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WE MADE THAT
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OLD KENT ROAD BUSINESS SURVEY UPDATE
FINDINGS REPORT 04-11-2019

Old Kent Road Business Survey Update
Findings Report

Commissioned by:
The London Borough of Southwark

Written and produced by:

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WE MADE THAT
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With thanks to Vital OKR & Carmel King

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EXECUTIVE SUMMARY

The Old Kent Road (OKR) is one of the last remaining sites within close proximity to Central London that has retained a rich layer of integrated industrial and commercial uses alongside housing. In 2015, the Old Kent Road Employment Study identified 748 businesses in the Old Kent Road area, providing 9,500 jobs in over 1 million sqm of employment floorspace.

Business and employment figures gathered during the 2019 survey update confirm that Old Kent Road is a dense and diverse location. In early 2019, the Old Kent Road area is home to at least 716 businesses employing more than 10,035 people making it a significant employment area and site servicing the city and particularly Central London. With more than 590,000 sqm of employment building floorspace, including 360,000 sqm of industrial building floorspace and an additional 168,636 sqm of operational yard space, it remains the largest stock of industrial land in the inner London Boroughs.

In terms of recent evolution, the Old Kent Road area has seen its number of businesses slightly decrease since 2015. However, the total number of jobs in the Old Kent Road area does not seem to have been impacted; on the contrary, the number of jobs has increased and the low level of vacancy within available industrial stock continues. More specifically, its industrial jobs that have grown, showing an important and dynamic industrial economy.

Overall, the local economy has not radically shifted. However, ongoing development and investment across the OKR area is continuing to gradually transform the local and industrial economy. This report details the findings from the audit and identifies key changes since 2015. It provides a fine-grain understanding of the composition of the local economy and physical make-up of the Old Kent Road area to inform future policies and development in the context of the AAP.

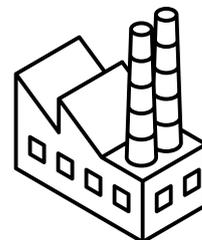
The 2019 Old Kent Road Business Survey Update shows:



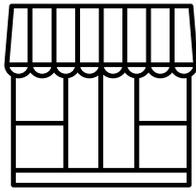
716 businesses
(4.5% drop since 2015)



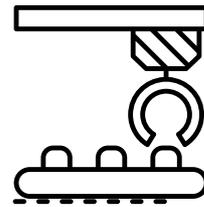
10,035 jobs
(5.5% growth since 2015)



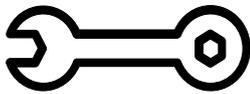
592,568 sqm
of building employment
floorspace & 168,636 sqm of
operational yard space



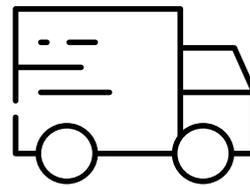
**13% of retail units are vacant
(1% increase since 2015)**



**The manufacturing sector have
grown since 2015, including
23 new businesses in the area**



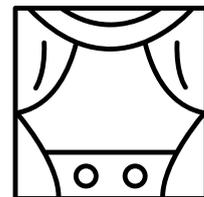
**Declining sectors and jobs
concerns in vehicles related
activities, construction and
wholesale sectors**



**Activities such as transport,
distribution and storage have
slightly declined, but still
provides 22% of the jobs**



**Growth in sectors including
food-related activities
such as breweries and food
manufacturing**



**Creative production and
services clusters, supporting
London's wider creative
economy, have strengthened**

1.0
INTRODUCTION &
METHODOLOGY



1.0

INTRODUCTION & METHODOLOGY

1.1 Overview

Introduction

We Made That were commissioned by the London Borough of Southwark (LBS) to carry out an update to the 2015 Old Kent Road Business Survey. The study provides insight into changes in the area the Old Kent Road (OKR) economy within the last four years by comparing data results for both surveys.

This study provides detailed and up-to-date information on the businesses and collective local economy of the OKR area and its surrounding neighbourhoods. Information collected through this business survey seeks to help make sense of the OKR area's local economy by recording all job-generating uses across the area's diverse geographies. The evidence and analysis from this work will complement and inform LBS' work, providing evidence to determine the direction of future policies in the Area Action Plan.

Along with the Area Action Plan, this study will inform strategies and policy for workspace provision, business support and help to support sustainable regeneration in these complex localities.

Policy Context

LBS has recently concluded consultation on the second draft of the Old Kent Road Area Action Plan (AAP). The AAP envisages the transformation of the Old Kent Road and surrounding areas over a period of 20 years, including the provision of around 20,000 new homes and doubling the number of jobs. The Employment Study of 2015 found there were around 9,500 jobs in the opportunity area as a whole, across 748 businesses.

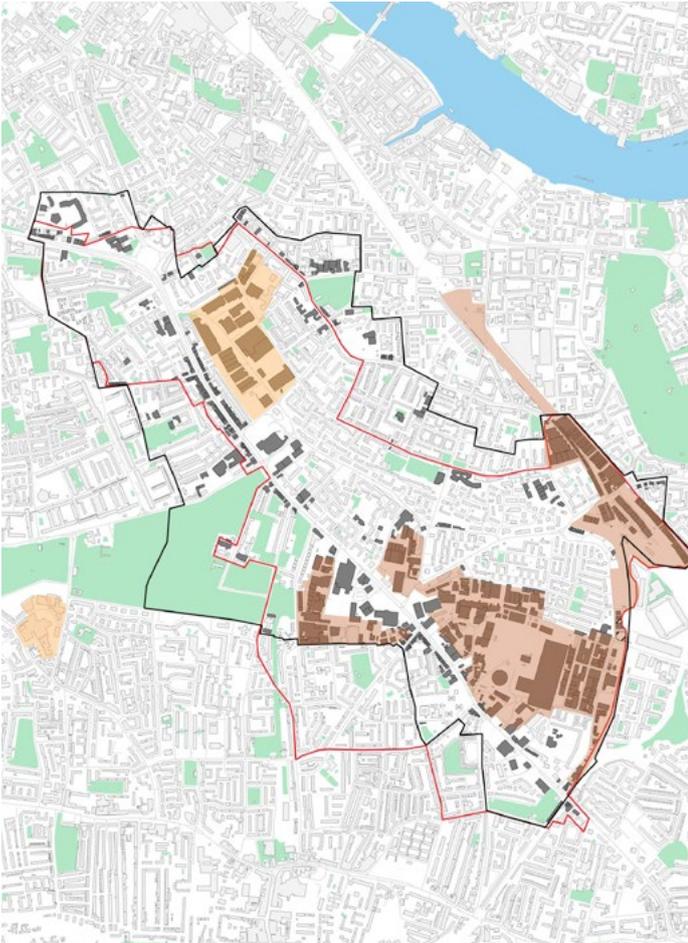
The AAP aims to create a new high street along the length of the Old Kent Road including a new retail shopping environment contributing to a new town centre. Many of the current site allocations proposed as part of the AAP include designated industrial land under the current Southwark Local Plan including numerous small businesses. A large part of these employment land are proposed for release in the New Southwark Plan (currently at

submission stage). Design guidance in the revised AAP requires an innovative approach to mixing industrial space with residential accommodation on the same plot. This study provides a focused understanding of the current mix of businesses that may potentially seek reprovision via industrial intensification.

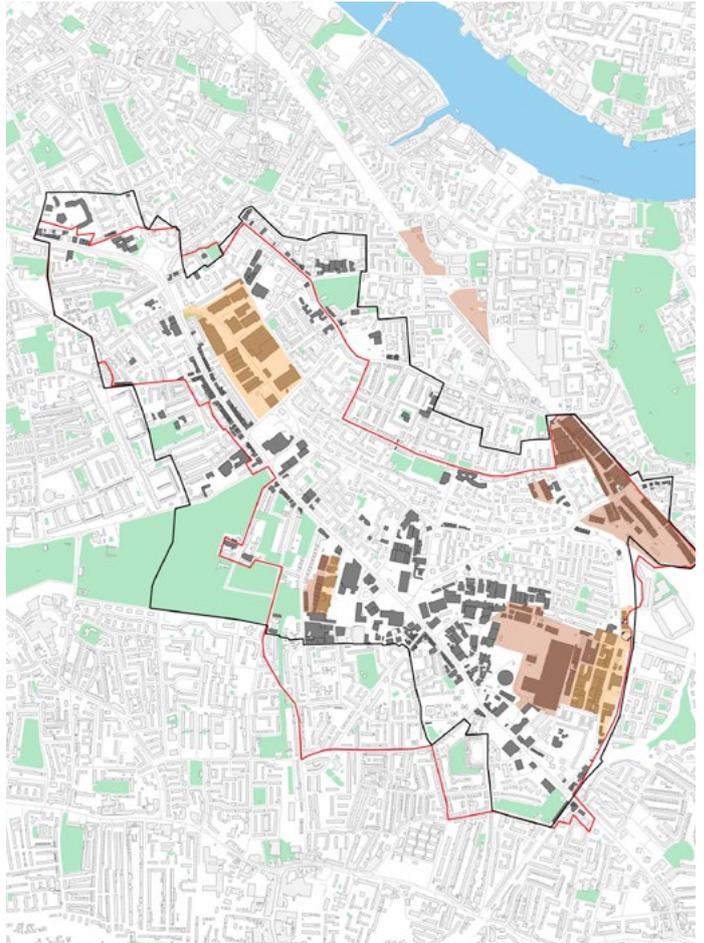
Approach

This work makes use of a mix of qualitative and quantitative research methods to provide a careful and nuanced understanding of the OKR area's local economy. The study builds upon previous local business surveying, as well as previous consultation and employment land reviews of the area. While the findings reveal a well-occupied employment area, this study should be understood as a snapshot in time, capturing uses and premises in operation in early 2019.

The study area is similar to the 2015 study to allow for comparison, but includes five individual sub-areas, mapped on page 13. These incorporate all the Site Allocations identified by the AAP which will be a particular focus.



Map 1. Designated employment land in the Local Plan (2007)



Map 2. Proposed designated employment land in the New Southwark Local Plan (submission stage)

KEY

-  Study area boundary
-  Area Action Plan (AAP) boundary
-  Strategic Industrial Location (SIL) /Strategic Preferred Industrial Location (SPIL)
-  Locally Significant Industrial Locations (LSIS)
-  2019 identified employment buildings

1.2 Study methodology

The research and analysis informing the study took place across three stages:

1. Observational research & data gathering

The audit was carried out from the month of January to March 2019. Basic businesses information was gathered using a door-to-door assessment and accompanying structured interviews. Given the typically lower level of end-user interaction, industrial-type businesses can have limited online presence and purely desk-based research is likely to miss the exact scope and breadth of businesses on site, despite these businesses being integral to the character of the area and important contributors to local economy. For this reason, on-site research was prioritised.

Every business or employment site has been mapped by a team of researchers. This includes retail, food and drink, and leisure uses, where employees are present on a regular daily basis. The following data was collected by this observational study:

- Name of business
- Address
- Number of units occupied
- Primary activity
- Type of space occupied
- Estimated number of employees
- Associated yard space / parking provision

In addition to the data gathered during site visits, businesses were allocated a Standard Industrial Category (SIC) code based on its primary business activity. These codes were used, in conjunction with on-the-ground knowledge of operations to group businesses into 'business activity' categories, as defined in the 2015 study, which have been used to analyse the prevalence of different sectors across the study sites and as the basic of comparison with other industrial sites in London.

Additionally, each building within the study boundaries was assigned a building type, based on estimated size, in order to better classify and understand the built form and urban fabric that

host the range of businesses across the study site as well as to identify vacancy.

Alongside this more quantitative audit, researchers carried out a number of longer interviews with 70 businesses. These interviews collected more detailed information on the number of employees, customer and supplier locations, as well as more qualitative information on individual business aspirations, detailed below.

2. GIS mapping & data analysis

Data gathered from the on-site surveys has been entered into a central database and analysed using GIS mapping software to build up a picture of business activities, building types, employment densities and footprint ratios across sites.

Employment density was calculated using known and estimated employment numbers for every business located within the boundaries of each individual building footprint or business unit. Estimated employment numbers were based on building type, size and business activity and sense-checked against the 2015 study. This process also verified the size categorisation of each business's workspace unit.

3. Detailed surveys

Alongside this quantitative data collection, detailed surveys aim to provide further information on emerging employment and workspace trends in the area and to provide more detailed insights into the type, size and activity of businesses operating across the OKR's different sub-areas. Priority was given to surveying the businesses inside the site allocations, followed by the designated industrial areas and then the existing high street.

Through the establishment of the OKR Business Network and consultation hub, LBS had already established a format for, and gathered insights from, a selection of businesses. These insights were incorporated and built-upon through the detailed surveying. The Business Network was also promoted



The OKR area is a mix of warehouse, studio and workshop complexes, industrial estates and office buildings. Redevelopment and regeneration of the area is ongoing.



The OKR area host an increasing number of managed workspaces and multi-occupancy buildings.



The OKR area is home to many small-scale food & drink, textile and fabrication businesses.

to businesses through leaflets that were handed out by researchers. Through the Business Network, this detailed evidence base will be able to be grown beyond this commission.

4. Site allocation analysis

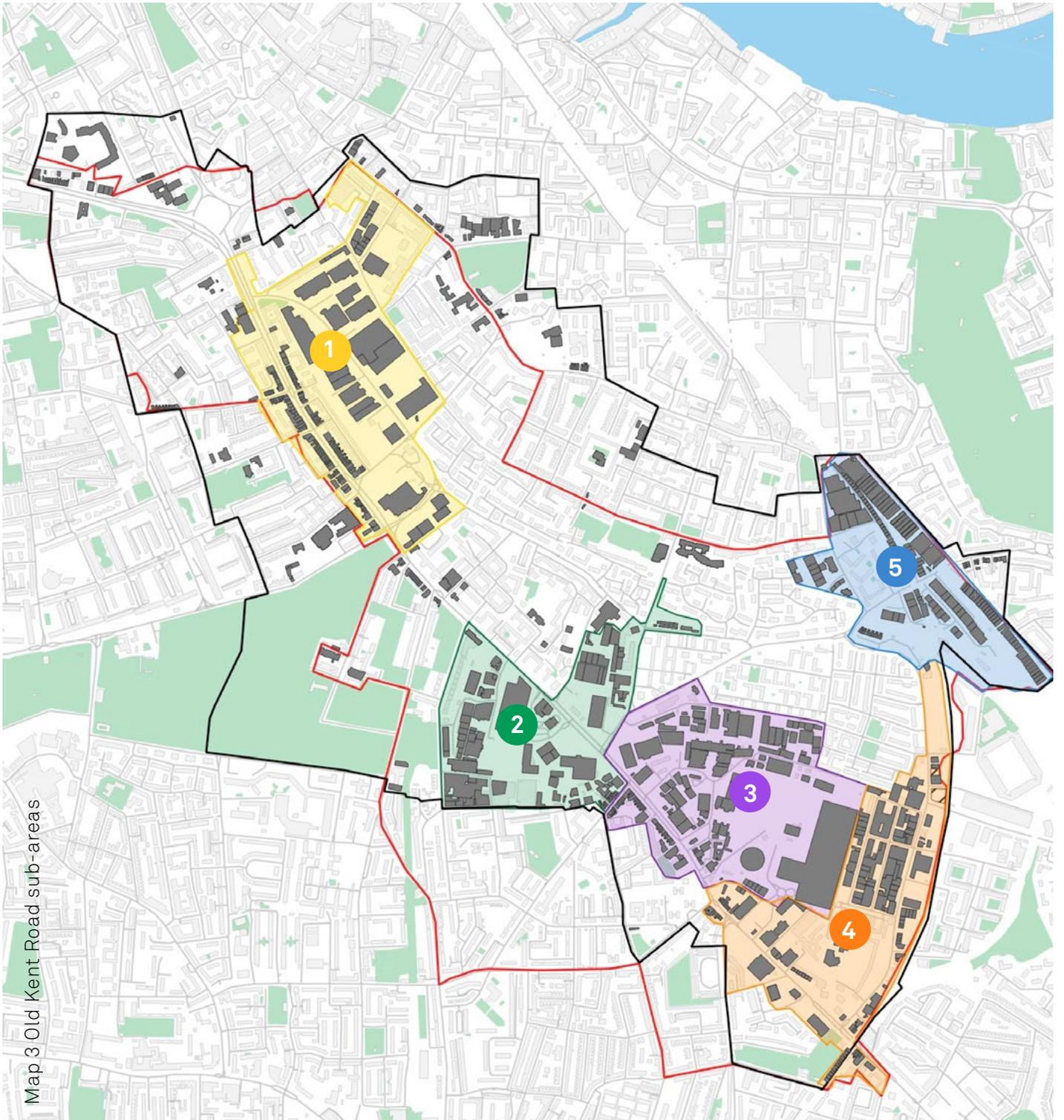
The study provides key employment floorspace figures for all the designated site allocations within the AAP, as well as the Strategic Industrial Land in South Bermondsey. These have been carefully sense-checked against the Valuation Office Agency data to allow for more accuracy,

Geographies

The study area is similar to the 2015 study to allow for comparison but includes five individual sub-areas, mapped on the opposite page. These incorporate all the Site Allocations identified in the Old Kent Road Opportunity Area. As a first step, this report will present the survey results for the whole study area. Greater detail will then be provided at the sub-area level. The identified sub-areas concentrate 80% of the total businesses located in the Old Kent Road area.

KEY

-  1. Mandela Way, Crimscott Street and Old Kent Road (North)
-  2. Cantium Retail Park and Marlborough Grove
-  3. Sandgate Street, Verney Road and Old Kent Road (South)
-  4. Hatcham, Ilderton and Old Kent Road (South)
-  5. SPIL 1 South Bermondsey and SPIL 2 Admiral Hyson Industrial Estate
-  Study area boundary
-  Area Action Plan (AAP) boundary
-  2019 identified employment buildings



Map 3 Old Kent Road sub-areas

1.3 Definitions

This study has adopted a set of activity and workspace definitions in its working and reporting, based on previous work within the OKR area, as well as commonly adopted definitions within economic and workspace research:

Workspace building typologies

The following workspace categories have been used to define and map workspaces in the OKR area. These categories refer to spatial characteristics (access, scale, servicing), rather than activity. It is possible, for example, for food & drink related businesses to be recorded in re-purposed industrial spaces.

Building type	Definition
Purpose-built industrial shed	Typically double ceiling height (6-8m), loading bay, provision on ground floor
Pre-1945 factory, depot, or warehouse	Older building stock of various forms for industrial uses
Post-1945 industrial building	Post-war building stock of various forms for industrial uses
Office building	Typical lower ceiling (2.9 - 4.4m), provision possible on any floor
Railway arch	Typically an industrial space, but can be converted to other uses
Small retail unit	Typically accommodating A1 uses, on ground with street-frontage
Retail development with car parking	Supermarkets, wholesalers and 'big-box' stores
School	School building of any type
Yard space	Yard space used for the primary operations of a business, typically with a small or no ancillary building required

Business activities

The following activity categories and associated SIC code grouping have been used to define and map economic sectors.

Activity group	Example SIC codes
A - Manufacture: metals and machinery	289 Manufacture of other special-purpose machinery
B - Manufacture: food, beverages, and catering	107 Manufacture of bakery and farinaceous products
C - Manufacture: other	133 Finishing of textiles
D - Printing and publishing	181 Printing and service activities related to printing
E - Utilities	381 Waste collection
F - Vehicle sale and repair	451 Sale of motor vehicles
G - Construction	422 Construction of utility projects
H - Wholesale: food	463 Wholesale of food, beverages and tobacco
I - Wholesale: other	466 Wholesale of other machinery, equipment and supplies

Activity group	Example SIC codes
J - Transport and storage	521 Warehousing and storage
K - Services: education	852 Primary education
L - Services: public	873 Residential care activities for the elderly and disabled
M - Services: professional	691 Legal activities
N - Services: other	551 Hotels and similar accommodation
O - Retail	471 Retail sale in non-specialised stores
P - Restaurants, cafes, takeaways	561 Restaurants and mobile food service activities
Q Arts, culture, leisure and sports	900 Creative, arts and entertainment activities
R - Faith	N/A
S - Vacant	N/A
T - Unknown	N/A

Multi-occupancy buildings

Given the OKR's particular legacy of industrial buildings and current provision of collective and shared workspaces, the study has worked to consider how to treat these spaces for the purposes of the business survey in order to ensure the valuable contribution they make to the area's economy is captured. This consistent approach captures each studio building as a business, but one which is dense in its workspace capacity. This is to reflect the fact that not every individual studio is necessarily a 'business' (in terms of primary place of work or commercial output) but that these are vital sites of work / creative production in the area.

1. Creative Workspace: These spaces specifically target a subset of creative tenants with bespoke production needs. They provide shared technical / creative facilities (e.g. recording studio, darkroom, workshop), often alongside a studio or office unit offer. These spaces are typically accessible through renting time/space or on a more long-term lease structure. Workspaces must be operated by a provider of some form in order to be included in this category - workspaces which are tenanted directly from a landlord by a single creative organisation, for example, would not be included in this data. Creative studio complexes are mapped and counted as one business (the workspace provider) with multiple occupants (determined by the number of people working from that site). Business activity is categorised under Q - Arts, culture, leisure and sports.

2. Managed Workspace: These spaces offer workspace on flexible terms without any particular restriction on use. These spaces are typically accessible through renting time/space or on a more long-term lease structure. Workspaces must also be operated by a provider of some form in order to be included in this category - Managed workspace complexes are mapped and counted as one business (the workspace provider) with multiple occupants

(determined by the number of people working from that site). Business activity is categorised under M - Services: professional.

Occupiers of these multi-occupancy buildings have been recorded where possible and the data collected during the survey are included in the database accompanying this report.

Some creative and managed workspaces such as artist studios may be categorised as light industrial workspace (Use Class B1c) as per the Use Classes Order.

Quantifying employment floorspace

The study has worked to quantify the OKR employment floorspace. This is particularly important to consider in the context of the regeneration of the area and the new London plan which reflects a new attitude towards London's designated industrial sites; changing from a process of managed release, to a stated requirement for "not net loss of industrial floorspace". During the survey, researchers have attributed a floorspace multiplier to each building. All the data have been then mapped through a GIS software, allowing the calculation of building footprints. Researchers have then cross-checked the floorspace figures with the Valuation Office Agency data to ensure no significant discrepancies.

In the Old Kent Road area, employment spaces - particularly those hosting industrial activities - are often supported by external spaces and the study has worked to consider how to incorporate and quantify them. The following yard space categories have been used:

- Car park
- Operational yard space:
 - Storage
 - Servicing (industrial)
 - Servicing (retail)
- Public/green space
- Private space/deadspace
- Vacant yard space

'Operational yard space' is defined as the external space needed by a given industrial occupier for their core business activity. This space is typically provide by a yard (covered, or uncovered) and is often use for storage, production, or processing activities which directly support a business' primary activity. This includes servicing and circulation space for vehicles which enable the movement of goods related to the core business activity.

Operational yard space can be calculated as follows:

Total site area
minus Building footprint
minus Parking (staff and customer)
minus Green and other amenity space
minus Deadspace (redundant & required)

= Operational yard space

It has been noted that public and street spaces across the Old Kent Road area are sometimes informally used by businesses that have servicing or storage needs but don't have a suitable working yard space. These informal street working spaces have not been mapped but their existence should not be undervalued.

2.0

OLD KENT ROAD
AUDIT FINDINGS





Weber Industries

2.1

OVERVIEW OF LOCAL ECONOMY

716 businesses

+ 287 artists/creative studios

10,035 employees

**592,568 sqm
of employment floorspace**

**168,636 sqm
of operational yard space**

A combination of on-the-ground business surveying, observational work and engagement with workspace providers has captured 659 businesses in the OKR study area. This total, in combination with an estimated minimum of 63 businesses based in managed workspace (as defined previously), suggests that there are at least 716 businesses in the survey area. Furthermore, the OKR area is home to 287 artists studios which host and support a range of individual non-commercial artistic activities and start-up and SME enterprises.

The OKR area is also home to 45 faith buildings as well as 15 school and education buildings. In total over 862 workspace sites were identified through the on-the-ground business surveying, including 140+ vacant sites.

In terms of employment, the survey has recorded 10,144 employees working in the OKR area. 94% are working in businesses located within the AAP and the site allocations concentrate 70% of the employment of the all study area.

Looking at the employment floorspace, the on-site mapping have recorded 592,568 sqm of employment floorspace within a range of different buildings. In

addition to this, 168,636 sqm of operational yard space - used for storage or servicing, as defined in the introduction - has been recorded. There is also 103,735 sqm of car parking space supporting the businesses in the OKR area.

Ongoing development and investment across the OKR area is continuing to transform the economy and employment landscape in this part of London and a diverse mix of economic activity remains present. Through this period, there has been churn of both workspace and their resident businesses whilst start-ups and newcomers to the area have arrived from different places, finding new opportunities. Excluding the businesses hosted within managed workspaces from the analysis, 389 businesses have remained since 2015, while 194 have been newly identified in this study. Many businesses have changed hands, particularly within small retail spaces, while examples exist of new businesses and new workspace use.

Business activity

A range of business activities dominate different aspects of the OKR economy. In terms of the number of businesses, retail (14%), restaurants (9%) and services (9%) are the clearly dominant sectors. These combined sectors continue to have a strong presence on the high street which still hosts a large number of small retail and restaurant businesses (Retail, Restaurants & Cafes), as well as pharmacies (Services: Public), accountants and legal services (Services: Professional), launderettes, money transfer services and various repair shops (Services: Other). Other sectors are relatively evenly distributed, while Transport and Storage at 4% (7% in 2015) remains the other dominant business sector. These businesses include postal and courier firms such as Yodel, DPD and Royal Mail around Mandela Way, but also specialist art storage businesses such as Constantine and Timothy Taylor Gallery to the south of the study area. Churches and other faith establishments, whilst slightly in decline, remain present with 45 sites counting for 5% of business sites (55 sites, or 7% of all businesses in 2015).

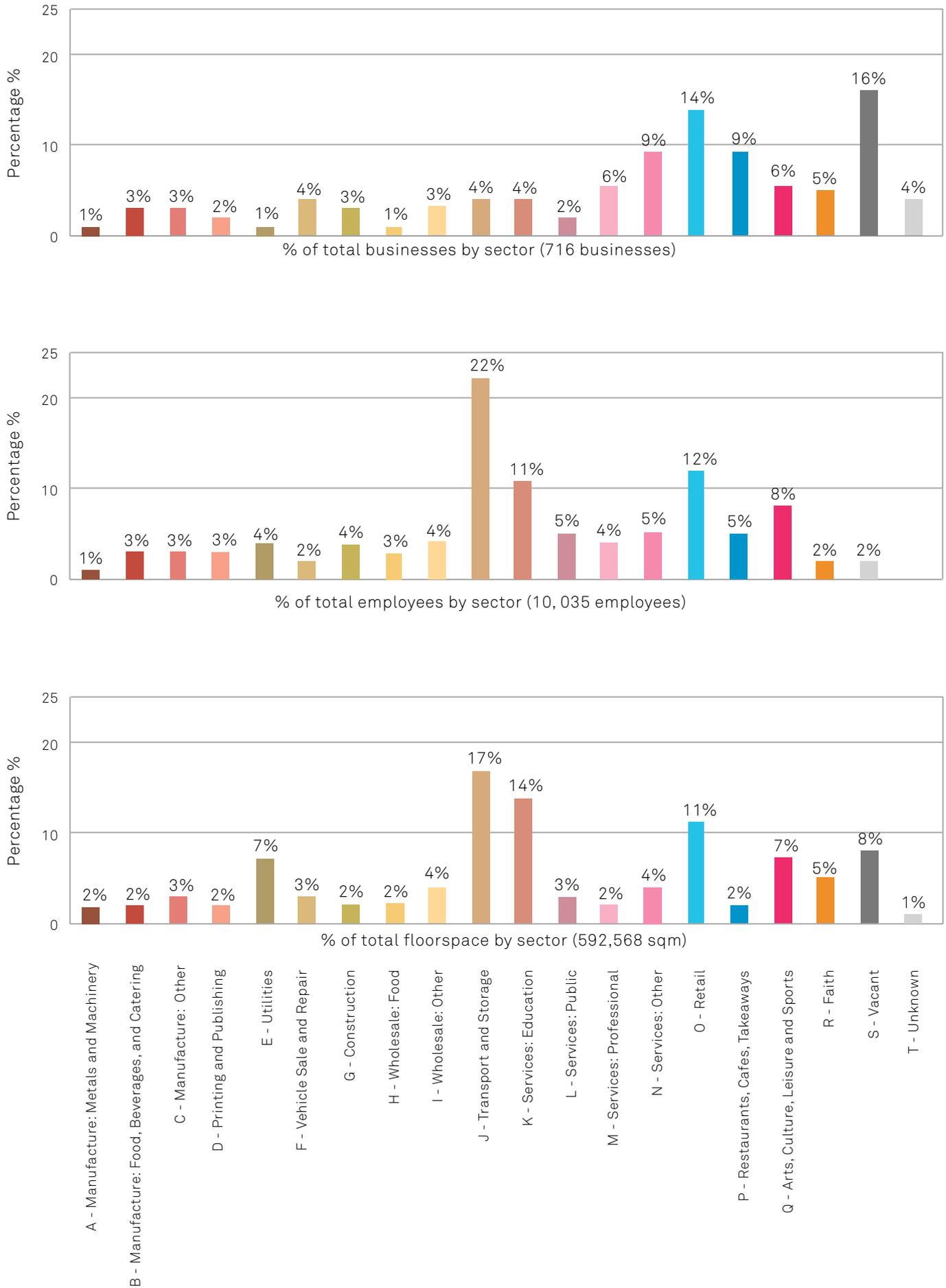


Fig 1. Overview of local economy

In terms of share of employment, Wholesale, Transport and Storage sectors continue to dominate with 29% of employment (33% in 2015), with the majority of these jobs being found in the Transport and Storage Sector at 22% (23%). A relatively small number of transport, haulage and courier firms, as well as larger wholesalers, continue to be important employers in the area, while a number of smaller size transport and storage businesses have moved from the area since 2015. While Retail sectors continue to be dominant in terms of the number of businesses, they also maintain a good proportion of the overall employment, however declining slightly to 12% (15% in 2015). A larger proportion of people can be seen working in Arts, Culture, Leisure and Sports at 8% (5% in 2015) potentially due in part to the approach this study takes to creative workspace. Creative workspace providers such as V22, SPACE studios, Capital Studios and the James Glancy design centre have been found to host a density of activity that is captured through the number of people working in this sector.

