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# THE OUTLOOK ON NIGHTTIME ECONOMY





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# **THE OUTLOOK ON NIGHTTIME ECONOMY**



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# FOREWORD

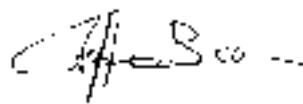
The Smart City never sleeps - This was the title of our conference on Nighttime Economy organized in 2019 in New York City together with the German Center for Innovation and Research New York. Looking back to the exciting development of the last years in the field of smart cities and urban economies all over the world, it is painful to see current economies struggle with the severe impact of Covid-19 on vital city centers, the nighttime economy, and public life in general.

We addressed these new challenges, in a virtual conference on Nighttime in Cities aimed at the European cities' context in June 2020, together with the UK Science & Innovation Network and the British Embassy in Germany and international attendees. Based on this outcome Fraunhofer IAO has gathered insights from the best practices including examples from London, NYC, Washington D.C., Mannheim, as well as private sector use cases highlighting the importance of the night mobility and data for smart and future-proof cities of tomorrow.

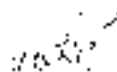
This paper is our contribution to finding success strategies for nighttime in cities regardless of the size, location, and background. We advocate for a better understanding of the landscapes of cities at night driven by the use cases and quantitative and qualitative data. Better planning and cooperation of multilevel stakeholders is the key to ensure that the local culture is glowing, rights and safety of after-hours workers are secured, and nighttime works for the benefit of the local economy. Resilient nighttime built up by flexible business models for sustainable, livable, and versatile cities is what we need even more recovering from the Covid-19 challenge.

Our experts have conducted comparative research that throws light not only on successful big cities that are already profiting from vibrant nightlife but also on small and mid-size cities that are only learning what is the best way forward. Expert interviews with key players in building a nighttime economy helped to identify the obstacles and create an assessment framework that can be tailored for each specific city on their way to future-proof nighttime. We aim to identify the nighttime paths that will fit the cities according to their opportunities while grasping the character and preserving the identity.

It is time to release the undisclosed potential not only of the city at night but also of suburban areas. Only united, activating the community and giving more chances for people to participate in the way their city is changing, bringing various stakeholders together we can support the transformation of the night. Thanks to all who helped us with our research, together we will strengthen the nighttime for the local economies and wellbeing of the people.



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# ZUSAMMENFASSUNG / SUMMARY

Der wirtschaftliche und demografische Wandel sowie die technologische Entwicklung gehen bekanntlich mit vielen Herausforderungen einher, bieten jedoch ebenso genügend Raum für neue Möglichkeiten; auch für die einer »24-Stunden-Wirtschaft«. Die wirtschaftlichen Belange beschränken sich schon lange nicht mehr nur auf das gewöhnliche Tagesgeschäft. Die Bedürfnisse der Gesellschaft haben sich verändert und somit die Nachfrage nach unterschiedlichen Dienstleistungen am Abend und in der Nacht erhöht. Die Nachtwirtschaft, zu welcher Aktivitäten zwischen 18 Uhr und 6 Uhr zählen, bietet großes Potenzial, nicht nur durch Unterhaltung in Clubs und Bars erheblich zum lokalen Wirtschaftswachstum beizutragen.

Eine erfolgreiche und gewinnbringende Nachtwirtschaft setzt jedoch eine ganzheitliche Strategie voraus, die auf Grundlage des sozialen, kulturellen und wirtschaftlichen Kontexts einer Stadt entwickelt wurde. Auf Grund dessen nehmen immer mehr Städte und Kommunen die Belange rund um die Nachtwirtschaft auf ihre politische Agenda. Sie organisieren und regulieren die nächtlichen Aktivitäten auf Regierungsebene, indem sie unter anderem Anlaufstellen beispielsweise in Form von Nachtbürgermeister\*innen oder einer Koordinierungsstelle der Nachtwirtschaft schaffen, um abgestimmte bottom-up-Richtlinien zu entwickeln. Damit soll die Kommunikation und Kooperation zwischen den betroffenen Akteuren erleichtert und verbessert, Konflikten vorgebeugt sowie Verantwortlichkeiten geklärt werden. Dabei können sie von Städten wie London, Amsterdam, New York und Mannheim lernen. Diese Best-Practice-Städte zeigen, dass eine erfolgreiche Nachtwirtschaft einer Roadmap folgen muss, welche auf Grundlage eines vertieften Verständnisses der Nachtwirtschaft und durch einen intensiven Dialog mit den Stakeholdern erarbeitet wurde und die suburbanen Räume miteinbezieht.



