



Revealing local economies in London: methodological challenges, future directions

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1. Acknowledgements

We have drawn inspiration for this project from our years as practitioners, teachers and researchers in London. Our everyday experiences of economic life has prompted many questions which we have sought to unpack and address in this report. We are involved in the Just Space Economy and Planning network, and over the past few years our numerous conversations with businesses and community groups has provided the crucial foundation for this project. In particular, Ilinca Diaconescu and Myfanwy Taylor have played an invaluable role in shaping our thinking and approach.

This report has been stimulated by the insightful work currently being carried out by other researchers and teachers in London: Elena Besussi, Jennifer Robinson, and Laura Vaughan at UCL; Suzanne Hall at the LSE; Jane Clossick and Mark Brearley at CASS Cities; and Paul Hunter at the Smith Institute.

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2. Introduction

This modest project was triggered by a facet of UCL's 2034 strategy ¹ (UCL, 2014), a 20-year plan for the university's development. Part of that strategy is to strengthen and diversify our engagement with our host city:

... We recognise our role in making London a better place to live and work in for all, and in promoting and contributing to social equity and environmental sustainability in our capital city.

... We will help London craft a post-Olympic legacy that generates jobs, supports communities and drives the economy. Our ambition is that by 2034, London will be the global leader in building the interrelationship between higher education, research, innovation and economic prosperity and societal wellbeing.

It is one of a series of small and speedy exercises sponsored by UCL's Vice Provost Celia Caulcott – who also serves on the London Economic Action Partnership (LEAP), which advises the Mayor on his Economic Development Strategy.

The title 'Revealing Local Economies' reflects how much of the economic activity which we experience as citizens often seems invisible or hidden from the statistics and policy discussions of city planning. Londoners earn their living driving vehicles, caring for others, cleaning buildings, doing shop work, teaching, accountancy; repairing lifts, hospital equipment and Xeroxes; they don't all work in the high-end office jobs of government, accountancy, law, banking and management consultancy. And in London economic activity is particularly complex because of the city's size and global connections. There are lawyers practicing in Albanian and Turkish, importers bringing food from the whole world to support super-diverse tastes, people cooking kosher meals on wheels, hosting Gujarati weddings, making architectural models overnight, and customising vehicles for movies. This is the range of our daily experiences.

All these diverse jobs produce goods and services, and these go to users round the corner, across the nation or across the world; some highly sensitive to time and distance (sandwiches and salads, fire, ambulance and rescue, newspapers, transport) while others can move gradually and far (vehicles, footwear, movies, books and research results). Paid work isn't always distinct from unpaid work – particularly in caring activity, parenting, lots of cultural production – and boundaries between employees, self-employed and family workers are threatening to dissolve.

Public policy, though, tends to focus on the most apparently dynamic sectors, those dominated by large enterprises and those which are well-organised and generate high levels of output or output per worker. Its analysis comes downwards from national accounting definitions like industrial classifications which are less and less helpful, classifying enterprises and jobs by their kind of product. But if a manufacturing company outsources its logistics to a specialised trucking firm the manufacturing sector appears to shrink while transport services appears to grow; if the council outsources its finance functions local government appears to shrink and business services to grow.

Furthermore, this economic understanding of the London economy does not match up against the land use classes used in planning (offices, retail, residential) or the property categories used by the real estate sector. Thus we find an ever-growing diversity of activities on 'industrial estates' and in the nominally 'retail' premises on and behind high streets.

In periods of relatively slow urban change the system somehow muddled along. Now, however, the pressure on land and space in London has been so intensified by the explosion of residential land values that the familiar equilibrium is being destroyed. Any landowner who can get permission to switch a site to residential stands to make a fortune. This tendency is reinforced by the pressure from successive Mayors of London to squeeze every last drop of

¹ Further information is available at: <https://www.ucl.ac.uk/2034/themes/london-global-university>

land availability for housing from the Boroughs. Boroughs in turn are desperate for money to offset the cuts from austerity and seek to realise residential values from the service-delivery sites they own, and from commercial properties they have acquired over the years. The tensions surrounding land use change are thus now often highly controversial.

This is the context in which the Greater London Authority (GLA), the Boroughs and local residential and business communities are struggling, and are often in conflict at various scales. Just Space, representing community interests, have been pressing the GLA to better understand the diverse economies of London and to show more respect for them in policy-making (see Taylor and Edwards, 2016). Boroughs too are beginning to be concerned about losses of jobs and services.

So there is a most welcome upsurge of studies which seek to 'get under the skin' of local economies. These studies address and provide a means of overcoming the issue of the 'glass floor' identified by CLES and NEF (2016), where larger institutions fail to understand and engage fully with grassroots activities. This project aims to help this trend along through sharing and developing techniques which can be used by community groups, business groups, service users and local governments and help them to ensure that the results are accepted as 'evidence' in what is supposed to be 'evidence based policy making'.

The need for this work will grow in the coming months and years because of two major shocks to the system. Major changes in business rates liabilities this year seem likely to destroy many businesses and hasten the displacement of many others. And the UK's probable exit from the European Union, on terms which will not be known for years, is bound to pose massive adjustment problems for London through changes in the terms of trade, restrictions on the free movement of European workers, and price changes.

3. Purpose and context

The complexity of London's economy, and the intricate relationships that exist between firms and their workers and customers is known and often referred to, but difficult to reveal and demonstrate. Analyses of London's economy tend either to be strategic and broad, but lacking local detail, or local – based on land use / property types (e.g. offices, retail, industry) or industrial sectors (e.g. financial services, catering, health) – but without revealing the interrelationships between sectors.

More recently (in the last 5 years particularly), there has been a proliferation of studies of local economies, some of which seek primarily to document 'what is there', others focus on revealing and celebrating the diversity of economic activity and what it contributes to the local or London economy. Yet others have tried to go deeper – to better understand the nature and dynamics of the local economy in question, particularly in terms of the embeddedness of local economies in their locales (and in London more widely), and the interdependencies between local businesses (in supply and production chains), their markets, and employees. The commissioners or instigators of such studies are varied and include:

- The **GLA**'s regeneration team, which has instigated five local studies of employment areas (to date) including the Park Royal Atlas, and audits of the Old Kent Road, North East Enfield (Upper Lee Valley), Loughborough Junction (Brixton) and Charlton (Greenwich). The GLA is developing an online list of its Industrial Audit work, and studies conducted with partners².
- **Local authorities**, who have independently commissioned consultants and architects to undertake detailed studies of employment areas, for example in Gort Scott's study of Blackhorse Lane, (LB Waltham Forest) and Tottenham (LB Haringey), and Adams and Sutherland architects study of Feltham (for LB Hounslow).
- **London universities** teaching built environment subjects, working with masters students in groups to survey and analyse employment areas as part of their assignments. This includes the MA in Spatial Planning and Urban Design at CASS Cities, the MA Urban Design and City Planning at the Bartlett School of Planning, UCL, students on the Regional and Urban Planning programme at the LSE, and UCL Geography and Planning students.
- **Academic researchers at London universities**, funded by Research Council funding, for example: Suzanne Hall's (LSE) ethnographic study of Rye Lane, Peckham; Laura Vaughan and colleagues' (UCL Bartlett School of Architecture) research project, Adaptable Suburbs; and Myfanwy Taylor's UCL research on rethinking the economies of London – crucial in the formation of the Just Space Economy and Planning Group³.
- **Community groups, working with researchers to undertake survey work, often in response to threats of redevelopment or displacement.** For example, Latin Elephant business survey in Elephant and Castle, and surveys of businesses in Peckham town centre for Peckham Vision.

