

Economy Committee

This document contains the written evidence received by the Committee in response to its Call for Evidence, which formed part of its investigation into London’s Night Time Economy.

Calls for Evidence are open to anyone to respond to and the Committee published a number of questions it was particularly interested in responses to as part of its work, which can be found on page 2. The Call for Evidence was open from 22 July to 6 September 2024.

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Questions asked by the Committee

- 1) To what extent has London's night-time leisure sector recovered from the pandemic?
- 2) What are the most significant challenges confronting London's night-time leisure sector currently?
- 3) To what extent is London a good place to operate in as a nighttime economy business?
- 4) What are the needs of London's night-time leisure workforce and to what extent are they currently being met?
- 5) Are there any groups of people which are likely to feel excluded from London's night-time economy? If so, which groups are they and why?
- 6) What impact have the actions of the Mayor and Night Czar had in supporting London's night-time economy?
- 7) What further action could the Mayor and Night Czar take to support London's night-time economy?

Attis, Ref No. 001

Executive Summary

This short submission proposes a mission-led approach to reverse the apparent decline in London's night time leisure economy and instead create and manage a world-class, 24hr clubbing sector based on one or more International Centres for Entertainment.

1. The Attis approach to the night time leisure economy

1.1 Attis is a town centre vitality agency that takes a mission-led approach to issues that impact on the vibrancy, viability and sustainability of town and city centres. Whereas the traditional issues-led approach looks at issues in silos – licensing, security, planning, etc – our mission led approach sets a mission and creates a mission team comprising experts in all the elements required to achieve that mission.

1.2 This mission-led approach allows Attis to respond innovatively and effectively to many different types of challenges faced by town and city centres.

1.3 Attis directors have experience of working with the late-night leisure economies in Bristol and London. Managing Director Paul Barnes has worked for club operators in Southwark, Shoreditch and Soho. Place-Making Director Leighton de Burca is a key figure in Bristol's night-time economy and on national policy issues Security Director Tony Nash advises clubs throughout London.

1.4 While our submission responds to an inquiry into the late night economy, our experience leads us to treat the night time leisure economy as part of a wider 24 hour experiential economy

The focus of our submission the Committee

2.1 The first six of the committee’s questions are designed to enable a greater understanding of the current state of London’s late night leisure sector and the issues it faces. We have others who operate in the sector to give their views on the current state of the sector in London. The focus of our submission is on the final question which asks what further action the Mayor and Night Czar could take to support London’s night-time economy?

The importance of the late-night leisure economy to London

3.1 London is a global megacity which strives to be a great place to live, work and visit. It competes with cities worldwide for investment, talent, students and visitors. It supports traditional and emerging business hubs. It is for others to produce research into the ideal mix of attractions that make a city a global destination, but clearly a vibrant night-time economy plays some part in that mix.

3.2 When working on a campaign for Ministry of Sound some years ago, one fact that stood-out was from GLA research which stated that on Friday and Saturday evenings, more people go clubbing in London than the combined number of visitors to all of the top ten London tourist attractions in a whole week. COVID-19 and other factors have resulted in declining club attendance since then but this remains a striking figure and illustrates the relative scale of London’s clubbing sector.

3.3 Many of the attractions that make London such an appealing city to live, work and visit survive and prosper with little proactive government input but in a benign regulatory system. These include our shopping districts, world class restaurants and hotels, commercial theatre and elite sport. Others receive active support from government such as national opera, ballet and theatre; museums and galleries; parks; universities; and historic buildings. Yet London’s clubs operate in a unique environment of little proactive government input but in a regime of strict licensing regulations which often pitch individual businesses against local authorities, the police and other regulators in a relationship which can turn confrontational to the detriment of individual businesses and the sector as a whole.

3.4 We have not seen updated research into the scale, value and importance of the clubbing sector both to people living in London and those visiting it. While this is an insights gap that needs to be filled, we can assume that the clubbing sector is still valuable and should be valued.

3.5 London’s late-night clubbing industry is not effective as a united sector to promote its importance and issues to policy makers to push for a more positive operating environment. It has been difficult to get club operators to work together for reasons they can explain, but the need for a united effort to persuade policy makers to recognise the importance of the sector and the need for a more positive approach to relationships is hindered by the lack of a united voice from London club operators.

3.6 Most other sectors have more effective industry champions to promote their cause. This is not in any way belittling the hard work and efforts of the sector’s key promotion elements who do the best possible in a difficult environment. The Night Time Industry Association does an amazing job promoting the UK wide industry on all types of policy and practical issues but this wide scope stretches its limited resources. Similarly UKHospitality is a hugely effective national trade body but its work for late night leisure is limited by the competing priorities of its mainly hotel, pub and restaurant members. The Mayor’s Night Time Tzar and her team are great

champions of London's late-night clubs but the restricted strategic role and powers they have means they often get blamed for developments out of their control and remit.

3.7 The Mayor's commitment to create a London Nightlife Task Force and Nightlife Fund are good opportunities to bring together the public and private sector players. In keeping with the new government's mission-based policy making we would hope that the Mayor will set a clear, challenging but achievable mission with agreed outcomes within realistic timescales. London doesn't need a talking shop for complaints, interesting reporting updates and engagement for engagement's sake. There is the opportunity to

3.8 In response to this inquiry we have produced the Attis Ten Point Plan as a suggestion of how this mission-led approach might work. We focus on the creation and management of one or more world class districts within the CAZ, which we have called International Centres of Entertainment (ICE), which will maintain and enhance London's global reputation.

3.9 There are a number of existing globally renowned venues in London that are not concentrated in any particular area. These have already helped establish London's reputation and we would hope that their operators would join the Mission Team both to contribute to the International Centres for Entertainment and to ensure that they benefit from the overall growth of this sector.

3.10 Clearly there are also local neighbourhood late night leisure businesses throughout London, but they are not the focus of our evidence, although lessons learned from the International Centres of Entertainment can help in the development and management of the sector throughout London.

4. The Attis Ten Point Mission Plan

4.1 The Attis Ten Point Mission Plan aims to revitalise the evening and night time leisure economy so that it contributes to growth, adds to London's appeal to those who live, work and socialise here and continues to attract visitors, talent, investors, innovation and students from around the world.

4.2 In addition to existing or future local neighbourhood night time leisure economy activities, the Mission Plan focuses on the creation of one or more International Centres of Entertainment in the CAZ.

Adopt a Mission, such as "to make London the World's best destination for late night leisure", based on measurable, challenging but achievable indicators including quality, scale, mix, diversity, value, safety, harmony and innovation and with realistic timescales agreed.

4.3 The ten points of the Attis Mission Plan are : get all the key players working together, not in conflict over regulations and opposing views, but to contribute their expertise and to cooperate in devising and delivering innovative but practical ways of achieving the mission set by the Mayor.

i) Adopt a Mission, such as "to make London the World's best destination for late night leisure", based on measurable, challenging but achievable indicators including quality, scale, mix, diversity, value, safety, harmony and innovation and with realistic timescales agreed.

ii)

Create a Mission Team comprising all the necessary expertise and experience to work together positively as a partnership of interests, all focussed on achieving the Mission. The Mission Team should include experts in local authority regulatory services (particularly licensing and planning), policing, property ownership, operation of clubs and related venues, hospitality,

security, transport, recruitment and training, tourism, branding and marketing and partnership creation.

iii)

Determine what data is required to ensure that the delivery of the mission is evidence led; collate existing data; and commission any necessary additional research to a) justify the mission b) inform the mission delivery and c) benchmark progress.

iv) Identify one or more suitably located night time leisure experience economy areas as International Entertainment Centres and adopt planning and licensing responsibilities and policies that reflect the specific regulatory and management requirements necessary to achieve the Mission.

v) Concentrate late night leisure in areas with few residents and if new residential applications subsequently arise, legally ensure that they cannot detract from the primary purpose of the late night leisure area.

vi) Integrate the late night leisure sector into the wider local 24 hr experiential economy – including accommodation, transport, hospitality, leisure, shopping, heritage and culture - to create the best experience.

vii) Reimagine buildings and use them as 24 hr live venues for new talent to attract the best and the best potential from around the globe.

viii) Grow diverse markets and make everyone safe with integrated night time safety strategies, particularly for women, harnessing new technologies and coordinating police and private security.

ix) Establish a London night time academy, funded by the Mayors AEB and the proposed Skills and Growth Levy to create an unrivalled night time service for customers and career opportunities for employees.

x) Create a learning lab to constantly monitor and learn from the best in the world to identify, lead and respond to emerging trends and new formats.

5. A new approach to the creation and management of London's late-night economy

5.1 We believe this Mission-Led approach provides a new and dynamic structure which will encourage all partners to work together, contributing their expertise and regulatory and legal powers, to create and manage a world-leading late night leisure sector in London

5.2 Furthermore, we believe that this sector should be integrated into London's wider 24hr experiential economy to continue to attract the residents, visitors, talent, student, investment and ideas of the future.

Equity, Ref No. 002

Response to London Assembly Call for Evidence: London's Night-time Economy

About Equity

Equity is a trade union of 50,000 performers and creative workers, united in the fight for fair terms and conditions across the performing arts and entertainment industry. Our members are actors, circus performers,

singers, dancers, designers, directors, models, stage managers, stunt performers, puppeteers, comedians, voice artists, and variety performers. They work on stage, on TV sets, in film studios, recording studios, night clubs and circus tents, and are largely treated as self-employed.

Summary

The majority of Equity members do at least some of their work in what the London Assembly defines as the night-time economy. Equity has longstanding industrial relations with London theatres and particularly high rates of membership density among performers and stage managers in central London theatres, approximately 80%. Other key areas of night-work for our members in London include drag, cabaret and variety performance. This submission focuses on some of issues of greatest concern to our members working at night. Chief among them is the ongoing pattern of closure of venues in London, particularly small and LGBT+ venues, who are extremely vulnerable to rising rents, spiralling business costs and redevelopment. Health and safety is another concern for our members, both in terms of their physical safety while working and travelling to and from work, and the psychosocial impacts of unsociable hours and overwork. Low pay and income insecurity is characteristic of work in the performing arts, with members in smaller theatre and drag and cabaret venues experiencing particularly poor conditions. All of this is in the context of the immense impact of the pandemic on performing arts workers, many of whom were ineligible for government support, far more of which went to venues. Many left the industry as a result, particularly those already most underrepresented.

1 Closure of venues

Our members in London rely on an ever-dwindling number of venues in which to work. While London's West End has bounced back strongly from the pandemic, with audience numbers outstripping their pre-pandemic peak,¹ the story for smaller venues – which account for the majority of work – is bleaker. The decline of London's LGBT+ venues, in particular, is well documented by the Greater London Authority's own data: the city lost 6 in 10 LGBT+ venues between 2006 and 2022,² including iconic venues like Madame Jojo's, Black Cap and The Joiners Arms.

In an industry where precarity is the norm, these venues are particularly important for offering a degree of income security to drag and variety performers. Many performers are able to get a regular gig at these venues,

such as a weekly show, which provides regular and reliable income alongside other types of work, such as private events or festivals, which may be more fluctuating. Such venues are also a vital incubator of talent: they provide a safe space for young performers to develop their act, experiment and grow as a performer.

The pressures on LGBT+ venues are well known: spiralling operating costs and rent, intense pressure from property developers on landlords, falling disposable income among customers, and challenging licensing regimes. The Glory, a venue which quickly became an East London LGBT+ institution, was forced to close in January. Property developers on the site had wanted The Glory to remain but it would have required changes which would have made the venue unviable, including a reduction in size and having to use portable toilets.³ The pressure from property developers to turn valuable sites into lucrative housing developments represents one of the biggest threats to the future of small performance venues, including LGBT+ spaces.

Equity has seen this most recently with the ongoing campaign to save Bethnal Green Working Men's Club (BGWMC).⁴ After 21 years as a venue largely dedicated to drag, cabaret and LGBT+ performers, the owners decided they wished to sell the venue. Equity launched a campaign to save the venue, including a petition which attracted 12,000 signatures in less than a week and a rally of over 100 people outside the venue.⁵

Since then, the campaign has so far followed a path familiar to those of previous campaigns to save venues such as the Black Cap and the Joiners Arms. Tower Hamlets Council has designated BGWMC an Asset of Community Value (ACV), which protects the current use of the space and, in the event of a sale, gives the community first option to raise the funds to buy it. The Joiners Arms, a much loved East London LGBT+ venue until its closure in 2015, also gained ACV status, yet the site has remained unused and derelict because the restrictions that come with ACV status make development on the site less attractive and profitable for the developer.⁶ There is, therefore, a need to recognise planning restrictions can only go so far in protecting venues. The Mayor and local authorities must consider how they can actively support venues where they are threatened with closure, such as by supporting community groups to raise funds to purchase venues and intervene at an earlier stage to support venues. The GLA has a responsibility to monitor and advocate for national government support for the arts and entertainment in the capital.

The situation is also urgent for theatres. Even historic and well-established theatres are in an incredibly precarious position. Hampstead Theatre, for example, was hit with a 100% cut to its Arts Council funding in 2022, after the government directed the Arts Council to move funding outside of London,⁷ throwing its future as a theatre of new writing into serious doubt. The current pressures on small venues and their serious vulnerability raise the risk that some types of venues may cease to exist entirely if urgent action is not taken. Not only will our members lose vital places and sources of work if venues disappear; London will not remain the diverse and culturally vibrant city for which it is world-renowned and which make it an attractive place to live.

2 Safety and night-time work

Physical safety and risks of harassment

Working at night comes with an array of risks to performers' health and safety. The risks are perhaps most acute for LGBT+ performers, who work in the context of rising homophobic and transphobic violence. These performers risk harassment and abuse just to get to their place of work. To make matters worse, small venues sometimes fail to provide adequate dressing room facilities, such that drag artists are faced with the choice of either travelling to the venue in drag and risking violence, or taking a taxi at their own expense to the venue. Whereas on Equity's West End Agreement, producers are required to arrange taxi transport in the event public transport is not operating, drag artists have no such provision to rely on for their safety.

