

London at night:
An evidence base for a 24-hour city

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For more information about this publication, please contact:

GLA Economics

Tel 020 7983 4922

Email glaeconomics@london.gov.uk

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Contents

Foreword from the Mayor of London	2
Foreword from the London Night Time Commission	3
Foreword from the Night Czar	4
1 Executive summary	5
2 Introduction	10
3 London’s night time workers	12
4 London’s residents and visitors.....	47
5 London’s night time industries	90
6 London’s night time cultural venues.....	104
7 London’s night time travel.....	119
8 Safety in London at night.....	135
Annex A: Methodology to define a night time category of industries and occupations.....	164
Annex B: Opportunities for new urban data to give a more complete picture of London’s night time offer	169
Annex C: International evidence on the night time offer	172
Annex D: Public transport journeys within London.....	189
Annex E: Estimating the costs and benefits of night time activities.....	208
Annex F: Limitations of police crime and ambulance service attendance data.....	215

Foreword from the Mayor of London

This report marks a step change in our understanding of London at night. It is the most comprehensive research of its kind and reveals that between 6pm and 6am, London buzzes with social, cultural and economic activity. The evidence outlined in this report not only challenges some of the myths and perceptions around our city at night, but also shows the huge opportunity we have to make London work better for Londoners around the clock.

A third of London's workers usually work evenings and nights – that is 1.6 million people, from nurses and office workers to technicians, drivers and hospitality staff. Within the culture and hospitality sectors, night time workers represent more than half of the workforce, but far too many are being paid below the London Living Wage. The London Night Tube, Overground and Night Buses are helping night time workers get to and from work safely and quickly, but there's still much more that can be done to ensure their welfare. That's why I'm calling on London's night time employers to join my Good Work Standard, which promotes fair pay and the London Living Wage as well as excellent working conditions.

London is a city of night owls, with a quarter of Londoners regularly going to bed after midnight. They are using their time to run personal errands, shop, socialise, take part in a cultural activity, play sport or go to a community group. London's culture and nightlife is also attracting record numbers of tourists from around the world who love the diversity and vibrancy of our city.

This report highlights that you are actually no more likely to be a victim of crime at night than during the day. Nevertheless, some groups, particularly women, still have a greater fear of crime at night, which is concerning. That's why my Deputy Mayor for Policing and Crime and my Night Czar have launched the first Women's Night Safety Charter, which is supported by night time venues, boroughs, transport providers and employers across the capital.

I want all Londoners to reap the benefits of living in a 24-hour city. That's why I set up an independent Night Time Commission that is looking at how London can develop as a 24-hour city for all. I'm grateful to the Chair, Kate Nicholls, the Vice Chair, Rommel Moseley, and the members of the Night Time Commission for their expert input into this landmark research.

This report and new evidence will be invaluable to the Night Time Commission. It will support my Night Czar and the Night Time Borough Champions Network that she leads. Partnership with London's local authorities, businesses, residents and public authorities is at the heart of creating a vibrant night time culture. Together, our aim is to make London a city that responds to the needs and interests of all residents, businesses and visitors at night.

Sadiq Khan
Mayor of London



Foreword from the London Night Time Commission



The London Night Time Commission was set up to provide independent advice to the Mayor. Our role is to recommend how London can become one of the most progressive cities in the way it plans for the night. To do this we needed a strong evidence base to inform our work.

The Night Time Commission was instrumental in commissioning this research. We are grateful to the members of our Research and Data Working Group who have worked

with the Greater London Authority (GLA) to guide the research and establish this evidence base over the last year. It includes qualitative research that has helped us to understand the views of Londoners and visitors to the capital. Quantitative research has also uncovered a wealth of data that reveals a new picture of London at night.

We have defined ‘night’ as everything that happens in the city between 6pm and 6am. This is the first time a city has adopted such a broad and ambitious definition. It will allow us, in making our recommendations, to consider not just the traditional night time industries such as culture, leisure and hospitality, but to look at the many interweaving aspects of life in London at night.

The report provides a portrait of London at night; a first for any global city. It presents a fascinating insight into what Londoners do at night. That includes the substantial number of people who work at night across all industries. The report looks at how visitors perceive our city and analyses trends in London’s growing economy at night. It sets out the challenges that people face such as the cost of going out. What is also clear from all the data collected is that London starts from a position of strength.

As with any new research we have discovered gaps in the data. There are areas where future research and data-sharing partnerships can deepen our understanding. However, this compendium of insight and analysis is a major achievement and a big step towards London seizing the opportunities of being a 24-hour city. We hope that this will be used by policy makers, academics and planners to support the sustainable development of London at night.

Kate Nicholls
Chair of the London Night Time Commission

Rommel Moseley
Chair of the London Night Time Commission Research and Data Group

Foreword from the Night Czar

London's night time culture has always been full of opportunity; it is what attracted me to move here over 25 years ago. From world class music venues like the Roundhouse and 100 Club, to the pop-up rooftop cinema Roof East in Stratford; from South London's Battersea Arts Centre to Diwali, St Patrick's Day and Pride in Trafalgar Square, London buzzes with culture and variety after dark.

Our city is dynamic and changing for the better. The Night Tube and Night Overground have been warmly welcomed by those who work or go out at night. Night Buses are also as popular as ever. But there are still many challenges.

Until now, there has been little research into what Londoners and visitors do at night and what Londoners think about the capital's life at night. The creation of this evidence base was initiated in partnership with the Night Time Commission. It gives us, for the first time ever, the data and analysis that will help us realise the Mayor's Vision for London as a 24-Hour City.

This report shows that Londoners care about diversity and opportunities to meet different people. We want to ensure that London celebrates diversity, strives for equality and is known as a friendly and welcoming city at night. The welfare of night time workers, the safety of women at night and reports of racial discrimination by some London venues remain serious concerns.

That's why this research is welcome and why we will continue to protect and promote a wide variety of things to do at night. We have already helped over 300 diverse culture and community spaces to survive and thrive.

Making London better at night relies on everyone playing their part. We want to ensure that London is fit for the future as a 24-hour city. The Night Time Commission has made a valuable contribution to advancing this ambition and I look forward to their recommendations later this year.

This ground-breaking report will underpin and inform my role as Night Czar to ensure London is a safe, welcoming and vibrant city at night for all Londoners.

Amy Lamé
Night Czar



1 Executive summary

This report brings together a range of research and data on London at night. It reveals that, between 6pm and 6am, the city is buzzing with social, cultural and economic activity. London is a leading global city. Visitors come from around the world to experience the culture on offer in London. Yet we can still do more to make London at night an even better place for people to work, rest or play.

1.1 Highlights

1. A third of everyone working in London works at night – that is 1.6 million people.
2. Of this group, 191,000 work in Health and 178,000 in Professional services. There are 168,000 in Culture and leisure, representing 50 per cent of all workers in the sector.
3. But night work does not pay well for everyone. Over half – 53 per cent – of night time employee jobs in Culture and leisure pay less than the London Living Wage hourly rate.
4. And almost twice as many employee jobs in night time occupations earn below the London Living Wage – 531,000 – compared to employee jobs across all other occupations – 275,000.
5. Employee jobs in night time industries are growing faster than employee jobs in London’s wider economy. Between 2001 and 2017, the sector grew by 2.2 per cent a year compared to 2 per cent overall.
6. Two thirds - 65 per cent - of Londoners are regularly active at night. People do lots of different things, like personal errands, socialising, and enjoying cultural facilities.
7. Cost is the main barrier to enjoying culture and leisure activities at night. This is the case across all income groups of Londoners. Over a third of Londoners say it is too expensive to go out at night.
8. Londoners are drinking alcohol less regularly too. The number of people who drank alcohol in the last week in England has dropped from 67 per cent in 1998 to 58 per cent in 2016. Proportionately fewer Londoners consume alcohol than people across Britain.
9. Alcohol-related offences fell by 51% between 2010/11 and 2017/18, and now make up just 4.3 per cent of all crime at night.
10. This means there is relatively little health service activity due to things happening at night. For instance, there are fewer hospital A&E attendances for assault than there are for road traffic accidents or sports injuries.

Night time industries and occupations are parts of an economic category with a higher than average representation of night workers. The definition has been developed for this research, and a sub-category is Culture and leisure.

1.2 Main results

London is a diverse and dynamic city at night. It can rightly claim to be a city that never sleeps. Workers in offices, hospitals, depots and venues, keep the city running 24/7. Londoners and visitors revel in the city’s food, culture and public spaces at night. And millions of people are busy with household errands, attending classes and community groups and socialising well after dark.

The demand for night time activities in London looks set to increase over the next 20 years. London is a growing city, with the population expected to reach 10.8 million by 2041 - up from 8.8 million in 2017. At the same time London remains one of the most visited cities in the world. Demand for visitor accommodation in London is projected to reach 196.4 million nights by 2041, up from 138.5 million nights in 2015. The number of people who enjoy

London's nightlife is increasing and London's jobs market is growing as fast at night as during the day¹.

London is not a city that follows a single rhythm. People work, rest and play whatever time it is. As some go to sleep, others are starting work. As those coming off a shift look for somewhere to get a hot meal, others are going to a cinema, museum late or club.

There are 1.6 million night time workers in London. That is a third of all who work in the city. This includes 191,000 workers in Health, and 178,000 in Professional services. Cultural and leisure activities has 168,000 night workers, representing 50 per cent of all in the sector.

Over half – 53 per cent - of employee jobs in Cultural and leisure industries pay less than the London Living Wage hourly rate. These industries are a sub-category of night time industries, and are industries with an above average number of night time workers.

Almost twice as many employee jobs in night time occupations earn below the London Living Wage – 531,000 – compared to jobs across all other occupations – 275,000.

Night time occupations are those with an above average representation of night time workers and have been defined for this report.

The night time category, of night time industries and occupations, has more shift working, and part-time work. Alongside low pay, these are risk factors for individual wellbeing, health and lifestyle.

There has been higher growth in employee jobs throughout the city in night time industries. Between 2001 and 2017, the sector grew by 2.2 per cent a year compared to 2 per cent overall.

Outside of work, 65 per cent of Londoners are regularly active at night. Of these, 42 per cent are shopping or doing personal errands. The same proportion are taking part in social or wellbeing activities. Londoners are more likely to be night owls than the rest of the UK population. Over half - 54 per cent - of Londoners say they usually go to bed after 11pm (the UK figure is 48 per cent). A quarter often go to bed after midnight. Younger people tend to be most active at night too. Almost half of all night time trips in London, whether by foot, in a car, or by public transport, are made by people aged 25-44.

Londoners' changing lifestyles brings more demand for London's economy and infrastructure to work 24/7 and diversify. Londoners like how the city's night time offer has developed. There are more things to do at night, with, for example, more places offering food. Across all groups, most Londoners are active at night. Only 27 per cent say they are not particularly interested in going out then. Demand for night time activities looks set to increase over the next 20 years. Current trends suggest there will be a further drop in alcohol bought in pubs and restaurants, and further demand for a wide range of amenities at night.

However, relative to its large population, there are fewer cultural facilities in London than many other European cities. Some town centre areas may have little in terms of certain

¹ This is based on the trend in the numbers of workers and night workers. Growth in employee jobs in night time industries has been faster than for London as a whole, but the classification of these industries also includes day workers.

types of venues, such as cinemas or theatres. There has also been a big drop in LGBT+ venues, grassroots music venues (GMVs), night clubs and pubs over the last ten years.

- In 2017 there were 53 LGBTQ+ venues, down from 125 in 2006
- In 2016 there were 94 GMVs, down from 144 in 2007
- In 2017 there were 570 clubs, down from 880 in 2001
- In 2017 there were 3,530 pubs, down from 4,835 in 2001

Numbers are however starting to stabilise for LGBT+ and grassroots music venues. At the same time, the number of pubs continues to decline. However employment in pubs is growing. This may be because they are diversifying their offer to include food and other activities.

Four out of five visitors to London say culture and heritage is the main reason for their trip. London is the third most visited city in the world for international visitors. Most visitors remain in the centre of London where most hotels are found, and there is a concentration of cultural and leisure venues. Visitors mainly experience nightlife in places like the West End and London Bridge. Only 9 per cent have been to areas such as Clapham, Brixton and Peckham. London's main competitor is New York. Other international cities that rate highly with visitors include Hong Kong, Paris, Berlin and Sydney.

Alcohol is becoming less important. There has been a long-term fall in alcohol consumption when out at night, and a long-term move towards less frequent drinking. For all adults in England, the number of people who drank alcohol in the last week dropped from 67 per cent in 1998 to 58 per cent in 2016. For those aged 16-24, the drop has been even bigger - from 65 to 46 per cent.

Police figures also show a falling role for alcohol at night. Across London, the number of alcohol-related recorded offences at night fell by 51 per cent between 2010/11 and 2017/18. Alcohol-related reports make up only 4.3 per cent of all recorded offences at night. Likewise, only a small proportion of health service activity is due to things happening at night. For example, there are fewer hospital A&E attendances for assault than there are for road traffic accidents or sports injuries.

Over a third of Londoners say it is too expensive to take part in activities at night.

This is the top issue for all Londoners, regardless of how much they earn. The cost of some night time activities, like visiting a restaurant or attending a cultural activity, has been rising faster than inflation. Visitors' experience shows that London can do better in terms of value for money and inclusivity. 51 per cent agree that London's nightlife is good value. Under half - 45 per cent - believe it is easy to find free evening and night time events in the city.

Improvements in night travel are a key priority for those Londoners who go out most at night. Around a quarter of journeys on public transport take place during the night. Tube and bus services are seeing large growth at night for both work and leisure travel. Across the week, the use of public transport after 10pm and from 4-7am has grown. The launch of the Night Tube on Friday and Saturday nights in late 2016 has boosted public transport provision. However, 47 per cent of visitors were unaware of the Night Tube service when surveyed in September 2017.

Recorded crime is concentrated in similar areas of London whatever the time of day. This is because people gather in these areas, like central London and town centres throughout the day. However, we cannot say if the prevalence of crime is more likely at night. This is because we lack footfall data to tell us how many people are in an area at any one time.

Alongside the big drop in alcohol-related offences at night, there is less violent crime at night in London than during the day. Indeed, there is less recorded crime altogether at night than during the day. However, despite the overall safety of London at night, some groups feel that London is less safe than it is. Around one in five – 19 per cent – of Londoners say they feel unsafe in London at night. This figure jumps to 23 per cent for women and people in households on less than £20,000 a year, and to 27 per cent for disabled people.

Around the world, there is a growing trend to plan for the economy, culture and liveability of cities at night. At least 19 cities now have independent bodies to represent the night time industries; Night Czars or Night Time Mayors; or night time offices within government.

There is also more academic research on cities at night, particularly around the culture and leisure economy. However, there are big gaps in the data - not just in London - but around the globe. This is a challenge for researchers. Some cities have started to address this. For example, Berlin is mapping and auditing its nightlife venues, while San Francisco has set up a Late-Night Transportation Working Group.

London boroughs², including Hackney and Westminster, have commissioned cost-benefit analyses of their night time economies. However, there are major limitations in data specific to night time hours, and a very limited evidence base on what works. Boroughs have not had, for example, available to them the range of data used in this report. So, studies currently provide limited insights. In particular, there is a lack of cost-benefit evidence to compare the relative merits of schemes like Best Bar None, the Late Night Levy, Business Improvement Districts, and Cumulative Impact Zones. At present, we have a limited evidence base on how best to reduce alcohol-related harm and maintain the night time offer.

Indeed, at present there are limited examples of monitoring and evaluating night time policies worldwide. A further example of a major data gap is a lack of a robust measure of night time economic output. As the study of cities at night develops, we expect more data will be gathered and analysed, and policies developed. For example, the use of anonymised ‘big data’ such as card payment data, could enable a much deeper understanding of the night time population. This includes demographic information, what people are doing, and where they’re travelling to and from.

The Office for National Statistics (ONS) has set up a Data Science Campus to analyse new data sources in fresh ways. A joint workshop with the Greater Manchester Combined Authority looked at a range of non-traditional data sources to better understand the night time economy. A joint team from ONS and Barclays will carry out analysis to see if we can come up with new economic indicators using a range of Barclays’ data³. If successful, there might be an opportunity to develop the analysis of card payment data in ways to make it more relevant to studying cities at night.

Another opportunity might be to conduct and publish an evaluation of the Night Tube to understand better night time travel patterns.

Finally, we lack evidence on how well different groups feel able to contribute to London’s nightlife, and take part in it. For example, there are media stories about how gigs by BAME

² This report uses the term borough to include the City of London, which is a local authority

³ See [The month that was – May 2018 | Data Science Campus](#)

(black and ethnic minority) artists have been cancelled without due reason. Also, that some BAME groups have been denied entry to certain night clubs because of their skin colour.

In summary, further research into London at night will benefit London's vision to become a 24 hour leading global capital.

2 Introduction

2.1 Research overview

This evidence base offers a broad overview of what happens in London at night and how this has changed - and is changing - over time. It also considers what people do at night, their concerns, how they'd like future night time London to look, and the impact of London's changing population.

Since October 2016, we've carried out the following research:

- GLA City Intelligence, Opinion Research
 - Qualitative research: focus groups, interviews and guided online discussions⁴
 - Quantitative research: November 2016 and March 2018 representative polling of 1,000 Londoners
- GLA City Intelligence, Economic Research
 - Desktop research into several areas: workers, residents and visitors, industries, travel, safety, externalities and international comparisons

The Opinion Research has been published alongside this report⁵, and the main findings have also been incorporated here.

This evidence base has supported the work of the Night Time Commission, and the Night Czar. The Commission has been running a consultation process and collected data via its partner organisations. We have incorporated some of this evidence into this report.

2.2 Acknowledgements

We would like to thank those people who have contributed their time and expertise in the creation of this report. They include: the Chair of the London Night Time Commission Kate Nicholls; the Steering and Research and Data Groups of the London Night Time Commission, comprising Hannah Barry, Paul Davies, Jan Hart, Angela Harvey, David Luton, Shakira Martin, Alan Miller, Rommel Moseley, Lucy Musgrave, Jo Negrini, Alex Williams, Andrew Cooke, John Larson, Marion Roberts, Colin Shepherd and Tony Sophoclidis; the former Chair of the Night Time Commission Philip Kolvin QC; ONS London statisticians; London & Partners; Transport for London and University College London.

2.3 Definition of 'night'

GLA defines the 'night' as everything that happens between 6pm and 6am. London's 'nightlife', what people do for culture and leisure, is an important part of this. However, for the first time, this study considers all industries and occupations – from healthcare to culture and hospitality to logistics – that operate at night.

To understand better night working, GLA Economics⁶ has established a night time category of industries and occupations with relatively high proportions of night workers. It includes the sub-categories of:

⁴ There were six focus groups with 46 participants in total between December 2017 and January 2018

⁵ See [London Datastore](#)

⁶ The economics research arm of GLA City Intelligence

- Cultural and leisure activities
- Activities which support night time cultural and leisure activities
- 24-hour health and personal services
- Activities which support wider social and economic activities

As in every part of the economy, the night time category includes day and night time workers. It is not possible to come up with a definition which only identifies night time workers. However, the definition captures 67 per cent of London's night time workers.

The Main Report provides the definitions and methodology of the night time category. This analysis has been done using the Labour Force Survey (LFS). It is the only ONS survey with information on working hours for individuals or businesses.

To see if there is further scope to identify night time activity, the GLA City Intelligence Unit has been looking at using Big Data. If realised, this could allow a much deeper understanding of the night time population. For example, including demographic information, what sort of things people are doing, and where they're travelling to and from.

The methodology to define the night time category applies both London and UK-wide. An advantage of a UK-based approach is that it can be, and has since been, adopted more widely. The ONS has recently produced analysis for the Greater Manchester Combined Authority on this basis⁷. It provides estimates for the night time category which can be directly compared with London's analysis in this document.

2.4 Organisation of the report

The organisation of the remainder of the report is:

- Chapter 3 – London's night time workers
- Chapter 4 – London's residents and visitors
- Chapter 5 – London's night time industries
- Chapter 6 – London's night time cultural venues
- Chapter 7 – London's night time travel
- Chapter 8 – Safety in London at night

Each chapter has main findings. The Executive Report, which accompanies this report, provides a summary of these findings in the Key Findings section.

Other annexes provide background analysis which provide additional material and context to the main paper, and are summarised in the main paper. The annexes are:

- Annex A – Methodology to define a night time category of industries and occupations
- Annex B – Opportunities for urban data to give a more complete picture of London's night time offer
- Annex C – International evidence on the night time offer
- Annex D – Public transport journeys within London
- Annex E – Estimating the costs and benefits of night time activities
- Annex F – Limitations of police crime and ambulance service attendance data

⁷ Office of National Statistics, '[Night Time Economy businesses and employees in Greater Manchester boroughs and MSOAs, 2001 to 2017](#)', 2018

3 London's night time workers

3.1 Introduction

Recent publications on the scale and nature of London's night time economy have focused solely on specific parts of the economy, and particularly Cultural and leisure activities⁸. The Mayor of London in setting out his plans for London as a 24-hour city⁹ takes a broader view that includes all the sectors of the economy, and everyone who routinely works after 6pm or before 6am.

This chapter looks at trends in the numbers of night time workers across all industries and occupations in the economy, and their personal characteristics. As well as providing contextual material on night time working this also supports the interpretation of findings in later chapters. There is a definition, developed for this report, of a night time category of industries and occupations where there are more likely to be night time workers¹⁰. For workers in this night time category there is a review of the evidence on earnings and working practices and the possible implications for health and wellbeing.

There are questions in the LFS which ask respondents to self-report on working hours. This is the data source used for much of the analysis in this chapter. But, there is no established data source which asks people the exact hours they work, and so this chapter follows a language convention for workers to distinguish between night time workers who work between 6pm and 6am:

- Workers who self-report as working during the night are 'workers at night'
- Workers who self-report as working in the evening are 'workers in the evening'
- Workers who fall into either or both of these categories are 'workers in the evening or night', or equivalently 'night time workers.'

A worker is someone who receives payment for their efforts, and so includes both employees and the self-employed. Any individual may hold down more than one job.

Additionally, a significant proportion of night time workers also work during the day or work shifts, and as there is no simple distinction between night time workers and day time workers the paper employs the language of workers at other times of the day for people who do not do any night time work.

3.2 Main findings

There are 1.6 million night time workers in London across all sectors and occupations of the economy

- This is 31% of the 5.3 million workers in London, slightly higher than for the UK at 29%
- The number of night time workers has increased in proportion with the number of workers in the London economy as a whole over the period 2007 to 2017

⁸ London First/EY, '[London's 24 Hour Economy](#)', August 2016 is one example. Annex E on cost and benefit studies mentions some more.

⁹ See [Building a 24-hour London | London City Hall](#)

¹⁰ The methodology to establish the definition is at Annex A.

Most night time workers are in the sectors and occupations of the economy with more jobs, although these are not the sectors and occupations where night time workers are most likely to work

- There are 191,000 night time workers in Health (34% of all workers) and 178,000 in Professional services (26% of all workers)
- 57% of workers in Accommodation and food services are night time workers
- 54% of workers in Transportation and storage are night time workers
- 44% of workers in Arts, entertainment and recreation are night time workers
- 33% of workers in Administration and support services are night time workers
- Since 2009 the strongest growth in absolute numbers has been in Accommodation and food services, and Administration and support services
- Professional occupations, Associate professionals and technical occupations and Managers, directors and senior officials are the largest occupations in London, and together account for 59% of workers who usually work at night
- 31% of workers within these occupations work at night, which is the same as the London average
- Process, plant and machine operatives are most likely as a single occupation to work in London at night, and 49% do
- Professional occupations; Caring, leisure, and other service occupations; and, Sales and customer service occupations had the fastest growing numbers of night time workers over the period 2007-17
- Cultural and leisure activities has 168,000 night time workers, which is 50% of all workers – see below for explanation of the category

Night time workers have different characteristics to the wider working population

- It is more common amongst male workers to be night time workers
 - 34% of male workers, and 27% of female workers, are night time workers compared to 31% of all workers
 - 62% of night time workers in 2017 were men, and this percentage has remained fairly constant since 2007
 - Amongst ethnic minorities, 36% of male workers, and 30% of female workers, are night time workers, compared to 34% of all workers
- It is more common for BAME workers to be night time workers, and the growth in night time workers has been faster than for white workers, most notably for women
 - 34% of BAME workers are night time workers
 - BAME night time workers increased by 33% between 2011 and 2017, compared with 25% for all night time workers
 - female BAME night time workers increased by 73% between 2011 and 2017, compared to 34% for all female night time workers
- It is most common for working 45-49 year olds and 65-69 year olds to be night time workers, although they are not the largest group of workers
 - 35% of 45-49 year olds are night time workers and 36% of working 65-69 year olds are night time workers
 - 35-39 year olds are the largest group of workers by 5 year age band, and 31% in this age band are night time workers

- For the UK 25–29 year olds are the largest group of night time workers by 5 year age band
- 33% of working residents of inner London, and 29% of working residents of outer London, are night time workers
- The exception is social grade, where there is little variance in working patterns (for everyone of each grade):
 - 24% of ABC1s work at night, and 22% of DEs work at night¹¹

To understand night time working GLA Economics has developed a definition of a night time category of industries and occupations where there is higher than average representation of night time workers

- There are sub-categories of: Cultural and leisure activities; Activities which support night time cultural and leisure activities; 24-hour health and personal services; and, Activities which support wider social and economic activities
- As in every part of the economy there are both workers during the day and at night it is not possible to come up with a definition which only identifies night time workers
 - The definition adopted captures 67% of London’s night time workers
 - It also however captures 44% of London day time workers

The night time category, and even more closely Cultural and leisure activities and Activities which support night time cultural and leisure activities, tightly captures workers where it more common to have working conditions of shift-working, part-time work, and low pay, which are risk factors for individual wellbeing, health and lifestyle

- **There are nearly as many employee jobs in night time industries earning below the London Living Wage as there are jobs in all other industries**
- 53% of employee jobs in industries within Cultural and leisure activities, 34% of employee jobs in Activities which support night time cultural and leisure activities, and 15% of employee jobs in activities outside the night time category have hourly earnings below the London Living Wage
- 72% of part-time employee jobs in industries within Cultural and leisure activities, 73% of part-time employee jobs in Activities which support night time cultural and leisure activities, and 40% of part-time employee jobs in activities outside the night time category have hourly earnings below the London Living Wage
- **Almost twice as many employee jobs in night time occupations earn below the London Living Wage – 531,000 - as jobs across all other occupations – 275,000**
- 59% of employee jobs in occupations within Cultural and leisure activities, 36% of employee jobs in Activities which support night time cultural and leisure activities, and 11% of employee jobs in activities outside the night time category have earnings below the London Living Wage
- 75% of part-time employee jobs in occupations within Cultural and leisure activities, 69% of part-time employee jobs in Activities which support night time cultural and leisure activities, and 37% of part-time employee jobs in activities outside the night time category have hourly earnings below the London Living Wage
- Women and part-time workers in the night time category are more likely to be on low pay

¹¹ See Chapter 4 for analysis

- Around 30% of night time workers in each of Cultural and leisure activities, Activities which support night time cultural and leisure activities, and 24-hour Health and personal social services, and 2% of night time workers outside the night time category
- Around 30% of night time workers in Cultural and leisure activities, and Activities which support night time cultural and leisure activities, and 14% of night time workers in activities outside the night time category work part-time
- While it is relatively uncommon to have a second job. 5% of night time workers have one, as do 3% who only work at other times of day

3.3 Trends in the number of London's night time workers

The starting point of this section is to consider who works at night in terms of their contribution to the economy across sectors and occupations. The analysis contributes to the development of the night time category as set out at Section 3.5 without presuming the parts of the economy where night time activity occurs. By this means it can indicate both the sectors and occupations where there are the most night time workers, where night time working is most prevalent, and trends over time.

According to the LFS¹², 5.29 million people worked in London in 2017. Of these, 31% self-report as usually working during the evening or at night; 1,622,000 people¹³, and so for the purposes of this analysis are considered to be night time workers, that is they meet the definition of working some time between 6pm and 6am. Over a third of these individuals, 616,000 say they work at night, while almost all, 1,549,000 say they work in the evening. This indicates that the majority of people who say they work at night also say that they work in the evening.

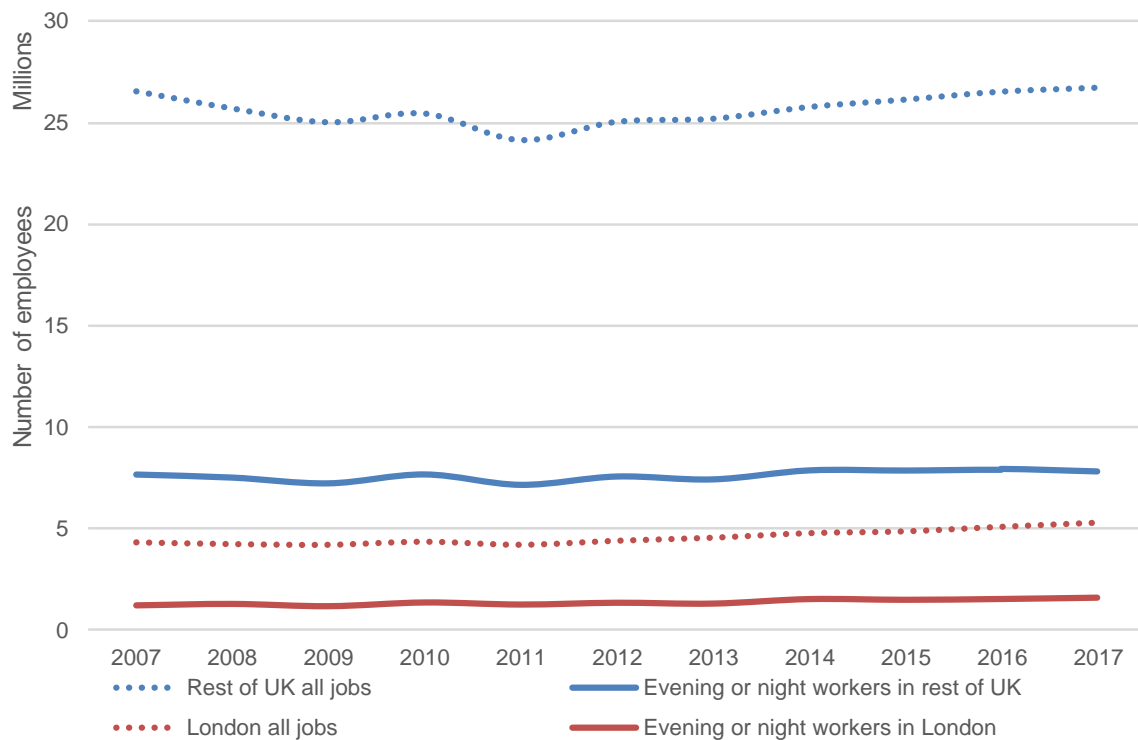
This picture is similar across the UK where in 2017 7.83 million people usually work during the evening or night, out of a total working population of 26.75 million. The proportion of individuals working during the evening or at night is therefore slightly lower than in London, at 29%.

Despite suggestions that technological advances and trends towards more flexible working have changed working patterns, the proportion of night time workers (at least in the characterisation of their working patterns according to the LFS) has remained at around 30% over the past decade, as shown in Figure 3.1, both in London and the rest of the UK. With a rising working population this means that the number of night time workers in London and across the UK has been rising as the overall number of workers has been rising.

¹² Many of the figures and tables in this chapter contain statistical data from the ONS Labour Force Survey which is Crown Copyright. The use of the ONS statistical data in this work does not imply the endorsement of the ONS in relation to the interpretation or analysis of the statistical data. This work uses research datasets which may not exactly reproduce National Statistics aggregates.

¹³ The LFS asks about time of work in the April-June quarter of the survey. This is classified as variables USUWRK2=1 or USUWRK3=1, so it is possible to estimate separately workers at night, and workers in the evening. Respondents to the survey are asked questions over five quarters. Some individuals drop out across the quarters, and it is the ONS convention to impute answers in the next quarter for these individuals by bringing forward answers provided in previous quarter. As a consequence, the survey records answers for the April-June quarter for individuals who did not respond in that quarter. These individuals will not have values for the variables USUWRK2 and USUWRK3, as this question is only asked in one quarter, but they can be identified where the variable IOUTCOME=6. This analysis accounts for this discrepancy by applying two grossing factors to provide estimates of all workers at night, or in the evening. The first is provided on the LFS dataset for each individual observation, and would be used in any analysis to estimate an actual population. The second is to apply the ratio of all workers to workers where IOUTCOME does not have value (after applying the first grossing factor). The use of the second factor ensures that estimates of evening and night workers are on a consistent basis with estimates for all workers.

Figure 3.1: Workers and night workers, London and in the rest of the UK, 2007-2017



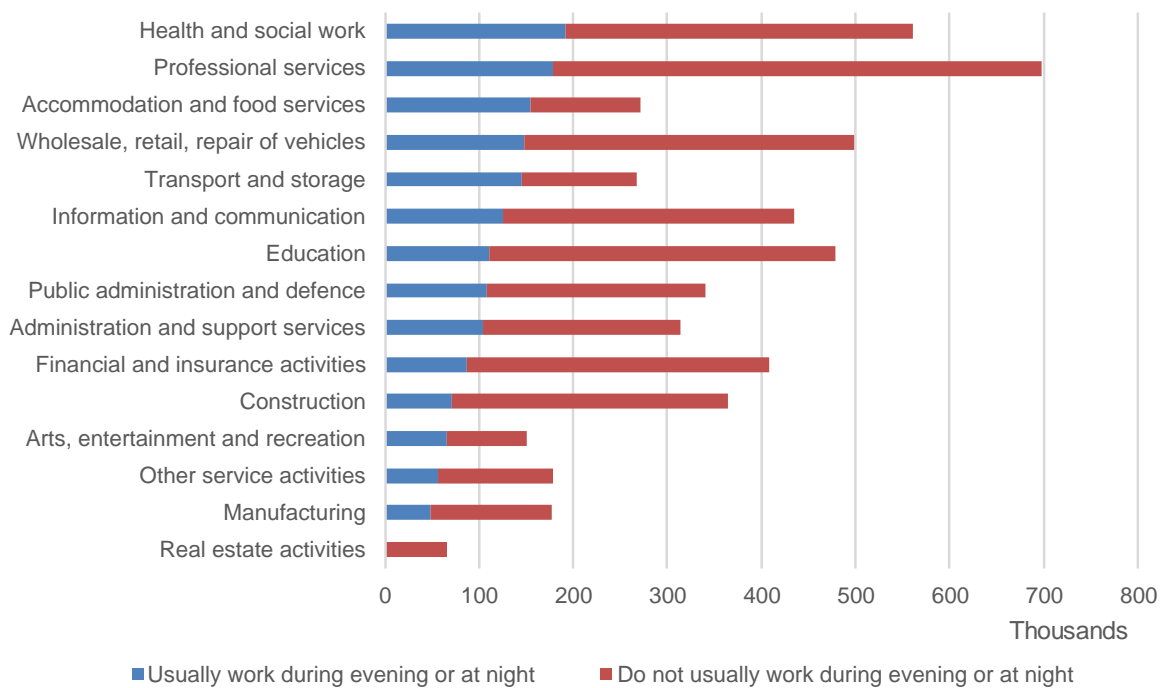
Source: Labour Force Survey, April-June 2007-2017

The total number and proportion of individuals in London working in each of the major industrial sectors in London’s economy, and whether they usually work during the evening or at night, is shown in Figures 3.2 and 3.3. Several sectors are not shown in this figure, as they are too small to report at a London level.¹⁴ The total number of people employed in Real estate is shown, but a small sample size prevents the reporting of the number of night time workers. It is striking in that it shows people work during the evening or at night across the whole of the London economy.

Yet certain industries are more likely to have night time workers. In 2017, most London night time workers were in the sectors of Health and social work (191,000, or 34% of all workers) and Professional, scientific and insurance activities (178,000, or 26% of all workers) – as we might expect since these are the two biggest sectors of London’s economy. Other sectors have higher proportions of night time workers. 57% of workers in London’s Accommodation and food services’ sector, 54% in Transportation and storage, 44% in Arts, entertainment and recreation, and 33% in Administrative and support services are night time workers.

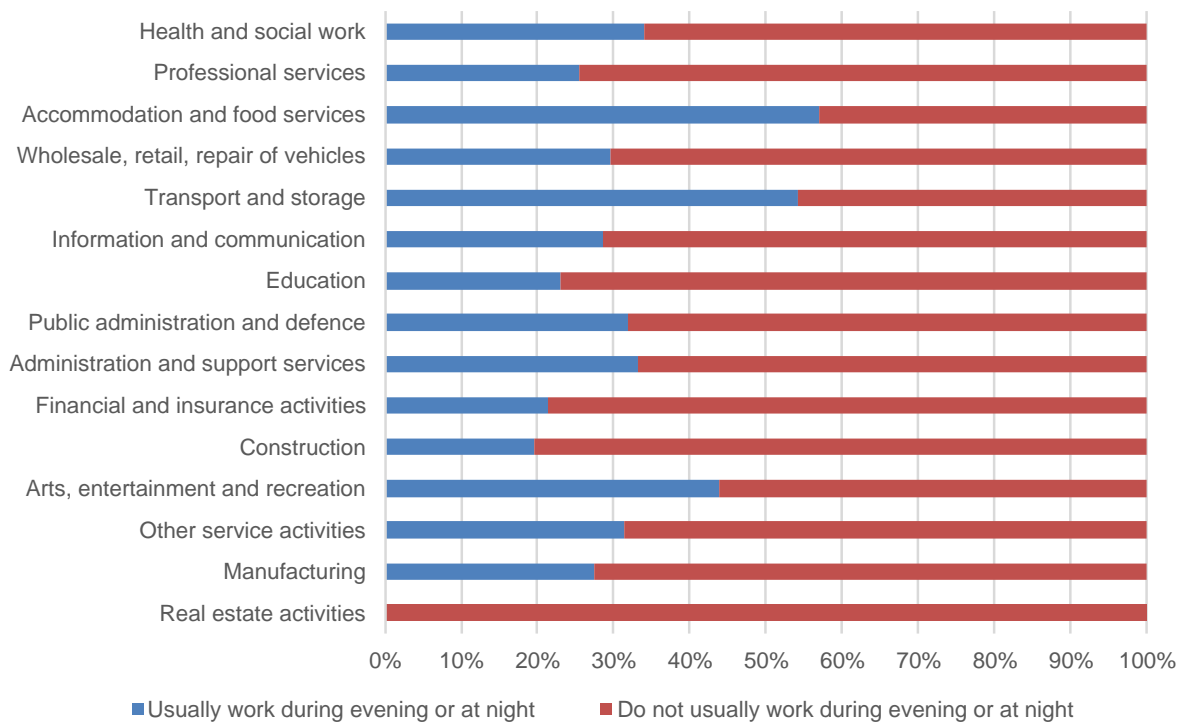
¹⁴ Industries not shown in figure 4.3 include ‘Agriculture, forestry and fishing’, ‘Mining and quarrying’, ‘Electricity, gas, air conditioning supply’, ‘Water supply, sewerage, waste’, ‘Households as employers’ and ‘Extraterritorial organisations’ as the samples sizes are too small to report from the LFS.

Figure 3.2: Numbers of workers in major industry groups in London by usual work pattern, 2017



Source: Labour Force Survey April-June 2017

Figure 3.3: Proportions of workers in major industry groups in London by usual work pattern, 2017

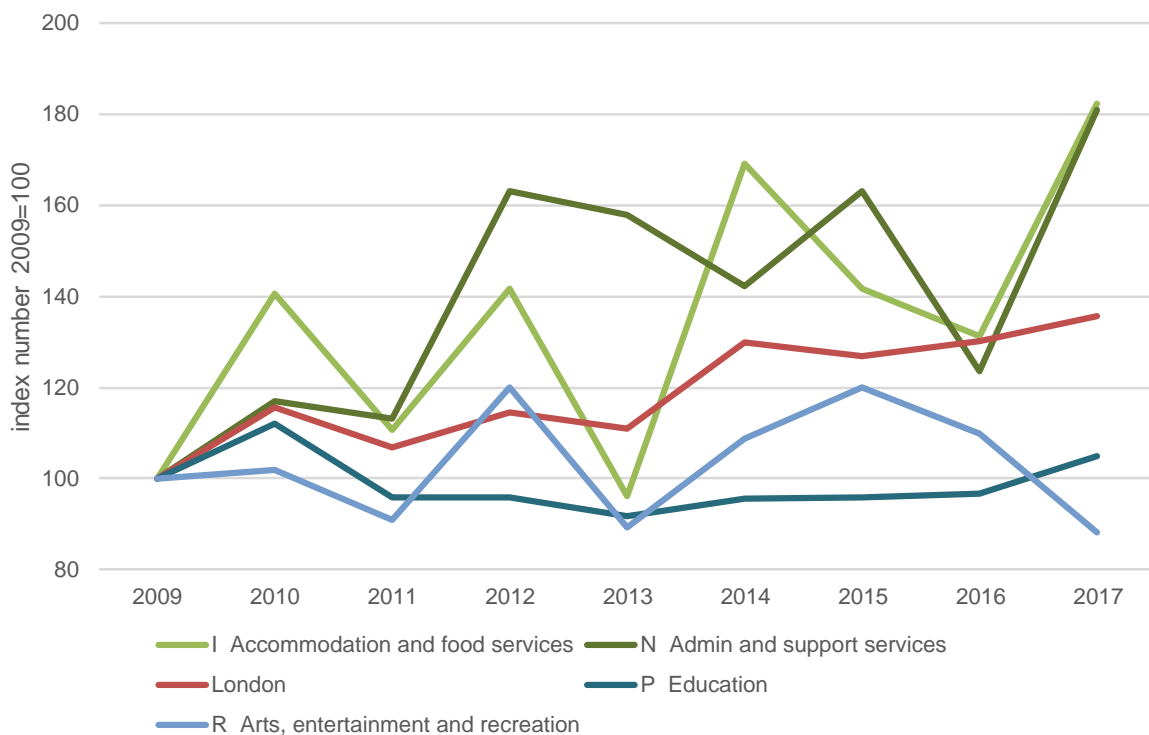


Source: Labour Force Survey April-June 2017

Outside London, a far lower proportion of those who work in ‘Transportation and storage’ work during the evening or night (40% vs 54% in London) and a smaller proportion of the Financial services sector work during the evening or night compared to the sector in London (14% v 21%). 43% of Agriculture, forestry and fishing workers are night time workers – a sector so small in London that it cannot be reported.

While the proportion of London workers who are night time workers has remained broadly the same over the last ten years there has been a shift in the distribution of workers across sectors, Figure 3.4. There has been strongest growth in numbers of night time workers in Accommodation and food services, and Administration and support services, increasing by over 80% between 2009 and 2017. In contrast, there has been almost no growth in night time workers in Education, while numbers in Arts, entertainment and recreation may have fallen, or be broadly flat (although this may be a reflection of sampling variability, as there is a lot of volatility in this series). Across all sectors numbers of night time workers have increased by 36%.

Figure 3.4: Growth in numbers of night time workers, London and selected sectors, 2009-2017, index numbers 2009=100



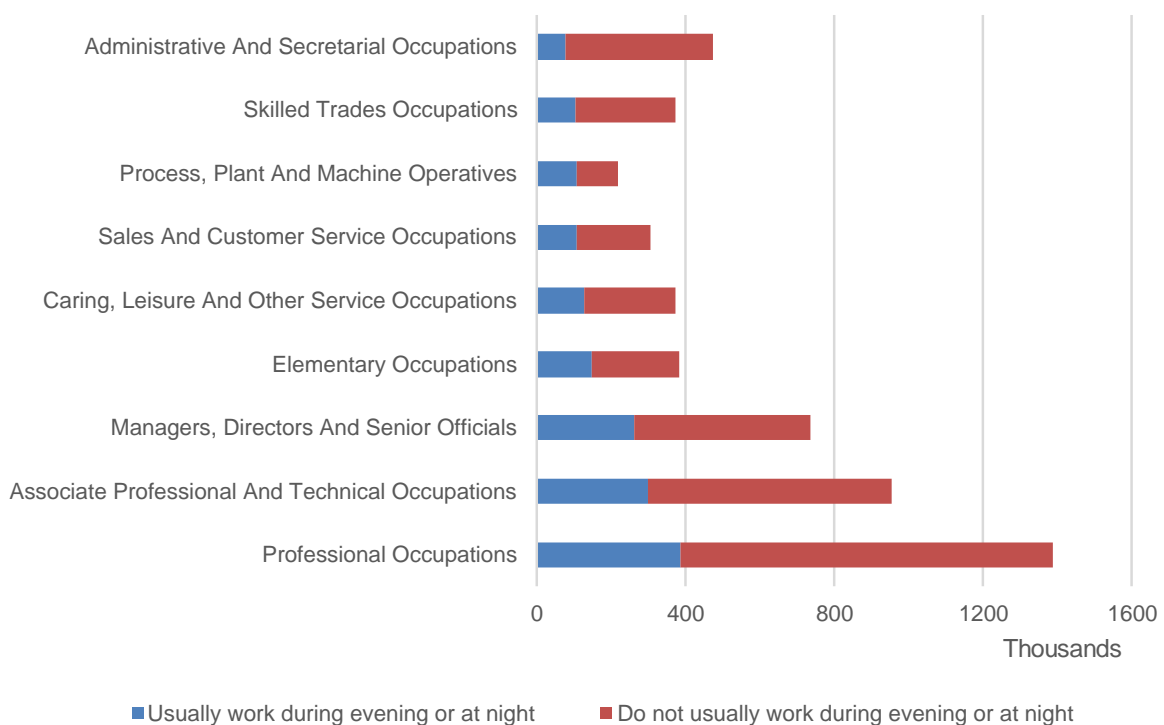
Source: Labour Force Survey, April-June 2017

While the strongest growth has been in sectors with a significant proportion of night time workers, and the numbers of night time workers in Health increased by over 60% between 2009-17, for example, this is not always the case as the numbers in Construction also increased by over 60%.

For most sectors the share of night time workers increased over the period, although noticeably for Professional services, the largest sector in terms of workers and the highest number of night time workers, the proportion declined slightly from 28% in 2009 to 26% in 2017.

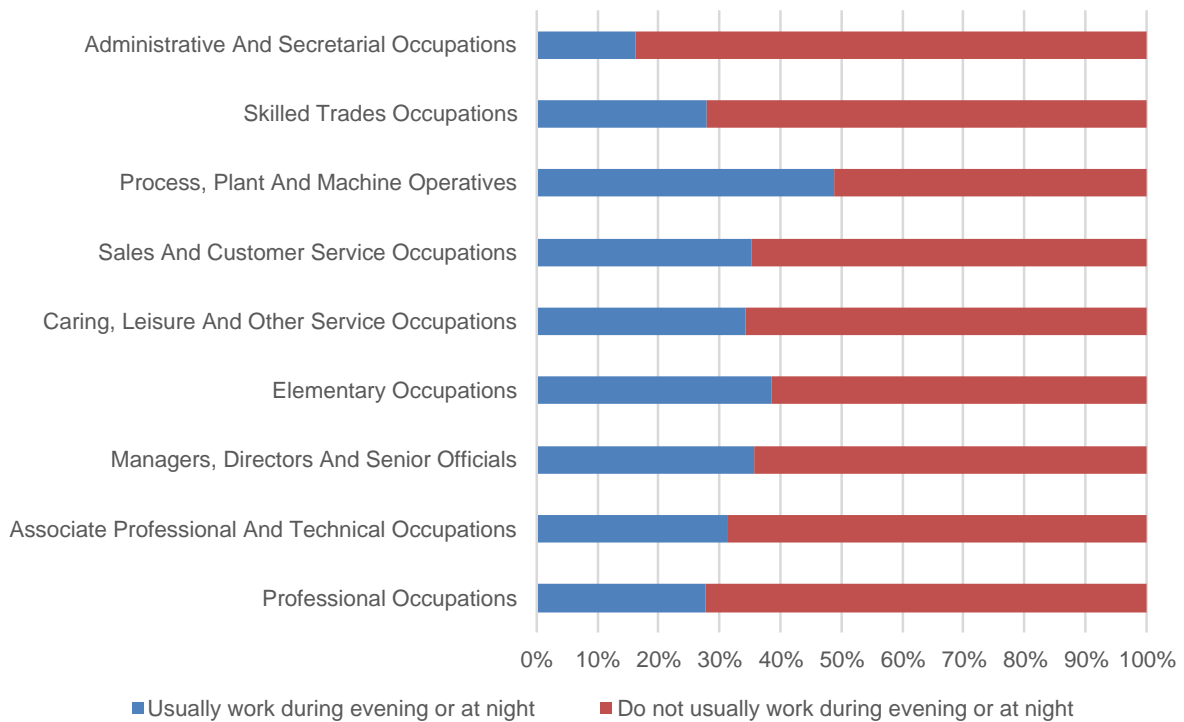
Figures 3.5 and 3.6 show the total number and proportion of individuals in London working in each of the nine major occupational groups, by work pattern. As with sectors, there are night time workers across all occupations. It also presents a different picture. For example, professional occupations are the largest occupational groups in London’s economy; one in four of these professionals usually work during the evening or night. Professional occupations, Associate professionals and technical occupations and Managers, directors and senior officials together account for 59% of workers who usually work during the evening or at night, while within these occupations 31% are night time workers, so little different from the London average. In contrast, almost half (49%) of Process, plant and machine operatives in London are night time workers, which is higher than the rate elsewhere in the UK (39%). And, the lowest proportion of night time workers is amongst Administrative and secretarial occupations at 16%.

Figure 3.5: Number of workers in major occupation groups in London by usual work pattern, 2017



Source: Labour Force Survey, April-June 2017

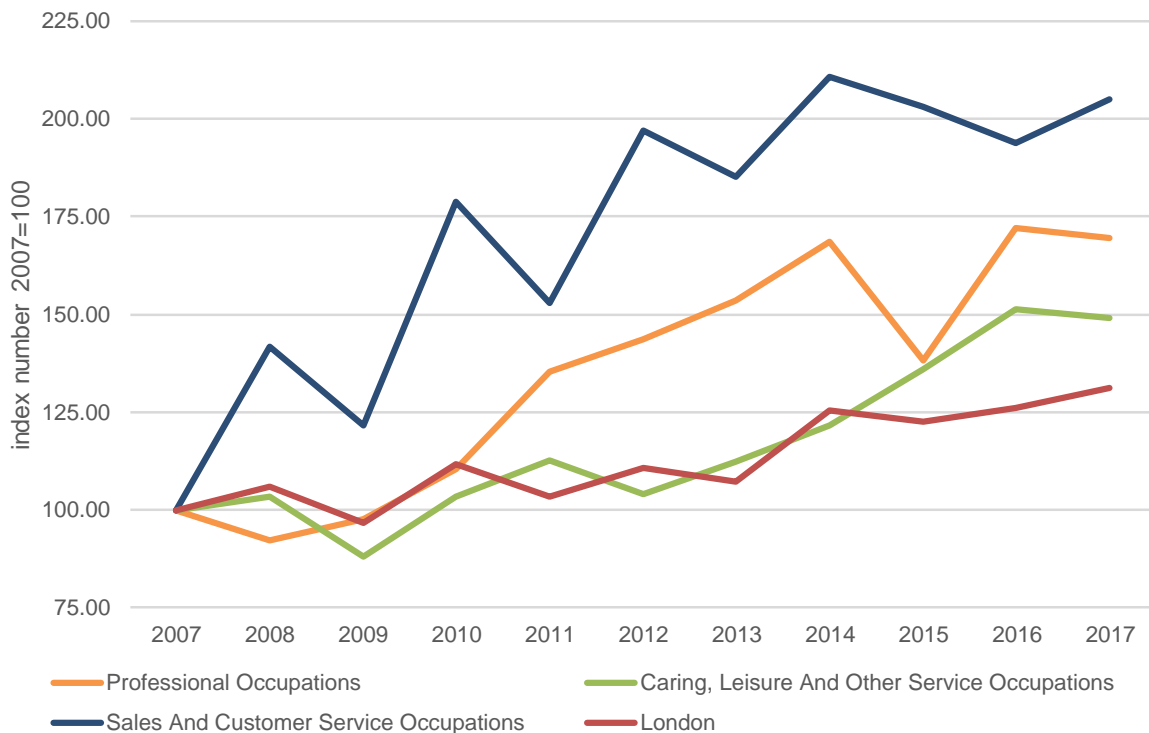
Figure 3.6: Proportion of workers in major occupation groups in London by usual work pattern, 2017



Source: Labour Force Survey, April-June 2017

Only three occupations have had faster rises in the rate of growth in numbers of night time workers than for London as a whole in period 2007 to 2017. These are Sales and customer service occupations, where there was a doubling in night time workers; Professional occupations; and, Caring, leisure, and other service occupations, Figure 3.7.

Figure 3.7: Growth in numbers of night time workers, London and faster growing occupations, 2007-2017, index numbers 2007=100



Source: Labour Force Survey, April-June 2017

That said the proportion of workers in Professional occupations who were night time workers declined over the period from 30% to 28% indicating that the growth in night time workers did not keep pace with the growth in numbers of people in the occupation. There were three other occupations which had a decline in the proportion of workers who were night time workers, including Associate professionals. Of the four occupations with growing proportions of night time workers, the largest percentage point increases were for Sales and customer service occupations rising from 21% to 34%, and Managers, directors and other senior officials rising from 27% to 36% between 2007 and 2017.

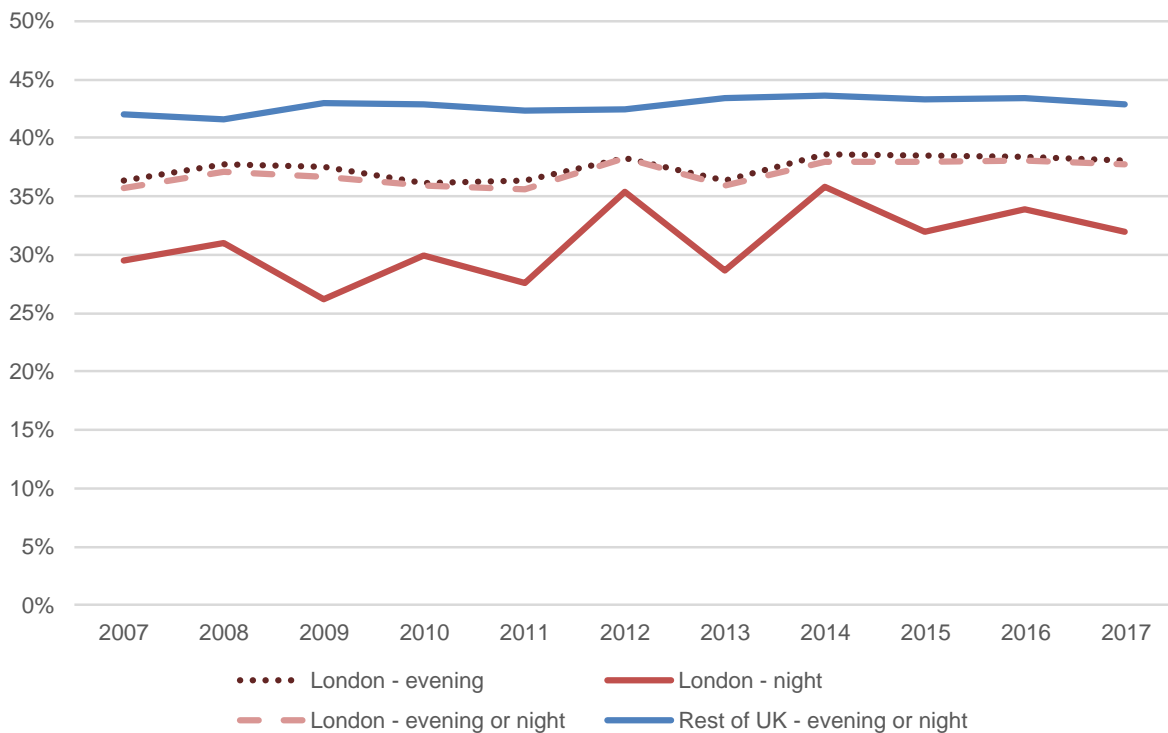
3.4 Personal characteristics of night time workers

This section provides contextual information on gender, ethnicity, age, country of birth, and commuting patterns to provide an overview of who are night time workers, and how they get to work.

3.4.1 Gender

Men account for the majority of night time workers in London, and more so than in the rest of the UK. In 2017, the share of London night time workers who were men was 62%, and for women it was 38%. For the rest of the UK the split is 57% male and 43% female. Women are relatively more common amongst people who usually work during the evening in London, at 38% of workers in 2017, compared to 32% who usually work during the night. There has been little change in these figures over the period 2007-17, Figure 3.8. Around a quarter of female workers are night time workers in London, compared to 31% of all workers.

Figure 3.8: Share of night time workers who are women, 2007-17, London and the rest of the UK



Source: Labour Force Survey, April-June quarters 2007-17

3.4.2 Ethnicity

The number of black and minority ethnic night time workers (BAME) in London has increased from 385,000 in 2011¹⁵ to 550,000 in 2017, Table 3.1. Men represent 325,000 of the total in 2017, and women 224,000. Over this period the growth in BAME night time workers has been faster, at 33%, than for all night time workers, at 25%. There has been especially strong growth in female BAME night time workers, which has increased by 73% between 2011 and 2017 compared to an increase of 34% in all female night time workers.

It is slightly more common for BAME workers to be night time workers. As with the general population it is more common amongst male BAME workers to be night time workers, at 36% of all workers, than female BAME workers, of whom 30% are night time workers. For each of men, women and all night time workers BAME people constitute around a third of workers. This is less than the prevalence of ethnic minorities in the general population¹⁶, as ethnic minorities have a relatively low employment rate, although the share of night time workers is higher than for all workers in London.

¹⁵ The ONS updated its ethnicity questions for the 2011 Annual Population Survey, and results for earlier years will not be consistent because of the change in definition. The variable used in this analysis is ETHUKEUL.

¹⁶ Table 4.1 reports on the ethnic composition of the London and UK populations

Table 3.1: Comparison of BAME and others for night time and all workers, by ethnicity and gender, London, 2011 and 2017

	BAME			All		
	male	female	all	male	female	all
2017 numbers						
workers at night	146,000	84,000	230,000	419,000	197,000	616,000
workers in the evening	305,000	213,000	518,000	959,000	590,000	1,549,000
workers at night or in the evening	325,000	224,000	550,000	1,011,000	612,000	1,622,000
all workers	896,000	738,000	1,634,000	2,990,000	2,302,000	5,292,000
% change in workers since 2011						
workers at night	34%	81%	48%	27%	56%	35%
workers in the evening	32%	76%	47%	24%	34%	28%
workers at night or in the evening	27%	73%	43%	23%	34%	27%
all workers	30%	37%	33%	23%	28%	25%
share of all workers in 2017						
workers at night	16%	11%	14%	14%	9%	12%
workers in the evening	34%	29%	32%	32%	26%	29%
workers at night or in the evening	36%	30%	34%	34%	27%	31%

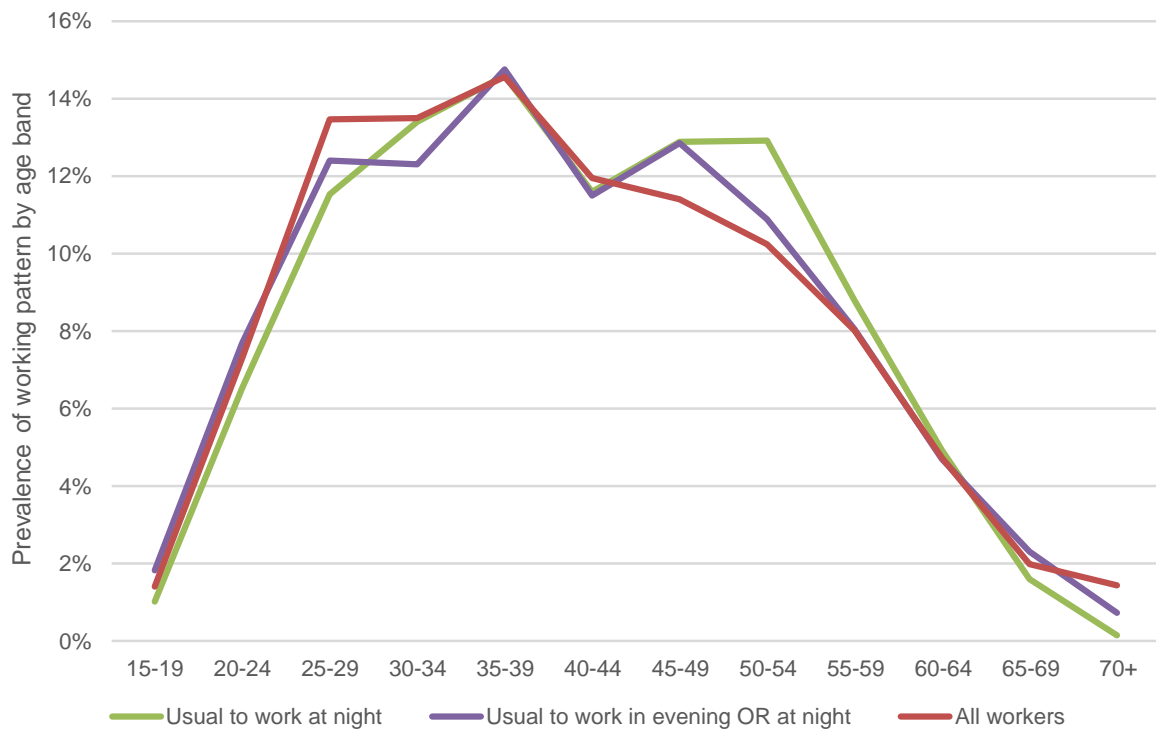
Source: Labour Force Survey, April-June quarters 2011 and 2017

For the rest of the UK around 40% of male BAME workers, 30% of female BAME workers and 36% of all BAME workers are night time workers, so similar to London. While BAME night time workers account for around 10% of all night time workers, as ethnic minorities are much less prevalent in the general population outside London.

3.4.3 Age

Figures 3.9 and 3.10 report the age profile of workers by work pattern by time of day for London and the rest of the UK respectively. In London, it is more common for 35-39 year olds both to be working, and to be a night time worker than other age bands, at 15% of all workers for each working pattern. It is relatively more common for some older age groups to be night time workers than workers at other times of day – for example 45-49 year olds represent 13% of night time workers, and 11% of all workers, while 35% of workers in this age band are night time workers (compared to 31% of 35-39 year olds), Figure 3.9.

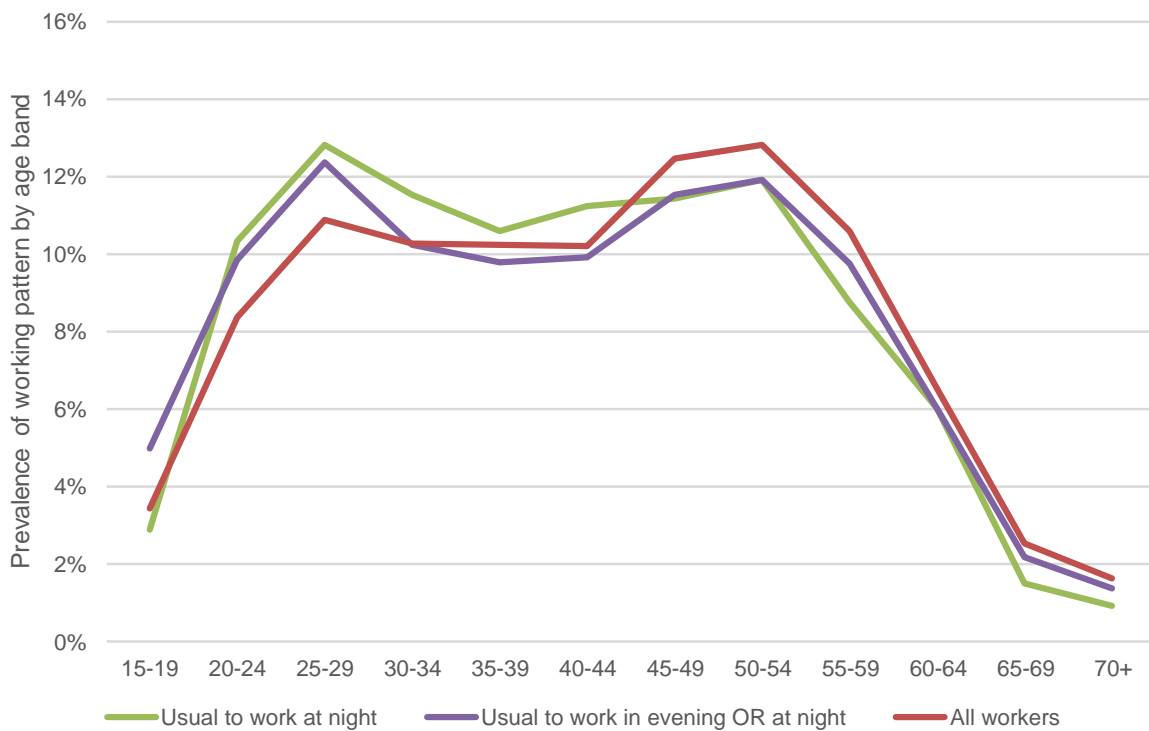
Figure 3.9: Age profile of London workers in 2017, by usual work pattern by time of day



Source: Labour Force Survey, April-June 2017

For the rest of the UK it is more common for 25-29 year olds to be night time workers than other age groups, while amongst all workers the largest group is 50-54 year olds, and it remains comparatively common for night time workers to be in this age band as well, Figure 3.10.

Figure 3.10: Age profile of UK workers outside London in 2017, by usual work pattern



Source: Labour Force Survey, April-June 2017

3.4.4 Country of Birth

Of the 1.62 million night time workers in London in 2017, 1.23 million were born in the UK, 223,000 born in the European Economic Area (EEA)¹⁷, and 173,000 born elsewhere. The current composition of the night time workers in London is very similar to that for all workers, where in both cases 76% were born in the UK. It is similar for workers elsewhere in the UK, where around 90% of all workers, and night time workers were born in the UK, reflecting that it is more common for international migrants to locate in London than elsewhere.

Growth in all workers in London over the period 2011 to 2017 has been higher for EEA-born workers at 71%, than UK-born workers at 24%, while there has been a decline in the number of workers from other countries. Growth in EEA-born night time workers has been faster at 87%, while 28% of EEA-born workers are night time workers, slightly lower than for all workers in London, Table 3.2.

¹⁷ The EEA is European Union countries and Iceland, Liechtenstein, and Norway

Table 3.2: Comparison of country of birth for night time and all workers, London and rest of the UK, 2011 and 2017

Country of birth	London				Rest of UK			
	UK	EEA	Rest of world	All	UK	EEA	Rest of world	All
2017 numbers								
workers at night	489,000	66,000	61,000	616,000	2,778,000	286,000	129,000	3,193,000
workers in the evening	1,179,000	211,000	159,000	1,549,000	6,531,000	469,000	227,000	7,228,000
workers at night or in the evening	1,227,000	223,000	173,000	1,622,000	6,999,000	565,000	264,000	7,827,000
all workers	4,005,000	792,000	494,000	5,292,000	24,541,000	1,517,000	687,000	26,745,000
% change in workers since 2011								
workers at night	38%	109%	-15%	35%	12%	115%	7%	17%
workers in the evening	27%	91%	-8%	28%	4%	72%	-4%	7%
workers at night or in the evening	26%	87%	-6%	27%	6%	86%	1%	9%
all workers	24%	71%	-7%	25%	9%	74%	2%	11%
share of all workers in 2017								
workers at night	12%	8%	12%	12%	11%	19%	19%	12%
workers in the evening	29%	27%	32%	29%	27%	31%	33%	27%
workers at night or in the evening	31%	28%	35%	31%	29%	37%	38%	29%

Source: Labour Force Survey, April-June quarters 2011 and 2017

Last year GLA has submitted evidence to the Migration Advisory Committee¹⁸ on the composition of the London workforce by area of birth. GLA Economics also issued a publication this year¹⁹. For convenience some of that evidence is brought together here, and provides some insight on the degree to which sectors where night time working is prevalent are also sectors where there is a concentration of EEA-born workers. This used official data provided by the ONS²⁰.

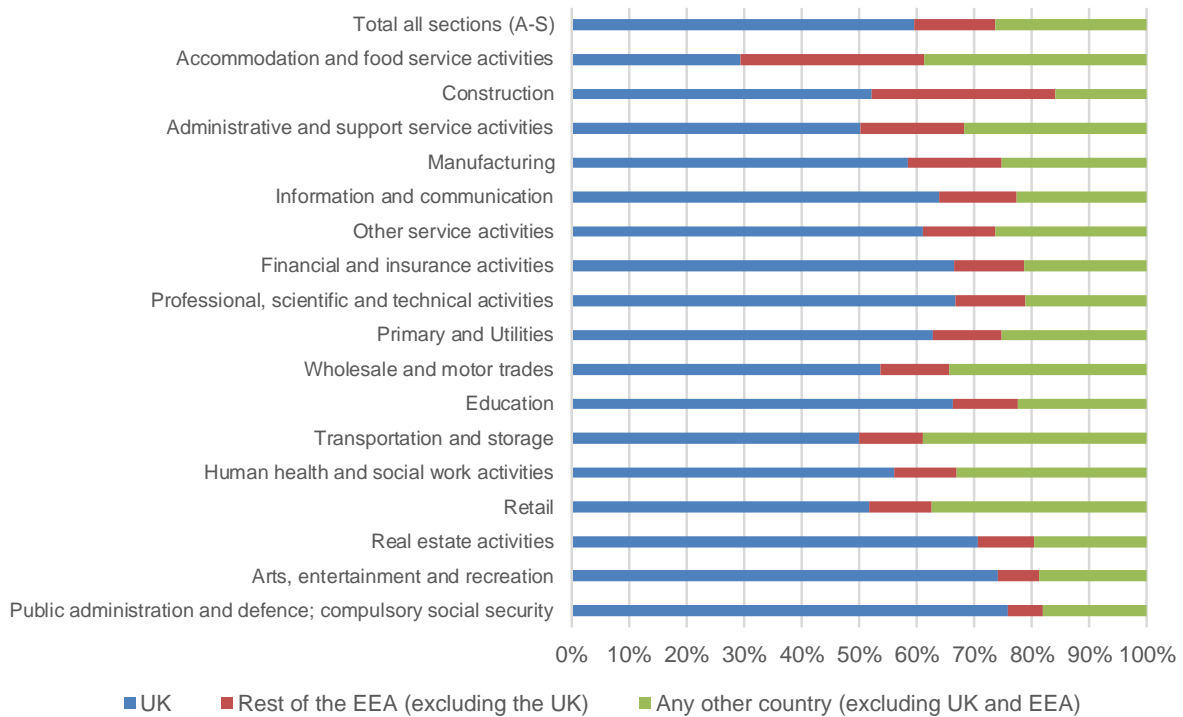
EEA workers account for a particularly high share of the London labour force in certain industries. Figure 3.11 shows a breakdown of jobs by industry and country and area of birth. Sectors making particular use of labour from EEA-born individuals include Accommodation and food services and Construction. In both cases around a third (32%) of jobs in London were held by workers born in the rest of the EEA in 2016. Other industries with an above average share of jobs filled by EEA workers are Administrative and support service activities and Manufacturing (18% and 16% of jobs respectively); while the sectors with the lowest share of EEA workers are Public administration and defence and Arts, entertainment and recreation (6% and 7% of jobs).

¹⁸ See [MAC Call for Evidence on EEA workers in the UK labour market | London City Hall](#)

¹⁹ See [EEA workers in the London labour market | London City Hall](#)

²⁰ There were other responses to the MAC, which may have used data from other sources, and which may not be consistent with the results provided here. See [Accommodation and hospitality: call for evidence responses - GOV.UK](#)

Figure 3.11: Percentage of jobs by industry and country/area of birth, London, 2016



Source: ONS Annual Population Survey

Examining industry codes in more detail shows that EEA workers make up a much higher share of workers in certain sub-sectors in London. Table 3.3 sets out the 5-digit Standard Industrial Classification (SIC) industrial sub-classes where there is 95% probability of more than 14% of jobs being done by a worker born in the rest of the EEA. Some of these detailed industry groups are relatively small (e.g. Translation and interpretation activities), but others represent a more significant share of the labour market. This includes Licensed restaurants (30,000 or 40 per cent of jobs are held by EEA-born workers in this sector in London), Construction of domestic buildings (23,000 jobs or 31%), and Hotels and similar accommodation (22,000 jobs or 47%).

Table 3.3: Industrial sub-classes where there is 95% probability of more than 14% of jobs being done by a worker born in an EEA country, London, 2014 to 2016

SIC industry description	Total number of jobs	Born in an EEA country (excluding UK)	
		Number	%
Licensed restaurants	75,000	30,000	40%
Construction of domestic buildings	74,000	23,000	31%
Hotels and similar accommodation	47,000	22,000	47%
General cleaning of buildings	57,000	18,000	32%
Construction of commercial buildings	60,000	15,000	25%
Painting	20,000	9,000	44%
Hairdressing and other beauty treatment	37,000	8,000	21%
Child day-care activities	36,000	8,000	22%
Unlicensed restaurants and cafes	34,000	8,000	23%
Joinery installation	19,000	7,000	37%
Activities of households as employers of domestic personnel	18,000	7,000	37%
Other building completion and finishing	10,000	5,000	48%
Dental practice activities	17,000	5,000	29%
Other specialised construction activities n.e.c.	15,000	5,000	31%
Other cleaning services	11,000	5,000	44%
Freight transport by road	12,000	4,000	30%
Translation and interpretation activities	7,000	2,000	31%

Source: ONS Annual Population Survey

That is, there are some sectors of the London economy, where there is a relatively high proportion of night time workers, and where there are significant numbers of workers from the EEA, namely Accommodation and food services, and Administration and support services. Within accommodation and food services, licensed restaurants, hotels and similar accommodation, and unlicensed restaurants and cafes all have significant proportions of staff born in an EEA country.

3.4.5 Commuting patterns

While there are 1.62 million night time workers in London, there are 1.41 million residents of London who are night time workers. The difference of 0.21 million consists of 289,000 night time workers in London who live outside the city, less 79,000 Londoners who work at night outside London, Table 3.4. There are 1.70 million night time workers who either live or work in London (1.62 million plus 79,000). The majority live and work in the same area of London. 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.

Table 3.4: Commuting patterns of night time workers by London area of workplace and residence, 2017, percentages sum to 100%

<i>residence</i>	<i>workplace</i>			<i>total</i>
	<i>inner London</i>	<i>outer London</i>	<i>elsewhere</i>	
inner London	31%	3%	1%	600000
outer London	18%	27%	3%	813000
elsewhere	11%	6%		289000
total	1013000	610000	79000	

Source: Labour Force Survey, April-June 2017

Note: Definition of inner and outer London is statistical definition²¹

As a comparison, the corresponding pool of workers at night is 656,000. 202,000 live and work in inner London, while there is another 177,000 people who travel in to work there from elsewhere. The distribution of travel patterns between workplace and residence is similar to that of Table 4.3 with most workers at night living near where they work.

As a comparison there are 3.70 million workers in London who are not night time workers, and 3.20 million working London residents who fall into this category. There are 232,000 Londoners who work outside London, and 703,000 workers who commute into London. Of this wider pool of 3.90 million workers the majority live and work in the same area, Table 3.5. The distribution of travel patterns between residence and workplace are very similar to those for night time workers.

Table 3.5: Commuting patterns of non-night time workers by London area of workplace and residence, 2017

<i>residence</i>	<i>workplace</i>			<i>total</i>
	<i>inner London</i>	<i>outer London</i>	<i>elsewhere</i>	
inner London	28%	3%	1%	1,234,000
outer London	20%	26%	5%	1,964,000
elsewhere	12%	6%		703,000
total	2,321,000	1,348,000	232,000	

Source: Labour Force Survey, April-June 2017

Note: Percentages sum to 100%

It should be noted that not all night time workers will travel to work after 6pm, while there will also be people travelling to work before 6am, who do not work at night.

Of the 1.41 million London residents who are night time workers there are:

- 600,000 inner London residents who are night time workers, which is 33% of inner London workers, and 23,000 work outside London
- 813,000 outer London residents who are night time workers, which is 29% of outer London workers, and 56,000 work outside London

3.5 Night time working by industry and occupation

The next stage of this Chapter is to consider night time industries and occupations. As the earlier analysis has demonstrated people work at night across industries and occupations. GLA Economics worked with the Night Time Commission Data and Research Group to come up with definitions for a category of night time workers, which combined industry and occupation

²¹ See Annex D for an explanation

classifications. These are groups of workers where it is relatively more common to be night time workers than in the economy as a whole. The methodology adopted is at Annex A, and this section provides more context on the definition, and what it means for the classification of workers in terms of populations.

The findings of this Chapter are mostly for the night time category, while in Chapters 5 and 6 the findings are for the sub-category of night time industries. This reflects the data that is available for analysis from different data sources.

The night time category is:

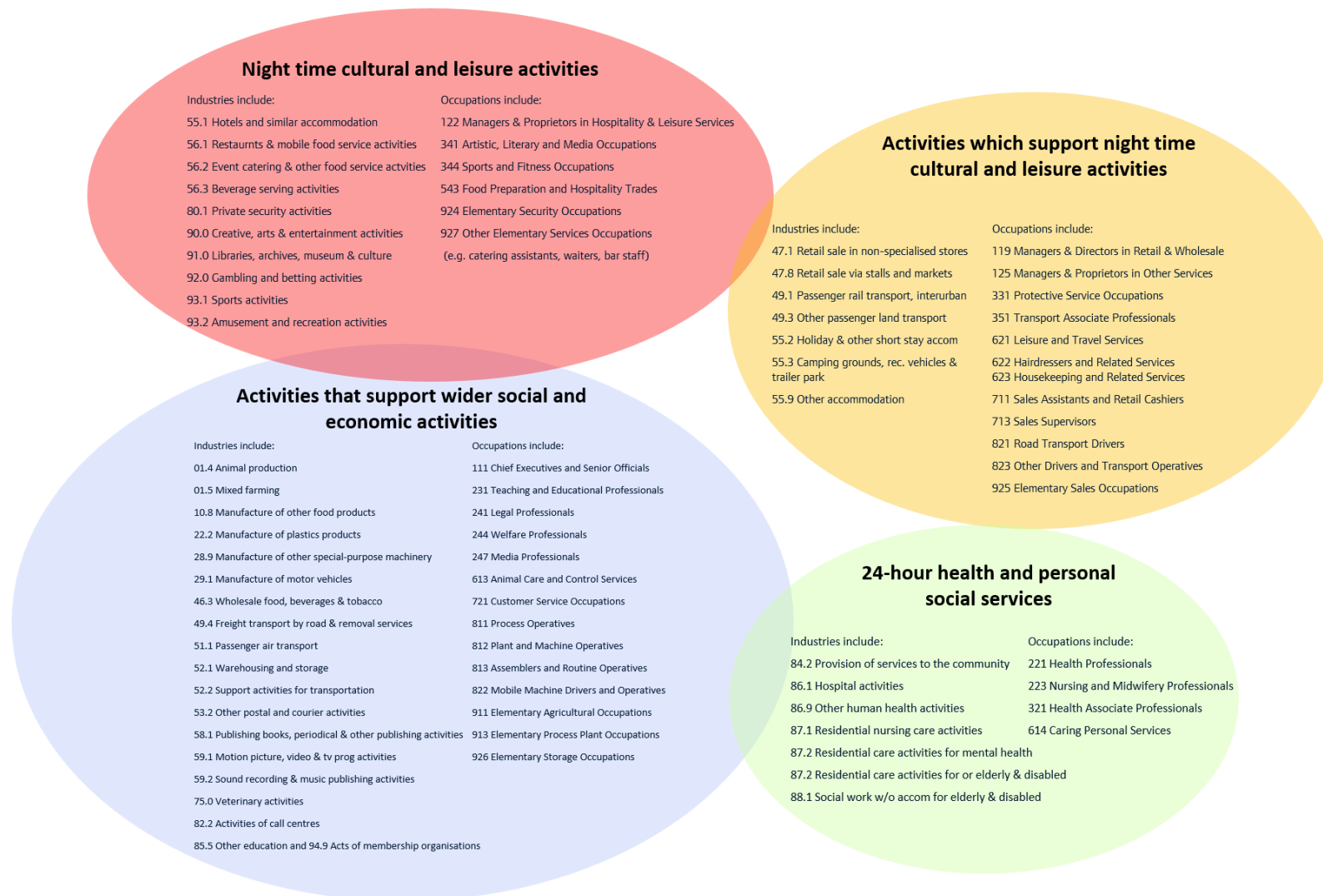
- Cultural and leisure activities
 - Such as hotels, restaurants, pubs, creative, arts, and entertainment activities, sports activity, and private security industries and occupations which support them such as managers in hospitality and leisure, waiters and security staff, and people in sports and fitness occupations
- Activities which support night time cultural and leisure activities
 - Such as retail sales in non-specialised stores, passenger transport industries, and occupations which support them such as managers in retail and wholesale, sales supervisors and assistants, drivers and transport operatives, and protective service occupations
- 24-hour health and personal services
 - Such as hospital and residential care activities, and occupations which support them such as health and nursing professionals, and caring personal services
- Activities which support wider social and economic activities
 - Such as certain manufacturing, and warehousing industries, books, motion pictures and music publishing industries, and occupations such as customer service occupations, process operatives, and teaching, legal, welfare and media professionals

The full definitions, in accordance with the Standard Industrial Classification²² (SIC), and Standard Occupational Classification²³ (SOC), are at Figure 3.12.

