
Executive

24th July 2007

Report of the Assistant Director Economic Development and Partnerships

RESEARCH FINDINGS ON THE EVENING ECONOMY IN YORK

Summary

1. The report seeks to brief members on research on the evening economy and the experience of York city centre in the evening, undertaken in association with the First Stop York Product Development Group. Views are sought on the principles of the draft vision and action plan prior to a costed action plan being presented later in the year.

Background

2. The managed development of a healthy evening economy will bring social, economic and environmental benefits to the residents of York and has the potential to greatly increase the value that the city receives from tourism. Improving the visitor experience of York after dark will improve the city's ability to attract valuable overnight visitors. While only 16% of visitors to York stay overnight, they account for 58% of the impact of tourism on the local economy (£180 million pa). This implies that a focus on improving the evening experience of York will be very effective in boosting the evening economy and increasing tourism revenues overall. Conversely, this also means that this major revenue stream from overnight tourism would be significantly threatened by the incorrect development of the evening economy. In order to better inform future policy and action, an extensive study of the city centre evening economy with a particular focus on the relationship between tourism and the experience of the city centre after dark.
3. The research suggests that the correct "steer" for the York evening economy is towards a more inclusive evening experience with a more exciting and diverse range of evening activities, a higher amenity value and a higher perception of safety in the city centre. The research also highlights the need for co-ordination of activity in the evening economy to allow for greater communication and cooperation between the stakeholders involved including retail, hospitality, entertainment, accommodation and the local authority.
4. Key findings of the research, together with a draft vision and action plan to stimulate the evening economy in York are set out below. Consideration of this research and endorsement of the overall principles are requested prior to a more detailed, costed action plan .
5. Further research into the current behaviour and spending patterns of residents in the evening economy has been commissioned via the Council's Talk About Panel, the results will be available at the end of July.

Key Findings of Research

6. The main findings of the research undertaken in association with the First Stop York Product Development Group are set out below:

Trends in the development of the evening economy of UK cities?

- 6.1 According to “Night Vision” published in January 2007 by the Civic Trust (National) city centres have become dominated at night by alcohol related activity. *Appendix 1.1*
- 6.2 Many people - particularly older people and women - can feel excluded from town centres at night, particularly at the weekend. They fear anti-social behaviour and believe that there are few activities in town centres to attract them. Whilst about 45% of 16-34 year olds go out on the town one evening a week, only 15% of over 55s do and 71% of over 55s would not go to a town centre in the evening. *Appendix 1.1.*
- 6.3 Night Vision proposes encouraging diversity of activity as a means of developing the evening economy and improving the evening experience of town centres for everyone: families, residents, businesses, older people, teenagers etc. *Appendix 1.1*

What is the contribution of Tourism to the evening economy of York?

- 6.4 16% of visitors stay overnight in York (i.e. 600,000). *Appendix 1.4.*
- 6.5 The average length of stay in York is 3.28 nights and this has increased over recent years. *Appendix 1.4.*
- 6.6 In total there are 2 million visitor nights spent in York’s evening economy per year. *Appendix 1.4.*
- 6.7 Spend among visitors on (evening) food and drink and evening entertainment has risen significantly over the past 10 years (corrected for inflation) (per visitor per night on food and drink from £8 to £12/13, per visitor per night on evening entertainment from £1.72 to £4.67). *Appendix 1.4.*
- 6.8 Average spend per day by overnight visitors is approximately £77.97 including accommodation. *Appendix 1.4*
- 6.9 We can estimate that the total spend in York by overnight visitors is approximately £153 million¹ (and a total economic impact, including the multiplier effect, of £180 million). The total spend by overnight visitor in York’s evening economy is approximately £98 million² (total economic impact including the multiplier effect is approximately £115 million). *Appendix 1.4.*
- 6.10 Therefore, while only 16% of visitors stay overnight. Those overnight visitors account for 58% of the impact of tourism on the local economy. This implies that a focus on

¹ 600000 visitors x 3.28 average nights x £77.97 average spend by overnight visitors

² 600000 visitors x 3.28 average nights x £49.74 difference between average spend by overnight visitors and average spend by day visitors

improving the evening tourism product will be very effective in increasing tourism revenues overall.

- 6.11 Conversely, this major revenue stream from overnight tourism would be significantly threatened by the development of a less inclusive, less safe evening economy with a low amenity value.