For performers in theatre, there is an increasing trend of harassment and abuse at stage doors. Some productions are now even hiring security for stage doors due to incidents, such as misogynistic comments directed at women performers or performers being followed out of the venue. Of course, there is a duty on employers to ensure the safety of performers whom they engage and Equity continues to raise these issues with them.

Overwork and psychosocial impact of night work

Recent research by academics at Anglia Ruskin University and University of Greenwich, which Equity participated in, demonstrates the particular psychosocial impact associated with night work.⁸ Psychosocial impact describes the compounding effects of unsociable and long hours, risks of harassment, excessive workloads and fatigue on workers.

Demands on performers and stage managers in theatre are incredibly high. Total working hours for a performer will generally exceed 44-48 hours per

week across six days, including one or both weekend days. Many shows are highly physical, such as musicals involving dance routines and singing. Performers and stage managers are typically contracted to work eight shows per week: six evening shows and two matinees. Generally performances begin at 7pm, with performers required to be at work at least an hour or two before curtain-up. Typically performers will finish work between 9pm and 10.30pm. Stage managers start work before performers arrive, several hours before the performance, and may at times work through to the early hours of the morning. On a day with a matinee, workers will arrive around 1pm and have a one-hour break before the evening show. While Sundays have traditionally been a day off, productions are increasingly requiring performances on Sundays, often with no extra payment to reflect the unsociable hours.

Risks of overwork and burnout are magnified by the precarity associated with the industry-wide reliance on short-term contracts, and the intense competition for work. Performers and stage managers are discouraged from taking adequate leave or leaving breaks between work because they cannot be sure when the next work opportunity will come along. This can lead to a number of consecutive engagements during which they take very little time off work. Unsociable working hours and patterns have a particular impact on parents and carers. Evening and weekend work present obvious challenges for parents to manage childcare and requires significant sacrifices in terms of family time. To add to the financial pressures, childcare at unsociable hours is generally much more expensive. It is incredibly difficult to sustain a career in the performing arts as a parent, especially without a non-working parent or family support.

3 Pay and working conditions

Theatre

Pay and working conditions vary greatly across different types of work. Equity has longstanding collective agreements covering West End, subsidised and commercial theatre, which set minimum rates of pay and set down various other employment rights for our members. Our West End Agreement represents the best minimum rates of pay which Equity has negotiated. We have secured above-inflation pay increases year-on-year, with the latest deal securing a 17% pay increase in the three years to 2026, including a 5% increase in the last financial year. In subsidised theatre (including, for example, the National Theatre and other publicly funded

venues) we have secured at least a 12.5% increase on minimum rates over the three years to April 2026.

The spiralling cost of housing, food, energy and other essentials is well documented. These pressures add particular challenges for our members to pursue a career in an industry in which high barriers to entry, low pay and insecurity of income are the norm, not least those without personal wealth to assist them. Even in sections of the industry which are among the best-paid, such as the West End, our members still tell us that they struggle greatly with the cost of living in London.

Data we collected with the University of Warwick in 2023 showed that average earnings among our membership from industry work is £15,270 per year.⁹ The implication is that the vast majority of our members supplement performance work with other work, such as in hospitality, teaching or courier work. We know that a degree of flexibility in how they undertake this supplementary work is important so that they can take up performance opportunities when they arise and potentially at short notice. However, this does not require the use of zero-hours contracts, which provide one-sided flexibility to the employer at the expense of the worker. In common with the TUC and its other affiliates, Equity supports the banning of zero-hours contracts and their replacement with contracts that guarantee workers a minimum level of security of income. This is particularly important for our members who face insecurity in performing arts work, whether the length of engagement is typically weeks or months. We urge the Mayor and London Assembly to continue to make the case to the government that there must be a full and robust ban of zero-hours contracts.

Drag and variety artists

Insecurity is particularly acute for drag artist and variety performers, who generally work gig to gig for a fee agreed on the night, often not discussed prior to the performance. Rarely will they be given a written contract detailing particulars of their work and their rights. Often performers are not provided with dressing room facilities adequate to protect their dignity and privacy. It is not uncommon for performers not to be paid at all for their work, perhaps on the prospect of paid work in the future. Our members are often told that they are involved in a collaborative artistic endeavour, done for the love of the art. However, their art is still work and performers are entitled to be paid fairly by engagers for their work, which audiences are paying a venue or producer to see.

4 Impact of the pandemic

The pandemic had a devastating impact on creative workers. The majority of Equity's members had all or most of their work cancelled due to Covid-19 restrictions. We welcomed the government's support schemes, the Cultural Recovery Fund (CRF) and other grants made available via funding bodies. However, the CRF was designed to support organisations and not individual workers. While this money helped to sustain venues through the lockdowns, it did very little to put money in the pockets of performing arts workers, many of whom were forced to find alternative careers. The support scheme which was targeted at self-employed workers such as our members, the Self-Employment Income Support Scheme (SEISS), had significant flaws, resulting in the exclusion of 40% of Equity members from it.

The pandemic also compounded the arts' historical problem of elitism by disproportionately impacting under-represented groups, especially those from working class backgrounds. According to ONS labour market data, there was a 44% drop in BAME female workers in the arts sector between the third quarters of 2019 and 2020.¹¹ Meanwhile, Ofcom identified diminishing levels of diversity more broadly in the broadcasting sector. DCMS Sectors Economic Estimates 2021 revealed an exodus of young people leaving the profession. Between December 2019 and June 2021, the number of 16-24 year olds working in the cultural sector fell by 12% and the number of 16-24 year olds working in music, performing and visual arts fell by 17%.

Following the pandemic, government support continues to flow in large sums to the employers of the sector but much less to the workforce. The Theatre Tax Relief scheme currently offers theatre producers a 45% rate of relief for corporation tax on eligible costs, which cost the government a record £178m in the 2022-23 financial year.¹² While this is welcome support for venues struggling with spiralling costs of operation, which our members rely on for work, direct support to performers is paltry in comparison. The Mayor and the government should consider, then, how support can be given more directly to workers, so that the performing arts does not become the exclusive preserve of the wealthy.

Federation of Small Businesses Ref No. 003

INTRODUCTION

The Federation of Small Businesses (FSB) is the UK's leading business

organisation. It exists to protect and promote the interests of the selfemployed and all those who run their own business. FSB is non-party political and is also the largest organisation representing small and medium sized businesses in the UK.

London's small business community is the largest business cohort as they make up over 99% of all London businesses. They are the businesses that will create the jobs and growth for the future.

FSB RESPONSE

1. To what extent has London's night-time leisure sector recovered from the pandemic?

It is clear hospitality continues to struggle after the pandemic with both rising costs and tighter purse strings, along with challenges in finding a sufficient labour force. The recovery has been slow and distant affected by the move to a work from home culture, a shift in behavioural patterns and general economic conditions. The most recent FSB Small Business Index (Quarter 2) 57 per cent of London businesses said 'General economic conditions' was the greatest perceived barrier to growth over the coming year.

There was a boost in confidence in 2022 due to reopening following Covid closures, but anecdotally from the live music perspective, things have been stagnant, and in some cases, regressed. The fees charged for musicians and other entertainers have been static or decreased, resulting in it becoming uneconomical to play in London – this has been magnified by other cost increases, including parking costs and the changes to the Ultra Low Emission Zone.

2. What are the most significant challenges confronting London's night-time leisure sector currently?

Crimes against business, employees and customers is the biggest issue impacting small firms in the night-time economy. A lack of criminal enforcement plays a huge impact on the work force as well as creates challenges with anti-social customers and criminals who realise that they are unchallenged in their actions and that their actions are without consequence.

There are also concerns about personal safety. This includes drink spiking, lack of visible policing on London streets (especially relevant to lone females), gangs operating visibly by tube stations.

FSB is calling for:

- A dedicated Business Crime Strategy and portal for full reporting. It would demonstrate commitments to targeting business crime from the beginning to the end of the Mayoral term.
- Reporting annually of progress on its action plan, and, setting up a dedicated business crime portal where businesses can report any instances of criminality affecting their business.
- The Introduction of a London wide campaign to raise awareness and importance of reporting all types of business crime and make signposting clear so businesses know where to report the various

business crime types.

Some Good Guidance that we recommend:

- Embarking on a targeted communications campaign to ‘report it’, to help counter the premise that business crime doesn’t matter.
- Ensuring all businesses that report a crime, whether by phone or online log, get a police response in a timely fashion – like any other victim of crime would expect.
- Setting up a dedicated retail crime unit to tackle store theft and incidents of violence against staff as per the SPoC (single point of contact) guidelines.
- Ensure Grow London Local clearly signposts to supportive measures to protect against business crime, and, highlights the availability of free cyber security training / where to find courses.
- Make Cyber Aware Accreditation accessible to all micro and small businesses.

Furthermore, London’s night economy is not socially accessible to many people on low incomes, due to the high costs. Many people will struggle to pay for the wonderful cultural experience of a night out in London. The food and drink options and activities such as attending the theatre have been curtailed for many. Inflation has meant that prices have spiralled making it extremely expensive to have a night out in the centre of London.

FSB is calling for a reduction in public transport costs to support recruitment of low paid staff and low income self-employed in London. Over threequarters (77 per cent) of small businesses¹ surveyed said that subsidised public transport would significantly help low paid workers and low-income self-employed people in London and assist in recruitment too

3. To what extent is London a good place to operate in as a nighttime economy business?

This varies from sector to sector. In the live music sector, it is extremely difficult. Staff are difficult to attract, parking charges, plus concerns with drop offs and deliveries can make it logistically difficult for many firms in the night-time economy. Many venues also have challenges around neighbours and licensing, usually from newly arrived neighbours. Many venues will have a certain amount of noise within legal limits but there can be a significant number of noise complaints, particularly considering the huge increase in new developments that have sprung up, after venues have already been established. The onus needs to be on the residents to be understanding, who move in knowingly of noise levels, and 1 FSB Mayoral Manifesto survey – conducted between 1st Jan-31st Jan 2024 not on the venue, that has always existed. This will help support long established nighttime venues.

Musicians typically have to move heavy equipment by private vehicle (public transport is not an option), only to find limited parking or loading facilities anywhere nearby.

Wellbeing support

Mental wellbeing and emotional wellbeing should be addressed as separate and distinct topics in terms of providing the right type of ‘wellbeing support’ to London based small businesses as they require different approaches and

preventative measures.

FSB London recommends:

- Raising awareness of the health and wellbeing support for small businesses across London via the Grow London Local Hub.
- Promote a ‘business healthy’ community by providing a dedicated service via Grow London Local and Thrive LDN which brings together service providers in this sector to ignite a positive change in the health and wellbeing of workplaces from 0-249 employees.

4. What are the needs of London’s night-time leisure workforce and to what extent are they currently being met?

ULEZ policies have had a negative impact on musicians and hospitality staff in general. Many have left the industry as they cannot afford to upgrade non-ULEZ compliant vehicles. Furthermore, the lack of parking and unloading facilities by venues make some almost inaccessible. In some areas of London, night workers returning by public transport, especially female staff, do not feel safe. Public transport has improved, but there are areas where provision is still insufficient.

5. Are there any groups of people which are likely to feel excluded from London’s night-time economy? If so, which groups are they and why?

We heard from one of our members in the Music industry:

“London is one of the most inclusive cities in relation to LGBT+, however the lack of visible policing in some areas will make vulnerable LGBT+ people feel unsafe. There have been reports in press of homophobic attacks, which will deter more vulnerable people from travelling in some areas.”

“There is almost no provision for disabled people in wheelchairs at many venues. It is often clear that venues have not consulted people in wheelchairs before designing facilities”

FSB data shows that 51 per cent of small business employers have employed someone with a disability or health condition in the last 3 years. It is vitally important that employees with disabilities are given equal access to support the night-time economy.

FSB is urging government to help make workplaces better for disabled employees, including through new Line Management Bootcamps so frontline managers are better able to support disabled staff and deliver flexible working.

For venues it is also important that they receive better understanding on what reasonable adjustments there are to support them. FSB has provided advice to small businesses.

6. What impact have the actions of the Mayor and Night Czar had in supporting London’s night-time economy?

FSB cycling members have said that credit must be given to improving cycle links and schemes. Nighttime transportation is essential for both workers

and customers.

However, the major policy of the London Mayor to affect the nighttime economy has been ULEZ, which has been detrimental to many in London. Many local parking and Low Traffic Neighbourhood policies across London have been at odds with operating nighttime venues.

From an engagement perspective, the Night Czar has actively engaged with FSB members and, particularly during Covid, was an active champion for those within the industry from a lobbying perspective.

7. What further action could the Mayor and Night Czar take to support London's night-time economy?

More pressure could be put at central government level to enable greater openness to talent from around the world. Reducing the cost of the immigration system and piloting specific visas will help small employers to meet specific staff needs and grow their businesses. FSB would like to see a cap on the overall visa and related costs per member of staff at £1,000 for small and micro businesses.

Grow London Local needs to also become the 'one stop shop' for skills. The London business support hub (Grow London Local) must be fully functional and easy to navigate to enable small businesses to attract the night-time skills needed. Helping small businesses with functional, digital, green, customer service skills, alongside leadership and management skills, for aspiring sole traders and micro business owners will boost the London night-time economy.

With the retail, leisure and hospitality sectors in particular relying on greater levels of apprenticeships. The reintroduction of the London Apprenticeship Grant for small employers would be an excellent measure. 80 percent of London small businesses said that they would utilise the offer of support to recruit and train staff if it was accompanied by a financial support scheme⁴. FSB calls for the reintroduction of a £3,000 apprenticeship incentive in London for under 25s.

More should be done to support businesses, by working with local authorities, who require their clients to have access to loading bays and permits. This will allow people to bring equipment in and out of London far easier.

FSB call on a greater focus of tackling business crime by following our recommendations earlier in the submission. We must make people feel safer and enjoy the fruits of a thriving London.

GMB, Ref No. 004

GMB London's Call for Evidence response

London's night-time economy

September 2024

GMB Union represents workers across all levels of the night-time economy. This includes Londoners working in hospitality, security and as professional

drivers. In addition, GMB represents key workers working nights including NHS staff. We are responding to the call for evidence to report the key issues experienced by our members working in the night-time economy.

