

Producing Nightlife in the New Urban Entertainment Economy: Corporatization, Branding and Market Segmentation

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Introduction

The Ministry of Sound, which started life as a London club less than ten years ago, by 2002 had the largest global dance record label and the most popular music website in the world, and published the UK's fastest growing music magazine, *Ministry*. It now promotes club events around the globe and broadcasts its radio show on 50 stations in 32 countries, thus becoming the world's most famous dance and clubbing lifestyle brand for young people (www.ministryofsound.com). Universal Studios Japan, which opened in Osaka in 1999, combines theme park rides with media studios creating a modern day 'symbiotic' media production and consumption entertainment destination (Davis 1999: 439). On 57th Street West Manhattan, NikeTown, Nike Corporation's flagship retail outlet, is described by Klein (2000: 56) as a hallowed shrine to the heroic ideals of athleticism rather than simply a sporting goods shop, with its three-story high screens and famed sports memorabilia. And 'Mythos', a theme park based on Greek mythology will open in 2004 to coincide with the Olympic Games in Athens, complete with rides, mythological figures and wandering minstrels (Emmons, 2000).

These are just a few examples typifying the worldwide spread of the theming of entertainment and leisure (Sorkin, 1992; Gottdiener, 2001) and the emergence of a new global economy rooted in an infrastructure of entertainment destinations such as themed restaurants and bars, nightclubs, casinos, sport stadia, arenas and concert hall/music venues, multiplex cinemas and various types of virtual arcades, rides and theatres (see Hannigan, 1998: 1-2). While it is clear that popular culture and nightlife have long played an important role in urban life, we would argue that the 'new' urban entertainment economy is distinguishable by an emerging mode of production including a concentration of corporate ownership, increased use of branding and theming, and conscious attempts to segment its markets, especially through the gentrification and sanitization of leisure activities. The night time economy, especially the growth of up-market style and café bars and night-clubs, has a key part to play in this new entertainment infrastructure (Chatterton and Hollands, 2002). Rather than dwelling on some of the recent self-congratulatory commentaries on 'urban cultural revival' (Comedia and Demos, 1997; Landry, 2000), our approach is otherwise concerned with how corporate control in the urban entertainment and night-life economies is further usurping and commercializing public space, segmenting and gentrifying markets and marginalizing alternative and creative local development (Zukin, 1995).

In what follows, we outline the emergence of a dominant mode of urban entertainment and nightlife production and situate it within critical discussions on the shift from Fordist to post-Fordist production and the related shift from mass to more segmented and varied forms of consumption (Amin, 1994; Kumar, 1995), the move from the welfarist to the entrepreneurial state and city (Harvey, 1989b) and the growing globalization and corporatization of economic activity (Held *et al.*, 1999; Klein, 2000; Monbiot, 2000). Beyond the rather seductive arguments of post-Fordist flexibility and

post-modern consumption, we stress a more neo-Fordist interpretation, characterized by some novel features but also a continuation and intensification of Fordist features such as increased concentration and conglomeration of ownership, a lack of real consumer choice and diversity in spite of increases in designs and branding, and continued social and spatial segregation due to market segmentation.

The first part of the paper discusses the broader processes and central features of this new nightlife economy, namely, globalization and corporatization, branding and market segmentation fuelled by moves towards sanitization and gentrification of urban environments. Second, we specifically explore these processes in relation to changes within the nightlife sector in a case study drawn from the UK which draws upon interviews undertaken with the 'producers' of nightlife venues.¹ The paper concludes by outlining some of the general implications of this emerging mode of nightlife production, and the ways in which older/historic forms of nightlife which are seen as vulgar, and independent/alternative modes of nightlife production which are seen as unruly, are both being displaced within the more 'respectable' service based corporately-driven city.

We are cognisant that our discussion reflects broader social and cultural changes in both downtown, suburban, ex-urban and complex polyurban locations rather than mere city-centre phenomena (Soja, 2000: 250; Gottdiener, 2001: 105), although we focus here upon city centres as the most visible manifestation of these trends, especially in Europe where central areas remain strong foci for cultural practices. Furthermore, the focus of this paper concentrates particularly on the production of nightlife infrastructure, while other published work examines specific city contexts (Chatterton and Hollands, 2001), consumption practices (Hollands, 2002), and active forms of resistance (Chatterton, 2002).

Situating the new urban entertainment and nightlife economy

The 'boom' in the urban entertainment economy is well documented beyond the obvious visual transformation of city landscapes. Scott (2000), for example, claims that over three million Americans work in the 'cultural' economy,² Hannigan (1998: 2) argues that jobs in the entertainment industry in California now surpass those in the

1 The research reported on here is part of a project funded by the ESRC (award number: 8000238288) on the production, regulation and consumption of urban nightlife in three UK cities (Bristol, Newcastle and Leeds). During the course of the research interviews were conducted with 41 producers (owners, company directors, area and regional managers, bar managers, bar staff), 32 regulators (relevant city council personnel, magistrates, police, doorkeepers, residents associations etc.) and 16 focus groups across the three cities, accounting for 80 young adults representing different consumption groupings (young professionals, locals, students, gay consumers, women's groups, alternative youth cultures etc). For an overarching theoretical discussion see Chatterton and Hollands (2002); an analysis of consumption groupings can be found in Hollands (2002); while a city-based discussion (i.e. the case of Newcastle upon Tyne) can be found in Chatterton and Hollands (2001). A project website can be found at www.ncl.ac.uk/youthnightlife/. A book by the authors, entitled *Urban Nightscapes: Youth Cultures, Pleasure Spaces and Corporate Power*, is to be published by Routledge in 2003.

2 Scott's (2000) definition of the cultural economy is rather broad and focuses on the cultural-product sector where he provides case studies on the jewellery, furniture, film, recorded music and multimedia industries. Zukin (1995), meanwhile, utilizes the term 'symbolic' economy which includes finance, media and entertainment, although she gives little attention to either popular culture (outside of Disney) or the nightlife scene. Our use of the term entertainment economy borrows more specifically from Hannigan's (1998) usage as it includes themed restaurants and bars, nightclubs, as well as casinos, sport stadia, arenas and concert hall/music venues, multiplex cinemas and various types of virtual arcades, rides and theatres. Again, unfortunately he largely ignores looking at bars and nightclubs, a crucial element of the night-time economy (see Chatterton and Hollands, 2002).

aerospace industry, while it has been calculated that 'fun' services have grown by over 7% in the US between 1960 and 1984 (Esping-Anderson, 1990). In the UK the leisure sector has become an important job creator, employing nearly 1.8 million people, or 8% of the workforce, a figure which has more than doubled since the 1930s (Gershuny and Fisher, 2000: 50). Davis (1999: 437), meanwhile, states that entertainment is one of the hottest sectors in real estate circles and Gottdiener *et al.* (1999: 256) have referred to the spread of the entertainment ethos and architecture in the USA as 'the Las Vegasization of city downtowns'. In Europe, Port Vell in Barcelona is one of the most well known examples amongst the growing number of 'waterside leisure areas' composed of shops, bars/restaurants, hotels, IMAX theatre and marina/aquarium, while China has seen the building of 41 theme parks over the last decade (Hannigan, 1998: 2).

While there are a host of examples and strong empirical support documenting the growth and development of new urban 'landscapes of consumption', especially shopping malls (Shields, 1992; Goss, 1993; Wrigley and Lowe, 1996; Connell, 1999), the entertainment and nightlife economy has received far less attention. In particular, while much of the new entertainment economy is being fuelled by the growth of night-time activity, very little work has analysed the transformation of many cities into 'nightlife hotspots' (although see Chatterton and Hollands, 2001; Chatterton and Hollands, 2002; Hollands, 2002). To aid us here, the emergence of the new entertainment and night-life economy can be situated with reference to wider economic, political and socio-cultural changes characterized generally under the rubrics of Fordism, post-Fordism and neo-Fordism (Harvey, 1989b; Lash and Urry, 1987; Amin, 1994; Kumar, 1995), and more specific discussions about flexible specialization and accumulation (see Piore and Sabel, 1984; Harvey, 1989c; Sabel, 1989), a growing literature on (anti) globalization and corporatization (Held *et al.*, 1999; Klein, 2000; Monbiot, 2000), the move towards a service-based, cultural and 'symbolic' economy (Lash and Urry, 1994), changes in the local/welfare state and the rise of the entrepreneurial city (Harvey, 1989b; Burrows and Loader, 1994; Jessop, 1997), and critiques of postmodern, de-differentiated consumption (Warde, 1994; Hollands, 2002), especially in relation to market segmentation and branding (Klein, 2000).

