Aspects Of London’s Evening And Night Time Economy

A Report for the Mayor of London/ GLA

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A Report Into Aspects of London’s Evening And Night-time Economy

About This Report

This is a report on the scale and importance of London’s Evening and Night Time Economy that was commissioned by the Greater London Authority, April 2016.

Reporting to the London Night Time Commission, this research study provides a snapshot of London’s evening and night-time economies. It scrutinises the regulatory policies of licensing and planning, investigates crime and anti-social behaviour and drills down into the economic contribution of night-time activities.

These outputs helped inform and shape the Greater London Authority’s policy and vision of London as a 24-hour City - 24-hour London – and subsequent publication, From Good Night to Great Night: A Vision For London as a 24-hour City.

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1. Summary Findings

This research study provides a snapshot of London’s evening and night-time economies. It scrutinises the regulatory policies of licensing and planning, investigates crime and anti-social behaviour and drills down into the economic contribution of night-time activities. The London Night Time Commission requested facts and findings rather than recommendations. This report, then, is unconventional in that it has many bullet points, notes and summaries and covers a range of different types of findings.

The findings demonstrate many positive aspects of the evening and night-time economies. The economic contribution is a good news story, not only for the West End, but for the inner urban borough of Lambeth, too. Although all violent crime is to be abhorred, when crime figures are examined in detail for two ‘hot spots’, it would appear that the problems of crime associated with the night-time economy bear comparison with the daytime. At a policy level, in licensing and planning, there are statements to support night-time activities. The positive impacts of a vibrant nightlife can be seen in Brixton, where partnership working between the local authority, the police and other agencies has resulted in economic growth and support for diverse stakeholders and customers in the creative and hospitality sectors. This expansion demonstrates the potential that other boroughs could aspire to.

On a more negative note, closer scrutiny within the hotspots illustrates how much more work needs to be put into licensing enforcement and policing if it is to work with the night-time economy rather than against it. Premises owners and managers have to cope with sometimes inconsistent and heavy-handed regulation, particularly where music and dancing are concerned. Running premises after midnight is particularly problematic.

This fragility is amplified by development pressures, which come in different forms, from rent hikes to changes of use. Nevertheless, despite all these difficulties, there are examples of successful operations and imaginative entrepreneurs. London’s evening and night-time economy is healthy but more nurturing and preventative measures are called for if it is to be sustained and allow opportunities to grow.

The report is structured as follows: Section 1 provides an overview of key findings, followed by recommendations; Section 2 explains the sources of evidence; Sections 3-8 set out a study of policies and the economic performance of the evening and night-time economies (ENTE) in four boroughs (Croydon, Lambeth, Waltham Forest, Westminster). Sections 8, 9 & 10 investigate two ENTE ‘hotspots’, Brixton and Croydon town centres.

1.1 Development Pressures

1. Planning policy encourages ENTE activities to locate in town centres;

2. The housing shortage and high rents for commercial property have increased the competition for space in town centres. Two examples of these pressures impacting on the ENTE come from LB Lambeth where the Royal Vauxhall Tavern and Club 414 are both currently the subject of planning applications for redevelopment for mixed use, including residential. Both venues are iconic and enjoy support across London from their customers and performers;

3. Other venues have been demolished to make way for new infrastructure, Crossrail in Westminster being a case in point.
1.2 Synergies Within ENTE And With Other Land Uses

1. Planning policy documents note cafés and restaurants, which have daytime as well as night-time use, help to support retail;

2. Our interview material provides evidence of the synergy between major night-time uses, such as gigs in large performance spaces and smaller local pubs, cafés, restaurants and bars. While this relationship is well known and used as a justification for subsidising major arts facilities, the relationship between specific types and sizes of night-time venues is less well documented.

1.3 Licensing

1. There is evidence of inconsistency in licensing practice and in the policing of night-time town centres. There is a serious issue in terms of its impact on some licensed premises and the reputation of a major town centre;

2. Statements of licensing policy vary in their promotion of the ENTE, but we have found examples of the positive benefits of a vibrant NTE being explicitly acknowledged;

3. Licensing still operates as a separate system from planning and economic development within local authorities;

4. Evidence of support for a more integrated and holistic approach to licensing practice has been identified;

5. There is evidence of some good practice of consultation and dialogue between stakeholders, but this needs to be further embedded;

6. Statements of licensing policy, decisions of licensing sub-committees and interview material all point to a heavy burden of conditions being placed on licensed premises holders.

1.4 Crime

1. The commentary on crime is based on an analysis of Met. Police crime figures and Local Ambulance Service (LAS) callouts for Brixton and Croydon town centres or hotspots, collated over a year;

2. The most notable increases in offences between the hours of 10pm and 6am are for offences against the person, theft and handling offences, and drugs offences;

3. However, based on existing research and policy, the increases seem less profound than might be expected. The difference between the peak times for violence against the person offences - 4pm and 2am - was less considerable than might have been expected, particularly in Brixton;

4. Levels of drugs offences increased over the course of the evening between the hours of 7pm and 1am, before sharply decreasing;

5. London Ambulance Service (LAS) drug overdose data did not suggest a correlation with the NTE (peaking at 4pm - 6pm see Figure (4)).
6. There is a weaker association with the NTE in respect of assaults, according to the LAS data, although the relationship is more pronounced in Brixton than in Croydon, where a peak of 39 assaults (totaled across the year) between 12am and 2am can be contrasted with a daytime peak of 18 (4 to 6pm). Just over 30 per cent of call outs for assaults (71) occurred between the hours of 10am and 8pm, whilst just less than 59 per cent occurred between the hours of 8pm and 6am (139). In Croydon, call outs related to assaults were more evenly distributed throughout the day, peaking at 41 between 8 and 10pm compared with a daytime peak of 29 (2 to 4pm) (Figures 2 and 3);

1.5 Economic Impact

There is no such thing as a standard ENTE and fostering strategies of improvement need to factor in the diversity of impact that an ENTE may have at local and national economic levels. ENTE activities at a national level usually exceed Tourism in terms of market size.

1. Internationally, the London ENTE needs to focus on adding to our strengths. This study adds to the evidence that our strengths are based in the West End of London;

2. The Night Tube improves the infrastructure platform for the management of late night crowds; the movement of employees; the flexibility of service provision but only the encouragement of new enterprise will optimise this investment in the infrastructure;

3. Nationally, London can show leadership in the way in which it encourages diversity through a wider leisure offer to deliver improved prospects for employment and strengthen communities. Brixton is a relevant example of this in this study,

ENTE plays a very different role in each of the four boroughs investigated:

1. Westminster contains possibly the largest and most densely concentrated ENTE in the western world and this includes cities such as New York and Paris. Thus its scale of activities and the demands placed upon its public services are of a completely different magnitude to the other three places;

2. Lambeth is in many respects a complementary part of the services available in the West End since it contains the South Bank as well as the more individual character of the Brixton ENTE which is not part of the interconnected leisure chain through Lambeth to Westminster and Camden;

3. Croydon has a much smaller ENTE and it was clear in the wider study, of which this forms part, that it currently lacks the underlying population dynamics which give rise to the special circumstances that lead to the development and concentration of major ENTE centres;

4. Waltham Forest has a nascent ENTE presence when compared to the other three places.

1.6 Recommendations

Our findings in carrying out the empirical research for this report, together with our combined experience of research into night time economy issues, have led us to make the following recommendations:

---

1 See TBR research studies in New Zealand, Australia and the United Kingdom
1. Licensing authorities should be encouraged to spell out the positive benefits of the night time economy for local economies and to the wider public culture in their statements of licensing policy.

2. More protection needs to be offered to ‘assets of community value’, such as performance venues and local pubs. These could also be categorised as ‘sui generis’ in planning use-value terms making it harder for their use to be changed.

3. Local planning and licensing authorities should be encouraged to take a more holistic approach to the night time experiences offered by their jurisdiction.

4. Institutionalised learning of administrative and operational arrangements and management of the ‘night’ needs to be transferred across London.

5. Further research is also needed into the following:
   a. Data on footfall and movement in the hours after dark, disaggregated by gender and other attributes of difference;
   b. Detailed data on night time revenue for the evening and night time economy
   c. Study of the impact of different policing strategies on night time behaviour

2. Narrative

We were directed by the Commission to make comparisons between four local authority areas: Croydon, Lambeth, Waltham Forest and Westminster. This was followed up by a more detailed investigation of two ‘hotspots’ for the ENTE outside of the West End: Brixton and Croydon town centres.

The team gathered the following evidence from the following publicly available sources:

Licensing Sub-Committee minutes from the London Boroughs of Croydon, Lambeth, Waltham Cross and Westminster City Council;

Planning policy documents and associated reports from the four boroughs and the Mayor of London with other documents relating to the management of the night-time economy (NTE).

The two ‘hot spot areas were defined by the team using information from Licensing Policy Statements, background reports and direct observation.

The team would like to thank the Metropolitan Police Data Service for their assistance in providing us with crime data for our two ‘hotspots’.

London Ambulance Service (LAS) also provided us with data.

The data provided by LAS on drug overdoses did not contain eastings and northings. Consequently our contact at the GLA was unable to geographically map the data specifically onto our two hot spot boundaries. The dataset did however include Output Area (OA) geographical points, so the relevant Output Area mapping layer was transposed onto the two town centre areas. The two layers did not match exactly, however, although Croydon was a closer fit than Brixton.

Uber provided us with maps of their journeys.

Transport for London released the spreadsheets produced by their October 2015 ‘hackathon’ from which we were able to extract entry and exit data to Brixton underground (Section 8.3).
We are grateful to the individuals in Brixton and Croydon who gave up their time for interviews that yielded some unexpected insights and regret that we were unable to secure an interview with Croydon’s Police Licensing team.

Our data-mining activities were stymied by the disparate nature of sources, as did issues of confidentiality and the different formats in which that data is held. Even when access is offered, obtaining data that covers the appropriate geographical area and covers the night-time period normally requires direct conversations between the frontline staff involved in data analysis and the researcher. Given the limitations of time and resources, this constraint limited our study.

Because of the need for precision with regard to crime and anti-social behaviour, data analysis and commentary has focused on Brixton and Croydon town centres, our two ‘hotspots’.

TBR’s economic analysis was conducted as a separate sub-contract and while the lead authors have extracted some of their data for ease of reading in the main report, TBR’s full report including their methods statements may be made available on request.

These statements include summary definition of the activities that are covered within Core and Non-Core ENTE which are consistently applied throughout this study. The activities as so described are drawn from the TBR Night Mix Index (NMI) – which has used this set of definitions in all its research on the ENTE since 2009.

Data in the NMI is mainly draw from the 30 year times series of annual firm level performance data that TBR has purchased over that time frame from Dun and Bradstreet.

