



# Navigating The Night: The Quarterly Consumer Tracker

Q4 2025

**OBSURVANT**

**NTIA** | NIGHT TIME  
INDUSTRIES ASSOCIATION



In today's evolving night-time economy, understanding the consumer journey is more important than ever. From the moment someone chooses to engage with our venues, through the experience itself, and all the way to post-visit engagement, capturing and analysing this journey allows businesses to deliver safer, more enjoyable, and more personalised experiences.

Consumer data is at the heart of this understanding. It allows us to evaluate our sector's broader impacts, particularly environmental considerations that are becoming an increasing focus for communities, policymakers, and the public.

This knowledge also strengthens our collective voice. Data-driven insights give the Night Time Industries Association and its members the evidence needed to advocate effectively, to lobby for sensible, supportive policy, and to hold local and national governments accountable.

The work presented in this report represents more than a snapshot of consumer behaviour. It is a powerful tool to guide action, shape strategy, and influence policy. By understanding the forces shaping the night-time economy, we can ensure it continues to thrive sustainably, responsibly, and in a way that serves both our communities and the businesses at its heart.



Foreword by  
Michael Kill, CEO of NTIA



# Navigating The Night: The Quarterly Consumer Tracker

The Night Time Industries Association (NTIA) in partnership with Observant have launched a new national tracking study, beginning with this first wave of research.

The data gives us a starting point for understanding how consumers across the UK feel about and are engaging with the night-time economy. It reflects everything from going to theatres and restaurants to heading out to bars, clubs and late-night events, covering activity between 5pm and 5am.

Completed by 2,009 nationally representative respondents, the insights provide a snapshot of behaviours and confidence in the night-time economy. Running quarterly, the study will build a continuous base, helping us monitor how perceptions evolve and where attention is most needed from a consumer angle.



## The Power of Tracking

The insights validate much of what those within the industry already know. By showing how these attitudes evolve, the research helps reinforce the sector's wider social importance and gives advocates compelling evidence when making the case for protection & support.



## Index Ratings Tracked for Key Areas

We calculate index scores for each NTIA industry pillar to show how public perception is shifting. These scores let us quickly spot changes and explore the attitudes, behaviours, and demographics driving them.



## Data Integrity and Quality

Observant is an accredited MRS company partner, a member of the British Polling Council and signatories of the Global Data Quality Initiative. Insights you can trust, built on the highest quality standards in the research industry.



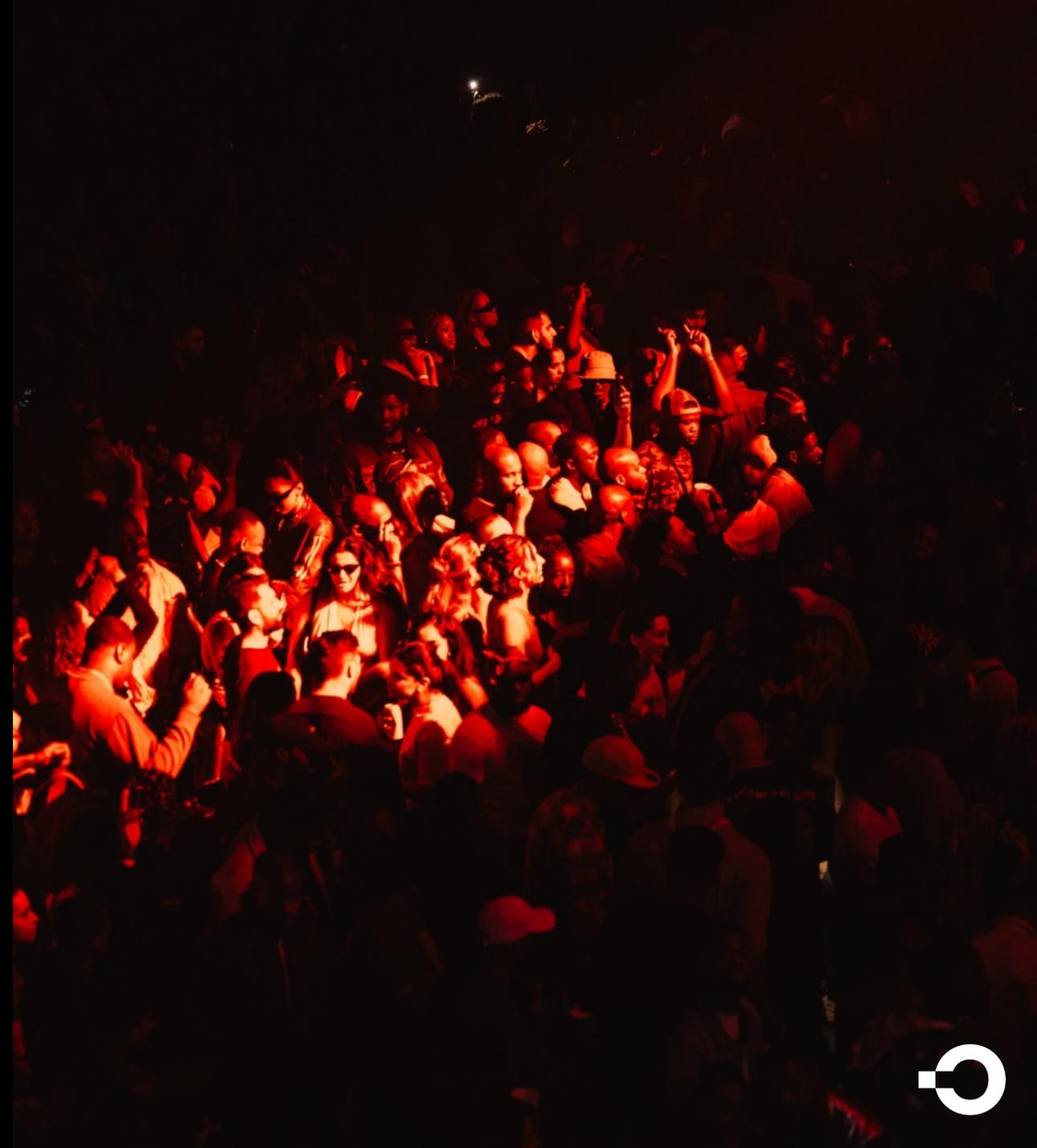
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SECTION 1

# Behaviours, Motivations & Barriers

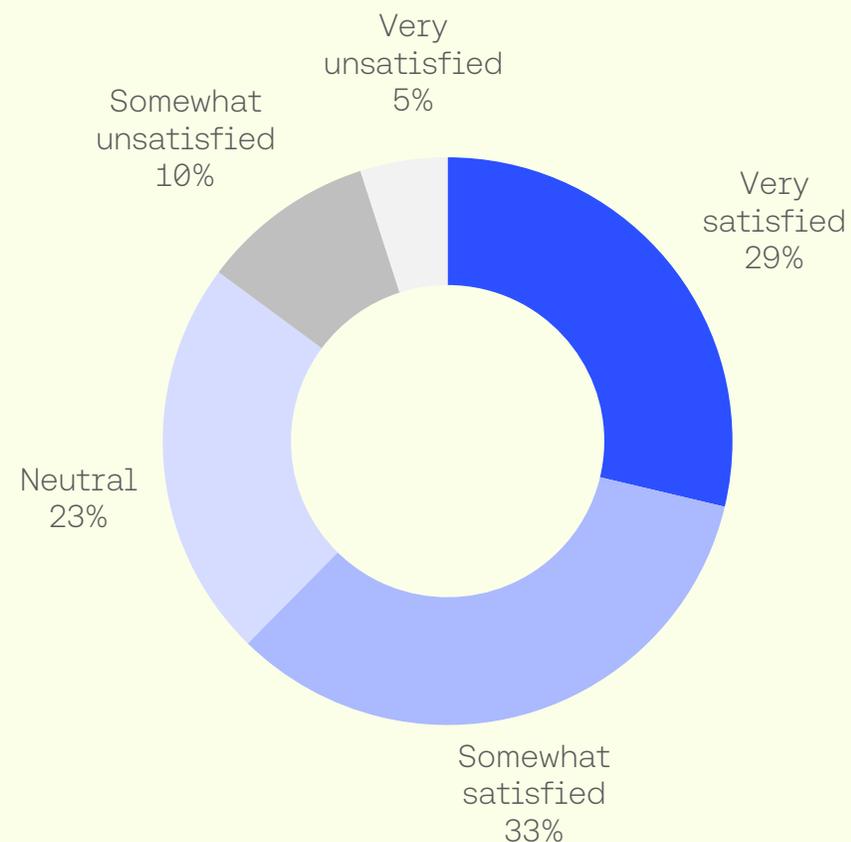


# Attendance Satisfaction

The chart highlights overall satisfaction with the number of night-time events people have attended.

