

The London of the North?

Youth cultures, urban change and nightlife in Leeds

A Discussion Paper

Robert Hollands

Paul Chatterton

Cait Read

Bernie C. Byrnes

Department of Sociology and Social Policy

Centre for Urban and Regional Development Studies

University of Newcastle upon Tyne

University of Newcastle upon Tyne

NE1 7RU

NE1 7RU

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UK

After years of being saddled with the image of flat caps and Tetley Bitter men, Renaissance Leeds has been largely modelled on continental 24-hour cities... groups of chic revellers throng in the streets, Leeds is the only place to be

(The Independent, June 1999)

I just think in Leeds it is a fine line between... dirty nasty places and really trendy dressy places. Like on a Friday and Saturday night, it is hard to find middle ground

(Julie, young professional, Sept 2001)

I saw the writing on the wall a long time ago and sort of said you know the corporates are just going to kill it all... what horrified me was their influence on the way cities operate and that influence is still totally endemic.

(Independent Bar Owner, Sept 2001)

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 Leeds. 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 Leeds.

This document is a summary of findings from fieldwork undertaken in Leeds 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

Leeds in context. Growth and change in the corporate city

Essential to understanding the history of Leeds are the dramatic economic changes over the last two decades. Leeds' economic past has been mixed but generally buoyant. Despite losses in manufacturing, Leeds still remains the UK's fourth largest manufacturing centre and since the 1970s the growth in service industries has compensated for the loss of manufacturing jobs. Leeds now has a reputation as a leading financial and legal centre and has become Britain's third financial centre after London and Edinburgh. Leeds, then, has managed to weather the decline of manufacturing to become a vibrant regional capital based upon service employment growth and as a European tourist and business location.

More than many other old industrial cities, the city's marketers have been effective in giving Leeds a make-over, much of which relies on tourism and the quality of its nightlife. Leeds is now considered by both the travel industry and the general public, as an attractive tourist and leisure destination and has developed a strong European,-style café society. Higher education and high levels of graduate retention play a key role in Leeds' economic and cultural fortunes. 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. Leeds' nightlife has become renowned. Over the last 10 years, the City Council have consciously pursued a strategy to develop Leeds as a cosmopolitan, 24 hour European city and their liberal attitude to licensing has allowed a large and vibrant late night economy to flourish since the mid 1990s. Led by independent operators, the city centre has transformed itself away from a small number of pubs and bars many in need of refurbishment, to become one of the most lively, cosmopolitan and progressive late night entertainment areas in the country. However, there are concerns that the city is facing saturation point due to the rapid growth of nightlife venues. Further, due to largely unchecked growth, the central nightlife and leisure market has become dominated by large scale corporate investments. The key future issue is balancing growth of commercial with independent nightlife.

There is, however, another side to this story of prosperity, especially in the areas surrounding the city centre. Many citizens of Leeds have not participated in these rapid changes. One third of wards in Leeds are within the worst 10% of wards nationally. The segmented nature of the labour and entertainment market has resulted in a 'two speed city', where groups, mainly in the outer areas, are relegated to either unemployment or low level positions in the labour market and are in general non-participants in the city's vibrant nightlife. Statistics show consistently that the majority of city residents are not receiving the full benefits of Leeds' burgeoning success. Because of this, perhaps the 'classic corporate approach' to development needs rethinking if it wants to increase inclusivity and access for all residents.

Producing Leeds' 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 Leeds is characterised by the following:

- Leeds has a dense network of licensed premises in its city centre which form a loose ring around the core central shopping centre, which is mainly devoid of licensed premises. In May 2001 the city centre included 121 pubs and bars and 18 nightclubs. Between 1994 and 2001, licensed premises increased by 53% and special hours certificates (post 11pm) increased by 155%. There are currently 30 proposed licenses at Clarence Dock, 7 at Granary Wharf, 9 at Brewer's Wharf and 9 at the Light. Over the last half century, ownership has moved away from local and regional based brewers, especially Joshua Tetley, towards a more diffuse pattern of ownership in which large 'pubcos' and corporate operators vie with smaller 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 Leeds, ownership is dominated by national operators who own 65% of city centre pubs with local/regional operators owning 4% and independents strongly represented owning 31% (**figure 2 - also see web page**).
- Branding is a significant feature of Leeds' nightlife, with 31% of city centre pubs and bars branded. Recent growth has been dominated by large chain concepts and superpubs with capacities of over 500 people.
- Leeds' 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 36% of venues, café bars are

rapidly catching up accounting for 29% of city centre venues. Pubs which followed a theme, account for nearly 12% of venues and style bars account for 10% of venues. Alternative venues account for only 4% of venues in the city centre, with most squeezed out to peripheral and residential areas. Finally, Leeds has a small amount of older, ale houses at 7% of venues (**figure 3 - also see web page**). A distinctive feature of Leeds' bars are that many are multi-use, chameleon-like, lifestyle venues usually offering food, music and drinking past 11pm, and as a result difficult to classify.

