

# DELTA NIGHT INDEX

Released: May 2018

Data: February 2018 – April 2018

# INTRODUCTION

## **Peter Marks – Chief Executive, The Deltic Group**

This Deltic Night Index shows what I have made it my mission to share: that a town's late-night activity has a direct, positive effect on the economic health of the town or city it is in.

I feel strongly that the closure of any late night venue is very rarely a positive thing for our towns and cities – no town has become busier or more successful because of a closure. This is because late night venues don't just bring consumers out at night, they encourage daytime custom too.

That said, even I was surprised that 83% of those surveyed buy new clothes or accessories in preparation for a night out – a huge proportion. Added to that is the support that consumers give their local hairdressers, beauty salons and shops before the evening starts, when they will spend further on tickets, food, drinks and other experiences out of the home.

## **Philip Kolvin QC – Licensing Lawyer and Author of Manifesto for the Night Time Economy**

This latest set of figures from the Deltic Night Index contains three interwoven strands which are of crucial concern to policy makers. The first is that the key driver of night time activity is sociability. Successful city centres contain an interesting, vibrant, diverse mix of activities for people to engage in with their friends, away from the stresses of day to day life. The second is the symbiosis between night time leisure and other retails and service activities, including hairdressers, nail bars and shops selling clothes and cosmetics. Add to that other complementary sectors such as door supervision and transportation, one can clearly see the depth of the economic eco-system driven and sustained by night time leisure operators. The third is the importance of sociability in people's decisions on where to live. Towns need to attract the best and the brightest to drive economic development. This survey shows that their sociability is integral to their allure.

# HEADLINE FINDINGS

MAY 2018

## THE LATE NIGHT ECONOMY

- Total spend is up 6.9% year on year to £59.40
- 56.4% of British consumers are going on a night out at least once a week - up from 54.5% this time last year. This figure rises to almost 70% among 18-30-year olds (69.3%)
- Going out with a partner has become much more popular. When asked who they go out with usually on a night out, the number of respondents who cited their partner increased by more than 5% since last quarter, to 19.8%
- The proportion of respondents who go out to 'escape the stresses of day to day life' rose yet again to 45.5% (May 2017: 40.3%)
- When asked which type of late night leisure they spend the most money on each month, 26.3% cited the pub, whilst 32.0% cite a club or bar

## ITS IMPACT ON THE HIGH STREET

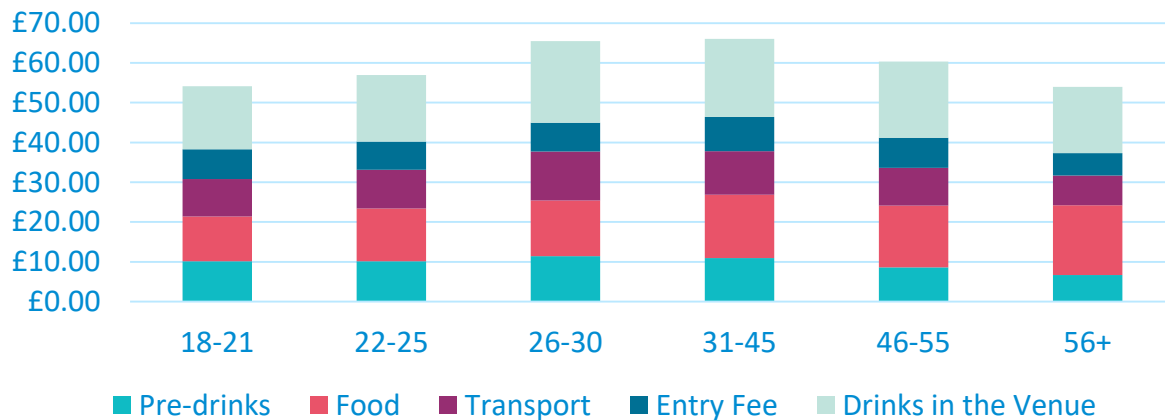
- Those surveyed estimate that they spend an average of £17.56 getting ready for a night out before they leave home. This includes clothing, hair and beauty, but not pre-drink costs
- A startling 82.9% of consumers buy new clothes or accessories in preparation for a night out occasionally or more often, comprising 71.9% men and 91.3% women
- 62.8% of consumers pay for a hair cut in preparation for a night out (men: 62.2%; women: 63.2%)
- 53.8% buy new make up or hair products ahead of a night out, including 25.5% men
- 39.1% of men pay to have a shave or beard trim occasionally or more often in preparation for a night out
- 37.7% of respondents go to their local gym ahead of a night out, with more men (39.4%) than women (36.4%) doing this
- 68.4% of consumers agree or strongly agree that a vibrant nightlife makes a city or town a more attractive place to live and work
- For 44.5% of respondents, the vibrancy of nightlife would be a key factor in their decision to move to a new town or city
- When asked what they spend the most money on, the majority of respondents (52.2%) cite new clothes, shoes or accessories – this comprises 41.4% men and 60.4% women.
- 13.6% spend the most money on their hair, and 13.4% spend the most on make up
- Men are more likely to spend the most money on hair than women (14.2% of men compared to 13.1% women)