While satisfaction is generally high, fewer than 1 in 3 say they are totally satisfied with how many events they've been to in the past year.

Satisfaction drops further among lower-income groups, pointing to a clear financial barrier to participation.



Q3a: How satisfied, or unsatisfied, do you feel with the number of night-time events (e.g. Live music, theatre, club nights) you have attended this year?  
Base: All respondents aged 18-64 - n=2,009



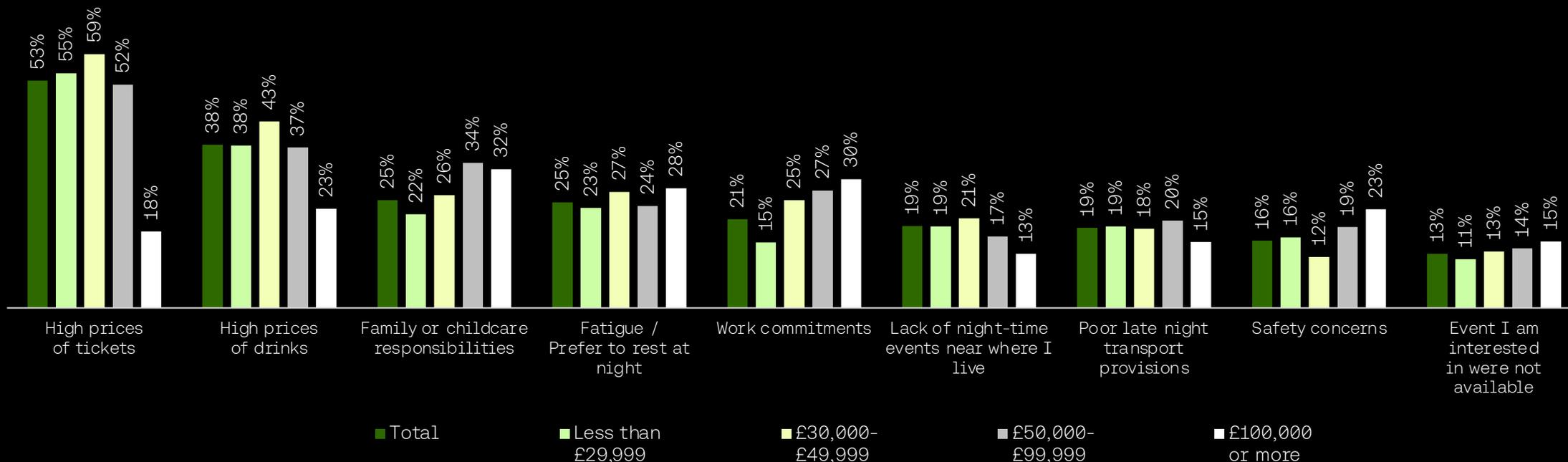


Q3a: How satisfied, or unsatisfied, do you feel with the number of night-time events you have attended this year?



## Barriers to Increased Event Attendance

High ticket and drink prices stand out as the leading barrier for almost everyone except those in the highest income bracket. For most people, financial considerations outweigh concerns about safety, transport, or even the availability of suitable events, making cost the biggest obstacle to attendance.



Q3b: What prevents you from attending more night-time events?  
 Base: All respondents aged 18-64 who are not fully satisfied with how often they go out - n=1,407



SECTION 2

# Affordability

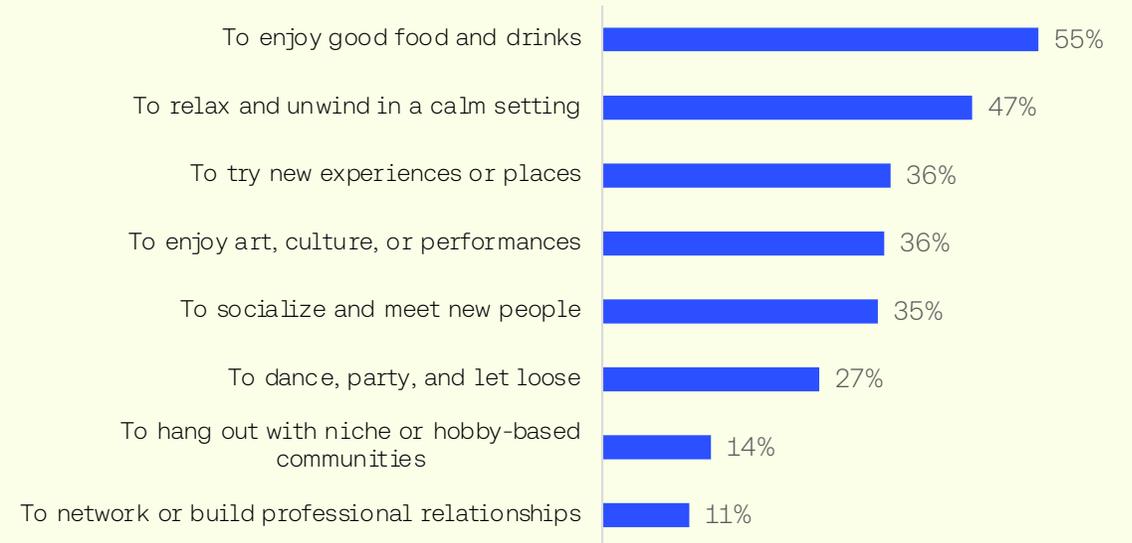




## Motivations for Going Out

Unsurprisingly, motivations differ by age. Younger generations are driven by the desire to socialise, meet new people, and feel connected.

In contrast, older audiences are more motivated by the chance to relax and unwind in a calmer, more comfortable setting.



Q3c: What are your primary motivations for going out at night?  
Base: All respondents aged 18-64 who go out - n=1,851

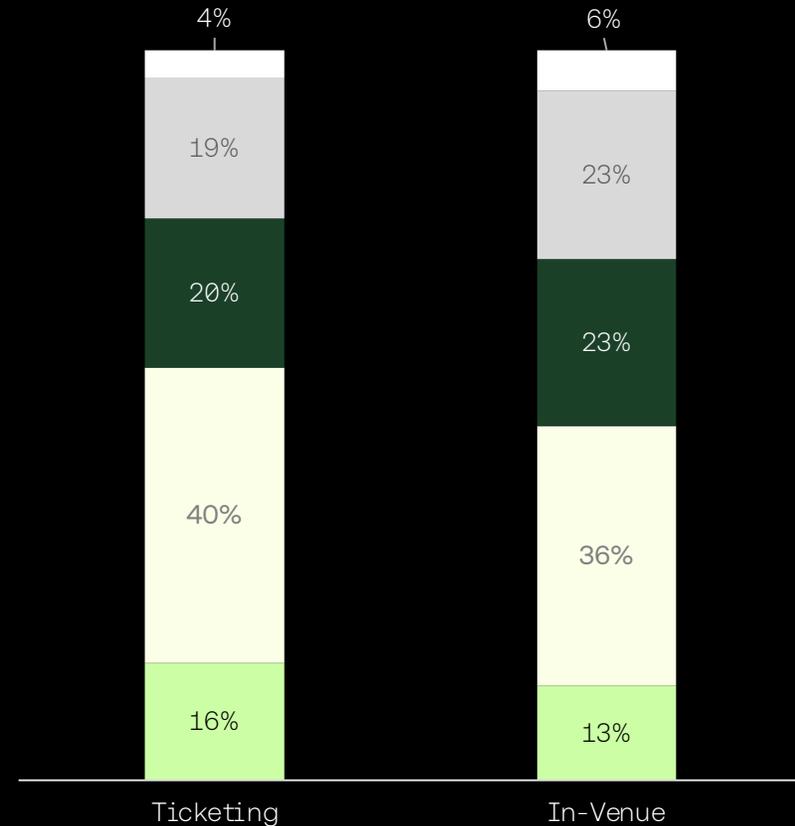


# Ticket & Venue Purchases

Although many people say that tickets and in-venue purchases feel affordable, this picture is heavily influenced by those in higher income groups.