Analysis of business numbers and floorspace helps to illustrate how different sectors make use of workspace across the OKR area. The floorspace use of each of these sectors represents either the scale of space needed for their operations or, as with retail, the number of businesses present.

While representing only 4% of the total businesses in the OKR area, the Transport and Storage sector occupies 22% of building floorspace, reflective of the spatial requirements of these businesses that are hosted in large industrial sheds. Their footprint is even more important taking into account their associated operational yard spaces. These businesses are by nature land-hungry activities and often require outdoor yard space, 24/7 delivery and servicing access and large land parcels for servicing needs.

Education and Retail sectors are also dominant in terms of premises size, representing respectively 14% and 11% of the total employment floorspace in the OKR area (excluding yard space). Food & drink retail businesses occupy smaller proportions of floorspace relative to how common they are

across the OKR area, reflective of the typically small, retail-type units they occupy. Creative uses occupy a relatively small proportion of floorspace (7%) however, the sector is growing since 2015 (4%) reflective of the large-scale managed workspaces that have moved recently to the area.

Workspace

Considered together, industrial buildings account for 65% of the total building floorspace, purpose-built industrial shed under the form of standalone warehouses, taking up the highest proportion of space. Retail floorspace, under the form of high street retail units or large standalone retail sheds, makes up 12.5% of the total employment floorspace. School makes up of 13% of the total employment floorspace which is also relatively significant.

Looking at industrial buildings, the division of building types into age groups accounts for the variation in stock within the industrial building category but also acts as a timeline allowing to identify areas of relatively recent development and investment. Clustering of modern industrial buildings in Mandela Way and along Glengall Road is an example of a more recent area of investment within the overall study site. Clusters of pre-45 buildings can be found around Saint James Road and around Bianca Road/Latona Road (e.g. Gadmon Industries). The majority of employment floorspace is made-up of post-45 industrial buildings and purpose built sheds which are largely found across the site's various industrial estates.

The combination of these typologies and floorspace offers is what sustains the area's business base diversity. The OKR area has seen recently a number of new small units being delivered through the sub-division of existing industrial building stock. Typically these refurbishments have been undertaken by workspace providers who then rent out spaces to a mix of occupiers. Quality of premises and sites vary across the study area but there is little evidence of investment in new industrial premises. Speculative development is largely limited to retail and residential uses.

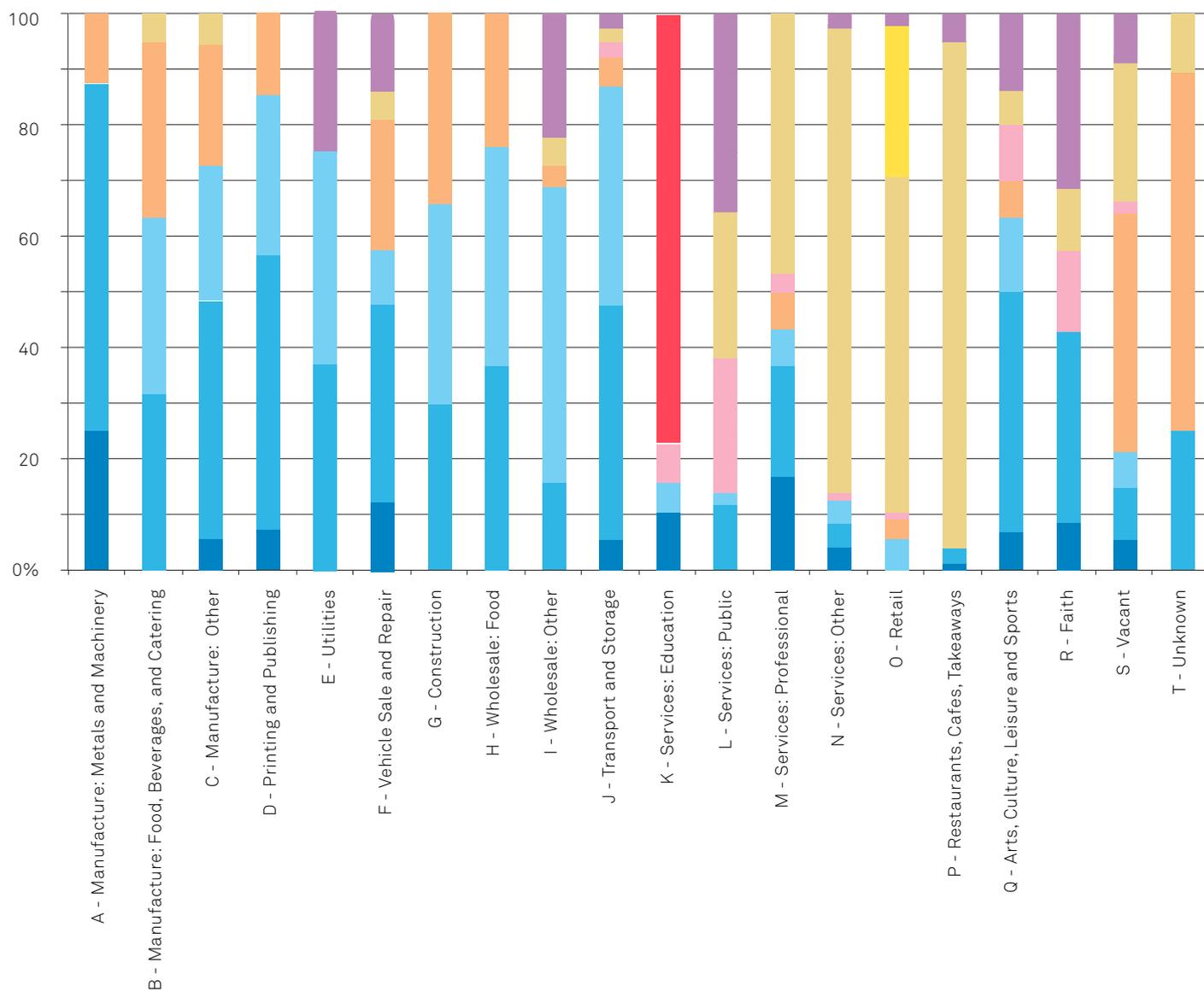


Fig 2. Business sectors by workspace typologies (Excl. yard space)



Supporting yard spaces

In the Old Kent Road area, employment spaces, and particularly those hosting industrial activities are often supported by external spaces and the study has worked to consider how to incorporate and quantify them. As defined in the introduction, operational yard space is often use for storage, production or processing activities which directly support a business' primary activity. Car parks are also important spaces to take into consideration when quantifying employment floorspace.

Figure 5 shows that the most prevalent type of yard space are those used for servicing purposes. Private yard space and deadspace, that are typically non-accessible to the public or not used, are also important. Looking at operational yard spaces only, yard spaces are mainly used for industrial servicing uses. In total, the Old Kent Road area hosts more than 168,636 sqm of operational yard space, counting for more than a third of the total employment floorspace. Considering both supporting operational yard spaces and employment buildings, the total employment floorspace in the Old Kent Road area is more than 761,204 sqm.

The importance of yard spaces in the OKR area, and especially the ones used for industrial servicing, is largely related to the need for large loading bays and large good vehicle access for the prevalent retail and wholesale warehousing as well as logistic activities.

Figure 4.1 shows the distribution of building types by floorspace including parking and operational yards. Operational yards account for 22% of the total floorspace. This proportion is made up of large-scale servicing areas but also small scale servicing areas related to individual warehouses in industrial estates as well as smaller-scale yards accommodating storage of materials or product in the case of manufacturing or construction businesses.

Finally, figure 4.2 shows the distribution of industrial floorspace by building type, including operational yard spaces.

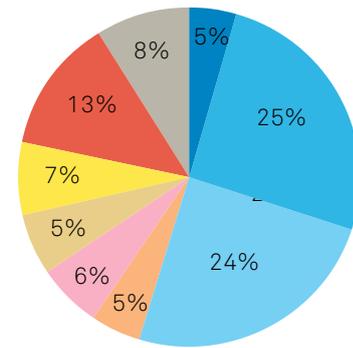


Fig 3 Distribution of total employment floorspace (excl. supporting yard spaces) by building type

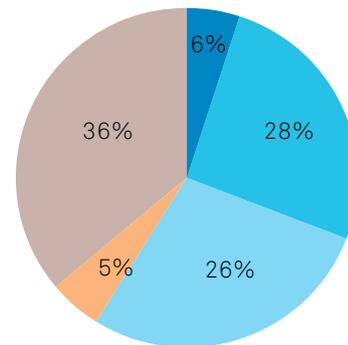


Fig 4 Distribution of total industrial employment floorspace by building type including supporting operational yard spaces

KEY

- Pre-1945 factory, depot, or warehouse
- Post-1945 industrial building
- Purpose-built industrial shed
- Railway arch
- Railway arch
- Small retail space
- Operational yard space: storage and industrial servicing

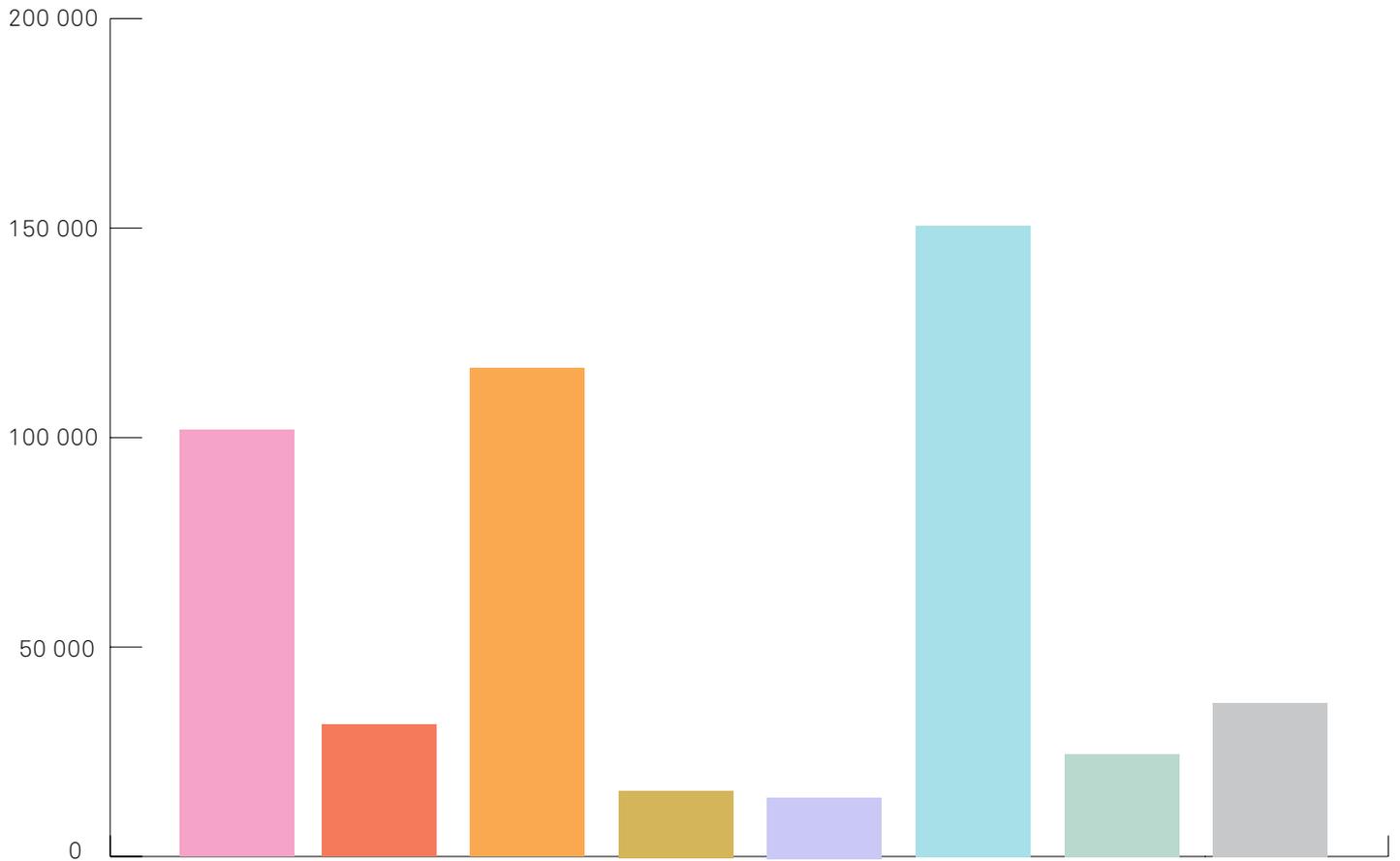


Fig 5 Distribution of total yard spaces by type in the OKR area (513,131 sqm)

KEY

- | | | | |
|---|--|---|--|
| ■ Car Parking | ■ Operational: servicing (industrial) | ■ Public open space | ■ Utilities |
| ■ Operational: storage | ■ Operational: servicing (retail) | ■ Private open space / deadspace | ■ Vacant |

Vacancy

Of all those premises surveyed, 16% were recorded as vacant. Railway arches are the most common vacant workspace typology (41% of total vacant workspaces) across the OKR area. Vacancy for the railway arches typology is due to the current unavailability of approximately 30 premises along Corbett's Lane and Almond Road due to rail works and therefore the overall workspace vacancy in the Old Kent Road area should be nuanced. Excluding those unavailable premises, 10% of vacancy is recorded in the OKR area.

Small retail spaces are experiencing a relatively high level of vacancy, especially towards the southern part of the Old Kent Road. This can be understood both in relation to the poor quality of the available spaces, as well as in relation to the suitability of some of the spaces which have not appealed to potential tenants (e.g. size, fit out, conditions). Looking at industrial spaces, the vacancy is low and mainly concerns very large premises, buildings in poor conditions or premises that are not available to let in anticipation of redevelopment, This last distinction can be well observed in the south and north part of Sub-area 2, and along Ilderton Road in Sub-area 5 with the presence of buildings currently vacant in anticipation of forthcoming redevelopment schemes. There are also large vacant A1 units on the ground floor of new residential developments (along Old Kent Road for example) that are categorised under 'Other' in the adjacent graphs. Some of them have been vacant for more than three years.

While there is very little recorded vacancy of either small industrial units or office spaces in most of the OKR area (a part from those that have been recently vacated by tenants under landlords orders in anticipation of development), the sub-area 4 - and particularly around Hatcham Road - records some vacant units. There are also a couple of units that have been filled by faith organisations.

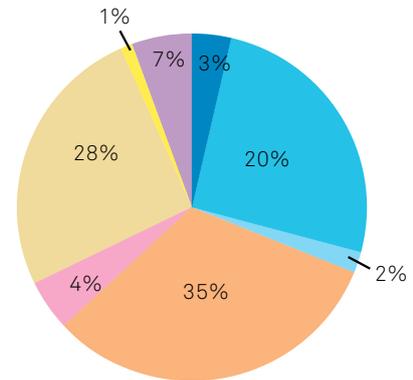


Fig 6.1 Distribution of vacant spaces by workspace typology

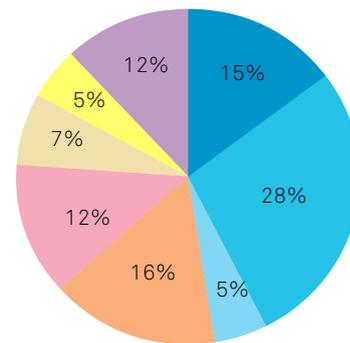


Fig 6.2 Distribution of vacant floorspace by workspace typology

KEY

- Pre-1945 factory, depot, or warehouse
- Retail development with car parking
- Post-1945 industrial building
- School Building
- Purpose-built industrial shed
- Other
- Railway arch
- Office building
- Small retail space

Employment densities

The extensive geography of the OKR area, in combination with the scale of ongoing redevelopment projects, makes for a varying landscape of employment densities. Employment figures based on the surveying work illustrate exactly how different employment spaces are being occupied. The density mapping included in this report is illustrative of how different workspaces and sectors are delivering employment density.

The density mapping provided in the following pages serves as a useful guide in understanding exactly how certain locations, workspace typologies and existing workspace providers are accommodating employment to the OKR area.

High levels of employment density are typically found clustered at various locations across the study area. Further analysis of employment density per building type shows that railway arches and post-industrial buildings tends to host the densest employment activities.

Generally, high employment densities are found within buildings that have been subdivided in smaller workspace units hosting a wide range of businesses. However, it is noted that purpose-built industrial sheds are particularly dense in the Old Kent Road area considering their typical occupiers and spatial make-up. This reflects the presence of very large employers in these sites.

Analysis of employment densities across retail units show that high street retail unit in OKR have an employment density averaging 4 sqm per employee. The area also features a number of key national retailers such as Tesco and Asda that contributes to the high employment density within large retail units on site, as these individual businesses usually have a large number of employees and some businesses operate 24/7.

Table 1 Employment density

Building type	Average sqm/employee
Pre-1945 factory, depot, warehouse	80 sqm/employee
Post-1945 industrial building	110 sqm/employee
Purpose-built industrial shed	120 sqm/employee
Railway arch	53 sqm/employee
Office building	31 sqm/employee
Retail park with associated car park	104 sqm/employee

Identified changes

Ongoing development and investment across the OKR area is continuing to transform the economy and employment landscape in this part of London and a diverse mix of economic activity remains present. Looking across businesses identified in 2015 and then those in 2019, there has been churn of both workspace and their resident businesses whilst start-ups and newcomers to the area have arrived from different places, finding new opportunities. Excluding the businesses hosted within managed workspaces from the analysis, more than 190 businesses have moved to the Old Kent area since 2015 while 265 businesses identified in 2015 seemed to have left the area since then. Many businesses have changed hands, particularly with small retail spaces, while examples exist of new businesses and new workspace use. Some small retail spaces and office buildings have also been converted into residential use under Permitted Development rights since 2014.

Looking at the evolution in terms of employment between 2015 and 2019, it seems that the number of jobs has increased with 9,500 employees identified in the 2015 study and 10,144 identified in 2019. These figures need to be treated with caution: survey results and particularly employment figures can be affected by response bias. However, particular attention has been given for the 2019 employment figure to be as accurate as possible by double checking employment numbers with all the significant employers of the OKR area.

While the number of employees has grown, the number of businesses has decreased to 715 businesses identified in 2019, a 4.5% drop since 2015. This can be explained by the recent redevelopment of some employment land (at least 19 businesses have been lost with the demolition of the Rich Estate only), residential conversion through permitted development (e.g. Chevron Apartments in St James Road), or the recent move of some businesses in anticipation of future redevelopments (Lambeth and Southwark Community Transport). In this context, the growth in terms of number of jobs can be explained by the fact that a number

of businesses have grown since 2015, taking on more staff. This includes Constantine, Gadmon Industries, TNT, Leathams, Souvenir Studios, Diespeker and Co., among others.

The local economy has evolved, but its composition has not radically shifted since 2015. The retail trade, services and logistic sectors are still dominating the employment landscape. However, significant employment growth has been recorded in the creative industry and manufacture sectors. Overall, identified changes have mainly impacted the following sectors:

Net loss (both in terms of sectors & employment)

- Vehicles sale & repair
- Printing & publishing
- Transport & storage
- Professional services
- Faith

Net gain (both in terms of sectors & employment):

- Manufacture food & drink
- Manufacture: metal/machinery
- Manufacture: other
- Art, culture, leisure & sports
- Restaurant & cafes

Some intra-sector changes have also been identified. For example, the Transport and Storage sector was typically made of businesses working in the transportation of goods and persons in 2015, and has progressively shifted towards distribution and shipping activities. Also, specialist art storage and transport companies have established themselves in the area (Constantine, Tate, Timothy Taylor Gallery, Jawhak) and in some cases grown.

New businesses have also been able to establish themselves in the area. Particularly of interest, in the context of declining manufacturing in London, are the 23 manufacturing businesses newly identified in 2019. These include manufacturers of handmade metal trays and hotplates (Kaymet), creative manufacturing utilising new technologies such as laser cutting (Lasercut Works) and small scale beverage manufacturers that are seeing the rapid growth in their business (Small Beer Brewery).

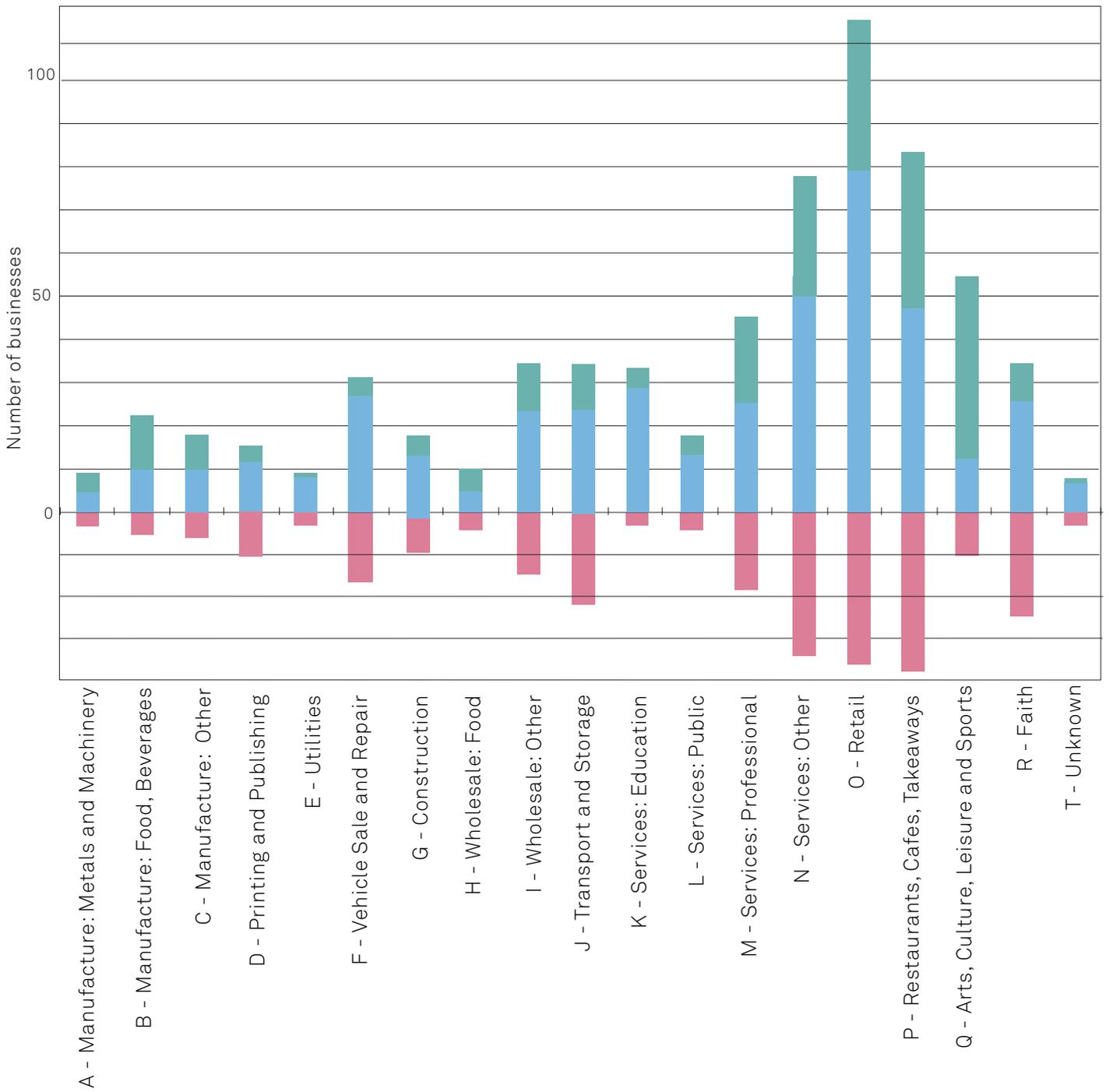


Figure 7 Business loss & gain 2015-2019

■ Remained
 ■ New
 ■ Lost

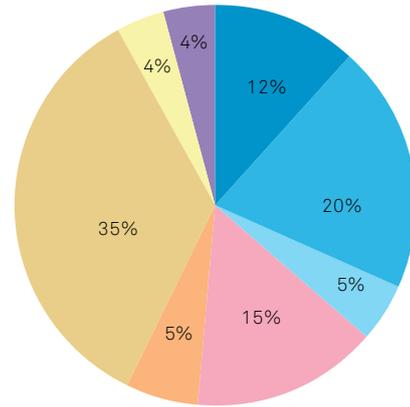
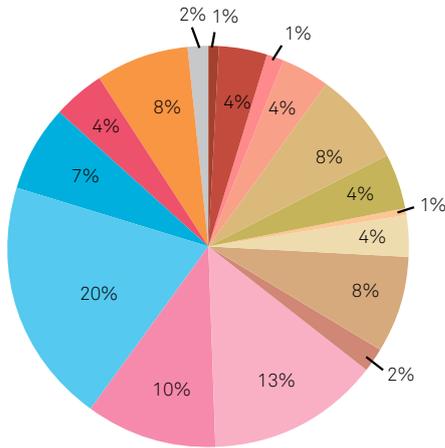


Figure 8.1 Business loss (since 2015) by sector

Figure 8.2 Business loss (since 2015) by building type

KEY

Business sector

 Manufacture: Metals/Machinery	 Vehicle Sale and Repair	 Services: Education	 Arts, Culture, Leisure and Sports
 Manufacture: Food related	 Construction	 Services: Public	 Faith
 Manufacture: Other	 Wholesale: Food	 Services: Professional	 Unknown
 Printing and Publishing	 Wholesale: Other	 Services: Other	 Vacant
 Utilities	 Transport and Storage	 Retail	 Building site
		 Restaurant, Cafes, Takeaways	

