



Economic and Fiscal Contributions of the Nightlife Economy in Dallas, TX

Economic Impacts

2023



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INTRODUCTION



RESEARCH OVERVIEW

The nightlife industry represents an integral part of the economy in Dallas, Texas. Spending by customers at nightlife venues and businesses (both on- and off-site) sustains thousands of jobs and generates billions in economic activity and state and local tax receipts. Economic impact analysis measures the impacts of the nightlife economy in categories that allow it to be compared to other sectors and which matter to stakeholders and policy makers. These categories include tax generation, employment, wages, and business sales.

Visit Dallas and the City of Dallas commissioned Tourism Economics, an Oxford Economics Company, to conduct a comprehensive analysis of the economic and fiscal (tax) impacts attributable to the nightlife economy in Dallas, TX in 2023.

To quantify the economic impact of the nightlife economy in Dallas, Tourism Economics prepared a comprehensive model using multiple primary and secondary data sources (including data from the Bureau of Labor Statistics and the U.S. Census Bureau) to quantify the impacts arising from various components of the nightlife economy.

Impact modeling was based on an IMPLAN Input-Output (I-O) model for the regional economy of Dallas. The results of this study show the scope of the nightlife economy's impact in terms of business sales at nightlife establishments and ancillary spending by nightlife customers, as well as total economic impacts of the industry, including employment, household income, and fiscal (tax) impacts.



EXECUTIVE SUMMARY

The nightlife industry represents an integral part of the economy in Dallas, TX. Spending by customers at nightlife venues and businesses (both on- and off-site) sustains thousands of jobs and generates billions in regional economic activity and state and local tax receipts. Economic impact analysis measures the impacts of the nightlife economy in categories that allow it to be compared to other sectors and which matter to stakeholders and policy makers. These categories include tax generation, employment, wages, and business sales.

Sectors in the Dallas Nightlife Economy

The nightlife economy in Dallas includes the following five sectors and all economic activity that occurs within the sectors listed below from 6 p.m. to 6 a.m.*:

- **Restaurants & food service:** includes full-service restaurants, limited/partial-service restaurants, food trucks, and cafes and encompassed more than 5,500 establishments with \$8.8 billion in total sales and more than 102,000 total jobs
- **Bars:** includes more than 800 total drinking establishments and nightclubs throughout Dallas, with nearly \$3.3 billion in total business sales and nearly 26,000 total jobs
- **Arts and Culture:** includes more than 80 performing arts venues, movie theaters, galleries, and museums with \$226 million in business sales and nearly 1,300 total jobs
- **Venues:** includes approximately 100 concert and live entertainment venues, independent venues (not including performing arts venues included in the Arts and Culture sector), and informal performance spaces with \$273 million in total sales and more than 1,800 total jobs
- **Sports and Recreation:** includes more than 80 sports and recreation venues such as bowling alleys, arcades, family entertainment centers, amusement venues, and professional, spectator, and recreational participatory sports throughout Dallas, with approximately \$370 million in sales and nearly 1,900 part-time and full-time jobs
- **Ancillary spending:** includes additional spending by customers as a result of participating in nightlife activities. Spending categories include retail, lodging, and transportation (including ride shares, taxis, public transportation, parking and spending on gasoline). Ancillary spending in 2023 amounted to \$2.1 billion and supported more than 77,000 part-time and full-time jobs

*: Tourism Economics utilized the North American Industry Classification System (NAICS) to identify industries that contribute to the nightlife economy. NAICS is the industry standard to classify business establishments based on sector. The research team estimated economic activity within each sector using employment and wage data from the Bureau of Labor Statistics and the U.S. Census Bureau, as well as data on economic output from IMPLAN.



Sectors Comprising the Dallas Nightlife Economy

Restaurants & Food Service	Bars	Arts & Culture	Sports & Recreation	Venues
				
Full-service restaurants, limited/partial-service restaurants, food trucks, cafes, concessions and other food establishments	Nightclubs, bars/drinking establishments that primarily serve alcoholic beverages	Performing arts venues, movie theaters and live theaters, museums and art galleries, other live performing arts	Professional, spectator & participatory sports, family-oriented activities (bowling, arcades, family entertainment centers, etc.)	Live entertainment & concert venues, independent venues, informal performance spaces

Source: Tourism Economics (2024)

Direct Spending Impacts

Nightlife businesses generated significant economic impacts through sales and jobs in the region.

In addition to spending money at businesses within the sectors that comprise the nightlife economy, nightlife customers also generated ancillary impacts as they spent money on items such as transportation (including gasoline, ride shares, and public transportation), lodging, and retail purchases within the local economy.

Overall, the Dallas nightlife economy generated \$15.0 billion in direct spending, including \$12.9 billion in sales at nightlife establishments and \$2.1 billion in ancillary spending by nightlife customers.

Figure E1: Dallas Nightlife Direct Economic Impact, 2023
by Sector (\$ millions)

Sector	Establishments (number of businesses)	Employees (part-time & full-time)	Labor Income (\$ millions)	Business Sales (\$ millions)
Restaurants & food service	5,531	102,428	\$2,746	\$8,768
Bars	848	25,933	\$965	\$3,285
Arts & culture	83	1,299	\$54	\$226
Venues	102	1,807	\$77	\$273
Sports and recreation	83	1,870	\$80	\$373
Subtotal, nightlife sectors	6,647	133,337	\$3,923	\$12,925
Ancillary spending		77,390	\$1,367	\$2,088
Direct Impact of Nightlife Economy		210,727	\$5,290	\$15,013

Sources: Tourism Economics (2024), Bureau of Labor Statistics (2024), U.S. Census Bureau (2024)

Note: Nightlife impacts represent estimated business activity between the hours of 6 p.m. and 6 a.m.

Summary Direct Impacts of Dallas Nightlife Economy (2023)



\$12.9B

Direct Business Sales
at Nightlife
Establishments

+



\$2.1B

Ancillary Spending
by Nightlife
Customers

=



\$15.0B

Direct Impact of
Dallas Nightlife
Economy



The Dallas nightlife economy generated a **direct impact of \$15.0 billion** in sales and directly supported nearly **211,000 jobs** in 2023

Dallas Nightlife Economy

Summary Economic Impacts in 2023

Total Economic Impacts

The direct impact of the Dallas nightlife economy amounted to \$15.0 billion, including sales at nightlife establishments and ancillary spending by nightlife customers.

Including indirect and induced impacts, the Dallas nightlife economy's direct impact of \$15.0 billion generated a total economic impact of \$24.4 billion and supported 256,000 total jobs.

The total economic impact of \$24.4 billion generated approximately \$864.0 million in total state and local tax revenues.



\$24.4 BILLION

Total Economic Impact of the Dallas Nightlife Economy in 2023

Summary Economic Impacts of Dallas Nightlife Economy (2023)



\$15.0B

Direct
Impact of
Dallas Nightlife
Economy



\$24.4B

Total
Economic
Impact



256,000

Total
Jobs
Generated



\$864.0M

Total
State & Local
Tax Revenues



The total economic impact of the Dallas nightlife economy amounted to **\$24.4 billion** and supported **256,000 total jobs** in 2023

Dallas Nightlife Economy

Economic Impacts by Nightlife Sector

In addition to analyzing the economic impacts attributable to the Dallas nightlife sector as a whole, Tourism Economics also estimated the economic impacts of each of the five sectors comprising the Dallas nightlife economy.

- **Restaurants & food service:** includes more than 5,500 full-service restaurants, limited/partial-service restaurants, food trucks, and cafes. The restaurants and food service sector generated a direct impact of \$10.1 billion (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$16.6 billion, supporting 197,000 total jobs and \$596.5 million in total state and local tax revenues.
- **Bars:** includes more than 800 total drinking establishments and nightclubs throughout Dallas. The bars sector generated a direct impact of \$3.8 billion (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$6.2 billion, supporting 50,000 total jobs and \$215.6 million in total state and local tax revenues.
- **Arts and Culture:** includes more than 80 performing arts venues, movie theaters, galleries, and museums. The arts and culture sector generated a direct impact of \$261.0 million (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$415.0 million, supporting 2,500 total jobs and \$12.3 million in total state and local tax revenues.
- **Venues:** includes approximately 100 concert and live entertainment venues, independent venues (not including performing arts venues included in the Arts and Culture sector), and informal performance spaces. The venues sector generated a direct impact of \$313.4 million (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$511.6 million, supporting 3,400 total jobs and \$13.6 million in total state and local tax revenues.
- **Sports and Recreation:** includes more than 80 sports and recreation venues such as bowling alleys, arcades, family entertainment centers, amusement venues, and professional, spectator, and recreational participatory sports throughout Dallas. The sports and recreation sector generated a direct impact of \$440.0 million (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$721.4 million, supporting 4,000 total jobs and \$26.0 million in total state and local tax revenues.

Figure E2: Dallas Nightlife Economy
Summary Economic Impacts by Nightlife Sector



Source: Tourism Economics (2024)

Note: The direct impacts include business sales and ancillary spending by nightlife customers within each nightlife sector.

Dallas Nightlife Economy

Economic Impacts by Entertainment District

Tourism Economics estimated the economic impacts of the nightlife economy in the six Dallas entertainment districts listed below. The research team coordinated with local stakeholders within the nightlife economy to identify entertainment districts that have substantial levels of nightlife activity.

- Bishop Arts
- Deep Ellum
- Downtown Dallas
- Greenville
- Oak Lawn / Cedar Springs
- Uptown / Harwood District / Victory Park

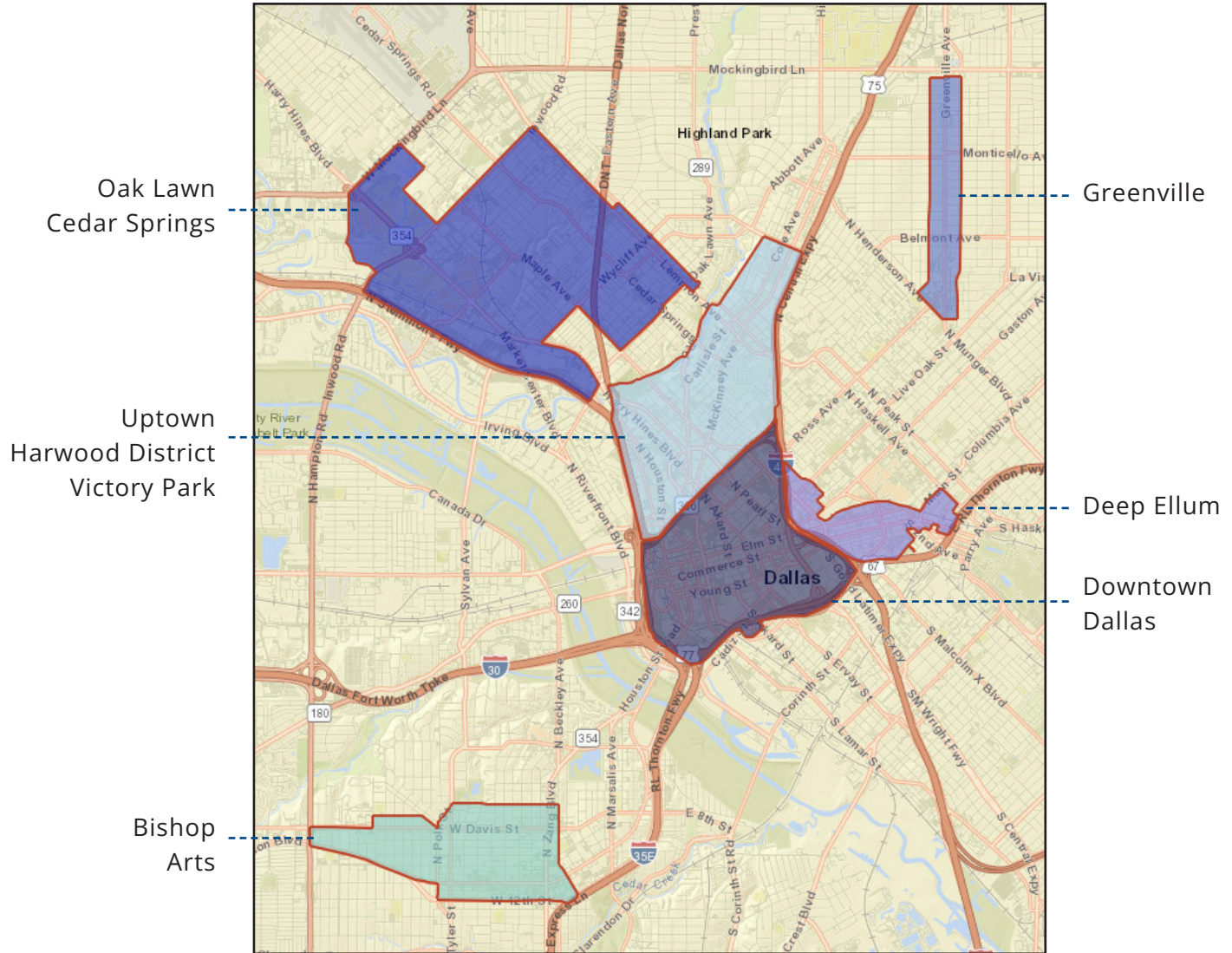
For each entertainment district, the research team compiled business-level data on employment and business sales in 2023 and estimated summary economic impacts of the nightlife economy in each district. Similar to the analysis of the Dallas nightlife economy, the analysis of the nightlife economy in each entertainment district considered business activity that occurred between the hours of 6 p.m. and 6 a.m. The table below summarizes the number of nightlife establishments within each identified district, as well as the total employment impact, total economic impact, and total state and local tax revenues attributable to the nightlife economy.

Figure E3: Dallas Nightlife Summary Economic and Fiscal (Tax) Impacts, 2023 by Entertainment District (number of establishments, jobs and \$ millions)

	Number of Establishments	Total Employment Impact	Total Economic Impact (\$ millions)	Total State & Local Taxes (\$ millions)
Bishop Arts	100	2,464	\$323.7	\$11.6
Deep Ellum	92	2,308	\$343.5	\$11.9
Downtown Dallas	225	12,972	\$967.7	\$35.8
Greenville	68	1,583	\$186.4	\$7.1
Oak Lawn / Cedar Springs	118	4,394	\$527.6	\$18.3
Uptown / Harwood District / Victory Park	194	11,597	\$1,165.3	\$44.3

Sources: Tourism Economics (2024), Bureau of Labor Statistics (2024), U.S. Census Bureau (2024), DataAxle (2024)
 Note: Nightlife impacts represent estimated business activity between the hours of 6 p.m. and 6 a.m.

Figure E4: Dallas Nightlife Economy Select Dallas Entertainment Districts



Source: Tourism Economics (2024)

Dallas Nightlife Economy Nightlife Economy Perspectives

As part of the research project, Tourism Economics distributed surveys and conducted interviews with nightlife stakeholders, including nightlife consumers, business owners, employees, professionals, and community members and leaders. The survey responses and interviews provided key perspectives on the current state of the Dallas nightlife economy, as well as key issues and factors facing the industry.

