Valuing Our Night-Time Economy

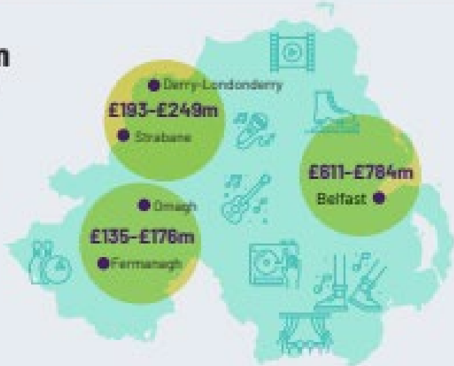
February 2026

Ipsos and Nordicity

VALUING OUR NIGHT-TIME ECONOMY

Gross Value Added of Northern Ireland's night-time economy

The night-time economy in Northern Ireland contributed between **£2.8 and £3.7 billion** in Gross Value Added (GVA) in 2024, supporting between **101,000** and **114,000** full-time equivalent jobs.



Belfast's night-time economy is the largest in the region, contributing **£611-£784m** in GVA, Derry and Strabane contributed **£193-£249m** in GVA, and Fermanagh and Omagh contributed **£135-£176m** in GVA.

The lower bound estimate reflects direct and indirect contributions. Upper bound reflects direct, indirect and induced estimates.

Stakeholder views on the night-time economy

"We have a vibrant arts, culture, events, we have a fantastic hospitality scene. We have the ingredients."

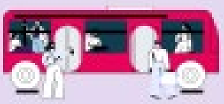
"You don't get a UNESCO City of Music status without there being something behind that. They love the Irish story. They love the Irish culture, the music, the people."

"Let's not try and copy [other cities], let's learn from other people, but also then create our own product... Our night-time economy is the people that live here and the people that visit here."

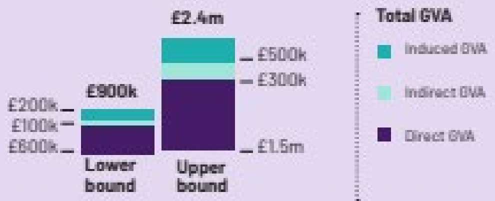
"I think...[late night transport] would be transformational"

Potential benefits of interventions to support the night-time economy

Extending late night public transport in Belfast could contribute an additional **£900k** to **£2.4m** in total GVA annually. This includes direct and indirect estimates between **£730k** to **£1.9m** annually.



Estimated additional GVA impact from late night public transport



Arts investment in Northern Ireland is **£5.07** per capita, compared to **£10.51** in Wales and **£21.58** in the Republic of Ireland.

Large cultural festivals, such as Culture Night Belfast could generate between **£1.3m** and **£3.3m** in additional GVA. Direct and indirect impacts are between **£1m** to **£2.6m** annually.

Contents

This report has been conducted by Ipsos (Dr Ricky Lawton, Jack Philips, Abigail Lyons, Adam McGleave, and Jayden Cox) and Nordicity (Dustin Chodorowicz, Stephen Hignell, and Louis Underwood).

The lead authors of the Independent Review of the liquor licensing system in NI (Dr. James Nicholls and Prof. Niamh Fitzgerald) have provided editorial input to this report on matters of evidence relating to that review. They provided an initial review of the general approach to the Surrender principle but did not have access to the underlying data, nor provide full peer review of other parts of the report. The views and findings outlined in this report remain those of the authors and are not necessarily endorsed by Dr. Nicholls or Prof. Fitzgerald.

Executive summary

This research commissioned by the Department for the Economy, Tourism NI, and the three Belfast Business Improvement Districts (BIDs) provides an in-depth analysis of the economic contribution and potential growth of the Northern Ireland night-time economy (NTE). This study predominantly focuses on Belfast but also considers other significant urban centres like Derry-Londonderry and Enniskillen[1].

Since the 1990s, the night-time economy has contributed substantially to employment, tourism, and recreational opportunities. Analysis of consumer spending and other economic variables shows that the night-time economy contributed an estimated £2.8 billion - £3.7 billion in total Gross Value Added (GVA) in 2024[2].

The night-time economy also supports between 101,000 to 114,000 full-time equivalent (FTE) jobs. Belfast's night-time economy is the largest in the region, contributing between £611 million and £784 million in GVA and supporting between 23,000 to 26,000 jobs[3]. While this is less than a quarter of the overall night-time economy for Northern Ireland, it reflects the geographic distribution of both employment and businesses operating in night-time economy industries across Northern Ireland.

However, interviews with key stakeholders (in governance, transport, hospitality etc.) provide evidence that the expansion of the night-time economy is being hampered by several challenges[4]. A major constraint is the transportation infrastructure, which poses accessibility and safety challenges, particularly for vulnerable groups. Additionally, current licensing laws are seen as a barrier to market entry and diversification. The study also highlights workforce shortages and rising costs in the hospitality sector as continuing challenges.

Despite these challenges, the study identifies several opportunities for growth. Modelling of the Belfast night-time economy suggests that extending late-night public transport could contribute between £900,000 to £2.4 million in GVA to the city's economy, annually[5]. Careful reform of licensing laws could enable easier market entry and foster diversification with minimal impact, if any, on alcohol-related harm. Illustrative analysis suggests that reform could support an economic contribution between £2.4m - £4.8m in Belfast[6]. Moreover, there is potential to diversify the offerings of the night-time economy beyond traditional hospitality and alcohol-centric activities. To illustrate the scale of this potential, estimates

---

[1] Where possible, analysis is reported across the geographic areas of Belfast, Derry-Londonderry, and Enniskillen. However, due to data availability constraints, some analysis is reported at the Local Government District level for Derry and Strabane, and Fermanagh and Omagh.

[2] The lower bound estimate reflects direct and indirect (supply chain) contributions, and the upper bound reflects direct, indirect and induced (household spending) estimates. Analysis considers the full scale of the night-time economy, as per the standard ONS definition of night-time industry SIC codes, including industries beyond those associated with and late-night hospitality such as health and social care and retail.

[3] The lower bound estimate reflects direct and indirect (supply chain) contributions, and the upper bound reflects direct, indirect and induced (household spending) estimates. Analysis considers the full scale of the night-time economy, as per the standard ONS definition of night-time industry SIC codes, including industries beyond those associated with and late-night hospitality such as health and social care and retail.

[4] Interviews covered stakeholders who were actively involved in the night-time economy, had awareness of what the challenges and barriers are and were directly impacted by these barriers. The list of key stakeholders were agreed with alongside the Department for the Economy.

[5] This estimate includes direct, indirect and induced GVA estimates. Direct and indirect impacts are between £730,000 to £1.9m annually. It should be noted that results were estimated prior to the announcement of the late-night bus pilot in Belfast in October 2025.

[6] As noted in the Stirling review, it is not possible to definitively quantify the business impact of abolishing or reforming the surrender principle, since there is no directly comparable system. Therefore, this figure represents a simplified scenario which assumes an increase in pubs and revenue. This analysis also excludes the wider social and fiscal costs of any changes to licensing rules, which fall outside the GVA assessment. This estimate includes direct, indirect and induced GVA estimates. Direct and indirect impacts are between £1.9m to £3.8m annually.

suggest that a single event like Culture Night in Belfast could contribute between £1.3 million and £3.3 million in additional GVA to the city's economy[7].

It should be noted that the scenario analysis estimates the potential broad-order Gross Value Added (GVA) effects that could be anticipated. These estimates are intended to inform analytical research and support future policy development, but they do not constitute a comprehensive appraisal in line with HM Treasury's Green Book. Although the estimates include adjustments for displacement and deadweight, they are not a full welfare assessment and should not be interpreted as net economic impact without considering other factors such as substitution, and capacity constraints.

By leveraging Northern Ireland's unique cultural identity, the region could attract visitors who might stay longer, thereby generating increased economic impact. The report underscores the importance of a coordinated approach involving various stakeholders including government entities, businesses, transport providers, and cultural organisations. Such collaboration is deemed crucial for unlocking the full potential of Northern Ireland's night-time economy.

[7] This estimate includes direct, indirect and induced GVA estimates. Direct and indirect impacts are between £1m to £2.6m annually.

1 Introduction

The night-time economy in Northern Ireland has grown substantially since the 1990s. The peace in Northern Ireland following the Good Friday Agreement and the end of 'The Troubles' has created a stable, attractive environment where night-time activities can flourish. Today, the night-time economy provides jobs, attracts visitors, creates opportunities for recreation, and contributes to people's pride of place.

This enhanced focus is not unique to Northern Ireland; cities throughout Europe and further afield are recognising the value of their evening and night-time offerings. Research in other major European cities have found that their night-time economies are significant drivers of urban economies, generating billions in revenue[8] and supporting numerous jobs[9]. In addition, they provide essential platforms for artists, musicians, performers, and cultural practitioners to showcase their work, enriching the cultural fabric of cities[10].

1.1 Overview of the night-time economies in Belfast, Derry-Londonderry and Enniskillen

This research focuses on the night-time economy in three key geographies:

- **Belfast**'s night-time economy consists of a wide range of attractions for visitors and locals. The city is known for its lively pub and bar scene, with establishments offering live music, dancing, and atmosphere. Belfast also has several nightclubs catering to different music tastes. In terms of hospitality, the city offers a range of restaurants open late, serving various cuisines, with many eateries located around the city centre. The city's theatres, such as the Grand Opera House, have evening performances and shows, while accommodations like hotels and hostels are available in the city centre for those needing a place to stay.

- **Derry-Londonderry** is home to many traditional Irish pubs and live music. Whilst Derry-Londonderry has venues catering to those seeking dancing and DJ events, these are more limited compared to Belfast. Restaurants offer late-night menus with the region's local produce. Locations such as The Derry Walls and the Peace Bridge are key visitor attractions, and regular evening events take place at venues like the Millennium Forum, Waterside Theatre, and The Playhouse. Derry-Londonderry also hosts annual festivals, such as the City of Derry Jazz & Big Band Festival and Derry Halloween.

- **Enniskillen**'s night-time economy is relatively compact and walkable, with traditional Irish pubs with regular live music events. The town has limited nightclub offerings but benefits from a selection of restaurants. The Ardhowen Theatre programmes evening drama, comedy and music, and the town-centre cinema runs late screenings. Enniskillen Castle hosts occasional after-hours events, and the Buttermarket stages seasonal markets. Headline events include Festival Lough Erne, FLive and Beckett-themed Happy Days programming, plus Halloween fireworks.

Across all three geographies, the night-time economies face potential limitations, such as limited public transportation options late at night, with bus and train services ending around midnight. Taxis can be

---

[8] NTIA: NTE Report 2023
[9] Creating a Healthy Night-Time Economy: Key Culture Indicators for World Cities. BOP Consulting
[10] urbact.eu: Cities After Dark Baseline Study and Network Roadmap

expensive and have long waits on busy nights. In Enniskillen and Derry-Londonderry, there is more of a focus on traditional pubs and restaurants, with fewer dedicated late-night venues like nightclubs or cocktail bars. Additionally, the smaller population and visitor numbers result in a quieter night-time economy compared to larger towns and cities, such as Belfast.

1.2 Strategic context and rationale for this research

Against this backdrop of growth and challenges, there is a need for a robust evidence base to guide future policy and investment. This research has been commissioned by the Department for the Economy, Tourism NI, and the three Belfast Improvement Districts (Cathedral Quarter BID, Linen Quarter BID, and Belfast One) to support the economic priorities outlined in the Economy Minister's vision for Northern Ireland[11]. By assessing the night-time economy, this research will provide crucial evidence relevant to each of the priorities:

- **Create good jobs.** The research provides a robust estimate of the number of jobs supported by the night-time economy. The research not only quantifies the direct employees in night-time venues, but also the indirect jobs in the supply chain and induced jobs.

- **Promote regional balance**. The research provides a comparative analysis of the night-time economies in Belfast, Derry-Londonderry, and Enniskillen[12]. This approach allows for a nuanced understanding of the economic contributions and challenges present in each distinct geography.

- **Raise productivity.** This research identifies and assesses the potential economic contributions of key interventions designed to enhance the economic value of the night-time economy. By highlighting the potential impacts of each intervention, the study provides some quantitative evidence to support decision making to boost the sector's overall economic output.

- **Decarbonisation.** The research focuses on interventions such as public transport, which have lower carbon emissions than other transport options, although calculations of the carbon values associated with different scenarios are outside of the scope of this report.

1.3 Research approach and objectives

Ipsos and Nordicity have undertaken primary and secondary research to meet three primary objectives:

- **Assess the current economic value** of Northern Ireland's night-time economy (primarily of Belfast but also the district council areas of Derry and Strabane, and Fermanagh and Omagh, which correspond to the local areas of Derry-Londonderry and Enniskillen). This estimate is assessed through quantitative modelling of publicly available data from Tourism NI, Belfast City Council, Derry City and Strabane District Council, ONS, NISRA, Consumer Council.

- **Identify issues facing the respective night-time economies** in the above regions, identified through in-depth qualitative interviews, to understand the primary challenges and opportunities, and gather insights on the sector's future. The sampling approach employed involved snowball sampling from a

[11] Minister's Economic Vision
[12] Due to data availability constraints, some analysis is reported at the Local Government District level for Derry and Strabane, and Fermanagh and Omagh.

contact list provided by the client group. This list was further stratified into key sectors to ensure diverse representation and address specific research objectives.

- **Provide recommendations on policy options** that could enhance the value of the night-time economy in Northern Ireland. This has been estimated using scenario analysis to model the potential economic contributions of policy options.

2 Estimated gross value added of the Northern Ireland night-time economy

Summary of findings

In Northern Ireland, the night-time economy contributed between £2.8 billion to £3.7 billion in Gross Value Added (GVA) in 2024, supporting between 101,000 and 114,000 full-time equivalent (FTE) jobs. The lower bound estimate reflects direct and indirect contributions through businesses operating at night and their supply chains. The upper bound reflects additional contributions from employee spending.

This economic contribution is fuelled by £3.4 billion in annual consumer spending. GVA is calculated by combining spending from Northern Ireland residents and tourists in key night-time sectors such as food and beverage, accommodation, transport, and recreation.

Belfast's night-time economy is the largest in the region, contributing between £611 million and £784 million in GVA and supporting between 23,000 and 26,000 jobs. This significant impact is driven by £761 million in annual consumer spending within the city's night-time cultural and leisure sectors.

The research also quantifies the substantial economic importance of the night-time economy in other key regional centres. In Derry and Strabane, the night-time economy contributed between £193 million and £249 million in GVA and supported between 7,000 and 8,000 jobs. In Fermanagh and Omagh, the night-time economy contributed £135 million to £176 million in GVA, and supported 5,000 to 5,600 jobs, highlighting its role in supporting regional balance.

This section presents estimates of the Gross Value Added of the Northern Ireland night-time economy, utilising Nordicity's Economic Impact model to produce direct, indirect and induced estimates for the Local Government District areas of Belfast, Derry and Strabane, and Fermanagh and Omagh. Due to data availability constraints, these districts are used as the closest available geographic proxies for Derry-Londonderry and Enniskillen.

2.1 Methodology

Defining the night-time economy

This analysis uses the ONS Night-Time Economy Report, 2022 definition of the night-time economy.[13] The definition of 'night', therefore, is everything between 6pm and 6am, and industries are included if they have a higher-than-average proportion of employees classified as 'night-time workers' as per the ONS Quarterly Labour Force Survey. They are then grouped into four 'night-time economy' categories:

[13] ONS: The night-time economy, UK: 2022

1 Cultural and leisure activities

2 Activities which support night-time cultural and leisure activities

3 24-hour health and personal social services

4 Activities that support wider social and economic activities

The model provides outputs for the first two categories; the cultural and leisure elements of the night-time economy and its supporting industries.

Wider supporting industries in the remaining two categories are captured to some extent in the indirect and induced economic estimates.

Table 2.1: Categorised night-time economy industries, 3-digit SIC 2007 codes, 2024

Cultural and leisure activities	Activities which support night-time cultural and leisure activities	24-hour health and personal social services	Activities that support wider social and economic activities
Hotels and similar accommodation	Retail sale in non-specialised stores	Provision of services to the community as a whole	Animal production
Restaurants and mobile food service activities	Retail sale via stalls and markets	Hospital activities	Mixed farming
Event catering and other food service activities	Passenger rail transport; interurban	Other human health activities	Manufacture of other food products
Beverage serving activities	Other passenger land transport	Residential nursing care activities	Manufacture of plastic products
Private security activities	Holiday and other short-stay accommodation	Residential care activities for learning disabilities, mental health and substance abuse	Manufacture of other special-purpose machinery
Creative; arts and entertainment activities	Camping grounds; recreational vehicle parks and trailer parks	Residential care activities for the elderly and disabled	Manufacture of motor vehicles
Libraries; archives; museums and other cultural activities	Other accommodation	Social work activities without accommodation for the elderly and disabled	Wholesale of food; beverages and tobacco
Gambling and betting activities			Freight transport by road and removal services

Cultural and leisure activities	Activities which support night-time cultural and leisure activities	24-hour health and personal social services	Activities that support wider social and economic activities
Sports activities			Passenger air transport
Amusement and recreation activities			Warehousing and storage
			Support activities for transportation
			Other postal and courier activities
			Publishing of books; periodicals and other publishing activities
			Motion picture; video and television programme activities
			Sound recording and music publishing activities
			Veterinary activities
			Activities of call centres
			Other education
			Activities of other membership organisations

Source: ONS. Notes: The selection of 3 digit SIC codes mirror the standard ONS definition of the night-time economy and encompasses the full extent of activity. While the first two categories represent the activity that would intuitively be understood as the night-time economy (industries associated with nightlife, including pubs, bars and theatres), the other two categories are included within this analysis to more accurately assess the full scale of economic impact generated by the night-time economy.

Excluding SIC codes such as hospital activities (where night shift workers represent a significant proportion of the workforce) would underestimate the true scale of economic contribution.

MyEIA™ model

Nordicity's MyEIA™ Model is an in-house model to estimate the economic contributions of organisations, industries, and government programmes and policies. The MyEIA™ model used in this analysis is based on NISRA's 2019 supply and use tables[14], and 2024 median wages available in the ONS Annual Survey of Hours

[14] Supply and use tables, sometimes referred to as input-output tables in other jurisdictions, are balance tables showing the relationship between components of value added, industry inputs and outputs, and product supply and demand. They are a recognised source for the data underlying gross domestic product (GDP). It should be noted that Supply Use tables used are pre- Covid-19.

and Earnings (ASHE). It provides estimates of direct, indirect and induced contributions on employment[15], compensation of earnings (COE), gross value added (GVA)[16] and tax revenue.

Additionally, Flegg Location Quotients (FLQs) based on the supply and use tables for Northern Ireland and the regional workforce sizes were used to model the local contributions in the three-priority metropolitan areas. GVA analysis is reported in two steps: inputs to the model (consumer spend) and GVA outputs (economic contribution and jobs supported).

Types of economic contribution

- **Direct estimates**: The GVA contribution, COE and jobs supported directly within the industry or organisation that is the subject of an economic impact analysis.
- **Indirect estimates**: The GVA contribution, COE and jobs supported within the directly impacted industry or organisation's supply chain. It occurs when the directly impacted industry or organisation purchases supplies and other intermediate inputs.
- **Induced estimates**: The GVA contribution, COE and jobs supported when workers employed due to direct and indirect effects re-spend their income within a local, provincial or the Northern Irish economy through consumer purchases. This is reported separately to direct and indirect impacts, to be consistent with government guidance that induced (household-spending) impacts should be excluded from the central GVA analysis.

