

Creating a Healthy Night-Time Economy: Key Culture Indicators for World Cities

Special Report for the International Forum on
Cultural Placemaking and the Night-time Economy
24-25 November 2020



世界城市
文化空间
与夜间经济
发展论坛

INTERNATIONAL FORUM
ON CULTURAL PLACEMAKING
& THE NIGHT-TIME ECONOMY
24-25 NOVEMBER 2020

WORLD
CITIES
CULTURE
FORUM

—
BOP
Consulting

0	Executive Summary	7
1	Defining the Night-Time Economy	10
	→ Evening economy, Late-Night economy, or 24hr Economy?	12
	→ Regional variety	13
2	New landscape emerging following recent COVID-19 pandemic	14
	→ Reviewing attitudes towards public space	17
	→ Flexibility and agility towards international/domestic tourism	17
	→ The role of culture in creating social connection	17
3	The importance of culture in defining the Night-Time Economy	18
4	The Night-Time Economy's contribution to placemaking and placebrand	19
	→ Enhancing the Economy	19
	→ Building the Image	20
	→ Enhancing the Experience	20
5	Who participates in the Night-Time Economy?	21
	→ Characterisations of NTE user groups	22
6	Health-check on the Night-time Economy	24
	→ NTE City index – 30 indicators across the five domains	25
	→ Constructing the Night-Time Economy index	26
7	Case studies	30
	→ Audience and participation: Amsterdam, Nanjing	32
	→ NTE Attractiveness: Montreal, Chengdu	38
	→ NTE Leadership: London	46
	→ Enabling Environment: Melbourne	48
	→ Night time Assets: Bangkok, Changsa, Tokyo	50
8	Conclusion	60

Welcome

This report is specially prepared for the International Forum on Cultural Placemaking and the Night-time Economy, Nanjing, November 2020. It sets out the characteristics of successful night-time economies and examines recent efforts by global cities to nurture and manage this increasingly important part of their cultural offer. It is researched and written by BOP Consulting, a global practice specialising in culture, creativity and city development, and draws partly upon BOP's work managing the World Cities Culture Forum. iiMedia Research, an international data-mining company, collated data on Chinese cities.

About WCCF The World Cities Culture Forum is a leading collaborative network of 40 world cities, with a shared commitment to promoting culture as a central pillar of urban policy. It brings together city leaders to share good practice and inspire each other. The Forum publishes the world's most comprehensive data on culture and cities, carries out research on new policy trends and convenes themed symposia, regional summits and workshops including an annual World Cities Culture Summit hosted on a rotating basis by member cities. The World Cities Culture Forum is an initiative of the Mayor of London, organised and coordinated by BOP Consulting. www.worldcitiescultureforum.com

About us BOP Consulting is a London-based international research and strategy firm specialising in culture, creativity and cities. BOP combines top-class research and analytical skills with an in-depth knowledge of the cultural creative economy. BOP works with national and city governments, support agencies and cultural and creative businesses, making use public and private resources to create supportive environments for the sector. Many of the company's projects result in published work, which is of the highest editorial quality and effectively targeted at policymaking and/or business audiences. BOP also manages and convenes the World Cities Culture Forum, which currently includes 40 global cities, among them Nanjing. www.bop.co.uk

Credits This report is written by BOP Consulting and associates David Adam, Poppy Lawrence Carr, Marina Guo and Tom Campbell.



Executive Summary

In recent years, world cities have increasingly understood and prioritised the role that culture can contribute to economic dynamism and quality of life. An essential element of this is the night-time economy (NTE): a wide range of activities, from visiting the theatre through to socialising in bars, which predominantly take place in cities during the evening and night. For both residents and visitors, such cultural experiences have become crucial in how a city is enjoyed and perceived.

As city leaders around the world seek to enhance their cultural offer, they have looked to expand and promote their night-time economies, not least as a means of developing their brands, building their international reputation and encouraging inward investment. However, with this growth so has come an increased awareness of some of the social and environmental issues associated with night-time economies, and also a better sense of the need for them to be carefully cultivated and managed. This is the case in world cities in both the East and West, with city governments adopting a range of approaches and strategies. It is therefore important to work with bodies such as the World Cities Cultural Forum to get an overview of the different policies, build up the evidence base and to share best practice so that all cities can work to develop night-time economies that are safe and enjoyable for citizens and visitors.

For many city leaders, the most urgent and challenging issue facing the night-time economy is the disruption associated with the COVID-19 pandemic. In many cases, the extent of the lockdowns and regulatory restrictions across the culture, entertainment and hospitality sectors has been severe and unprecedented. However, it is helpful to highlight the instances of resilience and innovation that have taken place in the face of this, and which can be expected to leave a lasting legacy in terms of shaping a city's cultural offer. These include: a more agile and flexible use of cultural venues, more advanced use of digital technologies as a means of consuming culture, and a greater emphasis on outdoor activities and animating the public realm. In the longer term, the social restrictions in so much of the world have underlined the fundamental importance of culture in facilitating human connection, and it is to be hoped that recovery plans and strategic thinking focus on the role that night-time economy activities can play in overcoming the threats of isolation and anxiety that have blighted so many citizens' lives at this time.

A city's culture and its night-time economy are the lifeblood of a city. Firms and workers are often attracted to cities because of their vibrant cultural offer, and the night is when they can experience it. As such when it comes to regulating and policy making for the night-time economy, it is not simply a question of more or less nightlife, any more than it is a question of more or less culture. A city's night-time economy policies need to be strategically embedded within a broader socio-economic vision for the city, and a need to provide a rich and diverse cultural experience.

When they are successful, night-time economies make important contributions to the city in terms of economy, image and reputation, and in enhancing the experience of the citizen. The extensive size of the night-time economy in cities such as New York and London is well known, but it is documented in world cities across the globe, and the importance of the night-time economy on overall tourism is well recognised – for instance, Nanjing, named 'annual city of night tourism' by the China Tourism Influence Prize, has seen its tourism industry achieve steady growth, reporting a year-on-year increase of 13.2% in overall tourism revenue in 2019. The reputation of a world city's renowned night-time economy tends to be resonant, often mediated through popular culture such as cinema, and will tend to endure over generations. Newer cities that are emerging as the world cities of the future, will likely see a similar effect in reputation as they continue to invest in their night-time economies. This is often being enhanced by the promotion of spectacles, festivals, light shows and activities that bring a sense of wonder to visitors and residents, and which are increasingly making use of audio-visual technologies.

A strong night-time economy is able to service multiple user groups. It is helpful to consider profiles of different participants in the night-time economy, with a view to identifying the range of requirements needed to meet their expectations. This report describes five such profiles: revellers, or party-goers, searching for the best bars and clubs; cultural lovers drawn to the metropolis for the thrill of the city experience; late-shift, or night workers who move between work and home and seek refreshment; families, who are especially important in those regions such as the Middle East and Asia, where climate and culture encourage their participation; and shoppers, who are again more significant in Asia and expect to undertake late-night shopping.

Allied to these distinct personalities, we can identify five principal areas that have the potential to boost the health of a city's night-time economy: audience and participation, and the need to develop a compelling experience that seeks to animate and make full use of the public realm; an enabling environment in which the night-time economy is underpinned by a well-functioning city infrastructure and transport network; assets, both in terms of established cultural institutions, but also more informal cultural assets, such as small music venues, bars and clubs; attractiveness, and the initiatives and promotion required to build a night-time economy's reputation; and finally leadership, with specific focus and policies to ensure good governance and management. Increasingly in cities around the world, this is being led by a dedicated 'Night Mayor', a specific person, or officer, responsible for mediating between industry, authorities and residents to help shape the success of the night-time economy.

In order to better understand how world cities perform around these five areas, we have developed and piloted a NTE index in 11 cities for this research, built with more than 30 indicators from across the five domains. Each of the cities was benchmarked for each indicator, and the cities were ranked on the basis of the average 'scores' across the domain indicators. Analysing the NTE index shows that newcomer world cities such as Nanjing are still growing their cultural assets, but given their investment levels, and promotional actions they will inevitably catch-up in the breadth and depth of their cultural offer. The NTE index also shows that Nanjing has performed well on its night-time retail offer, and that there is a particular opportunity for those cities seeking to develop late-night retail by integrating it with enhanced cultural experiences.

The points above, and the differing approaches and innovations with regards to managing the night-time economy, are illustrated by a number of case studies from world cities. Across the globe, in cities with a long-established night-time economy offers such as London, through to fast-growing cities in Asia that are seeking to better develop theirs, there is a great deal that can be learnt in terms of attracting different kinds of participants, and across the five policy domains. Ultimately, it is clear that the night-time economy is not just a policy area that can manage itself, and certainly not one that should be seen as a problem, because when well managed it can deliver significant economic benefits and enhance the reputation and attractiveness of a city. If this can be achieved, then it can be seen as part of a broader strategy to create more sustainable cities, places with a cultural offer that encourage human flourishing and happiness, just as much as they enable entertainment and intoxication.

