



Bond Street | Oxford Street | Regent Street

# Covid 19 – West End Reopening & Recovery

SEPTEMBER 2020

# Executive Summary

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Following our update in July, this report sets out **New West End Company's** activities over the summer and our programme for the remainder of this year which has been approved by the Board. We continue to focus on the **West End's reopening** and **resilience** and encouraging customers to return. We are acutely aware of the Central London challenge with staggering low visitors, few office workers returning and very few tourists.

Although we have seen a **65% increase** in footfall since reopening (from a base of **80% drop** on 2019 footfall) current trading levels are not sustainable, and we will require further campaigns to boost customer demand and policy measures across retail, leisure and real estate for many businesses to remain viable into 2021 and beyond. (See insights page 10).

**New West End Company** continues to advocate at all levels of Government for both operational and fiscal measures to **support West End businesses** and our positions can be summarised as follows:

- 1. Public Information:** Clear and available daily information on the safety/risk posed by the virus on a local level to address public concern i.e. **how safe where I am, safe where I am going, safe when I get there;**
- 2. Scientific Guidelines:** SAGE to advise on **social distancing relaxation** on the tube, taking into account world city comparisons with a view to increasing numbers of passengers e.g. up to **50% capacity** by the end of September;
- 3. Business Lifeline:** Keep businesses afloat for next **18 months**; in particular in London's International Centre where sales are almost **£5bn** from overseas visitors. The urgent need to clarify the extension of the business rates holiday in key areas/sectors reliant on tourism;
- 4. Boost Recovery:** Have legislation in place to **increase international visitor numbers and spending** – **EU Tax Free Shopping** to boost visitor demand from Europe to support retail, hospitality & leisure businesses;
- 5. Messaging & Incentives:** Unambiguous and unwavering instruction from **Mayor and Prime Minister** to go back to work and use public transport safely for the **West End** to survive – **A Shop Out to Help Out** equivalent this autumn;
- 6. Local Planning & Licensing Relaxations:** Continuation of the **relaxation of planning and licensing for outdoor trading**, temporary uses and traffic movement changes to prioritise pedestrians while social distancing remains in place.

To follow are highlights of our recent activity and forward programme.

# BID Levy Payments 2020/21

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Our Board concluded in July, following feedback from over **100 members** from our Management & Steering Groups, that **New West End Company** can offer a deferral for BID levy payments but not a discount for **2020/21**. Earlier this year, **£2m** in costs savings were made by the business whilst increases in security and cleaning were undertaken during lockdown and reopening at the request of members. Recovery marketing initiatives are now running along with our **insights reports** and **advocacy campaigning**. The Board also made the decision to hold some reserves for recovery, a second wave or lockdown.

We fully understand the financial pressure many of our members are facing. We really appreciate and thank members who have paid their annual BID levy. As a not-for-profit partnership with our own liabilities and financial commitments to suppliers and staff members, we ask that if you have not yet paid, that you make arrangements to or agree a payment plan with us.



