



Research Report

The Australian Night Time Economy 2015

Prepared for the National Local Government
Drug and Alcohol Committee

June 2017

Enquiries about this report should be directed to:

Martin Houghton, Director

Email: martin.houghton@OrtusER.co.uk

Andrew Rowell, Director

Email: andrew.rowell@ortusER.co.uk

Document Information

Project Reference Number	PN1705
File Name	PN1705_NLGDAAC_report_v6.docx
Title	The Australian Night Time Economy 2009–2015
Version number	Version 6
Last update	1 st June 2017
Name of Author	Martin Houghton, Andrew Rowell
Name of Reviewer	Martin Houghton
Document Status	Sensitive
Review Status	Final
Approval Status	Approved

Table of Contents

1.	Introduction	2
2.	Australia	4
3.	State level	6
3.1	Australian Capital Territory.....	6
3.2	New South Wales	7
3.3	Northern Territory	8
3.4	Queensland	9
3.5	South Australia.....	10
3.6	Tasmania.....	11
3.7	Victoria	12
3.8	Western Australia.....	13
4.	LGA level	14
4.1	Adelaide.....	14
4.2	Brisbane	16
4.3	Byron.....	18
4.4	Darwin	20
4.5	Frankston.....	22
4.6	Gold Coast.....	24
4.7	Hobart.....	26
4.8	Maroondah.....	28
4.9	Melbourne.....	30
4.10	Newcastle.....	32
4.11	Parramatta.....	34
4.12	Perth.....	36
4.13	Port Phillip.....	38
4.14	Sydney	40
5.	Appendix.....	42
5.1	Glossary.....	42
5.2	Method.....	42
5.3	Definitions.....	43

1. Introduction

This report sets out statistical analysis of the Australian Night Time Economy (NTE) for the period 2009 to 2015. The data are presented at three spatial/administrative levels:

1. National
2. State
3. Local Government Authority (LGA)

This work was commissioned by the Council of Capital City Lord Mayors and is a follow on from prior work undertaken by Ortus Economic Research¹ into the NTE for the years 2009 to 2014.

For statistical and analytical purposes, the NTE comprises three key components:

1. **Core NTE** activities comprise three key sectors: Food, Drink and Entertainment, which include all leisure-based services which are accessed by members of the public (local inhabitants, local employees, tourists and business visitors) predominantly during the evening and night time (6pm to 6am). NTE activities are not restricted to this period, of course, but the definition is designed to capture those business activities in which the majority of sales turnover is generated during these times.
2. **Non-Core NTE** activities include service activities which operate in the evening and night time to a greater or lesser degree. Non-Core NTE activities include predominantly day-time activities such as retail trading (except liquor retailing, which is included in the Core NTE definition) and hotels and guest houses which, while providing overnight accommodation, are more usually on the fringes of leisure activity provision.
3. **Supply NTE** activities include supply chain activities which support the Core and Non-Core NTE.

The core, non-core and supply NTE components are defined via a series of ANZSIC codes. The full lists are provided in the appendix, see Table 24, Table 25 and Table 26. The core NTE is, itself, made up of three sectors:

- Drink
- Entertainment
- Food

The data in this report are drawn from the Australian Bureau of Statistics (ABS), who supplied data for the above-mentioned ANZSIC codes at the required spatial geographies, viz; national, state and LGA. The data were analysed at ANZSIC level, but then aggregated to the key NTE sectors for publication. The decision not to publish ANZSIC data was taken as they are subject to perturbation by rounding, which can cause major fluctuations year on year, especially where the individual codes comprise a small number of establishments or employees². Nonetheless, volatility is still observed in some of the aggregated data.

We also note that changes to licensing legislation and the collection of data mean that caution is advised when comparing data across states and LGAs.

¹ Initiated by TBR and completed by Ortus ER

² See the glossary in section 5.1 for a more detailed explanation of perturbation.

The data are presented for all eight states including the Australian Capital Territory. Fourteen LGAs are investigated including all the capital cities (except Canberra, which is covered by the ACT).

We note that while the analysis is intended to be detailed and consistent, it is based purely on a review of official ABS statistics, so we are not able to provide any further insights regarding the cause of any changes.

2. Australia

NTE establishments represent 17% of all businesses		
Establishments	↑ 11%	From 89,670 in 2009 to 99,350 in 2015
Employment	↑ 21%	From 925,900 in 2009 to 1,17,400 in 2015
Sales turnover	↑ 35%	From AU\$90,170m in 2009 to \$121,720m in 2015

The Night Time Economy (NTE) in Australia accounts for 17% of all establishments (358,080 out of 2,121,053). Collectively, these employ more than 3.1 million people and generate sales turnover of \$660.8bn, making up 26% of Australian employment and contributing 19% of total turnover.

Just over a quarter of NTE establishments (28%, 99,350 establishments) operate in Core NTE activities, including the Food, Drink and Entertainment sectors. Food makes up the majority of the Australian Core NTE in terms of number of establishments (62%), employment (65%) and sales turnover (57%), whilst Entertainment contributes 29%, 24% and 30% respectively. The smallest sector in the Australian Core NTE is Drink which makes up 9% of firms, 12% of employment and generates 14% of sales turnover.

Food is the fastest growing sector within the Australian Core NTE in terms of number of establishments, with a 21% increase between 2009 and 2015. In contrast, the number of establishments in the Entertainment sector has decreased by around 3% since 2009, whilst the Drink sector has remained relatively consistent. Although the Entertainment sector has seen a decline in the number of establishments, the associated employment increased by 19% between 2009 and 2015. Employment in the Drink sector decreased by 6% between 2009 and 2014, though there has been an increase of 4% between 2014 and 2015. Despite the varying growth/decline in the number of establishments and employment across the Core NTE, the sales turnover generated has increased across all three sectors; between 2009 and 2015 there has been an 11% increase in turnover in the Drink sector, 33% in Entertainment and 43% in Food.

Figure 1: Change in Core NTE establishments, employment and sales turnover, Australia, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

Core NTE establishments have risen marginally as a proportion of the total Australian economy, from 4.4% in 2009 to 4.7% in 2015, or 89,670 to 99,350 (Figure 1) in absolute terms. Employment within the Core NTE as a percentage of the total economy has increased from 8.3% in 2009 to 9.3% in 2015. Sales turnover generated within Core NTE activities as a percentage of total turnover remained relatively static between 2009 and 2012, at 3.4% and 3.6% respectively.

Full details are provided in Table I, below.

Table I: Time series data Australia

Australia	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	8,321	8,372	8,332	8,207	8,332	8,443	111	1%
Entertainment	29,960	30,582	30,032	28,893	28,945	28,955	10	0%
Food	51,389	55,562	56,597	56,255	59,492	61,952	2,460	4%
Total	89,670	94,516	94,961	93,355	96,769	99,350	2,581	3%
Employment (employees)								
Drink	136,184	141,199	133,723	131,530	128,214	133,943	5,729	4%
Entertainment	221,227	229,172	229,793	238,056	240,809	263,016	22,207	8%
Food	568,512	618,893	609,209	614,384	637,275	720,453	83,178	12%
Total	925,923	989,264	972,725	983,970	1,006,298	1,117,412	111,114	10%
Sales turnover (\$m)								
Drink	14,966	15,749	15,993	16,242	16,594	16,663	69	0%
Entertainment	27,287	27,671	28,816	27,431	29,100	36,322	7,222	20%
Food	47,917	53,793	55,348	58,543	62,544	68,731	6,187	9%
Total	90,171	97,214	100,157	102,215	108,239	121,716	13,478	11%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S1

3. State level

This section sets out the NTE data for each state.

3.1 Australian Capital Territory

NTE establishments represent 18% of all businesses		
Establishments	↑ 16%	From 1,408 in 2009 to 1,640 in 2015
Employment	↑ 13%	From 24,414 in 2009 to 27,606 in 2015
Sales turnover	↑ 28%	From AU\$2,370m in 2009 to \$3,030m in 2015

The data indicate that the NTE in the Australian Capital Territory has grown significantly over the period 2009 to 2015. However, the pattern is different across the various metrics and there have been below national levels of increase in employment (13% compared to 21%) and sales turnover (28% compared to 35%). Nonetheless, the NTE within the Australian Capital Territory at 18%, represents the second highest proportion for all states, after Tasmania (19%).

Drink has shown a varied performance with the number of establishments down, but employment and sales turnover up. This suggests consolidation with businesses increasing in size. Entertainment demonstrated a similar, but more muted profile. Conversely Food establishments increased by over a quarter, sales were up but employment down.

Food remains the largest core NTE sector across all three metrics.

Table 2: Time series data Australian Capital Territory

Australian Capital Territory	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	109	109	102	101	106	106	0	0%
Entertainment	427	422	415	407	415	415	0	0%
Food	872	957	965	962	1,059	1,119	60	5%
Total	1,408	1,488	1,482	1,470	1,580	1,640	0	0%
Employment (employees)								
Drink	1,939	2,115	1,862	1,685	1,819	2,251	432	19%
Entertainment	5,556	5,745	5,355	5,499	5,877	6,283	406	6%
Food	16,919	18,010	19,892	19,427	18,018	19,072	1,054	6%
Total	24,414	25,870	27,109	26,611	25,714	27,606	1,892	7%
Sales turnover (\$m)								
Drink	250	264	294	166	294	413	118	29%
Entertainment	694	699	609	594	680	797	118	15%
Food	1,426	1,565	1,807	1,820	1,768	1,820	51	3%
Total	2,370	2,528	2,710	2,580	2,742	3,030	288	9%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S16

3.2 New South Wales

NTE establishments represent 17% of all businesses		
Establishments	↑ 9%	From 31,342 in 2009 to 34,102 in 2015
Employment	↑ 16%	From 294,745 in 2009 to 342,132 in 2015
Sales turnover	↑ 30%	From AU\$28,799m in 2009 to \$37,351m in 2015

The New South Wales NTE economy has marginally underperformed against the national picture: establishments (up 9% compared to 11%); employment (up 16% compared to 21%); and sales turnover (up 30% compared to 35%). Of the core sectors; Drink has grown least with the number of establishments rising 4%, employment shrinking by 3% and sales turnover up 15%. The number of Entertainment establishments shrunk by 4%, but employment and sales turnover grew by double figures. Food activity increased across all three metrics.

