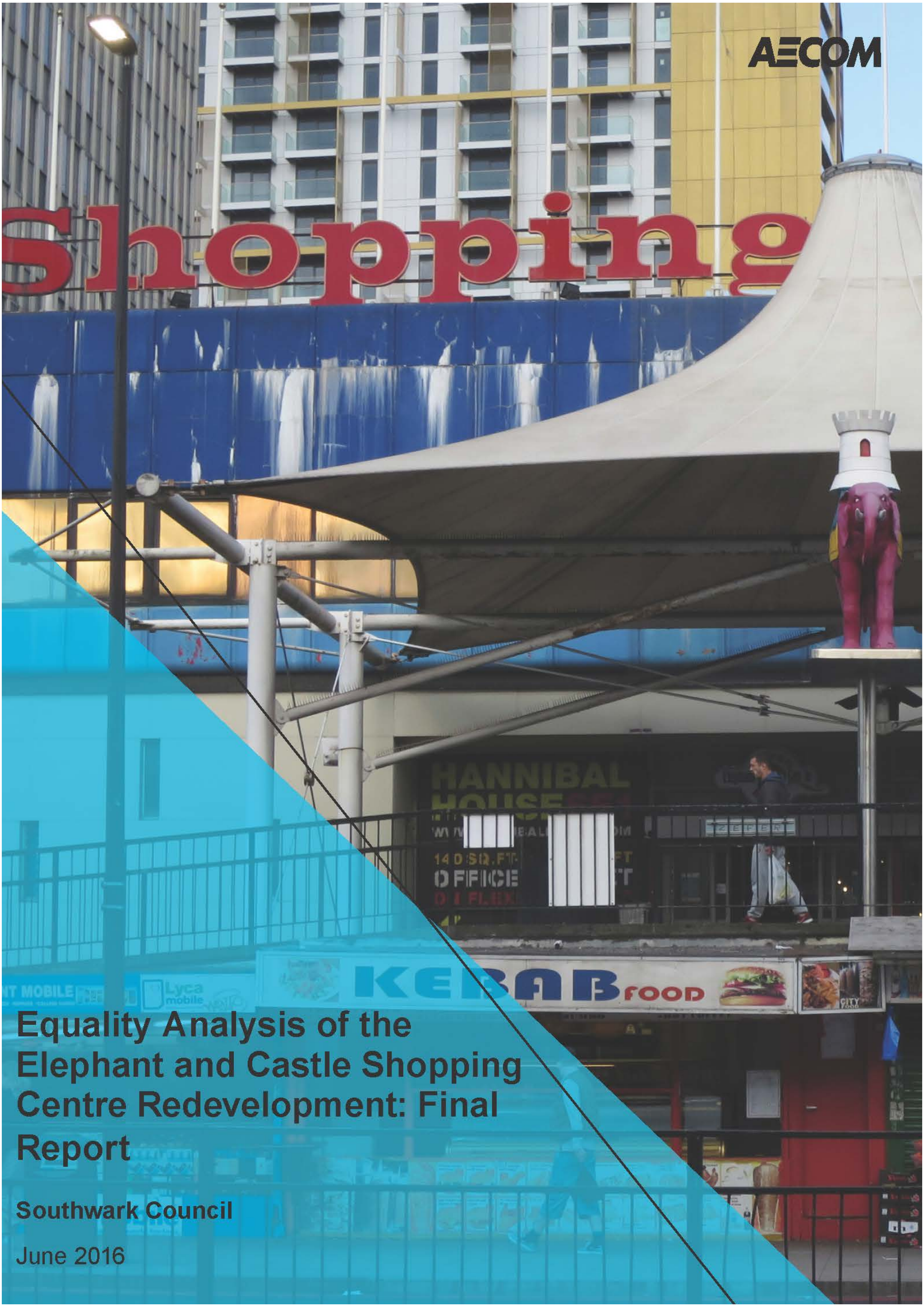

AECOM

Equality Analysis of the Elephant and Castle Shopping Centre Redevelopment: Final Report

Southwark Council

June 2016

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i. Quality information

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1 INTRODUCTION

1.1 Purpose

Southwark Council has commissioned AECOM to undertake an Equality Analysis of the Elephant and Castle Shopping Centre Regeneration Scheme. This Equality Analysis considers how the redevelopment and any associated decision by the Council's cabinet to proceed with a CPO could impact on businesses and communities in the development area. The specific objectives of the Equality Analysis are to:

- Identify any potential negative equality effects that might arise from the use of CPO powers and from the planned development;
- Analyse whether any negative equality effects would give rise to unlawful discrimination for any identified group;
- Identify any further measures to mitigate or avoid any negative equality effects that may arise; and
- Identify potential positive equality effects that could arise through the development.

This process will support Southwark Council to fulfil its Public Sector Equalities Duty[1] in relation to any future decision to exercise CPO powers.

1.2 Background of Elephant and Castle Opportunity Area

The Elephant and Castle, located in the London Borough (LB) of Southwark, has been identified as an Opportunity Area in Southwark Council's Core Strategy[2] and the London Plan[3]. The Greater London Authority has defined Opportunity Areas as "London's major source of brownfield land with significant capacity for new housing, commercial and other development linked to existing or potential improvements to public transport accessibility"[4].

The Elephant and Castle Opportunity Area covers 122 hectares, as outlined in the Elephant and Castle Supplementary Planning Document (SPD), which was subject to equalities impact assessment. This includes the Elephant and Castle Shopping Centre, Elephant Square, Elephant Park, Walworth Road, the Pullens Estate, West Square, St George's Circus, the Enterprise Quarter, and the Newington and Rockingham Estates[5].

The extent of the Opportunity Area is shown in Figure 1.

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[1] Southwark Council is required by UK law to pay due regard to advancing equality, fostering good relations and eliminating discrimination for people sharing certain protected characteristics, as set out in the Public Sector Equalities Duty (2011) (under section 149 of the Equalities Act 2010).

[2] Southwark Council (2011) *Core Strategy* [online] available at: http://www.southwark.gov.uk/downloads/download/2648/documents_for_core_strategy_adoption, accessed November 2015.

[3] Greater London Authority (2011) *The London Plan* [online] available at: http://www.london.gov.uk/priorities/planning/london-plan, accessed November 2015.

[4] Available at: https://www.london.gov.uk/priorities/planning/opportunity

[5] Southwark Council (2012) *Elephant and Castle Supplementary Planning Document* [online] available at: https://www.southwark.gov.uk/downloads/download/2896/elephant_and_castle_spd_supporting_documents

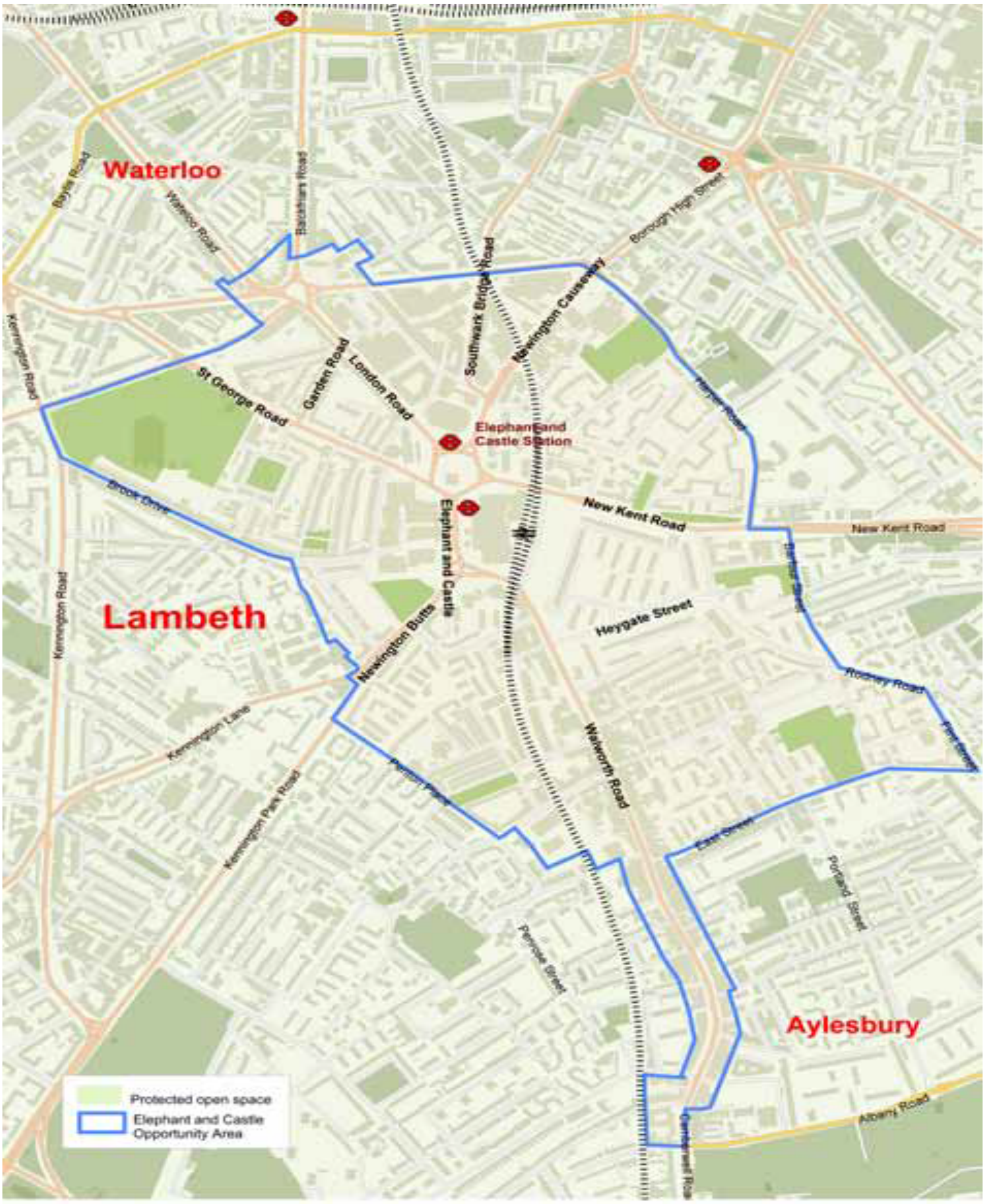

Figure 1: The extent of the Elephant and Castle Opportunity Area[6]

A key part of the regeneration of Elephant and Castle is the shopping centre. This was opened in 1965 and was the first covered shopping mall in Europe. Unfortunately the original design principles have not stood the test of time, and the adopted SPD provides a planning framework for the redevelopment of the site to transform the character of the town centre and improve its appeal as a shopping destination to a wider catchment area.

The overall retail objective for the Elephant and Castle as set out in the SPD is to create a well connected town centre with an improved layout. Local residents will be able to walk easily between the

[6] Southwark Council (2012) *Elephant and Castle Supplementary Planning Document* [online] available at: https://www.southwark.gov.uk/downloads/download/2896/elephant_and_castle_spd_supporting_documents

redeveloped shopping centre site and the Walworth Road with continuous retail lining the high street. The shopping centre site will form the heart of the town centre with most accessibility and highest footfall, connecting directly to the varied offer of the Walworth Road and East Street, creating a vibrant and diverse town centre.

Specific objectives of the redevelopment as set out in the SPD include the creation of a new pedestrian link through the site and beneath the viaduct (to connect to the Elephant Park scheme), strengthening links with Walworth Road, the creation of a new civic space and public transport improvements needed to support growth within the Opportunity Area. Transport improvements include a new northern line ticket hall, and the transformation of the public realm in the town centre to create a new public square. The redevelopment will also facilitate the expansion of the London College of Communication with additional cultural facilities for the area.

The Opportunity Site, which is the focus of this analysis, is comprised of the shopping centre; the office space above the centre in Hannibal House; and 35 market stalls surrounding the centre which are licensed by a private operator. In addition the 15 railway arches to the east of the shopping centre are included within the proposed redevelopment; these are currently home to a range of small independent local businesses (Figure 2).

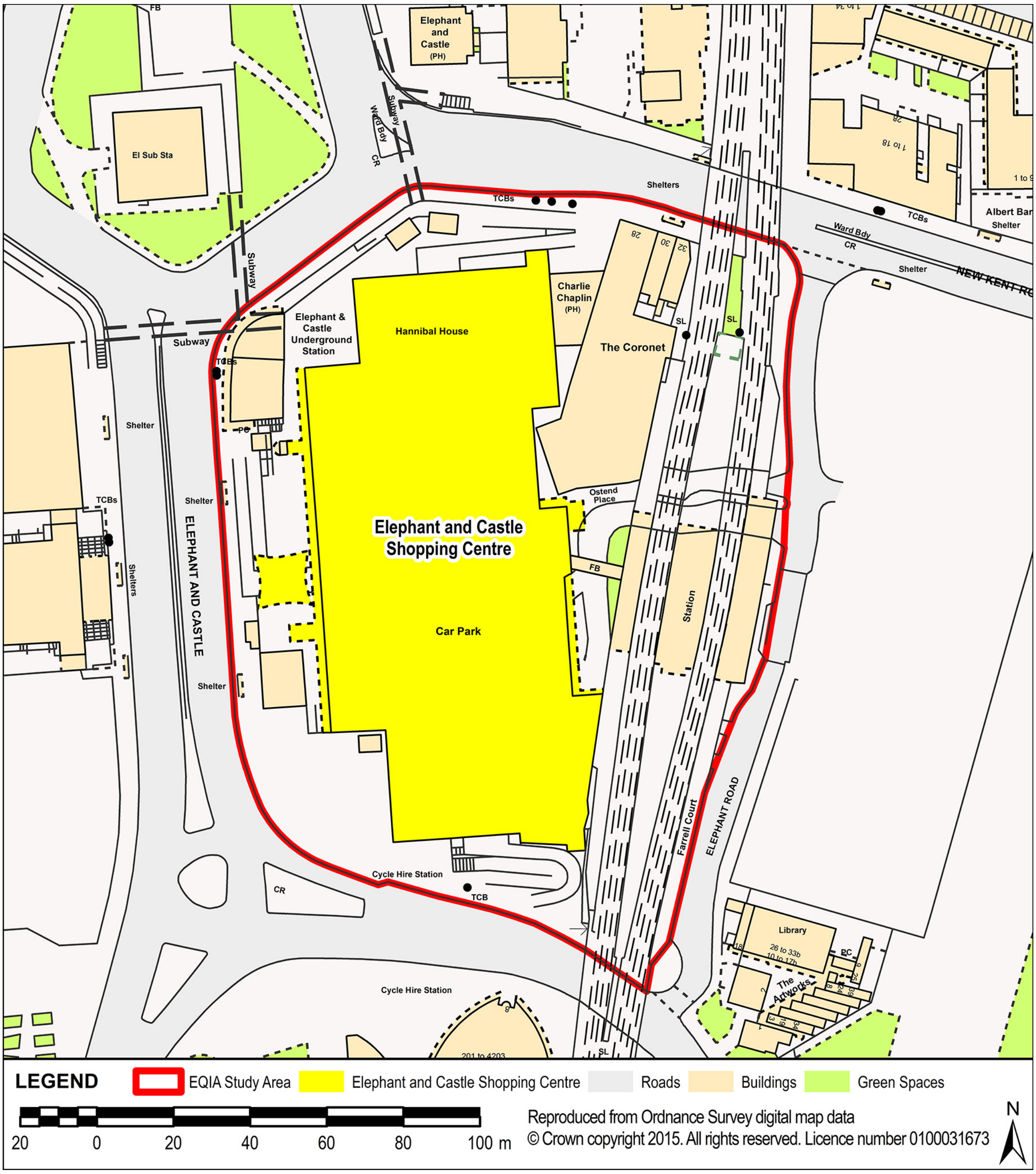

Figure 2: Elephant and Castle Shopping Centre, including 30-32 New Kent Road, Coronet, London Underground station, market stalls and kiosks, Network Rail station and railway arches.

An analysis of the local businesses currently located within the shopping centre indicates a wide range of business types providing both goods and services (Table 1.1).

Table 1.1: Number of businesses located within Elephant & Castle shopping centre, by type

Business type	Number of businesses
Banking	9
Eating and drinking place	9
Miscellaneous (Hair and beauty)	5
General merchandise	5
Apparel and accessories	5
Vacant	5
Eating place	4
Leisure	4
Electronics	4
Miscellaneous (training)	4
Food stores	3
Miscellaneous (gambling)	2
Grocery stores	2
Drug stores	2
Jewellery	2
Shoe store	2
Home furniture	2
Convenience stores	1
Computer and computer software	1
Office	1
Game shop	1
Convenience	1
Miscellaneous (market stalls)	1
Miscellaneous (pawnbrokers)	1
Miscellaneous (charity)	1
Total	77

There are also approximately 15 businesses located within the railway arches, excluding two businesses located in the arches that have access to the shopping centre (included in Table 1.1 above) and two businesses that have access at the railway station. These businesses comprise a mix of business types that provide a range of goods and services (Table 1.2).

Table 1.2: Number of businesses located within the Railway Arches, by type

Business type	Number of businesses
Retail-Auto Dealers & Gasoline Stations	3
Eating and drinking place	3
Miscellaneous (storage)	2
Miscellaneous (nightclub)	2
Retail-General Merchandise Stores	2
Food store	1
Miscellaneous (bike shop)	1
Total	15

In order to deliver the regeneration, Delancey, a national property asset company are currently acting as advisors and developers on behalf of the owners of the shopping centre, will require vacant possession. As a result of the long-standing expectation that the centre will be redeveloped, the majority of the leases can be terminated within the regeneration timescale. However, there are a small number of leases where this is not possible. Therefore a compulsory purchase order (CPO) may need to be made.

Businesses and other stakeholders within this area will be likely to experience significant effects from the redevelopment and the potential implementation of a CPO. However, the effects of the proposed redevelopment and CPO are likely to have wider reaching impacts. The 2015 Southwark retail study[7] notes that the Elephant and Castle is now part of a wider Major Town Centre including most of Walworth Road and the Heygate regeneration area. It is also an important public transport interchange, with connections to the underground, over ground lines, and bus network. As such, employees and customers who will be impacted by the redevelopment may reside, outside the immediate vicinity of the shopping centre. The London Plan states that Major Centres are likely to have borough wide catchment areas. The scope of the assessment therefore accounts for people with protected characteristics across this wider residential, centre user, and transport user catchment area.

The shopping centre and surrounding area is home to a wide range of ethnic minority businesses, and in order for Southwark Council to fulfill its Public Sector Equalities Duty, any impact on these businesses and communities, as well as others sharing protected characteristics[8] must be fully understood before any decision could be taken by the Council's cabinet as to whether a CPO is justified.

1.3 Report Structure

This report is structured as follows:

- Chapter 1: Introduction

[7] Southwark Council (2009) *Retail Capacity Study: main report* [online] available at: http://www.southwark.gov.uk/downloads/download/1672/retail_capacity_study_2009 accessed November 2015

[8] These are the grounds upon which discrimination is unlawful. The characteristics are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. Although the socio-economic duty part of the Equality Act 2010 was not implemented by the government, Southwark Council's approach to equality also considers socioeconomic disadvantage.

- Chapter 2: Methodology
- Chapter 3: Equalities Legislation and Policy Review
- Chapter 4: Description of the Regeneration Scheme
- Chapter 5: Baseline Situation
- Chapter 6: Consultation and Engagement
- Chapter 7: Appraisal of Equality Impacts
- Chapter 8: Recommendations and Conclusions

2 METHODOLOGY

2.1 Introduction

In accordance with the requirements of the Duty, the Equality Analysis was designed to enable consideration of the likely positive and negative equality impact of the redevelopment for affected people sharing protected characteristics identified in the Equality Act 2010. The focus of the analysis is on the effects for businesses currently operating at the shopping centre and surrounding area and associated indirect effects for customers. The analysis also considers effects to people with protected characteristics across this wider residential, centre user, and transport user catchment area.

The methodology for undertaking the Equality Analysis and compiling this report comprised a combination of desk-based research and primary data collection and has involved the following stages:

- scoping;
- design, implementation and analysis of the business and customer surveys;
- appraisal of potential impacts, informed by consideration of survey findings; and
- preparation of recommendations and this report.

The approach draws on guidance for the appraisal of equality impacts produced by the Equality and Human Rights Commission (EHRC)[9], Southwark Council's equality and health analysis guidance and template (2015), as well as AECOM's in-house approach for conducting Equality Analyses / Equality Impact Assessments (EqIAs).

2.2 Scoping

An initial scoping exercise was conducted as the first stage in the Equality Analysis process. This stage involved a desk-based review of relevant equality legislation and policy at a national, London, and local levels. A review of the project history and regeneration objectives in place for the specific site was also undertaken. This was followed by a desk review of relevant equality information through a range of available sources, such as census and other data, on the characteristics of the local community. This has allowed the relevant protected characteristics that should be a focus of the analysis to be determined.

As a result of the desk-based review, an Equality Analysis 'framework' was established that identified potential impacts/key issues and protected characteristics to be considered within the Equality Analysis. Key protected characteristic groups include: age, disability, race, religion and belief, sex, sexual orientation and gender reassignment, and socio-economic disadvantage. Potential effects of the proposed development on pregnancy and maternity have been considered where possible. Marriage and civil partnership has been scoped out of the analysis given that the redevelopment will impact people regardless of their marital status.

Appendix A – Scoping Table summarizes the potential impacts of the redevelopment of the Elephant and Castle Shopping Centre and the associated effects this may have on people with protected characteristics. **Appendix B** - Preliminary Effects Table indicates the potential impacts and issues (identified during scoping) that may arise during and after the redevelopment relative to each protected characteristic group.

It should be noted that the Equality Analysis is the first step in an ongoing equalities assessment process. Further assessment will be carried out at key points in the progression of the planning application and when additional detail about the redevelopment project becomes available..

[9] Equality and Human Rights Commission (2012) The essential guide to the public sector equality duty and Meeting the equality duty in policy and decision-making [online] Available at: http://www.equalityhumanrights.com/advice-andguidance/public-sector-equality-duty/ (Accessed 3/2016)

2.3 Survey design

Two surveys were designed in order to gather the views of those affected by the proposed redevelopment of the Elephant and Castle shopping centre. A survey was prepared for businesses located within the proposed redevelopment area and an on-street survey was prepared for customers. Copies of the business survey can be found in **Appendix C** and the customer survey in **Appendix D**.

The surveys were of a structured design that captured a combination of quantitative and qualitative information. This approach helped to ensure that relevant factual information was collected, whilst also allowing respondents to share their wider views on the proposed redevelopment. Questions were developed that were relevant to the objectives of the Equality Analysis. A series of demographic questions that were developed in line with the 2011 Census were also included, although these questions were asked for qualifying respondents only (see Section 2.5 below for further details).

The implementation of the business and on-street surveys adhered to best practice principles of survey design. This included the avoidance of leading and double-barrelled questions, careful choice of wording (e.g. clear, lay language) and type (e.g. closed, open), the application of logical sequencing and simple layout, and consideration of questionnaire length.

2.4 Conducting the Surveys

The face-to-face surveys were conducted with representatives from businesses within the Shopping Centre, Market areas, Railway Arches and members of the general public who use Elephant and Castle shopping centre. This area was selected as the core fieldwork location as this will be directly affected by the proposed redevelopment. The fieldwork for both sample groups was conducted simultaneously and ran from 4th January 2016 to 9th February 2016 and all interviews were conducted by trained market research interviewers who work directly for AECOM.

In total 502 members of the general public were interviewed. Respondents were stopped at random and asked to participate in the survey, no screening criteria was applied other than the exclusion of all those who stated this was their first ever visit to the Centre. Recruitment focused on key areas in and around Elephant and Castle shopping centre and interviewing took place on the internal floors and the external market areas to ensure that a mix of Centre users were canvassed. All interviewers were given a Letter of Authority (**Appendix E**), which was pre-agreed with Southwark Council, to legitimise their activities and to instil respondent confidence in the purpose and independence of the survey.