1 Defining the night-time economy

World city economies thrive when they prioritise culture. A strong cultural offer contributes significantly to a city's reputation, attracting domestic and international visitors and creating positive feedback loops furthering greater economic, social and reputational benefits. The night-time economy (NTE) of a city is an integral part of city economy success, and is in reality defined by culture. The culture of a city comes to life at night: entertainment, gastronomy, cinema, theatre, dancing, live music and bars, in large part are experienced at night. They can also bring with them distinctive policy issues and tensions. As such, night-time economies require special attention by city leaders to ensure success.

This report is an investigation into the nature of the night-time economy in world cities. It explores the role of the night-time economy in shaping the identity and reputation of a place and asks what are the key factors and conditions that make for a healthy night-time economy? We survey the range of tools available to policymakers and cultural professionals by reviewing innovative practices from around the world. We explore the variety of city night-time economy practices and the contrasting approaches between regions such as Asia and Europe, and ask what they can learn from each other, and where night-time economy trends might be headed in a post-pandemic world.

→ Continues on page 12



Evening economy, Late-night economy, or 24hr Economy?

The term ‘night-time economy’ has its origins in the rapidly changing nature of our cities over the last twenty years, as cities clamoured to be recognised as world cities, cultural powerhouses, and places that ‘never slept.’ Cities have always been centres of vibrant cultural experience, but towards the end of the 20th century as cities moved from industry to financial and business services, becoming more international in character and attracting international tourists, they increasingly recognised the need to develop a strong entertainment and culture offer. The subsequent focus on the regeneration of city centres and the establishment of new cultural quarters also shaped the conversation on night-time economy in UK cities such as London, Manchester, and Birmingham. Increasingly post-industrial policy initiatives were being designed to stimulate economic activity through investment and regulatory reform. Having a strong night-time economy was seen as important not just in terms of its direct economic impact, but also as a means of stimulating wider economic benefits and inward investment. As Ken Livingstone, Mayor of London from 2000-2008, put it: “The reason London overtook Frankfurt as the financial capital of Europe is simple. Have you ever been stuck in Frankfurt on a Friday night?”

Discussions around the cultural offer of a city became central to the developing definition of what it means to be a World City. As city leaders sought to boost their night-time economies, so cities around the world became more ambitious, with pledges to create ‘24-hour economies’. As a result, definitions of the night-time economy can include a wide range of activities that take place between 6pm and 6am. But the trend of the early 2000s towards cities presenting a story of being fast-paced, competitive and centres for consumption is coming up against new challenges and new narratives. The experiences of rising inequality, social exclusion, inter-generational tension, and concerns around sustainability are leading many cities to seek greater balance in their growth model. The role of culture in shaping the trend towards a balanced, accessible, more human city will continue, and expectations around the nature of a city’s night-time economy are expected to follow suit.

Regional variety

Despite the pressures of globalisation towards convergence, the pattern of urban development across the world varies significantly. In Asia and in particular China, the rapid process of urbanisation has resulted in a growing number of megacities rapidly shifting functions and character, moving from industrial to service economies and developing distinctive cultural and tourist offers. These have been compounded by digital and audio-visual technologies that open up new creative possibilities for exploring the cultural life of a city.

As cities look to develop their own distinct cultural offers, so broader differences between East and West are emerging in terms of attitudes towards economic and social development. In the case of the night-time economy, this is reflected in the tone, emphasis and concerns of the discussions taking place. Discussion in a Western context often gives rise to concerns in relation to regulation, personal safety and anxieties with regards to alcohol consumption, whereas the discussion in Asia at present has a broader and more aspirational tone focussed on producing new experiences, broadening the current offer and exploring opportunities.

The World Cities Culture Forum works with cities in every region of the world, and wherever regional differences in attitude and approach are found it aims to understand the differences, highlighting contrasts in order to enable the network to learn from each other’s approaches. As such, it recognises that a range of approaches, evidence and policies can together contribute towards the shared endeavour of developing night-time economies that are culturally fulfilling and provide citizens and visitors with safe and enjoyable experiences.

2 New landscape emerging following recent COVID-19 pandemic

There can be little doubt that the COVID-19 pandemic of 2020 has disrupted the development of the cultural economy. In much of the world, cities have faced unprecedented and severe challenges, ranging from total lockdown to a myriad of regulatory restrictions and economic hardship across the culture, entertainment, and hospitality sectors, all of which are fundamental pillars of the night-time economy. Policymakers, cultural professionals, and business leaders have responded with innovative approaches to sustain existing business models and develop new routes to cultural provision. Some regions have been more pro-active than others in their response to COVID-19 as different national and city governments take different approaches. For some of the cities featured in this report its impact will be less of an issue than for others, however, given the complexity of the modern world and the degree of economic and social interdependence, COVID-19 provides a warning for the culture sector and an incentive to plan and strategise in the face of uncertainty and fast-changing trends.

Many commentators have pointed to the catalytic dimensions of the COVID-19 pandemic. Often, when our societies are experimenting with innovative technologies or responding to social and demographic trends, our approach to innovation can be somewhat hesitant, moving in a cautious probing manner. Crises like COVID-19 have a catalytic effect, encouraging us to act quickly, speeding up the adoption of technology, and quickly changing policy and business practices to remain competitive. For instance, through the pandemic, we have seen a greater digital adoption across a number of areas which have affected the cultural sector.

→ Continues on page 18



Areas of increased digital adoption which have affected the cultural sector:

- Meetings and conferences held online (fewer visitors to cities experiencing NTE)
- Adoption of entertainment streaming services (reduces participation in live events)
- Increased public subsidy of the arts (required to support sector)
- The move from cash to digital payment services (affects cash business in cultural sector, need to update systems to be viable)
- Online cultural consumption (e.g. shopping moving to major e-commerce sites such as Amazon and Alibaba, with a subsequent decline of the high-street and erosion of public space)
- Food delivery expansion over dining-out (increased regulation makes dining-out less appealing than eating in)
- Theatre/Cinema/Exhibitions/Events/Concerts moving to online – or reduced public attendance
- Greater adoption of E-sports and online gaming as result of fewer live sporting events (ease of transition to insular gaming experiences reduces sport participation)
- Sporting attendance changes to subscription/viewership (reduces live viewership, changes nature of the experience, revenues decline)

Many of these developments are not necessarily good or bad outcomes for the cultural sector but they do represent a phase shift, as few activities are likely to return to the way things were before. A new landscape is emerging, one in which our attitudes towards cultural consumption are being transformed. To give one example – there has been a surge in interest and demand for immersive reality experiences, in which entertainment is interacted with through virtual reality technologies and devices. Creative producers and artists are developing radically new forms of cultural experience for which there is increased demand and investment. In relation to the night-time economy, we can envisage a series of emerging trends arising from these challenges:

Reviewing attitudes towards public space

As a result of pandemic restrictions, cultural businesses have taken a number of steps to stay open, to even survive, and to continue to offer a cultural experience:

- Outdoor dining/drinking
- Animating outdoor space
- Outdoor entertainment options
- Redesign of public spaces as entertainment spaces
- Weatherproofing

Flexibility and agility towards international/domestic tourism demand management

The culture sector is well versed in the need for flexibility and agility. In our increasingly complex societies, a change in exchange rates, a security threat, a freak weather incident (for instance Eyjafjallajökull, 2010), can determine the fortunes of a sector highly dependent upon tourism and seasonal income. COVID-19 has reinforced the need for businesses and policymakers to have a range of responses if they are to successfully support an already fragile sector:

- Learning from seasonality, and the need to have a broader cultural offer and portfolio of attractions
- Agility in capital, resources and staff, with the ability to pivot and rapidly respond in terms of production and distribution of culture
- Re-thinking buildings and cultural venues, in terms of their ownership and long-term use

The importance of the role of culture in creating social connection

Culture is fundamental to facilitating human connection. Our city policymakers and cultural professionals have always known this, but lockdowns and restrictions have made the reality all the more prominent in the popular consciousness. It is possible that governments which overlook culture in their rush to restore economic stability are only likely to create more problems for public health down the line. Long-term planning and thinking must focus on the role that culture can play in overcoming the threats of isolation, depression, and anxiety.

3 The importance of culture in defining the night-time economy

A city's nightlife is its lifeblood. During the day, the city is host to economic and social activities such as work and schooling, but evening is for play, when citizens join visitors seeking cultural experiences. Firms and workers are often attracted to cities because of their vibrant cultural offer, and the night is when they can experience it. From this perspective, the night-time economy could be considered to be the essence or the lure of the city. Culture is integral in defining the night-time economy, without cultural activity the city at night becomes a ghost town, as often witnessed in central business districts in global cities, such as Wall Street or Canary Wharf in London.

