

Managing the Night-Time Economy Findings from Research

Marion Roberts

University of Westminster

Presentation to Stadt Nach Acht Conference

Berlin 11 November 2017

Tourism & the Night Symposium

University of Westminster, London July 2017



- Organisers: Dr Adam Eldridge, Dr Ilaria Pappalepore, Dr Andrew Smith
- 20+ presenters, 2 keynotes
- Berlin, Frankfurt, Girona, Lisbon, Montpellier, Budapest, London, Brussels in the European Union, Iran, Australia and north America
- Research students, academics, pcity officials

Managing the Night Time Economy

- What is the night time economy?
How can we measure it?
- How can we enhance the visitor experience?
- What are the potential downfalls?
How can they be overcome?

Measuring the Night Time Economy

Time Periods, Types of Businesses, Economic Indicators, Other Activities, Cost Benefit Analysis

Fideli & Lennon Glasgow Caledonian University

Understanding and Measurement of Glasgow's Night Time Economy (18.00-06.00 hrs)

ESSENTIAL DATA

Glasgow is the largest city in
Scotland with 600,000 inhabitants
It has 2.2 million tourists a year
- 1.6 million come from the UK



Fideli & Lennon Glasgow Caledonian University

Understanding and Measurement of Glasgow's Night Time Economy (18.00-06.00 hrs)

- TRADITIONAL SECTORS

- Restaurants and Food
- Pubs & Bars
- Nightclubs
- Cafes and Teas
- Music & Performance
- Theatres
- Cinemas
- Casinos

- UNCONVENTIONAL

- Bookmakers (gambling)
- Amusement Arcades
- Retail (after 18.00 hrs)
- Galleries, Museums (after 18.00 hrs)
- Gyms and Spas
- Parking
- Taxis
- Public Transport
- Hotel Banqueting Facilities



- **EXCLUDED**

- Accommodation (e.g. hotels, bed & breakfast)
- Air BnB, short-term private letting
- Tax
- Illegal or undeclared activities (e.g. prostitution, taxi-touting)

Fideli & Lennon Glasgow Caledonian University Understanding and Measurement of Glasgow's Night Time Economy (18.00-06.00 hrs)

ECONOMIC BENEFITS

- 13.5% of City Centre Gross Domestic Product
- Value (Total Output) 2.44 billion Euros
- Gross Value Added 781.2 million Euros
- 10.8% of City Centre Jobs (16,200 Full Time Equivalent)

Fideli & Lennon Glasgow Caledonian University Understanding and Measurement of Glasgow's Night Time Economy (18.00-06.00 hrs)

TBR Consultancy Cost Benefit Analysis for Westminster City Council, London

Westminster Evening & Night Time Economy:
A Cost Benefit Study for Westminster City Council
Summary of Key Findings
July 31st 2015



Access at
<https://www.westminster.gov.uk/evening-and-night-time-economy>

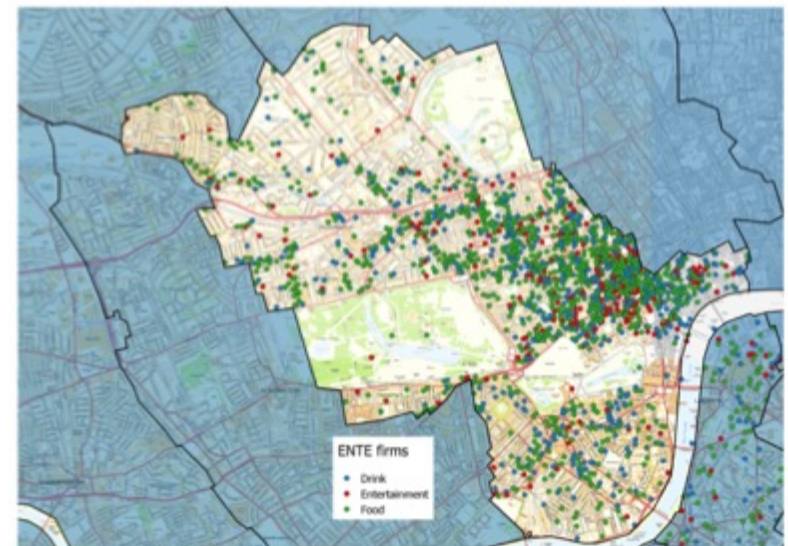
TBR Cost Benefit Analysis

- Westminster has high concentration of ENTE uses and cannot be compared to any other UK city

- 500 pubs & wine bars
- 2,500 licensed restaurants
- 136 nightclubs
- 20 casinos
- West End has 60 cinema screens
- 40 theatres
- 4 major concert halls

- 200million visitors/year

Figure 8: Core ENTE Firm Distribution in Westminster



Source: TBR observatory PN01416R

7.3 The Value of the Core and Non-Core ENTE to Borough Economies

14246 Words

English (US)

Focus

36% Licensed premises in 6% of area

TBR Consultancy Cost Benefit Analysis for Westminster City Council, London

- DEFINITIONS OF EVENING AND NIGHT TIME (ENTE) ACTIVITY
- Time Definition
 - 18.00-00.00 ('evening')
 - 00.00-06.00 ('night')
- 'Core' Activities
 - Food-led
 - Drink-led
 - Entertainment
- 'Non-Core'
 - Includes activities where primary day-time activities extend into evening
 - (e.g. retail, transport, accommodation associated with ENTE)
- 'Corporate'
 - Corporate headquarters of ENTE businesses (e.g. hotel & restaurant chains)

TBR Consultancy Cost Benefit Analysis for Westminster City Council, London 2013 Figures

COSTS Difficult to Assess

- Public Health Costs £29m
- Police & Justice Costs £37m
- Transport Costs £95m
- Local Authority Costs £26m

TOTAL £187million

TOTAL BENEFITS

- Direct Core ENTE Sales £2,509m
- ENTE Business Rates £123m
- Gross Income Tax £90m
- VAT as aprt of Sales £500m

TOTAL £3,333 billion

TOTAL COST BENEFIT RATIO 17.1

How can we enhance the visitor experience?