There are no existing statistics that show the proportion of trade carried out by firms within a 24-hour cycle. Therefore, in the Night Mix Index, TBR rely upon the selection of firms’ activities to ensure that the core ENTE will not include businesses that in fact mainly depend on any form of daytime trade. For this reason TBR put all retailing except liquor retailing into Non-Core. TBR also put all overnight accommodation into Non-Core since most of its employment is daytime, and many of the users will not be ENTE users. All travel is in Non-Core for similar reasons. All travel, policing and hospital services are described as Non-Core.

To be a part of the core ENTE a business activity must provide a direct leisure related service to a member of the public and its main activity and its service profile must be mainly evening or night time related.

The important point is that a consistent activity profile is maintained for each category and that TBR does not over estimate the size of ENTE

3. Borough Comparisons Economic Summary

Note that the ENTE plays a very different role in each of these boroughs.

On the four main output measurements in Table 1, the Westminster ENTE is on a completely different scale.

If we focus simply on sales revenue in 2015, the three Westminster Core ENTE sub sectors total £3.6 billion whilst Croydon is £382 million, Lambeth £509 million and Waltham Forest £194 million.
Table 1: Size of the Core ENTE in the four boroughs (2015 data unless stated otherwise)

<table>
<thead>
<tr>
<th>Borough</th>
<th>NTE Activity</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
<th>GVA (£m)</th>
<th>Productivity (£k/emp)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croydon</td>
<td>Drink</td>
<td>290</td>
<td>1,800</td>
<td>102</td>
<td>39</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>100</td>
<td>870</td>
<td>71</td>
<td>21</td>
<td>24</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>1,045</td>
<td>4,750</td>
<td>209</td>
<td>109</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>1,435</td>
<td>7,420</td>
<td>382</td>
<td>169</td>
<td>23</td>
</tr>
<tr>
<td>Lambeth</td>
<td>Drink</td>
<td>375</td>
<td>2,580</td>
<td>150</td>
<td>56</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>135</td>
<td>1,320</td>
<td>161</td>
<td>54</td>
<td>41</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>940</td>
<td>4,750</td>
<td>198</td>
<td>118</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>1,450</td>
<td>8,650</td>
<td>509</td>
<td>227</td>
<td>26</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>Drink</td>
<td>180</td>
<td>860</td>
<td>48</td>
<td>19</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>65</td>
<td>300</td>
<td>30</td>
<td>12</td>
<td>41</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>715</td>
<td>2,640</td>
<td>116</td>
<td>60</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>960</td>
<td>3,800</td>
<td>195</td>
<td>90</td>
<td>24</td>
</tr>
<tr>
<td>Westminster</td>
<td>Drink</td>
<td>1,235</td>
<td>12,230</td>
<td>712</td>
<td>277</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>525</td>
<td>11,450</td>
<td>1,349</td>
<td>366</td>
<td>32</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>3,190</td>
<td>34,320</td>
<td>1,495</td>
<td>824</td>
<td>24</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>4,950</td>
<td>58,000</td>
<td>3,556</td>
<td>1,467</td>
<td>25</td>
</tr>
</tbody>
</table>

Source: TBR Observatory PN01416R, analysis W1.

Table 2 (p10) drives home the comparative size of the ENTE related Supply Chain in each of the four boroughs.

Again, the relative size of the Westminster ENTE Supply Chain is especially illustrated by the relative value of its firm number, employment figures and sales turnover.

Waltham Forest sales revenue from the Non-Core ENTE supply chain is c50% of either Croydon or Lambeth. We see in later detailed figures that Lambeth has developed a relatively diverse ENTE and the supply chain values help to deliver this, but so does its proximity to the West End and the South Bank.

Although Croydon has more supply chain firms than Lambeth or Waltham Forest it is clear that the Lambeth firms are of larger average size and deliver higher employment and sales revenue.
Table 2: Size of the Non-Core ENTE in the four boroughs (2015 data unless stated otherwise)

<table>
<thead>
<tr>
<th>Borough</th>
<th>NTE Activity</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
<th>GVA (£m)</th>
<th>Productivity (£k/emp)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croydon</td>
<td>Non-Core ENTE</td>
<td>2,515</td>
<td>15,520</td>
<td>1,531</td>
<td>531</td>
<td>34</td>
</tr>
<tr>
<td>Supporting</td>
<td></td>
<td>285</td>
<td>8,090</td>
<td>589</td>
<td>321</td>
<td>40</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>2,800</td>
<td>23,610</td>
<td>2,120</td>
<td>852</td>
<td>36</td>
</tr>
<tr>
<td>Lambeth</td>
<td>Non-Core ENTE</td>
<td>1,995</td>
<td>13,190</td>
<td>1,241</td>
<td>485</td>
<td>37</td>
</tr>
<tr>
<td>Supporting</td>
<td></td>
<td>180</td>
<td>10,280</td>
<td>887</td>
<td>381</td>
<td>37</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>2,175</td>
<td>23,470</td>
<td>2,128</td>
<td>866</td>
<td>37</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>Non-Core ENTE</td>
<td>1,705</td>
<td>8,440</td>
<td>829</td>
<td>291</td>
<td>34</td>
</tr>
<tr>
<td>Supporting</td>
<td></td>
<td>135</td>
<td>4,350</td>
<td>276</td>
<td>172</td>
<td>39</td>
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<tr>
<td>Total</td>
<td></td>
<td>1,840</td>
<td>12,790</td>
<td>1,105</td>
<td>463</td>
<td>36</td>
</tr>
<tr>
<td>Westminster</td>
<td>Non-Core ENTE</td>
<td>7,800</td>
<td>91,470</td>
<td>13,632</td>
<td>4,825</td>
<td>53</td>
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<tr>
<td>Supporting</td>
<td></td>
<td>1,170</td>
<td>26,120</td>
<td>2,022</td>
<td>1,039</td>
<td>40</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>8,970</td>
<td>117,590</td>
<td>15,654</td>
<td>5,864</td>
<td>50</td>
</tr>
</tbody>
</table>

Source: TBR Observatory PN01416R, analysis W1.

Table 3 (p10) illustrates ENTE businesses are generally more useful to the local economy and communities in generating proportionally larger numbers of enterprise and employment opportunities.

Table 3: Percentage Contribution of Core ENTE to the whole economy in the four boroughs

<table>
<thead>
<tr>
<th>Borough</th>
<th>ENTE</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croydon</td>
<td>Drink</td>
<td>1.40%</td>
<td>1.20%</td>
<td>0.30%</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>0.50%</td>
<td>0.60%</td>
<td>0.20%</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>4.90%</td>
<td>3.10%</td>
<td>0.70%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>6.80%</td>
<td>4.90%</td>
<td>1.20%</td>
</tr>
<tr>
<td>Lambeth</td>
<td>Drink</td>
<td>2.30%</td>
<td>1.80%</td>
<td>0.40%</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>0.80%</td>
<td>0.90%</td>
<td>0.50%</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>5.70%</td>
<td>3.30%</td>
<td>0.60%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>8.80%</td>
<td>6.00%</td>
<td>1.50%</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>Drink</td>
<td>1.50%</td>
<td>1.20%</td>
<td>0.50%</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>0.50%</td>
<td>0.40%</td>
<td>0.30%</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>5.80%</td>
<td>3.80%</td>
<td>1.10%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>7.80%</td>
<td>5.40%</td>
<td>1.90%</td>
</tr>
<tr>
<td>Westminster</td>
<td>Drink</td>
<td>1.60%</td>
<td>1.30%</td>
<td>0.20%</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>0.70%</td>
<td>1.20%</td>
<td>0.50%</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>4.10%</td>
<td>3.60%</td>
<td>0.50%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>6.40%</td>
<td>6.10%</td>
<td>1.20%</td>
</tr>
</tbody>
</table>

Source: TBR Observatory PN01416R, analysis W1.
Table 4 (below) strikingly shows that percentage-wise, Westminster depends least on the ENTE as a Borough for both employment and sales revenue.

The challenge to the other three Boroughs is to add to their economic strength by broadening their sector appeal since this will drive further growth in the ENTE whilst percentage dependency will reduce.

### Table 4: Contribution of Non-Core ENTE to the whole economy in the four boroughs

<table>
<thead>
<tr>
<th>Borough ENTE</th>
<th>Non-Core ENTE</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croydon</td>
<td>Indirect</td>
<td>12%</td>
<td>10.00%</td>
<td>5.00%</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>1%</td>
<td>5.20%</td>
<td>1.90%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>13.00%</td>
<td>15.20%</td>
<td>6.90%</td>
</tr>
<tr>
<td>Lambeth</td>
<td>Indirect</td>
<td>12%</td>
<td>9.20%</td>
<td>3.50%</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>1%</td>
<td>7.20%</td>
<td>2.50%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>13.00%</td>
<td>16.40%</td>
<td>6.00%</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>Indirect</td>
<td>14%</td>
<td>12.20%</td>
<td>8.10%</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>1%</td>
<td>6.30%</td>
<td>2.70%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>15.00%</td>
<td>18.50%</td>
<td>10.80%</td>
</tr>
<tr>
<td>Westminster</td>
<td>Indirect</td>
<td>10%</td>
<td>9.70%</td>
<td>4.70%</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>2%</td>
<td>2.80%</td>
<td>0.70%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>12.00%</td>
<td>12.50%</td>
<td>5.40%</td>
</tr>
</tbody>
</table>

Source: TBR Observatory PN01416R, analysis W1.

Table 4 (above) emphasizes the broad strength and depth of the Westminster economy and it flags the relative weakness of the Croydon NTE.

Percentages for the other boroughs are higher because the depth in range of business activities is lacking and as we know, from the other reported figures, the Westminster NTE operates on a much larger scale and in a much larger local economy.

### 4. Comparative Crime Data and Commentary

Please note this is a comparison between Brixton and Croydon Town Centres only.

The graphs support statements made in Section 1.0 Summary as well as the detailed comparison set out below.

When Brixton and Croydon town centres are analysed separately (see Figures 4 and 5), violence against the person offences in Croydon spike particularly markedly at 3am (just over 140 offences compared with 85 offences at 1am and 79 offences at 5pm – the next highest peaks). This was not the case in Brixton where VAP offences peaked at 5pm and were more consistent over the course of the 24-hour period.
LAS data suggested that Croydon’s NTE was associated with a much higher volume of ‘alcohol-related’ call outs between the hours of 8pm and 2am in particular (peaking at 80 incidents over the year between 12am and 2am compared with the highest daytime figure of 57, between 2 and 4pm). Alcohol-related incidents also spiked in Brixton between 12am and 2am (a peak of 54 totalled over the year between 12am and 2am compared with 32 between 4 and 6pm) (Figure 4).
Figure 3: London Ambulance Service Call Outs for assaults and ‘alcohol-related’ incidents, June 2015 - May 2016.

