



The South Westminster BIDs have conducted some research with Portland Communications to find out what London's recovery might look like, so businesses can build an effective plan for moving out of lockdown.

In total, 1,059 members of the general population in the UK (aged 18+) and 1,086 Londoners (18+) were interviewed online with questions relating to travel to places of work and within the UK and London, along with appetite to return to retail, hospitality and leisure businesses.



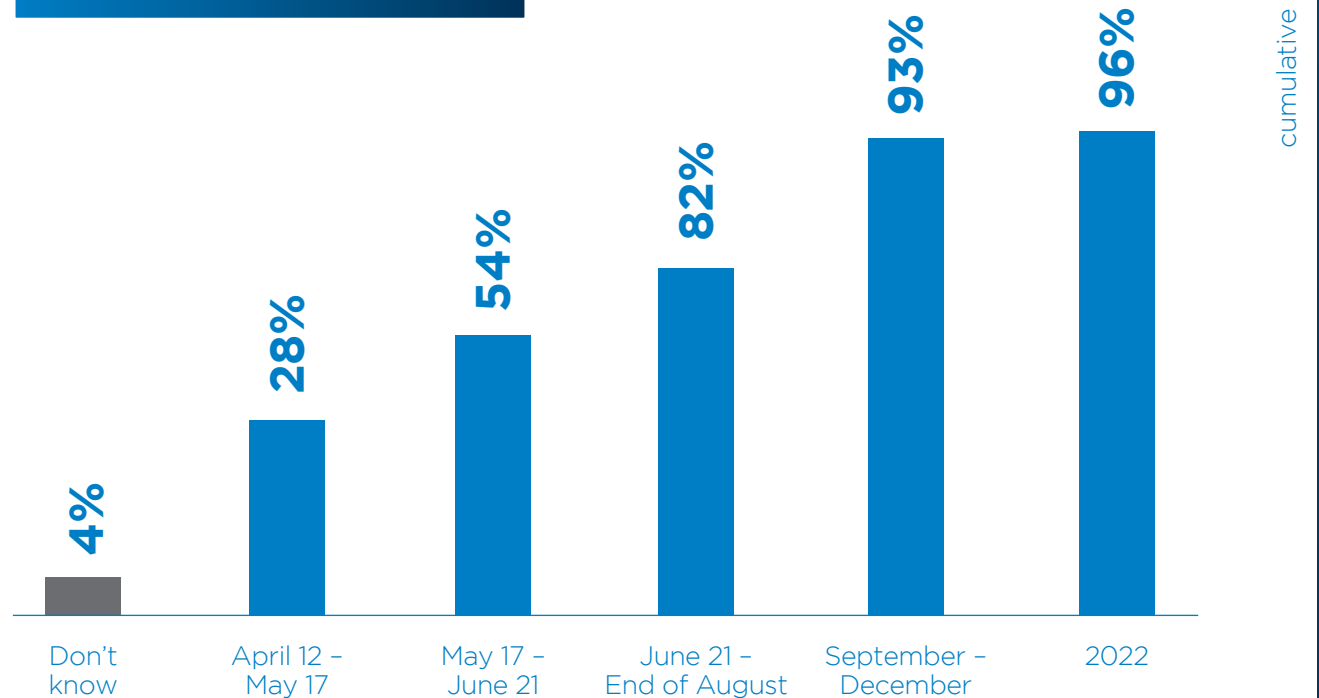
RETURNING TO THE AREA



Return to the office

28% of Londoners expect to go back to the office between April 12 and May 17, this increases to **54%** by June 21, **82%** by the end of August and **93%** by the end of 2021

(414 office workers in London who intend to go back to the office when the stay at home order ends)



THE
NORTHBANK



TRAFALGAR SQ. · STRAND · ALDWYCH

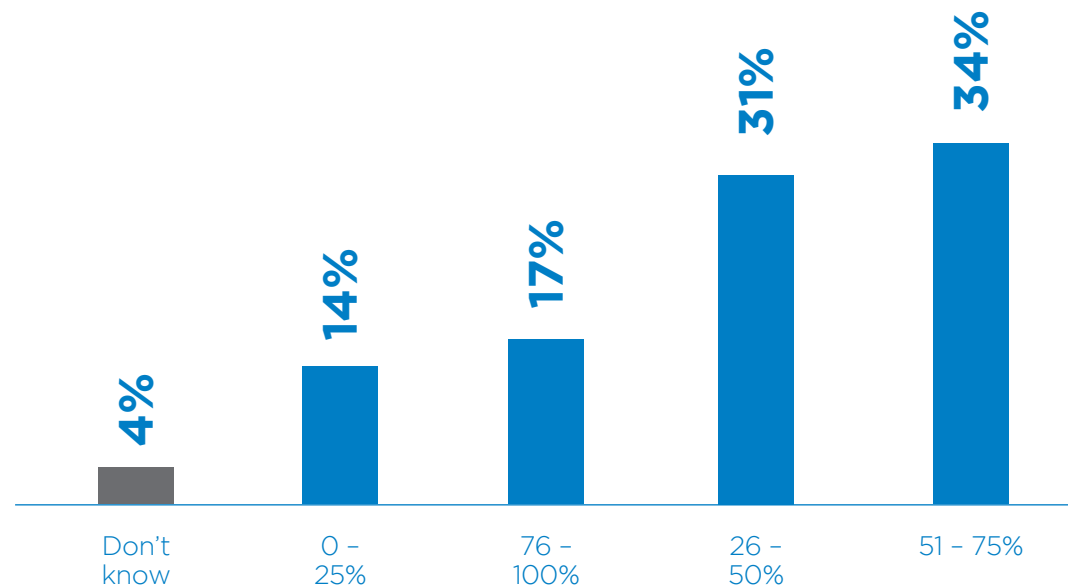


RETURNING TO THE AREA



Return to the office

14% would ideally spend up to a quarter of their working week in the office, **31%** would ideally spend between a quarter and half, **34%** would ideally spend between half and three quarters and **17%** would spend three quarters to their full working week in the office



