



 **ELTIC** NIGHT INDEX
GROUP

October 2016

#DelticNightIndex

PETER MARKS, CHIEF EXECUTIVE, THE DELTIC GROUP

Despite recent news of club closures and reports on the decline of the late night economy, The Deltic Night Index Report shows us that the UK's night life is thriving, and that going out is still very much on the agenda.

Whether it's to see our friends or just to have a dance – it seems that as a nation we still love a night out! Our data shows that nearly 40% of Brits have a late night out once a week and 72% of 18-21 year olds go out once a week or more. Clearly, there is still a need for late night venues on the UK's high streets.

Importantly, and this is something I personally feel strongly about, it is vital that local councils engage with investors, leisure operators, transport providers and local residents to ensure that all interests are catered for. Without doubt, at the heart of every great town or city is a great night time economy as the numbers show. The late night economy (all activity that happens between 6pm and 6am) is responsible for one third of a town centres' turnover*, with clubs acting as the cornerstone for the late night experience. Without a night time economy, venues and town centres have sadly too often become ghost towns.

A shift we have seen, and one that is backed by the data, is that clubbing now encompasses a broader, more inclusive and interactive experience. It's less about how much you drink – instead clubbers are looking for great entertainment, value and a good time with their friends. Another interesting trend that we have seen have is an increased awareness among clubbers of their health and wellbeing – again this is reflected in the research, with a quarter of 18-30 year olds see clubbing as a good form of exercise.

The study is compelling evidence to what've we always felt was the case – as a nation, we love a great night out and, importantly, we're willing to pay, if the offer is right. As a quarterly report, I look forward to seeing what the data also reveals over time. I hope that its findings are useful for those operating in the late night economy. As a sector, we must work together to ensure that we continue to support and invest in our future.

*[ALMR Late Night Manifesto report](#)

PHILIP KOLVIN, QC, LICENSING LAWYER AND AUTHOR 'MANIFESTO FOR THE NIGHT TIME ECONOMY'

Point to any great town or city and I will show you a great night time economy. It is one of the main reasons why people choose to settle locally, and is the place where so many things in which Britain excels – music, fashion, media and tech – are catalysed. It is not only good business but good town planning to understand the drivers for people to use the night time economy, how they use it and what they spend. This new index is therefore to be welcomed.

The figures confirm some things which we may have suspected, for example that the popularity of pubbing and clubbing are, respectively, proportionate and inversely proportionate to one's age, and that people like to go on nights out in large groups as a means of seeing their friends. But they also reveal things that we may not have suspected. Even young people can be persuaded to spend money on food if the offer is right. The power of personal recommendation exceeds even the mighty internet in influencing choice of destination. And even older people go on late nights out at least once a fortnight, and when they do their spending power matches that of their children.

From this first set of data, the message for entrepreneurs and policy makers is pretty clear. Concentrate on who is not coming in as well as who is: if you capture them you will be creating new markets rather than dividing up existing markets. Alcohol is a part of a great night out: rarely the point of it. And provide for all ages and tastes. After all, no-one is too old to enjoy a great night out with their friends.

I congratulate Deltic for embarking on this research and look forward to further enlightenment to come.

[Manifesto for the Night Time Economy](#)

HEADLINE FINDINGS OCTOBER 2016

The late night economy

- The first Deltic Night Index reveals that a late night out is still very much on the agenda
- Nearly 40% of Brits go on a late night out once a week, with 72% of 18-21 year olds go out once a week or more
- Interestingly the data shows that 15% of Brits spend more money in clubs each month than on other late night activities, demonstrating the appeal of clubbing is not limited to the younger age groups
- Escaping stress is cited as one of the top reasons for a late night. Almost half of 18-21 year olds cite escaping the stress of life as a reason they go out
- A quarter of 18-30 year olds cite their main reason for a night out is to have a dance and exercise
- Despite the rise of social media platforms, 58% of people still choose where to go on a late night based on recommendations
- Many believe that the rise of online dating apps, like Tinder and Bumble, will contribute to the decline of the late night economy however the data has revealed that the 66% people stated seeing friends as their main reason for late night out

Halloween and the late night economy

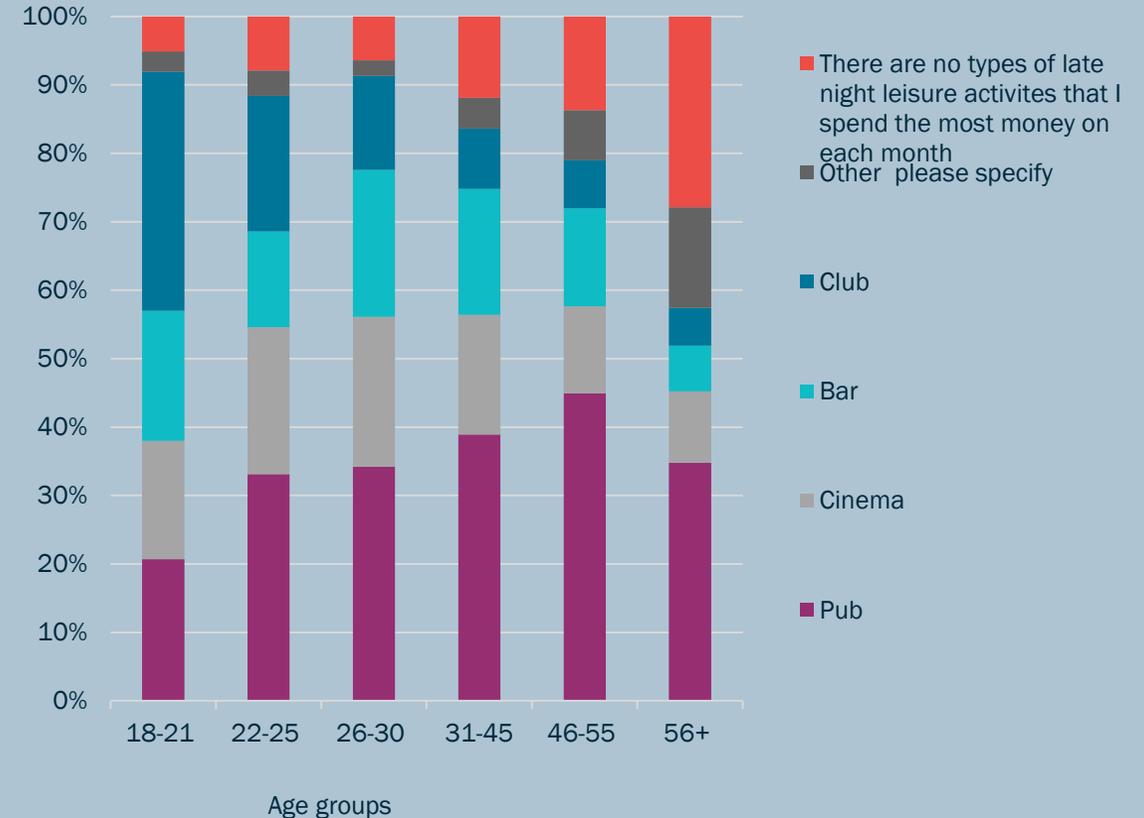
- When it comes to Halloween the research reveals that one third of 18-25 year olds plan to celebrate Halloween in a club
- Interestingly, nearly every age group revealed they choose the club on the night itself, with only 10% of 18-30 year olds planning to celebrate the night at pre-booked club
- Unsurprisingly, fancy dress is a big draw on Halloween, with more than a quarter of respondents saying they look for a fancy dress theme when choosing a venue. This is higher amongst women than men

LATE NIGHT ECONOMY SPENDING BY LATE NIGHT ACTIVITY

The figures confirm that clubbing is the most popular late night activity for 18-21 year olds. However, interestingly the data also shows that 15% of Brits spend more money in clubs each month than on other late night activities, demonstrating the appeal of clubbing is not limited to the younger age groups.

