

# DELTIC NIGHT INDEX

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## Peter Marks, Chief Executive, The Deltic Group

Our 11<sup>th</sup> quarterly Deltic Night Index examines the role that a night out plays in today's society. We know that young people enjoy a good night out, but this data reinforces why going out is so important to them – it provides the opportunity to bond with friends and meet new people, both of which can be difficult to do in today's busy world.

Importantly, it also gives us a snapshot of the role social media plays in their social life. Though there are a lot of similarities, the research suggests there are also some differences between Gen Z and Millennials when it comes to social media and the late night economy. As more Gen Z become adults, it will be increasingly important for night time operators to recognise and respond to these differences.

It's always good to see an increase in consumer spend, but I think what's notable here is that there is a more even spread in terms of where Brits are spending their money – for the first time we've seen a notable decline in the number of respondents that said they spend it at the pub (though it remains the most popular), and we're continuing to see an increase in spend at the cinema. I think this is reflective of the evolving mix available in the night time economy, with more well-invested destinations, which is only a good thing.

# HEADLINE FINDINGS

JUNE 2019

## THE LATE NIGHT ECONOMY

- Brits are spending an average of £70.56 on a night out, up 2.7% from £68.68 last quarter and 18.8% from £59.40 this time last year
- This is driven by an increased spend across all categories, including pre-drinks and transport
- The frequency of nights out also increased to 1.37 times per week, up from 1.2 times last year and last quarter
- Those aged 18-30 go out the most, with 73.0% saying they go out at least once a week
- For the first time there has been a noticeable decline in the number of respondents that cited the pub as the type of late night leisure they spend the most money on each month (23.9%, down from 28.9% last quarter and 26.3% last year)
- We continue to see a steady rise in the number of respondents that spend the most at the cinema each month, at 16.4%. This is up from 13.6% last year, and 14.6% last quarter
- Among 18-21 year olds clubs are the most popular option, with 28.2% saying this is the late night leisure activity they spend the most money on each month

## SOCIALISING ONLINE & IRL (IN REAL LIFE)

- Perhaps reassuringly, for 69.1% of respondents, going out and spending time with people in real life is more important than connecting with people on social media
  - Though this figure drops to 56.5% of 22–25 year olds, it is as high as 71.6% among 18-21 year olds
- As many as a quarter (25.2%) of this age group (22-25 year olds) said the opposite: that connecting with people on social media is more important to them than connecting with people in real life on a night out, compared to just 13.7% nationally and 12.5% of 18–21 year olds
- A quarter (25.5%) of Brits said that the majority of their social life takes place on a night out
- However almost the same number (23.6%) said that it takes place online / via social media
  - Perhaps unsurprisingly, this option was particularly popular with the 18-21 age group (34.2%)
- 34.4% of 22-25 year olds and 33.3% of 26–30 year olds said that they post on social media every time they go on a night out, either while they are out or the next day
  - This is compared to 20.0% nationally and just 22.3% of 18-21 year olds
- The most popular reason for posting about a night out on social media is to keep a record of their night out (45.5%)

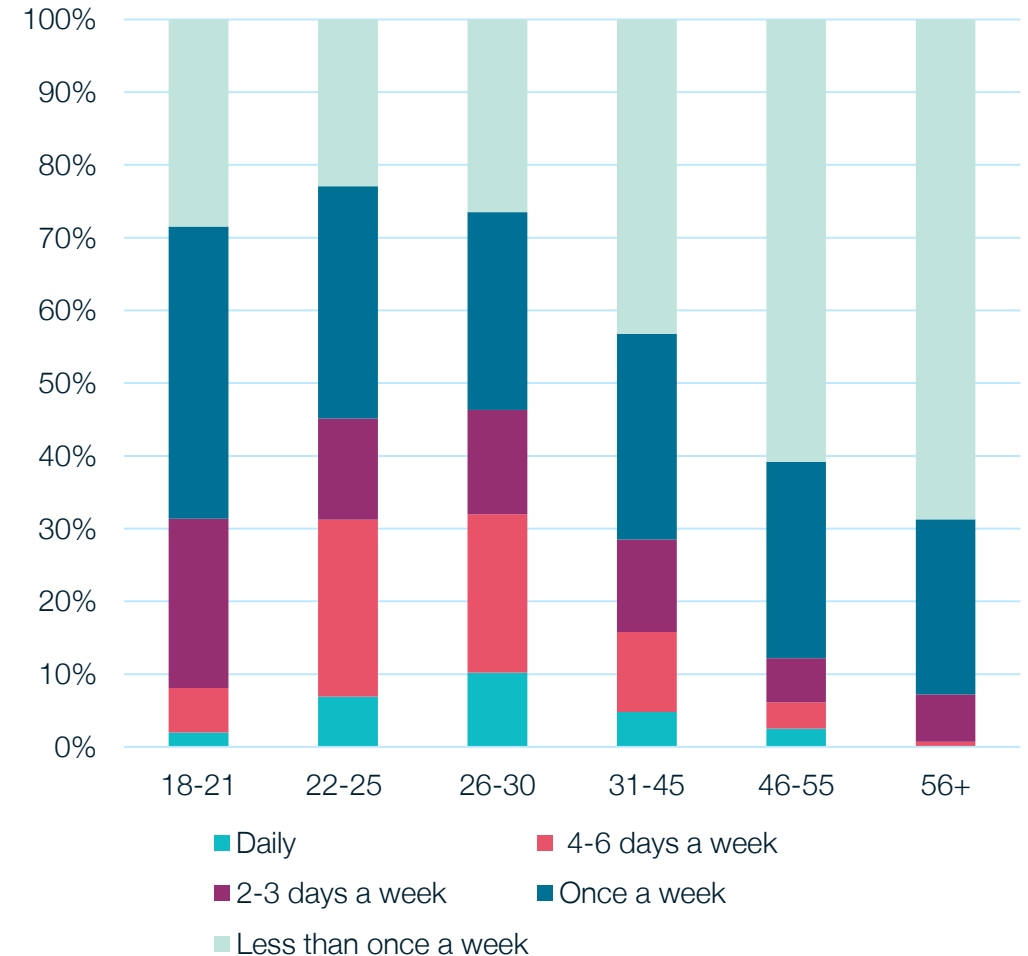
# HOW OFTEN DO WE GO OUT?