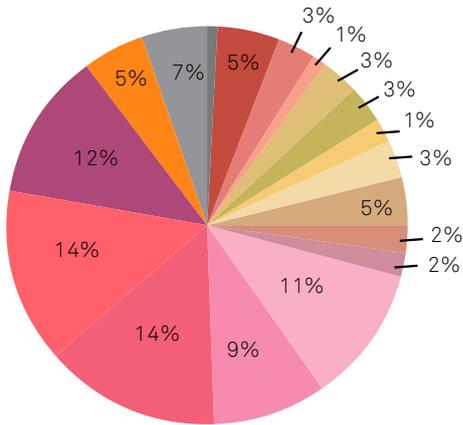


Figure 9.1 New businesses (post 2015) by sector

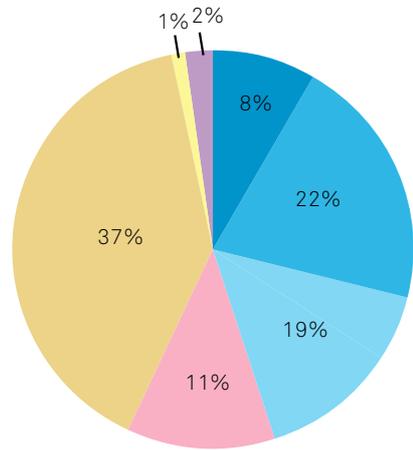


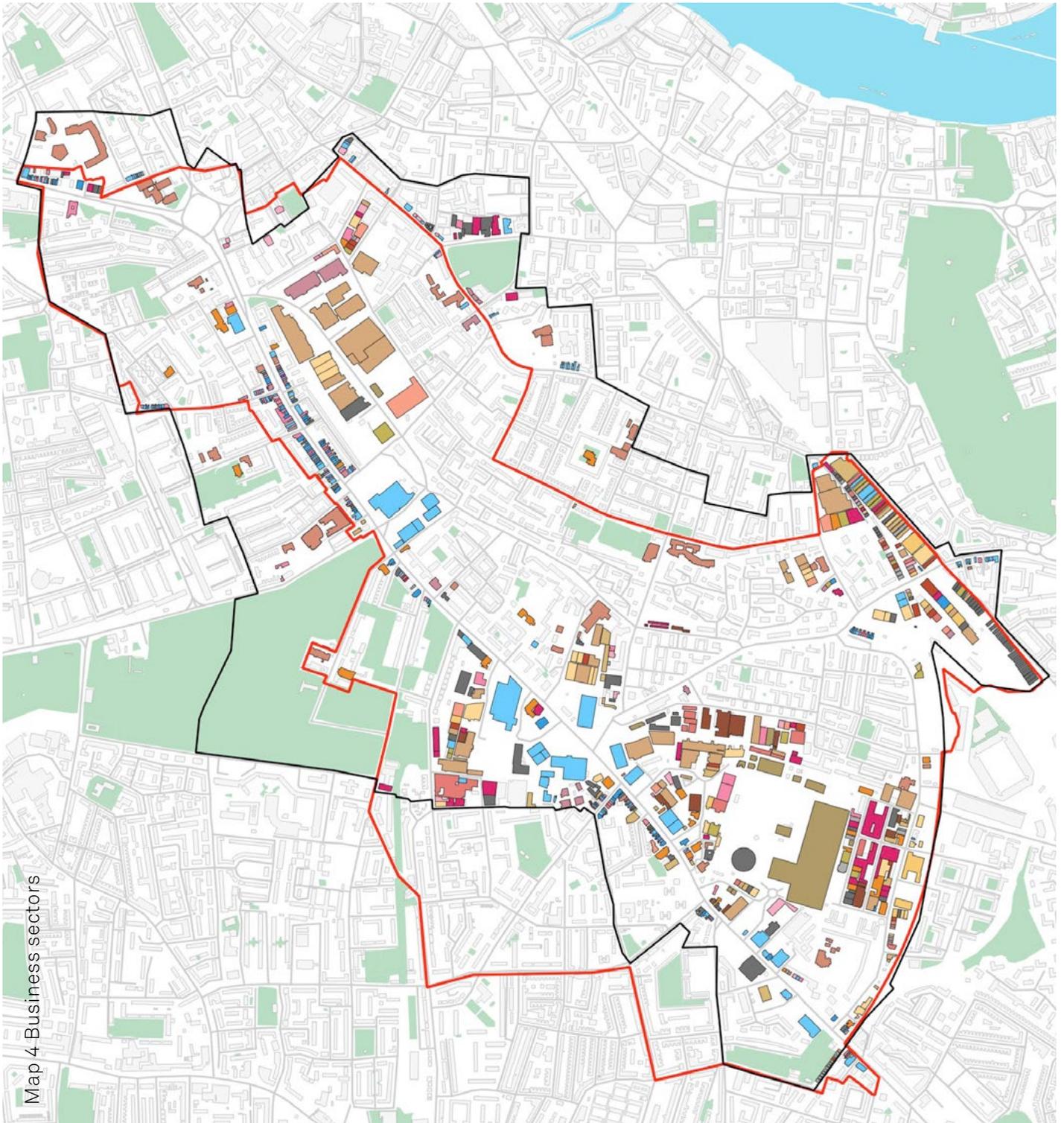
Figure 9.2 New businesses (post 2015) by building type

KEY

Building types

- Pre-1945 factory, depot, or warehouse
- Railway arch
- Retail park with associated car park
- Post-1945 industrial building
- Office building
- School Building
- Purpose-built industrial shed
- Small retail space
- Other

OVERVIEW:
BUSINESS
SECTORS



KEY

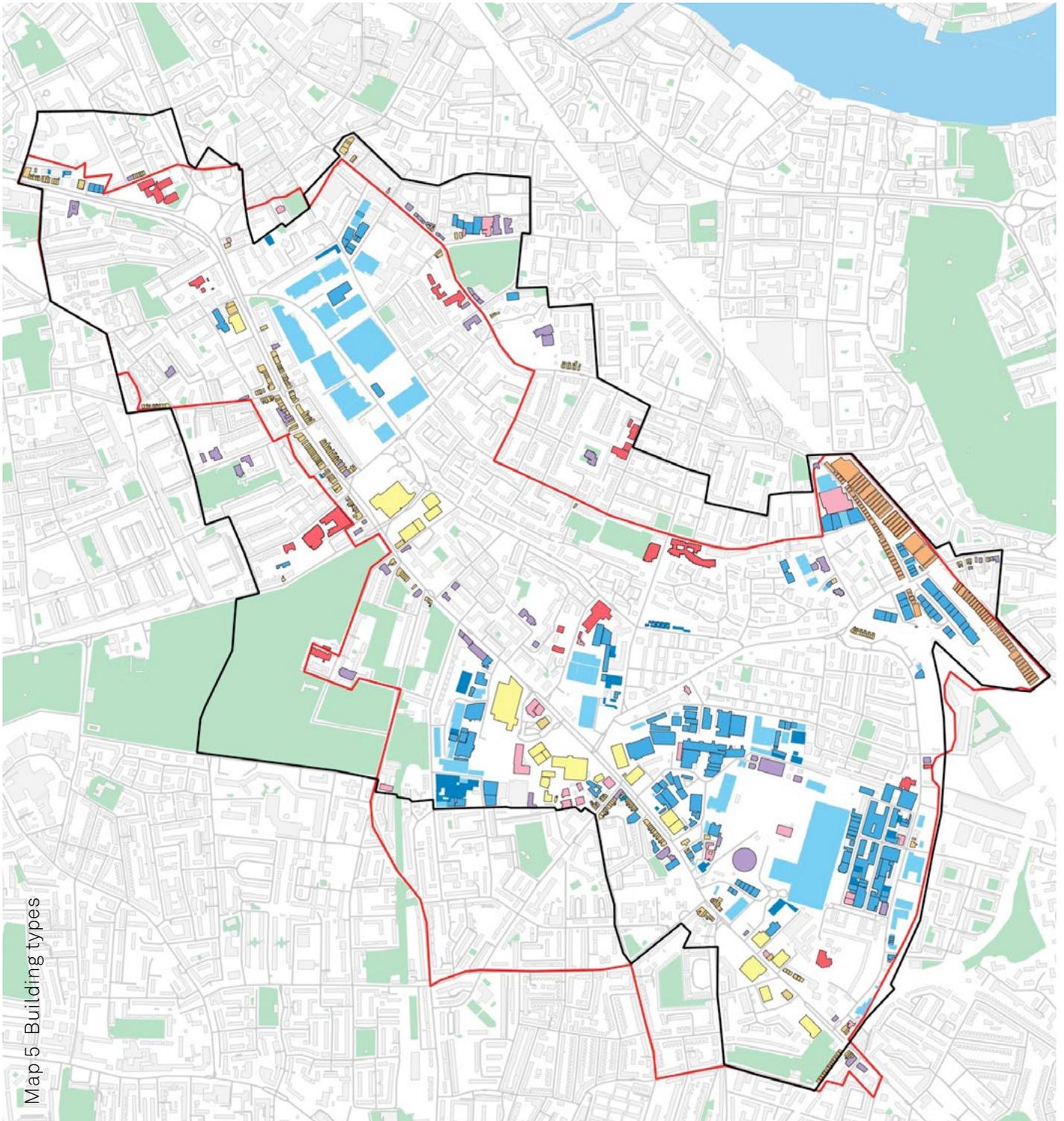
Business sector

 Manufacture: Metals/Machinery	 Vehicle Sale and Repair	 Services: Education	 Arts, Culture, Leisure and Sports
 Manufacture: Food related	 Construction	 Services: Public	 Faith
 Manufacture: Other	 Wholesale: Food	 Services: Professional	 Unknown
 Printing and Publishing	 Wholesale: Other	 Services: Other	 Vacant
 Utilities	 Transport and Storage	 Retail	 Building site
		 Restaurant, Cafes, Takeaways	

 Study area boundary

 Area Action Plan (AAP) boundary

OVERVIEW: BUILDING TYPES



Map 5 Building types

KEY

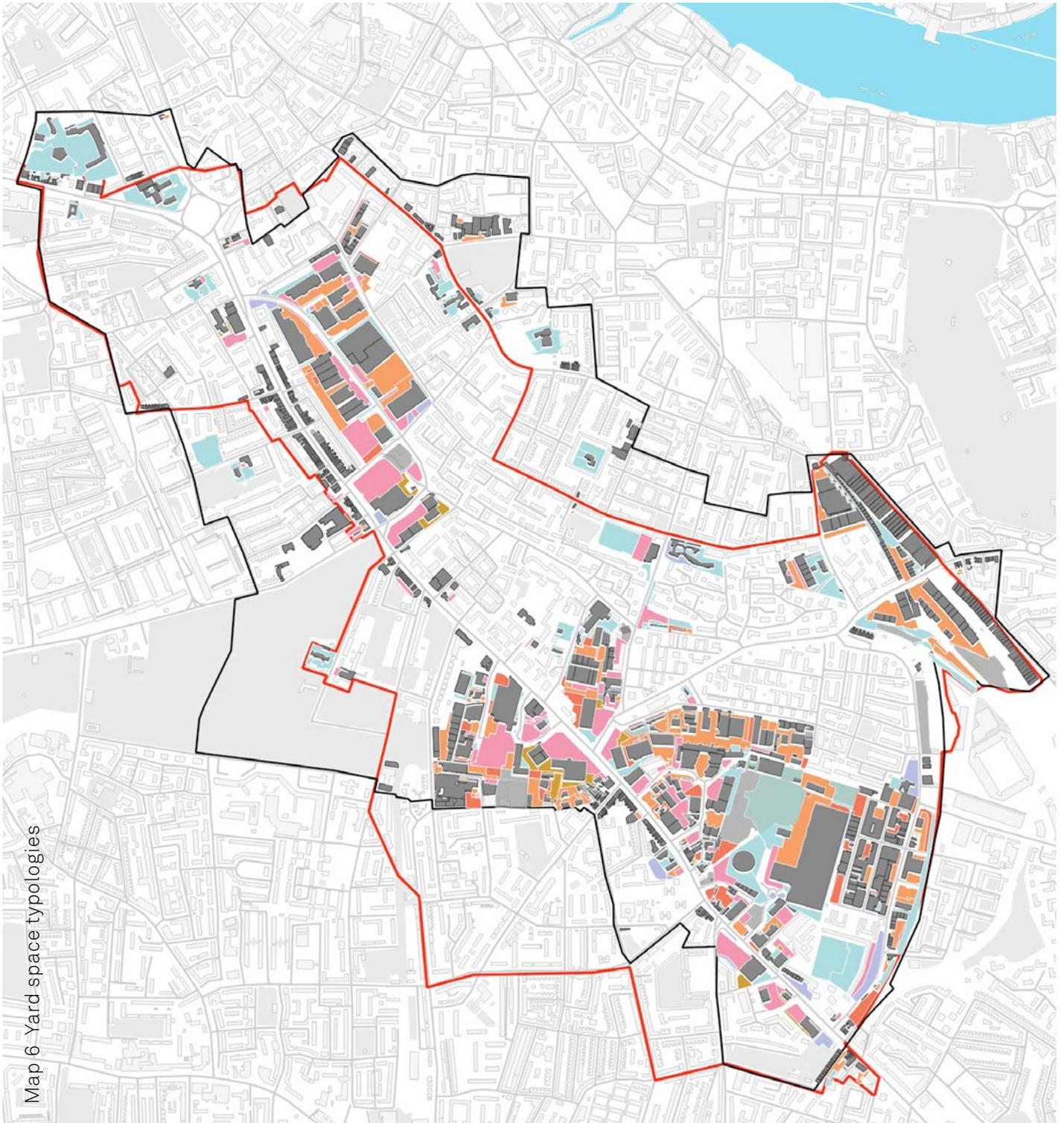
Building types

	Pre-1945 factory, depot, or warehouse		Railway arch		Retail park with associated car park
	Post-1945 industrial building		Office building		School Building
	Purpose-built industrial shed		Small retail space		Other

 Study area boundary

 Area Action Plan (AAP) boundary

OVERVIEW:
YARD SPACE
TYPOLOGIES



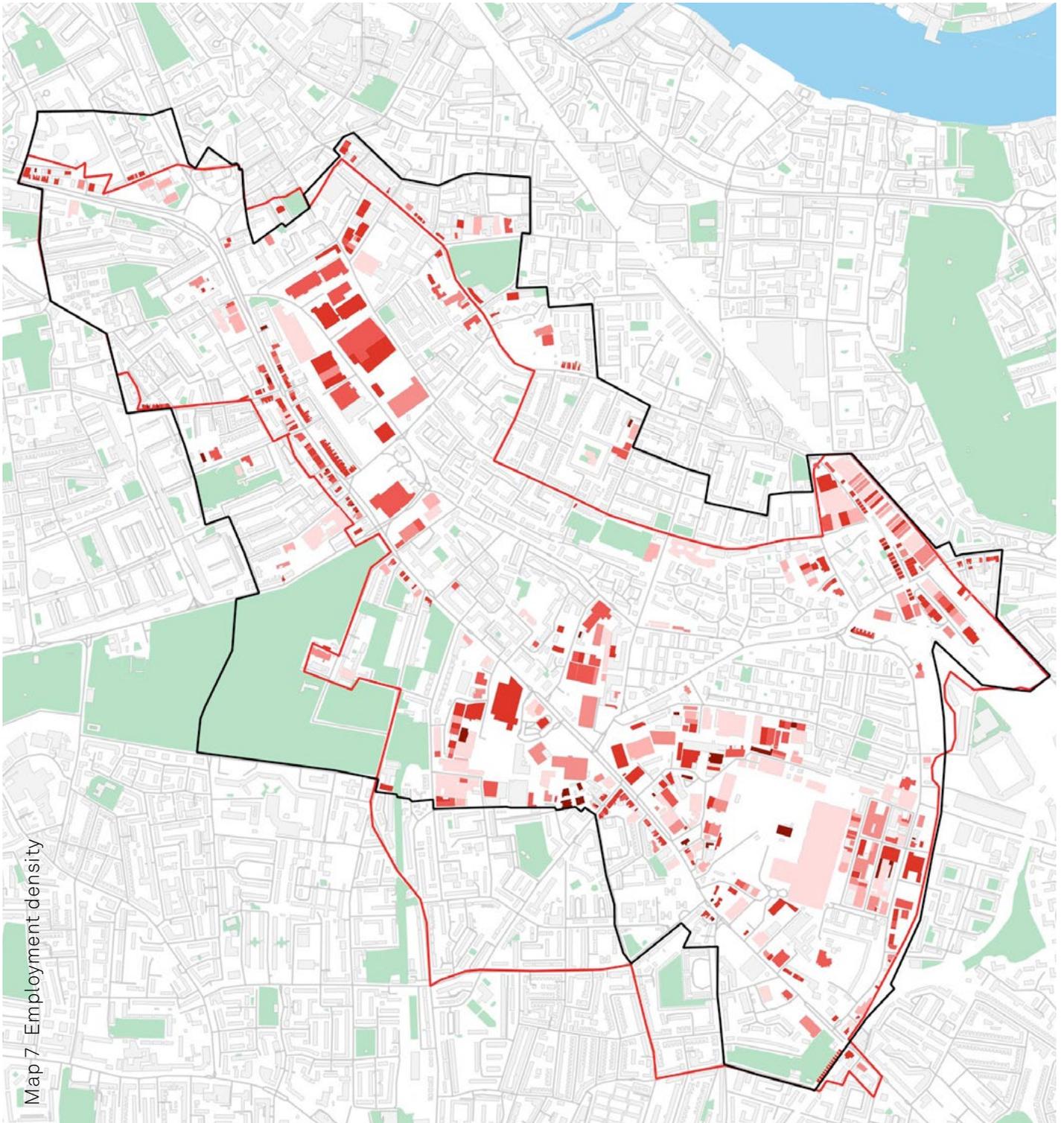
Map 6 Yard space typologies

KEY

Yard space typologies

-  Car parking
-  Operational yard space: storage
-  Operational yard space: servicing (industrial)
-  Operational yard space: servicing (retail)
-  Public open space
-  Private open space / deadspace
-  Utilities
-  Vacant yardspace
-  Identified employment buildings
-  Study area boundary
-  Area Action Plan (AAP) boundary

OVERVIEW:
EMPLOYMENT
DENSITY



KEY

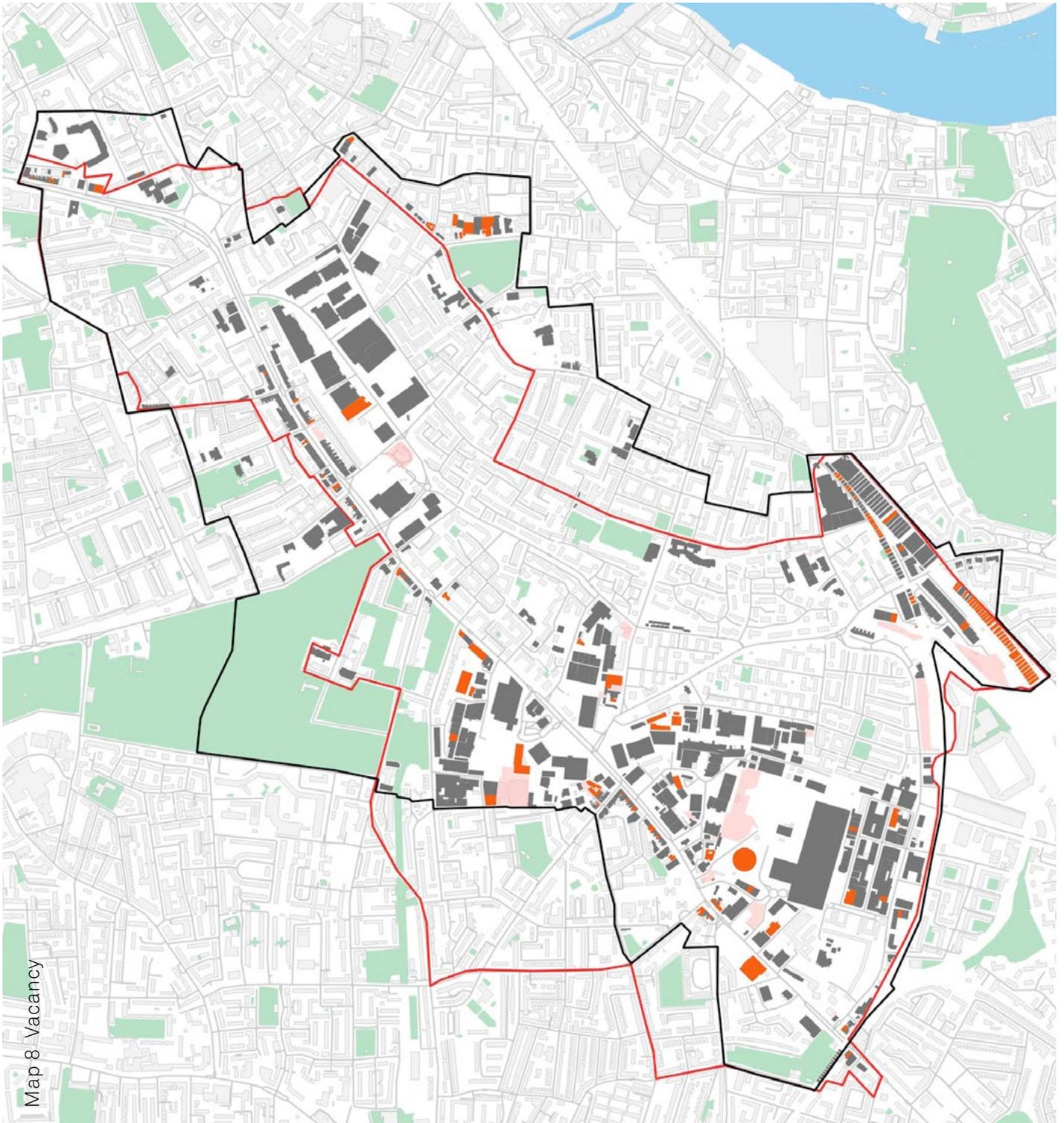
Employment density



 Study area boundary

 Area Action Plan (AAP) boundary

OVERVIEW:
VACANCY



KEY

Vacancy

-  Vacant building
-  Vacant yard space
-  Identified employment buildings

-  Study area boundary
-  Area Action Plan (AAP) boundary

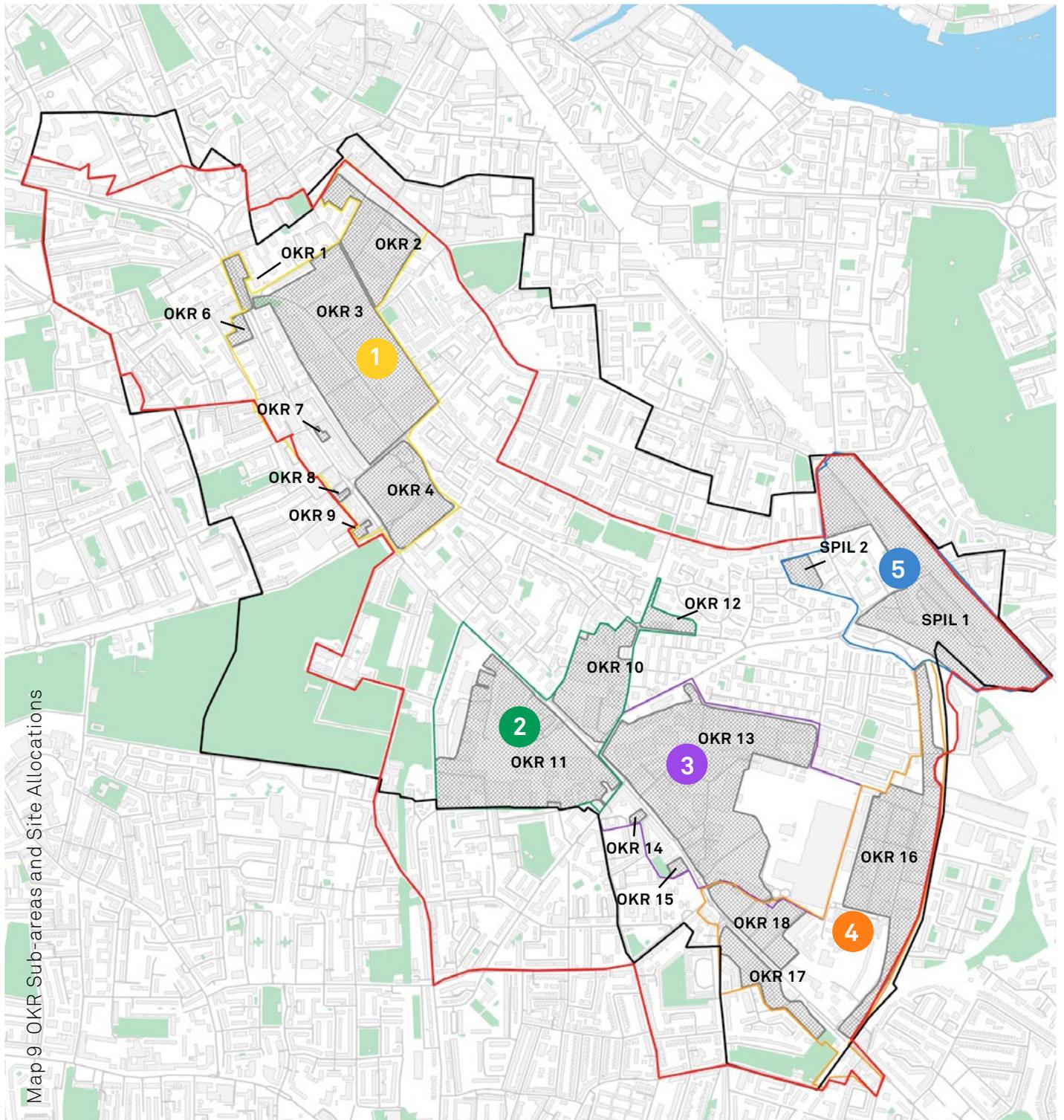
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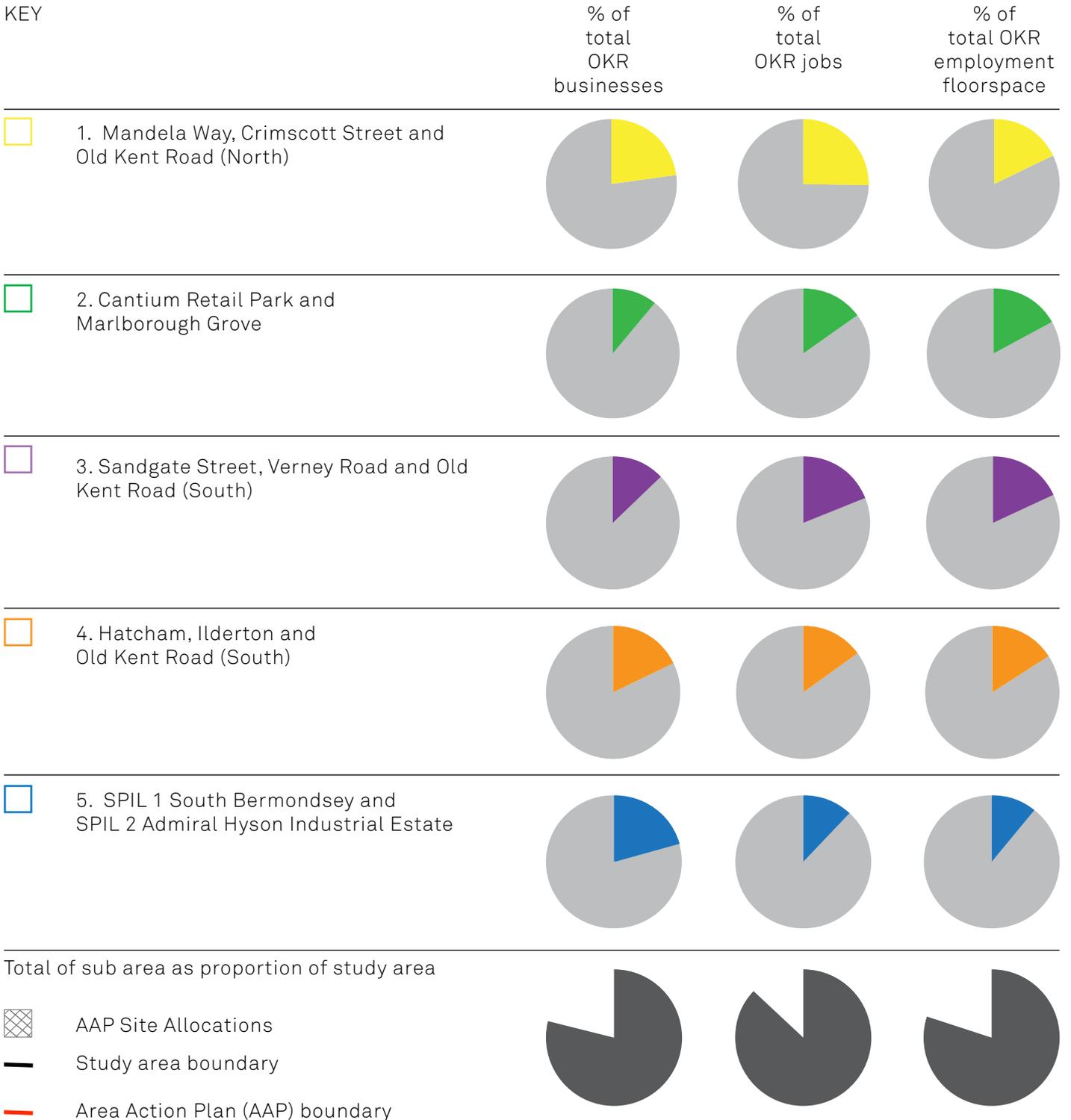
SUB-AREAS ANALYSIS





2.2 SUB-AREAS ANALYSIS





2.3

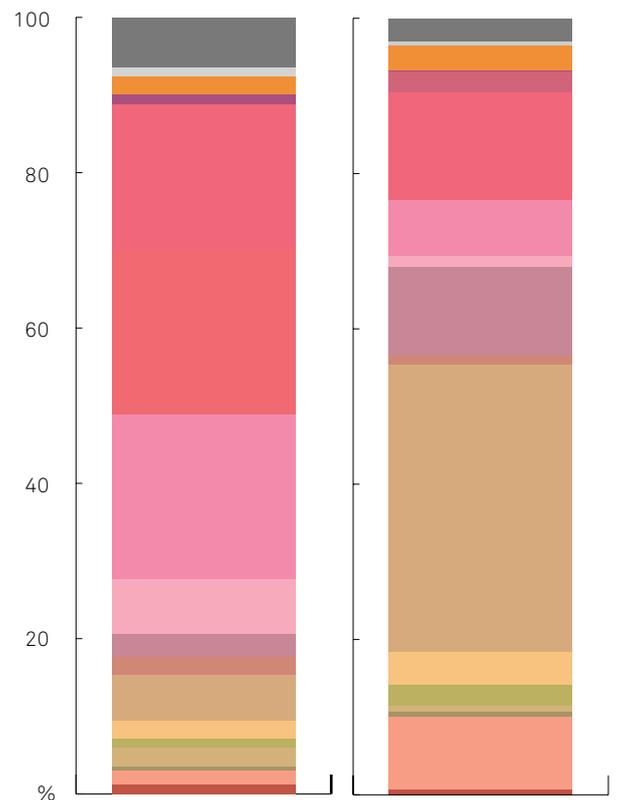
MANDELA WAY, CRIMSCOTT AND OLD KENT ROAD (NORTH)