Source: London Ambulance Service (Appendix B: Combined Police & Ambulance Data)

Figure 4: London Ambulance call outs for drug overdoses June 2015 - May 2016.

Source: London Ambulance Service (Appendix B: Combined Police & Ambulance Data)
5. Licensing

Context

The Licensing Act 2003 (LA 2003) brought together various licensing regimes (alcohol, entertainment, cinemas, late night refreshment etc.) within the compass of the relevant licensing authority, usually the local authority. The licensing authority was required, under LA 2003 s4(1), to carry out its licensing functions with a view to promoting the four licensing objectives:

- The prevention of crime and disorder
- Public safety
- The prevention of public nuisance
- The protection of children from harm

All four elements are currently deemed to be of equal importance. The authority is also required to publish a statement of licensing policy (LA 2003 s5), and this must be reviewed at least every five years. As part of the process of determining its policy it must consult a variety of stakeholders.

Licensing Policy in the Four Boroughs

All of the Licensing Policies are broadly similar in content and structure. This is unsurprising given that the policy is predicated upon LA 2003 and Guidance issued under LA 2003 s182. That said, the guidelines are not absolute, and each of the policies differs in emphasis. This is underpinned by the approach outlined in the Guidelines at 1.9:

Section 4 of the 2003 Act provides that, in carrying out its functions, a licensing authority must ‘have regard to’ guidance issued by the Secretary of State under section 182. This Guidance is therefore binding on all licensing authorities to that extent. However, this Guidance cannot anticipate every possible scenario or set of circumstances that may arise, and as long as licensing authorities have properly understood this Guidance, they may depart from it if they have good reason to do so and can provide full reasons.

Table 5 (p15) details the Core Hours Policy and numbers of Cumulative Impact Zones in the four boroughs. A Cumulative Impact Zone (CIZ) is a small area designated by the Licensing Authority where an evidence base has been provided to suggest that further additions or extensions to licensed premises would detrimentally impact upon the four licensing objectives. CIZs are sometimes also referred to as Saturation Zones. Within these zones, new or extended premises can be allowed, but each applicant has to demonstrate that there will be no negative impacts.²

Table 5 also outlines general document details that further illustrate the contrasts across the documents in terms of length and dates on which the policies are in force and when review will take place.

² For further explanation see Woodhouse J (2015) Alcohol: Cumulative Impact Policies, briefing paper 07269, House of Commons Library.
Table 5: Comparisons between statements of licensing policies across the four Boroughs; Core Hours and CIZs

<table>
<thead>
<tr>
<th>Borough</th>
<th>Document Information</th>
<th>Core Hours Policy</th>
<th>Cumulative Impact Zones</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croydon</td>
<td>23pp + appendices Effective: 2/1/2014</td>
<td>Cases treated on individual merits; Generally permission not granted for licensable activities beyond: 23.30 Sunday to Thursday, 24.00 Fridays &amp; Saturdays. CC (2014) 5.4.7</td>
<td>Four in total. See Croydon Council (2014) 4.21 &amp; Appendix 3, 45, 6. NB. Special Saturation Policy Area (Croydon Town Centre) CC (2014) 4.18; presumption against granting new licences when representations on cumulative impact made</td>
</tr>
<tr>
<td>Lambeth</td>
<td>29pp + appendices Effective 30/1/2014</td>
<td>Preferred Hours – LBL (2014) Appendix 1 details approach broken down into type of location and activity. It is noted these are <strong>not absolute</strong> and a guide for applicants completing Operating Schedules. For Public Houses in centre or strategic cultural area: 02.00 Friday - Saturday, 01.00 Monday - Thursday, Sunday 00.00. For public houses in residential area: 23.00 daily.</td>
<td>ONE. Clapham High Street LBL (2014) 4.1 and Appendix 2</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>39pp + appendices Effective: 1/2011; Amended 19/4/2012 NB. New Policy currently out for consultation</td>
<td>Flexible approach and arbitrary restrictions avoided: ‘Fixed predetermined closing times for particular areas or zones will not form part of the council’s licensing policy as this could lead to a significant movement of people.</td>
<td>Two in total. See WF (2011) 7.2.5</td>
</tr>
</tbody>
</table>

---

3 All information taken from Licensing Statements and Policies in force Summer 2016.
As can be seen in Table 5 above, all have core hours policy apart from Waltham Forest\(^4\), which preferred a flexible approach in the 2011 iteration of its Policy, and others stressing that there is some flexibility built-in. All four boroughs have designated CiZs, although the size and number of each CiZ varies dramatically.

### 5.1 Croydon

Croydon policy (revised 02/01/14, 23pp + appendices) pays homage to the positive aspects of NTE, but less forcefully than Lambeth (see 4.3 below).

> Premises and events that are required to be licensed under the Licensing Act 2003 do currently, and will continue to, make an essential contribution to the economic and cultural development of the Borough, through the provision of entertainment, leisure facilities and employment. (1.5)

There are four CiZs (see Policy appendix 3,4, 5 and 6) but more importantly for this report’s purposes, Croydon town centre itself is party to a special saturation policy. The policy states that each application be looked at on its own merits but stresses favourable consideration should be given to encouraging more diverse types of premises. Interestingly, a rather different notion of diversity is envisaged here such as attracting and older clientele, encouraging live music, and supporting ‘cultural quarter’).

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\(^4\) Waltham Forest currently have a new policy out for consultation so it may be that this will change. This has not been considered here as this research was completed in August 2016.
5.2 Lambeth

Lambeth policy is interesting in that it stresses the positive benefits of the NTE throughout, e.g.

*It is the purpose of this policy to maintain Lambeth’s position as a vibrant place to visit and enjoy, with a wide choice of well managed venues providing entertainment and reflecting the cultural diversity of the Borough* (Prologue, p1)

*Recognising the important role which pubs and other licensed premises play in our local communities, and minimising the regulatory burden on business, encouraging innovation and supporting responsible premises* (p5)

But, that there is a balancing act is made clear:

*We are aware of the economic benefits of a busy night time economy as many of our residents are employed within the sector, but these have to be weighed against costs, including health and financial on residents and other businesses* (p6).

5.3 Waltham Forest

Waltham Forest’s policy also notes the broader positive benefit of NTE:

*The Council welcomes the powers in the Act and aims to use them in consultation with responsible authorities, licensees and the general public in a socially responsible way. The Council seeks to encourage and promote a broad range of entertainment, recognising the wider cultural benefits for local communities* (1.1.2).

5.4 Westminster

This is the largest of the documents we reviewed - 82 pages in length - and with added Glossary and some 62 pages of Appendices:

*We want to make sure that Westminster continues to offer a wide choice of high quality and well managed entertainment and cultural venues within a safe, orderly and attractive environment; valued by those who live here, work here and come to visit.*

The vision statement above neatly encapsulates the Westminster approach to licensing.

Cllr Nickie Aiken in the Foreword goes on to stress the need for balance, and that this should be applied in a fair and transparent manner. Further to this, the role of the Council as intermediary between local economy and residents is made clear; “Whilst continuing to promote the growth of the local economy we cannot allow the city to become a licence free – for-all, and conscious of our responsibilities to all sectors of the city we are an essential buffer to residential interest and concerns” (p3).

Borough Commander Peter Ayling stresses the usefulness of dialogue and collaboration with stakeholders as part of promoting licensing objectives (p5). Whilst the pre-eminence of the licensing objectives is stressed, it is noted that the revised guidance also supports other key aims and purposes, which are vitally important (1.3):
These include giving the police and licensing authorities powers to effectively manage the night time economy; recognising the important role that licensed premises play in local communities; reflecting the needs of local communities and making the most appropriate strategies for their local area; and encouraging greater community involvement and giving local residents the opportunity to have their say on decisions which may affect them. The council has shaped its policies very much in line with these aims.

The statement notes that the council has shaped its policy in line with these aims.

A high priority is given to developing a greater diversity of offerings, taking into account the age groups that might be attracted to them, and the balance to be struck between this and the concerns of the residents is explicit (1.3).

The desire for a less alcohol led premises is also writ large. In addition, the council sees licensing as a key means of controlling nuisance and anti social behaviour, and more broadly as but one part of a holistic approach to managing the NTE (1.11).

In terms of policy approach, in addition to the licensing objectives themselves, the Council will also consider

- Hours Policy
- Special policy on cumulative impact
- Policies that apply to specific licensable activities – reflects likely impact of activities and the desire to promote cultural/age diversity. (2.1.1)

The Licensing Statement spends some time outlining these. Council will consider alternative measures such as fixed/ staggered closing times, zoning, etc. (2.1.4). As regards hours, applications for hours within “core hours will generally be granted subject to them not being contrary to other policies, outside core hours they will be considered on merit with particular regards to issues such as possible adverse impact on local residents”; core hours detailed in 2.3.2. Interestingly they ask for applicants to show how persons are to depart from premises if applied hours are post midnight – the night tube may have effect here (2.3.3).
5.5 Analysis of Licensing Sub-Committee decisions

Table 6: Summary of Licensing Sub-committee decisions

<table>
<thead>
<tr>
<th>Decision/Authority</th>
<th>Croydon</th>
<th>Lambeth</th>
<th>Westminster</th>
<th>Waltham Forest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total No. licensed premises (approx.)</td>
<td>1000</td>
<td>Figure not available</td>
<td>3500</td>
<td>Figure not available</td>
</tr>
<tr>
<td>Total no. of sub-committee cases</td>
<td>14</td>
<td>42</td>
<td>133</td>
<td>13</td>
</tr>
<tr>
<td>Tot. No. licenses revoked</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Operating hours Extended</td>
<td>1 (until 3am)</td>
<td>2</td>
<td>10 (by one hour)</td>
<td>0</td>
</tr>
<tr>
<td>Operating hours reduced</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

Table 6 (above) summarises the outcomes of licensing cases covering on-licensed premises across the four Boroughs. Cases put before each Licensing Sub-Committee for the period March 2016 – April 2016 were scrutinized for each borough. These are non-routine applications made by different stakeholders. For example, they might be made by the Police to vary operating hours, or to revoke a licence; or by a licensee who wishes to extend their operating hours.

As can be seen from the figures from Croydon and Westminster, these cases comprise a small proportion of the total number of licensed premises in the boroughs.

The number involved in applying for or being subject to variations is small.

This suggests that the Core Hours as set out in the Statement of Licensing Policy are a powerful administrative device. Licensees are advised to contribute to the statutory consultation each authority has to carry out.