Festivals, events, lights, music, atmosphere

Night Time in Islamic Countries

Tourism & Pilgrimage

Esfahan – enjoying tea in a Persian garden

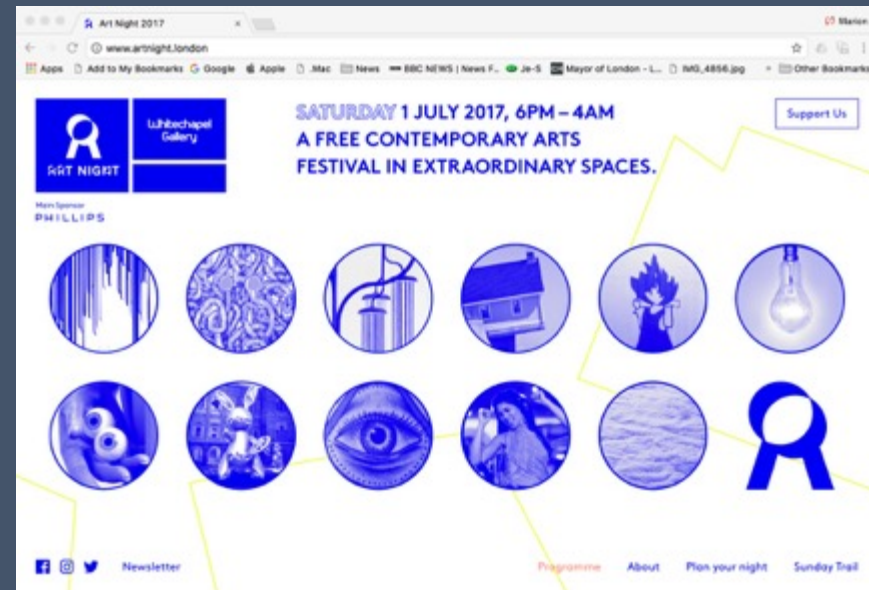
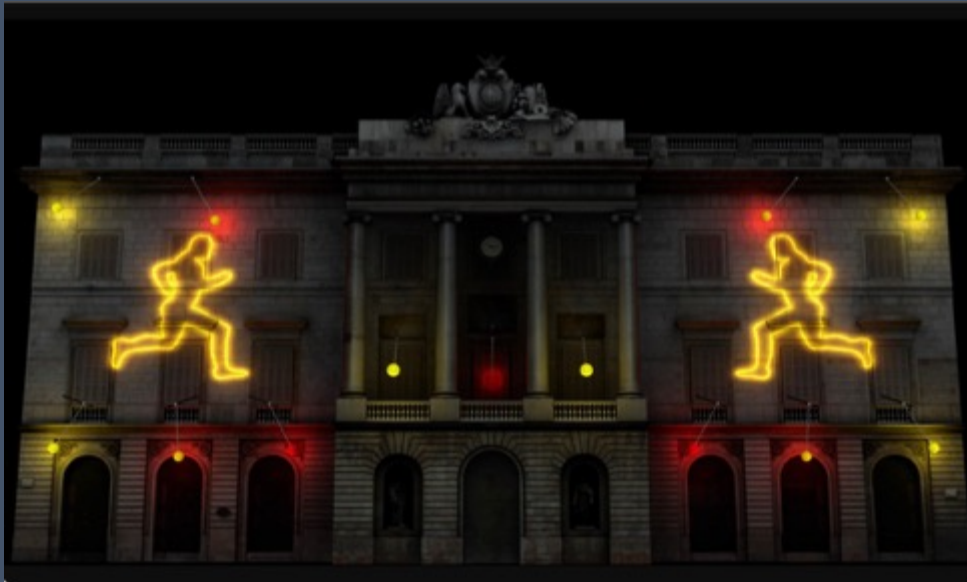


Mashhad – pilgrimage to the tomb of Imam Reza



Atepheh Amid (PhD) Night, Space and Urban Design: Case Study of Mashhad, Iran (2013) University of Westminster (Access on ETHOS web-site)

Festivals Llum Barcelona, Art Night, London



Visitor surveys at each event found 80% of visitors came from within the metropolitan area.

The event enabled citizens to see and experience their city in a different way.

Source: Enora Robin City Leadership Lab. UCL London

Racquel Camprubi & Luis Coromina, Faculty of Tourism, University of Gerona

Secret Cinema Events London, UK

Events are advertised by mailing list and participants told of theme and where to go – unusual locations.

They combine performance, cinema, music.

The audience becomes part of the event and dresses to match the theme e.g. Moulines Rouges



Spencer Sutherland Queen West Business Improvement District, Toronto

- Decline of high ('main') street
- Enduring need for social interaction
- Queen West 'go to' neighbourhood for fashion, music, culture
- For nine years has run renegade art night festival alongside Toronto official
- 'Graffiti Alley' – laneways made into tourist attraction
- Now developing music – alternative venues



City council believes better access to affordable housing, changes to noise bylaws and a new "music hub" will help Toronto's music scene flourish.



