

CENTRE FOR LONDON

The future of London's pubs

Jack Brown and Richard Brown

Summary

London's pubs were already having a hard time...

- Pub numbers have been decreasing for some time across the UK, often a result of broader economic and social changes. But there are London-specific pressures too, such as the high value of land in the capital and the relative value of residential property.
- The planning system now includes measures to protect pubs from conversion or demolition, however these can be gamed and still need strengthening.
- London's diverse and constantly changing neighbourhoods provide opportunities for locally- tailored pubs to succeed but remote, mass ownership models – and brewery 'ties' – can make running a successful neighbourhood pub especially challenging.

...and have been particularly hard hit by the pandemic.

- Many pubs have struggled to adapt which has been complicated by rapidly-changing and sometimes unclear government guidance.
- Pubs in central London have faced a particularly tough time but there could be new opportunities in some outer London locations.
- The government has provided support to both workers and pubs themselves but a 'day of reckoning' looms when support, such as the furlough scheme, comes to an end.

London pubs' community role can be underestimated and under-recognised...

- There is a stereotype that city pubs are not as community-focused as rural pubs, and that Londoners are less likely to be 'faithful' to one particular 'local'. However many of London's pubs are as vital a part of the capital's social infrastructure as village pubs in rural areas.
- A substantial number of the capital's pubs also serve non-geographical communities with shared interests or identity and these pubs can be extremely important, shared spaces for marginalised groups, as well as playing an enhanced social role.
- Many of the capital's pubs are so much more than just places that serve alcohol. In recent years, they have been constantly diversifying their offering, further deepening the social and cultural role that they play in serving their communities.

...and community ownership can help to save some but it isn't always the right solution.

- London's small group of community-owned pubs provide a meeting place, a wide range of services to their users, and a route to sustainable operation.
- But London's high land values and sheer range of options go some way as to explaining why community ownership has not been more prevalent so far.
- More could be done to strengthen community rights and to provide the finances and management structures that help retain pubs for their communities.

To help London's pubs survive, recover, and thrive in the future:

- London government should continue to recognise the importance of pubs to Londoners, and should explore the potential for requiring more in-depth assessments of potential viability before permitting change of use or demolition.
- The government should continue to require full planning permission (rather than allowing permitted development) for pubs, to avoid permanent loss of those which may be viable in the future.
- The new London Plan proposal to shift responsibility for mitigating the effects of existing noise and other nuisances to developers moving in – the 'Agent of Change' principle – should be enforced and applied.
- National and London government should do more to assist community groups wishing to purchase under-threat pubs, such as converting the 'community right to bid' to a 'community right to buy', including through the new Community Ownership Fund.
- London government and boroughs could also play a matchmaking role, helping to connect community groups who want to take ownership of their under-threat pub with potential tenants who could run it.



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“There is nothing which has yet been contrived by man, by which so much happiness is produced as by a good tavern or inn.”

Samuel Johnson, 1776

Introduction

On the eve of the pandemic, the historic London pub was famous around the world, with over half of international visitors to the capital visiting one during their stay.¹ London’s public houses were also loved by Londoners – around three quarters of Londoners used pubs, primarily to socialise with friends, family and colleagues. The same percentage believed pubs to be important to London’s cultural heritage.²

London’s pubs were also changing. To stay competitive, many had expanded beyond their traditional focus on drinking and the clientele this attracted, becoming more inclusive and active community spaces, with a wider, but equally crucial role in the contemporary city’s cultural and social life.

But London’s pubs were also disappearing, even before the COVID-19 pandemic. The capital lost more than a quarter of its pubs between 2001 and 2017. The year 2016/17 saw pub closures at a rate of more than one every week.³ A range of causes were suggested, but no one seems to truly understand why this was happening.

Then the coronavirus crisis struck. Hospitality has been hit particularly hard. It is likely that many pubs will not survive. And yet, as successive lockdowns in 2020 necessarily bred loneliness and isolation, our shared social spaces have never seemed more important.