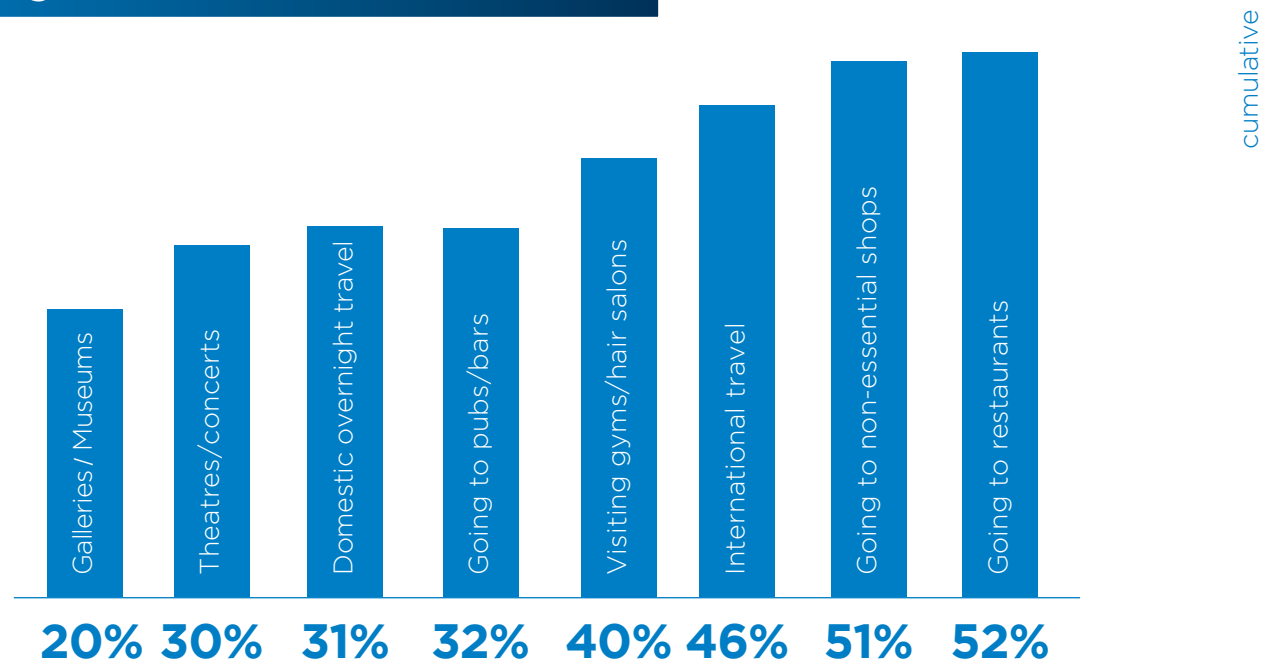


RETURNING TO THE AREA



Travelling into and around **London**

Besides seeing family and friends, **52%** of Londoners were most looking forward to going to restaurants when lockdown is lifted, while **51%** were most looking forward to going to non-essential shops



THE
NORTHBANK



TRAFALGAR SQ. - STRAND - ALDWYCH

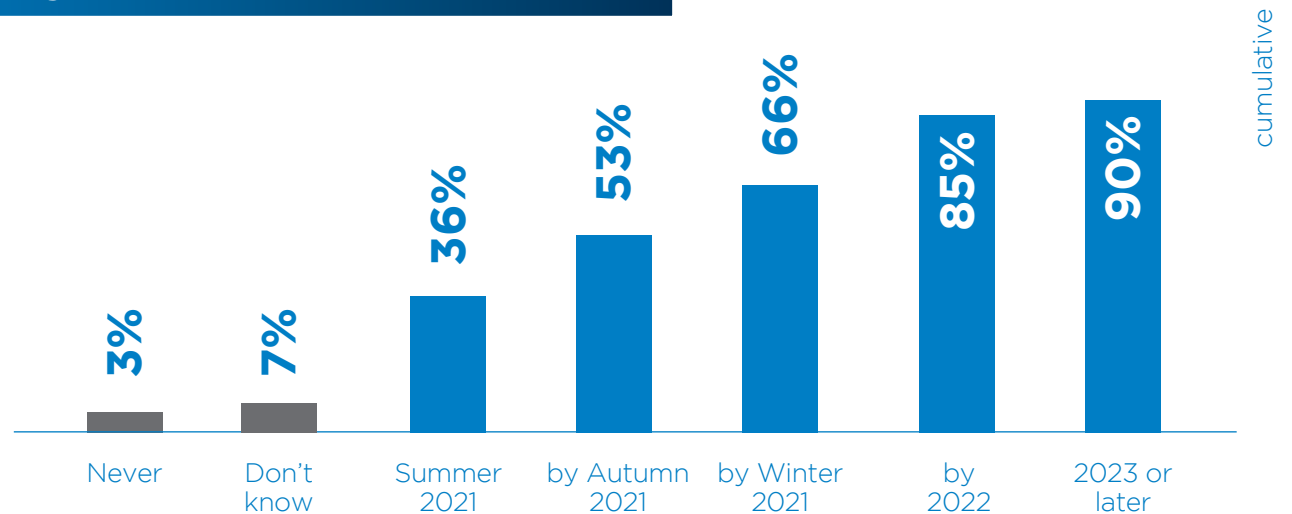


RETURNING TO THE AREA



Travelling into and around **London**

36% of Londoners think they'll return to pre-COVID levels of going to pubs and restaurants by Summer 2021. This increases to **53%** by Autumn 2021, **66%** by Winter 2021 and **85%** by 2022