Table 3: Time series data New South Wales

New South Wales	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	2,717	2,777	2,786	2,735	2,818	2,817	-1	0%
Entertainment	10,981	11,157	10,960	10,472	10,501	10,522	21	0%
Food	17,644	18,987	19,352	18,907	20,082	20,763	681	3%
Total	31,342	32,921	33,098	32,114	33,401	34,102	701	2%
Employment (employees)								
Drink	44,124	44,891	40,942	41,151	40,658	42,890	2,232	5%
Entertainment	80,683	79,708	83,083	84,220	85,453	88,934	3,481	4%
Food	169,938	185,044	175,818	178,971	185,517	210,308	24,791	12%
Total	294,745	309,643	299,843	304,342	311,628	342,132	30,504	9%
Sales turnover (\$m)								
Drink	4,925	5,007	4,971	5,135	5,525	5,657	132	2%
Entertainment	9,551	9,246	9,895	9,459	10,024	11,630	1,606	14%
Food	14,323	16,084	15,973	16,532	18,208	20,064	1,856	9%
Total	28,799	30,337	30,839	31,126	33,757	37,351	3,594	10%

Source: OrtusER/Australian Bureau of Statistics, 2017, WI/S3

3.3 Northern Territory

NTE establishments represent 17% of all businesses		
Establishments	↑ 4%	From 654 in 2009 to 679 in 2015
Employment	↑ 58%	From 11,997 in 2009 to 18,950 in 2015
Sales turnover	↑ 84%	From AU\$1,158m in 2009 to \$2,129m in 2015

The data for Northern Territory have demonstrated major change, which in part appears to be the consequence of relatively small numbers and the impact of perturbation (see the glossary in section 5.1 for an explanation of perturbation). In addition to large changes to the number of employees and sales turnover between 2009 and 2015, there has been significant volatility year on year over the period. This may reflect some inconsistencies in the way new businesses are registered, eg as Food rather than Drink establishments, where a bar may serve food as well as liquor.

Table 4: Time series data Northern Territory

Northern Territory	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	54	55	62	57	56	60	4	7%
Entertainment	235	239	221	229	221	204	-17	-8%
Food	365	397	394	389	406	415	9	2%
Total	654	691	677	675	683	679	-4	-1%
Employment (employees)								
Drink	1,959	2,053	3,206	3,270	5,283	3,908	-1,375	-35%
Entertainment	3,320	4,026	2,288	2,282	2,942	5,255	2,313	44%
Food	6,718	7,206	8,829	8,516	7,907	9,787	1,880	19%
Total	11,997	13,285	14,323	14,068	16,132	18,950	2,818	15%
Sales turnover (\$m)								
Drink	215	221	385	427	599	453	-145	-32%
Entertainment	377	475	268	216	354	742	388	52%
Food	566	626	802	851	776	934	158	17%
Total	1,158	1,322	1,455	1,494	1,729	2,129	401	19%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S4

3.4 Queensland

NTE establishments represent 16% of all businesses		
Establishments	↑ 9%	From 16,321 in 2009 to 17,814 in 2015
Employment	↑ 28%	From 18,373 in 2009 to 239,273 in 2015
Sales turnover	↑ 46%	From AU\$17,840m in 2009 to \$26,043m in 2015

The NTE in Queensland represents a marginally smaller proportion of the economy than the rest of Australia (16% compared to 17%). Nonetheless, the core NTE in Queensland has grown rapidly over the period 2009 to 2015, with employment (28% compared to 21%) and sales turnover (46% compared to 35%) rising significantly faster than nationally. With the number of establishments growing significantly more slowly (9%), this suggests that NTE businesses have grown larger.

Entertainment and Food have grown employment and sales strongly. While still growing, the drink sector grew more slowly than the others. Both Drink and Entertainment saw falls in the number of establishments.

Table 5: Time series data Queensland

Queensland	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	1,217	1,183	1,153	1,138	1,127	1,147	20	2%
Entertainment	5,735	5,782	5,669	5,414	5,382	5,339	-43	-1%
Food	9,369	10,070	10,104	10,150	10,778	11,328	550	5%
Total	16,321	17,035	16,926	16,702	17,287	17,814	527	3%
Employment (employees)								
Drink	21,113	22,633	24,973	23,628	22,916	23,939	1,023	4%
Entertainment	44,296	45,143	53,683	58,026	56,467	62,120	5,653	9%
Food	121,964	132,457	127,930	129,484	136,872	153,214	16,342	11%
Total	187,373	200,233	206,586	211,138	216,255	239,273	23,018	10%
Sales turnover (\$m)								
Drink	2,081	2,274	2,742	2,692	2,741	2,803	61	2%
Entertainment	5,479	5,462	6,882	6,805	6,857	8,624	1,767	20%
Food	10,280	11,513	11,623	12,577	13,433	14,617	1,184	8%
Total	17,840	19,249	21,247	22,074	23,032	26,043	3,012	12%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S2

3.5 South Australia

NTE establishments represent 16% of all businesses		
Establishments	↑ 7%	From 5,699 in 2009 to 6,084 in 2015
Employment	↑ 14%	From 70,421 in 2009 to 79,984 in 2015
Sales turnover	↑ 25%	From AU\$6,817m in 2009 to \$8,542m in 2015

South Australia's core NTE showed relatively modest growth across the three core segments over the five years to 2015, when compared to the country as a whole. Entertainment fared least well, shedding both establishments and employment. Conversely, Food performed well, gaining establishments, employment and turnover. While the increase in establishments was marginally below the national figure, employment and turnover were ahead, suggesting significant growth in the existing businesses. Drink lost ground against the country data in terms of employment and sales turnover, but matched the 1% increase in establishments.

Table 6: Time series data South Australia

South Australia	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	799	779	783	780	792	806	14	2%
Entertainment	1,766	1,774	1,702	1,614	1,578	1,570	-8	-1%
Food	3,134	3,303	3,420	3,419	3,572	3,708	136	4%
Total Core NTE	5,699	5,856	5,905	5,813	5,942	6,084	142	2%
Employment (employees)								
Drink	16,077	17,148	14,880	13,260	12,232	14,191	1,959	14%
Entertainment	14,791	14,407	11,598	12,238	13,257	14,350	1,093	8%
Food	39,553	41,302	41,968	41,432	46,126	51,444	5,318	10%
Total Core NTE	70,421	72,857	68,446	66,930	71,615	79,985	8,370	10%
Sales turnover (\$m)								
Drink	1,604	1,736	1,548	1,518	1,412	1,583	171	11%
Entertainment	1,879	1,773	1,487	1,307	1,601	2,051	450	22%
Food	3,334	3,590	3,813	3,915	4,527	4,908	381	8%
Total Core NTE	6,817	7,099	6,848	6,740	7,540	8,542	1,002	12%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S1

3.6 Tasmania

NTE establishments represent 19% of all businesses		
Establishments	↑ 1%	From 1,832 in 2009 to 1,854 in 2015
Employment	↑ 18%	From 21,388 in 2009 to 25,172 in 2015
Sales turnover	↑ 37%	From AU\$2,019m in 2009 to \$2,768m in 2015

With NTE businesses representing 19% of all establishments, the NTE is more important to Tasmania's economy than it is for any other state. This is unsurprising given the increasing role that tourism plays. However, growth in terms of establishments and employment, were below the national benchmark and turnover only marginally above. As for the core NTE sectors: Drink shrunk across all metrics; Entertainment appeared to consolidate with the number of establishments declining but employment and turnover increasing very rapidly and; Food also being mixed showing overall growth but well below national numbers.

Table 7: Time series data Tasmania

Tasmania	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	227	246	250	235	215	224	9	4%
Entertainment	562	596	561	539	515	523	8	2%
Food	1,043	1,062	1,095	1,069	1,085	1,107	22	2%
Total	1,832	1,904	1,906	1,843	1,815	1,854	39	2%
Employment (employees)								
Drink	4,312	4,259	4,926	4,886	3,586	3,790	204	5%
Entertainment	3,977	5,584	5,121	5,282	3,417	7,018	3,601	51%
Food	13,099	12,164	12,013	12,720	11,628	14,364	2,736	19%
Total	21,388	22,007	22,060	22,888	18,631	25,172	6,541	26%
Sales turnover (\$m)								
Drink	415	402	533	529	433	403	-30	-7%
Entertainment	500	688	667	623	406	994	588	59%
Food	1,104	1,057	1,091	1,085	1,141	1,370	229	17%
Total	2,019	2,147	2,291	2,237	1,980	2,768	788	28%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S8

3.7 Victoria

NTE establishments represent 17% of all businesses		
Establishments	↑ 14%	From 24,359 in 2009 to 27,802 in 2015
Employment	↑ 20%	From 220,979 in 2009 to 266,246 in 2015
Sales turnover	↑ 33%	From AU\$21,958m in 2009 to \$29,253m in 2015

Second largest of the states in terms of NTE after New South Wales, Victoria saw similar growth rates to the country as a whole. Establishments were up (14% compared to 11%), employment (20% compared to 21%) and sales turnover (33% compared to 35%).

Notably, Drink plays an increasingly smaller role within the NTE than it used to. While the number of Drink establishments grew by some 2%, employment (-11%) and sales turnover (-4%) were both down.

As in other states, there was a degree of volatility between 2009 and 2012, after which there was steady growth.

Table 8: Time series data Victoria

Victoria	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	2,286	2,284	2,262	2,229	2,284	2,327	43	2%
Entertainment	7,746	7,999	7,854	7,659	7,750	7,825	75	1%
Food	14,327	15,807	16,173	16,236	17,013	17,650	637	4%
Total	24,359	26,090	26,289	26,124	27,047	27,802	755	3%
Employment (employees)								
Drink	30,484	30,747	26,248	25,407	27,086	27,137	51	0%
Entertainment	53,731	56,852	49,775	51,762	54,304	60,738	6,434	11%
Food	136,764	153,164	150,465	151,712	158,223	178,371	20,148	11%
Total	220,979	240,763	226,488	228,881	239,613	266,246	26,633	10%
Sales turnover (\$m)								
Drink	3,503	3,597	3,395	3,366	3,706	3,379	-327	-10%
Entertainment	6,927	7,139	6,532	6,081	6,795	8,857	2,062	23%
Food	11,527	13,313	13,670	14,660	15,529	17,017	1,488	9%
Total	21,958	24,048	23,597	24,107	26,029	29,253	3,224	11%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S10

3.8 Western Australia

NTE establishments represent 16% of all businesses		
Establishments	↑ 17%	From 7,967 in 2009 to 9,286 in 2015
Employment	↑ 26%	From 94,604 in 2009 to 118,770 in 2015
Sales turnover	↑ 37%	From AU\$9,211m in 2009 to \$12,664m in 2015

Western Australia's NTE grew strongly over the period 2009 to 2015, with all three metrics showing above national growth rates. The increase in establishments was particularly strong, with all core sectors showing net increases in business numbers.