As with many cultural activities, policy makers need to have a finely attuned sense of the regulatory and policy shifts which can derail or enhance the night-time economy. For instance, cities such as Sydney have experienced significant economic and reputational damages, when in 2014 a change to licensing laws resulted in venues needing to practice greater control over access, forcing lockouts and greatly reducing demand for nightlife. Such examples stand as a warning to city leaders who might overlook the importance of the night-time economy and culture in determining the success of their city. But when it comes to regulating and policy making for the night-time economy, it is not simply a question of more or less nightlife – discussions should be much more multi-dimensional than this. The objectives need to be strategically embedded within a broader socio-economic vision for the city, and a need to provide a rich and diverse cultural experience. Fundamentally, it is this range, rather than simply the size, which marks world cities out as having a successful and distinct night-time economy offer. For cities such as London, residents and visitors alike can progress over the course of the evening, from high-quality restaurants serving cuisine from around the world, through to a show at a renowned theatre and followed by socializing at a pub, bar, or nightclub.

Enabling such a diverse and sophisticated cultural experience depends upon having the infrastructure and high-functioning services (particularly with regards to the transport network) to ensure that residents and visitors can easily and safely navigate through a wide range of diverse cultural experiences.

4 The NTE contribution to placemaking and place brand

The night-time economy can make an important contribution to the city in a number of ways, in terms of economy, image and reputation, and in enhancing the experience of the citizen. For many visitors, whether coming to a city for business or tourism, it is the nightlife and cultural consumption undertaken during the evening that will dominate their impressions and memories of a city. In terms of wider and indirect perceptions, it is again the night-time economy that is so crucial to a city's brand. Whether it is Broadway theatre in New York, Dublin pubs, Tokyo restaurants or the dance clubs of Berlin, what happens in cities at night establishes an enduring reputation.

Enhancing the Economy

The night-time economy is recognised as making a significant contribution to wider city and national economies. Driven by cultural activity, the night-time economy in the United Kingdom has an estimated worth of £66 billion a year¹, with London representing up to 40% of this. London's night-time economy was reported by the GLA in 2018 to employ 1.6 million people, accounting for a third of all those working in the city.² Employee jobs in London's night-time economy also demonstrate higher than average growth compared to the wider city and national economy, with the sector growing by 2.2% p.a. compared to 2% p.a. for the city's wider economy, and 1.7% for the UK night-time industries between 2001 and 2017. The NYC Nightlife Economy report found that in 2016 the nightlife industry supported 299,000 jobs and \$35.1 billion in total economic output.³ Like London, the night-time economy of New York City has in many areas outperformed its wider economy, with the five-year annualised growth rate⁴ for jobs in the industry reported as 5%, compared to the city's overall job growth of 3%.⁴ This growth is not limited to London and New York, but is witnessed on a global scale, with world cities reporting similar trends. In 2018 the turnover of the

1 https://www.visitengland.com/sites/default/files/downloads/ve_theeveningnighttimeeconomy_0.pdf
 2 https://www.london.gov.uk/sites/default/files/london_at_night_-_executive_report_-_final.pdf
 3 https://www1.nyc.gov/assets/mome/pdf/NYC_Nightlife_Economic_Impact_Report_2019_digital.pdf
 4 Between 2011 and 2016

night-time economy in the City of Melbourne grew by \$310.3 million to reach \$3.5 billion.⁵ This growth trend was echoed in those figures reported for Melbourne's core night-time economy establishments and employment, which grew by 4.4% and 2.5% respectively between 2017 and 2018. As indicated previously, a city's night-time economy plays a critical role in its positioning as a tourist destination. Named 'annual city of night tourism' by the China Tourism Influence Prize, Nanjing's tourism industry has shown steady growth, reporting a year-on-year increase of 13.2% in overall tourism revenue in 2019.⁶

Building the Image

The reputation of a world city's night-time economy is especially resonant and will often be well known even for those who have never visited the city. It will often be mediated through popular culture (especially music, literature and above all cinema), and will tend to endure over generations – the famous nightlife in cities such as Paris or the counter-cultural scene in Amsterdam, for instance, were forged many decades ago. Newer cities that are emerging as the world cities of the future, will likely see a similar affect in reputation as they continue to invest in and grow their cultural assets.

Enhancing the Experience

In recent years, the concept of 'animating the city' has gained traction, with city leaders promoting spectacles, festivals and activities that bring a sense of wonder to visitors and residents. These are increasingly making use of audio-visual technologies with tools adapted from gaming and special effects industries and are becoming an essential element of the night-time economy offer. Large light shows such as Lumiere taking place across UK cities in London, Durham and Derry, or the animation of Quartier de Spectacle Montréal, have become iconic examples of enhancing the experience of the city. In particular, such experiences can (although by no means always) provide family entertainment, delivering spectacle and playfulness for children and young people, and without the bars and alcohol associated with the more traditional night-time economy offer.

5 City of Melbourne

6 Presentation at the Online Conference of World Cities Culture Forum, Nanjing Branding Night-time Economy with Culture and Tourism Activities, September 2020



5 Who participates in the Night-Time Economy?

A strong night-time economy is able to service multiple user groups. Citizens and visitors are seeking a range of experiences and activities although many may overlap. Here we have devised a number of characterisations or profiles of the potential participants in the night-time economy, with a view to identifying the range of requirements that be needed to be put in place to meet their expectations.



Revellers: The party-goers; fun-loving thrill-seekers, searching for the best bars and clubs. These fun-loving

city-dwellers are seeking to have fun from dusk till dawn. They need exciting venues, novel experiences, and to be part of the latest trend, possibly even defining it. But just as important, enabling systems, good late-night transport options with safety as a priority.



Culture Lovers: The culture seekers, drawn to the metropolis, whether visitor or resident, hoping

to enjoy the buzz and the thrill of the city experience. A night at the theatre, followed by dining out, before a cocktail on the way home. The night-time economy experience for this cohort relies upon interesting content, good night-time infrastructure such as transport, and leadership policies which will facilitate a safe experience.



Late-shift Workers: The workers – perhaps the forgotten part of the night-time economy – moving

between work and home and who need to grab a bite to eat before getting the late or early train home, or a refreshing beverage at the late-night food kiosk. NTE infrastructure, such as buses, metro and trains are fundamental to the experience of this group just as important is a sense of safety and safe passage home.



Families: The NTE is not only for young groups and young couples, the family is also a huge and important

part of the NTE in many world cities. In the Middle-East, Southern Europe, and Asia, where climate and culture enable and encourage participation of families. While this group is a more prominent participant in the NTE in Asia and the Middle East, there is an increasing trend towards creating NTE content and experiences in cities in Europe, but policies which help to keep the nightlife of the Reveller separate from their Family experience are crucial.



Shoppers: There is a cultural expectation in Asia and the Middle East that a feature of the NTE is the opportunity to undertake

some late-night shopping, the growth of air-conditioned malls in hot climates, has led to the creation of later opening hours with cultural experiences (e.g., Dubai Mall's Aquarium) that create NTE opportunities which aren't just about partying and experiencing culture. As our index shows, this an area with growth potential in the NTE. Currently retail is a feature which more predominantly part of the Asian NTE, but it is an activity for which there is potentially high demand.

6 Night-time economy Health-check:

We can identify five principal areas with the potential to boost the health of a city's night-time economy:

Audience & Participation: A strong night-time economy must focus on its audience; on developing a compelling experience and enabling both citizens and visitors to participate. Participation is fundamental, city leaders should seek to create the conditions to enable creative professionals to create content, enabling all to take part in every part of the life of the city. Increasingly the physical space of cities is being redesigned for the needs of people where once it was designed for machines. As a result, the animation and curation of public space requires as much consideration for the night as it might for the day.

Enabling Environment: A flourishing night-time economy must be underpinned by a well-functioning city infrastructure and integrated public services if it is to be enjoyed in a manner that is safe and well managed. This is particularly the case with regards to the transport network – both in terms of public transport provision (underground and bus services) but also in ensuring that taxis and private transport is safely regulated and fairly priced. While a specific leadership or championing role might be helpful (see NTE Leadership), it is often more a case of ensuring that considerations around supporting the night-time economy are embedded within a broader policy framework and investment plan for the city's infrastructure and services as a whole – a city with inadequate or patchy public transport during the day, is unlikely to provide the level of service required at night. For instance, do they have late night transport? Or 24-hour convenience stores and pharmacies?

Night-time Assets: In recent years, world cities have increasingly invested in building up and protecting the cultural infrastructure and assets deemed necessary to be seen as global cultural powerhouses – art galleries, concert halls, museums etc. Along with this, more thought needs to be given to protecting the assets required for a flourishing night-time economy, many of which will be smaller and more informal, but which are an essential element of a distinctive and innovative cultural life. Too many cities have had the same experience as London over the last decade, where investment in new, large venues and cultural districts (e.g. King's Cross) has also been accompanied by a steep decline in the number of pubs, nightclubs and small music venues. A commitment to protecting (and also measuring) these cultural assets is crucial.