Economic and demographic shifts as well as technological development might imply certain urban challenges, yet they offer numerous opportunities as well, such as the establishment and upscaling of the 24-hour economy. Economic concerns have long ceased to be limited to the ordinary “9 to 5” business. The needs of society have changed and thus the demand for different services in the evening and at night has increased. The nighttime economy, which includes activities between 6 p.m. and 6 a.m., offers great opportunities, not only through entertainment as clubs and bars but by providing a significant contribution to the local economic growth.

A successful and profitable night economy, however, requires a holistic strategy that has been developed based on the social, cultural, and economic context of a city. As a result, a growing number of cities and municipalities are putting issues relating to nightlife on their political agenda. They organize and regulate night-time activities at the governmental level by, among other things, creating contact points, such as night mayors or coordination offices for the night industry, in order to develop coordinated bottom-up guidelines that facilitate and improve communication and cooperation between the local actors. This helps prevent conflicts and clarify responsibilities. The available best practices from cities like London, Amsterdam, New York, and Mannheim show that a successful night economy must follow a roadmap developed based on a deeper understanding of the night economy through intensive dialogue with the stakeholders including the suburban areas.



# WHY NIGHT?

The nighttime is a timeframe that many cities are yet to exploit to its full potential. It has received increasing attention from the local governments, research, and private sector in the last decade. The nighttime economy (NTE) is defined as any economic activity taking place between 6:00 p.m. and 6:00 a.m. Active nighttime strategies foster the creation of new business models, partnerships, and management approaches to exploit the full potential of the night.

While NTE is commonly perceived as a synonym to an entertainment and culture industry, it could be represented by a much wider range of sectors including healthcare, transportation services, telecommunication, food production and services, delivery, etc. Nowadays, NTE can be a powerful tool to increase the attractiveness of the city and create jobs, whilst boosting the economy. For years now, the daylight has no longer restricted urban economic activity to 12 hours, and the demand for the 24-hour economy is as high as it has never been. Non-standard working hours and high demand for after-hours economy create the need for new regulative policies and a guarantee of adequate working conditions. Nowadays, the nighttime is an integral part of any urban economic structure.

The Outlook on Nighttime Economy aims to provide a snapshot of some of the best practices of NTE as well as the less successful NTE implementation strategies. The insights presented here are based on four semi-structured interviews with the Night Mayor of Mannheim, Night Mayor of Washington D.C., a representative of Greater London Authority, as well as a representative of a Club Commission in Stuttgart. This report also includes a synopsis of a rather unsuccessful NTE strategy in Reims, which is based on the analysis of the relevant literature and local media. The Outlook on Nighttime Economy provides an overview of the NTE strategies applied to the cities of different size and social and economic contexts. Drawing on the lessons learned from the case studies, The Outlook on Nighttime Economy suggests the key factors for running a successful NTE introducing the potential tools and methods that could be used by the local stakeholders to better understand the value and components of a successful NTE strategy. This report seeks to inspire a further discussion on NTE and its potential for boosting local economies.