²² See [UK SIC 2007 - Office for National Statistics](#)

²³ See [SOC 2010 - Office for National Statistics](#)

Figure 3.12: SIC and SOC categories included in the definition of the night time category



The development of the definition of the night time category provides an evidence-based formulation to identify night time workers. While there is substantial overlap in people covered by the industry and occupation definitions for each sub-category, this is not exact. Some industries and occupations are clearly connected, such as the industry of Manufacturing and the occupation of Process, plant and machine operatives. Some are harder to match up, for example not everyone in the occupation of security worker is employed in the industry of security services. This is because a security worker might work for a pub, rather than being hired by a pub through a security services firm. Further, there will be people who work in a security services firm but whose occupation is managerial or administrative. This analysis therefore considers both industries and occupations in order to capture the breadth of activity in the economy. For the same reason, the night time category has been defined in terms of industries and occupations.

The consequence for the analysis conducted at the level of the night time category is that a night time worker might fall into more than one category, and so there is no simple way to report the number of individuals working in a category as there is for the sub-industries and sub-occupations where there is not overlap in the definitions.

Table 3.6 provides a summary of the extent of the overlaps for night time workers. 15% come within the industry definition for Cultural and leisure activities, and 16% within the occupation definition, while 11% fall within both definitions. Similarly, a high proportion of night time workers in 24-hour health and personal social services come within both the industry and occupation definitions, although the proportions are lower for other sub-categories.

The industry definition captures 48% (100%-52%) of night time workers, and the occupation definition captures 59% (100%-41%), while the definition for the night time category captures 67% (100%-33%) of night time workers. The majority of night time workers meet both the industry and occupation definition.

The next row of Table 3.6 attributes the overall proportion of night time workers that could be attributed to each of the sub-categories of the night time category and the rest of the economy. This sums to more than 100%, and 61% of night time workers might be attributed to the rest of the economy. The last row applies a hierarchy from Cultural and leisure activities across to the rest of the economy, so that the categories sum to 100%. The principal effect of this action is to reduce the proportion of night time workers attributed to the rest of the economy, while there is some relatively minor reduction in the proportion of night time workers attributed to the sub-categories of the night time category.

Table 3.6: Allocation of London night time workers by sub-categories of the night time category, and rest of the economy

	Cultural and leisure activities	Activities which support night-time cultural and leisure activities	24-hour health and personal social services	Activities which support wider social and economic activities	Rest of economy
Industry definition	15%	9%	13%	11%	52%
Occupation definition	16%	20%	9%	14%	41%
Industry and occupation definition	11%	7%	7%	3%	33%
Overall proportion of night-time workers	21%	22%	15%	22%	61%
Proportion within hierarchy of night-time workers	21%	20%	11%	15%	33%

Source: Labour Force Survey, April-June 2017

Because of the overlaps for sub-categories of night time workers the remaining analysis of this chapter on this basis employs this hierarchy. Namely, night time workers in the Cultural and leisure activity category are classified to this sub-category, and then, in order, night time workers in Activities which support night time cultural and leisure activities, 24-hour health and personal social services, and finally activities which support wider social and economic activities.

Employing this hierarchy Table 3.7 provides basic information on numbers of night time workers by sub-category for time of work for London, and the rest of the UK. Of the 616,000 workers at night in London 79% come within the night time category, while 44% of workers who are in industries or occupations which fall into the night time category are not night time workers, as they work at other times of the day. 50% of workers in Cultural and leisure activities are night time workers while the corresponding figure for the rest of the economy not in the night time category is 21%. Workers in the night time category are 51% of all workers, while 31% of all workers are night time workers – as there are night time workers across all industries and occupations, and industries and occupations run 24 hours a day it is inevitable that a night time category will not include all night time workers, and will include some workers who are not night time workers. There is a similar broad picture for the rest of the UK.

Table 3.7: Night time workers by sub-category and time of work for London and the rest of the UK, 2017

	Cultural and leisure activities	Activities which support night-time cultural and leisure activities	24-hour health and personal social services	Activities which support wider social and economic activities	Rest of economy	Total	% Night-time category
London							
workers at night	147,000	162,000	106,000	71,000	131,000	616,000	79%
workers in the evening	322,000	307,000	173,000	228,000	518,000	1,549,000	67%
workers at night or in the evening	338,000	332,000	186,000	238,000	530,000	1,622,000	67%
workers at other times of day	342,000	435,000	305,000	535,000	2,052,000	3,669,000	44%
all workers	680,000	767,000	490,000	774,000	2,582,000	5,292,000	51%
% workers at night or in the evening	50%	43%	38%	31%	21%	31%	
Rest of the UK							
workers at night	547,000	654,000	832,000	600,000	559,000	3,193,000	82%
workers in the evening	1,461,000	1,451,000	1,245,000	1,351,000	1,722,000	7,231,000	76%
workers at night or in the evening	1,526,000	1,575,000	1,407,000	1,504,000	1,818,000	7,830,000	77%
workers at other times of day	1,586,000	2,596,000	2,081,000	2,970,000	9,688,000	18,921,000	49%
all workers	3,112,000	4,171,000	3,488,000	4,474,000	11,506,000	26,751,000	57%
% workers at night or in the evening	49%	38%	40%	34%	16%	29%	

Source: Labour Force Survey, April-June 2017

Cultural and leisure activities, of these sub-categories, both has the largest number of night time workers at 168,000, and the highest proportion of workers who are night time workers at 50%.

The analysis in the next section considers the earnings of employees in night time industries and occupations using the ONS Annual Survey of Hours and Earnings (ASHE), which has precise earnings information as it comes from employer payrolls²⁴.

²⁴ As note earlier, the ONS LFS is the source for most of the analysis in this Chapter, but the earnings information is less robust as it relies on individual recollection.

3.6 Earnings and working patterns in night time industries and occupations, and of night time workers

This section provides evidence on the working conditions of night time workers. It has labour market evidence on hourly earnings and working patterns, and brings this together with evidence on the health and wellbeing effects of forms of working patterns and night time working.

3.6.1 Earnings in night time industries and occupations

The London Living Wage (LLW) is a measure of low earnings above the statutory minimum wage, and is a measure of low earnings often used by the GLA in analysis²⁵. It is set to provide earnings to meet basic living costs²⁶. The latest available data is for April 2017 when the LLW for employees aged 18 or over was £9.75 an hour²⁷.

There are as many employee jobs in night time industries in 2017 earning below the LLW, 400,000, as there across all other industries, 406,000. This was also the case in 2011 when the comparable figure was 271,000. Jobs in Cultural and leisure industries at an aggregate level, and by gender and working hours, that is full-time or part-time, account for over half of jobs earning below the LLW across night time industries both in 2011 and 2017, Table 3.8.

There are more female employee jobs in night time industries than male, 210,000 compared to 190,000 in 2017, while it is more likely that male employee jobs earning below the LLW are in a night time industry (190,000 jobs) than any other industry (168,000 jobs). This is not the case for female employee jobs.

Table 3.8: Employee jobs in London’s night time industries paid less than the London Living Wage, by gender and working hours, 2011 and 2017

	Cultural and leisure industries	Activities which support night time cultural and leisure industries	24-hour health and personal social services	Activities which support wider social and economic industries	Any Night Time Economy industry	All other industries
2017						
all employee jobs	212,000	75,000	62,000	50,000	400,000	406,000
all part-time employee jobs	120,000	25,000	36,000	30,000	211,000	195,000
male employee jobs	117,000	36,000	13,000	24,000	190,000	168,000
male part-time employee jobs	45,000	21,000	4,000	7,000	77,000	65,000
female employee jobs	95,000	39,000	49,000	26,000	210,000	238,000
female part-time employee jobs	47,000	29,000	22,000	13,000	112,000	146,000
2011						
all employee jobs	149,000	63,000	29,000	30,000	271,000	271,000
all part-time employee jobs	75,000	20,000	14,000	19,000	128,000	118,000
male employee jobs	83,000	29,000	6,000	18,000	135,000	116,000
male part-time employee jobs	34,000	18,000	x	5,000	60,000	51,000
female employee jobs	66,000	34,000	23,000	12,000	135,000	156,000
female part-time employee jobs	40,000	26,000	12,000	5,000	83,000	102,000

Source: Annual Survey of Hours and Earnings, April 2011 and April 2017

Note: x indicates that sample size was too small to produce a robust figure

There is nearly double the employee jobs in night time occupations in 2017 earning below the LLW, 531,000, as there across all other occupations, 275,000. It was more than double in 2011 when the figures were 378,000 and 164,000 respectively. Employee jobs in occupations in Activities which support night time cultural and leisure activities are the largest category

²⁵ This is different from the National Living Wage which is a minimum wage, and is set at a higher rate

²⁶ For the calculation see [The Calculation | Living Wage Foundation](#)

²⁷ The ONS data for the analysis in this section can be found at [The Night Time Economy in London and Manchester, 2001 to 2017 - Office for National Statistics](#)

(198,000 jobs), and when combined with the next largest Cultural and leisure activities (185,000 jobs) account for over 70% of jobs below the LLW in night time occupations in 2017, Table 3.9.

There are more female employee jobs in night time industries than male, 277,000 compared to 253,000 in 2017, and it is the case for both male and female employee jobs earning below the LLW that there are more in night time occupations than other occupations.

Table 3.9: Employee jobs in London’s night time occupations paid less than the London Living Wage, by gender and working hours, 2011 and 2017

	Cultural and leisure activities	Activities which support night time cultural and leisure activities	24-hour health and personal social services	Activities which support wider social and economic activities	Any Night Time Economy activity	All other activities
2017						
all employee jobs	185,000	198,000	64,000	84,000	531,000	275,000
all part-time employee jobs	100,000	77,000	35,000	52,000	263,000	142,000
male employee jobs	102,000	94,000	13,000	45,000	253,000	105,000
male part-time employee jobs	37,000	50,000	6,000	13,000	106,000	37,000
female employee jobs	83,000	104,000	51,000	39,000	277,000	170,000
female part-time employee jobs	49,000	71,000	23,000	19,000	162,000	96,000
2011						
all employee jobs	130,000	160,000	30,000	59,000	378,000	164,000
all part-time employee jobs	61,000	57,000	15,000	37,000	170,000	76,000
male employee jobs	74,000	71,000	6,000	34,000	185,000	66,000
male part-time employee jobs	29,000	39,000	4,000	11,000	83,000	28,000
female employee jobs	56,000	89,000	24,000	25,000	193,000	98,000
female part-time employee jobs	40,000	63,000	12,000	10,000	125,000	60,000

Source: Annual Survey of Hours and Earnings, April 2011 and April 2017

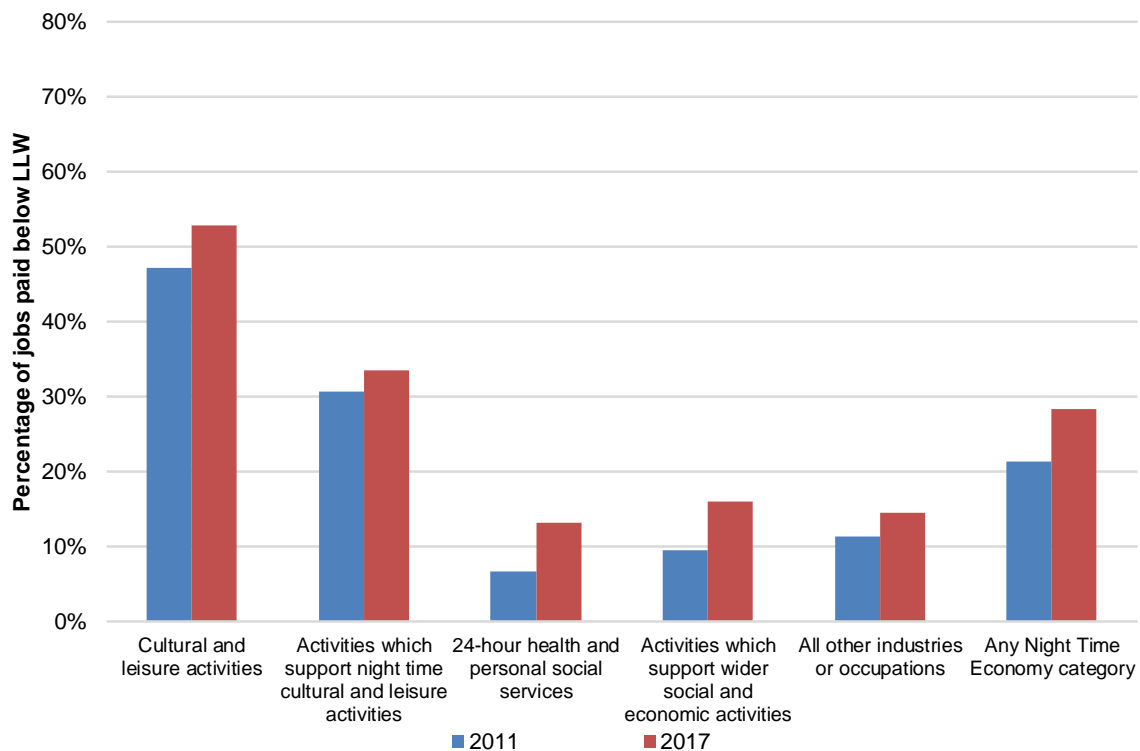
In April 2017, 28.4% of employee jobs in the night time industries had hourly earnings below the LLW of £9.75 per hour – a far higher share of low-paid employees than the average for all sectors of the London economy (19.2%), and industries outside the night time industries (14.8%).²⁸

Employees in Cultural and leisure industries are by far the most likely to be affected by low pay. With 52.8% or 212,000 employee jobs paid below £9.75 per hour in April 2017, they account for over half of low-paid jobs in the night time industries. The next highest rate of low pay was in Activities which support night time cultural and leisure activities (33.5%). On the other hand, both Activities which support wider social and economic activities (16.0%) and 24-hour health and personal social services (13.2%) had relatively low rates of low pay in 2017 compared to the London average.

In comparison in 2011 21.3% of employee jobs in the night time industries had hourly earnings below the LLW. Figure 3.13 shows the rate of employee jobs paid less than the LLW increased across each night time industry sub-group between 2011 and 2017. Activities which support night time cultural and leisure activities was the only subgroup where the change in the share of low-paid employees did not exceed the London average for all sectors.

²⁸ Office of National Statistics, [The Night Time Economy in London and Manchester, 2001 to 2017](#), March 2018

Figure 3.13: Percentage of employee jobs in London’s night time industries paid less than the London Living Wage, 2011 and 2017



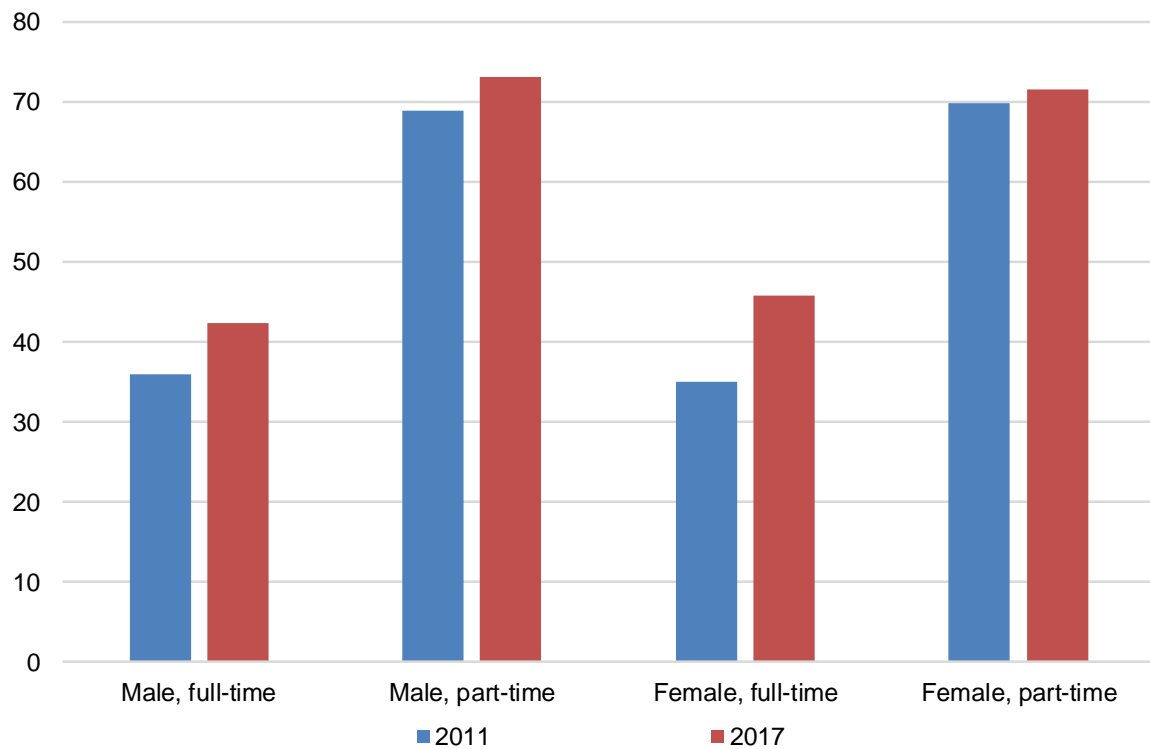
Source: Annual Survey of Hours and Earnings, April 2011 and April 2017

The likelihood of being paid below the LLW is higher for part-time employees than full-time employees across all industries:

- 72.3% in Cultural and leisure activities
- 72.8% in Activities which support night time cultural and leisure activities
- 24.6% in 24 hour health and personal social services activities
- 37.4% in Activities which support wider social and economic activities
- 52.9% across night time activities
- 40.3% for all other activities

The likelihood of low pay tends to be higher for women as well as part-time work. Pay in Cultural and leisure industries provides an example. Part-time employees (72%) are more likely to be low paid than full-time employees (44%) and female employees (56%) are more likely to be paid below the LLW than male employees (51%), Figure 3.14.

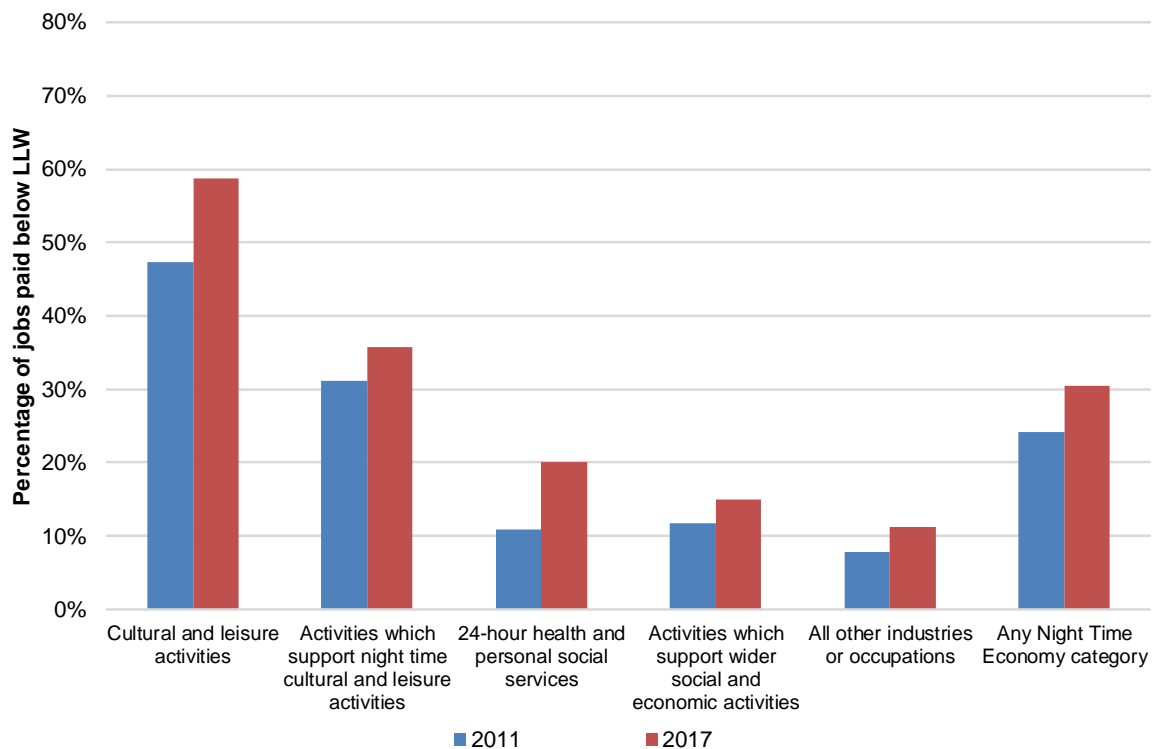
Figure 3.14: Percentage of employee jobs in London's Cultural and leisure industries paid less than the London Living Wage, by gender and working pattern, 2011 and 2017



Source: Annual Survey of Hours and Earnings, April 2011 and April 2017

Figure 3.15 presents the information of Figure 3.13, but for London night time occupations rather than industries. Again, the definition targets well the low paid, as the proportions of employees in other occupations and on low pay is relatively low. Once again it is employees in Cultural and leisure activities, or Activities which support night time cultural and leisure activities who at highest risk of low pay.

Figure 3.15: Percentage of employee jobs in London's night time occupations paid less than the London Living Wage, 2011 and 2017



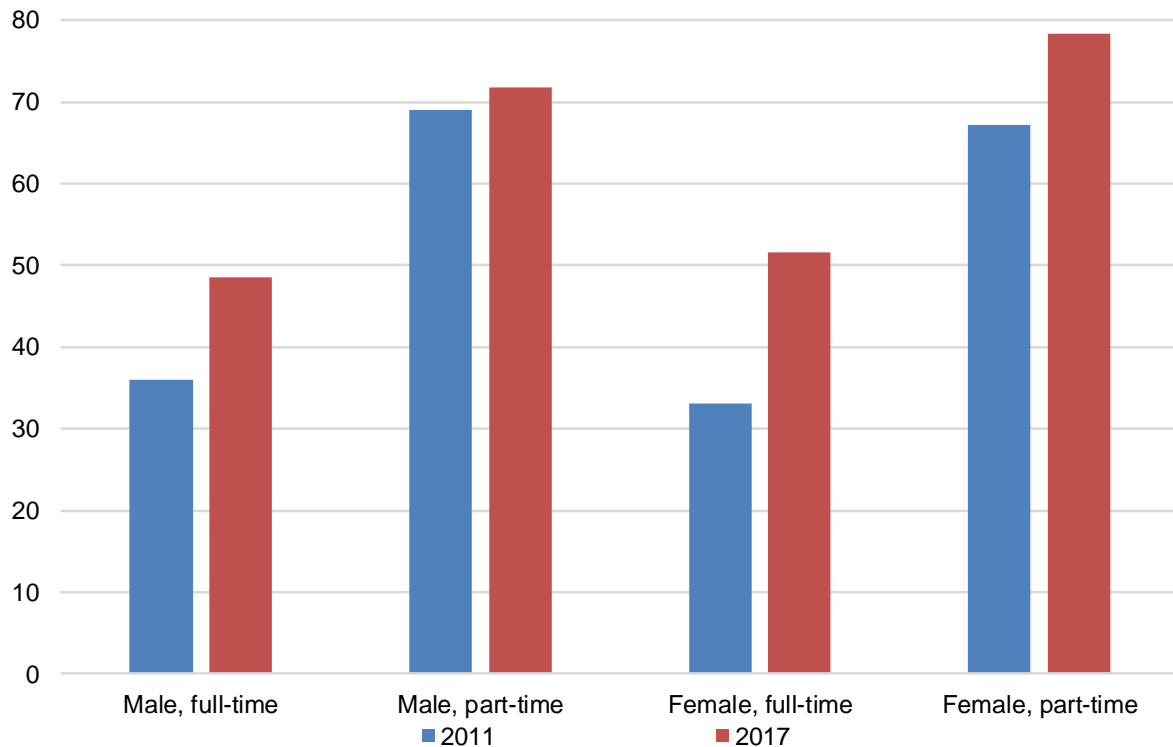
Source: Annual Survey of Hours and Earnings, April 2011 and April 2017

The likelihood of being paid below the LLW is higher for part-time employees than full-time employees across all occupations:

- 75.4% in Cultural and leisure activities
- 68.5% in Activities which support night time cultural and leisure activities
- 27.3% in 24 hour health and personal social services activities
- 25.2% in Activities which support wider social and economic activities
- 51.1% across night time activities
- 37.0% for all other activities

Figure 3.16 presents the information of Figure 3.14 but for Cultural and leisure activities as defined by occupations rather than industries. Again, the likelihood of being on low pay is higher for women, and part-time workers.

Figure 3.16: Percentage of employee jobs in London’s Cultural and leisure occupations paid less than the London Living Wage, by gender and working pattern, 2011 and 2017



Source: Annual Survey of Hours and Earnings, April 2011 and April 2017

The proportion of part-time employee jobs earning below the LLW is also very high for occupations in Activities which support night time cultural and leisure activities. In 2017, it was 68.5% for all employee jobs, 67.7% for male employee jobs, and 69.1% for female employee jobs.

3.6.2 Shift working

Shift working²⁹ is far more common amongst individuals who usually work during the evening or at night, than those who do not, and is less common in London than the rest of the UK. In London, only 41% of workers at night never work shifts rising to 63% for all night time workers. This is less than the 93% of workers at other times of the day who never work shifts, Table 3.10. While for the rest of the UK the proportion of night time workers is lower at 53%, although it is still 93% of workers at other times of the day never work shifts.

²⁹ Using LFS variable SHFTWK99

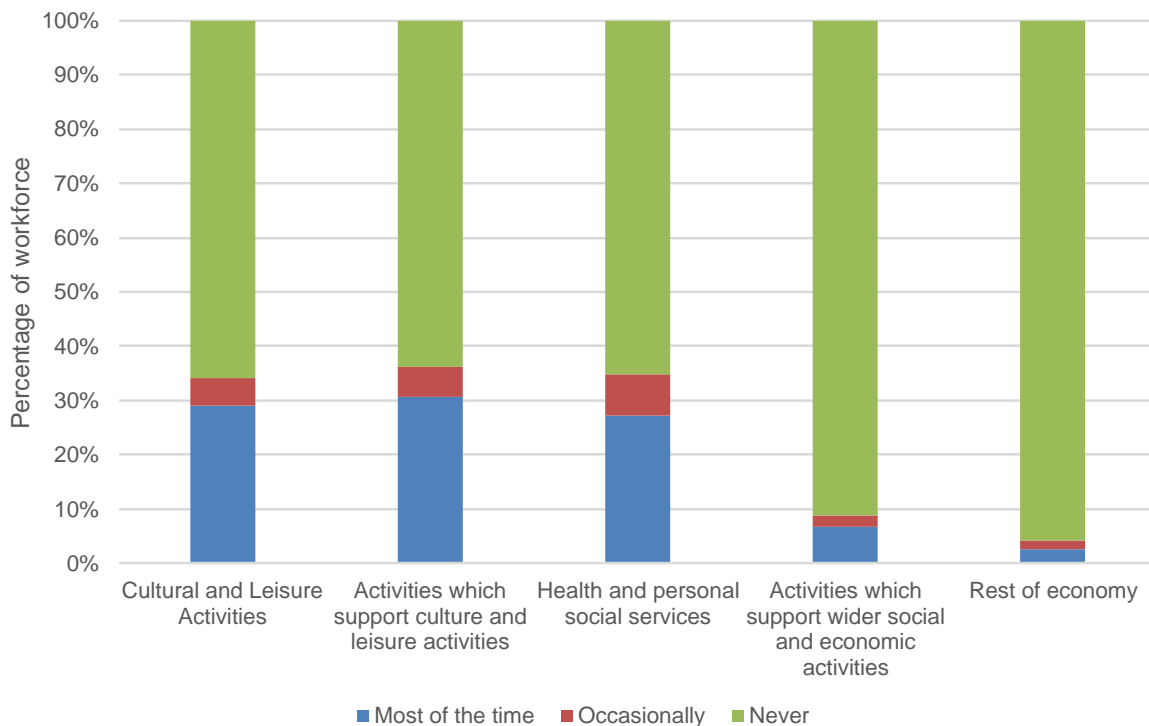
Table 3.10: Prevalence of shift working in London and the rest of the UK by pattern of working hours, 2017

	Most of the time	Occasionally	Never
London			
workers at night	55%	4%	41%
workers in the evening	31%	5%	64%
workers at night or in the evening	33%	5%	63%
workers at other times of day	4%	3%	93%
Rest of the UK			
workers at night	63%	6%	32%
workers in the evening	39%	7%	55%
workers at night or in the evening	41%	7%	53%
workers at other times of day	5%	3%	93%

Source: Labour Force Survey, April-June 2017

Shift working is more common across the night time sub-categories than it is for the rest of the economy. Around 30% of night time workers in Cultural and leisure activities, Activities which support night time cultural and leisure activities, and 24-hour health and personal social services work shifts most of the time, Figure 3.17. In contrast, 7% of night time workers in Activities which support wider social and economic activities work shifts most of the time, which is similar to the figure for the rest of the economy of 2%.

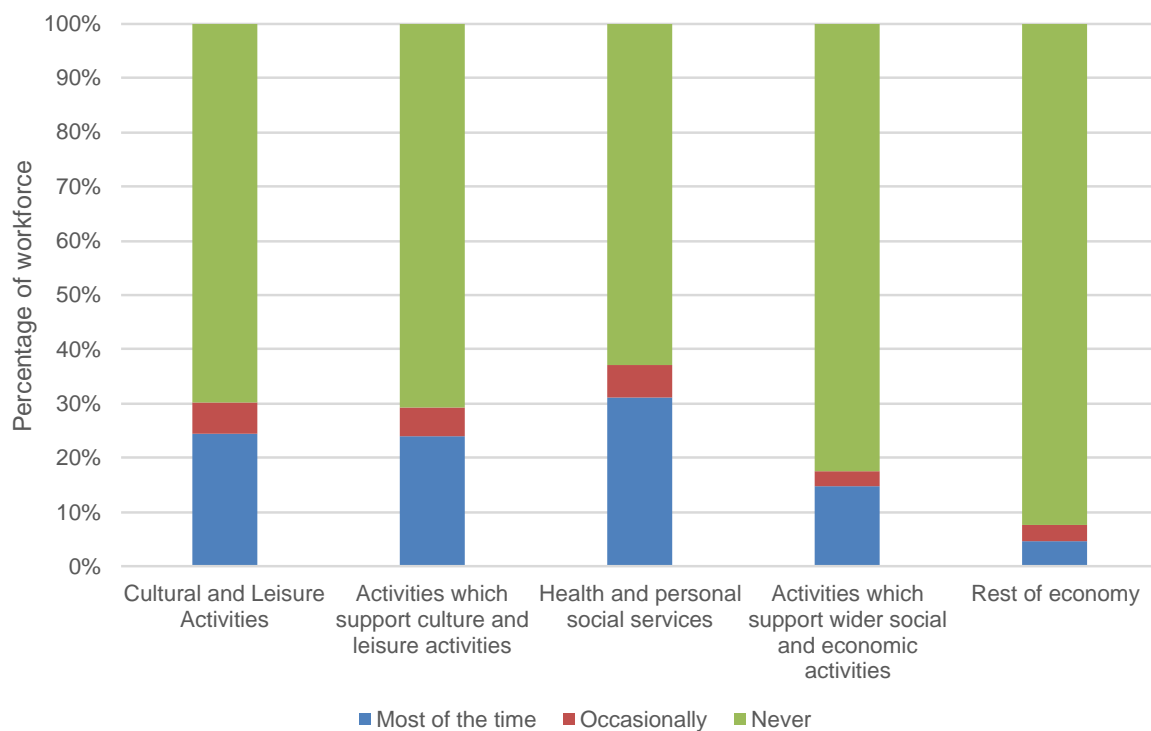
Figure 3.17: Prevalence of shift working amongst night time workers in London by night time sub-categories and for the rest of the economy, 2017



Source: Labour Force Survey, April-June 2017

There is a similar broad picture for the rest of the UK in that shift working amongst night time workers is concentrated on Cultural and leisure activities, Activities which support night time cultural and leisure activities, and 24-hour health and personal social services, Figure 3.18. If anything, it is slightly less common in these sub-categories than in London (although because of the margin of error around survey estimates due to sample sizes it is not possible to be definitive). Shift working is more common, though, in the rest of the UK in Activities which support wider social and economic activities where 15% of night time workers work shifts most of the time.

Figure 3.18: Prevalence of shift working amongst night time workers in the UK outside London by night time sub-categories and for the rest of the economy, 2017



Source: Labour Force Survey, April-June 2017

3.6.3 Part time working and second jobs

It is relatively less common for workers to work part-time³⁰ in London than the rest of the UK, and the rates of part-time working are similar for both geographies for night time workers and workers at other time of the day. In London, 19% of night time workers work part-time (and 14% of workers at night work part-time) compared to 28% in the rest of the UK, Table 3.11.

It is relatively uncommon for workers to have a second job³¹. For example, 5% of night time workers in London have more than one job.

³⁰ Using LFS variable FTPTWK

³¹ Using LFS variable SECJOB

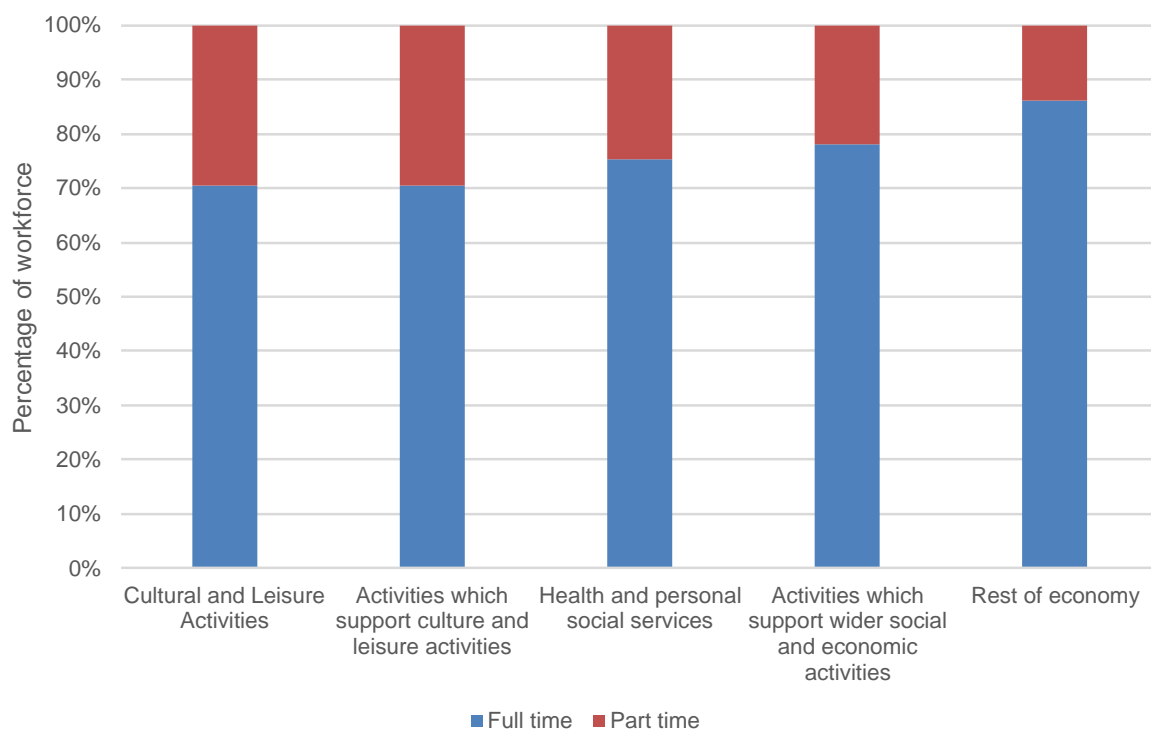
Table 3.11: Prevalence of part-time working and second jobs in London and the rest of the UK by pattern of working hours, 2017

	Part-time	Second job
London		
workers at night	14%	4%
workers in the evening	19%	5%
workers at night or in the evening	19%	5%
workers at other times of day	22%	3%
Rest of the UK		
workers at night	30%	4%
workers in the evening	28%	5%
workers at night or in the evening	28%	5%
workers at other times of day	29%	4%

Source: Labour Force Survey, April-June 2017

Part-time working in London is concentrated in the night time category, and particularly Cultural and leisure activities, and Activities which support night time cultural and leisure activities, where 30% of workers work part-time, Figure 3.19.

Figure 3.19: Prevalence of part-time working amongst night time workers in London by night time sub-categories and for the rest of the economy, 2017

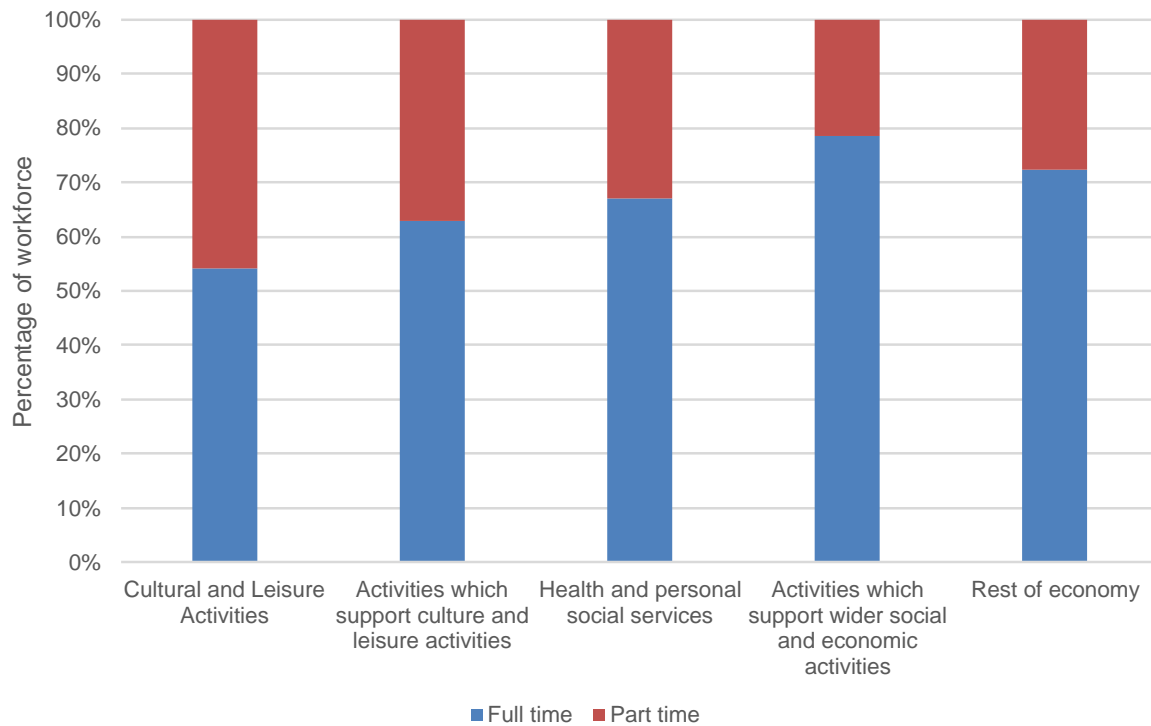


Source: Labour Force Survey, April-June 2017

There are some differences in part-time working patterns in the rest of the UK. Across the categories part-time working is more common than London, except for Activities which support the wider economic and social activities. Indeed, for the rest of the UK part-time working in the

rest of the economy is more prevalent than this sub-category, Figure 3.20. As in London part-time working is more prevalent for Cultural and leisure activities, Activities which support night time cultural and leisure activities, and 24-hour health and personal social services.

Figure 3.20: Prevalence of part-time working amongst night time workers in the rest of the UK outside London by night time sub-categories and for the rest of the economy, 2017



Source: Labour Force Survey, April-June 2017

3.6.4 Contractual and non-contractual terms of employment

Terms of employment may also provide some insight into working conditions. Table 3.12 considers the prevalence of the distribution of workers between employees and the self-employed³², and within employees those with permanent contracts³³. There is little difference by working hours for London and the rest of the UK. Broadly, for night time workers and workers with other working hours, 80% are employees and 20% are self-employed, and 75% of workers are employees with permanent contracts.

³² Using LFS variable STATR

³³ Using LFS variable JOBTYP

Table 3.12: Prevalence of contractual and non-contractual forms of employment in London and the rest of the UK by pattern of working hours, 2017

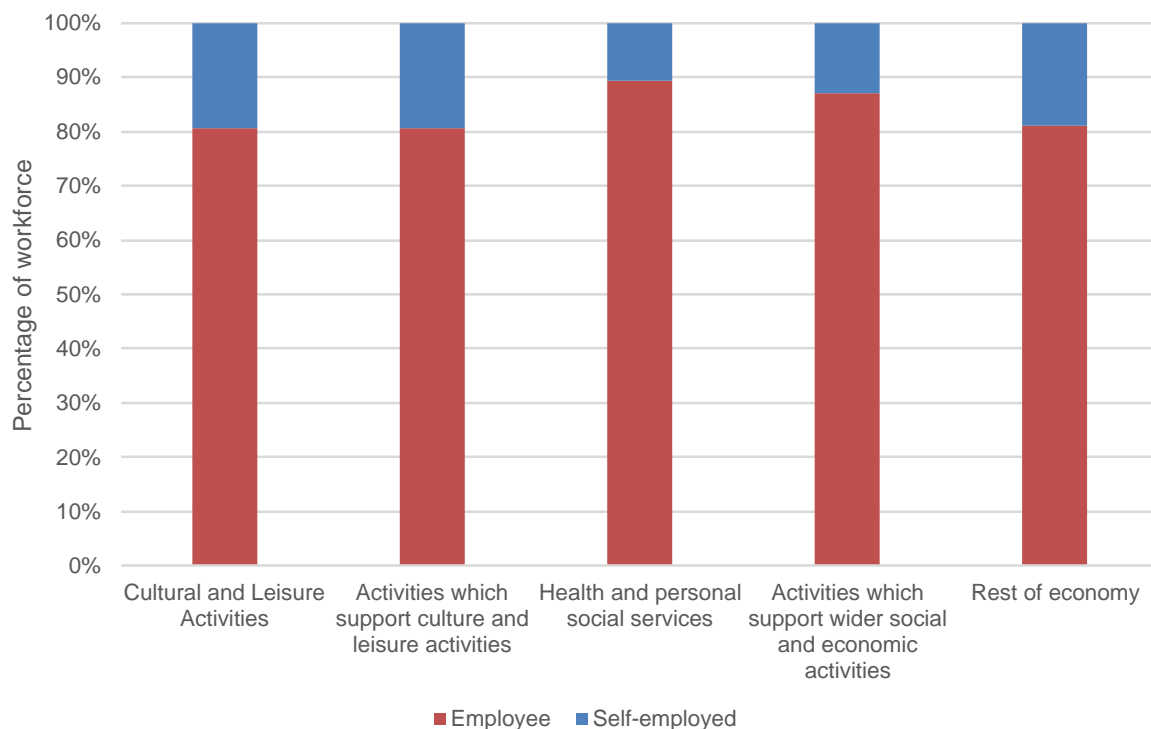
	Permanent contract	Other employee	Self-employed
London			
workers at night	75%	5%	20%
workers in the evening	73%	5%	22%
workers at night or in the evening	73%	5%	21%
workers at other times of day	79%	5%	16%
Rest of the UK			
workers at night	81%	6%	13%
workers in the evening	74%	6%	20%
workers at night or in the evening	75%	6%	19%
workers at other times of day	81%	5%	13%

Source: Labour Force Survey, April-June 2017

Note: Analysis excludes workers on a government scheme, and unpaid family workers who are 0.5% or less of all workers

In London 80% of night time workers in Cultural and leisure activities, Activities which support culture and leisure activities, and the rest of the economy are employees, Figure 3.21. The proportion of employees is over 85% in 24-hour health and personal social services, and Activities which support wider social and economic activities.

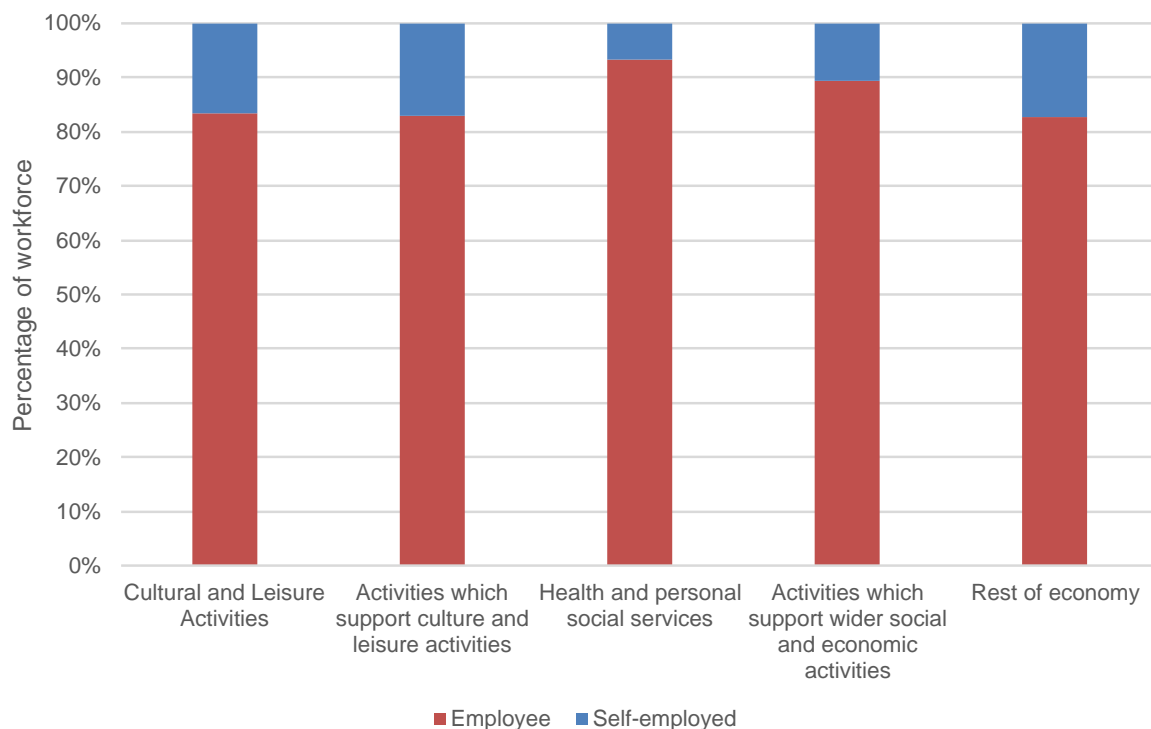
Figure 3.21: Employee and self-employment split amongst night time workers in London by night time sub-categories and for the rest of the economy, 2017



Source: Labour Force Survey, April-June 2017

Again, for the rest of the UK the proportion of night time workers who are employees is around 80% for Cultural and leisure activities, Activities which support culture and leisure activities and the rest of the economy. Around 90% of night time workers in 24-hour health and personal social services, and Activities which support the wider social and economic activities are employees, Figure 3.22.

Figure 3.22: Employee and self-employment split amongst night time workers in the rest of the UK outside London by night time sub-categories and for the rest of the economy, 2017



Source: Labour Force Survey, April-June 2017

3.6.5 Effects of night time working

Shift working is more prevalent in night time workers than the wider population of workers. Cultural and leisure activities, and Activities which support night time cultural and leisure activities are both industries categorised by shift-working, part-time work, and low pay. Shift working is also common in 24-hour health and personal social services.

There is an evidence base which suggests that shift-working can have adverse effects on individual wellbeing³⁴:

- Those who had never done shift work have the least disturbed sleep patterns
- Participants who were working on shifts reported more chronic fatigue
- Shift workers or former shift workers are more likely than workers who have never worked shifts to show symptoms of a range of physical health problems such as obesity, cardiovascular disease, peptic ulcers, gastro-intestinal problems and failure to control blood sugar levels

³⁴ See [The effects of shift work on health \(2015\)](#) and

There is also evidence that shift work, and in particular night time working, can cause disruption of family and social activities where the daily rhythms of people are oriented around the day³⁵. Childcare, housework, shopping, and leaving a partner alone at night can all lead to marital strain and family dysfunction. At the same time, employee influence over work schedule can be associated with better work/life balance – for example, for some couples it helps if one partner works night because it can help with the childcare. And higher rewards can reduce the detrimental effects of shift working.

³⁵ This is also a finding of the focus groups accompanying this research, see [London Datastore](#)

4 London's residents and visitors

4.1 Introduction

This chapter brings together the evidence on who else, other than night time workers, is in London at night, where they are staying, what they are doing, the barriers they face to going out, and opportunities for night time development. There is evidence on trends, and changes in characteristics and preferences. The sections are:

- Characteristics of London residents
- Income and expenditure of London residents
- What London residents do at night
- Barriers to going out at night for Londoners, and opportunities
- Numbers and experience of London overnight visitors

Much of the information in this chapter is at an aggregate level. There are some significant limitations with existing data on what can be said at a more granular level on what people do at night and where. Cities across the world have similar issues, and the final section considers ways to develop the evidence base, and what other cities are doing.

4.2 Main findings

The demand for night time activities in London is likely to increase over the next 20 years, reflecting an increase in the resident population and more overnight visitors

- London's population is expected to reach 10.8 million by 2041 up from 8.8 million in 2017
- Demand for London serviced visitor accommodation is projected to reach 196.4 million nights by 2041 from 138.5 million visitor nights in 2015

Londoners are more likely to stay up late than the rest of the UK population. 54% of Londoners say they usually go to bed after 11pm (the UK figure is 48%), and 24% regularly go to bed after midnight (the UK figure is 19%).

London's population and habits are changing, which is influencing trends for a more diverse night time offer

- There has been a major shift towards buying alcohol for home consumption
 - Sales in England and Wales of alcohol (as measured by units of pure alcohol) per adult have remained almost unchanged between 1994 and 2017
 - The on-trade, such as pubs and restaurants, accounted for 58% of sales of units of pure alcohol in 1994, and 30% in 2017, with remaining sales being by the off-trade, such as supermarkets and off-licenses.
- There has been a long-term trend in England towards less frequent drinking, particularly amongst young people, and ethnic minorities
 - Amongst all adults in England teetotalism (as estimated by maximum alcohol use of zero on any day in the last week) has risen from around 33% in 1998 to around 42% in 2016
 - For 16-24 year olds the increase has been from around 35% to around 54%
 - 51% of ethnic minorities, and 16% of white people, in Britain in 2017 are teetotallers (as estimated by adults who did not drink alcohol in the previous week)³⁶

³⁶ The wording of questions, while similar, can influence responses

- 27% of Londoners, and 20% of people in Britain, in 2017 are teetotallers
- And London has a comparatively young and ethnically diverse population
 - For ages 18 to mid-twenties there are around 8,000 migrants a year to London from other parts of the UK
 - 43% of Londoners, and 80% of the UK population, are white British
- Young people and ethnic minorities are most likely amongst Londoners to say that too many places revolve around alcohol
 - 20% of 18-24 year olds, 14% of 25-49 year olds, 10% of 50-64 year olds, and 10% of 65+, think that too many places revolve around alcohol
 - 17% of black and minority ethnic (BAME) Londoners, and 10% of white Londoners, think that too many places revolve around alcohol
- 19% of BAME Londoners, and 26% of white Londoners socialise in a pub or bar
- Ethnic minorities would like to see more low/no alcohol options
- The national expansion in highly qualified people has been faster in London, is associated with the higher earnings of Londoners, and may make more expensive night time activities more affordable
 - 52% of Londoners, and 32% of the UK population, have higher education qualifications

Londoners are less likely to value cultural experiences at night than visitors, and more likely to engage in other activities at night

- 65% of Londoners go out at night at least once a week, doing at least one of three options:
 - 42% regularly do personal errands
 - Such as go to the shops or the doctor
 - 42% engage in social and wellbeing activities
 - 22% socialise in a pub, bar, café, or some other public space
 - 19% a gym, exercise classes, or a sport
 - 10% attend cultural activities, such as music, art, or theatre
 - 10% attend community, religious, or voluntary groups
 - 31% work, study, or provide care at night³⁷
 - 23% go to work
 - 8% attend a class or study group
 - 8% go out to care for others such as children or older people

Although how Londoners experience the city at night is quite different across groups

- Younger people, residents of inner London, men, BAME Londoners, non-disabled people, and people of higher social grade (ABC1), are more likely to do most of a range of night time activities
 - 44% of 18-24 year olds, 45% of 25-49 year olds, 38% of 50-64 year olds, and 33% of 65+ do everyday tasks such as shopping or personal errands
 - 49% of residents of inner London, and 38% of residents of outer London do everyday tasks such as shopping or personal errands
 - 28% of men, and 16% of women socialise in a bar
 - 22% of BAME Londoners, and 14% of white Londoners, socialised somewhere other than a pub or bar

³⁷ These are Londoners' self-reported activities. The percentage who work at night is of all Londoners, and not people who work in London, as reported in Chapter 3.

- 25% of non-disabled Londoners, and 17% of disabled Londoners, socialised in a pub or bar
- 47% of ABC1s, and 35% of C2DEs do everyday tasks such as shopping or personal errands
- Barriers to going out vary across groups
 - Younger, BAME, and higher social grade Londoners are more likely to regard not having enough time as an important barrier to going out
 - Younger and higher social grade Londoners are more likely to consider that it takes too long to travel around as an important barrier to going out
 - Older, disabled, and lower social grade Londoners, and women, are more likely to regard not having an interest in going out at night as a barrier
 - Older Londoners also regard too few things on offer as an important barrier to going out
 - Women, disabled and lower social grade Londoners, also regard a lack of safety as an important barrier to going out

There is no systematic evidence at a granular level on how well different groups feel able to contribute to London's nightlife, and participate in it. There are stories of sufficient credibility that they have been picked up by the mainstream media that concerts by ethnic minority artists appear to have been cancelled without due justification, and that ethnic minorities have not been allowed entry to certain night clubs because of the colour of their skin.

The biggest barrier to going out at night is cost, and this is a view shared across groups

- 36% of Londoners say that it is too expensive to go out at night, while 27% are not particularly interested in going out at night, 19% don't have enough free time, and 19% do not feel safe in London at night
- Those who say it is too expensive to go out at night include:
 - 50% of 18-24 year olds, 38% of 25-49 year olds, 31% of 50-64 year olds, and 27% of 65+
 - 36% of residents of inner London, and 36% of residents of outer London
 - 35% of women, and 37% of men³⁸
 - 34% of BAME, and 36% of white Londoners
 - 39% of disabled and 35% of non-disabled Londoners
 - 37% of ABC1s, and 36% of C2DEs

London is an expensive city, with a significant proportion of low income households, slow earnings growth, and where many households face significant housing or childcare costs, which will limit the money available for going out

- 22% of households receive gross income of less than £350 a week, and half receive less than £700
- Median gross earnings in London, after inflation, in 2017 are below the level in 2002
- Median average housing costs were 21% of median average net household incomes in London, and 10% for the UK for 2014-16

³⁸ Chart at Figure 8.8

London is also a city with a very wide income distribution. The income of the highest income households, after tax and housing costs, compares favourably with the rest of the UK, perhaps because Londoners have more earning power and are relatively highly qualified. At the same time the income of the lowest income households in London compares unfavourably with the rest of the UK:

- The income distribution, after tax and housing costs, is wider in London than the rest of the UK
 - Income in the top decile in London is 9.6 times the bottom decile
 - Income in the top decile in the rest of the UK is 5.1 times the bottom decile
- Income in the bottom decile of the household income distribution after tax and housing costs is lower in London than the UK
 - It is £111 per week in London, and £169 per week in the rest of the UK
- It is only at the median point of the income distribution that weekly income in London and the rest of the UK is the same at £416 per week

The cost of some night time activities has been rising faster than inflation

- General inflation³⁹ rose by 27% between 2006 and 2017 across the UK
- The cost of visiting a restaurant or cafe rose by 40%
- The cost of attending cultural services rose by 43%

Although there are opportunities. GLA focus group participants said they liked the way that London at night has developed in recent years. The offer is seen to cater to all types of people

Relative to its large population there are fewer cultural facilities in London than many other European cities

Four out of five visitors to London say culture and heritage is the main reason for their visit to London. This is concentrated in Westminster and the West End. It is where visitors go, and they are satisfied with London's nightlife

- Westminster accounts for 19% of employee jobs, and 13% of workplaces, in Cultural and leisure activities in London⁴⁰
- Night time economy floorspace in the West End is near four times higher than that for the town centre with the next highest such floorspace, Shepherd's Bush⁴¹
- Night time visitor activity is heavily concentrated in Central London, with East and particularly South London rarely visited by tourists:
 - 75% of visitors go to central areas (e.g. Soho, Oxford Street, and London Bridge)
 - While 25% go to West London (e.g. Shepherd's Bush, Ealing and Notting Hill)
 - 11% go to East London (e.g. Shoreditch, Dalston, and Hoxton)
 - And 9% go to South London (e.g. Clapham, Brixton and Peckham)
- Almost three quarters of visitors, 73%, were satisfied with London's nightlife.

³⁹ Consumer Price Index

⁴⁰ See Chapter 5

⁴¹ See Chapter 5

While London is perceived as a global leader for international overnight visitors, and is an important destination for domestic overnight visitors

- There were 32.0 million overnight visitors in 2017
 - 19.8 million international visitors
 - 12.1 million domestic visitors
- Overnight visitors spent £16.2 billion pounds in London in 2017, of which international visitors spent £13.5 billion, and domestic visitors spent £2.7 billion pounds
- It is the third most visited city in the world in terms of international arrivals, and a global leader in terms of the range and scale of the cultural offer
- International tourists tend to remain in central areas of London, the areas where most serviced accommodation is

Visitors have different habits when going out in London to Londoners:

- 73% go to restaurants
- 60% go sightseeing
- 46% drink at pubs
- 40% watch theatre shows
- 36% go shopping at night.

Visitors tend to find out what to do at night just by walking around (52%), or searching the internet (50%, although this rose to 64% amongst 18-34 year olds)

A very high percentage of London visitors considered that the capital offers good transport and varied nightlife, including a wide cultural offer, although fewer 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% agreed that London's nightlife is good value for money
- 45% agreed that it's easy to find free evening events in London

London is comparable in attractiveness for tourists to New York. Other cities that rate highly when compared with London include Hong Kong, Paris, Berlin and Sydney.

There are significant evidence gaps in understanding what people do, and want to do at night, and this is true both for London and other cities across the world. There are, though, various developments:

- 19 cities across the world have an independent body to represent night time industries; a Night Czar or Night Time Mayor; or night time offices within government
- Other initiatives to develop the evidence base
 - San Francisco has a Late Night Transportation Working Group, which has survey late night and early morning transportation to, from, and within San Francisco, and made 15 recommendations for improvements
 - Berlin has audited and mapped its music venues
 - London is developing a Cultural Infrastructure Map
- The only city with a clear and public long-term strategy for management of its night time economy is Sydney

Urban data, such as anonymised card payment data, provides opportunities for a more complete picture of London’s night time offer including:

- Patterns of consumption – there is incomplete information on the economic value of London’s economy at night
 - An estimate of night time output has not been produced for this report because a significant proportion of workers in the night time category are shift workers and work both during the day and night. It is not known what proportion of their work is at night
- Population mapping – a key part to understanding the pros and cons of different parts of London’s economy at night is gaps in population/footfall data for the city’s night time areas
- London’s night time demographic – the Mayor of London is committed to widening access to ensure all Londoners can participate in the city’s night time offer, but there are gaps in our understanding of who does and does not access different services at night
- Patterns of night time activity – there is limited data on travel patterns at night, where people go to at night, and changes over time

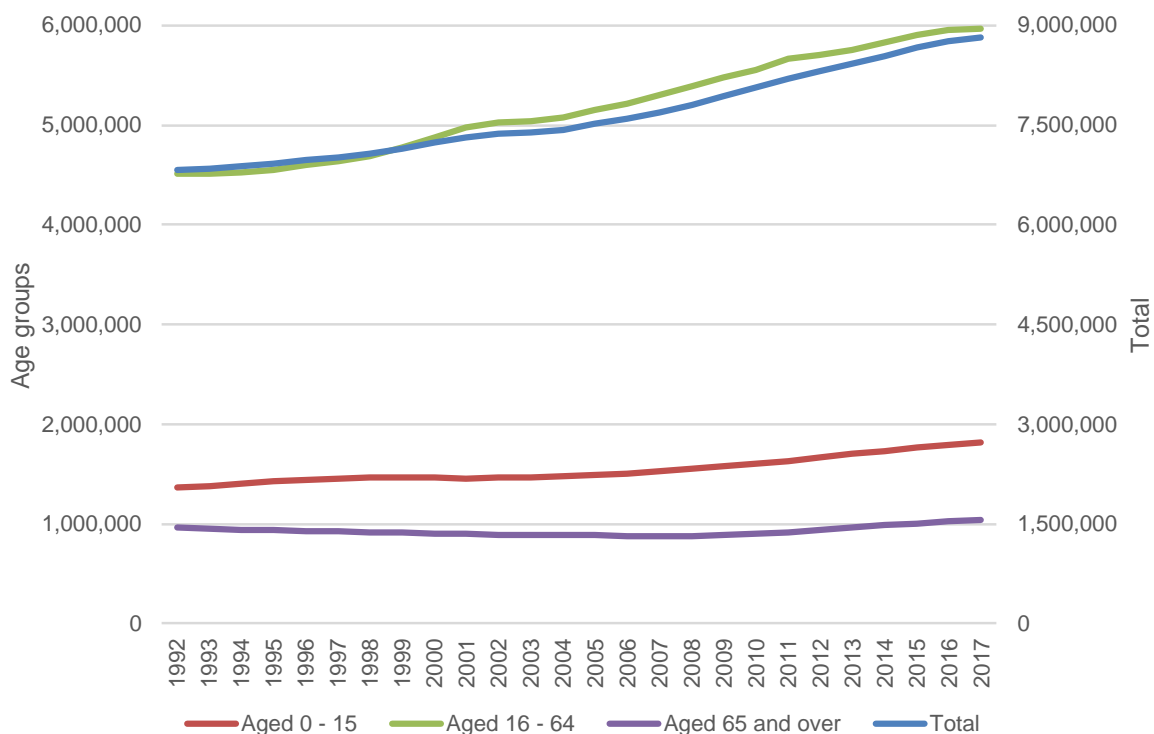
4.3 Characteristics of London residents

The composition of London’s population, what the parts are, do and want can provide insight into what is happening at an aggregate level, and how London is changing. This section provides evidence on those characteristics, which also informs interpretation of the development of London’s night time offer, and how it reflects the residents of the city.

4.3.1 Demography of London residents

The number of London residents has grown from 6.8 million in 1992 to 8.8 million in 2017. This is growth of about 80,000 people, or 1%, a year. The rate of growth has been slightly faster for the working age population, and children, while slower for pensioners, Figure 4.1.

Figure 4.1: Number of London residents 1992-2017, total and by age band

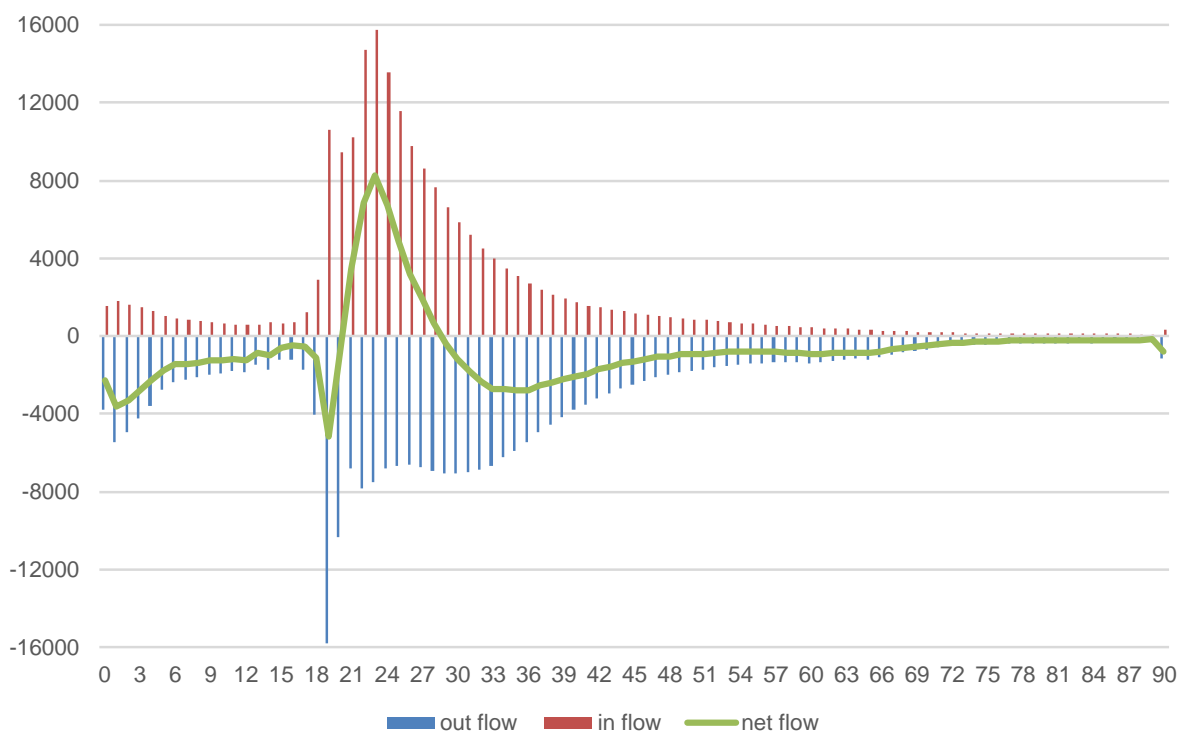


Source: ONS mid-year population estimates

London’s population is projected to increase to 10.8 million by 2041 up from 8.8 million in 2017⁴².

Migrants from abroad are an important part of London’s labour force, and domestic migration (which includes people born overseas) also has a significant bearing on the composition of the London population. Domestic migration in and out of London is most significant for people aged 18 and over, Figure 4.2. There is a net migration out of London for 18-21 year olds, a net migration into London for older adults up to 30, and a net out migration of older people. This series does not record the nationality of migrants, there may be some individuals who leave then return, and there will be others who move within London. To place the scale of the flows into context there are around 90,000 16 or 17 year olds in London at any given time. For ages 18 to mid-twenties there are around 8,000 migrants a year from other parts of the UK.

Figure 4.2: Domestic migration flows to and from London by age



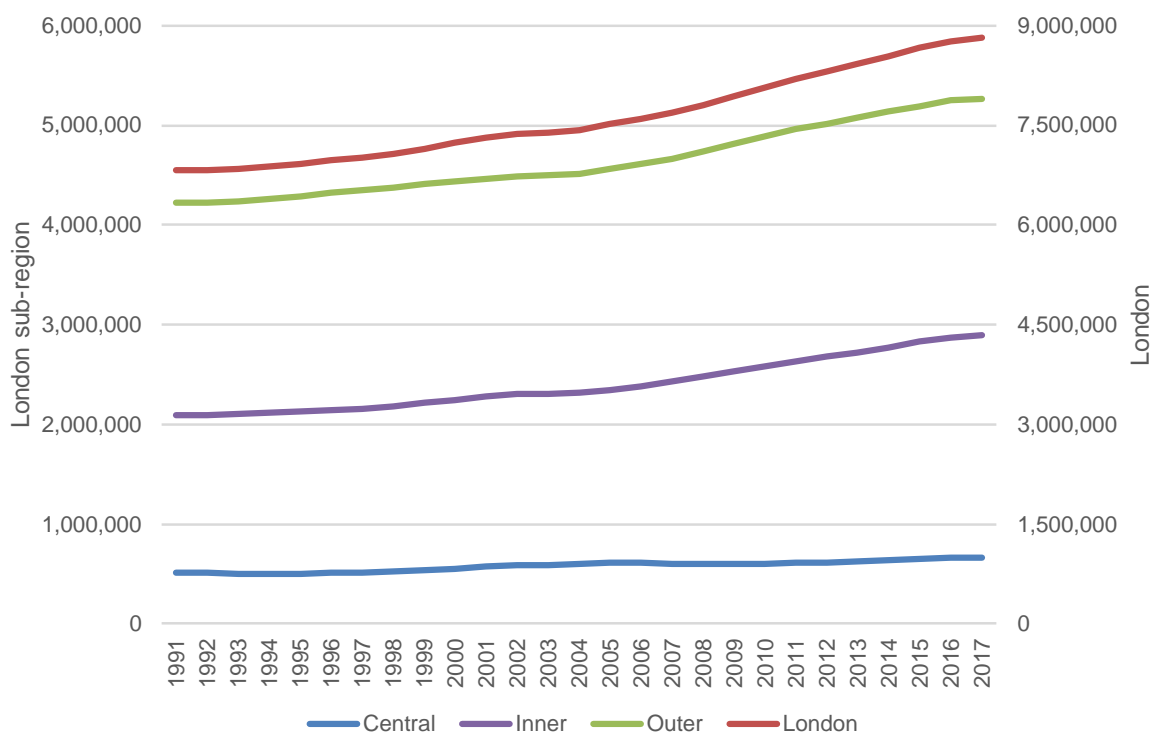
Source: ONS internal migration series, average of years 2007-16

London’s population has grown steadily and evenly across geographical areas. In 2017, of the 8.8m residents, 5.3m were in outer London, 2.9m in inner London, and 0.7m in central London⁴³. The population shares of each area has remained fairly constant over the period 1991-2017 with inner London rising from 31% to 33% of the total, and outer London falling from 62% to 60%, Figure 4.3.

⁴² See [Demography – London Datastore](#)

⁴³ This uses the administrative definition of areas of London. See Annex D for local authority coverage of each area, and the statistical definition of areas of London.

Figure 4.3: Number of London residents 1991-2017, total and by sub-area



Source: ONS mid-year population estimates

In addition, there are 289,000 night time workers in London who live outside the city, and 703,000 who work during the day in London but live outside London, but might enjoy London at night.

4.3.2 Ethnic mix of London residents

The London population is also ethnically diverse. 43% of its population is white British compared to 80% for the UK. The other largest groupings in London are Asian at 18% of the population, all other white at 16%, and black at 12%. In each case this is more than double the national proportion, Table 4.1.

Table 4.1: Ethnic composition of London and UK populations, 2016

	London	UK
population	8.8m	65.6m
white British	43%	80%
all other white	16%	6%
mixed	4%	2%
Asian	18%	7%
black	12%	3%
other	6%	2%

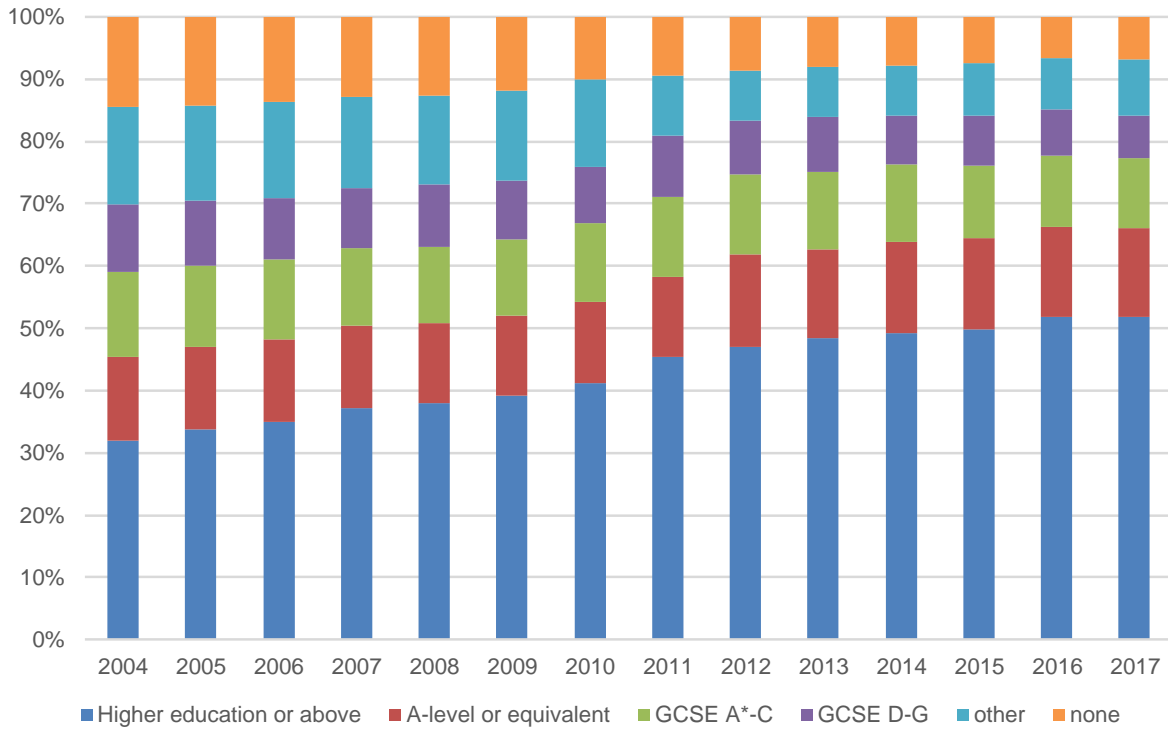
Source: ONS research report on population estimates by characteristics⁴⁴

⁴⁴ See [Research report on population estimates by characteristics - Office for National Statistics](#)

4.3.3 Qualifications of London residents

The London population is also relatively highly qualified, and the proportion of the population that is well qualified has risen both sharply and faster than for the UK as a whole. The proportion of 16-64 year olds with a higher education qualification⁴⁵ has risen from 32% in 2004 to 52% in 2017. In contrast, the growth for the UK has been from 26% to 32%, Figures 4.4 and 4.5⁴⁶.

Figure 4.4: Distribution of qualification levels for London residents, 2004-17



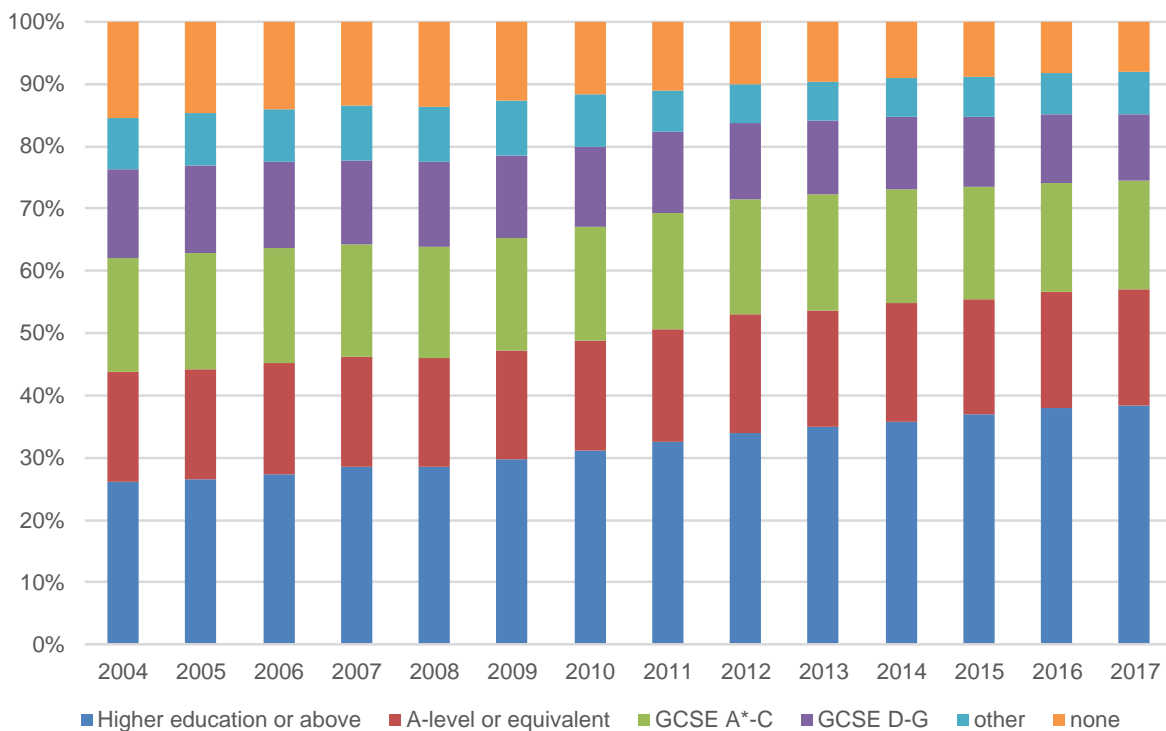
Source: ONS Annual Population Survey

Note: Higher education or above is NVQ level 4 or above, A-level or equivalent is NVQ level 3, GCSE A*-C is NVQ level 2, and GCSE D-G is NVQ level 1

⁴⁵ This is equivalent to NVQ4 and above, which includes certificates of higher education, and all types of degree

⁴⁶ Corresponding evidence for 25-64 year olds, which shows similar trends, is at Figure 4.6 of the [Skills strategy for Londoners: Evidence Base | London City Hall](#)

Figure 4.5: Distribution of qualification levels for UK residents, 2004-17



Source: ONS Annual Population Survey

Note: Higher education or above is NVQ level 4 or above, A-level or equivalent is NVQ level 3, GCSE A*-C is NVQ level 2, and GCSE D-G is NVQ level 1

There has also been a trend for workers in London to be more highly qualified⁴⁷.

This shift will have a bearing both on the income of households in London, as more highly qualified people can command higher earnings, and are more likely to be in managerial occupations⁴⁸, but may also impact on tastes and preferences for night time activities, and influence changes in behaviour.