Cost of living

The cost of living continues to be a key issue for London's workers and is particularly acute for those in the night-time economy, where precarious and insecure work is common.

Precarious work – In addition to zero-hours contracts, which remain prevalent, our members are experiencing a race to the bottom with regards to their pay and conditions. Staff at all levels are increasingly being moved to 'tip-based' contracts that reduce their basic level of pay, which is to be made up with money earned through tips. This makes a worker's level of income more precarious and can have a wide impact on a person's life e.g. accessing financial products. In addition, this payment model also moves tip income away from the low paid workers on the frontline.

Where non-contracted hours are used for roles, notably with security staff, workers are not receiving adequate workplace benefits such as paid holiday and an appropriate pension.

Unspecified work – Across the sector staff are required to do additional work on top of their role and hours e.g. working after the conclusion of a shift to prepare a venue for the next day's trade. This additional work is commonly unpaid.

Discriminatory age bands – The National Living Wage for workers aged between 18-20 is set 25% lower than for their colleagues aged 21 and older, even though young workers are subject to the same cost of living pressures. This has been an active campaigning issue for GMB London's Young Workers and we support the Government's aim to remove these discriminatory bands as part of the upcoming Employment Bill.

Transport

The nature of London's night-time economy means that employees are often travelling across the city to get to work. This makes transport a key issue in ensuring the viability of jobs.

Public transport – The frequent and reliable running of public transport throughout the night, especially at weekends is vital for workers to effectively attend work shifts at different times.

Safety – The experience of our members supports the research from *London Travel Watch*, which found that 73% of Londoners feel travelling after 10pm is the least safe time to travel. It is essential that travel routes are frequent and well lit to protect workers from safety risks. This links in with the Mayor's strategy to eliminate violence against women and girls. Women represent two-thirds of night-time workers and raise that there is real danger when they use public transport and walk to and from their shifts.

Costs – The cost of transport continues to be a cost of living pressure for workers, and it is vital that it remains affordable for low paid staff so that working in the night-time economy is a viable option.

Wellbeing and safety

Verbal and physical abuse – Our members working in the night-time economy, especially in security and as professional drivers (taxis, private hire and food delivery) are more likely to face verbal and physical abuse than those working in the wider economy. This is driven by the solitary nature of the work, where perpetrators feel more able to issue physical and verbal abuse when there is nobody else around them, as well as the fact that many of their customers have been consuming alcohol.

Access to facilities – Delivery drivers, such as those working for Uber Eats and Deliveroo, perform a vital role in the night-time economy and ensure that income can be maximised by businesses when customers are unable or unwilling to visit their premises. These drivers often operate a significant distance from their home and therefore need access to facilities such as toilets and hand washing stations. Unfortunately, it is common for the businesses utilising their labour to prevent drivers from accessing these facilities on their premises when approached.

Health and safety – The health and safety across London's venues is a consistent issue raised by our members. This is exacerbated by the lack of Enforcement Officers. We feel more effective properly funded enforcement would reduce the risk to night-time workers as well as patrons.

Wider health impact – There has been a steady flow of studies over recent years that suggests long-term night working is extremely bad for your health with workers that regularly work in the night-time economy being at greater risk of cardiovascular disease, diabetes and depression.

Good work standard

We would like to see the Mayor’s Good Work Standard expanded to cover more businesses working in the night-time economy in London.

Further investigation

We would like further investigation to be conducted to determine the current conditions working in the night-time economy. This should include a survey of staff on their experiences as well as further evidence gathering sessions.

Heart of London Business Alliance Ref No. 005

Introduction

Heart of London Business Alliance (HOLBA) is a Business Improvement District (BID), representing over 500 businesses in the West End of London. We help to protect and promote the commercial and cultural wellbeing of London’s West End through destination marketing, delivery of frontline services such as enhanced cleaning and security, business support and advocacy.

The Heart of London (HOL) area which includes Piccadilly Circus and Piccadilly, Leicester Square, Haymarket, Jermyn Street and St Martin’s is worth over £10 billion to the UK economy¹ of which 20% comes from the evening and night-time economy; and 50% of that, is driven by the cultural sector.² The area spans 39 hectares, just 6% of the wider West End footprint and yet it delivers 7% of its evening and night-time GVA.³

Currently there are over 160,000 people employed in night-time economic industries in the West End, making up over a quarter of all West End jobs.⁴ The Heart of London area is home to a powerful concentration of these activities, hosting 12% of ENTE related floorspace, whilst covering only 6% of the wider West End geographical area.⁵ In the Heart of London area alone, over 11,000 people are employed in night time economy industries, making up 25% of jobs in the area.⁶

The West End remains by far London’s busiest night-time destination (GLA, 2024) attracting over 150 million visitors every year⁷. Its concentration of night-time and cultural venues and businesses is a key contributor to London’s character, economy and global reputation for night-time culture. But its evening and night-time economy is underperforming – in 2022, growth line trends dictated that it should be worth £15.5 billion, instead of the current £14 billion.⁸ This was a key reason behind HOLBA launching the first evening and night time

¹ Annual Economic Real Estate Report 2023 – 2024, Heart of London Business Alliance

² Evening and Night time Vision, Strategy and Action Plan, Publica, 2023

³ ibid

⁴ ibid

⁵ ibid

⁶ ibid

⁷ Annual Economic Real Estate Report 2023 – 2024, Heart of London Business Alliance

⁸ Evening and Night time Vision, Strategy and Action Plan, Publica, 2023

economy strategy for the West End in April 2023 which outlined the key challenges such as high living costs, supply chain disruption, high operating costs, staff shortages, overcrowding on the streets, limited step-free access to the tube, increasing antisocial behaviour, footfall stagnation, lack of facilities and amenities and a disconnect between public policies and decision making at statutory level.

To what extent has London’s night time leisure sector recovered from the pandemic?

The West End has been fairly resilient to the impact of the pandemic, both at a wider West End and at a Heart of London area-level. While GVA dipped 6.7% and 6.9%, respectively, for the two areas between 2019 and 2020, their real value has recovered to 99.7% and 99.4% of pre-pandemic levels. However, in 2022, it was still below the pre-pandemic forecast trend line growth.⁹

Cultural venues, particularly theatres, cinemas and live shows in the evening and night-time are critical drivers for the wider business ecosystem and evening and night-time customer dwell-time and spend are higher where entertainment venues are located near complementary businesses which are open before and after performances. Our research shows that the variety of things to do, and the mixed and diverse people this attracts, is the best thing about working in the area. These factors create a unique atmosphere that is highly-valued by workers and visitors.

However, the expansion of work-from-home policies due to the pandemic has impacted businesses such as entertainment and food and beverage operators catering to office workers in the West End. Nearly half of all jobs in the area are professional private sector jobs, which has experienced the greatest increase with working from home.

What are the most significant challenges confronting London’s night-time leisure sector currently?

The most significant challenges confronting London’s night-time leisure economy are as follows:

- Night-time staff can feel priced out of the West End due to the affordability of public transport and the price of goods in retail and hospitality. This can be a barrier to attracting and retaining staff to work in the area.
- The rise of working from home to over 50% of HOL area office workers for part of the week has impacted the size of the near market for after-work activity.
- The frequency, reliability and safety of night buses is crucial to night workers.
- Crowding at bus stops and on night buses, and insufficient staffing or police presence, means that night transport can be a hub for anti-social behaviour, and both

⁹ ibid pg, 1

workers and visitors becoming victims of crime, undermines the visitor experience and their willingness to return to the West End.

- Prior to the development of our strategy, there was an absence of a dedicated strategy (including a 24 hour strategy) for the Heart of London area, which has resulted in an uncoordinated approach for the area including services, planning, licensing, lighting and digital screens, safety and sustainability measures. HOLBA welcomes the development of Westminster’s night-time strategy and has collaboratively supported its development.
- In 2023, 98% of hospitality businesses saw food and drink costs increase, 96% saw wage costs increase and 85% saw their energy costs increase.¹⁰
- Our research shows that antisocial behaviour is one of the worst aspects of the West End at night. Day workers cited safety, crime, violence, rowdiness, street urination, drunkenness, harassment and perceptions of lack of safety among the worst things about the HOL area after dark.
- Concentration of uses overlap day, evening and night-time, creating competition for the HOL area’s limited space, which also increases additional pressure on transport services and the public realm, with footways, and sometimes carriageways, full of pedestrians.
- After dark, many of the large buildings and side streets in the West End negatively impact on the character and atmosphere of the public realm. They lack architectural lighting, active frontages, and upper floor activity which can decrease the perception of safety
- A challenging licensing environment has resulted in the fragmented distribution of ENTE venues. This impacts on the vitality of the area as a whole.
- The number and variety of places to go to after a theatre show or cultural activity is limited in its diversity of offer and does not meet the demands of the broad range of visitors to the area. As people travel out of the area, the opportunity for additional spend is lost. This is due in part to the area’s Cumulative Impact Assessment which restricts the ability of new venues to open later in the evening or night-time.
- The ENTE is often considered as negative because its definition focuses on licenced premises which leads to management and regulation, rather than an opportunity outlook.
- Night workers want to see increased and visible security or police presence after they finish their shifts

¹⁰ Members Survey, UK Hospitality, BBPA, BII & HU, 15.01.2024 to 01.02.24

Are there any groups of people which are likely to feel excluded from London's night-time economy? If so, which groups are they and why?

There is physical access at the tube stations servicing the West End, but this is limited by step free tubes and a lack of night tubes. The lack of step-free access impacts people with mobility impairments at all times, it also challenges anyone travelling with luggage or children in buggies. The only step-free station in the area is Green Park, far from the nightlife cluster, with Tottenham Court Road to the east.

Pedestrian travel is heavily impacted by traffic, particularly around Leicester Square, Piccadilly Circus, Coventry Street, Charing Cross Road and Shaftesbury Avenue. In our research, excessive street traffic was noted as the third biggest issue for the evening and night time economy by day workers, with numerous respondents giving this as a reason they do not stay in the area after work.¹¹

There is a lack of a diversity of offer after 9pm. Key spaces and routes need to be redesigned so they are family-friendly and safer for all users, introducing informal play opportunities as part of the design of schemes. Empty commercial units could be used to test the potential of experiential games, e-sports cafes and play led uses in order to attract new audiences such as local workers and families in the late evening and night.

What impact have the actions of the Mayor and Night Czar had in supporting London's night-time economy?

The GLA have been supportive to both HOLBA and WCC with the development of evening and night-time strategies following on from the launch of its own evening and night-time guidance for boroughs. Night-time footfall indices show however that London is experiencing a slower recovery compared to other major urban centres in the UK.¹²

The High Street Data Partnership has had a positive influence on the understanding of London 24 hour economy and where possible should be expanded.

What further action could the Mayor and Night Czar take to support London's night-time economy?

We are calling for the Heart of London area to have a Special Area Designation:

- The Heart of London Area is a key contributor to the West End's economy at night, and its public spaces are world-famous symbols of night-time activity – Leicester Square and the surrounding area welcomes hundreds of thousands of visitors per week. A quarter of jobs in the Heart of London are in night-time industries and it hosts 12% of night-time economy related floorspace while covering only 6% of the

¹¹ Evening and Night time Vision, Strategy and Action Plan, Publica, 2023

¹² *ibid*

wider West End area. All of this means that the HOLBA area has an economic and cultural significance way beyond its size, which brings specific challenges and opportunities.

- A designation would signal a major shift in the way the area is planned and managed to support and protect night-time infrastructure, venues and businesses that contribute to its economic, social and cultural vitality. Sydney is a good example as it promotes special entertainment precincts and allows later trading for businesses that host live music. Montreal is piloting 24 hour night-time districts to support the visitor economy.

We also want to see:

- A CCTV system installed for the West End, with a control room to monitor and respond to incidents, the capability to speak to people on the street and an enhanced street lighting programme would help to reduce crime and the fear of crime.
- The creation of a new West End Crime Reduction Taskforce which would focus on developing a comprehensive Crime Reduction Strategy for the West End. Membership of the Taskforce would include HOLBA and the New West End Company and senior key stakeholders from the GLA, Metropolitan Police Service, Transport for London and Westminster City Council. By establishing a shared understanding of the crime problem and the necessity for collaborative action, the Taskforce will lay the groundwork for developing and implementing targeted crime reduction strategies. We do not believe that police resourcing and visibility is adequate for the West End, an area which has significant pressure from the millions of visitors that come here every year.
- Diversifying the offer in the West End would attract new and more diverse audiences, this could include outdoor film screenings, activities in green spaces, food and craft markets, street performances and a more diverse range of businesses operating in the evening and night-time economy.
- Activating side streets and small spaces would provide an intimate and attractive alternative to larger night-time venues.
- There is a need to look at the entire economy holistically including all sectors, workers, visitors and residents, across the 24 hour period, ensuring the area has the right infrastructure and provision that removes economic and social barriers and instead allows the area to operate to its full potential.
- Suitable relaxation of licensing regulations and provision of a positive planning policy framework in a considered and curated way would allow the economy to grow, creating jobs and increasing tax receipts.

- Expanding public transport provision would ensure the ENTE can access both the workforce and visitors it needs to succeed.

Music Venue Trust, Ref No. 006

Subheading

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1. To what extent has London's night-time leisure sector recovered from the pandemic?

We believe that grassroots music venues (GMVs) have made huge strides in recovering from the pandemic in terms of audience numbers and the appetite to go out. There are many ongoing issues, however, that may be linked to the pandemic that are actually expressions of underlying long-term challenges that must be resolved. We are concerned that a focus on recovery from the pandemic suggests these challenges are short-term and will go away with more time to recover, which is sadly not the case.