An address list for the all of the businesses in the study area (Figure 2) was supplied to AECOM by Southwark council, and all businesses listed were written to in advance of the commencement of fieldwork to advise them of the activity and provide contact information to reassure them of the legitimacy of the work (**Appendix F**). The resulting list consisted of representatives from businesses with units or barrows within the shopping centre, tenants within Hannibal House and market stallholders. Representatives from organisations that reside within the railway arches (tenants of Network Rail) were contacted by post and invited to take part (**Appendix G**). Businesses within the sample were visited on up to three occasions to arrange interviews and appointments were made to complete interviews to maximise participation in the survey. In one case one business owner opted to take part via the telephone- the record of which was made on paper. In total 86 business interviews were conducted across all categories.

All interviews were conducted on paper and subsequently submitted electronically by trained data entry staff using an online survey tool- generating two datasets, one for each part of the study. These data were then checked, cleaned and coded in the case of open-ended responses.

2.5 Limitations and constraints

The survey methodology was designed to enable to capture the views of those people who are most likely to be affected by the regeneration scheme. As such the surveys were targeted at representatives from businesses (owners or managers) and users of businesses located within the Elephant and Castle Opportunity Area. Those who commute via Elephant and Castle underground or rail station were not specifically targeted for inclusion in the on-street surveys, although they were not precluded from participating and a number of commuters passing through the centre participated in the customer surveys (those selecting accessing train station as their main reason for being on site account for fewer than 5% of respondent base).

The fieldwork with businesses was designed to include 85 business organisations from the defined area (including leaseholders within Elephant and Castle Shopping Centre, Hannibal House, the market area and the railway arches). No quotas were applied and there was no requirement to gain a specific number of interviews from each business type. Southwark Council provided a sample file with 117 specified contacts included for all of the relevant business categories (this excluded contact information for 22 market stallholders). There were very few refusals to the survey and no refusals from outdoor market stallholders. - 15 businesses were approached to take part but were not able to take part on that specific occasion due to being too busy or the manager/owner not being available. One interview was conducted by telephone at that leaseholder's request.

Due to the prevalence of national chain stores within Elephant and Castle shopping centre, the decision was taken to only ask those who were business owners/proprietors demographic questions as their responses were more pertinent to the Equality Analysis. There were 40 valid responses to the demographic section.

The public surveys were conducted with members of the general public who were recruited 'on street' for convenience - i.e. stopped and asked to take part while inside Elephant and Castle shopping centre. The bulk of respondents stated that their main purpose for being on site at the point of interview was shopping within the centre or market areas (70% of respondents). No exclusion criteria was applied to the on-street surveys other than the exclusion of respondents who were making their first visit to the Centre (this would make them less familiar with the area and thus less qualified to comment on the proposed redevelopment).

The nature of the business survey and the small total eligible population size mean that results are not intended to be generalised more widely (i.e. outside of the regeneration area) and the responses can be seen as indicative. Similarly, the random nature of the on-street survey sample limits the reliability of responses as it is not weighted nor were quotas applied to be reflective of any population – it is meant to provide an indicative response of general users of Elephant and Castle shopping centre. As a result caution should be taken in interpreting both business and on-street survey data findings, and these cannot be generalised to represent views of the wider population.

All interviewers are trained professional market research interviewers and took care to ensure that respondents understood what they were being asked, without influencing their responses.

3 EQUALITIES LEGISLATION AND POLICY REVIEW

3.1 Introduction

The Equality Act 2010 is a major piece of UK legislation which provides the framework to protect the rights of individuals against unlawful discrimination and to advance equal opportunities for all. Section 149 of the Equality Act sets out the Public Sector Equality Duty (PSED) to which Southwark Council, as a public body, is subject in carrying out all its functions, including in the exercise of its CPO powers.

Those subject to the PSED must, in the exercise of their functions, have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act;
- Advance equality of opportunity between people who share a protected characteristic and those who do not; and
- Foster good relations between people who share a protected characteristic and those who do not.

These are sometimes referred to as the three aims or arms of the PSED. The Act explains that having due regard for advancing equality involves:

- Removing or minimising disadvantages suffered by people due to their protected characteristics;
- Taking steps to meet the needs of people from protected groups where these are different from the needs of other people; and
- Encouraging people from protected groups to participate in public life or in other activities where their participation is disproportionately low.

The Act describes fostering good relations as tackling prejudice and promoting understanding between people from different groups. It states that compliance with the duty may involve treating some people more favourably than others.

The duty covers the following eight protected characteristics: age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

Public authorities also need to have due regard to the need to eliminate unlawful discrimination against someone because of their marriage or civil partnership status. This means that the first arm of the duty applies to this characteristic, but that the other arms (advancing equality and fostering good relations) do not apply.

3.2 Compulsory Purchase Order (CPO)

Compulsory purchase powers are provided to enable acquiring authorities to compulsorily purchase land to carry out a function which Parliament has decided is in the public interest. Anyone who has land acquired is generally entitled to compensation. Local authorities have CPO powers under the Acquisition of Land Act 1981, the Town and Country Planning Act 1990 and other specific Acts of Parliament in order to promote development and regeneration. The CPO process comprises a number of stages, including Resolution, Inquiry, Decision and Compensation stages[10]. The acquiring authority does not have the powers to compulsorily acquire land until the CPO is confirmed by the relevant minister. However, they can acquire by agreement at any time and they should endeavour to do so before acquiring by compulsion.

[10] See DCLG (2004) Compulsory Purchase and Compensation Compulsory Purchase Procedure booklet for a lay explanation of CPO process, one of a series on CPO available at: https://www.gov.uk/government/collections/compulsory-purchase-system-guidance.

3.3 London-wide Policy

3.3.1 London Plan and the Mayors equality strategy

The new London Plan was adopted with amendments in March 2015. The Plan includes strategic and planning policies to encourage equal life chances for all, in recognition of social inequalities existing within the city. The London Plan policies were subject to Equalities Impact Assessment (EqIA) as part of an integrated Impact Assessment (IIA).[11]

A number of policies outlined in the Plan are relevant to the proposed regeneration, including tackling deprivation, promoting equality and enabling different groups to share in the benefits of development, specifically:

- Policy 2.9 Inner London Strategic planning requires that boroughs and other stakeholders should work to realise the potential of inner London in ways that sustain and enhance its recent economic and demographic growth while also improving its distinct environment, neighbourhoods and public realm, supporting and sustaining existing and new communities, addressing its unique concentrations of deprivation, ensuring the availability of appropriate workspaces for the area's changing economy and improving quality of life and health for those living, working, studying or visiting there.
- Policy 3.1 'Ensuring Equal Life Chances for All' requires that development proposals should protect and enhance facilities that meet the needs of particular groups and communities. The plan does not support proposals involving loss of these facilities without adequate justification or provision for replacement.
- Policy 3.2 'Improving Health and Addressing Health Inequalities' is also relevant, requiring due regard to the impact of development proposals on health inequalities in London.
- Policies 3.17 - 3.19 concern the provision of social infrastructure, including health and social care, education, sports and recreation facilities.
- Housing policies 3.3 - 3.16 concerning housing provision, affordable housing provision, mixed and balanced communities, housing choice and provision of associated play facilities, are all relevant to equal opportunities.
- Policy 4.12 Improving Opportunities for all requires that Strategic development proposals should support local employment, skills development and training opportunities. The Plan notes continuing large inequalities in access to jobs and levels of worklessness, with Londoners from Black, Asian and minority ethnic (BME) groups more than twice as likely to be unemployed as those from White groups.
- Policy 7.1 Lifetime Neighbourhoods policy for development which enable people to live healthy active lives, and maximise opportunity for community diversity and inclusion, and design of places that meet the needs of the community at all stages of people lives.

The London Plan 2015 sets out the London wide shopping hierarchy. In terms of this hierarchy Southwark contains one major centre (Peckham) and five district centres, (Lordship Lane, Elephant and Castle, Canada Water, Walworth Road, and Camberwell). The London Plan suggests major centres should have borough wide catchment areas, and are typically smaller than metropolitan centres. These centres may have developed sizeable catchment areas and normally have over 50,000 m2 of retail floor space.

Equal Life Chances for All, the Mayor's equality strategy revised in June 2014, sets out priorities for achieving equality across a range of dimensions. It emphasises enabling the most vulnerable and disadvantaged people to benefit from London's success; supporting deprived communities, vulnerable people and promoting community cohesion; supporting businesses to consider social issues in their corporate planning to bring real change to people's quality of life; increasing the levels of employment

[11] The London Plan IIA documents can be viewed at: https://www.london.gov.uk/priorities/planning/london-plan.

of excluded groups; and decreasing the difference in income between the equality groups and others from deprived communities and the wider community.

3.3.2 *Homes for London: the London Housing strategy*

The London Housing Strategy was formally adopted in October 2014. The Strategy identifies its emphasis as to deliver significant new housing across all tenures to address demand and support London's continued economic growth. Its long-term ambition is to increase supply to 42,000 new homes per annum, of which 17,000 should be affordable (including 5,000 for long-term market rent). The Strategy has a particular focus on low and middle income working households, whilst also addressing the needs of vulnerable and older households.

3.4 **Local Policy**

3.4.1 *Southwark Core Strategy (2011)*

The council's Core Strategy includes planning policies which are relevant to promoting equality and tackling existing disadvantage, including policies on housing and density community facilities and open space. This was subject to a full Equalities Impact Assessment (EqIA) at each key stage of the Core Strategy.[12]

The project area is a focus of numerous sections in the Southwark Core Strategy and it is noted that there are high levels of poverty within the Elephant and Castle area. As such it is the focus of one of a number of regeneration programmes, and has been identified as an opportunity area. The Southwark Core Strategy states that the vision for this opportunity area is to: "facilitate regeneration of the Elephant and Castle into a more desirable place for both existing and new residents" and that it will be "a leading example for sustainable development"[13].

The Southwark Core Strategy incorporates recommendations from the London Plan and sets out a slightly different hierarchy by reclassifying two of the District Centres as a single Major Town Centre due to the potential increase in floor space expected over the next 20 years. The Core Strategy Strategic Policy 3 identifies Elephant and Castle and Walworth Road as a single Major Town Centre. This reflects that potential regeneration will help to consolidate Elephant and Castle and Walworth Road, creating a centre large enough to be classified as a Major Centre.

The Core Strategy Strategic Policy 10 – Jobs and businesses – also includes policies to address the workspace requirements of local businesses. The policy outlines the Council's commitment to ensure that local people and businesses benefit from opportunities which are generated from development and encourages the provision of flexible space to help meet the needs of the local office market and independent retailers. The policy indicates that small and medium sized enterprises (SMEs) make up over 99% of the total number of businesses in Southwark and the protection of small workspace units is required to help ensure a supply of suitable, accessible and affordable premises for SMEs in the borough. This policy applies to both business (B class) units as well as retail (A class) units.

3.4.2 *Draft New Southwark Plan (2015)*

The New Southwark Plan is a borough-wide planning policy document which will guide regeneration and development in Southwark. The plan will set out the Council's regeneration strategy from 2017 to 2033 and will be used to make decisions on planning applications. The plan, which is being developed over a three year period, will replace the Core Strategy (2011) and Southwark Plan (2007) policies.

The New Southwark Plan outlines a number of strategic priorities, including:

- Protecting local businesses and attracting more businesses into the borough to increase job opportunities;
- Supporting local high streets and increasing the variety of shops available;
- Directing growth to certain areas of the borough, including in Elephant and Castle;

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[12] Southwark Council (2010) Core Strategy Equalities Impact Assessment [online] available at: http://www.southwark.gov.uk/downloads/download/2648/documents_for_core_strategy_adoption

[13] Southwark Council (2012) *Adopted Core Strategy* [online] available at: http://www.southwark.gov.uk/downloads/download/2648/documents_for_core_strategy_adoption accessed November 2015

- Introducing policies to improve places by enhancing local distinctiveness and protecting local heritage assets;
- Setting policies to provide more green infrastructure and to promote opportunities for healthy activities;
- Setting policies to support the provision of new homes including 11,000 new Council homes;
- Protecting existing schools and community facilities in the borough and provide more where this is needed.

The Plan sets out a vision for the Elephant and Castle Opportunity Area that includes plans for at least 5,000 new homes (including a wider choice of housing types and sizes); new retail space to create a major shopping destination and flexible business space for small and medium sized businesses (SMEs); improvements to the evening economy and an increased variety of arts, cultural and entertainment activities available; new open spaces and improved connections between them; improvements in the public realm in order to create a more attractive and safe environment; and improved public transport links.

The preparation of the New Southwark Plan has now reached the 'Preferred Option' stage which follows the earlier 'Issues and Options' version of the plan and consultation which concluded in March 2015**.**

3.4.3 Elephant & Castle Opportunity Area Supplementary Planning Document (SPD) (2012)

The Elephant & Castle SPD sets out Southwark Council's vision for the Elephant and Castle Opportunity Area. It is an opportunity area planning framework (OAPF) which will which will guide development over the next 15 years and will be used by the Mayor of London to guide his decisions on planning matters in the area. The SPD replaces the Elephant and Castle Enterprise Quarter SPD (2008).

The Elephant & Castle SPD provides guidance on:

- The infrastructure and funding required to ensure that growth in the area can be accommodated sustainably, including for example, improving social and community infrastructure, upgrading of public transport and public spaces;
- The mix of shops, businesses and other activities such as arts, leisure and cultural provision;
- The amount of new homes that may be built and their location;
- The design and built form of new buildings, including the height, bulk and massing;
- The character of areas and heritage assets;
- Public realm improvements and the creation and enhancement of open spaces and improvements to the connections between them;
- Tree cover and opportunities for new tree planting to reinforce character, help adapt to climate change and provide habitat for wildlife;
- The public transport, walking and cycling network improvements which will be required to accommodate growth and development; and
- Environmental standards which new development will need to meet.

The Council, in line with the Elephant & Castle SPD, plans to renew business space in the area and provide more opportunities for local people and small and medium sized businesses (SMEs). Consideration will be given to identifying sites and developing policies to accommodate a range of employment premises and opportunities of different types, sizes and costs to meet the different needs of the local community. The SPD proposes that all developments of retail space in excess of 1,000sqm should provide a proportion of floor space as affordable business space. According to the SPD, priority for such space will be given to businesses displaced by development in the opportunity area.

3.4.4 Southwark Council's Approach to equality: delivering a fairer future for all (2011)

The Southwark Council's 'approach to equality: delivering a fairer future for all' document sets out Southwark Council's approach to meeting the public sector equality duty (PSED) and explains what people in the borough can expect from the council in terms of the way it plans and delivers its services, and what the council is committed to doing. It also explains the councils approach to advancing equality opportunity in the borough by making equality part of its day-to-day business. In particular, the Council seeks to:

- "Improve the quality of life for Southwark's people through better access to services and creating sustainable mixed communities with opportunities for local people that come from being in the heart of London.
- Improve social cohesion by promoting positive relationships and a sense of community and belonging, by reducing fear and tensions, and encouraging civic responsibility so that the contributions individuals and groups make to their communities are properly valued.
- Promote people's rights and responsibilities. We will do this by ensuring that the council does all it should in providing leadership and by encouraging its partners to do likewise. We will act to protect the rights of those who live in Southwark by ensuring that abuse; mistreatment or discrimination is identified and dealt with.
- Ensuring we have a workforce that understands and is committed to achieving these goals and retains the confidence of our local communities."

4 DESCRIPTION OF REGENERATION SCHEME

4.1 Introduction (site setting and study area)

The centre of the Elephant and Castle Opportunity area was heavily bombed during the Second World War which resulted in redevelopment in the 1960s and 1970s. This period of redevelopment has left a legacy of poorly connected single use structures (such as the shopping centre) and a *"traffic dominated road network that creates an unpleasant environment for pedestrians and cyclists and that disconnects adjoining neighbourhoods".*[14]

The Elephant and Castle Shopping Centre and immediate surroundings comprise of 26,039 m^2 of retail and services floor space. Surrounding the shopping centre, there is a market, which offers a range of products from clothing and electrical items to cosmetics and food retailers.

4.2 Scheme description

It has been a long-standing council policy for the Elephant and Castle area to undergo a comprehensive regeneration to provide a mixed-use sustainable neighbourhood[15]. The Elephant and Castle SPD sets out the council's vision for the Elephant and Castle Opportunity Area to be:

"An attractive central London destination with excellent shopping, leisure facilities and cultural activities based around a highly integrated and efficient public transport hub".

It provides a target for a net gain of 4,000 new homes, including a minimum of 1,400 affordable homes, and 5,000 new jobs over the period 2011-26. The University of Arts London (UAL) is envisioned to develop further as an important centre of learning. The Elephant and Castle Shopping Centre has been identified as an Opportunity Site within this Opportunity Area, where a portion of redevelopment associated with this regeneration can be focused.

At present, the detailed planning proposals for the shopping centre site have yet to be submitted, however stakeholder consultation is currently being carried out ahead of detailed proposals being formulated; and subsequently reported to the Planning Committee to seek appropriate consents.

4.2.1 Retail and Business

Currently there is approximately 26,000m^2 of shopping space in the centre. The proportion of shops that sell comparison goods (music, clothes, books etc.) at Elephant and Castle is very low compared to other UK town centres, and the number of units providing professional services, such as financial services, is high. Around 38% of the retail space in the shopping centre is occupied by independent businesses, with the remaining retail space (62%) occupied by national chain stores. The offices above the Centre (Hannibal House) are occupied by numerous businesses that include: an English language and education centre, and an independent college, as well as registered charities and 3rd sector organisations (Sickle cell and Young stroke survivors, and victim support).[16] The site includes a bingo club, bowling club and music/mixed entertainment venue at the Coronet theatre.

The centre contains several minority ethnic businesses, including Caribbean, African, Asia and Latin-American businesses[17]. London South Bank University and London College of Communication are an important presence in the area and are expected to expand over the plan period.

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[14] Southwark Council (2012) *Elephant and Castle Supplementary Planning Document* [online] available at: https://www.southwark.gov.uk/downloads/download/2896/elephant_and_castle_spd_supporting_documents accessed November 2015

[15] Southwark Council (2015) *Elephant and Castle Place making: The next Steps* [online] available at: http://moderngov.southwark.gov.uk/documents/s57189/Report%20Elephant%20and%20castle.pdf accessed November 2015

[16] Southwark Council (2012) *Elephant and Castle Supplementary Planning Document* [online] available at: https://www.southwark.gov.uk/downloads/download/2896/elephant_and_castle_spd_supporting_documents

[17] Latin Elephant (2015) Elephant and Castle Community Vision [online] available at: http://latinelephant.org/ accessed November 2015

The Southwark Retail Study (2015)[18] states that the total number of vacant units makes up 6.6% of the total unit number. This is less than the national average (9.9%), and a decrease from the 8.7% vacancy rate recorded at the time of the 2009 retail study.[19] This shows that despite uncertainty over the timescales for the regeneration of the Elephant & Castle Shopping Centre, operators have remained here.

The redevelopment currently proposes to replace the existing shopping centre with a new town centre, which includes a three level shopping centre with convenience shops on the ground flood; a mixture of small and large high street shops on the second floor and new restaurant and leisure facilities on the third floor.[20]

4.2.2 Residential uses

Apart from a limited number number of residential units above the shops at 30-32 New Kent Road, there is no residential provision at either the existing shopping centre site or the London College of Communications site.

The current proposals which are available indicate that the developers aim to deliver around 1,000 new homes across the shopping centre site and the existing London College of Communications site, however it is currently unknown what number of new homes from this total number will be delivered within the shopping centre site area.

4.2.3 Leisure and Community Uses

There are currently 9,000m^2 of leisure uses within the 26,000m^2 of the shopping centre. If regeneration proceeds, UAL plan to invest in a new campus for its London College of Communication. As well as providing a new campus, it will also include a new space for the UAL Archive and Special Collections Centre, ensuring the wider community has better access to its selection of archives and collections from film-making, printing history and graphic design.

The additional activity set out above, will place more pressure on transport infrastructure particularly at the Northern Line Underground Station. This has been recognised from the time the Elephant and Castle was designated a regeneration area and the developers, as part of their proposal, will incorporate an updated underground station in the overall scheme that will make access and egress to platforms faster. The proposals will also link the new centre to the Elephant and Castle mainline station more coherently than is currently the case.[21]

[18] Southwark Council (2015) Retail Study Final Report [online] available at: http://www.southwark.gov.uk/downloads/download/4304/southwark_retail_study_2015 accessed December 2015

[19] Southwark Council (2009) *Retail Capacity Study: main report* [online] available at: http://www.southwark.gov.uk/downloads/download/1672/retail_capacity_study_2009 accessed November 2015

[20] Elephant and Castle Town Regeneration (2015) *Exhibition Boards* [online] available at: http://elephantandcastletowncentre.co.uk/exhibition.htm

[21] Southwark Council (2015) *Elephant and Castle Place making: The next Steps* [online] available at: http://moderngov.southwark.gov.uk/documents/s57189/Report%20Elephant%20and%20castle.pdf accessed November 2015

5 BASELINE SITUATION

In order to consider the potential impact of the proposed redevelopment on key protected characteristics, it is important to understand the demographic context of the area.

While the Elephant and Castle Shopping Centre is located within Cathedrals Ward, additional Wards within the Elephant and Castle Opportunity Area have been considered, as Elephant and Castle Shopping Centre's influence as a major centre is likely to extend beyond the boundaries of the Ward it is situated in (Figure 3).

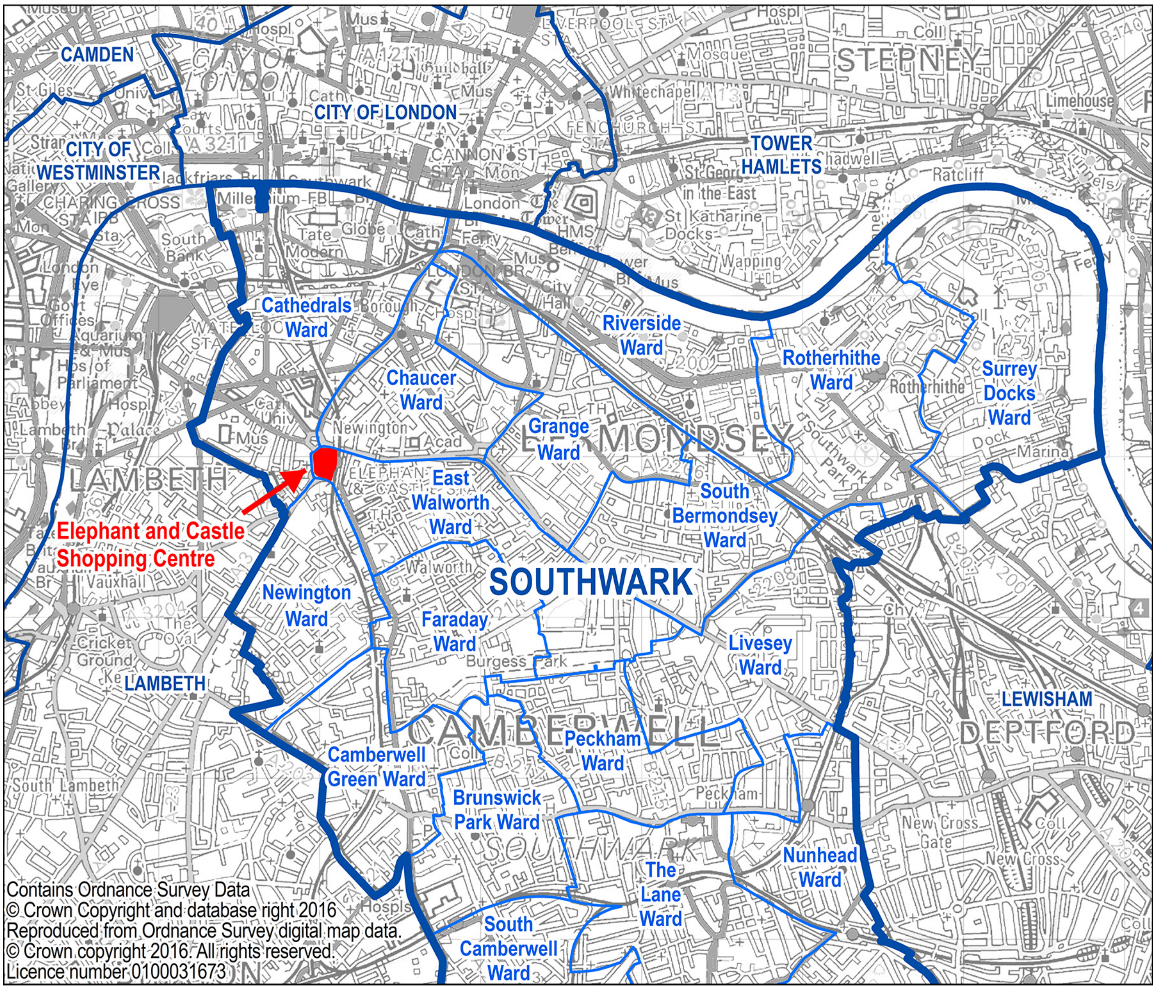

Figure 3: The location of the Elephant & Castle Shopping Centre within LB Southwark and at ward level

This section provides baseline information drawing on a range of data sources, including the 2011 Census. Data is presented at a Greater London, LB Southwark, and Ward level (Cathedrals Ward, East Walworth Ward, Faraday Ward, Newington Ward, Chaucer Ward, and Camberwell Green Ward) where available.