Step 1: Model inputs

To feed into the model, Nordicity estimated consumer spend in a selection of night-time industries that correspond to the 'cultural and leisure activities', and 'activities which support night-time cultural and leisure activities' categories defined by ONS (first two columns of Table 2.1).

Consumer spend was conceptually broken down into two categories: spending by Northern Ireland residents and visitor spending (domestic and international), to estimate the total economic contribution of the night-time economy. Note that there is no risk of double counting between resident and visitor spend.

Step 1A: Northern Ireland resident spending

Total spend by those living permanently in Northern Ireland was derived from the Consumer Council's Quarterly Household Expenditure Tracker, which provides weekly household expenditure figures, across income quartiles. The research also breaks this spend down into various categories, which were mapped onto the night-time economy sectors in Table 2.2.

Table 2.2: Mapping of 2-digit SIC 2007 codes to Consumer Council Household Expenditure spending on basics categories

Model Industry (SIC 2007)	Household Expenditure Tracker spend categories
Land transport	Transport

[15] Employment is measured in terms of Full-Time Equivalents (FTEs) rather than the more intuitive headcount metric as measured in the Labour Force Survey (LFS). FTEs express the quantity of labour applied to produce goods and services.
[16] Gross value added (GVA) is a standard metric used to measure economic value – that is, the contribution a company or sector makes to the economy. It measures the value of goods and services produced minus the costs of inputs and materials.

Model Industry (SIC 2007)	Household Expenditure Tracker spend categories
Accommodation	Hotels, Cafes and Restaurants
Food and beverage serving activities	Food and non-alcoholic beverages
	Alcoholic Beverages, Tobacco and Narcotics
	Hotels, Cafes and Restaurants
Sports services and amusement and recreation activities	Recreation and Culture

Source: ONS, Consumer Council
Note: The share of spend in the 'Hotels, Cafes and Restaurants' category was broken down into the relevant SIC categories using Share of businesses.

This average weekly household expenditure on night-time economy sectors across the four quarterly reports was then grossed up to estimate total annual household expenditure in Northern Ireland in 2024.[17]

Average footfall data was used to estimate the share of spend in these sectors that occurred between the hours of 6pm – 6am, in other words the spend in the night-time economy, rather than the total spend in industries active in the night-time economy. Average footfall across 2024 was calculated for the hours these industries operate between and applied to the annual spend figures.

In lieu of any geographic granularity in the Consumer Council reports, estimates for the NI resident spend in Belfast, Derry and Strabane and Fermanagh and Omagh district councils were based on share of total employment across the relevant SIC industries in the 2021 census.

The total spend of Northern Ireland residents in the night-time economy in 2024 is presented in the table below.

Table 2.3: Estimated consumer spend by Northern Ireland permanent residents in the night-time economy, 2024

	Night-time consumer spend (£m)			
	Northern Ireland	Belfast	Derry and Strabane	Fermanagh and Omagh
Land Transport	681	108	50	38
Accommodation	130	26	9	9
Food and Beverage Serving Activities	1,847	432	135	89

[17] As the transport category included all expenditure on transport, including the costs of owning and running road vehicles, the share of expenditure on domestic transport for domestic same day visitors was used instead, to better reflect expenditure on public transport services like trains, buses and taxis. As the report rolled up spend on hotels, cafes and restaurants together, and this category was relevant to both the accommodation and food and beverage serving activities industries, an adjustment was made to allocate this spend across the two industries. This allocation was based on 2024 IDBR business counts in the relevant SIC codes.

	Night-time consumer spend (£m)			
Sports services and amusement and recreation activities	240	42	16	11
Total	**2,898**	**608**	**211**	**146**

Source: Tourism NI, Belfast City Council, Derry City and Strabane District Council, ONS, NISRA, Consumer Council
Figures may not sum due to rounding

Step 1B: Visitor spending

Beyond the spend of those living permanently in Northern Ireland, domestic and international visitors are also significant contributors to the night-time economy.

NISRA collect data on the expenditure in Northern Ireland of both visitor groups during their visits, as well as shares of this spend in various categories, available at Local Government District (LGD) level. These spend categories were again mapped to the SIC industries in the model, shown in the table below.

Table 2.4: Mapping of 2-digit SIC 2007 codes to NISRA visitor spend categories

Model Industry (SIC 2007)	NISRA spend categories
Land transport	Travel
Accommodation	Accommodation
Food and beverage serving activities	Food and Drink
Sports services and amusement and recreation activities	Entertainment

Source: NISRA

Total spend in night-time economy industries for domestic and international visitors, both overnight and same day, were totalled and then adjusted by footfall in the same way as with residential spending to estimate the total night-time economy spend by visitors in 2024.

NISRA also collect the same data and breakdowns at LGD level. The total spent by visitors to Northern Ireland in the night-time economy in 2024 is presented in the table below.

Table 2.5: Estimated consumer spend by domestic and international visitors to Northern Ireland in the night-time economy, 2024

	Night-time consumer spend (£m)			
	Northern Ireland	**Belfast**	**Derry and Strabane**	**Fermanagh and Omagh**
Land Transport	48	12	4	3
Accommodation	205	69	13	12
Food and Beverage Serving Activities	204	60	13	11

Sports services and amusement and recreation activities	29	12	2	2
Total	**486**	**153**	**32**	**29**

Source: Tourism NI, Belfast City Council, Derry City and Strabane District Council, ONS, NISRA
Figures may not sum due to rounding

Step 1C: Total spend

Consumer spending in Northern Ireland across the night-time economy in 2024 therefore totalled an estimated £3.4 billion, with £761 million in Belfast, £243 million in Derry and Strabane and £175 million in Fermanagh and Omagh (table 2.6).

Table 2.6: Estimated consumer spend in Northern Ireland in the night-time economy, 2024

	Night-time consumer spend (£m)			
	Northern Ireland	**Belfast**	**Derry and Strabane**	**Fermanagh and Omagh**
Land Transport	729	120	54	41
Accommodation	335	95	22	22
Food and Beverage Serving Activities	2,051	492	148	100
Sports services and amusement and recreation activities	270	54	19	12
Total	**3,385**	**761**	**243**	**175**

Source: Tourism NI, Belfast City Council, Derry City and Strabane District Council, ONS, NISRA, Consumer Council
Figures may not sum due to rounding

Step 2: Modelling employment and GVA

The following section provides a summary description of how the input data collected in Stage 1 is converted to estimates of direct, indirect and induced employment and GVA for Northern Ireland, Belfast, Derry and Strabane, Fermanagh and Omagh.

The visitor and residents' consumer spending was allocated to one of four tourism industries - SIC 49 – Land transport; SIC 55 – Accommodation; SIC 56 – Food and beverage serving activities; SIC 93 – Sports services and amusement and recreation activities. The NISRA 2019 I-O table was then used to further allocate the total consumer spending in each SIC to one of three groupings: (i) compensation of employees, (ii) gross operating surplus and taxes less subsidies on production, (iii) and intermediate input purchases.

Step 2A: Direct contribution

The resulting estimates of compensation of employment were used to estimate direct COE. The COE was divided by the weighted average annual salary (excluding overtime) across the four tourism industries to estimate the number of direct FTEs. Gross operating surplus and taxes less subsidies on production were added to direct COE to estimate direct GVA.

Step 2B: Indirect contribution

The intermediate input purchases were mapped to each of the 62 I-O table industries. The Leontief matrix was used to estimate how these purchases of inputs generate higher output in each of the 62 I-O industries. The COE and GVA ratios for each of the 62 I-O industries are derived from the 2019 I-O table and multiplied by the estimated increase in output in each of the I-O industries. The results were summed across the 62 industries to arrive at the estimates of indirect COE and GVA. The COE estimate for each of the 62 I-O industries was divided by the FTE cost in each industry (average full-time salary x 115%) to estimate the indirect FTEs of employment supported in each industry. The FTE estimates for each industry were summed across all 62 I-O industries to arrive at an estimate of indirect employment.

Step 2C: Induced contribution

The average ratio of Type II and Type I output multipliers in the Northern Ireland economy, published by NISRA, was applied to the sum of direct and indirect output to estimate induced output. The estimate of induced output was multiplied by the overall COE and GVA ratios for Northern Ireland to estimate induced COE and GVA. Induced employment was estimated by dividing induced COE by the average FTE cost across the Northern Ireland economy (£36,304).

Step 2D: Total contribution

The total contribution equals the sum of the direct, indirect (supply chain) and induced (household) contributions. This provides the upper bound estimate. A lower bound estimate is provided by including only direct and indirect contributions.

Step 2E: Regional/local contribution

Estimates of indirect and induced contributions in terms of employment, COE and GVA for selected LGDs in Northern Ireland were based on:

- The application of location quotients (LQs) published by NISRA. The LQs were used to derive regional-supply ratios (λ) for a given geographic jurisdiction.[18]
- The derivation of Flegg's Location Quotients (FLQs) from the supply and use tables published by NISRA for each LGD used to estimate the upstream supply chain impacts retained within each LGD.

Once the LQ-based supply ratios and FLQ-based results were integrated into the economic impact model, the modelling followed steps 2b to 2d to calculate the indirect, induced and total economic contribution within each LGD.

Step 3: GVA outputs: economic contribution and jobs supported

The following tables present the results from the economic contribution modelling process.

The consumer spend contribution of £3.4 billion supported just under 114,000 FTEs of employment and almost £3.7 billion in GVA in 2024. This includes direct, indirect (supply chain), and induced (household)

---

[18] Where $\lambda > 1$, the regional supply ratio was set equal to 1. These regional-supply ratios were used to adjust the intermediate input purchases for each of industry to approximate the portion of input purchases met by suppliers located within the LGD.

impacts. Over 101,000 FTEs and £2.8 billion in GVA were estimated from within the industries servicing the night-time economy and supply chain across Northern Ireland. [19]

Table 2.7: Economic contribution of the night-time economy in Northern Ireland, 2024

	Direct	Indirect	Induced	Total
Output (£m)	3,023	1,173	1,595	**5,792**
Employment (FTEs)	92,210	8,880	12,740	**113,830**
COE (£m)	1,713	336	462	**2,511**
GVA (£m)	2,230	585	845	**3,661**

The night-time economy in Belfast supported almost 26,000 FTEs and £784 million in GVA in 2024 (Table 2.8). This includes 23,000 FTEs and £611 million in GVA within the industries servicing the night-time economy and supply chain across Belfast. While this is less than a quarter of the overall night-time economy for Northern Ireland, it reflects the geographic distribution of both employment and businesses operating in night-time economy industries across Northern Ireland. [20]

Table 2.8: Economic contribution of the night-time economy in Belfast, 2024

	Direct	Indirect	Induced	Total
Output (£m)	692	170	327	**1,189**
Employment (FTEs)	21,980	1,260	2,610	**25,850**
COE (£m)	396	48	95	**539**
GVA (£m)	516	95	173	**784**

The night-time economy in Derry and Strabane supported just under 8,000 FTEs and £249 million in GVA in 2024. This includes over 7000 FTEs and £193 million in GVA within the industries servicing the night-time economy and supply chain.

Table 2.9: Economic contribution of the night-time economy in Derry and Strabane, 2024

	Direct	Indirect	Induced	Total
Output (£m)	217	65	107	**389**
Employment (FTEs)	6,590	490	860	**7,940**
COE (£m)	122	19	31	**172**
GVA (£m)	160	33	57	**249**

[19] Analysis considers the full scale of the night-time economy, as per the standard ONS definition of night-time industry SIC codes, including industries beyond those associated with and late-night hospitality such as health and social care and retail.

[20] Sense checks and comparison across night-time economy industries in Northern Ireland LGDs show that employment and business counts are largely evenly distributed across and in line with the population, with the share of total night-time economy GVA impact in Belfast slightly higher than the LGDs share of total population (22% vs 18%). The focus of this analysis omits significant population centres in the country which are likely to have substantial night-time economy activity.

The night-time economy in Fermanagh and Omagh supported over 5,600 FTEs and £176 million in GVA in 2024 (table 2.10). This includes 5000 FTEs and £135 million in GVA directly within the industries servicing the night-time economy and supply chain across Fermanagh and Omagh.

Table 2.10: Economic contribution of the night-time economy in Fermanagh and Omagh, 2024

	Direct	Indirect	Induced	Total
Output (£m)	156	43	75	**274**
Employment (FTEs)	4,720	320	600	**5,640**
COE (£m)	89	12	22	**122**
GVA (£m)	115	20	40	**176**

3 Stakeholder interviews

Summary of findings

The following key themes were identified as part of this qualitative research:

Transport and infrastructure: Transport was identified as the most important challenge to the night-time economy. Stakeholders discussed the lack of consistent and reliable late-night public transportation and the challenges around taxi services. Extension of late-night public transport was seen as a potential catalyst for boosting the night-time economy.

Licensing laws: The licensing laws in Northern Ireland make it challenging for certain venues to operate within the current climate according to stakeholders, due to the surrender principle. Stakeholders discussed the extent to which this was a barrier, often limiting new venues to open. In addition, whilst stakeholders debated the extent to which there is consumer demand for later opening hours, there is consensus that later licensing laws would have a positive impact on the output from the night-time economy.

Cultural and alternative provisions: Stakeholders perceive the night-time economy as being focussed on food and drink venues. Stakeholders would like to see a greater focus on activities and venues with low or no alcohol offerings, which would broaden its appeal to a wider demographic. They also wanted to see events, such as the Fleadh Cheoil na hÉireann, utilised as an opportunity to boost the night-time economy.

Safety perceptions: Stakeholders identified safety as a key challenge, arguing that negative daytime perceptions directly harm the night-time economy. They recommended improving the physical environment through better lighting and animating public spaces, alongside launching targeted initiatives to specifically address violence against women and girls.

Workforce and rising costs for businesses: Key challenges were identified for businesses: business opening hours and staff retention in hospitality following the COVID-19 pandemic, and higher operating costs compared to the Republic of Ireland and the UK.

Utilising tourism: Stakeholders called for a 'one stop shop' where visitors and citizens of Northern Ireland can access information regarding events throughout the year. Stakeholders emphasised that solutions must build on learnings from elsewhere but tailored to the unique context of Northern Ireland.

Understand what customers want: Discussions among stakeholders consistently highlight the pivotal role consumers play as key drivers of the night-time economy. Stakeholders acknowledge that the ability to pragmatically adjust to these changes is crucial for sustained success within this sector.

3.1 Introduction

Ipsos completed a total of 20 depth interviews with 24 stakeholders for this research.[21] These stakeholders ranged from venues, organisations, public bodies and government departments to provide a robust and detailed analysis of the night-time economy in Northern Ireland. To note, these are the views of interviewees and therefore, perceptions have not been factually verified nor necessarily represent of the views of the broader population. The fieldwork period for these interviews ran from w/c 28th April to w/c 9th June 2025 (before the announcement of the late-night public transport pilot for Belfast in October 2025). A list of stakeholders that took part in this research are listed below:

Table 3.1: Stakeholders who took part in this research

Stakeholder list

Belfast City Council	Visit Derry	Linen Quarter Business Improvement District	Arts Council NI
Hospitality Ulster	Derry-Londonderry Chamber of Commerce	SOS Bus	Music Venue Trust
Visit Belfast	Derry City and Strabane District Council	Department for Infrastructure	Black Box
Tourism NI	Translink Rail	Fermanagh & Omagh District Council	Voodoo
City Centre Initiative Derry	Translink Bus	Free the Night	Oh Yeah Music Centre
Waterfront ICC	Belfast One Business Improvement District	Cathedral Quarter Business Improvement District	Grand Opera House

During these interviews, several key topic areas were discussed surrounding the night-time economy and guided the conversations that were had with these stakeholders. The topics included:

- Initial views of the night-time economy;
- Barriers that were impacting growth of the night-time economy;
- Potential growth opportunities for the night-time economy; and
- Any additional factors that influence the night-time economy.

[21] The sampling approach employed involved snowball sampling from a contact list provided by the client group. This list was further stratified into key sectors to ensure diverse representation and address specific research objectives. The Independent Review from the University of Stirling also provided a large resource containing qualitative stakeholder and community interviews.

Note that what is reported below represents the views of the stakeholders interviewed. These views may not accurately represent the regulatory details of the licensing system. In addition, as the sampling list was agreed with DfE, certain externalities of the night-time economy (such as harms of alcohol intoxications, violence and impacts on policing) were not the main focus of these interviews. For an objective review of the licensing system, see the Independent Review of the Liquor Licensing System by the University of Stirling [22].

3.2 Initial views of the night-time economy

There are multiple factors that stakeholders identified as being key drivers for the night-time economy, ranging from cultural, economic, and social issues that together significantly impact overall prosperity.

3.3 Key drivers of the night-time economy

At the core of Northern Ireland's night-time economy is the hospitality sector, which includes an array of establishments such as pubs, bars, restaurants, and diverse entertainment venues. This array of establishments, coupled with later licensing laws allowing certain venues to remain open until 2 am and 3 am on special nights, provides a boost to the night-time economy.

Stakeholders feel that the arts sector complements hospitality. Some expressed the belief that legal requirements mandating live entertainment or substantial food offerings for late-night licences have spurred investments in the arts. These investments cover live music performances, poetry readings, and other cultural exhibitions, making nightlife an immersive cultural experience. Industry surveys indicate that private investments in cultural activities at nightlife venues surpass government arts funding, underscoring the sector's dedication to cultural vibrancy. These activities enhance the night-time environment, attracting visitors seeking unique, engaging experiences.

> ***[To sell alcohol after 11pm] you must either provide substantial food or live entertainment. There's a legal requirement... so most [venues] will have some form of live entertainment, [and there's a] very diverse range [of arts and culture]. It could be a live band right through [to] poetry.***

The peace in Northern Ireland following the Good Friday Agreement and the end of 'The Troubles' has created a stable, attractive environment where night-time activities can flourish, contrasting with previous periods where conflict hampered economic development, which has led to an increase in tourism and night-time activities.

3.4 Demographic characteristics of the night-time economy

The night-time economy in Northern Ireland features a diverse age range, spanning from university students aged 18 and older to individuals in their 50s, 60s, and beyond. Despite this range, stakeholders feel there is a noticeable absence of the younger demographic typically associated with nightclubs, as many young people are reportedly more health-conscious and interested in cultural events.

The lack of late-night public transport was seen to significantly restrict accessibility and participation, influencing the ability of individuals to engage with night-time economic activities. This was evident especially in feedback from stakeholders located in Belfast, who identified these patrons as 'early in, early

---

[22] Independent Review of the Liquor Licensing System in Northern Ireland including the Surrender Principle, University of Stirling, 2024

out' individuals who would experience the day-time economy more often due to the increased frequency of transport.

3.5 Night-time economy barriers and opportunities identified by stakeholders

Stakeholders identified several barriers that impact the growth of the night-time economy within Northern Ireland, and there is consensus that there is no 'silver bullet' that will resolve the issues faced. Factors which impact the night-time economy include:

- Issues with late-night transportation and infrastructure;
- Perceptions of safety;
- Perceptions of licensing (including late-night licences and the surrender principle);
- Workforce and skills for those that work in the night-time economy;and;
- Alternative provisions and cultural offerings outside of hospitality and alcohol.

Areas for growth included the following:

- Improving late-night public transport;
- Easier access to late-night and liquor licensing and what this means for venues;
- Developing the skills of workers in the night-time economy and retaining these staff;
- Improving perceptions of safety within the public realm; and
- Utilising Northern Ireland's distinctive identity to attract tourism.