This is the perfect moment, then, to consider the role that London’s pubs play in our communities, and how best to prepare for what might come next.

About this paper

This paper is the result of desk-based research alongside the findings of a roundtable event, held on 9 December 2020, and a series of adhoc interviews. The roundtable was supported by Power to Change and brought together publicans, practitioners and local government to think about what challenges and opportunities exist for London’s pubs, the broader community role of pubs, and what London’s pubs need to survive the pandemic and beyond. A list of those people who attended the roundtable or were interviewed for this research can be found below. We are very grateful to those who shared their insights. The synthesis of the background research and views expressed are the authors’ own, however, as are the conclusions and summary, and so should be treated and attributed as such.

Roundtable attendees and interviewees

- **Hannah Barrett**, Plunkett Foundation
- **Tom Barton**, Power to Change
- **Paul Broadhurst**, Greater London Authority
- **Tim Coomer**, Coop Financing
- **Pauline Foster**, The George Tavern
- **Alex Green**, Black Cap Collective
- **Andrew Green**, British Beer and Pub Association
- **Nick Hallaway**, Antwerp Arms
- **Peter Haydon**, Them That Can Ltd
- **Garry Hunter**, The Tommy Flowers
- **Mark Inger**, Greater London Authority
- **Anthony Miller**, Pub is the Hub
- **Rob Star**, Electric Star pubs
- **Geoff Strawbridge**, CAMRA



TRU

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BEERS
AND ALES
LONDON BREWERS
SINCE 1888

Traditional Ales & Lagers

TRU

"Change your hearts, or you will lose your Inns, and you will deserve to have lost them. But when you have lost your inns, drown your empty selves - for you will have lost the last of England."

Hilaire Belloc, 1912

1. Why are pubs disappearing in London?

In response to the alarming rate of pub closures in London, Mayor of London Sadiq Khan made the issue a priority, describing the new London Plan as 'the most pro-pub planning strategy the capital has ever seen', establishing a 'Culture at Risk' office, and conducting an annual 'pubs audit' to measure progress.⁴

The exceptionally high closure rate of 2016/17 has since calmed. The following year was described as a 'year of stability', with a small increase in numbers overall, and growth in some (mainly inner London) boroughs.⁵ But many boroughs saw a further reduction in numbers. And we still don't fully understand why so many pubs were closing, and therefore what can be done to help.

Whilst closures are frequent, employment in London's pubs has actually increased since 2001, with a rise in the number of large establishments compensating for the rapid decline in 'small' pubs (those with 10 employees or less). There is also significant variation in the borough-to-borough picture – some have seen an increase in numbers, whereas others have seen a sharp decline. The ONS has found that, nationally, 'Outer City areas' have seen the biggest declines in pub numbers, with Barking and Dagenham, and Newham highlighted as national examples.⁶ However, the picture across London is nuanced, and a clear inner/outer London pattern is actually quite difficult to discern.

The decline in the number of pubs is a national trend but it appears to be particularly acute in the capital. Data tracking the reasons for pub closures listed nearly half of such closures as occurring due to demolition or for 'unknown' reasons. And what happens to these pubs post-demolition is not recorded.⁷

Our roundtable participants noted that some of the issues facing pubs in the capital are long-term, systemic and shared with the rest of the UK. From taxation and business rate valuations, to the smoking ban and supermarket pricing, pubs across the country have been facing a combination of gradual economic and social changes and sudden, dramatic legal changes that have made it increasingly difficult to operate.

But there are London-specific factors too. Some closures are part of a longer-term decline in the capital's high streets, a trend hugely accelerated by coronavirus, but already underway beforehand. Poor lighting and public

realm can be a factor in making high streets unattractive or unsafe at night, driving footfall down, and incorporating residential properties into high streets can complicate their successful night-time functioning as social spaces.

