



NTIA

Night Time Economy Market Monitor

February 2025

Welcome to the first edition of the *Night Time Economy Market Monitor*.

The Night Time Industries Association and CGA by NIQ are launching this new quarterly series to shine a light on hospitality's vital night time sector. The Monitor will reveal the scale of the market and its contribution to the economy, jobs and the social and cultural life of the country.

It starts with an economic assessment of the sector, putting numbers to consumer spend, value added within the industry, and employment over the last decade. Following, is an overview of the sector in 2025, including results from CGA by NIQ's recent survey of NTIA members. Each quarter the Monitor will assess the latest dynamics of the sector's venues, including opening and closure numbers across all phases of the night time market—from early-evening restaurants and bars

to late-night clubs and casinos. Our reports will also draw on CGA's latest research into the views of consumers and business leaders, and aim to help venue operators, suppliers, investors and the media track the latest trends and benchmark performance.

As we see in this report, the last few years have brought some unprecedented challenges for the night time economy—but there are also encouraging signs for the future if the sector can secure the right support from government. After so much change, no-one knows for sure what the new normal of this sector is going to look like—but our Monitor will be here to help us better understand the future of this evolving and dynamic industry.

The night time economy: The state of play in 2025

Consumers' changing behaviour

The night time landscape is changing, and many of consumers' traditional high-tempo and high-spend activities are in decline. Well over half of leaders have seen a year-on-year drop in trade from things like bar crawls (62%), hen and stag dos (54%) and student trade (56%). And across the board, people tend to be spending less. Nearly three quarters of leaders have seen a decrease in guest footfall (72%), the number of drinks bought (73%), and the average spend per visit (74%). However, while some people are keeping a close eye on their money, others continue to spend freely, creating a polarisation that is likely to continue into 2025.

Consumers are also diversifying their evening habits. Nearly two thirds (62%) of those who go out for high tempo occasions say they are looking for new types of these occasions them, while 63% are looking for new experiences like music and gaming. Both numbers are significantly higher among Gen Z consumers, which points to a generational shift in attitudes towards nights out.



Experience-led venues have been one of the biggest beneficiaries of this change. A third **(33%)** say they are visiting more of these sites for high-tempo occasions than they were ago, while only **(19%)** are using them less. The same numbers apply to street food venues and food halls, which also provide consumers with the fresh experiences they crave. In sharp contrast, while **23%** are making more visits to late-night bars, **30%** are going there less often.

As they switch to this new breed of venues, consumers tend to go out earlier. For example, **37%** of those who use competitive socialising venues for high tempo occasions say they are doing so earlier than they were a year ago, while only **9%** are going out later. This shift is apparent across all high tempo nights out, like pub and bar crawls and social or ticketed events. The trend is driven by a variety of factors, including a greater feeling of safety earlier in the day, and a desire to avoid crowds and problems with late-night transport.

Sales

CGA by NIQ's market measurement service calculates that total drinks sales in Britain's On Premise totalled **£31.2bn**. Despite pressure on consumers' spending, this is down by only **0.6%** year-on-year. Bars generated **£1.6bn**—up by **2.4%** from 2023—while bar restaurants were close behind but down by **1.7%** at **£1.4bn**. The nightclub sector was more challenging, with drinks sales down by **22.9%** to **£363m**.

On the managed side of the market, some segments of the evening economy performed well in 2024. The CGA and RSM Hospitality Business Tracker, which measures monthly sales at Britain's leading restaurant, pub and bar groups, indicates year-on-year growth in total food and drink sales of **3.2%** in 2024—roughly in line with inflation, and a solid performance in the context of very high costs for businesses and consumers alike.

Growth in the bar segment of the Tracker was lower at **1.3%**, but higher in other channels like experiential venues, where sales rose **5.3%**. This shows how some consumers are evolving their leisure time, and moving away from traditional late-night venues towards bars and places that offer elements of competitive socialising or entertainment.

The move towards earlier nights out has had some significant impacts on sales patterns, and tilted trading towards early and mid evenings. This has put pressure on the late-night (10pm to 1am) and early-hours (1am onwards) trading periods, where **69%** of leaders have seen a significant or slight decrease in sales year-on-year. Some of this lost ground has been made up in other dayparts like mid-evening (6pm to 8pm) and early-evening (4pm to 6pm), where the proportions of leaders reporting decreases are lower at **48%** and **51%**.