6. Planning & Management

6.1 London-wide Plan SPG (Supplementary Planning Guidance)

1. Policy 4.36 of the London Plan recognises that ‘London is a great city for night-time entertainment and socialising… The night-time economy also forms an important part of London’s economy’;

5 The research was carried out prior to the release of the Mayor of London’s draft SPG on Culture and Night Time Economy for consultation.
2. Policy 4.37 of the London Plan recommends an evidence-based approach on the part of local authorities to planning and management, coordinating stakeholders including residents, police and customers, integrating licensing and planning policies to avoid ‘unacceptable cumulative impacts (e.g. crime and anti-social behaviour, noise, litter);

3. The London Plan 4.37 urges local authorities to recognise and ‘address’ the opportunities and challenges posed by ENTE clusters in town centres throughout London. Table A.2.1 sets out the Plan’s definition of different town centres, based on their overall economic functions. This table includes a classification of the importance and reach of the NTE’s within London’s town centres;

4. Supplementary Planning Guidance (SPG) to the London Plan on Town Centres notes the positive contribution the ENTE can make but also points to the negative impacts. Section 1.2.13 notes that this is ‘particularly true for nightclubs, large drinking places, live music venues and late night takeaways, especially if there is a high density’;

5. Nevertheless, S 1.2.22 recognises the importance of live music venues and challenges they face from development pressures, local opposition to noise and other issues. Local authorities are urged to ‘enhance and protect live performance spaces, especially in areas of need’. They are also encouraged to consider demanding mitigation measures in new residential developments are proposed nearby existing live music venues (sometimes called ‘agents of change policy);

6. S.1.2.19 recognises the social role of pubs and suggests local authorities can use Article 4 directions to help save them from closure. They can also be recognised as Community Assets. N.B. LB Wandsworth has just issued Article 4 directions covering a large number of pubs in its borough, the most extensive use of an Article 4 direction to-date;

7. This use of planning policies to assist in preventing pubs and live music venues from closure is reiterated in the SPG for the Central Activities Zone or CAZ (the area of central London covering all of the City of London, the central portion of Westminster and the central parts of the surrounding inner London boroughs). This SPG also recommends local councils adopt ‘tailored planning policies’;

8. The SPG on Town Centres provides two useful checklists in its appendices: one of partners for involvement in planning and managing the ENTE and the other a checklist for integrated management of the ENTE. These provide guidance for good practice in managing the ENTE and build on previous documents produced for the GLA.

6.2 Local Planning Policies: Croydon

1. The Mayor of London and LB Croydon have worked together to prepare an Opportunities Area Framework to serve as strategic document to guide development in and surrounding Croydon Town Centre. This document notes that the concentration of restaurants, cafes and night-time uses in the South End is a successful mix and provides a point of entry into the town centre.

2. Croydon Local Plan Strategic Policies policy SP3.8 promotes and supports ENTE uses in Croydon Metropolitan Centre, District Centre and Local Centres. Notes the potential for the use of vacant properties;
3. Para 4.33 of the above document notes that Croydon has been good at producing creative talent, from the Brit School and the borough was the originator of dubstep, but it has been less good at providing a base for the nurturing of performance and talent - other outer London boroughs have been more successful;

4. Para 4.40 Croydon will adopt a flexible approach to ENTE uses in its centre. It will bring the centre in line with a change in hierarchy of ENTE uses in town centres as set out in the London Plan which designates Croydon as a ‘strategic cluster of night-time activity with regional/sub-regional importance’;

5. Croydon’s core strategies have been supported by a report on Croydon’s creative industries.

Specialist Management Bodies and Schemes: Croydon

- Croydon Pubwatch
- Croydon Street & School Pastors
- Business Improvement Districts (BIDs)
  - Croydon (Croydon):
  - New Addington (New Addington)
  - Purley BID (Purley in Croydon)

6.3 Local Planning Policies: Lambeth

1. Lambeth commissioned a specialist study to inform its ENTE policies and provide an evidence base;

2. Lambeth Local Plan (ED7) encourages ENTE uses mainly in town centres but only where there is no harm to residential uses;

3. The Local Plan notes that the ENTE has brought ‘investment and vitality’ to Clapham High Street, Brixton and Vauxhall, which were previously struggling;

4. Policy ED8 supports the retention of pubs and notes there will be a high evidence bar before accepting applications for change of use or redevelopment;

5. Lambeth has produced Supplementary Planning Documents (SPD) for Brixton Town Centre, Vauxhall and Waterloo;

6. Brixton’s SPD:
   a. Elaborates Lambeth’s Core Strategy for Places and Neighbourhoods which includes enhancing the town centre’s popularity for leisure, entertainment and nightlife including support for provision of theatre and other entertainment venues;
   b. Quotes a resident saying ‘don’t make it another clean and tidy town centre’;
   c. Lists a range of leisure and evening uses and a bustling night-time economy as positive assets;
d. Notes the emergence of Brixton’s visitor evening and night-time economy as one of the centre’s key successes, located across the centre and focused around key attractions such as the Ritzy cinema and the O2 Academy live performance venue;

e. Notes Brixton’s reputation as a high profile destination for live music;

f. Identifies the dance floor of the Electric (previously the Fridge) as a key amenity;

7. Vauxhall’s SPD:

a. States predominately LGBTQ ENTE centred in railway arches at Vauxhall Cross gives the centre character and energy and is a rival to the evening economy of Soho;

b. Discusses challenge as centre expands with new shopping and residential accommodation. Management regimes will ensure that the evening economy will continue to be a part of this growing residential community…the new retail centre will ‘complement the success of Vauxhall’s evening economy’;

c. The Royal Vauxhall Tavern and the Eagle pub are identified as cultural assets.

Specialist Management Bodies and Schemes: Lambeth

- Street Pastors: Lambeth Street Pastors (patrol Brixton, Lambeth and Streatham). Also appears to be a separate Brixton Street Pastors scheme, funded by the Brixton BID.
- Best Bar None (Clapham)
- Safer Lambeth Business Crime Reduction Partnership
- Business Improvement Districts (BIDs)
  - Brixton Hospitality and NTE Workshop, managed by the Brixton BID, in 2015.
  - Clapham (This is Clapham)
  - Streatham (inStreatham):
  - Vauxhall (Vauxhall One):
  - Waterloo (We are Waterloo)

6.4 Local Planning Policies: Waltham Forest

1. Waltham Forest Core Policies describes ‘the booming evening economy in Walthamstow’, with its restaurants, cafes and pubs (S3.7, p26);

2. Notes the Borough’s town centres have a high provision of food and drink uses, particularly of takeaways. Identifies the opportunity to improve the quality, especially in designated centres and parades. The observation about the poor quality of restaurants was supported by a study in 2009, which found that many residents chose to go into neighbouring boroughs or central London for entertainment;

3. Walthamstow Town Centre Area Action Plan seeks to expand its entertainment (theatre), cultural, restaurant and café provision;

4. Waltham Forest has an SPD to support retention of its pubs. It sets out a higher level of policy guidance and tests for determining applications for change of use or redevelopment.
Specialist Management Bodies and Schemes: Waltham Forest

- Pubwatch since 2014.
- **Business Improvement Districts (BIDs)**
  - Leytonstone Town Centre (E11)
  - Argall Industrial Estate (Argall Avenue)

6.5 Local Planning Policies: Westminster

1. Westminster City Council (WCC) has amassed a strong evidence base for its ENTE policies through a series of commissioned studies (see Appendix F: Planning and Management References);

2. Westminster City Council’s City Plan has as a strategic objective to build on its role as a world-class city, including its ‘internationally renowned…entertainment’. The Plan comments that the Council has 38 theatres, 60 cinema screens, four concert halls with a combined capacity for over 50,000 people, nearly 500 pubs and wine bars, 1,000 licensed restaurants, 136 nightclubs and dance venues and 20 casinos within its jurisdiction;

3. 36% of all Westminster’s licensed premises lie in less than 6% of its area. The ‘insatiable demand for floor space in the CAZ’ must be balanced with a mix of uses and the needs of its 21,000 residents;

4. WCC has designated three ‘stress areas’ the West End (WESA), Edgware Road and Queensway. WCC will only allow new entertainment uses in the WESA if they are small-scale, low impact and will not result in an increased concentration of late night uses’ (p.50);

5. Policy S24 states that ‘New large-scale late night entertainment uses of over 500 sq. m. floor space will not generally be appropriate in Westminster.’

6. The Plan recorded evidence from the Metropolitan Police gathered in 2012 that over half the recorded crime occurs in specific parts of the West End and St James’s wards (in the WESA).

Specialist Management Bodies and Schemes: Westminster

- Pubwatch: Westminster Licensed Premises Group: Paddington Pubwatch:
- Street Pastors.
- **Business Improvement Districts (BIDs)**
  - Baker Street (Baker Street Quarter Partnership)
  - Bayswater (Bayswater Village):
  - West End (Heart of London HOLBA):
  - West End (New West End Company)
  - Marble Arch (Marble Arch London)
  - Aldwych and Trafalgar Square (Northbank)
  - Paddington (Paddington Now):
  - Victoria (Victoria):
- Purple Flag Accredited Areas: Leicester Square; Victoria
7. Further Data on Economic Impact

7.1 ENTE – 4 London Borough Comparisons

Note that the ENTE plays a very different role in each of these boroughs.

It is important to make these points because when we study the statistics that follow it is necessary to discount the numerical importance of ENTE percentages in local economic activity and to focus on the overall relative scale of what is present in each of the four very different centres.

7.2 Borough Comparisons

Here we provide headline details of the ENTE economies using five key metrics:

- Firms
- Employment
- Turnover
- Output (GVA)
- Productivity (GVA/employee)

Table 7: The size of the Core ENTE in the four boroughs

<table>
<thead>
<tr>
<th>Borough</th>
<th>NTE Activity</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
<th>GVA (£m)</th>
<th>Productivity (£k/emp)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croydon</td>
<td>Drink</td>
<td>290</td>
<td>1,800</td>
<td>102</td>
<td>39</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>100</td>
<td>870</td>
<td>71</td>
<td>21</td>
<td>24</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>1,045</td>
<td>4,750</td>
<td>209</td>
<td>109</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>1,435</td>
<td>7,420</td>
<td>382</td>
<td>169</td>
<td>23</td>
</tr>
<tr>
<td>Lambeth</td>
<td>Drink</td>
<td>375</td>
<td>2,580</td>
<td>150</td>
<td>56</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>135</td>
<td>1,320</td>
<td>161</td>
<td>54</td>
<td>41</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>940</td>
<td>4,750</td>
<td>198</td>
<td>118</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>1,450</td>
<td>8,650</td>
<td>509</td>
<td>227</td>
<td>26</td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>Drink</td>
<td>180</td>
<td>860</td>
<td>48</td>
<td>19</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>65</td>
<td>300</td>
<td>30</td>
<td>12</td>
<td>41</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>715</td>
<td>2,640</td>
<td>116</td>
<td>60</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>960</td>
<td>3,800</td>
<td>195</td>
<td>90</td>
<td>24</td>
</tr>
<tr>
<td>Westminster</td>
<td>Drink</td>
<td>1,235</td>
<td>12,230</td>
<td>712</td>
<td>277</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>525</td>
<td>11,450</td>
<td>1,349</td>
<td>366</td>
<td>32</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>3,190</td>
<td>34,320</td>
<td>1,495</td>
<td>824</td>
<td>24</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>4,950</td>
<td>58,000</td>
<td>3,556</td>
<td>1,467</td>
<td>25</td>
</tr>
</tbody>
</table>

Source: TBR Observatory PN01416R, analysis W1.