- The city centre and adjacent areas have a registered capacity for music and dancing of over 48,000 (around 23,000 in 23 nightclubs and 25,000 across 57 pubs and bars with special hours 'post 11pm' certificates). Leeds, then, has a larger post 11pm capacity in its bars than in its night clubs. A notable feature is the large size of many venues with nearly 20 venues approaching capacities of 1,000. A significant difference has emerged between larger, commercial venues and smaller, artistic venues, which often attract a loyal following.
- A further feature of Leeds' nightlife is the blurring between pubs, bars and clubs. Leeds has a strong post 11pm culture. Around one-third of all city centre pubs and bars open post 11pm.

Regulating Leeds' 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 Leeds, 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 venues in the city centre has dramatically increased. The regulation of Leeds' 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. With the recent explosion of city centre bars it is difficult for magistrates to keep in touch with developments. Nevertheless, they have adopted a relaxed and pragmatic approach to the issue of nightlife expansion and deregulation and since the 1990s, have not refused liquor licenses on the grounds of sufficient demand, trade protection, or to reduce unfair competition. A consequence of such a 'market-led' approach however, has been stronger growth of large developers compared to 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. Although initially concerned about the pace of growth, the Police have generally supported the promotion of the 24-hour city model in Leeds and now regard staggered closing times and licensing liberalisation as ways to effectively use police resources. Concerns that further growth would put pressure on existing police resources have resulted in the police developing 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, there is

an awareness that pub companies and brewers should 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. Door security in Leeds is increasingly well organised and professionalised, especially due to the introduction of a door registration scheme in the early 1990s. Many door staff felt that the scheme did not ensure high enough standards. Door security is provided by a small number of door security firms. Differences in approach have emerged between Leeds' smaller more specialist venues who employ 'style selectors' and the city's larger more mainstream venues who still often employ traditional 'strong arm' bouncers. In general, however, door cultures in Leeds have relaxed and have moved away from strict style and dress criteria. Such professionalisation of door staff reflects the wider upgrading of nightlife in Leeds city centre.

Local authorities have complimented their functions of local welfare service providers with promoting local and urban economic development and inward investment. For several decades, Leeds city centre was rundown and nightlife was not regarded as a central part of economic regeneration. Since the early 1990s, the City Council has been active in the promotion of the 24-hour city concept in an attempt to attract major investment into the city and develop a cosmopolitan image. Nightlife, subsequently has become a central part of the economic development strategy for the city centre. The 24 Hour Initiative and the City Centre Management Team has played a key role in this animation of the city centre. The City Council has liberalised the granting of Public Entertainment Licenses pursuing a largely free market rather than restrictive approach to development. This liberalisation of the night time economy has gone hand in hand with an increase in large corporate operators, and to a certain extent, has neglected the importance of non-commercial activity.

Residents As the population of Leeds city centre continues to grow, conflicts between residents and revellers will emerge. Many nightlife venues have had to scale down the level, and lateness, of their activities due to the building of adjacent residential and hotel developments. However, problems are likely to be kept to a minimum due to the zoned nature of the city centre and the development of out of town entertainment complexes. New residents in the city centre are often self-selecting who are often more accepting of late night activity and to date there are few active resident associations in the centre.

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, some felt the city centre had only been developed for cash-rich tourists, rather than young local people.

Consuming Leeds' 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.

Leeds has a variety of types of nightlife, each with their own tempos, clientele and atmospheres. The post 11pm and clubbing scene is particularly strong. The following trends can be observed:

Mainstream Nightlife Although Leeds is not well known for circuit drinking, the boisterous Boar Lane/City Square Centre area is emerging as such an area characterised by large scale, alcohol-oriented chain and theme pubs and bars. 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 gender roles 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 a more diverse 'cosmopolitan' city.

Style Nightlife Leeds has witnessed a style revolution in its nightlife, led mainly by small independent bars. These places do not enforce a dress code and are often 'stylishly scruffy'. Stylish venues have clustered around the Corn Exchange but have also moved further out to the North Quarter to distance itself from the encroaching mainstream. In many ways, such stylish nightlife sits uncomfortably with a city still close to its industrial roots.

