

FIXING LONDON'S NIGHTLIFE INDUSTRY-LED SOLUTIONS



A REPORT BY EMMA BEST AM

LONDON



CITY HALL
CONSERVATIVES

Fixing London's Nightlife: Industry Led Solutions

Emma Best AM

Foreword



Emma Best AM
Deputy Leader of City Hall
Conservatives

Everyone will have their own experiences of London's rapidly declining nightlife. Those leaving a West End show find every pub or bar nearby closed, late-night food options are increasingly limited and a night-out beyond 12am must be meticulously planned, with the spontaneous nature of hopping from venue to venue harder to achieve. Once renowned across the world, London's nightlife is now in desperate, and urgent, need of help.

Pubs and clubs have closed in London at a faster rate than anywhere else in the country since the pandemic. In that time, other cities across the UK like Manchester and Liverpool have thrived, helping to support local culture, the economy and tourism in those cities.

London's nightlife once catered to all cultures, backgrounds, and every niche interest. Growing up gay in London, my world and confidence in who I was changed when I was able to start experiencing London's nightlife – and at that time there was somewhere to be every night of the week. The Angel in Stratford on a Monday, 1-3-1 on a Tuesday, Brannigans on a Wednesday and Opium in Romford on a

Thursday and G-A-Y and Heaven on a weekend.

It is tragic to think that all are now closed except for Heaven, with an announcement this year that even this historic venue is at risk of closure. It is not just those from the LGBT+ community that are missing out. This decline is not just damaging to the economy, but to the sense of inclusivity that makes London the greatest city in the world.

There are of course many factors that have contributed to London's declining nightlife. The pandemic was evidently devastating for the industry, with more than 3,000 pubs and clubs closing in and around London since March 2020. As the sector started to recover, the economy was quickly hit by high inflation in the wake of Putin's war in Ukraine and then a significant increase in the cost of operating (30-40 per cent for most venues). The knock-on effect was almost immediate – faced with a higher cost of living, many people had to cut back on going out.

We cannot overlook, however, the fact that the number of clubs in London had dropped by 35 per cent even before the start of the pandemic. The decline in night-time venues has been steeper in London than in any other English region. Neither the Mayor, his Deputy Mayor for Culture or his controversial Night Czar seem to have the answers. Fixing London's nightlife is not just about being able to get drunk in Soho at 3am and get home safely (as important as that is). Many livelihoods depend on the sector, supporting hundreds of thousands of workers and small business owners.

As the UK's second city, Manchester is rapidly gaining on the capital with innovative

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interventions and less restrictive licensing – allowing nightlife to flourish. Liverpool has also seen a phenomenal growth post-pandemic in the sector and just this May was named the best city break in the UK, in no small part because of its ‘buzzing’ nightlife.

Young people will simply abandon London for cities like Manchester and Liverpool in the years ahead if we do not act. Footfall in London venues will drop further in turn, leading to more closures and creating a vicious, seemingly inescapable, cycle.

I certainly won't pretend I could fix all of London's night-time economy issues overnight, or that this report delivers immediate resolutions. What I do know, however, is that part of the solution needs to come from the ground up – working with the industry and lobbying the Mayor, local councils and the government for what the sector needs.

That's why I don't want to simply complain about how bad the problem is, I want to be a part of the solution. From venues, to licensing, safety, and transport, this was an honest and frank conversation about what we can do to help, from the people working in the sector who know the problems better than anyone.

Those who have not given up on London's nightlife and believe it can thrive, as it has

done for many decades previously, need our full support now more than ever. For the sake of our city's culture, our economy and all those livelihoods that depend on this sector, fixing London's nightlife is too important an issue not to act.

The recommendations in this report, compiled on a cross-party basis with experts and representatives from the nightlife sector, aim to go some way towards addressing these issues. They encourage the Mayor, the Deputy Mayor for Culture, and the Night Czar to take additional steps to rescue London's nighttime economy.

Emma Best AM is a London-wide Assembly Member first elected in 2021.

Born and raised in Waltham Forest, Emma has lived in north east London all her life. Before the Assembly, Emma worked in children services, helping some of London's most vulnerable children and young people access services and support.

Emma entered politics after experiencing the struggles in London first-hand, sofa surfing, knife crime, and the rising cost of living. She has served as a councillor in Waltham Forest since 2018.

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Michael Kill, Chief Executive Officer Night Time Industries Association

“The challenges faced by London's night-time economy are not just about economics or infrastructure - they're also about having an infrastructure of representation which supports the sector.