5.1 Age

As outlined in **Table 5.1**, Chaucer Ward (15.6%) and Newington Ward (17.5%) within the Elephant and Castle Opportunity Area have a slightly lower proportion of residents in the 0-15 age group, and Cathedrals Ward has a considerably lower proportion of residents (11%), compared with the LB Southwark (18.6%) and Greater London (20.3%) averages. East Walworth, Camberwell Green, and Faraday Wards (19.4%, 21.2%, and 23.8% respectively) are somewhat higher than the LB Southwark average; however the proportion of 0-15 year olds within Camberwell Green and Faraday Wards is lower than within London as a whole.

All wards within the Opportunity Area have more residents of working age (16-64 years old) when compared to London levels (68.2%). While East Walworth, Camberwell Green, and Faraday Wards have lower proportions of working age residents than the LB Southwark average (73.5%), Newington Ward is somewhat higher, and Cathedrals and Chaucer Wards have a considerably higher proportion of working age residents than the LB Southwark.

The proportions of people aged over 65 years are broadly similar at a Ward and LB Southwark level; and slightly lower than proportions within London as a whole (11.5%). The exception is Chaucer Ward (5.5%), which has a notably lower proportion of people aged 65 and over when compared with London.

Table 5.1: Age breakdown by different geographical areas

Age (years)	Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Southwark	London
0-15	11%	19.4%	21.2%	15.6%	23.8%	17.5%	18.6%	20.3%
16-64	81.8%	71.8%	70.7%	78.9%	68.8%	74.3%	73.5%	68.2%
65 and over	7.2%	8.7%	8.1%	5.5%	7.4%	8.2%	7.9%	11.5%

Source: ONS, Mid-Year Population Projections 2014 (November 2015)22

GLA Population Projections estimate that by 2031, the proportion of 0-15 year olds living in the Borough will increase by approximately 9.5% on 2016 levels. The working age population of 16-64 year olds will experience a similar rate of population increase over the same time period, at 10.5%. The greatest population increase is expected in the over 65 years age group, which will increase considerably on 2016 levels, to 32.7%[23].

5.2 Disability

With the exception of Cathedrals (6.7%) and Chaucer (5.6%) Wards, all wards have a higher proportion of residents who consider that their day-to-day activities are ‘limited a lot’ by disability or illness when compared with the LB Southwark (7.7%) and London (8.1%) but overall the affected wards are very close to the Southwark average. The proportion of residents within the Wards in the Opportunity Area whose activities are ‘not limited’ by a disability or illness are broadly in line with the proportion in LB Southwark (84.3%) and London (83.2%); the exception being Chaucer Ward which is slightly higher (88.4%). The proportion of people who are ‘limited a little’ by a disability or illness varies across the Wards within the Opportunity Area, however Chaucer Ward (6%) is somewhat lower than the other Wards, LB Southwark (8%), and London levels (8.8%) (Shown in **Table 5.2**).

Table 5.2: Limiting long-term illness or disability by different geographical areas

	Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Six ward mean	Southwark	London
Day-to-day activities limited a lot	6.7%	9.1%	8.9%	5.6%	8.2%	8.5%	7.8%	7.7%	8.1%
Day-to-day activities limited a little	7.5%	8.6%	8.7%	6%	9.4%	9%	8.2%	8%	8.8%

[22] ONS Mid-year population projections 2014, (2015); http://data.london.gov.uk/dataset/ons-mid-year-population-estimates-custom-age-tables

[23] GLA Round Population Projections 2011 (2014 release) http://data.london.gov.uk/dataset/2011-round-population-projections

	Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Six ward mean	Southwark	London
Day-to-day activities not limited	85.8%	82.3%	82.3%	88.4%	82.4%	82.6%	84%	84.3%	83.2%

Source: ONS, DC3602EW - Long-term health problem or disability by NS-SeC by sex by age, (2013)

Data collected by Transport for London (TfL) suggests that around 12.4% of the population of London currently experiences reduced mobility, including 1.2% of residents who are wheelchair users and 4.4% who have difficulty walking. These figures vary significantly by age group: only 0.3% of people aged under 25 years old have walking difficulties, compared with 17.5% of those aged 60 years and over. TfL estimates that approximately 29.6% of people in London over the age of 60 experience reduced mobility in some way[24].

5.3 Sex

The majority of Wards within the Elephant and Castle Opportunity area have similar proportions of males and females to the LB Southwark and London averages; with an approximately even split. Newington is the only Ward which has a slightly higher proportion of males (51%) whereas all other wards have a higher proportion of females. See **Table 5.3** for details.

Table 5.3: Population breakdown by sex and geographical area

Sex	Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Southwark	London
Male	49.7%	48.6%	49.1%	48.4%	49.4%	51%	49.6%	49.6%
Female	50.3%	51.4%	50.9%	51.6%	50.6%	49%	50.4%	50.4%

Source: ONS, Mid-Year Population Projections 2014 (November 2015)[25]

5.4 Sexual Orientation and Gender Reassignment

The ONS Integrated Household Survey (IHS) recently introduced questions on sexual orientation[26]. Data from the 2014 survey indicates that 1.1% of UK residents identified themselves as Gay or Lesbian; 0.5% as Bisexual; 98.1% as Heterosexual or straight; and 0.3% as an ‘other’ sexual identity.

London as a region has the largest proportion of adults identifying as Lesbian, Gay, or Bisexual (LGB), at 2.6% (with other regions in the UK ranging from 1.0% in the East Midlands to 1.8% in the South East). Estimates relating to numbers of people identifying with a specific sexual orientation are not available at borough level or below, due to the small sample size of this dataset[27].

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[24] Transport for London , (2010); *Londoners With Reduced Mobility*

[25] ONS Mid-year population projections 2014, (2015); http://data.london.gov.uk/dataset/ons-mid-year-population-estimates-custom-age-tables

[26] ONS, (2015); Integrated Household Survey, January to December 2014: Experimental Statistics [online] available at: http://webarchive.nationalarchives.gov.uk/20160105160709/http://www.ons.gov.uk/ons/dcp171778_418136.pdf, accessed March 2016

[27] ONS, (2015); Integrated Household Survey, January to December 2014: Experimental Statistics [online] available at: http://webarchive.nationalarchives.gov.uk/20160105160709/http://www.ons.gov.uk/ons/dcp171778_418136.pdf, accessed March 2016

5.5 Race

As outlined in **Table 5.4**, with the exception of Cathedrals Ward, all Wards within the Opportunity Area have a lower proportion of White residents, and correspondingly a higher proportion of Black and Minority Ethnic (BAME) residents than the LB Southwark or London averages.

Chaucer Ward has almost twice as many Asian residents (17.2%) than the other Wards in the Opportunity Area and the LB Southwark (9.4%); however the proportion remains lower than the London average (18.5%). The proportions of people belonging to Mixed Ethnic groups within all Wards is in line with the LB Southwark (6.2%), however slightly higher than the London (5.0%) average.

Within the Camberwell Green and Faraday Wards, there are considerably higher proportions of Black people (42.4% and 40.3% respectively) than the other Wards, LB Southwark (26.9%) and London (13.3%) levels. By contrast, Cathedrals Ward has a somewhat lower proportion of Black people (16.0%) than the in the other Wards in the Opportunity Area.

With the exception of Cathedrals Ward (2.7%), all other Wards in the Opportunity Area have a higher total proportion of Other Ethnic groups than both the LB Southwark (3.2%), and London (3.4%).

Table 5.4: Ethnic groups by different geographical areas

Ethnic group		Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Southwark	London
White	British	44.3%	33.1%	26.7%	33.6%	26.4%	35.7%	39.7%	44.9%
	Irish	2.7%	2.2%	1.8%	2.6%	1.8%	2.5%	2.2%	2.2%
	Gypsy or Traveller	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
	Other	14.5%	12.8%	10.3%	13.8%	11.0%	13.5%	12.3%	12.6%
Mixed/ Multiple Ethnic Groups	White/ Black Caribbean	1.6%	2.4%	2.2%	1.5%	2.4%	1.9%	2.0%	1.5%
	White and Black African	1.1%	1.1%	1.5%	1.0%	1.3%	1.5%	1.3%	0.8%
	White and Asian	1.0%	1.1%	0.7%	1.3%	0.5%	0.9%	1.0%	1.2%
	Other	2.0%	2.1%	1.9%	2.0%	2.2%	2.3%	1.9%	1.5%
Asian/ Asian British	Indian	3.3%	1.3%	1.2%	4.5%	0.6%	1.2%	2.0%	6.6%
	Pakistani	0.9%	0.4%	0.3%	0.9%	0.4%	0.4%	0.6%	2.7%
	Bangladeshi	2.8%	2.6%	1.5%	4.0%	2.8%	2.0%	1.4%	2.7%
	Chinese	4.2%	3.1%	2.0%	3.6%	2.7%	3.2%	2.8%	1.5%
	Other	3.0%	2.9%	3.0%	4.2%	3.1%	2.2%	2.7%	4.9%
Black/ African/ Caribbean / Black British	African	10.2%	19.9%	28.1%	15.9%	28.2%	19.0%	16.4%	7.0%
	Caribbean	3.0%	5.4%	8.7%	3.6%	5.8%	5.4%	6.2%	4.2%
	Other Black	2.7%	5.2%	5.5%	3.5%	6.3%	4.3%	4.2%	2.1%

Ethnic group		Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Southwark	London
Other Ethnic Group	Arab	1.2%	1.0%	0.9%	1.4%	0.8%	1.2%	0.8%	1.3%
	Other	1.5%	3.4%	3.4%	2.6%	3.5%	2.9%	2.4%	2.1%

Source: ONS DC2101EW - Ethnic group by sex by age, Census 2011, (2014)

5.6 Religion or belief

The percentage of the population at Ward level who identify as Christian, is broadly comparable to that of Southwark (52.2%) and typically higher than the proportion of Christians in London (48.4%), aside from Cathedrals (46.3%) and Chaucer (46.5%) Wards which are slightly lower.

Within all Wards in the Opportunity Area, Buddhism is slightly more represented than the London average (1%), while Hinduism and Sikhism are significantly less represented than London average (5% and 1.5% respectively). The proportion of Jewish residents within all Wards and in the LB Southwark (0.3%) is broadly similar; considerably lower than the London average (1.8%). The proportion of residents who follow 'Other' religions is similar in all Wards, the LB Southwark, and London (at approximately 0.5%). See **Table 5.5** for further details.

Table 5.5: Religion or belief by different geographical areas

Religion	Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Southwark	London
Christian	46.3%	53.1%	57.0%	46.5%	57.0%	52.5%	52.5%	48.4%
Buddhist	1.1%	1.8%	1.4%	1.5%	1.7%	1.5%	1.3%	1.0%
Hindu	1.9%	0.8%	0.6%	3.0%	0.4%	0.8%	1.3%	5.0%
Jewish	0.5%	0.1%	0.2%	0.6%	0.2%	0.2%	0.3%	1.8%
Muslim	8.9%	11.9%	11.2%	12.3%	13.6%	10.6%	8.5%	12.4%
Sikh	0.5%	0.1%	0.1%	0.4%	0.1%	0.2%	0.2%	1.5%
Other religion	0.5%	0.5%	0.4%	0.5%	0.6%	0.4%	0.5%	0.6%
No religion	31.9%	23.5%	20.5%	27.0%	18.1%	25.3%	26.7%	20.7%
Religion not stated	8.3%	8.2%	8.6%	8.4%	8.4%	8.6%	8.5%	8.5%

Source: ONS, Mid-Year Population Projections 2014 (November 2015)

5.7 Socio-economic status

Socio-economic status considers an individual's or family's economic and social position in relation to others, based on several factors including levels of deprivation, employment, education, health / health inequality, and housing. Additional baseline information relevant to this analysis has been provided in this section, and includes data on: access to services and facilities; public realm and open space; transport and connectivity; safety, security and well-being; and community cohesion.

5.7.1 Deprivation

According to the Index of Multiple Deprivation 2015, LB Southwark is the 41st most deprived borough out of the 326 local authorities in England. The borough is also ranked as the 8th most deprived of the 33 London boroughs[28].

The Index of Multiple Deprivation 2015 revealed that Wards within the Elephant and Castle Opportunity Area fall within the top 20% and 30% most deprived wards in England[29]. Other parts of the Borough experience more severe deprivation however, and fall within the top 10% most deprived in England.

The LB Southwark ranks 7th highest of the 33 London boroughs for the Health, deprivation, disability domain, 9th highest for the Income deprivation domain, and 17th highest for the Education, Skills, and Training domain.

5.7.2 Employment

In the first quarter of 2015, 5.62 million people were employed in the Greater London area. The number is forecast to increase modestly to 5.74 million by 2016. LB Southwark has a core business district within and surrounding the Elephant and Castle Opportunity Area, and to the north of the Borough along the River Thames. The Opportunity Area has a predominance of office and small business uses..

Table 5.6 presents a detailed breakdown of employment sectors by geographical area. The sectors that employ the highest proportions of people within the LB Southwark are: Professional, scientific and technical activities (20.8%); Administrative and support services (11.5%); and Human health and social work activities (11.1%), with low levels of employment in sectors such as: construction (1.8%); and manufacturing (0.9%)[30]. This is reflected in the educational attainment of LB Southwark residents, with 43.1% having degree level qualifications or above, as outlined in Section 5.7.3 below.

At a ward level, employment by sector differs considerably. Within the Opportunity Area, the most common employment sectors are: Administrative and support services; Human health and social work activities; Education; and Arts, entertainment and recreation. There are also high concentrations of employment by sector in certain wards, with 23.8% people in East Walworth and 23.2% people in Faraday ward employed in the Wholesale and retail trade, and 27.5% people in Camberwell Green employed in Transportation and storage. The variation in employment sectors, and higher prevalence of people employed in sectors which require lower levels of qualifications, may reflect the lower levels of educational attainment in some Wards. High levels of employment in sectors such as wholesale and retail may also indicate a considerable demand for these types of services in certain locations.

Table 5.6: Employee Jobs by Broad Sector Group across different geographical areas

	Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Southwark	London
Agriculture, forestry and fishing	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%
Mining and quarrying	0.6%	0.3%	0.0%	0.0%	0.5%	0.2%	0.3%	0.6%
Manufacturing	0.5%	1.1%	1.5%	0.5%	2.3%	0.7%	0.9%	2.4%
Electricity, gas, steam and air conditioning supply	1.9%	1.8%	1.6%	1.5%	1.5%	1.5%	2.2%	3.1%
Water supply; sewerage, waste	0.0%	1.1%	0.4%	0.0%	3.4%	0.2%	0.2%	0.8%

[28] London Borough of Southwark, (2015); JSNA Statistics.

[29] Department for Communities and Local Government, (2016); IMD Explorer. Available at: http://dclgapps.communities.gov.uk/imd/idmap.html, accessed March 2016.

[30] ONS, (2015); Business Register and Employment Survey (BRES)

	Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Southwark	London
management and remediation								
Construction	0.8%	6.1%	1.2%	0.8%	1.1%	0.2%	1.8%	3.2%
Wholesale and retail trade; repair of motor vehicles	1.4%	23.8%	9.3%	2.9%	23.2%	4.7%	4.8%	8.6%
Transportation and storage	7.1%	0.8%	27.5%	0.4%	0.2%	1.8%	5.1%	4.8%
Accommodation and food service activities	6.0%	10.4%	10.0%	4.2%	3.0%	2.4%	6.0%	7.6%
Information and communication	17.3%	1.3%	1.1%	2.8%	3.6%	2.2%	9.5%	7.9%
Financial and insurance activities	7.0%	1.9%	1.4%	0.5%	1.5%	0.8%	3.5%	7.4%
Real estate activities	2.2%	2.3%	1.0%	1.8%	6.0%	1.1%	2.3%	2.3%
Professional, scientific and technical activities	18.3%	2.5%	3.1%	13.4%	2.5%	4.0%	20.8%	13.0%
Administrative and support services	14.0%	9.6%	12.0%	22.7%	7.5%	9.7%	11.5%	10.4%
Public administration and defence	4.7%	0.0%	2.5%	6.1%	0.0%	60.7%	6.5%	4.6%
Education	5.4%	21.2%	12.4%	4.9%	12.4%	2.3%	8.1%	8.1%
Human health and social work activities	5.7%	7.2%	7.2%	31.7%	24.8%	5.0%	11.1%	10.2%
Arts, entertainment and recreation	6.9%	8.6%	7.9%	5.8%	6.2%	2.2%	5.4%	5.1%
Other service activities	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%

Source: ONS, (2015); Business Register and Employment Survey (BRES)

5.7.3 Education

Of the six Wards within the Opportunity Area, Cathedrals, Chaucer, and Newington have a higher proportion of residents who have attained NVQ Level 4 (degree level) or above than the LB Southwark average (43.1%). Degree level attainment in the LB Southwark is somewhat higher than the London average (37.7%).

The proportion of residents with no qualifications is higher than the LB Southwark (16.3%) and London (17.6%) average. Levels are higher in all Wards except Chaucer (11.3%) and Cathedrals (12.7%).

Table 5.7: Educational attainment by different geographical areas

	Cathedrals	East Walworth	Camberwell Green	Chaucer	Faraday	Newington	Southwark	London
No qualifications	12.7%	20.8%	19.3%	11.3%	21.8%	19.4%	16.3%	17.6%
Level 1 qualifications	8.0%	10.5%	11.3%	7.3%	13.0%	9.7%	9.4%	10.7%
Level 2 qualifications	9.1%	10.3%	11.6%	8.3%	12.8%	10.6%	10.2%	11.8%
Apprenticeship	0.8%	1.2%	1.2%	0.8%	1.2%	1.4%	1.1%	1.6%
Level 3 qualifications	15.2%	13.1%	10.5%	14.5%	10.3%	11.1%	10.5%	10.5%
Level 4 qualifications and above	45.8%	32.4%	34.3%	48.8%	28.6%	37.5%	43.1%	37.7%
Other qualifications	8.5%	11.7%	11.7%	9.0%	12.2%	10.4%	9.3%	10.0%

Source: ONS, LC5102EW - Highest level of qualification by age

5.7.4 Health Inequalities

There is a tendency for people belonging to protected characteristic groups, particularly young people, older people, disabled people, and BAME people, to experience poorer health[31]. Health within LB Southwark is mixed, with higher rates of deprivation than the England average, and 28.6% of children within the Borough living in poverty[32]. One of the key recommendations from the Southwark Annual Public Health Report is to *"prevent widening economic inequalities"*, reflecting the need to sustain economic wellbeing among all residents, in order to reduce health inequalities[33].

In terms of health issues within the Borough, there have been recent improvements in key indicators such as early deaths from heart disease, stroke, and cancer; with rates falling year on year since 2003. Rates of diabetes, skin cancer, and obesity in adults within the LB Southwark are also significantly better than the Greater London, and England averages. However, despite recent improvements in certain areas of health, there is a notable instance of preventable health issues, particularly obesity in children, smoking related deaths, and sexually transmitted diseases[34].

Local health priorities in the LB Southwark are identified as "mental and emotional wellbeing, preventing long term conditions through reducing risk (smoking, alcohol, diet and physical activity), HIV and sexual health, and early intervention in children and young people" where required, particularly in relation to child poverty[35] [36].

[31] Equality and Human Rights Commission, (2010); *How Fair is Britain?* report. Available at: http://www.equalityhumanrights.com/ publication/ how-fair-britain, accessed March 2016

[32] Public Health England, (2015); *Southwark Health Profile 2015*. Available at: http://www.apho.org.uk/resource/view.aspx?RID=50215& SEARCH=S*, accessed March 2016

[33] London Borough of Southwark, (2014); Southwark Annual Public Health Report 2013/14

[34] Public Health England, (2015); *Southwark Health Profile 2015*. Available at: http://www.apho.org.uk/resource/view.aspx?RID=50215& SEARCH=S*, accessed March 2016

[35] Public Health England, (2015); *Southwark Health Profile 2015*. Available at: http://www.apho.org.uk/resource/view.aspx?RID=50215& SEARCH=S*, accessed March 2016

5.7.5 Housing

There are high proportions of social rented housing, and low levels of privately owned or rented housing within the LB Southwark and all Wards within the Opportunity Area. 43.7% of housing in LB Southwark is socially rented, compared with 24.1% in London. In Camberwell Green and Faraday Wards the proportion is considerably higher (at 63.5% and 68.4% respectively).

The proportion of privately rented housing within the LB Southwark (24.9%) is broadly the same as levels within London (26.4%). Rates in Camberwell Green, Faraday, and Newington Wards are slightly lower than LB Southwark levels, however Cathedrals, Chaucer, and East Walworth Wards are somewhat higher than both the LB Southwark, and London levels (at 30.9%, 31%, and 28.5% respectively). By contrast, rates of privately owned or shared ownership housing within all Wards in the Opportunity Area is somewhat lower than the LB Southwark (31.4%) and considerably lower than London (49.5%) levels.

Within the LB Southwark, 39.2% of dwellings are overcrowded; somewhat less than the London average of 49.4%. The proportion of overcrowding within Wards in the Opportunity Area is lower than the Borough average; the lowest proportion within Camberwell Green Ward (30.4%) and the highest proportion within Cathedrals Ward (34.7%). Overcrowding is more likely to occur among some protected characteristic groups, and is also likely to be more detrimental to people belonging to certain protected groups, for example, young people and disabled people[37].

5.7.6 Access to Services and Facilities

The redevelopment of the Elephant and Castle Shopping Centre will result in the loss or relocation of: a bingo club; bowling club; the Coronet Theatre (music and night-club venue); the Language Centre; and the London School of Management Sciences. There are also two charities that provide help to those suffering from the effects of crime and young people affected by strokes. These types of facilities typically provide community resources and events for older people, children and youths. They can also provide space for cultural activities, and serve wider purposes such as offering affordable hireable space, education resources, and establishing a support network for people belonging to protected characteristic groups.

There are no alternative bingo facilities within the local area; the closest bingo club to the Opportunity Area is north of the River Thames in Aldgate (approximately 1.5 miles north). In south London, Gala Bingo in Canada Water is approximately 2 miles east[38]. The closest alternative bowling facility is also situated in Canada Water, approximately 2.1 miles east. There are three further bowling clubs near Holborn, approximately 2.5 miles north[39]. There are limited alternative facilities therefore, particularly for older and younger people who are the most likely to be accessing these sorts of clubs (and may be unable, or unwilling to use public transport to access alternative facilities further afield).

Within 1 mile of the Coronet Theatre site, there are a further 61 music and night-club venues of varying sizes; the closest within 0.5 miles. There is therefore a reasonable alternative provision of these facilities within the locality[40].