Table 9: Time series data Western Australia

Western Australia	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	912	933	928	927	929	951	22	2%
Entertainment	2,420	2,524	2,498	2,411	2,437	2,473	36	1%
Food	4,635	4,979	5,094	5,123	5,497	5,862	365	6%
Total	7,967	8,436	8,520	8,461	8,863	9,286	423	5%
Employment (employees)								
Drink	16,176	17,352	16,686	18,244	14,635	16,624	1,989	12%
Entertainment	14,871	17,708	18,891	18,747	19,092	18,296	-796	-4%
Food	63,557	69,546	72,293	72,124	72,983	83,850	10,867	13%
Total	94,604	104,606	107,870	109,115	106,710	118,770	12,060	10%
Sales turnover (\$m)								
Drink	1,973	2,248	2,125	2,410	1,883	2,041	158	8%
Entertainment	1,881	2,191	2,477	2,345	2,384	2,624	239	9%
Food	5,357	6,045	6,568	7,102	7,163	7,999	837	10%
Total	9,211	10,484	11,170	11,856	11,430	12,664	1,234	10%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S13

4. LGA level

It should be noted that data are not available for all years for Byron, Frankston and Gold Coast.

4.1 Adelaide

Food represents 68% of all core NTE establishments		
Establishments	↑ 3%	From 745 in 2009 to 765 in 2015
Employment	↑ 6%	From 10,379 in 2009 to 11,015 in 2015
Sales turnover	↑ 17%	From \$949m in 2009 to \$1,115m in 2015

Core NTE establishments increased by 17% over the period 2009 to 2015, which compares to a state level figure of a 25% increase. Core NTE establishments increased by 4% over the year 2014/2015, which compares to state level figure of a 13% increase. Adelaide's NTE appears to have performed less strongly than that for South Australia. Employment grew faster than the other metrics.

The Core NTE includes 766 establishments (38% of total NTE), employing 11,014 people (40% of total NTE) and a sales turnover of \$1.1bn (21% of total NTE). The number of Core NTE establishments has been relatively consistent between 2009 and 2015 (see 68% of Core NTE establishments operate in the Food sector (521 establishments). Collectively, these employ 64% of Core NTE employees (7,099 people) and generate 60% of sales turnover (\$672m). The number of Food establishments did not change significantly between 2014 and 2015, but there was a 10% increase in sales turnover (\$543m to \$672m) and a 13% increase in employees (6,269 to 7,099). The contributions of the Drink and Entertainment sectors to the Core NTE are relatively similar in terms of establishment numbers (17% of Core NTE establishments operate in the Drink sector and 15% in Entertainment) and turnover (19% of Core NTE turnover is from Drink and 21% from Entertainment).

Figure 2), though the proportion of the total Adelaide economy which comprises Core NTE establishments has seen a slow decline from 14.8% in 2009 to 13.0% in 2015. Similarly, Core NTE sales turnover has risen over the time period (from \$949m in 2009 to \$1.1bn in 2015, 17%), but as a percentage of total economy sales turnover there has been a decrease from 24.8% in 2009 to 22.2% in 2015. There was a 2% decrease in Core NTE employment between 2009 and 2011, though since 2011 employment has increased from 10,145 to 11,014 (9%). See Table 10, below.

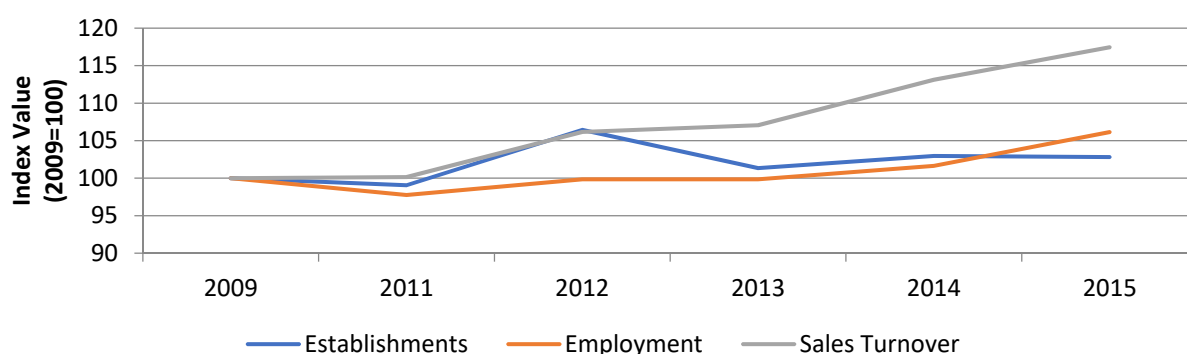
Table 10: Core NTE Adelaide

Adelaide	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	118	109	112	110	133	130	-3	-2%
Entertainment	122	118	121	112	114	114	0	0%
Food	505	511	560	533	520	521	1	0%
Total	745	738	793	755	767	765	-2	0%
Employment (employees)								
Drink	2,337	2,223	1,899	2,125	2,356	2,255	-101	-4%
Entertainment	1,598	1,733	2,040	1,709	1,923	1,661	-262	-16%
Food	6,444	6,189	6,422	6,528	6,269	7,099	830	12%
Total	10,379	10,145	10,361	10,362	10,548	11,015	467	4%
Sales turnover (\$m)								
Drink	214	209	173	196	230	214	-16	-7%
Entertainment	192	203	251	216	233	229	-4	-2%
Food	543	538	584	603	611	672	62	9%
Total	949	950	1,008	1,016	1,073	1,115	41	4%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

68% of Core NTE establishments operate in the Food sector (521 establishments). Collectively, these employ 64% of Core NTE employees (7,099 people) and generate 60% of sales turnover (\$672m). The number of Food establishments did not change significantly between 2014 and 2015, but there was a 10% increase in sales turnover (\$543m to \$672m) and a 13% increase in employees (6,269 to 7,099). The contributions of the Drink and Entertainment sectors to the Core NTE are relatively similar in terms of establishment numbers (17% of Core NTE establishments operate in the Drink sector and 15% in Entertainment) and turnover (19% of Core NTE turnover is from Drink and 21% from Entertainment).

Figure 2: Change in Core NTE establishments, employment and sales turnover, Adelaide, 2009–2015



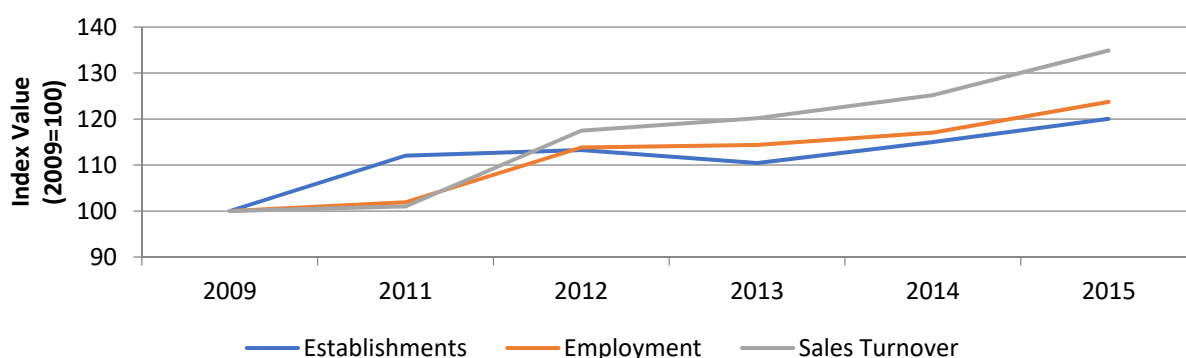
Source: OrtusER/Australian Bureau of Statistics, 2017

4.2 Brisbane

Food represents 67% of all core NTE establishments		
Establishments	↑ 20%	From 4,639 in 2009 to 5,569 in 2015
Employment	↑ 24%	From 51,223 in 2009 to 63,369 in 2015
Sales turnover	↑ 35%	From \$4,978m in 2009 to \$6,715m in 2015

One fifth of Brisbane establishments operate in the NTE and 27% of these are classified as Core NTE. The Core NTE employs 63,369 people (33% of NTE employment) although this only generates 18% of NTE sales turnover.

Figure 3: Change in Core NTE establishments, employment and sales turnover, Brisbane, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

Food is the largest Core NTE sector in terms of establishments (67%), employment (67%) and sales turnover (60%). The number of establishments, employment and sales turnover have all increased steadily since 2009. Sales turnover has risen by almost 50% (from \$2.726bn in 2009 to \$4.022bn in 2015).

The Drink sector is very small as a proportion of the Core NTE, contributing only 5% of establishments, 7% employment and 6% sales turnover. There has been a steady decrease in the number of Drink sector establishments and employment since 2011 and there was an 8% decrease in sales turnover between 2014 and 2015.

Despite a relatively constant number of establishments in the Entertainment sector between 2009 and 2015 (there was a 2% decrease during this time period), employment and sales turnover have seen an increase of 16% and 25% respectively.

Table 11: Core NTE Brisbane

Brisbane	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	262	280	271	268	262	259	111	1%
Entertainment	1,597	1,703	1,676	1,562	1,582	1,572	10	0%
Food	2,780	3,214	3,307	3,294	3,490	3,738	2460	4%
Total	4,639	5,197	5,254	5,124	5,334	5,569	2,581	3%
Employment (employees)								
Drink	4,580	4,478	4,474	4,890	4,554	4,297	-257	-6%
Entertainment	14,296	12,286	16,961	16,594	16,413	16,603	190	1%
Food	32,347	35,437	36,865	37,097	38,991	42,469	3,478	8%
Total	51,223	52,201	58,300	58,581	59,958	63,369	3,411	5%
Sales turnover (\$m)								
Drink	417	423	407	452	444	407	-37	-9%
Entertainment	1,834	1,526	2,091	2,101	1,988	2,285	297	13%
Food	2,726	3,080	3,349	3,428	3,799	4,022	223	6%
Total	4,978	5,029	5,847	5,982	6,231	6,715	483	7%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

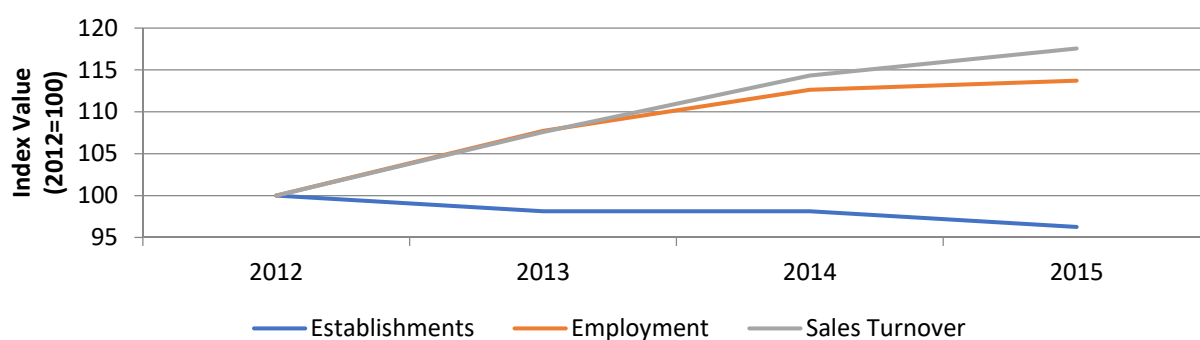
4.3 Byron

Food represents 61% of all core NTE establishments		
Establishments	↓ 4%	From 325 in 2011 to 309 in 2015
Employment	↑ 14%	From 3,548 in 2012 to 4,035 in 2015
Sales turnover	↑ 18%	From \$361m in 2011 to \$428m in 2015

Full data on the NTE in Byron have only been available since 2012.