On the four main output measurements, the Westminster ENTE is on a completely different scale. If we focus simply on sales revenue in 2015 the three Westminster Core ENTE sub sectors total £3.6 billion whilst Croydon is £382 million, Lambeth £509 million and Waltham Forest £194 million i.e. the Westminster ENTE is 3.5 times larger than the other boroughs combined together.
A Report Into Aspects of London’s Evening And Night-time Economy

Table 8 (below) summarises the scale of the four borough economies in Non-Core and Supporting ENTE activities. The table drives home the comparative size of the ENTE related Supply Chain in each of the four boroughs.

Again the relative size of the Westminster ENTE Supply Chain is especially illustrated by the relative values of its firms, employment figures and sales turnover.

All data relate to 2015 unless otherwise stated.

Waltham Forest sales revenue from the Non-Core ENTE supply chain is c50% of either Croydon or Lambeth. We see in later detailed figures that Lambeth has developed a relatively diverse ENTE and the supply chain values help to deliver this but so does its proximity to the West End on South Bank. Although Croydon has more supply chain firms than Lambeth or Waltham Forest it is clear that the Lambeth firms are of larger average size and deliver higher employment and sales revenue.

Table 8: The size of the Non-Core ENTE in the four boroughs

<table>
<thead>
<tr>
<th>Borough</th>
<th>NTE Activity</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
<th>GVA (£m)</th>
<th>Productivity (£k/emp)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croydon</td>
<td>Non-Core ENTE</td>
<td>2,515</td>
<td>15,520</td>
<td>1,531</td>
<td>531</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>285</td>
<td>8,090</td>
<td>589</td>
<td>321</td>
<td>40</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>2,800</strong></td>
<td><strong>23,610</strong></td>
<td><strong>2,120</strong></td>
<td><strong>852</strong></td>
<td><strong>36</strong></td>
</tr>
<tr>
<td>Lambeth</td>
<td>Non-Core ENTE</td>
<td>1,995</td>
<td>13,190</td>
<td>1,241</td>
<td>485</td>
<td>37</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>180</td>
<td>10,280</td>
<td>887</td>
<td>381</td>
<td>37</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>2,175</strong></td>
<td><strong>23,470</strong></td>
<td><strong>2,128</strong></td>
<td><strong>866</strong></td>
<td><strong>37</strong></td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>Non-Core ENTE</td>
<td>1,705</td>
<td>8,440</td>
<td>829</td>
<td>291</td>
<td>34</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>135</td>
<td>4,350</td>
<td>276</td>
<td>172</td>
<td>39</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>1,840</strong></td>
<td><strong>12,790</strong></td>
<td><strong>1,105</strong></td>
<td><strong>463</strong></td>
<td><strong>36</strong></td>
</tr>
<tr>
<td>Westminster</td>
<td>Non-Core ENTE</td>
<td>7,800</td>
<td>91,470</td>
<td>13,632</td>
<td>4,825</td>
<td>53</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>1,170</td>
<td>26,120</td>
<td>2,022</td>
<td>1,039</td>
<td>40</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>8,970</strong></td>
<td><strong>117,590</strong></td>
<td><strong>15,654</strong></td>
<td><strong>5,864</strong></td>
<td><strong>50</strong></td>
</tr>
</tbody>
</table>

Source: TBR Observatory PN01416R, analysis W1.

The Spatial Distribution Of The 4 Boroughs' ENTEs

Here we illustrate the spatial layout of core ENTE activities and performance in the four boroughs.

In this study the spatial areas that are applied to the measurement of economic activity are based upon either, the entire ENTE activity within borough boundaries, or as in the case of the Hot Spots, a smaller more concentrated geography, which is considered to be an area of concentrated ENTE activity.

In reality, the geography of an ENTE is invariably either subject to special definition due to concerns about cumulative impact, as in the case of Hot Spot definition both here and elsewhere, or the nodes of an ENTE tend to be imprecisely defined which make comparison for policy purposes quite difficult.
Croydon

Most ENTE business activity is concentrated in the North West quadrant of the borough and stretching across towards East Croydon Station. The epicentre is clustered close to the Town Hall and Police Station north of the axis of the east west flyover.

The redevelopment of Croydon Town Centre with a new £1.4 billion retail and leisure development could substantially alter this pattern.

**Figure 5 Core ENTE Firm Distribution in Croydon**

Source: TBR observatory PN01416R

Lambeth

The connection of Lambeth to Westminster is clear from the distribution of ENTE firms along South Bank. Lambeth also has other ENTE centres, which an earlier study⁶ identified as including the area around Vauxhall Nine Elms, Clapham High Street, Brixton Town Centre and Streatham High Street.

West Norwood also formed part of that study but was considered to be a local ‘nascent’ ENTE centre serving some local needs.

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⁶ A study of ENTE Centres in Lambeth – 2012 – TBR and MAKE Associates
The Borough of Lambeth believes that ENTE business focus has brought added prosperity to the borough, which is a similar message in broad terms to the story of Shoreditch in Hackney.

Figure 6: Core ENTE Firm Distribution in Lambeth

These maps should be built on in order to understand both the present clustering patterns and how those patterns have changed over the 10 years since 2005.

Projections of patterns of change would help future ENTE planning where Boroughs wish to give this level of priority to their ENTE sector activities within Borough plans.
Waltham Forest

Figure 7: Core ENTE Firm Distribution in Waltham Forest

Westminster

In Westminster, the Metropolitan Police manage three defined Stress Areas but the Stress Areas have much that is not common and the footprint of an ENTE Stress Area or Cumulative Impact Area is subject to continuous change.

The WESA or West End Stress Area, is the most concentrated area for a range of measured criminal activities in London whilst it is contained within the two West End wards of West End and St. James and accounts for 18.5% of all Westminster ENTE revenue in 4.5% of its geography\(^7\).

The map below indicates this heavy concentration of ENTE business activities in the two West End wards.

\(^7\) Point 61 Page 18 – Westminster ENTE Cost Benefit Report – 2014
7.3 The Value of the Core and Non-Core ENTE to Borough Economies

Since each of these four Boroughs is very different in economic character, we have expressed the proportion of value that the Core and Non-Core contribute to each local economy as a percentage of all economic activity in each Borough.

The outcomes are surprising in some cases.

For example, the Core ENTE in Waltham Forest contributes a higher proportion of the total annual sales turnover for all activities at 1.9%.

This illustrates one of the many problems of comparative methods of measuring performance. These figures completely disguise the huge differences in scale and structure of the individual local economies.

Surprisingly, this percentage league tabling carries through into the Non-Core figures in Table 9 where Waltham Forest is shown to receive over 10% of its annual sales revenue from ENTE supply chain businesses. Note that in Westminster the equivalent figure is 5.4%.

The reason is probably that Waltham Forest is both a small and narrowly based activity sector economy but it certainly provides argument that the ENTE should figure prominently in the development of local economic plans.
Core ENTE

As Table 9 illustrates, ENTE businesses are generally more useful to the local economy and communities in generating proportionality larger numbers of enterprise and employment opportunities and are not as highly generative of sales revenue and value added.

This is partly because many jobs in the activities are relatively unskilled and deliver lower earnings and partly because as service businesses they are heavily labour dependent compared to some of the more advanced scientific and professional sectors.

In each Borough it is the Food led activities that deliver the highest levels of ENT employment and sales revenue.

Table 9: Percentage Contribution of Core ENTE to the whole economy in the four boroughs

<table>
<thead>
<tr>
<th>Borough ENTE</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croydon Drink</td>
<td>1.40%</td>
<td>1.20%</td>
<td>0.30%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>0.50%</td>
<td>0.60%</td>
<td>0.20%</td>
</tr>
<tr>
<td>Food</td>
<td>4.90%</td>
<td>3.10%</td>
<td>0.70%</td>
</tr>
<tr>
<td>Total</td>
<td>6.80%</td>
<td>4.90%</td>
<td>1.20%</td>
</tr>
<tr>
<td>Lambeth Drink</td>
<td>2.30%</td>
<td>1.80%</td>
<td>0.40%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>0.80%</td>
<td>0.90%</td>
<td>0.50%</td>
</tr>
<tr>
<td>Food</td>
<td>5.70%</td>
<td>3.30%</td>
<td>0.60%</td>
</tr>
<tr>
<td>Total</td>
<td>8.80%</td>
<td>6.00%</td>
<td>1.50%</td>
</tr>
<tr>
<td>Waltham Forest Drink</td>
<td>1.50%</td>
<td>1.20%</td>
<td>0.50%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>0.50%</td>
<td>0.40%</td>
<td>0.30%</td>
</tr>
<tr>
<td>Food</td>
<td>5.80%</td>
<td>3.80%</td>
<td>1.10%</td>
</tr>
<tr>
<td>Total</td>
<td>7.80%</td>
<td>5.40%</td>
<td>1.90%</td>
</tr>
<tr>
<td>Westminster Drink</td>
<td>1.60%</td>
<td>1.30%</td>
<td>0.20%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>0.70%</td>
<td>1.20%</td>
<td>0.50%</td>
</tr>
<tr>
<td>Food</td>
<td>4.10%</td>
<td>3.60%</td>
<td>0.50%</td>
</tr>
<tr>
<td>Total</td>
<td>6.40%</td>
<td>6.10%</td>
<td>1.20%</td>
</tr>
</tbody>
</table>

Source: TBR Observatory PN01416R, analysis W1.

Non-Core ENTE

In Table 10 (p31) it is striking that percentage wise, Westminster depends least on the ENTE as a Borough for both employment and sales revenue.

There are a number of ways of looking at this, but however we look at it the impact produced by the most diversified and broad sector economic structure of any local authority in the UK only serves to strengthen the absolute performance of the Westminster ENTE.

The scale of all Westminster activities is one reason why its ENTE is so successful.

There are literally more people in more occupations who may be interested in using evening and night-time leisure services.