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[36] London Borough of Southwark, (2014); Southwark Annual Public Health Report 2013/14

[37] Equality and Human Rights Commission, (2010); *How Fair is Britain?* report. Available at: http://www.equalityhumanrights.com/ publication/ how-fair-britain, accessed March 2016

[38] Yellow Pages online. Available from: https://www.yell.com/ucs/UcsSearchAction.do?keywords=bingo&location=Elephant+%26+Castle&scrambleSeed=192008840, accessed March 2016

[39] Yellow Pages online. Available from: https://www.yell.com/ucs/UcsSearchAction.do?searchType=proximityadvance&keywords=bowling&location=Elephant+%26+Castle&scrambleSeed=192008840, accessed March 2016

[40] Yellow Pages online. Available from: https://www.yell.com/ucs/UcsSearchAction.do?searchType=proximityadvance&keywords=live+music+venue&location=Elephant+%26+Castle&scrambleSeed=2125072517, accessed March 2016

There are nine language schools which offer English and other language tuition within 1 mile of the existing facility in Elephant and Castle; the closest within 0.4 miles. There is therefore a reasonable level of alternative provision locally. The London School of Management and Science is a small learning facility for UK and foreign students, with its only campus at Elephant and Castle[41]. It is likely that the School may seek an alternative location, given that existing students are enrolled, and there are also numerous other learning facilities within London. Given that the majority of students are likely to be young people (who are able to travel, and use public transport) there could be reasonable alternative facilities which are accessible to students, if the School was unable to relocate.

5.7.7 Public Realm and Open Space

Open spaces and public realm offer opportunities for active and passive recreation, places to meet, and can help to improve health, wellbeing, and community cohesion. Safe and accessible spaces should cater to the needs of all people, and provide places where people of different ages, sexes, ethnicities, and abilities can enjoy together. The Elephant and Castle sub-area identified in the Borough's Open Space Strategy[42] has a total of *"0.7ha of park provision per 1,000 population, which is below the standard of 0.72ha per 1,000 population. This is expected to fall to 0.56ha per 1,000 population in 2026 as a result of population growth"*.

The sub-area has the highest population density of any of the eight sub-areas in the Borough. Additionally, the area has *"the second highest proportion of housing units with no access to private open space (after Bankside)"*. Both of these indicators suggest that there is high demand for open space within the sub-area. The Open Space Strategy also reports that residents within the sub-area reported that safety fears often prevented them using open spaces[43].

People sharing protected characteristics may be disadvantaged if they are unable to access public open space, and for certain protected groups there are considerable advantages associated with access to open space; for example, young and older people are likely to benefit from opportunities for active and passive recreation, and socialising with others[44].

5.7.8 Transport and Connectivity

The Elephant and Castle Shopping Centre benefits from excellent public transport connectivity (with a variety of local bus, rail and London Overground connections). The site has a Public Transport Accessibility Level (PTAL) rating of 6b; the highest level, emphasising the area's importance as a diverse residential, business and leisure destination[45] for local residents.

The Opportunity Area SPD[46] notes that the locality is a key transport interchange, but emphasises that connectivity and linkages between buses, London Underground, and London Overground services are generally poor. This may be restrictive for people belonging to certain protected characteristic groups; particularly older people, younger people, pregnant women (and those with pushchairs or buggies) and disabled people[47]. Numerous pedestrian and cycle links are available, however the Borough is aiming to improve their safety and reduce the severance created by major roads on many circulation routes.

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[41] Yellow Pages online. Available from: https://www.yell.com/ucs/UcsSearchAction.do?keywords=learning&location=Elephant+%26+Castle&scrambleSeed=192008840. Accessed March 2016.

[42] London Borough of Southwark, (2013); Open Space Strategy. Available at: http://www.southwark.gov.uk/download/downloads/id/6877/southwark_open_space_strategy_2013, accessed March 2016

[43] London Borough of Southwark, (2013); Open Space Strategy. Available at: http://www.southwark.gov.uk/download/downloads/id/6877/southwark_open_space_strategy_2013, accessed March 2016

[44] Equality and Human Rights Commission, (2010); *How Fair is Britain?* report. Available at: http://www.equalityhumanrights.com/publication/ how-fair-britain, accessed March 2016

[45] Transport for London, (2016); Public Transport Accessibility. Available at: https://tfl.gov.uk/info-for/urban-planning-and-construction/planning-with-webcat/webcat?Input=SE1+6TE&PlaceHolderText=eg.+NW1+6XE+or+530273%2C+179613&type=Ptal, accessed March 2016

[46] London Borough of Southwark, (2012); Elephant and Castle Opportunity Area Supplementary Planning Document

[47] Equality and Human Rights Commission, (2010); *How Fair is Britain?* report. Available at: http://www.equalityhumanrights.com/publication/ how-fair-britain, accessed March 2016

5.7.9 *Safety, security and well-being*

In January 2016, LB Southwark had the third highest rate of reported crimes of all 33 London boroughs, with the neighbouring borough of Lambeth second highest[48]. The highest proportions of crimes within the LB Southwark are violence against another person (30.9%), followed by anti-social behaviour (19.9%), and burglary (8.6%). At a Ward level, Cathedrals Ward and Chaucer Ward have the highest rates of crime within the Borough, with East Walworth Ward, Camberwell Green Ward, and Newington Ward ranked fourth, seventh, and eighth respectively. The highest instances of crime in all Opportunity Area Wards are antisocial behaviour, and violence against another person[49].

The feeling of safety and security within a person's local area are key to ensuring their personal wellbeing. All people are vulnerable to feelings of being unsafe, however these may be particularly acute for people belonging to certain protected characteristic groups, including young people, older people, disabled people, women, and people belonging to a particular ethnicity, or sexual orientation[50].

5.7.10 *Community Cohesion*

To ensure healthy communities which are functional, safe, and enjoyable places to live and work, it is important to promote community cohesion and good relations between different groups. Encouraging civic engagement and ensuring dialogue with all people in the community; particularly those belonging to protected characteristic groups, is an important step in working towards community cohesion. For people belonging to protected characteristic groups, their feelings of a lack of cohesion (or exclusion) may be more acute than other people.

While the LB Southwark was one of the areas affected by civil disturbances in August 2011, the consultation undertaken by Southwark Council subsequently found that there is generally a strong sense of community in Southwark: approximately 80% of residents feel that people in their local area treat each other with respect and consideration, and 92% of residents agree that their local area is a place where people from different backgrounds get on well together[51].

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[48] Metropolitan Police Crime Statistics. Available at: http://maps.met.police.uk/access.php?area=E09000028&sort=count&order=a, accessed February 2016

[49] Metropolitan Police Crime Statistics. Available at: http://maps.met.police.uk/access.php?area=E09000028&sort=count&order=a, accessed February 2016

[50] Equality and Human Rights Commission, (2010); *How Fair is Britain?* report. Available at: http://www.equalityhumanrights.com/ publication/ how-fair-britain, accessed March 2016

[51] Southwark Council (2011) Community Conversations 2011, Summary Report. Available at:

http://www.southwark.gov.uk/download/7158/community_conversations_report , accessed March 2016.

6 CONSULTATION AND ENGAGEMENT

6.1 Introduction

This chapter presents findings from the business and customer surveys conducted by AECOM with directly affected business owners and representatives (Section 6.2), as well as with customers of the affected businesses (Section 6.3).

6.2 Business Survey Results

The following is a breakdown of the results from the surveys conducted with businesses within the area affected by the proposed Elephant and Castle Shopping Centre redevelopment. The business survey achieved **a total of 86 responses** from a mix of business owners and representatives such as store managers and other employees.

Forty-eight of the businesses interviewed were from within the shopping centre itself, eighteen were market stalls and nine interviews were completed with representatives from the railways arches. The remaining businesses interviewed were located in Hannibal House (6) or were stands in the mall/barrow (5).

Table 6.1: Business interviews by category

Business location	Number of interviews completed
Shopping centre	48
Market stall	18
Arches	9
Hannibal House	6
Stand in mall/barrow	5
Base:	86

Due to the prevalence of national chain stores within Elephant and Castle, the decision was taken to only ask those who were business owners/proprietors demographic questions as their responses were more pertinent to the Equality Analysis. As a result, there are **40 responses to the demographic section by business owners** in the area. The analysis of these responses has been considered as well, the detail of which is provided below.

6.2.1 Nature of the businesses

A mix of business types were recruited to take part in the research. **Table 6.2** shows the breakdown of completed interviews by business category, and shows that almost half (39) interviews were conducted with businesses that class themselves as 'Independent'. Twenty-two interviews were conducted with market stallholders and a further 19 were conducted with managers of local outlets of national chain stores.

Table 6.2: Business interviews by category – Base (86)

Business category	Number of interviews completed
Independent shop or business	39
Market stall	22
Local outlet of a national chain	19
Franchise	4

Business category	Number of interviews completed
Community organisation or religious organisation	1
International chain	1
Base:	(86)

Table 6.3 provides details on the types of services provided by all businesses surveyed.

Table 6.3: Store services provided- Base (86)

Store type	%
Trades and other services	41%
Clothing/shoe shop	13%
Fast food outlet/takeaway	10%
Financial services	9%
Beauty/hair salon	7%
Restaurant	5%
Supermarket/general food shop	5%
Community organisation / charity / advice services	3%
Health shop	2%
Mobile phone shop / electrical goods	2%
Betting shop	1%
Specialist food shop	1%
Base:	(86)

Of the independent businesses that responded to the demographic questionnaire, 21 class themselves as suppliers of 'trades and other services' Female proprietors run 38% (8) of these stores. Two of the female business proprietors run the two beauty/hair salons listed below- one of those is run by a Latin American business owner, the other is run by someone from a black ethnic background. Male proprietors run all seven clothing/shoe stores and the three restaurants and listed in the table.

In terms of ethnic breakdown, Latin American proprietors run two of the three restaurants listed below- the other is run by an owner Asian/Asian British origin. Three of the five fast food outlets are run by persons from Black/Black British backgrounds, the remaining two are run by owners of Asian/Asian British origin.

Table 6.4: Store services provided (independents only) - Base (40)

Store type	N
Trades and other services	21
Clothing/shoe shop	7
Fast food outlet/takeaway	5

Store type	N
Restaurant	3
Beauty/hair salon	2
Financial services	1
Mobile phone shop / electrical goods	1
Base:	(40)

6.2.2 *Business ownership*

The business survey asked respondents to indicate if they were the business owner, manager or other representative. Half of those interviewed were business owners and 44% were managers. The remaining respondents (7%) indicated that they were a representative of the participating organisation.

Table 6.5: Respondent position within business - Base (86)

Respondent position	%
I own the business	49%
I am the business manager	44%
Other- I have the permission of the owner or manager to take part in this survey	7%
Base:	(86)

As shown in **Table 6.6** the majority of responding business owners were from Black African/Caribbean/British backgrounds (14 respondents) and Latin American/Hispanic backgrounds (10 respondents).

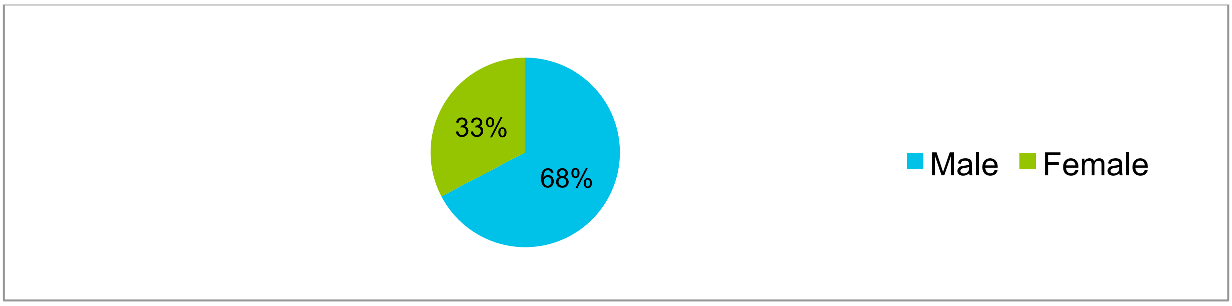
Table 6.6: Ethnicity of business owners - Base (40) all answering

Ethnicity	Number of interviews completed
Black/African/Caribbean/Black British: African	14
Latin American/Hispanic	10
Asian/Asian British: Other Asian	6
Asian/Asian British: Pakistani	2
Black/African/Caribbean/Black British: Caribbean	1
White: English/Welsh/Scottish/Northern Ire/British	1
White: Irish	1
White: other white	1
Mixed/multiple ethnic group: White and Black African	1
Asian/Asian British: Indian	1
Asian/Asian British: Bangladeshi	1
Arab	1

Base:	40

Amongst business owners, 67% were male and 3% were female.

Chart 6.1: Gender (base 40)



In terms of the age of responding business proprietors the majority were aged between 35 and 54 years (23), two respondents who were aged over 65. The majority of business proprietors completing the demographic questionnaire were male (27), while 13 were female. Forty respondents answered the question regarding any physical disabilities all of them stated that they did not have any disabilities.

Table 6.7: Age range grouping of business owners- Base (40) all answering

Age bands:	Respondents
25-34	5
35-44	13
45-54	10
55-64	10
65-74	2
Base:	(40)

The majority of business owners (25) stated that they view themselves as Christian, while 11 stated that they are followers of Islam.

Table 6.8: Religious affiliation of business owners- Base (40) all answering

Religion	Respondents
Christianity	25
Islam	11
No religion	2
Buddhism	1
Prefer not to say	1
Base:	(40)

6.2.3 Leaseholder type

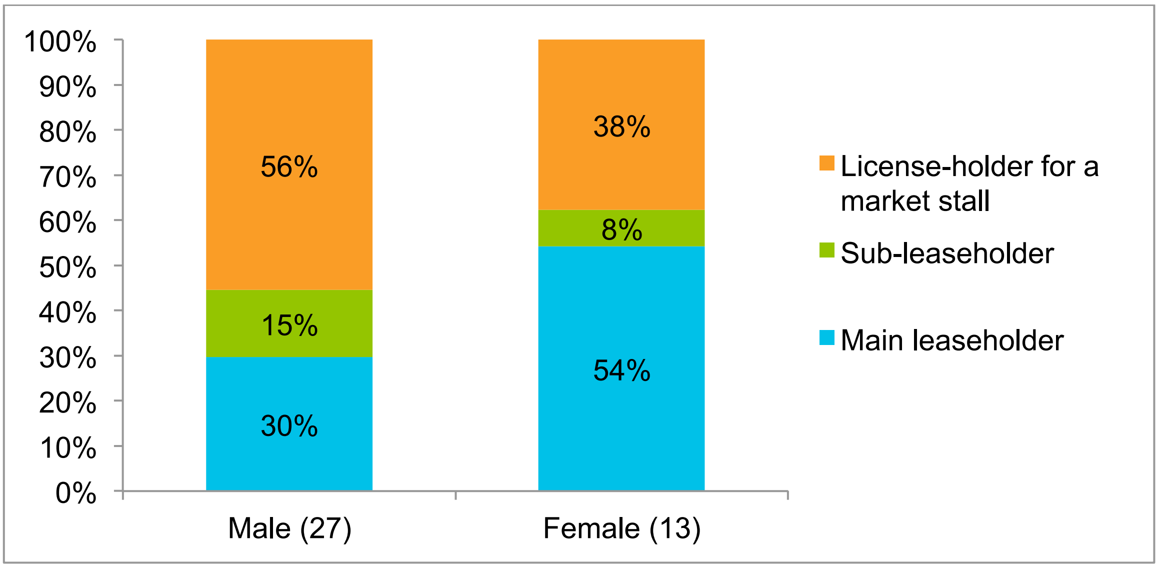
As shown in **Table 6.9** the majority of those interviewed classified themselves as the main leaseholder.

Table 6.9: Lease type - Base (86)

Lease-type	%
Main leaseholder	62%
License-holder for a market stall	28%
Sub-leaseholder	7%
Don't know	4%
Base:	(86)

Amongst business owners, the breakdown of lease type within gender is shown in Chart 6.2 and suggests that there are a greater proportion of male stallholders than female ones - 75% of the 20 market stallholders who responded to the demographic section were male. While 54% (7) of female business representatives described themselves as the main leaseholder.

Chart 6.2: Lease type by gender - Base (40)



Six of the ten Latin American business proprietors are the main leaseholder- the greatest proportion of all ethnic groups. There are fewer Latin American business owners among the market stall contingent- with just one of the Latin American license holder for a market stall. Market Stall license holders make up six out of ten of the Asian/Asian British business respondents compared to ten of the 15 Black/Black British business proprietors.

6.2.4 Number of leases

The majority of responding organisations had one lease within the sample area. Eleven percent of all responding organisations had more than one lease.

Table 6.10: Number of leases held in sample area – Base (86)

Number of leases	%
One	89%
Two	5%
Three	5%
Four	1%
Base:	(86)

Amongst business owners, 12% (5) have more than one lease within the sample area (Table 6.11).

Table 6.11: Number of leases held in sample area business proprietor group– Base (40)

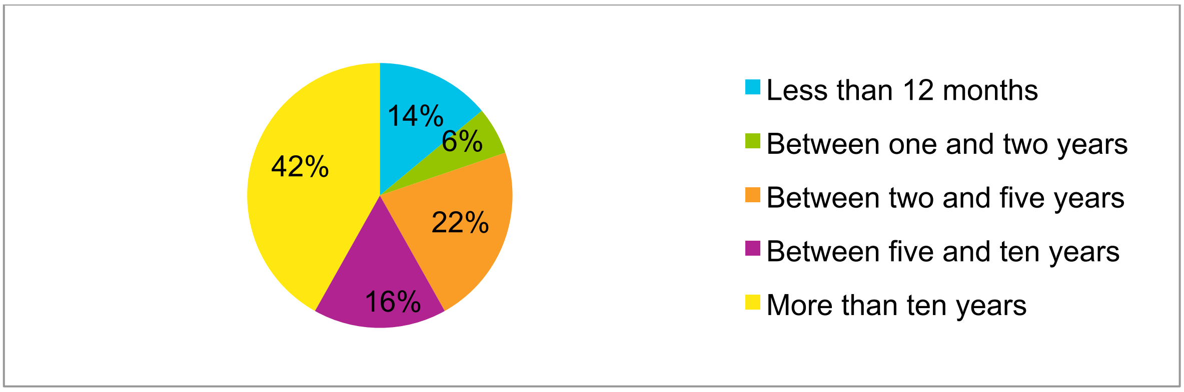
Number of leases	%
One	88%
Two	3%
Three	8%
Four	3%
Base:	(40)

Of these there are two female proprietors with more than one lease. Three of the business respondents who have more than one lease are from Asian ethnic backgrounds.

6.2.5 Lease tenure

Analysis of lease tenure shows that four in ten (42%) of the businesses interviewed have been in their current location for more than ten years and are well-established in their locations. A fifth of lease holders have been in their premises for two years or less.

Chart 6.3: Lease tenure – Base (86)



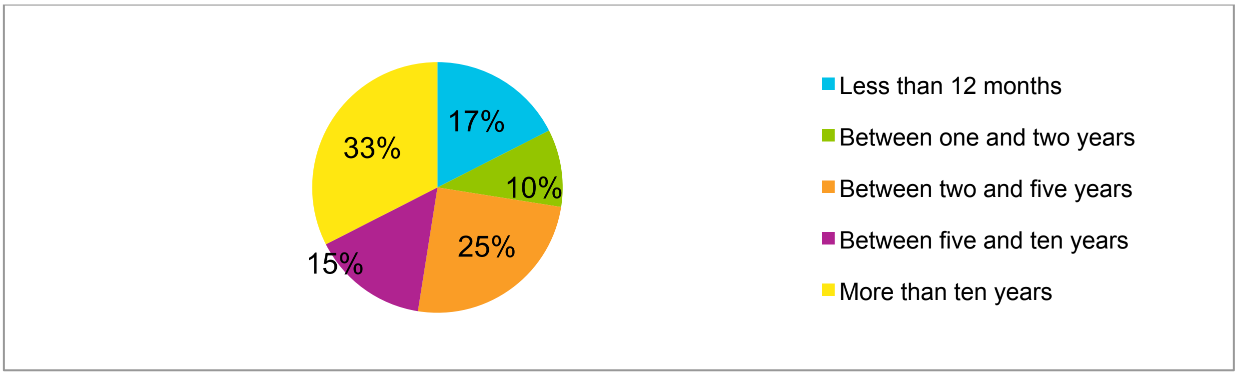
When we look at lease tenure by organisation category (where base sizes allow) we see that the national chains represented in the survey tend to have longer residence in the sample area, with 14 of the 19 businesses interviewed having their position for over ten years. Response from independent shops was polarised, ten businesses have been in the sample area for less than 12 months, while a further 12 have been there for over ten years.

Table 6.12 Lease tenure by organisation category

Lease tenure	Organisation category		
	Independent shop or business	Market stall	Local outlet of a national chain
Less than 12 months	10	2	0
Between one and two years	3	2	0
Between two and five years	7	8	3
Between five and ten years	7	3	2
More than ten years	12	7	14
Base:	(39)	(22)	(19)

Lease tenure amongst business owners surveyed indicates that a third (33%) have been in their current location for more than ten years, 9% less than for all businesses surveyed.

Chart 6.4: Lease tenure (Business owners) - Base (40)



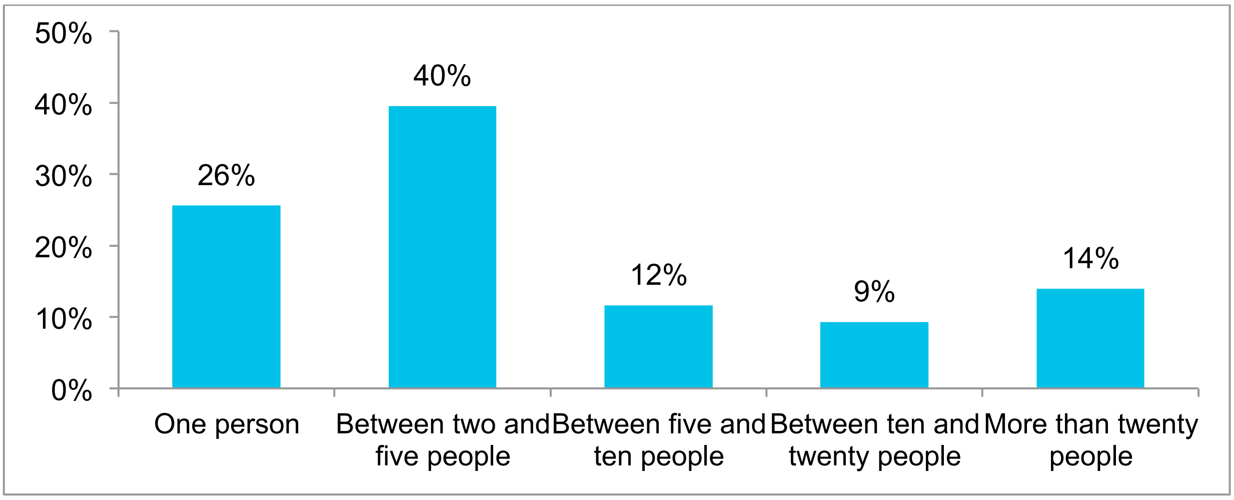
When we analyse this by ethnicity, the length of time that the length of time that white business owners had held leases for was more than 10 years in 66% (2) of cases, whilst 30% (3) of Latin American / Hispanic owners, 20% (3) Black / Black British owners and 50% (5) of Asian owners had held the lease for more than 10 years. Across ethnic groups the responses indicated few leases had been held for less than 12 months, with the exception of 30% (3) Latin American / Hispanic business owners.

When we analyse the data by gender, 85% (11) of female business proprietors have been in their premises for two years or more – this proportion is slightly lower amongst male business leaseholders at 67% (18).

6.2.6 Information on employees of the businesses

All respondents were asked how many employees their business has on site. A quarter of businesses are run by a solo member of staff and 14% have more than twenty employees on site. The majority of sites (40%) employ between two and five people.