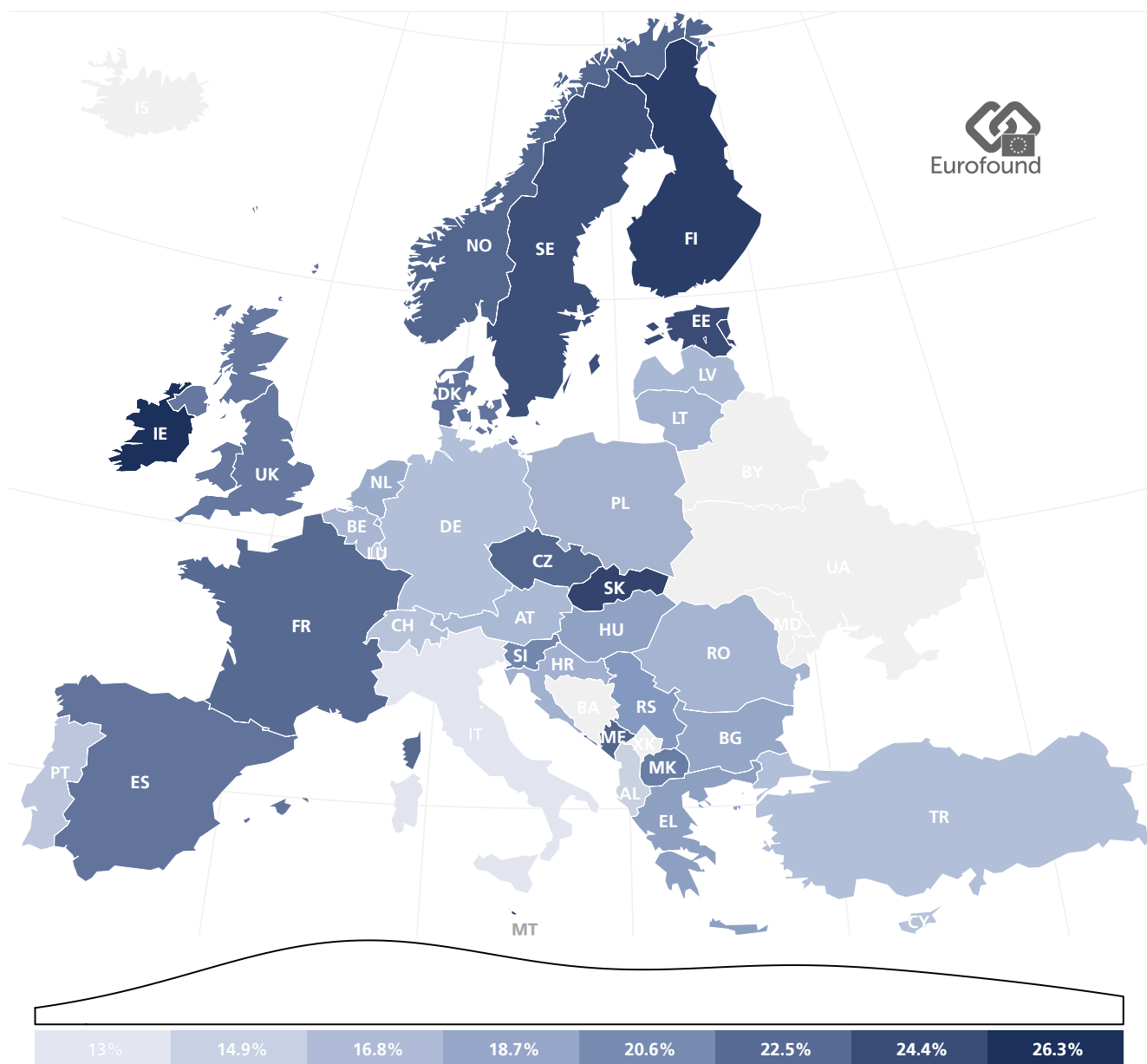


# THE EMERGENCE OF THE NIGHTTIME ECONOMY

Economic transformation, demographic shift, and technological development are the three main drivers that fostered the emergence of a 24-hour economy. At the end of the XX century, the service sector had grown tremendously and shaped the economic structure in the developed countries from producing goods to providing services (Glorieux et al. 2008; Presser 1995; Presser 2004). Additionally, the growth of women's employment, an increasing number of two working parents in the nuclear family, transformed the needs of the society and grew the demand for specific services in the after-working hours. In Europe, in the past twenty years, women's employment grew by 11% among the population aged 20 to 64. The postponement of marriage, along with the rise in real family income resulting from two earners, has also increased the demand for recreation and entertainment during late hours and weekends. Along with the service and leisure sectors, the demand for late-night medical services increased driven by the aging of the population and changing lifestyles of modern families. And most importantly, technological development has moved the world economy to a 24-hour economy. Globalization, multinational businesses, as well as fast and affordable technologies fostered the NTE and blurred the time zones for doing business.

Based on a 2010 working conditions survey, one-fifth of all European population worked at night at least once a month (Figure 1) (European Foundation for the Improvement of Living and Working Conditions 2010). This would hint at the need to organize and regulate nighttime activities on the governmental level as well as improve the communication between the major actors of the nighttime. NTE has the potential to contribute to local economic growth significantly. However, the successful execution of the nighttime projects calls for building the holistic strategy for the NTE, including ensuring adequate working conditions for the nighttime employees.





