city, Adelaide is a member of the UNESCO Creative Cities network and the first and only designated UNESCO City of Music in Australia.





WHERE IS ADELAIDE'S NTE LOCATED?

In the City of Adelaide in July 2024, clusters of Consumer-facing night time business activity can be found trading in the evening (6pm – 9pm):

- Along Hindley Street, through Rundle Mall and along Rundle Street in the East End.
- Around Adelaide Central Market and Gouger Street
- Along Hutt Street; and
- Melbourne Street and O'Connell Street in North Adelaide.

Figure 2 provides an overview of this activity, while a more detailed map can be viewed online [here](#). See 'Using supplementary maps' (p106) for guidance.

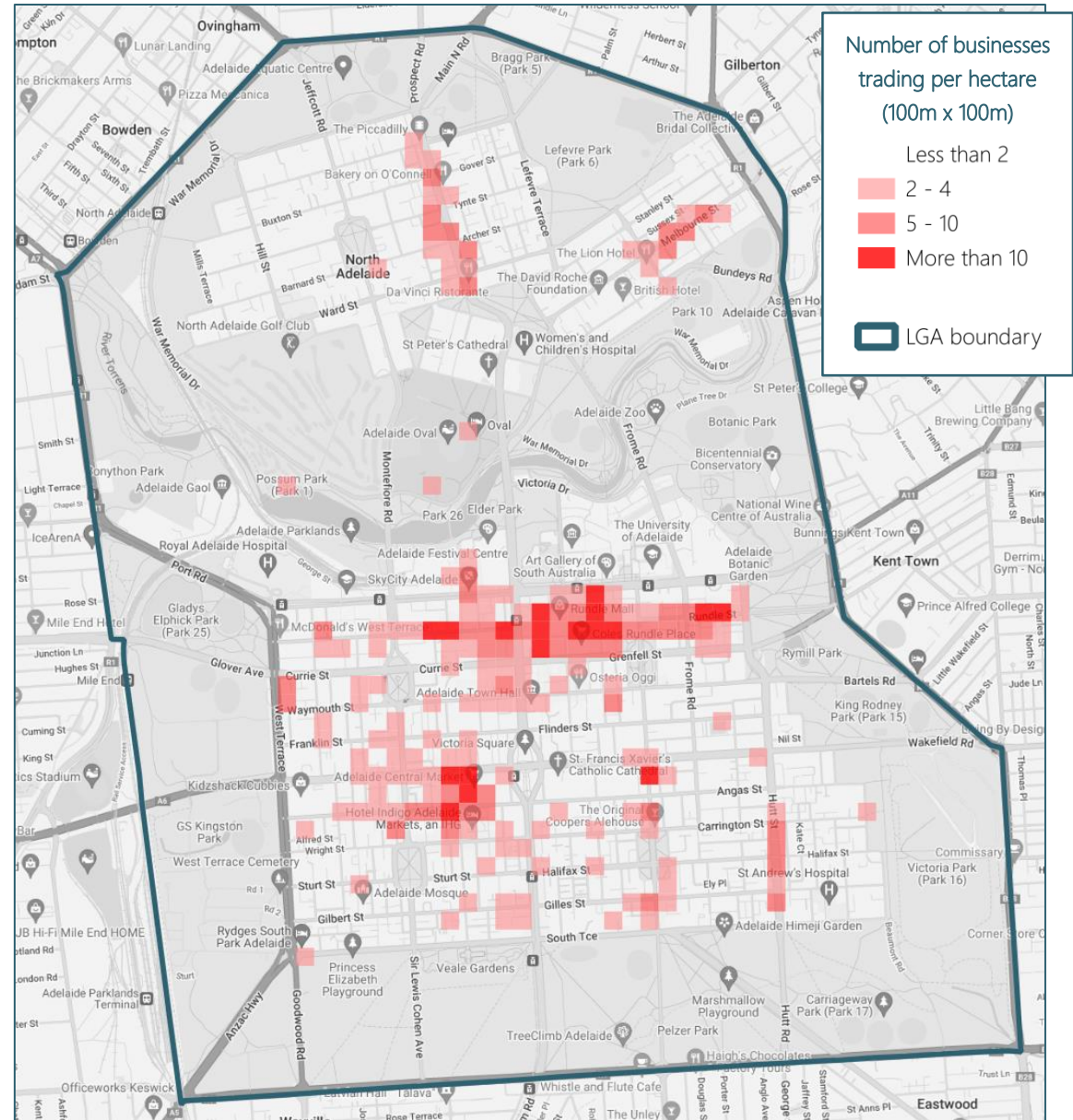


Figure 2: Adelaide's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

ADELAIDE'S CITY INITIATIVES

Together, the City of Adelaide and its subsidiaries the Adelaide Central Market and Adelaide Economic Development Agency (AEDA) have worked to support and grow the city's night time economy during the 2022/23 financial year. Some key initiatives include:

- **Events and Festivals Sponsorship Program** – over \$1.5 million in funding was distributed to support 15 events and festivals that were either predominantly held in the evening or incorporated an element of evening programming.
- **Strategic Events Fund** – provided \$487,000 in sponsorship funding to 13 events and festivals activating the night time economy in recognition of the ongoing challenges that the events industry was facing from the ripple-effects of the pandemic.
- **Project Night Light** – a 12-month pilot project, with 12 licensed venues, from across the city was launched in November 2022. Project Night Light educated staff on women's safety in licensed venues improving Adelaide's

status as a safer city for hospitality staff and visitors to enjoy.

- **East End Unleashed** – each year Rundle Street is closed to traffic on weekend evenings during the Festival Season (17 February to 19 March 2023) to create a seamless visitor experience and ensure traders benefit from the increased visitation. Over 40 hospitality businesses participated in the opportunity to extend their outdoor dining into the street in 2023. Of businesses surveyed, 55% reported an increase in turnover of more than 20% compared to other times of the year.
- **Partnership with Music SA** – each Friday night the Adelaide Central Markets hosted a musician in partnership with Music SA to enhance the Markets late night shopping and dining experience.
- **Unseen** – involved theatrical work by a local fire art creative company Dragon Mill which successfully increased foot traffic in the West End by an average of 34% in weekends throughout June 2023 compared to June 2022.
- **Accommodation Campaigns** – AEDA partnered with the South Australian Tourism Commission to promote the city

through Wotif, Accor and TripAdvisor, delivering four tourism partnership campaigns. Across the campaigns, bookings of more than 35,000 room nights were generated.

- **Friday Night Live** – assisted 16 live music venues to pay for musicians and other services, in order to support the return of live music in venues through seed funding of up to \$6,000 to city businesses to initiate or reignite a live music program in the UNESCO City of Music.
- **Fees** – were waived for land use and hire of events and festivals, in support of businesses still recovering from COVID from August 2021 to October 2023.

Since the 2022/23 financial year the City of Adelaide has continued to be proactive in developing its economy. This includes through the research and drafting of an Economic Development Strategy, which highlights the importance of the night time economy, creative and festival sectors for Adelaide.

ADELAIDE'S NTE PERFORMANCE

Adelaide's Core NTE has shown steady establishment growth from 2019 to 2023, with the number of businesses increasing from 842 to 994, reflecting an 18% increase – matching the national average growth rate over this period.

Core NTE employment in Adelaide reached 11,190 workers in 2023, marking an 8% increase from the previous year and indicating recovery to near pre-pandemic levels. Adelaide's Core NTE generated \$1.6 billion in sales turnover in 2022/23, a 16% increase compared to the prior year.

In 2022/23, the Core NTE constituted 8% of all establishments, 11% of employment, and 4% of sales turnover in Adelaide's overall economy, underscoring the importance of its economic contribution.

Core NTE overview




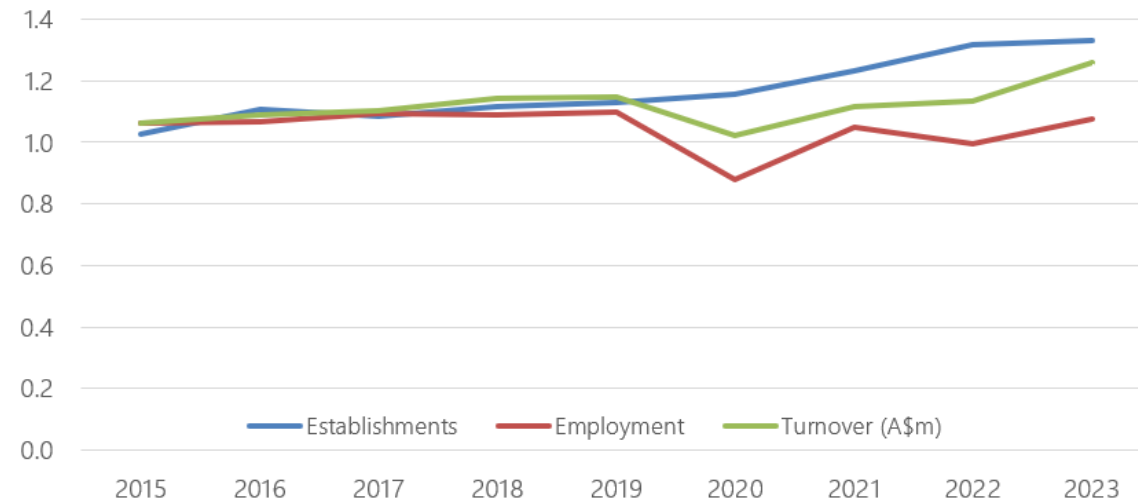
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	994 +1%	8%
 Employment	11,190 +8%	11%
 Sales Turnover	\$1,569m +16%	4%

Figure 3: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Drink** sub-sector showed notable growth, with the number of establishments increasing by 15% to 171, and employment rising by 14% to 2,335 employees. This sub-sector also saw a 21% increase in sales turnover, reaching \$293 million.




Leisure & Entertainment had a modest 5% increase in the number of establishments, totalling 149 in 2023. Despite this growth, employment slightly declined by 3% to 1,405 employees. The sub-sector's sales turnover, however, rose by 12%, reaching \$295 million, due to strong performance in *Creative & Performing Arts*.

The **Food** sub-sector faced challenges with a 3% decrease in the number of establishments, dropping to 674. Despite this, employment grew by 9% to 7,450 employees, and sales turnover increased by 15% to \$982 million, with strong demand for both *Cafes & Restaurants* and *Takeaways*.



The **Retail** sub-sector experienced a 7% decline in the number of establishments, reducing to 425 in 2023 and employment also slightly decreased by 1% to 3,640 employees. Nonetheless, sales turnover saw a 3% increase, growing to \$1,815 million.

The number of **Accommodation** establishments grew by 9% to 95, with employment rising by 8% to 1,530 employees. This sub-sector witnessed the highest growth in sales turnover, with a 28% increase, reaching \$422 million.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	171 +15%	17%
 Entertainment	149 +7%	15%
 Food	674 -3%	68%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change FY22-23
 Retail	425	-7%
 Accommodation	95	+9%

ADELAIDE'S TRADING PATTERNS

In 2024, Friday continues to be Adelaide's strongest trading day driven by an increased number of evening Non-Grocery Retail and Food offerings and a high level of Food establishments being open. Like 2023, over half of Retail businesses are trading 6pm-9pm on a Friday night. This pattern of strong Friday trading is most similar to that of City of Perth.

The Core NTE continues to host strong trading hours across Wednesday to Saturday, with the proportion of all businesses trading 6pm to 9pm varying between 55% and 66%. Friday and Saturday see almost half the Core NTE establishment base trading between 9pm and 12am.

Figure 4: Number of businesses open at night (at some point 6pm and 6am)

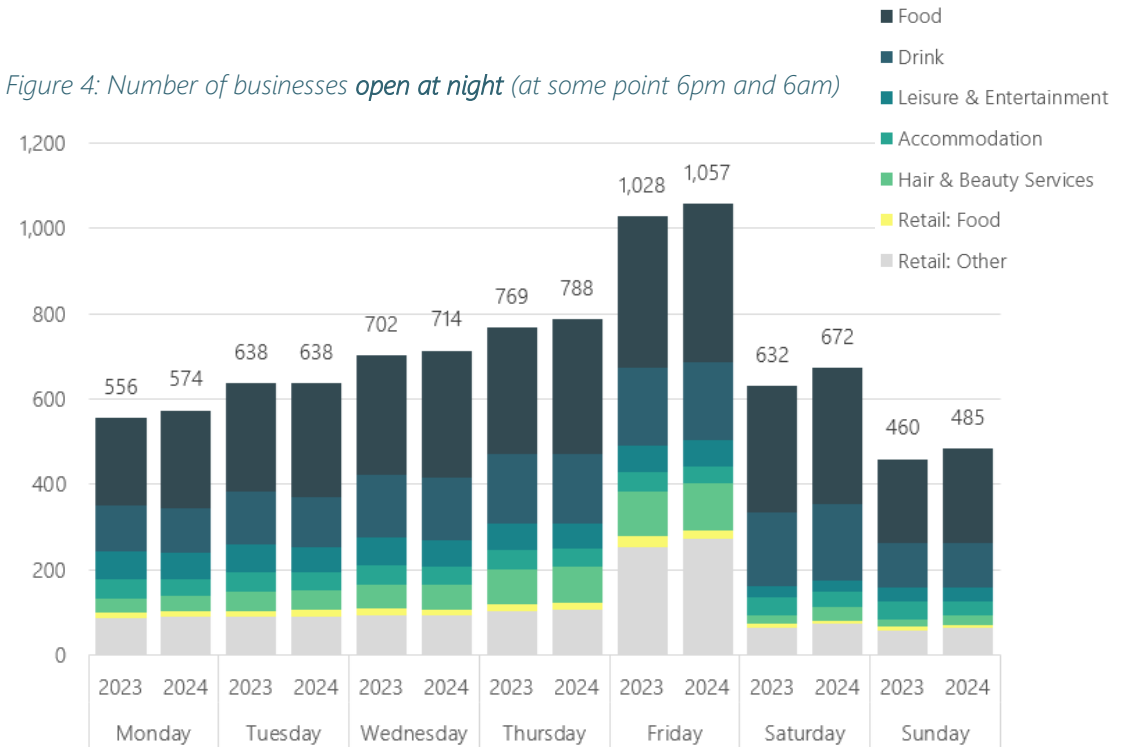


Figure 5: Proportion of all Core NTE businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	43%	28%	8%	6%
Tuesday	48%	32%	8%	6%
Wednesday	55%	37%	9%	6%
Thursday	59%	39%	10%	6%
Friday	66%	47%	18%	7%
Saturday	56%	47%	20%	8%
Sunday	38%	25%	8%	6%

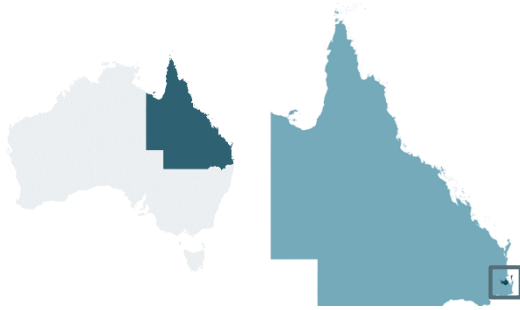
Figure 6: Proportion of all Retail businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	18%	11%	8%	8%
Tuesday	18%	11%	8%	7%
Wednesday	19%	11%	8%	8%
Thursday	21%	11%	8%	8%
Friday	51%	12%	9%	8%
Saturday	14%	11%	8%	7%
Sunday	12%	9%	7%	7%



BRISBANE QLD

Brisbane is a diverse and vibrant city, with an extensive geographic footprint. Brisbane is on the runway to hosting the Brisbane 2032 Olympic and Paralympic Games and is focused on enabling the significant economic benefits the Games will provide to boost tourism and deliver health, volunteering and community benefits.



WHERE IS BRISBANE'S NTE LOCATED?

Brisbane City Council covers a vast geographic area, with many clusters of consumer-facing night time business activity. In July 2024, the densest of these clusters continue to be within the CBD, Fortitude Valley and the West End.

Other concentrations of activity exist around retail centres:

- Indooroopilly Shopping Centre,
- Mount Ommaney Centre,
- Westfield Chermside,
- Westfield Carindale; and
- Westfield Mount Gravatt.

Figure 7 provides an overview of this activity, while a more detailed map can be viewed online [here](#). See 'Using supplementary maps' (p106) for guidance.

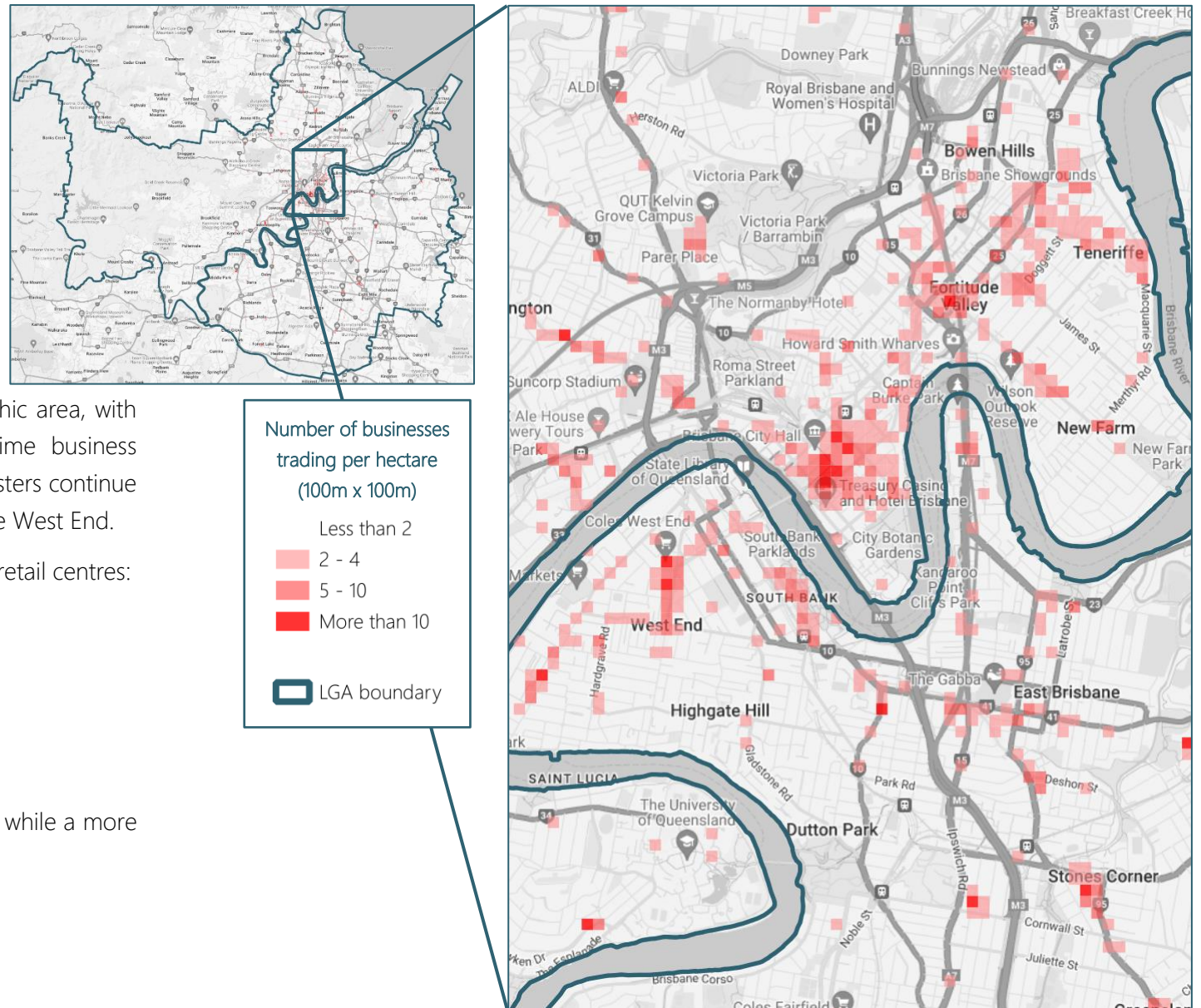


Figure 7: Brisbane's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

BRISBANE'S CITY INITIATIVES

Brisbane City Council has been taking action to support Brisbane's night time economy by delivering on a number of initiatives supporting the key priorities of Brisbane's Economic Development Plan 2031 to enrich Brisbane's lifestyle and build Brisbane's global reputation. This includes supporting a vibrant, creative economy within Brisbane's inner city and key cultural precincts and encouraging residents and visitors to discover local lifestyle, businesses, places and experiences.

To deliver on its commitment to growing Brisbane's night time economy, Brisbane City Council works to:

- Better understand community trends, needs and motivations for night time activities, events and experiences
- Understand challenges for business and partnership opportunities that could strengthen the Brisbane night time economy
- Identify opportunities that Council can consider facilitating, providing, partnering, funding, regulating and

advocating toward a vibrant, diverse and sustainable night time economy.

During 2022/23, Brisbane City Council continued to support the growth of Brisbane's night time economy by delivering initiatives and promoting all that the city and suburbs have to offer after dark. Examples include:

- Supporting night time events and activities including Valley Fiesta and BrisAsia Festival and promoting these events through the What's On in Brisbane calendar and Brisbane app
- Seasonal marketing campaigns to support city centre traders
- Delivering the third Dine BNE City program of offers and events as a celebration of the city's culinary scene
- Delivering the 40th birthday celebration of Brisbane's iconic Queen Street Mall featuring performances, pop up bars and fashion shows
- Removing or reducing permit fees for events and festivals to encourage free and affordable fun through the streamlined Events Local law 2022

- Activating the city and precincts with creative lighting and supporting the installation of bud lighting in street trees in business areas to create attractive night time streetscapes
- Delivering ongoing safety initiatives including Public Space Liaison Officers, safety audits and CitySafe camera network
- Supporting local organisations and communities to activate public spaces, particularly through grant and festival funding
- Encouraging suburban retail precincts to apply for precinct promotion and activation sponsorship to deliver events that support the night time economy
- Providing evening discount parking rates at King George Square and Wickham Terrace car parks, with 131,988 vehicles using the evening discount rates in 2022/23
- Promoting things to do after dark around Brisbane and tours such as the Brisbane Greeters' twilight tours.

BRISBANE'S NTE PERFORMANCE

Brisbane's Core NTE continued to show impressive performance into 2023. During the 2022/23 period, the city reported a significant 23% increase in sales turnover, reaching \$11.6 billion and underscoring the sector's robust post-pandemic performance, totalling 37% growth since 2019. Employment in 2022/23 also saw an uptick, increasing by 4% to 75,770, while the number of establishments grew slightly by 1% to 7,506.

Notably, Brisbane's Core NTE contributes substantially to the local economy, accounting for 5% of all establishments, 10% of employment, and 4% of sales turnover. Compared to pre-pandemic levels, Brisbane continues to outpace national averages, highlighting the resilience and growing importance of the NTE in the city's economic landscape.

Core NTE overview




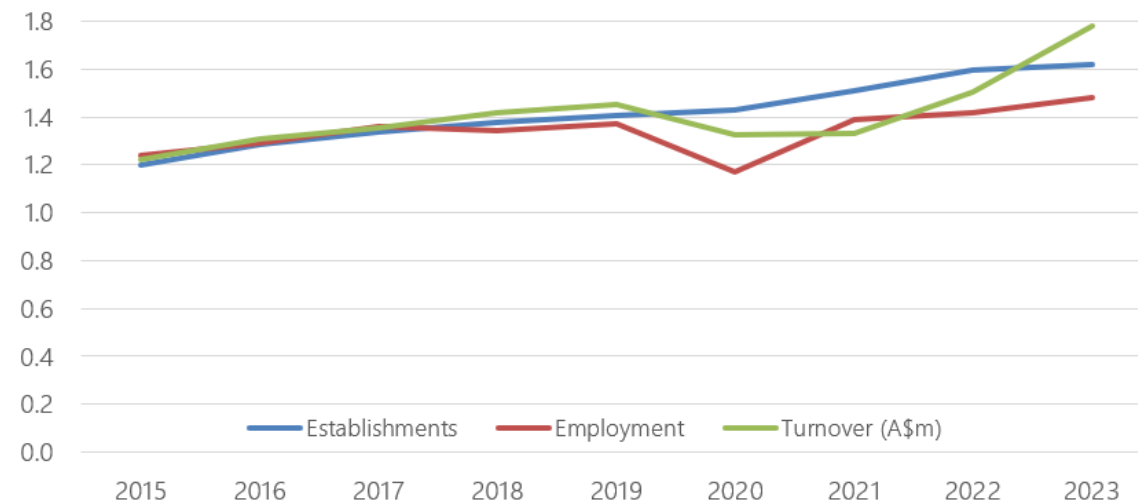
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	7,506 +1%	5%
 Employment	75,770 +4%	10%
 Sales Turnover	\$11,648m +23%	4%

Figure 8: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Drink** sub-sector saw an increase of 4% in establishments, reaching 307, accompanied by a 6% rise in employment to 4,330 workers. Notably, sales turnover grew by 25%, totalling \$591 million – surpassing 2019’s peak for the first time (by 19%).




In **Leisure & Entertainment** there was a 2% increase in establishments to 2,301, while employment rose by 2% to 18,840 employees. Sales turnover surged by 21% to \$3.9 billion, with impressive performances across each industry within the sub-sector.

The **Food** sub-sector experienced a marginal 1% growth in establishments, reaching 4,898, coupled with a 5% increase in employment to 52,605 workers. Sales turnover rose by 24% to \$7.1 billion, underscoring strong consumer demand trends for dine-out options.



Conversely, the **Retail** sub-sector faced challenges with a 2% decline in establishments to 4,787, coupled with a notable 10% decrease in employment to 42,915 workers. Despite these declines, sales turnover experienced a 9% increase to \$16.8 billion in 2023.

Accommodation also experienced decline, with a 3% reduction in establishments to 485, although employment grew by 3% to 7,290 workers. Despite this, sales turnover surged by 42% to \$1.6 billion, returning to pre-pandemic levels, and driven by the lifting of pandemic restrictions and associated rise in staycations.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	307 +4%	4%
 Entertainment	2,301 +2%	31%
 Food	4,898 +1%	65%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	4,787	-2%
 Accommodation	485	-3%

BRISBANE'S TRADING PATTERNS

Business night time trading hours remained steady in Brisbane between July 2023 and July 2024, with Thursday continuing to be the strongest day for late night trading. In 2024, Retail businesses have become slightly less active at night, while Food, Leisure & Entertainment and Drink establishments have become slightly more active. Wednesdays to Fridays are the most active days for the Core NTE, with over 60% of the establishment base trading between 6pm and 9pm. Fridays and Saturdays have the highest levels of early night (9pm to 12am) trading. Early hours trading (3am to 6am) is quite prevalent on weekdays, driven by a high proportion of gyms opening early for the day ahead.

Figure 9: Number of businesses open at night (at some point 6pm and 6am)

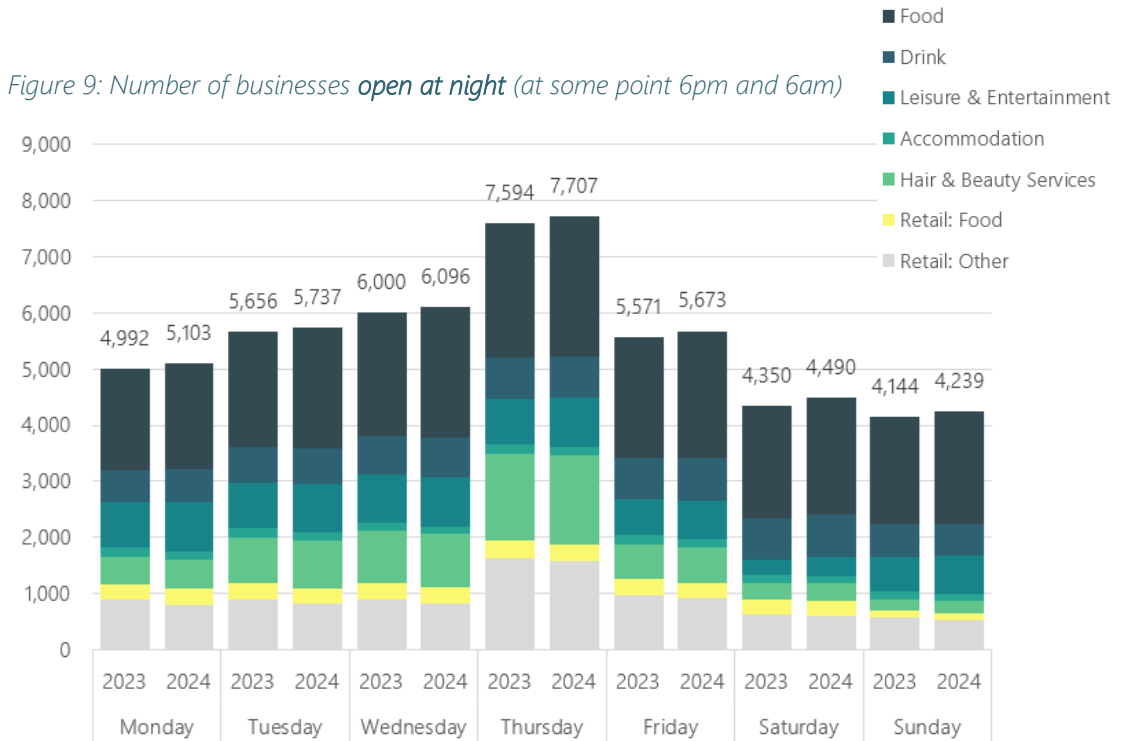


Figure 10: Proportion of all Core NTE businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	51%	19%	8%	19%
Tuesday	56%	21%	8%	20%
Wednesday	60%	23%	8%	20%
Thursday	63%	24%	9%	20%
Friday	60%	29%	10%	11%
Saturday	52%	28%	10%	10%
Sunday	43%	20%	8%	19%

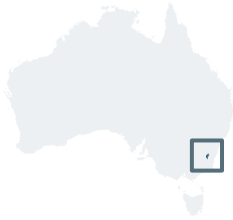
Figure 11: Proportion of all Retail businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	20%	8%	5%	6%
Tuesday	20%	8%	5%	6%
Wednesday	20%	8%	5%	6%
Thursday	35%	8%	5%	6%
Friday	22%	9%	5%	6%
Saturday	16%	8%	5%	5%
Sunday	12%	7%	5%	6%

CANBERRA ACT

The nation's capital, Canberra, is known for its cultural attractions and thriving food and wine scene. The inner-city corridor stretching from Acton, Civic and Braddon, Dickson and inner south suburbs like Kingston house most of the cafes, restaurants, bars and entertainment venues including theatres and cinemas.





