

# London at Night: An Updated Evidence Base for a 24 Hour City

March 2024



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## Executive summary

### Introduction

London is a global city with an extensive 24-hour economy. Most parts of London's near-£520 billion economy are active around the clock and night time and late night activity are prevalent in a range of industries. A quarter of London's workforce (1.3 million people) regularly work between 6pm and 6am, London has over five times as many 24-hour licensed premises than any other city in the UK and an extensive 24/7 public transport network. However, the breadth of activity in the capital after dark is hidden from many and remains poorly understood and often overlooked.

The Mayor of London Sadiq Khan, and the Night Czar Amy Lamé, have committed to improving how London is planned at night. To that end they have endorsed the improvement of data collection, analysis and research about London's people, places and economy at night. In 2018, the GLA published *London at Night: An Evidence Base for a 24 Hour City*. It revealed important new insights including the breadth and scale of London's night-time workforce.

In his London Plan, the Mayor has called on all boroughs to create evidence-led night-time strategies. A third of London boroughs are now doing so, and the London Borough of Wandsworth recently became the first to publish their night-time strategy.

This March 2024 Update to the evidence base reveals the latest headline findings and shows how activity across London has changed since its first publication. We have organised the findings as follows:

- [Chapter 1: Working At Night](#)
- [Chapter 2: The Economy at Night](#)
- [Chapter 3: Out-and-about in London at Night](#)
- [Chapter 4: Late Night Travel](#)

Data sources and definitions of key terms can be found within each chapter. In addition, all the data used in this report is published in an accompanying file on the London Datastore.

*This work contains statistical data from ONS which is Crown Copyright. The use of the ONS statistical data in this work does not imply the endorsement of the ONS in relation to the interpretation or analysis of the statistical data. This work uses research datasets which may not exactly reproduce National Statistics aggregates.*

## Summary of findings

1. **Over 2 million visitors are out-and-about in London on a typical night between 9pm and midnight.** Around 1 million are out even later, between midnight and 3pm. The early evening (6pm-9pm) typically sees 3-4 million visitors.
2. **The number of London business sites in the Night-time Industries rose by 11.3% between 2017 and 2023 to 135,700.** This includes 110,000 micro businesses, 21,000 small businesses, around 4,000 medium businesses and around 800 businesses with 250 or more employees.
3. **Growth trends in the number of businesses in the Night Time Industries have been similar in London, Greater Manchester Combined Authority (the most comparable city region in the UK) and England as a whole.** (See Figure 1).
4. **The number of employee jobs in London's Night Time Industries has grown by 151,000 since 2017 (up 8.9%),** with the Cultural & Leisure grouping of Night Time Industries seeing the fastest growth (up 19.8%). This growth has been spread out across London.
5. **London's hospitality sector recovered much faster and stronger from the pandemic than previously thought.** Jobs in the sector rebounded to their December 2019 level a full year earlier than the June 2023 date previously published. By September this year there were 111,000 more jobs (24%) than pre-pandemic.
6. **The number of pubs in London stopped declining around 2015 following 15 years of a high level of closures.** The latest Office for National Statistics data from 2022<sup>1</sup> showed London pub numbers had stabilised at around 3,500 and **the first increase in the number of smaller pubs since 2002.** While London's pub numbers reflected an overall UK trend, **the number of employees increased by more in London (12%)** than the UK (3%).
7. **Home Office data shows that London's licenced premises numbers have risen strongly over the last decade,** and generally out-grown comparable areas such as Greater Manchester and West Midlands Combined Authorities.
8. **London had around 36,000 licensed premises in 2021/22, an increase of around 5,000 (or 17%) on 2011/22. London's growth rate was higher than both Greater Manchester Combined Authority (GMCA) and West Midlands Combined Authority (WMCA).** GMCA had around 9,000 licences (up 2%) and WMCA had 8,900 premises licences (up 5%) in 2021/22.
9. **The number of premises with a 24-hour alcohol licence in Greater London increased by around 65%** from around 1,200 in 2011/12 to around 1,900 in 2021/22. GMCA had 235 24-hour premises (up 39%) and WMCA had 367 (up 54%) in 2021/22.

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<sup>1</sup> The GLA Pubs Audit is based on ad-hoc data released by the Office for National Statistics. As of publication, we have not yet received 2023 data.



10. **The number of late night refreshment licences** (anywhere selling hot food or drinks after 11pm e.g. cafes, restaurants and takeaways) has seen a 4% fall in London and the West Midlands, whilst Greater Manchester has seen a 14% fall.
11. **The West End is by far the busiest destination from 6pm to midnight**, with more than 140,000 visitors on a typical Thursday to Saturday night.
12. **London's top 20 hotspots for night-time activity are spread across 16 London boroughs, and nine hotspots are outside the Central Activities Zone.** (See Figure 2.)
13. **Some boroughs have a night time offer that is more important when compared to their day-time offer than in other boroughs. Hackney, Tower Hamlets, Islington and Lambeth** typically have visitor numbers from 6pm to midnight on Thursdays to Saturdays that are just 24% to 32% lower than on a Saturday afternoon (for comparison, many boroughs are 50% or more down).
14. **Comparing three-hour time slots, Hackney is busier at night than during the day on Saturdays, with 4% more footfall from 9pm to midnight compared to the afternoon**, while Tower Hamlets comes close behind.
15. **MasterCard spend data, available from the GLA High Streets Data Service, shows that 1 in every 4 pounds is spent at night.** This is the proportion of in-store town centre retail spending that happens between 6pm and 6am. **Hackney is the London boroughs with the highest share of night-time in-store spend at 36%** of the total spend in the borough's high streets.
16. **Night-time spend typically peaks on a Friday evening in London as a whole.** However, the spend peaks on Thursday evenings in the Central Activities Zone. Saturday nights see the most spend after midnight.
17. **The Mayor's Night Time Enterprise Zones programme<sup>2</sup> showed the potential to more than double high street footfall after 6pm** with events and later opening hours. Local spend increased by up to 70% when events were on and over 69% of people surveyed said they felt safer.
18. **London had 16% of the UK's night workers in 2023.** Greater Manchester and the West Midlands were the next largest city regions for night working, having 4.1% and 3.7% respectively of the UK total.<sup>3</sup>
19. **The number of night workers in the UK has been falling and this is mirrored in London which had 1.32 million night workers in 2023, down from 1.60 million in 2017.** Night workers now make up 25% of London's workforce. (See Figure 3 and Figure 4).
20. **Four in five (80%) workers in Night Time Industries now receive at least the London Living Wage.** The number of workers in night-time industries earning below the London Living Wage (LLW) fell from 378,000 in 2015 to 257,000 in 2022.

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<sup>2</sup> See [https://www.london.gov.uk/sites/default/files/2024-02/240228\\_NTEZ-Full-Report.pdf](https://www.london.gov.uk/sites/default/files/2024-02/240228_NTEZ-Full-Report.pdf)

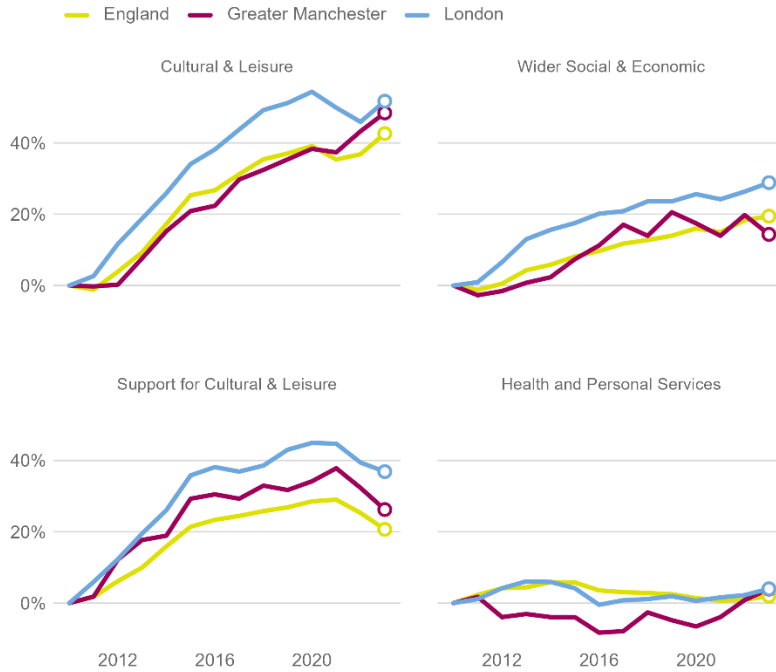
<sup>3</sup> See Office for National Statistics, [Night-time Economy in the UK](#) (2022).

**However, workers in most night-time industries remain more likely on average to be paid below the LLW than those in other industries.** For example, 39% of workers in the night-time cultural and leisure sector were still paid below the LLW in 2022, although the trend has improved from 56% in 2015.

21. **The industries with the highest number of night workers in London in 2023 were Professional services, Health and Transport & storage.** These three sectors accounted for more than 40% (560,000) of London's night workers.
22. Night working is more likely to happen in some industries. **Night workers made up the biggest share of the workforce in Transport and storage (55%) and Arts & recreation (55%).**
23. **Over a third of young workers work nights:** 34% of workers aged 16-20 were night workers in 2023, while the share was 38% for those aged 21-25.
24. **Around 1 in 3 Londoners travel late at night at least once a month.** Just over half (53%) of those travelling at night are predominantly travelling for leisure purposes, around 22% to visit friends and family, and 19% to work.
25. **Night workers combine different modes of transport to travel to and from work.** London Buses (45%), London Underground (35%) and private car (25%) are the most common modes used by night workers.
26. **People travelling for leisure or visiting friends and family late at night most commonly use London Underground (62%) and London buses (54%).**
27. **Women are less likely to travel late at night, with 37% never doing so, compared to 30% of men.**
28. **Young people are much more likely to travel late at night,** with 30% of 18-24 year-olds travelling at least once a week, compared to 24% of 25-49 year-olds and 13% of 50-64 year olds and those 65 or older.

## Figures and tables (Executive summary)

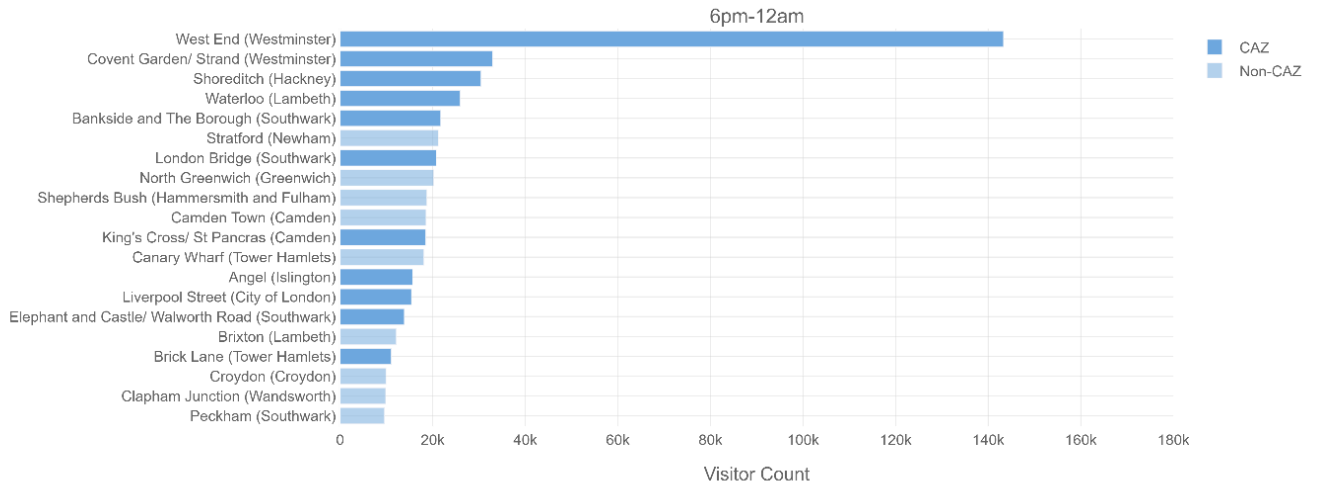
**Figure 1: Cumulative growth of small, medium and large businesses in the Night-time Industries, London, Greater Manchester and England, 2010-2023**



Source: *Business Counts 2010-2023, ONS.*

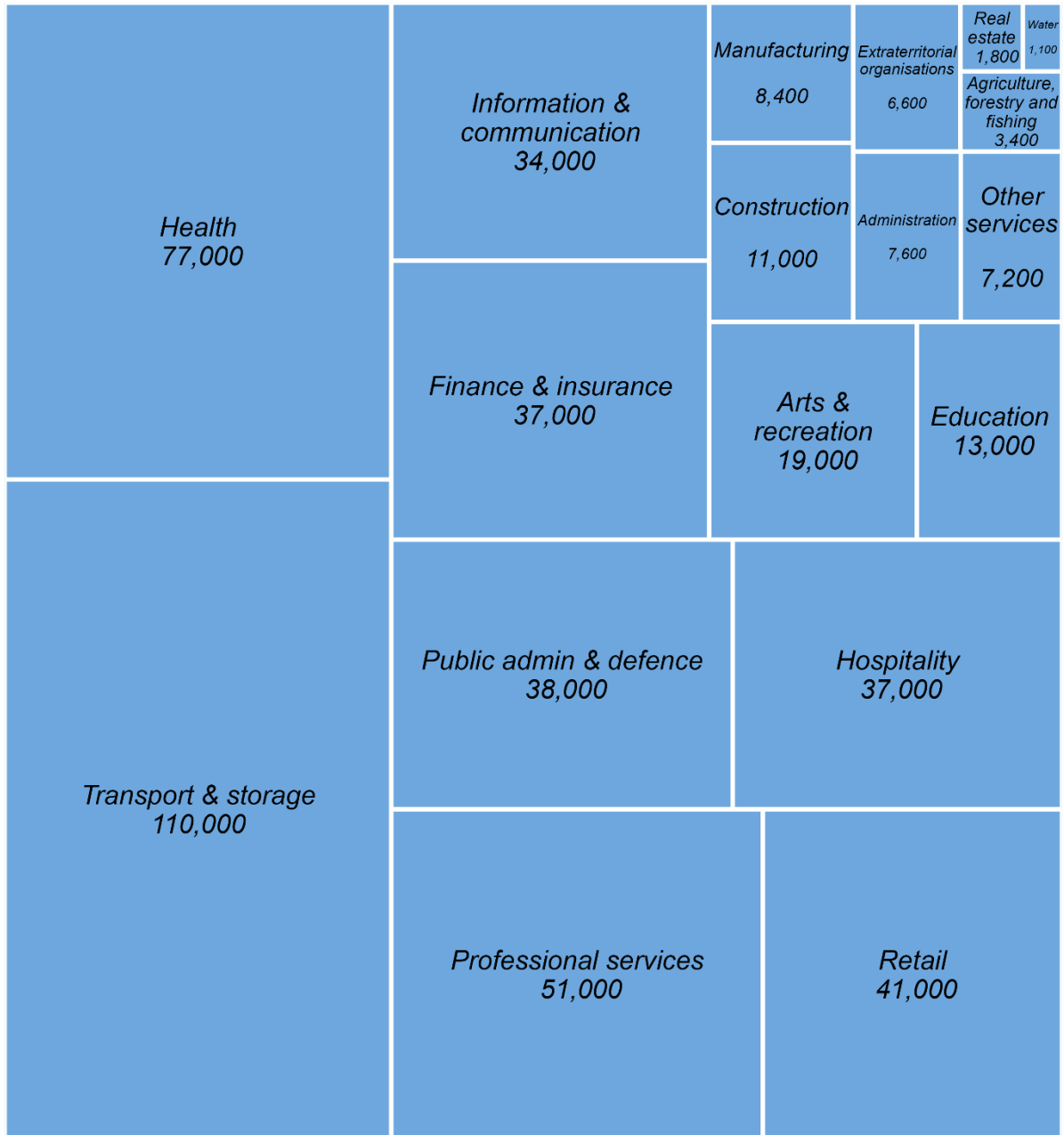


**Figure 2:** Night-time visitor hotspots across London, Thursday to Saturday, 6pm-12am



Source: BT Mobility footfall 2023, GLA City data analysis.

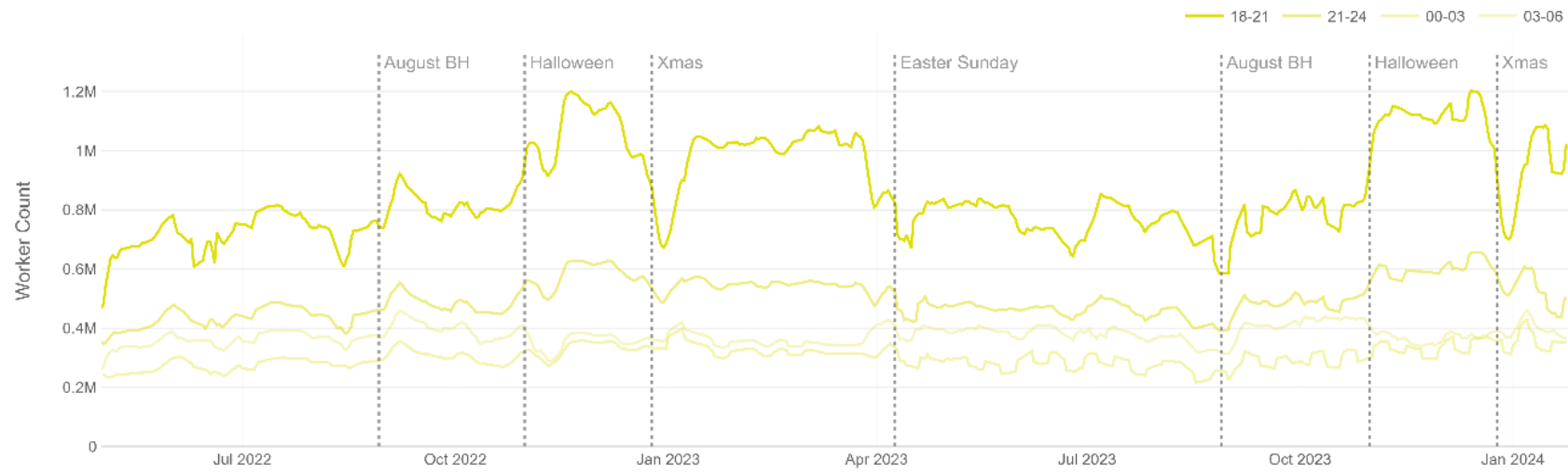
**Figure 3: Late-night workers by industry in London, 2023**



Source: Labour Force Survey 2023, UK Data Service.

Notes: Based on place of work. Figures may not sum to accurate totals due to rounding.

Figure 4: Night-time Workers in London, 2022-2024



Source: BT Mobility footfall 2022-2024, GLA High Streets Data Service analysis.

# 1. Working At Night

## Introduction

This chapter reveals headline findings about London’s night-time workforce (first published in December 2023) and adds evidence from novel BT Mobility footfall data to supplement official survey data to show where and what times people work at night in London.

These headline findings can be summarised as follows:

- People of all ages, backgrounds and skill levels work at night, but young people and those in low skilled occupations tend to do so more than other groups;
- Night work plays a big part in the economies of outer London boroughs;
- There have been notable changes in the scale and prevalence of night working across different industries; and
- Inequalities in pay and conditions are often worse for night workers compared to daytime-only workers.

## Data and Definitions

1. **Night workers** are those who work at any time between 6pm and 6am. Their work hours can be divided into two periods:
  - **Evenings** (6pm-12pm).
  - **Late nights** (12pm-6am).
  - Those who never work nights are **daytime-only** workers.
  - We refer to **night workers** as those who “usually” work evenings and/or late nights, even if they also “usually” work during the day. This is because many people work both day and night as part of their usual shift patterns.
  - We use **late night workers** for those who work late nights even if they also “usually” work evenings and/or days.
2. People work at night in many activities, but some industries and occupations are more likely to involve night work than others — we call these **night-time industries** and **night-time occupations**. In 2018, The London Night-Time Commission’s Data and Research Group designed a Night-Time classification which we use in this report (see Figure 5.). It includes a wide range of industries and occupations that have a higher-than-average proportion of night-workers.<sup>4</sup> We refer to people working in these industries as **workers in night-time industries**,<sup>5</sup> and provide a more in-depth look at the NTIs in London’s 24 Hour Economy.
3. **BT Mobility data** from the GLA High Streets Data Service classifies people by their usual activities and movements around the city, into residents, workers and visitors. Workers are those who regularly spend time away from home in a particular location. As such, it might not include those with no fixed work address.

<sup>4</sup> It is based on UK Standard Industrial Classification (SIC) sectors and Standard Occupational Classification (SOC) jobs.

<sup>5</sup> Note that some workers in night-time industries might not be night workers, and vice versa.

## Key findings

1. **The number of workers in night-time industries earning below the London Living Wage (LLW) fell from 378,000 in 2015 to 257,000 in 2022.**<sup>6</sup> However, workers in night-time industries (other than 24-hour health and personal services) remain more likely on average to be paid below the LLW than those in other industries. In 2022, some 20% of workers in night-time industries were paid below the LLW, compared to 11% of those in day-time industries. Some 39% of workers in the night-time cultural and leisure sector (including workers in hospitality, private security firms and creative, arts and entertainment sectors) were still paid below the LLW in 2022, although the trend has improved from 56% in 2015. (See Figure 6)
2. **The number of night workers in the UK has been falling and this trend is mirrored in London.**<sup>7</sup> In the UK there were 8.4 million night-workers in 2023, down from 9.5 million in 2016.
3. **London now has 1.32 million night workers, down from 1.60 million in 2017.** Night workers now make up 25% of London's workforce, down from 30% in 2017. This fall in the share has occurred due to both a 278,000-person fall in the night-time labour force and a 297,000-person rise in the day-time labour force. (See Figure 7.)
4. **London had 16% of the UK's night workers in 2023.** Greater Manchester and the West Midlands were the next largest city regions for night working, having 4.1% and 3.7% respectively of the UK total.<sup>8</sup> However, London's 25% rate of night-working in 2023 was just below the rest-of-UK average of 26%.
5. **Night work can have negative impacts on health and sleep.** The Liminal Space interviewed 801 people working nights in London, asking them about the impact of their work on their sleep and general health. Out of more than 250 respondents, around one fifth (22%) said their quality of sleep was poor or very poor when working shifts. Half the respondents said their sleep quality varied between good and poor. In addition, almost three-fifths of respondents said they slept less than six hours when working shifts. Only 14% said they slept at least seven hours.
6. **The industries with the highest number of night workers in London in 2023 were Professional services, Health and Transport & storage.** These three sectors accounted for more than 40%, or 560,000, of London's night workers. (See Table 1 and Figure 8, Figure 9 and Figure 10.)
7. **Night workers made up the biggest share of the workforce in the Transport and storage (55%) and the Arts & recreation (55%) sectors.** Hospitality also had a large share of night-workers (48%) however it lost nearly half its night-time workforce since 2017 when 151,000 worked at night.
8. **Among London's night workers, the number working any *late* nights has fallen from 615,000 in 2015 to 507,000 in 2023.** The industry with the highest number of

<sup>6</sup> Annual Survey of Hours and Earnings 2015-2022, Secure Research Service

<sup>7</sup> Figures relating to night workers in this section are drawn from GLA Economics analysis of the Labour Force Survey 2015-2023, UK Data Service.

<sup>8</sup> See Office for National Statistics, [Night-time Economy in the UK](#) (2022).

late-night workers in 2023 was Transport & storage with 106,000. It was also the industry with the highest share of late night-workers (39%). Health (77,000 workers, 13%) and Hospitality (37,000 workers, 23%) are also notable large employers of late-night workers. (See Figure 11.)

9. **Of London's 1.32 million night workers, 544,000 live in Inner London, 581,000 live in Outer London and 222,000 live outside London.** However, more work in Inner London (791,000) than in Outer London (528,000). Around 28,000 Londoners work at night outside the city (See Figure 12).
10. **Commuting flows data suggests that night workers live and work in the same zones,** with 503,000 living and working in Inner London and 389,000 living and working in Outer London. Some 164,000 travel to Inner London from Outer London, and 41,000 travel to Outer from Inner.
11. **Headline BT footfall data on night workers broadly aligns with the ONS data reported above.** It shows, for instance that, depending on the time of year, around 800,000 to 1.2 million people are at their place of work from 6pm to 9pm, while around 400,000 to 600,000 are at work from 9pm to midnight and 200,000 to 400,000 from midnight to 6am. (See Figure 13.)
12. **There has been little change in the number of night workers appearing in the BT Mobility data over the period since April 2022.** The numbers working 6pm-9pm tend to peak in the key shopping period from Halloween to Christmas and fall in the late spring to late summer months. The numbers working later at night show less seasonal variability.
13. **Westminster has the highest share of London's night workers (6.8%) but large concentrations are also found in outer London boroughs such as Hillingdon (4.8%), Bromley (4.3%) and Barnet (4.3%).** Considering individual boroughs, we find that in Outer London, working at night is more likely than in Inner London. Redbridge (35%), Havering (34%) and Harrow (34%) have the highest shares of night workers to daytime workers. (See Figure 14).
14. **The number of night workers is roughly similar on weekdays and weekends** (see Figure 15). For the 6pm to 9pm period, the number of workers gradually increases during the week, reaching its peak on Thursday nights and then declines until Sunday night. Late night (after midnight) work tends to peak on Fridays. (See Figure 16).
15. **A higher proportion of night workers are found outside the Central Activities Zone (CAZ),** with the peak there occurring on Fridays. The peak numbers of workers within the CAZ is on Thursdays. (See Figure 17.)
16. **Compared to night workers in the CAZ, workers outside the CAZ were more likely to work after midnight** (See Figure 18.)
17. **Night work encompasses a very wide range of job types and at all skill levels.** Almost half of all night workers aged 26-60 were in high skill (level 4) occupations. Low-skilled workers (level 1) make up a small share of the London's overall workforce (around 10%) and these workers are disproportionately likely to work late nights, with over 15% doing so, compared to 12% at level 2, 10% at level 3 and 7% at level 4.



18. **The occupations with the highest shares of night work in 2023** were Protective services in the Associate professional category (which includes junior ranks in the police, fire and prison services) with 63%; the Leisure and travel services category in Caring and Leisure (which includes rail and air travel assistants) with 62%; and Process, plant and machine operatives (with 62%).
19. **Younger workers are more likely to work evenings and nights in London.** 34% of workers aged 16-20 were night workers in 2023, while the share was 38% for those aged 21-25.
20. **Of London's 1.32 million night workers in 2023, 796,000 were men (60%) and 525,000 were women (40%).** These ratios were roughly in line with workforce shares, though with a slightly higher share of night workers among male workers.
21. **Night workers are more likely to have been born overseas than day workers.** There was a slightly lower share of night workers among those born in the UK relative to those born outside the country. While 24% of UK-born workers work evenings and nights, the share was 28% for those born in the EU and 26% for those born in the rest of the world.
22. **One in three night-workers (421,000 people) in London in 2023 were from the Black and minority ethnic population.** The share of night workers among BAME workers in London has typically been higher than that for white workers over the years since 2015, averaging 33% and 27% respectively from 2015-2022. However, in 2023 the likelihood of BAME workers doing nights fell steeply, from 32% in 2022 to 24%. Further data is required to understand the reasons for the drop. (See Figure 19.)
23. **If you are a person with disabilities, you are also more likely to work at night.** The share of night workers among those with an **Equality Act disability** is 29%, which is higher than the 25% share among workers without a disability.
24. **If you are self-employed, you are much more likely to work at night.** Over one-third (37%) of London's self-employed workers work at night.