NTE Assets

Culture	Retail
Number of cinema screens	Late night retail business
Number of theatres	Number of nightclubs, karaoke, clubs
Number of music venues	Number of Restaurants

NTE Attractiveness: A city's reputation for night-time activity is a crucial factor in determining its overall attractiveness. Overnight tourists are a good indicator that the city's NTE is appealing. Similarly, the city's reputation for a good quality of life is also a significant indicator that the city is safe, clean and attractive to visitors and residents. But there are specific night-time initiatives that can be created to enhance the cultural offer and animate the night. These might include: 'lates' programmes; opening museums and galleries beyond normal opening times, encouraging a night-time offer in public spaces, such as lightshows, night-walks, excursions and immersive experiences which bring the city to life.

NTE Leadership: As the night-time economy of a city grows and becomes more successful, specific attention is required to ensure good governance and management. Special policies might be required by city leaders including undertaking research to gather evidence and make assessment of the city's NTE assets; undertaking consultation with the night-time industries such as the hospitality sector to better understand their requirements; putting a NTE strategy or policy in place; or establishing cross-departmental working mechanisms to coordinate between transport, police and industry taskforces – an office of NTE. Finally, establishing a post for a Night Mayor or Tsar, a specific person responsible for mediating between industry, policymakers, regulatory authorities and residents to help shape the success of the NTE. Currently more than 40 cities worldwide have established a post for someone responsible for the NTE or created an office or initiative to manage this crucial dimension of the city economy and cultural life.

NTE City index – 30 indicators across the five domains

Domain	Category
NTE Assets	Cinema Screens
	Theatre / Concert hall
	Museum
	Bookstore
	Performing Arts
	Festivals and celebrations
	Retail
	Food & Beverage
	Night club /KTV
	Permanent night market
Audience and participation	Theatre attendance
	Cinema attendance
	Festival attendance
NTE Attractiveness	City brand
	Domestic and international overnight tourists
	Night programmes by cultural institutions
	Night-time offer in public space
Enabling Environment	Liveable City/ Quality of Life
	Late night transportation
	24H Service
NTE Leadership	Night Mayor
	NTE Policy
	NTE Strategy
	NTE Management

Constructing the NTE index

In order to better understand how world cities perform around these five areas, we have developed and piloted a NTE index in 11 world cities for this research. The NTE index was built based around 30 indicators across the five domains. Each city was benchmarked within the cohort cities for each indicator. The cities' ranking for each domain was based on their average 'scores' across the indicators within the domain.

NTE City index – the top six

	Audience & participation	NTE Attractiveness	Enabling Environment	NTE Leadership	NTE Assets Culture	NTE Assets Retail
1	New York	London	Melbourne	Chengdu, Shanghai	London	Shanghai
2	Amsterdam	New York	Shanghai	–	Los Angeles	Chengdu
3	London	Amsterdam	London	Amsterdam, Guangzhou, London, Nanjing, New York	New York	Guangzhou
4	Melbourne	Chengdu	New York	–	Melbourne	Los Angeles
5	Guangzhou	Los Angeles	Guangzhou	–	Shanghai	Nanjing
6	Nanjing	Guangzhou	Amsterdam	–	Tokyo	Tokyo

Data for the NTE index was collected by BOP Consulting and iiMedia.

NTE City Index: New York, Tokyo, Amsterdam, Melbourne, Nanjing



Our graphic here sets out the research data in a manner which reveals some insights as well as intuitive conclusions. Cities such as New York, with a well-established reputation for a vibrant nightlife and cultural life, perform strongly in their attractiveness, audience engagement, cultural assets and in taking leadership, while smaller cities such as Melbourne punch above their weight in having created an enabling environment for the NTE. Newcomer world cities such as Nanjing are still growing their cultural assets, but given the size of this city - and cities like them in China - their investment levels and actions to promote their story mean that they will inevitably catch-up in breadth and depth of cultural offer.

The data also reveals a further insight on the types of cultural asset which constitute the night-time economy. We have separated the indicator for night-time assets into retail and culture so as to demonstrate this finding. Nanjing has performed very well on its night-time retail offer, on a similar level to the well-established Tokyo, and even better than New York. This reflects a cultural difference in approach to the NTE between Asia and the West; the NTE in Asia is geared towards multiple audiences, including Shoppers and Families, whereas the cities in North America and Europe are perhaps focused more on the experience of the Reveller. This factor is reflected in the leadership policies of non-Asian cities which tend towards safety, management, and control, whereas Asian cities policies are focussed on creating more, new, and innovative content. These findings suggest an opportunity for growth for cities who want to develop late-night retail and are able to integrate it with enhanced cultural experiences. When this fact is understood next to the Audience and Participation data point, we might surmise there is a ready-made demand which might be matched to improved supply.

7 Case Studies

Amsterdam

Bangkok

Changsa

Chengdu

Nanjing

Montreal

London

Melbourne

Tokyo

Audience and participation: Amsterdam

Amsterdam is a city with an international reputation for 'nightlife'. Its well-established image as a home of liberal and tolerant policies towards sex, drugs and lifestyle makes it one of the most popular visitor destinations in Europe, attracting over 19 million tourists per year. The city has decided to embrace its reputation and to put in place measures to manage the tension between nightlife and maintaining a functional city for its residents. In establishing the post of the Nachtburgemeester or Night Mayor - the first of its kind - the city sought to manage the relations and expectations of businesses and residents, someone to be a conduit between differing interested parties, to help establish a consensus and move the NTE forward. The office of the Nachtburgemeester sought to create greater safety and better managed public space with stewards and signage to better regulate the area. It successfully lobbied for the 24-hour licences across the city and introduced a pilot scheme for 'square hosts' to steward in public areas. As a result, the city has seen nuisance reports reduced by 30%, and reports of violence down by 25%.

★ Example: 24-hour licence

In 2012, the Mayor of Amsterdam first brought in the 24-hour nightlife permit at Trouw nightclub to experiment with the expansion of the opening hours of selected nightclubs and the impact on the city's nightlife. Subsequently, an open call was put out for business owners to apply for a 24-hour permit. A team of experts consisting of industry professionals, the office of the Nachtburgemeester, and city employees were asked to assess these proposals. The introduction of the 24-hour nightlife permit also incentivized urban development and tourism. The permit specifically targets venues outside of the city centre to ensure that clubs and all-night destinations would be more spread out over the city. According to the evaluation report⁷ of this pilot scheme, clubs outside of Amsterdam's city centre stated that approximately 20% of their visitors came from abroad. The new permits have helped to alleviate the growing tourism pressure on the city centre by encouraging more tourists to visits different parts of the city other than the usual tourist spots. In 2020, 6 more permits were granted which brought the total number of 24-nightlife permit owners to 15.

7 <https://amsterdam.raadsinformatie.nl/document/5938280/1/09012f978220d97d>



Audience and participation: Nanjing

Nanjing is an ancient city with 2,400 years of history. Nanjing was known to be the Capital of Six Dynasties since 229 AD - Eastern Wu, Eastern Jin dynasty and four southern dynasties. Today, Nanjing is proud to be the home of one UNESCO designated World Heritage site, with two other sites listed on the China World Heritage tentative list. Furthermore, Nanjing has nine heritage streets designated by the national and provincial governments. In 2019, Nanjing welcomed 147 million international and domestic tourists, with a tourism revenue totalling 278.5 billion yuan.⁸ The city of Nanjing announced the “Implementation Guidance on Accelerating the Development of Night-Time Economy “ in 2017, which outlined Nanjing’s ambition in developing “Jinling at Night” into a well-known night-time cultural offer in the country, and improving the sales revenue from its night-time economy pilot zones to reach 4% of the city’s retail sales revenue.⁹ Leveraging policy support and rich cultural assets, Nanjing has created a diversified night-time offer covering the areas of food and beverage, hospitality, transportation, travel, shopping, and entertainment on the basis of the traditional night market model. Among them, food and cultural tourism proved to be the most appealing offer.

★ Example: Changjiang Road Historical and Cultural District

Nanjing’s Changjiang Road is another popular site of Nanjing’s night-time cultural tourism. Spanning a history across 1,800 years, many of the historic buildings and sites along the Changjiang Road have been preserved. Jiangning Weaving Museum, the Six Dynasties Museum, and the Plum Garden Memorial Hall of the Chinese Communist Party Delegation on Changjiang Road have extended opening hours until 10pm, and offer a large programme of events such as ‘The Elegance of Six Dynasties’ and the youth version of the Yue opera ‘Dream of the Red Chamber’. In addition to night museum tours, Changjiang Road also launched eight night-time cultural programmes, including Night Antiquities Market, Night Performance and Night Shopping, In Search of Night Delicacy in Alleys, Night Gallery Tour, and Night Reading. By combining retail, cultural and business travel with the night-time economy, Changjiang Road was renewed and created a richer type of night-time cultural travel and consumption cluster.

