Youth culture and nightlife in Bristol

A Discussion Paper

Dr Paul Chatterton

Dr Robert Hollands

Ms Meg Aubrey

Centre for Urban and Regional Development Studies

and

Department of Sociology and Social Policy

University of Newcastle upon Tyne

NE1 7RU

UK

In 1982 there were pubs and a smattering of (God help us) cocktail bars. The middle-aged middle classes drank in wine bars. By 1992 there were theme pubs and theme bars, many of them dumping their old traditional names in favour of 'humorous' names like The Slug and Lettuce, The Spaceman and Chips or the Pestilence and Sausages (actually we've made the last two up). In 2001 we have a fair few pubs left, but the big news is bars, bright, shiny chic places which are designed to appeal to women rather more than blokes with swelling guts. In 1982 they shut in the afternoons and at 11pm weekdays and 10.30pm Sundays. In 2001 most drinking places open all day and many late into the night as well. In 1982 we had Whiteladies Road and in 2001 we have The Strip

(Eugene Byrne, *Venue Magazine* July, 2001 p23).

Bristol has suddenly become this cosmopolitan Paris of the South West. That is the aspiration of the council anyhow. For years it was a very boring provincial city to live in and that's why the music that's come out of it is so exciting. Cos it's the product of people doing it for themselves. That's a real punk-rock ethic.

(Ian, music goer, Bristol).

Preface

This document is based upon research undertaken as part of an Economic and Social Research Council funded research project looking at night-life and youth culture in three English cities – Newcastle, Leeds and Bristol. This project examines change in two, interconnected, areas. Firstly, we are concerned with the changing identities and experiences of young people. In particular, 'growing up' in many Western countries has been significantly extended due to dissatisfaction or exclusion from the labour market, increased participation rates in further and higher education, lower marriage rates and greater dependency on the family household. This extended adolescence has fuelled an array of youthful consumption lifestyles and identities beyond those traditional identified as 'youth'.

Secondly, we are concerned with the dramatic and forceful transformations of cities from images of decay, crime and dereliction in the 1970s and 1980s, to more vibrant, yet still problematic, places to live, work and be entertained into the twenty first century. A distinctive part of this 'return to the centre' involves the promotion of the 'cultural economy', in which city centres have become leisure and entertainment hubs. Within this, it is now accepted that night-life activity (defined here as licensed premises - pubs, bars, clubs, music venues) is an important economic sector in its own right. Our concerns, then, are changes in city centre nightlife activity and the way in which young people shape their identity within such spaces.

This research takes a critical look at several issues. First, while one might initially be quick to applaud the development of urban nightlife, especially as a tool for regeneration, crucial elements concerning cities and young people are being overlooked in the hubbub of self-congratulation and civic boosterism. In particular, promoters of urban nightlife often say very little about who owns the night-time economy and that corporate 'merchants of leisure' are dominating and transforming city centre nightlife at the expense of smaller, local independent operators. This has a number of implications for individuality, identity, creativity and locally embedded economic development. Second, most of Britain's core cities are pursuing a rather formulaic, 'entertainment' led approach to developing the night-time economy, which begs the questions for whom and in whose interests?

While many of our cities show elements of both the continental European model of more inclusive and diverse nightlife activity and the more corporate-led and divisive model prevalent in many US cities, current trends suggest that the latter model is increasingly widespread in UK city centres as they become ghettos for high value added entertainment and leisure activities with alternative, smaller scale and locally embedded activities undermined or pushed to the fringe. National corporate operators, then, are playing a disproportionate role in shaping nightlife activity, especially through the leverage they can apply on cash strapped urban authorities.

Our work is structured around three main sections to develop an understanding of young people's use of nightlife spaces in Bristol. First, we look at the **production** of nightlife through changes within the nightlife sector such as mergers, concentration, branding and theming and the different roles and strategies of national, regional/local and independent nightlife operators. Second, we examine the **regulation** and planning of nightlife through the role of the police, magistrates and the local state. Finally, we look at the **consumption** of nightlife spaces by exploring young adults' own 'lived experience' of Bristol.