Fundamentally, the Fordist/post-Fordist transition refers to changes in the production process, although these clearly imply broader political and cultural transformations (Kumar, 1995: 37). Rooted in the development of new types of small-scale, flexible, integrated and high-tech production utilized by small firms clustered in industrial districts (epitomized through the Third Italy phenomenon of the 1970s and 1980s — see Brusco, 1982), and debates around small batch production of goods through 'flexible specialization' aided by new technologies (Piore and Sabel, 1984; Sabel, 1989), post-Fordism was viewed by some as a new stage of capitalist and political organization (Lash and Urry, 1987). Responding to the inflexibility and saturation of national (western) mass production markets, post-Fordism is supposedly characterized not only by more flexible production techniques, but also organizational changes (like decentralization and globalization of capital, outsourcing and subcontracting), a decline in the function of national welfare states and changes in consumer preference towards more individualized forms of consumption with an increasingly global reach (Kumar, 1995). In effect, crisis ridden western capitalist economies since the 1970s, faced with declining economic growth, disinvestment of material production and 'manufacturing flight' to lower cost locations (Massey and Allen, 1988; Harvey, 1989c; Held *et al.*, 1999) have sought new avenues of wealth generation. Service employment, especially business and financial services, and increasingly activity in the 'cultural economy' (Scott, 2000), have grown rapidly to offset manufacturing loss. In its constant search for new profit areas, then, 'capitalism itself is moving into a phase in which the cultural forms and meanings of its outputs are becoming critical if not dominating elements of productive strategies' (Scott, 2000: 2).

Flexible accumulation, one particular 'take' on the post-Fordist transition (Harvey, 1989a), is based upon the assumption of 'flexibility' not only in relation to the labour process, but also with respect to types of products, services and markets. In this sense,

Kumar (1995) points out that saturation of markets for mass goods, the exhaustion of groups of mass consumers and the dictates of new styles of life, along with ceaseless technological innovation, all call for a rapid turnover and swift changes in production. Such flexibility suits firms too, as they eagerly search for ways to exploit and expand new markets. Not surprisingly there has been a shift towards investment in, and the marketing of, different types of products and services in the cultural economy. To quote Harvey (1989c: 285): 'If there are limits to the accumulation and turnover of physical goods ... then it makes sense for capitalists to turn towards the provision of very ephemeral services in consumption'. Perhaps more accurately in terms of the production of entertainment and nightlife, Lash and Urry (1994) point to the emergence of 'reflexive accumulation' in which the accumulation process is based around more knowledge and 'service' intensive activities and a concentration on the production of signs and symbols, rather than material goods.

In general terms under this model, production is more knowledge-intensive and involves small-batch tasks undertaken within dense networks of vertically disintegrated units. Capital flows towards the production of more goods and services that are ephemeral and spectacular (a live music concert; a casino), disposable (beer; fast food), lifestyle-based (branded venues and products), and even 'virtual' (internet, virtual reality parks, computer games). In other words, 'fast moving consumer goods and services' as they are known in the business world (du Chernatony and McDonald, 1998) — epitomized by entertainment, popular culture and nightlife activity — require constant replenishment and are a particularly effective tool for speeding up capital accumulation. Moreover, while cultural and entertainment products might initially involve high start-up costs, reproduction and distribution is cost effective and can generate almost ceaseless profits (Scott, 2000). Entertainment and especially nightlife, for example, involves a temporal expansion of capital accumulation past the typical retail 'flight', encouraging late night activities catering for pre-family young adults, students and tourists. Finally, multifunctionality is now the cornerstone of many leisure developments (Gottdiener, 2001: 101), developing synergies between retail, media, real estate, sports, nightlife, dancing, eating and other entertainment pursuits. Sports bars and sex tourism have become two recent additions here, mainly imported from the USA (*ibid.*). Such multifunctionality requires new spaces and avenues for combined profit-making in urban entertainment destinations (UEDs) which combine sports bars, internet cafes, licensed merchandise shops and generate hybrids such as edutainment, eatertainment and shopertainment (Hannigan, 1998).

There has been a steady influx of such developments in downtown areas in the UK bringing together cinema, retail, eating and nightlife and drawing upon anchor tenants such as Warner Brothers, TGI Fridays, Starbucks coffee shops, Hard Rock Cafés, Planet Hollywoods and Disney Stores. Initially, while most UEDs were built outside city centres in 'green field' sites (like the Gateshead Metro Centre and Merryhill in the West Midlands), they are slowly beginning to make their presence felt in city centres. The most famous amongst them is the Trocadero in London's Piccadilly Square, an entertainment and retail destination comprising global brands such as UGC Cinemas, Planet Hollywood, Bar Rumba and the Rainforest Café. DLG Architects have built a new wave of urban entertainment complexes including the Light in Leeds, heralded as a 'whole new city centre experience', the Great Northern Experience in Manchester and Broadway Plaza in Birmingham, all comprising multiplex, family entertainment centres, health and fitness centres, bars, restaurants, residential and retail uses.

While the Fordist/post-Fordist typology is a useful 'ideal type' for an analysis of the entertainment and night-life industry, there are a number of important caveats and reservations around the idea of a linear and unfettered transition. First and foremost, very rarely are convincing arguments or empirical results offered for the flexibility thesis which states that mass markets are now exhausted and that the future of competitive production lies with producers pursuing variety and creating niches for their products (Fine, 1995: 136). In this sense, there is clearly a degree of continuity within this transition, whereby post-Fordism is a reworking of earlier mass systems of

Fordism (Aglietta, 1979). Hasse and Leulfstrud, (2001: 111) have recently written that 'flexible modes of production are predominately integrated into established forms of mass production', while Kumar (1995: 58) notes that for the transnational globalizers, the 'global standardization of Dallas and McDonalds can co-exist quite happily with the artificial diversity of Disneyland and the manufactured localism of the heritage industry'. Elements of Fordist mass consumption, then, clearly remain alongside more differentiated, post-Fordist forms in many sectors of the entertainment economy, including the brewing sector and nightlife. Present day consumer markets are characterized by non-differentiated mass produced goods, distinct market segments, dominance by certain producers, and strong producer as opposed to consumer interests, alongside new consumer power facilitated through growing credit and indebtedness, commodification of more areas of social life, a profusion of market segments, greater preference for non-mass, specialist goods, consumer volatility and politicization, shorter good life spans and greater aesthetic rather than functional consumption patterns (Urry, 1990: 14; 1995: 151).

One notable trend here for entertainment and nightlife has been the continuing shift in ownership and control away from national entities and more locally grounded collections of self-made entrepreneurs, towards a small number of global corporate entities (Hannigan, 1998). In this sense, large corporations have begun to take on aspects such as decentralization and flexible specialization, alongside standardization and market domination (Kumar, 1995: 44–5). Although the contemporary processes of globalization and market concentration vary across space and are tempered by national and international regulatory frameworks, the impact on everyday culture and entertainment activities is increasingly visible. As Held *et al.* (1999: 158) comment: 'in the post-war era every sector of the communications and cultural industries has seen the rise of larger and larger corporations, which have become increasingly multinational in terms of their sales, products and organization'. For example, while a small number of major global entities such as Time Warner, Sony, Viacom, Disney, Bertelsmann and NewsCorp have come to play a key role in production, more importantly they now also play a central role in the distribution of cultural forms (Held *et al.*, 1999; Scott, 2000) and hence dominate everything from the conception to the consumption of cultural goods and services. If the ultimate goal is market expansion, then global mergers, synergies and cross promotions abound. With the erosion of anti-trust and anti-monopoly laws across the USA and Europe, such large companies increasingly have a freehand in directing entertainment and nightlife production.

In terms of brewing, this trend towards global concentration continues at a rapid pace. Worldwide, around thirty brewery companies currently account for two-thirds of the beer produced (European Commission, 2001: 1). Moreover, trade in hops has become concentrated in the hands of two major groups over the last four years, accounting for 40% and 30% respectively of the total world market in hops (*ibid.*: 3). A number of large firms have grown from their home markets to dominate large geographical regions. These include Anheuser-Busch (A-B) the world's largest brewer, Adolph Coors Co. and Miller Brewing Co. (owned by Philip Morris) in the USA, AmBev in South America, Kirin/Lion Nathan in the Asia-Pacific, South-African Breweries in Africa, and Heineken, Carlsberg and Interbrew in Europe (see Table 1).

Interbrew, the second largest brewer in the world after a spate of acquisitions, in particular is intent on global domination and has an unashamed goal of beating America's Anheuser Busch to be the world's largest brewer. Interbrew's products are sold in 110 countries, and in the highly competitive UK market it is already the market leader. Over the 1990s, Interbrew have entered a phase of rapid expansion, and completed 30 acquisitions and strategic joint ventures, the largest of which were Labatts (Canada), Oriental Breweries (South-Korea), SUN Interbrew (Russia), Bass Brewers and Whitbread Beer Company (UK). Interbrew's recent acquisition of the German family-owned Becks company for £1.1 billion signals its ongoing commitment to consolidation and infiltration into the world's most prosperous alcohol markets. The company motto, 'the world's local brewer', demonstrates its desire to be both global

Table 1 World's biggest brewers: by sales volume, 1999

Rank	Company (Country HQ)	Million Hecto Litres
1	Annheuser Busch (USA)	154.7
2	Interbrew (Belgium)	79.6
3	Heineken (Netherlands)	74.0
4	Ambev (Brazil)	59.0
5	South African Breweries (South Africa)	55.2
6	Miller (USA)	51.7
7	Kirin/Lion Nathan (Japan/New Zealand)	39.7
8	Carlsberg (Denmark)	37.0
9	S&N/Kronenbourg (UK/France)	33.0
10	Coors (USA)	30.0

Source: Bilefsky (2000)

and local, and its commitment to the rather awkward goal of 'glocalization'. Although the sector is increasingly concentrated, then, what is evident are highly intricate webs of interrelationships, cross-investments, collaboration and competition which have been woven by the leading international beer companies in their fight for domination (Bellas, 2001). Recent mergers between, for example, Antarctica and Brahma in South America, and Interbrew, Bass and Whitbread in Europe are evidence of this.