WHERE IS CANBERRA'S NTE LOCATED?

The Australian Capital Territory covers a large geographic area, with most of the consumer-facing night time business activity found to the north.

In July 2024, substantial clustering of activity occurs in the city centre, at the location of the proposed special entertainment precinct.

There are additional clusters of evening activity in the surrounding suburbs and towns of:

- Belconnen,
- Gungahlin,
- Phillip (Woden),
- Griffith (Manuka) and
- Greenway (Tuggeranong).

Figure 12 provides an overview of this activity, while a more detailed map can be viewed online [here](#).

See 'Using supplementary maps' (p106) for guidance.

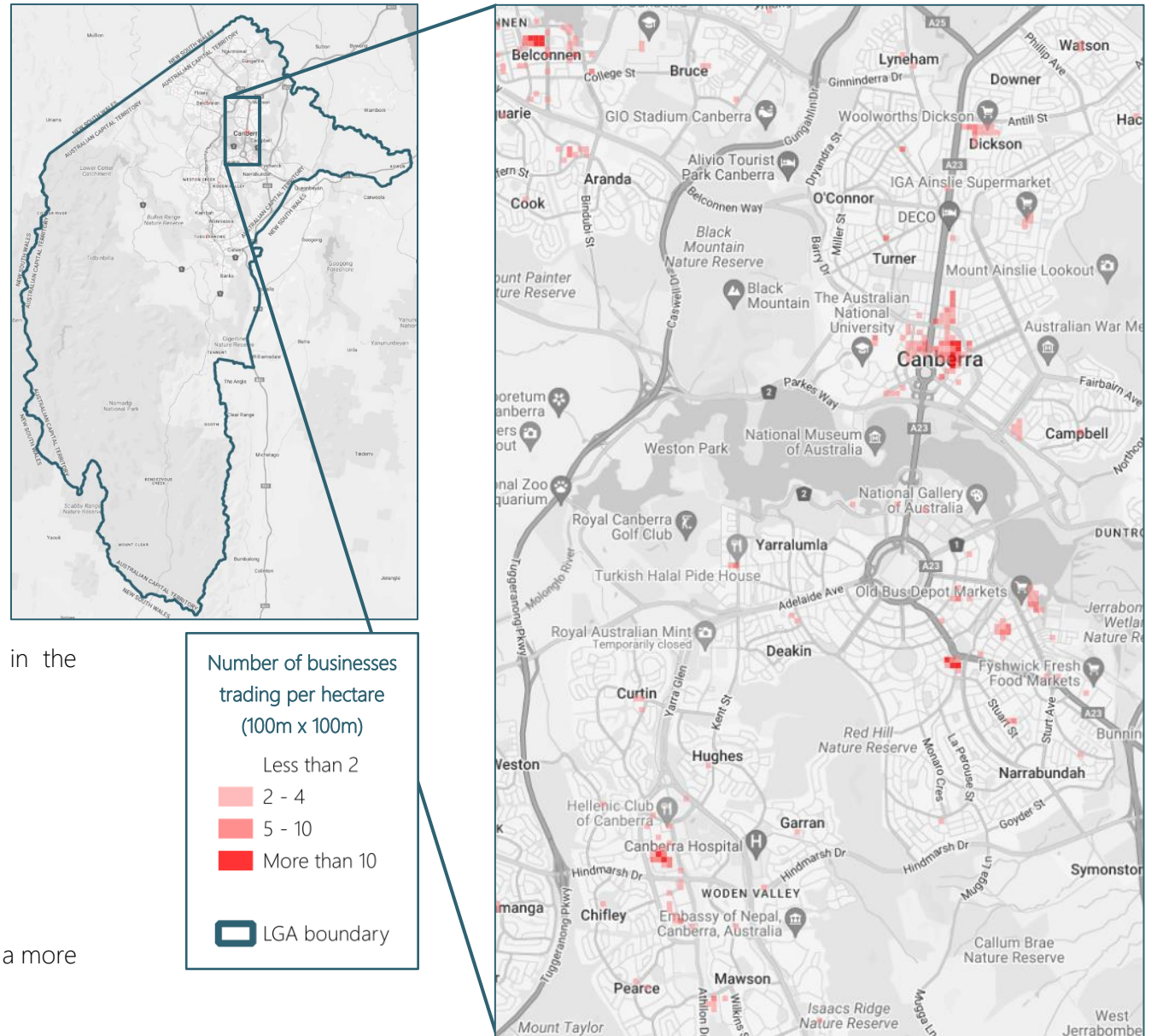


Figure 12: Canberra's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

CANBERRA'S CITY INITIATIVES

The Australian Capital Territory (ACT) Government has committed to developing a vibrant and inclusive night-time economy in Canberra that supports businesses and the community. The [Better Regulation Report: A report on how we are improving business regulation in the ACT](#) was released in 2022 as a response to the COVID-19 pandemic and committed the ACT Government to a review of the legislative, regulatory, policy and process-related components of the night-time economy with a view to undertake reform.

The ACT is now delivering several initiatives to realise the ACT's vision for a vibrant, safe and accessible night-time economy for all Canberrans. On 1 January 2024, the ACT Government:

- reduced annual liquor fees for on licences (restaurant and café) that have an occupancy of 80 people or less by 50 per cent and changed the standard licensed times for these restaurants and cafes from midnight to 2am at no extra cost. These changes aim to support smaller businesses to remain competitive,

incentivise their operation and diversify Canberra's night-time economy offerings;

- reduced annual liquor fees for on licences (bar) with an occupancy of 30 people or less, and general licences with an occupancy of 20 people or less by 80 per cent. These changes reflect licensing fees commensurate with their level of risk and aim to promote innovative small business start-ups that contribute to a diverse night-time economy; and
- reduced an administrative burden on businesses that hold a general liquor licence by removing the requirement to have a separate on area and off area on the premises.

In April 2024, the ACT Government passed the *Liquor (Night-Time Economy) Amendment Act 2024*, enshrining in legislation the ACT Government's commitment to live music, entertainment and tourism. It also provided for more business categories to supply liquor without a licence, where supply is ancillary to the primary service being provided.

Further significant reforms took place in July 2024.

A new City Centre Entertainment Precinct has been introduced, and the Gungahlin Entertainment Precinct has been updated, through the Territory Plan, to protect and encourage entertainment uses in these precincts. This will make setting up an entertainment business, or diversifying entertainment business activity, more appealing in these precincts, while also maintaining the health and wellbeing of residents.

Outdoor dining permits have been improved to make it easier for businesses to provide outdoor dining. Changes introduced in 2023 include offering a one-day turnaround on simple outdoor dining permit applications over the 2023/24 summer period, and further allowed food businesses to use public space adjacent to their premises subject to certain conditions while applications for ongoing use were under consideration.

CANBERRA'S NTE PERFORMANCE

In 2022/23, Canberra's Core NTE showed remarkable growth in several areas as it continued to surpass pre-pandemic figures. Employment in the NTE surged by 16%, reaching 34,835 workers, while the number of establishments increased by 5% to 2,209. This was driven by a strong rise in sales turnover of 16%, totalling \$4.5 billion.

These gains indicate a thriving NTE sector that now represents 6% of all establishments, 14% of employment, and 6% of sales turnover in Canberra's economy in 2022/23.

Core NTE overview




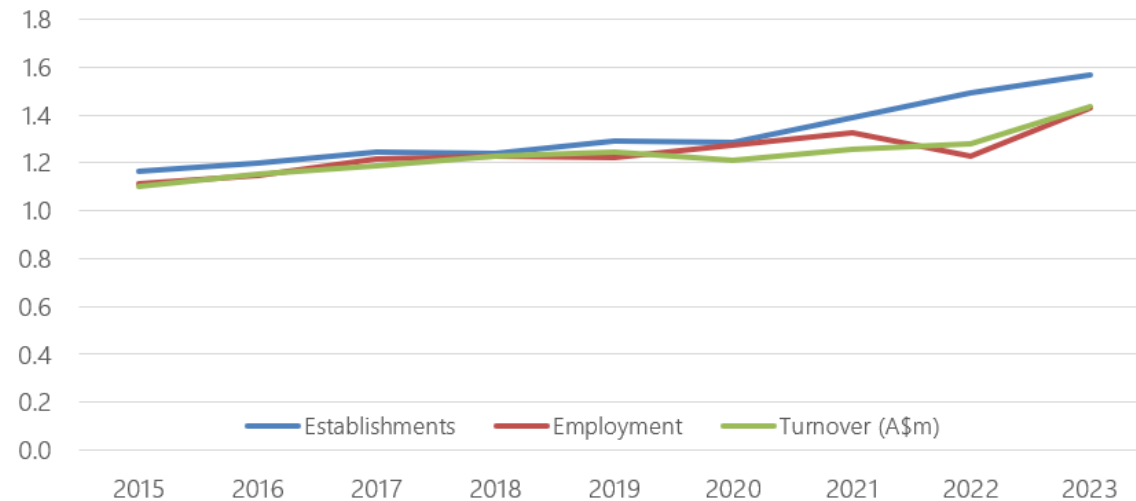
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	2,209 +5%	6%
 Employment	34,835 +16%	14%
 Sales Turnover	\$4,466m +16%	6%

Figure 13: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



* Caution should be applied to the 2022 employment results in this section, given the small sample size of the ABS' Labour Force Survey for the ACT. See the appendix for more information.

SUB-SECTORAL PERFORMANCE

The **Drink** sub-sector experienced a modest decline of 3% in establishments in 2023, totalling 129, while employment grew by 9% to 2,500 workers and sales turnover increased 6% to \$403 million – led by strong performance of *Pubs, Taverns & Bars*.




In the **Leisure & Entertainment** sub-sector, there was a 4% increase in establishments to 521 alongside a 4% rise in employment to 6,585 employees. Sales turnover expanded significantly by 16% to \$1.2 billion, driven by strong growth in *Creative & Performing Arts activities* and *Sports & Physical Recreation activities*.

The **Food** sub-sector demonstrated robust growth, with a 6% rise in establishments to 1,559 and a substantial 20% increase in employment to 25,750 workers. Sales turnover also surged by 18% to \$2.8 billion, underscoring strong demand for dining-out options.



The **Retail** sub-sector also experienced solid growth, with a 3% increase in establishments to 1,053 coupled with a 5% rise in employment to 13,650 workers. Sales turnover expanded by 4% to \$7.8 billion, indicating moderate consumer spending patterns.

Accommodation experienced notable expansion, with a 10% increase in establishments to 102, and a substantial 22% rise in employment to 3,340 workers. Sales turnover also saw a strong increase of 34% reaching \$392 million in 2023.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	129 -3%	6%
 Entertainment	521 +4%	24%
 Food	1,559 +6%	71%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	1,053	+3%
 Accommodation	102	+10%

CANBERRA'S TRADING PATTERNS

Friday continues to be the most active trading night in Canberra in 2024 – following similar trading patterns to Melbourne, Perth, and Darwin. In July 2024, Food and Hair & Beauty Services contributed to strong participation across all nights, while Retail business activity increased Friday only. For the Core NTE, Tuesdays through to Fridays see the most activity (57%-61% open) during the early evening (6pm-9pm). Retail follows similar patterns to the Core NTE with the proportion of these businesses open between 6pm and 9pm peaking at 45% on Fridays.

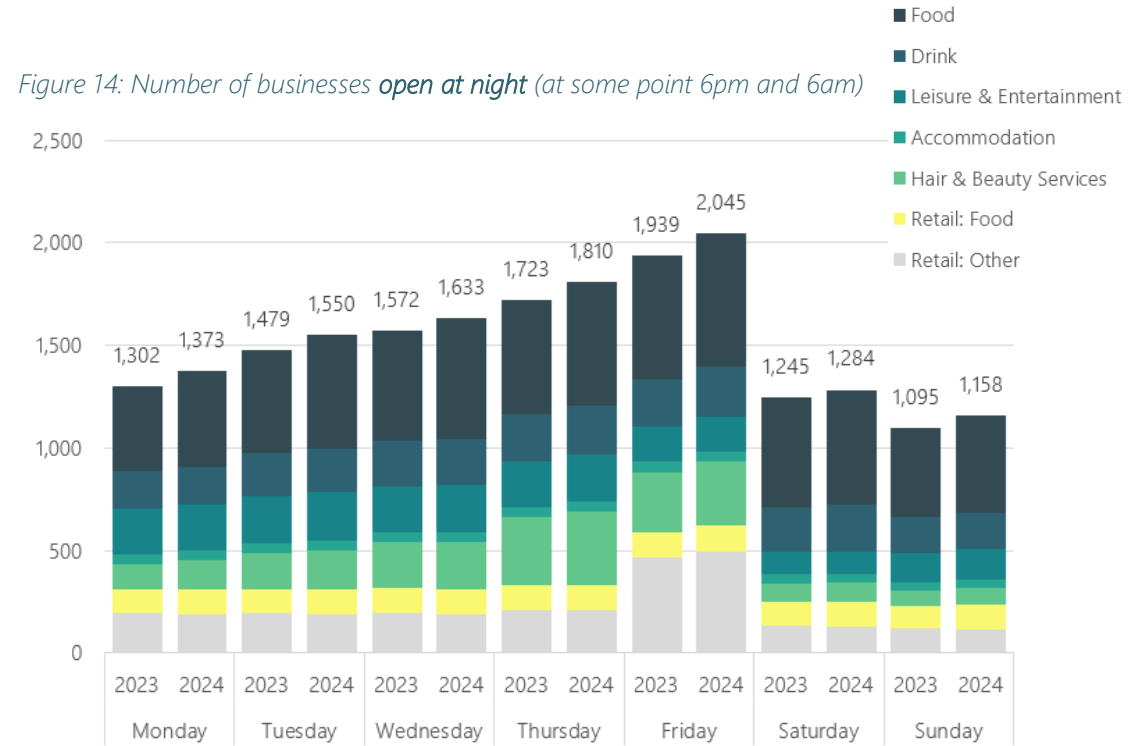


Figure 15: Proportion of all Core NTE businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	50%	20%	6%	10%
Tuesday	57%	24%	7%	10%
Wednesday	59%	26%	7%	10%
Thursday	61%	28%	8%	10%
Friday	60%	32%	9%	8%
Saturday	51%	30%	9%	7%
Sunday	43%	21%	6%	10%

Figure 16: Proportion of all Retail businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	23%	8%	3%	3%
Tuesday	23%	8%	3%	3%
Wednesday	23%	8%	3%	3%
Thursday	24%	8%	3%	3%
Friday	45%	8%	4%	3%
Saturday	18%	8%	3%	3%
Sunday	17%	7%	3%	3%



CANTERBURY- BANKSTOWN NSW

The City of Canterbury-Bankstown (CBCity) is a vibrant hub of night-time activity supported by Council through a series of strategic initiatives aimed at fostering a dynamic, safe and economically prosperous environment for residents and visitors alike.



WHERE IS CBCITY'S NTE LOCATED?

In CBCity in July 2024, there are several clusters of consumer-facing night time business activity across the LGA, including:

- Bankstown Central and along Chapel Road,
- Lakemba along Haldon Street,
- Campsie along Beamish Street, and
- Belmore along Burwood Road.

Some smaller pockets of activity can be found around:

- Roselands Shopping Mall,
- Bass Hill Plaza and
- Waldron Road in Chester Hill.

Figure 17 provides an overview of this activity, while a more detailed map can be viewed online [here](#).

See 'Using supplementary maps' (p106) for guidance.

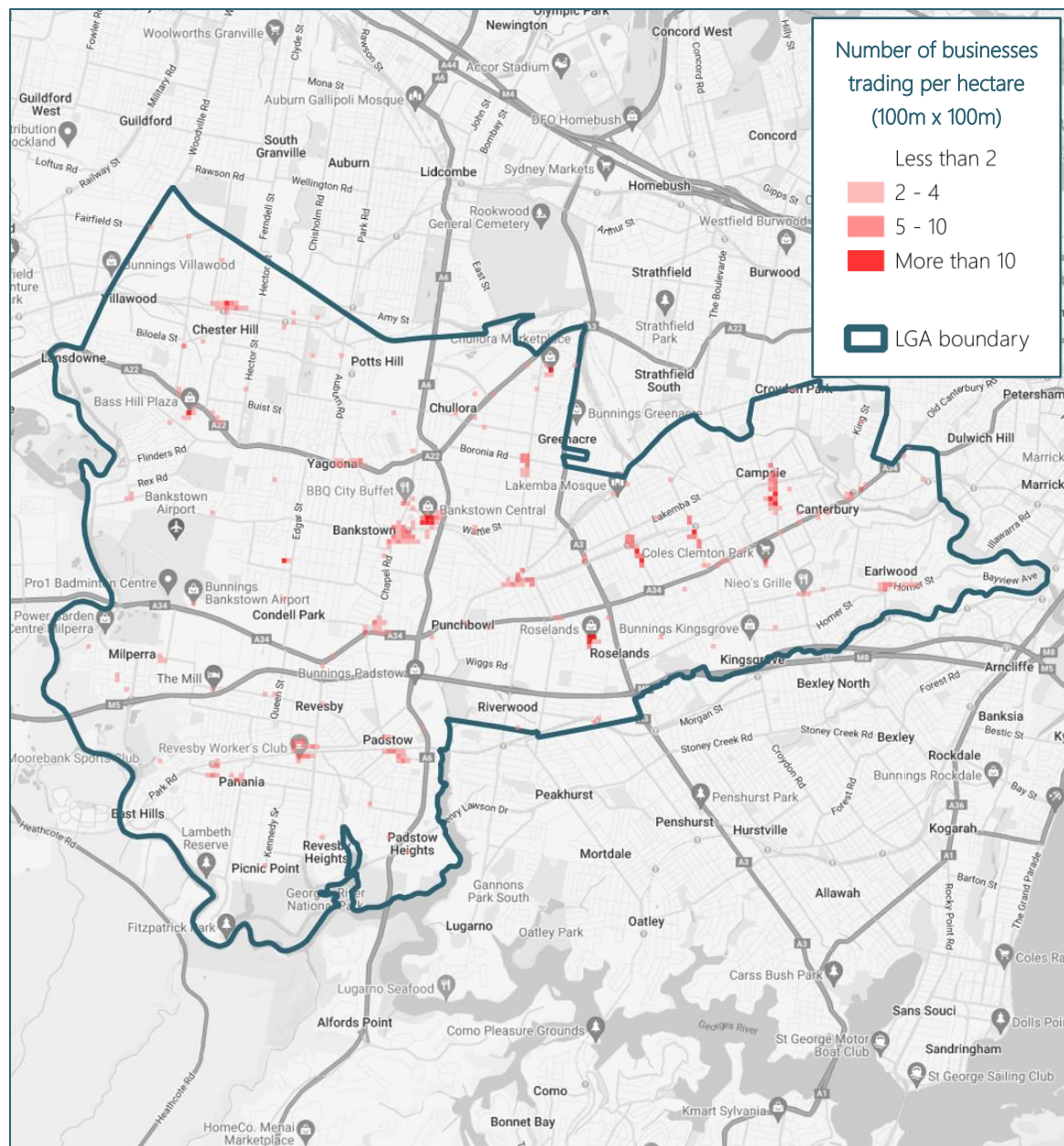


Figure 17: CBCity's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

CBCITY'S INITIATIVES

Canterbury-Bankstown is a vibrant hub of night-time activity supported by Council through a series of strategic initiatives aimed at fostering a dynamic, safe and economically prosperous environment for residents and visitors alike. A primary focus is on supporting night-time businesses with economic incentives and Council grants designed to reduce operational costs, encourage new startups and foster innovation within the night-time economy. Regulatory reforms are being implemented to streamline licensing processes and extend trading hours, creating a more business-friendly environment that helps businesses to thrive and contribute significantly to the local economy.

Ensuring safety and security is critical to attracting visitors to Canterbury-Bankstown. Planned upgrades to street lighting in key areas aim to enhance the safety for night-time patrons, increasing public confidence and deterring antisocial behaviour. Additionally, an increased police presence, with additional patrols and security personnel, monitor and manage night-time activities, particularly in

high-traffic zones, to maintain public order and safety.

Collaboration with transport providers to extend service hours are making it easier for people to travel to and from night-time venues, promoting accessibility and convenience. The new metro upgrades will mean people travelling on the T3 line will have a service every 4 minutes during peak times and will save some travellers up to 25 minutes in travel. The development of safer pedestrian pathways and better signage further facilitates easier movement within the City at night, enhancing the overall night-time experience for residents and visitors.

Cultural and recreational activities are fostered to attract diverse crowds and create a lively night-time atmosphere. Regular events such as cultural festivals, live music and food markets activate Canterbury-Bankstown's spaces together with pop-up installations, street performances and outdoor cinema screenings, bringing life to urban areas and providing entertainment options for all age groups. Ramadan Nights Lakemba is a signature event that brings over 1.5 million people from all over the country and is

exclusively held from night 'till the early morning.

Community engagement and inclusivity are always prioritised. Engaging with business owners, community groups and residents has been essential to gather input and foster a sense of ownership and pride within the community. This collaborative approach ensures that initiatives meet the needs of all residents. Inclusive night-time activities that cater to a wide demographic, including families, youth and elderly residents are promoted to ensure everyone can enjoy the night-time economy.

Marketing and promotion are utilised through strategic marketing and media campaigns encouraging others to share Canterbury-Bankstown's night-time economy, highlighting unique offerings and attracting visitors from surrounding areas. Partnerships with local media outlets help spread awareness about night-time events and initiatives, increasing their reach and impact. These initiatives collectively are supporting Canterbury-Bankstown's bustling night-time economy and aim to foster growth in this space to ensure a vibrant, safe and economically thriving area.

CBCITY'S NTE PERFORMANCE

Canterbury Bankstown's Core NTE posted a small decline in establishments but employment and sales revenue increased in 2022/23. The number of establishments decreased 5% to 1,736, while employment grew by 4%, expanding to 8,390 workers, and sales turnover saw a notable 18% increase, reaching \$1.2 billion, surpassing pre-pandemic levels.

As a result, Canterbury-Bankstown's Core NTE represents 4% of all establishments, 6% of employment, and 2% of sales turnover.

Core NTE overview




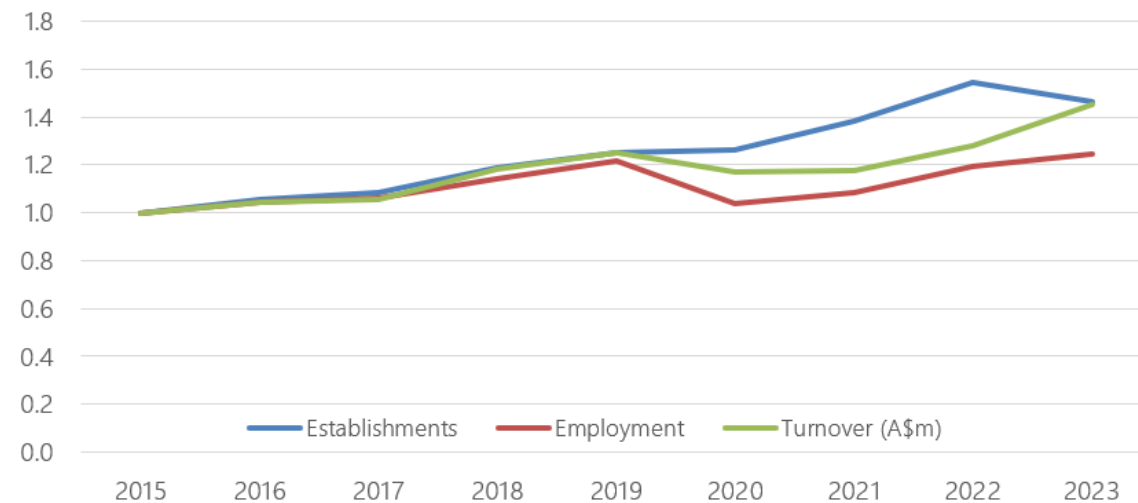
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	1,736 -5%	4%
 Employment	8,390 +4%	6%
 Sales Turnover	\$1,183m +18%	2%

Figure 18: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

Drink establishments experienced a 5% decrease to 78, despite a 6% increase in employment to 915 workers. Sales turnover rose by 15% reaching \$186 million, with *Pubs, Taverns & Bars* significantly contributing to this performance.

Leisure & Entertainment showed mixed results – with a slight decline of 2% in establishments (to 393) and an equivalent decline in employment dropping to 1,925 workers. However, sales turnover increased markedly by 16% to \$282 million, with *Clubs (Hospitality), Creative & Performing Arts* and *Sports and Recreational activities*, representing 78% of the gain.




Establishments in the **Food** sub-sector experienced declines across *Cafes & Restaurants* and *Takeaway Food Services*, leading to a 6% reduction in 2023 (to 1,265).

However, employment in the sector saw a 6% rise, increasing to 5,550 workers. Sales turnover grew significantly by 19% to \$714 million, reflecting strong consumer demand in dining and takeaway services.



Retail establishments in Canterbury Bankstown decreased by 3% to 1,709, with employment remaining stable at 6,705 workers. Sales turnover increased by 8% to \$2.3 billion in 2023.

The **Accommodation** sub-sector maintained its establishments base in 2023 (24 total), but employment surged by 33% to 80 workers and sales turnover increased notably by 59% to \$14 million, surpassing pre-pandemic levels and supported by the lifting of pandemic restrictions and associated rise in staycations.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	78 -5%	4%
 Entertainment	393 -2%	23%
 Food	1,265 -6%	73%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	1,709	-3%
 Accommodation	24	0%

CBCITY'S TRADING PATTERNS

In Canterbury-Bankstown, the proportion of business operating at night is higher than in many of the other cities reviewed, with Tuesdays through to Saturdays all seeing +62% of Core NTE businesses operating in the evening, and +36% into the early night. Early hours trading sees strong activity, driven by early morning cafes. Thursday is the most active trading evening, due to strong activity in Non-Grocery Retail, and Hair & Beauty Services, which account for almost half of all businesses open (49%). Saturdays and Sundays are the two least active days, with fewer Leisure and Entertainment, Hair & Beauty Services, and Non-Grocery Retail businesses open driving this.

Figure 19: Number of businesses open at night (at some point 6pm and 6am)

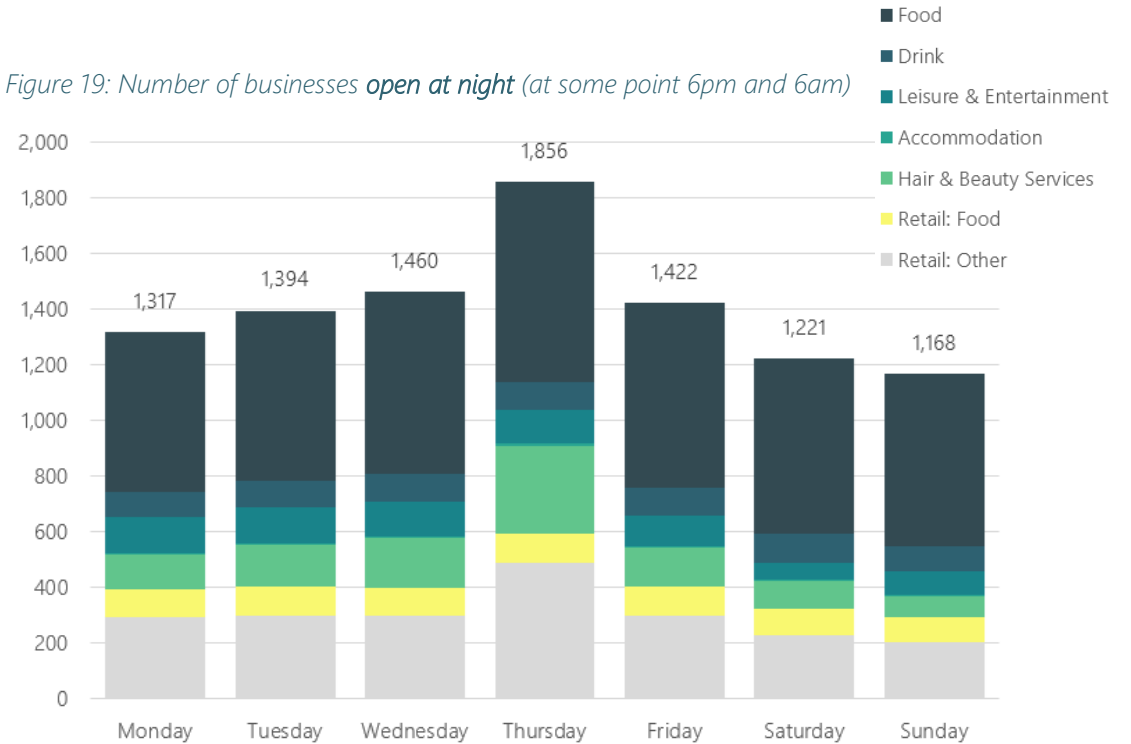


Figure 20: Proportion of all Core NTE businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	59%	34%	11%	17%
Tuesday	62%	36%	11%	17%
Wednesday	66%	38%	11%	17%
Thursday	71%	40%	11%	17%
Friday	67%	42%	12%	13%
Saturday	62%	42%	12%	10%
Sunday	56%	36%	8%	15%

Figure 21: Proportion of all Retail businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	26%	12%	5%	6%
Tuesday	27%	12%	5%	6%
Wednesday	27%	12%	5%	6%
Thursday	40%	12%	5%	6%
Friday	27%	13%	6%	6%
Saturday	22%	12%	5%	5%
Sunday	19%	11%	5%	6%

DARWIN NT

A multicultural and modern city, Darwin has been described as Australia's gateway to South East Asia. The Larrakia people, its traditional owners, 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.





WHERE IS DARWIN'S NTE LOCATED?

In July 2024, the City of Darwin's consumer-facing night time business activity are most active in the evening (6pm to 9pm) around the CBD, to the south of the LGA.

Other pockets of activity can be:

- Around Casuarina Square Shopping Mall and Casuarina Village Shopping Centre, and
- At the Hibiscus Shopping Centre in Leanyer.

