

THINK NIGHT: LONDON'S NEIGHBOURHOODS FROM 6PM TO 6AM



LONDON NIGHT TIME COMMISSION

FOREWORD



London is a world-class city. As such, it merits world-leading thoughts on all aspects of city life at night.

We are interested in London's identity at night. When we talk about night we therefore consider it as broadly as we would the day. We have used a wide lens, looking at the wealth of activities that happen from 6pm to 6am.

Uniquely, London's Night Time Commission was established to build on London's strengths rather than to address a crisis. Our focus goes well beyond the scope of other similar bodies that centre only on the night time economy. The Commission set itself a broad, holistic framework: to develop and help realise an ambitious vision for the life of our city, and those who live in it, between 6pm and 6am.

This report paints a detailed portrait of London, bringing together our own research with the views of Londoners, the input of Commissioners and the knowledge

of expert witnesses. In another world-first, we commissioned new research to hear from Londoners themselves about how they use the city between 6pm and 6am: what they do, what activities they take part in and crucially what more needs to be done to allow them to live their lives more fully.

London is a dynamic and diverse ecosystem at night that goes far beyond commercial transactions. It incorporates the culture, character and atmosphere of our city. Londoners are more active between 6pm and 6am, and have later bedtimes and a better quality of sleep, than anyone else in the UK. Two-thirds of us regularly do everyday activities at night - errands, shopping, catching up with friends - and a staggering 1.6 million of us usually work at night.

Our city needs better planning to ensure life can thrive during these vital and vibrant hours. We need to tackle the very real challenges of cost and accessibility which hold many of us back from living life to the full at night.

Like the Mayor, we believe that London can provide so much more at night: more chances for night workers to shop, post a parcel or find a peaceful spot for a break; more chances for people to engage in local decision-making, helping shape and celebrate their neighbourhood's culture, heritage and character; more chances to find out what's on offer across all parts of the city; more chances for businesses to develop, innovate and grow, generating tax revenues, creating jobs and investing in their neighbourhoods.

We are excited by night time opportunities for the public sector. Every neighbourhood has its own character born of its people, history and culture. Parks, museums, libraries, town halls and other public buildings can be used differently at night to offer people a bigger range of things to do. The traditional night time economy can provide the buzz and launchpad for other cultural and community activities. Making 'daytime culture' available after 6pm will also broaden what it means to be in and around London's many and various neighbourhoods at night.

In addition to setting up new spaces, London can make better night time use of 'daytime' spaces like shops and public buildings. 'Nesting' a night offer within an underused space will help to tackle the decline of our high streets. Examples include reinventing a hotel lobby or retail unit at night to exhibit public art, host a pop-up market, or stage performances. If we don't innovate, we risk losing our place as one of the most vibrant and liveable cities in the world.

Our international research shows there has been a 'top-down' approach to managing cities at night. We do not believe this is right for London. This centralised approach is often used to control problem areas. It is not suitable for delivering diversity and helping neighbourhoods to flourish. As a city of villages and town centres, we feel that broad, holistic night time strategies should be set at borough level. This will ensure an approach that is tailored to the special character of each area.

That said, the Mayor and his team have a vital role to play in developing central resources that are available to boroughs and support effective and mindful decision making. In writing this report, we've drawn on a wealth of new and existing research. However, it has been hard to access clear and consistent data on which to base our findings. To address this will require data collection agencies, the GLA, government and the commercial sector to work together, addressing the gaps in our knowledge of London from 6pm to 6am. This data will be vital to inform borough policy-making.

Finally, we would like to thank our fellow Commissioners for their time, support and invaluable contributions throughout this process. We share a consensus about what the issues and priorities for London at night should be. Our recommendations reflect this. Thanks also to everyone who has helped us in our research. Let's put this plan into practice and help our great city to flourish at night.

Kate Nicholls and Rommel Moseley
*Chair and Vice Chair of the London
Night Time Commission*

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LONDON NIGHT TIME FACTS

TRAVEL



1/5

of all trips are for work. This is the same both day and night



2/3

of all trips at night are for leisure reasons



1/4

of trips on public transport happen at night



The biggest growth in public transport use is from

10pm to 7am



50%

of night bus journeys are for work



54%

usually go to bed after 11pm

CRIME



51%

drop in night time offences involving alcohol from 2010 to 2017



4.3%

of all crimes at night are alcohol-related offences



36%

of Londoners say it is too expensive to go out at night

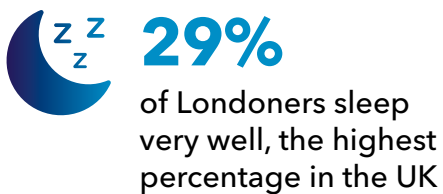
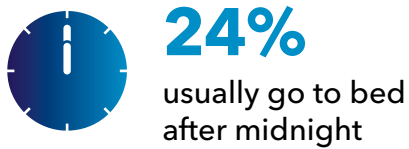
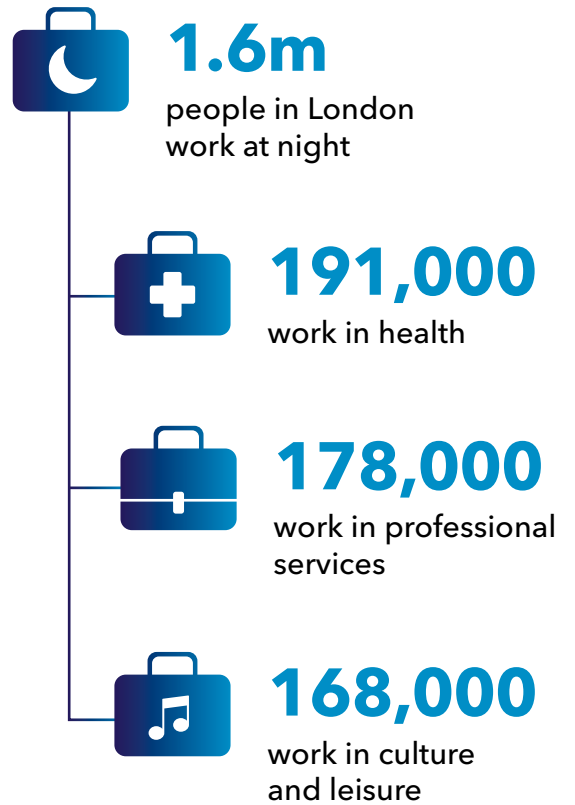
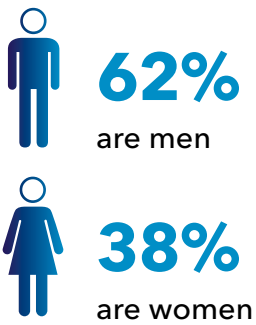


75%

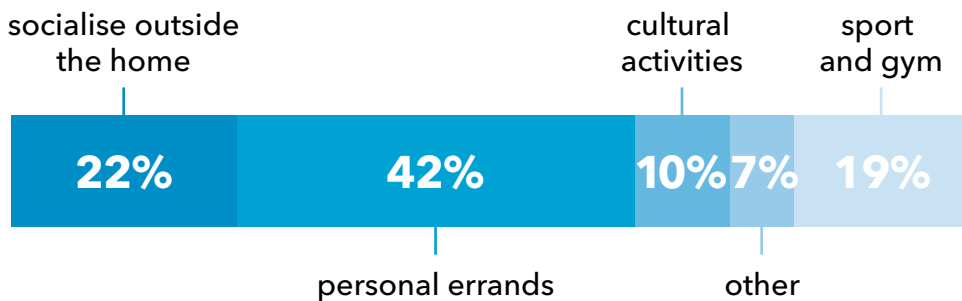
of Londoners and visitors feel safe walking alone at night

6pm

NIGHT TIME WORKERS



WHAT DO THEY DO?



6am



HOLLAND & BARRETT
Health foods & natural remedies

H
B

THE
VAPE
STORE

LOOK
LEFT
IF U NEED UR
MOBILE
FIXE

Gi...
RISTORANTE
ITALIANO

RECOMMENDATION SUMMARY



RECOMMENDATION 1: *The Mayor should put the night at the heart of London policy-making. He should introduce a Night Test for all new policies to rate their impact on London's culture, sociability, wellbeing and economy at night.*

Evidence and logic

Night, defined by the commission as 6pm to 6am is half of London's life. A quarter of all public transport trips are at night. A third of London's workers work at night. Two thirds of Londoners are active at night. Night issues cut across multiple departments and need to be central in policy-makers' thoughts.

Example of best practice

This will be a ground-breaking policy, marking out London as a world leader.

Key Performance Indicators

The Greater London Authority should introduce a Night Test for all new policies from mid-2019 and publish an annual audit to assess progress from 2020.

Local Authorities should adopt the Night Test and annual audit by 2021.



A strategic approach: supporting boroughs as they shape thriving public spaces, fuelling civic pride

RECOMMENDATION 2: The Mayor should produce Night Time Guidance for boroughs. This will help them develop holistic Night Time Strategies that go beyond the night time economy and cover all aspect of their town centres and other areas between 6pm and 6am.

Evidence and logic

The Mayor's new London Plan requires boroughs to produce visions for their night time economies. The Night Time Borough Champions Network has identified a need for support from the Mayor.

National research by the Portman Group and LGIU shows that 75% of councils would welcome more information and examples of best practice to help them develop their night time economies.

The guidance should recommend that councils include all departments in developing their Night Time Strategies. It should show how public spaces can be made more welcoming and inclusive at night.

Example of best practice

Only a handful of local authorities have night time strategies and most focus on small areas and are restricted to the traditional night time economy.

International examples include Melbourne's Night Time Economy Strategy, 2014-18.

The City of London have produced excellent strategies on night time waking routes, lighting and soundscaping.

Other interesting initiatives include the Paris Parks Summer Nights Programme and the Tokyo River Festival.

Key Performance Indicators

The Greater London Authority should produce Night Time Guidance by the end of 2019.

Local Authorities should have a Night Time Strategy in place by the end of 2020.

RECOMMENDATION 3: The Mayor should set up a London Night Time Data Observatory. This central hub of data on the economy, transport, licensing, infrastructure, safety and health would help boroughs create their Night Time Strategies and inform local decision making.

Evidence and logic

The Night Time Borough Champions Network has identified a need for consistent and relevant data about their boroughs at night. Boroughs require a replicable way to carry out cost-benefit analyses on their economies between 6pm and 6am. This will support better decision-making.

The Night Time Commission Research and Data Working Group identified that a more standardised format would allow easier and better comparisons across areas.

Example of best practice

This will be a ground-breaking policy, marking out London as a world leader. It will build on the Greater London Authority's London At Night report, published in November 2018, and the Mayor's Cultural Infrastructure Plan, which maps a wide range of night time cultural venues across the capital.

Key Performance Indicators

The Greater London Authority should establish the London Night Time Data Observatory by early 2020.

RECOMMENDATION 4: The Mayor should publish an annual report on London at Night. It should include a series of night time metrics that show his progress in implementing the Night Time Commission's recommendations and achieving the ambitions of his 24-Hour City Vision.

Evidence and logic

Measuring progress is an essential part of all successful strategies.

Example of best practice

It will build on the Greater London Authority's London At Night report, published in November 2018, and the Mayor's Cultural Infrastructure Plan, which maps a wide range of night time cultural venues across the capital.

Key Performance Indicators

The Greater London Authority should produce an initial report in 2019. It should include an audit of City Hall's and boroughs' progress in implementing the Night Time Commission's recommendations and achieving the ambitions of the Mayor's Vision for London as a 24-Hour City.

