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### **Foreword**

Last year, I spoke of how the pandemic was beginning to impact on our network and our advertising estate. While much uncertainty remains, we now understand more than we did a year ago. The pandemic has had a major impact on our advertising revenues as we worked in line with Government guidelines to ensure that our customers travelled safely and only when necessary. However, as restrictions ease, we are starting to see positive signs for a recovery in the year ahead as London reopens in line with the Government roadmap, and the vaccination programme continues at pace.

At the height of the pandemic, Tube journeys were down by 95 per cent. Although this would have been alarming in normal times, it was the necessary result of us supporting the Government's stay at home message while continuing to run a service for essential workers. Now, we are welcoming more customers back to the network every day, as our large and diverse audience for advertising returns.

As we highlighted in last year's report, until the pandemic struck, we had seen a continued increase in revenue from our commercial media activities and we believe that this trend can resume in the future. It will be underpinned by the investments we have made in our commercial assets and activities. We have nearly completed an £82.9m upgrade and expansion of our digital advertising estate across our rail network, offering exciting creative

opportunities for brands. The Northern Line Extension, with new stations at Battersea and Nine Elms, is set to open this autumn, and the Elizabeth line is on track to open in the first half of 2022. Both will showcase our state-of-the-art advertising infrastructure with new and exciting formats to drive brand creativity, as well as providing new routes and services to attract more customers to our network.

We have also continued working on depersonalised Wi-Fi data, which shows both the volume of people on our network and how they are using it. This helps our agency partners plan and deliver more effective advertising campaigns for brands.

I was proud to see us adapt to the market conditions and still deliver our best year yet for high impact brand partnerships. The PlayStation 5 launch with Sony attracted a huge level of media attention in both press and social media. Another was our important tie-up with Dettol to sponsor our hand sanitiser programme. Our hard work in this area was rewarded with the European Sponsorship Rights Holder of the Year award, alongside Paris Saint-Germain football club. High praise indeed.

Many challenges still lie ahead, but with one of the largest out-of-home advertising estates in the world serving a large and important audience, coupled with cutting edge advertising infrastructure and an innovative approach to commercial partnerships, I am confident that we

are ready to take advantage of all the opportunities that come our way.

I would like to thank our advertising partners, particularly Global and JCDecaux, for their hard work during this challenging year. We welcome their expertise and look forward to working closely with them to support London's economic recovery.

I am also grateful for the support of the Advertising Steering Group, ably chaired by Dr Mee Ling Ng. Despite everything, I think we have maintained the openness and attractiveness of the network during this period and we will continue to ensure that our advertising reflects the diversity of the city we serve.

In the meantime, if you have any views on our Advertising Policy, or even just on an advertisement you may have seen on our estate, please do get in touch. Take care.



Chris Macleod
Director, Customer and Revenue



### Message from the Chair

TfL's Advertising Steering Group oversees the implementation of the Advertising Policy and provides an external and independent point of view on advertising policy issues. Over the last year, this has included hearing about the impacts of the pandemic on the TfL advertising estate.

The Advertising Steering Group started with a focus on improving the representation of body image on TfL's estate, but our work now encompasses so much more. The fact that we have been able to broaden our approach demonstrates the fantastic work that the group and TfL have done in boosting body image diversity on the network. I hope that as you travel around London you find the advertisements are increasingly representative and diverse.

I was pleased to see the Diversity in Advertising competition run again this year. Now in its third year, the competition challenges stereotypes and aims to make advertising in London more representative of the city in which we live. It was encouraging to see advertisers get involved again, especially against the backdrop of the pandemic.

The advertising restrictions for products high in fat, sugar or salt had its two-year anniversary in February 202I. Advertisers and TfL are now being proactive in altering advertisements to make sure they comply

with the policy. TfL has been helping other authorities to implement similar policies for themselves.

I would like to thank the members of the Advertising Steering Group, as well as the advisers from TfL and its partners, for their input and support over the last few years. Their insight and knowledge remain, as ever, invaluable. A special thank you goes to Tom Knox, Chairman of MullenLowe, Dr Phillippa Diedrichs, Professor of Psychology at the University of the West of England and Jeff Ingold, Head of Media at Stonewall for all their work.

I would also like to thank Chris Macleod who will be retiring from his position as Customer and Revenue Director at TfL after I5 years. His support for the group has been vital, and he has worked tirelessly to grow TfL's Commercial Media division. I wish him the very best in his retirement.



**Dr Mee Ling Ng OBE**Chair of the Advertising Steering Group





### A year like no other

#### The industry

Advertising, like many industries, has been dramatically affected by the pandemic. The out-of-home sector has been one of the worst impacted, with a 46 per cent drop in revenues year on year, from £I.3Ibn in 2019 to £699m in 2020.\* Our advertising estate is part of the out-of-home sector, and with Government restrictions requiring people to stay at home, brands could no longer reach customers travelling on the network.

Declining revenues didn't stop with out-of-home. The whole advertising landscape suffered as the uncertain future caused brands to pause and re-evaluate. The knock-on impact was that initially even media such as television and radio encountered advertising revenue declines, despite audiences increasing.

Airports and shopping malls were also severely impacted due to an almost total reduction in footfall as travel was suspended and all non-essential retail ordered to close. As a result, train networks saw a significant decline in customers, with arguably the worst hit being London Underground, due to most people working from home. During March and April 2020, when the strictest lockdown restrictions were in place, we saw a 95 per cent drop in Tube journeys.

'As we look forward to the coming year, there are promising signs of a recovery'

Our bus shelters and roadside assets proved to be slightly more resilient, as road traffic began to increase at a greater rate and a more localised approach to London living was adopted.

#### Our partners

In our last Advertising Report, we said we were entering uncertain times as the pandemic took hold. It has been hard to plan as lockdown measures were eased and then reinstated as the virus levels fluctuated. While there was some optimism for a recovery in summer 2020 as the first lockdown eased and our passenger numbers started to increase, this stalled with new restrictions in September and then effectively halted again in December when further restrictions were announced.