⁸ http://jxw.nanjing.gov.cn/njsjjhxxhwyh/201908/t20190813_1624800.html

⁹ http://swj.nanjing.gov.cn/njsswj/201810/t20181021_483463.html





✧ Example: Confucius Temple - Qinhuai Scenic Area

The Confucius Temple in Qinhuai District, once the most prosperous part of Nanjing from the Six Dynasties to the Ming and Qing Dynasties, was regenerated into a traditional ancient market in the 1980s. The design of the Confucius Temple Scenic Area combines regional characteristics with modern culture to develop into a space of “three streets and one business district”, including Gong Yuan Street, which is themed as a ‘cultural and museum exhibition experience street’; Gongyuan West Street themed as a ‘local brands shopping street’; Dashiba Street, themed as ‘Qinhuai food street’; and a business circle composed of Water Tour City, Horizontal Square and Maoye World. Annually, the Confucius Temple and its business district received 50 million visitors. In 2019, the revenue of Confucius Temple Pedestrian Street reached 11.1 billion yuan, and consumer satisfaction rate was as high as 95%. Confucius Temple was rewarded as one of the top ten tourist night scenic spots in 2020.¹⁰

Recently, the Confucius Temple Scenic Area has started to integrate emerging technologies and creative design to develop an ‘immersive’ and rich night-time offer. Confucius Temple has developed a comprehensive tourism development strategy, which will include building an immersive cultural tourism complex - Qinhuai Theatre Alley – to incorporate landscapes, performance and entertainment, retail businesses and creative immersive experiences. In April 2019, the first 5G smart boat cruised on Qinhuai River to present the ‘Present and Past of Ten Miles Qinhuai’ through 360-degree VR and Cloud VR. Confucius Temple also pioneered the application of immersive experiences in its themed hotels. Nanjing Confucius Temple Cultural Tourism Group has developed a popular hospitality cluster which consists of seven cultural themed hotels such as the Jinling Painting and Calligraphy Gallery, Qi Feng Inn and Tao Ye Du Inn. During the National holidays in 2020, the occupancy rate was 90%.

NTE Attractiveness: Montréal

Montréal is a city renowned for its nightlife, culture, and hospitable nature, and has been referred to as Canada's Cultural Capital. Being at the confluence of the French and English traditions, Montréal has developed a unique and distinguished cultural face in the world. Montréal is the home of the famous Cirque de Soleil, and various theatre and ballet companies and musical performances, as well as an array of restaurants and bars.

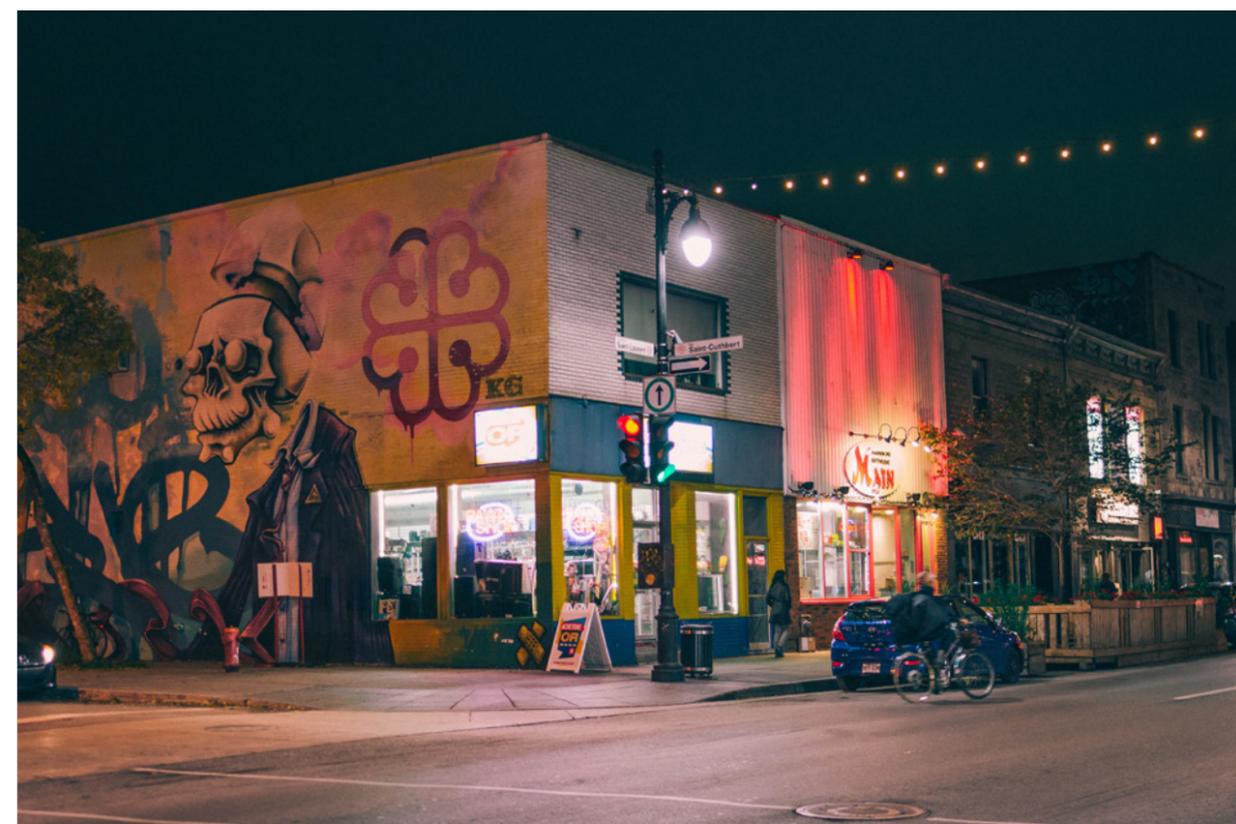
The most attractive tourist destinations are those that offer an array of entertainment options for different ages, cultures, and lifestyles, including families. This requires private as well as public attractions, and night-time leisure activities not associated to the consumption of alcohol.

Andreina Seijas, an urban night researcher

Montréal is a recognised tourist destination attracting millions each year, with a quarter of all visitors saying they come to enjoy the city's cultural offer. Montréal hosts some fantastic events all year long, from the Montréal International Jazz Festival and the International Fireworks Festival, to the Just for Laugh Festival and the Montréal Beer Festival, and in 2016 was ranked the 7th Festival City in the World.¹¹ Montréal has cemented its position as the party capital of Canada, offering the best night-time entertainment and attractions, from live music, mainstream clubbing and underground hideaways to elegant cocktail bars. Its bustling nightlife is attributed to its relatively late 'last call' at 3am, a large university population, a legal drinking age of 18, and the excellent public transportation system. These factors in combination with other aspects of Montréal's culture make the city's nightlife unique. The diversity of the clubs in Montréal attests to the popularity of its nightlife, with night clubs, pubs, bars and singing bars and jazz clubs all attracting different types of customers. The night-time economy makes a significant contribution to the city, with 52,000 people employed in the 4,000 restaurants and 400 bars located across Montréal.¹²

11 Thrillist

12 Monocle Magazine, 2016



Governing the night-time cultural metropolis is a challenge. The emergence of MTL 24/24 and a new Noise and Night Commissioner at the City of Montréal offers a resolution to the challenge of urban governance after dark. MTL 24/24 is a non-profit organization that bridges the gap between various cultural players in Montréal's nightlife by means of promoting night culture for the benefit of the city's nightlife as a whole. By forming Montréal's first Night Council of nightclubs, artists, curators, record store owners, promoters and any other complementary sectors, this grassroots bottom-up initiative aims to accelerate the collaboration between the City of Montréal and stakeholders of the night-time economy, particularly artists, event organisers, shopkeepers, researchers and citizens. Recognizing nightlife as a priority, the City of Montréal will develop a night-time policy for Montréal by 2021 to further stimulate night-time economic activity while promoting harmonious cohabitation between uses.



Courtesy of Montr al en Histoires

★ Example: Cit  M moire Experience

Cit  M moire (City Memory) is one of Montr al's cultural landmarks and a flagship immersive experience, covering a range of city milestones and offering visitors and residents the opportunity to meet with both famous and lesser-known characters who have played witness to the history of the city and its evolution over time.

Appearing throughout Old Montr al, Old Port of Montr al and at Fairmont The Queen Elizabeth Hotel, the experience is projected directly on to the surrounding walls, the ground and the trees. City Memory projections 'express the values of co-existence, innovation, tolerance and generosity that are considered to be the foundation of the city'. The Montr al en Histoires free App is the best way to learn about Montr al's history, with virtual and augmented realities, as well as points of interest. New virtual reality terminals in public spaces create the immersive experience without a VR headset, enabling visitors to enjoy the city storytelling as part of a real or virtual environment.



Courtesy of Montr al en Lumi re / Fr d rique M nard-Aubin

★ Example: Montr al en Lumi re

Montr al en Lumi re (Montr al Festival of Lights) has been described as one of the world's largest winter festivals, taking place in Montr al every February for two weeks. First launched in 2000, making it one of Montr al's longest running festivals, Montr al en Lumi re now welcomes more than one million visitors each year, and includes a diverse programme of performing arts, live music, outdoor performances, light installations and fine food and wine. Reanimating public spaces in the city, with Place des Festivals' acting as the focal point of the festival, Montr al en Lumi re has positioned Montr al as an essential winter destination.