Among individuals with a personal income of less than £30,000, 1 in 3 say that tickets and in-venue purchases are simply unaffordable, highlighting a clear gap in affordability across income levels.

- Very unaffordable
- Fairly unaffordable
- Neither affordable nor unaffordable
- Fairly affordable
- Very affordable



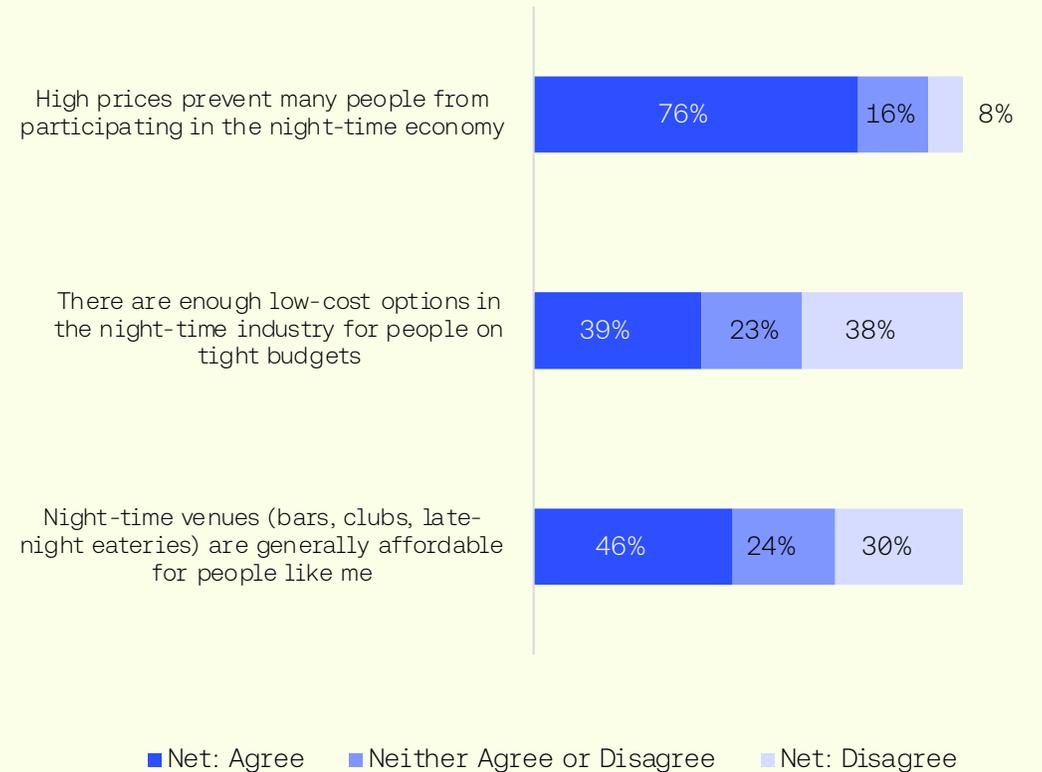
Q4a/Q5a: Thinking about purchasing tickets for night-time events/purchases you made inside venues over the last year, to what extent did you find the ticket pricing affordable?  
 Base: All respondents aged 18-64 who go out - n=1,851



# Nightlife Affordability Statements

There is widespread disagreement that night-time venues are affordable or that suitable low-cost options exist.

Across demographics, many feel that this lack of affordability is actively holding people back from taking part in the night-time economy.



Q6b: For each of the following statements please can you rate how strongly you agree or disagree with each one?  
Base: All respondents aged 18-64 - n=2,009





It can be extremely expensive to go out now, with even soft drinks costing a lot more than they used to. Tickets have gone up as well, as have transport costs. Everything together means that going out is not a weekly thing anymore as it's just not affordable.

25-34-YEAR-OLD, FEMALE  
EAST OF ENGLAND



The cost-of-living crisis is having a major impact on my decision whether to go to various events or not.

45-54-YEAR-OLD, MALE  
WEST MIDLANDS



SECTION 3

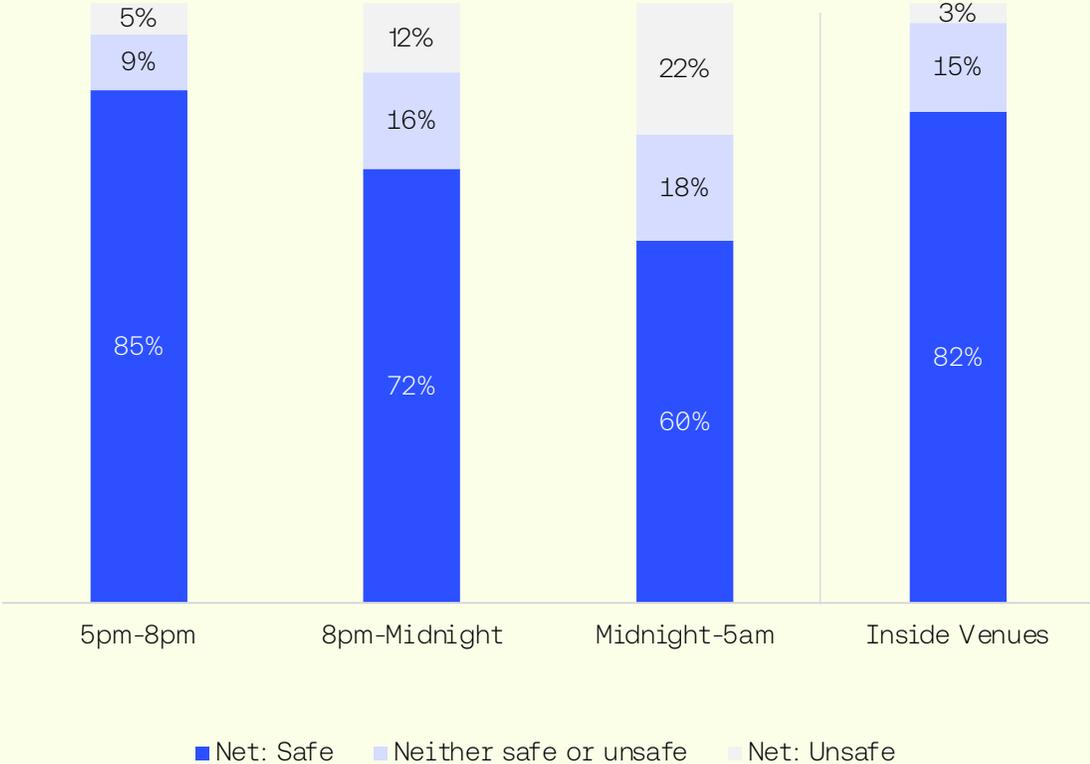
# Safety & Transport



# Safety Perceptions

Concerns about safety rise the later people are out. After midnight, only 3 in 5 of those still out say they feel safe.

By contrast, an overwhelming majority of people attending evening or night-time events feel safe inside venues, with just 3% saying they feel unsafe. This suggests that for those who view safety as a barrier to going out more, the worry is far more about what happens outside venues than within them.