Beneath the spectacle and carnivalesque atmosphere of entertainment and the production of individualized niche markets, therefore, lurks an increased concentration and conglomeration of ownership by a small number of large corporate firms. As Klein (2000: 130) suggests 'despite the embrace of the polyethnic imagery, market-driven globalization doesn't want diversity; quite the opposite. Its enemies are national habits, local brands and distinctive regional tastes'. The globalization of the entertainment industries and products is a reminder that the logic of capital is still based at least partly on economies of scale, standardization and homogeneity (Ritzer, 1993; Kumar, 1995: 188–9). While global players seek to create the impression that they are sensitive to local and national contexts with their language of 'global localities', the overall effect, however, is often one of 'serial' monotony or reproduction (Harvey, 1989b), with the majority of cities and regions adopting a familiar approach in their creation of an entertainment economy and nightlife infrastructure. De-nationalization and de-localization of entertainment, in conjunction with concentration of ownership, then, is a central feature of this transformation.

The new entertainment economy has also flourished due to political processes and regulatory responses by the national (Burrows and Loader, 1994) and local state to changes in the global economy and shifts in production (Harvey, 1989b). The 'return to the urban centre' (O'Connor and Wynne, 1995; Harvey, 2000) is underpinned by a belief that the revitalization of core areas of old industrial cities is crucial for economic renewal. This has resulted in a fundamental rethink as to the role of the local state, in particular, chronicling a shift in its historic managerial and welfarist functions, towards aiding urban regeneration via property development, deregulation and encouraging corporate inward investment (Jessop, 1997). Along with a renaissance of city centre employment and housing markets, cultural or creative industries have been used in the economic and symbolic rejuvenation of local economies throughout the West in the wake of manufacturing decline (Pratt, 1997; Williams, 1997; Hall, 1999; Scott, 2000).

Entertainment and nightlife have become central components of this economic restructuring process and have provided many localities assumed escape routes to offset decline in the local economy (Chatterton and Hollands, 2002). While the city at night

has historically been regarded as the shadowy 'other' of the working day as a place for marginal, crime ridden and liminal pleasures (Lovatt, 1995), since the 1980s nightlife and a host of popular cultural activities, often promoted through the idea of the '24-hour city' and various forms of deregulation, have become an accepted part of urban growth (Bianchini, 1995; Lovatt, 1995; Heath and Stickland, 1997). As a result, a raft of public subsidies and public-private partnerships have emerged to help kick-start not only the urban housing and office markets, but to develop cultural, night-time and entertainment facilities (Harvey, 2000).

One of the most obvious features of the 'new' entertainment and nightlife economies is that they have become highly branded and theme-centric (Hannigan, 1998; Gottdiener, 2001; Chatterton and Hollands, 2002). Brand, originally meant 'to burn' or to mark a product in some way to distinguish it from other similar items (Murphy, 1998: 1; Stobart, 1994: 1), while theming refers to entertainment venues being rolled out across the globe accorded to a scripted idea, such as the all pervasive Irish pub or the Las Vegas style casino. While not a new phenomenon — Bass beer is often considered to be one of the first product brands created in 1876 (Stobart, 1994: 3) — branding has developed over the last one-hundred or so years into a 'business process' which is designed to exemplify a company's core essence.

There have been crucial changes in the nature of branding over the past fifty years which are important for our later discussion. First, with the move from manufacturing to a service economy, there has been a corresponding shift towards the branding of services and images, and not just products. Moreover, the world's largest branders have busily been divesting from material production and shifting it overseas to cheaper cost locations to concentrate on producing brands rather than products (Klein, 2000). In late capitalist economies awash with consumer goods, then, surplus value is generated not from price or product differentiation, but rather through symbolic or brand differentiation (Gottdiener, 2001). This is particularly the case when we look more closely at the nightlife industry, where we see a move away from just selling a product (alcohol), to offering a range of services (food, music, sports on TV, email etc.) and lifestyles (atmosphere, experience, cultural capital). Second, the branding of products and services on the basis of their physical and tangible elements have increasingly given way to distinguishing them through their 'intangible' or 'product surround' qualities - i.e. aesthetic and emotional elements (Hart, 1998). Branding in this sense is designed not only to create product loyalty but consumer identity and social status (Klein, 2000). Third, branding has become an international phenomenon, with numerous successful 'power brands' (Murphy, 1998) emerging across the world aided by the impact of global marketing and advertising. Brand value, not necessarily the financial stability of a company, is increasingly important in today's climate of corporate mergers and takeovers, as evidenced by Interbrew's recent purchase of Beck's beer for £1 billion because it was seen as a 'good brand' (Clark, 2001).

Branding works on number of levels. As table 1 shows, the 'spatial' domination of beer brands means there is bound to be a degree of standardization and homogeneity in markets where that company brand reigns supreme (i.e. Anheuser Busch in the USA, Heineken in Europe). However, specific product brands are often utilized to create and indeed exploit different market segments, distinguishing premium from standard, mass brands. Stella Artois, owned by Interbrew is a good example here of how a product can be a standard brand in one country (Belgium) but a premium brand in another (the UK). Most companies, then, manage a portfolio of brands to capture both mass, standardized and niche, premium markets, hence exploiting both economies of scale as well as scope (Kumar, 1995: 190).

The development and co-existence of niche and mass brands, is particularly important for understanding the functioning of the contemporary night-time economy. Unlike other areas of consumption such as tourism (see Urry, 1990), taking part in nightlife has not historically been restricted to a social elite. However, differences between particular nightlife places have long existed and functioned to highlight significant social differences. Urry (1990: 23) outlines how differences in historic

ownership patterns, between for example smallholders and the landed classes, have determined the social tone of consumption destinations, differentiating mass, cheap from elite, niche consumption destinations. Urry (1990) elaborates on these different consumer markets through the duality of the 'collective gaze' of the sociable working classes and the 'romantic gaze' of the more detached middle classes. Nightlife, then, like other forms of consumer practices, offers the potential for the consumption of positional goods, which have been used particularly by the new 'white-collar' service classes to distinguish themselves from other social groups (Bourdieu, 1984). Such distinction requires constant effort and the continual reworking and upgrading of new nightlife concepts through which participants can maintain social 'distance' and social status.

New arenas which offer possibilities for social distinction have emerged, especially with the dissolution and de-traditionalization of sites of identity formation such as the home, work and the church and the rise of new identities in the mall, the stadium, the night-club and the arena (Lash and Urry, 1994; Rojeck, 1995; Sennett, 1998). Young adults have a particular role to play here, as they are often identified most strongly with this transformation (Miles, 2000) and the growing demand for specialized lifestyle goods and services. Part of this relates to changes in the economy which have resulted in extended youth transitions (exemplified by higher rates of unemployment and terms like 'post-adolescence' and 'middle youth'), and involvement in cultural activity, including nightlife and entertainment for much longer periods of time (Hollands, 1995).

Urban nightlife, then, has become internally segmented across a number of lifestyle segments. While there is not a strict correspondence between class and nightlife consumption preferences, labour market position does play a key role here. The upper classes, celebrities and their wannabes continue to colonize the most exclusive and expensive nightlife destinations. Attracting previously underrepresented groups such as women, gay and ethnic populations into commercial nightlife has introduced the possibilities for a series of new nightlife concepts, which are often created in packaged and sanitized formats such as gay villages, female friendly bars and ethnic entertainment zones. The rise of incomes amongst wealthy city dwellers, urban service professional classes (Ley, 1996; Butler and Savage, 1995; Butler, 1997), and university students (Chatterton, 1999) has been the greatest stimulant of demand for stylized, safe and sanitized nightlife. In particular, business tourism and corporate hospitality have been significant players in pushing nightlife forward. There are a number of leisure and taste divisions here, such as those between public and private sector workers (Savage *et al.*, 1992), particular occupational groupings, such as creative industry workers who are often prolific and competent consumers, and students who are a rather differentiated group. Overall, it is assumed here that these consumers of gentrified downtown leisure and nightlife have specialized, niche preferences. The post-tourist sums up such preferences where consumers are bored and listless, playful and ironic and search out authentic environments such as the newly gentrified architecture of the industrial city — old banking halls and mills converted into theme bars and lofts.