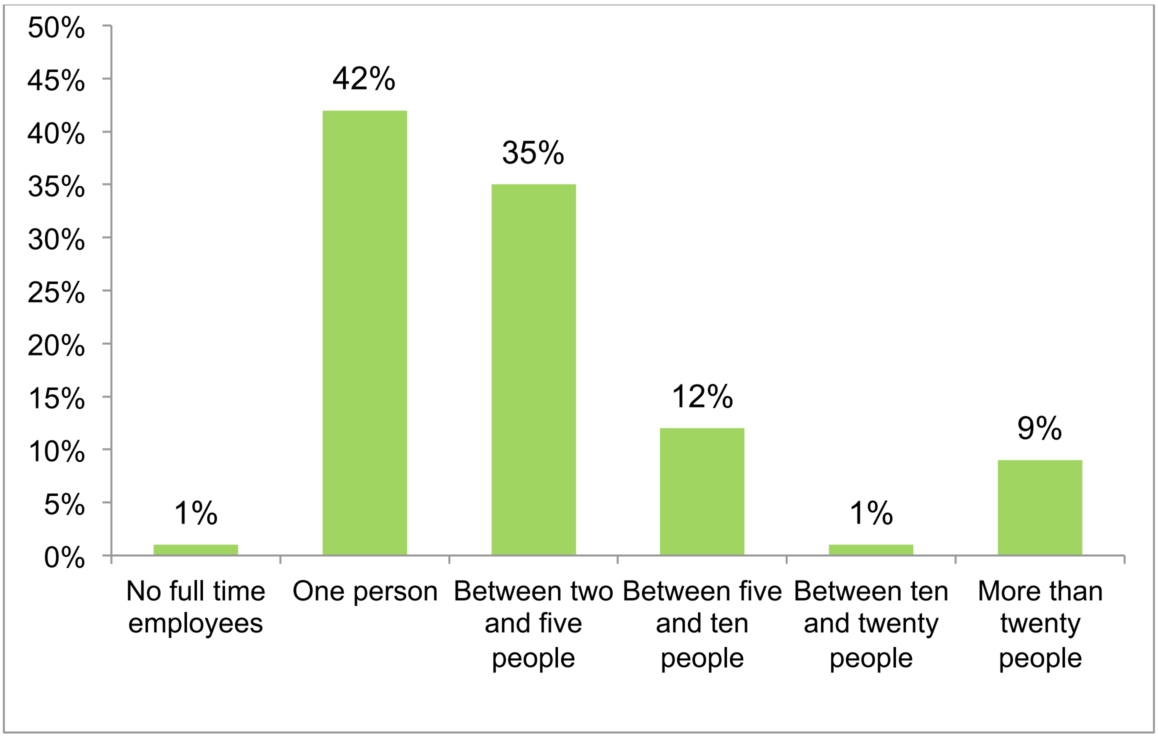
Chart 6.5: Number of employees on site - Base (86)



When we look at the data for business owners only, we see that the proportion of firms with one employee is much higher at 53%. Twenty four percent (5) of the 21 firms with one employee are run by women and on average female businesses respondents have 3 employees, while male business owners have slightly more, 4, on average. All of the businesses (3) that have more than ten employees are run by proprietors from a Latin American background, two of these have more than twenty employees.

The majority of businesses interviewed have 1-5 full time employees (77%). Around one in ten businesses (9%) have more than twenty employees. Unsurprisingly market stalls tended to have the fewest full time employees.

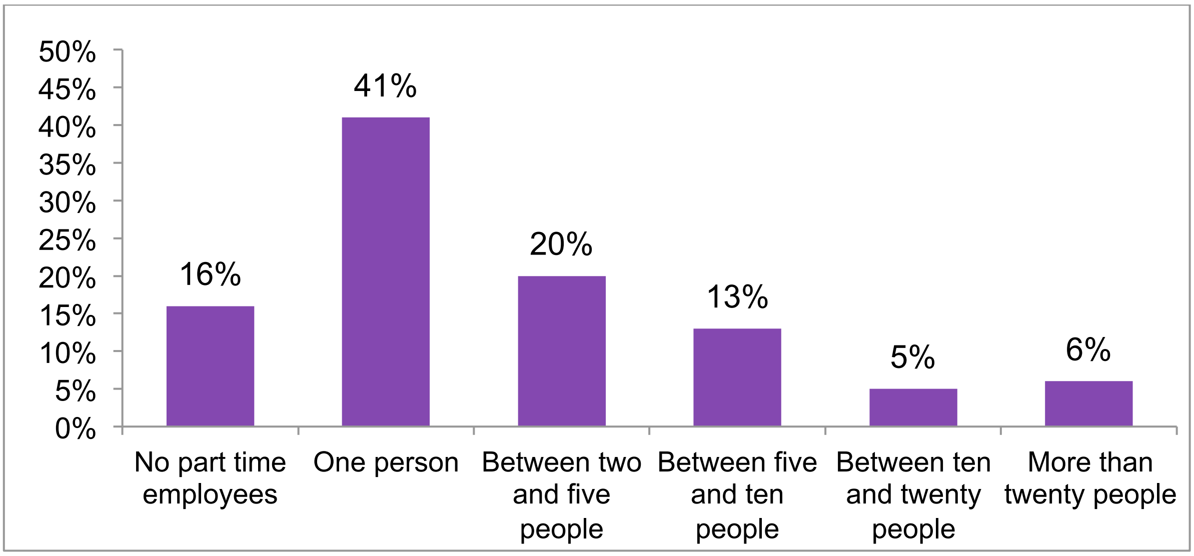
Chart 6.6: Full time proportions



The proportions of full time staff amongst responding organisations that were eligible to complete the demographic section shows that this group comprises a higher proportion of firms run by one person. As per the overall employment figures Latin American-run independent enterprises have the highest number of full time employees.

Sixteen percent of all businesses interviewed stated that they have no part time staff and all of these businesses were independent traders or market stalls.

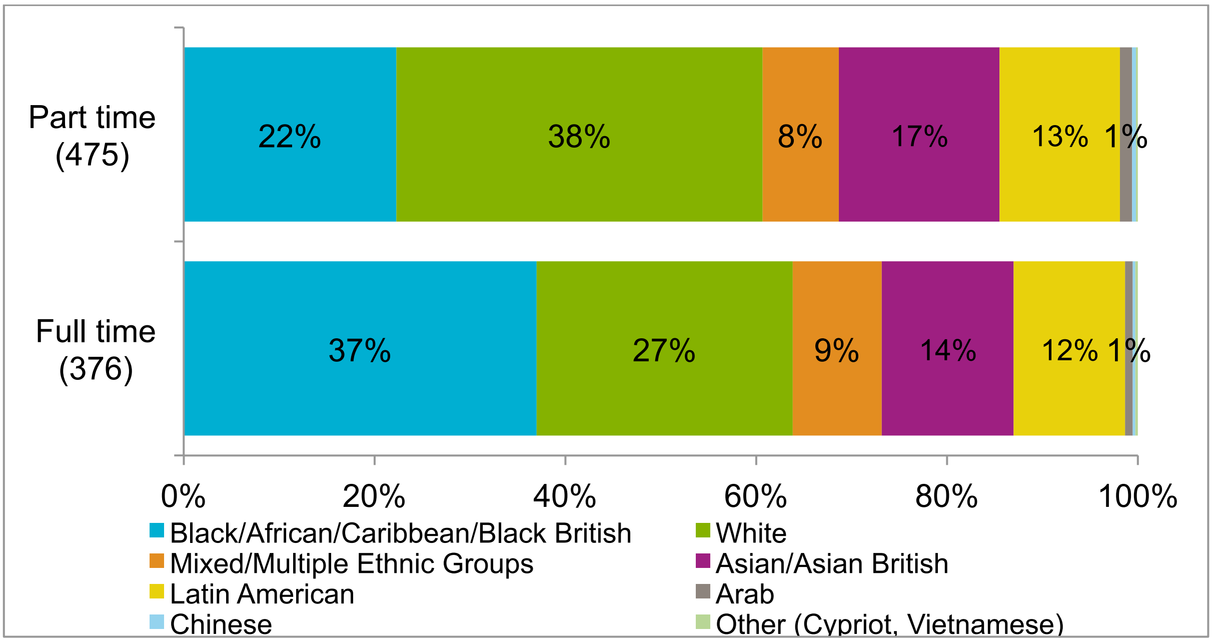
Chart 6.7: Part time proportions



Business owners were asked to provide a breakdown of the ethnic make-up of their employees and to state how many of those by ethnic group work full time and part time. The chart below shows the breakdown of all full and part time workers by ethnic grouping.

As shown in Chart 6.8, 38% of all full time workers are from white backgrounds making up the greatest proportion of full time workers. Those from Black/African/Caribbean/Black British backgrounds make up just over a fifth of full time workers (22%) but are the most represented ethnic grouping within part time workers making up 37% of this group. Representation from other ethnic groupings is fairly consistent with similar proportions across part time and full time workers.

Chart 6.8: Full time and Part time worker breakdown by ethnicity



Note: Ethnic groupings within each employment group shown as a percentage of all full/part time workers – bases for each employment group shown in axis

As seen with full time staff Latin American run-firms have the highest proportion of part times staff with 38% (3) of them having between five and twenty part time staff. Whereas 37% of businesses are run by proprietors from Black/Black British backgrounds.

6.2.7 Nature of service provision

Over half (58%) of all business proprietors strongly agreed that their customers are from the local community and in all 85% of all respondents agreed with this statement. Nine of the ten respondent Latin American business owners agreed with this statement and half (5) strongly agreed. 87% (13) of Black/Black British business proprietors agreed with this statement.

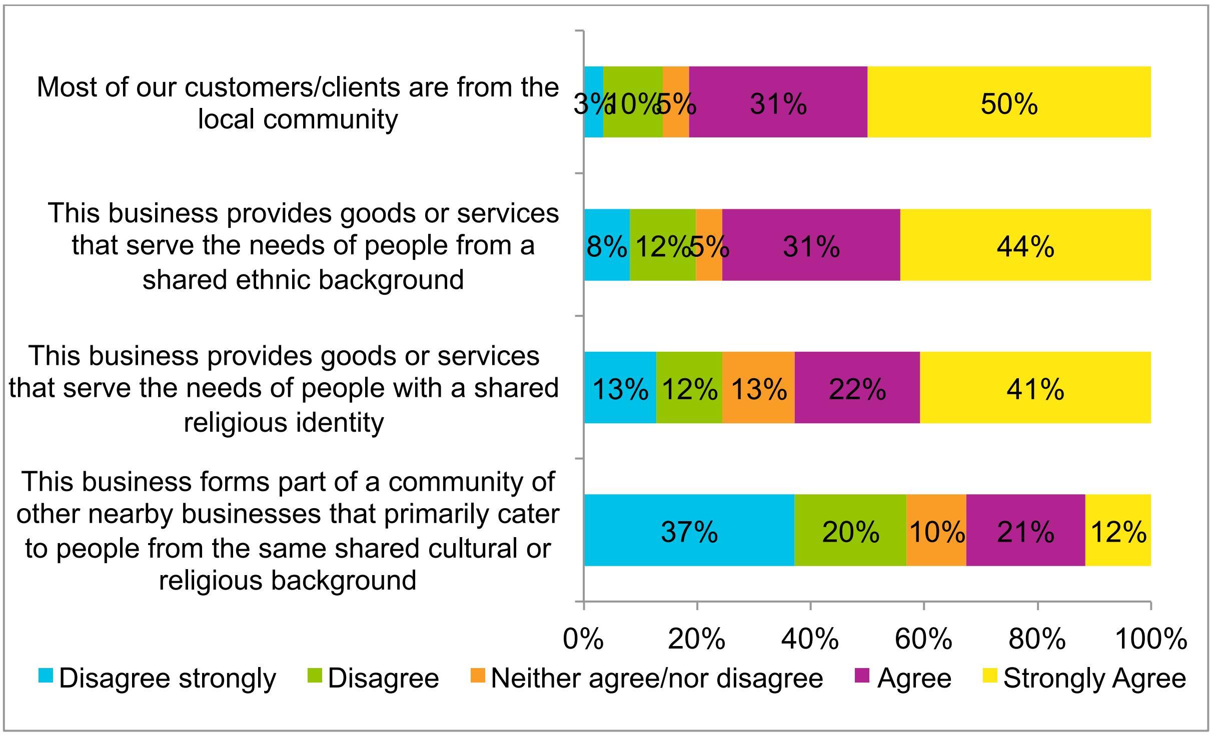
Seventy percent of all respondents agreed that their organisation provides goods or services that serve the needs of people from a shared ethnic background. Half of Asian/Asian British business owners and two-thirds of Black/Black British business owners agreed with this statement. Nine of the ten responding Latin American business owners agreed with this statement, indicating that they have the most homogenous customer base.

There is little difference when we compare responses to this question based on gender- 90% of male and female respondents agreed with his statement. In terms of response by religious background, 72% (18) those who classify themselves as Christian agreed with this statement- the equivalent proportion amongst those who classify themselves as followers of Islam is lower at 64% (7).

Just under six in ten (58%) of responding organisations strongly agree that their business provides goods or services that serve the needs of people with a shared religious identity. Just over half (53% or 80) respondents from Black/Black British backgrounds agreed with this statement, this rises to 70% (7) among Latin American business proprietors. Sixty percent (15) of those who classify themselves as Christian agreed with this statement- the equivalent proportion amongst those who classify themselves as followers of Islam is slightly lower at 55% (6).

Just over six in ten (63%) of responding organisations disagreed with the statement ‘This business forms part of a community of other nearby businesses that primarily cater to people from the same shared cultural or religious background’- 30% of responding organisations felt that this statement was true of their organisation. Half (5) of Latin American business owners agreed with this statement- the highest level of endorsement seen across any ethnic grouping. The proportion amongst Black/Black British respondent is 20% (3), and amongst those who are Asian/Asian British it is lower at 10% (1 response in agreement). Analysis by religious grouping shows a higher proportion of agreement amongst those who classify themselves as Christian 36% (9) when we compare with those who are followers of Islam (18% or 2 responses).

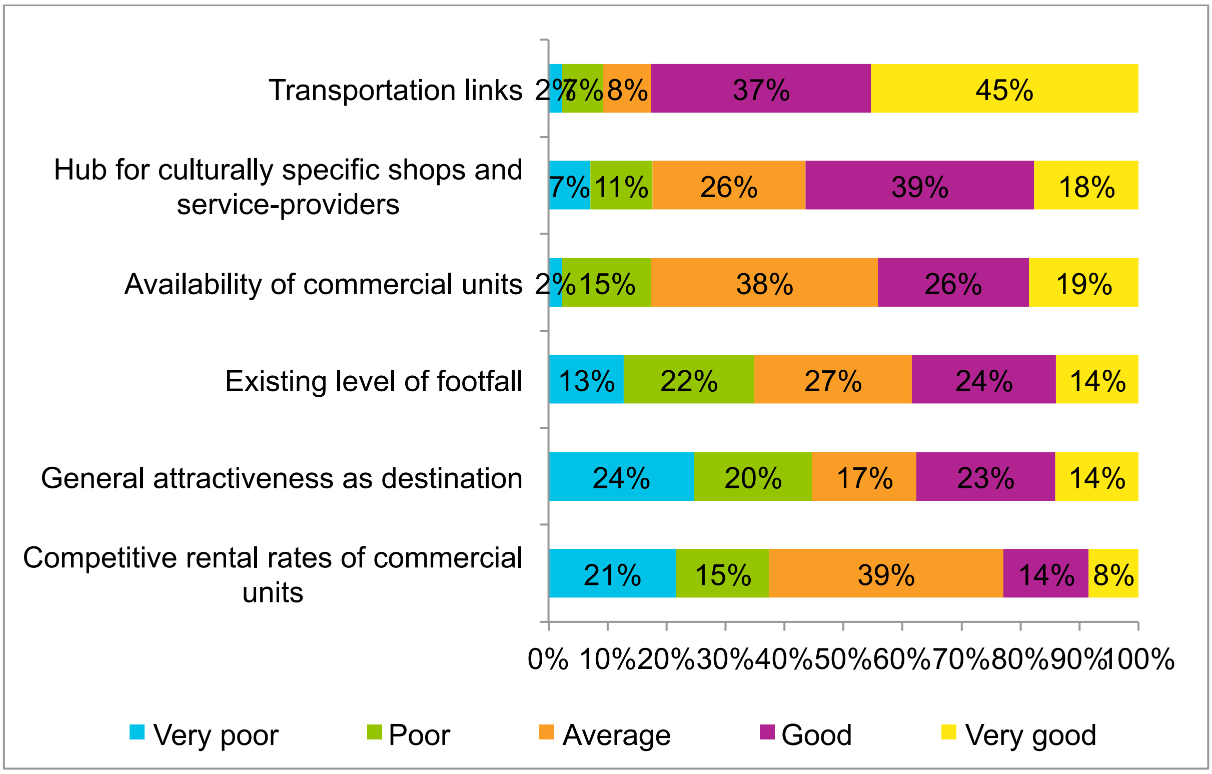
Chart 6.9: Attitudinal statements- Base (86)



6.2.8 *Opinions on the strengths of Elephant & Castle*

All business respondents were asked to rate Elephant and Castle across various attributes on a five point scale from very poor to very good. 'Transportation links' was the best rated attribute with 83% of all respondents stating that they are 'good' or 'very good'. Elephant and Castle was thought to be a 'good or very good' hub for culturally specific shops and service providers by 56% of respondents. Respondents rated elephant and castle most negatively on 'general attractiveness as a destination' (44% rated this as 'poor' or 'very poor') and 'Competitive rental rates of commercial units '(36% rated this as 'poor' or 'very poor').

Chart 6.10: Rating of Elephant and Castle on locational attributes (ranked on Good/Very good endorsement) – Base (86)



When the data is analysed for business owners only from an equalities perspective, the data reveals slight variations. There is little difference in ratings of Elephant and Castle as a location to do business when responses are analysed by gender. Although it is noteworthy that female business owners rated Elephant and Castle more negatively for 'general attractiveness as destination' than their male counterparts did: 54% (7) of female business owners rated it as 'poor' or 'very poor' vs. 37% (10) of male business owners.

'Transportation links' was the best rated attribute amongst both white and BME business owners.

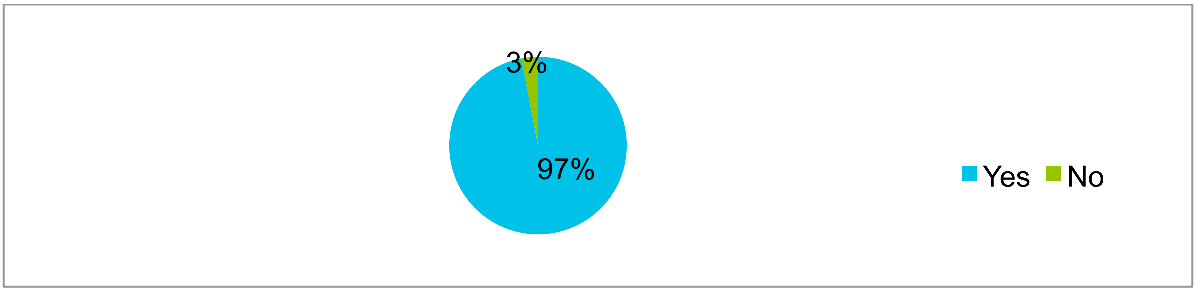
Elephant and Castle was thought to be a 'good or very good' hub for culturally specific shops and service providers by 55% of respondents. This increases to 90% (9) of the Latin American business owner group.

Business owners rated Elephant and Castle most negatively on 'existing level of footfall' (53% rated this as 'poor' or 'very poor') and 'Competitive rental rates of commercial units '(55% rated this as 'poor' or 'very poor'). Latin American business owners have the most positive outlook when it comes to rating Elephant and Castle on 'existing level of footfall' with 70% (7) of them rating it as 'good or very good'- the equivalent proportion amongst Black/Black British and Asian/Asian British is 7% (1) and 10% (1) respectively

Four of the ten respondent Latin American business owners rated the 'competitive rental rates of commercial units' in Elephant and Castle as 'good' or 'very good' – this falls to 13% (2) amongst Black/Black British and 10% amongst Asian/Asian British business owners. 'Poor' and 'very poor' ratings for this aspect are also higher amongst Black/Black British and Asian/Asian British business owners than seen amongst the Latin American group.

All respondents were asked if they were aware of the redevelopment of Elephant and Castle and 97% of all respondents stated that they were aware of it.

Chart 6.11: Awareness of redevelopment of Elephant and Castle Shopping Centre- Base (86)



All male business owners were aware (27) but one female business proprietor was unaware of the plans. As awareness is so high there is little difference in awareness amongst ethnic groups.

6.2.9 Opinions on the proposed redevelopment

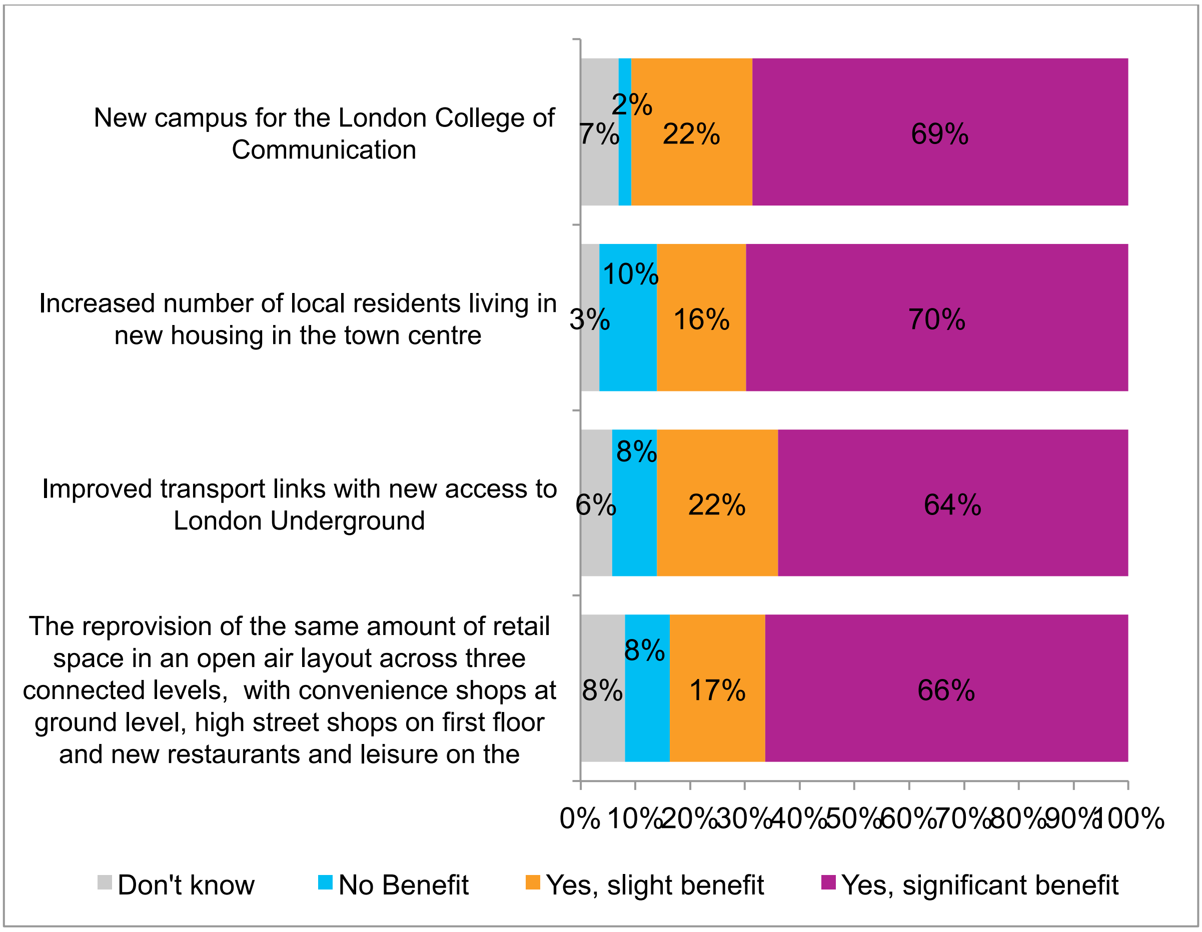
All respondents were then asked about various elements of the current proposed redevelopment and asked to what extent they felt that they would benefit businesses in Elephant and Castle, if at all.