The Core NTE accounts for 27% of all NTE establishments in Byron, almost half (48%) of its employees and 26% of sales turnover. Despite a 5% decrease in the number of Core NTE establishments between 2011 and 2015 (from 325 to 309), the same period saw a 14% increase in Core NTE employment (from 3,548 to 4,035) and an 18% increase in sales turnover (from \$361m to \$428m) (see Figure 4).

Figure 4: Change in Core NTE establishments, employment and sales turnover, Byron, 2012–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

Whilst Core NTE sales turnover has increased every year since 2011, sales turnover is steadily declining as a percentage of the total economy (from 33.9% in 2011 to 24.7% in 2015).

Food is the main contributor to the Core NTE, comprising 61% of establishments, 66% of employment and 59% of sales turnover. The number of Food establishments, employees and sales turnover have all increased year on year since 2011. Only 3% of Core NTE establishments operate in the Drink sector; this number has been declining since 2011, but a decrease of 31% was seen between 2014 and 2015. This change can be attributed to a large decrease in the number of liquor retailers (60%). Entertainment contributes a third of Core NTE sales turnover, 36% of Core NTE establishments and 26% of Core NTE employment. All three have decreased since 2009, though between 2014 and 2015 there was an 8% increase in sales turnover in the sector.

Table 12: Core NTE Byron

Byron	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	*	19	16	14	13	9	-4	-44%
Entertainment	*	130	128	124	124	111	-13	-12%
Food	*	176	177	177	178	189	11	6%
Total	*	325	321	315	315	309	-6	-2%
Employment (employees)								
Drink	*	*	299	394	354	308	-46	-15%
Entertainment	*	*	1,274	1,113	1,114	1,059	-55	-5%
Food	*	*	1,975	2,316	2,529	2,668	139	5%
Total	*	*	3,548	3,823	3,997	4,035	38	1%
Sales turnover (\$m)								
Drink	*	28	27	36	35	29	-5	-18%
Entertainment	*	161	157	141	135	146	11	7%
Food	*	172	179	214	246	253	6	2%
Total	*	361	364	391	416	428	12	3%

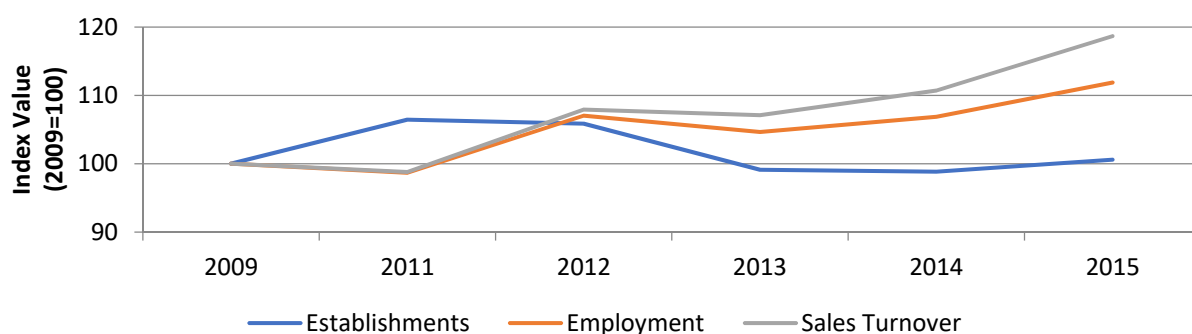
Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

4.4 Darwin

Food represents 67% of all core NTE establishments		
Establishments	↑ 1%	From 341 in 2009 to 344 in 2015
Employment	↑ 12%	From 4,550 in 2009 to 5,091 in 2015
Sales turnover	↑ 19%	From \$463m in 2009 to \$549m in 2015

Almost two thirds of NTE establishments (31%, 343 establishments) operate in Core NTE activities. The Core NTE accounts for 38% of employment (5,091 people) and 23% of sales turnover (\$549m). Whilst there has been a year on year growth in employment (12% between 2009 and 2015) and sales turnover (19% between 2009 and 2015) (see Figure 5), as a percentage of total economy these figures are declining over time.

Figure 5: Change in Core NTE establishments, employment and sales turnover, Darwin, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

The smallest sector in the Core NTE is Drink. The number of Drink establishments has been decreasing year on year from 21 establishments in 2009 to 15 in 2015. Employment in the Drink sector, and to a lesser extent sales turnover, have increased since 2009 (a 38% increase in employment between 2009 and 2015, and an 8% increase in sales turnover). However, both experienced a substantial decline between 2014 and 2015 (17% in employment and 20% in sales turnover), largely attributed to a decline in liquor retailers.

Food accounts for the majority of Core NTE establishments (67%), employment (61%) and sales turnover (54%). All three have grown between 2009 and 2015 with the number of establishments increasing by 16% (from 197 in 2009 to 229 in 2015), employment by 33% (from 2,329 in 2009 to 3,101 in 2015) and sales turnover by 50% (from \$196.3m in 2009 to \$293.7m in 2015). In contrast, the Entertainment sector has declined by 19% in terms of the number of establishments (from 123 in 2009 to 100 in 2015) and by 18% in terms of employment (from 1906 in 2009 to 1556 in 2015). Sales turnover generated by Entertainment activities had decreased from \$229m in 2009 to \$195m in 2014, though a 26% increase in sales turnover in Creative and Performing Arts Activities resulted in an overall 10% increase for this sector between

2014 and 2015.

Table 13: Core NTE Darwin

Darwin	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	21	23	23	19	18	15	-3	-20%
Entertainment	123	126	118	105	101	100	-1	-1%
Food	197	214	220	214	219	229	10	4%
Total	341	363	361	338	338	344	6	2%
Employment (employees)								
Drink	315	320	512	518	525	433	-92	-21%
Entertainment	1,906	1,829	1,754	1,623	1,611	1,556	-55	-4%
Food	2,329	2,341	2,604	2,620	2,728	3,101	373	12%
Total	4,550	4,490	4,870	4,761	4,864	5,091	227	4%
Sales turnover (\$m)								
Drink	38	39	47	48	51	41	-10	-25%
Entertainment	229	214	216	206	195	214	19	9%
Food	196	204	237	242	266	294	28	10%
Total	463	457	499	496	512	549	37	7%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

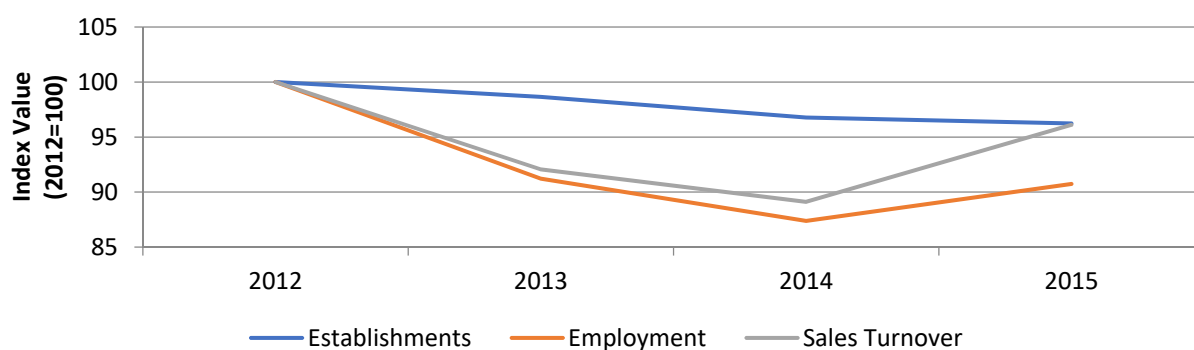
4.5 Frankston

Food represents 62% of all core NTE establishments		
Establishments	↓ %I	From 361 in 2011 to 358 in 2015
Employment	↓ 9%	From 3,303 in 2012 to 2,997 in 2015
Sales turnover	↔ 0%	From \$331m in 2011 to \$331m in 2015

Full data on the NTE in Frankston have only been available since 2012.

The Core NTE accounts for 26% of establishments, 32% employment and 18% sales turnover in Frankston. All three declined between 2012 and 2014 (3% in terms of the number of establishments, 13% in employment and 11% in sales turnover), although an increase was seen between 2014 and 2015 for employment (4%) and sales turnover (8%) (see Figure 6).

Figure 6: Change in Core NTE establishments, employment and sales turnover, Frankston, 2012–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

The number of establishments, by area and turnover by area, are relatively consistent over the 2009–2015 period, however, there has been a decline in employment density by area from 102.3 employees/km² in 2009 to 72.5 employees/ km² in 2015.

Food is the largest Core NTE sector in terms of the number of establishments (222 establishments, 62%), employment (1,732 people, 58%) and sales turnover (\$164m, 50%). There was relatively little change in this sector between 2014 and 2015.

Entertainment accounts for 34% of establishments (120 establishments), 36% of employment (1,093 people) and 45% of sales turnover (\$150m). Between 2012 and 2015, there has been a steady decline in all three (10% establishments, 20% employment and 10% sales turnover).

The Drink sector is the smallest in the Core NTE comprising only 4% of establishments, 6% of employment and 5% of sales turnover. Between 2012 and 2015, there has been a decline in all three (6% establishments, 21% employment and 18% sales turnover).

