

CENTRE FOR LONDON

A RECOVERY PLAN FOR THE WEST END

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Summary

The West End is London's heart, and has been resilient over centuries, but COVID-19 has struck hard:

- Central London's consumer economy, as well as its social and cultural fabric, are facing a deeper and more protracted crisis than other parts of the capital.
- By mid-July, in-store purchases in central London remained 60 per cent below their January level for apparel and food, but the figure was between 15 and 40 per cent in outer London centres such as Ealing or Bromley.
- The absence of foreign visitors has been felt most strongly in central London: 40 per cent of international tourist spend in the UK is within the Cities of London and Westminster, and Kensington and Chelsea.
- The West End accounts for one in five hospitality jobs in London, one in six jobs in the arts and one in eight jobs in retail – with demand suppressed, these are some of the most vulnerable jobs in London.

To help the West End recover more quickly from the pandemic, and make it a greener, and more liveable neighbourhood:

- Central London boroughs should continue to expand opportunities for businesses to operate outdoors.
- Landowners and Business Improvement Districts should manage deliveries to limit disruption to businesses, visitors and residents across the West End.
- Transport for London, in collaboration with the government and Public Health England, should explore whether public transport could operate at a higher capacity without increasing virus transmission.
- The Mayor of London and boroughs should bring forward a business case for expanding the availability of bikes, e-bikes and e-scooters for hire to outer London and parts of inner London that are currently underserved, and the government should provide financial support.
- Landowners, with support from the Mayor of London and boroughs, should stage weekly 'London fringe' events across the West End's streets, to create new spaces for outdoor performances that respect physical distancing rules – in addition to indoor venues reopening.
- The government should introduce culture vouchers to incentivise visits once indoor performances reopen.
- London & Partners, with support from VisitBritain, should help London's cultural institutions reach international audiences, and prepare a campaign to showcase London's offer to international visitors. Boroughs, BIDs and landowners should make a concerted effort to make use of the West End's numerous vacant spaces.
- The government should offer 'enterprise-zone' style incentives to attract new business to the West End, including lower business rates, and capital allowances on office fit-outs and adaptations.



Introduction

London's West End has long been the beating, human heart of the capital, drawing visitors – its lifeblood – from across London, the UK, and the globe. It is a unique collection of historic urban neighbourhoods, comprising houses, flats, cultural institutions, restaurants, shops, hotels, clubs, theatres, and other attractions. It is a major academic, health and business centre, and the core of London's creative industries, as reflected by the outsized contribution that it makes to the national economy.

Since its emergence in the 17 and 18th centuries between the City of London, the centre of commerce, and the stately City of Westminster, the West End has proved remarkably resilient – perhaps in part because of the broad base of activities and businesses it has always housed. The narrow streets and historical architecture make it physically unlike the commercial and entertainment centres of other global capital cities. Compared to the glass and steel towers of Tokyo's Shibuya or New York's Midtown, or to the wide boulevards of the 8th arrondissement of Paris, the built form of the West End is of a small, intimate, more human scale. Its high streets and markets reflect the different characters and specialities (tailors and men's fashion in Savile Row and Jermyn Street; restaurants, clubs and bars in Soho; theatres and boutiques around Covent Garden; art galleries in Cork Street), offering rich diversity in a relatively small geographic space.

But the coronavirus pandemic poses an unprecedented challenge for the social centre of the city. Physical distancing has suppressed the West End's visitor economy for months, while accelerating the digitalisation of retail, the shift to remote work and the virtual delivery of high street services. Although it remains to be seen how long the changes to behaviour caused by lockdown will last, the impact has been dramatic. Prior to the pandemic, central London's population would swell by as much as 80 per cent each day, as commuters and tourists flocked to the capital's core. Without this influx of visitors, the ecosystem of the West End is under threat. The area is home to just 65,000 residents, too few to sustain local services and businesses while visitor numbers are down.¹

How is London's centre recovering from the pandemic? What can be done in the short to medium term to re-animate London's beating heart, and does recovery offer the opportunity to address some of the West End's longstanding challenges of affordability, liveability and sustainability?