-2.8%

Net decline in late-night venues, December 2023 to December 2024

Profitability

Rising costs, exacerbated by the Budget, are squeezing margins across hospitality. Two fifths **(42%)** of NTIA members said they made less profit in the third quarter of 2024 than in the same period in 2023, while only **16%** had made more. Alarming, nearly a fifth **(18%)** said they had operated at a loss and **5%** felt they were under immediate threat of failure.

Market confidence

CGA by NIQ's survey of NTIA members shows only **13%** of leaders feel optimistic about the market over the next 12 months, while **65%** feel pessimistic. Optimism about their own businesses is slightly higher at **22%**, but far more leaders **(53%)** feel pessimistic. All these numbers are in line with general sector confidence, as measured by CGA's quarterly Business Confidence Survey,

which took a hit after the introduction of new costs in the government's Autumn Budget. Pessimism levels are particularly high among independent business leaders, who typically have fewer reserves to draw on.

Cultural contributions

The member survey demonstrates the huge cultural contribution of late-night venues. Just over half **(54%)** of respondents host live instrumental music, while **44%** have live electronic music, and **37%** have club or society nights. Other popular types of entertainment include drag / cabaret **(30%)**, traditional events like quizzes and bingo **(26%)** and comedy **(16%)**. Competitive socialising, one of the big growth areas of hospitality in recent years, is now hosted by **14%** of operators

The economic impact of the Night Time Economy

Consumer spend by year and by subsector

TOTAL SALES in £m

| | Out of Home Culture & Leisure Economy | | Day Time Economy | | Night Time Economy | | Night Time Cultural Economy | |
|------|---------------------------------------|----------|------------------|----------|--------------------|----------|-----------------------------|----------|
| | Value £m | % Change | Value £m | % Change | Value £m | % Change | Value £m | % Change |
| 2010 | £126,280 | | £41,733 | | £84,548 | | £24,651 | |
| 2011 | £133,161 | 5.4% | £44,273 | 6.1% | £88,888 | 5.1% | £25,313 | 2.7% |
| 2012 | £139,565 | 4.8% | £45,978 | 3.9% | £93,587 | 5.3% | £26,545 | 4.9% |
| 2013 | £145,821 | 4.5% | £48,155 | 4.7% | £97,666 | 4.4% | £27,076 | 2.0% |
| 2014 | £155,131 | 6.4% | £51,468 | 6.9% | £103,662 | 6.1% | £29,402 | 8.6% |
| 2015 | £161,736 | 4.3% | £53,260 | 3.5% | £108,477 | 4.6% | £30,345 | 3.2% |
| 2016 | £169,670 | 4.9% | £55,018 | 3.3% | £114,653 | 5.7% | £31,246 | 3.0% |
| 2017 | £179,515 | 5.8% | £57,666 | 4.8% | £121,849 | 6.3% | £33,374 | 6.8% |
| 2018 | £184,514 | 2.8% | £59,193 | 2.6% | £125,321 | 2.8% | £34,105 | 2.2% |
| 2019 | £192,084 | 4.1% | £61,942 | 4.6% | £130,142 | 3.8% | £36,147 | 6.0% |
| 2020 | £120,680 | -37.2% | £45,516 | -26.5% | £75,164 | -42.2% | £21,041 | -41.8% |
| 2021 | £155,507 | 28.9% | £51,633 | 13.4% | £103,874 | 38.2% | £28,107 | 33.6% |
| 2022 | £209,050 | 34.4% | £66,066 | 28.0% | £142,985 | 37.7% | £40,037 | 42.4% |
| 2023 | £218,461 | 4.5% | £68,360 | 3.5% | £150,101 | 5.0% | £41,387 | 3.4% |
| 2024 | £223,515 | 2.3% | £69,603 | 1.8% | £153,912 | 2.5% | £42,710 | 3.2% |

Source: ONS & NTIA Market Estimates

Commentary

Since the last edition of the NTIA's Market Monitor Report, consumer spending has seen growth resembling the rates of the pre-Covid-19 era. Notably, the Night Time Cultural Economy has returned strong year on-on-year growth of **3.2%**

in 2024, ahead of the total market rate of **2.3%**. However, what cannot be ignored is that growth in all sectors has slowed since 2023, and emphasises the difficulties faced by the sector as a whole.