How important is the evening experience of the city to the success of York as a destination?

- 6.12 In choosing a destination 52% of York's visitors state that a range of things to do in the evening is an important factor influencing their decision and this figure is rising steadily. *Appendix 1.4.*
- 6.13 Changing population trends will lead to an older age profile and may create a diversity of demand in the current evening economy market. *Appendix 1.1.*

What is the current visitor experience of York in the evening?

- 6.14 In comparison to other cities visitors feel that York is relaxed and safe in the evening. *Appendix 1.7.*
- 6.15 There has been a decrease in the percentage of visitors who think York is a dull place in the evening in recent years. *Appendix 1.4.*
- 6.16 Eating out, ghost walks, going to a pub or bar and walking are the most popular activities for visitors to York in an evening. *Appendix 1.4.*
- 6.17 The evening activities of visitors from social class A/B are more likely to involve going to a restaurant while the activities of visitors in social class D/E are more likely to involve going to a pub or bar. *Appendix 1.4.*
- 6.18 While changes to licensing has lead to longer drinking hours over the past few years. The same period has seen a decline in alternative (i.e.; alcohol independent) evening entertainment provision e.g. closure of the Barbican by CYC, closure of Odeon. *Appendices 1.1 & 1.2.*

How do resident's experience/ make use of the city centre in the evening?

- 6.19 There are high levels of regular usage of cafes, pubs, bars and restaurants by residents and such activities are perceived as one of the most important leisure activities. *Appendix 1.5.*

How could the visitor experience of York after dark be improved?

- 6.20 There was strong support from residents, visitors and evening economy stakeholders towards the development of a continental outdoor café culture in York in the evening *Appendix 1.7 & 1.8.*
- 6.21 Several research projects have revealed a strong demand among visitors for concerts/musical performances, outdoor theatres and cinema, street entertainment, street markets and evening festivals as possible evening activities. *Appendices 1.3, 1.4, 1.6, 1.7 & 1.8.*

- 6.22 A survey of Film Alfresco attendees (visitors and residents) revealed that 60% felt there was not enough to do in York in the evening. *Appendix 1.6.*
- 6.23 50% of Film Alfresco attendees said they would attend an Open Air Cinema every month, 25% stated that they would attend twice a month and a further 9% would come weekly. *Appendix 1.6.*

Visitor Attractions

- 6.24 Visitor attractions all close at between 5-6. *Appendices 1.2 & 1.7.*
- 6.25 Focus group research (among both residents and visitors) indicated a strong demand for later (i.e. early evening) opening of historic attractions *Appendix 1.7.*
- 6.26 Research based on trial late night openings of historic attractions suggests that 56% of visitors would be interested in visiting museums and attractions in the evening. *Appendix 1.3 .*

Evening Shopping

- 6.27 Currently there is no co-ordinated (or marketable) late night shopping in the city centre. *Appendix 1.2.*
- 6.28 40% of respondents to the Film Alfresco Questionnaire (residents and visitors) stated that evening shopping would encourage them into the city centre on an evening. *Appendix 1.6.*
- 6.29 35% of visitor spend is spent on shopping. This is the most valuable aspect, in terms of spend, of the visitor experience. It is therefore reasonable to deduce that the city is losing out on potential revenue from tourists as well as residents by not developing a regular co-ordinated evening shopping experience that can be marketed to prospective visitors. *Appendix 1.4.*

Lighting

- 6.30 Focus group research indicated strong demand for outdoor active recreation in the evening. Walking was highlighted as an important aspect of an evening's activities and entertainment. Visitors suggested that improved lighting could be used to make more of the city walls and waterfront as opportunities for evening walks. *Appendix 1.7.*
- 6.31 Surveys throughout the UK have shown that investment in lighting leads to a reduction in crime levels and a greater perception of safety in the city centre after dark. *Appendix 1.9 .*
- 6.32 York has recently seen significant investment in both permanent architectural lighting and temporary creative lighting aimed at improving the experience of the city centre after dark. This investment has been recognised as an example of how to improve the after dark experience of a city centre in a sustainable and inclusive manner. *Appendix 1.1.*
- 6.33 There has been a very positive reaction to improved city centre lighting schemes among visitors (82% of people who've seen the lighting see this as

attractive/beautiful, or as adding to the city's atmosphere). *Appendix 1.4*. 60% of residents surveyed had attended the illumination and light shows. *Appendix 1.5*.