Figure 22 provides an overview of this activity, while a more detailed map can be viewed online [here](#).

See 'Using supplementary maps' (p106) for guidance.

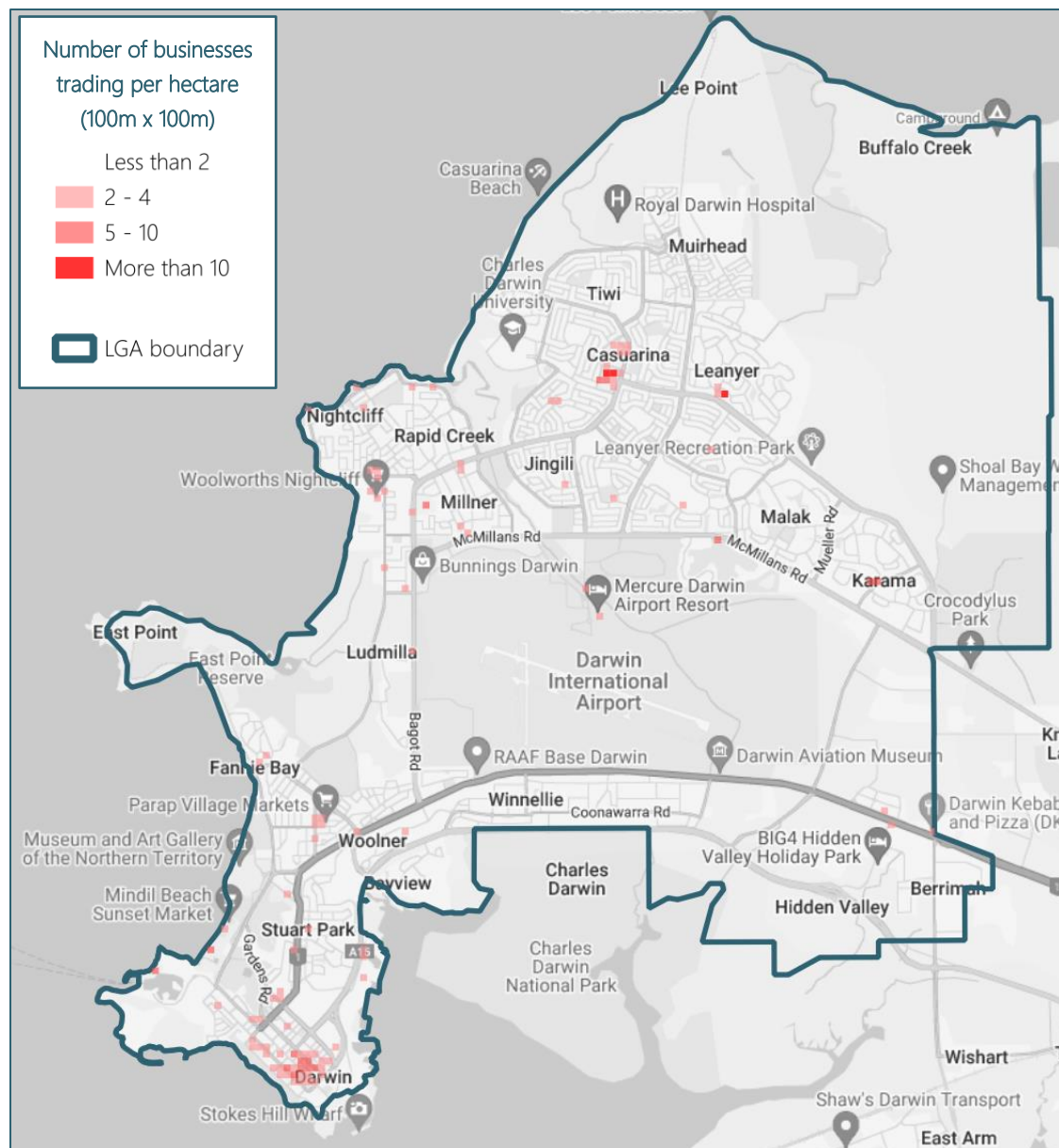


Figure 22: Darwin's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

DARWIN'S CITY INITIATIVES

City of Darwin has taken actions to enhance Darwin's NTE by delivering initiatives under the 2030 Economic Development Strategy. Key initiatives undertaken in 2022/23 have included:

- Successfully hosting major events such as the Darwin International Dragon Boat Festival and International Trade Show, which attracted 120 delegates from Darwin's Sister and Friendship Cities and drew more than 4,000 spectators on race day (Gross Regional Product was estimated to have increased by \$447k).
- Endorsing a new in-kind Support Policy which aims to support the community by providing a range of in-kind equipment, facilities, services, and programs.
- Publishing a Laneways and Small Streets Activation Guide to facilitate upgrades and revitalisation efforts, notably in Chapel Lane, aimed at creating an appealing and vibrant environment for the Darwin community.
- Installing the first Parklet with funding from a Northern Territory Tourism Towns Asset Grant, thereby enhancing local

business capacity for trade and community activation.

- Supporting 26 outdoor dining venues to activate public spaces and enhance outdoor activity across the municipality to stimulate the local economy.
- Approving 149 comprehensive event permits and 237 small event permits, which activate public places and foster local businesses engagement, thereby increasing local expenditure.
- Achieving a record of 26 vendors for the Street Food Program, many of whom trade during evening hours.
- Organising the Christmas Pageant Parade and Christmas Tree Lighting events, drawing over 15,000 attendees. Hosting other major events including Australia Day and Bombing of Darwin.
- Provided \$668,745 in sponsorship funding to local organisations, with outcomes including attracting 405,000 visitors to Darwin, contributing to Gross Regional Product by \$38.4 million and supporting 330 jobs.

These initiatives have led to an increase in Darwin's night time commercial activity, with a total of 187k hours spent in commercial

properties in 2022/23. July and August are the busiest months, especially on Saturday evenings from 6pm to 8pm. Mitchell, Smith and Cavanagh Street see the greatest surge in activity.

Other initiatives operated by the City of Darwin to support the NTE include:

- Production of Discover Darwin Podcasts featuring 'Saltwater Stories of the Larrakia, guiding listeners through storytelling to discover the land and sea, community and culture from the traditional owners and custodians of Darwin.
- Delivered the Larrakia Tourism Incubator Program to promote Darwin as a destination known for its Larrakia people, culture, and landmarks to extend the 'tourism season' by creating unique sensory experiences (sight, sound, taste, scent, spirit and being)
- Establishing the Discover Darwin Australia LinkedIn platform and redesigning the Discover Darwin website based on feedback, providing a public resource with information about living, working, studying, and investing in Darwin.

DARWIN'S NTE PERFORMANCE

Darwin's Core NTE showcased strong growth in for the 2022/23 period, with a 14% increase in sales turnover (to \$853m), despite a 5% decline in establishments (to 465). Darwin's NTE has shown substantial sales turnover growth from over the past decade (averaging 6% per annum).

Compared to pre-pandemic levels, employment remained steady at 5,545, although still marginally down from the 2017 peak (-2%). As a result, Darwin's Core NTE comprises 6% of all establishments, 10% of employment, and 4% of sales turnover in the local economy in 2023.

Core NTE overview




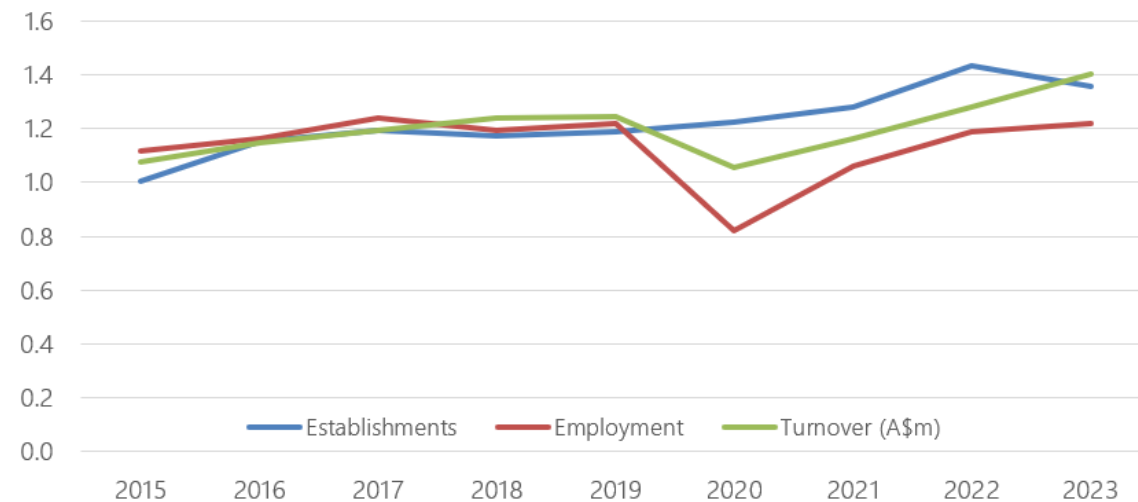
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	465 -5%	6%
 Employment	5,545 +3%	10%
 Sales Turnover	\$853m +14%	4%

Figure 23: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Drink** sector experienced robust growth with a 25% increase in 2023 to 30 establishments, accompanied by a 5% rise in employment to 490 workers. Sales turnover increased by 17% to \$67 million because of strong growth for *Pubs, Taverns & Bars*.

In contrast, the **Food** sub-sector saw establishments decline by 9% to 300, although employment remained stable with a 2% increase to 3,480 workers. Despite the decrease in establishments, sales turnover increased by 12%, totalling \$460 million, reflecting strong demand in *Takeaway Food Services* (+\$24m/+18%) and *Cafes & Restaurants* (+\$26m/+10%) in 2022/23.




While new business expanded considerably for *Sports & Physical Recreation*, the **Leisure & Entertainment** sub-sector experienced an overall marginal decline of 1% to 135 establishments.

Leisure & Entertainment sales turnover, however, increased by 16% to \$326 million, with employment also up by 3% to 1,570 workers. The sectors financial performance was driven by increased spending in *Creative & Performing Arts* (+\$26m) and *sports and recreational activities* (+\$6m).



Retail establishments in Darwin decreased by 2% to 280, with employment remaining stable at 3,190 workers. Sales turnover grew modestly by 4% to \$1.1 billion.

Accommodation also saw a slight decrease of 2% in establishments to 59, while employment increased 8% to 1,430 workers, although is still -22% from 2019's peak. Sales turnover surged 26% to \$353 million outstripping pre-pandemic levels (+23%).

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	30 +25%	6%
 Entertainment	135 -1%	29%
 Food	300 -9%	65%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	280	-2%
 Accommodation	59	-2%

DARWIN'S TRADING PATTERNS

Darwin experienced a contraction in the proportion of businesses operating between the hours of 6pm to 6am between 2023 and 2024. The proportion of businesses open in the evening fell between 2-4 percentage points across each night of the week. This shift was primarily driven by the Food sub-sector. The LGA has, however, had greater participation from Non-Grocery Retail businesses at night across all days. Friday Darwin continues to be its most active night, with 61% of all Core NTE businesses open between 6pm-9pm, although only 30% of Retail businesses are open.

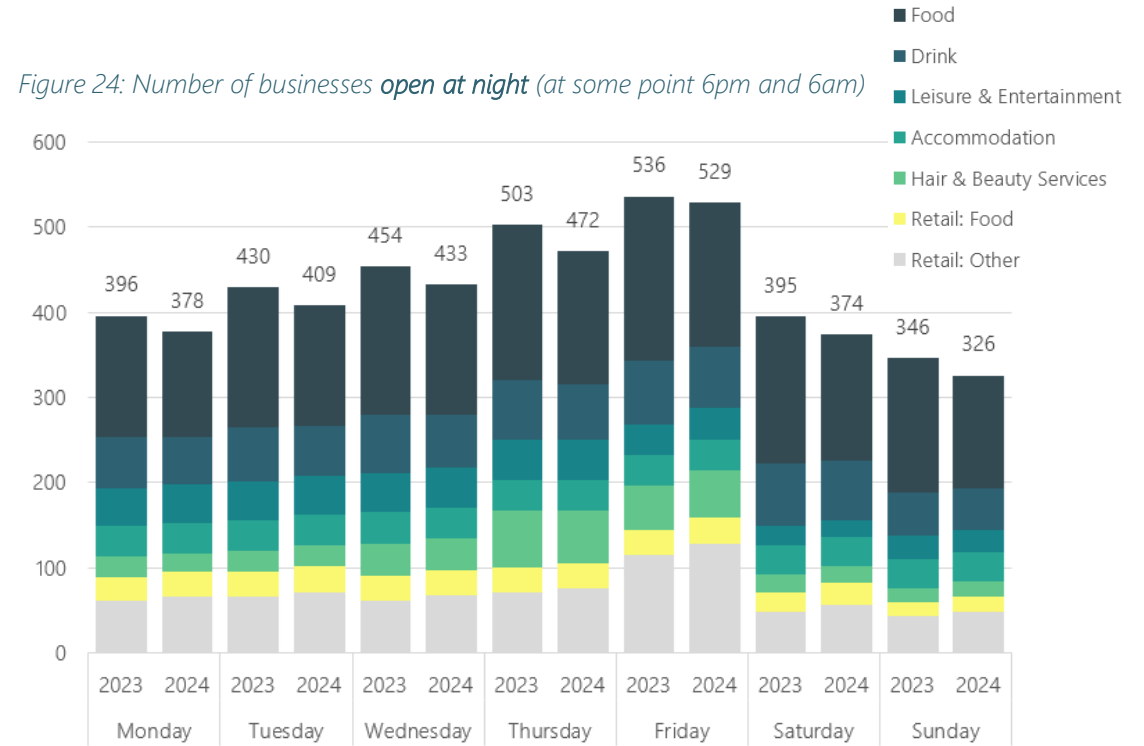


Figure 25: Proportion of all Core NTE businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	48%	24%	7%	7%
Tuesday	53%	25%	7%	8%
Wednesday	57%	26%	8%	8%
Thursday	58%	27%	8%	8%
Friday	61%	31%	12%	7%
Saturday	51%	30%	13%	7%
Sunday	43%	26%	7%	8%

Figure 26: Proportion of all Retail businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	18%	8%	5%	5%
Tuesday	19%	9%	5%	6%
Wednesday	18%	8%	5%	5%
Thursday	19%	8%	5%	5%
Friday	30%	9%	5%	5%
Saturday	15%	9%	5%	6%
Sunday	12%	8%	5%	5%



HOBART TAS

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.



WHERE IS HOBART'S NTE LOCATED?

In the City of Hobart, the majority of consumer-facing night time business activity can be found to the east of the LGA, in the city centre, with concentrations occurring:

- in the CBD and the waterfront
- along Elizabeth Street in North Hobart
- around Salamanca Market
- across Sandy Bay retail centre; and
- around New Town.

Figure 27 provides an overview of this activity, while a more detailed map can be viewed online [here](#).
See 'Using supplementary maps' (p106) for guidance.

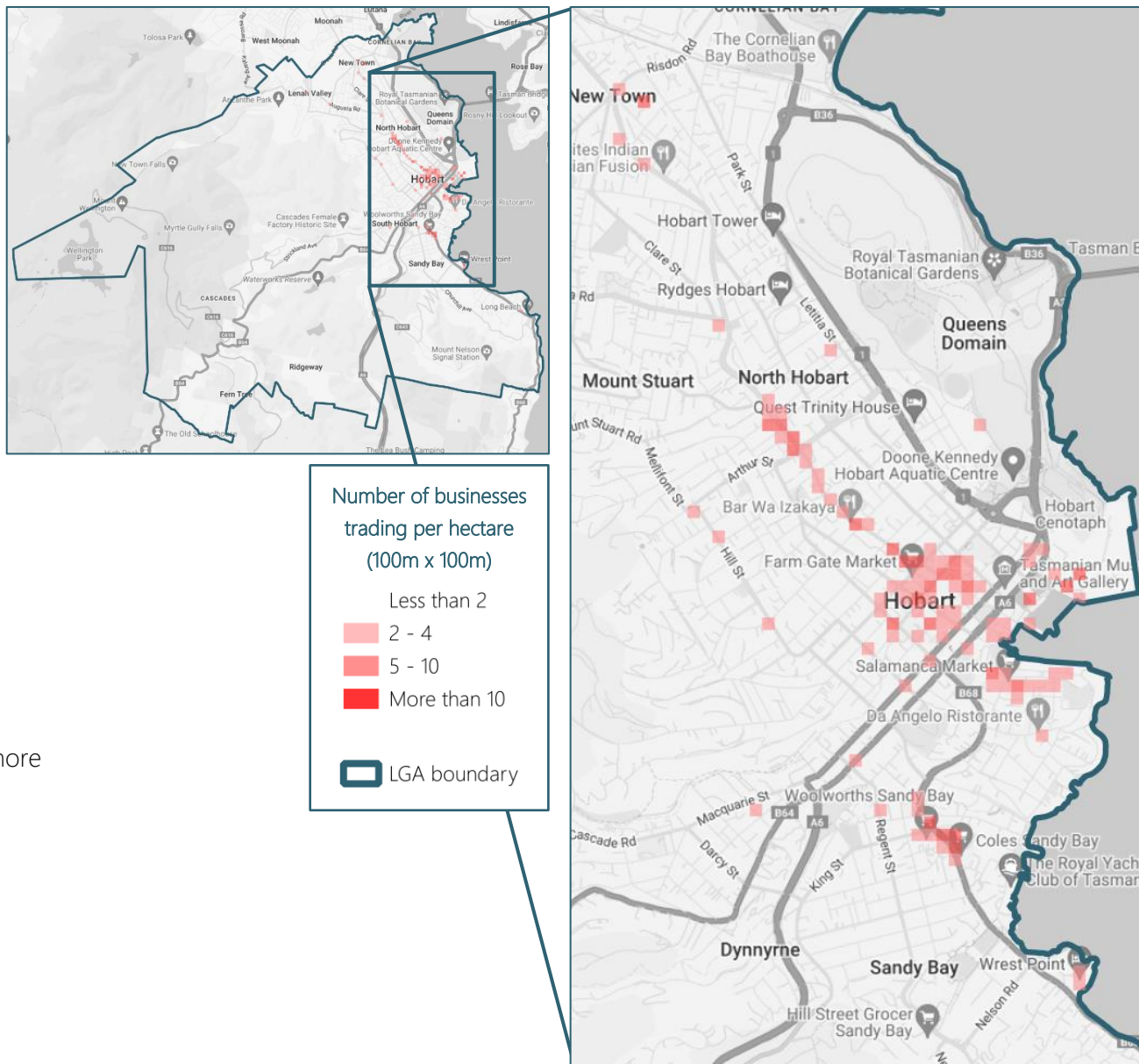


Figure 27: Hobart's Evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

HOBART'S CITY INITIATIVES

The City of Hobart has applied a broad-brush approach to NTE support over the past year, focusing on bespoke events, promoting local businesses and engaging them in events and activations. Most recently, the city hosted the inaugural 'Hobart Hoedown' in the centre of town with more than 500 locals attending.

The 2024 Warm Hearts, Cool Adventures winter campaign kicked off the 2024 off-season, shining a spotlight on winter events, as well as the community organisations that the City of Hobart supports.

The City's business newsletter communicates opportunities to businesses, including the annual Paint the Town Red activation, and the Hello Hobart Christmas Window competition. The City's primary business promotional platform, 'Hello Hobart', was refreshed in late 2023. This included a new website, which now incorporates Australian Tourism Data Warehouse data, expanding the range of events, tours and local businesses presented by the platform. As of May 2024, the platform's Instagram page gained over 15,000 followers for the first time. Hello Hobart regularly writes 'Friday Five' articles which

promote local businesses through a range of topics and themes, including Cosy Date Nights, Hobart's Hidden Bars, and Hobart Venues with Fireplaces - which all focus on promoting Hobart's night time hospitality. The 23/24 Cruise Season also saw the launch of new Hello Hobart signage installed at the Mac2 Cruise Terminal, showcasing Hobart's unique and interesting local hospitality offerings to an estimated 200,000 cruise visitors annually.

The City of Hobart supported the FIFA Women's World Cup 2023 by coordinating live viewing parties in the evening, both in Wellington Court and on Parliament Lawns, while Hello Hobart consolidated lists of all businesses in Hobart who were hosting viewing parties for the Matildas games.

Through Hello Hobart, the City also promotes and supports events such as Franko Street Eats and the Twilight Market to help encourage greater visitation to these night time events.

During Christmas 2023, the City engaged Sugar Republic to activate a series of vacant window frontages in the city. These activations, combined with the Hello Hobart

Christmas window decoration competition, worked to enliven the city streets, and a digital map was created to encourage people to explore the activated shopfronts and participating businesses.

The City also introduced five new self-guided tour experiences on the Freeguides platform, including Hidden Bars of Hobart, Historic Hobart, Vintage Vacation, Savour Hobart and Hidden Treasures of Hobart.

The City's busy events season included both the Taste of Summer and the Hobart International. There was an expanded array of night time entertainment offerings in 2023/24. The City of Hobart also coordinated and managed the 2023 New Year's Eve entertainment and fireworks program on Hobart's waterfront. Furthermore, this year marks the first year the City has sponsored Dark Fringe, taking place in winter 2024. Hobart also played host to, and supported Dark Mofo again in 2023, attracting 300,000 people.

Furthermore, Council-supported outdoor dining in Hobart's MidTown precinct was refreshed, to encourage further night time dining in the precinct.

HOBART'S NTE PERFORMANCE

Hobart's Core NTE faced challenges in the 2022/23 period, with employment decreasing by 14% to 6,060 (-23% from 2021's peak) and the number of establishments slightly declining by 1% to 638. Sales turnover, however, increased by 15% to \$984 million, indicating resilient revenue performance despite setbacks.

Relative to the national trend, Hobart's Core NTE is significant, representing 9% of all establishments, 11% of employment, and 5% of sales turnover (5%, 8%, and 3%, respectively at a national level). Compared to pre-pandemic levels, Hobart's turnover growth highlights the sector's strength and strong consumer engagement, despite the employment decline in the sector (-14% from 2019).

Core NTE overview




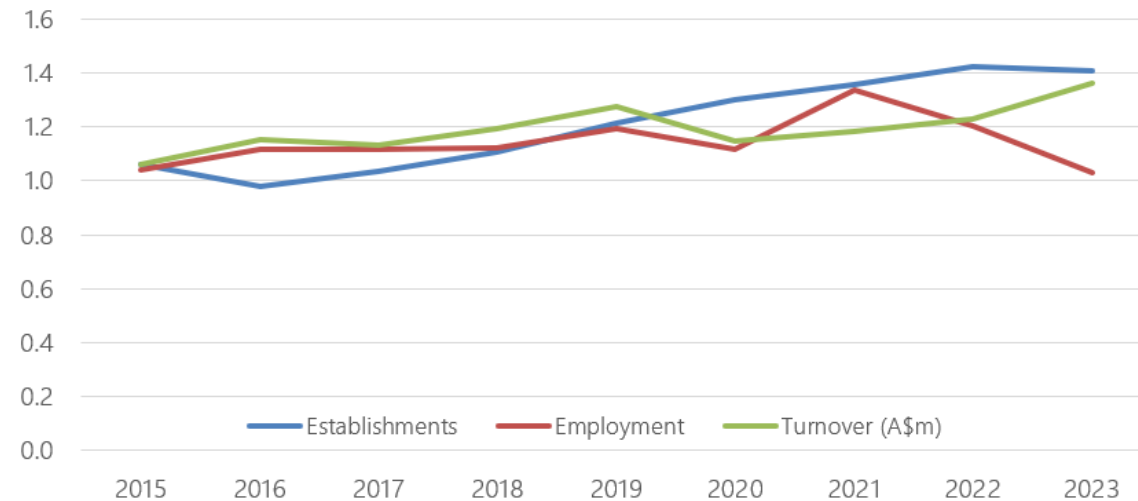
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	638 -1%	9%
 Employment	6,060 -14%	11%
 Sales Turnover	\$984m +15%	5%

Figure 28: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Drink** sub-sector experienced a marginal decline of 3% in establishments to 58, coupled with a 15% decrease in employment to 695 workers completely lead by *Pubs, Taverns & Bars* (-15%). Despite these declines, turnover increased by 12% to \$112 million, also led by *Pubs, Taverns & Bars* contributing 87% of total gains made.




Leisure & Entertainment experienced a slight decrease of 1% in establishments to 147, with employment declining by 10% to 1,075 workers. However, turnover grew notably by 18% to \$228 million, driven primarily by *Creative & Performing Arts* (+29m/+25%).

Food establishments similarly decreased by 1% to 433, with a substantial 16% drop in employment to 4,290 workers. Despite this decline, turnover increased 15% to \$643 million, although as noted earlier many businesses have seen expenses increase by similar amounts and the revenue increase is more likely to represent higher prices than increased business.



Retail establishments decreased 4% in 2023 (to 298), while employment increased 5% to 3,500 workers. Turnover grew marginally by 1% to \$1.6 billion, indicating stable retail demand during the period.

The **Accommodation** sub-sector witnessed a 4% decrease in establishments to 70, combined with an 18% decrease in employment to 1,085 workers. Turnover, however, surged by 18% to \$245 million, suggesting continued momentum in its recovery towards 2018 highs (-9%).

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	58 -3%	9%
 Entertainment	147 -1%	23%
 Food	433 -1%	68%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	298	-4%
 Accommodation	70	-4%

HOBART'S TRADING PATTERNS

In 2024, while the total number of businesses identified as operating between 6pm and 6am fell on most days of the week, the proportion of total businesses operating at night remained relatively static - reflecting the drop in Core NTE Retail businesses shown in the Australian Bureau of Statistics' data.

Thursdays continued to be the city's most active trading night. The pattern of trading hours across the week is smoother than in many other cities, with the difference between the weekdays and weekends less pronounced.

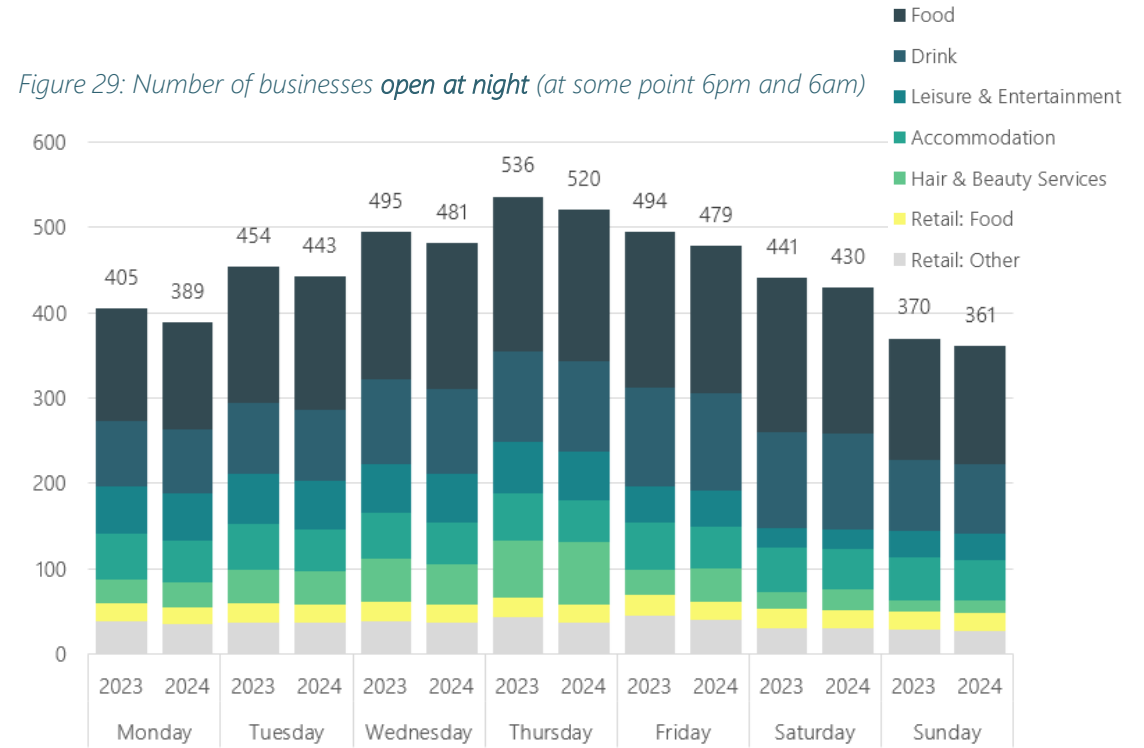


Figure 30: Proportion of all *Core NTE* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	43%	21%	5%	7%
Tuesday	50%	23%	5%	7%
Wednesday	55%	28%	5%	7%
Thursday	58%	29%	6%	7%
Friday	56%	35%	10%	6%
Saturday	52%	35%	10%	7%
Sunday	41%	22%	5%	7%

Figure 31: Proportion of all *Retail* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	12%	5%	3%	3%
Tuesday	13%	5%	3%	3%
Wednesday	13%	5%	3%	3%
Thursday	13%	5%	3%	4%
Friday	13%	6%	3%	3%
Saturday	11%	5%	3%	3%
Sunday	10%	5%	3%	3%

MARIBYRNONG VIC

The City of Maribyrnong is a vibrant region, renowned for its diverse culinary scene, featuring an array of local eateries and cafes. Its thriving arts and culture scene is complemented by numerous parks and recreational areas, and the Maribyrnong River making it a haven for nature enthusiasts. The local markets and community events reflect the suburb's rich cultural tapestry, offering a taste of its welcoming community.





WHERE IS MARIBYRNONG'S NTE LOCATED?

In July 2024, the City of Maribyrnong's consumer-facing night time business activity can be found in and around the Highpoint Shopping Centre, as well as to the north and south of Barkly Street in Footscray, east of the Princes Highway.

Other smaller clusters of activity can be seen:

- around Yarraville station, and
- in Seddon along Victoria Street and Charles Street.

Figure 32 provides an overview of this activity, while a more detailed map can be viewed online [here](#).
See 'Using supplementary maps' (p106) for guidance.