Gross Value Added (GVA) by year and by subsector

| | Out of Home Culture & Leisure Economy (£m) | Night Time Economy (£m) | Night Time Cultural Economy (£m) |
|------|--|-------------------------|----------------------------------|
| 2011 | £49,952 | £31,550 | £8,047 |
| 2012 | £52,493 | £33,378 | £8,436 |
| 2013 | £56,687 | £34,391 | £9,579 |
| 2014 | £63,278 | £38,125 | £10,584 |
| 2015 | £66,413 | £39,979 | £11,104 |
| 2016 | £65,283 | £41,864 | £10,437 |
| 2017 | £69,481 | £43,973 | £11,059 |
| 2018 | £73,351 | £46,368 | £11,571 |
| 2019 | £75,391 | £47,505 | £11,591 |
| 2020 | £50,770 | £30,575 | £7,745 |
| 2021 | £68,360 | £41,982 | £10,157 |
| 2022 | £71,893 | £43,517 | £10,848 |
| 2023 | £71,668 | £43,306 | £10,864 |

Commentary

Gross Value Added (GVA) is the primary measure used by HM Treasury and economists to measure an industry's output productivity. It is a more accurate measure than GDP because it takes into account the difference between input and outputs, i.e. how much 'value' does an industry add to its raw inputs, rather than just how much it turns over.

The last available year of ONS and DCMS GVA data (2023) shows that UK Gross Value Added has

essentially stagnated in all of the subsectors of the leisure and night-time economy.

One of the likely reasons for this stagnation is the continued rise in the cost of doing business, despite increased consumer spending. Labour costs, and the purchasing costs of food and drink, were subject to higher levels of inflation in 2023 than in the years between 2011 and 2021.



Employment by year and by subsector

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Out of Home Culture & Leisure Economy (000s) | 2,503 | 2,513 | 2,508 | 2,571 | 2,652 | 2,812 | 2,846 | 2,866 | 2,920 | 2,689 | 2,870 | 3,112 | 3,159 |
| Night Time Economy (000s) | 1,668 | 1,668 | 1,664 | 1,710 | 1,767 | 1,872 | 1,893 | 1,903 | 1,946 | 1,791 | 1,899 | 2,075 | 2,110 |
| Night Time Cultural Economy (000s) | 375 | 381 | 379 | 382 | 398 | 415 | 425 | 422 | 425 | 392 | 424 | 452 | 471 |

Commentary

Employment figures (BRES, ONS and NTIA modelling estimates) show small increases in 2023 in our three UK subsectors of interest. This demonstrates some overall resilience.

However, within these broader figures, there were significant falls in employment in key areas of the night-time economy. For example, 'licensed club' employment fell sharply by **23%**, from 88,300 in 2022 to **68,200** in 2023. Pub and bar employment also significantly declined by **12%**, from 540,400 in 2022 to **474,300**.

The changing shape of leisure employment has brought growth to some sectors though, with jobs in sporting venues, clubs and gyms significantly increasing in the same period, from 409,900 in 2022 to **452,800** in 2023, for a gain of **10%**.

Overall, the UK Out-of-Home Leisure Economy, and the Night Time and Night Time Cultural Economy within it, remain huge employment sources for the national economy.

0.0%

Net change in total hospitality sites, December 2023 to December 2024

-2.8%

Net decline in late-night venues, December 2023 to December 2024

Not as simple as night and day: How the night time economy is diversifying

Changes and challenges

COVID and the costs crisis have made it a tough five years for hospitality businesses. These two crises have significantly changed the late-night landscape—but the impacts have not been shared equally.

This first edition of our Night Time Economy Market Monitor shows how fast things are changing across the spectrum—from early-evening food service through to the lights coming on at the end of the night. Britain's night time economy, social life, culture and employment are all being reshaped.