The West End in crisis

The economic impact of the coronavirus across the UK has been dramatic - and has varied significantly within the capital. Indeed, as the West End's knowledge economy has sustained itself by operating remotely, its more spatially-fixed consumer economy, as well as its social and cultural fabric, are facing a deeper and more protracted crisis than other parts of the capital, which have held up thanks to a surge in residents shopping locally.

Consumption crash

Government guidelines to work from home where possible, avoid public transport, and shop local, brought the West End's consumer economy to a halt during the period of lockdown. Whilst some sectors were relatively resilient (take up of the Job Retention Scheme was 21 per cent among Professional Services, compared to a UK average of 30 per cent), this was only true for those who could work remotely, and so most of the day- and night-time economy that central London workers support all but collapsed.

Domestic and international visitors, the other key West End clientele, also disappeared – between 1 April and 15 June, tourist ridership on public transport across London was only four per cent of normal levels. The absence of foreign visitors has been felt most strongly in central London: 54 per cent of international tourist spend in the UK in 2018 was in the capital, about three quarters of which was within the Cities of London and Westminster, and the Royal Borough of Kensington and Chelsea.²

In comparison, consumption held up in smaller town centres. In April, at the height of the pandemic, credit card transactions across West End businesses were 91 per cent below the previous years level – whereas London's smaller town centres, such as Southall and East Ham, saw transactions decline by just 67 per cent and 70 per cent respectively, as Londoners lived much more local lives.

Protracted recovery

Despite a phased reopening – of shops on 15 June, and museums, restaurants and bars on 4 July – the West End, and the rest of Central London has been the slowest part of the country to recover. Central London ranks last on the Centre for Cities high street recovery tracker, which measures city centre footfall.³ In early August, footfall was at 28 per cent of pre-crisis levels in central London, compared to 41 per cent in Manchester, 47 per cent in Birmingham and 60 per cent in Newcastle. The difference was greatest for weekend and evening footfall, which remained particularly low in central London into August.

Insights on retail sales from Mastercard's Recovery Insights initiative give more localised detail of how stark the downturn has been for central London in comparison to the rest of the city. While the volume of transactions had begun to recover in July, transactions in central London were still down 60 per cent compared to January 2020, but the figure was 40 per cent in Bromley and 12 per cent in Ealing Broadway, while East Ham or Southall saw increases in transaction volumes over the same period.⁴

Central importance

The slump in central London's consumer economy threatens permanent damage to its business ecosystem.

