

**London's Night-Time Economy**  
Economy, Culture and Skills Committee

**LONDONASSEMBLY**

## Economy, Culture and Skills Committee



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## Foreword



### **Marina Ahmad AM** **Chair of the Economy Committee**

What's your idea of a good night out? Dinner with your partner, then on to a West End show? Dancing all night at a venue so fashionable only cool people can find it? What about a quiet pint in your local pub?

Maybe you took 'Let's Do London' as a challenge and regularly arrive home at dawn the next day? Or are you drawn to late nights at art galleries and bubble tea shops on the high street?

Whatever you want to do, there is something for you in London. The night-time economy is huge, with £136 billion a year being spent nationally. London sees an average of 140,000 visitors out each night in just the city centre from Thursday to Saturday. West End theatre ticket sales alone exceeded £892 million in 2022 and may soon pass a billion pounds a year.

Covid and the cost-of-living crisis have been a blow to the night time industries. Many businesses are now carrying increased debt and some customers found other things to do with their evenings during lockdown. For some, working from home more than they used to means less time spent experiencing London's offer after 6pm. London will always bounce back, whatever the challenge, but these are difficult times for many venues. We heard from venues that the increase in property prices has brought buildings in central London to the attention of developers, especially LGBTQ+ businesses. The unique spaces they offer, with a rich and inclusive culture, are a night out but so much more. We must do more to protect them.

During the pandemic, in some parts of London, residents became used to the quiet and objected to the reopening of venues. The cost-of-living crisis has impacted customers' disposable income, and the cost of utilities and staff have hit venues.

For this investigation, it was important that the Committee heard from a range of stakeholders. Our Committee received evidence from venues, academics, campaigners and those leading policy at the Greater London Authority. We heard about the financial support provided to cultural venues and the work being carried out to keep women safe, and the need for further actions. I have ensured that the evidence presented in this report has been fully considered and placed in context. This is a truly cross-party report, providing a balanced assessment of the current situation and recommendations that can be delivered.

As London's new Nightlife Taskforce begins work, I believe the recommendations in this report will be useful in driving forward our city's success.

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I would like to thank our panellists, those who sent in evidence, Committee Members, our researchers and the GLA Scrutiny Team for the work that went into making this report a success.

## Executive Summary

The Economy, Culture and Skills Committee set out to investigate the state of London's night-time economy, with a particular focus on the night-time leisure sector. This includes pubs, night clubs, restaurants, theatres and music venues. The Committee held two meetings and a call for evidence.

The Committee's first meeting took place on 24 July 2024 and explored the impact of recent economic challenges on London's night-time businesses, as well as night-time licensing in London and the challenges faced by London's LGBTQ+ venues and grassroots music venues. The Committee's second meeting was held on 4 September 2024 and focused on working conditions and pay within London's night-time economy, as well as on discrimination within night-time licensing. As part of this meeting, the Committee also scrutinised the work of the Mayor and the Greater London Authority as it relates to London's night-time economy.

The Committee's call for evidence ran between 22 July and 6 September 2024 and received 11 responses.

The Committee reached several key findings as part of our investigation, which are summarised below:

- The night-time economy is a vital part of London's economic and social fabric. The sector suffered during the pandemic and its recovery has been hindered by the rising cost of doing business, driven by higher staffing costs, energy price rises and debt-servicing expenses.
- Demand in London's night-time economy has decreased. As a result of the cost-of-living crisis, people have less income to spend. In addition to this, the rise of home working has meant office workers are travelling into the city fewer times a week compared to before the pandemic. We heard that this makes it difficult for businesses to raise their prices to compensate for rising costs. Mid-week trade, in particular, has been falling with the rise of flexible working. This was an important source of revenue for night-time businesses, which traditionally relied on income from weekday activity to supplement income generated on the weekend.
- Whilst the Night Tube provides some 24-hour Tube travel in London on the weekend, there are fewer reliable transport options during the week after 11pm. This is striking compared to other major global cities, like Berlin, Tokyo and New York. There is evidence to suggest that a lack of late tube provision depresses footfall and negatively affects perceptions of safety, particularly for women and young people. A stronger evidence base is needed on whether an expansion of the Night Tube would boost footfall in the night-time economy.
- Alcohol and late-night refreshment licensing in London has been described as disjointed by some businesses, many of which find London's licensing landscape difficult to navigate. A common criticism from venues is that licensing authorities have a limited

understanding of the value that the night-time economy provides to London's communities. It was also argued that licensing practice focuses almost exclusively on the prevention of anti-social behaviour and crime, as opposed to promoting the growth of the night-time economy.

- Night-time businesses typically find that there is insufficient integration between licensing and planning at a local level. With support from the GLA, some boroughs are developing their own night-time strategies, linking licensing and planning, which is a step in the right direction. However, many venues would welcome a more joined-up approach across London.
- The number of grassroots music venues (GMVs) in London declined steeply from 2007, although there is some evidence to suggest numbers began to stabilise from 2019. The Committee heard that these venues serve important functions as springboards for up-and-coming musicians to experiment and build up an audience, as well as forming an important part of the night-time economy in their own right. GMVs have traditionally had low profit margins. However, their precarious financial situation is now being exacerbated by customers watching their spending more closely due to cost-of-living pressures.
- Overall demand for live music remains strong in London. Given the role GMVs play in fostering talent, there is a case for distributing the income earned from live music more fairly between large and small venues.
- GMVs typically find that planning policies do not sufficiently take into account the economic and social value they provide, which can lead to conflicts with developers, particularly around issues relating to noise mitigation. The 'Agent of Change' principle, which places the responsibility for mitigating impacts from existing noise-generating activities on developers, has helped resolve some conflicts, but the mechanism for its enforcement is still weak and requires strengthening.
- The number of LGBTQ+ venues in London has also decreased over time, falling by more than half between 2006 and 2017, although the number has since started to stabilise. Many of London's LGBTQ+ venues are threatened by re-development as the sites they occupy have become lucrative for developers.
- Working in the night-time economy is currently not viewed as a stable career path with good career progression, making it difficult to attract applicants. Informal work agreements, underpayment and zero-hours contracts of an exploitative nature are common in the sector. Since Brexit, there is less casual labour available from the EU. Given rising costs, businesses have expressed concerns about increased staffing costs. However, workers in the night-time industry are less likely to be paid the living wage compared to workers in other sectors.
- Despite the appeal of London's nightlife, it is clear from the evidence received by the Committee that many individuals and organisations do not feel it is as vibrant or successful as it could be since the pandemic. It is vital that the Mayor and the GLA continue to work closely with partners to further the success of London's night-time economy in the years to come.

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## Recommendations

### Recommendation 1

The Mayor's new Growth Plan is a welcome opportunity to recognise the importance of the night-time economy in London, and should include specific measures targeted at ensuring the success of London's night-time economy.

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### Recommendation 2

Once the Mayor's Growth Plan has been published, the Deputy Mayor should hold a roundtable with night-time economy businesses to discuss and agree actions on how the Plan can support the growth of London's night-time industries.

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### Recommendation 3

The Mayor should initiate a new round of funding for the Night Time Enterprise Zones.

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### Recommendation 4

The Mayor should carry out a review of how Londoners use night time transport to establish what tube, bus and other networks can be improved.

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### Recommendation 5

The Mayor should instruct TfL to carry out an impact assessment and review existing night tube provision since 2016. This should assess the practicability, benefits or difficulties of expanding the night tube. It should also quantify the impact of extended operating hours on night-time footfall and spending, any as well as on TfL's revenue and expenditure. The impact assessment should start by the end of 2025.

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### Recommendation 6

The Mayor should use regular engagement sessions, such as the Night Time Borough Champions Network and the Night-Time Strategy Masterclass Sessions, to develop and share best practice and encourage local authorities to take a more consistent approach to licensing.

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### Recommendation 7

The Mayor should review the impact that London's current licensing regime has on the success of the night-time economy and, working with boroughs, take steps to strengthen this regime. This could include setting up a pan-London register of relevant licensing applications.

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### Recommendation 8

Given one of the stated aims of the Business Friendly Licensing and Regulation Fund was to trial new licensing practices which could be adopted by other London boroughs, the Mayor should identify successful approaches and encourage their adoption across London.

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### Recommendation 9

As part of his engagement with the Government over planning reform, the Deputy Mayor for Business and Growth should explicitly raise the importance of protecting night-time venues particularly at risk in London, such as LGBTQ+ venues and other cultural spaces. He should report back to the Committee on the outcome of these discussions.

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### Recommendation 10

The GLA should encourage boroughs to incorporate the Agent of Change principle into their night-time strategies.

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### Recommendation 11

The Mayor should lobby the Government to put the Agent of Change principle on a statutory footing.

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### Recommendation 12

The Mayor should advocate for London's live music industry to introduce a voluntary levy on arena and stadium tickets to support grassroots music venues in London

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### Recommendation 13

The Mayor should ensure that grassroots music venues are able to access financial support through his new proposed 'Nightlife Fund', along similar lines to the Culture at Risk Fund which operated during the pandemic.

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### Recommendation 14

The Mayor should work with people with lived experience of disability to produce a guidance document for music venues in London to help them make their spaces more accessible.

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### Recommendation 15

MOPAC and the Metropolitan Police Service should engage constructively with the upcoming report from Black Lives in Music and provide a quick response to its findings.

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### **Recommendation 16**

**The Mayor should work with London Councils to promote best practice in licensing. This should include adding the Ask for Angela scheme to venues licensing conditions, so that operation of the scheme becomes enforceable as part of routine licensing visits.**

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### **Recommendation 17**

**The Mayor should develop a code of practice for organisations in the entertainment sector in London who employ freelancers, to ensure better pay and conditions for these workers, along similar lines to the Good Work Standard.**

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### **Recommendation 18**

**The Mayor, the Night Time Industries Association and other industry bodies should promote the Good Work Standard to night-time economy businesses.**

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## Introduction

### The significance of London's night-time economy

London's night-time economy forms a crucial part of the city's economy, contributing billions of pounds and supporting hundreds of thousands of jobs.<sup>1</sup> It enhances London's appeal, attracting both locals and tourists to music venues, theatres, restaurants and bars. Although sectors associated with the night-time economy were disproportionately affected by the COVID-19 pandemic, evidence heard by the Committee suggests that demand in parts of the night-time economy is showing strong signs of recovery.

#### How do we define the night-time economy?

Within the context of this report, the "night-time economy" refers to businesses which are primarily driven by trade occurring between 6pm and 6am and operate within the "out-of-home leisure market". This includes pubs, nightclubs, restaurants, theatres and music venues. This is consistent with the definition used by the Night Time Industries Association (NTIA) in its annual reports on the night-time economy. The Night Time Industries Association states that in 2022, this part of the economy generated consumer spending worth £136.5 billion and employed approximately two million people across the UK.<sup>2</sup>

Guests at the Committee's meetings told us that Londoners are keen to go out again and enjoy the city's night-time offer, in part because they were not able to during the pandemic. According to MasterCard spend data, one in every four pounds in London is spent between 6am and 6pm.<sup>3</sup> We also heard that music tourism has been on the rise, as London saw nearly seven million music tourists in 2023, showing that the capital's night life is an important draw for visitors from the UK and abroad.<sup>4</sup>

London's night-time activity is heavily concentrated in central London, with the West End being by far the most popular destination in London, as well as in the UK as a whole. The area sees more than 140,000 visitors on a typical Thursday to Saturday night, more than four times as many as the second-busiest destination, Covent Garden.<sup>5</sup>

<sup>1</sup> London First, [London's 24 Hour Economy](#), May 2018

<sup>2</sup> Night Time Industries Association [Night Time Economy Report 2024](#), (pp.6, 17)

<sup>3</sup> GLA Economics, [London at Night: An Updated Evidence Base for a 24 Hour City](#), March 2024 (p.4)

<sup>4</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.3)

<sup>5</sup> GLA Economics, [London at Night: An Updated Evidence Base for a 24 Hour City](#), March 2024 (p.60, Figure 47)

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“People still want to go out and enjoy culture again, probably more so now, because they were forced not to for a long period of time.”<sup>6</sup>

**Simon Tracey, Group Chief Executive  
Broadwick Group**

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At its first meeting, the Committee heard from Joan Moynihan, Executive Director of Nimax Theatres, which owns six historic theatres in the West End. She noted that the theatre sector plays a vital role in attracting visitors and boosting London's local economy: on average, 30,000 people a night see a West End show, with 70 per cent of those eating out and 15 per cent paying for accommodation. Joan Moynihan referred to research which showed that, for every £1 spent in the theatre sector, £1.40 is spent in the local economy.<sup>7 8</sup>

A number of our guests also stressed that much of the value provided by the night-time economy cannot be captured in numbers alone. Night-time venues generate value that is harder to quantify by serving as places of belonging for diverse groups and springboards for local talent. For example, London is home to a multitude of diverse LGBTQ+ groups, and the capital's LGBTQ+ venues provide important focal points for communities to gather, as well as for up-and-coming artists to hone their craft. We heard about the importance of London's grassroots music venues, and live music events more generally, in helping artists to build up a following and kick-start their careers.

