

# Heart of London Business Alliance

## SWOT Analysis



### ECONOMY

#### STRENGTHS

- ◆ Heart of London area has a Gross Value Added of £10B, 112,000 direct jobs, also generating business for supply chains and jobs to support the West End economy.
- ◆ 33% growth in Gross Value Added since 2019.
- ◆ The Heart of London area economy makes a disproportionately positive impact, creating 20% of the West End's total Gross Value Added, while covering only 12.8% of its area.
- ◆ The Heart of London area has an ecosystem of interdependent and diverse businesses, with the Arts and Culture sector securing customers for hospitality, food and beverage.

#### WEAKNESSES

- ◆ Current licensing and planning policy, along with the Cumulative Impact Assessment which includes Regent Street St James's, are focused on restriction and curtailment. This risks other competitor areas taking market share of audiences away from the Heart of London area.

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#### OPPORTUNITIES

- ◆ HOLBA's Investment Case shows that the Heart of London area could achieve an increase in local Gross Value Added of 122% and create at least 6,000 new jobs by 2040 by investing in the area's public realm.
- ◆ The new Labour government is focused on economic growth and is committed to simplifying and accelerating the planning system for infrastructure projects.
- ◆ They have also committed to improving workers' rights which could help with recruitment and retention.
- ◆ Forecast growth of London's population potentially creates additional demand for the Heart of London area's restaurants, cafés, hotels and shops.

#### THREATS

- ◆ The fall in the number of planning applications indicates that the growth of the West End economy may be slowing down.
- ◆ The rise in working remotely for part of the week has suppressed demand for some West End businesses, including lunchtime and evening food and beverage.
- ◆ The new Labour government's proposed changes to workers' rights could impact adversely on businesses.
- ◆ Footfall and spend have not fully recovered to 2019 levels.

# BUILT ENVIRONMENT, PLACE AND PUBLIC REALM



## STRENGTHS

- ◆ The West End has an attractive network of streets and lanes, which vary in scale and architectural style. Some are traffic-free and accessible with good wayfinding and connectivity.
- ◆ The many Listed Buildings are some of the most architecturally attractive, culturally rich and historically significant in the world.
- ◆ Historic architecture, vistas and landmarks such as Waterloo Place provide a unique world-class cityscape to enjoy 24/7.

## WEAKNESSES

- ◆ There are limited opportunities to create new traffic-free or green spaces or to widen footways.
- ◆ Streets are littered with hundreds of dockless bikes and unregulated pedicabs which block footways, make streets inaccessible and spoil the aesthetics, experience and reputation of the area.
- ◆ Older buildings are challenging to improve in terms of their accessibility and to retrofit to a high standard.
- ◆ The provision of amenities for workers has dropped since the pandemic discouraging workers from coming into the office.

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## OPPORTUNITIES

- ◆ HOLBA's placeshaping programme of 44 public realm projects would deliver growth of 14% in employment and Gross Value Added of 122% by 2040 (without these projects, growth would be restricted to 5% employment and 104% Gross Value Added respectively).
- ◆ HOLBA's Tenant Curation Plan would help retain and attract the best mix of ground-floor uses, enhancing and protecting the area's character and quality of experience for users whilst securing a material return on investment for tenants and landlords.
- ◆ The council's and The Crown Estate's "Park to Park" scheme includes proposals for Regent Street St James's, Piccadilly Circus and Haymarket and will create a traffic-free boulevard with a vista towards Waterloo Place.
- ◆ The "Park to Park" scheme fulfils several public realm projects identified in HOLBA's Placeshaping Strategy and incorporates the principles of our other strategic documents including the Cultural Strategy and Evening and Night-time Economy Strategy
- ◆ The new Labour Government has committed to simplifying and accelerating the planning system to unlock economic growth.