# LATE NIGHT SPEND MIX

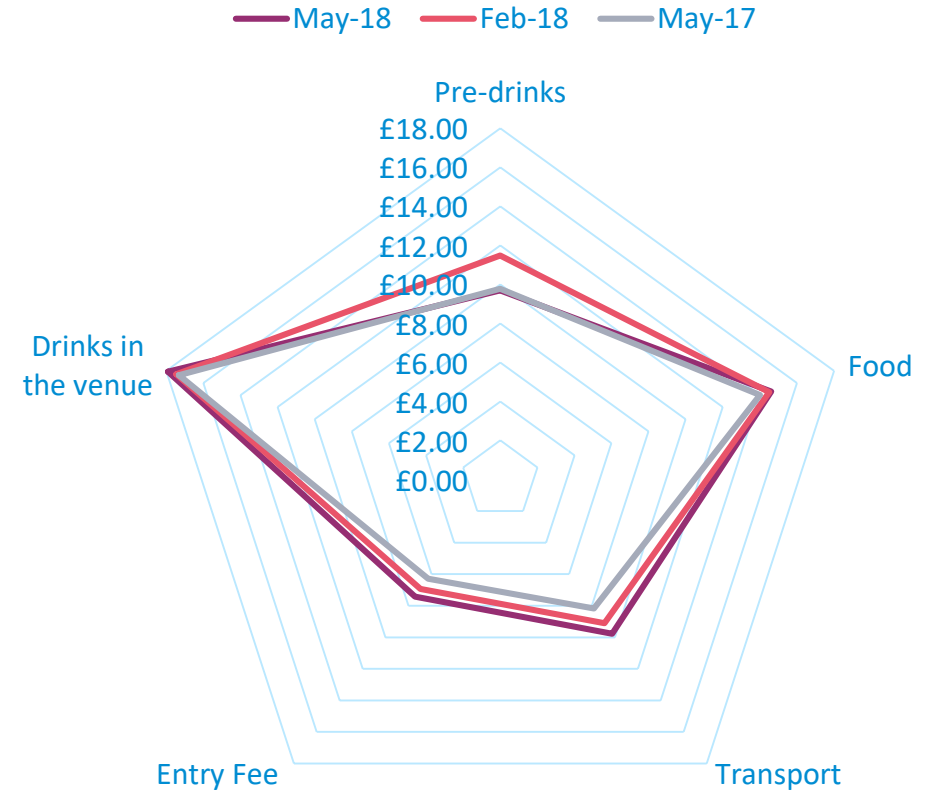
We asked respondents how much they spent on average during a night out.

- Average spend was £59.40 – this is a £3.84 (or 6.9%) increase from £55.56 last May
- Average spend on pre-drinks has declined by 0.9% year since May 2017. Average spend on all other areas – food, transport, entry fee and drinks in the venue – has increased
- The cities with the highest average spend are Belfast (£64.29), London (£64.11) and Cardiff (£63.89)
- The cities with the lowest average spend are Plymouth (£50.41), Nottingham (£51.56) and Bristol (£55.26)

Late night expenditure May 18, by age



Late night expenditure



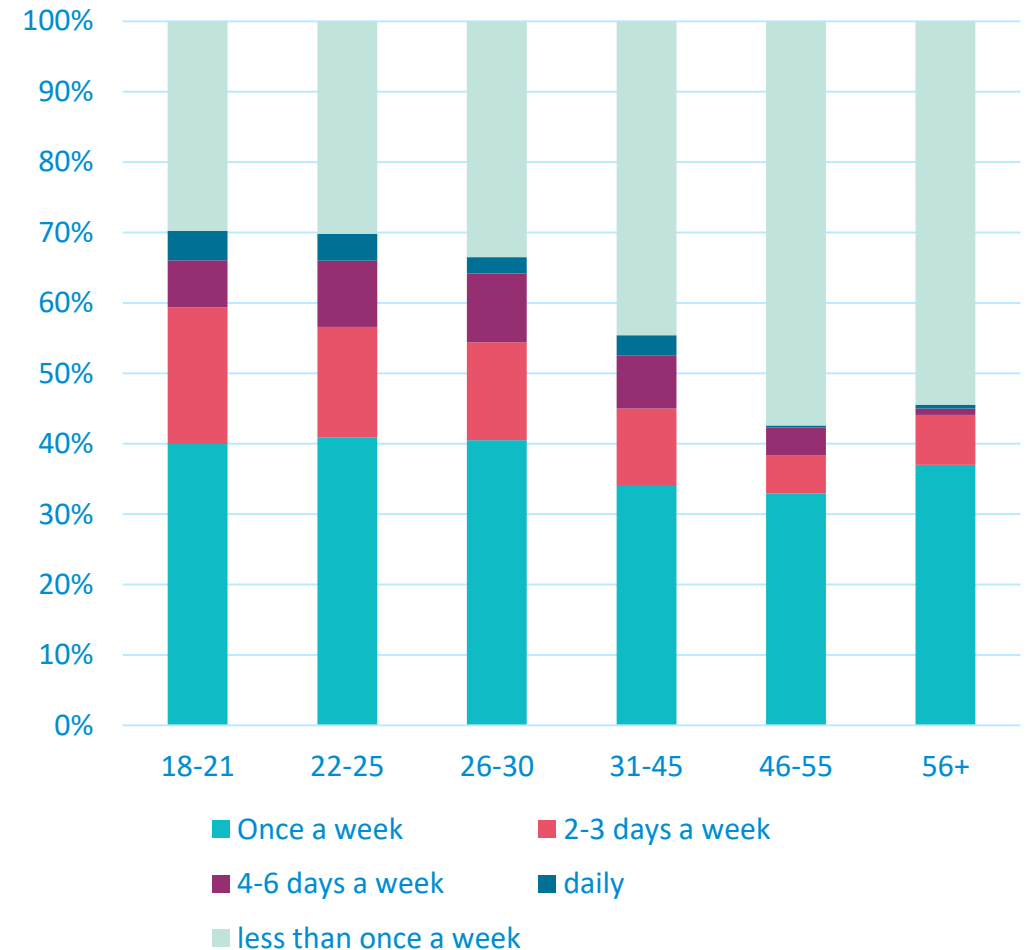
# FREQUENCY OF NIGHTS OUT

- 56.3% of Brits said they go on a night out at least once a week. This is up from 54.6% this time last year
- However, this rises to over two thirds among 18-30 year olds (69.3%)
- The majority of men (62.6%) go out at least once a week, compared to just over half of women (51.6%)
- 66.4% of students say they go out at least once a week, as did 62.6% of those that said they work full time. Whereas only 53.5% of those that work part time, and 37.0% of home makers said they do so
- 64.5% of single respondents said they go out at least once a week – this is followed by 66.1% of those that said they are in a relationship, 50.0% of those living with their partner, and 47.1% of married respondents