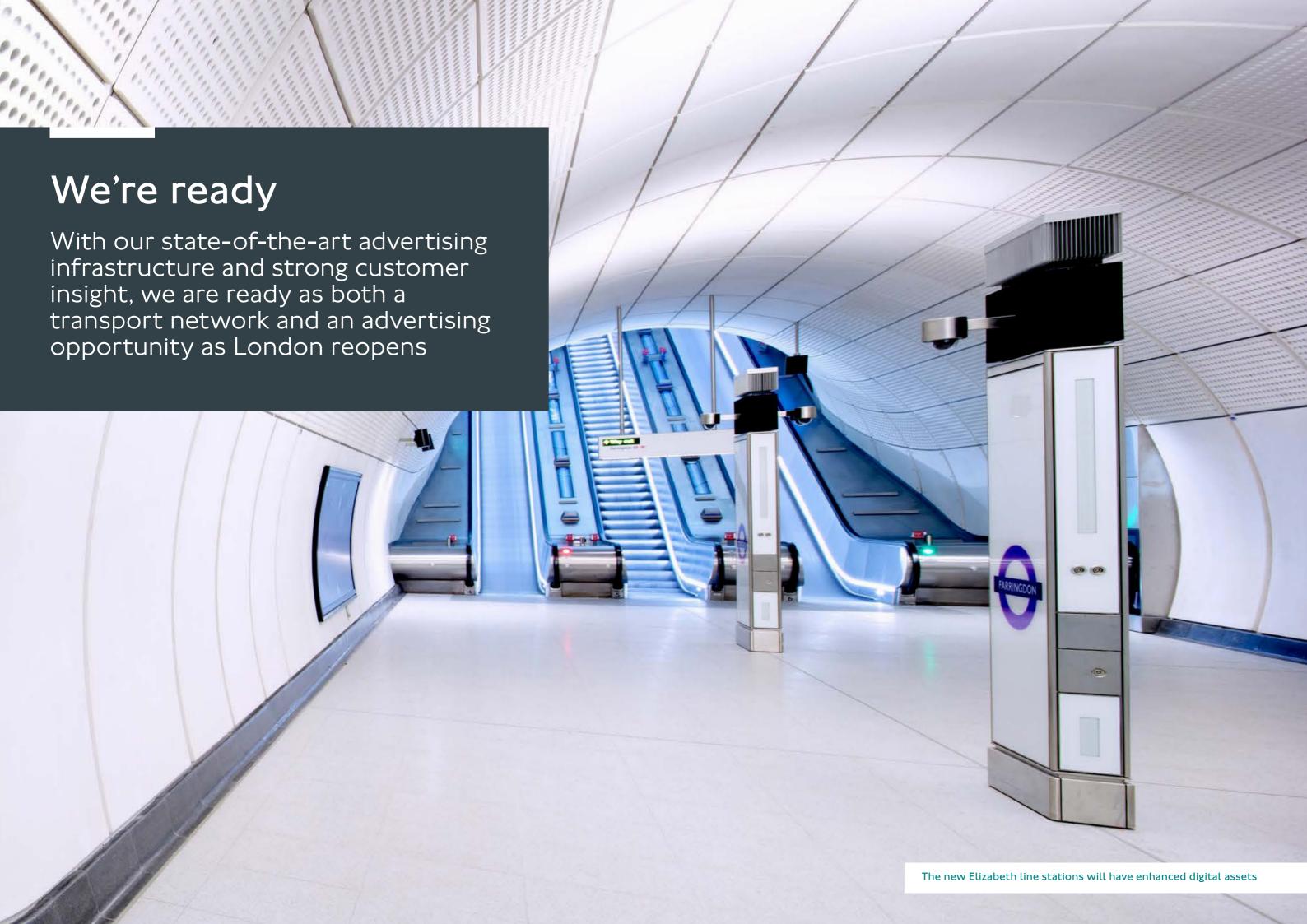
The subsequent drop in revenue meant that we have had to work closely with our media partners to understand the impacts of the pandemic on advertising, and work on rebuilding the estate and revenue streams as people return to the network.

#### Financial overview

The first quarter of the financial year was the hardest hit, with revenues falling by more than 90 per cent when the first lockdown took place. Based on an advertising industry downturn of 14.6 per cent across the 2020 calendar year and an out-of-home industry downturn of 46 per cent, this illustrates our exposure to drops in advertising revenue as passenger numbers significantly reduced. As a result, our total commercial media income was reduced by around 68 per cent to £50m for our 2020/2I financial year.

As we look forward to the coming year, there are promising signs of a recovery, as the Government's roadmap to easing restrictions is implemented and the vaccination programme continues across the country. Our central scenario for ridership recovery suggests that 2021/22 levels will average around two-thirds of 2018/19 demand. This accounts for a gradual return of demand from people travelling for office work and leisure, following Step 4 of the roadmap.

<sup>\*</sup> Source: Outsmart/PWC



There is uncertainty over how the industry and our advertising estate will rebound in 2021. However, we know there is reason for cautious optimism as the vaccine programme continues and we move out of lockdown restrictions. Our heritage, our advertising estate and our investment in estate expansion means that we will have a unique opportunity to entice advertisers back to the Underground. Expansions to our network will also offer advertisers new and exciting spaces and formats, all utilising the latest in digital technology.

#### **Network expansions**

The Northern Line Extension will see new stations open at Nine Elms and Battersea in the autumn of 2021. These will be the first new Underground stations in London since 2008.

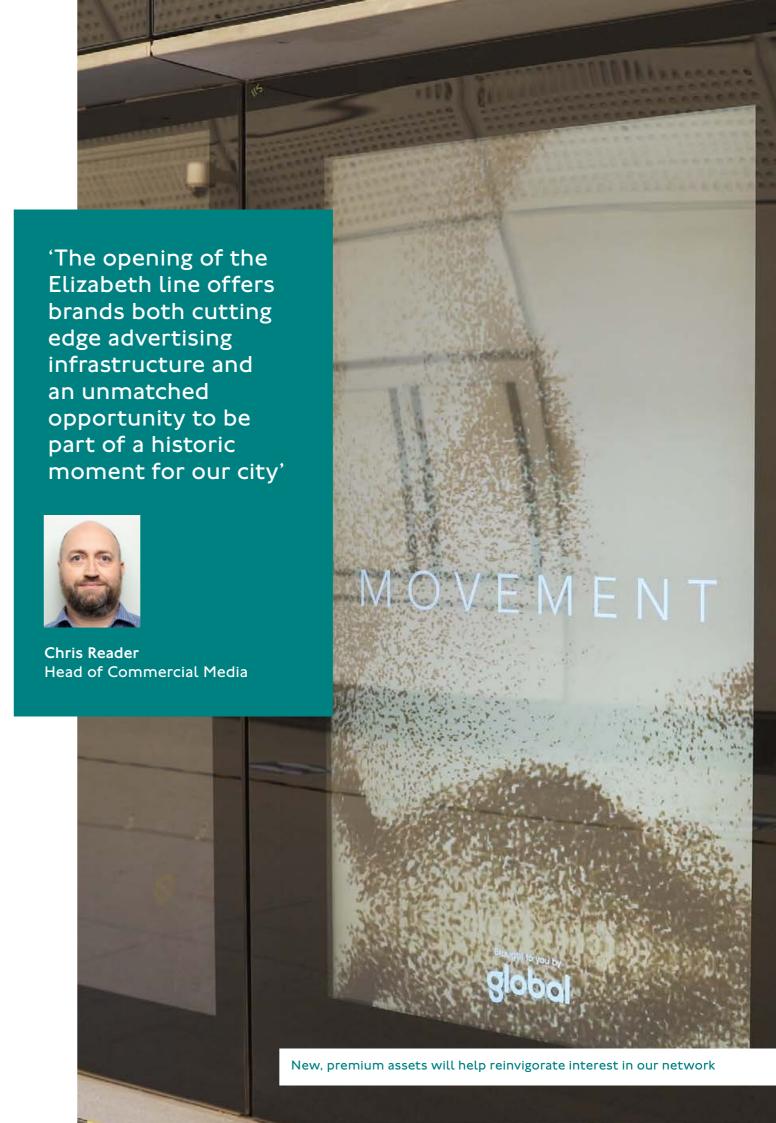
Andy Byford, London's Transport Commissioner, has made opening the Elizabeth line as soon as possible a priority. The railway is on track to open in the first half of 2022, and we have already seen the first two central London station in Farringdon and Tottenham Court Road formally transferred to us. The new Elizabeth line central stations will feature a wide range of digital assets, as well as enhanced versions of the more traditional formats. Our award-winning digital escalator 'ribbons', made up of ultra-HD LCD screens, will run along the length of the escalators. There will also be large, premium assets, as well as 75-inch and 86inch digital screens, all with full-motion capability. For the first time, the 75-inch screens will be integrated into the platform edge doors to create a digital gallery along the platform.