Vibrant, attractive and diverse centres at night

RECOMMENDATION 5: *The Mayor should establish a Night Time Enterprise Zone fund that boroughs can bid into, starting with a Pathfinder Zone in 2020.*

Evidence and logic

Londoners and boroughs recognise the contribution made by a well-managed 24-hour economy to jobs, investment, tax income and neighbourhood vibrancy.

92% of councils believe that the night time economy can help to save the high street from its current decline. Night Time Enterprise Zones will help boroughs achieve this in a controlled way.

Example of best practice

This will be a ground-breaking policy, marking out London as a world leader. The Mayor's Creative Enterprise Zones should serve as a model for how the fund is operated.

Key Performance Indicators

Establish a Pathfinder Zone in 2020 and launch a fund for all boroughs to bid into in 2021.



RECOMMENDATION 6: The Mayor should carry out research to establish the case for longer opening hours across London.

Evidence and logic

The range of activities open at night is limited, with many Londoners feeling there is nothing for them. By encouraging a wider range of people to be active, London will feel safer and more welcoming at night.

New late activity should be developed around the existing hospitality offer, starting with cultural organisations such as museums, galleries, theatres and music venues – some of which are experimenting successfully with later hours.

Example of best practice

The Catford Conversation in the borough of Lewisham includes opportunities for venues to trade until 6am with appropriate conditions.

The City of London's Culture Mile initiative is seeking to develop a diverse night time offer including culture, architecture, the public realm and events.

'A Culture of Lates' by Culture 24, with support from Arts Council England, shows the case for longer hours in museums and galleries. The findings are also applicable to other cultural spaces.

Sydney's City Council, which runs the central business district, is helping shops and other businesses to open later. They are promoting cultural use of under-used buildings, a fair approach to managing noise, marketing, grants and longer trading hours so operators can respond to changing retail opportunities, like local festivals and long summer evenings. This positive local action is as a first step to tackling the 'Lockout Laws', introduced by the State government, which have reduced opening hours and had a negative impact on Sydney's economy at night. This demonstrates the need for joined-up planning, with licensed and unlicensed businesses playing a part in a thriving evening, night time and late night offer.

Key Performance Indicators

The Greater London Authority should lead an initial study in 2019.

The London Night Time Data Observatory should be used to develop the evidence base and track progress from 2020.

Health, safety and wellbeing in a 24-hour city

RECOMMENDATION 7: *The Mayor, should help establish new partnerships across the capital to improve safety, reduce violence and make London welcoming for everyone at night.*

Evidence and logic

Safety considerations are a big reason why some Londoners chose not to be active at night, particularly women, older people and disabled people. Local partnerships are best placed to develop sustainable solutions. However, not all parts of London have successful partnerships in place to coordinate resources at night.

Example of best practice

The popularity of Business Improvement Districts (BIDs) could be built upon to support well-managed night time activity. The BID in Richmond funds 'greeters' to provide a friendly, visible and reassuring presence. The Safer Business Network, which operates several Business Crime Reduction Partnerships across London, could also be supported to roll out more schemes.

Key Performance Indicators

The Greater London Authority should map partnership schemes across London in 2019. This data should be included in the London Night Time Data Observatory. Boroughs and business should be encouraged to address gaps.



RECOMMENDATION 8: *The Mayor should develop guidance to help boroughs, landowners and developers create welcoming, safe and vibrant public spaces at night.*

Evidence and logic

Londoners and tourists enjoy walking and cycling around London at night. They particularly like the sense of festivity and celebration in busy areas. It is also a free way to enjoy the city. More can be done to make the public realm, in neighbourhoods across the capital, more welcoming, safe and sociable at night.

Example of best practice

The Illuminated River Project will bring new light installations to up to 15 Thames bridges starting with four City bridges in 2019.

Lumiere London, commissioned by the Mayor and supported by councils, businesses and Business Improvement Districts across the capital, attracted over 3 million visitors during the quiet January period.

The City of London's Lighting Strategy is a forward-thinking example of using well planned lighting to create welcoming, safe and easy to navigate streets and public spaces at night, year-round.

Key Performance Indicators

The Greater London Authority should host a seminar and develop guidance in 2019.



Ensuring London works for workers

RECOMMENDATION 9: *The Mayor should set up a Late Night Transport Working Group to ensure that workers, visitors and customers can get around London quickly and safely at night. The group should consider extending night services, introducing a 'Night Rider' fare that allows workers to move between bus, tube, train, DLR or tram in a single fare, and encourage more use of TfL's land and buildings at night.*

Evidence and logic

Transport planning currently focuses on customers using the night time economy. It should also take into account the needs of everyone who works at night. A quarter of public transport journeys take place at night. One third of Londoners work at night and demand for these services is increasing. Workers, visitors and residents all note the problem of cost and time it takes to travel at night.

Example of best practice

San Francisco Late Night Transportation Working Group.

Key Performance Indicators

Transport for London and the Greater London Authority should set up a Late Night Transport Working Group in the first half of 2019.

Promoting London in all its diversity to Londoners and visitors

RECOMMENDATION 10: *The Mayor should extend the remit of London & Partners so that they can promote London's night time offer to Londoners.*

Evidence and logic

Polling indicates that a significant number of Londoners feel that London at night is too expensive or not of interest to them. To address this, we need to raise awareness of the variety of free and affordable events that happen in neighbourhoods across the capital.

Example of best practice

Paris committed funds for a series of measures to boost nightlife tourism and Sydney are developing a night time marketing programme plus grants to encourage more events.

Key Performance Indicators

The Greater London Authority should agree to extend the remit of London & Partners and provide additional funding in mid-2019.

Our recommendations reflect the collective view of the London Night Time Commission though not necessarily the full views of each individual commissioner or the organisations they represent.



1

AN INTERNATIONAL PERSPECTIVE

A global view on urban night time policy and governance shows a variety of approaches across Europe, North and South America. Until recently, management of the city at night has been dominated by developing and growing night time economies around entertainment, leisure and consumption. This is focused on central business districts, historic areas linked to tourism, and new development zones planned and designed for night-specific uses. However, in recent years, discussions of the city at night have broadened to incorporate the needs of residents, workers and linked infrastructure.

Policies now focus on inclusivity, equity, increasing availability of amenities and managing key services, by encouraging a 24-hour approach to city governance. These fall under the following areas:

- Night time businesses
- Noise
- Safety and crime
- Transport and logistics

Interventions for night time businesses include creating resources to improve business compliance, security best-practices for nightlife venues, and the introduction of 24-hour licensing.

Measures to address noise and disturbance seek to mitigate the disruption to residents near to night time venues and businesses. This mainly places responsibility on venues to ensure that measures to mitigate noise are built into their design and services from an early stage. These are based on the Agent of Change principle. This principle also applies to developers of residential property when doing so alongside pre-existing night time venues.

IN RECENT YEARS, DISCUSSIONS OF THE CITY AT NIGHT HAVE BROADENED TO INCORPORATE THE NEEDS OF RESIDENTS, WORKERS AND LINKED INFRASTRUCTURE.

Safety and crime issues are often addressed with an explicit focus on gender. Cities have used volunteer groups in prominent public spaces to act as 'hosts' or 'ambassadors'. The aim is to encourage a friendly atmosphere, and partnerships with cultural bodies to host public events for a range of different groups.

Transport is a key part of night time policy: extending transit services into off-peak hours and sometimes to a 24-hour service. Policy measures also include consolidation of night time deliveries, dedicated zones for taxis, and improving transport options for night time workers.

Different approaches to governing the night time economy are applied in different cities. Though it should be recognised that, in the Commission's opinion, none of the approaches adopted previously has shared the extent of our ambition for what can be delivered from 6pm to 6am. A recent global survey of night time governance (Hawking-Sach & McArthur, forthcoming) identified three primary governance models:



- Dedicated night time councils, commissions or offices working alongside city-appointed night mayors or managers
- Individual night time managers working across existing departments of the city government
- Independent night time commissions, councils and offices

These approaches differ in their capacity to: coordinate across policy sectors; address cross-cutting issues; the allocation of financial and human resources; the representation of different interests; the level of transparency.

Dedicated offices and night mayors exist in Paris, San Francisco, Budapest, Vilnius and Nantes. A key role of these offices, established by the city government, is to engage with industry and the community.

In San Francisco, the establishment of an Entertainment Commission in 2003 initially focused on licensing for venues and bars. However, this remit has expanded to include late night transport focused on workers' needs. Paris' Night Life Council is led by the Deputy Mayor for Night Life and Cultural Economy. It comprises officials from the city and metropolitan governments, the police, the tourism office and a range of local organisations.

Aberdeen, Orlando, Pittsburgh and Cali (Colombia) have individual night time managers, working across existing departments. In Aberdeen, the Night Time Manager was appointed by the downtown Business Improvement District and work has focused on safety partnerships. Pittsburgh has a night time coordinator, focused on optimising the use of city resources for safety and monitoring the effectiveness of licensing policies.



Independent night time commissions or advisors exist in Berlin, Zurich, Amsterdam and Manchester. Amsterdam is seen as a key innovator in night time policy. Its Night Mayor Office was established as a non-profit organisation, independent from the City of Amsterdam. This office successfully lobbied for 24-hour licences across the city and introduced a pilot scheme for 'square hosts' to steward in public areas. In Berlin, the Club Commission represents nightclubs and their patrons. It has a range of working groups on culture, open air spaces, noise, politics and city development.

As with many urban issues, there is debate over the merit of top-down versus bottom-up governance approaches. The night time economy cuts across different functions of local government, including planning, licensing, urban design, safety and transport. As such, developing the night time policy agenda naturally requires a multi-stakeholder partnership and approach. In many cities, the night time policy agenda was shaped by the cultural and nightlife sector. There can be tensions between the interests of these sectors and the needs and preferences of the wider urban population at night.

DEVELOPING THE NIGHT TIME POLICY AGENDA NATURALLY REQUIRES A MULTI-STAKEHOLDER PARTNERSHIP AND APPROACH.

Across the world, top-down approaches to governance are the norm. This is because the economic motivation for boosting the night time economy encourages the establishment of appointed officials and commissions representing night time businesses. However, reflecting on how night time policy agendas and governance approaches evolve over time shows that public debates can lead to change. For example, wider interests such as gender, night time workers and safety, might follow after a relatively narrow focus on entertainment or economic interests.*

*Hawking-Sach, P. & McArthur, J. (forthcoming). Who governs the urban night? International review of night time governance, strategies and initiatives. UCL City Leadership Lab Report. University College London: London.

Smeds, E., McArthur, J., and Robin, E. (2017). Equitable transport provision for night time workers in London. UCL City Leadership Lab Report. University College London: London



2 STARTING FROM A POSITION OF STRENGTH



From the start, commissioners wanted to ensure our work would consider all aspects of London at night. Other cities have typically established working groups to address problems with their night time economy. That has never been our remit. Evidence shows we start from a position of strength. As such, we can be ambitious as to what London can achieve at night. We also look beyond the usual narrow focus on the night time economy to take in all aspects of the city. These include cultural, civic, environmental and heritage concerns, from 6pm to 6am - half of London's life.

We view the experience of London at night through a wide lens. In looking at all activity from 6pm to 6am we consider both the intangible and experiential aspects of London. We are concerned with London's night time identity. This identity is the sum of experiences and activities across the city. We want to capture and boost the civic pride drawn from the depth of character and range of identities across London's neighbourhoods.

In preparing this report, we have drawn on the following documents. "From Good Night to Great Night", the Mayor's vision for London as a 24-hour city and "Rewrite the night: the future of London's night time economy", a London Assembly Economy Committee report. Like these two reports, we are optimistic and ambitious for London's ability to flourish at night.