Frank's Bar Peckham
Location Top Floor of
Under-used Multi-Story Car Park

Brixton, London: Regeneration, Music & Night



Nov 2003 The Brixton Theatre is now a distant memory after being bombed and subsequently demolished during World War II. The Ritzy Cinema has occupied the space next to the Theatre since 1910, with a bar and cafe occupying the old Theatre entrance.



Copyright © London Borough of Lambeth

1975 view.



Entrance to Brixton Village (Granville Arcade) on Coldharbour Lane.

The evening economy in **Brixton** ...has brought investment and vitality into areas previously struggling to compete with surrounding town centres and changing the way they look and operate.

London Borough of Lambeth (2015) Local Plan, p65

‘The emergence of Brixton’s visitor and evening economy has been one of the centre’s key successes in recent years...The role of Brixton has changed and it is no longer just a local centre. It is now a visitor destination too.

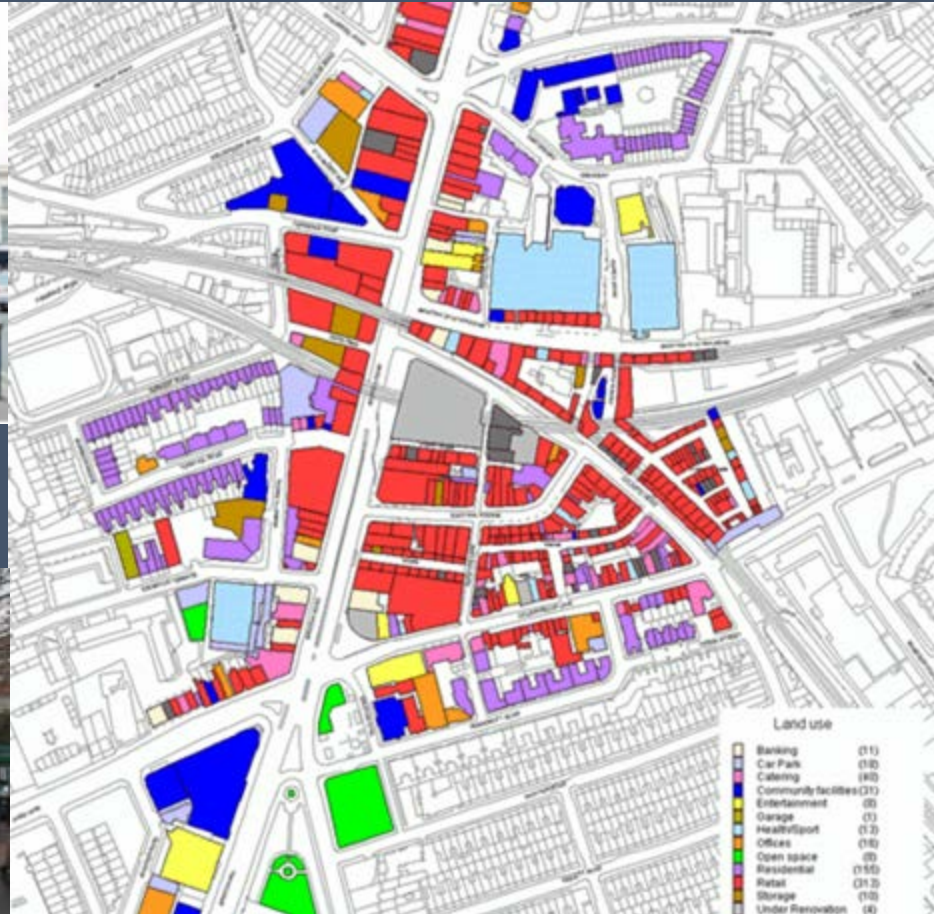
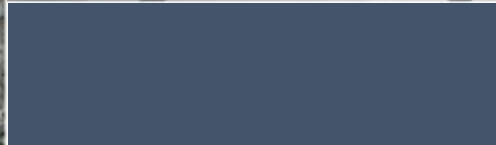
‘On going investment will...enhance its unique and world famous profile.’

LB Lambeth (2013) Brixton SPD, p 20 & p4.