## Figures and Tables for Working at Night

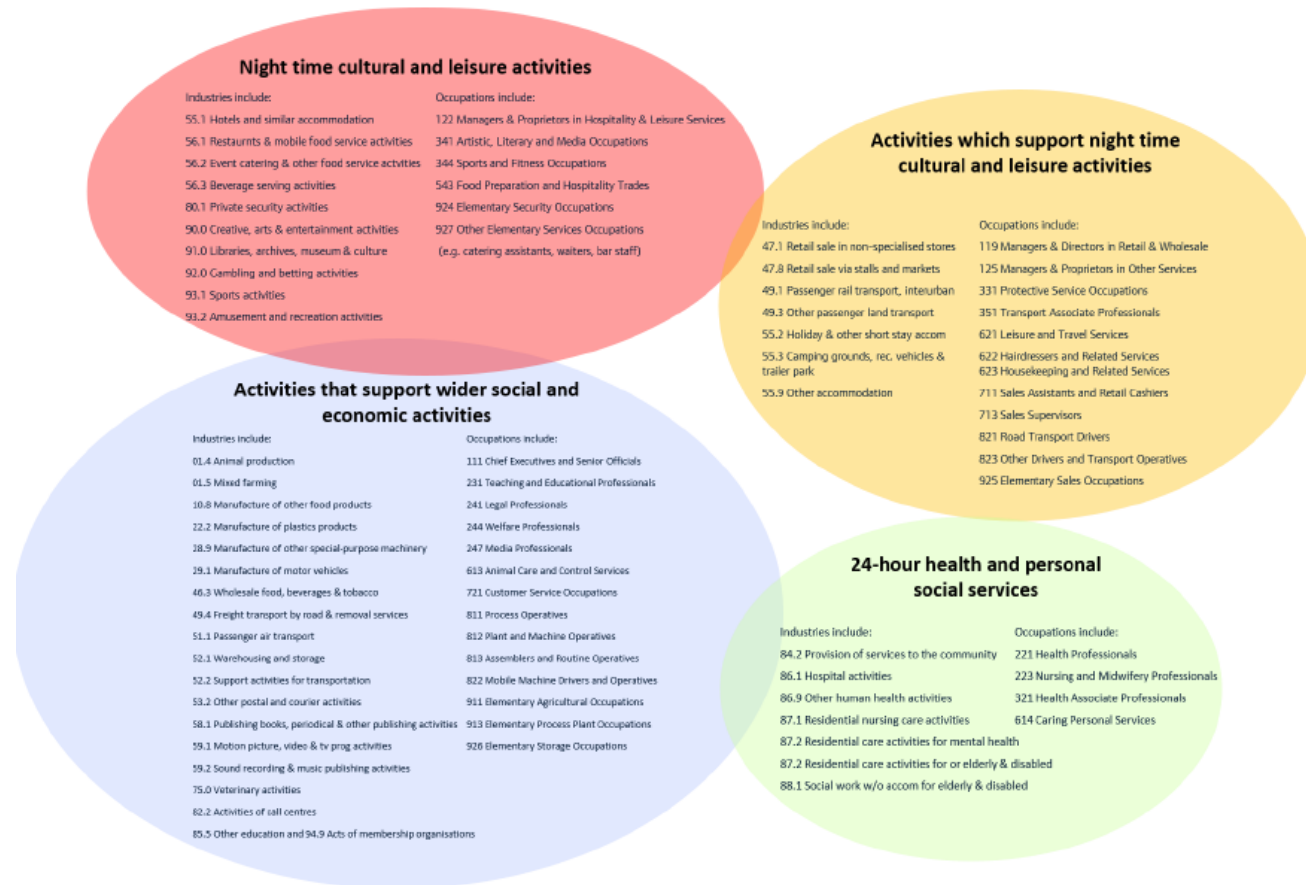
**Table 1: Night workers by industry (top 10) in London, 2023**

Industry	Night workers	Share of night workers in industry
Professional services	231,000	25%
Health	181,000	32%
Transport & storage	147,000	55%
Retail	94,000	29%
Public admin & defence	94,000	21%
Education	94,000	19%
Information & communication	92,000	20%
Hospitality	77,000	48%
Finance & insurance	76,000	14%
Arts & recreation	68,000	55%

Source: Labour Force Survey 2023, UK Data Service.

Note: Based on place of work.

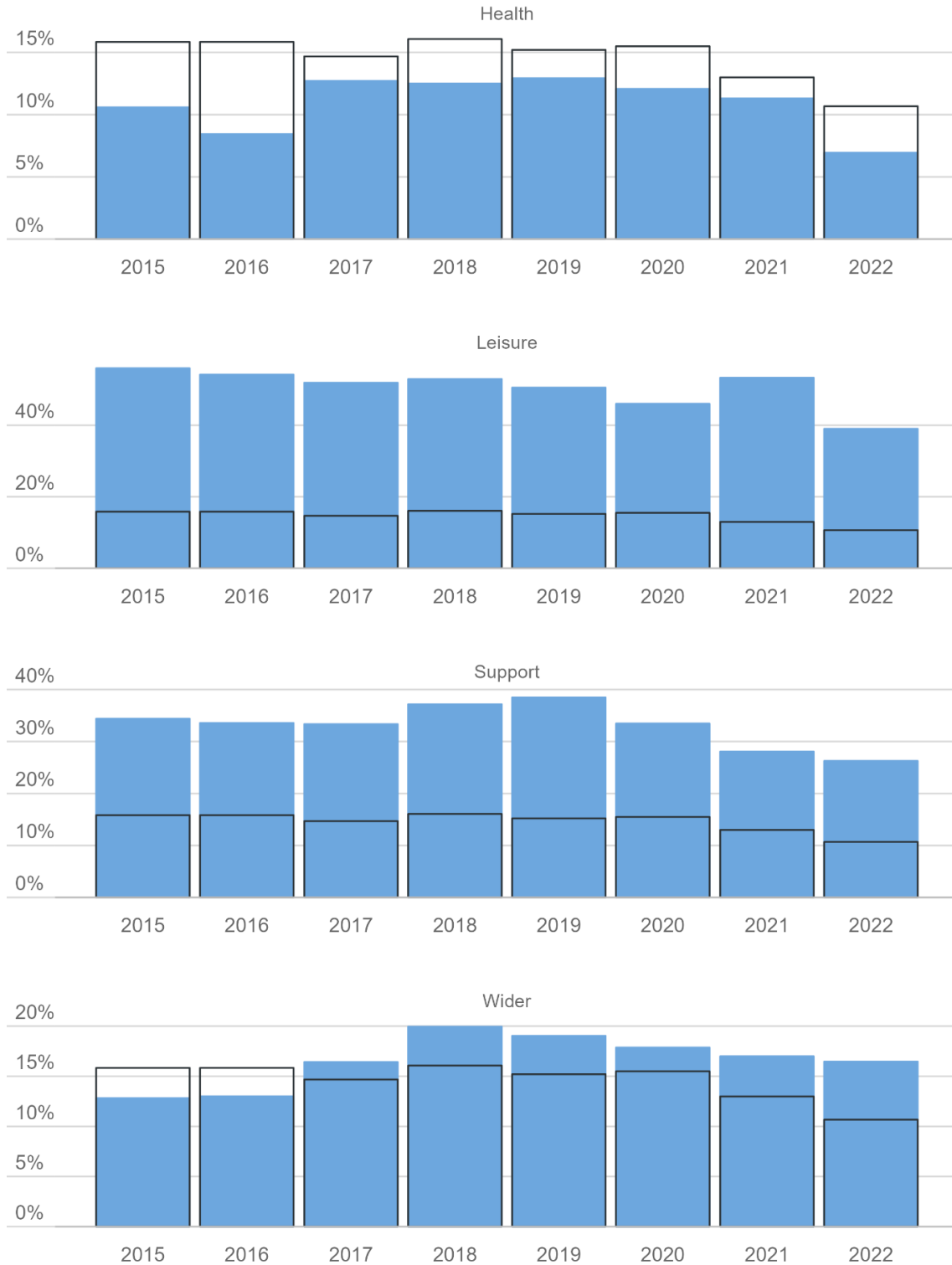
Figure 5: Night-time classification



Source: London At Night: An Evidence Base For A 24-Hour City (2018).: Night-time Commission’s Data and Research Group and GLA classification.

**Figure 6: Workers earning below London Living Wage, 2015-2022**

The blue shaded area shows the share of workers in the night-time industries categories that earn below the London Living Wage, 2015-2022. The grey box shows the share of workers earning below the London Living Wage in daytime industries.

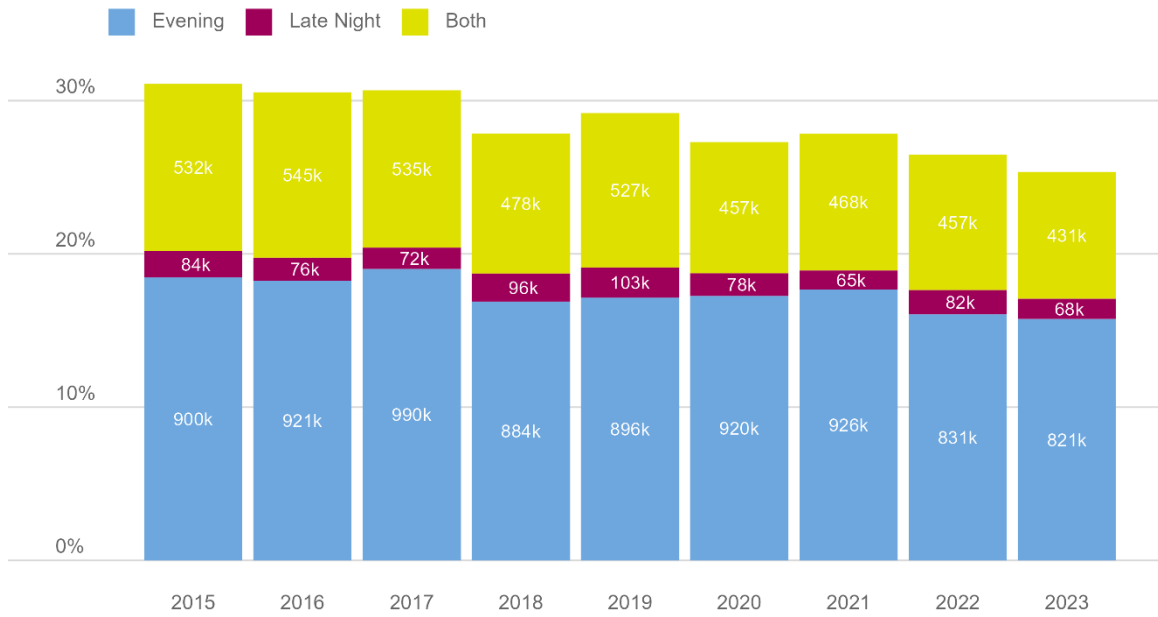


Source: Annual Survey of Hours and Earnings 2015-2022, Secure Research Service.

Notes: Based on place of work. Pay data refers to April of each year. London Living Wage refers to the rate set in Autumn of that year.

**Figure 7: Night workers by usual work hours, 2015-2023**

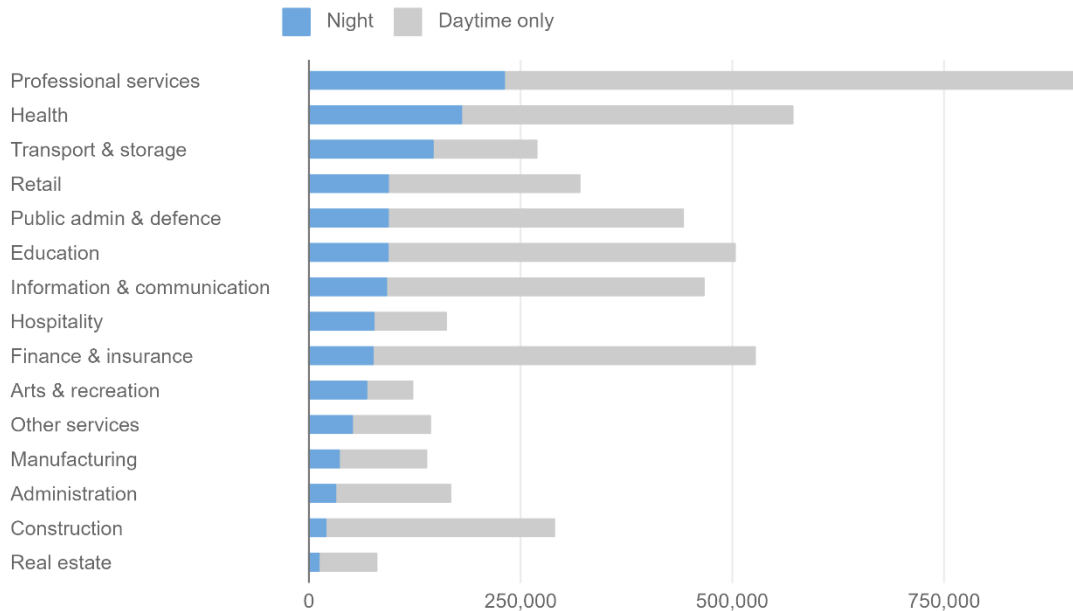
Share of all workers in London. Worker counts by category in text labels.



Source: Labour Force Survey 2015-2023, UK Data Service.

Notes: Based on place of work.

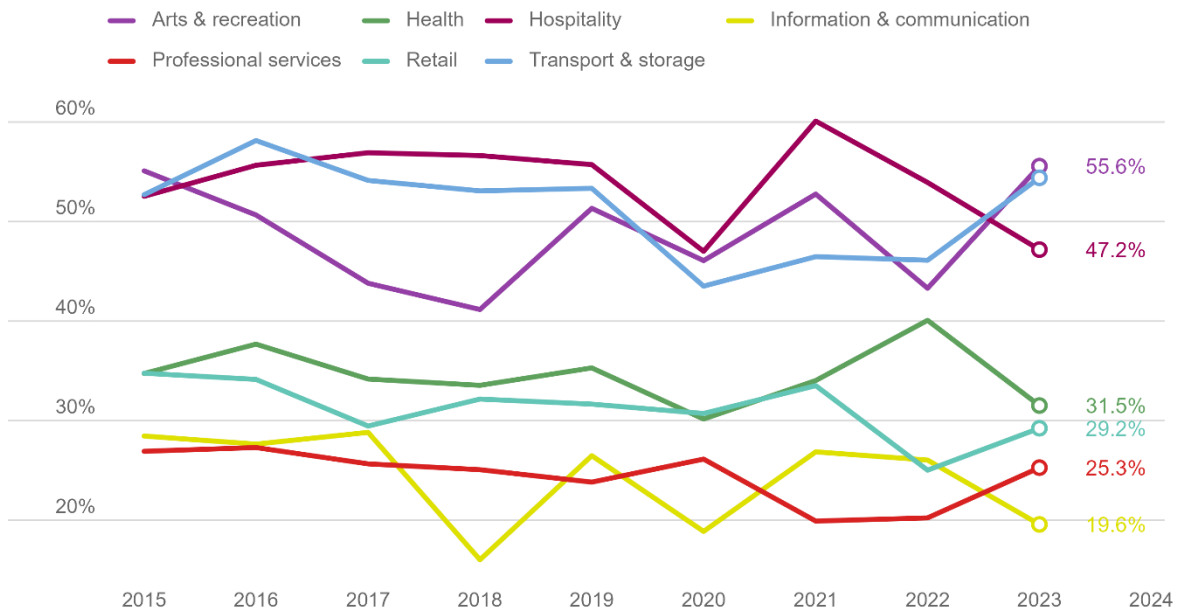
**Figure 8: Number of night workers by industry in London, 2023**



Source: Labour Force Survey 2023, UK Data Service.

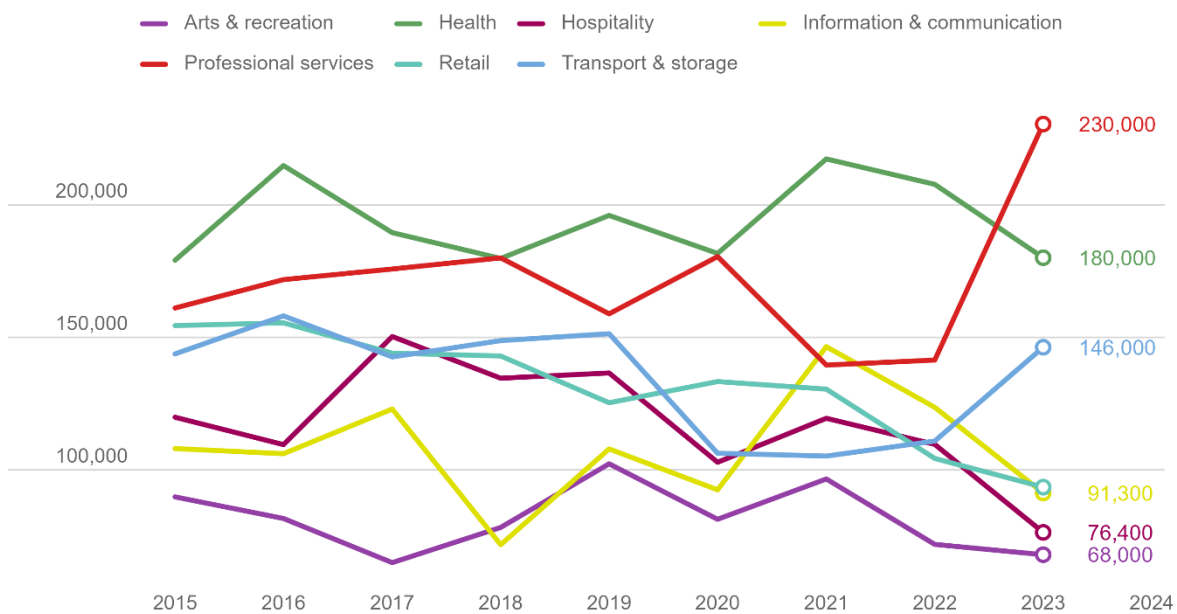
Notes: Based on place of work. Excludes industries with less than 50 thousand workers.

**Figure 9: Night worker share by industry, 2015-2023.** Share of night workers within selected sectors in London



Source: Labour Force Survey 2015-2023, UK Data Service.  
Notes: Based on place of work.

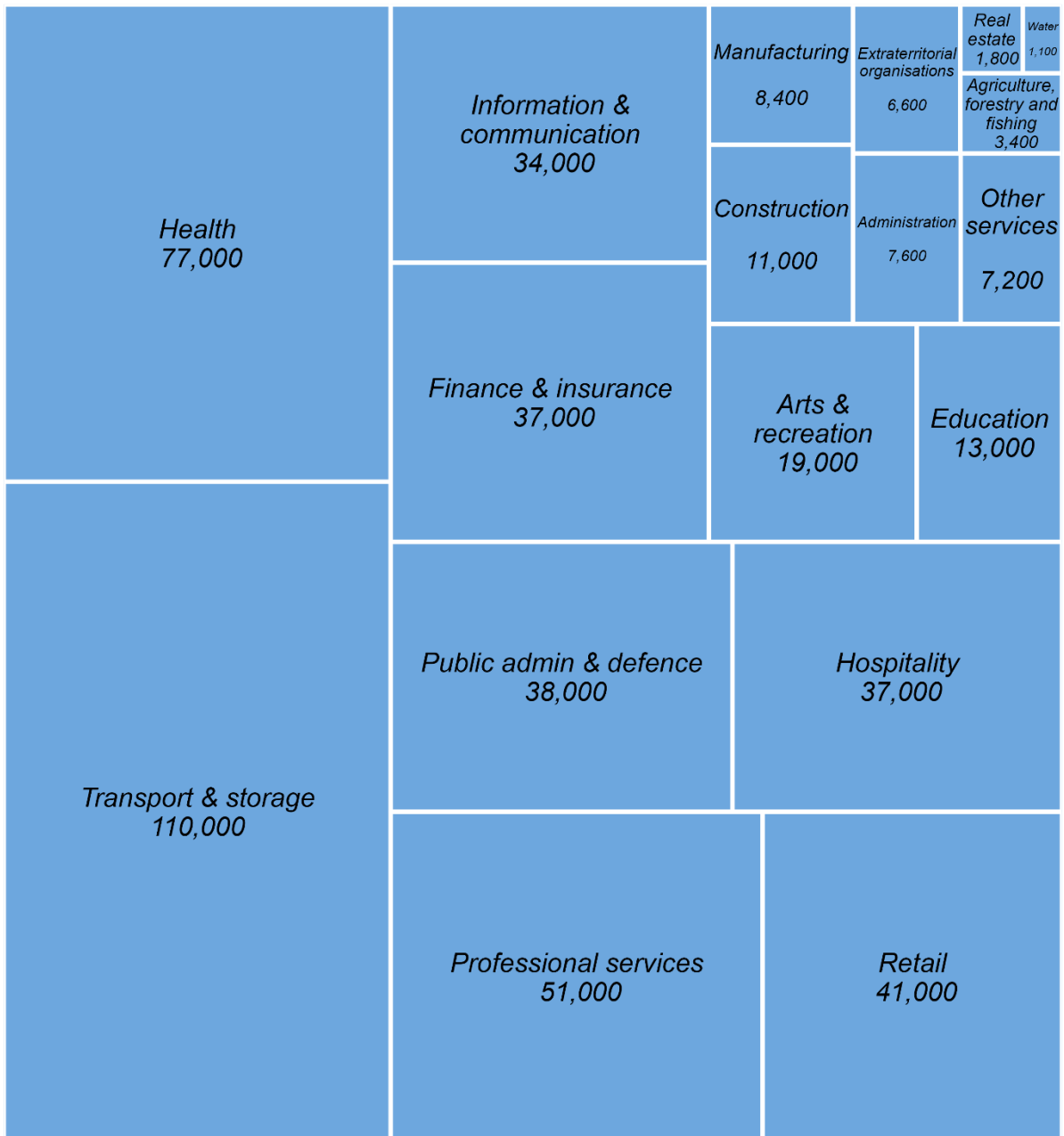
**Figure 10: Night workers by industry, 2015-2023.** Number of night workers within selected sectors in London



Source: Labour Force Survey 2015-2023, UK Data Service.  
Notes: Based on place of work.



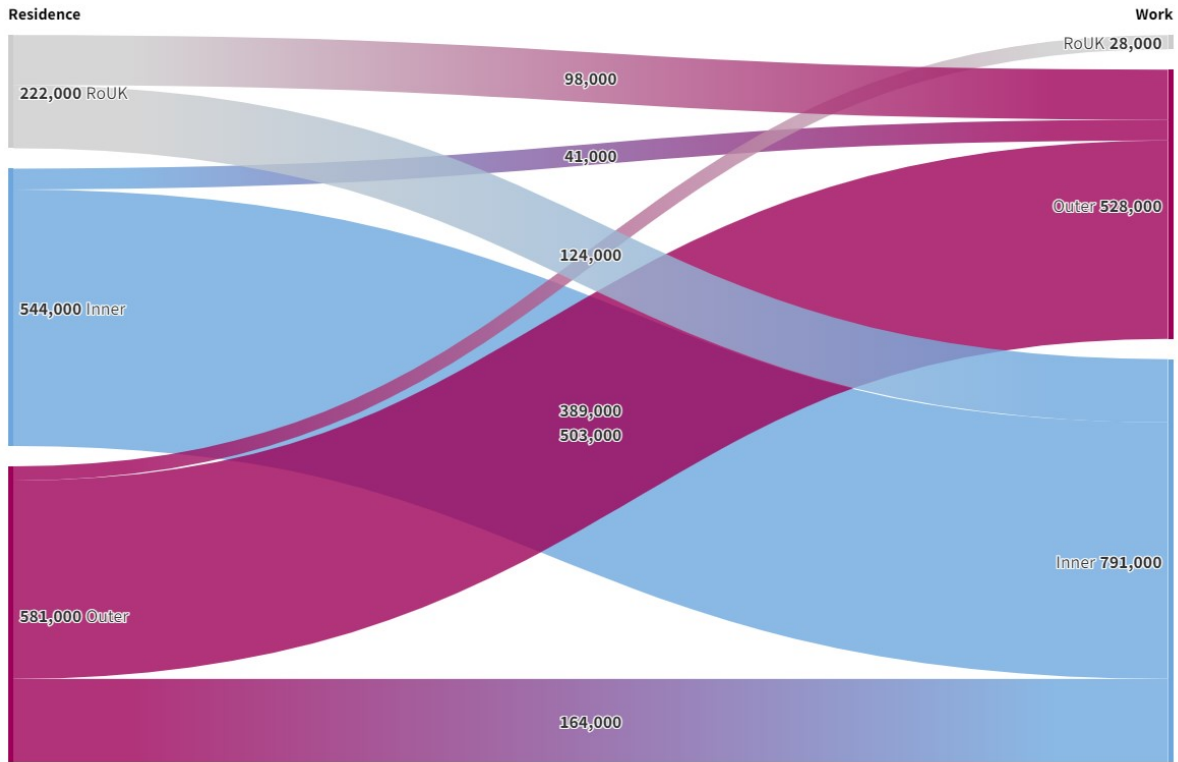
**Figure 11: The number of late-night workers by industry in London, 2023**



Source: Labour Force Survey 2023, UK Data Service.