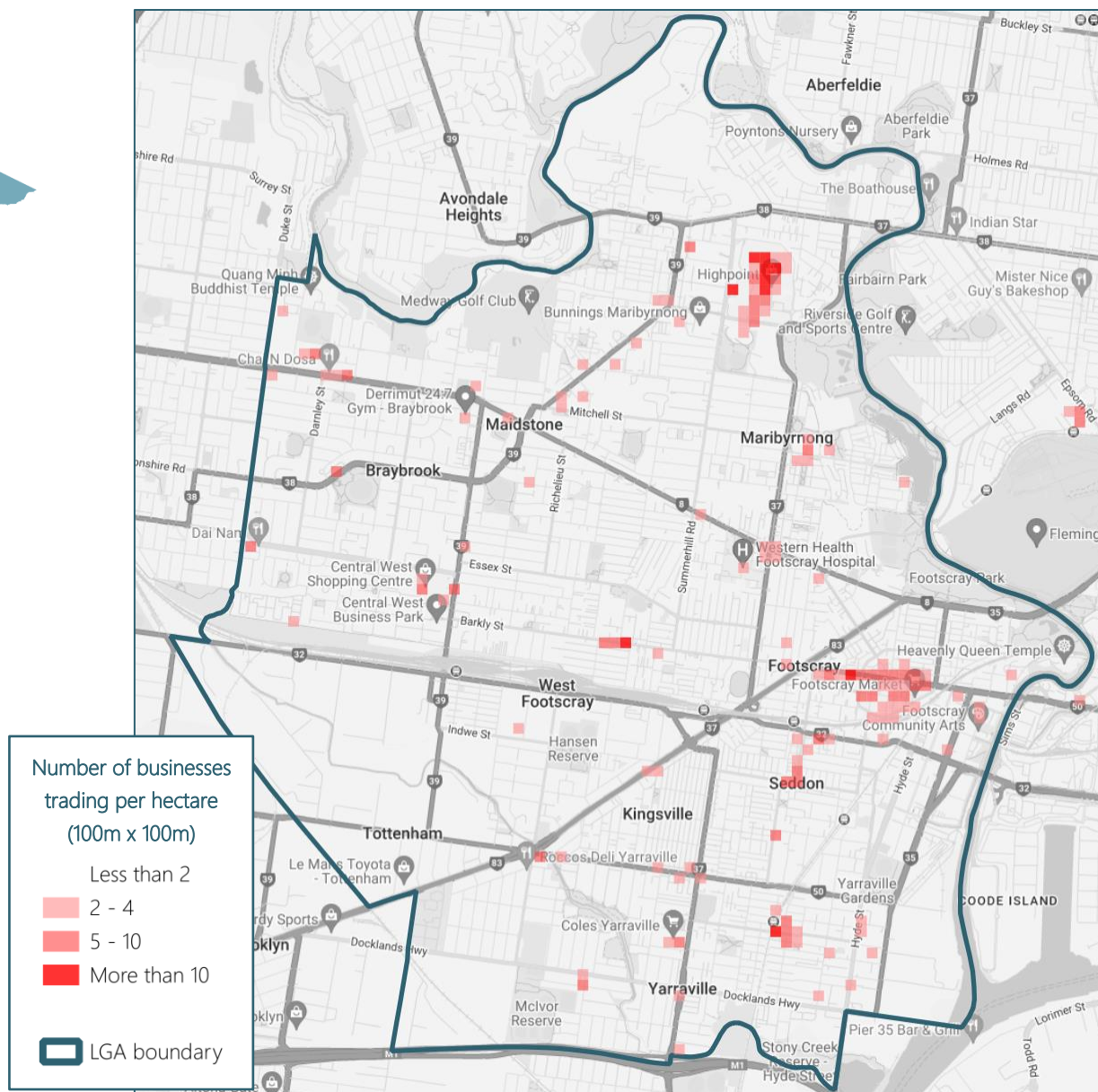


Figure 32: Maribyrnong's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

MARIBYRNONG'S CITY INITIATIVES

In the heart of Melbourne's Inner West, Maribyrnong City Council has a unique mixture of activity centres and boasts a diverse evening economy. From the hustle, bustle and colour of Footscray, to the quieter and cosier village vibes of Yarraville, Seddon and West Footscray, through to the powerful retail pull of Highpoint Shopping Centre, there is a something on offer for everyone.

Maribyrnong City Council has a strong focus on supporting its evening economy through a range of initiatives.

The Love Your Local Campaign was developed as a response to Covid Lockdowns and was evolved to become a channel to highlight and promote businesses in the visitor economy, with an emphasis on those that are active in the evening. The campaign website had over 80,000 unique visitors and was de-commissioned in May 2023 to be superseded by the [Love Your West Campaign website](#).

Council's "Love Your West – Festivals and Activation Grants program" was designed by Council to support and empower local businesses and community groups to plan and deliver events, festivals and activations under a number of categories:

- Signature Festivals (Biennial)
- Place Based Initiatives (Annual grants)
- Place-Based Initiatives (Quick Response)
- Night Time Diversification (Quick Response)

In 2022/23 Council allocated \$390,000 towards Festivals and Events grant program with \$270,000 allocated for signature events, and \$120,000 allocated for Place-Based Initiatives. A total of 25 eligible applications were received for the program which requests far surpassing the available funding.

Many of these events have had a focus on activating the precincts in the evenings.

In addition to the grant program, Council also delivers a number of signature events throughout the year with a strong focus on activating the evening economy. The annual highlight being the New Years Eve event at Footscray Park which attracted over 27,000 people in 2022.

MARIBYRNONG'S NTE PERFORMANCE

Maribyrnong's Core NTE experienced a mixed 2022/23 period. While the number of establishments dropped by 10% to 729, employment saw a slight increase of 2%, totalling 3,355. Sales turnover, however, showed substantial growth, rising 10% to \$423 million – indicating strong revenue generation despite a reduction in businesses.

Maribyrnong's Core NTE comprises 8% of all establishments, 9% of employment, and 3% of sales turnover in Maribyrnong's economy. Compared to pre-pandemic levels, Maribyrnong's Core NTE continues to outperform national averages since 2019, particularly in employment (+10% vs -1% nationally).

Core NTE overview




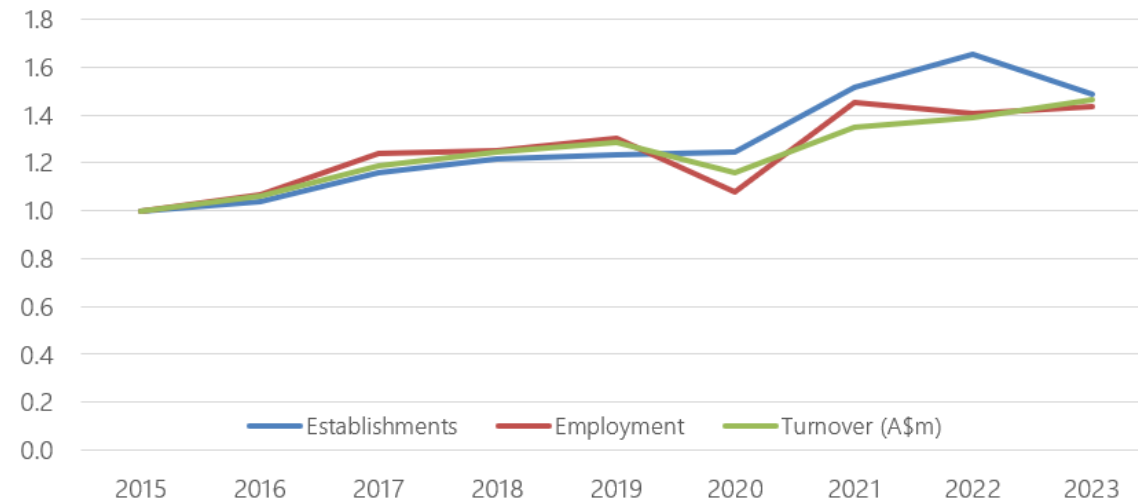
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	729 -10%	8%
 Employment	3,355 +2%	9%
 Sales Turnover	\$423m +10%	3%

Figure 33: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

Establishments in the **Drink** sub-sector increased by 4% in 2023 to 50, however this was accompanied by a slight decline (-3%) in employment to 315 workers. Sales turnover growth was led by *Pubs, Taverns & Bars* growing 4% to \$51 million in 2022/23.




In **Leisure & Entertainment**, there was a notable 11% decrease in establishments (to 258), contrasting with a strong 15% increase in employment to 750 workers. Sales turnover rose 7% to \$105 million, which was primarily driven by impressive performance in the *Creative & Performing Arts* (+\$7.7m).

In 2023, there was an 11% reduction in **Food** establishments (to 421), while employment remained relatively stable with a marginal 1% decrease (-20) to 2,290 workers. Sales turnover, however, increased 12% to \$267m.



Retail establishments experienced a marginal decline of 1% (to 505), while employment surged 13% to 2,265 workers. Sales turnover grew 6% reaching \$757 million in 2022/23.

The **Accommodation** sub-sector faced the most significant challenges with a 31% decrease in establishments (reducing to 9), coupled with a steep decline (-36%) in employment to 35 workers. Coupled with these changes, the sub-sector also saw sales turnover decrease 14% to \$6 million over the same period.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	50 +4%	7%
 Entertainment	258 -11%	35%
 Food	421 -11%	58%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	505	-1%
 Accommodation	9	-31%

MARIBYRNONG'S TRADING PATTERNS

Within Maribyrnong NTE's, Thursday and Friday nights see strong business activity, with both days having considerably more business operating when compared to the other nights of the week. This activity is driven by more Retail, and Hair & Beauty Services trading at night, with 44% of Retail businesses operating on Thursday and Friday evenings.

The proportion of Core NTE operating in the evening is above average, when compared to other cities reported on, with all nights exceeding +50%, and Thursdays and Fridays exceeding 70% between 6pm and 9pm.

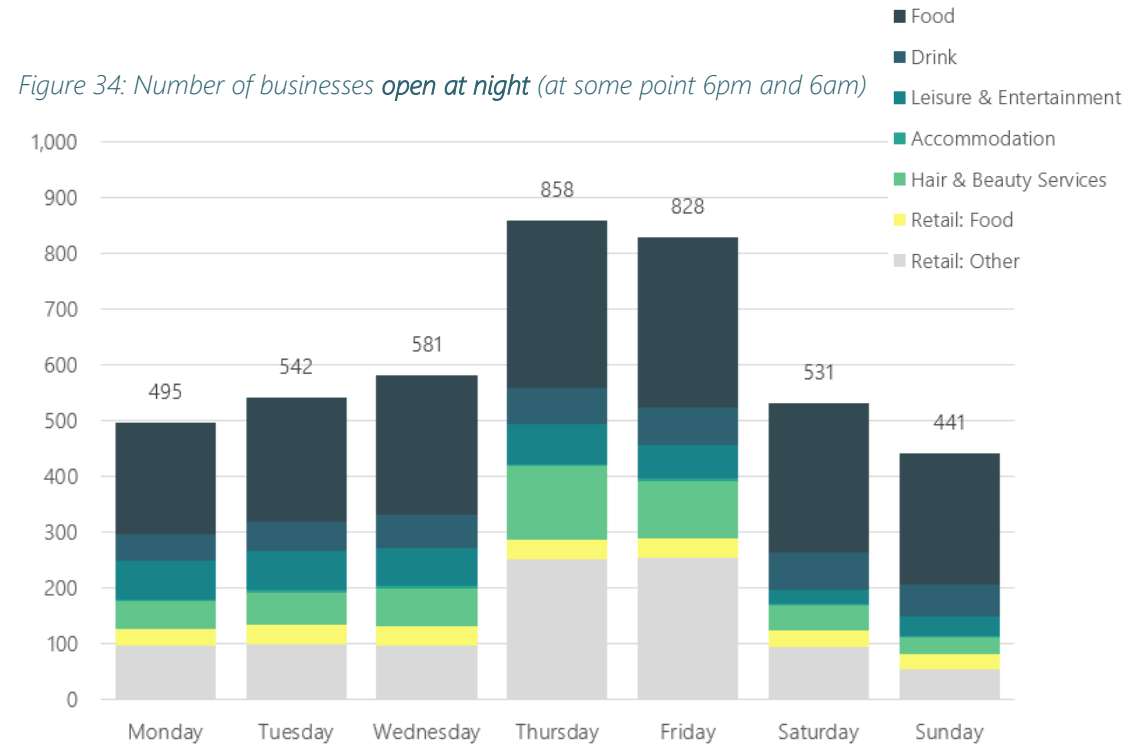


Figure 34: Number of businesses open at night (at some point 6pm and 6am)

Figure 35: Proportion of all Core NTE businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	52%	27%	7%	8%
Tuesday	58%	29%	7%	7%
Wednesday	63%	33%	8%	8%
Thursday	73%	36%	9%	8%
Friday	72%	41%	11%	6%
Saturday	61%	40%	11%	5%
Sunday	52%	31%	8%	8%

Figure 36: Proportion of all Retail businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	19%	8%	3%	4%
Tuesday	20%	7%	3%	4%
Wednesday	20%	8%	3%	4%
Thursday	44%	8%	3%	4%
Friday	44%	8%	3%	3%
Saturday	19%	7%	2%	2%
Sunday	12%	6%	3%	3%



MELBOURNE VIC

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.



WHERE IS MELBOURNE'S NTE LOCATED?

In the City of Melbourne in 2024, concentrations of consumer-facing night time business activity are most active in the CBD.

There are also clusters of activity in surrounding areas of:

- Southbank
- The Docklands and South Wharf
- Lygon Street
- Errol Street; and
- Kensington.

Figure 37 provides an overview of this activity, while a more detailed map can be viewed online [here](#). See 'Using supplementary maps' (p106) for guidance.

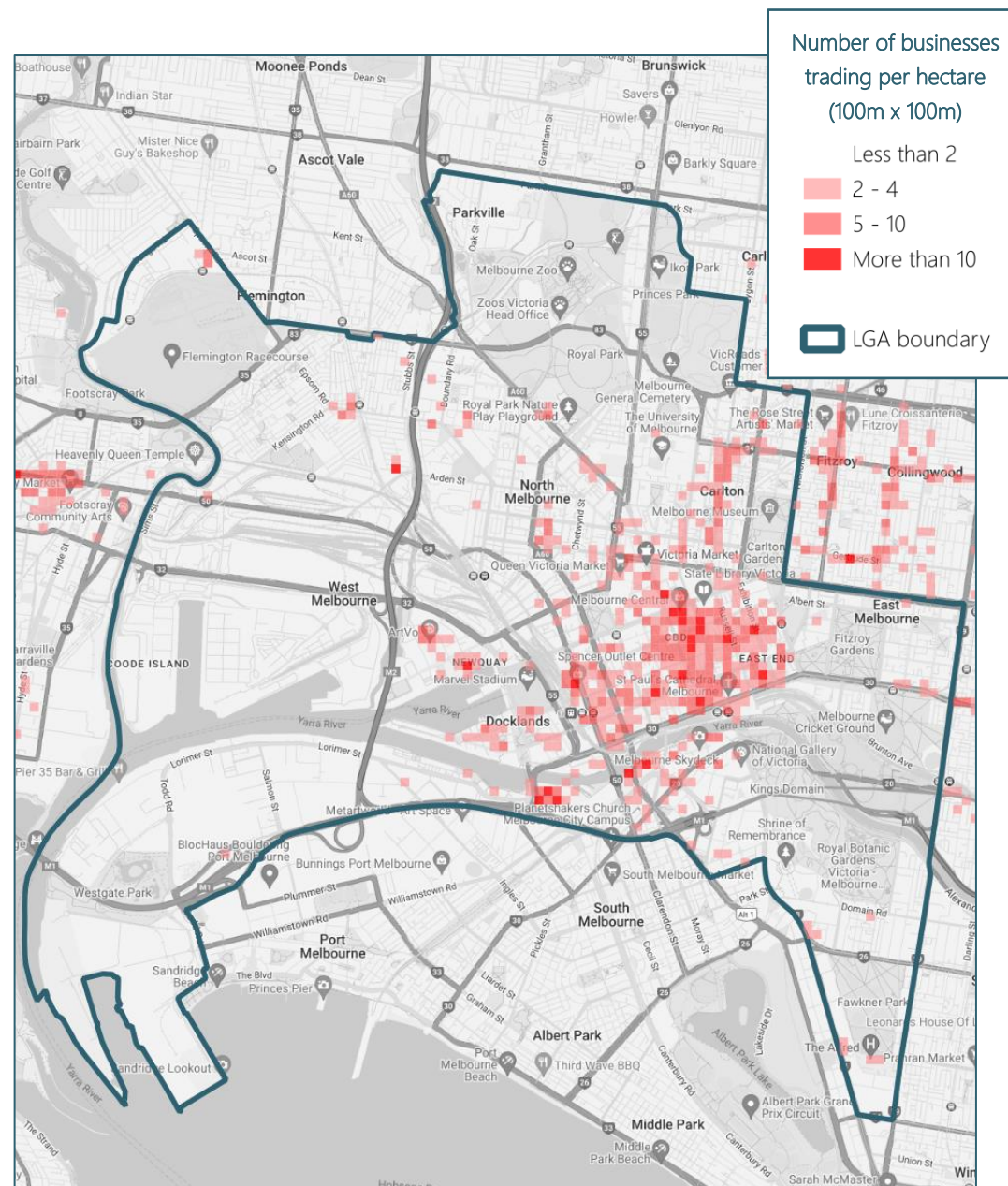


Figure 37: Melbourne's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

MELBOURNE'S CITY INITIATIVES

In 2022/2023, Melbourne further enhanced its reputation as a dynamic entertainment destination and a bustling business hub. A goal for the city was to thrive economically, offering an attractive environment for workers, students, residents and visitors. To achieve this, the City of Melbourne facilitated various events, activations and marketing campaigns, with a particular focus on boosting the night time economy. City of Melbourne events generated \$96 million in economic value and attracted 3.7 million visitors this year, reinforcing Melbourne's status as Australia's sports, arts and events capital in economic value.

The City of Melbourne delivered five premier events across the year - Moomba, Firelight Festival, Melbourne Fashion Week, Christmas and New Year's Eve – alongside more than 60 supported events through programs like the Events Partnership Program and City Revitalisation Event Support Program, delivered in partnership with the Victorian Government. Firelight Festival was particularly successful, drawing its largest crowd to date in July 2022. Over three nights, more than

105,000 attendees participated, generating an economic impact of \$8.26 million.

Following its establishment in 2021, the Night Time Economy Advisory Committee was extended through to 30 June 2023, under the direction of a new Chair, Penny Miles. Penny, a consultant to the arts, creative and non-for-profit sectors, lead the committee on further initiatives aimed at enhancing Melbourne's resurgence after dark.

Over the 2022-2023 financial year, key achievements of the NTEAC included:

- Hosting a delegation of international night mayors in May 2023, with representatives attending from London, Paris, New York, Barcelona and Berlin, in partnership with the University of Melbourne's Centre for Cities and the New South Wales Government.
- Informing the Dusk till Dawn Activation Grants Program that delivered 17 activations in the city, starting in May 2023.
- Advising City of Melbourne on a number of initiatives, including the Only in the City marketing campaign, Now or Never, Melbourne Economic Snapshot and the

forthcoming Destination Management Plan (Experience Melbourne 2028).

Night time spending (after adjusting for inflation) was 12% higher in April 2023 than it was in April 2019. And in April 2023, night time spending accounted for one-third of all spending in the City of Melbourne.

The City of Melbourne has transitioned to a new phase of its night time economy program. With the conclusion of the NTEAC on 30 June 2023, the Council will now host a series of in-depth roundtable discussions. In 2023, the City of Melbourne established a new City Economy Advisory Committee, uniting key business, industry, and stakeholder groups to enhance Melbourne's appeal as an all-day destination.

MELBOURNE'S NTE PERFORMANCE

Melbourne's Core NTE has shown notable growth in 2023. Sales turnover increased by 20% to \$4.3 billion, and employment also expanded 8% to 32,990 workers, highlighting a strong rebound in job creation after 2022's slight decline (-2%). While these metrics increased, the number of establishments saw a decrease of 4%, reducing to 2,969.

While Melbourne's Core NTE accounts for 7% of all establishments, and 4% of all sales turnover, Core NTE employment represents 10% of all employment. Compared to pre-pandemic levels, Melbourne's NTE has shown resilience, particularly in turnover and employment, reflecting a vibrant economic recovery, despite fewer establishments in 2023.

Core NTE overview




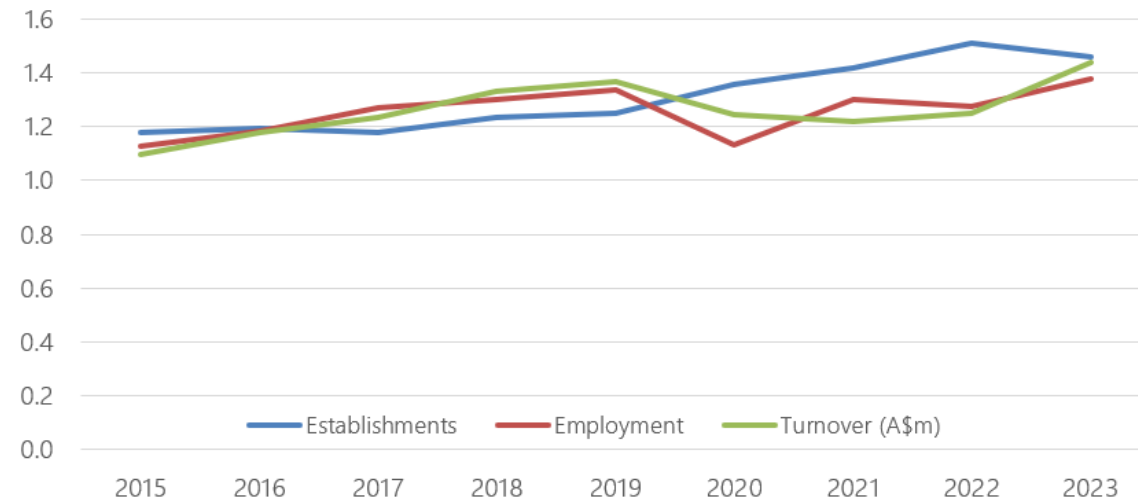
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	2,969 -4%	7%
 Employment	32,990 +8%	10%
 Sales Turnover	\$4,339m +20%	4%

Figure 38: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

Despite strong growth overall, the **Drink** sub-sector faced challenges, with the number of establishments decreasing 12% (to 207) and employment declining 2% to 3,075 employees. Despite these setbacks, the sub-sector saw a 7% increase in sales turnover, reaching \$359 million – primarily driven by *Pubs, Taverns & Bars*, (+\$26m).




While establishments in **Leisure & Entertainment** reduced by 2% in 2023 (to 688), the sub-sector experienced a large 30% increase in employment, rising to 5,965 employees, and a significant 27% increase in sales turnover to \$1,075 million. These results were driven by Melbourne’s vibrant *Creative & Performing Arts* (+\$152m / +785 employees) with both metrics surpassing pre-pandemic levels, following a decline in 2022.

The **Food** sub-sector saw a slight decline in the number of establishments, dropping 3% to 2,074. Despite this, employment grew 5% to 23,945 employees, and sales turnover notably increased by 19%, reaching \$2.9bn.



Retail remained stable in the number of establishments in 2023 (1,520), while employment rose 9% to 10,755 employees, and sales turnover modestly increased (+3%) to \$3.9 billion.

The **Accommodation** sub-sector continued to show robust growth in 2023, with a 7% increase in the number of establishments (to 289). Employment also rose 6% to 6,450 employees, and growth in sales turnover markedly expanded by 38% to \$1.2 billion for the period – putting it ahead of pre-pandemic levels, supported by the lifting of pandemic restrictions and associated rise in staycations.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	207 -12%	7%
 Entertainment	688 -2%	23%
 Food	2,074 -3%	70%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	1,520	-0%
 Accommodation	289	+7%

MELBOURNE'S TRADING PATTERNS

In July 2024, the City of Melbourne saw an increase in the proportion of businesses trading in NTE hours across the week, when compared to the same time of year in 2023.

Friday continues to have the most the businesses operating at night, while weekend businesses trading participation still tapers off, although weekend activity has improved when compared to last year.

Melbourne had the highest average rate of evening (6-9pm) trade for Retail (33% average). Core NTE trade was also relatively strong, with Tuesday through to Saturday seeing trade participation above 50%.

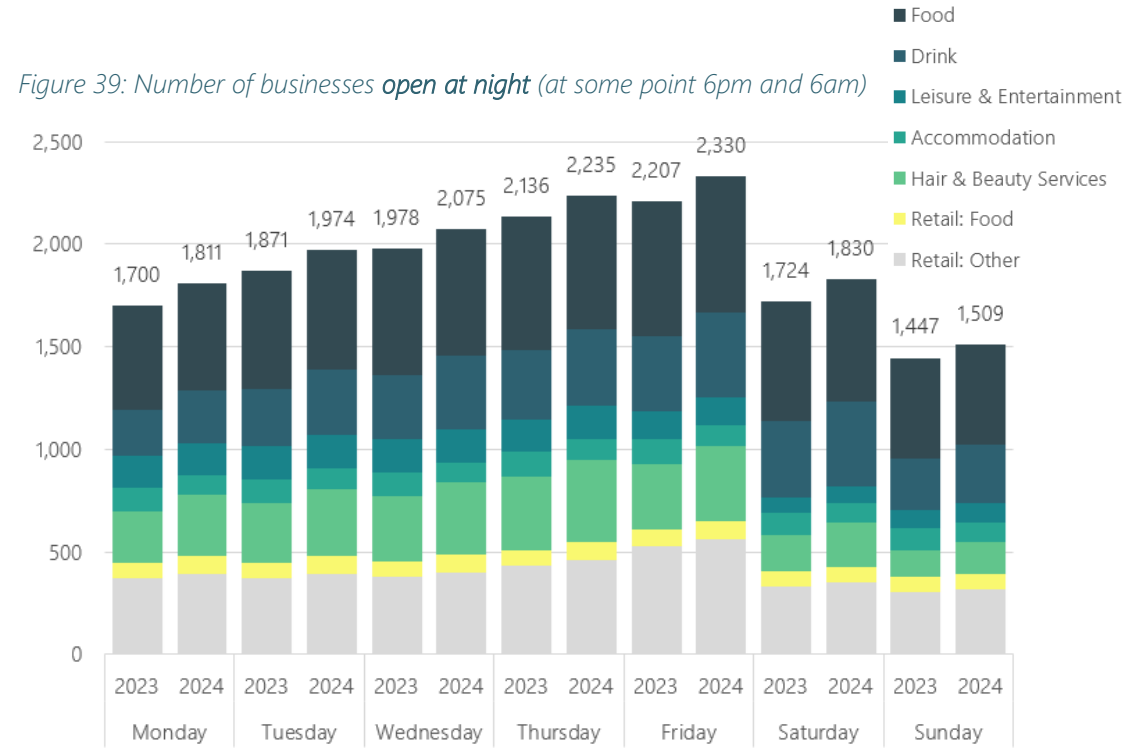


Figure 40: Proportion of all Core NTE businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	46%	30%	9%	7%
Tuesday	53%	35%	9%	7%
Wednesday	57%	38%	10%	7%
Thursday	59%	40%	11%	8%
Friday	60%	45%	17%	8%
Saturday	54%	44%	18%	8%
Sunday	42%	30%	9%	7%

Figure 41: Proportion of all Retail businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	32%	15%	9%	8%
Tuesday	32%	16%	9%	8%
Wednesday	33%	16%	8%	8%
Thursday	37%	16%	9%	9%
Friday	44%	16%	9%	9%
Saturday	29%	16%	9%	8%
Sunday	26%	14%	8%	8%

NEWCASTLE NSW

The beating heart of the Hunter region, Newcastle blends the best of laid-back coastal life, with a city bustling with restaurants, events and nightlife. Hubs like Honeysuckle and Darby Street host live music, theatre, and festivals, while many enjoy the local craft beer scene and evening waterfront strolls.





WHERE IS NEWCASTLE'S NTE LOCATED?

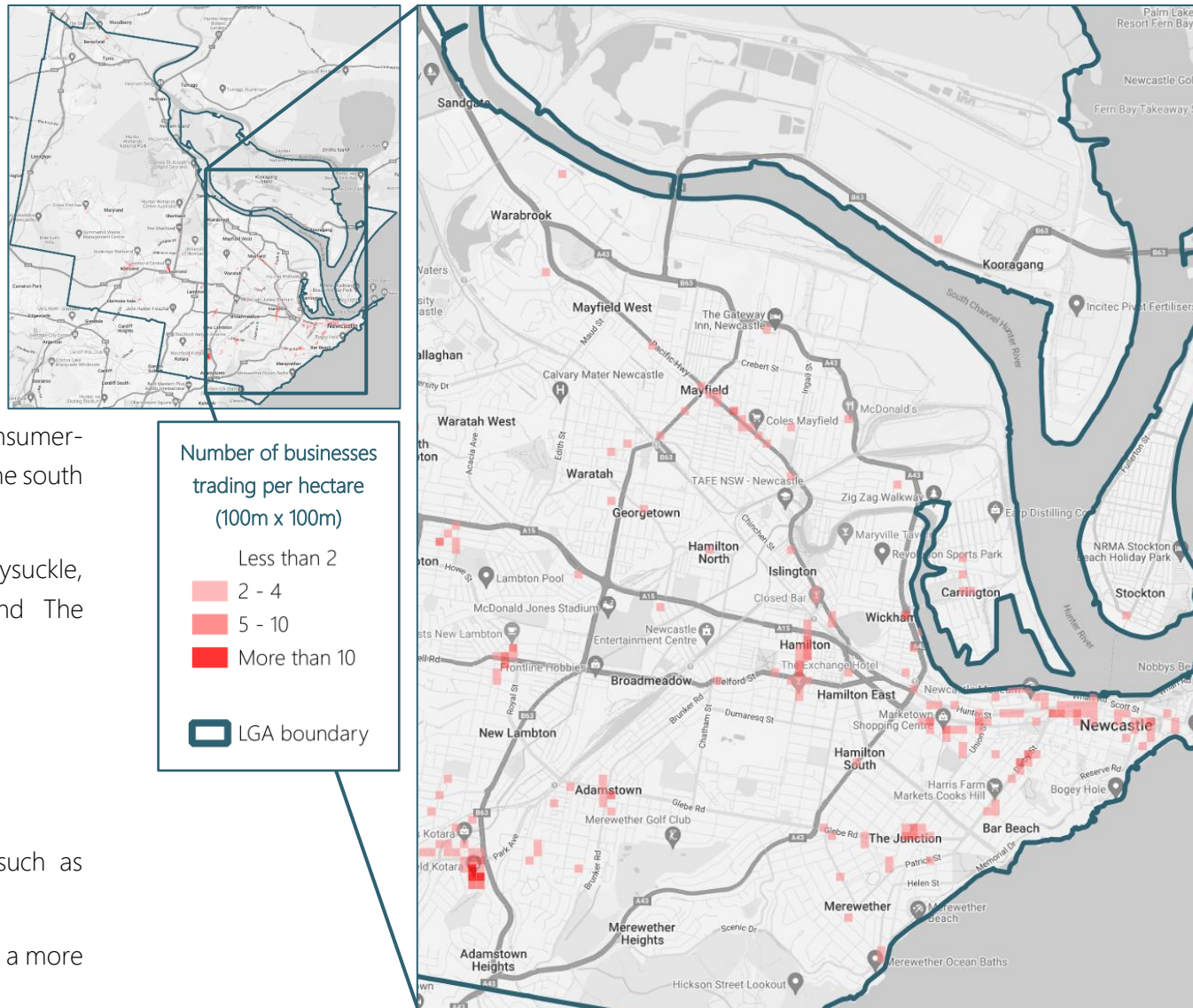
In July 2024, concentrations of Newcastle's consumer-facing night time business activity can be found to the south east of the LGA. Key clusters of activity include:

- The precincts of Newcastle West, Honeysuckle, Civic-CBD, Darby St, Newcastle East and The Junction.
- Along Beaumont Street in Hamilton
- Around Westfield Kotara
- Wallsend; and
- Maitland Road, Mayfield

Pockets of activity can also be found in areas such as Jesmond, the Junction and Adamstown.

