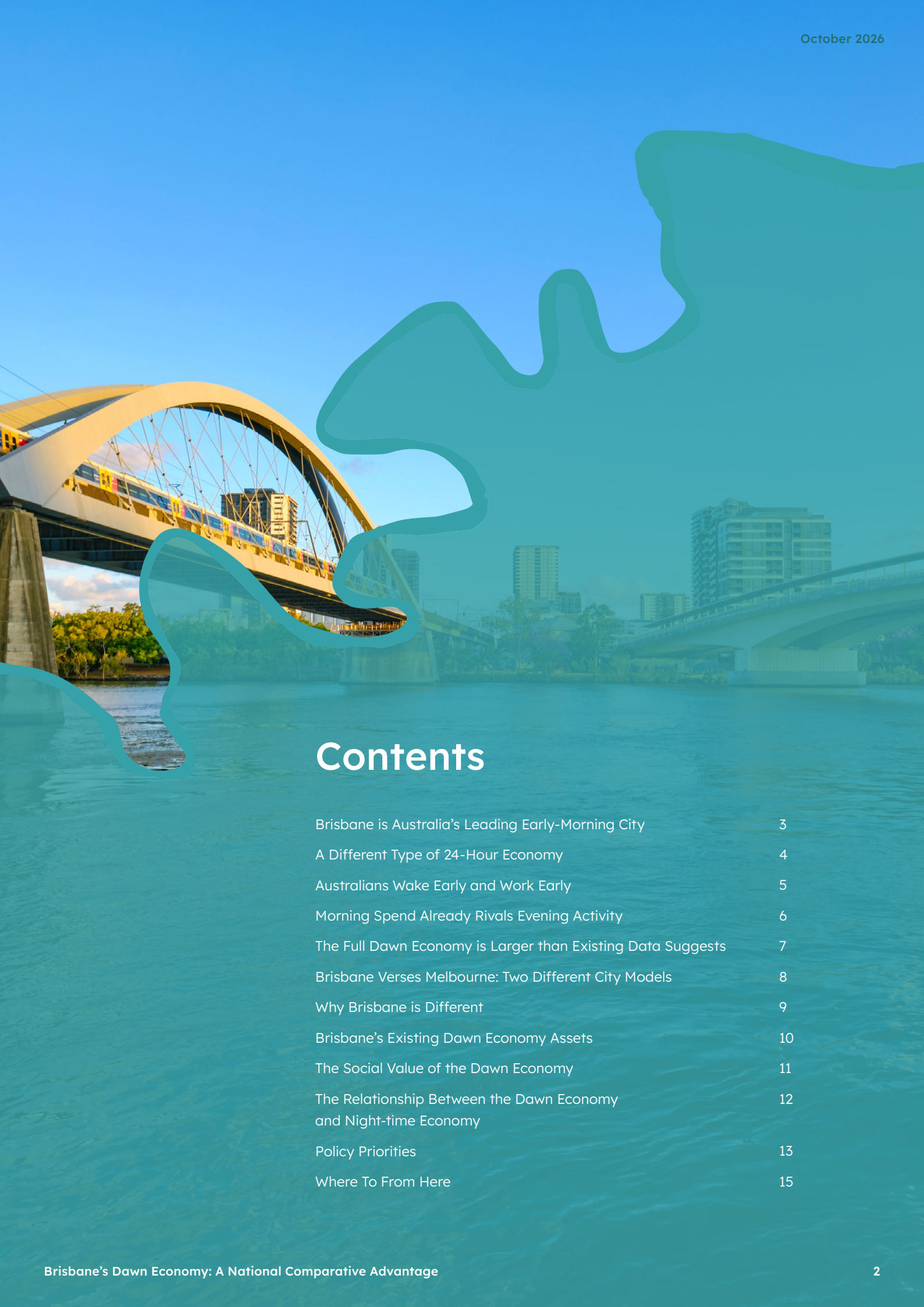


Brisbane's Dawn Economy

A NATIONAL COMPARATIVE ADVANTAGE



October 2026



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Brisbane is Australia's Leading Early-Morning City

Brisbane has a long-standing reputation as an outdoor city shaped by its subtropical climate, river, parks and active lifestyle. What has received far less attention is the extent to which these characteristics have created a distinctive economic pattern and form a fundamental component of the city's identity.