- Over a third (35%) 18-21 year olds stated they spend the majority of their late night budget in clubs. This is compared to just 1 in 7 (14%) of 26-30 year olds
- Over a third (34%) of Brits spend more money in pubs each month than on other late night activities
- Over 1 in 5 (21%) 18-21 year olds spend the most money in pubs each month
- This is compared to over a third (34%) of 26-30 year olds and a third (33%) of 22-25 year olds, who spend most money each month in pubs
- 1 in 6 (16%) Brits spend most money at cinemas each month
- Over 1 in 7 (15%) Brits spend most money in bars each month. Amongst 18-21 year olds, this increases to almost a fifth (19%)
- Over 1 in 7 (15%) Brits spend the most money in clubs each month

Late night expenditure broken down by activity and age groups

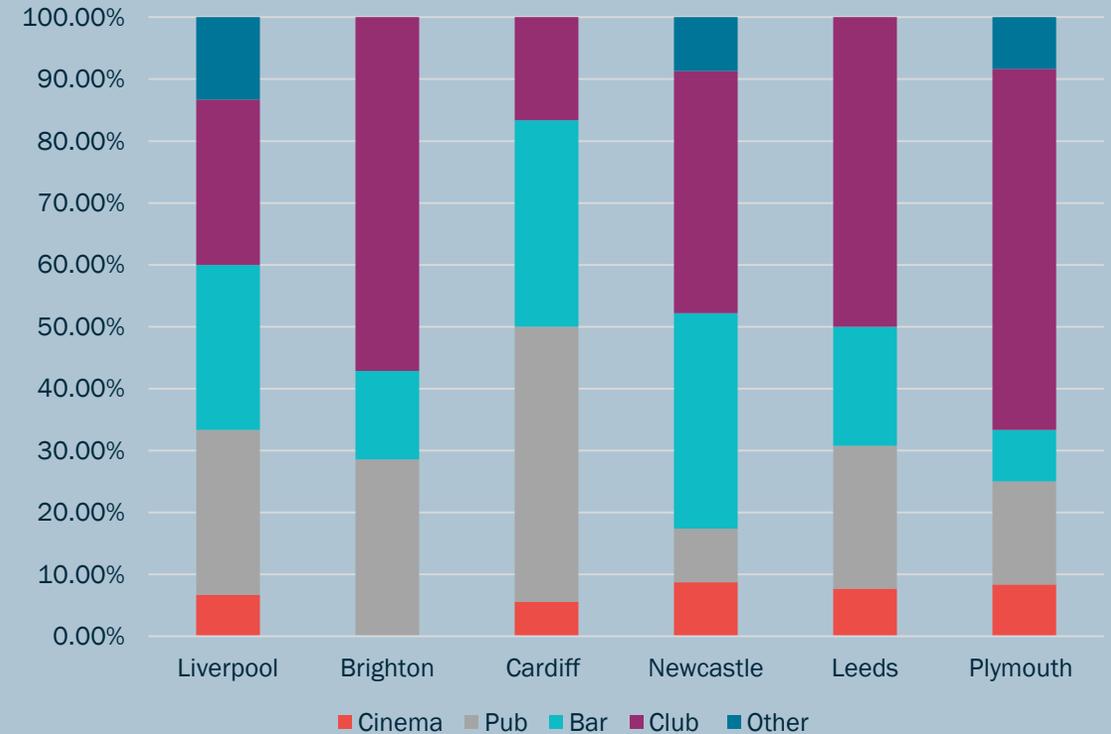


LATE NIGHT ECONOMY SPENDING BY LATE NIGHT ACTIVITY: REGIONAL BREAKDOWN

The data reveals that the type of late night leisure that people spend the most money on each month varies quite a lot from city to city.

- In Edinburgh, 55% of people spend most of their money in clubs; in Brighton 50% do, and in Plymouth 63% do
- This compares with Liverpool, where there is an even split across spending in clubs, bars and pubs (22% each)
- People in Bristol are least likely to spend their money at a club, with just 22% selecting this – though that is still one fifth

Late night expenditure by activity broken down by city



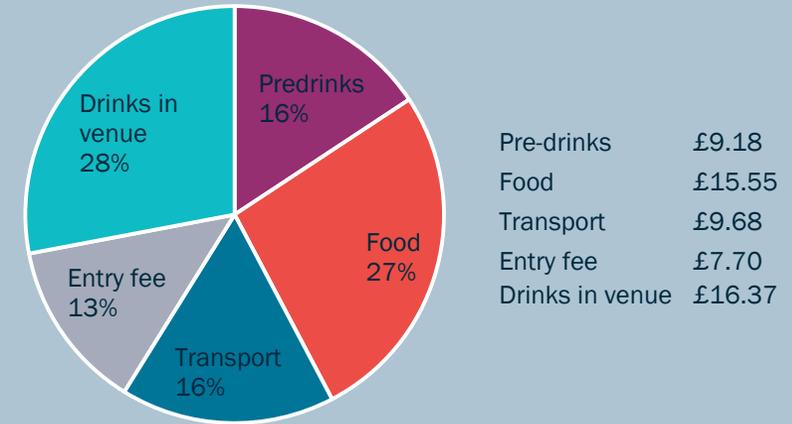
**Please note that only the cities with highest late night spend are included in the graph*

LATE NIGHT SPEND MIX

The data has reveals that the vast majority of consumers are happy to part with their cash on a late night out, with the majority spending their money on food and drinks in a late night venue.

- Brits spend £58 or over on an average late night out
- The majority of consumer spending is on food and drinks in a venue. This makes up over 50% of total spend on a late night out
- Younger people can be persuaded to spend money on food if the offer is right
- 68% of all respondents are willing to spend up to £10 for entry into a late night leisure venue, demonstrating that a vast majority of people of all ages are willing to pay for a good night out
- The age group that spends the most on a late night out is 26-30 year olds – spending on average £66.91

Late night spending by category



Breakdown of spend on a late night out by age



LATE NIGHT SPEND MIX: REGIONAL BREAKDOWN



Pre-drinks

Brighton = £7.50
 Bristol - £8.95
 Edinburgh - £12.29
Leeds - £13.58
 Southampton - £5.53



Food

Birmingham - £10.87
Edinburgh - £11.67
 Liverpool - £6.81
 London - £11.92
Plymouth - £5.7



Transport

Birmingham - £10.56
Brighton - £7.13
 Cardiff - £7.67
 Liverpool - £7.61
 London - £10.42
 Manchester - £9.68



Entry fee

Birmingham - £8.5
Brighton - £5.14
 Glasgow - £6.13
 Leeds - £6.38
London - £9.76
 Norwich - £7.89



Drinks in the venue

Cardiff - £10.94
Glasgow - £18.82
 Leeds - £17.19
 Newcastle - £11.26
 Plymouth - £17.91
 Southampton - £12.94