“London has an amazingly rich nighttime and culture economy, and it deserves an infrastructure of representation which is unique and encompasses the breadth of culture it represents, especially given its unique size as the capital city.

“It needs to be guided by representation that has first-hand experience of the spectrum of businesses represented within the sector. We need representatives that actively participate in the night-time economy, go out after midnight, see the struggles that businesses, consumers, and the events sector face.

“They would witness the challenges of getting home, the safety concerns, and the vulnerabilities of those out late at night. This understanding is crucial for creating an

effective strategy to build back the capital's night-time economy.

“Moreover, there is a pressing need for a shift in how partnerships are formed and maintained, especially with Policing and local authorities.

“Too often, when situations become difficult, these partnerships turn conditional and enforcement-heavy, rather than collaborative and dialogue-driven. True representation means building an infrastructure that fosters consistent, unconditional partnerships, grounded in a deep understanding of the issues at hand.

“This approach would be transformative for the future of London's night-time economy and the broader industry.”

Michael Kill has been Chief Executive of the NTIA since 2018.

As CEO of the NTIA, Michael has become a national figurehead for the UK's night-time industries, a role that has proven especially significant in the wake of COVID-19.

Throughout this period, he has pushed for recognition and stability for the night-time economy, challenging government policy and lobbying for long term reform while simultaneously supporting businesses.

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Recommendations

Recommendation 1

The Mayor needs to genuinely recognise the scale of the issues facing London's nightlife sector, and then commit to celebrating and actively championing the industry to deliver practical solutions, including support for LGBT+ venues and events.

Recommendation 2

The Mayor should create a £6 million 'Nightlife Prosperity Fund' for boroughs to tell us what they need to make their nightlife thrive, and submit bids to make it happen. Designated Night Time Prosperity Zones in which licensing decisions are taken at pace and in presumption of favour when disputes arise would be created in boroughs wishing to submit bids. Successful bids could include funding for hosting events or improving safety like further CCTV, for example.

Recommendation 3

The Mayor should commit to a true 24-hour transport system for London, initially through the expansion of existing Night Tube services to Thursday nights and extending coverage to the Hammersmith and City Line.

Recommendation 4

Licensing is inconsistent and does not work for businesses or the wider sector. The Mayor should actively lobby local authorities on planning and licensing decisions to support hospitality venues and give them more control over what services they can offer and when.

Recommendation 5

Too many venues need to 'self-police'. The Mayor should work with the Metropolitan Police Service (MPS) and Transport for

London (TfL) to be more proactive on crime, including more CCTV coverage in key locations and increasing police presence in transport and nightlife hotspots.

Recommendation 6

In the Autumn Budget, the Chancellor should introduce a package that reduces costs and increases margins for the sector, such as slashing beer duty, cutting VAT, removing VAT on taxis and private hire vehicles, and offering business rate relief.

Recommendation 7

The Mayor should work with TfL to help Londoners get home safely, by improving mobile charging infrastructure across the TfL estate, such as additional USB charging ports on carriages and in stations, as currently adopted on the London Overground.

Recommendation 8

The Mayor should commission a review of women's safety in the capital at night, to be produced by the Victim's Commissioner. The Commissioner and the Mayor should be held to account on implementing its recommendations.

Recommendation 9

The Mayor and the GLA should champion London's festival sector and actively work with organisers and local communities to support the logistics of events.

Recommendation 10

London's previous Night Czar lost the confidence of the sector and the role should be replaced by a voluntary industry expert, as seen in Greater Manchester or with the Mayor's Health Adviser. The £665,000 salary saving created over 5 years should be ringfenced by the Greater London Authority (GLA) for the new Nightlife Prosperity Fund.

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Contributors

Michael Kill – Night-Time Industries Association

CEO of the NTIA. Mike has become a national figurehead of the UK's nighttime industries. Mike has several decades of experience working within independent, corporate as well as public sector environment at the executive level. Mike specialises in Marketing, Operations, Licensing, Logistics, and System implementation.

Jo May – Soho Business Alliance

Company Secretary at Soho Business Alliance. Acting as a unified voice for all businesses in Soho, with the aim of protecting and growing the economic diversity of the area in Soho.

Stephen Howell – Premium Security

Director at Premium Security. Supplying security guarding and door supervision to elite venues throughout Central London. Steve has extensive board and executive management experience, and is responsible for the company's CSR, Finance, and business development strategies.

Steven Braines – He.She.They

Co-founder of He.She.They. An international electronic record label, fashion label, event series and brand constituency focusing on diversity and inclusion.