- 55.2% of respondents went on a night out at least once a week, with 13.2% saying they went out 2 – 3 times a week. This is down slightly from 56.3% last year
- However, this figure is much higher among 18-30 year olds, 73.0% of whom say they go out at least once a week.
- 23.3% of 18-21 year olds say they go out 2-3 times a week
- There is also a noticeable gender difference: 67.1% of men say they go on a night out at least once a week, compared to 44.3% of women

## REGIONAL BREAKDOWN

- Those in Bristol are most likely to go on a night out at least once a week (64.8%), followed by London (63.3%) and Glasgow (59.2%)
- The cities where people were least likely to go out at least once a week were Belfast (40.0%), and Liverpool (44.3%)

Frequency of nights out by age



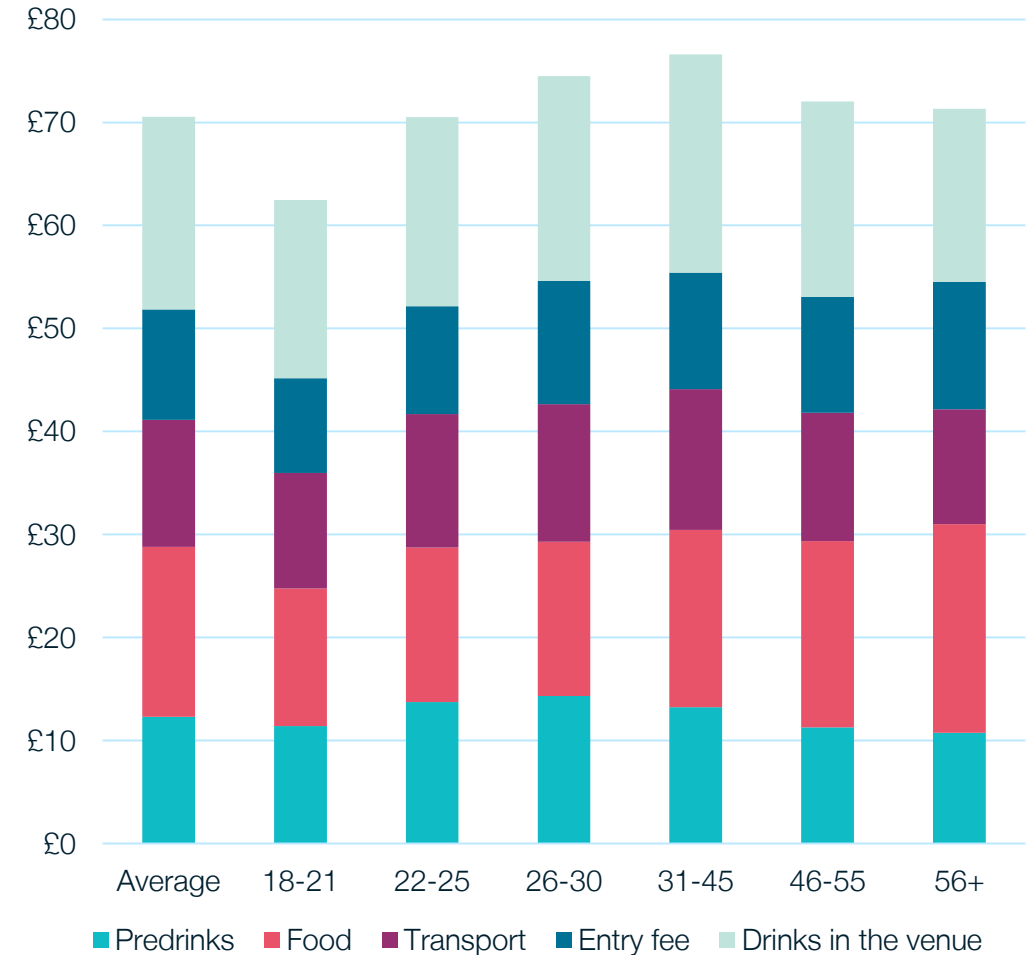
# HOW MUCH DO WE SPEND?

