

# Planning for Canberra's night-time economies



Research paper

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ACT Planning &  
Land Authority



# 1. Introduction

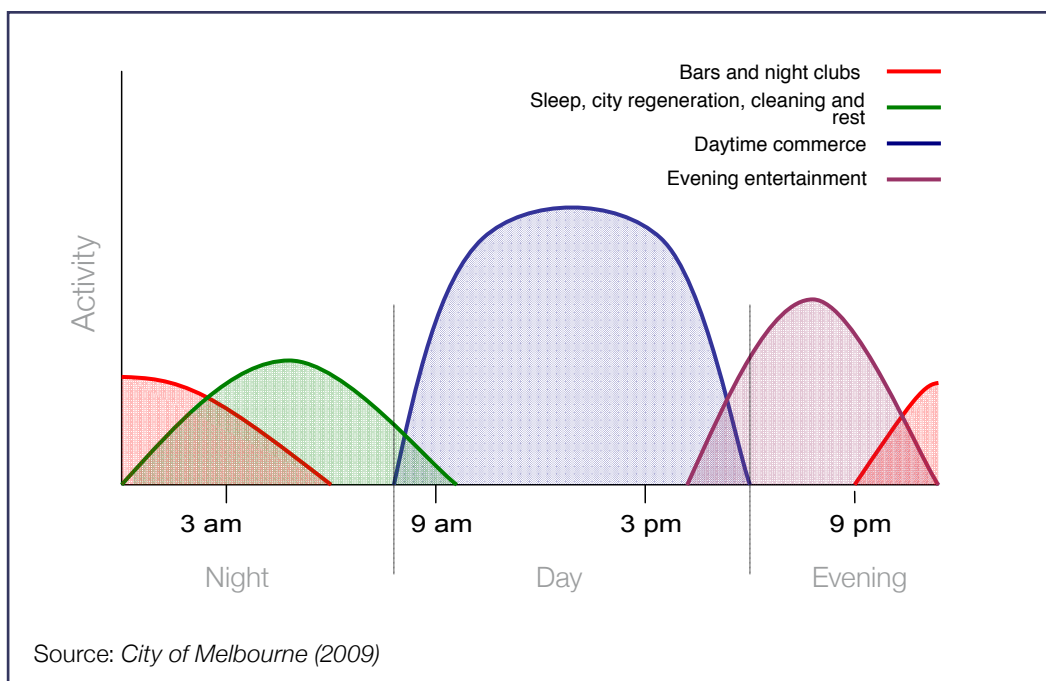
Canberra's social and economic life doesn't end when the day finishes.

This paper examines what can be understood as the 'night-time economy' (NTE). It builds on background research by the ACT Planning and Land Authority (ACTPLA) to inform planning for social infrastructure and the review of Territory Plan policies for commercial centres and zones. It considers how the 'night-time economy' can be defined, where it takes place in Canberra, the performance of live music and the ACT's distinctive licensed club sector.

## 2. What is the 'night-time economy' – definition and background

All cities, including Canberra, have NTEs, where people meet, play, consume and produce. The term encapsulates certain social and business activities and the period of 'the night'. Various authors have written of the 'rhythms' of cities in terms of patterns of the use of buildings, streets, plazas and other public spaces at different points through the day and night-time (cf. Bianchini 1995). Often, 'the night' has been seen as sinister or associated with danger or immorality. However, others have emphasised that the night within cities is also widely experienced in positive terms as a time of socialisation and encounter (Lovatt and O'Connor 1995).

Representation of Melbourne City Rhythms<sup>1</sup>



1. Some authors make a distinction between 'the evening economy' and 'the night time economy'. However, for simplicity this distinction is not used here with 'the night' being used to denote the period roughly between 6pm and 6am.

The emergence of the NTE as an idea within planning and urban governance appears to date from Britain in the early-1990s (Bianchini 1995)<sup>2</sup>. Academic and policy research from around the world suggests that many cities over the past two decades have deliberately fostered NTEs as a renewal strategy, often in combination with ‘cultural planning’ or ‘creative cities’ strategies.

In examining the ACT, the NTE is defined here primarily in terms of the hospitality and entertainment industries, and issues associated with these industries. The term ‘NTE venue’ will generally refer to hospitality and entertainment venues such as restaurants, pubs, nightclubs, cinemas, casinos, concert halls, theatres and licensed clubs. Larger venues such as Canberra Stadium, the National Convention Centre and the Exhibition Park in Canberra also host NTE events on occasion.