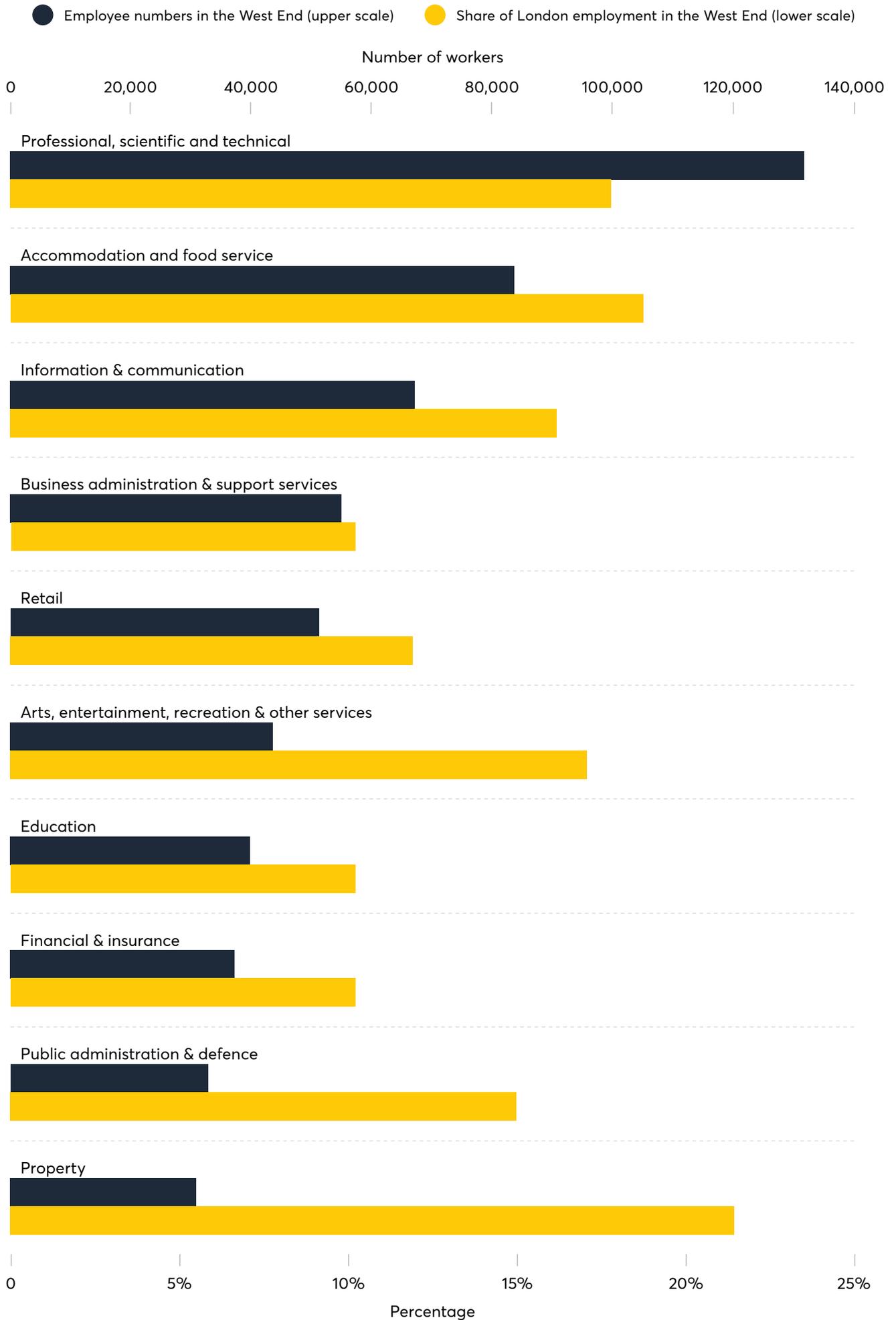
The West End has a large share of small businesses, many of which lack the financial means to adjust to physically distant modes of business operation. 74 per cent of businesses registered in Westminster and Camden have 0-4 employees.⁵ A survey of the London members of the Federation of Small Businesses found that one in three (32 per cent) have faced severe difficulties in making business rent or mortgage repayments since the start of the pandemic.⁶

Whilst the government's Job Retention Scheme and other support schemes have been a lifeline to retail, culture and hospitality businesses nationwide, a continuing slump in central London consumption could prove fatal for many of these smaller enterprises.

These losses could have huge consequences for the West End, and for London's economy. Indeed, accommodation and food is the second largest sector for employment in the West End, while retail is the fifth, and the arts and entertainment the sixth largest. The West End accounts for 13 per cent of London's jobs, but 17 per cent of the capital's employment in arts and entertainment, and 19 per cent in hospitality (Figure 1).

While some turnover of businesses is to be expected in such turbulent times, long-term or permanent damage to the city's economy, West End workers, and the West End's standing as a domestic and international destination is concerning. In some sectors – particularly culture and performing arts – it is less easy for new enterprises to take root and replace those that have been lost. Neither London nor the UK can afford for the West End to remain underused, and for its unique economy to falter.

Figure 1: Employment in the West End⁷ and share of London employment in the West End



Source: Centre for London analysis of ONS 2018 Business Register and Employment Survey using Arup geographies, jointly determined with Westminster City Council and Greater London Authority.

Long-term uncertainty

The pandemic also brings previously underlying challenges into sharper focus. Sectors such as professional services may be safe – but will a large amount of their business continue to be conducted remotely, as demonstrated possible by the pandemic? And will this generate new growth in central London, or create the conditions for further decline?

In recent years, the advance of technology has come hand in hand with a return to urban centres, and economists have argued that people and businesses will always be jostling for space near London's centre.⁸ Large tech companies, such as Google and Apple, have recently chosen zone 1 locations for their head offices.⁹ Under one scenario, central London could become more focused on face-to-face activities in the office, as employers ask workers to conduct routine, non-social tasks at home. This would resonate with workers' expectations: we know from a recent survey that Londoners expect to work from home 10 per cent more.¹⁰ Overall employee numbers could even rise, if more people come into the centre for a few days every week.