- Respondents are spending an average of £70.56 on a night out, up 2.7% from £68.68 last quarter and 18.8% from £59.40 this time last year
- All categories are up year on year:
  - Pre-drinks, £12.29, up 26.8% year-on-year
  - Food, £16.50, up 12.9% year-on-year
  - Transport, £12.34, up 26.3% year-on-year
  - Entry fee, £10.73, up 44.6% year-on-year
  - Drinks in the venue, £18.7, up 4.4% year-on-year
- Average spend goes up to £74.48 among 26-30 year olds, and £76.60 among 31-45 year olds

## REGIONAL BREAKDOWN

- Those in Edinburgh spend the most on a night out, with an average of £78.52
- This was followed by respondents in Glasgow (£74.70), London (£73.75), Norwich (£71.95) and Manchester (£71.37)
- Those in Bristol are likely to spend the least, with an average late night spend of £62.96, followed by Cardiff (£64.26)

Average spend on a night out by age



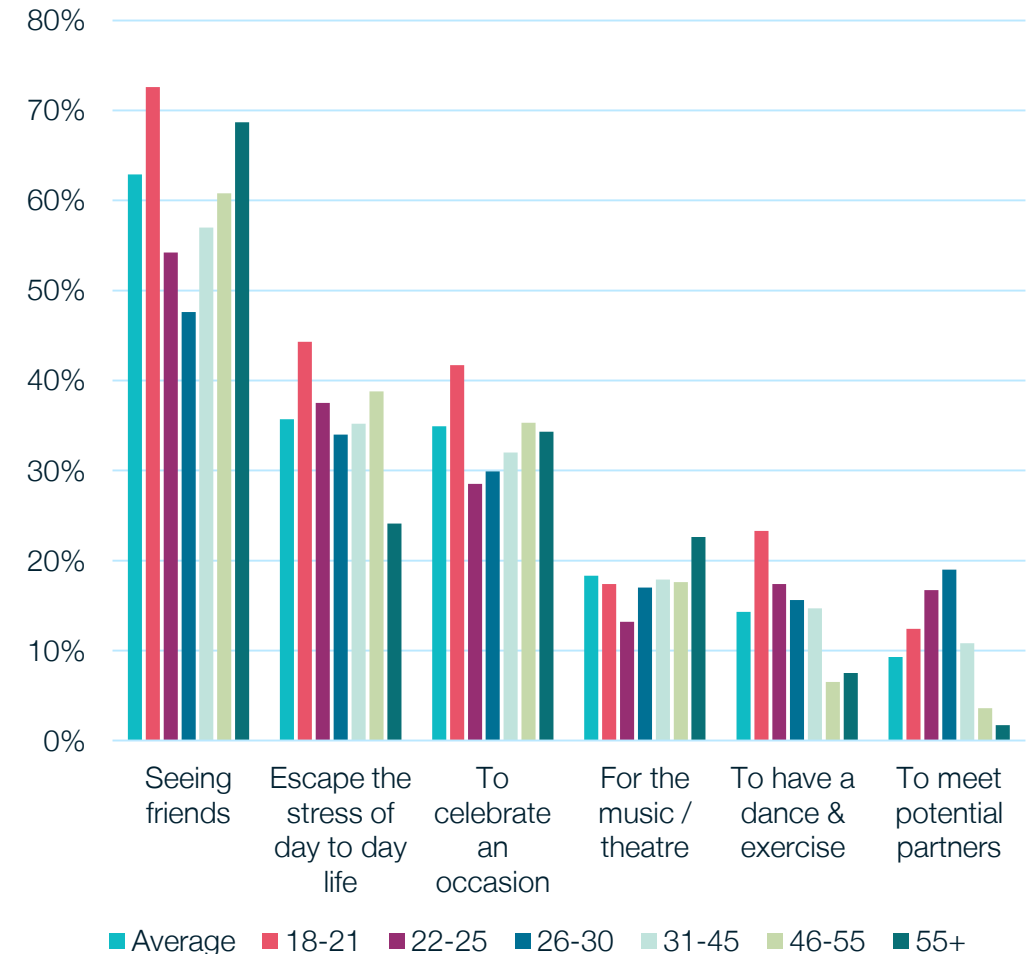
# WHY DO WE GO OUT?

- For 62.9% of respondents, seeing friends is one of the main reasons they go on a night out. Though this is down slightly from 65.9% last year, this was still the most popular reason across all age groups
- Escaping the stress of day to day life also remains a popular reason, with just over a third (35.7%) selecting this (down from 45.5% last year)
- Women are more likely to go out to celebrate an occasion (39.9%) than men (29.5%)
- Men are more likely to go out to meet a potential partner (13.3%) than women (5.6%)
- For 18-30 year olds, it seems the older you are the more likely you are to cite meeting a potential partner as one of the main reasons you go out. Whilst just 12.4% of 18-21 year olds cited this, 19.0% of 26-30 year olds did

## REGIONAL BREAKDOWN

- Seeing friends is more a more popular reason in Sheffield (74.1%) than any other city, and least popular in Cardiff (50.7%).
- Escaping the stress of day to day life is most popular in Nottingham (42.6%), and least in Norwich (24.3%)
- Celebrating an occasion is most popular in Belfast (46.7%) and least in Bristol (24.7%)
- Music & theatre is most popular in Glasgow (22.2%) and least in Southampton (7.7%)
- To have a dance & exercise is most popular in Bristol (20.0%) and least in Liverpool (10.2%)
- To meet potential partners is most popular in London (12.7%) and least in Belfast (3.3%)