A list of the studies we have come across through this research with links, where available, is provided in Appendix 1⁴. Varied methodological approaches have been used, and though there are clear similarities standardization would enable comparisons to be made and studies to be replicated over time. Researchers have faced various methodological challenges in pursuing such studies, or frustrations that their efforts appear to go unheard in policymaking. Many of these studies are initiated on the back of a perceived threats – e.g. Opportunity Area designation, local plan review, site allocation, Area Action Plan designation

² These studies can be accessed at: <https://www.london.gov.uk/node/37952>

³ Just Space Economy and Planning is a sub-group of Just Space set up in 2013 to bring together small business groups, individual businesses and workspace providers, researchers, practitioners and activists with an interest in influencing economy issues in London planning (see <https://justspace.org.uk/category/economy-and-planning/>).

⁴ There will no doubt be more. Many of these studies are not published for public consumption on borough websites, as they are not required formally in the evidence base for local plans, so we have gathered known studies through word of mouth with stakeholders.

or on-going loss of employment sites to housing. This issue is coming to the fore partly through the Just Space Economy and Planning Group and its work seeking to increase representation in London planning from a diverse range of businesses and community groups. More on the community context for this project is provided below (Section 3.1)

Funded by a UCL London 2034 grant, ***the aim of this project is to develop robust and practical techniques which can be used to make good the yawning gap in understanding of what the economy really is and how it works in the day-to-day process of making land-use-change decisions at borough and GLA levels.***

The objectives are to:

- Reveal methodological issues in existing attempts to understand local economies;
- Identify the remaining gaps in knowledge of local economies and how they work, highlighting what existing studies leave out or obscure;
- Set out a future research agenda, and;
- Make recommendations for the future development of a practical methodology/toolkit that can be used and adapted by researchers to develop consistency and standardisation.

This report presents a summary of the project, which has consisted of the following activities:

- (a) A review of the policy context, both national and London planning policy – focusing on what the GLA and local authorities are currently required to do and the types of studies commissioned as part of developing the evidence base on the economy;
- (b) A documentary review of existing methodologies/survey techniques used to audit and understand the nature of economies in industrial areas and suburban high streets;
- (c) An inter-disciplinary workshop, held on 1 February 2017, bringing together a range of researchers, practitioners, masters students, community activists and policy people to discuss the current methodologies in use, gaps in knowledge, and to examine future directions in methods that could be put to practical use (see Appendix 2: Workshop summary).
- (d) Review of pilot studies being undertaken by students at UCL and CASS Cities (academic year 2016-17); and
- (e) Roundtable with relevant academics at UCL and the LSE, held on 27th February 2017 (see Appendix 3: Roundtable summary).
- (f) Review of the preliminary findings of studies by UCL Bartlett Planning Masters students in spring 2017 on the economic activities in Industrial areas and high streets across London, in a module led by Elena Besussi, Michael Short and Pablo Sendra.

In the remainder of this section, we summarise the community and policy context for the project, and discuss briefly London and borough-wide economic studies which contribute to the evidence base for London and local plans. In some places more detailed local economic studies exist, but the patchy nature of their preparation and the lack of links to the strategic level means they are rarely used as formal evidence in plan-making. Sections 4, 5 and 6 thus form the core of our report, where we review local economic studies in detail, the range of approaches adopted, highlighting issues and gaps, and drawing on our own analysis as well as insights gleaned through the workshop and roundtable; Section 7 concludes and brings together our key recommendations.

3.1 Community context

There is a long history of grassroots organisations like tenants and residents' associations, amenity societies, neighbourhood associations (and recently Forums) and urban activists campaigning on employment and economy issues. We have no wish to challenge the established democratic principle that representative government should be by the people, not by business. Local communities have a strong interest in the character and location of employment, enterprises (public and private) and the services which they provide. Some of the great struggles in London's urban history have built on alliances between residents, workers and enterprises, for example in the campaigns which led to the regeneration of Covent Garden as an immensely popular area while doubling its housing (and social housing) stock in the 1970s. Another important example was the controversy over land use

and tenure at Tolmers Square. Community organisations have continued to be involved in these issues in the new century at borough planning inquiries and in relation to the London Plans and Mayors' Economic Strategies.

Community actions have been driven partly by concerns to sustain or even grow the services provided locally in order to reduce the need to travel and (since 2010) to realise the ambition of Lifetime Neighbourhoods. They have also often been concerned to retain levels of employment outside Central London in the face of the centralising trends which have been so strong in most of the city. Increasingly too there has been community concern over the dominance of corporate jobs (mostly in the Central Activities Zone (CAZ)) over smaller, informal and social enterprises. This concern is in turn related to the benefits of local employment in reducing the need to travel, and to gender and ethnic inequalities flowing from the dominant trends. Finally, there has been growing concern about threats to London's economic diversity and robustness —its over-dependence on financial and business services activity— which becomes more urgent in the light of impending Brexit.

3.2 Policy context

The National Planning Policy Framework (NPPF) signals the government's commitment to 'ensuring that the planning system [in England] does everything it can to support sustainable economic growth' (DCLG, 2012, paragraph 19), and obliges planning authorities to 'set out a clear economic vision or strategy' which supports existing business sectors, as well as those new or emerging. Flexibility is key as policies should be able to 'accommodate needs not anticipated in the plan' (paragraph 21). The NPPF stresses that plans should be made on the basis of 'adequate, up to date and relevant evidence about the economic, social and environmental characteristics and prospects of the area', taking full account of 'relevant market and economic signals' (paragraph 158).

Current approaches to planning for the economy, and more specifically 'employment land', are rooted in the 'urban renaissance' agenda which has been dominant in urban planning since the 1990s. This agenda is based on the idea that inner cities can be regenerated through primarily physical redevelopment to deliver new housing, an improved 'public realm', and a broad range of activities to meet the needs of a 'post-industrial' society. In this view employment areas, particularly those which accommodate low density workshops, warehouses and yards, are considered likely candidates for housing-led redevelopment.