Many non-hospitality and non-entertainment related economic activities also take place at night, including cleaning services, education, government services, retailing, baking and other forms of food preparation, and logistics activities. However, these activities are not examined in this paper as they are not thought to pose major planning issues through their night-time operations. Similarly, certain sub-sectors of the NTE such as the sex industry, which in the ACT is primarily regulated outside of the planning system<sup>3</sup>, will not be examined.

Even when narrowly-defined, the NTE can present a number of planning challenges. These include:

- mediating between the expectations and behaviours of different social groups including, in particular, the potential for the expectations and behaviours of younger people to clash with those of the middle-aged and vice versa
- balancing the established functions of commercial centres as sites of NTE venues with increased residential development in and around these centres
- managing diverging views within the community around the public consumption of alcohol and the location of licensed venues
- addressing perceptions and realities of safety in and around concentrations of NTE venues.

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2. Particular cities frequently come to be seen as essentially embodying urban theories or concepts. In the same way as Los Angeles is used as a typical example of car-based suburbanism, the cities of northern England – such as Manchester, Leeds, Liverpool, Newcastle-upon-Tyne – are often associated with the idea of the NTE.

3. The ACT's sex industry is primarily regulated through the Prostitution Act 1992 and the Prostitution Regulation 1993, the latter of which restricts brothels to Mitchell and Fyshwick.



Woolley Street, Dickson

### 3. The scale and locations of Canberra’s NTEs

While Canberra as a whole can be said to have a NTE, it is also useful to think of the city as having multiple NTEs spread across various locations or catering towards different social groups based upon factors such as age. Businesses operating with these NTEs can be generally sub-categorised as either hospitality-orientated or entertainment-orientated, although there is considerable crossover between the two categories (e.g. many licensed clubs offer both food and live music performances).

#### 3.1 The hospitality industry

Within the NTE the hospitality industry encompasses venues where the primary activities are the service of food and drink – such as restaurants, pubs, cafes, and bars <sup>4,5</sup>. While the industry conducts business during the day, the night-time, and particularly the evening (i.e. from approximately 5pm to 10pm), is very important to the sector and is the sole period of trading for many venues.

ACTPLA regularly collects data on business activities and land use within commercial centres. A 2009 survey found that Civic, Manuka, Dickson, and Kingston were major hubs of hospitality industry venues (although the survey did not collect data on the peak periods of business for individual venues). The town centres, Weston (the major centre serving the Weston Creek district) and Braddon (effectively an adjunct to Civic) also contained significant numbers of venues.

Number of Selected Hospitality Industry Venues in Selected Commercial Centres – 2009 Commercial Floorspace Inventory Survey

Commercial centre	Number of restaurants, clubs, drink establishments and cafes
Civic	100
Manuka	43
Dickson	34
Kingston	34
Belconnen Town Centre	25
Gungahlin Town Centre	18
Tuggeranong Town Centre	18
Woden Town Centre	14
Braddon	12
Weston	11
Erindale	10
<b>ACT total</b>	<b>444</b>

Note: The survey on which this table is based did not collect data about opening hours or peak patronage hours at individual venues. Venues contained within larger commercial developments (e.g. food courts within malls or cafes within office buildings) and some takeaway food outlets are not included.

4. In other contexts the hospitality sector is sometimes conceptualised as also including commercial accommodation businesses.

5. The operation of licensed NTE venues is primarily regulated through the Liquor Act 2010.

Partly because of planning restrictions on drink establishments and licensed clubs, most local centres are less prominent as sites of NTE, although some centres in the Inner North (i.e. O'Connor, Lyneham, and Ainslie) do have relatively active NTEs and most local centres have at least one restaurant or takeaway outlet.

Qualitatively, Canberra's different NTE centres are often orientated towards different types of customer or NTE experience. For example, Dickson has long been well known for its cluster of Asian cuisine restaurants, whereas Kingston and Manuka are known for hosting numbers of relatively upmarket venues.

### 3.2 The entertainment industry

The entertainment industry in Canberra is similarly spread across the city, and can also be understood in terms of several broad types of venue. While many venues also operate during the day, their peak business periods tend to be at night and thus they should be considered as part of the NTE. The main forms of entertainment industry venue are covered below:

#### **Cinemas**

Cinemas are a widely patronised form of entertainment venue in Canberra across all age groups. Multi-screen cinema complexes can be found in Civic, each of the town centres (except Gungahlin Town Centre) and Manuka. The National Film and Sound Archive also operates the single-screen Arc Cinema in its building in Acton.