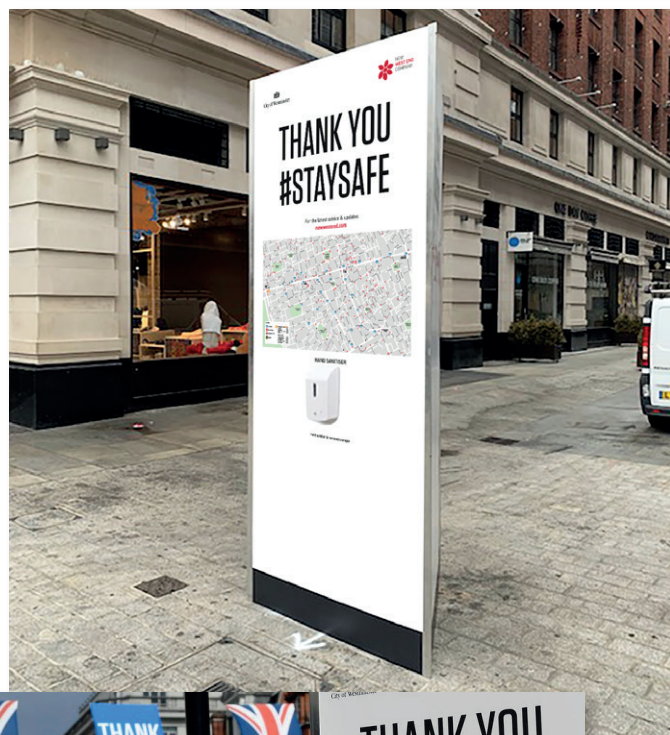


# COVID Secure District

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We are providing our customers and colleagues re-assurance of a **COVID secure district** with enhanced management and services when visiting, which is fundamental to our recovery. We continue with:

- Our visible enhanced cleaning, sanitisation spots and face mask distribution
- High 'visible' deep cleaning of the West End on a regular basis
- Increase of our security personnel and dog patrols 24 hours a day 7 days a week
- Supporting members crowd management and queuing protocols
- Resilience plans in place with businesses and authorities should a local lockdown be enforced





# Public Realm & Green Infrastructure

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There are a range of temporary measures that have been installed across our district, working with the **City Council** and major property owners, to ensure **visitor safety** with **social distancing** in place. We continue to work with partners to:

- Seek **permanent installations** and interventions that **prioritise pedestrians** and provide increased **green infrastructure** (i.e. secure bicycle & e-scooter parking, electric vehicle charging points) along with enhanced public realm for **outdoor dining areas** and **transport hubs**
- Improve our **walking** and **cycling** infrastructure
- Advocate to **increase these enhancements** and funding for their capital works
- Partner **Westminster City Council** and property owners on **freight & vehicle reduction** schemes
- Complete the installation of our public **WIFI** with **Bond Street** launching this autumn



# Recovery Customer Marketing

Our district-wide recovery campaigns are designed to **boost consumer confidence** and **attract footfall** back to the **West End** in the lead up and through to our peak period at Christmas. Without a major shift in Government policy on **social distancing**, **overseas quarantining** and an **effective treatment/vaccine** for COVID, we will continue to trade sub-economically. Our package of promotions and activations shared with members in our **Welcome Back Pack** aims to encourage our London and UK domestic customers to return. We will continue to work with partners to:

- Deliver a series of district campaigns and services focussed on building customer confidence and reasons to visit including:
  - **My West End** Radio campaign with **Heart FM & Capital** incentivising **West End** summer trips
  - **West End Club** App launched with **offers/experiences** exclusively for workers in our district
  - **Inside/Out** Promoting **Art & Cultural** attractions outdoors this autumn with **Royal Academy**
  - **West End App** Wayfinding across district with **car parking & cycle offers** and walking routes
  - **Destination Promotion** Always on messaging 'things to do' through digital & social channels
  - **American Express** Dedicated UK domestic campaign encouraging **West End** visits & spend
  - **Community Christmas** A two-month celebration of our UK 'Frontline Heroes' of 2020
  - **Traffic-Free Regent St** Supporting **The Crown Estate** with shopping events this Christmas
- Maximise the **West End & Mayfair** district promotion through our **Tourism Partnerships** with **London & Partners**, **VisitBritain** and the **GREAT Britain Campaign** to maintain a strong share of voice in their recovery campaigns both UK and overseas
- Use our regular UK consumer pulse surveys to understand **motivations and barriers** to visiting the **West End** and the propensity to spend in retail & hospitality to inform our messaging and share these insights with members. (See page 10)

WEST END CLUB

WEST  
END  
CLUB

heart  
106.2

95.8  
CAPITAL  
FM  
LONDON'S NO.1 HIT MUSIC STATION



## IN THIS PACK

### 1. Advocacy & Communications

- New West End Company advocacy campaigns to support the recovery for our retail and leisure businesses
- Communications programme to promote our advocacy and customer confidence agenda