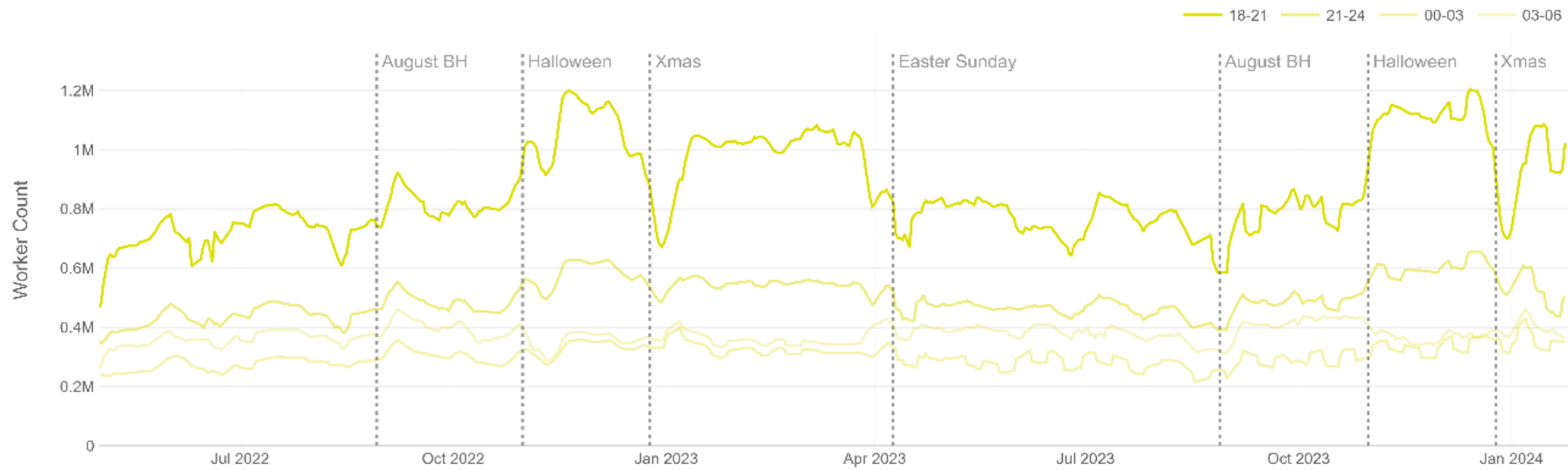
Notes: Based on place of work. Figures may not sum to accurate totals due to rounding.

**Figure 12: Flow of night workers 2023.** Residents or workers in Inner London, Outer London and Rest of UK



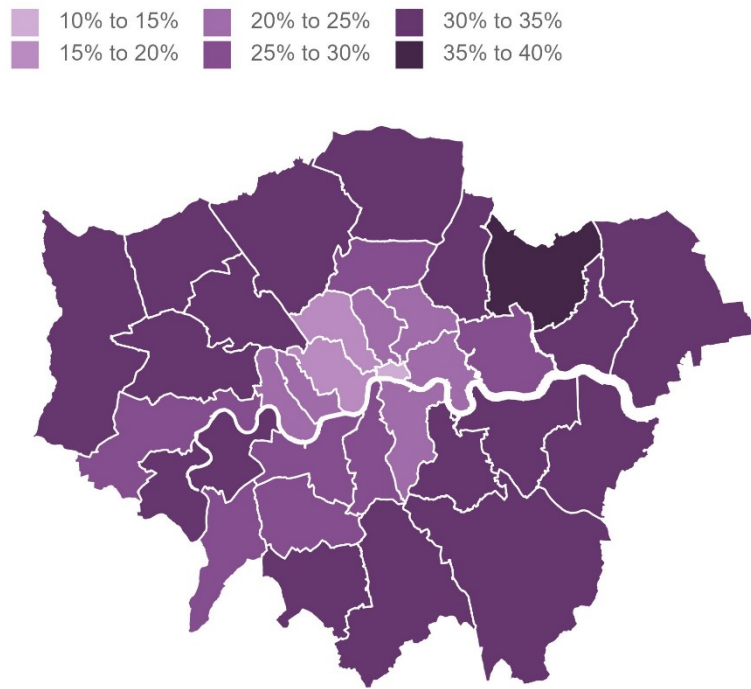
Source: Labour Force Survey 2023, Secure Research Service.

Figure 13: Night-time Workers in London, 2022-2024



Source: BT footfall data 2022-2024, GLA High Streets Data Service analysis.

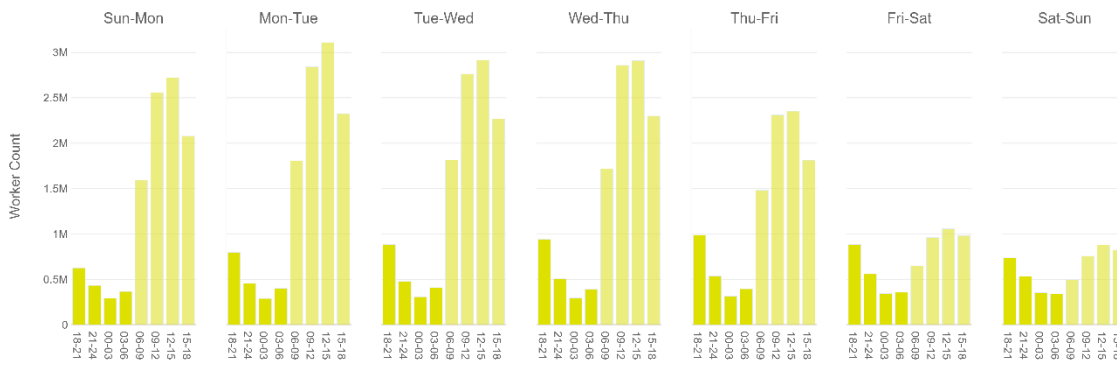
**Figure 14: Share of workers within each borough who work at night, 2022-2023**



Source: BT Footfall data 2022-2023, GLAE analysis.

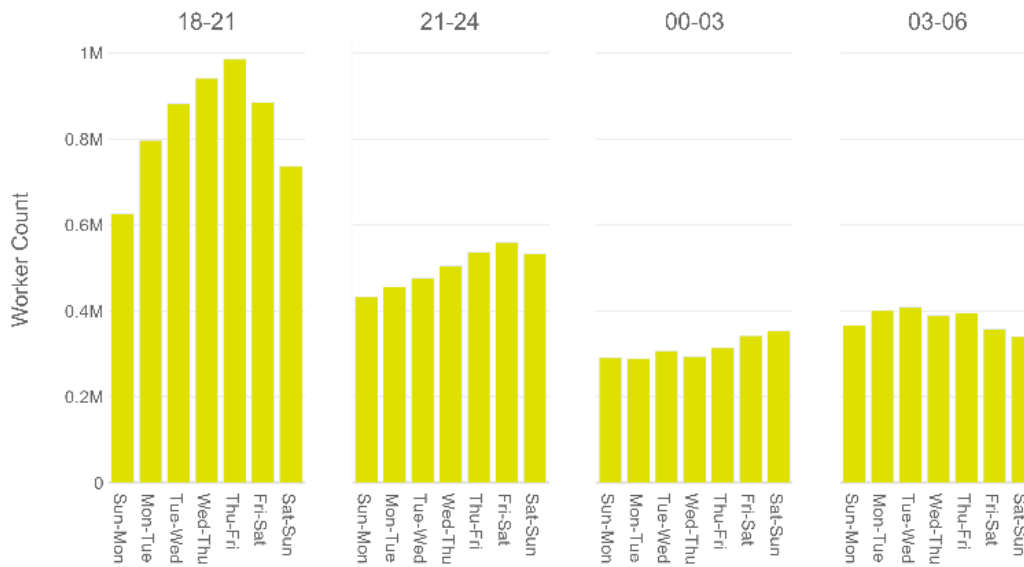
Notes: Night work defined as working 6pm-6am. Contains Ordnance Survey data.

**Figure 15: Worker counts in London by time of day, 2023**



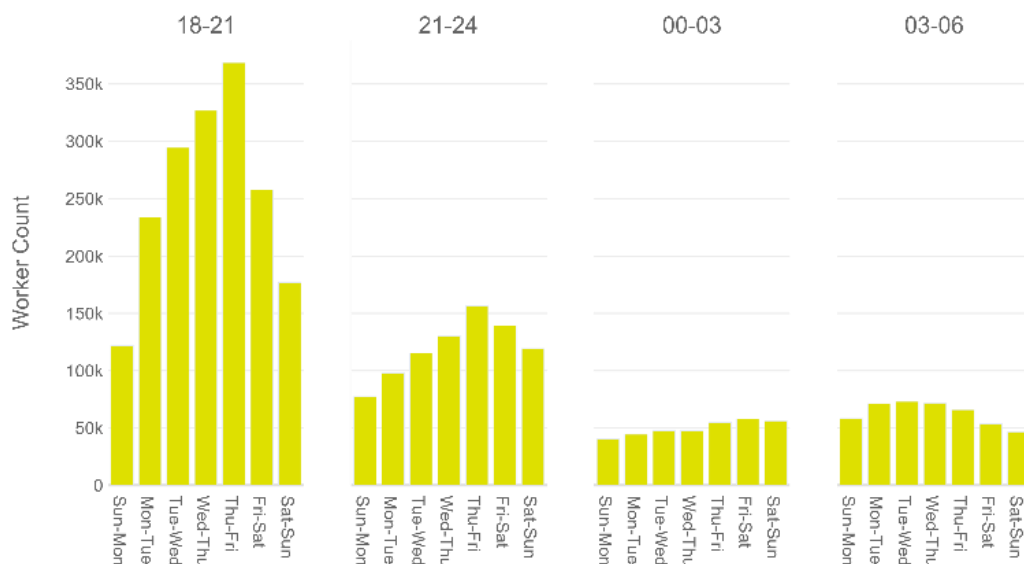
Source: BT footfall data 2023, GLA High Streets Data Service analysis.

**Figure 16: Night-time worker counts in London by time of day, 2023**



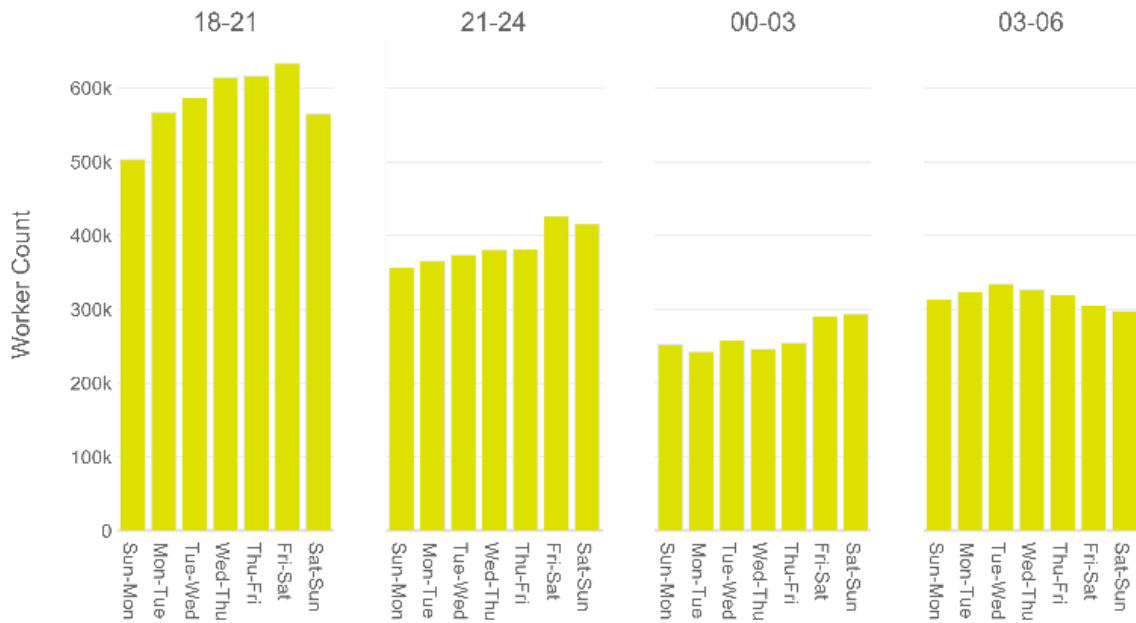
Source: BT footfall data 2023, GLA High Streets Data Service analysis.

**Figure 17: Night-time worker counts across CAZ in London by time of day, 2023**



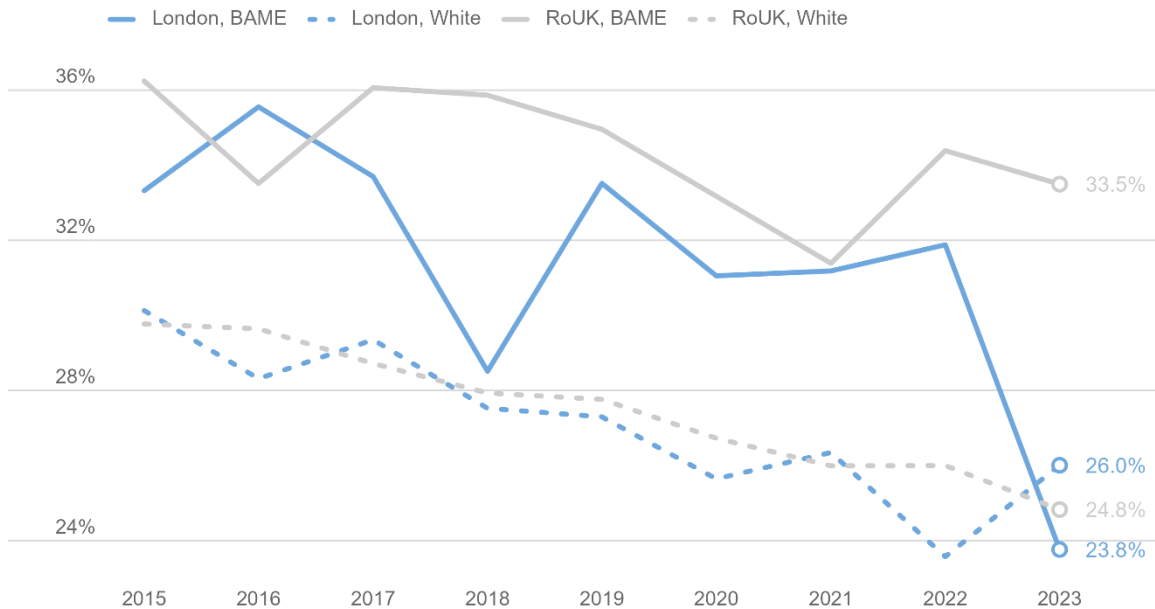
Source: BT footfall data 2023, GLA High Streets Data Service analysis.

**Figure 18: Night-time worker counts across non-CAZ in London by time of day, 2023**



Source: BT footfall data 2023, GLA High Streets Data Service analysis.

**Figure 19: Night workers by ethnicity, 2015-2023.** Share within ethnicity, London and Rest of UK



Source: Labour Force Survey 2015-2023, UK Data Service.

Notes: Based on place of work.



## 2. London's 24 Hour Economy

### Introduction

This chapter focuses on the broader night-time economy, presenting new findings on: the number of employees and businesses in the night-time industries; the distribution of activities across London's boroughs and neighbourhoods; the pubs sector and late-night licencing; and Londoners' card spending patterns at night.

The headlines findings can be summarised as:

- Spend data shows that for many boroughs and town centres outside the CAZ, the night-time is key part of the economy, in some places accounting for around one-third of all in-store card spending.
- The night-time industries have been growing, both in terms of employment and by number of businesses.
- The number of licenced premises across London has been growing over the last decade, and since 2017/18.

### Data and definitions

The definitions for Night-time Industries were introduced in Chapter 1 (See Figure 5). To recap, these comprise:

- The **Night-time cultural and leisure** sector such as hotels, restaurants, and bars, as well other creative, sports and recreation businesses.
- **Activities which support night-time cultural and leisure** such as road, tube and rail transport and some retailers such as supermarkets and convenience stores.
- **24-hour health and personal social services** such as hospitals, nursing homes and community services.
- **Activities which support wider social and economic activities** such as some types of manufacturing, wholesalers, freight operators, postal services and publishers.

The Home Office publishes **Alcohol and Late-Night Refreshment Licensing** data, most recently in October 2022. This dataset collects information from local authorities across England and Wales and covers the period from 2011/12 to 2021/22.

This data should be treated with caution because of significant gaps. Data was not collected in 2014/15, 2018/19 or 2019/20 and is not complete for every local authority or for every year.

To provide a more complete picture of trends across the whole 2011/12 to 2021/22 period we have imputed values for missing data. See accompanying dataset for a full description of the method and data used. These results should still only be used with caution and as indicative figures only.

**To better understand spending at night in London, we use Mastercard's Retail Location Index.** This uses anonymised and aggregated transaction data from billions of cards to measure sales, transactions and accounts. Mastercard uses the geocoded location of merchants aggregated to an area and transaction data to create a timeseries. The data only includes physical sales (i.e. not online).

The MRLI is a relative index compared to a common base area and time frame for each measure. The index is provided to the GLA at a 150m resolution, which has been combined into geographies, such as boroughs or town centres. The index allows relative comparison over time and space. The MLRI is adjusted for inflation by HSDS.

**Data on London's pubs is taken from the 2023 GLA Pubs Audit.** It is drawn from the ONS Inter-Departmental Business Register (IDBR). Businesses are classified by their primary trading activity only. At this level of detail there is a risk that some pubs and bars are classified under a related industry (e.g. hotels). This means that the numbers in this note could differ from those reported elsewhere, such as from the British Beer and Pubs Association or the Campaign for Real Ale.

The data is taken from the IDBR on March 12 of each year with 2022 being the latest year available. This means that it is not yet possible to see the full impact of the coronavirus (COVID-19) pandemic on pubs in London.

Estimates for the number of pubs and employees have been rounded. Caution should therefore be taken when interpreting the data in this note, particularly year-on-year changes. Extra care should be taken with percentage changes.

## Key headlines

1. **The number of employee jobs (including working owners) in London's Night-time Industries (NTIs) has grown by 151,000 (8.9%) since 2017**, with the Cultural & Leisure grouping of Night-time Industries seeing the fastest growth (up 19.8%). Total NTI employee jobs reached 1.8 million in 2022. Across Great Britain's NTIs, growth was lower at 6.7%, with Cultural & Leisure jobs up 8.6%. (See Table 2.)
2. **The number of London business sites in the Night-time Industries rose by 11.3% between 2017 and 2023 to 135,700.** (See Table 3.) This includes 110,000 'micro' businesses with between 0 and 9 employees, 21,000 'small' businesses with 10 to 49 employees, around 4,000 'medium' businesses with 50 to 249 employees, and around 800 businesses with 250 or more employees. (See Table 4.)
3. **Growth trends in the number of businesses** in each of the Night-time Industries have been similar across London, the most comparable other city region in the UK, the Greater Manchester Combined Authority, and of England as a whole.
4. **In terms of businesses with 10 or more employees, London has had somewhat higher growth, taken over the 2010-2023 period, in all four NTIs.** In Cultural & Leisure, numbers fell in London over the pandemic but have since recovered. (See Figure 21.)
5. **Regional growth trends are more mixed in the number of micro businesses.** In Cultural & Leisure, for instance, while England has seen a rise of 23% and London 31%, Manchester has added 45%. (See Figure 23.)
6. **Cultural & Leisure accounted for 38% of employee jobs in the NTIs in 2022**, Health and Personal Services for 26%, Wider Social & Economic activities for 23% and Support for Cultural & Leisure for 13% (See Figure 24 & Figure 25).
7. **Restaurants (with 265,000 employee jobs in 2022) and hospitals (with 253,000 jobs)** are by far the two largest employers within the Night-time Industries.
8. **Part-time employment is most common in the Cultural & Leisure NTI.** Around 286,000 people (42%) worked part time in the C&L industries in 2022. In the Support industries for C&L there were around 108,000 part-timers (45%), in Health and Personal Services 128,000 (27%) and in the Wider Social Economic activities 90,000 (22%). These trends have been relatively stable over time (See Figure 26)
9. **The Central Activities Zone contains a high share (42%) of the number of employees in the Cultural & Leisure industries** but only 26% of Health workers, 24% of Support for C&L and 36% of Wider Social & Economic activities (See Figure 27).
10. **Jobs in the Night-time Industries are distributed across London.** Health and Personal Industries are tightly clustered around hospitals, while Wider Social & Economic activities around transport corridors. Support jobs are more widely distributed (See Figure 28).
11. **Micro businesses are very-widely distributed across London**, particularly in the Cultural & Leisure and Wider Social & Economic sectors (See Figure 29).

12. **Revisions to previously published economic data can sometimes change our understanding of a narrative.** This happened in December 2023 when the Office for National Statistics produced its annual revision of Workforce Jobs after benchmarking to employer survey data.
13. **It showed that London’s hospitality sector** (Accommodation and Food & Beverage Services) **recovered much faster and stronger from the pandemic than previously thought.** Jobs in the sector rebounded to their December 2019 level a full year earlier than the June 2023 date previously published. By September this year there were 111,000 more jobs (24%) than pre-pandemic (458,000 jobs). (See Figure 30.)
14. London’s pubs are key part of its economy, both day and night. The GLA Pubs Audits of 2022 and 2023 showed that the number of pubs in London had stopped declining around 2015 following 15 years of a high level of closures. **The latest Office for National Statistics data from 2022 showed London pub numbers had stabilised at around 3,600.**
15. **In 2022, London saw the first increase in the number of smaller pubs since 2002,** with small pubs outnumbering larger pubs.
16. **From 2020 to 2022, 12 boroughs had an increase in pub numbers,** nine had a decrease and the rest remained the same. Pub numbers had a particularly large rise of 38% in Waltham Forest.
17. While pub numbers reflected an overall UK trend, **the number of employees increased by more in London (12%)** than the UK (3%) from 2002 to 2022.
18. **Home Office Alcohol and Late Night Licencing data shows that London’s licenced premises numbers have risen strongly over the last decade,** and generally out-grown comparable areas such as the Greater Manchester and West Midlands Combined Authorities.
19. London had around **36,000 licenced premises in 2021/22,** an increase of around 5,000 (or 17%) on 2011/22.
20. **Of these, around 31,000 had licences to sell alcohol (up 16% on 2011/12),** including 8,100 with on-sales only (up 14%), 10,600 with off-sales only (up 12%), and 12,800 with both on- and off-sales (up 14%).
21. To put these trends into context, we **compare growth rates with Greater Manchester Combined Authority and West Midlands Combined Authority:** London’s growth rate was higher than either. GMCA had around 9,000 licences (up 2%) including 1,400 on-sales licences (up 9%). WMCA had 8,900 premises licences (up 5%) including 1,200 on-sales licences (up 16%).
22. **The number of premises with a 24-hour alcohol licence in Greater London increased by around 65%** from around 1,200 in 2011/12 to around 1,900 in 2021/22. GMCA had 235 24-hour premises in 201/22, up 39% and WMCA had 367, up 54%.

23. **The number of pubs, bars and nightclubs with 24-hour alcohol licences in London jumped to 183 in 2021/22** from a level fluctuating between 50-60 over 2011/12 to 2017/18.
24. Greater Manchester has seen its number of these premises varying between 16 and 22 over the period, with West Midlands fluctuating between 33 and 41. **Neither has seen the large increase between 2017/18 and 2021/22 that London experienced in 24-hour pubs, bars and clubs.**
25. In London, the **number of supermarkets and convenience stores** with a 24 hour licence increased from around 500 in 2011/12 to around 700 in 2021/22. The number of **hotel bars** with a 24 hour licence has fluctuated from around 250 to around 400 since 2011/12 and currently stands around 340. The number of **other premises types** with a 24 hour licence remained around 200 from 2011/12 to 2017/18 **then increased significantly** to around 550 in 2021/22.
26. In the **late-night refreshment licence** category (anywhere selling hot food or drinks after 11pm e.g. Greggs or takeaways), there has been a small (4%) drop from around 17,600 in 2011/12 to 17,200 in 2021/22. Greater Manchester has seen a 14% fall, and West Midlands a 4% fall.
27. **London attracted 5.4 million overseas visitors in the third quarter of 2023, with spending reaching a record £4.7 billion in the third quarter of 2023.** Visitor numbers still haven't fully recovered since the pandemic though, with 6.1 million arriving in the same quarter of 2019 (See Figure 32).<sup>9</sup>
28. **European visitors accounted for 50% of international tourists to London**, North America for 21% and other countries 29% in Q3 2023. However, visitors from countries outside Europe and North America spent more (44% of the total) (See Figure 33).
29. **Spending per visitor reached around £1,320 for these other countries**, compared to £870 for North Americans and £600 for Europeans (See Figure 34).
30. **Half of overnight visits from overseas to London in 2022 were for holidays**, while 28% were visiting friends or relatives and 15% for business.<sup>10</sup>
31. Spend data from MasterCard available from the GLA High Streets Data Service shows **that night-time spending grew strongly from early 2022 through to the end of the summer** then levelled off in 2023. (See Figure 35).
32. **Night-time spend typically peaks on a Friday evening in London as a whole.** However, the spend peaks on Thursday evenings in the CAZ. Saturday nights see the most post-midnight spend (See Figure 36, Figure 37, Figure 38, and Figure 39.)
33. **The MasterCard spend data shows that 1 in every 4 pounds is spent at night.** This is the proportion of in-store town centre retail spending that happens between 6pm and 6am.

<sup>9</sup> <https://www.visitbritain.org/research-insights>

<sup>10</sup> <https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2022>, data from International Passenger Survey.

34. Some boroughs see a much greater portion of total spend in the borough during the night than during the day. These are largely the same boroughs where the BT footfall data shows significant night-time activity: Hackney, Tower Hamlets, Southwark and Lambeth. **In Hackney, for instance, over one-third (36%) of all spending takes place between 6pm and 6am, while the London average is 25%** (See Figure 40).
35. Time use in London has changed since the pandemic, with Londoners spending more time travelling (around 40 minutes more a day), doing unpaid childcare and household work (around 20 minutes more), and spending more time on personal care and screen time (around 15 minutes more). As a result, they were working or studying slightly less (down around 10 minutes), but **also missing out on socialising, taking exercise or doing DIY and gardening** (down nearly an hour a day) (see Figure 41).