Emerging evidence suggests Brisbane is not only developing a strong dawn economy. It may already possess the strongest early-morning economy of any major Australian city.

Importantly, the dawn economy should be understood as one component of a broader 24-hour economy. Economic activity occurs across distinct periods of the day, each performing different but complementary functions. Daytime supports professional services and retail, evenings support dining and social engagement, nights support hospitality and culture, while the early morning supports commuting, recreation, health, hospitality and essential services.

Brisbane is widely acknowledged as one of the earliest-rising cities in the world. Research undertaken by Ingenium highlights evidence showing that economic activity between 5am and 11am generates economic benefits comparable with activity occurring between 7pm and midnight. This finding fundamentally challenges traditional assumptions about the relative importance of morning and evening activity within the broader 24-hour economy.

While policy discussions have historically focused on activity after dark, Brisbane's competitive advantage may lie in recognising that significant economic, social and cultural value is already being created before most Australian cities have fully started their day.

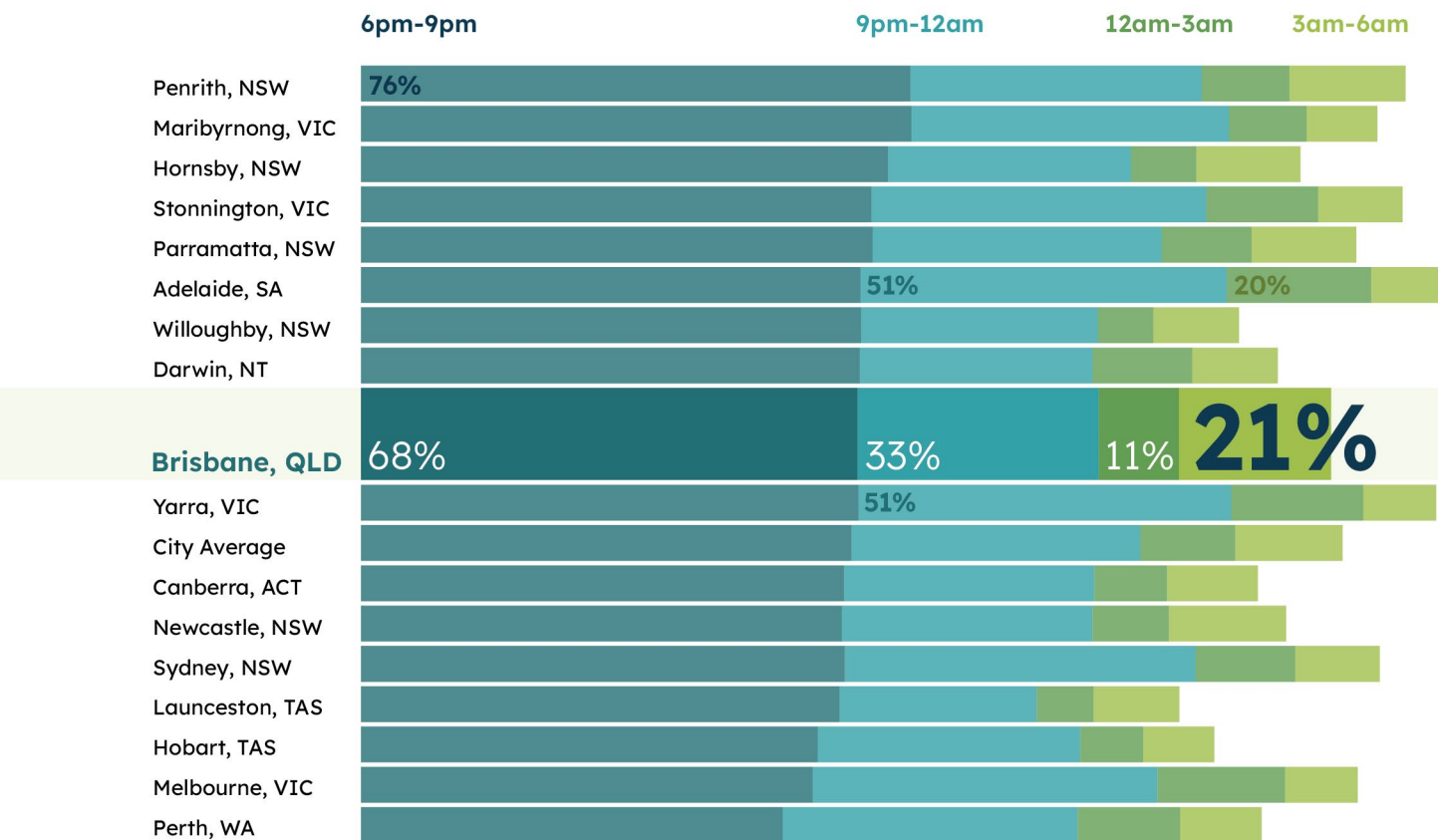
A Different Type of 24-Hour Economy

Cities around the world are increasingly adopting 24-hour economy frameworks that recognise the interconnected roles of the dawn, day, evening and night-time economies. Brisbane's opportunity is not simply to strengthen activity after dark but to recognise how activity throughout the entire day contributes to productivity, liveability and city identity.

Nationally, **around 4.1 million Australians, representing 29 per cent of the workforce, regularly work at night.** The largest concentrations are in health and social assistance (682,000 workers), accommodation and food services (476,000) and professional, scientific and technical services (386,000). Activity outside traditional business hours is already a major component of Australia's economy (Edwards, 2025).

The CCCLM Measuring the Australian Night-Time Economy 2026 report provides compelling comparative evidence. **Brisbane is a significant national outlier in pre-dawn business activity, with approximately 20-21 per cent of businesses operating between 3am and 6am on weekday mornings**, substantially exceeding most Australian cities.

Brisbane's pre-dawn activity levels are more than two times those recorded in Melbourne and significantly higher than most participating Australian cities. Importantly, this activity is sustained consistently from Monday through Friday rather than being concentrated around weekends. This demonstrates that Brisbane's morning economy is embedded in everyday economic and social behaviour rather than event-based activity.