**Figure 1** Heat map results for the survey "How many times a month do you work at night", answer "once or more" per country. (European Foundation for the Improvement of Living and Working Conditions 2010) © Eurofound

# THE NIGHTTIME ECONOMY TODAY FOR SMART CITIES

NTE is a rapidly emerging phenomenon in many contemporary cities across the globe. However, the successful implementation might require a tailored governance approach. The lack of guidelines and regulations may result in poor working conditions, as well as attract criminal activity and disturbance rather than additional revenues. Often, governments regulate the opening hours of businesses, inter-industry competition, as well as licensing laws to ensure that the local NTE is well functioning and capable of providing numerous opportunities for the local citizens and city guests.

Understanding the need to define and drive the strategy for nighttime hours, many cities have appointed "night mayors", "night czars" or created offices for the NTE. Night Mayor roles have been initiated in such cities as Amsterdam, London, Zurich, New York City, and Washington D.C. For the past two decades, approximately 40 cities have assigned nighttime officers to manage the NTE (Seijas and Gelders 2020). The main tasks of the night mayors are to facilitate communication between multiple actors of the NTE, represent their interests in the city hall, and foster the development of regulations to support the NTE. In some cases, associations represent the interests of night business owners, such as Clubcommission in Berlin, and Clubkollektiv in Stuttgart. In the next chapter, this report discusses introduces the main features of the 24-hour London team in London, Night Mayor's office in Washington D.C., as well as Clubkollektiv in Stuttgart.

Moreover, NTE could be utilized by middle-sized cities as a strategy to revitalize the local economy and provide jobs. For example, such cities as Mannheim, Leeds, or Nottingham are famous for utilizing the NTE strategies to encourage local businesses to prolong the working hours in the city centers. Such an approach helps create jobs and prevent out-migration.

Additionally, the NTE might change the perception of urban space. Closed factories and post-industrial buildings are being transformed into spaces for entertainment, culture, and leisure activities. Old breweries and fire stations become favorite leisure spots for locals and city guests. From Berlin's Kulturbrauerei to South London's Theatre, the cities are changing their vision on urban space usage and working hours.

Today's NTE breaks the prejudice that time after 6 pm has only entertainment to offer. A wide range of industries represents the NTE: including but not limited to transportation and delivery services, hotels, clubs, restaurants, broadcasting, health, and social services. Supporting all these industries provides jobs, increases tax flow, aids both small local businesses, and established corporations. For a long time, the NTE has been underestimated and therefore understudied. However, cities have started to quantify the monetary contribution to the overall city and country economy, study the nighttime actors, and the cultural impact. The following chapter provides an overview of the case studies of the cities implementing NTE. The case studies provide insight into quantifying the impact of NTE, successful governance of the night, and lessons learned.

# OVERVIEW OF THE CURRENT PRACTICES IN THE NIGHTTIME ECONOMY

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## Case 1: London, United Kingdom

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London is one of the most advanced cities in implementing NTE development on the governmental level. The Greater London Authority (GLA) actively works on quantifying the NTE impact on the economy of the region and of the United Kingdom. According to the last available data, in 2014, London's NTE contributed from £17.7bn to £26.3bn in GVA to the UK economy, which also accounts for 12% of the overall London's GDP. These figures are likely to grow by a further £1.63 billion a year by 2026 and by £2 billion a year by the end of the decade (London First, Ernst & Young 2016).

In 2017, London's night economy provided 33% of all jobs in the city, which accounts for 1.6 million jobs. Regardless of the common perception that the night hours are a rather marginal time and attract a minor part of the city population, the numbers show that the majority of working people are from the health industry, professional services, and transportation. Entertainment and culture might be the sectors that are more visible at night; however, their estimated economic contribution might be lower compared to professional and financial services, health, and social work sectors.

Considering the substantial economic contribution of NTE, London actively integrates its development in strategic city planning. The city has the 24-hour London team that creates the vision of the nighttime for London. The city encourages the boroughs to create their perception of NTE too (Greater London Authority 2017). London organizes regular Nighttime Borough Champions meeting chaired by the Night Czar Amy Lamé, where the representatives of the boroughs are invited to share the best practices and develop their strategies to implement successful NTE. Such and similar meetings are instrumental in promoting cross-departmental exchange. According to the representatives of GLA, *"as nighttime economy touches upon multiple urban areas including health, transportation, business, socio-economic development as well as culture and entertainment, cross-departmental work is essential for designing adequate policies and initiatives that would maximize the benefits of the nighttime economy"*.