These concerns are embodied in the 'compact city' philosophy (Rogers and Gumuchdjian, 1997) which has guided the approach taken by the GLA since its inception. Successive iterations of the London Plan have been premised on the need to contain London's growth within its longstanding boundaries through the planned intensification of development. Policy designations such as Opportunity Areas, Intensification Areas, and Housing Zones have been used to support the redevelopment of land to accommodate increases in floorspace, typically in areas characterised by less dense lower (monetary, or simply rental) value uses. The GLA has commissioned a number of assessments to support strategic planning (such as AECOM et al's (2016) industrial land study and Ramidus and Roger Tym's (2012) Office Policy Review) and the development of opportunity areas (such as the range of recent industrial audits mentioned). The former give a strategic 'big picture' but lack some of the nuance of local knowledge, while the latter provide valuable local 'snapshots' but their relationship to policy and decision-making is often unclear. The London Plan (GLA, 2016) does not contain any explicit guidance for the boroughs on how to investigate and analyse economic issues, providing instead a strong steer on several themes deemed to be of strategic importance (see in particular Chapter 4). More detailed requirements for local planning authorities are set at the national level.

From the 2000s the imperative to support the sustainable re-use of land began to be reflected in government requirements for local planning authority 'evidence bases', which are used to inform planning policy formulation and the assessment of development proposals. The seminal 'Planning for Economic Development' (Ecotec and Roger Tym, 2004) warned against the 'hoarding' of land for employment uses, while the ODPM's 'Employment Land Reviews Guidance Note' (2004) emphasised that only the 'best' sites should be retained for employment uses, mindful of 'market realism'. *Planning Policy Statement 4: Planning for Sustainable Economic Growth* (DCLG, 2009) stressed that employment sites should not be

protected by planning authorities unless there is the ‘reasonable prospect’ of use. The thrust of this guidance emphasised the need for robust evidence to support any continued protection of employment land.

Planning authorities are currently required to plan for employment land in line with government guidelines for ‘Housing and Economic Development Needs Assessments’ (DCLG, 2015) and ‘Housing and Economic Land Availability Assessments’ (DCLG, 2014). Government guidance recommends that plan makers carry out an ‘objective assessment of need based on facts and unbiased evidence’, taking into consideration forecasts and projections. Land availability assessments for both economic development and housing are intended to inform local plan preparation so that the overarching spatial objectives of policy can be delivered on the ground over the lifetime of the plan. The recommended methodology encompasses site identification, assessment of development potential, and indicative trajectory for delivery.

Employment Land Reviews are commissioned by London boroughs to fulfil these requirements. These studies draw on forecasts of economic trends to recommend the safeguarding or release of different types of floorspace. Site surveys and interviews with property experts are then used to identify particular locations where anticipated gains or losses can be accommodated. For example, the employment land review for Croydon (URS, 2010) uses employment forecasts to draw conclusions about the demand for different types of employment premises, and where decline is forecast survey information is used to identify sites for redevelopment (p. 132-3). Similarly, PBA and Ramidus (2013) use employment forecasts to estimate the demand for premises in Richmond and on this basis recommend planning policy approaches. This approach to surveying local economies forges a robust and logical link between land use policies and anticipated business needs. However, these studies often overlook the interdependencies that exist between firms in different sectors, the complexity of supplier, customer and worker relationships, and the importance of certain economic activities to local communities.

In this context the GLA Economics team has been exemplary in consulting with the Just Space Economy and Planning Group (JSEP), amongst others, in the successive stages of production of the Economic Evidence Base for London 2016 (EEB), the final version of which has now been published (GLA Economics, 2016) and will inform the Mayor’s strategies in 2017. However, there was a frustration expressed by members of JSEP involved in the consultation (see JSEP, 2016) that the nature and dynamics of local economies and the challenges they face were not reflected adequately in the evidence base. This was partly due to the strategic nature of the EEB and its focus on specialisation and agglomeration as drivers of growth, which tends to obscure evidence on the nature and dynamics of local economies. However, the patchy and un-integrated nature of local economic evidence acted as a further barrier to using it in strategic evidence gathering.

Thus there is a need to find a way for studies of local economies to form part of the evidence base for both local borough and strategic (London-wide) plan-making. Local economic studies can be used to spotlight the overlooked or everyday economic activities which contribute to the vitality and sustainability of London’s neighbourhoods, highlighting their contribution to employment, and – in many cases – to local services. However, there is little gathered knowledge on how best to go about these local studies. National government does not produce ‘guidance notes’, as it has done for borough-wide employment land reviews. Thus, there is little standardisation across local studies, or guidance for local communities or boroughs who have the resources to do them. At the same time, there have been innovations in methodologies used and many lessons learnt in the process of painstakingly gathering data, which have hitherto gone undocumented. We turn our attention to these matters in the remainder of the report.

4. Local economy studies: starting out

4.1 Objectives

The objectives of a study typically guide the methodological approach and specific methods chosen by researchers. Employment land reviews commissioned by boroughs (introduced in the previous section) are commonly prepared with a view to safeguarding or releasing employment land or premises in line with anticipated economic trends. At the local level, we have already considered the range of agents who commission and instigate studies. These agents often have different objectives guiding the studies, which in turn inform the methodologies chosen. Some examples of the different objectives and the methodological approaches adopted are illustrated below:

a) Shining a light and celebrating, demonstrating the value of what's there and the contribution made by overlooked activities

In a report commissioned by the LLDC, *We Made That* (undated), set out to 'reveal and inspire' by focusing on 15 local businesses to recognise 'the positive contribution that varied sectors make to the local economy', in so doing shedding light on a 'dynamic and diverse local economy' (p. 4). This approach, delving into the detailed experiences and connections of individual firms, provides a rich narrative which reveals issues which might not come to the fore if, for example, a more comprehensive but less probing survey approach had been used. One of the objectives of the GLA's Park Royal Atlas (2014) is to 'improve the visibility of the local economy by celebrating and marketing its diverse products and services' and its contribution to the sustainability of the wider London economy (p. 6). In these studies, a mix of survey and interview data is used to 'get under the skin' of what happens in local economies, using engaging infographics and photographs to give an insight into what happens in places little visited by the general public. The interdependencies between businesses and their contribution to London as a whole are drawn out, and the productivity and resilience of these areas are highlighted.

b) Inform policy decisions on land uses, drawing conclusions on the basis of physical/environmental surveys or observations

These assessments focus on the premises that are occupied by businesses, and answer the question 'what types of premises are being occupied' and 'what is the value/quality of what is there'? They typically combine an assessment of the typologies of buildings occupied by different businesses (industrial sheds, studios, offices etc) and an assessment of the environmental quality and value of buildings focusing on, for example, the age and condition of building stock, vacancy rates, derelict buildings, density, and public realm quality. These studies are often used to support conclusions of borough-wide reviews that recommend release of employment land based on employment forecasts.

c) Inform area-based design proposals

Latin Elephant (2012) use a survey of local Latin American businesses to assess the need for new public facilities and improvements to the public realm. Urban design proposals are devised to suggest modifications to redevelopment plans to better meet community needs. MacCreanor Lavington and Gort Scott's (2011) Blackhorse Lane Urban Design Framework used an analysis of the existing uses and activities in an industrial area to devise development principles which would 'retain and build upon the pre-existing diversity of uses within the area by enabling local businesses and industries to remain in situ wherever possible' (p. 40).

d) Prevent displacement

Studies of local economies instigated by community groups and activists tend to be in response to an immediate or perceived threat. In addition to 'celebrating

'what's there', these studies often explicitly seek to demonstrate that there would be a negative impact if these businesses were either lost or displaced. Such studies might therefore seek to demonstrate the embeddedness of businesses in their locales through either (a) the extensive interconnections between businesses in the area (through supply chains, co-production etc), (b) the provision of local employment, and (c) the contribution of businesses to civic life/the social fabric of the place.