Stakeholders from Belfast, Derry-Londonderry and Enniskillen stress that actions required to further improve the night-time economy are not the responsibility of a single government department, public body or venue. To ensure the night-time economy within Northern Ireland gets the best opportunities to grow, a joined-up approach across government departments, venues and public bodies is crucial.

3.5.1 Transport and infrastructure

Barriers and challenges

Late-night transport was identified as a key barrier impacting the night-time economy. The primary issues include limited public transport options, lack of availability and high cost of private transport such as taxis.

Public transportation infrastructure falls short of meeting the demands of the night-time economy across Belfast, Derry-Londonderry and Enniskillen. Both patrons and workers face challenges accessing safe, reliable, and convenient transportation, leading to reduced participation in late-night events. Those within Derry-Londonderry also identified that the lack of late-night public transport links between Belfast and Derry City deters people from making the journey to Belfast.

It would be more beneficial if there were later trains, I feel that it would entice me to travel to the city for the day, or for an evening out. I think the last train leaving from Derry[-Londonderry] is Twenty to 10, which is quite early. This means people travel down earlier in the day, and have to leave mid evening because it could be their only form of transport back home.

Late-night...transport...would...massively improve the experience for everyone.

The biggest issue for venues like ours is late-night public transport.

Whilst some noted that there have been investments in public transport, such as the Glider Bus system in Belfast, and the running of the late-night bus services around the Christmas period, there was acceptance that more needed to be done. Although the late-night bus service during the Christmas period was viewed as beneficial, stakeholders felt that the service never reached its full potential, as there was not enough promotion of this service before the operating period had come to an end.

The biggest issue about that [Late-night Christmas Bus] service is it's been very unreliable. We have a Christmas service and you can't really use the figures from that Christmas service, because it takes a while for people to understand the service is there and with the Christmas service, people are only being made aware of it and then it's gone again.

A significant barrier is the shortage and high cost of taxis; a problem stakeholders believe has been worsened by post-pandemic labour shifts. Many former drivers have reportedly moved to jobs with more stable incomes and flexible hours. Moreover, taxi fares have dramatically increased, placing an excessive financial burden on patrons. It was felt the high costs deter many potential customers from engaging in night-time activities.

There are issues in recruitment, similar issues that we are having in terms of recruiting staff, [a] much smaller labour pool and probably a more competitive labour market... So there's a real challenge in the taxi industry to get those people recruited.

The transport piece is a massive one for us at the minute in that there's the cost-of-living crisis. There's not as many taxis that we would have had before, but we also have people not able to get out of the city centre.

Transportation challenges put pressure on night-time venues, which depend on consistent audience attendance and extended visitor engagement to maintain financial stability. Premature departures from events and venues such as theatres, clubs, and community art centres can cause revenue losses, complicating efforts to sustain venues' operations.

> ***What we do notice on some evening performances, our customers may be leaving 5 or 10 minutes before the end of the show to get a train.***

> ***But then when you do look at some cities that are known for an improved night-time economy like Edinburgh, Manchester, Birmingham, they have tram lines and that kind of infrastructure, which I think definitely helps.***

> ***While we [the venue] want more late-night licences, we've actually reduced them because there isn't late-night transport for our patrons and staff.***

Stakeholders generally agree that Belfast, Derry-Londonderry, and Enniskillen are compact cities with venues and events within easy walking distance. However, they raise concerns about evening transportation, particularly for those participating in the night-time economy who may have consumed alcohol. The combination of inadequate late-night public transport and a limited number of taxis restricts movement within these areas.

> ***To know that you have transport at a certain time, you have that security that you can plan your night out and be able to get home in a safe way. So I think that is a key thing, to have late-night and consistent [transport].***

> ***In terms of the media, you'd hear a lot around difficulty maybe getting a taxi home late at night. So again, it's about that sort of reliability of service and knowing that you can come out of a bar or a venue, and that you have an alternative to the private car if you're somebody that wants to go out and have a drink.***

Stakeholders felt the lack of late-night public transport has a more significant negative impact on Northern Ireland's night-time economy compared to other UK and Irish regions. While acknowledging Belfast is smaller than cities like Dublin or London, they pointed to the later-running services in those cities, such as Dublin's LUAS and London's extensive night transport, as models Northern Ireland should emulate.

> ***You can come into London, and you know tube's going to run or a bus is going to run to 2 - 3 O'clock in the morning, you're going to get from A to B. Whereas in Omagh and Enniskillen, you really do have to have that plan for how you're going to get home before you go out.***

> ***The lack of connectivity [of transport links]. I feel like I say this in every question, but if you cannot get from Coleraine, which is 30 miles down the road to Derry for a meal out and know that you can't get away home on public transport, even at 9 or 10 o' clock in the evening, that's no good.***

Transport also emerged as a pivotal factor impacting staff retention within the hospitality sector. The availability of sustainable and reliable transport solutions is crucial for supporting the workforce, particularly those engaged in the night-time economy. Ensuring accessibility could alleviate some of the barriers faced by employees commuting to and from work during unconventional hours and is vital for the seamless functioning of the night-time economy.

> ***It comes back yet again to the transport. Because even if I do have staff here going, 'I don't mind working until three or four in the morning,' if they don't drive, how are they going to get home?***

Growth opportunities

Stakeholders identified the extension of late-night public transport as a key growth opportunity for the night-time economy, signalling strong support for such an initiative.

> ***Late-night transportation, not just in the city, but intercity as well.... The last one [train from Belfast to Derry-Londonderry] is ten past nine. I mean, that's just outrageous. And that's the same with the big towns as well. There's no late-night transport in the city. But they need to look at it Intercity and from the hinterland into Belfast as well.***

> ***So our bus and transport network ends at half 10, 11 [PM]. So a lot of people then try to rush to get the last bus home. They wouldn't stay on to one o' clock [in the morning] because that's the way to get home.***

There was strong advocacy for the extension of bus and train services into the early morning hours. Some suggested implementing a two-year pilot to gauge the effectiveness and viability of late-night public transport, which could stimulate further growth and development within the night-time economy. Extending service hours would provide reliable and safe means of travel and support businesses by enabling both customers and staff to travel more easily.

> ***A double decker bus [can] hold 76 people. A small train holds 200 people. An extended six carriage train holds close to 400 people. That's a lot of taxis that need to be on the road in order to fulfil that.***

> ***And it's really just a challenge of finding a bit of funding to help get [the] service up and running that'll be sustainable and that's the challenge.***

When stakeholders were asked about a hypothetical scenario that explored the idea of public transport running until 1:30am, views on this were overwhelmingly positive and would be seen as 'transformational' to areas of the night-time economy. Although stakeholders across Belfast, Derry-Londonderry and Enniskillen accepted this was not the 'silver bullet' which will address the barriers to the night-time economy, there were strong views that late-night public transport could act as a catalyst to allow different sectors of the economy to operate at later times within Northern Ireland.

> ***I think it [late-night transport] would be transformational from the point of view of people feeling safe to go out. I think it would make more people just take the step to go out in the first place.***

> ***I think it [late-night transport] would be fantastic. I think that would bring more people in knowing that they that they don't have that anxiety of, 'are we going to be standing out in the cold, waiting for someone to pick us up because there's no taxis?'***

To combat the taxi shortage, stakeholders suggested incentivising drivers with fare adjustments, such as surge pricing for late hours. They also proposed increasing the number of licensed taxis by making it easier and more accessible for new drivers to enter the industry, while simultaneously cracking down on unlicensed operators.

The second biggest thing [issue] is the cost of transport. And I think people are thinking here really about unlicensed taxis... I think it's those sort of unlicensed taxis that are charging exorbitant rates. So the cost is a big factor for people, and this is an issue, ever since COVID, a lot of people in taxi companies left that profession and went to get other types of jobs and didn't come back.

And then there's the issue around getting a licence. It is very difficult. You have to go through a driving test again to become a taxi driver. Yeah, there's a lot of red tape.

3.5.2 Licensing laws

Barriers and challenges

The licensing laws in Northern Ireland make it challenging for certain venues to acquire an alcohol licence within the current climate according to stakeholders. Although venues may be able to apply for occasional licensing, stakeholders identified that the conditions of this license can constrain the day-to-day operations of venues. Separately, the surrender principle is a key component of the licensing framework impacting Northern Ireland's night-time economy. It is important to note that the surrender principle affects market entry, not current operations. This principle requires that a liquor licence must be surrendered before a new liquor licence is granted, creating a limited supply of liquor licences and effectively inflating their cost. The principle was viewed by some smaller venues as restricting the ability of smaller, independent venues to emerge.[23]

It's becoming increasingly difficult for us to apply for those occasional licences. It's a lot of resource, it costs a lot, and it means physically going to court and standing swearing in front of a judge.

I mean, in terms of relaxing of licensing laws... we should be similar to other cities destinations, and I don't think we'll ever be in a situation where there'll be loads of nightclubs all offering that service to be open to 3 or 4 in the morning.

You can't get it [a liquor licence]. You know, if you're an entrepreneur with a brilliant idea, you can't just open a pub. You have to wait until somebody surrenders a licence. So I mean, that's massively, ridiculously curtailing.

Some stakeholders felt that cities in the Republic of Ireland and in Great Britain had later opening hours in comparison to Northern Ireland, which may drive potential patrons to other locations. An additional concern identified by stakeholders (although not covered under licencing legislation) involves the lower cost of VAT in the Republic of Ireland. This means business and venue opportunities are more attractive than those within Northern Ireland. As such, it was suggested that this could influence whether some travel across the border for later evenings, and for a lower cost (although other influencing costs were not mentioned).

---

[23] A separate issue to note is that there is no nightclub-specific licence category in Northern Ireland. This is not a consequence of the surrender principle.

> ***Their [venues] VAT is quite high compared to other cities on the island of Ireland. So we obviously have Northern Ireland. [The] Republic of Ireland is quite close by and that would be at 9%, or 13% and going down to 9, whereas we're starting with 20. So we're at a disadvantage there.***

> ***I think if you're too restrictive… there's a likelihood people will go to other venues. [They] may be likely to go into the south of Ireland.***

Some stakeholders felt making late-night licensing easier to apply for could have an impact on the night-time economy. Others said there should be a focus on non-alcohol centred attractions and did not fully see licensing as a barrier, indicating that current consumer trends showed movement away from late-night premises such as bars and night clubs.

> ***[It] Depends where they are and who they're trying to attract and target at that time of day. If I was a resident nearby one of these venues that was attracting maybe a younger audience to three o' clock, I would not be happy.***

Others also highlighted late-night licensing hours and transport options need to be interlinked. Venues and organisations both identified that if licensing hours were to increase further without the adequate infrastructure from late-night public transport, this would not solve current problems as this would only push the current issues surrounding the lack of transportation later into the night and early hours of the morning.

> ***I think the infrastructure to support people at their most vulnerable on a Saturday night when there's already an overloaded NHS and there's no [late-night] transport, and people are already on the streets for various reasons, I think it [infrastructure] could kind of implode and be really problematic for society.***

> ***I suppose in terms of [closing] time for me, it's the transport getting home and the taxis and that… seems to be [the issue], that's it beyond our theatre.***

Growth opportunities

There are mixed views on how easing the liquor licensing process would affect the night-time economy in Northern Ireland. As highlighted previously, some stakeholders believe the current licensing framework and 'surrender principle' are restrictive for smaller new entrant venues and need to be reviewed to allow for additional venues to open.

> ***There's changes needed in our licensing system. I'm probably not over it as much as I probably should be, but the licensing system in Northern Ireland does need improved. It needs looked at. It needs to be fair so that other externals [venues] can come in more.***

> ***The surrender principle [is a challenge], which inflates the cost of licences, and creates a monopolistic environment dominated by a few large hospitality groups.***

Some stakeholders argued that liquor licences may not be the primary barrier, pointing to a consumer trend away from traditional alcohol-based nightlife like bars and clubs.

> ***I mean that whole element has changed just to consumer demand...Younger people now want to call it Hygge. A Scandinavian word... means small, intimate. They've moved away from the big loud, consume lots of alcohol type approach. They want more small, intimate venues and such.***

There was also an acknowledgement that any changes to licensing laws must be managed to avoid exacerbating issues like crowd control and safety. Although technically staggered closing of venues is possible under current licensing legislation, stakeholders discussed their perceptions around improving staggered closing times to reduce congestion and enhance public safety.

> ***Some of the things that's been discussed before is like late licensing, but maybe staggered licensing. So it's not every venue all finishing at the one time and then people can't get home and all that kind of stuff.***

> ***It's quite time consuming for us to apply for the late licences until... [its] more of a given that the [late-night] buses were there sometimes as well.***

3.5.3 Cultural and alternative provisions

Challenges and barriers

Stakeholders perceive Northern Ireland's night-time economy as being heavily focused on food and drink. While acknowledging the strength of the region's cultural offerings, they believe that better promotion and integration of cultural events within the broader night-time economy would be a significant growth opportunity.

> ***We have a vibrant arts, culture, events, we have a fantastic hospitality scene. We have the ingredients. But what we differ from is that these locations have what we aspire to in that it's a complete focus.***

However, concentration of pubs presents challenges around diversity of available activities, limiting options primarily to eating and drinking. Stakeholders feel that this focus could be preventing non-drinkers from engaging in the night-time economy.

> ***Young people have different habits today. They drink less.***

> ***From observation, we have noticed that the student population seems to be a lot more health conscious, and may not frequent the bar nightlife in the city as much. They may be more attracted to cultural, arts or sporting events.***

Some stakeholders identified that additional funding for arts and cultural spaces would be beneficial for the night-time economy, with parallels being drawn to the Republic of Ireland and in the UK, highlighting the disproportionate funding allocated to the art in Northern Ireland in comparison to other regions.

> ***The advantage that the south has, though, is they have a lot more investment in the Night Czars in public realm. They're really putting a lot of money. They've got a lot more investment in culture and art.***

> ***One of the [issues] that I wouldn't mind bringing up is the issue with the art spend in Northern Ireland, per head, it was tiny. It's like £4.50 or £4.30 per head in Northern Ireland. In the Republic of Ireland, it's like €25-a-head. London, it's like 20 quid-a-head. I think Manchester... it's become even higher than London because they had some more funding. It's like £50-a-head or something.***

Growth opportunities

Stakeholders identified showcasing Northern Ireland's unique offerings as a key opportunity for economic growth. Stakeholders referenced the Fleadh Cheoil na hÉireann which launches in August 2026, Belfast Stories in 2030 and the revival of Culture Night in Belfast in September 2025, all of which were highlighted as an opportunity to promote the economy in Northern Ireland and have the potential to draw a large number of visitors and NI citizens to the night-time economy.

> ***I think Belfast City Council is looking ...into how we can attract more people and families into living in the city centre ...So I think Belfast is a bit behind on that but is trying to tackle that.***
>
> ***It's [Fleadh Cheoil na hÉireann] one week in each of those years but it's an all-Ireland thing, but people come from literally all over the world to these Fleadh's and that's going to be a big test for us, because conservative estimate that it's going to bring in 700,000 in that week, in one week in each of the two years.***

Stakeholders reiterated the need for a varied stream of events throughout the year to cater to a broad array of interests and demographics. This would prevent lull periods between larger events, ensuring a consistent inflow of visitors and activity. Furthermore, stakeholders suggested that more unique gatherings - such as themed festivals, cultural arts showcases, or unconventional pop-ups - could capture specific market segments and engage diverse audiences.

We do have a cultural vibrancy. We're known for UNESCO status. [It] Kind of gives us international recognition of that when we sit on that international UNESCO network, with 140 other countries that are looking to us for best practice in terms of our model of supporting the sector and then of how that delivers into subsequent experiences in the evening.

The thing that Derry [Londonderry] does really well, and I think better than Belfast or Enniskillen, is its festivals. So like the jazz festival, like Derry [Londonderry] Halloween, they are so good and they're so impressive to the locals and to visitors. But there are big gaps in the calendar... So you've got sort of like those five, six months of the year...where night-time economy businesses struggle because it's dark [and] the weather's bad.

You know, you don't get a UNESCO City of Music status without there being something behind that. So they love the Irish story. They love the Irish culture, the music, the people.... And Belfast has got plenty of that.

To ensure events are successful, stakeholders discussed the need for strategic, sustained marketing and promotional efforts to heighten their profile. Stakeholders suggested that partnerships between public and private sectors, utilising digital platforms for broader outreach, and leveraging social media for engagement could be utilised to increase the visibility and attractiveness of events.

3.5.4 Safety perceptions

Barriers and challenges

A key issue identified by stakeholders is the perception of Belfast City Centre as unsafe, even during daytime shopping hours. They felt that by addressing this negative daytime and night-time experience and enhancing the city's overall image, there would be a beneficial knock-on effect, which would help change perceptions and draw a broader consumer base to the night-time economy.

I mean, the city centre isn't a particularly welcome space at night-time, particularly for bringing children in or young people... It's not nice really to shop in during the daytime sometimes.

Big element of it [perceptions of safety] ... is daytime experience. If you're in Belfast... if you're in shopping during the day and there's people lying around the street taking drugs ... then you're going to go back there and you think 'it's dark' and dark always makes people feel less safe.

Stakeholders felt that poorly lit, dilapidated areas with unclear signage suggest neglect, which increases perceived risk and discourages people from engaging with the night-time economy.

I think there's always going to be a sense that that [feeling unsafe] can happen around these streets of different bars because people will congregate, and they might all be wearing the same sports team strip and that can make people feel uneasy.... To me it's got to be about the lighting.

Belfast is no worse than anywhere else, but it does exist in terms of people with homelessness situation. Drug dealing and drug users and drug paraphernalia, [things] left behind then in terms of needles and things.

Growth opportunities

Stakeholders identified improving the public realm's safety and perception of safety as key to bolstering the night-time economy. They advocated for fundamental enhancements, such as better street lighting and "animating" dilapidated areas, to increase visibility and reduce vulnerability. Reliable mobile phone signals were also noted as a crucial complementary safety measure.

The lighting, to me, is almost the most important thing that there is. You can see a good way it is reasonable for the most part through the city centre. But I think the City Deal money there is the city spend in the Derry[Londonderry] area will actually improve it. And that I think will be a really big benefit to us.

Maybe street animation, late-night opening. They're not innovative events. Open air events, you know, places lit up in the evenings, street cafes, all those things.

I suppose lighting is one [areas to improve]. Making sure that your spaces are well lit, that they're safe.

Investing in public spaces with a focus on aesthetic and functional enhancements is another key strategy in improving perceptions of safety. The presence of clean streets, vibrant public areas, and effective wayfinding systems all contribute to the perception of a managed and secure environment. Public art, landscaping, and the inclusion of thoughtfully designed street furniture further enhance these spaces, indicating active stewardship and care. These elements signal to visitors that these areas are monitored and maintained, thus promoting a sense of safety and encouraging more people to participate in night-time economic activities.

I think there is definitely a kind of exposure there where I think women feel more vulnerable... But it's just that meandering between the venues and late-night art tends to happen in that same kind of Royal Avenue, Cathedral Quarter area where a lot of the kind of problems are being seen.

Some stakeholders also referenced the Purple Flag accreditation[24], which is held currently by Belfast and Derry-Londonderry, with Enniskillen also previously holding this accreditation. There was recognition of the significance of achieving this and what this means for maintaining and managing the night-time economy. Stakeholders believe there is a missed opportunity to promote the Purple Flag accreditation held by

[24] Purple Flag is an international accreditation programme that aims to help create safe and thriving locations at night for all users.