Between July and September, the likelihood for Londoners going to restaurants and non-essential shops in Central London **increases by almost a fifth if they are vaccinated** by then

THE
NORTHBANK



TRAFALGAR SQ. - STRAND - ALDWYCH

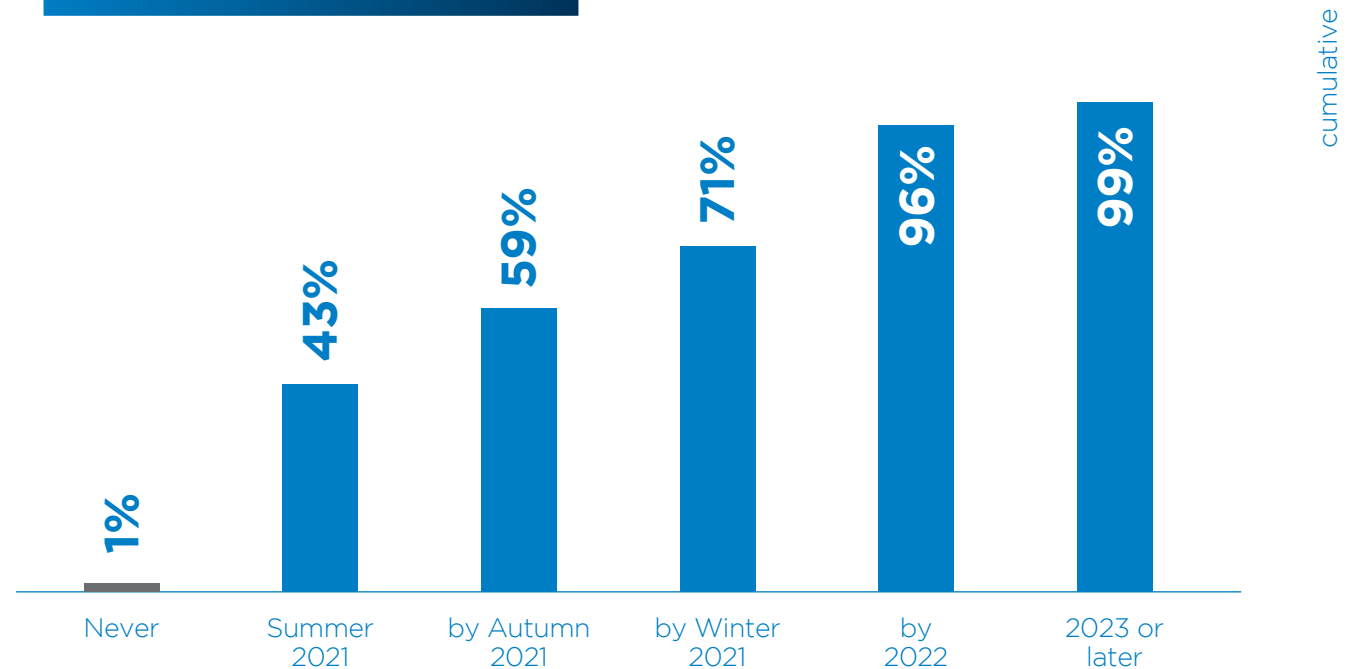


RETURNING TO NORMAL TRAVEL ACTIVITIES



Travel within the UK

43% of the British public think that they will return to normal travel activities within the UK by summer 2021. This increases to **59%** by Autumn 2021, **71%** by Winter 2021, and **96%** by 2022



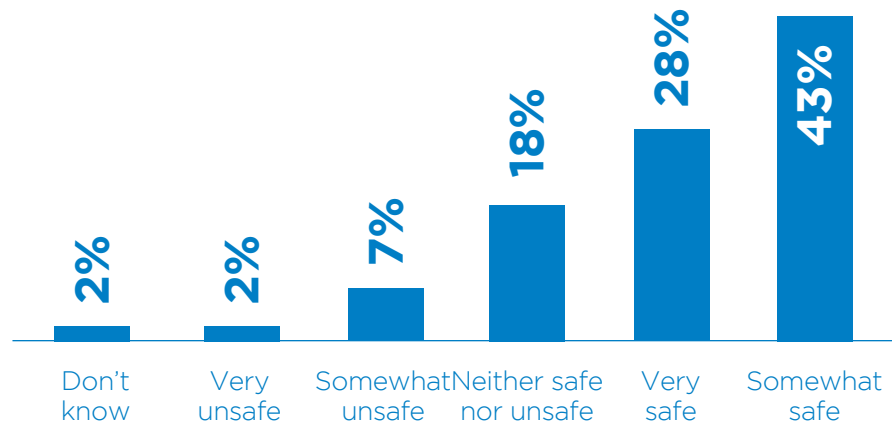


RETURNING TO NORMAL TRAVEL ACTIVITIES

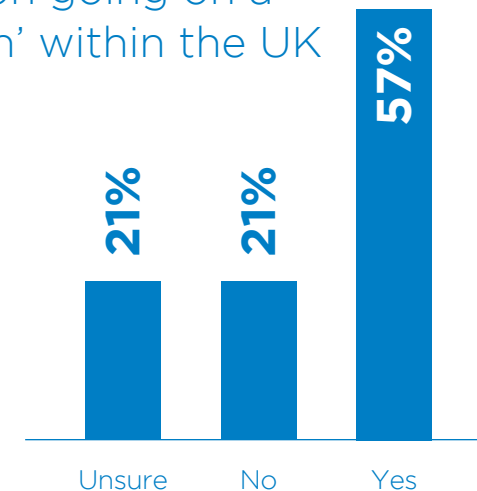


Travel within the UK

In the months after restrictions are lifted on domestic travel, **71%** of the British public feel safe going on a 'staycation' within the UK