The 10pm-to-1am period remains the core of the night time economy. Our recent survey of Night

Time Industries Association members found that **86%** of operators opened during this time. But this sector spans much further. **40%** of NTIA members provide hospitality service before 4pm—and **12%** are even open for breakfast service.

This shows the diversity of hospitality and proves there is no clear line between night and day operations. A strong night time economy bolsters and brings richness to all of hospitality. If it's not performing to its full potential, or not receiving the right support from central and local governments, it is hampering the success of hospitality as a whole.



An evolving economy

With only a quarter (24%) of NTIA members reporting revenue growth in any of their night time trading times, it is clear that challenges are already here. They are most keenly felt in the early hours, and (70%) of NTIA members report falling revenue in post-1am trading. Far fewer (47%) report a fall in the 6pm-to-8pm period. CGA by NIQ's sales measurement service reinforces this pattern, with dayparts after 7pm losing market share to early evenings and afternoons.

This shift reflects changes in consumers' mindsets. The cost of living crisis has reduced many people's spending, while the COVID pandemic disrupted their routines. With less money in their pockets, footfall has been reduced and some consumers are choosing to reduce their nights out and end their trips earlier. Across the board, nearly a third (31%) of NTIA members report a significant decline in footfall over the past six months—notably higher than the 21% reported in similar surveys covering the entire hospitality market.

In particular, the double whammy of COVID and costs has reshaped attitudes to high tempo occasions—the traditional cornerstone of the night time economy. Among those who have big nights out or pub crawls, 28% and 31% say they are visiting earlier—far more than the 17% and 13% who are going out later. In the competitive socialising sector, 37% are visiting earlier and only 9% later. These numbers show how consumers are dialling down the tempo of their visits to pubs and bars. It is also being driven by consumers who are increasingly moderating their alcohol consumption, and a desire to avoid crowded

environments that stepped up a level during the health concerns of COVID. Safety is another motivating factor—as are issues with late-night travel infrastructure, with a fifth (19%) of high tempo consumers pointing to the greater availability of public transport during the day as a reason for earlier visits.

It is all putting pressure on night time operators and suppliers to cater for new habits and priorities. But all these issues also affect businesses at an employment level too. More than a third (37%) of NTIA members say safety concerns about late commuting are a barrier to recruitment and retention, and similar numbers cite the cost of taxis and ridesharing (33%) and the infrequency of public transport (30%). While the burden of meeting new consumer demand lies with businesses, they need help from local and national government to ensure local infrastructure properly supports the night time economy.

The three tiers of the night time economy

All these trends provide both challenges and opportunities across the night time ecosystem. Here we review trends in venue openings and closures in three different aspects: the late-night market, evening economy and wider night time economy (see end of report for our category definitions).



Night time licensed premises, December 2024 v March 2020 and December 2023

| | Sites at March 2020 | Sites at Dec 2023 | Sites at Dec 2024 | Change in sites, Dec 2024 v March 2020 | Change in sites, Dec 2024 v Dec 2023 |
|---------------------------------------|---------------------|-------------------|-------------------|--|--------------------------------------|
| Sites in the late-night economy | 3,026 | 2,329 | 2,264 | -2.8% | -25.2% |
| Sites in the evening economy | 17,405 | 15,405 | 16,004 | +3.9% | -8.0% |
| Sites in the wider night time economy | 102,446 | 88,637 | 88,726 | +0.1% | -13.4% |
| Sites in the total hospitality sector | 115,108 | 99,113 | 99,120 | +0.0% | -13.9% |

Sites in the late-night economy

As our table shows, there were 2,264 sites in our 'Late-night economy' category—2.8% fewer than at the end of 2023, and 25.2% down on the pre-COVID level of March 2020. Nightclubs have borne the brunt of these closures, and their numbers are now 33.2% below pre-COVID. Late-night bars have been a little more resilient at 20.0% down.

These numbers reflect a sharp drop in footfall at late-night clubs and bars, as some consumers switch to earlier nights out and others look elsewhere for their late-night activities. They also show the seismic impact of COVID, as many clubs and bars never recovered from the interruption to trade in 2020 and 2021. Others were pushed to closure by the impact of high inflation on operating costs and consumers' spending—though there are signs that the steady fall in late-night venues may be slowing, as net closures were lower in 2024 than in previous years.