Figure 42 provides an overview of this activity, while a more detailed map can be viewed online [here](#).

See 'Using supplementary maps' (p106) for guidance.



Number of businesses trading per hectare (100m x 100m)

- Less than 2
- 2 - 4
- 5 - 10
- More than 10

LGA boundary

Figure 42: Newcastle's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

NEWCASTLE'S CITY INITIATIVES

City of Newcastle continues to support its vibrant cultural scene through initiatives like the [Locally Made and Played](#) grant program, showcasing live entertainment across various venues to attract diverse audiences. The program has provided an additional 240 performances in Newcastle, and over \$100,000 in direct support for local artists over three years.

Newcastle's flagship arts and cultural festival [New Annual](#) saw the city humming with events across ten days of creativity. The festival has secured ongoing support for the regions creative arts industry, with City of Newcastle locking in a five-year commitment to New Annual. In addition to creating a platform for strategic and long-term planning to enable high-profile collaborations and wider recognition, the city has established the 'Made New' program. Made New provides an opportunity for local artists to become part of the festival program and showcase the

region's talent with local performers accounting for over 60 per cent of this year's programming. New Annual's significance extends beyond its support for the arts by strengthening Newcastle's position as a cultural tourism destination, which in turn generates an economic boost for local businesses through longer stays and increased visitor spending.

City of Newcastle continues to deliver on the Newcastle After Dark Action Plan with nighttime economy theming integrated into the latest tourism branding campaign [Seek Off Beat](#). Newcastle now boasts three 5 star hotels in its CBD, all of which have opened in the last 4 years.

Newcastle has played host to some of the world's largest names and finest events thanks to a partnership between City of Newcastle and Venues NSW. Making a name as a global events city, the partnership has attracted the likes of Elton John, Paul McCartney, and P!NK. City of Newcastle is dedicated to fostering a whole of city experience and have

encouraged attendees to embrace the heightened vibrancy throughout the city and through its venues. City of Newcastle funded ancillary activation of the city to add to the vibrancy by encouraging attendees to stimulate the economy further through the Elton John Yellow Brick Road Trail and the P!NK Party Trail. Local business loved the atmosphere of excitement and created dazzling shopfront displays, custom cocktails, and special offers for the occasion.

City of Newcastle has worked closely with the NSW Government on reforms set to boost NSW's night time economy with NSW Minister for Music and the Night-time Economy and the 24-Hour Economy Commissioner both paying visit to Newcastle in recent months. After a successful information session in Newcastle, four precincts in the city have been selected to participate in the NSW Government Uptown District Accelerator program.

NEWCASTLE'S NTE PERFORMANCE

During the 2022/23 period, Newcastle's Core NTE experienced substantial growth. Financial performance was particularly strong, with sales turnover increasing 23%, to \$2.1bn. Employment also saw a notable rise of 10% to 14,335 workers, while the number of establishments expanded by 7% to 1,090. Compared to pre-pandemic levels, the Core NTE has shown a solid recovery, through strong establishment (+28%) and sales turnover growth (+32%) since 2019.

Newcastle's Core NTE represents 7% of all establishments, 13% of employment, and 5% of sales turnover. This is particularly strong compared to the national average (5% of establishments, 8% of employment and 3% of sales turnover), highlighting the sector's importance to Newcastle's economy.

Core NTE overview




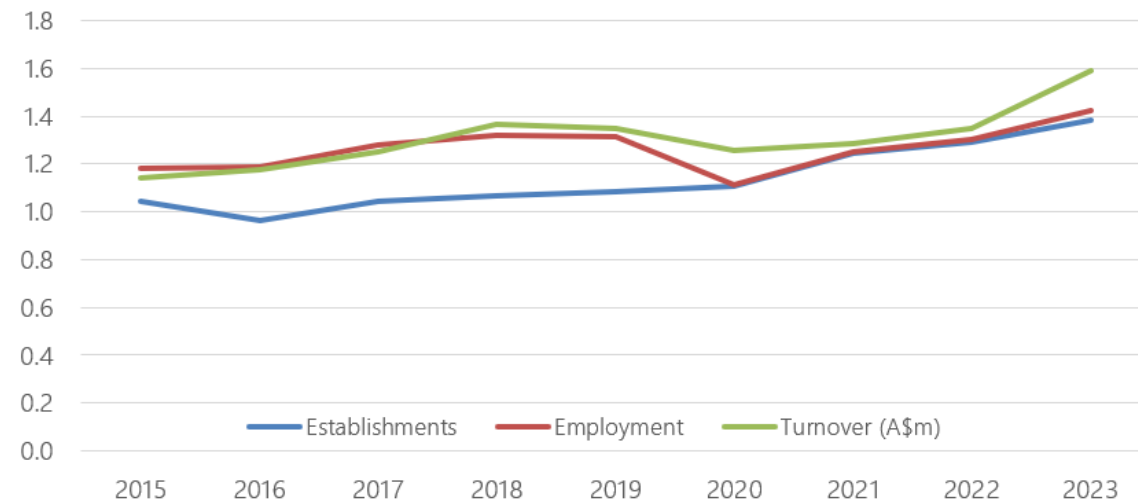
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	1,090 +7%	7%
 Employment	14,335 +10%	13%
 Sales Turnover	\$2,114m +23%	5%

Figure 43: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Food** sub-sector performed particularly well in 2023, with establishments increasing 4% to 607 and employment growing substantially (+13%) to 7,750 employees. Sales turnover rose by 27% to \$1.1 billion, adding \$228 million to the local economy.




Leisure & Entertainment gained new businesses in 2023, with establishments increasing 14% (to 368). Employment also grew (+5%) to 4,455 employees, while sales turnover increased by 18% to \$753 million, with strong growth across all industries.

For the **Drink** sub-sector, establishment growth was moderate, increasing just 1% to 115. Employment, however, rose 8% to 2,125 employees, and sales turnover saw a substantial 20% increase, reaching \$295 million – all driven by strong performance in *Pubs, Taverns & Bars* (+9% employment and +25% in sales turnover).



In contrast, **Retail** faced decline, with the number of establishments decreasing 5% to 569. Employment remained stable at 4,200 workers, while sales turnover increased 8% to \$1.7 billion.

The **Accommodation** sub-sector showed robust growth, with establishments increasing 14% to 88 and employment increasing by the same percentage to 1,125 employees – surpassing pre-pandemic levels by 14%. Sales turnover also saw a strong increase of 33%, expanding to \$239 million.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	115 +1%	11%
 Entertainment	368 +14%	34%
 Food	607 +4%	56%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	569	-5%
 Accommodation	88	+14%

NEWCASTLE'S TRADING PATTERNS

In the City of Newcastle LGA, Thursday night continues to see the highest number of businesses trading, with Non-Grocery Retail, and Hair & Beauty Services maintaining strong participation levels. Between July 2023 and July 2024, the city saw an increase in the proportion of businesses operating during the hours of 6pm to 6am, particularly between 9pm and midnight from Thursday to Saturday. These nights saw a 2-3 percentage point increase in the proportion of Core NTE businesses operating. Despite this, the proportion of Core NTE businesses operating in the Early Night was notably below many other cities analysed.

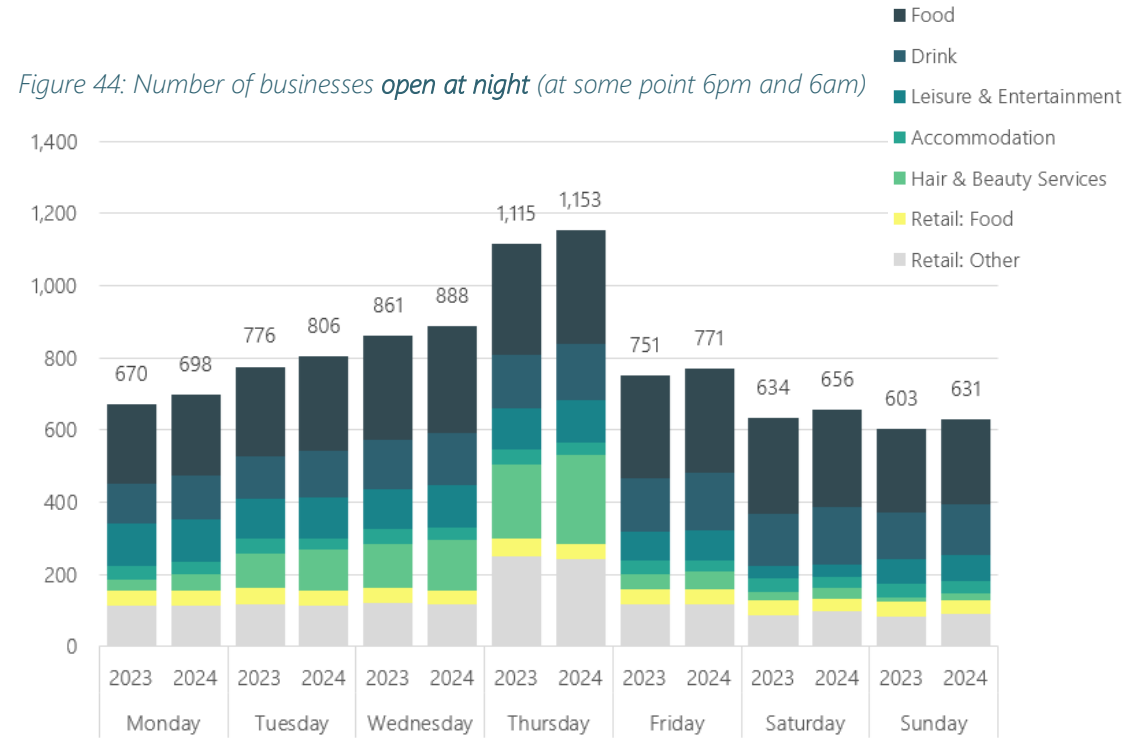


Figure 45: Proportion of all *Core NTE* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	48%	21%	6%	12%
Tuesday	53%	22%	6%	12%
Wednesday	58%	25%	7%	12%
Thursday	62%	27%	7%	12%
Friday	58%	31%	9%	5%
Saturday	50%	31%	9%	5%
Sunday	42%	21%	5%	12%

Figure 46: Proportion of all *Retail* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	19%	9%	4%	5%
Tuesday	19%	9%	4%	5%
Wednesday	19%	9%	5%	6%
Thursday	35%	9%	5%	6%
Friday	19%	10%	6%	5%
Saturday	16%	9%	5%	4%
Sunday	15%	8%	4%	5%



PARRAMATTA

NSW

Parramatta, the rising star of Greater Sydney, blends rich history with modern vibrancy. With its diverse dining scene, and burgeoning arts and culture offerings, Parramatta is rapidly becoming a must-visit destination. 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.



WHERE IS PARRAMATTA'S NTE LOCATED?

In July 2023, the largest cluster of consumer-facing evening businesses were found around the CBD (which recently gained [Purple Flag accreditation](#)), along Church Street, up to North Parramatta and within Harris Park.

There are smaller clusters in locations such as:

- Epping,
- Carlingford, and,
- North Rocks.

Figure 47 provides an overview of this activity, while a more detailed map can be viewed online [here](#) based on 2023 activity.

See 'Using supplementary maps' (p106) for guidance.

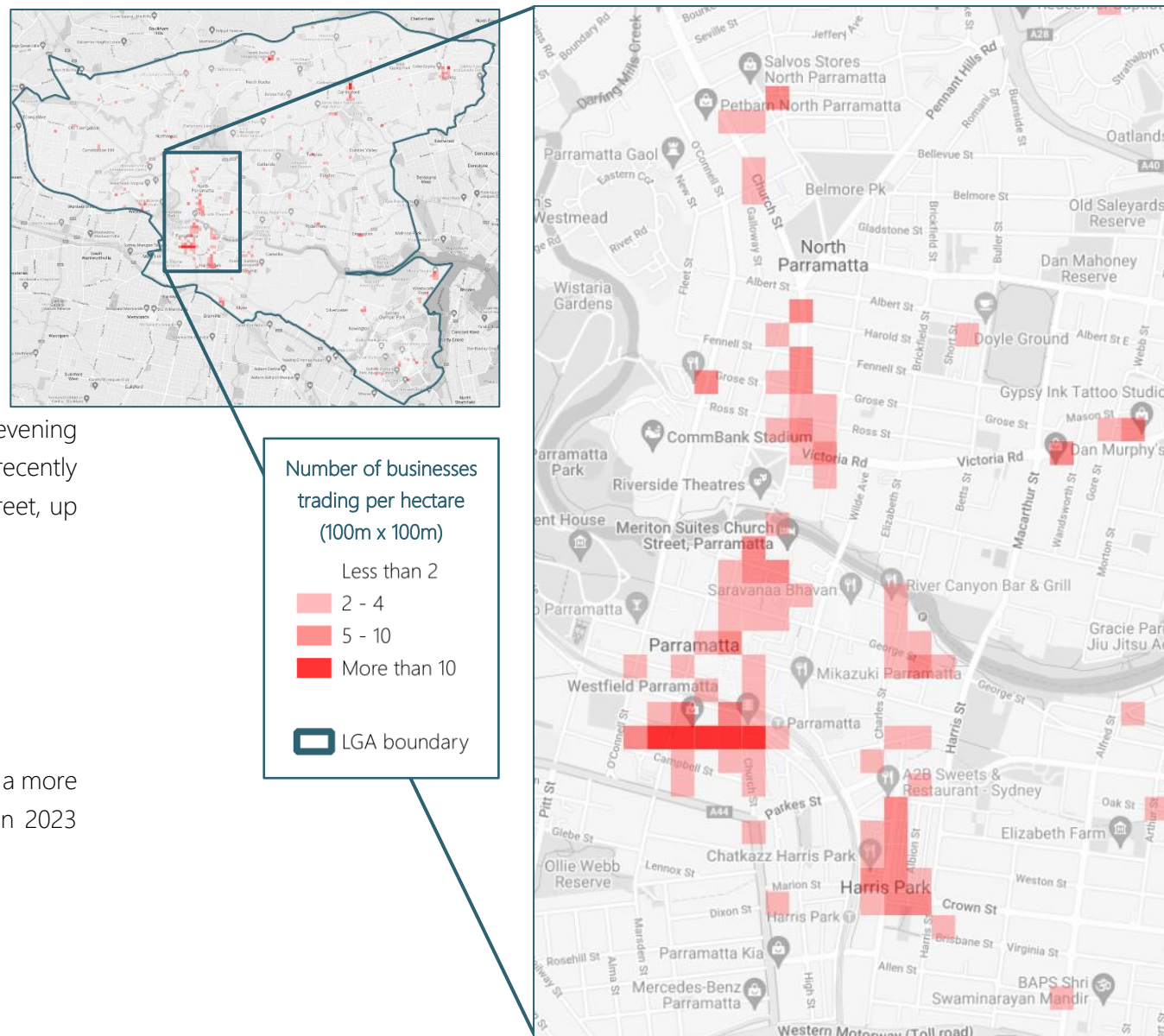


Figure 47: Parramatta's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations (July 2023)

Please note that this section shows July 2023 data as per the reporting options selected by City of Parramatta Council.

PARRAMATTA'S CITY INITIATIVES

City of Parramatta is continuing to deliver the strategic goals within the Night City Framework 2020-2024 and has commenced a review process to develop the Framework into a 24-Hour Economy Strategy. The Night City Framework 2020-2024 has six key focus areas:

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

Demonstrated below:

Western Sydney Culture Up Late: In 2023 City of Parramatta secured \$198,000 from the State Government Western Sydney Culture Up Late funding project. Funding was shared between Riverside Theatre, and PHIVE Parramatta. Riverside activated their courtyard with music, dance, and more. PHIVE Parramatta engaged FORM Dance Projects to create a new work combining song, food, and

dance to tell the stories of Parramatta, its people and land.

Night Time Economy Diversification Grants: In 2023 the Night Time Economy Diversification Grants continued. Supporting six successful applicants with \$50,000 to deliver programming that included, live music, poetry performances, workshops, dance, and a performance by the Western Sydney Youth Orchestra in Parramatta Square.

Cultural Infrastructure and programming: In 2023 the renovated Parramatta Town Hall opened, exemplifying how considered renovations can celebrate its heritage, and unlock potential as a hub for night time events and programming. Since reopening Parramatta Town Hall has been host to many events, including Parachute Music Festival.

2023 saw Parramatta Lanes return with 188,000 people of all ages attending the four-night festival of food, art and music, a significant increase on the 77,000 attendances in 2022.

Parramatta Artist Studios (PAS) opened its new twelve studio hub in Granville which includes an Artist-in-Residence Studio, and a dedicated collaboration space for First Nations artists.

PHIVE, and Riverside Theatre continue to drive best practice in evening programming, bolstered by the announcement of the \$188m reimaged Riverside Theatre which will open in 2028.

Parramatta is scoping the development of an Arts and Cultural Precinct Masterplan which will include Powerhouse, Riverside Theatres, PHIVE, Civic Link and other potential venues in Parramatta CBD.

Live Music Action Plan: In late 2024 Parramatta will deliver a live music action plan for the city. This plan will identify gaps, and strategic opportunities for investment, infrastructure and precinct planning and sector and audience development.

Visitor Economy and Night Time Economy: Parramatta continues to see an increase of visitors at night time, with evening spend of \$1.28bn, across May 2023 - April 2024, making up 22.8% of Parramatta's total consumer spend. Notably visitor spend is higher making up 63.1% of the total night spend*.

*Source: Spendmapp Geografia

PARRAMATTA'S NTE PERFORMANCE

Parramatta's Core NTE delivered positive economic results for 2023. Sales turnover increased 16% to \$1.46 billion, with employment increasing 6% to 8,730, indicating solid job creation during the period. The number of establishments increased moderately by 2% to 1,526.

For the 2022/23 period, Parramatta's Core NTE represented 5% of all establishments, 7% of employment, and 3% of sales turnover – with this position supported by strong business growth (+24%) and expenditure (+26%) since pre-pandemic in 2019.

Core NTE overview




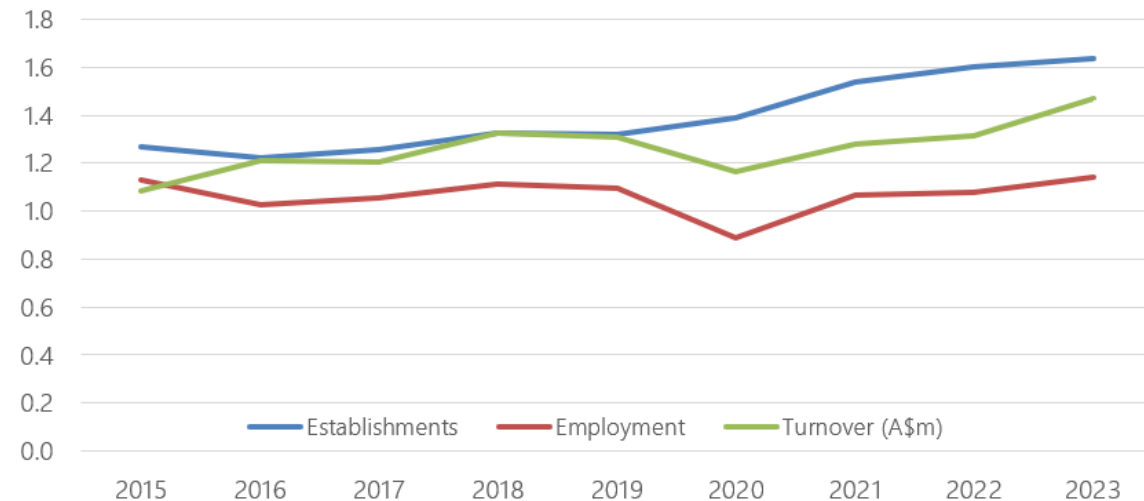
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	1,526 +2%	5%
 Employment	8,730 +6%	7%
 Sales Turnover	\$1,461m +16%	3%

Figure 48: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Food** sub-sector exhibited moderate new business growth in 2023, with establishments increasing 2% to 1,156. Employment in this sector, however, saw a strong 9% rise, reaching 5,740 employees, and sales turnover surged by 23%, reaching \$744 million, driven by strong demand for *Takeaway Food Services* and *Cafes & Restaurants*.




Conversely, the **Drink** sub-sector experienced a slight decline in 2023, with establishments decreasing 2% to 45. Employment grew marginally by 1% to 440 employees, while sales turnover increased 8%, reaching \$109 million fuelled by strong demand for *Pubs, Taverns & Bars*.

Establishment numbers expanded in the **Leisure & Entertainment** sub-sector, increasing 5% to 325. Employment saw a slight decline (-1%) to 2,550 workers, while sales turnover increased 11%, reaching \$608 million reflecting higher prices combined with consumer demand.



The number of **Accommodation** establishments grew modestly by 2% to 61 in 2023, while sales turnover saw considerable growth, rising 30% to reach \$155 million. Demand for workers during the period led employment levels to expand by 11% to 780.

The **Retail** sub-sector also performed well with sales turnover increasing 10% in 2023, totalling \$2.82 billion, while establishments (+1%) and employment (+2%) remained relatively stable indicating healthy levels of consumer retail activity.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	45 -2%	3%
 Entertainment	325 +5%	21%
 Food	1,156 +2%	76%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	1,165	+1%
 Accommodation	61	+2%

PARRAMATTA'S TRADING PATTERNS

In the City of Parramatta LGA in July 2023, the day with the highest number of consumer-facing businesses open at night is Thursday. This follows a similar pattern to other Australian cities and is driven by a higher-than-usual number of retail and hair and beauty businesses trading into the evening hours (47% of these businesses are open between 6pm and 9pm on Thursdays).

Following the Thursday peak, the number of businesses trading after 6pm trails off on Friday and over the weekend. While more Core NTE businesses open later on Friday and Saturday nights, this is not substantially different to the rest of the week.

Figure 49: Number of businesses *open at night* (at some point 6pm and 6am) – July 2023

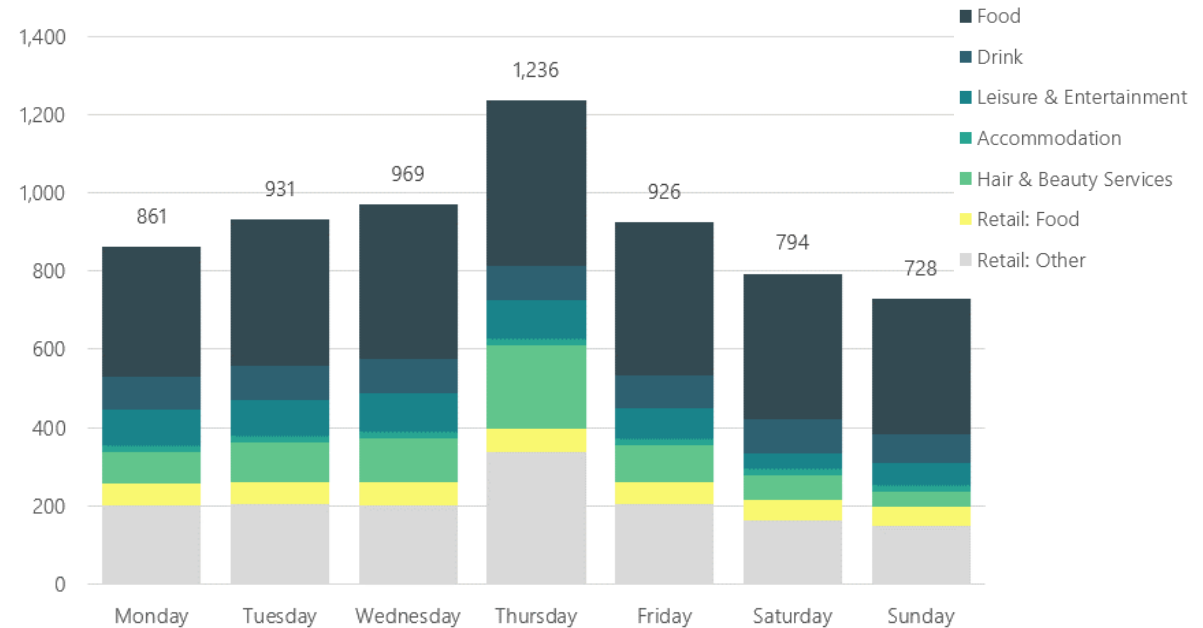


Figure 50: Proportion of all *Core NTE* businesses open (July 2023)

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	53%	27%	7%	11%
Tuesday	58%	28%	7%	11%
Wednesday	61%	30%	7%	11%
Thursday	65%	32%	7%	11%
Friday	61%	34%	8%	7%
Saturday	55%	34%	8%	6%
Sunday	47%	28%	6%	10%

Figure 51: Proportion of all *Retail* businesses open (July 2023)

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	27%	11%	5%	6%
Tuesday	27%	11%	5%	6%
Wednesday	27%	11%	5%	6%
Thursday	41%	11%	5%	6%
Friday	27%	12%	5%	5%
Saturday	22%	11%	5%	5%
Sunday	20%	10%	5%	5%

Please note that this section shows July 2023 data as per the reporting options selected by City of Parramatta Council.

PENRITH NSW

Nestled at the foothills of the majestic Blue Mountains, Penrith beckons with adventure and culture, just a 50-minute drive west from the heart of Sydney. Here outdoor enthusiasts can revel in nature's bounty, knowledge seekers can expand their horizons, and foodies can savour a tantalizing array of flavours.





WHERE IS PENRITH'S NTE LOCATED?

The location and concentration of Penrith's consumer-facing night time business activity as of July 2024, can be seen around Penrith's town centre.

An additional precinct is located to the east, along Queen Street in St Marys.

Figure 52 provides an overview of this activity, while a more detailed map can be viewed online [here](#).
See 'Using supplementary maps' (p106) for guidance.

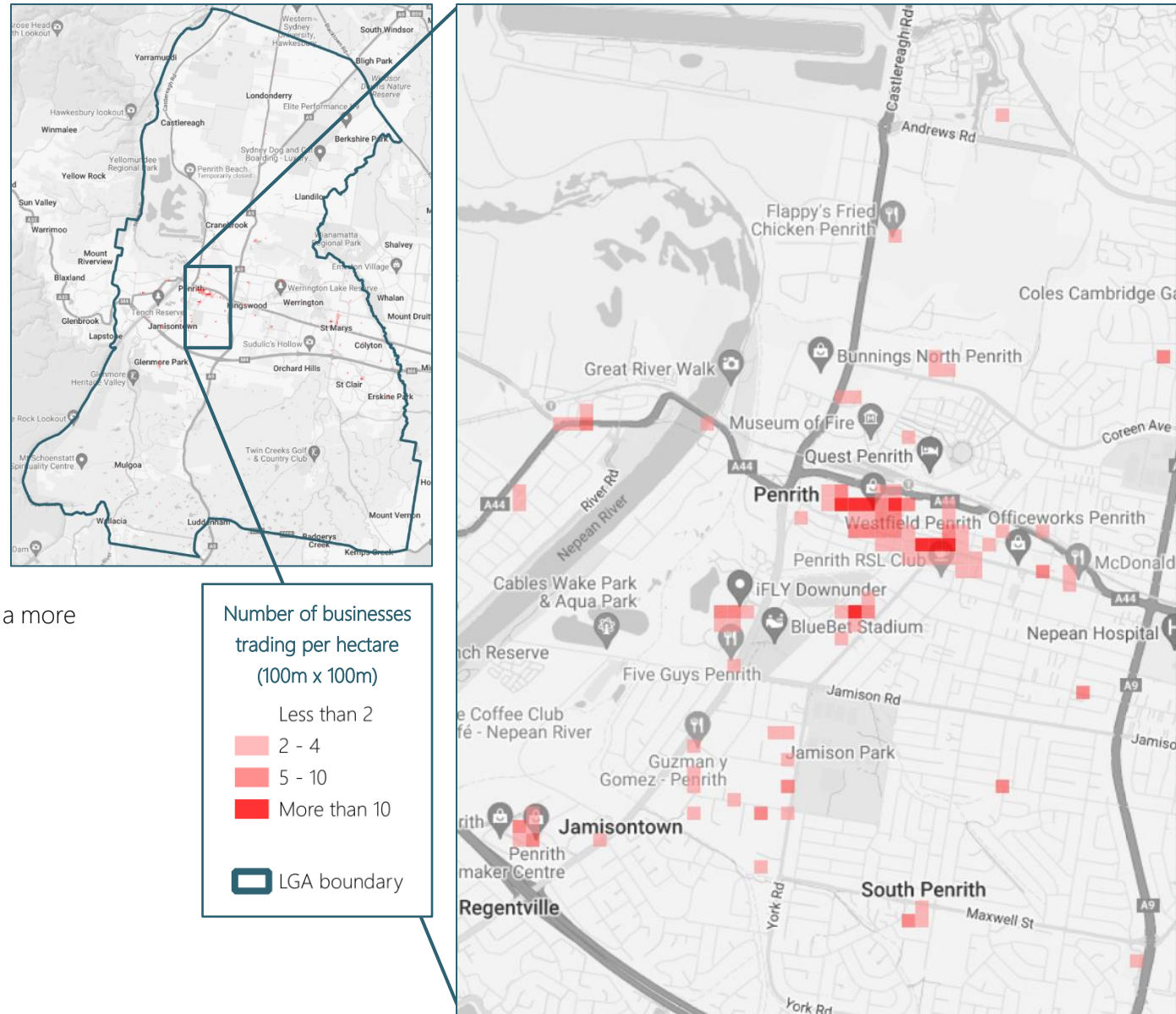


Figure 52: Penrith's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

PENRITH'S CITY INITIATIVES

Penrith City Council is committed to creating a safe, welcoming, and vibrant environment for all residents, with a focus on enhancing the night time economy. Recognising the importance of an active and vibrant night time scene, the Council has initiated several projects and events to support this objective. A key step taken is the commencement of a refreshed [Night Time Economy Strategy](#), building upon the previous 2015 Night Time Economy Study and Strategy. The new strategy will encompass both Penrith and St Marys as key strategic centres, aims to bolster the economic and social vitality of these areas during the evening and night time hours. Current night time economy actions cover:

- Collaboration
- Lighting
- Safety and amenity
- Infrastructure
- Wayfinding
- Marketing and promotion
- Events and entertainment
- Arcade trade
- Cultural/Civic Precinct
- Monitor

One of the landmark projects supporting this strategy is the construction of [City Park](#), a 7,000-square-metre green space and central meeting place located in the heart of the City Centre. This \$19 million project, funded through a combination of NSW Government grants and Council contributions, is designed to be a vibrant, inclusive area that offers opportunities for meeting, dining, recreation, and celebration. By providing a versatile and engaging environment that remains active both day and night, City Park aims to attract residents, workers, and visitors, thereby stimulating the night-time economy and enhancing the social and economic vitality of Penrith.