- Surveys of Dallas nightlife consumers, including residents living in Dallas, local residents living outside Dallas, and non-local visitors
- Surveys of Dallas nightlife professionals, including owners or operators of nightlife establishments, artists or entertainers, and employees and nightlife establishments
- Interviews with nightlife stakeholders, including owners or operators of nightlife establishments, public officials, policymakers, developers, activists, and community members

Nightlife Consumer Surveys

Types of establishments: Dallas nightlife consumers most commonly frequented restaurants (93%), live music and concerts (72%), bars and clubs (68%), and cultural performance venues and visual arts (63%). A considerably lower portion of nightlife consumers indicated they frequent private house parties (33%) and underground or pop-up parties (20%)

Reason for going out: Nearly all consumers (81%) indicated they go out at night to connect with family or friends, while nearly three-quarters indicated they go out to relax and unwind, and 60% go out to experience arts and culture.

Factors that influence consumers' choice of nightlife activities: The survey asked consumers to indicate (on a scale of one to five) how certain factors influence their choice of nightlife activities. Personal preferences and tastes ranked as the top factor, with an average score of 4.69. Opportunity to attend a unique experience was the only other factor that had an average score above four (4.01). Minimal wait time (3.77), affordability (3.74), and easy accessibility via public transportation (2.39) scored relatively low compared to personal preferences and tastes.

Challenges consumers see in nightlife activities in Dallas: The survey asked consumers to indicate challenges they see in nightlife activities in Dallas. The top two responses were public safety and price/affordability, with 57% and 54% of consumers, respectively, choosing these options. Transportation accessibility (41%), lack of variety (27%), and hours of operation (21%) followed. Noise and inclusivity ranked last, with just 13% and 11% of consumers, respectively, indicating they viewed them as challenges in nightlife activities.

Consumer survey respondents selected **public safety and price/affordability as the top two challenges** facing the nightlife economy

Nightlife Business Owner and Operator Surveys

Offerings at nightlife establishments: Nearly all respondents (87%) indicated they offer liquor at their nightlife establishment. More than 42% of respondents offer some sort of music or live entertainment, 39% offer cultural arts, and 32% of respondents offer a DJ at their nightlife establishments. Approximately 13% indicated they offer other options, including drag shows and curated events.

Change in business revenues at nightlife establishments between 2021 and 2023: Survey respondents indicated how revenues at their nightlife establishment changed in recent years. More than 19% of respondents indicated no change in revenues between 2021 and 2023. The remaining respondents were evenly split, with 41% of respondents indicating revenues had decreased between 2021 and 2023, and 41% indicating revenues had increased between 2021 and 2023.

Expected change in business revenues at nightlife establishments over the next three years: Just 9% of respondents expected no change in revenues at their nightlife businesses over the next three years. A combined 16% of respondents expected a decrease in revenues over the next three years. As a sign of continued recovery and growth after the COVID-19 pandemic, a combined 75% of respondents expect revenues at their nightlife businesses to increase over the next three years, with 38% of respondents expecting an increase between 5% and 10%.

Main factors influencing how nightlife businesses will attract customers: Neighborhood perception ranked as the top factor influencing how businesses will attract customers over the next three years, with nearly three-quarters (72%) of respondents selecting it as a factor. Safety also ranked highly, with 56% of respondents selecting it as a top factor.

Main operating challenges facing nightlife business owners and operators: More than half of respondents (53%) indicated rising commercial rents will be a main operating challenge. Nearly half of respondents (50%) identified regulatory red tape as an operating challenge, while slightly less than half of respondents (47%) selected price and affordability.



Among nightlife business owner and operator survey responses, **neighborhood perception ranked as the top factor** influencing how businesses will attract customers over the next three years

Opportunities for the Future

In addition to distributing surveys to nightlife customers and business owners, operators, managers, and employees, Tourism Economics also conducted interviews with key Dallas nightlife stakeholders and community members to gauge the current landscape of the nightlife economy and identify key challenges and opportunities facing the sector.

The Dallas Nightlife Economy Must Evolve: Nearly all interviewees acknowledged the need for the nightlife economy to evolve in order to meet consumer's changing preferences and tastes. While the nightlife sector has successfully rebounded since the COVID-19 pandemic, and consumers are once again going out and spending money, nightlife consumers are spending their money differently and are looking for a new, unique, diversified sets of experiences beyond just going to restaurants and bars to eat and drink.

While Dallas offers so many concepts and opportunities, a key challenge will be stimulating consumers by introducing them to new concepts. Results from the Dallas nightlife consumer survey indicate that "personal preferences and tastes" and "opportunity to attend a unique experience" scored the highest among factors influencing consumers' choice of nightlife activities. Nightlife businesses must be able to evolve to meet consumers' ever-changing preferences.

Several business owners who participated in interviews provided examples of integrating new music, live entertainment, and arts and cultural components to successfully attract new customers. With a growing population base in Dallas, as well as major, large-scale events like FIFA World Cup 2026 on the horizon, the Dallas nightlife economy is poised to evolve to continue its role as a key driver in the regional economy.



"The Dallas nightlife economy has to evolve to offer consumers more than just eating and drinking."

Key Issues & Challenges Facing the Dallas Nightlife Economy: As the nightlife economy continues to rebound, and in certain cases, surpass pre-pandemic levels of activity and sales, businesses face a new set of challenges and obstacles to succeed within the nightlife economy. Owners of nightlife businesses (including restaurants, bars, night clubs, comedy clubs, and recreational activity centers) indicated they had to change their business models and reinvent themselves when consumers returned to nightlife activities. Inflation on goods on services, as well as difficulties with the labor pool, are key operational issues affecting profitability for nightlife businesses.

Based on business owner/operator survey responses and interviews, safety ranks as the top factor affecting business performance. More than 72% of owners/operators selected neighborhood perception, and 56% selected safety as a key factor in attracting customers over the next three years. In addition, nearly 60% of surveyed consumers indicated nighttime public safety was a key issue facing the nightlife economy. Most business owners who participated in interviews indicated they had implemented and paid for additional security and precautionary measures (on top of the police and safety measures from the City of Dallas) in order to address customer safety concerns and perception. Beyond concerns for customers' safety, owners/operators also cited employee safety as an important concern, as well as transportation accessibility.

The City's Role in the Continued Success of the Dallas Nightlife Economy: Given the newly created Nighttime Economy and Responsible Hospitality Division, the City's role in the continued success of the Dallas nightlife economy will be more important than ever. Interview participants were excited by the new focus and felt the Responsible Hospitality Division could potentially address issues facing the nighttime economy such as public patrols, safety stations, and "simple things like adding more trash cans" to mitigate littering issues.

In addition, interview participants felt the division could streamline processes to help businesses "navigate the red tape of City Hall regarding permits, licenses, and codes." Given the importance of safety concerns, the majority of interview participants felt one of the most important roles of the City from a policy standpoint would be to "stay ahead of safety issues and concerns."

While the Nighttime Economy and Responsible Hospitality Division was just recently created, business owners and nightlife community members are hopeful it will "elevate the voice of the nightlife community a little higher in the echelons of City Hall" and help shape the future of the Dallas nightlife economy by connecting, collaborating, and communicating with nightlife business owners, business districts, community members, and city departments.

DIRECT IMPACTS



Dallas Nightlife Economy

Defining the Nightlife Economy

The nightlife industry represents an integral part of the economy in Dallas, TX. Spending by customers at nightlife venues and businesses (both on- and off-site) sustains thousands of jobs and generates billions in regional economic activity and state and local tax receipts.

Nightlife infrastructures are complex in any economy and include a range of customers, businesses, and other components. For example, nightlife customers include local residents (including city residents and commuters who live outside the city limits), and both domestic and international visitors. In addition, the nightlife economy also includes a wide range of businesses, as well as employees who work to sustain the nightlife economy in Dallas.

Sectors in the Dallas Nightlife Economy

The first step in analyzing the economic impacts of the nightlife economy involves identifying the specific sectors, or industries, that comprise the overall nightlife economy. The nightlife economy in Dallas includes the five sectors identified below and all economic activity that occurs within these sectors from the hours of 6 p.m. to 6 a.m.

Sectors Comprising the Dallas Nightlife Economy

Restaurants & Food Service	Bars	Arts & Culture	Sports & Recreation	Venues
				
Full-service restaurants, limited/partial-service restaurants, food trucks, cafes, concessions and other food establishments	Nightclubs, bars/drinking establishments that primarily serve alcoholic beverages	Performing arts venues, movie theaters and live theaters, museums and art galleries, other live performing arts	Professional, spectator & participatory sports, family-oriented activities (bowling, arcades, family entertainment centers, etc.)	Live entertainment & concert venues, independent venues, informal performance spaces

Source: Tourism Economics (2024)

Direct Impacts

Nightlife Business Sales & Ancillary Spending

The direct impact of the Dallas nightlife economy amounted to \$15.0 billion in 2023, including \$12.9 billion in sales at nightlife establishments and \$2.1 billion in ancillary spending by nightlife customers

Tourism Economics estimates that the five sectors within the Dallas nightlife economy, along with ancillary spending by nightlife customers, generated the following direct impacts in 2023:

- **Restaurants & food service:** includes full-service restaurants, limited/partial-service restaurants, food trucks, and cafes and encompassed more than 5,500 establishments with \$8.8 billion in total sales and more than 102,000 total jobs
- **Bars:** includes more than 760 total drinking establishments and nightclubs throughout Dallas, with nearly \$3.3 billion in total business sales and nearly 26,000 total jobs
- **Arts and Culture:** includes 120 performing arts venues, movie theaters, galleries, and museums with \$226 million in business sales and nearly 1,300 total jobs
- **Venues:** includes approximately 100 concert and live entertainment venues, independent venues (not including performing arts venues included in the Arts and Culture sector), and informal performance spaces, with \$273 million in total sales and more than 1,800 total jobs
- **Sports and Recreation:** includes more than 80 family-oriented recreation venues activities such as bowling alleys, arcades, family entertainment centers, amusement venues, and professional, spectator, and recreational participatory sports throughout Dallas, with approximately \$370 million in sales and nearly 1,900 part-time and full-time jobs
- **Ancillary spending:** includes additional spending by customers as a result of participating in nightlife activities. Spending categories include retail, lodging, and transportation (including ride shares, taxis, public transportation, and spending on gasoline). Ancillary spending in 2023 amounted to \$2.1 billion and supported more than 77,000 part-time and full-time jobs

*: Tourism Economics utilized the North American Industry Classification System (NAICS) to identify industries that contribute to the nightlife economy. NAICS is the industry standard to classify business establishments based on sector. The research team estimated economic activity within each sector using employment and wage data from the Bureau of Labor Statistics and data on economic output from IMPLAN.

Dallas Nightlife Direct Economic Impact, 2023
by Sector (\$ millions and number of part-time and full-time jobs)

Sector	Establishments (number of businesses)	Employees (part-time & full-time)	Labor Income (\$ millions)	Business Sales (\$ millions)
Restaurants & food service	5,531	102,428	\$2,746	\$8,768
Bars	848	25,933	\$965	\$3,285
Arts & culture	83	1,299	\$54	\$226
Venues	102	1,807	\$77	\$273
Sports and recreation	83	1,870	\$80	\$373
Subtotal, nightlife sectors	6,647	133,337	\$3,923	\$12,925
Ancillary spending		77,390	\$1,367	\$2,088
Direct Impact of Nightlife Economy		210,727	\$5,290	\$15,013

\$15.0 BILLION
Direct Impact of Dallas Nightlife Economy

\$8.8B

Bars

\$3.3B

\$0.4B

Sports and
recreation

\$2.1B

\$0.3B

Venues

\$0.2B

Arts & culture

Ancillary

Restaurants & food service

Sources: Tourism Economics (2024), Bureau of Labor Statistics (2024), U.S. Census Bureau (2024)
Note: Nightlife impacts represent estimated business activity between the hours of 6 p.m. and 6 a.m.



In 2023, the Dallas nightlife economy generated a **direct impact of \$15.0 billion** and supported nearly **211,000 direct jobs**

ECONOMIC IMPACTS



Economic Impacts Methodology

Tourism Economics estimated the total economic impacts of the Dallas nightlife's economy direct impacts using regional Input-Output (I-O) model based on a customized IMPLAN (www.implan.com) model for the regional economy of Dallas. IMPLAN is recognized as an industry standard in local-level I-O models.

An I-O model represents a profile of an economy by measuring the relationships among industries and consumers to track the flow of industry revenue to wages, profits, capital, taxes and suppliers. The supply chain is traced as dollars flow through the economy, representing **indirect** impacts. The model also calculates the **induced** impacts of spending. Induced impacts represent benefits to the economy as incomes earned as a result of direct spending are spent in the local economy, generating additional sales, jobs, taxes, and income.

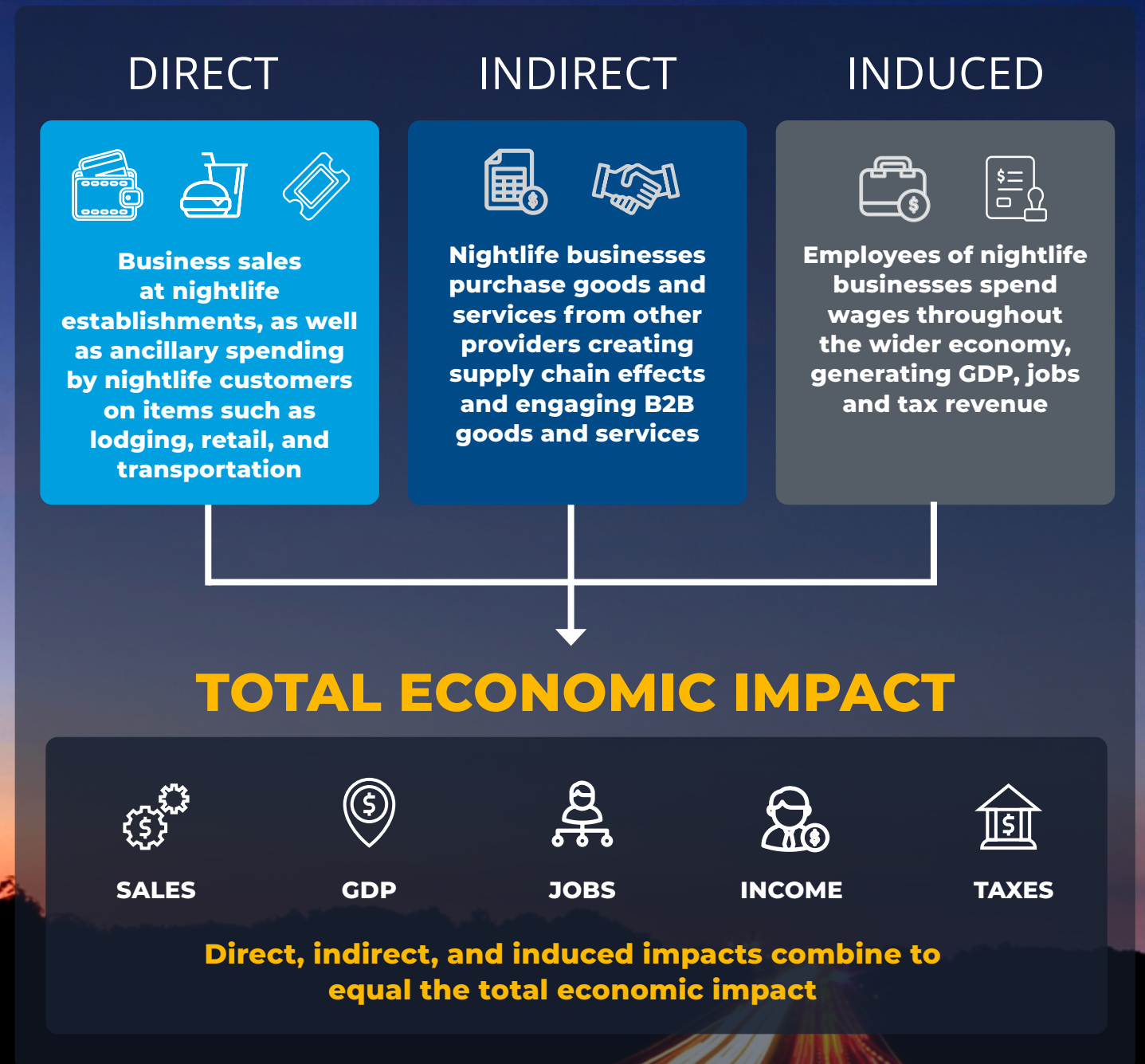
The modeling process begins with aligning the direct expenditure measurements with the related sectors in the model (e.g. bars, restaurants, retail, and recreation). The model is then run to trace the flow of these expenditures through the economy. In this process, the inter-relationships between consumers and industries generate each level of impact.