NTE Attractiveness: Chengdu

Chengdu is a large city with a population of over 500 million people in the surrounding 1000-kilometre hinterland. As the quality of life and level of consumption improves, Chengdu is heavily promoting its night-time offers around dining, shopping, entertainment, and tours. In 2019, the Chengdu government launched ‘the Implementation Guidance from the General Office of the Chengdu Municipal People’s Government on the Development of the City’s Night-time Economy to Promote the Upgrading of Consumption’ which outlines the city’s efforts to improve public services at night and optimise the business environment to enhance the vitality of its night-time economy. The contribution of Chengdu’s night-time economy was significant during the pandemic – in the first six months of 2020, revenue generated in the evening accounted for 60% or more of the total revenue for nearly 60% of the restaurants in the city. The 2019 Chengdu Night-time Economy Report also suggested that Chengdu’s night-time economy accounts for 45% of citizen’s daily expenditure, which is the highest among Beijing, Shanghai, Guangzhou, Harerbin, Xian and Changsha.

★ Example: Embedding culture into daily nightlife

Chengdu is known for its laid back, optimistic and leisurely lifestyle, mainly reflected in its theatre and family friendly activities. In 2019, Chengdu hosted more than 180 cultural activities, with attendance at plays, dramas and musicals having been particularly popular during the National holiday week over the past two years. In addition, tea-drinking while listening to Sichuan opera has become a symbol of Chengdu’s lifestyle. On TikTok, there are currently 19,000 videos with 270 million views under the hashtag of #Chuanopera Biannian [Sichuan Opera face changing performance].

In terms of family-friendly activities at night, Chengdu has introduced night-time zoos, circuses, theme parks, children’s restaurants, children’s cinemas, picture book galleries and other parent-child projects. In addition, the city extended the opening hours of children’s playgrounds in Jinjiang Park, Tianfu Greenway and other open spaces; and encouraged museums, botanical gardens, bookstores and communities to organise night-time excursions and sleepovers, book clubs, outdoor camping and other family-friendly activities.



★ Example: Jinli: “Night District Governor” and Coordinated Development

Jinli was one of the oldest and most vibrant commercial streets in the Western Shu history, dating back to the Qin, Han and Three Kingdoms periods more than 1,800 years ago. In 2018, it was visited by more than 18 million people. Jinli was the only place in China amongst the top 21 world’s most beautiful streets featured by CNN Travel in 2019. Jinli is more buzzing in the evening than during the day, with 3pm to 8pm tending to be the peak time for tourists. The strong night-time economy at Jinli can be attributed to effective policies and measures. In September 2019, Wuhou District, where Jinli is located, launched the “Ten Measures for the Development of the Night-time Economy”, which draws on international experience to establish a Night Governor position at the district, street and community level to coordinate the development of the night-time economy. The governments of districts and counties are encouraged to designate 100 night-time economy pilot zones. Specific work within these zones focuses on creating a quality night-time consumption environment, optimising night market operations appropriately, encouraging complementarity between different night-time retail offerings, innovating night-time economy marketing, improving supporting facilities, creating night-time landscapes, and strengthening night management to support the development of the night-time economy.

NTE Leadership: London

With the establishment of London's Mayoralty in 2000, the city once again had a direction and leadership after a fourteen-year hiatus. The new Mayor quickly established a vision which accelerated the city's trajectory towards global city status. London in the early 80s had been a city experiencing industrial decline, which some Londoners recall as a city which was slightly shabby and at times a bleak experience. In 2000, the new Mayor Ken Livingstone immediately set in motion a series of initiatives and policies with the ambition of positioning London's reputation as a leading world city alongside its peers of New York, Paris and Tokyo. The course set would ultimately lead to London hosting the Olympics in 2012, but the start point required the city to reform its tourism promotion infrastructure, creating a new private sector-oriented organisation in Visit London. Licensing laws also needed reform in 2005, to enable late night drinking, with Tony Blair declaring that those "who want the ability, after going to the cinema or theatre say, to have a drink at the time they want should not be inconvenienced, we shouldn't have to have restrictions that no other city in Europe has".

As London's cultural life flourished so too did its reputation as a world city. Still further measures were required to enable the city to function with a strong night-time economy. The introduction of the Night-tube under Mayor Khan in 2014 facilitated the next step in London's NTE, moving it towards a 24-hr economy, creating potential for longer opening hours for hospitality, entertainment and cultural sectors. Finally, in 2016, London appointed a 'Night Czar' a co-ordinating role to work with industry, legal authorities and local government to continue to drive towards a 24-hour economy but still ensure the safety and wellbeing of citizens was held in balance between growing the economic activity. According to the Mayor's research, London is facing a significant challenge to its cultural infrastructure, and over the past 20 years has seen a significant drop in the proportion of pubs, grassroots music venues, LGBT venues and nightclubs. The Mayor has responded with a special NTE commission and a commitment to address the matter, but the challenge is likely to be exacerbated by COVID-19.





★ Example: The Grassroots Music Venue Rescue Plan

Initiated in 2015, the Grassroots Music Venue Rescue Plan looked to respond to the recognised rapid decline in grassroots music venues in the city, understand their contribution to London's culture and economy, and therefore the impact of their loss. The plan reported that between 2007 and 2015, London lost more than a third (35%) of its grassroots music venues. Set in motion by the Mayor of London, the initiative was delivered in three phases, with the first two phases delivered in 2015 and the final phase delivered from 2016 onward:

- Music Venues Taskforce
- London's Grassroots Music Venue Rescue Plan
- Implementing the Rescue Plan

As part of this initiative, the Taskforce produced a series of recommendations, the implementation of which is being delivered by the London Music Board. This included the appointment of London's first 'Night Czar', following the Night Mayor model seen in other cities, as an individual positioned to champion the night-time economy and to co-ordinate and mobilise industries, legal authorities and the local government.

Produced in January 2017, the Rescue Plan Progress Report indicated that there was no net loss of grassroots music venues in London for the first time in ten years. That said, research from City Hall has demonstrated that there is still a recognised high risk of continued venue closure, in response to which a Culture at Risk Officer has been appointed to support such at risk venues.

Enabling Environment: Melbourne

Melbourne was awarded the title of Most Liveable City by The Economist Intelligence Unit seven years in a row from 2011 to 2017 and continues to rank highly in the index. Considered the ‘cultural capital of Australia’, Melbourne is home to just under 400 festivals and celebrations, with its main festival attended by 26.8% of the city’s population of almost 5 million residents. The city’s night-time economy is growing at a faster rate than the wider region, with growth trends visible in turnover, employment and number of establishments, driven by the performance of Melbourne’s entertainment and food sectors.

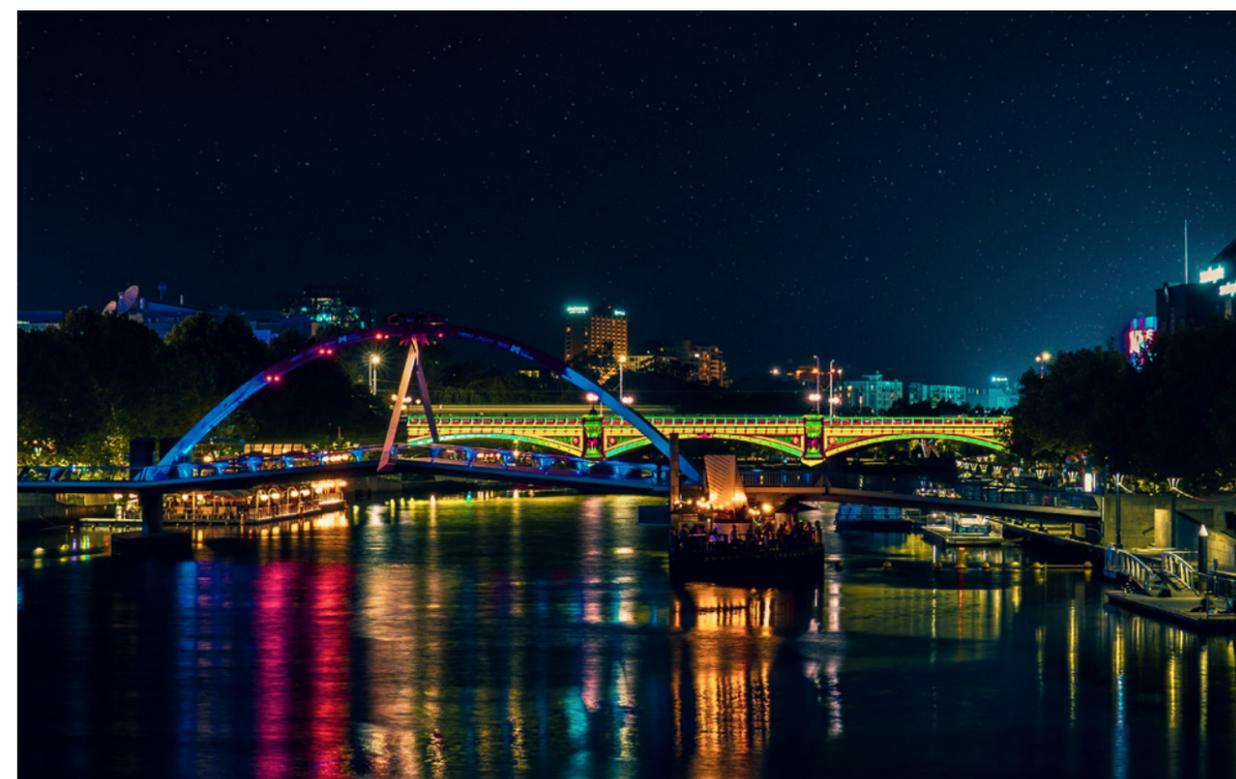
26.8%

of the population
attended the city’s
main festival

Melbourne has a thriving live music scene, which plays an important role in the cities’ night-time economy. The strength of the sector has resulted in much of the current research, policy development and advocacy around Melbourne’s night-time economy being affiliated with the sector, with one such example being the 2018 Victorian Night-time Economy Summit presented by