It is difficult to postulate that changes in London infrastructure are likely in themselves to alter
this relative level of attraction. It is just as likely that Night Tube and Crossrail will open up Westminster to greater use of its services. Thus the needs of regulation are likely to be greater in Westminster.

A key characteristic of the Borough is its role as the location where some of the UK’s most famous historical buildings and its Parliament reside and where Buckingham Palace and other royal palaces are located.

This is part of the dynamic that attracts the tourist spend as a component in the ENTE.

The challenge to the other three Boroughs is to add to their economic strength by broadening their sector appeal since this will drive further growth in the ENTE whilst percentage dependency will reduce.

### Table 10: Contribution of Non-Core ENTE to the whole economy in the four boroughs

<table>
<thead>
<tr>
<th>Borough ENTE</th>
<th>Non-Core ENTE</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croydon</td>
<td>Indirect</td>
<td>12%</td>
<td>10.00%</td>
<td>5.00%</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>1%</td>
<td>5.20%</td>
<td>1.90%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>13.00%</strong></td>
<td><strong>15.20%</strong></td>
<td><strong>6.90%</strong></td>
</tr>
<tr>
<td>Lambeth</td>
<td>Indirect</td>
<td>12%</td>
<td>9.20%</td>
<td>3.50%</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>1%</td>
<td>7.20%</td>
<td>2.50%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>13.00%</strong></td>
<td><strong>16.40%</strong></td>
<td><strong>6.00%</strong></td>
</tr>
<tr>
<td>Waltham Forest</td>
<td>Indirect</td>
<td>14%</td>
<td>12.20%</td>
<td>8.10%</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>1%</td>
<td>6.30%</td>
<td>2.70%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>15.00%</strong></td>
<td><strong>18.50%</strong></td>
<td><strong>10.80%</strong></td>
</tr>
<tr>
<td>Westminster</td>
<td>Indirect</td>
<td>10%</td>
<td>9.70%</td>
<td>4.70%</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>2%</td>
<td>2.80%</td>
<td>0.70%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>12.00%</strong></td>
<td><strong>12.50%</strong></td>
<td><strong>5.40%</strong></td>
</tr>
</tbody>
</table>

Source: TBR Observatory PN01416R, analysis W1.

### 7.4 Borough ENTEs – Longitudinal Comparisons

Here we set out how the Core ENTE sectors have performed in each borough over the ten year period 2005 to 2015. Charts which review these changes in detail by firms, employment, and turnover can be found below in Sections 8 and 9.

Here we have selected changes in levels of employment in each of the four Boroughs as a proxy to illustrate the importance of the Core ENTE to borough achievement and opportunity.

**Employment Change in Croydon ENTE**

In Figure 10 we see that levels of employment in Food led ENTE businesses have grown from just under 4000 employees in 2005 to a peak level achieved just as the Global Financial Crisis (GFC) began to impact on the UK economy. The level of c5000 jobs has remained resilient through to 2015 but not grown.

Employment in Entertainment led businesses has slightly declined over the 10 years from just over 1000 jobs to just below 1000. The small decline began again in 2009.

Employment in Drinks led firms flat-lined over the 10 year period at just under 2000 people.
A Report Into Aspects of London’s Evening And Night-time Economy

Figure 9: Croydon

Employment Change in Lambeth ENTE
Lambeth, Figure 10, shows a different pattern of change to Croydon with Food led employment climbing from about 3500 jobs in 2005 to nearly 5000 jobs in 2015. Drinks employment recovered from the impact of the GFC and in 2015 runs at circa 2600 jobs compared to 2200 at the beginning of the 10-year period. Entertainment employment levels began to fall from 2005 and have not recovered to any appreciable extent and stand at c1200 jobs in 2015. (In spite of the popularity of South Bank and the success of Entertainment in Brixton.

Figure 10: Lambeth

Employment Change in Waltham Forest ENTE
Employment change in Waltham Forest (Figure 11, below) is most clear in Food led businesses, which have increased from 2000 jobs in 2005 to 2600 jobs in 2015. Drinks employment continues at the same level throughout the period whilst employment in Entertainment led businesses began to fall before the start of the GFC and has plateaued at its lower level of 300 jobs in comparison to the c900 recorded in 2005.
Employment Change in Westminster ENTE
Food led businesses in Westminster (figure 12) have increased in employment by c5000 jobs in rising from just over 30,000 jobs in 2005 to 35,000 in 2015.

Entertainment led and Drinks led businesses each follow an identical trajectory beginning at just over 10,000 jobs and reaching c12,000 jobs each by 2015.

Taken all together Westminster has added c9000 jobs in its ENTE over this 10-year period which is close to the total levels of employment of Croydon and Waltham Forest combined.

As with any other statistics that we might wish to consider this rate of growth in jobs illustrates the dynamic economic benefits of this important cluster of businesses that make up the Westminster ENTE.

8. Uber Maps
Uber provided interesting data which illustrated the comparative popularity of Brixton and Croydon as ‘hotspots, with regard to Uber’s customers. This data was gathered before the Night Tube started operation.
Figure 13 (below) illustrates the distance participants in the night time economy are prepared to travel. It also illustrates the expansion in Uber’s customer base.

**Figure 13: Nighttime trips from Brixton and Croydon town centres**

![Figure 13](image)

Figure 14: Uber trips from Brixton and Croydon peak at night

![Figure 14](image)

Source: Uber, 2016

Figure 14 (above) demonstrates the importance of weekends to the night time economy.
9. Hotspot – Brixton Town Centre

9.1 Narrative

Brixton Town centre has a thriving night-time economy. It is anchored by three major venues, The Ritzy cinema, the O2 Academy and the Electric. It also has two historic covered markets, Brixton Village and Market Row. These accommodate an array of small traders many of whom are open until nearly midnight, serving food and drink. There is also a market under the railway arches and a temporary ‘BoxPark’ on a site adjacent to the railway. There are other pubs, clubs, restaurants and bars in addition to these main features, all within easy walking distance and served by the tube (Victoria Line), an overground railway and many buses. In common with the rest of south-east London, Brixton is undergoing gentrification in its private housing market. It has benefited from investment and improvements to the public realm, with a new public space outside the Ritzy cinema, which relieves some pressures on its crowded streets.

9.1.1 Map/ Boundary

Source: Appendix C: Economic Impact Report - TBR
9.2 Brixton Core Hotspot ENTE

The Brixton ENTE Hot Spot comprises
- 6.5% of all Lambeth ENTE Firms
- 7% of all Lambeth ENTE Employment
- 6% of all Lambeth ENTE Sales Revenue

The size of the ENTE (firms, employment, turnover and GVA) is summarised in Table 10 and illustrates the economic performance in 2015 of the Brixton Hot Spot.

In 2015 it generated a sales turnover of £30.9 million through the 95 establishments recorded in our data and they employed 580 people. The proportion of Entertainment led turnover is high at c40%.

Table 11: Economics Summary - Brixton Core ENTE Hot Spot

<table>
<thead>
<tr>
<th>Brixton Hot Spot</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
<th>GVA (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core ENTE</td>
<td>Drink</td>
<td>20</td>
<td>6.5</td>
<td>2.6</td>
</tr>
<tr>
<td></td>
<td>Entertainment</td>
<td>15</td>
<td>12.3</td>
<td>4.4</td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>60</td>
<td>12.1</td>
<td>7.2</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td>95</td>
<td>30.9</td>
<td>14.2</td>
</tr>
<tr>
<td>Non-core ENTE</td>
<td>Indirect</td>
<td>185</td>
<td>91.1</td>
<td>30.1</td>
</tr>
<tr>
<td></td>
<td>Supporting</td>
<td>5</td>
<td>2.3</td>
<td>1.4</td>
</tr>
</tbody>
</table>

Source: TBR Observatory PN01416R, analysis W1.

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

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

Longitudinal Change in the Brixton ENTE

In the case of Brixton Table 11 illustrates change in sales revenue over the 10-year period and in particular, the unusual increase and growth of the Entertainment led ENTE, which by 2015 has reached the same level as the Food led ENTE sub segment.

Figure 15: Longitudinal Change – Core ENTE

Source: TBR Observatory PN01416R, analysis W1.
9.3 Brixton Tube Station Pedestrian Footfall
Access to TfL data released to developers at its October 2015 Hackathon event enabled the following snapshot study.

9.3.1 Entries And Exits, Brixton Station, Sat. 17 Oct. 2015

<table>
<thead>
<tr>
<th>Time</th>
<th>Number of Entries</th>
<th>Number of Exits</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00 - 18:00</td>
<td>16,085</td>
<td>21,652</td>
</tr>
<tr>
<td>18:00 - 22:00</td>
<td>11,865</td>
<td>7,200</td>
</tr>
<tr>
<td>22:00 - 01:30</td>
<td>4,724</td>
<td>3,528</td>
</tr>
</tbody>
</table>

Source: TfL Hackathon data, October 2015

9.3.2 Entries And Exits, Brixton Station, Tues. 20 Oct. 2015

<table>
<thead>
<tr>
<th>Time</th>
<th>Number of Entries</th>
<th>Number of Exits</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00 - 18:00</td>
<td>14,616</td>
<td>19,850</td>
</tr>
<tr>
<td>18:00 - 22:00</td>
<td>17,666</td>
<td>5,111</td>
</tr>
<tr>
<td>22:00 - 01:30</td>
<td>5,305</td>
<td>1,322</td>
</tr>
</tbody>
</table>

Source: TfL Hackathon data, October 2015
8.3.3 Entries And Exits, Brixton Station, 11-24 Oct. 2015 | 17.00-19.00 hrs

Source: TfL Hackathon data, October 2015

9.3.4 Entries And Exits, Brixton Station, 11-24 Oct. 2015 | 19.00-21.00 hrs

Source: TfL Hackathon data, October 2015
9.3.5 Entries And Exits, Brixton Station, 11-24 Oct. 2015 | 21.00-23.00 hrs

Number of Entries and Exits of Brixton Station
11-24 October 2015 - 21:00 - 23:00

Key:
- Represents 500 people exiting Brixton Station
- Represents 500 people entering Brixton Station

Source: TfL Hackathon data, October 2015

9.3.6 Entries And Exits, Brixton Station, 11-24 Oct. 2015 | 23.00-01.00 hrs.

Number of Entries and Exits of Brixton Station
11-24 October 2015 - 23:00 - 01:00

Key:
- Represents 500 people exiting Brixton Station
- Represents 500 people entering Brixton Station

Source: TfL Hackathon data, October 2015
9.3.7 Entries And Exits, Brixton Station, 11-24 Oct. 2015 | 17.00-01.00 hrs.