Table 14: Core NTE Frankston

Frankston	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	*	22	17	15	15	16	1	6%
Entertainment	*	128	133	124	118	120	2	2%
Food	*	211	222	228	227	222	-5	-2%
Total	0	361	372	367	360	358	-2	-1%
Employment (employees)								
Drink	*	*	219	249	135	172	37	22%
Entertainment	*	*	1,360	1,124	1,073	1,093	20	2%
Food	*	*	1,724	1,640	1,679	1,732	53	3%
Total	0	0	3,303	3,013	2,887	2,997	110	4%
Sales turnover (\$m)								
Drink	*	23	20	23	13	16	3	20%
Entertainment	*	163	168	142	130	150	20	14%
Food	*	145	157	152	164	164	1	0%
Total	0	331	344	317	307	331	24	7%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

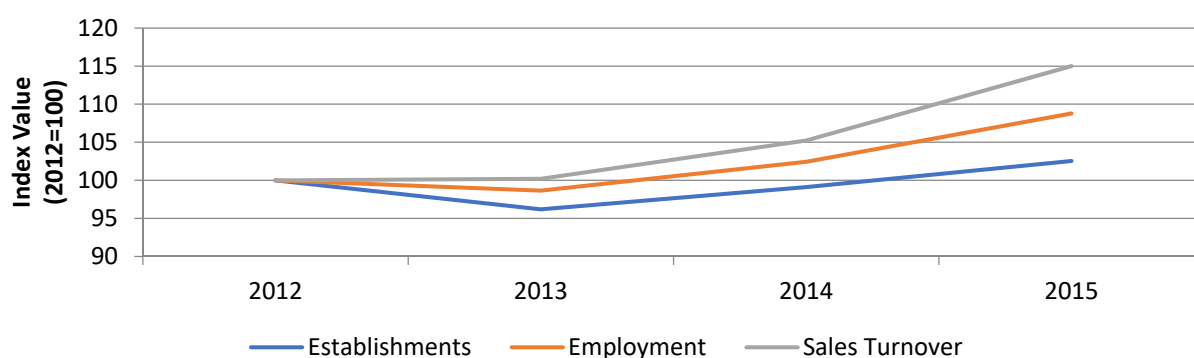
4.6 Gold Coast

Food represents 63% of all core NTE establishments		
Establishments	↑ 11%	From 2,911 in 2011 to 2,959 in 2015
Employment	↑ 9%	From 29,177 in 2012 to 31,736 in 2015
Sales turnover	↑ 20%	From \$2.848bn in 2011 to \$3.428bn in 2015

Full data on the NTE in Gold Coast have only been available since 2012.

There are 2,959 establishments operating in Gold Coast's Core NTE, which form 30% of the total NTE (9,865 establishments). The number of establishments decreased by 5% between 2011 and 2013 but has seen an increase of 7% since 2013 (see Figure 7). Despite this, the number of Core NTE establishments has remained relatively consistent as a percentage of total economy.

Figure 7: Change in Core NTE establishments, employment and sales turnover, Gold Coast, 2012–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

One third of Core NTE establishments operate in the Entertainment sector and this accounts for 31% of Core NTE employment, a figure which increased by 4% between 2014 and 2015. Associated sales turnover in this sector also increased between 2014 and 2015 (by 18%) and accounts for 39% of Core NTE sales turnover. This increase was the first growth seen in this sector's sales turnover since 2012.

The largest sector, Food, has been growing steadily since 2013 in terms of the number of establishments, from 1,700 in 2013 to 1,865 in 2015 (10%). Employment and turnover also increased during the same time period, by 15% and 18% respectively. 63% of Core NTE firms operate in the Food sector. Collectively these employ 19,653 people (62% of Core NTE employment) and generate \$1.9bn (54% of Core NTE sales turnover).

The Drink sector contributes a relatively small amount to the Core NTE, accounting for only 4% of establishments, 7% employment and 6% sales turnover. The number of Drink establishments decreased by 11% between 2011 and 2015, from 150 to 133. There had been an increase of 26% in sales turnover between 2011 and 2014 from \$181m in 2011 to \$228m in 2014, however this decreased to \$214m in 2015 (a fall of 6%).

Table 15: Core NTE Gold Coast

Gold Coast	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	*	150	142	136	133	133	0	0%
Entertainment	*	1,031	987	940	931	961	30	3%
Food	*	1,730	1,757	1,700	1,796	1,865	69	4%
Total	0	2,911	2,886	2,776	2,860	2,959	99	3%
Employment (employees)								
Drink	*	*	2,045	2,129	2,338	2,260	-78	-3%
Entertainment	*	*	10,158	9,533	9,437	9,824	387	4%
Food	*	*	16,974	17,122	18,112	19,653	1,541	8%
Total	0	0	29,177	28,784	29,887	31,736	1,849	6%
Sales turnover (\$)								
Drink	*	181	186	197	228	214	-14	-6%
Entertainment	*	1,184	1,252	1,207	1,143	1,352	209	15%
Food	*	1,484	1,542	1,582	1,765	1,861	97	5%
Total	0	2,848	2,980	2,986	3,136	3,428	292	9%

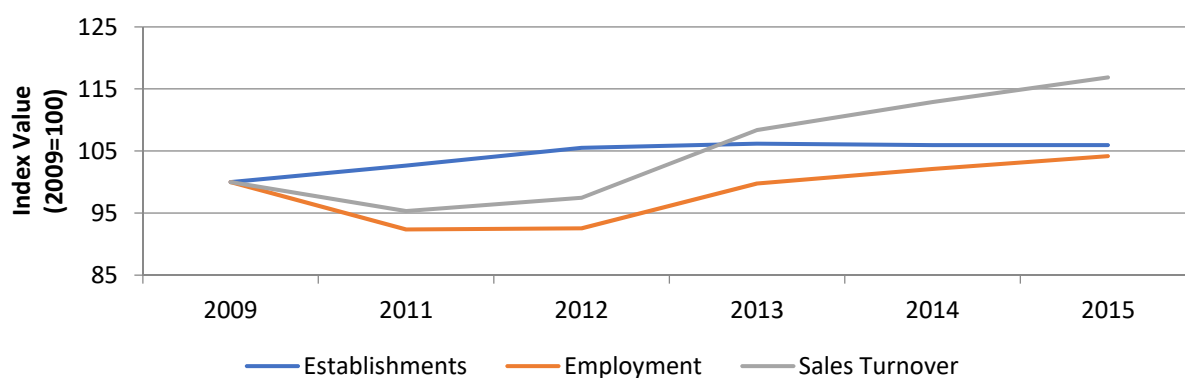
Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

4.7 Hobart

Food represents 63% of all core NTE establishments		
Establishments	↑ %6	From 453 in 2009 to 480 in 2015
Employment	↑ 4%	From 5,897 in 2009 to 6,143 in 2015
Sales turnover	↑ 17%	From \$551m in 2009 to \$644m in 2015

One third of NTE establishments operate in the Core NTE sector (480 establishments), employing 38% of NTE employees (6,143 people) and generating 21% of sales turnover (\$643.7m). The number of Core NTE establishments increased by 6% between 2009 and 2013 (from 453 in 2009 to 481 in 2013) and numbers have remained fairly constant since 2013 (see Figure 8).

Figure 8: Change in Core NTE establishments, employment and sales turnover, Hobart, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

However, as a percentage of the total economy, Core NTE establishments have been declining since 2009. In contrast, the number of employees in the Core NTE has increased since 2012 from 5,457 to 6,143 in 2015 (a 13% increase) and sales turnover has grown from \$537.0m in 2012 to \$643.7m in 2015 (20%). However, both employment and sales turnover as a proportion of the total economy are decreasing, as are employment density and sales turnover density by area.

The Core NTE is dominated by the Food sector, which accounts for 63% of Core NTE establishments (300 establishments), 59% of employment (3,602 people) and 53% of sales turnover (\$341.1m). This is a growing sector with all three parameters increasing since 2009. A quarter of establishments in the Core NTE operate in the Entertainment sector (118 establishments), a figure which has remained fairly constant since 2009. Despite this, employment in Entertainment, which contributes 23% of Core NTE, has grown by 12% (from 1,286 in 2009 to 1,443 in 2015). Entertainment sales turnover has also grown by 29% (from \$154.1m in 2009 to \$198.6m in 2015) during this time. The smallest sector in the Core NTE is Drink, which accounts for only 13% of establishments (62 establishments), 18% of employment (1,098 people) and 16% of sales turnover (\$104.0m). The number of Drink establishments and employment declined between 2009 and 2015 (13% and 10% respectively). Between 2009 and 2012 sales turnover in the Drink sector also decreased from \$111m to \$93m (16%), though since 2012 there has been a year on year increase on Drink sales turnover (a 12% increase between 2012 and 2015).

Table 16: Core NTE Hobart

Hobart	2009	2011	2012	2013	2014	2015	Change 2009 to 2015	
							No.	Percent
Establishments (number)								
Drink	71	70	69	64	59	62	-9	-13%
Entertainment	118	117	114	120	123	118	0	0%
Food	264	278	295	297	298	300	36	14%
Total	453	465	478	481	480	480	27	6%
Employment (employees)								
Drink	1,215	996	1,021	1,076	1,059	1,098	-117	-10%
Entertainment	1,286	1,368	1,269	1,562	1,483	1,443	157	12%
Food	3,396	3,083	3,168	3,245	3,479	3,602	206	6%
Total	5,897	5,447	5,458	5,883	6,021	6,143	246	4%
Sales turnover (\$m)								
Drink	111	97	93	99	103	104	-7	-6%
Entertainment	154	160	157	198	180	199	44	29%
Food	286	268	288	300	339	341	55	19%
Total	551	525	537	597	622	644	93	17%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

4.8 Maroondah

Food represents 71% of all core NTE establishments		
Establishments	↓ 5%	From 332 in 2009 to 317 in 2015
Employment	↓ 6%	From 2,628 in 2009 to 2,468 in 2015
Sales turnover	↓ 5%	From \$274m in 2009 to \$261m in 2015

Maroondah's NTE accounts for 14% of all establishments (1,381 out of 9,722). Collectively, these employ 10,693 people and generate sales turnover of \$2.4bn, making up 22% of Maroondah's employment and contributing to 18% of total turnover.

Figure 9: Change in Core NTE establishments, employment and sales turnover, Maroondah, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

Just under a quarter of NTE establishments (23%, 317 establishments) operate in Core NTE activities. The number of Core NTE establishments has fluctuated between 2009 and 2015, but overall there has been a 5% decrease over this period (see Figure 9). This correlates with a decrease of establishments as a percentage of the total economy, from 16.2% in 2009 to 14.2% in 2015. Core NTE establishment density by area has also decreased from 25.4 establishments/km² in 2009 to 22.6 establishments/km² in 2015.