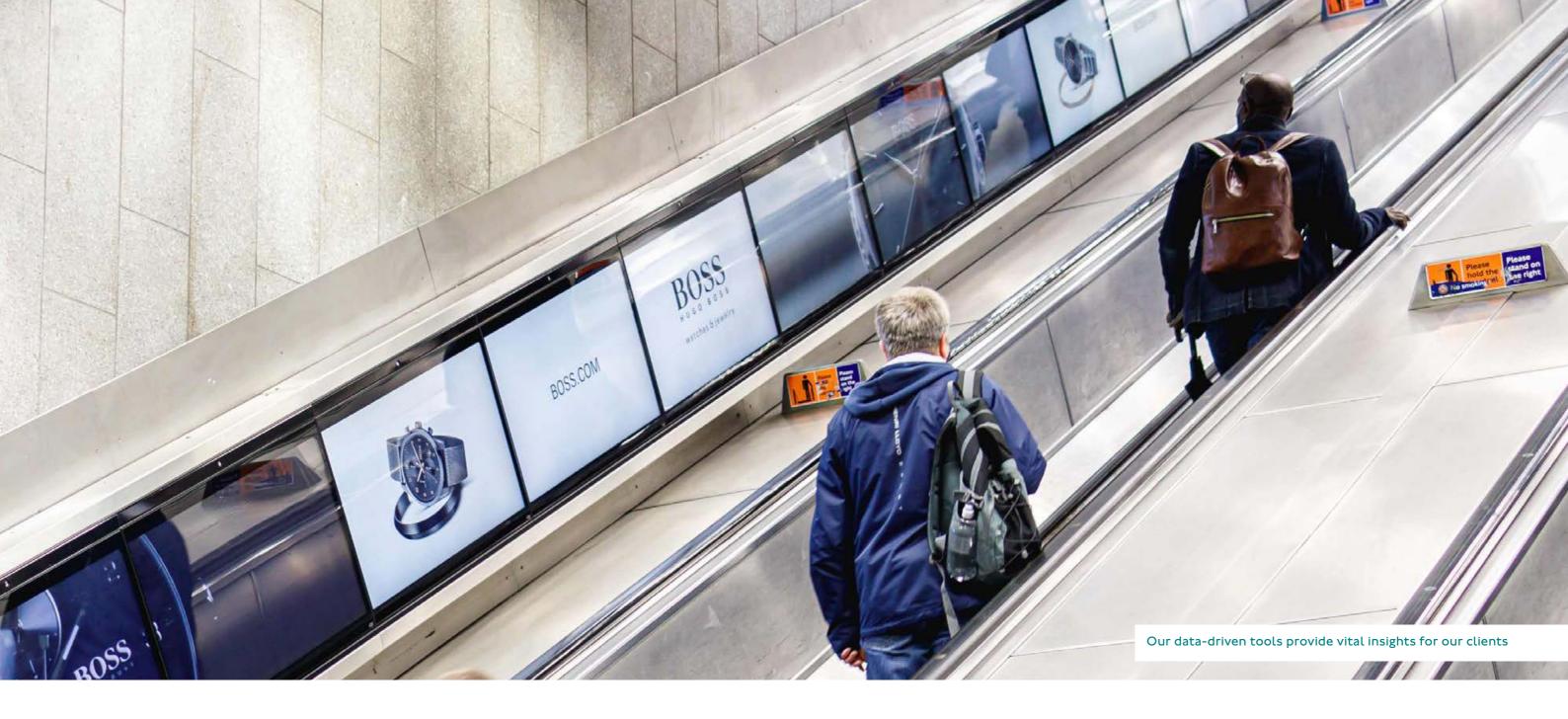
The new assets deployed across our estate over the last couple of years, together with these network expansions, will help to reinvigorate interest in our network and showcase our state-of-theart advertising infrastructure.

#### Staying proactive

Over the last year we have continued to be proactive, and during the summer and autumn of 2020 we studied how our customers use the network under different situations. We are now ready to empower brands to reach target audiences as travel returns to pre-pandemic levels.

As our economy reopens, we believe the pent-up demand for the entertainment, retail and hospitality sectors that London uniquely delivers at scale will fuel an economic rebound, which advertisers will want to take advantage of. With our cutting edge advertising infrastructure and strong customer insight, we will be ready as both a transport network and an advertising opportunity as London re-opens. We will also continue our drive to evolve and futureproof our business, especially through our use of data.





### Using our data

We provide our partners and clients with the best information available about our advertising estate. This year has seen the benefits of this more than ever. With active road traffic counts and our new Wi-Fi data insight products, we can give our partners and prospective clients an idea of how many people are seeing their advertisements, as well as how often, where and when.

All the customer information we produce is depersonalised and grouped by zone within stations. Trends and data are only shared with advertisers on an aggregated basis meaning that no individual customer can be identified.

Through our data-driven tools we can provide additional benefits to customers and our advertisers. Depersonalised Wi-Fi data enables us to measure and understand demand on the Tube network in greater detail and has given us greater

insight into movements and dwell times across the stations themselves. The data helps us to determine which stations are busiest and when; and the time it takes to travel through stations and make interchanges where many route options exist. We use this insight to advise customers, helping them make informed decisions to avoid overcrowding. We also continue to use 'tap' data to better understand the passenger volumes and estimated consumer demographic profiles at each station.