This document is a summary of findings from fieldwork undertaken in Bristol between July 2000 and July 2001 which comprised focus groups with consumers of nightlife and one to one interviews with venue owners/ managers, promoters and DJs, police, licensing magistrates, authority representatives and various other people involved in the nightlife industry. We hope that the research has adequately captured some of the 'voices' and experiences of all the different participants in the night-time economy, and that this document can begin the process of creating a dialogue and debate about the future direction of this important element of urban life.

A website with information about the wider project is located at: www.ncl.ac.uk/youthnightlife. Further copies of this summary, a longer 100 page report and associated figures and maps can be downloaded from there.

Summary of report findings

Bristol in context. Sleepy City or Nightlife mecca

As one of Britain's 'sunbelt cities', Bristol has enjoyed relative economic prosperity with above average incomes and one of the lowest unemployment levels in the country, with youth employment opportunities remaining fairly high. At the same time the city has quite significant pockets of deprivation, which are often hidden from view outside of the affluent centre. The city centre has become a prosperous and vibrant place to live, work and consume over the last 10 years and the leisure industry and population have continued to grow side by side, with a significant rise in luxury waterfront accommodation. The challenge for the next few years is how the city will manage tensions between residential and entertainment uses and different groups of consumers in the city's nightlife

While the city was slow to adopt a policy of culture-led growth, by the 1990s Bristol followed many other British cities by developing an innovative cultural strategy, especially through key organisations such as the Bristol Cultural Development Partnership (BCDP). Bristol has developed several flagship public-private partnership projects such as Millennium Square and @Bristol which aim to increase the city's national and international reputation. It has also gained recent fame for its innovations in popular culture with Bristol appearing on the map within British youth culture as a mecca of ground-breaking, innovative music and vibrant clubs to compete with the likes of Manchester. Bristol owes much of its diversity and creativity to its multiethnic character which have added greatly to its music, cultural and arts scenes.

Due to the City Council's desire to see Bristol as a cosmopolitan, 24 hour European city and their liberal attitude to licensing, a vibrant late night economy has flourished since the mid 1990s. Bristol has been at the forefront of issuing 24-hour licenses to night clubs and extending drinking hours in pubs and bars. As a result, there has been a rapid increase in bars, themed pubs and branded café bars in the centre along with nightlife spaces outside the city centre such as 'the strip' in Clifton and Gloucester Road.

However, there are concerns that the city is facing saturation point due to the rapid growth of nightlife venues. Further, Bristol's approach to nightlife development has allowed unchecked growth and as a result, the nightlife and leisure market has become dominated by large scale corporate investments, especially around the city centre. The key issue, however, is how the city can balance growth of commercial nightlife with its strong alternative nightlife sector. In many ways, Bristol is an affluent city with high levels of urban prosperity, which can also be proud of its innovative home-grown, independent arts and music scene. However, it will have to confront the downside of gentrified development such as exclusion and marginalisation amongst less well off groups. Moreover, there are obvious growing discrepancies between the city centre and outlying areas.

Producing Bristol's Nightlife

Beer production and pub ownership have been subject to restructuring and concentration over the course of the 20th century. Since the 1989 Supply of Beer Orders Act monopoly ownership by brewers has been replaced by pub companies such as Normura and Punch (**table 1**). It continues to be a volatile period for the pub and bar market with 6,500 or 10% of the country's pubs up for sale at the beginning of 2001.

Nightlife is a significant national employer and sector of the economy. Yet, while the city centre pub, bar and club business is a lucrative one for certain companies and company directors, the Low Pay Commission (1998) has outlined the poor pay and conditions for many people in the hospitality sector.

The design of pubs, bars and clubs has changed drastically, especially through the explosion of themed, women friendly, mixed use environments. Branding nightlife has emerged as a core strategy for most operators, and has been extended from alcoholic products to whole outlets. 8% of all pubs in the UK (4,776 outlets) are now branded using one of 206 brands with the top 5 pub operators controlling 63% of branded pubs. The figure for city centres are generally much higher than this national average. Branding has attempted to reinforce niche consumer identities in the night time economy.

Nightlife provision in Bristol is characterised by the following:

- The city centre and adjacent areas have 108 pubs, 35 nightclubs with numerous licenses proposed. Provision is dispersed in several distinct consumption areas which represent a 'spoke and wheel pattern' and include the Centre, Harbourside and Corn St, Old Market, Whiteladies Road, Gloucester Road and Stokes Croft. Over the last half century, ownership has largely deconcentrated away from a small number of large brewers, especially Courage, towards more diffuse ownership in which 'pubcos' and corporate operators compete with regional and independent companies (**figure 1 - also see web page**).