162 businesses

2,641 employees

**112,410 sqm
of employment floorspace**

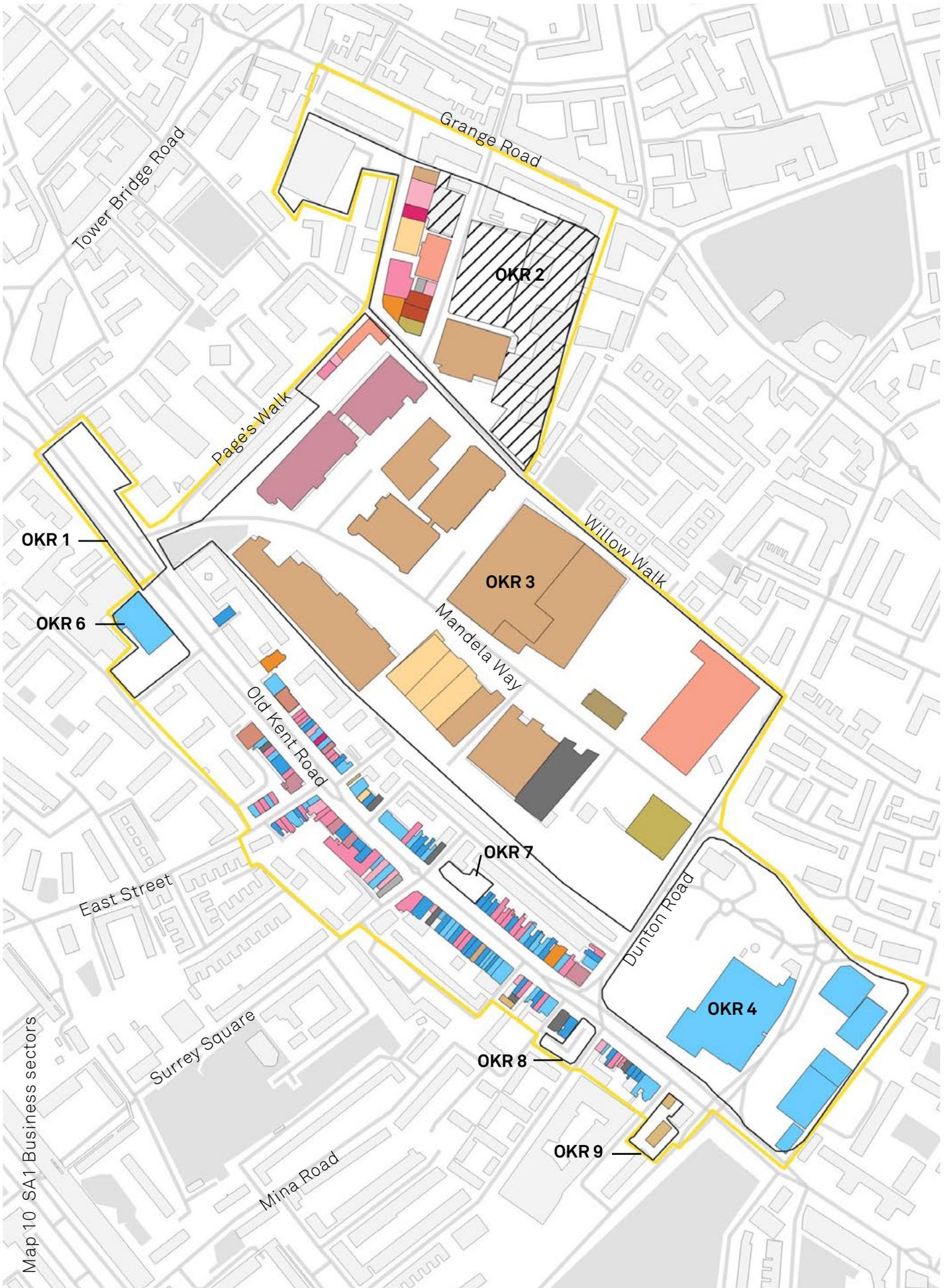
**37,931 sqm
of operational yardspace**



KEY

Business sector

 Manufacture: Metals/Machinery	 Vehicle Sale and Repair	 Services: Education	 Arts, Culture, Leisure and Sports
 Manufacture: Food related	 Construction	 Services: Public	 Faith
 Manufacture: Other	 Wholesale: Food	 Services: Professional	 Unknown
 Printing and Publishing	 Wholesale: Other	 Services: Other	 Vacant
 Utilities	 Transport and Storage	 Retail	 Building site
		 Restaurant, Cafes, Takeaways	



Map 10 SA1 Business sectors

The Mandela Way, Crimscott & Old Kent Road (North) sub-area hosts the highest concentration of employment in the Old Kent Road study area (26%). The sub-area shows a high degree of diversity of uses and includes high-street type retail spaces and activities as well as large retail park and industrial buildings of diverse size.

Business activity

The 162 businesses identified make up 26% of all businesses resident in the Old Kent Road area. This is primarily made up of retail businesses along Old Kent Road and large distribution and storage businesses around Mandela Way industrial estate. To the north, businesses clustered around Page’s Walk and Crimscott Street are more diverse in nature, including businesses in the printing and publishing sector, manufacture of food and beverage; professional services and wholesale.

Excluding retail, about one in five businesses are in the distribution and storage sector, which is also the top employment sector in the Old Kent Road area, and represents 45% of the sub-area employment. This covers all aspects of logistics activities including courier services and shipping. It houses a branch of DPD Interlink, Transworld, TNT and Royal Mail, nation-wide UK and International courier service businesses. The retail and services sectors, although less prevalent in terms of total share of businesses account for 17% and 10% respectively of the sub-area employment. Large retail employers are found in Southernwood Retail Park while the high street is typically home to smaller retail businesses. In comparison with the rest of the Old Kent Road area, the vacancy within retail units is relatively low.

Workspace

Around Page’s Walk, the physical make-up of the area is characterized by a high proportion of older industrial stock mostly under the form of traditional post-war industrial sheds, the larger sized units are broken down into multiple smaller units occupied by different businesses; on the overall

site, the average unit size is slightly below 400sqm. In Mandela Industrial Estate, the stock is made up of a mixture of good quality provision ranging from the 1970/1980s to contemporary standalone sheds with associated yard space (used both for storage and servicing). This accounts for the overall good condition of the building stock. Individual businesses are often occupying the entirety of the premises. Employment spaces along the high street are characterised by small retail units that are often broken down into two smaller units occupied by different businesses.

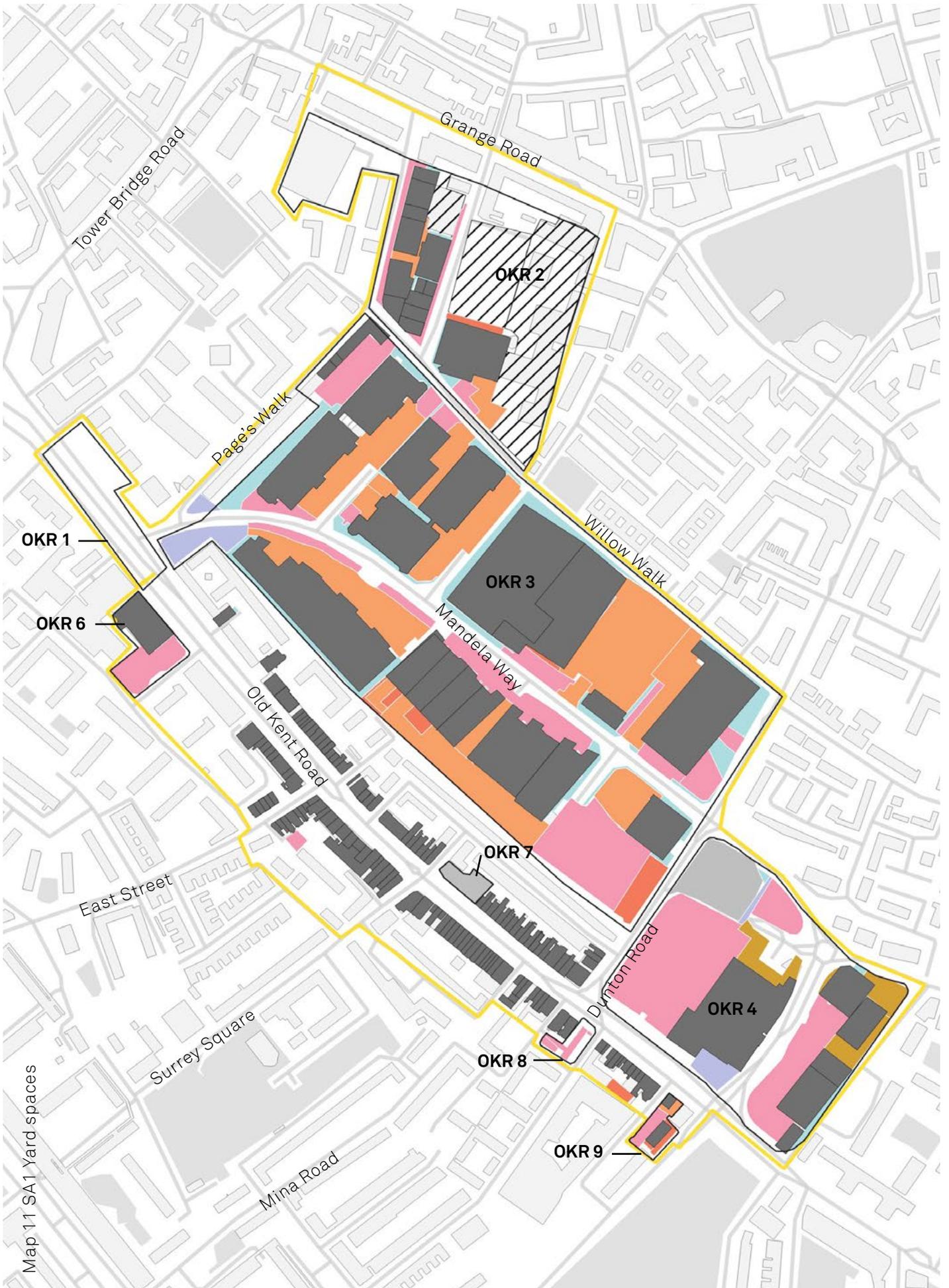
Storage and distribution-related businesses are the most dominant in terms of premises size and space hungry operations. Including operational yard spaces, the sector occupies more than 50% of the sub-area employment floorspace,

Employment

Despite the recent demolition of the Rich Industrial Estate in the context of the redevelopment of the area, the sub-area still hosts the highest concentration of employment in the Old Kent Road study area (26%) with 2,641 jobs. It is also host to the greatest diversity of uses and building stock. Along Old Kent Road, the average number of employee per business is 3,7 which is considered to be average for London’s high street retail businesses. High employment density levels in the

KEY

-  Car parking
-  Operational yard space: storage
-  Operational yard space: servicing (industrial)
-  Operational yard space: servicing (retail)
-  Public open space
-  Private open space / deadspace
-  Vacant
-  Building site



Mandela Way Industrial Estate are achieved through single businesses occupying large scale premises simultaneously employing sizable workforce.

Identified recent changes

With the demolition of the Rich Industrial Estate in 2017 in the context of the redevelopment of the site, it is estimated that 19 businesses and organisations have been lost since the 2015 survey, representing approximately 215 jobs. The creative industry sector has been particularly affected with the loss of the Bermondsey Project (Bow Arts) which offered artist studios and workspace for around 120 creative professionals as well as exhibition spaces. However, two of the artist's workspace providers will return once site upon redevelopment. Other sectors affected by the redevelopment of the site includes food and drink manufacturing, printing and digital services as well construction services.

Looking at the rest of the area, the number of businesses has remained similar. Changes along Old Kent Road seem to be relatively significant as 30% of the businesses have moved to the area since 2015.

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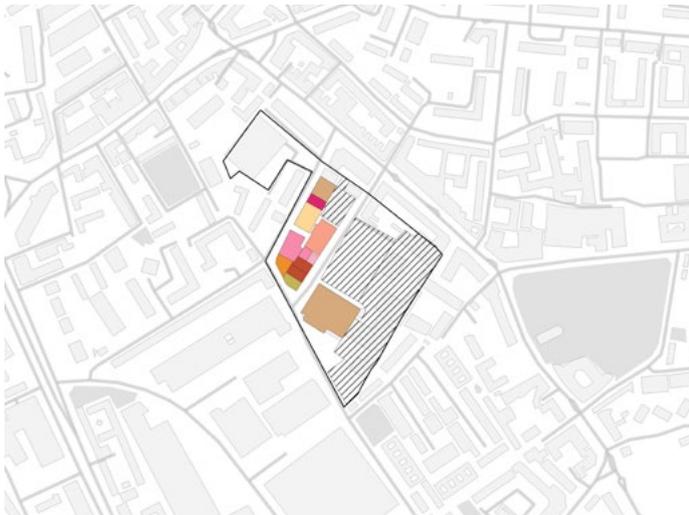
SITE ALLOCATION

OKR 2

3.8 ha

16 businesses

170 jobs



With the recent demolition of the Rich Industrial Estate, the Site Allocation OKR 2 has seen its number of businesses drop from 32 to 16. This included Bow Arts and Tannery Arts studios that provided workspaces for an estimated number of 150 artists and creative professional but also businesses within the distribution, wholesale and manufacturing sectors. In total, it is estimated that 26 500sqm of employment floorspace and more than 300 jobs have been lost since the 2015 audit. The redevelopment of the site will however reprovide 19,468sqm of employment floorspace, including 3,100sqm of industrial floorspace (B8). Two of the artists studio providers (Tannery Arts and Southwark Studios) will be returning on site upon redevelopment.

Floorspace capacity

Employment floorspace :	6,712 sqm
Retail floorspace:	0 sqm
Leisure, faith, education & health:	315 sqm

Total employment space: 7,027 sqm*

* Excluding the Rich Estate, currently in redevelopment

KEY

 Manufacture: Food related	 Services: Professional
 Manufacture: Other	 Services: Other
 Printing and Publishing	 Arts, Culture, Leisure and Sports
 Construction	 Faith
 Wholesale: Other	 Unknown
 Transport and Storage	 Building site

The remaining businesses are clustered along Page's Walk and Crimscott Street and hosted within purpose-built industrial warehouse. Apart from the affordable workspace provider Artistic Space who is newly arrived taking on two units on Page's Walk, most of the businesses were already on site in 2015. Their activities are varied, with light industrial and more office-based businesses working in the distribution, wholesale, printing and manufacturing sector with good representation of food-related activities (brewing, catering, manufacturing).

A planning application was granted for the redevelopment of the Rich Estate in 2015 (15/AP/2474). At the time of submission the site included 29,309sqm of floorspace including office (B1), storage (B8), artists studios/flexible space/gallery (B1/D1/A1), flexible retail/café/restaurant uses and vacant buildings. As the scheme has been implemented with some buildings demolished the business floorspace was not surveyed. 61 Willow Walk is within the third phase of the development and is currently in use as a self store, which has been surveyed but not included in the total figure for OKR2 as the floorspace is included in the overall figures for the Rich Estate planning application at the time of submission in 2015.



Yard space capacity

Car Parking:	1,612 sqm
Yard space (storage):	309 sqm
Yard space (industrial servicing):	1,381 sqm
Yard space (retail servicing):	-
Public open space:	-
Private open space:	560 sqm

Total yard space:	3,862 sqm*
Total operational yard space:	1,689 sqm*

* Excluding the Rich Estate, currently in redevelopment

KEY

- Car parking
- Operational yard space: storage
- Operational yard space: servicing
- Public open space
- Private open space / deadspace
- Building site

SITE ALLOCATION

OKR 3

12.57 ha

16 businesses

1,710 jobs



The Site Allocation OKR 3 is large and clearly has critical mass. Generating almost 20% of the employment in the Old Kent Road study area, it contains a mix of large occupiers, including public sector occupiers such as London Transport, Met Police and Royal Mail. The employment spaces are mainly B8 'industrial' shed and host mainly service-based industrial activities, including medical equipment, printing, construction supplies, distribution and shipping as well as storage. Such activities demonstrate the important role of the area providing support services to the central London economy. To the north of the Site Allocation, the former Bricklayers Arms railway station at The Willows is home to less industrial activities such as IT equipment repair, architecture and publishing. The latter sector, along with the distribution sector are particularly well represented in the area.

Floorspace capacity

Employment floorspace (B use):	7,4355 sqm
<i>incl. vacant</i>	<i>1,641 sqm</i>
Retail floorspace (A use):	-
Community floorspace (D use):	-
Other (sui generis use):	-
Total employment space:	74,355 sqm
<i>incl. vacant</i>	<i>1,641 sqm</i>

The occupation of the area has not substantially changed recently and most of the businesses reported in the 2015 audit remained on site. Newly installed businesses include the delivery service company Yodel, taking up two units within the Bricklayers Arms Estate. Yodel was previously located in Kent Park Industrial Estate and has reported moving in to Mandela Way due to the growth of the company and the need for a biggest premises.

KEY

 Manufacture: Other	 Services: Other
 Printing and Publishing	 Services: Professional
 Construction	 Services: Public
 Utilities	 Arts, Culture, Leisure and Sports
 Wholesale: Other	 Vacant
 Transport and Storage	



Yard space capacity

Car Parking:	16,008 sqm
Yard space (storage):	1942 sqm
Yard space (industrial servicing):	30,044 sqm
Yard space (retail servicing):	-
Public open space:	2,969sqm
Private open space:	7,935 sqm

Total yard space:	58,899 sqm
Total operational yard space:	31,987 sqm

KEY

- Car parking
- Operational yard space: storage
- Operational yard space:servicing
- Public open space
- Private open space / deadspace

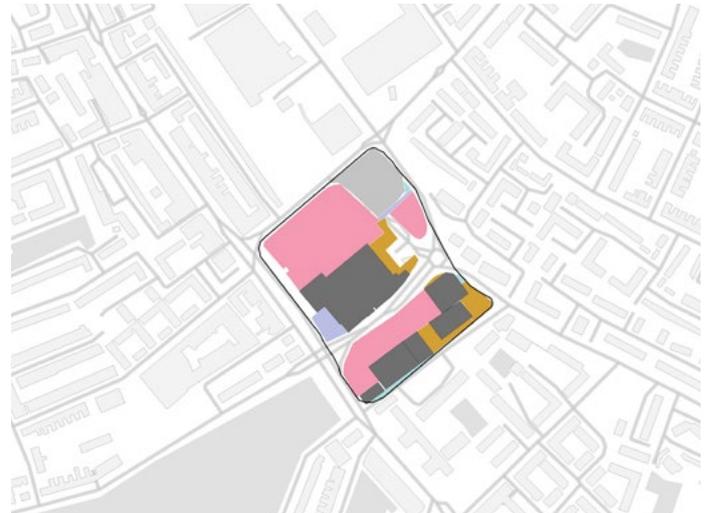
SITE ALLOCATION

OKR 4

3.99 ha

6 businesses

179 jobs



Floorspace capacity

Employment floorspace :	10,812 sqm
Retail floorspace:	-
Leisure, faith, education & health:	-

Total employment space: 10,812 sqm

The Site Allocation 4 covers the Southernwood Retail Park which is exclusively composed of large scale retailers. The retail branch of Tesco's alone accounts for 128 jobs. Spatially, these retail activities are associated with large-scale shared parking spaces for both staffs and customers. As such, although employment density of individual units can be high (especially for the Tesco site), the density of the overall retail site drops significantly when accounting for ancillary servicing and parking.

KEY

■ Retail

Yard space capacity

Car Parking:	13,976 sqm
Yard space (storage):	-
Yard space (industrial servicing):	-
Yard space (retail servicing):	3,382sqm
Public open space:	1,033 sqm
Private open space:	639 sqm
Vacant	3,423 sqm

Total yard space: 22,452 sqm
Total operational yard space: 3,382 sqm

KEY

- Car parking
- Operational yard space: servicing (retail)
- Public open space
- Private open space / deadspace
- Vacant

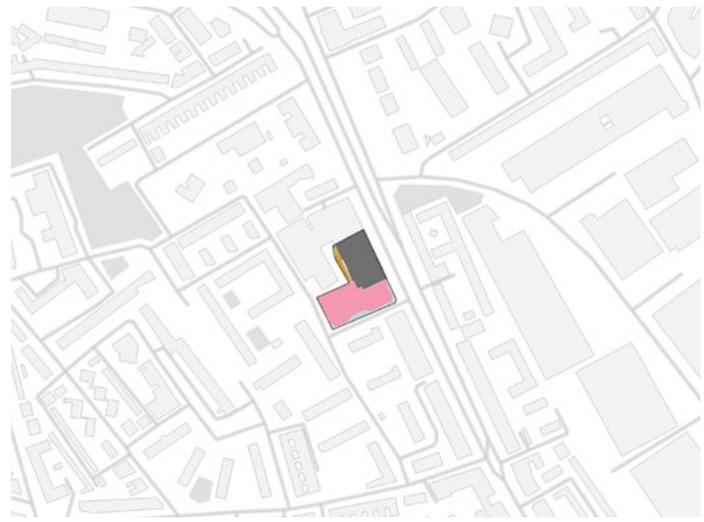
SITE ALLOCATION

OKR 6

0.8 ha

1 business

12 jobs



Floorspace capacity

Employment floorspace :	-
Retail floorspace:	1,392 sqm
Leisure, faith, education & health:	-

Total employment space: 1,392 sqm

Located along Old Kent Road to the south of Bricklayers Arms roundabout, the Site Allocation OKR 6 encompasses the discount supermarket chain Lidl and associated customer car park.

KEY

■ Retail

Yard space capacity

Car Parking:	1,640 sqm
Yard space (storage):	-
Yard space (industrial servicing):	-
Yard space (retail servicing):	126 sqm
Public open space:	-
Private open space:	186 sqm
Vacant	

Total yard space: 1,952 sqm
Total operational yard space: 126 sqm

KEY

■ Car parking

■ Operational yard space: servicing (retail)

■ Private open space / deadspace

SITE ALLOCATION

OKR 7

0.08 ha

0 business

0 job



Floorspace capacity

Employment floorspace :	-
Retail floorspace:	-
Leisure, faith, education & health:	-

Total employment space: -

Yard space capacity

Car Parking:	-
Yard space (storage):	-
Yard space (industrial servicing):	-
Yard space (retail servicing):	-
Public open space:	-
Private open space:	-
Vacant	797 sqm

Total yard space: 797 sqm

Total operational yard space: -

The Site Allocation OKR 7 is a vacant site, formerly occupied by a hand car wash business. Part of the site is currently used to store materials, .

KEY

 Vacant

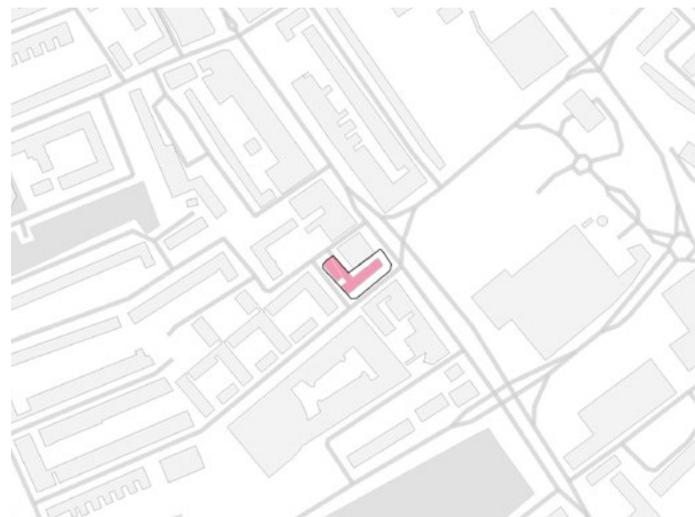
SITE ALLOCATION

OKR 8

0.09 ha

0 businesses

0 jobs



Floorspace capacity

Employment floorspace :	-
Retail floorspace:	-
Leisure, faith, education & health:	-
Total employment space:	-

The Kinglate Street garage site (Site Allocation OKR 8) has been vacant for more than 10 years and is currently used as a car park.

Yard space capacity

Car Parking:	425 sqm
Yard space (storage):	-
Yard space (industrial servicing):	-
Yard space (retail servicing):	-
Public open space:	-
Private open space:	-
Vacant	-
Total yard space:	425 sqm
Total operational yard space:	-

KEY

Car parking

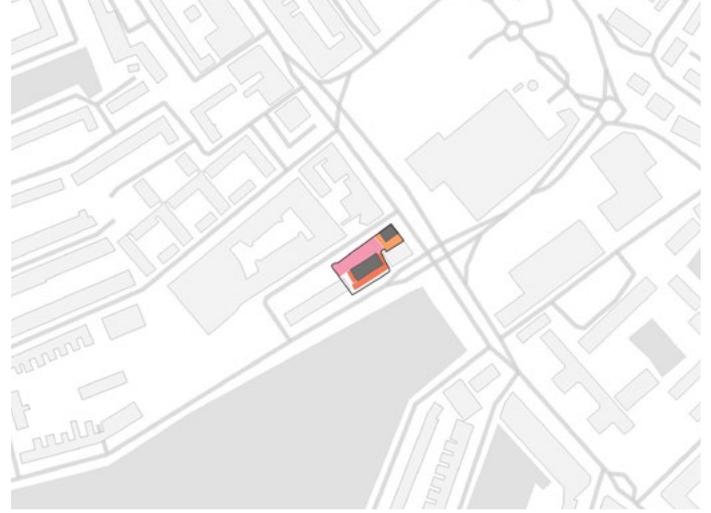
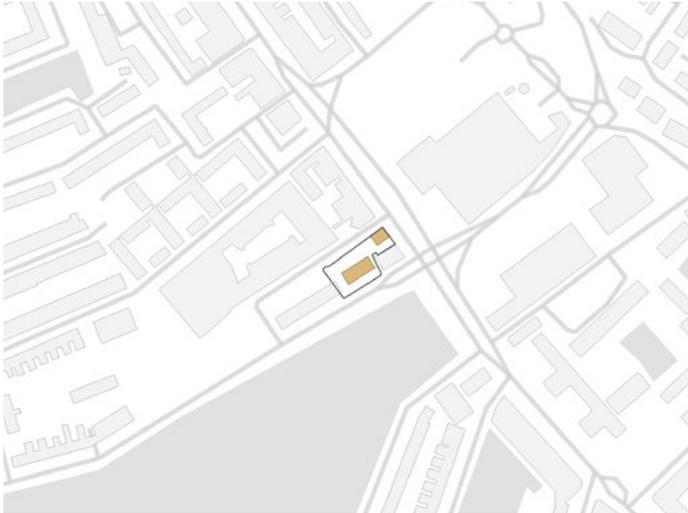
SITE ALLOCATION

OKR 9

0.13 ha

2 businesses

19 jobs



Floorspace capacity

Employment floorspace :	339 sqm
Retail floorspace:	-
Leisure, faith, education & health:	-

Total employment space: 339 sqm

The Site Allocation OKR 9 is currently occupied by vehicles related businesses including Madhouse Tyres and a hand car wash business. Yard spaces are used for both car park and storage.