Commissioners, mainly through our Research and Data Working Group (RDWG), recognised the need for a strong evidence base to inform our work. Considering this, we commissioned the research in the GLA report, "London at Night - an evidence base for a 24-Hour City". We are grateful to the members of the RDWG who worked with the GLA to guide the research and establish this evidence base. It includes qualitative research that has helped us to understand the views of both Londoners and visitors to the capital. Quantitative research has also uncovered a wealth of data that reveals for the first time a portrait of London at night.

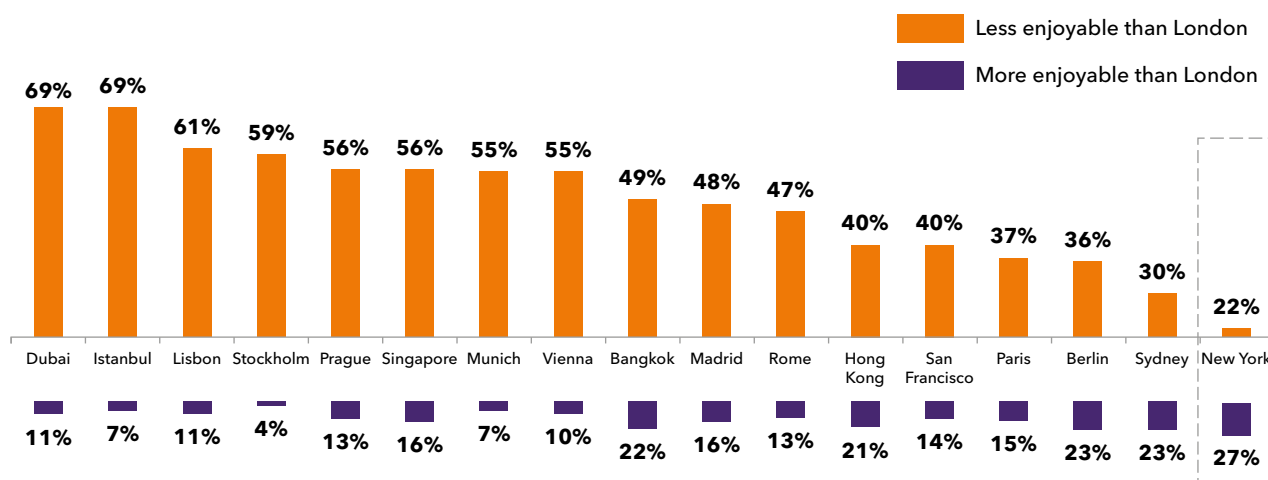
This range of insight and analysis has proved invaluable. It has guided our thinking on how the Mayor can support boroughs to create a London at night that works for all: residents, workers, and visitors. We hope it will be used by policymakers, academics and planners to support the sustainable development of London at night.

As a world-class city, London bears comparison with its peers across the globe:

- Number 1 overall in PwC Cities of Opportunity ranking 2016
 - 1st in both entertainment and attractions
 - 2nd for cities best suited for young people (aged between 15 and 29) to live and work
 - 1st in world university rankings
 - 2nd in libraries with public access
 - 3rd in Innovation Cities Index

A London & Partners survey, "Visitor voice London nightlife research" from 2017 found London's nightlife is second only to New York.

Figure 1. Percentage who agree/disagree the nightlife in London is more or less enjoyable than the following cities.



London & Partners, "Visitor voice London nightlife research", 2017

This London & Partners research also found that almost three quarters of visitors, 73%, were satisfied with London's nightlife. Furthermore, a high percentage of visitors thought London offers good transport and varied nightlife including a wide cultural offer. However, only around half felt that it provided value for money:

- 86% agreed that London's public transport system makes it easy to get around at night
- 81% agreed that London has a wide range of cultural experiences available in the evening
- 51% cent agreed that London's nightlife is good value for money
- 45% agreed that it is easy to find free evening events in London

In addition, most Londoners and visitors feel safe at night with 75% feeling able to walk alone in the dark.

Londoners themselves are very positive about what the city has to offer at night. Just 27% declare no interest in going out.

We've also been encouraged by the wealth of excellent practice across the boroughs identified through the Night Time Borough Champions Network. These include successful street markets in Newham, designing safer markets in the City, welcome ambassadors in Bromley and night walks for officials in Croydon.

75%
OF LONDONERS AND VISITORS FEEL ABLE TO WALK ALONE IN THE DARK.

VISITORS

In London in 2017 some 12.2m domestic visitors stayed 27.8m nights in the capital and spent £2.688bn. *The GB Tourist, 2017 Annual Report, Visit England.*

Yet London cannot afford to rest on its laurels. Our research has identified several areas where we should look to improve further:

- Perception of crime is consistently higher than the actual level
 - 19% of Londoners do not feel safe when out at night
- London at night is not for me
 - 14% of Londoners say too many places revolve around alcohol
 - 8% of Londoners say there are too few things I am interested in
- London's night time offer is all in the West End
 - 8% of Londoners say there are too few things in my local area to do at night
 - 14% of Londoners say travel takes too long at night
- London at night is too expensive
 - 36% say the total cost of a night out and 11% say the cost of travel is too high

We want these numbers to reduce over time, tracked by a new London Nightlife Observatory. Our aim is to achieve a London open to all, at all hours, across the city.

This report sets out practical ideas to help create model night policies in every borough. At the same time, we want to foster a spirit of experimentation and creativity to make the most of London's assets.

That does not mean imposing a 24-hour lifestyle upon Londoners. Instead, it means giving boroughs the information and guidance they need to take informed decisions. As they shape their areas at night boroughs will need support to develop local solutions that balance the needs of businesses, residents and visitors.

Boroughs are vital to achieving that ambition. London's town centres are shaped by local actions and local actors. This report seeks to support and guide them in their roles. Central figures and organisations like the Mayor, Night Czar and the Night Time Borough Champions Network also have key supporting roles to play. We believe the Mayor should review the Night Czar's remit and allocate more resources (including specialist licensing support) to reflect this increased workload.

By working together, informed by data and best practice, boroughs can respond to and anticipate the needs of residents, visitors and businesses. This will help them to create thriving night time spaces right across London.

For policymakers London at night cannot and should not be an afterthought. However, it often feels like that is the case. During our work, we were given examples of relevant policies like the 'Walking Action Plan' that contained little or no reference to the night.

There were also other proposals such as the consideration of a tourism levy that conflict with our ambitions for London at night.

London is a 24/7 city. A third of workers in London work at night. A quarter of trips on public transport happen at night. Two thirds of Londoners are active at night. When we define night as 6pm to 6am, we are talking about half of London's life. It's true to say our city never sleeps.

Night also cuts across practically every policy area, yet all too often it is the responsibility of a single department. We must not miss this chance to advance the positive impacts of a healthy life at night. That means seizing all opportunities to achieve our wider ambitions. For example,

using technical innovation like commissioning new smart lampposts to address safety, light pollution and mobile phone connectivity.

We believe the Mayor should introduce two new requirements at City Hall:

- Officials should have regard for the night when reviewing and creating policies. This is the case in other areas where, for example, regulators have a duty to consider the impact of policies on small businesses.
- A Night Time Impact Assessment should be part of the evidence base in all new policy.

We hope that borough leaders will also adopt this approach in their business planning process.

RECOMMENDATION 1: The Mayor should put the night at the heart of London policy-making. He should introduce a Night Test for all new policies to rate their impact on London's culture, sociability, wellbeing and economy at night.

Evidence and logic

Night, defined by the commission as 6pm to 6am is half of London's life. A quarter of all public transport trips are at night. A third of London's workers work at night. Two thirds of Londoners are active at night. Night issues cut across multiple departments and need to be central in policy-makers' thoughts.

Example of best practice

This will be a ground-breaking policy, marking out London as a world leader.

Key Performance Indicators

The Greater London Authority should introduce a Night Test for all new policies from mid-2019 and publish an annual audit to assess progress from 2020.

Local Authorities should adopt the Night Test and annual audit by 2021.



3

A STRATEGIC APPROACH: SUPPORTING BOROUGHES AS THEY SHAPE THRIVING PUBLIC SPACES, FUELLING CIVIC PRIDE



Like many major cities, London is a collection of neighbourhoods. As such, borough councils are the main agents in shaping the lives of Londoners across the city. Each borough has its own priorities based upon residents' needs, but they share several common goals. A central resource of information would help them make the best decisions and identify and develop good practice.

London at night is as much for somebody walking their dog, visiting friends or going to work, as it is for somebody eating out or going to a bar. In many ways, night is a broad term. It embraces entertainment and leisure, as implied by the term "nightlife", alongside other employment types that happen at night. However, too often the focus is only on the transactional. It would be a very partial picture if day-time London was described by its economic or transactional activities alone.

We believe boroughs need to develop a holistic strategy taking in the full spectrum of issues that shape our night time experience. This approach to shaping and managing our public spaces at night means accounting for multiple factors across myriad policy areas and agency responsibilities. For example, greater co-ordination of freight and logistics could improve London's sustainability.

The issues around how London operates at night are many, varied and often conflicting. Night offers a chance to ease pressure on daytime hours, for example by enabling deliveries or roadworks. Commissioners want greater coordination of freight and logistics to improve sustainability and ensure due consideration when shaping the experience of public space at night.

The new London Plan recognises this complexity. It proposes that "Boroughs should develop a vision for the night time economy, supporting its growth and diversification, in particular within strategic areas of night time activity, building on the Mayor's Vision for London as a 24-Hour City". We encourage boroughs to go a step further, beyond the night time economy, to create a broader strategy for their neighbourhoods at night. This would ensure that policy considers and plans for how residents, workers and visitors use neighbourhoods and public spaces from 6pm to 6am.

In discussing this proposal with the Night Time Borough Champions Network, it is clear boroughs see value in having a night strategy and would appreciate guidance on creating one. This is consistent with research by the Portman Group and Local Government Information Unit. It found that "councils are leading the way in developing night time economy strategies that recognise the immense opportunity for local people, businesses and council finances".

CASE STUDY: CITY OF LONDON

The City has an active and safe 24-hour economy with policies developed to consider late night needs in the round. A construction code supports 24-hour working. A board has been set up to implement the new lighting strategy, including the installation of a new lighting system, taking advantage of exciting new technology. The City's Culture Visitor Strategies have as a key action to 'Plan for a new leisure and evening economy and engage with residents and businesses on their views'. All supported by a night time economy study and mapping carried out by the Safe Sociable London Partnership. A rapid response noise team is in place to nip any negative noise issues in the bud. There is an annual Safety Thirst awards for licensed premises. This has run since 2006 in partnership with the police and fire brigade, recognising venues for their work to reduce alcohol related crime and disorder.

This same research found that three quarters of councils see developing their night time economy as a key priority. Yet, only one in five have a dedicated night time strategy. Echoing the sentiment of the Night Time Borough Champions Network, three quarters of councils say they would welcome national level policy to enable sharing of best practice and information.

Many, but not all, parts of London have a thriving and well-balanced night time offer. Our work with the Night Time Borough Champions Network shows that some outer London boroughs recognise they currently lack the buzz they would like to have. To address this, we need a strategic approach governing all policy areas. A focus on the economy alone will not work.

3/4
OF COUNCILS SEE
DEVELOPING THEIR
NIGHT TIME ECONOMY
AS A KEY PRIORITY.

Given the existence of the Night Czar and Night Time Borough Champions Network, we believe City Hall is well placed to produce this guidance. Boroughs should aim to put night time strategies in place for every town centre and the districts of the Central Activities Zone (CAZ).