## THREATS

- ◆ Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- ◆ 65% of the Piccadilly and Jermyn Street District's office commercial space requires significant upgrades and investment to meet the legal minimum energy standards and net zero targets set for 2030. Unmet, this might lead to an exodus of businesses and their workers, leaving buildings empty and completely changing the face of the area.
- ◆ Whilst Westminster remains one of the busiest boroughs for planning, it has seen the largest relative drop in major applications (75%) between 2013-2023.

# ACCESSIBILITY & TRANSPORT



## STRENGTHS

- ◆ 87M journeys each year to the Heart of London area (2023-24) are directly served by five Tube lines and three Underground stations, including Green Park, Piccadilly Circus and Leicester Square.
- ◆ A night Tube service operates on Fridays and Saturdays, servicing the area's evening and night-time economy.
- ◆ The Elizabeth line at Tottenham Court Road and Bond Street brings up to 120,000 additional people to the West End every day.
- ◆ International visitors can be in the West End in 30 minutes from Heathrow via the Elizabeth line.
- ◆ There is a high volume of frequent bus services during the day and night. 11 different bus routes serve Piccadilly Circus, of which eight run 24/7.

## WEAKNESSES

- ◆ Piccadilly and Jermyn Street stations are not fully accessible.
- ◆ There is a complete absence of cycle routes in the Heart of London area which represents a significant gap in London's cycle network and impacts its ability to attract workers and some visitor markets.

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## OPPORTUNITIES

- ◆ The Elizabeth line brings up to an additional 65,000 people a day through Tottenham Court Road station, which is a significant potential target audience.
- ◆ HOLBA's public realm schemes would include new cycle routes and better pedestrian routes.
- ◆ In 2023 Regent Street attracted 71million visitors with spending of £1B. Completing construction of the Sackville and Vigo Street public realm schemes would encourage some of this footfall onto Piccadilly specifically and the Heart of London area more broadly.
- ◆ Changes to Piccadilly Circus must be future-proofed in the Regent's Park to St James's Park public realm programme to support step-free access to the station, which needs to be built when funding becomes available.
- ◆ Expanding and enhancing the provision of night-time transport options would facilitate growth in the evening and night-time economy.
- ◆ The new Labour government has committed to improving bus services and giving more powers to local leaders to deliver local transport systems that work for communities.

## THREATS

- ◆ Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- ◆ TfL only received 50% of its capital funding requirement from government last year, which will continue to negatively impact accessibility, affordability and safety of travel now and into the future.

# EXPERIENCE & CULTURE



## STRENGTHS

- ◆ The entertainment part of the West End is London's busiest night-time destination.
  - ◆ 4 out of 5 visitors come to London for its culture.
  - ◆ London's cultural and heritage assets are amongst the top three in the world.
- ◆ West End Arts and Culture Gross Value Added is estimated to be £4.8B, equivalent to 23% of all of London's Arts and Culture sector output.
- ◆ In 2023, theatres in the Heart of London area generated £238.4M in gross revenue, accounting for 24% of the total gross revenue across all Society of London Theatre (SOLT) members.
  - ◆ Heart of London area theatres attracted audiences of 4.2M, representing approximately one-quarter of the total attendance for all SOLT member theatres.
- ◆ The Heart of London area has a strong presence of arts and entertainment venues. It is home to:
  - ◆ 60 film premieres each year
  - ◆ 15 theatres
  - ◆ 4 casinos
  - ◆ 3 major galleries
  - ◆ 8 commercial galleries
  - ◆ 7 cinemas
- ◆ The Heart of London area is globally renowned for its experience alongside its unparalleled culture, entertainment and night-time experience (see section below).

## WEAKNESSES

- ◆ London is heavily dependent on international tourism (comprising 84% of the overnight market).
- ◆ A traditional, older and narrow demographic for the West End's arts and cultural offer.
- ◆ Current offer and occupier mix is not keeping pace with the latest trends which indicate consumers' preferences for culture and experience.
- ◆ Some street activities in the Heart of London area do not complement the identity of the area.
- ◆ Lack of comprehensive, cohesive and complementary programming of the cultural experience and offer resulting in a free-for-all that disappoints visitors.
- ◆ Street entertainment, although seen by some as a strength of the area is also seen as a weakness because it lacks process, management and fairness.