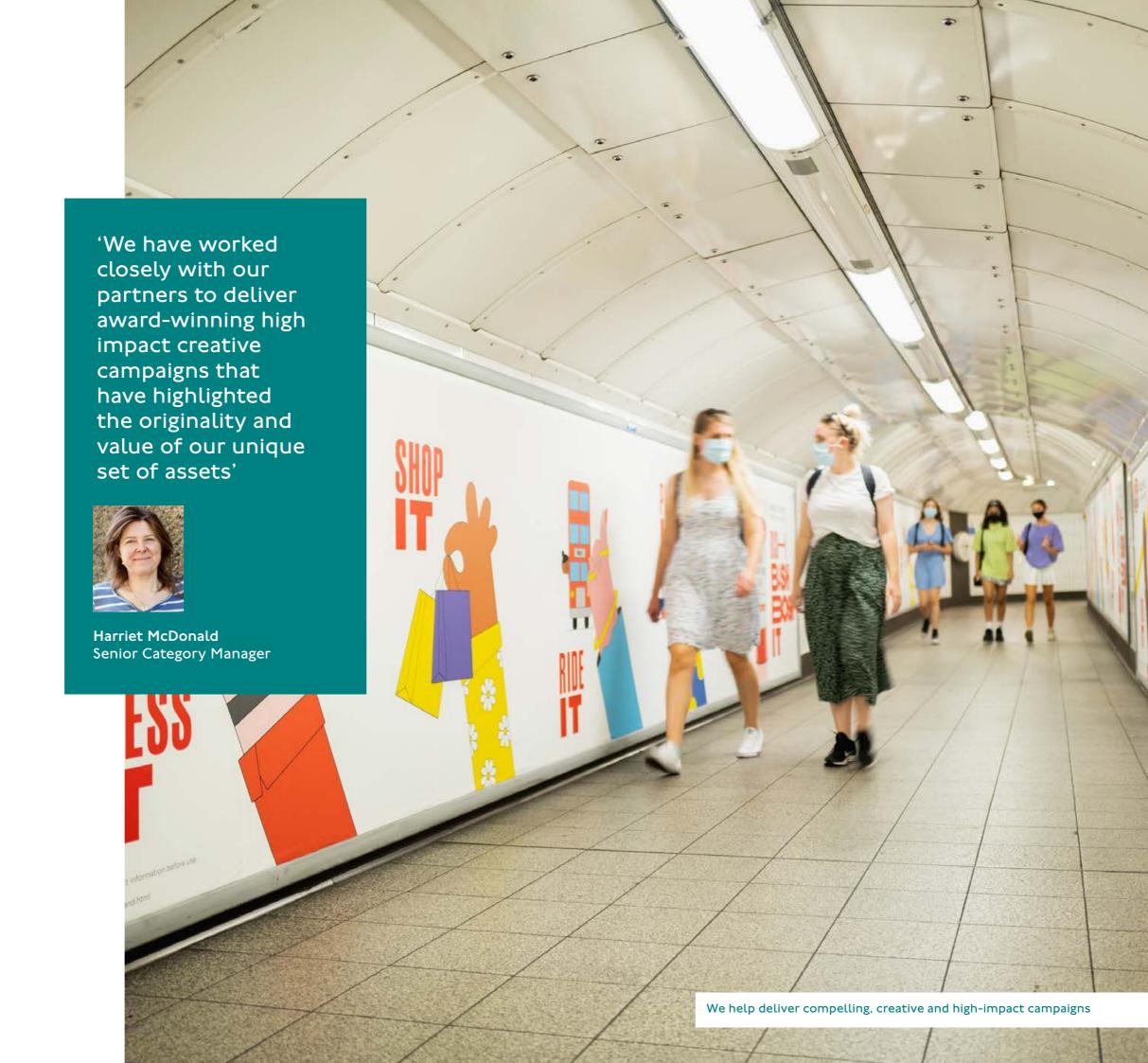
Thanks to the new surface transport data hub, we have been able to provide easy access to current and historical traffic flow data at key roadside advertising sites. This has enabled us to monitor their value throughout the year now that travel patterns have changed. It puts us in a better position to take advantage of the return to 'normal' trading as the economy opens again.



We have a growing reputation for working with advertisers and brands to deliver high impact, creative campaigns across our network. We are extremely proud that 2020, with all the challenges faced, was our most successful year yet in this area.

With reduced audiences, creating campaigns that would attract media coverage via PR and social media channels was the key to securing income. This presented an opportunity for us to highlight our creativity.

We developed timely propositions and used our full portfolio of assets, including our globally recognised brand, intellectual property, significant digital audience and trusted station environments, all of which would prove to resonate with the marketplace. Some of our highlights are detailed over the next few pages.





Oxford Circus roundels above and below ground were reimagined for a 48-hour period. This partnership created instantly recognisable imagery to gamers and non-gamers alike, with a beloved icon that had never been so radically changed before, generating 84 pieces of press coverage and more than 300 million social media impressions in 24 hours.

successful that Dettol have extended it to run for a further year across all transport modes.





In September 2020, we ran a campaign with Netflix to promote their new release, Enola Holmes.

The promotion featured five statues of historic female characters who had been overshadowed by their brothers. A specially commissioned statue of Enola, with her hands on her hips staring stubbornly at the statue of Sherlock Holmes, was installed at the entrance to Baker Street station. Silhouettes of Enola also replaced those of Sherlock on the northbound Bakerloo line platform.

### Jack Daniels

Many advertisers and brands continued to advertise with us throughout the pandemic. These ranged from local businesses to large multinationals. For example, we continued our long-standing partnership with Jack Daniels as they ran another campaign in November 2020.





# NOW MORE

### Promoting diversity

We encourage advertisers to reflect London's incredible diversity by being highly proactive and challenging stereotypes

# NOONE

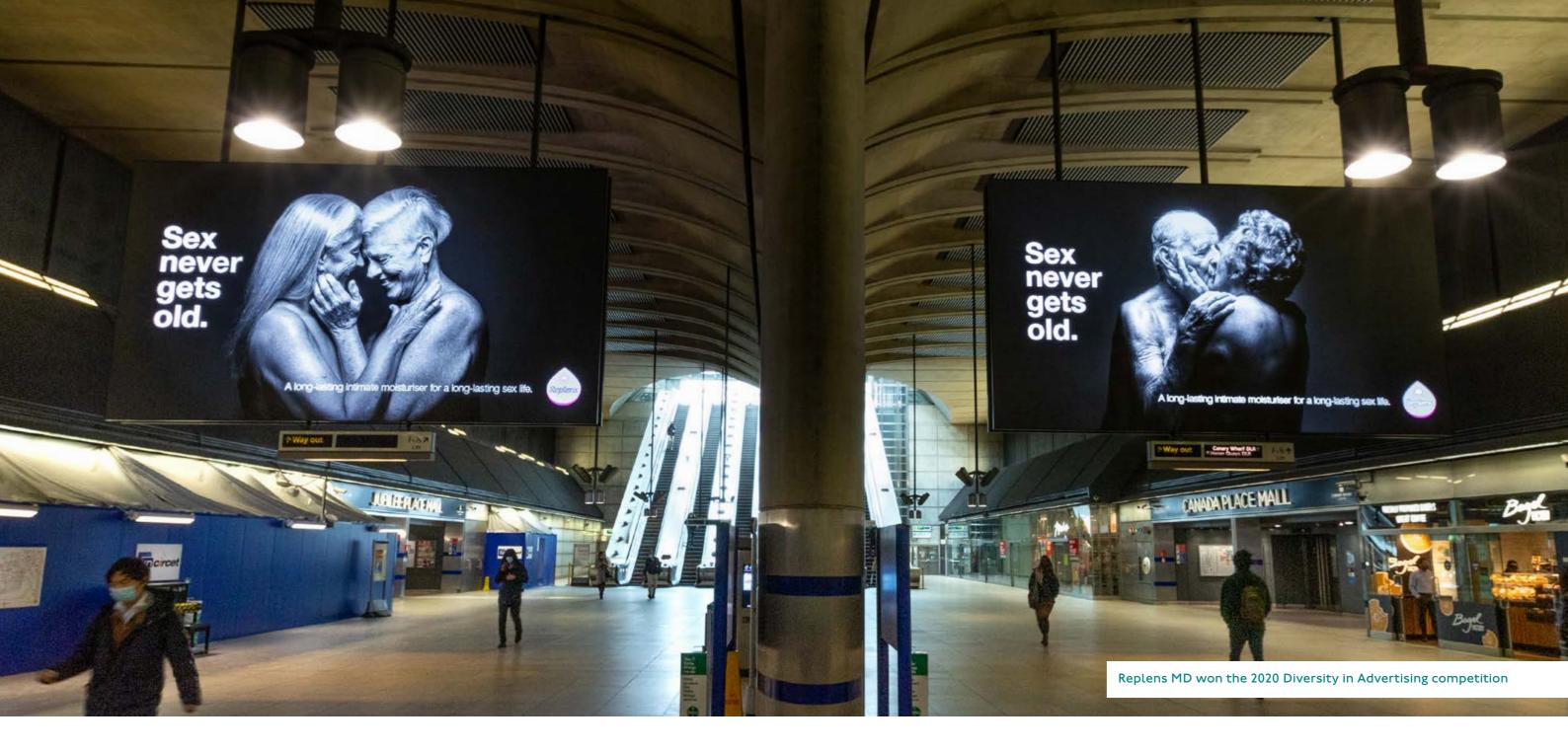




www.ageuk.org.uk

Age UK is a registered charity, registered charity number 1128267.