The Council and its City Centre Corporations team have been actively involved in the delivery of several major events. These include [ROAM](#), which attracts approximately 10,000 participants, the [St Marys Spring Festival](#) which attracts approximately 15,000 attendees, and the Penrith CBD [Magical Christmas Tree Lighting](#) event, which draws approximately 10,000 visitors. These events not only boost local businesses but also enhance the cultural and social vitality of Penrith, making it an attractive destination for evening activities.

Furthermore, the [Penrith Producers](#) activation in the City Centre continues to expand, showcasing the finest locally produced goods and enlivening the western end of the CBD. This initiative not only promotes local businesses but also attracts visitors to the area during the evening, thereby supporting the night time economy.

Safety and accessibility are paramount to the success of the night-time economy. To this end, the Council has commenced the phased delivery of a major lighting upgrade on the Nepean River Great River Walk. This enhancement facilitates greater safety and access to the River at night, encouraging more residents and visitors to enjoy the area after dark.

Through these initiatives, Penrith City Council is taking important steps towards creating a vibrant and thriving night time economy, ensuring that Penrith remains an inviting and lively place for all residents and visitors during the evening hours.

PENRITH'S NTE PERFORMANCE

Penrith's Core NTE showed solid growth in 2023, with sales turnover increasing 20% to \$571 million, and employment rising 5% to 4,195 workers. The number of establishments, however, remained stable overall with a slight increase (+2) in 2023 to 714.

Penrith's Core NTE composition currently accounts for 4% of all establishments, 6% of employment, and 2% of sales turnover in the local economy (vs 5%, 8%, and 3% nationally, respectively). Compared to pre-pandemic levels, however, Penrith's NTE shows strong increases across all areas, indicating a robust growth trajectory, and underscoring the NTE's rising importance to Penrith's economy.

Core NTE overview




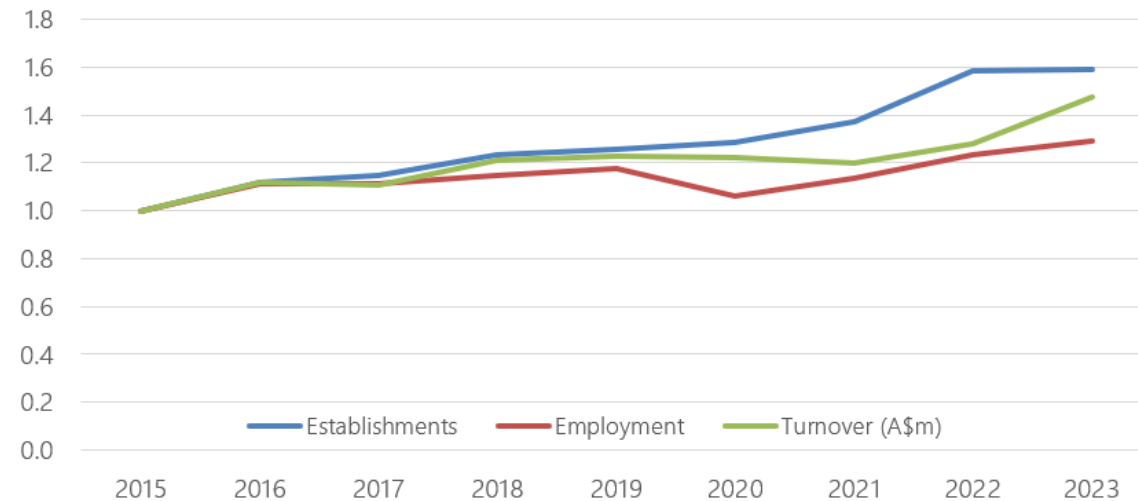
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	714 +0%	4%
 Employment	4,195 +5%	6%
 Sales Turnover	\$571m +20%	2%

Figure 53: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Food** sub-sector demonstrated strong growth in 2023, with establishments increasing 3% to 450, employment rising 8% to 2,610 employees, and sales turnover surging 22% to \$337 million. While *Takeaway Food Services* sales turnover continued to recover from its 2020 peak (+17% in 2023 vs. 2022), *Cafes & Restaurants* experienced a surge in demand to almost double pre-pandemic levels, signalling a shift in Penrith's food culture.




The **Drink** sub-sector exhibited notable financial growth in 2023 (+20%) to \$38 million, despite a stable number of establishments and a minor increase (+5%) in employment (to 225 workers). This indicates potential increased demand for drink related products and establishments.

For **Leisure & Entertainment**, establishments numbers contracted in 2023, decreasing 5% (to 237), with employment also experiencing a marginal fall (-1%) to 1,360 employees. Sales turnover, however, increased 17% to reach \$195 million, driven by strong demand for sport and recreational activities.



Establishment growth in the **Accommodation** sub-sector showed strong gains, increasing 23% to 27. This led to substantial gains in employment (+23% to 80 workers) and sales turnover (+44% to \$15 million - supported by the lifting of pandemic restrictions and associated rise in staycations).

By contrast, the **Retail** sub-sector saw the number of establishments decrease (-3%) to 526, while employment remained stable with a slight increase to 2,655 employees. Sales turnover, however, rose by 8%, totalling \$914 million.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	27 0%	4%
 Entertainment	237 -5%	33%
 Food	450 +3%	63%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	526	-3%
 Accommodation	27	+23%

PENRITH'S TRADING PATTERNS

The proportion of Core NTE businesses trading across the night remained relatively static between July 2023 and July 2024 in Penrith.

The pattern of businesses trading hours reflected 2023, with Thursday nights being significantly more active than any other night of the week. On Thursday evenings, 74% of Penrith's Core NTE businesses are open; the highest proportion of all cities analysed. Likewise, 45% of Penrith's Retail businesses are open on this evening. Thursdays provide a useful template for potential night time business activity throughout the week, showing that a focus on Non-Grocery Retail activity could drive further NTE activity.

Figure 54: Number of businesses *open at night* (at some point 6pm and 6am)

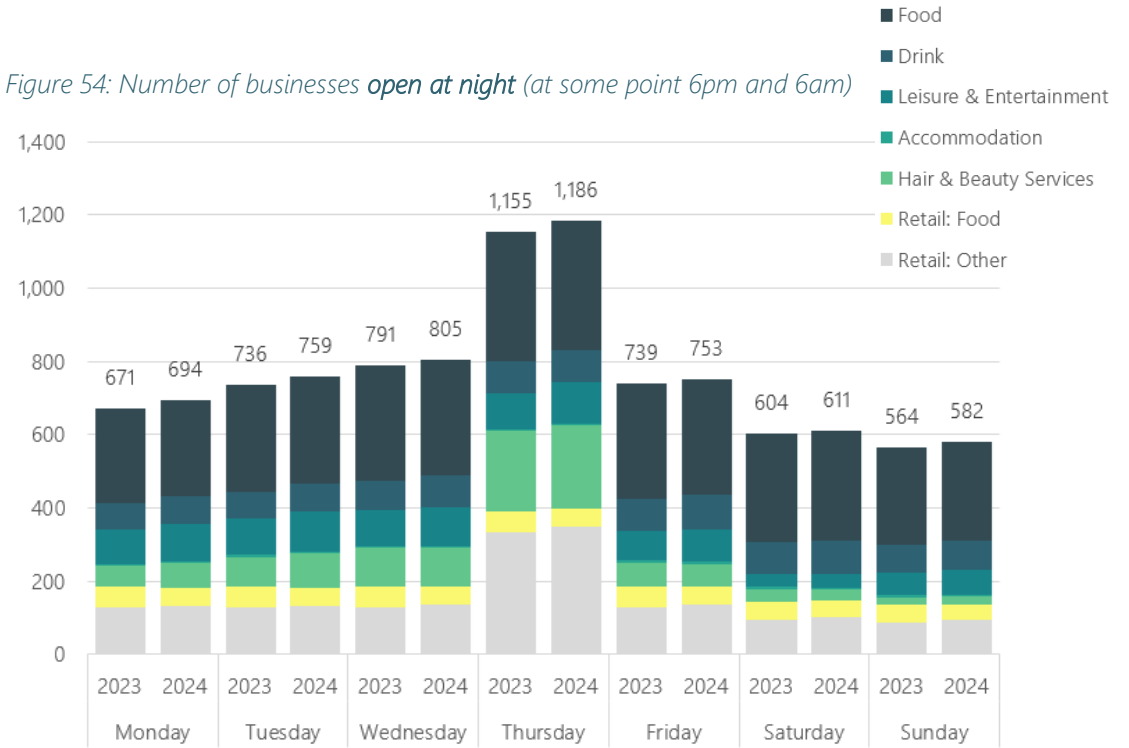


Figure 55: Proportion of all *Core NTE* businesses open

Weekday (6pm-6am)	→ Night rolls into next day →		Late-Night 12am-3am	Early-hours 3am-6am
	Evening 6pm-9pm	Early-Night 9pm-12am		
Monday	58%	22%	9%	14%
Tuesday	63%	23%	8%	14%
Wednesday	67%	26%	9%	14%
Thursday	74%	28%	9%	14%
Friday	67%	33%	11%	9%
Saturday	58%	33%	11%	8%
Sunday	50%	23%	7%	13%

Figure 56: Proportion of all *Retail* businesses open

Weekday (6pm-6am)	→ Night rolls into next day →		Late-Night 12am-3am	Early-hours 3am-6am
	Evening 6pm-9pm	Early-Night 9pm-12am		
Monday	20%	8%	5%	6%
Tuesday	20%	8%	5%	6%
Wednesday	21%	8%	5%	6%
Thursday	45%	9%	5%	6%
Friday	20%	8%	5%	6%
Saturday	16%	8%	4%	5%
Sunday	15%	7%	5%	6%

PERTH WA

Australia's most geographically unique capital city boasts an extensive and diverse array of bars, restaurants, shopping opportunities, entertainment and recreational experiences for all residents, workers and visitors. With a focus on increasing residential density, the City of Perth's residential development incentives will deliver more facilities, business opportunities, and continue to offer a thriving and vibrant capital of Western Australia both day and night.





WHERE IS PERTH'S NTE LOCATED?

In the City of Perth in July 2024, concentrations of consumer-facing night time business activity can be found trading in the evening (6pm to 9pm) around Perth's CBD and Northbridge.

Smaller pockets of activity include:

- Surrounding the Murray Street Mall, at the intersection of Murray Street and Barrack Street
- Around Watertown Brand Outlet Centre in West Perth
- Along Bennett Street in East Perth; and
- Around Broadway Fair Shopping centre to the west of the LGA.

Figure 57 provides an overview of this activity, while a more detailed map can be viewed online [here](#).

See 'Using supplementary maps' (Appendix p106) for guidance.



Figure 57: Perth's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

PERTH'S CITY INITIATIVES

Perth's night-time economy is one of the strongest in the nation. Businesses are well supported by the City of Perth, which has several levers at its disposal to encourage people to visit the city at night. Those levers include:

Free night-time parking

Since 2022, night-time parking in every City of Perth car bay has been free, seven days a week after 6pm. This is part of a \$10 million incentive that attracts people to the city and encourages them to stay longer and spend more while they are here.

Business Improvement Grants

In 2022/23, the City awarded more than \$350,000 in Business Improvement Grants for businesses to upgrade and refresh their outdoor dining areas, enhance laneways and install creative feature lighting. Not only does this improve Perth's streetscapes but it enhances safety and vibrancy by encouraging outdoor dining and activity.

Safety improvements

In addition to the grants, the City is delivering the Light it Up program which sees lightning installations placed in key laneways across the city to enhance vibrancy and safety.

The safety improvements across the City were supported by the "See it, Say it" campaign which encourages people to report antisocial and criminal behaviour.

Major events

Nothing attracts people to a city like events and the City of Perth commits around \$11 million a year to event delivery and sponsorship. For example, in 2022/23, the month-long Fringe World and Perth Festival events have attracted over 770,000 visitors and more than \$47 million in economic impact.

The City of Perth also delivered the annual Christmas Lights Trail which included 35 installations and attracted more than 384,600 visitors, highlighting Perth's busiest NTE activity. This was followed by six City of Light shows, attracting more than 130,000 people.

Lightscape powered by the City of Perth was another unique night-time experience which

attracted more than 180,000 people to the city NTE during winter.

Finally, the City launched Plateful Perth in 2023 – a month-long dining campaign to encourage people to dine out in the City. Running throughout August, the campaign generated a 13.7 per cent increase in consumer spending (YOY)

The City of Perth continues to work collaboratively with event promoters to maximise large scale NTE event opportunities. It recently hosted the largest Australian set of DJ Fred Again, which saw 35,000 visitors to the City for the event. The success of this event encouraged the City of Perth to explore further opportunities in this space.

Finally, Perth's annual retail study has shown that the number of night-time economy businesses is increasing. Restaurants, cafes, takeaway food, pubs, taverns and bars make up nearly 50 per cent of all city retail and will be strong drivers of future demand and NTE activity.

PERTH'S NTE PERFORMANCE

For the 2022/23 period, Perth's Core NTE experienced robust growth in 2023, with sales turnover substantially increasing (+21%) to \$1.56 billion, and the number of establishments growing (+4%) to 672. Employment, however, experienced a slight decrease in 2023 (-1%) to 11,180, indicating potential challenges in hiring or retaining staff during the period.

Perth's Core NTE represents 5% of all establishments, 9% of employment, and 3% of sales turnover in the local economy – similar to national levels (5%, 8% and 3% respectively). Since 2019, Perth's Core NTE has shown considerable turnover (+41%) and employment growth (+12%) - outstripping national growth levels.

Core NTE overview




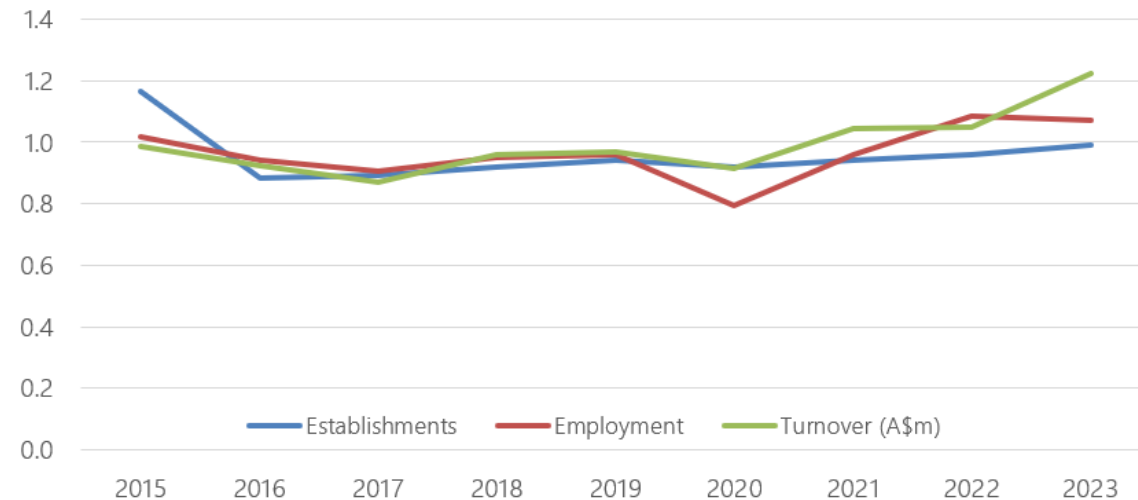
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	672 +4%	5%
 Employment	11,180 -1%	9%
 Sales Turnover	\$1,565m +21%	3%

Figure 58: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Leisure & Entertainment** sub-sector showed strong performance in 2023. Establishments increased 5% (to 98), and employment saw a robust rise of 16% to 1,700 workers. Strong sales turnover growth in *Creative & Performing Arts, Gambling Activities, Clubs (Hospitality), and Sports & Physical Recreation activities* led sales turnover in the sub-sector to expand 28%, reaching \$292m.




Employment in the **Food** sub-sector slightly contracted in 2023 (-4%) to 6,820 workers, while establishments grew 3% (to 466). Sales turnover, however, surged 20% to reach \$890m, driven by *cafés and restaurants*.

The **Drink** sub-sector maintained stable establishment growth in 2023, rising 6% to 108, while employment saw a slight decline of 3% to 2,660 workers. Despite these opposing trends, sales turnover increased significantly (+20%) to \$383m – led by *Pubs, Taverns & Bars* (+20% / +\$60m).



In the **Retail** sub-sector, the number of establishments decreased 4% to 275, while employment saw an increase of 3% to 3,805 employees. Over the same period, sales turnover rose 7% to \$1.23 billion.

The **Accommodation** sub-sector experienced solid sales turnover growth (+36%, supported by the lifting of pandemic restrictions and associated rise in staycations) to \$955m, despite a historically subdued and fluctuating performance in the years prior to this. There was, however, a reduction in establishments (-5%) to 91 combined with a 6% decline in employment (to 4,790 workers).

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	108 +6%	16%
 Entertainment	98 +5%	15%
 Food	466 +3%	69%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	275	-4%
 Accommodation	91	-5%

PERTH'S TRADING PATTERNS

In 2024, Perth experienced modest gains in the proportion and number of businesses operating between the hours of 6pm and 6am. Fridays was once again the night with the highest levels of business active, driven by a higher number of Retail, and Hair & Beauty businesses trading into the evening hours. Sunday night continues to have the fewest number of businesses operating at night.

When compared to most other capital cities in Australia, Perth has a lower proportion of Food, Drink and Entertainment businesses trading in the evening, but a higher proportion operating during the early night time hours.

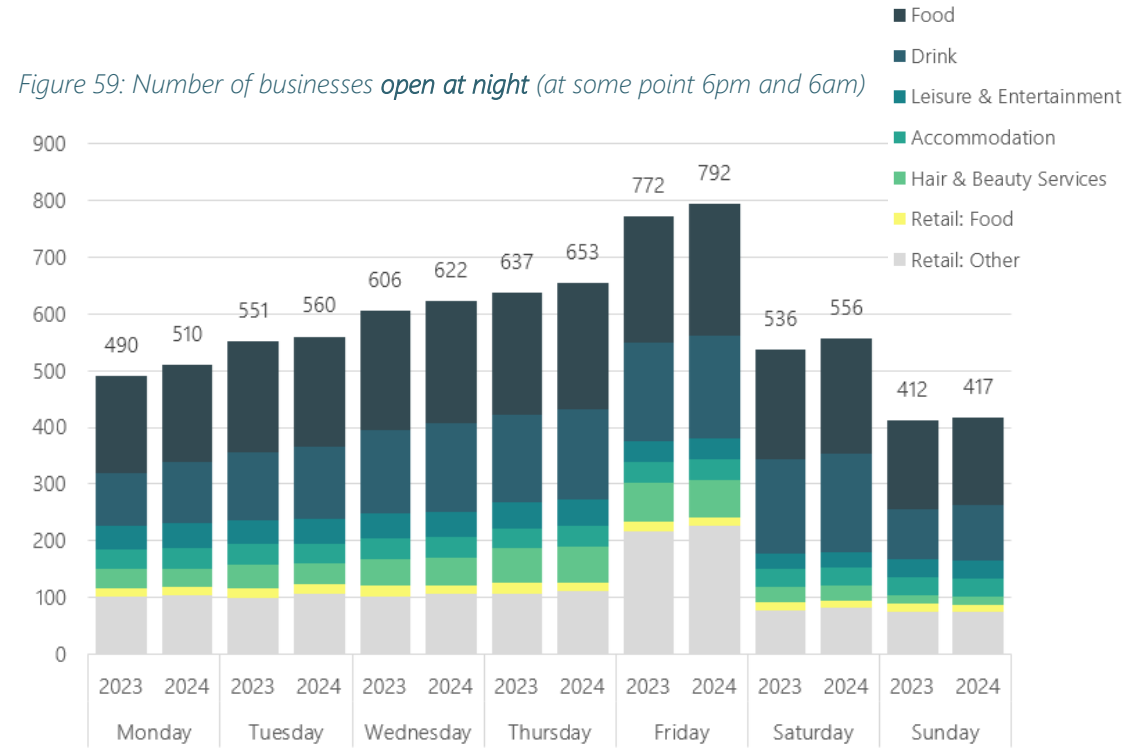


Figure 60: Proportion of all *Core NTE* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	40%	22%	5%	6%
Tuesday	45%	26%	5%	6%
Wednesday	51%	31%	6%	7%
Thursday	53%	32%	6%	7%
Friday	55%	40%	13%	7%
Saturday	49%	39%	13%	7%
Sunday	34%	22%	5%	6%

Figure 61: Proportion of all *Retail* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	21%	13%	8%	7%
Tuesday	22%	13%	8%	7%
Wednesday	21%	13%	8%	7%
Thursday	22%	13%	8%	8%
Friday	43%	14%	10%	8%
Saturday	17%	14%	8%	6%
Sunday	15%	11%	7%	7%

SYDNEY NSW

The glittering harbour city, with global attractions, diverse nightlife catering to all tastes and a thriving arts and culture scene. When combined with its world-class dining and bar selections, the modern icon offers it all.





WHERE IS SYDNEY'S NTE LOCATED?

In July 2024, most of Sydney's night time businesses are clustered around the north. Particularly dense pockets of activity can be found where safe and convenient transport options are available, such as areas near train stations and along light rail lines, including:

- around the city centre, from the Rocks in the north to Chippendale in the south
- other 24-hour trading areas in Potts Point and Oxford Street, Darlinghurst
- the high streets and local centres of Surry Hills, Redfern, Pyrmont/Ultimo, Glebe, Newtown, Erskineville, and East Village in Zetland.

Figure 62 provides an overview of this activity, while a more detailed map can be viewed online [here](#).

See 'Using supplementary maps' (p106) for guidance.

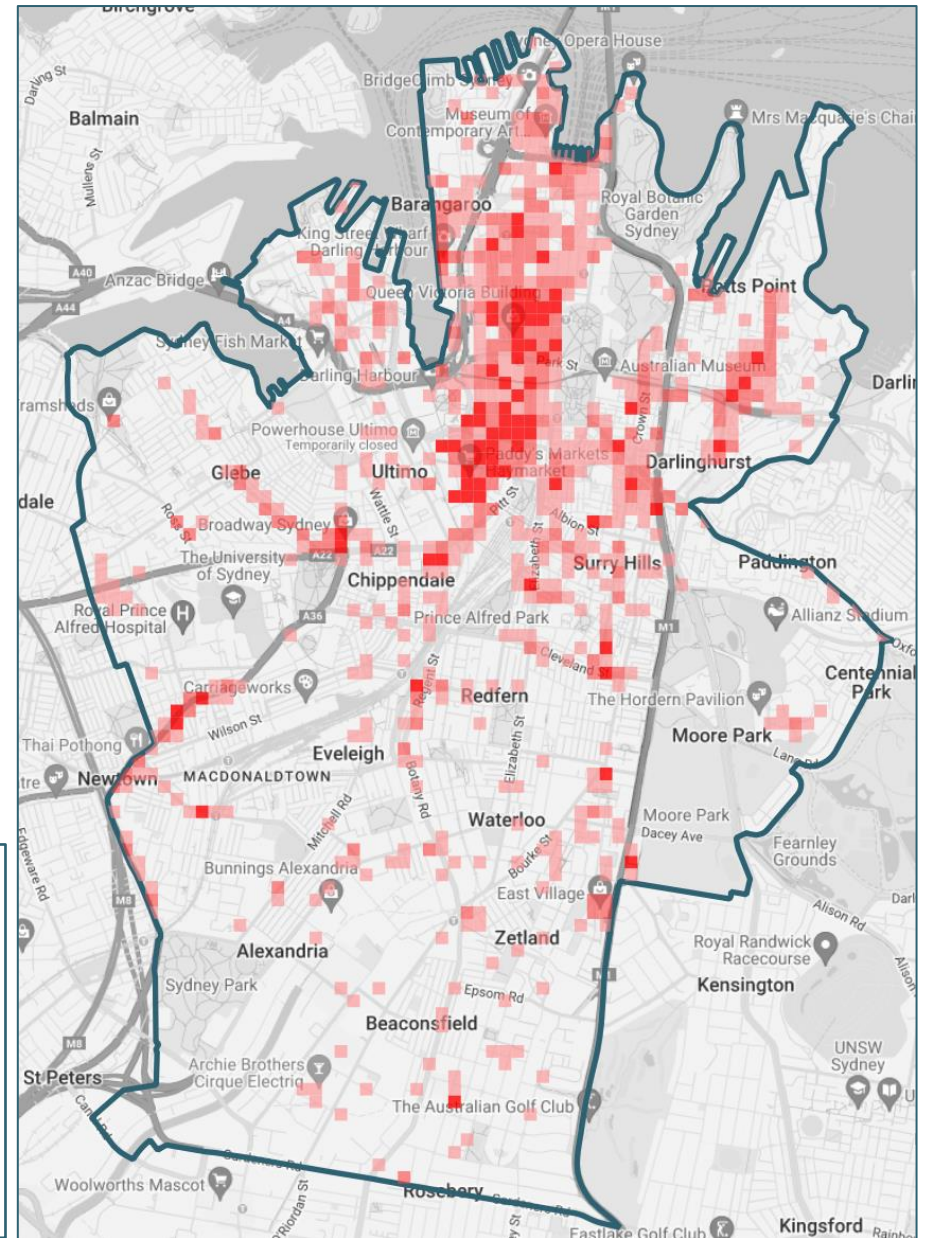
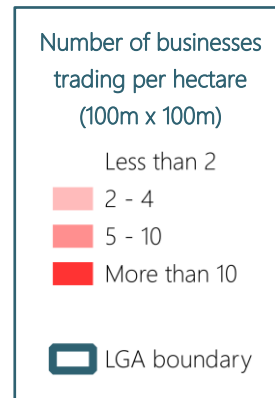


Figure 62: Sydney's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

SYDNEY'S CITY INITIATIVES

A city that embraces the night, celebrates creativity and invites everyone to be part of the experience. Sydney continues to position itself as a global night time city, with a commitment to a thriving night time economy, cultural vibrancy and its global status. Sydney is a city that truly comes alive after dark.

During the 2022/2023 financial year, the City of Sydney continued its focus on promoting and developing a vibrant, diverse and inclusive 24-hour economy. Through liquor accords, business chambers and industry associations, the City worked with night time businesses to understand their needs and provide support, programs and resources.

With the local economy evolving post-pandemic, the City continued to encourage businesses to take advantage of later trading hours. Twenty-four hour trading was available across the entire city centre with extended trade allowed for low-impact businesses in other main streets. Diverse late-night options were driven by people wanting more experiences, creative events and cultural activities.

The City piloted its first Sydney Streets series, which saw six local high streets successfully transformed for a day into spaces for walking, shopping and dining. Support for outdoor dining continued with more than \$7.2 million in fees waived since November 2020 a move extended until June 2025. Through the outdoor dining program, more than 630 applications were approved, with 164 requests to reallocate 2,000m² of road space to outdoor dining, and a further 474 applications to reallocate 5,818m² of footpath space.

Precinct activation grants saw \$3 million funding collaborative partnerships between businesses, creatives and communities to activate businesses and public places with cultural programming. These programs included laneway festivals, curated live performances and markets.

Sydney WorldPride took place from 17 February to 5 March 2023 and was supported by more than \$1.75 million in cash and in-kind support (reduced or waived fees) from the City of Sydney. Support for planning and production included pride-themed street signs, LGBTIQ+ murals and hoarding artwork on Oxford Street, the queer epicentre of Sydney. The festival contributed \$185.6

million to the NSW economy and supported 1,699 jobs. More than 470 events were held across the two week festival period, supporting over 7,000 artists and providing 3,450 people with volunteer opportunities.

The City also provided just over \$300,000 in funding to live music and performance, and night time diversification events through business support grants.

Capacity-building programs continued to be a success. The Reboot series took on its fourth year with free lunchtime webinars where leading business experts shared inspiring stories and practical tips across a range of topics. A 12-week business innovation program, Ready, Set, Grow, moved into its fifth year of challenging how business owners look at their brands and explore opportunities to embrace some of the latest trends.

The 2022/2023 financial year was significant for the City of Sydney, as efforts were focused on the revitalisation of the night time economy and support continued to promote cultural celebrations and economic growth. A commitment to fostering a vibrant and inclusive community shines through.