Northern Ireland's cities. A stronger promotional drive is needed to explain what these awards mean for the safety and innovation of the night-time economy, thereby boosting its reputation.

> ***Enniskillen at a time had the Purple Flag…It's basically a checklist to see about how safe you are in the night. [it is] a bit like a blue flag at a beach. It's basically saying not only is the water safe, but the environment around it is safe.***
>
> ***We're [Derry-Londonderry] obviously a Purple Flag destination, so we've gone through the whole process of being recognised as a Purple Flag, a city that has good integrated communication between police, the buyer [customer], hospitals, all of that, to ensure that the [night-time] experience is a seamless one.***

> ***Some of the things that the Purple Flag looks at, you know, around vibrancy, safety, transport, animation spaces and gives you that kind of marker as to, well, 'what are those core areas', what's the improvement works that need to be done?', 'How do you benchmark against other cities?'***

Education and awareness initiatives which target societal issues related to safety, such as violence against women and girls, were also discussed. Increasing conversations and initiatives can cultivate a cultural shift towards greater respect and safety, which in turn creates a secure atmosphere within nightlife settings. Moreover, promoting awareness of bystander intervention techniques and encouraging responsible patron behaviour can empower individuals to actively contribute to the creation of safer night-time environments.

3.5.5 Additional areas raised by stakeholders

Work force and rising costs for businesses

A significant issue that arose from discussion was the acute shortage of skills and workforce in the tourism and hospitality sector. Stakeholders discussed the impact of the COVID-19 pandemic, which resulted in a loss of a substantial segment of the sector's skilled workforce. This had practical implications for businesses in this sector, preventing restaurants from operating on certain days early in the week. This highlights the broader issue of workforce stability and its impact on service delivery, especially when considering the expectations of international visitors.

> ***I suppose well that's costs, skills, and staff retention [and] shortages. [There was a] loss of a significant proportion of the tourism and hospitality skill sector over COVID that hasn't really bounced back to the levels that it was. And that obviously has huge knock-on effects to particularly a lot of our restaurants, who have had to take decisions to not open on certain days of the week.***

Furthermore, stakeholders highlighted businesses are grappling with escalating rates, surging operating costs, and heightened staff turnover. These pressures drive business owners to increase prices as a necessary measure to sustain operations and maintain profitability. However, as prices climb, customer attraction to the night-time economy decreases as the perceived value wanes against the backdrop of household budget constraints. This dynamic indicates a delicate balance within the night-time economy in Northern Ireland where businesses must navigate cost management while maintaining customer satisfaction to stay competitive.

So rising costs that all of the businesses are facing just around premises, the supply chain and just what that means, even infrastructure costs that they're facing and that's just going upwards and upwards. But you can't always pass that on to the consumer.

Utilising tourism

There was a consensus that tourism is vital to Northern Ireland's economy, but a disconnect exists in linking it effectively to the night-time economies of Belfast, Derry-Londonderry, and Enniskillen. Stakeholders stressed the need to attract visitors who extend their stay and spend more within the local economy. They warned that copying models from major cities like Amsterdam would be ineffective, emphasising that a successful strategy must be tailored to Northern Ireland's unique characteristics, including its compact size, dispersed demographics, and specific cultural nuances.

I mean, there's a line that the footballers use. 'We're not Brazil, we're Northern Ireland.' ... So, let's not try and copy 11 [cities]. Let's learn from other people, but also then create our own product... Our night-time economy is the people that live here and the people that visit here. And we've got to understand what each of them want and then give them that.

What we're selling [in] this place is culture as well. This is Ireland. It's all about music and dancing and fun. Can you see any dancing anywhere? No, not really.

There was also a call for the development of a 'one-stop-shop' platform which visitors could access to become aware of events that are on during the year, the locations they are operating and how to get to these events.

I think that more joined up sharing of information. Is there a map? Like an arts and cultural map?... People when they're the hotel reception, they get a map for the city centre, or where [the] Titanic is. They [can] also get to see where they can see comedy, where they can access music. So I think more kind of partnership working.

By utilising tourism in Northern Ireland, there is the opportunity to build on actions set out in the Tourism Vision and Action Plan set out by the Department for the Economy[25]. Increasing tourism is a key opportunity to boost prosperity and employment across Northern Ireland. A thriving tourism sector, active both day and night, can drive regional development and effectively promote the unique character of each area.

Understanding what consumers want

In examining the dynamics of the night-time economy, a recurrent theme surfaced concerning the importance of understanding the needs and perspectives of patrons. Discussions among stakeholders consistently highlighted the pivotal role consumers play as key drivers of the night-time economy. This understanding necessitates that the night-time economy remains adaptable and responsive to evolving consumer trends. Stakeholders acknowledged that the ability to pragmatically adjust to these changes is crucial for sustained success within this sector. This focus on consumer orientated strategies underscores a broader recognition of the intricate relationship between consumer preferences and the operational

---

[25] Tourism Vision & Action Plan: 10 Year Plan | Department for the Economy

adaptability required to meet these evolving demands. There was emphasis placed on the patterns of consumer engagement, preferences of the type of activities that consumers wish to partake in, and how consumer behaviours that shape and influence the trajectory of the night-time economy need to be considered.

> ***[It] has to be commercially viable and to be commercially viable it has to be, bottom line, [it] is what the consumer wants, when they want it, at a price they want it at and they can't access as an accessible to get to, because we've seen a trend away now the same number of people are going to cultural things, but they're different than what we offered before.***

3.6 Which areas would stakeholders target with funding?

Stakeholders highlighted several barriers that are inhibiting the growth and vibrancy of the night-time economy. These areas of concern not only represent challenges but also indicate opportunities for strategic investment that could catalyse economic growth and cultural enrichment.

One of the most prominent barriers identified is current public transport, particularly in relation to late-night services. The lack of efficient and reliable transport options during late hours is seen as a significant deterrent to participation in night-time activities. Stakeholders argue that extending the operational hours and increasing the frequency of buses and trains would not only facilitate greater accessibility but also enhance the safety and convenience for all city-goers.

Enhancing both perceived and actual safety is essential to creating an environment where people feel comfortable and encouraged to engage in night-time activities. Additionally, stakeholders emphasise the need to address prevalent social issues such as homelessness and anti-social behaviour, which significantly impact the atmosphere and perception of the city.

4 Illustrating some potential impacts of policies to support the night-time economy

Summary of findings

This section illustrates the potential impacts of policies to support the night-time economies of Belfast, Derry and Strabane and Fermanagh and Omagh.

Extending bus routes services later into the night could contribute an expected £900,000 to £2.4 million in additional GVA annually. When considering only direct and indirect estimates, these are between £730,000 to £1.9 million annually.

Large cultural festivals, such as Culture Night Belfast could contribute an increase in GVA between £1.3 million to £3.3 million in Belfast. When accounting for direct and indirect estimates only, this could include an estimated GVA of £1 million - £2.6 million.

Evidence on impacts of public safety measures are limited. However, based on an external case study, introducing a late-night levy to fund safety measures could potentially lead to a 9% to 19% reduction in crime at night in Belfast.

Reforming the 'surrender principle' could contribute an estimated increase in GVA of £2.4 million - £4.8 million in Belfast, £2 million - £3.9 million in Derry and Strabane, and £1.6 million - £3.2 million in Fermanagh and Omagh. When accounting for direct and indirect estimates only, reforms could contribute an estimated GVA of £1.9 million - £3.8 million in Belfast, £1.5 million - £3 million in Derry and Strabane, and £1.3 million to £2.5 million in Fermanagh and Omagh. As noted in the Stirling review, it is not possible to definitively quantify the business impact of abolishing or reforming the surrender principle, since there is no directly comparable system. The Stirling review sets out options for addressing market failures without necessarily increasing the total number of outlets. Our approach, by contrast, represents a simplified scenario which assumes an increase in pubs and revenue within the local area, because of reform. This analysis also excludes the wider social and fiscal costs of any changes to licensing rules, which fall outside the GVA assessment.

This section considers several potential policies to boost the night-time economy, focusing particularly on interventions to support Belfast, but also considering the impacts of licensing reform in the Local Government Districts of Derry and Strabane and Fermanagh and Omagh. Due to data availability constraints, these districts are used as the closest available geographic proxies for Derry-Londonderry and Enniskillen.

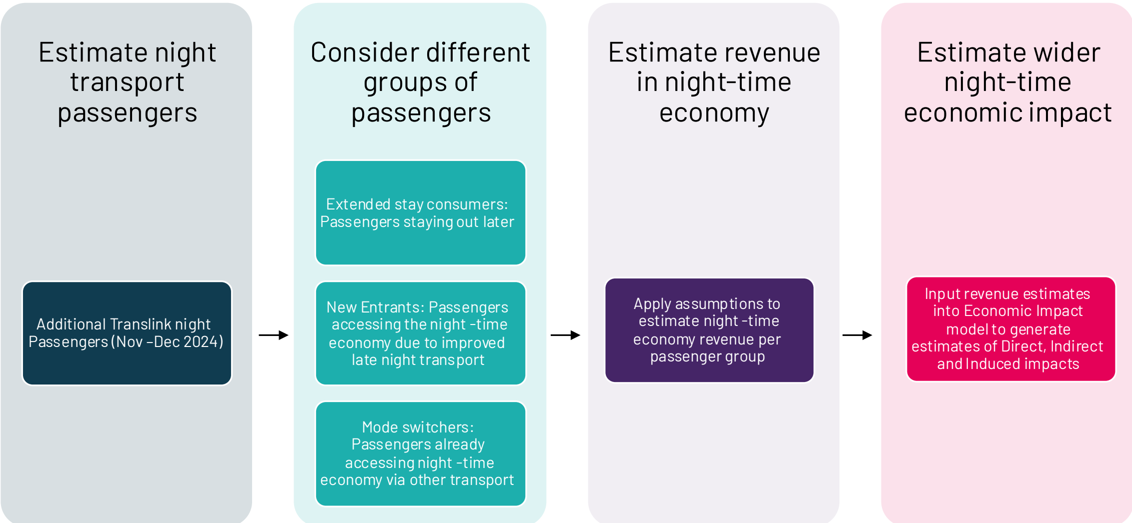
To understand the potential impacts of policies, a review of existing evidence - both within the UK and internationally - was conducted and is presented in Appendix 2. This section adopts a scenario modelling approach, drawing on insights from the evidence review, stakeholder-provided survey data on consumer perceptions, and available objective data. The resulting scenarios assess the potential broad order of GVA effects which could be anticipated. These estimates are intended to inform analytical research and support future policy development, but they do not constitute a comprehensive appraisal in line with the HM Treasury Green Book. Although adjustments are made for displacement, these scenarios are not a full welfare assessment and should not be interpreted as net economic impact without considering other factors such as substitution, and capacity constraints. The following scenarios are estimated;

- Late-night public transport,
- Cultural festivals (such as Belfast Culture Night),
- A late-night levy to support public safety,
- Reform of the 'surrender principle' licensing system.

4.1 Late-night public transport

Following the qualitative research that identified a lack of late-night transport as a barrier in the night-time economy, this analysis assesses the potential economic uplift from introducing extended weekend bus services. It should be noted that this analysis was conducted prior to the announcement of a late-night bus service pilot in October 2025. The model incorporates the new consumer spending generated by passengers using these services. The uplift in spending is then translated into direct, indirect, and induced Gross Value Added (GVA) for Belfast's night-time economy. Figure 4.1 below illustrates the steps taken to produce the potential estimate.

Figure 4.1: Step-by-step process to estimate changes to late-night transport on the Belfast night-time economy



Taking each step in turn:

Step 1: Estimate additional night-time passengers: To estimate the potential ridership on late-night transport, data from Translink's 'Nightmover' service trial was used. The 'Nightmover' service ran on weekends throughout November and December 2024. The data indicated that capacity utilisation over this period was 23% on average across services. However, recognising that the new service ridership will likely grow over time, the methodology incorporates an uplift assumption. It is anticipated that factors such as advertising campaigns, service improvements, and increased public familiarity and trust will improve the service's performance. Therefore, the modelling incorporates an assumption that capacity utilisation could reach 45% in future.[26] Based on this, the anticipated number of passengers for the late-night bus service is forecasted to be 5,000 passengers per month.

Step 2: Consider different passenger groups: Passengers were categorised by IPSOS into three key groups, each contributing differently to consumption:

- *Extended-stay consumers* – those who would have engaged in the night-time economy regardless of the extended bus timetable but stay out longer due to later public transport options;
- *New entrants* – individuals who would not have accessed the night-time economy without the availability of late-night public transport;
- *Mode shifters* – those who already participate in the night-time economy but would switch from other forms of transport (e.g. taxis or walking) to late-night public transport.

Step 3: Estimate consumer spend generated in the economy for each passenger group:

- *New entrants: (23% of passengers):* These are individuals who would not have participated in the night-time economy without the new late-night transport. Therefore, their full spending is considered additional economic impact[27]. Their spending in the night-time economy is estimated to be between a lower bound of £49[28] (covering core expenses like food, drinks, and entry fees) and an upper bound of £129[29] (including wider activities like shopping or cultural events). This provides a realistic range for sensitivity checks within the scenario analysis.
- *Mode Switchers (36% of passengers):* This group consists of people who would have engaged in the night-time economy but previously used other transport methods (like taxis or personal cars)[30]. Since they were already spending money in the night-time economy, it is conservatively assumed that they contribute no additional consumer spend.
- *Extended stay consumers (41% of passengers):* This group would have participated in the night-time economy but truncated their stay in response to constrained transport options and now stay out longer due to the availability of late-night transport. It is assumed the service extends a typical five-hour trip by an additional two hours. Based on a pro-rata calculation of the average spend, this is

---

[26] The projected 45% capacity utilisation is based on the average utilisation of the highest load route of the Translink Nightmover service during the trial period.
[27] Based on CARD group market research carried out in July 2025, 23% of respondents overall said the lack of transport availability was a 'key' barrier, discouraging their visit to Belfast. We have assumed therefore that 23% of total late-night passengers are 'additional' and would have not accessed the night-time economy without late-night transport.
[28] Based on REKOM Night index, 2023 estimates of average 'night out' spending in the UK, adjusted to 2024 prices.
[29] According to 2025 market research from the CARD Group, the average individual spends £141 during a night out in Belfast (including shopping, wellness and cultural activities). To isolate spending within the night-time economy itself, we have excluded the average transport cost of £12, resulting in an estimated spend of £129 per person.
[30] Based on the 2025 CARD Group market research, we estimate that 36% of our projected passengers will be 'Mode Switchers.' This figure is derived from the finding that while 55% of night-time economy users currently travel by taxi, car, or on foot, 66% of that specific group indicated they would switch to late-night public transport if it were an option.

estimated to generate between £20 and £52 in additional spending per person. The lower estimate reflects spending on core activities, while the upper bound includes other night-time purchases.

Step 4: Adjust to account for seasonality and displacement. All estimates are then scaled to estimate the total additional spend per year, adjusting for different spending patterns throughout the year, using ONS Retail Sales Index[31] data. In estimating the potential impact of late-night public transport on Belfast's night-time economy, we have taken into consideration the possibility of displacement effects. This refers to the likelihood that some of the increased expenditure within the city's night-time economy may be re-allocated from other nearby areas rather than being additional spending. Considering that there are few alternatives for late-night activities in the surrounding areas, most of the additional spending in Belfast is likely to constitute new economic activity rather than a redistribution. Therefore, a conservative displacement rate of 5% has been applied within Belfast. Displacement from outside the city region is not included.

By applying the above assumptions, the extension of late-night public transport is estimated to contribute between £880,000 (lower bound) and £2.3 million (upper bound) in consumption to the night-time economy in Belfast[32].

Step 5: Estimate wider night-time economy GVA contribution. Estimates of consumer spend in the night-time economy have then been inputted into Nordicity's MyEIA™ Model to understand the wider effects on direct, indirect and induced GVA.

[31] ONS: Retail Sales Index, Census 2021

[32] The upper and lower bound estimates are based on the estimated spend per consumer, where the lower bound is £49[32] (covering core expenses like food, drinks, and entry fees) and the upper bound is £129[32] (including wider activities like shopping or cultural events).

Table 4.1: Estimated GVA contribution from late-night public transport in Belfast

	Lower bound	Upper bound
Direct GVA	£630,000	£1,540,000
Indirect GVA	£100,000	£320,000
Induced GVA	£210,000	£540,000
Total GVA	**£940,000**	**£2,410,000**

Therefore, extending late-night public transport in Belfast could contribute an additional **£900,000 to £2.4 million** in total GVA annually[33].

The following caveats to this analysis should be noted:

- Estimates of anticipated passenger numbers are based on an assumption around the future utilisation rate of services. However, it should be noted that any modifications to the estimated passenger numbers could deliver significantly more benefit. The three BIDs have committed £60,000 over the next two years to help market the service, with an active network of night-time economy users who will be receptive to the promotions. This enhanced marketing effort could mean that more people use late-night transport, the frequency of visits could increase and the % of new entrants could rise delivering greater economic benefit. This scenario analysis takes into consideration a potential increase in passenger numbers. However, the medium to longer term passenger numbers are not known.

- These estimates do not account for spending on transport. For example, passengers switching from taxis to public transport may reduce overall transport-related expenditure, which has not been included.

- For the purposes of this analysis, late-night bus passengers have been categorised into three groups: 'New Entrants', 'Mode Switchers', and 'Extended Stay Consumers'. The modelling concentrates on these three groups given there is insufficient data evidencing how other consumers may respond. However, it is acknowledged that some consumers may respond differently. For example, stakeholder interviews indicate that some individuals might shift the timing of their evening activities, rather than increasing their net spending, if late-night transport improves. This represents a potential behavioural response not captured in the current analysis.

- The scenario analysis assumes that consumers will increase spending by a similar proportion in response to better transport options, given there is insufficient information available to categorise further. However, it is acknowledged that this assumption may not hold true for all individuals, particularly those with fixed budgets, such as students or people on lower incomes, whose spending capacity may be limited.

[33] When considering only direct and indirect impacts, these are between £730,000 to £1.9 million annually.

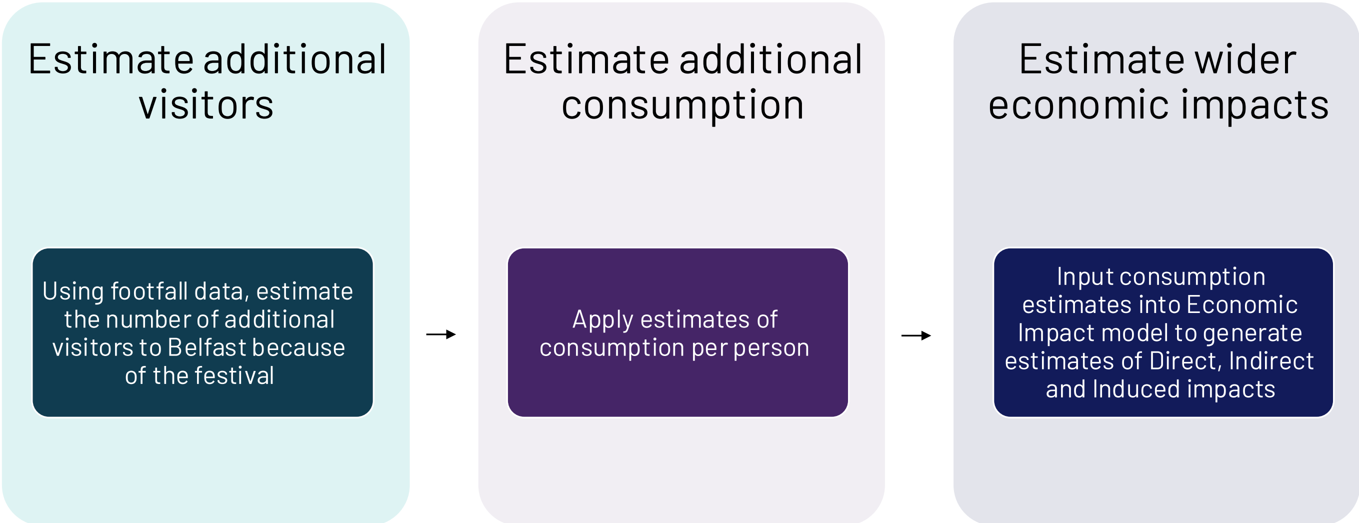
- The analysis primarily quantifies the potential additional consumer spend into Belfast's night-time economy because of the extended late-night public transport. It is important to note, however, that this is only one dimension of the overall impact. Other impacts could include:
  - Enhancements to public safety, as better late-night public transport options reduce the risk of accidents and crime associated with night-time travel[34].
  - Time savings for consumers in the night-time economy, who may have spent additional time travelling to and from the city centre[35].
  - Wider spillover effects into other regions and cities, for example, by encouraging more late-night services along extended routes.

