The Sunshine Coast Night-Time Economy

8.00PM Lights out? The impacts of a sparrow culture, generational differences and urbanisation amidst challenging economic times.

UniSC

Acknowledgments

University of the Sunshine Coast (UniSC) acknowledges the Traditional Custodians of the land on which we live and work and recognises their continuing connection to land, water and community.

We wish to acknowledge the Kabi Kabi and Jinibara peoples of the coastal plains and hinterlands of the Sunshine Coast. First Nations people are the original storytellers and artists of these lands and we honour the rich cultural contributions that First Nations people bring to our Region.

We wish to pay respect to their Elders – past, present and emerging, and acknowledge the important role First Nations peoples continue to play within the Sunshine Coast community. Together, we are all stronger.

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and contributors to the development of this whitepaper:

Sunshine Coast Events Industry Association (SCEIA)

Sunshine Coast Music Industry Collective (SCMIC)

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Introduction

This white paper has been prepared by a research team from the School of Business and Creative Industries (SBCI) of the University of the Sunshine Coast (UniSC). The paper presents findings from the Building Sustainable Night-time Economies in Regional Australia research project.

The project was primarily funded under the UniSC Launch Program and augmented by additional funding from Sunshine Coast Council (SCC). In-kind support was provided by Caloundra Chamber of Commerce (CCC), Qmusic and APRA-AMCOS.

The research focused on the Sunshine Coast region's night-time economy (SCNTE) and comprised a series of in-depth interviews with local industry practitioners, followed by surveys of Sunshine Coast residents (n=577) and visitors to the region (n=298).

The research findings indicate the SCNTE is changing in ways that require careful consideration and additional research. While some components are declining, others are stable and in recent years, while some venues and events have closed others have proved resilient. To help understand these transformations, a range of local infrastructural, cultural and psycho-social elements were isolated for in-depth investigation. Various barriers and enablers, such as steep cost of living increases post-Covid, and provision or lack of provision of transport were investigated to get a sense of 'what's going on' with the SCNTE.

Based on the research findings, a 'placemaking strategy' comprising seven elements is presented for consideration. The strategy aims to bolster the SCNTE and address a perceived 'lack of vibe' that might be detracting from the Sunshine Coast's overall appeal as a destination to live, invest in or visit.

The seven elements of the placemaking strategy are:

1. Investigate the viability and scalability of 'village hub' development - adapt examples such as Noosa Junction and Nambour whereby local business collectives, commercial property owners and lessees are empowered to collectively activate hospitality and entertainment-based precincts across the string of smaller villages and larger business districts that make up the Sunshine Coast.

2. Explore extending and expanding boutique festivals and event - The Sunshine Coast's plethora of community parks, rural spaces and places in pristine natural settings make for special and attractive event locations. This combined with a burgeoning craft brewing and distilling industry, artisanal food, and longstanding agricultural networks, means the Sunshine Coast is well placed to take advantage of the emerging market gap created by the decline of larger festivals. The opportunity calls for the development and hosting of smaller boutique-style 'camp and play' festivals which are blends of music, artisanal cuisine, special interests and creative well-being entertainment.

3. Explore multi-use industrial Spaces - A novel opportunity exists to reconceptualise industrial spaces as occasional or permanent entertainment spaces. Where appropriate, commercial venues could be retrofitted for music and other cultural practices/ performances, as well as feature as part of the establishment of smaller hospitality and entertainment venues such as micro-breweries and cafes. The use of such industrial spaces as hospitality and performance venues offers a key advantage in that their proximity greatly reduces the potential for residential noise impact.

4. Pilot village hub public transport circuits - A lack of safe, affordable, reliable public transport that services local villages constrains the SCNTE with 86.5% of respondents to our large survey choosing personal vehicles out of convenience as their predominant form of transport. A recommendation to be explored is to review current bus routes and services with a focus on providing new services that align with the piloted village hubs during peak night-time economy (NTE) operational times.

5. Review entertainment permitting and noise complaint policies and procedures - While the rights of communities should be protected when it comes to excessive noise, the current policies and procedures for live entertainment permitting and noise complaint enforcement are ambiguous, not fit for purpose and often disadvantageous to fostering the SCNTE.

6. A centralised 2,000 capacity performance venue - Currently the Sunshine Coast lacks larger pub rock-style venues to host national touring bands. As the Sunshine Coast is slated for substantial population growth over the next 5-10 years, the establishment of a dedicated mid-sized performance space as part of the Maroochydore CBD cultural precinct development could be catalytic to growing and expanding the SCNTE.

7. Placemaking marketing and communications - Part of creating positive and engaging 'vibes' is putting in place both top-down and bottom-up marketing strategies to stimulate the latent demand that has been identified through both our resident and visitor facing research. From interactive gig guides, 'how-to' marketing kits, strategic communication training and sector-wide, LGA-lead media-buying to bespoke social media-centric branding initiatives can both aspire to and bring into a being a more knitted together patchwork of 'happenings' that, if not every day and night of the week, at least more often, revitalise the SCNTE perceptions.

This whitepaper provides evidence-based insight into the SCNTE upon which these strategic placemaking recommendations are based. The data generated from the research project is extensive and not all results are reported here. Additional research is planned and there is potential for deeper statistical analysis of the data. Should readers have questions or observations about any particular element of this report, or desire further investigation of the data to assist with their own operations, they are encouraged to contact the UniSC research team.

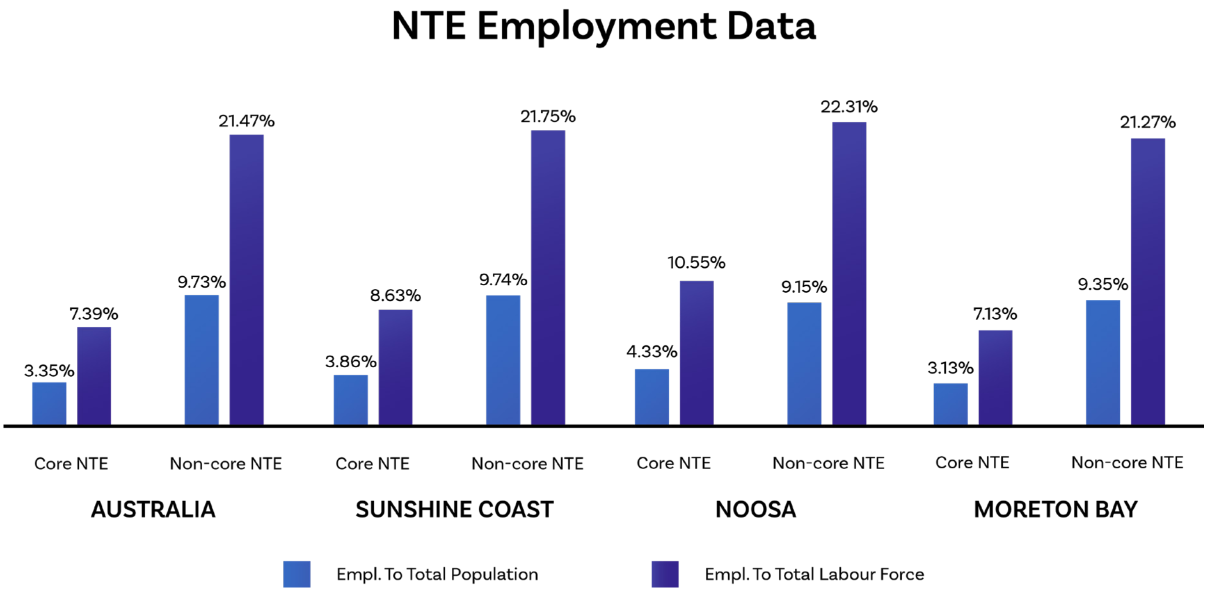
What is a night-time economy and why is it important for the Sunshine Coast?

Night-time economies in Australia encompass economic activity which occurs at establishments primarily between the hours of 6pm and 6am. These services can be broken down into **Core** (providing primary establishment services such as food, drink and entertainment to leisure users), **Non-Core** (providing integral services such as transport and security to core leisure activities) and Supply (part of the Core supply chain via the production or wholesaling of food, drink or entertainment products for resale in leisure outlets) (Ingenium, 2021).

It should also be noted that many hospitality businesses that operate in a night-time economy also operate outside of the 6pm-6am timeline. For example, many Sunshine Coast cafes also open for breakfast, and hotels and microbreweries offer lunch and afternoon "sessions". Hence, when referring to the SCNTE in this research we also include consideration of the hospitality and entertainment venues that operate outside of the typical night-time timeline, which play a key role in employment.

The graph in Figure 1 provides a comparison between the percentage of employment within Core and Non-Core NTE sectors across the Sunshine Coast region and national employment data (ABS, 2021). This data reflects the above national average of jobs the NTE provides across the Sunshine Coast region. Additionally, recent business reports have indicated that a vibrant night-time economy is vital to attracting and/or retaining inward investment and skills to a region and thus impacts the workforce across a broad range of industries (Sunshine Coast Council, 2023; Mulcahy et al., 2023).

Figure 1: Night-time economy employment on the Sunshine Coast



What has been happening for the Sunshine Coast scene?

This research was spurred by anecdotal industry reports and media commentary indicating that the SCNTE was in decline. Even prior to the COVID pandemic, and especially through and after the severe disruptions to the industry's business models across the arc of the pandemic, this decline was negatively impacting the broader economic and lifestyle attractiveness of the region (Ingenium, 2021; Khalil, 2022; Langford, 2021; Sinclair, 2023). The following observations provide context for the research.

1. Venue Closures

As 2022 ended, two prominent live music venues on the Sunshine Coast ceased operations. They cited poor event attendance following on from COVID-19 lockdowns and increased operating costs. Furthermore, reports indicating a lack of consumer confidence in attending entertainment venues and events were also considered contributing factors (Sinclair, 2022).

A key way to validate the scope of live entertainment across the region and to access trends within the sector over time (and compare to other regions) is to view the Live Performance Reports (LPRs) submitted from the region to APRA AMCOS. In 2022, there were 4,591 LPRs submitted from the Sunshine Coast and Moreton Bay regions. Completing LPRs is not compulsory. Significant cultural value is placed on original live music, which is most often reported, while performers who play non-original music have less incentive to report the data. Despite these limitations, the data still provide a relevant quantitative indication of the annual volume of live performances. The data indicate there has been a slow return to pre-COVID volumes of live performances based on the number of LPRs submitted to APRA AMCOS from the Sunshine Coast and Moreton Bay regions over the past five years (Table 1), but also suggest deeper structural shifts might be taking place.

What are LPRs?
For musicians to claim performance royalties for their music (or the music of others), individual artists and bands are expected to enter details relating to their performances (e.g., name, date, venue, suburb) into an APRA AMCOS data portal.