London urgently needs more housing, but new developments can impact on the ability of pubs to operate successfully, with noise and nuisance complaints more likely even without operating late at night, though the Mayor's 'Agent of Change' policy, which makes the developer of new housing rather than pub operators responsible for any soundproofing or other mitigating measures required, is intended to reduce the risk posed by such complaints.

Speculative purchase by developers seeking to convert pubs into flats remains one of the greatest threats to pubs in London. Land values are high, and particularly so for residential development. Many pubs are simply worth more as flats. In 2011, the Parr's Head pub in Camden was bought for £500,000, sold on for £1.3 million once planning permission was granted for residential conversion, and eventually fetched £3 million as six separate flats.⁸

Changes to the planning system have since made it more difficult to convert a viable pub into residential units, including through limiting 'permitted development rights (which enable redevelopment without full planning permission) and enabling stronger protection for designated 'assets of community value'. Many local authorities have also sought to protect pubs in their local plans, unless the business can be proved to be unviable.

↓ The Antelope, Leyton



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Enforcement has been strengthened too. In 2021, it was confirmed that the owners of The Antelope pub in Leyton were to be forced to reverse work done to the building to convert it from a public house to 14 studio flats and a shop. The work had not received planning permission and the Planning Inspectorate found that the owners' attempts to preserve the pub before conversion had been inadequate.⁹ Whilst The Antelope demonstrates that the system can intervene to save pubs, it also demonstrates the powerful incentives that London's high land values generate for owners.

Our roundtable participants felt that the viability test for pubs was potentially helpful, but the mechanisms for testing the viability of a pub are not felt to be strong enough. Ultimately, it is the premises rather than the occupier that are tested. Pubs can be closed where another owner could potentially have made a success of them, and there is a feeling that owners can deliberately run down a pub in order to make it appear 'unviable'.

The ability to designate pubs as ‘Assets of Community Value’ is also welcome, but ultimately the protections this provides – principally, the right for communities or local authorities to purchase pubs that have been given this designation – are felt to be relatively toothless. Taking a pub into community ownership is costly and extremely financially risky, and new pubs are especially vulnerable to short-term shocks.

Interviewees also highlighted the importance of ownership issues. Pub companies can protect against the risks involved in owning a pub by owning several: this is also true of small chains. But ‘tied’ pubs (where owners require operators to buy at least some of their beer from a particular brewery or pub company) can be extremely difficult to run and make viable. And the sheer scale of the big pub companies can mean that ownership is remote from the neighbourhood which a pub operates in, and therefore lacks understanding of local need and demand. Just as worryingly, this gap between owner and operator appears to be growing.

London’s changing demographics, and generational changes in how people like to spend their leisure time, also mean that the capital’s pubs have to be much more diverse in their offering, and react to changing local needs and opportunities, if they are to survive.

2. The impact of coronavirus

The pandemic has brought restrictions on meetings indoors and out, and has seen pubs forced to close, reopen, recalibrate and adjust to new rules, only then to close, and re-open again, most recently for outdoor table service only, but with the aim of fuller re-opening in May 2021. This has caused huge difficulties for hospitality in general, but arguably pubs in particular. Whilst the crisis has seen pubs back in the news, the news has mainly been bad. The British Beer and Pub Association estimated that 90 per cent of UK pub staff were on furlough at one point in the crisis.¹⁰ Many pubs are struggling, and it seems likely that many will not survive.

London’s pubs have been particularly hard hit: takings for July 2020 were down 10 per cent more in the capital than the UK average.¹¹ In September 2020, when pubs and restaurants were open again, sales were 28 per cent below the previous year’s, compared to a small increase across the country.¹²

Business rate relief and the furlough scheme have helped, and VAT discounts and ‘Eat Out to Help Out’ offered some limited help to pubs serving food, but not ‘wet-led’ pubs. The more recent offer of a £1,000 grant for such pubs over the Christmas period also seemed unlikely to prove adequate to sustain them through a long winter. Our roundtable participants pointed to the time, money and expense incurred in making pubs ‘covid-secure’, damaging the viability of those pubs which have been able to open even when permitted to do so in 2020/21.