4.2 Cultural festivals

A report by the Arts Council[36] states that government investment in arts in Northern Ireland was £5.07 per capita in 2022/23 - significantly lower than in Wales (£10.51) and the Republic of Ireland (£21.58). This may suggest there is unmet demand for the cultural offer in the region, and therefore potential for initiatives to support the region's cultural offering. Belfast Culture Night is a key example of such an event.

The festival began in 2009, with audiences growing to an attendance of over 100,000 during the two day festival in September 2019. The following scenario estimates the potential economic contribution of the festival.

Figure 4.2: Step-by-step process to estimate the potential economic contribution from Culture Night in the night-time economy



The following steps as outlined in Figure 4.2 are taken to produce this estimate:

Step 1: Estimate the number of additional visitors to Belfast: First, the number of additional visitors is estimated - those who would have only visited Belfast because of the event. The scenario assumes a total

[34] Consumer Council: Understanding consumer needs relating to night-time travel and personal safety provides more detail on issues that late-night transport may help to address.
[35] Time savings can be monetised using the DfT's Value of Time: https://www.gov.uk/government/publications/tag-data-book
[36] Government's lack of investment in the arts is... | Arts Council NI

attendance of 100,000[37], using the 2019 Culture Night as a historical benchmark. To estimate the number of additional visitors brought in by the festival, footfall data from two periods was compared. Footfall during the festival in September 2019 was 25% higher than in September 2024, the most recent comparable period without the festival and unaffected by COVID-19. By applying this 25% rate to the total attendance, it is estimated that 25,000 visitors are additional. It should be noted that this adjustment is indicative and does not represent a causal estimate. To remain conservative, it is assumed that the other 75,000 attendees, who might have been in the city anyway, do not contribute any extra spending beyond their normal habits.

Step 2: Estimate the additional consumption: In the absence of specific spending data for festival attendees, estimates from the 'late-night transport scenario' are used as a reasonable proxy for average consumer spending. Two scenarios are used to create a spending range for these 25,000 individuals. This includes a conservative lower-bound estimate of £49 per person, which covers core expenses like food, drinks, and entry fees, and a more optimistic upper-bound estimate of £129 per person, which accounts for a wider range of economic activities such as retail shopping, wellness, and cultural events.

Based on the above assumptions, a range of potential direct revenue to the Belfast night-time economy is estimated at between £1.2 million - £3.2 million in consumer spend.

Step 3: Estimate the wider night-time economic contribution. The above direct revenue was then applied to Nordicity's MyEIA™ Model, which produces the following direct, indirect and induced estimates:

Table 4.2: Estimated GVA contribution from Belfast Culture Night

	Lower bound	Upper bound
Direct GVA	£800,000	£2,090,000
Indirect GVA	£180,000	£470,000
Induced GVA	£290,000	£760,000
Total GVA	**£1,270,000**	**£3,310,000**

This scenario estimates that Culture Night Belfast could contribute between **£1.3 million and £3.3 million** in additional GVA[38].

4.3 Late-night levies to support public safety

Night-time public safety emerged as a key issue among stakeholders in the qualitative research, with many highlighting it as a barrier to the growth of the night-time economy. Both Belfast and Derry-Londonderry currently hold Purple Flag status, which recognises efforts to enhance the quality and safety of cities at night. In Belfast, the city's three BIDs (Linen Quarter BID, Belfast One, Cathedral Quarter BID) fund the Purple Flag assessment and play a crucial role in overseeing and maintaining the accreditation. Initiatives include interventions to create safe spaces on the streets of Belfast, such as Safer Neighbourhood Officers, Street Pastors and 'Ask for Angela'. Key performance indicator (KPI) data suggests these efforts may be having a

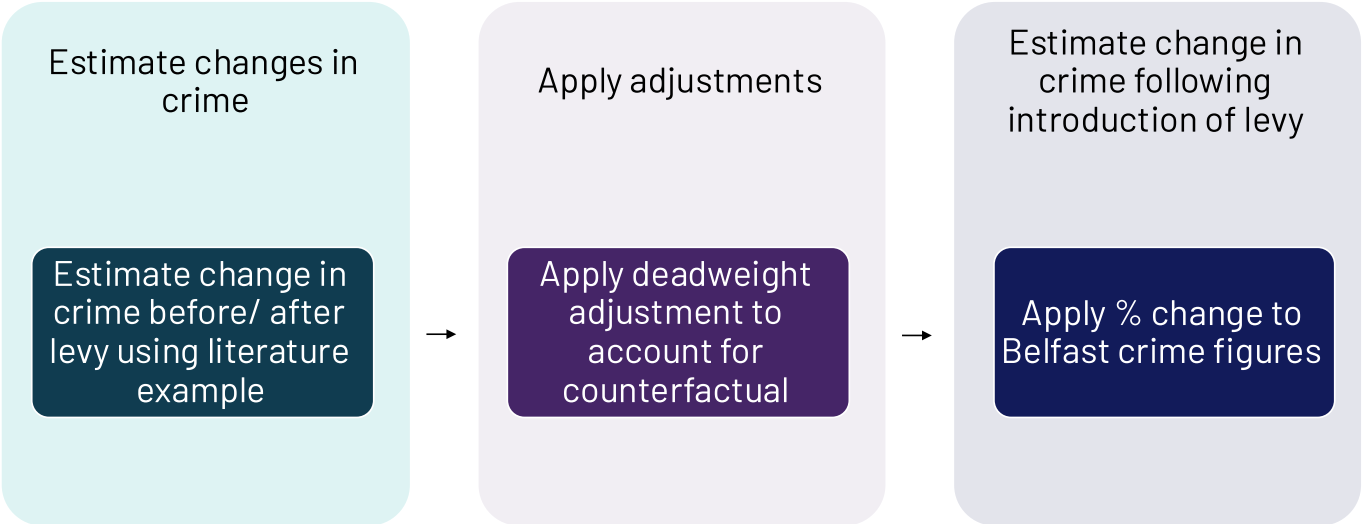
[37] Belfast City Council: City growth and regeneration committee
[38] When accounting for direct and indirect impacts only, this could contribute an estimated GVA of £1 million - £2.6million.

positive impact: the proportion of people reporting feeling 'very unsafe' at night has fallen from 12% in 2019 to 6% in 2023[39].

However, the evidence review in Annex 2 highlights that the effectiveness of similar public safety interventions in other night-time economies is mixed. Therefore, there remains insufficient evidence to confidently predict whether additional or alternative policies would support similar economic benefits in Belfast. For this reason, the scenario below does not estimate GVA impacts.

The potential night-time crime reduction in Belfast has been modelled using data from Islington, given that the scope is the closest available reference for how a late-night levy, aimed at improving public safety, can reduce late-night crime. The levy was associated with a 17% reduction in alcohol-related crime at night in the 12 months following its introduction[40]. Figure 4.3 below illustrates the steps taken.

Figure 4.3: Step-by-step process to estimate changes to crime in Belfast following late-night levy



A three-step approach was adopted for this scenario analysis:

Step 1: Estimate potential impact: The 17% reduction in alcohol-related night crime observed in Islington in the year following the introduction of the levy is used as a starting point.

Step 2: Adjust for deadweight: To account for the proportion of crime reduction that might have occurred regardless of the intervention, a deadweight adjustment of 19% is applied based on HCA Additionality Guidance[41] for crime interventions. This results in an adjusted crime reduction estimate of 14%**.**

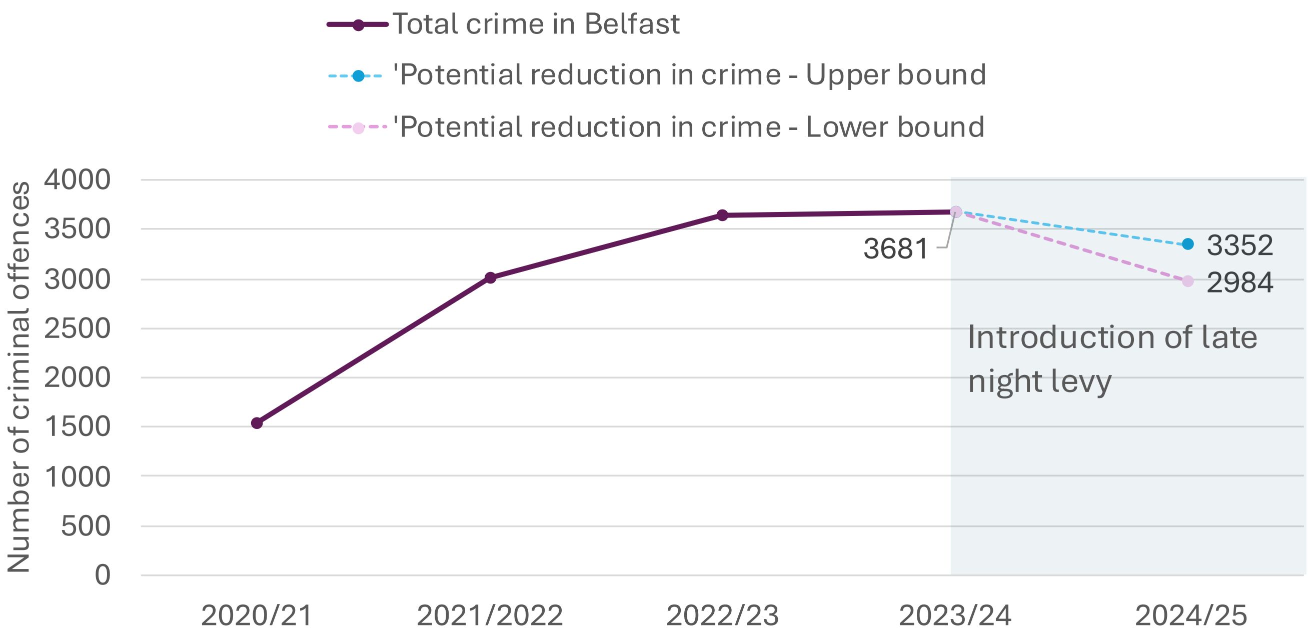
Step 3: Apply to Belfast night-time crime statistics and generate a range: Assuming similar conditions, the 14% adjusted reduction is applied to Belfast night crime statistics[42] as a central estimate. To reflect uncertainty, a **±5% range** is used, giving an estimated potential **crime reduction of between 9% and 19%** following the introduction of a levy. Although not modelled here, evidence from the Greater Manchester

---

[39] Purple Flag KPI Data
[40] Between the hours of midnight and 8am. We acknowledge that there are significant differences between the night-time economies in London (Islington) and Belfast - including different opening hours, and population density - which may limit the direct relevance of this comparison. However, in the absence of more evidence, this example is used as a provisional reference point.
[41] Homes and Communities Agency, Additionality guide, 2014
[42] Purple Flag KPI data. Night-time economy associated crimes between 18:00 hours and 06:00 hours.

Combined Authority has calculated that the cost per crime for policing, criminal justice, and health is estimated at £3,497.

Figure 4.4: Trends in Belfast night crime and effect of late-night levy



Caveats:

- A fourth step of estimating the GVA impacts associated with increased public safety could be undertaken if comparable analysis has been undertaken, but no other studies were found in the wider literature, so GVA analysis is not attempted for this scenario.
- Adjustments have been made for the counterfactual scenario (i.e. what crime levels may have been in absence of the intervention). However, other impacts may include displacement of crime to outside of the local area.
- It should be noted that the annual levy charge for businesses affected by the late-night levy can range from £300 to £4,440, depending on their rateable value[43]. This levy could place additional financial strain on businesses already facing significant expenses. The impact of the levy will also depend on how many venues contribute. Thus, further research is needed to understand the implications of instituting this levy.
- In absence of Belfast-specific counts of alcohol-related offences, total night-time offences are used as a reasonable proxy. It is noted however that not all offences in this period are alcohol-related.

4.4 Reforms to the surrender principle licensing system

The qualitative research highlighted stakeholders' views around changes to the licensing system in Northern Ireland. The surrender principle is a requirement under the Licensing Order 1996 that restricts total number of alcohol licences for pubs and off licences, where new licences can only be issued if an existing one is surrendered. This has been the subject of previous studies over many decades, including most recently the

[43] Late-night Levy, Police Reform and Social responsibility Act 2011, Home office

Independent Review of the Liquor Licensing System report by the University of Stirling [44]. This study highlighted that the nature of the licensing system is seen as a potential barrier to growth in the NI night-time economy. Below, findings from the report[45] are summarised:

- The existing surrender principle appears to do little to safeguard or revitalise the pub sector and has contributed to licences shifting away from pubs and towards retail outlets.
- The current licensing framework imposes extra costs on applicants, which limits diversification and innovation, including restrictions on the variety of products offered and the types of venues permitted to sell alcohol for on-site consumption.
- Pubs were shutting down in cities and rural communities, with many of the surrendered licences being purchased by small and medium-sized grocery retailers. The high cost of obtaining a licence also acted as an obstacle for potential new entrants, making it hard for new pubs to be established. As a result, although the surrender principle helps safeguard existing pub operators in a difficult market, it does not benefit the pub industry as a sector.
- Alcohol-related death rates in Northern Ireland are higher than those in England and Wales, and they continue to rise. The review highlighted that alcohol-related issues, including deaths, hospital admissions, and crimes linked to alcohol, are significant and often occur in areas with a higher concentration of alcohol-serving establishments. Health problems, in particular, are strongly associated with the number of off-licences in an area.

The following scenario analysis does not attempt to estimate the overall impacts of a change to this system[46]. As noted in the Stirling review, it is not possible to definitively quantify the business impact of abolishing or reforming the surrender principle, since there is no directly comparable system. The Stirling review also sets out options for addressing market failures without necessarily increasing the total number of outlets. Our approach, by contrast, represents a simplified scenario which assumes an increase in pubs and revenue[47] within the local area, as a result of reform. **The analysis does not include other impacts such as potential changes to policing and healthcare costs from increased crime, changes to licence fee revenue from existing venues or the potential public cost of reform. These effects are outside the scope of the GVA estimates and, where relevant, would be considered in separate fiscal and cost–benefit analyses. Further analysis would be required to investigate these impacts**.

Figure 4.5 below illustrates the steps taken to estimate the potential changes in revenue.

---

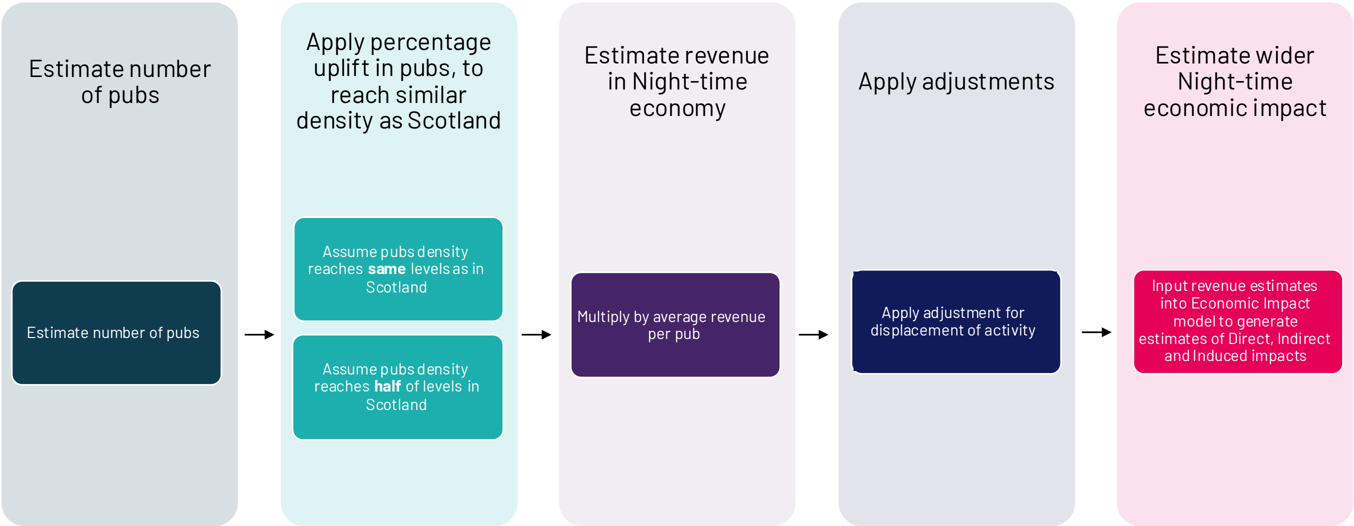
[44] Independent Review of the Liquor Licensing System in Northern Ireland including the Surrender Principle, University of Stirling, 2024

[45] https://www.stir.ac.uk/news/2025/february-2025-news/liquor-licensing-review-recommends-reform/

[46] Note that a Grant Thornton Review concluded that, because no other jurisdiction globally had abolished a similar principle, and because of limited concrete evidence on the actual value of licences at the time, firm conclusions could not be drawn as to the economic impact of its abolition.

[47] For the purposes of this scenario analysis, we define 'pubs' by the SIC code 'Public Houses and Bars', which encompasses bars, taverns, cocktail lounges, discotheques licensed to sell alcohol (with beverage serving predominant) and beer parlours.

Figure 4.5: Step-by-step process to estimate changes to public house revenue in the night-time economy



The following steps are taken:

Step 1: Estimate the number of pubs currently operating. The estimation of the number of pubs currently operating in the Local Government Districts of Belfast, Derry and Strabane, and Fermanagh and Omagh uses data from the ONS UK business counts – local units for 'Public Houses and Bars'. Based on this data, it is estimated that there were approximately 120 pubs in Belfast, 95 in Derry and Strabane, and 80 in Fermanagh and Omagh in 2024.

Step2: Apply a percentage uplift to pub numbers, to reach similar density as Scotland. This analysis adopts a similar approach to that used in the University of Stirling Independent Review of the Liquor Licensing System report[48], which models the effects of replacing Northern Ireland's current licensing system with one more aligned to the systems in Scotland and England/Wales. Whilst it uses different data sources, it follows the Stirling approach in that it assumes that this change would result in an increase in the number of licensed premises, with pub density rising toward levels observed in Scotland[49]. Given that Scotland has a relatively lower pub density, compared to in England and Wales[50] – this is considered the most conservative approach[51]. This projected increase in outlet density is then used to estimate the potential impact on pub numbers and associated revenue. It should be noted that local outlet density varies, where areas already at or above Scottish density would see smaller uplifts than assumed here. The figures below should therefore be read as broad-order.