Food makes up the majority of the Core NTE in terms of the number of establishments (224 establishments, 71%), employment (1,574 people, 64%) and sales turnover (\$149.1m, 57%), whilst Entertainment contributes 24%, 25% and 33% respectively.

The smallest sector in the Core NTE is Drink which makes up 5% of establishments (16 establishments), 11% of employment (267 people) and 10% of sales turnover (\$25.2). Food is the only sector that has grown since 2009 in terms of establishment numbers (14%), employment (23%) and sales turnover (39%). There has been a decline in the number of establishments (31%), employment (45%) and sales turnover (37%) between 2009 and 2015 in the Entertainment sector, and a decline in establishment numbers (33%) and sales turnover (15%) in the Drink sector.

Table 17: Core NTE Maroondah

Maroondah	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	24	26	21	18	18	16	-2	-13%
Entertainment	111	120	115	101	95	77	-18	-23%
Food	197	216	221	212	232	224	-8	-4%
Total	332	362	357	331	345	317	-28	-9%
Employment (employees)								
Drink	215	260	238	269	263	267	4	1%
Entertainment	1,137	892	899	854	799	627	-172	-27%
Food	1,276	1,366	1,465	1,421	1,528	1,574	46	3%
Total	2,628	2,518	2,602	2,544	2,590	2,468	-122	-5%
Sales turnover (\$m)								
Drink	30	36	22	25	26	25	0	-1%
Entertainment	136	105	111	108	97	86	-11	-12%
Food	108	119	133	131	149	149	0	0%
Total	274	260	266	264	271	261	-11	-4%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

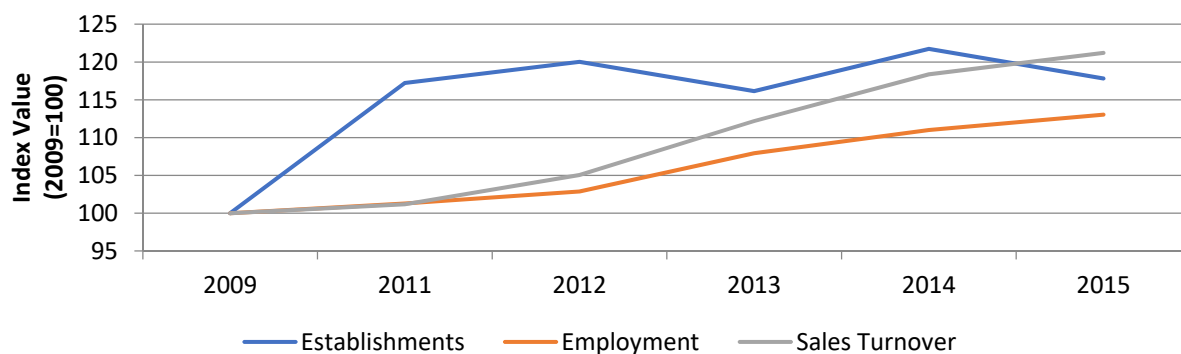
4.9 Melbourne

Food represents 69% of all core NTE establishments		
Establishments	↑ 18%	From 2,037 in 2009 to 2,400 in 2015
Employment	↑ 13%	From 23,942 in 2009 to 27,062 in 2015
Sales turnover	↑ 21%	From \$2.299bn in 2009 to \$2.787bn in 2015

37% of NTE establishments operate in Core NTE activities (2,400 establishments) which account for 38% of NTE employment and 21% of sales turnover. Between 2009 and 2015 there has been an 18% increase in the number of Core NTE establishments (from 2,037 in 2009 to 2,400 in 2015) (see Figure 10). Core establishment density by area also increased from 156.3 establishments/km² to 173.6 establishments/km². Core NTE employment and sales turnover have increased year on year since 2009, by 13% and 21% respectively.

The increases observed in Melbourne's Core NTE can be attributed to growth in the largest Core NTE sector, Food. Food accounts for 69% of Core NTE establishments (1,652 establishments), 67% of employment (18,230 people) and 62% of sales turnover (\$1.7bn). Despite a 5% decrease last year, the number of Food establishments has risen by 25% since 2009, employment has increased by 32% and sales turnover has increased by 48% (from \$1.2bn in 2009 to \$1.7bn in 2015).

Figure 10: Change in Core NTE establishments, employment and sales turnover, Melbourne, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

20% of Core NTE establishments operate in the Entertainment sector. Since 2009 there has been a 4% increase in the number of establishments in this sector (from 456 in 2009 to 475 in 2015). However, employment has declined by 19% (from 6,430 in 2009 to 5,208 in 2015) and sales turnover by 7% (from \$771m in 2009 to \$717m in 2015) during the same time period. There is nothing in the data to indicate what may have caused this.

Table 18: Core NTE Melbourne

Melbourne	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	256	254	258	240	260	273	13	5%
Entertainment	456	495	501	468	488	475	-13	-3%
Food	1,325	1,639	1,686	1,658	1,731	1,652	-79	-5%
Total	2,037	2,388	2,445	2,366	2,479	2,400	-79	-3%
Employment (employees)								
Drink	3,654	3,303	3,160	3,469	3,646	3,624	-22	-1%
Entertainment	6,430	5,303	5,472	5,589	5,560	5,208	-352	-7%
Food	13,858	15,641	15,999	16,781	17,369	18,230	861	5%
Total	23,942	24,247	24,631	25,839	26,575	27,062	487	2%
Sales turnover (\$m)								
Drink	360	345	287	321	355	343	-12	-4%
Entertainment	771	622	675	708	674	717	43	6%
Food	1,168	1,360	1,454	1,551	1,692	1,727	34	2%
Total	2,299	2,326	2,415	2,579	2,721	2,787	65	2%

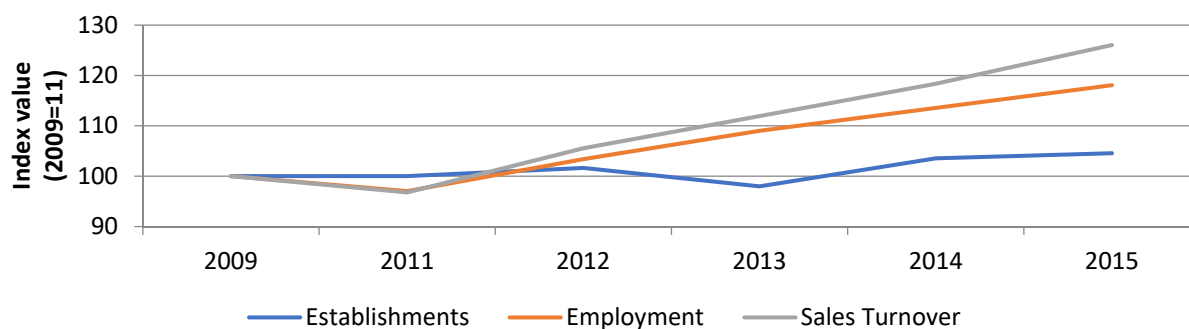
Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

4.10 Newcastle

Food represents 57% of all core NTE establishments		
Establishments	↑ 5%	From 789 in 2009 to 825 in 2015
Employment	↑ 18%	From 10,059 in 2009 to 11,877 in 2015
Sales turnover	↑ 26%	From \$1.011bn in 2009 to \$1.274bn in 2015

32% of NTE establishments operate in the Core NTE sector, employing 43% of NTE employees and generating a quarter of sales turnover. The number of Core NTE establishments increased by 5% between 2009 and 2015 (from 789 in 2009 to 825 in 2015). However, as a percentage of the total economy, Core NTE establishments have declined from 21% in 2009 to 18.7% in 2015. The number of employees in the Core NTE has increased from 10,059 in 2009 to 11,877 in 2015 (18%) and sales turnover has grown from \$1bn in 2009 to \$1.3bn in 2015 (26%) (see Figure 11). However, employment and sales turnover as a proportion of the total economy have decreased.

Figure 11: Change in Core NTE establishments, employment and sales turnover, Newcastle, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

The Core NTE is dominated by the Food sector, which accounts for 57% of establishments (470 establishments), 57% of employment (6,730 people) and 50% of sales turnover (\$637.4m). This is a growing sector with all three parameters increasing since 2009. 29% of establishments in the Core NTE operate in the Entertainment sector (243 establishments); this number has declined year on year with an overall decrease of 13% between 2009 and 2015. Despite an increase in employment within the Entertainment sector in 2012, this sector has seen an overall decline in employment between 2009 and 2015 of 9%. Sales turnover has fluctuated over the same period but a 12% increase between 2014 and 2015 (from \$426.3m to \$477.8m) has resulted in an overall growth of 4%. The smallest sector in the Core NTE is Drink which accounts for 14% of Core NTE establishments (112 establishments), 14% employment (1,676 people) and 12% of sales turnover (\$158.8). The number of Drink establishments decreased by 12% between 2009 and 2012 (from 111 establishments in 2009 to 98 in 2012) but has been steadily increasing since with a 14% increase between 2012 and 2015 (112 establishments in 2015).

Table 19: Core NTE Newcastle

Newcastle	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	111	101	98	102	104	112	8	7%
Entertainment	278	276	276	259	266	243	-23	-9%
Food	400	412	428	412	447	470	23	5%
Total	789	789	802	773	817	825	8	1%
Employment (employees)								
Drink	1,739	1,542	1,764	1,950	1,775	1,676	-99	-6%
Entertainment	3,831	3,419	3,761	3,453	3,519	3,471	-48	-1%
Food	4,489	4,801	4,873	5,563	6,127	6,730	603	9%
Total	10,059	9,762	10,398	10,966	11,421	11,877	456	4%
Sales turnover (\$m)								
Drink	173	160	160	180	173	159	-14	-9%
Entertainment	459	401	464	437	426	478	52	11%
Food	378	417	443	514	597	637	40	6%
Total	1,011	978	1,067	1,132	1,196	1,274	78	6%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

4.11 Parramatta

Food represents 78% of all core NTE establishments		
Establishments	↑ 27%	From 931 in 2009 to 1,182 in 2015
Employment	↑ 13%	From 7,646 in 2009 to 8,632 in 2015
Sales turnover	↑ 20%	From \$757m in 2009 to \$909m in 2015

There are 1,182 establishments operating in the Core NTE sector of the Parramatta economy, which account for 28% of the total NTE (4,200 establishments). The number of Core NTE establishments has increased by 27% since 2009. Despite this increase, as a percentage of total economy the number of Core NTE establishments has decreased from 18.6% in 2009 to 16.9% in 2015. Employment associated with Core NTE activities has increased from 7,646 in 2009 to 8,632 in 2015 (growth of 13%) and sales turnover has increased from \$757.7m in 2009 to \$908.7m in 2015 (see Figure 12).