- Ownership of the night-time economy can be separated amongst 'national operators', 'local/regional operators' and 'independents'. In Bristol, ownership is dominated by national operators who own 63% of city centre pubs with local/regional operators owning 15% and independents owning 22% (**figure 2 - also see web page**).

- Branding is a significant feature of Bristol's nightlife, with 26% of city centre pubs and bars branded. Branding is set to increase further and future growth is likely to be driven by large chain concepts and superpubs with capacities of over 500 people.

- Bristol's nightlife is dominated by certain styles of venues. While traditional pubs are still the most numerous style of pub to be found in the city centre accounting for 34% of venues, café bars are rapidly catching up accounting for 30% of city centre venues. Pubs which followed a theme, account

for nearly 17% of venues and style bars account for 10% of venues. Alternative venues account for only 1% of venues in the city centre, with most squeezed out to peripheral and residential areas. Finally, Bristol has a small amount of older, ale houses at 6% of venues (**figure 3 - also see web page**).

- The city centre and adjacent areas have a registered capacity for music and dancing of just over 35,000 (around 20,000 in 35 nightclubs and 15,000 across 45 pubs and bars with special hours 'post 11pm' certificates). The strength of the nightclub sector is its range and scope with an average club size of just over 500. Many of the venues further out provide an alternative focus for clubbing providing hip-hop, reggae and drum and bass to techno. A prominent feature of Bristol's nightlife is the blurring between pubs, bars and clubs. One-quarter of all city centre pubs and bars open post 11pm.

A number of **issues** stem from these findings. First, large corporate players play a dominant role in nightlife provision. One of the main characteristics of corporate, as opposed to locally operated nightlife venues, is a lack of local control in terms of design, employment and purchasing. This increase of nationally based larger scale corporate venues reflects a growing affluence of the city and the large increase in café and style bars mean that traditional pubs and alternative venues will struggle to survive in the increasingly high cost city centre.

Such large corporate pubs have close links with large corporate employers, often through special 'workplace deals'. Large corporate chain bars are also creating a one stop shop for nightlife, especially by creating a wider lifestyle brand combining food, dancing and drinking. However, bar managers of commercial properties suggested to us that they were under increasing pressure to achieve profit targets and in many cases this has led to compromising door standards to fill venues. While some people felt that chain bars improved the feel of the area and hence increased custom for adjacent businesses, others felt that the sameness of many chain bars allowed the independent sector to stand out more. Many alternative and independent venues attract a different clientele and operate in a very different manner, often relying on a much more personal and hands-on approach and are often less motivated by profit.

Second, Bristol has always had a strong local 'brand' based around the strength of its musical talent and local, independent, and publicly funded or subsidised nightlife venues have played a key role in local creativity - a fact which should be kept in mind by those aiming to promote a broad range of cultural activities in the city. Independents face a number of barriers such as rising property values, undercutting through bulk buying by corporate chains, and problems acquiring licenses etc. While Bristol seems to have struck a balance between its strong and creative local brand of nightlife and nationally run chain bars, evidence suggests that the latter may become the focus of development in the future.

Regulating Bristol's nightlife

Licensed premises are a significant part of the economy. Nationally, in 1998 there were over 110,000 on-licensed premises with several thousand currently planned and there has been a 30% increase in the last twenty years. The pub and club industry has a turnover of around £22 billion pounds, equal to around 3% of the national GDP. The whole notion of regulating night time activity is hotly contested. Historically, the night-time economy has been regarded as a site of excess, vice and crime and as a result has been subject to much legal, political and indeed moral regulation. More recently, nightlife activity is regarded as part of the mainstream economy and as a tool in urban regeneration.

The case for more regulation of nightlife activity has been made in the light of continuing concerns about increases in late night premises, excessive drinking, violence and crime, drug dealing and gangsterism, pressures on police resources, limits on services like transport, and complaints from residents regarding noise and vandalism. The current system of licensing is rather esoteric and cumbersome and few fundamental changes have been made to the basic legal approach that has stood for almost two centuries. However, the government White Paper on Reform: *A Time for Change* has proposed a radical shake up and simplification of the current licensing system in which local authorities play a central role in the granting of alcohol and public entertainment licenses.