4.3.4 Alcohol consumption of London residents

Alcohol is often consumed when going out at night. There are a number of ways for individuals to report their alcohol consumption in surveys, and aggregated estimates of individual responses on alcohol consumption tend to be lower than estimates of alcohol sales⁴⁹. In England surveys measuring typical alcohol consumption account for only around 60% of alcohol sold⁵⁰. Typical drinking, which is often what is sought in survey questions, does not account for drinking on atypical or special occasions which could explain 40% of the difference between surveyed consumption and national sales in England.

At a national level, there has been a long-term upward trend in the proportion of adults who don't drink⁵¹, driven by younger people, both men and women. While, for example, the

⁴⁷ See, for example, [London labour market projections 2016 | London City Hall](#)

⁴⁸ See, for example, [London labour market projections 2016 | London City Hall](#)

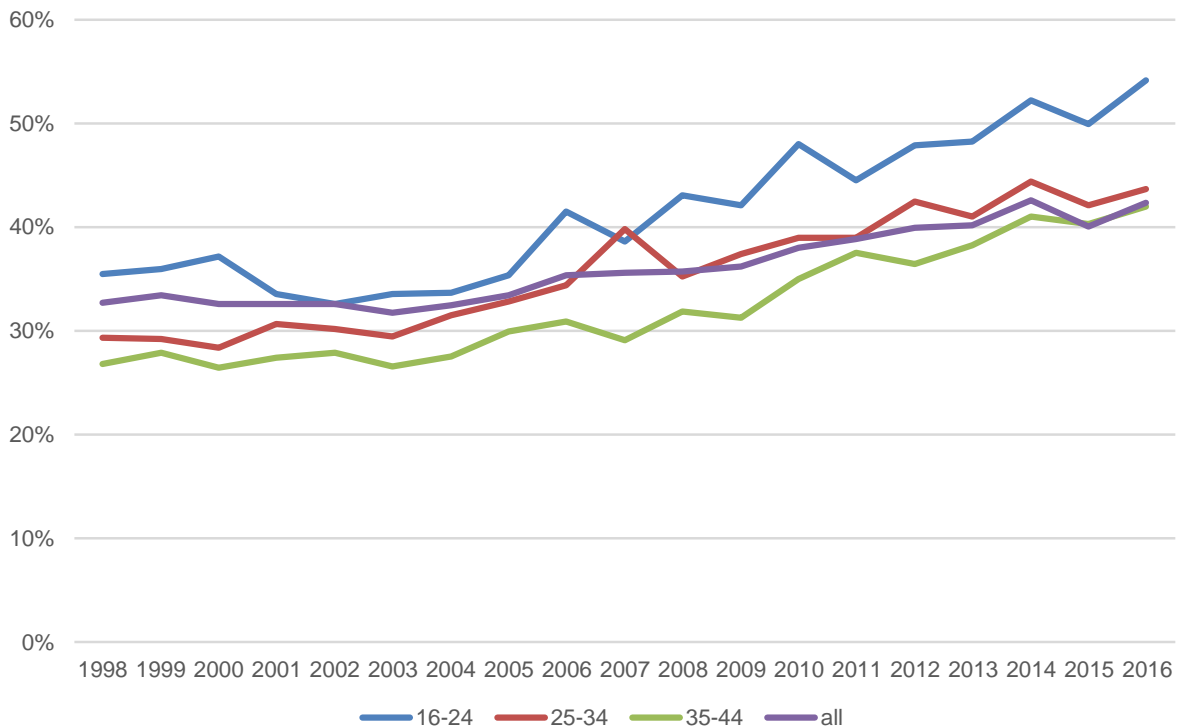
⁴⁹ For example, from tax receipts

⁵⁰ This paragraph draws from [Holidays, celebrations, and commiserations: measuring drinking during feasting and fasting to improve national and individual estimates of alcohol consumption | BMC Medicine | Full Text](#)

⁵¹ Social surveys consistently produce estimates of alcohol consumption that are lower than the levels indicated by alcohol sales data. This is likely to be because people either consciously or unconsciously underestimate their alcohol consumption.

proportion of 16-24 year of who are teetotal has risen from 35% to 54% for the period 1998 to 2016 the comparable proportions across the whole adult population are 33% and 42%, Figure 4.6. The definition used is estimated maximum alcohol use on any day in the last week, and has been used here because it provides a time series for nearly twenty years.

Figure 4.6: Proportion of adults, all and certain age groups, who are teetotal, England 1998-2016

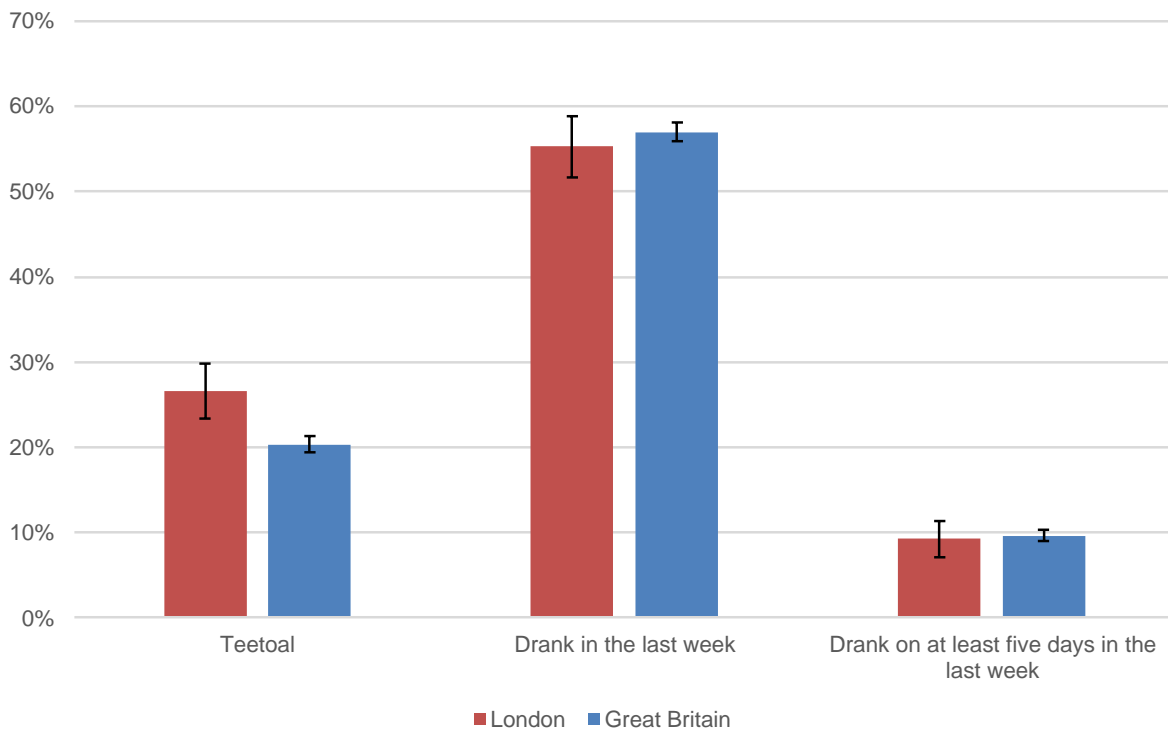


Source: NHS Digital, Health Survey for England

From 2011, the same survey, the Health Survey for England, has been asking about alcohol consumption over the last year, which is reporting a smaller proportion of the population that is teetotal⁵². This uses a slightly different question of volume of drinking in last week. The available evidence from an ONS survey suggests that London may not be dissimilar to the UK in its drinking habits when comparing the populations as a whole, Figure 4.7. This has similar estimates of teetotalism to the newer question on the Health Survey for England.

⁵² These figures, and for Figure 4.6, are available as part of the adult health trend tables at [Health Survey for England, 2016 - NHS Digital](#)

Figure 4.7: Share (%) of adults who drank alcohol in the previous week, London and Great Britain, 2017



Source: *Opinions and Lifestyle Survey*, Office for National Statistics
Note: the bands denote 95% confidence intervals

This, though, disguises a range of drinking patterns. For Great Britain⁵³:

- Drinking in the past week was more common among white people, at 61%, than those of other ethnicities, at 31%
- The level of teetotalism is less common among white people, at 16%, compared with 51% for other ethnic groups
- Young people aged 16-24 years are less likely to drink than other age groups; although, when they do drink, consumption on their heaviest drinking day tends to be higher.
- People working in managerial and professional occupations⁵⁴, were most likely to say they drank alcohol in the past week, at around 7 in 10 of people, compared to just over half of people working in routine and manual occupations⁵⁵
- Of those adults who had annual income of £40,000 or more, almost four in five said they drank in the previous week, compared to less than half for adults with annual income of less than £10,000

In summary London is overrepresented in both groups who are likely to drink relatively more than the national average, that is higher earners including managers and professionals, and groups who are likely to drink relatively less, that is ethnic minorities.

⁵³ See [Adult drinking habits in Great Britain - Office for National Statistics](#)

⁵⁴ This includes doctors, lawyers, architects, nurses and teachers

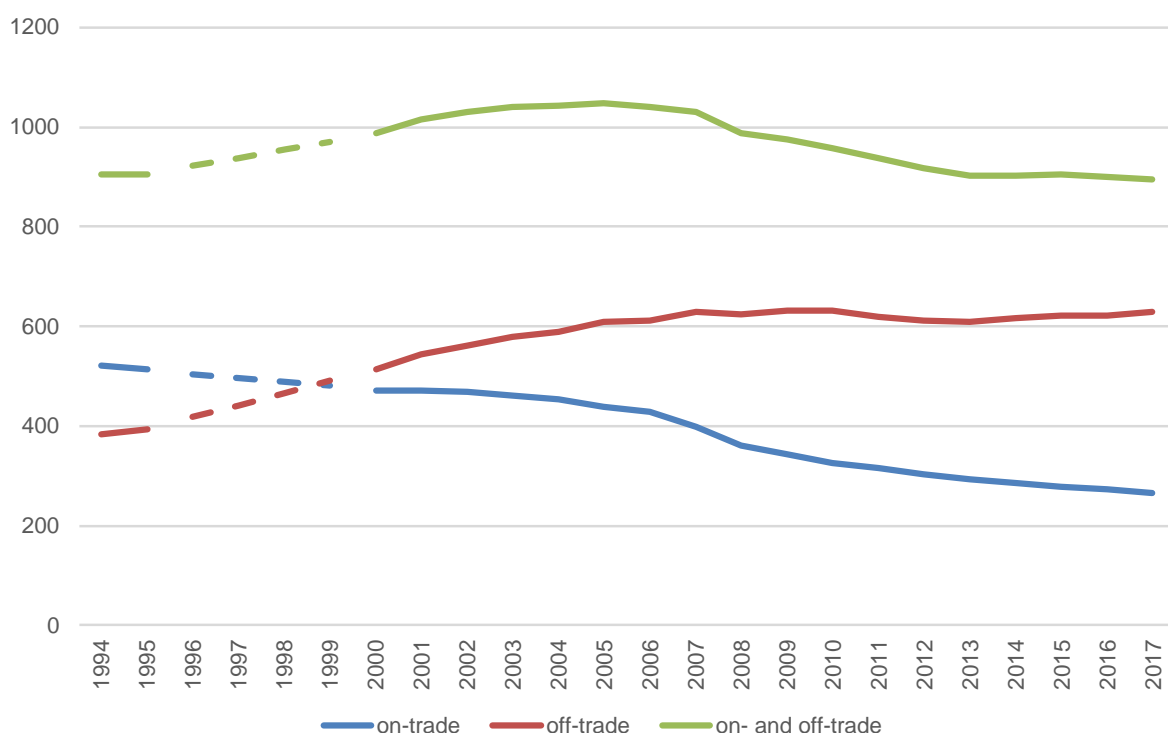
⁵⁵ This includes labourers, bar staff, lorry drivers, receptionists and care workers

Despite the trend towards teetotalism annual pure alcohol purchases in England and Wales have remained almost unchanged between 1994 and 2017 at 900 units per adult. What has changed is where it is bought, so:

- in 1994, 520 units of pure alcohol were bought from the on-trade, such as pubs and restaurants, and 380 from the off-trade, such as off-licenses and supermarkets, and;
- in 2017, 265 units of pure alcohol were bought from the on-trade, and 630 units from the off-trade

The on-trade accounted for 58% of sales of units of pure alcohol in 1994, and 30% in 2017 in England and Wales.

Figure 4.8: Volume of pure alcohol (units) sold per adult (aged 16+ years) in England and Wales, on- and off-trade and combined, 1994-2017



Source: *Monitoring and evaluating Scotland's Alcohol Strategy monitoring report*
Note: figures for 1996 to 1999 have been imputed

4.4 Income and expenditure of London residents

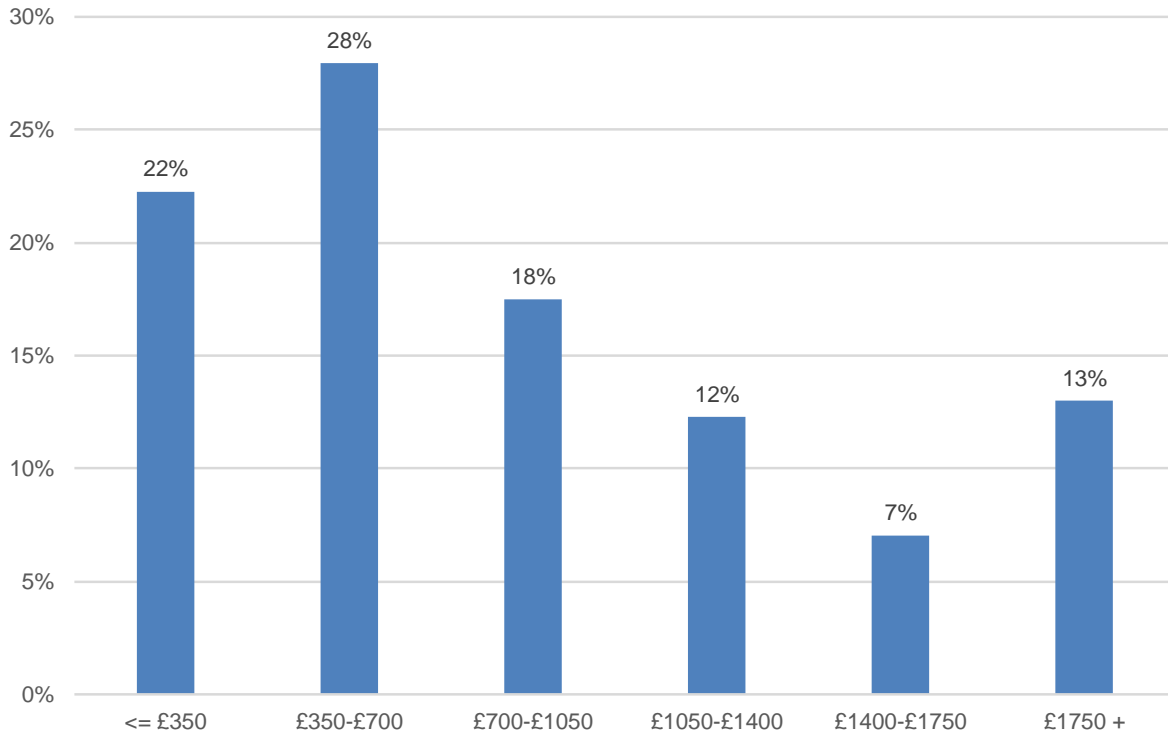
An aspect of going out at night, whether this might be going out at all or what to do, is affordability. This, in part, depends on the income and earnings of London residents, and other expenditure commitments, which this section explores.

London has a significant proportion of households on higher income, which might be from earnings, capital investments or benefit payments amongst other things. 20% have gross weekly income of £1400 or more, Figure 4.9. This reflects, in part, that earnings in London are on average somewhat higher than nationally⁵⁶.

⁵⁶ See, for example, [Demand for childcare in London - drivers and projections | London City Hall](#)

London also has a significant proportion of households with lower gross income, with 22% receiving less than £350 a week, and half receiving less than £700.

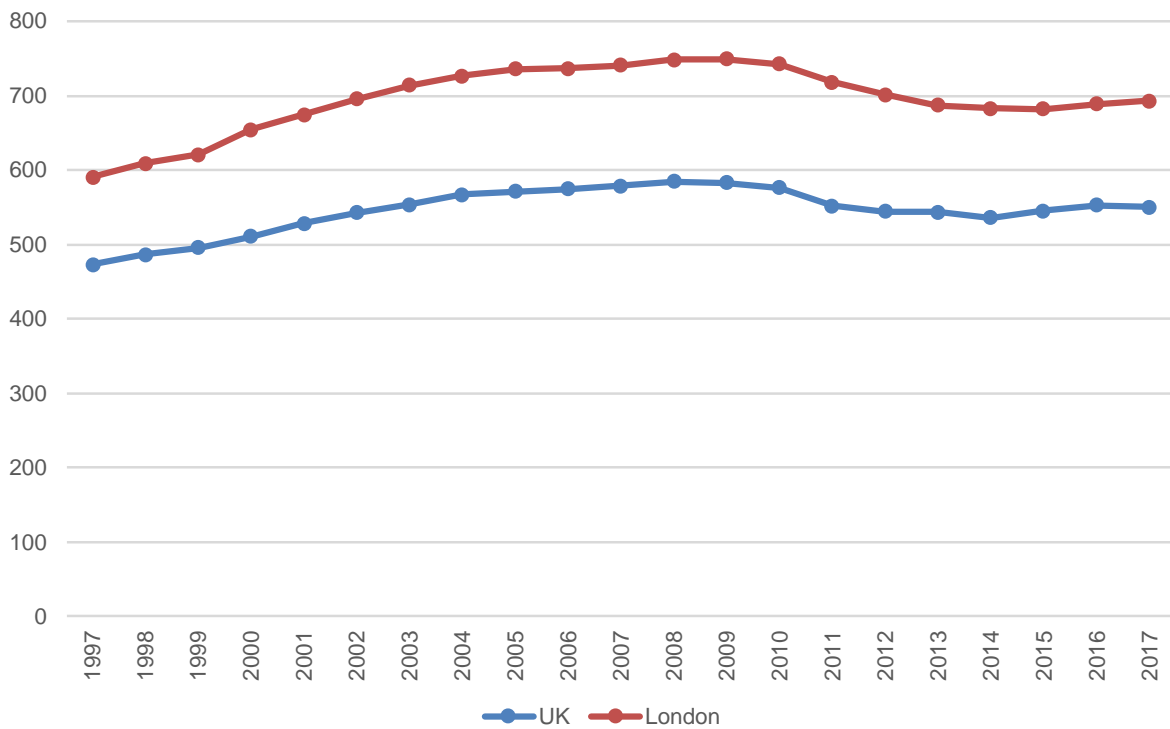
Figure 4.9: Distribution of gross weekly income of London households, 2014/15-2016/17



Source: DWP Family Resources Survey

Average earnings have stagnated in London with the level in 2017 being below that of 2002, after allowing for inflation, and 8% below the peak in 2009, Figure 4.10. Earnings are a quarter higher in London than the UK, and is consistent with Londoners being relatively more highly qualified. There will be considerable variation across households because some individuals will have enjoyed promotions, while there will be others in work for the first time. As these figures are for full-time employees, they do not capture movements in and out-of-work, or between full-time and part-time work, and nor do they take account of partner earnings for two adult households.

Figure 4.10: Median real gross weekly pay of full-time workers, London and UK, 1997-2017

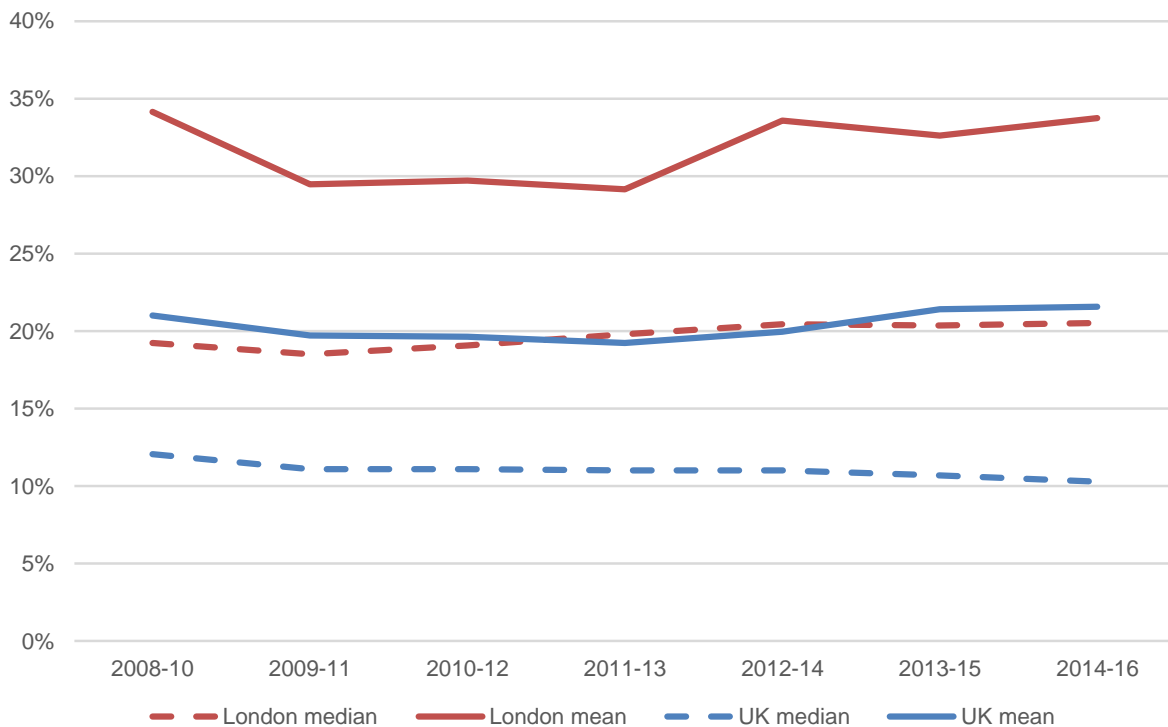


Source: ONS Annual Survey of Hours and Earnings, and Consumer Price Index

Note: Nominal earnings figures have been adjusted for inflation using Consumer Price Index

In terms of outgoings, there are also elements of household expenditure in London which are significantly higher than elsewhere. This is notable for housing costs, which for 2014-16 accounted for 10% of median household income in the UK, and 21% in London, with a similar difference when measuring mean income, Figure 4.11. These figures are averages, and will include households who have paid off their mortgage, mortgagees, and renters.

Figure 4.11: Average housing costs as a share of average net household incomes, London and UK, 2008-10 to 2014-16, median and mean



Source: GLA City Intelligence Unit calculations using DWP Households Below Average Income

Notes: Figures presented are three year averages. Excludes households with recorded income of less than £1 a week. Net income is gross income after tax payments and welfare receipts

Further, there is evidence that housing costs have been rising faster in London than elsewhere since 2012. ONS has published the results of a feasibility study for a series of regional price indices for 2010-17⁵⁷. Since 2012 general prices in London have been rising faster than nationally, and the analysis concludes that the elements of expenditure which have the most significant effect on regional price differences are owner occupiers' housing costs, and actual rents for housing.

Net income after housing costs provides a measure of disposable income, some of which would be available for going out. Many Londoners have too little income left after other costs to afford going out. This is despite there being many other Londoners who have comparatively more available to spend.

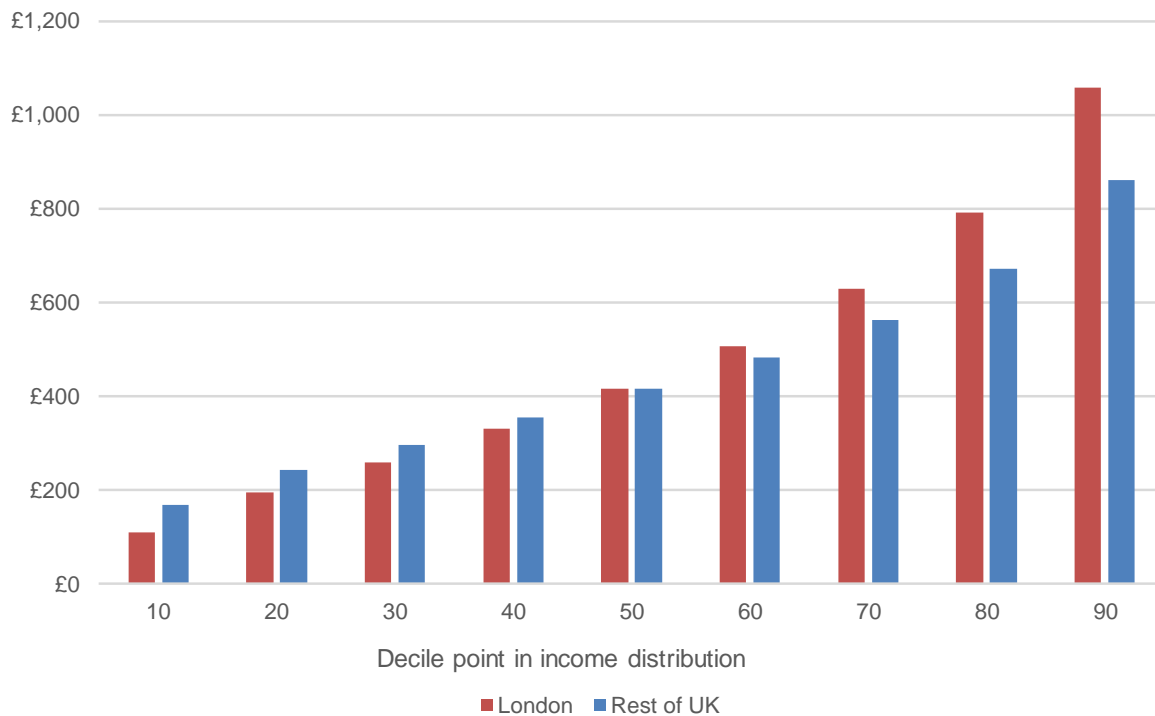
Figure 4.12 provides a comparison of the distribution of weekly household income after tax and housing costs for London and the rest of the UK. A process called equivalisation has been applied to reported income to account for differences in the size and composition of households, and provides a basis to compare standards of living across households. The figure shows that:

- the income distribution, after tax and housing costs, is wider in London than the rest of the UK
 - income in the top decile in London is 9.6 times the bottom decile
 - income in the top decile in the rest of the UK is 5.1 times the bottom decile

⁵⁷ See [Feasibility study into producing CPIH consistent inflation rates for UK regions - Office for National Statistics](#)

- income in the top decile in London is higher than income in the top decile in the rest of the UK, £1,059 per week compared with £862 per week
- income in the bottom decile in London is lower than income in the bottom decile in the rest of the UK, £111 per week compared with £169 per week
- median income in the UK and the rest of the UK is the same at £416

Figure 4.12: Distribution of household weekly income, after tax and housing costs, London and rest of UK, 2014/15-2016/17, reported figures are by decile point in the distribution



Source: DWP Households Below Average Income

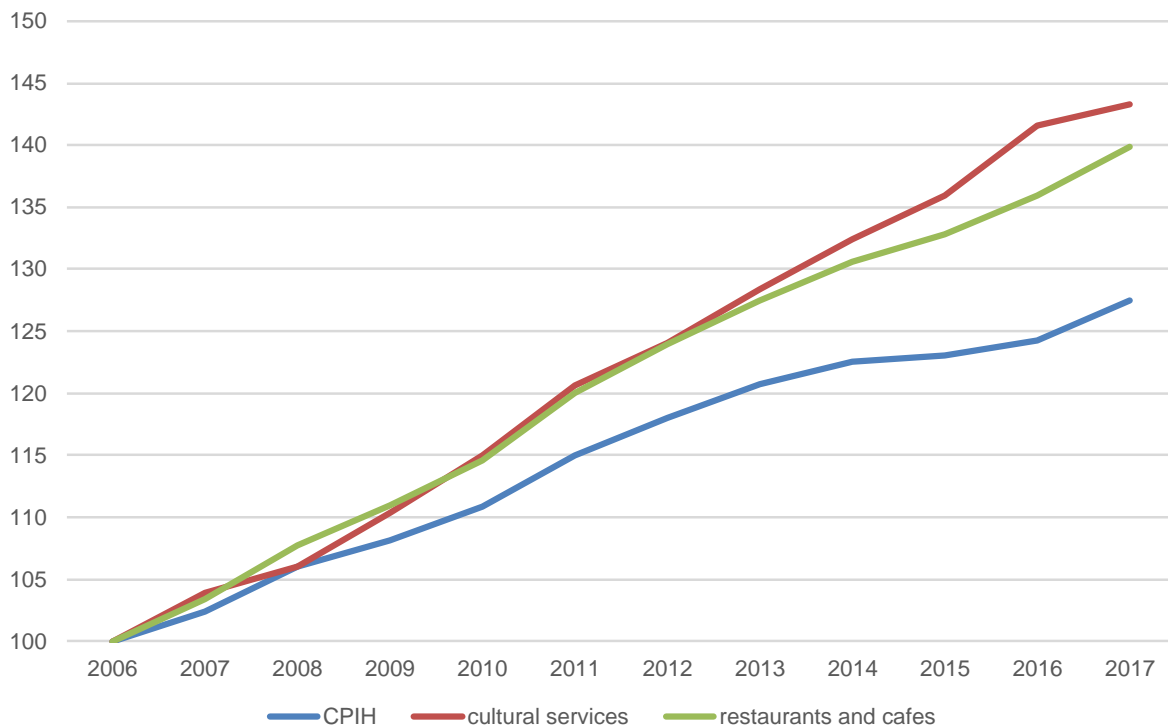
There is also evidence that childcare costs are higher in London than nationally and becoming less affordable⁵⁸, while the costs of repaying tuition fees will be felt disproportionately in London because of its young, well-educated population.

That is, despite the relatively higher incomes and earnings of London households there are also for many significant demands on their income. While experiences across households may be quite different in terms of income growth through earnings, and pressures on income from housing and childcare costs, for example, there will be households facing stagnant incomes, and increasing living costs. While the diversity of the night time offer in London may mean that there are options at a range of prices the available evidence would suggest that, if anything, the price of night time activities is rising slightly faster than general inflation⁵⁹, and so is becoming more costly. There is data within the elements of the Consumer Price Index for cultural services and restaurants and cafes, which shows this faster rise in prices, and this is reported at Figure 4.13.

⁵⁸ See [Demand for childcare in London - drivers and projections | London City Hall](#)

⁵⁹ As measured by the Consumer Price Inflation including owner occupiers' housing costs

Figure 4.13: UK price inflation index 2006-17, general prices and prices for certain night time activities, 2006=100



Source: ONS, Consumer price inflation tables

4.5 What London residents do at night

Londoners are more likely to stay up late than the rest of the UK population. 54% of Londoners say they usually go to bed after 11 pm (the UK figure is 48%), and 24% regularly go to bed after midnight (the UK figure is 19%)⁶⁰.

As well as disposable income what Londoners do at night will depend on a number of other factors, and perceived barriers to going out. This section looks at what people do by personal characteristics, and some of the factors which influence what they do.

65% of Londoners go out at night at least once a week, doing at least one of three options:

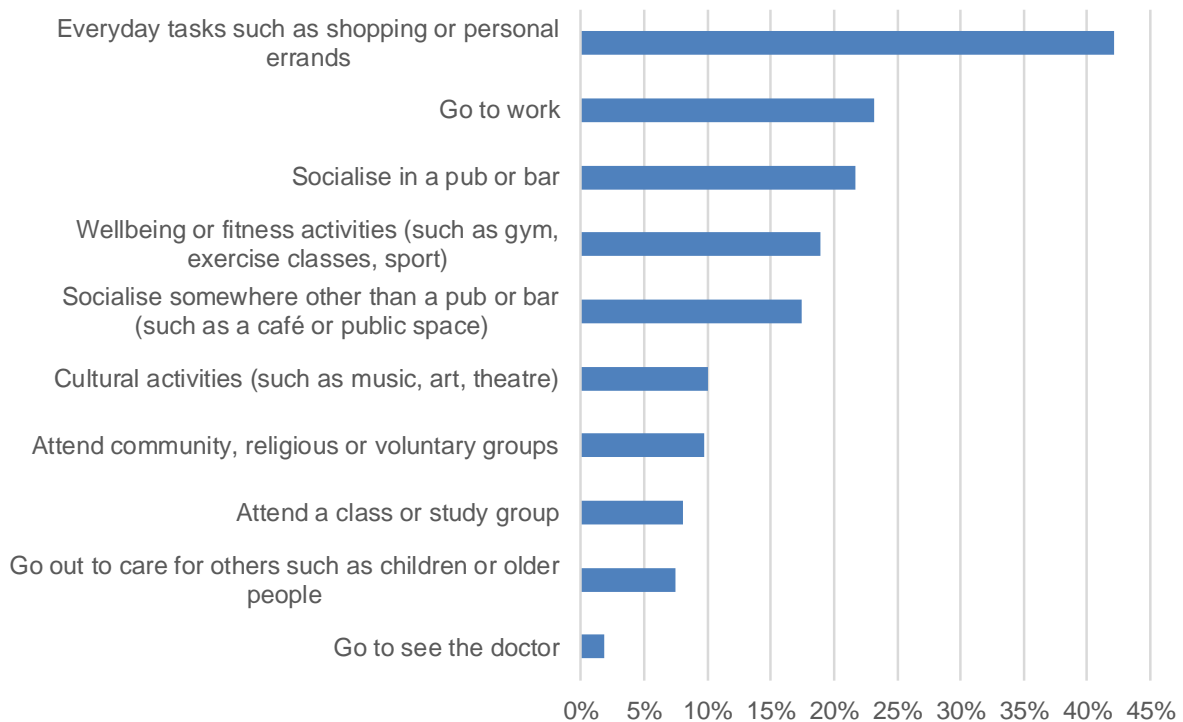
- 42% regularly do personal errands
 - Such as go to the shops or the doctor
- 42% engage in social and wellbeing activities
 - 22% socialise in a pub, bar, café, or some other public space
 - 19% attend a gym, exercise classes, or a sport
 - 10% attend cultural activities, such as music, art, or theatre
 - 10% attend community, religious, or voluntary groups
- 31% work, study, or provide care at night⁶¹
 - 23% go to work
 - 8% attend a class or study group
 - 8% go out to care for others such as children or older people

⁶⁰ See [Reports - The Sleep Council](#), see 2013 report

⁶¹ These are Londoners' self-reported activities. The percentage who work at night is of all Londoners, and not people who work in London, as reported in Chapter 3.

Many of the Londoners who go out will engage in more than one activity, Figure 4.14.

Figure 4.14: Proportion of London residents who engage in various activities at night at least once a week



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

While it is the norm for Londoners to go out at night the same survey reports that 27% of all Londoners express no particular interest in going out in London at night at all.

In broad terms, younger and inner Londoners, men, ethnic minorities, non-disabled, and people of higher social grade (ABC1) are more likely to do most of these listed activities at night at least once a week. Yet there is significant variation across the activities for the groups, demonstrating the diversity of experience of Londoners of the city at night. For a more detailed breakdown Figures 4.14-4.19 provide a breakdown of engagement by activity for each of the groups. (The breakdowns for going to work are not provided as a matter of course as there is more comprehensive information in Chapter 3, and the figures are included as part of the published research⁶².)

London residents aged 50 or under are more likely to do one of the activities listed at night at least once a week than older age groups across most of the range of activities. For example, amongst those who socialised in a pub or bar were:

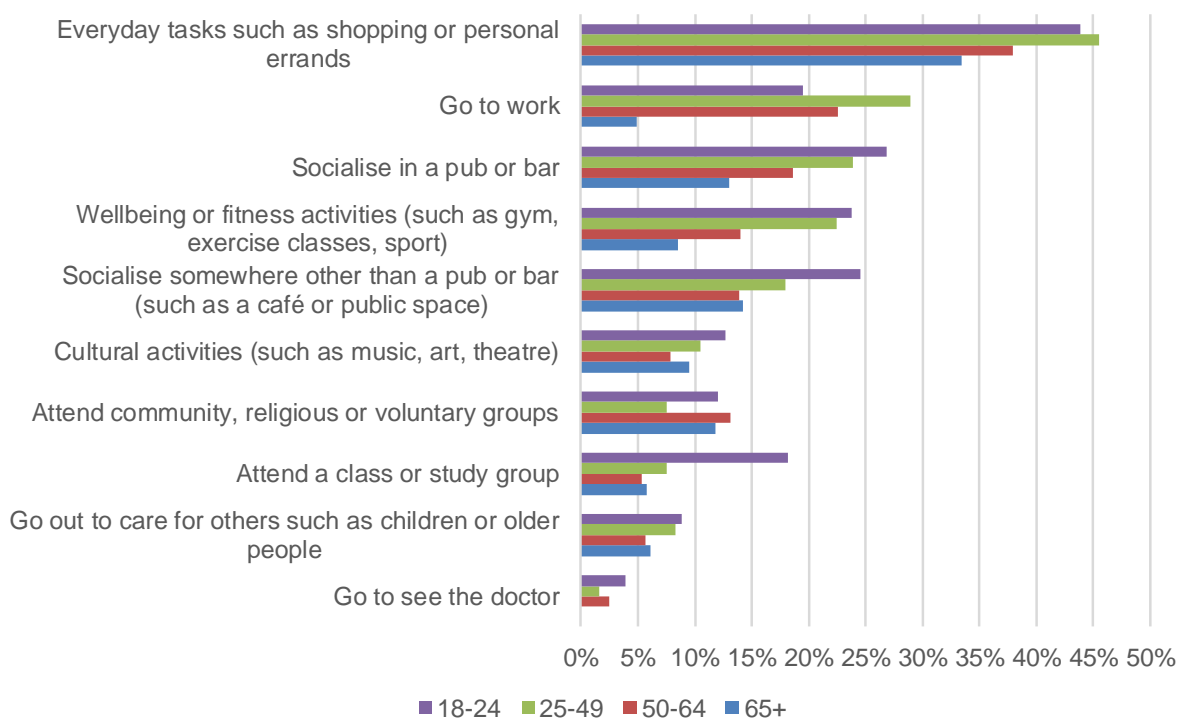
- 27% of all 18-24 year olds
- 24% of all 25-49 year olds
- 19% of all 50-64 year olds
- And, 13% of all 65+ year olds

⁶² See [London Datastore](#)

The only activity where engagement by people aged 50 and over was similar, or higher, to other younger age groups was to attend community, religious or voluntary groups, Figure 4.15, where attendance by age group was:

- 12% of all 18-24 year olds
- 8% of all 25-49 year olds
- 13% of all 50-64 year olds
- 12% of all 65+ year olds

Figure 4.15: Proportion of London residents who engage in various activities at night at least once a week by age group



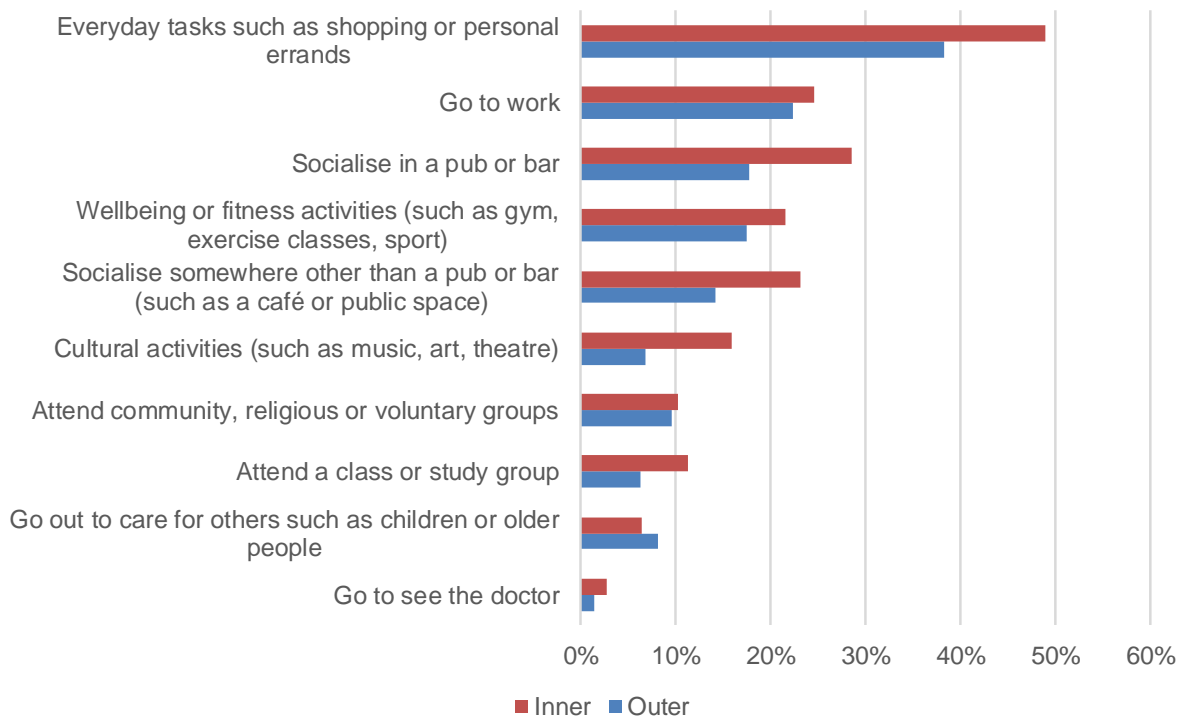
Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

Inner Londoners are more likely to do one of the activities listed at night at least once a week than outer Londoners across most of the range of activities. For example:

- 29% of inner Londoners, and 18% of outer Londoners, socialised in a pub or bar
- 23% of inner Londoners, and 14% of outer Londoners, socialised somewhere other than a pub or bar (such as a café or public space)
- 22% of inner Londoners, and 17% of outer Londoners, attended wellbeing or fitness activities (such as a gym, exercise classes or sport)

The only activity which outer Londoners engaged more was to go out to care for others such as children or older people at 8% of this group, and 6% of inner Londoners, Figure 4.16.

Figure 4.16: Proportion of London residents who engage in various activities at night at least once a week by area in London of residence



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

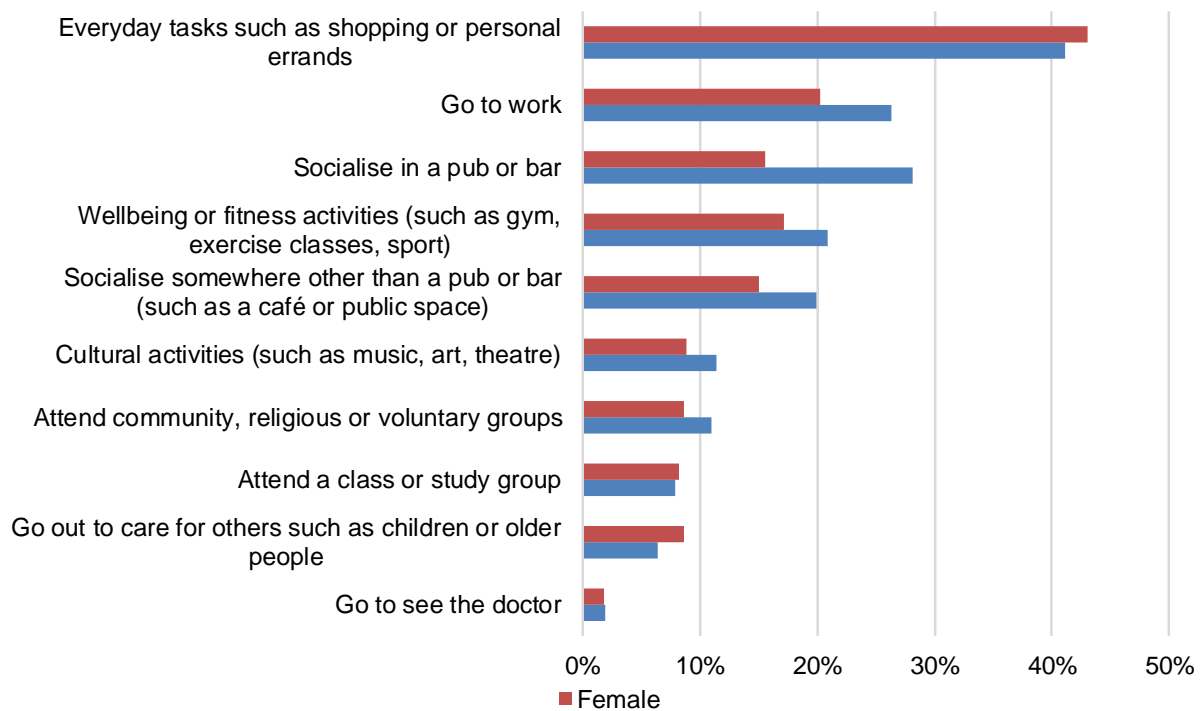
Men are more likely to do one of the activities listed at night at least once a week than women across most of the range of activities, Figure 4.17. For example:

- 28% of men, and 16% of women, socialised in a pub or bar
- 20% of men, and 15% of women, socialised somewhere other than a pub or bar
- 21% of men, and 17% of women, attended wellbeing or fitness activities

Women are more likely to do two of the activities more than men:

- 41% of men, and 43% of women, did everyday tasks such as shopping or personal errands
- 6% of men, and 9% of women, went out to care for others such as children or older people

Figure 4.17: Proportion of London residents who engage in various activities at night at least once a week by gender



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

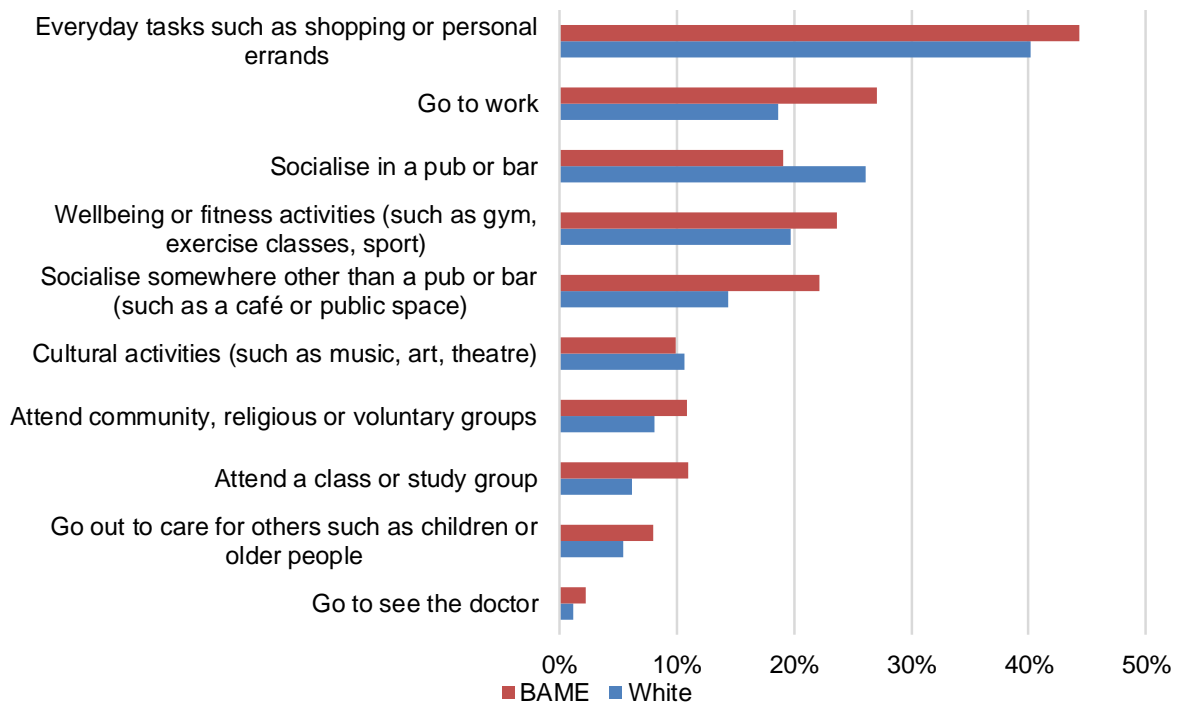
BAME Londoners are more likely to do one of the activities listed at night at least once a week than white Londoners across most of the range of activities, Figure 4.18. For example:

- 44% of BAME Londoners, and 40% of white Londoners, did everyday tasks such as shopping or personal errands
- 22% of BAME Londoners, and 14% of white Londoners, socialised somewhere other than a pub or bar
- 24% of BAME Londoners, and 20% of white Londoners, attended wellbeing or fitness activities

White Londoners are more likely to do two of the activities more than BAME Londoners:

- 19% of BAME Londoners, and 26% of white Londoners, socialised in a pub or bar – although it is relatively more common for BAME Londoners to socialise elsewhere
- 10% of BAME Londoners and 11% of white Londoners, engaged in cultural activities (such as music, art, or theatre)

Figure 4.18: Proportion of London residents who engage in various activities at night at least once a week by ethnicity



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

Non-disabled Londoners are more likely to do one of the activities listed at night at least once a week than self-reported disabled Londoners across most of the range of activities, Figure 4.19. For example:

- 45% of non-disabled Londoners, and 37% of disabled Londoners, did everyday tasks such as shopping or personal errands
- 27% of non-disabled Londoners, and 14% of disabled Londoners, went to work
- 25% of non-disabled Londoners, and 17% of disabled Londoners, socialised in a pub or bar

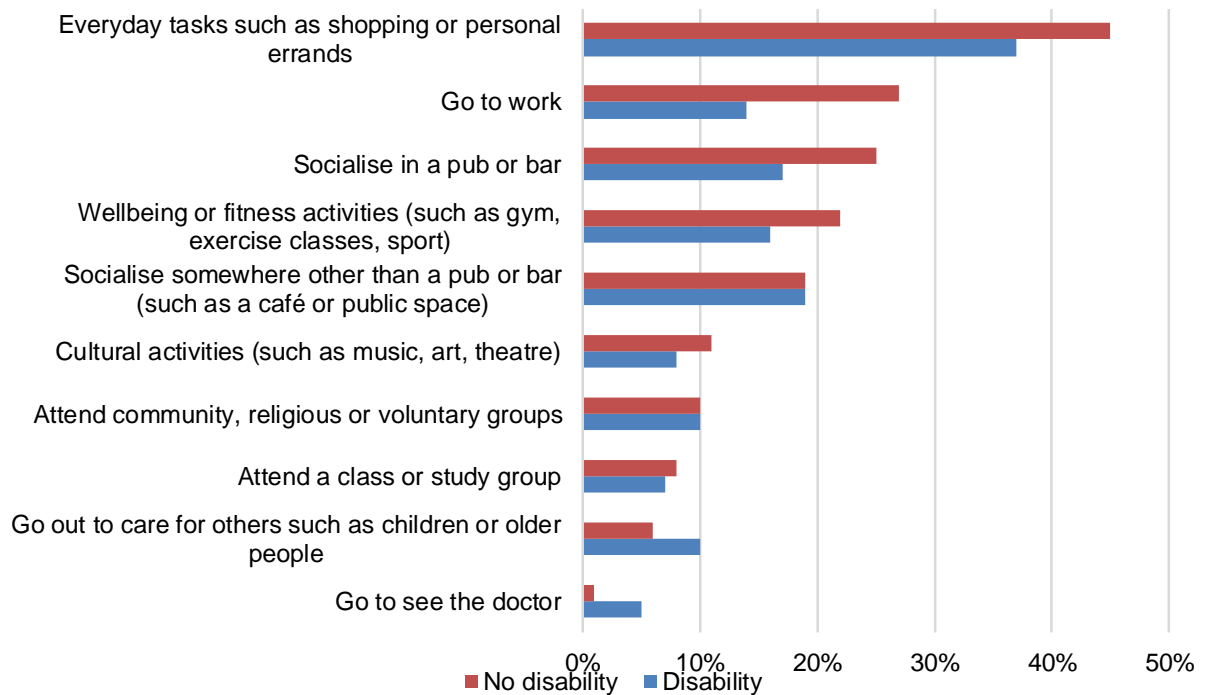
Disabled Londoners are more likely to do two of the activities more than non-disabled Londoners:

- 6% of non-disabled Londoners, and 10% of disabled Londoners, went out to care for others such as children or older people
- 1% of non-disabled Londoners, and 5% of disabled Londoners, went to the doctor

There are two activities where the level of engagement at night is the same for disabled and non-disabled Londoners:

- 19% of non-disabled and disabled Londoners, socialised in a pub or bar – as with BAME Londoners this contrasts with socialising in a pub or bar
- 10% of non-disabled and disabled Londoners attended community, religious, or voluntary groups

Figure 4.19: Proportion of London residents who engage in various activities at night at least once a week by self-reported disability



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

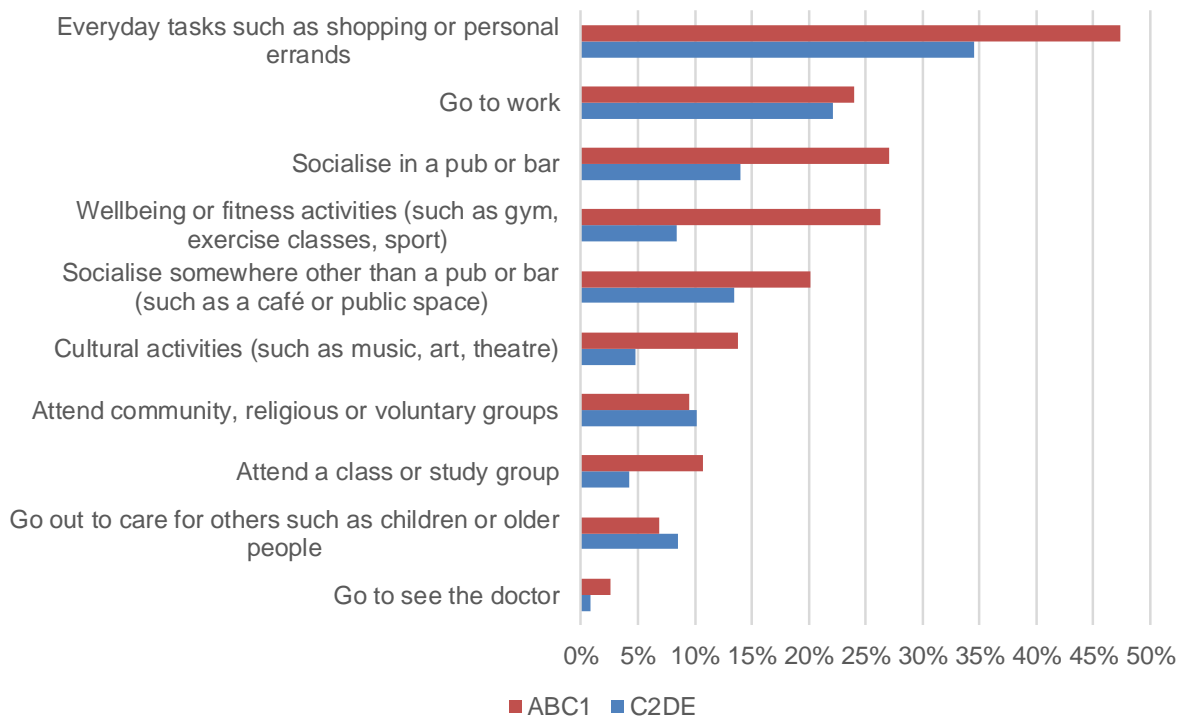
Higher social grade (ABC1) Londoners are more likely to do one of the activities listed at night at least once a week than lower social grade (C2DE) Londoners across most of the range of activities, Figure 4.20. For example:

- 47% of ABC1s, and 35% of C2DEs, did everyday tasks such as shopping or personal errands
- 24% of ABC1s, and 22% of C2DEs, went to work
- 26% of ABC1s, and 8% of C2DEs, attended wellbeing or fitness activities

DEs are more likely to do two of the activities more than ABC1s:

- 10% of ABC1s, and 10% of C2DEs, attended community, religious or voluntary groups (proportions the same after rounding)
- 7% of ABC1s, and 8% of C2DEs, went out to care for others such as children or older people

Figure 4.20: Proportion of London residents who engage in various activities at night at least once a week by social grade



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

4.6 Barriers to going out at night for Londoners, and opportunities

There are a number of barriers which prevent Londoners going out at night, and will affect both the 65% who went out the previous week, and the 35% who did not:

- 36% find it is too expensive to go out in London at night
- 27% are not particularly interested in going out at night
- 19% do not have enough free time
- 19% do not feel safe in London at night
- 14% report that it takes too long for me to travel around London at night
- 14% find that too many places revolve around alcohol

While 14% say they have no real barriers to going out in London at night, Figure 4.21.

Figure 4.21: Barriers to going out in London at night for all Londoners, proportions



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

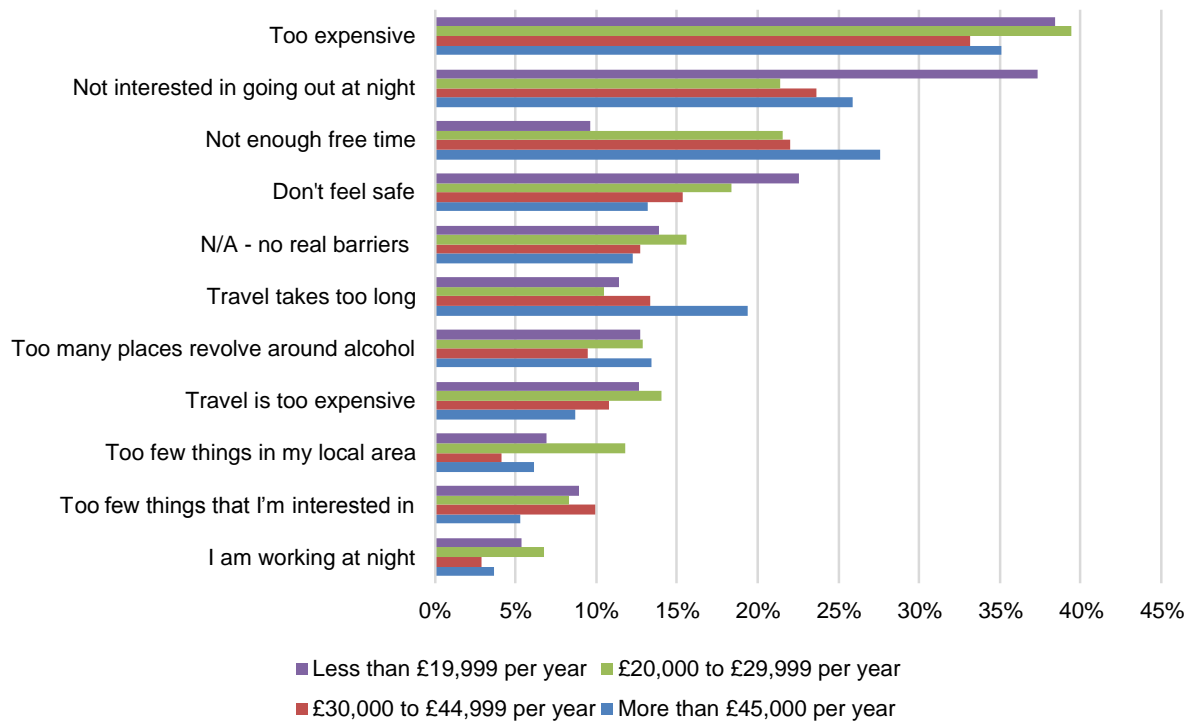
Across household income band expense is the main barrier to going out at night (38% for households on income under £30,000 a year, and 35% for households on income of more than £45,000 a year), Figure 4.22.

There are, though, some clear patterns of barriers for the lowest and highest income bands, which are noticeably more important than for other income bands:

- For households on less than £20,000 a year
 - 37% are not interested in going out at night
 - 23% don't feel safe in going out
- For households on more than £45,000 a year
 - 26% are not interested in going out at night
 - 28% don't have enough free time
 - 19% say that travel takes too long

So, while Londoners in the lowest and highest income bands of households are the least interested in going out at night the groups have quite different barriers to going out at night around time and safety.

Figure 4.22: Barriers to going out in London by gross household income band, proportions



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

Across social grades expense is the main barrier to going out at night (37% for ABC1s, and 36% for C2DEs), Figure 4.23.

Lower social grade Londoners have less interest in going out at night, and feel less safe in London:

- 25% of ABC1s, and 31% of C2DEs, are not particularly interested in going out at night
- 17% of ABC1s, and 20% of C2DEs, do not feel safe in London at night

While higher social grade Londoners are more likely to say they don't have enough free time, or that it takes too long to travel around:

- 21% of ABC1s, and 16% of C2DEs, do not have enough free time
- 15% of ABC1s, and 11% of C2DEs, report that it takes too long to travel around London at night

These findings parallel the findings for Londoners in the lowest and highest income household bands.

Figure 4.23: Barriers to going out in London at night by social grade, proportions



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

Across families with and without children expense remains the main barrier to going out at night, although there is a significant difference depending on whether or not there are children (39% for families without children, and 27% for families with children), Figure 4.24.

For families with children not having enough free time is of equal importance as a barrier, while it is a barrier for 16% of families without children.

While more families without children are not interested in going out at night at 29% of such families, compared to 26% of families with children.

Figure 4.24: Barriers to going out in London at night by numbers of children under 18 in household, proportions



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

Cost is the main barrier to going out at night for Londoners under 65, Figure 4.25. London is too expensive at night for:

- 50% of 18-24 year olds
- 38% of 25-49 year olds
- 36% of all Londoners
- 31% of 50-64 year olds
- 27% of 65+ year olds

Older people are less likely to be particularly interested in going out at night, or face barriers to going out, and have too few things on offer of interest:

- 44% of 65+ years olds, and 35% of 50-64 year olds, are not particularly interested in going out at night
- 23% of 65+ year olds, have no real barriers to going out at night – the figure of 14% for 50-64 year olds is the same as for all Londoners
- 13% of 65+ year olds, and 12% of 50-64 year olds, have too few things on offer of interest

While younger Londoners are more likely to say they don't have enough free time, or that it takes too long to travel around:

- 20% of 18-24 year olds, and 24% of 25-49 year olds, do not have enough free time
- 23% of 18-24 year olds, and 15% of 25-49 year olds, say it takes too long to travel around London at night

Perceptions of safety are similar across age groups.

Figure 4.25: Barriers to going out in London at night by age group, proportions



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

Cost is the main barrier to going out at night for white and BAME Londoners, Figure 4.26. London is too expensive at night for:

- 34% of BAME Londoners
- 36% of white Londoners

BAME Londoners are more likely to say they don't have enough free time, or that too many places revolve around alcohol:

- 27% of BAME Londoners, and 18% of white Londoners, do not have enough free time
- 17% of BAME Londoners, and 10% of white Londoners, say too many places revolve around alcohol

Perceptions of safety are similar across groups.

Figure 4.26: Barriers to going out in London at night by ethnicity, proportions



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

It is consistent that ethnic minority respondents are relatively more likely to regard that too many places revolve around alcohol, and socialise elsewhere, and relatively less likely to socialise in a pub or bar. Further, some GLA City Intelligence Unit focus group participants would like to see more low/no alcohol options. This suggests that when some people see alcohol as a barrier to going out what they want is more diversity in the night time offer.

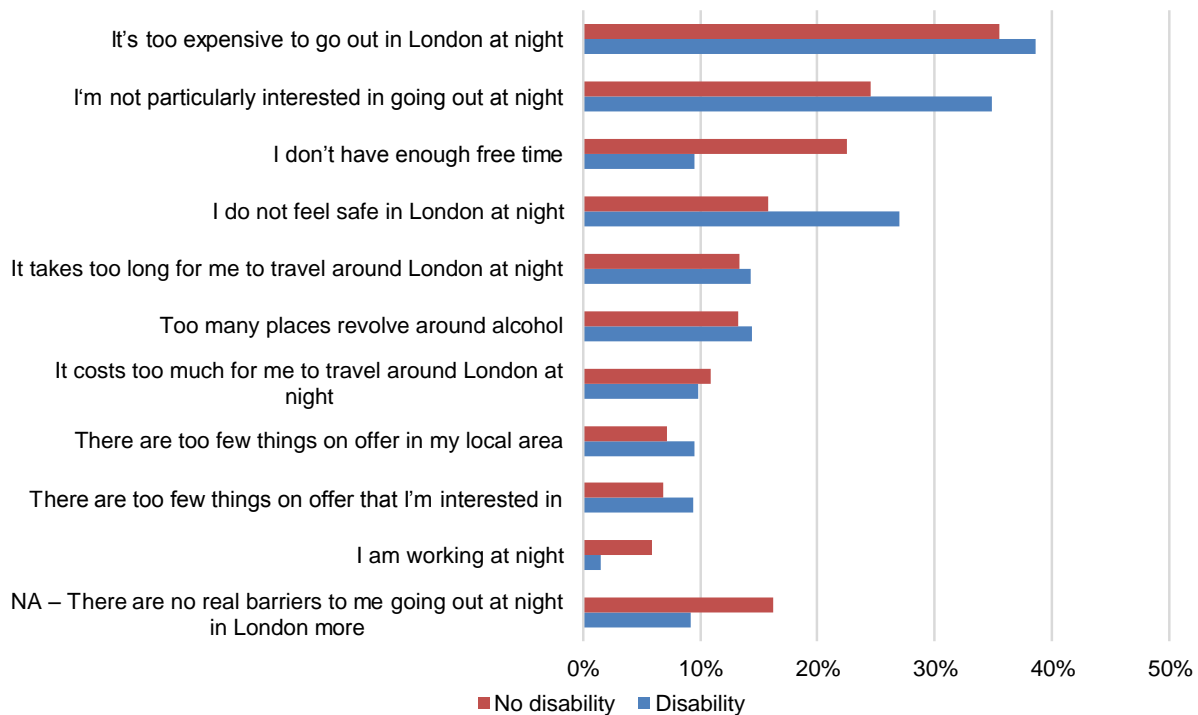
Cost is the main barrier to going out at night for both disabled and non-disabled Londoners, Figure 4.27. London is too expensive at night for:

- 39% of disabled Londoners
- 35% of non-disabled Londoners

While disabled Londoners are more likely to say that they are not particularly interested in going out at night, or do not feel safe at night:

- 35% of disabled Londoners, and 25% of non-disabled Londoners, are not particularly interested in going out at night
- 27% of disabled Londoners, and 16% of non-disabled Londoners, do not feel safe in London at night

Figure 4.27: Barriers to going out in London at night by self-reported disability, proportions



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

There is relatively little difference of perceptions of barriers between inner and outer Londoners.

The opinion research results reported in this section has provided a high level overview of barriers to participating in activities in London at night. There is no systematic evidence on how well different groups feel able to contribute to London’s nightlife, and participate in it at a more granular level. There are stories of sufficient credibility that they have been picked up by the mainstream media that this is not always the case. For example, concerts by ethnic minority artists, such as grime artists, appear to have been cancelled without due justification⁶³, and ethnic minorities have not been allowed entry to certain night clubs because of the colour of their skin⁶⁴.

In terms of opportunities focus group participants to the GLA City Intelligence Unit opinion research⁶⁵ said they like the way that London at night has developed over recent years. London’s night time offer is seen to cater to all types of people, with lots of variety in terms of entertainment and culture.

Participants enjoyed London at night for its entertainment offer and opportunities to meet friends or spend time with families. Central London is seen as a good meeting spot for outer London residents, or those with friends or family scattered around London/UK.

⁶³ See [Form 696: Concern over 'racist' police form to be raised - BBC News](#)

⁶⁴ See [London clubs and racism: 'The West End is a hostile environment' | World news | The Guardian](#)

⁶⁵ See [London Datastore](#). There were six focus groups with 46 participants in total between December 2017 and January 2018

Going out was seen as a good way to meet new people and learn about different cultures – London is seen to be more sociable at night, particularly among pre-family participants, including those who are new to London.

Few participants in the focus groups did personal chores at night (e.g. late-night shopping, GP, gym). Most are able to do this during the day or on the weekend. However, participants across all groups would like more amenities to stay open late – out of convenience, more than necessity. Having the option to do these after 6pm is seen to help free up the weekends and reduce the demand during the week. Some like doing these at night as it can be more enjoyable – quieter and less busy at night.

Participants said that improved public transport (the night bus and Night Tube), and more on offer closer to where people live, has made it easier to access and enjoy London at night. However, there were some concerns among family and post-family participants that it is losing its authenticity and unique character. Closure of late night venues and earlier closing times is also seen to be damaging London's night time offer.

The focus group component of this GLA City Intelligence Unit opinion research concluded that most participants would like to see London's night time offer develop, and identified possible ways forward:

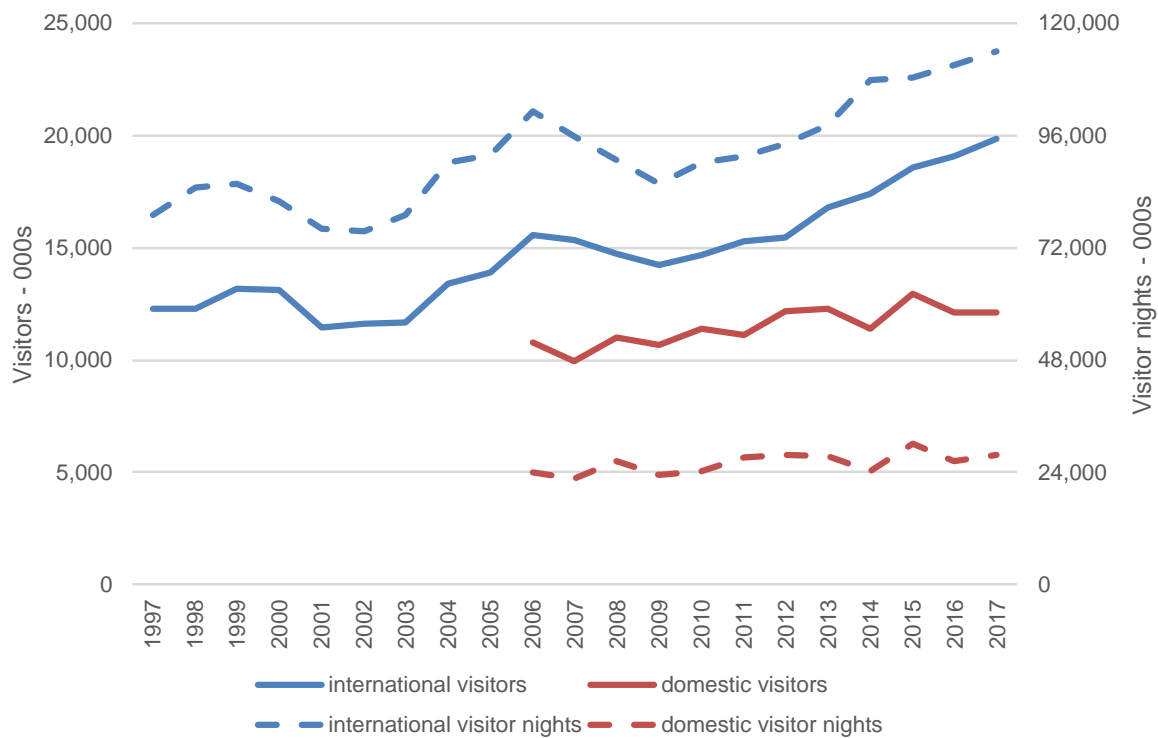
- Make better use of derelict areas, such as industrial estates, and set up 24-hour venues or services in isolated locations away from residents
- Outer Londoners would like more local options and variety outside Zone 1, while many still enjoy experiencing central London, and getting out of their local area
- More options and variety for late-night food and drink, as often only fast-food outlets are open late
- More free events or activities, and 'non-alcohol' options at night, eg museums, community centres, festivals and markets
- Night time workers are often unable to do chores, such as shopping or going to the bank, during the day and would value more late-night opening
- Better promotion of events and activities at night, as well as more deals and discounts
- Move events around London, eg move Chinese New Year to Clapham Common, or Proms in the Park to Victoria Park

4.7 Numbers and experience of London overnight visitors

Overnight visitors are another group who go out at night in London. This section brings together the available evidence on overnight visitors, and visitor numbers, and where they stay. It incorporates evidence from Annex C on international evidence on the night time offer.

In 2017 there were 19.8m international visitors to London who stayed overnight, and 12.1m domestic visitors who stayed overnight. Since 2006 international visitors have been around 60% of all visitors. There were 114.0m international visitor nights in 2017, and 27.8m domestic visitor nights. Since 2006 international visitor nights have been around 80% of all visitor nights, Figure 4.28. International visitors stay on average around six nights in London, while domestic visitors stay a little over two nights.

Figure 4.28: Overnight visitors and visitor nights to London, domestic and international, 1997-2017



Source: International Passenger Survey (for international visitors) and Great Britain Tourism Survey (for domestic visitors)

Note: series for domestic visitors began in 2006

International visitors spent £13.5 billion pounds in London in 2017⁶⁶.

Domestic visitors spent £2.7 billion pounds in London in 2017, which was 14% of expenditure on domestic overnight visits in England. Domestic visitors to London accounted for 12% of trips, and 9% of nights.

Annex C reviews international evidence on the night time offer. London is perceived as a global city and most of the international rankings corroborate its image of global leadership as a place to visit and go out at night:

- Third largest number of international arrivals of any world city, 19.2 million in 2016
- Amongst visitors, and potential visitors, London ranks second as an enjoyable city
- A comparatively high proportion of credit card spending in person at night, at 34% of all credit card spending over a day⁶⁷
- Consistently high rank internationally in the provision of cultural venues and performances
 - 3rd highest number of cinemas
 - 4th highest for major concert halls
 - 4th highest for music performances

⁶⁶ See [Leisure and tourism - Office for National Statistics](#)

⁶⁷ This will be by residents as well as visitors

Indeed, four out of five visitors say culture and heritage is the main reason for their visit to London⁶⁸.

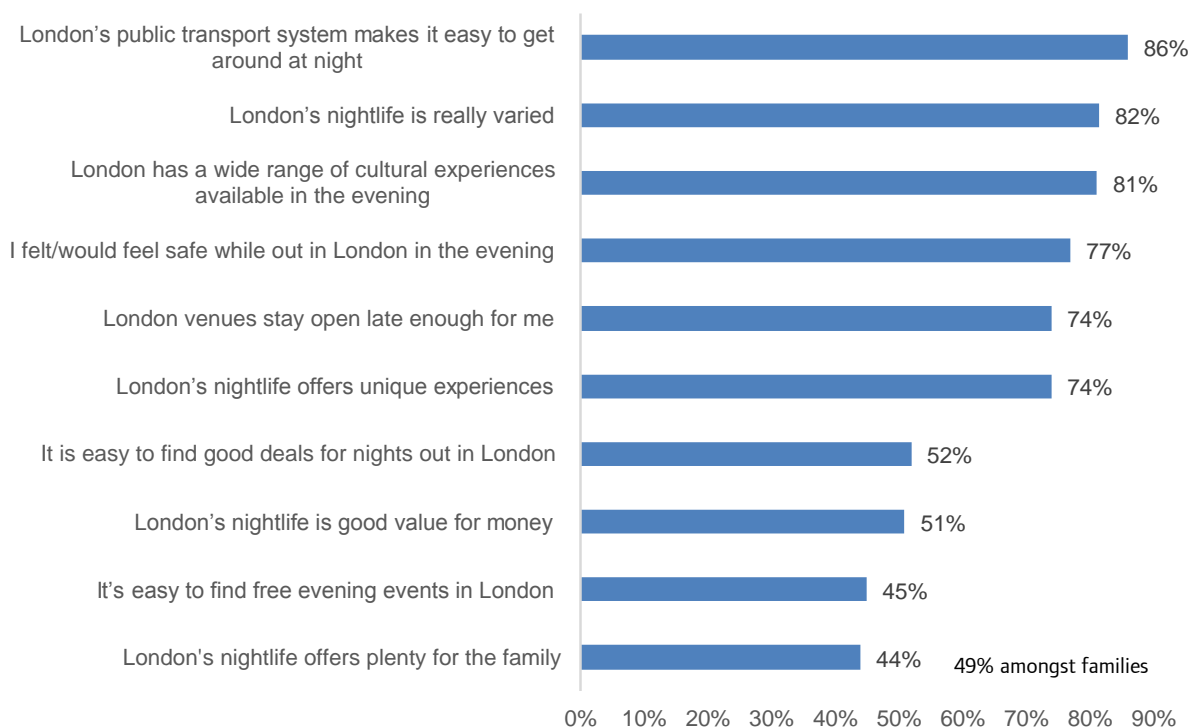
London & Partners conducted a one-off online survey in 2017⁶⁹ to understand the opinions and experiences of previous and potential first-time London visitors, both national and international, of London night-life. The main findings are presented below, in Figures 4.29-4.34 and Table 4.2:

Almost three quarters of visitors, 73%, were satisfied with London’s nightlife.

A very high percentage of London visitors considered that **the capital offers good transport and varied nightlife, including a wide cultural offer, although fewer felt that it provided value for money**, Figure 4.29:

- 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% agreed that London’s nightlife is good value for money
- 45% agreed that it’s easy to find free evening events in London

Figure 4.29: % of previous and potential London visitors who agree (strongly/slightly) with various statements about London’s nightlife



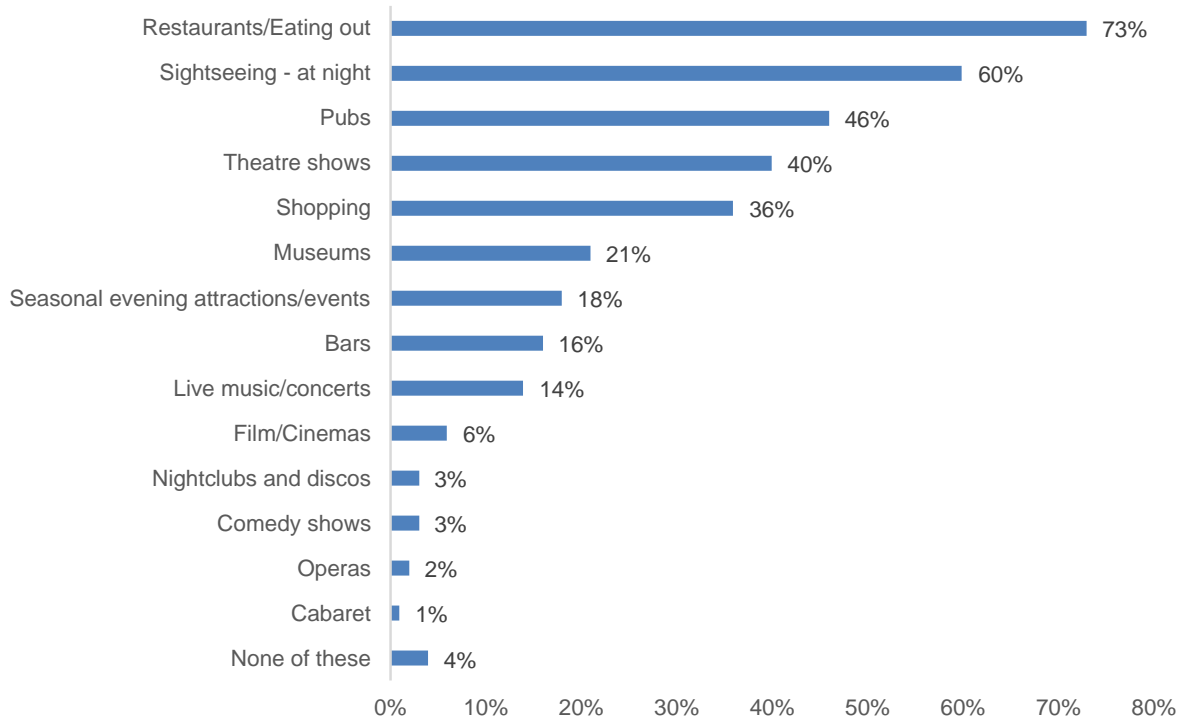
Source: London & Partners (2017), 'Visitor Voice London Nightlife Research'. The surveyed visitors were users of the London & Partners website, and mostly come from English speaking countries.