SYDNEY'S NTE PERFORMANCE

Sydney's Core NTE showed substantial growth from 2022 to 2023, with sales turnover increasing 20% to \$5.67 billion and employment growing 6% to 36,080 workers. The number of establishments decreased slightly by 1% to 5,896.

In 2022/23, Core NTE businesses account for 11% of all establishments, 7% of employment and 4% of the area's total economy. Compared to pre-pandemic levels, Sydney's NTE has demonstrated strong recovery, particularly in sales turnover, with a 25% increase since 2019. Employment has almost recovered to pre-pandemic levels, with only 0.2% fewer jobs in 2023 than 2019. This reflects a vibrant and resilient sector despite the slight reduction in establishments.

Core NTE overview




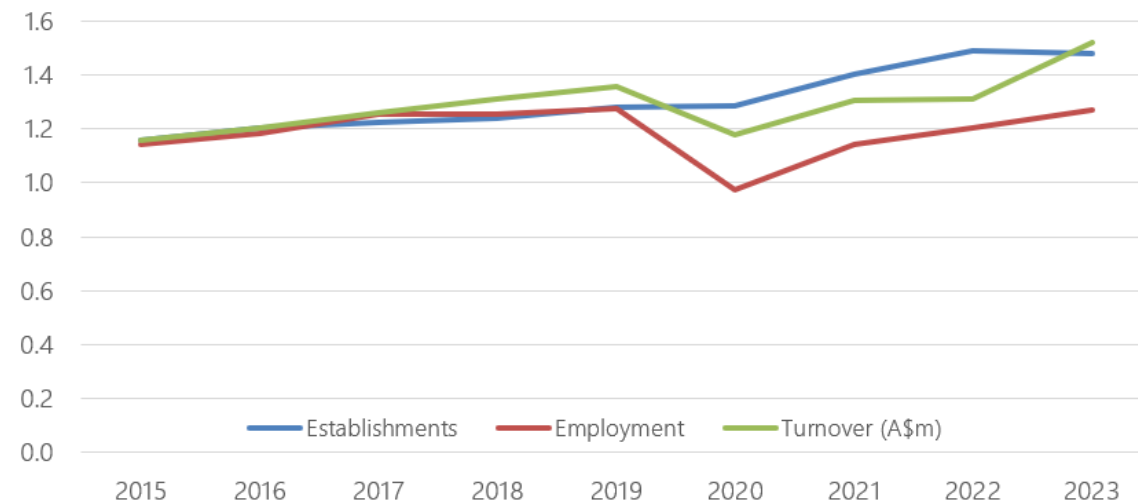
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	5,896 -1%	11%
 Employment	36,080 +6%	7%
 Sales Turnover	\$5,669m +20%	4%

Figure 63: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Food** sub-sector demonstrated robust performance in 2023. While the number of establishments remained stable (4,092), employment rose by 8% to 22,560 employees and sales turnover increased 21% to \$3.2 billion, with *Cafes & Restaurants* accounting for more than 90% of this value.




The **Drink** sub-sector maintained overall stability in the number of establishments, declining -0.4% to 732. Employment increased 10% to 5,690 employees, while sales turnover grew strongly by 21%, reaching \$978 million. This was driven by a shift away from *Liquor Retailing* towards *Pubs, Taverns & Bars*: an increase of 38 establishments, 555 workers, and \$158 million.

There was mixed performance in the **Leisure & Entertainment** sub-sector. Establishments decreased 4% to 1,072, and employment declined 2% to 7,825 workers. Despite this, sales turnover increased 18% to \$1,450 million – driven by a recovery in *Creative & Performing Arts* sales turnover towards its pre-pandemic 2019 peak, following declines in 2021 and 2022.



The **Accommodation** sub-sector exhibited impressive growth, with sales turnover surging 30% to \$1,529 million, employment expanding 11% to 8,805 workers and a 3% increase in establishments to 571.

Retail experienced a slight decline of 2% in establishments to 2,631, while employment experienced a modest increase of 1% to 22,380. Sales turnover performed well, rising 8% to reach \$7.25 billion

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	732 -0%	12%
 Entertainment	1,072 -4%	18%
 Food	4,092 +0%	69%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	2,631	-2%
 Accommodation	571	+3%

SYDNEY'S TRADING PATTERNS

In July 2024, a higher proportion of Core night time businesses were trading from 6pm to 6am, compared to the same time a year prior. From Saturday to Wednesday, the proportion of Core NTE businesses operating increased by 1-2 percentage points, while the percentage trading on Thursday and Fridays remained static between the two time periods.

Like 2023, Thursday again had the highest number of consumer-facing businesses open at night, driven by Drink as well as Hair and Beauty Services.

Figure 64: Number of businesses *open at night* (at some point 6pm and 6am)

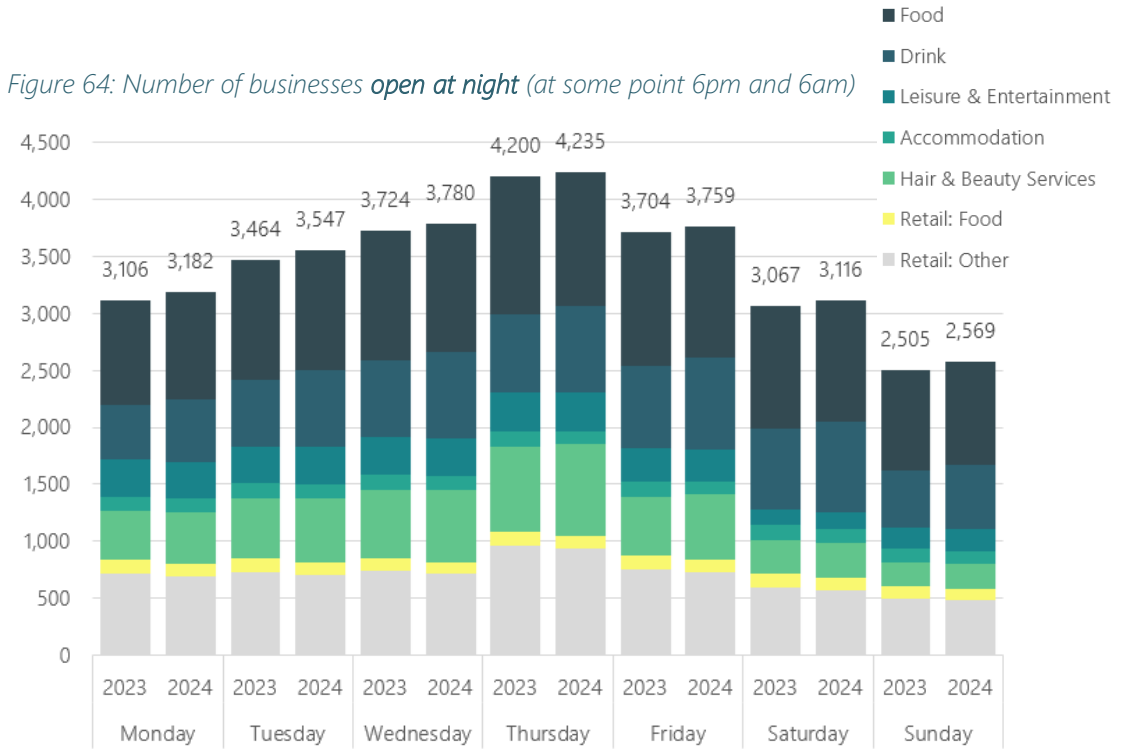


Figure 65: Proportion of all *Core NTE* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	49%	29%	7%	9%
Tuesday	56%	34%	8%	9%
Wednesday	60%	38%	8%	9%
Thursday	62%	40%	9%	9%
Friday	61%	44%	13%	7%
Saturday	55%	43%	13%	7%
Sunday	43%	29%	7%	8%

Figure 66: Proportion of all *Retail* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	31%	14%	7%	7%
Tuesday	32%	14%	7%	7%
Wednesday	32%	14%	7%	7%
Thursday	41%	14%	7%	7%
Friday	33%	14%	7%	6%
Saturday	26%	14%	7%	6%
Sunday	22%	13%	6%	6%



WILLOUGHBY NSW

Willoughby is situated in Northern Sydney. It is centred around Chatswood CBD, which is the economic, cultural and retail heart of Sydney's North Shore, with a well-educated and skilled work force. Chatswood CBD is a family-orientated destination, with The Concourse performing arts complex and the Zenith Theatre, a diverse retail offering and array of multi-cultural restaurants, cafes and entertainment venues, with excellent and accessible transport options.



WHERE IS WILLOUGHBY'S NTE LOCATED?

In the City of Willoughby in July 2024, the location and concentration of consumer-facing night time businesses can be seen in Chatswood centre, which hosts both the Chatswood Chase and Westfield Chatswood shopping centres, as well as NTE destinations such as The Interchange, The Mandarin Centre and Chatswood Place/The Mix.

Other clusters of night time economy activity can be found dotted around the LGA, including:

- Artarmon,
- Willoughby,
- Northbridge and,
- St Leonards.

Figure 67 provides an overview of this activity, while a more detailed map can be viewed online [here](#).

See 'Using supplementary maps' (p106) for guidance.

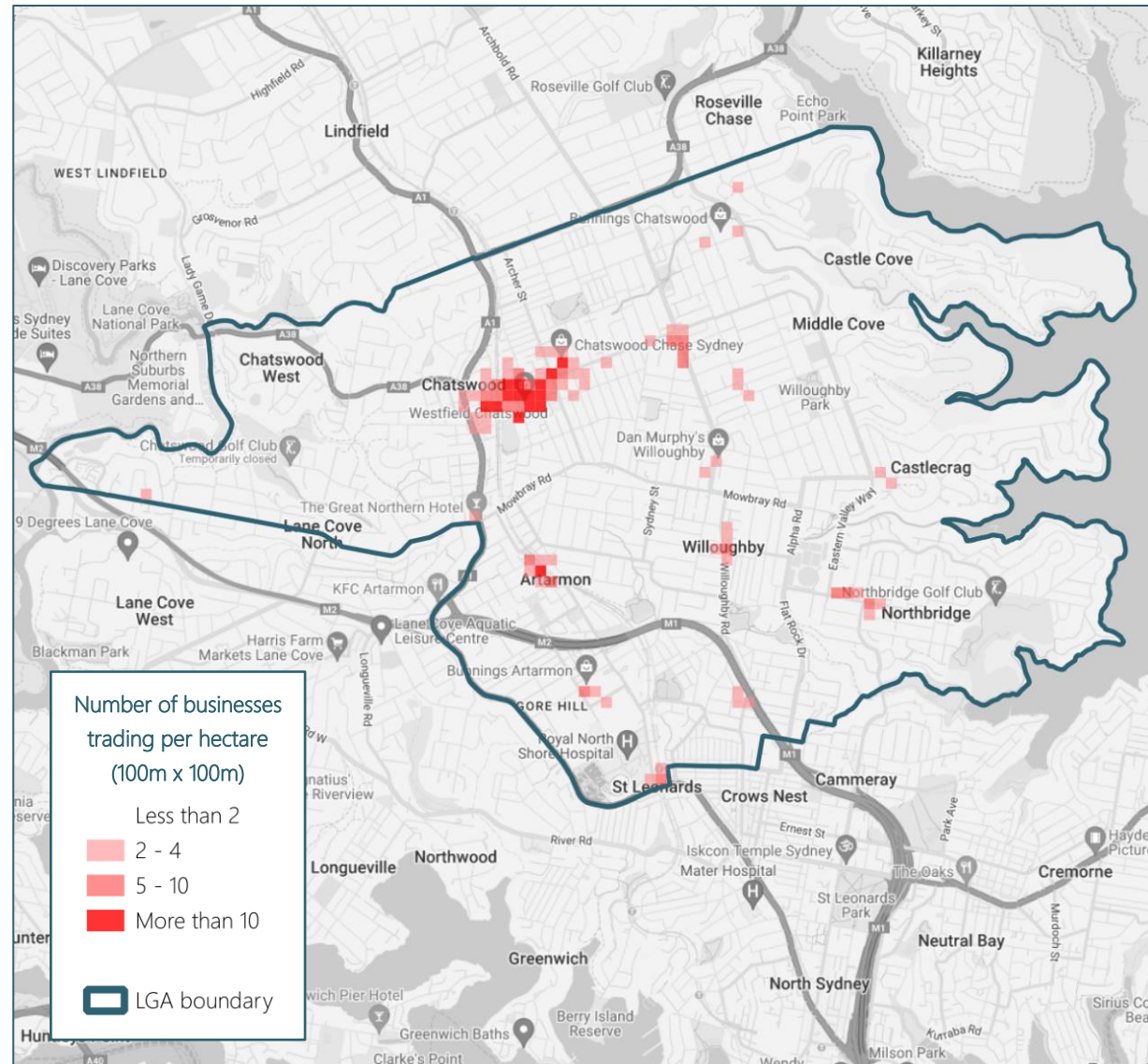


Figure 67: Willoughby's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

WILLOUGHBY'S CITY INITIATIVES

The City of Willoughby is a culturally diverse local government area situated in Northern Sydney, 10km from the Sydney CBD. It is made up of distinct local centres and residential suburbs covering 23 square kilometres and has a population of 78,000.

With a gross regional product of \$12.64 billion, the area provided 71,925 jobs in 2023 and is home to over 13,000 local businesses.

Chatswood CBD is regarded as the economic and cultural heart of Sydney's North Shore. It is a family-orientated destination, with The Concourse performing arts complex and Zenith Theatre, a diverse retail offering and array of multi-cultural restaurants, cafes and entertainment venues, a well-educated and skilled work force, and excellent and accessible transport options.

Alongside Chatswood CBD, the City of Willoughby includes a blend of retail, commercial, industrial, residential, institutional, and recreational districts. Willoughby's local centres including Artarmon, Naremburn, Northbridge, Willoughby Road, High Street, Penshurst Street North, Castlecrag, Castle Cove, Victoria

Avenue and Mowbray Road also have many other great restaurants, pubs and craft breweries to enjoy meeting friends and family and dining out.

Willoughby City Council's City Initiatives

Willoughby's Economic Development Strategy identifies six economic outcomes for the city:

1. Facilitate the development of all businesses.
2. Build and support a night-time economy.
3. Create memorable food destinations.
4. Attract visitors and promote local, destination-based tourism.
5. Diversify the economy including creative and innovative industries.
6. Facilitate the viability and vibrancy of Willoughby's village centres.

Willoughby City Council launched its Night-Time Economy Strategy in 2023, centred on the Chatswood CBD. It is working with the local business community to grow the local night-time economy, including increasing activities, events, jobs and the number of businesses operating in the evening.

The Council has developed a range of specific cultural initiatives and programs to contribute to a vibrant local night-time economy including:

- The Chatswood Mall Market, which takes place weekly on Thursdays, Fridays and Saturdays from 9am to 9pm
- Regular performances at The Concourse and Zenith Theatres throughout the year, including from the Willoughby Symphony Orchestra and Willoughby Theatre Company.
- Council's curated Culture Bites program which hosts events and activities throughout the year.
- Annual cultural festivals such as Lunar New Year and the Emerge Festival, which showcases new and local talent
- The Public Art walk around Chatswood and art exhibitions at The Concourse.
- Japanese, Korean, vegetarian, dessert and Taiwanese Food trails in Chatswood.

WILLOUGHBY'S NTE PERFORMANCE

Core NTE sales turnover in Willoughby increased substantially in 2022/23 (+19%), contributing \$521 million to the local economy. Employment also performed well over the period, growing 5% to 3,780, while the number of establishments remained stable, slightly increasing to 671.

Willoughby's Core NTE represents 5% of all establishments, 6% of employment, and 2% of sales turnover in the local economy. This is slightly below the national average (5%, 8% and 3% respectively), but when compared to pre-pandemic levels, Willoughby's NTE has shown substantial growth, particularly in sales turnover, suggesting an increasing importance.

Core NTE overview




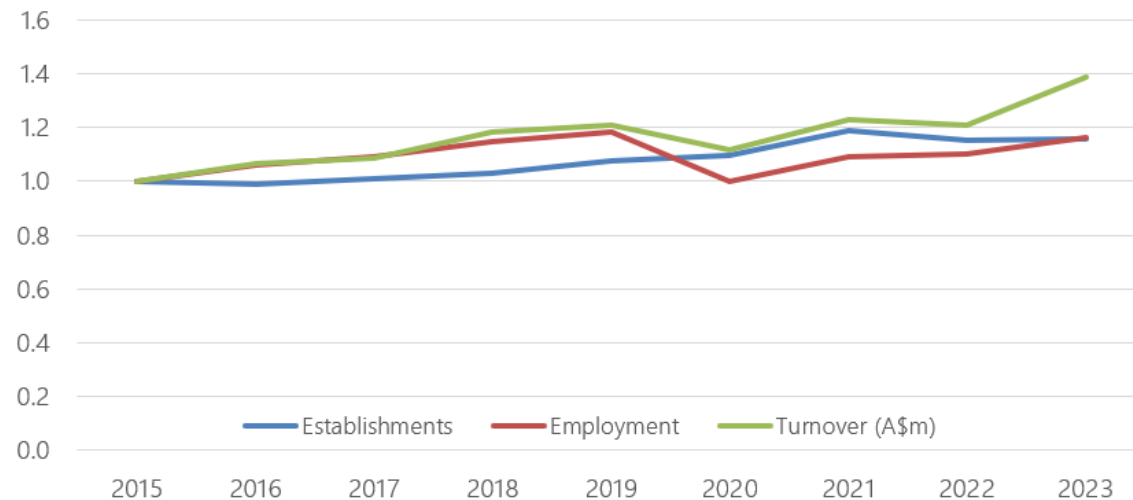
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	671 +0%	5%
 Employment	3,780 +5%	6%
 Sales Turnover	\$521m +19%	2%

Figure 68: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

The **Food** sub-sector showed strong performance between 2022 and 2023. While the number of establishments remained unchanged at 462, employment rose 7% to 2,770 employees and sales turnover increased 20%, totalling \$371 million. This was driven by surging demand for *Cafes & Restaurants* (+\$53m in 2023 and an average 10% per annum growth since 2015).




By comparison, the **Leisure & Entertainment** sub-sector saw modest growth. Establishments slightly increased (+1%) to 181, as did employment (+2%) to 750 workers. Sales turnover, however, strongly increased (+23%) to \$102 million, driven by increases in the *Creative & Performing Arts* and *Sports and Physical Recreation Activities*.

Establishment numbers in the **Drink** sub-sector in 2023 were maintained (at 28), while growth in *Pubs, Taverns & Bars* saw overall employment increase by 4% to 260, and sales turnover increased 10% to reach \$48 million.



The **Accommodation** sub-sector saw strong growth across all metrics, with a 16% increase in establishments (to 36), a 13% rise in employment to 425 employees and a 32% surge in sales turnover leading the sector to generate \$76 million in 2023.

There was modest change for **Retail**, with establishments slightly declining (2 fewer) to 458, while employment saw a modest increase of 2% to 2,840 employees. Sales turnover, however, rose by 10% with the sub-sector generating \$976 million in 2023.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	28 0%	4%
 Entertainment	181 +1%	27%
 Food	462 0%	69%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	458	-0%
 Accommodation	36	+16%

WILLOUGBY'S TRADING PATTERNS

Willoughby's busiest night of the week in terms of the number of businesses trading is, by far, Thursday. This spike in activity is driven by additional Retail businesses opening into the evening but is also supported by more than usual Hair & Beauty Service businesses and Food businesses opening during these hours. This peak in weekday activity is a useful indicator as to what expanded night time economy activity could look like in the LGA, depending on businesses' motivations and consumer demand.

As with most other cities analysed, Sunday is the quietest night of the week in terms of the number of businesses trading between 6pm and 6am.

Figure 69: Number of businesses *open at night* (at some point 6pm and 6am)

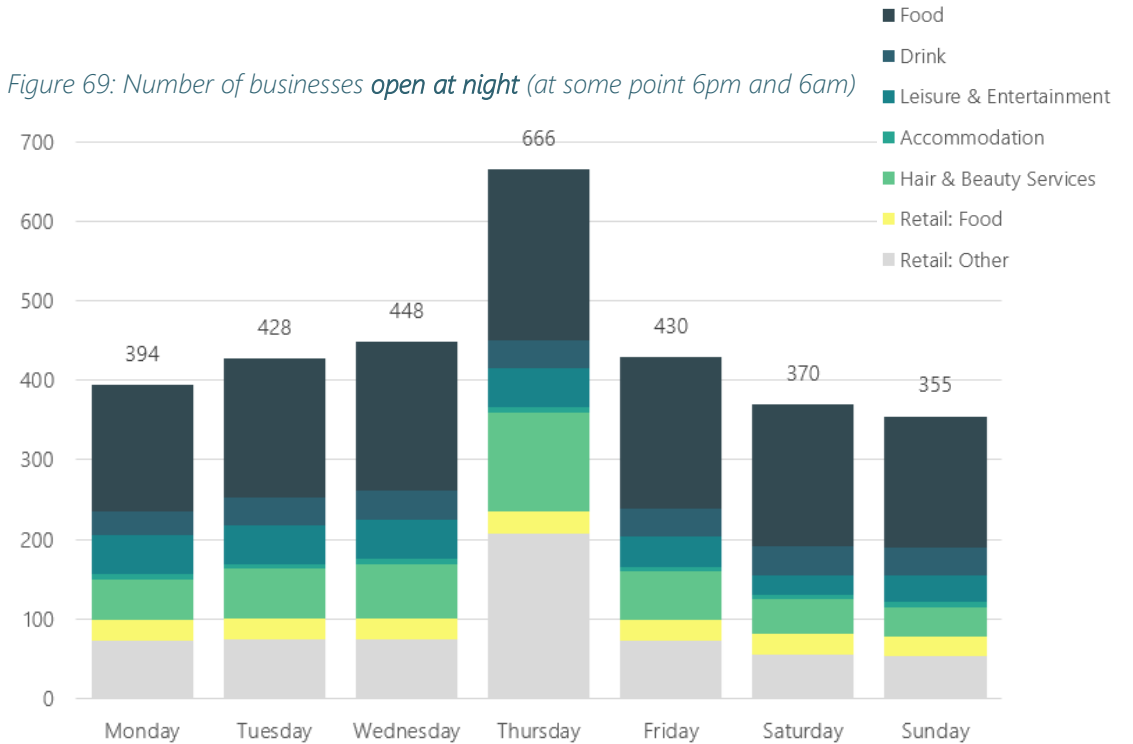


Figure 70: Proportion of all *Core NTE* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	51%	17%	5%	8%
Tuesday	55%	21%	5%	8%
Wednesday	58%	23%	5%	8%
Thursday	64%	24%	5%	8%
Friday	57%	26%	6%	4%
Saturday	52%	26%	5%	4%
Sunday	47%	20%	4%	8%

Figure 71: Proportion of all *Retail* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	18%	7%	3%	3%
Tuesday	18%	7%	3%	3%
Wednesday	19%	7%	3%	3%
Thursday	44%	7%	3%	3%
Friday	18%	7%	3%	3%
Saturday	15%	7%	3%	3%
Sunday	14%	7%	3%	3%

YARRA VIC

The Yarra City Council region takes in three of Melbourne's most iconic suburbs, which broadly include Richmond, Collingwood and Fitzroy. These suburbs host some of the city's most exciting and diverse night time activities, which attract visitors from around the world.





WHERE IS YARRA'S NTE LOCATED?

As of July 2024, the concentrations of the City of Yarra's consumer-facing night time business activity trading during the evening (6pm to 9pm) are widely distributed across the LGA, following key roads.

Key concentrations occur along:

- Swan Street, Bridge Road and Victoria Street in Richmond
- Smith Street and Gertrude Street in Collingwood
- Brunswick Street in Fitzroy
- St Georges Road in Fitzroy North
- Nicholson Street in Carlton North, and
- Queens Parade in Clifton Hill.

Figure 72 provides an overview of this activity, while a more detailed map can be viewed online [here](#).
See 'Using supplementary maps' (p106) for guidance.

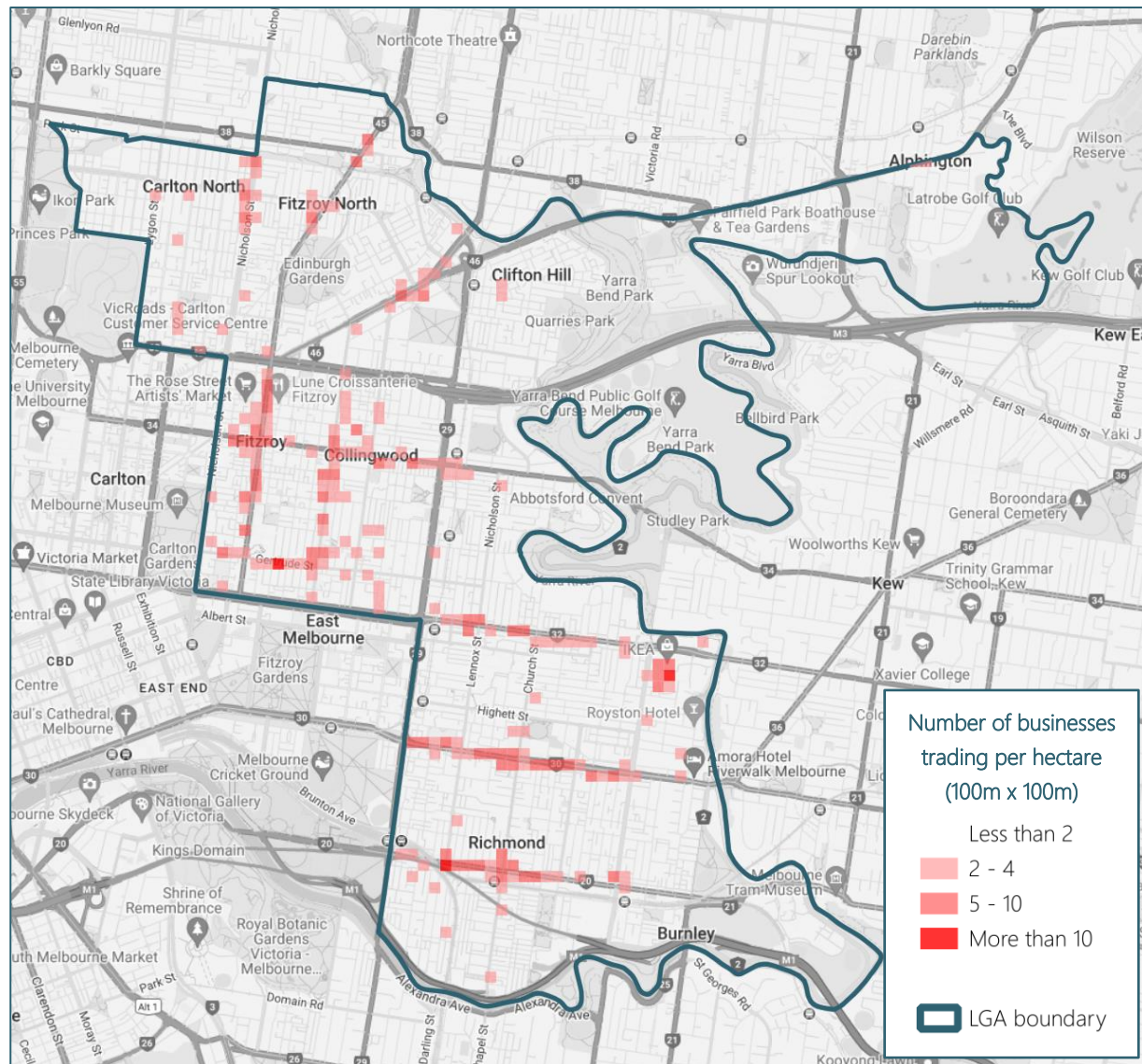


Figure 72: Yarra's evening (6pm-9pm) Core NTE, Retail, Hair & Beauty Services business concentrations

YARRA'S CITY INITIATIVES

Yarra Council has committed to supporting all industries that make up the Night Time Economy, with a number of support programs in operation, as well as a number of new initiatives being set out in the upcoming Council Plan and Economic Development Strategy 2026-2030.

CURRENT SUPPORT

Yarra City Arts supports the city's night time economy by delivering festivals and events via funding, producing and facilitating key creative activations and projects including the annual [Leaps and Bounds Music Festival](#) which supports venues to present gigs when trade is slow in winter. The Council also supports other major cultural festivals including the [Gertrude Street Projection Festival](#), [Victoria Street Lunar Festival](#), and [Johnston Street Fiesta](#). Strategic partnerships have also been developed, such

as the new [Live Music Locator](#) service which assists people in discovering what live music offerings are available across every genre on any given night in the local government area.

Additionally Yarra City Council have a [grants program](#) that support creative outcomes throughout the city, drawing people in to a range of events including exhibitions, performances and live music.

Yarra is one of only a few Councils who have an adopted [Parklet Policy](#), enabling eligible hospitality businesses to apply for a permit to convert on street parking bays, into extended outdoor dining areas and on-street parking bays directly outside of their businesses, or the neighbouring business with permission. This has provided hospitality businesses with a huge opportunity to expand their business, in particular for restaurants and bars.

Live music venues are facing increasing rents, cost of living pressures, and are finding it

difficult to obtain public liability insurance, with those able to secure insurance facing significant rises to their existing premiums –as high as 800%. Small to medium live music venues, which make up all of Yarra's live music scene, are being impacted to the point that running their businesses may no longer be viable, with one venue closing its doors after 14 years. At its [12 March 2024 Council Meeting](#), Council resolved to work collaboratively with Music Victoria and the Australian Live Music Business Council to find solutions to the issue of insurance and its impact on the live music industry.

For the year ahead, Yarra City Council's [budget for 2024/25](#) has committed to the commencement of the preparation of a Nighttime Economy Strategy in partnership with surrounding Councils.

YARRA'S NTE PERFORMANCE

Yarra's Core NTE demonstrated strong resilience between 2022 and 2023. Core NTE Sales turnover increased 11% to \$1.3 billion, while employment levels experienced a small upswing (+4%) to 9,675 workers. The number of establishments in the Core NTE, however dropped 6% to 1,559.