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“You know what it is like to go to a live event, it is so special, there is nothing like it. Like I always say, it would send a person, an audience member, from indifference to an expert fan instantly on an amazing performance.”<sup>9</sup>

**Dr Charisse Beaumont, Co-Founder and Chief Executive  
Black Lives in Music**

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## **The effects of the pandemic**

The COVID-19 pandemic had a significant and disproportionate impact on the night-time economy. Footfall in London decreased substantially, dropping by more than 90 per cent in Central London at the beginning of the pandemic.<sup>10</sup> Footfall levels remained depressed throughout 2021, particularly for retail and recreation. Data shows that when the Government lifted all restrictions in July 2021, footfall relating to retail and recreation was still 34 per cent

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<sup>6</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.2)

<sup>7</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.2)

<sup>8</sup> Sound Diplomacy, [Economic Assessment of the UK Theatre Sector](#), June 2023 (p.44)

<sup>9</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.9)

<sup>10</sup> London Assembly, [MQT2020/3007](#)

below pre-pandemic levels on average.<sup>11</sup> Overall, night-time footfall remained volatile until 2022, when signs of a sustained recovery began to emerge.<sup>12 13</sup>

Consumer spending closely mirrored footfall, experiencing a sharp drop at the beginning of the pandemic in 2020.<sup>14</sup> Consumer spending in the night-time economy remained depressed after restrictions were lifted: 2021 saw a 46 per cent drop in consumer spend compared to 2019 levels.<sup>15</sup> Nightclubs in particular continued to see low attendance, with venues reporting having had to cancel events. Many operators blamed this on “low consumer confidence” and unclear messaging from the Government around pandemic restrictions.<sup>16</sup>

Joan Moynihan from Nimax Theatres told the Committee that the theatre sector was hit particularly hard by the pandemic, with theatres having to close completely for extended periods of time.<sup>17</sup> According to an economic impact assessment by Sound Diplomacy, a consultancy, total annual ticket spending decreased by 78 per cent in between 2019 and 2020.<sup>18</sup> Only 12 per cent of theatres received direct subsidies during the pandemic.<sup>19</sup>

The previous Government also introduced a range of financial support for businesses and employees during the pandemic, including the Coronavirus Job Retention “furlough” Scheme, which provided grants to employers enabling the retention of staff.<sup>20</sup> However, some of our guests indicated that this government support was not always appropriately targeted and failed to take into account the varied nature of the businesses operating within the night-time economy in London. Michael Kill, Chief Executive of the Night Time Industries Association, described the Government’s approach as a “broad brush hospitality approach”, which did not take into account the different challenges and cost bases of different types of venues. He added that this led to nightclubs being funded at the same rate as pubs, although the former have traditionally had much higher costs.<sup>21</sup>

Dugald Johnson, Policy Officer at Equity, a trade union representing performers and other entertainment professionals, told us that the pandemic had an “enormous impact” on workers in the night-time economy in London. He said the majority of Equity’s members had most of their work cancelled.<sup>22</sup> He also noted that 40 per cent of Equity’s members could not access the Self Employment Income Support Scheme (SEISS), despite mostly being self-employed.<sup>23</sup> This

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<sup>11</sup> Central London Forward, [Central London Recovery Tracker - July 2021](#)

<sup>12</sup> Centre for Cities, [High Streets Recovery Tracker](#), January 2023

<sup>13</sup> GLA Economics, [London at Night: An Updated Evidence Base for a 24 Hour City](#), March 2024 (p.57)

<sup>14</sup> Night Time Industries Association, [Night Time Economy Report 2024](#) (p.13)

<sup>15</sup> Night Time Industries Association, [Night Time Economy Report 2023](#)

<sup>16</sup> The Guardian, [Clubbers shun reopened venues in England amid confusion over Covid safety](#), 31 July 2021

<sup>17</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.2)

<sup>18</sup> Sound Diplomacy, [Economic Assessment of the UK Theatre Sector](#), June 2023 (p.13)

<sup>19</sup> London loves Business, [The role of theatre in boosting London’s tourism economy](#), 17 August 2023

<sup>20</sup> House of Commons Library, [Public spending during the Covid-19 pandemic](#), September 2023

<sup>21</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.15)

<sup>22</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London’s Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.14)

<sup>23</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London’s Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.14)

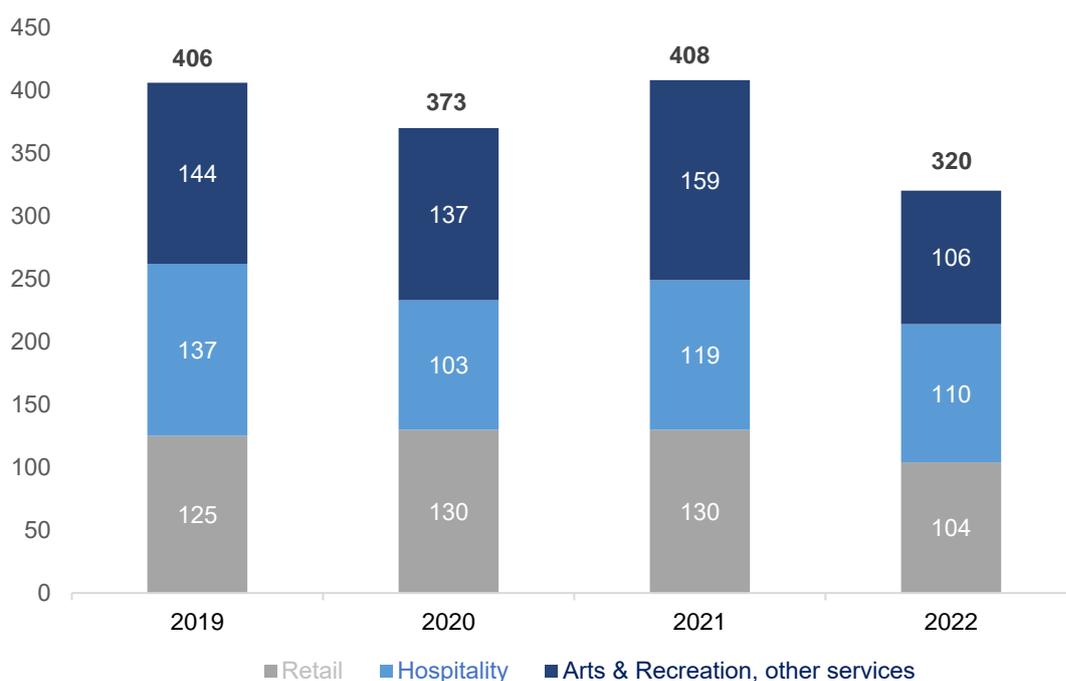
was echoed by Joan Moynihan, who told us that many of Nimax’s workers are freelancers who were not eligible for the furlough scheme and struggled to access SEISS.<sup>24</sup>

There is also evidence to suggest the furlough scheme did not prevent businesses from making staff redundant.<sup>25</sup> A 2021 report by the All Party Parliamentary Group for the Night Time Economy found that the furlough scheme did not completely prevent redundancies, with nightclub workers having been the group most heavily affected by lay-offs among night-time workers. According to the report, night-time economy businesses, on average, made 37 per cent of their total workforce redundant in 2020.<sup>26</sup>

The Labour Force Survey data shows that the number of London’s evening and night-time leisure workers decreased rapidly between 2021 and 2022. This drop coincided with the end of the “furlough” scheme, which concluded on 30 September 2021.<sup>27</sup>

**Figure One: Number of evening and night-time workers in London (thousands) by sector**

The number of evening and night-time workers dropped by 22 per cent between 2021 and 2022



Source: ONS, Labour Force Survey (LFS), accessed via [London Datastore](#)

<sup>24</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.2)

<sup>25</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.15)

<sup>26</sup> All-Party Parliamentary Group for the Night Time Economy, [COVID-19 and UK Nightlife](#), February 2021 (p.3)

<sup>27</sup> Calculations by London Assembly Economy, Culture and Skills Committee, based on Office for National Statistics, [Labour Force Survey data 2015 to 2022, January 2023](#) [accessed via London Datastore]

During the pandemic, the GLA made available £2.3 million through the Culture at Risk Fund to support cultural venues at risk of falling into administration.<sup>28</sup> The GLA provided grants for 134 cultural organisations, including 20 grassroots music venues and 11 LGBTQ+ venues.<sup>29</sup> The Mayor stated that the majority of recipients were unable to benefit from government schemes or funding from Arts Council England.<sup>30</sup> Shonagh Manson, Assistant Director of Culture, Creative Industries and 24-Hour London at the GLA, told the Committee that the GLA continues to provide one-to-one support for night-time businesses facing difficulties or at risk of closure.<sup>31</sup>

## The role of the GLA

The Mayor first stated in July 2017 that he wanted to London be a “leading 24-hour global city.”<sup>32</sup> This was accompanied by a strategy document, which set out ten principles to achieve this vision and “pave the way for the capital to become a trailblazing city at night, competing with the likes of Berlin, Tokyo and New York.”<sup>33</sup>

The Mayor appointed London's first “Night Czar” in 2016, tasked with championing London's nightlife. In 2017, she began overseeing the Mayor's ‘24-Hour London Programme’, which includes a range of initiatives with the goal to put the Mayor's vision for London as a leading 24-Hour city in action.

In addition to leading on the Mayor's 24-Hour London Programme, the Night Czar ran “Night Surgeries”, which were organised in partnership with local authorities. These included visits to meet resident and community groups, as well as businesses, councillors, night workers and volunteers. The stated aim of these sessions was for the Night Czar and her team to “hear directly from Londoners about their experience of the capital at night”.<sup>34</sup> Since October 2024, the post of the Night Czar has been vacant.

We are aware of criticism of the Mayor and the Night Czar from some stakeholders. Press criticism has often focused on questions over the pay and impact of the Night Czar role.<sup>35</sup> In March 2024, Michael Kill criticised the Mayor following a post on social media platform X (formerly Twitter). In the post, the Mayor said that “London is leading the world in its 24-hour policy, with other global cities looking to us for inspiration.”<sup>36</sup> Following this, Michael Kill told the Guardian he could not understand the basis for the comments and that there was “a real disparity with the narrative presented and the PR position [...] and the reality of what was

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<sup>28</sup> London Assembly, [MQT 2020/2725: Culture at Risk Fund](#), 17 September 2020

<sup>29</sup> London Assembly, [MQT 2023/0605: Culture at Risk Fund \(2\)](#), 23 February 2023

<sup>30</sup> London Assembly, [MQT 2023/0605: Culture at Risk Fund \(2\)](#), 23 February 2023

<sup>31</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.2)

<sup>32</sup> Mayor of London, [24 Hour London](#)

<sup>33</sup> Mayor of London, [Mayor unveils first ever 24-hour vision for London](#)

<sup>34</sup> Mayor of London, [Night Surgeries](#)

<sup>35</sup> The Times, [London's globetrotting 'night tsar' adds fuel to criticism of Sadiq Khan's spending](#), 25 February 2024; LBC, [Sadiq Khan's 'night czar' Amy Lamé to stand down after criticism of London's faltering nightlife](#), 2 October

<sup>36</sup> [Sadiq Khan via X](#), 3 March 2024

going on within the city".<sup>37</sup> This was raised at the Committee's first meeting. Michael Kill reiterated to the Committee that he disagreed with the statement, pointing out a "disconnect between what was happening on the ground and what was being said in the mayoral office."<sup>38</sup> He argued that, unlike cities such as Manchester and Bristol, London lacked a coordinated approach and a "clear narrative" to unite key stakeholders like TfL, the Mayor's Office, and businesses."<sup>39</sup>

However, during this investigation, we also received positive evidence about the role of the Mayor and the Night Czar. The Music Venue Trust (MVT) argued that the Night Czar's role should be expanded. Sophie Brownlee, External Affairs Manager at the MVT, stated that the MVT "fully support the role of the Night Czar", adding that the Night Czar and GLA should have more powers. She said that this could include more budgetary powers, the power to summon people to meetings, as well as the power to lift parking restrictions so musicians can unload to venues.<sup>40</sup>

Guests also recognised the "soft power" of the Night Czar. This has included supporting some venues to avoid closing down in the face of licensing disputes and redevelopment proposals. Cllr. Sabrina Francis, Camden Council's Cabinet Member for Jobs, Young People and Culture, stated that it has been useful to have the Night Czar present at campaigns to save night time venues from closing down to "get eyeballs on the campaign and get names on petitions".<sup>41</sup> Similarly, Prof. Ben Campkin, Professor of Urbanism and Urban History at UCL, stated that the Night Czar and 24-Hour Team "have been incredibly helpful in producing better outcomes from some difficult [planning] contestations."<sup>42</sup>

The Mayor has claimed that the Night Czar was instrumental in the re-opening of the London night club Fabric, which had its license revoked by Islington Council in 2016 after the drug-related deaths of two teenagers.<sup>43</sup> The Night Czar met with the Metropolitan Police, Islington Council and the club owners to agree to new licensing conditions which led to the club re-opening.<sup>44</sup>

Nonetheless, despite the appeal of London's nightlife, it is clear from the evidence received by the Committee that many individuals and organisations do not feel it is as vibrant or successful

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<sup>37</sup> The Guardian, [Critics call time on 24-hour city claims by London mayor's office](#), 11 March 2024

<sup>38</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.18)

<sup>39</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.13)

<sup>40</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.3)

<sup>41</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.6)

<sup>42</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.4)

<sup>43</sup> The Guardian, [London nightclub Fabric to close permanently after license is revoked](#), 7 September 2016

<sup>44</sup> The Standard, [Fabric London: Sadiq Khan hails his new Night Czar Amy Lamé after deal struck to reopen superclub](#), 22 November 2016

as it could be since the pandemic.<sup>45</sup> When asked at the Committee's first meeting whether they believed London was what they considered to be a "24-hour city", all four panel members concurred that this was not the case. Simon Tracey, Group Chief Executive Officer at Broadwick Live added that he believed the Night Czar had a "genuine aspiration" for London to become a 24-hour city but was not funded sufficiently to have an impact.<sup>46</sup>

In his 2024 manifesto, Sadiq Khan pledged to convene a London Nightlife Taskforce and launch a London Nightlife Fund.<sup>47</sup> Paul Broadhurst, the GLA's 24-Hour London Manager, informed the Committee in September 2024 that these policies were still in development and that further details would be shared with the Committee once they become available, but did not specify when he would provide this information. On 4 February 2025, the Mayor launched the London Nightlife Taskforce, which is made up of key stakeholders from the sector.<sup>48</sup> The Taskforce is expected to "assess the challenges and opportunities" facing London's nightlife over a six month period and provide recommendations to the Mayor.<sup>49</sup> It is vital that the Mayor and the GLA continue to work closely with partners, including on the Nightlife Taskforce, to further the success of London's night-time economy in the years to come.