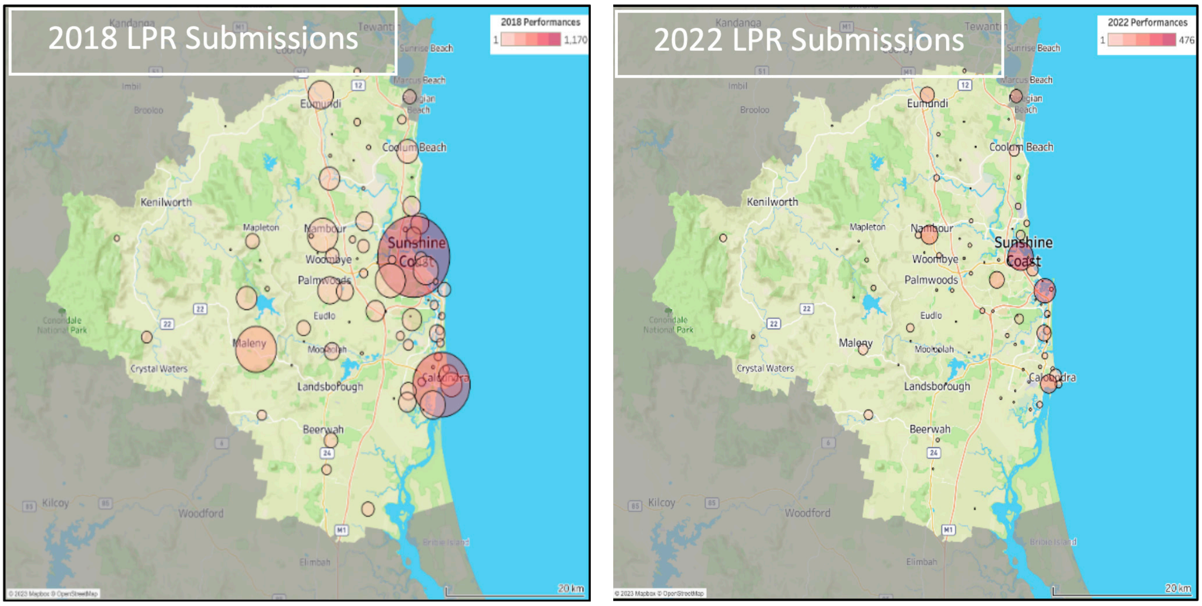
Table 1: LPR submissions 2018-2023

Region	2018	2019	2020	2021	2022	2023*	Grand Total
Moreton Bay	3,143	2,495	800	1,738	1,698	852	10,726
Sunshine Coast	5,232	4,050	2,311	3,497	2,893	1,752	19,735
Total	**8,375**	**6,545**	**3,111**	**5,235**	**4,591**	**2,604**	**30,461**

**2023 totals were year to date as at June 30*

Another method of reporting the impact of Covid on businesses operating in the SCNTE was to view the LPRs in cluster maps derived from the Sunshine Coast venues the LPRs were submitted for (Figure 2). The maps highlight a decline in the number of venues providing live performances leading to a reduction in the availability of entertainment options in local precincts.

Figure 2: LPR Cluster Maps 2018 and 2022



2. Festival Cancellations

In addition to the closure of dedicated music and entertainment venues, three major festivals in the region have paused (Grooving the Moo (2024), a 35,000-capacity event and Jungle Love (2023), an ongoing 5,000-capacity event), or ceased operation (Big Pineapple Festival (2021), an ongoing 10,000-capacity event). The latter had a significant impact in 2021, as the Big Pineapple Festival was national radio station, Triple J's, only sponsored event in the region. This led to calls for local authorities and the broader creative community on the Sunshine Coast to think more regionally and work more collaboratively to create a vibrant night-time economy and to find ways that will allow live music to recover from the pandemic's impact on the sector (Sinclair, 2023). Additionally, recent business reports indicated that a robust night-time economy is vital to attracting and/or retaining inward investment and skills to a region. This impacts the workforce across a broad range of industries (Sunshine Coast Council, 2023; Mulcahy et al., 2023).

3. Current Attendance Observations

Furthermore, there are conflicting anecdotal accounts of attendance numbers for live entertainment. For example, the Caloundra Events Centre is currently enjoying strong attendance levels, and on the back of the Uncover Caloundra marketing campaign in late 2023, the King's Beach Tavern reported very sound trading figures over the Christmas period. Yet, the Sunshine Coast Comedy Festival, held in November 2022, didn't meet projected attendance levels despite an extensive marketing campaign and well-prepared event strategy.

Despite continued population growth in the Sunshine Coast region (Sunshine Coast Regional Council, 2023; KPMG, 2017), the live entertainment industry is perceived to be fragile and even in decline (Sinclair, 2023). As such, these challenges might be related to local contextual factors. These had yet to be reliably documented, and we had, at best, only mostly descriptive explanations. That is, there had been little systematic analysis of root causes and potential compounding factors that form the basis for understanding what stresses and challenges this sector of the economy faces in these regions. Hence the need for this current research project and extensions beyond this project.

What is our industry saying?

In early 2023, the research team conducted 10 interviews with local industry practitioners. The interviewees were purposefully selected from the research team's existing networks and represented performing artists, venue operators, and music industry administrators.

The foci of the interview discussions were on the respondents' perceptions and/or experience of the SCNTE, particularly in comparison to their experience of other places, the impacts of the COVID pandemic and their observations of what barriers or constraints may exist within the SCNTE.

Through systematic analysis of the interview responses, nine key themes emerged as identified below*. These themes were then investigated through surveys of residents and visitors to the Sunshine Coast.

Of the nine identified themes, four related to perceptions of the SCNTE while five related to barriers or constraints for the industry.

Note: A full report of the industry interviews* *"Check 1, 2…"*** *is available on request through UniSC*

Industry Perceptions of SCNTE

1. ***The covid factor:*** The lockdowns affected consumer behaviour and post-pandemic business.

2. ***A lack of vibe:*** Limited entertainment opportunities on the Sunshine Coast and venues close too early ("8.00pm lights out").

3. ***Sunshine Coast culture:*** Perceptions of an early to bed, early to rise (sparrow) culture amongst locals.

4. ***Zoomer culture:*** Generation Z values and behaviours appear to differ from previous generations.

Barriers or Constraints to the SCNTE

5. ***The cost of living:*** Rising inflation impacts the overall cost of doing business as well as consumer spending habits.

6. ***Transport:*** Lack of reliable and efficient public transport is a major constraint.

7. ***Safety:*** Although not highlighted as a prominent issue, remains a consideration given the lack of public transport.

8. ***Community permissions:*** Noise complaints and the complexities for operators of permits and compliance.

9. ***Venues:*** A disconnected array of venues with significant capacity gaps and no clear pathway for fostering emerging artists.

What are our residents and visitors saying?

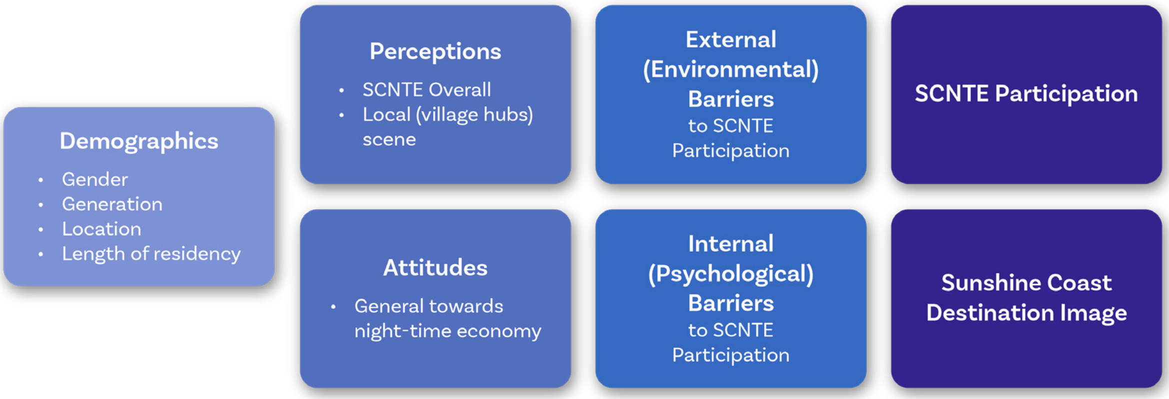
For robust analysis of the current state of the night-time economy and thorough consideration of those who engage with it, the current research considered two separate samples, residents and visitors. This allows for a nuanced understanding of the night-time economy by capturing perspectives from residents who are part of the community fabric and visitors who contribute to its dynamics. By examining these two groups separately, we can identify unique patterns, preferences, and concerns that may influence the overall functioning of the night-time economy.

Two online surveys were conducted in January of 2024. A resident survey received 577 qualified responses. The responses were sourced through an online research panel provider and augmented by a social media campaign to promote participation in the survey. The visitor survey received 298 qualified responses, all supplied by the online research panel provider. The visitor sample mostly comprised respondents within the 'drive' market for the Sunshine Coast of Southeast Queensland.

Survey Design

The research model in Figure 3 shows that the surveys were designed to capture anonymous demographical information, followed by perceptions of SCNTE and general attitudes towards NTE. The hypothesised external (environmental) and internal (psychological) barriers were tested, along with levels of participation in the SCNTE and its impact on the destination image of the Sunshine Coast.

Figure 3: Survey Design



Who was in our samples?

Residents

The resident survey (n=577) was considered representative with the age, gender and household profile of the sample closely representing that of the Sunshine Coast population. Respondents were required to be over 18 years of age and living in a postcode within the designated Sunshine Coast region to partake in the research. Age cohorts were evenly distributed across four generations, enabling valid comparisons of responses between them. This was particularly valuable considering speculation that night-time economy behaviours vary significantly across different age generations.

Age	n	%
Baby Boomers (60-60+ yrs)	154	26.7
Gen X (43-59 yrs)	106	18.4
Gen Y (30-42 yrs)	175	30.3
Gen Z (18-29 yrs)	142	24.6

Gender	n	%
Male	194	33.6
Female	379	65.7
Non-binary	3	0.5
Prefer not to say	1	0.2

Households	n	%
Single	187	32.5
Single parent (children at home)	31	5.4
Couple (children at home)	118	20.5
Couple (no children at home)	175	30.4
Group/shared household	22	3.8
Live at home with parent/s	34	5.9
Other	9	1.6

Length of residence	n	%
21 years or more	172	29.9
11-20 years	126	21.9
6-10 years	100	17.4
Less than 5 years	177	30.8

Visitors

For participation in the visitor survey (n=298), respondents needed to be 18 years of age or older and have visited the Sunshine Coast within the last 24 months. Like the resident survey, age cohorts across four generations were relatively even in distribution, and 99% were from SE Qld.