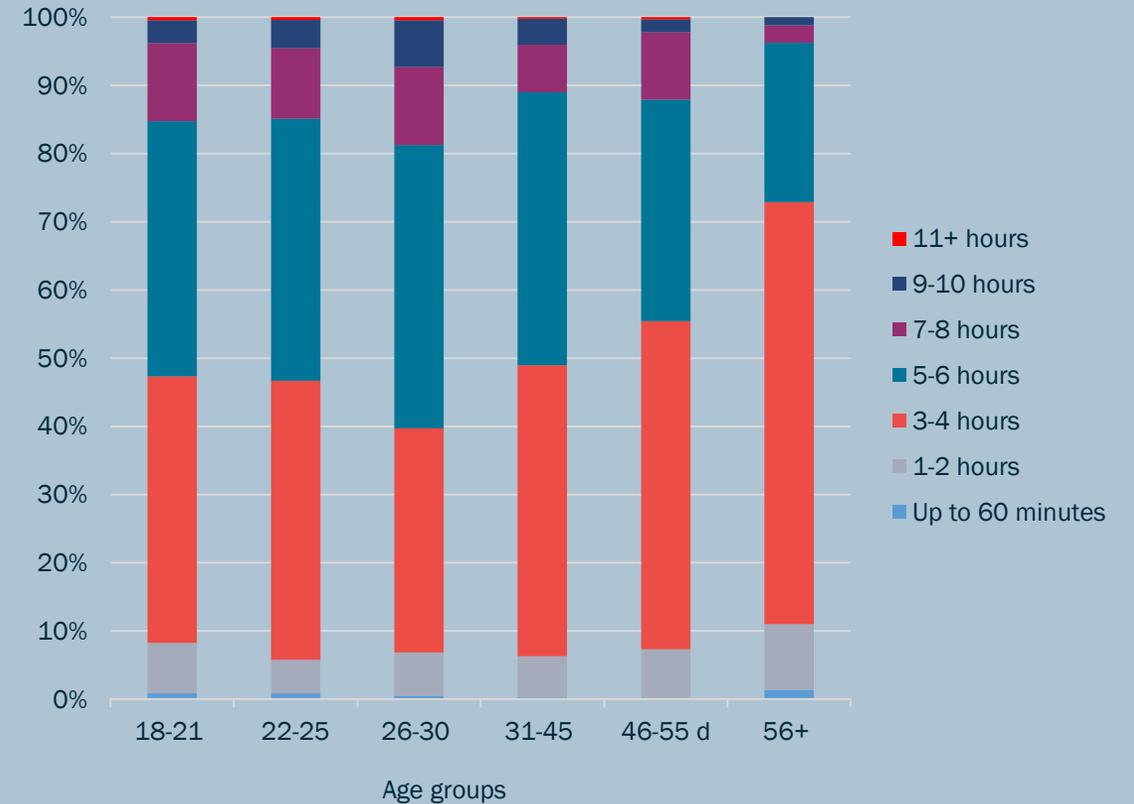


LATE NIGHT TIMINGS

There is a high demand for a variety of late night leisure venues, which is consistent across all ages, demonstrating the need for late night venues on the UK's high streets.

- 88% of respondents stay out for up to 6 hours
- Over a third of 18-21 year olds (34%) don't leave the house until between 10pm and 12am
- For 2 in 5 (39%) 18-21 year olds, an average night out lasts 3-4 hours
- For just over 2 in 5 (41%) 22-25 year olds, an average night out lasts 3-4 hours

How long does an average night out last?



LATE NIGHT TIMINGS: REGIONAL BREAKDOWN

- People from Birmingham and Newcastle are more likely to leave the house later, with 25% and 30% respectively saying they will leave the house between 11pm and 12am
- This compares to Nottingham, where 30% will leave the house between 8pm and 9pm
- In Plymouth, an overwhelming majority (45%) leave the house between 10pm and 11pm for a late night out
- This compares to Sheffield, where over a third (37%) will leave the house between 9pm and 10pm



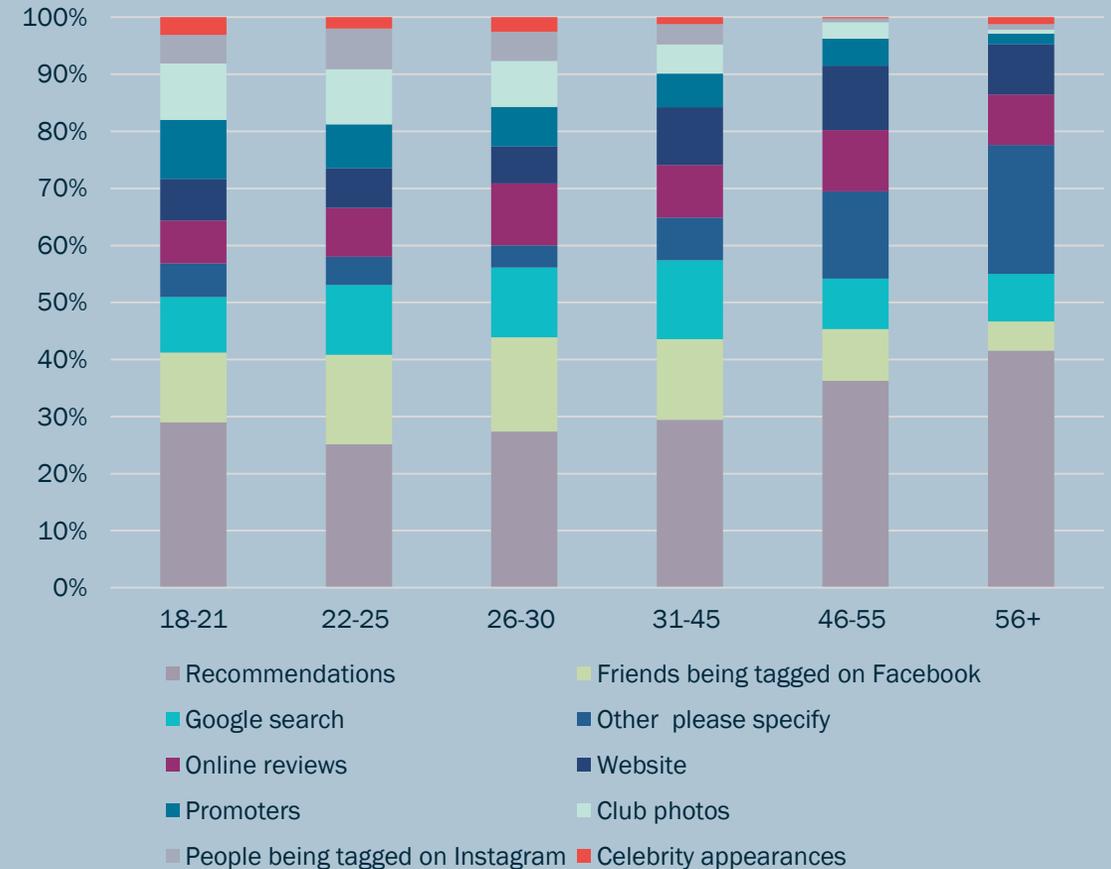
PLANNING A LATE NIGHT

The standout winner here is recommendations. Despite living in an increasingly digitally oriented world, the data shows that word of mouth is still the most important factor that people take into account when choosing where to go out.