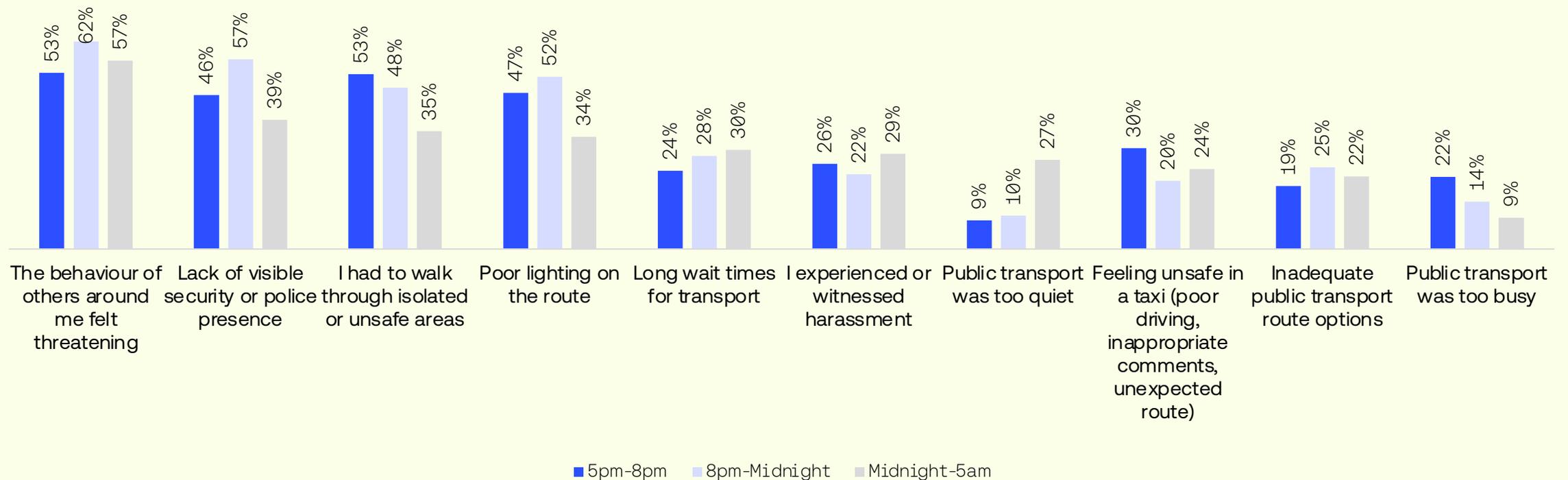


Q8a/9a/10a: Over the last 3 months, to what extent did you feel safe, or unsafe, while travelling to and from your event?  
 Q13: Thinking again about all the times you've been out in the evening or at the night-time events you've attended over the last year, to what extent did you feel safe, or unsafe, while inside the venues?  
 Base: All who have been out in each time-period/location - 5pm-8pm: n=1,330, 8pm-Midnight, n=1,185, Midnight-5am n=324, Inside venues n=1851



# What makes people feel unsafe?

Overall, the reasons people feel unsafe are consistent across time periods, with the behaviour of others being the main concern. Among those out in the late-night economy (midnight–5am), worries about long wait times and quiet public transport stand out even more. And while most people generally feel safe at night, clear and recurring themes emerge when they're asked what affects their sense of safety.



Q8b/9b/10b: You said you felt unsafe while traveling to venues you've attended over the last 3 months, why is this?  
 Base: All who have been out in each time-period/location the last 3 months (5pm-8pm: n=70, 8pm-Midnight, n=131, Midnight-5am n=73)



”

Poor lighting if I am walking home makes me feel unsafe [....] I feel more police presence would be good.

45-54-YEAR-OLD, FEMALE  
NORTH-EAST

”

I felt that good standard street lighting is essential to keeping people safer in the evenings and at night.

25-34-YEAR-OLD, MALE  
WALES

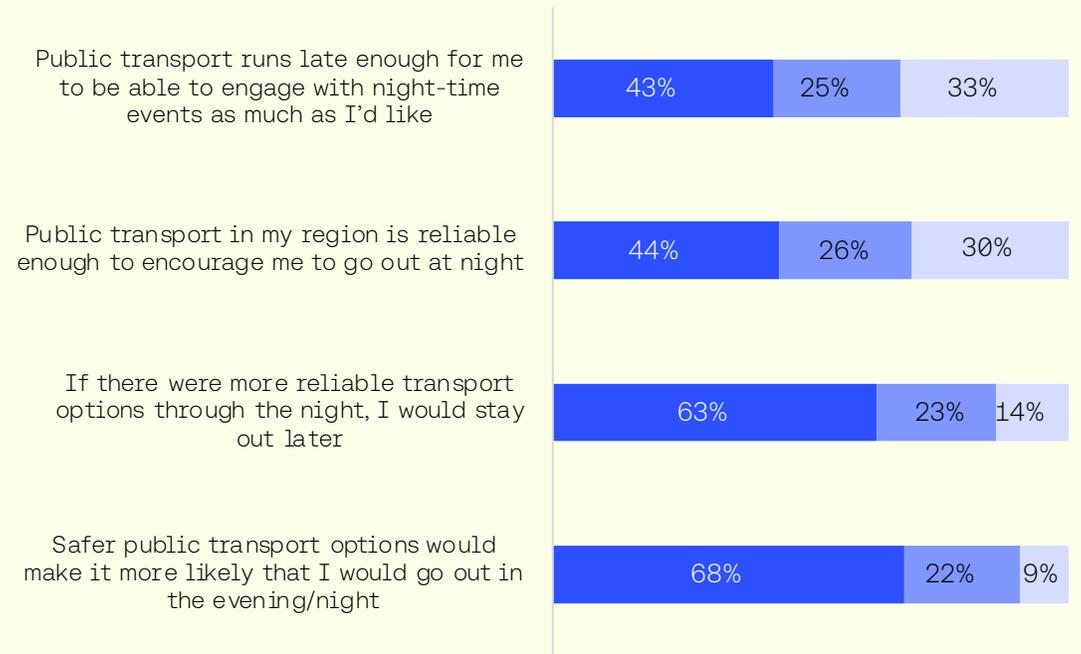


# Transport Statements

There is widespread disagreement that public transport runs late enough or reliably enough, a concern felt even more strongly outside London.

Nationally, most people say that better late-night transport would encourage them to engage more with the night-time economy.

68% agree that having safer public transport options would make them more likely to go out in the evenings or at night.



■ Net: Agree   ■ Neither Agree or Disagree   ■ Net: Disagree

Q11: For each of the following statements please can you rate how strongly you agree or disagree with each one?  
Base: All respondents aged 18-64 - n=2,009



## Transport to and from Night-Time events

Frustratingly, personal vehicles remain the main mode of transport when travelling to and from night-time activities. Use of public transport is highest in London, and lowest in the East Midlands and Wales.

As noted earlier, low trust and reliability in public transport appear to be key factors pushing people toward using their own cars when going out at night.

The main modes of transport when travelling to and from night-time activities are:

Personal vehicle – 33%

Public transport – 26%

Taxi / Rideshare – 25%

Walk – 14%

43%	London
29%	East of England
29%	South East
28%	North West
28%	Scotland
24%	North East
22%	South West
21%	Yorkshire & The Humber
20%	West Midlands
16%	Wales
15%	East Midlands

Base: All who have been out in the last 12 months - n=1,858.



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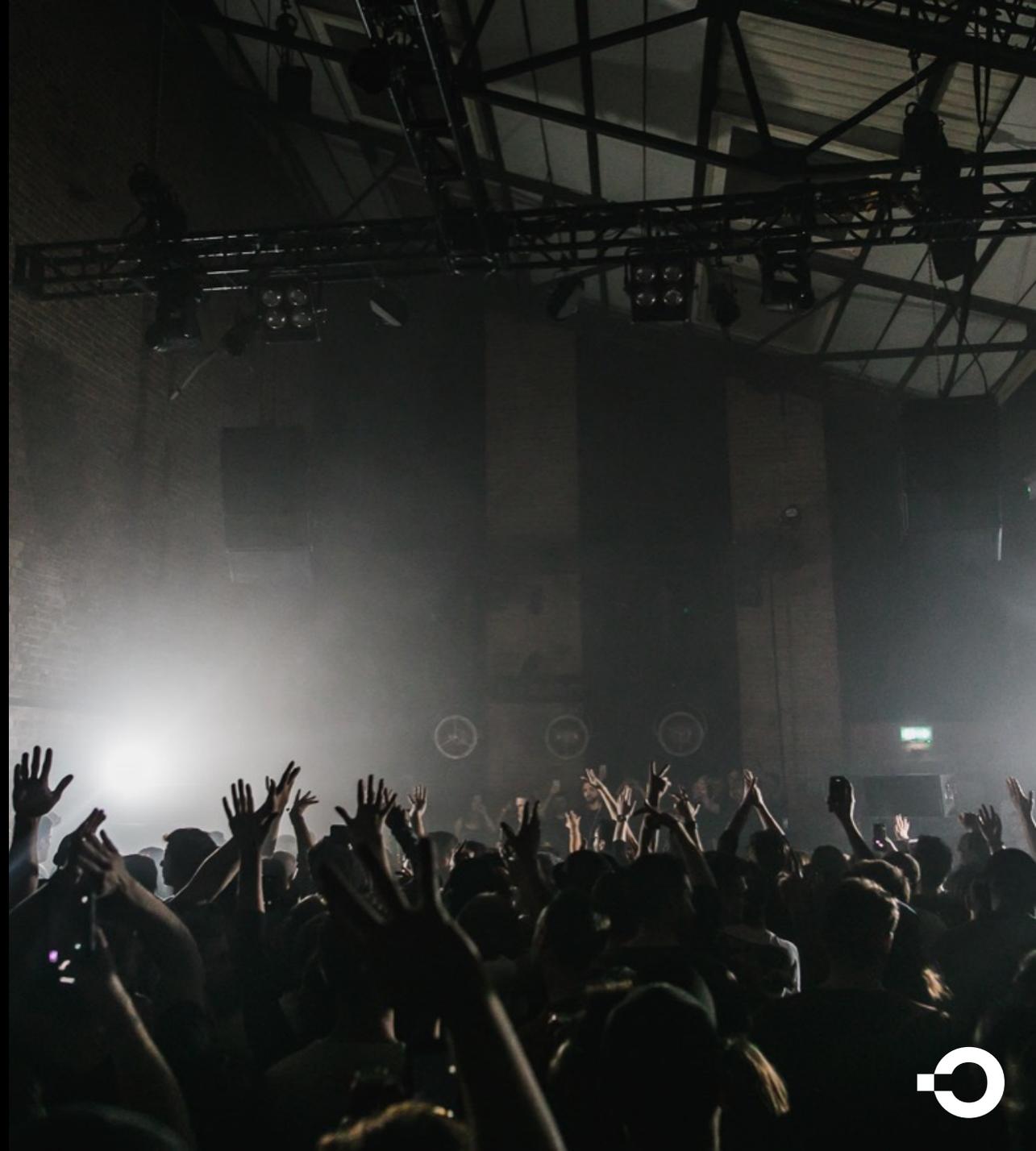
It all needs to be connected;  
the event finish time and the  
transport, be it rail or bus.