IMPLAN calculates three levels of impact – direct, indirect, and induced – for a broad set of indicators.

These include the following:

- Business sales (also called gross output)
- Household income (including wages and benefits)
- Employment
- Federal taxes
- State and local taxes

Economic Impacts Framework



Dallas Nightlife Economy

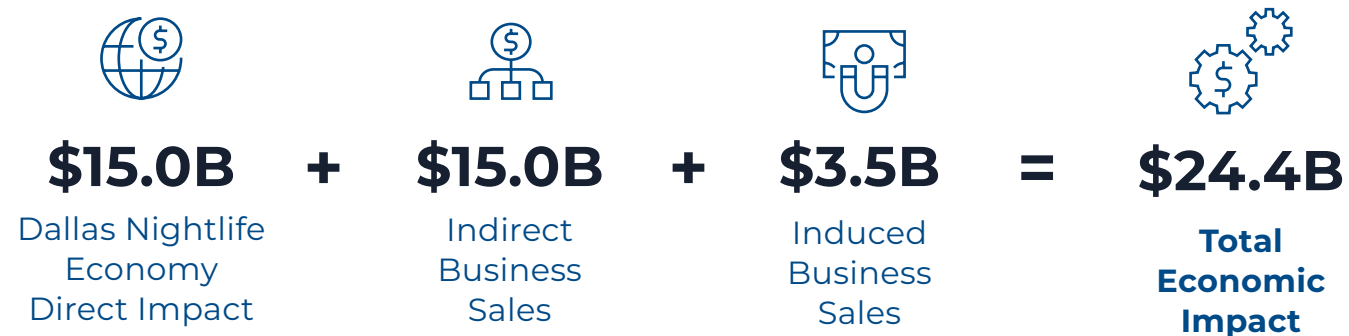
Economic Impact: Business Sales

Sales at establishments within the Dallas nightlife economy, along with ancillary spending by nightlife customers, generated a total economic impact of \$24.4 billion in 2023

The Dallas nightlife economy's direct impact of \$15.0 billion generated \$5.9 billion in indirect business sales and \$3.5 billion in induced business sales, resulting in a total economic impact of \$24.4 billion in 2023.

The food & beverage industry was the most-impacted industry with \$12.8 billion in total business sales in 2023. FIRE (finance, insurance, and real estate) and business services followed with \$2.8 billion and \$2.3 billion in total business sales, respectively.

Business Sales Impacts - Dallas Nightlife Economy (2023)



In 2023, the Dallas nightlife economy generated a **total economic impact of \$24.4 billion**

Dallas Nightlife Economy Business Sales Impacts by Industry, 2023 (\$ millions)

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$15,012.6	\$5,893.5	\$3,461.1	\$24,367.2
By industry				
Food & Beverage	\$12,384.9	\$124.7	\$257.7	\$12,767.3
Finance, Insurance and Real Estate	-	\$1,687.7	\$1,161.1	\$2,848.7
Business Services	-	\$1,946.7	\$327.1	\$2,273.8
Recreation and Entertainment	\$1,125.7	\$122.3	\$58.0	\$1,306.0
Retail Trade	\$764.0	\$86.7	\$276.6	\$1,127.3
Communications	-	\$440.0	\$168.1	\$608.1
Construction and Utilities	-	\$428.1	\$98.6	\$526.7
Gasoline Stations	\$496.0	\$3.3	\$17.0	\$516.3
Education and Health Care	-	\$12.5	\$501.6	\$514.1
Wholesale Trade	-	\$315.8	\$173.1	\$488.9
Other Transport	\$124.0	\$191.7	\$79.0	\$394.6
Personal Services	-	\$173.6	\$180.3	\$353.9
Manufacturing	-	\$178.1	\$58.9	\$237.0
Government	-	\$130.4	\$60.1	\$190.4
Lodging	\$118.0	\$0.6	\$0.8	\$119.4
Air Transport	-	\$23.3	\$25.6	\$48.9
Agriculture, Fishing, Mining	-	\$28.2	\$17.5	\$45.7

Source: Tourism Economics (2024)
Note: Totals may not sum due to rounding

Dallas Nightlife Economy

Economic Impact: Employment

The Dallas nightlife economy generated a total employment impact of more than 256,000 part-time and full-time jobs in Dallas in 2023

The total economic impact attributable to the Dallas nightlife economy in 2023 (including sales at nightlife establishments and ancillary spending by nightlife customers) supported more than 256,000 total part-time and full-time jobs in the regional economy, including approximately 211,000 direct jobs, 27,000 indirect jobs, and 19,000 induced jobs. The food and beverage industry was the most-impacted industry with approximately 191,000 total jobs. Recreation and entertainment and business services followed, with 17,000 and 12,000 total jobs, respectively.

**Dallas Nightlife Economy
Employment Impacts by Industry, 2023**
(number of part-time and full-time jobs)

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	210,727	26,919	18,684	256,330
By industry				
Food & Beverage	186,225	1,563	3,119	190,906
Recreation and Entertainment	14,870	1,267	601	16,738
Business Services	-	10,470	1,912	12,382
Retail Trade	5,932	716	2,337	8,984
Finance, Insurance and Real Estate	-	5,931	2,565	8,496
Other Transport	1,476	1,903	769	4,148
Education and Health Care	-	111	3,918	4,029
Personal Services	-	1,554	1,993	3,546
Wholesale Trade	-	1,025	458	1,482
Lodging	1,304	5	7	1,316
Gasoline Stations	921	25	128	1,073
Communications	-	685	296	981
Government	-	615	212	826
Construction and Utilities	-	545	183	728
Manufacturing	-	415	104	519
Air Transport	-	59	64	123
Agriculture, Fishing, Mining	-	32	20	52

Source: Tourism Economics (2024)
Note: Totals may not sum due to rounding



In 2023, the Dallas nightlife economy supported more than **256,000 total jobs** and 211,000 direct jobs



In 2023, the Dallas nightlife economy generated **\$8.3 billion in total labor income** and \$5.3 billion in direct labor income

Dallas Nightlife Economy Economic Impact: Labor Income

The Dallas nightlife economy generated \$8.3 billion in total labor income in Dallas in 2023

Sales at Dallas nightlife establishments and ancillary spending by nightlife customers generated \$5.3 billion in direct labor income, \$1.9 billion in indirect labor income, and \$1.1 billion in induced personal income, resulting in \$8.3 billion in total labor income in 2023. The food and beverage industry was the most-impacted industry with approximately \$4.7 billion in total labor income. Business services and recreation and entertainment followed, with \$1.1 billion and \$0.6 billion in total labor income, respectively.

Dallas Nightlife Economy Labor Income Impacts by Industry, 2023 (\$ millions)

	Direct Labor Income	Indirect Labor Income	Induced Labor Income	Total Labor Income
Total, all industries	\$5,289.6	\$1,940.1	\$1,061.1	\$8,290.8
By industry				
Food & Beverage	\$4,513.8	\$48.1	\$91.6	\$4,653.6
Business Services	\$0.0	\$977.8	\$155.5	\$1,133.3
Recreation and Entertainment	\$490.5	\$44.9	\$21.9	\$557.3
Finance, Insurance and Real Estate	\$0.0	\$336.0	\$185.9	\$521.9
Retail Trade	\$158.3	\$32.1	\$101.4	\$291.9
Education and Health Care	\$0.0	\$6.6	\$253.3	\$259.9
Personal Services	\$0.0	\$76.9	\$76.4	\$153.3
Wholesale Trade	\$0.0	\$101.4	\$51.8	\$153.1
Other Transport	\$42.1	\$74.4	\$29.4	\$145.9
Communications	\$0.0	\$77.7	\$35.1	\$112.8
Government	\$0.0	\$67.7	\$22.6	\$90.3
Construction and Utilities	\$0.0	\$58.1	\$15.8	\$73.9
Lodging	\$54.0	\$0.2	\$0.3	\$54.5
Manufacturing	\$0.0	\$29.0	\$7.8	\$36.8
Gasoline Stations	\$30.9	\$0.8	\$4.3	\$36.0
Air Transport	\$0.0	\$6.0	\$6.5	\$12.5
Agriculture, Fishing, Mining	\$0.0	\$2.5	\$1.6	\$4.0

Source: Tourism Economics (2024)
Note: Totals may not sum due to rounding

Dallas Nightlife Economy

Fiscal Impact: Tax Revenues

The Dallas nightlife economy's total economic impact of \$24.4 billion generated \$2.2 billion in total fiscal (tax) revenues in 2023, including approximately \$864.0 million in state and local tax revenues.

The total economic impact of the Dallas nightlife economy (including the impacts of sales at nightlife establishments and ancillary spending by nightlife customers) generated a total fiscal (tax) impact of \$2.2 billion in 2023.

Total federal taxes amounted to \$1.4 billion, including \$0.5 billion in personal income taxes, \$103.3 million in corporate taxes, \$50.5 million in indirect business taxes, and \$673.1 million in social insurance taxes.

Total state and local taxes amounted to \$864.0 million, including \$490.6 million in sales taxes, \$8.6 million in live social insurance taxes, \$59.2 million in excise taxes and fees, and \$305.6 million in property taxes in 2023.

Dallas Nightlife Economy Fiscal (Tax) Impacts, 2023 (\$ millions)

	Direct Taxes	Indirect & Induced Taxes	Total Taxes
Total Taxes	\$1,331.3	\$882.7	\$2,214.0
Federal	\$760.1	\$590.0	\$1,350.1
Personal income	\$347.9	\$175.3	\$523.2
Corporate	\$45.4	\$57.9	\$103.3
Indirect business	\$33.4	\$17.1	\$50.5
Social insurance	\$333.4	\$339.7	\$673.1
State and Local	\$571.2	\$292.7	\$864.0
Sales	\$324.5	\$166.0	\$490.6
Social insurance	\$5.4	\$3.2	\$8.6
Excise and fees	\$39.1	\$20.1	\$59.2
Property	\$202.2	\$103.5	\$305.6

Source: Tourism Economics (2024)
Note: Totals may not sum due to rounding

Dallas Nightlife Economy

Economic & Fiscal Impacts by Nightlife Sector

In addition to analyzing the economic impacts attributable to the Dallas nightlife sector as a whole, Tourism Economics also estimated the economic impacts of each of the five sectors comprising the Dallas nightlife economy.

- Restaurants & food service:** includes more than 5,500 full-service restaurants, limited/partial-service restaurants, food trucks, and cafes. The restaurants and food service sector generated a direct impact of \$10.1 billion (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$16.6 billion, supporting 197,000 total jobs and \$596.5 million in total state and local tax revenues.
- Bars:** includes more than 760 drinking establishments and nightclubs throughout Dallas. The bars sector generated a direct impact of \$3.8 billion (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$6.2 billion, supporting 50,000 total jobs and \$215.6 million in total state and local tax revenues.
- Arts and Culture:** includes 83 performing arts venues, movie theaters, galleries, and museums. The arts and culture sector generated a direct impact of \$261.0 million (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$415.0 million, supporting 2,500 total jobs and \$12.3 million in total state and local tax revenues.
- Venues:** includes approximately 100 concert and live entertainment venues, independent venues (not including performing arts venues included in the Arts and Culture sector), and informal performance spaces. The venues sector generated a direct impact of \$313.4 million (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$511.6 million, supporting 3,400 total jobs and \$13.6 million in total state and local tax revenues.
- Sports and Recreation:** includes more than 80 recreation venues such as bowling alleys, arcades, family entertainment centers, amusement venues, and professional, spectator, and recreational participatory sports throughout Dallas. The sports and recreation sector generated a direct impact of \$440.0 million (including business sales and ancillary spending by nightlife customers). This direct impact generated a total economic impact of \$721.4 million, supporting 4,000 total jobs and \$26.0 million in total state and local tax revenues.

Figure E2: Dallas Nightlife Economy
Summary Economic Impacts by Nightlife Sector



Source: Tourism Economics (2024)

Note: The direct impacts include business sales and ancillary spending by nightlife customers within each nightlife sector.

ENTERTAINMENT DISTRICT IMPACTS



Entertainment District Impacts

Background

Tourism Economics estimated the economic impacts of the nightlife economy in the six Dallas entertainment districts listed below. The research team coordinated with local stakeholders within the nightlife economy to identify entertainment districts that have substantial levels of nightlife activity.