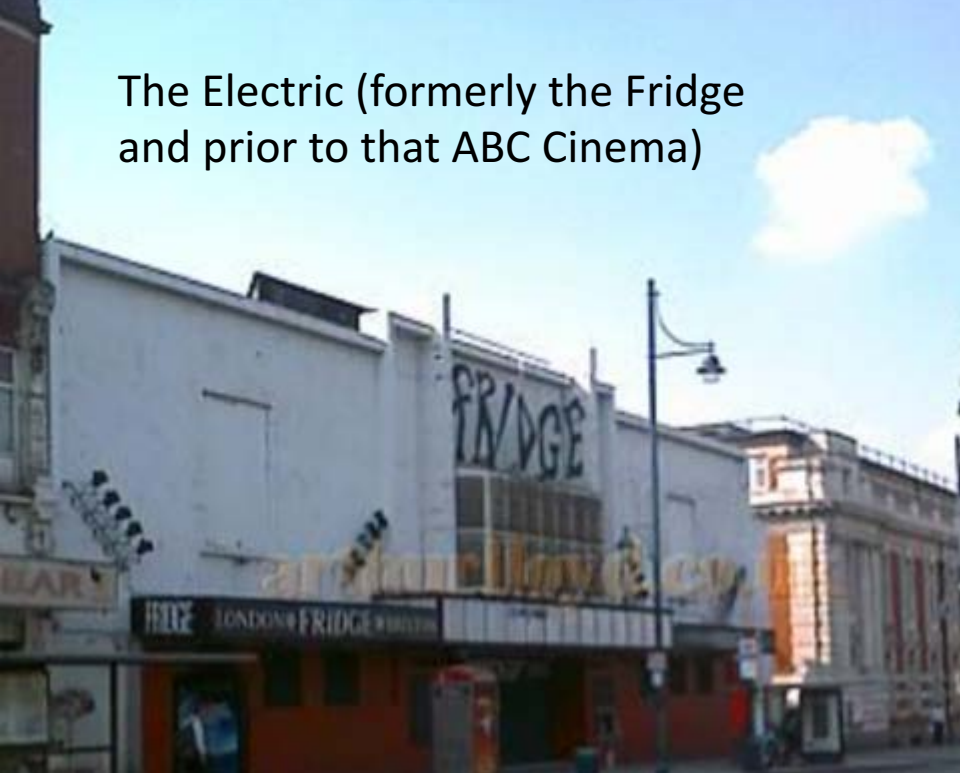
Brixton Urban Form, Deprivation & Community Tension



Brixton town centre



The Electric (formerly the Fridge and prior to that ABC Cinema)



O2 Academy (formerly Brixton Academy)



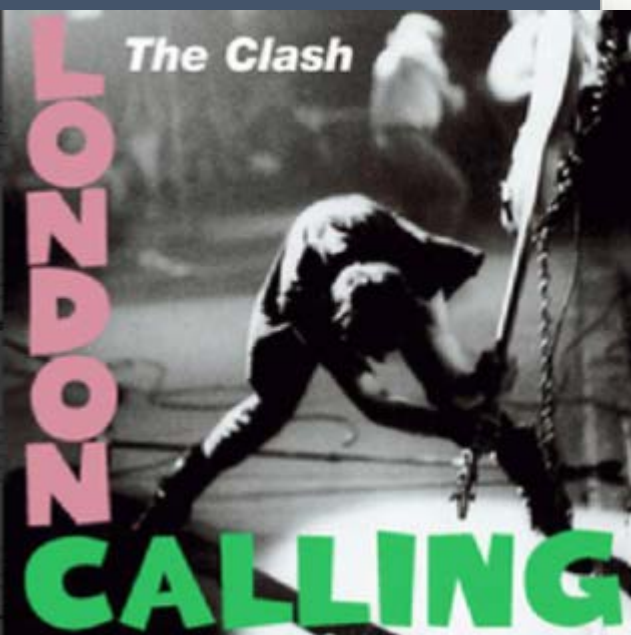
Tuning: EADGEE Intro

J = 92

The Guns of Brixton

The Clash

Jellynote

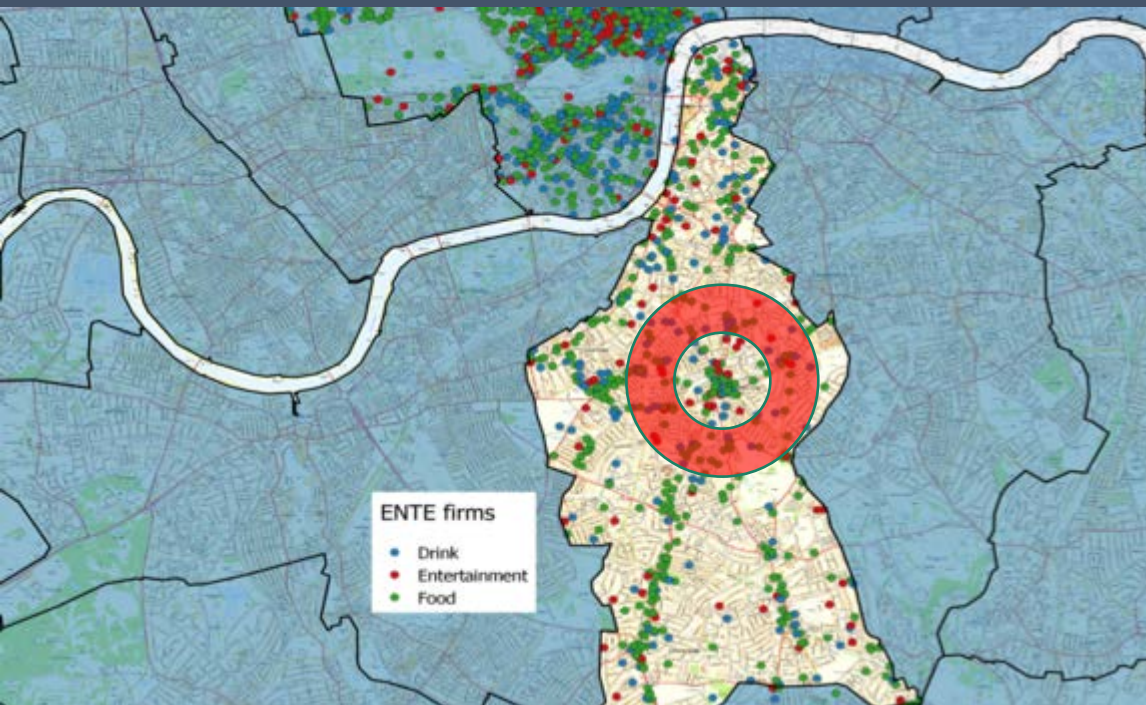


Ritzy Cinema (opened as the Electric Pavillion 1911)



Grass Roots Music

- Sound systems 'as large as wardrobes' in blues parties/outside houses replaced by numerous venues



It still seems a little bit too crazy to be true, but hip-hop legend Grandmaster Flash really did play the Brixton Dogstar on Saturday night.