## REGIONAL BREAKDOWN

- Respondents in the following cities were most likely to go out at least once a week:
  - Leeds, 62.9% (up from 51.5% last year)
  - London and Manchester, both 61.8% (up from 61.2% and 58.2% from last year respectively)
  - Birmingham, 61.1% (up from 51.8% last year)
- Respondents in the following cities were least likely to go on a night out at least once a week:
  - Belfast, 45.3% (up from 44.7% last year)
  - Sheffield, 47.7% (up from 37.3% last year)
  - Plymouth, 48.1% (down from 48.8% last year)

Night out frequency, broken down by age



# LATE NIGHT ECONOMY SPENDING BY NIGHT OUT ACTIVITY

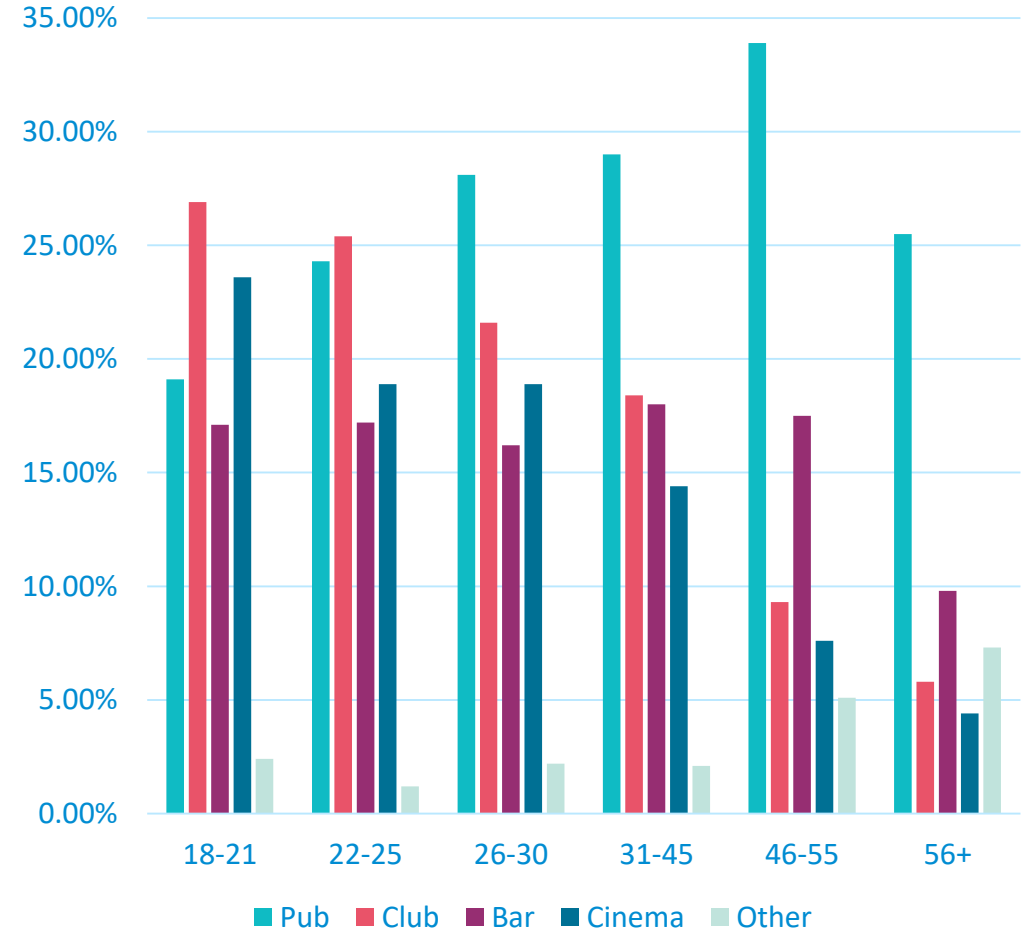
We asked respondents what type of late night leisure they spent the most money on each month during this period.

- Overall, the pub continues to be the most popular choice, with 26.3% of respondents saying this is where they spent the most money. This is up from 24.2% last May
- However, clubs were most popular among 18 – 30 year olds with a quarter (25.5%) saying they spent the most money on this each month. This is followed by pubs (22.0%) and the cinema (21.7%)
- 32.0% of respondents said that they spent the most money each month on bars and clubs – an increase from 23.6% this time last year

## REGIONAL BREAKDOWN

- Out of all the regions, Newcastle is where the most respondents said they spend the most money on clubbing each month (across all ages)
- Pubs are most popular in Bristol, with 36.2% of respondents spending most of their money on this type of late night leisure. This is followed by Plymouth (31.7%) and Liverpool (30.7%)
- Birmingham has the highest regional demand for new film viewings as 16.9% of people are spending most of their late night leisure budget on going to the cinema