KEY

■ Vehicle Sale and Repair

Yard space capacity

Car Parking:	430 sqm
Yard space (storage):	222 sqm
Yard space (industrial servicing):	142 sqm
Yard space (retail servicing):	-
Public open space:	-
Private open space:	-
Vacant	-

Total yard space: 794 sqm
Total operational yard space: 364 sqm

KEY

- Car parking
- Operational yard space: storage
- Operational yard space: servicing

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2.4

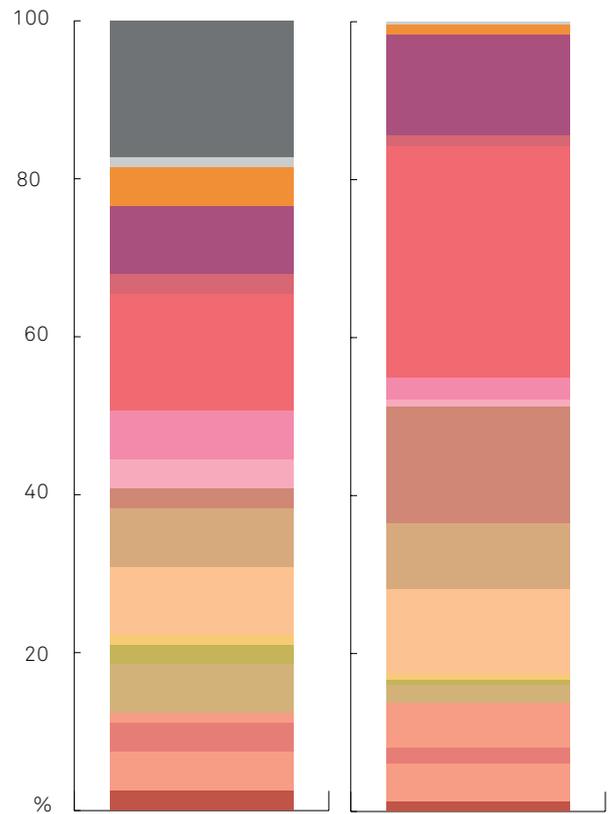
CANTIUM RETAIL PARK AND MARLBOROUGH GROVE

80 businesses

1,420 employees

**96,489 sqm
of employment floorspace**

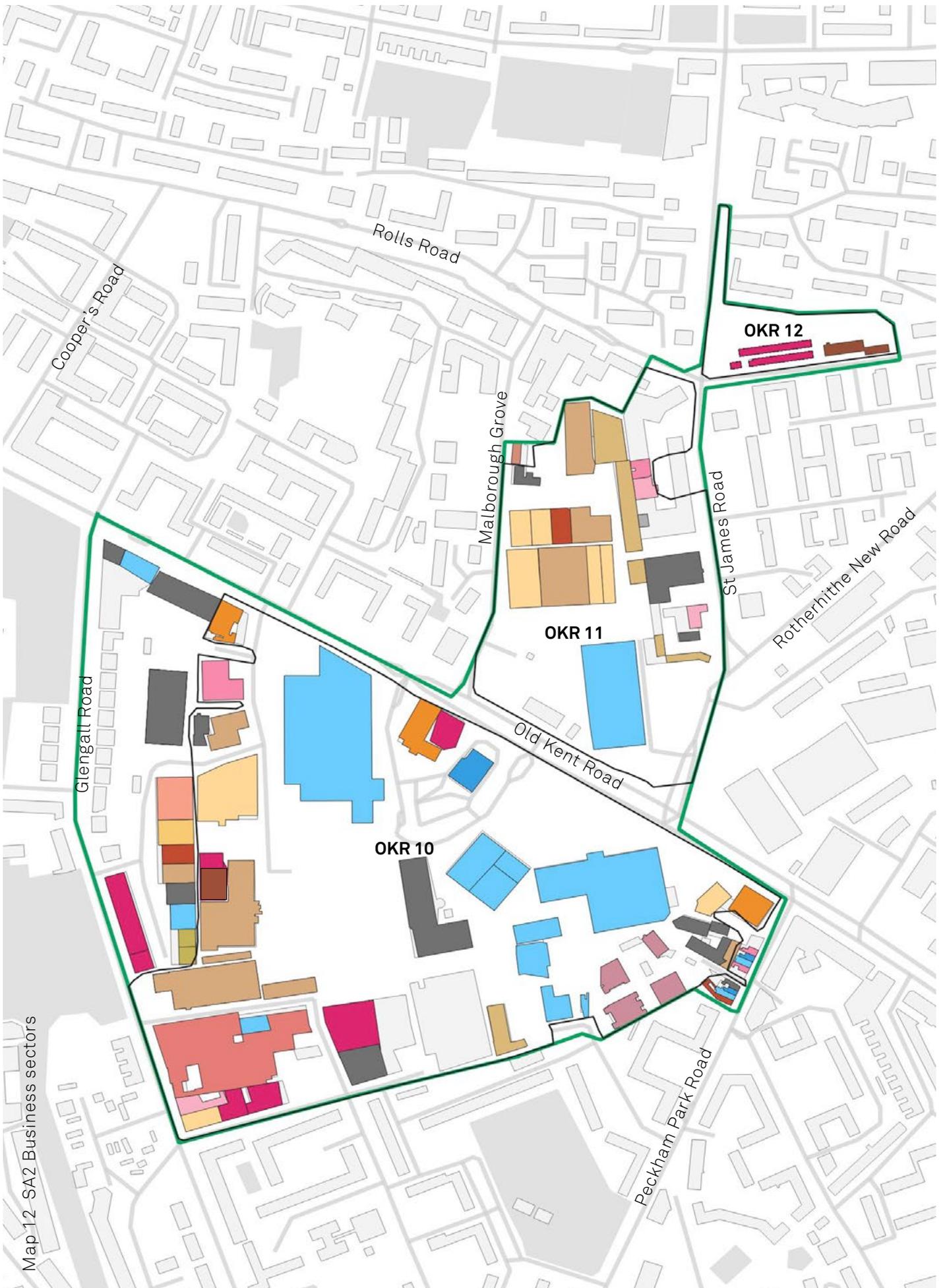
**33,217 sqm
of operational yardspace**



KEY

Business sector

	Manufacture: Metals/Machinery		Vehicle Sale and Repair		Services: Education		Arts, Culture, Leisure and Sports
	Manufacture: Food related		Construction		Services: Public		Faith
	Manufacture: Other		Wholesale: Food		Services: Professional		Unknown
	Printing and Publishing		Wholesale: Other		Services: Other		Vacant
	Utilities		Transport and Storage		Retail		Building site
					Restaurant, Cafes, Takeaways		



Map 12 - SA2 Business sectors

The Cantium Retail Park and Marlborough Grove sub-area is home to a wide mix of business sectors and employment spaces, making up 12% of OKR businesses and 14% of the jobs in the area. Most of the sub-area (excl. the retail park and high street employment space) is designated as Strategic Industrial Land in the Southwark local plan (2007) and have been proposed for release in the New Southwark Local Plan with the exception of Glengall Business Park (retained SIL) and area along Ossory Road (proposed LSIS).

Business activity

The sub-area has no particularly dominant sector in term of business number, however wholesale (particularly of construction materials), transport and manufacturing sectors are well represented, along with creative industries and trade sectors. There are also a couple of religious facilities within the sub-area, mainly hosted within old industrial stock. To the north of the sub-area, in addition to mainly B-class uses, some trade counters (plumbing, electricity, construction materials) corresponding to A-class use are present and clustered in the Six Bridges Trading Estate. Other sectors includes storage and professional services.

Along Old Kent Road, the retail trade is dominant with the presence of large chain stores in Cantium Retail Park. To the south, employment spaces are predominantly used for depot/transport services (Council depot, TRS) as well as construction and trade (Travis Perkins), and typically include large operational yards that are use both for storage and servicing. Businesses are varied in terms of size and customer base ranging from small local companies to large national companies. Towards Latona Road, the stock is occupied by a mix of storage, wholesale and creative activities with the presence of Artistic Spaces and Space Studios. Light industrial activities are found around Latona Road, Ossory Road and Glengall Business Centre, hosting small businesses from the manufacture, printing and tech sectors among others. Ossory Road is also home of large warehouse hosting storage and wholesale businesses.

Employment

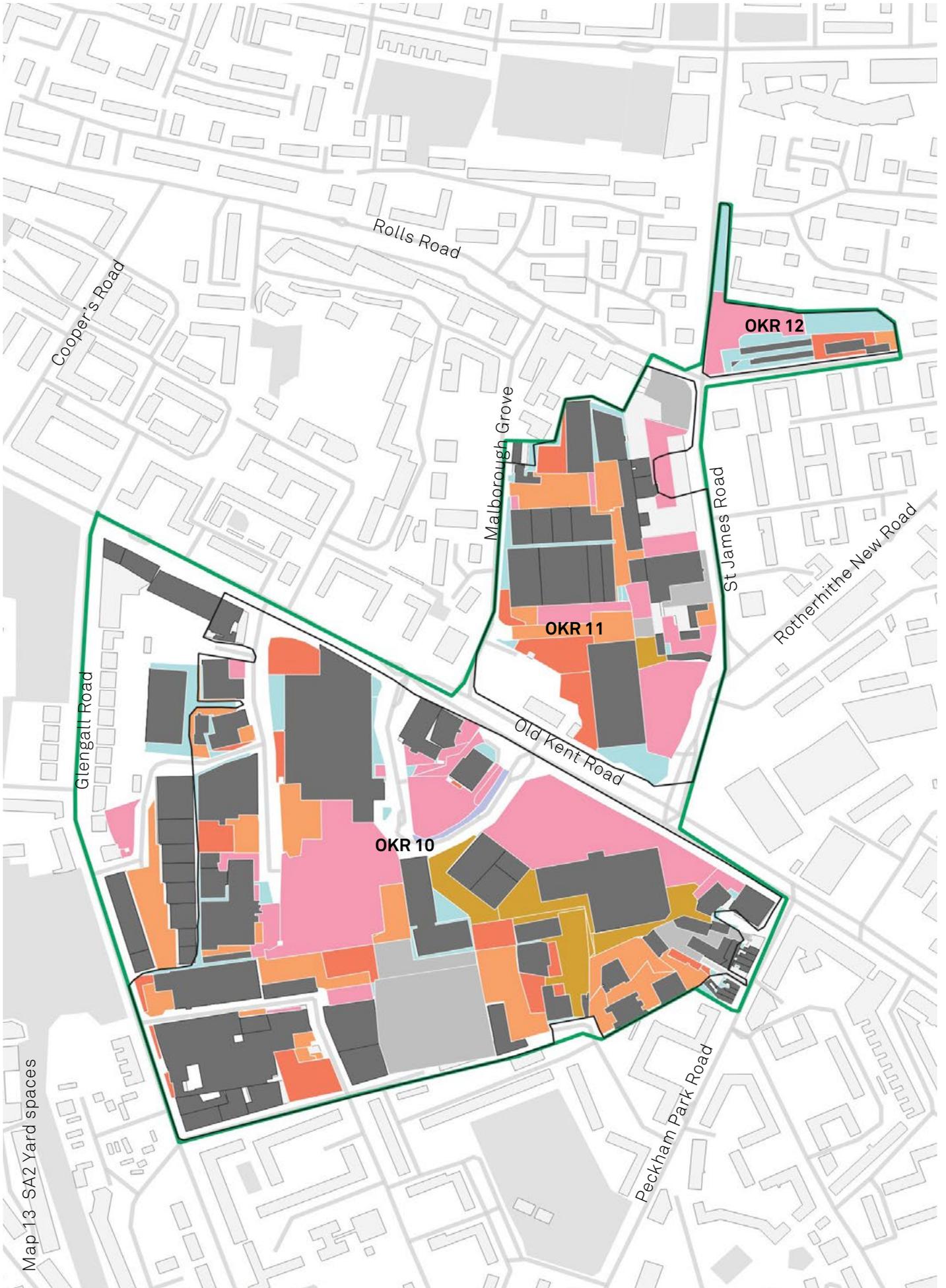
1420 individuals are estimated to be working across the sub-area, with the average business employing 21 people. Largest employers are from the utilities sector and includes Southwark Council Vehicle Maintenance (210), Asda (200) Screaming Colors (80), Rexel (75), Berkeley Catering and DX Courier (55). Creative workspace providers are also home to a number of artists and businesses: Space studios in Haymerle Road is providing workspaces for 95 creative individuals and Artistic Spaces in Latona Road for 15 people. Highest employment densities can be found within Space studios and the small units around Ossory Road and Glengall Business Centre. High employment density related to the industrial stock being shared amongst many businesses and their employees as well as the small average unit sizes of individual premises.

Workspace

The area's building stock is primarily industrial building ranging in age from the pre-1945 era to post-2000 construction. Large scale retail sheds and associated car park add to the diversity of stock on site and introduce non-industrial uses on site. Shared office buildings are spatially insignificant in terms of employment floorspace and are for most of them vacant. There is a relatively important number of large vacant premises, notably due to the recent move of the meat manufacturing company

KEY

-  Car parking
-  Operational yard space: storage
-  Operational yard space: servicing (industrial)
-  Operational yard space: servicing (retail)
-  Public open space
-  Private open space / deadspace
-  Vacant
-  Building site



Map 13 - SA2 Yard spaces

Lobo Meat and Poultry from Saint James Road and the social enterprise LaSCoT from Malt Street. Other vacant employment spaces typically concern poor quality industrial buildings (Peckham Park Road), the petrol station in Saint James Road and retail units within recent mixed-use development (Milestone House). It is also noted that a number of premises have been recently converted into residential through permitted development rights. This includes Wetton House and the Universal House in Saint James Road.

Identified changes

Looking at changes since 2015, there are 14 new businesses in the area including a cluster of manufacturing and creative businesses replacing a training and educational services company in Ossory Road, as well as a couple of storage and wholesale businesses. Important changes are recorded along Saint James Road with the conversion of employment buildings into residential through permitted development rights.

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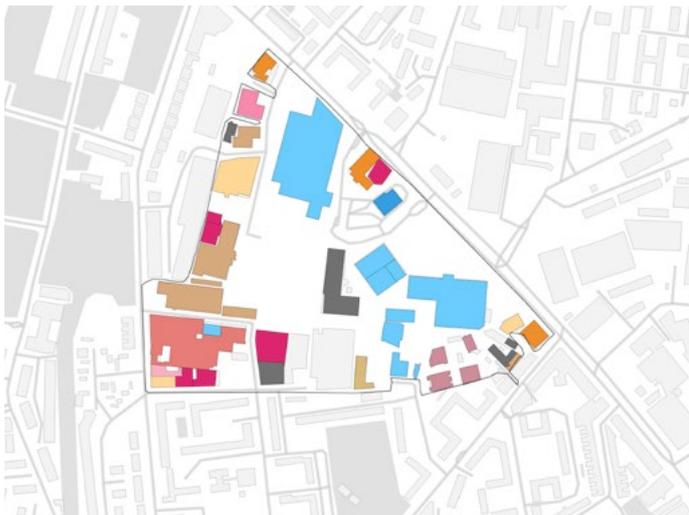
SITE ALLOCATION

OKR 10

11.61 ha

41 businesses

913 jobs



The Site Allocation OKR10 offers a diverse mix of employment spaces light industrial warehouses on Bianca Road/Latona Road, depot sites at Frensham Street and retail sheds along Old Kent Road. It therefore provides for a wide range of activities and the occupiers are varied, providing for both local and central London activities. The retail trade, creative and manufacturing sectors are particularly well represented in the area. Artist and creative studios' providers includes Space Studios and Artistic Spaces. All together, they provides 102 studios including some light industrial units.

38% of the businesses have moved to the area after 2015. New businesses are typically clustered around Ossory Road and include a cluster of manufacturing businesses (Kaymet, Stone Carving). Others sectors include Wholesale of building materials, storage and distribution. Lost businesses include Robins and Day city (Peugeot car dealer) as well few faith organisations. The coach company Excalibur has also been replaced by PDS which provides breakdown recovery services.

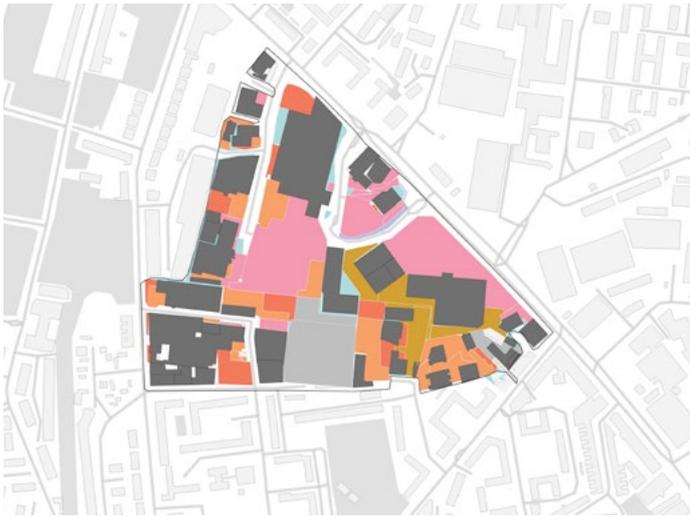
Floorspace capacity

Employment floorspace :	41,234 sqm
<i>incl. vacant:</i>	5993 sqm
Retail floorspace:	15,639 sqm
Leisure, faith, education & health:	7.672 sqm
<i>incl. vacant:</i>	284 sqm

Total employment space: 64,830 sqm
incl. vacant: 6,277 sqm

KEY

	Manufacture: Metals/Machinery		Construction		Services: Other
	Manufacture: Food related		Wholesale: Food		Retail
	Manufacture: Other		Wholesale: Other		Restaurant, Cafes, Takeaways
	Printing and Publishing		Transport and Storage		Arts, Culture, Leisure and Sports
	Utilities		Services: Education		Faith
	Vehicle Sale and Repair		Services: Public		Vacant
			Services: Professional		



Yard space capacity

Car Parking:	20,383 sqm
Yard space (storage):	6,946 sqm
Yard space (industrial servicing):	8,549 sqm
Yard space (retail servicing):	6,765 sqm
Public open space:	443 sqm
Private open space:	2,987 sqm
Vacant :	9,629sqm

Total yard space:	55,703 sqm
Total operational yard space:	22,261 sqm

KEY

- Car parking
- Operational yard space: storage
- Operational yard space: servicing (industrial)
- Operational yard space: servicing (retail)
- Public open space
- Private open space / deadspace
- Vacant

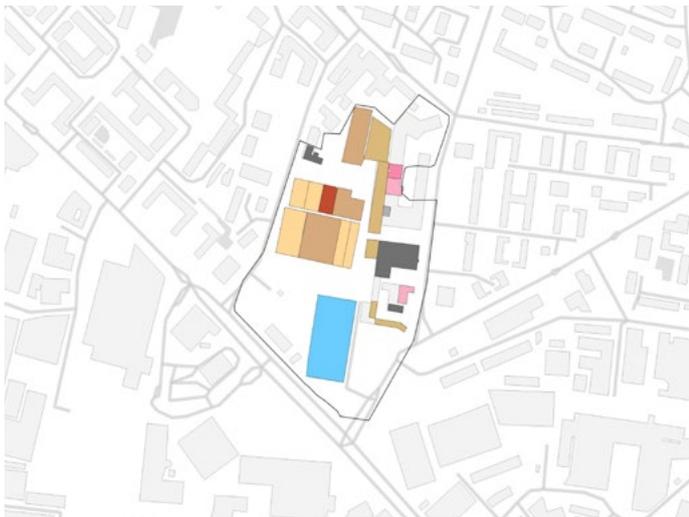
SITE ALLOCATION

OKR 11

4.29 ha

19 businesses

238 jobs



Towards the west, the Site Allocation OKR 11 is made up by large purpose-built industrial sheds that composed the Six Bridges Trading Estate as well as the Selco Builders warehouse. These sheds are mainly hosting businesses in the wholesale of building materials (electricity, plumber) as well as the distribution and storage sectors. The government car service warehouse is also located at the heart of the site allocation.

There are a few vacant buildings within the site allocation including a large warehouse along Saint James Road (previously home of the meat manufacturer Lobo Meat and Poultry) and a small office building within Six Bridges Industrial Estate (previously home of Business Mail Solutions, printing and courier services).

Floorspace capacity

Employment floorspace :	14,296 sqm
<i>incl. vacant:</i>	1,566 sqm
Retail floorspace:	3,709 sqm
Leisure, faith, education & health:	-

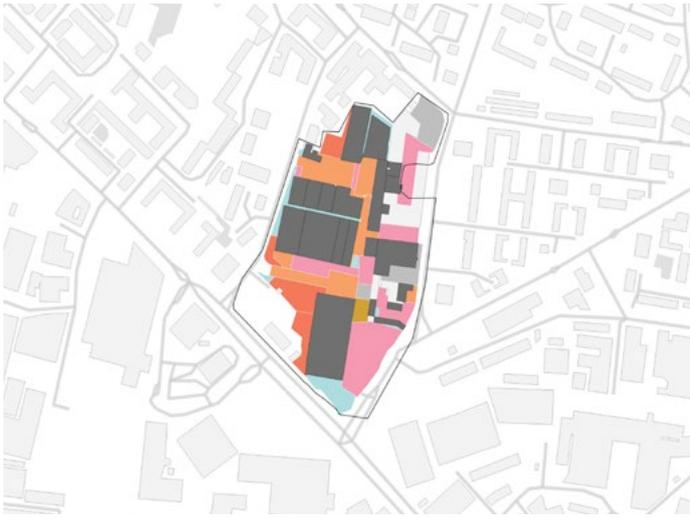
Total employment space:	18,004 sqm
<i>incl. vacant:</i>	1,566 sqm

KEY

	Manufacture: Food related		Services: Professional
	Vehicle Sale and Repair		Services: Other
	Construction		Retail
	Wholesale: Food		Unknown
	Wholesale: Other		Vacant
	Transport and Storage		
	Services: Professional		

Changes since 2015 can be most seen along St James Road where two large employment buildings have been converted into residential through permitted development rights since the 2015 audit. This have mainly impacted the creative and professional services sectors, with the conversion of Wettons (cleaning services) head office and Universal House into residential. To the north, the petrol station has also been demolished recently.

Residential conversions in buildings in this site allocation represent 9.8% of the site area in terms of floorspace.



Yard space capacity

Car Parking:	6,785 sqm
Yard space (storage):	2568 sqm
Yard space (industrial servicing):	4,779 sqm
Yard space (retail servicing):	373 sqm
Public open space:	-
Private open space:	2,245sqm
Vacant :	911 sqm
Total yard space:	17,663 sqm
Total operational yard space:	7,721 sqm

KEY

- Car parking
- Operational yard space: storage
- Operational yard space: servicing (industrial)
- Operational yard space: servicing (retail)
- Public open space
- Private open space / deadspace
- Vacant

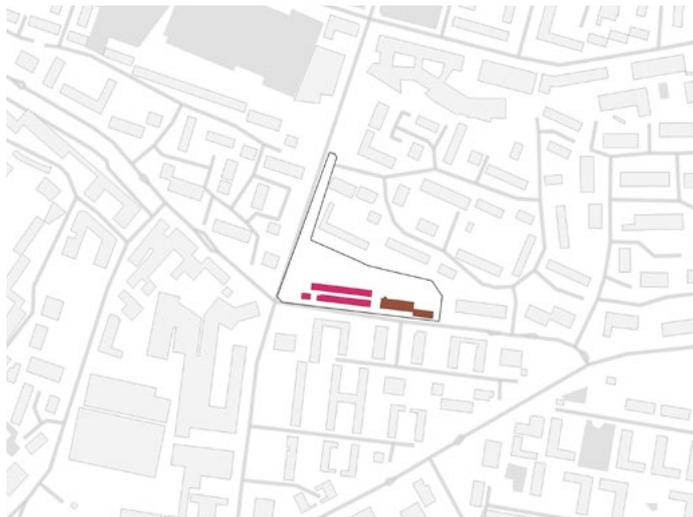
SITE ALLOCATION

OKR 12

0.7 ha

2 businesses

8 jobs



The Site Allocation OKR12 stretches along Rolls Road and is home of two businesses hosted within the Southern Railway Stables, being one of the remaining elements of the once extensive Bricklayers Arms railway goods depot. The stables are occupied by the Southwark Equestrian Association for the Disabled which provide facilities to enable physically and mentally handicapped persons to participate in leisure and recreational activities including horse-riding and other equestrian events. The metal manufacturers of the Old Southern Forge adjoins the stables and carries on traditional Blacksmith's craft. There has been no changes in occupation since 2015.

Floorspace capacity

Employment floorspace :	384 sqm
Retail floorspace:	-
Leisure, faith, education & health:	1,193 sqm

Total employment space: 1,577 sqm

KEY

-  Manufacture: Metals/Machinery
-  Arts, Culture, Leisure and Sports



Yard space capacity

Car Parking:	2,201 sqm
Yard space (storage):	592 sqm
Yard space (industrial servicing):	195 sqm
Yard space (retail servicing):	-
Public open space:	-
Private open space:	2,703 sqm
Vacant :	-

Total yard space:	5,691 sqm
Total operational yard space:	787 sqm

KEY

- Car parking
- Operational yard space: storage
- Operational yard space: servicing (industrial)
- Operational yard space: servicing (retail)
- Public open space
- Private open space / deadspace
- Vacant

2.5

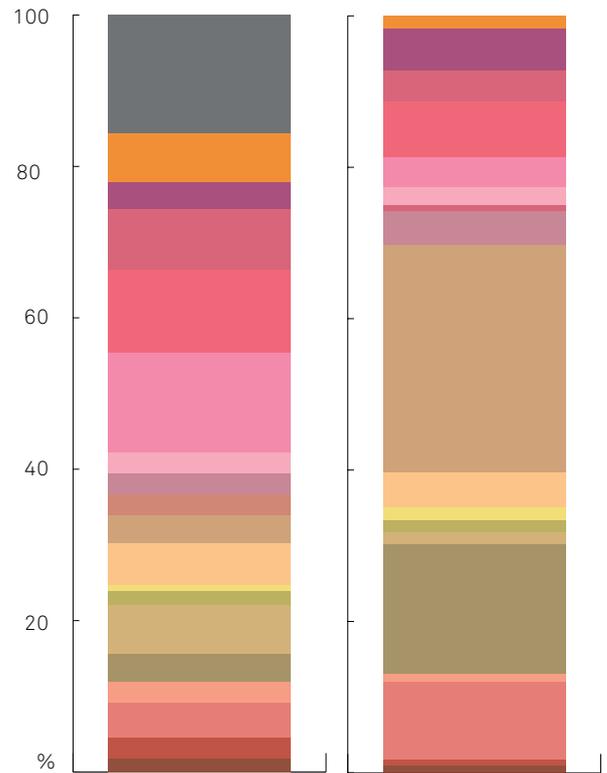
SANDGATE STREET, VERNEY ROAD AND OLD KENT ROAD (SOUTH)

92 businesses

1,869 employees

**107,391 sqm
of employment floorspace**

**47,768 sqm
of operational yardspace**



KEY

Business sector

 Manufacture: Metals/Machinery	 Vehicle Sale and Repair	 Services: Education	 Arts, Culture, Leisure and Sports
 Manufacture: Food related	 Construction	 Services: Public	 Faith
 Manufacture: Other	 Wholesale: Food	 Services: Professional	 Unknown
 Printing and Publishing	 Wholesale: Other	 Services: Other	 Vacant
 Utilities	 Transport and Storage	 Retail	 Building site
		 Restaurant, Cafes, Takeaways	



Business activity

The 92 businesses identified in the Sandgate Street, Verney Road & Old Kent Road (South) sub-area make up 14% of businesses resident in the OKR area. Given the variety of premises and businesses, the sub-area has no particularly dominant industries however the utilities, distribution, construction and manufacturing sectors are well represented.

To the east, the sub-area is occupied by Southwark's Integrated Waste Management Facilities (IWMF) and New Cross Electricity Sub Station. The remaining gas holders no longer store gas. Between Verney Road and the Old Kent Road, there is a mix of medium and large sized industrial units accommodating a variety of industrial and light industrial activities. It is noted that there is a cluster of creative production businesses and businesses that link directly into the London's creative economy with the presence of Souvenir Scenic Studios, Gerriets, Constantine, Setwo and the newly opened Capital Studios that provides workspaces for artists, makers and creative professionals. Along Old Kent Road, businesses are mainly from the retail trade sector, under the form of large retail shed with associated car park to the north and under the form of small high street type retail unit to the south. There are also a couple of religious facilities within the sub-area, mainly hosted within old and poor quality industrial stock as well as a number of non-B-class uses such as a nightclub and hot food establishments. Finally, with the presence of both Veolia recycling facilities and Southwark metals, the recycling sector is also important in the sub-area.