**Number of Entries and Exits of Brixton Station**
11-24 October 2015 - 17.00 - 01.00

The thumbs up maps show the number of commuters entering and exiting Brixton Station during the period of 11-24 October 2015 from 17.00 until 01.00. These maps are merely a potential representation of the volume of traffic. The data represent pedestrian volume exiting and entering the station, and not specific destinations or routes of the commuters. The total amount of the travelers is shown in the graphs below.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Total Entering</th>
<th>Total Exiting</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.00 - 19.00</td>
<td>121,880</td>
<td>59,534</td>
</tr>
<tr>
<td>19.00 - 21.00</td>
<td>120,139</td>
<td>35,655</td>
</tr>
<tr>
<td>21.00 - 23.00</td>
<td>62,919</td>
<td>26,234</td>
</tr>
<tr>
<td>23.00 - 01.00</td>
<td>44,670</td>
<td>26,283</td>
</tr>
</tbody>
</table>

Source: TfL Hackathon data, October 2015

9.4 Interview Summary: Michael Smith - BID Director, Brixton BID

1. The ENTE is one of three key themes of the BID, along with Marketing and Partnerships, and Environment;

2. The BID organises regular meetings with venues and Police called ‘Friday Night Briefings’;

3. They contribute to cleaning and the street pastors;

4. Brixton does not have a large office population – people come to Brixton for leisure. It is not dominated by after-work drinking, such as more central parts of London;

5. Variety is a key factor, as is the geography. The ENTE is diverse and also spread out. Eating and live music are very important;

6. Some concern about gentrification and new residential developments. Residents need to know they are not moving into a village;

7. Infrastructure, such as public toilets, need attention.
9.5 Interview Summary: Rachid Ghailane – Markets Operation Manager, Brixton Village & Market Row

1. The proposal to open some of the market stalls at night came from the traders in 2010. The markets are now open up until 23.30, Tues - Sun;

2. Some traders have recorded and/ or live music outside their units: “… it changes the atmosphere in the market”;

3. Total footfall on a busy Saturday is higher between 18.00 & 23.30 (6,400) than between 09.00 & 18.00 (5,600), even though there are less opening hours at night;

4. There is a synergy between gigs at the O2 Academy and footfall in the markets and Village;

5. “…the late economy adds a lot of value to the market and I can see that there will be a future when we expand it, especially the opening of tube stations at night, that will help a lot.”

9.6 Venue Interview Summary – Electric Brixton: Dominic Madden, Venue Owner/ Operator

“The problem is about the underlying commercial value of [venues] – ultimately to protect uses there needs to be a look at planning and a landlord's ability to obtain a change of use. How can not only these buildings be protected but also their use be protected…? It's one thing blocking change of use but a massive hike in rent won't be sustainable for the business either.”

“We need to deter speculative development on sites that shouldn't be bought for speculative development.”

“…capricious landlords wanting to extract the maximum rent. This is the key challenge to all of this. That would be my message to the London Mayor.”

1. Leaseholder since 2010, bringing venue out of administration (previously The Fridge);

2. Initial hostility by stakeholders due to building’s association with it being an historically troubled venue (mainly alcohol, drugs and violence);

3. Bourne out of desire to bring Koko-style venue to south London; its theatre infrastructure means it can support high-profile, production-heavy artists;

4. 1,500 capacity/ 146 shows in 2015, 50 of which were live performances; brings ¼ million people a year to the area to the benefit of other ENTE sectors – esp. food and drink;

5. Amassed a very dedicated core team who work well with all stakeholders incl. Met Police & LB Lambeth;

6. Council is pragmatic; difference in approach between local authority and Police, but
both understand challenges and able to discern responsible operators;

7. More recent inconsistency of Police licensing officers has been problematic (though appears resolved);

8. Excellent relationship with Police aren’t aggressive or over zealous; they are responsive and understand issues large capacity venues face, esp. re drugs;

9. Concerned about Police funding cuts. Who funds expensive NTE policing?

10. One incident badly handled by acting police licensing resulted in £30,000 cost to venue (lost revenue and legal costs); could have been disastrous but swiftly resolved;

11. Would do more in Brixton if there were the right venues/ buildings;

12. Property development a fundamental, key problem – certain venues should be protected from greedy landlords and re-development;

13. LB Lambeth very supportive of venue (now written into council’s development plan); council entered into a joint-venture with some of the areas developers to help safeguard re-development/ change of use (less likely to be re-developed);

14. Post 2010, undue focus on incidents like ‘phone thefts;

15. Certain protocols that licensing teams and Police deem necessary are proscribed but actually sometimes need to be bespoke to the space and the strength and skills of the venue teams e.g. door security;

16. The area’s small operators do get squeezed from all sides; list of licensing conditions have potential to put operators out of business;

17. NTE underpins the evening economy; if the O2 Academy and the Electric both have sold out shows on the same evening – 6,000 people drawn into the area, benefitting all NTE;

18. Gentrification a challenge; hope council hold its own against calls for more restricted hours;

19. London-wide, [licensing] appears to show a lack of joined-up thinking across all stakeholders – planning, police, and local authority.

9.7 Interview Summary: Inspector Dan Rutland - London Metropolitan Police

1. The independents are a key part of their success. Diversity and live music are important;

2. Infrastructure, such as public toilets, needs developing but transport connections are very good;

3. Over-saturation and dispersal could become a problem;
4. Very little violence, and very few fights in clubs or bars;
5. Work very closely with premises.

9.8 Interview Summary: Jamie Akinola, Licensing Officer, Lambeth Council

1. Policy encouraging business models not solely based on alcohol - but easier said than done;
2. Committed to being involved in process as early as possible to head off potential problems;
3. Licensing and planning should be integrated;
4. Current balance under local authority is in need of tweaking;
5. Live music does not create as many issues in Brixton as busking, which is more problematic;
6. Having a policy is not enough – needs to be operationalised, with better information and guidance given to potential applicants;
7. Late-night levy an option but no decision made – would prefer to deal with the issue via other means if possible;
8. Too early to comment on night tube; initial concern but some officers report potential positive impact on dispersal and local authority acknowledges the need for London;

9.9 Venue Licensing Application – Dogstar

This venue was chosen for detailed examination because of its innovative approach. As such, it does not provide an exact equivalent to the chosen Croydon venue. The Fridge Bar would be a comparator, but that has closed down since its license was revoked.

Dogstar, 389 Coldharbour Lane Brixton SW9 8LQ

Licensee: Atlantic Dogstar Limited
Designated Premises Supervisor: Abby Munro

- Opening Times: Mon, Tue, Wed: 11:00 - 02:30:00 Thu, Fri, Sat: 11:00 - 04:30:00; Sun: 12:00 - 02:30:00
- Licensed to supply alcohol, on and off the premises: Monday - Wednesday: 11:00 - 02:30:00; Thursday - Saturday: 11:00 - 04:00; Sunday: 12:00 - 02:30:00
- Licensed for recorded music: Monday - Wednesday: 11:00 - 02:30:00, Thursday - Saturday: 11:00 - 04:00; Sunday: 12:00 - 02:30:00
- Licensed for Live Music: Monday - Wednesday: 11:00 - 02:30:00 Thursday - Saturday: 11:00 - 04:00 Sunday: 12:00 - 02:30:00
- Licensed for Entertainment Music/Dance: Monday - Wednesday: 11:00 - 02:30:00 Thursday - Saturday: 11:00 - 04:00 Sunday: 12:00 - 02:30:00
Context and Background

- An important example in licensing terms as it is an example of a premises that fully embraced the liberalising turn post LA 2003, moving away from being a pub that shut at 11pm to one that now has a terminal licensing hour at the weekend of 4am on Saturday and Sunday morning;

- Dogstar is now a three-storey night-time venue on corner of Coldharbour Lane and Atlantic Avenue hosting a variety of entertainment activities self describes itself as ‘London’s first DJ bar’;

- Previously known as the Atlantic Hotel – regarded by some as ‘Brixton’s most visible black pub’;

- Opened as Dogstar in 1995. Seen by some as emblematic of the gentrification that was taking place in Brixton (see general commentary on forums such as urban75);

- Historically, an extension of opening hours led to various noise problems and conditions placed on licence;

- Now appears generally well run

Ownership

- 2006 Punch Taverns (licence issued 10/02/06)
- 2009 transferred to Atlantic Dogstar Ltd (21/09/09)
- 2011 further transfer to Antic limited (issued 01/03/11)
- 2012 transferred to Atlantic Dogstar Ltd (15/11/12)

The urban75 forums have useful local commentary and discussion concerning Dogstar and Lambeth licensing policy generally, e.g.:

- Lambeth Licensing Policy Consultation And Survey Proposes That All Brixton Clubs To Shut At 2am (12.09.13)

- Noise Complaints About Clubs And Venues in Central Brixton (24.08.12)
10. Hotspot – Croydon Town Centre

10.1 Narrative

Croydon town centre is larger than Brixton, and its night-time economy is split into two distinct areas. The northernmost area is around the High Street and is characterised by large-scale nightclubs and bars. Some of these have closed recently, the most prominent being Tiger Tiger, (closed January 2016) which faces the now vacant Yates Wine Lodge (closed May 2015) across the High Street. These, amongst other closures, combined with the redevelopment of the Whitgift shopping centre just north of the High Street, have led some of the remaining operators to suggest that Croydon’s night-time economy can be completely reinvented. The other section of Croydon’s nightlife is approximately 15 minutes walk south down the continuation of the High Street and features a string of cafes, pubs, restaurants and bars, some of which provide entertainment, facing onto the South End street. The Fairfield Halls, to the east of the High Street are currently undergoing refurbishment and will become a key anchor in a new cultural quarter. The Council is currently implementing a public realm improvement programme, which will assist in providing walkable connections between these different areas.

There was less information available for Croydon than for Brixton, with regard to footfall and interview material.

10.1.1 Map/ Boundary

Source: Appendix C: Economic Impact Report – TBR
10.2 Croydon Core ENTE Hot Spot

The Croydon Hot Spot geography, which broadly covers its Cumulative Impact Area, contains:

- 16% of all Croydon ENTE Firms
- 21% of all Croydon ENTE Employment
- 18% of all Croydon ENTE Sales Revenue

The size of the ENTE (firms, employment, turnover and GVA) is summarised in Table 12 (below).