Reasons we go on a night out, by age



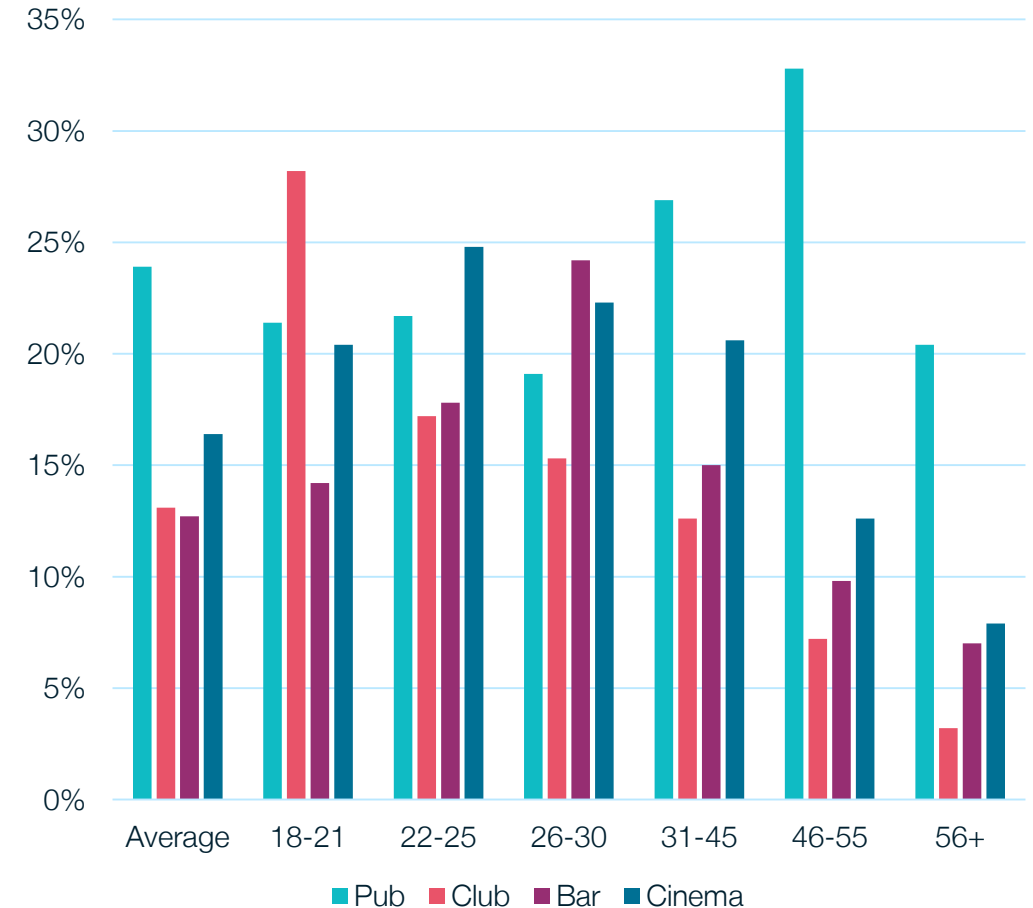
# WHERE ARE WE GOING?

- For the first time there has been a noticeable decline in the number of respondents that cited the pub as the type of late night leisure they spend the most money on each month (23.9%, down from 28.9% last quarter and 26.3% last year)
- Similarly, we continue to see a steady rise in the number of respondents that spend the most money at the cinema each month, at 16.4%. This is up from 13.6% last year, and 14.6% last quarter
- Among 18-21 year olds clubs are the most popular option, with 28.2% saying this is the late night leisure activity they spend the most money on each month, followed by the pub (21.4%)
- For 22-25 year olds there is a more even split between clubs and bars (17.2% and 17.8%)

## REGIONAL BREAKDOWN

- The majority of respondents in the following cities said they spent more money on clubs & bars than on any other late night leisure activity:
  - Belfast (34.9%)
  - Birmingham (30.3%)
  - Brighton (32.5%)
  - Cardiff (30.5%)
  - Glasgow (30.4%)
  - London (25.8%)
  - Nottingham (26.0%)
  - Norwich (21.0%)
- In comparison, pubs are the most popular venue in the following cities:
  - Bristol (33.7%)
  - Edinburgh (29.1%)
  - Leeds (26.5%)
  - Liverpool (31.0%)
  - Manchester (28.8%)
  - Newcastle (32.4%)
  - Plymouth (25.0%)
  - Sheffield (28.6%)
  - Southampton (25.3%)

Late night leisure activity respondents spend the most money on each month, by age