Australians Wake Early and Work Early

Australian Bureau of Statistics data (ABS, 2026) highlights Australia’s unusually early waking patterns. **Australians wake at an average of 6:41am on weekdays and 7:18am on weekends.** These behaviours provide a strong foundation for morning economic participation.

Australians do not simply wake early. They work early. ABS data (ABS, Time Use Survey, 2024) shows almost one in five Australians aged 15 and over are already

engaged in paid work by 7am, while more than one-third are working by 8am. By 9am, approximately two-thirds of Australians participating in paid employment have commenced work.

These patterns suggest the morning period is not merely preparation for the workday. It is already a highly productive and economically active part of daily life.

Australians commence work by

9am



8am



7am



Morning Spend Already Rivals Evening Activity

Analysis undertaken by Ingenium Research using Visa Destination Insights data found that morning activity between 5am and 11am accounts for between 12 and 20 per cent of daily expenditure across Australian capital city CBDs (Edwards A., Committee for Brisbane Dawn Economy Event, 2026).

Morning spending is led by retail, dining and grocery purchases, demonstrating that the morning economy is not simply a transition period between home and work but a substantial consumer economy in its own right.

The available evidence suggests the measured 3am-6am economy represents only the earliest component of a much larger economic ecosystem extending well into the morning. An example of this is the morning market economy which involves a much earlier set up period between 3-6am. The economic significance of the dawn economy remains under-recognised in policy and planning discussions.



12-20%
of Daily Expenditure



The Full Dawn Economy is Larger Than Existing Data Suggests

Examples of activity undertaken at different time intervals of the morning include:

3–6am

Airport activity
Freight and logistics
Hospital and health
workforce activity
Early-opening cafés

Fitness centres
Manufacturing and service
preparation activities
Market preparation activities

6–8am

Walking and cycling activity
Park utilisation
Riverfront recreation

Active commuting
Fitness and wellness businesses
Morning hospitality activity

8–11am

Business breakfasts
Markets
Flexible work patterns
Coworking activity

Tourism experiences
Experiential retail
Education and knowledge
precinct activity

The available evidence suggests the measured pre-dawn economy represents only one component of a larger network of activity extending throughout the morning period.

Brisbane Versus Melbourne: Two Different City Models

Melbourne is often regarded as Australia's benchmark night-time city.