CASE STUDY: CROYDON

Croydon is seeking to develop a night time strategy. They recognise that this is a complex piece of work with responsibility split across three Cabinet functions. They see the potential for a broad night time offer in areas across the borough. Their understanding is enriched by night time walks for councillors and officials.

Opportunities to pool resources with other areas, for example in running a Best Bar None scheme, would be appreciated.

Successful events at key times of the year such as Eid and Diwali help meet the Council's ambition for residents to feel their needs and interests can be met locally in Croydon.

City Hall guidance should incorporate many of the elements in this report and draw on the local and international best practice identified. Creating a vision for a town centre from 6pm to 6am should include:

- Polling and focus groups to understand residents' needs
- Engage local businesses, potentially via a Business Improvement District
- An audit of current assets and offer
- Use of data from the London Night Time Data Observatory
- Work to extend cultural offer beyond museums and galleries
- Identify public spaces that could be used for evening and night time events
- Promotion and marketing

A successful night time strategy should draw on existing policies - for example, cultural, environmental and transport strategies and the statement of licensing policy. It should be viewed as an opportunity for good growth. This is growth that benefits residents, while considering issues such as the environment, social inclusion, accessibility and diversity. Strategies, in adapting to fit local need, could cover a range of issues. These include evening cultural provision in libraries, paying the London Living Wage, addressing vulnerability and harassment or promoting public art after dark.

Strategies work best when developed with all relevant stakeholders. Named organisations can then be tasked with actions. This can offer potential for a mix of short, medium and long-term wins. We also need a way to measure progress. Managing our centres at night is complex. As such, there is a risk of contradictory approaches being adopted by agencies within the same area. Central coordination will be needed to ensure this does not happen.



LONDON NIGHT TIME DATA OBSERVATORY

The Research and Data Working Group's research and discussions with London's boroughs have identified a need for more accessible and comprehensive data. At present, it is hard to find good quality, robust data broken down by time, with the detail required for local level decision making. Often, the available London-wide data was not in a suitable format to allow meaningful interrogation. Addressing this need will provide the data necessary for informed, evidence-led responses to the Mayor's Vision for London as a 24-Hour City and preparation of a night time strategy. More use of evidence will allow boroughs to develop at night in a way that fosters diversity and accessibility. At the same time, this can be done without compromising on safety or causing problems for residents.

Strong partnerships are the key to creating successful cities at night. This is supported by decision making and policymaking based on real evidence. The Observatory has a vital role to play identifying, cleansing and collating data for the boroughs to use. It can also provide expert support and guidance on data use. For example, knowing which parts to exclude when reviewing crime statistics in relation to a bar or restaurant.

Boroughs are facing tight budgets. A centralised resource is therefore the best way to support their efforts to reinvent our town centres and high streets. City Hall is best placed to provide this help given its skills and resources. Its work for the commission shows this capability. The GLA has an edge in analysis and policymaking for this sector - crucially, now seen as vital to London's appeal and economic development.

We call it an ‘observatory’ because it would look to future potential, past track records and current performance. This pioneering facility would make London a world leader in creating evidence led strategies to shape our neighbourhoods at night.

The Observatory could include:

- **Crime and health.** A readily accessible and up-to-date library of data-sets covering current priorities within crime and health.
- **Economic development.** Economic data by borough on volume and value. A standardised cost-benefit analysis template could help boroughs promote and prepare economic policies for the night time sector.
- **Market trends and opportunity for growth.** A digest of consumer and business market trends and forecasts so that boroughs can get ahead and stay

ahead. For example, continuous tracking of the night time economy’s make-up both to help boroughs stay ahead of the curve and address misconceptions. As the chart below shows, London’s night time economy is now far less alcohol focused than a decade ago. The focus has shifted to food-led and entertainment-led offers.

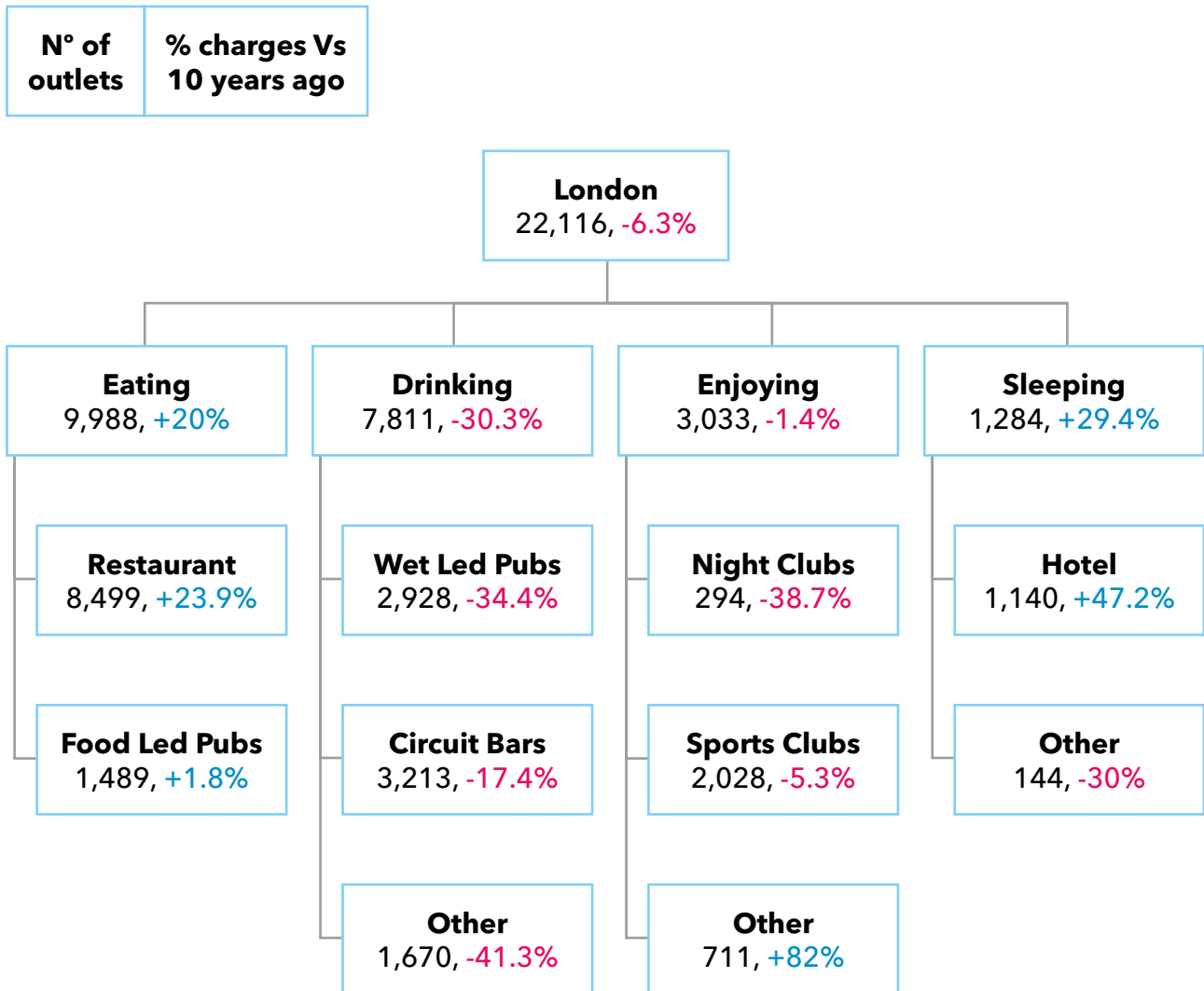
- **Mayor’s vision.** There are some key values in this that need to be tracked at borough and GLA levels. These include affordability and choice, availability and accessibility, inclusion and expression, diversity and self-regulation. The commission’s research is the baseline for this.
- **International comparison.** Build on work already done for the commission as set out in London at Night – an evidence base for a 24-hour city.

CASE STUDY: LEWISHAM

Team Catford’s ‘Catford Conversation’, is an excellent example of a community engagement, urban regeneration and place making programme. It has been designed to ensure that local people are given a voice as the council prepares a masterplan to regenerate the town centre. Central to this regeneration is the evolution of the late-night offer in Catford in a controlled manner, identifying underutilised spaces and opening them up for creative and cultural use, street markets, youth activity and theatre. New opportunities for late night industries have been developed with the ability to trade through to 6am tied to higher expectation in terms of operator standards.

There is a clear emphasis on civic pride as Catford is the heart of the borough and home to the main Council office and town hall. The council is drawing on its own assets, the Catford shopping centre and numerous high street units, to attract operators that add to the vibrancy and sustainability of the town centre. Catford Mews will incorporate a cinema, a live music venue and flexible work and community space.

Figure 2. The changing nature of London's hospitality offer.



Source: CGA Outlet Index November 2018 v 2008

CASE STUDY: NEWHAM

A leading thinker on combining commercial and residential needs into a cohesive placemaking strategy. Managing big projects such as Excel and the growth of City Airport alongside a regeneration strategy that looks to reinvigorate, invest and develop. A pragmatic licensing approach has been part of the broader strategy.



We envisage the GLA intelligence unit will work closely with the Night Czar and Night Time Borough Champions to develop technical guidance for boroughs on using this data locally. For example, it is always important to contextualise crime or health statistics with footfall figures. This is because the data sources used are usually designed for a different purpose. The opinion research in the London at night report provides the baseline for this.

As boroughs look to revive underused space, accessing accurate and timely data will help them to have informed discussions with potential investors. For example, contrasting data on the current night time offer with the needs and wants of residents will highlight gaps in the market.

CASE STUDY: EALING

Ealing is a great example of partnership, driven by the Business Improvement District, delivering a safer environment at night through consideration of lighting, organisation of the transport hub and strategic walking routes.

Figure 3. Comparing outlet and consumer information at borough level to identify where residents are under/over served by outlet type.

	<i>Rank of Consumers who are "Trending Tastemakers" by London Borough</i>	<i>% of Outlets which are Premium</i>
<i>City of Westminster</i>	1	63%
<i>Kensington and Chelsea</i>	2	71%
<i>Tower Hamlets</i>	3	47%
<i>Camden</i>	4	63%

Source: CGA Consumer Segmentation & CGA Outlet Index November 2018

The table above identifies an opportunity in Tower Hamlets for more premium outlets to meet currently untapped consumer demand. Such insight can be used to encourage venues to reshape their offer and invite new operators into an area.

COSTS & BENEFITS

All too often discussion around night time activities focuses on problems and costs. We need to instead focus on how they contribute to jobs, tax revenue and neighbourhood vitality. The night time segment of the economy is likely to make an ever more significant contribution. As such, we need a better way to do a cost-benefit analysis (CBA) of its development.

"London at Night - an evidence base for a 24-hour city" notes that several areas have prepared a CBA:

- 2012 GLA Economics report estimated that alcohol-consumption in London's night time economy alone generated between £1.6bn and £1.9bn in benefits a year. This compared to estimated costs of between £214m and £285m a year.
- 2013 report, Lambeth After Dark, by The Association of Town & City Management, TBR and MAKE Associates estimated the benefit cost ratio for Lambeth at 5.4:1.
- 2015 study for Westminster City Council, Westminster Evening & Night Time Economy, by TBR, estimated total costs at £187m in 2013 compared to total benefits equal to £3.2bn.
- 2017 report, Hackney's Evening and Night Time Economy - a Cost Benefit Analysis, by Ortus Economic Research estimated total costs of £23.5m with estimated benefits of £93.2m.