Creative Victoria, Music Victoria and Melbourne Music Week. The Summit was described as being targeted at those who would benefit from the opportunity to build relationships and partnerships that would lend themselves towards the development of a stronger night-time economy, namely musicians, people working within the industry, urban planners, culture departments, nightlife operators and tourism and trade associations.

The Council of Capital City Lord Mayors Local Government Safe Cities Network has in recent years regularly commissioned “research into the value and structure of [Australia’s] night-time economy”. This research has demonstrated the rapid growth of Melbourne’s night-time economy, and highlights the entertainment sector as being the key driver for this growth.



✦ Example: Nocturnal, Melbourne Museum

Nocturnal at Melbourne Museum was established in 2017/18 as an event combining museum experiences, such as tours and talks, with live performances from emerging musicians. Melbourne Museum’s Nocturnal events programme offers “transformational after-hours experiences for adult audiences”, contributing towards the Museum’s objective to reach new audiences through targeting programming towards young adults. The event series has proved highly popular, attracting 17,455 visitors in its first year (2017/18) and 13,527 in its second (2018/19), 17% of which were reported as first-time visitors.

Creative partnerships are described as having become “a signature strength of the Nocturnal programme”. As part of the series, Melbourne Museum has collaborated with a variety external partners, including VAMFF (Melbourne Fashion Festival), Melbourne Writers Festival, Melbourne International Jazz Festival and Midsumma Festival, in addition to a wide range of performers, artists and creative practitioners. In addition to the strengthening of creative partnerships, the Nocturnal programme has strengthened relationships between the Museum and key regional partners including Music Victoria and the City of Melbourne and has allowed for greater alignment between this and other city and regional initiatives.

Night-time Assets: Bangkok

Bangkok is one of the top destination cities in South East Asia and the globe. It topped the latest Global Destination City index against other major destination cities such as Paris, Singapore and New York, receiving over 23 million tourists internationally in 2018, and its diversified night-time offer, which incorporates culture and creative experiences, plays a huge role in its success. Bangkok, also

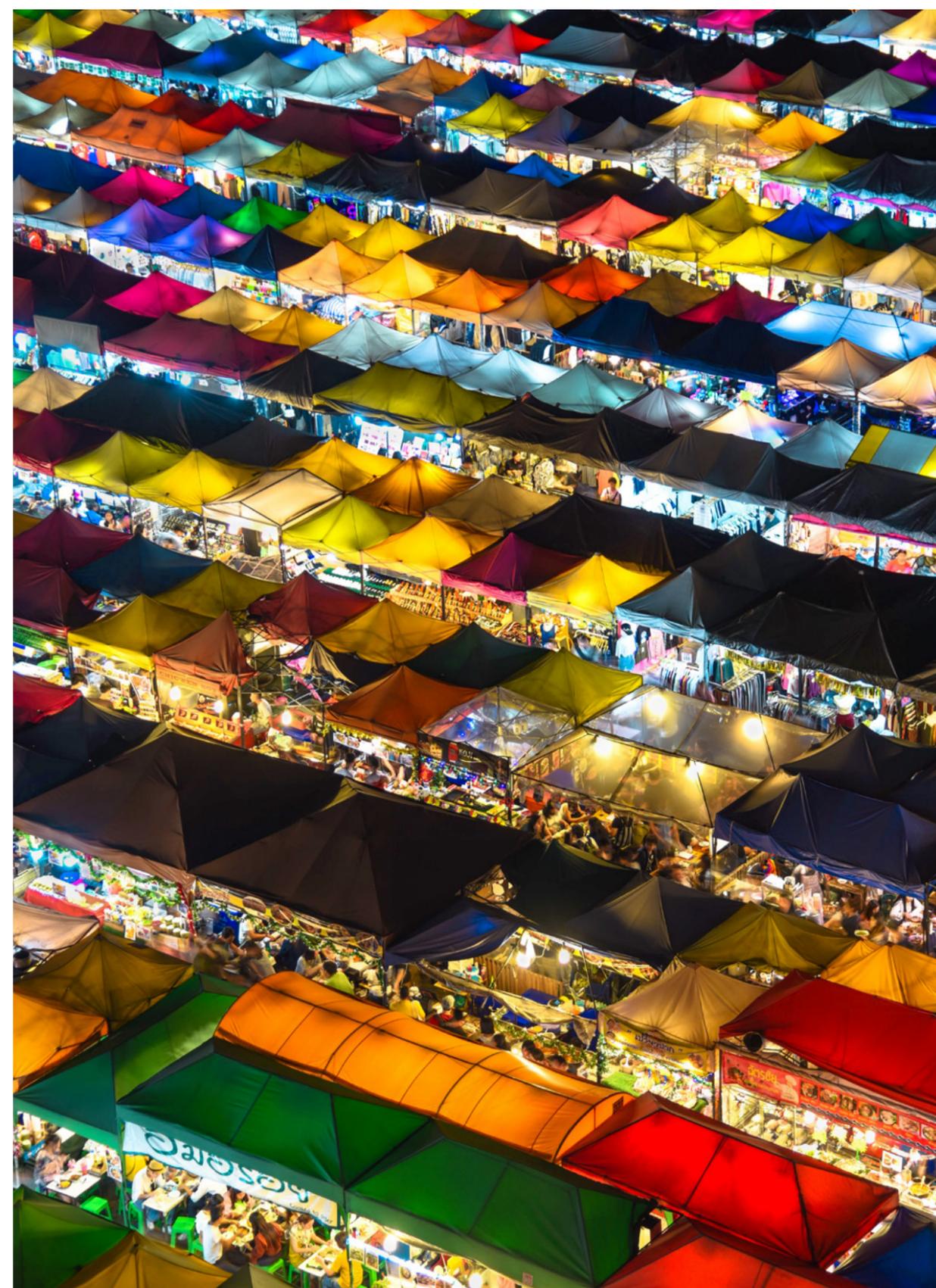
\$20b

Bangkok's revenue from International visitors in 2018

known as Krung Thep (City of Angels) by the locals, is the most populous city in Thailand. Both an economic and a tourism powerhouse, Bangkok is the first place to visit for international travellers, particularly amongst Chinese, Malaysian and Japanese tourists. According to MasterCard Global Destination City Index, Bangkok has been rated as the top global destination city for four consecutive years.

Nightlife and night-time activities are certainly the key features of Bangkok's tourism offer. Beyond what it is traditionally known for, such as nightclubs and food markets, much of the recent efforts have been focused on developing a more diversified night-time offer by combining retail with culture and creativity.

Culture and the creative industries have been a key pillar of Thailand economic transformation in the past two decades. The establishment of the Thailand Creative & Design Center in 2005 represented an important milestone for embedding CCI into the city's tourism and urban regeneration. Many recent popular destinations such as the Train Night Market Ratchada and Chang Chui Creative Park reflect strongly on the city's historic legacy and creative endeavour. Thailand's government's strategic move to advance its MICE industry (meetings, incentives, conferencing, exhibitions) was crucial in putting Bangkok on the international map for events and exhibitions. In 2017 Thailand's government combined three major trade shows: the Bangkok International Fashion Fair and Bangkok International Leather Fair (BIFF & BIL), the Bangkok International Gift Fair and Bangkok International Houseware Fair (BIG+BIH) and the Thailand International Furniture Fair (TIFF) into STYLE Bangkok Fair which is now the centre stage for approximately 1,000 brands and nearly 2,000 booths from local, regional, and international vendors to display their creations for the world in true Thai style. Other regular cultural events such as Bangkok Design Week and the Bangkok Art Biennales also help to draw international tourists who are interested in arts and culture, as well as food and shopping.