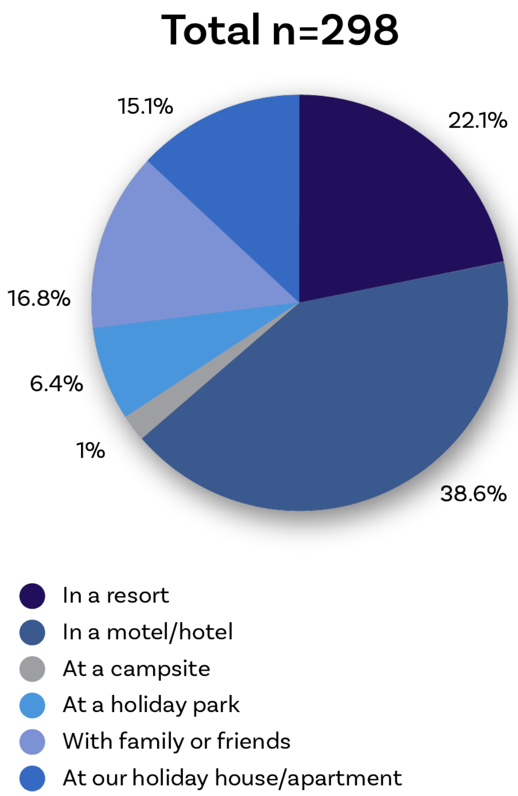
Age	n	%
Baby Boomers (60-60+ yrs)	83	27.8
Gen X (43-59 yrs)	78	26.2
Gen Y (30-42 yrs)	87	29.2
Gen Z (18-29 yrs)	50	16.8

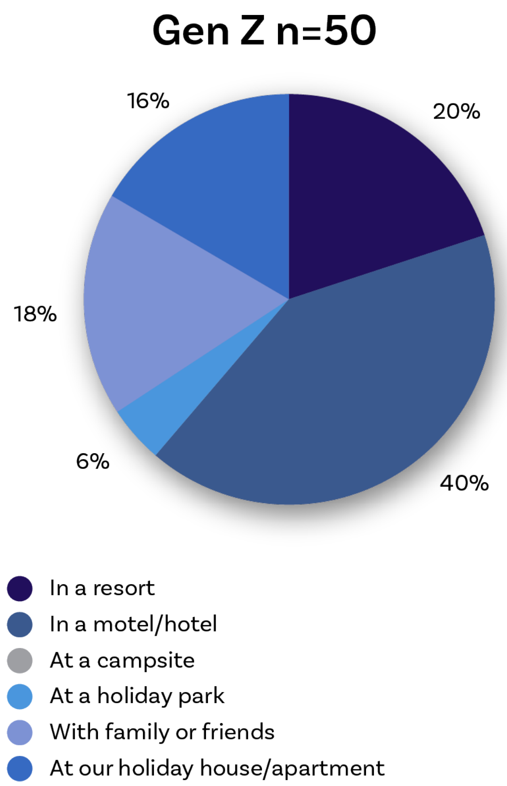
Households	n	%
Single	67	22.5
Single parent (children at home)	20	6.7
Couple (children at home)	87	26.2
Couple (no children at home)	97	32.6
Group/shared household	12	4.7
Live at home with parent/s	15	5.0
Other	7	2.3
Prefer not to say	2	0.7

Gender	n	%
Male	118	39.6
Female	178	59.7
Non-binary	1	0.3
Prefer not to say	1	0.3

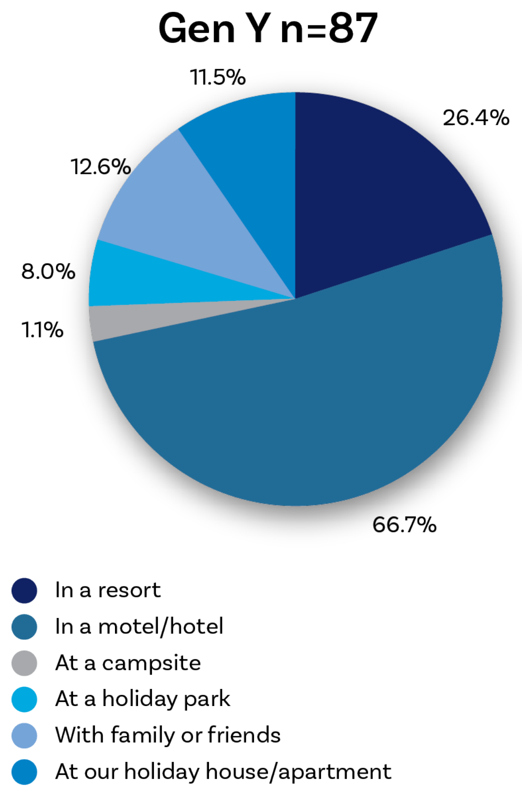
Visitation	Gen Z	Gen Y	Gen X	BBs
Number of visits to the Sunshine Coast in the last 24 months (means)	4.40	3.92	4.05	3.40
Average number of nights stayed during a visit (means)	4.84	4.27	3.77	4.38

Where do they usually stay when visiting the Sunshine Coast?

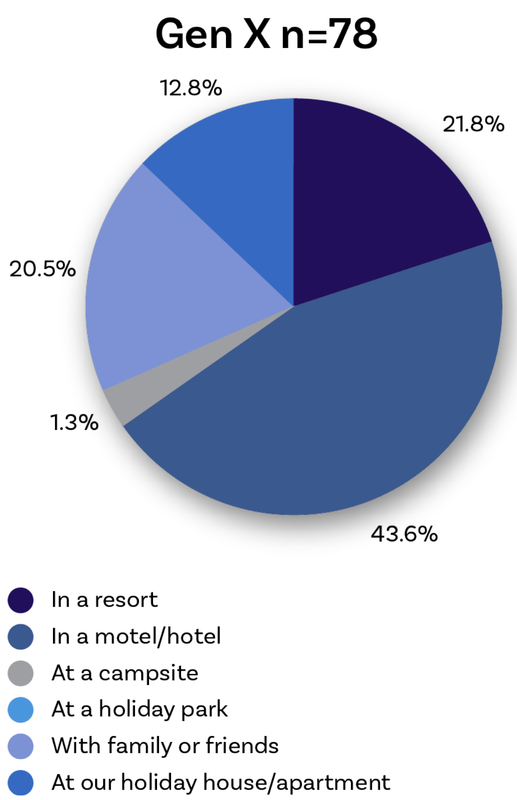




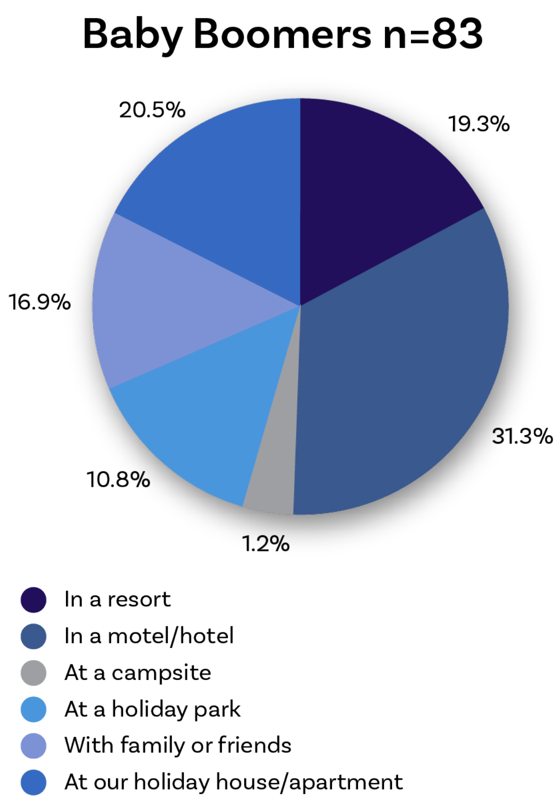
Gen Z n=50
20%
40%
6%
18%
16%
In a resort
In a motel/hotel
At a campsite
At a holiday park
With family or friends
At our holiday house/apartment



Gen Y n=87
11.5%
26.4%
12.6%
8.0%
1.1%
66.7%
In a resort
In a motel/hotel
At a campsite
At a holiday park
With family or friends
At our holiday house/apartment



Gen X n=78
12.8%
21.8%
20.5%
1.3%
43.6%
In a resort
In a motel/hotel
At a campsite
At a holiday park
With family or friends
At our holiday house/apartment



Baby Boomers n=83
20.5%
19.3%
16.9%
31.3%
10.8%
1.2%
In a resort
In a motel/hotel
At a campsite
At a holiday park
With family or friends
At our holiday house/apartment

Notable insights and some busted myths - Key survey findings

How much participation is there in the Sunshine Coast Night-time Economy?

Respondents were asked to indicate how regularly they would participate in the night-time economy on a monthly basis. A scale of 1-5 was used (for residents, 1= never & 5 = regularly or more than once a month and for visitors 1=never & 5=every day or night of a visit). Table 2 shows the means of responses by generational cohort.

> The data shows visitors are participating *less* than residents in SCNTE activities.

Across all categories and age cohorts, the data shows visitors are participating less than residents in SCNTE activities. A comparison of responses to decision factors for participation indicates they have a stronger influence on visitors than residents. This has implications for considering how the SCNTE is perceived and marketed to visitors, which is discussed in more detail further on in the whitepaper.

Table 2: Residents and Visitors participation in night-time economy activities

Activity	Gen Z		Gen Y		Gen X		BB's		Total	
	Res	Vis	Res	Vis	Res	Vis	Res	Vis	Res	Vis
Socialise in a home setting	4.26	2.94	4.08	2.57	4.00	2.40	3.90	2.33	4.06	2.52
Eat out at a restaurant	4.03	3.24	4.14	3.11	4.04	3.19	3.71	2.92	3.98	3.10
Free live entertainment (e.g bar, café)	3.60	2.38	3.50	2.23	3.24	2.09	2.50	1.82	3.22	2.10
Go to a cinema	3.61	1.88	3.43	1.71	3.12	1.50	2.23	1.25	3.10	1.56
Visit night markets	3.37	2.40	3.45	2.21	2.87	1.94	2.13	1.64	2.98	2.01
Afternoon session (e.g micro brewery)	3.44	2.14	3.48	2.02	2.92	1.91	1.94	1.59	2.97	1.89
Ticketed live music concert	3.17	1.56	3.19	1.66	2.72	1.40	1.95	1.19	2.78	1.44
Cultural performance (e.g dance)	2.91	1.64	3.03	1.57	2.41	1.49	1.93	1.20	2.60	1.46
Go to a nightclub	3.22	1.80	2.75	1.56	1.84	1.39	1.25	1.07	2.31	1.42

Not surprisingly, for residents, socialising in a home setting attracted the highest participation rates. This reflects anecdotal comments that home entertainment is easier and cheaper to engage in, particularly for those residents living in more rural areas of the region. Accordingly, socialising in home settings should be viewed as a substitute product and indirect competition to experiences in the SCNTE.

This finding also highlights the importance of understanding the barriers and constraints both residents and visitors alike face in participating in the SCNTE. Further to this point, when asked about decision factors for participation in SCNTE, residents tended to disagree with the statement, "I actually prefer to just go to private parties or hang out with friends at someone's place" (m=2.78/5). This shows a preference to attend SCNTE but constraints like distance and cost impact actual behaviour, which are explored further in discussing consumer motivations for participation in SCNTE.

Considering the trends within the data, the following key takeaways were observed:

- Restaurant dining is the most popular 'going out' activity across all cohorts for visitors and residents alike
- Local village-style venues (e.g. bars, cafes, micro-breweries, cinemas and markets, etc.) feature most prominently
- Gen Z & Y are generally more active in terms of NTE
- Activities with ticketed or entrance fees are the least patronised (except for the cinema)

We acknowledge that our data doesn't distinguish between venues that are dining only and those that may serve food and have live entertainment. Therefore some respondents when selecting "eat out at a restaurant" may also be experiencing live entertainment yet their primary motivation for participating in the NTE was meal-related.

Is the Covid factor hanging around?

The live entertainment, events and hospitality sectors were some of the most immediately affected and drastically impacted by enforced lockdowns of the COVID-19 pandemic period. Nationally, the live music sector saw a more than 90% reduction in its overall value during the period (Ward et al., 2022). Coming out of these lockdown periods and restrictions, there were questions as to how and if NTEs could recover, and if related consumer behaviour changes were temporary or permanent. According to Ingenium (2021), the general recovery for Australian Core NTE establishments during 2020/21 was remarkably positive, with an 8.4% increase in new establishments (123,316) and a 4.4% increase ($133.2bn) in overall sales turnover from 2019/20 figures.