## Figures and Tables for London’s 24 Hour Economy

**Table 2: Employees in the Night-time Industries in London and Great Britain, 2022**

Area	Night-time Industry	Employees (2017)	Employees (2022)	Change	Change (%)
GB	Support for Cultural & Leisure	1,646,000	1,591,000	-55,000	-3.3
GB	Wider Social & Economic	2,351,000	2,576,000	225,000	9.6
GB	Health and Personal Services	3,128,000	3,376,000	248,000	7.9
GB	Cultural & Leisure	3,139,000	3,408,000	269,000	8.6
GB	All NTI	10,264,000	10,951,000	687,000	6.7
<b>GB</b>	<b>Total employees (all industries)</b>	<b>30,585,000</b>	<b>31,922,000</b>	<b>1,340,000</b>	<b>4.4</b>
London	Support for Cultural & Leisure	256,150	246,100	-10,000	-3.9
London	Wider Social & Economic	395,350	417,200	21,800	5.5
London	Health and Personal Services	449,000	472,000	23,000	5.1
London	Cultural & Leisure	586,000	702,000	116,000	19.8
London	All NTI	1,686,500	1,837,300	151,000	8.9
<b>London</b>	<b>Total employees (all industries)</b>	<b>5,272,250</b>	<b>5,716,250</b>	<b>444,000</b>	<b>8.4</b>

Source: Business Register and Employment Survey 2022, ONS

**Table 3: Total NTI businesses in Greater London, Greater Manchester, England, 2010-2023**

Year	Greater London	Greater Manchester	England
2010	90,720	20,545	568,005
2011	90,415	20,405	562,105
2012	95,630	20,840	574,425
2013	97,955	21,075	582,110
2014	103,025	21,800	599,585
2015	109,820	23,820	636,110
2016	115,575	24,935	656,560
2017	121,990	27,620	690,265
2018	120,725	30,100	688,980
2019	123,115	28,140	694,795
2020	127,495	28,680	714,955
2021	132,430	30,345	727,510
2022	135,855	31,005	739,710
2023	135,725	30,455	730,845

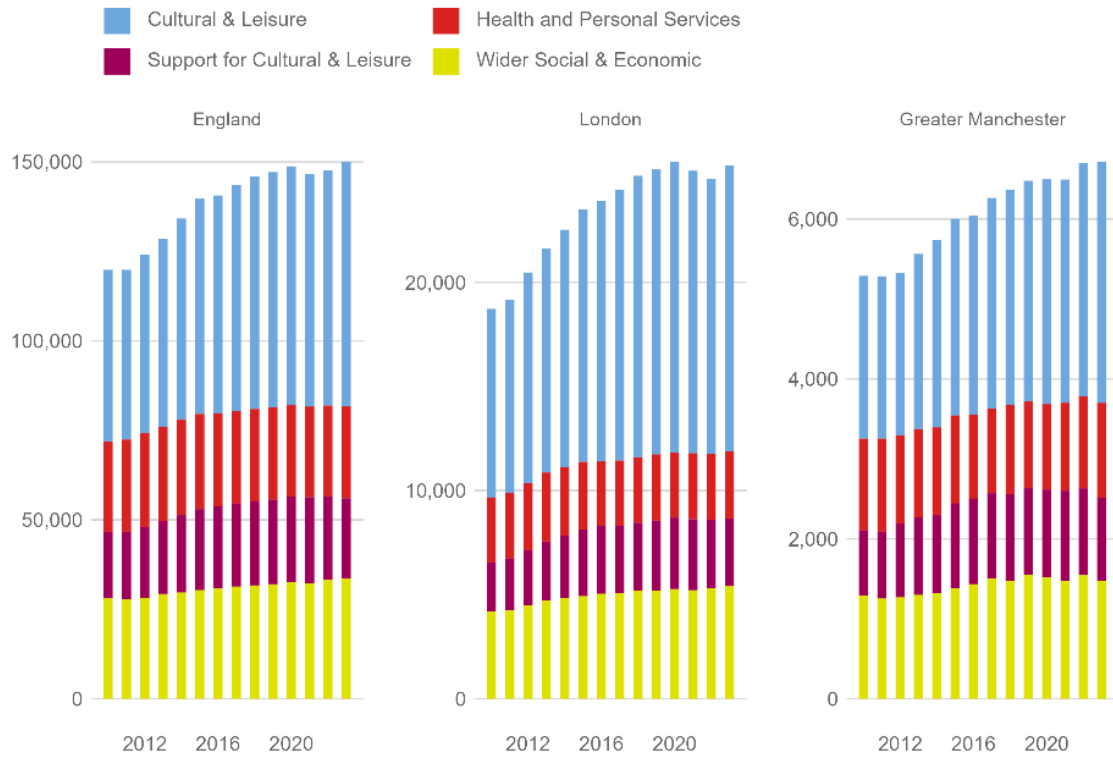
Source: UK Business Counts 2010-2023, Nomis

**Table 4: NTI businesses in London, by size, 2023**

Size	Cultural & Leisure	Health and Personal Services	Support for Cultural & Leisure	Wider Social & Economic	Total: Night-time Industries
Large	175	225	170	190	760
Medium	1,690	910	555	1,075	4,230
Small	11,870	2,105	2,505	4,140	20,620
Micro	45,545	7,780	12,880	43,870	110,075
<b>Total</b>	<b>59,290</b>	<b>11,040</b>	<b>16,120</b>	<b>49,275</b>	<b>135,725</b>

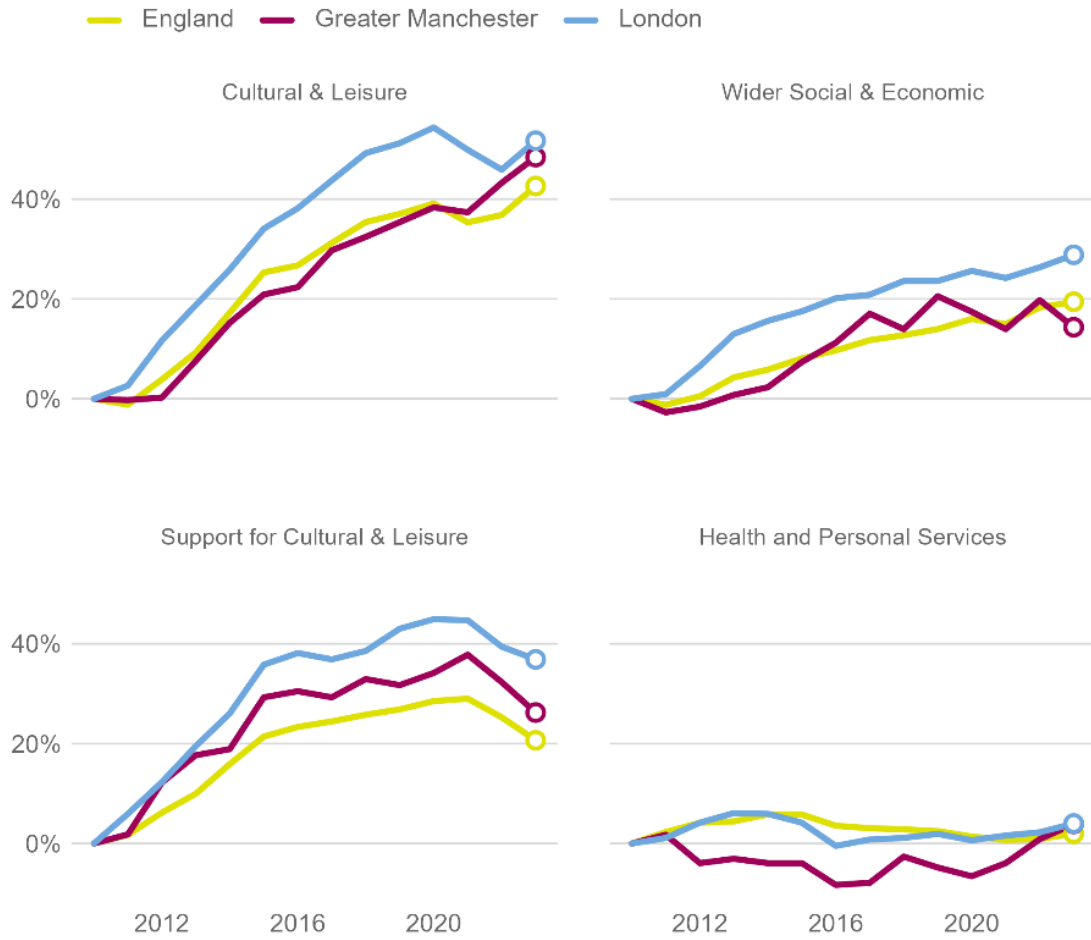
Source: ONS UK Business Counts 2023, Nomis

**Figure 20: Small, medium and large businesses in the Night-time Industries: Greater London, Greater Manchester and England, 2010-2023**



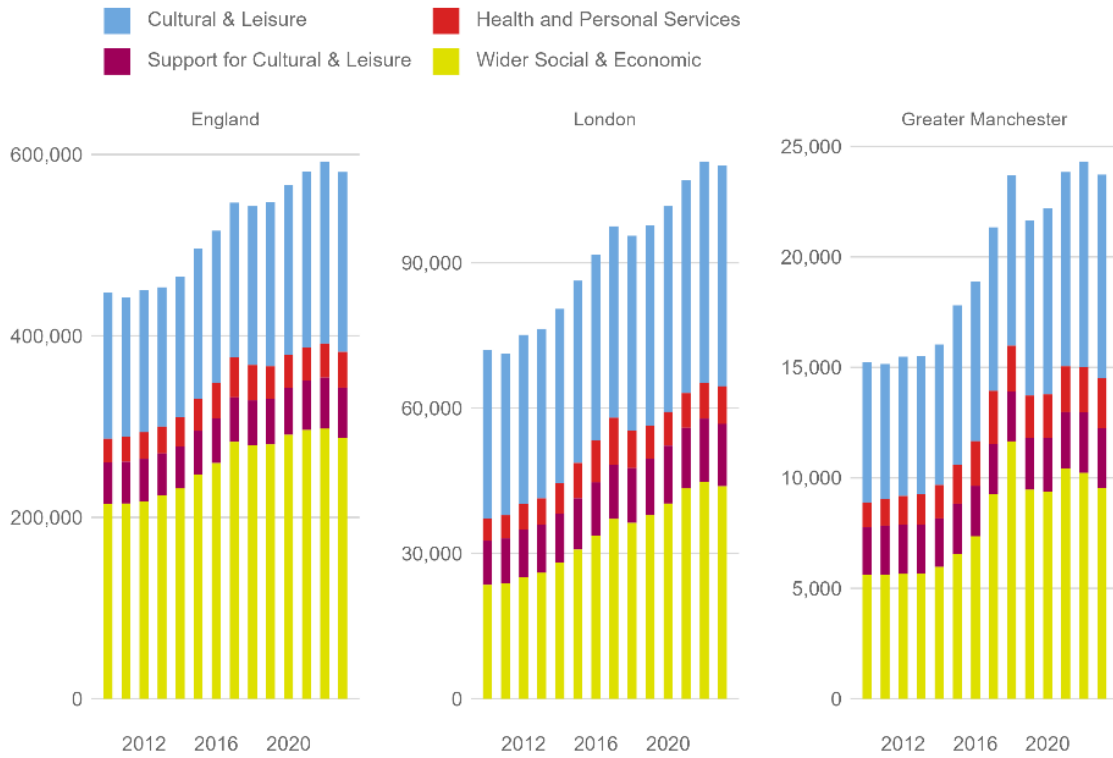
Source: UK Business Counts 2010-2023, Nomis.

**Figure 21: Cumulative growth of small, medium and large businesses in the Night-time Industries: London, Greater Manchester and England, 2010-2023**



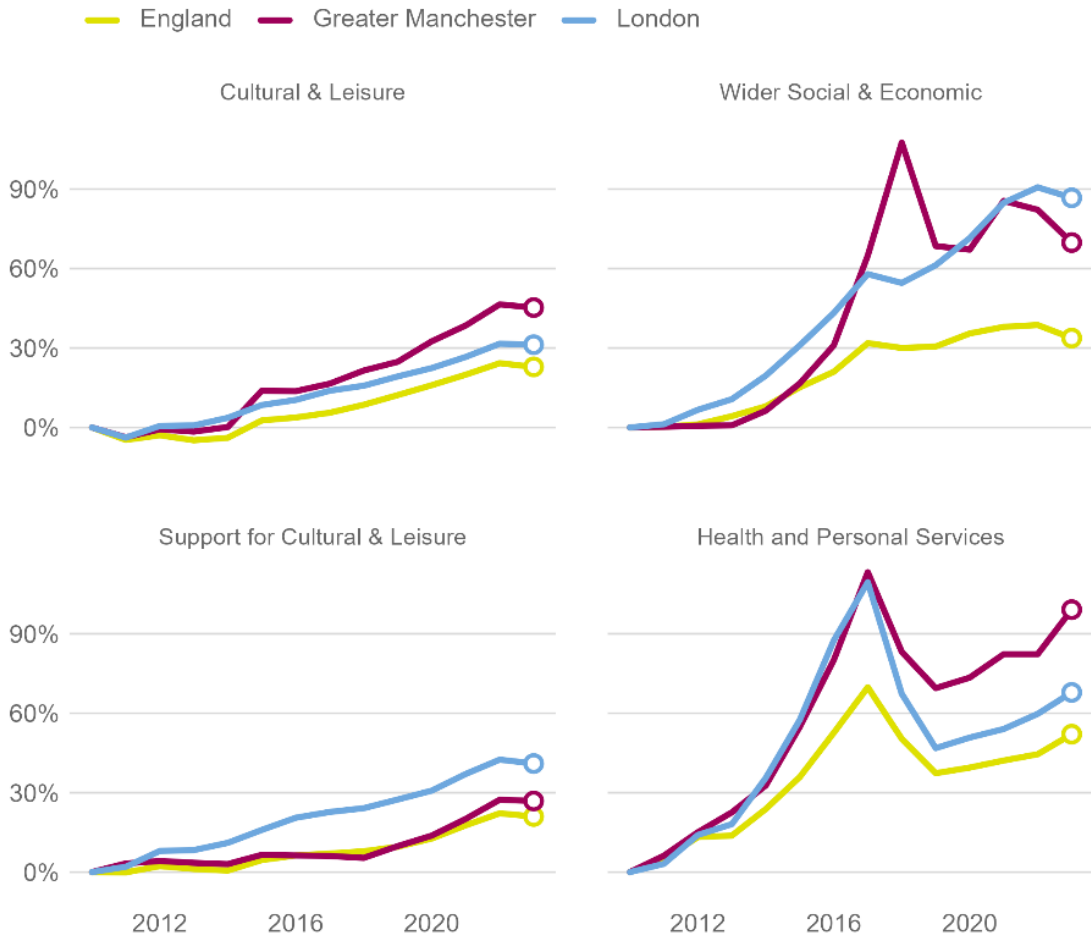
Source: ONS UK Business Counts 2010-2023, Nomis.

**Figure 22: Micro businesses in the Night-time Industries: London, Greater Manchester and England, 2010-2023**



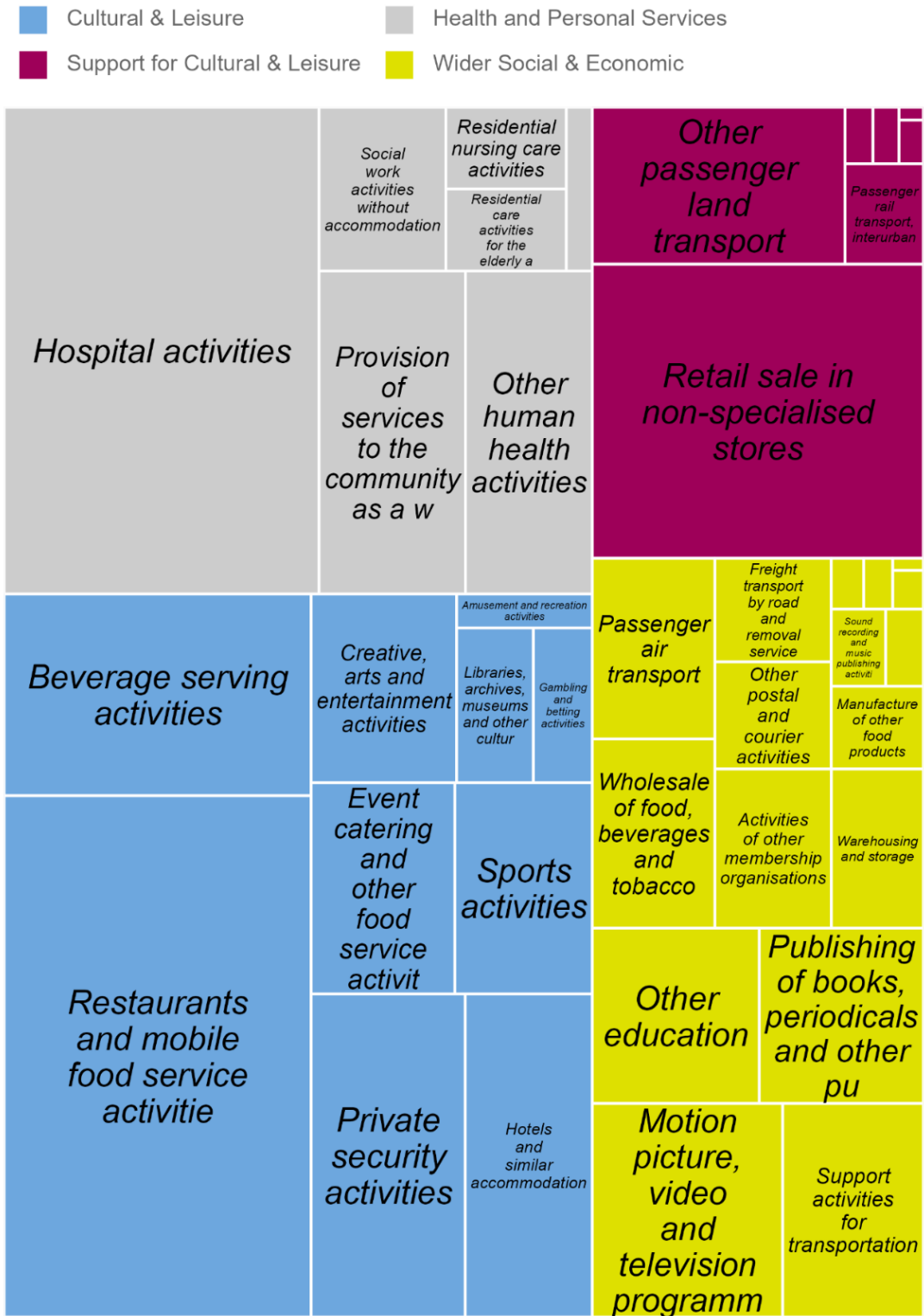
Source: ONS UK Business Counts 2010-2023, Nomis.

**Figure 23: Cumulative growth of micro businesses in the Night-time Industries: London, Greater Manchester and England, 2010-2023**



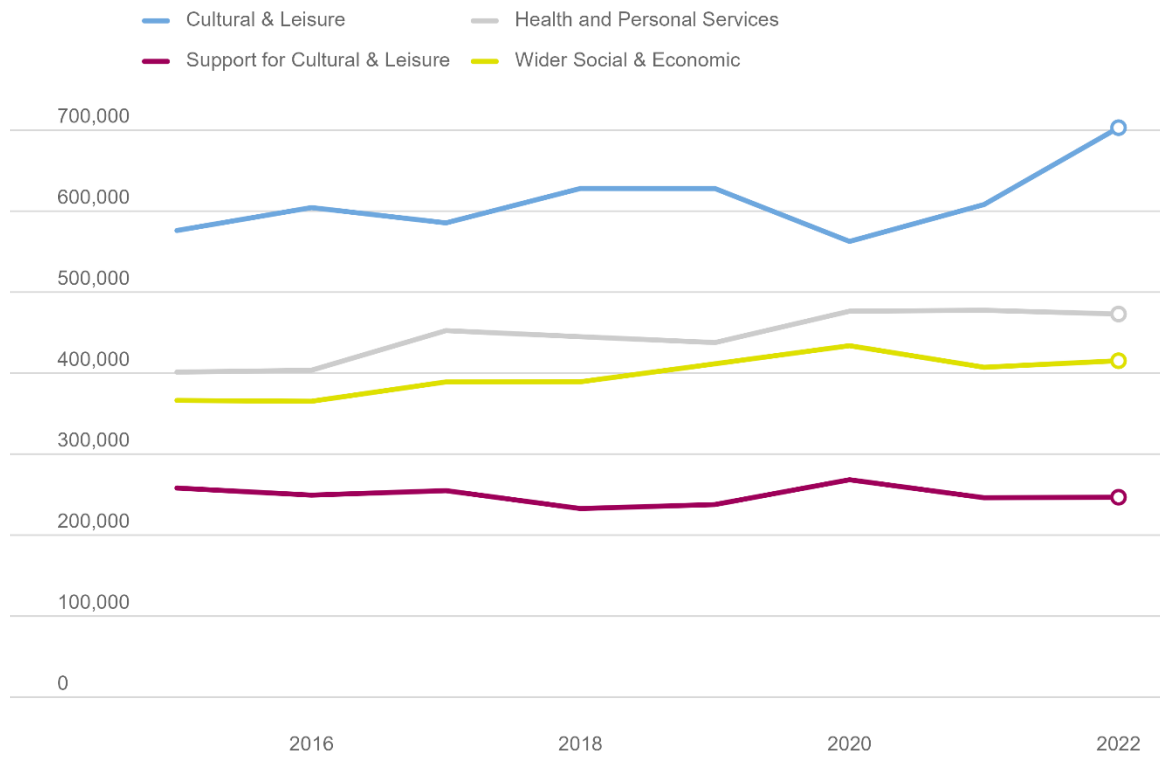
Source: ONS UK Business Counts 2010-2023, Nomis.

**Figure 24: Employees in Night-time Industries, detailed activities 2022**



Source: Business Register and Employment Survey 2022, ONS

**Figure 25: Employees in the Night-time Industries in London, 2015-2022**

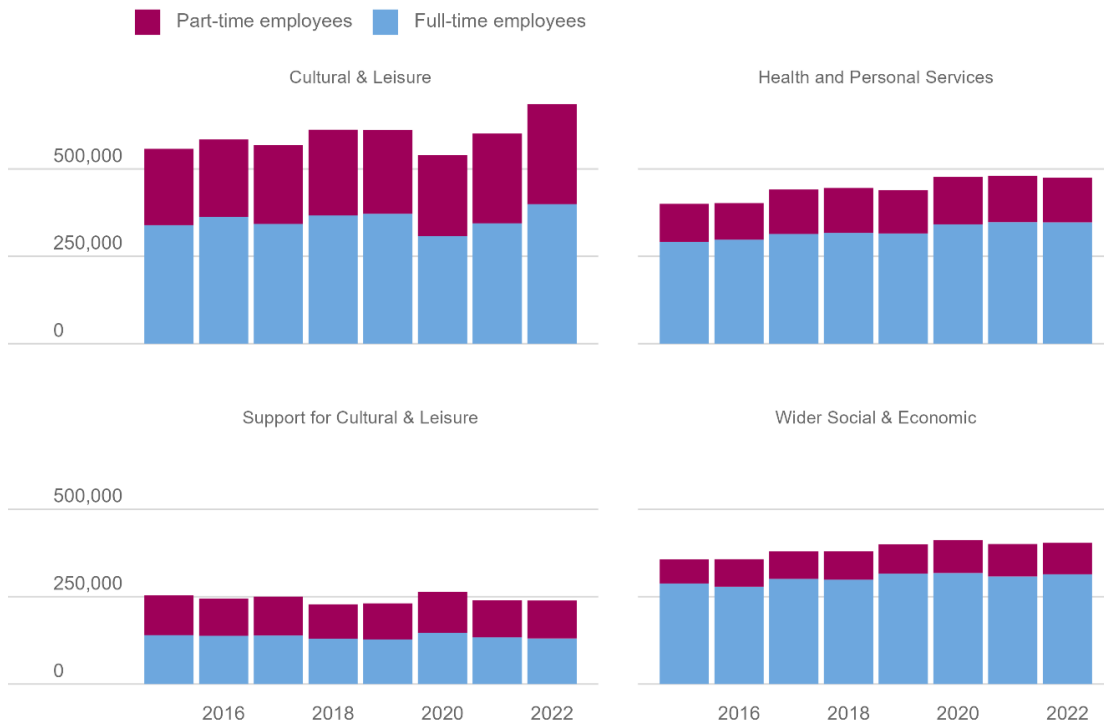


Source: Business Register and Employment Survey 2015-2022, ONS

Notes: See text for description of Night-time Industries.

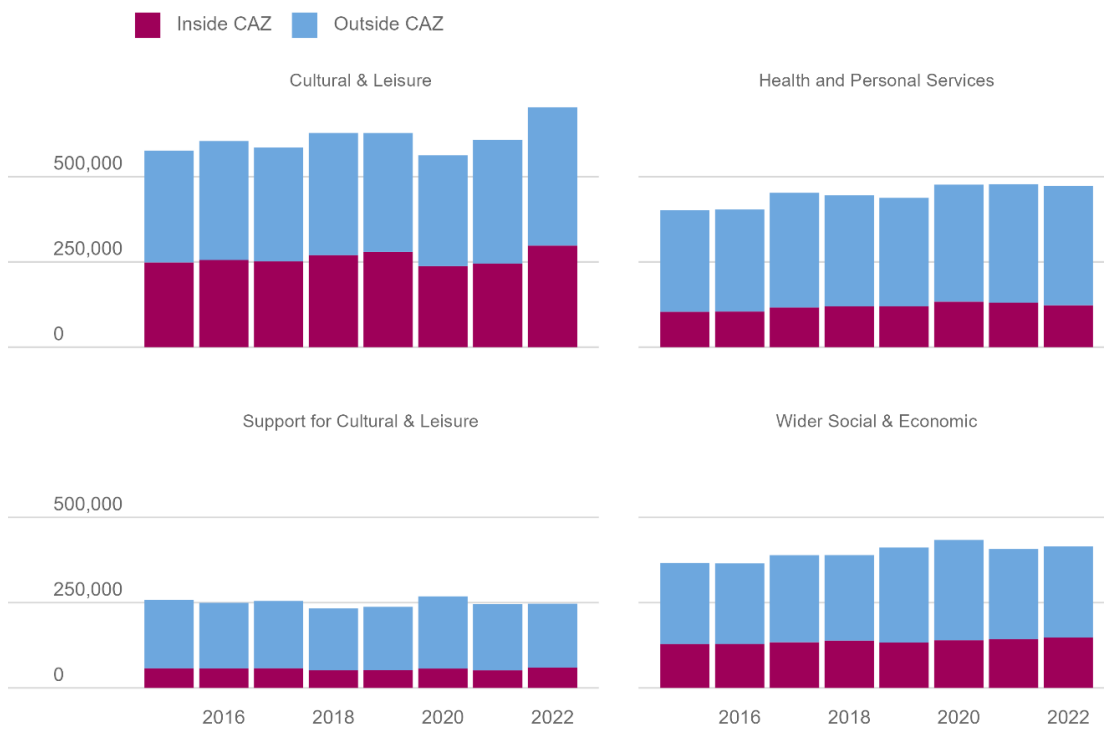


**Figure 26: Full- and Part-time employees in Night-time industries in London, 2022**



Source: Business Register and Employment Survey 2022, ONS.

**Figure 27: Employees by inside and outside CAZ in the Night-time Industries, 2022**



Source: Business Register and Employment Survey 2022, ONS.