In 2022/23, the Core NTE accounted for 9% of all establishments, 11% of employment, and 4% of sales turnover in the city of Yarra – all above the national average and highlighting the sectors importance to the city's economic vitality.

Core NTE overview




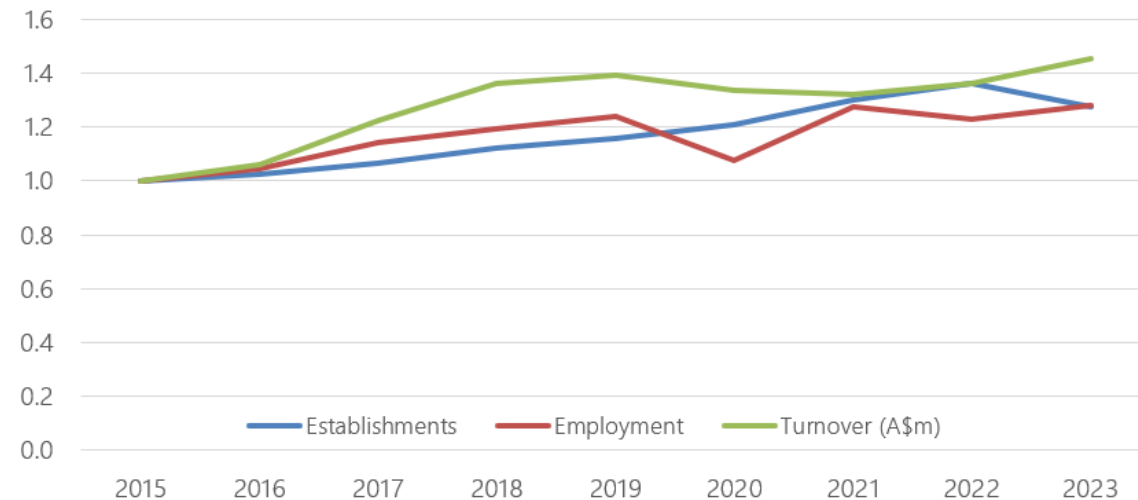
Measure	# Core NTE FY23 % Change FY22-23	% Total Economy
 Establishments	1,559 -6%	9%
 Employment	9,675 +4%	11%
 Sales Turnover	\$1,300m +11%	4%

Figure 73: Indexed trend in Core NTE (2009 = 1.0) across key metrics (inflation adjusted)



SUB-SECTORAL PERFORMANCE

During the 2022/23 financial year, Yarra's **Food** sub-sector experienced a decrease (-7%) in the number of establishments, falling to 711 and a slight increase (+1%) in the number of employees (5,540). Food sales turnover increased (to \$647m / +14%). This was led by strong growth in *Cafes & Restaurants* sales turnover (+\$80m in 2023 and an average growth of 6% per annum since 2015).




Yarra has a particularly strong **Leisure & Entertainment** sub-sector, comprising 41% of its Core NTE establishments (compared to 32% nationally), driven by a strength in *Creative and Performing Arts Activities*. There was mixed performance for this sub-sector in 2022/23. Establishment numbers dropped 7% to 643, while employment surged 13% to 2,270 workers. Total sales turnover also saw strong growth in 2023 (+7%) to reach \$377m – driven by increased sales turnover by *Creative & Performing Arts* activities (+\$18m).

Establishment numbers in the **Drink** sub-sector marginally declined in 2023, with a 1% decrease to 205. Employment levels, however increased 5% to 1,865 workers, while strong demand for *Pubs, Taverns & Bars* saw sales turnover generated in the sub-sector increase to \$277 million (+8%).



Yarra's **Retail** sub-sector saw a moderate decrease in establishments in 2023 (-4%) to 798, while employment showed resilience – increasing 6% to 4,875 employees. Sales turnover remained relatively stable at \$1,603 million, with little change between 2022 and 2023, although this represents a decline in real terms when accounting for inflation.

The **Accommodation** sub-sector faced some challenges, with a 12% decrease in establishments (to 57), while employment rose 2% to 675 employees. Despite this, sales turnover, increased 32% to \$119 million.

Core NTE sub-sectors

Sub-sector	# Establishments % Change FY22-23	% Core NTE
 Drink	205 -1%	13%
 Entertainment	643 -7%	41%
 Food	711 -7%	46%

Retail & Accommodation (Non-Core NTE)

Measure	# Establishments FY2023	% Change 22-23
 Retail	798	-4%
 Accommodation	57	-12%

YARRA'S TRADING PATTERNS

The City of Yarra has a similar number of Core NTE businesses trading in the Evening (6-9pm) to many of the other cities in this report. It does, however, have a much higher proportion trading into the Early Night (9pm-midnight), and Late Night (3-6am) – particularly on Friday and Saturday nights.

This strength in trading activity does not translate to a high proportion of Retail, and Hair & Beauty Services operating at night. Despite this, it is Hair & Beauty businesses opening in the Evening that particularly drive Thursday being the day of the week when the highest number of businesses operate at night. Like all other cities, Sunday is the night that has the fewest businesses trading.

Figure 74: Number of businesses *open at night* (at some point 6pm and 6am)

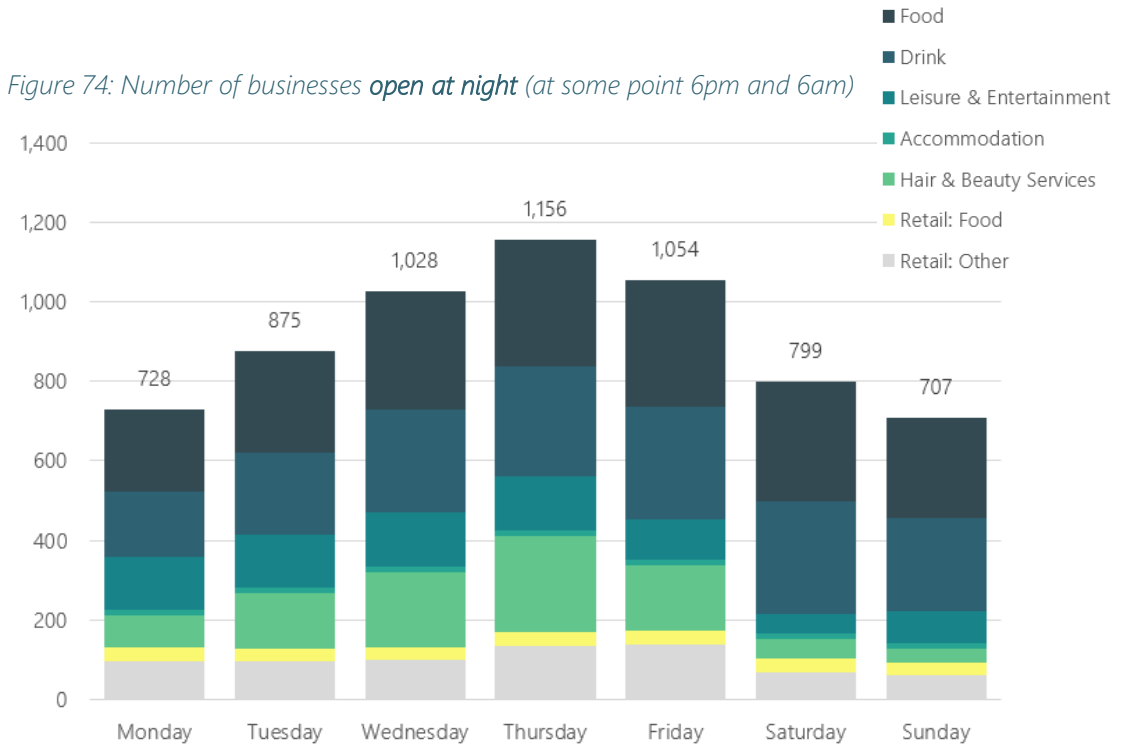


Figure 75: Proportion of all *Core NTE* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	42%	25%	7%	7%
Tuesday	50%	31%	7%	7%
Wednesday	58%	39%	8%	7%
Thursday	61%	42%	10%	8%
Friday	60%	46%	18%	5%
Saturday	54%	45%	18%	5%
Sunday	45%	31%	7%	8%

Figure 76: Proportion of all *Retail* businesses open

Weekday (6pm-6am)	Evening 6pm-9pm	Early-Night 9pm-12am	→ Night rolls into next day →	
			Late-Night 12am-3am	Early-hours 3am-6am
Monday	14%	7%	3%	3%
Tuesday	14%	7%	3%	3%
Wednesday	14%	7%	3%	4%
Thursday	18%	7%	3%	4%
Friday	18%	7%	3%	3%
Saturday	11%	7%	3%	3%
Sunday	9%	6%	3%	3%

Appendix

Economic performance data

The data used in this report was acquired from the Australian Bureau of Statistics (ABS) via bespoke request to their Counts of Australian Businesses, including Entries and Exits (CABEE), June 2018 to June 2023 datasetⁱ. Developed through a collaborative approach with the ABS, the bespoke request covers a selection of key ANZSICs for 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 dataⁱⁱ and industry sales and service incomeⁱⁱⁱ data (sales turnover).

In some cases, ANZSIC level data can be provided; in other cases, the numbers can be small. This can be problematic, because the ABS applies perturbation^{iv} techniques when dealing with smaller numbers to maintain confidentiality of businesses in the dataset, which may lead to large percentage swings when comparing between years.

ⁱ [ABS Counts of Australian Businesses, including Entries and Exits, Jun 2018 to Jun 2023](#)

ⁱⁱ [ABS Labour Force, Australia](#)

Important notes / 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 30th of June each year. Establishments without an ABN or that are not registered for GST are excluded from the dataset.

Most establishments are counted as a single unit, at the location of their registered address, or at the address with the highest employment. Establishments operating from multiple locations (for example large cinema chains) may only be counted once. Conversely, establishments that have registered separate ABNs on account of their legal structures, 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](#) – the ABS terminology for producing business or branch of a larger business.

Each establishment is classified to a single ANZSIC code based on the main source of industry value added (using sales of goods and services, wages

ⁱⁱⁱ [ABS Australian Industry](#)

^{iv} The ABS CABEE explains the use of perturbation in the context of business counts. Additional information on the perturbation

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 the activities carried out at an establishment, particularly where the establishment is counted as a single unit but different activities are undertaken at different locations.

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. Please note also that sales turnover figures in this document reflect the nominal value and do not isolate or identify the impact of inflation into account, unless stated.

ACT caveat on Labour Force Survey data

It should be noted that the ACT Government has raised concerns over the quality of the ABS' 2022 Labour Force Survey due to misalignment between this data and ABS Weekly Payroll data.

technique is available in the Census of Population and Housing dataset ([ABS Catalogue 2011.0.55.001](#))

2022/23 considerations for the CABEE dataset

The Australian Bureau of Statistics has noted that unusual reporting by some businesses during the pandemic and impacts of the ATO-led [Operation Protego](#) led the ABS to conclude several units did not engage in any meaningful economic activity during 2021/22. In the 2022/23 iteration of the CABEE dataset, these changes have decreased the CABEE population by over 30,000 businesses in 2021/22, with a particular impact on Victoria.

Inflation considerations

Typically Measuring the Australian NTE has presented sales turnover figures in a *nominal* fashion. Since the COVID-19 pandemic and associated world events such as the war in Ukraine, costs of living have seen substantial increases across the globe. As a result, the analysis in this report now considers the impact of inflation on sales turnover figures to point to a *real* view of change.

Inflation impacts in this report are calculated using the [ABS Producer Price Indexes](#) Output measures, as this index reflects the actual increases in costs that businesses are facing, rather than what consumers are paying. When inflation adjusted figures are presented, historical sales turnover figures are rebased to 2022/23 prices.

^v This is based on data behind Google Maps (a free service for businesses), rather than paid-for Google Ads.

Trading patterns and clustering

To provide a more detailed view of where businesses are based and the times that establishments are operating, Ingenium Research utilised the Google Maps/Places API^v. This involved developing detailed geographic search criteria across each city to identify relevant night time businesses to understand where they are clustering and then analysing their hours and days of trading. The results of these searches were dynamically geocoded to standard geographic boundaries (LGA, Postcode and SA2, SA1) and then presented as GIS maps and aggregated data tables to comply with Google's terms of reference.

Trading pattern analysis demonstrates the proportion of all businesses in an area or sector that are operating at a specified point in time or day of the week. For the purposes of this report, analysis focused on businesses trading on at least one day of the week during the periods of 6pm-9pm, 9pm-12am, 12am-3am and 3am-6am.

Important notes / limitations of Google Places

Although Google's activity descriptors differ to ANZSICs, they align well. As a result, Google's activity descriptors have, where possible, been mapped to the ANZSIC categories comprising Core NTE and Non-Core NTE used in the

economic performance analysis (refer to Tables 2, to 4 below) to provide a consistent view of activity.

It is also important to note that Google stores multiple activities per establishment (up to twenty) and therefore an establishment could map to multiple NTE sub-sectors based on information provided by the establishment. For example, a pub that offers food might classify itself as a 'pub' primarily, with a secondary activity of 'restaurant'. Like ABS CABEE, this analysis focuses only on the primary activity (e.g. pub) of the establishment.

It should be noted that only businesses with a web presence are captured via the Google Places API and as such, the results of the analysis process **should not be considered a census of business activity**. That being said, comparison with the ABS CABEE dataset suggests that Google establishment counts for the Core NTE and consumer facing Non-Core NTE activities are approximately 90% of CABEE business counts, representing an excellent sample of activity.

The results reflect the opening hours stored in Google at the time of analysis (July 2024) and may or may not be impacted by seasonality changes or other factors (e.g. the pandemic). Similarly, the accuracy of the data relies on business owners updating opening hours within their Google account in a timely and accurate manner.

Using supplementary maps

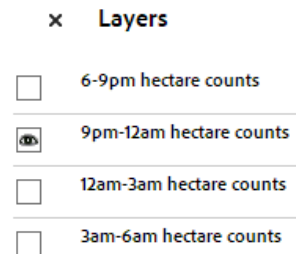
In each city's business clustering section, a link is provided to a supplementary map, which allows further interrogation of business clustering data (as of July 2024) across the hours of the night.

These maps are geospatial PDFs that show counts of Core NTE, Retail, Hair & Beauty Services businesses trading by hectare within each LGA boundary. The default view shows the number of businesses trading between 6pm and 9pm and will be available by opening the file in an internet browser such as Google Chrome.

The maps also provide business counts at three other periods of the night (9pm-12am, 12am-3am and 3am-6am). To view these other time periods and fully utilise the functionality of these geospatial PDFs, it is necessary to download a copy of the file and open it in Adobe Acrobat.

Within Adobe Acrobat, there will be an icon on the left or right hand side of the screen (depending on your version) that lets you access the different map layers available (🗄️ or 🗄️). Once this icon has been clicked, you will be presented with the different layers available. Simply unselect '6-9pm hectare counts' and select another time period of

interest to see business clustering for that time period, e.g.



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 originally developed by TBR Ltd and MAKE Associates, using granular analysis of [Dun & Bradstreet](#) business data in 2008/9. This definition was adapted through the comparison of the United Kingdom's Standard Industrial Classifications (SICs) to Australia's ANZSICs for the [City of Sydney's 2011 Cost Benefit Analysis Study](#). It has been employed in the annual NTE research for CCCLM 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 similar activities (e.g. cultural and leisure). The GLA's analysis aligns well with the NTE ANZSICs shown below in Tables 2, 3 and 4.

Important note / 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 (24-hour) breakdown of economic activity is not recorded in official economic data sources. Therefore, ANZSICs have been selected based on businesses with a propensity to operate at night, but establishment counts may include some businesses that operate solely during, or for part of, the day. As such, employment and sales turnover figures may also include daytime activity.

ANZSIC DEFINITIONS

Table 2: Core NTE ANZSIC definition

NTE Sub-Sector	ANZSIC	Description
Drink	4123 ^{vi}	Liquor Retailing
	4520	Pubs, Taverns & Bars
Leisure & Entertainment	5513 ^{vii}	Motion Picture Exhibition
	900	Creative & Performing Arts Activities
	911 ^{viii}	Sports & Physical Recreation Activities
	912	Horse & Dog Racing Activities
	913	Amusement & Other Recreation Activities
	920 ^{ix}	Gambling Activities
	4530	Clubs (Hospitality)
	9534	Brothel Keeping & Prostitution
Food	4511	Cafes & Restaurants
	4512	Takeaway Food Services

Table 3: Non-Core NTE ANZSIC definition

NTE Sub-Sector	ANZSIC	Description
Care	771	Public Order & Safety Services
	840	Hospitals
Arts Education	8212	Arts Education
Libraries & archives	601	Libraries & Archives
Design	692	Architectural, Engineering & Technical Services
Food	411	Supermarket & Grocery Stores
	4121	Fresh Meat, Fish & Poultry Retailing
	4122	Fruit & Vegetable Retailing

^{vi} 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.

^{vii} 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. For City of Sydney, the Floor and Employment Survey in the original Sydney Cost Benefit Analysis work (2011) allowed further disaggregation of this ANZSIC 551 (Motion Picture and Video Activities) to arrive at Motion Picture Exhibition (ANZSIC 5513), i.e. cinemas, meaning this ANZSIC can still be presented separately for Sydney. For all other LGAs the wider grouping of Motion Picture and Video Activities (ANZSIC 551) is captured as a Supply NTE activity.

^{viii} 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.

^{ix} ANZSIC 920 (Gambling Activities) includes ANZSIC 9209 (Other Gambling Activities), which captures internet gambling operation and TAB operation, that may occur during the day.

NTE Sub-Sector	ANZSIC	Description
	4129	Other Specialised Food Retailing
Accommodation	4400	Accommodation*
Infrastructure	29	Waste Collection, Treatment & Disposal Services
	751	Central Government Administration
	753	Local Government Administration
	772	Regulatory Services
	9531	Laundry & Dry-Cleaning Services
Other Education	8219	Adult, Community & Other Education not elsewhere classified
Promotion	694	Advertising Services
Research	695	Market Research & Statistical Services
Retail/Other	422	Electrical & Electronic Goods Retailing
	425	Clothing, Footwear & Personal Accessory Retailing
	426	Department Stores
	427	Pharmaceutical & Other Store Based Retailing
	4241	Sport & Camping Equipment Retailing
	4242	Entertainment Media Retailing
	4243	Toy & Game Retailing
	4244	Newspaper & Book Retailing
	4245	Marine Equipment Retailing
Sports Education	8211	Sports & Physical Recreation Instruction
Transport	472	Rail Passenger Transport
	482	Water Passenger Transport
	4621	Interurban & Rural Bus Transport
	4622	Urban Bus Transport (including Tramway)
	4623	Taxi & Other Road Transport
	9533	Parking Services

Table 4: Supply NTE ANZSIC definition

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

* This consists of businesses mainly engaged in providing accommodation for visitors, such as hotels, motels and similar units. Please note that this will not include all share accommodation such as Airbnb and Stayz.

Core NTE LGA rankings

Table 5: Core NTE Establishments in 2022/23 – part 1

Position	LGA Name	State	Core NTE Establishments	Per km ²	% Change 22-23
1	Brisbane City Council	QLD	7,506	5.6	1.3%
2	City of Sydney	NSW	5,896	220.8	-0.8%
3	City of Gold Coast	QLD	4,135	3.1	4.0%
4	City of Melbourne	VIC	2,969	79.2	-3.6%
5	Australian Capital Territory	ACT	2,209	0.9	5.2%
6	Inner West Council	NSW	1,844	52.4	0.3%
7	Northern Beaches Council	NSW	1,770	7.0	-0.2%
8	City of Canterbury Bankstown	NSW	1,736	15.8	-5.2%
9	Sunshine Coast Council	QLD	1,709	0.8	-1.0%
10	Yarra City Council	VIC	1,559	79.9	-6.2%
11	Central Coast Council	NSW	1,554	0.9	1.7%
12	City of Parramatta	NSW	1,526	18.2	2.2%
13	Port Phillip City Council	VIC	1,484	72.0	0.8%
14	City of Casey	VIC	1,425	3.5	2.2%
15	City of Blacktown	NSW	1,372	5.7	0.6%
16	City of Monash	VIC	1,349	16.6	-2.2%
17	City of Boroondara	VIC	1,340	22.3	1.4%
18	Wyndham City	VIC	1,315	2.4	-0.8%
19	Moreton Bay Regional Council	QLD	1,309	0.6	2.6%
20	City of Greater Geelong	VIC	1,306	1.0	-1.4%
21	City of Merri-bek	VIC	1,288	25.3	1.5%
22	City of Stonnington	VIC	1,235	48.1	-6.9%
23	City of Darebin	VIC	1,149	21.5	-1.4%
24	Sutherland Shire Council	NSW	1,142	3.4	-1.0%
25	Cumberland Council	NSW	1,109	15.3	-5.1%
26	City of Newcastle	NSW	1,090	5.8	7.0%
27	The Hills Shire Council	NSW	1,088	2.8	4.5%
28	Bayside Council	NSW	1,055	20.8	-0.4%
29	City of Stirling	WA	1,037	9.9	-4.6%
30	Kingston City Council	VIC	1,027	11.2	-2.5%
31	Wollongong City Council	NSW	1,021	1.5	-0.2%
32	Glen Eira City Council	VIC	1,015	26.2	-3.3%
33	City of Whitehorse	VIC	1,011	15.7	-2.5%
34	City of Adelaide	SA	994	63.7	1.1%
35	Hume City Council	VIC	988	2.0	-4.2%
36	City of Greater Dandenong	VIC	934	7.2	-5.8%
37	Mornington Peninsula Shire	VIC	911	1.3	-2.5%
38	City of Whittlesea	VIC	900	1.8	-2.4%
39	Fairfield City Council	NSW	891	8.8	1.3%
40	Randwick City Council	NSW	860	23.7	-2.6%
41	Georges River Council	NSW	856	22.3	-0.6%
42	City of Ryde	NSW	850	21.0	3.7%
43	City of Brimbank	VIC	839	6.8	-3.2%
44	Manningham City Council	VIC	837	7.4	2.3%

Table 6: Core NTE Establishments in 2022/23 – part 2

Position	LGA Name	State	Core NTE Establishments	Per km ²	% Change 22-23
45	Liverpool City Council	NSW	828	2.7	-1.4%
46	Caïms Regional Council	QLD	824	0.5	-3.3%
47	Moonee Valley City Council	VIC	814	18.9	-3.7%
48	Waverley Council	NSW	785	83.5	-1.5%
49	North Sydney Council	NSW	779	74.2	2.2%
50	Bayside City Council	VIC	758	20.4	4.6%
51	Maribymong City Council	VIC	729	23.4	-10.1%
52	Penrith City Council	NSW	714	1.8	0.3%
53	Lake Macquarie City Council	NSW	703	1.1	2.9%
54	City of Perth	WA	672	49.1	3.5%
55	Knox City Council	VIC	672	5.9	-7.4%
56	Willoughby Council	NSW	671	30.0	0.1%
57	Townsville City Council	QLD	662	0.2	-1.0%
58	City of Canada Bay Council	NSW	654	32.9	-2.8%
59	City of Hobart	TAS	638	8.2	-0.9%
60	City of Ballarat	VIC	624	0.8	1.0%
61	Hornsby Shire Council	NSW	621	1.4	-1.0%
62	Melton City Council	VIC	620	1.2	7.6%
63	Banyule City Council	VIC	612	9.8	-5.0%
64	Toowoomba Regional Council	QLD	608	0.0	-1.1%
65	Ku-ring-gai Council	NSW	592	6.9	-2.0%
66	City of Charles Sturt	SA	583	10.6	-1.9%
67	Woollahra Municipal Council	NSW	554	45.0	-3.7%
68	Campbelltown City Council	NSW	552	1.8	4.2%
69	Hobsons Bay City Council	VIC	536	8.3	-0.7%
70	City of Frankston	VIC	533	4.1	-3.6%
71	City of Joondalup	WA	532	5.4	-3.1%
72	City of Greater Bendigo	VIC	509	0.2	6.5%
73	Maroondah City Council	VIC	488	7.9	1.2%
74	Byron Shire	NSW	476	0.8	0.8%
75	City of Darwin	NT	465	4.2	-5.1%
76	Port Macquarie-Hastings Council	NSW	393	0.1	5.6%
77	City of Launceston	TAS	364	0.3	1.1%
78	Hawkesbury City Council	NSW	324	0.1	0.3%
79	Mackay Regional Council	QLD	323	0.0	0.9%
80	Burwood Council	NSW	320	45.1	-5.6%
81	Nillumbik Shire Council	VIC	296	0.7	-8.9%
82	Maitland City Council	NSW	287	0.7	1.4%
83	City of Mitcham	SA	267	3.5	3.9%
84	Albury City Council	NSW	261	0.9	3.6%
85	Port Stephens Council	NSW	261	0.3	-4.4%
86	City of Burnside	SA	252	9.2	-6.0%
87	Queanbeyan-Palerang Regional Council	NSW	226	0.0	-4.2%
88	Bathurst Regional Council	NSW	167	0.0	-3.5%
89	City of Wodonga	VIC	157	0.4	10.6%

Sector breakdown by state / territory

Table 7: Core NTE by state/territory in 2022/23 with change from 2021/22 to 2022/23

State/Territory	Establishments		Employment		Turnover (\$m)	
	Number	% Change 22-23	Number	% Change 22-23	Number	% Change 22-23
New South Wales	44,537	↓ -0.1%	310,975	↑ 6.0%	\$52,095	↑ 16.2%
Victoria	38,882	↓ -1.4%	298,350	↑ 9.6%	\$44,026	↑ 13.3%
Queensland	23,071	↑ 1.3%	223,380	↑ 3.1%	\$34,909	↑ 17.9%
Western Australia	11,486	↑ 0.9%	130,070	↓ -2.9%	\$20,544	↑ 12.7%
South Australia	7,624	↓ -0.1%	76,080	↑ 7.6%	\$11,516	↑ 10.7%
Tasmania	2,558	↑ 2.6%	19,520	↓ -15.7%	\$3,518	↑ 9.2%
Australian Capital Territory	2,209	↑ 5.2%	34,835	↑ 16.0%	\$4,466	↑ 12.1%
Northern Territory	863	↓ -3.1%	19,150	↑ 7.0%	\$2,968	↑ 11.4%
Australia	131,285	↓ -0.1%	1,112,360	↑ 5.1%	\$174,043	↑ 14.7%

Source: Based on Australian Bureau of Statistics CABEE 2018-2023 dataset

Table 8: Food by state/territory in 2022/23 with change from 2021/22 to 2022/23

State/Territory	Establishments		Employment		Turnover (\$m)	
	Number	% Change 22-23	Number	% Change 22-23	Number	% Change 22-23
New South Wales	26,875	↓ -0.9%	181,235	↑ 8.6%	\$26,450	↑ 17.2%
Victoria	24,033	↓ -1.8%	201,185	↑ 5.1%	\$23,806	↑ 14.2%
Queensland	14,156	↑ 1.0%	150,015	↑ 3.7%	\$19,898	↑ 18.3%
Western Australia	7,073	↑ 1.6%	86,340	↓ -4.9%	\$11,931	↑ 13.9%
South Australia	4,590	↓ -1.0%	50,400	↑ 8.8%	\$6,626	↑ 10.8%
Tasmania	1,622	↑ 2.2%	13,680	↓ -15.3%	\$1,979	↑ 10.9%
Australian Capital Territory	1,559	↑ 6.4%	25,750	↑ 20.2%	\$2,835	↑ 13.8%
Northern Territory	529	↓ -6.5%	10,850	↑ 4.0%	\$1,417	↑ 12.4%
Australia	80,455	↓ -0.5%	719,455	↑ 4.5%	\$94,943	↑ 15.5%

Source: Based on Australian Bureau of Statistics CABEE 2018-2023 dataset

Table 9: Drink by state/territory in 2022/23 with change from 2021/22 to 2022/23

State/Territory	Establishments		Employment		Turnover (\$m)	
	Number	% Change 22-23	Number	% Change 22-23	Number	% Change 22-23
New South Wales	3,175	↓ -2.4%	38,780	↑ 6.7%	\$8,646	↑ 11.2%
Victoria	2,774	↑ 0.9%	29,250	↑ 6.7%	\$5,835	↑ 9.3%
Queensland	1,204	↑ 2.6%	21,700	↑ 3.6%	\$3,390	↑ 16.0%
Western Australia	1,010	↑ 1.0%	18,820	↓ -4.1%	\$3,922	↑ 8.9%
South Australia	845	↓ -1.4%	11,735	↑ 7.9%	\$2,132	↑ 5.7%
Tasmania	225	↓ -2.2%	2,500	↓ -14.5%	\$489	↑ 4.6%
Australian Capital Territory	129	↓ -3.0%	2,500	↑ 8.9%	\$403	↑ 2.1%
Northern Territory	55	▬ 0.0%	2,735	↑ 5.2%	\$368	↑ 12.9%
Australia	9,420	↓ -0.4%	128,020	↑ 4.0%	\$25,185	↑ 10.2%

Source: Based on Australian Bureau of Statistics CABEE 2018-2023 dataset

Table 10: Leisure & Entertainment by state/territory in 2022/23 with change from 2021/22 to 2022/23

State/Territory	Establishments		Employment		Turnover (\$m)	
	Number	% Change 22-23	Number	% Change 22-23	Number	% Change 22-23
New South Wales	14,487	↑ 1.9%	90,955	↑ 0.8%	\$16,998	↑ 17.4%
Victoria	12,075	↓ -1.1%	67,915	↑ 27.2%	\$14,385	↑ 13.5%
Queensland	7,711	↑ 1.8%	51,665	↑ 1.5%	\$11,621	↑ 17.7%
Western Australia	3,403	↓ -0.4%	24,910	↑ 6.1%	\$4,691	↑ 13.1%
South Australia	2,189	↑ 2.3%	13,945	↑ 3.5%	\$2,758	↑ 14.6%
Tasmania	711	↑ 5.2%	3,340	↓ -17.9%	\$1,051	↑ 8.4%
Australian Capital Territory	521	↑ 3.8%	6,585	↑ 4.3%	\$1,228	↑ 11.8%
Northern Territory	279	↑ 3.3%	5,565	↑ 14.5%	\$1,183	↑ 9.7%
Australia	41,410	↑ 0.9%	264,880	↑ 7.4%	\$53,915	↑ 15.4%

Source: Based on Australian Bureau of Statistics CABEE 2018-2023 dataset