But without a fresh effort to mitigate the impact of the pandemic on the West End in the short to medium term (until a vaccine is found), workers and visitors might find that the West End they return to is very different – with less diversity in its consumer, social and cultural offering, as smaller and independent businesses, which are less resilient to a prolonged period of reduced sales, falter. This could undermine the West End's attractiveness to workers and tourists alike, and further weaken its economic sustainability.

Climate emergency

The recovery effort must also coincide with a leap forward on decarbonisation. It is hard to imagine the West End no longer drawing in a global visitor base reliant on air travel – but a lot can be done in the day to day running of the West End, from greening the fleet of servicing and delivery vehicles to reducing the energy consumption of buildings. Of course, as a global hub for consumption, more work will be needed on the environmental sustainability of the West End's supply chains.

The next part of this report looks at measures that could help the West End survive and thrive in a fast-changing world, while making progress towards the decarbonisation imperative.



UNVEILED
BY HER MAJESTY
QUEEN BEATRIX
OF THE
NETHERLANDS
ON 10th SEPTEMBER 1900

Ideas for recovery

Social streets for physical distance

In the short to medium term, the West End will need to allow residents, workers, and visitors to physically distance while visiting the area. But physical distancing requires extra space – and the West End is often short of it. The West End, particularly Soho, has historic networks of narrow streets that make staying physically distant hard. Queuing systems in place outside most shops also add to pressures on limited pavement space.

Though footfall is unlikely to return to 2019 levels immediately, bars and small theatres can operate outside, where the risk of virus transmission is lower. Following campaigns by local businesses and Business Improvement Districts (BIDs), Westminster has allowed the timed closure of 15 streets in the borough, and has extended outdoor seating areas in another 10,¹¹ while Camden has pedestrianised the Seven Dials area seven days a week. These interventions are very welcome, and should be developed further over the coming months.

Recommendation 1: Central London boroughs should continue to expand opportunities for businesses to operate outdoors, either through the timed closures of roads, or temporary replacement of parking spaces. Boroughs will also need to be sympathetic towards shelter structures needed to enable outdoor operation to continue through the winter.

Timed closures of additional streets will require management of deliveries, to ease pressure on the carriageway during the daytime, and minimise the nuisance caused to residents at night. The West End is already at the forefront of work to optimise delivery and servicing movements: the Crown Estate is opening a new consolidation centre for Regent Street businesses,¹² and most of the West End is covered by plans to reduce delivery and servicing vehicle movement. But implementing ‘social streets’, and the need to decarbonise surface transport means that London must accelerate its plans to consolidate vehicle movement and a shift towards smaller, electric vehicles and cargo bikes would also advance London’s decarbonisation agenda.

Recommendation 2: Landowners and Business Improvement Districts should bring forward objectives to consolidate and time deliveries to limit disruption to businesses, visitors and residents across the West End.

Unlocking public transport

The West End, like the rest of central London, is hugely reliant on public transport to operate. Prior to the pandemic, of those entering central London during the morning peak, only six per cent did so by car and motorcycle, three per cent by bicycle and eight per cent by bus compared to 82 per cent by underground, DLR and national rail.¹³

But the crisis has changed mobility patterns, at least for the time being. In August, London Underground ridership remained 70 per cent below the same period last year. And while cycling levels have surged to triple their

pre-crisis levels at some weekends, this has been from a much smaller base, and has shown signs of decline as car traffic has risen again.¹⁴

Emerging public health research from France and Japan suggests that transmission risk on public transport is low, and outbreaks are much more likely to happen in social settings.¹⁵

Recommendation 3: Transport for London, in collaboration with the government and Public Health England, should explore whether public transport could operate at higher capacity without increasing virus transmission.

Boosting micro-mobility

Travel to the West End should also be made easier for those who cannot or do not want to use public transport. In May, the Mayor of London announced that critical central London routes would be made free from private cars, and local authorities have restricted some streets to vehicular through-traffic during parts of the day, to offer safe routes to more vulnerable road users. Councils should move quickly to expand the number of safe walking and cycling routes and make sure schemes are joined up to create new, continuous routes into central London.

