



# KINGS ROAD

BASELINE AUDIT - Night Life

January 10th, 2022

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# Kings Road Baseline Audit Nightlife

## Executive Summary

The Nightlife audit was commissioned to establish what the area currently has to offer; what the current changes and trends in the hospitality sector are; and what recommendations will help attract the right kind of visitors to the BID area. The Night-time offer has to meet the requirements of extending the day and recreating the creative district while still catering for all those who live, work and socialise in the BID area. When considering how the district should develop and grow, the creative district for a modern audience should be the focus for the area's offer, public realm, design and aesthetic. The success of the Kings Road in the past is its traditional High Street structure. Whatever successful decades we look at, each street block's offer consisted of a mix of trades and experiences that started to shift for Kings Road in the 1980s as it did with most of England's High Streets to a more retail dominant offer. One of the biggest successes of the past that Kings Roads had to offer has strong links to the demands of today's markets that is the experience economy. The street was a place to be seen with the foundations of social photography before Instagram and Tik Tok and with interactive stores and a mix of each block to capture interest and increase footfall.

## Recommendations for Future Work

The Audits are being undertaken by the relevant specialists in the

AttisTowns team, following briefings by Paul Barnes and Gary Reeves. The Audits take account of the findings of the Feasibility Study, the agreed Strategic Vision, and the commitments of the Business Plan. They also take account of relevant existing plans (e.g. the Local Plans and neighbourhood plans).

There is naturally a cross-over with other Audits, in particular security and brand, and we must ensure that these issues are addressed together, not in silos.

**Recommendation One:** The BID should sponsor the setting up of a Nightwatch Forum for the BID area. Night Watch is an industry led meeting for all that operate in the night-time economy (Operating hours 18:00-06:00). The meeting would link together the night industries, police, the councils' sections that provide services and regulate the night-time economy, Business Improvement Districts, not-for-profit, community interest companies and other key stakeholders. This forum works to build better working relationships to prevent issues and improve the management of the night-time economy, enabling it to thrive and be curated into a safe and regulated environment.

**Recommendation Two:** The BID should sponsor the setting up of an Attis Town Team. Town Teams are proactive organisations that include businesses, landowners, residents and others working collaboratively with their local government (or equivalent) to improve their local place or area. The Town Team approach is innovative, creative and fun! Most importantly their way of working speeds up change and makes it an area resilient to future challenges.

**Recommendation Three:** The BID should commission an audit with an action plan of the Kings Road’s Digital realm. Due to the large number of changes in the Kings Road over recent years its online presence has a large number of businesses showing they are permanently closed and many other businesses whose online location does not match its real life location which is detrimental to the user experience. The digital Realm is just as vital for a visitor experience as the public realm with use of mapping, social media and various other location based requirements making sure the Kings Road digital realm is up to date and accurate will ensure the success of the area’s reputation and its businesses.

**Recommendation Four:** The BID should commission a Policy Review. The policies which govern and shape the BID area are up for review during the first five years. To shape the transformational change going forward we would advise reviewing all these policies together in relation to the BID area vision working in partnership with the Council, and stakeholders to ensure all policies affecting the area work together to ensure the priorities are met.

**Recommendation Five:**  
The BID should commission a Place Curation Database. This database takes all the information about a place from all sources, such as audits to public and private data and merges it into one place in a geographical structure. Mapping the whole area in this way will inform decision making and support the area’s development and curation into a resilient and competitive area and most importantly using this system speeds up change.

**Recommendation Six:** The BID should commission a Place Making Curator from Attis to head up the Town Team to achieve

the goals of curation of the district as this is a vital component for the BID area. Combining the use of the buildings, tenant selection, placement, business development, shop front design, public realm and all the other areas of placemaking which combine the BIDs objectives with those of the Mayor’s office, the council and the neighbourhood plans to curate Kings Road for all who live, work, socialise and visit the area. Place Making Curators would work together with their counterparts in the Estate teams and support the smaller stakeholders and landowners to achieve the benchmark of the area.

**Recommendation Eight:** The BID should commission Heritage and Cultural Trails. Kings Road has a long history both culturally and architecturally. A heritage trail not only highlights this but would work to attract existing visitors back and new types of visitors, using the trail as a mechanism to drive footfall to other parts of the BID area which at present may not be in demand.