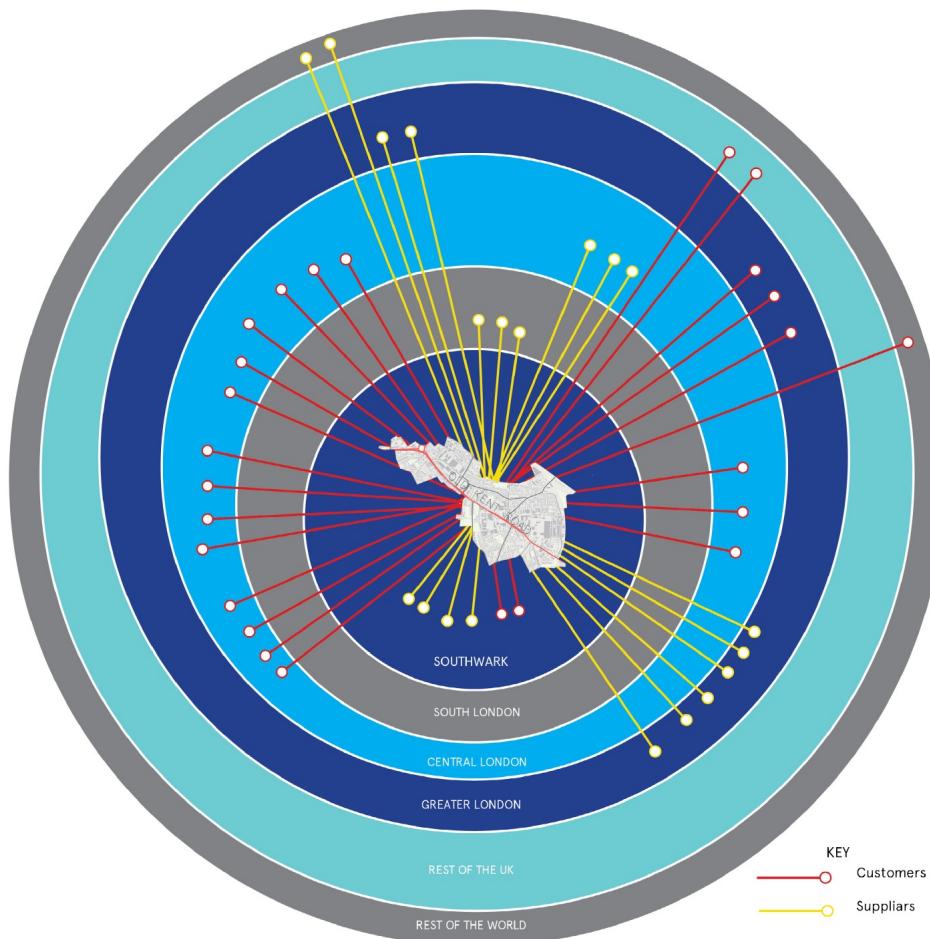
4.2 Scope

The scope of studies are often delineated in terms of spatial extent or subsector of the economy under investigation, and is often decided mindful of budget and time constraints. For example, a local economy study might take a high street, town centre, industrial area or Opportunity Area as its geographical focus. Studies might also choose to focus on particular land uses – such as offices, industrial or retail – or particular types of premises such as co-working or co-making spaces. As mentioned in the previous section, the GLA has a long history of commissioning separate Office Policy Reviews, Retail studies and Industrial Land supply/demand studies, an approach which has an inbuilt tendency to over-simplify the way the city works.

Whilst there is explanatory potential in choosing to focus on a particular area, or subsector of the economy, defining a focus at the outset can section off one particular aspect of the spatial economy from the wider whole of which it forms part. Drawing a 'red line' around an area for the purposes of a study risks neglecting the complex economic interactions which extend outside this boundary, underplaying the wider importance of a local economy. A study which analyses a sector of the economy in one particular part of London might lack strategic weight in wider decision-making processes, while a London-wide study could lack purchase on borough or area-based plans and decisions.

When choosing the scope of a study, commissioners and researchers need to be aware of what might be left out in defining a particular scope. This might lead, for example, to the study of a local economy neglecting important elements located outside the boundaries of the Opportunity Area in question. Such an approach would obscure the broader impacts of redevelopment. Rather than choosing to deal with discrete sectors, a study could take an integrated perspective on the local economy, rather than considering different sectors such as office, industrial, or retail in isolation. When conducting the research design of a local study, thought could also be given early on to how the study could inform strategic decision-making (at, say, the London level). For example, one UCL MSc Urban Design and City Planning student project on the Old Kent Road (2016) has attempted to highlight the strategic role and wider interconnections of local economies, for example through depicting supplier and customer links which extend from the local area to the rest of London, the UK and internationally (see Figure 1).

Figure 1: Old Kent Road's business networks



Source: UCL Urban Design and City Planning students (2016) 'Making the City', p. 13

4.3 Resources

The nature of investigation will invariably depend on the resources available to the researcher. Organisations such as local authorities or development corporations might be able to conduct studies in-house if they have skilled staff able to carry out research, analyse and interpret findings, and design and produce reports. Longstanding fiscal and organisational pressures on public bodies mean that the preparation of studies are typically contracted out to specialist consultants, where the scale and nature of investigations depends on the client brief and funding made available to the consultant.

It is likely that a large proportion of the resources allocated to a study will be consumed by surveying and interviewing businesses. For example, the Park Royal Atlas (GLA, 2014) took 525 'man-hours' [sic] to survey 2,150 workplaces and interview 245 businesses. Community groups who lack the time and financial resources to undertake or commission a study might want to consider working with university students – there is potential for a mutually beneficial relationship to be established where community groups can gain robust and high quality evidence, and students can gain experience in empirical research techniques and develop an appreciation of the nuances of local economies.⁵

CASS Cities students (2017) conducted an extensive audit of the Old Kent Road, where they spent 320 hours observing 950 businesses and conducting in-depth interviews with 430

⁵ Based on extensive experience, Just Space has prepared a 'Protocol on research collaboration between community/ activist groups and university staff and students on housing and planning issues', a useful note on avoiding pitfalls and ensuring good outcomes <https://justspace2010.files.wordpress.com/2011/06/jsp-research-protocol-draft3-2017.pdf>

businesses. UCL Geography and Planning students (2016) chose to focus on fewer businesses in their audit of Harlesden, collecting observational and interview data on 278 businesses. The different scope of the studies allowed the former to provide a comprehensive overview of the different sectors and clusters of the Old Kent Road, whereas the latter placed a greater emphasis on case study profiles of selected individual businesses. This shows that the approach and extent of a study can be tailored to the resources available to the researchers.