One specific factor in the capital has been that central London’s economy has been hit especially hard. Even when the economy ‘reopened’ in summer 2020, workplace trips and footfall remained significantly down in central London, compared to pre-pandemic levels, and compared to other world cities.¹³ The collapse of both tourism and commuting, alongside a reduction in non-essential travel into central areas, meant that city centre pubs have struggled. That so many pubs in the City of London, for example, are ‘wet-led’, with little space and no capacity to provide food, has compounded this problem. Early signals suggest that April 2021 saw a sharp rise in footfall in the West End of London, but levels are still some way below where they were pre-pandemic.

Outer London pubs tended to do better. Londoners' new working and living habits mean that some outer London pubs have the potential to draw in more customers, especially during the traditional working week, once lockdown measures are lifted. It is possible that we will see a 'rebalancing' towards outer London, at least in the short-to-medium term. The future of central London's pubs is especially uncertain.

Whilst many pubs have attempted to adapt and to further diversify their offering during the periods in which they have been permitted to open in between lockdowns, many found this impossible, and simply stayed closed throughout.

Interviewees considered that the government's legislation and guidance towards pubs has been inconsistent, often short term in its nature, and frequently poorly communicated, causing confusion as well as practical difficulty in making pubs covid-compliant. It has not always been clear as to what is guidance and what is a legal requirement. There is a sense that the guidance has also been driven by public opinion or presentational concerns rather than a practical understanding of how pubs really operate, and how this affects customers.

Both roundtable participants and interviewees expected that when the government's furlough and other support schemes come to an end, there will be a great deal of fallout. A large amount of loan finance has been provided, and it is likely that these debts will increase insolvencies. Many pubs operate at extremely tight margins, and struggle to build up reserves. Those without large reserves have struggled to stay afloat in the pandemic. It seems likely that there will be many casualties and many independently-run or small-chain pubs that will be taken over by larger chains.

3. The changing community role of London's pubs

Londoners mainly use their pubs to socialise with friends, family and colleagues. Many pubs serve their local communities, providing a social space for patrons to interact. Others serve non-geographical communities brought together by shared interest, from fans of particular football teams to LGBTQ+ groups, vegans, theatre fans and those with pets. Pubs theatres have a long tradition.¹⁴ Live music has also been a longstanding offering, albeit one that has been increasingly under threat in recent years.¹⁵

But in a competitive marketplace, many London pubs have broadened their offer further. This is often intended to make better use of space. But in doing so, their role in serving their community has also in many cases been enhanced. Some offer parent-and-baby lectures for new parents.¹⁶ Life drawing classes, parent-and-baby cinema, and yoga sessions can now be taken in pubs.¹⁷ Glass blowing and knitting sessions are amongst the more creative, and unusual, pub-based offerings.¹⁸ The pandemic has even seen some pubs advertise themselves as flexible office spaces for remote workers, providing a social atmosphere for otherwise isolated home workers seeking a change of scenery.¹⁹

But some pubs simply offer a recognisable face and a friendly ear for their regulars. This is a much under-appreciated social role, and hugely important to some Londoners, particularly older Londoners. Pubs help to combat loneliness. And a 2016 survey found that one in five adults in relationships met their partners in pubs: nearly a third said that their local pub was a good venue for a first date.²⁰ Some pubs provide vital gathering places for marginalised groups, and can be places where relevant information is shared and messages communicated to specific communities.