Employment

Just under 1890 individuals are estimated to be working across the sub-area, with the average business employing 17 people. Where reported, the average business in this sub-area has been at their current location for 13 years. The largest employers include Southwark Council Vehicle Maintenance (407), Veolia (282) the fine arts logistic company Constantine Ltd (145) and the theatrical supplier Gerriets (110). The studio provider Artistic Spaces has recently took over a lease on Action

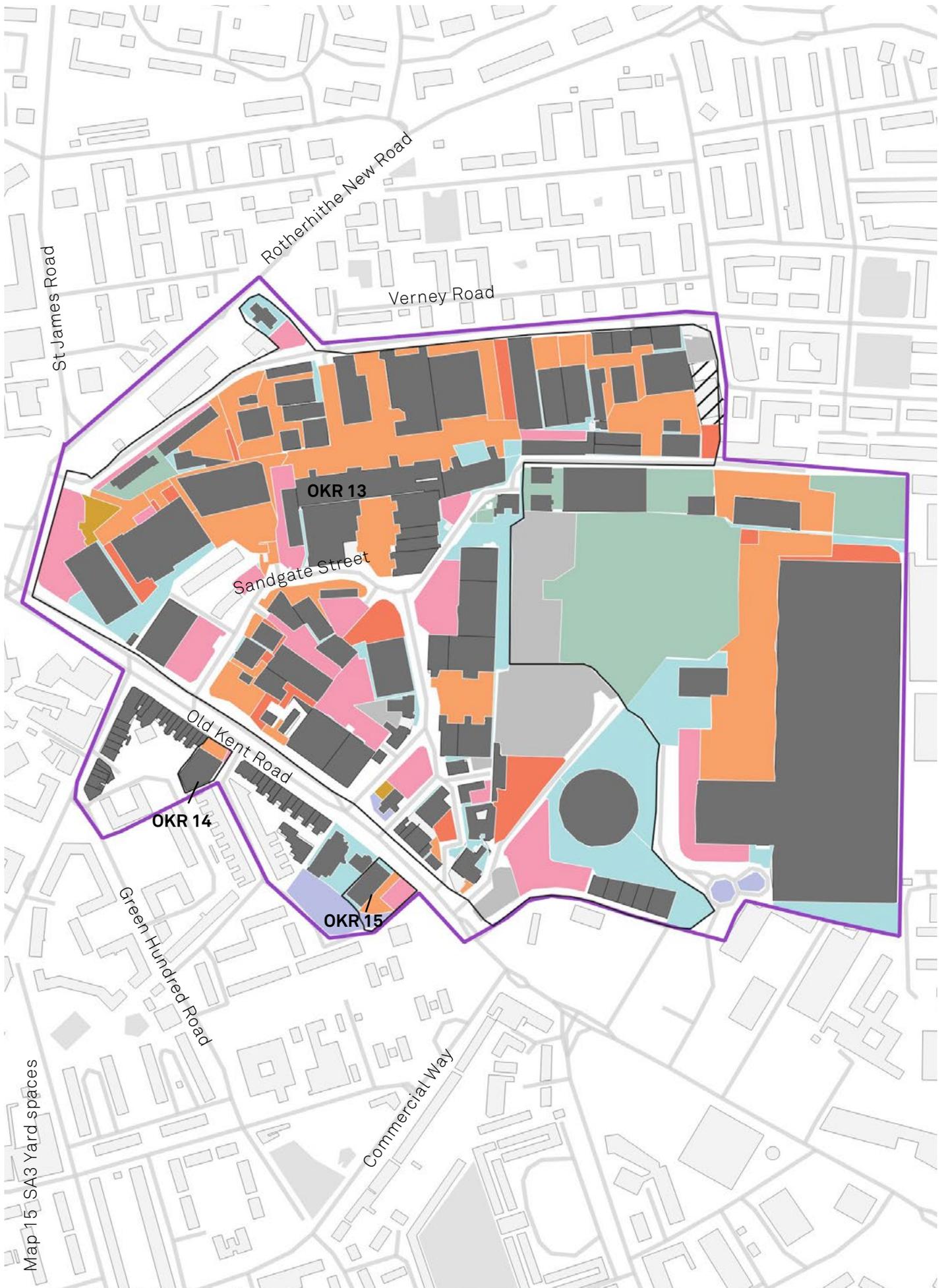
House and provide workspace for 65 individuals. Newton House in Verney Road has also been subject to recent investment and is now managed by Capital Industrial, providing a range of studio and light industrial spaces targeted to makers and creatives. These evidence of reinvestment in stock, particularly in Verney road, suggest it is an area that is meeting business needs.

Workspace

The urban fabric is somewhat fragmented and made of a range of different building from large purpose-built industrial sheds, to dense industrial buildings and large yard spaces, Overall, the stock is predominantly dating from the 1960s-70s, with some older units also present. The employment density is not uniform across the sub-area. Transport and storage businesses such as Constantine are space hungry and overall tend to be less dense than multi-occupier premises mixing desk-based and light industrial activities. The stock closest to the Old Kent Road tends to be of a poorer quality and a couple of yard spaces and buildings appear to be under-used or unoccupied.

KEY

-  Car parking
-  Operational yard space: storage
-  Operational yard space: servicing (industrial)
-  Operational yard space: servicing (retail)
-  Public open space
-  Private open space / deadspace
-  Utilities
-  Vacant
-  Building site



Vacant employment building floorspace concerns just under 4% of the sub-area total employment building floorspace. Along Old Kent Road, there is a relatively large number of vacant retail units. These are typically long-term vacant units and are in poor condition. Towards the North in the more industrial part of the sub-area, some buildings have been recently vacated however vacancy remains low. Regeneration have started in this sub-area with the north-eastern side currently being redeveloped.

Looking at the opposite map, plot ratios are currently low in the sub-area. Most of the buildings are serviced by large yard spaces that are unequally used.

Recent changes

Since 2015, a couple of businesses have moved in and out of the sub-area. Businesses moving out typically relate to the printing and publishing, construction and distribution sectors while businesses having moved in work in the creative, manufacturing of food and beverage as well as professional services sectors. These are typically of a smaller scale than the businesses that have moved out. Some pre-existing businesses have also scaled-up, taking on more spaces (Constantine, Souvenir).

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SITE ALLOCATION

OKR 13

15.3 ha

59 businesses

1,449 jobs



Floorspace capacity

Employment floorspace :	56,401 sqm
<i>incl. vacant:</i>	7,441 sqm
Retail floorspace:	6,290 sqm
Leisure, faith, education & health:	4,510 sqm
<i>incl. vacant:</i>	603 sqm

Total employment space: 67,201 sqm
incl. vacant: 8,044sqm

The Site Allocation OKR13 is large in size and contains multiples businesses of different size and sector. Most of the site is designated as Strategic Industrial Land in the Southwark Local Plan (2007), recognizing the importance of the site's industrial economy. However, the all site is proposed to be released within the New Southwark Local Plan. While the businesses are varied, covering a large spectrum of activities, the area is characterised by the presence of a cluster of creative production businesses working directly within the creative sector or supporting the creative economy.

Since 2015, businesses have left and others have moved to the area. New businesses includes the screen-printing company 3D rail, the training centre Bureau Veritas, the management service company Dajon Data, the drink manufacturers Hej and Small Beer Brewery, the set building and prop making company Setwo, among others. Businesses that have moved since 2015 include the freight management company Ceva logistics, the catering company Apetito and numbers of car related and distribution sector businesses.

It is also noted that some existing businesses have grown since 2015, taking up more space. This includes the set making company Souvenir Scenic Studios and the fine art logistic company Constantine.

KEY

	Manufacture: Metals/Machinery		Vehicle Sale and Repair		Services: Education		Arts, Culture, Leisure and Sports
	Manufacture: Food related		Construction		Services: Public		Faith
	Manufacture: Other		Wholesale: Food		Services: Professional		Unknown
	Printing and Publishing		Wholesale: Other		Services: Other		Vacant
	Utilities		Transport and Storage		Retail		Building site
					Restaurant, Cafes, Takeaways		



Yard space capacity

Car Parking:	15,505 sqm
Yard space (storage):	4,636 sqm
Yard space (industrial servicing):	24,963 sqm
Yard space (retail servicing):	781 sqm
Public open space:	168 sqm
Private open space:	14,928 sqm
Vacant :	12,559 sqm
Utilities:	1,090 sqm

Total yard space:	74,629 sqm
Total operational yard space:	30,380 sqm

KEY

	Car parking		Public open space
	Operational: storage		Private open space
	Operational servicing (industrial)		Utilities
	Operational servicing (retail)		Vacant
			Building site

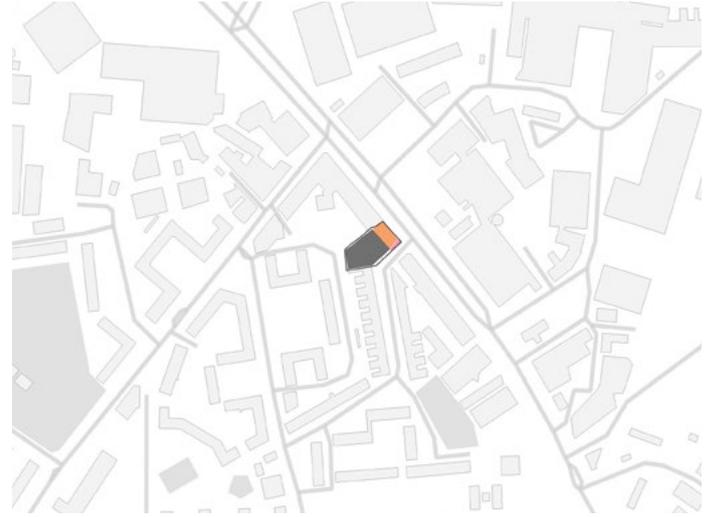
SITE ALLOCATION

OKR 14

0.1 ha

1 businesses

4 jobs



Floorspace capacity

Employment floorspace :	651 sqm
Retail floorspace:	-
Leisure, faith, education & health:	-

Total employment space: 651 sqm

The Site Allocation OKR 14 is home to a car service centre (sui-generis). A small yardspace is used for both parking and servicing purposes at the front of the building.

Yard space capacity

Car Parking:	31 sqm
Yard space (storage):	-
Yard space (industrial servicing):	209 sqm
Yard space (retail servicing):	-
Public open space:	-
Private open space:	-
Vacant :	-
Utilities:	-

Total yard space: 240 sqm
Total operational yard space: 209 sqm

KEY

 Vehicle Sale and Repair

KEY

 Car parking

 Operational yard space: servicing (industrial)

SITE ALLOCATION

OKR 15

0.2 ha

1 businesses

4 jobs



Floorspace capacity

Employment floorspace :	590 sqm*
Retail floorspace:	-
Leisure, faith, education & health:	-

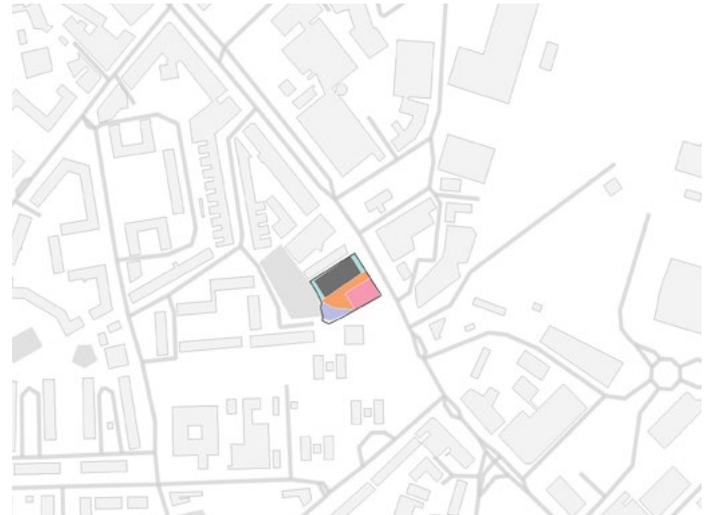
Total employment space: 590 sqm *

* (Sui generis car-wash)

The Site Allocation OKR 15 is home to Kwik-Fit, a car service centre (sui-generis), hosted in a purpose-built industrial shed. A car park and servicing yard is adjoining the building.

KEY

 Vehicle Sale and Repair



Yard space capacity

Car Parking:	382 sqm
Yard space (storage):	-
Yard space (industrial servicing):	419 sqm
Yard space (retail servicing):	-
Public open space:	201 sqm
Private open space:	152 sqm
Vacant :	-
Utilities:	-

Total yard space: 801 sqm

Total operational yard space: 419 sqm

KEY

 Car parking

 Operational yard space: servicing (industrial)

 Public open space

 Private open space / deadspace

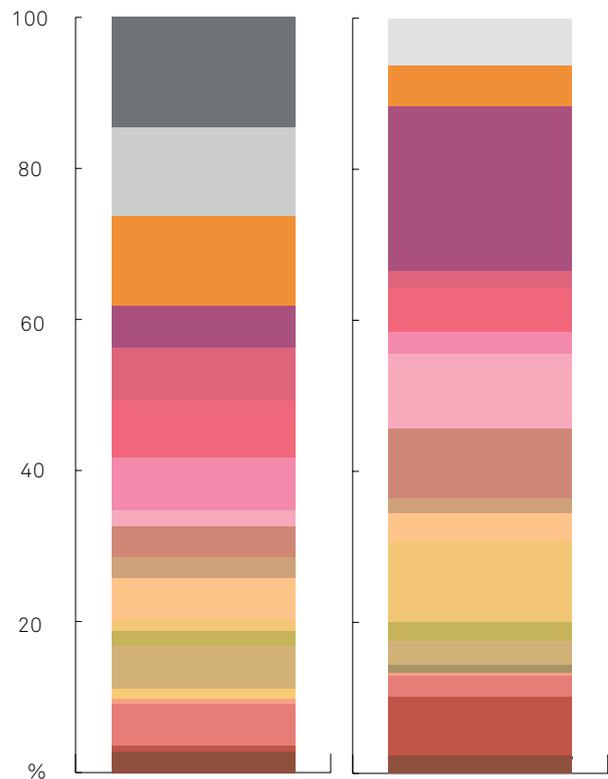
2.6 HATCHAM, ILBERTON & OLD KENT ROAD (SOUTH)

178 businesses

1,419 employees

**88,673 sqm
of employment floorspace**

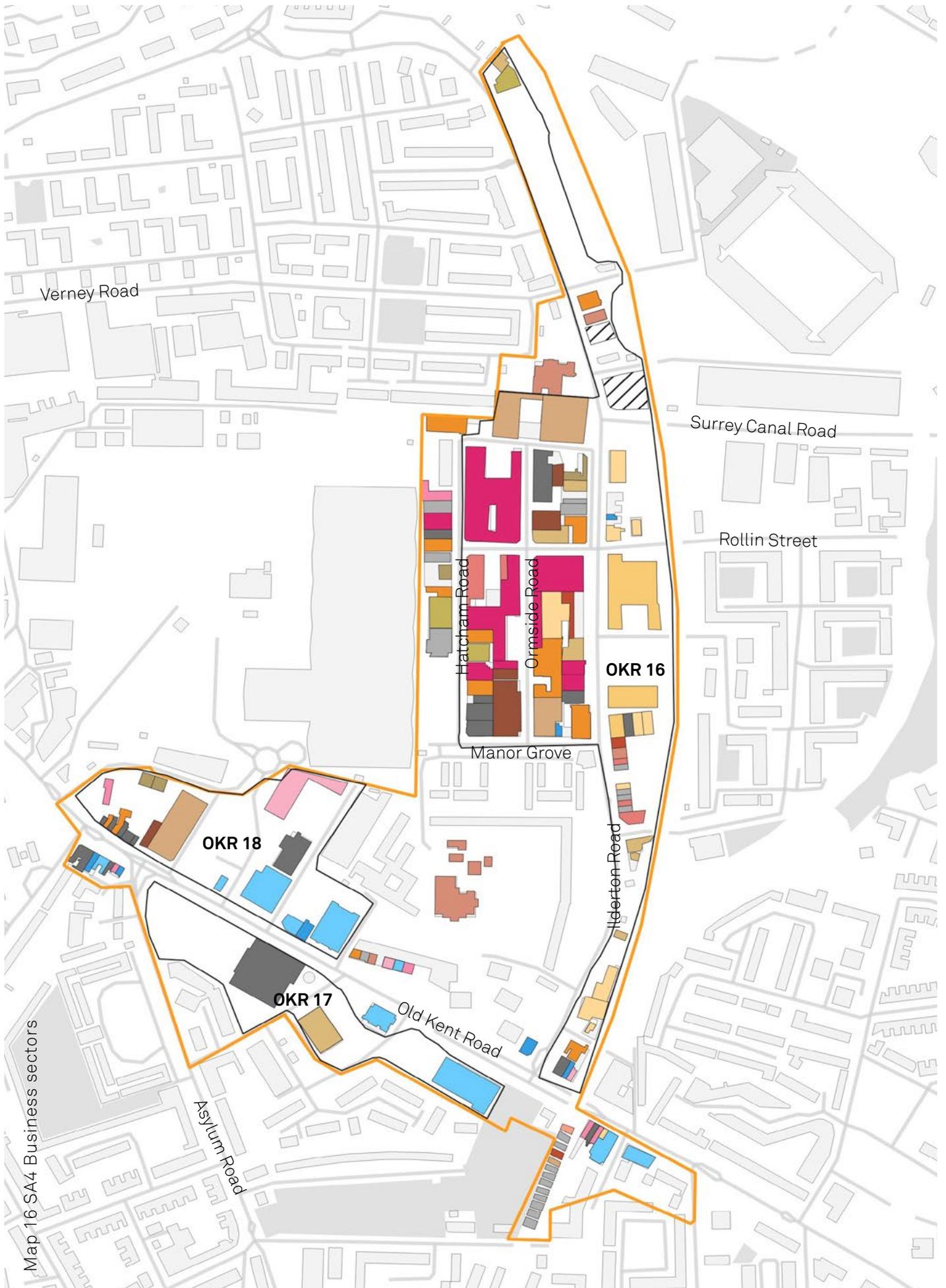
**27,329 sqm
of operational yardspace**



KEY

Business sector

 Manufacture: Metals/Machinery	 Vehicle Sale and Repair	 Services: Education	 Arts, Culture, Leisure and Sports
 Manufacture: Food related	 Construction	 Services: Public	 Faith
 Manufacture: Other	 Wholesale: Food	 Services: Professional	 Unknown
 Printing and Publishing	 Wholesale: Other	 Services: Other	 Vacant
 Utilities	 Transport and Storage	 Retail	 Building site
		 Restaurant, Cafes, Takeaways	



Map 16 SA4 Business sectors

The Hatcham, Ilderton & Old Kent Road (South) sub-area stretches along the railway that link Queens Road Peckham to South Bermondsey. The presence of a couple of buildings with multiple occupiers and managed workspaces (targeted to SMEs, start-ups and creatives) differentiates the sub-areas from the rest of the OKR area.

Business activity

The 178 businesses identified make up 11% of all businesses resident in the Old Kent Road area. This figure includes the 52 businesses identified as working from multi-occupancy buildings (Capital Studios, Penarth Centre) but does not include the artists and creatives hosted within V22 building in Ilderton Road (however, these are captured in the employment figure) . Similar to the other sub-areas, retail trade activities are clustered along Old Kent Road with the presence of large retail sheds as well as small high street type retail units. To the South of Southwark’s Integrated Waste Management Facilities (IWMF), the majority of the businesses are operating from the small industrial estate in Devon Street and the Daisy Business Centre. The latter is a multi-occupancy building hosting 29 businesses, the majority of them working within the professional and education services sectors. Two faith organisations are also based in the building. Around Hatcham Road, the area is characterised by packed units and the presence of small and micro businesses from the services, wholesale, manufacturing and creative sectors. There are also a large number of faith organisations. Some of the major occupiers on the site are Diespeker & Co. (construction/trade/manufacturing), James Glancy Design (design and manufacturing) and Henfield Self Storage (storage). Stretching along the railway are a mix of businesses from the retail trade, construction and vehicle repair sectors, and there is a large number of vacant and under-used yard spaces. The Canterbury Industrial Estate is well-occupied by a range of businesses, mainly working in wholesale.

Employment

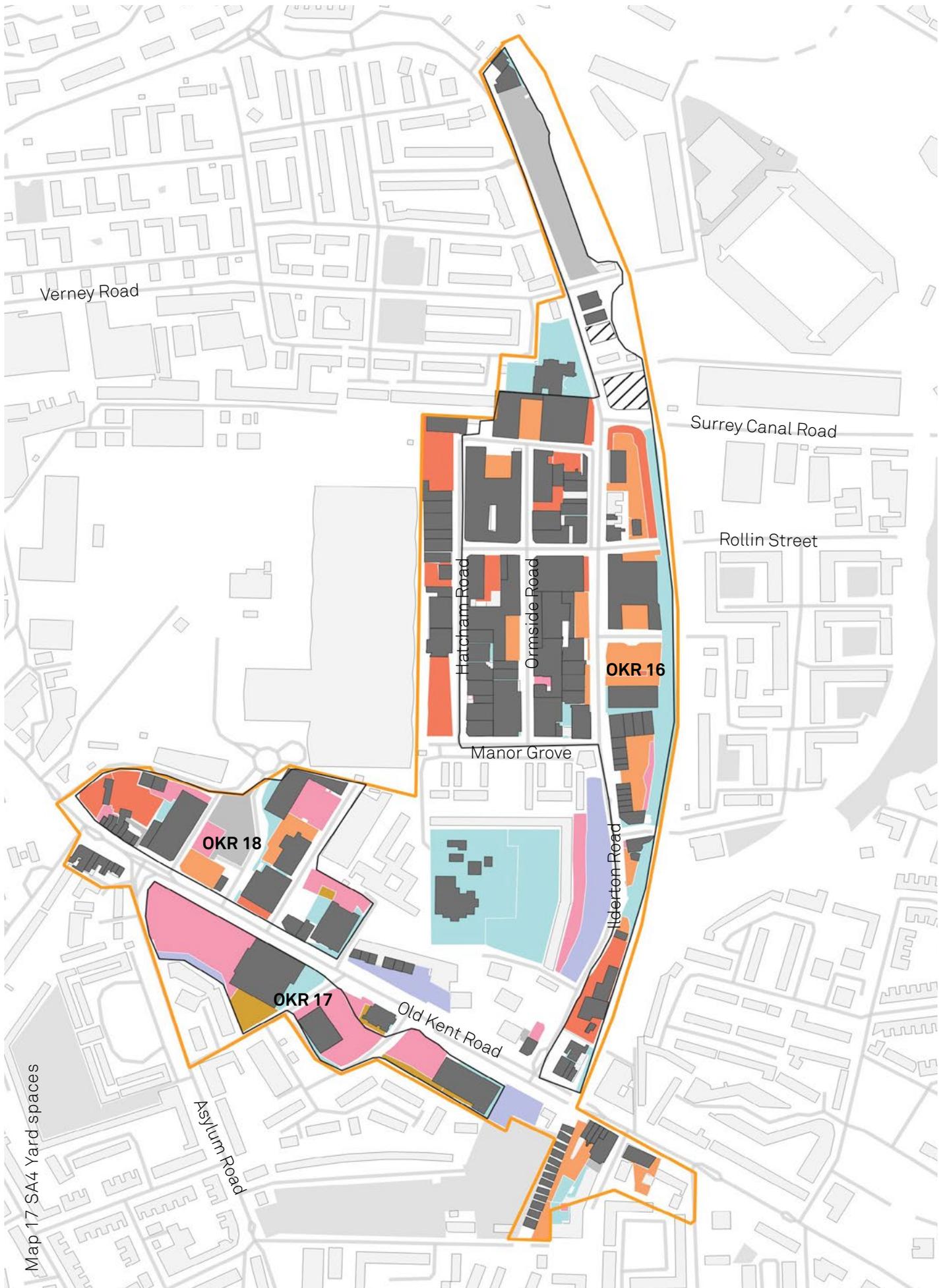
Just under 1419 individuals are estimated to be working across the sub-area, with the average business employing 9 people which highlight the presence of relatively small businesses. 22% of jobs relates to the Arts, culture and leisure sector while Manufacture of food and beverage, wholesale and professional services sectors respectively provide 10% of the local employment. Largest employers include Leathams (food distribution, 150 employees), Fooditude (food manufacturer, 135 employees), Iceland Warehouse (retail, 25 employees), Saltash Construction (building services, 25) and James Glancy Design (public display design, 23 employees). Studio providers V22 and Capital Studios (Hatcham Studios) are together providing workspaces for more than 201 individuals.

Workspace

93,813sqm of employment building floorspace have been recorded in the sub-area. In addition, there is 25.631sqm of operational yard space, used for both storage and servicing purposes. Around Hatcham, Ormside and Ilderton Road, the employment density is relatively high. Plots are typically small in size and some of the buildings are hosting multiple units and businesses. Overall the stock varies in quality but predominantly comprises of older stock in

KEY

-  Car parking
-  Operational yard space: storage
-  Operational yard space: servicing (industrial)
-  Operational yard space: servicing (retail)
-  Public open space
-  Private open space / deadspace
-  Vacant
-  Building site



poor condition. Vacancy is relatively important and occupation is uncertain in some of the building, particularly in Hatcham Road. Along Old Kent Road, there are large retail sheds and car parks. There are also a couple of large vacant buildings, including the former Toys'R Us site. Around Devon Street and Sylvan Grove, the employment buildings are of a better quality and including light industrial units (B1C/B8) in the Rich Industrial Estate and a mix of light industrial/office units (B1C/B1a) within Daisy Business Centre.

Identified changes

Since 2015, 42 new businesses have been recorded. This includes mainly businesses working within the creative, manufacturing and services sectors. Businesses that have left the area includes businesses working within vehicle sale and repair, construction and printing and publishing sectors. A high business churn have been recorded in the small retail units along Old Kent Road.

V22 studios in Ilderton Road was still in operation at the time of the survey. However, it is noted that the building has been vacated since then, impacting 156 artists and creatives that were hosted in the building.

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SITE ALLOCATION

OKR 16

8.99 ha

84 businesses

859 jobs



The Site Allocation OKR16 has seen its number of employees going up since 2015 with the opening of V22 studios and the Penarth Centre that provide workspaces for more than 230 people, in addition to the remaining presence of large employers such as Saltash Construction (25 employees), James Glancy Design and Purpose Powder Coatings Ltd (15 employees). While V22 studios provides workspaces for quasi-exclusively artists and creative professionals, the Penarth Centre provide workspaces for a wide range of businesses from the services sector to the manufacture and retail trade sectors. A couple of faith organisations are also located within the building.

All along the railway, a number of businesses have closed or moved, leaving behind unoccupied or under-used yard spaces and vacant plots. This concerns mainly vehicle related businesses as well as businesses from the construction sec

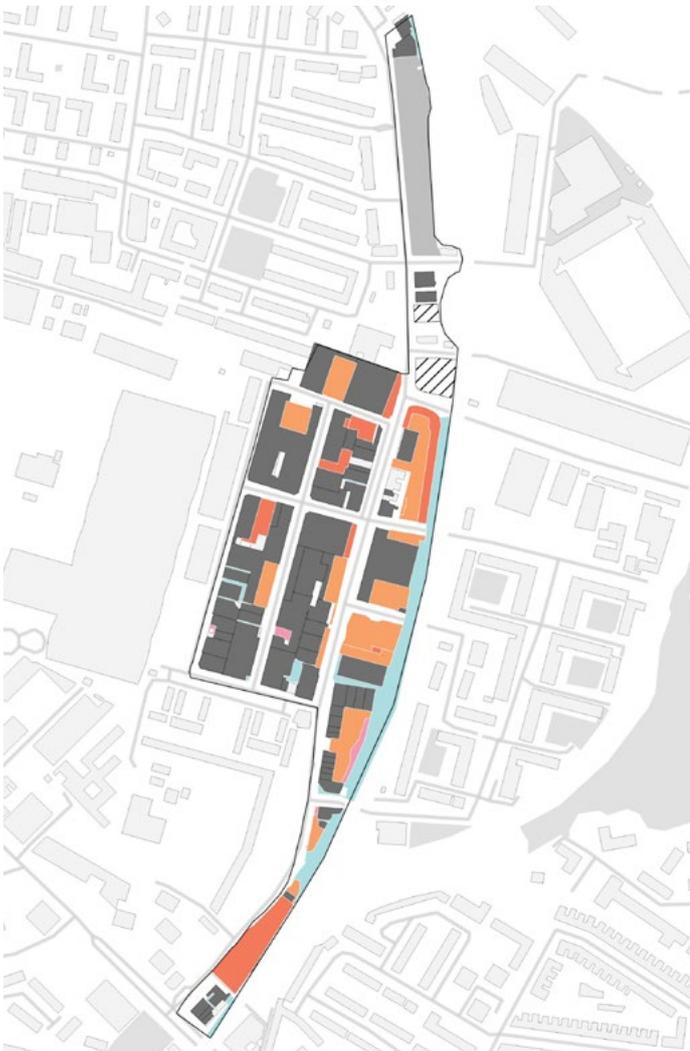
KEY

	Manufacture: Metals/Machinery		Services: Education
	Manufacture: Food related		Services: Professional
	Manufacture: Other		Services: Other
	Printing and Publishing		Retail
	Vehicle Sale and Repair		Restaurant, Cafes, Takeaways
	Construction		Arts, Culture, Leisure and Sports
	Wholesale: Food		Unknown
	Wholesale: Other		Vacant
	Transport and Storage		Building site

Floorspace capacity

Employment floorspace :	39,887 sqm
<i>incl. vacant:</i>	3,538 sqm
Retail floorspace:	636 sqm
<i>incl. vacant:</i>	178 sqm
Leisure, faith, education & health:	7,599 sqm

Total employment floorspace: 48,121 sqm
incl. vacant: 3,716 sqm



Yard space capacity

Car Parking:	587 sqm
Yard space (storage):	6,036 sqm
Yard space (industrial servicing):	10,028 sqm
Yard space (retail servicing):	-
Public open space:	2,704 sqm
Private open space:	7,548 sqm
Vacant :	5,439 sqm

Total yard space:	32,342 sqm
Total operational yard space:	16,064 sqm

KEY

- Car parking
- Operational yard space: storage
- Operational yard space: servicing (industrial)
- Public open space
- Private open space / deadspace
- Vacant
- Building site

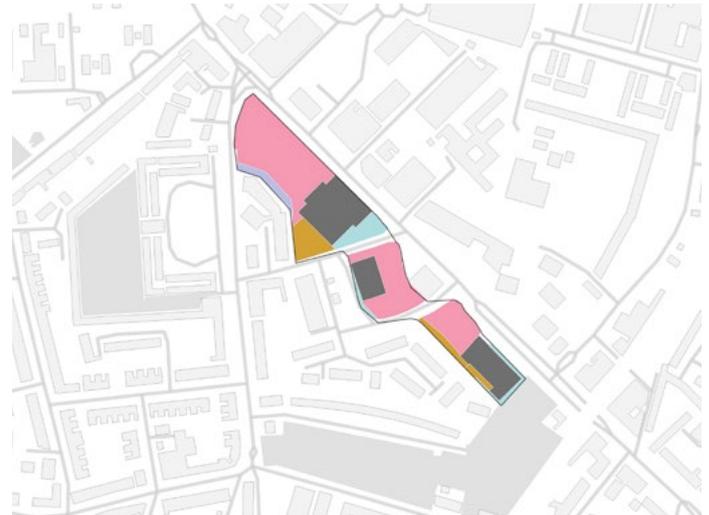
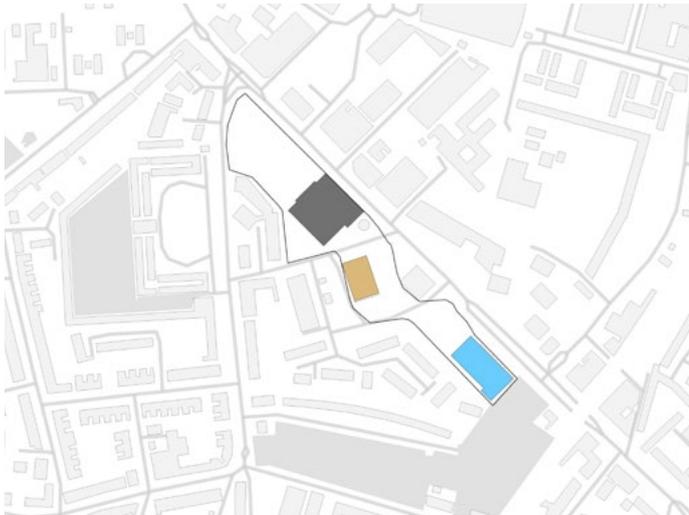
SITE ALLOCATION

OKR 17

1.90 ha

2 businesses

25 jobs



Floorspace capacity

Employment floorspace :	-
Retail floorspace:	5,764 sqm
<i>incl. vacant:</i>	<i>2,889 sqm</i>
Leisure, faith, education & health:	-
Total employment floorspace:	5,764 sqm
<i>incl. vacant:</i>	<i>2,889 sqm</i>

The Site Allocation 17 is home of 2 businesses employing 25 people in total. With the recent closure of Toys 'R' Us due to the company's liquidation, the number of employees in the area have declined since 2015. The site is typically characterised by the presence of large retail shed and associated car parks.