⁶⁸ See [Cultural tourism vision for London | London City Hall](#), specifically Appendix 2

⁶⁹ Source: London & Partners (2017), 'Visitor Voice London Nightlife Research'. Respondents were on the London & Partners Visitor Voice panel. The surveyed visitors were users of the London & Partners website, and mostly come from English speaking countries.

Visitors prefer to go to restaurants (73%), go sightseeing (60%), drink at pubs (46%), watch theatre shows (40%), and go shopping (36%) at night, Figure 4.30.

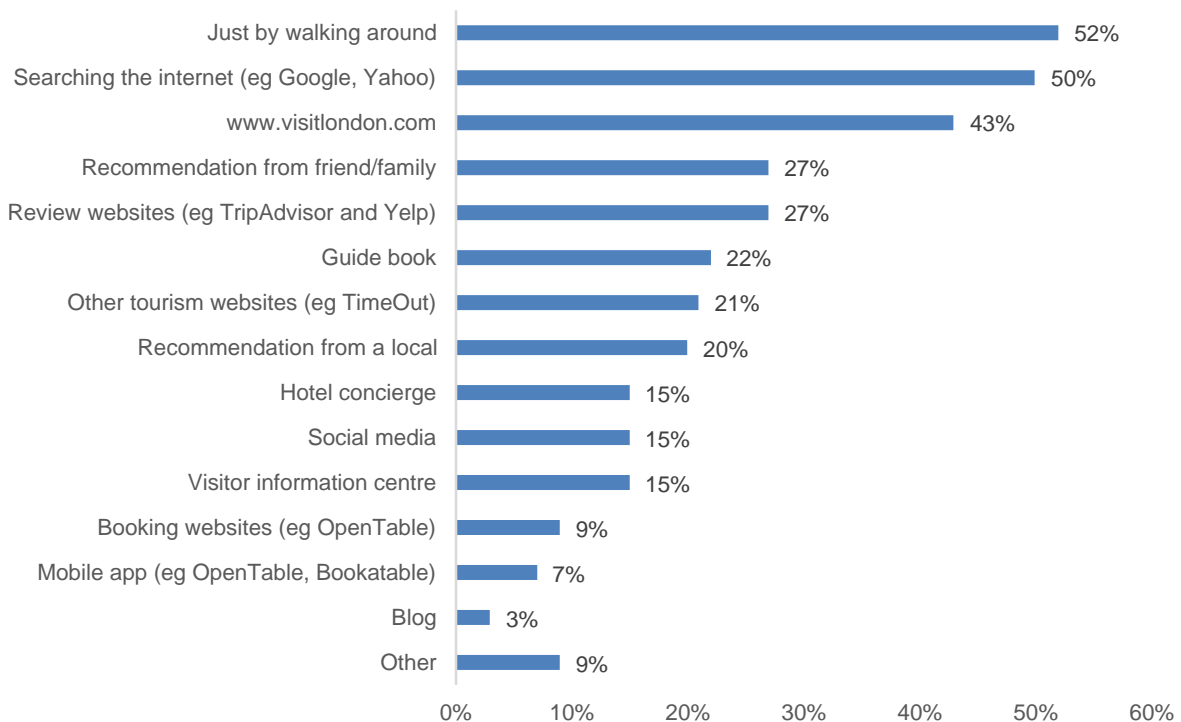
Figure 4.30: The experience of previous and potential London visitors of London nightlife, %



Source: London & Partners (2017), 'Visitor Voice London Nightlife Research'. The surveyed visitors were users of the London & Partners website, and mostly come from English speaking countries.

Visitors tend to find out what to do at night just by walking around (52%), or searching the internet (50%, although this rose to 64% amongst 18-34 year olds), Figure 4.31.

Figure 4.31: % of different channels used by visitors and potential visitors to discover London’s nightlife experience



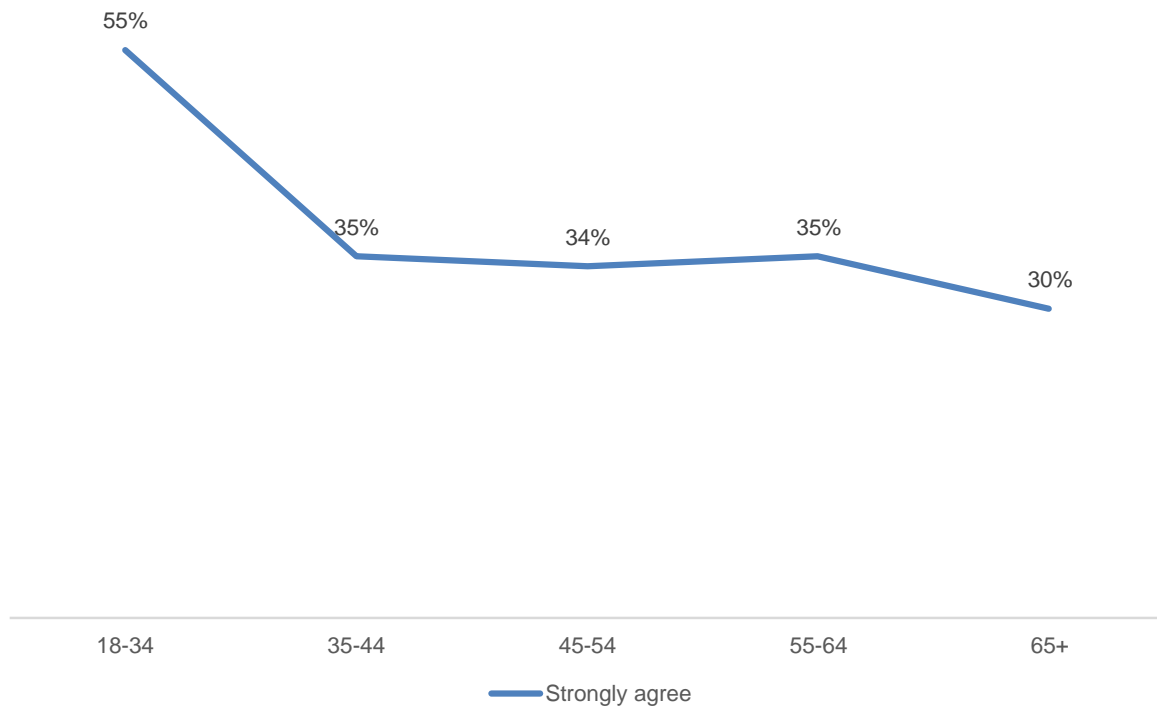
Source: London & Partners (2017), 'Visitor Voice London Nightlife Research'. The surveyed visitors were users of the London & Partners website, and mostly come from English speaking countries.

In terms of considering options on how to travel around London 47% of international visitors were unaware of the Night Tube at the time of the survey in September 2017, and around a year after the launch of the service.

Younger visitors are more likely to agree that London nightlife is great for people of my age, Figure 4.32:

- 49% of families with children agree that London’s nightlife offers plenty for them to do
- Over half of under 35s strongly agree that London nightlife is great for their age group, compared to 35% for 35-64 year olds, and less than a third for 65+ year olds:

Figure 4.32: Agreement with the statement “London nightlife is great for people of my age” by age group of London visitors and potential visitors



Source: London & Partners (2017), ‘Visitor Voice London Nightlife Research’. The surveyed visitors were users of the London & Partners website, and mostly come from English speaking countries.

Night time visitor activity is heavily concentrated in Central London, with East and particularly South London rarely visited by tourists, Table 4.2:

- 75% of visitors go to central areas (eg Soho, Oxford Street, and London Bridge)
- While 25% go to West London (eg Shepherd’s Bush, Ealing and Notting Hill)
- 11% go to East London (eg Shoreditch, Dalston, and Hoxton)
- And 9% go to South London (eg Clapham, Brixton and Peckham)

Table 4.2: Areas where various night time activities were experienced by London visitors

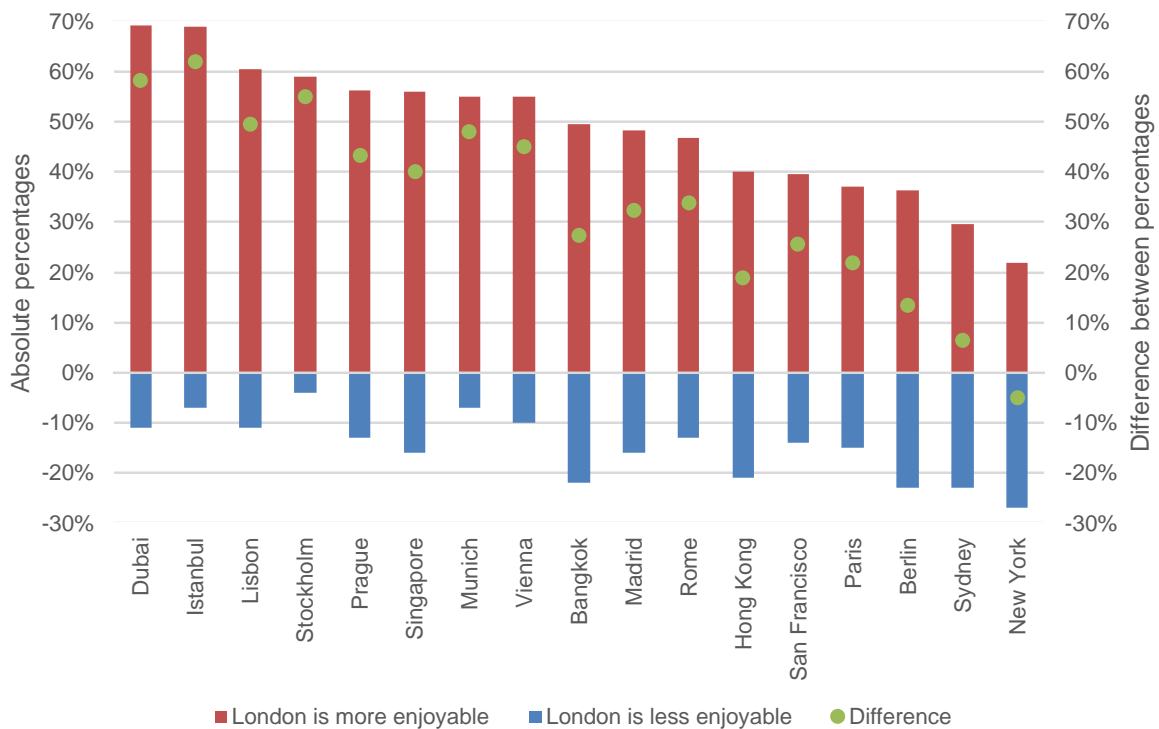
	Restaurants	Theatre	Museums	Live music	Pubs	Bars	Seasonal attractions/ events	Sightseeing	Shopping	Average
Central (e.g. Soho, Oxford Street, London Bridge)	80%	79%	84%	56%	75%	81%	82%	91%	87%	79%
West London (e.g. Shepherd’s Bush, Ealing, Notting Hill)	30%	19%	22%	19%	29%	25%	21%	27%	31%	25%
North London (e.g. Angel, Hampstead, King’s Cross)	20%	5%	20%	18%	22%	22%	17%	23%	19%	18%
East London (e.g. Shoreditch, Dalston, Hoxton)	10%	4%	9%	11%	13%	19%	11%	15%	11%	11%
South London (e.g. Clapham, Brixton, Peckham)	8%	1%	8%	9%	12%	15%	11%	11%	9%	9%

Source: London & Partners (2017), ‘Visitor Voice London Nightlife Research’. The surveyed visitors were users of the London & Partners website, and mostly come from English speaking countries.

London’s nightlife is comparable in its attractiveness for tourists to New York, Figure 4.33:

- 22% say London’s nightlife is more enjoyable, and 27% say New York’s is more enjoyable
- For all other cities mentioned in the survey there are more respondents who find London more enjoyable than less enjoyable
- Other cities that rate highly among tourists when compared with London include Hong Kong, Paris, Berlin and Sydney

Figure 4.33: Percentage of London visitors who agree/disagree that London’s nightlife is more/less enjoyable than other major cities for visitors



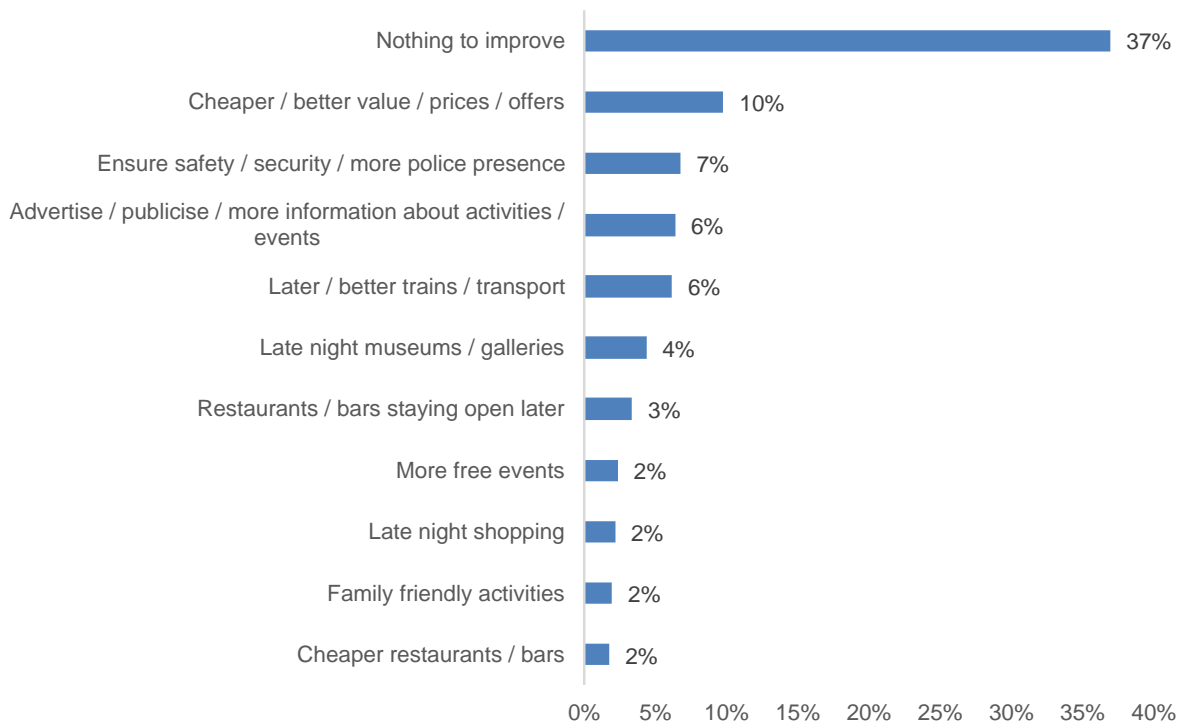
Source: London & Partners (2017), ‘Visitor Voice London Nightlife Research’. The surveyed visitors were users of the London & Partners website, and mostly come from English speaking countries.

The difference in the scores for whether London is more or less enjoyable provides a metric for the main competitor cities to London:

- New York (-5%, and so more respondents prefer New York to London)
- Sydney (+7%)
- Berlin (+13%)
- Hong Kong (+19%)
- Paris (+22%)

But almost two thirds of visitors suggested some opportunities to make London’s nightlife more appealing (e.g. value, safety, and info), Figure 4.34:

Figure 4.34: Spontaneous suggested improvements to London’s nightlife by London visitors



Source: London & Partners (2017), ‘Visitor Voice London Nightlife Research’

Notes: The surveyed visitors were users of the London & Partners website, and mostly come from English speaking countries.

Based on 500 open ended responses, and improvements suggested in less than 2% of comments not shown

London is the European leader in terms of numbers of bed nights (from paid accommodation), estimated at 75 million in 2017⁷⁰. This is less than the number of overnight stays because some people will be staying with family and friends⁷¹. Around 20% of international overnight visits are for business purposes, as are 25% of domestic overnight visits.

GLA Economics recently conducted some analysis of demand and supply for serviced visitor accommodation in London⁷². For convenience, some findings are summarised here. London’s supply of serviced accommodation, that is hotels, hostels, B&Bs, and guest houses, was 145,700 rooms in 2015. It is concentrated in central London with 111,700 rooms or 76.6% of all serviced accommodation located in central London local authorities⁷³, and 34,000 rooms or 23.4% of accommodation located in outer London, see Map 4.1. The share of serviced accommodation in outer London has increased from 15% in 1971. Around half the increase has occurred in Hounslow and Hillingdon, that is it may well be servicing Heathrow airport.

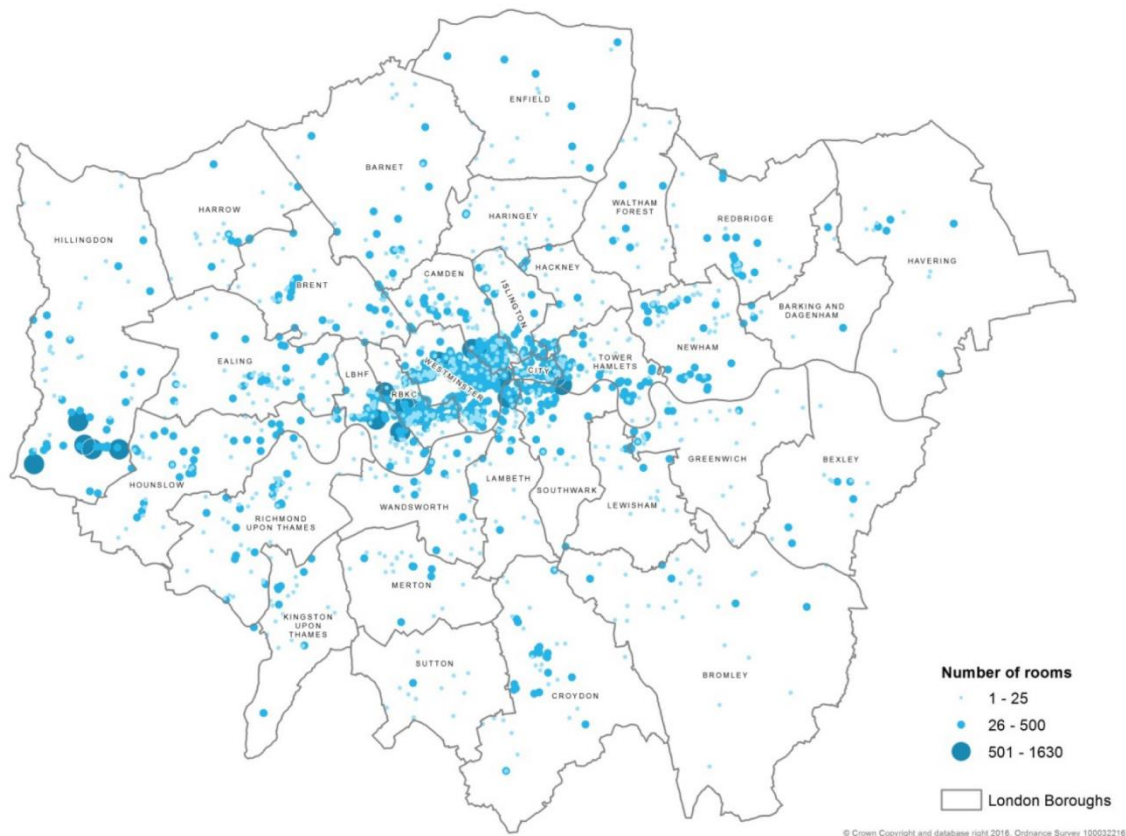
⁷⁰ See [ECM Benchmarking Report 2017 Executive Summary](#). Annex C provides more information from this report.

⁷¹ As the figures come from different surveys some of the variance may also be explained by differences in survey methodology.

⁷² See [Projections of demand and supply for visitor accommodation in London | London City Hall](#)

⁷³ In this report central London included Camden, City of London, Hackney, Islington, Kensington and Chelsea, Lambeth, Lewisham, Southwark, Tower Hamlets, Wandsworth, and Westminster

Map 4.1: Distribution of room supply by London local authority, December 2015



Source: AMPM Database, GLA Economics analysis

While international visitors tend to stay in the central areas of London this is reinforced by the available accommodation.

Demand for London accommodation is projected to reach 196.4 million nights by 2041 from 138.5 million visitor nights in 2015⁷⁴.

Finally, some day visitors to London may also be around after 6pm and engage in night time activities. In 2017, there were 327 million day visits to London by people who lived outside London and didn't come to London on a regular basis, and they spent £12.6 billion⁷⁵. 84 million of these visitors participated in cultural and leisure activities⁷⁶, and spend £3.2 billion. By both measures average spend in London is higher than for GB as a whole, and around 20% of GB expenditure is in London.

4.8 Development of the evidence base

Much of the information in this chapter is at an aggregate level. There are some significant limitations with existing data on what can be said at a more granular level on what people do at night and where. Cities across the world have similar issues, and this section considers ways to develop the evidence base, and what other cities are doing.

⁷⁴ See [Projections of demand and supply for visitor accommodation in London | London City Hall](#)

⁷⁵ See [GB Day Visits Survey: Latest results | VisitBritain](#)

⁷⁶ The GB Day Visits Survey labels this activities core to tourism

The data in this publication on what people do at night primarily comes from public sector datasets from the ONS. Only the LFS has a question which distinguishes day time from night time activity⁷⁷, in its case for labour market participation – see Chapter 3. This limits the depth of the analysis of night time activities.

Annex B considers the opportunities for new urban data to give a more complete picture of London's night time offer, such as anonymised card payment data. It identifies four potential uses:

- 1) *Patterns of consumption* – there is incomplete information on expenditure in London at night. This is linked to the value of output. Publicly available economic and business data is usually not time sensitive and there are challenges in attributing activity by time. Thus, economic analyses often rely on proxy measures, e.g. reflecting the share of night workers, which does not allow for more detailed geographic or sectoral analysis to be undertaken. Data from payment cards and/or app-based payment systems could offer localised insights into retail spending and consumption patterns – offering a more timely and in-depth picture of London's economy at night. This might also be valuable in evaluating the economic impact of specific policies or programmes aimed at promoting London as a 24-hour city.
- 2) *Population mapping* – a key barrier to understanding the pros and cons of different parts of London's economy at night is gaps in population/footfall data for the city's night time areas. Resident population data is unsuitable for contextualising data on the impacts of night time activity, since night time populations are different from day time populations. This can affect policy decisions and impact assessments – for example, the 'night time economy' is often linked to crime or other antisocial behaviour without a clear understanding of the population in the area for the relevant time period. New sources of (aggregated) location data – e.g. from mobile phones or travel networks – could be used to study population distribution by time; this could help to map night time areas and travel patterns and potentially help to standardise crime/health statistics.
- 3) *London's night time demographic* – the Mayor of London is committed to widening access to ensure all Londoners can participate in the city's night time offer. But, while official statistics and GLA survey data provides some evidence on London's night time workers and users, there are gaps in our understanding of who does and does not access different services at night more broadly. Anonymised data from social networks or payments cards could be used to indicate who does (and does not) participate in activities in London at night, when and where. There may be further scope for projects or relevant late-night venues (e.g. museums and galleries) to collect data from night time visitors in order to track levels and profile of visitation and inform programmes accordingly.
- 4) *Patterns of night time activity* – there is limited data on travel patterns at night, where people go at night, and changes over time. TfL has good data on travel patterns on public transport, but data on bus and tram destinations is incomplete. There is no other publicly available data on journeys, or footfalls in areas. Similarly, there is data on trends in workplaces, where people are more likely to work at night, and their numbers of employees although actual numbers of night time workers are not known. It would be helpful for planning purposes to have more definitive information on trends in where people are at night.

Further, an estimate of night time output, that is the economic value of economic activities, has not been produced because a significant proportion of workers in the night time category are

⁷⁷ The Crime Survey for England and Wales also asks if a crime occurred during the day or night.

shift workers and work both during the day and night. It is not known what proportion of their work is at night.

In cities across the world there is an interest in improving the night time offer. Annex C reviews the available international evidence. Despite a shared interest in the promotion of night time activity there is little evidence of systematic evidence gathering through monitoring and evaluation to improve understanding of what works. There are, though, various developments:

- 19 cities across the world have an independent body to represent night time industries; a Night Czar or Night Time Mayor; or night time offices within government
- Other initiatives to develop the evidence base
 - San Francisco has a Late Night Transportation Working Group, which has survey late night and early morning transportation to, from, and within San Francisco, and made 15 recommendations for improvements
 - Berlin has audited and mapped its music venues
 - London is developing a Cultural Infrastructure Map
- The only city with a clear and public long-term strategy for management of its night time economy is Sydney

5 London's night time industries

5.1 Introduction

Chapter 3 demonstrated that there were night time workers in all the sectors of the London economy. It also identified that there were certain industries, defined at Annex A, which had above average employment of workers at night. This chapter provides more information on the contribution of these industries to London in terms of employment and workplaces, with a focus on night time Cultural and leisure activities. As people work at night across all industries it is inevitable that a classification of night time industries includes day time workers, and so the figures in this chapter are on a different basis to those for night time workers in Chapter 3.

This chapter looks at trends in employment and the number of workplaces in London, employment trends by local authority, and the spatial distribution of workplaces at the lower level geography of mid-super-output-area (MSOA)⁷⁸. Chapter 6 takes this analysis further and considers trends in some specific categories of venue amongst Cultural and leisure activities.

As a recap, the night time industries⁷⁹ are:

- Cultural and leisure activities
 - Such as hotels, restaurants, pubs, creative, arts, and entertainment activities, sports activity, and private security industries
- Activities which support night time cultural and leisure activities
 - Such as retail sales in non-specialised stores, passenger transport industries
- 24-hour health and personal services
 - Such as hospital and residential care activities
- Activities which support wider social and economic activities
 - Such as certain manufacturing, and warehousing industries, books, motion pictures and music publishing industries

5.2 Main findings

The night time industries in London are an important part of the London economy, are a significant part of the night time industries in the UK, and are becoming of increasing importance both in London and nationally

- London night time industries had 1.6m employee jobs in 2017, and account for 33% of employee jobs in London, and 16% of UK employee jobs in night time industries
- Between 2001 and 2017 the growth in employee jobs in night time industries in London, was 2.2% a year. This was faster than growth for UK night time industries, 1.7% a year, and the London economy as a whole, 2.0% a year
- Cultural and leisure activities is the category with most employee jobs, at 594,000 in 2017, or 37% of jobs in London night time industries
- London employee job numbers have been rising at a faster rate between 2001 and 2017 than the UK-wide numbers for the night time industry categories of Cultural and leisure activities, Activities which support night time cultural and leisure activities, and 24-hour health and personal social services. This is not the case for Activities which support wider social and economic activities

⁷⁸ The data for the analysis of this chapter comes from the ONS Inter-Departmental Business Register (IDBR), and can be found in its entirety at [The Night Time Economy in London and Manchester, 2001 to 2017 - Office for National Statistics](#)

⁷⁹ Section 3.5 provides a fuller explanation of the night time category of industries and occupations

Jobs in the night time industries are distributed across London, and have been growing in all areas of London

- All London local authorities (except Croydon) have seen growth in employee jobs in night time industries, and the four categories, over the period 2001 to 2017
- Across the categories of night time industries there is a distribution of workplaces across London, although there is a pronounced concentration of workplaces in Cultural and leisure activities in the centre, and around Heathrow airport. It is likely that around the airport that it is hotels and restaurants which predominate amongst Cultural and leisure activities, while the centre will have more arts, entertainment and recreation activities
- At a local authority level
 - Westminster accounts for 19% of employee jobs in London, and 13% of workplaces
 - Camden accounts for the next largest shares of 7% of employee jobs, and 7% of workplaces
- The town centres with the largest floorspace for night time Cultural and leisure activities are distributed around London, and there has been growth in retail and leisure floorspace across all classifications of town centre between 2012 and 2016

While there has been growth in Cultural and leisure activities across London, there is a marked concentration in the West End, and some areas may have comparatively little availability of certain types of venue

- ‘Night time economy’ floorspace is greatest by some margin in the international town centres, and particularly in the West End, followed by metropolitan and major town centres
 - Average night time economy floorspace in international centres is over three times higher than that for metropolitan centres, which in turn is over 50% higher than for major town centres
 - Night time economy floorspace in the West End is near four times higher than that for the town centre with the next highest such floorspace, Shepherds Bush
- Town centres vary in their night time offer, although some may be under-represented in venues such as cinemas and theatres.

5.3 Employment in London’s night time industries

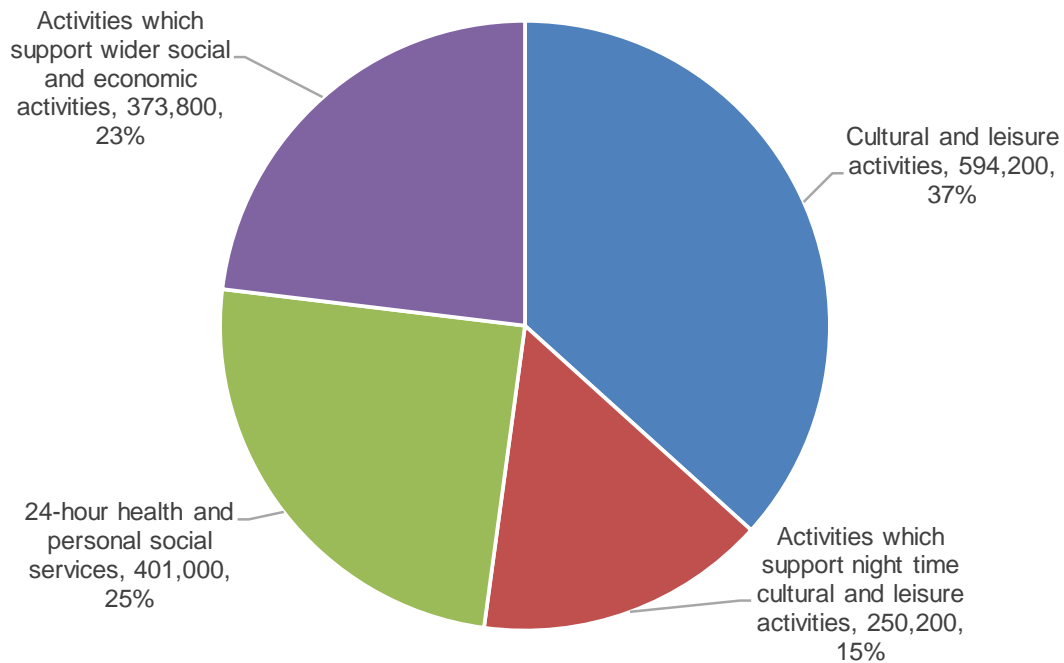
This section provides information on employee job numbers in the night time industries. This is all employees who work in these industries, and so it will include people who work during the day as well as those who work at night. The analysis of Chapter 3 reported that there was a comparatively high incidence of shift-time working in these industries, and so there are people who work both during the day and at night as part of their working patterns.

London’s night time industries are an important source of employment. They accounted for around 1.6 million employee jobs in 2017, equal to a third (33%) of all employees in the capital⁸⁰ (compared to 22% of workplaces, see later). As Figure 5.1 shows, Cultural and leisure

⁸⁰ This is different from the proportion of workers who are night time workers, as it covers only some workers namely employees and not the self-employed, covers some industries and not the whole economy, includes people who work during the day and not just night time workers, and uses a different data source to the calculation of night time workers, namely IDBR rather than LFS.

industries is the largest category, with 594,200 employee jobs or 37% of the night time industries total. The next largest category is 24-hour health and personal social services (401,000 jobs). This category made-up 25% of employee jobs in night time industries from just 11% of workplaces – indicating that workplaces are, on average, relatively large in this category.⁸¹ This is followed by Activities which support wider social and economic activities (373,800; 23%); and Activities which support night time cultural and leisure activities (250,200; 15%).

Figure 5.1: Employee jobs in night time industries in London, 2017



Source: IDBR

Over the period 2001 to 2017 the number of employee jobs in night time industries has increased, rising by 471,200 or 41%. The average annual rate of growth was 2.2% during this time, slightly above the average for all sectors of the London economy (2.0% per year). This is also faster than for all jobs in the UK in night time industries, and the London share has risen from 15% to 16% between 2001 and 2017.

As Table 5.1 shows, as well as a higher starting point, the strongest employee jobs growth in both absolute and relative terms was in Cultural and leisure activities. This category saw employee jobs rise by 233,100 or 3.2% per year on average since 2001. The next highest growth was in 24-hour health and personal social services (+116,900 or 2.2% per year). Conversely, both Activities which support night time cultural and leisure activities and Activities which support wider social and economic activities saw lower-than-average employee jobs growth since 2001.

⁸¹ Large in employment terms. This may be unsurprising since this category includes, for example, '86.1 Hospital activities'.

Table 5.1: Number of employee jobs in night time industries, London, 2001-2017

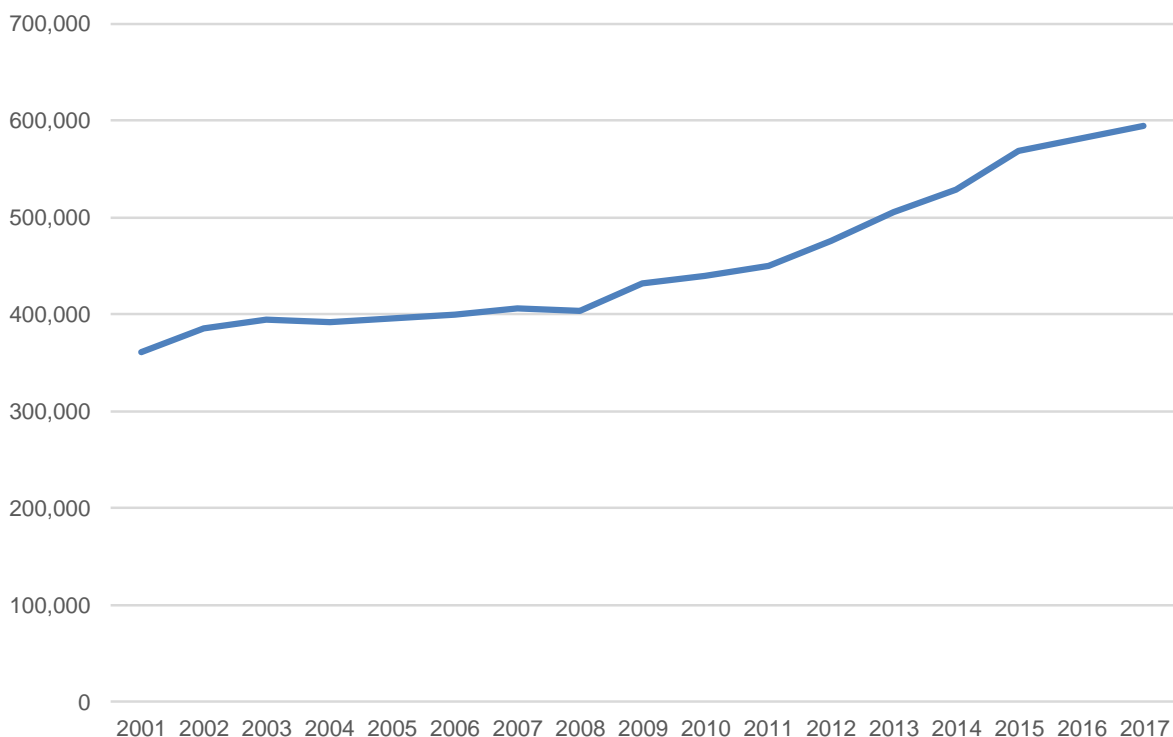
Industry	2001	2009	2017	Change in jobs 2001-17	
				Number	Average annual growth
Cultural and leisure activities	361,100	431,500	594,200	233,100	3.2%
Activities which support night-time cultural and leisure activities	192,300	207,900	250,200	57,900	1.7%
24-hour health and personal social services	284,100	331,200	401,000	116,900	2.2%
Activities which support wider social and economic activities	310,500	343,100	373,800	63,300	1.2%
All London Night-time industries	1,148,000	1,313,600	1,619,200	471,200	2.2%
All UK Night-time industries	7,814,000	8,918,500	10,265,900	2,451,900	1.7%
Total in all London sectors	3,625,100	4,099,500	4,976,000	1,350,900	2.0%

Source: IDBR

Annual employee jobs growth rate between 2001 and 2017 has also been faster in London than the UK for each of the categories of night time industries, with the exception of Activities which support wider social and economic activities⁸².

Figure 5.2 looks more closely at the change in employee jobs in Cultural and leisure activities over the period from 2001 to 2017. As with workplace trends, it is clear that growth has accelerated in more recent years. From 2012-2017, for example, the average annual rate of growth was 4.5% per year, compared to just 2.3% per year from 2001-2009. Employee jobs growth also accelerated across London between the two periods, rising from 1.5% per year for 2001-2009 to 3.2% per year for 2012-2017.

Figure 5.2: Cultural and leisure activities employee jobs in London, 2001-2017

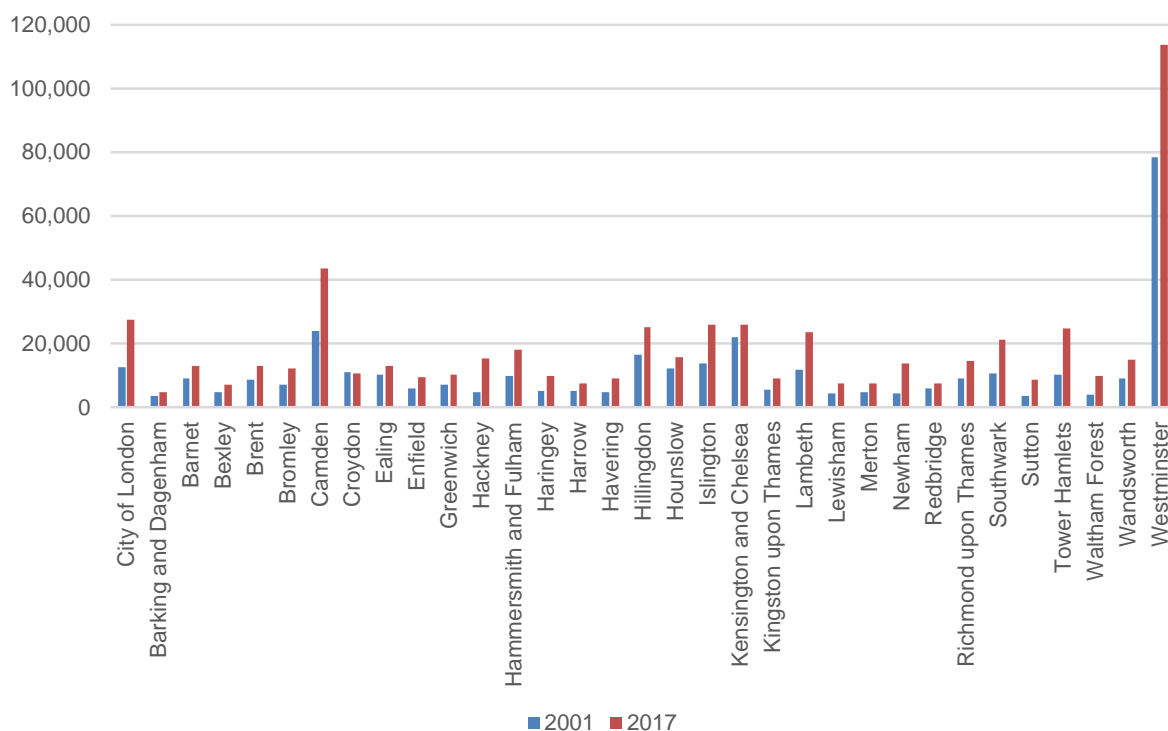


Source: IDBR

⁸² Where the annual growth rate was 1.3% for the UK and 1.2% for London

Figure 5.3 sets out the number of employee jobs in Cultural and leisure activities for London local authorities in 2001 and 2017. While boroughs saw an increase in Cultural and leisure activities jobs between 2001 and 2017 – Croydon being the only exception (-400) – there are still considerable differences between boroughs. In absolute terms, Westminster (+35,200) saw the highest level of employee jobs growth over this period, followed by Camden (+19,600) and City of London (+14,900). Although the highest rates of employee growth were recorded in Hackney and Newham (+221% and +209% respectively), employee jobs in Cultural and leisure activities appear to be more concentrated than workplaces – with Westminster accounting for almost a fifth (19%) of London’s employee jobs in this category. Camden has the next highest share at 7%.

Figure 5.3: Cultural and leisure activities employee jobs, London local authorities, 2001 and 2017



Source: IDBR

More broadly, there has been a growth in employee jobs in night time industries for all London local authorities between 2001 and 2017, and for almost all local authorities there has been a growth in employee jobs for each of the four sub-categories. Croydon is the only local authority which has not seen an increase in all employee jobs over this period.

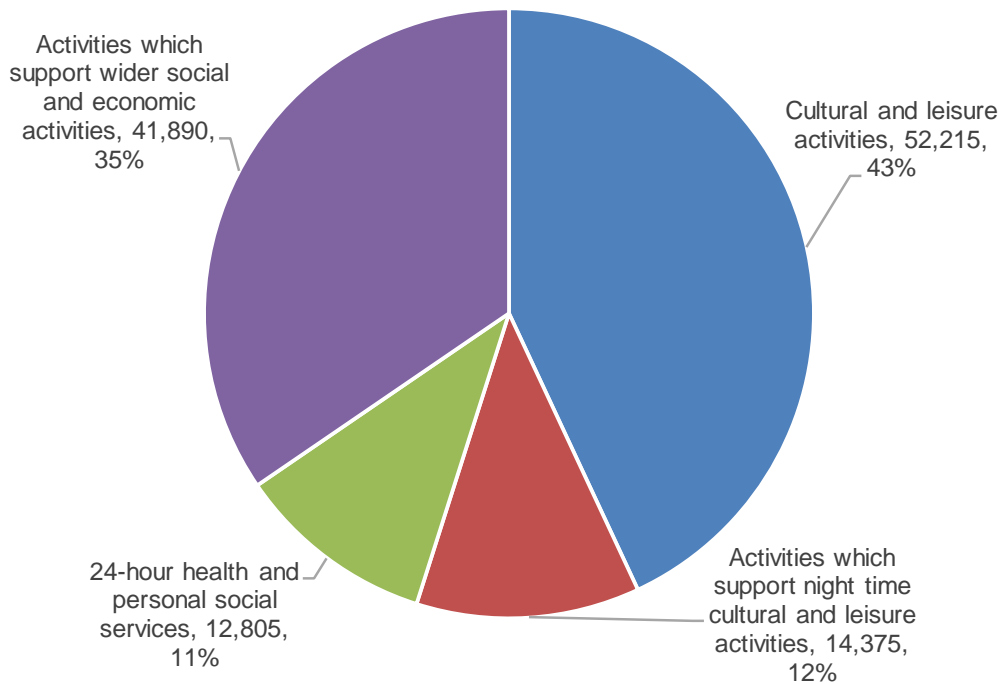
5.4 Number of workplaces in London’s night time industries

There were approximately 121,285 workplaces in London’s night time industries in 2017, Figure 5.4. Cultural and leisure activities is the largest single category, with 52,215 workplaces in London. This category is the one which aligns most closely with most other definitions of the night time economy⁸³ and accounts for some 43% of all workplaces in our night time industry grouping (Figure 5.4). The next largest category is Activities which support wider social and economic activities (41,890 workplaces or 35% of the total); followed by Activities which

⁸³ For example, see: GLA (2017) [Culture and the night-time economy SPC](#)

support night time cultural and leisure activities (14,375; 12%) and 24-hour health and personal social services (12,805; 11%).

Figure 5.4: Workplaces in night time industries in London, 2017, numbers and percentage of total



Source: IDBR

Over the period 2001 to 2017 night time industries have accounted for around a fifth (22%) of all workplaces in the capital (compared to one third of employee jobs, see earlier). The number of workplaces has increased, rising by 39,045 or 47%. The average annual rate of growth was 2.5% during this time, which is below that for all sectors of the London economy (2.8% per year). This is also somewhat faster than for all workplaces in the UK in night time industries, and the London share has risen from 13% to 16% between 2001 and 2017.

As Table 5.2 shows, while the number of workplaces for Cultural and leisure activities is higher than for other categories of night time industries, the rate of growth between 2001 and 2017 has been lower than for the other three categories. Cultural and leisure activities rose by 9,010 or 1.2% per year on average since 2001. The highest growth rate was in 24-hour health and personal social services (+7,575, or 5.8% per year), and highest absolute growth was in Activities which support wider social and economic activities (+17,695, or 3.5% per year).

Table 5.2: Number of workplaces in night time industries, London, 2001-2017

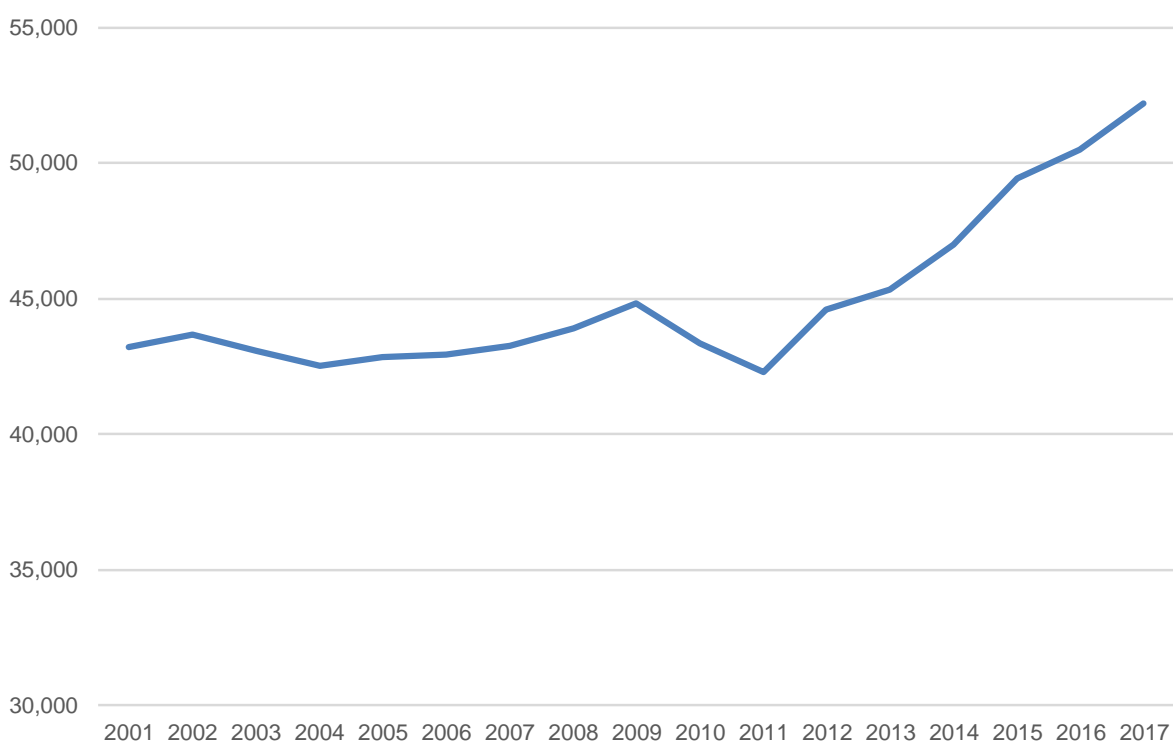
Industry	2001	2009	2017	Change in workplaces 2001-17	
				Number	Average annual growth
Cultural and leisure activities	43,205	44,835	52,215	9,010	1.2%
Activities which support night-time cultural and leisure activities	9,610	11,260	14,375	4,765	2.5%
24-hour health and personal social services	5,230	7,365	12,805	7,575	5.8%
Activities which support wider social and economic activities	24,195	27,705	41,890	17,695	3.5%
All London Night-time industries	82,240	91,165	121,285	39,045	2.5%
All UK Night-time industries	627,385	665,060	777,880	150,495	1.4%
Total in all London sectors	366,305	395,315	561,070	194,765	2.7%

Source: IDBR

It is also the case that the annual growth rate 2001-17 in the number of workplaces in night time industries has been faster in London than the UK, and for each of the sub-categories of night time industries. Across sub-categories, London has an above average share of Cultural and leisure activity workplaces and a lower share of the UK's wider support activities. This reflects the fact that London's economy is more specialised in services, including Arts and entertainment, than in land-intensive activities, like Manufacturing or Wholesale activities.⁸⁴

As noted already, Cultural and leisure activities are a particularly important category of night time industries. As Figure 5.5 shows, there was a marked change in the trend in the number of workplaces in more recent years. The average annual growth rate rose to 3.2% per year from 2012 to 2017, with the highest level of growth in 2015 when the number of workplaces rose by 2,435.

Figure 5.5: Cultural and leisure activities workplaces in London, 2001-2017



Source: IDBR

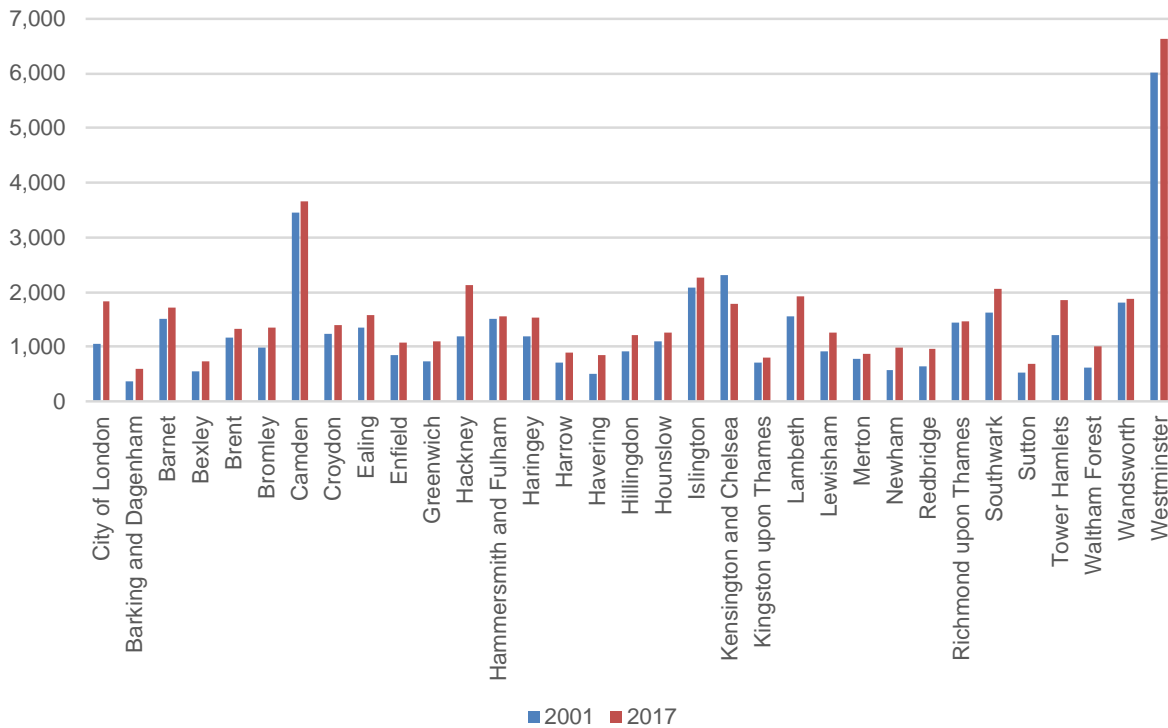
Looking in more detail, Figure 5.6 shows how the number of Cultural and leisure activities workplaces has changed in London boroughs and the City of London from 2001 to 2017. Clearly there is considerable variation in the number and growth of culture and leisure workplaces at a sub-London level. Only one borough, Kensington and Chelsea (-525), saw a net fall in workplaces over the sixteen years to 2017. Between 2001 and 2017 Hackney (+945) had the highest level of growth, followed by City of London (+780) and Tower Hamlets (+650).⁸⁵ Westminster saw only the fourth highest level of growth during this period (+625) but still accounted for 13% of London's Cultural and leisure activities workplaces in 2017 (14% in

⁸⁴ GLA Economics (2016) [Economic Evidence Base for London 2016](#)

⁸⁵ Hackney also had the highest rate of growth in gross disposable household income (GDHI) per head in London over the period from 2001-2015, which may have been a contributory factor. However, there does not appear to be a very clear link between the level or growth in GDHI in London boroughs and the change in Cultural and leisure activities workplaces overall.

2001). Camden had the second highest number of workplaces overall, making up 7% of workplaces in 2017.⁸⁶

Figure 5.6: Cultural and leisure activities workplaces, London boroughs, 2001 and 2017



Source: IDBR

More broadly, there has been a growth in workplaces in night time industries for all London local authorities between 2001 and 2017, except, again, Kensington and Chelsea. Across each of the other categories of night time industries, other than Cultural and leisure activities, there has been a growth in workplaces for all local authorities in London.

5.5 Spatial analysis of night time industry workplaces

A benefit of defining night time industries is the ability to carry out more detailed spatial analysis of economic activity at a sub-London level. Indeed, looking closely at the geography of London’s night time industries by MSOA shows distinct spatial trends between night time industry categories.

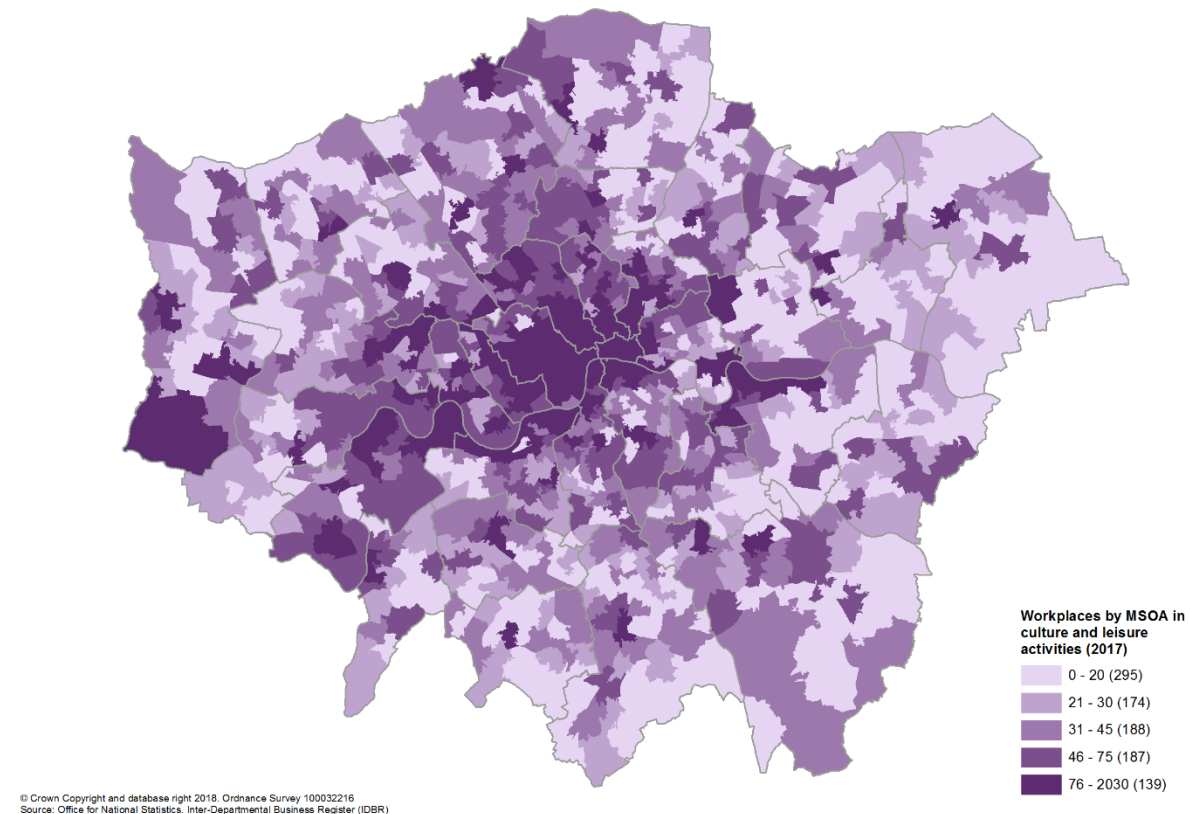
Map 5.1 sets out the number of Cultural and leisure activities workplaces by MSOA in 2017. In-line with the findings at a borough level, it shows that London’s Cultural and leisure activities workplaces are (overall) relatively concentrated in central London (and around Heathrow airport). There are a higher number of these workplaces in the centre of the city – as indicated by the darker shaded areas – including in internationally significant night time areas like Charing Cross Road, Tottenham Court Road, and the West End.⁸⁷ There are also many parts of London with a far lower number of Cultural and leisure activities workspaces – these tend to be in outer London and often outside of town centres. This is consistent with the Draft New London Plan,

⁸⁶ This compares to an average across all boroughs of 3% of Cultural and leisure activities workplaces.

⁸⁷ Mayor of London (2017) [Culture & the Night-Time Economy Supplementary Planning Guidance \(SPG\)](#)

which states that: ‘24-hour activities are not suitable for every part of London and its residents, and boroughs should balance the needs of local residents with the economic benefits of promoting a night time economy’.⁸⁸

Map 5.1: London’s Cultural and leisure activities workplaces, by MSOA, 2017



Source: IDBR

Certainly, London’s town centres have their own character and their night time offers serve different functions. Areas of central London, for example, have a particularly high density of internationally-renowned cultural activities in the evening and night. These attract national and international tourists, as well as Londoners. To illustrate this point: data collected for the London Plan Town Centre Health Check 2017⁸⁹ shows that the West End accounted for 12% of the ‘hotels’ floorspace in the capital’s town centres in 2016, 25% for ‘art gallery/museums’, and 35% for ‘theatres’⁹⁰. At the same time, it accounted for only 4% of the ‘public houses’ floorspace in London’s town centres and 3% for ‘cinemas’ in 2016.

There is a clear disparity in the average provision of ‘night time economy’ floorspace by type of town centre, Figure 5.7. Floorspace is the greatest by some margin in international town centres, and particularly in the West End, followed by metropolitan and major town centres. This supports the conclusion of Annex C that while London is a global leader in its attractiveness

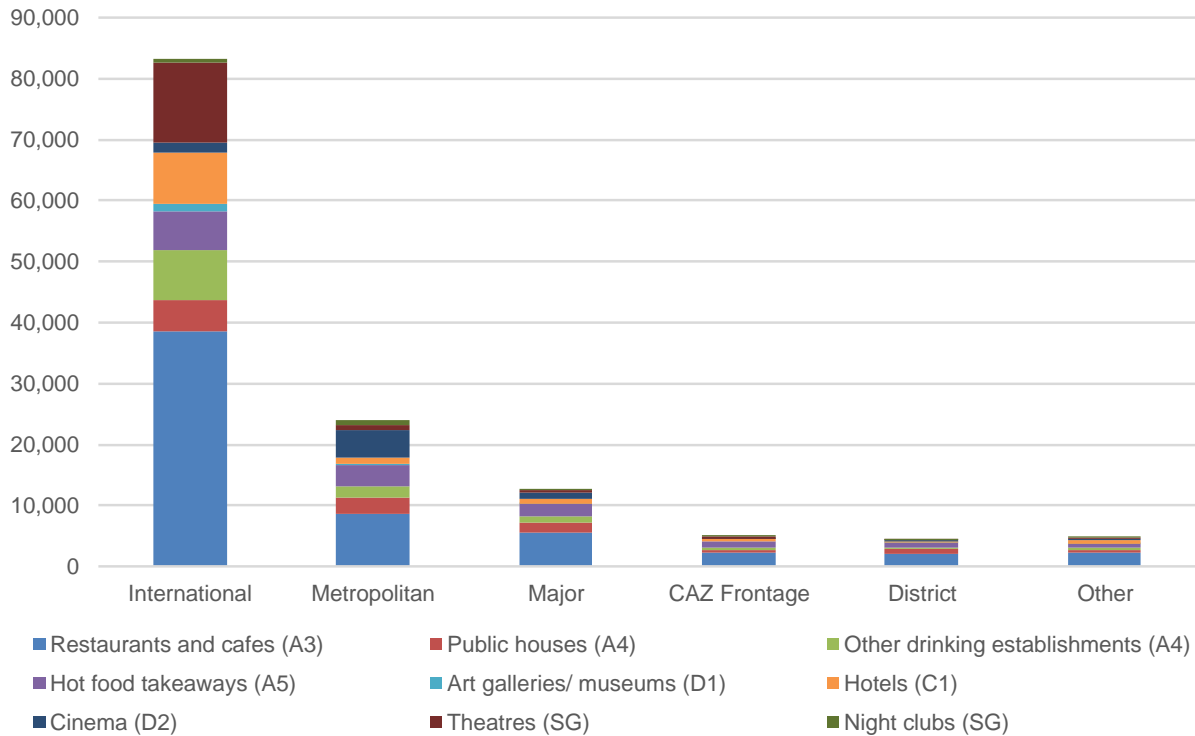
⁸⁸ Mayor of London (2018) Draft New London Plan

⁸⁹ See Greater London Authority (2018) [London Plan Town Centre Health Check 2017](#) and [London Datastore](#). This explains the Town Centre Network Classification, and characterisation of floorspace used in this section

⁹⁰ Greater London Authority (2018) [London Plan Town Centre Health Check 2017](#)

to overseas visitors, night time cultural and leisure provision relative to resident population size is less developed than for other cities.

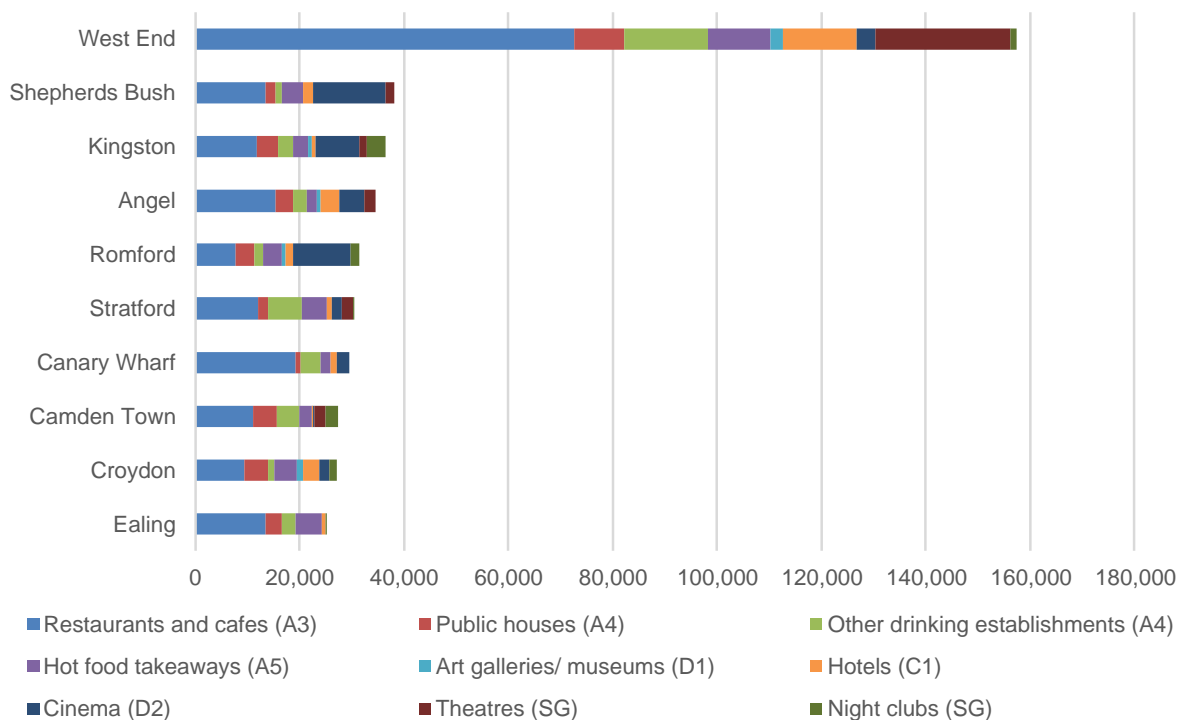
Figure 5.7: Average night time economy floorspace in town centres by classification, 2016, sq metres



Source: London Plan Town Centre Health Check 2017

More broadly the London town centres with the largest 'night time economy' floorspace are relatively dispersed across different parts of the capital with representation for the west in Ealing, Shepherd's Bush and Kingston, the east in Canary Wharf, Romford and Stratford, the south in Croydon, and the north in Angel and Camden Town, as well, of course, as the West End, Figure 5.8.

Figure 5.8: London’s ten largest town centres by selected ‘night time economy’ floorspace 2016, sq metres



Source: London Plan Town Centre Health Check 2017

These town centres are important to night time activities for different reasons. For example, Shepherds Bush has the highest level of ‘cinema’ floorspace in the capital, while Kingston has the highest level of ‘night-club’ floorspace. There are, though, signs that certain uses – including cinemas and theatres – tend to be under-represented in some of London’s town centres (particularly in Strategic Areas for Regeneration), with other non-retail uses being relatively over-represented (e.g. hot food takeaways, pay-day loan shops, betting shops).⁹¹

Annex C reviews international evidence on the night time offer, and supports this conclusion. Across global cities London has a consistently high ranking in the provision of cultural venues and performances. But its resident population is less well served when allowing for the size of London’s population, and recorded satisfaction with its cultural facilities.

The findings from the London Plan Town Centre Health Check suggest that the development of night time activities has an important bearing on the evolution of town centres:

- There were positive average gains in retail and leisure floorspace across all classifications of town centre over the period April 2012 to March 2016, mostly associated with the International, Metropolitan and Major centres. In contrast, there were significant losses of offices (-82,000 sqm in total) across all centre classifications on average except the Central Activities Zone (CAZ) Frontages
- There is some evidence of town centres diversifying in their uses of space, in particular in Major and District centres with growth in the proportion of restaurants, pubs, nightclubs and takeaways over the period 2007 to 2016

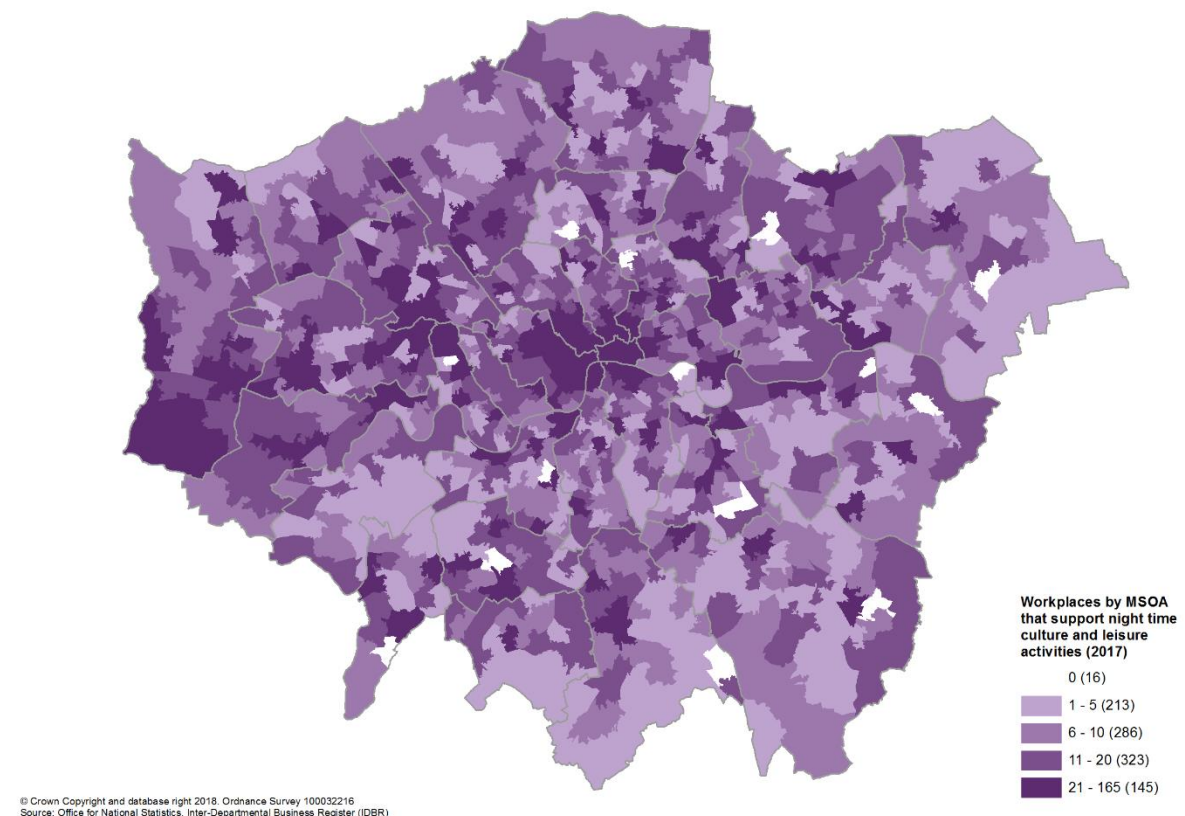
⁹¹ Greater London Authority (2018) [London Plan Town Centre Health Check 2017](#)

- The health centre check suggests that town centre demand – and related growth – is polarising, with selected larger centres growing at a greater pace than smaller centres

Turning to other parts of the night time industries, other categories also have different spatial distributions across London reflecting the nature of these activities.

Map 5.2 shows the distributions of workplaces in Activities which support night time cultural and leisure activities. These firms – which provide activities like retail and urban transport – are relatively dispersed across different parts of the capital.

Map 5.2: London’s workplaces which support night time Cultural & leisure activities, by MSOA, 2017



Source: IDBR

Map 5.3 sets out the distribution of firms in 24-hour personal health and social services. While there is still some clustering of activity in the centre of the city (reflecting the location of some major hospitals), the distribution of these workplaces is far more spread out across inner and outer London, as might be expected to meet the needs of the widely distributed resident population of London.

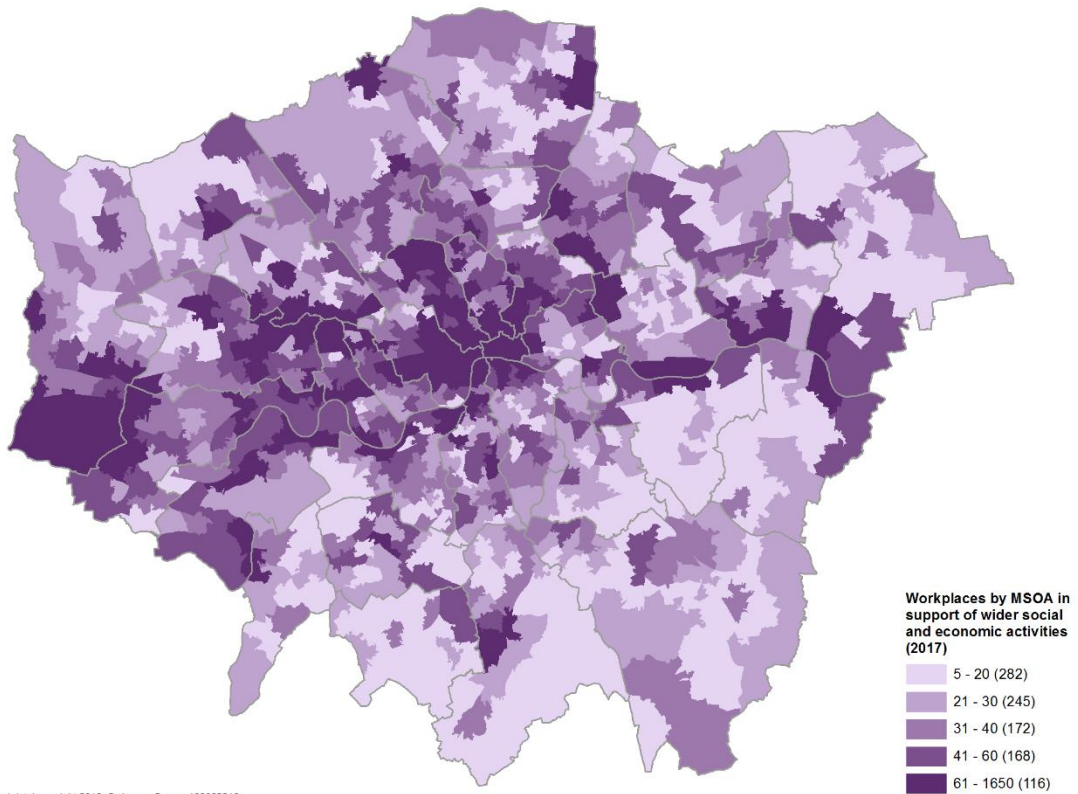
Map 5.3: London's 24-hour personal and social services workplaces, by MSOA, 2017



Source: IDBR

Conversely, Map 5.4 shows that firms with Activities which support wider social and economic activities are more concentrated in swathes of Central and West London (e.g. Acton and Heathrow), as well as some parts of East London (e.g. parts of Newham and Barking and Dagenham). This is likely to reflect the prominence of Manufacturing and Distribution activities in this category.

Map 5.4: London's workplaces with Activities which support wider social & economic activities, by MSOA, 2017



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Source: Office for National Statistics, Inter-Departmental Business Register (IDBR)

Source: IDBR

6 London's night time cultural venues

6.1 Introduction

The previous chapter found that Cultural and leisure activities was the largest and fastest growing of London's night time activities in terms of employee jobs. This chapter considers some of the developments behind the trends to provide more of a sense of how Cultural and leisure activities⁹² have evolved in London.

6.2 Main findings

The offer of Cultural and leisure activities has become more extensive across London, and more diverse with an expansion of the food-led offer, and more low/no alcohol provision

- For London as a whole expansion in the number of licensed restaurants has more than offset the decline in the number of pubs. There has, though, been growth in the number of pubs with ten or more employees, which may indicate that some pubs have expanded through providing a food offer
 - In 2017 there were 7,990 licensed restaurants an increase of 2,535 since 2001
 - In 2017 there were 3,530 pubs a decrease of 1,305 since 2001
 - In 2017 there were 1,850 pubs with 10 or more employees, a rise of 405 since 2001
- There is also diversification of the offer through growth in unlicensed restaurants and cafes
 - In 2017 there were 5,785 unlicensed restaurants and cafes an increase of 3,505 since 2001
- There is evidence to suggest that an increased density of licensed restaurants is associated with reduced rates of hospitalisation, and lower rates of violence and drink-driving

There has been a loss of some cultural provision, and not all London local authorities have benefited equally from increased diversity

- There has been a loss of pubs, grassroots music venues (GMVs), LGBTQ+ venues, and night clubs
 - In 2016 there were 94 GMVs down from 144 in 2007
 - In 2017 there were 53 LGBTQ+ venues down from 125 in 2006
 - In 2017 there were 570 clubs⁹³ down from 880 in 2001
- There are policy concerns around the loss of LGBTQ+ and grassroots music venues, and certain pubs that play an important community function
- The numbers of LGBTQ+ and grassroots music venues may have stabilised in the last year
- There has also been growth in takeaway food shops. There is some evidence that these shops can act as a flashpoint for violence at night⁹⁴
 - In 2017 there were 5,300 takeaway food shops an increase of 1,330 since 2001

⁹² This Chapter uses the industries definition of Cultural and leisure activities developed in Annex A

⁹³ ONS definition

⁹⁴ See, for example, [Working Paper 55: Alcohol consumption in the night-time economy | London City Hall](#), and Chapter 8 of this paper

The number of premises licenses has been growing slowly, requests for extensions tend to be for up to an hour, and the number of reviews of premises is low and declining

- There were 31,670 premises licenses in London at March 2017, up by 1,460 since the year to March 2013
 - Around half were for consumption on premises, e.g. restaurants and pubs, and half of these could also sell off premises, e.g. off-licenses
 - There were 1,040 24-hour licenses, of which 66% were for supermarkets or bars, and 7% were for pubs, public bars or nightclubs
- Most requests for license extensions are moderate increases (30–60 minutes)
- There were 180 reviews of premises in the year to March 2017, down from 220 in the year to March 2012

6.3 London's cultural infrastructure

London's cultural infrastructure encompasses a vast range of activities and venues which are of local, national and even international significance. While the data in the previous section showed an increase in Cultural and leisure activities workplaces *in general*, there are significant concerns about the rate of loss of *specific* types of evening and night time cultural venues in the capital. With access to consistent data a barrier to understanding detailed trends, several bespoke research studies have been carried out in recent years. Some of the key findings are summarised as follows:

- **Pubs:** Pub numbers in London overall fell by 27% between 2001 and 2017, from 4,835 to 3,530. All boroughs apart from Hackney and Bexley saw a decline in pub numbers over this period.⁹⁵ Employment in pubs fell between 2001 and 2010, but increased substantially thereafter – linked to an increase in the size of pubs in terms of employee numbers.⁹⁶ Several factors are likely to have contributed to the change in pub numbers: as well as business rates and the relaxation of permitted development rights in 2015 to support residential developments, this is likely to include changes in drinking patterns and preferences, as well changes in demand due to demographic compositional change.⁹⁷
- **Grassroots Music Venues:** there were 94 GMVs in London in 2016. This was down from 144 in 2007 – a net loss of 35%.⁹⁸ These venues are estimated to account for £91.8m in GVA, over 2,200 full time equivalent jobs and tax revenue of £44.6m. But, according to analysis undertaken by Nordicity, 21 of London's GMVs are at high risk of closure due to business rates revaluations.⁹⁹ There is also a risk that financial pressures will force GMVs to focus more on more commercial acts, at the expense of emerging artists.
- **LGBTQ+ venues:** looking at the period from 2006 to 2017, research by the UCL Urban Data Laboratory identified 162 LGBTQ+ venues in London altogether. This reached a peak of 125 venues operating in 2006, and a low of 53 venues operating in 2017. Over the period of study there were 106 venues closures recorded and a net loss of 58% of venues overall. Particularly at risk were longstanding venues and those catering to women and Black, Asian

⁹⁵ GLA Economics (2017) [Closing time: London's public houses. Current Issues Note 53.](#)

⁹⁶ The number of small pubs (i.e. those with fewer than 10 staff) in London has fallen by half (50%) since 2001, a decrease of 1,710 from 3,390. By comparison, the number of pubs with 10 staff or more has increased by 28% over this period (an increase of 405 from 1,445). All the increase in the number of large pubs has happened since 2011.

⁹⁷ For a discussion of this factor, see, for example: Carl, N. (2017) [Why Has London Lost so Many Pubs?](#)

⁹⁸ GLA (2017) [Rescue Plan for London's Grassroots Music Venues: Making Progress](#)

⁹⁹ Nordicity (2017) [Analysis of the impact of business rates revaluation on grassroots music venues in London](#)

and minority ethnic groups. There are often multiple factors involved in venue closures, with some venues re-designating as non-LGBTQ+ specific venues and others affected by development activity.¹⁰⁰

- **Night Clubs:** analysis of listings data by Nesta¹⁰¹ indicates an increase in night club closures in London in recent years, with some evidence of clubbing activities being moved outside of central London (particularly to the east and north of the city).¹⁰² Some parts of London, such as the West End and Holborn, have seen a particularly high rate of closures recently, although there is no clear link between the rate of growth in property prices and venue closure levels overall.

The numbers of LGBT+ and grassroots music venues may have stabilised in the last year¹⁰³.