57% of the British public intend on going on a 'staycation' within the UK



THE
NORTHBANK



TRAFALGAR SQ. STRAND - ALDWYCH

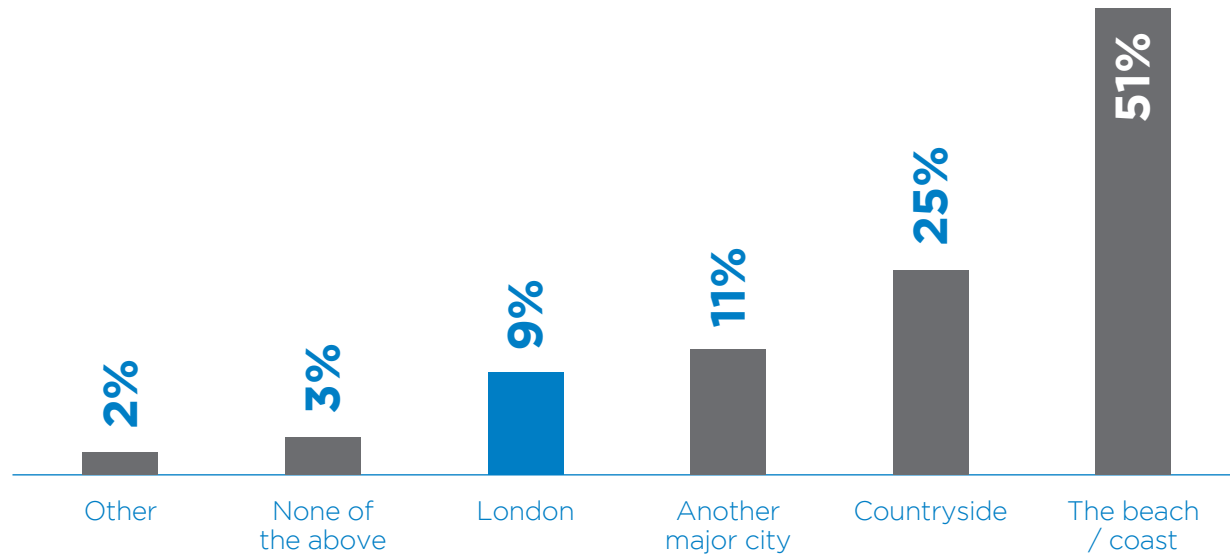


RETURNING TO NORMAL TRAVEL ACTIVITIES



Travel within the UK

9% of the British public who are planning to take a 'staycation' this summer are most likely to go to London



THE
NORTHBANK



TRAFALGAR SQ. - STRAND - ALDWYCH



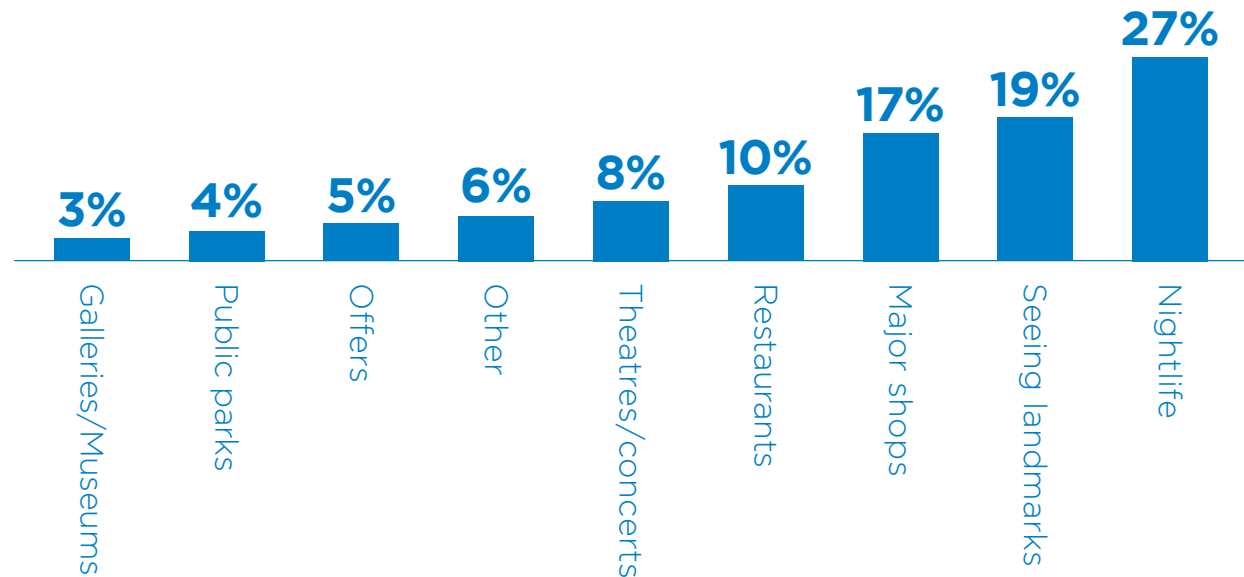
RETURNING TO THE AREA



Travelling into and around **London**

27% of respondents said the biggest thing drawing them to a 'staycation' in London is nightlife, while **19%** said seeing landmarks

(77 respondents who said they are most likely to go on a staycation to London this summer)