Playing to a jam-packed house, the DJ pioneer showed off some of his masterful DJ skills, mixing up tunes on old school turntables and a computer.

Friday 30th June, SW9

Magic Robot at the Dogstar

389 Coldharbour Lane, Brixton SW9 8LQ, 10pm-4am, £5



WEEKENDER: WHAT'S ON IN BRIXTON

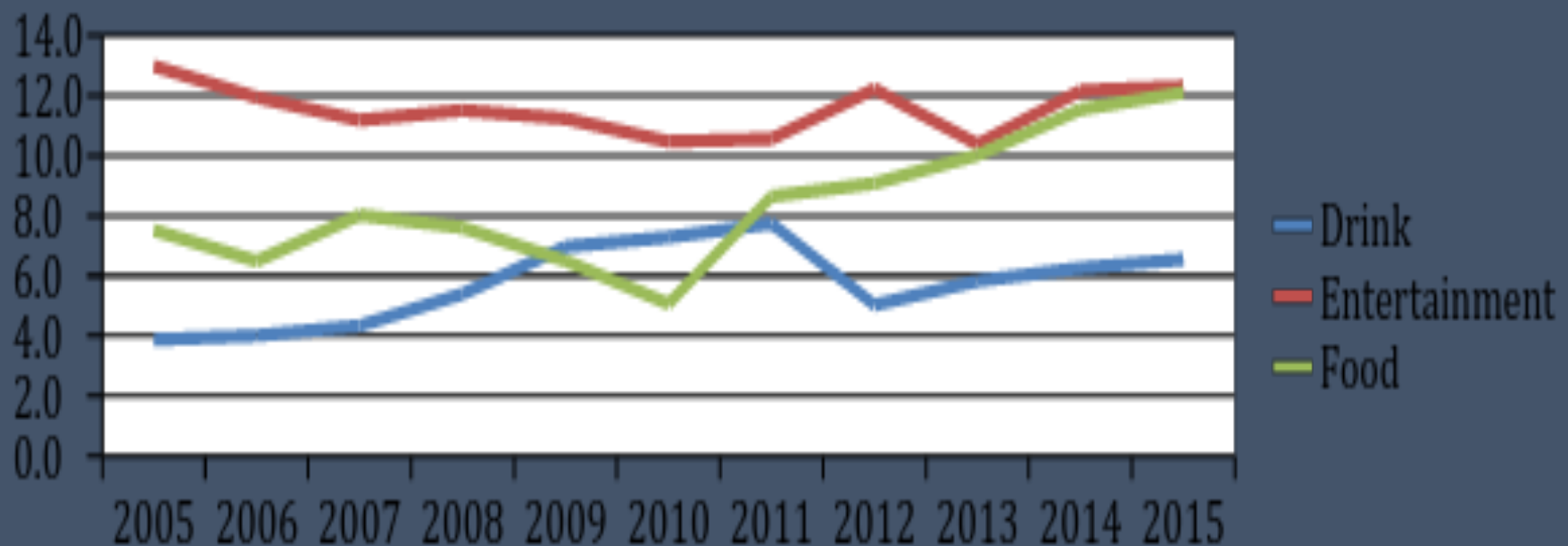




Evolution of the Markets

- The proposal to open some of the market stalls at night came from the traders in 2010. The markets are now open up until 23.30, Tues - Sun;
- Some traders have recorded and/ or live music outside their units: "... it changes the atmosphere in the market";
- Total footfall on a busy Saturday is higher between 18.00 & 23.30 (6,400) than between 09.00 & 18.00 (5,600), even though there are less opening hours at night;
- There is a synergy between gigs at the O2 Academy and footfall in the markets and Village;
- "...the late economy adds a lot of value to the market and I can see that there will be a future when we expand it, especially the opening of tube stations at night, that will help a lot."

Diversity in Brixton's Evening and Late Night Economy: note food and entertainment more than drink-led takings



Source: TBR Observatory PN01416R, analysis W1

Value of Brixton's Evening and Late Night Economy

Brixton Hot Spot		Firms	Employment	Turnover (£m)	GVA (£m)
Core ENTE	Drink	20	120	6.5	2.6
	Entertainment	15	160	12.3	4.4
	Food	60	300	12.1	7.2
Totals		95	580	30.9	14.2
Non-core ENTE	Indirect	185	910	91.1	30.1
	Supporting	5	110	2.3	1.4

Source: TBR Observatory PN01416R, analysis W1

Entertainment venues in Brixton comprise 11% of all Lambeth Entertainment venues and 12% of all Lambeth ENTE employment is Core ENTE Entertainment in 2015.

It is a small but well diversified ENTE with high value added from its food establishments.