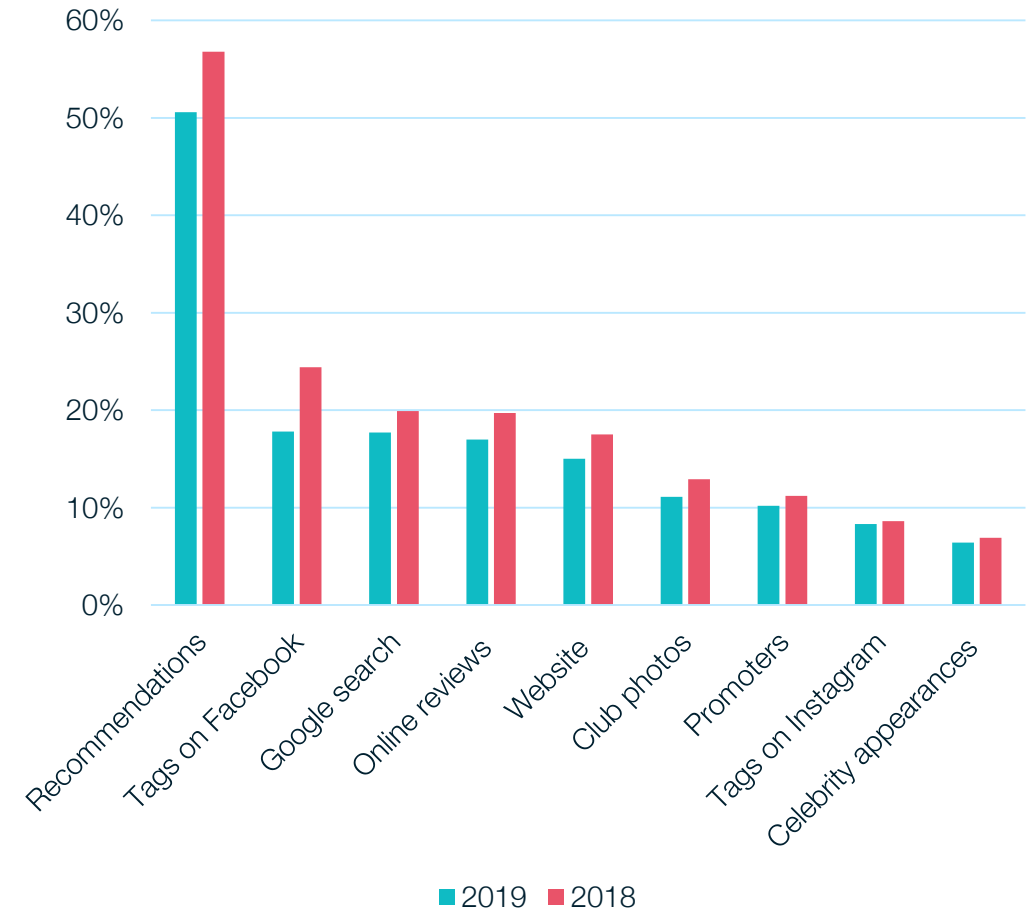
# HOW DO WE PLAN A NIGHT OUT?

- Recommendations continue to be the most influential when planning where to go on a night out, with 50.6% selecting this as a reason
- Similarly, friends being tagged on Facebook is less important (17.8% compared to 24.4% last year)
- Friends being tagged on Facebook is a more influential factor among 26-30 year olds than any other age group – whereas people tagged on Instagram carries most sway with 18-21 year olds (15.9% selected this as a reason, compared to 8.3% nationally)
- Among 18-21 year olds other key influential factors were google search (22.6%), online reviews (21.1%), promoters (19.3%) and websites (19.1%)

## REGIONAL BREAKDOWN

- Recommendations are particularly influential in Cardiff (62.3%) and least in Sheffield (46.6%)
- Friends being tagged on Facebook holds most sway in Belfast (25.0%) and least in Bristol (8.2%)
- Google search is most influential in Bristol (24.7%), and least in Cardiff (5.8%)
- Online reviews carry most influence in Leeds (20.9%) and least in Cardiff (8.7%)
- Websites are more influential in London (19.7%) than in other cities
- Club photos are most influential in Birmingham (15.3%) and least in Belfast (3.3%)
- Promoters have the biggest draw in Nottingham (13.9%) and least in Brighton (4.6%)
- People being tagged on Instagram has the most influence in Southampton (12.8%) and least in Norwich (2.9%)
- Celebrity appearances have the biggest draw in Bristol (10.6%) and smallest in Sheffield (1.7%)

Top factors that influence where we spend a night out





# SPECIAL FOCUS

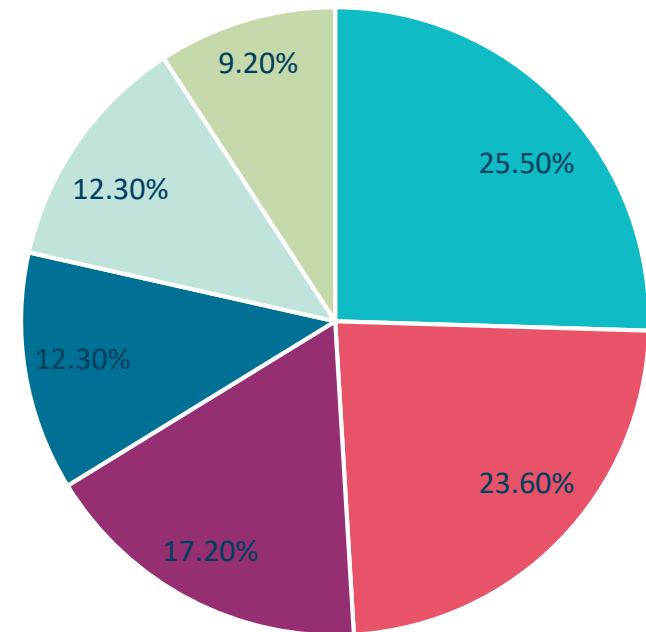
THE RELATIONSHIP BETWEEN SOCIALISING  
ONLINE AND 'IN REAL LIFE'

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# WHERE DO WE SOCIALISE?