Attendance at venues is up but the amount of money isn't, and there are many current planning issues which may threaten venues in 3-5 years' time. Despite the public demand for grassroots live music, with 23 million audience visits to a gig last year, the average profit margin for a GMV is 0.5%. It is also worth noting that consumer trends and behaviour has changed; people aren't spending as much, especially on alcohol. Generational change is taking place, with young people not drinking as much, and trying to save money due to the cost of living. Venues therefore are also losing out on alcohol sales, which can often offset their loss-making on putting on new and original music. UK-wide, 55% of the logged issues in our Emergency Response Service are due to challenges around financial viability. This is due to a number of challenges that certainly include cost of living but go far beyond. They include (and we have gone into more detail on the question below):

Rising rents

- Business rate costs
- VAT
- Insecurity and instability from noise complaints and developments, so often that is agent of change not being applied correctly, as in National Planning Policy Framework (NPPF) guidance
- The fact that GMVs invest over £248 million every year into the development of new British talent, supporting both frontline performing artists and production and technical/logistics crew. With a total gross turnover of £501 million, including £131 million in ticket sales, representing the need to subsidise live music at grassroots level to the tune of over £114 million a year. Ultimately, venues are closing because the costs of presenting new and original live music vastly outweigh the possible income that can be derived from doing it.

Without resolving those long-term challenges we have a long-term economic model that isn't sustainable, regardless of how well venues have recovered from the pandemic. These challenges continue to threaten them with closures.

2. What are the most significant challenges confronting London's night-time leisure sector

currently?

We have outlined below the most significant challenges facing grassroots music venues (GMVs) in London.

Licensing:

There is an inconsistent licensing approach taken across London. Getting correct licensing can still be incredibly expensive for GMVs, especially for those that require additional advice or resources to ensure they have the correct licence, or need a minor variation.

Even within some councils - as well as between them - we see a lack of consistency from different departments. For example, one borough developed a great initiative post-Covid to get locals to visit GMVs through discounted tickets, with venues underwritten to provide this. While one part of the council channelled much-needed money to this initiative, another part of the council denies the GMVs temporary events notices to hold these events. Such inconsistencies, and indeed denied licences, can cost venues financially as well as valuable time.

The applications venues make for minor variations - such as temporary events licences or for extra hours - are not always understood as positive and important for the venue. The hours of midnight onwards generally make up for the loss making hours of 7-11. So while this extended opening may look like it's supporting alcohol-driven sales, it's often the difference between a venue's financial viability and its closure. GMVs generally also provide models for encouraging a healthier, managed drinking culture. A lot of venues - through the public nature of their events - are already adhering to safety concerns like security. They have that best practice baked-in so licensing is useful when licensing works to understand that they might be late-night establishments but they're safe. We therefore think greater recognition of why venues are applying for additional hours / temporary event notices would be useful in alleviating some of the financial challenges venues face.

Planning:

There are two problems within planning which are the agent of change principle, and the statutory right of consultation. We appreciate that both may be outside the GLA's authority but we believe the GLA may be able to campaign effectively for these issues to be addressed.

The adoption of the Agent of Change policy in the National Planning Policy Framework (NPPF) and the use of Section 106 agreements between local councils and developers have been vital tools to protect GMVs from threats from redevelopment. The Agent of Change principle states that the responsibility for mitigation of the impact of a planning application falls to the 'Agent of Change' and not to existing businesses to modify their practices. This includes ensuring adequate sound-proofing for new residential developments that are near to existing GMVs.

Section 106 agreements are also a pragmatic tool that have allowed councils and developers to come to a negotiated agreement and abide by planning consents. The use of these two tools have protected GMVs and allowed them to continue to function in areas where there has been rapid redevelopment. On the ground, however, there is often a lack of understanding about how Agent of Change works in practice as well as inconsistency in whether and how it is enforced, which has a detrimental impact on the grassroots music venues involved.

We would like to see the Agent of Change principle made statutory so it is no longer just guidance that developers can seek to get around. We feel this would not just prevent venues from facing noise complaints and being threatened with closure, but would also provide higher-quality accommodation for residents when they live near a cultural centre.

GMVs also do not have the statutory right of consultation, unlike for theatres. This means that GMVs - and advising organisations such as Music Venue Trust - have to come in late to the planning process and alert the council that a GMV is impacted. This can result in further delays to the planning process, which we do not support,

The Windmill (Brixton) is a great example of issues with planning that GMVs face. Developers of a space opposite The Windmill used Google Maps in their planning documents, with The Windmill identified with a pop-up icon to indicate it as a performing arts space, and clearly noting it as The Brixton Windmill. In the rest of the developers' plans, The Windmill isn't mentioned anywhere, despite the fact that it sits directly opposite their new site. MVT had to inform the venue, who were not informed, and the council had to be informed retrospectively. This has led to further delays, and we are concerned that both residents and the venue will be negatively impacted once the site has been built. If GMVs had to be consulted, as theatres do, this would have enabled the venue to be involved in the process from the start and to work with the council and developers to ensure the venue could continue providing cultural enrichment to the community, while residents could expect high-quality soundproofing on their accommodation.

Business Rates:

GMVs in London continue to face high business rates. The current business rates process for GMVs is inequitable and ineffective for what it is designed to do. It lacks fairness and efficiency, demonstrated by an administrative process that is complex in calculation and inconsistent. Business rates present an obstacle to the opening of new venues, and an excessive pre-profit taxation on existing venues. A sustained rise in business rates has taken place in the last decade and has had a detrimental impact on Grassroots Music Venues in the UK. UK GMVs have the highest premises taxes in Europe, reducing the sector's potential to support new and emerging talent. The existing business rates system is ineffective, inequitable and highly sporadic. Rates in the GMV sector vary wildly from location to location, for example. These issues are exacerbated by two different calculation methods; GMVs who have their business rates calculated by fair maintainable trade have, on average, a rateable value that is 18% higher than venues who have their rateable value calculated by square meterage. GMVs are placed, without explanation, into broad definitions of premises. This method fails to recognise GMVs as a distinct category with specific characteristics which are unique to the sector. The result is that

GMVs across the country are paying disparate rates that demonstrate no logical relationship between the amount charged in business rates and the business operating from that premise. We would recommend creating a specific premises definition for GMVs and removing properties satisfying that definition from the requirement to pay business rates.

To give another example of the aforementioned inconsistencies and how it affects business rates is the approach to whether GMVs who are registered as not for profit should be supported through local discretionary grants for business rates. Some community interest companies are given discretionary rate relief and some aren't across London. It isn't that one council is consistently doing it right and another doing it wrong, the inconsistency is happening within the same council, creating confusion for GMVs and negatively affecting them financially.

VAT:

The UK has the highest level of taxation on cultural tickets of any comparable country in the world, and the highest rate in Europe.³ Past governments did not make use of cultural exemptions from VAT available to it while a member of the EU, and the Government has not acted post-Brexit to take advantage of the opportunity to set appropriate national taxation policy for the sector to make the UK more competitive. Substantive available finances leave the creative economy immediately in the form of VAT on ticketing.

Live music is a not-for-profit activity within the grassroots sector but is an activity that generates huge longtail returns for the Government. Currently, 16.6% of the value of every

ticket sold at a GMV event is lost to VAT. Based on 2023 data GMVs sold tickets for a total value of £131 million, with a total potential VAT liability of £21.7 million. GMVs invested £248 million in the delivery of live music events, generating total reclaimable VAT of only £19.8 million. The 20% VAT rate therefore creates only £4.66 million of benefit to the UK Treasury but is an excessive administrative burden on the grassroots sector itself. VAT on GMV tickets is a direct taxation on R&D, removing £4.66 million from the sector that is a potential investment into new and emerging talent. This is an opportunity to create a smart and streamlined tax regime that bolsters investment into the UK's live music industry while cutting red tape. The CMS Committee recommended that "The Government should introduce a temporary cut to VAT, based on venue capacity, to stimulate grassroots music activity and the wider economic benefits to local areas that grassroots music shows provide. (Paragraph 59)." For the long-term, the Committee suggested that "the Treasury and DCMS undertake a comprehensive economic analysis of the impact on a cut to VAT in line with recommendations made in this report, including modelling: a cut to a 10% rate, which is the European average, on tickets, as well as alternative approaches such as VAT on food and beverages; a targeted intervention for different sizes of venue; and the indirect impacts to VAT revenues of venue closures and a reduction in live and electronic music events.

The UK live industry is enjoying a period of extraordinary success. These successful events are built on the work of the grassroots sector, artists, venues and promoters⁶ that are not able to sustain their activity and ensure that the sector continues to produce UK talent in the future but they do not currently financially contribute to the cost of delivering it as they do elsewhere in the world⁷. We recommend that VAT on cultural ticketing in GMVs is reduced to 0% while VAT on cultural ticketing in the wider live music industry is reduced to the European average (5-7%) provided that it is allied to an agreed comparable financial investment programme that supports the grassroots of the industry.

What are the needs of London's night-time leisure workforce and to what extent are they currently being met?

Grassroots Music Venue operators and their staff need to be able to get home safely and easily in order to continue working in the night-time economy.

Music Venue Trust does not have current survey data to track London's GMV sector workforce needs and satisfaction levels, but we have supported the work of London Boroughs who are driving positive initiatives to consult with and meet the needs of their night-time economy workforce. Most recently with London Borough of Camden and their campaign to raise awareness of violence against women and girls, 'in Camden we call it out'. We have not run specific surveys in order to offer analysis, but some GMVs in Central London have fed back a fear that the sense that crime such as muggings and phone theft is becoming increasingly commonplace is knocking consumer confidence and affecting trade.

4. To what extent is London a good place to operate in as a night time economy business?

There's a big improvement in how much GMVS, and the challenges they face, are understood and in particular licensing is in a much better place than it was ten years ago. We have already mentioned the inconsistent approach both across and within boroughs, which can cause GMVs confusion and inadvertently creates competition between them. We also see many instances where personnel from the same borough who are on the ground and interact with businesses - such as environmental health officers - have a completely different attitude to their colleagues. Two environmental health offices in the same role, working in the same borough, interacting with the same venues, may take an

entirely different - and often contradictory - tone and approach to GMVs. This breeds mistrust, misunderstanding, and poor relations between GMVs and council officers, which makes solving challenges such as noise complaints and planning issues even more difficult. On the other hand, we experience fantastic, dedicated councillors and officers who are doing amazing work. Islington, for example, is working brilliantly; their team who handle licensing are exceptional and we work with them frequently to get advice on other parts of London. Similarly, our capacity to deliver impactful support in the borough of Hackney has significantly increased since the GLA's Business Friendly Licensing initiative was funded and launched. LB Hackney's business-focussed approach and piloting of the 'Hackney Nights' portal has had very rapid, positive effects.

5. Are there any groups of people which are likely to feel excluded from London's night-time economy? If so, which groups are they and why?

We think there are a few key groups which could be affected by the two issues of physical access and late-night transport. The groups could therefore include people with access requirements, people reliant on late-night public transport, women and vulnerable groups who may not feel safe on late-night transport, and those with non-visible disabilities. We have detailed more on these groups and solutions in the next question.

6. To what extent is London's night-time leisure sector inclusive and accessible for all Londoners?

We always think more could be done to make London's night-time leisure sector more inclusive and accessible; in particular, we would focus on two points here: physical access, and late-night transport.

Physical access:

Many GMVs in London are in buildings with multiple sets of steps, sub-pavement level rooms, or older buildings that are difficult to upgrade and renovate. From our work with GMVs, however, we know that many are keen to make their venues as accessible as possible and many invest precious financial resources and funding that they receive into ramps, lifts, and accessible toilets. We believe more could be done - either through grants, or other forms of assistance - to help GMVs continue to improve their accessibility and increase their potential to be inclusive spaces for all Londoners to enjoy live music.

Late-night transport:

While London has made strides in improving late-night transport through the night tube and night buses, we believe that its reliability, cost, and safety measures can still be improved to encourage night-time economy workers, women, and students to continue to feel safe in the night-time economy. Ensuring that bus stops are well lit, trains and buses are frequent and reliable late at night, that they serve residential-heavy areas where workers may be travelling back to, and that stops are frequent enough for people to feel they don't have to walk too far in the dark alone, are all measures we would like to see more of.

7. What impact have the actions of the Mayor and Night Czar had in supporting London's night-time economy?

MVT played a role in the report and recommendations that led to the appointment of the Night Czar initially, and we continue to feel that the appointment and role is a very positive one. We think the Mayor and the Night Czar play an important part in increasing the visibility and profile of GMVs within the night-time economy and, the Night Czar in particular, has also been very helpful in participating in mediation or brokering meetings for GMVs.

We think both the Mayor and the Night Czar have dedicated time influencing the right people and focussing on the right policies, as far as their role permits. To further this, we would be on the side of increasing the scope of the Night Czar's powers; this might include their ability to summon people to meetings, spending power, ability to influence where and how money is spent. As a concrete example, we would love to see the Night Czar able to lift transport restrictions so musicians can unload. We think some of the criticism for the Night Czar stems from issues that are not within their power to change. We think the Night Czar and the Mayor are taking as much direct action as they can. We would support a rethink of what the Night Czar role could achieve if the powers were broader as we think even more could be achieved through this position in partnership with the Mayor's office. In our experience, the Mayor, Night Czar, and particularly the Culture Community Spaces At Risk team, and the Cultural Team, are all keenly aware of the issues our sector faces, and are making a positive contribution.

8. What further action could the Mayor and Night Czar take?

We think there are several small changes, big win policies or interventions that could be taken that will create a sustainable future for grassroots music venues. We have mentioned some of these above already, but these are:

1. **Agent of change principles to be made statutory** in the NPPF but also for councils and local authorities to have a clear understanding of how to implement it early on in the planning process, to prevent delays and problems down the line, for both sides.

2. The creation of a specific **business rates** premises definition for GMVs and the removal of properties satisfying that definition from the requirement to pay business rates

3. A **reduction in VAT** on cultural ticketing in GMVs to 0% and reduce VAT on cultural ticketing in the live music industry to the European average (5-7%)

4. On a more national level, A **£1 grassroots investment contribution from every arena and stadium ticket sold** to support grassroots music venues, artists and promoters. The investment by GMVs far outstrips the return they make from ticket sales.

a. In 2023, grassroots music venues invested £248 million in presenting live music, supporting the careers of tens of thousands of musicians. They will generate £131 million in ticket income, representing the need to subsidise live music at grassroots level to the tune of £114 million a year.

b. Small and independent businesses have long struggled to carry the burden of subsidising this research and development activity on their own. With rising costs from rent, rates, energy bills and staffing, it simply isn't possible for us to expect they can continue to do so. It isn't because people aren't interested in music anymore. Despite the public demand for grassroots live music, with 23 million audience visits to a gig last year, the average profit margin for a GMV is 0.5%.

c. It has already been established that any levy can be simply absorbed into the price of a ticket, as has been done recently by Enter Shikari - their tickets including a £1 levy are actually cheaper than most arena tickets. There is no need for ticket prices to increase as a result of this levy, any more than they have in the past for any other levy/charge/fee imposed by the live music industry for its own benefit.

d. We believe that support from local, national, and regional governments would place significant pressure on arena owners and major promoters to take the lead for the rest of the industry by establishing a Grassroots Investor contribution; a small charge contained within every ticket that represents their investment into research and development R&D for their future.