Transport

24-hour metros around the world

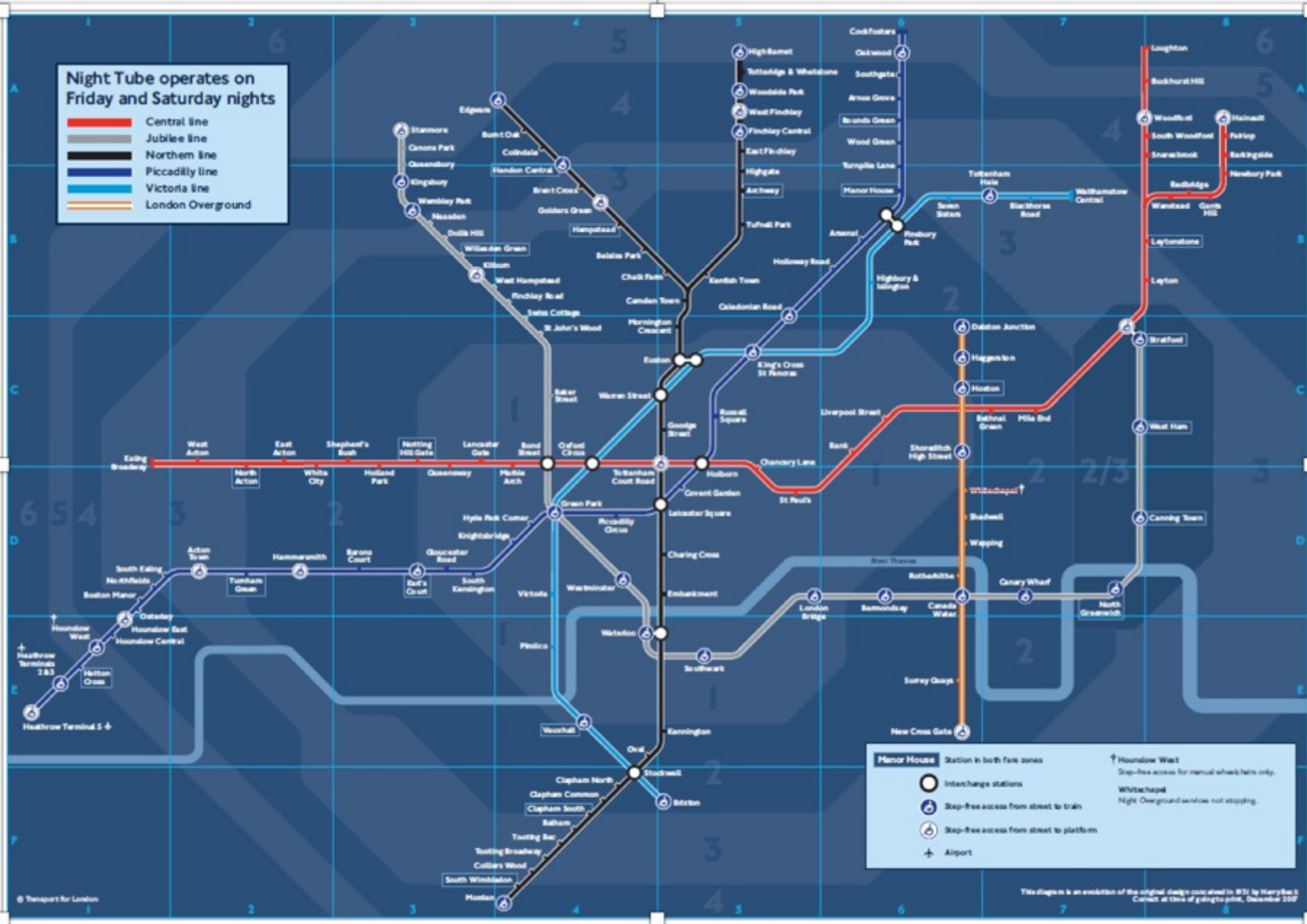


●	24/7
●	24/2
●	24/1
●	Extended



Night Tube operates on Friday and Saturday nights

- Central line
- Jubilee line
- Northern line
- Piccadilly line
- Victoria line
- London Overground



Manor House Station in both fare zones

Interchange stations
 Step-free access from street to train
 Step-free access from street to platform
 Airport

Hounslow West
 Step-free access for manual wheelchairs only.
 Whitechapel
 Night Overground services not stopping.

This diagram is an evolution of the original design conceived in 1931 by Harry Beck's. Correct at time of going to print, December 2017