THE
NORTHBANK



TRAFALGAR SQ. - STRAND - ALDWYCH

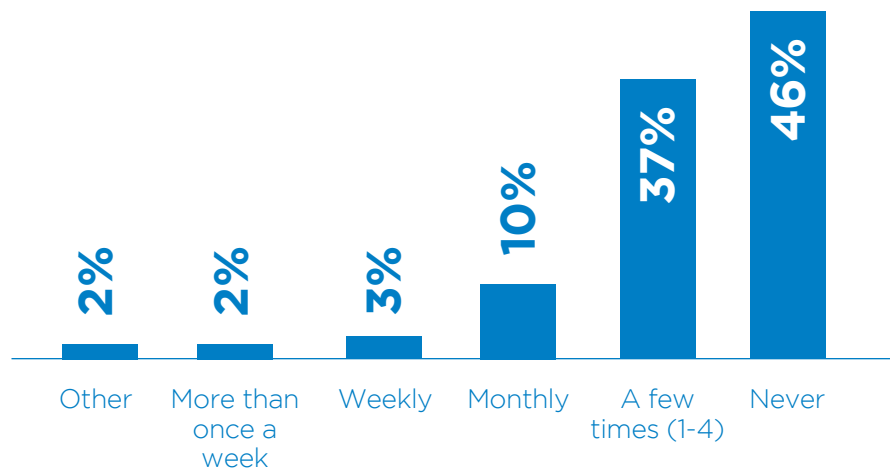


RETURNING TO THE AREA

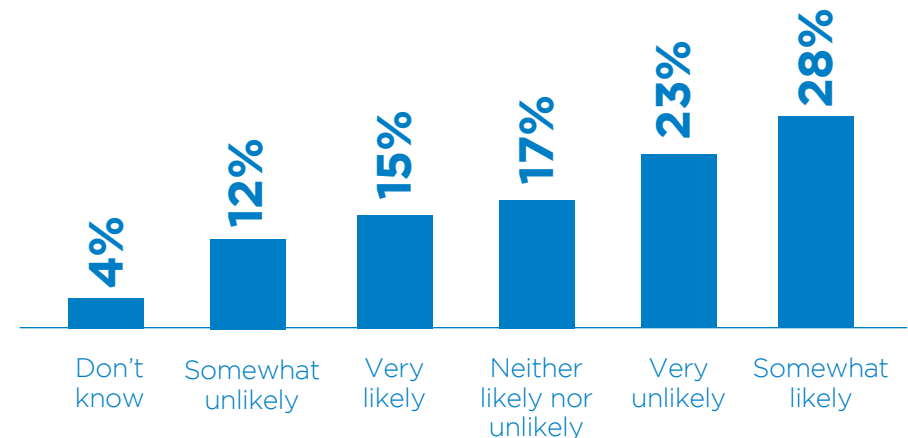


Travelling into and around **London**

In the 6 months before lockdown, **50%** of the British public visited Central London either a few times, monthly or weekly



In the 6 months after restrictions are lifted on domestic travel, **44%** of the British public are likely to go to London specifically



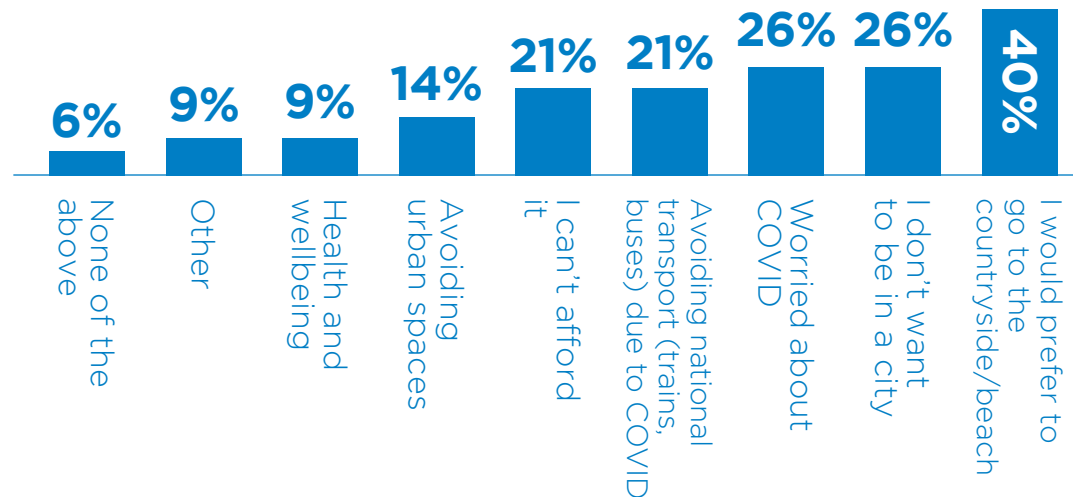


RETURNING TO THE AREA



Travelling into and around **London**

40% of the British public are unlikely to go to London because they would prefer to go the countryside/beach, while **26%** are either worried about COVID or don't want to be in a city (370 respondents who are unlikely to go to London in the 6 months following lockdown)



THE
NORTHBANK



TRAFALGAR SQ. · STRAND · ALDWYCH



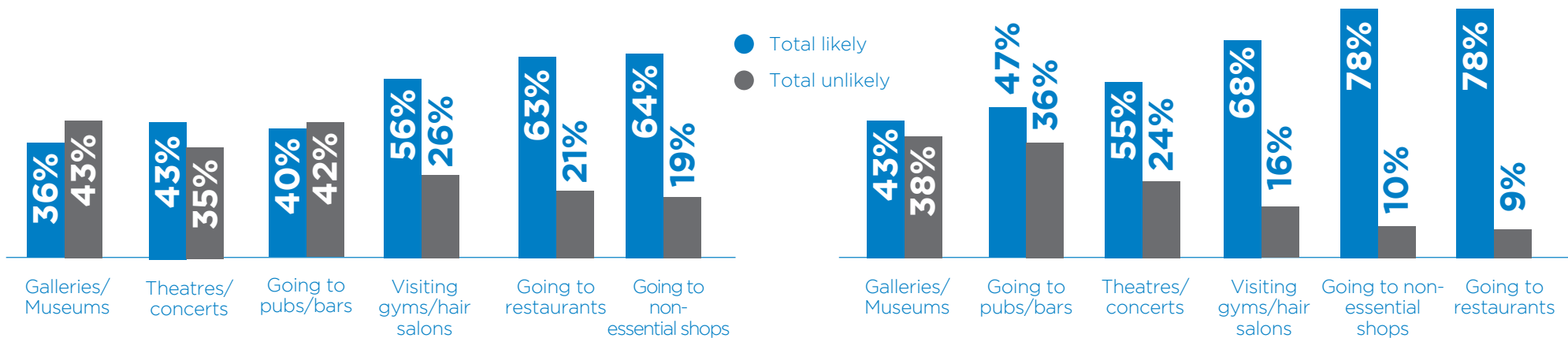
RETURNING TO THE AREA



Travelling into and around **London**

63% of Londoners are likely to go to restaurants if they have not been vaccinated between March and June, while **64%** are likely to go to non-essential shops