**Recommendation Nine:** The BID should commission a Nightlife Business Guide To support businesses through the transformational change of the BID area the Nightlife business guide will showcase what’s happening in the area, support available both to businesses and their staff, profiles on key industry organisations and in-depth pieces on the BID and its partners and how they can support the BID members.

## Section One - Objectives of this Audit

The BID’s vision for Kings Road is one of:

- “Extending the day and recreating the creative district while still

catering for all those who live, work and socialise in the area. “

The role of this Audit is to assess the following and make recommendations to guide.

- Audit the BID area for all businesses operating within the Night-time Economy (18:00-06:00).
- Split the assessment of the areas offer into the cultural categories based on their primary street level purpose.
- Breakdown the current night-time cultural offer is within the BID area
- Highlight current trends
- Highlight the standards of what the BID area needs to be to recreate the creative district while extending the day within a 24 hour city and what it should look and feel like for all who live, work and socialise in it.

The Audits role is to make recommendations to be explored to move towards turning the BID area as a whole into “a creative district” by using the benchmarks which have been set to date within the area.

## Section Two – Methodology of the Audit

For the purposes of this audit we have split the assessment of the areas offer into the following categories based on their primary street level purpose with operating hours 18:00 - 06:00 (in line with the International industry, ATCM, Purple Flag and GLA standards).

Alcohol based Venues

- Traditional Pubs

- Food-led Bars, Café Bars & Branded Food Pubs
- Nightclubs & Late Venues

Food Venues

- Family Restaurants & Global Cuisine
- Fast Food & Take-aways

Culture and Entertainment

- Theatre, Concert & Dance
- Cinema, Bingo & Casinos
- Live Performance: Music & Comedy

Retail and Public Buildings

- Late-opening Shops & Markets
- Late-opening Museum, Art Gallery, Library, Education & Community Venues

Wellbeing

- Sports, Leisure & fitness Venues
- health
- beauty

Accommodation

- Hotel
- Accommodation

The area was audited with all of the businesses being separated into the above categories with totals for each and those totals being separated into the following:

Market Profile ( what type of customer base the business caters for )

- Live, Work, Socialise (LWS Total )
- Creative District ( CD Total )

Business Visibility ( does the business have an active frontage on the high street which adds to the area appeal)

- Live, Work, Socialise Street frontage (LWS Street Frontage)
- Creative District Street frontage (CD Street Frontage)

## **Section Three - Breakdown the current night-time cultural offer within the BID area.**

In line with the consumer trends for retail, hospitality and nightlife where visitors are demanding a shareable experience, places such as Kings Road as a whole are expected to offer the same immersive, shareable, high calibre experience to match that offered by the destination businesses within it. With “recreating the creative district for the modern audience” being the benchmark for the BID area it is vital that the street frontages and public realm of the BID area offer the same.

### **Nightlife Offer 18:00 - 06:00**

#### **Traditional Pubs**

The BID area has two remaining traditional pubs two of which are high calibre with regards their interior and exterior appearance and are popular with locals.

#### **Food-led Bars, Café Bars, Tea Rooms & Branded Food Pubs**

The BID area has 14 venues in total 12 of which are viewable from the street. The mix is good and diverse with an overall offer of high end and high street brands. Most of the offer is spread through the BID area but there is a clear demographic per street block with similar businesses too close to each other. Kings Road in its hey days had a larger indie-creative cafe offer and like its retail and leisure each block had a larger variety which ensured people walked the whole length of the street rather than only visiting sections and then leaving.

#### **Nightclubs & Late Venues**

The BID area has 4 late venues in total, all 4 are visible from the street. All competing destinations have a much higher amount and mix of evening culture on offer. Nightlife Culture is more than just clubs; it's about extending the day by targeting diverse niche markets which match the area's demographics. The BID can help existing businesses to develop by offering live music, comedy, art walks between galleries and venues and thus taking the BID area into the creative quarter. This will in turn attract new high calibre businesses into the area.

#### **Family Restaurants & Global Cuisine**

The BID area has 20 venues of this type, 19 of which are visible from the street. This does not include Duke of York Square as it is not in the BID area. The challenge for the High Street is how its curation has changed over the years and now if you are entering from Sloane Square you have 7-9 Blocks before you reach any family restaurants or global cuisine.