Working with City Hall, we ran the Diversity in Advertising competition for the third year. This year's competition aimed to tackle inauthentic and one-dimensional portrayals of people aged 55 and over within advertising. Research by Lloyds Bank in 2016 found that, while those aged over 65 made up 17.7 per cent of the UK population, this group only featured in 6.17 per cent of advertising.

#### Winner: Replens MD

This year's winner was Replens MD, which produces a vaginal moisturiser. They received advertising space across our network that is worth the equivalent of around £500,000.

As with previous years, the advertising space for both the winner and the runner up was provided by our main media partners, JCDecaux and Global.

Replens MD's campaign was chosen because of its bold creative, which challenges the assumptions around older people and intimacy by celebrating these relationships. The brand was also commended for reducing the stigma around a product that women may feel shy discussing or embarrassed to say they need.

The campaign was well received, with Campaign magazine describing it as 'beautiful and emotionally powerful', and that they hoped other brands would 'take note'. There was also coverage beyond the UK, highlighting the global reach of these campaigns.

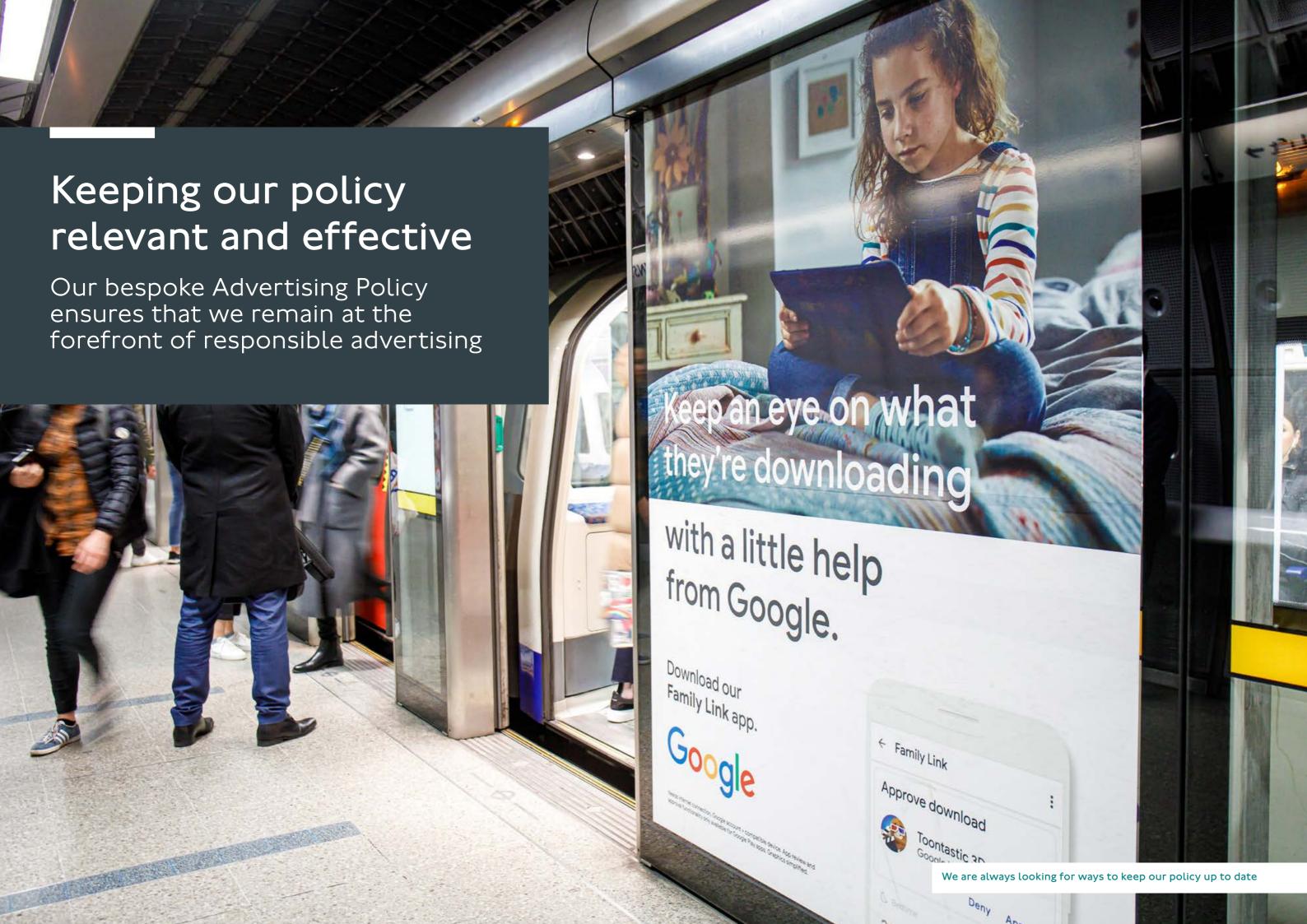
### Runner-up: Brompton

This year's runner-up prize went to London-based Brompton, which is the UK's largest bike manufacturer.

Brompton's campaign stood out by turning the term 'getting on' on its head. It cleverly shows a range of older people emanating confidence and literally about to 'get on' a bike, which in turn is opening them up to a world of possibility.

The advertisements were well received by the press, being described as 'empowering'.





Advertising on our network is governed not only by the Codes of Practice which apply to all advertising, but also by our own unique Advertising Policy. We are always looking at how our policy might be updated to ensure it remains socially and ethically responsible.

For example, we continue to require our advertising partners to refer to us for review all advertisements from, or relating to, countries on the list produced by The International Lesbian, Gay, Bisexual, Trans and Intersex Association, for countries with the death penalty for same-sex sexual acts. We ensure our partners have the current list as this is updated yearly. We also have guidance for responsible advertising on short-term lets.



# Restricting products that are high in fat, sugar or salt on our advertising estate

In February 2019, we amended our Advertising Policy to reflect the requirements of the Mayor's London Food Strategy, by introducing guidelines to restrict the advertising of foods and non-alcoholic drinks that are high in fat, sugar or salt across our advertising estate.

The basis of the restrictions were assessments using the Public Health England nutrient profiling model. The restrictions themselves do not 'ban' any specific brands or products from advertising on our network. However, the restrictions apply to both the direct promotion of food and non-alcoholic drinks, as well as the indirect

promotion or incidental use of food and non-alcoholic drinks in an advertisement.