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<sup>45</sup> See for example: London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (pp.4, 18); Written evidence submitted to the Economy, Culture and Skills Committee by the Royal Vauxhall Tavern. Published alongside report.

<sup>46</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.17)

<sup>47</sup> Sadiq Khan, [A Fairer, Safer, Greener London for everyone](#)

<sup>48</sup> Mayor of London, [Mayor launches independent new Nightlife Taskforce to help support capital's life at night](#), 4 February 2025

<sup>49</sup> Mayor of London, [Mayor launches independent new Nightlife Taskforce to help support capital's life at night](#), 4 February 2025

## The key challenges for night-time businesses

### The rising costs of doing business

Although night-time consumer spending has begun to rise again following the pandemic, businesses in London's night-time economy continue to face challenges which are hindering the sector's recovery from the significant drop in footfall and spending experienced during the pandemic. Consumer spending in the UK night-time economy increased by 42.5 per cent in 2022, from £95.7 billion in 2021 to £136.5 billion in 2022.<sup>50</sup> However, when taking into account pre-pandemic spending and factoring in inflation, the night-time-economy grew by just 0.6 per cent between 2018 and 2022.<sup>51</sup>

Guests at the Committee's meetings and written evidence stressed that rising energy prices have had a significant impact on night-time economy businesses. In its written evidence, the Society of London Theatre & UK Theatre (SOLT & UK Theatre) stated that the theatre sector saw, on average, a 120 per cent increase in utility bills.<sup>52</sup> This was echoed by Joan Moynihan from Nimax Theatres, who told the Committee that Nimax's own energy bills had increased by "up to 300 per cent" at their peak.<sup>53</sup>

The Committee heard that businesses' payroll costs have also gone up compared to before the pandemic. Guests told the Committee that this is largely due to workers having left the sector during the pandemic to find employment in other industries. There was overwhelming agreement among guests representing night-time businesses that there was a "skills shortage". Mark Williams, Deputy Chief Executive of the Heart of London Business Alliance (HOLBA), a business improvement district representing businesses in the West End, told the Committee:

*"We have a skills shortage, it is a constant issue [...] It is a big challenge for our businesses, and it is something we cannot replace in a local way."*<sup>54</sup>

Simon Tracey from Broadwick Live told the Committee that as a result of the current skills shortage, businesses have to pay a "premium" to attract staff.<sup>55</sup> This was also echoed in the submissions to the Committee's call for evidence, which stressed that staffing costs had

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<sup>50</sup> Night Time Industries Association, [Night Time Economy Report 2024](#) (p.13)

<sup>51</sup> Night Time Industries Association, [Night Time Economy Report 2024](#) (p.15)

<sup>52</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Society of London Theatre & UK Theatre (SOLT & UK Theatre). Published alongside report.

<sup>53</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.3)

<sup>54</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.8)

<sup>55</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.3)

increased substantially. Joan Moynihan also said that Brexit had made it more difficult to attract staff from abroad to fill vacancies in the theatre sector.<sup>56</sup>

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*"We lost freelancers during the pandemic and post-Brexit to other countries and to other industries and they are not coming back."*<sup>57</sup>

### **Joan Moynihan, Executive Director Nimax Theatres**

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We heard evidence that higher energy and staffing costs are unlikely to be short-term in nature and that businesses will have to adapt to a rising cost base. Michael Kill told the Committee that:

*"The challenge we have at the moment is we are looking at moving into a very, very different cost-based model for our industry, and, with that, we are going to have to consider that some of these businesses are not going to survive sadly."*<sup>58</sup>

This was strongly echoed by the responses received to our call for evidence. For example, the Royal Albert Hall, one of London's oldest and largest concert venues, stated that their overall cost base had increased primarily due to salary and energy price increases.<sup>59</sup>

Price increases have affected the night-time economy more broadly. A survey published by the NTIA in 2023 revealed that seven out of ten businesses in the sector are barely breaking even with half doubting they will survive into 2025.<sup>60</sup> In its written evidence, UKHospitality, a trade association, stated:

*"Costs are estimated to have risen for the sector substantially higher than the rate of CPI [consumer price index] so the level of profitability in the sector will have fallen substantially"*<sup>61</sup>

We heard evidence suggesting that many of the night-time businesses that survived through the pandemic managed to do so by taking on debt to cover ongoing costs, such as rent, or by agreeing breaks in their rental payments. Cllr Sabrina Francis told the Committee that many night-time businesses in Camden agreed to defer rental payments for the duration of the pandemic but were now faced with large repayments. We heard that this was particularly

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<sup>56</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.3)

<sup>57</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.2)

<sup>58</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.6)

<sup>59</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Royal Albert Hall. Published alongside report.

<sup>60</sup> Night Time Industries Association, [NTIA Fear One in Four Independent Night Time Economy Businesses at Risk](#)

<sup>61</sup> Written evidence submitted to the Economy, Culture and Skills Committee by UKHospitality. Published alongside report.

difficult for smaller venues.<sup>62</sup> Michael Kill told the Committee the pandemic had left a “legacy of debt” in the sector.<sup>63</sup>

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“It was some of our smaller pubs that were granted breaks in their rental [agreements] and now suddenly they have to pay it all back and they are finding it hard.”<sup>64</sup>

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### **CLlr Sabrina Francis, Cabinet Member for Jobs, Young People and Culture Camden Council**

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Guests also shared concerns with the Committee regarding the planned withdrawal of business rates relief introduced during the pandemic, which could exacerbate the financial difficulties. Deputy Mayor for Business and Growth, Howard Dawber, described the withdrawal of business rate support as a “cliff edge”, which businesses may find difficult to navigate given their cost base had increased.<sup>65</sup> In the Autumn Budget on 30 October 2024, the Chancellor announced that the Government would extend business rates relief for the retail, hospitality and leisure sectors in 2025/26, but reduce the rate of relief from 75 per cent to 40 per cent.<sup>66</sup>

Industry groups, such as the NTIA and UKHospitality, commented on the Budget and argued that any reduction in business rates would be negated by other changes introduced in the Budget. This includes an increase in the rate of National Insurance Contributions, a reduction in the threshold at which employers must pay National Insurance, as well as an increase in alcohol duty.<sup>67</sup> In a press statement, Michael Kill called the relief a “minor concession”.<sup>68</sup>

We heard that concerns around business rates are particularly acute for hospitality businesses due to the way business rates are currently calculated. Businesses are currently based on a property’s “rateable value”, which is an estimate by the Valuation Office Agency of how much it would cost to rent a property for a year on 1 April 2021. In its submission to the Committee’s call for evidence, UKHospitality stated that hospitality businesses tend to be property-intensive and thus have high “rateable values”.<sup>69</sup>

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<sup>62</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.4)

<sup>63</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.1)

<sup>64</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.4)

<sup>65</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London’s Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.5)

<sup>66</sup> Ministry of Housing, Communities and Local Government, [Business Rates Relief: 2025/26 Retail, Hospitality and Leisure Scheme](#), 16 January 2025

<sup>67</sup> The rate at which employers pay National Insurance Contributions will increase from 13.8 per cent to 15 per cent whilst the threshold at which employers must pay National Insurance on their employees’ earnings will be reduced from £9,100 to £5,000. Alcohol duty on non-draught products will increase in line with the Retail Price Index

<sup>68</sup> Night Time Industries Association, [NTIA Criticises Autumn Budget: Insufficient Relief for Struggling Nightlife Sector](#), November 2024

<sup>69</sup> Written evidence submitted to the Economy, Culture and Skills Committee by UKHospitality. Published alongside report.

We note the Government's manifesto commitment to "replace the business rates system with a new system that will level the playing field between the high street and online giants."<sup>70</sup> In October 2024, the Government published a 'discussion paper' setting out its priority areas for reform of the business rates system.<sup>71</sup>

The Mayor has been consulting on his upcoming London Growth Plan. One of the stated aims of this Plan is to drive "inclusive economic growth" in the capital. The Mayor has stated that this Plan is being developed in partnership in collaboration with boroughs, businesses, trade unions, skills providers and civil society.<sup>72</sup> Given the challenges businesses are currently facing, the timing of the Growth Plan presents an opportunity to outline a positive vision and support measures for London's night-time economy.

While the night-time economy has shown some signs of recovery since the pandemic, businesses continue to face significant financial challenges. The Mayor's upcoming London Growth Plan presents a timely opportunity to address these challenges. As outlined above, by extending business rate relief for hospitality, retail and leisure businesses, the Government has already taken a positive step to support London's night-time economy. Notwithstanding this, and in line with the Government's manifesto commitments, a more fundamental reform of the business rate system is needed to ensure that property-intensive businesses in prime locations are not unfairly penalised.

## Recommendation 1

**The Mayor's new Growth Plan is a welcome opportunity to recognise the importance of the night-time economy in London, and should include specific measures targeted at ensuring the success of London's night-time economy.**

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## Recommendation 2

**Once the Mayor's Growth Plan has been published, the Deputy Mayor should hold a roundtable with night-time economy businesses to discuss and agree actions on how the Plan can support the growth of London's night-time industries.**

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## Cost-of-living pressures and changing consumer preferences

Evidence received by the Committee suggests that the cost-of-living crisis has had a considerable impact on the night-time economy. Guests told us that cost-of-living pressures in the wider economy have depressed demand as people spend and go out less. Simon Tracey told the Committee that this has resulted in a reduced amount of spend per person.<sup>73</sup> Michael Kill

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<sup>70</sup> The Labour Party, [Labour plan for small businesses will pull up the shutters for Britain's entrepreneurs](#), 8 June 2024

<sup>71</sup> HM Treasury, [Transforming business rates](#), 30 October 2024

<sup>72</sup> Mayor of London, [London Growth Plan](#)

<sup>73</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.3)

stated that it impacted three variables important to the profitability of night-time venues: 'dwell time' (time spent in a venue), spend and frequency of visit.<sup>74</sup>

The December 2023 REKOM night index, which tracks consumer behaviour in the UK's night-time economy sector, found that the number of respondents that go out at least once a week is currently at 58 per cent, which is a decrease of 8.9 per cent since July 2023.<sup>75</sup> The index also suggests that people are spending less and purchase soft drinks instead of alcohol with 45.9 per cent of respondents saying they regularly go out without drinking alcohol.<sup>76</sup>

We also heard evidence that there has been a sharp drop in mid-week trade in London, coinciding with the rise of flexible working and fewer people socialising in the city after work. We heard that this had a significant impact on businesses' profitability as trade during the week has traditionally played an important role in generating additional income. Simon Tracey told the Committee:

*"The days where you could just build a nightclub, open up your doors and everyone would turn up for a midweek, Thursday, Tuesday, come on a Friday a bit later, that industry is not here anymore"*<sup>77</sup>

In 2024, The Mayor and TfL introduced a trial scheme where all Tube and rail fares on Fridays were charged at off-peak rates.<sup>78</sup> The scheme ran from 8 March until 31 May 2024, and cost £24 million.<sup>79</sup> An evaluation of the trial found that "there was no noticeable difference in the number of pay as you go journeys made at peak times during the trial compared to pre-trial."<sup>80</sup>

We heard that although there has been a drop in mid-week trade, footfall and spending on Thursday have made a comparatively strong recovery. Paul Broadhurst, the GLA's 24-Hour London Manager, told us that, in central London, Thursday was now a "really important night in terms of footfall and spend", but added that the "jury was still out" on whether Thursday was the "new Friday".<sup>81</sup> Evidence heard by the Committee indicates that levels of footfall and spending on Thursdays are significantly lower than levels seen on Fridays before the pandemic. In their joint submission to the Committee's call for evidence, South Bank Employers' Group (SBEG) and South Bank Business Improvement District (BID) expressed pessimism, citing a business representative who stated that:

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<sup>74</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.4)

<sup>75</sup> Foodservice news, [REKOM UK identifies the changing consumer behaviours that are re-defining the UK's late-night sector](#), 22 December 2023

<sup>76</sup> Foodservice news, [REKOM UK identifies the changing consumer behaviours that are re-defining the UK's late-night sector](#), 22 December 2023

<sup>77</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.15)

<sup>78</sup> TfL, [Mayor confirms landmark off-peak Fridays trial to start on 8 March](#), 1 March 2024

<sup>79</sup> Mayor of London, [MD3247 Off-peak Friday fares trial](#), 11 March 2024

<sup>80</sup> BBC News, [Off-peak Fridays trial made no difference - TfL](#), 8 January 2025

<sup>81</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.17)

*"If only Thursday was the new Friday [...] there are not enough people in the office on Thursday to replace Friday and make a material impact".<sup>82</sup>*

Guests told us that suppressed demand coinciding with rising costs made it difficult to pass on a portion of cost increases to consumers by putting up prices accordingly. We heard that this posed a threat to venues' profit margins and hampered further investment. In its written evidence, SOLT & UK Theatre stated that despite the theatre sector seeing a rise in costs, little of this has been passed on to audiences, with the average ticket prices rising by half the rate of inflation since before the pandemic.<sup>83</sup> This was echoed by the submission from the SBEG to the Committee's call for evidence, which stated that sales reductions in combination with cost increases "wipes out any profit and leaves nothing for business investment".<sup>84</sup> Michael Kill described the current situation as "almost the perfect storm".<sup>85</sup>

*"Costs have significantly gone up for all of our businesses in the West End and there are pressures to keep the pricing low, therefore there is a massive threat in terms of the ability to generate revenue"<sup>86</sup>*

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### **Mark Williams, Deputy Chief Executive Heart of London Business Alliance**

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There is some evidence to suggest that venues with an offering that is less centred around alcohol consumption have fared better than their competitors which focus primarily on drinking. Night markets and street food venues, which are not necessarily dependent upon alcohol sales, have expanded with their numbers estimated to have increased from five in 2012 to 110 in 2023 across the UK.<sup>87</sup> Similarly, in recent years food-led pubs have shown more resilience, as opposed to traditional high-street pubs.<sup>88</sup>

### **Night time enterprise zones**

In 2022, the GLA made funding available via two programmes to support the night-time economy directly through the Night Time Enterprise Zones programme. Guests from the GLA told the Committee that the programme, which operated in Bromley Town Centre, Vauxhall and Woolwich between 2022 and 2023, had been successful in raising consumer spending. Shonagh Manson, referring to GLA programme evaluation data, told the Committee that across the Zones, overall local spending was boosted by up to 70 per cent between 6pm and 9pm,

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<sup>82</sup> Written evidence submitted to the Economy, Culture and Skills Committee by South Bank Employers' Group and South Bank Business Improvement District Published alongside report.