- The top 5 ways respondents choose where to go when planning a night out are:
 - Recommendations (58%)
 - Friends being tagged on Facebook (22%)
 - Google Search (20%)
 - Online reviews (18%)
 - Website (17%)
- When planning a night out, almost 2 in 3 (65%) 18-21 year olds choose where to go via recommendations
- When planning a night out, almost a quarter (23%) of 18-21 year olds choose where to go via promoters. This is compared to 17% of 22-25 year olds and 16% of 26-30 year olds
- When planning a night out, 1 in 6 (16%) 22-25 year olds choose where to go via people being tagged on Instagram. This is compared to 1 in 9 (11%) 18-21 year olds and 1 in 8 (12%) 26-30 year olds

*Limited regional variation

Factors and their importance in determining where people go on a night out

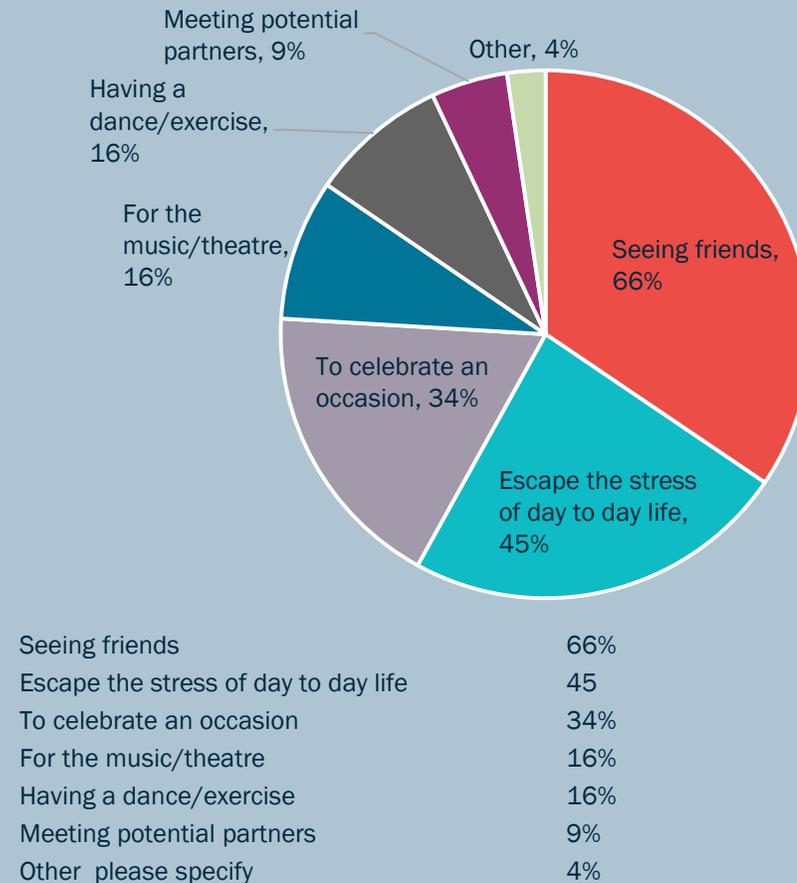


WHY DO WE GO OUT

Across all ages, seeing friends was cited as one of the top reasons people go on a night out. This figure increases the younger you are. Interestingly the data has shown that almost half of Brits (45%) go out on a late night to escape the stresses of day to day life.

- 72% of 18-30 year olds cite seeing friends as the main reason they go on a night out
- 48% of 18-21 year olds go out to escape the stress of life
- 42% of women say that a top reason for going on a night out is to celebrate an occasion. Whereas, only a quarter (25%) of men say this is a main reason
- 1 in 8 (12%) men said that a main reason for them going on a night out is to meet a potential partner, but this is true for just 1 in 14 (7%) women
- 15% of 18-30 year olds said that a main reason for them going on a night out is to meet a potential partner
- A quarter (25%) of 18-30 year olds said that a main reason for them going on a night out is to have a dance/exercise, compared to just 10% of 31+ year olds
- 1 in 20 (5%) married Brits say a main reason for going on nights out is to meet potential partners and 5% of those in a relationship agree

Top reasons Brit go out on a late night



* Participants were asked to rank in order of importance

FREQUENCY OF LATE NIGHTS

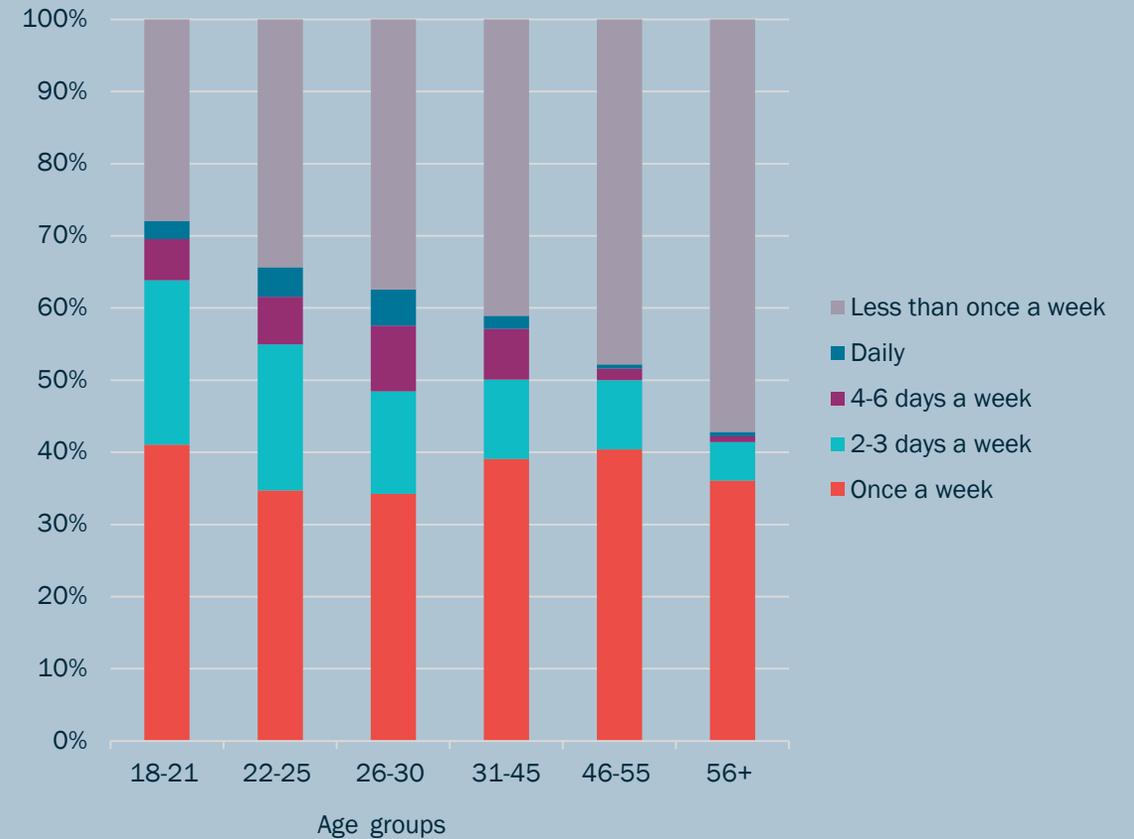
Going out is still very much on the agenda, with nearly 40% of Brits stating they go on a late night out once a week - a figure which is largely consistent across age groups.