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## OPPORTUNITIES

- ◆ Designating the current Heart of London area as an International Culture and Entertainment Zone would give recognition to the distinct and unique role the area plays in the broader economy. It would allow for licensing and planning policy, cleaning, maintenance and safety regimes and regeneration plans to be tailored to allow the area to fulfil its full potential as a destination of global significance and help to drive critical investment into the area.
- ◆ A more proactive, positive and modern approach to digital screens would not only complement the needs of the evening and night-time economy but will ensure the area is relevant to its increasingly media-expectant consumers and investors.
- ◆ A single body, actively programming an annual calendar of celebrations and events complementary to the Heart of London area's core identity would attract huge investment and an increasingly diverse audience.
- ◆ Engaging cultural organisations and artists to collectively activate and promote the Heart of London area would present the area as a single destination of unrivalled variety and attraction.
- ◆ Leveraging the high-profile "brand" of the West End would generate additional activity from global brands, leading to increased visitor numbers and spend per person.

## THREATS

- ◆ Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- ◆ There is currently no creative industry strategy for London, which has contributed to Westminster losing 20% of its creative industries sector in the last decade.
- ◆ Rising costs, lack of venues and competition from other destinations.
- ◆ The growth of rival destinations, with dedicated investment and better, more modern and adaptable venues and spaces.
- ◆ Limited opportunities and platforms in the public realm for art.
- ◆ Arts Council England cuts have deeply affected the West End arts sector.
- ◆ In the past decade, London has lost 35% of its grassroots music venues and 58% of LGBT+ venues.
- ◆ Pressures on consumer spending, shifts in working patterns and a challenging international tourism market.

# EVENING AND NIGHT-TIME ECONOMY



## STRENGTHS

- ◆ The concentration and variety of entertainment available attracts workers and visitors to the area.
- ◆ Most night-time activity is clustered between the Leicester Square area and Soho, with a few late-night establishments in St James's and Mayfair, therefore residential areas are protected.
- ◆ Cultural venues, particularly theatres, cinemas and live shows in the evening and night-time are critical drivers for the wider ecosystem.
- ◆ Evening and night-time customer dwell-time and spend are higher where entertainment venues are located near complementary businesses which are open before and after performances.
- ◆ Piccadilly and Jermyn Street District is used by people throughout the evening and night-time to meet up, enjoy street performers, eat and people-watch, much as they do in the day.
- ◆ Iconic vistas, landmarks and open spaces are integral to the Heart of London area's character and that of the Heart of London area after dark and play important functional roles.

## WEAKNESSES

- ◆ The evening and night-time economy relies on a small geographic catchment area for visitors, with the percentage of night-time visitors coming from outside the city falling from 41% of the total to 38%.
- ◆ After dark, many of the large buildings and side streets negatively impact on the character and atmosphere of the public realm. They lack architectural lighting, active frontages and upper floor activity.
- ◆ The number and variety of places to go to after a show is limited and does not meet the demand.
- ◆ There is a lack of club and music venues in the Heart of London area.
- ◆ On Piccadilly, evening venues are far apart and fragmented. This leads to a loss of footfall and spend across the area.
- ◆ The council's Cumulative Impact Assessment restricts the ability of new venues to open later in the evening or night-time.
- ◆ The Cumulative Impact Assessment applied in isolation is an incomprehensive, ineffective and insufficient tool to generate and drive growth.
- ◆ The evening and night-time economy is often considered as negative by the council because its definition currently focuses on licensed premises which leads to a management and regulation, rather than an opportunity-focused outlook.