Late night leisure spend by age group



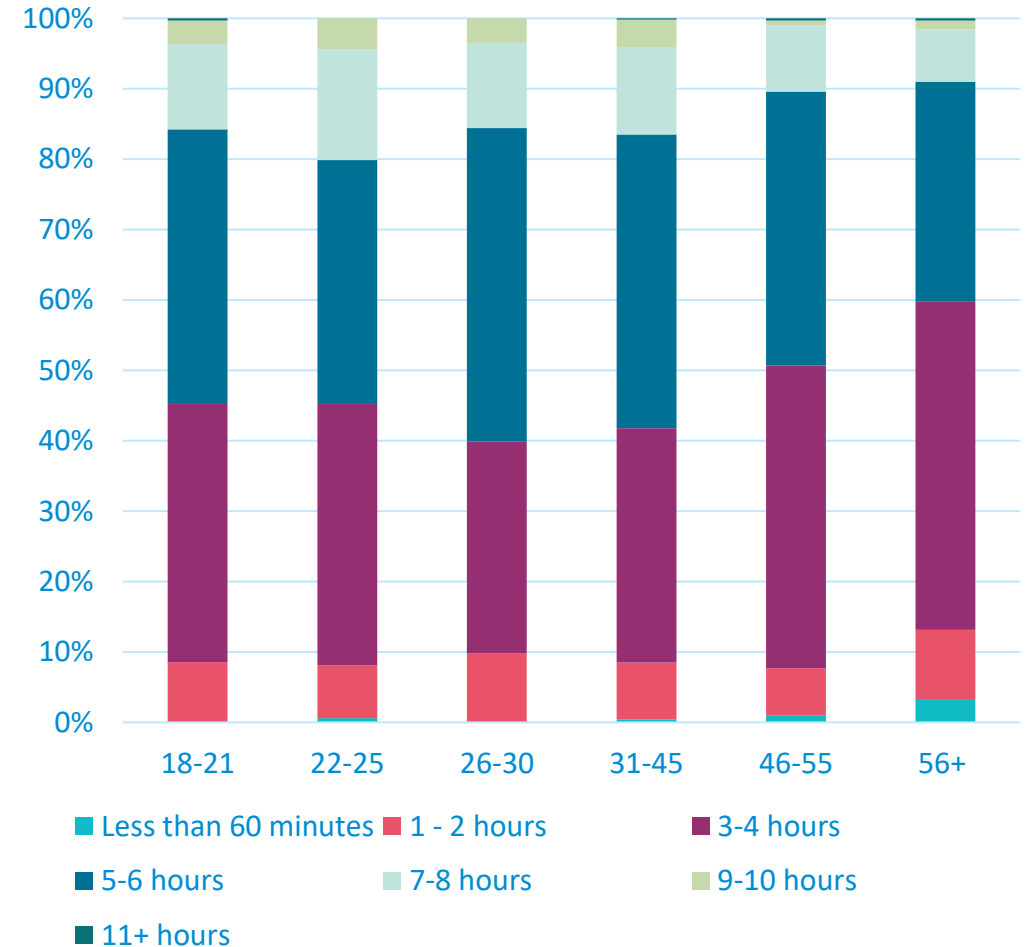
# NIGHT OUT TIMINGS

- The majority of nights out lasted either 3-4 hours 38.2% or 5-6 hours (38.2%), this varies only marginally year on year
- Nine in ten nights out (90.6%) last three hours or more. There is little difference in this across the age groups

## REGIONAL BREAKDOWN

- In Manchester a night out is more likely to go on for 7-8 hours than in any other city (17.4%) followed by Edinburgh (16.9%) and Sheffield (16.9%)
- In Nottingham a night out is more likely to last 5-6 hours than in any other city (48.5%), followed by Bristol (47.6%), Glasgow (47.5%), Brighton (47.4%), and Leeds (46.0%)