City centre gentrification (see Ley, 1996; Smith, 1996), traditionally conceived through changes in the housing market, provides a number of telling lessons here.³ Gentrification has become concerned with the production and consumption of urban social and spatial differentiation. Smith (1996: 114) argues 'Gentrification is a redifferentiation of the cultural, social and economic landscape, and to that extent one

3 Traditionally, gentrification relied very much on a physical description of the phenomenon and its effects, rather than a theoretical explanation of why the process exists or why it has accelerated and declined in particular historical periods (Butler, 1997). Originally the term was coined by Ruth Glass in the early 1960s to describe the invasion and displacement of working-class areas by the middle classes in urban areas in the UK (particularly London). Primarily it referred to this process in terms of housing, but also generally the transformation of neighbourhoods (i.e. schools, shops, leisure provision), and only more recently entertainment and nightlife, for example see Chatterton and Hollands (2001).

can see in the very patterns of consumption clear attempts at social differentiation'. In his terms, it is the 'class remake of the central urban landscape' (*ibid.*: 39). Gentrification is also increasingly being tied up with economic, social and cultural restructuring, broadening its focus to include the cultural and aesthetic infrastructure necessary to support different lifestyles and identities in the new urban economy (Zukin, 1988; 1995).

Consumption outside of housing is becoming an important part of the gentrification process and recent discussions are beginning to include fashion, style and taste. The move back into the urban centre described through gentrification, then, is highly selective, creating hermetically sealed living-working-playing environments for a new group of mobile, wealthy, young and usually childless urban livers who are driving the development of the mainstream. As housing, office, leisure and nightlife markets are recast through successive waves of property redevelopments, attached to them is a strong narrative of the 'public' who should (young professional service workers, trendy urbanites) and should not (younger teens, the homeless) inhabit city spaces. Along waterfront locations, this process has become all too obvious, with Baltimore, Cleveland, Barcelona and Melbourne all creating leisure and playscapes from the residue of their industrial infrastructures. Different gentrifiers are behind such changes (Butler, 1997: 35), including alternative (Ley, 1996) and 'marginal' groups (i.e. gentrification led by gay and lesbian consumers), and students (Chatterton and Hollands, 2001). Further, Butler and Robson (2001) have explored four broad lifestyle and cultural types within the gentrifying middle-classes: highly mobile empty nesters with heavily work dominated lives; high consuming gentrifiers who are attracted to 'global' places of consumption; hedonistic counter-culturalists who are drawn to marginal areas; and enclavists who huddle together in protective ghettos.

More mass, mainstream and commercially-oriented nightlife is provided for those in more routine and lower order service jobs seeking weekend escapism and 'hedonism in hard times' (Hollands, 1995). Many young people regard the 'weekend' as a sacred time for letting go and self-indulgence, a time when they are in control away from the prying eye of employers. For many young people, themed, mass, commercially-oriented nightlife meets many of their desires for fun, hedonism and predictability. The mass mainstream is popular as it offers safe, predictable environments which provide easy to read sensory cues and easy and familiar pathways through consumption choices without encountering undue stress (Gottdiener 2001: 148). Unemployed, low income and welfare dependent groups literally have no space here and instead are objects of suspicion and surveillance (Smith, 1996; Ball *et al.*, 2000).

It is important, then, not to overstate the flexibility thesis in cultural terms either (i.e. the 'cultural turn'), by simply reading off a particular set of more differentiated postmodern consumption practices from a supposed more flexible mode of production (see Warde, 1994, who also makes this critique). It is the heightened power of the new service middle classes rather than the weakened power of the collective working classes who are the focus for various consumer market segments (Urry, 1990: 87) and who are currently leading the restructuring of urban nightlife. Young, cash-rich professionals and urban livers are the industries favoured consumers of nightlife and entertainment facilities (Wynne and O'Connor, 1998). Hiding major class divisions beneath trendy lifestyle categories, the nightlife sector is in reality carved up between mainstream and premium lifestyle provision, with operators preferring to pander towards middle-class taste and 'riskless risk' (Hannigan, 1998). Wynne and O'Connor's (1998) study of middle-class urban livers in Manchester found that this affluent, mobile and largely childless group were not particularly experimental or postmodern, but represented a large 'open middle' of consumer tastes who avoid environments where access is unfamiliar. Much of this lack of experimentation reflects balancing work, family and social commitments for such 'cash-rich, time-poor' groups. Gentrified nightlife environments, then, consciously sanitize and exclude the poor and disenfranchized (Sibley, 1995; MacDonald, 1997; Ruddick, 1998; Toon, 2000). They not only reaffirm existing structures in the labour and educational markets (Smith, 1996), but also hide

the 'dirty' back regions of entertainment production by constructing the illusion of a wealthy urban oasis (Zukin, 1995) — which in terms of nightlife are reinforced through subtle demarcations based around dress and style codes, interior design, drink prices and entry requirements (Chatterton and Hollands, 2001).

Restructuring, corporatization and concentration in UK urban nightlife

In the first section of this paper, we have sought to theorize the emergence of the entertainment and nightlife economy and track some dominant features including transformations in its mode of production, increased concentration of ownership, and use of branding/theming and increased market segmentation which panders largely to cash-rich groups. Next we chart the emergence of this dominant pattern with specific reference to urban nightlife in the UK. It highlights the shifting balance between local, regional, national and increasingly multinational capital and the implications for older, historic and newer, alternative forms of nightlife production.

Both the production of beer and of nightlife spaces (pubs, bars, and night-clubs) in the UK has been subject to restructuring and concentration over the last century. In terms of brewing, while in 1930 there were 559 brewery companies in the UK, by 1998 there were only 59 (BLRA, 1999). By the turn of the new millennium, only three brewers dominate the supply of beer in this country. In terms of the producers of nightlife spaces, traditional operators, often local or regional brewers or independent entrepreneurs, have largely been acquired and displaced by a small number of large national brewers which over the course of the twentieth century came to play a dominant role in the ownership of pubs (BLRA, 1999). Over the last decade the monopoly of these national brewers has been broken up and the ownership and production of nightlife spaces is a complex hierarchy comprised mainly of larger publicly-quoted national and multinational entertainment and pub companies ('pub-cos'), a historic legacy of national, regional and local brewers and a small number of local independent entrepreneurs. Drawing upon work in Newcastle upon Tyne (Chatterton and Hollands, 2001), Figure 1 highlights this shift from local and regional capital towards national/international capital within nightlife over the last fifty years. Of particular note is the decline of a number of small brewers, mainly through mergers with Scottish and Newcastle, and by 2000 the dominant role of a few operators.

The watershed event for the restructuring of UK nightlife was the 1989 Monopolies and Mergers Commission report, which concluded that a complex monopoly existed in the brewing industry largely as a result of high levels of vertical integration in which brewers owned everything from production to the point of sale (Mason and McNally, 1997). At this time, 88% of public houses were either managed by breweries or tied to them as tenanted houses. The 1989 Report led to the Supply of Beer Orders Act which aimed to break the monopoly ownership of the national brewers by restricting the 'tied house' system so that no brewer could own, lease or have any other interest in more than 2000 pubs, that at least one guest beer should be sold, and that loan tying should be abolished (*ibid.*: 412). As a result, most large national brewers sold off large stocks of public houses to come within these limits or divested from brewing altogether to get around the limits on pub ownership imposed upon them. However, the Beer Orders Act was never fully implemented as breweries only had to release ties on half its pubs held over the 2000 limit and the loan ties were never completely abolished (*ibid.*).

Since then, the brewing and pub-owning sectors have grown increasingly functionally separated and there has been an acceleration of mergers, concentration and rationalization within both. On the brewing side, whereas in 1989 there were six big national brewers in the UK (Grand Metropolitan, Bass, Allied, Whitbread, Scottish and Newcastle and Courage), by 2000 Scottish Courage remains the only national level brewer with annual beer sales in excess of £2 billion (Ritchie, 1999. Alongside