- **Scenario 1 (Upper bound)** models a 24% increase in pub density in Belfast, Derry and Strabane, and Fermanagh and Omagh, based on the assumption that density would rise from the current level of 41 pubs per 100,000[52] population to align Scotland's rate of 51 pubs per 100,000. By applying this uplift to

[48] Independent Review of the Liquor Licensing System in Northern Ireland including the Surrender Principle, University of Stirling, 2024
[49] It should be noted that whilst the overall analytical approach is similar to that used by the University of Stirling, the exact figures used differ given the availability of data. Therefore, ONS IDBR data is used in the calculations to provide a single, nationally consistent source for both pub counts and density measures across NI and Scotland.
[50] Independent Review of the Liquor Licensing System in Northern Ireland including the Surrender Principle, University of Stirling, 2024
[51] However, it should be noted that there are key differences in the sector in Scotland, versus Northern Ireland.
[52] Pub Statistics, House of Commons Library, 2021

existing pub estimates (above) suggests there could be approximately 29 additional pubs in Belfast, 23 in Derry and Strabane, and 20 in Fermanagh and Omagh.

- **Scenario 2 (Lower bound)** models a more conservative estimate, assuming that pub density will increase by 12%, which represents half of the potential increase to align with Scotland's density (an increase of 41 per 100,000 population to 46 per 100,000). By applying this uplift to existing pub estimates (above) suggests there could be approximately 15 additional pubs in Belfast, 12 in Derry and Strabane, and 10 in Fermanagh and Omagh.

Step 3: Estimate revenue in the night-time economy. To estimate the potential revenue, the projected increase in pubs for each scenario is multiplied by the average revenue per pub/bar. This average (£307,845) was derived from total turnover across Northern Ireland pubs in 2019, divided by the number of pubs[53], and subsequently adjusted for inflation to current values[54].

Step 4: Apply adjustments for displacement. To account for potential displacement effects within the local area, revenue estimates are adjusted based on HCA additionality guidance[55]. Displacement occurs when new businesses draw customers away from existing businesses in the same area, resulting in a redistribution of spending rather than a net increase in economic activity. There are several factors that may influence displacement:

- Characteristics of new pubs – if new pubs are more diverse, or provide a new offering, this may reduce displacement since this may create additional demand.
- In areas of dense clusters of activity, there may be more displacement of demand if the area is already well served.
- Strong local economic growth and tourism may create excess demand, and therefore lower displacement.

To be conservative, and in line with HCA additionality guidance, a 'medium' displacement level of 50% is assumed, meaning half of the activity is assumed to be displaced from existing local establishments. While displacement may occur from outside the local area, this analysis focuses solely on local displacement effects.

Step 5: Estimate the wider night-time economic contribution. By applying a displacement factor adjustment, the estimated direct revenue in the night-time economy is provided in ranges:

- £2.3 million - £4.5 million of consumer spend per year in Belfast
- £1.8 million - £3.6 million of consumer spend per year in Derry and Strabane
- £1.5 million - £3 million of consumer spend per year in Fermanagh and Omagh.

[53] Independent Review of the Liquor Licensing System in Northern Ireland including the Surrender Principle, University of Stirling, 2024

[54] For the purposes of this analysis, the terms 'turnover' and 'revenue' are used interchangeably to denote the total income generated from sales. Values are adjusted to 2024 prices.

[55] Additionality guide, House and Communities Agencies, 2014, p.18.

These estimates are incorporated in the Nordicity's MyEIA™ Model which produces the following direct, indirect and induced GVA estimates:

Table 4.3: Estimated GVA from reforms to the surrender principle licensing system

	Belfast		Derry and Strabane		Fermanagh and Omagh	
	Lower bound	Upper bound	Lower bound	Upper bound	Lower bound	Upper bound
Direct GVA	£1,620,000	£3,230,000	£1,280,000	£2,560,000	£1,080,000	£2,160,000
Indirect GVA	£260,000	£520,000	£230,000	£460,000	£170,000	£340,000
Induced GVA	£530,000	£1,050,000	£440,000	£880,000	£360,000	£730,000
Total GVA	£2,400,000	£4,800,000	£1,950,000	£3,890,000	£1,610,000	£3,220,000

Therefore, reforming the surrender principle could contribute an estimated increase in direct, indirect and induced GVA of **£2.4 million - £4.8 million** in Belfast, **£2 million - £3.9 million** in Derry and Strabane, and **£1.6 million - £3.2 million** in Fermanagh and Omagh[56]. **It should be noted that this is a complex and contentious issue and this analysis is intended as a high level illustration of the potential impact of reform.**

Caveats to this analysis:

- While reforms to the surrender principle will affect both on- and off licence premises, this analysis focuses specifically on pubs, given their direct relevance to the night-time economy.
- This analysis illustrates a simplified scenario where reforms lead to an increase in revenue of pubs within the local area. However, it should be noted that as outlined in the University of Stirling report[57], there has been a long-term decline in the number of pubs, alongside an increase in off licences. Modest proposals to reform set out in the Stirling report may prevent further decline, through allowing for market entry for new pubs/bars without materially impacting on alcohol-related harms. For more information on the scale of this trend, geographical nature of licence movements and possible health outcomes, see the University of Stirling report[58].
- This analysis focuses on impacts on revenue and does not include other impacts such as potential costs to the public sector from increased crime or the potential public cost of reform. The analysis also does not consider differing costs such as business rates or VAT of running a pub or licensed venue. These effects are outside the scope of the GVA estimates and, where relevant, would be considered in

[56] When accounting for direct and indirect estimates only, reforms could contribute an estimated GVA of £2.7m-£4.5m in Belfast, £1.5m-£3m in Derry and Strabane, and £1.3 million - £2.5 million in Fermanagh and Omagh.

[57] Independent Review of the Liquor Licensing System in Northern Ireland including the Surrender Principle, University of Stirling, 2024

[58] Independent Review of the Liquor Licensing System in Northern Ireland including the Surrender Principle, University of Stirling, 2024

separate fiscal and cost-benefit analyses. Further analysis would be required to investigate these impacts.

- This analysis primarily reflects the Public Houses and Bars sector as identified in the ONS Inter-Departmental Business Register (IDBR), which is used since it is the most comprehensive and consistent UK business register. The IDBR classifies businesses by their primary economic activity rather than by alcohol-licensing status. As a result, some licensed premises that operate similarly to a pub may be coded under other categories and not appear in IDBR 'pub' counts, a pattern that can be more pronounced in rural areas. Figures should therefore be interpreted as a conservative estimate of all licensed premises. Notwithstanding this limitation, the IDBR remains a robust basis for assessing the broad order effects.

4.5 Wider considerations

Beyond the immediate impacts of policies that may support the night-time economy, below some potential wider effects are considered:

- The interventions could lead to displacement shifts within the night-time economy sector itself, but also affect demand for other sectors, like day-time entertainment and transportation. These impacts could be both positive (e.g. where higher demand for the night-time economy leads to higher demand for public transport), or negative (where night-time economy activity leads to a reduction in demand in other sectors). Whilst adjustments have been made for displacement, there may also be further displacement and substitution effects within the wider geographic areas.
- There may be some interactions between policy interventions. For example, safety improvements and enhanced public transport can mutually reinforce each other. For example, extended public transport could reduce the need for personal vehicles, which in turn could lower risks of alcohol-related traffic incidents and enhances public safety perceptions. Improvements in transport and safety could lead to increased willingness among workers to engage with night-time industries. This could reduce staffing shortages, lessening labour market constraints.

Conclusions

This research on the night-time economy in Northern Ireland reveals several key themes. The economic contribution of the night-time economy is prominent, with the hospitality sector involving restaurants, pubs, and hotels playing a crucial role. GVA modelling estimates the night-time economy contributed between £2.8 billion and £3.7 billion in Gross Value Added (GVA) in 2024. Specifically, Belfast's night-time economy contributed between £611 million and £784 million GVA, while Derry and Strabane district contributed between £193 million and £249 million, and Fermanagh and Omagh contributed £135 million and £176 million in GVA[59].

Transportation remains a significant barrier to night-time economy growth. Late-night transport options, including taxi shortages and high costs, limit accessibility and elevate safety concerns. Expanding late-night public transport is therefore a critical recommendation. It is estimated that extending late-night bus services in Belfast could contribute between £900,000 and £2.4 million in additional GVA[60].

Public safety perceptions are also crucial, particularly for vulnerable groups. Perceptions are influenced by lighting, the condition of public spaces, and social issues like homelessness and anti-social behaviour. An evidence review highlights mixed results on the impacts of potential interventions to support night-time safety.

Tourism's potential within the night-time economy is significant but underutilised. Promoting unique night-time experiences and addressing access and safety issues could attract more visitors who stay longer and spend more. In particular, Belfast Culture Night could support between £1.3 million and £3.3 million in GVA for Belfast's night-time economy[61].

Workforce shortages in hospitality significantly challenge the sector, exacerbated by competitive wages in other industries, transportation issues, and rising living costs. Diversifying the night-time economy beyond hospitality to include cultural events and non-alcohol-centric activities could broaden its appeal and audience diversity.

The surrender principle licensing system poses challenges to market entry and diversity within the night-time economy. While there is support to reform these laws to foster innovation, concerns over alcohol-related harm and wider safety issues are complex, as set out in the Independent Review of the Liquor Licensing System report by the University of Stirling. Illustrative analysis suggests that reform could support economic impacts between £2.4m - £4.8m in Belfast[62].

Realising the full potential of the night-time economy requires a collaborative approach (as seen in Manchester and the Republic of Ireland). Government agencies, businesses, transport providers, and

---

[59] The lower bound estimate reflects direct and indirect (supply chain) contributions, and the upper bound reflects direct, indirect and induced (household spending) estimates.

[60] This includes direct, indirect and induced GVA. When considering only direct and indirect GVA, these are between £730,000 to £1.9m annually.

[61] This includes direct, indirect and induced GVA. When accounting for direct and indirect GVA only, this could contribute an estimated GVA of £1m-£2.6m.

[62] As noted in the Stirling review, it is not possible to definitively quantify the business impact of abolishing or reforming the surrender principle, since there is no directly comparable system. Therefore, this figure represents a simplified scenario which assumes an increase in pubs and revenue. This analysis also excludes the wider social and fiscal costs of any changes to licensing rules, which fall outside the GVA assessment. This includes direct, indirect and induced GVA. When considering only direct and indirect GVA, these are between £2.7m to £4.5m annually

cultural organisations must work together to address challenges and exploit growth opportunities. A collective strategy based on reliable data and stakeholder engagement will be essential for fostering a thriving night-time economy in Northern Ireland.

Annex 1: Key definitions

This annex provides definitions for key terms used in the report, including an overview of the Purple Flag initiative, an accreditation for cities that demonstrate a safe, diverse, and vibrant evening and night-time environment.

Gross Value Added (GVA): A measure of the value of goods and services produced in an area, industry, or sector of an economy commonly used in planning and government decision-making. It represents the contribution to GDP made by an individual producer, industry, or sector. GVA can be calculated either using the Production Approach, using the value of output minus intermediate consumption (the cost of goods and services used in the production process), or the Income approach, which combines Compensation of Employees (wages and salaries), Gross Operating Surplus, and other taxes on production less subsidies on production. It is therefore a key indicator of the economic output of a particular area or sector.

Full Time Equivalents (FTE): Employment rates are a key indicator of the overall health of an economy. High employment generally indicates a strong economy with healthy demand for goods and services. A Full-Time Equivalent (FTE) is a unit of measurement to measure employment, that standardises the number of hours worked by both full-time and part-time employees. Instead of simply counting the number of employees, FTE calculates how many full-time employees would be needed to do the same amount of work. This provides a more accurate picture of employment figures.

Compensation of Employees (COE): Compensation of Employees is a primary component of Gross Value Added. It represents the portion of the value created by a business, industry, or economy that flows to labour in the form of wages, salaries, and benefits. The remaining value (the gross operating surplus) is what's left for capital (profits, dividends, etc.) after accounting for some taxes and subsidies.

Displacement: Displacement refers to the extent to which an intervention simply shifts economic activity from one area to another, rather than generating genuinely new activity. It's a critical concept because it helps to distinguish between gross and net impacts.

Purple Flag: Purple Flag is an accreditation programme run by the Association of Town and City Management (ATCM) in the UK and Ireland and aims to raise standards and improve the quality of towns and cities at night. To receive Purple Flag status, towns and cities must be welcoming to everyone, offer safe ways for visitors to travel home, provide a good mix of venues, and be appealing after dark. Receiving accreditation shows that a town or city is managing its night-time experience and thus attracting visitors, boosting the local economy.

Belfast achieved Purple Flag accreditation in 2019. Some of the Purple Flag initiatives that have been implemented in Belfast to improve the night-time economy and safety include:

- Creating the position of Belfast Night Czar to provide enhanced co-ordination and messaging for issues relevant to the night-time economy.
- Co-funding this research report to identify the economic value of the night-time economy and raise the profile across government of an under-appreciated sector.

- Leading the campaign to deliver late-night transport for Belfast, including co-ordination of over 1,000 business supporters.
- Providing marketing support for late-night Christmas transport each year, including distribution of promotional material to city centre hospitality venues.
- Supporting night-time volunteers, including enhanced profiling of their role and financial support for the SoS Bus.
- Supporting initiatives to improve the safety of the night-time economy, including Ask for Angela and the White Ribbon Campaign.
- Installing brighter street lighting and additional CCTV in both the Cathedral Quarter and Linen Quarter.
- Lobbying the City Council, and other stakeholders, for additional investment in night-time cleansing, improved wayfinding, and enhanced lighting & animation.
- The three business improvement districts who fund Purple Flag also fund various events relevant to the night-time economy, including Belfast Restaurant Week as well as significant ongoing support to culture & arts initiatives.

Belfast now ranks in the top 10 of UK cities in the Good Growth for Cities Index, outperforming the national average in key measures like jobs, health, transport, housing affordability, and safety. Though challenges like elevated crime levels remain, Belfast has achieved meaningful progress across multiple KPIs and continues to take proactive steps to support a safe, vibrant, and inclusive city centre.

Annex 2: Reviewing the evidence on policy impacts

This section contains a high-level review of the grey literature. The review explores the outcomes of policy interventions implemented in case studies from across the UK and internationally. The focus is on identifying some of the impacts of these interventions based on robust evaluations and insights from previous reports, if available. This section also incorporates high-level trend analysis from relevant cities to provide an indicative view of potential impacts. The analysis predominantly focusses on transport, licensing, and safety measures-areas highlighted by stakeholders as key priorities and where clearer comparative examples exist. Other relevant policy interventions have also been considered where appropriate[63].

Qualitative findings highlight that a lack of late-night public transport is a key barrier for growth of the Northern Ireland night-time economy

According to the Department for Infrastructure, cars accounted for 69% of all journeys in Northern Ireland in 2021[64]. In comparison, according to the National Travel Survey in England, cars made up 60% of all trips in 2023[65]. In Scotland and Wales, these figures are 62% and 75% respectively for travel to work methods[66] [67]. This greater dependency on private vehicles suggests there's an opportunity to develop and promote more accessible and efficient public transport alternatives, which could help align Northern Ireland with other areas of the UK.

A review of the available evidence demonstrates a mixed picture of the impact of late-night public transport on comparable cities in the UK, with some cities showing economic and social benefits from night-time services, while others have struggled with low passenger numbers and financial viability, leading to service reductions or withdrawals.

Dublin launched a NiteLink service in 1991, which provided buses between midnight and 4am on Friday and Saturday night. Cutbacks in the service took place in 2009[68] but by 2014, services were running again[69]. In December 2019, Dublin Bus introduced its first 24-7 bus services on two routes[70]. These services were part of a broader effort to enhance the city's night-time economy and provide continuous public transport options. Since then, the number of 24-hour routes has grown. As of 2025, there are 12 such routes, operating seven days a week[71].

---

[63] The overall approach involves a targeted, non-systematic review of literature to illustrate the range of evidence available. It is not intended to be an exhaustive or fully systematic review, rather it summarises key findings relevant to the project scope. The approach involved using search terms related to each intervention, and additional sources have been incorporated as provided by University of Stirling researchers. The University of Stirling Independent review also provides a detailed summary of available evidence.

[64] The Travel Survey for Northern Ireland Headline Report, Department for Infrastructure, 2021

[65] National Travel Survey, Department for Transport, 2023

[66] Transport, Scotland's Census, 2025

[67] Transport (National Survey for Wales), Welsh Government, 2023

[68] Dublin Bus, Irish Independent, 2009

[69] Dublin Bus, Irish Independent, 2009

[70] Two Bus Routes in Dublin go 24-hours, NTA, 2019

[71] Night Time Services, Dublin Bus

In Manchester, First Greater Manchester operated a network of night buses until 2015/2016, running until around 3:30 a.m. on Friday and Saturday nights, with a flat fare system. However, some of these services were withdrawn due to low passenger numbers and budget constraints[72]. In 2024, a 24/7-night bus service was introduced running from 11:45 until 6:55. Although it is too soon to tell impact, weekly average passenger numbers using buses between hours of 10pm and 7am had grown by 4%-6%, as of October 2024[73]. Between 1st September and 28th September:

- Approximately 7,000 individuals utilised the new hourly night buses since they commenced service.
- Existing late-night bus routes also experienced growth, with over 53,000 passengers traveling in one month.

In Glasgow, night bus services have operated historically, but experienced declining ridership and challenges led to suspension of the service. In 2021[74], First Glasgow reinstated weekend night buses, and were later expanded in 2022. After a proposed withdrawal announcement in 2023 due to low passenger numbers, there was public concern on the potential impact, and a decision was made to continue night services[75].

London introduced night tube services in 2016, with five out of eleven tube lines chosen to operate 24 hours on Fridays and Saturdays. A report by EY estimated that this change can bring significant economic impacts, including £138m of value every year, supporting 3600 jobs[76].

While this case study is not directly comparable to Northern Ireland due to differences in economic context and transport modes (for example, London's core night-time economy employment sector is 19 percentage points larger than Belfast's[77]), this study provides a useful reference point.

In terms of comparison to smaller UK cities with more rural ridership, in 2004, Brighton and Hove introduced their first 24-hour service, with late-night buses operating every 15 minutes between midnight and 3 a.m. In 2011, Brighton and Hove's overall transportation network was estimated to have contributed over £3 billion of GVA to the national economy[78], with buses composing 15% of all transportation modes in the city[79]. Based on the latest available data from 2021, the night-time economy contributed 4.1% to the UK economy, and 5.1% in 2019, representing £93.7 billion and £116.1 billion respectively[80].

The implementation of Brighton and Hove's 24/7 bus services has driven a rise in bus usage, which has seen a year-on-year increase from 30.2 million journeys in 2001 to 41.1 million in 2010[81]. Over this period bus services averaged 158 passengers per bus (all time average)[82]. Furthermore, the service has also positively contributed towards the perceptions of safety in the night-time economy. This is made evident as nearly two-thirds of people reported that they felt safe outside their local area at night due to the provision of the

---

[72] End of the night bus, Bolton News, 2016
[73] Bee Network night buses, Transport for Greater Manchester, 2024
[74] First Bus supports city's night-time economy with the return of night bus services, Glasgow Bus Alliance, 2021
[75] Glasgow night bus services, BBC, 2023
[76] Customer Service and Operational Performance, Transport for London, 2018
[77] ONS
[78] Brighton & Hove City Council - Local Transport Plan 3 - 2011
[79] CIHT - Buses in Urban Development 2018
[80] NTIA - NIGHT-TIME ECONOMY REPORT 2023
[81] Brighton & Hove City Council - Local Transport Plan 3 - 2011
[82] CIHT - Buses in Urban Development 2018

bus service[83]. This is particularly significant given that 36% of residents do not own a car[84], highlighting their reliance on the bus system.