- Bishop Arts
- Deep Ellum
- Downtown Dallas
- Greenville
- Oak Lawn / Cedar Springs
- Uptown / Harwood District / Victory Park

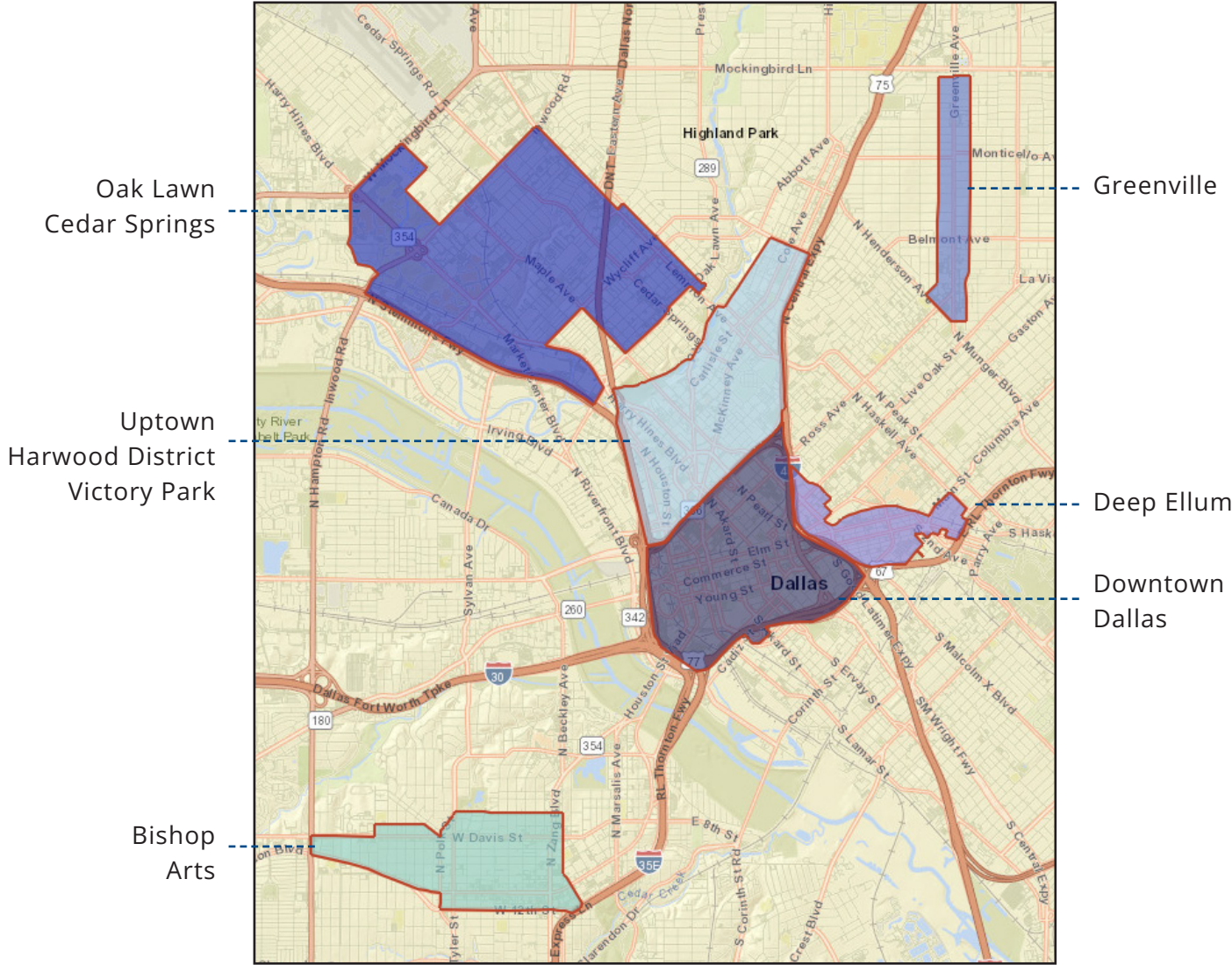
For each entertainment district, the research team compiled business-level data on employment and business sales in 2023 and estimated summary economic impacts of the nightlife economy in each district. Similar to the analysis of the Dallas nightlife economy, the analysis of the nightlife economy in each entertainment district considered business activity that occurred between the hours of 6 p.m. and 6 a.m. The table below summarizes the number of nightlife establishments within each identified district, as well as the total employment impact, total economic impact, and total state and local tax revenues attributable to the nightlife economy.

Dallas Nightlife Summary Economic and Fiscal (Tax) Impacts, 2023
by Entertainment District (number of establishments, jobs and \$ millions)

	Number of Establishments	Total Employment Impact	Total Economic Impact (\$ millions)	Total State & Local Taxes (\$ millions)
Bishop Arts	100	2,464	\$323.7	\$11.6
Deep Ellum	92	2,308	\$343.5	\$11.9
Downtown Dallas	225	12,972	\$967.7	\$35.8
Greenville	68	1,583	\$186.4	\$7.1
Oak Lawn / Cedar Springs	118	4,394	\$527.6	\$18.3
Uptown / Harwood District / Victory Park	194	11,597	\$1,165.3	\$44.3

Sources: Tourism Economics (2024), Bureau of Labor Statistics (2024), U.S. Census Bureau (2024), DataAxle (2024)
Note: Nightlife impacts represent estimated business activity between the hours of 6 p.m. and 6 a.m.

Dallas Nightlife Economy Select Dallas Entertainment Districts



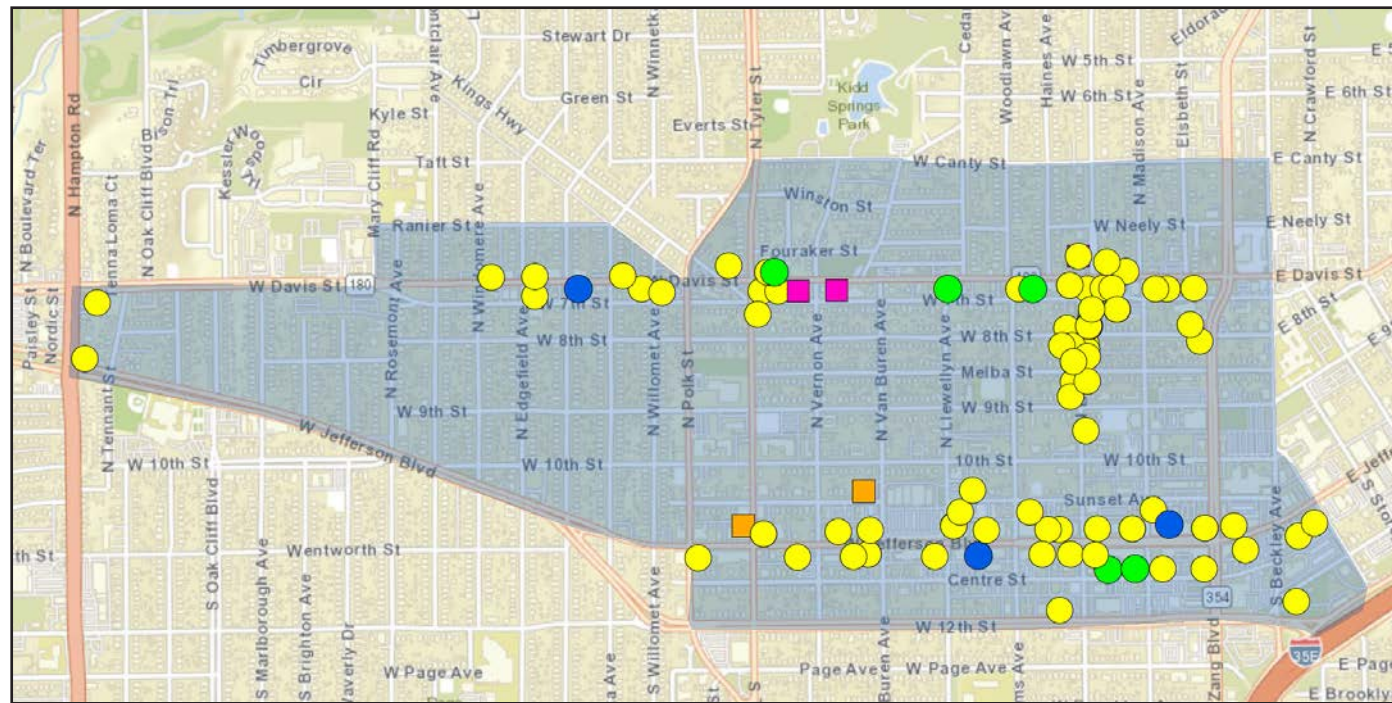
Source: Tourism Economics

Entertainment District Impacts

Bishop Arts

The Bishop Arts entertainment district had a total of 100 nightlife businesses and establishments with approximately \$161.7 million in sales and 1,250 employees in 2023. The accompanying table provides summary data across the five sectors that comprise the nightlife economy.

Nightlife Economy Businesses Bishop Arts Entertainment District



- Arts & Culture
- Bars
- Sports & Recreation
- Restaurants & Food Service
- Venues

Nightlife businesses and establishments in Bishop Arts generated an estimated \$161.7 million in sales in 2023. Nightlife customers spent an additional \$35.7 million in ancillary spending on items such as transportation (including gasoline, ride shares, and public transportation), lodging, and retail purchases. The direct impact of the nightlife economy in Bishop Arts amounted to \$197.3 million, supporting approximately 1,900 employees.

Nightlife Economy Business Data Bishop Arts Entertainment District

Bishop Arts	Establishments	Employees	Sales (\$ millions)
Arts & culture	3	15	\$2.2
Bars	6	72	\$15.7
Sports & recreation	4	18	\$1.8
Restaurants & food service	90	1,152	\$140.5
Venues	2	21	\$1.5
Subtotal, nightlife sectors	100	1,247	\$161.7
Ancillary spending		675	\$35.7
Direct impact of nightlife economy		1,922	\$197.3

Sources: Tourism Economics (2024), DataAxle (2024)

Note: Sales represent estimated business activity between the hours of 6 p.m. and 6 a.m.

Summary Economic Impacts of the Nightlife Economy in Bishop Arts (2023)

In the Bishop Arts entertainment district, the nightlife economy's direct impact of \$197.3 million (including nightlife business sales and ancillary spending by nightlife customers) generated a total economic impact of \$323.7 million in 2023. This total economic impact supported 2,500 total jobs and generated \$11.6 million in state and local tax revenues.



\$197.3M

**Direct
Impact of
Nightlife
Economy**



\$323.7M

**Total
Economic
Impact**



2,500

**Total
Jobs
Generated**



\$11.6M

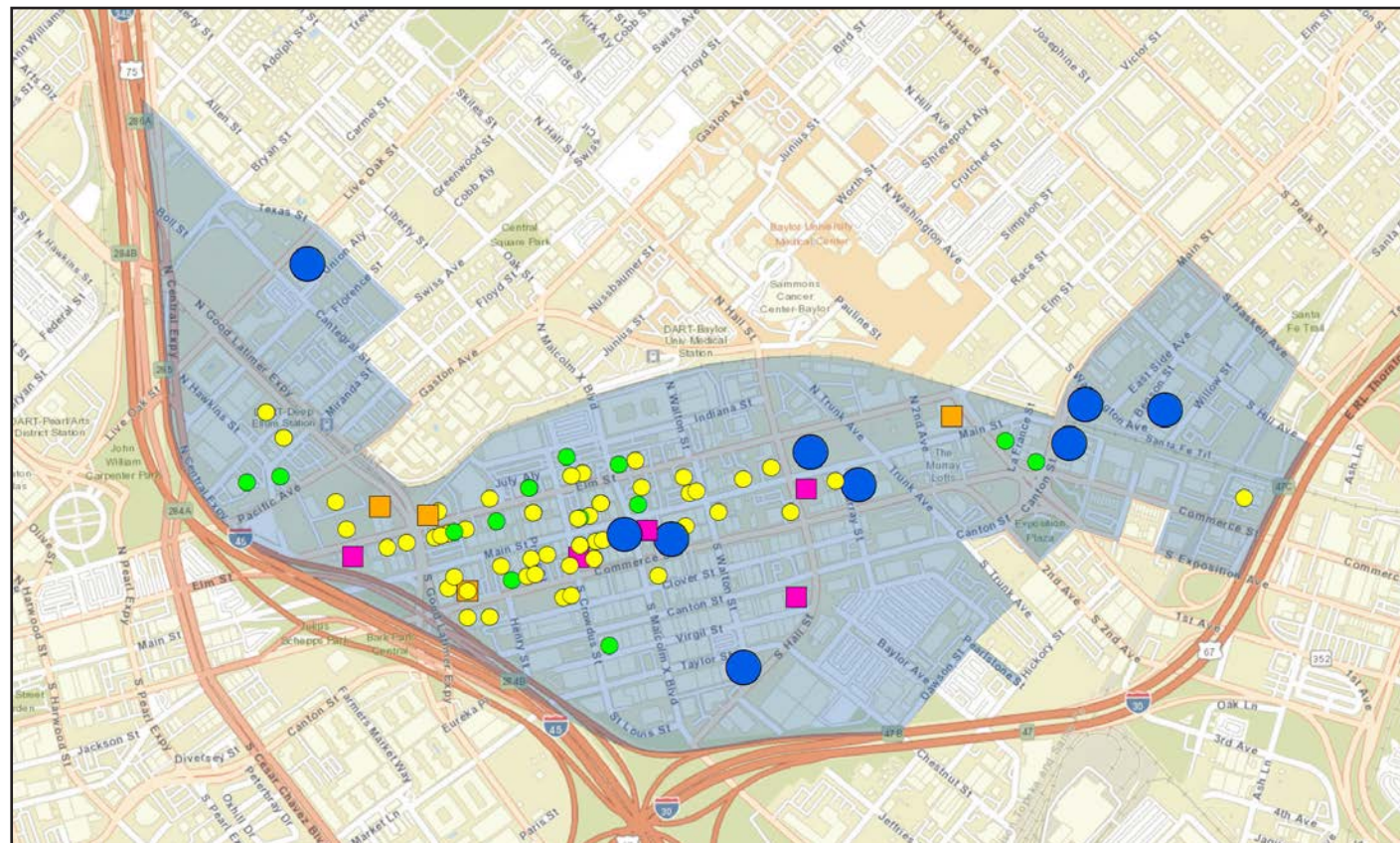
**Total
State & Local
Tax Revenues**

Entertainment District Impacts

Deep Ellum

The Deep Ellum entertainment district had a total of 92 nightlife businesses and establishments with approximately \$177.6 million in sales and 1,220 employees in 2023. The accompanying table provides summary data across the five sectors that comprise the nightlife economy.

Figure: Nightlife Economy Businesses
Deep Ellum Entertainment District



- Arts & culture
- Bars
- Sports & Recreation
- Restaurants & Food Service
- Venues

Nightlife businesses and establishments in Deep Ellum generated an estimated \$177.6 million in sales in 2023. Nightlife customers spent an additional \$33.1 million in ancillary spending on items such as transportation (including gasoline, ride shares, and public transportation), lodging, and retail purchases. The direct impact of the nightlife economy in Deep Ellum amounted to \$210.7 million, supporting approximately 1,800 employees.

Nightlife Economy Business Data Deep Ellum Entertainment District

Deep Ellum	Establishments	Employees	Sales (\$ millions)
Arts & culture	9	49	\$5.8
Bars	18	221	\$49.0
Sports & recreation	6	48	\$7.0
Restaurants & food service	70	1,065	\$114.2
Venues	4	83	\$1.7
Subtotal, nightlife sectors	92	1,224	\$177.6
Ancillary spending		565	\$33.1
Direct impact of nightlife economy		1,789	\$210.7

Sources: Tourism Economics (2024), DataAxle (2024)

Note: Sales represent estimated business activity between the hours of 6 p.m. and 6 a.m.