As reported in our Check 1,2… report, our industry interviews indicated pent-up consumer demand for live events. Paradoxically, there were also pent-up demands for performers to “get back on stage”. This led to increased competition within the market. While the desire to experience events and attend hospitality and live entertainment venues initially bounced back quickly, concerns were raised that people still appeared to be more cautious in choosing where and when they may participate in such activities. Event ticket pre-sales have been substantially lower in the post-COVID period, increasing thecommercial risks for a venue or promoter staging an event as evidenced by the many recent festival closures across Australia.

In contrast, our resident and visitor surveys indicated that impacts from the COVID lockdowns were dissapating in their purchase and participation behaviours. Respondents in both surveys were less inclined to agree that booking cancellations or refund guarantees (m = 2.57/5) or going out amongst busy settings (m = 2.39/5) were decision-making factors than anticipated. They only indicated mid-range agreement that how packed the venue is likely to be (m = 3.15/5) affected their decisions. Therefore it is more likely that cost of living pressures and other factors are contributing to lower event ticket sales.

Does the Sunshine Coast have a lack of vibe?

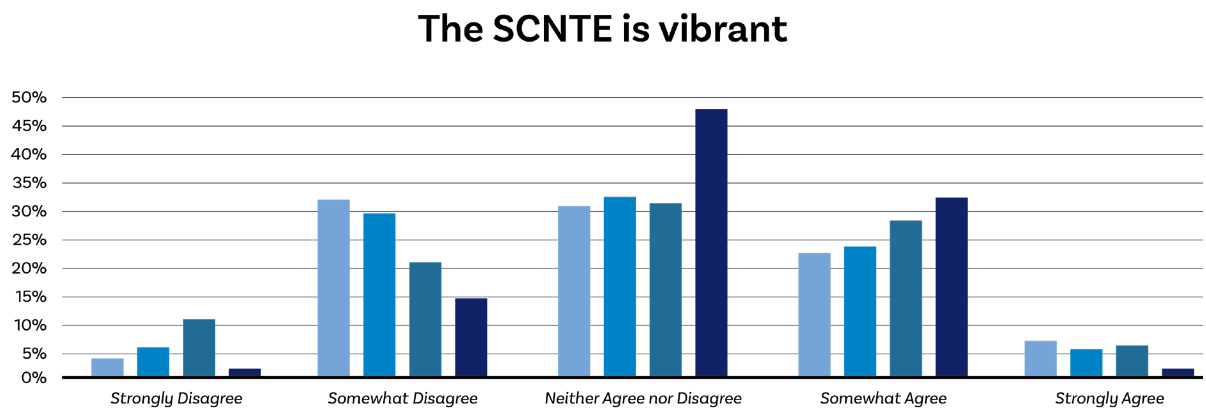
A prevailing perception that the SCNTE was lacking in quantity, quality and diversity of offerings has appeared in media commentary and was noted in our industry feedback – with some industry interviewees describing "a distinct lack of vibe".

Our data shows that resident perceptions of the SCNTE are mixed. That is when looking at the mean results of the 1-5 scale, perceptions don't appear to be overly positive or negative. For example, perceptions that SCNTE is "*vibrant*" (m = 3.02/5) or "*diverse*" (m = 3.06/5) were only slightly agreed with. Similarly, the perceptions that SCNTE "*suits my needs*" (m = 3.04/5) and that SCNTE "*quality is really good*" (m = 3.06/5) had close to neutral means. Alternatively, that SCNTE is "*dull*", whilst a measure of negativity, was also only slightly agreed with (m = 3.15/5).

While there were no significant statistical variations in these perceptions between generations, a closer analysis of the distribution of responses (the standard deviation along the 1-5 scale) for each perception within each generation provides more useful insights.

The standard deviation results for "*vibrant*", "*quality is really good*" and "*suits my needs*" were all predominantly above 1.00 which, when using a 5-point scale, suggests an inconsistency in opinions. These results are depicted in histogram graphs in Figure 4. Taking this analysis a step further we can compute an apparent net promotor score from these results, that is to exclude the neutral responses and deduct the disagreement responses from the agreement responses as shown in Figure 5.

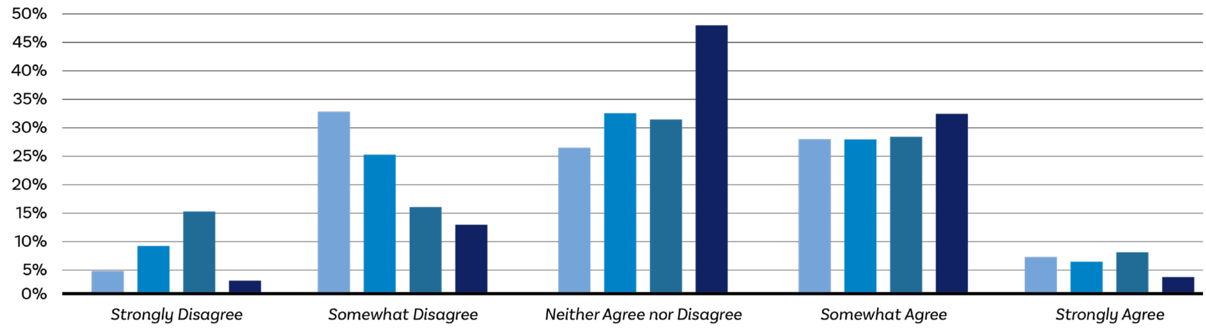
Figure 4: Histogram graphs for resident perceptions of SCNTE



	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
Gen Z	4.2%	33.1%	31.0%	23.9%	7.7%
Gen Y	6.9%	29.7%	33.1%	24.0%	6.3%
Gen X	11.3%	21.7%	32.1%	28.3%	6.6%
BB's	2.6%	14.9%	47.4%	32.5%	2.6%

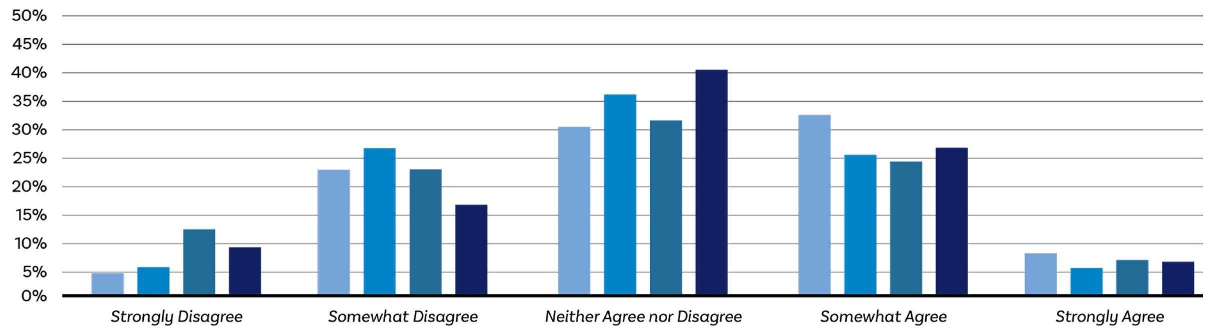
Figure 4 continued: Histogram graphs for resident perceptions of SCNTE

The SCNTE quality is really good



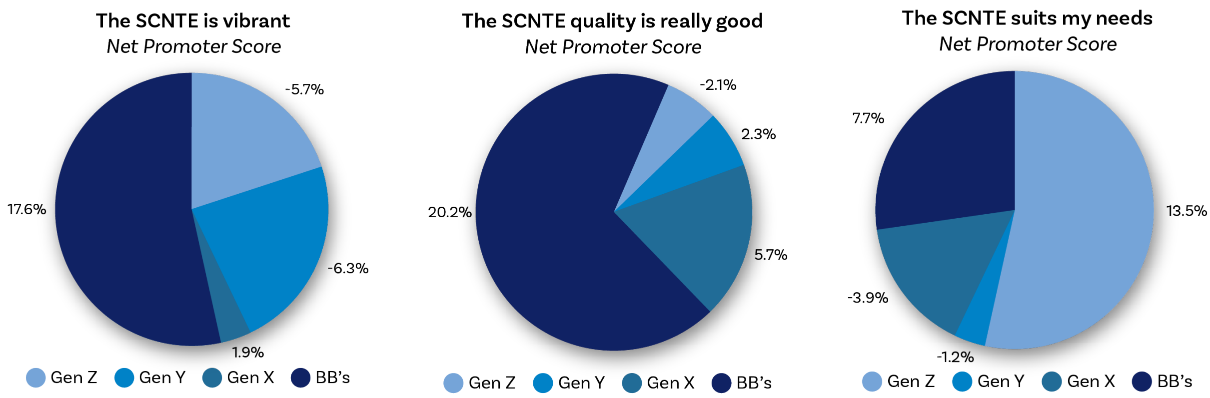
	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
Gen Z	4.9%	33.1%	26.1%	28.2%	7.7%
Gen Y	8.0%	25.1%	31.4%	28.0%	7.4%
Gen X	15.1%	16.0%	32.1%	28.3%	8.5%
BB's	3.2%	13.0%	47.4%	32.5%	3.9%

The SCNTE suits my needs



	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
Gen Z	4.9%	23.2%	30.3%	33.1%	8.5%
Gen Y	5.7%	26.9%	36.0%	25.7%	5.7%
Gen X	12.3%	23.6%	32.1%	24.5%	7.5%
BB's	9.1%	16.9%	40.3%	26.6%	7.1%

Figure 5: Net Promoter results for resident perceptions of SCNTE



These results indicate that among younger generations at least around one-third of residents have negative perceptions about the SCNTE. Yet paradoxically, Gen Z are more likely to feel the SCNTE suits their needs.

Residents were also asked to consider the same questions concerning the night-time economy in their local area (within a 10km radius of their home). Across all related questions, there was less agreement with suiting my needs (m = 2.89/5) and the quality, diversity, and vibrancy of local night-time economies. There was also more divergence in responses between and within age groups which potentially resulted from the geographical distribution of our sample reflecting variances in the availability and or quality of local village NTEs.

Whilst the data indicate that there is a level of ambivalence to perceptions of vibe for the SCNTE there are some positive conclusions to be drawn around opportunity. The strongest agreement observed in the resident survey clustered around the perceived value of and potential for the SCNTE: *"It is important to have NTE on the Sunshine Coast"* (m = 3.97), with Generation X very strong in agreeing (m = 4.37/5) and *"There should be more opportunities for NTE on the Sunshine Coast"* (m = 3.74/5). Again, Generation X was most supportive of this statement (m = 4.15/5). When asked to consider these questions concerning NTE in their local areas, the responses were similarly positive.

The strongest agreement observed in the resident survey clustered around the perceived value of and potential for the SCNTE.

Additionally, there was strong agreement that *the quality and variety of cafes and restaurants across the Sunshine Coast is good* (m = 3.65/5) across all generational cohorts. Resident Baby Boomers agreed most strongly (m = 3.90/5) and visitors across all generational cohorts agreed slightly more with this statement than residents.