The CCCLM report found approximately 45 per cent of Melbourne businesses remain open between 9pm and midnight on Friday and Saturday evenings, with 15 to 16 per cent trading between midnight and 3am. Melbourne's strength is concentrated in traditional late-night activity (Edwards A. , 2026).

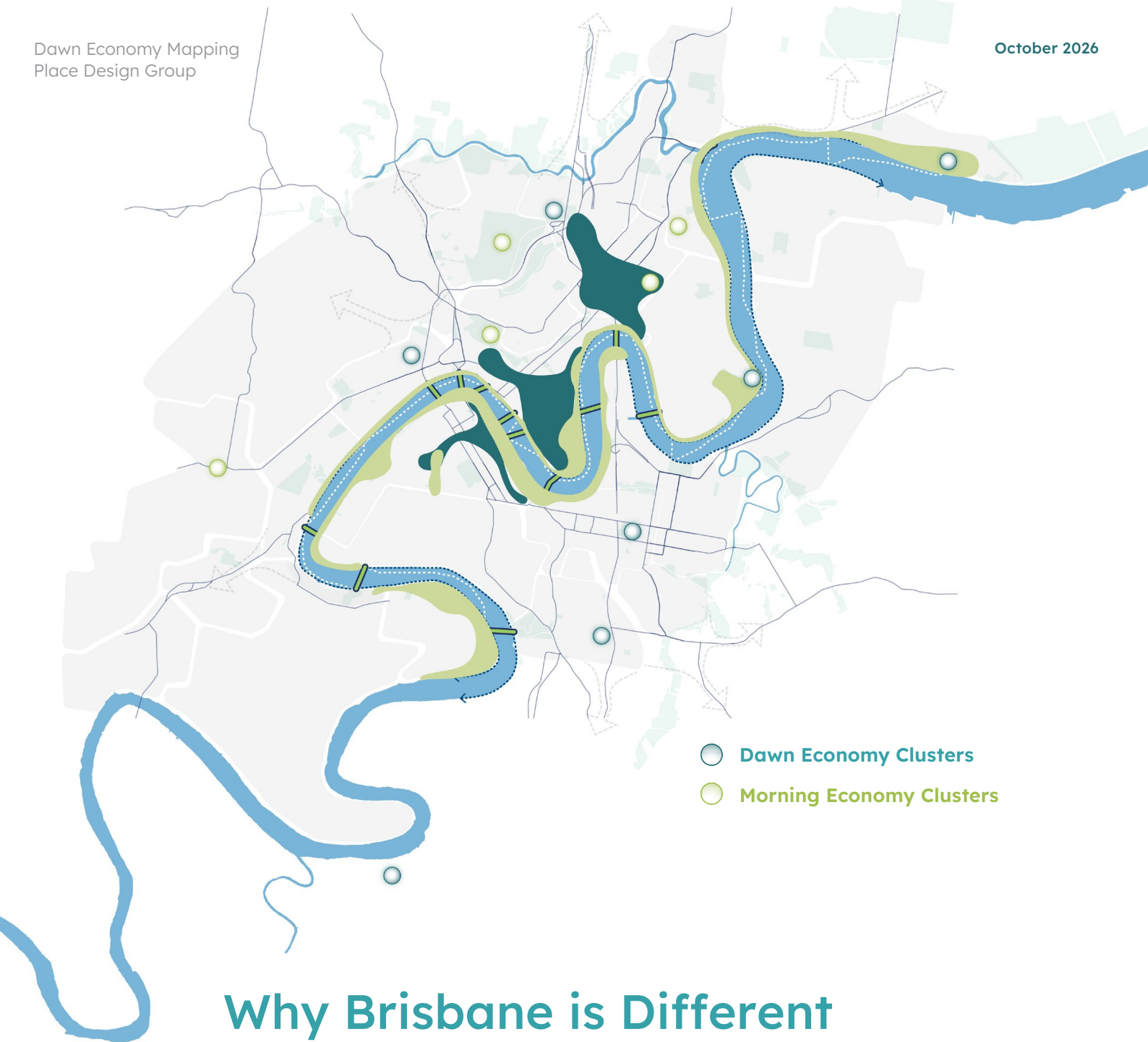
Brisbane exhibits a fundamentally different pattern.

While Brisbane maintains a strong and growing night-time economy, the city's most distinctive characteristic is the scale of activity occurring before sunrise. Brisbane generates lower levels of very late-night trading but substantially higher levels of early-morning activity (Edwards A. , 2026).