<sup>83</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Society of London Theatre & UK Theatre (SOLT & UK Theatre). Published alongside report.

<sup>84</sup> Written evidence submitted to the Economy, Culture and Skills Committee by South Bank Employers' Group and South Bank Business Improvement District Published alongside report.

<sup>85</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.1)

<sup>86</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.4)

<sup>87</sup> Night Time Industries Association, [Night Time Economy Report 2024 \(p.37\)](#)

<sup>88</sup> Night Time Industries Association, [Night Time Economy Report 2024 \(p.30\)](#)

compared to the same dates in the previous year.<sup>89</sup> The evaluation data further shows that 65 businesses extended their opening hours and over 69 per cent of people surveyed said they felt safer and more positive about their area.<sup>90</sup>

Paul Broadhurst told the Committee that the Night Time Enterprise Zones had been a “great success” and that boroughs were continuing some of this work themselves despite the GLA’s funding for the programme running out in 2023. He added:

*“What has been really interesting is they have created late brands for each of these areas. You have Vauxhall Night, you have Woolwich Lates and BR1 Lates, which they are really proud of now. They have been very successful. They are going to carry on using those brands to promote ongoing activity, even though our funding has now run out on those projects.”<sup>91</sup>*

The rising cost of living and shifts in consumer behaviour have significantly impacted London’s night-time economy. While initiatives like the Night Time Enterprise Zones programme have helped boost footfall and local spending, the sector remains under significant strain, underscoring the need for continued support.

### Recommendation 3

**The Mayor should initiate a new round of funding for the Night Time Enterprise Zones.**

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<sup>89</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London’s Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.5)

<sup>90</sup> Mayor of London, [Night Time Enterprise Zones Evaluation, February 2024 \(pp.6, 17\)](#)

<sup>91</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London’s Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.12)

## Night-time transport

In July 2017, the Mayor set out to “pave the way for the capital to become a trailblazing city at night, competing with the likes of Berlin, Tokyo and New York”.

However, night-time metro provision in Berlin and New York is currently more extensive than it is in London.<sup>92</sup> London's transport system operates between 5am and midnight daily, and five out of eleven lines run 24-hours on Fridays and Saturdays only. In contrast, the entirety of New York's metro system operates on a 24-hour, seven days-a-week basis. Berlin's metro shuts down between 1am and 4am on weekdays and operates on a 24-hour basis on weekends.

On balance, evidence heard by the Committee tended to be critical of night-time transport provision in London. Mark Williams from HOLBA told the Committee that even in this comparatively well-connected part of the capital, people have limited options after a theatre visit.<sup>93</sup> Similarly, the Royal Albert Hall, in its submission to the Committee's call for evidence, stated that it received feedback from audiences about having to leave shows prematurely for fear of missing transport connections.<sup>94</sup>

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“We have definitely seen mid-week trade really struggle. Some of that is down to the economic situation, but other parts of that is down to things like transport infrastructure post 11pm.”<sup>95</sup>

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### Michael Kill, Chief Executive Night Time Industries Association

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Many of our guests argued that mid-week night-time transport provision was insufficient, depressing mid-week footfall and presenting additional difficulties for businesses seeking to attract customers. Mark Williams told the Committee that the transport provision during the week was not able to match transport provision on the weekend with the Night Tube.<sup>96</sup> Data suggests the Night Tube is popular, with the service seeing nearly eight million journeys in 2016, its first year, exceeding predictions by around 15 per cent.<sup>97</sup> In 2023, around 77,000 night-tube journeys took place on a typical Friday night and 73,000 night-tube journeys took place on a typical Saturday night between the hours of 12:30am and 4:30am.<sup>98</sup>

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<sup>92</sup> The entirety of New York City's metro system run 24 hours, seven days a week, whilst the entirety of Berlin's metro system runs 24 hours on the weekend with a 3-hour break between 1am to 4am on weekdays. Transport provision in Tokyo is similar to London, operating hours can vary depending on the trainline.

<sup>93</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.19)

<sup>94</sup> Written evidence submitted to the Economy, Culture and Skills Committee by Royal Albert Hall. Published alongside report.

<sup>95</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.4)

<sup>96</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.4)

<sup>97</sup> London Assembly, [MQT 2018/1609](#), 21 June 2018

<sup>98</sup> Transport for London, [NUMBAT2023 NBT23FRI](#) and [NUMBAT2023 NBT23SAT](#)

The Committee also heard evidence on the link between transport and late-night crime and antisocial behaviour. Michael Kill highlighted to the Committee how a lack of transport can affect perceived safety, as well as concerns about noise and nuisance. He explained that without adequate public transport options available, people are more likely to walk home after a night out and make noise.<sup>99</sup> A 2022 research report by London TravelWatch found that frequent and reliable public transport is critical for people to feel safe when travelling after dark.<sup>100</sup>

Guests highlighted the cost of transport as a key issue. Steve Garelick, Regional Organiser at GMB, told the Committee that public transport for night-time workers can be expensive and that the cost of transport “has not decreased in an era where we have seen a high cost of living surge in the past few years”.<sup>101</sup> Similarly, the Federation of Small Businesses highlighted the comparatively high cost of public transport and cited their own research which found that 77 per cent of small businesses said that subsidies for public transport would “significantly help low paid workers and low-income self-employed people in London and assist in recruitment too.”<sup>102</sup>

Paul Broadhurst told the Committee that the GLA is currently working with the University College London (UCL) Social Data Institute to conduct survey-based research to deliver an evidence base specifically for night workers and their use of the transport system.<sup>103</sup> He told the Committee:

*“One of the key questions is where do night workers live, where do they work and how did they get to and from, at what times, what modes of transport, and what barriers are they facing? These are all the questions we are trying to dig into with that research, and we will hopefully be able to come back to you with some findings by the end of this year.”<sup>104</sup>*

The Committee recognises that, while London's night-time transport has improved with the introduction of the Night Tube, it still lags behind other major global cities in providing reliable, round-the-clock services, particularly mid-week and after 11pm. The Committee heard strong evidence highlighting gaps in the system, especially for night-time workers, and the need for more affordable transport options. Ongoing research by the GLA and UCL is a positive step in trying to better understand some of these issues, with the evidence we gathered suggesting that enhancing night-time transport could improve safety perceptions, support businesses, and

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<sup>99</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.12)

<sup>100</sup> London TravelWatch, [Personal Security on London's Transport Network](#), January 2022 (p.25)

<sup>101</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.2)

<sup>102</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Federation of Small Businesses (FSB). Published alongside report.

<sup>103</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.11)

<sup>104</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.10)

boost spending. However, further research is needed to fully understand the impact of expanding London's night-time transport services.

#### **Recommendation 4**

**The Mayor should carry out a review of how Londoners use night time transport to establish what tube, bus and other networks can be improved.**

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#### **Recommendation 5**

**The Mayor should instruct TfL to carry out an impact assessment and review existing night tube provision since 2016. This should assess the practicability, benefits or difficulties of expanding the night tube. It should also quantify the impact of extended operating hours on night-time footfall and spending, any as well as on TfL's revenue and expenditure. The impact assessment should start by the end of 2025.**

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## Licensing in the night-time economy

### Licensing and London's night-time businesses

Evidence heard by the Committee suggests that when making licensing decisions, local authorities must balance the interests of residents with the demands of night-time venues. Cllr Sabrina Francis told the Committee that the London Borough of Camden recognises the important role night-time venues play in providing places to bring people together. However, she added that local authorities are sometimes forced to make trade-offs between the interests of venues and nearby residents.<sup>105</sup>

#### Night-time licensing in London

As "licensing authorities", local authorities play an important role in licensing decisions. Although the Government produces statutory guidance to accompany the Act, it is up to local authorities to shape the "cultural milieu" and the vitality of their town centres. This is mainly done through setting a local licensing framework by issuing a "statement of licensing policy" every five years. This sets out how licensable activities will be regulated and how licensees can contribute to creating the evening and night-time economy that the council envisages, for example encouraging certain types of applications in certain areas. As a result of every borough being responsible for its own licensing regime, there currently is no pan-London approach to licensing.

The Licensing Act contains four objectives which licensing authorities must seek to promote when setting out their licensing policy:

- (1) the prevention of crime and disorder
- (2) safety
- (3) the prevention of public nuisance
- (4) the protection of children from harm.

Under the Act, licensing authorities have responsibility for issuing premises licenses and club premises certificates. Licensing authorities must publish a statement of licensing policy at least every five years. This is underpinned by licensing authorities' cumulative impact assessments (CIA), which serve to limit the number of licenses granted in areas where there is evidence that an increased number of licensed premises could have the effect of contravening the licensing objectives.

Venue operators told us that in their experience some councils focus on the negative aspects associated with nightlife, with Mark Williams telling the Committee that "often night-time economy is looked at through a negative lens".<sup>106</sup> A 2020 research paper in the Entertainment and Sports Law Journal examining licensing in London criticised the Licensing Act and its four

<sup>105</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (pp.1,3)

<sup>106</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.17)

objectives for their exclusive focus on minimising negative outcomes associated with a vibrant nightlife, such as crime and anti-social behaviour.<sup>107</sup>

Licensing in London was described as restrictive by multiple guests at the Committee's meetings, particularly in relation to permissions to extend opening hours. Simon Tracey said that it was currently "almost impossible" to get a 24-hour license.<sup>108</sup> He added that there was a discrepancy between the rhetoric of some local authorities regarding their night-time economy and how late-night licensing works in practice, with venue owners and operators often "considered a nuisance".<sup>109</sup>

In its submission to the Committee's call for evidence, the Music Venue Trust stated that councils frequently do not appreciate the reason for venues' licensing applications, such as extending opening hours. The Music Venue Trust pointed out that some local authorities fail to take into account the importance of longer opening for a venue's survival as "the hours of midnight onwards generally make up for the loss-making hours of 7-11".<sup>110</sup>

We heard evidence that local authorities' cumulative impact assessments (CIAs) can have a detrimental effect on local nightlife. Whilst the purpose of CIAs is to limit the number of licensed premises where this can be shown to negatively impact the objectives set out in the Licensing Act, we heard that using them as the sole basis for licensing decisions can detract from the vibrancy of an area at night. In its submission to the Committee's call for evidence, UKHospitality stated that local authorities frequently "roll-over" old CIAs based on "outdated evidence" to guide decision-making. The submission highlights that this can create entry barriers for new venues<sup>111</sup>. Likewise, evidence submitted by HOLBA suggests that the use of CIAs by some local authorities can have a negative impact on footfall and spending. The submission states that:

*"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."*<sup>112</sup>

However, we also heard that there were cases where local authorities introduced measures which were considered helpful by venue operators. Sophie Brownlee from the Music Venue Trust praised the London Borough of Hackney's early warning system, which helps venues

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<sup>107</sup> Roberts, M. et al. (2020) [The Night and Cultural Benefit: The Case for A Holistic Approach to Licensing](#), Entertainment and Sports Law Journal, Vol. 18(1)

<sup>108</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.19)

<sup>109</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.19)

<sup>110</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Music Venue Trust. Published alongside report.

<sup>111</sup> Written evidence submitted to the Economy, Culture and Skills Committee by UKHospitality. Published alongside report

<sup>112</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Heart of London Business Alliance (HOLBA). Published alongside report.

understand issues and complaints early on.<sup>113</sup> Similarly, Cllr. Sabrina Francis shared with the Committee that Camden has been running Citizens' Assemblies, which has enabled conversations between venues and residents and led to new insights into how conflicts may be resolved.<sup>114</sup>

Guests from the GLA told the Committee that the Mayor has been supporting local authorities in trialling new approaches towards licensing which could be adopted by boroughs across London through the Business Friendly Licensing and Regulation Fund. The total value of the fund, which ran across 2022 and 2023, was £185,000, with funding matched by successful boroughs. Overall, this resulted in eight projects across seven boroughs,<sup>115</sup> which included improving council websites and licensing processes, implementing a noise complaint early warning system for venues or setting up night-time citizen assemblies.<sup>116</sup>

Evidence shared with the Committee suggests there currently is a high degree of variability between different licensing authorities, as well as within single London boroughs. Sophie Brownlee shared an example with the Committee where one local authority developed a helpful initiative to get locals to visit venues by offering discounted tickets whilst at the same time denying temporary events notices (TENs) for venues specifically putting on the events.<sup>117</sup>

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"A more holistic approach across the capital would be helpful, as long as it is one which recognises the particularities of how particularly late-night club spaces serve marginalised communities, as spaces of not just leisure [...] but also of well-being, of livelihoods, of creative production, of music, of all of those things"<sup>118</sup>

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### **Prof. Ben Campkin, Professor of Urbanism and Urban History University College London**

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A number of our guests were strongly in favour of a more consistent approach to licensing, which links licensing with planning and recognises the positive social and economic value that a vibrant night-time economy provides. In its submission to the Committee's call for evidence, the Heart of London Business Alliance stressed the importance of looking at the night-time economy holistically, stating that the relaxation of licensing regulations alongside the provision of a positive planning policy framework can further economic growth and create jobs.<sup>119</sup> Simon Tracey from Broadwick Live pointed to the expenses associated with working across multiple different licensing regimes, telling the Committee that:

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<sup>113</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.15)

<sup>114</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (pp.3-4)

<sup>115</sup> The Boroughs awarded funding were Camden, Enfield, Hackney, Harrow, Islington, Merton and Westminster.