5. Audits: documenting what is there

Audits are a useful tool to get to grips quickly with the nature of the economy in a local area, to understand at a basic level what companies are there, and the nature of the premises they occupy. They can range from simple inventories (i.e. lists, databases) of businesses in an area, to maps of business types and premises. Audits can start from desk-top work and progress to site surveys, depending on the time and resources available. Further, audits could form the foundation for further in-depth research – firms can be selected for interview using contacts gained through an initial survey. Survey methods can also be employed to audit local facilities or assess the ‘quality’ of an area – many local-authority-commissioned employment land reviews choose to do this (for an example, see the URS survey template in Appendix 4).

5.1 Desk top research

A certain amount of information gathering can be done as desktop work, before going out on site. Local business directories can be consulted to access business names, addresses and telephone numbers. In this way, a basic list or inventory of businesses active in a local area can be compiled. UCL Urban Design and City Planning students (2016) used directories as a basis for collecting contact details of businesses in the Old Kent Road area, so that they could arrange a follow-up interview.

Initial desktop work could also review previous studies that might have been done in the past in an area, and use this as a starting point. For example, LB Barking and Dagenham’s (2015) Creekmouth Industrial Area Site Survey could be used to frame the design of further research with businesses in the area, allowing comparisons to be drawn over time. Any subsequent site based observational work could therefore be valuable verifying and adding to existing information, ensuring that it is up to date.

Other sources, such as Google Earth and Street View, can be used to get a rough picture of building typologies and the number of premises present in an area. However, these estimates might not prove accurate, and would need to be verified through site surveys and observation to check whether (for example) premises are subdivided. Even when sources such as OS maps are used, Gort Scott (2013a) found that some parts of the map were out of date or misleading. This highlights the importance of further site-based work to ensure baseline information is accurate.

5.2 Site surveys/ observational work – occupiers and business premises

On-site surveys and observational work is therefore valuable in verifying the accuracy of desktop data, and further in enabling the researcher to gather more detail on the nature of premises and firms in the area of investigation. This initial audit work is, however, limited to what the researcher can observe on the ground, before speaking to any businesses.

Site surveys and observational work can be used to estimate how many businesses are operating in an area or to compile a full inventory of businesses (for example, Gort Scott’s 2013 employment studies of Tottenham and Walthamstow). Simply listing the names of all the firms in a study can be a powerful way of demonstrating the variety and numbers of firms active in an area (for examples, see Clossick, 2014, and GLA, 2014).

Further work to map (a) businesses and their locations, (b) business type, (c) types of premises occupied can be done using an OS base map (for accuracy - though note the caveat above - or other Google maps or OpenStreetMap for a rough indication). Classification systems such as Standard Industrial Classification (SIC) and Use Classes (see Appendices 5 and 6) are often employed to categorise businesses and premises, though it could be argued that these abstractions are reductive, and shed light on only limited aspects of local economic practices. Further research and reflection could productively address what these categories reveal and conceal (see discussion on categories in Section 5). Observational mapping work can also miss ‘hidden’ businesses within businesses, where businesses without a public face are not picked up.

Observational mapping has been used in the ‘Enterprising Whitechapel Strategy’ (Regeneris and We Made That, 2015). We Made That use observational street-level data collection to gather information on six business sectors, mapping the respective sectors and identifying ‘gaps in the offer’ which could be addressed to enhance the prospects of each respective sector. Whilst insights from businesses are drawn on in framing sector profiles, the broad-brush nature of the survey does not explore the experiences and needs of businesses in-depth.

Surveys can also be used to assess the physical attributes of an area. The Park Royal Atlas (GLA, 2014) assesses the general condition of buildings and the contribution made to the character of the area. The GLA and LB Southwark’s (2016) Old Kent Road study uses site surveys to assess the following factors:

- Quality and condition of buildings
- Quality and condition of the neighbouring environment
- Ease of vehicle and pedestrian movement
- Quality of public realm

A drawback of site survey and observational methods is that it can still be difficult to ascertain the numbers of premises on site, *even after* visiting sites and checking signage and entranceways. Gort Scott (2013) found that even after a survey had been carried out some units had been subdivided in ways that made it difficult to ascertain exactly how many enterprises are present, raising the prospect of ‘hidden’ premises and businesses.

Employment land reviews often use observational data collected on site to inform redevelopment proposals when forecasts indicate that demand for certain uses are likely to grow while demand for current uses are predicted to decline. The employment land survey for LB Croydon uses observational data used to identify sites for redevelopment using the following criteria (URS, 2010: 132):

- Poor Quality/Ageing Office Stock
- Poor Quality of Public Realm
- Vacant developable land present
- Derelict buildings present
- Low (>50%) building – plot ratio
- Low building heights (in relation to surroundings), and
- High marketability rating and lack of development constraints.

This highlights the importance of considering the objectives of the study when interpreting its findings (see the survey proforma in Appendix 4).

In parallel with this study a large class of Masters students in UCL’s Bartlett School of Planning have been working on field studies of industrial and high street areas across a broad band of London from Southall through to Barking, under the direction of Elena Besussi, with support from Pablo Sendra, Michael Short and Michael Edwards. This work has added a lot to substantive knowledge, to methods of mapping and choice of categories but was not available in finished form in time to be summarised here. We shall add a link to it in the online version of this report.

6. Understanding the economy and its value

Audits provide an invaluable snapshot of an area in time, and provide a basic level of information on what the economy of an area consists of. However, they don’t help us to understand how a local economy actually works, what interdependencies exist between businesses, customers and employees, the nature of local embeddedness of businesses, or their broader strategic links (e.g. to customers and suppliers beyond the local area). Nor do they help us to get any sense of how the economy is developing in an area (whether it’s expanding or shrinking). In order to ‘get under the skin’ of the economy of a place, other

qualitative and ethnographic methods have been used in various studies and are reviewed here.

It is also unusual for audits to explore environmental or social externalities of the activities taking place —the waste streams, traffic flows and emissions, or the qualitative aspects of the employment relationships found. In a society and a city becoming more committed to the idea of a circular economy, to ‘fairness’ and the ending of in-work poverty, these are serious omissions which need to be tackled. We consider some of these issues here.

6.1 Driving questions – what do we want to know?

The exact approach chosen often depends on what we want to know or what the questions driving the research are. Examples include:

- What do businesses here produce/contribute to the economy?
- Why are they located here? Do they need to be here?
- What would happen if these businesses were lost or displaced?
- What are the interconnections between businesses in the area (supply chains, co-production, services provided, resources shared)?
- How embedded are businesses in the local place? Do they employ people locally? Do they contribute to civic life?

In the studies we have reviewed, there are often implicit or explicit strategic questions such as these driving the design of qualitative research, which then influence the questions chosen in employer surveys or interviews. However, some questions are not always answered, even if the researcher hopes them to be. Being aware of these questions at the outset can help to shape the research design.

6.2 Employer surveys

Once an initial audit has taken place, a further survey is often used to capture more detailed and qualitative information about the firms active in an area.