Rather than attempting to replicate Melbourne's model, Brisbane has an opportunity to embrace and grow the characteristics that make it unique.



Brisbane's competitive advantage lies not simply in becoming a better nightlife city, but in becoming Australia's premier dawn-to-dusk city.



Why Brisbane is Different

Analysis undertaken by the Committee for Brisbane's City Vision sub-committee on precinct connectivity identified several underlying drivers as to why Brisbane may have a stronger morning economy than other cities:

- **Early-rising residents**
- **Location on the eastern seaboard (sun rises early)**
- **Traditional outdoor lifestyle**
- **Flexible work arrangements**
- **Changing commuting patterns**
- **Increasing focus on fitness and wellbeing**
- **Growing preference for local experiences**
- **Expanding use of green space**
- **Greater utilisation of Brisbane's river environment**
- **Precincts and connections that embrace active travel**
- **Demand for experiential lifestyle offerings**

These findings align closely with national trends identified by Ingenium Research, including healthier lifestyles, stronger community connection, flexible work, experience-based consumption and growing morning activity patterns.

Brisbane's climate amplifies each of these trends. Unlike many global cities where outdoor activity is constrained by weather and seasonality, Brisbane supports year-round outdoor recreation, riverfront activation, exercise, tourism and public space utilisation. This creates a natural advantage that few Australian cities can replicate.