These different venues play a range of economic, cultural and social roles; they are, as Nesta puts it, 'part of the city's cultural ecosystem with venues providing spaces for performers and work for artists and designers'.¹⁰⁴ Consequently, there are policy concerns around the loss of LGBTQ+ and grassroots music venues, and certain pubs that play an important community function. There are also a variety of reasons for the loss of different types of venues, which in some cases may include changes in consumer preferences.¹⁰⁵

6.4 Developments in Cultural and leisure activities workplaces

Despite the increase in Cultural and leisure activities workplaces reported in Chapter 5 there has been both growth and decline within certain important sub-categories¹⁰⁶. Table 6.1 reports this by local authority for 2012-17. In the light of concerns about cultural infrastructure it can be seen that there has been an increase in the number of workplaces engaged in creative, arts and entertainment activities at a London level, although there are both local authorities with an increase, and others with a decrease. Across other sub-categories there has been an increase in workplaces for all local authorities – 'restaurant and mobile food service activities' accounted for more than half (56%) of growth with particularly strong growth in Hackney (+275), Camden (+260) and Tower Hamlets (+245). Within it, there was an increase in both licensed restaurants (+1,320) and unlicensed restaurants and cafes (+2,045), as well as an increase in takeaway food shops and mobile food stands (+880)¹⁰⁷. The one sub-category where there has been an aggregate marked decline in workplaces is in 'beverage serving activities'¹⁰⁸ – which includes both licensed clubs and public houses and bars – numbers across London fell by 375 or 8% from 2012 to 2017, and with most local authorities contributing to this decline.¹⁰⁹

¹⁰⁰ The research suggests that designated venues are (often) strongly desired by members of LGBT+ communities. See: UCL Urban Laboratory (2017) [LGBTQ+ Cultural Infrastructure in London: Night Venues, 2006–present](#)

¹⁰¹ Nesta worked with Resident Advisor, who concentrate on electronic music, to come up with its definition for a night club. There is no single established definition to distinguish between music venues and night clubs.

¹⁰² Nesta (2017) [The clubbing map: What has happened to London nightlife?](#)

¹⁰³ See [LGBT+ nightlife venues | London City Hall](#) and [Mayor creates first map of London's music spaces | London City Hall](#)

¹⁰⁴ Nesta (2017) [The clubbing map: What has happened to London nightlife?](#)

¹⁰⁵ See, for example: The Economist (2017) [Why London's pubs are disappearing](#). For a summary of recent trends, see Alix Partners / CGA (2017) [Market Growth Monitor Issue 10](#)

¹⁰⁶ See Annex A for more explanation of definitions

¹⁰⁷ More data on trends in unlicensed restaurants and food takeaways is available at [Number of public houses, licenced clubs, restaurants and takeaways in London, 2001 to 2017 - Office for National Statistics](#)

¹⁰⁸ 'Libraries, archives, museums and other cultural activities' workplaces also saw a decline across London from 2012 to 2017 (-20).

¹⁰⁹ Interestingly, by employment size band, the decline in 'Beverage serving activities' workplaces in London between 2012 and 2017 has been concentrated on local units with 0-9 employees (-645). By comparison, the number of local units with 10 to 49 employees in this group increased during this time (+255), as did local units with 50 or more employees (+10).

Table 6.1: Breakdown of change in Cultural and leisure activities workplaces, by London local authority, 2012-17

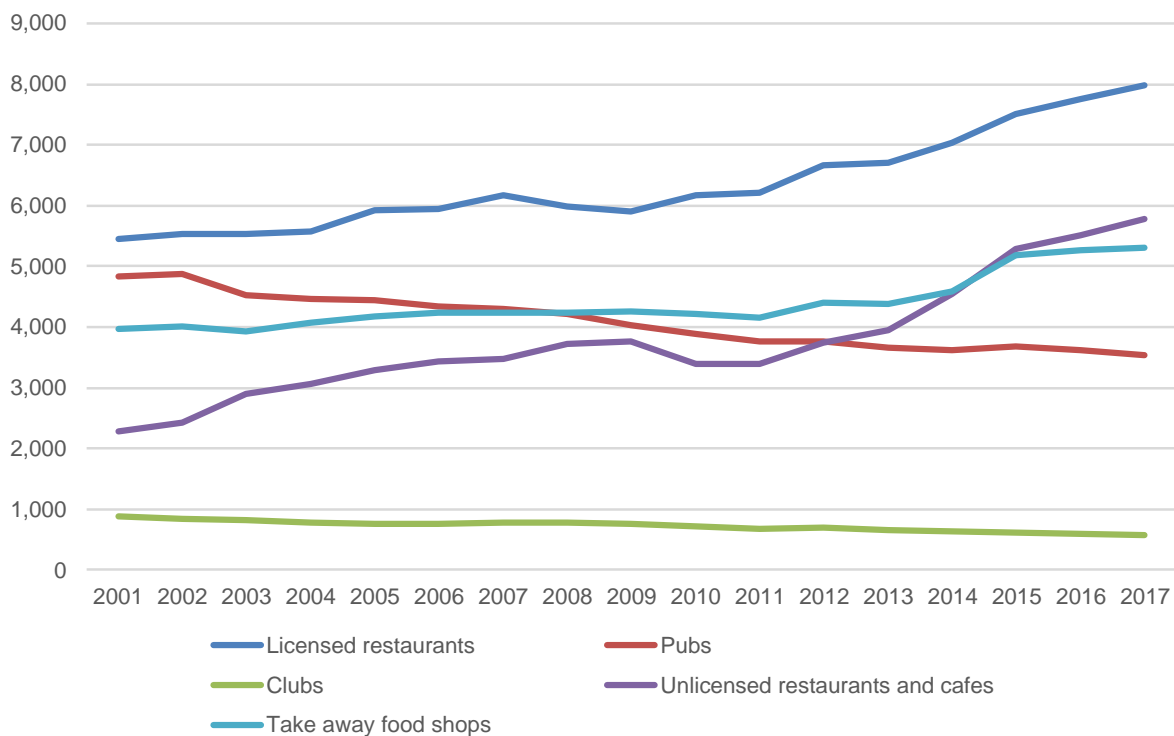
Area	551 : Hotels and similar accommodation	561 : Restaurants and mobile food service activities	562 : Event catering and other food service activities	563 : Beverage serving activities	801 : Private security activities	900 : Creative, arts and entertainment activities	910 : Libraries, archives, museums and other cultural activities	920 : Gambling and betting activities	931 : Sports activities	932 : Amusement and recreation activities	Cultural and leisure activities (total)
Barking and Dagenham	0	65	20	-10	30	10	-10	-5	-10	5	95
Barnet	15	100	25	-15	30	-45	-5	5	20	25	155
Bexley	5	55	10	-5	5	0	0	0	20	5	95
Brent	10	120	10	-30	35	0	-10	5	10	5	155
Bromley	0	115	-5	-10	20	65	0	5	25	15	230
Camden	15	260	85	-40	50	-45	10	-5	30	25	385
City of London	10	125	30	-10	70	235	5	15	40	20	540
Croydon	20	175	60	-20	25	5	-15	0	10	-5	255
Ealing	5	115	30	-10	40	25	-10	0	25	20	240
Enfield	0	95	10	-25	20	0	-5	15	20	10	140
Greenwich	5	85	30	-10	30	5	10	15	30	10	210
Hackney	5	275	30	40	20	150	10	10	25	30	595
Hammersmith and Fulham	10	95	25	-25	10	-105	0	-5	30	0	35
Haringey	-5	170	45	-5	30	5	-5	10	20	15	280
Harrow	15	70	10	-10	10	0	-10	35	10	10	140
Havering	10	110	20	-15	25	15	0	0	5	5	175
Hillingdon	25	105	30	-30	35	40	0	5	15	-5	220
Hounslow	20	90	20	-5	20	-20	0	0	5	0	130
Islington	5	170	30	5	30	0	5	-10	15	35	285
Kensington and Chelsea	-5	35	35	5	10	-115	-5	-5	-10	5	-50
Kingston upon Thames	5	40	30	-15	0	10	5	0	0	0	75
Lambeth	10	195	25	-20	5	20	0	-5	30	25	285
Lewisham	5	125	35	10	20	85	0	10	15	15	320
Merton	5	85	20	-15	25	5	0	0	10	10	145
Newham	15	180	50	-5	65	10	-5	5	15	0	330
Redbridge	0	120	10	-10	20	45	5	-5	15	10	210
Richmond upon Thames	10	70	20	-10	5	-50	0	0	35	5	85
Southwark	20	205	40	10	30	40	10	-5	5	20	375
Sutton	-5	80	35	-5	5	15	0	5	5	5	140
Tower Hamlets	15	245	40	-15	45	70	0	-5	30	20	445
Waltham Forest	5	180	20	-25	20	70	0	0	20	15	305
Wandsworth	15	155	-55	-10	10	-45	0	-5	35	10	110
Westminster	60	135	20	-45	75	55	10	0	35	60	405
London	325	4,245	860	-375	870	545	-20	55	600	405	7,510

Source: ONS Business Counts

The remainder of this section focuses on places where people go to eat or drink. Figure 6.1 provides the trends, and in summary there were:

- 7,900 licensed restaurants in 2017, an increase of 2,535 since 2001
- 5,785 unlicensed restaurants and cafes in 2017, an increase of 3,505 since 2001
- 5,300 take away food shops and mobile food stands, an increase of 1,330 since 2001
- 3,530 pubs, a decline of 1,305 since 2001
- 570 clubs¹¹⁰, a decline of 310 since 2001

Figure 6.1: Trends in places to eat or drink in London, 2001 to 2017

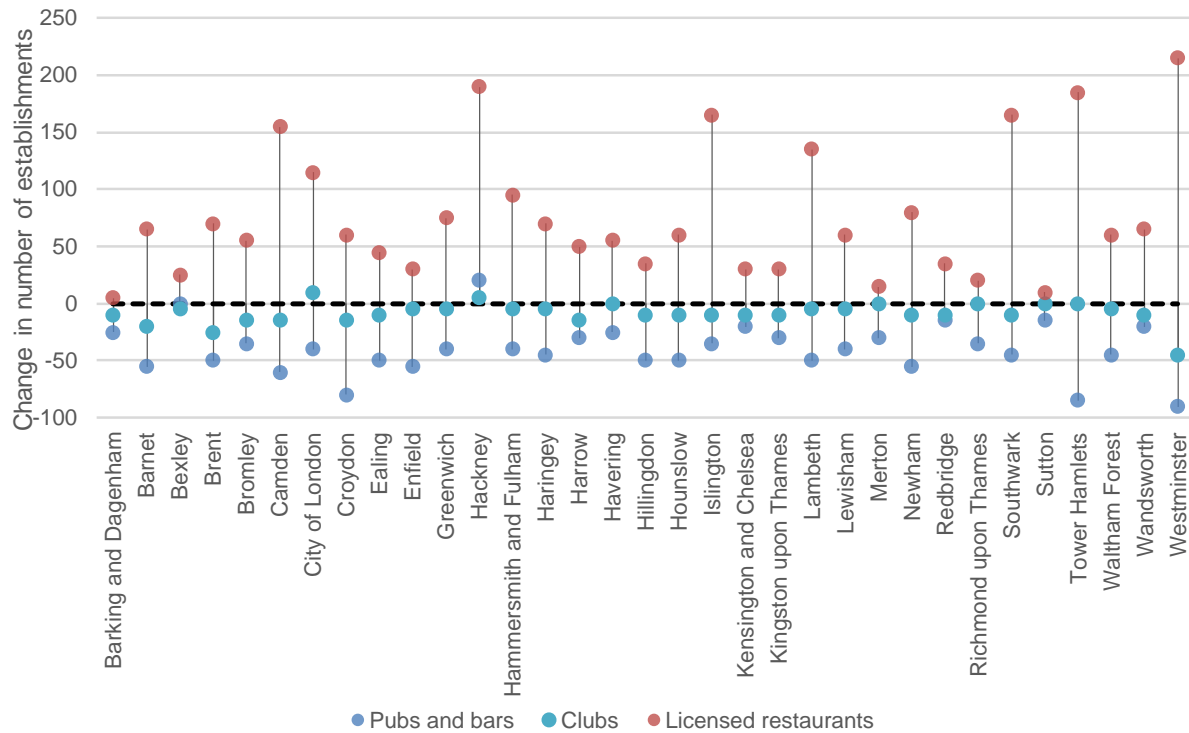


Source: IDBR

The trend at a London level of a growth in licensed restaurants, which has more than offset a decline in pubs and clubs, has also been replicated across most local authorities, Figure 6.2. While the total number of licensed places to eat and drink has fallen in eleven local authorities, it has not been by no more than 35 establishments anywhere.

¹¹⁰ This is the ONS definition

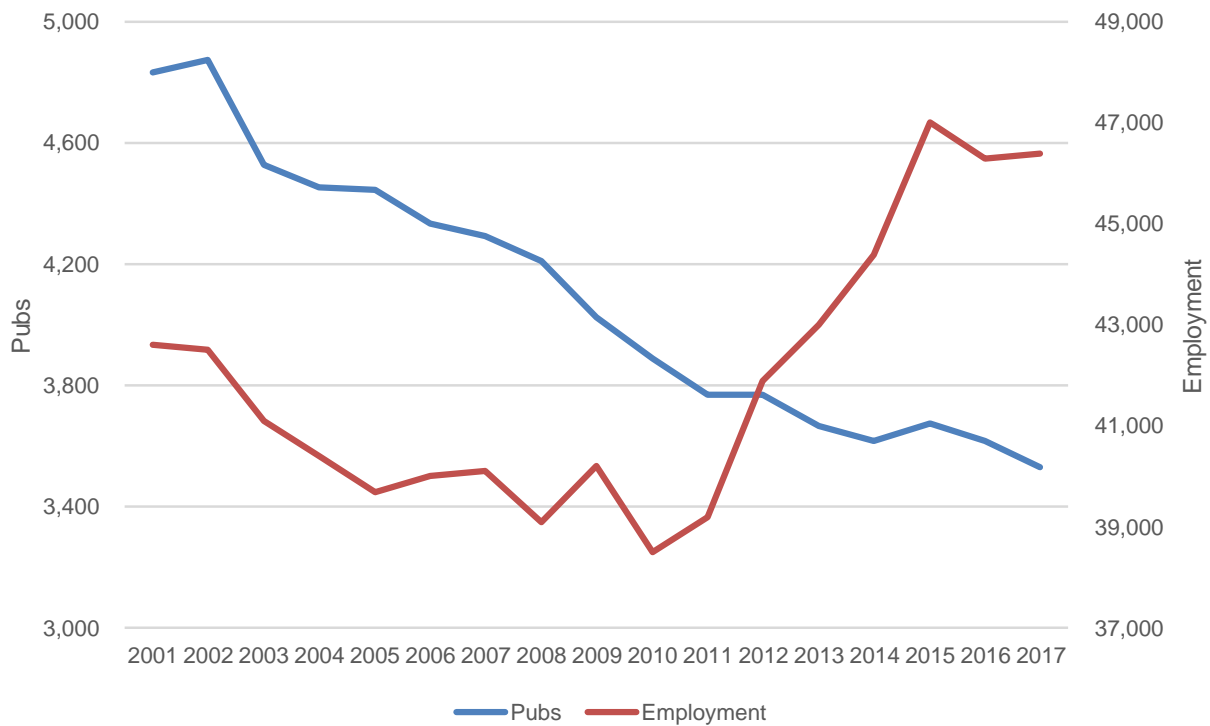
Figure 6.2: Changes by London local authority in pubs, clubs and licensed restaurants, 2001-17



Source: IDBR

While the number of pubs in London has been falling since 2001, employment in pubs started rising from 2010, Figure 6.3. There were 4,835 pubs in London in 2001, which employed 42,600 people. While by 2017 the number of pubs had fallen to 3,530 but employment had risen to 46,400.

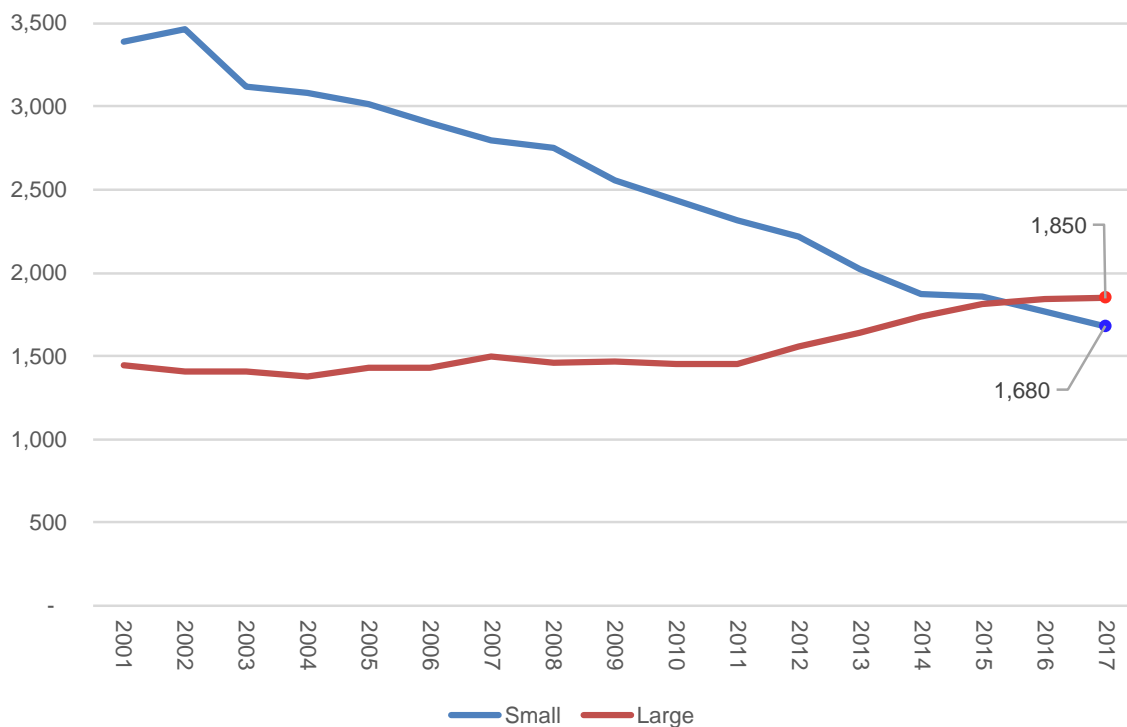
Figure 6.3: Numbers of pubs in London, and employment, 2001-17



Source: IDBR

The overall trend in pub numbers masks trends by size of pub in London. While the number of pubs with fewer than 10 staff has declined from 3,390 in 2001 to 1,680 in 2017, the number of larger pubs has risen from 1,445 to 1,850 in 2017, so that there are now more larger pubs, Figure 6.4. One explanation is that some pubs could have recruited staff, and expanded, rather than closed, to include food as part of their offer.

Figure 6.4: Pubs in London by size, 2001-17, small is fewer than 10 staff



Source: IDBR

Looking at pubs specifically, recent GLA Economics analysis examines the reasons for pub closures in London based on Campaign for Real Ale (CAMRA) data, see Table 6.2.¹¹¹ While in almost half of cases the reason for closure is not known – which may underestimate the number of conversions, particularly to residential - it shows the changes of uses to restaurants/cafes (use class A3) has been relatively common in London in the past 18 years, accounting for just under a fifth of closures where a reason is recorded. The recorded number of cases where pubs have been demolished has declined over this period, although some in the ‘unknown’ category are likely to have been converted to housing.¹¹²

Table 6.2: Pub closures in London, 2000-18, by period and reason for closure

Reason for closure	2000 to 2018 (all data)	2000 to 2002	2003 to 2007	2008 to 2012	2013 to 2017	2018
Demolished	690	171	243	187	89	-
New use: Restaurant / café (class A3)	468	53	117	178	120	-
Unknown	452	13	27	82	300	30
New use: Other (inc. housing, class C3)	317	98	95	106	18	-
New use: Shop (A1)	241	19	64	118	40	-
New use: Unknown	221	17	46	89	66	3
New use: Financial / professional services (class A2)	88	8	31	36	13	-
Temporary closure	33	-	-	1	24	8
Total	2,510	379	623	797	670	41

Source: GLA Economics calculations using CAMRA data

¹¹¹ See [London's Pubs | London City Hall](#)

¹¹² Note: reviewing ten percent of those categorised as ‘unknown’ in the CAMRA data has suggested that many pubs in this sample were actually converted to residential. This means that the below figures may understate the impact of the different types of use conversions, but in particular the impact of conversions to residential.

Indeed, another commonly cited factor for the loss of different types of venues is the rising price of property. Since non-cultural uses (particularly housing) tend to command much higher values in London, changes of use and development options are often attractive to landowners.¹¹³

In response to pressures on cultural venues, the draft new London Plan sets out enhanced policies for supporting the culture and the night time economy.¹¹⁴ GLA officers are also developing a Cultural Infrastructure Plan for London. The Plan, to be published later in 2018, will identify what infrastructure London needs to sustain and develop culture up to 2030. This will include the need for more consistent quantitative data on venues openings and closures.

6.5 Influences on developments in food-led night time activities

PwC research identifies that a significant increase in the frequency of 'eating-out' in the UK, driven by demographic and consumer trends, has underpinned market growth in the restaurant sector in recent decades.¹¹⁵ This is particularly true in London, with nearly seven in ten London based consumers now eating out at least once a week according to market research – 20 percentage points more than the next most frequent region.¹¹⁶ This has contributed to a rise in the number and range of small and medium brand restaurants, particularly in central London. Meanwhile, national level data indicates a downward trend in alcohol intake from eating out purchases over the last 15 years or so.¹¹⁷

These changes could have positive implications for developing a sustainable and balanced night time economy. In theory, an increase in food-led activities can help to introduce a different group of people to an area than premises whose primary activity is the sale of alcohol.¹¹⁸ In doing so, restaurants can help 'normalise' behaviour in a night time area (i.e. to be more like the daytime). There is, for example, evidence to suggest that an increased density of licensed restaurants is associated with reduced rates of hospitalisation, and lower rates of violence and drink-driving.¹¹⁹ An increase in venues which are less or none alcohol-led may also help to make London's night time offer more accessible to a wider range of residents and visitors (e.g. for families or individuals who do not consume alcohol).

Looking ahead, though, there is evidence that the market environment for Cultural and leisure activities is becoming more challenging. PwC research points towards a tough outlook for consumer spending and cost pressures linked to rises in the minimum wage and business rates.¹²⁰ The UK's decision to leave the EU is also likely to have an impact on this sector, with 32% of jobs in London's Accommodation and food services sector held by workers born in the rest of the European Economic Area (EEA) in 2016.¹²¹ Examining industry codes in more detail

¹¹³ See, for example: Centre for Cities (2018) [The rise in urban living is threatening nightlife in cities – here's how to protect it](#)

¹¹⁴ Mayor of London (2018) [Draft New London Plan - Policy HC6 Supporting the night-time economy](#)

¹¹⁵ PwC (2017) Restaurants 2017: Food for thought. Note: Research by Deloitte also suggests that eating-out has shifted from being an 'occasional activity' to being 'frequent activity' in the UK. Source: Deloitte (2016) [A view on the UK leisure consumer](#).

¹¹⁶ CGA (2017) [Market Growth Monitor Issue 10](#)

¹¹⁷ Department for Environment, Food and Rural Affairs (2017) [Family Food 2015](#)

¹¹⁸ GLA Economics (2012) [Alcohol consumption in the night-time economy: Policy interventions](#)

¹¹⁹ Hadfield, P. (2011) Night-Time Economy Management, International Research and Practice, A review of the city of Sidney.

¹²⁰ PwC (2017) Restaurants 2017: Food for thought

¹²¹ GLA Economics (2018) [EEA workers in the London labour market. Current Issues Note 56](#)

shows that EEA workers make-up an even higher share of the workforce in certain sub-sectors in London, including licensed restaurants and hotels and similar accommodation.¹²²

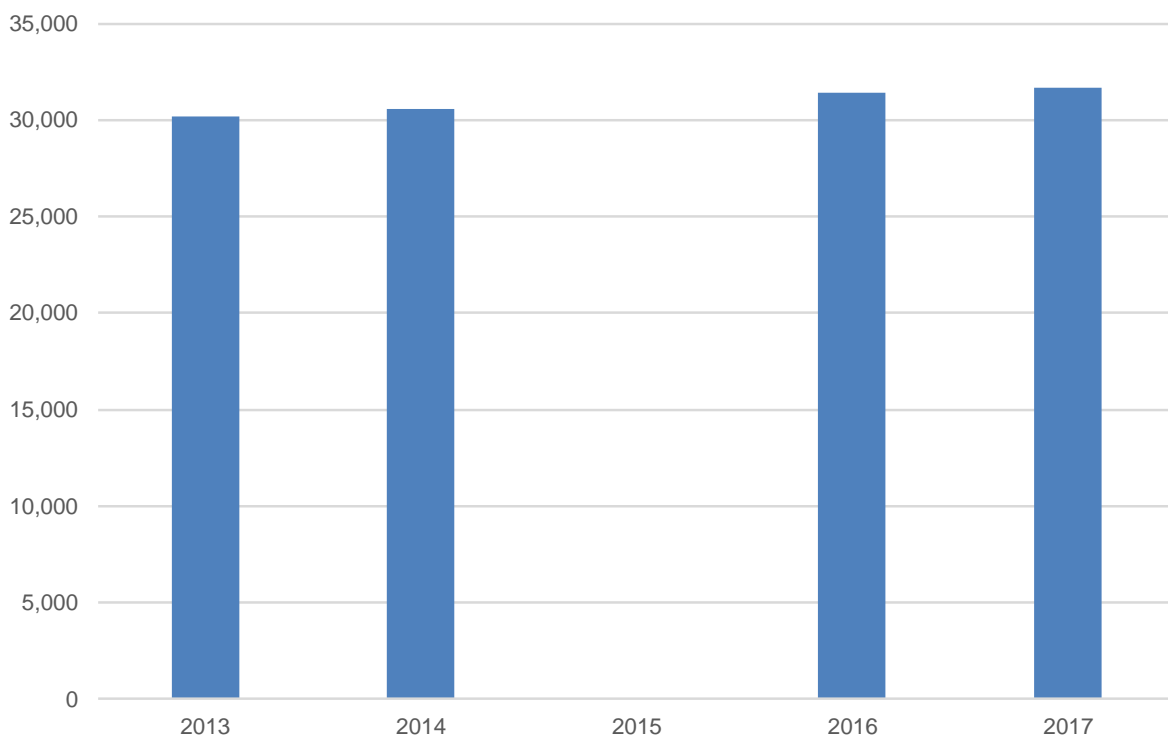
6.6 Alcohol and late-night licensing

In addition to research into specific venue types, data on alcohol and late-night refreshment licensing in London can also add to our understanding of trends in night time premises in the capital. A premises licence gives authority under the 2003 Act for a premise to be used for the sale of alcohol, the provision of regulated entertainment, or the provision of late-night refreshments. This includes pubs, public bars, and restaurants, as well as supermarkets, stores, hotel bars, and other venues. A license will specify opening hours as well as whether sales can be on or off premises.

6.6.1 All premises with licences

There were 31,670 premises licences in London as at 31 March 2017, a 1% increase of 252 premises compared with 31 March 2016, Figure 6.5. This includes 26,270 premises licences for selling alcohol and continues a broadly increasing trend seen in recent years. For example, the number of premises licenses in London has increased by 1,460 or 5% since the year to March 2013 compared to 3% growth for England and Wales as a whole. Overall, London's share of total licensed premises in England and Wales (15%) is in-line with its share of the population aged 18 and over (15%).¹²³ In the year to March 2017, around 2,070 new premises license applications were granted in London, compared to 125 which were rejected.

Figure 6.5: Premises licences in London, 31 March 2013 to 31 March 2017



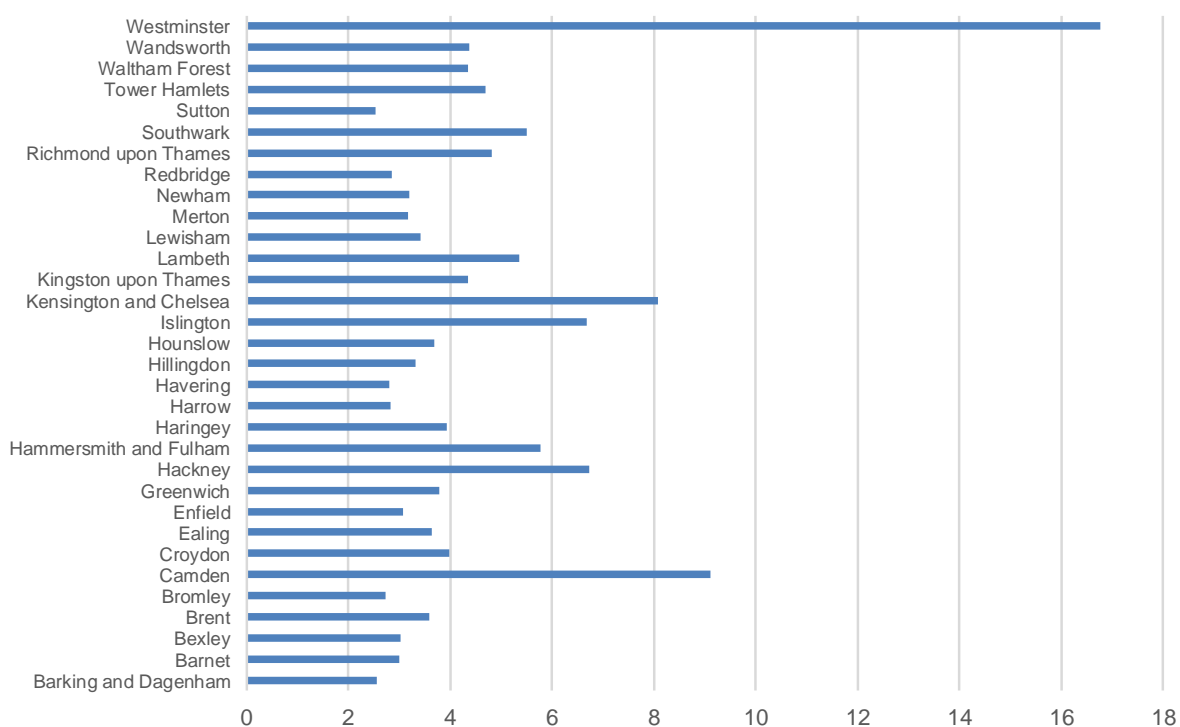
Source: Home Office, *Alcohol and late-night refreshment licensing, England and Wales, 31 March 2017*, Table 1. Data was not collected for year ending 31 March 2015.

¹²² ONS (2017) Annual Population Survey three-year dataset (2014-2016)

¹²³ Sources: Home Office (2018) *Alcohol and late-night refreshment licensing, England and Wales*; ONS (2018) Mid-year population estimates

There is, however, considerable variation in the number of licensed premises per resident across the capital. Figure 6.6 sets out the number of premises licenses per 1,000 resident population aged 18+ by London borough. It shows that, at 16.8 per 1,000 population aged 18 and over, Westminster had by far the highest number of premises licenses relative to its resident population in 2017, followed by Camden (9.1) and Kensington and Chelsea (8.1). Conversely, Sutton (2.5) and Barking and Dagenham (2.6) had the lowest number of premises licenses per 1,000 population aged 18+. On average, outer London boroughs had 3.6 premises per 1,000 population aged 18+ compared to 6.7 across inner London boroughs. This confirms that many people travel to go out at night, although data is not available to estimate footfall, which would be a better denominator to use to consider the distribution of premises licenses across London.

Figure 6.6: Number of Premises Licenses per 1,000 population aged 18+ in London, selected licensing authorities, 31 March 2017



Source: Home Office, Alcohol and late-night refreshment licensing / ONS Mid-Year Population Estimates
Note: does not include Inner and Middle Temple in London

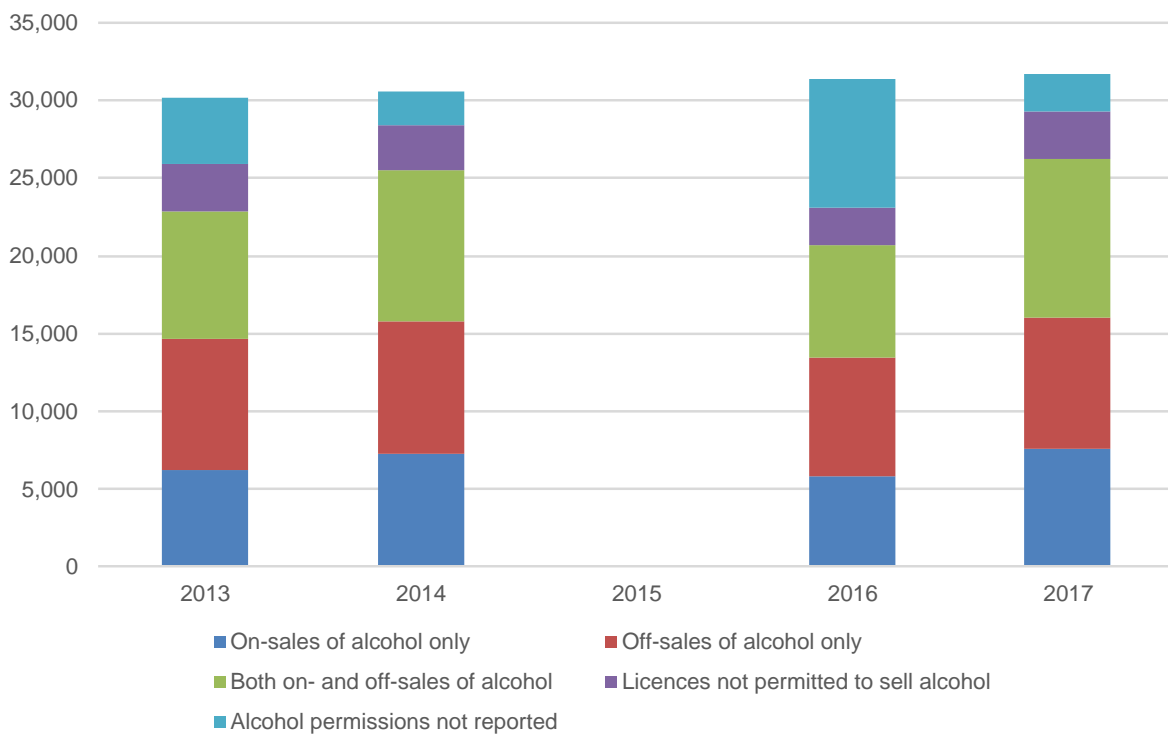
For premises that are permitted to sell alcohol: on-sales refers to those which can sell alcohol for consumption on the premises; and off-sales refers to those which can sell alcohol for consumption off the premises. For the year to 31 March 2017, the figures for London show that there were:

- 7,600 premises licences that authorised on-sales of alcohol only (24%)
- 8,400 premises licences that authorised off-sales of alcohol only (26%).
- 10,300 premises licences that authorised both on- and off-sales of alcohol (32%).
- 3,000 premises licences that did not authorise sales of alcohol (9%)
- 2,370 premise licences where permissions were not reported (8%).

Figure 6.7 sets out the trends for recent years. While variations in the reporting of alcohol permissions mean that year-on-year differences should be treated with some caution, the

available data for alcohol permissions suggests that, for London as a whole, the number of premises that authorised on-sales of alcohol only has generally increased since 2013. The largest rise was in the number of premises providing both on- and off-sales of alcohol.¹²⁴ The number of off-sales premises was more or less unchanged over this period.

Figure 6.7: Premises licences, by alcohol status, London, 31 March 2012 to 31 March 2017



Source: Home Office, *Alcohol and late-night refreshment licensing, England and Wales, 31 March 2017, Table 1*.
Note: Data was not collected for year ending 31 March 2015.

Inconsistencies in reporting means there is even more variation in the data on licensed premises at a licensing authority level.¹²⁵ That said, the majority of licensing authorities in London (23), which in the city are local authorities plus Inner and Middle Temple, saw an increase in the number of licensed premises between 2013 and 2017, with the largest increases found in Hackney (+357) and Westminster (+315) and the largest declines in Hammersmith (-118) and Islington (-113) – the latter being driven by a decline in off-sales only premises. Focusing on premises licensed for on-sales of alcohol only, 24 licensing authorities saw an increase in this period, compared to 19 which saw a rise in premises licensed for off-sales of alcohol only.

6.6.2 24-hour alcohol licenses

The Licensing Act 2003 introduced a provision to allow premises to apply for 24-hour alcohol licenses. This liberalisation of licensing doesn't equate to premises being open 24-hours a day. It allows premises to set their own opening and closing times. The use of these licenses remains a 'relatively minor phenomenon' in the UK according to a recent House of Lords report.¹²⁶ This seems to hold true in London as well. Based on completed returns to the Home Office from

¹²⁴ Note: many pubs have licenses allowing alcohol to be consumed on and off the premises – often for beer gardens and other external drinking areas.

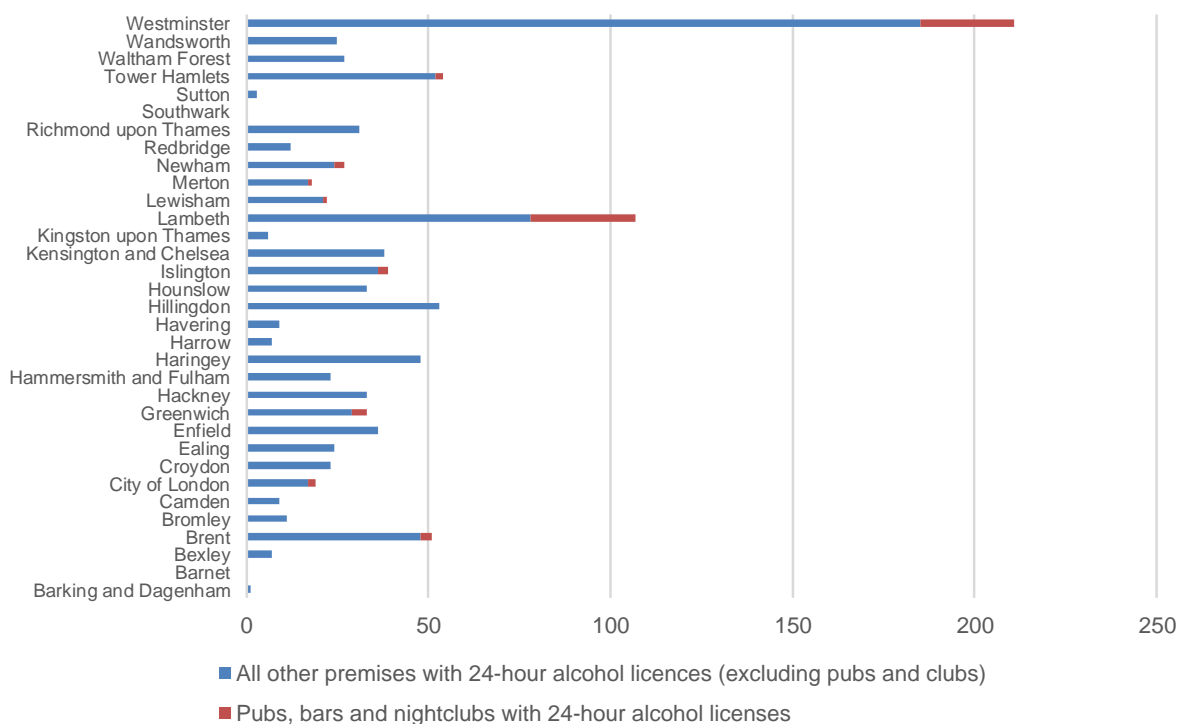
¹²⁵ Home Office (2017) [Home Office alcohol and late night refreshment licensing statistics: user guide - GOV.UK](#)

¹²⁶ House of Lords (2017) [The Licensing Act 2003: post-legislative scrutiny](#)

licensing authorities, there were 1,040 premises with 24-hour alcohol licenses in London as of March 2017. Although this is up by 12% (115) since 2012, recent changes have owed more to variation in response rates, and there is little sign of an overall rise in premises with 24-hour licenses in London.¹²⁷

Looking more closely at these premises, the largest categories were supermarkets and stores (43%) and hotel bars (23%). Only 7% of 24-hour licenses were pubs, bars and nightclubs with wider evidence suggesting that, where on-trade licensees have sought to extend their hours into the night, they have generally applied for more moderate extensions (e.g. 30–60 minutes).¹²⁸ As Figure 6.8 shows, Westminster reported the highest number of 24-hour licensed premises in London in 2017 (211), followed by Lambeth (107).

Figure 6.8: Premises with 24-hour alcohol licences, London, 31 March 2017



Source: Home Office, *Alcohol and late-night refreshment licensing, England and Wales, 31 March 2017*. Note: data for Southwark was not available for this period.

6.6.3 Club premises certificates

A club premises certificate is a specific type of licence, available only to members clubs (and which cannot be open to the general public).¹²⁹ There were 1,070 club premises certificates in London as at 31 March 2017, a 1% fall compared with 31 March 2016 (compared to a 3% fall across England and Wales). As Figure 6.9 shows, the number of club premises in London has not changed significantly in the last five years or so. The vast majority of club venues are

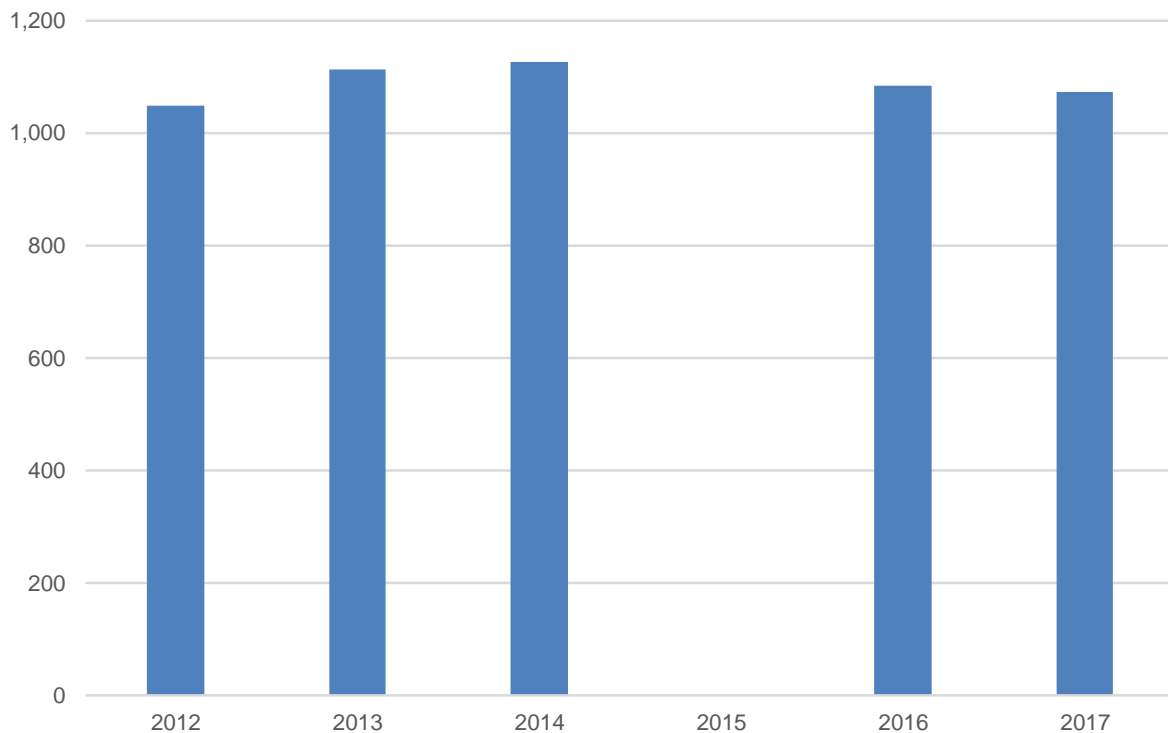
¹²⁷ While variation in response rates makes it difficult to identify trends, this would be consistent with the national picture. For more detail see: Home Office (2017) [Alcohol and late night refreshment licensing, England and Wales, 31 March 2017](#)

¹²⁸ House of Lords (2017) [The Licensing Act 2003: post-legislative scrutiny](#)

¹²⁹ Club premises certificates offer several benefits to clubs over a premises licences, including the absence of a requirement to specify a designated premises supervisor and exemption from some of the immediate closure powers available to the police.

permitted to sell alcohol (51% on-sales only; 40% both on- and off-sales; and, 9% have no licence).¹³⁰

Figure 6.9: Club premises certificates, London, 31 March 2012 to 31 March 2017



Source: Home Office, *Alcohol and late-night refreshment licensing, England and Wales, 31 March 2017, Table 1*. Data was not collected for year ending 31 March 2015.

At a licensing authority level, Hillingdon (89) recorded the highest number of club premises in 2017, followed by Bromley (69), Richmond upon Thames (57) and Havering (48). Thus, unlike the overall number of premises licenses, the number of club premises licensed tends to be higher in outer London areas. Although it should be noted that the existence of a club premises certificate does not necessarily mean that all such premises are providing such a service.

6.6.4 Entertainment licensing

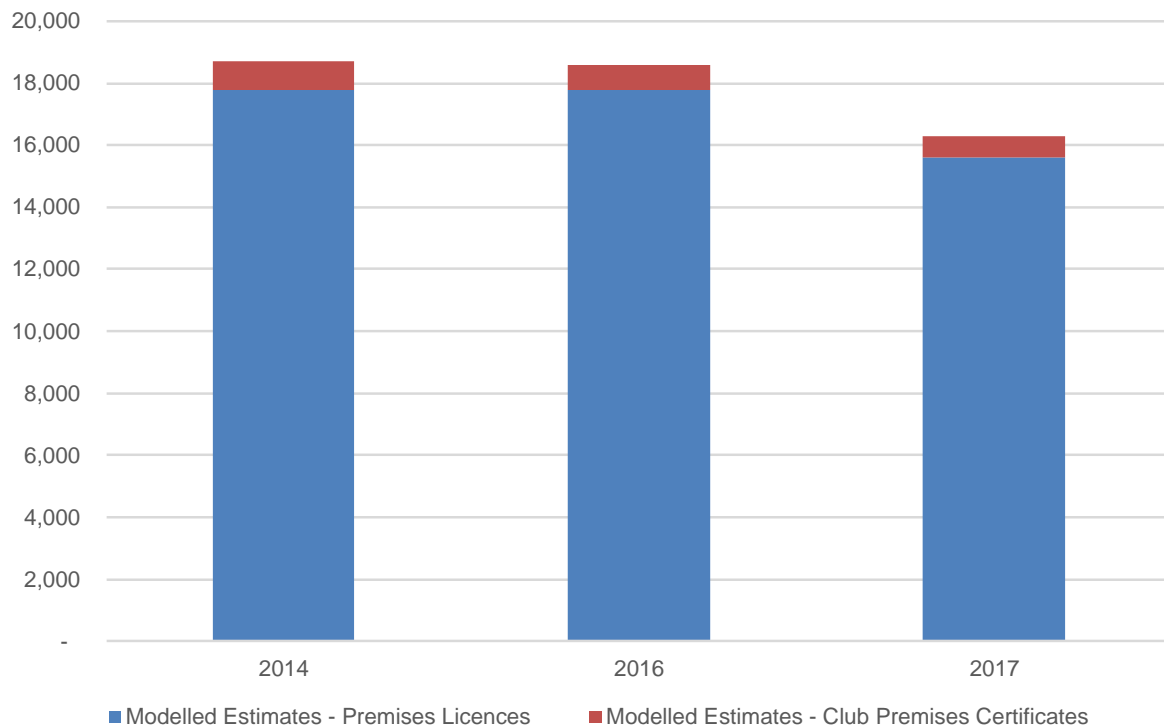
This section provides modelled estimates of the number of premises and clubs which are licensed to provide regulated entertainment.¹³¹ Premises, which include things such as restaurants, shops, bars and parks, may have a licence covering several forms of entertainment. This licence may also cover alcohol and late-night refreshment. According to DCMS analysis, and see Figure 6.10:

- There were 15,600 premises licenses authorising regulated entertainment in force in London as at 31 March 2017, a 12% decrease compared to 31 March 2016 (the largest fall for any region).
- There were 700 club premises certificates authorising regulated entertainment in London on 31 March 2017, a 4% decrease compared to 31 March 2016.

¹³⁰ There were fewer than 40 club certificates in London that did not permit the sale or supply alcohol as at 31 March 2017.

¹³¹ The types of regulated entertainment which may require a licence under the Licensing Act 2003 are: A performance of a play; an exhibition of a film; an indoor sporting event; boxing or wrestling entertainment (both indoors and outdoors); a performance of dance; any playing of recorded music or a performance of live music, except amplified live or record recorded music if the audience is under 500 people, and it is taking place between 8 and 11 pm in alcohol-licensed premises.

Figure 6.10: Modelled estimates of the number of premises licences and club premises certificates authorising the provision of regulated entertainment, London, 2014-2017



Source: DCMS, *Entertainment Licensing Statistics 2017*

6.6.5 License reviews

A license review provides a sense of whether a premise might be welcoming at night. Reviews of premises, both on and off-licenses, where licensing authorities are asked to review a licence on the grounds of it having an adverse impact on the licensing objectives (i.e. the prevention of crime and disorder, public safety, the prevention of public nuisance, and the protection of children from harm), have fallen recently. In the year ending 31 March 2017, just over 180 reviews were completed in London – down 13% decrease compared to the previous year, and these reviews were for less than 0.6% of all premises licenses. This continues a general decline seen since 31 March 2012 (when 220 reviews were completed in London).

Regarding the reasons for completed reviews:

- 45 were for crime and disorder;
- 55 were for public nuisance;
- 36 were for public safety; and
- 19 were for protection of children.¹³²

In around half of cases, reviews resulted in conditions being added to the licence or modified. The most common actions taken following reviews were conditions being added to the licence or modified (92), followed by licence being revoked or a club premises certificate being withdrawn (49).

¹³² More than one reason was cited in some instances.

7 London's night time travel

7.1 Introduction

Safe and convenient transport plays a key role in ensuring London's residents and visitors can access (and leave) town centres at night – for work, culture, retail, running errands and leisure. As well as an extensive network of night buses, the opening of the Night Tube on many lines throughout the weekend (from August 2016) and the Night Overground (from December 2017) are significant developments in London's transport offer.

The provision and cost of travel in London affects what people can do, whether they are London residents or commuters going out or working, or domestic or international visitors. This chapter brings together the available evidence on travel patterns including that in other parts of this report. Chapter 3 covers night time workers and commuters, Chapter 4 covers international tourists, and Annex D covers travel by time of day within London on public transport. The other side of commuting patterns is the location of jobs, and Chapter 5 looked at the spatial distribution of the growth in jobs in night time industries across London.

The data used in this Chapter comes from Transport for London (TfL), primarily from the London Transport Demand Survey (LTDS)¹³³, the bus users survey¹³⁴, and an extract of trip journey data using Oyster and contactless payment especially for this analysis¹³⁵. The available data does not correspond to the definition of night time of 6pm to 6am adopted elsewhere in this paper, and instead this paper reports what there is which corresponds to actual travel patterns through the day.

7.2 Main findings

Improvements in night travel are a key priority for Londoners who go out most at night, that is men to work and 18-24 year olds for leisure

- 18-24 year olds identify improved night time transport as their first priority to improve London at night, and this was sought by 52% of the age group
- For men it was their 2nd priority, and was sought by 44% of men
- 18% of trips (which covers all modes of transport including walking) at night are made by 17-24 year olds, who account for 9% of trips during the day. Almost half of trips at night are made by 25-44 year olds
- Around a fifth of all trips made by London residents start between 6pm and 6am
- Around a quarter of journeys on public transport start between 6.30pm and 6.30am
- Almost two-thirds of trips by London residents at night are for leisure reasons
- The next highest category of trip at night is work-related at 17%, which compares to 18% of trips during the day
- The introduction of the Night Tube on Friday and Saturday nights in late 2016 was a notable extension of night time public transport provision

While the number of trips in London at all times of day has remained fairly constant, there has been a growth in the relative importance of public transport, and there has

¹³³ See [London Travel Demand Survey - Transport for London](#) and as it provides evidence for reports [Travel in London reports - Transport for London](#)

¹³⁴ See [TfL bus users survey](#)

¹³⁵ See Annex D for a fuller write-up

been marked growth in use of public transport early in the morning (4-7am), and for tube and night bus journeys at night (10pm-4am) throughout the week

- Between 2005/6 and 2016/17 the total number of trips in London by Londoners increased by 1% on weekdays
- There has been an increase in public transport use, whether this is the underground, Docklands Light Railway (DLR), bus, tram or national rail from 27% to 30% of all trips between 2005/6 and 2016/17.
- Trips in a car, either as a driver or passenger, declined from 41% to 32% of all trips over this period
- Most trips or public transport journeys within London, including commuter journeys¹³⁶, remain either in inner London or outer London
- Only between 4.30am and 6.30am on a Wednesday¹³⁷, and 4.30am and 8.30am on a Saturday did more journeys on public transport start in outer London, rather than inner London
- Early morning (4-7am) weekday trips increased by 21% between 2005/6 and 2016/17, although in 2016/17 only 3% of trips over the day started in this time window
- Tube journeys after 10pm increased more than two and a half fold between 2000 and 2011
- Night bus use increased more than one and a half fold between 2000 and 2011
 - Over half of night bus journeys are to travel to work
 - Over half of night bus passengers use the night bus five days a week

The introduction of the Night Tube on Friday and Saturday nights in late 2016 was an important development in transport provision, but there is no publicly available evaluation of its impact in changing travel patterns.

Visitors are positive that London's public transport makes it easy to get around in the evening. They tend, though, to remain in central London, and visitors have low awareness of the Night Tube

- 86% of visitors were positive that London's public transport made it easy to get around the city in the evening
- The night time activities of visitors tend to be heavily concentrated in central London (e.g. Soho, Oxford Street)
- Visitors tend not to venture to other parts of the city for nightlife activities, with far fewer going to east or south London in particular
- After dark, 81% of visitors used the tube before midnight, and 75% walked
- 14% of visitors used the Night Tube after midnight
- 47% of international visitors were unaware of this service in September 2017 (although the survey was conducted around a year after its launch)¹³⁸
- 38% used black cabs or private hire vehicles to get around in the evening

¹³⁶ See Chapter 3

¹³⁷ In January 2018

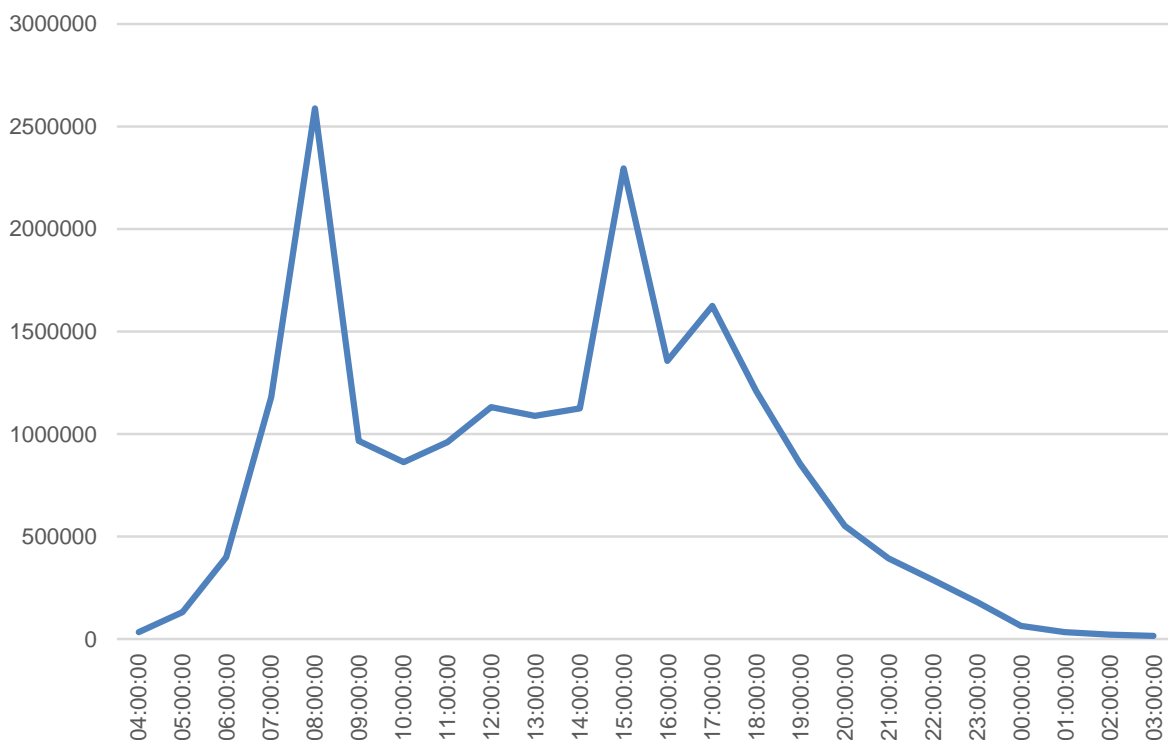
¹³⁸ See Chapter 4

7.3 London level travel patterns over the course of a day, and trends over time

The London Travel Demand Survey (LTDS)¹³⁹ is a representative survey of 8,000 London households carried out annually since 2005/06.¹⁴⁰ It is a record of all trips regardless of mode of transport. According to this source, the number of trips made by London residents in the capital averaged 18.7 million per day in 2015/16 or 2.3 trips per day per person (compared to 2.7 trips per day per person for all travellers in London). Of these trips, around a fifth were started between 6pm and 6am, mostly before midnight (only 1% of trips made by London residents were started between midnight and 6am).

The frequency of journeys varies by time of day. The busiest hour for residents to travel in the week were 8am and 3pm. The profile has altered slightly in recent years although the pattern remains largely the same.

Figure 7.1: Trips made by London residents in London, by start time (hour), weekday only, 2016/17



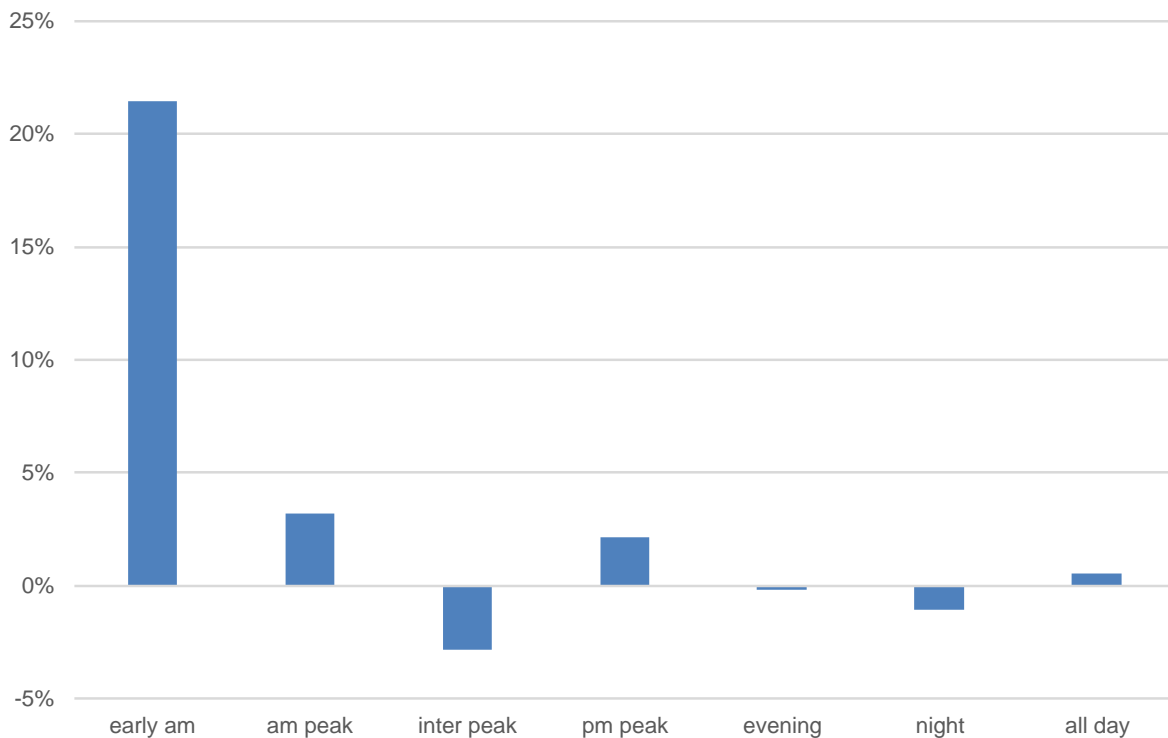
Source: LTDS

Between 2005/6 and 2016/17 the number of trips in London by Londoners increased by 1% on weekdays. There have been increases in the morning and evening peaks of 3% and 2%, and declines in trips in the interpeak and night time (defined here as 10am-4pm, and 10pm-4am) periods of 3% and 1% respectively. The largest increase in trips has been in the early am (4-7am) period when the numbers rose by 21%. This is from a low base as in 2016/17 3% of trips started in the early am (and it was 3% as well for night time trips) compared with 24% in the morning peak, and 22% in the evening peak.

¹³⁹ The associated publication is Travel in London. Publications and supporting data are available at [Travel in London reports - Transport for London](#)

¹⁴⁰ Trips wholly outside Greater London are excluded.

Figure 7.2: Percentage change in trip numbers in London by London residents between 2005/6 and 2016/17, by time of start of trips, weekdays



Source: LTDS

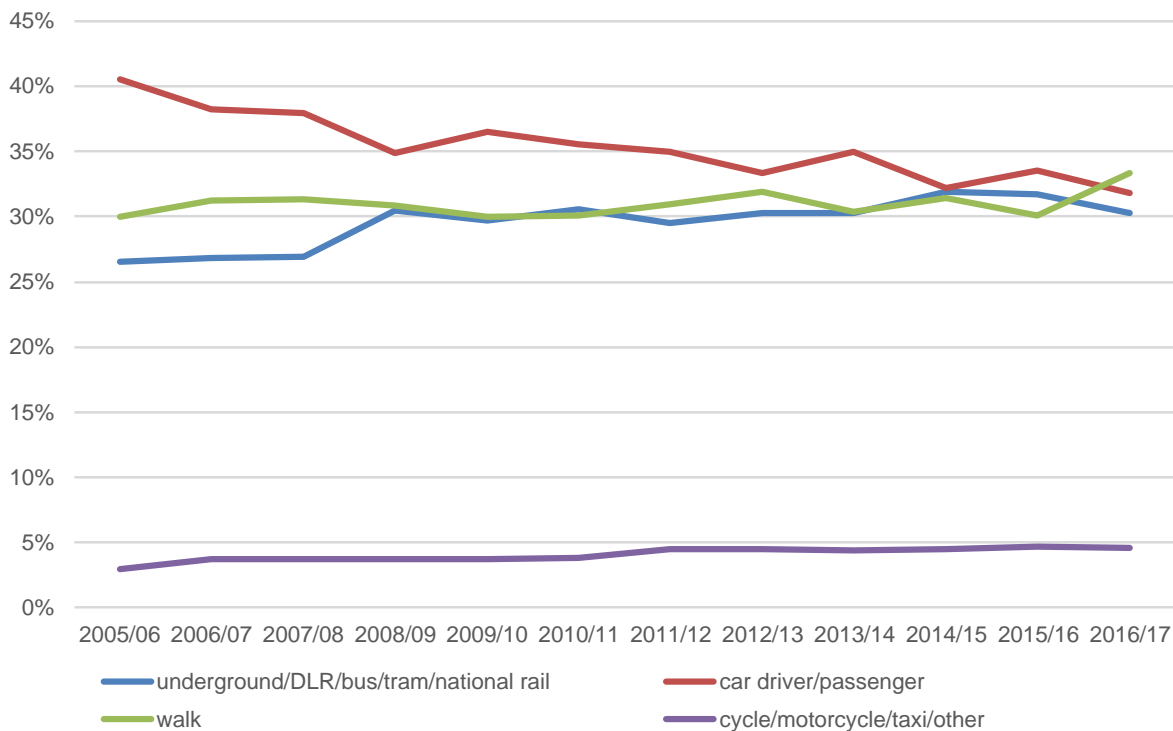
Note: early am is 4-7am, am peak is 7-10am, inter peak is 10am-4pm, pm peak is 4-7pm, evening is 7-10pm, night is 10pm-4am

Annex D reports on travel journeys by time of day on public transport for a Wednesday in January 2018, and the following Saturday. This is a broader measure of travel as it includes all journeys¹⁴¹, and not just those by London residents. The peak time for journeys to start was between 4.30pm and 6.30pm when around 1.5m journeys started – this contrasts with the peak of the LTDS at 3pm, and illustrates that many journeys in London are not on public transport. On Saturday the peak was 12.30pm to 2.30pm when around 1m journeys started. Section 7.5 provides evidence on the reasons for journeys, and while commuting is significant in terms of numbers of journeys on public transport, there are also large numbers for shopping and other leisure trips.

While the number of trips in London by London residents may have changed little between 2005/6 and 2016/17 the mode share has changed. Trips in a car, either as a driver or passenger, was the most important means of transport in 2005/6, and accounted for 41% of trips, although its importance has been declining, thus by 2016/17 it was the means for 32% of trips. Walking was the most important means of transport in 2016/17 accounting for 33% of trips, an increase of 3 percentage points from 2005/6. Over the period there has been an increase in public transport use, whether this is the underground, Docklands Light Railway (DLR), bus, tram, or national rail from 27% to 30% of trips.

¹⁴¹ Paid for using Oyster or contactless card, but not magnetic strip tickets

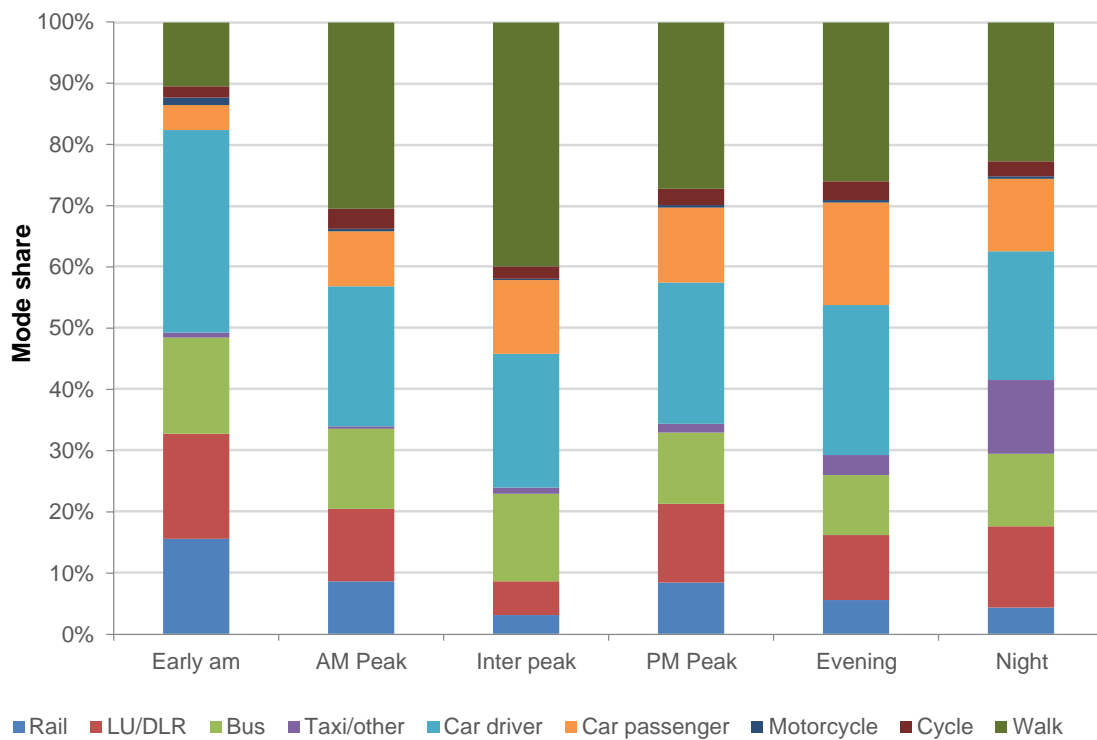
Figure 7.3: Percentage change in mode share for trips in London by London residents on a weekday, 2005/6 to 2016/17



Source: LTDS

Among London residents, the mode of transport people use at night, here defined as 10pm to 4am, differs from those they use in the day (Figure 7.4). The taxi (including licensed private hire) mode share increases most significantly at night – rising from 1% of trips in the day to 12% at night – the same mode share as buses for this time. The proportion of underground trips also increases – from 9% to 13% – while the share of trips made by car or cycling at night remains relatively similar to the day. Conversely, walking makes up less than a quarter (23%) of trips made by Londoners at night, compared with 33% for the whole day.

Figure 7.4: Comparative mode share of trips by time of day, 2016/17

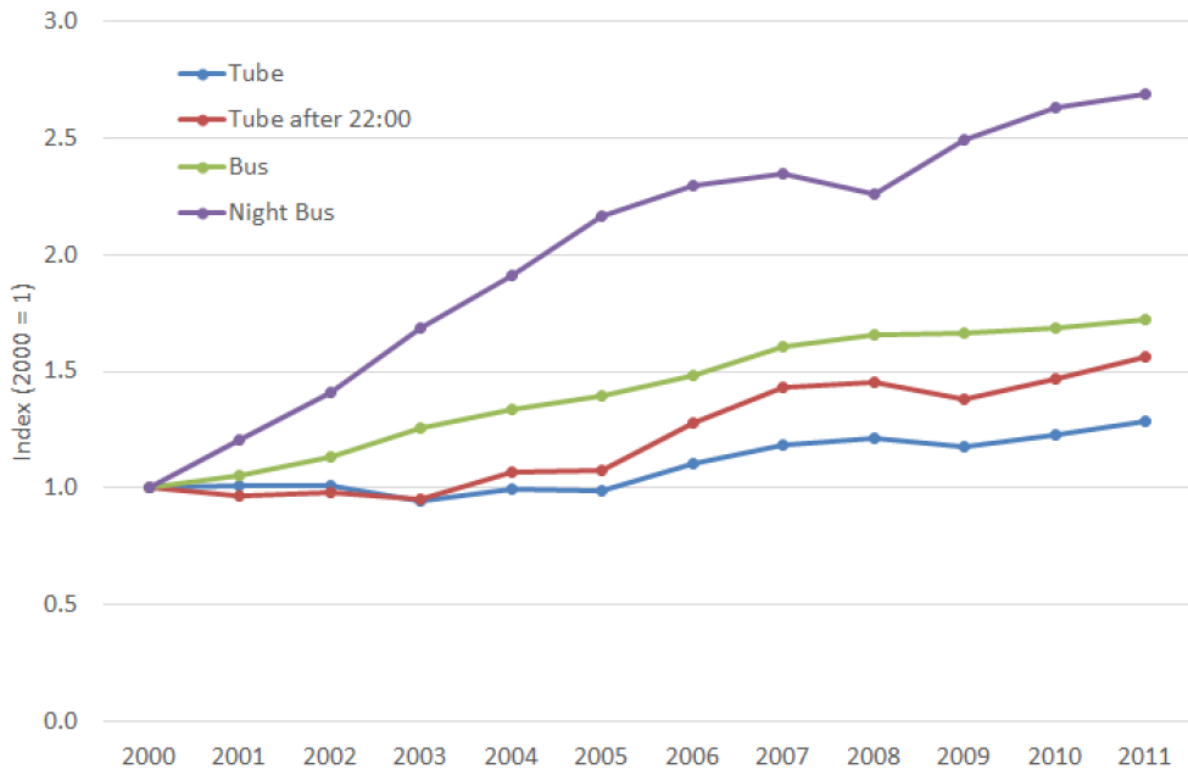


Source: TfL, LTDS 2016/17

Note: early am is 4-7am, am peak is 7-10am, inter peak is 10am-4pm, pm peak is 4-7pm, evening is 7-10pm, night is 10pm-4am

Analysis of trends in public transport use by TfL helped make the business case for the Night Tube, Figure 7.5. Night bus usage rose by 170% between 2000 and 2011, with many travellers suffering delays because they could not board the first bus to arrive. Demand for night buses outstripped all other forms of public transport. Similarly, tube travel after 10pm had risen at around double the rate of daytime trips.

Figure 7.5: Use of public transport 2000-11, index numbers 2000=1.0



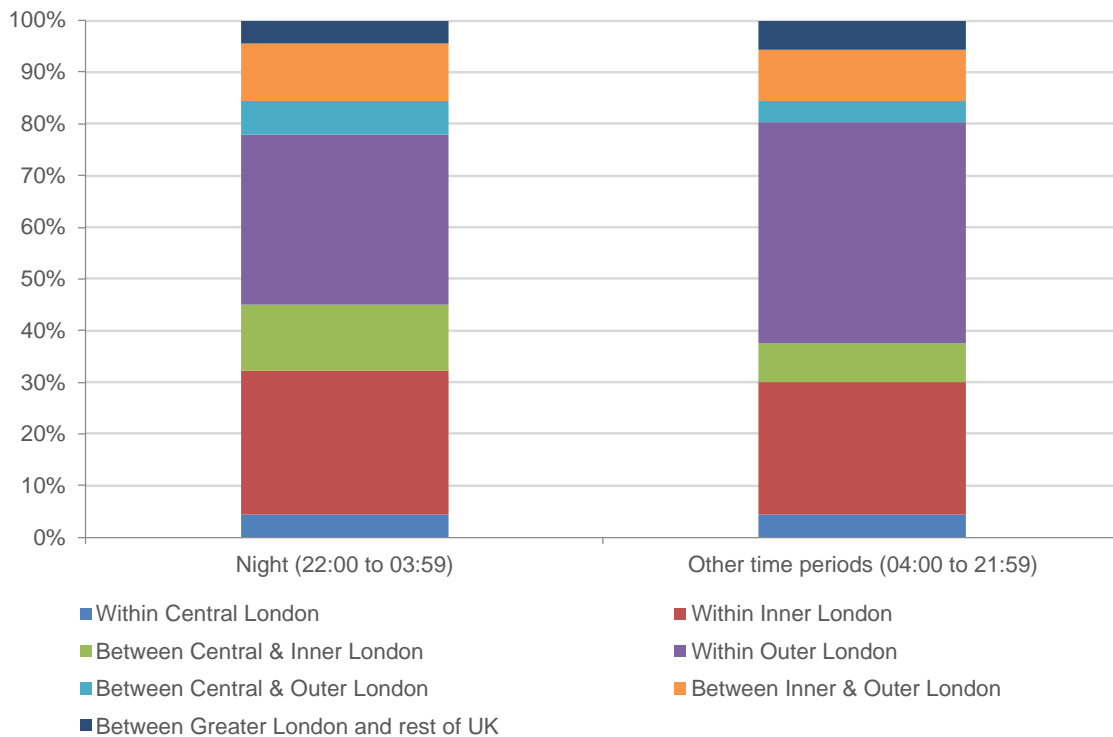
Source: TfL, as reported in TfL 90993 – *Impact of the Night Tube on London’s Night-Time Economy*¹⁴²

7.4 Within London travel patterns over the course of a day

Looking at basic spatial patterns, there is a diverse pattern of trips made by London residents in the capital in both the night and day. On average, journeys to and from central London account for a higher share of trips made by London residents at night, 10pm to 4am in this analysis – 19% of trips at night are between central and inner/outer London, compared with 12% during the day. Nevertheless, most trips are made within inner or outer London. For example, one third (33%) of trips at night are wholly within outer London at night, down from 43% during the rest of the day, Figure 7.6.

¹⁴² Available at [Impact of the Night Tube on London's Night-Time Economy](#)

Figure 7.6: Origin and destination of London resident trips, daytime and night, 2016/17



Source: TfL, LTDS 2016/17.

Notes: Night defined here as 22:00 – 03:59, Inner and outer London use GLA administrative definition¹⁴³

The analysis of commuter journeys in Chapter 3 reached a similar conclusion that the majority of journeys either remain within inner or outer London.

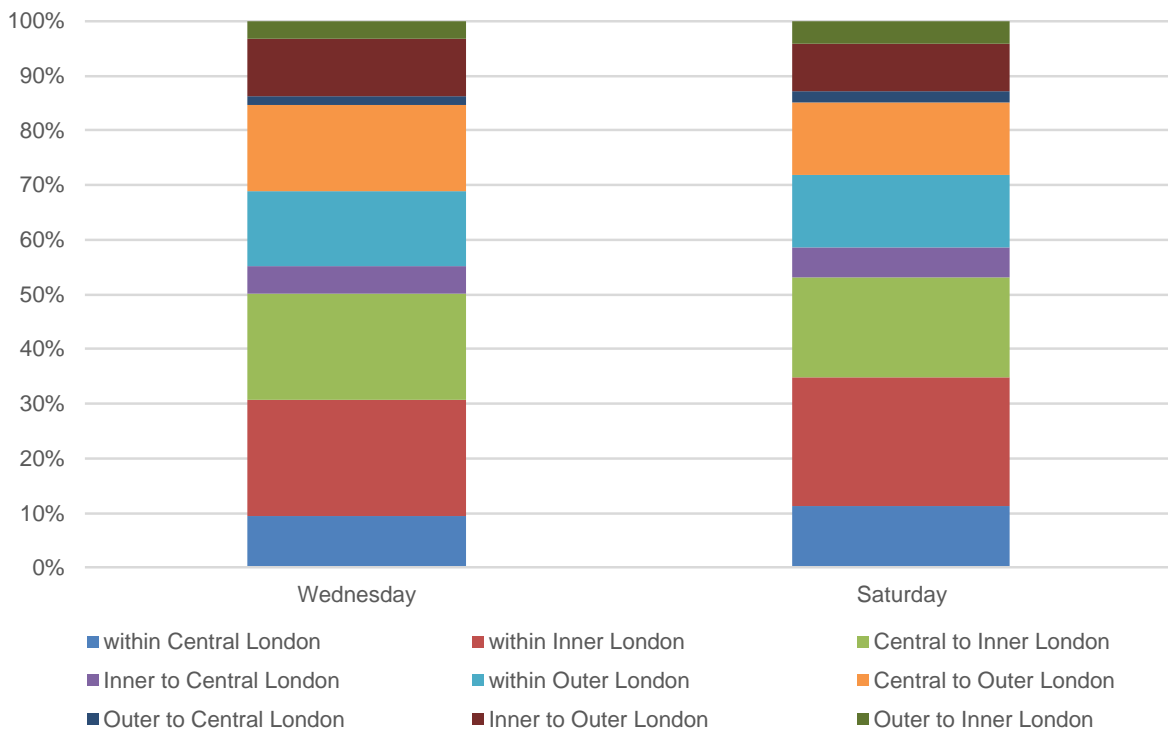
Figures 7.7 and 7.8 compare all public transport journeys within London for 10.30pm-4.30am and 4.30am-10.30pm on a Wednesday and Saturday in January 2018¹⁴⁴. There are journeys in all directions at all times of day – for example, as well as people leaving central London there are also people travelling into central London. Data is not available from this source on reason for travel.

On Wednesday night (10.30pm-4.30am) 55% of journeys on public transport start and end in central or inner London, rising to 60% on a Saturday night, while 13-14% of journeys are entirely within outer London. At other times, for both Wednesday and Saturday, half of journeys on public transport start and end in central or inner London, while around a quarter are in outer London.

¹⁴³ Annex D sets out the definition and explains difference with statistical definition

¹⁴⁴ This analysis is for journeys where the destination is known. Annex D provides further explanation.