- **The surrender principle licensing system in Northern Ireland was identified as a key issue in the qualitative research.**

Northern Ireland's alcohol licensing system is characterised by the 'surrender principle'. This means that the number of alcohol licences for pubs and off licences combined is capped, and new licences can only be issued if an existing one is surrendered. This system effectively controls the overall number of licensed premises, preventing market expansion and maintaining control over alcohol availability.

The Stirling report[85] provides a comprehensive review of the current system. The report analysed the economic impacts of the current licensed trade sector, as well as the relationship between alcohol-related deaths, hospital admissions and crimes. Some of the key findings are noted in Section 4.4. In addition, the research found that "reform can continue to effectively manage availability while better supporting the pub, bar and cultural venue sector in the long run. For example, by addressing the high cost of licences on the private market and an objections system that benefits incumbent businesses – both of which can stifle innovation and reduce diversity. At the same time however, existing businesses have genuine concerns about the future and reform needs to reflect this".

The report goes on to say that "proposals seek to strike a balance between these competing requirements: supporting pubs, enabling innovation, protecting health, and modernising a system that has, in many respects, remained unchanged for decades".

The report explains that the proposed reforms would maintain a limit on the number of licensed premises, while allowing expired licences to be reassigned in order to introduce new options for consumers. It also states that the reforms would restrict the number of off-licences to prevent uncontrolled expansion and to protect public health, while addressing longstanding structural issues that would otherwise remain unresolved.

The Stirling report provides a comprehensive review of the available literature. One example noted included a similar approach to licensing in North America, where most jurisdictions formally limit the number of alcohol retail licences, and the most common approach was to establish a maximum number of outlets per population. The limits set vary widely across the different jurisdictions. It is important to note that whilst there is a combined overall cap, the number of off-licence premises is not capped.

In England, a study evaluated the effects of introducing a Cumulative Impact Policy (CIP) in seven Cumulative Impact Zones (CIZs) within an English local authority in 2013. The policy aimed to reduce alcohol-related harm by seeking to constrain growth in the density of alcohol retail premises. Using time-series data from 2008–2016, the researchers assessed impacts on licensing activity, alcohol availability, crime, ambulance call-outs, and alcohol sales. The study found small short-term benefits, particularly in reducing crime and alcohol sales, but limited sustained impact.[86] Importantly, the authors note that the CIP did not, in

[83] Brighton & Hove City Council - Local Transport Plan 3 - 2011
[84] Brighton & Hove City Council - Local Transport Plan 3 - 2011
[85] Independent Review of the Liquor Licensing System in Northern Ireland including the Surrender Principle, University of Stirling, 2024
[86] Increasing powers to reject licences to sell alcohol: Impacts on availability, sales and behavioural outcomes from a novel natural experiment evaluation, Prev Med, 2018

practice, reduce outlet density: licensing approvals within the CIZs did not decline over the longer term. The limited sustained benefits therefore reflect the absence of a sustained reduction in availability, rather than evidence that reduced outlet density would be ineffective. The study concludes that the lack of sustained benefits was in part because the policy failed to control the density of premises, as application approvals did not decline over the longer term.

Additionally, another study examined whether the presence of cumulative impact zones (CIZs) in England and the rigour of licensing enforcement, were associated with changes in alcohol-related harm, measured by hospital admissions. As a result, the study found that greater intensity of local alcohol licensing is linked to larger reductions in alcohol-related hospital admissions, with an additional average decrease of 2% per year, equating to roughly eight fewer unique admissions per 100,000 people in 2015 compared with what would have been expected without such policies[87].

Moreover, a separate study examined whether licensing policies that restrict the spatial and/or temporal availability of alcohol are linked to reductions in alcohol-related crime. Similarly, the study found that, in England, areas with stricter licensing and enforcement saw roughly 4–6% greater declines in violent crime, sexual offences, and public order offences up to 2013 than areas without such policies[88].

- **Late-night licences and other alcohol licensing policies were also discussed in the qualitative research.**

Prior to 2021 in Northern Ireland, certain licensed premises, such as hotels, restaurants and large pubs, upon successful application to the court were allowed to serve alcohol until 1am. However, in October 2021, the Northern Ireland Executive announced significant changes to later licensing laws. These changes, mean that it is easier for premises to operate later, and pubs and hotels can apply to sell alcohol until 2am, with an additional hour of "drinking up time". However, as highlighted above in the stakeholder interviews and our research, the system remains more restrictive than other areas in the UK and Europe. [89]

In England and Wales, the system is governed by the Licensing Act 2003. This act was introduced to support flexible licensing hours, including the potential for 24-hour alcohol sales (subject to local approval), aiming to reduce problems associated with fixed closing times — especially the "11pm rush" that led to street disorder. The system allows venues to apply for a licence from the local council, and as such, the ease of obtaining a late licence depends on the local council policies. In 2025, legislation was enacted to grant the Mayor of London powers to overrule local council decisions that prevent venues from obtaining late-night licences. This step is intended to reduce the regulatory constraints to improve economic growth. The approach may be expanded to include other areas, such as the West Midlands and Greater Manchester[90].

The Licensing Act 2003 was evaluated by the UK Government in 2008[91]. This early study found that overall alcohol consumption declined following the Act's introduction, and total incidents of crime and disorder

---

[87] https://jech.bmj.com/content/70/3/231
[88] Testing the impact of local alcohol licencing policies on reported crime rates in England, National Institute of Health, 2016
[89] The report acknowledges that later trading hours for licensed premises, particularly after midnight, are associated with elevated levels of violence and crime and greater demand on health services. This can be made evident in Aberdeen, where extending late-night trading hours in bars led to a significant 17.4% relative increase in weekend night-time alcohol-related ambulance call-outs compared with Edinburgh, a control group, indicating increased harm from later trading.
Source: The impact of later trading hours for bars and clubs on alcohol-related ambulance call-outs and Crimes in Scotland
[90] Supporting the UK's NTE: Safeguarding British nightlife in challenging times and a changing world
[91] EVALUATION OF THE IMPACT OF THE LICENSING ACT, Department of Culture, Media and Sport, 2008

remained stable, with some areas even reporting reductions in evening and night-time violence. Note that other economic factors may have also influenced this impact. Subsequent independent evaluations present a more nuanced picture: nationally, trends in consumption and crime were shaped by wider economic conditions; locally, areas with more intensive licensing activity (e.g., cumulative impact policies and stricter enforcement) saw additional reductions in alcohol-related hospital admissions and violent/public order offences, while extensions of trading beyond midnight are associated with increased harms (see Annex 2).

Whilst parts of the UK and Europe have moved towards more flexibility in granting late-night licences, other cities worldwide have implemented more restrictions over time. Sydney, Australia implemented "lockout" laws in 2014[92]. These laws enforced a 1:30 am entry cutoff and 3 am last-drinks rule in the CBD and Kings Cross precincts, with the aim to reduce violence in the night-time economy. The impacts of the laws were mixed. In the lockout precincts, non-domestic assaults decreased within the range of 3.3%-28.8% following the introduction of lockout laws in 2014. It should be noted however that there were significant reductions in the number of people visiting the precincts, with up to 80 per cent less foot traffic, which could account for the higher decrease in alcohol-related non-domestic assaults in the precinct[93].

The lockout laws reportedly led to the closure of at least 180 venues (bars and pubs) within the affected districts and a broader decline in nightlife activity across the city[94]. Policymakers responded by gradually relaxing the laws from 2016 onwards, and completely removing them by 2021, to rebalance safety objectives with the needs of a vibrant night-time economy. Whilst this case study may not be directly comparable to Northern Ireland, it does demonstrate that measures to restrict opening hours can have a negative impact on the night-time economy.

Conversely, a study on restrictions in pub closing times and lockouts in Newcastle, Australia was carried out[95]. In 2008, the Central Business District (CBD) of Newcastle, Australia (530,000 population), implemented earlier pub closing times from 5am – 3:30am. The study found that recorded assaults decreased from 99/quarter before the restriction to 68/quarter in the early post-change period and 71/quarter in the later post-change period[96]. The study also highlighted that according to previous research, there was a one-third decline in assaults in the following 18-months post restriction[97].

A study by the Norwegian Institute for Alcohol and Drug Research and Swedish Institute for Social Research[98], aimed to estimate the effect of small changes (±2 hours) in on-premise alcohol closing times on violence, and to assess whether the effect was symmetrical for extensions and restrictions. Using a quasi-experimental design, the study analysed police-reported assaults across 18 Norwegian cities focusing on night-time incidents in city centres at weekends.

Consequently, the study reported that for each 1-hour extension of closing time was associated with an increase of 4.8 assaults per 100,000 inhabitants per quarter, equating to approximately a 16% rise. In contrast, corresponding decreases were reported when hours were restricted, indicating a symmetrical

---

92 SYDNEY'S NIGHT TIME ECONOMY, City of Sydney, 2019
93 SYDNEY'S NIGHT TIME ECONOMY, City of Sydney, 2019
94 Sydney 'lockout' laws, BBC, 2019
95 Restrictions in pub closing times and lockouts in Newcastle, Australia five years on, 2014
96 Restrictions in pub closing times and lockouts in Newcastle, Australia five years on, 2014
97 Restrictions in pub closing times and lockouts in Newcastle, Australia five years on, 2014
98 The impact of small changes in bar closing hours on violence. The Norwegian experience from 18 cities, Addiction Volume 107, Issue 3, 2012

effect[99]. Altogether, the study concluded that minor extensions to trading hours can result in increases in night-time violence, whilst modest restrictions tend to reduce it, providing supporting evidence that restricted closing hours is linked to lower weekend assaults in city centres.

Further research[100] aimed to identify 'sweetspot' policy options that reduce alcohol-related harms and ease pressures on public services, while minimising negative effects on hospitality and business performance, with a particular focus on the impact of changes to serving and closing hours in the night-time economy. The report found that, restrictions on late-night trading and other measures lead to an increase or stability in the number of licensed premises trading and customer attendance, and live music activity in one region was unaffected[101]. The study also noted that earlier closing may reduce operating costs without materially reducing revenue[102].

Furthermore, the study reported significant reductions in ambulance attendances following trading-hour restrictions, alongside improvements in public safety, particularly for more severe outcomes such as serious assaults and hospital admissions[103].

- **Qualitative evidence reveals that concerns around public safety are a significant barrier to the growth of the night-time economy. This section examines evidence on initiatives aimed at improving safety - such as late-night levies and related measures - and their potential impact.**

As part of the Police Reform and Social Responsibility Act 2011 ('the 2011 Act'), licensing authorities in England and Wales have the power to introduce a 'late-night levy' on premises licensed to sell alcohol in the authority's area. The levy applies during a "late-night supply period" (i.e. between midnight and 6am) and net revenue raised goes towards the costs of policing the late-night economy. The net-revenue must be shared between the relevant police and crime commissioner (PCC) and the licensing authority, composing a minimum of 70% and 30% split accordingly[104]. This is relevant to the Northern Ireland night-time economy because funds raised must link to the sale and provision of late-night alcohol, therefore funding related to arrangements such as:

- The reduction of crime and disorder.
- The promotion of public safety.
- The reduction or prevention of public nuisance.
- The cleaning of any relevant highway or relevant land in the local authority area[105].

A process evaluation[106] was conducted to describe how system stakeholders hypothesise the levy may create impacts and generate changes in the local area. The study found that stakeholders from different interest groups had diverse opinions about its likely impacts.

---

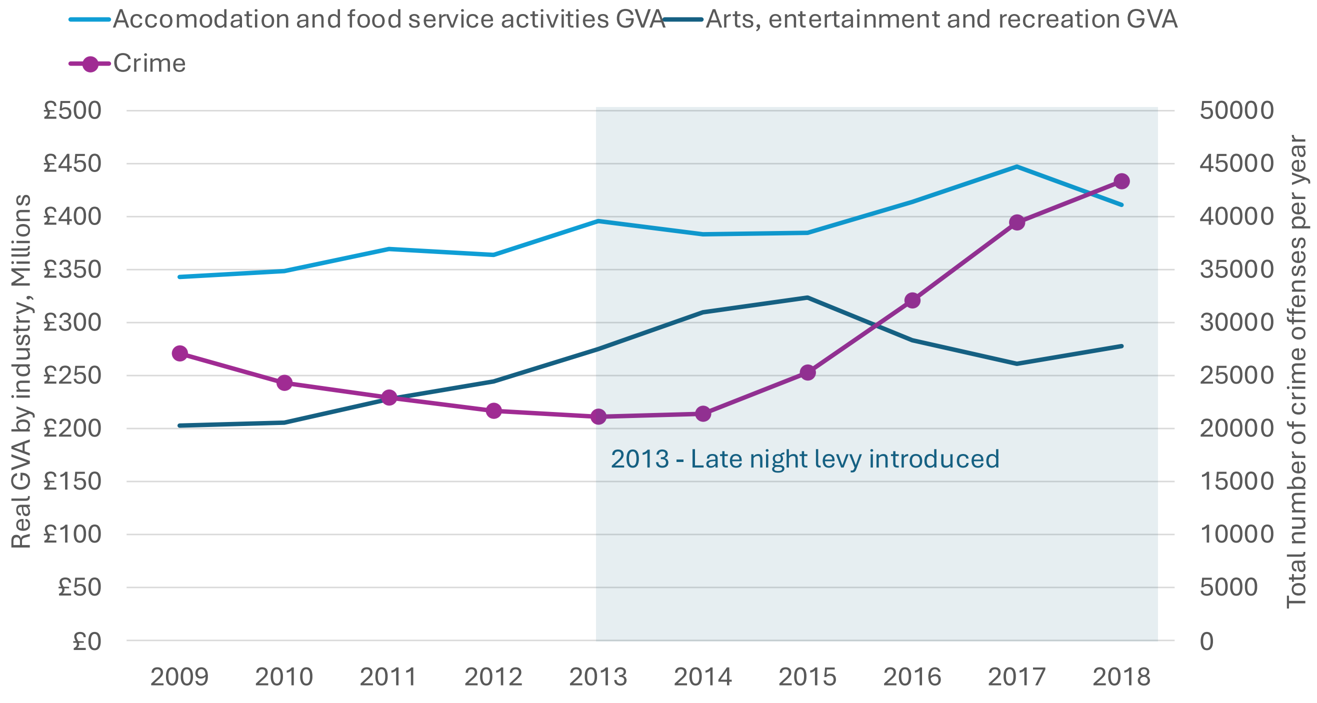
[99] The impact of small changes in bar closing hours on violence. The Norwegian experience from 18 cities, Addiction Volume 107, Issue 3, 2012
[100] Reducing alcohol harms whilst minimising impact on hospitality businesses: 'Sweetspot' policy options
[101] Reducing alcohol harms whilst minimising impact on hospitality businesses: 'Sweetspot' policy options
[102] Reducing alcohol harms whilst minimising impact on hospitality businesses: 'Sweetspot' policy options
[103] Reducing alcohol harms whilst minimising impact on hospitality businesses: 'Sweetspot' policy options
[104] Alcohol licensing: the late-night levy, House of Commons Library, 2025
[105] Alcohol licensing: the late-night levy, House of Commons Library, 2025
[106] https://bmjopen.bmj.com/content/12/8/e050913

Supporters of the levy argued that it could reduce crime and anti-social behaviour by providing additional policing funds. Critics argued that it could "force venues to vary their hours or close, cluster closing times, reduce night-time economy diversity and undermine public–private partnerships". The study found that "in the first 2 years, levy-funded patrols developed relationships with the licensed trade and the public. The late-night levy did not undermine public–private partnerships and while some premises varied their hours, these changes did not undermine the intervention's viability, nor significantly cluster venue closing times, nor obviously damage the area's reputation for having a diverse night-time economy".

In addition to this study, below a few examples across England are selected, where evidence (or publicly available data) is available before and after the introduction of the levy.

Newcastle was the first city in the UK to implement a late-night levy in November 2013[107], requiring licensed premises authorised to sell alcohol between midnight and 6am to pay an annual fee ranging from £299 to £4,400. The levy aimed to address the costs associated with managing the night-time economy, including tackling alcohol-related crime and disorder. The funds collected have been used to support initiatives such as taxi marshalling, CCTV improvements, street cleaning, and personal safety initiatives. The levy covers the entirety of Newcastle upon Tyne City Council, a city-wide area not limited to specific districts[108].

Figure B1: Trends in night-time economy sector GVA and crime rates in Newcastle



Source: ONS Recorded crime at Local Authority level, Regional GVA by industry, local authorities

Figure B1 shows a mixed picture on the impact of the levy. On the one hand, total criminal offenses per year increased by 38% in the five years following the introduction of the levy. On the other hand, GVA in the

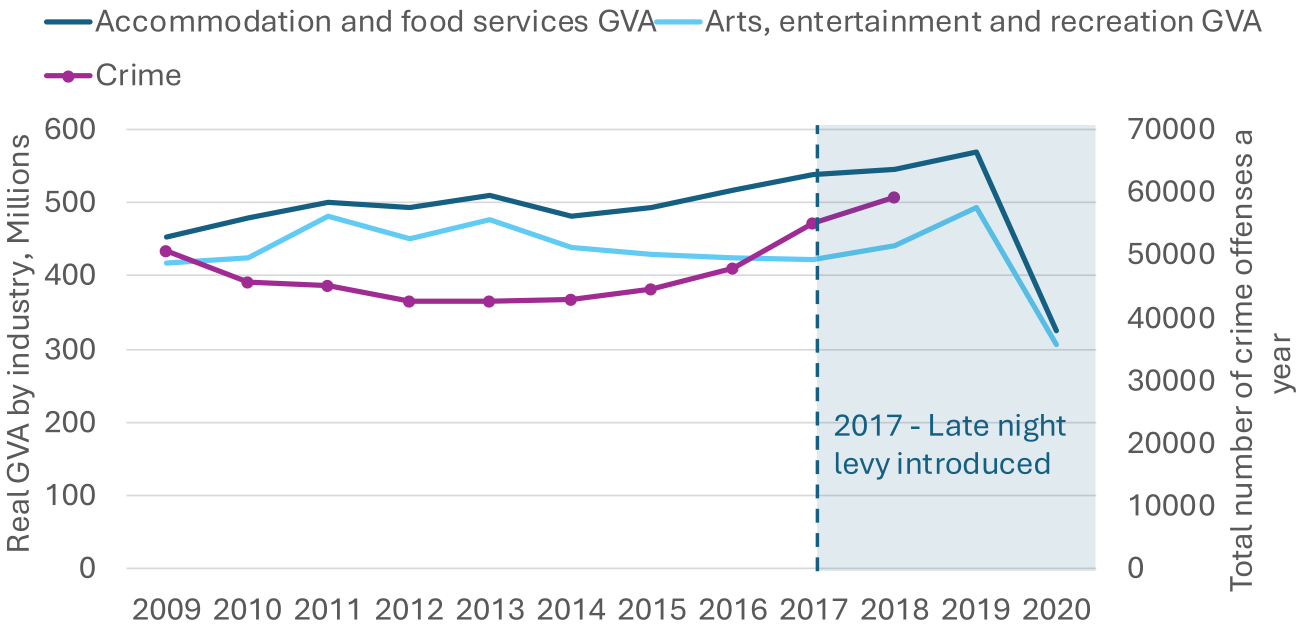
[107] DECISION TO INTRODUCE A LATE-NIGHT LEVY IN THE CITY OF NEWCASTLE UPON TYNE, NEWCASTLE UPON TYNE CITY COUNCIL, 2013
[108] NEWCASTLE UPON TYNE CITY COUNCIL. LATE-NIGHT LEVY, 2013

Accommodation, and food services sector and Arts, Entertainment and Recreation sector increased by 12% and 26% respectively following the introduction.