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## OPPORTUNITIES

- ◆ The pre- and post-theatre peaks are opportunities to attract audiences earlier and retain audiences for longer in bars, cafés, clubs and restaurants.
- ◆ Activating side streets and small spaces would provide an intimate and attractive alternative to larger night-time venues.
- ◆ Diversifying the offer would attract new and more diverse audiences.
- ◆ Relaxation of licensing regulations in a considered and curated way would allow the economy to grow, creating jobs and increasing tax receipts.
- ◆ Expanding the evening offer and extending opening hours in Piccadilly, where the evening economy currently is limited, would drive growth and greater return on investment.
- ◆ Expanding public transport provision would ensure the evening and night-time economy can access both the workforce and visitors it needs to succeed.
- ◆ Providing a positive planning policy framework would protect and enhance the evening and night-time economy venues and businesses.
- ◆ The council is developing an 'After Dark' Evening and Night-time Strategy to improve the nightlife in Westminster that looks beyond the raw data provided in the Cumulative Impact Assessment, with the aim that communities can be safe, sustainable, inclusive and accessible.

## THREATS

- ◆ Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- ◆ London has multiple established and emerging nightlife destinations including the wider West End to the South Bank, King's Cross, Hoxton, Shoreditch and many more across the city, creating increased competition.
- ◆ Current licensing and planning policy is focused on restriction and curtailment which risks other competitor areas taking market share of audiences.
- ◆ The evening and night-time economy has not fully recovered from Covid-related economic impacts; future threats include labour supply shortages, rising costs and reallocation of Arts Council England funding to areas outside of London.
- ◆ The lack of a 24-hour strategy for the borough has created a disjointed and stifling approach to the evening economy.
- ◆ There is a need to look at the entire economy including all sectors and users, considering infrastructure and provision that removes economic and social limitations and barriers and instead allows the area to operate over an entire 24-hour period.
- ◆ Concentration of uses overlapping daytime, evening and night-time, creating competition for the Heart of London area's limited space, which also increases additional pressure on transport services and the public realm, with footways -and sometimes carriageways- full of pedestrians.
- ◆ Crowding at bus stops and on night buses and insufficient staffing, with usually just the driver, despite the additional challenge posed by night-time increases in intoxicated and aggressive passengers undermines the visitor experience and their willingness to return to the West End. The frequency, reliability and safety of night buses is crucial to night workers, without whom the evening and night-time economy could not function.
- ◆ The rise of working from home to over 50% of Heart of London area office workers for part of the week has impacted the size of the near market for after-work activity.
- ◆ Night-time staff can feel priced out of the West End due to affordability of public transport, goods in retail and hospitality.

# SAFETY AND SECURITY



## STRENGTHS

- ◆ HOLBA's dedicated security team My Local Bobby to make staff and visitors feel safer and to deter, delay and detect crime, enabling a quick response to incidents and emergencies.
- ◆ From 2019, when HOLBA introduced My Local Bobby, to 2023, crime reported fell by 4%, while in the Core West End reported crime increased by 17%.
- ◆ Businesses receive a quick response and additional support when dealing with shoplifting and other criminal incidents, helping to minimise impact on visitors and staff.
- ◆ A strong track record in ensuring that the Heart of London area remains safe during numerous festivals, events and demonstrations, which have increased in frequency in recent years.
- ◆ Agreement with the police and the council to share sensitive information to resolve or prevent crime.
- ◆ Heart of London area security teams and businesses share a radio network, which facilitates sharing of live information on crimes and antisocial behaviour.
- ◆ 50% of people think the Heart of London area's safety is 'excellent' or 'good'.
- ◆ HOLBA provides a coordinated approach, working in partnership with our businesses, the Metropolitan Police, the council and neighbouring BIDs to tackle persistent crime, antisocial behaviour and street nuisance issues.