Which time periods are most in need of improvement

5-7pm

- 6.34 Visitors and residents feel that York has plenty on offer during the day however there is a severe lull in the 5-7pm early evening period when the city seems to close down very early. *Appendix 1.7*.
- 6.35 The end of pedestrianisation at 4 pm coincides with the arrival of many vans in the city centre and gives the perception that the city is closing down very early. *Appendices 1.7 & 1.8*.
- 6.36 Evening economy stakeholders felt that extending retail opening by an hour would be a significant boost to York's evening economy by making the city centre useful to people who have just finished work in the city and thereby retaining them in the city centre. *Appendix 1.8*.
- 6.37 Extended opening hours of cafes was suggested by visitors, residents and stakeholders as a way to fill the early evening slot. *Appendices 1.7 & 1.8*.

7-9pm

- 6.38 In a survey of Film Alfresco attendees 90% of respondents, when asked what time they would prefer city centre evening entertainment to take place, picked the 7-9pm period. *Appendix 1.6*.

Barriers to development of the evening economy

Transport and Parking

- 6.39 Discussions with evening economy stakeholders revealed a lot of anger about the introduction of evening parking charges in the city centre. Traders believe that the introduction of evening car parking charges has hurt evening businesses. *Appendix 1.8*.
- 6.40 According to focus group research with visitors and residents and discussions with stakeholders the early closing times of the Park and Ride sites make it more difficult to come into town in the evening (and therefore restrict the development of the evening economy). In general the last bus from the city centre is around 8.00pm with the gates of the car park locked after the last bus. *Appendices 1.2, 1.7 & 1.8*.
- 6.41 Buses services are far less frequent in the evenings (after 7.00 especially)

Deterrents to using York in the evening

- 6.42 York in the evening is perceived by visitors as not very accommodating to children. *Appendix 1.7*.
- 6.43 Most evening economy stakeholders who attended discussion groups expressed the belief that rowdy and anti-social behaviour (and specifically stag and hen parties) are

a serious threat to the visitor experience of the city after dark and to the development of the evening economy. *Appendix 1.8.*

- 6.44 According to the Safer York Partnership “the community in York has a much greater fear of crime at night time than during the day. A street survey carried out by Safer York Partnership last summer [2004] showed that the reason for this increase in fear is a perception that York is too quiet at night and does little to encourage families to come into the city during the evening”. *Appendix 1.9.*
- 6.45 Some visitors feel the policy, among hotels in York, of not accepting one night bookings is a deterrent to staying overnight in York. *Appendix 1.7.*

Provision of Information about the Evening Economy

- 6.46 According to visitors the current provision of information regarding evening events (i.e. performances etc) and restaurants is poor. *Appendix 1.7.*
- 6.47 Some hoteliers felt that the current provision of information about the evening economy was difficult to find, not always up-to-date and inaccurate which means they are often not in a position to inform their visitors of the current offer. *Appendix 1.8.*

Draft Proposed Vision and Action Plan

- 7.1 Following discussions with the First Stop York Product Development Group, a draft proposed vision and action plan has been prepared. View of the Board are welcomed on this, prior to any formal consideration of this by City of York Council and other partners.

Inspiration for the development of York’s evening economy is available from the many historic cities on the continent where the streets at night are thriving and occupied by people young and old working, socialising, exercising and engaging in entertainment, cultural and community activities. The Civic Trust for Britain has recently proposed the following vision for the Evening Economy in UK cities.

“The Civic Trust has a very clear vision for what town centres should be at night, in short we would like to create “town centres for all” - welcoming spaces that work at night for everyone: families, residents, businesses, older people, teenagers etc.

We want to see a reduction in:

- *Crime*
- *Noise and disturbance*
- *Street fouling*
- *Drink and drug related A+E admissions*

We want to see:

- *Shops open in the evening*
- *Venues that cater for families and older customers*
- *More special events and festivals that add life to the town centre*
- *Innovative use of public buildings in the evening*
- *An increase in non alcohol related activities at night*
- *An improvement in public spaces and lighting*

- *Better night time public transport*
- *An increase in a responsible, adult presence such as street wardens.”*

Proposed Action Plan

The following action plan, based on the key research findings, recommends a series of measures to improve the experience of York in the evening and by doing so improve the evening economy and increase the number of visitors.