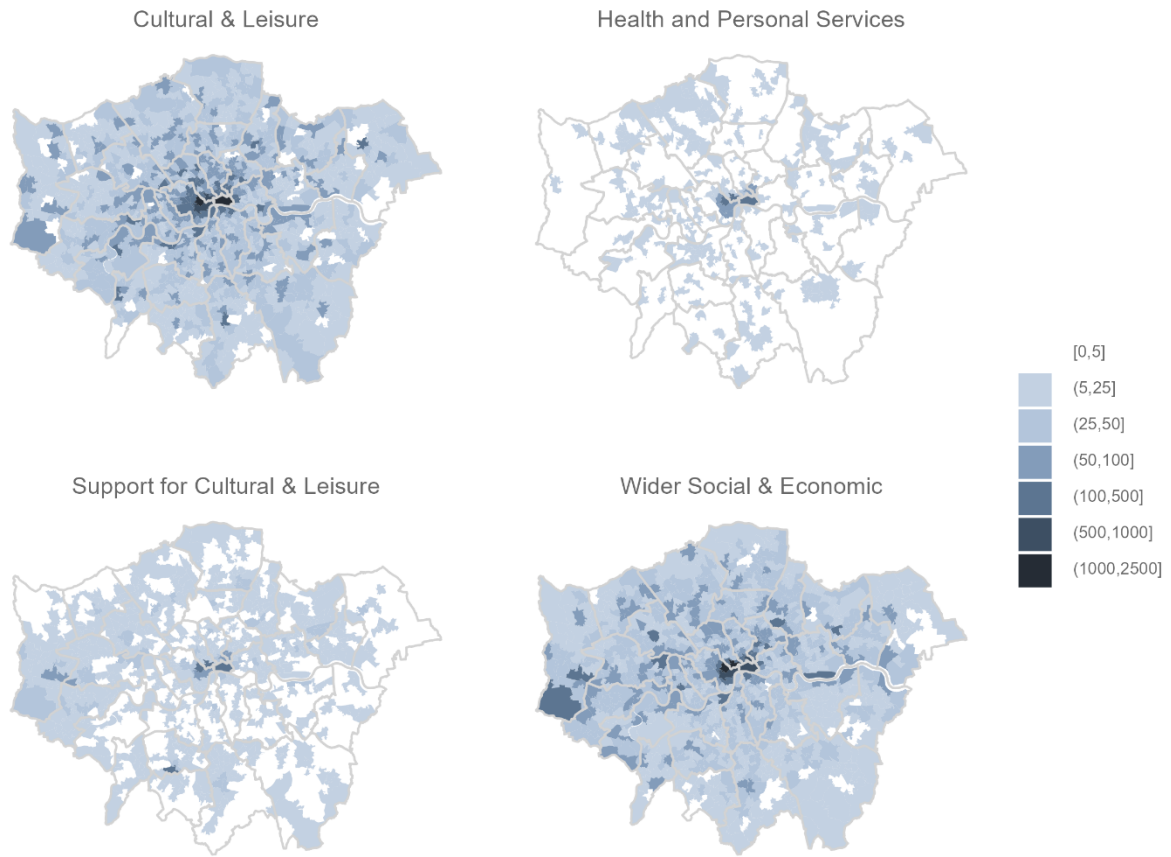
**Figure 28: NTI employee job density (employees/sq.km.) by MSOA, 2022**



Source: Business Register and Employment Survey 2022, ONS.

Notes: Contains Ordnance Survey data Crown copyright and database rights.

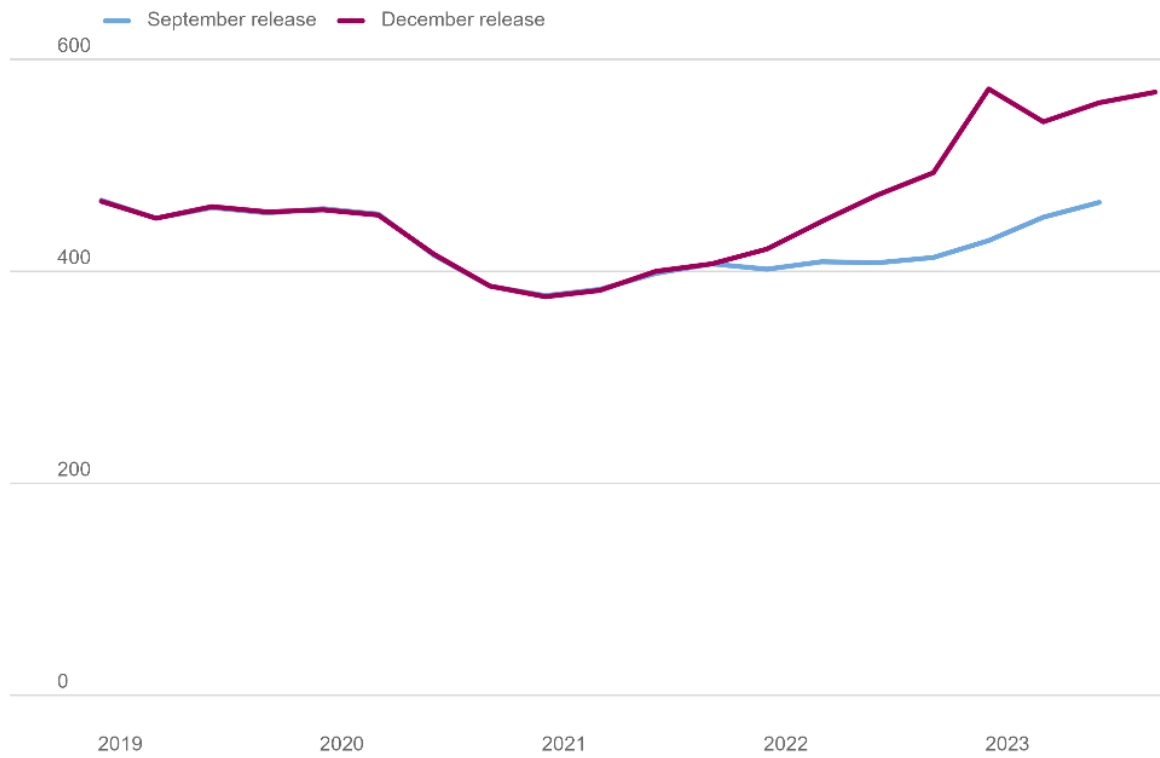
**Figure 29: Number of Micro NTI businesses by MSOA, 2023**



Source: UK Business Counts 2023, Nomis.

Notes: Contains Ordnance Survey data Crown copyright and database rights.

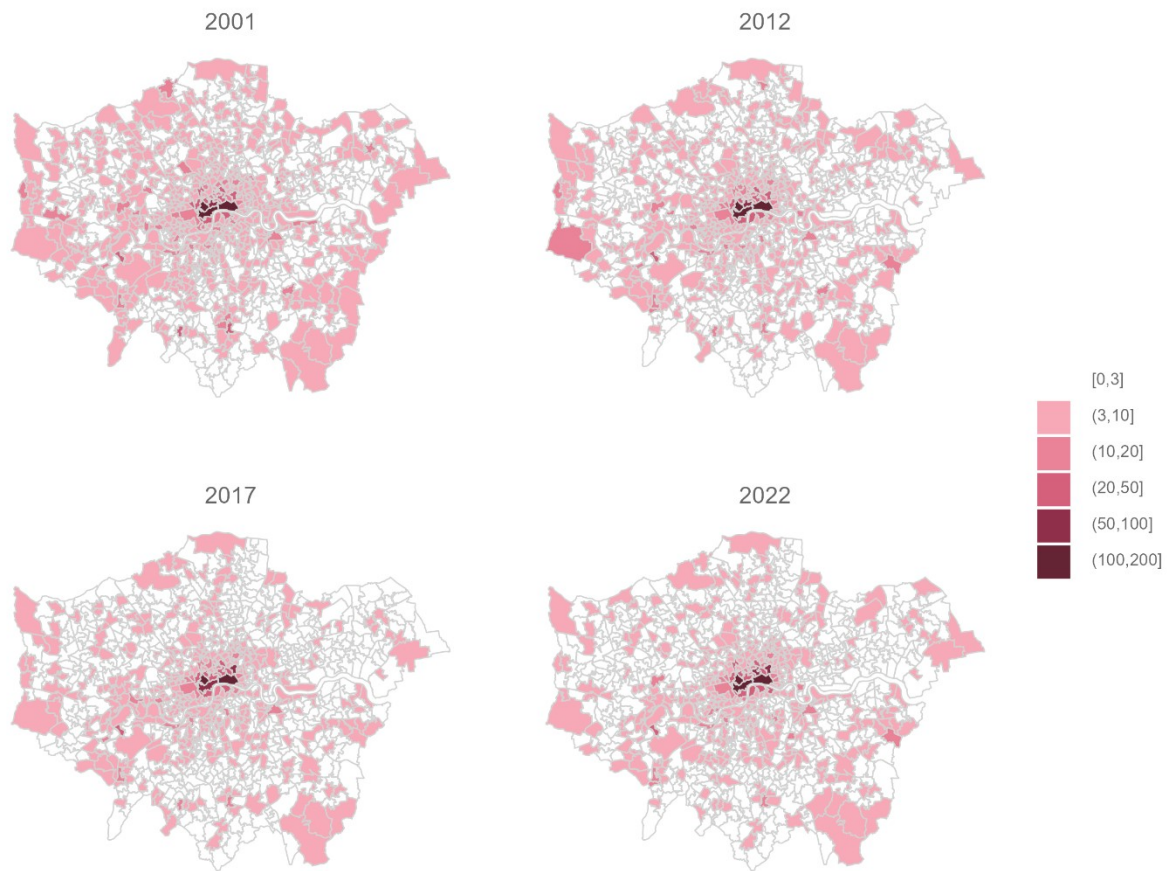
**Figure 30: Revisions to Hospitality Workforce Jobs series in London, December 2023**



Source: Workforce Jobs, September 2023 and December 2023, ONS.

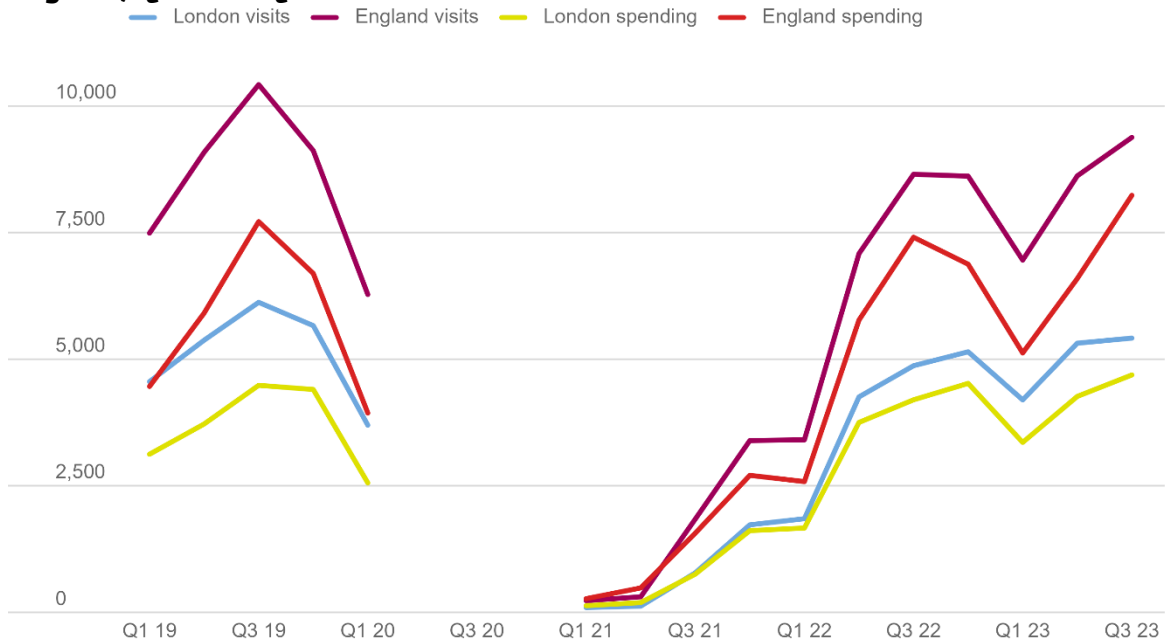
Note: Hospitality refers to UK SIC section "Accommodation and Food Service".

**Figure 31: Pubs by MSOA, 2001, 2012, 2017 and 2022**



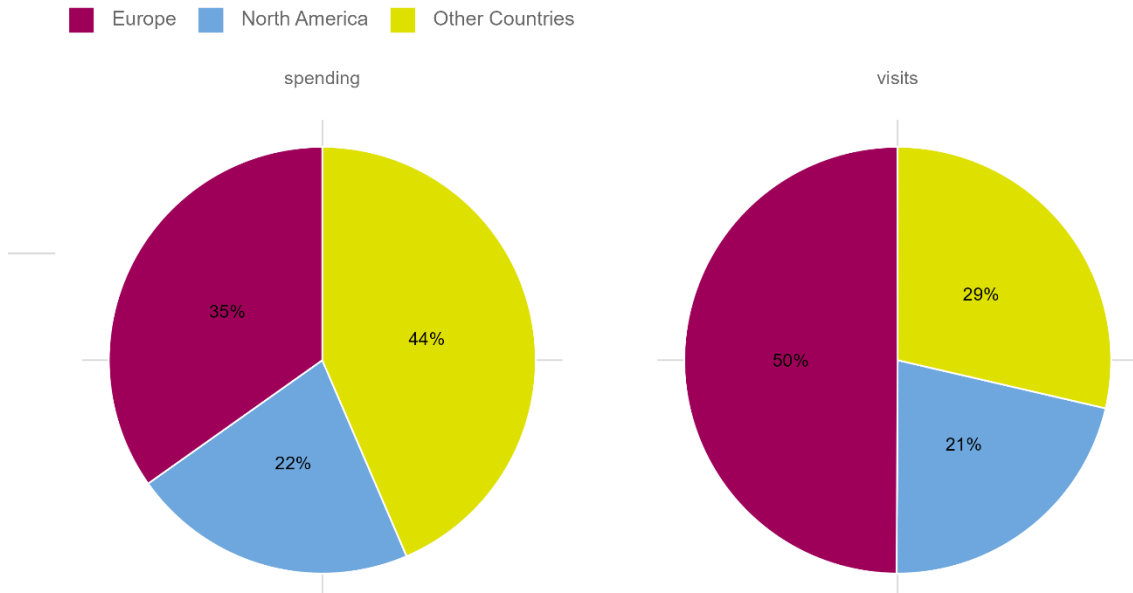
Source: ONS Inter-Departmental Business Register (2001-2022), GLA Pubs Audit, 2023.  
Notes: Contains Ordnance Survey data Crown copyright and database rights.

**Figure 32: Number of visits (thousands) to and spending (£ million) in London and England, Q1 2019-Q3 2023**



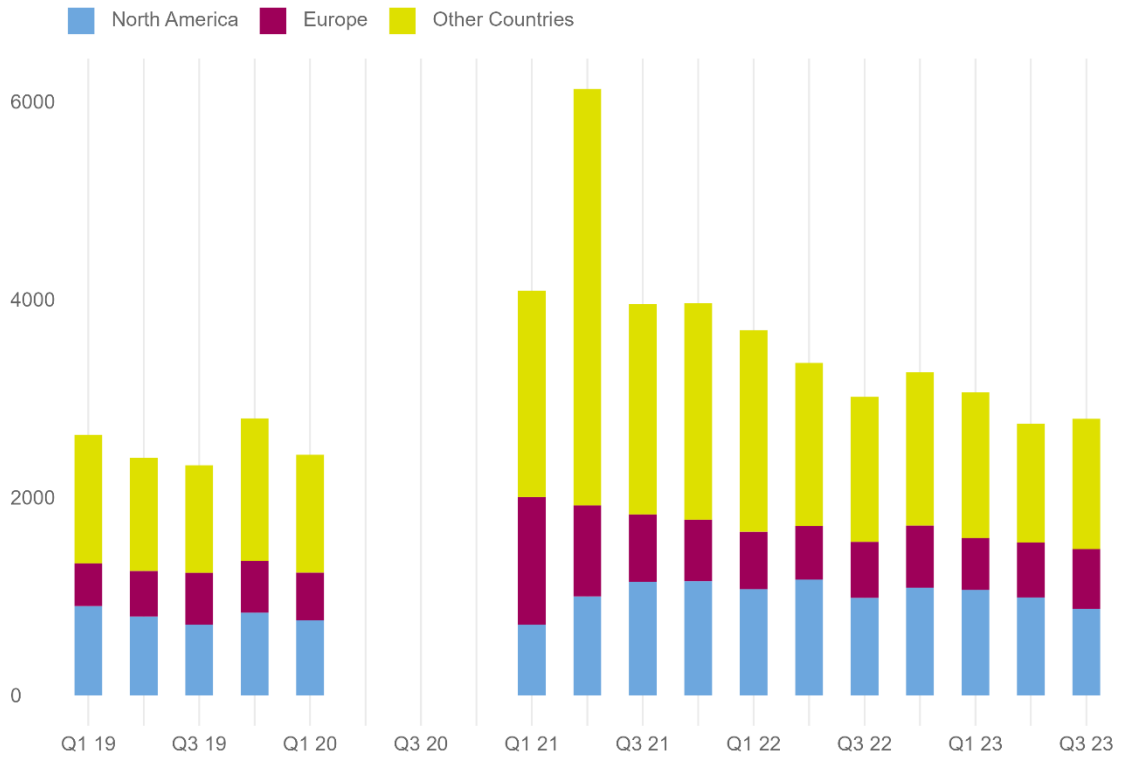
Source: Estimates of overseas residents' visits and spending in the UK Q1 2019-Q3 2023, ONS  
 Notes: Q2-Q4 2020 data is not available. Visits (thousands) & spending (£ million).

**Figure 33: Spending and visits in London, Q3 2023, by area of residence**



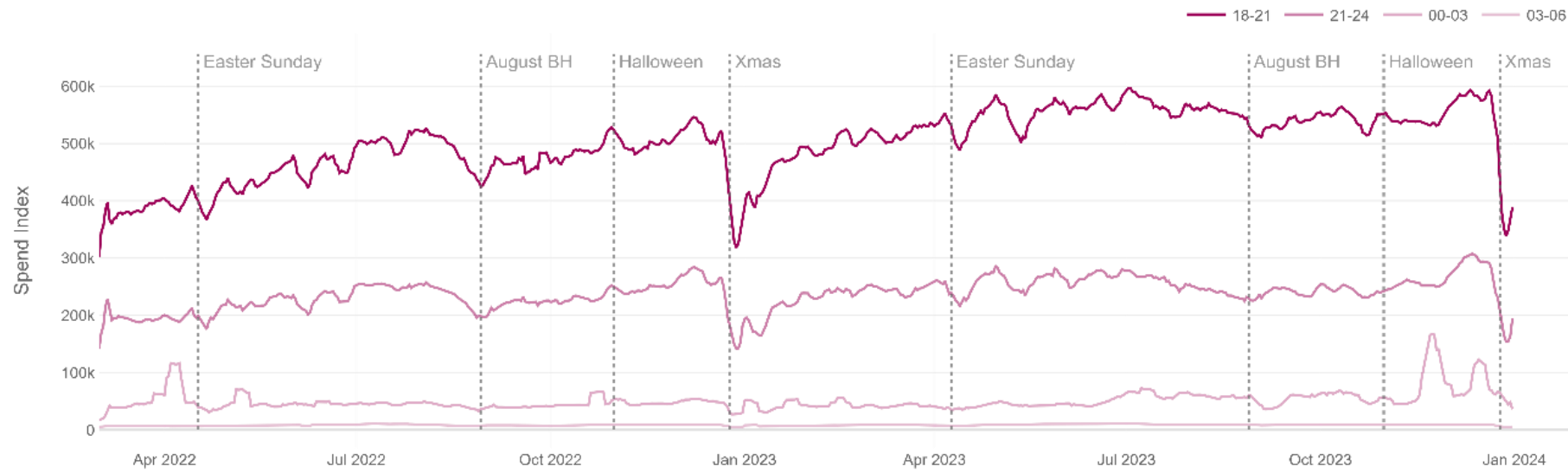
Source: Estimates of overseas residents' visits and spending in the UK Q3 2023, ONS

**Figure 34: Spending per visitor, Q1 2019-Q3 2023, by area of residence**



Source: Estimates of overseas residents' visits and spending in the UK Q1 2019-Q3 2023, ONS.  
 Notes: Q2-Q4 2020 data is not available. Spending in £, nominal.

**Figure 35: Night-time Spend Index in London, 2022-2024**

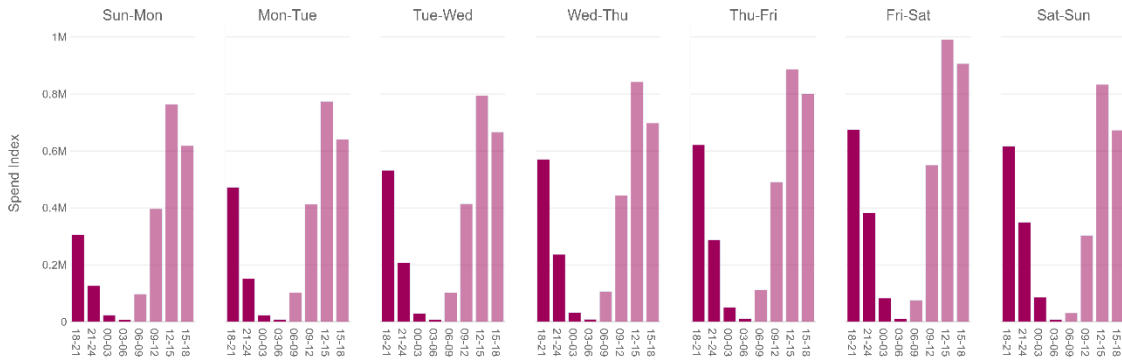


Source: Mastercard Index 2022-2024, GLA High Streets Data Service analysis

Notes: The index has been adjusted to account for inflation

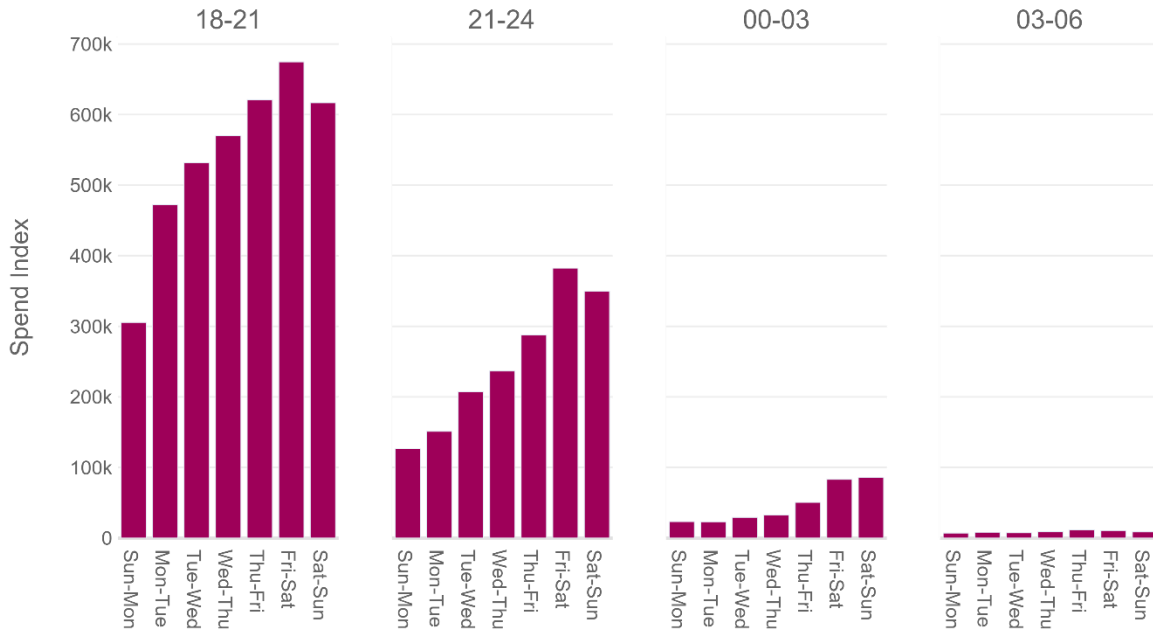


**Figure 36: Spend index in London, 2023, by day of week and night hour**



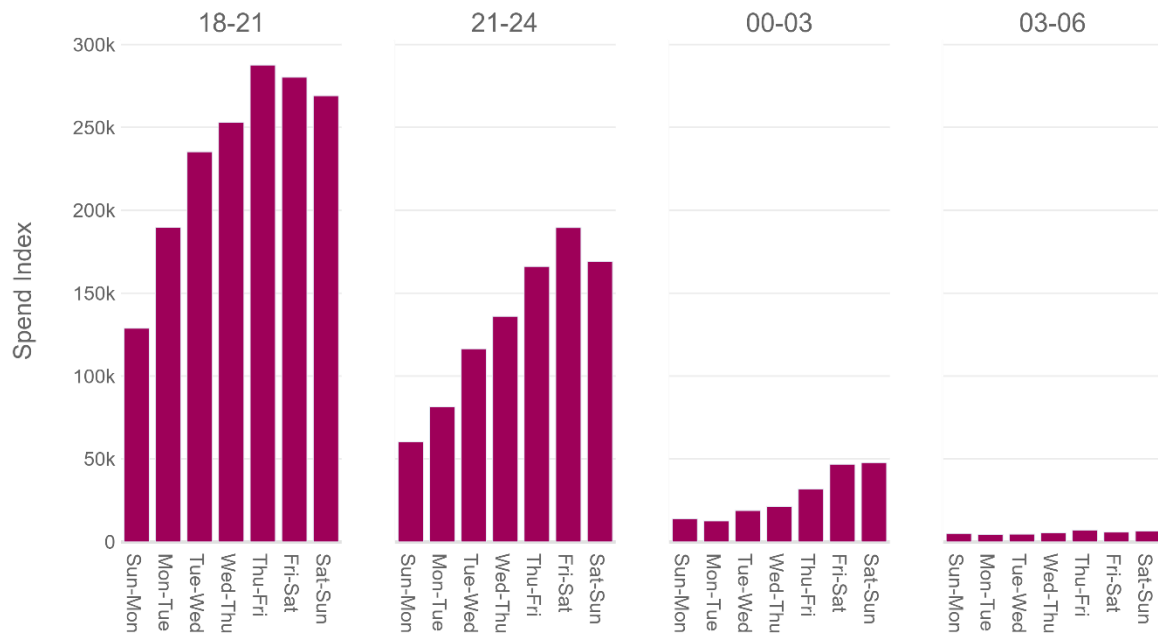
Source: Mastercard Index 2023, GLA City Data analysis  
 Notes: The index has been adjusted to account for inflation

**Figure 37: Night-time spend index in London, 2023**



Source: Mastercard Index 2023, GLA City Data analysis  
 Notes: The index has been adjusted to account for inflation