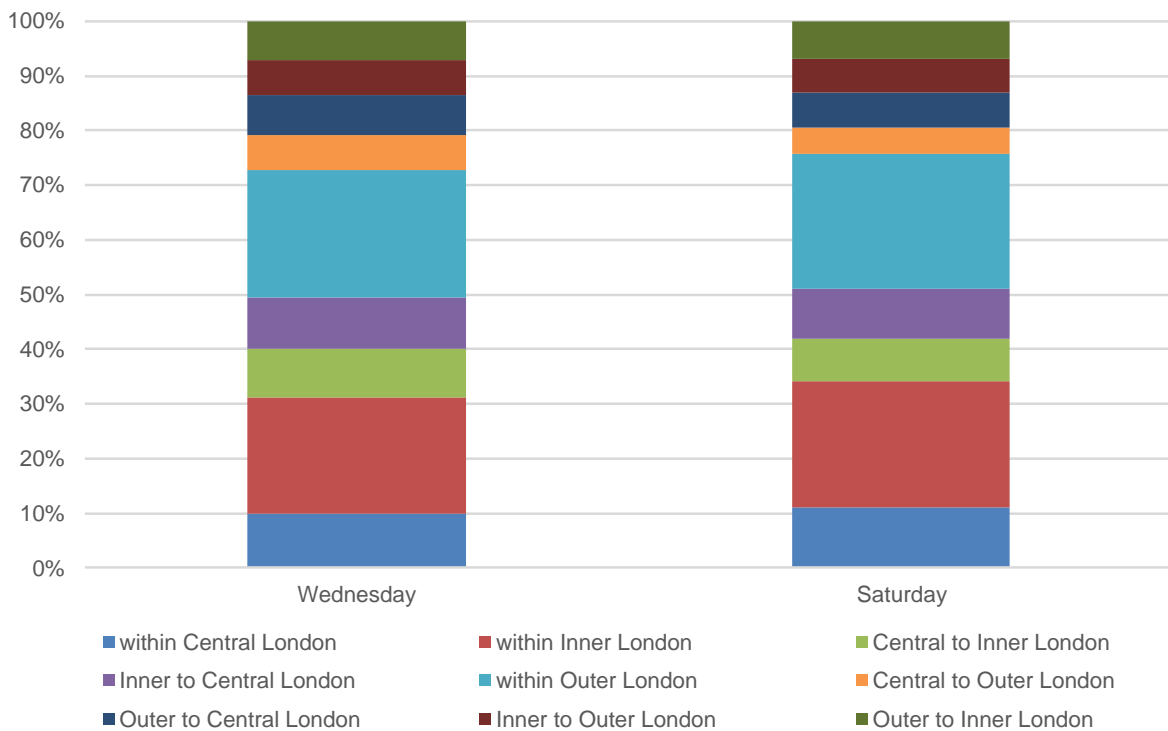
Figure 7.7: Origin and destination of London public transport journeys, Wednesday and Saturday night, 10.30pm to 4.30am, January 2018



Source: GLA Economics analysis of TfL data

Note: two-hour slots are when journey started, and ending is where this is known

Figure 7.8: Origin and destination of London public transport journeys, Wednesday and Saturday daytime, 4.30am to 10.30pm, January 2018



Source: GLA Economics analysis of TfL data

Note: two-hour slots are when journey started, and ending is where this is known

One natural conclusion is that journeys in central and inner London are more likely to use public transport than journeys in outer London¹⁴⁵. The analysis of Annex D concludes more generally that central and inner London¹⁴⁶ is more important as an origin and destination for journeys across the day with two exceptions:

- Only between 4.30am and 6.30am on the Wednesday did more than half of journeys start in outer London
- Only between 4.30am and 8.30am on the Saturday did more than half of journeys start in outer London

A quarter of all journeys on public transport start between 6.30pm and 6.30am on the surveyed Wednesday, out of 8.3m journeys over the day, and 28% of journeys start between these times on the surveyed Saturday, out of 6.4m journeys over the day.

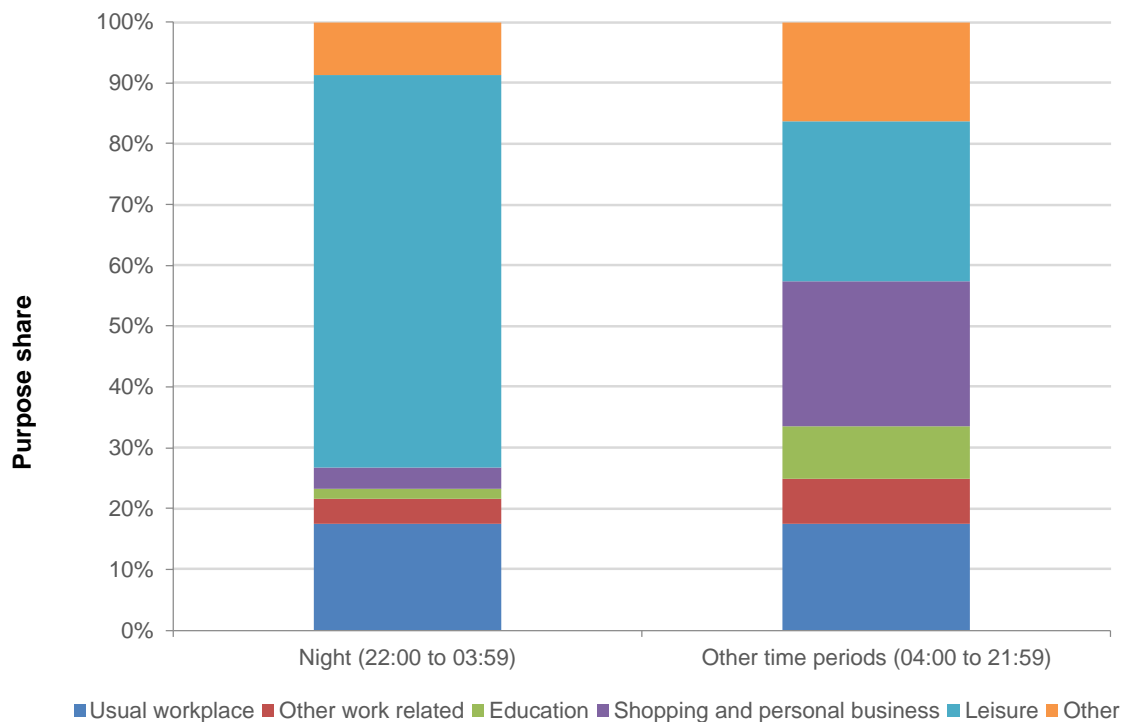
7.5 Reasons for night time journeys

Londoners are more likely to travel for leisure reasons during the night. As Figure 7.9 shows, almost two-thirds of the trips made by London residents between 22:00 and 03:59 (64%) are for leisure purposes, up from a quarter of all trips made during the rest of the day. At the same time, a sizable proportion of trips at night are still for commuting purposes – trips to the ‘usual workplace’ account for around 17% of trips at night, compared with 18% during the day. As expected, a far lower share of trips at night are for education or shopping and personal business.

¹⁴⁵ Although the source data for Figure 7.6 is not the same as that for Figures 7.7 and 7.8, so it is not strictly a like-for-like comparison.

¹⁴⁶ This analysis uses a statistical definition of London’s geography because it offers a finer breakdown than the administrative definition. Annex D provides more explanation.

Figure 7.9: Reason for travel by London residents by time of day



Source: TfL, LTDS 2016/17. Night defined here as 22:00 – 03:59

With most trips made by London residents at night occurring for leisure or work purposes, this is likely to reflect the geography of cultural and leisure activities in London, and spatial distribution of jobs. As highlighted in the Draft New London Plan, London’s night time economy is generally focused in the Central Activities Zone (CAZ) and within town centres, such as Kingston and Romford, across the city.¹⁴⁷ There is a strong concentration of jobs in the CAZ, and offices and other workplaces need servicing at all times of day. The CAZ is the main cultural centre, including theatres, concert halls and other facilities of national and international significance as well as the base for a range of cultural industries.¹⁴⁸ This point is reinforced in the 2017 London Town Centre Health Check, which identified far larger averages of night time floorspace uses in London’s International centres, particularly in the West End¹⁴⁹.

There are also differences in the gender and age profile of residents travelling in London at night. For example, women account for slightly over half (52%) of trips made during the day (04:00 to 21:59) but only 41% of trips made in London at night (which may be linked to the profile of night workers highlighted in Chapter 3). And, on average, London residents who travel at night are younger than those who travel in the day: 18% of trips at night are made by 17 to 24-year olds, compared with 9% during the day; almost half of all trips at night are made by those aged 25-44 and only 12% are made by residents aged 60 and over. Again, this is in-line with the profile of night workers being younger than average; it is also likely to be linked to the profile of Londoners who access the city’s nightlife after 22:00 (see Chapter 4 on residents and visitors).

¹⁴⁷ Mayor of London (2018) Draft New London Plan. See also Chapter 5

¹⁴⁸ Mayor of London (2018) [Culture and the night-time economy – Supplementary Planning Guidance](#)

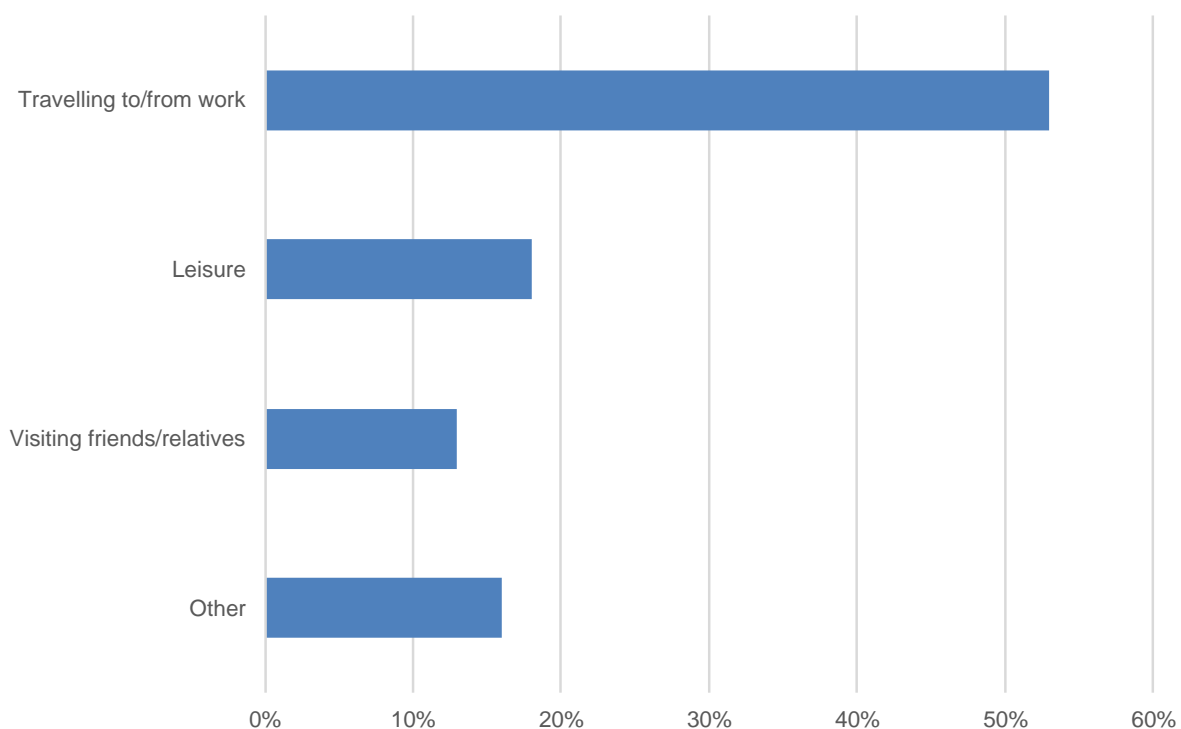
¹⁴⁹ Greater London Authority (2018) [London Plan Town Centre Health Check 2017](#), and see Figure 5.7

As set out in Chapter 4 the night time activities of visitors tend to be heavily concentrated in central London (e.g. Soho, Oxford Street)¹⁵⁰. Visitors tend not to venture to other parts of the city for nightlife activities, with far fewer going to east or south London in particular.¹⁵¹ At the same time, most visitors were positive that London’s public transport made it easy to get around the city in the evening (86%). In terms of the transport modes used by visitors after dark, the majority used the tube before midnight (81%) and/or walked (75%). The next most common modes of evening transport were buses (38%), black cabs (26%)¹⁵², and overground train (20%). Interestingly, only 14% of visitors used the Night Tube after midnight (rising to about a fifth aged 35-44) with 47% of visitors unaware of this service. This could, though, reflect its recent launch, around a year before the survey was conducted.

7.6 Night bus use

While leisure may be the main reason for travel at night, the main purpose for journeys of night bus passengers is to travel to work, and this accounts for more than half of night bus journeys, Figure 7.10. Further, over half of night bus passengers use the night bus five days a week indicating the demand for these services across the week, Figure 7.11.

Figure 7.10: Purpose of journey for night bus passengers, 2014



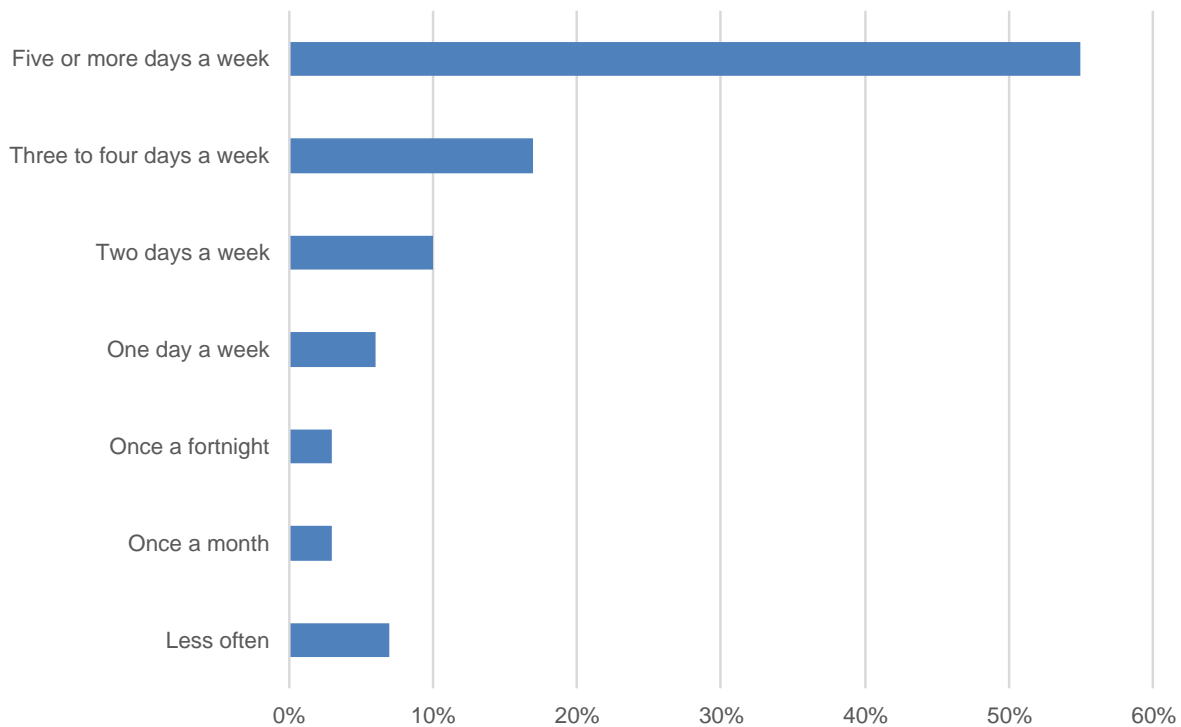
Source: TfL bus users survey

¹⁵⁰ Source material for this paragraph is from London & Partners (2017), ‘Visitor Voice London Nightlife Research’

¹⁵¹ On average 79% of respondents visited Central London for activities in the evening/night. By comparison only 25% visited West London; 18% for North London; 11% for East London; and, 9% for South London. Source: London & Partners – Visitor Voice Nightlife Survey

¹⁵² Compared with 8% who use Uber, and 4% who use minicabs

Figure 7.11: Night bus passengers – frequency of use of any London night bus, 2014



Source: TfL bus users survey

Note: Travelling to/from work includes journeys on employer business

7.7 The introduction of the Night Tube

The night tube started on Friday and Saturday nights over the period August–December 2016 on the following tube lines:

- Central line
- Jubilee line
- Northern line
- Piccadilly line
- Victoria line

TfL subsequently launched the Night Overground service in December 2017, and will review opportunities for other night time services, e.g. the Elizabeth Line, additional tube lines, DLR, and other Overground services. There is also consideration of the extension of night services to Network Rail¹⁵³.

In parallel, TfL changed some night bus routes so that they connected with stops on the night tube. TfL expected that demand for taxis and private hire vehicles would shift from central London to the ‘last mile home’ from suburban stations¹⁵⁴.

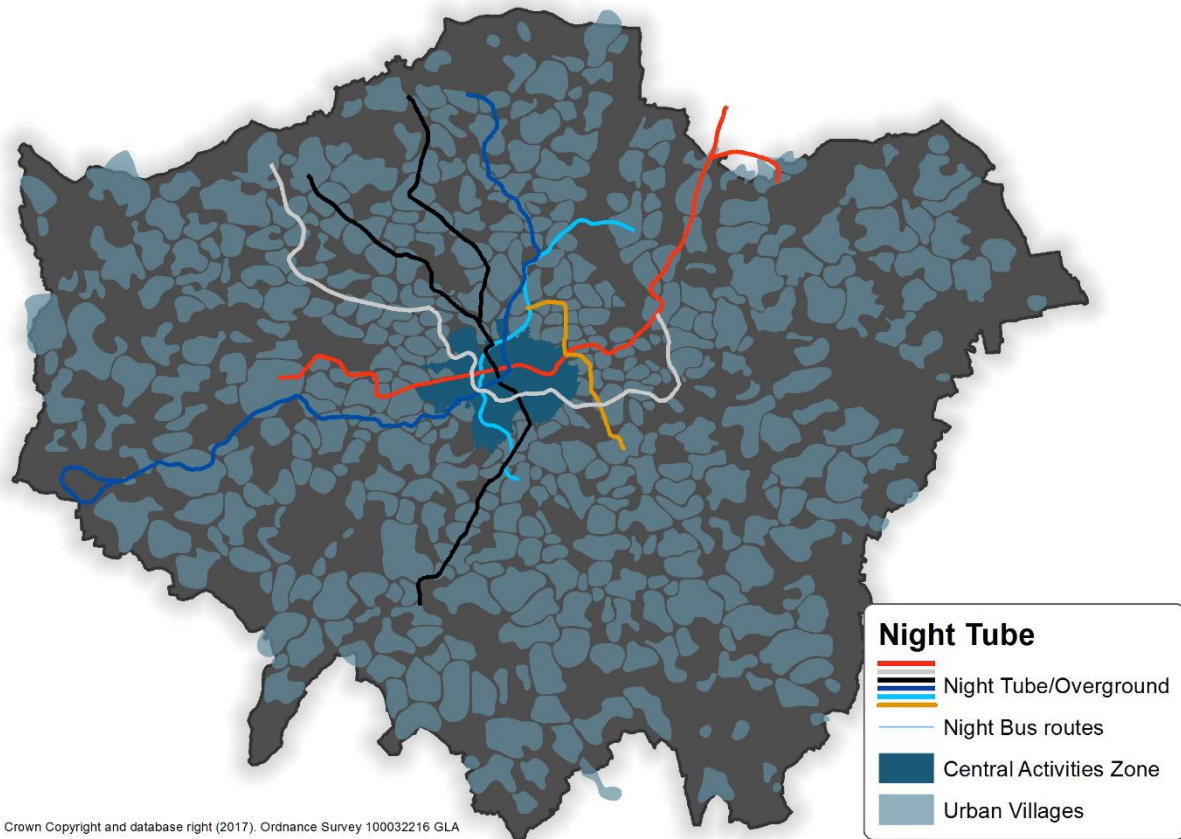
The availability of public transport in different parts of the city is another relevant factor. Map 7.1 shows a map of Night Tube and Night Bus routes alongside the urban villages within the capital. It suggests that most population centres in London are served by some form of night time public transport service (at weekends at least). However, these are often routes which run

¹⁵³ See [Trains could soon run for 24 hours, Network Rail boss says | The Independent](#)

¹⁵⁴ See [Night Tube Implementation](#)

through the Central Activities Zone and the Night Tube does not cover all of London. There are parts of the capital – particularly in outer London – which are less accessible by public transport at night.

Map 7.1: London's night time travel network and urban villages



Source: GLA City Intelligence Unit

The introduction of the Night Tube is expected to have significant economic and social benefits for London. This includes a reduction in late-night journey times (by an average of 20 minutes and, in some cases, up to an hour) and an economic boost (analysis by London First and EY suggests that the service generated £171 million for the London economy in its first year, supporting around 3,600 jobs).^{155,156} An updated report¹⁵⁷ to mark the second anniversary of the Night Tube concluded that the Night Tube helped to generate £190 million for the London economy in its second year, and would contribute £1.54 billion over the next ten years. According to TfL, there are approximately 170,000 people using the Night Tube each weekend, up from around 100,000 per weekend when the service commenced.¹⁵⁸ This is partly due to an expansion of the service over this period.

There has not been a full evaluation of the impact of the Night Tube, but the following points can be made:

¹⁵⁵ Transport for London (2018) Customer Service and Operational Performance Panel – [Night Tube One Year On](#)

¹⁵⁶ EY / London First (2018), Value of the Night Tube to London – One year on

¹⁵⁷ See [Night Tube is even bigger success than predicted, new figures show | London First](#)

¹⁵⁸ Transport for London (2018) Travel at Night. Presentation to the Night Time Commission

- Actual usage has generally been around the levels forecast – with higher than expected initial take-up¹⁵⁹
- There are on average 11 crimes a weekend on the Night Tube. There are proportionately more issues related to alcohol and anti-social behaviour, as well as higher levels of concern about safety and security than during the day.¹⁶⁰
- Noise from stations and surface lines that affects residents is an important issue with significant work undertaken to address concerns – up to mid-November 2017, TfL received 372 complaints about Night Tube noise, of which 222 complaints had been resolved and 150 were in progress or unresolved¹⁶¹.

Polling data supports the positive impacts of the Night Tube. In a representative survey of 1,000 Londoners in 2016, a majority of respondents believed that the introduction of 24-hour tube services was having a positive impact on: Londoners who need to travel during the night to get to work (81%); on London's night time economy and reputation as a 24-hour city (both 71%); and on affordable options for night time travel (65%). There were, however, mixed views on the impact on safety of travelling around London at night, while 28% of respondents felt that the Night Tube would have a negative impact on anti-social behaviour and noise levels.¹⁶²

Despite the introduction of the Night Tube GLA City Intelligence Unit research¹⁶³ accompanying this report identified two groups who considered improved night time transport to be their first or second priority to improve London at night:

- 18-24 year olds (1st priority, and sought by 52% of the age group)
- Men (2nd priority, and sought by 44% of men)

These groups are likely to want to travel around at night for leisure and work purposes respectively

7.8 Travel on London's roads at night

There is also use of London's road network in the evening and night. Indeed, road traffic levels at night have not declined in recent years, unlike during the day (which may be linked to the congestion charge).¹⁶⁴ In terms of mode share, private hire vehicles (PHVs) and taxis are relatively important to road transport in London at night. For example, on weekends, 53% of all vehicles entering the Congestion Charging Zone (CCZ) between midnight and 4am are PHVs.¹⁶⁵

¹⁵⁹ Transport for London (2018) Customer Service and Operational Performance Panel – [Night Tube One Year On](#)

¹⁶⁰ Individual reports from the British Transport Police suggest that many crimes are a result of someone asleep on a train and having property stolen, or verbal altercations that can escalate in to an assault. Source: Transport for London (2018) Travel at Night. Presentation to the Night Time Commission. For more on perceptions of crime, see: Transport for London (2015) [Travel in London: Report 8](#)

¹⁶¹ Transport for London (2018) Customer Service and Operational Performance Panel – [Night Tube One Year On](#)

¹⁶² GLA City Intelligence (2016) YouGov / Mayor of London Survey Results: November 2016. The survey has been weighted to be representative of all adult Londoners. See [Night tube survey](#)

¹⁶³ See [London Datastore](#)

¹⁶⁴ Since 2001, the number of vehicles crossing central and inner London cordons at night has remained relatively stable over the last decade or so, while the Greater London cordon has seen a 42% increase in night time vehicles. Source: Transport for London (2018) Travel at Night. Presentation to the Night Time Commission

¹⁶⁵ Transport for London (2018) Travel at Night. Presentation to the Night Time Commission

On the other hand, commercial vehicles (e.g. HGVs) are far less likely to enter the CCZ during nights and weekends – partly due to restrictions on night time deliveries as part of the London Lorry Control Scheme (LLCS). This limits disturbance from traffic during unsocial hours.

An advantage of more commercial deliveries in the evening is to reduce road congestion levels.¹⁶⁶ London Councils is investigating the impact of amending the restrictions night time deliveries, and developing pilots as part of a review of the LLCS.¹⁶⁷ According to TfL analysis, the economic cost of day time congestion in the capital is approximately £5.5 billion per year. On this basis, further analysis carried out for the Night Time Commission by London First and EY estimated that a 5% redirection of LGV/HGV traffic could lead to a £121 million reduction in the economic costs from congestion (per annum).¹⁶⁸

¹⁶⁶ London Assembly (2017) [London stalling: Reducing traffic congestion in London](#)

¹⁶⁷ London Councils (2017) [London Lorry Control Scheme Review](#)

¹⁶⁸ London First and EY (2017) 24H London: Impact on economic cost of congestion of diverting some freight to night time

8 Safety in London at night

8.1 Introduction

There are many economic, social, and cultural benefits linked to developing sustainable activity in London at night. However, some aspects of the ‘night time economy’ have often been associated with a range of potential costs or harms. This Chapter looks at the wider evidence on safety at night associated with London’s night time offer, covering data and evidence linked to:

- Crime and fear of crime
- Accident & Emergency attendances
- London Ambulance Service call-outs
- Hospital admissions¹⁶⁹

The Chapter also outlines some of the main interventions introduced by local areas in order to develop their night time offers, and considers the data available to support decisions.

8.2 Main findings

Notifiable offences are concentrated in similar areas of London during both the day and the night. This is because people tend to congregate around these areas, such as central London, town centres, and Heathrow airport, across the day. It is not possible to infer if the prevalence of crime is more likely at night because there is no source of footfall data for populations in an area at any one time.

- Police data on crime is widely available to local government public officials, but data by time of day requires a special request

While the trends in notifiable offences in London for the day and night are similar, there has been a decline in night time alcohol-related offences for all local authorities

- Around 40% of recorded notifiable offences occur at night – this proportion has remained fairly constant since 2010/11
- Recorded notifiable offences both during the night and day have been rising since 2013/14, which may, in part, be a consequence of improved reporting of offences
- Alcohol-related recorded night time offences across London fell by 51% from 2010/11 to 2017/18

While the distribution of types of notified crimes is similar over the course of a day, there is more crime, and more violent crime, during the day. Alcohol-related crime, while relatively small in numbers, is more likely to happen at night, and be serious crime

- Around a quarter of recorded crime in the day, evening (6pm-10pm), and night (10pm-6am) is violence against the person
- There were 475,350 crimes during the day, and 338,880 during the night in 2017/18

¹⁶⁹ The focus groups for GLA City Intelligence Unit opinion research, see [London Datastore](#), also identified concerns when going out of noise, litter, and anti-social behaviour, which have their own costs and harms. This Chapter does not cover these issues because of the limited available evidence. Local authorities do hold data on noise complaints, which can be made publicly available through Freedom of Information requests, see, for example [London Hotspots for Noise Nuisance Complaints \[Infographic\]](#). Potentially shifting some transport-related activity to the night might also ease another externality, congestion – the available evidence is at Section 7.7

- 57% of violent crimes against the person happen during the day
- Alcohol-related recorded offences are around 4.3% of offences during the night, and 2.5% during the day
- 70% of alcohol-related offences occur at night, and 30% occur during the day
- 50% or more of night time alcohol-related offences are violence against the person
- 13% of alcohol-related offences between midnight and 6am are sexual offences while 2-3% of all offences are sexual offences for the day, evening, or night

Disabled people, people in low income households, and women do not feel as safe in London at night compared to Londoners as a whole:

- 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

Perceptions of safety are similar for people 50 and over, and 18-24 year olds (around 20% feel unsafe), while 17% of 25-49 year olds feel unsafe.

Perceptions of the likelihood of crime are out-of-line with the actual likelihood of being a victim, and perceptions of what might make people feel safe may not be what improves safety. This is a conundrum because perceptions of safety can affect a person's interest in going out at night despite London being a safe city.

- Public perception of the likelihood of crime has been consistently higher over time than its prevalence particularly for people 35 and over
- Actions such as more visible policing, or better street lighting, are more likely to be favoured by people who might feel more at risk of crime such as women, and people over 50. These are also groups who are relatively less interested in going out at night.
- These findings are not replicated for ethnic minorities, who are more likely to go out at night because they are more likely to be working, and so more likely to experience London at night
- Secure transport and well-used streets are key drivers of public satisfaction with safety on the streets as this is more clearly linked to experiences
- 75% of London residents and visitors report feeling safe walking alone in the dark
- A higher proportion of Londoners agree the city is safe when compared with the residents of other European capitals

A review of international evidence provides a very small number of examples of evaluation of night time initiatives, and so there is not an evidence base on what works in managing the night time economy

- Specifically, there are not cost-benefit studies of the relative merits of initiatives such as Best Bar None, Business Improvement Districts, the Late Night Levy, and Cumulative Impact Zones in reducing alcohol-related harms and maintaining the night time offer

A small proportion of health service activity might be attributed to the consequences of night time activity, and hospital attendance at accident and emergency for assault is less than from events such as road traffic accidents, or sports injuries

- Around 3% of all attendances at London hospital accident and emergency departments can be attributed to road traffic accidents, assaults, deliberate self-harm, sports injuries, or is not known. Medical reasons or other accidents account for almost all attendances.
- Attendances due to assault are the highest of these groups between midnight and 6am on Friday and Saturday night
- Attendances from assault are fewer than those for road traffic accidents and sports injuries. There were, in 2016/17:
 - 9,980 attendances at night from assault
 - 17,520 attendances from assault
 - 30,430 attendances from road traffic accidents
 - 30,770 attendances from sports injuries
- 59% of assault-related ambulance call-outs are at night, and assaults account for 3.5% of all call-outs
- 63% of alcohol-related ambulance call-outs are at night, and alcohol-related incidents account for 5.9% of all call-outs

8.3 Reporting and recording of crime

Crime incidents¹⁷⁰ can be measured through surveys of individuals¹⁷¹ or through police recording. This analysis uses data from police records because it is available by types of notifiable crime at the lower level geography of local authorities. A 2014 inspection by Her Majesty's Inspectorate of Constabulary and Fire & Rescue Services (HMICFRS)¹⁷² found that a significant volume of reports of crimes from victims were not being recorded in line with Home Office Counting Rules (HOCR), and that the levels of under-recording were highest for offences involving violence against the person and sexual offences. The renewed focus on the quality of police recorded crime has led to forces taking action to improve their recording practices. ONS comparisons of series from the Crime Survey for England and Wales (CSEW), and police records, suggested that there had been a gradual erosion of police compliance with the HOCR over time, and that there has been a reversal of that trend since the year ending March 2012.

The 2014 report¹⁷³ by HMICFRS found that across England and Wales 81% of reported crimes were recorded, and that the proportion was the same for the Metropolitan Police Service. A follow-up audit in 2018¹⁷⁴ for the Metropolitan Police Service found that the proportion had risen to 89.5%¹⁷⁵.

It became mandatory for a police officer or police staff member to append a feature code or flag for alcohol-related crime on the relevant crime report in 2017. The definition now in use is "any notifiable offence (crime) where it is perceived, by the victim or any other person, that the effects of alcohol consumption on the offender or victim was an aggravating factor".

That is the effects of administrative actions have led to more complete recording of crime, and any association with alcohol consumption, which by itself would exert an upward pressure on trends. There remains a number of other reasons around recording processes to believe that

¹⁷⁰ The material in this paragraph has been drawn from [Methodological note: Why do the two data sources show differing trends? - Office for National Statistics](#)

¹⁷¹ The main national survey is the Crime Survey for England and Wales, see [Crime in England and Wales - Office for National Statistics](#)

¹⁷² In 2014 it was Her Majesty's Inspectorate of Constabulary

¹⁷³ See [Crime-recording: making the victim count - HMICFRS](#)

¹⁷⁴ See [The Metropolitan Police Service: Crime Data Integrity inspection 2018 - HMICFRS](#)

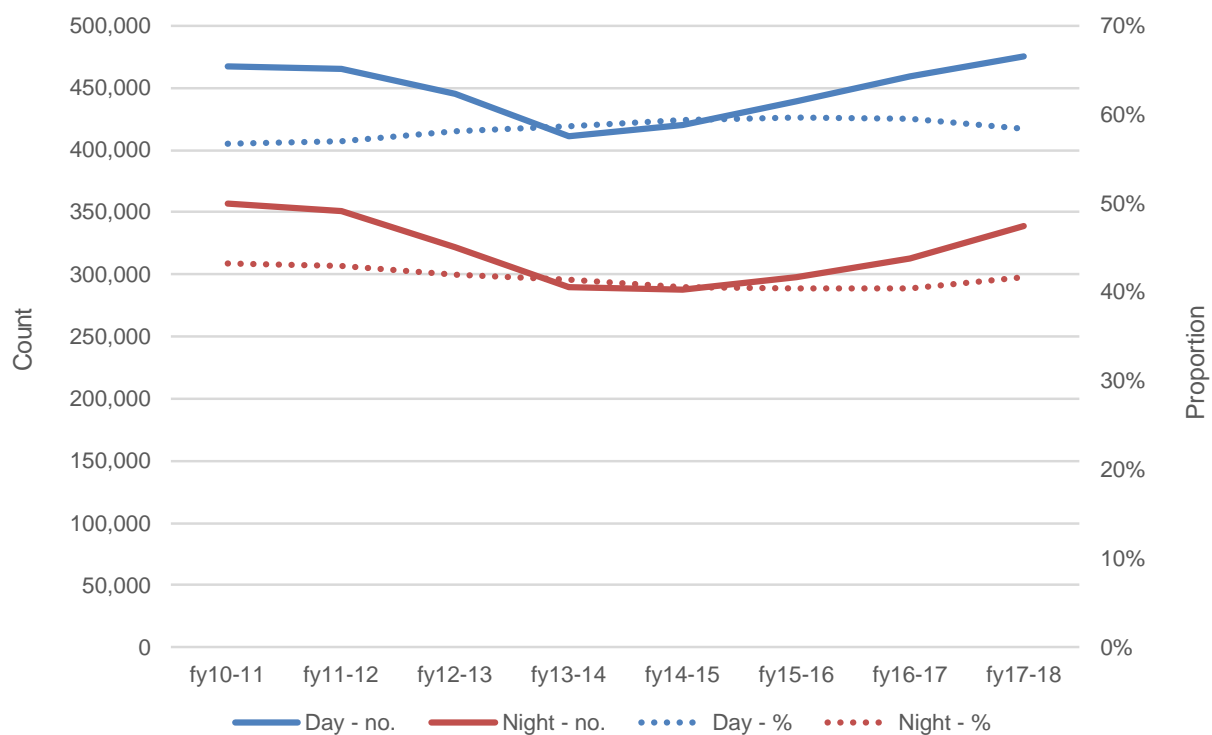
¹⁷⁵ There is no comparable updated figure for England and Wales as there is a rolling series of reviews across police services.

there is still under-recording of crimes, and for similar reasons ambulance attendances, and this is explained at Annex F. It is less clear if alcohol-related activity is under- or over-recorded as there may be cases where alcohol consumption has been incorrectly attributed.

8.4 Incidents of crime at night

338,870 or 42% of Total Notifiable Offences (TNOs) in London took place between 6pm and 6am in the year 2017/18, up from 312,340 night time offences in 2016/17 (an 8% increase). This compares to 475,350 day time offences, which rose by 4% in the last year. Looking over a longer-period, Figure 8.1 plots trends in TNOs in London between 2010/11 and 2017/18. Both day time and night time offences fell up until 2015/16 but have been rising subsequently. Nonetheless night time TNOs were still 5% lower in 2017/18 than in 2010/11, compared to 2% higher for day time offences. During this time, the proportion of incidents taking place at night has remained relatively stable, at around 40-43%.

Figure 8.1: Total Notifiable Offences in London by night and day, count and proportion, 2010/11 to 2017/18



Source: Metropolitan Police
Note: night time is 6pm to 6am

Despite the falling off in crime numbers the distribution of types of crime is similar across times of day, Table 8.1. Around a quarter of recorded crime at all times of day is violence against the person. It is relatively more common for offences with violence to be during the night (6pm to 6am). As there is more crime during the day than at night 57% of violent crimes against the person happen during the day between 6am and 6pm. Sexual offences are 2-3% of all offences at all times of day.

Table 8.1: Distribution of types of notified crime by time of day, London, 2017/18

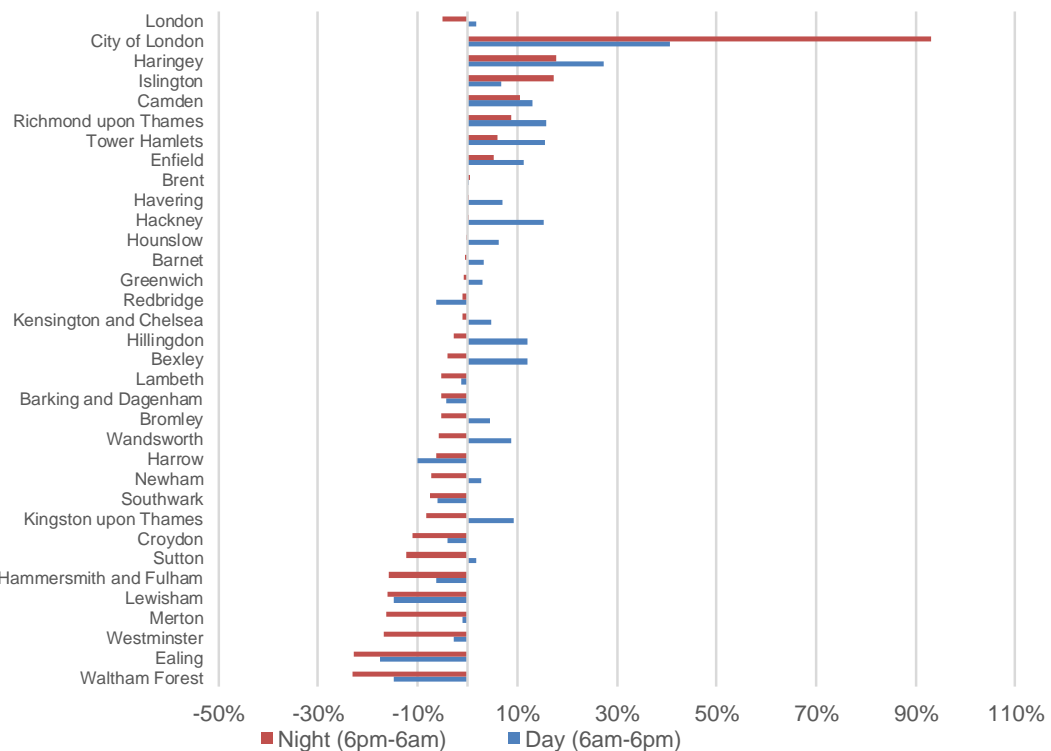
	6am-6pm	6pm-midnight	midnight-6am
Arson and Criminal Damage	6%	9%	9%
Burglary	9%	8%	12%
Drug Offences	4%	4%	5%
Miscellaneous Crimes Against Society	2%	1%	1%
Possession of Weapons	1%	1%	1%
Public Order Offences	7%	5%	4%
Robbery	3%	5%	4%
Sexual Offences	2%	2%	3%
Theft	31%	24%	18%
Vehicle Offences	11%	17%	14%
Violence Against the Person	24%	24%	27%
<i>o/w homicide or with injury to the person</i>	8%	10%	13%
<i>o/w without injury to the person</i>	15%	13%	15%
All offences	475350	208860	130020

Source: Metropolitan Police

Note: day time is 6am to 6pm, evening is 6pm to midnight, and night is midnight to 6am, absolute numbers rounded to nearest 10

Most boroughs saw a decline in the number of night time offences recorded between 2010/11 and 2017/18, Figure 8.2 – with some of the largest drops in crime at night found in boroughs with highly developed night time offers, including Westminster (-17%). While caution is needed when comparing between two single years, there were increases in crime at night in other boroughs – notably Haringey (+18%), Islington (+17%) and Camden (+11%) – though in very few cases was the increase in crime at night more pronounced than crime at day (Islington is one exception). Some local authorities have seen rises in night time crime, and falls in day time crime, and vice-versa.

Figure 8.2: Percentage change in Total Notifiable Offences by London local authority, night and day, between 2010/11 and 2017/18



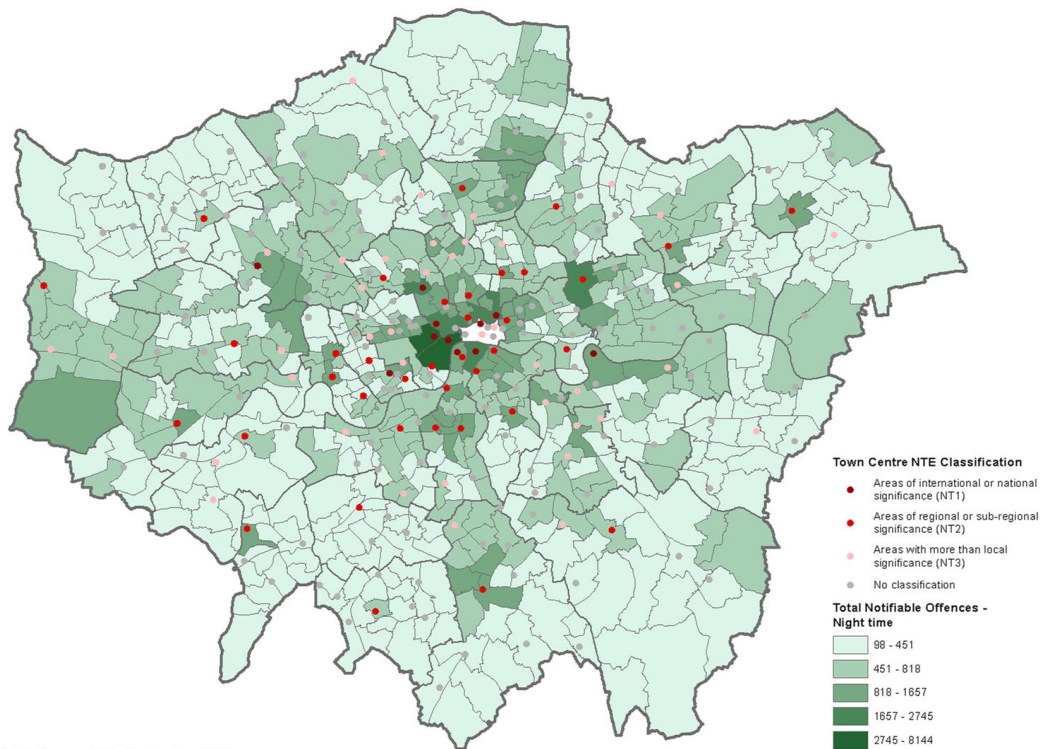
Source: Metropolitan Police

As expected, there is wide variation in the volume of offences recorded at night between local authorities. Westminster accounted for the highest share of night time offences in London in 2017/18 (7%), followed by other inner London boroughs like Camden and Lambeth (both 5%). This tracks closely with the proportion of total offences recorded in the day time.

Map 8.1 maps the location of night time offences in London in 2017/18 by ward alongside a classification of Town Centres by their 'night time economy' significance. Map 8.2 is the corresponding map for offences during the day. Several points are worth noting:

- In general, as with crime during the day, there is a positive correlation between incidences of crime at night (by ward) and the location of London's Town Centres, suggesting that agglomerations of people in a location is associated with higher crime levels.
- London's international centres – including the West End – do see a significant concentration of criminal offences at night, as do areas of regional and national significance (including Town Centres in outer London boroughs, such as Romford and Croydon).
- However, other Town Centres, particularly those without night time classifications, see fewer criminal offences both at night and during the day.

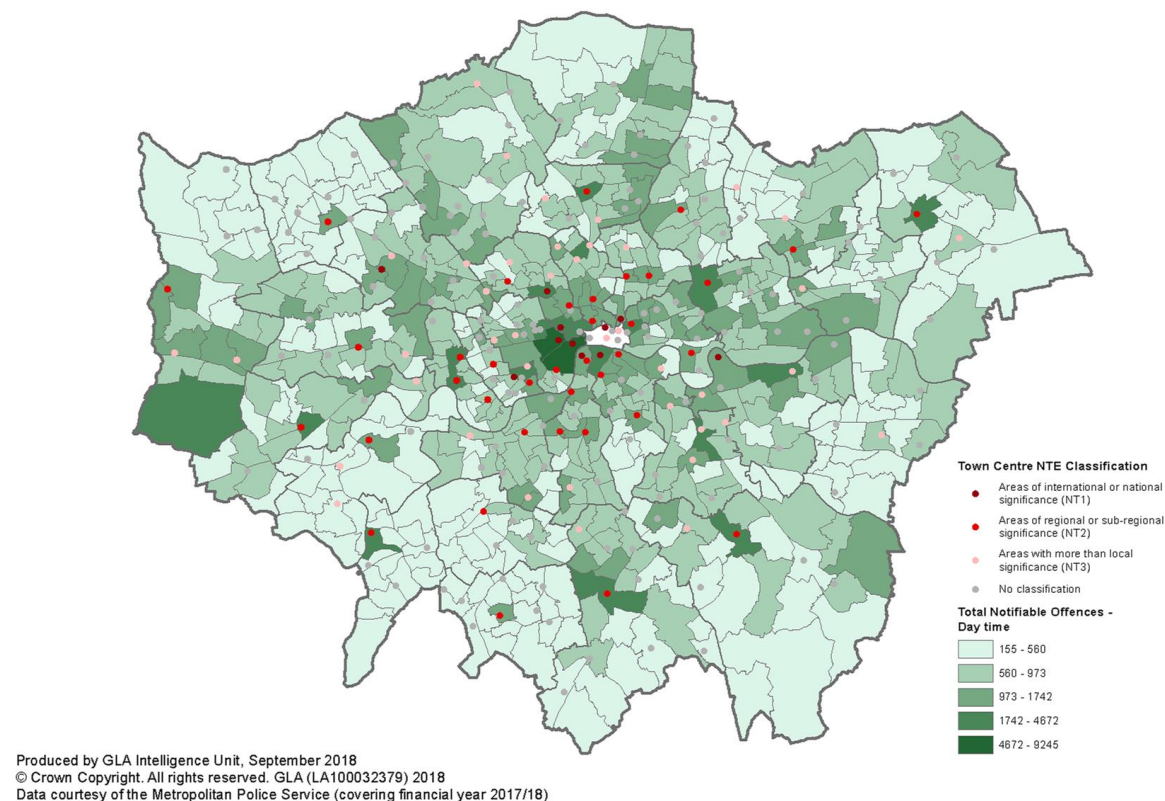
Map 8.1: Ward-based map of total notifiable recorded offences at night with Town Centre night time economy classifications, 2017/8



Produced by GLA Intelligence Unit, September 2018
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Data courtesy of the Metropolitan Police Service (covering financial year 2017/18)

Source: GLA City Intelligence Unit and Metropolitan Police
Note: night time is 6pm to 6am, and figures do not include City of London

Map 8.2: Ward-based map of total notifiable recorded offences during the day with Town Centre night time economy classifications, 2017/8



Source: GLA City Intelligence Unit and Metropolitan Police
Note: day time is 6am to 6pm, and figures do not include City of London

Box 8.1: Interpretation of night time crime data would benefit from better information on the night time population

Calculating comparable rates of offences by head of population is problematic when analysing crime and disorder associated with an area's night time offer, as it is difficult to obtain an accurate denominator. For example, areas with cultural activities attract very large numbers of visitors, from London and elsewhere. In contrast, in other parts of London those going out may largely be local residents. As a consequence, the 'night time economy' is often linked to crime or other anti-social behaviour without a clear understanding of the population in the area for the relevant time period. Suggestions for denominators to use include footfall counters in licensed premises, local authority footfall counters, or estimates of the average capacity by area at various times of the night, although there are limitations to using these. Annex D reports on movements into and out of areas of London by time of day on public transport - central areas of London are the most popular start and end points for journeys for almost all times of day, and this is where most crime occurs, although incomplete information on where bus and tram journeys end mean it is not possible to estimate accurately net movements. Going forward there may be opportunities for new sources of location data to be used to study population distribution by time; this could help to map popular night time areas and potentially help in the development of standardised crime/health statistics. See Annex B for further discussion. In the absence of better data on footfall it is not easy to reach informed judgements on the nature of any links between the 'night time economy' and crime and anti-social behaviour.

8.5 Incidents of alcohol-related crime at night

Alcohol may be purchased from an off-license or supermarket, and drunk at someone's home, or it may be drunk in a bar or restaurant. So, not all alcohol-related crime will be a consequence of attending night time activities. There is also a degree of subjectivity in linking recorded crime to alcohol consumption, as Box 8.2 explains.

Box 8.2: The link between alcohol and crime relies on subjective data

The Metropolitan Police gathers data through the Crime Report Information System (CRIS): officers place a feature code against a crime on the system if alcohol use was identified/divulged for either the victim or the offender, or if the incident is in a licensed premise. This kind of information helps to give a broad understanding of the links between the night time offer, crime and alcohol. However, a recent London Assembly report on Policing the Night Time Economy¹⁷⁶ highlights some of the issues with this source of data. It relies on subjective judgement and concerns have been raised about the quality and consistency of reporting¹⁷⁷ and the need to fully scrutinise such evidence at license hearings.¹⁷⁸ According to the London Assembly there is evidence which could indicate 'a level of under-recording in the Met's data', and not all crime is reported to the police. Until April 2017, it was not mandatory for Police Forces to identify whether offences were 'alcohol-related' using a standard definition¹⁷⁹. Annex F sets out some of the limitations with police and ambulance service crime and incident data, including alcohol-related data.

Figure 8.3 illustrates the trend in the count of incidents recorded as alcohol-related in London between 2010/11 and 2017/18. It shows that the majority of alcohol-related offences have consistently taken place between 6pm and 6am.

Despite a rise in licensed premises, there has been a downward trend in alcohol-related offences in London since 2010/11. By time period, the number of alcohol-related offences recorded at night (6pm-6am) fell by 51% from 29,590 in 2010/11 to 14,430 in 2017/18, compared to a 43% fall in day time alcohol-related offences over the same period from 10,010 to 5,710 offences (Figure 8.4, below, provides more detail at sub-London level).

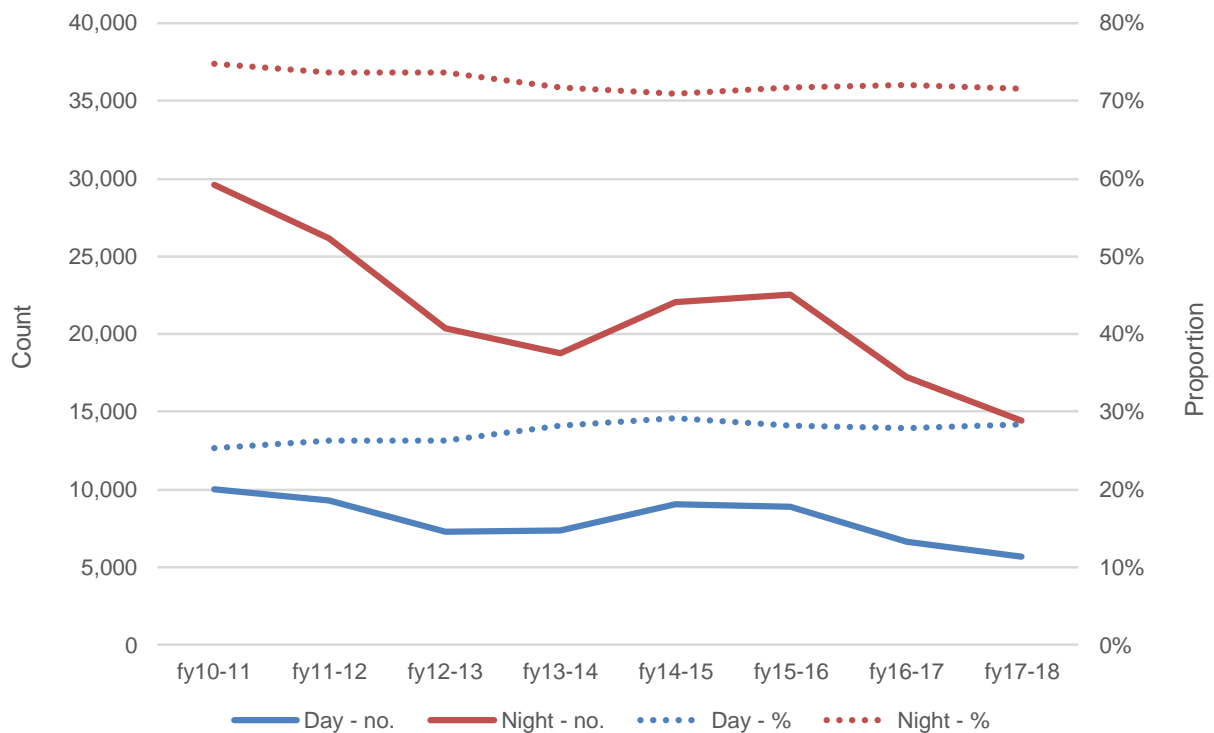
¹⁷⁶ See [Policing the Night Time Economy](#)

¹⁷⁷ London Assembly (2016) [Policing the night-time economy](#)

¹⁷⁸ House of Lords (2017) [The Licensing Act 2003: post-legislative scrutiny](#)

¹⁷⁹ See Home Office [Counting rules for recorded crime - GOV.UK](#)

Figure 8.3: Alcohol-related Total Notifiable Offences in London by night and day, count and proportion, 2010/11 to 2017/18



Source: Metropolitan Police

The Metropolitan Police recorded 20,140 alcohol-related criminal offences in the year ending March 2018¹⁸⁰, of which 14,430 occurred at night time. Alcohol-related offences are 2.5% of all offences over the entire day, and 4.3% of night time offences. 72% of alcohol-related offences occur at night, while 42% of offences occur at night.

While the total number of offences declines over the course of the day (Table 8.1 above), it increases for night time offences. There were 5,710 recorded alcohol-related offences during the day, and of the 14,430 during the night (6pm to 6am) in 2017/18, of which 6,740 were from 6pm to midnight, and 7,690 from midnight to 6am, Table 8.2.

A second contrast with all offences is that the distribution of types of alcohol-related crime changes over the day:

- It is relatively more common for offences with violence to be during the night (6pm to 6am), rising from 50% of crimes during the day to 58% between 6pm and midnight, and falling again to 52% between midnight and 6am.
- While violence against the person with injury rises from 25% during the day to 34% between 6pm and midnight, and 35% from midnight to 6am.
- And violence against the person without injury to the person declines as a proportion of crimes over the course of the day from 25% to 24% to 17%

¹⁸⁰ The recording of alcohol use in relation to offences is via feature codes on the CRIS system. Alcohol-related crimes contain one of the following feature codes: GA, alcohol consumed at scene by suspect/accused; MF, suspect/accused had been drinking prior to committing offence; MV, victim had been drinking prior to the offence

- Sexual offences also increase over the course of the day as a share of offences from 7% to 8% to 13%
- While public order offences decline as a share of offences from 15% to 10% to 6%

Table 8.2: Distribution of types of alcohol-related notified crime by time of day, London, 2017/18

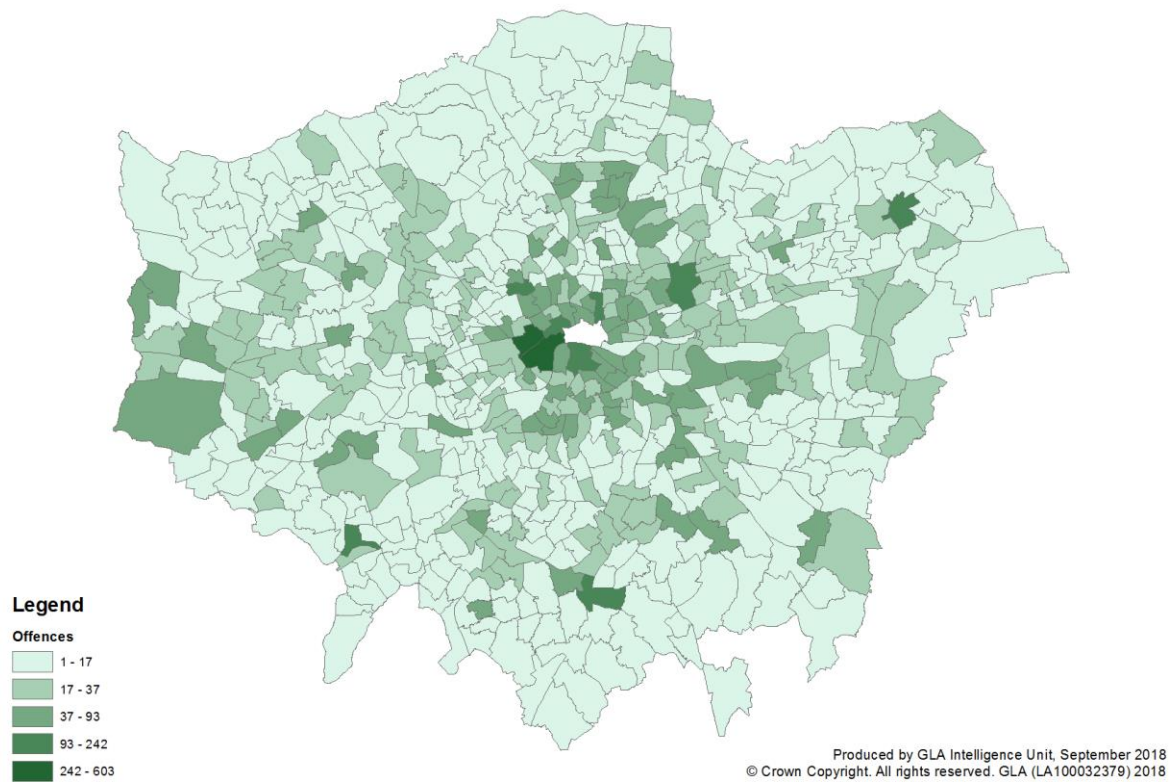
	6am-6pm	6pm-midnight	midnight-6am
Arson and Criminal Damage	8%	8%	6%
Burglary	2%	1%	1%
Drug Offences	2%	2%	3%
Miscellaneous Crimes Against Society	1%	0%	1%
Possession of Weapons	1%	1%	1%
Public Order Offences	15%	10%	6%
Robbery	3%	4%	7%
Sexual Offences	7%	8%	13%
Theft	10%	8%	9%
Vehicle Offences	1%	1%	1%
Violence Against the Person	50%	58%	52%
<i>o/w homicide or with injury to the person</i>	25%	34%	35%
<i>o/w without injury to the person</i>	25%	24%	17%
All Offences	5710	6740	7690

Source: Metropolitan Police

Note: day time is 6am to 6pm, evening is 6pm to midnight, and night is midnight to 6am, absolute numbers rounded to nearest 10

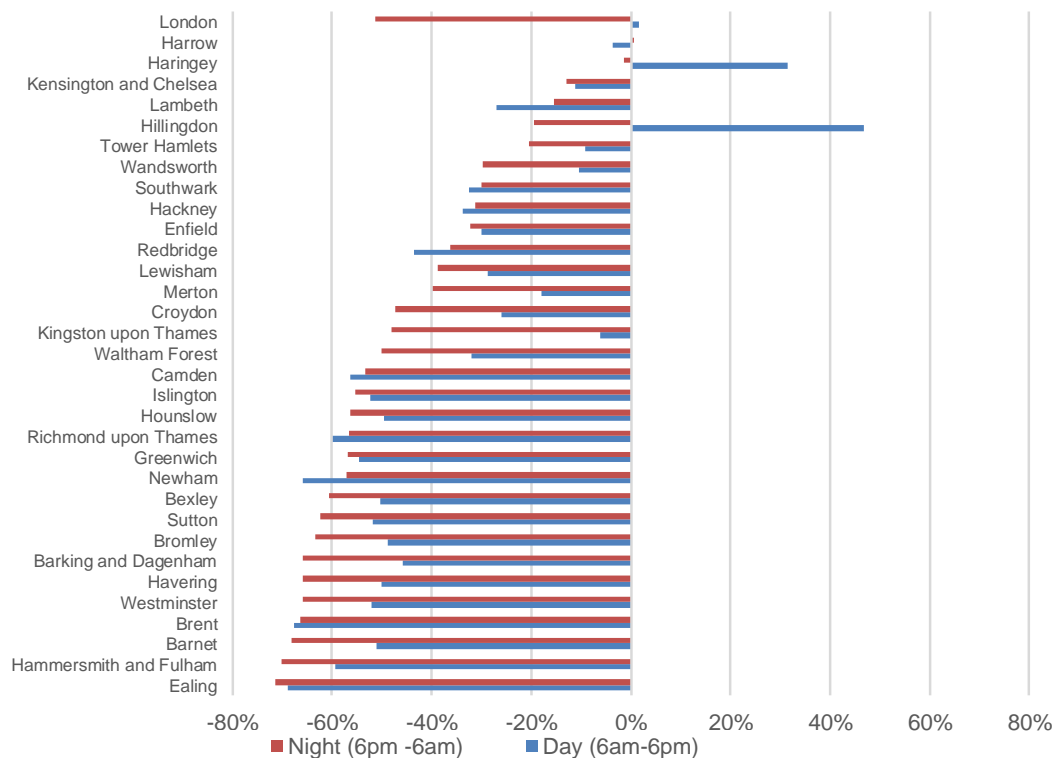
Map 8.3 shows the distributions of alcohol-related offences by London ward in 2016, while Figure 8.4 look at trends in the number of alcohol-related offences recorded night and day by London local authority. In terms of the location of alcohol-related offences, there is a significant concentration of night time alcohol-related offences in busier central areas, and less spread across London than for all night time offences. In terms of trends, the picture is less mixed than when looking at all recorded offences, with all but one local authority, Harrow, seeing a fall in the number of alcohol-related offences at night between 2010/11 and 2017/18.

Map 8.3: Ward-based map of night time alcohol-related notifiable offences by the Metropolitan Police Service in 2017/18



Source: GLA City Intelligence Unit and Metropolitan Police
Note: night time is 6pm to 6am, and figures do not include City of London

Figure 8.4: Percentage change in alcohol-related offences by London local authority, night and day, 2010/11 to 2017/18



Source: Metropolitan Police

8.6 Perceptions of crime and influences on it

Perception or fear of crime is an important issue in its own right. Viewed positively, it can motivate individuals to take healthy precautions (e.g. concealing valuables). But in more severe cases fear of crime can have a negative impact on quality of life and contribute towards tension or social isolation.¹⁸¹ While for most people fear of crime has a minimal impact on quality of life, a minority of adults (8%) report feeling ‘very unsafe’ when waking alone after dark¹⁸². Such worries can be a barrier to accessing the city at night, whether locally or further afield, and have adverse mental health impacts.¹⁸³ More broadly, fear of crime can significantly affect footfall and contribute to high street degradation.¹⁸⁴

At a national level, perceptions of likelihood of being a victim of crime fell between 2009 and 2013, and rose slightly recently, Figure 8.5.¹⁸⁵ It has remained throughout above the rate of prevalence of crime reported in the same survey. The crime rate has declined across the entire period of 2009–16.¹⁸⁶ ONS analysis suggests that perceptions vary by personal characteristics. On average, people aged 16 to 24 tend to underestimate their risk of victimisation; while people aged 35 and over tend to overestimate their risk, Figure 8.6. Fear of crime also tends to be higher in inner city areas and among black and minority ethnic communities, older people and

¹⁸¹ Curiel, R, P., et al. (2017) [Modelling the fear of crime](#)

¹⁸² Around a third of adults in England and Wales report a moderate (27%) or great (4%) effect. Source: ONS (2016) [Feeling unsafe walking home and being home alone after dark by age and sex. The effect of "fear of crime" on quality of life year ending March 2016](#)

¹⁸³ GLA Economics (2012) [Alcohol consumption in the night-time economy](#)

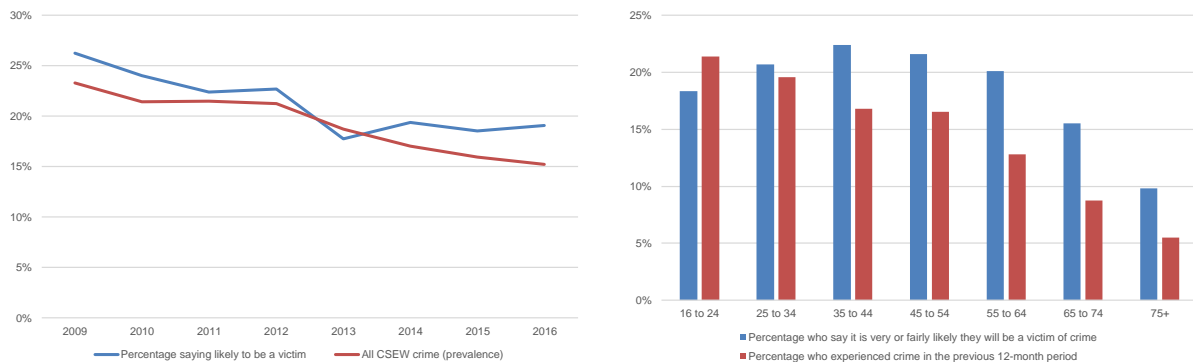
¹⁸⁴ Public Health England (2018) [Healthy High Streets: Good place-making in an urban setting](#)

¹⁸⁵ ONS (2017) [Public perceptions of crime in England and Wales: year ending March 2016](#)

¹⁸⁶ ONS (2017) [Public perceptions of crime in England and Wales: year ending March 2016](#)

women.¹⁸⁷ Subjective perceptions of crime do, however, correspond more closely to objective measures when people are asked about their local area.

Figures 8.5 and 8.6: Public perceptions of crime in England and Wales: perceived likelihood versus actual crime prevalence 2009-2016 (LHS) and by age group for 2016 (RHS)



Source: ONS Crime Survey for England and Wales

Overall, most London residents and visitors do report feeling safe in the city.¹⁸⁸ The MOPAC Public Attitude Survey (PAS) asks London residents ‘How safe do you feel walking alone in this area after dark?’ In total, 75% of respondents reported feeling safe in the first quarter of 2018. This is a slight decline on previous surveys, Figure 8.7, although seasonal effects may be part of the explanation. This is consistent with international surveys, which indicate that a higher proportion of Londoners agree the city is safe when compared with the views of the residents of other European capitals of their cities.¹⁸⁹ Similarly, in a recent online survey of 1,265 previous and potential visitors to the capital, over three-quarters (77%) said they felt/would feel safe while out in the evening in London.¹⁹⁰

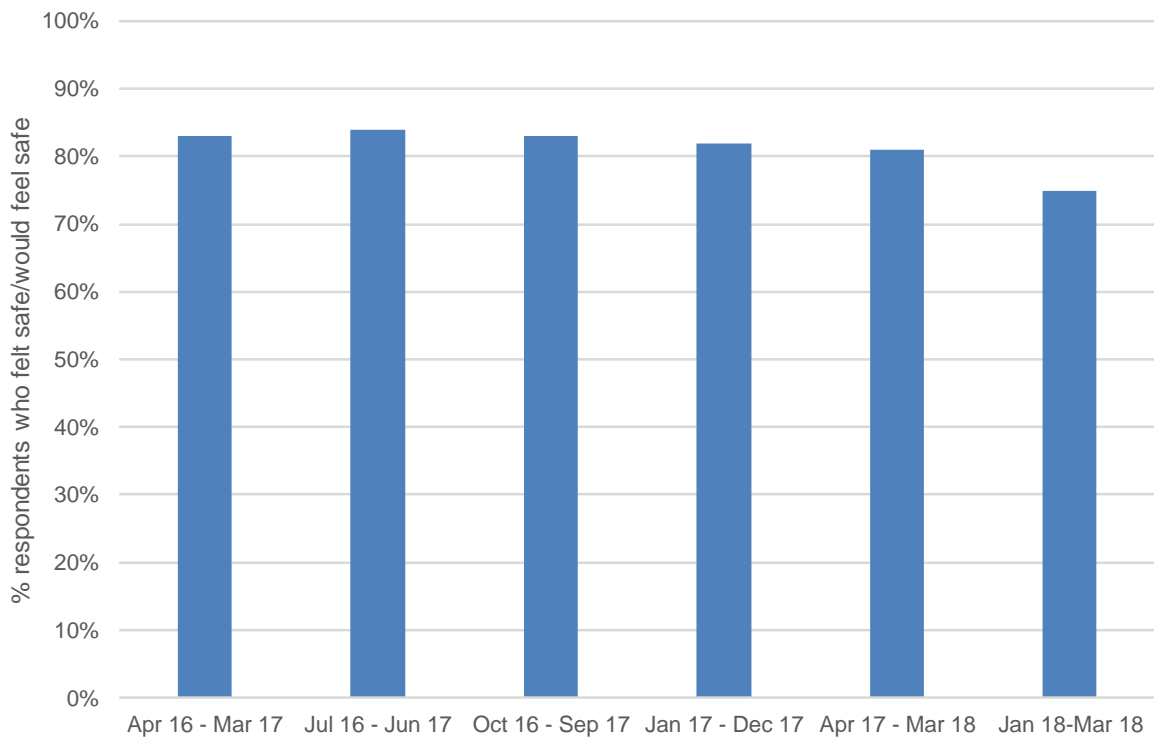
¹⁸⁷ See, for example: The Guardian (2016) [Older women feel most unsafe but are least likely to be attacked](#); Public Health England (2018) [Healthy High Streets: Good place-making in an urban setting](#)

¹⁸⁸ The PAS is based on a random sample of respondents at pre-selected addresses with a total of 3,200 Londoners normally interviewed face-to-face each quarter to yield an annual sample of 12,800 interviews.

¹⁸⁹ 81% of residents said they feel safe in London in 2015, whereas in half of EU capitals, at least 25% of respondents do not feel safe in the city. European Commission (2015) [Quality of Life in European Cities 2015 – Flash Eurobarometer 419](#)

¹⁹⁰ When asked for ideas or improvements to make London’s nightlife more appealing, only 7% of respondents suggested safety/security/more police as a main priority. Source: London & Partners (2017) Visitor Voice: London Nightlife Research

Figure 8.7: Public attitudes to walking alone in local area after dark, percentage who feel safe while out in the evening in London, various periods April 2016 to March 2018



Source: MOPAC Public Attitudes Survey Quarterly report – Quarter 4 (17/18) (Apr 17 – Mar 18)

Perceptions of safety also varies across groups, and has a correlation with willingness to go out at night. For example, 23% of women do not feel it is safe to go out at night, compared to 13% of men, and 31% of women are not particularly interested in going out at night compared to 23% of men, Figure 8.8. Not being particularly interested in going out at night, and not feeling safe are the second and third most important barriers to going out at night for women.

Figure 8.8: Barriers to going out in London at night by gender, proportions



Source: GLA City Intelligence Unit March 2018 GLA/YouGov poll

Chapter 4 provides additional information on barriers to going out at night. While 19% of Londoners do not feel safe in London at night, there are relatively few other groups, as well as women, who feel somewhat less safe than the average:

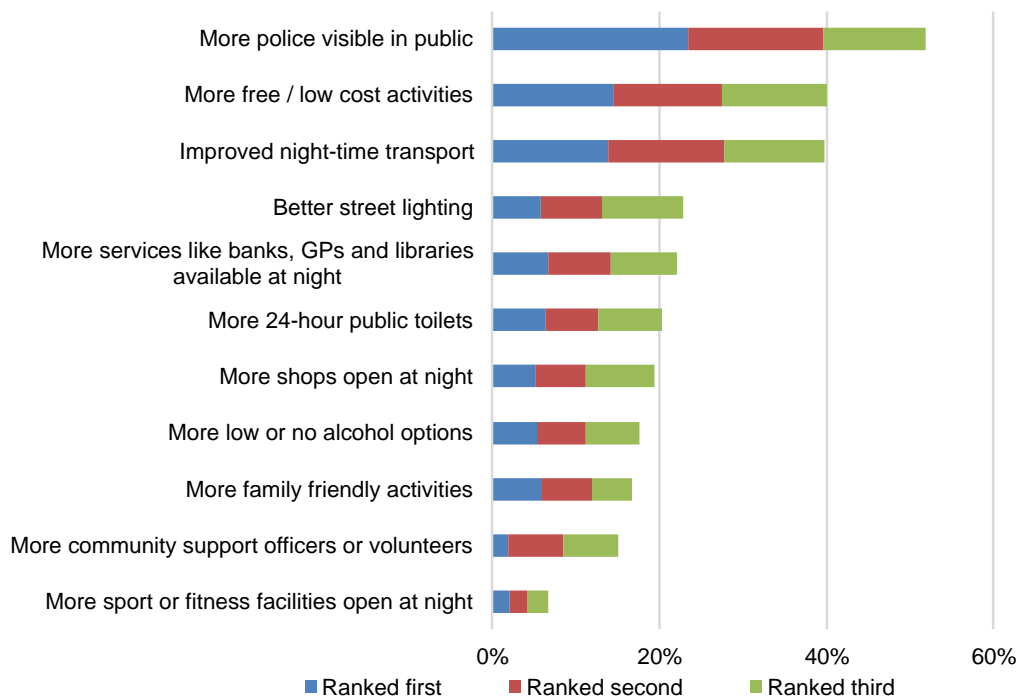
- 23% of people in households on less than £20,000 a year
- 27% of disabled Londoners, compared with 16% of non-disabled Londoners

Curiously, while people 50 and over are relatively less interested in going out at night they do not feel it is less safe to go out at night than do 18-24 year olds (around 20% in both groups feel unsafe). In contrast, 17% of 25-49 year olds feel unsafe.

In the same survey, the most popular action to improve the night time offer was for more visible police in public (52% of those surveyed chose this as one of their top 3 priorities), ahead of more cheap/free activities (40%) and better night time transport (40%), Figure 8.9. More police visible in public was the top night time priority for both men and women, as well as people 50 and over¹⁹¹.

¹⁹¹ See [London Datastore](#)

Figure 8.9: Night time priorities for Londoners



Source: GLA City Intelligence (2018) March 2018 GLA/YouGov Poll

‘Making London’s nightlife safer for women’ was also selected as the top priority in a representative poll of 1,000 Londoners in December 2016. The focus groups accompanying this research again identified safety concerns around walking home in quiet or dark residential areas, especially with poor street lighting¹⁹². The importance of better street lighting increases with the age group of the respondent, and it was the fourth highest night time priority for women. While the likelihood of being a victim of crime is greater than the probability of a crime occurring it can be rational to seek public protection.

What is less clear from these results is the extent to which the results reflect people’s fears, or are based on experience. The findings are not replicated, for example, for ethnic minorities, who are more likely to go out at night than white people, in part because they are more likely to be working¹⁹³.

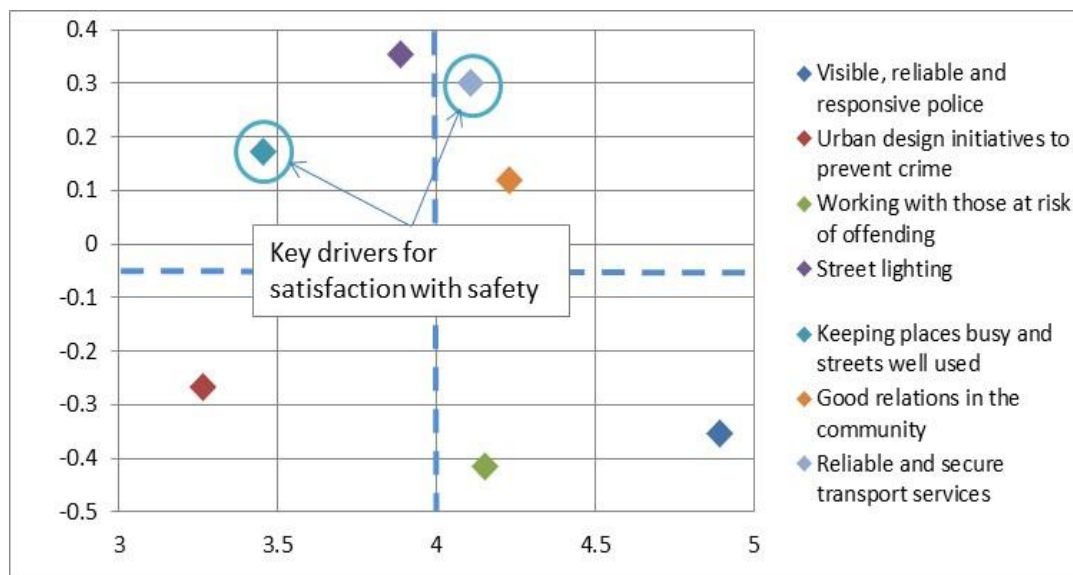
The Annual London Survey, 2015¹⁹⁴ looked into the difference between how people prioritise safety issues compared with how these initiatives made them feel. It concluded that while Londoners prioritise visible policing, good community relationships and working with at risk groups highly, regression analysis shows that secure transport and well-used streets are the key drivers of satisfaction with feeling safe, Figure 8.10.

¹⁹² See [London Datastore](#)

¹⁹³ See Chapter 3, and also GLA City Intelligence research accompanying this report [London Datastore](#)

¹⁹⁴ See [London Datastore](#)

Figure 8.10: Rank v satisfaction of safety policy issues



Source: GLA City Intelligence Unit Annual London Survey, 2015

These latter issues reflect more closely actual experiences of safety. Police presence, for example, may have more effect in altering perceptions of safety¹⁹⁵. Indeed, as recognised in a GLA Economics report, changing public realm design is another way to reduce the incidence of crime associated with the night time offer, as well as improving people’s perception of an area.¹⁹⁶ A recent Public Health England report also highlighted the benefits of Crime Prevention through Environmental Design (CPTED) as a cost-effective approach to ‘designing out’ crime around high-streets.¹⁹⁷ Its methods include: promoting local ownership; care and maintenance of the public realm; improving natural surveillance (e.g. street-lighting); and balancing ‘access control’ measures with measures to promote social activity.

8.7 Accident & Emergency attendances

In 2016/17 there were 4.1 million attendances recorded at London A&E departments¹⁹⁸. However, most of these were in the daytime with only 35% of A&E attendances in London occurring between 6pm and 6am (and only 8% of occurred from midnight to 6am) – in line with the England average. While these finding should be treated with some caution,¹⁹⁹ there is no sign of an increase in the share of A&E attendances occurring at night in recent years, Figure 8.11.

¹⁹⁵ Curiously, it may also lead to higher numbers of reported crimes, either through observation of a crime by a police officer, or because it is easier to report a crime.