In 2020/2I, we rejected 38 advertisements for foods and non-alcoholic drinks that were high in fat, sugar or salt. However, even though we declined a number of advertisements, many of the advertisers submitted alternative copy or worked with us to amend their campaigns so that they could run across our network.

This policy reached its two-year anniversary in February 2021, offering a chance for reflection on its success so far. We continue to work with brands, allowing them to alter their

advertisements to meet the restrictions. This has enabled us to keep the revenue from these campaigns while still ensuring that our advertising estate continues to reduce children's exposure to advertisements for food and drink that contribute to child obesity in London.

We have also been assisting other authorities, both domestically and abroad, in implementing similar policies for their own advertising estates. This is a welcome development that speaks of the continued success and support for the policy.



### Recognising our success

Our creativity and innovation are increasingly recognised by the industry. In the past year we were proud to win a number of awards.

A highlight was being named the European Sponsorship Rights Holder of the Year alongside the footballing giant, Paris Saint-Germain. It marks how much we have evolved commercially in recent years, as well as signalling our continued attractiveness to advertisers.

We have gone from not having a partnerships programme at all, to

generating significant income and being recognised as a leader across the commercial industry. The judging panel said, 'TfL has come on leaps and bounds in imaginatively delivering brand fame for partners. This impressive success story, built on innovation and redefining commercial strategy, is an incredibly worthwhile winner.'

We want to thank everyone from the operations, press, social media, customer experience and cycle hire teams whose collaboration makes these partnerships such a success.

### Winners: The Drum Out of Home Awards:

- Dettol keeps London moving safely Best creativity and innovation during COVID-I9
- Amazon Prime rename of PICARDilly Circus – Spectacular of the year

#### Shortlisted: The Campaign Media Awards:

We were proud to win the 'Best use of experiential' award for the Sony PS5 Launch. As part of these awards we were also nominated in the following categories:

 Amazon Prime rename of PICARDilly Circus – Media Partnerships: budget over £250,000

- Sony PS5 Launch Best use of experiential
- Sony PS5 Launch Creative idea: budget over £250,000
- Dettol keeps London moving safely Best use of experiential
- Dettol keeps London moving safely – Media Partnerships: budget over £250,000



### Our advertising in 2020/21

















7,818 advertising campaigns on the network

1,448

Government, political and social campaigns delivered (top three category)





retail campaigns delivered (top three category)

1,029

entertainment and leisure campaigns delivered (top three category)





### One

advertisement was subject to ASA complaints (no complaints were upheld)