#### **Popular live music and theatre venues**

A number of venues around Canberra regularly host professional and amateur live music acts across the various major popular music genres – pop, rock, dance, folk and jazz, as well as touring commercial theatre (e.g. musical shows, comedy productions).

These range in size from the AIS Arena in Bruce, the National Conference Centre and the Canberra Theatre Centre in Civic, which host the largest touring acts, to restaurants or bars occasionally allocating a corner to an artist. With the possible exception of some nightclubs orientated towards dance music, unlike in some other cities, there is currently no mid-sized commercial, privately-owned venue that does not perform a double-duty as a pub or licensed club. Most venues are in one of the larger centres, although Tilley's in the Lyneham local centre has a long established reputation as a venue for certain music genres.

Outside of the commercial centres, the student refectories of the University of Canberra (Bruce) and Australian National University (Acton) frequently host medium-sized shows. The University of Canberra also rents its grounds for larger outdoor concerts (such as the 'Stonefest' and 'Groove in the Moo' festivals) and the Exhibition Park in Canberra (EPIC) regularly hosts special events such as the National Folk Festival.

## High culture venues

Beyond popular music venues, Canberra also has venues hosting 'high culture' (i.e. traditional performing arts such as classical music, opera, ballet and 'legitimate theatre' events). While high culture performances may in some cases attract sizeable (and typically older) audiences, they are often publicly funded rather than being solely reliant on commercial sources of income.

The city's two most significant high culture venues are probably the Canberra Theatre Centre and Llewellyn Hall in Civic. These co-exist in the city centre with smaller venues such as The Street Theatre, and Theatre 3 (The Canberra Repertory Theatre). Other smaller performing arts venues can also be found around the city, including the Erindale Theatre, Albert Hall and the Tuggeranong Arts Centre.

## Gambling venues<sup>6</sup>

Gambling at an entertainment venue is a not uncommon pastime among Canberra residents. In a recent survey, around 30% of ACT adults reported playing electronic gaming machines in the last year and about 8% said that they had played table games at a casino (Davidson and Rodgers 2010: 19). The ACT's only casino, the Canberra Casino, is in Civic, while a large number of licensed clubs operate gaming machines. Both the casino and licensed clubs also offer hospitality services and often other forms of entertainment such as live music.

## Professional sports venues

The Canberra Stadium in Bruce is the home venue of the city's professional rugby union and rugby league teams. Both teams often play at night, attract sizable crowds and provide associated hospitality and non-sport entertainment. Other sports such as soccer and motocross also use the stadium from time-to-time. However, unlike in some other cities which have hospitality precincts associated with a stadium, there is not currently a cluster of nearby hospitality venues.



Queue outside of Mooseheads, London Circuit, Civic

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6. Gambling in the ACT is largely regulated through the *Gaming Machine Act 2004* and the *Casino Control Act 2006*.

### 3.3 Quantitative estimates of the economic size and organisational structure of the ACT's NTE

Estimating the economic scale of the NTE is difficult due to the limits of publicly available data collected by the Australian Bureau of Statistics (ABS) and other organisations. For example, certain NTE activities such as nightclubs can be difficult to identify in the ABS' readily available economic data products. Existing data sets that do cover NTE activities (such as restaurants) do not differentiate between the proportion of revenue generated or staff employed during the day or night-time. Finally, in several of its relevant releases the ABS itself notes that the validity of various estimates is subject to methodological problems.