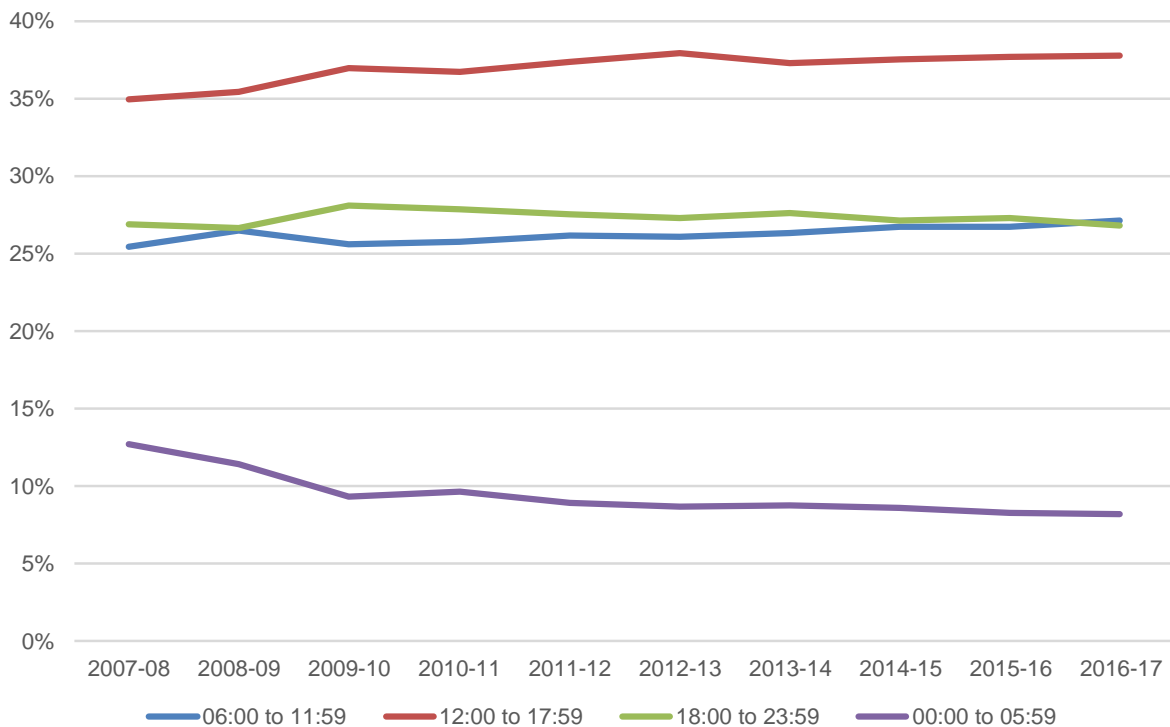
¹⁹⁶ GLA Economics (2012) [Alcohol consumption in the night-time economy: Policy interventions](#)

¹⁹⁷ Public Health England (2018) [Healthy High Streets: Good place-making in an urban setting](#) (pages 58-61)

¹⁹⁸ Hospital Episode Statistics (HES) Accident and Emergency data

¹⁹⁹ HES is not the official source of hospital A&E activity and trends may be influenced by improvements in data coverage over time

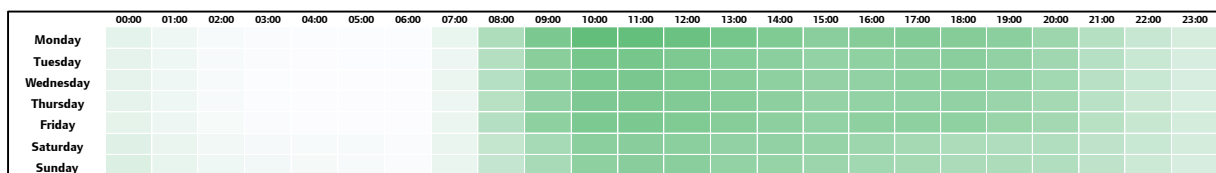
Figure 8.11: Annual A&E attendance in London, percentage of attendances by time of day, 2007/08-2016/17



Source: PHE Local Knowledge and Intelligence Service (London) analysis of NHS Digital Hospital Episode Statistics
Note: trends may be affected by improvements in data coverage over time.

Looking more closely at the timing of A&E attendances for 2016/17, in terms of days of the week, Monday is the busiest day at A&E with attendance 11% above the daily average and 8% above the next busiest day (Tuesday). Consistent with the national picture, 10am on Monday is the single busiest hour at London’s A&E departments and Thursday at 4am the quietest.²⁰⁰ Overall the time period from 6pm to 6am is relatively quiet through most of the week, Figures 8.12 and 8.13.

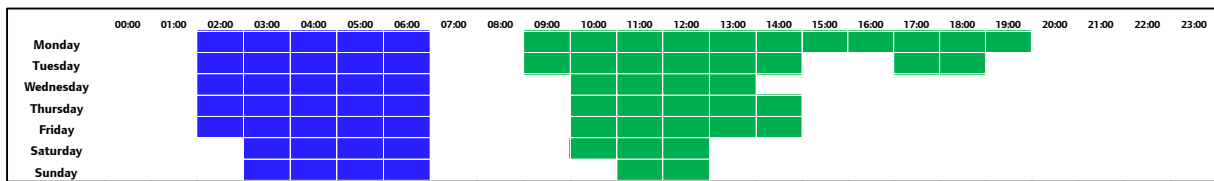
Figure 8.12: Heatmap of A&E attendance by day and hour, London, 2016/17



Source: PHE Local Knowledge and Intelligence Service (London) analysis of NHS Digital Hospital Episode Statistics
Note: Darker shading indicates higher attendance

²⁰⁰ See, for example: House of Commons Library (2017) [Accident and Emergency Statistics: Demand, Performance and Pressure](#)

Figure 8.13: Highest and lowest hours by total A&E attendance, London, 2016/17



Source: PHE Local Knowledge and Intelligence Service (London) analysis of NHS Digital Hospital Episode Statistics
Note: Green = highest 20%, Blue = lowest 20%

However, there is variation in the timing of A&E attendances depending on the reason for attendance. For assault, for example, around a quarter of A&E attendances in London occurred between midnight and 6am in 2016/17 (26%) compared to only 2% of A&E attendances for sports injuries. Figure 8.14 illustrates the profile of A&E attendances by day of the week and hour for selected reasons for attendance, excluding the broad 'Other' and 'Other accident' categories.²⁰¹ It shows that attendances due to assault tend to be higher at the weekend – peaking at 3am on Sundays – while attendances due to road traffic accidents tend to be higher in the evening (less so at the weekend). Nevertheless, it should be noted that the four selected known reasons account for only a small minority (2%) of total attendances at A&E²⁰².

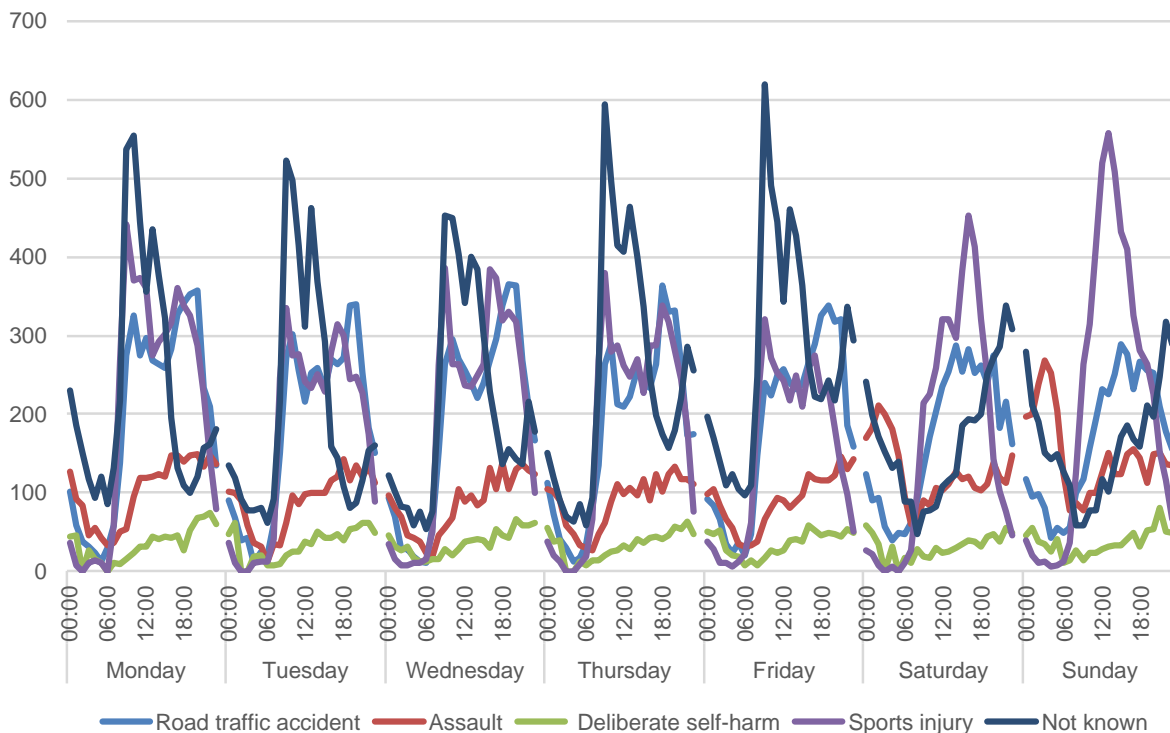
To put in perspective the demands on A&E departments from assault over the course of the year 2016/17 there were, where the reason is known:

- 30,770 attendances from sports injuries, of which 9,160, or 30%, were between 6pm and 6am
- 30,430 attendances from road traffic accidents, of which 13,170, or 43%, were between 6pm and 6am
- 17,520 attendances from assault, of which 9,980, or 57%, were between 6pm and 6am

²⁰¹ As well as the firework injuries and patients brought in dead categories.

²⁰² In 2016/17, 88% of attendances at London A&E departments were in the 'Other' category which relates mainly to reasons of a medical nature. 9% were in the 'Other accident' category.

Figure 8.14: Selected reasons for attendance by day of week and hour of week of arrival at A&E, London, 2016/17



Source: PHE Local Knowledge and Intelligence Service (London) analysis of NHS Digital Hospital Episode Statistics

8.8 London Ambulance Service call-outs

London Ambulance Service (LAS) data offers another source of evidence which is more often used to consider issues related to the night time offer. The data consists of a raw dataset that contains records for every ambulance vehicle dispatched, and is relevant for understanding broad patterns in different types of crime and disorder. A call-out may or may not lead to a hospital admission, and not all hospital admissions will be by ambulance.

As with crime data, LAS callouts occur for a very wide range of reasons. To give an indication of the LAS callouts which may be linked to activity in London's night time economy, Table 8.3 below sets out the total number of callouts, as well as callouts specifically for assaults and alcohol-related incidents in 2017. There were around 1.11 million unique LAS incidents in London in 2017, up from 1.02 million in 2015. Of these, some 43% of incidents occurred between 6pm and 6am compared to 57% during the day. There were 39,000 assault-related incidents, accounting for around 3.5% of call-outs, 59% of which were at night, while there were 66,000 alcohol-related incidents, accounting for 5.9% of call-outs, 63% of which were at night.

Table 8.3: London Ambulance Service call-outs

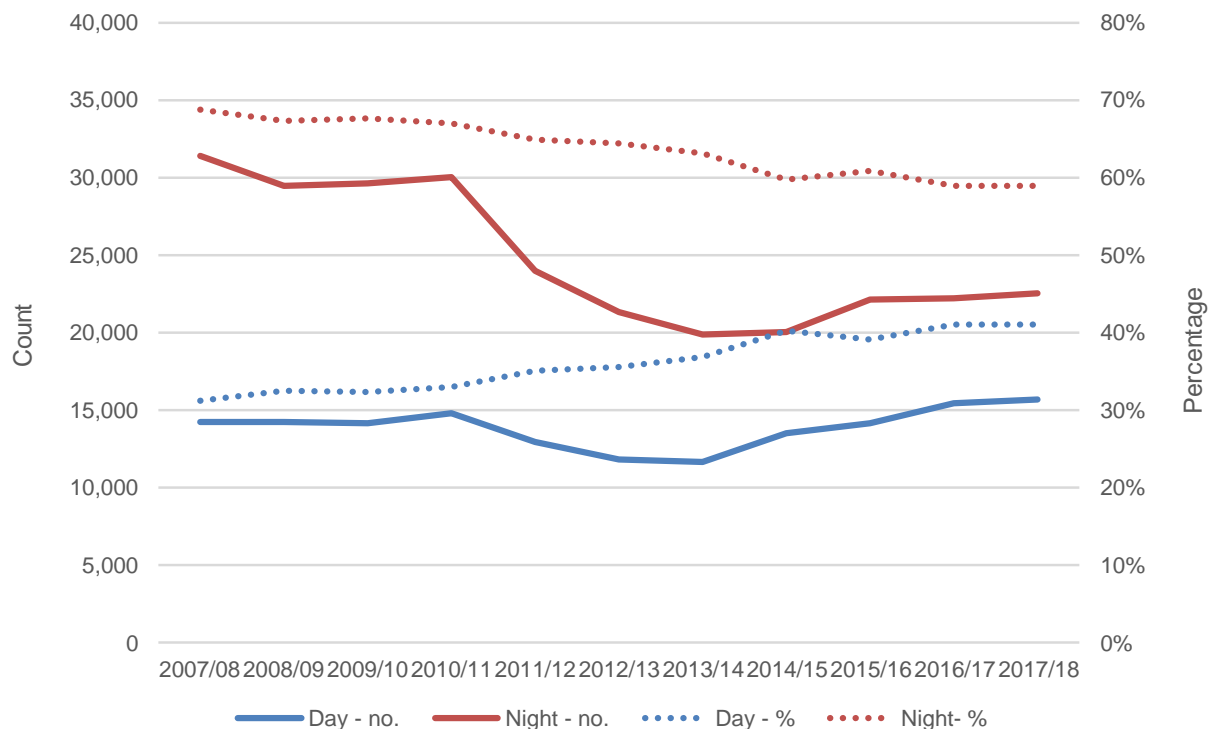
	Day	Night	% at night
Total Incidents	635520	484120	43%
Assault Incidents	16200	23170	59%
Alcohol-Related Incidents	24090	41680	63%

Source: London Ambulance Service data

Note: Day is 6am to 6pm, and night is 6pm to 6am, absolute numbers have been rounded to nearest 10

The total number of night time incidents attended by the London Ambulance Service, and where injuries suffered were as a result of violence, fell by 28% between 2007/08 and 2017/18. This decline in assault-related incidents during night time hours (6pm to 6am) compares to a 10% increase in day time incidents over the same period. Figure 8.15 illustrates the trend in the count of LAS incidents recorded as assault-related in London between 2007/08 and 2017/18 broken down by time period. It shows that the majority of assault-related callouts have consistently taken place at night, although the proportion has been falling in the last ten years.

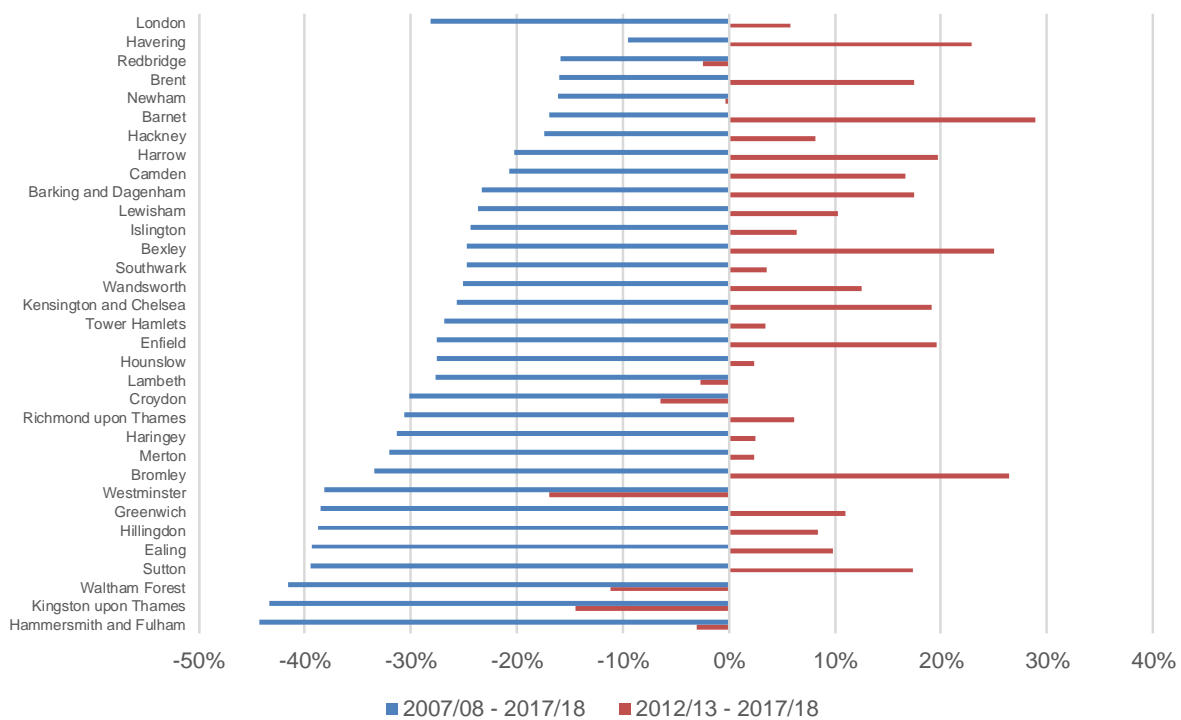
Figure 8.15: Number of assault-related incidents attended by the LAS in London by night (6pm-6am) and day (6am-6pm), count and proportion, 2007/08 to 2017/18



Source: London Ambulance Service via SafeStats

Overall, a decline in night time assault-related incidents attended by the LAS was evident across all London local authorities between 2007/08 and 2017/18. Although, as Figure 8.16 illustrates, trends in night time assaults are more mixed when looking at the period since 2012/13 alone, with most London boroughs seeing an increase in night time assaults in the last five years. Interestingly, this does not include Westminster or Lambeth – two local authorities which have seen relatively large increases in the number of licensed premises since 2013.

Figure 8.16: Percentage change in night time (6pm – 6am) assault-related offences attended by LAS by London local authority, 2007/08 to 2017/18 and 2012/13 to 2017/18



Source: London Ambulance Service via SafeStats

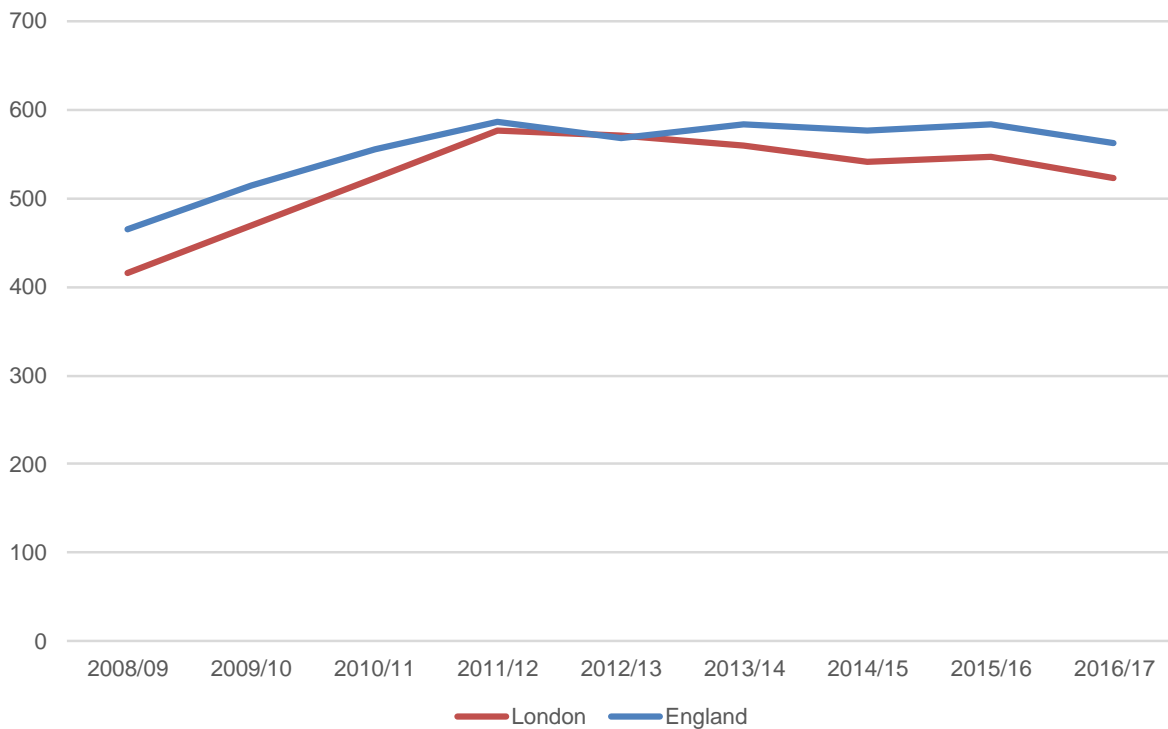
8.9 Alcohol-specific hospital admissions

Alcohol consumption has been identified as a causal factor in many medical conditions as well as increasing the risk of accident or injury.²⁰³ There is a distinction between prevalence-based estimates around all effects of alcohol misuse, and incidence-based estimates. It is possible that a hospital admission might reflect the accumulated effects of alcohol misuse, or might happen after drinking the night before, whether as a night out or not.²⁰⁴ So, alcohol-specific hospital admissions cannot be fully attributed to night time activity. In 2016/17 there were around 37,900 admissions to hospital in London where the reason for admission was attributable to alcohol (specific measure). This is 25% higher than in 2008/9. As an age-standardised rate per 100,000 population, it is though, at 523, lower than that for England as a whole at 563. Indeed, as Figure 8.17 shows – despite an increase in London’s night time industries in recent years, and London’s population – the rate of alcohol-specific admissions peaked in 2011/12 (at 576) and has fallen by 9% since.

²⁰³ NHS Digital (2017) [Health Survey for England 2016](#)

²⁰⁴ See, for example, a 2003 Cabinet Office paper for a discussion [Alcohol misuse: How much does it cost?](#)

Figure 8.17: Hospital admissions for alcohol-specific conditions, directly age standardised rate per 100,000 population



Source: PHE

However, there is still a lack of evidence on causal direction and additional factors may be at play.²⁰⁵ National data indicates a strong link between area deprivation and alcohol-specific admissions (more deprived areas have a higher rate of admissions), suggesting that local inequalities need to be taken in account. Other studies have suggested a limited association between outlet density and local residents' alcohol use. Overall, there is a need for more context-specific understanding of the relationship between population, outlet mix and alcohol-related harms to inform policy development.²⁰⁶ For example, there are cases where a small number of individuals in a locality account for a disproportionate number of the admissions to hospital for alcohol-specific reasons, which would not be immediately apparent from aggregate statistics.²⁰⁷

8.10 Measures to manage the night time offer

The following sections briefly highlights some of the main interventions used to manage and promote local night time areas in the UK and the evidence associated with these. For a more comprehensive review of the (wide) range of policies that can address different causes and consequences of alcohol-related problems in the 'night time economy', see GLA Economics (2012)²⁰⁸.

²⁰⁵ Gmel et al. (2015) Are alcohol outlet densities strongly associated with alcohol-related outcomes? A critical review of recent evidence

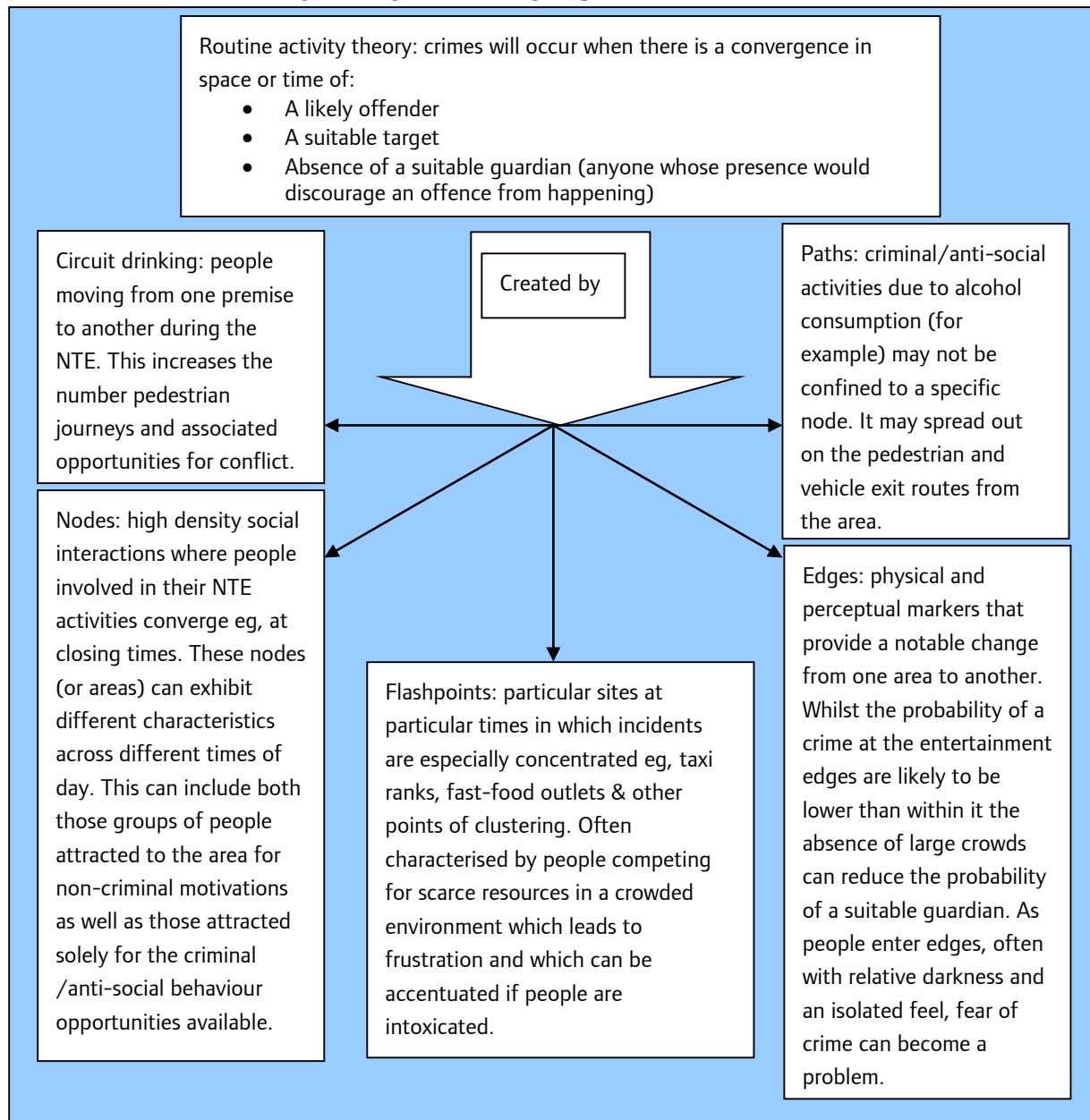
²⁰⁶ Ibid.

²⁰⁷ In the LB of Islington, for example, 7% of all individuals admitted for alcohol-specific reasons were responsible for 31% of all alcohol-specific admissions and 27% of all bed days in 2014/15. Source: LB Islington (2017) [Alcohol-specific hospital admissions in Islington](#)

²⁰⁸ See [Working Paper 55: Alcohol consumption in the night-time economy | London City Hall](#)

This research also provided a routine activity theory to identify high-risk crime situations, reproduced in this paper for convenience at Box 8.3, and which might inform the design of policy interventions. The theory suggests that in order for a crime to occur at least three conditions must be met: there must be an offender, a suitable victim (this could be an individual or an object e.g. a street) and there must be an absence of a suitable guardian against crime (this can be anyone whose presence would discourage the behaviour from occurring)²⁰⁹. There are five situations which can contribute to the convergence of these three factors (and therefore the occurrence of a crime), as shown in Box 8.3.

Box 8.3: Routine activity theory to identify high-risk crime situations



Source: GLA Economics research, *Alcohol Consumption in the Night-Time Economy*

²⁰⁹ Lawrence E Cohen and Marcus Felson, *Social Change and Crime Rate Trends: a routine activity approach*, *American Sociological Review*, vol 44 no 4 (August 1979), pp588-608

Although local authorities in London operate under the same overarching policy framework, variations in local context mean there are very different approaches taken to managing the night time offer (through licensing policy, for example). There is no ‘one size fits all’ solution to developing local night time offers. Nonetheless, while context specific, there is evidence that the ‘intensity’ of local policies can have positive social impacts – e.g. on population health²¹⁰ – without (necessarily) reducing the vibrancy of the local night-offer.

8.10.1 Cumulative Impact Policies

Where local authorities can provide evidence that the number of licensed premises in an area is compromising the promotion of licensing objectives, they may choose to introduce a cumulative impact policy (CIP). CIPs allow local authorities to limit the number or type of licence applications granted in areas where the number or density of premises is having a demonstrable impact on licensing objectives, most commonly the prevention of crime and disorder.²¹¹

Based on the data available, there were 69 cumulative impact areas in London as at 31 March 2017. This is slightly lower than in 2014, but higher than in 2012. The number of CIPs in place reported in any given local authority ranged from none to eight. Despite having a relatively lower number of licensed premises relative to adult residents it was Sutton (8) and Newham (8) that had the highest number of CIPs in place, followed by Islington (6).

According to the Home Office, the result of CIP is often to improve the ‘quality’ of license applications coming forward.²¹² However, as the data above suggests, there is ‘considerable variation in the means and the extent to which councils use licensing policies to attempt to mitigate the health and social harms of alcohol misuse’.²¹³ The Home Office’s Modern Crime Prevention Strategy included a commitment to put CIPs ‘on a statutory footing, to strengthen the ability of authorities to control the availability of alcohol and reduce alcohol-related crime and disorder, as well as providing industry with greater clarity about how they can be used’.²¹⁴

Islington developed a Licensing Strategy, and CIP, for its Cumulative Impact Zones introduced in January 2013. An evaluation concluded that the initiative reduced alcohol-related harms without either negatively impacting on the overall night time economy in Islington or the ability of alcohol retailers to operate if they meet the conditions required²¹⁵. More information is available at Annex C.

This contrasts with the Sydney lock-out laws, also discussed at Annex C. While evaluation evidence also indicates that this initiative reduced alcohol-related harms, the impact of change

²¹⁰ de Vocht et al (2016) Measurable effects of local alcohol licensing policies on population health in England

²¹¹ CIPs may relate to premises licensed to carry on any licensable activity, including the sale of alcohol for consumption on or off the premises, and the provision of late-night refreshment, including late-night fast food outlets. The effect of adopting a CIP is to “create a rebuttable presumption” that applications for licences which are likely to add to the existing cumulative impact will normally be refused (or subject to certain limitations) unless the applicant can demonstrate that there will be no negative cumulative impact on the licensing objectives. See: House of Commons Library (2017) [Alcohol: cumulative impact policies](#)

²¹² Home Office (2016) Putting Cumulative Impact Policies on a Statutory Footing

²¹³ de Vocht et al (2017) The intervention effect of local alcohol licensing policies on hospital admission and crime: a natural experiment using a novel Bayesian synthetic timeseries method

²¹⁴ Home Office (2016) [Modern Crime Prevention Strategy](#)

²¹⁵ See [Islington Licensing Policy Review 2017 - cumulative impact assessment](#) and [Evaluating the impact of a Cumulative Impact Zone Policy to reduce alcohol-related harms in Islington Local Authority - NIHR School for Public Health Research](#)

on cultural vibrancy for businesses and individuals going out at night was not assessed. There is some evidence that there may have been adverse effects, and the initiative remains contentious.

8.10.2 Other schemes

There are a variety of other schemes that aim to address wider impacts related to night time activity and which are often used to ensure that the premises which prosper from the 'night time economy' contribute towards additional costs that can occur. This section highlights a selection of findings from recent evidence.

- The **Late Night Levy** (LNL) provides licensing authorities with a discretionary power to raise money from late-opening alcohol suppliers to go towards policing and managing their night time economy. The levy has, though, seen only modest take-up since its introduction (in 2012). As of March 2017, three licensing authorities in the capital had levies in place – Camden, Islington and the City of London.^{216,217} Where implemented the levy has been used to fund a range of initiatives, including extra police or community/security officers, and projects to benefit those socialising at night.²¹⁸ However, several challenges have been raised in relation to the LNL – including a lack of flexibility in how funds raised by the levy are used and concerns about unfairness in terms of which businesses pay.²¹⁹ The government has subsequently announced several amendments to the relevant legislation, introducing more scope to target the levy in areas where the night time offer places demands on policing, as well as measures to boost transparency.²²⁰
- There are also a wide range of **voluntary and partnership-based schemes** which are aimed at promoting and improving conditions in local night time economies. For example, Business Improvement Districts (BIDs) are partnerships between local authorities and local businesses which provide additional services or improvements to a particular area. This includes, in some cases, specific late-night levies on businesses active at night.²²¹ A number of boroughs have also put in place town centre strategies, often working with BIDs, town centre managers and other stakeholders. However, most town centres – around 78% – in London do not have a strategy.²²² Voluntary schemes, such as Best Bar None and Purple Flag, also aim to promote responsible management and operation of alcohol licensed premises through partnership working.
- In the UK it is an offence to knowingly sell alcohol to, or purchase alcohol for, a drunk person.²²³ However, there are concerns that this legislation is not being properly enforced (partly due to the difficulties of defining drunkenness).²²⁴ One recent study conducted in Liverpool (in 2013) found that 84% of alcohol purchase attempts by pseudo-intoxicated actors in pubs, bars and nightclubs were successful. This is thought to exacerbate problems with pre-loading, that is drinking at a private residence before going out, and the excessive

²¹⁶ The amounts raised by the LNL was £292,800 in Camden, £401,000 in Islington and £448,000 in the City of London.

²¹⁷ The London Borough of Hackney also introduced a late night levy in November 2017, citing local evidence showing a 'clear correlation between the locations of late-night licensed premises and incidents involving robbery, violence and theft'. See: <https://www.hackney.gov.uk/late-night-levy> [accessed 25 April 2018]

²¹⁸ Home Office (2016) [Impact assessment on changes to the late night levy](#)

²¹⁹ Given the balance of evidence, a recent report by a House of Lords Committee concluded that the LNL had 'failed to achieve its objectives'. Source: House of Lords (2017) [The Licensing Act 2003: post-legislative scrutiny](#)

²²⁰ Home Office (2016) [Modern Crime Prevention Strategy](#)

²²¹ For example, in some BID areas, such as Reading, there is a further 2% 'night time levy' for licensed premises which open after midnight (on top of the standard levy). Nottingham has a night time economy business improvement district.

²²² Greater London Authority (2018) [London Plan Town Centre Health Check 2017](#)

²²³ Regulated under Section 141 and 142 of the Licensing Act 2003

²²⁴ House of Lords (2017) [The Licensing Act 2003: post-legislative scrutiny](#)

drunkenness and anti-social behaviour often linked with it. A subsequent intervention called 'Drink Less Enjoy More' aimed to address the over service of alcohol to drunk people in Liverpool City Centre, including training and awareness raising measures. The project was evaluated by Liverpool John Moores University using a team of 'pseudo-intoxicated' student actors to simulate drunken customers, and appeared to show a large reduction in the proportion of successful alcohol test purchases by these actors (down by 26%), but with less of an impact on addressing wider impacts.²²⁵

Annex C includes international evidence on initiatives pursued across countries. There are a range of interventions which can reduce alcohol-related crime, which are not related to reducing alcohol consumption.

8.11 Using data to support management of the night time offer

There remains a need for caution when attributing specific developments in London at night – e.g. crime and/or LAS callouts – to the 'night time economy'. For example, the link between crime and population centres can be partly explained by 'routine activity theory' which suggests that more crimes will occur when there is a convergence in space or time of: a likely offender; a suitable target; and the absence of a suitable guardian.¹ Although other factors – including alcohol availability – may further contribute to the risk of crime or health problems, the absence of accurate night time population data means it is difficult to identify particular links between the number of premises, alcohol consumption, and incidences of crime and LAS callouts without more detailed understanding of the specific context.

Most harms associated with the economy at night are also influenced by a multitude of factors and several other features specific to different night time areas are important to consider. This includes outlet density and mix, the way in which individual premises are run, public realm design, and availability of night time transport. In turn, for policies to improve night time areas it is vital that local-specific issues are well understood, both in terms of:

- (a) what the problems are and how they are manifested (e.g. is it crime at night or just fall/injuries? does it originate from only a few number of premises? etc.);
- (b) what the drivers of the problems are (e.g. is it excessive alcohol-consumption and/or other characteristics of visitors? – or is it because there are 'too' many visitors or premises?).

Finding these out will require collection of a large range of area specific data and collaborative working across agencies. GLA Economics has previously set out some guidance on data that could be collected to estimate the size of the problems²²⁶.

There is good evidence that a public health approach to gathering and using data on violence can contribute to efforts to reduce violence at the population level, in particular through the Cardiff model²²⁷. In this approach reception staff in emergency departments collect data about violent incidents from patients presenting with assault-related injuries, including location, time and day, and weapon used. The data is anonymised, analysed and combined with police intelligence, and shared with a group of representatives from many agencies such as local government, police, licensing regulators, licensed businesses, ambulance services and mental

²²⁵ Centre for Public Health Liverpool John Moores University (2016) [Evaluation of the Liverpool Drink Less Enjoy More intervention](#)

²²⁶ See [Working Paper 55: Alcohol consumption in the night-time economy | London City Hall](#)

²²⁷ Local Government Association (2018) Public health approaches to reducing violence

health support services. Along these lines, the **London Information Sharing to Tackle Violence** (ISTV) programme is a two year programme co-ordinated by MOPAC and funded through the Home Office Innovation Fund.²²⁸ The programme seeks to develop more effective data sharing between Community Safety Partnerships, health and other partners, using a similar approach to collating and analysing anonymised emergency department data to inform community safety strategies and resourcing decisions across partner agencies.

Local authorities, and other public bodies, face a significant set of challenges in coming up with a set of policies which meet the desire for an improved night time offer with potential management of adverse consequences while balancing the conflicting interests of residents and people going out. The analysis of this Chapter, and elsewhere in this paper, indicates that there are significant gaps in the evidence base to support those policies:

- It is difficult to interpret the findings of existing cost-benefit studies of London night time activity, because they do not specify a counterfactual, that is what would have happened in the absence of a particular initiative – see Annex E
- A review of international evidence provides a very small number of examples of evaluation of night time initiatives, and so there is not an evidence base on what works – see Annex C
 - Specifically, there are not cost-benefit studies of the relative merits of initiatives such as Best Bar None, Business Improvement Districts, the Late Night Levy, and Cumulative Impact Zones in reducing alcohol-related harms and maintaining the night time offer
- There is almost no data on some of the adverse consequences of the night time offer around noise and litter
- There is no systematically collected, and publicly available, data on footfall, or expenditure when out, to monitor the importance of the night time offer to a local area – see Chapter 4 and Annex B for a discussion of the opportunities of anonymised big data

²²⁸ See <https://www.london.gov.uk/what-we-do/mayors-office-policing-and-crime-mopac/data-and-statistics/information-sharing-tackle-violence>

Annex A: Methodology to define a night time category of industries and occupations

A.1 Purpose

There is no established definition of a night time category of industries and occupations. The Mayor of London through his work to build a 24-hour London²²⁹ defines the night time as between 6pm and 6am, a timeframe which has also been used elsewhere.^{230,231,232} One of the main findings of Chapter 3 is that there are individuals across all industries or sectors and occupations working at night. At the same time there is interest in having a more tightly drawn definition to understand the characteristics of the category of industries and occupations where night time activity is more significant. This Annex sets out the approach adopted in reaching that definition. It has been developed with the help of the expertise of members of the Night Time Commission Data and Research Group. The analysis of Chapters 3, 5 and 6 uses this definition using a number of data sources. Depending on the available data findings are reported for the category as a whole, or the industries or occupations components.

A.2 Data sources and classifications

The LFS is the only ONS survey which has information on working hours for individuals or businesses. So, it is the source which has been used to define the night time category. Other sources, namely the ASHE, and the IDBR have been used for the analysis of characteristics of participants and businesses where night time activity is more significant. These surveys do not have information on working patterns, and so do not distinguish between day time and night time activity.

A.2.1 Labour Force Survey

The LFS is a study of the employment circumstances of the UK population. It is the largest household study in the UK, providing the official measures of employment and unemployment. The sample currently consists of around 38,000 households in Great Britain every quarter, representing about 0.15% the GB population (with around 1,500 households in Northern Ireland added to the sample allowing analysis of data relating to the UK). The population of London is around a seventh of the Great Britain population²³³. The survey is administered in four calendar quarters per year. Participants are asked about their usual pattern of work (coded as variables USUWRK1-3) in Quarter 2, April-June each year. As this is not a core question, responses rolled forward from previous quarters mean some individuals were not asked about their usual pattern of work. Our estimates from the LFS are therefore adjusted to exclude those participants (see LFS User Guide²³⁴ for more details on the imputation process), and consequently information on working hours is only available for a part of the overall sample population.

The variables USUWRK1-3 ask respectively about the respondent's usual pattern of work:

- Whether usual or not usual to work during the day
- Whether usual or not usual to work during the evening

²²⁹ See [Building a 24-hour London | London City Hall](#)

²³⁰ TBR and MAKE with Long View Partners, 'Sydney Night Time Economy: Cost Benefit analysis', 2011.

²³¹ TBR for Westminster City Council, 'Evening and Night Time Economy Cost Benefit Analysis', 2015.

²³² Working paper 55: [Alcohol consumption in the night-time economy](#), 2012

²³³ See [Population estimates for the UK, England and Wales, Scotland and Northern Ireland - Office for National Statistics](#)

²³⁴ See [Labour Force Survey – user guidance - Office for National Statistics](#), volume 1 for imputation process, and volume 3 defines the variable

- Whether usual or not usual to work during the night

As there are three separate questions it is possible to ascertain whether an individual is working in each of the day, evening and night. The LFS, though, does not use fixed definitions of evening and night time, and it is for individual respondents to decide how they respond – individuals in similar circumstances may respond differently. In this analysis respondents who say they work during either the evening or night, or both, are considered to work during the night as defined as being between 6pm and 6am.

The analysis supporting the definition of night time industries and occupations has been conducted on the basis of responses by all workers, and so includes both employees and the self-employed.

A.2.2 Annual Survey of Hours and Earnings

ASHE provides information about the levels, distribution and make-up of earnings and hours paid for employees in all industries and occupations across the UK. Businesses are surveyed in April of each year and are asked to provide information on employees who fall within a 1% sample of the HM Revenue and Customs (HMRC) Pay-As-You-Earn (PAYE) Register taken in January of the same year (with follow-up surveys to capture those employees who change jobs or join the labour market between January and April). The final ASHE dataset typically covers around 180,000 jobs from around 60,000 responding businesses. ASHE only covers employees and therefore excludes the self-employed. The selection of available personal characteristics is also more limited than other sources, such as the Labour Force Survey.

This is the source which has been used in Chapter 3 for analysis of employees earning below the London Living Wage²³⁵, as the earnings data comes from employer administrative records, rather than being self-reported by individuals as is the case for the LFS. For this reason, it is considered by the ONS to be more precise than data provided in the LFS²³⁶.

Alternative measures of low earnings are the National Living Wage (NLW) and National Minimum Wage (NMW), and the ONS does publish statistics on jobs earning below these levels for employees using ASHE²³⁷. The ONS makes a number of points about its estimates:

- The NMW and NLW apply for different age groups, and the rates of the NMW and NLW are different
- This is not a measure of non-compliance with the minimum wage legislation, as it is not always possible to determine from the survey data whether an individual is eligible for the minimum wage. For example, if employees receive free accommodation, employers are entitled to offset hourly rates
- In 2016 the new NLW rate only came into force a few weeks before the ASHE reference date²³⁸ (13 April). Some employers do not implement the new rates immediately when they come into force, but implement them at a later date. Some of these employers may not have implemented the new NLW rate until after the ASHE reference date

²³⁵ See [\[ARCHIVED CONTENT\] Low Pay methodology and guidance - ONS](#)

²³⁶ See [A guide to sources of data on earnings and income - Office for National Statistics](#)

²³⁷ See [Low pay in the UK - Office for National Statistics](#)

²³⁸ This is the date for which all employers should provide a snapshot of their business and who works in it

As it is not straightforward to interpret estimates of jobs earning below the NMW or NLW, and because the survey sample of such jobs is small²³⁹ GLA Economics has not provided earnings analysis for night time industries and occupations using this measure.

A.2.3 Inter-Departmental Business Register

The IDBR is a comprehensive list of UK businesses used by government for statistical purposes. It covers 2.6 million businesses in all sectors of the UK economy, other than very small businesses (those without employees and with turnover below the tax threshold) and some non-profit making organisations. The two main sources of input are the Value Added Tax (VAT) system from HMRC (Customs) and Pay As You Earn (PAYE) from HMRC (Revenue). Additional input comes from Companies House, Dun and Bradstreet and ONS business surveys.

This is the data source which has been used for industry workplace and employment analysis in Chapters 5 and 6.

A.2.4 Industry and occupation classifications

The Standard Industrial Classification²⁴⁰ (SIC) is the system used to classify all industries in the UK. Each digit of the SIC code provides a progressively more granular industry classification: section (first letter), division (two digits), major group (three digits), class (four digits) and subclass (five digits).

The Standard Occupational Classification²⁴¹ (SOC) is the system used to classify all occupations in the UK. Similarly, each digit of the SOC code provides a progressively narrower occupational classification: major occupational group (first digit), sub-major group (two digits), minor group (three digits), and minor unit (four digits).

The LFS and ASHE provide information by SIC and SOC, while the IDBR records industries by SIC. LFS data is self-reported, while employers are the source for ASHE and IDBR data. As described in Chapter 3, using the LFS, we observe that individuals work during the evening and night in every industry and occupation of the economy. As such there can be no perfect definition of night time activity in terms specific industries and occupations, since many people working in these industries and occupations also do so during the day.

A.3 Methodology to define the night time category

GLA Economics produced analysis at 2, 3 and 4-digit SIC and SOC for jobs in London and the UK of the numbers of workers, and proportion of night time workers for each industry and occupation. It did this for the April-June 2017 LFS. The number of surveyed individuals for some of these groups was small, and so there is a very broad range around the corresponding central estimates for the actual population. For this reason, estimated values for groups with fewer than 30 sample observations have been ignored as they were not considered to be robust.

GLA Economics used the expertise of the Night Time Commission Data and Research Group to identify criteria to determine night time industries and occupations, and their categories.

The group reached the following conclusions:

²³⁹ The ONS estimates that there were 362,000 jobs with pay less than the NMW or NLW held by employees aged 16 and over in April 2016, which constituted 1.3% of UK employee jobs

²⁴⁰ See [UK SIC 2007 - Office for National Statistics](#)

²⁴¹ See [SOC 2010 - Office for National Statistics](#)

- 2-digit SIC and SOC level data was too broad brush to be valuable
- 4-digit SIC and SOC level data had too few observations across too many detailed sectors and occupations even at a UK level to support the identification of a broadly-based night time industry and occupation definition
- There were too few observations at 3-digit SIC and SOC level to support definitions based on London level data, and there was a risk of incomplete coverage

The first cut of a definition of night time industries and occupations was industries or occupations for which there were sufficiently large sample sizes of night time workers (that is 30 or more), and where 29% or more of UK workers in the detailed industry or occupation worked at night. 29% has been used as the cut-off because 29% of workers in the UK are night time workers.)

A number of sense checks on this definition were performed:

- Comparison with known existing definitions of night time industries²⁴²
 - These were the London Plan Supplementary Planning Guidance²⁴³, studies by London First/Ernst and Young²⁴⁴, and Westminster City Council research²⁴⁵
 - The proposed definition encompassed these other definitions except for five elements in the London Plan Supplementary Planning Guidance²⁴⁶. In each instance there were insufficient observations to apply the UK-level data-based criterion above
- Comparison with 3-digit SIC and SOC level data for London where sample sizes were robust
 - These all came within the first cut of the definition

The adopted definition for night time industries is the first cut definition plus the five elements described in the London Plan guidance.

The adopted definition of night time occupations is the first cut definition.

An advantage of adopting a UK-based approach to the definition is that it can be, and has since been, adopted more widely; the ONS has recently produced analysis for the Greater Manchester Combined Authority on this basis.²⁴⁷ It provides directly comparable estimates of night time industries with the analysis for London in this paper.

The remaining step was to group the industries and occupations into meaningful sub-categories of:

- Cultural and leisure activities
- Activities which support night time cultural and leisure activities
- 24-hour health and personal services

²⁴² There are no known other definitions of night time occupations

²⁴³ See [Culture and the Night Time Economy Supplementary Planning Guidance](#)

²⁴⁴ 'Value of the Night Tube One Year On' | London First/EY, and [Night Tube is even bigger success than predicted, new figures show | London First](#)

²⁴⁵ See [Evening and Night Time Economy | Westminster City Council](#)

²⁴⁶ Industry groups added include: 47.8 Retail sale via stalls and markets, 55.3 Camping grounds, recreational vehicles & trailer park, 55.9 Other accommodation, 59.2 Sound rec & music publishing activities, and 91.0 Libraries, archives, museum & culture

²⁴⁷ Office of National Statistics, ['Night Time Economy businesses and employees in Greater Manchester boroughs and MSOAs, 2001 to 2017'](#), 2018

- Activities which support wider social and economic activities

Chapter 3, at Section 3.5, provides the coverage of these categories, and their characteristics in terms of the working population.

Annex B: Opportunities for new urban data to give a more complete picture of London's night time offer

B.1 Introduction

This paper summarises a wide range of evidence on the range of economic (and other) activity taking place in London between 6pm and 6am. However, as noted already, there are shortcomings with the data currently available. The GLA City Intelligence Unit hosted a workshop in January 2018 on new sources of urban data for the night time economy with the Fraunhofer Institute. This discussed several sources of urban data which could be applied to give a more complete picture of London's economy at night, thus helping to inform policies to develop the capital as a 24-hour city.

B.2 Potential sources of urban data

The key data used in this report mainly come from public sector datasets, including business, crime and health data from the ONS and other public sector agencies. Data from GLA City Intelligence surveys also informs our understanding of the capital's night time offer and the profile of its users. As Annex D begins to show, TfL transport data can give a more detailed (albeit partial) picture of population movements by time of day/night.

However, looking ahead, there are likely to be increasing opportunities to leverage new sources of urban data to provide further analysis of economic (and other) activity at night. For example, private sector data – including data from mobile phone networks, payment card data, or other transport data (e.g. private taxi and licensed private hire providers) – could help to understand who accesses London's economy at night and what their consumption patterns are. The Mastercard data referred to in Annex C is an example of how this can be done. Online content is often private but could offer insight about Londoners' preferences in different parts of the city. While strengthening partnerships with key industries can provide additional insights. Further, online data generated as a by-product of day-to-day use of the internet ('digital exhaust') may also be of use: crowdsourced review platforms such as TripAdvisor offer detailed indications of the quality of venues across London; sentiment analysis of publicly available social media (e.g. Twitter) could be developed to give an indication of Londoners' reaction to night time related events or policies.

B.3 Potential uses of urban data

In turn, there are several ways for these emerging sources of urban data to give a more complete picture of London's economy at night. Four examples are proposed for consideration:

1. *Patterns of consumption* – there is incomplete information on the economic value of London's economy at night. Publicly available economic and business data is usually not time sensitive and there are challenges in attributing activity by time. Thus, economic analyses often rely on proxy measures, e.g. reflecting the share of night workers, which does not allow for more detailed geographic or sectoral analysis to be undertaken. Data from payment cards and/or app-based payment systems could offer localised insights into retail spending and consumption patterns – offering a more timely and in-depth picture of London's economy at night. This might also be valuable in evaluating the economic impact of specific policies or programmes aimed at promoting London as a 24-hour city.
2. *Population mapping* – a key barrier to understanding the pros and cons of different parts of London's economy at night is gaps in population/footfall data for the city's

night time areas. Resident population data is unsuitable for contextualising data on the impacts of night time activity, since night time populations are different from day time populations. This can affect policy decisions and impact assessments – for example, the ‘night time economy’ is often linked to crime or other antisocial behaviour without a clear understanding of the population in the area for the relevant time period. New sources of (aggregated) location data – e.g. from mobile phones or travel networks – could be used to study population distribution by time; this could help to map night time areas and travel patterns and potentially help to standardise crime/health statistics.

3. *London’s night time demographic* – the Mayor of London is committed to widening access to ensure all Londoners can participate in the city’s night time offer. But, while official statistics and GLA survey data provides some evidence on London’s night time workers and users, there are gaps in our understanding of who does and does not access different services at night more broadly. Anonymised data from social networks or payments cards could be used to indicate who does (and does not) participate in activities in London at night, when and where. There may be further scope for projects or relevant late-night venues (e.g. museums and galleries) to collect data from night time visitors in order to track levels and profile of visitation and inform programmes accordingly.
4. *Patterns of night time activity* – there is limited data on travel patterns at night, where people go at night, and changes over time. TfL has good data on travel patterns on public transport, but data on bus and tram destinations is incomplete. There is no other publicly available data on journeys, or footfalls in areas. Similarly, there is data on trends in workplaces, where people are more likely to work at night, and their numbers of employees although actual numbers of night time workers are not known. It would be helpful for planning purposes to have more definitive information on trends in where people are at night.

B.4 Next Steps and Partner Input

In this context the GLA City Intelligence Unit is continuing to investigate the potential to access new sources of urban data to inform our analysis of London’s economy and urban development.²⁴⁸ There are, though, several caveats to be considered when exploring new urban data sources, particularly since these data sources are generally designed for a different purpose. This includes:

- *Opening up data* – to enable the use of new urban data there is a need for public and private sector partners to make data accessible and affordable. This includes making data available in a standardised format and providing sufficient information about the data (metadata) to allow accurate interpretation. Even then, there is a need to analyse and evaluate which data sources are of sufficient quality and have long-term value.
- *Data collection* – in some cases sources of urban data may be incomplete or not fully reliable for the purpose proposed. Adapting data collection processes or investing in technologies may be required to make data useable for analysis. For example, there are potential benefits from combining datasets to gain insight in to the economy at night (e.g. footfall, crime and venues data), but this depends on the skills/technologies available.

²⁴⁸ The London Office of Data Analytics (LODA) has been set up to strengthen London’s approach to data management and sharing. This aims to ensure that the value of data can be maximised and we can advance the use of data science in the capital. The GLA is also exploring opportunities to work more closely with partner organisations in this area.

- *Effective data governance* – privacy is a vital issue for the collection, storage and processing of personal data collected by the public and private sectors. Access to anonymised personal data can be valuable for understanding, for example, the profile of people who access services or urban spaces; but there is a need for transparent policies and robust security measures to facilitate data sharing in an appropriate manner.

Annex C: International evidence on the night time offer

C.1 Introduction

So far, this paper has shown a detailed analysis of the current economic situation of London at night. However, how can these findings be interpreted relatively in the international context? What is the available evidence in other international cities comparable to London? How are these cities performing nowadays in terms of promoting its night time offer? This Annex summarises the available evidence on these questions. It brings together what is known for London and elsewhere, and identifies some of the measurement issues in understanding the night time offer.

The structure of the Annex is:

- London seen as a global leader
- International comparisons of night time offer
- International night time initiatives
- Evaluation evidence of international initiatives
- Conclusions

The main report provides more contextual information on visitor numbers.

C.2 London seen as a global leader

With more than 8.7 million inhabitants²⁴⁹ and more than 20 million of international overnight visitors every year²⁵⁰, London is the second largest urban area in the European Union after the Paris region²⁵¹ and the second most visited city in the world after Bangkok. People come to work in, live in, and visit London because they perceive the city as a global leader in many aspects - during the day but also during the night, opting to develop their personal and professional projects in the UK capital rather than elsewhere. The following international rankings corroborate this image of global leadership where London:

- Ranked the leading global city –out of 30 world cities– in the PWC Cities of Opportunity Index (2016)²⁵². This index is based on the following variables: “intellectual capital and innovation”; “technology readiness”; “city gateway”; “transportation and infrastructure”; “health, safety and security”; “sustainability and natural environment”; “demographics and liveability”; “economic clout”, “ease of doing business”, and “costs”. Singapore and Toronto followed London in this ranking.
- Ranked 2nd in the Global Financial Centres Index (2018)²⁵³, an index produced by the China Development Institute and Z/Yen Partners which studies 110 financial centres in the world. Key areas of the index are: “business environment”, “financial sector development”, “infrastructure factors”, “human capital”, “reputation”, and “general factors”. New York and Hong Kong followed London in this index.

²⁴⁹ Source: ONS, ‘Annual Population Survey, mid-year population estimates’ (2016).

²⁵⁰ Source: [MasterCard Global Cities Index \(2017\)](#).

²⁵¹ Eurostat reports that Greater London had a population of 8.6 million in 2015, and the Paris region had a population of 9.8 million, see [Eurostat - Data Explorer](#)

²⁵² [Price Waterhouse Cooper’s Cities of Opportunity Index \(2016\)](#).

²⁵³ [Global Financial Centres Index \(2018\)](#).

- Ranked 1st in the Nesta’s European Digital City Index (2016)²⁵⁴ which analysed the attractiveness and support for start-ups and scale-ups in digital industries across 60 EU cities. Stockholm and Paris followed London in this ranking.
- Ranked as the most attractive European city by investors -above Paris and Berlin- according to EY Attractiveness Survey 2017²⁵⁵. This survey is essentially focused on foreign direct investment indicators.
- Ranked 2nd in the A.T. Kearney Global Cities Index (2018)²⁵⁶ above Paris, but below New York. London is considered so influential because it possesses the right mix of factors such as business activity, human capital, information exchange, political engagement, and cultural experiences that help organizations and people to thrive -according to this ranking.
- Ranked 7th out of 100 world cities in the ARCADIS’ Sustainable Cities Mobility Index (2017)²⁵⁷, a ranking focused on the sustainability of the urban mobility. Hong Kong, Zurich and Paris led this ranking.

London received the third largest number of international arrivals -19.2 million- in the world in 2016²⁵⁸, only below Hong Kong (26.6 million) and Bangkok (21.2 million). Paris and Berlin appeared in the second and third positions, respectively (Table C.1). London was also the city with the largest number of bed nights (from paid accommodation) in Europe²⁵⁹ (more than 75 million)²⁶⁰ which is a popular indicator used by the hostelry industry to measure their offer and occupancy (one person for one night).

Table C.1: Top 10 European cities by bed nights (from paid accommodation) in 2016

Position	City	Total number (million)	2015-2016 % change
1 st	London	75.1	-3.2%
2 nd	Paris	44	-8.2%
3 rd	Berlin	31.1	2.7%
4 th	Rome	26.8	1.9%
5 th	Barcelona	19.2	8.5%
6 th	Madrid	18.1	0.8%
7 th	Prague	16.8	5.5%
8 th	Vienna	15.8	4.1%
9 th	Munich	14	-0.2%
10 th	Amsterdam	13.8	7.3%

Source: *European cities marketing benchmarking report 2017*

Finally, a very interesting international comparison²⁶¹ published by the ‘Committee for Sydney’²⁶² in March 2018 and based on MasterCard data on consumer spending data in person by time of

²⁵⁴ Nesta’s European Digital City Index (2016).

²⁵⁵ EY Attractiveness Survey 2017.

²⁵⁶ A.T. Kearney Global Cities Index (2018).

²⁵⁷ ARCADIS’ Sustainable Cities Mobility Index (2017).

²⁵⁸ Source: Euromonitor International (2017), ‘Top Cities Destination Index’.

²⁵⁹ There is no available evidence outside Europe.

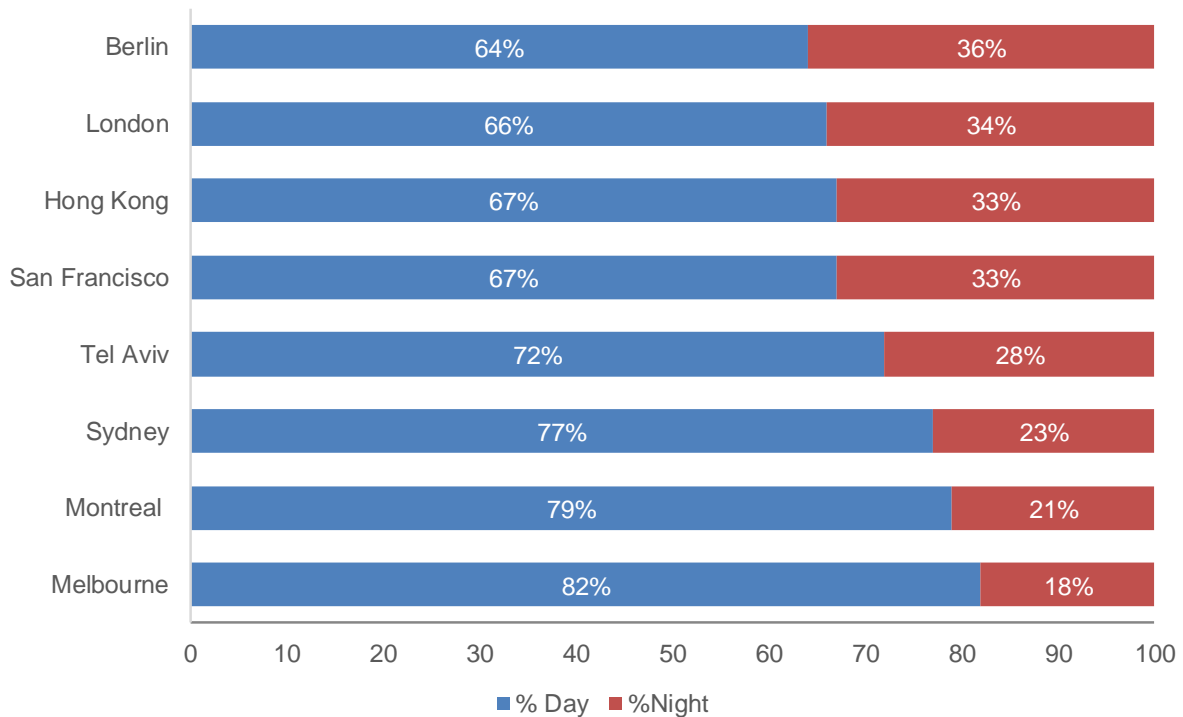
²⁶⁰ Source: *European cities marketing benchmarking report 2017*.

²⁶¹ Source: *The Committee for Sydney (2018), ‘Sydney as a 24-Hour City: expert Commission releases findings’*

²⁶² ‘The Committee for Sydney’ is an independent think tank which provides research and support to the Council of Sydney.

day²⁶³ –including visitors- showed that Berlin (36%/64%), **London** (34%/66%), and San Francisco and Hong Kong (both with 33%/67%) were found **as the global cities with comparatively higher % of spending at night compared to the day** in the year 2017 (Figure C.1).

Figure C.1: Day/night percentage of in person spending by consumers in selected cities in 2017



Source: MasterCard transactions data.

Note: This measure of spending depends on a number of factors including availability of credit cards, and credit card machines in retail outlets and it only reflects data from MasterCard clients. Night time is 6pm to 6am

C.3 International comparisons of night time offer

The international evidence shows that **London performs strongly against other major cities on a number of comparable indicators related to the night time offer**, including cultural indicators, at an aggregate level:

- London appears well ranked internationally in terms of number of night time venues (Table C.2). This result comes from the “World Cities Culture Forum” database²⁶⁴, a network of local governments and cultural sector leaders from 37 members around the world -including London- that provides cultural and touristic information of the cities participating in the network. Examples of this information are: the city profile, key facts of the city, cultural events, data on over 70 cultural indicators and the publication of case-studies and reports on particular cities or issues.

²⁶³ Night time is considered between 6pm and 6am.

²⁶⁴ Source: [World Cities Culture Forum](#)

Table C.2: International comparison of numbers of selected night time venues or performances

Cinemas	Restaurants
1 st Paris (310 in 2013)	1 st Tokyo (149,141 in 2014)
2 nd Shanghai (230 in 2015)	2 nd Shenzhen (84,257 in 2014)
3 rd London (158 in 2013)	3 rd Seoul (81,477 in 2013)
-	4 th Paris (38,393 in 2012)
9 th New York (95 in 2015)	-
10 th Berlin (94 in 2011)	6 th London (24,360 in 2014)
-	7 th New York (23,520 in 2015)
24 th Amsterdam (38 in 2014)	-
	20 th Berlin (4,885 in 2008)
	-
	29 th Amsterdam (1,337 in 2013)
Bars	Major concert halls
1 st Tokyo (28,543 in 2012)	1 st New York (16 in 2015)
2 nd Seoul (18,829 in 2013)	2 nd Paris (15 in 2015)
3 rd Rio de Janeiro (12,072 in 2012)	3 rd Tokyo (11 in 2015)
-	4 th London (10 in 2015)
6 th Paris (3,263 in 2015)	-
-	10 th Amsterdam (5 in 2015)
8 th London (2,694 in 2015)	-
-	29 th Berlin (2 in 2012)
10 th New York (2,657 in 2013)	
-	
12 th Amsterdam (1,516 in 2013)	
-	
16 th Berlin (1,247 in 2008)	
Night clubs	Theatres
1 st Shanghai (1,330 in 2014)	1 st New York (640 in 2015)
2 nd Shenzhen (861 in 2013)	2 nd Seoul (526 in 2015)
3 rd Los Angeles (731 in 2013)	3 rd Paris (490 in 2015)
4 th New York (498 in 2015)	-
-	6 th London (241 in 2013)
6 th London (339 in 2015)	-
-	24 th Amsterdam (58 in 2014)
12 th Paris (171 in 2013)-	25 th Berlin (56 in 2010)
13 th Berlin (152 in 2012)	
-	
25 th Amsterdam (35 in 2013)	
Live music venues	Music performances
1 st Shenzhen (1,017 in 2014)	1 st New York (36,192 in 2015)
2 nd Tokyo (610 in 2016)	2 nd Paris (34,840 in 2015)
3 rd Melbourne (549 in 2015)	3 rd Sydney (20,598 in 2014)
-	4 th London (19,710 in 2015)
5 th New York (453 in 2015)	-
-	13 th Amsterdam (3,900 in 2014)
7 th Paris (430 in 2015)	-
-	N/A Berlin
9 th London (320 in 2011)	
-	
11 th Berlin (250 in 2012)	
-	
14 th Amsterdam (147 in 2014)	

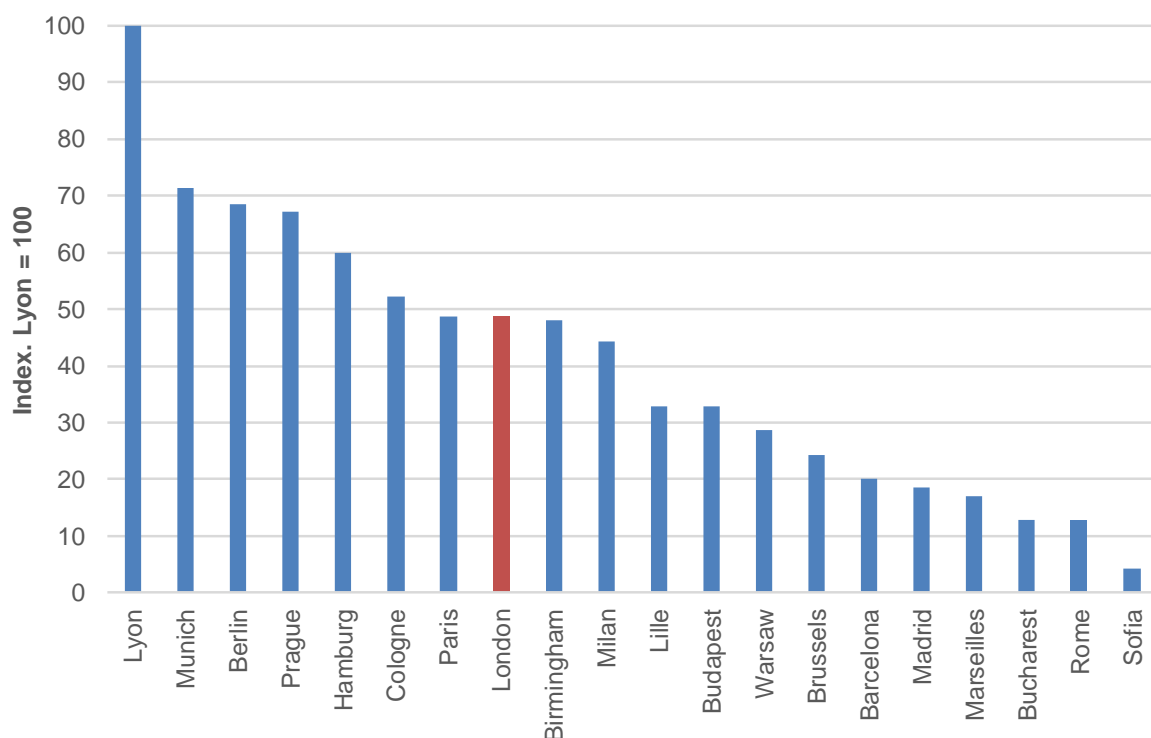
Source: World Cities Culture Forum database. This database is constructed from different sources which may not be strictly comparable²⁶⁵.

²⁶⁵ For more information see Data Sources section of [World Cities Culture Report 2015](#)

While there is some evidence that London’s residents are less well served compared to other European cities when considering satisfaction with cultural facilities, and in relation to the population of the city

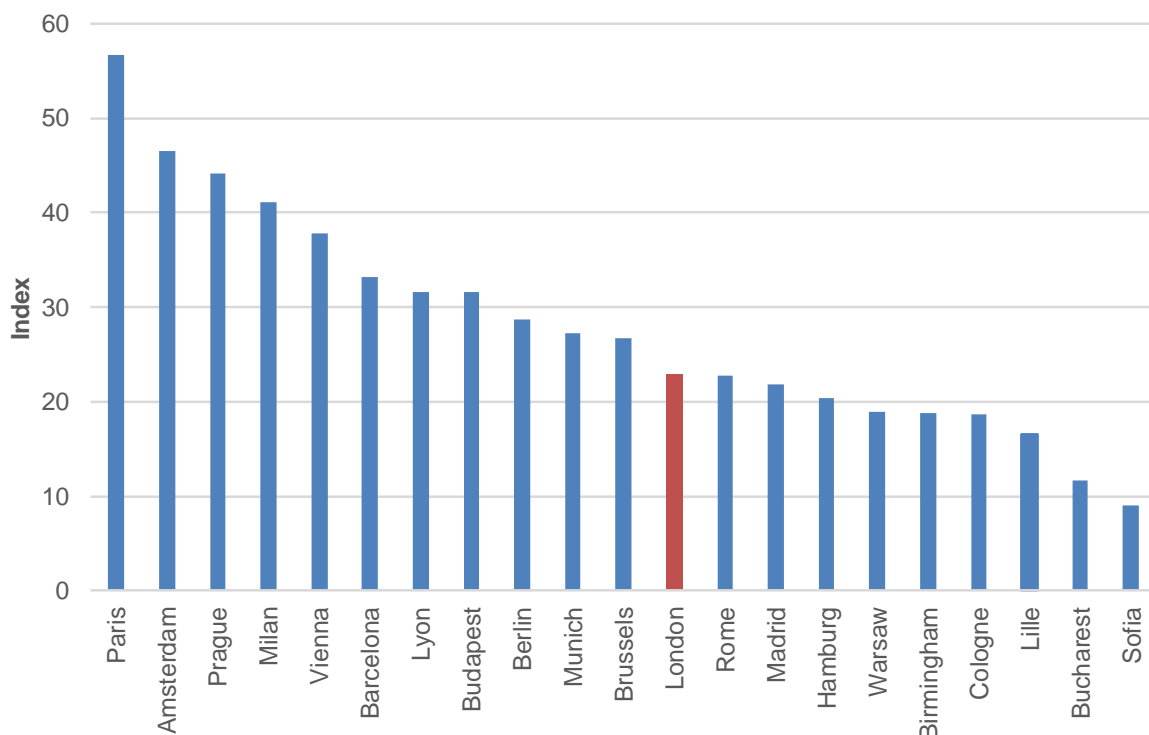
- Alongside Paris, London ranked 8th out of the 21 largest EU cities in satisfaction with cultural facilities in 2017, according to the European Commission project called “Cultural and creative cities monitor”. Lyon, Munich, and Berlin, completed the top 3 positions in this indicator as can be observed in Figure C.2. This EU project tries to promote mutual exchange and learning among EU cities to boost culture-led development. It provides indices/rankings on dimensions such cultural venues, cultural facilities, and cultural participation and attractiveness -among others- for 168 EU cities. As the cities are of different sizes, individual measures are weighted by population of the city. Due to its disproportionate size, this makes London appear relatively low in the ranking across most of the indices like the “cultural vibrancy ranking” where London ranked 12th out of the 21 largest EU cities (see Figure C.3). Cultural vibrancy has measures for the dimensions of cultural venues and facilities, and cultural participation and attractiveness, including local, national, and international audiences.

Figure C.2: Top 21 EU largest cities by satisfaction with its cultural facilities



Source: European Commission (2017), ‘Cultural and creative cities monitor’. Maximum possible score = 100.

Figure C.3: Top 21 EU largest cities by cultural vibrancy



Source: European Commission (2017), ‘*Cultural and creative cities monitor*’. Maximum possible score = 100.

This evidence perhaps suggests that the view of Londoners of the city’s cultural facilities is less positive than that of visitors to the city.

C.4 International night time initiatives

Many cities around the world are developing initiatives to support night time activities. An important part of our research has focused on finding out what initiatives other global cities are carrying out to promote night time activities. The chosen cities for this comparison are Sydney, Melbourne, Paris, Berlin, Toronto, San Francisco, Amsterdam, and other Dutch cities, and the main criteria for this selection is information we found publicly available. Some cities, including New York City and Manchester but not solely these cities, have not been included in this analysis due either to the lack of available information²⁶⁶, or because the development of initiatives is at an early stage. Table C.3 summarises the main findings of this research. The information has been grouped by cities/group of cities (twelve including London) and by night time economy themes: “governance/strategy”, “concerns/potential costs”, “benefits”, “place-based measures”, “venue-specific measures”, “person-based measures”, “popular night events” and “data collection”. This approach draws from Van Liempt I. and Van Aalst I. (2012)²⁶⁷. **The information provided is intended more to provide a sense of the range of ongoing activity, rather than be definitive or comprehensive.**

²⁶⁶ NYC Council created for the first time its ‘Office of Nightlife’ in October 2017 and appointed its first ‘Nightlife Mayor’ in March 2018.

²⁶⁷ Van Liempt I. and Van Aalst I., (2012), [Urban Surveillance and the struggle between safe and exciting nightlife districts](#)

Table C.3: International night time initiatives

Themes	London	Sydney	Amsterdam	San Francisco	Berlin	Melbourne	Paris	Toronto	Dutch cities
Governance /strategy	Night Time Commission of the Mayor Night Czar 24h London Vision	"OPEN Sydney: Strategy and action plan 2013-2030" Night mayor Small bars legislation "Lockout laws" Liquour laws	Night mayor "Celebrate Safe!" 24-hour business area	Entertainment Commission "Good neighbour" policy Liquour board Agent of change law	Berlin Club Commission Agent of change: if a music venue is in place before the residential building, the latter will be responsible	Night time economy strategy/ 2014-18	Conseil de la Nuit Night time strategy Night mayor	No explicit authority Music-oriented policies Harder conditions to obtain a licence	Safe nightlife programmes Night mayor
Concerns/ potential costs	Alcohol consumption Noise Insecurity Visitor experience Anti-social behaviour Waste Road safety and congestion	Location of taxi ranks Cleaning Transport Crime and disorder Footpath capacity Diversification Public health Anti-social behaviour	Crime Violence Noise	Noise Night transit	Safety Comfort Tourism Drugs Pickpockets Noise	Safety Inclusion Vibrancy Functionality Noise Alcohol Taxi shortage	Tourism Restore the centre's nightlife Compete against other capitals Cultured and wealthy audience	Diversification Main street revitalization Noise Safety Dirtiness	Crime Gender, sex and diversity issues Low visitor presence
Benefits	Economics Diversity Safety	City reputation Employment Tax revenues Boost in some sectors Security	Relaxed atmosphere Low crime Accessibility Security					Increasing weight of the night time economy Investment New constructions	Safety Tourism
Place-based measures	Introduction of 'agent of change' principle Night-transport system Best Bar None status as a sign of responsible operation and management of alcohol-licensed premises Policing Special street cleaning	24h public library Street medical centres Public police Alcohol free zones Free bus services CCTV cameras ID scanners	Night buses		24/7 night transport system Free public toilets Bigger bins in the night	Effective waste management			

London at night:
An evidence base for a 24-hour city

Themes	London	Sydney	Amsterdam	San Francisco	Berlin	Melbourne	Paris	Toronto	Dutch cities
Venue-specific measures	Licensing Restrictions on closing hours Licensing database Pricing rules Late night levy	Private security Liquour licenses CBD Entertainment precinct: Precinct with permissive rules at night	Softer outdoor lighting "Square hosts": Project to reduce street noise 24h venue licenses	Extended hours permits	24h bar licenses	Safe taxi rank schemes	Public parks after midnight in summer Extended hours in the attractions in summer	Business licenses Restrictions on entertainment establishments Restrictions on nightclubs	Restrictions on closing hours Ban on "happy hours" and "special promotions"
Person-based measures	Outfit and identification of the door staff	Encouraging retailers and attractions to stay open late	Noise complaints app			Drogadict's attention	Night specific programme for tourists		Detention procedures Pub and club bans
Popular night events	Museums at night Lumiere BBC Proms Bonfire night Art night Film 4 summer screen London Food Month EFG London Jazz Festival New Year's Eve fireworks	Vivid Sydney Sydney Comedy Festival Diner en blanc Sensation White	King's night Holland Festival Museums at night Turn on the lights Bijenkorf Artis summer evenings Amsterdam light festival Night for the night	Pink Mammoth Block party Litquake Festival	Long night of science Nachtmarkt Jazzfest Berlin Botanical night Postdam palace night Long night of museums Pyroonale	Moonlight cinema Rooftop cinema Summer cinema Zoo twilights White night International Jazz festival Music week	Nuit Blanche European museums at night Fountains night show in Versailles Paris Jazz Festival Open-air cinema festival Festival Paris l'ete Parks at night in summer	Nuit Blanche Toronto light festival Canadian music week Toronto jazz festival Summer music festival	
Data collection	Physical and online surveys TfL data London Datastore	Precinct surveys Observational surveys Pedestrian counts Observed on-street activity Monitoring businesses		Surveys Online tools					Interviews of passers-by

Source: GLA Economics analysis based on international data sources, reports from both private and public organizations worldwide, international surveys, international media and academic papers.