In Bristol, the local authority, magistrates and police have embraced deregulation and growth in the night time economy and, as a result, in the last decade nightlife in Bristol's city centre has dramatically increased. The regulation of Bristol's nightlife comprises a number of players:

Licensing magistrates have traditionally played a key role in regulating nightlife activity. Their role is to maintain a delicate balance between (a) control and regulation and (b) allowing market forces to operate. The licensing magistrates seem to be in touch with the night life scene in Bristol and have adopted a relaxed and pragmatic approach to the issue of nightlife expansion and deregulation. A consequence of such a 'market-led' approach however, has been to favour large developers over smaller ones.

The police play a dual role in the night time economy: advising magistrates on the suitability of applicants and also policing nightlife activity. The Police have generally supported the promotion of the 24-hour city model in Bristol, welcoming staggered closing times and licensing liberalisation. There were concerns that further growth would put pressure on existing police resources. As a result, police were looking for alternative ways to police the city, especially through more professional door security, radio links, CCTV and surveillance equipment and multi-agency initiatives with the nightlife industry. In particular, they are keen to get pub companies and brewers to shoulder some responsibility, especially financially, for nightlife problems. While there are certain crime hotspots, especially around the centre, recent crime figures are fairly stable.

Nightlife security has emerged as a major employment sector over the last two decades. The media hype of the *Muscle* documentary does not quite live up the day to day reality of door security in Bristol, which is increasingly well organised, especially due to the introduction of a door registration scheme in 1992 to regulate the 1385 door staff in the city. Initiatives such as ClubSafe have also increased safety in the city centre. In some of the larger competitive venues there is increasingly a conflict of interest between the need to fill the venue to maximise profits and the need to regulate access for reasons of safety. Moreover, the increase in bars and subsequent demand for more door staff has led to a decline in standards in the operation of many doors.

Local authorities have complimented their functions of local welfare service providers with promoting local and urban economic development and inward investment. Since the mid-1990s, the City Council have been active in the promotion of Bristol as a 24-hour city in an attempt to attract major investment into the city and develop a cosmopolitan image. Nightlife, then has become a central part of the economic development strategy for the city centre. The City Council have pursued a very liberal approach to the granting of Public Entertainment Licenses and have largely responded to the workings of the free market rather than controlling development. This liberalisation of the night time economy has gone hand in hand with an increase in large corporate operators.

Cultural intermediaries such as promotional agencies, listings magazines and advocacy groups play an important role in developing Bristol's nightlife. The city has a number of listings magazines such as the well established Venue Magazine which has been actively promoting the campaign for 24 hour licensing for years. Others include Adhoc, This is Bristol, What's on Bristol, Synergy, and The Fly, many of which are aimed at specialist music and nightlife communities. Bristol Community Development Partnership has also played a major role in the pursuit of a cultural vision for the city.

Residents in Bristol have experienced development of nightlife in residential areas leading to various actions by them. The 'strip' along Whiteladies Road in particular has provoked responses from two powerful local groups: Redland and Cotham Amenities Society and the Aberdeen Road Residents Association. Such groups have been successful in securing supplementary planning guidance for the area to restrict types of nightlife use.

Consumers Often the views of the consumers are not recognised or recorded, especially in terms of how nightlife should be designed. Many young people had concerns such as the need for safety improvements in the city, more police presence, increased street lighting, improved public transport and the problem of segregation between different parts of the city. Moreover, they felt the city centre had only been developed for tourists, rather than local people.

There are a number of **issues** in terms of the future regulation of the city's nightlife. First, it is clear that

Bristol has been at the forefront of developing a 24-hour night time economy which was built on the belief that staggering hours would lead to a reduction in crime. While some improvements have been made, drunken and disruptive behaviour is still widespread, especially around the Centre.

Second, as consumers have become accustomed to later opening hours in the city, their demands for further extensions has increased and for the foreseeable future, traditional pubs are being forced to transform themselves into more fashionable places to attract a new crowd of late night consumers. One awaits whether the power of issuing licenses will fall into the hands of local government and opinion is divided as to whether this is the best move. Particular concerns involve perceptions of conflicts of interests from the local authority as landowner and legislator.