As a result, London's authorities have initiated the Nighttime Enterprise Zone pilot project, which provides financial support to NTE pilots in London boroughs. Waltham Forest and its high street revitalization project to combat the decline in retail activities have been selected as the first Nighttime Enterprise Zone. As a pilot project, the case of Waltham Forest may result in continuous support of London boroughs. This initiative hints at the importance of holistic NTE strategies focusing on less-central locations and promoting local economies as well as community engagement.

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## Case 2: Washington, USA

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In Washington D.C., the nighttime mayor's role has been created because of legislation initiated in 2017, which was signed into law in 2018. The primary function of the office is to serve as a bridge-builder between businesses that operate at night and the city and its residents. The nighttime strategy follows the "education before enforcement" model helping businesses understand different regulations and compliance issues.

One of the major milestones of the nighttime mayor's office is an NTE impact study commissioned in 2019. The study aims to explore and quantify the benefits associated with NTE. According to the study, the NTE sector hosts 65000 jobs and 2500 businesses in Washington D.C., which amounts to ~ \$560m of the annual tax revenue. The total spending at night equals 7.1 billion dollars a year. This spending has significant direct, indirect, and induced impacts on the local economy in the city. For instance, NTE has a significant effect on the estate and marketing sectors. It is estimated that the real estate revenues associated with commercial rents for nightlife activities reach 400 million USD/year, while the marketing industry revenues from NTE amount to 50 million USD/year. These findings highlight the importance of the NTE sector on the local economy and, especially the job market.

The study has also highlighted some of the challenges associated with NTE in Washington D.C. For example, it has investigated the impacts of the metro train system on local businesses. During the last 3 years, the metro lines have been undergoing maintenance work, which has resulted in reduced operating hours. According to the night mayor, up to 80% of local businesses have been affected by this, reporting a total decrease in revenue by 30%. This is largely associated with the fact that 54% of employees that work in the NTE sector live on the outskirts of the city and thus are dependent on public transport. Reduced metro operating hours have a strong negative impact on the opening hours of the local businesses.

The nighttime mayor's office is looking into programs for addressing the challenges flagged by the study. The office had initiated numerous petitions and public campaigns.

Overall, the Night Mayor of Washington D.C. emphasizes the need for understanding and recognizing the value of NTE for cities to manage and grow the sector successfully. The night mayor has stated that ***"Without this nighttime economy a large share of revenue is lost for not only the city but also different sectors across the board"***. Understanding the full spectrum of direct and indirect benefits associated with NTE helps to secure support from local governments, communities, and businesses.



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### Case 3: Stuttgart, Germany

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NTE has become an important cultural and economic subject in many communities. In Stuttgart, the Clubkollektiv acts as a mediator between clubs, bars, and pub operators, society, and politics. Founded in 2014, the organization helps nighttime business owners handle issues concerning local regulations, such as rent levels or fines for the lack of a prescribed number of parking spaces available to customers. Additionally, the Clubkollektiv acts as a lobbyist for NTE in Stuttgart. The interviewed representative believes that *“a mediator, who would bring the nighttime and local politics together, is essential for a successful NTE in Stuttgart”*. It would bridge the gap between what appears to be a contradictory understanding of NTE by local politics and society.

According to a representative of Clubkollektiv, for NTE to be adopted, the decision-making process should involve representatives from different levels of municipal governance and local communities. Clubkollektiv is advocating strongly for appointing a nighttime mayor to fill the desired mediator role in Stuttgart. Together with other relevant stakeholders organization has defined a concept for NTE and the role and functions of the nighttime mayor in Stuttgart. This framework has formed the basis for the subsequent municipal-level discussions. In December 2019, the city of Stuttgart decided to allocate the annual budget to the nightlife coordination office. This office would be divided into two positions: the coordination office itself, which mostly deals with municipal administration, and the position of the actual night mayor, who would represent the office as a whole. The night mayor would act as a contact person, moderator, expert, and vision developer for the "City after Eight" in Stuttgart.

The majority of discussions around NTE in Stuttgart seem to be concerned with the entertainment and cultural aspects of NTE. However, there appears to be the need to improve the image of nightlife and adopt more expert-driven practices of estimating the full range of benefits of NTE. Nevertheless, the city provides a great example of bottom-up policy creation for initiating NTE in middle-size cities.