Roundtable participants noted that the ‘local’ still meant something in London. Whilst choice means less loyalty to a single ‘local’ in some areas, this is far from the case in all of the capital’s neighbourhoods. Many London pubs do still play an important social role in connecting local communities through one shared space. And there are certainly a great number of London pubs that have much in common with village pubs, serving London’s numerous ‘village’ neighbourhoods. This can be seen in the hyper-local charities that many pubs collect for, for example. Pubs remain vital social infrastructure in many places in London, just as elsewhere, even though this value is not always reflected in the economic and planning policies that affect them.

The balance between serving existing, local communities, and enticing newcomers and those from outside the immediate locality (or ‘community of interest’) can be challenging for publicans, but it is attainable and important if a pub is to succeed. This is why it is so important that operators are trusted by owners to make decisions that suit their particular circumstances. Space is a limited and precious resource in the capital, and thinking about a pub’s space creatively can yield great results. Being bold and thinking from first principles was seen by interviewees to be wise advice.

Many of the services, events and entertainment mentioned above are seen as ways to ensure viability but also to further bring people together and foster a sense of community. Libraries and computer literacy courses can be run from pubs. There were examples of community pubs with kitchens hosting food banks and organising ‘meals on wheels’ for those in need during the pandemic. This was particularly true of community-owned/community-run pubs – which are dealt with next.

4. Community ownership models in London – challenges and possibilities

Pubs can be listed as ‘Assets of Community Value’, giving communities the right to bid to take over and run them. Community pubs are owned by their members, run democratically, and can help to save under-threat pubs from vanishing or being repurposed.

Community ownership is by no means the only way to ensure that London’s most precious community pubs are saved from extinction, but roundtable participants agreed that it could play an important role in specific cases. To date, there has been relatively little take-up of community ownership in the capital, with a few notable exceptions. The Ivy House in Nunhead and the Antwerp Arms in Tottenham provide evidence that such ownership models can succeed in the capital. The Tommy Flowers in Poplar, a new community pub with an arts focus, benefitting from lottery funding and premises provided by social landlord Poplar HARCA, also provides evidence that different models can also work.

But community groups often struggle to raise the funds necessary to take over an otherwise doomed pub. The amount of money required is notably higher in the capital, and whilst this can be offset somewhat by the fact that London provides a larger pool of potential funders, and possible access to affluent locals, this equation is not always balanced. In addition, the likelihood of community groups forming and coming together can be compromised by the issue of the capital’s density and choice.

When one pub closes, there are often several more nearby that can take its place, unlike in smaller rural communities where the village pub may be the only option for many miles.

But as highlighted earlier, Londoners love their pubs, and there are many cases where potential closure has elicited community campaigning even if this has not resulted in community ownership. Different models could be explored too. Existing examples have tended to see community groups run the pubs they take over, but there is no reason why the community could not take control of the asset and bring in a tenant to run it. Running a community-owned pub would not be without challenges for a tenant, but with a supportive community the experience could give a tenant a lot more scope to innovate and develop their business than in a tied pub.

But finance remains an issue. Whilst measures like co-operatives and community ownership could provide a way of saving important community pubs across the capital from vanishing forever, it is difficult to find sources of financing – ‘patient investment’ from people, pension funds and other forms of social investment are hard to come by, and London’s high land values do not help.



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† The Tommy Flowers, Poplar



"It is not just hundreds of thousands of jobs at stake here, or the billions of pounds contributed to GDP. The plight of pubs feels important because as well as an industry, pubs are part of our identity... Absurd as it may sound, being able to find a neighbourhood pub feels to me like something close to a birth right as a British citizen. If the AA is the fourth emergency service then, for many of us, pubs are the fifth..."

Clare Foges, 2020

5. Key findings and principles

COVID-19 has hit the hospitality sector exceptionally hard, and London's pubs now find themselves in a precarious situation. At the same time, recovery from the pandemic is prompting a re-appraisal of how we live, and a renewed focus on the value of shared social spaces. Pubs are not just places for the consumption of alcohol, but they are places where communities come together. They are an important part of the social fabric of the city, combatting loneliness and building social capital.