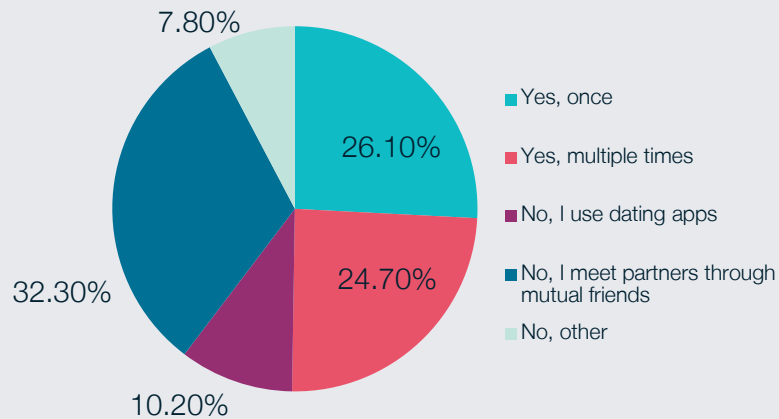
- A quarter (25.5%) of Brits said that the majority of their social life takes place on a night out – this was the most popular response
- However, almost the same number (23.6%) said that it takes place online / via social media
- Perhaps unsurprisingly, this option was particularly popular with the 18-21 age group (34.2%)
- 18-25 year olds are also more likely than other age groups to socialise through sports and hobby clubs

Where does the majority of your social life take place?



- Night out
- Online / social media
- Workplace
- Sports / social / hobby club
- Extra-curricular activity
- Other

## QUESTION: HAVE YOU EVER MET A PARTNER ON A NIGHT OUT?



- It also seems we prefer our romantic relationships to blossom 'IRL'
- Half of respondents (50.8%) said they have met a partner on a night out, with 24.7% saying they had done so multiple times
- Almost a third (32.3%) said that they meet partners through mutual friends
- Only 10.2% said they use dating apps – this rises to 16.3% among 26-30 year olds

# WHAT DO WE VALUE MORE – ONLINE, OR IRL?

**“Going on a night out and spending time with people in real life is more important to me than connecting with people on social media”**

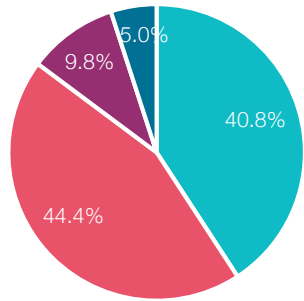
- 69.1% of all respondents somewhat agree or strongly agree that going out and spending time with people in real life is more important than connecting with people on social media
- However, this figure drops considerably to 56.5% among 22-25 year olds
- There was also a considerable difference between men and women. Whilst 75.3% of women agreed with the above statement, only 62.5% of men did

**“Connecting with people on social media is more important to me than connecting with people in real life on a night out”**

- As many as a quarter (25.2%) of 22-25 year olds agree that connecting with people on social media is more important to them than connecting with people in real life on a night out
- This is compared to just 13.7% nationally and 12.5% of 18-21 year olds
- Men were also more likely to agree with the above statement – 19.0%, compared to 8.7% of women

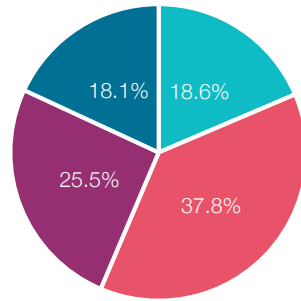
# HOW IMPORTANT IS A NIGHT OUT FOR...

Bonding with friends



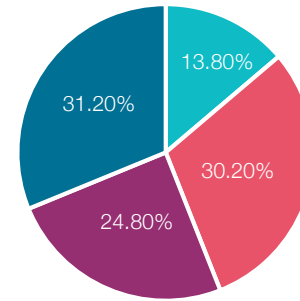
55.2% of 18-21 year olds cited this as very important, considerably higher than most other age groups (the average was 40.8%)

Growing your social circle and meeting new people



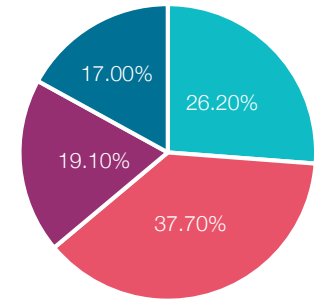
65.1% of 18-30 year olds cited this as very or somewhat important, compared to just 50.1% of those aged 31 or older

Meeting potential partners



There was little discrepancy between ages, though 22-25 year olds were most likely to say this was very or somewhat important (55.4%)

Your romantic relationship



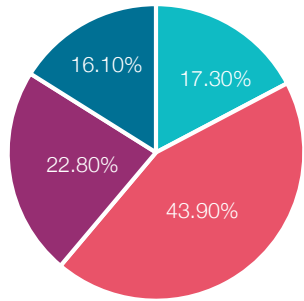
The majority of people said a night out was somewhat or very important for their relationship (63.9%) – especially those aged between 26 and 45

■ Very important    
 ■ Somewhat important    
 ■ Not very important    
 ■ Not important at all

Note: Figures have been recalculated to exclude N/A responses

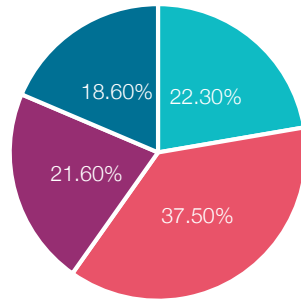
# HOW IMPORTANT IS A NIGHT OUT FOR...