Before starting, it is worth first reviewing any borough-wide employer surveys. Local authorities often conduct periodic surveys of businesses (see, for example, LB Camden 2014) to assess the challenges and opportunities faced by firms. These sources can yield useful information on, for example, views on the cost and availability of premises. The drawbacks of such large scale and general surveys is that the data collected does not necessarily shed light on the issues faced by smaller areas or subsets of the economy, but they may help to guide questions asked in the more detailed local study in order to allow for comparisons to be made between the local study area and the borough as a whole.

Employer surveys for the Tottenham and Waltham Forest studies (Gort Scott, 2013a, 2013b) have taken the form of brief conversations with members of staff – to collect data on the following:

- Number of staff on site/ off site
- Nature of industry/ specific skill
- Production volume/ value
- Where inputs are sourced from and where goods/ services are sold to
- Number of staff from local area
- Years present in their location
- Why they are located in the area
- Contact information

Telephone, in-person, email, internet or postal survey methods could be used, though up to date and accurate contact details are essential to ensure all the firms in an area can be reached. There are advantages and disadvantages of the method of approach chosen. Postal surveys are rarely used these days, as they are more expensive and slow.

Email/internet surveys are now commonly used but researchers need to be aware of ‘survey fatigue’ and can expect low response rates. In-person surveying is more time-consuming but tends to have a higher hit-rate and gives the opportunity for follow-up interview questions, if desired.

One of the major drawbacks of employer surveys is the difficulty of gaining information. Gort Scott found during their fieldwork in Tottenham and Waltham Forest (2013a, b) that it was sometimes tricky to capture businesses if they operated outside the hours the survey was conducted, an issue which could be overcome by making repeat visits or telephone calls. As businesses were not obliged to respond to the survey they found that a large number of businesses chose not to respond. They speculate that this might be due to the presence of illicit small businesses, or in the case of larger businesses a reluctance of junior staff to reveal information which might be considered commercially sensitive.

UCL Geography and Planning students researching Harlesden (2016) found that while some business owners were happy to talk, many could not be accessed. They also cited language and a lack of trust amongst businesses in the survey process as limitations. CASS Cities student researchers at the Old Kent Road (2017) adopted a ‘door knocking’ strategy, ensuring that their interest in and enthusiasm for the firm in question was clear to the employee they encountered. These interpersonal interactions built up trust between the researcher and business, easing data collection. In contrast, UCL student researchers found that by calling firms ahead of their visit they were able to arrange an appointment to speak to the manager/owner at a time of his/her convenience, rather than relying on responses from random employees who happen to be on site at the time of the survey, and who might be too busy at that time of day to respond.

Information on the activities of firms are often used to allocate Standard Industrial Classification (SIC) codes to firms. The extremely wide variety of activities covered by SIC codes means that a balance has to be struck between sub-sectoral specificity and more general classification. The GLA’s Park Royal Atlas (2014) and Old Kent Road (2016) surveys, and URS & Marko and Placemakers’ LLDC study (2014), allocate activities to broad SIC categories such as ‘manufacturing – food’ and ‘vehicle sale and repair’. Adopting this approach means that specific sectors can be mapped and analysed, and allows comparisons to be drawn between sectors.

However, there are drawbacks of this approach. First, SIC codes are industry-defined, rather than activity-defined. Business clusters are often over-looked in categories commonly employed, and categories can obscure the interconnections between businesses. In the Park Royal Atlas (GLA, 2014) most uses connected to the area’s substantial film industry are categorised as ‘information and communication’, while the specialist film equipment and prop hire firms are separated into the ‘services other’ category. Maps and tables derived from this classification schema therefore do not highlight the interconnections between these activities. Second, there is a degree of interpretation involved in deciding what to include and exclude from each category. A connected issue is the classification of firms according to their *primary* business activity, which might not capture the diversity of other activities carried out by firms.

SIC-based categorisations can then also be used to allocate ‘typical’ use classes⁶ to the firms captured by the survey (see Figure 2). A finer grained and more definitive attribution of use classes would require analysis of planning application data for each premises, a time-consuming task which may nevertheless leave gaps where no relevant planning records exist. However, there was a perception amongst workshop participants in this study that use class categories were mostly unhelpful, and that an understanding of how buildings are used (activity based) is more illuminating.

⁶ See Appendix 6 for an overview of use classes

Figure 2: LLDC business sectors

Business Sectors	SIC 2007 Codes	Use Classes
A Manufacturing - food	C10, C11	B2
B Manufacturing - textile	C12-C15	B2
C Manufacturing - printing	C18	B2
D Manufacturing - other	C16, C17, C19-C33	B2
E Utilities and waste	D35, E36-E39	-
F Construction	F41-43	-
G Vehicle Sale and Repair	G45	B2/B8
H Wholesale - construction	G46 (only construction)	B8
I Wholesale - other	G46 (other)	B8
J Transport and storage	H49-H53	B8
K Information and communication - sound and video	J59, J60	B1a/B1b
L Information and communication - other	J58, J61, J62	B1a/B1b
M Services - financial and legal	K64- K66, L68, M69, M70	B1a
N Services - design and architecture	M71, M73, M74	B1a/B1c
O Services - other	M72, M75, N77-N82, S94-S96	B1a/B1c/B8
P Education, health and social	P85, Q86-Q88	-
Q Arts and culture	R90-R93	B1c/B8
X Other	G47, 084	-
Y Vacant	Y	-
Z Unknown	Z	-

Source: URS and Marko and Placemakers (2014) 'Legacy Corporation business surveys' p. 6

Students at CASS Cities and UCL have found that it has been beneficial to collect and record as much raw data as possible on each business, so that other researchers at a later date can go back to the raw data and extract other information, if this is more useful for the purpose of that research. It also helps in cases where different student researchers have interpreted categories in different ways. CASS cities students also chose to develop 'impact categories', reflecting issues such as noise, HGV movement generation, traffic generation, and smells. Figure 3 demonstrates the colour coded (green/ red) system devised by the students to indicate the 'mixed use compatibility' of different activities.

There are, however, sectors of the economy that cannot easily be captured using survey approaches. Many enterprises do not occupy 'employment' premises, and instead operate from ostensibly residential buildings. Many parts of the 'white van economy' (such as plasterers and electricians) have limited storage requirements and provide services at the premises of their customers, so do not necessarily require specialist accommodation. Similarly, Uber drivers operate from residential addresses, as do many sole-practitioner professionals. Few local economy studies have sought to capture these sectors, but doing so could bring valuable additional perspectives to understanding economic practices and interdependencies.

Figure 3: Impact categories indicating mixed use compatibility of activities



Source: CASS Cities Spatial Planning and Urban Design students (2017) 'The audit book' p. 43

6.3 Interviews

Interviews can be used for a variety of purposes. They can be used to gather basic information, facilitating comparisons between firms on the basis of a series of clear predefined questions. Alternatively, unstructured or semi-structured interviews can be used to drill down and highlight the issues faced by individual businesses, gaining deeper and richer data about particular experiences and prospects. CLES (2010) argue that researchers should take on board the views of businesses and local stakeholders to complement quantitative data collection.