Simon Fell – Alexandra Palace & Park

Director of Events, Festivals and Leisure. Responsible for the safe planning of all events within the 10k capacity venue and 196 acre of parkland that holds up to 50k.

Rob Star – Star Pubs

Director of Star Pubs. Set up and developed two iconic London pubs. The Star of Bethnal Green and The Star of Kings. Also, Director at Eastern Electrics, developing London's biggest warehouse promotion into a mini festival brand.

Luke Black – Nightlife Commentator

Luke works as an Assistant Manager in the Private Markets business at the London Stock Exchange and blogs regularly about London's nightlife. Luke is also Chairman of LGBT+ Conservatives, providing an LGBT+ voice within the Conservative party and community.

Emily Fielder – Adam Smith Institute

Director of Communications at the Adam Smith Institute. An independent, non-profit, think tank, working to promote free market ideas through research, publishing, media outreach, and education. Emily previously worked in CCHQ as a Political Advisor and Press Secretary to the Conservative Party Chairman. She started her career in Parliament working for a Minister.



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Participants seated at the conference table include:
- A man in a plaid shirt (left foreground)
- A woman in a dark jacket
- A man in a dark jacket
- A man in a black t-shirt
- A man in a white shirt
- A woman in a patterned top
- A man in a white shirt and tie
- A man in a dark suit
- A man in a dark suit
- A woman in a red top (right end)

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Key Findings

This investigation set out to explore the current state of London's nighttime economy and what action is required to fix it. It offers a series of industry led solutions to the Mayor of London, Night Czar and the Government about what action it can take to rescue it.

As part of the investigation, an informal roundtable discussion was held at City Hall on 25 July 2024 to hear from industry stakeholders and experts about the main challenges faced by various stakeholders associated in and around the night-time economy. This varied from industry figureheads, owners of businesses, think tanks, LGBT+ representatives and nightlife commentators.

Others invited to attend included the Mayor of London, the previous Night Czar and the GLA's Night-Time Team. Unfortunately, a representative was not able to join.

The panel focused on four topics in particular: Economics, Licensing & Planning, Safety and Transport Infrastructure.



Section 1: Economics

London's hospitality sector is in crisis. Sky-high operating costs are going up by as much

as 30-40 per cent, taxes are making it increasingly difficult for pubs and restaurants to do business, and reduced levels of tourism year-on-year are hitting the capital. The result of this? London has the fastest rate of closures for pubs and restaurants in the whole of the UK and workers on the ground are feeling the day-to-day challenges of this.

More than 3,000 pubs and clubs have closed in and around London since March 2020 (Source: NTIA).

"All of our costs have gone sky high – be that staffing, infrastructure, staging or PAs. Our margins are getting much smaller and its crippling." – Simon Fell, Director of Events, Festivals and Leisure, Alexandra Palace & Park

London is finding itself excluded from the national trend of revival and is failing whether other cities are excelling. Often, London's decline in nightlife is excused by national trends – however we've seen Liverpool, Leeds and Manchester all recover strongly and rapidly from COVID-19 with all three cities seeing their overnight transactions not just to return to pre-pandemic rates, but also exceed them.

Liverpool has now overtaken London for its percentage share of overnight transactions (Source: Stripe).

Many of the roundtable attendees did not have confidence in the Mayor's choice of Night Czar or feel that the role was actually delivering for the sector. There was consensus around replacing this position with an industry expert who could encourage buy-in and trust and be a genuine voice for the sector within the Mayor's office and the

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GLA more widely. Rather than simply occupying a symbolic position, any new Night Czar appointed by the Mayor should be actively lobbying for sector support and funding, as well as pushing the Mayor to lobby for changes in national policy.



"It would be nice if the night czar participated in the nighttime economy ... I think we all feel very disconnected, everyone has been so disheartened. I don't know what she does now." – Steven Braines, He.She.They.

Some issues – such as the soaring cost of rent – are beyond the scope of this report and can only be fixed by a more wide-ranging review of the UK's planning system.

Nevertheless, experts want to see the Mayor and any new occupant of the Night Czar role champion the cause of the hospitality sector to support supply-side reforms and pro-growth economic policies, both of which will create favourable conditions for the sector in the long-term.

In the forthcoming Autumn Budget, the Chancellor should consider a package of reforms to support the hospitality sector, including slashing beer duty, introducing a marked reduction in VAT in the hospitality

sector, removing VAT on taxis and private hire vehicles, and offering business rate relief. Whilst this is predominantly national policy, experts want to see the Mayor and the GLA actively lobby the government for these measures and engage with London-based businesses in the run up to budgets, at a time where additional support is needed now more than ever.