DISCUSSION AROUND NIGHT TIME ACTIVITIES FOCUSES ON PROBLEMS AND COSTS. WE NEED TO INSTEAD FOCUS ON HOW IT CONTRIBUTES TO JOBS, TAX REVENUE AND NEIGHBOURHOOD VITALITY.

It is clear there are usually far more benefits than costs. However, having a clear idea of costs will allow a borough to create a baseline and measure progress. It should be noted that some costs are good, for example marketing and promotion or the holding of events. In addition, costs are often borne locally, while linked revenues flow to the treasury leading to local level funding challenges. This could be addressed by reform to allow local retention of business rates at borough level.

City Hall can, through the London Observatory, help to both establish a model CBA template and simplify access to the data. This will make things much easier for boroughs. For example, while police data on crime is widely available, data by time of day currently requires a special request.

We would also like to see the GLA support boroughs in developing well balanced, self-regulating, hospitality-led areas of night time activity. Such an approach adds value and promotes diversity while reducing associated costs. It requires a holistic understanding of the opportunities open

to an area at night. This is one that goes far beyond a business-centred approach to incorporate employment, entertainment and cultural expression. City Hall should develop an evidence base and supporting protocols for boroughs' consideration.

NIGHT CZAR AND NIGHT TIME BOROUGH CHAMPIONS NETWORK

The commission has been impressed by both the Night Czar's work and the expertise and good practice of the Night Time Borough Champions Network. Building on work to date, we believe the Night Time Borough Champions Network should be relaunched and given greater visibility. There should be an annual conference where champions can discuss issues, identify good practice at night and hear from national and international experts.

More guidance should be given to boroughs on how they can incorporate a broader urban master plan into commercial developments. This would enable night and day time activities to be positioned in a mutually beneficial way.

The Night Czar could chair the conference and lead a team creating and curating a library of good practice guides for boroughs. The Night Time Borough Champions Network could develop priorities and a timetable. However, we expect guidance on creating a night time strategy to be an obvious starting point. As part of this, the Night Czar should work with MOPAC, police, operators and local government representatives to produce a guide on using data.



EVALUATING PROGRESS: FROM GREAT TO GREATER

There is vast potential to build on London's many assets. Thus we must track progress against our goals to make London at night clearly safer, more diverse, more affordable and more accessible. Metrics to measure progress will include outlet mix and spread across inner and outer London. Consumer opinion on quality, safety, affordability and diversity of offer, as well as progress on implementing the London Living Wage, should be tracked. There should be an annual evidence session at the GLA Economy Committee with the Night Czar to evaluate progress. This will include:

- **Diversification:** Tracking business data and broader activity at borough level to identify further diversification opportunities and preserve important segments such as LGBTQ+ and small music venues
- **Global Leader:** World Cities Culture Forum benchmarking
- **Barriers:** Track opinion research to identify progress against removal of barriers around perception of safety, affordability, accessibility and appeal

RECOMMENDATION 2: The Mayor should produce Night Time Guidance for boroughs. This will help them develop holistic Night Time Strategies that go beyond the night time economy and cover all aspect of their town centres and other areas between 6pm and 6am.

Evidence and logic

The Mayor's new London Plan requires boroughs to produce visions for their night time economies. The Night Time Borough Champions Network has identified a need for support from the Mayor.

National research by the Portman Group and LGIU shows that 75% of councils would welcome more information and examples of best practice to help them develop their night time economies.

The guidance should recommend that councils include all departments in developing their Night Time Strategies. It should show how public spaces can be made more welcoming and inclusive at night.

Example of best practice

Only a handful of local authorities have night time strategies and most focus on small areas and are restricted to the traditional night time economy.

International examples include Melbourne's Night Time Economy Strategy, 2014-18.

The City of London have produced excellent strategies on night time waking routes, lighting and soundscaping.

Other interesting initiatives include the Paris Parks Summer Nights Programme and the Tokyo River Festival.

Key Performance Indicators

The Greater London Authority should produce Night Time Guidance by the end of 2019.

Local Authorities should have a Night Time Strategy in place by the end of 2020.

RECOMMENDATION 3: The Mayor should set up a London Night Time Data Observatory. This central hub of data on the economy, transport, licensing, infrastructure, safety and health would help boroughs create their Night Time Strategies and inform local decision making.

Evidence and logic

The Night Time Borough Champions Network has identified a need for consistent and relevant data about their boroughs at night. Boroughs require a replicable way to carry out cost-benefit analyses on their economies between 6pm and 6am. This will support better decision-making.

The Night Time Commission Research and Data Working Group identified that a more standardised format would allow easier and better comparisons across areas.

Example of best practice

This will be a ground-breaking policy, marking out London as a world leader. It will build on the Greater London Authority's London At Night report, published in November 2018, and the Mayor's Cultural Infrastructure Plan, which maps a wide range of night time cultural venues across the capital.

Key Performance Indicators

The Greater London Authority should establish the London Night Time Data Observatory by early 2020.

RECOMMENDATION 4: The Mayor should publish an annual report on London at Night. It should include a series of night time metrics that show his progress in implementing the Night Time Commission's recommendations and achieving the ambitions of his 24-Hour City Vision.

Evidence and logic

Measuring progress is an essential part of all successful strategies.

Example of best practice

It will build on the Greater London Authority's London At Night report, published in November 2018, and the Mayor's Cultural Infrastructure Plan, which maps a wide range of night time cultural venues across the capital.

Key Performance Indicators

The Greater London Authority should produce an initial report in 2019. It should include an audit of City Hall's and boroughs' progress in implementing the Night Time Commission's recommendations and achieving the ambitions of the Mayor's Vision for London as a 24-Hour City.



4 VIBRANT, ATTRACTIVE & DIVERSE CENTRES AT NIGHT



London can be a city that works for all at night. As a 24/7 global capital, it creates opportunities for our world-class hospitality industry to trade 24 hours a day. That does not automatically mean more music and alcohol. Helping more businesses to trade throughout the night will give them a chance to experiment. This would help meet our ambition for a more diverse and inclusive night time environment. In looking to support this, boroughs can encourage longer hours for those operators seeking to innovate and bring something new to their neighbourhoods. For example, reinventing a hotel lobby space at night to house public art, performances or even a night market.

We recognise that longer hours carry a greater need for responsible operation. We are hugely encouraged by areas such as Catford that have shown how the two can be successfully linked. The presumption needs to be in favour of longer hours. Otherwise, London risks losing its place alongside the likes of New York, Berlin, Seoul and Amsterdam as a world-leading night city. That means boroughs supporting businesses and cultural institutions as they try and tap into the needs of their residents and visitors alike.

We would encourage the Mayor to meet with his counterpart in Manchester to review their approach to events and licensing. There is both brand value and revenue benefits of being a destination for music, culture and events.

Almost all councils believe that the night time economy will play an important role in preventing the decline of the high street. As such, we should open more opportunities for all businesses, particularly those within the night time industries, to deliver growth. This would generate tax revenue and create jobs while delighting consumers and nurturing the stars of tomorrow.

The benefits of a well-managed, diverse night time offer are desired across the capital. There is a perception that London's late-night offer is too often restricted to central areas, mainly the West End. However, boroughs have highlighted, through the Night Time Borough Champions Network, their own efforts to foster more developed late-night centres. The commission wants boroughs to develop a broader late-night offer in our town centres. This could be by granting longer hours to those operators intending to offer something new or appeal to different communities.

CASE STUDY: SOUTHWARK

Southwark has worked hard to broaden its night time offer through the use of: street food areas, building on the popularity of Borough Market and the mass appeal along Bankside and Embankment of a mix of cultural offerings (theatres, museums, galleries, street entertainments, food and music). This has been achieved through coalition building and despite the challenges of pressured police resources.



We are excited by the role that civic spaces can play in the night time. Parks, museums, libraries, town halls and other public buildings can be repurposed to offer people things to do in the evenings. These might be quieter and free - not led by profit but put on simply because it is good for the evening and night time of the city. Late opening for other cultural and social hubs like libraries, museums and galleries, should enable more localised types of evening and night time activity.

Commissioners are keen that when we refer to London at night, we think of it as broadly as we would during the daytime. More availability of cultural institutions across London, further into the night, will widen our understanding of what this means. It can also speak to that small minority of Londoners who currently feel that London at night is not for them.

London's cultural infrastructure encompasses a vast range of activities and venues which are of local, national and international importance. It is vital to tourism too, with four out of five visitors citing culture and heritage as the main reason for their trip. In recognition of this, we support initiatives to increase access to London's cultural institutions. At the same time, we also recognise that extending hours and increasing the number of free to attend events comes with a cost.

Institutions themselves are looking to diversify their appeal. For example, RA Lates where the Royal Academy is transformed for an ever-changing line-up of curated entertainment. There is also activity at both GLA and borough level - this includes London Borough of Culture and the Illuminated River.

CASE STUDY: LAMBETH

Lambeth has adopted a truly holistic approach to the night and early morning. From Brixton to Vauxhall there has been a concerted effort to maximise the benefits and mitigate the costs. Vauxhall particularly has a diverse offer with multiple 6am and 24-hour licences. Intelligent use of lighting and a positive and engaged operator attitude have been key to minimising the need for policing. While Vauxhall Pleasure Gardens are a great example of all purpose, broad appeal public space.

During an evidence session, we were excited to hear of the Museum of London's plans to extend opening hours. This recognises that the traditional timetable does not necessarily work for all visitors. A 'Lates' programme is an established model that brings thousands of people through the door.

Evidence from Culture 24's report, A Culture of Lates, shows that Lates thrive when they are part of a venue's core offer. In addition, Lates make an increasingly significant contribution to a diverse night time economy. They also help to generate income and attract new audiences. The next challenge is to normalise those longer hours. This could be cost neutral by shifting rather than extending hours or cross-subsidising extended hours with paid-for events like gigs in a gallery space.

There is an opportunity for the Mayor to collate and share best practice so that smaller organisations can learn from their larger counterparts. We believe there should be a future meeting of the Night Time Borough Champions Network dedicated to the role of culture at night.

Some commissioners have expressed a concern that, at present, there is a trend towards greater restrictions on late night hours, stifling investment and creativity despite there having been a 51% fall in night time alcohol-related offences in London since 2010/11.

While the overall number of licensed venues has increased, in the last decade, there have been reductions in operating hours and a raft of closures. This has led to a loss of 39% of clubs and 17% of bars in London. The resultant drops in investment and innovation have had a huge impact on night time opportunities. London needs to have an active 24-hour licensing regime if it is to truly operate at a global level as a city of the future. We should look to London's peers, such as Amsterdam and Berlin. There some premises like Berghain night club are given rolling 24-hour licences and are recognised as national cultural destinations for locals and tourists alike.



The Night Czar can play a vital part through the Night Time Borough Champions Network and as chair of the monthly licensing meeting between the GLA, Local Authorities, the Metropolitan Police and MOPAC. With these bodies, the Night Czar should develop guidance on the benefits of extending core licensing hours (to 6am and beyond). This should consider current trends in hours across the globe. It should encourage diverse developments that add value after 6pm. This guidance should give councillors and police officers confidence around the benefits of permitting responsible venue operators to trade under extended hours.

A more ambitious licensing approach requires better informed operators and regulators to ensure it is done properly. This could be achieved through a new London wide standard of excellence (paving the way for a national standard). The Night Czar should work with partners to develop training for Licensing Officers (police and council) and those councillors that sit on borough Licensing Committees. It would be sensible to tie this work to that of the Institute of Licensing. They have already started discussions with the Home Office and other stakeholders about developing training for councillors and police. This supports the government's response to the recent review of the Licensing Act 2003.

This training would deliver both technical insights and a broader backdrop to what licensed premises bring to the community. Requiring operators (through each venue's designated premises supervisor) to also take the training would establish a common understanding. This would be a further boost to partnership.