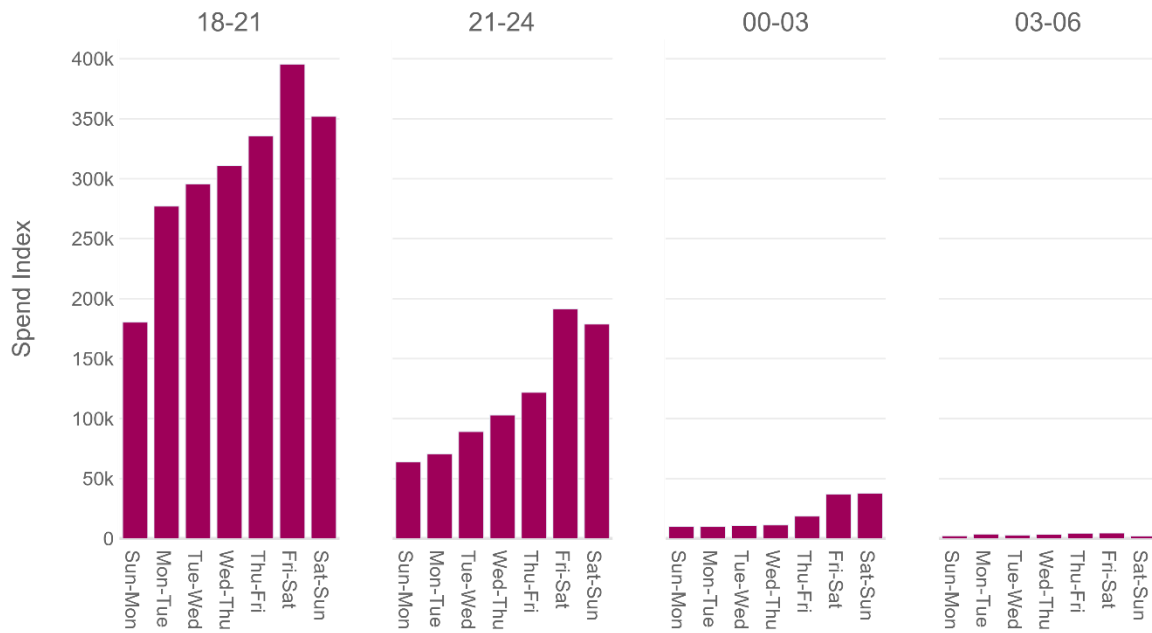
**Figure 38: Night-time spend index in CAZ, 2023**



Source: Mastercard Index 2023, GLA City Data analysis

Notes: The index has been adjusted to account for inflation

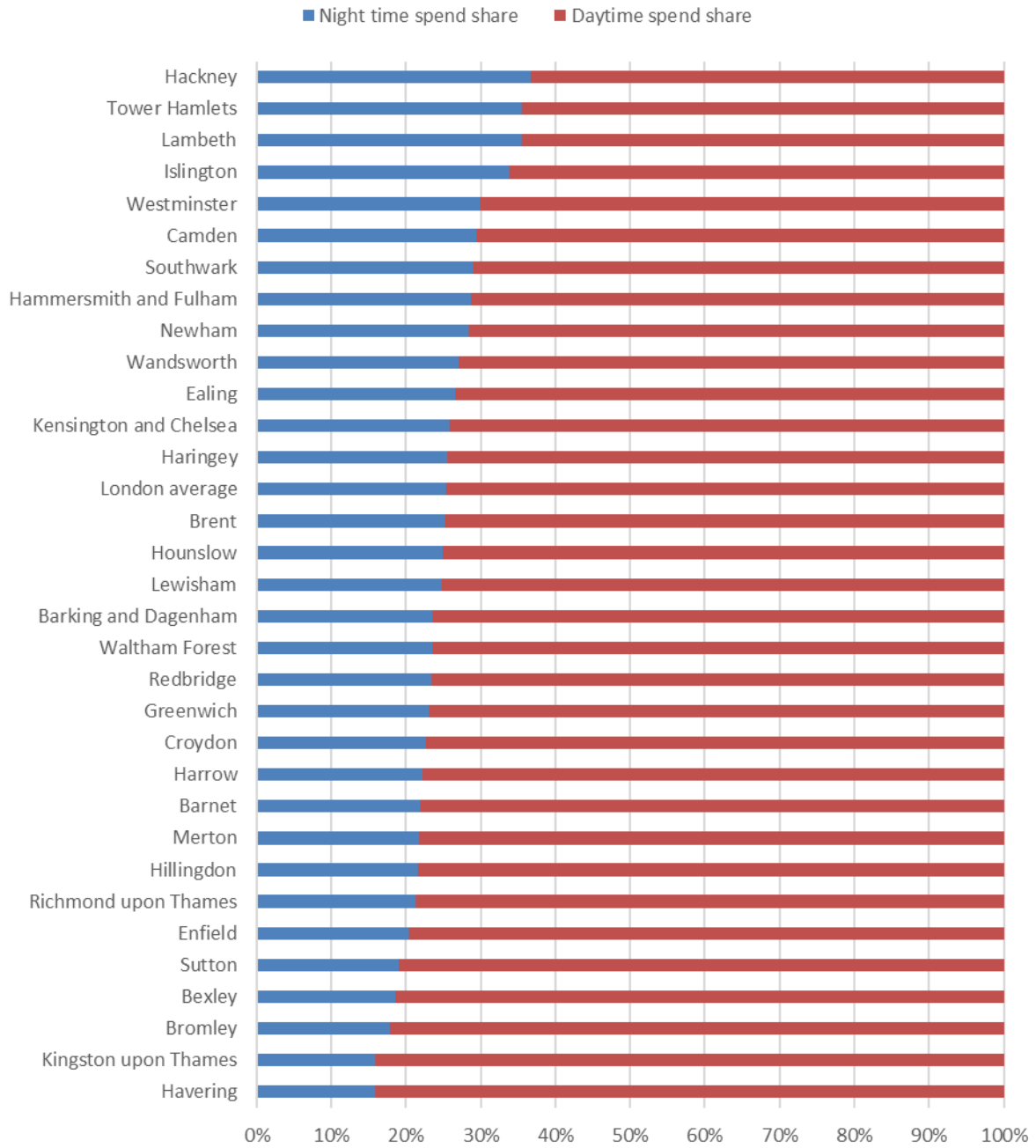
**Figure 39: Night-time spend index in non-CAZ, 2023**



Source: Mastercard Index 2023, GLA City Data analysis

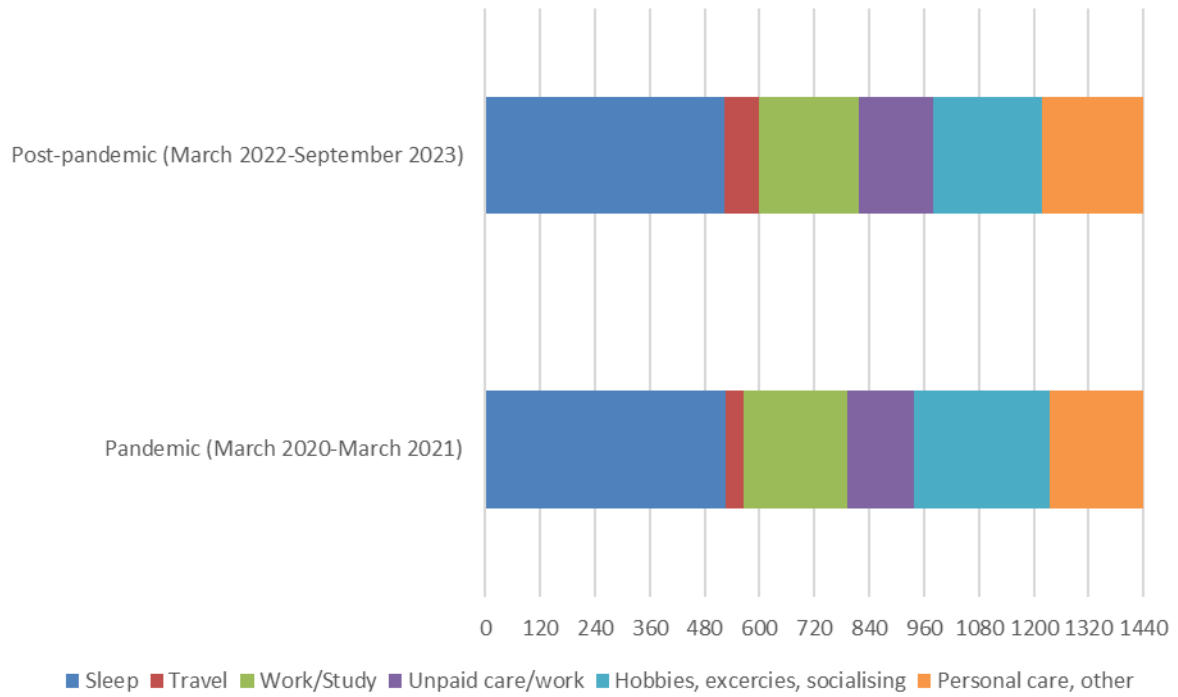
Notes: The index has been adjusted to account for inflation

**Figure 40: Spend share in London, by day and night**



Source: Mastercard Index Oct-Dec 2023, GLA High Streets Data Service analysis

**Figure 41: Time use (minutes) in activities, London, during pandemic and post-pandemic**



Source: ONS Time Use in the UK: 23 September to 1 October 2023, GLAE analysis.  
 Notes: We have averaged time use across pandemic and post-pandemic periods by category and grouped categories together.

### 3. Out-And-About In London At Night

#### Introduction

The GLA's High Streets Data Service uses BT Mobility data to show the numbers of residents, workers and visitors in London at any given time, and how this changes throughout the 24 hours of each day. In this section we use the data to show how night-time footfall has changed over the last two years and which boroughs and town centres see the most visitors from 6pm to 6am.

The data clearly shows the sheer number of people that are active in London at night. It also underlines the importance of the West End and other iconic destinations in the Central Activities Zone (CAZ) – but also provide strong evidence that town centres outside the CAZ, from Whitechapel to Wembley and from Camden Town to Clapham High Street, are also big draws for night-time activity.

The typically busiest hotspots outside the CAZ include town centres Newham, Greenwich, Hammersmith & Fulham and Camden and the top 20 locations are spread across 16 London boroughs.

#### Data and definitions

This section uses anonymous, aggregated data from BT Mobility. It classifies network users by the location of their usual activities. This allows us to see those that are resident, those that are visitors and those that are at work within a particular area. The High Streets Data Service receives data aggregated at a three-hour period using a "hex grid" that divides London into a grid of hexagons measuring 350 metres across. The data are then weighted to produce hex-by-time-by-type counts that are representative of the wider population.

Most of the analysis in the chapter reports "Typical footfall counts" that are generated by first summing all the hexes in a specific area (e.g., a borough or a town centre) for each day and time period, and then taking the median across 2023 for each for each day and time period.

At higher level areas (London and CAZ/non-CAZ), the data has been kept separate for each day/night of the week and in 3-hour time periods (18-21, 21-24, 00-03, 03-06).

At a borough level, footfall counts have been averaged across nights/time periods and grouped into:

- Sun-Weds nights 6pm-12am
- Sun-Weds nights 12am-6am
- Thu-Sat nights 6pm-12am
- Thu-Sat nights 12am-6am

In some cases, we also show relative footfall counts by borough which are calculated by comparing the night-time visitor counts with Saturday afternoon levels (12pm-6pm) for that borough. For instance, a value of 0.7 means there are on average 30% less visitors in comparison to Saturday afternoons in that borough.

There are several ways to identify hotspots using this data, each of which can rank areas according to different criteria. In this report we focus on two: ranking by typical footfall which provides evidence on the overall popularity of an area; and ranking by the average (mean) hex count within the area, which provides evidence on the density of night-time activity.

## Key findings

1. **Over 2 million visitors are out-and-about in London on a typical weekend night between 9pm and midnight**, the data show. Around 1 million are out even later, between midnight and 3pm (see Figure 42), while the early evening (6pm-9pm) typically sees 3-4 million visitors.
2. **Footfall is clearly both seasonal and volatile, and without a longer time series it is difficult to distinguish lasting trends.** However, there are signs of an increase in night-time footfall from late summer 2022 onwards, and then a large rise towards the end of the summer of 2023 through to Christmas (See Figure 43.)
3. The Central Activities Zone is a key attraction for night-time visitors: **Westminster typically sees nearly 400,000 visitors from 6pm to midnight, averaged across Thursday to Saturdays nights.** Some Outer London boroughs see just one-tenth (approximately) of that number, with Kingston-upon-Thames, Barking and Dagenham, Sutton and Bexley all seeing fewer than 40,000 visitors in that time period (See Figure 44).
4. While Westminster is the most popular borough around the clock, **some boroughs have a night-time offer that is relatively more important than their day-time offer.** To show this we compared night-time visitor footfall with footfall on a typical Saturday afternoon (the busiest time for most high streets). **On this measure, the “centres” of the economy after 6pm are Hackney, Tower Hamlets, Islington and Lambeth.** These boroughs typically have visitor numbers from 6pm to midnight on Thursdays to Saturdays that are just 24% to 32% lower than on a Saturday afternoon (See Figure 45).
5. Breaking down the data even further and looking at three-hour time slots, **Hackney is busier at night than in the day, with 4% more footfall on a Saturday evening than in the afternoon**, while Tower Hamlets comes closely behind (3% down) (See **Error! Reference source not found.**Figure 45 52).
6. Town centres are an integral part of the city at night and this data allows us to identify London’s hot spots. We do this using several different measures of activity.
7. First, **we identify the busiest town centres**, i.e., those with largest total footfall; second, **we identify the town centres with the densest activity** (so taking into account that the West End, for instance, covers a larger area than others).
8. **The West End is by far the busiest destination from 6pm to midnight**, with more than 140,000 visitors on a typical Thursday to Saturday night (See Figure 46).
9. **However, the data also highlights the importance of town centres outside the CAZ – with nine of the top 20 hotspots being outside the CAZ.** The midnight to 6am period sees a similar pattern, albeit with much lower levels of footfall across all destinations (See Figure 47).
10. Looking at the density of visitors (to do this, we take the average footfall in each hex within the town centre), the West End no longer dominates, although **destinations**

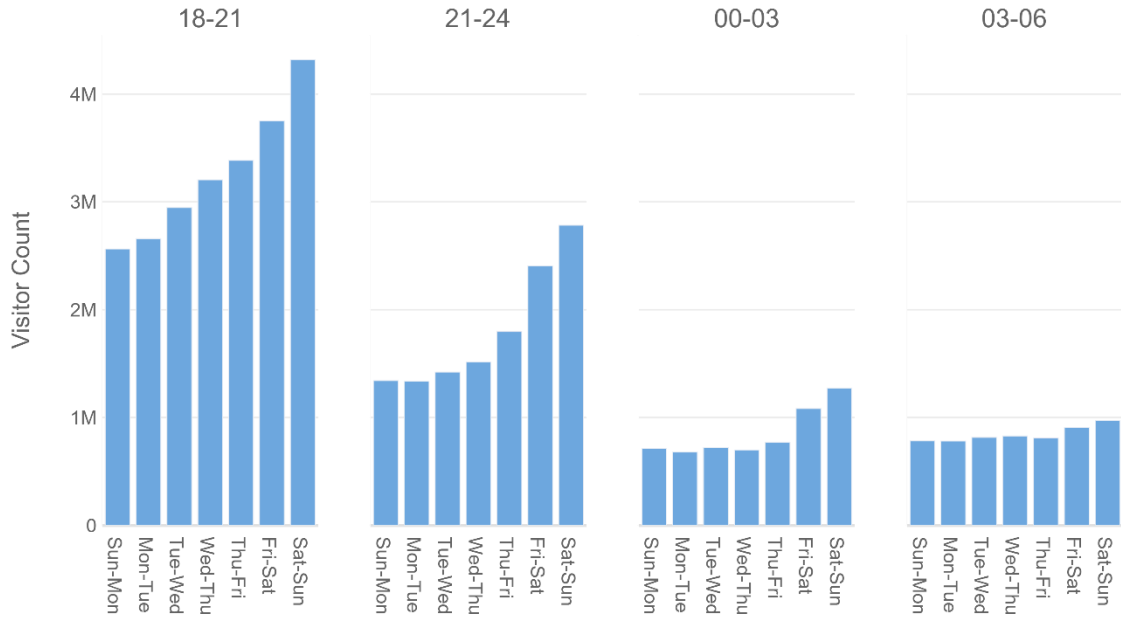


**within the City and Westminster still represent the four densest hotspots** from 6pm to midnight (See Figure 48).

11. **And highlighting the importance of travel hubs to night-time activity**, town centres around many of London's largest national rail stations are well represented in the top 20 hotspots (See Figure 49).

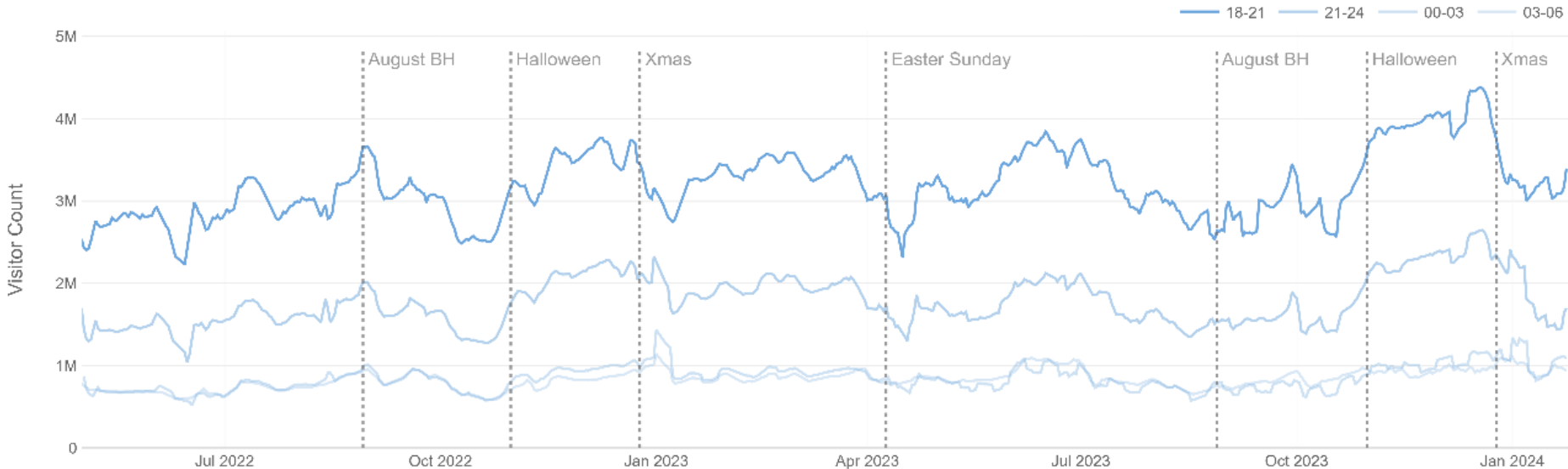
## Figures and tables for Out-And-About In London At Night

Figure 42: Night-time visitor counts in London by time of day, 2023



Source: BT Mobility footfall 2023, GLA High Streets Data Service analysis

Figure 43: Night-time visitor footfall in London, 2022-2024



Source: BT Mobility footfall 2022-2024, GLA High Streets Data Service analysis

**Figure 44: Night-time visitor footfall by borough**

time_group	12am-6am		6pm-12am	
night_group	Sun-Wed nights	Thu-Sat nights	Sun-Wed nights	Thu-Sat nights
borough_name				
Westminster	46490	64223	218081	378218
Camden	35454	46488	129532	209418
Tower Hamlets	44619	56455	122330	186088
Southwark	37375	48056	97231	149751
Lambeth	38036	53321	97007	145746
Islington	30790	40737	84947	136042
Hackney	26935	37001	72075	123385
Wandsworth	34832	42300	77615	108219
Newham	34279	41674	84404	106031
City of London	12556	17412	47607	96712
Brent	28950	34283	78692	92484
Hammersmith and Fulham	24169	27963	63780	86572
Kensington and Chelsea	19071	22923	58532	84715
Greenwich	23741	27369	63119	83542
Ealing	26324	30499	68060	81276
Haringey	22641	27617	60208	77183
Barnet	22936	26088	59804	74479
Croydon	23145	27856	56171	70451
Hillingdon	20469	24367	52911	63679
Lewisham	23456	29459	49287	63017
Enfield	19266	22943	50001	61956
Redbridge	18104	21034	52096	61367
Hounslow	19565	22065	47749	58770
Waltham Forest	19038	22276	43309	56137
Bromley	13791	16716	36993	52733
Richmond upon Thames	10997	13119	31848	46477
Harrow	12952	15185	36574	46251
Merton	13813	16212	33528	44926
Havering	10810	13636	29152	40883
Bexley	11520	13894	26120	38332
Sutton	10874	12629	25812	34967
Barking and Dagenham	12136	14184	27706	33901
Kingston upon Thames	9139	11145	23633	33285

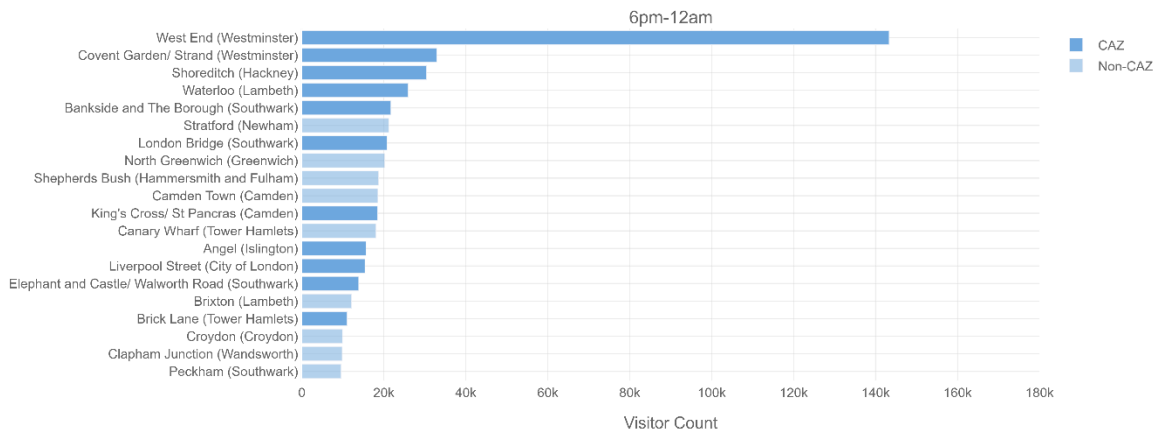
Source: BT Mobility footfall 2023, GLA High Streets Data Service analysis

**Figure 45: Night-time visitor footfall by borough, relative to Saturday 12-15 footfall**

time_group	12am-6am		6pm-12am	
night_group	Sun-Wed nights	Thu-Sat nights	Sun-Wed nights	Thu-Sat nights
borough_name				
Hackney	0.17	0.23	0.44	0.76
Tower Hamlets	0.17	0.22	0.47	0.71
Islington	0.16	0.21	0.44	0.71
Lambeth	0.18	0.25	0.45	0.68
Barking and Dagenham	0.22	0.26	0.51	0.62
City of London	0.08	0.11	0.31	0.62
Redbridge	0.18	0.21	0.52	0.62
Brent	0.19	0.22	0.51	0.60
Wandsworth	0.19	0.23	0.42	0.58
Southwark	0.15	0.19	0.38	0.58
Ealing	0.19	0.22	0.49	0.58
Lewisham	0.21	0.27	0.45	0.57
Harrow	0.16	0.18	0.44	0.56
Hillingdon	0.18	0.21	0.46	0.55
Haringey	0.16	0.20	0.43	0.55
Greenwich	0.16	0.18	0.42	0.55
Newham	0.18	0.21	0.44	0.55
Camden	0.09	0.12	0.34	0.55
Waltham Forest	0.18	0.21	0.40	0.52
Hammersmith and Fulham	0.14	0.17	0.38	0.52
Bexley	0.15	0.18	0.35	0.51
Enfield	0.16	0.19	0.41	0.51
Westminster	0.06	0.08	0.29	0.50
Merton	0.15	0.18	0.37	0.49
Hounslow	0.16	0.19	0.40	0.49
Croydon	0.16	0.19	0.39	0.49
Barnet	0.15	0.17	0.39	0.48
Sutton	0.14	0.16	0.33	0.45
Havering	0.12	0.15	0.32	0.45
Bromley	0.11	0.13	0.29	0.41
Kensington and Chelsea	0.09	0.10	0.26	0.38
Kingston upon Thames	0.10	0.13	0.27	0.37
Richmond upon Thames	0.08	0.10	0.24	0.35

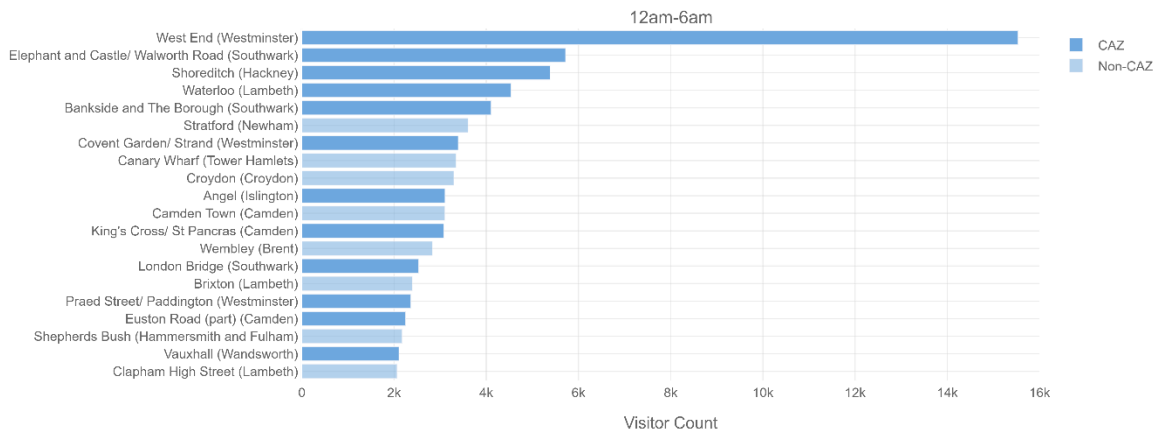
Source: BT Mobility footfall 2023, GLA High Streets Data Service analysis Notes: Night-time footfall here is relative to Saturday day-time levels for each borough

**Figure 46: Night-time visitor hotspots across London, Thursday to Saturday, 6pm-12am**



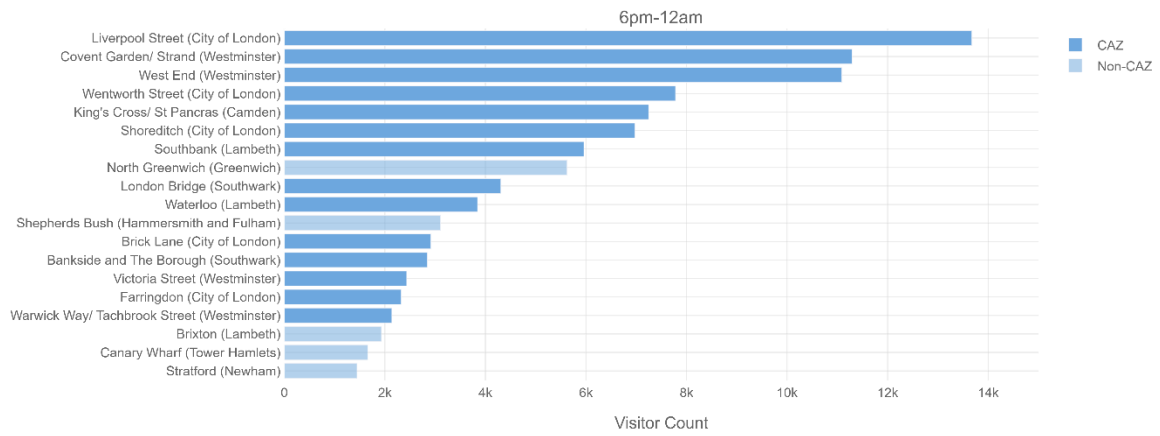
Source: BT Mobility footfall 2023, GLA High Streets Data Service analysis