<sup>116</sup> Mayor of London, [Business Friendly Licensing](#)

<sup>117</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.1)

<sup>118</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.4)

<sup>119</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Heart of London Business Alliance (HOLBA). Published alongside report.

*“The more that these things can be decided upon centrally and the strategy applied the better, because all that leads to is massive expense for the operator to employ licensing lawyers, planning, endless planning surveys that are irrelevant, trying to unpick policy, all of that [can be] really, really difficult.”<sup>120</sup>*

We heard that the GLA plays an important role in facilitating collaboration between London's local authorities. Paul Broadhurst from the GLA pointed out to the Committee that the GLA set up the Night Time Borough Champion Network, formerly chaired by the Night Czar, to enable local authorities to share current thinking and talk about key challenges.<sup>121</sup> He told the Committee that a nominated councillor from each borough attends meetings twice a year to “share the latest thinking and practice and challenges and problem solving”.<sup>122</sup>

Shonagh Manson highlighted to the Committee that although night-time licensing is the preserve of boroughs, the GLA can “lead and influence”.<sup>123</sup> She stressed that the GLA is shaping London-wide thinking on the night-time economy by providing guidance and “masterclass” programmes to boroughs developing their night-time strategies.<sup>124</sup> Policy HC6 in the Mayor's London Plan encourages boroughs to develop their own night-time strategies<sup>125</sup> and the GLA has published two Night Time Strategy guidance documents, aimed at London boroughs.<sup>126</sup> Shonagh Manson stated that there were currently 12 boroughs developing night-time strategies, out of a total of 33 London local authorities.<sup>127</sup>

The GLA told us that it was in discussions with the Government about its own powers, as well as those of London's boroughs. Howard Dawber, London's Deputy Mayor for Business and Growth, told the Committee that “there is an ongoing discussion with the new Government about what roles and responsibilities in this sector we might want to strengthen, particularly with the boroughs in London as well.”<sup>128</sup> He also stated that the upcoming London Growth Plan is being written in collaboration with London Councils to ensure alignment across London.<sup>129</sup>

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<sup>120</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.10)

<sup>121</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.17)

<sup>122</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.17)

<sup>123</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.9)

<sup>124</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.6)

<sup>125</sup> Mayor of London, [The London Plan 2021](#), March 2021 (p.303)

<sup>126</sup> Mayor of London, [Night Time Strategy Guidance](#), December 2020

<sup>127</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.6)

<sup>128</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.16)

<sup>129</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.16)

Guests representing night-time businesses acknowledged that the GLA has very limited powers over licensing in London. However, Prof. Ben Campkin and Sophie Brownlee both argued that a more holistic approach to licensing across the capital would be beneficial.<sup>130</sup>

The evidence presented to the Committee highlights significant inconsistencies across London's licensing regimes, with each borough setting its own priorities, leading to a lack of coherence for venues. There is strong support for a more integrated and holistic approach to licensing that links it with planning and acknowledges the positive social and economic contributions of the night-time economy. The Committee welcomes the ongoing efforts of the GLA in collaboration with local authorities but believes further alignment is essential to ensure a thriving nightlife that benefits both businesses and local communities.

### Recommendation 6

**The Mayor should use regular engagement sessions, such as the Night Time Borough Champions Network and the Night-Time Strategy Masterclass Sessions, to develop and share best practice and encourage local authorities to take a more consistent approach to licensing.**

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### Recommendation 7

**The Mayor should review the impact that London's current licensing regime has on the success of the night-time economy and, working with boroughs, take steps to strengthen this regime. This could include setting up a pan-London register of relevant licensing applications.**

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### Recommendation 8

**Given one of the stated aims of the Business Friendly Licensing and Regulation Fund was to trial new licensing practices which could be adopted by other London boroughs, the Mayor should identify successful approaches and encourage their adoption across London.**

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<sup>130</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (pp.4-5)

## A vibrant and inclusive night-time economy

### London's LGBTQ+ venues

London's LGBTQ+ venues serve an important purpose, not only as places for entertainment but also as community spaces for London's varied LGBTQ+ communities. London has the highest proportion of LGBTQ+ people in the UK,<sup>131</sup> and there has long been a vibrant LGBTQ+ community in the city, dating back to the 18<sup>th</sup> and 19<sup>th</sup> centuries when certain London pubs and coffeehouses became popular gay meeting places, known as "Molly-houses".<sup>132</sup> To their patrons, LGBTQ+ spaces often function as community centres and places where people can feel safe and learn about LGBTQ+ history.<sup>133</sup> These venues also played an important role in London in helping people through the HIV/AIDS epidemic, and continue to help with HIV education and prevention today.<sup>134</sup>

There is no long-term definitive annual dataset on the number of LGBTQ+ venues in London, although data has been collected at various points. A 2017 study by Ben Campkin and Laura Marshall found that, between 2006 and 2017, 58 per cent of London's LGBTQ+ venues were lost, with total numbers falling from 121 in 2006 to 51 in 2017.<sup>135</sup> This data is based on a range of sources, including city guide websites, neighbourhood listings, city guidebooks, social media sites, fashion and music media, LGBTQ+ history websites, LGBTQ+ archives, LGBTQ+ media, local newspaper, national newspapers, pub guides, and venue websites.<sup>136</sup>

Paul Broadhurst told the Committee that the number of venues has been broadly stable since 2017, with 50 LGBTQ+ venues operating in London as of 2023.<sup>137</sup> This is based on data from the GLA's Cultural Infrastructure Map, which provides an overview of the location of cultural infrastructure (e.g. LGBTQ+ venues, grassroots music venues, museums and galleries) across London. The data in the Map is compiled by the GLA in collaboration with expert groups, such as the Music Venue Trust, UCL Urban Lab, and the Theatres Trust. Londoners can also suggest missing venues and suggest changes to details about existing venues.<sup>138</sup>

As businesses operating in the night-time economy, LGBTQ+ venues have been impacted by the pandemic and face a similar set of challenges as other night-time economy businesses. However, research suggests that there are specific challenges facing LGBTQ+ venues in London. The 2017 study by Ben Campkin and Laura Marshall found that the most common

<sup>131</sup> Office for National Statistics, [Sexual orientation, England and Wales, Census 2021](#)

<sup>132</sup> Museum of London, [Hidden Pride: London's LGBT history](#), 2 February 2019

<sup>133</sup> Modus, Royal Institute of Chartered Surveyors, [Pride and prejudice: queer venues in crisis](#), 23 September 2022

<sup>134</sup> UCL, [Let's talk about why LGBTQ+ spaces are vital in London](#), 15 June 2023

<sup>135</sup> Campkin, B., Marshall, L. (2017) [LGBTQ+ Cultural Infrastructure in London: Night Venues, 2006-2017, Executive Summary](#). UCL Urban Laboratory, September 2017 (p.7)

<sup>136</sup> Campkin, B., Marshall, L. (2017) [LGBTQ+ Cultural Infrastructure in London: Night Venues, 2006-present](#), UCL Urban Laboratory, July 2017 (pp.13-14)

<sup>137</sup> London Assembly, [MQT 2023/3794](#), 12 October 2023

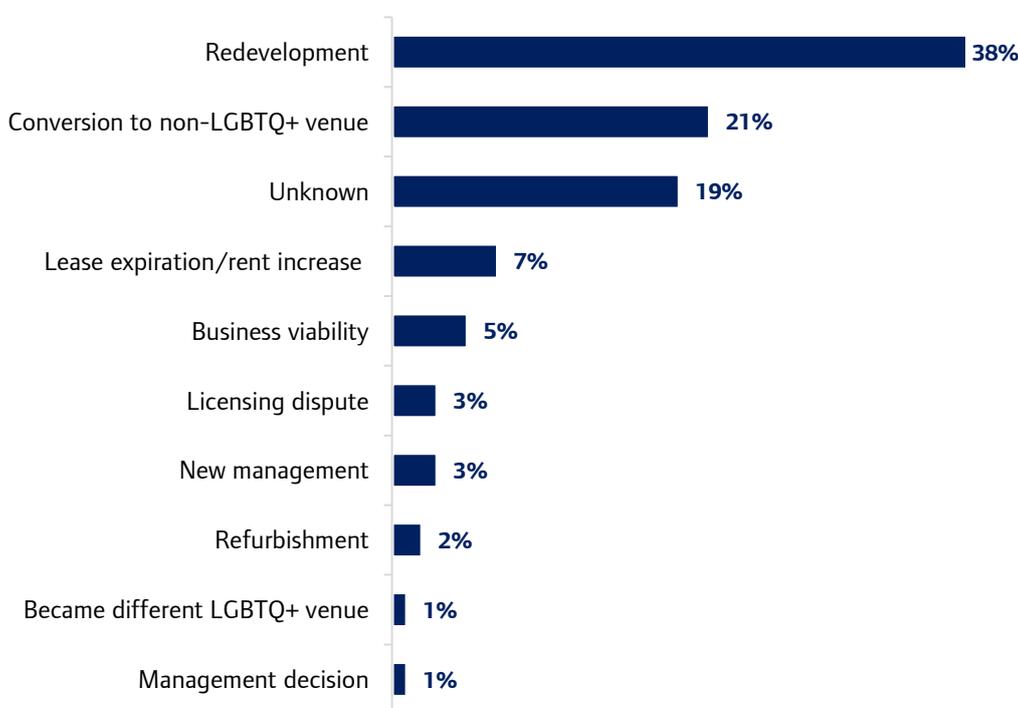
<sup>138</sup> Mayor of London, [Cultural Infrastructure Map](#)

reason for venues closing between 2006 and 2017 was redevelopment of the sites they were occupying, with 38 per cent of venues closing for this reason.<sup>139</sup> In 21 per cent of cases, the venue was converted into a non-LGBTQ+ venue, while rent increases accounted for seven per cent of closures. Other reasons were comparatively uncommon.<sup>140</sup> Prof. Ben Campkin told the Committee that many venues “closed at the time of their highest popularity”.<sup>141</sup>

The Committee heard that LGBTQ+ venues have been threatened by re-development as the sites they occupy have become lucrative for developers seeking a more profitable use of the site. Prof. Ben Campkin stressed the role of the planning environment, telling the Committee that “urban development and particularly an internationally globally fuelled finance real estate-led form of infrastructure and housing redevelopment has definitely had a negative impact.”<sup>142</sup>

**Figure Two: Reasons for closure of LGBTQ+ nightlife venues in London, 2006 to 2017**

Redevelopment was the most common reason for the closure of LGBTQ+ night-time venues



Source: adapted from Campkin, B., Marshall, L. (2017) [LGBTQ+ Cultural Infrastructure in London: Night Venues, 2006-2017, Executive Summary](#). UCL Urban Laboratory, September 2017 (p.7)

<sup>139</sup> Campkin, B., Marshall, L. (2017) [LGBTQ+ Cultural Infrastructure in London: Night Venues, 2006-2017, Executive Summary](#). UCL Urban Laboratory, September 2017 (p.7)

<sup>140</sup> Campkin, B., Marshall, L. (2017) [LGBTQ+ Cultural Infrastructure in London: Night Venues, 2006-2017, Executive Summary](#). UCL Urban Laboratory, September 2017 (p.7)

<sup>141</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.7)

<sup>142</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.7)

The 2017 study found that venues often closed at a point of lease renewal, with operators unable to negotiate reasonable terms to continue the lease. It further found that landlords are often large multi-national property developers seeking to maximise returns on their landholdings, with “the desirability of the neighbourhood and development value” being a key factor.<sup>143</sup>

The Public Sector Equality Duty contained in section 149 of the Equality Act 2010 requires public authorities to have due regard to several equality considerations when exercising their functions.<sup>144</sup> In line with this, local authorities may carry out Equality Impact Assessments (EqIAs) to assess how large-scale redevelopment projects may affect groups with protected characteristics, which includes sexual orientation. However, we heard that when carried out, EqIAs often have limited value due to how protected characteristics are defined, as they are insufficiently nuanced and fail to take into account the high degree of diversity across London's LGBTQ+ communities.<sup>145</sup>

We heard that in this context, the survival of LGBTQ+ venues requires policymakers to take an on an active role. Prof. Ben Campkin told the committee that LGBTQ+ venues “do not survive without intervention in this context of rapid development”. He also praised the work of the Night Czar, who he stated has been “important in using their convening power within particular planning situations”.<sup>146</sup>

The GLA told us that it has been supporting London's LGBTQ+ venues by providing one-to-one support to venues at risk of closing. Paul Broadhurst told the Committee that the GLA has been providing support to a number of venues, such as working in partnership with Equity to prevent the closure of the Bethnal Green Working Men's Club or helping to re-open the Black Cap, a Camden LGBTQ+ venue that shut in 2015. He specified that much of the support provided by the GLA revolved around “problem-solving” to help keep a venue open, which involved advising venues about planning issues and educating local authorities on the challenges venues are facing.<sup>147</sup>

The current Government has committed to reform the planning system. Given the role that re-development proposals play in explaining the high rate of closures of LGBTQ+ venues, this may pose a threat to the remaining LGBTQ+ venues in London. Deputy Mayor Howard Dawber told the Committee that the GLA was currently engaging in discussions with the Government about legislative reform with regard to planning in London.<sup>148</sup>

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<sup>143</sup> Campkin, B., Marshall, L. (2017) [LGBTQ+ Cultural Infrastructure in London: Night Venues, 2006-present](#), UCL Urban Laboratory, July 2017 (p.45)

<sup>144</sup> [Equality Act 2010](#), s.149

<sup>145</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.11)

<sup>146</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.8)

<sup>147</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (pp.2-3)

<sup>148</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.22)

The Committee notes that, whilst the number of venues has stabilised in recent years, the threat of closures remains a significant concern, with many venues being forced out due to the high demand for real estate. The survival of these venues depends on active intervention from policymakers, particularly with regards to planning policy. The GLA's efforts to support at-risk venues are welcome, but further legislative reform, particularly around planning, is needed to ensure the long-term preservation of LGBTQ+ spaces in London.