5. A **more consistent, clearer approach to licensing** that is based on the assumption that all London boroughs think live music is a good thing for their communities, and that licensing decisions will be taken in this context.

a. There are reasons why licensing is locally responsive and the licensing regime that you might want to see in the middle of Hackney may not be appropriate in the suburbs of

Bromley. We would therefore like to see a uniformity of approach built around the basic concept that live music in our communities is inherently a good thing - these places give people access to culture, to safe spaces to be themselves, to experiment with art, to improve their health and mental health.

b. We do not think a blanket approach across London is realistic, and we think there's a reason for a local approach and a role for everyone to play. We'd like the approach to licensing to start from the London-wide agreement that live music is a good thing, that we're working to ensure its growth and survival, and then have a local overlay atop this.

6. More broadly, we'd like to see more opportunities from the top-down for local authorities to take on **pro-active projects and funded roles** that might not be able to happen just within a council budget. We were impressed by some councils' use of the GLA's business friendly licensing fund in 2022/23. In some boroughs this was used really well in a business-focussed, friendly, and innovative format. One council also created a dedicated cultural nighttime focus within their licensing and environmental health, weaving that in with best practice training, outreach to venues, and that fed into their nighttime strategy. We'd like to see more initiatives like this that councils may not be able to fund themselves.

Royal Albert Hall, Ref No. 007

Demand for concerts at the Royal Albert Hall is now outstripping pre-pandemic levels, but our cost base has also increased significantly, mainly owing to salary and energy price increases. The cost-of-living impact is predominantly seen in demand for some concerts that are of standard repertoire or return regularly to the venue (not 'special' events), and in late booking patterns. For example, Swan Lake in June 2024 ended up with record sales, but people booked much later than in previous years. We are seeing a lot more feedback from audiences asking for concerts to finish earlier, as the impact of public transport final services is keenly felt, especially by those who have travelled from outside London. Customers tell us they leave early in order not to miss final trains, and therefore they miss the climax of the concert, which causes distress.

As a Grade-I-listed Victorian building, accessibility for people with physical disabilities is very challenging, but we do what we can including accessible parking, step-free access, a wheelchair platform and free companion tickets for disabled people who require an assistant companion. We also offer assisted hearing facilities, wheelchairs, and caring for assistance dogs, as well as investing in research to discover how best to welcome neurodiverse people to concerts and live events. We also do relaxed performances specifically for autistic people, those with learning disabilities, those with dementia, or anyone who may prefer coming to our venue with additional measures in place. Many people with disabilities tell us that traveling to and from the venue can be the most difficult part of their concert-going experience. This is exacerbated by the journey from South Kensington tube, where, despite ongoing improvements, step-free access will still be lacking to and from the tunnel, which continues to be in a parlous state of disrepair

Royal Vauxhall Tavern, Ref No. 008

Subheading

1. To what extent has London's night-time leisure sector recovered from the pandemic?

London has struggled to recover from the pandemic as lockdown created a different style of awareness and people socialising in meeting people changed to dating apps. As a testament during the pandemic there was no leadership from the London Night Czar. Manchester's Sacha Lord became the UK spokesperson on all national media, fantastic presence on LinkedIn and other social media. This should have been driven by London's Night Czar and personally I don't think she has recovered from this.

2. What are the most significant challenges confronting London's night-time leisure sector currently?

As an example Vauxhall was a destination area before lockdown. Since restrictions were lifted the amount of anti-social behaviour in knife crime, robbery, theft and sexual assault is out of control. There is no police visibility at weekends, police do not respond to 999 calls.

Westminster, Southwick and Lambeth have the highest reported levels of knife crime in the UK and the focus to address this is not being met with a police presence on the streets. The safety factor is a major contributory factor in people feeling safe when they are out at night time and this is now being lost. Recent statistics and incidents of knife crime in London are well reported. The cost of living has had a major detrimental impact in the number of times people come out to see cabaret, club nights and to socialise. The proposed no smoking policy being currently covered in the media will be the end of people going out. If this policy is enforced the hospitality industry will collapse.

This year PPL PRS charges for this independent small business went from £11K a year to £40K a year, they are the most difficult company to deal with and are set to destroy the fabric of hospitality.

3. To what extent is London a good place to operate in as a night-time economy business?

London used to be the night life capital in the UK. Under the existing Night Czar, London has dropped to 7th position behind Edinburgh, Glasgow, Newcastle, Birmingham, Manchester and Bristol. This is hardly a credible position for the Night Czar, she does not visit areas and meet with business owners.

5. Are there any groups of people which are likely to feel excluded from London's night-time economy? If so, which groups are they and why?

The LGBT community are an easy target who most often do not report attacks either through fear or embarrassment. This has been raised in the police and local authority forums on a number of occasions.

6. What impact have the actions of the Mayor and Night Czar had in supporting London's night-time economy?

The Night Czar's Woman's Night Safety Charter has been a disastrous policy for LGBT venues where non LGBT women turn up on a Saturday night because they see LGBT venues as a safe space to be in. What this has created is LGBT people have stopped coming out on a Saturday night as they are no longer able to mix with friends and lasting friendships they have created over the many preceding years. This is very sad.

7. What further action could the Mayor and Night Czar take to support London's night-time economy?

Replace the current Night Czar. In the LGBT business forums she is seen as a weak appointment and has done little to create confidence. She has been a non-effective person and

done nothing to support or promote London as the leading night life city. Please prove me wrong and show me what she has done to merit retaining her role. London deserves better.

Society of London Theatre, Ref No. 009

Introduction

British theatre is an economic powerhouse. The sector generates a turnover of £4.4 billion per annum, contributes £2.39 billion in GVA, and supports 205,000 workers. For every £1 spent on a theatre ticket, an additional spend of £1.40 is generated in the local economy. It is vital to the UK's thriving creative industries and key to the soft power of Global Britain, driving inbound tourism, and exporting productions worldwide.

Theatres play an essential role in local communities, delivering transformative social good. In addition to providing entertainment and cultural enrichment, theatres strengthen our sense of community and belonging, cornerstones of the cultural placemaking agenda.

British theatre is also leading the way for a greener future, pioneering initiatives such as the Theatre Green Book that embeds sustainable practices within productions and organisations.

But the British theatre sector is at risk. Production costs continue to rise faster than inflation, with energy costs up 120% since 2019. Public investment in the arts has declined significantly in real terms over the past 14 years. Without serious investment in physical infrastructure in the next five years, nearly 40% of venues risk closure and 40% will become too unsafe to use.

We welcome this inquiry and look forward to working with the London Assembly to support London theatres to thrive.

2 Committee Questions

a. The scale and cause of the challenges facing late-night venues and their workforce in London

Skills Shortages & Gaps

The theatre industry is facing skills shortages and gaps in technical, operational and production teams, including front of house, lighting, sound, rigging, automation, costume, wigs, hair and make-up. SOLT & UK Theatre look forward to sharing the results of our skills shortages survey in October 2024.

Research from the Creative Industries Policy and Evidence Centre **indicates** that that 73% of those employed in creative occupations have a degree or higher-level qualification (compared with 44% across the UK workforce). However, degree-level qualifications are not required for many of highly skilled theatre roles which are currently in shortage so technical qualifications such as apprenticeships represent a sensible work-based route into the industry for young people and older workers looking to reskill.

Our members are proactively addressing skills shortages through initiatives such as the National Theatre's Skills Centre, the Southbank Centre's Technical Skills Academy and the Mackintosh Foundation's Technical Apprenticeship & Traineeship Programme.

Proposal: We invite the committee to meet with London theatre leaders finding solutions to the industry's skills shortages through apprenticeships and traineeships to unlock more opportunities for London's young people.

b. The strengths and weaknesses of London's night-time leisure sector, to what extent it has recovered from the pandemic, and how it has been affected by rising inflation and the cost-of-living.*Workforce*

Over 70% of the theatre and performing arts workforce is freelance and according to survey data collected by *Freelancers Make Theatre Work* (2020), organisations in the performing arts sector spend 39.4% of their annual turnover on freelancers.

Compared to the rest of the UK, London's West End has recovered well from the COVID-19 pandemic. However, the industry is still coping with the loss of skills during the pandemic – many people left the industry.

Unfortunately, many performers and musicians were left without financial support because they are not PAYE staff and therefore were not eligible for the UK government's furlough scheme. Many also did not qualify for the Self-Employment Income Support Scheme (SEISS).

Rising costs

The theatre industry is managing significant cost increases across all areas including set construction, building maintenance, staff costs, training budgets, and a 120% rise in utility bills. Despite these financial challenges, cost increases have not been passed on to audiences with average ticket prices only rising by half the rate inflation did since before the pandemic.

Local authority funding cuts

London theatres and performing arts venues house and nurture our theatre makers, including emerging artists and highly skilled technical teams. The concept of museums and galleries acting as curators and guardians of important cultural assets is well understood by policy makers, however theatres do not generally enjoy equal status in this regard which is reflected in the discrepancy between Arts Council funding available for maintenance projects for museums as compared with theatres.

Existing funding streams for theatre infrastructure projects are piecemeal rather than a strategic and long-term approach to solving the problem. In July 2024 the Campaign for the Arts (CFTA) published research which found that the UK has one of the lowest levels of government spending on culture among European nations, and was one of a small minority of countries to reduce total culture spending per person between 2010 and 2022.

c. The extent to which London's night-time leisure sector is inclusive and accessible for all Londoners

Most theatres and performing arts venues in London are not accessible and need investment to make adaptations. Research published by SOLT & UK Theatre demonstrates how investing in maintaining and developing theatre buildings helps to strengthen communities, provides job opportunities and boosts the UK's creative exports.

Transport

Access to public transport is a significant factor in theatres' ability to attract and maintain audiences, as well as being a key part of the venue's licensing terms, with proximity to the night tube and night buses often considered essential when applying for premises licences.

The areas that are close to or in the West End have the highest level of accessibility using public transportation. The availability of sufficient public transport enables theatre attendees to leave efficiently, limiting crowd congestion and potential nuisance.

Public Toilets

Many London theatres are historic buildings with limited ability to increase the number of toilets for audiences. Public toilets in London are therefore particularly important for members

of the public visiting the theatre. When TfL are planning new transport infrastructure, we call on policy makers to consider the needs of theatre audiences, including public toilets.

Programming

Our members are constantly diversifying their programming; Red Pitch at Soho Place was an example of a production featuring Global Ethnic Majority performers at the first new-build West End theatre in 50 years. Accessible venues such as Soho Place provide opportunities for our creative talent to shine; Amy Trigg won the Olivier Award for Best Actress in a Supporting Role in a Musical for her portrayal of Agnes in *The Little Big Things*.

Children and Young People

While costs are rising for theatre, the sector works hard to offer affordable tickets so that more people can experience the world-class theatre London's West End offers. SOLT & UK Theatre are proud to be able to run schemes like **Kids Week** to help children access world class theatre. It is one of the biggest, longest-running audience development initiatives in the world, engaging nearly 1.7 million children and families since it began in 1998.

In 2023 SOLT & UK Theatre launched the Theatre for Every Child Campaign because we believe that every child has the right to go to the theatre, to experience the joy and opportunity that it can bring. In order to sustain our world-class reputation for theatre, we need to invest in our future audiences and workforce by ensuring every child has the chance to go to the theatre by the time they leave secondary school. Once we achieve political support for this campaign, we will work in partnership with schools and theatres to ensure that our aim is delivered, especially in schools and communities where theatre trips are currently not possible.

d. The impact of existing Mayoral policies and initiatives aimed at supporting and invigorating London's night-time economy, and what progress the Mayor has made in achieving his vision of London becoming a "24-hour city".

SOLT & UK Theatre welcome the Mayor of London's Unpacking the Credits initiative to raise awareness of jobs in the creative industries amongst young people from diverse backgrounds. We would welcome the opportunity to contribute to this work to help publicise the wide range of off-stage career opportunities in the theatre industry.

SOLT & UK Theatre also welcome the Skills Bootcamp funding that has been made available for the creative industries and seek an opportunity to develop a theatre industry specific bootcamp drawing on the expertise of our London based members. A group of our members are trialling a portable apprenticeship model which enables apprentices to earn and learn through working with some of London's leading venues.

In 2021, support from the Mayor of London's Good Growth Fund contributed to the National Youth Theatre's (NYT) award-winning, low carbon renovation of its north London home, located in one of the most deprived neighbourhoods in England in Islington. Repurposing 90% of the existing building structure, the renovation created a new accessible entrance and reception; doubled the number of studio and workshop spaces for young people; and created a new Workshop Theatre onsite for the first time in NYT's 68-year history.

e. What actions the Mayor should now prioritise to support London's night-time economy?

We call on the Mayor of London to support the theatre industry to maintain and develop its venues. Vibrant, accessible theatres make London a great place to live and work. However, SOLT & UK Theatre venues, which span the Victoria era through to modern buildings, have a range of immediate and longer-term infrastructure challenges.

Research published by SOLT & UK Theatre in July 2024 demonstrates the urgent need for sustainable and systematic investment in theatre buildings across the UK and highlights how investment in theatre and performing arts venues supports:

- Skills development and job creation
- Placemaking and urban regeneration
- Carbon emission reductions
- Excellence and innovation in cultural programming
- Audience development
- Creative exports.

Our survey of members found that:

- 1 in 5 venues require at least £5m each in the next 10 years just to continue current operations.
- Without significant capital investment in the next five years, nearly 40% of venues risk closure and 40% will become too unsafe to use.