**Figure 47: Night-time visitor hotspots across London, Thursday to Saturday, 12am-6am**



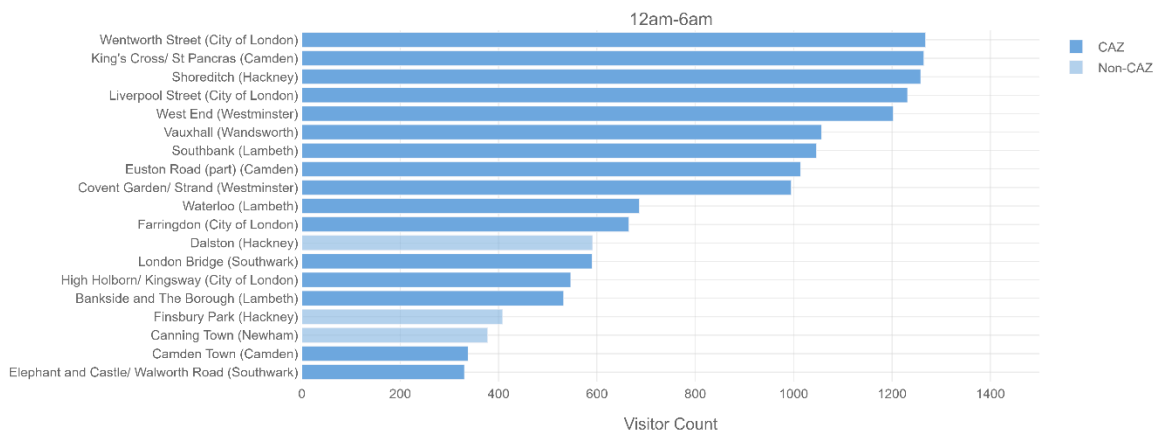
Source: BT Mobility footfall 2023, GLA High Streets Data Service analysis

**Figure 48: Density hotspots of night-time visitors (per 350m hex), Thursday to Saturday, 6pm-12am**



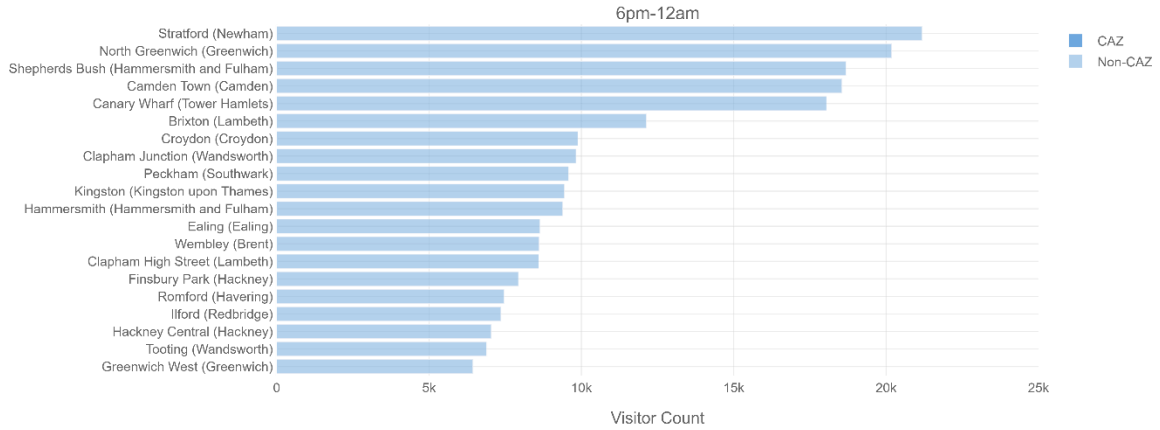
Source: BT Mobility footfall 2023, GLA High Streets Data Service analysis

**Figure 49: Density hotspots of night-time visitors (per 350m hex) across London, Thursday to Saturday, 12am-6am**



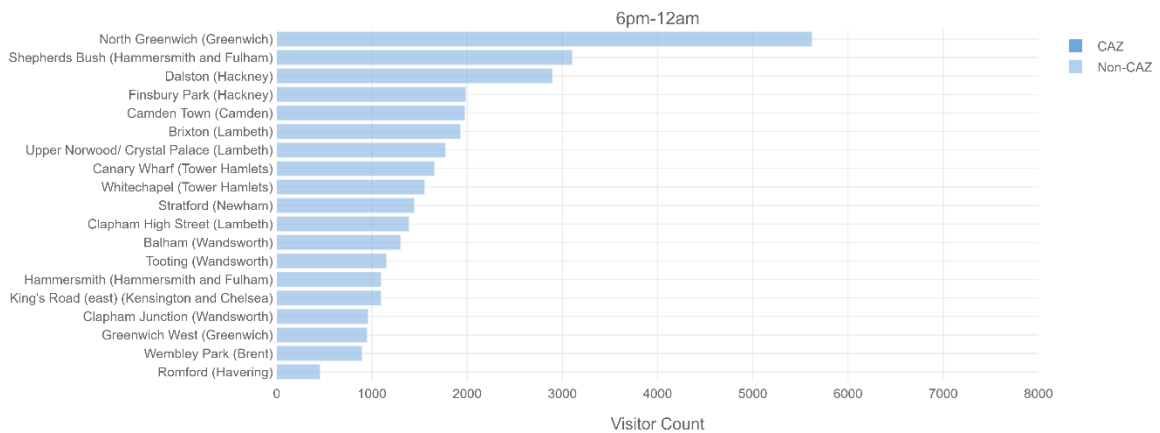
Source: BT Mobility footfall 2023, GLA High Streets Data Service analysis

**Figure 50: Night-time visitor' hotspots across non-CAZ London, Thursday to Saturday, 6pm-12am**



Source: BT Mobility footfall 2023, GLA High Streets Data Service analysis

**Figure 51: Density hotspots of night-time visitors (per 350m hex) across non-CAZ London, Thursday to Saturday, 6pm-12am**



Source: BT Mobility footfall 2023, GLA High Streets Data Service analysis



**Figure 52: Night-time visitor footfall by borough relative to Saturday 12-15 footfall, by 3-hour period**

borough_name	18-21				21-24				00-03			
	Mon-Tue	Thu-Fri	Fri-Sat	Sat-Sun	Mon-Tue	Thu-Fri	Fri-Sat	Sat-Sun	Mon-Tue	Thu-Fri	Fri-Sat	Sat-Sun
Hackney	0.51	0.74	0.85	1.04	0.29	0.44	0.72	0.90	0.16	0.20	0.38	0.46
Tower Hamlets	0.56	0.80	0.84	0.97	0.32	0.44	0.61	0.70	0.16	0.19	0.27	0.31
Lambeth	0.56	0.70	0.78	0.88	0.30	0.40	0.58	0.70	0.17	0.19	0.31	0.39
Islington	0.54	0.81	0.83	0.87	0.27	0.42	0.57	0.64	0.15	0.18	0.27	0.31
Brent	0.57	0.61	0.74	0.85	0.32	0.34	0.49	0.58	0.18	0.19	0.25	0.30
Redbridge	0.59	0.62	0.73	0.81	0.32	0.34	0.48	0.54	0.17	0.17	0.23	0.27
Barking and Dagenham	0.59	0.64	0.73	0.80	0.32	0.35	0.49	0.56	0.19	0.20	0.27	0.31
Southwark	0.46	0.65	0.70	0.79	0.24	0.35	0.50	0.55	0.13	0.15	0.23	0.24
Greenwich	0.48	0.58	0.70	0.79	0.26	0.31	0.43	0.53	0.14	0.15	0.19	0.22
Wandsworth	0.51	0.58	0.69	0.79	0.27	0.34	0.48	0.56	0.16	0.18	0.24	0.28
Newham	0.53	0.58	0.67	0.78	0.30	0.32	0.43	0.51	0.16	0.17	0.24	0.28
Harrow	0.54	0.58	0.70	0.77	0.27	0.29	0.44	0.49	0.14	0.15	0.20	0.23
Hammersmith and Fulham	0.49	0.58	0.66	0.76	0.24	0.30	0.42	0.45	0.14	0.15	0.19	0.21
City of London	0.45	1.05	0.76	0.76	0.16	0.45	0.47	0.51	0.06	0.10	0.14	0.17
Ealing	0.56	0.61	0.70	0.75	0.30	0.34	0.46	0.52	0.17	0.18	0.23	0.28
Hillingdon	0.61	0.67	0.74	0.75	0.26	0.30	0.38	0.41	0.12	0.13	0.16	0.19
Camden	0.44	0.65	0.69	0.74	0.18	0.30	0.41	0.46	0.08	0.11	0.16	0.19
Haringey	0.49	0.54	0.66	0.74	0.28	0.33	0.45	0.53	0.15	0.16	0.23	0.27
Westminster	0.38	0.60	0.63	0.73	0.16	0.28	0.37	0.43	0.06	0.09	0.12	0.15
Lewisham	0.51	0.56	0.67	0.71	0.30	0.34	0.47	0.53	0.19	0.20	0.30	0.34
Hounslow	0.50	0.54	0.62	0.68	0.26	0.28	0.38	0.42	0.14	0.15	0.19	0.21
Waltham Forest	0.48	0.53	0.64	0.68	0.27	0.30	0.41	0.46	0.16	0.17	0.22	0.25
Barnet	0.52	0.57	0.63	0.66	0.26	0.29	0.36	0.41	0.13	0.14	0.17	0.21
Croydon	0.47	0.53	0.62	0.65	0.25	0.26	0.37	0.41	0.14	0.15	0.20	0.24
Bexley	0.43	0.53	0.62	0.65	0.20	0.25	0.38	0.43	0.12	0.13	0.19	0.22
Enfield	0.49	0.53	0.61	0.64	0.25	0.28	0.38	0.41	0.13	0.14	0.19	0.22
Merton	0.46	0.54	0.62	0.64	0.22	0.27	0.36	0.41	0.12	0.13	0.18	0.21
Havering	0.38	0.45	0.56	0.62	0.17	0.20	0.33	0.38	0.09	0.10	0.16	0.19
Sutton	0.45	0.51	0.59	0.60	0.20	0.23	0.31	0.36	0.11	0.12	0.16	0.18
Kensington and Chelsea	0.32	0.42	0.49	0.56	0.14	0.20	0.27	0.30	0.08	0.09	0.11	0.13
Bromley	0.36	0.44	0.52	0.54	0.15	0.19	0.30	0.34	0.08	0.09	0.13	0.16
Richmond upon Thames	0.30	0.37	0.45	0.52	0.13	0.16	0.25	0.27	0.06	0.07	0.10	0.11
Kingston upon Thames	0.34	0.42	0.48	0.48	0.15	0.18	0.27	0.29	0.08	0.09	0.13	0.15

Source: BT Mobility footfall 2023, GLA city data analysis

## 4. Late Night Travel Demand Survey

### Introduction

The pandemic has had a considerable effect on travel in London, with TfL road, underground and bus services all seeing less demand at the end of 2023 compared to the pre-pandemic period (see Figure 53). We have less data available on the overall change in travel patterns at night, although measured underground station entries appear to have fallen less at night than they have in the day. In October 2023, for instance, the Friday early morning peak between 7.30am and 9.30am was around 40% lower than the equivalent week in 2019, the evening peak (between 5pm and 6.30pm) was around 25% lower, while the late evening (10pm-12am) saw a decline of less than 10% (See Figure 54).

To better understand patterns of night travel in London — and how they have changed since the pre-pandemic period — TfL and GLA carried out a follow-up survey to the January 2020 Late Night Travel Survey (see [Definitions and Data](#), below). YouGov surveyed 1,074 Londoners in January 2024 and the responding sample was weighted to be representative of all Londoners aged 18 and over.

One third of Londoners travel at night (defined as between 11pm and 5am) at least once a month, with a significant minority (10%) doing so at least three times a week.

The findings also show – perhaps surprisingly – that late night travel in London has returned to pre-pandemic patterns in terms of mode share, trip purpose and perception of the main barriers to using public transport at night.

Understanding barriers to late night travel is crucial for developing targeted interventions to improve safety perceptions and encourage greater late night public transport use. Addressing safety concerns, enhancing lighting at transport hubs, and implementing targeted security measures can contribute to creating a more inclusive and secure late night travel environment for all.

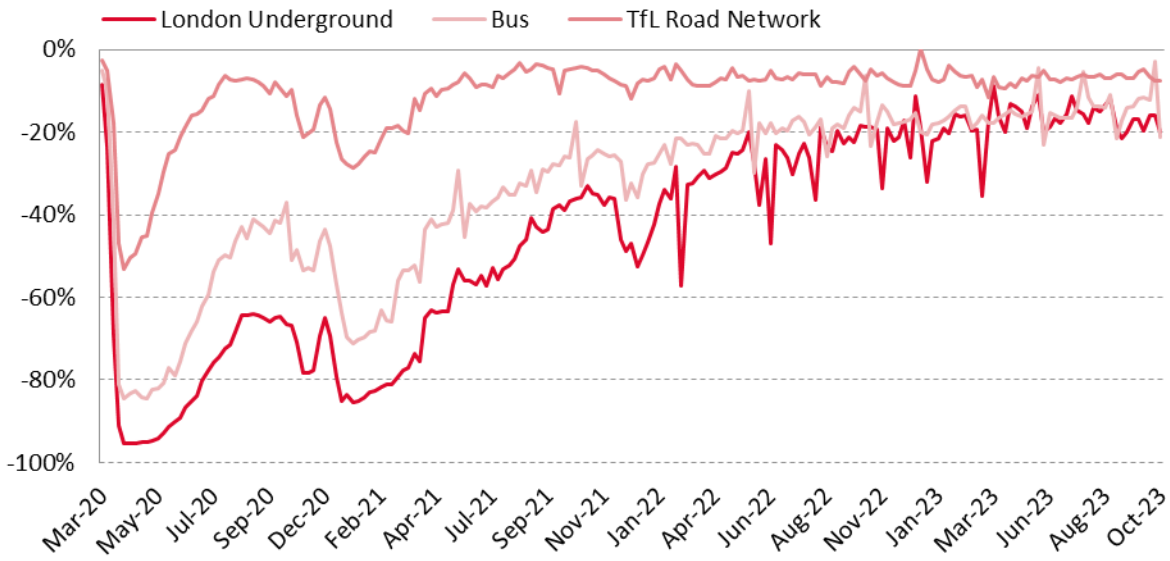
### Definitions and Data

TfL and GLA carried out a follow-up survey to the January 2020 Late Night Travel Survey. **YouGov surveyed 1,074 Londoners in January 2024** and the responding sample was weighted to be representative of all Londoners aged 18 and over.

The survey aimed to gain insights into the late-night travel habits of Londoners, including their preferred modes of transportation, the reasons for travel, obstacles faced during travel, and aspects they wish to see enhanced.

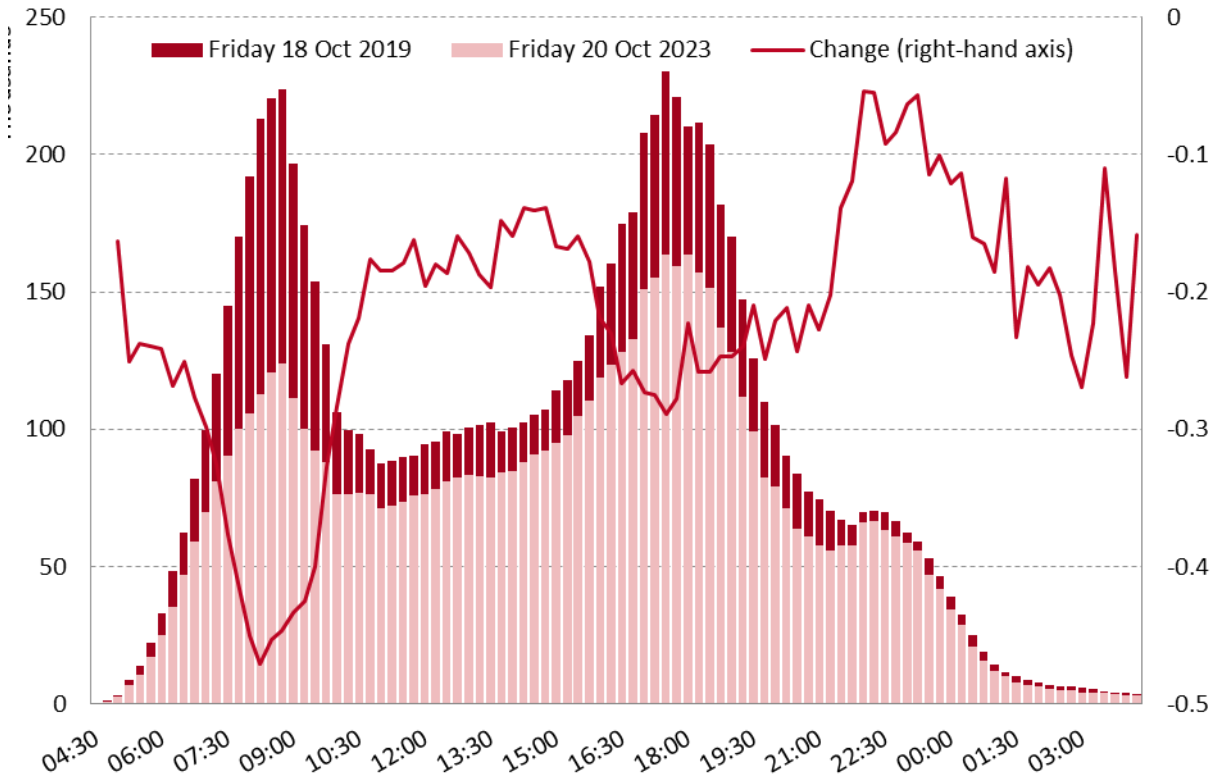
**In this survey, the late night is defined as between 11pm and 5am.**

**Figure 53: Average weekly demand on the main transport networks compared to the equivalent week before the pandemic, Mar 2020–Oct 2023**



Source: *Travel in London 2023*, Transport for London.  
 Notes: Equivalent week pre-pandemic is 1919.

**Figure 54: London Underground station entries (thousands) by 15-minute period in 2019 and 2023**



Source: *Travel in London 2023*, Transport for London.

## Key findings

1. **Around 1 in 3 Londoners travel late at night at least once a month.** (See Figure 55.) Just over half (53%) of those travelling at night are predominantly travelling for leisure purposes, around 22% to visit friends and family, and 19% to work (See Figure 56.)
2. However, workers are more frequent late-night travellers than those travelling for leisure or those visiting friends and family. **Half of those travelling for work do so at least three days a week.** (See Figure 57.)
3. **Around one in five Londoners travel at night at least once a week**, and one in 10 do so more than three days a week (See Figure 55).
4. **These figures show very little change since TfL's last survey in January 2020** (pre-pandemic) (See Figure 57).
5. **Women are less likely to travel at night, with 37% never doing so, compared to 30% of men** (See Figure 58).
6. **Young people are much more likely to travel at night**, with 30% of 18-24 year-olds travelling at least once a week, compared to 24% of 25-49 year-olds and 13% of 50-64 year olds and those 65 or older (See Figure 59).
7. **All age groups are more likely to use public transport when travelling at night.** Perhaps unsurprisingly, the 18-24 group are most likely to use active travel and the 50-64 group the most likely to use private transport (See Figure 60).
8. **Late night travel modes have changed little since the 2020 survey.** While usage of the London Underground and buses has remained relatively stable at around 52% and 48%, respectively, the London Overground and Elizabeth Line<sup>11</sup> have experienced increases, rising from 15% to 19% and 5% to 10%, respectively. Noteworthy changes include a rise in bicycle usage, including e-bikes, from 4% to 7%, and a substantial increase in private car usage, jumping from 23% to 31%.<sup>12</sup> (See Figure 61).
9. **Looking at longer journeys, public transport is by far the most preferred mode of travel**, with two-thirds (67%) of late night travellers usually taking the underground (29%), bus (16%) and national rail (10%) with the overground, Elizabeth line and DLR together contributing 8%. Private transport takes 28% (See Figure 62).
10. **Night workers combine different modes of transport to travel to and from work.** London Buses (45%), London Underground (35%) and Private car (25%) are the most common modes used by night workers (See Figure 63).
11. **The London Underground (62%) and London buses (54%)** are the most common modes used by Londoners travelling for leisure or visiting friends and family late at night (See Figure 64).
12. **Late night car or taxi travel is motivated by various factors.** Safety and security hold the highest importance for 40% of individuals, followed by the absence of practical alternatives like

<sup>11</sup> In 2020, the survey question referred to the sections then open – the Liverpool Street to Shenfield and Paddington to Heathrow sections.

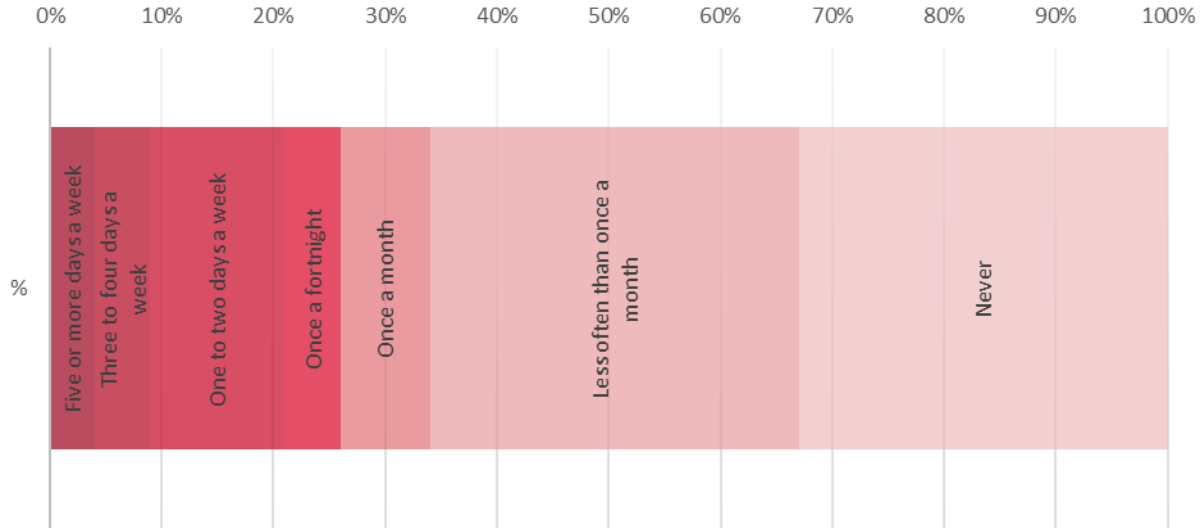
<sup>12</sup> Changes in Black Cab/Taxi/Minicab usage might be affected by changes in the specific question asked in 2020 and 2024.

public transport at 30%. Flexibility is a significant factor for 25%, while personal choice and journey time reliability are cited by 22% and 15%, respectively. Other reasons include long journey (12%), short journey (6%), health reasons (6%), and cost-effectiveness compared to alternatives (9%) (See Figure 65).

13. **The most significant barriers to using public transport late at night are concerns related to safety and security**, with 43% expressing fear of crime while getting to and waiting for public transport and 41% during the journey. Additionally, 38% are worried about the anti-social behaviour of others. Public transport availability and connectivity, along with frequency and reliability, are also considerable issues, each accounting for 27% and 33%, respectively (See Figure 66).
14. **The morning peak times, late morning, and early afternoon are generally considered very or fairly safe**, with percentages ranging from 81% to 87% feeling safe. Evening peak times are also relatively safe, with 75% feeling secure. However, early at night elicits mixed perceptions, with only 45% considering it safe and 27% feeling unsafe. Late at night is perceived as the least safe, with a significant 64% feeling very or fairly unsafe, while only 15% feel safe during this time (See Figure 67).
15. **The highest priority for functional improvement, with 46%, is the frequency of public transport services**, emphasising the importance of having more regular late night transport options. Other key priorities include the availability of public transport services during weekends (28%) and weekdays (25%), indicating a desire for consistent service throughout the week. Additionally, walking safety and paths are a significant concern, with 33%, highlighting the importance of safe pedestrian infrastructure. The convenience of the nearest stop/station (21%), the range of destinations accessible by public transport (23%), and the length of time for journeys (16%) also feature prominently, underscoring the need for accessible, efficient, and varied transportation options during late night hours. Cycling safety and infrastructure (6%) appear to be a lower priority in comparison (See Figure 68).

## Figures and tables for Late Night Travel Survey

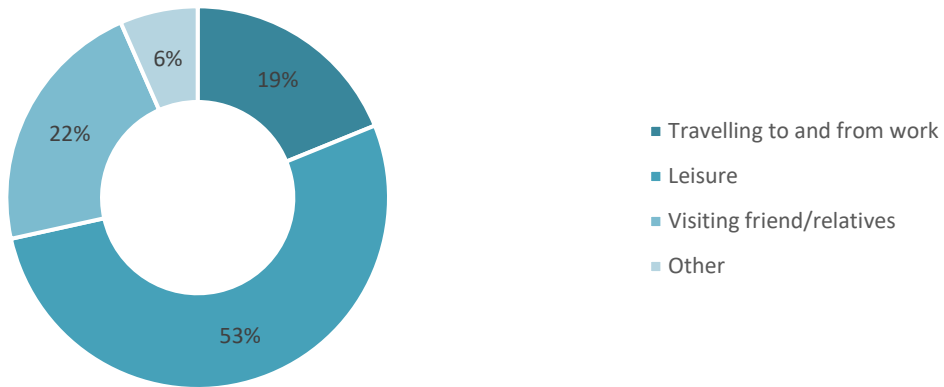
**Figure 55:** Frequency of travel late at night, Jan 2024



Source: YouGov Late night travel survey Jan 2024, TfL analysis

Notes: Survey question was ‘How often travel late at night/early morning in London?’ Numbers may not sum due to rounding.