Studies which use this method typically interview between 14% and 19% of active firms in the area of investigation, though it should be borne in mind that it is likely that many more firms will need to be approached by researchers to gain data from this proportion of businesses. The Park Royal researchers (GLA, 2014) found that response rates varied according to the typical premises typology used by different firms – response rates were lower for professional services businesses because they tended to occupy upper floors so were less visible and accessible than manufacturing businesses.

Several studies have employed structured interviewing to gather mix of qualitative and quantitative information about businesses. For example, URS and Marko and Placemakers' (2014) LLDC research addressed the following topics:

- Type of business (independent, branch, etc)
- Business size
- Proportion of local employees
- Length of tenure
- Type of tenure
- Days and hours of operation
- Supplier and customer locations
- Plans to expand or move
- Interesting production figure
- Location advantages and improvements

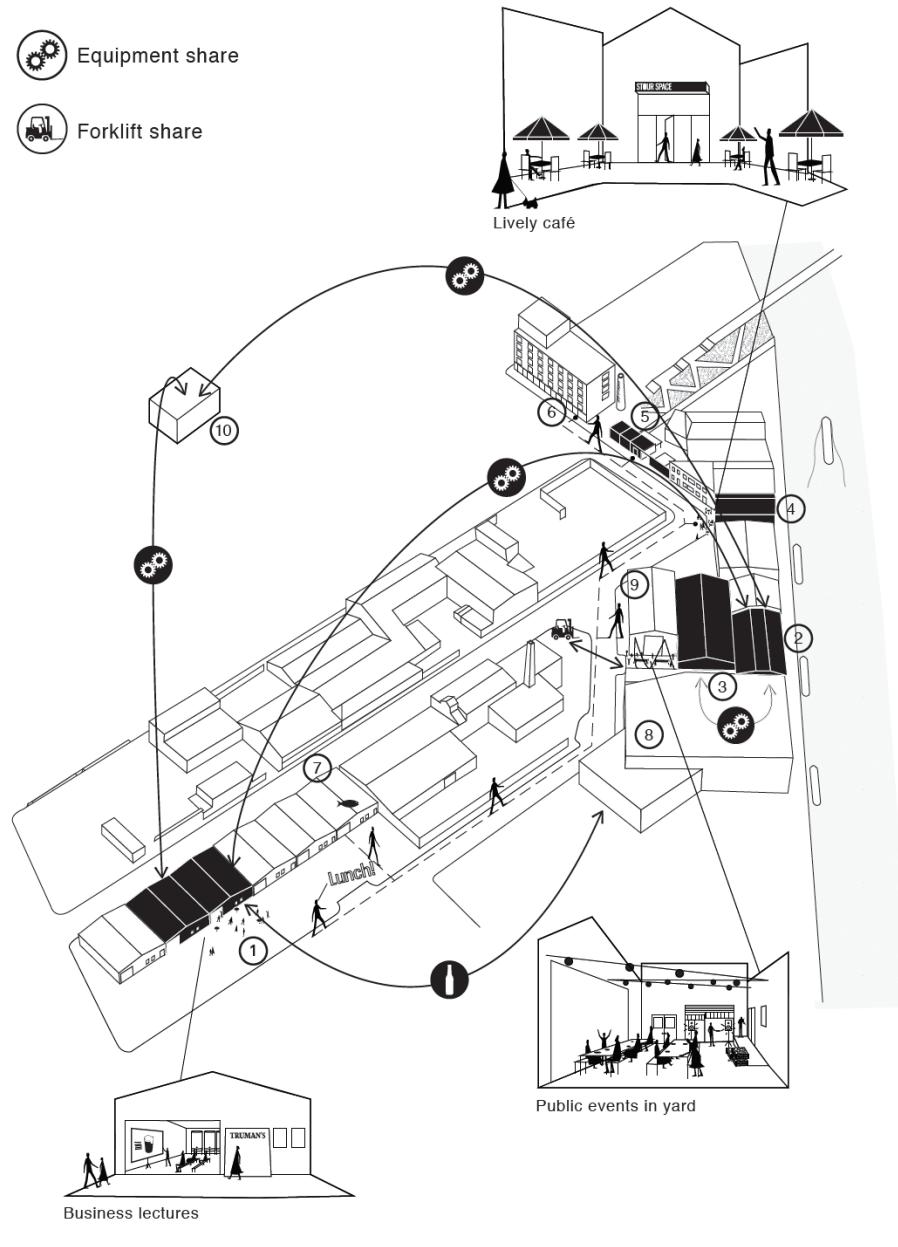
In addition to these topics, the Park Royal Atlas collected information on anticipated employee and floorspace requirements. Structured surveys could also collect data on topics such as parking provision, vehicle movements, and tenure (including lease lengths and notice periods). Similarly, Adams and Sutherland's (2016) study of Feltham uses structured interviews to uncover why firms are located in the area, examine local linkages, and explore future aspirations.

A less structured interview format can be used to gain more contextual and general information to add richness and depth to a study. Borough-wide employment land assessments often use this method to gain property market information from agents and stakeholders as a complement to quantitative information. Several recent in-depth studies have used semi-structured interviews with individual firms to provide insights into the activities and perspectives of particular businesses. These 'case studies' are valuable in shedding light on the crucial issues faced by firms. The Park Royal Atlas (GLA, 2014) uses interview data alongside survey data to 'get under the skin' of the diverse uses which characterise the area. By profiling individual firms, the Atlas draws out the interconnected nature of particular businesses in specific industries (such as food production and film and sound recording).

We Made That's study for the LLDC uses detailed descriptions of 15 firms to provide an in-depth picture of their connections, operational requirements, use of space, and their plans for the future. These engaging vignettes do not provide a comprehensive overview of *all* the activities present the area; rather, by zooming in on the experiences of selected businesses it is possible to demonstrate the local embeddedness and contributions made by particular firms to other businesses and communities in the locality. For example, their drawing of the Stour Road food cluster in Hackney Wick (Figure 4) graphically demonstrates equipment

sharing between co-located firms and provides an insight into the importance of spatial proximity.

Figure 4: Equipment sharing, Stour Road Food Cluster



Stour Road Food Cluster

- | | |
|---------------------------------|------------------------|
| 1. Truman's brewery | 6. Premier Supermarket |
| 2. Dalston Cola, Vittoria Wharf | 7. Wicker Fisheries |
| 3. Rejuce, Vittoria Wharf | 8. H. Forman & Sons |
| 4. Counter Café, Stour Space | 9. Organic Wick |
| 5. Muff Café | 10. Butler's Gin |

Source: We Made That (Undated) 'LLDC Local Economy Study: qualitative research' p. 106.

6.4 Ethnographic research

Ethnographic research methods are used by some (mostly academic) researchers to gain a fine-grained appreciation of economic life, grounded in a thorough understanding of context and the multiple, and often subtle, interactions which underpin the operation of specific local economies. This approach to research entails long periods of observation and interaction with environment under investigation.