However, if theatres can access the investment they need:

- 54% could provide more jobs for their local communities and 62% would increase or improve their outreach work.
- 100% of venues would improve their environmental sustainability.
- 57% would increase the variety of programming.
- 100% of buildings built in the Victorian period would be able to increase accessibility for audiences.

We welcome the opportunity to discuss ways in which the Mayor can support SOLT & UK Theatres to maintain and develop their venues to safeguard London's world leading reputation as a centre of performing arts excellence.

About us

The Society of London Theatre (SOLT) & UK Theatre work with and on behalf of our members to champion theatre and the performing arts and to create the conditions for theatre to thrive. Together, we represent 500 of the UK's leading theatre producers, venue owners and managers and performing arts centres, as well as 1,350 professional theatre makers across the UK.

South Bank Employers Group Ref No. 010

Dear GLA colleagues,

ECONOMY, CULTURE AND SKILLS COMMITTEE CALL FOR EVIDENCE

This submission to the London Assembly Economy, Culture and Skills Committee, is made by **South Bank Employers' Group (SBEG)**¹³ and **South Bank Business Improvement District (BID)**¹⁴. We welcome this investigation into the state of London's night-time economy (NTE) as the NTE is a vitally important aspect of the complex economic and cultural ecology of South Bank and Waterloo - an area that has a rich and diverse mix of: world-renowned visitor and tourist attractions; a cluster of

¹³ <https://www.sbeg.co.uk>

¹⁴ <https://www.southbankbid.co.uk>

internationally important cultural and art institutions; a vibrant hospitality sector; an important location for businesses and offices; and home to several leading education bodies and their students.

The area is an important part of London's Central Activities Zone (CAZ) and is one of the capital economic engines. It is identified as an Opportunity Area in the London Plan, capable of sustaining economic growth for many years. It is Lambeth's most important economic area. It is also home to Waterloo Station, one of the UK's busiest, and St Thomas', one of the country's leading teaching hospitals and a vitally important part of London's and South-East England's health infrastructure. The neighbourhood is home to approximately 12,000 residents, with a mix of tenures, including social housing and co-operatives.

SBEG is a not-for-profit company established in 1991 to represent the collective ambition of those businesses, cultural and arts organisations, social enterprises, statutory agencies, public institutions, landowners, and infrastructure providers on London's South Bank. SBEG's work reflects its members' desire to see South Bank as one of the most economically and culturally dynamic parts of London and the UK. SBEG works with its members and partners towards a shared vision of a better South Bank for all:

- a desirable destination for culture, business, and pleasure.
- a place which supports and encourages investment and business growth.
- a place with a flourishing and cohesive residential community.
- a place which is welcoming to visitors and tourists.
- a friendly, clean, colourful, safe, dynamic, and diverse area.

South Bank BID was set up in 2014 to improve the management of South Bank in the face of increasing footfall and falling public spending. It funds and support a number of public realm services, including enhanced security and cleaning, and promotes South Bank as a leading visitor destination and as the cultural heart of London. The BID acts as a collective voice for its levy payers, helping to ensure their perspectives are heard and their priorities acted on.

In February 2024, the BID received a 99.5% Yes vote in the ballot for its third term and its vision of ensuring that South Bank remains a world-class place for our businesses and all those that work, visit, live and study here. SBEG set up South Bank BID and acts as its delivery agent.

Both SBEG and South Bank BID are members of **South Bank and Waterloo Partnership**¹⁵ which is jointly chaired by Florence Eshalomi MP and Neil Coyle MP and works to a collective vision of a **green and thriving South Bank and Waterloo for everyone by 2030**¹⁶.

South Bank and Waterloo Partnership's work focuses on three pillars which provide the foundation for the ongoing transformation and management of our area: *An Inclusive*

¹⁵ <https://www.sbsp.org>

¹⁶ [SBWP-A-Vision-For-2030-FINAL-WEB.pdf \(usercontent.one\)](#)

Place, A Place of Opportunity and a Net Zero Carbon Neighbourhood. In July 2020, Partnership produced the **South Bank and Waterloo Covid-19 Recovery Plan**¹⁷, which is referenced further below.

OVERVIEW

In its call for evidence, the Committee has recognised that although the NTE leisure sector is now showing signs of making a recovery, new challenges have emerged, including high levels of inflation and cost-of-living pressures. This is further compounded by a trend of night-time leisure venues, pubs and restaurants closing across the UK, with LGBTQ+ venues being hit particularly hard. The Committee recognises that London has a larger night-time economy than other cities and was worse hit by the pandemic: the decline of night-time businesses has been steeper in London than in any other English region.

Pre the Covid-19 pandemic, the South Bank and Waterloo area generated over £5bn of value per annum, with 30 million annual visitors spending over £300m a year. The lockdowns of 2020 had a devastating impact on the area's economy. While activity never ceased completely, due to the presence of St Thomas', many businesses, attractions and shops lost several months of trading and faced a series of financial and operational challenges.

In June 2021, and in collaboration with Lambeth Council, we published the important and influential **Engine of Recovery** report¹⁸ which demonstrates the economic value of five of the area's cultural institutions and how this had been affected by the pandemic. Using data from 2018/19, the report showed that the five organisations delivered an annual £510m Gross Value Added (GVA) to the UK economy and attracted 5.6m visitors. This equated to 8,100 FTE jobs, with £81m being spent on external suppliers from across London and the UK. On average, each visitor to the cultural venues spent an average of £90 in businesses such as hotels, bars and restaurants, shops and transport. Visitors accounted for approximately £1 in every £25 of spend by all leisure visitors in London.

But the impact of Covid was stark - the report estimates that as a result of closure due to the pandemic, in the 2020/21 financial year £330m GVA was lost to the UK economy, with 5,500 job losses. In 2020/21, visitors dropped to 50,000 and as a proportion of all visits, those from overseas were only 1% compared to 43% pre Covid. Collectively, the five institutions lost over half of their income - around £130m.

It is because of the severity of these impacts that both SBEG and South Bank BID were early advocates of a major marketing campaign to bring domestic and international visitors back to London, which eventually led to Let's Do London.

South Bank BID invested in all three years of the Let's Do London campaign and worked with the Mayor of London, London & Partners, industry bodies and hundreds of businesses to ensure success. SBEG's CEO was a founding member of the London Tourism Recovery Board and the Tourism Advisor Group, its successor. The London Assembly is aware of the success of Let's Do London, in that over three years, the

¹⁷ [SBWP-Recovery-Plan-WEB.pdf \(usercontent.one\)](#)

¹⁸ [Engine of Recovery](#)

campaign attracted over 850,000 additional visitors to the capital, who in turn contributed £360m to London's economy¹⁹.

In terms of how South Bank's NTE has recovered, our evidence and data point to a complex picture. It is also challenging in some respects to make informed comparisons of visitors numbers, from 2021 onwards given the clear "bounce back effect" that happened in 2022 and 2023, and what has happened in 2024. Nevertheless, it is clear that businesses and operators continue to face a multitude of challenges which are combining to arrest / prevent a full recovery.

These are broadly in line with what the Assembly has identified in terms of reduced sales, increased costs (due to inflation and the pronounced increase in energy prices), and consumer uncertainty. It is also clear that the shift to working from home (WFH) / flexible working is having an impact. There are also workforce challenges, with fewer people wanting to work at night, possibly due to the cost of transport and how this adds to other financial pressures.

Some South Bank businesses that operated in the NTE did close due to the impacts of the pandemic, including Spiritland (Royal Festival Hall) and Banh Bao Brothers (Leake Street). But we have also seen many new hospitality openings, including Forza Wine and Lasdun (National Theatre), BrewDog (The Sidings), The Lion and The Unicorn (The Sidings), Peacock (County Hall), La Gamba (Royal Festival Hall), and The Victory (Waterloo Station).

Specific issues are highlighted in response to the questions that the Committee is interested in - see below.

QUESTIONS

To what extent has London's night-time leisure sector recovered from the pandemic?

What are the most significant challenges confronting London's night-time leisure sector currently?

We put these questions to several South Bank businesses, and a common response to the first of these is that "*It hasn't.*" This view has been supported by evidence that the reduction in sales (up to 20% in some leisure sectors) have been compounded by increases in costs by the same margin or higher.

This effectively wipes out any profit, and leaves nothing for business investment and / or future growth. Many restaurants and bars are not open for seven-day service, and a number are also on reduced hours of opening.

Leading hotels report that corporate bedroom nights have declined by 50% and these guests have been replaced with lower spending customers on limited budgets. Those operators that specialise in large scale conference venues / business have seen the impact of increased inbound airfares and the loss of international conferences.

¹⁹ [Mayor's "Let's Do London" tourism campaign helps delivers additional £162m tourism spend | London City Hall](#)

Prior to Covid, this was a successful part of the NTE whereby hotels benefit during the day and local venues (bars, restaurants, etc) benefit at night. London is now too expensive for these large events, despite the relative strength of the Euro and Dollar.

There is an acceptance that the shift in working practices - with more people working flexibly including at home - has fundamentally changed consumer behaviours. As one business representative commented: *“If only Thursday was the new Friday, as there are not enough people in the office on Thursday to replace Friday and to make a material impact.”*

Recent research²⁰ done by Centre for Cities and Primera has shown that the average full-time central London worker is now spending 2.7 days per week in the office per week, this is behind most of London’s global competitors.

It is telling that one of the report’s recommendations is that “national government and the Mayor of London should continue to work with central London businesses and business groups to set higher expectations of days in the office, through a ‘Let’s Do London’ style campaign.”

As noted above, the picture is complex, but it is clear that international visitors to South Bank are not back to 2019 levels, and the current pattern is “seasonal”, with some days of the working week being consistently quiet / less busy than 2019 levels. This is also shown in the passenger data that we access from Network Rail, in terms of journeys made to / from Waterloo Station.

Conversely, passenger numbers at the weekend are often greater than 2019 levels, but this does not necessarily equate to business levels in South Bank, given how Waterloo serves all of London and beyond.

We are also clear that audiences to the cultural institutions have changed since the pandemic.

We are currently undertaking updated analysis on the economic performance of the main cultural bodies, and we are happy to provide this to the Committee once complete. South Bank BID is a subscriber to the GLA’s High Streets Data Service (HSDS) and this has been helpful in mapping data relating to visitor numbers and consumer spend. We appreciate that it is still early days for HSDS, and we trust that continued investment will ensure that there are no further data outages.

Our analysis of the HSDS data is that South Bank has experienced a reduction in night-time spend in 2024 against 2023. We have also seen that transaction counts have also experienced a similar reduction, but this is less pronounced than spend. See figure 1 below:

²⁰ [Return to the office: How London compares to other global cities, and why this matters | Centre for Cities](#)

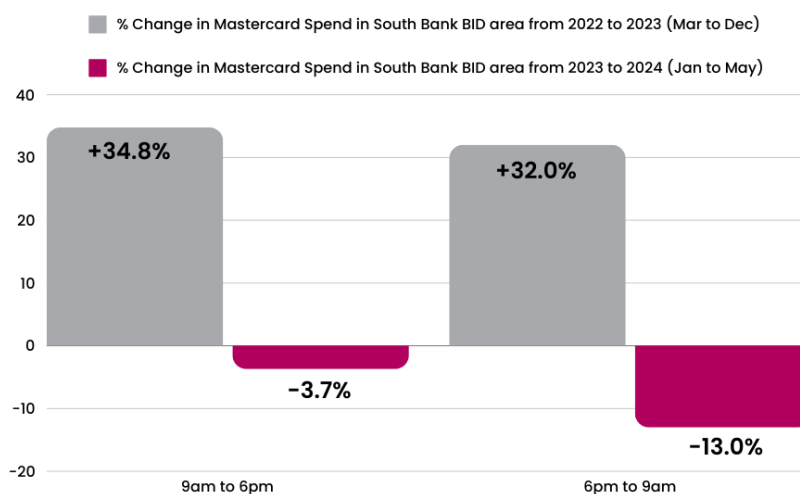


Figure 1 - Graph depicts percentage change in Aggregated Mastercard Spend Index, provided by the High Streets Data Store, between 2022, 2023 and 2024, within the South Bank BID Area

This suggests that the cost of living crisis is having a significant impact on those audiences that are visiting South Bank in that they are spending time here but are spending less. This dynamic is likely to hit the NTE spend hardest, as there’s less ‘free’ things to do (e.g. free arts programmes, etc).

What are the needs of London’s night-time leisure workforce and to what extent are they currently being met?

We believe that there are two key issues - personal safety, and easy access to reliable, affordable, and safe public transport. We also believe that “Good Work” is key, and the South Bank is characterised by many employers being accredited London Living Wage Employers.

Safety and Security is an agreed priority in the South Bank and Waterloo 2030 Vision. Under the theme of An Inclusive Place, we recognise that partnership working is our great strength: sharing intelligence, pooling resources, and acting in cooperation is central to everything we do.

We prioritise safety and security and work together to ensure resources are available to tackle key issues. By working in partnership with Lambeth Council and relevant businesses (including Merlin, given the unique S106 funding arrangement relating to the London Eye) SBEG and South Bank BID delivers and coordinates a comprehensive package of safety and security services, including South Bank Patrol, a dedicated Security Manager for the area, a team of NTE Marshals who work during the weekends, and two “S92” Metropolitan Police officers who are dedicated to the area.

These services are all relevant to the NTE and we have several examples of how effective they are in supporting the NTE economy and those that work in it. We are obviously concerned about some of the Metropolitan Police’s challenges in terms of recruitment and retention, as this is compounded by the need to abstract officers from Safer Neighbourhood Teams. Furthermore, our “own” S92 officers are regularly abstracted to other parts of central London and / or to deal with protests, marches, etc. We believe that it is imperative to ensure that neighbourhood policing is supported and strengthened in line with the Metropolitan Police’s Turnaround Plan, and we ask that

MOPAC is called to give evidence to the Assembly Committee to outline how this can best be done.

Are there any groups of people which are likely to feel excluded from London's night-time economy? If so, which groups are they and why?