## Recommendation 9

**As part of his engagement with the Government over planning reform, the Deputy Mayor for Business and Growth should explicitly raise the importance of protecting night-time venues particularly at risk in London, such as LGBTQ+ venues and other cultural spaces. He should report back to the Committee on the outcome of these discussions.**

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## London's grassroots music venues

Many guests emphasised to the Committee the importance of Grassroots Music Venues (GMVs) to London's night-time economy and wider cultural landscape. In its written evidence, Equity stated that GMVs and other small live music venues were "vital incubators of talent", which provide a "safe space for young performers to develop their act, experiment and grow as a performer."<sup>149</sup>

Evidence suggests that GMVs play an indispensable role in producing new talent and growing the UK music scene. Analysis by the Music Venue Trust shows 88 out of the 96 artists (92 per cent) in the 2024 Glastonbury line-up started their careers performing at grassroots venues.<sup>150</sup> Simon Tracey, who, as Group Chief Executive at Broadwick Group oversees the management of several large venues, told the Committee that small venues were "absolutely critical for our [venues'] survival because it is impossible to book talent and sell lots of tickets if those individuals have not been able to hone their craft elsewhere and build followings and have the ability to sell tickets".<sup>151</sup>

However, data shows that large numbers of GMVs have closed across the UK. According to the Music Venue Trust, 2023 was the worst year for venue closures since the organisation was launched 10 years ago, with 125 venues shutting down in the UK.<sup>152</sup>

The number of GMVs in London has not been systematically collected on an annual basis, although data has been collected at different points over recent years. Data published in 2017 by the GLA shows that venues declined by 35 per cent from 144 to 94 between 2007 and

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<sup>149</sup> Written evidence submitted to the Economy, Culture and Skills Committee by Equity. Published alongside report.

<sup>150</sup> Music Venue Trust, [The Vital Role of Grassroots Music venues in Festival Headliners' journey](#), 27 March 2024

<sup>151</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.4)

<sup>152</sup> Music Venue Trust, [Music Venue Trust Launch Annual Report](#), 24 January 2024

2016.<sup>153</sup> According to the GLA Cultural Infrastructure Map and based on data collected by the Music Venue Trust, the number of venues has since begun to rise again, increasing from 100 in 2019 to 132 in 2022.<sup>154</sup> However, we should be careful in interpreting these figures, as the Music Venue Trust told us that venues can move in and out of the 'GMV' category, depending on the sorts of programmes being delivered. If a venue's programming in a specific year does not include new and emerging talent, the venue would not be classified as a GMV in that specific year. For example, longstanding venues Koko and the O2 Shepherd's Bush Empire are included in the 2022 figure, but not in the 2019 figure as a result of their respective programming in those years.<sup>155</sup>

Unlike LGBTQ+ venues, research suggests that redevelopment proposals alone are not the main driver explaining recent closures. According to data compiled by the Music Venue Trust, whilst 12 per cent of UK venues that closed in 2023 did so due to redevelopment, issues around financial viability and operational issues (including noise complaints) play a more significant role.<sup>156</sup> Sophie Brownlee told the Committee that in over half of cases where venues receive emergency support from the Music Venue Trust, this is because they struggle financially.<sup>157</sup> In its submission to the Committee's call for evidence, the Music Venue Trust stated that in 2023, GMVs spent £248 million on presenting live music but only generated £131 million in ticket revenue.<sup>158</sup>

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<sup>153</sup> Mayor of London, [Rescue Plan for London's Grassroots Music Venues, Making progress](#), January 2017 (p.15)

<sup>154</sup> London Datastore, [2019 Grassroots Music Venues Dataset](#) and [2024 Grassroots Music Venues Dataset](#)

<sup>155</sup> London Datastore, [2019 Grassroots Music Venues Dataset](#) and [2024 Grassroots Music Venues Dataset](#)

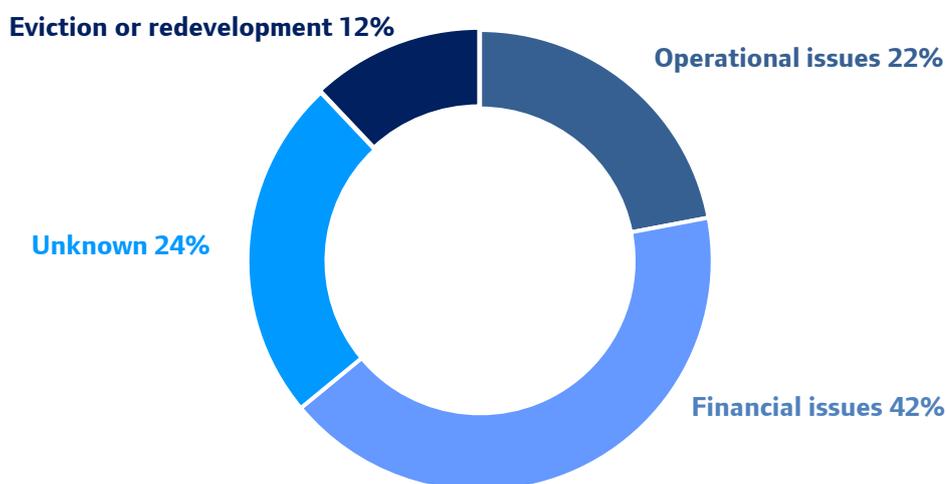
<sup>156</sup> Music Venue Trust, [Annual Report 2023](#)

<sup>157</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.10)

<sup>158</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Music Venue Trust. Published alongside report.

**Figure Three: Reasons for closure of grassroots music venues in the UK in 2023**

"Financial issues" were the most common reason for closures of grassroots music venues that were members of the Music Venue Trust in 2023



Source: adapted from Music Venue Trust, [Annual Report 2023](#), p14

Data indicates that GMVs operate with slim profit margins, leaving them vulnerable to market changes. In its submission to the Committee's call for evidence, the Music Venue Trust stated that despite strong demand, the current profit margin for the average GMV is around 0.5 per cent.<sup>159</sup> Sophie Brownlee told the Committee that as a result of their precarious financial position, many GMVs are struggling to afford rent and business rate increases.<sup>160</sup> According to the Music Venue Trust, the average rent paid by GMVs in the UK increased by 37.5 per cent between 2022 and 2023.<sup>161</sup>

"Ultimately venues are closing because the cost of presenting new and original live music vastly outweighs the possible income that can be derived from doing it"<sup>162</sup>

**Sophie Brownlee, External Affairs Manager  
Music Venue Trust**

Venues are also affected by the rising cost of living and its impact on consumer spending. In its submission, the Music Venue Trust states that venues have struggled to remain profitable as fewer people are willing to spend money on alcohol. The submissions stresses that this poses a serious problem for GMVs, many of which have traditionally relied on alcohol sales to offset

<sup>159</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Music Venue Trust. Published alongside report.

<sup>160</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.10)

<sup>161</sup> Music Venue Trust, [Annual Report 2023](#) (p.4)

<sup>162</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.10)

losses made from putting on live music.<sup>163</sup> Although some venues have increased ticket and drink prices, this has not been able to fully offset the rising costs. Data from the Music Venue Trust shows that the profit margin of the average GMV in 2023 was 0.5 per cent.<sup>164</sup> When only considering expenditure and income related to live music, the average GMV incurred a yearly loss of £137,502.<sup>165</sup>

Another reason that ticket prices in the UK are currently more expensive is due to a comparatively high VAT rate on tickets for cultural events. Sophie Brownlee told the Committee that the UK's 20 per cent VAT rate on tickets puts further pressure on GMVs.<sup>166</sup> Data compiled by UK Music shows that the UK's 20 per cent VAT rate on cultural tickets is nearly twice as high as the EU average, which stands at 10.3 per cent.<sup>167</sup>

We also heard that like other night-time businesses, GMVs are property-intensive businesses and as such are particularly susceptible to rises in business rates (see above).<sup>168</sup>

In addition to financial challenges, we heard that a large number of London's GMVs have also been involved in disputes as new residential developments are being in the vicinity. In its submission to the Committee's call for evidence, the Federation of Small Businesses stated that small music venues have increasingly been facing noise complaints from nearby residents, making it difficult for them to operate.<sup>169</sup>

Paul Broadhurst from the GLA told the Committee that the London Plan contains provisions to protect venues in case of disputes, such as the "Agent of Change Principle". This is intended to protect existing venues from threat of closure from noise complaints as it requires new residential developments to put in place measures to mitigate and manage noise, as opposed to placing the onus for taking such measures on existing venues. The policy requires local planning authorities to consider refusing development proposals that have not demonstrated how noise impacts will be mitigated and managed.<sup>170 171</sup>

However, we heard that there is currently no statutory mechanism for enforcing this principle. In its submission to the Committee's call for evidence, UKHospitality stated that the Agent of Change principle "lacks teeth" as it is guidance, rather than a legal stipulation, adding that there is a lack of understanding of how the principle is applied on a practical level.<sup>172</sup> This was

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<sup>163</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Music Venue Trust. Published alongside report.

<sup>164</sup> Music Venue Trust, [Annual Report 2023](#) (p.11)

<sup>165</sup> Music Venue Trust, [Annual Report 2023](#) (p.11)

<sup>166</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.10)

<sup>167</sup> UK Music, [UK Music Call On Chancellor To Slash VAT To Throw Industry A "Vital Lifeline" And Help Save Closure-Threatened Venues](#), 28 February 2024

<sup>168</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Music Venue Trust. Published alongside report.

<sup>169</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Federation of Small Businesses (FSB). Published alongside report.

<sup>170</sup> Mayor of London, [The London Plan 2021](#), March 2021 (pp.150-151)

<sup>171</sup> London Assembly, [MQT 2017/2465](#), 22 June 2017

<sup>172</sup> Written evidence submitted to the Economy, Culture and Skills Committee by UKHospitality. Published alongside report.

echoed in the submission of the Music Venue Trust, which highlighted that the principle is currently applied inconsistently across local authorities with some venues protected by it and others not.<sup>173</sup>

We heard that GMVs are frequently excluded from planning deliberations, owing to them not being classed as statutory consultees. Sophie Brownlee from the Music Venue Trust told the Committee that unlike theatres, local authorities do not have to consult GMVs prior to granting planning permission. She referred to the example of the Windmill (a venue in Brixton), where a developer seeking to build in the venue's vicinity did not inform the venue, which meant it was too late for the venue to submit their objection. Sophie Brownlee added that:

*"It is issues like that where new residents coming into a development may not be aware at all that they are opposite an iconic music venue and then the noise complaints start coming in. That is when the music venue has real trouble doing anything about it and then that leads to a closure."*<sup>174</sup>

In the absence of statutory protections, guests from the GLA highlighted to the Committee the work they have done supporting venues involved in disputes on a one-to-one basis. Paul Broadhurst told the Committee that the GLA frequently advises venues on planning issues whilst also working with local authorities to help them understand the challenges particular venues are facing. He told the Committee about a particular case involving Corsica Studios, a venue in Elephant and Castle, summarising the GLA's work as follows:

*"Corsica Studios at Elephant and Castle, a residential block going up right on the doorstep of it, right at the back, just a few metres away. Lots and lots of in-depth conversations because this is a test case in many ways with the developer, with the Council, with us and with the venue sitting around the table over weeks and weeks and weeks, ensuring that the right mitigations were put in place to ensure that venue, which is a really loud venue, probably one of the loudest venues in the country, was able to continue its operation even with residents living at the back".*<sup>175</sup>

Sophie Brownlee told the Committee that, in some instances, mediation has been shown to be helpful in protecting venues.<sup>176</sup> However, she added that there was a need for "much greater understanding and proper enforcement" of the Agent of Change principle on the ground.<sup>177</sup>

Finally, we heard that due to their precarious financial position, GMVs frequently do not have funds to invest in making their space more accessible to people with disabilities. In its submission to the Committee's call for evidence, the Music Venue Trust stated that GMVs in London are often located in older buildings that are difficult to renovate or in buildings with

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<sup>173</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Music Venue Trust. Published alongside report.

<sup>174</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.15)

<sup>175</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.6)

<sup>176</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.15)

<sup>177</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.3)

multiple sets of steps and sub-pavement level rooms.<sup>178</sup> Prof. Ben Campkin from University College London told the Committee that LGBTQ+ venues face similar challenges, as they are often located in former industrial spaces.<sup>179</sup> Sophie Brownlee stressed that despite these challenges, many venues are keen to make their spaces more accessible but are lacking the requisite funding, support and guidance.<sup>180</sup>

Shonagh Manson from the GLA told the Committee that the GLA made funding available during the pandemic via its £2.3 million Culture at Risk Emergency Fund to help “grassroots venues that needed it most”.<sup>181</sup> She added that the GLA also worked to stimulate demand through campaigns, such as the “Let’s Do London” campaign.<sup>182</sup>

Whilst the Culture at Risk Emergency Fund provided important support for organisations during the pandemic, it is clear that GMVs are still facing considerable financial pressures and are in need of support. The Mayor has committed to introducing a new “nightlife fund”,<sup>183</sup> and it is vital that GMVs are able to access support as part of this fund.