To explore destination image and branding, attachment levels to the Sunshine Coast as a destination to live or holiday in based on its NTE were measured. The data showed a strong sense of identification as a Sunshine Coast resident (m = 3.63/5) with no statistically significant difference across the generational cohorts, although Gen Z had the strongest attachment (m = 3.86/5). However, in comparing the SCNTE to that of other places visited or lived, Table 3 shows that our residents held somewhat negative responses, whereas the visitors were slightly more positive.

Table 3: Perceptions of SCNTE in comparison to other places lived or visited

	Gen Z		Gen Y		Gen X		BB's		Total	
	Res	**Vis**	**Res**	**Vis**	**Res**	**Vis**	**Res**	**Vis**	**Res**	**Vis**
Night-time entertainment on the Sunshine Coast is better than other similar places I have visited	2.56	3.08	2.59	3.17	2.55	3.06	2.61	2.96	2.58	3.07
Night-time entertainment on the Sunshine Coast is better than other similar places I have lived	2.64	2.96	2.79	2.93	2.54	3.08	2.71	2.82	2.68	2.95

The data then indicates somewhat mixed results whereby the quality of cafes and restaurants is positively viewed while the perception that there is "less vibe" in comparison to other places is moderately supported. Yet the responses suggest a latent demand for more NTE opportunities.

The responses suggest a latent demand for more NTE opportunities.

Is the SCNTE an important factor in attracting and/or retaining residents and visitors?

Understanding how the SCNTE factors into attracting and retaining a workforce and increasing tourist visitation is important. The results from our resident survey show strong support for the statements that "*Having good night-time entertainment on the Sunshine Coast is important for attracting tourists*" (m = 3.86/5), "*keeping workers here*" (m = 3.73/5), and "*attracting people to move and live here*" (m = 3.53/5), with no statistically significant differences between generational cohorts.

Notably, there was a tendency to disagree with the statement "*I often consider leaving the Sunshine Coast to live somewhere else where there is better night-time entertainment*" (m = 2.25/5). However, there was a difference between Gen Z (m = 2.84/5) and Baby Boomers (m = 1.61/5). Findings indicate that Baby Boomers feel more settled and attached to their lives on the Sunshine Coast. While not the primary focus of this research, this result indicates that the NTE is not a prominent factor in decisions by young people to relocate (more likely it is their career, but further research would be required to confirm this), yet it is still an aspect of consideration.

From the visitor survey, we also find mixed results, as shown in Table 4. While visitors like to tell others they are visiting the Sunshine Coast and recommend it for visits, there is less agreement with wanting to move here. When asked to provide open responses for why this is the case, the most cited responses related to 1) current work and family commitments, 2) cost of housing, 3) traffic and, 4) lack of employment options as impediments. Therefore, the NTE is not currently a high ranking factor of attraction for relocation.

Table 4: Visitors consideration of the Sunshine Coast

	Gen Z	Gen Y	Gen X	BB's	Total
I like to tell people I am visiting the Sunshine Coast	3.48	3.62	3.58	3.01	2.42
I often consider moving to the Sunshine Coast to live and work	2.98	2.90	2.86	2.31	2.74
Night-time entertainment on the Sunshine Coast would be an important factor in my decision to move there	3.00	2.99	2.74	2.02	2.66
Based on the night-time entertainment that is available on the Sunshine Coast I would recommend others to visit there	3.42	3.23	3.38	3.07	3.26

In summary, our results show moderate support for the perception that there is a lack of vibe related to the SCNTE. To a certain degree, it appears there is a level of acceptance, or perhaps resignation, in terms of how things are. It is reasonably clear that SCNTE is not currently a significant factor in attracting and retaining residents and visitors. Importantly, however, this does leave the Sunshine Coast vulnerable. Alongside external factors like the cost of housing, lack of employment, or traffic congestion as hindrances toward relocating, a 'lack of vibe' may act as the final tipping point toward keeping new residents away. Therefore, the apparent latent demand for more diversity, variety and opportunity to participate in the SCNTE should be viewed with interest by operators and the government.

Is the lack of vibe a Sunshine Coast cultural phenomenon?

A common narrative in media, the community, and our industry interviews is that "everything closes too early on the Sunshine Coast"—that is, "8.00pm and it's lights out!"

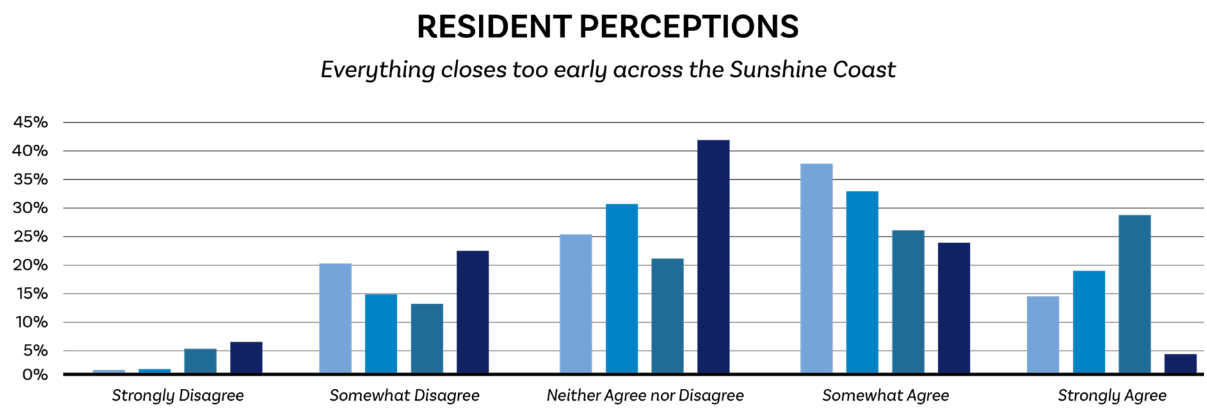
There was evidence of support for this sentiment amongst residents and visitors alike (Table 5), with the younger generations having the strongest agreement. The responses by both residents and visitors were quite similar with visitors only slightly less likely to disagree and there was a statistically significant difference in the Baby Boomers' result (less likely to agree) in comparison to all the younger generations for both residents and visitors alike.

Table 5: Resident and visitor mean responses (1-5) to "everything closes too early across the Sunshine Coast"

Activity	Gen Z		Gen Y		Gen X		BB's		Total	
	Res	**Vis**	**Res**	**Vis**	**Res**	**Vis**	**Res**	**Vis**	**Res**	**Vis**
Everything closes too early at night across the Sunshine Coast	3.44	3.48	3.53	3.44	3.63	3.47	2.96	2.76	3.38	3.29

The standard deviation results for this question were all predominantly above 1.00 amongst the younger generations' responses which suggests some inconsistency in opinions. The resident survey results are depicted in a histogram graph in Figure 6. By excluding the neutral responses and deducting the disagreement responses from the agreement responses (Figure 6) we can see there is a high percentage skew amongst Generations Z, Y and X towards agreement with the sentiment that everything closes too early across the Sunshine Coast.

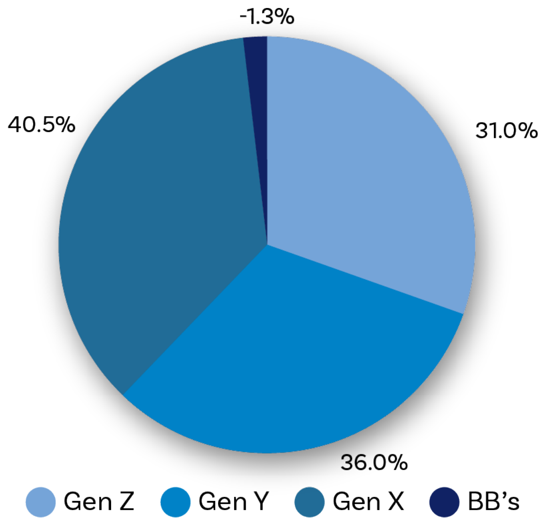
Figure 6: Histogram and net promoter score for resident perceptions of SCNTE closing times



	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
Gen Z	1.4%	20.4%	25.4%	38.0%	14.8%
Gen Y	1.7%	14.9%	30.9%	33.7%	18.9%
Gen X	5.7%	13.2%	21.7%	31.1%	28.3%
BB's	7.1%	22.7%	41.6%	24.0%	4.5%

RESIDENT PERCEPTIONS

Everything closes too early across the Sunshine Coast



This raises something of a chicken and egg paradox. Have residents, and to a lesser degree visitors, become conditioned to expect that most venues on the Sunshine Coast (mainly restaurants) close by 8.00pm? Or does everything close too early because of a lack of demand?

Our findings suggest there is not a lack of demand, particularly when also considering the sentiment that residents and visitors believe there should be more SCNTE.

The closing too early situation perplexes interstate migrants and visitors, with potential impacts on the destination brand. There has been some suggestion that it appears to be the result of a peculiar cultural trait for the Sunshine Coast as discussed next.

Does the Sunshine Coast have a sparrow culture?

One common explanation for the "8.00pm lights out" sentiment is that residents and visitors (and sometimes venue operators) are more interested in engaging in early morning activities associated with the region's natural assets than having late nights out. This has been termed an "early to bed, early to rise" or "sparrow-like" culture on the Sunshine Coast.

So, we tested this in our surveys with some interesting results. Table 6 shows responses amongst residents across the generational cohorts for alternate activities that may factor into the decision-making process for engaging in SCNTE (Scale 1 = strongly disagree – 5 = strongly agree).

Not surprisingly, there was a variance between Gen Z and Gen Y to Baby Boomer responses regarding being too busy with work, study, or other things to go out much at night. Yet no cohort unduly agreed with these statements (while Gen Z had the most agreement it was still a neutral response at 3.05/5 albeit with a standard deviation of 1.25 indicating these elements impede some within this segment).

In contrast to anecdotal reports of a preference for home gatherings, there was little agreement with statements of preferring private or home gatherings. However, this result may not reflect the behaviours of hinterland residents where the transport and lack of NTE options may be intensified.

Being too tired or too busy with family to go out for night-time entertainment was also not supported as a constraint on participation in the SCNTE. Importantly, the data did not indicate a consideration of the impact on the next day's leisure activities as a decision factor limiting participation.

Table 6: Resident reasons for not participating in SCNTE

	Gen Z	Gen Y	Gen X	BB's	Total
I'm usually too busy with work or study or other things to go out at night much	3.05	3.09	2.38	2.00	2.66
I actually prefer just to go to private parties or hang out with friends at someone's place	2.81	2.72	2.60	2.95	2.78
I'm usually too tired or can't be bothered to go out for night-time entertainment	2.76	2.87	2.62	2.65	2.74
I'm usually too busy with family to go out for night-time entertainment	2.52	2.92	2.05	2.10	2.45

Sparrow culture myth busted!

Returning to our chicken and egg paradox, the belief in a pervasive "sparrow culture" on the Sunshine Coast appears unsubstantiated in the context of this data. While there is understandably a segment of our sample that is more motivated by early morning enjoyment of the natural assets, our data also shows that sparrows want to party too—well, sometimes at least!

Whilst our data indicates there is latent demand for more SCNTE, residents, and to a lesser degree visitors, have likely become conditioned over time to a reticent acceptance of early venue closures. As such, the "8.00pm lights out" sentiment has become a self-fulfilled prophecy, likely because of behaviours from a few decades ago.

> The belief in a pervasive "sparrow culture" on the Sunshine Coast appears unsubstantiated in the context of this data.