Third, Bristol has a particular historic problem with zoning, which is being reinforced through the emergence of nightlife hotspots such as the Harbourside. The increase in the city centre population, to around 11,000 many of which are young people and university students, could overcome such zoning issues. However, the population increase is likely to increase conflicts between leisure and residential use.

A fourth key issue is that the police quite rightly are beginning to recognise that nightlife operators have an obligation to help maintain order in the city. Part of the problem is that the raison d'etre of large corporate leisure companies is profit rather than social cohesion. While there is a recognition of a need for a changing philosophy of city centre nightlife and the development of a more cosmopolitan feel and a move away from a focus on alcohol consumption, there is less awareness of how to achieve this. The private funding of police by nightlife operators, while solving the problems of drunken violence in the short term by increasing the number of officers, will still not tackle key issues such as the lack of a diverse range of nightlife activities and a dominance of alcohol drinking.

Fifth, there is a growing consensus that Bristol has reached saturation point, especially through the growth of super-pubs and clubs. The city has reached a point where it is seeing who can survive in this hyper-competitive market, and it seems that the independent market is the most likely to suffer.

Sixth, the Bristol approach to nightlife has been founded on partnership, with little evidence of hostility between different regulators. Recently there has also been a clear shift towards getting the leisure industry on-board as well, especially through attempts to control drunkenness and crime. It is worth bearing in mind the disadvantages placed on smaller entrepreneurs in such a competitive market and the fact that consumers views are rarely part of this partnership approach.

Finally, a future priority is to balance corporate growth with the need to protect creativity. In particular, the Council is sensible in its efforts to discourage the 'drink, kebab and fight' mentality and encourage late night venues other than pubs, clubs and bars.

Consuming Bristol's Nightlife

A number of wider social trends and changes are affecting the lives of young people and their night life activities: 'youthful' behaviour extends beyond that of a teenager in a period of 'post-adolescent'; young people are seeking to redress the balance between work and play; as the population ages, young people will constitute a smaller proportion of the total population than in the past; and many young people continue to face social and economic problems such as unemployment and low wages. Second, visiting pubs, bars and clubs is a core element of young people's lifestyles, but the experience of going out to these places has changed drastically over the last decade largely through the advent of 'clubbing', dance music and late-night, hybrid bar-clubs. Finally, the role of drinking alcohol has changed in society from a community-based to a lifestyle activity. While the range of alcohol products has grown immensely and drinking has become more women friendly, over 70% of beer sales in the UK is now dominated by 3 brewers. 18-24 year olds are now the heaviest drinkers in the population.

Bristol has a variety of nightlife centres, each with their own tempos, clientele and atmospheres. In particular, it is also characterised by a strong 'eating out' culture and clubbing scene. The following trends can be observed:

Mainstream Nightlife is to be found along the boisterous Centre, Harbourside and Corn Street areas characterised by large scale, alcohol-oriented chain pubs and bars, many of which offer all-evening entertainment packages through food, drink and entertainment. Such areas provide fun, commercially oriented chart music and a hedonistic atmosphere for people who want to have a good time. Consumers here were described as 'townies' characterised by their dress styles, musical preferences and traditional motivations for a night out such as sexual encounters and high levels of alcohol consumption. Mainstream nightlife continues to play an important role in the city's culture and economy as people seek a place of release and fun from the stressful world of work, yet it remains out of step with attempts to create amore 'cosmopolitan' city.

Style Nightlife Bristol, more than many other cities, has witnessed a style revolution in its nightlife, especially around Whiteladies Road. There is also a growing market of exclusive, often London based, style bars in the city centre which cater for professional service workers. While such venues can be highly designed, innovative and creative, it should be recognised that they are also expensive and exclusive and do little to encourage social cohesion or wider participation.

Alternative Nightlife caters for particular identity or subcultural and music groups such as gay and ethnic groups and is typically found on the fringe of the city centre. Over the last decade, such venues have been squeezed further out of the city centre or have closed altogether due to increasing property costs and the changing priorities of pub operators and brewers. Distinctive alternative nightlife venues in Bristol

include places like Arc in the city centre, various venues in the Stokes Croft area and Easton and New Trinity Community Centres.