These late-night venue closures has been damaging in all sorts of ways—to venue owners, staff, consumers and communities. And even at venues that have stayed open, trading hours have often been cut. Two in five (42%) NTIA members say they have reduced their hours, and 35% have closed on at least one additional day.

Sites in the evening economy

While nightclubs and late-night bars have experienced difficulties, some other channels have been more resilient in recent years. In our 'Evening economy' category—which also includes venues where the evenings are a major part of trading—site numbers increased year-on-year by 3.9% to 16,004 in 2024. It is equivalent to around 12 net new openings every week.

It partly reflects the success of bars, which grew in number in 2024 (see table). For example, themed bars increased by 24.4% in 2024, while cocktail bars and craft bars rose 17.4% and 14.3%. Bar restaurants, where food is as big a part of the offer as drink, rose 4.2%.

Growth in these formats is partly the result of a revamp of sites that were previously occupied by nightclubs, or repurposed into new formats by their parent groups. It shows how businesses have become more sharply focused on particular parts of the market, like cocktails, craft beer or competitive socialising—and also how there is strong demand for premium drinks. While people in general are buying fewer drinks, many are opting for more expensive ones than they do spend. Above all, the growth of different types of bars in 2024 proves that while the sector faces a lot of challenges, hospitality's night time economy isn't disappearing—it's just changing.



Bars: December 2024 v March 2020 and December 2023

| | Sites at March 2020 | Sites at Dec 2023 | Sites at Dec 2024 | Change in sites, Dec 2024 v March 2020 | Change in sites, Dec 2024 v Dec 2023 |
|-----------------|---------------------|-------------------|-------------------|--|--------------------------------------|
| Bar restaurant | 3,663 | 3,206 | 3,340 | -8.8% | +4.2% |
| Cocktail bar | 689 | 799 | 938 | +36.1% | +17.4% |
| Craft bar | 641 | 699 | 799 | +24.6% | +14.3% |
| Educational bar | 793 | 626 | 627 | -20.9% | +0.2% |
| Late night bar | 1,644 | 1,360 | 1,316 | -20.0% | -3.2% |
| *Themed bar | 109 | 242 | 301 | +176.1% | +24.4% |
| Wine bar | 666 | 629 | 646 | -3.0% | +2.7% |

*Themed Bars include competitive socialising venues

Sites in the wider night time economy

Our third and final breakdown of hospitality measures the 'Wider night time economy', which includes food-led and activity-led venues that operate in the evening as well as daytime. This segment of the market has been stable, with year-on-year growth of just **0.1%** in site numbers, to **88,276**. This is in line with the separate quarterly Hospitality Market Monitor—produced by CGA by NIQ with Alix Partners—which shows the total number of licensed venues has been virtually unchanged year-on-year.

Against that flat backdrop, growth in the evening economy has been impressive—and it represents a strong recovery from the upheaval of COVID. The footprint of the wider night time economy is now **13.9%** smaller than in March 2020, when venues were closing at the rate of **55** a week.

The night time economy by tenure

Since the start of the COVID pandemic, independently run hospitality venues have borne the brunt of closures, with managed groups better protected against challenges.

Across the evening economy, the independent side has lost **9.4%** of its venues since March 2020—equating to nearly **4** net closures per week. By sharp contrast, late-night sites run by managed groups have grown by **3.3%**. In some cases, groups



have swiftly reoccupied units that were vacated by failing small businesses, which have been unable to draw on the same level of resources. Experience-led brands, like Flight Club, Roxy's and Boom Battle Bar, have been at the front of this post-COVID trend, and they have been rewarded in sales terms. The CGA RSM Hospitality Business Tracker showed like-for-like growth of **5.3%** for experience-led managed operators in December—well above inflation, and four times the rate of **1.3%** for the bar sector as a whole.