While not suggesting that venue owners will be swamped with patrons by immediately lengthening their operating hours, the results suggest potential for a change in cultural perceptions and behaviours should the opportunity be provided. With expected population growth and demographic changes, there is potential for corresponding growth in demand for longer operating hours.

But nowadays, aren't young people behaving differently? – Our research doesn't agree!

In further exploring the theme of cultural impediments for the SCNTE, our industry interviews identified observations about younger people: "They drink less", "They're more active during the days", and as a result, "Audiences are coming earlier and leaving earlier", suggesting that the 'night' in the night-time economy for Gen Z may not fit with their preferences of behaviours.

That sentiment alludes to other behavioural differences between generational cohorts, which has attracted significant scholarly attention and media commentary over the past decade. For example, a New Zealand study compared archival data from 1999-2001 with data collected during 2022. The study found a decline in young people's drinking habits and attributed this to "an increased value placed on personal choice and acceptance of diversity; decreased face-to-face socialising and the emergence of social media as a central feature of adolescent social life, perhaps displacing key functions of drinking and partying; increased pervasiveness of risk discourses and increased awareness of health and social risks of alcohol; and increased framing of alcohol use as a coping mechanism by both drinkers and non-drinkers" (p.1 Ball et al., 2023).

British research findings suggest that alcohol consumption and particular kinds of 'drinking culture' have changed and may have lost its symbolic power as a rite of passage into adulthood. There appears to be less peer pressure to drink or to drink excessively, and more room for competing activities. Burgess et al. (2022) found there has been a dramatic decline in alcohol consumption among younger people in the UK, including an increase in both 'conscious moderation' and outright abstinence.

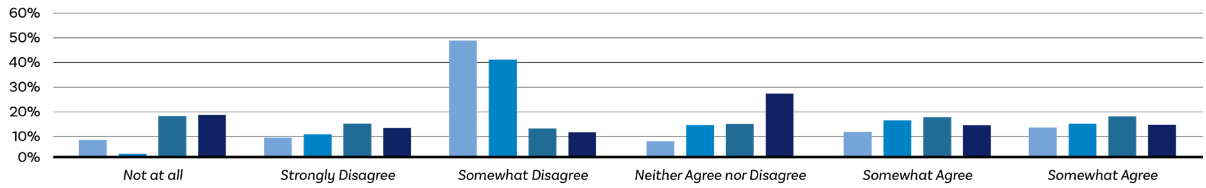
However, the findings of this research indicate a level of contrast with previous work in this field and general contemporary sentiment. Our data show Gen Z from the Sunshine Coast don't necessarily agree that the potential negative impacts of a big night out on their next day's activities influence their decisions to participate in the NTE (see Table 7). There were no significant differences across the generations for these results but interestingly Gen Z were less likely than all other cohorts to agree with the statement related to leisure activities. Nonetheless, the standard deviations as shown in Figure 7 in each of the age cohorts indicate a slightly different story (note: a 6-point slider scale was used for these questions in the survey).

Table 7: Resident perceptions about a 'big night out'

	Gen Z	Gen Y	Gen X	BB's	Total
I don't like having too big a night out because I don't want a hangover to affect my ability to enjoy the next day's leisure activities	2.43	2.79	2.56	2.47	2.57
I don't like having too big a night out because I don't want a hangover to affect my ability to work or study the next day	2.76	3.13	2.68	2.09	2.61

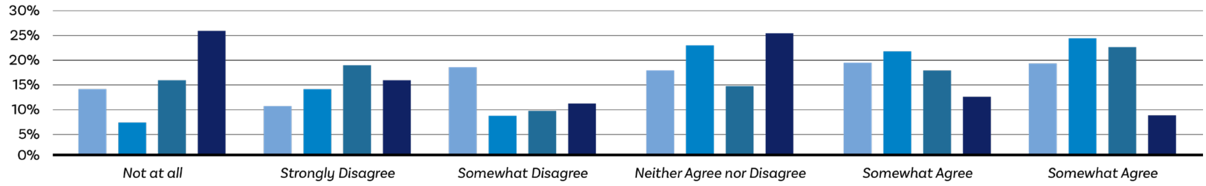
Figure 7: Histogram graphs for impact of hangover on next day's activities (resident surveys)

I don't like having too big a night out because I don't want a hangover to affect my ability to enjoy the next day's leisure activities



	Not at all	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Somewhat Agree
Gen Z	8.5%	9.9%	48.9%	8.5%	11.3%	12.8%
Gen Y	1.2%	11.1%	40.9%	15.2%	17.0%	14.6%
Gen X	18.6%	15.7%	12.7%	15.7%	18.6%	18.6%
BB's	19.1%	13.8%	11.2%	27.0%	14.5%	14.5%

I don't like having too big a night out because I don't want a hangover to affect my ability to work or study the next day



	Not at all	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Somewhat Agree
Gen Z	14.0%	10.8%	18.3%	18.3%	19.4%	19.4%
Gen Y	7.1%	14.2%	8.8%	23.0%	22.1%	24.8%
Gen X	15.8%	18.8%	9.9%	14.9%	17.8%	22.8%
BB's	26.0%	16.0%	11.3%	25.3%	12.7%	8.7%

It seems Baby Boomers aren't as concerned about impact on work, most likely because many may be retired. Whereas approximately one in three Gen Z were more likely to be concerned about impact on work or study, but not as concerned about impact on the next day's leisure activities. While in general terms our data contradicts previous studies it does indicate that approximately a third of Sunshine Coast Zoomers and almost half of Generation Y do consider the impact a big night out will have on their work or study commitments.

There is also debate around the impact of social media on Gen Z values and behaviour, given they are the first generation to have grown up with it. To that end, we tested how themes related to social anxiety and fear of missing out brought on by social media exposure may impact participation in the SCNTE. Again, our data diverges from contemporary perceptions or commentary, showing these are not significant factors impacting their decision-making around NTE participation. In fact, the responses to social media-related questions were the most strongly disagreed with in the whole survey across all generations.

The responses to social media-related questions were the most strongly disagreed with in the whole survey across all generations.

Gen Z, as expected, disagreed less (in some cases significantly different) with the responses of the older generations. This would most likely be due to their greater engagement with social media. This is more evident when considering the sharing of details of "good times" online, with some positive agreement to doing so by Gen Z and this being pointedly different from the Gen X and Baby Boomer responses (Table 8).

Table 8: Resident considerations of social media impact

	Gen Z	Gen Y	Gen X	BB's	Total
Will this be a worthwhile event for me to share on social media	1.69	1.66	1.08	1.11	1.41
If a friend were to see me out on social media without them they may hold it against me	1.70	1.74	0.94	0.88	1.36
I don't want compromising images or mentions of me ending up on social media	1.99	1.98	1.79	1.48	1.81
When thinking about going out for night-time entertainment I feel some anxiety	2.77	2.48	2.04	1.87	2.31
When I have a good time it is important for me to share the details online (i.e update my status)	3.08	3.06	1.98	1.73	2.57

The standard deviations for the variables in Table 8 did not indicate any significant subgroups within the generations (less than one in ten for each generation had any level of agreement with the statements). Although approximately one in three Gen Z indicated some level of anxiety when thinking about going out for night-time entertainment.

Nonetheless, our data reveals a somewhat different story regarding the fear of missing out on social engagement (Table 9). Gen Z and Gen X are more likely to agree with statements related to this theme and in most cases, there are clear differences between their responses and those of Gen X and Baby Boomers.

Table 9: Resident fear of missing out on social media

	Gen Z	Gen Y	Gen X	BB's	Total
I fear that others may have more rewarding experiences than me	3.45	3.30	2.54	2.38	2.95
I fear my friends may have more rewarding experiences than me	3.44	3.41	2.46	2.33	2.96
I get worried when I find out my friends are having fun without me	3.43	3.21	2.07	1.91	2.71
Sometimes I wonder if I spend too much time keeping up with what my friends are getting up to	3.12	2.96	1.96	1.91	2.54
It bothers me when I miss an opportunity to meet up with friends	3.75	3.47	2.48	2.47	3.09
When I miss out on a planned get-together it bothers me	3.60	3.52	2.49	2.41	3.06
When I go on vacation, I continue to keep tabs on what my friends are doing	3.28	3.10	1.95	1.87	2.61

These results indicate that the assumed psychological (internal) barriers related to the culture of Sunshine Coast residents (and to a lesser degree visitors) are not meaningfully restricting their participation in the local night-time economy. Importantly, our data has shown up a latent demand for more NTE activities. Therefore, it is external barriers that are more prominent constraints for participation. As one of the industry interviewees responded, "It's not that you don't have the people. It's that your people can't engage".

"It's not that you don't have the people. It's that your people can't engage".

I'd probably go out more if I could afford it!

The cost of living is of course is highlighted as a huge issue in popular and political discourse, and in the media. Our survey respondents, both residents and visitors alike, indicated strong agreement with the propositions offered that financial cost was a consideration in their decisions regarding participation in the SCNTE (m = 3.55/5). Driving this aspect was the cost of tickets (m = 3.53/5), if the event was free or cheap to attend (m = 3.32/5) and the costs of transport (3.14/5). There were low levels of standard deviation in the results within all age cohorts however there was a noticeably stronger consideration of costs amongst the older Gen X and Baby Boomer cohorts.

Compounding the cost of living impact on NTE participation is the emergence of an increasingly competitive live entertainment market. As noted earlier, this has been driven by pent-up demand resulting from the Covid period and is currently driven by a high volume of large international touring acts such as Ed Sheeran, Elton John and Taylor Swift. Many consumers are choosing to spend their now more limited discretionary cash on attending special events resulting from the influx of international touring artists to the detriment of attending local shows. The Sunshine Coast region has limited large venue options. Therefore, the local scene doesn't compete well when large events are staged in nearby Brisbane or on the Gold Coast.

The cost of living is a double-edged sword that impacts consumer spending habits and business costs. The Sunshine Coast is often referred to as "the land of small businesses" and this is particularly reflective of the SCNTE. The industry interviews highlighted the challenges for businesses to retain staff who could no longer afford to live close to traditional NTE precincts along with the ever-increasing cost of supply chains, rents and insurances.

This demonstrates the SCNTE is in a similar circumstance to other precincts around Australia where huge increases in trade costs in the past 18 months, combined with a reduction in footfall in response to the cost of living crisis is placing it in a situation of precariousness.

Transport

The effectiveness of public transport services across the Sunshine Coast region is often debated (Sunshine Coast News, 2023) and has broader implications for the Sunshine Coast that extend beyond the night-time economy. The elongated urban form stretching more than 60 km between Noosa Heads and Caloundra is dependent on motorway connectivity. Further, the string of hinterland towns also has quite limited public transport connectivity. In our industry consultation, this issue was identified as a significant barrier to consumer participation in SCNTE. The following results from our resident and visitor surveys confirm this issue but provide some deeper insights into perceptions and actual behaviours.

When asked to nominate the usual mode of transport for NTE, 86.5% of residents nominated their personal vehicle. More residents nominated that they walk to NTE (11.1%) than using taxis (9.0%) or a bus (8.1%).

When asked to nominate the usual mode of transport for NTE, 86.5% of residents nominated their personal vehicle. More residents nominated that they walk to NTE (11.1%) than using taxis (9.0%) or a bus (8.1%).