Suburban Nightlife and neighbourhood drinking is a strong element of Bristol's nightlife. It has grown further in recent years as the city centre has become saturated and entrepreneurs search for new profit areas, cheaper venues and less restrictive licensing. Whiteladies Road has emerged as a more 'up-market', 'classy' night life destination to rival city centre nightlife, characterised by young professionals, affluent students and hotel residents. However, the residential nature of the area has created a number of conflicts of use. Gloucester Road is also emerging as a distinctive nightlife area.

Student Nightlife The 40,000 students leave a significant imprint on the city, with an annual spending power of over £203M, with nearly £50M on entertainment alone. Unlike other cities, the Student Unions do not play a significant role as entertainment providers. Much student nightlife is focused around suburban areas, especially Whiteladies Road and Gloucester Road. There are mixed feelings about the relationship between students and locals, with wealthier Clifton students often being identified as a group who stand out. Many students also increasingly stay and settle in Bristol, in part due to the strength of the regional economic base, but also because of the strong and varied cultural infrastructure. As a result, there is often a greater blurring of students and locals due to the growing number of young consumers generally in the city.

Gay Nightlife Attempts have been made to encourage the development of a gay consumption area around Old Market, due to the presence of a number of key gay oriented venues. However, many gay people felt uncomfortable being squeezed out of the city centre into the rather down at heel margins of the city centre. The Old Market is developing into a new nightlife area and the Council is actively supporting the move to encourage gay businesses into the area. Clearly, there needs to be an awareness that the emergence of a gay village relies on more than just the support of the City Council. Moreover, City Council intervention can often have the opposite effect: marketing can raise hope values, and then property values and thus squeeze out local entrepreneurs who could develop the scene. The city also has several thriving gay venues in the centre of town and the style revolution is likely to increase the gay friendliness of the city centre. However, tensions may emerge as such places sit cheek by jowl with more mainstream venues.

Clubbing nightlife There are a variety of clubbing experience in Bristol. First, corporate clubbing and super clubs have emerged in Bristol. While these have put Bristol on the map, it was felt that many of these were overpriced and offered the same product. Second, Bristol has a strong independent clubbing infrastructure based around several key venues, artists and record labels. Over the last decade, some parts of this infrastructure have been squeezed out of the city centre due to increasing property costs, and the changing priorities of pub operators and brewers, especially branding. Third, one of Bristol's strong

characteristics is its alternative nightlife, clubbing and music scenes based around Stokes Croft, St Paul's and Easton, However, parts of these areas suffer from negative perceptions associated with crime. Gentrification of parts of these areas continue to take away their 'alternative vibe'. Finally, there is a large free party scene in the city and the region more widely, which promotes nightlife within a different set of regulations.

Residual Nightlife takes the form of working class, local, community pubs, or ale houses within the city centre, often near markets, which are largely set to disappear due to various urban regeneration schemes and changing corporate priorities of their owners (including selling off stock).

Several **issues** stem from this overview of the consumer experience of Bristol's nightlife. First, Bristol has always had a strong eating and restaurant culture and this is now merging with pubs and bars and as a result, café bar culture based around eating and drinking has boomed in the city. Much of this is related to the growing prosperity amongst professional service classes who are increasingly using city centres as places of work, play and entertainment. However, there is also evidence of a backlash against the trendier, stylish bars and branded, chain outlets in favour of more traditional, community pubs.

Second, Bristol's identity is faced with conflicting images of rurality and urbanity. While some perceive the city as a backward semi-rural town, others see it as a cool trendy city with a thriving nightlife and a unbeatable alternative and festival scene. Historically, it is not a place generally used to selling itself, but the city remains quietly confident with its understated nature part of its charm. London businesses are rapidly tapping into the Bristol market and realising the opportunities for new nightlife ventures. One of the distinctive elements of Bristol's identity is its multi-racial nature, which contributes greatly to the city's nightlife.