### 2. Initiatives & Activations

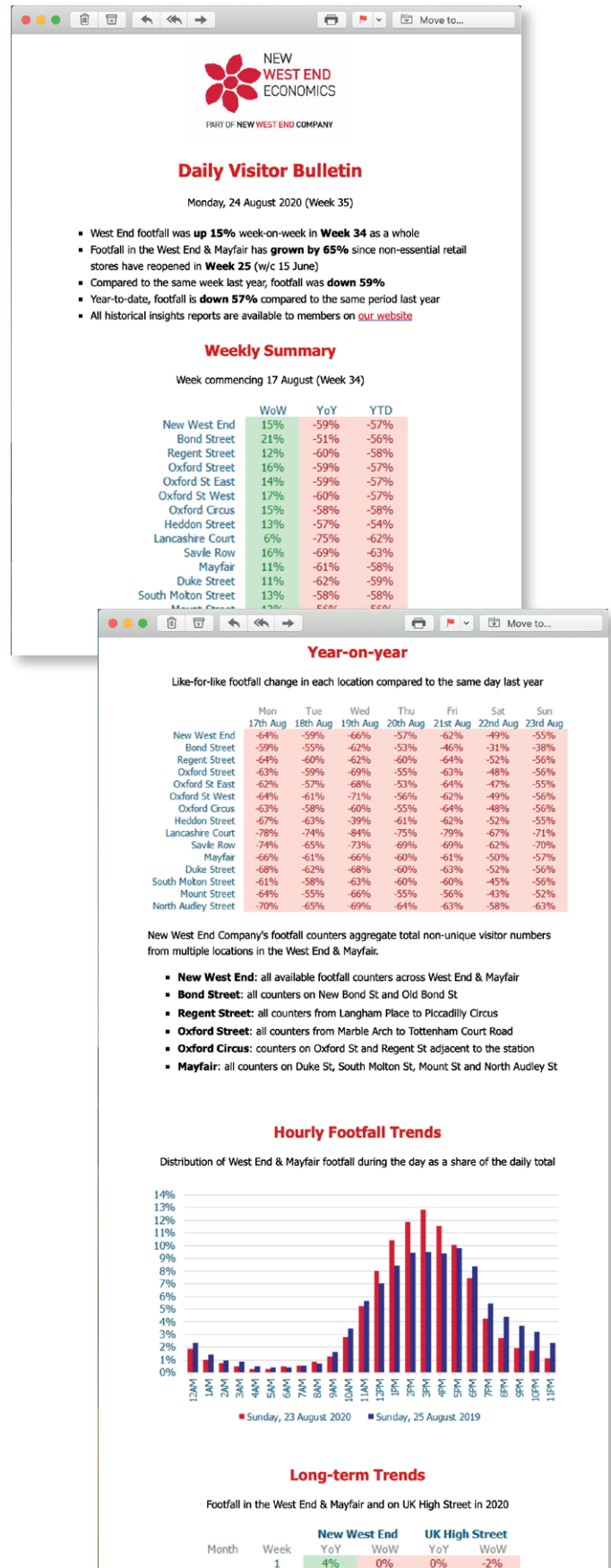
1. Re-engagement and Reassurance: driving customer confidence and footfall
2. Product and Promotion: driving customer interest and intent to spend
3. People and Place: customer connection and advocacy