Training should be part the Night Czar's wider work in terms of how to best manage the city and individual venues at night. There are many existing schemes open to boroughs: from Purple Flag and Best Bar None to Business Crime Reduction Partnerships and Local Alcohol Partnerships. Through the Night Time Borough Champions Network, the Night Czar should develop guidance for boroughs on tailoring their efforts in this area to meet local need. The Night Czar should also identify opportunities for centralised support materials to reduce the burden on individual boroughs. For example, in terms of venue management, Best Bar None allows individual venues to apply for accreditation in the absence of a local scheme. This could be a route to higher standards for boroughs that do not feel, at present, a standalone scheme is merited. Best Bar None could form the basis of the 'gold standard' for venue management. This was recommended in "Rewrite the night: the future of London's night time economy", a London Assembly Economy Committee report.

Boroughs can encourage 'behaviour change' by adopting campaigns aimed to encourage people to be good town centre users at night. This should be coupled with the promotion of creative interventions in late night areas, such as signs prompting respectful behaviour at the end of the night. Alternatively, volunteers could hand out lollipops (as happens in a number of European cities) to reduce noise from people on their way home.

CASE STUDY: NOTTINGHAM

The Nottingham Partnership grew out of the first Local Alcohol Action Area (LAAA). In 2014 it led to the development of Drinkaware Crew (a scheme to address vulnerabilities of young adults) and the 'Wouldn't Shouldn't' campaign, which drives the message that being drunk is not an excuse for sexual harassment. Drinkaware further developed partnership activity in Nottingham by working with the Police and Crime Commissioner, the Police, the City Council, Nottingham BID and venues and operators such as DHP Family and Nottingham Trent Students Union. Working collaboratively with partners across the city has led to a holistic approach that results in a safer, more positive night time offer. The partnership has run city-wide awareness campaigns to help keep young people safe on Christmas nights outs, as well as delivering vulnerability training and support for venues, taxi marshals and fast food outlets.

NIGHT TIME ENTERPRISE ZONES

The Mayor should encourage more creative and widespread development of 24-hour activity by developing Night Time Enterprise Zones. Modelled on Creative Enterprise Zones, boroughs would be able to bid for funding to develop their night time plans. These will help boroughs foster a thriving and sustainable offer at night, rooted in the local area. This would attract entrepreneurs and, through making particular provision for younger start-ups, provide necessary space, employment and career opportunities for new talent. As with Creative Enterprise Zones, City Hall should first identify a borough willing to be a pilot.

Night Time Enterprise Zones could be a precursor to 24-hour destination hubs like those in Amsterdam. These zones tend to develop in more run down, post-industrial areas taking advantage of cheaper and more freely available space. In fact, boroughs should be encouraged to look at areas beyond the high street.

They should not be automatically viewed as solely for entertainment and hospitality. Boroughs will want to identify the right mix of hospitality, creative, cultural, retail and residential activity for their neighbourhood. Low cost units should be promoted so that operators can own premises and not be priced out by their own success. This would enable workers and residents who are happy to live amongst vibrant 24-hour activity to do so.

This model could prove most attractive to outer boroughs looking to vary their night time offer. Within these areas, boroughs could offer discounts on business rates to encourage later trading venues or businesses owned and operated by younger entrepreneurs. By recognising the positive intent behind Night Time Enterprise Zones, it should not be possible to introduce a Late Night Levy in any area covered by one.

RECOMMENDATION 5: The Mayor should establish a Night Time Enterprise Zone fund that boroughs can bid into, starting with a Pathfinder Zone in 2020.

Evidence and logic

Londoners and boroughs recognise the contribution made by a well-managed 24-hour economy to jobs, investment, tax income and neighbourhood vibrancy.

92% of councils believe that the night time economy can help to save the high street from its current decline. Night Time Enterprise Zones will help boroughs achieve this in a controlled way.

Example of best practice

This will be a ground-breaking policy, marking out London as a world leader. The Mayor’s Creative Enterprise Zones should serve as a model for how the fund is operated.

Key Performance Indicators

Establish a Pathfinder Zone in 2020 and launch a fund for all boroughs to bid into in 2021.



RECOMMENDATION 6: The Mayor should carry out research to establish the case for longer opening hours across London.

Evidence and logic

The range of activities open at night is limited, with many Londoners feeling there is nothing for them. By encouraging a wider range of people to be active, London will feel safer and more welcoming at night.

New late activity should be developed around the existing hospitality offer, starting with cultural organisations such as museums, galleries, theatres and music venues – some of which are experimenting successfully with later hours.

Example of best practice

The Catford Conversation in the borough of Lewisham includes opportunities for venues to trade until 6am with appropriate conditions.

The City of London's Culture Mile initiative is seeking to develop a diverse night time offer including culture, architecture, the public realm and events.

'A Culture of Lates' by Culture 24, with support from Arts Council England, shows the case for longer hours in museums and galleries. The findings are also applicable to other cultural spaces.

Sydney's City Council, which runs the central business district, is helping shops and other businesses to open later. They are promoting cultural use of under-used buildings, a fair approach to managing noise, marketing, grants and longer trading hours so operators can respond to changing retail opportunities, like local festivals and long summer evenings. This positive local action is as a first step to tackling the 'Lockout Laws', introduced by the State government, which have reduced opening hours and had a negative impact on Sydney's economy at night. This demonstrates the need for joined-up planning, with licensed and unlicensed businesses playing a part in a thriving evening, night time and late night offer.

Key Performance Indicators

The Greater London Authority should lead an initial study in 2019.

The London Night Time Data Observatory should be used to develop the evidence base and track progress from 2020.



UNDERGROUND



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5 HEALTH, SAFETY AND WELLBEING IN A 24-HOUR CITY



London is a safe city. In fact, it is one of the safest amongst its peer group of world-class cities. This sense of safety is borne out by our research. However, we recognise that certain groups feel less safe and that any increase in violent crime is a cause for concern.

Any consideration of health and wellbeing at night must look at the ways to make people feel safer. Most Londoners and visitors do feel safe at night (75% feel safe walking alone in the dark). However, a significant minority does not. Disabled people, those in low income households, and women do not feel as safe in London at night as other groups:

- 19% of Londoners do not feel safe
- 23% of women do not feel safe
- 23% of people in households on less than £20,000 a year do not feel safe
- 27% of disabled people do not feel safe

There is good work underway to help more vulnerable communities feel safer and more able to join in activities at night. However, more can be done.

A BALANCED NIGHT TIME OFFER CAN MAKE PEOPLE FEEL SAFER. A LIVELY AND ANIMATED PUBLIC SPACE FEELS MORE WELCOMING TO VULNERABLE GROUPS.

As part of their work developing a night time strategy, boroughs might want to reference the Mayor's Equality, Diversity and Inclusion Strategy and Policy SD6 on town centres in the new London Plan. In addition, the Night Czar could build on the work of the Women's Night Safety Charter to develop a programme focusing on helping vulnerable or excluded groups.

More activity at night does not automatically mean an increase in noise and light. A balanced night time offer can meet the demand for quiet spaces at night. It can also make people feel safer. A lively and animated public space feels more welcoming to vulnerable groups.

CASE STUDY: SUTTON

Sutton Street Pastors was set up in December 2005. Volunteers are out every Friday and Saturday night between 10pm and 3:30am. They were the 2018 Keeping Sutton Safe Award winners for their work in keeping people out of harm's way and ensuring they get home safely.

They can appreciate the security that comes from having people around providing 'eyes on the street'. This is something to which both urban design and land use policies can contribute.

Done well, we can organise the city to support our lifestyles and ease the stress of life in a dense urban environment. This might mean providing activities for specific age groups to combat social isolation and the potential for disorder. Taking an international example, Rio De Janeiro reopens public spaces at night as sports facilities for younger people. This provides a positive alternative for young people, reduces antisocial behaviour and offers the wellbeing gains associated with exercise. Encouraging public buildings to open longer or private sector investment in Night Time Enterprise Zones could help young people realise their creative and commercial potential. We encourage boroughs to apply for the Young Londoners Fund to support this, with round two of applications set to open this spring.

We must adopt a partnership approach to managing town centres at night with visible policing alongside other authority figures, like the Soho Angels project. As police budgets are challenged, many areas have found success by funding greeters and ambassadors through Business Improvement Districts. Such partnerships have been far better at bringing long-term benefits than imposing, for example, the Late Night Levy. We believe the levy should only ever be a last resort. Partnership should be the priority. If the Late Night Levy or similar tax is considered, funds raised should be used to promote and support affected centres at night.

Through the Night Time Borough Champions Network, boroughs have requested central guidance on setting up BIDs and using funding to create safer, more welcoming centres at night. To this end, the Night Czar should host a seminar on new Business Improvement Districts drawing on best practice from across the capital.

CASE STUDY: WESTMINSTER

Soho Angels and Night Hub run on Fridays and Saturdays from 10pm to 5am on Dean Street. They offer information, support and a safe space to those needing help at night.

The partnership was developed by Westminster City Council and the LGBT Foundation with support from Diageo. Whether they need water, support, or just a person to talk to, Angels help people to end the night right and get home safely. The Night Hub is a safe place to escape the bustle of Soho, sober up, get help, or simply charge your phone.



CASE STUDY: HAVERING

The Safe and Sound Partnership is a good example of partnership working, where the council, businesses, the police and voluntary groups are working together to make Romford safer at night. A borough wide Pubwatch provides information to the trade. Street pastors and the Deeper Lounge (a drop in, chill out area) provide support to the public and are staffed by volunteers from local churches. Police provide briefings to door staff at weekends so they are aware of any issues. TFL funded taxi marshals help get people home safely. A triage first aid provision provided by St John's ambulance volunteers takes place in a room provided by one of the clubs. The Council's licensing policy discourages vertical drinking establishments but encourages more restaurants in a bid to try and diversify the offer within the town centre. A new leisure centre in the town centre has an ice rink and holds disco skating evenings for younger residents which has led to a change in the town centre offer. The council's community safety team are running Best Bar None to celebrate good night time premises.

We agree with the Mayor's vision that central government funding is essential to keep London safe around the clock. As such, he should continue to lobby for the right resources to ensure that the Metropolitan Police can do its job.

London increasingly plays host to major domestic and international events from film festivals and sporting competitions to Pride and the New Year's Eve fireworks. Many of these events will spark satellite events across the boroughs. Each will require individual consideration of policing need. Appropriate security measures should be factored in and budgeted for from the earliest planning stage.

New technology can have a positive impact on health, wellbeing and safety. Our discussions with Theo Blackwell, Chief Digital Officer for London, focused on the opportunity for boroughs to reap these benefits. However, to do so, it is clear they need to act in a coordinated way to achieve vital economies of scale. We would therefore urge all boroughs to support the Smarter London Together Roadmap.

We are excited by the potential for smart street lighting to benefit Londoners and help London to:

- save money through upgrading to LED which delivers 50%+ energy savings and similar amounts on maintenance as the bulbs are more efficient and last longer

- reduce crime and make the city safer by managing lighting levels, adding and federating CCTV coverage, incorporating a speaker for public announcements, 'push-to-talk' to contact security or emergency services, electronic signage and footfall monitoring
- create a healthier environment - enabling electric vehicle charging to reduce fossil fuel use and adding sensors to monitor noise levels and air quality
- improve pan-city connectivity by building a dense array of lamppost into the overall 5G network. This will provide better public WiFi, integrating charging points to ensure Londoners benefit from fully charged and functioning phones

This should be done in a way that is sympathetic to London's historic street furniture and that does not compromise on light quality.