- Nearly 40% of Brits go out on a late night out once a week
- 72% of 18-21 year olds go out once a week or more
- Just under a quarter of 18-21 year olds (23%) go out on a late night 2-3 times a week
- Nearly one-fifth (18%) of 18-21 year olds go on a late night every 2-4 weeks
- Over one third of 56+ year olds go out on a late night once a week

In the following cities, people are most likely to go on a late night out

- Newcastle 2 - 3 times a week (45%)
- Norwich - 2 -3 times a week (45%)
- Manchester - once a week (50%)
- Birmingham - once a week (41%)
- Brighton - once a week (50%)
- On average, those from Belfast and Bristol go on the most late nights out a week

Breakdown by age

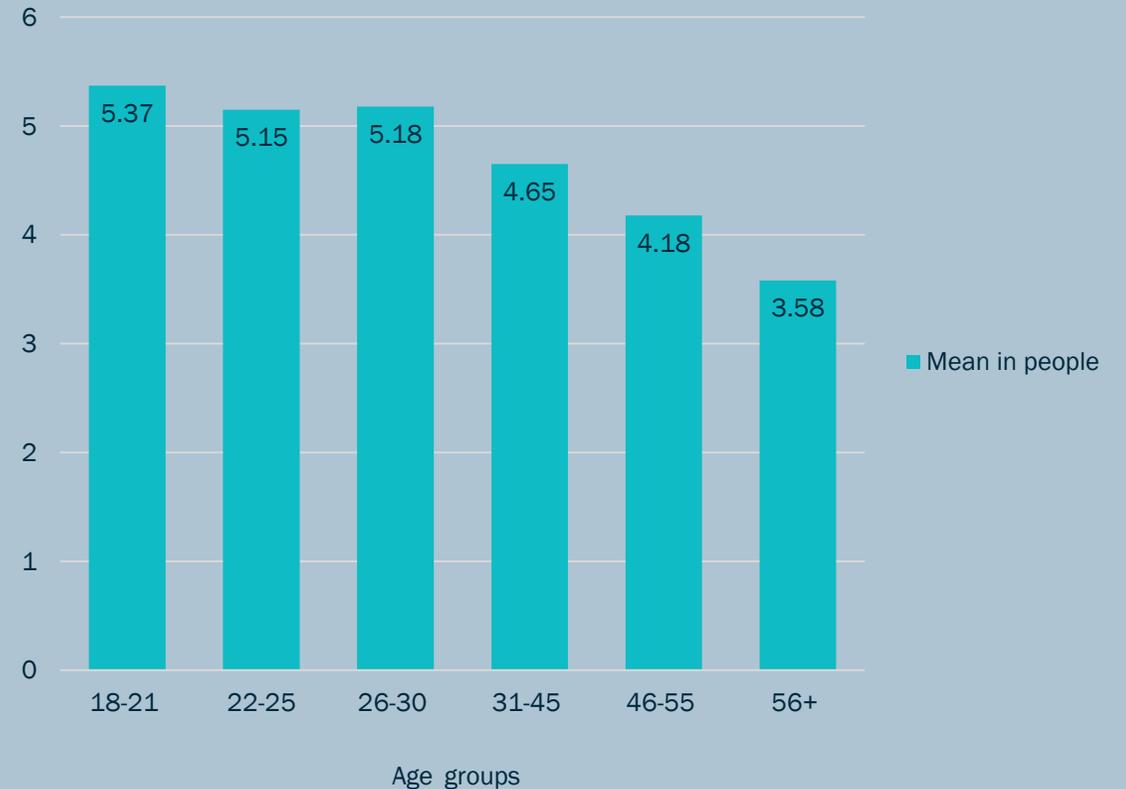


WHO DO WE GO OUT WITH ON A LATE NIGHT?

The data has shown that the younger generation prefer to go in larger groups.

- One of third of 18-21 go out in groups of 5-6
- British men, go out with on average 4 people, compared to women who go out with 5
- Brits aged 26-30 go out with on average 5 people
- More than 1 in 10 (12%) British women, go out with 7 or more people. This is compared to 28% of men that go out with 2 or less
- Just under 1 in 5 (18%) Brits aged 18-21, go out with 7 or more people. This is compared to more than 1 in 10 (12%) Brits aged 22-25 that go out with 2 or less
- These figures are largely consistent across the UK

How many people do you usually go out with*?
Average group size, split by age group



*Includes respondent

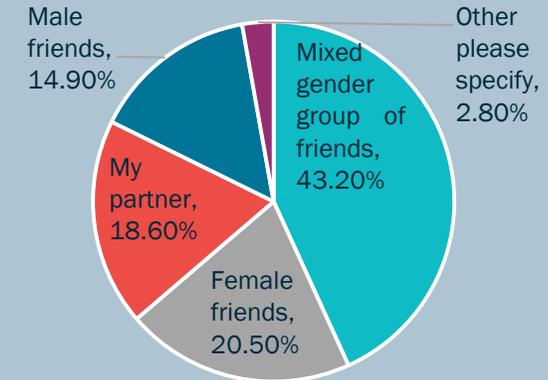
WHO DO WE GO OUT WITH ON A LATE NIGHT? BREAKDOWN

As a nation we prefer to go out in mixed gender groups. This is particularly true for the younger generation.

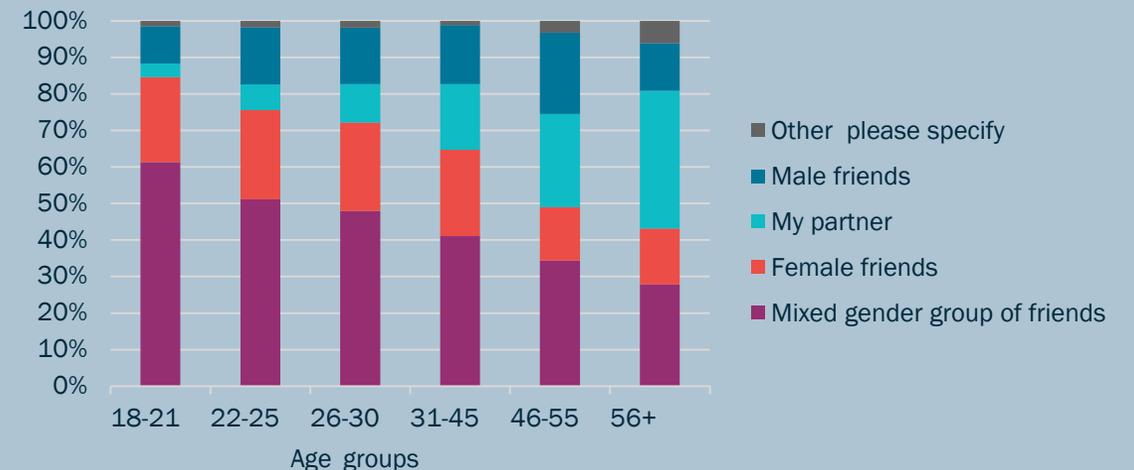
- Across the 18-21 age group, the majority go out with a mixed group or in a group of females
- More than 2 in 5 (43%) Brits that go on nights out said that they usually go out with a mixed gender group of friends
- 19% of Brits that go on nights out said when they go out they usually go out with their partner
- 3 in 10 (30%) of men that go on nights out, said they usually go out with their male friends, 32% of women also said they go out with their female friends
- Only 7% of Brits aged 22-25 that go on nights out said they usually go out with their partner. However 11% of those aged 26-30 do
- More males (6%) go on nights out with the opposite sex than females (3%)

**Limited regional variation*

Average breakdown of groups



Average breakdown of groups by ages



SAFETY

The research shows us that across all age groups there are high levels of awareness and understanding how to stay safe on a night out.