**Figure 56:** Journey purposes of late night travel in London, Jan 2024

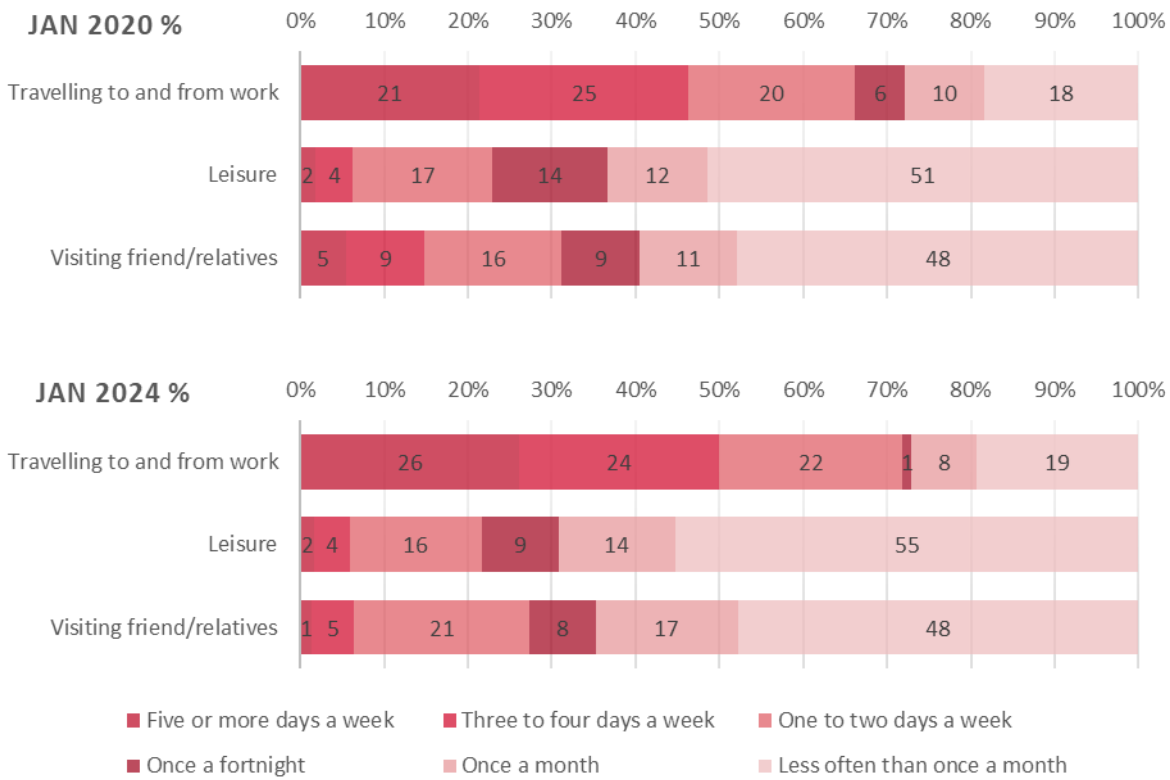


Source:

YouGov Late night travel survey Jan 2024, TfL analysis

Notes: Survey question was ‘What is the main purpose of your late at night/early morning travel in London?’ Numbers may not sum due to rounding.

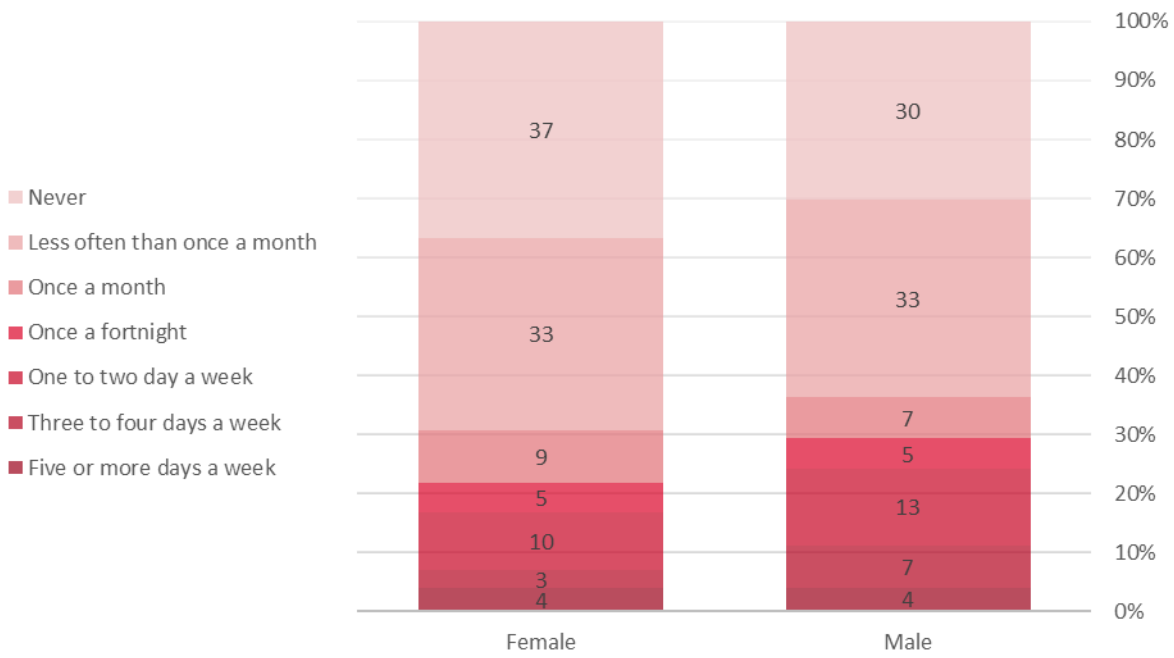
**Figure 57:** Frequency of travel late at night, Jan 2020 and 2024, by journey purpose



Source: YouGov late night travel survey Jan 2020 and Jan 2024, TfL analysis

Notes: Survey question was 'How often travel late at night/early morning in London?' Numbers may not sum due to rounding.

**Figure 58:** Frequency of travel late at night in London, Jan 2024, by gender

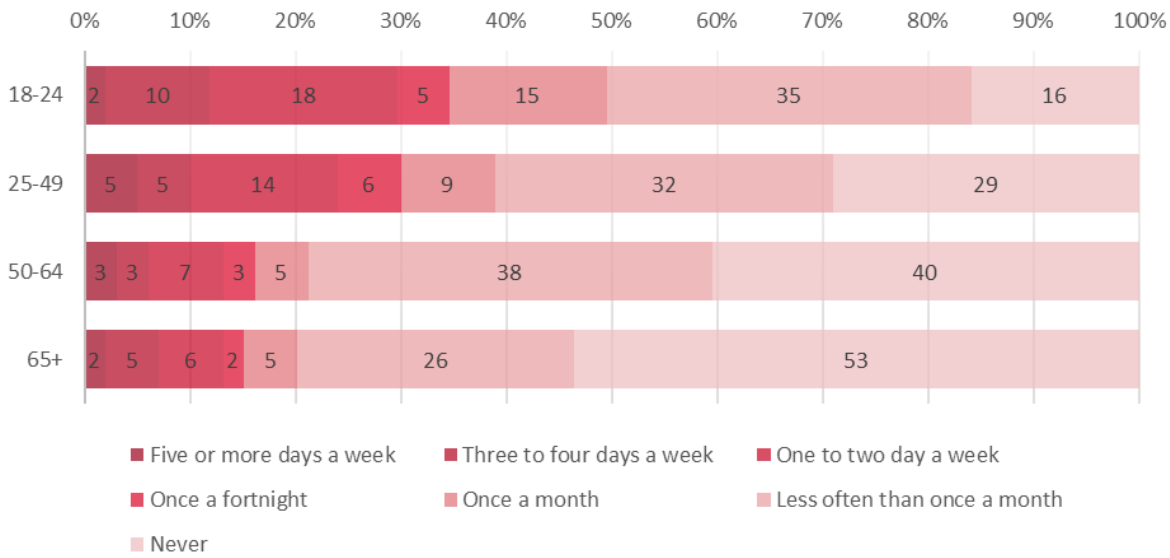


Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was ‘How often travel late at night/early morning in London?’ Numbers may not sum due to rounding.



**Figure 59:** Frequency of travel late at night in London, Jan 2024, by age group



Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was ‘How often travel late at night/early morning in London?’ Numbers may not sum due to rounding.

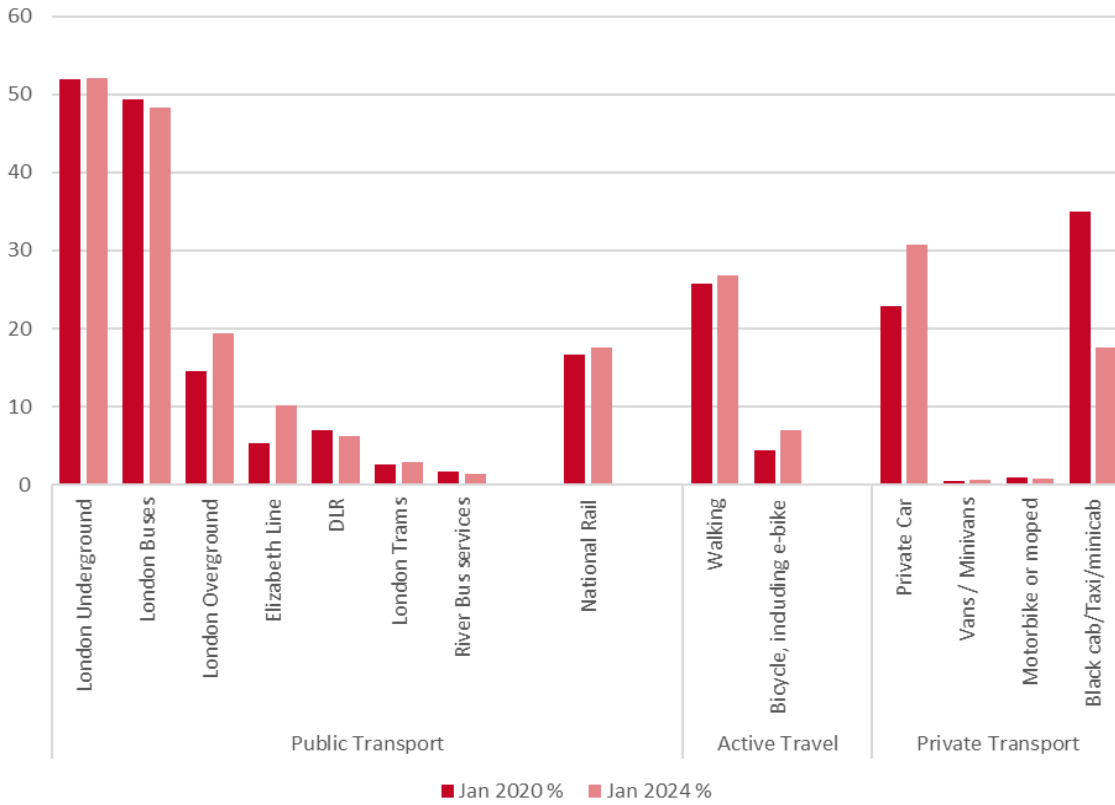
**Figure 60:** Type of transport used to travel late at night in London, Jan 2024, by age



Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was ‘Which of the following types of transport do you use to get around London late at night / early in the morning?’

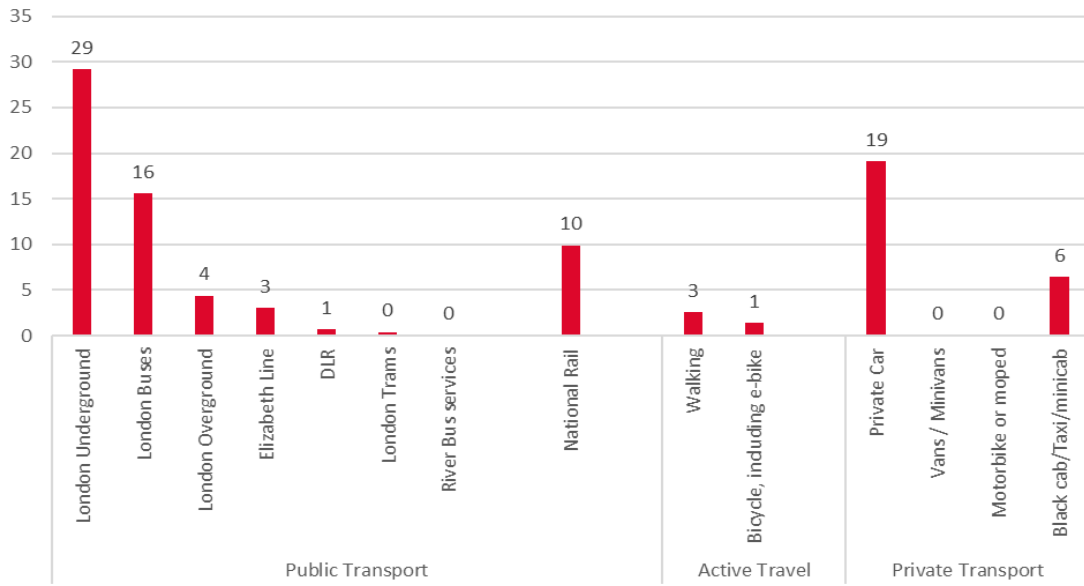
**Figure 61:** Main modes of late night travel in London, Jan 2020 and 2024



Source: YouGov late night travel survey Jan 2020 and Jan 2024, TfL analysis

Notes: Survey question was 'Which of the following types of transport do you use to get around London late at night / early in the morning?'

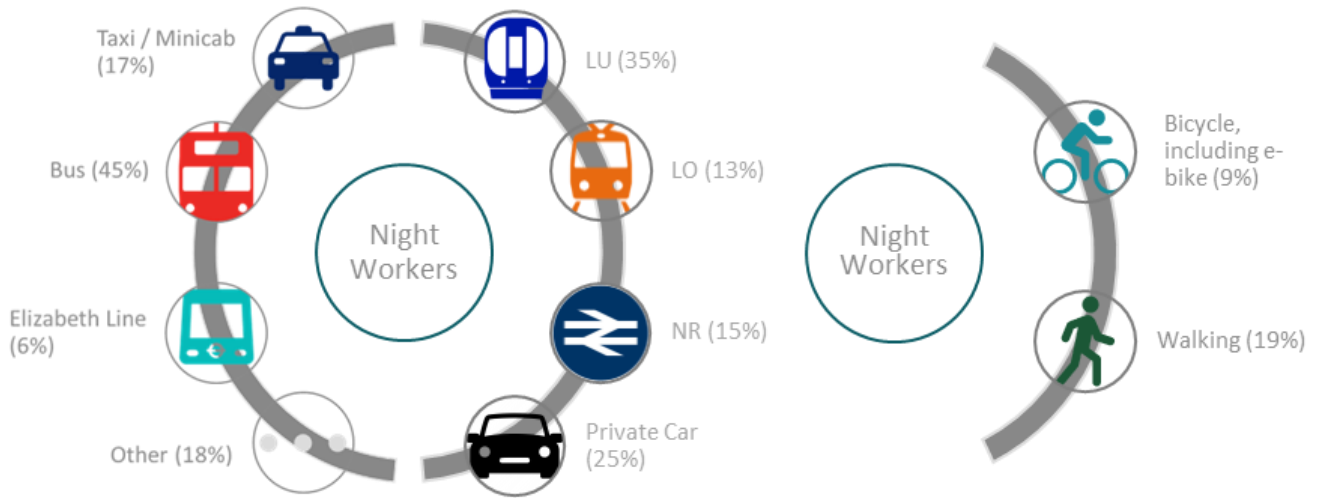
**Figure 62: Modes used for the longest distance for late night travel in London, Jan 2024**



Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was ‘You previously said you used the following types of transport to get around London late at night / early in the morning. Which of these is usually for the longest distance?’ Numbers may not sum due to rounding.

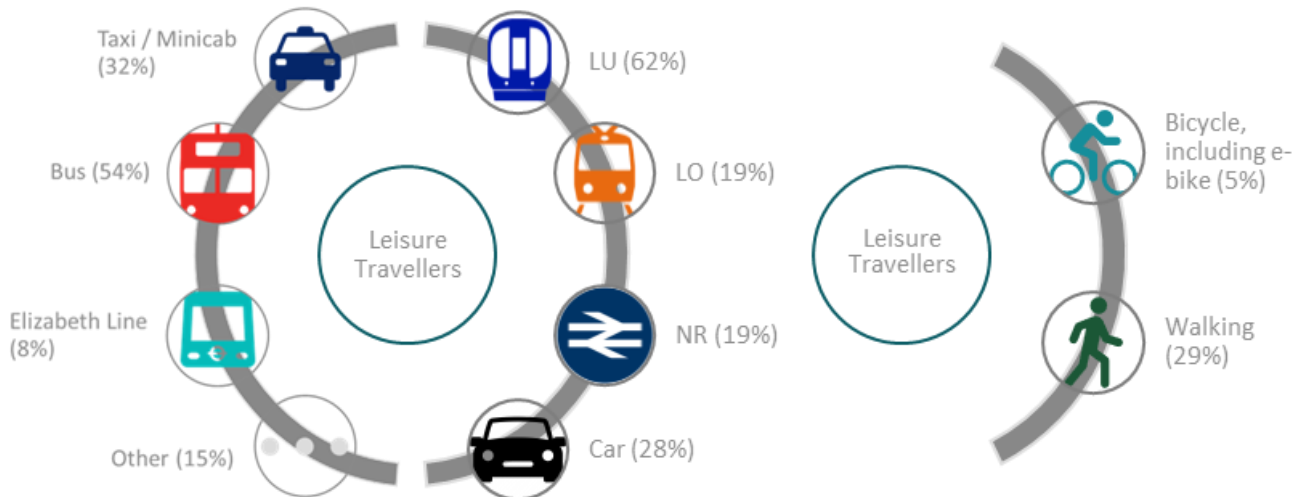
**Figure 63: Modes used by night workers to travel to and from work in London, Jan 2024**



Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was 'Which combined of the following types of transport do you use to get around London late at night / early in the morning?' (All those who travel for to and from work)

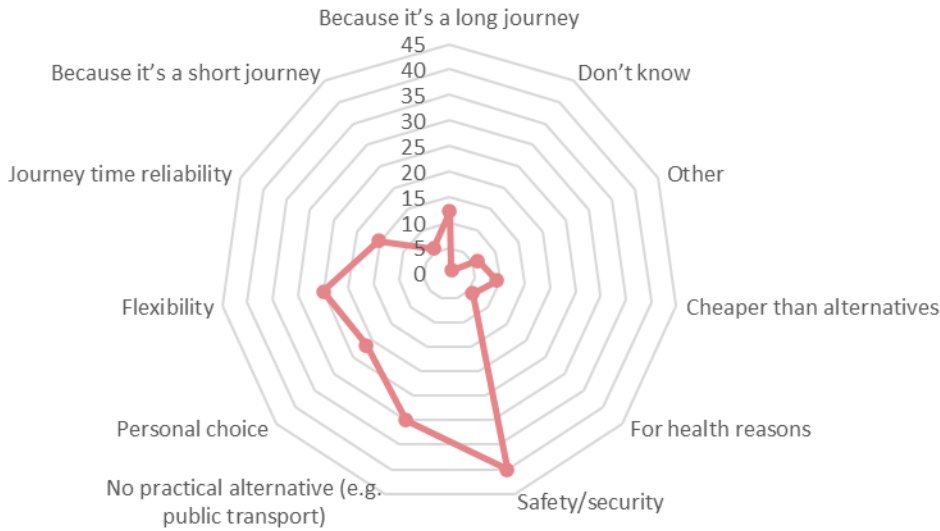
**Figure 64: Modes used by night-time travel for leisure and visiting friends and family, Jan 2024**



Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was 'Which combined of the following types of transport do you use to get around London late at night / early in the morning?' (All those travel for leisure or visiting friends and family)

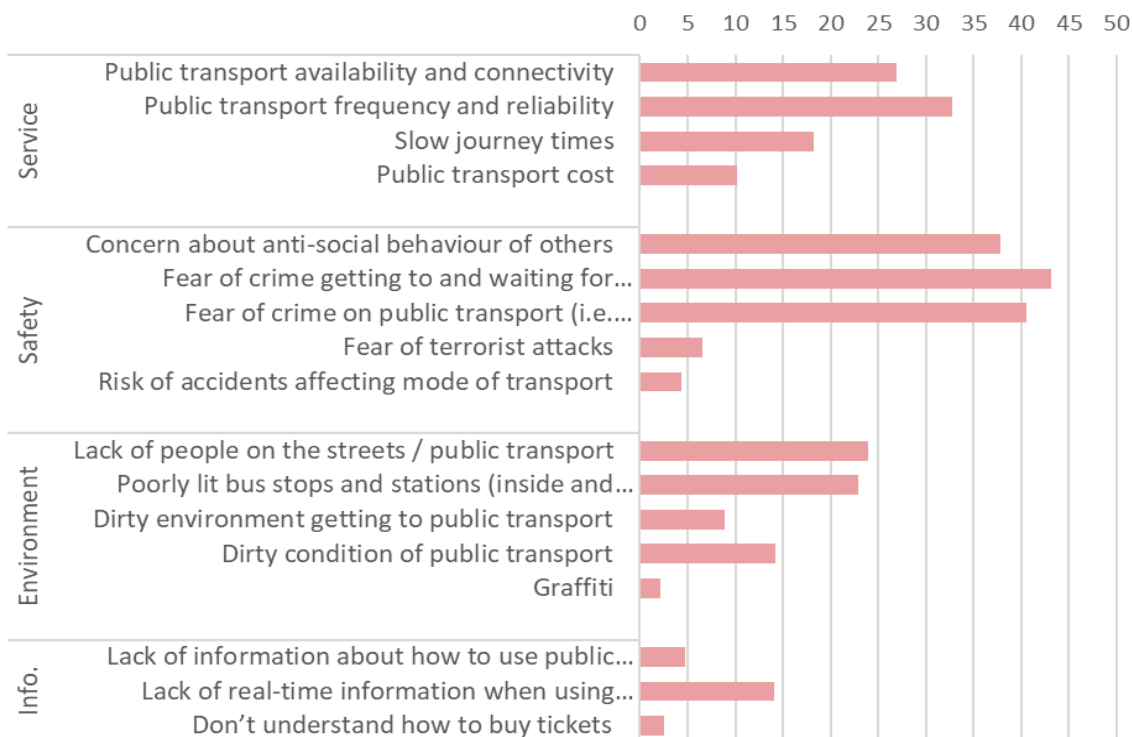
**Figure 65: Reasons for travelling by car or taxi at night** in London, Jan 2024



Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was 'Which is the main reason why you choose to travel by car or taxi?'

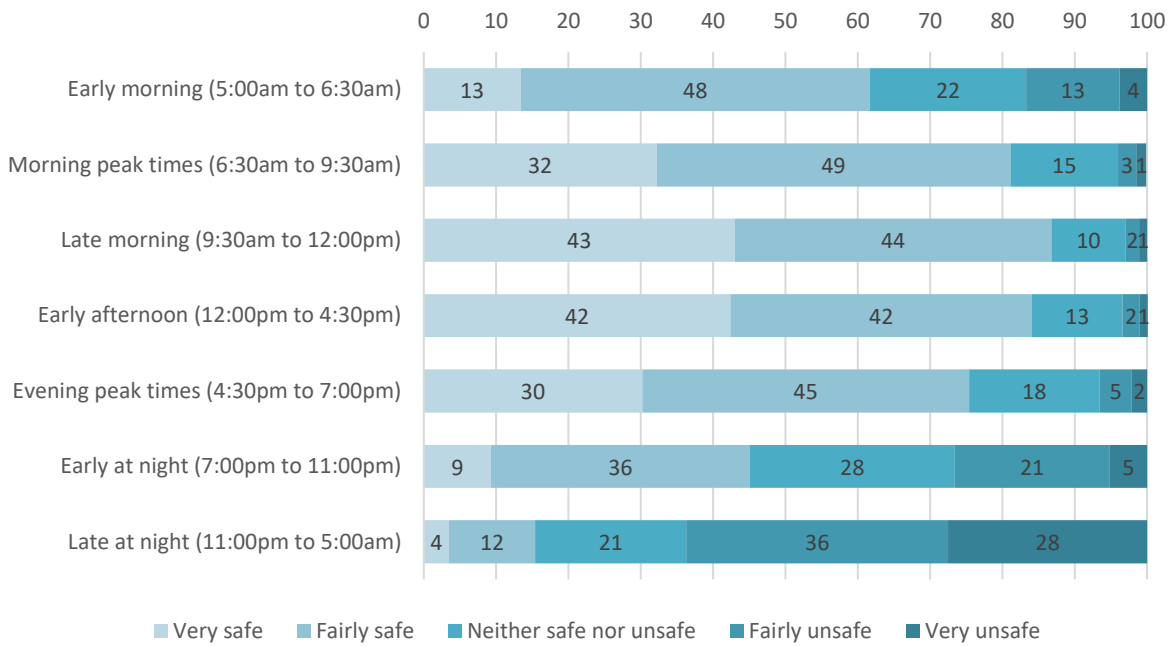
**Figure 66: Barriers to using public transport at night** in London, Jan 2024



Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was 'Which of the following prevent you from using public transport more often in London late at night/early in the morning?'

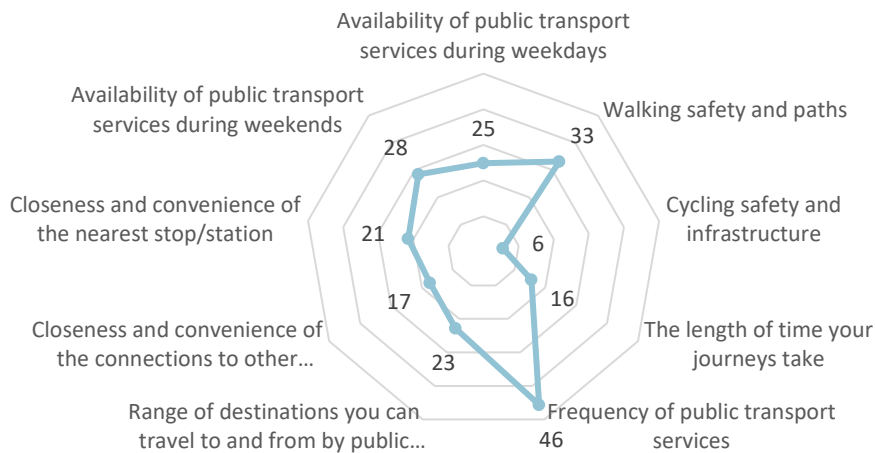
**Figure 67: Times of day would consider safe or unsafe to travel in London, Jan 2024**



Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was ‘Across all different modes of transport, which of the following times of day would you consider safe or unsafe to travel in London?’ Numbers may not sum due to rounding.

**Figure 68: Objective (or functional) factors most important priorities in London, Jan 2024**



Source: YouGov late night travel survey Jan 2024, TfL analysis

Notes: Survey question was ‘Which of the following do you consider to be the most important priorities for improving late-night/early morning public transport in your area?’



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