The Committee is aware of the recommendation of the House of Commons Culture, Media and Sport Committee to introduce a voluntary levy on arena and stadium tickets to support GMVs.<sup>184</sup> The Government’s response received on 7 November 2024 states that the Government agrees with the recommendation and wants to see an industry levy introduced for concerts in 2025.<sup>185</sup>

In conclusion, GMVs are vital to both London’s cultural landscape and the broader UK music scene, nurturing emerging talent and providing spaces for live music. While the GLA has offered targeted support, GMVs remain in a precarious position. Further intervention, such as the proposed Nightlife Fund and industry-wide levy, is crucial to ensuring the survival of these essential venues.

## Recommendation 10

**The GLA should encourage boroughs to incorporate the Agent of Change principle into their night-time strategies.**

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<sup>178</sup> Written evidence submitted to the Economy, Culture and Skills Committee by the Music Venue Trust. Published alongside report.

<sup>179</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.16)

<sup>180</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 2\)](#), 24 July 2024 (p.17)

<sup>181</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London’s Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.2)

<sup>182</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London’s Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.2)

<sup>183</sup> Sadiq Khan, [A Fairer, Safer, Greener London for everyone](#), April 2024

<sup>184</sup> House of Commons Culture, Media and Sport Committee, [Grassroots music venues](#), 8 May 2024

<sup>185</sup> House of Commons Culture, Media and Sport Committee, [Grassroots music venues: Government response](#), 14 November 2024

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### Recommendation 11

**The Mayor should lobby the Government to put the Agent of Change principle on a statutory footing.**

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### Recommendation 12

**The Mayor should advocate for London's live music industry to introduce a voluntary levy on arena and stadium tickets to support grassroots music venues in London**

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### Recommendation 13

**The Mayor should ensure that grassroots music venues are able to access financial support through his new proposed 'Nightlife Fund', along similar lines to the Culture at Risk Fund which operated during the pandemic.**

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### Recommendation 14

**The Mayor should work with people with lived experience of disability to produce a guidance document for music venues in London to help them make their spaces more accessible.**

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## Licensing discrimination

London's live music scene is a reflection of the city's diversity, encompassing a wide variety of different genres and artists from a range of cultural and ethnic backgrounds. Despite this, the Committee heard that music creators from minority backgrounds, particularly Black creators, face ongoing discrimination when seeking to perform in front of live audiences in London. Dr Charisse Beaumont, Chief Executive and Co-Founder of Black Lives in Music, told the Committee that it is not uncommon for the Metropolitan Police Service to exert pressure on promoters and venues to cancel events by Black artists.<sup>186</sup>

A report published by the House of Commons Digital, Culture, Media and Sport Committee in 2019 found that, despite the abolition of form 696, discrimination based on race continued to affect the entertainment sector.<sup>187</sup> Dr Charisse Beaumont told us that the form had left a "legacy" and that promoters now commonly have to fill in different forms, such as Temporary Event Notices (TENs), which ultimately serve the same purpose of providing the police with information about the genre being played, from which it is possible to make assumptions about the expected audience.<sup>188</sup>

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<sup>186</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.1)

<sup>187</sup> House of Commons Digital, Culture, Media and Sport Committee, [Live Music](#), March 2019 (p.11)

<sup>188</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (pp.1, 8)

### What is form 696?

The Promotion Event Risk Form 696 (commonly referred to as “form 696”) was a risk assessment form used by the Metropolitan Police Service across 21 London boroughs between 2005 and 2017. This was a voluntary form for Promoters and venue owners to complete in advance of an event. Despite the form being voluntary, promoters who did not submit the form frequently had their licenses refused.<sup>189</sup> The form was controversial because it required information about the style of music being played, as well as the ethnicity of the audience. This was criticised by music creators, promoters, as well as the Equality and Human Rights Commission.<sup>190</sup> A common criticism was that it enabled the police to arbitrarily determine which events they deemed to be “high risk” and refuse event licenses on this basis.<sup>191</sup> The form was abolished by London Mayor Sadiq Khan in 2017.

We heard that cancellations frequently happen due to purported safety concerns. However, Dr Charisse Beaumont told the Committee that this was commonly used as a pretext and that safety concerns are not based on evidence.<sup>192</sup> She added that venues typically lack relationships with the police and local councillors, leading them to give in to the pressure for fear of having their licenses revoked, stating that:

*“Larger organisations, larger venues do not have that issue because they have relationships with the police, they have relationships with their local councillors. But smaller venues, Black promoters, do not have such relationships. Therefore, there is no protection, there is no transparency, there is no way of being able to appeal or rebut against certain decisions”<sup>193</sup>*

In 2023 the Mayor, in response to a letter by the advocacy group Black Lives in Music and the Musician's Union regarding the issue of discrimination in licensing, launched the Race Equality in Music Event Licensing project. As part of this project, Black Lives in Music has been commissioned to research the impact of policies and interactions with the police, councils, venues and promoters on Black, Asian and ethnically diverse music events and that this project is currently ongoing.<sup>194</sup>

The Committee has written to the Metropolitan Police Service regarding this issue, and asked it to respond to the points made by Dr Beaumont at the Committee's meeting. At time of writing, the Committee has not received a response.

Based on the evidence we heard, discrimination against Black, Asian and minority ethnic artists and promoters remains a significant issue in London's life music scenes, with ongoing challenges

<sup>189</sup> The Horniman Museum, [What was Form 696](#), November 2021

<sup>190</sup> The Horniman Museum, [What was Form 696](#), November 2021

<sup>191</sup> The Guardian, [Public enemy no 696](#), 21 January 2009

<sup>192</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p. 8)

<sup>193</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p. 5)

<sup>194</sup> Mayor of London, [Race Equality in Music Event Licensing](#)

related to event cancellations and disproportionate scrutiny from the police. The Mayor's Race Equality in Music Licensing project is a positive step towards addressing these issues by building a stronger evidence base of the impact of police practices. The Committee would welcome a clear response from the Metropolitan Police Service regarding these issues.

## Recommendation 15

**MOPAC and the Metropolitan Police Service should engage constructively with the upcoming report from Black Lives in Music and provide a quick response to its findings.**

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## The Women's Night Safety Charter and the Ask for Angela scheme

In 2018, the GLA launched the Women's Night Safety Charter (WNSC) to help venues commit to improving safety for women and girls at night. The WNSC contains seven pledges which any organisation can sign up to.<sup>195</sup> The GLA also funded first aid training for LGBTQ+ venue staff and encourages venues to support vulnerable customers and staff by offering "Welfare and Vulnerability Engagement" and training for the Mayor's "Ask for Angela Scheme".<sup>196</sup>

The Ask for Angela scheme aims to help anyone who is feeling vulnerable on a night out to get the support they need. Members of staff in night-time venues are trained so that, if a customer 'asks for Angela', they can provide support such as calling security or leading the person to a safe space.<sup>197</sup>

After the Committee's meetings for our investigation had concluded, in November 2024, BBC News published a story showing that staff were failing to respond to the code word and take action in various London venues.<sup>198</sup> Secret filming by BBC researchers found that in more than half of the participating London venues they visited, including major chains, staff failed to respond to the code word.<sup>199</sup>

Some councils already include the operation of Ask for Angela as a consideration in granting licences to sell alcohol, including Westminster City Council and Camden Council.<sup>200</sup> The Committee believes that more councils should adopt this approach – provided that the scheme operates effectively and staff in venues are properly trained.

## Recommendation 16

**The Mayor should work with London Councils to promote best practice in licensing. This should include adding the Ask for Angela scheme to venues licensing conditions, so that operation of the scheme becomes enforceable as part of routine licensing visits.**

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<sup>195</sup> Mayor of London, [Women's Night Safety Charter](#)

<sup>196</sup> Document provided to the Economy, Culture and Skills Committee by the 24 Hour London Team via e-mail on 22 July 2024

<sup>197</sup> Ask for Angela, [About](#)

<sup>198</sup> BBC News, [BBC secret filming shows pubs not enforcing safety scheme](#), 13 November 2024

<sup>199</sup> BBC News, [BBC secret filming shows pubs not enforcing safety scheme](#), 13 November 2024

<sup>200</sup> BBC News, [BBC secret filming shows pubs not enforcing safety scheme](#), 13 November 2024

## Workers in London's night-time economy

### Pay and conditions in the night-time economy

We heard that pay in the night-time economy is, on average, lower than it is across the economy as a whole. Shonagh Manson from the GLA told the Committee that workers in night-time industries remain more likely to be paid below the London Living Wage (LLW).<sup>201</sup> GLA data shows that one in five (20 per cent) workers in the night-time cultural and leisure sector (including workers in hospitality, private security firms and creative, arts and entertainment sectors) were still paid below the LLW in 2022, although this has improved from 28 per cent in 2017.<sup>202 203</sup>

Despite the general pattern of improvement in rates of pay across the sector, we heard that given the current economic challenges, businesses struggle to pay London Living Wage. In its submission to the Committee's call for evidence, UKHospitality stated that the 2024 increase in the national living wage had a "significant cost impact on hospitality businesses".<sup>204</sup> Similarly, Simon Tracey said that many businesses in the night-time economy have slim margins, particularly firms contracted to support large events. Referring to contractors the Broadwick Group has worked with in the past, Simon Tracey told the Committee:

*"They might be delivering 500 staff, but they might be making like less than a pound per person on that. The pressures to then pay the people properly gets harder and harder."*<sup>205</sup>

We heard that the impact of these margins is felt acutely by night-time workers. In its submission to the Committee's call for evidence, GMB stated that its members were "experiencing a race to the bottom with regards to their pay and conditions".<sup>206</sup> Steve Garelick told the Committee that within some companies, "tipping culture" was becoming more common to cut staffing costs.<sup>207</sup>

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<sup>201</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.10)

<sup>202</sup> GLA Economics, [London at Night: An Updated Evidence Base for a 24 Hour City](#), March 2024

<sup>203</sup> Document provided to the Economy, Culture and Skills Committee by the 24 Hour London Team via e-mail on 22 July 2024

<sup>204</sup> Written evidence submitted to the Economy, Culture and Skills Committee by UKHospitality. Published alongside report

<sup>205</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London's Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.9)

<sup>206</sup> Written evidence submitted to the Economy, Culture and Skills Committee by GMB. Published alongside report.

<sup>207</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.2)

### Who is a night worker?

There is no universally accepted definition of who qualifies as a night worker. The GLA defines night workers as those who work anytime between 6pm and 6am.<sup>208</sup> This includes a variety of professions not related to arts, recreation and hospitality, such as healthcare workers or people working in transport and storage. In 2023, the arts & recreation and hospitality sectors employed 144,400 night workers, making up around 18 per cent of London's night-time workforce.<sup>209</sup>

The GLA also measures employment within London's night-time industries, which encompasses all people working within those sectors with relatively high proportions of night-time workers, including those working during the day.

Whilst the number of employees within the night-time industries has grown by 8.9 per cent since 2017,<sup>210</sup> the number of night workers in London has been falling. In 2023, London had 1.32 million night workers, down from 1.6 million in 2017. The rate of decline has been particularly steep within hospitality, with the number of night-time workers in the sector seeing a decline of 49 per cent between 2017 and 2023.<sup>211</sup>

Evidence suggests that pay is particularly low for freelance workers, who are heavily represented in the arts, cultural and entertainment space. According to a 2023 survey of freelancers working across theatre, live events and other entertainment sectors, freelancers in those sectors earned on average 17.5 per cent below the national average.<sup>212</sup> Nearly half of all respondents (46 per cent) reported their income had decreased compared to before the pandemic.<sup>213</sup>

The Freelancer survey results also indicate that this has been compounded by cost-of-living pressures, with "financial uncertainty" and "underpayment" ranking as the most widely reported concerns.<sup>214</sup> Multiple respondents stated that employers were receiving government grants but spent the majority of it on administration, as opposed to wages for freelancers.<sup>215</sup> Dugald Johnson from Equity told the Committee that whilst Equity and other unions have agreements with large West End producers setting out pay and conditions, "lots of areas of the industry are much more like the Wild West when it comes to the sorts of pay and conditions that they are putting up with".<sup>216</sup>

<sup>208</sup> GLA Economics, [London at Night: An Updated Evidence Base for a 24 Hour City](#), March 2024 (p.10)

<sup>209</sup> GLA Economics, [London at Night: An Updated Evidence Base for a 24 Hour City](#), March 2024

<sup>210</sup> GLA Economics, [London at Night: An Updated Evidence Base for a 24 Hour City](#), March 2024

<sup>211</sup> GLA Economics, [Analysis on Evening & Night workers in London](#), January 2023

<sup>212</sup> Freelancers Make Theatre Work, [The Big Freelancer Survey 2023](#) (p.9)

<sup>213</sup> Freelancers Make Theatre Work, [The Big Freelancer Survey 2023](#) (p.15)

<sup>214</sup> Freelancers Make Theatre Work, [The Big Freelancer Survey 2023](#) (p.13)

<sup>215</sup> Freelancers Make Theatre Work, [The Big Freelancer Survey 2023](#) (p.17)

<sup>216</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (pp.16-17)

Additionally, we heard evidence that there has been an intensification of the workload of people working within the entertainment sector following the pandemic. In its submission to the Committee's call for evidence, Equity stated that demands for performers and stage managers were "incredibly high", with working hours typically exceeding 44-48 hours per week across six days. It further states that the industry's reliance on short-term contracts and the precarity associated with this leads to "intense competition for work", increasing risks of overwork and burnout.<sup>217</sup> Dugald Johnson told the Committee that workers in the sector are frequently discouraged from taking rest breaks.<sup>218</sup>

The Mayor's Good Work Standard (GWS) was launched in 2019 and provides accreditation to businesses fulfilling a set of criteria, relating to pay and working conditions. Deputy Mayor Howard Dawber told the Committee that the GLA is currently working to encourage more businesses in the night-time economy to become accredited employers.<sup>219</sup> However, the GWS currently does not cover freelance work as it only applies to employees.