How likely Londoners are to go to restaurants rises by 15 percentage points if they have been vaccinated between March and June, while there is an increase of 14 percentage points for going to non-essential shops



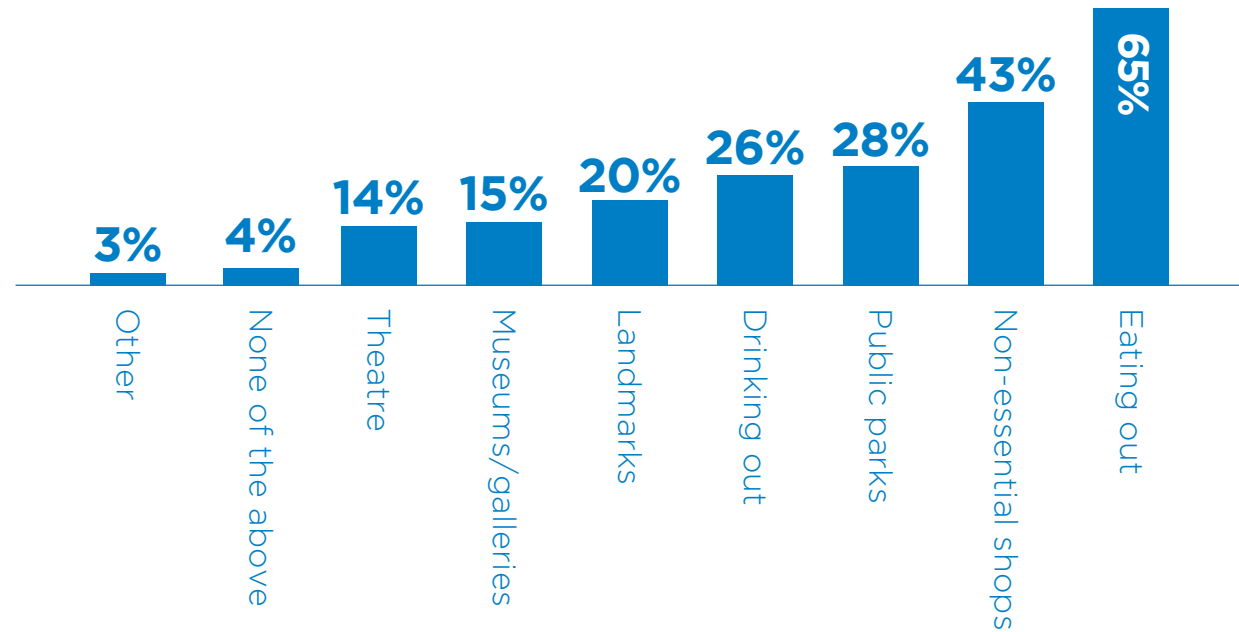


RETURNING TO THE AREA



Travelling into and around **London**

65% of Londoners said the thing they miss most about going into Central London is to eat out, while **43%** miss non-essential shops and **28%** miss going to public parks



THE
NORTHBANK



TRAFALGAR SQ. · STRAND · ALDWYCH

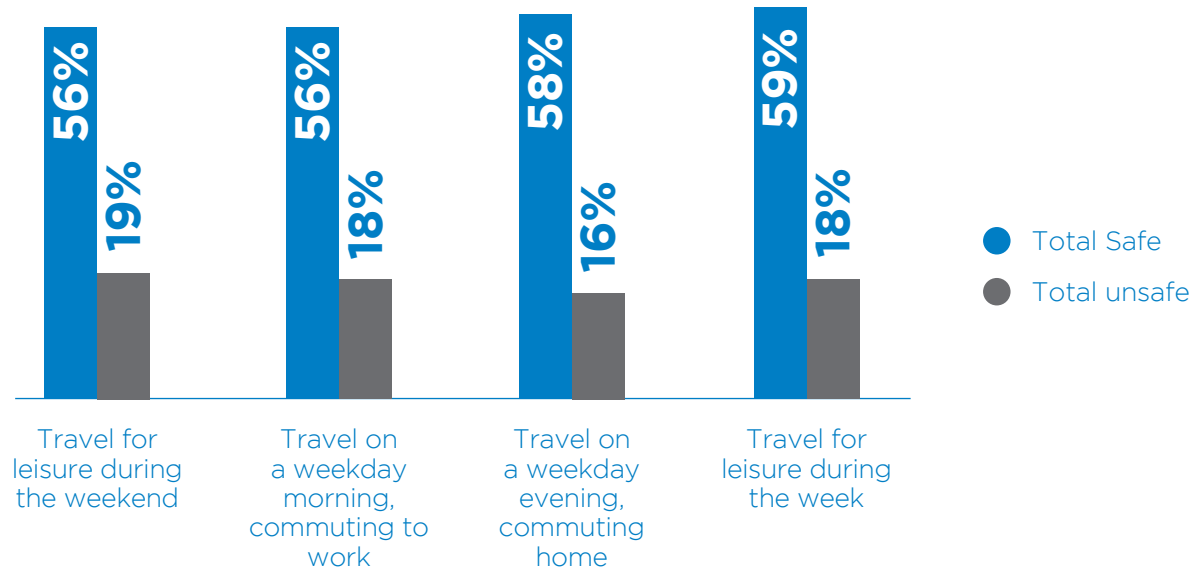


RETURNING TO THE AREA



Travelling into and around **London**

Over **50%** of Londoners feel safe taking public transport in all travel scenarios, whether this is for leisure or commuting during the week and at weekends