Summary Economic Impacts of the Nightlife Economy in Deep Ellum (2023)

In the Deep Ellum entertainment district, the nightlife economy's direct impact of \$210.7 million (including nightlife business sales and ancillary spending by nightlife customers) generated a total economic impact of \$343.5 million in 2023. This total economic impact supported 2,300 total jobs and generated \$11.9 million in state and local tax revenues.



\$210.7M

**Direct
Impact of
Nightlife
Economy**



\$343.5M

**Total
Economic
Impact**



2,300

**Total
Jobs
Generated**



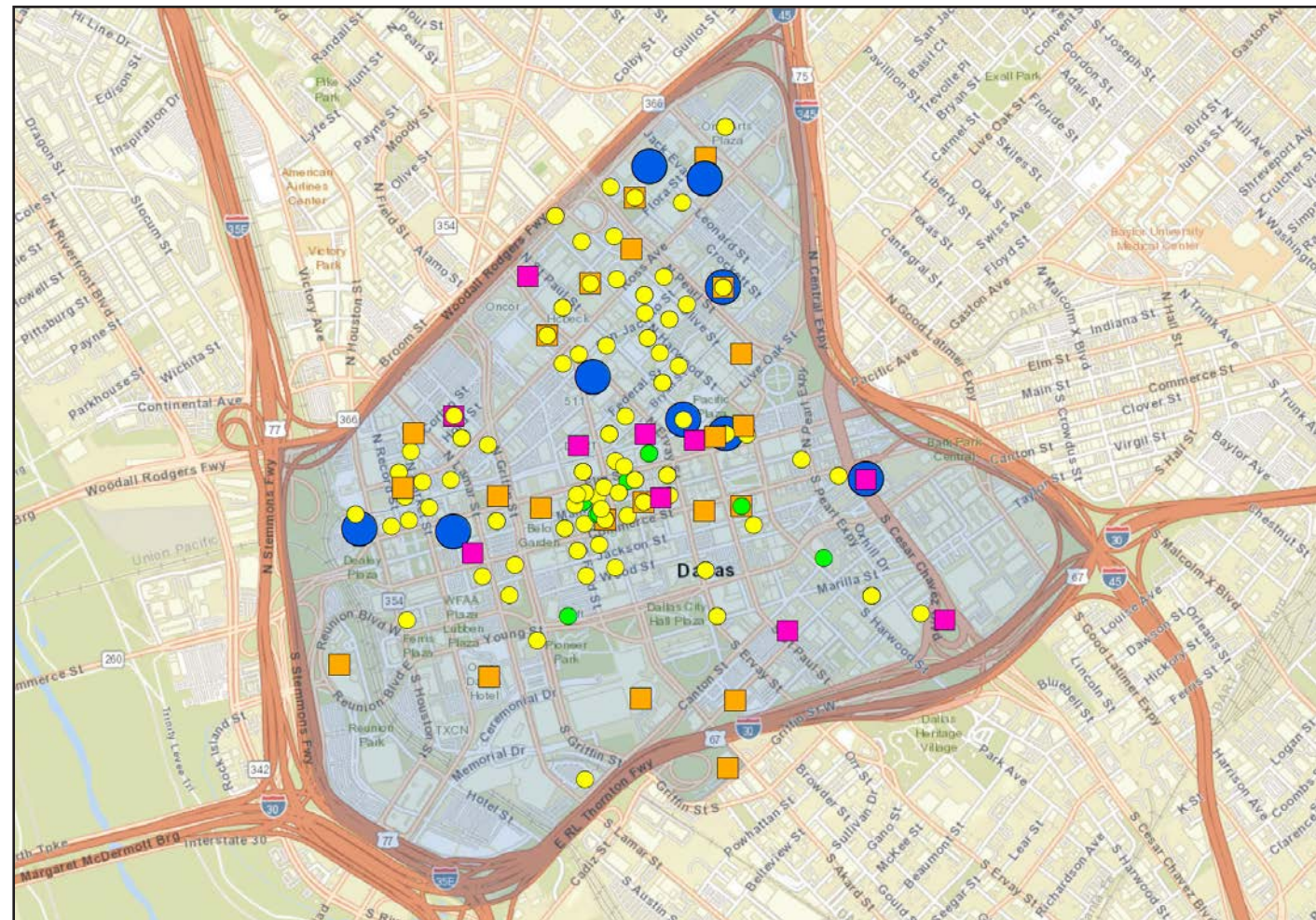
\$11.9M

**Total
State & Local
Tax Revenues**

Entertainment District Impacts Downtown Dallas

The Downtown Dallas entertainment district had a total of 225 nightlife businesses and establishments with approximately \$490.5 million in sales and 7,200 employees in 2023. The accompanying table provides summary data across the five sectors that comprise the nightlife economy.

Nightlife Economy Businesses Downtown Dallas Entertainment District



- Arts & culture
- Bars
- Sports & Recreation
- Restaurants & Food Service
- Venues

Nightlife businesses and establishments in Downtown Dallas generated an estimated \$490.5 million in sales in 2023. Nightlife customers spent an additional \$118.0 million in ancillary spending on items such as transportation (including gasoline, ride shares, and public transportation), lodging, and retail purchases. The direct impact of the nightlife economy in Downtown Dallas amounted to \$608.6 million, supporting approximately 10,000 employees.

Nightlife Economy Business Data Downtown Dallas Entertainment District

Downtown Dallas	Establishments	Employees	Sales (\$ millions)
Arts & culture	12	328	\$35.4
Bars	14	296	\$47.0
Sports & recreation	12	229	\$8.4
Restaurants & food service	165	2,157	\$257.3
Venues	22	4,181	\$142.3
Subtotal, nightlife sectors	225	7,191	\$490.5
Ancillary spending		3,022	\$118.0
Direct impact of nightlife economy		10,213	\$608.6

Sources: Tourism Economics (2024), DataAxle (2024)

Note: Sales represent estimated business activity between the hours of 6 p.m. and 6 a.m.

Summary Economic Impacts of the Nightlife Economy in Downtown Dallas (2023)

In the Downtown Dallas entertainment district, the nightlife economy's direct impact of \$608.6 million (including nightlife business sales and ancillary spending by nightlife customers) generated a total economic impact of \$967.7 million in 2023. This total economic impact supported 13,000 total jobs and generated \$35.8 million in state and local tax revenues.



\$608.6M

**Direct
Impact of
Nightlife
Economy**



\$967.7M

**Total
Economic
Impact**



13,000

**Total
Jobs
Generated**



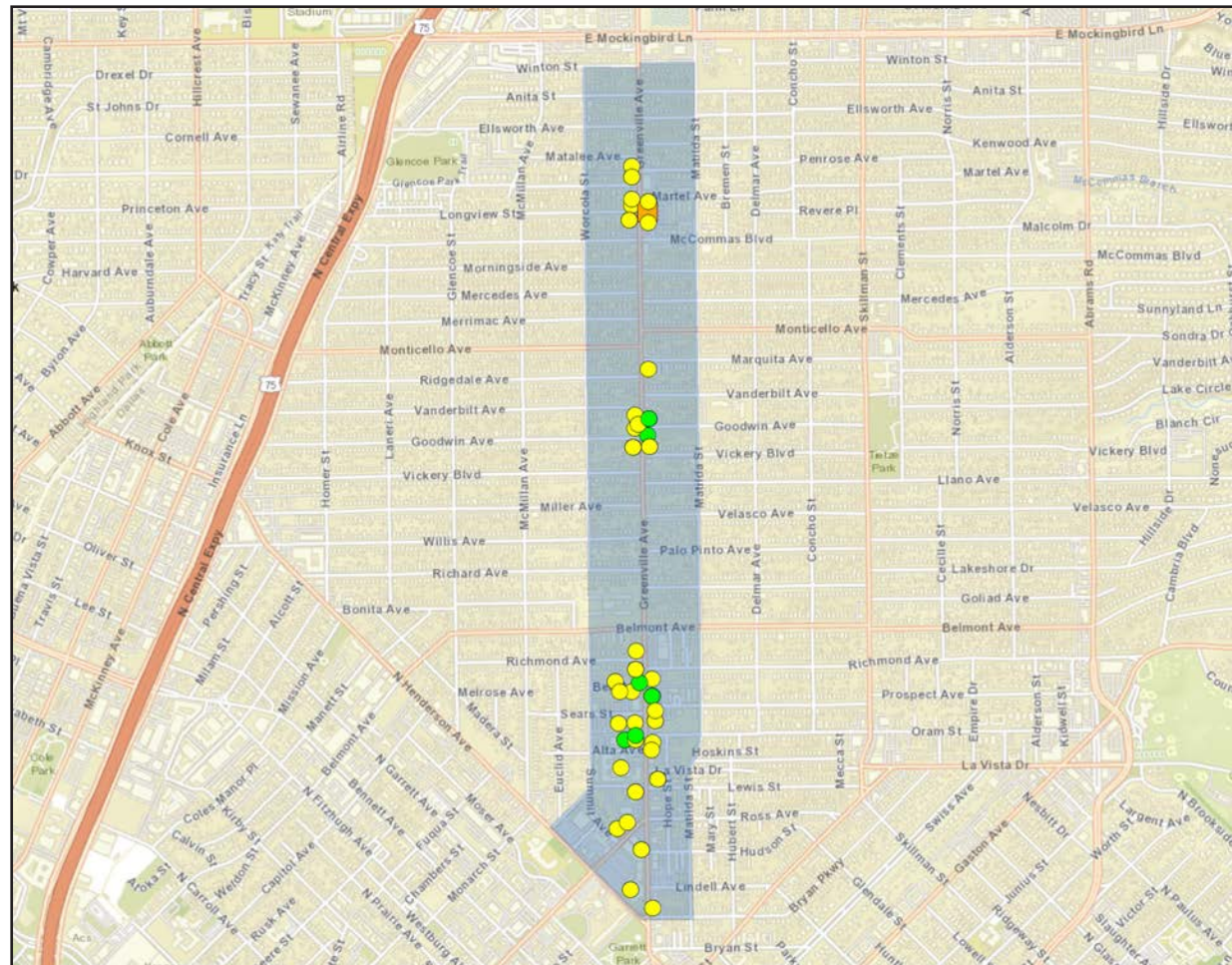
\$35.8M

**Total
State & Local
Tax Revenues**

Entertainment District Impacts Greenville

The Greenville entertainment district had a total of 68 nightlife businesses and establishments with approximately \$99.3 million in sales and 1,000 employees in 2023. The accompanying table provides summary data across the five sectors that comprise the nightlife economy.

Nightlife Economy Businesses Greenville Entertainment District



- Arts & culture
- Bars
- Sports & Recreation
- Restaurants & Food Service
- Venues

Nightlife businesses and establishments in Greenville generated an estimated \$99.3 million in sales in 2023. Nightlife customers spent an additional \$17.0 million in ancillary spending on items such as transportation (including gasoline, ride shares, and public transportation), lodging, and retail purchases. The direct impact of the nightlife economy in Greenville amounted to \$116.3 million, supporting approximately 1,300 employees.

Nightlife Economy Business Data Greenville Entertainment District

Greenville	Establishments	Employees	Sales (\$ millions)
Bars	9	105	\$21.1
Restaurants & food service	58	886	\$75.6
Venues	1	40	\$2.7
Subtotal, nightlife sectors	68	1,031	\$99.3
Ancillary spending		299	\$17.0
Direct impact of nightlife economy		1,330	\$116.3

Sources: Tourism Economics (2024), DataAxle (2024)

Note: Sales represent estimated business activity between the hours of 6 p.m. and 6 a.m.

Summary Economic Impacts of the Nightlife Economy in Greenville (2023)

In the Greenville entertainment district, the nightlife economy's direct impact of \$116.3 million (including nightlife business sales and ancillary spending by nightlife customers) generated a total economic impact of \$186.4 million in 2023. This total economic impact supported 1,600 total jobs and generated \$7.1 million in state and local tax revenues.



\$116.3M

**Direct
Impact of
Nightlife
Economy**



\$186.4M

**Total
Economic
Impact**



1,600

**Total
Jobs
Generated**



\$7.1M

**Total
State & Local
Tax Revenues**

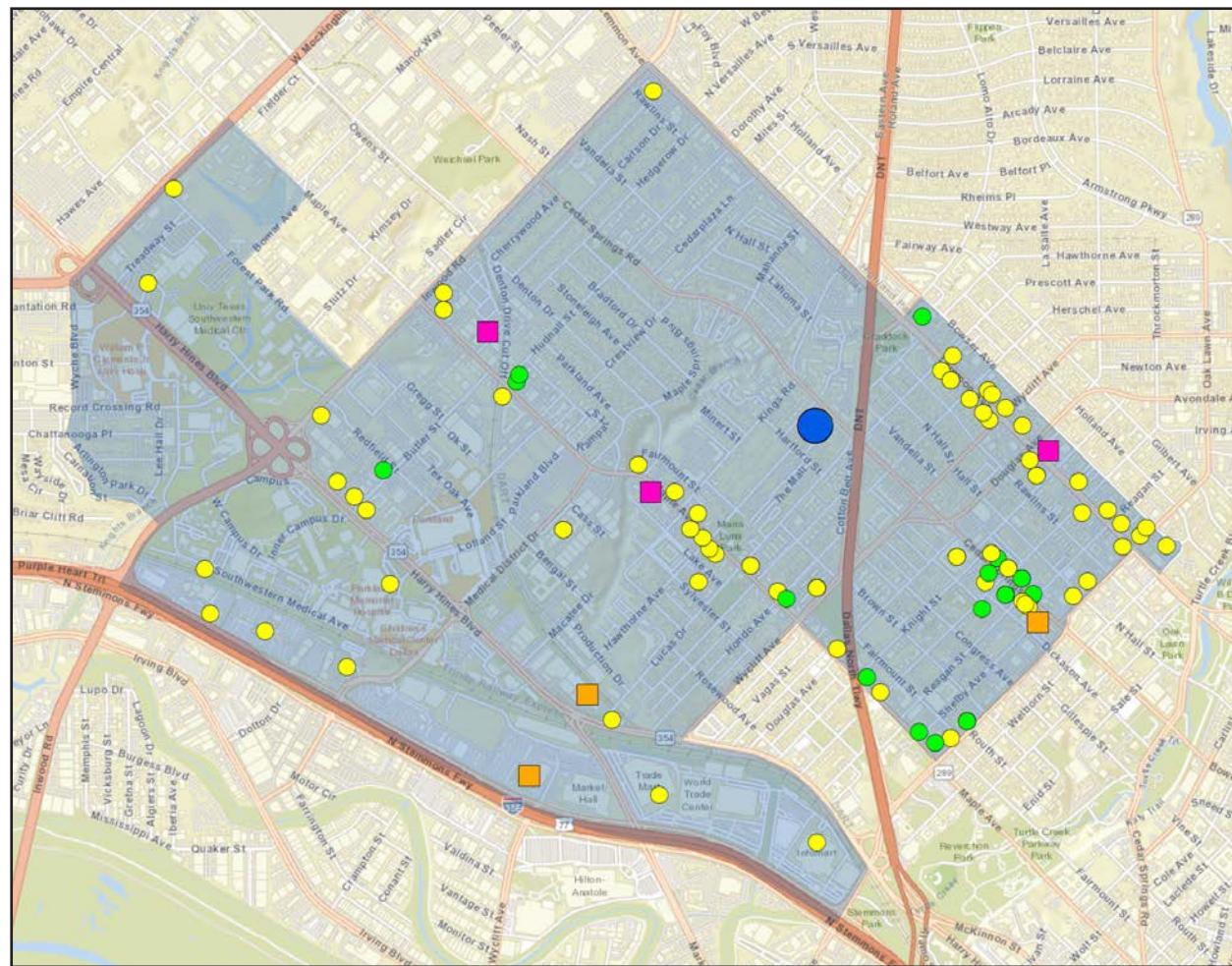
Entertainment District Impacts

Oak Lawn / Cedar Springs

The Oak Lawn / Cedar Springs entertainment district had a total of 118 nightlife businesses and establishments with approximately \$265.2 million in sales and 2,500 employees in 2023. The accompanying table provides summary data across the five sectors that comprise the nightlife economy.