Without undertaking a robust impact evaluation to determine the counterfactual (what would have happened without the levy), we cannot say whether the introduction of the levy has had an impact, as there will have been lots of other factors influencing these economic variables, and crime statistics[109]. It should also be noted that there may be some reverse causality with crime and the levy introduction (in that the levy may have been introduced to areas which are struggling with crime anyway).

Liverpool also introduced a late-night levy in April 2017[110], using the funds to support extra policing, targeted safety operations, and city-centre cleaning—helping to manage crime and maintain public safety in the night-time economy. The levy covers all premises in the City of Liverpool local authority area, exclusive of the broader Liverpool City Region.

Figure B2: Trends in night-time economy sector GVA and crime rates in Liverpool



Source: ONS Recorded crime at Local Authority level, Regional GVA by industry, local authorities

Figure B2 also presents a mixed picture – total recorded criminal offenses rose by 34% in the year following the introduction of the levy[111]. However, excluding 2020 (due to Covid-19), GVA in the 'Accommodation, and food services' sector and 'Arts, Entertainment and Recreation' sector increased by 11% and 2% respectively following the introduction.

As above, we cannot determine the impact of the levy without conducting an impact evaluation in line with Magenta Book guidance, and trends do not provide sufficient evidence to determine the impact on the night-time economy.

---

[109] It should also be noted that in absence of night-time economy specific crime statistics, total crime statistics have been used as a proxy.
[110] Liverpool bar and club 'late-night levy', BBC, 2016
[111] Compared to the previous 5 years. ONS dataset was discontinued post 2018, and replaced with a dataset that was not comparable to previous years. It should also be noted that in absence of night-time economy specific crime statistics, total crime statistics have been used as a proxy.

Nottingham also introduced a late-night levy in 2014, requiring licensed premises operating between midnight and 6am to pay an additional fee. The levy aimed to fund policing and management of the night-time economy. However, in 2022, Nottingham City Council decided to revoke the levy[112], to alleviate financial pressures on smaller businesses, especially in the wake of the COVID-19 pandemic. Similar levies have also been withdrawn in areas such as Southampton and Cheltenham. The Campaign for Real Ale (CAMRA) also stated that the levy restricts consumer choice and should be imposed only on licensed premises found to be individually responsible for alcohol-related disorder, rather than as a blanket charge for all premises [113].

Islington implemented the levy in November 2014, which helped fund additional police officers, a dedicated Night Safe Hub, and extra resources for managing alcohol-related disorder and ensuring public safety in the night-time economy.

- The council found that in the 12 months following the introduction, there was a 17% reduction in alcohol-related crime at night[114].

In 2015, Luton created a BID encompassing the night-time economy, which aimed to achieve the Purple Flag accreditation, alongside exploring several policies such as the Early Morning Restriction Order, a late-night levy, and a matrix of stress areas. The Order aims to restrict the sale and supply of alcohol, a nuance difference between late-night levies, with the objective of reducing Anti-Social Behaviour (ASB) and crime. Whilst simultaneously attempting to diversify the offerings in the town centre. As a result,

- Crime and ASB rates have decreased, while footfall has seen a 5% increase after 5.00 pm due to these initiatives.
- Furthermore, due to cross-sector collaboration, the night-time economy offers greater diversity with new operators and enhanced existing businesses[115].

In addition, Chester has established a dedicated Night-time Economy Task Group. The team was established to evaluate the management of the night-time economy from a licensing perspective, ensuring that optimal management practices were being implemented. This initiative has significantly improved public confidence, with nearly 70% of people feeling safe at night due to targeted efforts to enhance safety and vibrancy[116].

In South Tyneside, the council established a mandatory safeguarding training for all taxi and PHV drivers, and licensed premises staff. Having identified the actors playing a crucial role in the night-time economy, due to their unique opportunity to identify potential victims and suspicious activity patterns. The council commenced numerous large scale training sessions, totalling over 1,000 individuals. As a result, according to Northumbria police reports:

- South Tyneside has seen a 52% increase in vulnerability reports[117].

---

[112] Nottingham: Late-night levy revoked, BBC, 2022
[113] https://committees.parliament.uk/writtenevidence/70345
[114] ISLINGTON LATE-NIGHT LEVY: REVIEW OF FIRST YEAR OF OPERATION
[115] Approaches to managing the night-time economy – Local Government Association
[116] Approaches to managing the night-time economy – Local Government Association
[117] Approaches to managing the night-time economy – Local Government Association

Therefore, this enables policing to be more aware of such vulnerabilities, leading to increased action to effectively protect those affected.

Other evidence provided by the College of Policing[118] supports the effectiveness of targeted, intelligence-led policing in reducing violence within the night-time economy. An evaluation found that Interventions such as the TASC project, which involve enforcement efforts directed at high-risk premises, have demonstrated reductions in alcohol-related harm. In contrast, untargeted, high-visibility patrols show mixed results and may be insufficient on their own to impact rates of violence or public perceptions of safety.

Similarly, the College of Policing[119] report that comprehensive, multi-agency strategies such as the STAD model from Stockholm (which combines licensing enforcement, bar staff training, and public awareness) has robust evidence to suggest pilot interventions are associated with addressing factors that promote the harmful use of alcohol.

- **Other potential policy interventions of interest to support the night-time economy include measures such as increased investment in attractions, events and changes to café and pavement licensing.**

A range of policy interventions could be considered to support Belfast and the wider Northern Ireland night-time economy. While not all are directly comparable to the context in Belfast, they provide some useful insights into how different levers can influence night-time activity. A selection of examples is outlined below.

In London, the Grassroots Music Venue Rescue Plan was launched in 2015, which aimed to address the decline observed in the city's grassroots music venues, as well as to assess their importance to London's cultural and economic life, and the potential consequences of their disappearance. The plan revealed that between 2007 and 2015, London lost over a third (35%) of these venues. Unrolling in three phases, the plan involved establishing a Music Venues Taskforce, the creation, and implementation of the Rescue Plan, and introduced London's first 'Night Czar' to enhance the night-time economy. As a result, the Rescue Plan Progress Report of January 2017 indicated that for the first time in a decade, there was no net decline in London's grassroots music venues[120].

In response to the pandemic, the UK government introduced temporary, fast-tracked pavement licensing rules in 2020 under the Business and Planning Act 2020. These rules made it easier and quicker for businesses to obtain licences to place furniture on public highways (e.g., tables, chairs). However, there is not enough evidence to disentangle impacts of these measures from the wider covid-19 context.

Established in 2017/18, Nocturnal at Melbourne Museum merges traditional museum offerings with live performances, creating 'transformational after-hours experiences' for adults, especially young audiences. Extended hours and partnerships with festivals like VAMFF (jazz and fashion festivals) and Melbourne Writers Festival have strengthened creative collaborations and regional connections. As a result,

- This series attracted over 17,000 visitors in its first year and over 13,000 in the next,

---

[118] Reducing violence in the night-time economy, College of Policing, 2022
[119] Reducing violence in the night-time economy, College of Policing, 2022
[120] Creating a Healthy Night-Time Economy: Key Culture Indicators for World Cities. BOP Consulting

- with 17% first-time attendees[121].

Altogether, this initiative highlights the potential to increase attraction of the night-time economy, converting what is conventionally a daytime activity to an innovative night-time experience. Therefore, contributing a positive value towards Melbourne's substantial night-time economy of $3.5 billion and festive reputation.

Facilitated by the European Capital of Culture investments, Tallinn established new cultural and music venues and revitalised Telliskivi, significantly enhancing its nightlife and visitor attraction. Since 2021, the city has further supported its night-time economy by appointing a dedicated advisor and allocating funds for the development of night-time cultural activities and services. Notably, a pilot project introducing four night-bus lines operating between 00:30 and 5:00am on weekends was launched in May 2023. The initiative received positive feedback, with 90% of surveyed passengers advocating for its permanent establishment, leading to plans for expansion in 2024 to cover additional neighbourhoods[122].

Moreover, Tallinn rolled out a financial support measure for live music venues, offering up to €15,000 to those staging a minimum of ten ticketed concerts over six months. As of 2022, nightlife-related sectors in Tallinn:

- employed 14,792 individuals,
- and generated a taxable turnover of €738.13 million[123].

Approximately half of the city's 400 bars and restaurants continue operations until 10pm or later, and the city boasts around 20 venues recognised as music spaces or clubs along with 11 cinemas and 17 theatres. Additionally, many services remain operational after dark, including most of the 150 public parks, university libraries, and grocery stores open until 11pm, with certain gyms, shops, pharmacies, and fast-food outlets available for 24 hours.

[121] Creating a Healthy Night-Time Economy: Key Culture Indicators for World Cities. BOP Consulting
[122] urbact.eu: Cities After Dark Baseline Study and Network Roadmap
[123] urbact.eu: Cities After Dark Baseline Study and Network Roadmap

Annex 3: MyEIA™ model

The following annex provides a detailed specification of the construction of the MyEIA™ Model as a tool for estimating indirect, induced and total economic contribution, as well as regionalised contribution at Local Government District (LGD) level.

Direct estimates

Estimated consumer spend in Northern Ireland was allocated across 4 tourism industries:

SIC 49 – Land transport

SIC 55 – Accommodation

SIC 56 – Food and beverage serving activities

SIC 93 – Sports services and amusement and recreation activities.

- Calculation of direct GVA

The GVA ratio (a_i) was calculated for each of the 4 tourism industries (SIC 49, 55, 56 and 93) based on data found in the NISRA 2019 I-O tables. These ratios were calculated as:

$$a_i = GVAi / z_i$$

where:

GVA_i is the value of GVA generated in industry *i* as per the 2019 I-O tables
z_i is the total value of output in industry *i* as per the 2019 I-O tables

The total direct GVA impact across all the tourism industries (g*) was calculated in the following manner:

$$g^* = a'y$$

Where:

a is a 4 x 1 vector of a_i
y is a 4 x 1 vector of y_i (gross consumer spending)

- Calculation of direct COE

The COE ratio (b_i) was calculated for each of the 4 tourism industries based on data found in the NISRA I-O tables. These ratios were calculated as:

$$b^i = COE^i / z^i$$

where:

COE_i is the value of COE generated in tourism industry *i* as per the 2019 I-O tables
z_i is the total value of output in tourism industry *i* as per the 2019 I-O tables

The total direct COE impact across all tourism industries (w*) was calculated in the following manner:

$$w^* = b'y$$

Where:

b is a 4 x 1 vector of b_i
y is a 4 x 1 vector of y_i (gross consumer spending)

- Estimation of direct employment

The number of direct jobs (measured in FTEs) was estimated by dividing the COE impact in each of the 4 tourism industries (w_i) by the average FTE cost in each tourism industry (m_i).

$$q_i = w_i / m_i$$

where:

w_i is the total wage impact (measured in £) in tourism industry *i*
m_i is the average FTE cost in tourism industry *i*

Total direct employment (q*) was arrived at by summing the employment impacts (qi) across the 4 tourism industries.

$$q^* = \sum_i q_i$$

Indirect estimates

Indirect contributions are estimated using Nordicity's MyEIA™ Model. This model utilises the 2019 I-O tables published by NISRA, along with other economic data (e.g. median wages) to estimate how increased purchases of goods and services translate into incremental employment, COE and GVA.

- Construction of input-purchases vector

Data collected through primary and secondary research was used to prepare a profile of input purchases in each sub-sector and value chain segment. After removing expenditures on sources of value added (i.e. COE, mixed income), the remaining expenditures are mapped to a 62 x 1 vector (*x*) of industries (corresponding with the products listed in the 2019 input-output tables published by NISRA).

- Estimation of indirect output

The 2019 Leontief inverse matrix (L) for the Northern Ireland economy was derived from the 2019 input-output tables published by NISRA. The following formula was then used to estimate a 1 x 62 vector (y) containing the changes in output, y_i, in each industry as a result of the input purchases arising from each sector.

$$y = x'L$$

Where:

y is a 1 x 62 vector of changes in output (y_i)
x is 62 x 1 vector of input-purchase expenditures (by receiving industry)
L is the 62 x 62 Leontief inverse matrix

- Calculation of indirect GVA

The GVA ratio (a_i) was calculated for each of the 62 industries listed in the NISRA I-O tables and L. These ratios were calculated as:

$$a_i = GVAi / z_i$$

where:

GVA_i is the value of GVA generated in industry *i* as per the 2019 I-O tables
z_i is the total value of output in industry *i* as per the 2019 I-O tables

The total indirect GVA contribution across all industries (g*) was calculated in the following manner:

$$g^* = a'y$$

Where:

a is a 62 x 1 vector of a_i
y is a 62 x 1 vector of y_i

- Calculation of indirect COE

The COE ratio (b_i) was calculated for each of the industries listed in the NISRA I-O tables. These ratios were calculated as:

$$b^i = COE^i / z^i$$

where:

COE_i is the value of COE generated in industry *i* as per the 2019 I-O tables
z_i is the total value of output in industry *i* as per the 2019 I-O tables

The total indirect COE contribution across all industries (w*) was calculated in the following manner:

$$w^* = b'y$$

Where:

b is a 62 x 1 vector of b_i
y is a 62 x 1 vector of y_i

- Estimation of indirect employment

The number of indirect jobs (measured in FTEs) was estimated by dividing the COE contribution in each industry (w_i) by the average FTE cost in each industry (m_i).

$$q_i = w_i \,/\, m_i$$

where:

w_i is the total wage impact (measured in £) in industry *i*
m_i is the average FTE cost in industry *i*

Total indirect employment (q*) was arrived at by summing the employment impacts (qi) across the 62 industries.

$$q^* = \sum_i q_i$$

Induced estimates

Nordicity's MyEIA™ Model also provides estimates of induced contributions. For Northern Ireland, these estimates are not based directly on NISRA's I-O tables. Instead, they are based on the average ratio of Type II and Type I output multipliers in the Northern Ireland economy (Ω), published by NISRA.

$$\Omega = \omega_{TYPE\ II} \,/\, \omega_{TYPE\ I}$$

Where:

$\omega_{TYPE\ I}$ is the arithmetic average of Type I multipliers across all industries
$\omega_{TYPE\ II}$ is the arithmetic average of Type II multipliers across all industries

- Estimation of induced output

The values of direct and indirect output were summed to arrive at an estimate of Type I output.

$$y_{TYPE\ I} = y_{DIRECT} + y_{INDIRECT}$$

The Type I output was then multiplied by Ω to arrive at an estimate of Type II output.

$$y_{TYPE\ II} = \Omega\,(y_{TYPE\ I})$$

$$y_{INDUCED} = y_{TYPE\ II} - y_{TYPE\ I}$$

- Estimation of induced GVA

The total value of induced impact GVA was estimated by multiplying the economy-wide GVA-to-output ratio (as per the 2019 I-O tables) by the estimate of Type II output.

$$g_{INDUCED} = (a^*)\cdot(y_{INDUCED})$$

Where:

a*is the GVA-to-output ratio across all industries (0.53)

- Estimation of induced COE

The total value of induced impact COE was estimated by multiplying the economy-wide COE-to-output ratio (as per the 2019 I-O tables) by the estimate of $y_{INDUCED}$.

$w_{INDUCED} = (b^*)\cdot(y_{INDUCED})$

Where:

b*is the COE-to-output ratio across all industries (0.29)

- Estimation of induced employment

The number of induced impact FTEs ($q_{INDUCED}$) was estimated by dividing the estimate of induced COE ($w_{INDUCED}$) by the average FTE cost across the UK economy (m*).

$$q_{INDUCED} = w_{INDUCED} / m^*$$

Where:

m*is the median full-time wage (excluding overtime) in the Northern Irish economy in 2024 (£36,304).

Total economic estimates

The total economic contribution in terms of GVA, COE and employment was arrived at by summing the estimates of the direct, indirect and induced contributions.

Regional and local economic estimates

The MyEIA™ Model can also estimate direct, indirect and induced contributions in terms of employment, COE and GVA for selected LGDs in Northern Ireland. This regionalisation of the model is based on location quotients (LQs) published by NISRA.

The LQs are used to derive regional-supply ratios (λ) for a given geographic jurisdiction. Where λ>1, it is set equal to 1.

These regional-supply ratios are used to adjust the input purchase expenditures vector (x) to approximate the portion of input purchases met by suppliers located within a given geographic jurisdiction.

$$X_{REGIONAL} = x_I \bullet \lambda_I$$

Where:

x_i input-purchase expenditures (by receiving industry *i*)
λ_I is the supply ratio for industry *i*.

The regional-supply ratios are also used to create a regionalised Leontief inverse matrix ($L_{REGIONAL}$) in the following manner:

$$L_{REGIONAL} = (\lambda' A)^{-1}$$

Where:

λ is a 62 x 62 diagonal matrix of regional-supply ratios
A is a 62 x 62 matrix of input-output coefficients

The regionalised Leontief inverse matrix is then used to calculate the indirect output vector.

$$y_{REGIONAL} = x'L_{REGIONAL}$$

Where:

$y_{REGIONAL}$ is a 1 x 62 vector of changes in output (y_i) in a given geographic jurisdiction
x is 62 x 1 vector of input-purchase expenditures (by receiving industry)
$L_{REGIONAL}$ is the 62 x 62 regionalised Leontief inverse matrix

Our standards and accreditations

Ipsos' standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a "right first time" approach throughout our organisation.

ISO 20252

This is the international specific standard for market, opinion and social research, including insights and data analytics. Ipsos UK was the first company in the world to gain this accreditation.

Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos UK endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation & we were the first company to sign our organisation up to the requirements & self-regulation of the MRS Code; more than 350 companies have followed our lead.

ISO 9001

International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.

ISO 27001

International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos UK was the first research company in the UK to be awarded this in August 2008.

The UK General Data Protection Regulation (UK GDPR) and the UK Data Protection Act 2018 (DPA)

Ipsos UK is required to comply with the UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA). These cover the processing of personal data and the protection of privacy.

HMG Cyber Essentials

Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet. This is a government-backed, key deliverable of the UK's National Cyber Security Programme. Ipsos UK was assessed and validated for certification in 2016.

Fair Data

Ipsos UK is signed up as a "Fair Data" company by agreeing to adhere to twelve core principles. The principles support and complement other standards such as ISOs, and the requirements of data protection legislation. .

For more information

3 Thomas More Square
London
E1W 1YW

t: +44 (0)20 3059 5000

www.ipsos.com/en-uk
http://twitter.com/IpsosUK

About Ipsos Public Affairs

Ipsos Public Affairs works closely with national governments, local public services and the not-for-profit sector. Its c.200 research staff focus on public service and policy issues. Each has expertise in a particular part of the public sector, ensuring we have a detailed understanding of specific sectors and policy challenges. Combined with our methods and communications expertise, this helps ensure that our research makes a difference for decision makers and communities.