Protecting and supporting vulnerable groups is an ongoing focus for all members of South Bank and Waterloo Partnership, with significant work taking place in and around Waterloo Station.²¹

In March 2023, South Bank BID, Lambeth Council, the Police, and numerous community partners and charities, including Lambeth Links and the wider LGBTQ+ community, supported a workshop dedicated to LGBTQ+ Hate Crime awareness, thereby creating a safe space to learn, raise concerns and feedback on what more can be done to help people feel safer when in the South Bank area. The workshop fostered a collaborative approach to ensuring that such crimes were reported so that appropriate levels of resources could be directed to tackle them.

Violence involving young people, and violence against women continues to be a priority for the Police, and both Lambeth Council and Southwark Council. SBEG and South Bank BID works in collaboration and partnership to tackle these priorities.

What impact have the actions of the Mayor and Night Czar had in supporting London's night-time economy?

We are happy to be on record in stating that the Mayor and the Night Czar has provided a wealth of relevant and appropriate support towards South Bank NTE, including funding, advocacy and representative, and advice and guidance. It is also right to include London & Partners here, as whilst not a formal part of the Mayoral family, their support and commitment to recovery has been very welcome. Justine Simons and the GLA's Culture Team also should be thanked and acknowledged for their work, and the support that they have consistently provided. Similarly, Rajesh Agrawal and Howard Dawber have done much to ensure that London's NTE can recover from the pandemic.

As referenced above, the Let's Do London campaign was a great success. It unified an approach across business, industry representatives, BIDs, The Mayor and the GLA team. Its creation and development led to the establishment of the London Tourism Recovery Board, which was a powerful and effective way of mobilising resources and in ensuring that the campaign was targeted and managed to achieve its ambitions. The membership of the London Tourism Recovery Board was appropriate to the task that needed to be done, and it was extremely well chaired by Kate Nicholls and Bernard Donoghue. It was also supported by an extremely effective marketing group, whose members had extensive and highly relevant industry knowledge and experience.

We especially appreciate the fact that many representatives of the GLA visited South Bank during the pandemic and immediately afterwards. Amy Lame was a key-note speaker at an important BID event that we held in January 2023 to launch The Vault Festival, and Howard Dawber was the main speaker at the launch of South Bank BID's ballot for its third term, which was held at the London SEALIFE Aquarium in January 2024. Both were evening events.

We fully support the work of the Night Czar and her team across a range of initiatives such as the Night-Time Enterprise Zones, the Night-Time Borough Champions Network, the GLA's Licensing and Regulation Group, and the LGBTQI+ Venues Forum.

²¹ See case study on p9: [SBWP-A-Vision-For-2030-FINAL-WEB.pdf \(usercontent.one\)](#)

What further action could the Mayor and Night Czar take to support London's night-time economy?

We suggest and advocate for the following:

- Continue to invest in the GLA's HSDS service and ensure that London & Partners are fully resourced to provide regular, timely and accurate data and insight to all key stakeholders in the NTE. We advocate a further evolution of the HSDS service - based on the current Incubator programme to provide specific and bespoke insight and advice where needed.
- It would be useful for London's Tourism Advisory Group to hold a focused discussion on London's NTE and how it can / should be better supported. This should include further consideration of how London can collectively invest in major marketing campaigns and relevant activations to ensure that domestic and international visitors continue to come to London.
- The GLA should review and update all relevant strategies relating to the NTE, including its Culture strategy and the 24-hour Vision.
- The Mayor of London and the GLA should ensure that the NTE is included in the London Growth Plan. The NTE is not currently identified as a specific priority.
- The Assembly Committee should look at how MOPAC and the Metropolitan Police are addressing the resourcing of Safer Neighbourhood Teams, and how neighbourhood policing can be better supported by reducing instances of abstractions, etc.

We hope that this submission is helpful. Please do contact me if you have any questions or queries regarding any aspect of this submission and the work that SBEG and South Bank BID deliver in partnership with its members and partner organisations. We are happy to provide more evidence if helpful and attend any meetings that the Committee plans to hold as part of its work.

UKHospitality, Ref No. 011

Subheading

London Assembly - Economy, Culture and Skills Committee Inquiry into London's night-time economy

About UKHospitality

• UKHospitality is the leading trade body for hospitality, representing more than 740 members and 130,000 venues across the UK. As a sector, hospitality contributes £93 billion to the economy, employs 3.5 million people and generates £54 billion in tax for the Treasury.

• The body speaks on behalf of a wide range of leisure and 'out-of-home' businesses, from FTSE 100 enterprises to medium-size groups and independent single-site operators, as well as 6,000 affiliated operators.

- Engaging with Government, the media and the public, UKHospitality works to develop a robust case on how to unlock the industry's full potential as the biggest engine for growth in the economy and ensure that the industry's needs are effectively represented.
- Hospitality represented 10% of UK employment, 6% of businesses and 5% of GDP in 2019.
- Hospitality and leisure businesses are central pillars of London's late-night economy, with the hospitality sector being the city's second largest employer overall with almost 600,000 employees – many of these working at night.

UKHospitality response

To what extent has London's night-time leisure sector recovered from the pandemic?

It is important to note that whilst the pandemic and associated restrictions had a major impact on the night-time leisure sector in London, there have been a number of subsequent 'crises' that impacted and continue to affect the sector, namely around employment, energy costs, supply chain costs, and 'cost of living' impacts on our customers and their spending ability. Thus, when we reference pandemic impacts, it is challenging to disaggregate this from the subsequent impacts that continue to be felt.

As an indicative assessment, the hospitality sector saw the biggest economic declines of all sectors during the pandemic. Periods of public health restrictions saw large falls in output. The peak of the economic downturn was in April 2020, where economic output in the food and accommodation sector was 90% below pre-pandemic levels (February 2020). Overall, hospitality economic output over 2020 was 42% lower than 2019. In 2021, hospitality output was 21% lower than 2019. The hospitality industry's share of the UK economy fell from 3% in 2019 to 2% in 2020 and 2021 (Source: ONS).

In terms of recovery, overall hospitality sales figures have performed robustly over the course of the 2023-4, though the headline increases are undermined by extremely high cost increases (see challenges in answer to question 2). While trading has exceeded the rate of CPI in most months, this does not reflect the level of input costs the sector has been facing, which are estimated to be closer to 15%.

The picture versus pre-pandemic is even more stark, with the sector struggling to recover to 2019 levels in real terms. Again, costs are estimated to have risen for the sector substantially higher than the rate of CPI so the level of profitability in the sector will have fallen substantially.

In terms of how London's night-time leisure sector has recovered, the below chart shows the GVA contribution of the city's vs 2019 and other areas of the UK:

Figure 23: Regional GVA contribution of the UK hospitality industry

	GVA 2022 (£bn)	GVA 2019 (£bn)	2019-22 Growth (%)	% of UK Hospitality GVA	Hospitality as % of Regional GVA
North East	2.3	2.0	18.3%	2.5%	3.4%
North West	10.2	8.3	23.5%	11.0%	3.9%
Yorks & Humber	6.1	5.2	16.8%	6.5%	4.2%
East Midlands	5.0	4.4	14.2%	5.4%	4.0%
West Midlands	6.7	5.7	16.1%	7.2%	3.8%
East of England	6.5	5.6	15.2%	6.9%	2.9%
London	22.2	20.8	6.2%	23.8%	4.0%
South East	11.8	11.0	7.9%	12.7%	3.2%
South West	8.8	7.4	17.7%	9.4%	5.5%
Wales	4.0	3.7	7.9%	4.3%	5.9%
Scotland	7.6	7.0	8.3%	8.2%	4.5%
Northern Ireland	1.9	1.7	11.6%	2.1%	3.8%
Total UK	93.1	82.9	12.2%	100.0%	3.9%

Source: ONS data, Ignite Economics estimates

This shows an increase on 2019, but as above given the increase in costs this does not necessarily represent a growth in profitability in the intervening period.

In summary, the night-time leisure sector in London has recovered to some extent, however it does remain in a precarious position due to higher costs, fiscal and regulatory roadblocks and consumer confidence – as outlined below.

What are the most significant challenges confronting London’s night-time leisure sector currently?

High costs are the primary driver of the challenges facing late night businesses in London currently. The source of these costs can be broadly broken down into the below categories. In addition to costs, challenges also arise from specific operational considerations operating in London – related to local regulation, crime and safety and transport. This is particularly true of central London, where restrictive licensing and operating hours (set on a borough and/or specific geographic area level) are in effect, curtailing the ability of venues to either open or operate later into the evening despite customer demand.

Customer behaviour – and in particular students – has had an impact on both the late-night sector more broadly and in London. This is expanded on below.

Cost challenges

Business rates

Business rates are calculated on the basis of ‘rateable value’, a number representing the cost of renting the business premises. Businesses that must trade in-person, and in-community – and are therefore property-intensive – have picked up an increasing and unsustainable share of the burden. This has led to hospitality paying 10% of the rates bill, despite representing 3% of contributing turnover. It is a tax on late night businesses at a time when there is a general concern felt by Londoners about the loss of these venues.

Whilst there is of course an understanding that the business rates system for hospitality and late-night leisure sits outside the remit of both the Mayor of London and London boroughs, there must be a recognition that this is one of the biggest cost pressures on operating margins and viability.

Energy costs

Energy costs remain significantly above pre-pandemic levels, though for most these have come down from their 2022 peak levels. There remains a significant minority stuck on excessive, longer-term contracts. In the year to September 2023 businesses reported that energy prices were 60% higher than in the previous year.

Wages

Even before the announcement of the 2024 National Living Wage (NLW) increases, wage rates had increased significantly – including a 9.7% increase in the NLW in 2023. Members are reporting that their wage costs have increased by over 13% and ONS data shows that average wage costs for the sector have risen by 7%. The 2024 NLW increases had a significant cost impact on hospitality businesses.

Input costs

Food and drink costs continue to rise at a rapid rate. The measure of sectoral food and drink input costs peaked at 22.9% in December 2022, before dipping in early 2023 and rising again to 22.6% in mid-2023. While this has started to fall, it is still believed to be around 15%, nearly four times the rate of inflation.

Operational challenges

All businesses operating in the London night-time leisure and hospitality space are heavily regulated. Since the pandemic, we have seen some very good examples of London boroughs using licensing and regulation to assist in business recovery and resilience. During and following the pandemic, businesses worked closely with the GLA, Night Czar and police to strengthen relationships and improve implementation of pavement licences and licensing issues. However, challenges do remain, especially in central London.

Licensing

As above, a number of London boroughs have balanced licensing policies and work in partnership to develop and support their late-night leisure businesses – recognising the wide range of benefits they bring to areas. However, in some areas – Westminster in particular – stringent limits are set for new and existing late-night businesses as to the hours they can operate, significantly curtailing the ability to match customer expectations compared to other UK and international cities. Even with the most supportive action at GLA level, without the ability to influence regressive licensing policies this holds back growth and development of London's late-night space. Roll-over use of Cumulative Impact Policies (based on outdated evidence) in some areas also hinders the ability for new entrants to the market and therefore the ability to deliver a better late-night experience.

Separately, Late Night Levies are in essence a tax on businesses opening after a certain time in the evening – which have to pay an annual charge based on rateable value. Six out of the ten late night levies currently in operation across the country are in London – Camden, Islington, Southwark, the City, Hackney and Tower Hamlets.

UK Hospitality has long pushed for Late Night Levy regulations to be repealed. We welcomed the findings of the 2017 House of Lords Report that stated the Late-Night Levy had “failed to achieve its objectives, and should be abolished”, and best practice initiatives favoured in its stead.

The need to remove outdated restrictions such as Levies has come into even sharper focus following the recent pandemic. Indeed, the fact that the late-night sector was one of the very few sectors unable to trade at all during the pandemic gives further weight for the need for Late Night Levies in London to be abolished. Elsewhere in England, some authorities have recognised this by scrapping levies they had introduced. We feel that in order to support late-night businesses, all levies imposed in London should be reviewed and removed.

Planning – agent of change

A significant number of late night businesses in London – whether they are nightclubs, pubs, dedicated music venues, restaurants and many others – utilise music (both live and recorded), which is important for customer satisfaction, cultural benefits and many other reasons. All hospitality business will generate external noise to some extent (be this from customers entering and leaving the premises, deliveries, outdoor areas etc.) which is part of the normal day-to-day business operation of the venue. There are many safeguards in place – primarily through the licensing regime – to ensure that the above noise generated by premises is proportionate, that the views of existing residents are taken into account, and the business itself is judged on a case-by-case basis to ensure a balance between successful operation and any local views.

However, concerns have been raised where new residential developments have opened up in the vicinity of existing hospitality venues. Prior to 2018, there was no onus on those responsible for new developments to mitigate impacts from existing permitted hospitality venues for new residents. This led to a slew of challenges to long-established venues who had been operating within the existing safeguards, from new residents who objected to noise from existing premises having moved next to or near such businesses.

The unfairness of this position for existing businesses was recognised by Government following representations from UKH and a range of other stakeholders, leading to the adoption of the ‘agent of change’ principle within the National Planning Policy Framework in July 2018. This puts an onus on the ‘agent of change’ – in essence the ‘agent’ (e.g. a housing developer) introducing a ‘change’ to an area (for example building new housing next to existing businesses) to put mitigations in place within the new development to reduce the impact of noise. This could include sound proofing and the like.

Whilst this was a very welcome first step, there remains a lack of understanding as to how this principle works on a practical level – and crucially how it interacts with other relevant regulatory regimes such as licensing. The House of Lords, in its influential reports on the licensing regime published in 2017 and 2022, recognised this – as have a number of other reports and working groups in recent years.

The agent of change link was made between planning and licensing in 2022, with reference to the principle being included in the statutory Section 182 Guidance to the Licensing Act 2003 – which whilst welcome, has led to practical issues on the ground in terms of making agent of change work effectively in practice. Our concern remains that the agent of change principle lacks ‘teeth’ and there should be a legal obligation for developers to assess and make provision for noise issues that may arise from pre-existing hospitality businesses.

Crime

Our late-night operators, particularly in central London, have in recent months reported increased crime outside their businesses – particularly with phone theft affecting their customers leaving venues. Concerns have been voiced around policing resources and presence, with some businesses making significant investments in their own security provisions not just inside but around their venues, due to the increase in street-level crime. This has an impact both on business cost, but also customer confidence and staff safety.