Length of a night out by age

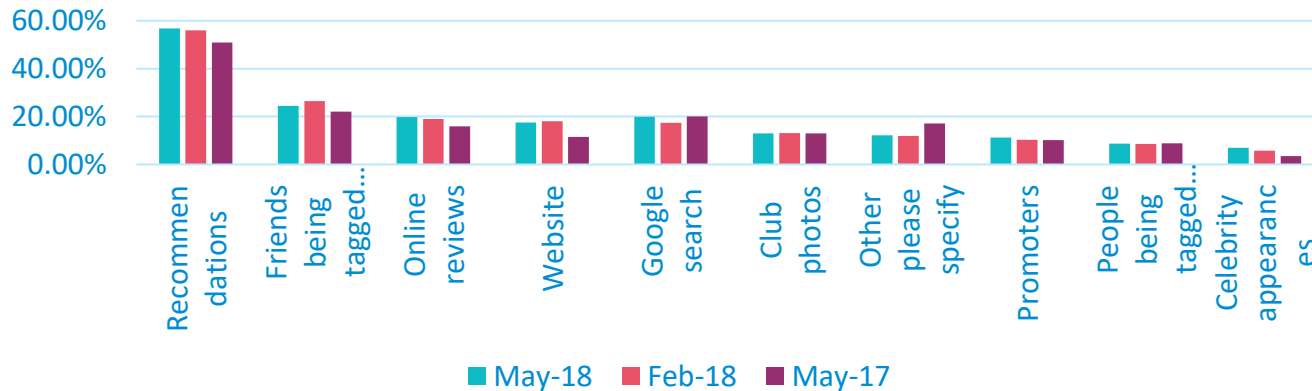


# PLANNING A NIGHT OUT

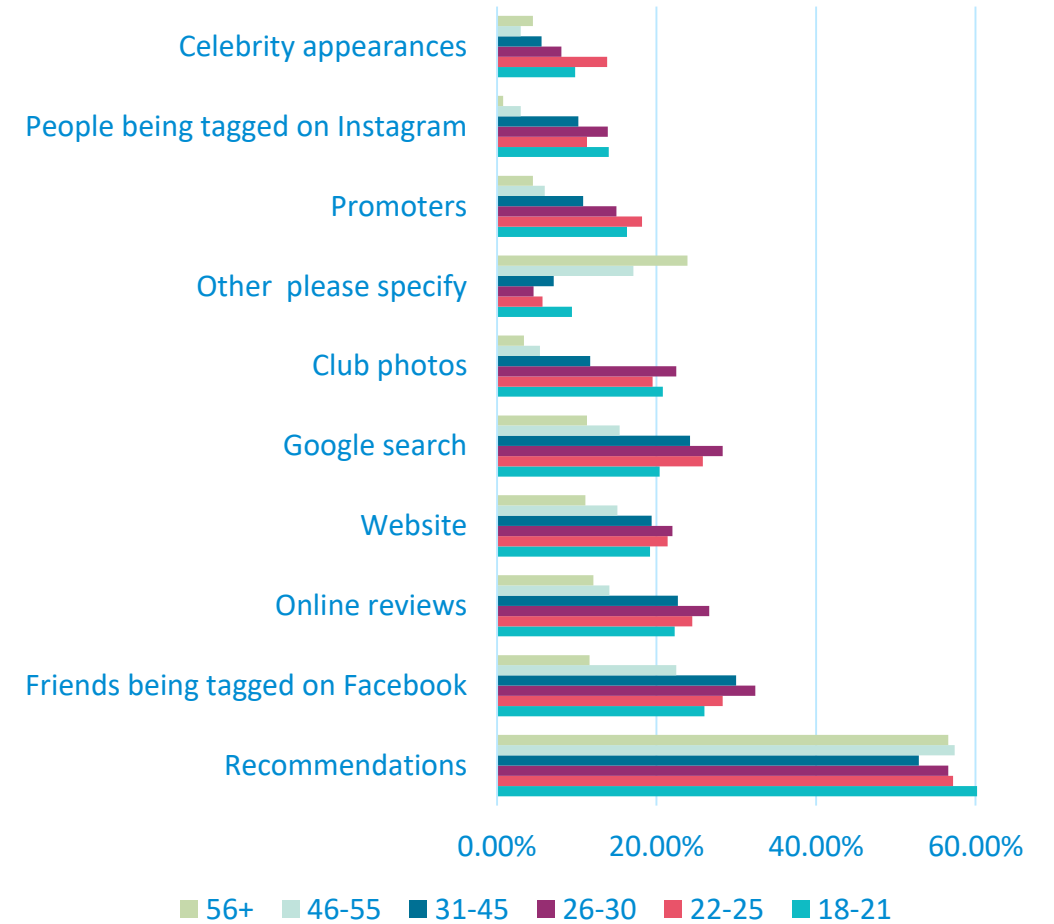
We asked respondents how they choose where to go on a night out. They were asked to select all options that applied.

- Recommendations continue to be the most popular factor, with 56.8% selecting this
- Almost every option has increased in popularity year on year, but most notably are recommendations (up from 50.9% in May 17), online reviews (up from 15.9% to 19.7%) and website (up from 11.5% to 17.5%)
- Facebook continues to be more influential as a tool in the decision-making process than Instagram, especially among 18-30 year olds. 47.3% said friends being tagged on Facebook was a factor, whereas just 22.8% said friends being tagged on Instagram was a factor