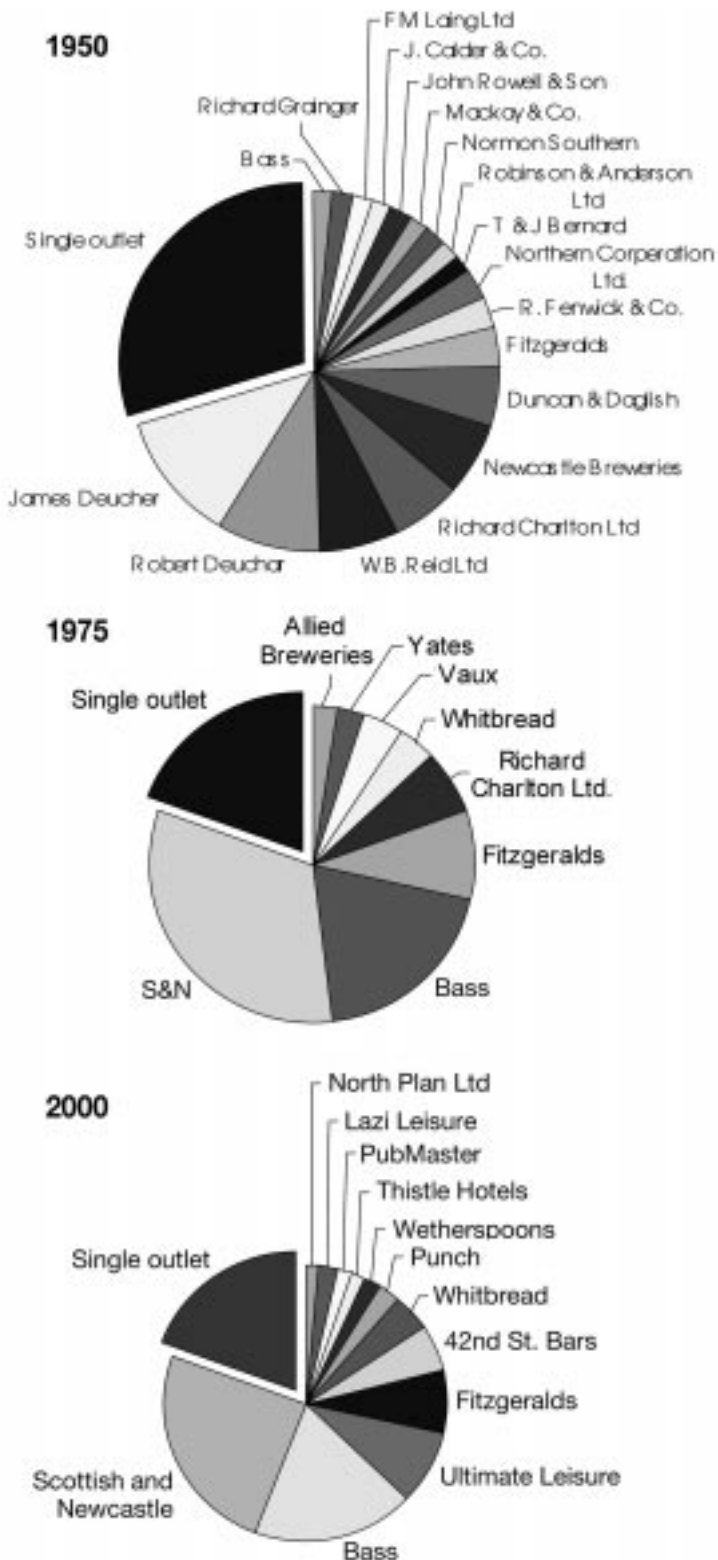


Figure 1 The progression from local/regional capital to national/international capital since the 1950s (Newcastle upon Tyne)

Interbrew, Carlsberg-Tetley and Guinness, these four super-brewers control 81% of the beer sales in the UK.

In terms of pub ownership, a number of types of operators dominate. Many well established historic brewers, such as Scottish and Newcastle, Bass (now Six Continents) and Whitbread, have grown into multinational entities. They continue to own large pub estates and have the resources to manage a wide portfolio of venues including premium branded bar venues and unbranded tenanted pubs. However, they are increasingly divesting their unbranded stock and are concentrating on branded mixed-use lifestyle venues, restaurants, health centres and hotels. More significant has been the emergence of a new breed of highly profitable pub estate companies, or 'pubcos' who have reinvigorated the high street drinking market into a rapidly growing sector in the UK worth an estimated £2.5 billion (*The Publican*, 5 February 2001: 17). While some of these were initially established by former brewers as subsidiaries to avoid the restrictions of pub ownership set by the Beer Orders Act, subsequently a new breed of highly aggressive and acquisitive 'pubcos', backed largely by international corporate financial houses, emerged to profit from the further divestment of property by brewers. For example, 70% of the Punch Group is owned by the US investment firm Texas Pacific Group, Pubmaster is backed by WestLB one of the largest German banks, and Morgan Grenfell, a large investment company, has acquired much of Whitbread's pub estate.

Over the last decade, such pubcos have flourished as more and more pubs have been put on the market by former brewers with around 70 such companies existing across the UK who own estates of 30 or more pubs/bars. While the number of premises has stayed roughly static at about 62,000, the number owned by national brewers has fallen from 32,000 to 3,300 over the last ten years (now accounting for 5.3% of the pub market). In contrast, pubcos who owned 16,000 outlets in 1989 now own around 49,000 (accounting for nearly 80% of the market). In particular, as Table 2 shows, the growth of multi-site pubcos has been dramatic, accounting for nearly 50% of all pubs in the UK.

Many of these acquisitive national pubcos have shown remarkable levels of growth, such as Nomura Principal Investment Group, which has prospered by buying up

Table 2 Change in pub ownership in the UK, 1989-2000

	1989	2000 Jan	2000 July
<i>National Brewers</i>			
Tenanted	22,000	2,724	1,000
Managed	10,000	7,336	2,300
Sub total	32,000	10,060 ^a	3,300 ^b
<i>Regional Brewers</i>			
Tenanted	9,000	5,939	5,939
Managed	3,000	3,498	3,498
Sub total	12,000	9,437	9,437
<i>Non Brewer Operators</i>			
Single/independent	16,000	18,098	18,098
Multi-site pubcos	-	24,196	30,956
Sub total	16,000	42,294	48,392
Total	60,000	61,791	61,791

^a Bass, Scottish & Newcastle, Whitbread

^b Scottish & Newcastle only

Source: *The Publican Newspaper* (2000)

premises from brewers or former brewers (see profile in Appendix). Similarly, the JD Wetherspoon pub chain, which started from a single premise in London, is touted as the fastest growing company in the UK and ninth in Europe (JD Wetherspoon company website, 2001). It is engaged directly in the 'serial reproduction' of mainstream high street nightlife, with its cheap beer, no music or TV, 'just a pub philosophy', although it has recently added a premium pub brand to its growing stable. Established in the 1970s, the company has rapidly reached a pre-tax profit of £15.6 million in 2000 and hopes to boost its estate from 400 to 2,000 pubs in the next few years depending on the market. The company has been able to dominate the mainstream high street through bulk buying and the selling of heavily discounted drinks and food. As Table 3 shows, the top 10 leading UK pub operators now account for nearly 50% of all pubs and bars, only three of which still have a connection with brewing. Smaller pub companies owning only a handful of venues do still exist and have introduced innovative new nightlife venue concepts. In particular, there are also a number of regional brewers with sizeable pub estates such as Greene King, Wolverhampton and Dudley and Young and Co. However, such companies are extremely susceptible to buy-outs from larger predatory operators eager to buy successful bar brands to expand and be able to float on the stock exchange.

This ongoing restructuring has significant implications for the ways in which pubs and bars are operated. The recent growth of super pubs, style bars and branded restaurants has shifted ownership in favour of managed rather than tenanted outlets which is indicative of a continuation of 'Fordist' management type structures (see Sabel, 1989). There are some signs that more flexible tenanted leases and franchises may be enjoying a limited renaissance since they offer stable rental income and reduce overhead costs for pub operators as there is less need for area managers, head office staff, personnel and marketing departments. Moreover, operators are aware that tenancies can offer a differentiated product in contrast to the large glut of branded pubs and bars which fill Britain's high streets. This is more in keeping with post-Fordist notions of subcontracting and outsourcing (Kumar, 1995: 60–1) and an example of 'flexible mass production' (Sabel, 1989). However, there are limits to diversity even

Table 3 Pub ownership in the UK, 2000

	Outlets	Managed	Leased/ Tenanted
Punch/Wellington ^a	5,878	1,060	4,818
Nomura ^b	4,839	28	4,821
Whitbread PLC	3,714	1,990	1,724
Bass	3,046	3,046	-
S&N*	3,300	2,330	1,000
Enterprise Inns ^c	2,437	-	2,437
Pubmaster Ltd	2,050	-	2,050
Wolv & Dudley*	1,993	997	996
Greene King*	1,730	630	1,100
Alehouse Prop.	830	50	780
Total for top 10	29,817 (48% of all pubs in the UK)		

* Brewer

^a Punch includes Punch Taverns, Punch Retail, Inn Business, Vanguard, Wellington

^b Nomura includes Unique, Innpreneur, Phoenix, Inn Partnership, Wizard Inns; this figure does not include the recent acquisition of 988 Bass pubs

^c After a recent purchase of parts of the Nomura pub estate in 2002, Enterprise Inns became the UK's leading pub company

Source: *The Publican Newspaper* (2000)

here as tenants are often tied into particular buying agreements which inevitably lead to a standardization of product availability. Nomura has even set up a website for its tenants listing suppliers to buy from. The Nomura-owned Innpreneur pubco is currently facing a number of legal challenges from tenants for illegally 'tying' them into above-market price buying arrangements with suppliers — a practice which was outlawed under the Beer Orders Act.

Clearly, such dramatic restructuring has implications for older, independent and alternative modes of nightlife production characterized by ale houses, saloons and one off venues owned by sole traders. Many small independent operators we interviewed were pessimistic about the encroaching influence of large corporate operators. As one independent owner commented to us:

with corporate enterprise taking over more and more they have a game plan that they will follow which is domination of city centre sites ... but I think the long term view is that corporate rape and pillage will continue. You know they're all gobbling each other up because they've got to grow.

These large, corporately-backed pubcos are able to put up large sums of money to transform high-value listed city centre buildings in prime locations into new premises, spatially squeezing out independent entrepreneurs and dominating the urban landscape. Urban nightlife, then, has become a competitive arena with only the strongest, or wealthiest, able to survive (Zukin, 1995).