Nightlife Economy Businesses

Oak Lawn / Cedar Springs Entertainment District



- Arts & culture
- Bars
- Sports & Recreation
- Restaurants & Food Service
- Venues

Nightlife businesses and establishments in Oak Lawn/Cedar Springs generated an estimated \$265.2 million in sales in 2023. Nightlife customers spent an additional \$58.4 million in ancillary spending on items such as transportation (including gasoline, ride shares, and public transportation), lodging, and retail purchases. The direct impact of the nightlife economy in Oak Lawn/Cedar Springs amounted to \$323.6 million, supporting approximately 3,500 employees.

Figure: Nightlife Economy Business Data
Oak Lawn / Cedar Springs Entertainment District

Oak Lawn / Cedar Springs	Establishments	Employees	Sales (\$ millions)
Arts & culture	1	2	\$0.3
Bars	20	291	\$55.8
Sports & recreation	3	33	\$4.4
Restaurants & food service	91	1,842	\$186.3
Venues	3	360	\$18.5
Subtotal, nightlife sectors	118	2,528	\$265.2
Ancillary spending		986	\$58.4
Direct impact of nightlife economy		3,514	\$323.6

Sources: Tourism Economics (2024), DataAxle (2024)
 Note: Sales represent estimated business activity between the hours of 6 p.m. and 6 a.m.

Summary Economic Impacts of the Nightlife Economy in Oak Lawn / Cedar Springs (2023)

In the Oak Lawn/Cedar Springs entertainment district, the nightlife economy's direct impact of \$323.6 million (including nightlife business sales and ancillary spending by nightlife customers) generated a total economic impact of \$527.6 million in 2023. This total economic impact supported 4,400 total jobs and generated \$18.3 million in state and local tax revenues.



\$323.6M

**Direct
Impact of
Nightlife
Economy**



\$527.6M

**Total
Economic
Impact**



4,400

**Total
Jobs
Generated**



\$18.3M

**Total
State & Local
Tax Revenues**

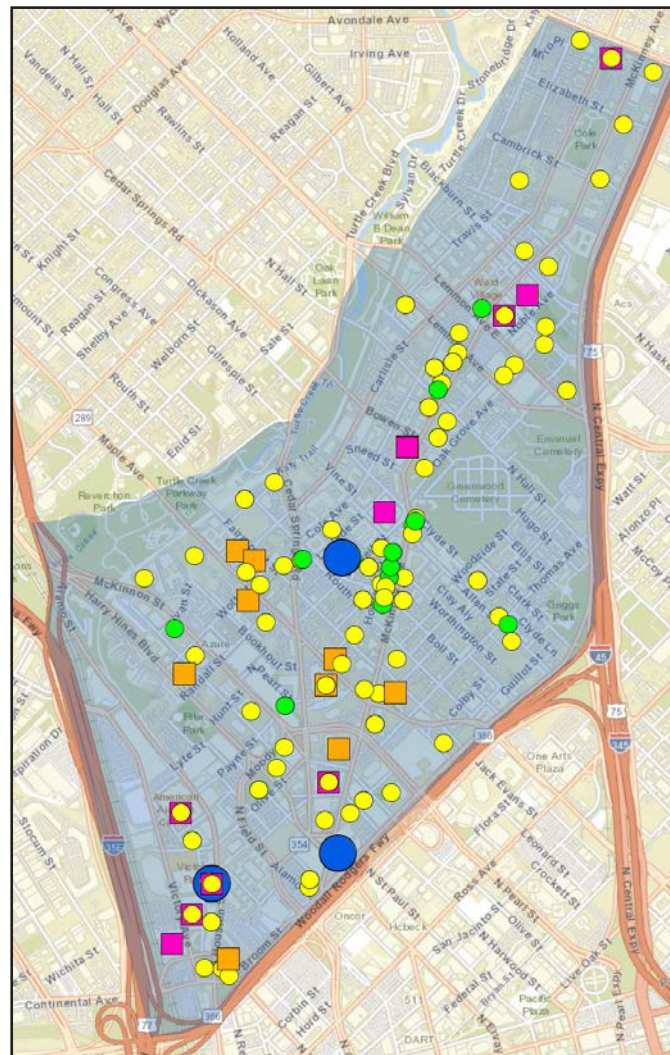
Entertainment District Impacts

Uptown / Harwood District / Victory Park

The Uptown / Harwood District / Victory Park entertainment district had a total of 194 nightlife businesses and establishments with approximately \$553.7 million in sales and 6,500 employees in 2023. The accompanying table provides summary data across the five sectors that comprise the nightlife economy.

Nightlife Economy Businesses

Uptown / Harwood District / Victory Park Entertainment District



- Arts & culture
- Bars
- Sports & Recreation
- Restaurants & Food Service
- Venues

Nightlife businesses and establishments in Uptown/Harwood District/Victory Park generated an estimated \$553.7 million in sales in 2023. Nightlife customers spent an additional \$144.1 million in ancillary spending on items such as transportation (including gasoline, ride shares, and public transportation), lodging, and retail purchases. The direct impact of the nightlife economy in Uptown/Harwood District/Victory Park amounted to \$697.7 million, supporting approximately 9,200 employees.

Nightlife Economy Business Data

Uptown / Harwood District / Victory Park Entertainment District

Uptown / Harwood District / Victory Park	Establishments	Employees	Sales (\$ millions)
Arts & culture	3	30	\$4.7
Bars	22	188	\$51.7
Sports & recreation	11	2,152	\$177.2
Restaurants & food service	148	3,022	\$251.2
Venues	10	1,088	\$68.9
Subtotal, nightlife sectors	194	6,480	\$553.7
Ancillary spending		2,723	\$144.1
Direct impact of nightlife economy		9,203	\$697.7

Sources: Tourism Economics (2024), DataAxle (2024)

Note: Sales represent estimated business activity between the hours of 6 p.m. and 6 a.m.

Summary Economic Impacts of the Nightlife Economy in Uptown / Harwood District / Victory Park (2023)

In the Uptown/Harwood District/Victory Park entertainment district, the nightlife economy's direct impact of \$697.7 million (including nightlife business sales and ancillary spending by nightlife customers) generated a total economic impact of \$1.2 billion in 2023. This total economic impact supported 12,000 total jobs and generated \$44.3 million in state and local tax revenues.



\$697.7M

**Direct
Impact of
Nightlife
Economy**



\$1,165.3M

**Total
Economic
Impact**



12,000

**Total
Jobs
Generated**



\$44.3M

**Total
State & Local
Tax Revenues**

NIGHTLIFE ECONOMY PERSPECTIVES



Nightlife Economy Perspectives

Background

As part of the research project, Tourism Economics distributed surveys and conducted interviews with nightlife stakeholders, including nightlife consumers, business owners, employees, professionals, and community members and leaders. The survey responses and interviews provided key perspectives on the current state of the Dallas nightlife economy, as well as key issues and factors facing the industry.

- Surveys of Dallas nightlife consumers, including residents living in Dallas, local residents living outside Dallas, and non-local visitors.
- Surveys of Dallas nightlife professionals, including owners or operators of nightlife establishments, artists or entertainers, and employees and nightlife establishments
- Interviews with nightlife stakeholders, including owners or operators of nightlife establishments, public officials, policymakers, developers, activists, and community members



Dallas Nightlife Economy

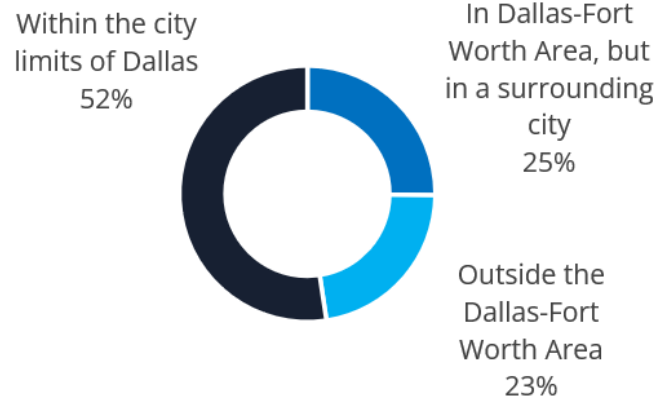
Survey of Nightlife Consumers

Where are consumers coming from?

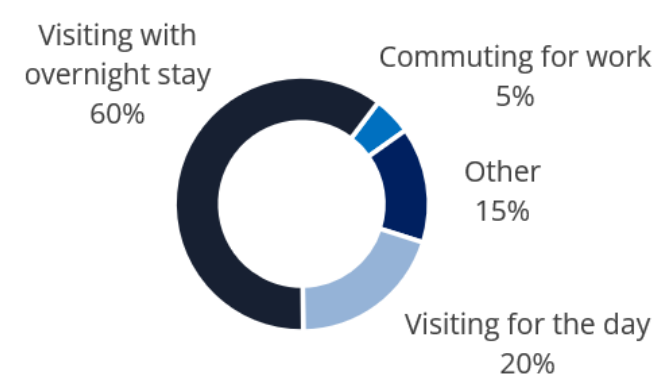
Consumer origin: More than half (52%) of surveyed consumers lived within the city limits of Dallas, while approximately one-quarter (25%) of consumers lived in the Dallas-Forth Worth Area, but in a surrounding city outside Dallas. The remaining 23% of consumers were visitors who originated from outside the Dallas-Forth Worth area. Of the non-local visitors from outside the Dallas-Forth Worth Area, approximately 60% were overnight visitors, while 20% were day visitors. Nearly five percent were commuting for work, while the remaining 15% were "other" types of

Dallas Nightlife Consumers (Origin and Reason for Visit)

Where do consumers live?



Non-locals: reason for visiting Dallas



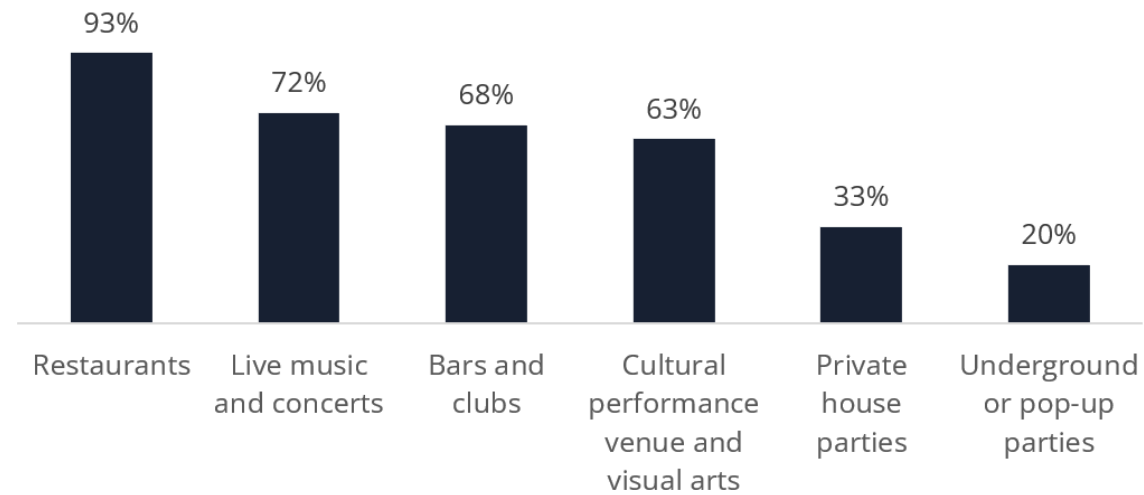
Source: Tourism Economics (2024)

How do consumers participate in the Dallas nightlife?

Types of establishments: Dallas nightlife consumers most commonly frequented restaurants (93%), live music and concerts (72%), bars and clubs (68%), and cultural performance venues and visual arts (63%). A considerably lower portion of nightlife consumers indicated they frequent private house parties (33%) and underground or pop-up parties (20%)

Dallas Nightlife Consumers

(Types of establishments frequented - multiple options permitted)

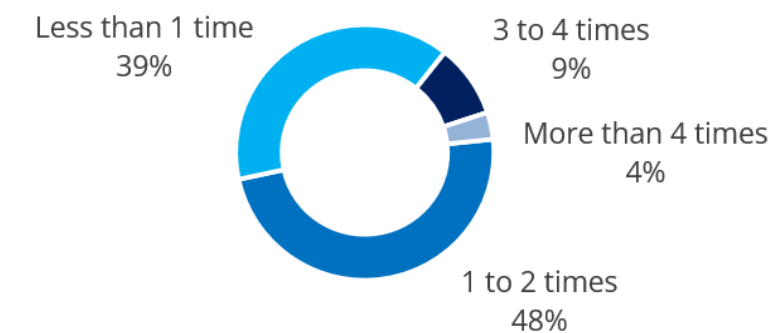


Source: Tourism Economics (2024)

Frequency of going out at night: Nearly half (48%) of consumers surveyed indicated they go out an average of one to two times per week. Approximately 39% of consumers indicated they go out less than once a week. Nearly 9% of consumers go out three to four times a week, and just four percent go out more than four times a week.

Dallas Nightlife Consumers

(Frequency of going out, average per week)

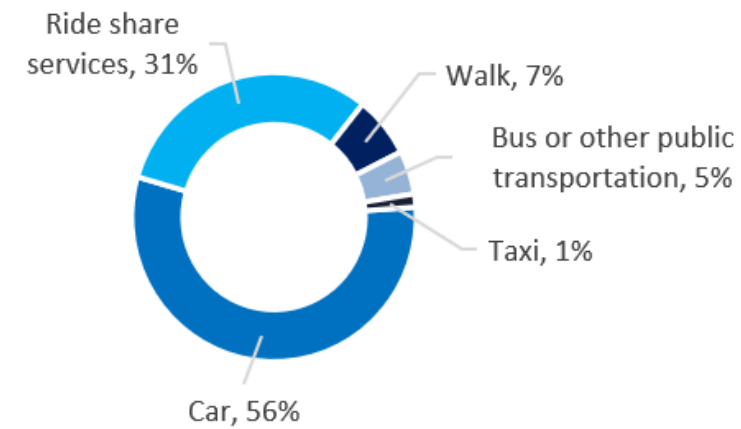


Source: Tourism Economics (2024)

Mode of transportation: The majority of consumers (56%) drive a car when participating in nightlife activities. Nearly one-third of consumers (31%) use ride share services like Uber or Lyft. A significantly lower portion of consumers either walk (7%), use bus or other public transportation (5%) or take a taxi (1%) when going out at night in Dallas.