Total positive endorsement (combined ‘slight benefit’ and ‘significant benefit’) was highest for the redevelopment proposition to create a new campus for the London College of Communication with 91% of all respondents stating that this will be of benefit to businesses in the area.

Seven in ten respondents felt that having an increased number of local residents in new housing in the town centre would result in a significant benefit to business in the area. Ten percent felt that they would bring no benefit.

Eighty-six percent of respondents felt that ‘Improved transport links with new access to London Underground’ would bring ‘ a benefit to the area. The large majority (83%) of respondents also agreed with the statement that ‘The reprovision of the same amount of retail space in an open air layout across three connected levels, with convenience shops at ground level, high street shops on first floor and new restaurants and leisure on the second floor’.

Chart 6.12: Impact rating of elements of redevelopment (ranked on overall positive endorsement - NET of 'yes' responses) – Base (86)

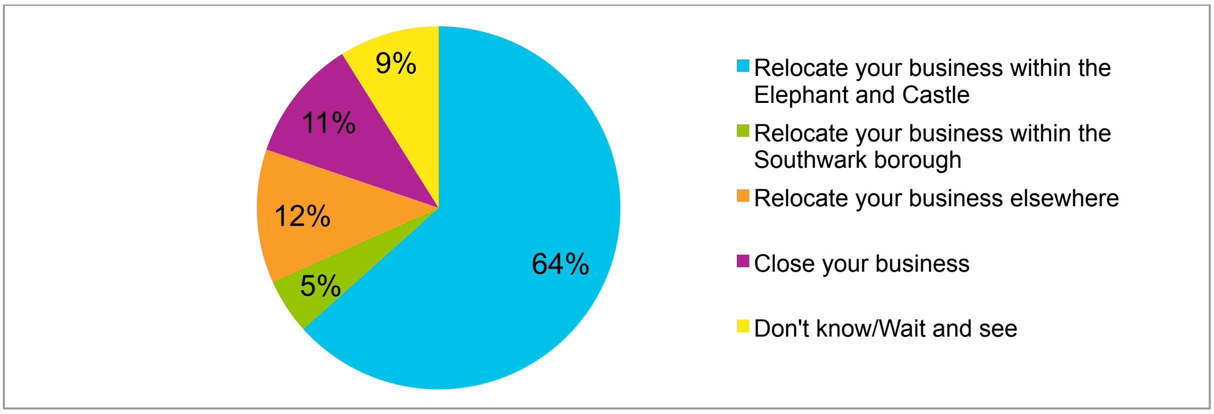


All respondents were asked what their preferred option would be for their business assuming that the developer obtains planning permission for the proposed redevelopment. Sixty four percent of respondents plan to relocate their business within Elephant and Castle. Twelve percent plan to relocate outside Southwark, and 11% will close their business.

Amongst business owners, all of those who stated they will close their business are male and 93% (12) of female business owners plan to relocate within Elephant and Castle. Two of the three white business owners plan to relocate their business elsewhere – i.e. outside of Southwark. 40% (4) of Asian/Asian British business owners will close their business if the redevelopment progresses and a further 20% (2) plan to relocate outside of Southwark. All of the Latin American business owners stated that their intention is to remain and relocate within Elephant and Castle. When the responses are analysed by religion, 84% of Christian respondents stated their intention to relocate their business within Elephant and Castle (21). Business owners who stated that they are followers of Islam expressed more pessimism regarding their intentions- with 36% (4) of them stating that they will close their business and a further 27% (3) stating that they will relocate outside of Southwark.

Although organisation subset bases are low their response can be seen as indicative of wider response. Market stallholders were most likely to say that they relocate their business outside of Southwark (22% of 22 market stallholders interviewed stated that this was their intention).

Chart 6.13: Preferred option for business post-redevelopment- Base (86)



Respondents were then asked why they gave their specific response. Those that plan to stay in Elephant and Castle tended to state customer loyalty and being well-established in the area as key reasons for wishing to remain in the area.

- 'Nice transportation links, will bring more people to the area and housing will improve footfall' - Independent trader
- 'I am a local resident and live near here - it is convenient for me and I am used to the area.' - Independent trader
- 'I have been here for more than 18 years and have many regular customers.' - Independent trader

Those that plan to relocate outside of Southwark gave various reasons for planning to do this; some had done this out of choice and others because of uncertainty arising out of the impending development.

- 'Because the new Elephant & Castle won't have space for a market stall area - other accommodation will be too expensive.' - Market stall holder
- 'Because rent is so high and there are lots of cheaper opportunities elsewhere in London and there is not enough footfall with the empty units' - Independent trader (barrow)
- 'It's finished here. Business has been poor for 10 years.' - Market Stall holder

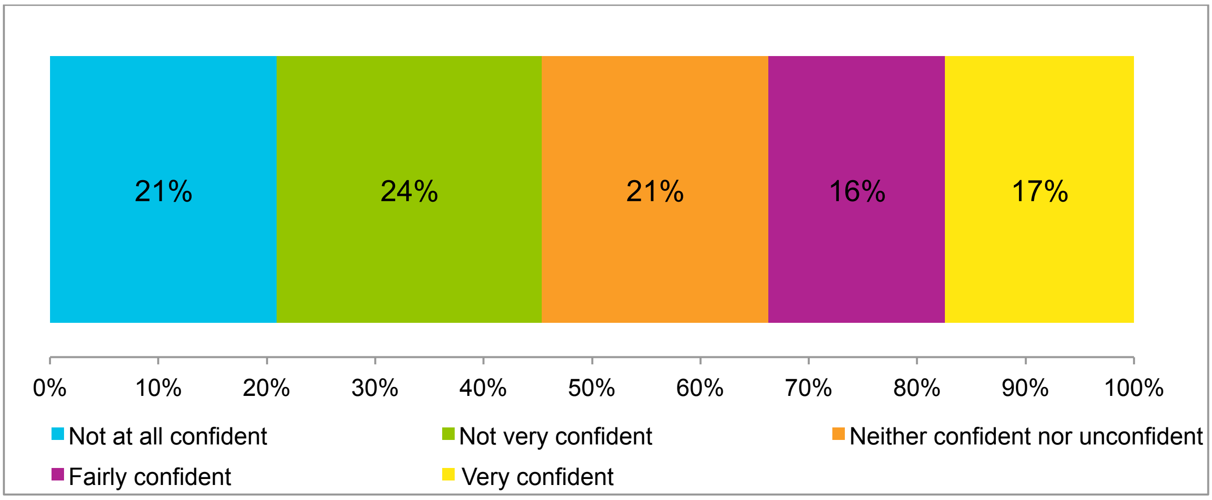
Those that believe that they will need to close their businesses included those who currently have plots in the market area who believe that there won't be allocated space for market- type retailing in the new development. Other business owners felt pessimistic about the prospects of being able to afford rents in the new development.

Further to this respondents were then asked how confident they felt that they will be able to relocate within the (planned) new town centre or the immediate area surrounding this.

Just over a third (34%) of respondents expressed a positive level of confidence as to whether they would be able to relocate. Twenty one percent of business respondents stated that they are 'not at all confident' about their ability to relocate their business within the new development. Just under a quarter (24%) rated their confidence level as 'not very confident'.

There is no obvious pattern of response when confidence levels are analysed by organisation type- however it can be noted that all of those who are 'not at all confident'; about their chances of relocating within the redevelopment are either independent traders (9 responses) or market stallholders (9 responses). Furthermore in general those responding on behalf of local outlets for chain stores expressed a greater degree of confidence than those responding from other organisation types.

Chart 6.14: Confidence level expressed regarding relocation within new development - Base (86)



Respondents were then asked why they expressed their particular level of confidence regarding their chances of securing space in the new town centre development. Those that expressed confidence tended to point towards their faith in their business and a belief that their existing tenure at the current site will mean that they are offered space as a priority.

- '[We are] a big business and can cater for high traffic, office workers etc.' - Local outlet for national chain
- 'I have a good customer base. I am unique in what I sell; the kind of people I attract will want healthy juices'. - Independent trader
- 'My business will suit the new proposals - everyone wants coffee'. - Independent trader
- 'Because I have been here for so many years and want more time here'- Independent trader
- 'I think I will be given somewhere as I have lived in the area for 30 years.' - Independent trader

Others who expressed confidence stated that they are currently attempting to relocate and so are hoping that this will come to fruition.

- 'We are fighting to get relocated and will keep on trying - that's all you can do, fight and try!'- Independent trader
- 'Because there has been talk of us re-locating to the new building across the road' - Local outlet for national chain

Those who rated their confidence level as 'not very confident' or 'not at all confident' tended to express concerns that the rent within the new development will simply be too expensive for them to consider relocating within in it.

- 'The size with a reasonable rent isn't possible at the moment, so not sure what will happen.' - Independent trader
- 'Because I have looked around and no shops are available. They are also more expensive than I budgeted for - think we will be priced out.' - Independent trader
- 'As I said before there rents will be too high, they are pushing us out.' - Independent trader
- 'We feel that we are being driven out so high street business can move in, it will affect rents and [the] community' - Independent trader
- 'The developers will be out to get as much rent as possible which attracts big PLC businesses' -Independent trader- arches

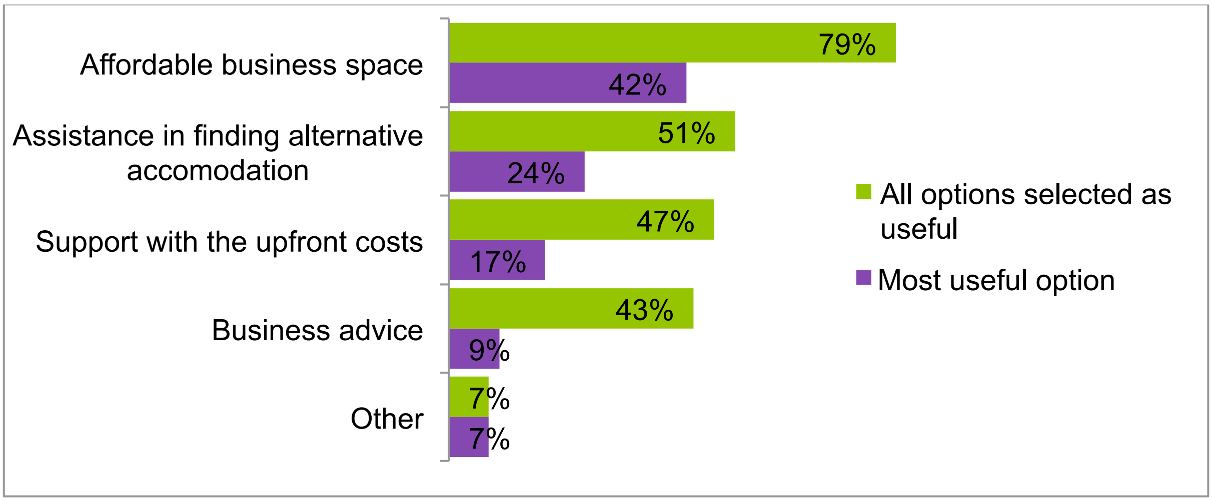
- 'We may be priced out of the area in terms of the new rates and availability in the area is very limited' - Independent trader

All business respondents were then asked, if the development progresses, what measures they would find useful to enable them to continue operating their business.

'Affordable business space' was the most commonly cited measure that business respondents felt would be useful to help them to continue their operation (consisting of 79% of all responses when respondents chose all options they would find useful) and 42% rated this as the most useful intervention to allow them to continue. This is reflective of previous concerns cited regarding the (perceived) high potential for rent increases in the new development.

'Assistance in finding alternative accommodation' was the second most cited measure in terms of utility. 'Support with the upfront costs' and 'Business advice' receive lower endorsement when respondents are choosing their one most useful measure, however the similar endorsement at the multiple response question indicates that a sizable proportion of the business respondents would welcome all of these measures.

Chart 6.15: Business continuity measures rated as useful- Base (86)



Respondents were asked whether they would like to make any further comments regarding the proposed redevelopment and any potential impact this might have on their business.

Several independent traders indicated that they require more information regarding compensation and what measures will be available to help them continue trading while the redevelopment is taking place.

- 'I find it unfair. Small business will be forced out without any guarantee of being moved to another space to continue their business. We are not promised anything and those with new leases have no compensation built in.' - Independent trader
- 'I urgently need more info and for the Council to help me if they intend closing me down - need more footfall going forward.' - Independent trader
- 'It would be nice to know what will eventually happen so that I can make plans.' - Independent trader

Market traders expressed similar misgivings regarding the feeling of uncertainty regarding their position, whether alternative space for the market will be provided and what will happen to them in the interim period.

- 'At the moment we only have this business for my family to live on. Been here for 8 years - what will I do - go on benefits? We need a new place to move to.' - Market stall holder
- 'I don't know if I will be compensated if I have to leave.' - Market stall holder
- 'People like to know what is going on, when we would have to move etc. We are all just hanging on for info.' - Market stall holder

While some respondents felt that the upgrade of the centre would bring improvements to Elephant and Castle that would benefit business, such as increased footfall and improvements to the look and feel of the place generally.

- ‘A redevelopment of the whole site is needed - look at the redevelopment taking place in the vicinity.’ - Local outlet of national chain
- ‘Regeneration will improve the area; make it safer with less crime.’ - Market stall holder
- 'If the area changes for the better it will be good - more attractive venue’ - Independent trader
- ‘If I can stay, it will impact well as more people will come here.’ - Independent trader

While one business respondent expressed concern at changes to essence of Elephant and Castle, others felt that the current centre is currently crime-ridden and that leaseholders should be chosen more selectively in future.

- ‘Our main concern is keeping Elephant and Castle as diverse as it is today. The area is becoming a bit fancy, upmarket and expensive and this could kill our business "gentrification".’ - Local outlet of national chain
- ‘Be more "picky" on who is going to let the new shops - some undesirable lease holders/workers currently here!’- Independent trader
- ‘More security is needed here now and in future when the regeneration has happened.There are lots of thieves here.’ -Market stall holder

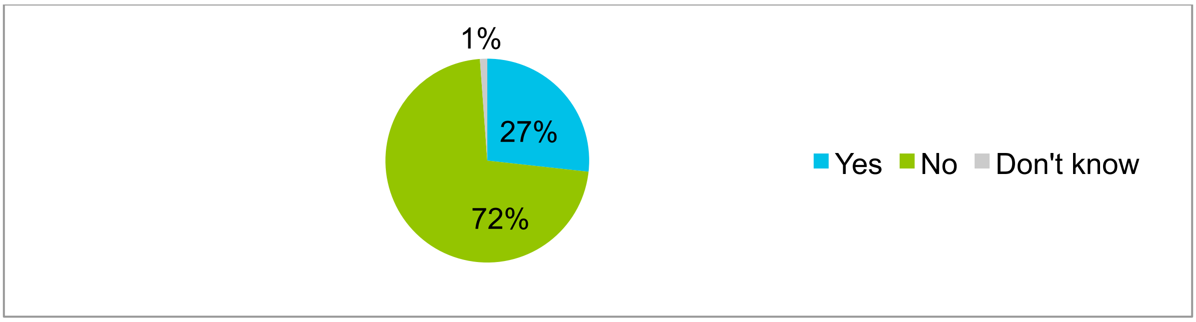
One responding leaseholder felt strongly that the decline of Elephant and Castle shopping centre has been accelerated by the developers in an attempt to make it a less viable business entity to enable the acceleration of their redevelopment.

- ‘There is no accountability in the centre, despite service charges for cleaners and security the centre is unclean and there is no enforcement, those that misbehave (including dealing/ using drugs within the malls) are not served with banning orders, as the landlord seeks to run the centre into the ground to ease the way for it to be demolished.’ - Independent trader

6.2.10 Participation in consultation activities

All respondents were then asked whether they have participated in any consultation activities organised over the last year by the developers, twenty seven percent of respondents stated that they have taken part in consultation activities- 72% stated that they had not. Just two of the 22 market stallholders interviewed had participated in the consultation.

Chart 6.16: Participation in consultation activities - Base (86)



Of those that had participated, 23 respondents in total,were asked what that involvement entailed. Eleven respondents stated that they had attended an open day held in the centre itself which detailed plans of the proposed plans to create a new town centre.

The following is a selection of their responses:

- “In July I went to the Open Door at the centre with the models and proposals etc.” -Local outlet of a national chain

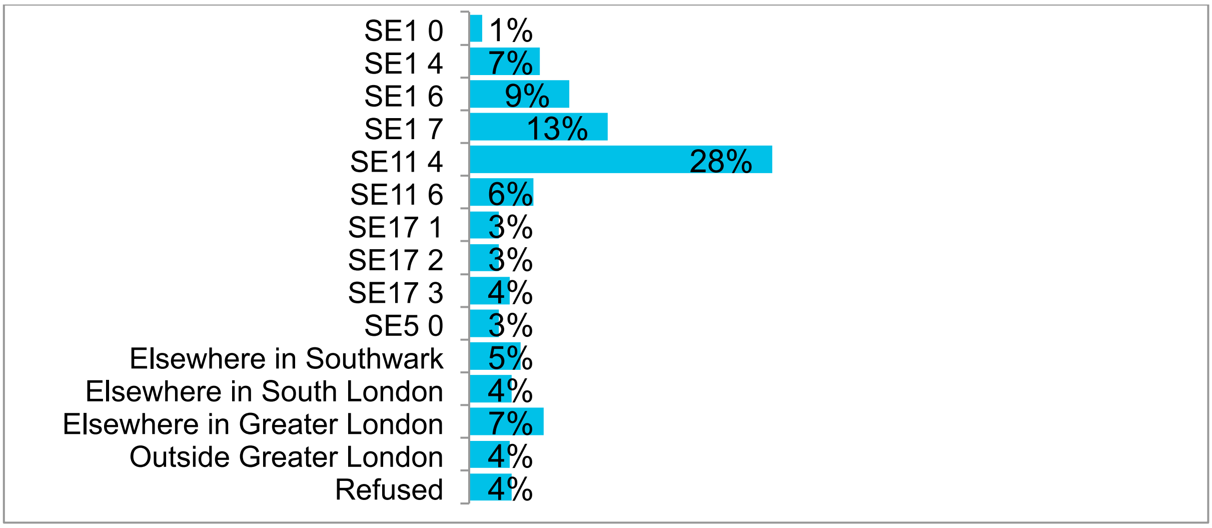
- "My colleagues went to the Open Day… Plan to turn it into a town centre" -Local outlet of a national chain
- "Meeting about what happens to the Latin Quarter to try and keep here" -Independent businesses- arches

Two respondents with units within the railway arches also directly mentioned attending specific meetings held to address the concerns of the Latin American community. Amongst business owners, participation is highest amongst the Latin American cohort with 30% (3) stating that they have been involved. 7% (1) Black/Black British owners stated that they had taken part as did one of the three White business owners who took part in the study.

6.3 On street Survey Results

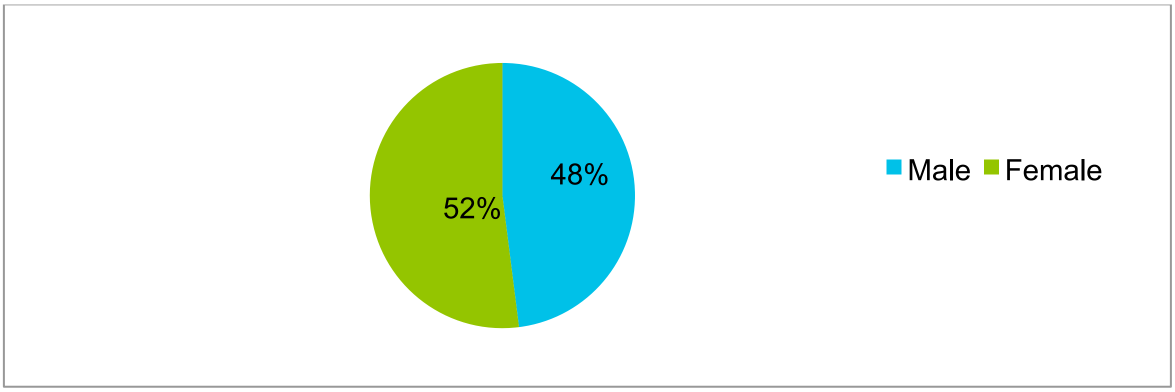
In total 502 on street interviews were conducted with users within Elephant and Castle shopping centre and the immediate surrounding market area. In order to understand the demographic breakdown of those using the site, all respondents were asked where they live. Seven in ten of those interviews (70%) stated that they reside in the London borough of Southwark, indicating that patronage of Elephant and castle shopping centre consists predominantly of those from the locality.

Chart 6.17: Respondent postcode/area – Base (502)



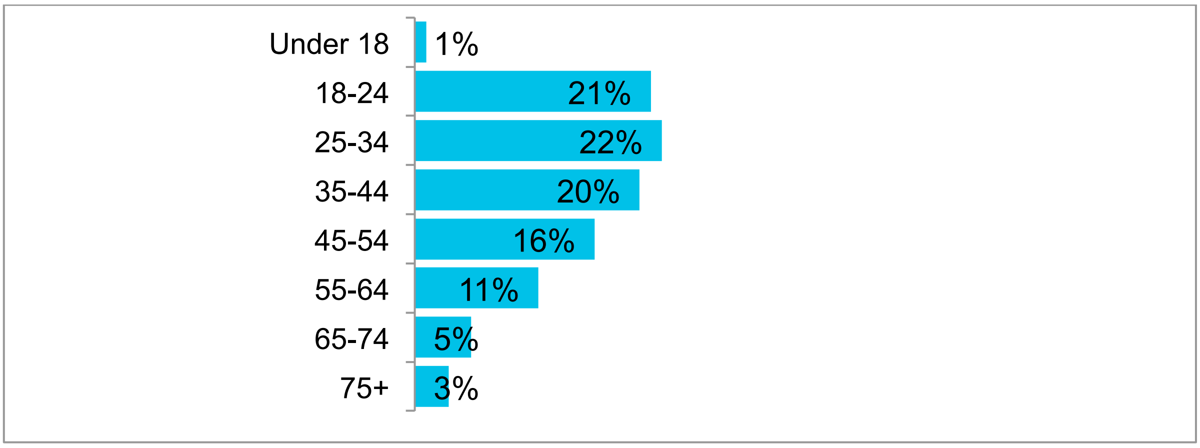
The sample consists of an almost even spread of male and female respondents, with 52% females and 48% males.

Chart 6.18: Gender breakdown of sample group- Base (499)



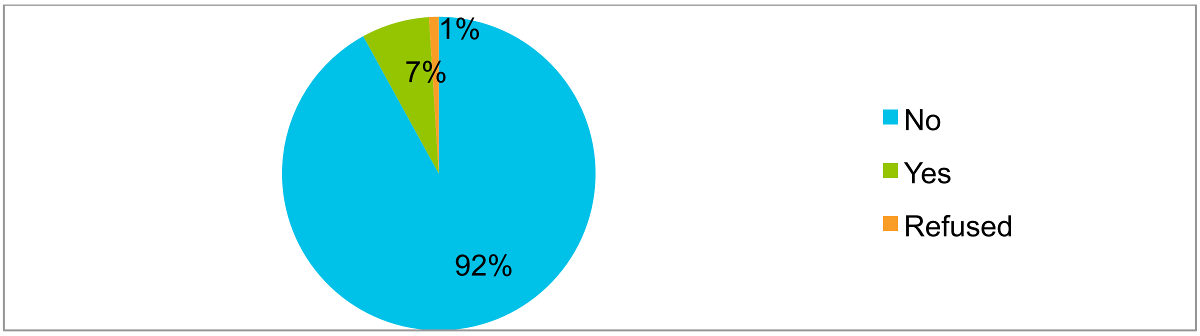
The age breakdown of the sample group indicates that people from a range of ages use Elephant and Castle shopping centre to some degree. Those aged over 65 account for 8% of all interviewed, and as such can be included as a sub group for analysis.