Previous research (Chatterton and Hollands, 2002) has shown that, in general, in large provincial metropolitan centres international/national corporate operators control approximately two-thirds of the pub market, while independent operators own between 5% and 30%, with the remainder comprised of regional operators. Regional variations do exist within UK cities, with, for example, Newcastle Upon Tyne maintaining a strong element of local and regional nightlife operators which have to a certain extent resisted the spread of larger non-local operators.

In sum, the UK pub and bar sector has virtually been severed from its historical association with national and place-based brewers and historic pub retailers, and more recently its monopolization by the big breweries since the 1950s. However, deregulation has not produced a post-Fordist panacea of numerous small companies emerging to drive forward nightlife production. Rather, there has simply been a carving up of the different components of the industry with the overwhelming proportion of urban nightlife venues now owned by a handful of corporate operators, many backed by global equity and finance houses, while the UK beer market is dominated by two multinationals, Interbrew and Scottish-Courage. Powerful sectoral lobby groups have emerged such as the Portman Group, a company established in 1989 comprising alcohol producers such as Bacardi, Scottish & Newcastle (S&N) and Interbrew which together supply about 95% of alcohol sold in the UK. While the Portman Group's stated aim is to 'reduce the misuse of alcohol', they have been an effective vehicle for ensuring that large alcohol providers are portrayed as responsible corporate citizens and that their needs, over that of consumers, are taken on board by government.

Nightclubs are currently experiencing similar levels of merger activity, although overall it is less concentrated than the pub trade. Yet, while the nightclub industry had sales of over £2 billion in 1997, and admitted around 185 million people through their doors (Mintel, 1998: 15), many operators are facing new challenges due to falling audiences and the blurring of the division between pubs and clubs. As a result, some small operators are going bust which is opening the way for the emergence of large operators in the UK such as the PoNaNa Group and Luminar Leisure. Luminar has grown through the £360 million acquisition of Northern Leisure, recent buyers of Rank Leisure, one of the most established entertainment operators in the UK, and most recently it has bought 10 clubs from S&N in Scotland. Luminar now runs 250 late night venues including brands such as Chicago Rock Cafe, Jumpin Jacks, Life and The Café Bars and it has become the largest operator in the UK owning 15% of all night clubs.

In conclusion, it is currently a highly volatile and unstable period for the pub and bar market. With 6,500 or 10% of the country's pubs up for sale during the beginning of 2001 (*The Guardian*, 18 January 2001: 13), takeovers, mergers and divestments abound. What is evident, is that some brewers who have divested from brewing, like Bass (now Six Continents Retail — see Appendix for profile) are also slowly divesting from pub ownership into relatively unexploited, unsaturated and higher profit markets such as pub restaurants, fitness centres and hotels. Perceived shifts in demographic and consumption patterns strongly linked with population aging also mean that such areas will be strong areas for future growth. Remaining nightlife operators are pursuing various strategies to appeal to a variety of cash-rich groups within the night-time economy. These include developing more mass and standard nightlife brands and themes, as well as more premium lifestyle brands and specialist niche venues. It is to this stratification that we now turn.

Branding and market segmentation in UK urban nightlife

While branding is far from a new phenomena in urban nightlife, it has grown from its origins in alcoholic products (Tennant, 1994) to apply to whole/multiple retail outlets and has become a central part of the expansion strategies of many pubcos. Eight percent of all pubs in the UK (4,776 outlets) are now branded using one of 206 brands with the top five pub operators controlling 63% of branded pubs (*The Publican Newspaper*, 2000). In city centres, the branding process is much higher with about 30% of premises branded in the three cities we analysed. In particular, out of 3,300 outlets, Scottish & Newcastle Retail claim that '50% of the estate is currently branded. This will rise to 70% by April 2002' (Scottish & Newcastle website, 2001).

The mode of nightlife production based upon brand development is a purposeful attempt to shape new consumer identities in the night time economy and can be understood as part of the wider restructuring of night-time entertainment production. On the one hand, niche branding can be seen as evidence of the industry moving away from the declining Fordist model associated with a mass consumption experience in the largely male and ale dominated traditional pub (Harrison, 1971; Gofton, 1983). Pub branding exploded during the 1990s through the emergence of Aussie, Irish and sports themed bars. The development of themed bars is closely related to assumed shifts in consumer demand. Typically, stereotypical profiles loosely related to class are conflated into lifestyle categories, which then form the basis for a number of supposed niche markets (Goss, 1993). As a result, Firkin and It's a Scream brands are associated with students, All Bar One, Bar 38 and Quo Vardis target professional office workers, while Bar Oz, Walkabout, OutBack Bar and SpringBok target sports fans. At the same time, even niche branding can be viewed as an extension of Fordist principles, in that it can represent simply a more 'flexible' type of mass production (Sabel, 1989). For example, theming has come under heavy criticism from consumer groups and publicans alike due to its damaging effects on the identity of the traditional British pub and its clientele (Everitt and Bowler, 1996), not to mention the fact that many consumers recognize that rather than being unique, such premises are both artificial and homogenous (see the Campaign for Real Ale survey quoted in 'Lets keep it real', *Evening Chronicle*, 19 January 2001: 23).

Despite this disquiet, many large operators are now organized around branded divisions rather than geographical areas. While many first generation brands are now tired, there is no end to new 'roll outs' and brands that have proved successful in one pub are often expanded nationally. Larger national chains have taken the branding concept a step further; many nightlife venues are increasingly disconnected from their placed-based and brewing legacies and refer more to a wider lifestyle experience rather than a mere place for the sale of alcohol. Freed from the chains of the mundane production of beer, corporate pub companies now have the time and extra financial

resources to develop brand images (Klein, 2000) and attempt to draw on wider synergies associated with an experience beyond the sale of food and drink by developing a wider lifestyle experience based around certain dress codes and social mores. The most recent turn in branding is a focus on café bar brands such as Bar Censa (S&N), Tiger Tiger (Chorion) and Lloyds No. 1 (JD Wetherspoon). Alcohol drinks themselves have become more brand than product. Hence, 'can I have a beer?' has been replaced by 'can I have a Becks?'

Hiding the reality of corporate ownership is also a way for operators to detract attention away from their market domination and to encourage consumers to believe that they are making a discerning decision between real nightlife choices. As Nick Tamblin, the managing director of the Chorion Group has said, 'There has to be a bigger difference between each Tiger Tiger club than between Burger King and McDonalds' (J. Doward 'Tiger Tiger plans to burn bright in city nightlife' *The Observer*, 16 May 1999: 1). Moreover, developing a portfolio of brands allow companies to develop a number of distinct identities, target several audiences and operate at several venues in one location without competing with themselves for customers. The attractiveness of branding as a strategy stems from its ability to offer a wider 'lifestyle' experience, to increase rational production techniques and hence reduce costs and overheads and tap into certain sacred consumer principles such as consumer choice, quality through reputation, safety, convenience and reliability (du Chernatony and McDonald, 1998; Ritzer, 2001). Many new pub and bar concepts have promoted the development of new types of licensing arrangements, new attitudes to dress codes and gender relations, have encouraged a diversity of uses, generally mixing eating and drinking, and a 'chameleon' approach appealing to different audiences throughout the day, and are dedicated to the three Fs — family, food and females (Mintel, 2000), while evening custom is highly directed towards pre-family young adults.

Branding has become an imperative for most large publicly-quoted firms as a way of minimizing risk and maximizing profits for shareholders and gaining the trust of stock market investors. As a representative from a large operator we interviewed exclaimed:

As far as the City [London Stock Exchange] is concerned half a dozen pubs in one town means nothing to them. Whether they make — you know — good money or not it is not something . . . I mean the City loves brands, they love things that you can roll out and you can have 20/30/40.

Aided by an increasingly business-led and cash-strapped local state, such large operators are finding it easier to gain a greater foothold in urban centres (Harvey, 1989a). Moreover, as urban cores continue to be gentrified through a combination of high value added service jobs, leisure, nightlife and housing, squeezing out locally based and lower order activities, it is easier for non-local operators to introduce global and national branded nightlife concepts.

While branding involves market differentiation based around certain groupings and may even involve attempts to brand versions of the 'traditional pub' (Scottish & Newcastle's John Barras brand and J D Wetherspoon's 'just a pub' philosophy are two examples here), one clear trend is towards branding upmarket premises, targeting 'cash rich' and high disposable income groups. One of the key reasons for this is that the nightlife market is already saturated, with over 90% of the young adult population drinking alcohol and 80% and 52% going out to pubs and clubs at least once a month respectively (Mintel, 1998; 2000). The other main reason is that premium markets, while smaller, are potentially more lucrative in terms of profit margins (Batchelor, 1998). Finally, there is much evidence to show that the young service and professional classes are growing in many UK core cities, and they are fuelling demand for more up-scale facilities (Wynne and O'Connor, 1998; Chatterton and Hollands, 2001). Smarter, upmarket, exclusive style and café-bars then have emerged in order for certain social classes to re-distinguish themselves (Bourdieu, 1984) from the mass nightlife market.