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. Leeds has a strong alternative scene based around Goths, skaters and a strong underground clubbing scene. However, over the last decade, such groups 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.

Suburban Nightlife Several suburban areas in Leeds have become significant nightlife destinations. One of the main ones, Headingley, which due to the large presence of university students and young professionals has experienced the rapid expansion of pubs and bars. The established community and suburban atmosphere of the area has been severely undermined by the influx of temporary populations. Problems such as landlord absenteeism, falling house prices and amenity value, crime, noise and litter have become the focus of a well orchestrated campaign to maintain the character of the area and to stop the displacement of local residents.

Student Nightlife The 65,000 students leave a significant imprint on the city, representing an annual spending power of over £330M, with nearly £77M spent on entertainment alone. Much student nightlife is focused around the suburban areas of Headingley and Hyde Park. A number of well established student pubs, along with the two students unions and some recent additions, means that a well developed student nightlife infrastructure exists outside the city centre. The Otley run pub crawl is immortalised in Leeds student life. Students are also high users of city centre nightlife during quieter mid week periods. Most large nightlife operators now run student only nights in the city centre. Tensions between students and locals do exist, especially in the Headingley area. Yet, the growing amount of students, graduates and young professionals in Leeds has gone some way towards reducing tensions and blurring student-local distinctions.

Gay Nightlife Although Leeds does not have a gay quarter to rival Canal Street in Manchester, the Calls area has long acted as a focal point for the gay scene. This area has a mixture of traditional gay pubs and ultra-stylish new venues aimed at a mixed audience, which have been at the forefront of Leeds style revolution. SpeedQueen has also given Leeds a national reputation for pioneering mixed venues. While Leeds' gay scene has become much safer and Leeds city centre has become a more accepting place, tensions are evident as the Calls sits cheek by jowl with more mainstream venues along Boar Lane and the Market area.

After Hours Nightlife Leeds has a reputation as a place where you can continue partying after the traditional pub and nightclub closing times. As well as the wealth of pubs and bars opening until 2am, there are four clubs opening until 4am or 6am and a few all night coffee shops. Clearly, those able and willing to continue dancing until 8 or 10 am implies that this clientele come from the more drug and dance music oriented cultures than the mainstream, 'drink and pull' scene. There is no evidence of increased problems associated with such late night activity.

Residual Nightlife Working class, local, community pubs, or ale houses within the city centre form a declining and 'residual' aspect of nightlife. There are several such pubs near the market area. Considering the continuing gentrification and upgrading of entertainment, retail and nightlife in Leeds, question marks

hang over such pubs. The changing corporate priorities of their owners (including selling off stock) may also speed their demise.

Issues in Leeds' nightlife

Independent Bars and Corporate Chains Local entrepreneurs have been pivotal in encouraging growth in the night time economy within the city. However, their success has also attracted the interest of national corporate chains who want a slice of the action (and profits) and are able to pay higher rents for properties. Over the last few years, the magistrates and the City Council have allowed the unchecked development of large sites into bars by corporate companies. Larger corporate players have seen the potential of the Leeds night time market. This increase of nationally based larger scale corporate venues reflects the growth of service sector employment in the city centre.

The night time economy, then, has become an extremely competitive market and has encouraged a number of sectors to vocalise their interests and lobby for greater recognition. The Leeds Café Bar Association, the Exchange Quarter and ClubWatch are examples of this. 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. Leeds' former reputation for independent, unique nightlife venues is likely to be eroded in this hyper-competitive market. Independents now face a number of barriers such as rising property values, undercutting through bulk buying by corporate chains, and problems acquiring licenses.

Leeds' nightlife is increasingly being polarised between an area characterised by smaller, independent, mixed use venues east of Briggate and an area characterised by larger, corporate owned, alcohol-oriented venues west of Briggate. Future growth of nightlife may be oriented more towards the latter around 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.

The Future of Ownership in Leeds Several independent bar owners have been bought out by larger chains, while others have remained to pursue their projects, often on the edge of town to escape the 'corporate feel' of the centre. One significant issue for the future concerns market saturation, especially in the light of several notable bar closures. In many ways, increased competition is creating a downward pressure on prices, and in terms of style and content is encouraging a 'race to the bottom' and a lowering of standards

For the future, Leeds' nightlife will continue to walk a precarious balance between independent and corporate activity. Close attention, from the police, magistrates and the council, is needed to ensure that

corporate brands do not become too dominant and erode the strong reputation which Leeds has built up in terms of a vibrant and diverse independent bar scene. However, in many places such as the Calls which has experienced significant corporate investment, this may already be too late.