#### **Fast Food & Take-aways**

As with all high streets McDonald's is always featured. Combine this with the other mix of retail and food offer it has a large visible presence of high street businesses for the first 7-9 blocks. Combine this with these businesses' close proximity the increase in waste and a more low-end experience becomes apparent. This can be swiftly changed with working with these chain businesses and turn their look into a more bespoke outlet like they have done in other key international destinations around the world. For example McDonalds' is in the famous Chelsea Drug Store premises and as such its interior and exterior could become an asset and destination for the creative quarter.

### **Theatre, Concert & Dance**

The BID area has no cultural entertainment offer with no theatres, concert venues, dance venues, only one cinema remains and there is only one performance venue. In the past this was not the case and these venues have all been changed or demolished and as such the visitors they attracted have gone elsewhere. As an area this means people leave this area to spend elsewhere and as such their pre and post entertainment spend both hospitality and possibly retail wise will go elsewhere.

### **Bingo & Casinos**

The BID area has no gambling establishments.

### **Live Performance: Music & Comedy**

The BID area only has 1 venue of this kind. To attract more of the creative crowd and high end visitors the BID can work with existing businesses to develop their offer to cater to this market and by working with Attis can attract new businesses of this kind to the area.

### **Late-opening Shops & Markets**

The BID areas late night shops foundation is strong with 86 places open after 18:00 but most this is only till 19:00 hours which is not late enough to compete with Covent Garden, Bond Street and Regent Street The area could develop this further with an addition of a market strategy to cater to locals and visitors alike.

### **Late-opening Museum, Art Gallery, Library, Education & Community Venues.**

The BID area has no museums, only 1 art gallery and 1 late night community venue. You would expect a higher amount of culture on offer in an area such as this. In the short term the BID could develop this area by working with businesses to add art events into existing venues.

### **Wellbeing**

The BID area is well served by 23 wellbeing venues.

### **Hotels and Accommodation**

There are no hotels within this area.

## **Section Four- Current Trends**

### **Retail and Hospitality**

Retail and Hospitality trends have changed, led by visitors wanting more from their high streets and town centres. They are wanting an experience when they visit rather than pure utility. High streets and town centres, be it local or international, need to offer a diverse and quality mix so people have more than one reason to visit a place, stay there and spend their money thereby turning it into a destination of choice.

The BID area has many properties such as who have invested heavily into curating an experience within their spaces. The challenge for the BID is to extend this curation to the rest of the area for all who live, work and socialise in the area.

### **Nightlife**

Ahead of the demand for experiential retail, nightlife has been contending with this shift in user demand. One of the biggest shifts in user behaviour is 18-25 year olds' relationship with alcohol with over 38 percent of 18-25 years now socialising alcohol free. This has affected the industry's business model and what it needs to offer in the future. Visitors to the night-time economies are wanting a shareable and cultural experience be that through live music, performances, design of the venues and a higher end and diverse beverage offer such as prohibition style venues and cocktail bars.

## **Demographics**

London's night-time businesses are key drivers of growth and employment, contributing £17bn-£26bn to the UK economy before the pandemic and employing 594,200 workers in the cultural and leisure segment of the night-time economy alone. London's nightlife is one of the most vibrant in the world, integral to the lifestyles of many Londoners and drawing in millions of domestic and international tourists every year. This is a key area for development for the BID area as at present it does not offer the level of cultural entertainment to be competitive.

## **In Conclusion**

The challenge facing the BID in creating its vision is ensuring the tenant mix in the area and in each block re-creates the desired creative pull of the past, while catering to the modern audience. This challenge would be amplified by the current financial and social pressures facing society and tenants.

The task of extending the day will be a balancing act to ensure it only attracts the key niche markets of clientele to the area while being an attractive offer for all who live, work and socialise in King Road.

The area is fortunate to already have experienced estate teams who are creating amazing experiences with the highest level of detail with such developments as Duke of York Square.

As mentioned previously a diverse cross section of trades in each block is key to ensure people are attracted to the whole street and not just certain sections and thus turning the whole road into a destination rather than just parts.