"We can talk today about the short-term fixes that would help the hospitality sector, but we have to look at the national picture, and until that's fixed, the hospitality sector is still going to be struggling." – Emily Fielder, Adam Smith Institute

Section 2: Licensing & Planning

Restrictive licensing laws are making it more difficult than ever for our favourite late-night haunts to survive and thrive. Daily, various examples of businesses in London experience difficulties receiving licences due to various red tape and restrictions that are being enforced on them by local councils.

The consensus was that this was a trend across many local authorities in London. The Soho Business Alliance raised an example of

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a bar located in Carnaby Street, which despite being located underground and investing in the appropriate sound-proof infrastructure, was unfortunately denied a licence because of time regulations. The panel also heard that pub owners are increasingly reluctant to talk about problems openly with licensing officers.

Other venue owners agreed there was inconsistency between local authorities and the Mayor of London should be making better representations with local councils to lobby for positive licensing decisions that benefit London's economy.



“Venues are investing hundreds of thousands into building a venue because they get the planning, but they don't get the licence – it's unacceptable.” – Jo May, Soho Business Alliance.

Licensing is becoming more restrictive in London's nightlife hotspots, especially in Hackney (home to Shoreditch), Westminster (home to Soho and the West End) and Wandsworth (home Clapham and Northcote Road). In Hackney, new licences require venues to be closed by 11pm on Friday and Midnight on Saturday.

For existing venues to maintain their license, they must prove that the licence will cause

no negative impacts – something that is almost impossible to do.

In 2022, Wandsworth Council's summer pedestrianisation scheme on Northcote Road saved or created over 120 jobs (Source: Wandsworth Conservatives).

In Westminster, late night levies are used heavily, which makes businesses feel unwelcome. Retailer Greggs notably had to go to court to open late in Leicester Square – a compromise was reached, so they can serve hot drinks and sandwiches – but cannot serve hot food on site. This court case and the subsequent expense occurred was based on a licensing decision that derived from one solitary complaint.

The licencing system as it stands is simply not on the side of businesses or enterprise, creating additional burdens that businesses must navigate through.

Greggs appeals against 24-hour licence rejection (Source: BBC).



“This ‘win’, which still doesn't let Greggs serve hot baked goods, was celebrated by the Night Czar – is this a cause for celebration?” – Luke Black, Nightlife Commentator

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Finally, the panel discussed the need to reinvigorate London's festivals. London's festival scene is struggling to survive. They finish earlier and they are quieter. All Points East, for example, gets yearly complaints about low level noise and faces difficulty with neighbours. Festivals are increasingly held further and further out of the city – The Cause, Ldn East and Fold in Canning Town, for example.



"We've got a real problem just surviving... some of our events we've got to sell more than 90 percent of our tickets just to break even." – Rob Star, Star Pubs.

Section 3: Safety

During the Safety section of the roundtable, the panel unanimously agreed that a lack of policing is one of the biggest problems facing London, with clear implications for the sector.

There was a common perception that door staff are having to deal with most issues firsthand, such as dealing with knives, which

they are not experienced to do so. There was agreement that too many venues were having to 'self-police' to keep themselves and patrons safe, with significant concerns around the absence of police in key nightlife hotspots.



"Our biggest challenge at the moment is crime ... we need more policing in central London." – Stephen Howell, Premium Security

The panel also discussed the need for London to be far safer for women at night, including through the use of women's only spaces. The biggest barrier in place here is the bureaucracy of implementing safe spaces for businesses. The NTIA reiterated that to be a safe space in London, you must pay £90 and always require two females on duty – something that smaller businesses cannot always guarantee.

A survey of 8,000 Londoners found that 74 per cent of female respondents feel worried about their safety some, or even all the time (Source: GLA).

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"Women have been deciding not to apply to, turning down, or leaving a job because they don't feel safe on the way home." – Emily Fielder, Adam Smith Institute

The NTIA also emphasised safety being a key reason why many venues are closing. An important example was G.A.Y announcing they were closing because it no longer felt safe to operate. Among a significant number of venue closures, LGBTQ+ venues have closed at a disproportionate rate, leaving fewer safe LGBTQ+ spaces across London.

LGBTQ+ venues in London have declined by 62% (Source: GLA).

Policing is one of the biggest issues that impact Londoner's safety, not just the numbers, but where they are.