55-64-YEAR-OLD, MALE  
NORTH WEST



SECTION 4

# Personal & Cultural Value



# Personal Value Statements

There is broad agreement that nightlife has a positive impact on people’s wellbeing, sense of community, and overall mood.

This sentiment is especially strong among those under 35, who are more likely than older age groups to recognise these benefits.

It highlights the value of the night-time economy not just in financial terms, but in the role it plays in people’s social and emotional lives.

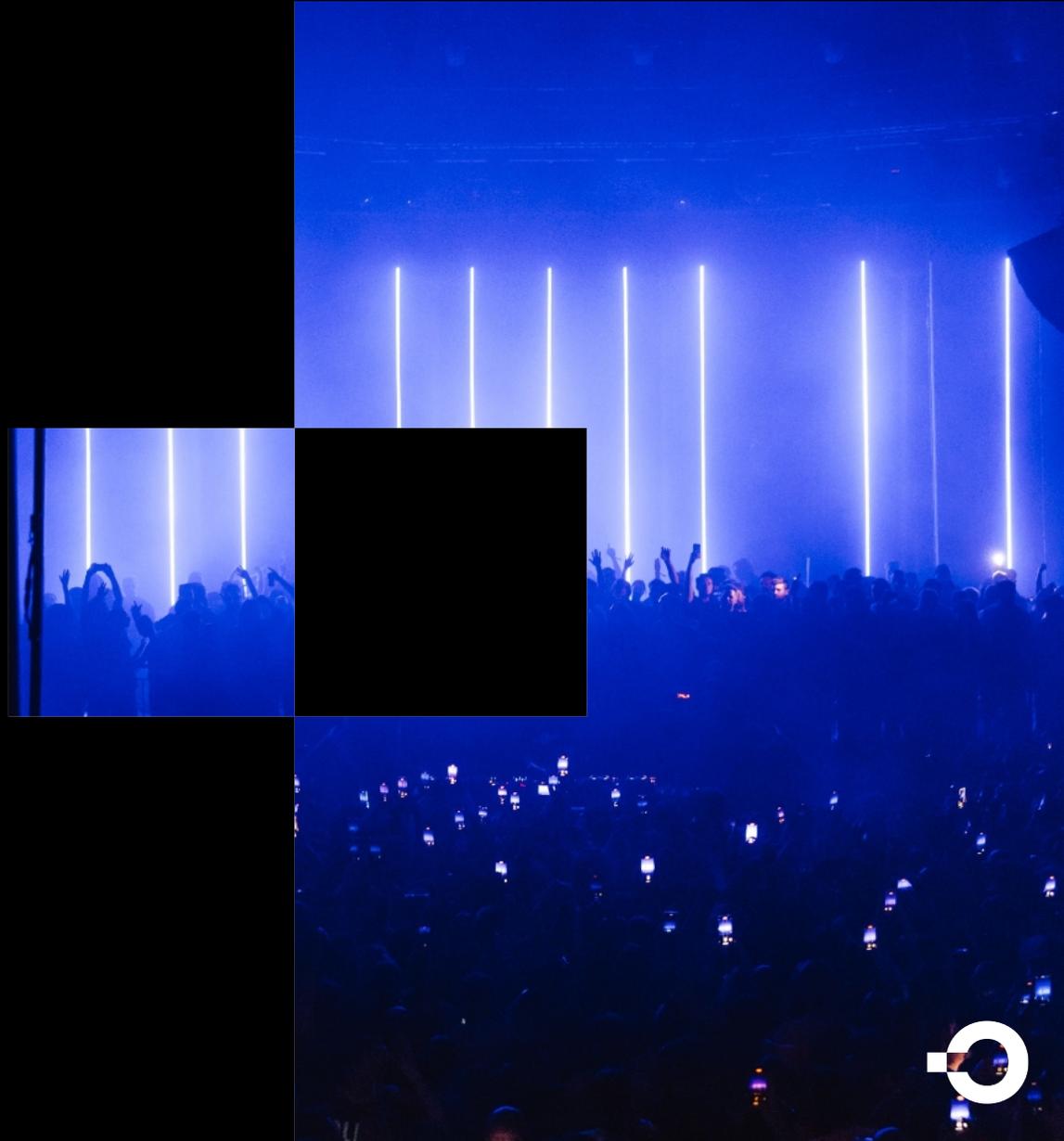
	NET: Agree	NET: Disagree
Experiencing nightlife boosts my overall mood and happiness	65%	12%
I would miss the night-time industry if it were not available in my region	63%	14%
Night-time industry provides valuable cultural experiences for me personally	61%	13%
The night-time industry contributes positively to my sense of community	59%	14%
Night-time industry significantly enhances my quality of life	59%	14%
Night-time industry significantly enhances my quality of life	50%	22%



”

It acts as a stress relief and emotional outlet...from work or other things.

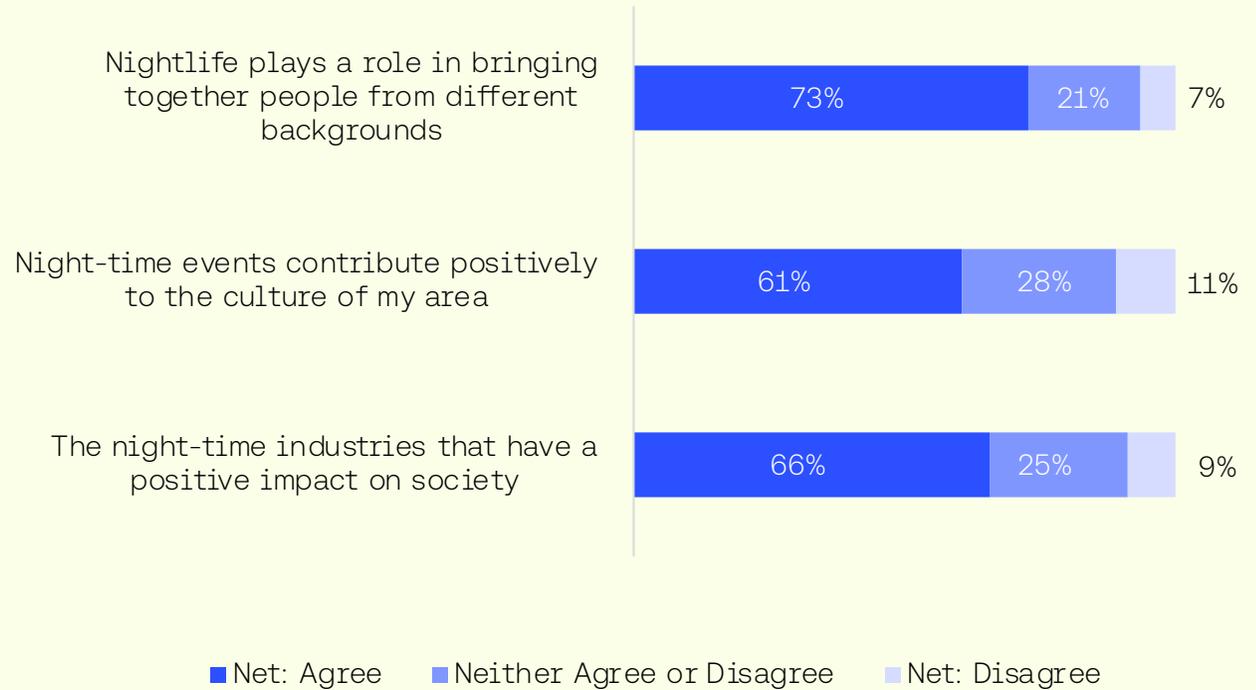
25-34-YEAR-OLD, MALE  
LONDON



# Cultural Value Statements

Beyond the personal benefits, people clearly recognise the wider value the night-time industry brings to their communities and to society as a whole.