- In 2006 the ABS estimated there were 690 firms making up the 'food and entertainment' sector in Canberra comprising of pubs, taverns, bars, cafés, restaurants and licensed clubs, with a combined turnover of \$464.2 million (representing about 12 per cent of total ACT retail turnover) (ABS 2007). In 2008, the Office of Regulatory Services reported that at that time 311 on-licenses and 64 club licenses for the sale of alcohol had been issued (JACS 2008).
- The sector is characterised by both a large number of firms, as well as diversity in the scale of these firms. Most (60 per cent) are relatively small scale enterprises employing 1-19 staff, although there are both significant proportions of firms that don't employ staff or have more than 20 staff (ABS 2007).
- Despite its orientation towards smaller businesses, larger local multi-venue NTE businesses do exist. For example, the Belluci's Hospitality Group (owned by a consortium of investors) operates a number of venues including Cream (Civic), Sub-Urban (Dickson), Verve (Manuka) and Belluci's restaurants (Manuka and Woden) (ACTAHA 2009).
- In 2007, 6000 people were estimated as being employed in cafés and restaurants, 2000 in licensed clubs, and 600 in pubs, taverns, and bars – approximately 4.5 per cent of the ACT workforce (ABS 2007). Other data sets suggest that much of this employment is of a casual or part-time nature and is relatively low-paid (Allen Consulting Group 2008; ACT Government 2006).
- Notably, in a different release, the ABS estimated the total income of the ACT restaurant, café, and catering sector (excluding clubs, pubs, bars, and taverns) is 257% of the size of the equivalent Tasmanian sector, and 55% the size of the South Australian sector, despite the ACT having a significantly smaller population than either of those two states. Across Australia, the ACT is home to 3.3% of the national restaurant, café and catering sector while having only approximately 1.5% of the national population (ABS 2008). This strength is likely due to a combination of the ACT's relatively high household incomes as well as business derived from Canberra's role as the national capital.
- The relative strength of the local hospitality industry is also borne out in data on household consumption patterns. On average, ACT households spent more on eating out than any other jurisdiction (\$58.22 per week against the national average of \$42.10 or \$47.79 on average in NSW). ACT households also spent more than the national average on alcoholic beverages (\$24.51 vs. \$23.32) but less than NT, WA and Tasmanian households (ABS 2006).

## 4. Two topical issues – planning for live music and the licensed club sector

Building on the above, two topical issues are worth further discussion. The first, planning for live music, has recently arisen in many Australian cities including Canberra. The second, the licensed club sector, while also present in many other cities, is relatively prominent within Canberra economic and community life and is thus also deserving of special consideration in planning the city's NTE.

### 4.1 Planning for live music

Live music is a key dimension to the cultural life of any city and a large number of popular and high culture music venues already exist across Canberra. These venues, their shows and their audiences play a very important role in contributing to the vibrancy of commercial centres after dark.

Recently, there has been considerable public debate across Australia around access to live music and the impacts of live music within urban life and, more specifically, the viability of live music venues in the face of regulatory change and contemporary residential development patterns. Over the last decade there have been well-organised movements in several cities (including Save the Music in Brisbane, Save Live Australian Music in Melbourne and the national Live Music (R)evolution campaign run by several peak bodies) which have generated considerable publicity and drawn undertakings from elected representatives to take various actions.

In some senses, such debates have been present in Australian cities since the emergence of rock 'n roll (if not earlier). As Shane Homan (2003) has detailed in his study of 'live music and law and order' in Sydney, controversies around live music venues, linked to the emergence of new forms of pop music and youth culture, have been a recurring feature of that city's politics since the 1950s. However, more recently these sorts of social conflict appear to have taken a new turn, with links being made between the closure of venues and increased residential development in the centre of cities and inner suburbs where many traditional live music venues have tended to be located.

Across most major cities, state and local governments – typically combining planning, liquor licensing, policing, arts and environmental noise protection agencies – have consequently sought to formulate planning and policy responses to such debates (cf. Burke and Schmidt 2009).

The Brisbane City Council's (2004) Valley Music Harmony Plan (which covers the inner-city suburb of Fortitude Valley) is perhaps the best-known attempt by a local government to create a place-based framework for accommodating live music in an inner city setting. The plan identifies a 'special entertainment area', sets out special noise emission standards, requires new development to comply with noise attenuation measures and establishes dispute resolution processes and a communications strategy. The City of Melbourne has similarly been active in promoting noise attenuation measures and providing 'education' programs for the residents of inner city apartments.

In terms of state government responses, in 2009 the NSW Government's Department of Planning took steps to recognise that the performance of music is both a common and legitimate activity across all forms of NTE venues (NSW Department of Planning 2009). Specifically, it removed 'place of public entertainment' (or 'POPE') licenses and 'nightclub' from the state's planning framework (with the consequence of modifying the local environment plans of the state's local governments). Accordingly, restaurants, clubs and pubs no longer need to apply for a special POPE license if they are to host live music.

In the ACT, the Legislative Assembly's Standing Committee for Planning, Public Work and Territory and Municipal Services conducted an inquiry throughout 2009-10 into 'live community events'. The inquiry gave particular attention to the ACT's live music economy and culture and issues such as planning and environmental noise regulation. An interim report was delivered in December 2009 and a final report was released in August 2010<sup>7</sup>. From a planning perspective, ACTPLA will consider the accommodation of live music within the review of Territory Plan policies for commercial zones.

## 4.2 The licensed club sector

Parallel to the experience of NSW (but not to that of other parts of Australia such as Victoria or South Australia) the licensed club sector is relatively prominent within the ACT's NTE, and is thus worth examination.