### Importance of factors over time



### Importance of factors by age





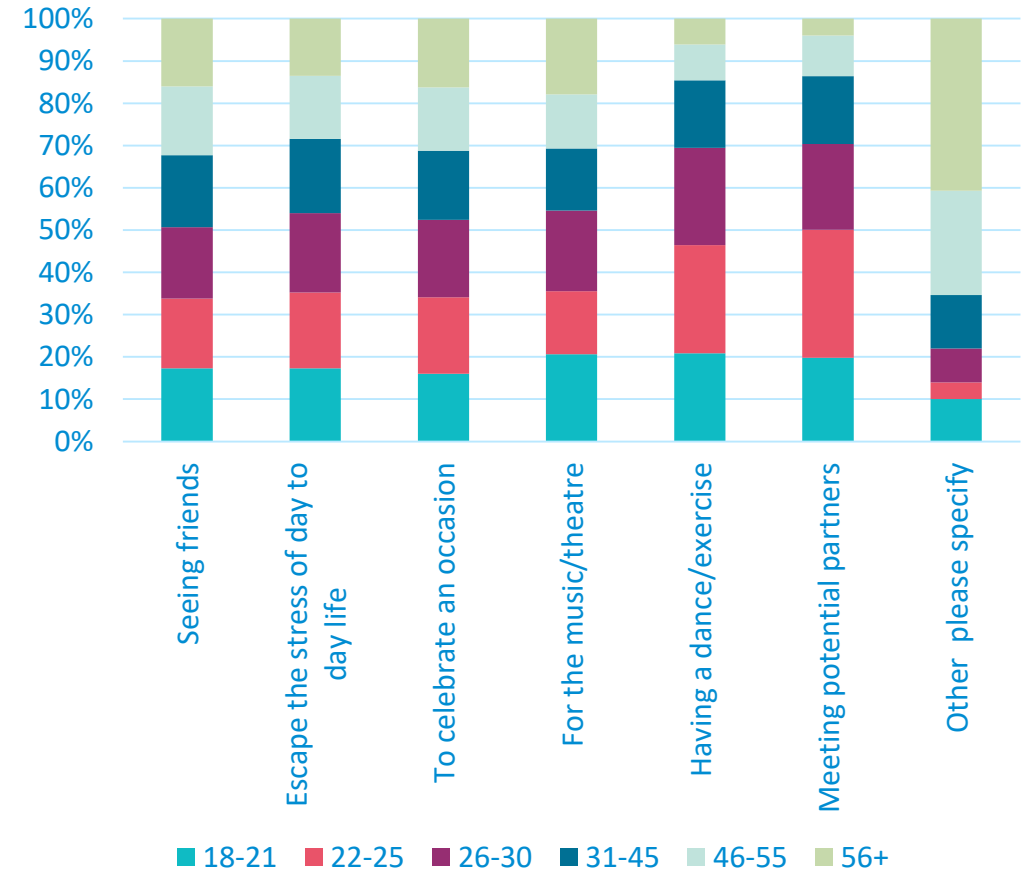
# WHY WE GO OUT

- Seeing friends continues to be the most popular reason we go on a night out, with 65.9% of respondents citing this
- Largely in line with previous surveys, this is followed by:
  - Escaping the stress of day to day life (45.5%)
  - To celebrate an occasion (34.1%)
  - For the music / theatre (16.3%)
  - To have a dance (16.0%)
  - To meet potential partners (6.9%)
- There is a slow but steady decline in the number of people that go out to meet potential partners (8.7% in May 17, 7.1% in Feb 18, and 6.9% in May 18)

## REGIONAL BREAKDOWN

- Whilst seeing friends was a reason that respondents in every city cited as to why they go out, it was a particularly popular reason in Edinburgh (77.1%), Brighton (73.7%), Plymouth (73.1%) and Southampton (73.1%)
- Over half of respondents in Leeds (54.9%) and Manchester (52.3%) cited escaping the stress of everyday life as a main reason they go out, more than any other city
- Residents in Birmingham (11.5%) and Newcastle (10.6%) are most likely to cite meeting potential partners as one of the main reasons they go out

Top reasons we go out, broken down by age



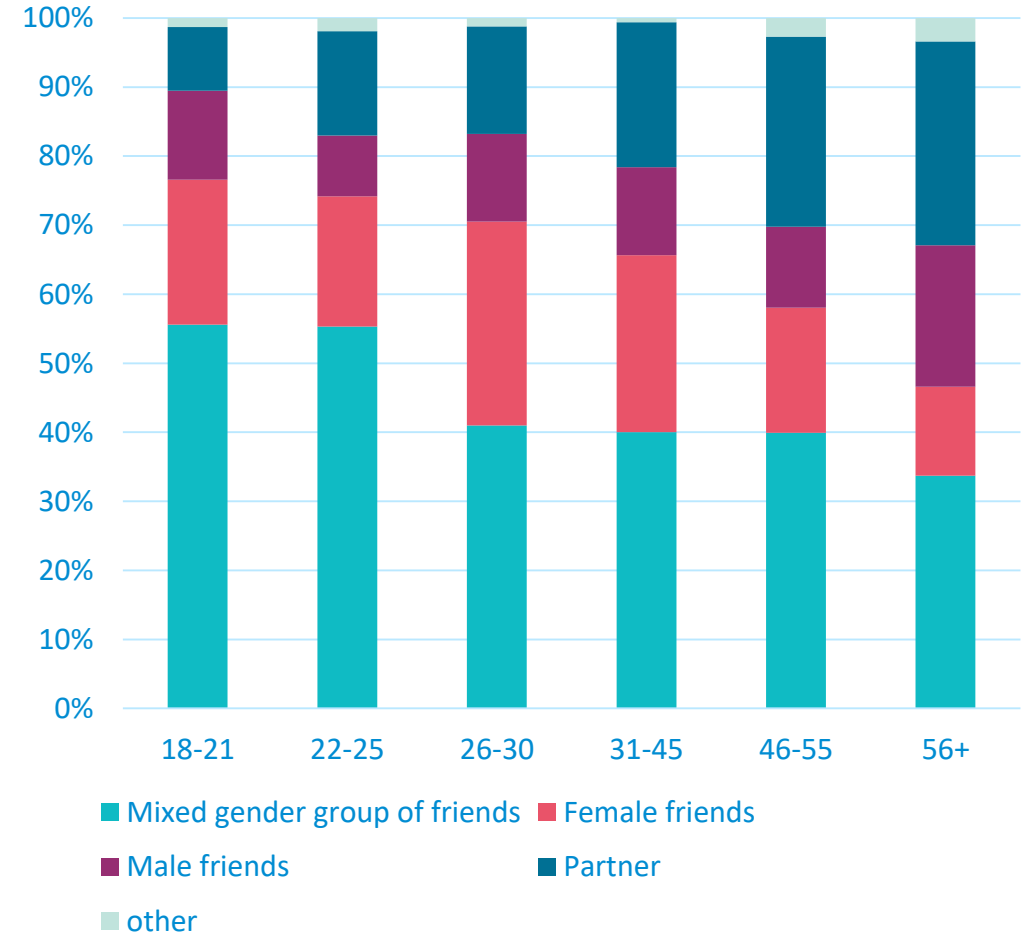
# WHO WE GO OUT WITH

- In line with previous reports, the majority of respondents (43.9%) go on a night out with a mixed gender group of friends
- About a third of respondents said they usually go on a night out with same sex friends; 33.1% of women said they usually go on a night out with female friends, and 28.3% of men with male friends
- Almost a fifth (19.8%) said they usually go out with their partner, up from 16.5% last year
- Younger respondents are least likely to go out with their partner (9.2% of 18 – 21 year olds), and most likely to go out with a mixed group of friends (55.6%). This changes as respondents get older – 29.5% of those aged 56 and above usually go out with their partner, and 33.7% go out with a mixed group of friends

## REGIONAL BREAKDOWN

- Respondents in Brighton are more likely than those in other cities to go out with a mixed gender group of friends, with 61.4%. This is followed by Plymouth, Belfast and Norwich at 51.9%, 50.9% and 50.0% respectively
- A quarter of respondents in Norwich (25.9%), Glasgow (25%) and Belfast (24.5%) usually go out with their partner – compared to only 10.5% of those in Brighton and 11.5% of those in Plymouth