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#### Case 4: Mannheim, Germany

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While big cities like London and New York develop the NTE as a natural response for the high demand and dynamic lifestyle, smaller cities like Mannheim work on their nighttime as a way to increase the attractiveness for the residents and tourists. Mannheim's NTE strategy was built around creating a safe and comfortable environment in the city after day hours and increasing the attractiveness of Mannheim as a city of music. Numerous projects were launched to create a local nighttime culture and boost the economy.

Having a dialogue between multiple actors of the nighttime and finding common ground with an aligned growth strategy is the key. Multiple initiatives have been established to achieve this. For example, the "Round Table Nightlife" happens monthly with the city administration and the police. Likewise, „Bar & club owners meeting" invites the business owners to communicate the challenges they face and express their views and wishes for policies that would support their businesses. These types of meetings imply a higher adoption rate of nighttime projects. Open communication and transparency help to avoid miscommunication and conflicts between the stakeholders.

The city is famous for numerous other initiatives in NTE. For example, "Nette Toilette" is a project that allows people to use the toilet at the venue without necessarily being a guest and buying food or drinks. As a result, the streets in the city become cleaner and safer, hence transforming the general attitude to nights out into more favorable. According to the interviewed representative, *"successful launch of such a nighttime economy project can be executed only with acceptance and cooperation with venue owners, and monthly round tables help to derive and deliver ideas that all involved stakeholders benefit from"*.

In Mannheim, the community engagement and number of the launched projects have been used as key performance indicators for assessing NTE performance. However, recently the city has started looking into creating more elaborate the methods of quantification of the local NTE impact.

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### Case 5: Reims, France

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In the continuous competition with other cities, the Reims municipality was tasked with increasing the attractiveness of the city within the larger region. An attempt to employ NTE strategies was made to improve the city charm by offering cultural activities, redefining the usage of urban space, and extending the working hours of local businesses.

Besides revitalizing historical places of the city, new public spaces have been created hosting regionally important cultural events. It indeed boosted the local economy and attracted visitors. Along with a growing interest in the local economy at night, the demand for after-hours transportation rose too, since the majority of establishments worked after public transit hours. However, there was **a noticeable lack of communication and cooperation between nighttime services and nighttime activities**. The first sign of uncoordinated city policy was the problem to get to the city and back during the night. Even though the municipality launched a taxi service for students and added additional tram lines for after-hours, the citizens were poorly informed about these options and hence were not using the service (Mallet and Burger 2014).

Following the example of several French cities, Reims introduced the so-called “nighttime charters” and “local codes of conduct” to mitigate conflicts caused by nighttime activities. A few drinking establishments had closed in the city due to complaints and thus the new codes of conduct brought hope for the sustainable development of NTE in the city. Despite several successful applications of the “nighttime charters” and “local codes of conduct” in such cities as Lyon, Lille, and Paris, very few people were aware of the charter in Reims. As a result, the resident complaints and protests against night activities disturbing their night rest continued.

At the same time, the local businesses also struggled, as the process of getting an alcohol-selling license was long and expensive. Despite numerous municipal plans to create an authority handling nighttime operations and permit, none was created.

This case study highlights the importance of the holistic approach towards NTE. ***Well-aligned policies and proper communication channels are crucial for facilitating dialogue between the relevant stakeholders, avoiding conflicts, and identifying the responsibilities for potential consequences and disturbances.*** The case study of Reims demonstrates how the lack of coordination undermines the effort to create a functional urban night.

# THE KEY SUCCESS FACTORS FOR RUNNING THE NIGHTTIME ECONOMY

Based on the case studies, the following success factors can be defined for implementing NTE projects and initiatives:

## 1. Road-mapping on a local government level

The cities that acknowledge the significance of the NTE integrate it into multiple levels of policymaking. Some of the best use-cases such as London, Washington, and Mannheim, have created commissions and taskforces to build roadmaps, as well as developed designated NTE strategies and recommendations/guidelines.

## 2. Nighttime officers

Institutionalized nighttime mayors play a crucial role in advocating for the social, cultural, and economic development of the night. Creating a designated authority to handle nighttime issues and consult nighttime businesses has proven successful for many cities around the globe.

## 3. Considering the outskirts

Cities with successful NTE strategies are expanding their nighttime activities to less-central locations to reap the benefits associated with the wider impact of a robust NTE.