Independent, managed and tenanted sites, December 2024 v March 2020

| | Independent | Tenanted | Managed | Total |
|---------------------------------------|-------------|----------|---------|--------|
| Sites in the late-night economy | -27.5% | -32.4% | -14.0% | -25.2% |
| Sites in the evening economy | -9.4% | -21.9% | +3.3% | -8.0% |
| Sites in the wider night time economy | -15.5% | -16.9% | -3.5% | -13.4% |



However, there are encouraging signs that the independent market is now building back. In the 12 months to December, indie-run sites in the evening economy grew by **6.1%**—significantly faster than the figure of **3.7%** on the managed side. This is a very welcome sign of the confidence of smaller bars and other night-time businesses despite the burden of rising costs that was made even heavier in the government's Autumn Budget.

However, it disguises a lot of churn in the market. 2024 saw **1,923** new independent venues open their doors in the evening economy, but **1,709** closed. The net result is positive, but the independent sector clearly remains rocky. Indies are vital to the

night time economy, and their immense contribution to Britain's communities, jobs and culture means they deserve support to sustain them through current challenges.

The picture is slightly different in the narrower late-night economy, comprised of nightclubs and late-night bars. Managed nightclubs have been stable, but managed late-night bars have lost **11.2%** of their numbers year-on-year. This reflects closures from some large bar groups, where large, costly sites have seen a drop in demand. In this part of the market, independents have proved more agile and able to adapt to people's changing late-night needs.

Independent, managed and tenanted sites, December 2024 v December 2023

| | Independent | Tenanted | Managed | Total |
|---------------------------------------|-------------|----------|---------|-------|
| Sites in the late-night economy | -1.5% | -7.9% | -5.1% | -2.8% |
| Sites in the evening economy | +6.1% | -2.9% | +3.7% | +3.9% |
| Sites in the wider night time economy | +0.9% | -2.8% | +0.3% | +0.1% |



Britain's top night time cities

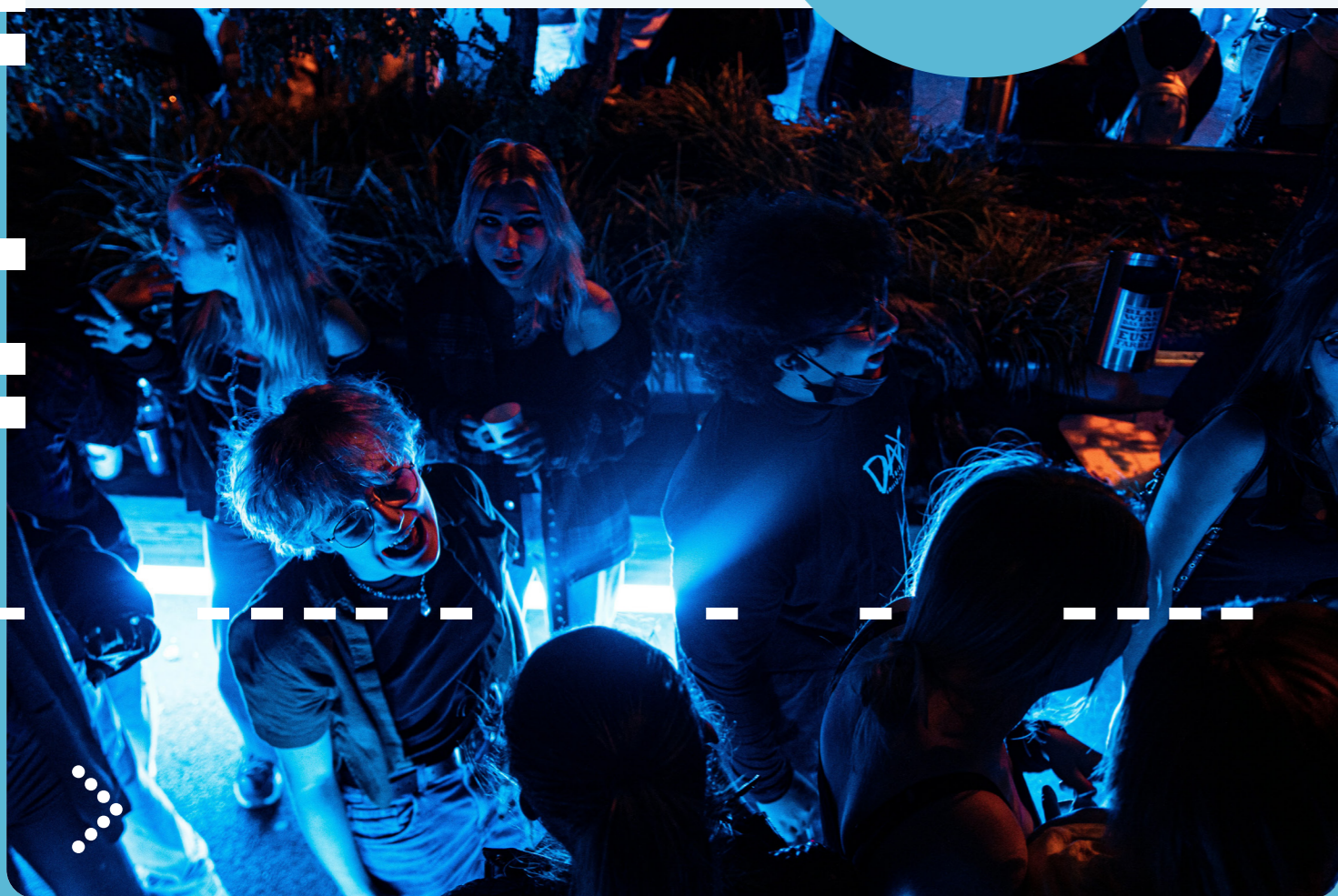
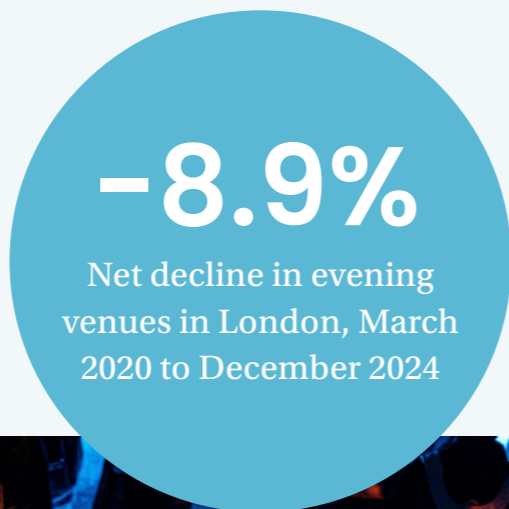
COVID decimated visits to late-night venues in Britain's major cities, but they have proved more resilient than more rural locations. There are **25.2%** fewer late-night sites in town and city centres than there were in March 2020, but the decline was much sharper in rural areas at **34.5%**. Cities remain the heartland of innovation and diversification in the evening economy.