When asked to comment on the choice of personal vehicles the key preference themes were convenience and ease (*"no other choices", "the public transport is unreliable and doesn't go where I need", "easiest and fastest"*); and safety and comfort (*"I feel safer in my own car and have control on when I arrive and leave", "comfortable seat and driving environment"*).

Accordingly, perceptions of public transport were investigated in our research. When comparing perceptions of buses, taxis and rideshare options, taxis were viewed as the most expensive but the safest and most convenient form of public transport. Yet none of the options were rated positively for convenience. While buses were considered the least expensive, they were also viewed as the least safe and significantly less convenient. Rideshare was rated as somewhat more competitive than taxis based on cost and convenience, but similar in safety.

We acknowledge that various venues on the Sunshine Coast have trialled shuttle buses in the past with limited success. Based on our research, we believe the lack of uptake of these services and the current existing public transport services is due to residual negative perceptions amongst the community that have been built up over time. In essence, public transport on the Sunshine Coast, in general, has something of a brand identity issue that needs to be addressed by a combination of more relevant service offerings andmore effective communications campaigns.

Our results confirm that not being able to get to and home from night-time venues via public transport is a barrier to participation, resulting in higher usage of personal vehicles than might be expected when compared to other metropolitan destinations. This situation compounds other issues, such as traffic congestion in destination precincts and road safety at night. Paradoxically, it is the availability of free local parking, costs and lack of taxis or rideshare options and a more recent increase of designated driver practices that make use of personal vehicles a more viable and attractive option *"It's cheaper and we always have a designated driver"*.

The results also indicate that participation in NTE is somewhat constrained to local areas, with a relatively high number of residents choosing to walk to NTE. This, combined with the latent demand for more local NTE, particularly from Gen X (Table 10), suggests that a focus on enhancing local NTE precincts and servicing them with localised public transport services during peak NTE operational hours could could go someway to addressing such a key constraint.

Table 10: Resident support for more SCNTE

	Gen Z	Gen Y	Gen X	BB's	Total
There should be more opportunities for night-time entertainment in my local area	3.65	3.63	3.97	3.32	3.61
It is important to have night-time entertainment in my local area	3.54	3.59	4.08	3.51	3.65

Safety

Safety is usually a critical consideration for night-time entertainment precincts and NTE. However, this factor did not emerge as a dire issue in any of the industry interviews. Findings from the surveys supported the sentiment that concern for personal safety is not a significant barrier to NTE participation for the Sunshine Coast or local NTE precincts (see Table 11).

Table 11: Resident perceptions of SCNTE safety

	Gen Z	Gen Y	Gen X	BB's	Total
The night-time entertainment scene on the Sunshine Coast is unsafe	2.85	2.99	2.97	2.92	2.93
The night-time entertainment scene in my local area is unsafe	2.83	2.79	2.82	2.74	2.79

Our survey showed visitors hold similar perceptions to residents when asked if they felt the Sunshine Coast night-time entertainment scene is unsafe (m = 2.86/5). Operators and stakeholders alike should be encouraged by these findings. While work needs to continue to maintain this standard, it provides an opportunity for the region's NTE to be promoted in a positive light.

Community Permissions - I love live music but not in my backyard

In discussing the state of live entertainment on the Sunshine Coast with industry operators, the conversations invariably turned to the availability of venues and the operational challenges. It is noted that several larger or prominent Sunshine Coast venues have closed recently. The reasons behind such closures can often be complex, and as noted previously, the impact of COVID-19 lockdowns impacted the financial sustainability of some of the venues.

Nonetheless, a prominent theme that emerged from the industry interviews related to the licenses and permits required to provide live entertainment and how this is a critical constraint to the industry, particularly for small hospitality venues and public events. There are two aspects to this issue.

First, there are the compliance and process requirements. These are considered onerous, unduly limiting regarding decibel volumes, and overly-complex due to multiple agencies involved in approving licenses and permits and policing regulations. Licensing is time-consuming, costly, and often "too hard", particularly for small venues such as cafes and bars hoping to augment their service offering with simplistic live music.

Second, it only takes a single public noise complaint for the regulations to be acted upon by various enforcement mechanism. As such, a single individual, be it a competitor or a small minority from within a local community, can exert considerable sway over what venues are allowed to provide, regardless of the broader social and economic benefits that presenting live music in small venues or outdoor events provides to a community.

Compounding the issue is the lack of understanding among operators and consumers alike regarding which agency is responsible for licensing and policing live entertainment. As such, “the council” is often blamed or represented as the problem in these matters, as evidenced in recent mainstream and social media commentary. However, in Queensland, the state government Office of Licensing and Gaming Regulation (OLGR) provides licenses for and enforces noise limit conditions on premises with a liquor licence. Whereas, unlicensed premises and/or public events are a local council and/or Queensland Police Service issue.

Standards for permittable noise levels are applied based on the Environmental Protection Act (EP) Act 1994. Regardless of the overseeing agency, the standards for noise levels are somewhat vague and are difficult for operators to interpret. The information states that under the EP Act, *“Even where the generation of noise is not specifically prohibited under default noise standards, action may be taken for causing an environmental nuisance which can be considered an offence against the Act”.*

However, it should be noted that Section 4400 of the EP Act enables local laws to prescribe an alternative noise standard. That is:

> *“if the default standards do not suit a particular local council area, the local council can develop its own standards that reflect the needs of the local community. The default standards in the EP Act aim to recognise the needs of businesses and individuals in undertaking activities that generate noise while achieving an appropriate acoustic environment for the amenity of residential areas. In recognition of the different needs and circumstances of local communities across Queensland, the EP Act provides a flexible regulatory environment for local councils to vary the default standards.”*

To that end, Special Entertainment Precincts have been designated for the Fortitude Valley in Brisbane and the Nambour CBD on the Sunshine Coast.

In New South Wales, the Minns Labor government has acted to address similar issues regarding live entertainment licensing, regulation and public complaints. They aim to remove red tape to bring back live music and encourage local entertainment zones that are as vibrant and diverse as traditional precincts like the Sydney CBD – especially at night.

The NSW government package of reforms introduced in 2023 (NSW Government, 2023) included the appointment of a 24-hour economy commissioner as a statuary appointment and empowers venues that host live music to trade two hours longer under streamlined licensing laws. It is overhauling regulatory frameworks to prevent single complainants from shutting down venues by providing just one set of laws for noise disturbance complaints against live music and performance venues, with higher hurdles imposed for complaints to progress and no avenue for a single complainant to close venues. The 'order of occupancy' will be made a central consideration in disturbance complaints to address the situation in which newcomers to a neighbourhood work to shut down or wind back the entertainment offerings and/or operating hours of established venues.

Additionally, a new framework for NSW local councils that makes it easier for them to deliver vibrant, safe going-out destinations supported by adequate and reliable transport and good lighting supports councils to ease the way for creatives and community groups to stage pop-up events and festivals, including street closures and global pre-approvals for event sites.

Based on the above findings and the strong support shown in our resident and visitor surveys for increased SCNTE, particularly in local precincts, a review of the current policies and processes related to live entertainment licensing and public noise complaints is warranted.

Venues – or lack thereof

The industry interviews highlighted that the Sunshine Coast has a disconnected array of venues with significant capacity gaps and no clear pathway for fostering emerging artists. As noted, we have seen the recent closure of prominent venues. It seems the heady days of the 1990s when the Sunshine Coast was very much a destination for national touring bands has steadily declined. This along with the other factors discussed above contributes to the sense of a 'lack of vibe' in the region (see Check 1,2... Report).

Nonetheless, the region's growth in population and changing demographics suggest positive market opportunities. Our resident and visitor surveys demonstrate latent demand. To this end, we are seeing some entrepreneurial-led green shoots emerging. For example, the Norton Music Factory in Caloundra has established itself in an industrial area of Caloundra. Groovin' the Moo festival held a very successful event on the Sunshine Coast in 2023, they were mooted to return in 2024 although more global issues resulted in the cancellation of their national program for the short term. The Comiskey Group's proposed development of Coochin Fields as a festival and expo site, and their investment in entertainment and hospitality venues at Doonan, Eumundi and Aura, demonstrate a willingness to invest in the SCNTE. The local government's support for establishing Nambour CBD as a Special Entertainment Precinct is also encouraging.

As areas of the Sunshine Coast continue to grow in population and development, there is an opportunity for establishing more special entertainment precincts clustered around existing and emerging village hubs. The small venues model is exemplified by the recent rejuvenation of the Noosa Junction precinct. In conjunction, as the new Maroochydore CBD evolves, consideration could be given to establishing a midsize live music venue that could also be complimented by small bar venues in that precinct.

Conclusions - what does this all mean?

There are several conclusions and corresponding recommendations to be drawn from our research.

The findings from our surveys show that perceptions of a “lack of vibe” regarding the SCNTE do exist. There is general agreement that “things close too early”. Yet there is latent demand amongst residents and visitors alike for more NTE at both the regional and local level. We investigated cultural aspects of the population that might result in psychological or ‘internal’ barriers to participation and also the more tangible physical or ‘external’ barriers.

Sparrows still need to eat and socialise

Regarding internal barriers, we firstly found support that there is an apparent “sparrow” culture amongst the Sunshine Coast population, mostly driven by a desire for the use of the attractive natural assets of the region. Yet this should not be viewed as a significant constraint to participation in the NTE. People still yearn for opportunities to socialise with family and friends and to get out and experience the food and live entertainment in our region. They do not consider having a night out as an impediment to their next day’s leisure or work activities and there was little variation in this sentiment across generations. However, the late afternoon and early evening offerings for dining and socialisation are warmly embraced, aligning with the somewhat unique cultural lifestyle-driven behaviours of the region.

While there are some anecdotal comments that more people go out for breakfast on the coast than dinner (early birds get the worm?) the latent demand for NTE identified in our surveys should encourage venue operators that there is a “lark” market which is likely increasing with recent population shifts. However, if the more predominant sparrow lifestyle is what makes the Sunshine Coast unique and attractive, then embrace it and adapt our hospitality and entertainment offerings to suit how local consumers behave. As such consideration could be given to adaptable business models for cafes and restaurants whereby certain time frames (e.g., breakfast sessions) are sub-leased to other operators to maximise the revenue potential of venues by servicing both the sparrows and the larks.

Talkin' 'bout those generations!

Much has been made of changed behaviours in Generation Z. Academic studies have certainly indicated less reliance on going out to traditional NTE activities, alcohol consumption is reducing, and a number of anxieties have emerged as a result of social media pervasiveness.

However, our data contradicts this narrative. These factors were not shown to be significantly impacting the decision-making around NTE participation amongst the Sunshine Coast population of Zoomers. This is not to say the factors don't exist, just that the financial costs and travel issues are more apparent factors for them when deciding on whether to participate.

On a positive note, Zoomers and Generation Y from our surveys had higher NTE participation rates and per night average spending than all other generational cohorts. So not to be different from previous times, young people are more likely to engage in 'lark' behaviour than those older 'sparrows'!

So, what is impeding the NTE?

In summary, psychological or internal constraints didn't show up as the most significant constraints or barriers to SCNTE participation. The pandemic lockdowns and social distancing enforcement led to crowd avoidance and hesitancies to book tickets in the short term, but those factors have mostly dissipated. Entrenched local cultural behaviours and attitudes prevail and influence how NTE is participated in and in turn how it is perceived. While safety concerns may be internalised, the occurrence of, and any publicity around, incidents can manifest as a tangible deterrent. However, at this time safety concerns are not viewed as a significant constraint.