Table 12: Economic Summary - Croydon Core ENTE Hot Spot

<table>
<thead>
<tr>
<th>Croydon Hot Spot</th>
<th>Firms</th>
<th>Employment</th>
<th>Turnover (£m)</th>
<th>GVA (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core ENTE Drink</td>
<td>50</td>
<td>480</td>
<td>27.9</td>
<td>10.5</td>
</tr>
<tr>
<td>Core ENTE Ent</td>
<td>5</td>
<td>80</td>
<td>4.6</td>
<td>1.7</td>
</tr>
<tr>
<td>Core ENTE Food</td>
<td>180</td>
<td>970</td>
<td>37.7</td>
<td>22.7</td>
</tr>
<tr>
<td>Totals</td>
<td>235</td>
<td>1530</td>
<td>70.2</td>
<td>34.9</td>
</tr>
<tr>
<td>Non-core ENTE Indirect</td>
<td>365</td>
<td>1,340</td>
<td>130.5</td>
<td>50.6</td>
</tr>
<tr>
<td>Supporting</td>
<td>15</td>
<td>190</td>
<td>9.7</td>
<td>9.2</td>
</tr>
</tbody>
</table>

Source: TBR observatory PN01416R, analysis W1.

Longitudinal Change in the Croydon Town Centre ENTE

Tables which show the longitudinal performance of the Croydon Town Centre Hot Spot ENTE by firms Employment, sales revenue and gross value added are shown at Section 9 Appendix 3 of the TBR report (see Appendix C).

Here we show Table 13 (p47) from that series which illustrates how different the Croydon Hot Spot is to the one we have just reviewed for Brixton. This table shows the longitudinal sales revenue change at Croydon.

Here we see that unlike Brixton where the Entertainment led sub-segment grew to rival that of Food, that it continues along at the bottom of the three sub-segments with only slight increase in revenue.

The Drinks led sub segment on the other hand grows in parallel with Food led activities until 2012 and although it drops below Food by 2013 it is still almost as strong a sub segment by 2015 and has grown from £20 million in sales turnover to nearly £30 million.
Table 13 Longitudinal Change – Core ENTE

Source: TBR observatory PN01416R, analysis W1.

10.3 Interview Summary: Shaun Webster – Head of Operations, Croydon BID

1. The evening and night-time economies are different;

2. The town centre has many office workers but they tend to leave after work and do not really socialise en-masse. At the weekend, venues get busier after 10.00pm;

3. New residential developments might help keep people in town between 6.00 – 9.00pm. There are over 6,000 residential units planned and in the pipeline, meaning the use of the town centre will develop;

4. Perception and image for Croydon on the whole is the main problem – incidents of violence and crime are lower than perceived;

5. The large venue model is changing – closures are London-wide, not just Croydon;

6. While very well connected, the town is very dispersed – there is no central square. There is no real overlap between the retail economy and evening economy. Retail functions cease at 6pm;

7. The BID supports and help manage the Pubwatch initiative through the business crime reduction partnership;

8. There is a new Evening Economy Group formed, chaired by a Council cabinet member;

9. New developments (residential and the forthcoming Westfield) will have significant impact;

10. Developing pop-up events in the evening to help fill the 6.00-9.00pm gap. New events are developing – Croydon held a large Pride event (Aug. bank holiday) aimed at getting people to use and explore the town centre and use its spaces;

11. There are strong shoots of regeneration, including a large emerging tech industry. Commercial interests are developing - various organisations moving their head offices to Croydon e.g. the Body Shop;

12. Cultural offer very much a focused part of the regeneration. A £30 million revamp of Fairfield Halls and development of a cultural quarter are part of this.
A Report Into Aspects of London’s Evening And Night-time Economy

10.4 Interview Summary: Esther Sutton, Head of Pubwatch, Croydon

1. The NTE is targeted at 18-30, is commercial and urban music-led;
2. The NTE has diminished over the past 12 months;
3. Perception is the main problem, especially around binge drinking and knife crime;
4. There is little live music in the town centre;
5. New residential developments could mean diversification and premises improving their offer;
6. There has been tension between operators and the police but this is improving;
7. Historically, the focus has been on daytime development with little support for the ENTE, but this is improving;
8. Would like to see the reintroduction of Bestbarnone but it requires funding;
9. The NTE has become dominated by young men – need to improve the offer for young women;
10. Police relations are vastly improved and we're working very well together now.

10.5 Interview Summary: Saif Bonar, Venue Owner/Operator, Matthews Yard

“*It’s as if the council absolved themselves of licensing responsibility, and deferred to the Police*”

“It’s time for the Mayor of London to take control of the licensing function and spearhead a simplified, streamlined and more efficient multi-agency licensing function which is fit for the 21st century…a transparent, public, fair and even application of the rules, which should be communicated clearly and concisely to all licensed premises.”

1. Opened April 2012, as a response to Croydon riots, by offering an alternative community space. Conceived as café and workspace;
2. Expanded into live music and entertainment venue, now operating a café, bar, live music venue, studio theatre and art gallery from the space;
3. In early days when core focus was café-bar and workspace, little input from licensing at the LA or MPS. Once we began hosting events with live music and DJs and applying for temporary late licences, this began to change;
4. Systemic inconsistencies with licensing – both the local authority and Met. Police – with both processes, protocols and conditions;
5. Success with free music and food events aimed at bringing community together; met with suspicion, overbearing police presence and obstruction;
6. Police insistence on Form 696 profiling for house, bashment, dubstep, grime, garage, hip-hop and raga, despite there ever being any issues arising from these events;
7. At other times, Police friendly and pragmatic – inconsistency in case handling.

8. Events featuring these genres subject to stop and search, undue police presence and pressure;

9. Venue managed effectively and conscientiously, voluntarily upped security measures and staffing to be pro-active;

10. Local authority licensing inconsistent within the department, local officer acting beyond powers, and in opposition to his manager even at informal licence review meetings;

11. Difficulties in licensing of events that go beyond perceived norms;

12. Failures in communication and procedures within licensing; insistence in measures being taken at considerable cost (£25,000) later deemed to be unnecessary;

13. Free of incidents involving alcohol, drugs or violence;

14. Considers ENTE to be “dead on its feet”

15. Questions around use of council’s funds, and who is awarded funding; likewise conduct of some within the council esp. in relation to Box Park (public outcry);

16. If independent venue operators aren’t supported, Croydon town centre will end up with a “staid and manufactured populist NTE, devoid of soul, heart or variety.”

10.6 Interview Summary: Andrew Opie – Director of Safety, Croydon Council

- Croydon town centre has three distinct areas – retail, restaurant and pubs. The council would like to encourage these sector boundaries to become more blurred;

- The restaurant quarter remains buoyant, pubs, clubs and venues have closed;

- The night-time economy is dominant, and alcohol-led; Croydon is looking at encouraging a diversified offer, particularly in the evening economy;

- Evening economy to attract more diverse consumers – families, office workers and commuters; ambition to become a go-to destination;

- The planned re-development is key to growing ENTE, the large increase in town centre residents this development will bring will have a positive impact;

- A broader ENTE offering is expected to follow in line with increased demand from new residential developments;

- There is a lack of suitable venues, council is looking at outdoor events and more imaginative use of open spaces including licensing the spaces themselves;

- The local authority is developing a stronger cultural offer to attract a broader range of clientele. A wider range of events now includes a music festival, a Sunday market with live music and entertainment and a PRIDE festival;


- Licensing objectives currently miss out on health, and also the positive benefits of ENTE;
- Currently the system is punitive; we should be doing more around facilitation and co-ordination, that’s more about simply licensing;
- There’s a desire to move towards partnerships with all stakeholders, and keen on deregulating an overly bureaucratic process;
- Currently reviewing policy and processes around event safety to better-help external partners;
- Local authority want to encourage local entrepreneurs (and who benefit local suppliers), we don’t prioritise in favour of larger operators/ concerns. Keen to support local talent;
- Partnerships are key: licensing is an effective operation, but public need more of a voice in decision-making. Stakeholders need to work together; early conversations are key. Aim is to have a vibrant ENTE – council should have mediation role between stakeholders if necessary;
- Unclear of benefits of night-time tube: Box Park, Westfield and residential developments will have far greater impact.

10.7 Case Study License Review Application – Dicebar, 36 High Street Croydon

This venue was chosen for more detailed study because it is a controversial case and exemplifies some of the points raised in interviews. The evidence covered over 100 pages.

Application for Licensing Review 15 April 2016

Information

Premises Licence covers club on two floors.

There is also a basement, which is operated independently and is rarely open at weekends. Capacity 400.

Licensable activities:

- Licensed to sell alcohol 10.00-03.00 Sun-Wed, 10.00-04.00 Thurs-Sat and further extension New Year’s Eve.
- Licensed for films, recorded music and dancing.
- Licensed for live music 10.00-02.00 Mon-Sun and further extension New Year’s Eve
- Food 23.00-04.00 Sun-Wed and 23.00-05.00 Thurs-Sat plus 23.00-05.00 New Year’s Eve
- Can have up to 20 TENs per year.
- Opening times Tuesday & Wednesday 4pm-11pm, Thursday 4pm-2am, Friday 4pm-3am, Saturday 11am-3am, Sunday 11am-11pm.


Hearing presented with 133 pages of evidence, plus submissions in person. Attendance was so large the committee had to find a different room.
Application for Review
Applicant: Metropolitan Police Service
Grounds for review: infringement of licensing objective, prevention of crime and disorder

Evidence presented:
Records of 38 incidents associated with Dice Bar between 1 January 2015 and March 2016. The majority involved persons ejected, who then were either subject to a dispersal order, or being taken into custody after an altercation with the police. A number of assaults on police officers and on door staff were included in these records as well as violence between customers. One report suggested that a knife had been brought into the premises. Many of the reports referred to the intoxicated state of customers who had left the premises. The reports noted a lack of co-operation between customers and the MPS with regard to giving witness statements.

Closure notices were issued on 5th January 2015 and June 2015 for 48 hours. A meeting was held with the licensed premises holder in January 2015. A routine drugs search discovered traces of a Class A drug in the toilets on 13 March 2015.

Licensed Premises Holder: (LPH)
Premises run responsibly and LPH had always tried to cooperate with the MPS. Attended Pubwatch meetings. Following change of MPS personnel in 2014 relationship had become difficult. LPH had taken all possible steps to improve operation of bar and conform to licensing objectives. Had appointed a licensing consultant to help who gave advice and inspected premises over course of 2015. LPH gave examples of improvements such as enhancing CCTV provision to 29 HD cameras, monthly training sessions for staff, airport style scrutiny of incoming customers, dress code, breathalysing selected customers on entry, zero tolerance of violence, sexual harassment and drug taking, written procedures for dealing with vulnerable persons and established procedure for ejections.

LPH made serious claims against the police, including unfair treatment, racial profiling and heavy-handed tactics employed for dispersal.

The LPH noted that of the 60,000 customer visits made between Jan 2015 and April 2016, 27 arrests had resulted, 0.045% of total.

Other Evidence:
Statement from three of staff from Dice Bar corroborating and expanding on LPH’s statement. Supporting letters from two-dozen or more of the Dice Bar's regular customers. Statement of support from the Licensing Consultant employed by the Dice Bar.

Decision
The application for review was refused.