# Member Insights, Communications & Guidance

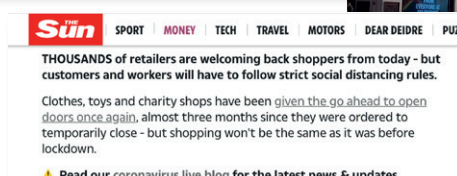
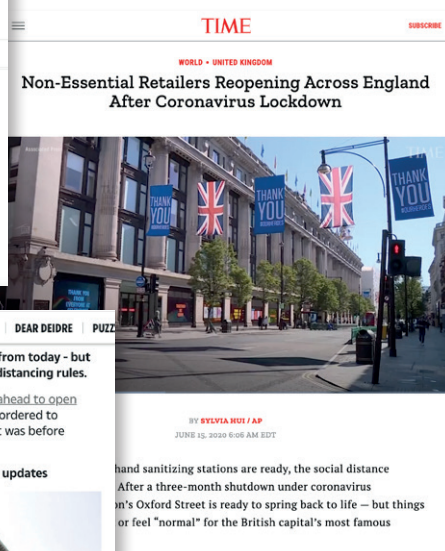
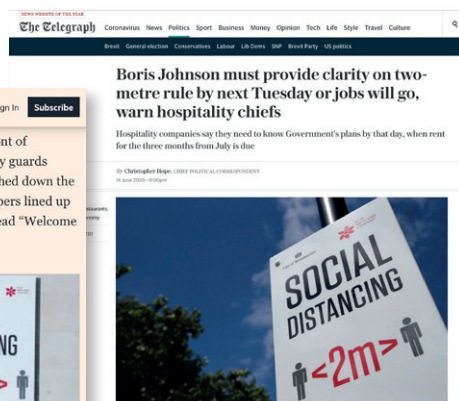
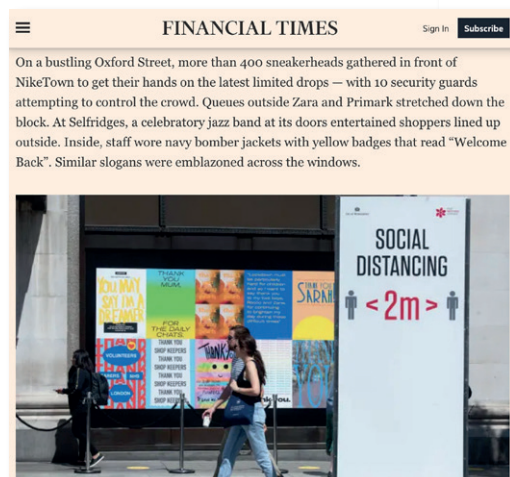
As we move through our recovery phase, we will continue to convene our **600 businesses**. We will:

- Coordinate key periods such as Christmas trading hours and crowd management/security for **Black Friday & Boxing Day**
- Continue to provide regular **email updates and briefings** with our latest footfall figures, Government guidelines, operation and resilience plans i.e. local lockdowns
- Hold regular **Management & Steering Group** sessions to share business insights, recovery responses and updates on our lobbying activity
- Re-instate our **PwC insights programme** from October providing **West End footfall, sales, Tfl travel and consumer trend** surveys and forecasts from both airlines and hoteliers as we move into 2021
- Hold our monthly **West End Resilience LIVE** sessions with **Microsoft** to continue to keep our members and wider partners engaged in our strategic agenda and operational programmes
- Bring business leaders and policy makers together to develop **New West End Company's** responses to major industry shifts across; **office market, retail & leisure and sustainable tourism**



# Advocacy & Campaigning

We continue to lobby our policy makers and promote our case in the media on behalf of our members on a range of measures that will support the West End's recovery and resilience to grow again in the future. In the past six months we have generated over 500 pieces of coverage with £2.7 million in UK and global media value with around £1.7m focussing on our COVID-19 response.



Signs have been put up around town to remind shoppers to social distance. Credit: AFP or licensors

Retailers have to make sure they're "Covid-19 secure" by implementing government list of measures that will slow the spread of the virus. The rules will be similar to those adopted by supermarkets, which allowed to stay open during the lockdown as they are considered