It is not just women's safety that is the sole concern in Sadiq Khan's London. Residents, workers, and visitors are seeing a significant rise in crime many of them are not even aware of – mobile phone snatching.

Incidents are up exponentially. Criminals often use bikes and mopeds to snatch mobile phones, and often victims are approached from behind while talking or texting on phones. 54% of phone snatches involve thieves using pedal bikes.

The Met Police states that 62,896 phones were stolen in the last 12 months to June (Source: Metropolitan Police).

Section 4: Transport Infrastructure

No matter where your night leads, the final, daunting question remains the same: how do I get home?

Since the launch of the Night Tube in August 2016, the service has failed to expand further and still only runs on just 5 out of 11 lines, only two nights a week – and it does not run a Thursday evening, often touted as the 'New Friday' for Londoners to the office for 'core' midweek days post-pandemic.

You only have to look around the streets of Soho, The City and Canary Wharf on Thursday nights to realise just how high footfall is for many workers piling out the office and into the pubs, with many workers then taking advantage of working from home on a Friday. Thursday is the new Friday and there is a case for extending the Night-Tube to exist on a Thursday.

Central London workers on Fridays have fallen by 21 percent, while on Thursdays this has only fallen by 5 percent (Source: Time Out).

Millions of Londoners rely on public transport to get around the city after dark each day, including some of the lowest paid

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and key workers who used night services to get to and from work. But research from London Travel Watch confirmed that for many people, travelling at night-time is a personal security concern, with 73% saying that travelling after 10pm is the least safe time to travel.

Safety late at night is a particular concern amongst women and girls, older and disabled people, and people of colour. New research highlights the importance of maintaining frequent night-time Tubes, trains, and buses as nearly half of women say they avoid travelling at certain times. Having staff at stations also makes people feel safer.

"Communication between TfL, Police, and Licensing would definitely be something [we need]." – Stephen Howell – Premium Security.

A visible police presence at major transport infrastructure during times of high demand, in order to abate public concerns about rising crime, will help keep the public feeling confident on nighttime transport, and we can reap the benefits of London's nightlife without having to head home early.

68 per cent worry about harassment on public transport (Source: GLA).

The imposition of VAT onto private hire vehicles and taxis is also a considerable barrier to wider affordability of using safer methods of transport.

PHVs are now subject to 20% additional VAT, meaning the expense of taking a taxi now is becoming higher, with an average £30 journey now costing £36. Around 300,000 daily taxi and private hire vehicle journeys are taken in London, which represents a key

lifeline to the night-time industries and remotely connected communities, and this VAT would eliminate 5 million journeys.

Sadly, the cost of transport is also going up. About 40 per cent of journeys on London's public transport will be more expensive. It means that Transport for London's income from fares will increase by up to £75 over the next 12 months.

About 40% of journeys on London public transport network to cost more in 2024 (Source: The Standard).

In Conclusion

We should not underestimate the scale of the challenges that face London's hospitality sector and night-time economy. National and local policy decisions have combined to create an unpleasant cocktail of high prices, early closures, and less-than-ideal conditions for a night out on the town.



It is right to acknowledge that a number of these challenges have arisen from the pandemic, growing inflation, and rising costs. We cannot, however, ignore the fact that clubs and pubs in London were closing at a faster rate than anywhere else in the country before the pandemic began.

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The recommendations made in this paper aim to stimulate sustainable growth and recovery for night-time businesses, with a particular focus on the hospitality sector.

Addressing the challenges outlined in this paper is not merely a question of economic recovery – it's about preserving what makes London such an attractive place for young people, tourists, and locals alike.

If we fail to do this, talent will simply leave the capital in search of another city in which they can have a higher quality of life. Manchester and Birmingham are both cities which now rival London on nightlife, quality of life and affordability of housing.

As I alluded to in the opening of this research, no report will transform the sector's fortunes overnight. What I have aimed to do here, however, is bring key

industry figures and stakeholders round the table together to put forward practical, cross-party solutions.

If the sector has any hope of becoming as prosperous as it could be, the Mayor must first confront the reality of the situation London's nightlife faces. The message from the industry on this is clear: there are serious problems within the sector, and it needs decisive action.

Within the recommendations of this report, there are tangible steps that the Mayor, the GLA, national government, TfL and the Met can take to start fixing our city's nightlife.

For the sake of the industry, all of those who depend on it and London's status as a leading capital city, I hope those in power will listen to those in the industry and give London's nightlife what it needs to thrive.

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