Reviewing the situation from a number of UK cities (see Figure 2), it is evident that

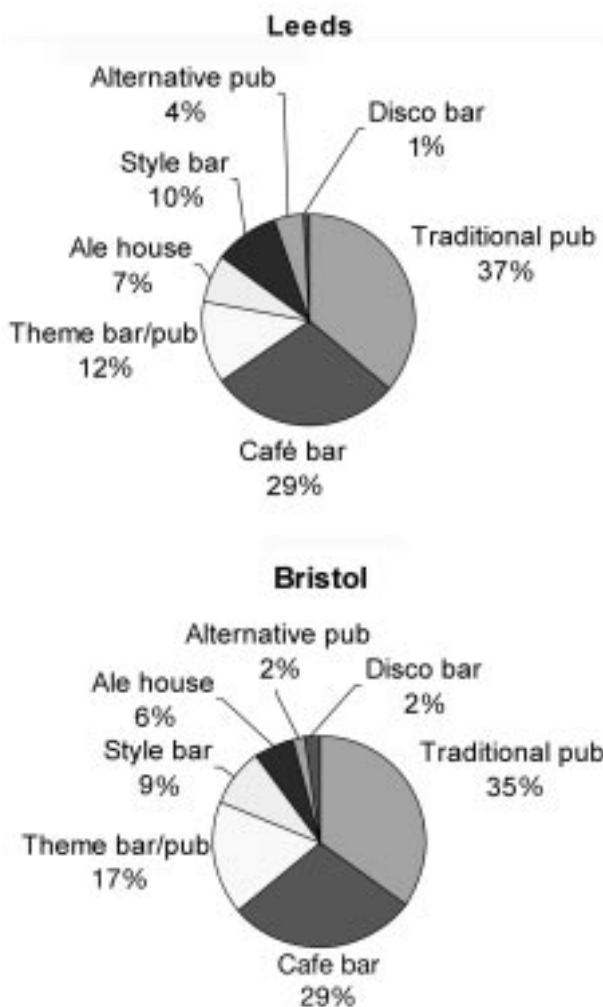


Figure 2 The expansion of style, themed and branded venues in UK cities in the 1990s (Leeds and Bristol)

the growth of style, themed and branded venues has been dramatic and to the detriment of traditional, alternative and residual, older pubs. In cities such as Bristol and Leeds, for example, which have witnessed significant city centre business service sector growth and hence nightlife expansion over the 1990s, style and café bars account for about 40% of all venues. Conversely, alternative pubs and ale houses account for a small and rapidly falling amount (around 10%), and while traditional pubs still account for around one-third of venues, this is likely to fall over the coming years as city centre operators shift their focus to branded operations.

There are numerous examples of the gentrification of nightlife to draw on here. Chorion’s Tiger Tiger brand, which started in London, with plans to roll out further premises in Leeds Manchester and Birmingham, is described as an ‘upmarket nightclub’ or themed ‘super club’ (comprising bars, restaurant, club in one) catering for a 25 plus age group. The Luminar Group has talked of upgrading and stylizing many of the traditional night-clubs they inherited from Rank, and Surrey Free Inns (SFI) bought the Slug and Lettuce chain, described as ‘yuppie’ bars ‘aimed at affluent urban professionals, offering quality food and premium beers’, to compliment its other two slightly less up-market brands Bar Med and Litten Tree (*The Guardian*, 2 September 2000: 25). It is also worth noting that SFI own For Your Eyes Only venues, a chain of

lap dancing bars aimed at ‘corporate clients’, which signifies a growing normalization of the sex industry within urban nightlife.

Even S&N Retail, one of the few national brewers still involved in the pub business, have sought to utilize middle-class values as a yardstick for the development of their various brands. For example, in a discussion of brands they argue: ‘This lack of confidence in first generation brands is well placed . . . Today’s middle class customers are more experienced, better travelled, have higher aspirations, and higher standards’ and ‘bars have become the norm for increasing numbers of mainstream young consumers, whose levels of sophistication have risen’ (Scottish & Newcastle Website, 2001). Additionally, another ‘mainstreamer’, mass-market pubco, JD Wetherspoon has introduced a more upmarket style and café type venue called Lloyds No. 1. to its portfolio. A review of the Manchester-based premises stated that: ‘Lloyds is Wetherspoon’s slightly more ambitious cousin — tastefully decked out with comfier seating, music to fill the pregnant pauses, nicer toilets, but the same hugely competitive beer, wine and food prices’ (JD Wetherspoon company website). Further, Wolverhampton and Dudley’s own upmarket chain, Pitcher and Piano, is aimed at 20-30 year old young professionals and has attracted enough attention as a brand to be considered to be an attractive ‘package’ for potential buyers. Branding and the move upmarket, then, is not only designed to tap into those cash-rich and allegedly more ‘trouble-free clientele’, but also is being driven by the need to increase the value of brands (Batchelor, 1998) in light of continued concentration and conglomeration within the industry.

Implications of the new ‘makers and the rakers’ of urban nightlife

What we have highlighted is the emergence of a dominant mode of nightlife production, not unlike trends in other sectors of the economy (Held *et al.*, 1999; Klein, 2000; Monbiot, 2000), based upon corporate concentration of ownership, branding and market segmentation, and general processes of gentrification and sanitization. Despite an attempt in the UK case to deregulate the industry and decrease the power of the breweries, a small number of large companies backed by international finance houses dominate the ownership of pubs, bars and night clubs and the supply and distribution of alcohol. In many ways, then, ‘corporations, the contraptions we invented to serve us, are overthrowing us’ (Monbiot, 2000: 4). Market concentration, new global players, a more entrepreneurial state, gentrification and market segmentation aimed at service sector professionals have all combined to displace older, historic modes of nightlife based around the community pub (Mass Observation, 1970) connected strongly to more mass forms of collective consumption in the working-class industrial city, not to mention marginalizing more independent modes of nightlife associated with various alternative youth and subcultures (McKay, 1997). It is worth recalling that the traditional ‘pub’ is defined in the Oxford English Dictionary as a ‘building with a bar and one or more *public* rooms licensed for the sale and consumption of alcoholic drinks’ (emphasis added). Clearly, the current round of nightlife restructuring has moved us some way from its historic predecessor. This situation has a number of implications.

First, there are a number of consequences for urban space. There is little doubt that the physical appearance and design of urban nightlife spaces in the UK has changed dramatically over the last 20 years, mainly through a decline in the number of male dominated ale houses and working men’s clubs of the 1970s and lager fuelled discos and pubs of the 1980s (Gofton, 1983; 1990) and their replacement in the mid-1990s with upgraded, mixed-use, café and style bar venues (Difford, 2000) which are highly design-led (Julier, 2000). Many of these changes appear progressive on the surface, especially in terms of opening the nightlife sector up to different social groups (especially young women), as well as attempts to ‘design out’ problems of excessive drinking and violence through the use of mixing food with alcohol, more seated areas

and higher quality interiors. However, despite changes in style and appearance, many aspects of city centre nightlife culture continue to be 'awash on a sea of alcohol' (Hobbs *et al.*, 2000), with heavy circuit drinking, vandalism and violence commonplace. Theme bars have recently been highlighted as the new 'palaces of drunkenness' (Newburn and Shiner, 2001), promoting excessive drinking through loud music, salty foods and cheap drink deals and there is contrary evidence that contemporary provision is really all that 'female-friendly' (Hollands, 1995).

What is also new is the way in which new types of nightlife have altered the urban landscape. Branded entertainment spaces have encroached into the everyday urban public realm of 'the street' (Klein, 2000) rather than being located in special separate sites (Disneyland being the classic example here). One of the most significant markers here are processes of gentrification which have transformed abandoned industrial architecture into nightlife, leisure and consumption destinations, the most notable recent trend being the conversion of banking halls into large chain bars. Industrial buildings once rooted in the fabric of working-class and community life have become the infrastructure for a new class of high-income pleasure seekers and city livers (Zukin, 1992; 1988). The shapers of these new branded 'urban playscapes' (Chatterton and Hollands, 2002) are increasingly multinational media and entertainment conglomerates who have shifted their emphasis to making entertainment 'places' as much as making products (Davis, 1999). So much so that some commentators have begun to talk about the creation of urban 'brandscapes' rather than landscapes (Hart, 1998), subsequently involving the squeezing out of what one might refer to as 'unmarketed cultural spaces' in cities (Klein, 2000: 45). Standardized, sanitized and largely non-local branded nightlife experiences are now a prominent feature of high street (and indeed suburban) nightlife, and the serial reproduction (Harvey, 1989a) of many downtown areas into US-style theme parks, multiplexes and 'casino culture' continues apace.

Second, while there may be some flexibility on the demand side (i.e. changing consumer preferences), the supply side is largely going in the opposite direction and is characterized by market concentration and dominance by a few large operators. However, greater reflexivity from consumers and the increase in choice amongst flexible brands and niche stylized nightlife environments, does not equate in any simple way to a democratization of consumer experiences (see Urry, 1990: 85). In this sense it is important to remain critical about rather seductive arguments of 'post-Fordist flexibility' and 'postmodern consumption', which often assume the existence of a new set of flexible and differentiated consumption practices (see Warde, 1994 and Hollands, 2002 for a critique). Evidence from the nightlife sector in the UK suggests that, in the main, the ongoing expansion of nightlife branding equates to a mass of fairly similar bar, pub and club formats with fewer opportunities for alternative and independent nightlife spaces which challenge commercial, market-based forms of consumption (Chatterton and Hollands, 2001). In this sense, the 'heroic', reflexive postmodern consumer (Bauman, 1988; Warde, 1994) and the 'urban flaneur' (Clarke, 1997) will find less not more, in the way of differentiated products, serendipity and excitement in the contemporary city at night.