Cycle hire also has a role to play in encouraging Londoners to return to the West End. Usage of Transport for London's cycle hire throughout the summer months was at a record level, thanks to continued maintenance and free ridership offers. But bikes are only available within zone 1, and a few areas of zone 2. The offer from private hire operators also has a central London bias. Yet, cycle hire is a good way for commuters and visitors to experience new modes of transport to reach the West End.

Recommendation 4:

- The Mayor of London and boroughs should bring forward a business case for expanding the availability of bikes, e-bikes and e-scooters for hire in outer London, and parts of inner London that are currently underserved.
- The government should offer funding to increase cycle hire provision in London as part of the national cycling strategy. With Transport for London's finances severely affected by the prolonged slump in ridership, government will need to support the expansion of London's cycle hire offer.

Keeping the West End's cultural institutions alive

West End theatres are infrastructure for London's global appeal, drawing over 15 million visitors a year,¹⁶ and are a vital part of the West End's ecosystem; indeed, many associate the West End with theatreland alone. They play a significant national role – the West End makes up 60 per cent of annual revenues for UK theatres,¹⁷ and are building blocks for London's international appeal. Their closure has had a knock-on effect on footfall and consumer demand in hotels, restaurants, bars. In 2019, 18,364 performances took place across London's theatres, drawing in 15 million spectators, bringing in £800 million in revenue and £133 million in VAT payments for the Treasury.¹⁸

With performance venues under lock down for six months already, temporary closures to curb the spread of COVID-19 risk becoming permanent for many smaller, often independent, cultural institutions across London. Among these, Soho Jazz and blues venues such as Trishas or Ain't Nothing But... were forced to launch a crowdfunding campaign to survive.¹⁹ On 5 July, the government introduced a grant and loan programme worth £1.57 billion, to compensate cultural institutions for the loss of income.²⁰

But the cultural workforce is already bearing the brunt of the crisis. According to Bectu, the sector's trade union, 5,000 jobs had already been lost in UK theatres by July – 2,000 of which were since the government announced its bailout plan, and 2,700 of which were from London theatres.²¹

Meanwhile, shows could experiment with creative ways of reopening to start bringing audiences back to the West End. Small productions could borrow space from bigger venues for physically distanced performances, and stage shows outdoors in the West End's squares and parks. Landowners and cultural institutions could also coordinate a weekly 'London fringe' event, consisting of small performances – gigs, dance, short plays and mime, drag acts, comedians – scattered across the West End streets and venues able to reopen. Not only would this give London's performers an opportunity to work, and audiences a reason to return to the West End, it would also enliven public spaces and renew Covent Garden's tradition of street performance, while spreading visitors out across the West End's streets.

Such a project would of course require financial support, and strict adherence to physical distancing rules – but it is one of the few possible ways to relaunch London's performance scene early.

Recommendation 5: Landowners and larger venues, with support from the Mayor of London and boroughs, should stage weekly 'London fringe' events across the West End's streets, to create a new space for performances that respect physical distancing rules.

Culture vouchers

When theatres reopen, they will do so during a deep economic crisis, with tourism potentially still suppressed, and fewer people able to afford to return to the West End's cultural institutions. The government could introduce culture vouchers – similar to the Eat Out to Help Out scheme – to benefit young people, who are less able to pay, and boost audiences in cultural venues (in the West End and other city centres), relaunching the sector and also increasing associated spending of eating and drinking out.

Recommendation 6: The government should introduce culture vouchers once indoor performances reopen.

Promoting London's culture abroad

Drawing Londoners and domestic tourists back to the West End will be an important first step, given international tourism remains at record low. But London should make sure that once international travel is widely possible, visitor numbers bounce back, and tourists want to spend more time here than they would otherwise have. London & Partners, the capital's

promotion agency has a key role to play in bringing together the capital's cultural attractions to grow their international digital following during the crisis, to sustain London's global profile and welcome people back. It should also showcase the diversity of the capital's cultural offering, to entice tourists to stay longer.

Recommendation 7: London & Partners, with support from VisitBritain, should help London's cultural institutions to reach international audiences, and prepare a campaign to showcase London's offer to international visitors.

Making use of vacant space

As would be expected in a time of economic crisis, the pandemic has caused a slowdown of lettings in the West End's commercial property market. At the end of Q2 2020, take up of commercial space dropped down to 62 per cent on the previous year, pushing vacancy rate to 5.2 per cent.²² It is likely that vacancies will rise further, as the recession bites, and businesses close or seek to sublet spare space.