While there have been some improvements in pay within London's night-time economy, significant challenges remain, particularly for workers in lower-wage roles and freelancers. The Committee believes that further efforts are needed to ensure fair pay and secure working conditions for all, particularly for those not classified as employees.

## Recommendation 17

**The Mayor should develop a code of practice for organisations in the entertainment sector in London who employ freelancers, to ensure better pay and conditions for these workers, along similar lines to the Good Work Standard.**

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## Zero-hours contracts and informal work arrangements

The Committee heard evidence that work in the night-time economy is frequently characterised by insecurity, with some employers relying on unpaid labour. Steve Garelick told the Committee that many people working within the night-time economy, such as bar staff, are frequently asked to perform additional duties at the end of a shift without pay.<sup>220</sup> Similarly, Dugald Johnson told the Committee that workers in the performing arts are frequently asked to work for free.<sup>221</sup> In its submission to the Committee's call for evidence, Equity stated that:

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<sup>217</sup> Written evidence submitted to the Economy, Culture and Skills Committee by Equity. Published alongside report.

<sup>218</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.20)

<sup>219</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 2\)](#), 24 July 2024 (p.9)

<sup>220</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.19)

<sup>221</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.20)

*"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."<sup>222</sup>*

There is further evidence to suggest that work agreements are frequently informal and, in some cases, do not involve a written contract. In its submission to the Committee's call for evidence, GMB stated that low-paid workers such as security staff often do not receive workplace benefits, such as paid holiday or pensions.<sup>223</sup> Steve Garelick told the Committee that it is not uncommon for workers to be unaware of their rights, as many of them are "atomised" and have little contact with other workers.<sup>224</sup>

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*"Performing arts workers, actors, are told all the time that this is the art, it is all about the art. Well, it may be art, but it is also work, and there are plenty of people who are making money out of it"<sup>225</sup>*

### **Dugald Johnson, Policy Officer Equity**

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Evidence heard by the Committee suggests that informal work arrangements are also common in the performing arts. In its submission to the Committee's call for evidence, Equity states that some workers, such as drag artists, often work for a fee agreed on the night, often not discussed prior to performance and without a written contract detailing particulars of their work.<sup>226</sup> Dugald Johnson raised that labour market enforcement in the sector was an issue, referring to the UK's number of labour market enforcement officers, which stands at 0.29 per 10,000 workers, short of the International Labour Organisation's benchmark of 1 per 10,000 workers.<sup>227</sup>

There is further evidence showing that zero-hours contracts, whereby workers are not provided with guaranteed hours, are particularly common across the night-time economy. The Work Foundation found that, between 2022 and 2023, the number of workers on zero-hour contracts has grown by roughly 11 per cent, with the hospitality sector being one of the main drivers.<sup>228</sup> As of 2022, one in three people working in hospitality were in "severely insecure work" as defined by the Work Foundation (involuntary part-time and involuntary temporary forms of work).<sup>229</sup>

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<sup>222</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.19)

<sup>223</sup> Written evidence submitted to the Economy, Culture and Skills Committee by GMB. Published alongside report.

<sup>224</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.17)

<sup>225</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.18)

<sup>226</sup> Written evidence submitted to the Economy, Culture and Skills Committee by Equity. Published alongside report.

<sup>227</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 5 – London's Night-time Economy part 2 \(panel 1\)](#), 24 July 2024 (p.19)

<sup>228</sup> Work Foundation, [The UK Insecure Work Index 2024](#), February 2024 (pp.5,7)

<sup>229</sup> Work Foundation, [The UK Insecure Work Index](#), May 2022 (p.6)

We heard that many night-time venues rely on zero-hours contracts due to the nature of their business. Joan Moynihan from Nimax Theatres told the Committee that such contracts are often used “as a way of introducing new skills into the industry with people who do not have experience”.<sup>230</sup> Additionally, Joan Moynihan and Simon Tracey stressed that such contracts offer flexibility, which is valued by some workers, such as those who are students or have caring responsibilities.<sup>231</sup> Simon Tracey added that zero-hours contracts help businesses adjust to fluctuating demand.<sup>232</sup>

However, whilst zero-hours contracts may be appropriate for workers in certain circumstances, there is also evidence to suggest that they can have a detrimental effect on workers. In its written evidence, Equity stated that flexibility was important for members, zero-hours contracts provide “one-sided flexibility at the expense of the worker” as they do not provide workers with a minimum level of security of income.<sup>233</sup> Results from a 2024 survey by the Trades Union Congress (TUC) show that 84 per cent of workers on zero-hours contracts would rather have guaranteed hours.<sup>234</sup>

The Mayor has committed to never use zero-hours contracts at the GLA and to campaign to “end and prevent the exploitation of workers through zero-hours contracts”.<sup>235</sup> The Committee also notes the Government’s commitment to “ban exploitative zero-hours contracts” as part of the Employment Rights Bill, which is currently being debated in Parliament.<sup>236</sup> This will include a “right to guaranteed hours” for workers who have worked regular hours during an initial “reference period” (probably 12 weeks) and a “right to notice of shifts”, meaning that workers should receive “reasonable notice” of shift times, changes and cancellations.<sup>237</sup> The Committee supports measures designed to address exploitation in the workplace, and we will wait to see how the Government’s proposed reforms impact workers and businesses in the night-time economy.

## Recommendation 18

**The Mayor, the Night Time Industries Association and other industry bodies should promote the Good Work Standard to night-time economy businesses.**

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<sup>230</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.5)

<sup>231</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (pp.5,9)

<sup>232</sup> London Assembly Economy, Culture and Skills Committee, [Transcript of agenda item 10 – London’s Night-time Economy part 1 \(panel 1\)](#), 24 July 2024 (p.11)

<sup>233</sup> Written evidence submitted to the Economy, Culture and Skills Committee by Equity. Published alongside report.

<sup>234</sup> TUC, [Over 8 in 10 zero-hours contract workers want regular hours – TUC poll reveals](#), 30 August 2024

<sup>235</sup> London Assembly, [MQT 2016/4011](#), 19 October 2016

<sup>236</sup> Gov.uk, [What does the Employment Rights Bill mean for you?](#), 10 October 2024

<sup>237</sup> House of Commons Library, [Employment Rights Bill 2024-25](#), 23 October 2024

## Appendix – Minority report

**Neil Garratt AM considers that this Report should have taken into account other available information from Assembly Member Emma Best, who published a report that was relevant to this topic titled *Fixing London's Nightlife*.<sup>238</sup>**

The publication of AM Best's report in October 2024 followed an industry-led roundtable and evidence gathering session which was held at City Hall in July 2024. Stakeholders who participated in this work included: Michael Kill – Night-Time Industries Association, Jo May – Soho Business Alliance, Stephen Howell – Premium Security, Steven Braines – He.She.They, Simon Fell – Alexandra Palace & Park, Rob Star – Star Pubs, Luke Black – Nightlife Commentator and Emily Fielder – Adam Smith Institute.

During a meeting of the Economy, Culture and Skills Committee on 9 December 2024, Assembly Member Best provided the following statements:

*"At the beginning of this year I started working with industry experts and our team here at City Hall to look at how we can investigate this further, and come up with something that was hopefully cross party, and definitely industry led. [...] There's no point me sitting here and lecturing people in the industry on how we improve this, especially at a time when they feel the political leadership is lacking in London on this issue."*

*"It was really important that we also focused on not complaining about the situation, not trying to score points about whose fault what was, just looking at the solutions and how best we can get there. [...] So everything that we've come up here [are] things that [industry stakeholders] have endorsed and things that they want to see us as politicians leading from in London. Some of the recommendations here that we've highlighted in the [motion](#) are creating a £6 million nighttime prosperity fund for boroughs to tell us what they need to make their nightlife thrive and submit bids to make it happen [...] and a commission of women's safety, [given] GLA's own data showing 68 per cent of women worry about harassment on the tube, and 74 per cent worry about their safety at night time."*

*"I hope you will be taking some of these recommendations forward. You'll have heard how London is struggling in comparison to places like Liverpool and Manchester, [...] and hopefully we are all on the same page."<sup>239</sup>*

<sup>238</sup> City Hall Conservatives, [Fixing London's Nightlife: Industry-led Solutions](#), 3 October 2024

<sup>239</sup> London Assembly, [Economy, Culture and Skills Committee](#), 9 December 2024

## Committee Activity

### Committee meetings

The Committee held two meetings to examine London's night-time economy. The Committee's first meeting took place on 24 July 2024 and explored the impact of current economic challenges, such as high inflation and cost of living pressures, on London's night-time businesses. It also examined night-time licensing in London and the challenges faced by London's LGBTQ+ venues and grassroots music venues. The meeting was attended by the following guests:

- **Sophie Brownlee**, External Affairs Manager, Music Venue Trust
- **Prof. Ben Campkin**, Professor of Urbanism and Urban History, University College London
- **Cllr. Sabrina Francis**, Cabinet Member for Jobs, Young People and Culture, Camden Council
- **Michael Kill**, Chief Executive, Night Time Industries Association
- **Joan Moynihan**, Executive Director, Nimax Theatres
- **Simon Tracey**, Group Chief Executive Officer, Broadwick Live
- **Mark Williams**, Deputy Chief Executive, Heart of London Business Alliance

The Committee's second meeting was held on 4 September 2024 and focused on working conditions and pay within London's night-time economy, as well as on discrimination within night-time licensing. As part of this meeting the Committee also examined the work of the Mayor and the Greater London Authority as it relates to the night-time economy. The meeting was attended by the following guests:

- **Dr Charisse Beaumont**, Chief Executive and Co-Founder, Black Lives in Music
- **Paul Broadhurst**, 24-Hour London Manager, Greater London Authority
- **Howard Dawber**, Deputy Mayor for Business and Growth, Greater London Authority
- **Steve Garelick**, Regional Organiser, GMB
- **Dugald Johnson**, Policy Officer, Equity
- **Shonagh Manson**, Assistant Director of Culture, Creative Industries and 24-Hour London, Greater London Authority
- **Cllr. David Robson**, Licensing Sub-Committee Chair, Lambeth Council

### Call for evidence

The Committee also launched a call for evidence containing seven open-ended questions. The call for evidence closed on 6 September 2024 and received 11 submissions.

## Other formats and languages

If you, or someone you know needs this report in large print or braille, or a copy of the summary and main findings in another language, then please call us on: 020 7983 4100 or email [assembly.translations@london.gov.uk](mailto:assembly.translations@london.gov.uk)

### Chinese

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Email 与我们联系。

### Vietnamese

Nếu ông (bà) muốn nội dung văn bản này được dịch sang tiếng Việt, xin vui lòng liên hệ với chúng tôi bằng điện thoại, thư hoặc thư điện tử theo địa chỉ ở trên.

### Greek

*Εάν επιθυμείτε περίληψη αυτού του κειμένου στην γλώσσα σας, παρακαλώ καλέστε τον αριθμό ή επικοινωνήστε μαζί μας στην ανωτέρω ταχυδρομική ή την ηλεκτρονική διεύθυνση.*

### Turkish

Bu belgenin kendi dilinize çevrilmiş bir özetini okumak isterseniz, lütfen yukarıdaki telefon numarasını arayın, veya posta ya da e-posta adresi aracılığıyla bizimle temasa geçin.

### Punjabi

ਜੇ ਤੁਸੀਂ ਇਸ ਦਸਤਾਵੇਜ਼ ਦਾ ਸੰਖੇਪ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਲੈਣਾ ਚਾਹੋ, ਤਾਂ ਕਿਰਪਾ ਕਰਕੇ ਇਸ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਉਪਰ ਦਿੱਤੇ ਡਾਕ ਜਾਂ ਈਮੇਲ ਪਤੇ 'ਤੇ ਸਾਨੂੰ ਸੰਪਰਕ ਕਰੋ।

### Hindi

यदि आपको इस दस्तावेज का सारांश अपनी भाषा में चाहिए तो उपर दिये हुए नंबर पर फोन करें या उपर दिये गये डाक पते या ई मेल पते पर हम से संपर्क करें।

### Bengali

আপনি যদি এই দলিলের একটা সারাংশ নিজের ভাষায় পেতে চান, তাহলে দয়া করে ফো করবেন অথবা উল্লেখিত ডাক ঠিকানায় বা ই-মেইল ঠিকানায় আমাদের সাথে যোগাযোগ করবেন।

### Urdu

اگر آپ کو اس دستاویز کا خلاصہ اپنی زبان میں درکار ہو تو، براہ کرم نمبر پر فون کریں یا مذکورہ بالا ڈاک کے پتے یا ای میل پتے پر ہم سے رابطہ کریں۔

### Arabic

الوصول على ملخص لهذا المستند بلغة،  
فرجاء الاتصال برقم الهاتف أو الاتصال على  
العنوان البريدي العادي أو عنوان البريد  
الإلكتروني أعلاه.

### Gujarati

જો તમારે આ દસ્તાવેજનો સાર તમારી ભાષામાં જોઈતો હોય તો ઉપર આપેલ નંબર પર ફોન કરો અથવા ઉપર આપેલ ટપાલ અથવા ઇ-મેઇલ સરનામા પર અમારો સંપર્ક કરો.

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