Coordination and communication

- 7.2 Establish an Evening Economy Forum which will facilitate communication and co-ordination between the evening economy stakeholder groups e.g. venues, retail, visitor attractions, markets, restaurants, highway authority, the destination marketing organisation and the tourism partnership. This forum could facilitate the integration of retail opening hours, entertainment and opening hours of museums and attractions. The forum would be facilitated by the CYC Economic Development Unit initially then passed onto the York Tourism Partnership or BID company (if established), with a private sector chair.
- 7.3 A CYC officer needs to be given specific responsibility to ensure that the coordination above takes place.

Improve the provision of non-alcohol dependant evening activities and entertainment.

To get a more diverse set of evening economy users, improve the perception of safety and make the evening economy more inclusive and family friendly by:

- 7.4 Improve the amenity value of the city centre and provide for active recreation e.g. walking, strolling, jogging in the evening in the city centre. Recommend development of a high quality riverside walking, jogging, cycling route along both banks from Clifton Bridge to Millennium Bridge through greatly improved lighting, surfacing, signage. Other possibilities include specific improvements to allow the walls to be opened at night e.g. Chester
- 7.5 Develop a permanent high quality, specifically designed outdoor events space in the city centre, which would be well-lit, have seating and would be used:
- as the fixed site for street entertainment which would take place every early evening at a fixed time.
 - as the place to find information about what's going on in the city centre that night via information boards and/or display screens.
 - potentially the events space would located alongside the VIC (see information section below).

Facilitate the development of a continental ambience

- 7.6 Simplify the licencing arrangements for bars, cafes and restaurants wishing to provide outdoor seating i.e. there should be a single licence rather than 2 or 3.

- 7.7 Remove the “Café Curfew”, Cafés, bars and Restaurants should be allowed, where possible, to serve breakfast before 10 and evening meals and drinks after 8pm.
- 7.8 There will soon be a need for defined outdoor smoking areas – developing continental style outdoor seating is an opportunity to make sure this happens in a co-ordinated and attractive way.
- 7.9 Benefits in terms of responsible drinking and improved levels of informal surveillance and perceptions of safety on the street.

Develop better Evening Events and Festivals

- 7.10 Focus public support for events and festivals on those which improve the evening experience of the city.
- 7.11 Develop one major, large scale event which will showcase York as an overnight destination.
- 7.12 To facilitate the marketing of evening events and festivals, all public support should focus on events which will run for a minimum of 3 years i.e.; no one off events.
- 7.13 Improved listings website (as below)

Encourage Evening Shopping

- 7.14 CYC to allow free evening parking on a specific night (weekly) to facilitate co-ordinated, regular and marketable late opening/ evening shopping.
- 7.15 CYC should only give this concession on the basis of an commitment from sufficient retailers in advance to open on that agreed night for an agreed number of months in order to trial the initiative correctly.

Improving the 5-7pm period (tumbleweed time)

Keep people in town by

- 7.16 extending pedestrianisation hours and retail opening hours,
- 7.17 facilitating early evening street entertainment (as above)
- 7.18 extended opening times of attractions
- 7.19 allowing outdoor seating to facilitate the early evening café culture.
- 7.20 The reduced evening car parking charge (i.e.; currently £2 for the night) should start at 5pm rather than 6pm every weekday in order to encourage more activity in the city centre between 5 and 7pm.

Improving the 7-9pm period

- 7.21 Attract more people into the evening economy by facilitating more events and cultural activities e.g. more music concerts etc. There is a need for more performance venues in the city centre.

- 7.22 Extend opening times at all park and ride sites until 10pm at least or potentially later for theatre, cinema and concert goers and also work with First Bus on ensuring the best possible mid-evening service bus timetables.
- 7.23 Improve information provision about evening events and activities. (see below).