BBC

sky

itv

EXTRA 4  
TODAY

Bloomberg  
TELEVISION



# Advocacy Results Summary

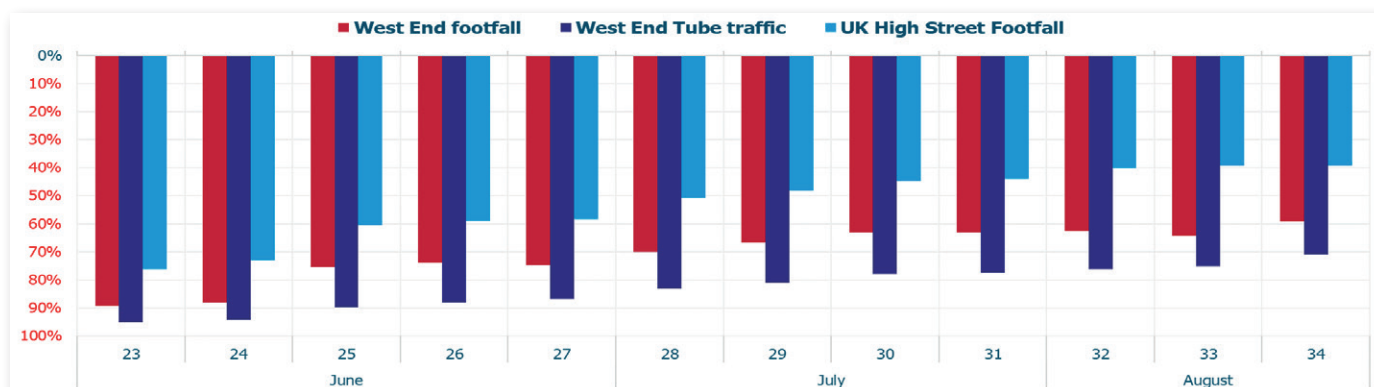
## KEY:

- Asked for & achieved
- Asked for & still pushing

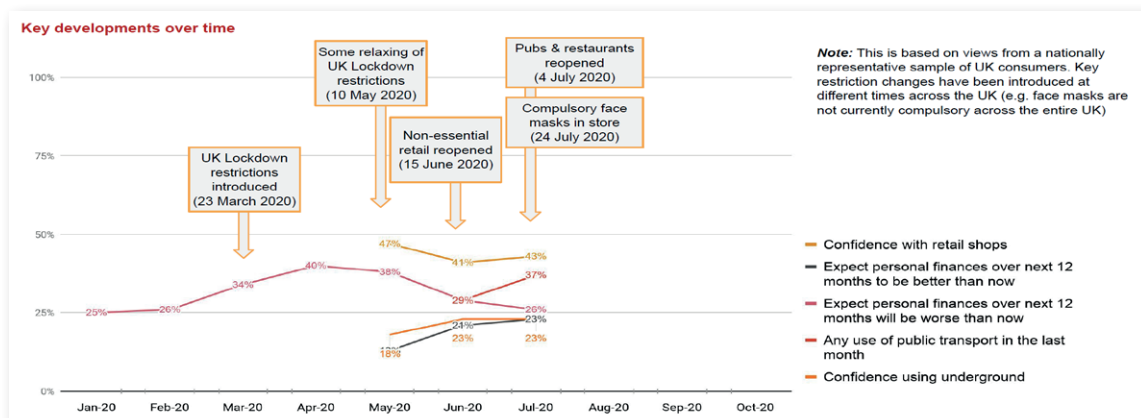
<b>Lockdown Support</b>	<ul style="list-style-type: none"><li>■ Worked with trade association to <b>win business support</b> measures, specifically the <b>business rates holiday</b> and the <b>furlough scheme</b>.</li><li>■ Provided <b>additional security</b> throughout the lockdown period.</li></ul>
<b>Reopening Support</b>	<ul style="list-style-type: none"><li>■ Contributed to Government guidance on <b>reopening of non-essential retail and hospitality</b>.</li><li>■ Created a re-opening guide for <b>West End</b> businesses.</li><li>■ Prepared the <b>West End</b> for reopening with public health measures and street banners.</li><li>■ Worked with the <b>Government</b> and <b>Westminster City Council</b> to ease planning and licencing regulations, to allow greater use of <b>outdoor space</b> for hospitality during the summer.</li><li>■ Advocating for more positive and direct messaging from <b>Government</b> to restore consumer and employee confidence.</li><li>■ Advocating for <b>TfL</b> to provide <b>greater capacity</b> on public transport system.</li></ul>
<b>Longer-term Recovery</b>	<ul style="list-style-type: none"><li>■ Ongoing campaigns with <b>Government</b> on key policies for long-term recovery including:<ul style="list-style-type: none"><li>● <b>Tax free shopping</b> extension to visitors from the EU (worth <b>£1.4 bn</b> in additional retail sales annually).</li><li>● <b>Sunday trading</b> extension (worth <b>£260 million</b> in additional sales annually).</li><li>● <b>Easier visa</b> application process for <b>Gulf States</b> visitors.</li><li>● <b>Long term</b> business rates reform and <b>extended support</b> in the medium-term.</li></ul></li><li>■ Full opening of <b>Elizabeth line</b> at earliest possible time with transfer to <b>TfL</b> to start running as an operating company only, with firm agreement on timeline and costs between the <b>Mayor &amp; Department for Transport</b>.</li><li>■ Commitment from <b>Westminster City Council</b> to the <b>£150 million Oxford Street District Transformation</b> and a seat on the Partnership Board.</li><li>■ Secured <b>£470,000</b> BID support from <b>Government</b> and deferred BID ballot.</li></ul>