Bonding with colleagues



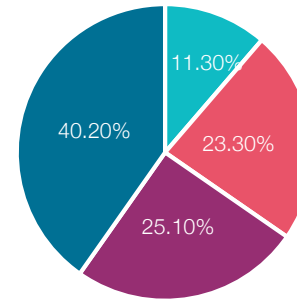
This was most important among 22-25 year olds, with 70.0% citing it as very or somewhat important

Take a break from social media & technology



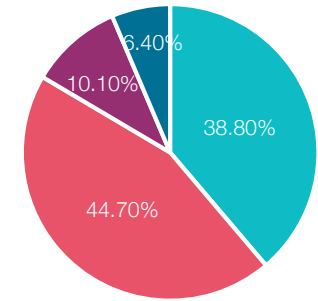
The results were relatively similar across the age groups, except among 22-25 year olds, where 74.8% said it was very or somewhat important to take a break – compared to the national average of 59.8%

Sharing your experience on social media



Again, the only age group that had a drastically different response to the others was 22-25 year olds, where just over half (52.6%) said this was very or somewhat important, compared to the 34.6% average

Reducing stress and relaxing



There was very little difference here between age groups, however a higher percentage of women (87.3%) said it was very or somewhat important than men (79.2%)

■ Very important   ■ Somewhat important   ■ Not very important   ■ Not important at all

Note: Figures have been recalculated to exclude N/A responses

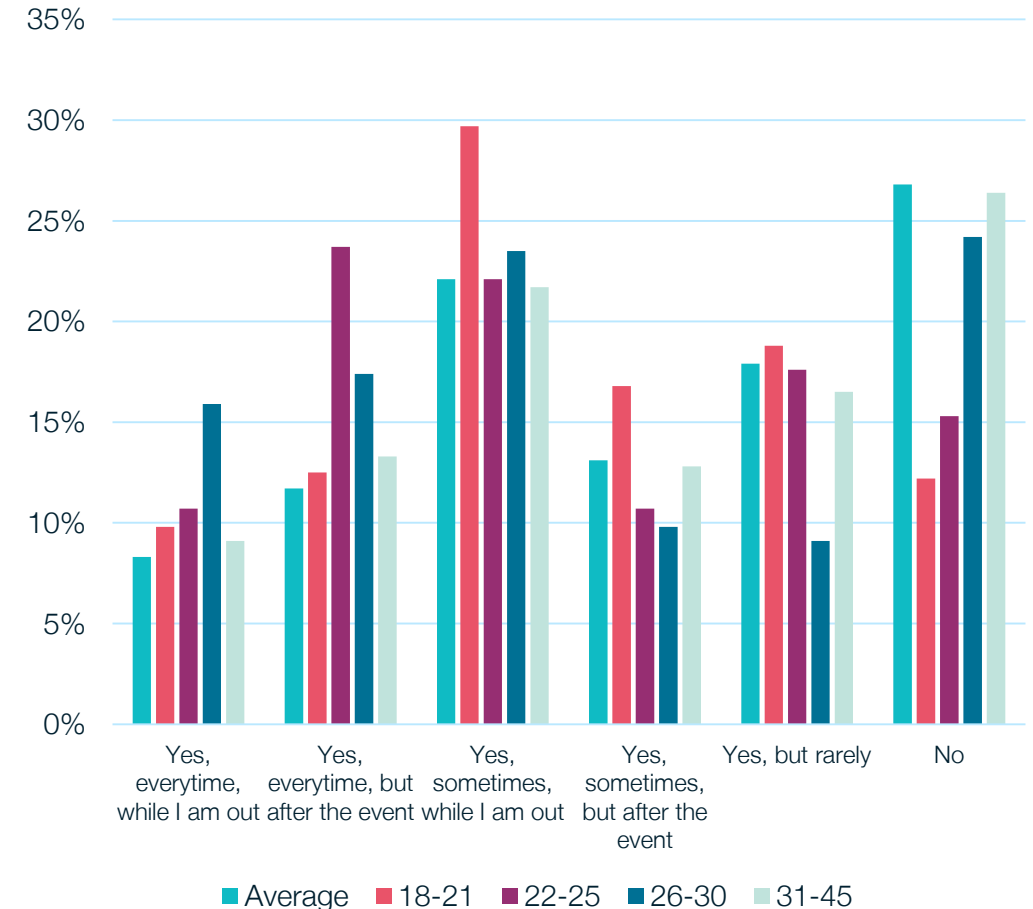
# HOW MANY OF US POST ABOUT OUR NIGHT OUT ON SOCIAL MEDIA?