There is strong agreement across ages and regions that nightlife plays a meaningful role in local culture and social connection. This reinforces its importance far beyond individual enjoyment.



Q16: For each of the following statements please can you rate how strongly you agree or disagree with each one?  
Base: All respondents aged 18-64 - n=2,009



SECTION 5

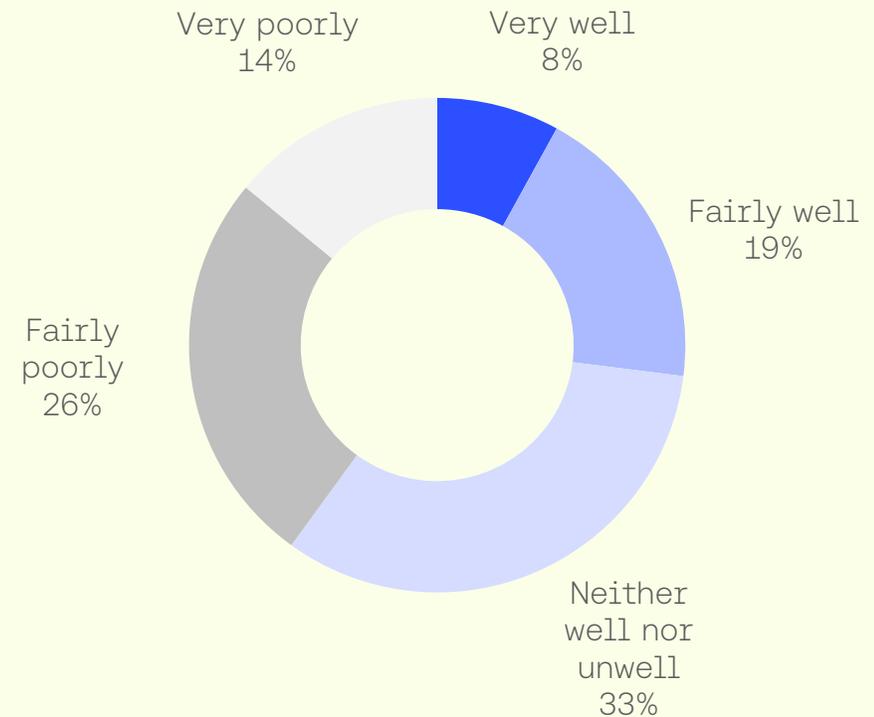
# Government Support



# Government Support of the Night-Time Industries

Overall, there is little belief that the government is supporting the night-time events industry, with 40% rating support as fairly poor or very poor.

But views differ across the country. People in London are the most likely to feel the sector is being supported, while those in the South West and Yorkshire & Humber are the least convinced.

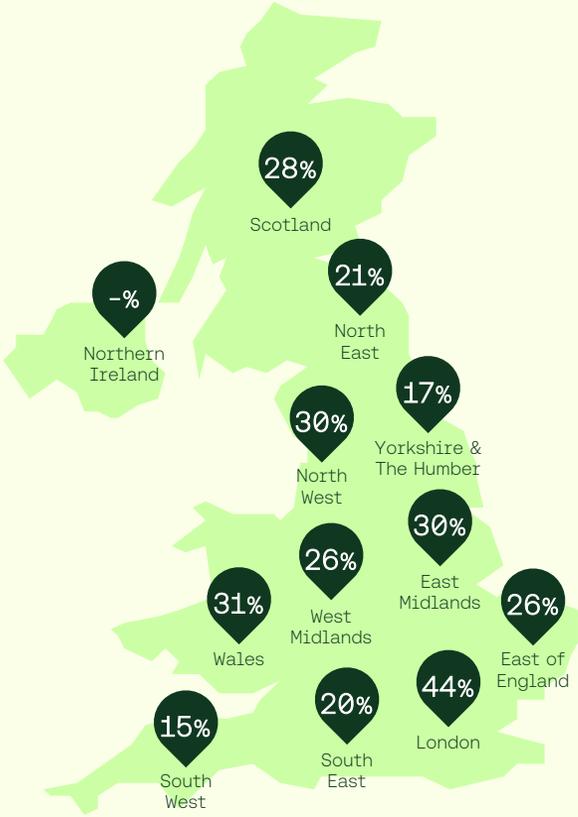


Q6a: How well, or poorly, do you think the government is supporting the night-time events industry?

Base: All respondents aged 18-64 - n=2,009, regional sample size varies per region, all above n=78. \*Base too small for analysis in NI.



# Regional perceptions of how well the night-time industry is supported by the government



% Net: Well

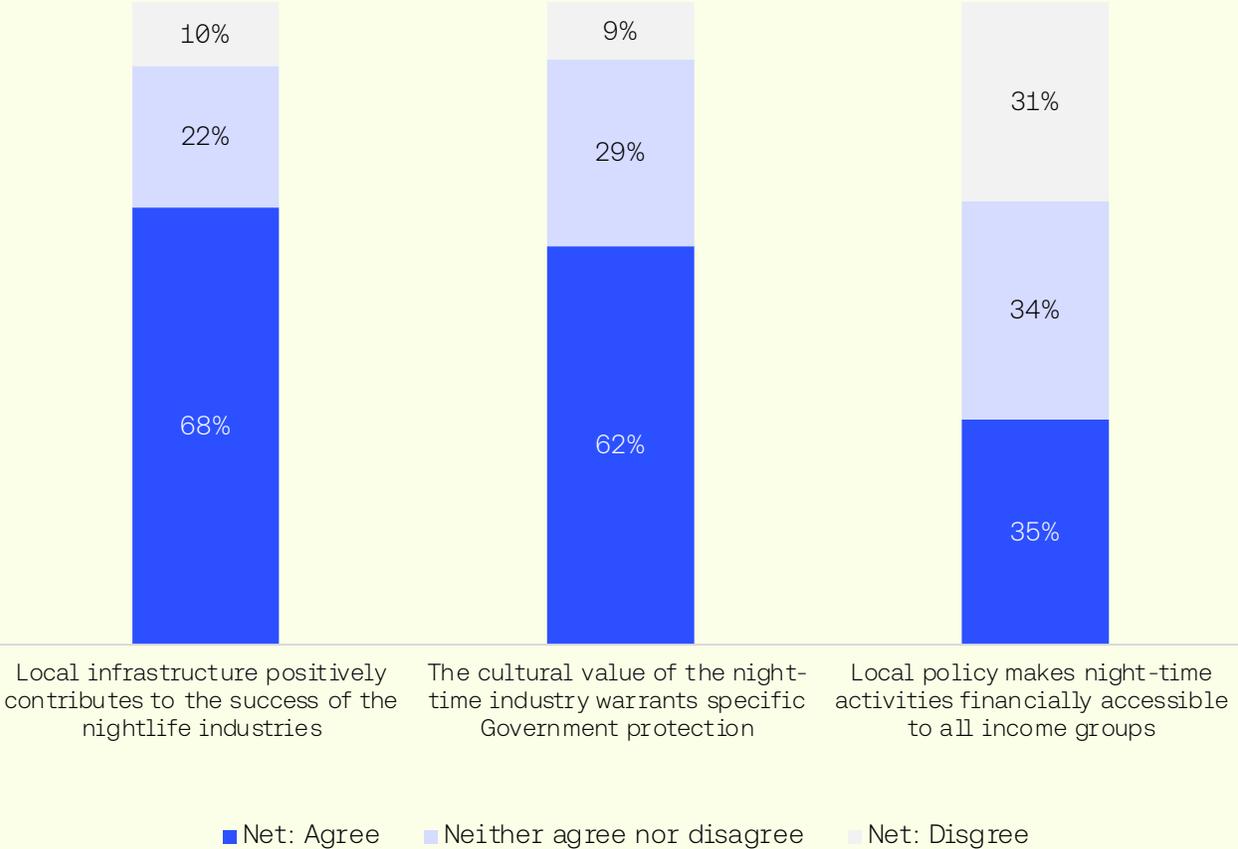


# Local Policy & Infrastructure

Just over a third of people feel that local policy makes night-time activities financially accessible for everyone.