The Night Czar should chair a policy seminar and help develop guidance on designing public realm at night to be more inclusive and accessible. This should build on the good work of the 'Designing Out Crime' programme to consider venue mix, user type, capacity and infrastructure. It should also draw on international expertise like the Scottish Health model for designing healthy public spaces and the work of Projects for Public Spaces in the US.

POLICING

From a policing perspective, London is already a 24-hour city with shift patterns changing in recognition of a demand that now sees high call volumes through to 2am and then picking up again from 6am.

LIGHT AND WELLBEING

Artificial light has a vital role in the legibility, character and identity of the city at night. It also heavily influences perceptions of security and accessibility after dark, particularly for more vulnerable people. A 'well-lit' street or space does not necessarily mean 'more brightly lit', but well-designed and balanced. We therefore recommend that carefully planned and designed lighting should be a key part of boroughs' night time strategies. This should make streets and spaces feel welcoming, create vibrancy in key locations, protect the character of certain areas, support biodiversity and benefit residents' wellbeing.

We would encourage boroughs to commission lighting strategies akin to that developed by the City of London. This would include guidance on achieving best practice in area-wide legibility, orientation and wayfinding after dark.

The right lighting can enable and encourage exercise and play. Enhancing neighbourhood amenity and residents' wellbeing while avoiding light pollution and mitigating the impact on biodiversity. Boroughs may want to define areas where lower light levels and darkness should be protected or introduced to boost environmental sustainability and wellbeing.

Lighting can define and enhance areas - be that to celebrate heritage, reflect use or foster creative and cultural industries. Construction, retail and commercial lighting guidelines should promote sympathetic use of light and support the aims set out above.

GREEN AND BLUE THINKING

London's greenery, parks, rivers and waterways are central to its character during the day and should be so at night. London has a wealth of green spaces that are often underused at night, particularly during summer. Accessible green spaces in the evening and night time can boost the wellbeing of London and Londoners. In developing their night time strategies, boroughs could review the Mayor's Environment Strategy. They may also wish to consider the approach adopted by Paris and how it might apply to their area.

The Mayor should develop a night time strategy specific to the river that builds upon his Cultural Strategy. It should address lighting, walking routes, running and exercise routes, accessibility, land use, culture, events, freight, transportation, the natural landscape, biodiversity and ecology.

The Paris Parks Summer Nights Programme has been extended year on year to give more people an opportunity to enjoy the city's parks into the night. With appropriate security measures in place, the scheme has been a huge hit with Parisians. For the summer of 2018, over half of the city's green spaces were kept open 24/7.

CASE STUDY: RICHMOND

Following cuts to town centre policing, the local Business Improvement District, Be Richmond, established a Street Security Team which has become a familiar local sight. The team comprises two experienced operatives who patrol the area from 4pm until midnight on Thursdays, Fridays and Saturdays. The team's main role is to deter low-level crime and anti-social behaviour by providing a visible on-street presence. Team members are equipped with STRATA STREET DATA, an intelligent, dynamic, mobile app which records any crime and environmental issues and relays the information to appropriate organisations including the Metropolitan Police and Richmond Council. The team also has an ambassadorial role in the community, including helping tourists and assisting the public with wayfinding and Richmond-related advice.

We are excited by the potential of the Illuminated River project, a scheme to light 15 bridges along the Thames. Once complete it will be the longest public art commission in the world at 2.5 miles in length. It will make the river a bigger part of London's life at night, linking communities and celebrating architectural character and history while respecting the environment.

Beyond this project, publicly and privately-owned lighting along the river needs careful design and a wider coherent strategy and management plan. Public lighting of riverside routes and spaces should be sensitive to the river's character and ecology.

Walking routes are popular with Londoners. We would encourage boroughs to look at how they can connect their neighbourhoods through strategic walking routes as part of their active transport strategy. Walking and wheelchair accessible routes should be easy to navigate and attractive to use in the evening and night time. They should also strategically connect evening and night time transport modes, key public spaces, cultural venues, night time activity areas, libraries and town halls, spires and minarets.

In doing so, boroughs will reinforce local identity while opening the public realm to families and others who might currently be wary of venturing out at night.

Kennington Park

A great example of a public space invested in and creatively developed to meet the needs of residents. Not least the Midnight Path. This 24-hour strategic walkway was once under threat of closure and a hotspot for crime. It has now been improved thanks to funding from Transport for London.

Consideration of health and wellbeing should go beyond the individual to include our high streets and the natural environment of the city itself. Such a holistic approach is necessary to account for the many factors that impact London at night.

Ultimately, safety and the perception of safety is best addressed via the managed development of our town centres. This approach could see boroughs building on what is already working to enable affordable and sustainable growth. Such growth, underpinned by an increasing range of events and activities, will generate a stream of positive experiences and news stories. This will in turn encourage more

and more people to see what their area can offer them at night, shifting the narrative from concerns to celebration.

Sharing best practice, thoughts and ideas between boroughs will nudge people in the right direction without overbearing regulation or expensive policing. We need to prioritise self-regulation. This will encourage organisers to adopt a thoughtful and purposeful approach to achieving their goal.

CASE STUDY: TOKYO

The annual Sumida River Fireworks Festival dates from 1733 and has been held every year since 1978. Attracting close to a million people, it is one of the largest and most famous fireworks festivals of Tokyo. On top of fireworks displays, the festival follows the Japanese tradition of being a competition between rival pyrotechnic groups.

RECOMMENDATION 7: The Mayor, should help establish new partnerships across the capital to improve safety, reduce violence and make London welcoming for everyone at night.

Evidence and logic

Safety considerations are a big reason why some Londoners chose not to be active at night, particularly women, older people and disabled people. Local partnerships are best placed to develop sustainable solutions. However, not all parts of London have successful partnerships in place to coordinate resources at night.

Example of best practice

The popularity of Business Improvement Districts (BIDs) could be built upon to support well-managed night time activity. The BID in Richmond funds 'greeters' to provide a friendly, visible and reassuring presence. The Safer Business Network, which operates several Business Crime Reduction Partnerships across London, could also be supported to roll out more schemes.

Key Performance Indicators

The Greater London Authority should map partnership schemes across London in 2019. This data should be included in the London Night Time Data Observatory. Boroughs and business should be encouraged to address gaps.

RECOMMENDATION 8: The Mayor should develop guidance to help boroughs, landowners and developers create welcoming, safe and vibrant public spaces at night.

Evidence and logic

Londoners and tourists enjoy walking and cycling around London at night. They particularly like the sense of festivity and celebration in busy areas. It is also a free way to enjoy the city. More can be done to make the public realm, in neighbourhoods across the capital, more welcoming, safe and sociable at night.

Example of best practice

The Illuminated River Project will bring new light installations to up to 15 Thames bridges starting with four City bridges in 2019.

Lumiere London, commissioned by the Mayor and supported by councils, businesses and Business Improvement Districts across the capital, attracted over 3 million visitors during the quiet January period.

The City of London's Lighting Strategy is a forward-thinking example of using well planned lighting to create welcoming, safe and easy to navigate streets and public spaces at night, year-round.

Key Performance Indicators

The Greater London Authority should host a seminar and develop guidance in 2019.

CASE STUDY: LUMIERE LONDON

Lumiere London was a free outdoor light festival during the early evening enjoyed by over three million visitors and hosted across more than 20 landmark locations in central London, transforming the capital's iconic buildings and public spaces with 30 installations of ground-breaking artwork from world-class British and international artists.



6

ENSURING LONDON WORKS FOR WORKERS



Perception	Night is a fringe activity. People in London work during the day
Reality	One third of London's 5.3 million workers work between 6pm and 6am. That is 1.62 million workers across all sectors and occupations of the economy. This is slightly higher than for the UK at 29%. It is made up of a third of working residents of inner London, and 29% of working residents of outer London.
Perception	Night workers tend to be from a particular social class
Reality	Workers across all social classes are active at night. There is little variance in working patterns with 24% of ABC1s working at night and 22% of DEs working at night.
Perception	Night workers tend to have multiple jobs
Reality	Just 5% of night time workers in London have more than one job.

Our work has highlighted several misperceptions around night workers across London.

Research commissioned for this report found that while there are 1.62 million people who usually work between 6pm and 6am in London, only 1.41 million are Londoners. That means there are 289,000 workers who live outside London, and 79,000 Londoners who work outside London. Most people live and work in the same area. That is 31% both live and work in inner London, and 27% both live and work in outer London. Nevertheless, of the 1.01 million who work in inner London, 489,000 travel in from elsewhere. Further research is merited into the nature of the journeys undertaken by this latter group.

Evidence suggests that shift and night work can have a negative impact on wellbeing - in terms of both physical health and family and social life. That said, many people chose night work in order to spend more time with their family, for example taking their children to school. We need more progress to reduce cost and stress while improving quality of experience, access to training and support, availability of healthy food and wage rates. To this end, boroughs could look to adopt the approach of Lewisham where accredited London Living Wage employers qualify for a reduction in business rates worth up to £5,000.

Workers at night are often restricted in terms of where to go if they want to take their break away from the workplace.

Boroughs should think about designing quiet areas and relaxation spaces into the public realm as they are so important to general wellbeing. There is scope to create 'nap pods' (as in New York) to give workers a way of getting away from it all during their break.

There are several ways to open a wider range of facilities to workers at night. As well as encouraging later hours to access traditional retail, boroughs could look to employ unused spaces for pop up and late-night activity. This is a way of allowing existing uses to extend into the evening. Boroughs could consider relaxing their approach to planning and licensing to allow uses to 'nest' inside one another.

For example, there could be pop up bars and restaurants in cultural spaces or music performances in retail spaces. The Tate Modern and Science Museum, amongst others, have begun to open late on specific evenings. This includes nesting other uses within them, for example workshops, music performances and temporary bars. By providing a variety of additional activities, as well as access to the galleries, people of all ages and interests are catered to.

The Night Czar should invite retail and convenience sector representatives to a summit at City Hall to investigate the barriers and opportunities in opening longer to cater for the 24-hour workforce.



KEEPING LONDON MOVING

We are ambitious for the role that transport and Transport for London (TfL) can play in supporting the development of London at night. Paris, which benefits from central government support, is now consulting on making the city's transport entirely free, creating the world's largest free public transport zone. Similarly, the Mayor and TfL should be bold in expanding access to no- or low-cost transport at night. The benefits will be multiple: cleaner air, reduced healthcare costs and plummeting carbon emissions. This would make the city even more appealing to investors given the obvious increase in liveability.

City Hall should mirror the work in San Francisco to set up a Late Night Transportation Working Group. This group brings together local transportation providers, representatives from night time and early-morning businesses, nightlife advocates and other stakeholders interested in late night transport. It looks to:

- Consider expansion of all-night bus services
- Use challenge grants to make location-specific improvements
- Develop and launch a coordinated information campaign on existing services
- Monitor all-night transportation metrics in order to make additional data-driven recommendations

ARTIFICIAL LIGHT HEAVILY INFLUENCES PERCEPTIONS OF SECURITY AND ACCESSIBILITY AFTER DARK, PARTICULARLY FOR MORE VULNERABLE PEOPLE.

During our work, similar points have been raised around current and planned transport provision and the alignment of services with current and future need. Specifically, future night services need to be planned around where workers live and the nature of their commute. In addition, greater access to data is required to make informed decisions. We have a blind spot at present around night bus users in terms of both their journeys and activities.

A TfL led Late Night Transport Working Group could form proposals to significantly shift the level and nature of late-night services. We would like to see plans for an 'Opening up of the East' as a priority. This could support workers who would travel on the District Line or DLR if night services were running. This is vital as East London hosts almost half the Opportunity Areas identified for development in the Draft London Plan.