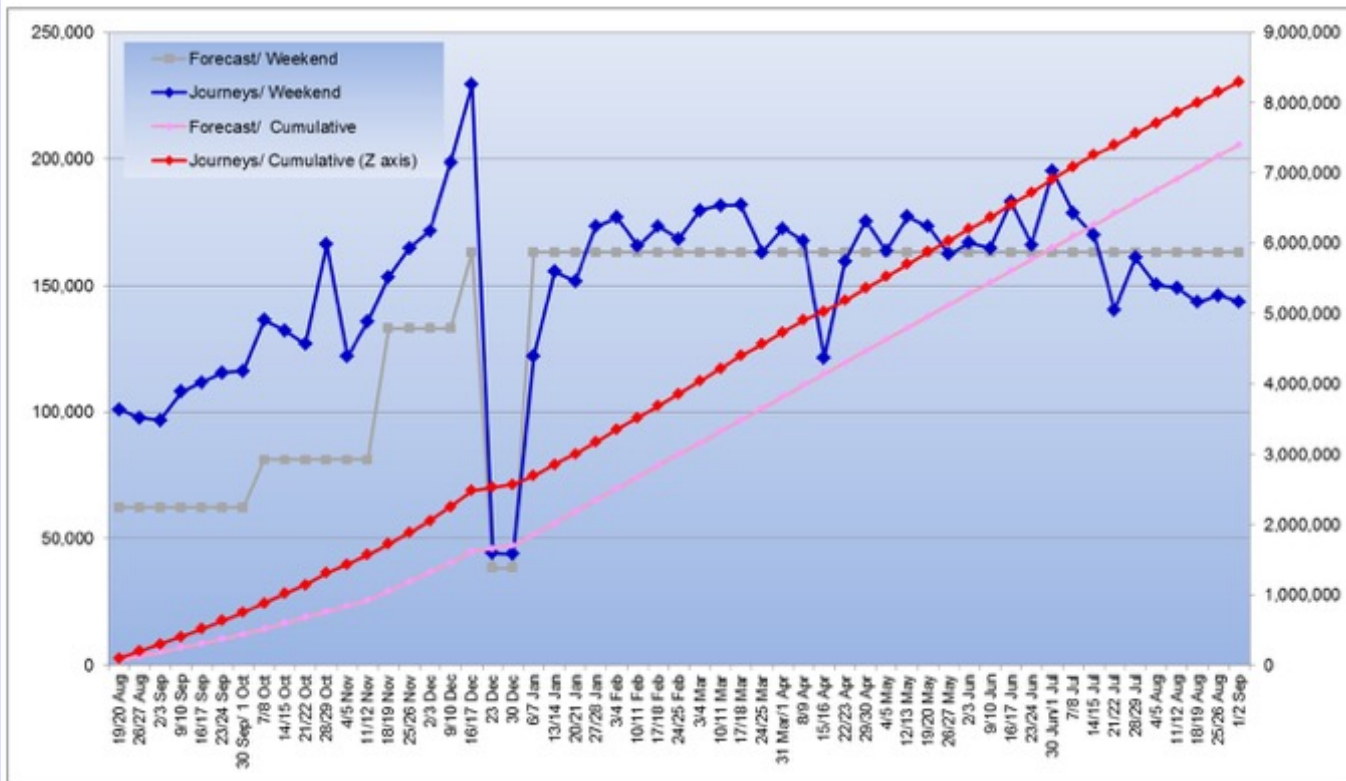
markcurran@tfl.gov.uk
tfl.gov.uk



Public Transport: Night Tube in London

Demand: Source Mark Curran Transport for London

Demand



‘Negative Externalities’

Drunken and rowdy behaviour, cultural authenticity, gentrification, studentification, pacification, impact on workers, transport

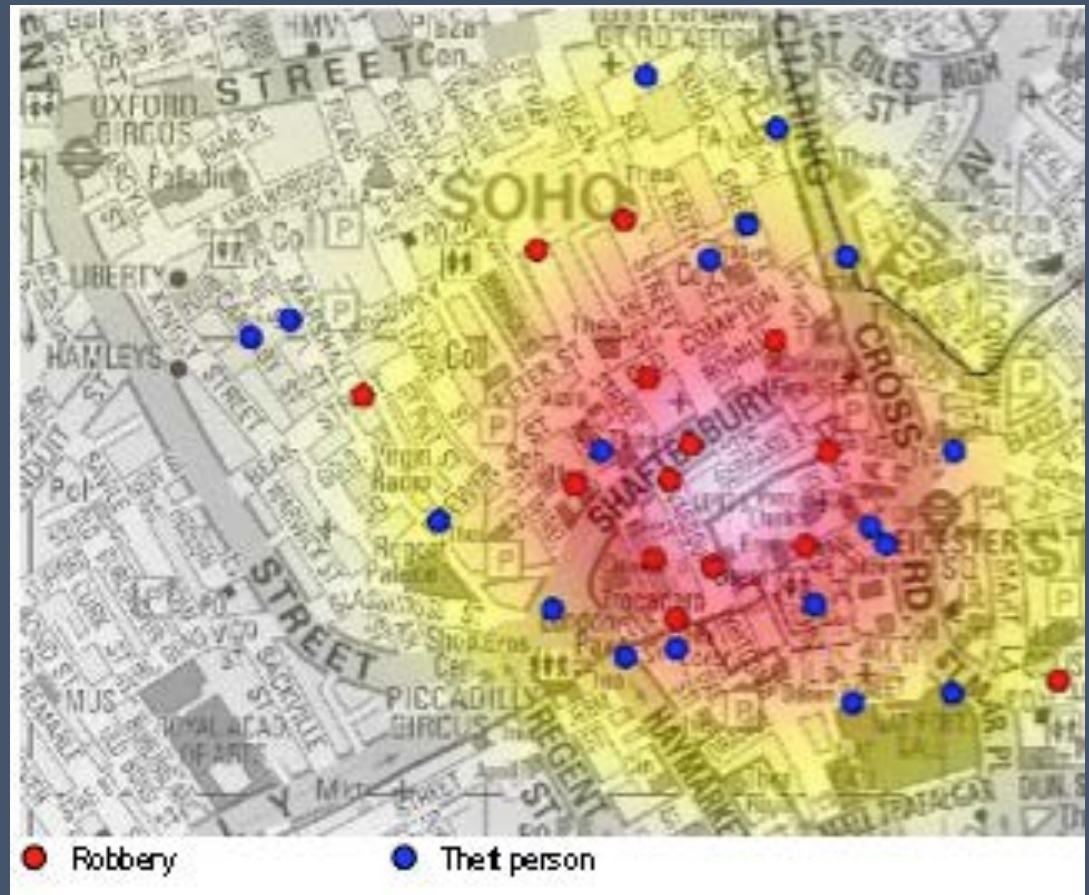
Problems of Safety at Night



Hotspot for area for
Robbery and Theft
Against the Person
Peak Days : Friday
Saturday Sunday
Peak Times: 23.00—
4.00

Typical MO Robbery of
watches, mobile
phones/wallets from
bags

Source: Metropolitan
Police, MOPAC



Emmanuele Giordano (Universite Paul Valery, Montpellier) Tourism, Students and Gentrification in Barceloneta, Barcelona

‘Invasion’ of tourists has led to complaints about noise and unruly behaviour, rising rents, short term lets, displacement of traditional bars, displacement of long term residents.