✧ Example: Chang Chui Creative Park

Chang Chui is one of Bangkok's latest mixed-use creative spaces in the less-popular Thonburi district. The 27,000 sqm creative park is a collection of 18 buildings with each structure being made from reused materials and with a full-size decommissioned L-1011 TriStar Lockheed airplane placed right at the centre of the park. Equipped with a co-working space, artist studios, performance and exhibition spaces as well as food and retail spaces, Chang Chui is intended as a comprehensive and functional creative park with multiple uses that vary according to the time of day and according to the types of visitors. The park is organised into two zones - the alcohol-free 'green zone', which is open from mid-morning until late evening, and the 'night zone', which opens from late afternoon until late night. The 'night zone' features areas for live music and theatre performances, bars and craft beers, as well as local designs and fashion boutiques. Although there are plans to open the TriStar Lockheed space as an exhibition space and restaurant, the plane is currently only open for special occasions, but remains as the icon of this increasingly popular 'Plane Night Market'.

✧ Example: 24-hour Shopping Malls – Samyan Mitrtown

Leveraging on the late-night lifestyle of Bangkok, 24-hour openings have become an attractive feature for shopping malls to attract footfall. The Street Ratchada which was opened in 2015 was known to be the first 24-hour large-scale shopping mall in Bangkok, where its food and beverages offer as well as amenities such as pharmacies and post offices are open 24-hours a day. Samyan Mitrtown, a 6-storey building with a total leasable area of 36,000 square meters retail space is a new 24-hour shopping mall located in Sam Yan area just beside Chulalongkorn University. Targeting a young-clientele, it embodies a learning philosophy and was developed under the concept of the Urban Life Library – Food and Learning Library to create a 24-hour living space for the local community – students, workers, freelance start-ups – and tourists. Significant thought was put into the design, artworks and layout of the mall, which is linked directly to the metro station by a rustic underground pathway which has become a popular destination for photoshoots. Unlike the Street Ratchada where most of the 24-hour shops are food and amenities, Samyan Mitrtown has a large variety of 24-hour offers including bookstore C Asean, lifestyle accessory shop Miniso, and even a co-working and learning space. In addition to this, Samyan Mitrtown also has a multi-purpose hall for events and is home to House Samyan, an alternative cinema screening independent film.

Night-time Assets: Changsha

Changsha is one of the first designated national heritage cities with a history of 3,000 years. Tencent rated Chengsha in the “Top 10 Most Influential Cities for Night-time Economy in China”. Amongst the night-time strategies in major Chinese cities, Changsha’s strategy in making use of KOL (Key Opinion Leaders) on social media presents itself as an interesting case study.

168M

Domestic and foreign tourists in 2019

Leveraging its rich cultural heritage and the strategic advantage of being headquartered by a major broadcaster Hunan Broadcasting System, Changsha has created a strong city brand which attracts both domestic and international tourists. Over 168 million domestic and foreign tourists visited Changsha in 2019, contributing

to a total tourism revenue of 203 billion yuan. During the National holiday week in October 2020, Changsha received nearly 8 million tourists. As of October 2020, #Changsha has been tagged over 1.12 million times and read 2.5 billion times on Weibo; and #Things about Changsha# has been tagged more than 4.53 million times and read 13.76 billion times. On TikTok, there are 91 Changsha-related topics, and the most played topics are #Changsha# (14.99 billion times), #Changsha Food# (560 million times) and #Hunan Changsha# (394 million times).

The Changsha Municipal Government fully recognises the potential of “KOL” [Key Opinion Leader on social media] economy and uses it to actively promote the innovation of long-established brands and products, emerging local brands, local products such as Fire Palace, Yang Yuxing, Yulou Dong, Wenheyong Xiao Long Shrimp and Tea Yangyesi, as well as popular destinations such as Pozi Street. During the National holidays in 2020, social media was full of posts about Changsha’s busy shops and streets. Driven by online marketing, Changsha’s culture and brand continue to be exported to the rest of the world, and Changsha has become synonymous with being a KOL city.



Example: Orange Island: KOL programme and fireworks display

Orange Island is located within the Changsha Yuelu Mountain Orange Island Tourism Zone, a national 5A level scenic area. The Orange Island which stretches across 5km has 30 attractions, recreational facilities, tourist buses and tourist trains. Orange Island programmes regular cultural events such as Orange Island Holiday Concert, Xiang Opera performance at the Orange Island Intangible Heritage Museum, and the New Guozhao Han Costume Festival.

The Orange Island Fireworks Display is held at the Orange Island Plaza on New Year’s Day, Lantern Festival, Labor Day, National Day and other holidays. The 20-minute long firework display is attended by 300,000 visitors on average. During the fireworks display, there will be an extra cruise ship scheduled for visitors to watch fireworks on a Xiangjiang River cruise ship. 83% of Orange Island visitors joined the Xiangjiang River Night Tour and it is rated as the third most popular attraction in Changsha by Dianping.

The Orange Island fireworks and the Xiangjiang River Cruise are also widely discussed on social media. As of October 2020, there were 11,000 videos on TikTok on topics related to Orange Island, with 140 million views. Among them, the Orange Island fireworks have been played 742,000 times. On National holidays in 2020, Orange Island received nearly 60,000 visitors in a single day, with the large majority being evening visitors.

Night-time Assets: Tokyo

Described as a city where tradition meets innovation, Tokyo is established as both a leading international destination and cultural hub. In both 2018 and 2019 Tokyo has ranked 7th in the Global Liveability Ranking produced by The Economist Intelligence Unit, and is renowned for its position as a world city, and a centre of business and the global economy. Despite being in possession of a great deal of cultural assets, Tokyo's night-time economy has been reported as being somewhat neglected until recently. Research produced by the Japan Tourism Agency in 2018 has indicated that both the level of satisfaction and number of foreign visitors who attended night-time attractions in Japan is lower than that of other international destinations. This has in part been attributed to the reduced evening and night-time offer of Tokyo's cultural and tourist attractions.

#7

Most Livable city
by The Economist
Intelligence Unit

The night-time economy has however come to be recognised as a key untapped resource, with significant discussions taking place as to how best the city can capitalise on its potential. In 2016 the Shibuya City Tourism Association appointed a Night Ambassador, hip hop artist Hideyuki Yokoi, also known as Zeebra, whose role is primarily to promote the nightlife and culture of the

Shibuya district, a popular area of the city where there are reported to be almost 12 venues per square kilometre. The Association also hopes to work with museums and other venues in the district to extend their opening hours and to create new late-night event programmes to further develop the night-time economy of the area. Such initiatives are not however confined to the Shibuya district, as demonstrated by the Nightlife Tourism Promotion Grant. The initiative, developed by the Tokyo Metropolitan Government and the Tokyo Tourism Foundation, looks to subsidise two thirds of the cost of new nightlife events, promotions and marketing, and local nightlife initiatives.



★ Example: Shinjuku Gyoen National Garden

To enable and encourage greater spending from tourists, the government and local authorities are looking towards initiatives centred around evening activities. A simple and effective method of achieving this has been a scheme that has lengthened the opening hours of public spaces, allowing events to take place at night and therefore capitalising on the city's existing. Over a five-day period, Shinjuku Gyoen National Garden, a popular visitor attraction whose typical hours run from 9am until 5.30pm, reopened for an evening cherry blossom viewing. In addition to the garden illumination, the event included live performances, food trucks and traditional demonstrations, including a Japanese tea ceremony. The reimagining of Shinjuku Gyeon National Garden after hours through incorporating these additional elements created a unique, desirable experience which proved popular with visitors. Over five days the event was attended by almost 9,000 people, 15% of which were reported to be international visitors. The events use of an otherwise empty space in conjunction with its popularity despite the short lead time led officials to consider how this and similar events could feature more regularly across the city.



Conclusion

In conclusion, the health of the night-time economy of World Cities requires careful attention on the part of city-leaders and cultural professionals. In our review of data and case studies we have found a rich variety of activities and actions which cities are undertaking to curate and maintain a successful night-time economy. We have also found an increasing convergence between cities on the leadership actions that they are taking to improve the cultural life of their city at night. It is clear that the night-time economy is not just a policy area that can manage itself, and certainly not one that should be seen as a problem, because when well managed it can deliver economically significant benefits as well as enhancing the reputation and attractiveness of the city.

There are also important lessons for cities around the world to learn from each other in their differences of approach. The development of the night-time economy was once part of establishing a city's reputation for competitiveness in the world economy, in order to attract talent, visitors and capital. Those factors are still important, but as cities grow and the definition of world city and global city matures, so too will the expectation of what makes a good night-time economy. In this respect there is a trend towards developing a reputation as liveable cities, with good work life balance and rich cultural experiences. Cities in Europe and North America are already adopting approaches from Asian cities, such as animating public spaces and enabling late-night content which puts the city on display. This is an approach which accepts that the night is not only for partying, but also to enjoy the culture and spectacle of city life. As such, a successful night-time economy strategy is part of a broader vision to create more humane and sustainable cities, places with a cultural offer that encourages a flourishing of the human spirit, just as much as they enable entertainment and revelry.