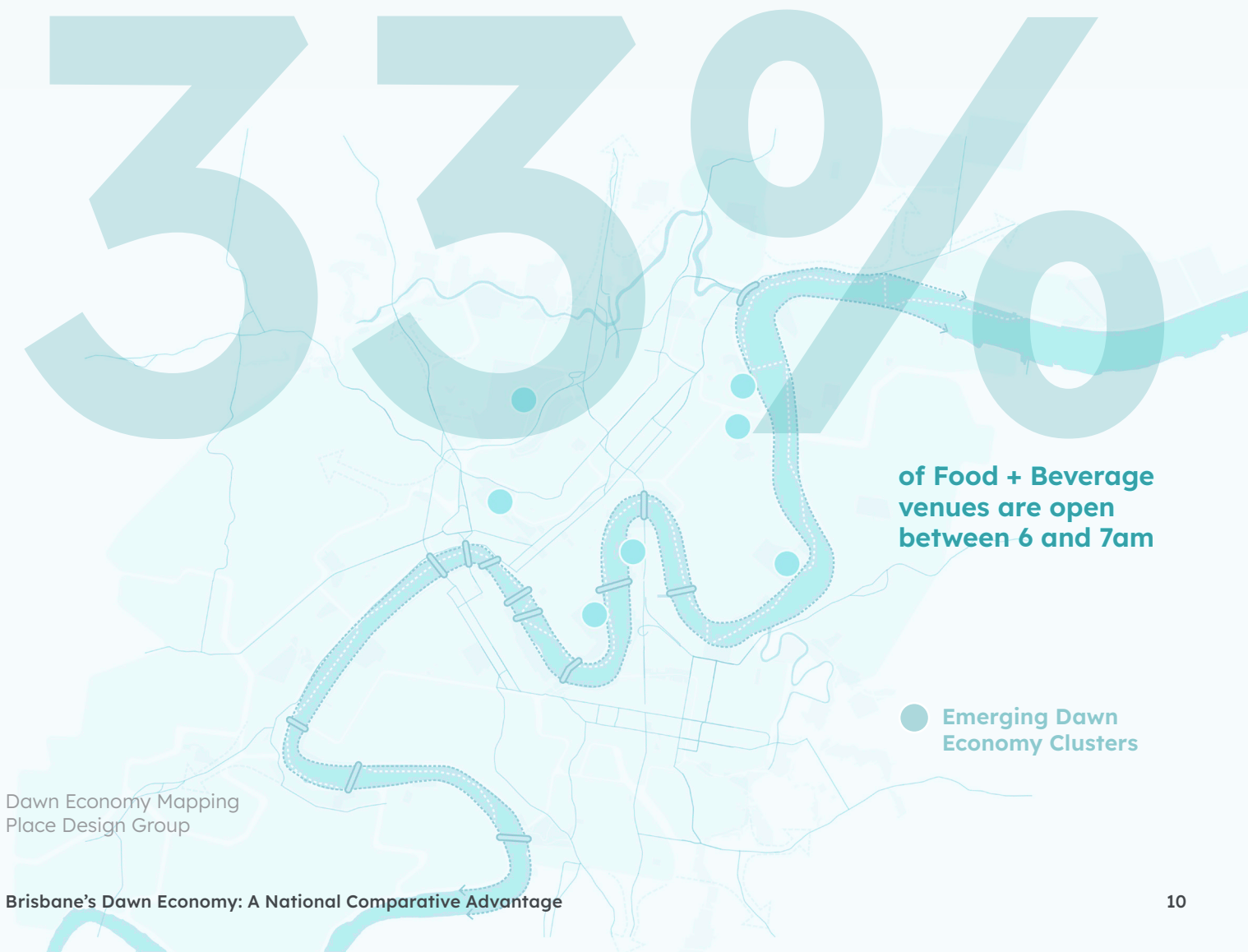
Brisbane's Existing Dawn Economy Assets

Research presented by Ingenium indicates Brisbane and Perth have Australia's most active morning hospitality economies. Almost one in three Brisbane food and beverage venues are open between 6am and 7am, highlighting the extent to which early-morning activity is embedded in the city's culture and business model (Edwards A. , Committee for Brisbane Dawn Economy Event, 2026).

Committee for Brisbane's precinct analysis identified a series of emerging dawn economy clusters including:

- Brisbane River corridors
- Kangaroo Point Cliffs
- Roma Street Parkland
- Victoria Park
- New Farm Park
- Brisbane Botanic Gardens
- James Street
- Gasworks
- Mt Coot-tha

These locations combine public space, hospitality, recreation, fitness and connectivity, forming the foundations of an interconnected dawn economy network.



The Social Value of the Dawn Economy

The dawn economy is not solely an economic phenomenon.

Early-morning activity supports social connection, community participation and wellbeing. Walking groups, riverfront recreation, cycling, outdoor fitness, social gatherings and active lifestyles all contribute to stronger community connections while activating public space.

These activities reinforce Brisbane's identity as an outdoor, healthy and highly connected city. The social benefits generated by the dawn economy are an important complement to its economic contribution and should be recognised as part of broader city-building objectives.



The Relationship Between the Dawn Economy and Night-Time Economy

Recognising the value of the dawn economy does not diminish the importance of expanding the city's night-time economy. Quite the opposite-Brisbane should embrace both.

Night-time activation remains essential to:

- Visitor appeal
- City vibrancy
- Cultural participation
- Live music
- Arts and entertainment
- Hospitality
- Tourism
- Major events

The recent Moonside Report and the Queensland Nightlife Economy Action Plan 2026-2032 reinforce the value a dedicated focus on improving the city's nightlife will have on the economy and social life of Brisbane. Short-, medium- and long-term actions have been suggested to support a more vibrant, safe and economically thriving nightlife sector.

On the other side of the coin, Brisbane's dawn economy represents a significant strength of the city, but remains underappreciated in terms of its economic and social value. The opportunity is not to choose between dawn and night, but to successfully leverage both as complementary strengths.

Policy Priorities

1

Build a narrative and identity based on the city's Dawn Economy

The Dawn economy is one element of a suite of elements attached to Brisbane's identity. This identity is built on a collection of identity pieces (attributes and assets) of which the Dawn Economy is a component. Led by the Committee for Brisbane, the city's key stakeholders should come together to build a positive, shared narrative around Brisbane's strength in the dawn economy. Rather than shying away from being an early-rising city, Brisbane should claim the title and build a brand around it- one that benefits locals and tourists.

This could include:

- Mapping Brisbane's Dawn Economy assets and precincts
- Identifying 'the best three days' from a dawn perspective
- Building a unique brand associated with the dawn hours
- Activating all cohorts in sharing the narrative- the dawn economy is inclusive
- Undertaking a local social media campaign encouraging locals to embrace the morning

2

Develop a Brisbane 24-Hour Economy Strategy

Brisbane should move beyond an exclusively night-time economy framework and adopt a comprehensive 24-hour economy strategy that recognises the dawn, day, evening and night-time economies. Within this, dedicated actions to support the dawn economy must be identified and supported.