- 97% of Brits feel safe staying with their friends on a night out
- 46% of women and 12% of men don't feel safe when travelling by themselves on a night out
- More than 7 in 10 (73%) women and 2 in 5 (40%) men don't feel safe leaving their drink unattended on a night out
- 87% of Brits feel safe keeping their belongings with them at all times on a night out

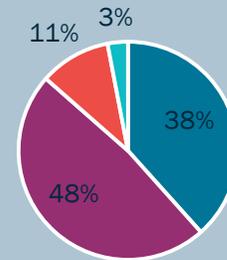
Top ten cities were people felt somewhat to extremely safe travelling by themselves on a late night out:

1. Glasgow
2. Cardiff
3. Belfast
4. London
5. Sheffield
6. Manchester
7. Leeds
8. Norwich
9. Newcastle
10. Bristol

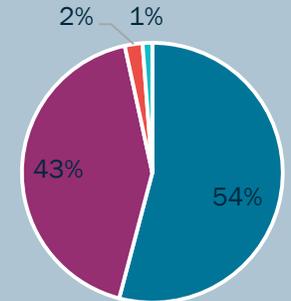
How safe we feel on a late night out?



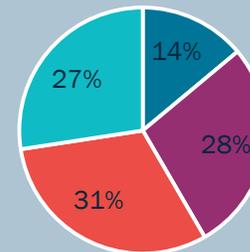
How safe do you feel keeping your belongings with you at all times?



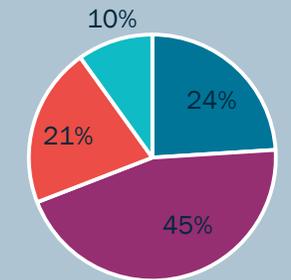
How safe do you feel staying with your friends?



How safe do you feel leaving your drink unattended?

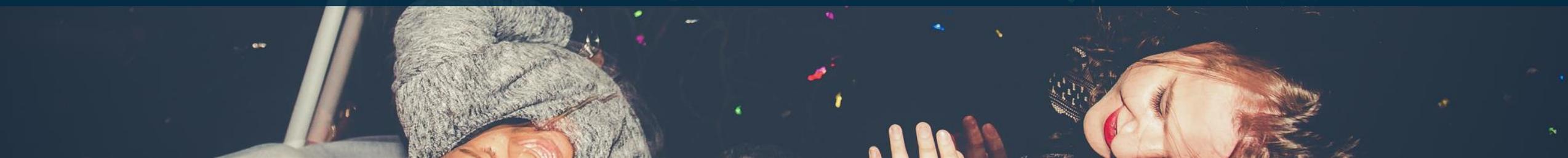


How safe do you feel when travelling on a night out?





SPECIAL FOCUS: HALLOWEEN



HALLOWEEN HIGHLIGHTS

The research has revealed that 61% of Brits plan to celebrate Halloween. The most popular late night venues to celebrate are clubs and pubs. However, the data also shows that we are a spontaneous nation with nearly every age group opting to choose which club they celebrate in on the night itself.

- One third of 18-25 year olds will spend Halloween at a club
- 10% of 18-30 year olds plan to celebrate Halloween at a pre-booked club
- 3 in 5 Brits (61%) are planning to celebrate Halloween this year
- A quarter of Brits (25%) plan to celebrate Halloween at home
- 1 in 7 (14%) Brits are not sure how they're going to celebrate Halloween this year
- 1 in 12 (8%) Brits are planning on spending Halloween at a pub
- Nearly two thirds of women (65%) are planning to celebrate Halloween this year compared to 56% of men
- Over 1 in 5 18-21 year olds (21%) are planning to celebrate Halloween at home
- Nearly 1 in 10 (9%) Brits aged 18-21 are planning on celebrating Halloween at a pub

HALLOWEEN HIGHLIGHTS: REGIONAL FOCUS

- Half of Glaswegians plan to celebrate Halloween in a club, however only 5.6% will pre-book, with others preferring to choose the club on the night
- Over a third of people in Leeds, Liverpool and London plan to celebrate Halloween in a club (36%, 35% and 35% respectively)
- 44% of people in Newcastle plan to celebrate Halloween in a club
- 22% of people in Edinburgh and one third of people in Brighton, will pre-book a club
- Across the UK, people in Sheffield are most likely to celebrate in a pub followed by Manchester and London



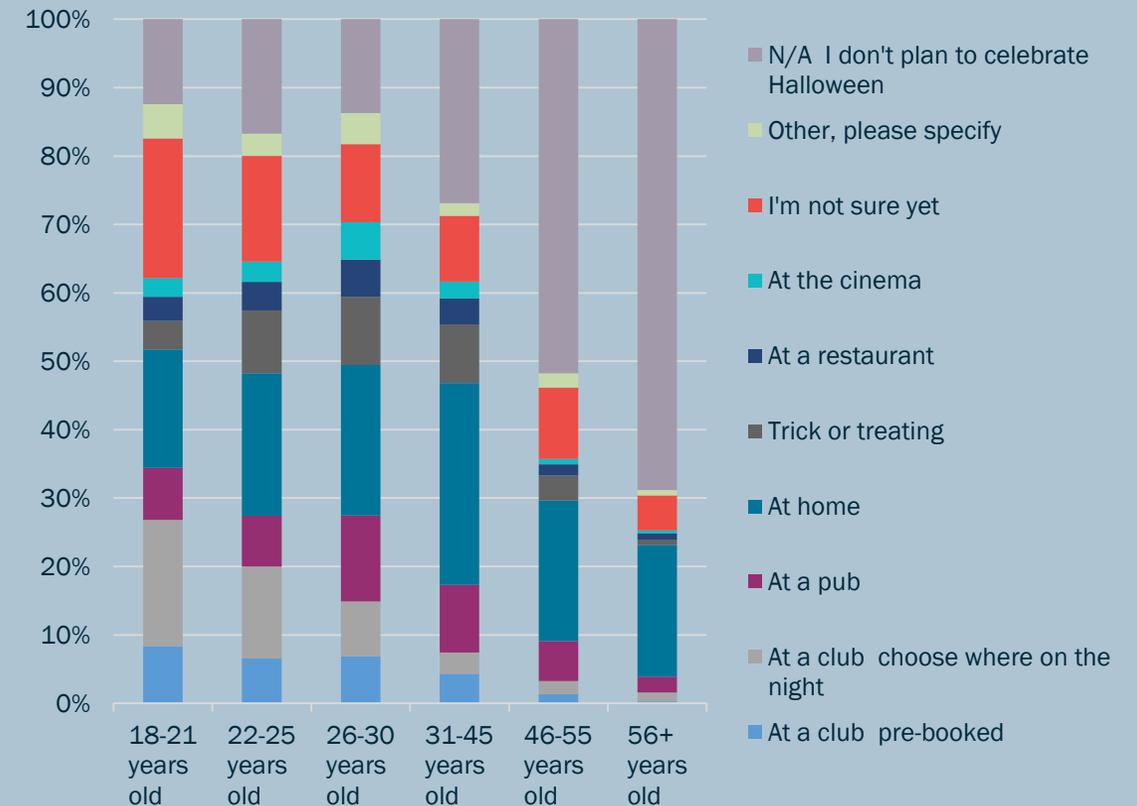
HALLOWEENS: DRIVERS OF CHOICE

Fancy dress is a big draw on Halloween, with more than a quarter saying they look for a fancy dress theme from their chosen venue (more than one third of 18-30 year olds).