But which of them have the most vibrant night time economies? The evening hours have achieved the most significant growth, and our Monitor data reveals the cities that have most strongly capitalised on this new trade.

Leading the list is London, where night time hospitality is most heavily concentrated. At December 2024, the Greater London region had **2,620** evening-trading premises— **8.9%** fewer than in March 2020 but **3.8%** more than a year previously. This represents a decent recovery from the COVID crisis, when visitor and commuter numbers fell off a cliff. New hybrid working patters and problems with the late-night infrastructure in the capital—especially trains and buses out of the city centre to the suburbs—have made it a long road back, but the capital is returning towards its pre-COVID character.

However, other cities have bounced back faster and further. Liverpool has the most night time venues of any city after London—and after its number rose by **7.8%** in 2024 alone, it makes a strong case for the title of Britain's most vibrant night time city. As this table shows, several other regional cities have grown their night time venues in the last year. In England, Newcastle, Sheffield and Leeds all added more than **4%**, and Scotland's twin hubs of Glasgow and Edinburgh did the same.

These trends show how city centre footfall returned faster to these cities than to London after COVID, and how people were eager to get back to clubs and bars as soon as they could. They also demonstrate the importance of the night time economy to Britain's northern cities in particular.



Britain's top 15 night time cities

Ranked by number of evening venues at December 2024

| | Sites at March 2020 | Sites at Dec 2023 | Sites at Dec 2024 | Change in sites, Dec 2024 v March 2020 | Change in sites, Dec 2024 v Dec 2023 |
|------------|---------------------|-------------------|-------------------|--|--------------------------------------|
| London | 2,875 | 2,523 | 2,620 | -8.9% | +3.8% |
| Liverpool | 411 | 396 | 427 | +3.9% | +7.8% |
| Manchester | 422 | 388 | 396 | -6.2% | +2.1% |
| Glasgow | 375 | 335 | 351 | -6.4% | +4.8% |
| Edinburgh | 341 | 311 | 328 | -3.8% | +5.5% |
| Leeds | 304 | 275 | 286 | -5.9% | +4.0% |
| Birmingham | 315 | 276 | 279 | -11.4% | +1.1% |
| Bristol | 272 | 252 | 258 | -5.1% | +2.4% |
| Nottingham | 259 | 219 | 229 | -11.6% | +4.6% |
| Newcastle | 203 | 193 | 207 | +2.0% | +7.3% |
| Sheffield | 170 | 157 | 175 | +2.9% | +11.5% |
| Brighton | 174 | 163 | 167 | -4.0% | +2.5% |
| Cardiff | 150 | 139 | 143 | -4.7% | +2.9% |
| Salford | 113 | 113 | 120 | +6.2% | +6.2% |
| Oxford | 121 | 110 | 110 | -9.1% | 0.0% |

NTIA NIGHT TIME INDUSTRIES ASSOCIATION

The view from NTIA

The Night-Time Economy Market Tracker Report is an essential tool for understanding the current state and trajectory of our sector. The latest data underscores both the resilience and the challenges facing businesses operating in the night-time economy and the wider leisure industry.

Consumer spending has continued to recover post-pandemic, with total sales reaching **£223.5** billion in 2024, a **2.3%** increase from 2023. The Night-Time Economy saw a **2.5%** growth, while the Night-Time Cultural Economy outpaced the overall market at **3.2%**, demonstrating the continued importance of live music, late-night venues, and cultural spaces. However, this growth is slowing compared to previous years, highlighting the persistent pressures on businesses.

Gross Value Added (GVA) figures indicate stagnation in output productivity, with only marginal changes from 2022 to 2023. This suggests that despite increasing consumer spend, rising operational costs, including labour, food, and drink, have placed significant strain on businesses. Inflationary pressures continue to impact the sector,

About our report

Data in this report is sourced from CGA by NIQ's Outlet Index, the leading database of licensed premises in Britain, with further insight from CGA's range of consumer, business leader and sales measurement solutions. To learn more, visit www.cgastrategy.com or email Reuben Pullan, senior insight consultant, at reuben.pullan@nielseniq.com.

Definitions

'Late-night economy sites' includes venues in the Outlet Index that explicitly operate at late-night hours. They include late-night bars, nightclubs and casinos.

'Evening-economy sites' are defined as venues that are focused on evening operations and entertainment. In addition to the above venues, they include arenas, ballrooms, bar restaurants, bingo halls, cocktail bars, craft bars, educational bars, theatres, themed bars, themed pubs, unthemed high street pubs and wine bars.

preventing businesses from fully capitalising on demand.

Employment trends reflect both resilience and transformation within the sector. The night-time economy remains a vital employer, with workforce numbers reaching 2.1 million in 2023. However, a concerning shift has emerged, with substantial declines in pub and bar employment (from **540,400** in 2022 to **474,300** in 2023) and licensed club employment (from **88,300** in 2022 to **68,200** in 2023). Conversely, employment in sporting venues, clubs, and gyms has grown significantly, reshaping the workforce landscape.

This data reinforces the need for targeted support to ensure the continued success of our night-time industries. Policymakers and stakeholders must recognise the economic and cultural contributions of this sector and take decisive action to address the challenges it faces. Our industry is not just a place of entertainment but a critical pillar of the UK economy, deserving of investment and strategic policy interventions to safeguard its future.

Mike Kill, CEO, Night Time Industries Association

'Wider night time economy sites' provide the broadest view of the industry. In addition to the above, they include food-led and activity-led venues that operate in the evening as well as daytime, like restaurants, local sports clubs, social clubs, cinemas, snooker clubs, street markets, bowling alleys, hotels, casual dining restaurants, community pubs, branded food pubs and unbranded food pubs.

'Total market' includes all licensed premises in Great Britain.

The Night Time Industries Association is the voice of the night time community in the UK. For more about the NTIA and membership, visit www.ntia.co.uk