Figure 12: Change in Core NTE establishments, employment and sales turnover, Parramatta, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

19% of Core NTE establishments operate in the Entertainment sector and this accounts for a quarter of Core NTE employment, a figure which increased by 6% between 2014 and 2015. Associated sales turnover in this sector also increased between 2014 and 2015 (growth of 20%), and accounts for 32% of Core NTE sales turnover. This increase was the first growth seen in the Entertainment sector's sales turnover since 2012.

The largest sector, Food, has been growing year on year since 2009. The number of establishments has increased from 646 in 2009 to 924 in 2015 (an increase of 43%). Employment and sales turnover also increased during the same time period, by 27% and 43% respectively. 78% of Core NTE firms operate in the Food sector. Collectively these employ 6,021 people (70% of Core NTE employment) and generate \$909m sales turnover (63% of Core NTE sales turnover).

The Drink sector is declining and contributes a relatively small amount to the Core NTE, accounting for only 3% of establishments, 6% employment and 5% sales turnover. Since 2009, there has been a 24% decrease in the number of establishments, an 11% decrease in employment and a 39% reduction in sales turnover in the Drink sector.

Table 20: Core NTE Paramatta

Parramatta	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	45	46	46	41	37	34	-3	-9%
Entertainment	240	250	234	220	219	224	5	2%
Food	646	761	804	778	886	924	38	4%
Total	931	1,057	1,084	1,039	1,142	1,182	40	3%
Employment (employees)								
Drink	550	700	678	709	570	489	-81	-16%
Entertainment	2,353	2,242	2,254	1,961	2,008	2,122	114	5%
Food	4,743	5,159	5,885	5,240	5,733	6,021	288	5%
Total	7,646	8,101	8,817	7,910	8,311	8,632	321	4%
Sales turnover (\$m)								
Drink	75	87	62	66	56	46	-9	-20%
Entertainment	282	263	278	248	243	292	49	17%
Food	400	448	535	484	559	570	12	2%
Total	757	798	874	798	858	909	51	6%

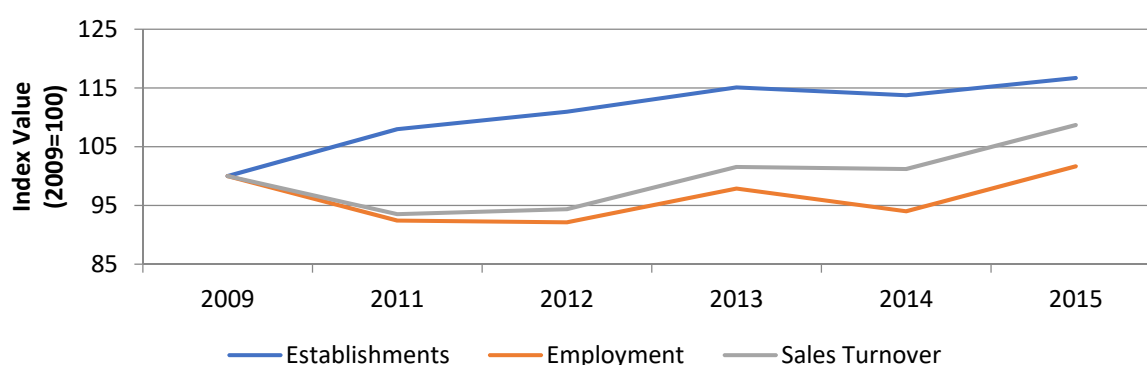
Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

4.12 Perth

Food represents 76% of all core NTE establishments		
Establishments	↑ 17%	From 676 in 2009 to 788 in 2015
Employment	↑ 2%	From 10,428 in 2009 to 10,601 in 2015
Sales turnover	↑ 9%	From \$976m in 2009 to \$1.061bn in 2015

The Core NTE in Perth accounts for 31% of establishments (789 establishments), 31% employment (10,601 people) and 17% sales turnover (\$1.1bn). The number of Core NTE establishments has increased year on year since 2009, resulting in a 17% increase between 2009 and 2015. Employment had declined by 6% between 2009 and 2014, though there was an 8% increase between 2014 and 2015 (see Figure 13) due to a growth of the Food sector and more specifically an increase in Takeaway Food Services. Core NTE employment as a percentage of the total economy has fallen from 25.7% in 2009 to 23.7% in 2015 while employment density by area has also decreased, from 4,896.6 employees/km² in 2009 to 4,213.5 employees/km² in 2015. Following a decrease between 2009 and 2011, Core NTE sales turnover has increased by 16% (2011-2015).

Figure 13: Change in Core NTE establishments, employment and sales turnover, Perth, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

Food is the largest Core NTE sector in terms of establishments (599 establishments, 76%), employment (7,334 people, 69%) and sales turnover (\$694m, 65%). There has been growth in all three since 2009; a 31% increase in the number of establishments, a 13% increase in employment and a 27% increase in sales turnover. Entertainment and Drink contribute equally to the Perth economy in terms of number of establishments (12%) and sales turnover (17%). The Drink sector accounts for 18% of employment compared to 13% for Entertainment. There was a 35% decrease in sales turnover in Entertainment activities between 2009 and 2014, though the most recent year saw a 9% increase.

Table 21: Core NTE Perth

Perth	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	91	98	109	116	99	91	-8	-9%
Entertainment	128	130	125	128	112	98	-14	-14%
Food	457	502	516	534	557	599	42	7%
Total	676	730	750	778	768	788	20	3%
Employment (employees)								
Drink	1,774	1,588	1,756	2,010	1,928	1,938	10	1%
Entertainment	2,148	1,807	1,490	1,403	1,383	1,329	-54	-4%
Food	6,506	6,244	6,364	6,796	6,493	7,334	841	11%
Total	10,428	9,639	9,610	10,209	9,804	10,601	797	8%
Sales turnover (\$m)								
Drink	170	158	160	186	188	184	-4	-2%
Entertainment	258	212	184	178	168	183	15	8%
Food	548	543	578	628	633	695	62	9%
Total	976	913	921	991	988	1,061	73	7%

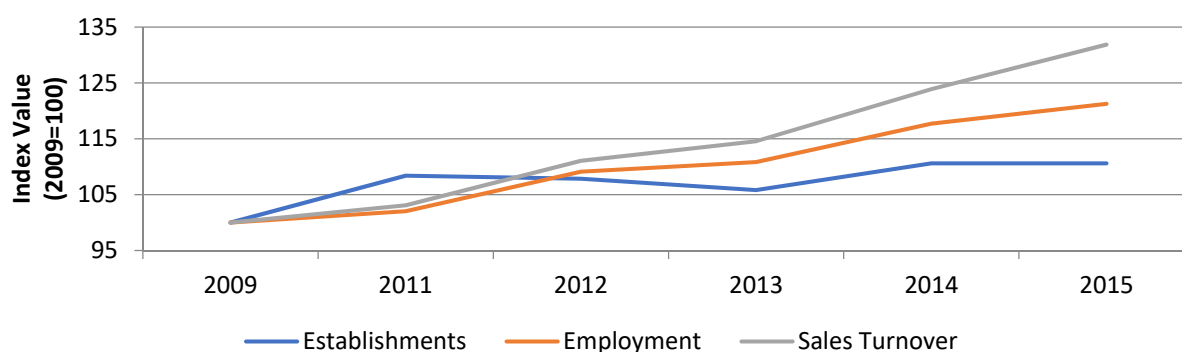
Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

4.13 Port Phillip

Food represents 73% of all core NTE establishments		
Establishments	↑ 24%	From 506 in 2009 to 626 in 2015
Employment	↑ 21%	From 10,357 in 2009 to 12,556 in 2015
Sales turnover	↑ 32%	From \$1.032bn in 2009 to \$1.361bn in 2015

29% of NTE establishments (1,199 establishments) operate in Core NTE activities. The number of Core NTE establishments has fluctuated between 2009 and 2015, but overall there has been an 11% increase since 2009. There was no change between 2014 and 2015 (see Figure 14). This correlates with a decrease of establishments as a percentage of the total economy from 25.0% in 2009 to 22.1% in 2015. Core NTE employment and turnover also increased between 2009 and 2015, by 21% and 32% respectively.

Figure 14: Change in Core NTE establishments, employment and sales turnover, Port Phillip, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

Over half of Core NTE establishments operate in Food activities (626 establishments, 52%). These account for 56% of Core NTE employment (6,988 people) and 49% of sales turnover (\$661.9m). There has been growth in all three parameters since 2009 in the Food sector; a 24% increase in establishments, a 32% increase in employment and a 48% increase in sales turnover. Entertainment accounts for 38% of Core NTE establishments, 32% of employment and 41% of sales turnover. Despite a 3% decline in the number of establishments in this sector between 2009 and 2015, there has been a 16% increase in employment (from 3,441 in 2009 to 4,008 in 2015) and a 34% growth in sales turnover (from \$412.4m in 2009 to \$551.7m in 2015). Drink, the smallest sector of the Core NTE, accounts for 10% of establishments (119 establishments), 12% of employment (1,560 people) and 11% of sales turnover (\$147.8m). Although there was a decrease of 3% in the number of Drink establishments between 2009 and 2012, there has been a 9% increase between 2012 and 2015. Sales turnover in the Drink sector has decreased by 14% over the period 2009–2015.