Top 5 things Brits look for from a night out at Halloween

- Dressing up (25%)
 - Affordability (cheap drinks + tickets/entry) (23%)
 - Great music/entertainment (23%)
 - Somewhere close to home (15%)
 - Something for all the family (Inc. children) (15%)
- More females than males look for 'dressing up' from a night out at Halloween (30% vs 19%)
 - Nearly half (46%) of Brits aged 18-21 years old look for 'affordability' from a night out at Halloween
 - Just over 2 in 5 (43%) Brits aged 18-21 look for 'dressing up' from a night out at Halloween
 - Just over 2 in 5 (42%) Brits aged 18-21 look for 'great music/entertainment' from a night out at Halloween
 - Under 1 in 5 (18%) Brits aged 18-21 look for 'somewhere close to home' from a night out at Halloween
 - The region that looks for 'dressing up' from a night out at Halloween the most is London, with nearly a third (31%). The region that is least likely to look for 'dressing up' is the East at just under 1 in 5 (18%)

Drivers of choice
Broken down by age group



LATE NIGHT SPEND: HALLOWEEN

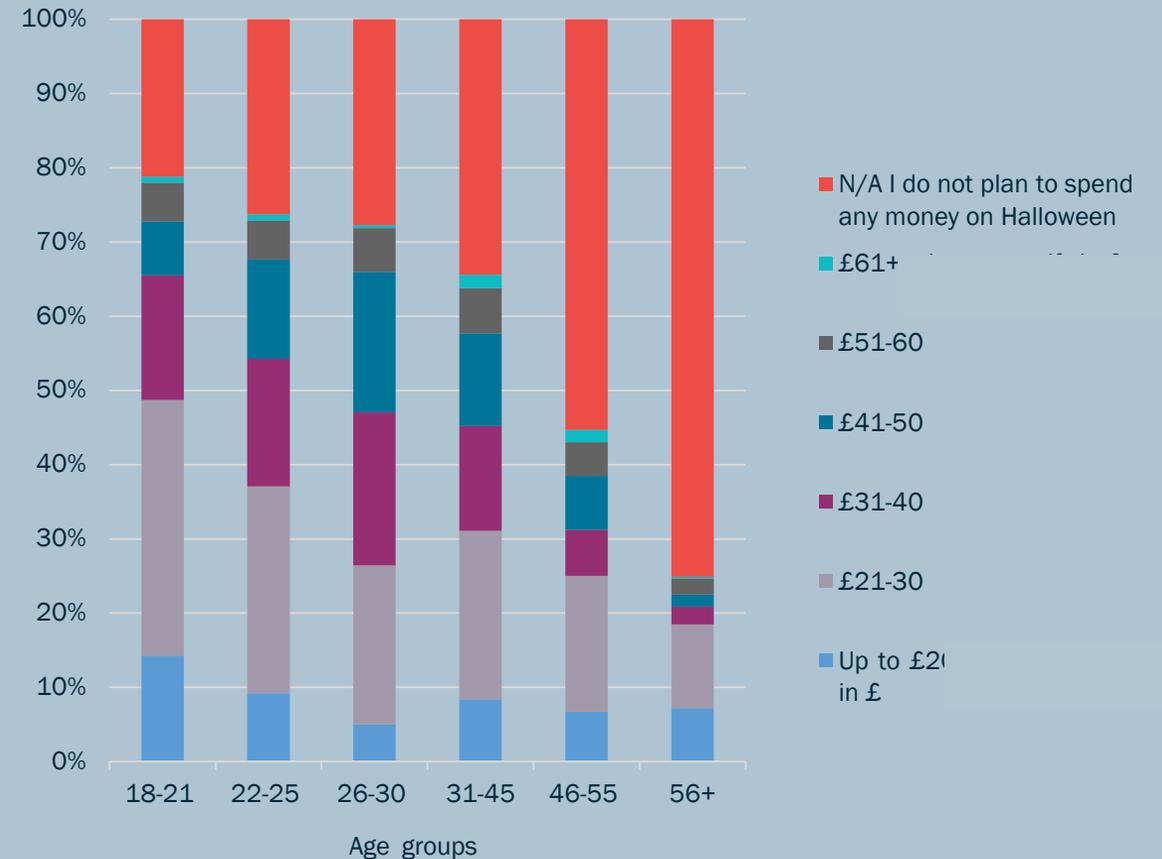
The data has shown of the people who do choose to go out on Halloween, they will spend on average £83.83, demonstrating that there is a real opportunity for leisure operators on occasions and Halloween in particular

- Brits are planning on spending an average of £83.83 on Halloween
- 56+ year olds are planning to spend the most on Halloween, with the average 56+ year old spending £121, compared to 18-21 year olds who will be spending £55.40
- Almost 1 in 10 Brits (9%) said they will be spending between £41-£50 on Halloween with 1 in 20 (5%) saying they will be spending between £51 and £60

Regional highlights

- Brits in Southampton, Birmingham and Belfast tend to spend the most on Halloween
- Meanwhile Edinburgh residents are likely to spend the least, with an average spend of £47.29
- In London, Manchester, Newcastle, Glasgow, Plymouth, Sheffield and Southampton, just over a third will spend £21-30 celebrating Halloween (35%, 38%, 36%, 38%, 35% 35% and 38% respectively)