3

Establish a 24-Hour Economy Commissioner

The existing remit of the Queensland Night-Life Economy Commissioner should be expanded to establish a dedicated 24-Hour Economy Commissioner responsible for:

- Dawn economy development
- Night-time economy development
- Precinct connectivity
- Cross-agency coordination
- Regulatory reform

4

Connect Priority Inner-City Precincts

Brisbane's dawn economy is driven by centres of activity that predominantly encourage exercise, health and well-being, along with those that support a 24-hour workforce.

Corridors that should be prioritised for better connection to drive greater economic and social activity include:

River Corridor

Howard Smith Wharves → CBD → Botanic Gardens → South Bank → Kangaroo Point

Knowledge Corridor

Herston → Kelvin Grove → Roma Street → CBD → Gardens Point → Boggo Road

Recreation Corridor

Mt Coot-tha → Victoria Park → Spring Hill → CBD → Kangaroo Point

Cultural Corridor

Fortitude Valley → New Farm → Howard Smith Wharves → QLD Cultural Centre → West End

Sports Corridor

Ballymore → Victoria Park → RNA Showgrounds → Woolloongabba → QLD Tennis Centre

5

Promote Brisbane as a Global Wellness Capital

An active and healthy lifestyle is intrinsic to Brisbane's identity. To strengthen this competitive advantage and position Brisbane as Australia's leading dawn-to-dusk wellness city, government, industry and community stakeholders should work together to embed health and wellbeing into the city's activation agenda. By investing in and promoting experiences that celebrate Brisbane's unique climate, outdoor lifestyle and riverfront setting, the city can capitalise on the growing global wellness economy while reinforcing a distinctly Brisbane identity.

This should include:

- Shared branding and collateral
- Developing a year-round program of sunrise events
- Expanding river-based activations and experiences
- Supporting flagship wellness festivals
- Growing the network of morning markets
- Developing targeted fitness tourism offerings
- Creating vibrant early-opening hospitality precincts
- Enabling more flexible early morning trading hours

6

Leverage the Brisbane 2032 Games

The Brisbane 2032 Olympic and Paralympic Games provide an opportunity to showcase year-round outdoor activity, authentically curated local precincts and a distinctive dawn economy culture. To leverage the global impact of the Games, early consideration must be given to policy and regulatory settings, precinct connections and infrastructure, and an agreed narrative and branding that reflects this.

7

Establish a 24-Hour Economy Commissioner

While the city's precincts are individually performing well, measuring how connections across and between the precincts are operating would provide valuable insights to improve overall utilisation, safety and performance.

Metrics could include:

- Visitor movement
- Dwell time
- Economic expenditure
- Active transport volumes
- Business performance
- Community sentiment
- Safety perceptions
- Cross-precinct visitation

Where To From Here

Brisbane should continue to strengthen its night-time economy. A thriving city requires vibrant experiences after dark, supported by culture, hospitality, entertainment and tourism. However, Brisbane's opportunity is larger than nightlife alone.

The city possesses a genuine and increasingly valuable dawn economy advantage that reflects its climate, geography, lifestyle and culture. Evidence suggests Brisbane has Australia's strongest pre-dawn trading economy, one of the country's most active morning hospitality sectors, and morning expenditure levels that rival evening activity.

Brisbane should not attempt to replicate any other city's model of urban activation. Brisbane's advantage lies in being Australia's leading dawn-to-dusk city, with the potential to be a globally recognised centre of health and wellbeing.

By embracing the city's strengths and creating a narrative to support further investment and activation, Brisbane will stand out globally as an authentic, thriving, outdoor city. Importantly, this narrative should form part of a broader effort to better articulate Brisbane's unique attributes, assets and identity. Developing a clear and compelling Brisbane identity that reflects the city's lifestyle, natural advantages, innovation capacity and cultural character will be critical to attracting investment, talent, visitors and future opportunities.

From here, the Committee for Brisbane will work with government and industry stakeholders to progress the above-listed policy priorities to maintain and build momentum around the city's role as a global leader in morning activity. Looking ahead, there is also an opportunity to undertake a more comprehensive exploration of Brisbane's identity and competitive strengths, potentially through a future subcommittee or dedicated body of work, to further strengthen the city's positioning on the national and global stage.



Brisbane's Dawn Economy

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