## WEAKNESSES

- ◆ Survey respondents said that antisocial behaviour is one of the worst aspects of the area at night, having a major impact on its appeal.
- ◆ Police funding does not fully take account of visitor numbers, which results in the Heart of London area being significantly under-resourced because our resident population is around 3,000 against 400,000 visitors every day.
- ◆ The lack of police presence is compounded by slow response times and low level of enforcement, e.g. offenders being apprehended, charged and successfully prosecuted.
- ◆ There are very few Westminster City Council enforcement officers in the West End, who are needed to enforce against breaches in council regulations such as illegal trading, litter-dropping and busking without a licence.
- ◆ Residents believe that antisocial behaviour and perception of safety worsens after 11pm.
- ◆ Day workers cited safety, crime, violence, rowdiness, street urination, drunkenness, harassment and perceptions of lack of safety among the worst things about the Heart of London area after dark.
- ◆ Antisocial behaviour, women's safety and safety in the public realm after dark were all highlighted as key challenges by visitors and residents.
- ◆ 24% increase in rough sleeping in 2023.
- ◆ Lack of HOLBA funding to deploy more security staff.
- ◆ Police response times not always adequate when requiring assistance.
- ◆ Poor security standards can create hazardous environments and put individuals at risk of a range of injuries.
- ◆ Leicester Square is highest in our area in terms of volume of notified crimes.

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## OPPORTUNITIES

- ◆ Political alignment at the national, regional and local level and manifesto commitments to prioritise crime reduction.
- ◆ The new Borough Commander's arrival could help reinvigorate partnership working between Westminster City Council, the Metropolitan Police, businesses and private security teams.
- ◆ A West End CCTV system, with a control room to monitor and respond to incidents, the capability to speak to people on the street and an enhanced street lighting programme would instantly reduce crime and fear of crime.
- ◆ The new government have committed to 13,000 more community police and PCSOs, cracking down on shoplifting and more antisocial behaviour measures.
- ◆ Training and workshops to empower businesses to deal with external threats to their employees and property.
- ◆ Effectively mobilising the Heart of London area crime-gathering database for logging and reporting incidents, which could be used to track trends to predict and prevent future crimes.

## THREATS

- ◆ Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- ◆ There is no Crime and Safety strategy for the West End across both councils.
- ◆ Police funding does not fully take account of visitor numbers, which results in the West End being significantly under-resourced.
- ◆ International visitor perception that the West End is unsafe at night-time.
- ◆ Lack of shared political responsibility and resources between public authorities.
- ◆ High visitor numbers make the Heart of London area appealing to opportunistic criminals and organised crime.
- ◆ High crime rates and poor perceptions of safety could trigger economic decline, falling property values and job losses.

# CLEANING & STREET SERVICES



## STRENGTHS

- ◆ The Heart of London area has additional street cleaning services funded by HOLBA provided by Veolia.
- ◆ According to a Keep Britain Tidy Area Survey in 2022, standards in dealing with litter and detritus were high and had increased significantly since 2018.
- ◆ The Heart of London area achieved 92% rating awarded from Keep Britain Tidy (4% better than the London average and 7% better than the UK average).
- ◆ Regular inspections and repairs of streetlights, benches, signage and public amenities in the Heart of London area ensure that they are in good working condition.
- ◆ Supporting daytime outreach services, which provide a social care response to help those sleeping rough on the Heart of London area's streets to access services and achieve a route away from rough sleeping.

## WEAKNESSES

- ◆ Basic council service provision is insufficient for the area's volume of footfall, traffic and its international status.
- ◆ No restriction on waste and recycling operators has resulted in circa 50 companies operating in the West End and not all operate ambitious standards of refuse collection or adherence to collection times.
- ◆ The area has a 24-hour economy which makes it difficult to clean the streets.
- ◆ The recent Keep Britain Tidy Area Survey demonstrated increased levels of graffiti and flyposting.