Chart 6.19: Age breakdown of sample group- Base (499)



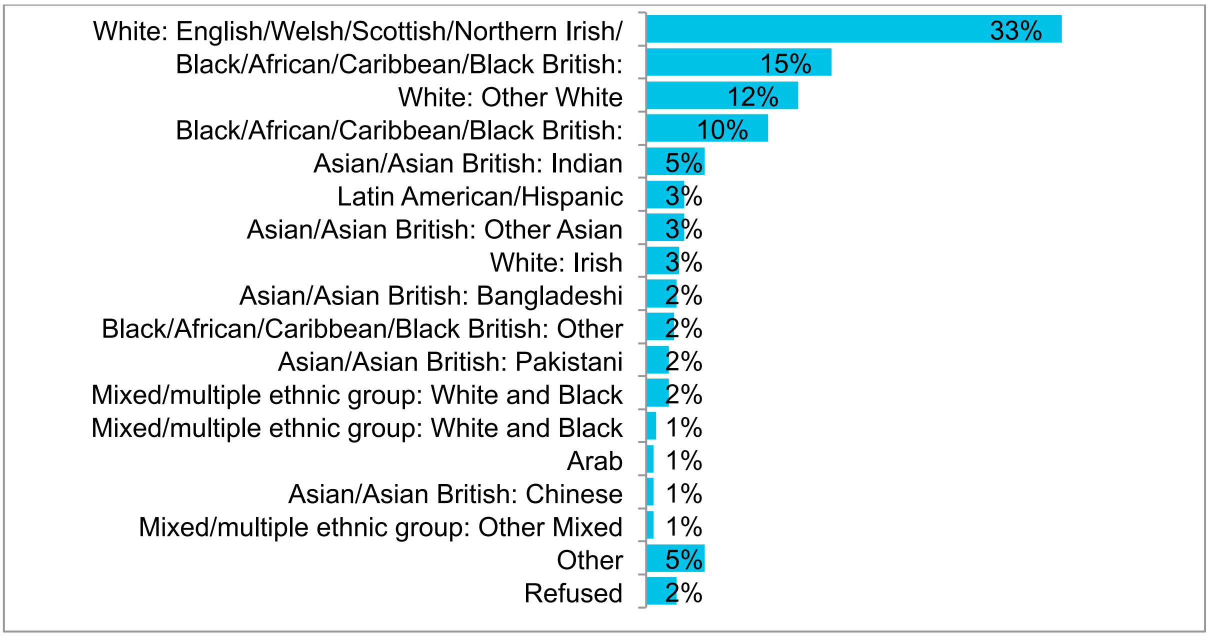
In order to understand more about the types of people using Elephant and Castle shopping centre all respondents were asked whether they consider themselves to have a disability – 7% of those interviewed stated that they do- constituting 36 people.

Chart 6.20: Disabilities within sample group- Base (499)



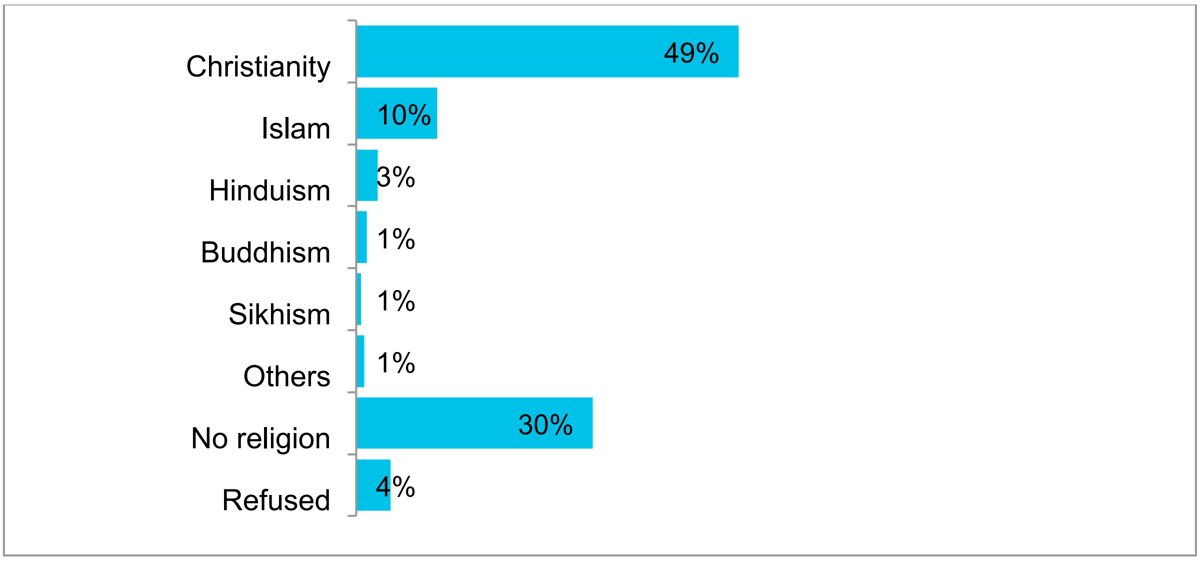
Similarly in order to understand more about the profile of those using Elephant and Castle shopping centre all respondents were asked what their ethnicity is. As shown in **Chart 6.21** the ethnic make-up of centre users is varied. Those from 'white' backgrounds make up 47% of the sample group.

Chart 6.21: Which of the following ethnic groups do you feel you belong to? - Base (502)



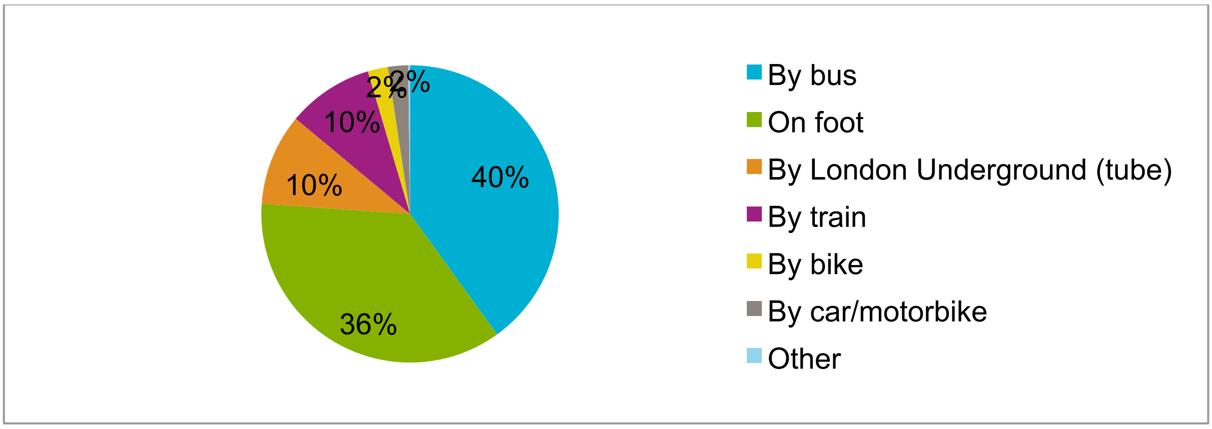
All respondents were asked what their religion was and as **Chart 6.21** shows just under half of those interviewed (49%) class themselves as Christian. Three in ten respondents stated that they have no religion.

Chart 6.22: What is your religion? - Base (502)



Respondents were also asked how they usually travel to Elephant and Castle Shopping centre- those that use more than one mode were asked to select the one they use for the longest duration on their journey. Modal choices reflect the local nature of the respondent group- as shown in **Chart 6.22*,*** the most used modes were bus (40% of respondents use this) and walking (36% of respondents travel there on foot). Unsurprisingly London Underground and Rail use is highest amongst those who live elsewhere in or outside Greater London.

Chart 6.23: Modes of travel used to get to Elephant and Castle Shopping Centre- Base (502)



Respondents were asked what the main purpose of their visit to Elephant and Castle on the day they were interviewed was, and the most commonly cited purpose was shopping in the centre itself.

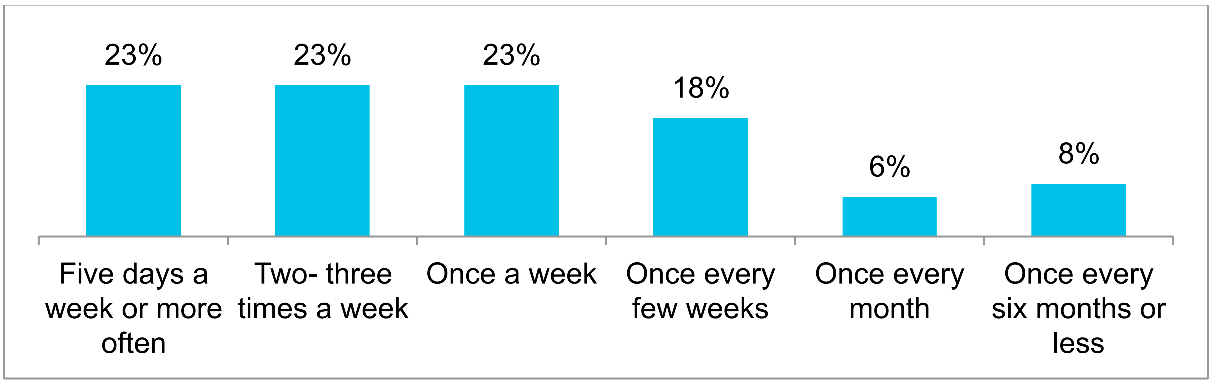
Table 6.12: Purpose of visit to Elephant and Castle - Base (502)

Purpose of visit	%
Shopping within the centre	67%
I work in the centre (including Hannibal House)	6%
Meet friends	5%
To access the train station	5%

Eat at a restaurant / café /take-away	4%
Shopping at the market	4%
Visit hairdresser / other service	3%
Bingo	1%
I attend the London College of Communication	1%
Bowling	1%
Other	5%
Base:	(502)

All respondents were asked how often they visit Elephant and Castle shopping Centre - 68% of respondents visit the centre at last once a week, and almost a quarter (23%) visit it on five or more days a week.

Chart 6.24: Visit frequency Elephant and Castle Shopping Centre- Base (501)



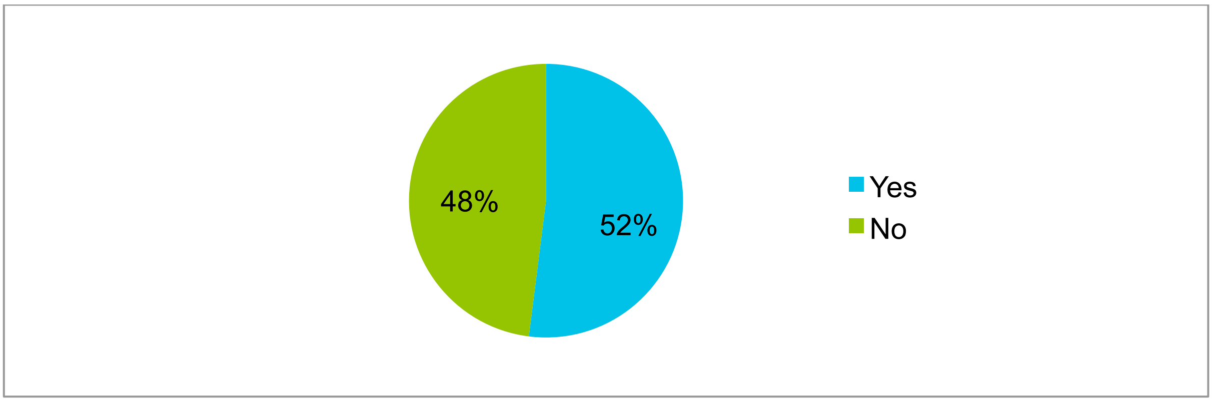
Elephant and Castle is rated most positively by customers on the attribute of ‘affordability of goods and services’, with 74% rating it as ‘good’ or ‘very good’ on this attribute. Elephant and Castle is also rated well ‘location/ease of getting here’ with 73% rating it as ‘good’ or ‘very good’ on this attribute.

There is little significant difference in the overall ratings of Elephant and Castle when we analyse the response by age. However those aged 65 years and over rate Elephant and Castle more positively than those aged 64 years and under on the attribute *‘general feeling of being welcome/safe’:* 81% of those over 65 rated it ‘Good or very good’ vs. 65% of those under 65 - a statistically significant difference at 95% confidence interval).

Chart 6.25: Rating of Elephant and Castle on various attributes (ranked on 'very good' rating)

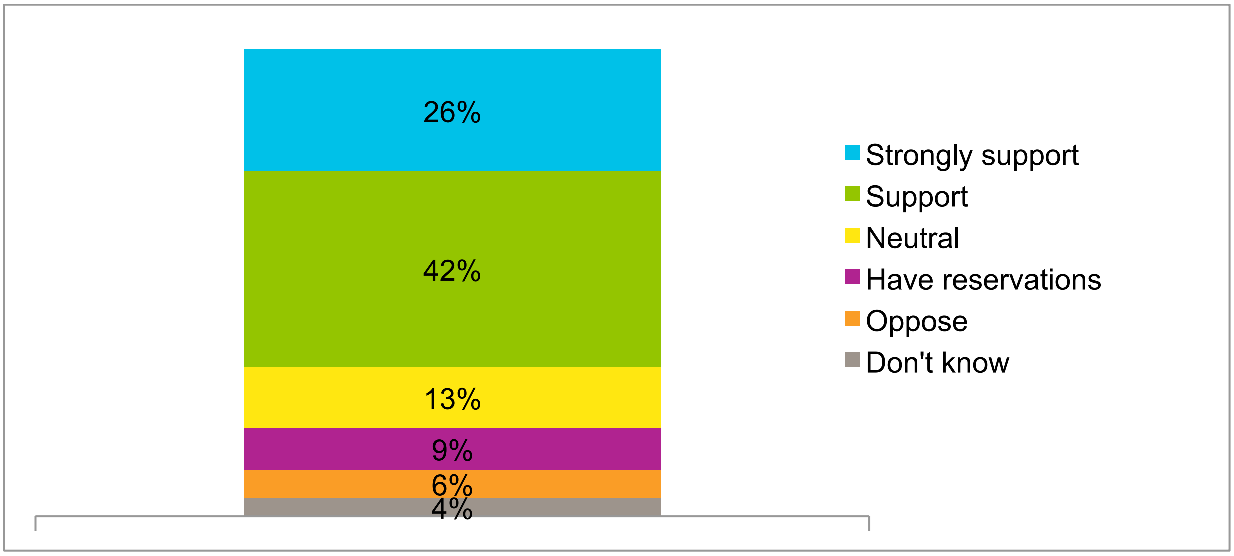
Fifty two percent of respondents were aware of the redevelopment. Those aged over 65 are significantly more likely to be aware of the proposed redevelopment- 69% of this group were aware vs. 50% of those aged 64 and under (at 95% confidence interval). Non-white respondents were significantly less likely to be aware of the redevelopment of the site (42% vs. 63% awareness amongst white respondent group).

Chart 6.26: Awareness of redevelopment – Base (502)



A quarter (26%) of respondents stated that they 'strongly support' the redevelopment, and a further 42% 'support' the plan. Six percent of respondents oppose the planned redevelopment. There are no significant differences in level of support for redevelopment proposals within break age and ethnicity breaks.

Chart 6.27: Extent of support of redevelopment proposals – Base (502)



Respondents were then asked to expand on why they support/oppose or have no particular feelings towards the regeneration of Elephant and Castle shopping centre. Analysis of reasons given by those who ‘strongly support’ or ‘support’ the regeneration show that while ‘in need of modernisation and improvement’ (47% of responses) and ‘more shops/more shops are needed/ will attract people’ (34% of responses) are the most cited reasons for supporting the regeneration. However those who support the regeneration have some concerns – 21% of responses consist of sentiments around ‘concerned about impact on local people/community’ and 8% of responses were related to respondents wanting to know more about the developer’s intentions.

Table 6.13: Reasons given by those in support of regeneration (multiple response) - Base (382)

Reason for strong support/support of regeneration	%
In need of modernisation and improvement	47%
More shops/more shops are needed/ will attract people	34%
More jobs/greater prosperity/more opportunity	25%
Generally positive/ good for the area	23%
Concerned about impact on local people/community	21%
Good for local people	13%
Worried that locals/traders will be pushed out	12%
Need to know more about the developers intentions	8%
Improve housing stock	7%
Concerned about impact on affordable housing	7%
Concerned that prices will increase/want to retain affordable shops	5%
Worried about impact on independent/ cultural shops don’t want to lose them	4%
Don't see need for development- fine as is	3%
Positive about new campus for LCC	3%
People should be consulted	2%

Reason for strong support/support of regeneration	%
Want to know more about green agenda and provision for green space	1%
Other	1%
Base:	(382)

Again (35%) those with reservations about the redevelopment state that the area is in need of modernisation and improvement, however there are concerns about prices will increase as shops go more upmarket (18% of responses). Similarly 10% of responses consist of concern that there will be an impact on affordable housing and a further 29% are worried about the impact on independent/ cultural shops.

Table 6.14: Reasons given by those with reservations about the regeneration (multiple response) - Base (40)

Reason given by those who have 'reservations' about the regeneration	%
In need of modernisation and improvement	35%
Concerned that prices will increase/want to retain affordable shops	18%
Concerned about impact on affordable housing	10%
Worried about impact on independent/ cultural shops don't want to lose them	10%
Positive about new campus for LCC	10%
More jobs/greater prosperity/more opportunity	8%
More shops/more shops are needed will attract people	8%
Improve housing stock	8%
Concerned about impact on local people/community	8%
Good for local people	5%
Worried that locals/traders will be pushed out	5%
Don't see need for development- fine as is	5%
Neutral sentiment	5%
Generally positive/ good for the area	3%
People should be consulted	2%
Base:	(40)

Twenty-eight respondents stated that they oppose the regeneration of Elephant and Castle Shopping centre – due to this low base we cannot use percentages to analyse their response. 12 of these respondents stated that the centre is in need of modernisation and redevelopment. However 5 respondents were concerned about increasing prices as a result of changes to the area and 4 respondents felt that there is no need for the redevelopment and as such the centre is fine as it is.

Table 6.15: Reasons given by those who that they oppose the regeneration (multiple response) - Base (28)

Reasons given by those who 'oppose' the regeneration	(N)
In need of modernisation and improvement	12
Concerned that prices will increase/want to retain affordable shops	5
More shops/more shops are needed will attract people	4
Don't see need for development- fine as is	4
Concerned about impact on local people/community	3
Good for local people	3
More jobs/greater prosperity/more opportunity	2
Concerned about impact on affordable housing	2
Improve housing stock	2
Worried that locals/traders will be pushed out	2
Neutral sentiment	2
Worried about impact on independent/ cultural shops don't want to lose them	2
Generally positive/ good for the area	1
Need to know more about the developers intentions	1
Want to know more about green agenda and provision for green space	1
Other	1
Base:	(28)

All respondents were then asked what the impacts will be on the local communicate in Elephant and Castle and just over a third (38%) of responses were from respondents who felt that the regeneration will have positive impact on for the community and make Elephant and Castle a nicer place to visit. Three in ten (31%) of responses were related to the regeneration delivering more jobs/prosperity/opportunities/facilities for the community in Elephant and Castle. Concern about the perception that prices will increase and that locals will lose out as a result of the regeneration also generated 13% of responses apiece.

Table 6.16: Impacts of the regeneration on the local community (multiple response) - Base (494)

Impact on the local community	%
Positive impact for local people/make place nicer to visit	38%
More jobs/prosperity/opportunities/facilities	31%
Prices will go up	13%

Locals will lose out	13%
More businesses/shops in the area	8%
Change clientele in area/gentrification	7%
Small shops will be pushed out	5%
Neutral sentiment	4%
Concerned about impact on transport- traffic/access to PT	2%
Generally positive	2%
Will become more polluted/noisy concerns about population growth	2%
Concerned about what happens to facilities/businesses in interim/ need to consult	2%
It will be a safer place	2%
Negative (unspecified)	1%
Base:	(494)

Non-white respondents are significantly more likely (at 99% confidence interval) to state that the local community will benefit from more jobs, prosperity and opportunities as a result of the regeneration than those from white backgrounds (37% of non- white respondents state this vs. 22% of white respondents). However white respondents are significantly more likely to express concerns about changing the character of Elephant Castle and the move towards gentrification (13% of them cited this vs. 3% of non-white respondents).

Table 6.17: Impacts of the regeneration on the local community (multiple response) - Non-white respondent Base (195), White respondent Base (175)

Impact on the local community	Non white	White
More jobs/prosperity/opportunities/facilities	37%	22%
Positive impact for local people/make place nicer to visit	37%	40%
Prices will go up	11%	15%
Locals will lose out	10%	16%
More businesses/shops in the area	8%	7%
Change clientele in area/gentrification	3%	13%
Small shops will be pushed out	5%	5%
Concerned about impact on transport- traffic/access to PT	2%	2%
Neutral sentiment	3%	5%
Generally positive	3%	2%
Crime will increase	0%	1%

Will become more polluted/noisy concerns about population growth	2%	2%
Negative (unspecified)	0%	2%
Concerned about what happens to facilities/businesses in interim/ need to consult	2%	2%
It will be a safer place	2%	3%
Base:	(195)	(175)

N.B. Green shading denotes statistically significantly higher proportion vs. other sample group at a minimum 95% confidence interval

All respondents were asked to select what facilities they use within the shopping centre and then asked whether they have any concerns about the impact of the new development might be on the services they use. Half (52%) of those who use the bingo hall are concerned about the impact of the regeneration upon it, as are 30% of those who use the bowling alley. A fifth (22%) of those who use community services/charities are concerned about the impact up on them.

Table 6.18: Services used and perceived concern regarding potential impact of redevelopment- Base size per facilities shown in table

Facilities used:	Base:	% concerned about impact
Bingo hall	(25)	52%
Bowling alley	(60)	30%
Restaurants or cafes	(259)	28%
Community services/charities	(129)	22%
Other shop	(53)	21%
Food shops (cultural foods)	(268)	19%
Budget shops	(192)	19%
Clothes shops	(201)	19%
Food shops (supermarkets)	(439)	12%
Culturally-specific shops or services	(156)	9%
Market stalls	(257)	9%

Respondents that expressed a level of concern regarding the impact of the redevelopment on the facility/facilities they use were asked why this was. Twenty six percent of the responses from those who were concerned about the impact stated that they felt that rents will be too high for current (independent) traders and were concerned that those traders may be forced out of the area. Twenty four percent of respondents were worried that independent traders would lose out to chain stores and thus prices will increase for the consumer.

Eleven percent of responses consisted of concerns about changing of the character of Elephant and Castle and whether the regeneration will impact on cultural diversity, a further 9% of responses expressed concern regarding the gentrification of the area which could push locals out.

Table 6.19: Reason given for expressed concern regarding impact of regeneration on facilities used (multiple response) - Base (167)

Reason given for expressed concern	%
Rents will be too high for current traders/they will be forced out	26%
Loss of independent traders to chains/more expensive traders	24%
Hope that it stay/it will close (unspecified)	13%
Concerned about specific loss of shops/facilities e.g. bingo/bowling	11%
Concerned about change of the character of Elephant and Castle/impact on diversity	11%
Gentrification- Could become an area for the affluent and drive people out	9%
Market could close	8%
Loss of culturally specific amenities/shops	6%
Loss of supermarket/food shops	5%
Loss of jobs	2%
Impact of closure- businesses will not survive in the interim	2%
Keep it the same	1%
Base:	(167)

Respondents were then asked what they felt the main effects the proposed plans to develop a new town centre at Elephant & Castle would be on the local community.

Thirty seven percent of responses indicated that the new town centre would have a positive impact on the local community, with a further 17% of responses indicating that the introduction of a better range of shops and facilities will be a boon and will attract more people to Elephant and Castle.