Table 22: Core NTE Port Phillip

Port Phillip	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	112	115	109	114	117	119	2	2%
Entertainment	6	5	6	6	6	7	1	14%
Food	466	483	469	453	473	454	-19	-4%
Total	506	577	591	580	609	626	17	3%
Employment (employees)								
Drink	1,607	1,562	1,539	1,572	1,626	1,560	-66	-4%
Entertainment	3,441	3,539	3,692	3,559	3,843	4,008	165	4%
Food	5,309	5,463	6,069	6,347	6,722	6,988	266	4%
Total	10,357	10,564	11,300	11,478	12,191	12,556	365	3%
Sales turnover (\$m)								
Drink	173	174	140	145	158	148	-11	-7%
Entertainment	412	415	455	451	466	552	86	16%
Food	447	475	551	587	655	662	7	1%
Total	1,032	1,064	1,146	1,183	1,279	1,361	82	6%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

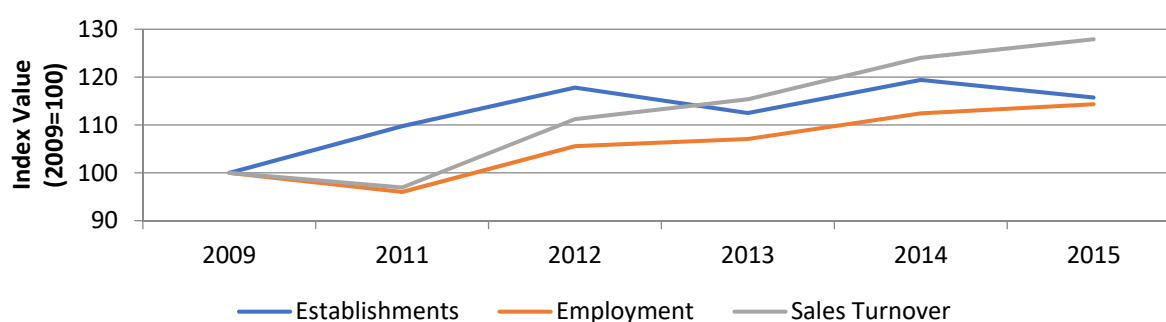
4.14 Sydney

Food represents 71% of all core NTE establishments		
Establishments	↑ 16%	From 3,980 in 2009 to 4,608 in 2015
Employment	↑ 14%	From 28,346 in 2009 to 32,411 in 2015
Sales turnover	↑ 28%	From \$2.843bn in 2009 to \$3.637bn in 2015

Sydney's NTE accounts for 29% of all establishments. Collectively, these employ around 113,847 people and generate sales turnover of \$19.3bn, making up 27% of total employment and contributing 22% of total turnover.

37% of NTE establishments operate in Core NTE activities. The Core NTE has grown since 2009 with increases in the number of establishments (16%), employment (14%) and sales turnover (28%). Food makes up the majority of the Sydney Core NTE in terms of establishment numbers (71%), employment (62%) and sales turnover (52%), whilst Entertainment contributes 18%, 22% and 31% respectively. The smallest sector in Sydney's Core NTE is Drink which accounts for 12% of firms, 16% employment and 16% of turnover. With the exception of the number of establishments in the Entertainment sector which has seen a decrease of 1% since 2009, all three sectors of the Core NTE (Food, Drink and Entertainment) grew between 2009 and 2015 in terms of number of establishments, employment and sales turnover.

Figure 15: Change in Core NTE establishments, employment and sales turnover, Sydney, 2009–2015



Source: OrtusER/Australian Bureau of Statistics, 2017

The number of Food establishments increased from 2,729 to 3,254 (19%); associated employment increased from 17,299 people to 20,064 (16%) and sales turnover rose from \$1.5bn to \$1.9bn (30%).

The Drink sector has seen a 28% increase in establishment numbers (from 416 to 531), a 19% increase in employment (4,311 to 5,147) and a 34% increase in sales turnover (\$445m to \$597m).

Whilst the number of Entertainment firms decreased by 1% overall since 2009, it has grown 5% since 2013. Employment increased from 6,736 to 7,200 (7%) and sales turnover 21% from \$940m to \$1.139bn.

Table 23: Core NTE Sydney

Sydney	2009	2011	2012	2013	2014	2015	Change 2014 to 2015	
							No.	Percent
Establishments (number)								
Drink	416	429	562	547	575	531	-44	-8%
Entertainment	835	874	838	783	824	823	-1	0%
Food	2,729	3,066	3,290	3,148	3,354	3,254	-100	-3%
Total	3,980	4,369	4,690	4,478	4,753	4,608	-145	-3%
Employment (employees)								
Drink	4,311	3,988	4,804	5,179	5,287	5,147	-140	-3%
Entertainment	6,736	6,573	6,786	6,913	7,282	7,200	-82	-1%
Food	17,299	16,651	18,337	18,256	19,302	20,064	762	4%
Total	28,346	27,212	29,927	30,348	31,871	32,411	540	2%
Sales turnover (\$m)								
Drink	445	422	535	586	631	597	-34	-6%
Entertainment	940	886	962	1,006	1,014	1,139	125	11%
Food	1,458	1,447	1,666	1,687	1,881	1,900	20	1%
Total	2,843	2,756	3,162	3,280	3,526	3,637	111	3%

Source: OrtusER/Australian Bureau of Statistics, 2017, W1/S17

5. Appendix

5.1 Glossary

Abbreviation/Term	Explanation
ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification, 2006. System of classifying economic activity.
Core NTE	Activities that make up the core of the night time economy. See Table 24. Examples include: restaurants, food take-aways, pubs, clubs, theatres and cinemas.
Density	This considers the concentration of economic activity within a given geographic space. For example, it may consider the number of enterprises per square kilometre. Density is a useful measure of intensity and general vibrancy. Conversely, density in respect of, say drinking establishments, may indicate a potential problem arising from alcohol-related anti-social behaviour.
Employment	Number of employees associated with the establishments delivering services.
Establishment	Business or other organisation involved in the NTE.
Non-core NTE	Activities associated with the NTE but which may take place mainly during the day, eg retailing or are only partially involved, eg overnight accommodation. See Table 25. Examples include: taxis, hotels, food retailing, and regulatory services.
NTE	Night Time Economy
Perturbation	This is a technique used, usually in official statistics, to prevent disclosure, viz allowing readers to estimate confidential data about individual records. ABS uses rounding to limit this disclosure risk, which means that there can be significant volatility for those elements which have few numbers, eg rounding to the nearest 10, could mean a value changing from 10 to 0, even though the underlying data only varied from 5 to 4.
Sales turnover	Revenues generated from economic activity.
Supply NTE	Activities mainly in the supply chain. See Table 26. Examples include: food and drink manufacturing and distribution, catering, food and drink wholesaling and music.

5.2 Method

Preparing the data analysis presented in this report involved three distinct elements of work:

1. NTE definition and data acquisition
2. Data analysis and review
3. Preparation of the report

5.2.1 NTE definition and data acquisition

The definition of the NTE is now well established based on numerous studies carried out in Australia, New Zealand and the UK.

Essentially, the Night Time Economy refers to a range of leisure activities that are predominately, if not exclusively, consumed between 18.00 (6pm) and 06.00 (6am). The activities are grouped into three main categories:

- **Core NTE**, which in turn comprise three main areas of activity: Drink, Entertainment and Food delivered during the night time.
- **Non-core NTE** activities include service activities which operate in the evening and night time to a greater or lesser degree.
- **Supply NTE** activities include supply chain activities which support the Core and Non-Core NTE.

All three categories are further defined by the Australian and New Zealand Standard Industrial Classification (ANZSIC) codes. The various codes are presented in section 5.3, below.

5.2.2 Data acquisition

Prior work also enabled a relationship to be built with ABS so that data could be sourced at ANZSIC level for all states and a selection of LGAs.

However, changes to licensing regulations influenced the manner in which some establishments were coded, resulting in some discontinuities to the data over time. Of greater concern was the application of rounding or perturbation, which meant that small changes in numbers within a small population could lead to apparently major percentage increases or decreases. For this reason, it was decided that publishing data at the level of ANZSIC codes was potentially misleading.

5.2.3 Data analysis and review

The data, once acquired from ABS, was reviewed and analysed in a systematic manner across the administrative geographies of nation, state and LGA. The data for each location were reviewed by NTE element: core, non-core and supply, across the three metrics of: establishment, employment and sales turnover. The core activities of: Drink, Entertainment and Food were analysed at the level of ANZSIC and then aggregated for publication. The analysis replicated the approach used in prior studies, which involved a degree of modelling to ensure consistency of historical data.

As noted previously, changes to legislation and perturbation through rounding, mean that caution must be applied when considering detailed data over time. Small changes can be overstated as a result of rounding and changes to legislation may cause major differences, if for example a business is reclassified from one group to another.

5.3 Definitions

Activities within the Night Time Economy are defined using the Australian and New Zealand Standard Industrial Classification (ANZSIC) 2006. **Core NTE** activities are classified in three key sectors: Food, Drink and Entertainment, which include all leisure-based services which are accessed by members of the public (local inhabitants, local employees, tourists and business visitors) predominantly during the evening and night time (6pm to midnight and beyond). While the business activities included in the Core NTE definition are not restricted to this period, the definition is designed to capture those activities in which the majority of sales turnover is generated during these times. See Table 24, below.

Table 24: Core NTE activities

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

Source: OrtusER. * For historical reasons, ANZSIC 551 (Motion Picture and Video Activities) is included within the Core NTE definition for City of Sydney, but is included in the Non-Core NTE definition in other LGAs.

Non-Core NTE activities include service activities which operate to a greater or lesser degree in the evening and night time. Non-Core NTE activities include predominantly day-time activities such as retail trading (except liquor retailing, which is included in the Core NTE definition), and hotels and guest houses which, while providing overnight accommodation, are more usually on the fringes of leisure activity provision.

Table 25: Non-Core NTE activities

Sector	ANZSIC	Activity
Care	771	Public Order and Safety Services
	840	Hospitals
Cultural	601	Libraries and Archives
Design	692	Architectural, Engineering and Technical Services
Education	821	Adult, Community and Other Education
Food Retailing	411	Supermarket and Grocery Stores
	412	Specialised Food Retailing
Hospitality	4400	Accommodation
Infrastructure	29	Waste Collection, Treatment and Disposal Services
	751	Central Government Administration
	753	Local Government Administration
	772	Regulatory Services
	9531	Laundry and Dry Cleaning Services
Promotion	694	Advertising Services
Research	695	Market Research and Statistical Services
Other Retail	422	Electrical and Electronic Goods Retailing
	424	Recreational Goods Retailing
	425	Clothing, Footwear and Personal Accessory Retailing
	426	Department Stores
	427	Pharmaceutical and Other Store Based Retailing
Transport	462	Road Passenger Transport
	472	Rail Passenger Transport
	482	Water Passenger Transport
	9533	Parking Services

Source: OrtusER

Supply NTE activities include supply chain activities which support the Core and Non-Core NTE.

Table 26: Supply NTE activities

Sector	ANZSIC	Activity
Drink	12	Beverage and Tobacco Product Manufacturing
	3606	Liquor and Tobacco Product Wholesaling
Entertainment	552	Sound Recording and Music Publishing
Food	11	Food Product Manufacturing
	4513	Catering Services

Source: OrtusER