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## OPPORTUNITIES

- ◆ Opportunity to use autonomous vehicles to increase the frequency of street cleaning.
- ◆ Increase standards in the council services to meet the area's specific demands.
- ◆ Review street furniture, signs and bikes to deliver a programme of improvements to ensure that the Heart of London area is clutter-free.

## THREATS

- ◆ Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- ◆ Exceptional demand on management of the Heart of London area from 400,000 visitors a day, plus events, demonstrations and premieres.
- ◆ The lack of an enhanced cleaning regime could deter visitors, potential investors and businesses to the area. This could lead to a drain of visitors choosing other destinations and a consequent decline in property values and economic performance.
- ◆ Poor waste management can create negative public health issues.

# SUSTAINABILITY



## STRENGTHS

- ◆ An increasing number of Heart of London property owners and occupiers are making the necessary changes to buildings and their business operations to reduce carbon emissions.
- ◆ Partnership working with the council to promote net zero carbon support for businesses and the Sustainable City Charter.
- ◆ A pilot programme in the Heart of London area, funded by the Mayor of London and Bloomberg Associates, achieved up to a 22% reduction in energy use amongst participating businesses.
- ◆ The Heart of London area is benefitting from new planting schemes which support biodiversity.
- ◆ Street cleaning plays a vital role in reducing pollution and improving air quality, reducing particulate matter and contaminated waste from entering storm drains.
- ◆ Daily monitoring of environmental issues and reporting these directly into Westminster City Council environmental hotline.

## WEAKNESSES

- ◆ The area has many older buildings which are challenging to retrofit, which is more easily done when a building is unoccupied.

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## OPPORTUNITIES

- ◆ A Heart of London area-wide coordinated approach can contribute to the area achieving net zero and supporting sustainability, which is being led by HOLBA, involving businesses and the council.
- ◆ The programme of public realm schemes is an opportunity to introduce more trees and sustainable urban drainage to help build climate change resilience.
- ◆ The new Labour government has committed to more investment in clean energy and improving energy efficiency in buildings including commercial properties.

## THREATS

- ◆ Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are also available for the council to adapt to help other areas realise their potential.
- ◆ Changes to minimum energy standards, as measured by Energy Performance Certificates (EPCs), mean that 65% of the Piccadilly and Jermyn Street District's commercial buildings may not be lettable soon.
- ◆ Tenant businesses, staff, visitors and investors increasingly include sustainability in their decision-making, which could affect the area's ability to attract tenants for offices, visitors, experienced staff and inward investment.
- ◆ Increasing importance of sustainability rating as a principal factor for businesses choosing where to locate in addition to price and quality. The Heart of London area's EPC ratings need to improve to maintain the area's attractiveness to current and potential tenants, particularly for the office sector.
- ◆ Climate change and extreme weather could affect the ability of businesses to trade and willingness of consumers to visit the Piccadilly and Jermyn Street District.



# PUBLIC & STATUTORY SERVICES: COUNCIL SERVICES



## STRENGTHS

- ◆ Westminster City Council is responsible for the collection of business rates in the City of Westminster. As the largest business rate collector in England, it collects over £2B in business rates annually, mainly from West End businesses.
- ◆ Although just one of 33 rating authorities in London, Westminster collects over 25% of London's £8B total. This one local authority collects around 8% of the total business rates in England.

## WEAKNESSES

- ◆ Due to central government redistribution, Westminster keeps just five pence out of every pound it collects. 95% of Westminster business rates are redistributed by central government to be spent elsewhere.
- ◆ Piccadilly and Jermyn Street District businesses paying such substantial amounts of business rates find it hard to reconcile the level of business rates against the standard of services provided.

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## OPPORTUNITIES

- ◆ The council retains just 5% of the business rates and council tax that it collects annually. The remaining 95% goes to central government to be spent in other areas. This severely constrains the council's ability to invest in necessary services to meet the exceptional demands of the Heart of London area.
- ◆ The new Labour government has committed to giving mayors and other local leaders more say on economic decisions.