Following the end of the World War Two, the NSW government sought to reform the sale of alcohol through adopting the legal form of the upper/middle class men's club as its preferred model in liberalising liquor licensing. This model also came to be adopted in the ACT, with the number of clubs in Canberra similarly growing from 1 in 1944 (NCDC 1965: 63) to 17 in 1956 and 36 in 1972 (Caldwell 1972: 199). Today, there are around 64 licensed club venues across Canberra (JACS 2008). As in NSW, in 1975 ACT clubs were given permission to operate gaming machines, and continue to hold a monopoly on such machines (i.e. other potential operators such as pubs and the casino cannot apply for gaming machine licences).

Building on this history, in addition to their various other community and business activities, many licensed clubs today are substantial hospitality and entertainment operations. In a 2009 survey commissioned by ACTPLA, ACT residents reported these functions were by far the most favoured aspects of clubs. Among the various categories of things respondents liked about clubs, 69% nominated their role as places for dining and drinking and 60% nominated their role as a meeting place for friends. In contrast, their community support activities (10%) and involvement in sport (12%) were considerably less likely to be nominated.

More broadly, research commissioned by ACTPLA and other organisations has long found that clubs are very widely patronised by the Canberra community:

Study	Overall club usage
2009 – Winston Sustainable Research Strategies (n = 1000 ACT residents)	86% of participants reported use of Canberra licensed clubs in the previous 12 months.
2008 – Allen Consulting Group	On average each adult in the ACT is a member of 1.9 clubs
2004 – Artcraft Research (n= 650 residents of the Gungahlin district and suburb of Dunlop)	64% of participants reported use of Canberra licensed clubs.
2004 – Marshall et al (ANU) (n = 2,447 residents of the Tuggeranong district)	78% of participants reported use of Canberra licensed clubs.

Note: The Marshall et al (ANU) study was commissioned by the ACT Government's Gambling and Racing Commission, the Allen Consulting Group study was commissioned by ClubsACT and the other two studies were commissioned by the ACT Planning and Land Authority.

7. Both reports can be found at: [http://www.legassemblies.act.gov.au/downloads/reports/PPW04and07%20Live\\_interim%20and%20final.pdf](http://www.legassemblies.act.gov.au/downloads/reports/PPW04and07%20Live_interim%20and%20final.pdf)

Legally, clubs are not-for-profit organisations that must be run for the benefit of their members by boards that are democratically accountable to their membership. However, many clubs in Canberra are financially substantial entities. In 2007, a survey of 31 club organisations affiliated with ClubsACT (ACG 2008) found that these clubs employed 648 full-time, 116 part-time and 1342 casual staff<sup>8</sup>. The clubs reported total revenue of \$272.5 million, of which 62.5% was derived from gaming machine operations. Collectively, the clubs held \$211.3 million in assets (mostly buildings and facilities) and had \$72.6 million of debt.

Within the sector, several large multi-venue club groups have emerged over time (for example, the Raiders and Vikings club groups). Such groups have usually grown through the building of new club venues as Canberra has grown, and through the acquisition of other clubs (typically where the latter have run into financial difficulties, for example the acquisition of the Wests (Western Districts Rugby Union Club) group by the Southern Cross Club group in 2009).

Clubs are often the first large NTE businesses (other than restaurants and takeaways) to establish in new greenfield areas, as has been seen in Gungahlin. In consultation, an NTE industry operator has suggested this is, in part, due to the ability of clubs to subsidise food and drink prices through gaming revenue, combined with the residents of these areas often being relatively price-sensitive. Certainly beyond the Civic area and Kingston, Manuka and Dickson, clubs are often focal points of Canberra's suburban NTEs.