# West End Trading Trends & Forecasts 2020

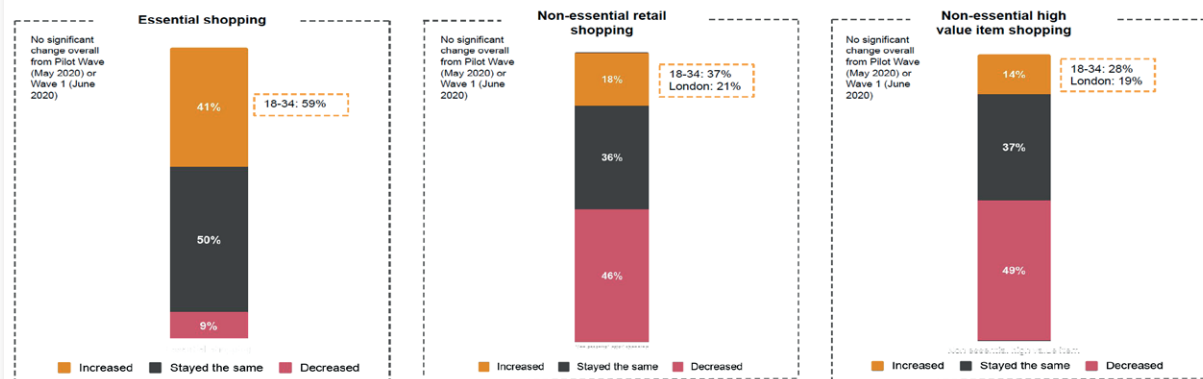
## FOOTFALL WEST END/UK WITH TFL DATA



## PULSE & CONSUMER SENTIMENT SURVEYS

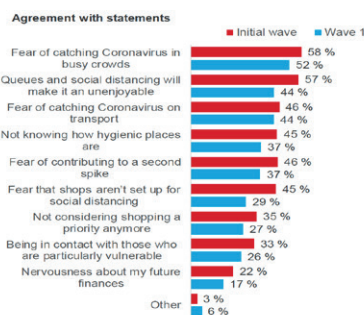


## In the last month, has your overall spending for essential and non-essential items increased, decreased or stayed the same?



## There has been a positive shift for retail

Barriers to shopping are reducing with initial hygiene concerns becoming less of an issue.