Below, we outline some of the principal findings and ideas that arose in our roundtable and the research that informed it.

The point of pubs

- Pubs provide an important social role and an ever-widening range of functions. Good quality food, indoor sport and games, theatre, cinema, exercise and even new skills training can be accessed in the modern London pub. Whilst the traditional 'local' does still exist in the capital, and plays an important social role, many new pubs are also becoming ever more inclusive and differentiated spaces, with an offering that is less exclusively male-centred. This is something to be celebrated.
- Having a more diverse offering, and a more inclusive and welcoming atmosphere, tends to improve a pub's chances of survival. But each London pub's offer must be carefully tailored to the needs and interests of its specific locality or the community that uses it.
- This makes it all the more important that the pub is owned and/or operated by someone who knows the clientele, and has the resources and the freedom to make decisions that work for that clientele, as well as opening the pub up to new visitors.

- The aftermath of the current pandemic could see pubs across the capital swept up by the largest pubcos and chains, and potentially lose what makes them great. Pubs, like government, work best when power and responsibility is devolved to as local a level as possible. It is in the interests of big chains, as much local owner-operators, to understand this.

Principles for policymakers

- London's pubs should be viewed and treated as vital social infrastructure, and protected wherever possible. Both London-wide government and the boroughs have made huge strides in actively recognising the importance of the capital's pubs to Londoners with additional protections, but there is more that can be done.
- Finding ways to perform more in-depth assessments of potential viability before permitting change of use or demolition is important – especially given the pandemic and the wave of pub businesses in trouble that seems likely to follow.
- In 2017, Permitted Development Rights were removed from pubs in the UK, meaning that it was no longer possible to change uses without applying for planning permission. This protection should be sustained, so that proper consideration can be given to pubs' viability.
- The new London Plan also highlights the 'Agent of Change' principle, shifting responsibility for mitigating the effects of existing noise and other nuisances to developers moving in, is another extremely positive move that must be enforced and applied.

Community ownership

London and national government could and should do more to assist community groups wishing to purchase under-threat pubs:

- The 'community right to bid' could be made a 'community right to buy', with grant subsidy provided to community bids, reflecting the importance of pubs to their communities. The 2021 Budget's announcement of a £150 million Community Ownership Fund is a welcome step towards this, though the sums available may have a more limited impact in areas of high property values.
- Alternatively, legislation could require a pub to be sold to community groups at a discount if it sits vacant for an unreasonable period of time.
- Ultimately, if pubs are to be recognised as a crucial part of the social fabric of the city, then mechanisms must be found for providing government-backed loans or other forms of finance to community groups wishing to buy (but not necessarily run) their under-threat pub. Public sector loan (e.g. through the Public Works Loans Board) are one avenue. A London-wide centrally-held 'pot' of funds made available for community ownership schemes, perhaps a 'London Community Pubs Corporation', could help to provide loans quickly and when needed.

- Developers may also be persuaded of the benefits of having a successful community-run pub as a shared social space near to or on future residential developments. In London, this could provide another source of potential loan funding to back community ownership.
- Government could also help by playing a ‘matchmaking’ role, helping to connect community groups that are seeking to take ownership of their under-threat pub but do not feel able to run it to potential tenants who would be able to do so.

Endnotes

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Authors

Jack Brown

Jack was a Research Manager at Centre for London until January 2021. He is Lecturer in London Studies and London Partnerships Director (Education) at King's College London. He is particularly interested in London's history, governance, and development.

Richard Brown

Richard is Interim Director of Centre for London, where he has worked on urban economics, housing, politics and governance projects. He previously worked at London's Olympic Park legacy corporation, and for the Mayor of London.

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Unit 1, 32-33 Hatton Garden
London, EC1N 8DL
T: 020 3102 3767
hello@centreforlondon.org
centreforlondon.org
Company Number: 8414909
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