Third, even though some people have stated dissatisfaction with Bristol's nightlife in comparison to other cities, there does seem to be an over-riding feeling of satisfaction. There is also recognition of a changing customer base towards more female-friendly and less drink-orientated venues. However, one common complaint about Bristol's nightlife concerns the price of 'going out' and the general growing affluence of city centre consumers. In spite of the city's obvious strengths in musical creativity, it has long been stated that Bristol suffers from the lack of a decent large live music venue, which marginalises it on the national circuits of large bands. However, the role such a venue would have in fostering local cultural creativity is unclear. Moreover, in spite of the late night licences, there are still few places which offer a more 'sober environment', without alcohol and loud music.

Fourth, one apparent contrast in Bristol is between those predominantly interested in having fun and being out with their mates and those who are in pursuit of a cool, stylish atmosphere and specialist music. In particular, many young people employed in the city centre's service sector are going to late drinking

venues to have fun and relax from the stresses of work, especially with friends and work colleagues. While this is nothing new, it is a source of concern as many young people are going out to get excessively drunk, rather than engage with a range of creative activities. While having fun, hedonism and drunkenness has long been a motivation for a night out, we have to be aware that new stylish chain bars are more geared towards profit and encouraging alcohol sales, and do little to offer opportunities for creativity and dialogue.

Fifth, Bristol's nightlife remains heavily zoned with each area having its own set of codes, aspirations, door policies, prices and entry requirements. The growth of nightlife is increasing these divides which is being enhanced by the strategies of corporate firms, eager to attract cash rich groups at the expense of creating more accessible nightlife cultures, for example, those aimed at families. Many of the bars in the central area are becoming prohibitively expensive for certain groups of young people and the new wave of style bars are particularly expensive and exclusionary. It is these elements of Bristol's nightlife that are the seedbeds for increased polarisation between the rich and poor.

Conclusions. Future nightlife scenarios

Whatever city one looks at in the UK, there seems to be a certain air of inevitability about the way in which its nightlife will develop. However, there are a number of different choices and ways forward, each of which have different policy implications for nightlife entrepreneurs, the local state and consumers.

First, Bristol could simply become 'Anywheres ville UK' and continue to accommodate and embrace the global corporate world hoping that they can become its 'flavour of the month' with big nightlife brands such as Brannigans, Parisa and Rock. This very much appears to be the current trend. It can continue to bend over backwards trying to attract major pubcos ignoring regional and local operators. As such, smaller, locally owned nightlife spaces will continue to be squeezed and marginalised, and the city will continue to lose its uniquely alternative flavour, and there will be little local infrastructure to build on. With the high levels of prosperity in Bristol, the city centre will continue to become a very attractive place for investment by large scale investors.

Balancing the global, national and the local is probably a more likely scenario. This would involve the City Council working together with all interested parties in the night-time economy, and not allowing sectional interests and the profit motive to solely influence the types of nightlife growth. In such a context, there is a need for the local authority to play a stronger role in the development of the night-time economy especially to strike a balance between commercial and local need, and the interests of corporate capital and users of the city, whoever they may be.

Alternatively, the city council, other regulators and venues owners could be more radical in their orientation and could begin to actively promote local nightlife cultures, emphasising diversity, creativity and social cohesion. To encourage this model, mechanisms would need to be established to favour certain types of nightlife activity, encourage many more opportunities for local entrepreneurs and massage property markets in their favour. This would need a significant change in values and philosophies based around a more inclusive urban realm, encouraging the intermingling of different age groups and mixed night-time activities in which alcohol consumption, on its own, played a much smaller role. The overall strength of Bristol's nightlife remains its diversity of provision and strong local cultural scene. Which way the city ultimately chooses, then, is still very much up for grabs.

Table 1. Pub ownership in the UK

	Outlets	Managed	Leased/Tenanted
Punch/Wellington	5878	1060	4818
Nomura**	4839	28	4821
Whitbread PLC	3714	1990	1724
Bass	3046	3046	-
S & N*	3300	2330	1000
Enterprise Inns	2437	-	2437
Pubmaster Ltd	2050	-	2050
Wolv & Dudley*	1993	997	996
Greene King*	1730	630	1100
Alehouse Prop.	830	50	780

Total for top 10   **29,817 (48% of all pubs in the UK)**

* Brewer
** This figure does not include the recent acquisition of 988 Bass pubs.

Punch includes Punch Taverns, Punch Retail, Inn Business, Vanguard, Wellington
Normura includes Unique, Inntrepreneur, Phoenix, Inn Partnership, Wizard Inns