Licensing and Beyond Leeds 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 in the centre. 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. Above and beyond policing resources, key issues remain the lack of a diverse range of nightlife activities and a dominance of alcohol drinking.

There are several ways in which the regulation of licensing can develop. Those granting licenses are sensitive to the variety of licensing needs in the city centre and that one size does not fit all. Other suggestions have included staggered and 24 hour opening, or closing at the discretion of management, or enabling licensees to keep their license when they move to other venues, the so-called 'driving license scenario'. Simplification of the numerous licenses available may prove beneficial and the Government White Paper has proposed a radical reform of licensing, with the power to grant licenses vested in a single institution, potentially the City Council.

Delegating to the council, may leave police and magistrates to attend to other matters, but this will greatly increase the Council's workload and absorb more of their resources. Particular concerns also involve perceptions of conflicts of interests from the local authority as landowner and legislator. The number and type of licenses may be simplified, allowing much flexibility, so that venues can adjust the provision of their facilities quickly, in response to day-to-day demands. The needs of residents and businesses, which are not part of the night-time economy, must be kept firmly in mind and they will presumably express their opinions and grievances through various associations, as problems related to later nightlife become more acute.

Leeds: late night and laid back One of the key insignias of modern day Leeds has been the extension of activity well after the traditional '5pm flight'. The expansion of nightlife has also expanded opportunities for other retail activities. Leeds, then, more than many other old industrial cities, has extended activity well into the night. However, key parts of the late night infrastructure need addressing to ensure that there is a variety of activities late into the night and not just those associated with alcohol, dancing and drugs.

Growth in Leeds has largely benefited from cross sector support including the police, local authority, magistrates and existing businesses. Leeds, then, has taken a progressive and laid back approach to the development of the night time economy. For the future, those implementing regulatory laws should pay

attention to the 'type' rather than just the 'amount' of new activity to ensure that a balance is struck between a range of activities rather than an alcohol monoculture driven by large non-local corporate developers.

Venice of the North in Little London? To what extent does Leeds stand out from other neighbouring industrial cities. Has it really thrown off its old hard, smoke stack image and replaced it with a new chic culture? Major changes in going-out culture have happened over the last 10 years in Leeds. The handful of rough pubs and clubs have been replaced by countless new style bars and larger branded corporate pubs which are more female-friendly and less drink-orientated venues.

No doubt in response to these changes, the night time clientele have adapted their tastes and preferences and a host of new, younger and wealthy revellers have been attracted to Leeds from a wide regional catchment, and indeed the country. Leeds, then, feels very different at night than 10 years ago, if only that tens of thousands more people use the city centre. However Leeds is not a little London, Venice or Soho. The rich and famous in Leeds often prefer something a bit more true to Yorkshire. Mainstream drinking cultures remain strong and are expanding. Further, one common complaint about Leeds' nightlife concerns the price of 'going out' and the general growing affluence of city centre consumers. In spite of the late night licences, there are also still few places which offer a more 'sober environment', without alcohol and loud music.

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, it has to be noted that new stylish chain bars are more geared towards profit and encouraging alcohol sales, and do little to offer opportunities for creativity and dialogue.

A rising tide lifts all boats? It is important to keep in mind that not everyone has been caught by the rising tide of Leeds' growing economy and cultural infrastructure. While some opportunities have opened up in terms of low paid service work in call centres and the hospitality industry, many of the people in the outlying estates and inner city areas have been left behind by much of the development in this 'corporate city'. In particular, the new breed of style bars simply out-prices or out-classes many people from the city centre. In many ways, then, the city centre is becoming a ghetto for cash-rich groups, such as townies, students or young professionals. The City Council needs to look hard at the types of provision available in the city centre outside simple alcohol consumption. In particular, the needs of under 18s, families, older people and those on low incomes are rarely catered for in the new glitzy world of branded café and style bars. These issues need urgent attention if comparisons with European cities are to have any substance.

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, Leeds 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, JD Wetherspoon or Luminar Leisure. 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 Leeds, 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 early strength of Leeds' independent venues has been a hallmark of the city's nightlife. The balance between this sector and the growing corporate sector is a key element in the future feel of the city's nightlife. Which way the city ultimately chooses, then, is still 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)		
<p>* Brewer</p>			
<p>** This figure does not include the recent acquisition of 988 Bass pubs.</p>			
<p>Punch includes Punch Taverns, Punch Retail, Inn Business, Vanguard, Wellington Normura includes Unique, Inntrepreneur, Phoenix, Inn Partnership, Wizard Inns</p>			