However 12% of responses consist of more negative sentiments regarding concern about the cultural implications/gentrification/people being pushed out and a further 10% are related to changing the character of the place/loss of community spirit. Eleven percent of responses relate to concerns about increasing rents for businesses which will help big brand stores but may lead to increased prices for consumers. There are no significant differences in the response of white and non-white respondents. Response base for over 65 is too low at 26 responses.

Table 6.20: Impact of development of new town centre on local community (multiple response) - Base (384)

Impact on community	%
Positive impact on local community (General)	37%
Better shops and facilities will be good/attract visitors	17%
Negative cultural implications/gentrification/people being pushed out	12%
Prices/Rents will increase/helps big business	11%
Changing the character of the place/loss of community spirit	10%

More jobs/opportunities/increased prosperity	10%
Closure of facilities in interim/disruption	9%
Loss of small businesses	4%
Mixed response	4%
Loss of culturally specific amenities	3%
Increased population	3%
No impact/ no community here	2%
Increased traffic	2%
New housing	2%
Safer place to be	1%
Loss of jobs	1%
Neutral response	1%
Improved environment	1%
Change to pedestrian access	1%
Base:	(384)

All respondents were then asked what retail and leisure facilities they would like to see should the redevelopment go ahead. Provision of food shops in the new development was the most cited 'want' for the new development with 66% of responses consisting of 'supermarkets' and 55% of responses consisting of 'cultural food shops'. Eight percent of respondents stated that they would like to see the same facilities in the new development that are in the existing centre.

Table 6.21: what type of retail or leisure services would you like to see incorporated in new development (multiple response) - Base (496)

Retail/leisure services in new development	%
Food shops (supermarkets)	66%
Food shops (cultural foods)	55%
Cafes and restaurants	50%
High street shops/branded chain stores	47%
Department stores	45%
Market style- retail.	45%
Cultural facilities	38%
Service retail (hairdressers, dry cleaners, etc.)	38%
Small-scale convenience stores	31%
Bowling alley	22%

Bingo	12%
Keep it the same/ what is there now	8%
Community facilities including library, youth centre, leisure centre	2%
Cinema	2%
Independent shops	2%
Shops (other)	2%
Budget/cheap shops	1%
Clothes shops	1%
Gym	1%
Base:	(496)

7 APPRAISAL OF EQUALITY IMPACTS

7.1 Introduction

The appraisal considers the potential impacts on affected people sharing protected characteristics arising from the redevelopment of the Elephant and Castle Shopping Centre Area.

The appraisal addresses impacts in relation to key themes which have been identified as relevant. Key themes have been identified through policy review, review of baseline evidence and consultation evidence.

7.2 Business

A diverse range of business types operate within the shopping centre area and surrounding area, including the market stalls and the arches, as well as Hannibal House. Almost half of those interviewed were independent shops/businesses, a quarter were market stalls, and a slightly lower number were local outlets of a national chain. The response shows that the majority of businesses classified themselves as the main lease or stall license holder. In this regard, the market area tends to have more male than female stall license holders, while businesses within the shopping centre have more female leaseholders than male.

In terms of ethnic composition of business types in Elephant and Castle, there are noticeable variations. The data suggests that the market stall area is comprised more of Black African and Caribbean and Asian stallholders than those from other BME groups. Black African and Caribbean stallholders account for 7, and Asian stallholders constitute 5 of the 14 respondents who describe themselves as market stall license holders and have premises within the market area. In comparison, all (100%) of Latin American respondents operate an independent shop or business (versus market stalls). Notably, Latin American business proprietors were most represented within the premises classified as the Arches within the study area with 6 of the 10 of these business proprietors or managers having their premises there, and as such are the main and sub-lease holders for these premises.

Responses gathered from the survey show that, should relocation be required, that the majority of business owners wish to relocate their businesses within the Elephant and Castle area; however, it is considered that the successful relocation of existing businesses will depend, in part, on the flexibility of individual businesses and the services that they offer, as well as the ability and willingness of business owners to engage in the redevelopment process.

7.2.1 Business owners' engagement in the redevelopment process

As highlighted above, the engagement of business owners during the re-development process is a key component to the successful continuation or relocation of businesses. In this context, an issue identified through the survey is that BME business owners may be less willing or able to engage in the redevelopment process relative to White business owners. The majority of respondents from each ethnic group had been aware of the planned redevelopment of the centre (with the exception of Black African and Caribbean business owners, where slightly less (93%) were aware of the redevelopment plans). In contrast however, a much smaller number had actively participated in consultation exercises. Although 33% of White business owners and 30% of Latin Americans had participated in consultation exercises; only 7% of Black African and Caribbean Owners had participated, and business owners from Asian and Mixed ethnicity backgrounds had not participated at all.

7.2.2 Potential implications for businesses as a result of the redevelopment

Given that BME owners appear to have been less forthcoming than white owners in engaging with the redevelopment, it is considered that BME owners within the site may be less well prepared to identify alternative premises for the continuation of their business in comparison to white owners. Additionally, survey results have identified that a higher proportion of BME business owners felt that the majority of their customers are from the local community in comparison to white owners.

Just under half of businesses 'strongly agreed' that their business serves the needs of those with a shared ethnic background; which highlights the importance of identifying suitable local alternative premises for business owners so as to maintain customer bases. This was particularly important for a number of BME groups. In particular, 90% of Latin Americans, and 67% of Black African and Caribbean business owners 'agreed' or 'strongly agreed' that their business served the needs of those with a shared ethnic background. However it should be noted that similar services and accommodation are available along the Walworth Road in close proximity to the existing centre.

Several common issues of concern were raised by both white and BME business owners through responses to the business survey. Currently, 14% of survey respondents rate the existing Elephant and Castle shopping centre as ‘good’ with regard to competitive rental rates of commercial units; 39% rate it as ‘average’, while 21% rate it as ‘very poor’. In this context, many respondents were unsure about the future affordability of the business units to be provided through the redevelopment scheme. In particular, qualitative interview answers suggested that there was uncertainty among the business owners in terms of the cost of commercial rents for the new units and the implications this would have for being able to continue afford to run their business in the centre.

Many business owners, particularly those identifying as Black African or Black Caribbean, expressed worry and uncertainty about the future of their businesses. A large proportion of respondents felt that they have received inadequate information about the redevelopment scheme. For instance, answers indicated concern about; when re-development would start, how long it would take, and what effect this would have on business costs.

Typically, responses from the Latin American community suggest that business owners are confident in the likelihood of successful relocation within the new development; however other BME groups – particularly Asian and Black African and Caribbean business owners are much less confident in this respect. Although the site developers, Delancy, have confirmed that the redevelopment of the area should not result in a net loss of commercial floor-space within the scheme area, AECOM considers that the redevelopment may impinge negatively on the ability of BME businesses owners to run their businesses successfully. This is due to several factors, including: that commercial rents in the redeveloped centre are likely to be higher than at present; there may be less suitable units for the types of businesses they operate (especially market stalls); and they may be less engaged in the redevelopment process.

The business survey response confirms that there is a strong desire among business owners across all ethnic groups to continue operating their businesses following the redevelopment of the shopping centre. However, as discussed the likelihood of businesses having the opportunity to return to the Elephant and Castle Shopping Centre may be limited due to affordability issues (almost half of responses by business rated their confidence of relocating within the new development as ‘not at all’ confident or ‘not very’ confident). The assumption is therefore that, with the exception of the London College of Communication (which is being provided a new campus as part of the wider Elephant and Castle Regeneration scheme) - it is likely that the majority of existing businesses within the site will be relocated outside of the shopping centre redevelopment area.

7.3 Goods and services

The Shopping Centre comprises a range of culturally diverse shops that provide convenience goods and services that cater to a range of BME groups, in addition to serving the general public. As described in section 7.2 above, the redevelopment will result in the displacement of BME owned businesses (who comprise the majority of SME businesses currently operating in the centre). The business survey response indicates that BME businesses, and in particular Asian, Black African/Caribbean and Latin American businesses, provide goods or services that serve the needs of people from a shared ethnic background. Responses to the business survey also highlight the challenges that independent shops and market stalls will face to retain their existing customer base should they be required to moved outside of Elephant & Castle, particularly for businesses that have enjoyed a long tenure at their current location and are more reliant on repeat customers for business viability.

The on-street survey results suggest that Asian/Asian British customers are most likely to use culturally specific shops or services in the centre and at the market. Similarly Asian/Asian British and Black African and Caribbean customers are more likely to use culturally specific food shops. Latin American customers also currently feel well catered to with regard to culturally specific goods and services in the existing Shopping Centre. These findings suggest that the redevelopment may potentially impact on BME groups who benefit from the provision of specialist goods and services in the centre. However, the local area has a diverse mix of shops that provide a wide range of similar goods and services. The redeveloped shopping centre site will also provide easy walking access to shopping along Walworth Road.

Although the developers, Delancy, have confirmed that the area’s redevelopment should not result in an overall loss of commercial retail floor space; on the basis that many existing businesses may have to relocate, and some BME-owned businesses that provide convenience goods and services may cease to operate as a result of the redevelopment, AECOM considers that on this basis, the site as a hub for BME goods, services and cultural activities risks becoming lost. This could potentially have **negative**

equality effects on the local BME community, in terms of access to culturally specific services at the redeveloped site and also on community cohesion and sense of place.

7.4 Facilities

The redevelopment proposes to replace the existing shopping centre with a new town centre, which will include additional restaurant and leisure opportunities and a new university campus for London College of Communication with exhibition and cultural space for general community use. This will benefit the wider local community who will have access to these new facilities, although it is less certain the extent to which BME, and in particular, Latin American/Hispanic, businesses or their customers will benefit from these changes. Although the proposed redevelopment will provide cultural benefits for different groups, there is a risk that it may also result in the loss of existing culturally specific businesses which may limit benefits for the local BME community. On the other hand, the new mix of businesses may attract a more diverse range of shops with the capacity to appeal to the diverse local community as well as others visiting the shopping centre and wider Opportunity Area.

7.5 Other potential benefits of the redevelopment

The Equality Analysis has also identified a number of potential benefits of the redevelopment, which are expected to affect people across a broader range of protected characteristic groups. The potential benefits of the redevelopment have been identified as:

- Improved and more diverse retail offer
- Improved transport connections i.e. new Tube station
- Improved image for Elephant and Castle
- Higher property prices
- More sustainable centre from new housing and improved transport connection
- Improved sustainability for other local shops e.g. in Walworth Road resulting from less convenience outlets when the current Centre closes.
- new employment and training opportunities for local people;
- provision of new housing; and
- improved accessibility of public realm, streetscape and safety.

The redevelopment is expected to create 5,000 new jobs over the period 2011-26, with significant investments in local employment and training including approximately 100 NVQs/apprenticeships for local people**.** Through providing new business and retail space, the redevelopment is expected to create **new employment opportunities for local people,** totalling 1,000 jobs in the completed development. These new employment and training opportunities are likely to benefit all working-age people, but particularly those with relatively limited skills sets. In order to ensure that this benefit is realised, it will be important that the Council and its partners provide targeted skills training and apprenticeships, and appropriately target the promotion of new job opportunities.

The redevelopment will result in the **provision of housing within the site**, including a target for a net gain of 4,000 new homes, including affordable homes. BME Groups (Black African, African Caribbean and Latin American / Hispanic and Asian), single-parent households, and children in low-income families, should be able to share in this benefit.

The redevelopment is also expected to result in **improvements to the accessibility of the public realm, streetscape and safety** through: improvements in the underground station (making access and egress to platforms faster); linking the new centre to the Elephant and Castle mainline station more efficiently (thereby improving transport accessibility); creating a new public square in the heart of the town centre (thereby improving the pedestrian environment and creating a place of social exchange) and connecting streets to the north and south of the new development on the Elephant Park and also those to the east and west by the railway viaduct, shopping centre and Elephant Road (thereby improving overall accessibility and helping to encourage walking and cycling in the area). These improvements will particularly benefit older people, disabled people, young people, and women and children.

8 RECOMMENDATIONS AND CONCLUSION

8.1 Introduction

The results of this Equality Analysis have highlighted a number of recommendations to strengthen, secure or enhance positive equality impacts and to mitigate for potential negative equality impacts. It also sets out conclusions on the overall impact of the shopping centre redevelopment proposals for equality. This is on the basis that the precise nature of the redevelopment scheme has not been identified and ongoing equalities assessment will be carried out on the detailed design of the project.

8.2 Recommendations

8.2.1 Business and employment

- In the instance that a compulsory purchase order (CPO) is required, Southwark Council and the developers should identify whether additional or differing forms of support should be offered to businesses identified as poorly equipped to develop revised business plans or to find suitable alternative premises or employment.
- The current regeneration plans being delivered by Lend Lease and other developers aim to deliver retail space for about 50 shops, of which 10% will be at affordable prices. The lack of affordable retail space in the Elephant & Castle area is a major concern amongst current SME business owners (the large majority of whom are BME business owners), and will limit the opportunities for relocation in the area. For existing leaseholder businesses, the developers should develop a relocation strategy alongside a database of alternative opportunities for relocation within the existing area, with the objective of enabling businesses who wish to do so to relocate to alternative premises in the Elephant & Castle area. It is noted that Delancey is the developer of 50 New Kent Road which contains 9 retail units which will be practically completed in late 2016 and could provide alternative accommodation for existing tenants. The section 106 agreement for the development stipulates that three of the retail units are to be provided as affordable units and the remaining 6 units are to be offered on market terms on a first refusal basis to existing shopping centre tenants.
- It is recommended that an independent panel be appointed to provide advice on matters relating to relocation and business support. Existing shopping centre tenants should be involved in the selection and appointment of panel members.
- The developers should develop a transition strategy that will seek to ensure that the relocation of existing leaseholder businesses will not negatively impact on the vibrancy and safety of the centre.
- The developers and the London Borough of Southwark should continue to signpost existing business owners and employees to relevant business support and/or training providers to increase their capabilities to effectively respond to the changes resulting from the proposed redevelopment.
- The developers should undertake a baseline study and subsequent ongoing monitoring of the national multipliers at key points in the progression of the planning application and construction, including equality and diversity monitoring that includes employee numbers.

8.2.2 Goods, services and facilities

- Planned support to help existing businesses find alternative locations or premises will be important to ensure that businesses' existing customer bases with shared equality characteristics are able to continue to access convenience goods and services. Marketing and advertising advice is likely to provide an important component of this support so that businesses are able to inform existing and new customers of their planned relocation.

- The developers, in planning their approach to letting business premises at the redeveloped site, should include explicit measures to encourage equality of opportunity, including where possible providing suitable and affordable workspace for relocated businesses in the redeveloped shopping centre or in the local area. These measures could include the promotion of diverse ownership of businesses at the site as well as measures to encourage services and activities that meet the cultural aspirations of the diverse local community.

8.2.3 Wide-ranging consultation and enabling participation

- The developers should, as a matter of priority, publish and regularly update information relating to the potential relocation of businesses on its website and via the distribution of print versions. This should include information on the timescales and procedures involved (including the anticipated timetable for the CPO; the procedure and timescales for property acquisition; the likely date by which premises will need to be vacated; the likely date around which new units will be allocated; and the phasing of the development). This would help widen awareness amongst affected members of the community of the timescales and procedures involved, and opportunities for them to express their views on the redevelopment and to make their own plans.
- Prior to a CPO decision, Southwark Council and relevant partners should develop a renewed strategy for on-going stakeholder engagement and ensure that this is widely distributed (including on-line). The strategy should be quickly revised following the CPO decision being made.
- The strategy should set out ways in which there will be engagement with affected groups, including existing shop owners, employees on the site, and other affected business owners and local residents in the area. The strategy should take account of the differences in levels of understanding/engagement among the business owners and employees, as well as the implications these can have in terms of creating potential barriers to their take-up of available support and development of their own plans.
- Southwark Council and its partners should together review the approaches to date and agree on a forward strategy, including any need for additional inputs or changes of approach that may encourage greater engagement by BME (Black African/British, Latin American/Hispanic, and Asian) businesses towards planning post-redevelopment.

8.3 **Conclusion**

The Equality Analysis has identified a number of positive equality impacts likely to arise from the proposed redevelopment of the Elephant and Castle shopping centre. There include: new employment and training opportunities; provision of new housing, including affordable housing; and improved and more accessible public realm, streetscape and transport. People sharing protected characteristics are likely to be able to share in these benefits. Southwark Council and the developers can maximise this sharing of benefits through explicit measures in their approach to future letting of premises (and overall site management) to encourage equal opportunities.

The Equality Analysis also identified positive support for the proposed redevelopment by both customers and the businesses of the shopping centre. The majority (68%) of customers support the proposal to redevelop the shopping centre, and all four of the major objectives of the project are seen as significant benefits by more than 64% of all of the businesses. Customers indicated that the shopping centre is in need of modernisation and improvement and that redevelopment would be generally positive for the local area. For businesses, the proposition to create a new campus for the London College of Communication and improved transport links was cited as key benefits of the scheme. The provision of affordable housing was also identified as potentially having a significant benefit to businesses and residents in the area.

There is however the potential for negative equality impacts in terms of affordability and availability of retail space in the area and changes in access to goods and services, with BME-owned business and employees (particularly amongst people of Latin American, Black African, Black Caribbean and Asian origin) identified as those most vulnerable to the effects of the redevelopment and associated loss of the use of existing business premises.

Should the compulsory purchase order (CPO) be required, it can be anticipated that a proportion of BME owned businesses will be forced to close, resulting in job losses among people in BME Groups, or will be required to relocate to areas outside of Elephant Castle and, potentially the borough, due to the limited number of affordable retail spaces that will be available at the redeveloped site and a lack of affordable retail spaces in the surrounding. This would have indirect negative implications in terms of reducing access to convenience goods and services currently provided by the diverse independent shops and market stalls at the site, affecting people of Latin American, Black African, Black Caribbean and Asian backgrounds in particular. To help mitigate these potential negative equality impacts, Southwark Council and the developers should give full consideration to appropriate mitigation measures in relation to these potential negative equality impacts prior to the CPO decision.

APPENDIX A: SCOPING TABLE

Impact	Potential equality effects
Impacts on existing **shops and businesses** at existing sites due to site closure and redevelopment	Affected shops and businesses may experience closure, financial or other barriers to re-open at site or in wider area, temporary effects until can relocate. Equality effects may be experienced where the pattern of affected business owners or employees affects a single race, or other patterns in terms of protected characteristics, including effects of changes to clustering of businesses offering services to a common customer set.
Impacts on **market stall operators** due to site closure and redevelopment	Affected market stallholders may experience temporary or permanent closure or disruption to business operations, financial or other barriers to re-opening at the new site or in the wider immediate area. Equality effects may be experienced where the pattern of affected business owners or employees affects a single race, or share other protected characteristics.
Impacts on **employees** of existing businesses due to site closure and redevelopment	Employees/self-employed workers at affected businesses and organisations may experience temporary or permanent loss of income and/or employment until relocated and/or where employer closes/downsizes/relocates elsewhere. Equality effects may be experienced where the pattern of effected employees affects a single race disproportionally, or have other protected characteristics which make them more sensitive than others to the effects of the redevelopment.
Impacts on **customers** of existing shops/ businesses at existing site due to site closure and redevelopment	The loss of existing shops, market stalls and business premises providing the current mix of goods, services and facilities at the site will affect customers/user of these services. Equality effects may be experienced where there are patterns in terms of affected customers and their having protected characteristics. The redevelopment will bring a different mix of goods, services and facilities at the site, with the potential for a mix of positive and negative effects for groups, possibly patterned in relation to protected characteristics. The effects may include changes to access to culturally-specific goods and services, associated sense of belonging and cultural connections.
Impacts on users of particular facilities, including the bingo club, bowling club, Coronet venue, passport interview office, the Language centre, and the London School of Management and Science.	The closure (or relocation) of the bingo hall, bowling hall, Coronet mixed entertainment venue, passport interview office, the English language centre, the college for management and science, and other large facilities at the site may particularly affect users, particularly where there are limited comparable alternatives within a reasonable travel distance. There are also two charities that provide help to those suffering from the effects of crime and young people affected by strokes. Closure/relocation of these may give rise to health inequalities in those with protected characteristics, for instance BAME groups or young people. Where usage patterns reflect patterns in protected characteristics this may give rise to equality effects which may include physical and mental health inequalities.
Sharing of benefits of improved **open space**	The improved open space of the proposed redevelopment is likely to bring improvements in feelings of safety, actual safety and security, inclusive access and access to open space. Disabled people are likely to particularly benefit from inclusive access improvements, enabling them to share the benefits (such as physical and mental health benefits) of the overall redevelopment. Other groups may also particularly benefit from access, safety and security improvements, in relation to needs /priorities associated with their protected characteristics.
Sharing of benefits – new employment, training	The redevelopment of the shopping centre brings with it the opportunity for new employment and associated training. The groups who benefit from this new employment may vary considerably depending on the type of business and training. E.g. Young people may benefit through part time employment for students. Equality effects may arise where training or employment is not available to groups with protected characteristics, for example if jobs require high skill/education levels which make it harder for some groups to access the opportunities.
Sharing of benefits – **new housing**	The redevelopment includes provision for new homes to rent. Particular groups with high needs for access to housing and high representation amongst the local population include BAME groups, women, families with children, and young people. These groups particularly stand to benefit from new housing associated with the redevelopment, except where affordability barriers limit these opportunities.
Sharing of benefits – new shopping and other facilities	The majority of people living in the opportunity area and the wider Southwark area are likely likely to benefit from access to new shopping and other facilities. The extent to which these these benefits are shared between those with protected characteristics and others will depend depend on the type of goods and services offered. For instance, the new shopping and other other facilities may be of a different mix than currently provided meaning that access to culturally-specific goods and services, associated sense of belonging and cultural connections connections may be more difficult or easier for groups with protected characteristics to access.

Impact	Potential equality effects
	access.
Sharing of benefits – **improved connectivity**	The majority of people living in the opportunity area and the wider Southwark area are likely to benefit from improved connectivity associated with new redevelopment. As part of this redevelopment improvements are being made to rail, subway, and road stations/routes allowing quicker and easier access to and from other areas of Southwark and London. Additionally, the underground pedestrian road crossings are planned to be replaced with more direct over ground crossings. This will improve feelings of safety, actual safety and security, inclusive access – most groups should benefit but particularly older people and disabled people.
Sharing of benefits – **community cohesion**	The redevelopment includes provision for improving access to and quality of public space, including seating, shelter from the road, and access to amenities. This is likely to increase community cohesion foster a sense of place and other benefits. The majority of people will share this benefit. However, consideration must be given to potential barriers to accessing this for groups with protected characteristics – such as access provision for older people and disabled people. Additionally, the mix of type and usage of shops, businesses and facilities on offer, as well as public space will differ from what currently exists. For instance, BAME people who work or shop at the market may experience a loss of community cohesion where the cluster of services they use is dispersed or lost. Similarly older people who attend the bingo hall may experience a loss of social inclusion if this facility is no longer available for them to visit regularly.
Sharing of benefits – educational opportunities	The redevelopment includes a new campus for the London College of Communication. This may be particularly beneficial to young people as well as BAME people. Potential barriers to accessing benefits should be considered.
Sharing of benefits – **creative hub** benefits of College of Communications	Plans are being developed for the London College of Communication archive collections to be made available to the public. These benefits are likely to be widely shared in the Southwark/London area and may provide benefits to groups with protected characteristics, including in relation to cultural identity. Potential barriers to accessing this should be considered further.
Sharing of benefits – increased **night time economy**	An increased night time economy associated with the redevelopment may particularly benefit young people through employment & leisure opportunities. Equality effects may be experienced where there are patterns in terms of affected residents and their having protected characteristics. For example an increased night time economy may decrease feeling of safety for older residents.
Sharing of benefits – **community engagement** during CPO implementation and development	Throughout the development process community engagement will be carried out. Equality effects may be experienced during this, in that affected residents with protected characteristics may be under represented. For instance local young people and BAME people may face barriers to partaking in community engagement processes effectively and therefore be under represented. Conversely, other groups with protected characteristics such as older people may be over represented. As such potential equality effects associated with community engagement should be considered further.