But Emmanuele makes the point that this is also due to other external changes such as gentrification, as well as tourism.



A protester holds up a sign reading 'Out with binge tourism' as hundreds of people shout slogans during a demonstration against 'binge tourism' and illegal accommodations in La Barceloneta, Barcelona



'Disneyfication' of Night Time Areas

Subculture Brixton Nightlife Tour

[This is a paid tour – £15.00]

Once you've done one pub crawl in London, you've done them all! So join one of our nightlife tours and really discover how the locals like to party! We have possibly created the best night out in London. Forget the bars and clubs around Covent Garden and Leicester Square. Venture out to an area of London that has a night food market in a cool hidden away food court full of great street art or a innovative PopUp market. We meet everyone here and munch on street food from all around the world..Colombian, Peruvian, Indian, Burgers, Crepes etc..whilst listening to cool tunes and drinking a nice cold beer or a perfectly mixed cocktail whilst getting to know the other travelers on the tour.



35% of London's grass roots music venues lost since 2007



<https://www.london.gov.uk/what-we-do/arts-and-culture/music/saving-londons-music-venues#acc-i-45694>

License Revocation – rarely used?

NME

Music V05 Festivals Film TV Food Video More +

Central London venue Madame Jojo's to reopen



Credit: Press

London: Closure of Major Night Clubs and Grass Roots Music Venues



35% of London's Grass Roots Music Venues have been lost since 2007 – Cause rise in property prices?

<https://www.london.gov.uk/what-we-do/arts-and-culture/music/saving-londons-music-venues?source=vanityurl>

Planning

- Protection of assets
 - Defining venues as cultural assets
 - Example Royal Vauxhall Tavern
- 'Agents of Change'
- Responsibility for developers of new housing to sound proof.



Open Sydney, the need for community involvement

Peta Wolifson UNSW Australia



- OPEN Sydney strategy to promote tourism and nightlife
- Tackled problems of drunkenness in city centre
- But 'lockout laws' (no entry after 01.30, no service after 03.00 controversial
- Closure of some venues, but overall reductions in crime
- Need to involve local communities

Traditional Stereotypes



Hollaback Training Key Tips for Bar Staff

1. Believe – the person has overcome barriers to report
2. Listen – take a 3 second pause before responding
3. Never assume – and respond with 'I' action statements rather than you questions (e.g. how much have you had to drink?)
4. Reporting – police, health. Harassment is illegal.(Reporting doesn't affect license)

Key Resources

"https://www.youtube.com/embed/bMWA1aEq_qM"
http://www.southwark.gov.uk/info/200030/community_safety_and_enforcement/3585/lets_talk_about_womens_safety



GOOD NIGHT OUT

WE WANT YOU TO HAVE A
GOOD NIGHT OUT

IF SOMETHING OR SOMEONE MAKES
YOU FEEL UNCOMFORTABLE, NO MATTER
HOW MINOR IT SEEMS, YOU CAN REPORT IT
TO ANY MEMBER OF OUR STAFF AND THEY
WILL WORK WITH YOU TO MAKE SURE
IT DOESN'T HAVE TO RUIN YOUR NIGHT

TWEET YOUR EXPERIENCES @GNOLimerick #GoodNightOut

FOR MORE INFORMATION GO TO WWW.FACEBOOK.COM/GOODNIGHTOUTLIMERICK



Night Workers: Exploitation or Opportunity?

PictureHouse
Strike by
cinema
workers in
London to get
Living Wage
£10/hour
Currently paid
£7.60 hour
3 union
organisers
sacked/

Cineworld bosses to meet union over living wage dispute

Meeting agreed after Picturehouse staff approached chairman at AGM following recent strike action by cinema workers



 Ritzy Cinema staff strike over the London living wage in 2014. Photograph: Alamy Stock Photo

Night Mayors: City Boosterism or City Management?



London, Toulouse, Paris, Amsterdam

Partnership Working: City Councils, Operators, Local Transport Providers Best Bar None; Purple Flag; PubWatch, Business Crime Reduction Partnerships



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**BEST BAR NONE
WINNERS**



Creating a more welcoming,
attractive and lively evening
economy



Providing a wider mix of
night time entertainment,
accessible to all



Confirming our region as
South Yorkshire's premier
night time destination

2012 Doncaster Best Bar

Doncaster BBN Awards

Doncaster Best Bar None



Concluding Comments

- Night time management requires balance
- Now growing body of experience in different geographical regions
- Key points
 - Focus on quality of experiences, creativity - not on GVA or uplift in property prices
 - Context sensitive regulation
 - Diversification of activities and approaches
 - New forms of governance recognising tensions between short term visitors and residents
 - More research on economics, dynamics of gentrification, gender, diversification, social inclusion.