55

advertisements declined



£50m

commercial income for the year



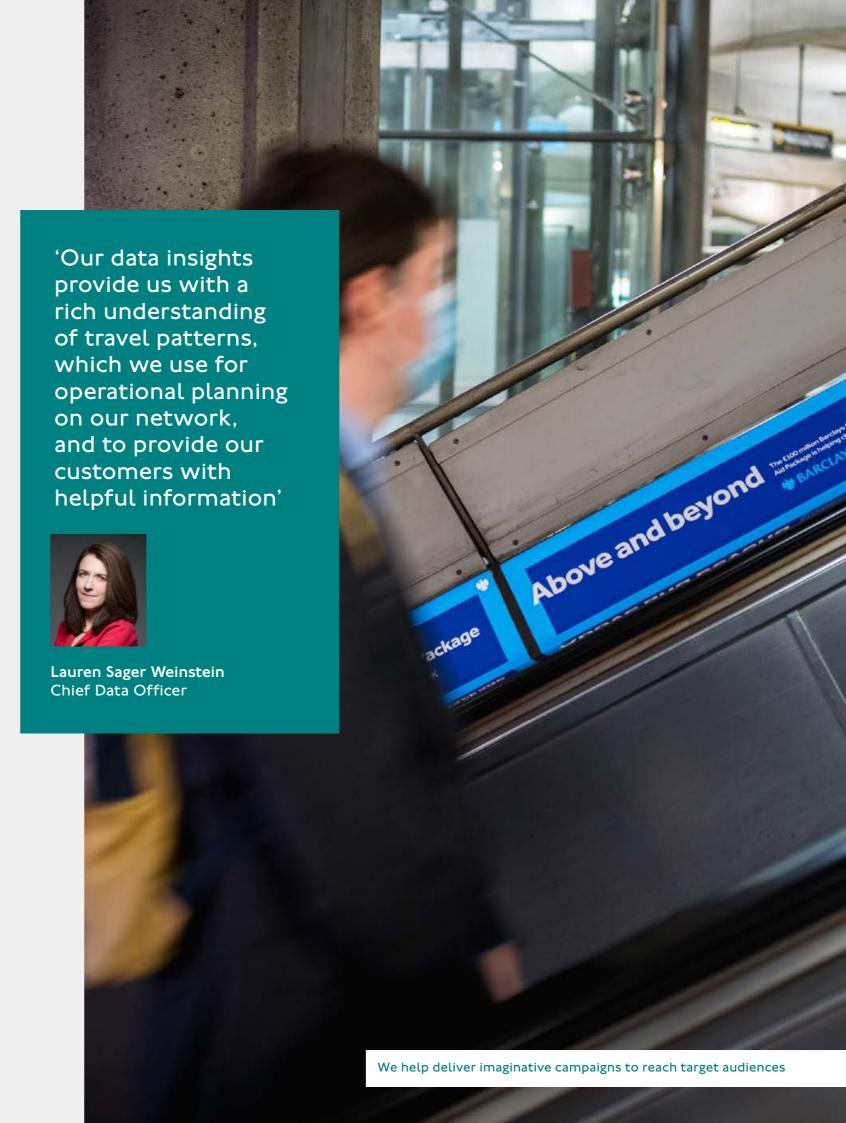


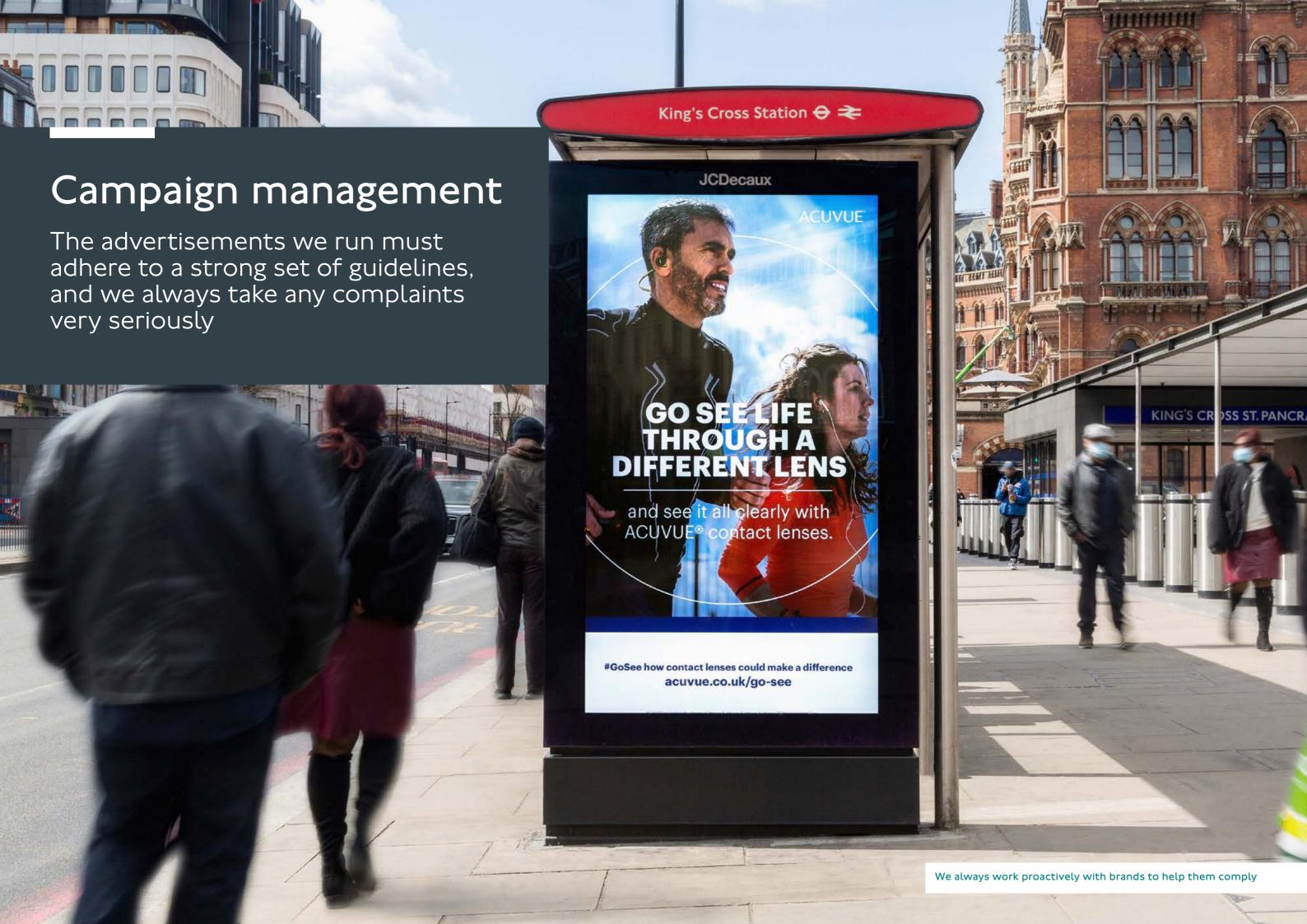
£12.05m

for all partnership work

complaints were received directly from our customers









## Advertising categories

### A breakdown of advertising run by market sectors

Category	Number of advertisements
Entertainment and leisure	1,029
Retail	1,207
Government, social and political	1,448
Business and industrial	624
Finance	403
Travel and transport	200
Clothing and accessories	189
Media	402
Drink	204
Computers	102
Cosmetics and personal care	98
Property	236
Electronics, household appliances and technology	24
Motors	65
Telecoms	105

Category	Number of advertisements
Food	126
Pharmaceutical	269
Household Equipment and DIY	130
Online retail	61
Leisure equipment	31
Mail order	111
Games and consoles	37
Household fast-moving consumer goods	21
Recruitment classified	11
Tobacco and accessories	10
Gardening and agriculture	13
Multi-advertisers	4
Miscellaneous	658
Total	7,818

### Managing our campaigns

# A breakdown of the complaints we received and the campaigns we have declined

The complaints we receive directly cover a wide range of topics. A small number of specific advertisements tend to generate the majority of the complaints we receive. Overall, we receive a low number of complaints given the large number of campaigns and individual advertisements we run.

#### Advertising campaigns that received complaints in 2020/21

Advertisement	Number of complaints
Azerbaijan	42
PS5	16
#RapefreeIndia	15
Bishop Climate	7
HEX	4
Pedal Me app	4
Dettol	3
NHS	3
Ocado	2
Surge	2
Dr. Martens	1
Christ the Redeemer statue (in Brazil)	1
Sahaja yoga	1
Proviz Sports	1

Advertisement	Number of complaints
Sky Cinema	1
TrustATrader	1
Tottenham Hotspur	1
DKNY	1
Indeed	1
UNCLE	1
BOL foods	1
Cabwise	1
DAME	1
Luno	1
Facebook	1
Octopus Energy	1
Not known	10
Total	124

For the sake of completeness, we also report on the number of complaints received by the ASA about advertisements on our estate.

In 2020/2I, the ASA received complaints about one advertisement that ran on our network, which is still under investigation.

### Complaints to the ASA

ASA Complaints Advertiser – 2020/21	Result of appeal
Surge	Under investigation

The authority to accept or decline campaigns is generally delegated to our advertising sales agents, who use our Advertising Policy as guidance. In a typical year they review around 35,000 advertisements. In a small number of cases they refer these to us for further review. Of those referred to us for a final decision, we declined 55 in 2020/21.

We work proactively and collaboratively with brands to help them alter their copy to comply with our policy. In many cases, particularly those advertising foods and non-alcoholic drinks that are high in fat, sugar or salt, alternative advertisements were submitted and accepted to run.

#### Reasons for declined advertisements

TfL Advertising Policy clause	Frequency
2.3(a) Likely to cause widespread offence or serious offence to reasonable members of the public	I
2.3(b) Depicts adults or children in a sexual manner or displays nude or semi-nude figures in overtly sexual context	2
2.3(c) Could reasonably be seen as distasteful, indecent or obscene	3
2.3(d) Could reasonably be seen as likely to cause pressure to conform to an unrealistic or unhealthy body shape	0
2.3(f) Depicts direct or immediate violence to anyone shown in the advertisement or could reasonably be seen as condoning, inciting or provoking crime, violence or anti-social behaviour	0
2.3(h) Contains images or messages which relate to matters of public controversy or sensitivity	5
2.3(j) Contains negative references to TfL's services, or those services provided or regulated by other members of the GLA Group	0
2.3(p) promotes food or non-alcoholic drink which is high in fat, salt and/or sugar ('HFSS' products)	38
2.3(q) unacceptable for some other substantial reason (which TfL will identify and explain as reasonably required)	6
Total	55

### Advertising Steering Group

The Advertising Steering Group was established in 2016 by direction of the Mayor to guide and inform the development of the TfL Advertising Policy. Since it was set up the Group has met regularly and reviewed a wide range of topics.

The Group met virtually in September 2020 and February 2021. In both meetings, the Group discussed the effects of the pandemic on TfL's advertising estate and TfL's advertising partners presented on complaints and notable advertisements on the network. In September 2020, members heard about the positive effects of the policy to restrict advertising for products high in fat, sugar or salt. Members also praised the previous Advertising Report and welcomed the topic of ageism for this year's Diversity in Advertising competition.

In February 202I, the advertising restrictions for products high in fat, sugar or salt was discussed, noting TfL's positive contribution to other cities and countries by assisting with the implementation of similar policies.

As this was the last meeting before the Mayoral election, the Chair Dr Mee Ling Ng thanked all the members for their valuable contributions and highlighted that the Group would be seeking new members after the election. Minutes are published on the Commercial Media page located on our website.