KEY

	Vehicle Sale and Repair
	Retail
	Vacant

Yard space capacity

Car Parking:	8,858 sqm
Yard space (storage):	-
Yard space (industrial servicing):	-
Yard space (retail servicing):	1,744 sqm
Public open space:	904 sqm
Private open space:	1,706 sqm
Vacant :	-
Total yard space:	13,212 sqm
Total operational yard space:	1,744 sqm

KEY

	Car parking
	Operational yard space: servicing (retail)
	Public open space
	Private open space / deadspace

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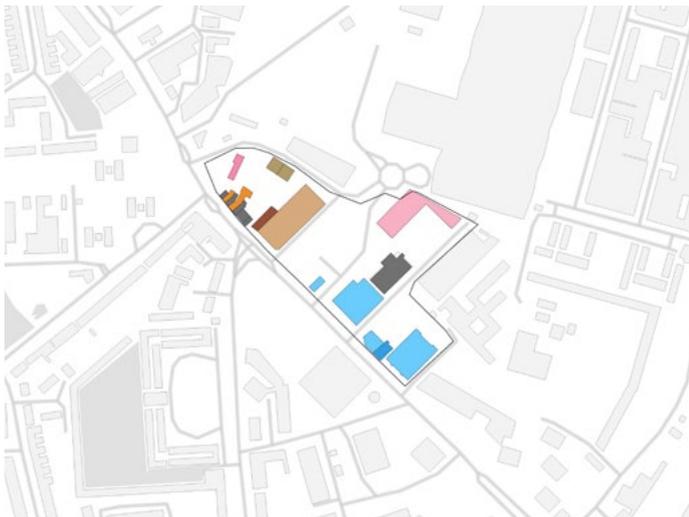
SITE ALLOCATION

OKR 18

2.72 ha

42 businesses

217 jobs



Including the businesses that are hosted in Daisy Business Park, the Site Allocation OKR 18 is home to 42 businesses employing around 217 people. More than a half of them are based in Daisy Business Park which provide workspaces for a various businesses that typically have a desk-based activity and are from the professional and education services sector. However, the business park also hosts a couple of businesses from the creative, tech and media sectors as well as a faith organisation.

The rest of the Site Allocation, along Old Kent Road, is composed by large retail or industrial shed hosting businesses from the retail trade or storage sectors. There is also a petrol station, a care hire business and a couple of small retail businesses. However, vacancy within the small retail unit is important. The old office building adjoining Daisy Business Park is vacant.

Floorspace capacity

Employment floorspace :	7,559 sqm
<i>incl. vacant:</i>	1,407 sqm
Retail floorspace:	5,724 sqm
<i>incl. vacant:</i>	457 sqm
Leisure, faith, education & health:	787 sqm

Total employment floorspace: 14,069 sqm
incl. vacant: 1,864sqm

KEY

 Manufacture: Metals/Machinery	 Restaurant, Cafes, Takeaways
 Utilities	 Faith
 Transport and Storage	 Vacant
 Services: Professional	
 Services: Other	
 Retail	



Yard space capacity

Car Parking:	3,871 sqm
Yard space (storage):	1,917 sqm
Yard space (industrial servicing):	1,938 sqm
Yard space (retail servicing):	144 sqm
Public open space:	
Private open space:	1,503 sqm
Vacant :	2,380 sqm

Total yard space:	11,753 sqm
Total operational yard space:	3,999 sqm

KEY

- Car parking
- Operational yard space: storage
- Operational yard space: servicing (industrial)
- Operational yard space: servicing (retail)
- Public open space
- Private open space / deadspace
- Vacant

2.7

SOUTH BERMONDSEY

99 businesses

1,199 employees

**69,780 sqm
of employment floorspace**

**20,321 sqm
of operational yardspace**

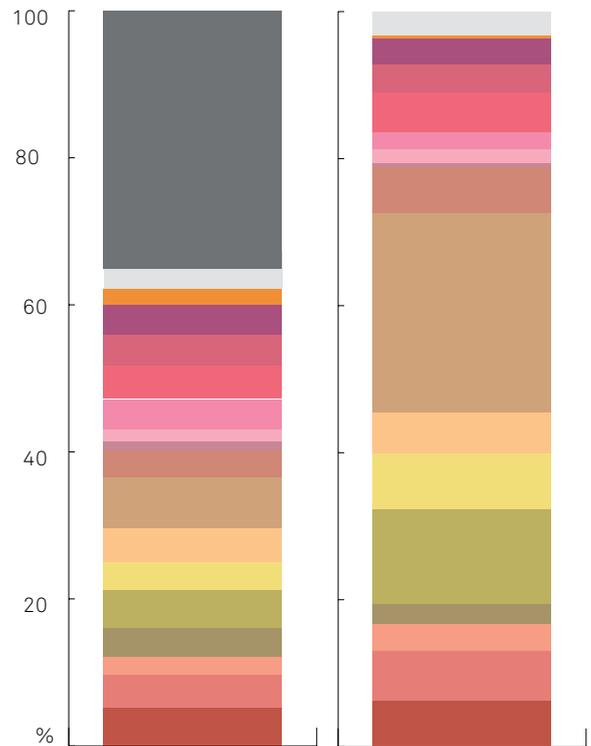


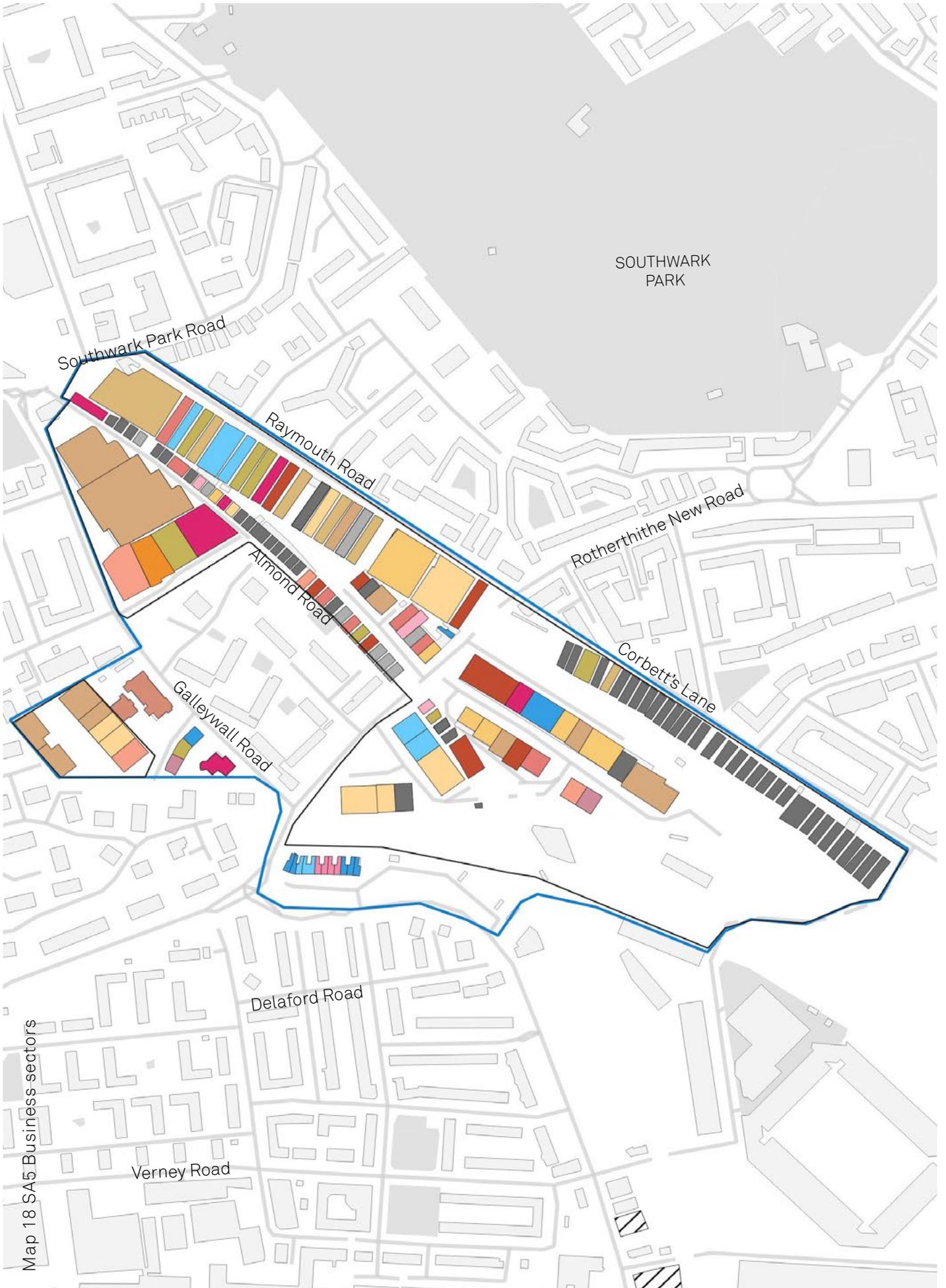
Fig 14.1 Business breakdown by sector

Fig 14.2 Employment number breakdown by sector

KEY

Business sector

 Manufacture: Metals/Machinery	 Vehicle Sale and Repair	 Services: Education	 Arts, Culture, Leisure and Sports
 Manufacture: Food related	 Construction	 Services: Public	 Faith
 Manufacture: Other	 Wholesale: Food	 Services: Professional	 Unknown
 Printing and Publishing	 Wholesale: Other	 Services: Other	 Vacant
 Utilities	 Transport and Storage	 Retail	 Building site
		 Restaurant, Cafes, Takeaways	



Just north of the Sub-area 4, the South Bermondsey sub-area stretches along the railway that link towards South Bermondsey. It is composed by a succession of railway arches as well as four industrial estates including Admiral Hyson Industrial Estate, Rotherhithe Business Estate, Galleywall Trading Estate and Bermondsey Trading Estate. A small retail parade in the north of Ilderton Road is also included in the sub-area. Most of the sub-area is designated as Strategic Preferred Industrial Location (SIL) in the proposed New Southwark Plan, reflecting the importance of the area for the industrial and local economy.

Business activity

The 99 businesses identified make up 14% of all businesses resident in the Old Kent Road area. The map and graphs show an important vacancy. This mainly concerns railway arches which were unoccupied at the time of the survey due to refurbishment work (along Corbett’s Lane and Almond Road).

Overall, business sectors are varied in the sub-area, with the wholesale sector counting for 13% of the total businesses, half of them being food and beverage related; the manufacturing sector counts for almost 15% of the businesses; transport and storage for 11% and construction for 8%. There are also a number of garages and engineering services businesses, mainly located within railway arches. Particularly of interest, there is a small cluster of businesses working in event services and catering and there are evidence of local supply chain between the food manufacturing businesses and the catering and event planning companies. Finally, Bermondsey Trading Estate is also home to a couple of retail businesses related to the construction sector including Screwfix and Tool Station.

Employment

1002 jobs have been recorded in the sub-area. The large majority of businesses are small in size with an average number of employees of 8. However, the sub-area is home to large employers, including the distribution services businesses FedEx (141)

and CMS Distribution (75), and the creative event production agency Event concept (75).

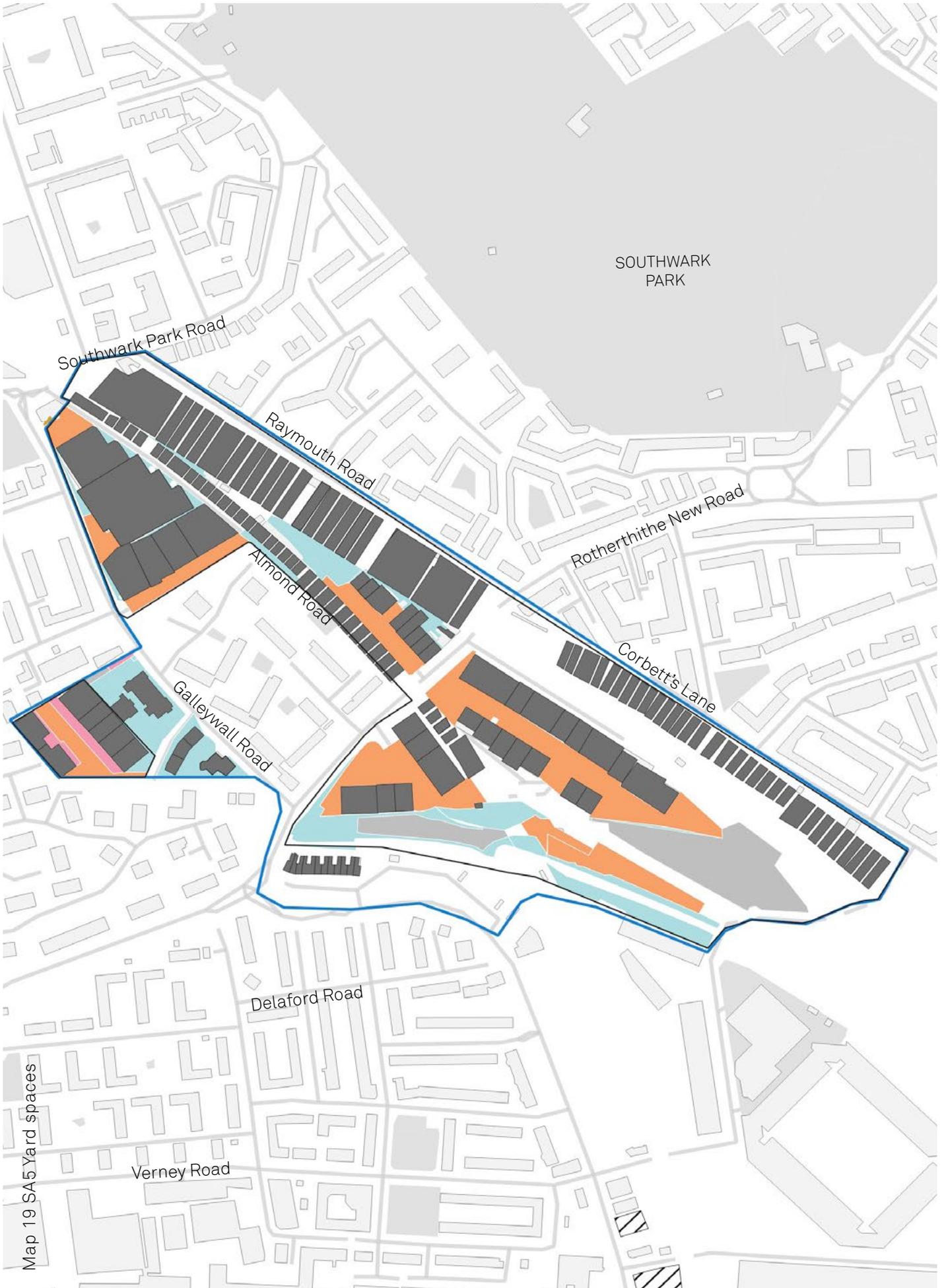
Workspace

The sub-area is somewhat segregated by railway lines, however, most of the industrial buildings are well-serviced. 69,948 sqm of employment building floorspace have been recorded in the sub-area. In addition, there is 23,801 sqm of operational yard space used for both storage and servicing, bringing the total employment floorspace to 9,3ha.

Within the four industrial estates, the building stock is primarily industrial building from the latter half of the 20th century and a number of units have been refurbished recently to a good standard. A part from the buildings in Galleywall Industrial Estate, the buildings are typically small in size, targeting small to medium size businesses. Overall, more than 50% of the sub-area jobs are found in industrial building and just above 30% are found in the railway arches. The railway arches fronting Raymouth Road are large in size and have a front yard, while the railway arches within Almond Road are smaller in size, however, these have been recently or are in the process of being refurbished. Not taking into account the railway arches in refurbishment, the

KEY

-  Car parking
-  Operational yard space: storage
-  Operational yard space: servicing (industrial)
-  Operational yard space: servicing (retail)
-  Public open space
-  Private open space / deadspace
-  Vacant
-  Building site



vacancy is low and recent investment in both the railway arches and other building stock illustrate that the area is attractive for businesses.

Recent changes

The area has not experienced a high level of changes since 2015 in terms of business sector and number of jobs. However, a couple of employment sites have changed hands. In the arches along Raymouth Road, new businesses include mainly food and beverage manufacturers (Stella Coffee and Tea, Bbakery, Partizan Brewing), retailers (Kingsley Interiors) and the event venue and gallery Arch Collective. A number of food and event related businesses have also moved in the Rotherhithe and Bermondsey Business Estates which, together, constitutes a cluster serving London's food industry.

It is noted that important refurbishment work is ongoing in Almond Road which will lead to additional employment floorspace in the near future.

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SPIL 1

13.18 ha

76 businesses

1,002 jobs



The South Bermondsey Strategic Preferred Industrial Location 1, as designed by the New Southwark Plan, is home to 76 businesses providing 1002 jobs. Between the railway viaducts is the busy Bermondsey Trading Estate which provides space in warehouses and arches for a variety of businesses including manufacturing and metal works businesses, breweries, masonry, food production and distribution. To the north, the Rotherhithe Business Estate and Galleywall Trading Estate is composed by relatively large industrial units and is home to slightly larger companies including logistic and distribution companies, publishers and event planning businesses. The records archive for the Church of England is also located in the Galleywall Trading Estate. Along Almond Road and Corbett's Lane, the many railway arches are in poor condition and are currently under refurbishment to provide new employment spaces.

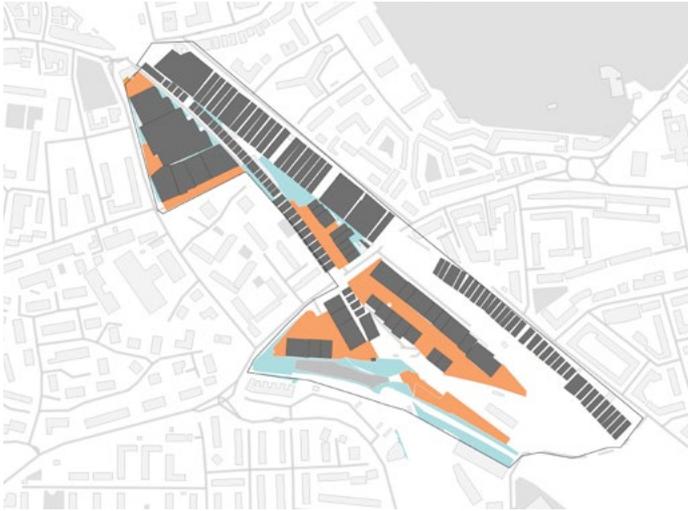
Floorspace capacity

Employment floorspace :	59,277 sqm
<i>incl. vacant:</i>	9,221 sqm
Retail floorspace:	2,044 sqm
Leisure, faith, education & health:	1,134 sqm

Total employment space:	62,454 sqm
<i>incl. vacant:</i>	9,221 sqm

KEY

 Manufacture: Metals/Machinery	 Wholesale: Other
 Manufacture: Food related	 Transport and Storage
 Manufacture: Other	 Services: Professional
 Printing and Publishing	 Services: Other
 Vehicle Sale and Repair	 Retail
 Construction	 Restaurant, Cafes, Takeaways
 Wholesale: Food	 Arts, Culture, Leisure and Sports



Yard space capacity

Car Parking:	-
Yard space (storage):	-
Yard space (industrial servicing):	18,560 sqm
Yard space (retail servicing):	239 sqm
Public open space:	-
Private open space:	11,006 sqm
Vacant :	2,041 sqm
Total yard space:	38,686 sqm
Total operational yard space:	18,799 sqm

KEY

- Operational yard space: storage
- Operational yard space: servicing (industrial)
- Operational yard space: servicing (retail)
- Private open space / deadspace
- Vacant

SPIL 2

0.62 ha

6 businesses

47 jobs



Floorspace capacity

Employment floorspace :	3,563 sqm
Retail floorspace:	-
Leisure, faith, education & health:	-

Total employment space: 3,563 sqm

Not designated as in the Southwark Local Plan (2012), the Admiral Hyson Estate is designated as Strategic Preferred Industrial Land in the New Southwark Plan. It provides spaces for 6 businesses, including the audio visual hire company and printer Push Printing. Other units are occupied by distribution and storage businesses including Timothy Taylor Gallery storage, Transexpress, and Carpetright warehouse.

The corporate event hire company Arnold Walker have recently moved out of the area to settle in Greenford,

KEY

	Manufacture: Other
	Wholesale: Other
	Transport and Storage



Yard space capacity

Car Parking:	1,001 sqm
Yard space (storage):	-
Yard space (industrial servicing):	1,522 sqm
Yard space (retail servicing):	-
Public open space:	-
Private open space:	367 sqm
Vacant :	-

Total yard space: 2,890 sqm
Total operational yard space: 1,522 sqm

KEY

	Car parking
	Operational yard space: servicing (industrial)
	Private open space / deadspace

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3.0

DETAILED BUSINESS
INTERVIEW FINDINGS





SKIP
UNITS

2

TRACKER FITTED
YOU'RE BEING
WATCHED

SKIP
UNITS

L.P.G.
Highly Flammable

2

Souvenir Scenic Studios
© Carmel King

W
02
weight

3.0

DETAILED BUSINESS INTERVIEW FINDINGS

3.1 Business types

Detailed interviews were conducted with 72 businesses in the OKR area. The sample of businesses targeted for interviews were selected as they reflect the sector make up of the OKR area's business base. The greatest proportion of interviews are drawn from the OKR's most prominent activity sectors - transport and storage, retail trade, creative and services sectors. Other key detailed interview groups include businesses working in construction, vehicle related activities and manufacture, particularly of food and beverages. The analysis below is not representative of the full OKR economy, but rather provides particular insights into the operational, staffing and spatial needs of particular businesses, as well as more qualitative information on future growth prospects and the experience of working from the OKR area.

Organisational structure

Across those businesses interviewed, independently-owned businesses are the most common form of organisational structure in the area, followed by businesses that are branches or subsidiaries of larger businesses. Retail, service, manufacturing and food and vehicle related businesses are most strongly represented in the 'independent' business category, while transport and storage, wholesale, utilities and construction businesses appear more likely to be part of wider commercial structures. Across these organisational structures, independent businesses are more likely to have smaller workforces (less than 10 people), while branch or subsidiary locations are more likely to be mid-scale in size (employing between 10 - 49 people). However, OKR is home to a couple of well-established and growing independent businesses that play a significant part in the overall local economy of the area (e.g. Souvenir Scenic Studios, F.E Burman, Constantine).

Ownership

For the first time, demographic data has been collected to better understand the make-up of the OKR business base ownership. Only 11% of interviewed businesses reported to be in majority

female ownership, and of this only two businesses included BME owners. Across all interviewed businesses, white male ownership is by far the most common ownership profile (69% of businesses). Those businesses reporting BME ownership profiles include those working in the retail trade, construction, wholesale sectors and in vehicle sale & repair. Majority female ownership is reported most commonly in design, retail and professional services businesses, and these are most likely to be independent businesses.

Little comparable research has been done on ownership profiles in areas similar to the OKR, UK wide studies estimate that 20% of single-person businesses are owned and run by women and around 18% of SMEs in the UK are majority-led by women¹. Given the prevalence of SME businesses in the OKR area, these figures do provide a degree of benchmarking which suggest that the OKR is behind the national average in terms of diverse business ownership.

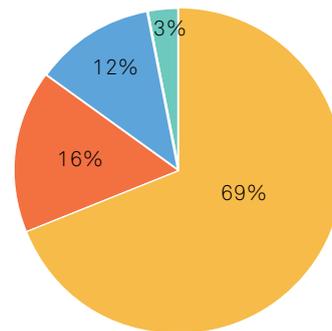


Fig 15 Ownership profiles



1 Department for Business, Innovation and Skills, Small Business Survey, March 2015

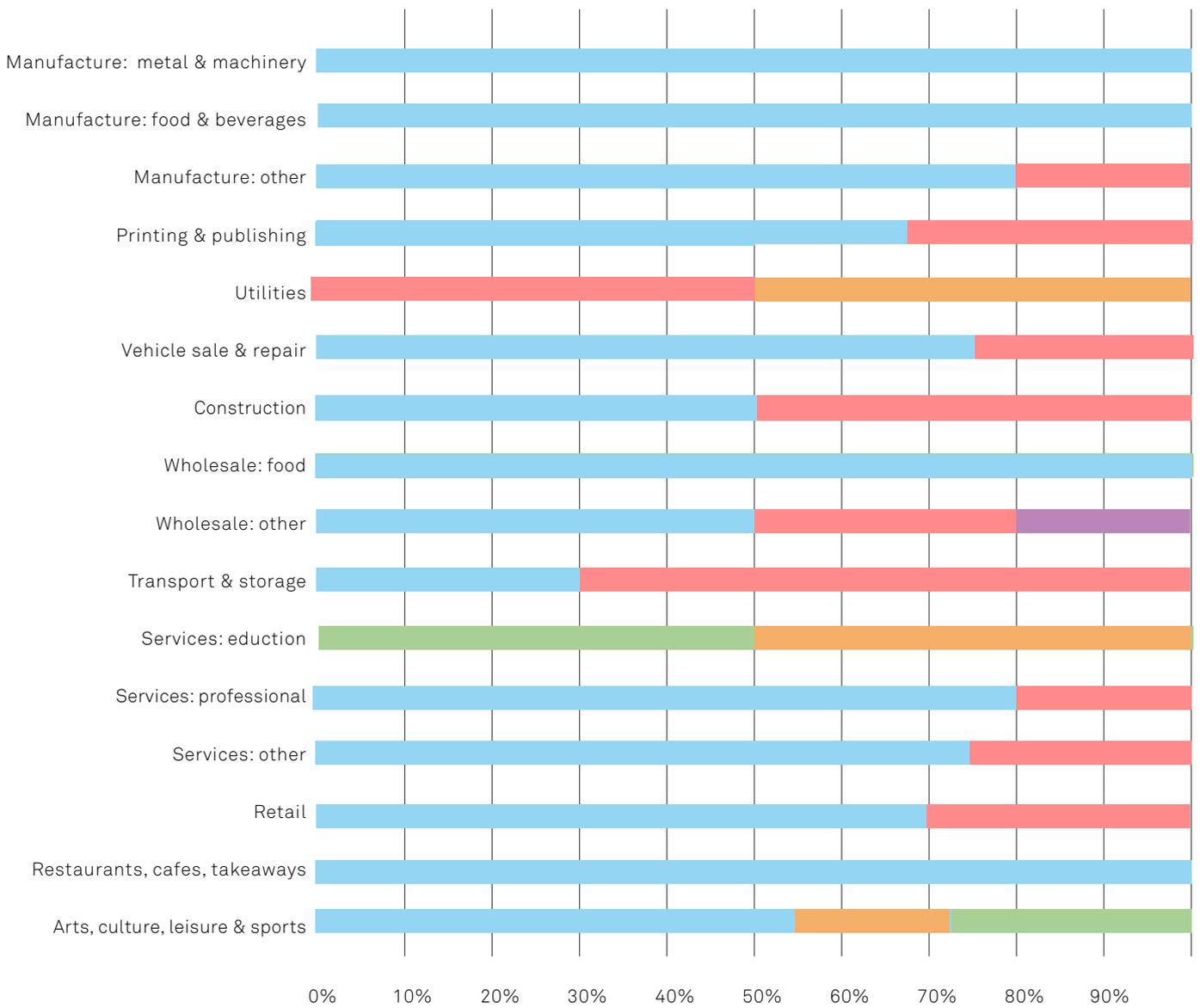


Fig 16 Sector breakdown by organisational type

Key



3.2 Employment & recruiting

Locality of employees

Interviewed businesses report a strong local employment base - with a 56% local workforce reported on average across all sector groups. 'Local' should be understood as Southwark or its two OKR-neighbouring boroughs: Lewisham and Lambeth. The other 44% of employees are based elsewhere within London. Sectors with the highest reported local workforce (80% +) include construction, vehicle sale and repair, manufacture of food and drink as well as retail trade & restaurants. Professional and 'other' services, transport and storage, and arts and culture are the most common business activity reporting less local workforce. These findings highlights that OKR has a large catchment area and offers employment both for local people and beyond the local, suggesting that the economic activities are worse travelling for.