Who we go out with, by age group



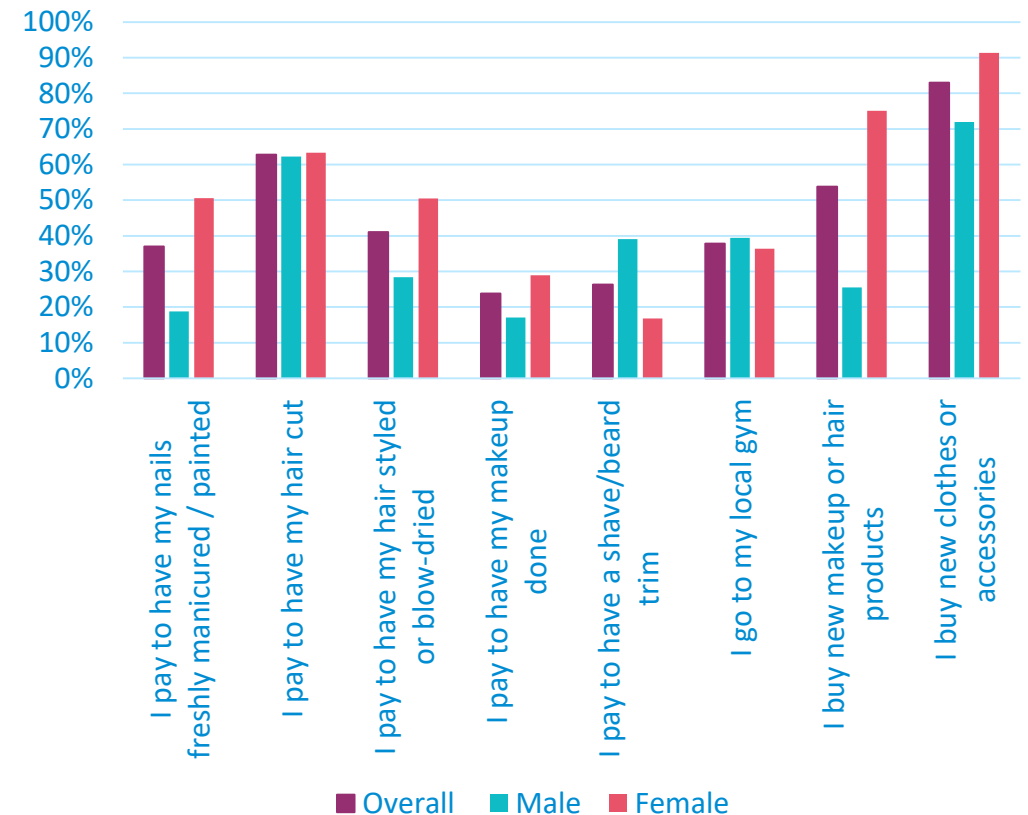
A vibrant nightclub scene with a large crowd of people dancing and celebrating. The air is filled with falling confetti, and the lighting is a mix of warm orange and cool blue/purple. A semi-transparent dark blue rectangle is overlaid in the center, containing the text.

**SPECIAL FOCUS:**  
**IMPACT ON THE HIGH STREET**

# HOW WE PREPARE FOR A NIGHT OUT

- A whopping 83% of consumers buy new clothes or accessories in preparation for a night out occasionally or more often, comprising 71.9% men and 91.3% women
- 62.8% of consumers pay for a hair cut in preparation for a night out (men: 62.2%; women: 36.8%)
- Two-fifths (41.0%) pay to have their hair styled or blow dried in preparation for a night out, including 50.5% of women and 28.4% of men
- 53.8% buy new make up or hair products in ahead of a night out, including 25.5% men
- 39.1% of men pay to have a shave or beard trim occasionally or more often in preparation for a night out
- 37.7% of respondents go to their local gym ahead of a night out, with more men (39.4%) than women (36.4%) doing this
- This goes up to 48.1% of 18-21 year olds, 57.9% of 22-25 year olds and 56.1% of 26-30 year olds
- Half (50.6%) of women pay to have their nails manicured or painted in preparation for a night out occasionally or more often, while almost a fifth (18.8%) of men do
- 38.7% of those aged 26-30, and 37.1% of those aged 22-25 pay to have their makeup professionally done in preparation for a night out, compared to 23.8% overall

## Preparation activity respondents do occasionally, or more often



# HOW WE PREPARE FOR A NIGHT OUT

## REGIONAL BREAKDOWN



### Having a manicure / getting your nails painted

- Cities where its most popular: Birmingham (49%), Newcastle (40.1%), Glasgow and London (38.9%)
- Cities it is least popular: Belfast (20.8%), Leeds (30.1%), Sheffield (30.8%)



### Having a hair cut:

- Cities where its most popular: Cardiff (72.1%), Birmingham (68.8%), Newcastle (67.1)
- Cities it is least popular: Leeds (53.9%), Brighton (54.8%), Bristol (54.9%)



### Having your hair blow dried or styled

- Cities where its most popular: Birmingham (53.3%), Manchester (46.9%), Newcastle (44.7%)
- Cities it is least popular: Belfast (26.4%), Bristol (30.5%), Norwich (35.2%)



### Getting your makeup professionally done

- Cities where its most popular: Birmingham (31.7%), Glasgow (27.5%), Newcastle (27.1%)
- Cities it is least popular: Nottingham (15.5%), Norwich (16.7%), Liverpool (16.9%)



### Getting your beard trimmed or shaved

- Cities where its most popular: London (33.3%), Birmingham (32.2%), Glasgow (31.3%)
- Cities it is least popular: Liverpool (16.9%), Brighton (17.5%), Sheffield (18.5%)