THE
NORTHBANK



TRAFALGAR SQ. - STRAND - ALDWYCH

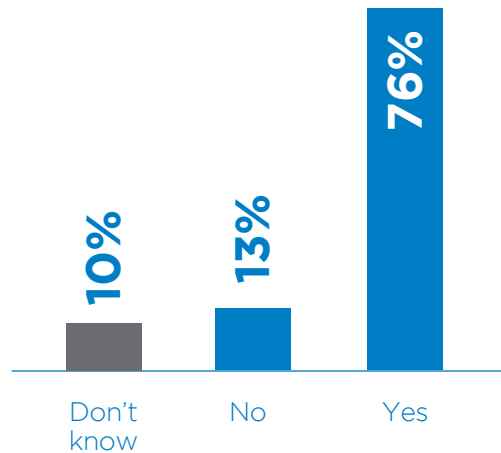


RETURNING TO THE AREA

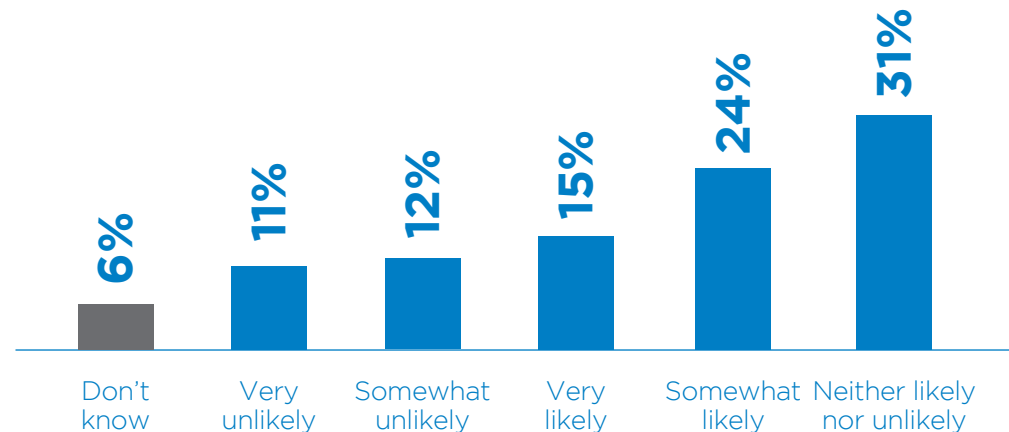


Return to the **office**

When the stay at home order ends, **76%** of Londoners plan to return to their office (545 office workers in London)



39% of Londoners said it is likely the recent drop in COVID infections will encourage them to return to the office (131 office workers who are unlikely or unsure about returning to the office)



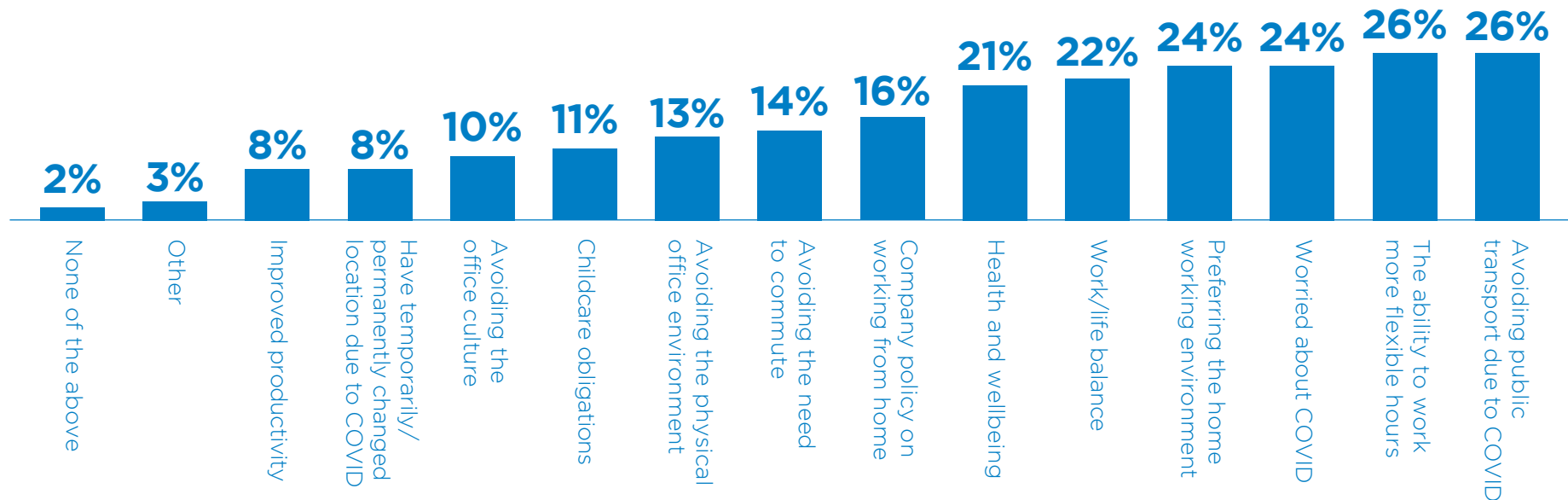


RETURNING TO THE AREA



Return to the office

26% of Londoners who don't want to return to their offices said they want to avoid using public transport and they have the ability to work more flexible hours at home



THE NORTHBANK



TRAFALGAR SQ. - STRAND - ALDWYCH



RETURNING TO THE AREA



Return to the office

65% of Londoners said they intend to get a COVID-19 vaccine, but will return to the office before they've been vaccinated

(414 office workers in London who intend to go back to the office when the stay at home order ends)