As Klein (2000: 130) argues: 'This assault on choice is happening structurally, with mergers, buyouts and corporate synergies. It is happening locally, with a handful of superbrands using their huge cash reserves to force out small and independent businesses ... And so we live in a double world: carnival on the surface, consolidation underneath, where it counts'. The popularity of branded nightlife says more about lack of choice in city centres and the numerous difficulties involved in travelling to alternative nightlife spaces which are, in general, in fringe locations. In this sense, nightlife consumption options are often curtailed as we are offered, as Monbiot (2000: 16) suggests, 'a profusion of minor choices and a dearth of major choices'.

Third, another important aspect of this non-local branded space is a clear functional separation between the spheres of consumption and production. To quote Klein (2000: 346) again: 'The planet remains sharply divided between producers and consumers, and

the enormous profits raked in by the superbrands are premised upon these worlds remaining as separate as possible’.

Nightlife, then, rather than being a postmodern panacea of creativity is increasingly packaged as something which happens to people, rather than something which people participate in or shape. In this sense, larger, non-local venues do little to promote or connect with existing cultural practices and in general they are directed from remote head offices and have little interest or knowledge of local musical taste, styles and habits. As one DJ interviewed commented: ‘the people who are controlling the investment aren’t looking at the cultural aspects they’re just looking at the business — selling pints’.

Older/historic and independent/alternative modes of nightlife production, which have fundamentally different sets of parameters compared to the corporate world, are being displaced by a post-industrial mode of corporately-driven nightlife production in the consumption-led city. In the shadows of the bright neon exist the ‘residue’ of near forgotten groups, community spaces and traditional drinking establishments marginalized by new city brandscapes. These residual spaces and people, spawned originally to feed the industrial city, are now surplus to requirement in the newly emerging and redeveloping post-industrial corporate landscape. Moreover, many aspects of nightlife remain conflictual and a seedbed of resistance, a shadowy other to new corporate nightlife. Such alternative spaces, often located on the margins, are a sharp reminder about how less profit-oriented nightlife could be envisioned, but find fewer opportunities to exist in the corporate city. In particular, large operators are able to gain cost advantages through rational techniques of production such as bulk buying arrangements and ‘synergies’ between products (Ritzer, 2001) and exploit their greater influence over the cash-strapped local state (Monbiot, 2000) whereas smaller operators suffer from a lack of access to start-up capital and business and marketing skills, a lack of affordable property and face complex and expensive licensing laws. City centre nightlife, then, is far from a level playing field and left to the market, many smaller-scale, locally-based nightlife producers are closed down, pushed to the margins, or simply bought out.

In many places, older and more independent modes of production are evident and sit uncomfortably alongside newer, branded nightlife. There is also occasional evidence of resistance to branding and also brand failure within urban nightlife (Chatterton and Hollands, 2001). More peripheral and marginalized places have experienced less brand penetration and as a result have built up strong local nightlife cultures based around a historic market strength of entrepreneurial local companies, often run by individual self-made business entrepreneurs. In such a context, many multinational operators have found it very difficult to enter such local markets. Newcastle upon Tyne in the north of England is one such place which remains at odds with the business reality of large entertainment corporations. It has developed a distinctive ‘local nightlife brand’ based upon a historically strong and tight knit regional identity, masculine working cultures and a sort of hedonism in hard times through a desire for escapism for many young locals in the face of continuing economic constraints (Chatterton and Hollands, 2001). Unfortunately, even transitional cities like Newcastle are entering into the global corporate fray, particularly in relation to their (ultimately unsuccessful) bid to become the European Capital of Culture in 2008.

Clearly, spaces where choice and creativity are limited also become breeding grounds for new critical resources and reflexive practices. In this sense, there are other more active lines of resistance against the type of corporate dominance and branding which we have outlined (Gottdiener, 2001). Ironically, while Klein (2000) mentions that young people were seen as saviours of the brand in the early 1990s, a section of them also form the most voracious pockets of resistance. The ‘Stop the City’ and ‘Reclaim the Streets’ events of the last few decades and the growing anti-globalization movement have all in various ways brought attention to the corporate control of urban space, while the squat, free party, traveller, underground and ‘rave’ scene have provided a constant thorn in the side of corporately organized nightlife (McKay, 1997; Reynolds,

1998; Chatterton, 2002). There are also examples of resistance at the local political level such as selective purchasing agreements signed by at least 22 cities in the USA barring the purchase of goods and services from firms which break certain ethical codes (Klein, 2000). France has been particularly resistant to the growing power of multinationals and their brands. The French government have pushed for an EU directive ensuring 51% EU output on national broadcast channels, while the French anti-globalization hero, José Bové has highlighted the deleterious effects of large foreign multinationals such as McDonalds on local social and economic life (Bové *et al.*, 2001). Finally, there is Italy's Slow Food and Slow City movements which have highlighted the ills of global culture on issues such as food, health and community life (Carrol, 2000). However, actions to protect consumers from corporations are increasingly difficult, and often illegal, in the face of supra-national legislation such as World Trade Organization anti-protectionist rules, while international human rights law only applies to states and not companies.

Despite these examples of resistance, the corporatization of entertainment and nightlife appears to carry on apace through the growth of stylish bars and entertainment destinations. This emerging bias is understandable given that many large-scale nightlife developments represent significant inward investment decisions and a sizable revenue source for the local state. Additionally, for the average consumer, choice at one level appears to be growing, despite an underlying uniformity of ownership and rationalization of production. Although global cultural practices are digested, adapted and resisted by places and certain social groups, there is an increasingly transnational secular ideology (Held *et al.*, 1999) where the brand is king and queen. Traditionally, nightlife has not been a sector that the anti-corporate movement has organized around. In many ways this is understandable as the reality of concentration of ownership and foreign control or financial backing of nightlife by highly acquisitive international financial houses largely hides behind traditional, place-based brands. Consumers have little knowledge of, or interaction with, companies such as Nomura or Interbrew whose explicit logic is market growth and domination. A greater awareness of such corporate operators, and their strategies of branding, market domination and segmentation within nightlife, is a first step towards producing more democratic, creative and diverse nights out.

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Appendix – Profiles of Nomura and Six Continents Retail

Nomura: A global-local landlord

The UK's biggest pub landlord Nomura is also the largest securities firm in Japan, playing a significant role in many key markets around the world through its banking, investment and venture capital divisions. The firm has operations in some 30 countries around the world, 12,310 employees and total assets of some 20,529,135 million yen as of 31 March 2001. While its main business is providing individual and corporate trading services in its home market, it has also sought to revive its fortunes with a range of mergers and acquisitions outside of Japan. Under the direction of the managing director of its Principal Finance Group, Guy Hands — reportedly said to personally earn in region of £40 million pounds a year — Nomura has embarked on a £10 billion buying spree, acquiring some of the UK's best known brand names. The Nomura portfolio includes betting chain William Hill (now sold off), off-licenses Thresher and Victoria Wines, international hotel chain Le Meridien, the Ministry of Defence married quarters,

and joint ownership of Boxclever (an amalgamation of Granada and Radio Rental). It also paid £700 million for one-third of British Rail's rolling stock, and won the bidding contest to redevelop the Millennium Dome, after attempts to buy it failed. Nomura is well known for buying companies, turning them around and selling them at a profit.

Nomura's recent acquisition of nearly 1,000 pubs from Bass PLC vaulted it to No. 1 among pub owners in the UK, with around 5,500 pubs (ahead of Punch Taverns). Previously, it bought 1,800 GrandMet and Fosters pubs for £250 million. With regard to its purchase of Bass, the idea is to move away from a centrally managed estate to 'tenanted' outlets, leased to local entrepreneurs who would pay rent. Nomura is poised to get even more dominant as market leader, as it is the current favourite to bid for 740 pubs put on the market by Scottish & Newcastle.

Six Continents Retail: From working-class beer to middle-class hotels

Bass Brewers, who divested from brewing and now is slowly divesting from many of its traditional pubs, has re-launched itself as Six Continents Retail, a global leisure group concentrating upon upmarket hotels such as Inter-continental in the USA, SPHC in Asia and Holiday Inns in Europe and branded restaurants and nightlife venues such as All Bar One, O'Neills and Harvester. Tellingly, the company has been divesting from what have traditionally been lower profit working-class and community based activities such as traditional tenanted pubs, Gala Bingo Halls and Coral Bookmakers. Following the sale of Bass Brewers and the Bass 'brand' which was seen as too localized for its global ambitions, a further 988 smaller pubs were sold in February 2001 for £625 million as they were not deemed suitable for re-branding. As a result Six Continents Retail is now concentrating on 2,000 larger nightlife venues in the UK with a very high proportion either branded or due to be branded.