The key takeout from our resident and visitor survey is that the local NTE is valued and there is latent demand for more of it. This then reinforces the comment made to us during one of our industry interviews *"it's not that you don't have the people, it's that your people can't engage".*

Unavoidably, the more prominent external barriers of financial costs and lack of effective transport options constrain participation in the SCNTE. Or at the very least lead to behaviours such as 'pre-loading' prior to going out or calling 'early stumps' on nights out.

Added to this is the lack of venues. To some degree, this aspect is driven by the impediments of coping with the financial impacts of the above-mentioned consumer behaviours along with supply chain costs (a double whammy for operators). Then a further critical constraint is the bureaucratic impediments for venue and event licenses and permits which add further costs and leave operators vulnerable to complaints from usually vocal minorities who may object to noise generated by the NTE – even if it is all over at 8.00pm.

Combined, these external elements are primary constraints for the SCNTE. If remedied, they would likely moderate the internal or psychological constraints in the minds of consumers.

Placemaking - a pathway forward

Our research has identified a need for and opportunities to foster a diversity of localised offerings in terms of style, locations, and timings. This could be termed a 'placemaking' strategy for the Sunshine Coast across the string of villages that make up the Sunshine Coast. In doing so, the unique culture and personalities of individual villages can be leveraged (as opposed to changed) and enable a broader regional solution to destination branding issues related to 'lack of vibe' perceptions.

The placemaking strategy aims to mitigate the broader external constraints to the SCNTE and empower local villages to tap into the latent demand amongst residents and visitors alike. This would provide an integrated top-down approach to the issues of venues' entertainment licensing and transportation access, combined with a bottom-up approach of vendor collaborations, activations and place marketing will stimulate village economies to sustain hospitality, entertainment, and other creativity-based employment. Thus, we recommend piloting the following seven elements to comprise an overall placemaking strategy:

1. Village hub development

Adapt examples such as Noosa Junction and Nambour, whereby local business collectives, commercial property owners and lessees are empowered to collectively activate smaller NTE precincts across the villages that comprise the Sunshine Coast. Recommendations for supporting this element are:

- Pilot village hub development for two to three villages through the identification of an existing or emerging group of businesses within each village who are willing to work collaboratively together and with local government.
- Aim for a diversity of business types (e.g., café's, microbreweries, restaurants, live music bars, cinemas and nightclubs) to provide mixed entertainment offerings for diverse patronage (note: each hub would differ in its mix of venues based on village circumstances).
- Co-creation of activations by stakeholders within those villages that are diverse in both appearance (e.g., street art, music, ambient lighting) and timings that fit with each local community's lifestyle and culture.
- Collaborative promotional communications between stakeholders should focus on a "go local" message and the distinct flavour of each village hub.
- Plan ease of amenity for customers through adaptable traffic, parking and public transport options that suit the village dynamics.

The advantages of such approaches include:

- ***Convenience*** - less reliance on broader public transport and reduced financial and non-financial costs for locals to participate in the NTE.
- ***Diffusion*** - less crowding of existing centralised precincts to mitigate broader regional safety and public transport challenges.
- ***Stickiness*** - more opportunity for tourists to stay, engage and spend in local village economies.
- ***Distinctness*** - ability to develop unique cultural spaces that contribute to the overall diversity of the Sunshine Coast lifestyle and brand.
- ***Viability*** - support for local employment contributing to village living affordability.

2. Boutique festivals and events

While many of the larger national touring style festivals are currently in decline there is an emerging popularity for boutique-style craft food and beverage events. The Sunshine Coast's plethora of community parks and rural spaces places, set within somewhat unique natural settings make for special and attractive event locations. This, combined with a burgeoning craft brewing and distilling industry/artisanal food and agricultural network, means the Sunshine Coast is well placed to take advantage of the market gap created by the decline of larger festivals. The opportunity calls for the development and hosting of smaller boutique-style 'camp and play' festivals which are blend of music, artisanal cuisine, special interests and creative well-being entertainment.

Event promoters should be encouraged under the region's broader major event strategies and funding programs to target the development of such events across the calendar and region, in alignment with the distinct village hubs outlined above.

3. Working in industrial spaces

A novel opportunity exists to reconceptualise industrial spaces as occasional or permanent entertainment spaces. Where appropriate, commercial venues could be retrofitted for music and other cultural practices/performances, as well as feature as part of the establishment of smaller hospitality and entertainment venues such as micro-breweries and cafes. The use of such industrial spaces as night-time venues offers a key advantage in that their proximity greatly reduces the potential for residential noise impact.

Currently, there is an established pilot program in place on the Sunshine Coast. We refer to the Light Industry Project (www.lightindustry.net) being managed by Feral Arts at Kunda Park here on the Sunshine Coast. The project is a multi-sector project establishing the Light Industry studio as a unique new Circular Economy and Creative Community Hub. It is being developed as a pilot for a larger, national program underpinned by the vision of industrial estates and manufacturing precincts across the country being activated, revitalised and renewed by local artists and creatives. It is designed to leverage the unique skills of independent artists as a part of the working community to engage local businesses, build networks, experiment, make and recycle – connect, create, renew!

Some of the key challenges for this approach include reconsideration of development approvals and licensing frameworks to provide for multi-use purposes. In addition, consideration needs to include planning for ease of transport access, parking and community safety. Nonetheless the practice is emerging at a grassroots level regardless of existing permits. This is evident where a number of hospitality and entertainment venues have sprung up in association with micro-breweries in other industrial precincts across the Sunshine Coast. And given the locations this is occurring with apparent minimal impact on residential spaces.

4. Village hub public transport circuits

Our research indicates that the current public transport offerings do not suit the needs of patrons wishing to participate in the SCNTE. Our research also indicates that participation in NTE activities is somewhat constrained to local areas, for example, the relatively high number of residents choosing to walk to entertainment activities and the significant number choosing personal vehicles out of convenience as the predominant form of transport. A lack of safe, affordable, reliable public transport that services local villages (as opposed to main centre connections) is a constraint to the SCNTE.

Therefore, a recommendation is to review current bus routes and services with a focus on providing new services that align with the piloted village hubs during peak NTE operational times. Piloting of services should be conducted for small buses circuiting a 10-15klm radius of the hubs on a ½ hourly basis during peak NTE times (e.g., between 5.30pm – 9.30pm on relevant evenings). These could be programmed in tandem with hourly inter-suburb connections where relevant.

Collaboration with village hub operators and stakeholders should aim to offset operating costs and encourage take-up. This could be done through joint marketing/promotional campaigns and opportunities for localised advertising on the services.

As noted earlier, we believe these piloted services would only succeed if supported by a more positively framed and better resrouced social marketing campaigns that target the residual negative perceptions and encourage new behaviours for public transport.

5. Review entertainment permitting and noise complaint policies and procedures

While the rights of communities should be protected when it comes to noise pollution, the current policies and procedures for live entertainment permitting and enforcement are ambiguous, not fit for purpose and disadvantageous to fostering the SCNTE.

Along the lines of the recent review of such state-based regulations in NSW, local stakeholders should work with the Queensland Government to provide a more efficient framework under which the establishment of village hubs as NTE precincts can be enabled.

This should include a review of noise complaint response and enforcement processes to mitigate the threat to small venue operators whereby a single vexatious or unreasonable complainant can shut down a venue. This is particularly relevant for smaller venues such as restaurants or cafes where compliance with default noise standards and any subsequent direction notices is too expensive and complex to continue offering services augmented by live entertainment.

Local councils should also be supported to ease the way for creatives and community groups to stage pop-up events and festivals, including street closures and global pre-approvals for event sites.

It is further recommended that a program of industry consultation and education around entertainment permitting, and noise limits be enacted to inform a more conducive environment for fostering the development of village hubs and the broader SCNTE.

6. A centralised 2,000 capacity performance venue

The Sunshine Coast lacks a larger pub rock-style venue to host national touring bands. As the Sunshine Coast is slated for substantial population growth over the next 5-10 years, establishing a dedicated mid-sized performance space as part of the Maroochydore CBD cultural precinct development should be a critical consideration to support the NTE. Considerations include:

- Without such a venue, the Sunshine Coast might be unable to benefit sufficiently from influxes from significant future events (e.g., 2032 Olympic/Paralympic Games), which may also impact the potential to leverage opportunities to host future international events.
- This recommendation would align with calls from the business events sector to establish a Convention Centre for the Sunshine Coast to compete in what is the lucrative business tourism market. The ability to host touring performers would augment the financial viability of such a Convention Centre.
- The apparent current willingness of commercial enterprises to invest in live entertainment venues on the Sunshine Coast could offer partnership opportunities.
- Building such a venue would create ongoing jobs to support a growing population.
- It would also fill a gap in development pathways for local bands to play as support acts for the touring bands or to headline alternate gigs.

7. Placemaking communications

From an individual venue and a village hub destination marketing perspective, psychological motivators to engage in NTE can be used to stimulate the latent demand that has been identified through our resident and visitor research. As shown in Table 12 these motivations are strongly related to experiences, a desire for socialisation and a willingness to support local operators.

Table 12: Resident and visitor motivations for attending night-time economy activities

Activity	Gen Z		Gen Y		Gen X		BB's		Total	
	Res	Vis	Res	Vis	Res	Vis	Res	Vis	Res	Vis
To experience live entertainment	4.13	3.90	4.24	3.86	4.12	3.63	3.49	3.59	3.99	3.73
To socialise with friends/family	4.34	4.08	4.30	4.05	4.09	4.15	3.87	3.81	4.16	4.02
To experience new and different things	4.25	3.90	4.13	3.95	4.05	3.90	3.43	3.61	3.96	3.83
To escape from everyday routine	4.13	3.72	4.15	4.01	4.04	4.04	3.36	3.49	3.91	3.82
To support the restaurants, bars, artists and businesses	3.92	3.78	3.95	3.82	3.94	3.86	3.69	3.83	3.87	3.82
To watch specific performers	3.94	3.42	4.04	3.54	3.88	3.40	3.49	3.32	3.84	3.42
To be with people of similar interests	3.94	3.32	3.85	3.67	3.72	3.59	3.55	3.61	3.77	3.57
Because I prefer it over online/ digital entertainment	3.79	3.50	3.66	3.38	3.56	3.45	3.17	3.46	3.54	3.44
To meet new people	3.54	3.22	3.47	3.19	3.19	3.09	2.81	2.84	3.26	3.07

When developing the marketing mix of either village hubs or the broader region the above insights should be woven into both the development of product offerings and promotional communications.

Summary

Based on our research this placemaking strategy provides a pathway for how the Sunshine Coast can move forward to refresh and progress its NTE, while maintaining its unique regional character. This is intended to be integral with broader regional economic and community development strategies in place as we look towards opportunities presented through the 2032 Olympics.

The aim is to tap into what makes each of our villages and larger precincts special, and empower them as individual spaces that when combined can transform and create an overall identity that positions the Sunshine Coast as a destination with a unique NTE vibe that compliments its natural assets and lifestyle.

This whitepaper provides an evidence-based insight into the SCNTE upon which to base the placemaking strategy recommendations. It is acknowledged that the data generated from the research project is comprehensive and not all results are reported here. There is potential for deeper statistical analysis of the data and should readers have questions or observations about any particular element of this report, or desire further investigation of the data to assist with their own operations, they are encouraged to contact the UniSC research team.

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