Improved information provision re evening entertainment

- 7.24 Central city centre events & information point (as described above)
- 7.25 Having within the daytime VIC a dedicated evening desk and information point which could also function as a booking service for evening events.
- 7.26 Sustained minor investment in a proper listings website (to replace www.whatsonyork.com) which would be more searchable and could be used to distribute weekly e-mail bulletins to accommodation providers. It may be that this website would be operated by a private sector company with some support from the Tourism Partnership and/or CYC.
- 7.27 The use of the Evening Economy Forum (proposed above) to encourage an “Evening economy ambassador” in each hotel (as in the Queens Hotel Appendix 8)

Policy

- 7.28 Both the City of York Council and the York Area Tourism Partnership should adopt the policy of developing and promoting a vibrant, diverse and inclusive evening economy, as described in Appendix 1, which would bring benefits both to residents and visitors.
- 7.29 There is a need for consideration of the evening economy in all relevant CYC strategies and plans.
- 7.30 Development and adoption, across CYC including planning, licensing and network management and the York Area Tourism Partnership, of an evening economy strategy which will outline co-ordinated actions on a number of issues including, for example, development of evening shopping, management of stag and hen parties, licencing etc

Consultation

8. The report is being provided for information and there are no recommendations with financial consequences at this stage. There has been consultation with a range of industry stakeholders and with the Economic Development Partnership Board on 19 June. The Board resolved to support in principle the development of a vibrant, diverse and inclusive evening economy in York, and asked that a further report be presented on a costed action plan to support the development of the evening economy.

Options

9. Members can choose to endorse the recommendations in this report to develop a strategy for the development of a more inclusive evening economy with a more exciting and diverse range of evening activities, a high amenity value and a high perception of safety. We feel that this will bring social, economic and environmental

benefits to the residents of York and has the potential to greatly increase the value that the city receives from tourism.

10. Alternatively Members could choose not to endorse the recommendations. We feel that a major revenue stream from overnight tourism would be significantly threatened by the unplanned and incorrect development of the evening economy.

Analysis

10. As stated in the paragraph above, options have not been presented therefore there is no need for appraisals.

Corporate Priorities

11. The research on the evening economy relates to the following objectives for the Council, including the Community Plan, Corporate Strategy 2006-09 and the Economic Development Service Plan

Community Plan

- * The “Thriving City” theme of the WOW Community Plan has the following strategic objective:

“To support the progress and success of York’s existing businesses and to encourage new enterprises in order to maintain a prosperous and flourishing economy that will sustain high employment rates.”

Reason: An extended evening economy will allow existing businesses to flourish (with the potential for much higher custom and income generation) and could allow new enterprise to grow to take account of new market opportunities.

Corporate Strategy

- * The Corporate Strategy 2006-09 sets identifies two corporate priorities relevant to this report:

- The Safer City - Reduce the actual and perceived impact of violent, aggressive and nuisance behaviour on people in York

Reason: A changed evening environment in the city, offering more non-alcohol based alternatives, will change the ambience of the city centre and make for a safer atmosphere

- Improving our organisational effectiveness - Improve the way the Council and its partners work together to deliver better services for the people who live in York.

Reason: The Council and partners will seek, in the costed action plan, to identify activities where with better co-ordination it will be possible to encourage a more inclusive evening experience with a more exciting and diverse range of evening activities for residents as well as visitors to enjoy, thereby creating a more successful evening economy for the city, more job opportunities for local residents etc

Economic Development Service Plan

- * The Economic Development Service Plan sets identifies a number of corporate priorities:
 - DIP 5 Increase people's skills and knowledge to improve future employment prospects.
 - DIP12 Improve the way the Council and its partners work together to deliver better services for the people who live in York.

Implications

12. As this is a general report seeking views on the evening economy prior to any formal consideration of a costed action plan, there are no implications. Proposals set out in the vision and draft action plan are presented with no firm commitment or financial support from the City of York Council. If the Executive agrees to endorse this report, a fully costed action plan will be developed and any implications will be outlined.

Risk Management

13. In compliance with the council's risk management strategy, there are no risks associated with the recommendations of this report as at this stage it is purely asking for Members' views

Recommendation

Executive are requested to:

14. Provide their input and views on the key finding of research, and the principles outlined in the draft proposed vision and action plan for the evening economy in York are requested.
15. Agree to support in principle the development of a vibrant, diverse and inclusive evening economy in York
16. A further report is presented on a costed action plan to support the development of the evening economy in York city centre.

Reason: To help shape the effectiveness of future action.

Contact Details

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**Report
Approved**

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Tourism Development
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554550/554425
Specialist Implications Officers - none

Wards Affected:

All

For further information please contact the author of the report

Background Papers:

All background papers for the Evening Economy report report, including comments from the workshop session etc are held at 20 George Hudson Street