But when we focus on those with the lowest personal incomes (under £30,000), confidence drops sharply and only 28% agree.

This gap highlights how affordability challenges are felt most by those with the least disposable income.



Q11: For each of the following statements please can you rate how strongly you agree or disagree with each one?  
Base: All respondents aged 18-64 - n=2,009



SECTION 6

# Night-Time Consumer Confidence Index



# Night-Time Consumer Confidence Index

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Modelled on the National Consumer Confidence Index, the Night-Time Consumer Confidence Index (NTCCI) measures how people feel about the night-time industries today and their outlook for the future.

It brings together their current behaviours, expected future behaviours, and their expectations for the sector to create a single, trackable metric of consumer confidence.



Present quality in your area



Present availability in your area



Expected future quality in your area



Expected future availability in your area



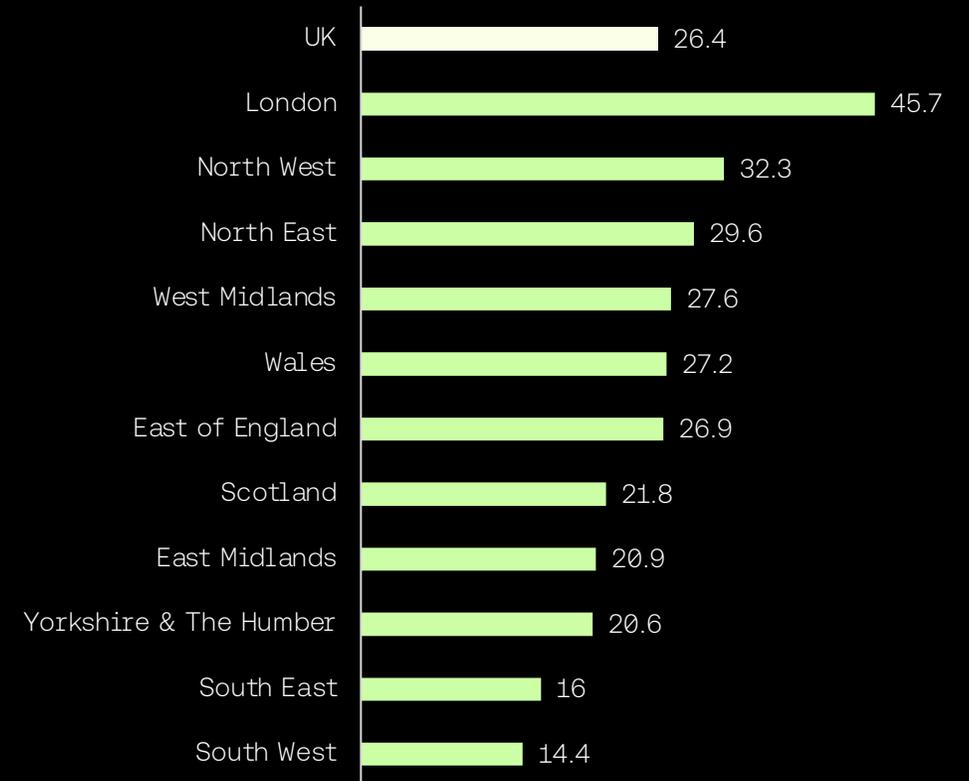
Personal future behavior



# A Regional Look at Consumer Confidence

Confidence in the night-time industry varies significantly by region, with respondents in London feeling far more optimistic than those elsewhere.

Confidence is especially low in the South West and the South East, where scores fall below the rest of the sample across all NTCCI measures except future behaviour.



SECTION 7

# The Budget & Christmas



The public believe The Government should support the sector in the Autumn Budget, but are sceptical that they will.

Q: For each of the following statements please can you rate how strongly you agree or disagree with each one?

66%

Agree that 'The government should use the Autumn budget to support the hospitality sector.'

High agreement across all demographic groups, however Londoners and the highest earners are most likely to agree.

70%

Agree that 'Government policies are making it harder to keep prices in the hospitality sector affordable.'

This statement had unanimous agreement across all demographics.

68%

Are 'Concerned that the Autumn Budget will lead to higher prices in the hospitality sector.'

Significant concern across all demographics.

64%

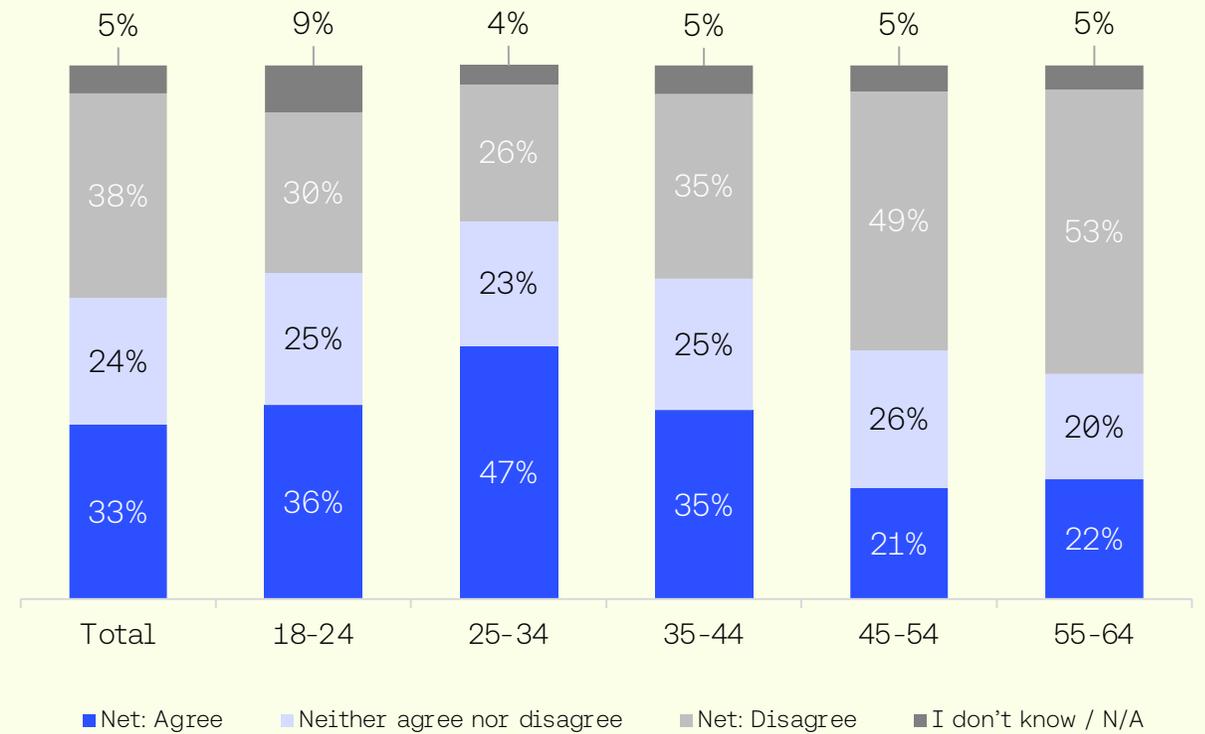
Think that 'VAT rates for the hospitality sector should be reduced in the Autumn Budget to help businesses.'

The vast majority agree that VAT rates for the hospitality sector should be reduced in the Autumn budget.