There is an opportunity to revitalise empty units through meanwhile use, to provide amenities, social activities, training and business development, and business incubation in the West End, particularly for entrepreneurs new to the area.

While the temporary use of vacant space is a very attractive idea, it can be difficult to achieve in practice – with poor information on which spaces are available and for how long, limits on the turnover that occupants can make in a small time, and landowners' preference for longer-term contracts. Meanwhile use also works better for some businesses than others. Some brands can't afford to change location all the time since they need faithful customers. But for others it could provide access to an otherwise unaffordable location.²³

But many of these issues can be overcome. While it is tempting to leave space empty to avoid taking a rent cut, meanwhile use could contribute to the West End's identity by adding a sense of novelty and surprise. Landowners could introduce 'residencies' for artists, chefs or retail brands in empty units, to keep the West End animated and encourage visitors to return.

Recommendation 8: Boroughs, BIDs and landowners should make a concerted effort to use of the West End's vacant space. This would include gathering a live record of opportunities to occupy affordable commercial space and publicising them to a list of interested organisations.

Attracting the next generation of businesses

When, and whether, the West End will return to the seemingly unbeatable economic success it experienced before the crisis is an open question. But it is evident that increased remote working could paradoxically reinforce the West End's role as a social centre. Indeed, if routine, solitary tasks are performed at home rather than in a central London office, businesses will want to dedicate their space in the West End to fostering interactions between team members. It is also likely that if going into central London is no longer a daily chore, more commuters will want to make the most of their time there. On top of this, more people working from home a few days a week would free some office space for more workers to be based in central London.

However, there could be long period of downturn before returning to growth if consumers fail to return and some businesses inevitably falter during the crisis period. This will be an opportunity to encourage growing industries to root or expand in the West End.

But even in a time of crisis, barriers to entry remain very high. Locating in the West End means paying its very high business rates, which are calculated on rateable values of previous years. Whilst existing outlets benefit from a temporary business rates holiday, a return to their pre-crisis business rates is likely to stifle sustainability and new growth alike. In August, the Mayor of London issued a call to action to support West End's businesses – asking for reform business rates in the face of competition with digital retailers and continued financial support for businesses that are struggling because of coronavirus.²⁴

The businesses that fail, and those looking for a West End location, will also have different needs. Large occupiers are likely to downsize, but their offices were often custom made, and will require significant investment for others to move in – for example, repurposing a retail floor on Oxford street into contained offices for smaller companies. It would make a lot of sense for government to offer capital allowances on fit outs for small and medium-sized enterprises (SMEs) – not only would this ensure that strategically located office space is well-occupied, but it would also lower entry barriers for those companies that might benefit from a central London location. The fit-out allowance could also be used to reduce carbon emissions from buildings, for instance by encouraging investment in insulation and heating systems.

Recommendation 9: The government should offer 'enterprise-zone' style incentives to attract new business to the West End, including lower business rates, to reflect the decrease in trade and property values, and capital allowances on office fitouts.



JAMES STREET W

Charing Cross Station
Walk down to the market and turn right into King Street

Conclusion: an important moment for the future of the West End

The West End is London's beating, social heart, and has been resilient over centuries, but that it remains so is not a given – whether the current crisis leads to long term damage depends on how successful London's mitigation strategies are. So far, government support has softened the blow for some of the biggest sectors of the West End economy – hospitality, retail and the arts, but more needs to be done. As restaurants, shops and venues reopen, it is clear that central London's economy has remained in the doldrums, while the rest of the capital and the country have both seen a stronger recovery.

Making sure that London retains its strong core is also an essential part of the decarbonisation agenda. The West End has the best public transport connectivity in the country, and its density favours active travel, so focusing recovery efforts here will avoid a car-led recovery. There is potential for progress on consolidating freight and greening vehicle fleets.

The crisis and recovery will also lead to higher turnover of businesses – London should make sure that no office space in such a favourable location is underused, and this churn should be harnessed to improve the environmental credentials of West End buildings.

The policies above will help the West End recover more quickly from the pandemic, find its unique buzz again, and build back greener. The outcome depends on whether we act in time.



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Endnotes

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About Centre for London

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