## THREATS

- ◆ Absence of a dedicated strategy for London's West End, resulting in an uncoordinated approach for the area including planning, licensing, digital screens, safety, sustainability, etc. HOLBA has stepped in to identify, fund and deliver strategies which are available for the council to adapt to help other areas realise their potential.
- ◆ Without government action, councils face difficult choices about cutting vital services, along with increasing council tax, fees and charges during a cost-of-living crisis.

# PUBLIC & STATUTORY SERVICES: UTILITIES – DIGITAL

## STRENGTHS

- ◆ Westminster is one of the most connected boroughs in London with over half of its total premises able to access full-fibre broadband.

## WEAKNESSES

- ◆ High density of Heart of London area businesses places high demand on digital infrastructure.

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## OPPORTUNITIES

- ◆ Develop and deliver a Digital Infrastructure Strategy for the West End, which could include:
  - ◆ Supporting the introduction of ultrafast fibre networks to buildings
  - ◆ Supporting the introduction of 5G network to the West End
  - ◆ Delivering connectivity without interruptions and losses to support the Heart of London area's key sectors, technology use and hybrid working
  - ◆ Harness Smart City technologies to better manage crime (see Safety and Security section), environmental performance and customer and visitor data.
- ◆ Provide enhanced digital security through leased fibre lines.

## THREATS

- ◆ Cybercrimes affecting businesses and inadequate digital security in the West End might lead to businesses relocating to other areas with enhanced digital security.

# PUBLIC & STATUTORY SERVICES: UTILITIES – WATER



## STRENGTHS

- ◆ Utilities companies in the Heart of London area have a well-established infrastructure to provide reliable services to residents and businesses.
- ◆ The West End has a high population density and many businesses, providing a strong customer base for utilities companies.

## WEAKNESSES

- ◆ Thames Water has an ageing infrastructure. This results in 24% of Thames Water supply (equivalent to 600m litres a day) being lost through leaks; the repair of leaks is disruptive to the Heart of London area road network, impacting on the visitor experience and ability of businesses to trade.

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## OPPORTUNITIES

- ◆ Water capture and harvesting can be built into public realm schemes, which would contribute to climate adaptation and resilience.
- ◆ Encourage Thames Water to invest in public realm schemes, specifically the water capture elements.

## THREATS

- ◆ Disruption to water supply due to current leaks and future climate change could affect the reliability of water supply.

# PUBLIC & STATUTORY SERVICES: UTILITIES – GAS AND ELECTRICITY

## STRENGTHS

- ◆ Utilities companies in the West End have a well-established infrastructure to provide reliable services to residents and businesses.
- ◆ The West End has a high population density and many businesses, providing a strong customer base for utilities companies.
- ◆ The West End has multiple utilities companies competing for market share, leading to pricing competition.

## WEAKNESSES

- ◆ Some utilities companies have aging infrastructure that could lead to service disruptions and maintenance issues.
- ◆ High demand for gas in Heart of London area buildings, and the net zero transition, means these buildings will need to be refitted with alternative, renewable heating and cooking energy sources.
- ◆ The busy, complex and multi-layered uses of the Heart of London area's built environment makes it highly challenging to repair utility infrastructure.
- ◆ Planned and urgent road works are disruptive and unsightly, affecting the visitor experience and ability of businesses to trade.

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## OPPORTUNITIES

- ◆ Collaborate with utility companies to deliver an accelerated buildings retrofit programme.
- ◆ Build-in power supply resilience, such as Power Purchase Agreements and on-site micro energy generation, such as solar and wind sources.
- ◆ Upgrade utilities as part of public realm schemes, bringing forward their scheduled renewal dates to align with public realm investment.

## THREATS

- ◆ The growth of the West End economy increases pressure on the power grid, which soon may require further upgrade to its infrastructure, including sub-stations.
- ◆ Climate change may cause disruption including loss of power supply or rationing of power at peak times.