Dallas Nightlife Consumers

(Mode of transportation used when going out at night)

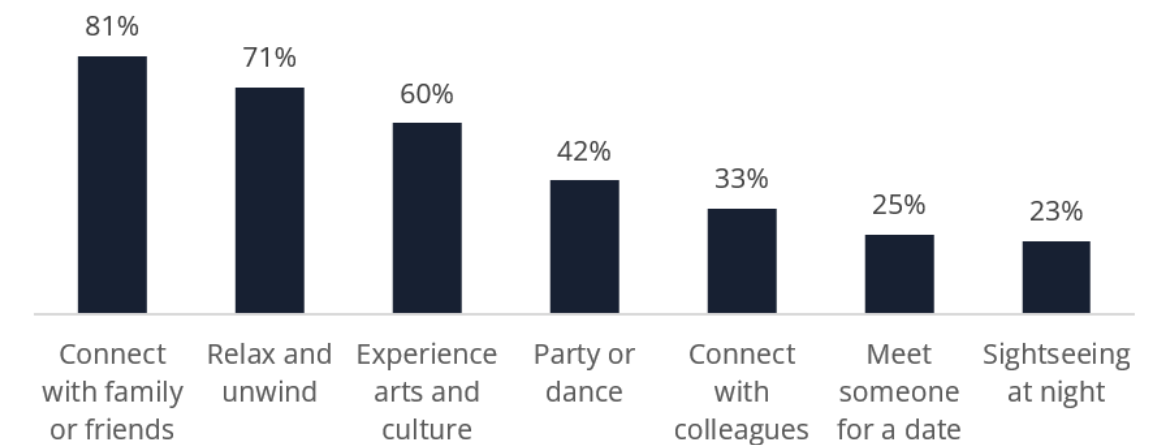


Source: Tourism Economics (2024)

Reason for going out: Nearly all consumers (81%) indicated they go out at night to connect with family or friends, while nearly three-quarters indicated they go out to relax and unwind, and 60% go out to experience arts and culture.

Dallas Nightlife Consumers

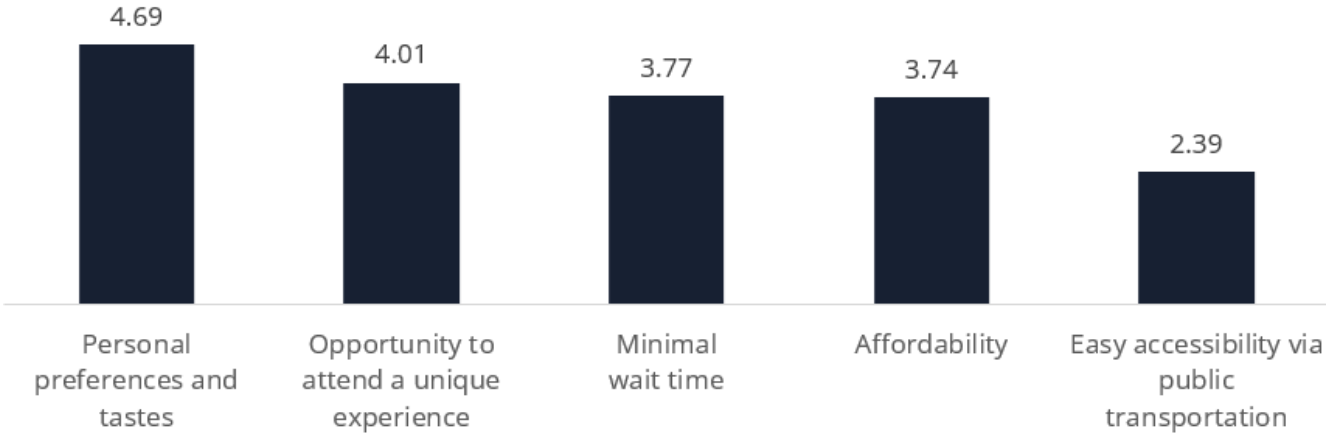
(Reasons for going out at night - multiple options permitted)



Source: Tourism Economics (2024)

Factors that influence consumers' choice of nightlife activities: The survey asked consumers to indicate (on a scale of one to five) how certain factors influence their choice of nightlife activities. Personal preferences and tastes ranked as the top factor, with an average score of 4.69. Opportunity to attend a unique experience was the only other factor that had an average score above four (4.01). Minimal wait time (3.77), affordability (3.74), and easy accessibility via public transportation (2.39) scored relatively low compared to personal preferences and tastes.

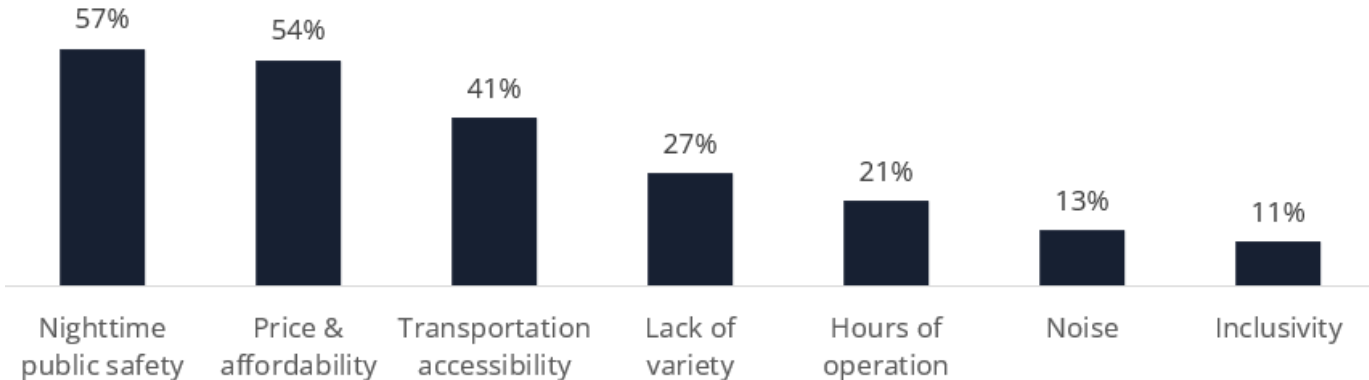
Dallas Nightlife Consumers
(How do factors influence consumers' choice of nightlife activities - Scale of 1 to 5)



Source: Tourism Economics (2024)

Challenges consumers see in nightlife activities in Dallas: The survey asked consumers to indicate challenges they see in nightlife activities in Dallas. The top two responses were public safety and price/affordability, with 57% and 54% of consumers, respectively, choosing these options. Transportation accessibility (41%), lack of variety (27%), and hours of operation (21%) followed. Noise and inclusivity ranked last, with just 13% and 11% of consumers, respectively, indicating they viewed them as challenges in nightlife activities.

Dallas Nightlife Consumers
(Challenges consumers see in the Dallas nightlife economy - multiple options permitted)



Source: Tourism Economics (2024)



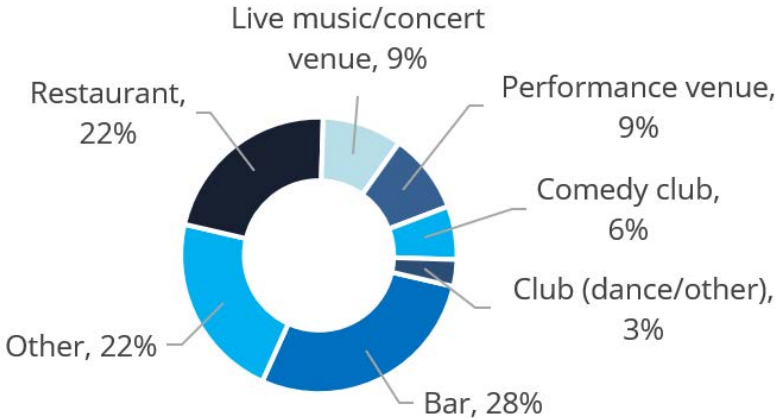
Dallas Nightlife Economy

Survey of Nightlife Business Owners, Operators, and Managers

What types of nightlife establishments are represented by survey responses?

Type of nightlife establishment: Approximately 28% of survey respondents indicated they manage bars, while 22% of respondents indicated they manage restaurants (including full-service and limited-service restaurants). Nearly 22% of respondents managed "other" nightlife establishments, including cultural centers, non-profit organizations, entertainment production companies, and arts facilities. Live music/concert venues (9%), performance venues (9%), comedy clubs (6%), and dance/other clubs (3%) were owned, operated, or managed by a significantly lower share of survey respondents compared to restaurants and bars.

Dallas Nightlife Business Owners, Operators, and Managers
(Type of nightlife establishment)

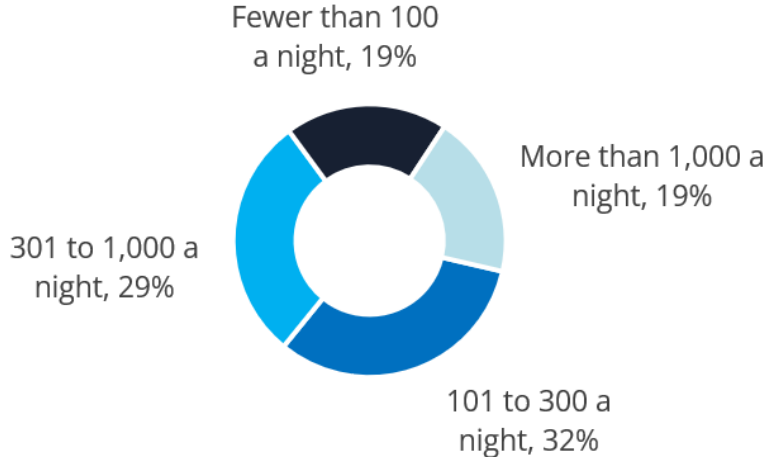


Source: Tourism Economics (2024)

How many customers do establishments welcome on an average night?

Number of customers on an average night: Survey respondents were somewhat evenly distributed across the range of choices for the number of customers at their nightlife establishments on an average evening. Nearly one-fifth (19%) of respondents indicated their nightlife establishment welcomes fewer than 100 customers a night, while 32% of respondents indicated they welcome between 101 and 300 customers a night. More than 29% of respondents welcome 301 to 1,000 customers on an average night, while 19% of respondents welcome more than 1,000 customers a night.

Dallas Nightlife Business Owners, Operators, and Managers
(Number of customers on an average night)

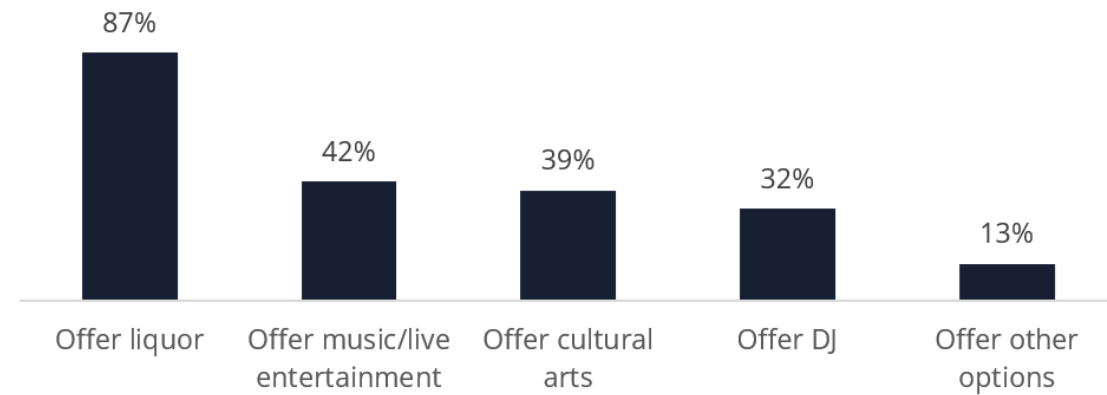


Source: Tourism Economics (2024)

What do nightlife establishments offer?

Offerings at nightlife establishments: Nearly all respondents (87%) indicated they offer liquor at their nightlife establishment. More than 42% of respondents offer some sort of music or live entertainment, 39% offer cultural arts, and 32% of respondents offer a DJ at their nightlife establishments. Approximately 13% indicated they offer other options, including drag shows and curated events.

Dallas Nightlife Business Owners, Operators, and Managers
(Types of offerings at nightlife establishments - multiple options permitted)

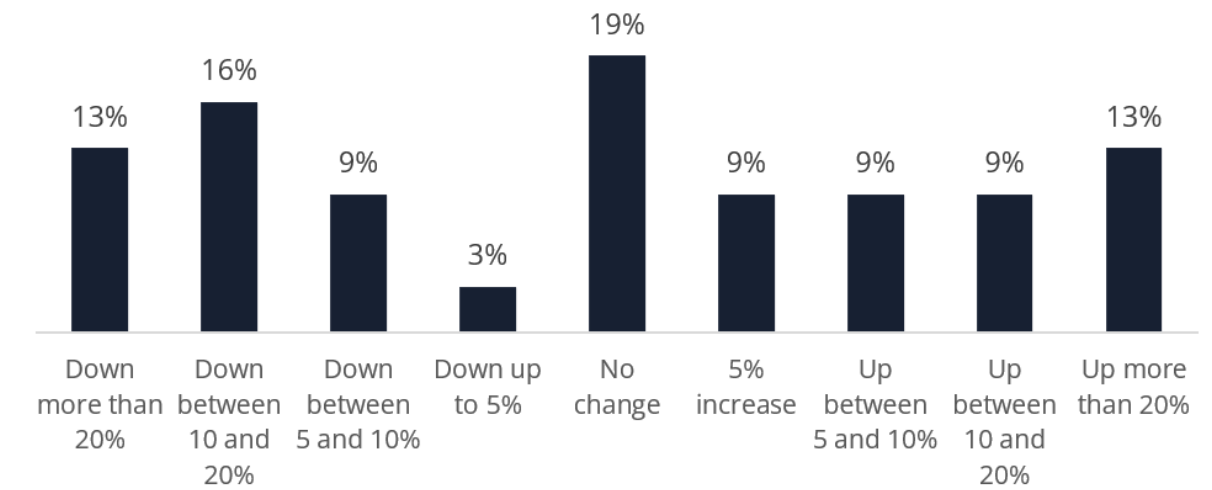


Source: Tourism Economics (2024)

How have nightlife establishment revenues changed in recent years?