Source: London & Partners

Q29. On June 15th, many shops and retail spaces re-opened in the UK. Since then, have you returned back to similar shopping behaviour before Coronavirus? Base: Initial phase 2002, Wave 1 1,601 Q29. What is preventing you from returning to your old shopping habits? Base: Initial phase 1344, Wave 1 907

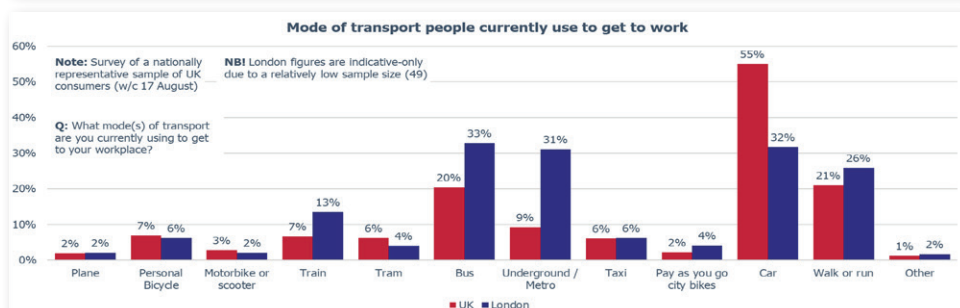
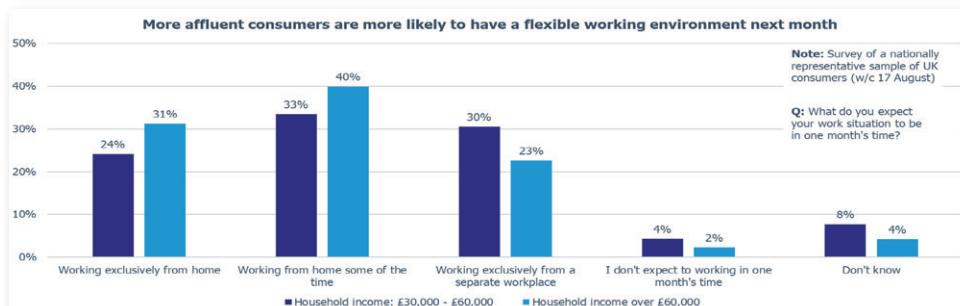
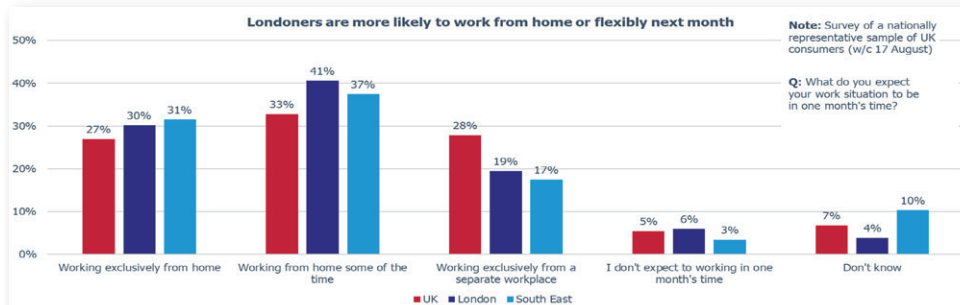
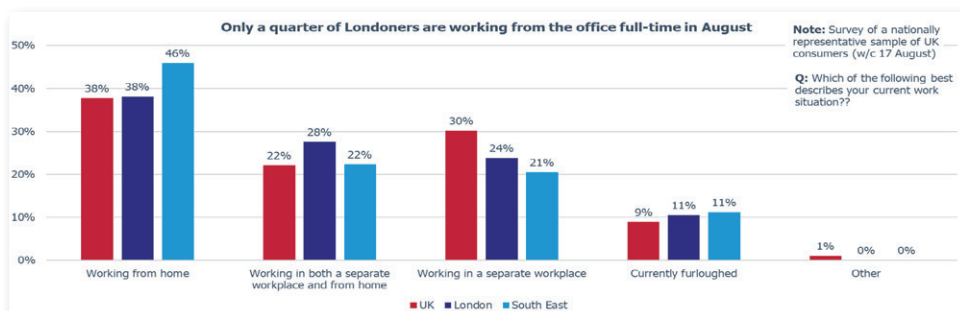


# West End Trading Trends & Forecasts 2020

## FORWARD FORECAST AIRLINE/HOTEL DATA



## RETURN TO OFFICE SURVEY



# West End Trading Trends & Forecasts 2020

## ELIZABETH LINE AUGUST 2020 UPDATE