- 20.0% of respondents post about their night out on social media every time they go out, while 35.2% sometimes do
- 17.9% of respondents rarely post about their night out on social media, and just over a quarter (26.8%) do not
- Women are more likely to post about their night out than men, with only 23.1% of women saying they never do compared to 30.7% of men

## AGE BREAKDOWN

- 22.3% of 18-21 year olds said that they post about their night out on social media every time, while 46.5% said they sometimes do
- In comparison, the percentage of 22-25 year olds post every time goes up to just over a third (34.4%), while 32.8% sometimes do
- 26-30 year olds are most likely to post on social media about their night out whilst they are out, with 15.9% saying they do this every time
- Perhaps unsurprisingly, the older you are, the less probable it is you will post on social media about your night out. 12.2% of 18-21 year olds said they never do, as did 15.3% of 22-25 year olds, 24.2% of 26-30 year olds, 26.4% of 31-45 year olds, 33.2% of 46-55 year olds and 55.8% of those aged 56 and above

Who posts about their night out on social media, and when, by age



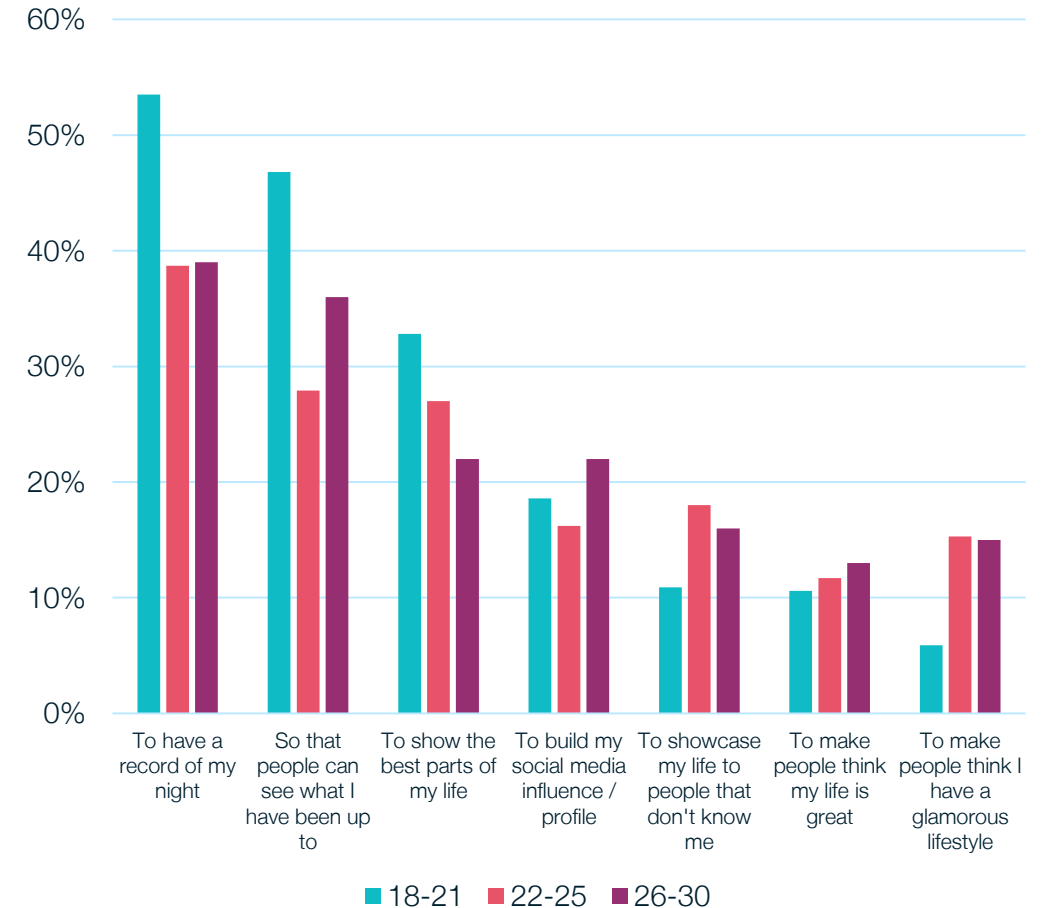
# WHY DO WE POST ON SOCIAL MEDIA?

- 73.2% of respondents said they either sometimes, always or rarely post about their night out on social media. The most popular reason for this, across all age groups, was so that they had a record of their night (45.5%)
- 22-25 year olds are more likely than other age groups to post on social media to showcase their life to people that don't know them – 18.0%, vs. 16.0% of 26-30 year olds and 10.9% of 18-21 year olds
- Meanwhile, 22-25 year olds are least likely to use social media to show people what they have been up to (27.9%, compared to the average of 38.7%)
- 26-30 year olds are more likely than other age groups to post in order to build their social media influence and profile (22.0%)

## ...AND WHY DON'T WE

- 26.8% of respondents said they do not post about their nights out on social media
- The main reasons for this were:
  - They don't like to share every detail of their lives (49.9%)
  - They're just not interested in social media when they go out (41.7%)
  - It doesn't occur to them (28.0%)
  - They think the amount people use social media is unhealthy (21.9%)

Why people post about their night out on social media



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