Change in business revenues at nightlife establishments between 2021 and 2023: Survey respondents indicated how revenues at their nightlife establishment have changed in recent years. More than 19% of respondents indicated no change in revenues between 2021 and 2023. The remaining respondents were evenly split, with 41% of respondents indicating revenues had decreased between 2021 and 2023, and 41% indicating revenues had increased between 2021 and 2023.

Dallas Nightlife Business Owners, Operators, and Managers
(Change in revenue, 2021 to 2023)



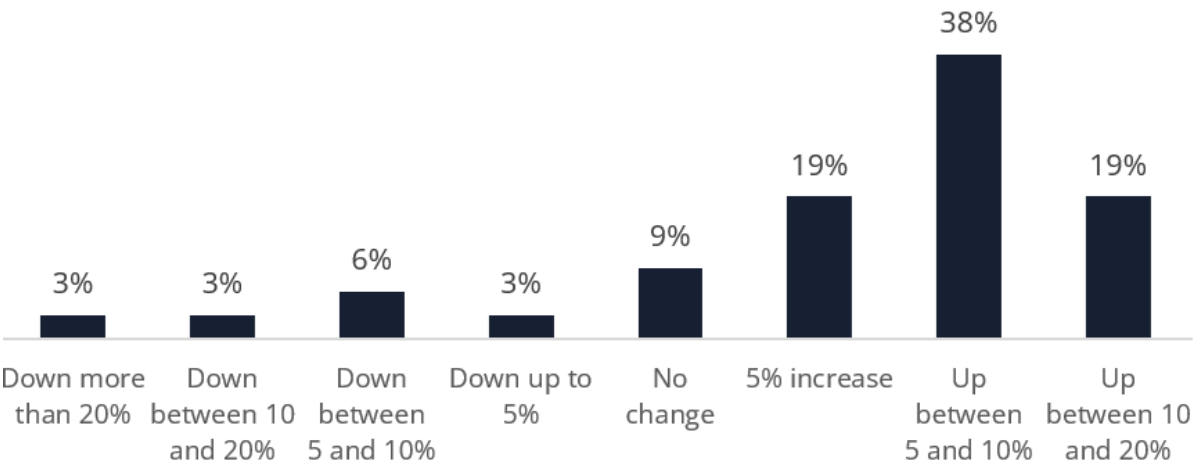
Source: Tourism Economics (2024)



How do nightlife business owners and operators think their businesses will perform in the next three years?

Expected change in business revenues at nightlife establishments over the next three years: Just 9% of respondents expected no change in revenues at their nightlife businesses over the next three years. A combined 16% of respondents expected a decrease in revenues over the next three years. As a sign of continued recovery and growth after the COVID-19 pandemic, a combined 75% of respondents expect revenues at their nightlife businesses to increase over the next three years, with 38% of respondents expecting an increase between 5% and 10%.

Figure: Dallas Nightlife Business Owners, Operators, and Managers
(Expected change in revenue, next three years)

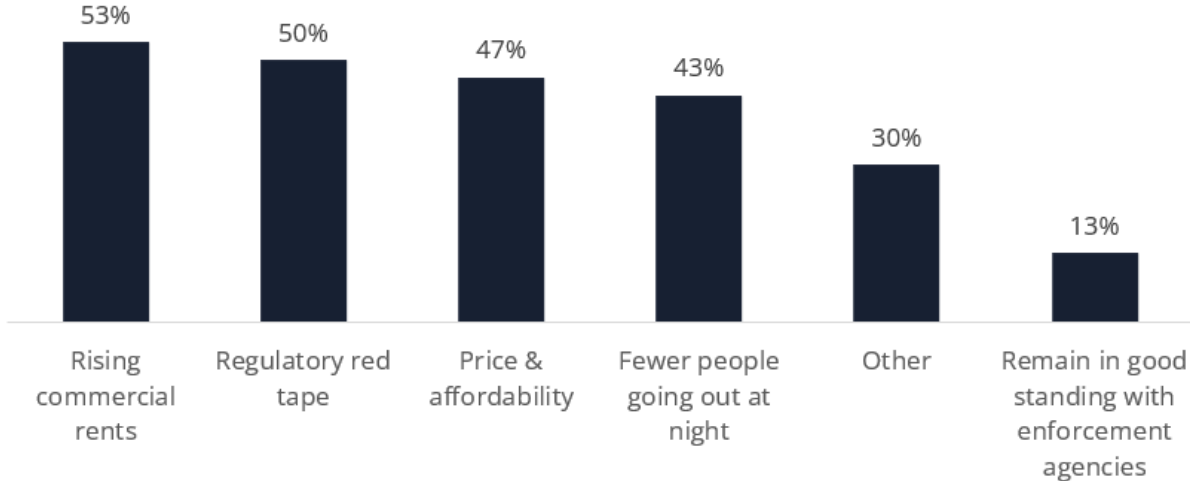


Source: Tourism Economics (2024)

What operating challenges do owners and operators of nightlife businesses face?

Main operating challenges facing nightlife business owners and operators: More than half of respondents (53%) indicated rising commercial rents will be main operating challenge. Nearly half of respondents (50%) identified regulatory red tape as an operating challenge, while slightly less than half of respondents (47%) selected price and affordability.

Figure: Dallas Nightlife Business Owners, Operators, and Managers
(Key operating challenges facing nightlife business owners and operators - multiple options permitted)



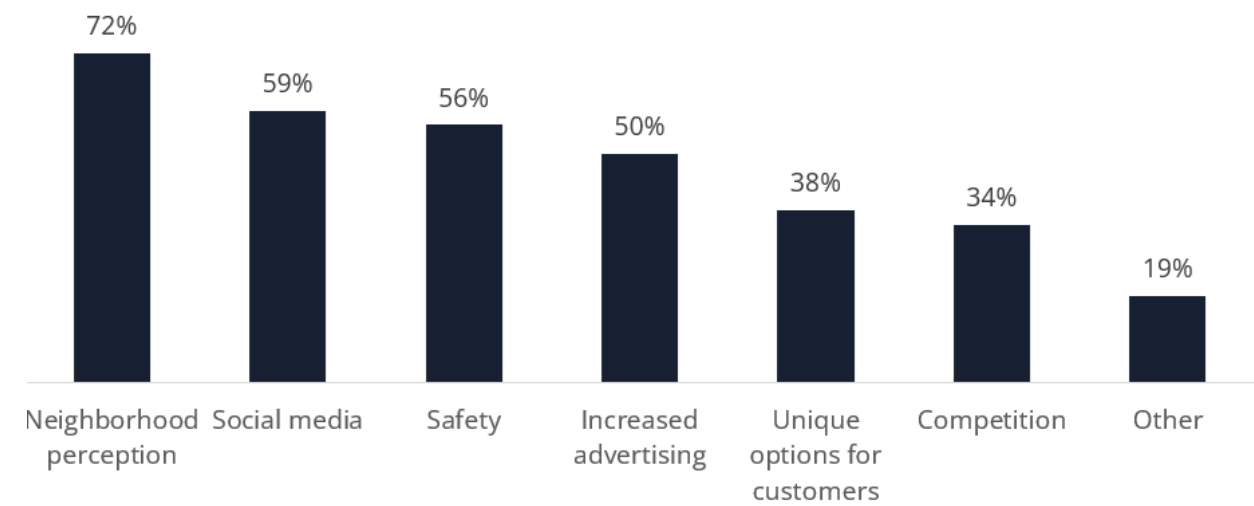
Source: Tourism Economics (2024)

Neighborhood perception ranked as the top factor influencing how businesses will attract customers over the next three years

What factors will most influence how nightlife businesses attract customers over the next three years?

Main factors influencing how nightlife businesses will attract customers: Neighborhood perception ranked as the top factor influencing how businesses will attract customers over the next three years, with nearly three-quarters (72%) of respondents selecting it as a factor. Safety also ranked highly, with 56% of respondents selecting it as a top factor.

Figure: Dallas Nightlife Business Owners, Operators, and Managers
(Factors influencing how nightlife businesses will attract customers - multiple options permitted)



Source: Tourism Economics (2024)

Dallas Nightlife Economy Opportunities for the Future


In addition to distributing surveys to nightlife customers and business owners, operators, managers, and employees, Tourism Economics also conducted interviews with key Dallas nightlife stakeholders and community members to gauge the current landscape of the nightlife economy and identify key challenges and opportunities facing the sector.

The Dallas Nightlife Economy Must Evolve

Nearly all interviewees acknowledged the need for the nightlife economy to evolve in order to meet consumer's changing preferences and tastes. While the nightlife sector has successfully rebounded since the COVID-19 pandemic, and consumers are once again going out and spending money, nightlife consumers are spending their money differently and are looking for a new, unique, diversified sets of experiences beyond just going to restaurants and bars to eat and drink.

While Dallas offers so many concepts and opportunities, a key challenge will be stimulating consumers by introducing them to new concepts. Results from the Dallas nightlife consumer survey indicate that "personal preferences and tastes" and "opportunity to attend a unique experience" scored the highest among factors influencing consumers' choice of nightlife activities. Nightlife businesses must be able to evolve to meet consumers' ever-changing preferences.

Several business owners who participated in interviews provided examples of integrating new music, live entertainment, and arts and cultural components to successfully attract new customers. With a growing population base in Dallas, as well as major, large-scale events like FIFA World Cup 2026 on the horizon, the Dallas nightlife economy is poised to evolve to continue its role as a key driver in the regional economy.



"The Dallas nightlife economy has to evolve to offer consumers more than just eating and drinking."



"People will leave their homes for unique talent that you need to experience in person. They want social experiences and human connections."

Key Issues & Challenges Facing the Dallas Nightlife Economy

As the nightlife economy continues to rebound, and in certain cases, surpass pre-pandemic levels of activity and sales, businesses face a new set of challenges and obstacles to succeed within the nightlife economy. Owners of nightlife businesses (including restaurants, bars, night clubs, comedy clubs, and recreational activity centers) indicated they had to change their business models and reinvent themselves when consumers returned to nightlife activities. Inflation on goods on services, as well as difficulties with the labor pool, are key operational issues affecting profitability for nightlife businesses.

Based on business owner/operator survey responses and interviews, safety ranks as the top factor affecting business performance. More than 72% of owners/operators selected neighborhood perception as a key factor in attracting customers over the next three years. In addition, nearly 60% of surveyed consumers indicated nighttime public safety was a key issue facing the nightlife economy. Most business owners who participated in interviews indicated they had implemented and paid for additional security and precautionary measures (on top of the police and safety measures from the City of Dallas) in order to address customer safety concerns and perception. Beyond concerns for customers' safety, owners/operators also cited employee safety as an important concern, as well as transportation accessibility.

The City's Role in the Continued Success of the Dallas Nightlife Economy

Given the newly created Nighttime Economy and Responsible Hospitality Division, the City's role in the continued success of the Dallas nightlife economy will be more important than ever. Interview participants were excited by the new focus and felt the Responsible Hospitality Division could potentially address issues facing the nighttime economy such as public patrols, safety stations, and "simple things like adding more trash cans" to mitigate littering issues.

In addition, interview participants felt the division could streamline processes to help businesses "navigate the red tape of City Hall regarding permits, licenses, and codes." Given the importance of safety concerns, the majority of interview participants felt one of the most important roles of the City from a policy standpoint would be to "stay ahead of safety issues and concerns."

While the Nighttime Economy and Responsible Hospitality Division was just recently created, business owners and nightlife community members are hopeful it will "elevate the voice of the nightlife community a little higher in the echelons of City Hall" and help shape the future of the Dallas nightlife economy by connecting, collaborating, and communicating with nightlife business owners, business districts, community members, and city departments.



Business owners and nightlife customers feel safety is the key issue facing the industry and are hopeful the newly created Nighttime Manager will help address continuing safety concerns

Appendix

Defining the nightlife economy

In order to capture the full breadth of the nightlife economy in Dallas, Tourism Economics considered the various social activities that typically occur between 6 a.m. and 6 p.m. The research team utilized the North American Industry Classification System (NAICS) to identify industries that contribute to the nightlife economy. These industries, or sectors, included: restaurants and food service, bars, arts and culture, venues, and sports and recreation.

While it is difficult to capture all of the economic activity attributable to the nightlife economy from a micro approach, using NAICS classifications provided a basis to capture a broad set of industries to which the research team could allocate proportionate shares (based on existing research) to isolate the activity within each industry that is attributable to nightlife activities. This methodology provides a conservative economic impact modeling approach since allocating all activity within the identified sectors to the nightlife economy would overestimate the sector's impacts. The sectors and corresponding NAICS codes underlying the impact analysis include:

- **Restaurants & food service:** includes full-service restaurants, limited/partial-service restaurants, food trucks, and cafes (NAICS codes 722310, 722320, 722330, 722511, 722513, 722514, 722515)
- **Bars:** includes drinking establishments and nightclubs (NAICS codes 721110, 722410)
- **Arts and Culture:** includes performing arts venues, movie theaters, galleries, and museums (NAICS codes 453920, 512131, 71110)
- **Venues:** includes concert and live entertainment venues, independent venues (not including performing arts venues included in the Arts and Culture sector), and informal performance spaces (NAICS codes 71130, 71150)
- **Sports and Recreation:** includes family-oriented recreation venues activities such as bowling alleys, arcades, family entertainment centers, amusement venues, and professional, spectator, and recreational participatory sports (NAICS codes 71310, 71320, 71395, 71120)

Tourism Economics compiled industry-level data from the Quarterly Census of Employment and Wages (QCEW) maintained by the Bureau of Labor Statistics, the Nonemployer Statistics (NES) database from the U.S. Census Bureau, data on jobs, economic output, and labor income from IMPLAN, and business-level data from DataAxle/ESRI.

Economic impact definitions

To determine total economic impacts attributable to the nightlife economy, Tourism Economics input direct spending of the nightlife economy into a model of the regional economy of Dallas, constructed using an IMPLAN input-output (I-O) model. IMPLAN remains a nationally recognized and widely used modeling tool and is the leading provider of economic impact data and analytics software. I-O models represent a profile of an economy by measuring the relationships among industries and consumers, quantifying three levels of impact: direct, indirect, and induced impacts. Key economic impact definitions include:

- **Direct impact:** Impacts (business sales, jobs, income, and taxes) created directly from spending by nightlife consumers within a discreet group of identified sectors (e.g. recreation, transportation, lodging).
- **Indirect Impact:** Impacts created from purchase of goods and services used as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected nightlife-related sectors (i.e. economic effects stemming from business-to-business purchases in the supply chain).
- **Induced impact:** Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by the nightlife economy.
- **Employment:** Jobs directly and indirectly supported by visitor activity (includes part-time and seasonal work). One job is defined as one person working at least one hour per week for fifty weeks during the calendar year.
- **Labor Income:** Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
- **State & local taxes:** State, City, and County taxes generated by the nightlife economy. This includes any local sales, income, bed, usage fees, licenses and other revenues streams of local governmental authorities – from transportation to sanitation to general government.

About the Research Team



Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modeling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics employs 400 full-time staff, including 250 professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.





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