The government understands the challenges facing the hospitality sector (Agree/Disagree)



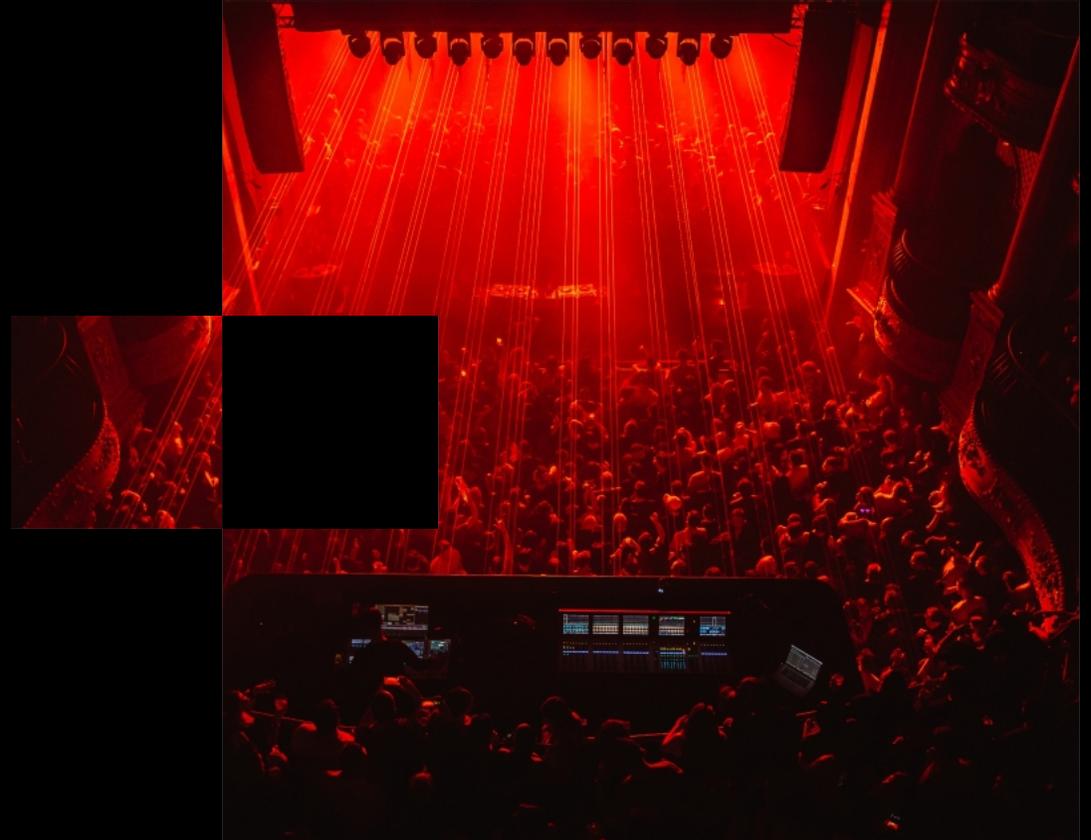
Q23r: For each of the following statements please can you rate how strongly you agree or disagree with each one?  
 Base: All Respondents aged 18-64 - n: 2,009



# Understanding the challenges

In the lead-up to the Autumn Budget, there is very little confidence that the Government understands the challenges facing the sector. A view felt most strongly among older generations.

Regionally, belief in the Governments understanding of the challenges varies significantly: highest in London and drops to its lowest level in the South West, where only 23% agree.



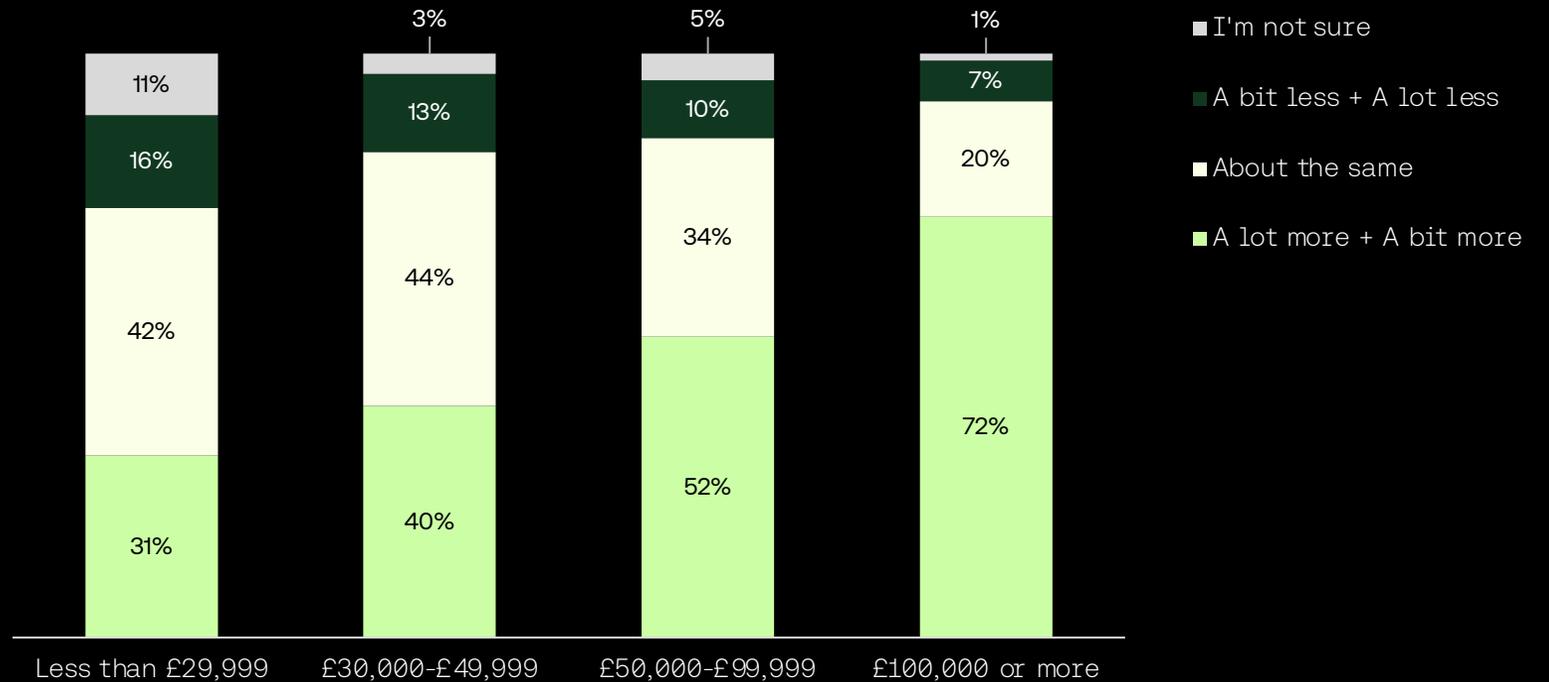
# Late night economy this Christmas

Public optimism around going out this Christmas falls as income decreases

Respondents were asked:

Over the up-coming Christmas period are you planning on going out (to e.g. pubs, bars, restaurants, clubs, events, theatres etc.) more or less than you did last Christmas?

Overall, there's a clear expectation of increased festive activity: 40% say they'll go out more or a lot more than last Christmas, while a further 39% expect to go out about the same amount.



Base: All respondents aged 18-64 - n=2,009



# Summary & looking ahead.

Our data highlights the positive social, economic and cultural impact of the night-time economy in the UK. However, the industry is clearly intertwined with pressing issues and barriers for consumers.

Younger audiences, who are most likely to engage with the night-time economy and seek connection and community, face increasing blockers. Cost remains a major factor, especially for lower-income groups, and confidence in the sector varies widely across the UK, with London more positive than other regions. While most feel safe inside venues, concerns rise after midnight, particularly around transport. Despite these challenges, there is broad consumer recognition throughout the survey results of the sector's importance.

With further rounds of research the Night-Time Consumer Confidence Index will highlight how attitudes and engagement are shifting over time.



# Research Methodology

Between 6<sup>th</sup> – 10<sup>th</sup> November 2025, Obsurant conducted an online survey on behalf of the Night Time Industries Association (NTIA).

The survey achieved 2,009 completed responses, aligned to a nationally representative sample plan. Minor weighting adjustments were applied to age, gender, and region to ensure comparability with future waves of research, with age and gender weighting interlocked.

Fieldwork was hosted by Obsurant and respondents were able to complete the survey across all device types. Statistical analysis was applied to the final dataset and accompanying tables.

Additionally, text analysis was used to identify key themes emerging from open-ended qualitative responses.



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