## 4. In-depth understanding of the holistic value of the nighttime economy

Both Washington and London conduct impact studies that explore and quantify the direct, indirect, and induced impacts of the local NTE in the city. Understanding and recognizing the full spectrum of impacts associated with the NTE helps them manage and grow the sector successfully, as well as secure support from local governments, communities, and businesses.

## 5. Strong stakeholder dialogue

Having a dialogue between multiple actors of the nighttime and finding common ground with an aligned growth strategy is the key. Mannheim established monthly round tables with city administrations, business owners, police, and community representatives from the beginning of its NTE development. Open communication and transparency help prepare the city stakeholders for change, as well as avoid miscommunication and conflicts.

## 6. Bottom-up policy creation

As Mannheim and Stuttgart cases demonstrate, the initiative from the local citizens has a high positive impact on the creation of an NTE in the city. It helps to communicate the actual needs of the city and aligns the policy in a more efficient and agile way.

## 7. Size does not matter

Smaller cities have a high potential for running a successful NTE. While big cities develop the NTE as a natural response to the dynamic lifestyle, smaller cities might use the nighttime strategies to prevent out-migration, while increasing their appeal.



# OUTLOOK: FUTURE DRIVERS OF THE NIGHTTIME ECONOMY

The new decade brings new elements and shapes the economy. These new generation changes are likely to become mainstream in building NTE:

## **Driver 1: The rise of nighttime mayors**

Cities, regardless of the size and background, can build an NTE with a unique vision. Nighttime ambassadors can help to find a way and identify a designated way to do so.

## **Driver 2: On-Demand nighttime mobility**

Transportation at night is a crucial element for the healthy running of the NTE. Flexible, demand-oriented mobility solutions are the key to the wellbeing in the night.

## **Driver 3: AirBnB for pop-up bars & social places**

Flexible lifestyle, transforming nights change the nighttime entertainment as we used to see it. Nowadays “Burning man” style bars can give an excellent revenue push and create an attractive city image.

## **Driver 4: Smart (predictive) security**

Order disturbance is one of the possible issues that may pose a challenge. Smart police concepts based on AI and collected data have the potential to reduce the level of nighttime conflicts and increase the safety for all the stakeholders and participants of various night activities.

## **Driver 5: Covid-19 recovery plan**

The recent pandemics outbreak changes the rules of the game for the NTE stakeholders. Complying with social distancing while still keeping the business profitable and preserving the fun aspect is a challenge, but not impossible.

# TOOLBOX: NIGHTTIME ECONOMY ASSESSMENT

Fraunhofer IAO has gained extensive experience by collaborating with cities around the world on several topics concerning the latest urban development needs, trends, innovation, and technologies. Since the NTE concept has been gaining speed, the Fraunhofer research teams have been stepping up to support cities with developing individually-tailored nighttime strategies, policies, recovery plans, and roadmaps to help cities to integrate successful NTE strategies on the local level. The tools and methods that Fraunhofer employs include but are not limited to:

- | **Stakeholder mapping and engagement.** As seen from the case studies above, the identification, understanding, and involvement of the relevant stakeholders determine the success of NTE strategies.
- | **Nighttime economy impact assessment.** NTE spans across the social, economic, and environmental domains. Understanding the full spectrum of positive and negative impacts associated with NTE would help develop well-targeted strategies and policies on a municipal and/or enterprise level.
- | **KPI definition and monitoring.** To derive meaningful insights on the impact of NTE, relevant metrics need to be selected and monitored. The selection of KPIs might depend on the strategic municipal and/or enterprise priorities.
- | **Tailored economic development advisory services.** Running a successful NTE strategy calls for careful planning and implementation of activities based on a thorough understanding of the market's needs and capabilities cross-linking it with the local political priorities.
- | **Roadmapping and recovery planning.** Integrated recovery planning is essential for restarting NTE activities during the COVID-19 time. Developing joint strategies and roadmaps for NTE deployment might increase the local acceptance of NTE activities and boost the available service base.
- | **Multiplier Effect Assessment.** Local and relatively small-scale NTE initiatives might create a chain of reaction and provide a significant contribution to the local GDP, boost competitiveness and innovation in cities.
- | **Holistic Value Model creation.** It is crucial to understand the full spectrum of NTE benefits and costs incurred by individual beneficiaries. The holistic Value Model would help better understand the interaction between different stakeholders, assess their willingness to pay, and offer alternatives for financing mechanisms that could be used for NTE activities.

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