### Going to the local gym

- Cities where its most popular: Birmingham (49.5%), Cardiff (45.6%), London (44.1%)
- Cities it is least popular: Belfast (20.8%), Liverpool (21.4%), Sheffield (26.2%)



### Buying new makeup or hair products:

- Cities where its most popular: Sheffield (63.1%), Brighton (61.4%), Birmingham (61.1%)
- Cities it is least popular: Belfast (41.5%), Norwich (42.6%), Plymouth (46.2%)



### Buying new clothes or accessories

- Cities where its most popular: Birmingham (89.0%), Newcastle (88.2%), Cardiff (87.3%)
- Cities it is least popular: Plymouth (73.1%), Sheffield (76.9%), London (80.7%)

# HOW MUCH WE SPEND PREPARING FOR A NIGHT OUT?

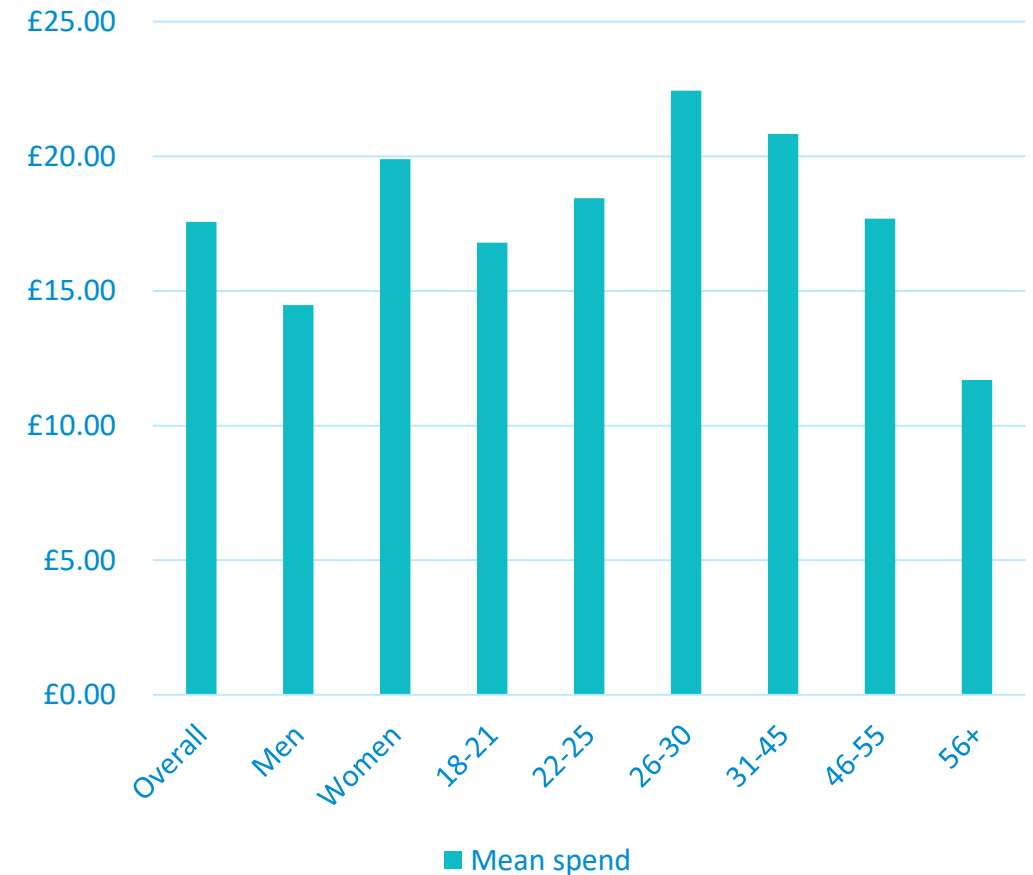
- On average, Brits spend £17.56 on getting ready for a night out. This includes things like new clothes, beauty treatments, hair cuts and so on, but not pre-drinks, travel or entry fees.
- This goes up to £22.44 among 26-30 year olds
- Those aged 56+ spend the least (£11.70)
- Men spend less than women (£14.47 compared to £19.89)
- Those in Cardiff spend the most getting ready for a night out at £20.41, followed by Liverpool (£19.25), and Birmingham (£18.75)
- Those in Plymouth spend least (£12.85), followed by Southampton (£14.16) and Nottingham (£14.23)

## WHERE WE SPEND OUR MONEY

We asked respondents what they spend the most money on in preparation for a night out – respondents could select up to two choices

- The majority (52.2%) cite new clothes, shoes or accessories – this comprises 41.4% men and 60.4% women
- 28.8% said that there wasn't one thing that they spent the most money on
- 20.6% of women said they spent the most money on new make up, and 13.1% said they sent the most on hair styling, treatments and cuts
- 14.2% of men said they spent the most money on hair styling, treatments and cuts, and 6.0% said they spent the most on beauty treatments (compared to 8.3% of women)
- There was little regional difference

Mean spend in preparation for a night out



# WHY A GOOD NIGHT OUT MATTERS

- 68.4% of respondents agreed or strongly agreed that “A vibrant nightlife makes a city or town a more attractive place to live and work”
- This goes up to 77.1% among 18-30 year olds
- 44.5% of Brits agreed or strongly agreed that “If I was to think about moving to a new town or city, the vibrancy of the nightlife would be a key factor in my decision”
- This goes up to 57.1% among 18–30 year olds

“

A vibrant nightlife – cinemas, nightclubs, live music, venues, theatres, bars and pubs – makes a city or town a more attractive place to live and work

”

“

If I was to think about moving to a new town or city, the vibrancy of the nightlife would be a key factor in my decision

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