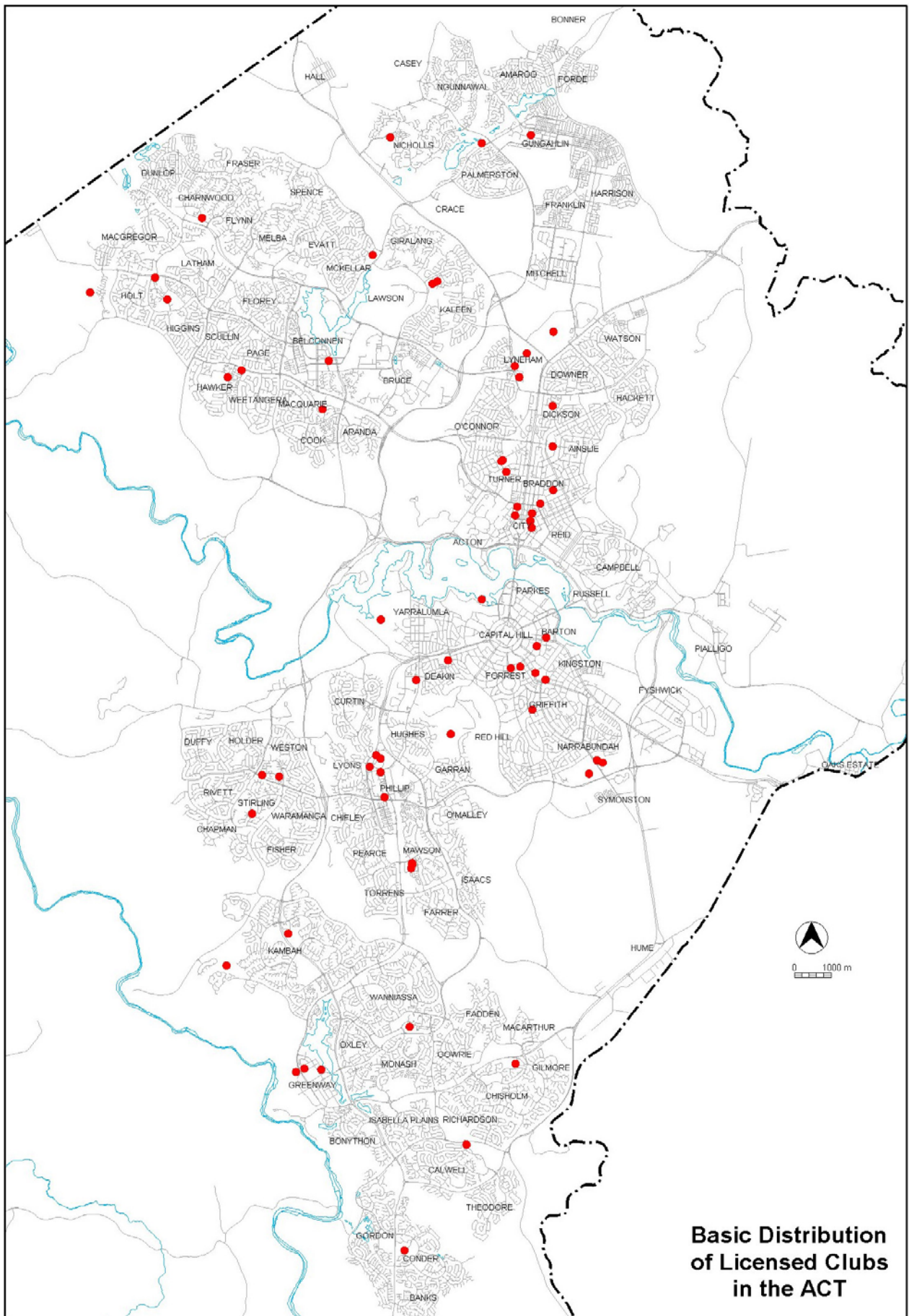
Following a recent policy decision by the ACT Government to allow existing gaming machine licence holders to potentially transfer licences to new venues, it is believed that sites for new clubs are likely to be needed as Molonglo Valley and the remainder of Gungahlin are planned and developed.



Garema Place, Canberra City

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8. i.e. approximately 1.1% of the total ACT workforce of 196,000 persons had some sort of employment relationship with a club.



## 5. Conclusions

Canberra's commercial centres are the sites of distinctive and widely patronised NTE venues. Such venues add greatly to the liveability of the city 'after dark' and, as elsewhere, are sites where play, socialisation and encounter take place.

The NTE is also an important dimension of the broader ACT economy. NTE-orientated businesses create significant economy activity and tax revenues and provide employment to many Canberrans. In many senses, the NTE is a 'cultural economy', with its production and consumption being linked with cultural practices that reflect our values and tastes, such as though the performance of live music or the screening of films.

This paper has recognised that the night time and differing expectations around public space and behaviours can lead to tensions. However, it is firmly believed that planning, in partnership with the community, businesses and the activities of other relevant government agencies, can largely overcome the potential for conflict between, for example, younger and older people, or between the live music sector and inner city residents seeking acoustic privacy. The city's commercial centres can be both dynamic and safe places to work, live and relax from dusk until dawn.



Taxi rank, Civic

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