Late night spend on Halloween broken down by age groups



PLANNING A LATE NIGHT FOR HALLOWEEN

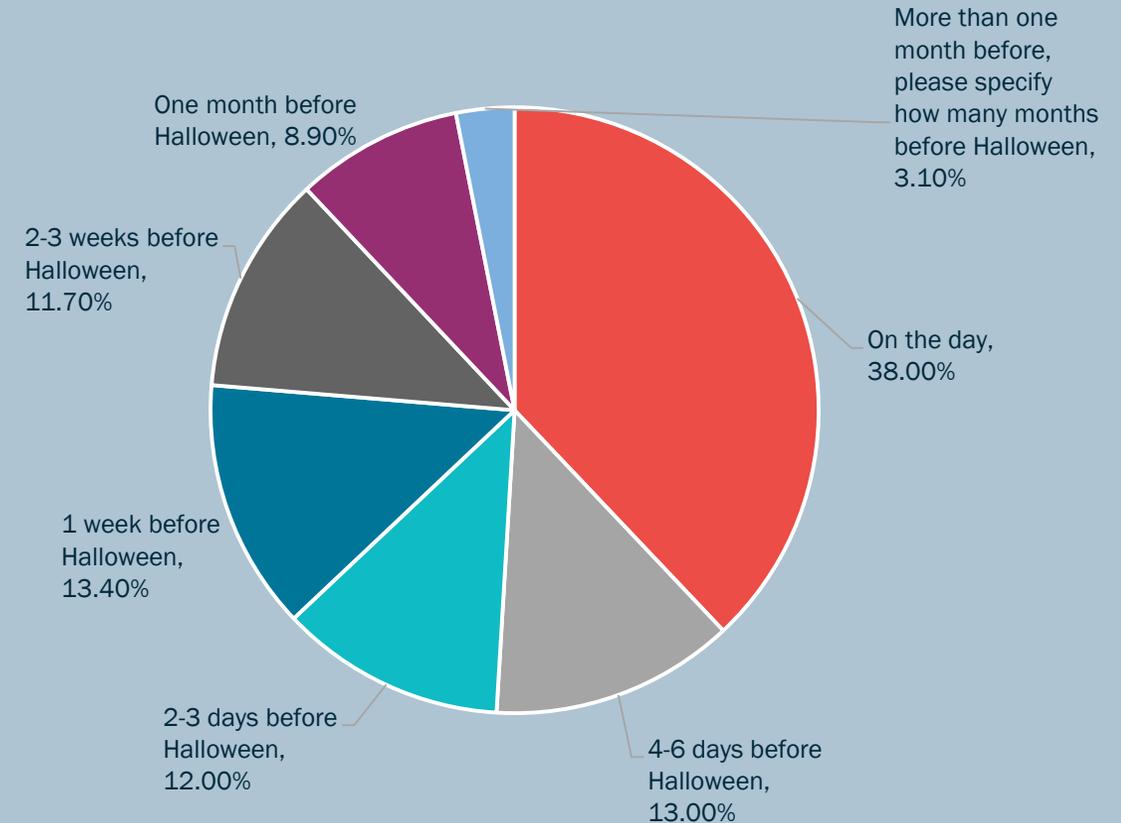
We are a spontaneous nation – 38% on average choose where to go on the day itself however there are big variations by city.

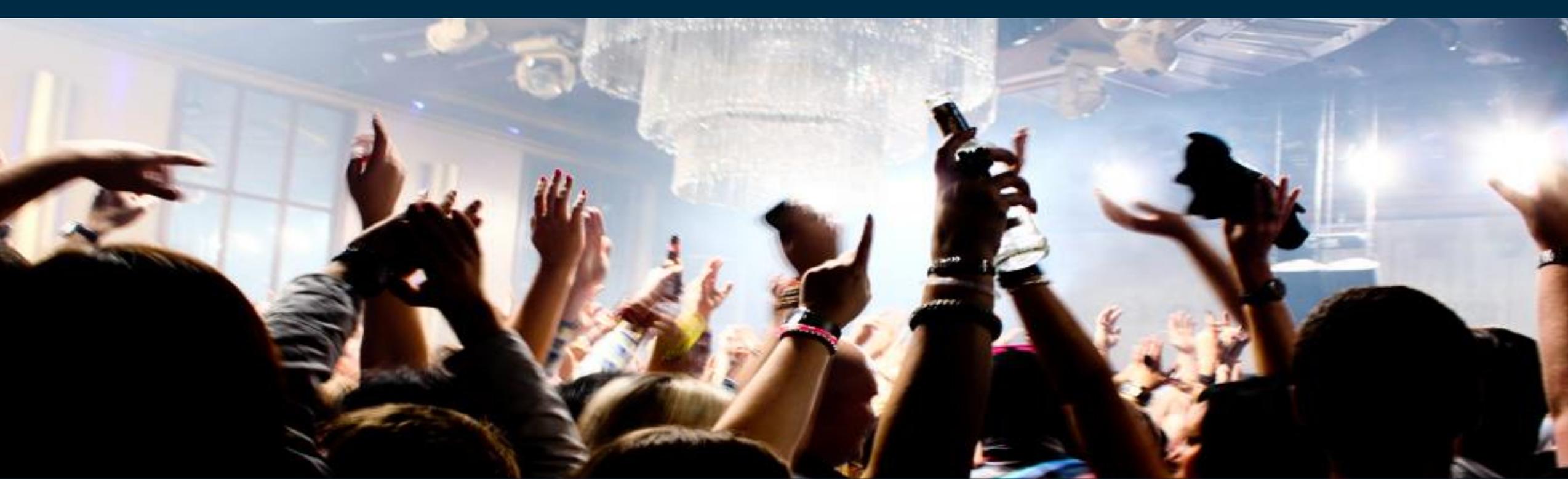
- Just under 2 in 5 (38%) Brits only make plans for Halloween on the day itself
- With just under 1 in 11 (9%) Brits start to make plans one month before
- The study found that nearly half of men (45%) were last minute organisers for Halloween, making plans on the day
- 10% of women looked to start planning one month in advance
- Over a half of 18 -30yr olds (56%) start making Halloween plans a week before

In the following cities, people on average begin preparing for Halloween:

- Nottingham – 13 days before
- Manchester – 11 days before
- Edinburgh – 12 days before
- London – 8 days before
- Glasgow – 8 days before
- Birmingham – 6 days before
- Belfast – 4 days before

Planning a late night for Halloween





END

Methodology

Sampling theory:

The Censuswide panel was originally recruited via sampling specialists and since has grown organically. Panellists can opt to answer all surveys – but will be filtered out if a survey is not relevant to them. Panellists are also invited to participate in surveys via a newsletter.

All surveys are incentivised according to the specialism of the panel, rewards include; points for prizes, cash and air miles all of which vary in value depending on the survey length.

Sample size:

Date range - 28.09.16 - 13.10.16

Total sample size 2522

Aged from 18+ General Respondents

Registration:

When joining the panel, each member is double opted in (an opt in and validation process) as well as completing a profiling questionnaire – which we then use to store their relevant information and are able to target specific sectors easily.

Accuracy of panel:

Our panel is monitored to remove any 'career respondents'. We pay special interest in any respondents who are seen to be completing surveys at speed or are entering contradictory data and they will be removed from the panel if they are found to be giving false data.

Question types:

Text, pictures, video and audio can be included in the survey – the question types include single and multiple response, sliding scales, grids and open ended questions.

Reporting:

We can provide the data in a variety of formats – Word, Excel, PowerPoint, SPSS.

As standard, you will receive four demographic breakdowns as part of the survey package and providing they have been requested beforehand, we can also offer a wide range of splits, varying from household income to which supermarket the respondent shops in.

Additional graphs and charts are also available on all surveys by request.

Accreditation:

Censuswide.com complies with the MRS Code of Conduct (2010) which is based upon the ESOMAR principles (for more information visit www.esomar.org)

The main principles for the code are:

1. Market researchers will confirm to all relevant national and international laws.
2. Market researchers will behave ethically and will not do anything which might damage the reputation of market research.
3. Market researchers will take special care when carrying out research among children and other vulnerable groups of the population.
4. Respondents' cooperation is voluntary and must be based on adequate, and not misleading, information about the general purpose and nature of the project when their agreement to participate is being obtained and all such statements must be honoured.
5. The rights of respondent as private individuals will be respected by market researchers and they will not be harmed or disadvantaged as the result of cooperating in a market research project.
6. Market researchers will never allow personal data they collect in a market research project to be used for any purpose other than market research.
7. Market researchers will ensure that projects and activities are designed, carried out, reported and documented accurately, transparently, objectively and to appropriate quality.
8. Market researchers will conform to the accepted principles of fair competition.