#### Membership group



**Dr Mee Ling Ng** TfL Board Member (Chair)



Heidi Alexander Deputy Mayor for Transport



Leah Kreitzman
Mayoral Director
for External and
International Affairs



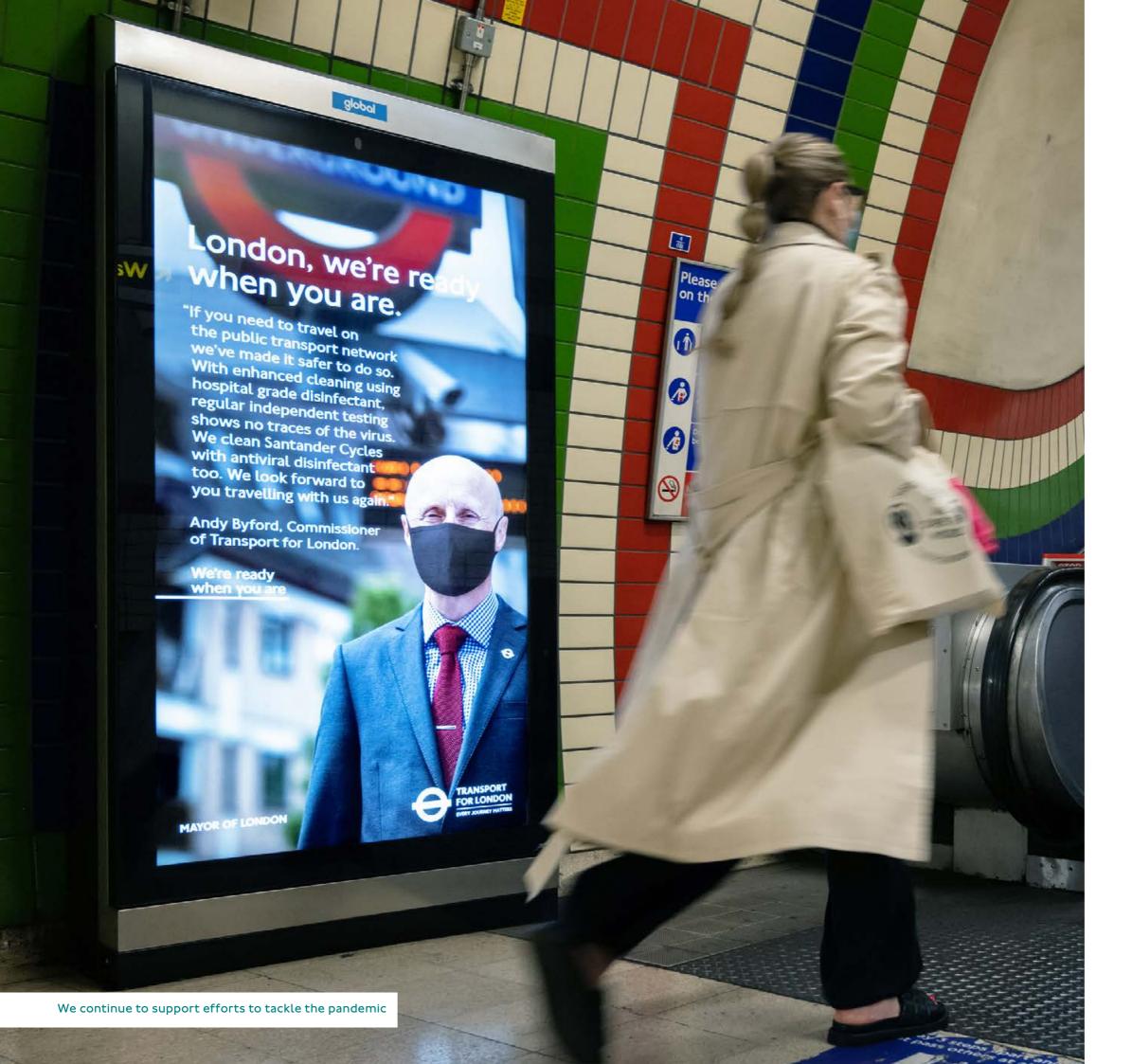
Professor Phillippa Diedrichs Professor of Psychology, University of the West of England



Tom Knox Chairman of MullenLowe and former President of the Institute of Practitioners in Advertising



Jeff Ingold Head of Media, Stonewall



### Contact us

To send feedback or to complain about an advertisement, visit tfl.gov.uk

Call our 24-hour contact centre on 0343 222 1234

Or write to:

TfL Customer Services 4th Floor 14 Pier Walk London SEI0 0ES

### **About Transport for London (TfL)**

Part of the Greater London Authority family led by Mayor of London Sadiq Khan, we are the integrated transport authority responsible for delivering the Mayor's aims for transport.

We have a key role in shaping what life is like in London, helping to realise the Mayor's vision for a 'City for All Londoners' and helping to create a safer, fairer, greener, healthier and more prosperous city. The Mayor's Transport Strategy sets a target for 80 per cent of all journeys to be made by walking, cycling or using public transport by 2041. To make this a reality, we prioritise sustainability, health and the quality of people's experience in everything we do.

We run most of London's public transport services, including the London Underground, London Buses, the DLR, London Overground, TfL Rail, London Trams, London River Services, London Diala-Ride, Victoria Coach Station, Santander Cycles and the Emirates Air Line. The quality and accessibility of these services is fundamental to Londoners' quality of life. By improving and expanding public transport and making more stations step

free, we can make people's lives easier and increase the appeal of sustainable travel over private car use.

We manage the city's red route strategic roads and, through collaboration with the London boroughs, we are helping to shape the character of all London's streets. These are the places where Londoners travel, work, shop and socialise. Making them places for people to walk, cycle and spend time will reduce car dependency, improve air quality, revitalise town centres, boost businesses and connect communities. As part of this, the Ultra Low Emission Zone scheme and more environmentally friendly bus fleets are helping to tackle London's toxic air.

During the coronavirus pandemic we have taken a huge range of measures to ensure the safety of the public. This includes enhanced cleaning using hospital-grade cleaning substances that kill viruses and bacteria on contact, alongside regular cleaning of touch points, such as poles and doors, and introducing more than 1,000 hand sanitiser points across the public transport network.

Working with London's boroughs we have also introduced Streetspace for London, a temporary infrastructure programme providing wider pavements and cycle lanes so people can walk and cycle safely and maintain social distancing.

At the same time, we are constructing many of London's most significant infrastructure projects, using transport to unlock much needed economic growth. We are working with partners on major projects like the extension of the Northern line to Battersea, Barking Riverside and the Bank station upgrade.

Working with Government, we are in the final phases of completing the Elizabeth line which, when open, will add I0 per cent to central London's rail capacity. Supporting the delivery of high-density, mixed-use developments that are planned around active and sustainable travel will ensure that London's growth is good growth. We also use our own land to provide thousands of new affordable homes and our own supply chain creates tens of thousands of jobs and apprenticeships across the country.

We are committed to being an employer that is fully representative of the community we serve, where everyone can realise their potential. Our aim is to be a fully inclusive employer, valuing and celebrating the diversity of our workforce to improve services for all Londoners.

We are constantly working to improve the city for everyone. This means using data and technology to make services intuitive and easy to use and doing all we can to make streets and transport services accessible to all. We reinvest every penny of our income to continually improve transport networks for the people who use them every day. None of this would be possible without the support of boroughs, communities and other partners who we work with to improve our services.

By working together, we can create a better city as London recovers from the pandemic and moves forward.