I don't intend to get a COVID-19 vaccine

11%

I intend to get a COVID-19 vaccine and I won't return to the office until I've been vaccinated

24%

I intend to get a COVID-19 vaccine, but I will return to the office before I've been vaccinated

65%

THE
NORTHBANK



TRAFALGAR SQ. · STRAND · ALDWYCH



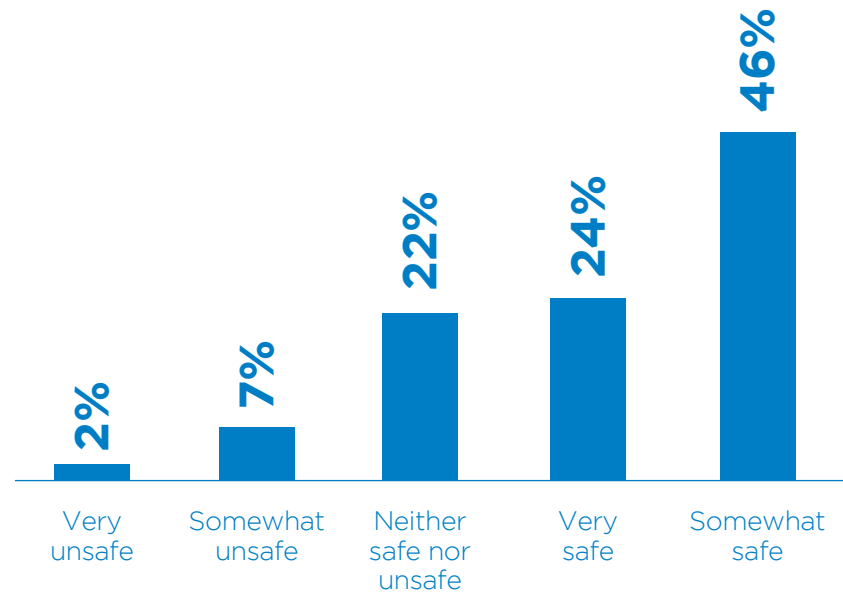
RETURNING TO THE AREA



Return to the office

70% of office workers
said they will feel safe
taking public transport

(414 office workers in London who intend
to go back to the office when the stay at
home order ends)



THE
NORTHBANK



TRAFALGAR SQ. - STRAND - ALDWYCH

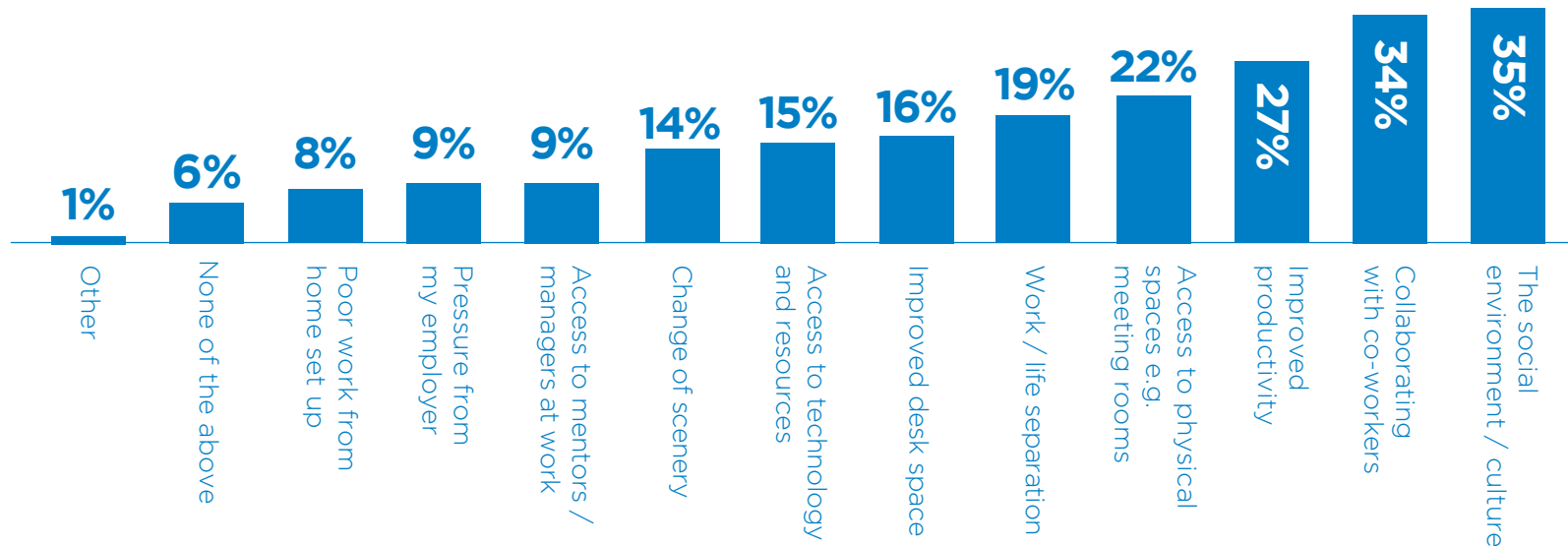


RETURNING TO THE AREA



Return to the office

35% of office workers primary motivations for wanting to return to the office is the social environment/culture, while **34%** want to collaborate with co-workers (414 office workers in London who intend to go back to the office when the stay at home order ends)(131 office workers who are unlikely or unsure about returning to the office)



THE NORTHBANK



TRAFALGAR SQ. - STRAND - ALDWYCH



RETURNING TO THE AREA



Return to the office

72% of Londoners intend to coordinate the days they go into the office with social activities, while **65%** intend to coordinate with opportunities to go shopping and **63%** with opportunities to eat out

(414 office workers in London who intend to go back to the office when the stay at home order ends)

- Yes ●
- No ●
- Not sure ●