Recruitment

Recruiting experiences vary across businesses, but typically those working in more industrial sectors tend to report more difficulty in finding staff suitable to their businesses. Businesses operating in manufacturing sectors report an equal mix of recruitment ease and difficulties, typically determined by the degree of specialist machinery involved in production processes. Food & drink manufacturing businesses generally report an ease in recruitment in the area, reporting that most unskilled positions are easy to fill and that people move between local businesses. However, some businesses like brewers and caterers, do report difficulties in finding experienced staff members such as a chef or management positions. Metal manufacturers report an overall difficulty in recruiting suitable staff given the skill requirements of the industry. Construction, transport and wholesale businesses report using recruitment services and labour supply businesses, so have little direct experience of recruitment. Overall, service businesses report an ease of finding staff given the OKR's area's proximity to central London, although some do report running graduate and training to meet the needs of their particular businesses. Leisure and food & drink amenity businesses like

restaurants report little difficulties in recruiting suitable staff for their businesses.

Tenure & rent

Leasehold tenure arrangements are the most commonly reported form of tenure. A small proportion (21%) of businesses report owning the freehold of their premises, including printing and publishing businesses and services businesses. There is a little proportion of businesses operating on sub-leases (4%) which reflects the presence of shared workspaces in the area. It is estimated that the proportion of sub-leases recently increase with the increase number of managed and shared workspaces in the OKR area. Businesses operating on sub-lease arrangements include smaller-scale creative and manufacturing activities and design service businesses. Given the high proportion of businesses operating on leaseholds, the nature and length of these arrangements impact the turnover and security of a large proportion of OKR-based businesses. While the vast majority of businesses do not expect to have to leave their workspace over the next 12 months, less than a quarter of respondent businesses reported having a secure freehold. In the context of the AAP and ongoing redevelopment projects, multiple businesses reported an expectation that their landlords would serve them notice to leave in the near future, while expressing frustration that they had no indication of when this would be. It was also reported that shorter and cheaper leaseholds were being offered, or break clauses were proving onerous.

Based on the few businesses across the OKR area who were able to report on their rental levels, businesses are paying between £11 and £19 sq.ft per annum on average.

Servicing & operating hours

Across interviewed businesses, servicing requirements appear to be weighted at two ends: no particular servicing requirements (typically service businesses) and daily servicing requirements (by van or by HGVs). mixing these sectors with other uses.

3.3 Site needs

Servicing & operating hours

Across interviewed businesses, servicing requirements appear to be weighted at two ends: no particular servicing requirements (typically service businesses) and daily servicing requirements (by van or by HGVs). mixing these sectors with other uses. 68% of the businesses surveyed do require some form of servicing provision as part of their core operations. This includes yard space, loading bays and goods lifts. These particular spatial requirements should be considered in tandem with typically reported operating hours and days which highlight that some businesses, such as transport and storage, wholesale or vehicle sale & repair businesses, tend to operate on six days a week, and that some services and leisure uses operate every day of the week. These operational requirements should inform the planning and design solution for mixing these sectors with other uses.

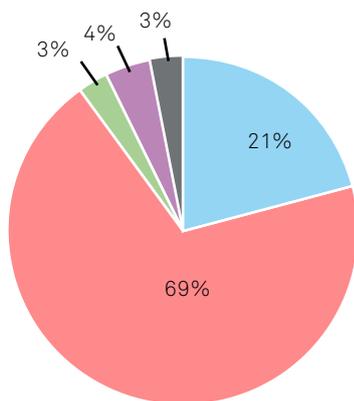


Fig 17 Tenure arrangements

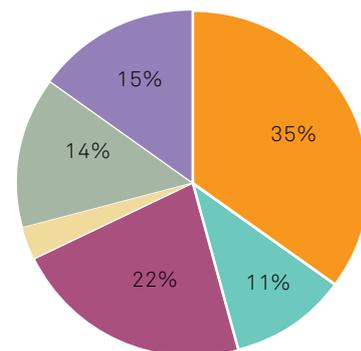
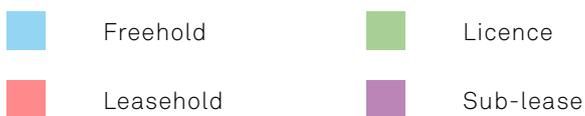
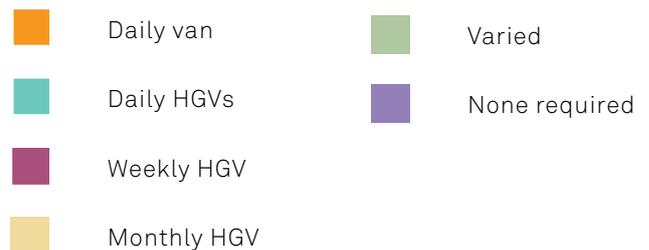


Fig 18 Servicing needs



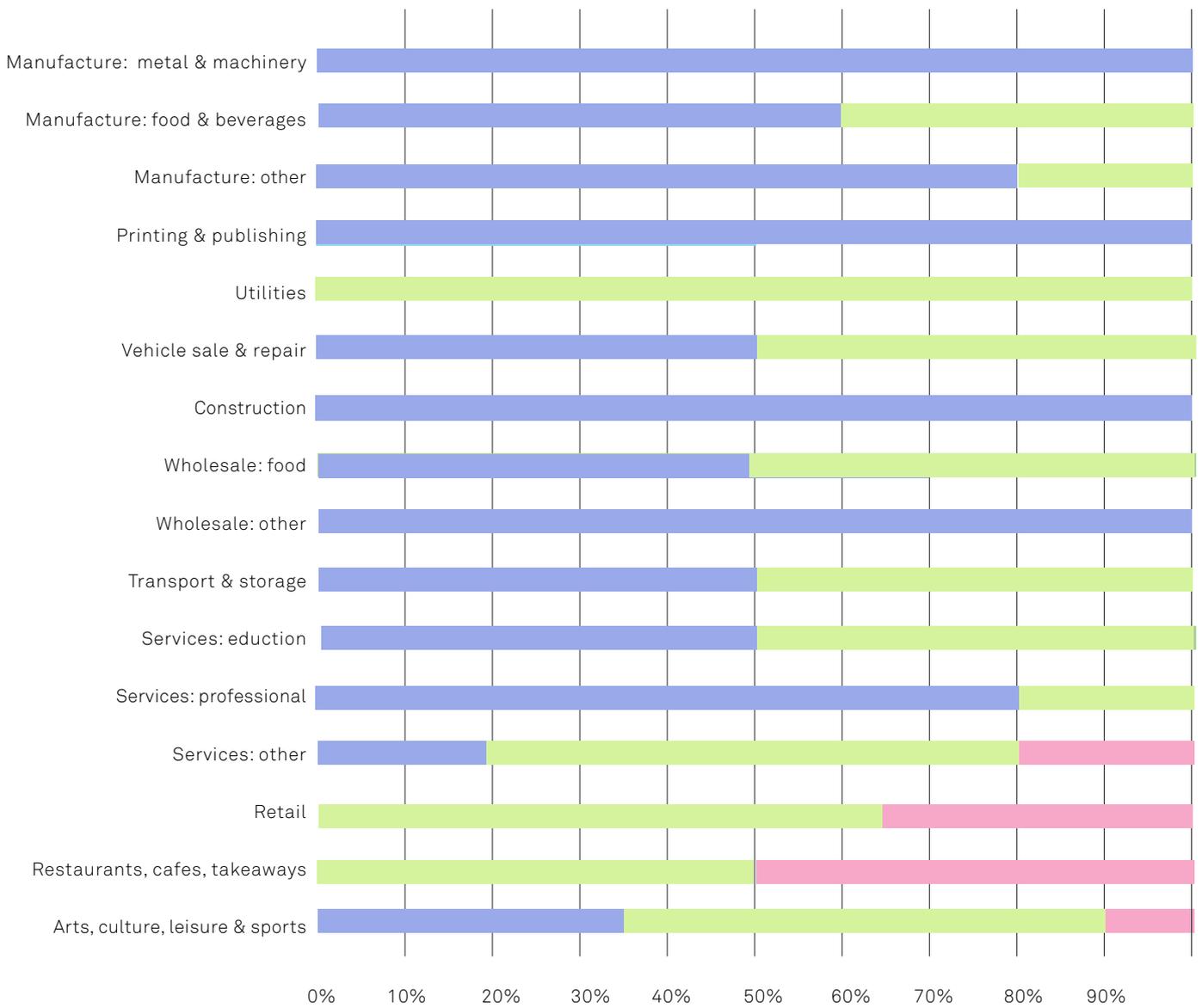
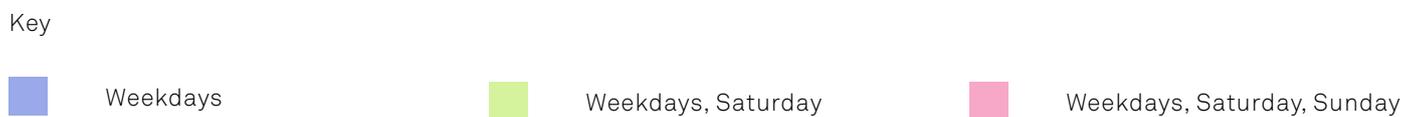


Fig 19 Days of operation across activity sectors



3.4 Geographies of operation

Suppliers & customers

The OKR business base is one that is both served to and is served by London. A high proportion of business suppliers are reported to be based in South London (39%), including a notable proportion in Southwark itself. UK-based and European suppliers play an important role for around a quarter of businesses, but the Greater London area and the South London economy are key supplier and customer locations for most businesses, with more than 70% of businesses reporting that their core client and supplier bases are within the Greater London area. This highlights the OKR's transport links and accessibility to into and across London as a key asset for the majority of its business base.

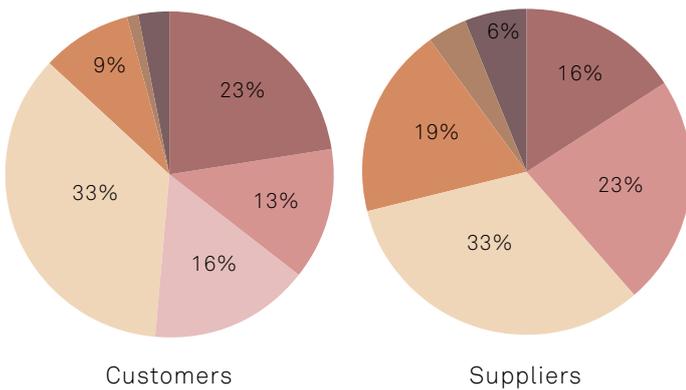
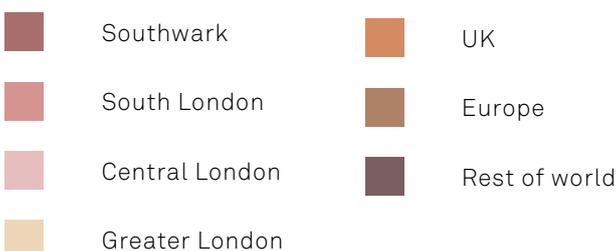


Fig 20 Geography of operation



Local links

Across the OKR area, businesses report a variety of business and community links, from formal supply chains to information sharing and artistic collaborations. Creative businesses reported relying on shared pools of resources and skills. This was particularly apparent around the Hatcham Road and Penarth Street area. Also, multiple artists and creative practitioners (James Capper Sculptor, Tom & Jones, Rebecca Ackroyd) working across areas such as sculpture and video production reported how local supply chains are fundamental to the work they do and their support networks. Examples were given where tools and materials are shared. The survey has also revealed the importance of collaboration and skills-sharing around the theatre industry. Prop and set making businesses are mainly based around the Hatcham Road and Verney Road: proximity and clustering of similar or associated industries has supported project-based collaborations both between tenants and with other local businesses. Creative businesses often see a significant change in their workload and businesses reported using informal networks to bring on extra staff and support. Fears were expressed that as creative and skilled people in different businesses get displaced, this pool of resource will be diminished and networks will not be maintained. Local manufacturers and suppliers were also raised as important neighbours to creative businesses, enabling, for example, small batch production of metalwork or material supplies to be available to them.

Some food businesses report strong identity and branding links to the local area, having started businesses in the area and now focusing distribution of their products to stockists in the local area. Construction businesses report links with local trade counters and other construction supply companies, and vehicle sale & repair businesses report to trade customers in the area and carry out maintenance on the vehicles of neighbouring businesses.

3.5 Anticipated growth

Anticipated staffing & workspace needs

Across the businesses interviewed, the majority of businesses expect business to grow marginally or to remain the same within the next year. Demand for staff within the coming year is the priority for more businesses than the demand for more workspace, with 53% of businesses expecting to need more staff within the coming year, in comparison to only 40% of businesses expecting to need more space. Businesses expecting to need more staff and space within the coming year include those working in food & drink (e.g. breweries, catering businesses), other manufacturing sectors as well as those working in the creative industries (e.g. design, set making, video production) and the distribution sector (shipping activity mainly). It is noted that there is a correlation between newly installed businesses in the OKR area and anticipated growth as most of the businesses interviewed that have moved recently in the area are expecting their needs in term of space and staff to increase.

Only a small number of businesses are expecting their staff and space needs to decrease in the coming year. This is the case for some vehicle sale and repair businesses as well as a few material wholesale businesses.

Of businesses who are expecting their staffing needs to increase in the next year, most are expecting their workspace requirements to increase slightly as well - suggesting that business will need to look for additional space or re-configure existing premises to accommodate more staff. Only a handful of businesses expect their need for space to increase substantially in line with their staffing increase. Some of these businesses report actively looking for more space and a desire to stay in the OKR area, but none have reported securing new workspace in the area.

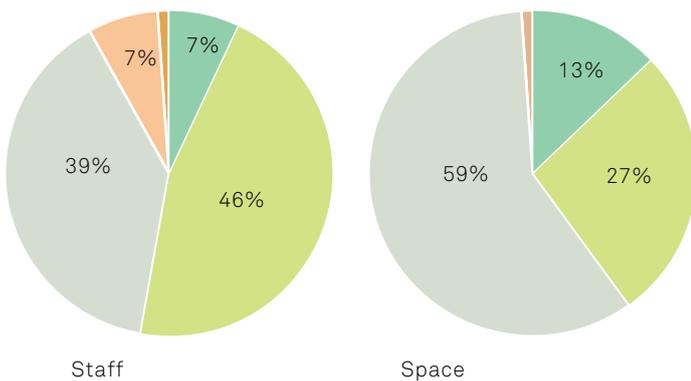


Figure 21 Anticipated growth within the next year

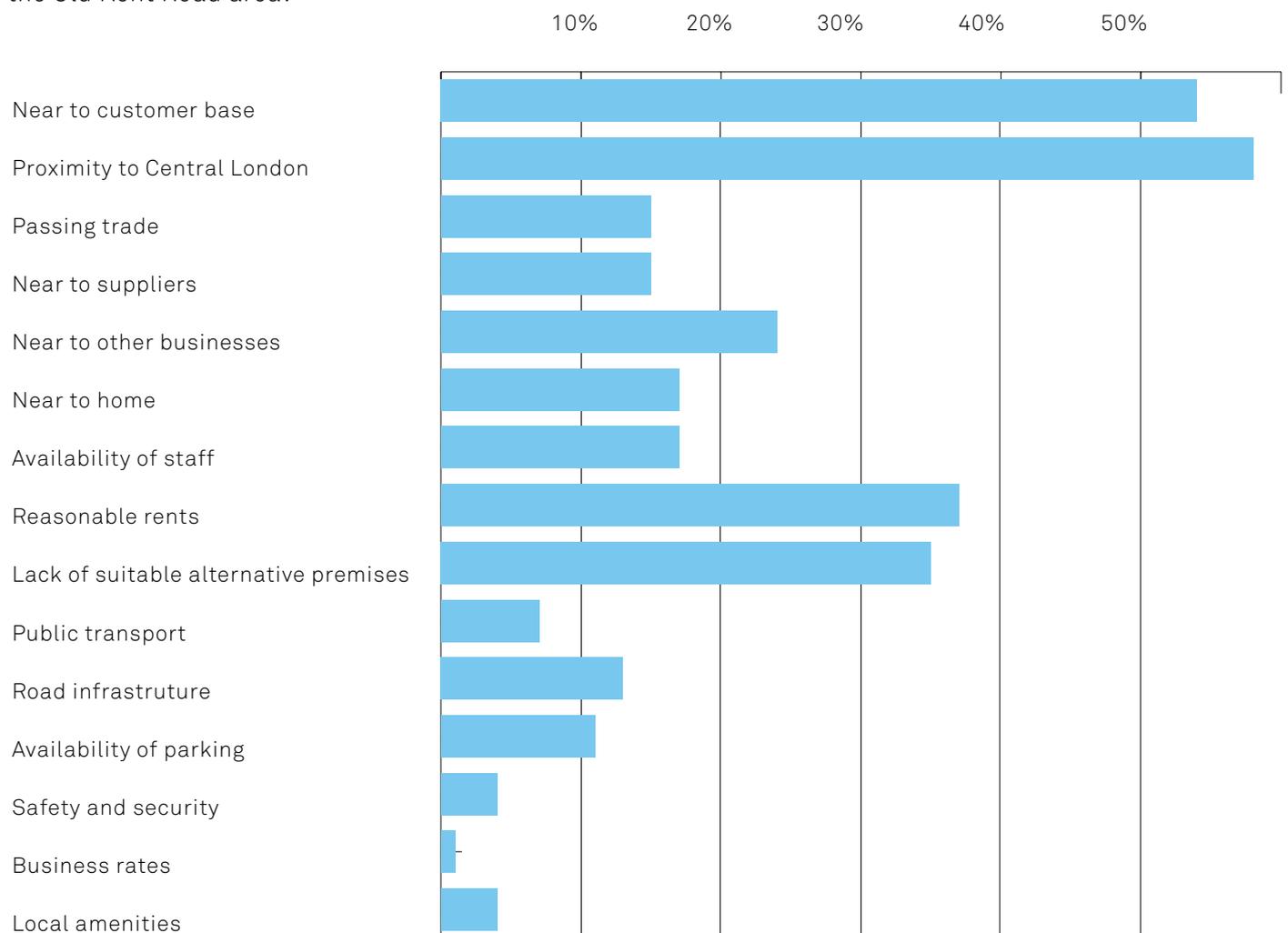
KEY

- Increase substantially
- Increase slightly
- Remain the same
- Decrease substantially
- Decrease slightly

3.6 Views on the OKR area

Businesses report a mix of infrastructural, spatial and geographic qualities when reporting on what drew them to the OKR area. The proximity to transport links, particularly into central London, is commonly cited as a key attraction of the area. Proximity to clients and stockists in central, south and within the Old Kent Road area are all cited as attractive feature of the geography.

Fig 22 What are the main reasons for remaining in the Old Kent Road area?



4.0

EMERGING TRENDS





TO DO 2019
Finish Repairs
Get all dust - walls
Finish floor to Harri
@ Freshcooking
@ get along x1
@ get James
@ Take New Home
@ The Zoo M
@ Fresh in front job

John Hinds Framing
© Carmel King

4.0

EMERGING TRENDS

A growing industrial economy

- If the OKR area have seen its number of businesses drop since 2015, a significant number of industrial businesses have grown (both in term of space and number of employees).
- The total number of jobs in OKR does not seem to have been significantly impacted & the low level of vacancy within available industrial stock continues.
- Key growth sectors includes small-scale manufacturing activities, food and beverage production, cultural production and support services to the creative industry, professional and engineering services. These activity are typically serving London's growing economy and wider growth sector: the food sector, the creative and services sector.

Industrial specialisms

- OKR remains home to some significant manufacturing industries. Particularly of interest and in the context of declining manufacturing in London, are the 23 newly identified manufacturing businesses in 2019.
- These manufacturers have special needs in both skills and access requirements, often reported as key challenges to their business.
- Specialist skills are reported as hard to recruit employees into role.
- Most manufacturing businesses reported needing to work out of industrial/warehouse buildings from the ground floor only. Some reported needing column-free space with 5m high ceilings due to the specialist machinery they use. All reported requiring good street access for vehicles and most saw a need for 24-hour access.
- The presence of large scale service-based industrial activities demonstrate the important of the area providing support services to the central London economy. Presence of companies of national and regional importance, supporting the economy of the capital such as Tate, DPD, TNT and other courier companies as well as public sector institutions (TfL, Met police, Royal Mail). Those businesses have specific needs and particularly in term of servicing and access/yard space.
- Presence of specialist art storage companies as well as creative production businesses (Souvenir, James Glancy, Jayhawk, Make create) that support London's creative economy. Particular cluster of businesses working for the theatre industry.
- Presence of businesses that are not classified as 'creative sector businesses' but which link directly to the creative economy.

Production networks & local supply chain

- As well as creative workspace hosting a diversity of activity within a single workspace site, some creative and productive businesses are benefiting from sharing resources and skills within neighbourhoods.
- This was reported around the Hatcham Road and Penarth Street area in particular.
- Multiple artists and creative practitioners (James Capper Sculptor, Tom & Jones, Rebecca Ackroyd), working across areas such as sculpture and video production, reported how local supply chains are fundamental to the work they do and their support networks. Examples were given where tools and materials are shared.
- Businesses reported using informal networks to bring on extra staff and support. Fears were expressed that as creative and skilled people in different businesses get displaced, this pool of resource will be diminished and networks will not be maintained.
- One creative manufacturer (Studio Makecreate) reported using Instagram as a way to recruit new staff when needed, knowing that it would be seen by neighbours and other businesses in his own network.
- Local manufacturers and suppliers were also raised as important neighbours to creative businesses, enabling, for example, small-batch production of metalwork or material supplies to be available to them.
- In the OKR area, these networks were reported as sometimes being cultivated by multi-occupancy building workspace providers (such as by Artistic Spaces) but also informally across neighbourhoods (Studio Make Create and artists/makers in V22).

Expected changes are impacting future planning

- More than 80% of the surveyed businesses do not expect to leave OKR over the next year.
- However, looking further ahead, multiple businesses spoken to in industrial workspace were resigned to the fact that they would be displaced by development.
- Where reported, more than a third of businesses had heard of the AAP.
- While the vast majority of businesses do not expect to have to leave their workspace over the next 12 months, less than a quarter of respondent businesses reported having a secure freehold.
- Multiple businesses spoken to were not fully aware of the development proposals, or how they would directly affect them. Some thought the loss of their workspace was an inevitability, even when not within a site allocation.
- It was reported than shorter and shorter leaseholds were being offered, or break clauses were proving onerous.
- Short term leases and multi-occupancy buildings were reported as not being suitable for businesses that need bespoke fit-outs or space to adapt and grow.
- Manufacturing businesses reported how relocation would inevitably be significantly disruptive to their business model. The cost of moving heavy and specialised equipment, as well as disruption to their production schedules, were raised as challenges.
- Multiple businesses reported business rates and the resources needed to apply for adjustments/exemptions as being a significant challenge. This, along with the affordability of rent, adds to businesses concerns around their own economic sustainability and ability to stay in the area.

New models of workspace provision

- Models of workspace provision have shifted since 2015.
- Increase presence of recognised affordable and creative workspace providers in the area as well as multiple-occupancy buildings (Penarth Centre, Daisy Business Centre)
- Increase presence of shared workspaces and sub-lease agreements.
- A significant amount of new employment space within recently delivered mixed-use development are vacant.

Table 2 Managed affordable workspaces in the OKR study area

Provider	Site	Status 2015-2019	No. of occupiers
ACME	Pennack Road	Existing	61
Artistic space	3-5 Latona Road	Existing	10
	5-7 Latona Road	Existing	23
	Action House, Sandgate Street	New	67
	Page's Walk	New	10
SET	Alscot Road	Existing	40
Space studios	Haymerle Road	New	95
Capital Studios	Verney Road	New	30
	Hatcham Road	New	45
V22	Ilderton Road	New	156

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Comparison with other industrial locations

In order to understand the composition and strategic role of the study site in relation to London, it is useful to compare Old Kent Road with two other well-known industrial clusters located within the Greater London Area: Surrey Canal Road & New Cross Gate (NXG) and Charlton Riverside (CR). Looking at the composition of New Cross economy is also relevant as the employment area adjoins Old Kent Road AAP, and the Surrey Canal Road and New Cross industrial economy should therefore be understood as a continuity.

The adjoining table provides some comparison between the overall Old Kent Road (OKR) and other industrial areas nearby; Surrey Canal Road/New Cross Gate (NXG) and Charlton Riverside (CR).

In terms of scale, the New Cross economy is made up of 560 businesses accounting for 4,000 jobs and Charlton Riverside hosts 348 businesses, with a total of 5,600 jobs. As detailed on the previous pages, the Old Kent Road area hosts 716 businesses with a total of 10,035 jobs.

The Old Kent Road and Surrey Canal Road/New Cross areas show some similarities in terms of the importance of the service and retail sector, reflecting the presence in both location of high street typologies and uses. The high proportion of employment in retail uses in Charlton Riverside is attributable to the presence of large-scale retail park uses within this area, rather than typical high street retail.

Old Kent Road shows a higher proportion of employment within the Transport and storage sector while the proportion of business within that sector is overall similar as in Surrey Canal Road/New Cross and Charlton Riverside. This reflects the presence of very large employers working in the distribution and storage services such as DPD, Yodel or Royal Mail. Employment within manufacturing sectors is also more important in the Old Kent Road area. However, the proportion of manufacturing businesses is lower than in Surrey Canal Road/New Cross and Charlton reflecting the business composition of the Old Kent Road manufacturing economy, which is mostly made

of a small number of medium-scale businesses. In comparison with Charlton Riverside, Old Kent Road shows a lower proportion of both construction and wholesale,

While the arts, culture and leisure sector have grown in Old Kent Road since 2015, the area shows a lower proportion of them compared to Surrey Canal Road/New Cross and Charlton.

Table 3: Comparison table Old Kent Road / Surrey Canal Road-New Cross Gate / Charlton Riverside

Business activity	Industrial cluster					
	OKR	NXG	CR	OKR	NXG	CR
Number of businesses	716	560	348			
Number of jobs	10,035	4,000	5,600			
	% of total number of businesses			% of total number of employees		
Manufacturing	10%	11%	16%	10%	8%	9%
Utilities	4%	1%	3%	4%	2%	2%
Vehicle sale and repair	4%	5%	13%	2%	3%	5%
Construction	5%	5%	16%	4%	3%	16%
Wholesale	7%	4%	12%	7%	2%	10%
Transport & storage	6%	6%	5%	22%	3%	3%
Services	21%	30%	13%	25%	23%	13%
Retail	16%	13%	13%	12%	10%	24%
Restaurants, cafes, take-aways	11%	18%	3%	5%	7%	4%
Arts and Culture, Leisure & Faith	10%	7%	6%	9%	17%	13%

Sources:

New Cross Gate Masterplan - Employment Study, 2018

Charlton Riverside Employment and Heritage Study, 2017

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