Some conclusions may be drawn from Table C.3:

- **Other global cities are also putting in place initiatives to promote their night time offer or minimize the associated negative impacts of a growing night time economy.**
- There is a shared sense that the most common problems/risks arising from night time activity are considered to be: crime, anti-social behaviour, feelings of lack of safety, violence, noise, transport issues, lack of diversity, alcohol, drugs, and lack of cleanliness.
- Cities have created an institutional framework – appointing night mayors, setting up commissions, agents of change, bringing in new legislation, such as ‘agent of change’ legislation – and implementing specific measures to tackle their local issues – including ad-hoc projects, person-based, venue-based and place-based measures-.
- Some of these measures coincide across cities: the better management of business licenses at night, restrictions on alcohol and closing hours, enhanced emergency services, increased police presence, the improvement of the public transport system at night, new security systems in public and private spaces, and a more effective waste/bins management.
- While others are very particular: for example, the Purple Flag scheme in the UK, noise complaints app in Amsterdam, safe taxi ranks in Melbourne, bigger bins at night in Berlin, the CBD Entertainment precinct in Sydney, open public parks after midnight in summer in Paris.
- In addition to the negative effects of a growing night time economy presented above, the promotion of night tourism, and the city’s reputation, and the diversification of the night time economy have also become important goals for the public authorities in recent years.
- And in some cities the development of night time events has become an important component of the offer. Some of these events have already become a tourist reference point for the city, such as ‘Nuit Blanche’ in Paris, ‘Vivid’ in Sydney, ‘King’s night’ in Amsterdam.
- **Data collection is also becoming increasingly important** for the local authorities to obtain information related to the night time economy. The most employed data collection methods abroad are: precinct surveys, pedestrian counts, observed on-street activity, online surveys, interviews of passengers-by and the interaction with the night stakeholders.
- **The only available evidence of a city with a clear and public long-term strategy for its night time economy is Sydney**, in Australia²⁶⁸. This city has a concrete plan in the areas of transport, city offers, public spaces, sustainable growth, innovation,

²⁶⁸ For more detail see: City of Sydney (2013), “[OPEN Sydney: Future directions for Sydney at night. Strategy and action plan 2013-2030](#)”.

licensing and regulation, tourism, experiences, precincts, drinking and governance until 2030. LNMAR is the name of the project implemented by the City of Sydney since 2010 that provides continuous research and support to the local authority in its mission of planning and managing the city at night.

Recent research²⁶⁹ identifies 19 cities which have established bodies or roles to manage nightlife, and that the pace of their establishment is accelerating. It has identified three types of organisation:

- Dedicated night councils
 - 2003 San Francisco (Office of Economic and Workforce Development)
 - 2013 Nantes (Night Council)
 - 2014 Paris (Night Life Council, City and Regional)
 - 2016 London (Night Time Commission)
 - 2016 Rennes (Night Life Council)
 - 2017 Fort Lauderdale (NTE Management Team)
 - 2017 New York City (Office for Nightlife)
- Individual night time managers
 - 2015 Pittsburgh (NTE coordinator)
 - 2016 Cali (Nightlife manager)
 - 2016 Valparaiso (Nocturnal delegate)
 - 2016 Orlando (NTE project manager)
 - 2016 London (Night Czar)
 - 2017 Iowa City (Downtown night mayor)
 - 2017 Aberdeen (Night manager)
- Independent offices
 - 2001 Berlin (Club Commission)
 - 2001 Zurich (Nightlife roundtable, Bar and Club Commission)
 - 2003 Amsterdam (Nightwatch Conglomerate, Night Mayor's Office, Night Council)
 - 2011 Geneva (Grand Council of the Night)
 - 2014 Toulouse (Toulouse Nocturne)
 - 2018 Manchester (Night Time Commission)

C.5: Evaluation evidence of international initiatives

What the previous summary of initiatives does not provide is evidence on what works, and ways to best develop night time activities aimed at reducing negative externalities while increasing the identified benefits of the night time economy. In this sense, Bevan et. al (2011)²⁷⁰ finds indispensable the use of continuous consumer surveys to obtain city updated comparative information on what people are spending; what they are spending it on and why they spend. This tool must be combined, according to Bevan, with attitudinal research questions that help the authorities better understand motivation and perspectives on future developments. In

²⁶⁹ Unpublished research, "International benchmarking study of nocturnal policy" by UCL City Leadership lab, and presented to the Night Time Commission

²⁷⁰ Bevan et al (2011), 'Sydney Night Time Economy: A cost-benefit analysis'.

addition, the author considers essential the “need for independently led focus upon the strategy towards a successful night time economy. This focus needs its own management structure and its own champions to develop continuous debate with the relevant stakeholders and experts in the field. In a similar way, the subject of reducing the negative social impacts ... should have its own focus of policy development and management”.

GLA Economics has contacted a number of organizations²⁷¹ with the aim of monitoring and collecting evidence of international night time initiatives. Although there is documentation on initiatives and media reporting of their effects, there has been little formal evidence gathering. Evidence has been found for Sydney and London, and is summarised below.

London:

Lumiere

The ‘Lumiere evaluation report 2018’ published by “The Audience Agency” in March 2018 shows an independent evaluation of the popular outdoor lights festival which took place in January 2018 in London. The main conclusion of this report is that this event generated a positive economic impact of £5.7 million for the city. More details of this initiative can be found in Box C.1.

Box C.1: The ‘Lumiere evaluation report 2018’

Description of the initiative: The ‘Lumiere’ is an outdoor festival, free to attend, that consists in light art-installations and lighting of iconic buildings and locations in the city centre of London. The 2nd iteration of the event took place during four days in January 2018, and the 1st time was in January 2016.

Main results of the 2018 evaluation:

- Economic impact: £5.7 million.
- Total number of visits: 1.4 million.
- 33% of visitors were visiting London particularly for the event.
- 84% rated the whole experience very good or good.
- 43% strongly agreed or agreed Lumiere made them more likely to visit London again in the future.

Main sources and methodologies employed:

- Face to face and online surveys.
- Feedback from volunteers.
- Social media and press.
- Head counts throughout the event.
- TfL CCTV camera footage.
- Footfall street counters.
- Economic Impact Calculator.
- Advertising impact.

Source: *Lumiere Evaluation report 2018*

²⁷¹ ‘European Nightlife Association’, ‘American Nightlife Association’, ‘International Nightlife Association’, ‘EuroCouncil for the Night’, ‘International Nightlife Congress’, and ‘Monaco International Clubbing show’.

Islington Cumulative Impact Zone policy²⁷²

The Licensing Act 2003 enables English local authorities to implement Cumulative Impact Policies (CIPs). CIPs strengthen the powers of local authorities to reject license applications for retail alcohol sales in cumulative impact zones (CIZs), where adverse effects of high alcohol availability can be demonstrated.

Islington has one of the highest densities of pubs, bars, clubs and off licenses in the country and second highest in London after the City of Westminster, which includes the West End. Alcohol consumption has been identified as a major factor behind violent crime and disorder in the borough with consequences for victims, businesses and local communities. Islington's residents also suffer from high levels of alcohol-related ill health and early deaths.

The evaluation focused on the introduction of CIZs across Islington in January 2013, but also took into account concurrent implementation of other aspects of the current Alcohol Licensing Strategy (2013–2017) including a focus on reducing premises trading hours, reducing off-license availability, and improving the quality of alcohol retailing overall.

The policymakers and practitioners that implemented the CIP did not intend for the policy to reduce the number (or density) of premises selling alcohol in Islington, but aimed to reduce the impact of alcohol-related harms in the borough.

The results of the evaluation show that the Licensing Strategy overall, and the CIP specifically, have been broadly effective. The implementation of the strategy has met the objectives of reducing crime, anti-social behaviour and alcohol-related ambulance call outs, reducing the rate of successful applications for off-licenses, and reducing the average weekly trading times of alcohol licenses granted.

Concurrently, three years after CIP introduction there have been increases in rates of alcohol licenses granted overall. There also appears to be little or no impact on alcohol retail sales volume and sales revenue, for on-licenses, predominantly pubs and bars, since 2013. (There has, though, been a decline in the number of off-sales premises between 2013 and 2017 – see Chapter 6.)

The evaluation concludes that Islington's Licensing Strategy and the CIP have reduced alcohol-related harms without negatively impacting on the overall night time economy in Islington and the ability of alcohol retailers to operate if they meet the conditions required.

Sydney:

OPEN Sydney

OPEN Sydney is the city's strategy and action plan for the long-term development of Sydney's night time economy to 2030. The council endorsed the strategy in February 2013. The evidence base is an integral part of strategy development including:

- Data collection on walking trends across the city during the day and at night, by video surveys at certain locations
- Overview of visitor profiles and experiences

²⁷² See [Islington Licensing Policy Review 2017 - cumulative impact assessment](#) and [Evaluating the impact of a Cumulative Impact Zone Policy to reduce alcohol-related harms in Islington Local Authority - NIHR School for Public Health Research](#)

- Research reports, including international evidence²⁷³

Sydney lock out laws

In 2014, the New South Wales (NSW) state government introduced a range of measures with the aim of reducing alcohol-related violence and antisocial behaviour in the Sydney Central Business District Entertainment precinct (the CBD precinct). These measures (the Plan) were introduced in two phases between February and December 2014.

Phase One included legislated liquor reforms including a 1:30am lock out and 3:00am cessation of alcohol service, the application of a liquor licence freeze to the newly established CBD precinct and the introduction of temporary banning orders that police can issue to remove troublemakers from the CBD precinct. Phase Two covered a range of measures to improve the safety of venues and patrons, the environment and travel in the CBD precinct.

The Centre for Program Evaluation is an entity of the NSW Treasury that ‘provides evaluation design advice, conducts a number of program evaluations, and facilitates evaluation capability building for the NSW Government’. In August 2016, this Centre published an evaluation report²⁷⁴ of the above-mentioned measures on the CBD precinct in 2014.

In order to conduct the evaluation report, the Centre for Program Evaluation employed the following data sources:

- Police record data.
- NSW ambulance data.
- Health data linked with NSW ambulance data.
- Licensed premises survey.
- Stakeholder consultations.
- Pedestrian counts and community survey.
- Program data.
- Financial and other industry data.

And the global evaluation of the Plan was divided into process, outcome and economic evaluations where the following methodologies were employed:

- The impact of the Plan on the incidence of assaults was measured using an interrupted time-series analysis to assess whether the change in the number of assaults was statistically significant following the Plan’s implementation.
- The impact of the Plan on the incidence of alcohol-related injury was also measured using an interrupted time-series to assess whether the change in the number of injuries was statistically significant after the Plan’s introduction.
- The economic impact of the Plan was assessed through a benefit-cost analysis. To examine this, financial, economic and social impacts associated with the Plan were identified and compared to a counterfactual case (or ‘no policy change’ scenario) to

²⁷³ Available at [Night-time economy - City of Sydney](#)

²⁷⁴ NSW – The Treasury (2016), ‘[Evaluation of the Sydney CBD Entertainment Precinct Plan of Management](#)’

identify the incremental costs and benefits. The difference between the two scenarios reflects the impact of the Plan.

The main results of this report are:

- Both alcohol-related and total non-domestic assaults in the CBD precinct declined following the implementation of the Plan. In particular, alcohol-related assaults declined by 16% and total non-domestic assaults declined by 11.4%.
- The Plan reduced the incidence of both severe and critical injury and potentially serious to less urgent injury in the CBD precinct, particularly over the weekend period and 'High Alcohol Time periods'.
- The Plan resulted in an estimated net benefit of \$29.8 million (net present value (NPV)) to the NSW community over the February 2014 to December 2015 period. This is the result of net reductions in alcohol-related assaults and injuries that occurred in the CBD precinct and displacement areas and the resulting high value of non-monetary benefits (costs avoided) to individuals, health care services and the criminal justice system.

The evaluation reports that the decline in assaults was around 12 a month, and that there was an increase in assaults in neighbouring areas of around 2 a month. So, the estimated benefits depend on the valuation of the physical and emotional harm of assault.

More broadly, since January 2009 the incidence of alcohol-related non-domestic assaults in the CBD precinct had been declining prior to the introduction of the Plan. Other findings are that:

- A CBD resident group consulted as part of the evaluation reported modest improvements in amenity and safety in their local area since the Plan commenced
- Licensed premises trading after midnight reported an average decline in turnover between 2013 and 2015, while premises trading before midnight reported an average increase over the same period. Both before and after midnight traders reported declines in staffing levels
- The live and recorded music industry has experienced declines in admissions of around 12% between 2014-15 and 2012-13 in an area approximating the precinct
- There may have been some declines in patronage and foot traffic in the CBD precinct
- Thirteen venues with gaming licences have received an exemption to the lock out

The report authors note that some social and economic impacts (such as consumer choice impacts) have not been valued quantitatively due to difficulties obtaining robust and reliable data, and as a result costs may be underestimated. That is the evaluation focused on benefits from a reduced number of victims of crime, and had much less emphasis on costs to businesses from reduced activity, and reduced pleasure for individuals from going out. This is considered more in the next two paragraphs, and Annex E provides a conceptual framework to consider the costs and benefits of night time activities. In consequence, the City of Sydney continues to

seek opportunities for advocacy to make improvements to the liquor licensing system administered by the New South Wales Government²⁷⁵.

For businesses, while the evaluation estimates implementation costs in making changes required by the Plan it does not seek to estimate lost business from the changes. Between 2009 and 2014 turnover of drink establishments increased by 34% from \$445 million to \$631 million at an annual rate of 7.2%. In 2015, the year of introduction of the Plan turnover fell to \$597 million, by 5.4%, and a fall of \$34 million, Table C.4. Beyond noting that this is a marked change, it is not possible to attribute how much of it might be attributable to the introduction of the Plan rather than what might have happened anyway.

Table C.4: Trend in drink, entertainment, and food establishments, number and turnover, Sydney, 2009-2015

	2009	2011	2012	2013	2014	2015
Establishments						
Drink	416	429	562	547	575	531
Entertainment	835	874	838	783	824	823
Food	2729	3066	3290	3148	3354	3254
Total	3980	4369	4690	4478	4753	4608
Sales turnover (\$m)						
Drink	445	422	535	586	631	597
Entertainment	940	886	962	1006	1014	1139
Food	1458	1447	1666	1687	1881	1900
Total	2843	2756	3162	3280	3526	3637

Source: Australian Bureau of Statistics²⁷⁶

For people going out at night, despite the reduction of alcohol-related violence and antisocial behaviour in Sydney, there is evidence that other challenges remain related to access to night time activities. A recent survey²⁷⁷ found that only 46% of consumers were satisfied with Sydney's current night time offer which is focused on: live sport events, movies, live theatre or music, pubs, dining out, and shopping. This proportion is even much lower among 35+ years old people. Besides, the survey revealed that there was a generalised desire for more late-night transport options in the city, with 63% of the respondents saying that they would go out more often if Sydney had 24h public transport and 51% saying that they would stay out later.

C.6 Other developments

Some cities are considering other ways to address evidence gaps. For example:

- **San Francisco** has set up a Late Night Transportation Working Group²⁷⁸. This comprised of local transportation providers, representatives from night time and early morning businesses, nightlife advocates, labour unions with employees who work late

²⁷⁵ See [Night-time economy - City of Sydney](#)

²⁷⁶ As sourced from [2009 – 2015 Night Time Economy report – Council of Capital City Lord Mayors](#). A second report indicates that there has since been some recovery in drink establishments [Measuring the Australian night time economy 2016-2017 – Council of Capital City Lord Mayors](#)

²⁷⁷ Source: *The Committee for Sydney (2018), 'Sydney as a 24-Hour City: expert Commission releases findings'*

²⁷⁸ See [San Francisco Late Night Transportation Working Group | NightlifeSF](#)

nights or early mornings, and other stakeholders interested in late night transportation issues. The work culminated in the release of “The Other 9 to 5: Improving Late-Night and Early-Morning Transportation for San Francisco Workers, Residents, and Visitors”. It surveys transportation to, from, and within, San Francisco, and articulates 15 recommendations.

- **Berlin** has audited and mapped out its music venues²⁷⁹
- **London** is developing a Cultural Infrastructure Plan in order to sustain what needs to be done to maintain London’s future as a cultural capital²⁸⁰, and which has an initial phase an audit and map of creative and cultural institutions and spaces

C.7 Conclusions

London is perceived as a global city and most of the international rankings corroborate its image of global leadership as a place to visit and go out at night:

- Third largest number of international arrivals of any world city, 19.2 million in 2016
- Largest number of bednights (from paid accommodation) of any European city, 75 million in 2017
- Amongst visitors, and potential visitors, London ranks second as an enjoyable city
- A comparatively high proportion of credit card spending in person at night, 34%
- Consistently high rank internationally in the provision of cultural venues and performances
 - 3rd highest number of cinemas
 - 4th highest for major concert halls
 - 4th highest for music performances

There is, though, some indication that London’s residents are less well served in terms of cultural facilities compared to other European cities, when considered relative to its population, and in terms of satisfaction with the facilities.

As with London, other global cities are putting in place initiatives to promote their night time offer or minimize the associated negative impacts of a growing night time economy around:

- Development of governance and strategy
- Improved measures to improve safety
- Measures to make cities more attractive
- The promotion and diversification of the night time offer through events and other initiatives

Despite a shared interest in the promotion of night time activity across a range of cities there is little evidence of systematic evidence gathering through monitoring and evaluation to improve understanding of what works. There are, though, various developments:

- 19 cities across the world have an independent body to represent night time industries; a Night Czar or Night Time Mayor; or night time offices within government
- Other initiatives to develop the evidence base

²⁷⁹ See [Creative Footprint](#)

²⁸⁰ See [Have your say - Draft Culture Strategy for London | London City Hall](#)

- San Francisco has a Late Night Transportation Working Group, which has surveyed late night and early morning transportation to, from, and within San Francisco, and made 15 recommendations for improvements
- Berlin has audited and mapped its music venues
- London is developing a Cultural Infrastructure Map
- The only city with a clear and public long-term strategy for management of its night time economy is Sydney.

The experience of the Sydney lock-out laws demonstrates the challenges of coming up with a set of policies which meet the desire for an improved night time offer with effective management of potential adverse consequences while balancing the conflicting interests of residents and people going out. There is a lesson that the results of the evaluation of the lock-out laws have not been accepted by important stakeholders, despite using a sound methodology, because they focused on the costs of crime, and did not address the impact on cultural vibrancy of the laws for businesses and individuals going out at night.

In contrast, Islington has introduced licensing restrictions which evaluation evidence concluded reduced alcohol-related harms with negatively impacting on the overall night time economy.

Annex D: Public transport journeys within London

D.1 Purpose and structure

The main paper reports results from the TfL Travel in London report²⁸¹, and corresponding data for public transport use. This annex provides more information on the patterns of travel by individuals on public transport to provide a comparison between night time and day time travel patterns across London. That is, it does not have information on private vehicle use, such as a car or taxi, cycling and walking.

This annex has sections on:

- The properties of the data, and definitions
- Departures by London sub-region on a weekday
- Arrivals by London sub-region on a weekday
- Departures by London sub-region at the weekend
- Arrivals by London sub-region at the weekend
- Summary of findings

Results by time of day for the whole day. This provides a comparison between day and night time use of public transport. Regardless of time of travel there will be a variety of reasons for travelling around London, such as:

- Commuting to and from work
- Leisure and recreation
- Shopping

And travellers might be:

- London residents
- London visitors
- International visitors

This analysis records all journeys. It does not seek to identify the purpose of travel, or the characteristics of the traveller, although some inferences on travel patterns are drawn in the summary.

D.2 Properties of the data and definitions

TfL provided GLA City Intelligence Unit with information on all journeys started in London using the Oyster or contactless card payment method on:

- Wednesday 10 January 2018, a weekday
- Saturday 13 January 2018²⁸², at the weekend

The data was aggregated into two-hourly time slots.

²⁸¹ See [Travel in London reports - Transport for London](#)

²⁸² The TfL clock starts at 4.30am on the day, and continues until 4.29am the following day

This includes all journeys for which these payment methods were used, and so includes Rail, bus, tube, DLR and tram. It does not include journeys for which the traveller had a magnetic strip card. This will account for many journeys into London from outside London, particularly on National Rail²⁸³, and can also be used within London where a Travelcard has been purchased with a National Rail ticket. TfL estimates that this accounts for around 4% of all journeys on the TfL network.

TfL provided the start point for a journey by borough, and end point by borough, where available. If a journey comprises of multiple stages, where possible this has been reported as a single end-to-end movement. There are three instances where this has not always been possible:

- TfL uses an inference tool to infer where a bus journey has ended based on the next tap made by a card, and matching this to bus routes. It is not always possible to draw an inference.
- No inference is made about the end point of tram journeys
- Unfinished rail journeys, that is journeys where the traveller did not tap out, will not have a destination recorded

There are also some journeys which end outside London. As a result of this missing information it has not been possible to estimate net movements into and out of boroughs over the course of a day. Aggregate data on arrivals by borough is less than aggregate data on departures. There may also be some biases in the data in that the underestimation of arrivals to some areas may be comparatively higher. For example, tram journeys are in South London, where there is no inference of destinations, and bus journeys tend to be in outer boroughs.

This annex provides an analysis of departures by borough, and arrivals by borough grouped into sub-regions of London. There are also journeys which start and end in the same borough or sub-region.

The main paper has a chart on the movements between boroughs where this is known. This shows that there are movements to and from all parts of London at all times of day²⁸⁴. The main paper also includes analysis of commuting flows, and the predominant reason for travel on a weekday is to commute to work²⁸⁵.

The analysis follows two definitions of areas within London:

- GLA Administrative boundaries, which is what TfL uses in its publications – see Table D.1
- Statistical boundaries, which is what ONS uses²⁸⁶ – see Table D.2. This has a finer grouping of areas within London than administrative boundaries, and is the definition has been used in this annex

²⁸³ Although payment for bus journeys started outside the London boundary can be by Oyster or contactless card

²⁸⁴ This uses the administrative definition of areas within London, so it can be compared with the TfL Travel in London results which are on this basis.

²⁸⁵ This uses ONS data, and follows a statistical definition of areas within London.

²⁸⁶ This is known as the Nomenclature of Territorial Units for Statistics (NUTS) 2010 arrangement for sub-regions of the UK. Under this convention, Greater London corresponds to NUTS-1, NUTS-2 divides inner London into two sub-divisions and outer London into three sub-divisions, with NUTS-3 splitting these sub-divisions further into individual boroughs or local authority groupings

Map D.1 provides a visual representation of London’s areas. The two definitions of London’s inner areas broadly correspond except:

- Greenwich is an inner area for administrative but not statistical purposes
- Haringey is an inner area for statistical but not administrative purposes

Table D.1: Classification of London’s administrative sub-regions

Central London	Inner London	Outer London
Camden	Greenwich	Barking & Dagenham
City of London	Hackney	Barnet
Kensington & Chelsea	Hammersmith & Fulham	Bexley
Westminster	Islington	Brent
	Lambeth	Bromley
	Lewisham	Croydon
	Newham	Ealing
	Southwark	Enfield
	Tower Hamlets	Haringey
	Wandsworth	Harrow
		Havering
		Hillingdon
		Hounslow
		Kingston
		Merton
		Redbridge
		Richmond
		Sutton
		Waltham Forest

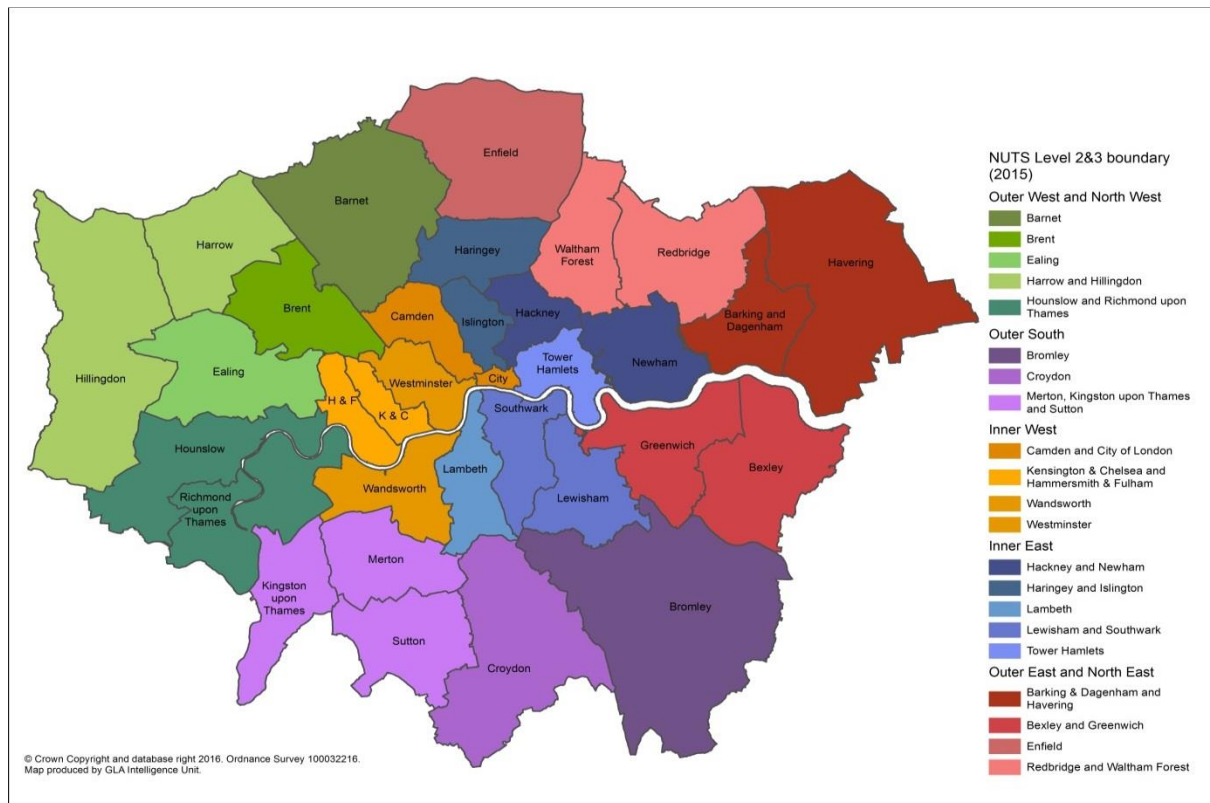
Source: Greater London Authority

Table D.2: Classification of London’s statistical sub-regions

Inner London		Outer London		
Inner London – West	Inner London – East	Outer London – West and North West	Outer London – East and North East	Outer London – South
Camden	Hackney	Barnet	Barking and Dagenham	Bromley
City of London	Haringey	Brent	Bexley	Croydon
Hammersmith and Fulham	Islington	Ealing	Enfield	Kingston upon Thames
Kensington and Chelsea	Lambeth	Harrow	Greenwich	Merton
Wandsworth	Lewisham	Hillingdon	Havering	Sutton
Westminster	Newham	Hounslow	Redbridge	
	Southwark	Richmond upon Thames	Waltham Forest	
	Tower Hamlets			

Source: Office for National Statistics

Map D.1: London's five statistical sub-regions



Source: GLA City Intelligence Unit

D.3 Departures by London sub-region on a weekday²⁸⁷

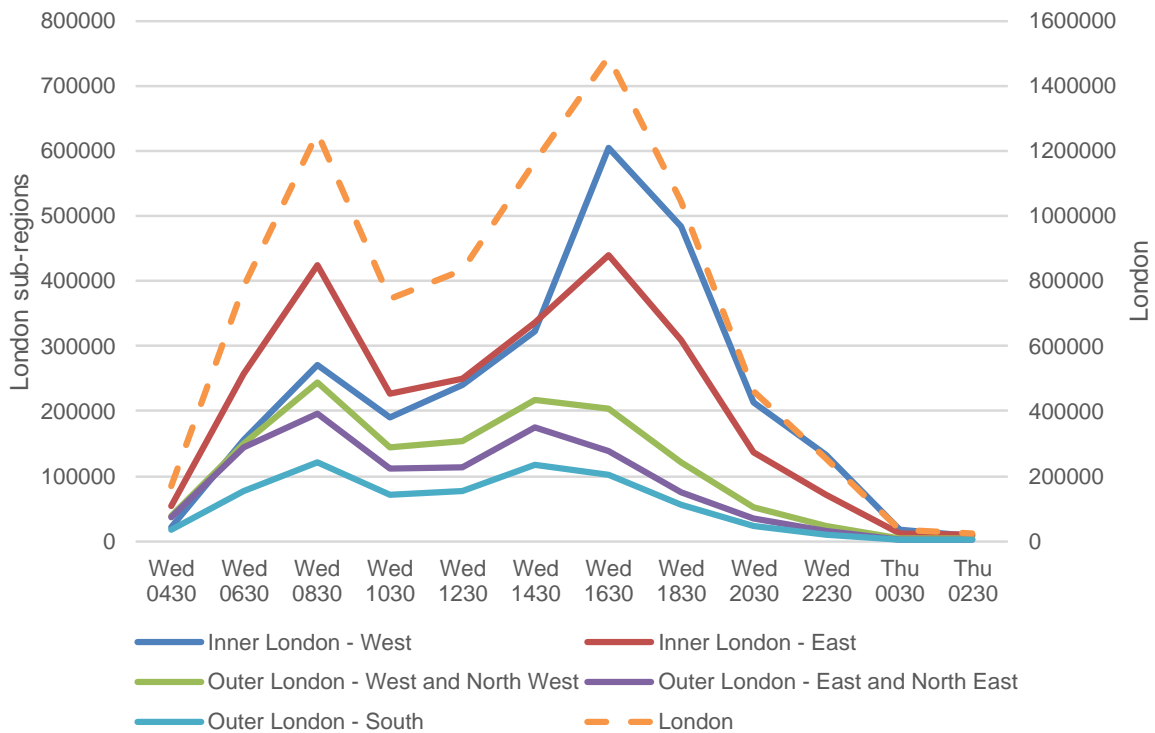
At its highest around 1.5 million people are starting a journey in London on public transport, and this happens between 4.30pm and 6.30pm in this dataset²⁸⁸. Over 1 million of these journeys start in inner London, around 605,000 in inner London – west, and 440,000 in inner London – east. As the evening turns to night the number of journeys started falls steadily. Between 8.30pm and 10.30pm around 460,000 journeys start, 215,000 in inner London – west, and 135,000 in inner London – east. In contrast, the morning peak in this dataset is between 8.30am and 10.30am²⁸⁹ when over 1.2 million journeys start. Again, it is more common for journeys to start in inner London – west and inner London – east than other parts of London, see Figure D.1.

²⁸⁷ Analysis is for Wednesday 10 January 2018

²⁸⁸ In the LTDS, TfL defines the evening peak as 4-7pm, and so the timeslot within this analysis falls within that period

²⁸⁹ In the LTDS, TfL defines the morning peak as 7-10am, and this overlaps with the timeslot in this analysis

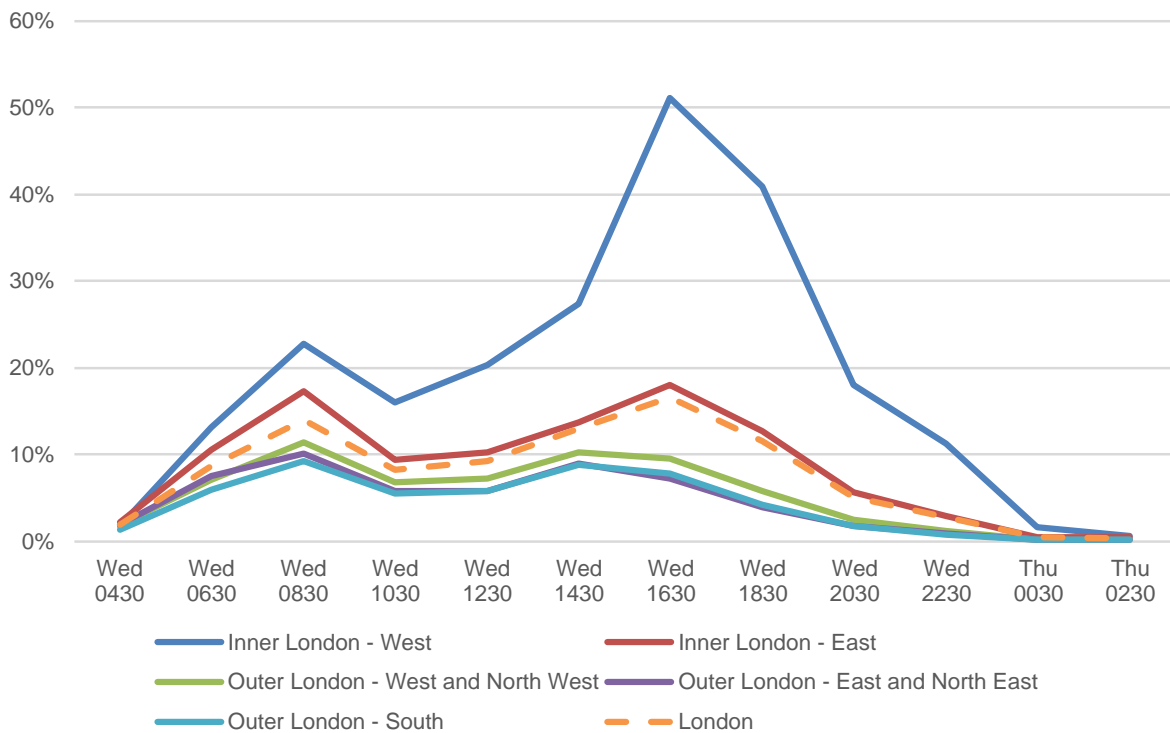
Figure D.1: Numbers of people starting journeys on public transport by London and sub-regions in two-hour slots on a weekday



Source: GLA Economics analysis of TfL data
Note: two-hour slots are when journey started

Figure D.2 is as for Figure D.1 except it weights the number of journeys started in an area by the resident population. Again, throughout the day journeys started are highest in inner London – west, and inner London – east. The ratio is over 50% for inner London – west for journey started there between 4.30pm and 6.30pm, falling to a little under 20% between 8.30pm and 10.30pm. The comparable figures for the whole of London are 17% and 5%.

Figure D.2: The proportion of people starting journeys on public transport weighted by resident population for London and sub-regions in two-hour slots on a weekday



Source: GLA Economics analysis of TfL data and GLA household and population projections²⁹⁰

Note: two-hour slots are when journey started

Another way to consider the data is the proportion of journey starts on public transport for each sub-region of London over the day, see Figure D.3. From 4.30pm in the afternoon to 4.30am in the morning 70% or more of journeys start in inner London. It is only between 4.30am and 6.30am that over half of journeys start in outer London.

²⁹⁰ Figures are 2018 estimate from 2016-based central variant. See [GLA Population and Household Projections](#)

Figure D.3: Distribution by London sub-region of people starting journeys on public transport in two-hour slots on a weekday



Source: GLA Economics analysis of TfL data
Note: two-hour slots are when journey started

Across London a quarter of journeys start between 6.30pm and 6.30am. Only in inner London – west of the sub-regions do a higher proportion of journeys start during these hours at a third. For the outer sub-regions the proportion is between 16 and 18%, Figure D.4.

Figure D.4: Distribution of started journeys on public transport for London and sub-regions in two-hour slots on a weekday



Source: GLA Economics analysis of TfL data

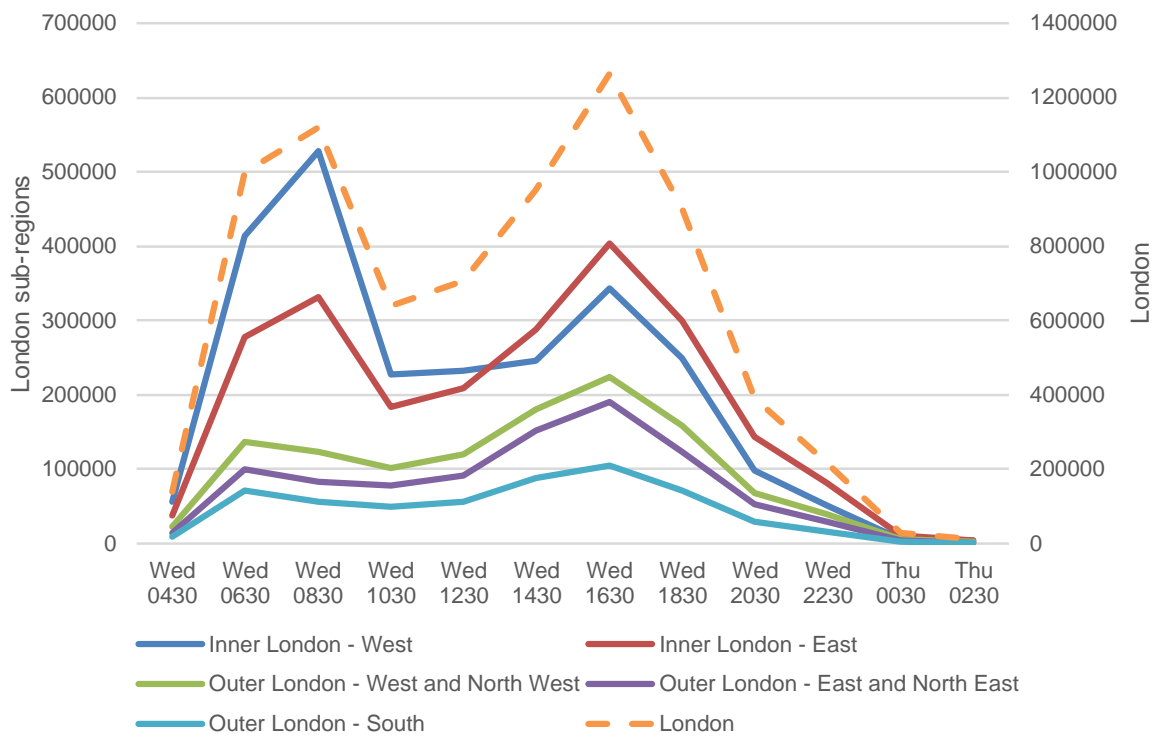
Note: two-hour slots are when journey started

D.4 Arrivals by London sub-region on a weekday²⁹¹

There are around 1.25 million journeys in London on public transport between 4.30pm and 6.30pm where an end point is recorded. Around 0.75 million of these journeys end in inner London, around 400,000 in inner London – east, and 350,000 in inner London – west. There continues over the night to be more journeys on public transport to inner London – east than anywhere else. Only in the early morning peak (and journeys starting before 12.30pm) are there more journeys to somewhere else, and that is inner London – west, see Figure D.5.

²⁹¹ Analysis is for Wednesday 10 January 2018

Figure D.5: Numbers of journey destinations on public transport in London and sub-regions in two-hour slots on a weekday

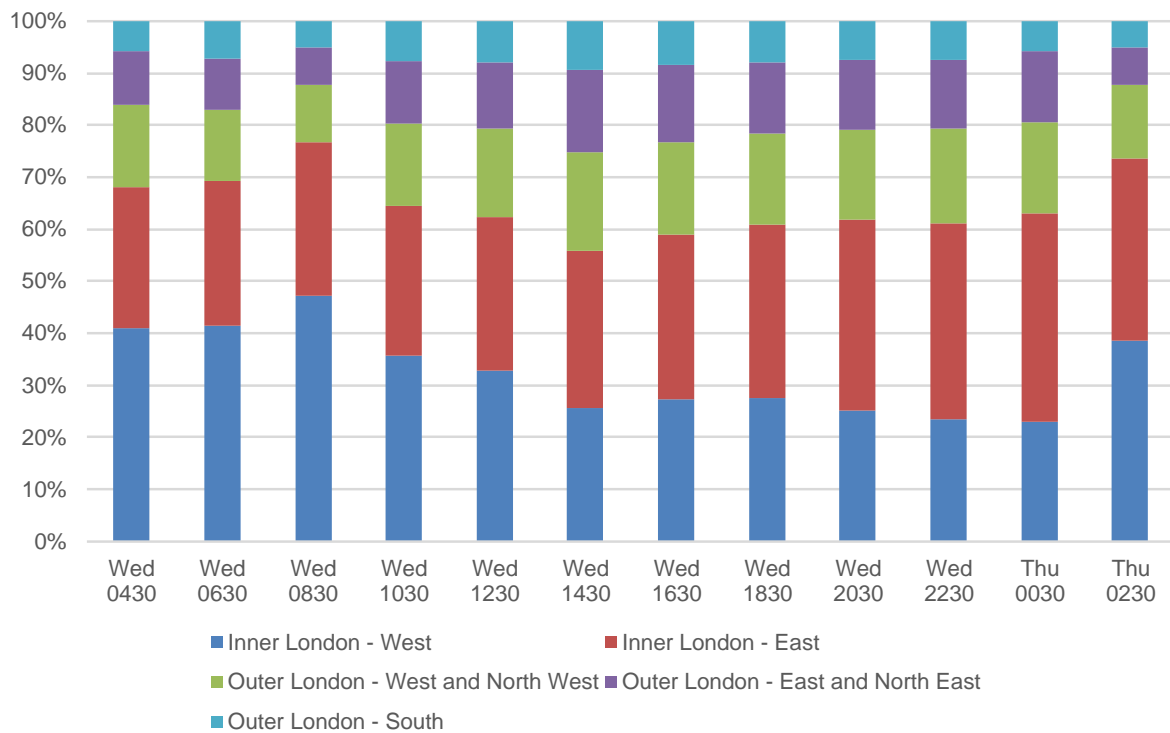


Source: GLA Economics analysis of TfL data

Note: two-hour slots are when journey started, and ending is where this is known

Across all times in the day, over 55% of journeys, where the destination is known are to inner London, Figure D.6.

Figure D.6: Distribution by London sub-region of journey destinations on public transport in two-hour slots on a weekday



Source: GLA Economics analysis of TfL data

Note: two-hour slots are when journey started, and ending is where this is recorded

Across London 23% of journeys, where a destination is recorded, start between 6.30pm and 6.30am. The proportion is similar for the sub-regions with the exception is journeys to inner London - west where the proportion is 19%, Figure D.7.

Figure D.7: Distribution of journey destinations on public transport for London and sub-regions in two-hour slots on a weekday



Source: GLA Economics analysis of TfL data

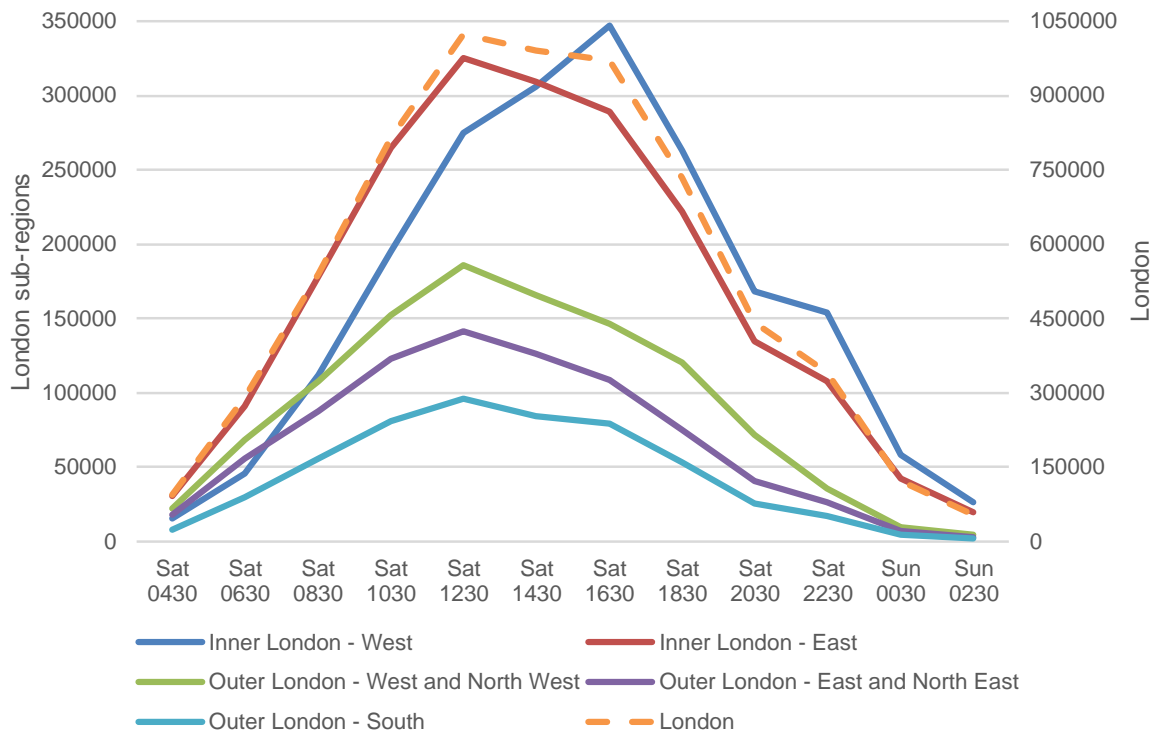
Note: two-hour slots are when journey started, and ending is where this is known

D.5 Departures by London sub-region at a weekend²⁹²

The busiest time on a Saturday is between 12.30pm and 2.30pm when over a million journeys start in London on public transport. At this time, more journeys start in inner London – east than elsewhere at around 325,000. As the day progresses the number of journeys started falls for London as a whole and the sub-regions. The exception is inner London – west when the number of journeys started is highest between 4.30pm and 6.30pm, at around 350,000. Throughout the rest of the day more journeys are started in this area than other parts of London, see Figure D.8. For example, between 8.30pm and 10.30pm around 440,000 journeys start, 170,000 in inner London – west, and 135,000 in inner London – east.

²⁹² Analysis is for Saturday 13 January 2018

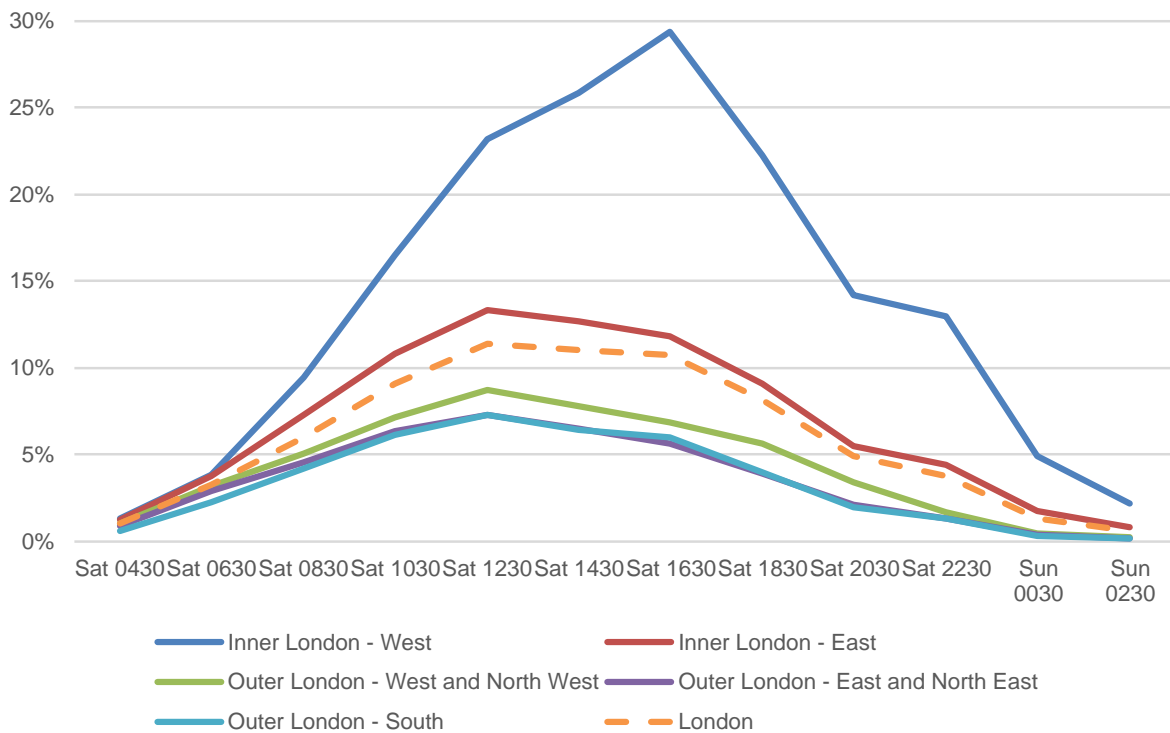
Figure D.8: Numbers of people starting journeys on public transport by London and sub-regions in two-hour slots at a weekend



Source: GLA Economics analysis of TfL data
Note: two-hour slots are when journey started

Figure D.9 is as for Figure D.8 except it weights the number of journeys started in an area by the resident population. Throughout the day this weighted ratio of journeys started is highest in inner London – west. At its peak the ratio is 29% for inner London – west for journey started there between 4.30pm and 6.30pm, falling to 14% between 8.30pm and 10.30pm. The comparable figures for the whole of London are 11% and 5%.

Figure D.9: The proportion of people starting journeys on public transport weighted by resident population for London and sub-regions in two-hour slots at a weekend



Source: GLA Economics analysis of TfL data and GLA household and population projections²⁹³

Note: two-hour slots are when journey started

Another way to consider the data is the proportion of journey starts on public transport for each sub-region of London over the day, see Figure D.10. Between 4.30am and 8.30am over half of journeys start in outer boroughs, and this proportion falls over the rest of the day. From 4.30pm onwards the proportion of journeys starting in inner boroughs is 65% and over, and between 00.30am and 4.30am it is over 80%.

²⁹³ Figures are 2018 estimate from 2016-based central variant. See [GLA Population and Household Projections](#)

Figure D.10: Distribution by London sub-region of people starting journeys on public transport in two-hour slots at a weekend



Source: GLA Economics analysis of TfL data
Note: two-hour slots are when journey started

Across London 28% of journeys start between 6.30pm and 6.30am. Only in inner London – west of the sub-regions do a higher proportion of journeys start between these hours at 35%. The proportion for all the outer sub-regions is somewhat lower than for London, and for outer London – south, and outer London – east and north east it is close to 20%, Figure D.11.

Figure D.11: Distribution of started journeys on public transport for London and sub-regions in two-hour slots at a weekend



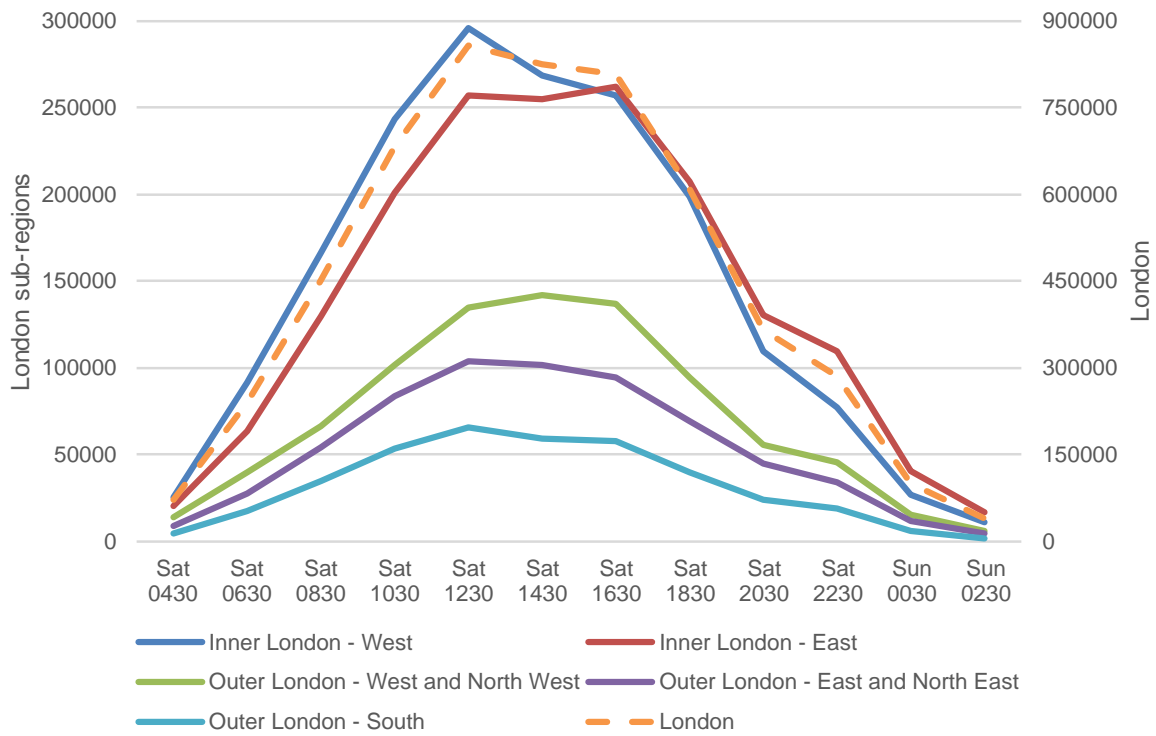
Source: GLA Economics analysis of TfL data
Note: two-hour slots are when journey started

D.6 Arrivals by London sub-region at a weekend²⁹⁴

There are around 860,000 people starting a journey in London on public transport between 12.30pm and 2.30pm where the end point is known. Around 0.55 million of these journeys end in inner London, around 300,000 in inner London – west, and 250,000 in inner London – east. From 4.30pm onwards there are more journeys to inner London – east, although the trend and numbers over the remainder of the day are very similar to that for inner London -west, see Figure D.12.

²⁹⁴ Analysis is for Saturday 13 January 2018

Figure D.12: Numbers of journey destinations on public transport in London and sub-regions in two-hour slots at a weekend

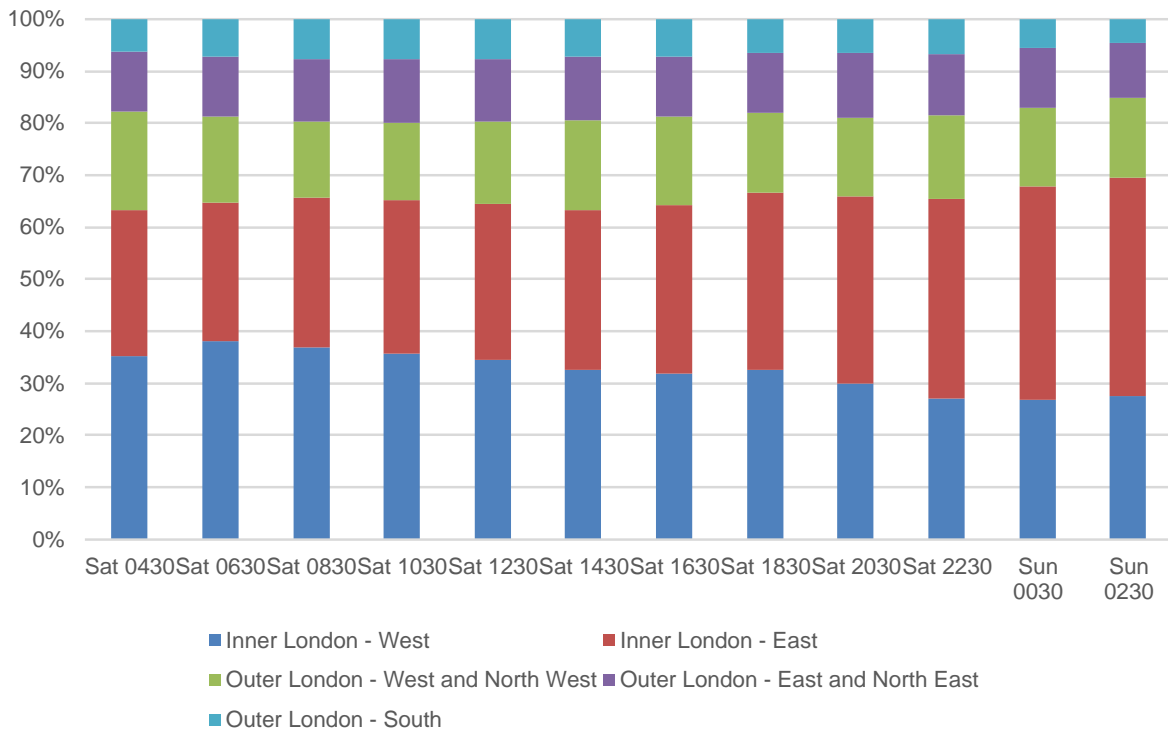


Source: GLA Economics analysis of TfL data

Note: two-hour slots are when journey started, and ending is where this is known

Across all times in the day, around 65% of journeys, where the destination is known are to inner London, Figure D.13.

Figure D.13: Distribution by London sub-region of journey destinations on public transport in two-hour slots at a weekend



Source: GLA Economics analysis of TfL data

Note: two-hour slots are when journey started, and ending is where this is known

Across London 28% of journeys start between 6.30pm and 6.30am, where destinations are known. The proportion of journeys during these hours to each sub-region starting between these times is similar, the highest being journeys to inner London – east at 31%, and the lowest being outer London – south at just under 25%, Figure D.14.

Figure D.14: Distribution of journey destinations on public transport for London and sub-regions in two-hour slots at a weekend



Source: GLA Economics analysis of TfL data

Note: two-hour slots are when journey started, and ending is where this is known

D.7 Summary

This annex provided an analysis of public transport journeys in London by time of day for a weekday, a Wednesday, and at the weekend, on a Saturday.

The starting point for most journeys is inner London, this is also the part of London where most journeys end:

- Only between 4.30am and 6.30am on the Wednesday did more than half of journeys start in outer London
- Only between 4.30am and 8.30am on the Saturday did more than half of journeys start in outer London

Inner London – west is markedly more important for journeys, whether starting or ending, than other parts when weighted by resident population. Inner London – east is also more important than other parts of London in this respect. This indicates the importance of these areas as a destination for non-residents at all times of day, and so across the reasons for travel of commuting, leisure and recreation, and shopping.

The peak time for journeys to start on the Wednesday was between 4.30pm and 6.30pm when around 1.5m journeys started, and on Saturday the peak was 12.30pm to 2.30pm when around 1m journeys started. The number of journeys declined over the rest of the day.

On the Wednesday, a quarter of all journeys started between 6.30pm and 6.30am. Between 8.30pm and 10.30pm around 460,000 journeys start, 215,000 in inner London – west, and 135,000 in inner London – east.

On the Saturday, 28% of all journeys started between 6.30pm and 6.30am. Between 8.30pm and 10.30pm around 440,000 journeys start, 170,000 in inner London – west, and 135,000 in inner London – east.

Annex E: Estimating the costs and benefits of night time activities

E.1 Introduction

In recent years several attempts have been made to measure the pros/benefits and cons/costs of night time activity in London and other cities. Mostly these studies measure gross costs, and have faced significant issues both in terms of measurement and attribution of effects. The most systematic attempt to quantify these effects has been by GLA Economics in relation to alcohol consumption²⁹⁵.

The analysis of this section draws from:

- HM Treasury Green Book²⁹⁶ on how to appraise policies, projects, and programmes
- HM Treasury Magenta Book²⁹⁷ on what to consider when designing an evaluation

Appraisal and evaluation are central components of cost-benefit analysis.

E.2 Summary of findings from cost/benefit studies for London

E.2.1 Economic cost-benefit analyses

An economic cost-benefit analysis should compare like-with-like. That is the costs and benefits should be associated with the same activity.

There are four published studies which estimate the costs and benefits of night time activity in London, or parts of the city:

- the 2012 GLA Economics report
 - This estimated that alcohol-consumption in London's night time economy alone generated between £1.6 billion and £1.9 billion in benefits a year. This compared to estimated costs (for those which could be calculated) of between £214 million and £285 million a year. The total net economic benefit for London was, therefore, around £1.3-£1.7 billion per annum; while for each £1 cost incurred there was a benefit of £5.50-£8.80.
 - By far the largest single cost to London from alcohol-consumption in the night time economy was from crime associated with alcohol consumption at night; yet this was far outweighed by the economic output generated. Moreover, while estimated net economic benefit from alcohol consumption varied for individual boroughs (ranging from £6 million per year in Barking and Dagenham to a potential £399 million in Westminster), the benefits attributed to alcohol consumption at night were found to outweigh the costs across all London boroughs.

²⁹⁵ See [Working Paper 55: Alcohol consumption in the night-time economy | London City Hall](#)

²⁹⁶ See [The Green Book: appraisal and evaluation in central government - GOV.UK](#)

²⁹⁷ See [The Magenta Book - GOV.UK](#)

- a 2013 report²⁹⁸, *Lambeth After Dark*, by The Association of Town & City Management, TBR and MAKE Associates
 - This estimated the benefit cost ratio for Lambeth at 5.4:1.
- a 2015 study for Westminster City Council²⁹⁹, *Westminster Evening & Night Time Economy*, by TBR
 - This estimated the total costs of the evening and night time economy (linked to public health, transport, police and local authority) at £187 million in 2013. This compared to total benefits – including from direct sales – from leisure based services equal to £3.2 billion.
- a 2017 report³⁰⁰, *Hackney's Evening and Night Time Economy – a Cost Benefit Analysis*, by Ortus Economic Research
 - This estimated the total costs for the local authority (including costs to the police and justice system, the NHS and costs to the borough council) to total £23.5 million. Again, however, the estimated benefits of the Hackney ENTE – estimated to total £93.2 million – far outweighed this

These studies all have limitations both conceptually, and in terms of the measurement of costs and benefits, which is set out in this Annex.

Section E.4 lists costs and benefits of night time activities which are non-financial in nature, such as fear of crime or the value of creating and maintaining relationships. While there are techniques which can value these effects mostly estimates do not exist. The GLA Economics study made allowance for these effects, where there was quantification, but none of these studies quantify all the costs and benefits of going out at night.

E.2.2 Valuing the night time economy

An alternative approach is to place a value on the night time economy, and not attempt to measure related costs. A study for London First³⁰¹ values it at between £17.7 billion and £26.3 billion in 2014³⁰². The range gives a sense of the uncertainty in the attribution of sectors to night time activity. This is a legitimate valuation approach, and while conceptually more straightforward than a cost-benefit analysis there can be measurement issues.

The starting point of that analysis, and the analysis in this report at Chapter 3, is the attribution of jobs to night time activity. Employees who work at night quite frequently also work during the day, and it is much more common for there to be shift work in the sectors where the prevalence of night time work is more common. Data on output by sector is not available by time of day worked, and so there is no robust way to attribute the share of sector output to night time work. For this reason, GLA Economics has not produced a value of the Night Time Economy.

²⁹⁸ See [Lambeth after Dark](#)

²⁹⁹ See [Evening and Night Time Economy | Westminster City Council](#)

³⁰⁰ See [Hackney's Evening and Night Time Economy](#)

³⁰¹ See [London's 24 hour economy](#)

³⁰² There is also an attempt to measure indirect impacts, which brings the estimate up to £40.1 billion

E.3 Issues with existing cost-benefit studies of the night time economy

E.3.1 The counterfactual

Economic cost-benefit analysis is normally applied to an intervention. That is, it seeks to provide a comparison of the outcomes from a given intervention, and associated costs and benefits, with what would have happened anyway, the counterfactual.

The specification of the counterfactual is a key element of cost-benefit analysis. None of the London cost-benefit studies for night time activities specify a counterfactual. This is why the 2012 GLA Economics report talks of pros and cons, and it is not simple to provide an interpretation of the results. It states clearly that it is not a cost-benefit analysis:

“This work is essentially a stock-take or snapshot of the pros and cons of alcohol-consumption in the NTE. It is not a cost-benefit analysis in the traditional economic sense, ie it does not allow for a full understanding of the net benefit of the industry against an alternative, eg where there was less/no alcohol-consumption in the NTE. This means that some of the pros (or benefits) that are considered in this work may not be lost if alcohol-consumption in the NTE was reduced or eliminated. For example, in this work the value of the industry (alcohol consumption in the NTE) is estimated, however, if the industry was eliminated (ie there was no alcohol-consumption in the NTE) this value would not necessarily be lost completely. It is likely that, over time at least, the inputs (raw materials, land, staff etc) would be re-diverted to produce another valuable good/service in the economy (and so produce value).”

There are very few examples of economic evaluations of night time activities, see Annex C.

One approach, often adopted for cost-benefit appraisal and evaluation, is to have a theory of change, and establish prior expectations of what might happen through interventions. The 2012 GLA Economics research on alcohol consumption in the NTE³⁰³ provided a routine activity theory to identify high-risk crime situations, provided in this paper for convenience at Box 8.3.

This type of approach can:

- support the design of interventions with prior expectations of what might change
- and so, help define that activities that should be measured, including the associated costs and benefits
- estimate the net effects of a proposal through quantified estimates of the costs and benefits of the proposal

The measurement of costs and benefits can be done both as part of appraisal to justify an intervention, and as part of evaluation to assess whether expectations were met.

While the GLA Economics research does not provide cost-benefit analysis of interventions it does present a list of policy tools which can be used to minimise the harms associated with alcohol consumption in the NTE.

³⁰³ [Working Paper 55: Alcohol consumption in the night-time economy | London City Hall](#)

E.3.2 Measurement and attribution

E.3.2.1 Cost-benefit framework

The broad approaches of the cost-benefit reports for the night time economy in London are similar:

- Measures of benefits may include:
 - An assessment of output attributable to night time activity, and for the GLA report specifically alcohol-related night time activity
 - An element of tourist income on night time activity³⁰⁴
- Measures of cost, which are typically attributed to alcohol consumption, around:
 - The costs of crime, including drink driving, which by a narrow measure is police and criminal justice system costs, including victim services, and health-related costs for victims, but can also include
 - security costs, and insurance
 - monetary estimates of the physical and emotional impact on victims
 - the value of stolen, damaged, or destroyed property
 - Local authority costs around street cleaning, and maintaining the public realm
 - Lost output from days lost from work for businesses, people committing the crimes, and their victims
 - Hospital and ambulance costs from acute alcohol-related illness
 - There may be associated losses to the individual affected from reduced wellbeing, days lost from work, and time not spent on alternative leisure activities

Licensing fees are an economic activity, as there is work involved in processing applications, it is possible that fees reflect costs and so there is no associated benefit to local authorities.

These are resource effects, for which there is a financial cost. GLA Economics also attempted to pick up wider, non-financial, measures of costs and benefits, while other studies tended to focus on the costs of delivery of public services.

E.3.2.2 Estimating quantifiable costs and benefits

In measuring benefits, there are definitional issues around sectors where there is alcohol consumption:

- GLAE looked at the accommodation, and food and beverage industries
- Other London cost-benefit studies use the Night Mix Index

In measuring costs of alcohol-related night time activities there is another set of issues.

First, there are recording issues in identifying alcohol-related crime, ambulance callouts, and provision of hospital services. Accurate reporting may not be a priority for staff delivering public services at the time of incidents, and it may not be clear if an incident was alcohol-related. Chapter 8 and Annex F discuss some of the specific issues for crime reporting and recording.

Second, there are attribution issues around linking the use of medical services to alcohol misuse. There is a distinction between prevalence-based estimates around all effects of alcohol misuse,

³⁰⁴ There would be double counting if it included the benefits to businesses as captured in their output

and incidence-based estimates³⁰⁵. It is possible that a hospital admission might reflect the accumulated effects of alcohol misuse, or might happen after a night out.

Third, data is not available in the most convenient form. For example, budgets for the police or NHS will be publicly available, but typically it will not be known outside these organisations how budgets are spent. Cost-benefit analyses tend to rely on historic studies of the past allocation of expenditure, and deriving the particular sub-analyses of interest may require the use of multiple data sources. The methodology section to the 2012 GLA Economics report sets this out thoroughly and clearly.

In summary, there is a set of significant issues in measuring the costs and benefits of night time activities. Annex B discusses some of the opportunities of anonymised big data in addressing some of these issues.

E.3.2.3 Non-financial effects

There is no market value for some of the adverse alcohol-related effects of night time activity. The 2012 GLA Economics report provides some examples:

- Physical and emotional impact on victims of crime
 - There are methods to place monetary values on these effects, and the GLA Economics report provided a valuation of the physical and emotional impact on victims of crime using Home Office analysis.
- Fear of crime
 - The report also referenced a report into the economic and social cost of the fear of crime³⁰⁶. The results of this analysis were not used by GLA Economics because the direction of causality between health and fear of crime is not clear. It is not clear whether being in fear of crime causes poor mental health or whether poor mental health causes a higher fear of crime.
 - Safety is an important barrier to going out at night for some groups, see Chapter 8, so the lack of valuation of these effects in studies is a significant gap in cost-benefit analyses.
- Noise pollution
 - The Department for Environment, Food, and Rural Affairs (DEFRA) has commissioned a study to value noise pollution³⁰⁷. This work could not be used in this context as it values the effects of road, rail, and air disturbance, rather than rowdiness, which is the consequence of night time activities.
- Chronic alcohol illness
 - Where there are issues of causation where an individual might have drunk alcohol whether or not they went out
 - and issues of attribution to a particular event if an individual had a history of alcohol misuse
 - GLA Economics did not quantify these effects at the time because of lack of data
- Impact on family and relationships

³⁰⁵ See, for example, a 2003 Cabinet Office paper for a discussion [Alcohol misuse: How much does it cost?](#)

³⁰⁶ See [Estimating the economic and social costs of the fear of crime](#)

³⁰⁷ See [Noise pollution: economic analysis - GOV.UK](#)

- This was not quantified. The next paragraph considers potential positive impacts on family and relationships, which have also not been quantified

The GLA Economics report did also consider some positive non-monetary benefits of night time activity:

- Consumer surplus – this is a measure of the difference between the value to an individual of a good or service, and the price actually paid. The report included an estimate for this.
- Option value – this is the value that a person has for maintaining or preserving a service, even if there is little or no likelihood of them using it eg a resident may want to have a local pub in case there was a time when they would want to go. Not estimated in the report.
- Social capital benefits – this is taken loosely to be the value (eg health, employment opportunities, or social cohesion) of creating and maintaining social networks and relationships (including with family) which can be facilitated with alcohol. This is additional to consumer surplus. It is not estimated in the report, but the most commonly mentioned positive associations with alcohol are socialising, relaxing, and pleasure³⁰⁸.

Existing cost-benefit studies of London night time activity all do not include estimates for a range of the non-financial costs and benefits which would be important for a full assessment, assuming a counterfactual could be defined.

E.4 Gainers and losers

As economic cost-benefit analyses have a comparison with what would have happened otherwise it is possible to provide a distributional analysis of gainers and losers. It has already been mentioned that many of the costs and benefits are non-financial, and so difficult to quantify.

There are some broad conclusions that can be drawn:

- In financial terms the main tax revenue stream from night time activities is alcohol taxes, and the immediate costs are also primarily incurred by central government in the form of police³⁰⁹ and NHS costs
- There is no simple way to attribute way the income of businesses to night time activities because, as mentioned earlier, there is no data source which allows a robust split of activity by time of day. Further, the counterfactual is not known, ie it is not known what business would occupy a premise if it could not provide services during the night, and so the additional profits and taxes of a business which does offer these services
- The main tax revenue from night time activities is alcohol taxes, and the immediate costs are also primarily incurred by central government in the form of police and NHS costs
- Local authorities incur costs through street cleaning and maintenance of the public realm, which it funds from its general income

³⁰⁸ For more information, see the 2003 Cabinet Office paper, [Alcohol misuse: How much does it cost?](#)

³⁰⁹ The London Assembly Budget and Performance Committee reports that the Metropolitan Police has a budget of £3.269 billion for 2017/18 of which 70% is provided by the Home Office, 19% from the Mayor of London, and 11% from the income and reserves of the Metropolitan Police, see [Police funding - who's paying the Bill? | London City Hall](#)

- At an individual level, the gainers, who enjoy going out at night, and losers, who face the rowdiness and disruptive behaviour are different. There is no market mechanism associated with these gains and losses, and as a result, intermediation is through a third party, which may be the local authority.

E.5 Conclusions

- There are a number of cost-benefit studies of London night time activity
- None of these are a proper economic cost-benefit analysis as they do not specify a counterfactual, and as a result the findings of these studies are difficult to interpret
- Existing estimates of the value of the output of night time activities are a more meaningful measure, although businesses run both day and night, and as there is no data source which can apportion activity by time of day. Consequently, GLA Economics does not provide an estimate in this paper for the economic value of night time activity in London.
- Alcohol consumption does not inherently link to crime. There is a theory of change, which suggests that other causal and environmental factors matter, and that policies can be developed to tackle them
- There are significant measurement challenges in linking police and NHS costs first to alcohol consumption, and second to alcohol consumption from night time activities in venues
- There are costs and benefits of night time activities which are non-financial in nature, such as fear of crime or the value of creating and maintaining relationships. While there are techniques which can value these effects mostly estimates do not exist, and so do not feature in published studies

Annex F: Limitations of police crime and ambulance service attendance data

F.1 Introduction and Summary

This Annex considers the police and ambulance service recording of crime, and alcohol-related crime. It does not consider the extent of reporting of crime in the first instance as not all crimes are reported. There are concerns that there is still under-recording for some offence types³¹⁰, which remain despite recognition of the issue and efforts to improve police recording over the last few years³¹¹.

Alcohol-related crime is almost fully-reliant upon a police officer or police staff member appending a feature code/flag upon the relevant crime report. Prior to 2017 recording of the alcohol-related nature of an offence was not mandatory for the police, nor was there a standardised definition available for what alcohol-related crime was³¹². The definition now in use is “any notifiable offence (crime) where it is perceived, by the victim or any other person, that the effects of alcohol consumption on the offender or victim was an aggravating factor”.

LAS would only classify an attendance as alcohol-related if alcohol contributed to the presenting condition.

As well as recording issues there are also recall issues, and some mis-reporting of the location of an incident.

The LAS data used in this report is publicly available, and the MPS data has been sourced through a data request to the MPS performance unit. All MPS data comes from a single source, although there are a number of different forms of access. Not all London local authorities have direct access to MPS data, and in consequence will not have access to recorded crime data by time of day.

This report does not include crimes reported to the British Transport Police, and those which occur in the City of London, which is outside the jurisdiction of the MPS.

F.2 Limitations in police and ambulance service recording practices

F.2.1 Under-recording issues

If the exact location of an offence is unknown, as the victim did not realise until they were home, and they lived outside London, the offence is likely to be coded to the location of the victim’s home address; thus, would not feature within the data documented in this report.

Some alcohol-related incidents may not feature within the police official statistics, due to being dealt with internally by security staff at premises such as a bar, venue or supermarket. Such incidents may in fact constitute an assault if the police are called out.

If the patient has left the scene prior to the arrival of the LAS, then the details on the ambulance computer aided dispatch (CAD) record may not be full, which may mean that the alcohol aspect of the incident is not captured.

³¹⁰ See [The nature of violent crime in England and Wales - Office for National Statistics](#)

³¹¹ See [Methodological note: Why do the two data sources show differing trends? - Office for National Statistics](#)

³¹² See Home Office [Counting rules for recorded crime - GOV.UK](#)

The time of the LAS records do not necessarily reflect the time of the incident. Variation is likely to be found between incidents of differing levels of seriousness. Those incidents that feature a greater injury are perceivably more likely to feature a dispatch time closer to the incident time. Variation may also be seen between who made the call for LAS to attend, whether it was the patient, an associate of the patient who is present, or a third party.

The victim may not be aware whether the suspect has been drinking prior to the offence. Which could mean that the contribution of alcohol to offending is either over-recorded or under-recorded.

A victim may not inform police that they have been drinking, for reasons such as fearing that they will not be believed by police if they have been drinking, thinking that they may be blamed for the offence because they have been drinking, or because they do not feel their drinking has any bearing to the offence.

Crime figures can reflect artificial fluctuations, such as when there is a drive to tackle certain types of crime, or to reduce the level of under-reporting amongst certain victim groups. Crime figures can also be affected by changes in Home Office crime classifications, the introduction of new laws, and the creation of new opportunities for crime.

The LAS data only covers patients that are admitted for treatment via ambulance. It does not cover patients that attend hospital by alternative means.

Some patients may not divulge that they have been assaulted if, for example, the injury was a result of domestic violence, or gang-offending. As such records may not fully reflect the true level of assaults. Some assaults may further end up being recorded as self-inflicted injuries based on what the patient has informed the LAS staff.

Since the analysis has been conducted, it is entirely plausible that offences that have been included have since been re-classified, 'No Crimed', or had an alcohol feature code added or removed, as a result of further investigations. Conversely, previously uncounted offences have since been 'Crimed', and, if the data search was run again, different crime reports would feature in the performance figures.

There is an assumption that duplicated LAS records which refer to the same incident are reconciled. So, when the records are de-duplicated, no vital information is lost.

F.2.2 Mis-recording of location issues

The location of an incident may have some accuracy issues – for instance, in the case of alcohol-related offending, the victim may not be able to identify the exact location of the incident.

In instances where the victim or patient is not local to the incident area, it may be that they are unable to clearly identify or recall the location of the incident. Therefore, there may be some inaccuracies in the reported borough location of the offence.

The location of the LAS pick-up does not necessarily reflect the location of the incident.

The data only includes those offences and LAS pickups that occurred within London. If something occurred on the border of London's boundaries, and was dealt with by a non-London authority such as Essex Police, it would not feature in this report.

If the victim does not know the location of the offence, then it is likely to have been coded to their home address as a default. This is relevant to those residing outside London and travelling in to London, as well as those who reside within London but travel outside.

The MPS rely on the most recent gazetteer for geocoding – this means that offences that have occurred on a recently constructed street, road, or housing estate may not feature in the crime figures.

F.2.3 Recall issues

For alcohol-related offences or incidents, and depending on the level of intoxication, the victim/patient may not know (or be able to recount) significant details of the incident. It may also be that they are unable to divulge full personal details to the police officer/ambulance crew member.

There may be a lag in the time taken for the victim to report the incident to the police, which can then in turn affect the level of recollection accuracy.

F.2.4 Other recording issues

The MPS performance data is usually based on ‘Recorded’ dates/times not ‘Committed on’ dates/times, which may lead to mis-interpretation of the data.

Not all increases in crime should be considered as a negative thing, such as increases in certain crime types after measures have been undertaken to increase reporting. It may therefore be that increased offending reflects a positive outcome, with victims feeling more comfortable in reporting the offence to police based on increased trust and public confidence.

Trends in LAS attendances over time may be affected by changes in funding, fleet sizes, and admission thresholds, and so trends may not reflect demand for services.

F.3 Police and ambulance service data availability and access

F.3.1 Data availability

Both LAS and MPS data are publicly available on the London Landscape website³¹³, as well as on the London Datastore³¹⁴. Individual records are aggregated to ward level. The LAS data in this report is from the London Landscape. A full historical catalogue/record of the LAS records dating back to 2006 can be accessed. The MPS crime data can be accessed additionally on the data.police.uk website. The MPS data used in this report comes from the same administrative data system as published data, but includes additional fields not publicly available.

The MPS Performance Unit supplied the data in response to a specific data request. The disseminated data file had additional elements, such as the time split, day, date for the offences, and the selection of offences was appended with an alcohol-related feature code on the crime report. This data may not be exactly the same as published sources. This is because the data comes from a live system and it might be subject to revision, so an extract is only correct at the point in time when it was created. The data output will differ if any data is added, removed, or edited in the queried data fields of a crime report, such as if:

³¹³ See [London Landscape | London City Hall](#)

³¹⁴ See [London Datastore – Greater London Authority](#)

- an offence classification has been amended, a crime has been transferred to/from another police force
- a crime report has been subsequently ruled in or out as a criminal investigation
- a crime report has been appended at a later stage with an alcohol-related feature code.

F.3.2 Data access

MPS and LAS data can also be accessed through SafeStats, a password-protected, secure web portal used by authorised Community Safety and Public Health professionals to query and obtain data pertaining to community safety issues, including crime and disorder. Within this system, users can access all record-level LAS call outs from 2006 to recent date (with an approximate six-week time lag), as well as an Assault subset, an Alcohol-related incident subset, and a Drug-related incident subset. The LAS fields used within this report all feature within the SafeStats datasets; with the additional benefit on SafeStats of the presence of further fields, such as the times/days of the call outs, illness classification codes, and details of the hospital where the patient was taken. With regards to the MPS data, the users cannot access anything additional in the SafeStats system compared to the other modes of publicly-available access, although SafeStats data is available back to 2001.

The MPS data may also be accessed directly by authorised Community Safety personnel through an MPS-sponsored remote terminal, or through the utilisation of a computer terminal within an official police building. Most London local authorities have this form of access, which allows them to analyse crime activity by time of day.

GLAECONOMICS

Greater London Authority
City Hall
The Queens Walk
London SE1 2AA

Tel 020 7983 4922
Fax 020 7983 4674
Minicom 020 7983 4000
Email glaeconomics@london.gov.uk

<http://www.london.gov.uk/gla-economics-publications>

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