The group should be asked to produce a vision for public transport provision at night from 2025 onwards. It would take into account future developments in residential, commercial and leisure. This would ensure routes do not just cater for existing hubs but anticipate and meet new demand across the city.

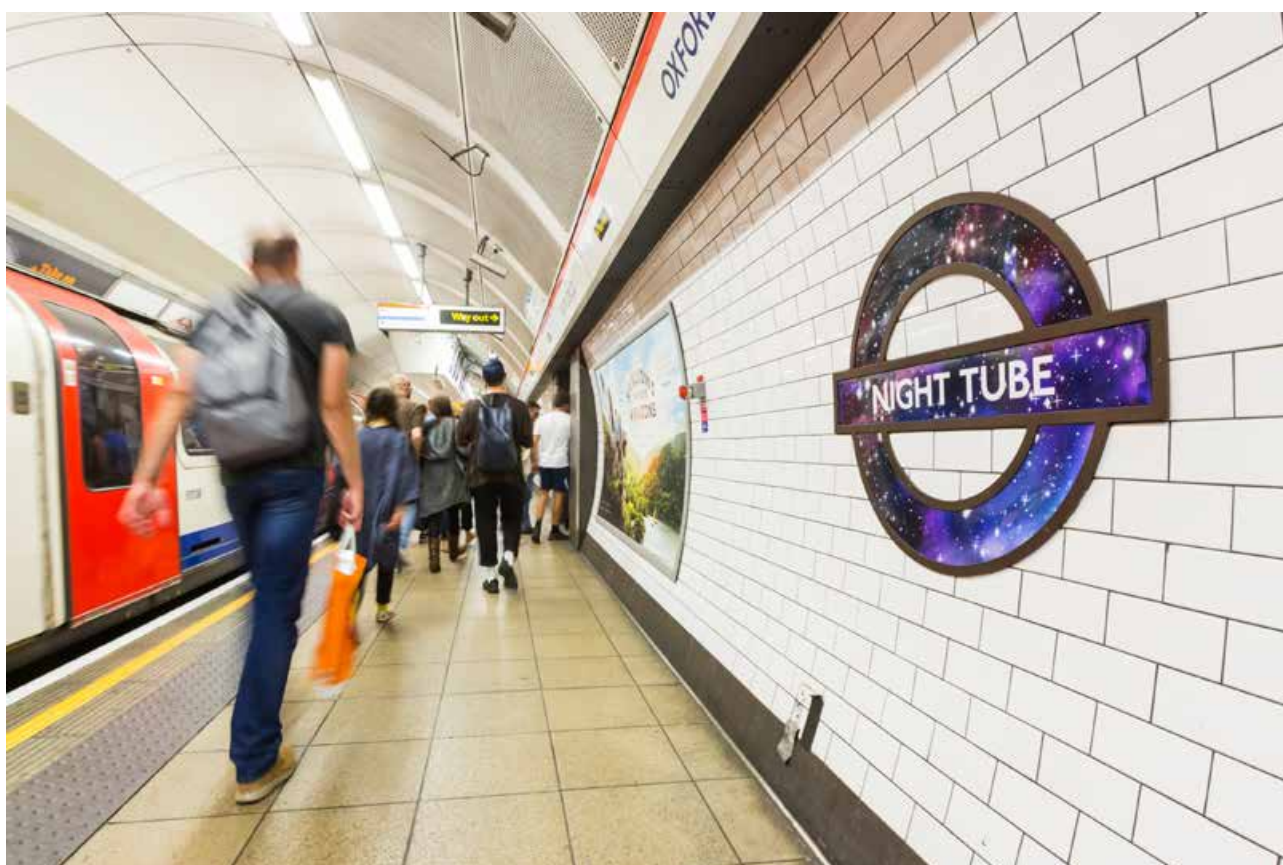
As more boroughs and town centres adopt night time strategies and Night Time Enterprise Zones come in to being, there will be a need to ensure transport provision keeps pace with such developments. TfL is committed to increasing bus use in outer London. We feel there is a clear role for bus services to anticipate and meet this demand.

This group would consider the potential of digital innovation and artificial intelligence to improve how people travel at night. Transport, as shown already by the activities of digital taxi firms, is likely to be one of the big areas of urban innovation. By looking ahead, the group can secure the benefits for those active at night.

Furthermore, it should look at how to best increase competition amongst cab and bus operators. This would be enabled by licensing more private providers. The aim is to continue to drive costs down for Londoners who travel at night whilst driving up standards. This group should include private sector operators offering non-public transport solutions at night to ensure it considers market-led solutions.

The group should look to increase availability of night time transport options while reducing cost through a new 'Night Rider' ticket. This should be multi-modal and could be enabled by a switch to the transport pricing model common in Germany. There commuters pay a fixed price for a journey regardless of the method of travel.

Another issue is those night workers whose travel straddles two 'days' as currently defined by TfL. With the new day starting at 4:30am, workers whose commute crosses that time may be penalised for two incomplete single journeys rather than their single trip. We feel there must be a technological solution to remove this penalty. For example, making tickets valid for 24 hours from the first journey. This would remove the cut-off point and tailor the need to the user.



More broadly, the group should develop guidance on traffic management and parking policies. We note that, particularly in outer London, businesses may be hampered in the evening and night time by daytime parking restrictions.

Beyond transport services, we also note that TfL real estate could be used more often to meet our objectives around safety and engagement. Providing safe spaces at Tube stations and mobile charging facilities will increase safety and the perception of safety. Offering reliable and easily accessible WiFi will also give people comfort (there is a clear link between having a charged and functioning phone and feeling safe).

Additionally, as in Japan, stations could host vending machines to extend access to basic provisions for late night and shift workers. While TfL stations and other spaces could be used to nest ancillary uses, whether social, cultural or commercial.

The group should also look at extending the branding and experience of night tubes and night buses beyond the graphic design of logos and maps. Lighting and audio in carriages and buses and in and around stations could be tailored to night time as well as reflecting the transition from weekday to weekend.

RECOMMENDATION 9: *The Mayor should set up a Late Night Transport Working Group to ensure that workers, visitors and customers can get around London quickly and safely at night. The group should consider extending night services, introducing a 'Night Rider' fare that allows workers to move between bus, tube, train, DLR or tram in a single fare, and encourage more use of TfL's land and buildings at night.*

Evidence and logic

Transport planning currently focuses on customers using the night time economy. It should also take into account the needs of everyone who works at night. A quarter of public transport journeys take place at night. One third of Londoners work at night and demand for these services is increasing. Workers, visitors and residents all note the problem of cost and time it takes to travel at night.

Example of best practice

San Francisco Late Night Transportation Working Group.

Key Performance Indicators

Transport for London and the Greater London Authority should set up a Late Night Transport Working Group in the first half of 2019.





7 PROMOTING LONDON IN ALL ITS DIVERSITY TO LONDONERS & VISITORS

Londoners are proud that different areas of London have their own unique cultural offering. However, more could be done to promote the richness of the night time offer across the capital. Chicago promotes itself as a 'City of Neighbourhoods' while Paris funded a programme to boost tourism at night.

We need to improve the promotion of London at night to domestic audiences (Londoners and visitors alike). Currently, several organisations do some form of promotional activity. This covers time-limited campaigns, ad hoc work and promotion to wider audiences which reaches domestic consumers as a side effect. However, no single agency or body has a formal mandate and this results in a lack of focus.

MORE COULD BE DONE TO PROMOTE THE RICHNESS OF THE NIGHT TIME OFFER ACROSS LONDON, ESPECIALLY LOW AND NO COST ACTIVITIES.

We have been clear that promotional activities need to capture the range of events held across all of London. This would reinforce the existing strengths and specialisms that shape the characters of individual boroughs. Showcasing grassroots events across the arts, entertainment, culture and education will attract a wider range of users and enrich our city at night.

A clearer remit to promote London's tourism opportunities at night should enable increases in visitors from key demographic groups. During 2017, day visit numbers to London from the rest of England fell 3.8%. Visits from families and schools also dropped according to industry stakeholders, due to financial pressures, attraction ticket prices and security threats.

Increasing awareness of no- and low-cost activities and events held across London every night of the year would meet several of our ambitions. Our research including polling Londoners about their experience of the city at night. It highlighted the following:

- Diversity: we can encourage more people out at night by addressing their concern that the current offer is just not for them
 - 14% say too many places revolve around alcohol
 - 8% say there are too few things that interest them

- Accessibility: encouraging Londoners to explore the capital's wealth of neighbourhoods by countering the perception that nightlife is all about the West End
 - 8% say there are too few things in their local area
 - 14% say travel to areas of night time activity takes too long
- Affordability: opening the night time economy to a broader range of people by addressing the perception that a night out is expensive
 - 36% say the cost of a night out is too expensive. Amongst 18-24 year-olds, this figure rises to 50%
 - 11% say travel as part of a night out is too expensive

This has been echoed by the Night Time Borough Champions Network who would welcome ways to promote their local offer to both their own residents and Londoners across the city.

It is our view therefore that a programme to promote London at night should aim to:

- Increase visits to attractions in zones 2 – 6 to spread the benefits of tourism and celebrate the individual character and nature of London's town centres

SHOWCASING GRASSROOTS EVENTS ACROSS ARTS, ENTERTAINMENT, CULTURE AND EDUCATION WILL ATTRACT A WIDER RANGE OF USERS AND ENRICH OUR CITY AT NIGHT.

- Increase participation in a wider range of cultural activities beyond museums and galleries
- Increase visits during quieter, shoulder periods
- Increase off-peak use of public transport
- Increase the number of visits from Londoners, day trippers and overnight visitors



In this context, London's domestic marketing requirements would include the following:

- An insights function that combines ONS data and data from industry partners to provide a clear, timely and shared understanding of London's domestic visitor landscape
- A strategy function that can use the evidence base and work with partners to agree priorities and objectives and evaluate activity
- Marketing campaigns that inspire domestic visitors to visit London. These could be in a range of channels and take a range of forms, depending on the specific objectives

- Always-on channels to inspire visits and guide visitors towards specific activities, offers, attractions and areas
- A transactional site or app where partners can place products and offers, and where products and offers can be bundled together to create attractive themed propositions (for example transport and attraction; attraction and meal)
- Maximising cross-marketing between sectors to ensure that (for instance) business tourists visiting London for conferences are encouraged to take advantage of London's leisure and night life opportunities when they visit. Equally, London's night life offering is a major differentiator against rival cities. As such,

it should be a major part of London's pitch to prospective conference clients

Having identified a clear need, we feel there is an opportunity to meet it through an extension of the work of London & Partners. Particularly, their Visit London work and the London Areas campaign. While London & Partners do not have a formal mandate to promote domestically, their digital channels are used by a large domestic audience. London & Partners is best placed to maximise the benefits of cross-marketing between business and leisure audiences, and to efficiently redeploy internationally targeted messaging. However, to do so would require increased funding and accompanying governance structures.

RECOMMENDATION 10: The Mayor should extend the remit of London & Partners so that they can promote London's night time offer to Londoners.

Evidence and logic

Polling indicates that a significant number of Londoners feel that London at night is too expensive or not of interest to them. To address this, we need to raise awareness of the variety of free and affordable events that happen in neighbourhoods across the capital.

Example of best practice

Paris committed funds for a series of measures to boost nightlife tourism and Sydney are developing a night time marketing programme plus grants to encourage more events.

Key Performance Indicators

The Greater London Authority should agree to extend the remit of London & Partners and provide additional funding in mid-2019.

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