Customer behaviour

Customer behaviour since the pandemic has been impacted by both habitual/working pattern changes and affordability challenges.

The September 2023 Rekom Night Index showed that on the latter challenge, between 2022 and 2023 over a third (34.9%) of respondents reduced the number of times they go on a night out. Nearly half (49.6%) of those said this was a result of increased general living costs, followed by more expensive bills (42.8%) and the need to save any spare disposable income (33%). Increased rent became a main concern for over a fifth (21.19%) of those aged 25-34.

The survey showed that spending time with friends continues to be the most popular reason for going on a night out (61.4%), yet with financial pressures are impacting on the ability to do so. Working patterns – with many London workers (and potential late-night users) working from home on specific days of the week – has had an impact. This has seen a shift in custom to different days of the week (Friday to Thursday for example), but anecdotally businesses report some customers wanting to go out earlier and go home earlier, linked to a number of factors (including cost of private transport home later into the evening).

What impact has the Mayor and Night Czar had in supporting London’s night-time economy?

UKHospitality CEO Kate Nicholls was the chair of the London Late Night Commission, the work of which culminated in the 2019 ‘Think Night’ report. This made a series of recommendations, a number of which were taken forward by the Mayor including the establishment of a Late Night Data Observatory to monitor and maintain statistics and data relating to this key area of London’s economy.

UKHospitality supports the Mayor’s vision for a 24-hour London, and the work of the Night Czar and her team across a range of initiatives such as Night-Time Enterprise Zones, the Night-Time Borough Champions Network, the GLA’s Licensing and Regulation Group, LGBTQI+ Venues Forum and more.

During the pandemic, even with many late-night businesses closed throughout – the Night Czar, police, local authorities and business groups worked closely to ensure that where businesses could open safely (and to highlight that many late-night operators were unable to trade for the entirety of pandemic restrictions with associated impacts) they could do so as effectively as possible given the situation at the time, and escalate operational issues that developed quickly for resolution.

A particular focus has been around preventing violence against women and girls at night. UKHospitality is a signatory of the Women’s Night Safety Charter and part of our role as signatories is promoting the work of the charter to our membership as well as encouraging them to become signatories. Our CEO Kate Nicholls is a member of Women’s Night Safety Charter Steering Group which was set up to give greater ownership of the charter to the signatories and support its work as a sustainable initiative and a model of best practice for hospitality venues.

We are committed to supporting hospitality venues to provide both a workplace and customer experience in which everyone feels safe and enjoys using hospitality. Hospitality must be accessible for everyone to use without customers fearing for their safety. By becoming a signatory of the charter businesses signal they are taking an active role in supporting staff and customer safety in hospitality and the training and programmes they take part in are in aid of reducing violence against women and girls.

When giving evidence in the House of Lords, UKHospitality CEO Kate Nicholls has said: “Hospitality venues create light and life on high streets throughout the day and through to the evening. The industry plays a huge part in regenerating town centres, from reinvigorating disused sites to working closely with local areas to provide services for the community.” For women and girls travelling across London it is vital hospitality remains open and accessible late at night so those travelling throughout the evening can use hospitality not just for the service it provides itself, but for the light, life and shelter it can give to anyone.

What further action could the Mayor and Night Czar take to support London’s night-time economy?

As set out above, there has been significant action undertaken by the Mayor and Night Czar to support London’s late-night economy, with dialogue between the GLA and hospitality/leisure

businesses being a key part of this. We look forward to this continuing, and going forward, specific suggestions for action include:

- Focus on aligning boroughs which currently operate restrictive licensing frameworks with the Mayor's 24-hour London vision, which will help development of the late-night sector and create an equitable balance between supporting businesses and local considerations;
- Use future powers (such as the English Devolution Bill) to use any devolved powers to support late night businesses with cost pressures;
- Abolish late-night levies across all London boroughs;
- Explore the designation or development of existing and new areas as specific late-night environments – examining both support for businesses and the wider supportive infrastructure (food, transport, residents).
- Work together with police, businesses and wider stakeholders to address street crime in late-night hotspots and create a dedicated hospitality police point of contact for affected businesses;
- Continue to increase communication around the positive initiatives and work already ongoing – such as the Women's Night Safety Charter – to drive take-up and profile.

Philip Kolvin KC, Ref No. 012

Summary

This document deals principally with the question of what action the Mayor should prioritise to support London's night-time economy.

The Mayor's previous approach was to have a Night Time Commission and a Night Czar. The Night Time Commission existed only briefly, while the Night Czar position is currently vacant. This gives the opportunity for re-evaluation of the approach in the light of experience not only in London but in North America, Europe and further afield.

It is recommended that the Mayor should convene an Office for Nightlife, capable of forming an effective bridge between the Mayor and national government, and an effective network with night time economy advisors in the London boroughs, capable of convening experts in the relevant sectors (e.g. business, economy, regeneration, tourism, policing etc), driven by an overall strategy with measurable outcomes.

Background

I am a licensing barrister, acting across the whole field of licensing for the industry and national and local regulators. In relation to London, my work has included helping Westminster City Council to devise (and then defending in court) the nation's first cumulative impact policy, and leading the legal teams which recovered the licence for Fabric, and protected the licence for the O2 Academy Brixton.

I am the author/editor of a number of textbooks in the fields of licensing and allied sectors and a regulator contributor to the Journal of Licensing.

I am also the author of *Darkest Before the Dawn*, the Night Time Industry Association's Manifesto for the Night Time Economy 2024, which has been well-received across England, Scotland and Northern Ireland.

I am a Patron of the Institute of Licensing and a former Chair of that organisation, Best Bar None and Purple Flag. I am a former member of the Mayor's Commission for a Sustainable London 2012, and Board Member of the Sports Grounds Safety Authority. I am currently a Co-Chair of Crystal Palace Park Trust, a trustee of The Loop (a drug testing charity), and a trustee of the Edge Theatre (which works with homeless and disabled individuals).

I was the first Chair of the Mayor's Night Time Commission, from 2017-2108, devised the concept of Night Time Economy Borough Champions and wrote the Mayor's vision From Good Night to Great Night, a vision for London as a 24-hour city, which contained ten principles for the development of London at night.

I also wrote the chapter on state support for the night time economy in the Global Night Time Recovery Plan.

The views expressed in this document are my own as a London citizen, and are presented with the sole purpose of achieving the best result for London.

Gauging success

Over the last 8 years, there have been some notable achievements generated from City Hall, including the protection of night culture through the London Plan, the propagation of Agent of Change (since adopted nationally), developing the High Street Data Service and establishing the Culture at Risk Office. These initiatives are deservedly admired further afield.

But simultaneously, it has to be acknowledged that London nightlife has suffered, with a large proportion of it being lost, including in particular pubs, clubs and LBGT+ venues. City Hall has published data to attempt to paint a different picture, and I imagine that the statistics will have been presented to the Committee and argued over by others, with the reasons for the statistics debated.

It is not the purpose of this paper to adjudicate between these two positions. However, I comment that it is possible for both to be true.

The key point, however, is that it is only possible to gauge the success of this, or any, project by comparing the outcomes with the original purpose. If the purpose was to increase the number of community pubs, the strategy has failed. If it was to establish a Culture at Risk Office, it has succeeded.

I start, therefore, from what ought to be an uncontroversial proposition that there needs to be clarity about what the Mayor is seeking to achieve from his admirable commitment to London at night.

The end of sloganeering

When an administration seeks to build more affordable homes, it has no need of slogans. It decides what it means by "affordable", works out how many homes it can build, and sets out how it is going to do it. It can then be judged on whether it has delivered on its plans.

When it comes to the night time economy, there are many difficulties of definition. Is a call centre part of the night time economy? What of an A&E department, a hotel minibar, a cab driver who might work at any time, the London Underground, Deliveroo, Netflix? These difficulties play through into questions about how to measure the night time economy, but more importantly what we are trying to achieve. These are serious questions. They need to be answered so that we can develop policy which helps drive the London at night which we wish to see. For example, if we wish to see more music venues, it is no comfort that there are more dark kitchens.

Sometimes, there is a temptation to sidestep difficult questions of definition, ambition and strategy with platitudinous slogans. I would focus on just one: that London is a 24 hour city.

In the sense that people are out of bed at different times of day and night, London, like every city, is a 24 hour city. But as a policy tool, it is a meaningless slogan. For example, across much of London it is not possible to buy a drink, dance or listen to music 24 hours a day. Perhaps that is not what was intended by the concept. But the adoption of a slogan is apt to create false expectations, and lead to a public feeling that the mission has been a failure. That certainly appears to be a widely held perception amongst Londoners. It leads to City Hall being blamed for closures over which it has no control and taking credit for saviours/openings over which it has had no or minimal influence, neither of which is satisfactory.

The Night Czar

This paper is not concerned with the performance of the previous Night Czar, but with the concept of the role.

In my first textbook, written in 2004, I pointed out that the night time economy (then itself a nascent term coined in the UK), was concerned with cross-cutting themes of licensing, health and safety, planning, environmental health, regeneration and so on. What was needed was an individual who a) had the intellectual qualities to survey the entire landscape and b) the convening power to bring policy makers and experts together to create a strategy for the night time economy and then deliver it by all means at their disposal. I remain of that view, although would say that it does not need to be one individual. I would cite the record of Howard Bernstein in Manchester as an exemplar of the role.

Since the appointment of Mirik Milan the highly successful Night Mayor of Amsterdam in 2012, many towns and cities have appointed night mayors or czars. London was an early adopter of the concept.

However, it is notable, though not generally understood, that the Night Mayor of Amsterdam was not a personal position but an NGO, which performed an advocacy role between industry and government.

In my view, and speaking generally rather than specifically with regard to London, before appointing a Night Czar, one needs to ask:

- 1) Should they be sitting inside or outside government?
- 2) Should they have regulatory powers?
- 3) What exactly is the purpose of their role?
- 4) How is their success to be measured?

If these questions are not answered, the role is likely to be a failure. If they are answered conscientiously, that may lead to the conclusion that there are better structures for the delivery of a successful night time economy. Not to ask these questions at all is not a serious option.

In the case of London, given that there is currently neither a Night Time Commission nor a Night Czar, it is timely to consider what is the best structure for the Mayor to advance the cause of London's night time economy.

In my view, one problem with the term "Night Czar" is that it is meaningless. In its modern sense, "czar" tends to denote someone invested with power or authority. If they have neither - their purpose not declared and their goals/KPIs not set - it is inevitable that they will be judged not against any objective criteria but against the inflated expectations of the industry, the public and the press. This is self-defeating. It also means that public money and energy is dissipated by channelling it into a role which cannot genuinely deliver the results which stakeholders desire.

Far better, in my view, to appoint a policy or business expert(s) to advise the Mayor than an individual without policy or business experience to a role with an inflated title, in which they are sure to fall short of the public expectations of such an office-holder.

London's night time economy is too important, and its citizens too grown up, for slogans and inflated job titles. There is a job to be done to support an economy, much of which is suffering. It is time to appoint the right people to work on the problem.

Towards a solution

In dealing with the night time economy, the Mayor is limited by a large number of constraining factors:

- He is squeezed from above by national government, which has the major influence over the night time economy, e.g. as a result of business rates, VAT, alcohol duty, planning Use Classes, national planning policy, transportation funding etc.
- He is squeezed from below by his absence of powers over the boroughs, in particular regarding licensing policy and decision-making, with no equivalent of the London Plan or call-in.
- He has very little influence over macro-economic factors, such as Brexit, the loss of European workers, commodity prices and the cost of living, and therefore has very limited control over their impact on the night time economy.
- He has equally little influence over consumer trends which bear on the night time economy, such as alternative calls on income (home entertainment, gym membership) and declining spend on the night time economy offer (e.g. pre-loading, reduction of spend on alcohol, and increase of spend on festivals).

These constraints are readily understandable. However, they are not generally understood, which has led to much of the negative press around City Hall's night time economy work in recent years and a degree of overclaiming of success by City Hall, which in turn leads to charges of inauthenticity.

It would be far better if, in place of inflating explanations by using of terminology such as "24 hour economy" and "Night Czar", there was a realistic appraisal and communication of the position and the implementation of structures capable of delivering defined outcomes for a realistic cost.

An Office for Nightlife

In *Darkest before the Dawn*, I propounded improved national governance of the night time economy through appointment of a Minister for the Night Time Economy and a national Night Time Economy Strategy. These appear to me to be critical strands in a concerted national approach to saving an economy, parts of which are disappearing before our eyes, particularly in the SME and cultural parts of the industry.

The Night Time Industries Association continues to promote these key ideas at government level, with a generally warm response.

The Manifesto envisages that national strategy will cascade down to regional Offices for Nightlife, which will in turn inform local night time strategies developed by local authorities.

The above is the structure for planning, with the National Planning Policy Framework informing the London Plan which informs local development plans. A similar structure for the night time economy would provide a framework of support which, in the view of industry, has been lacking in London.

The work of the Office for Nightlife would be defined by the Mayor, and would certainly include the promotion of the night time economy, and the protection of users, workers and local residents. There will be many ideas about how this should be done. *Darkest Before the Dawn* sets out 44 such ideas under headings including Placemaking, Licensing, People, Best Practice and Costs and Finance. These ideas for local action have been well received across the UK.

Importantly, an Office for Nightlife for our capital city would carry significant influence at national level, and in relation to important ongoing debates such as business rates, VAT and worker visas, while being able to continue with the Mayor's work of convening and energising local authorities in London to support their night time economies. As a professionally resourced and non-political organisation, it could be realistic about its goals, and could be judged according to the performance indicators set for it by the Mayor, rather than unrealistic aspirations set in a vacuum.

Conclusion

London was one of the first cities in Europe to see the value of treating the night time economy as worthy of specific support.

With the benefit of experience, both as to what is achievable and what works, it should now develop an Office for Nightlife, a professional and accountable organisation, developing and using internationally recognised tools to help promote the night time economy while protecting those affected by it.

Philip Kolvin KC
11th October 2024