Jacobs' (1961) classic work on US cities uses street-level observations to draw conclusions about the importance of interconnections between proximate activities in supporting economic life. For example, the presence of a diverse variety of land uses around Hudson Street, Greenwich Village supported the commerce and vitality of the street (p. 153). Focusing on a smaller scale, William H. Whyte's (1988) observation of shoppers, passers-by and street vendors near large Manhattan department stores sheds light on the complex and multifaceted interactions which characterised mainstream and illicit retail in New York.

More recently, Rhys-Taylor (2013) has taken a multisensory approach to investigating the operation of Ridley Road Market in Hackney. Utilising thick description which focuses on the sights, smells and sounds of the market, he paints a vivid portrait, which is sensitive to the personalities and details present in this 'everyday' space.

Suzanne Hall (at the London School of Economics) has used ethnographic methods to shed light on the characteristics and interdependencies of traders in Rye Lane and Walworth Road in south London. This approach sheds valuable light on the 'who' as well as the 'what'. By spending time and engaging in repeated interactions with traders and customers, a fine grained picture of local life has been built up, underlining the relationships that exist between different businesses and the local area. Informal interactions with firms can be recorded as 'field notes' and used to inform the findings of a study. Hall's research in Walworth Road uses excerpts from fieldwork conversations as well as fieldwork interviews (for example, see Hall, 2012: 68, 86, 115). An ethnographic approach involves immersion in the place of study, a process which Hall reflects entails an investment of time and emotion, as valuable conversations often happen after several initial meetings (*Ibid.* 25).

Hall's (2013) work in Rye Lane has uncovered 'hybrid' interiors behind individual shop fronts, where internal spaces of premises are sub-let to a range of small enterprises (see Figure 5). This ethnographic approach allows the functioning of, and relationships between, these activities to be described and explained. This approach is therefore valuable in getting behind the façade of premises and moving beyond the abstraction of land use categories to understand how local economies actually function in practice, often with very high worker densities.

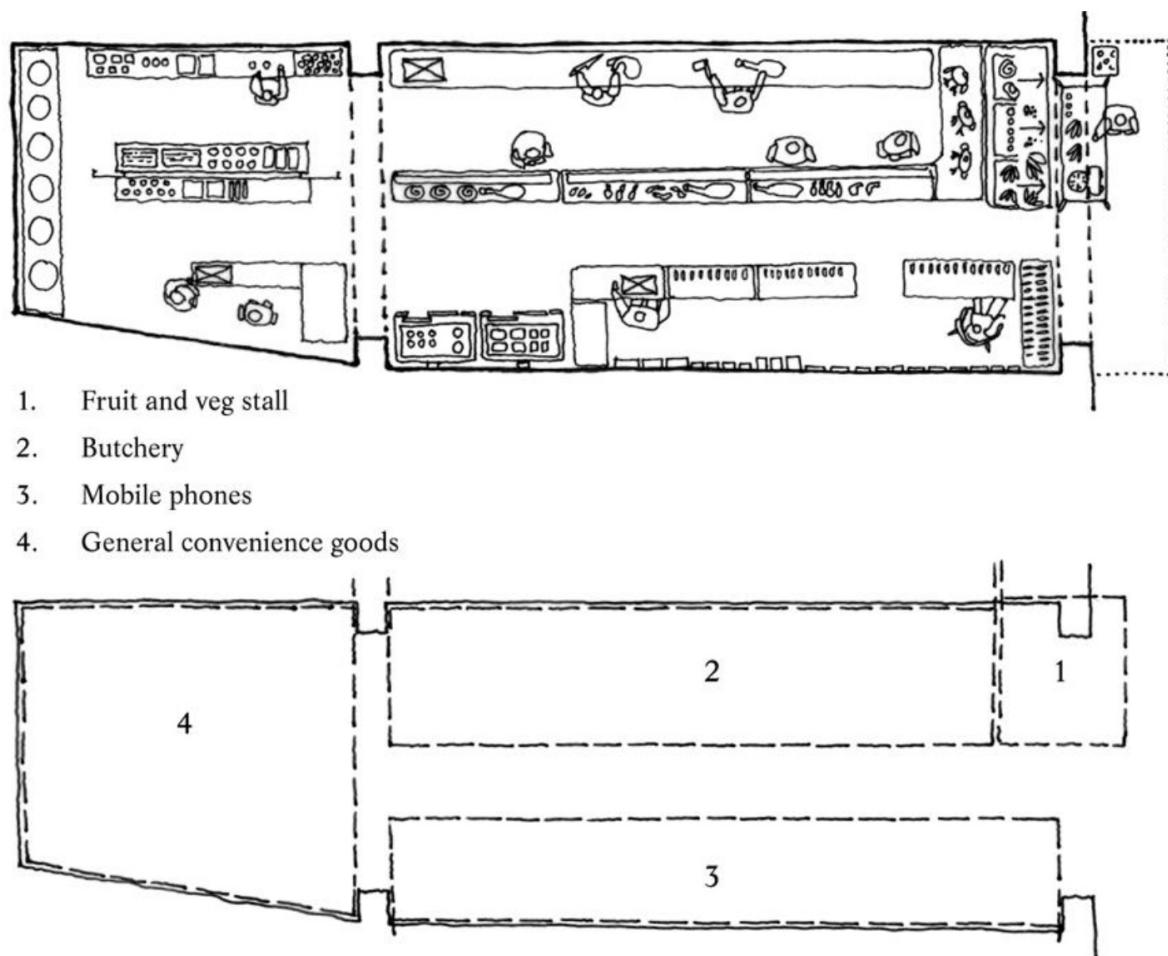
Ethnographic filmmaking can also be used to tell the story of a place, and convey information that would be difficult to transmit through still images and text alone. *The Seven Sisters Indoor Market* film (2016)⁷ provides an insight into the day-to-day operation of the market, and draws out the role the market plays for customers and the importance of this location to local social networks. Hall's *Ordinary Streets* research has been drawn on in a short documentary film which shows the spaces and people investigated by the project, and summarises crucial issues raised by research.⁸

These approaches are valuable in describing and analysing the places where economic life takes place, and provide a rich insight into the complex relationships and interactions on which specific local economies are built. However, the highly localised nature of these studies might mean that their analysis and findings could be overlooked in decision-making at wider scales.

⁷ Trailer available at <http://www.sevensistersmarketfilm.com/trailers>

⁸ The film can be viewed at <https://www.youtube.com/watch?v=9bKWr2ljyIM>

Figure 5: Drawing of a hybrid interior



Source: Hall (2013) 'Rescaling the transnational city' p. 21.

6.5 Knowledge gaps and future research

In reviewing local economy studies and discussing these with colleagues at our February 2017 workshop and roundtable sessions, several key ‘gaps’ in knowledge and topics for further investigation have arisen, and are discussed in turn below.

Longitudinal studies

A significant research gap is the dearth of longitudinal research on the evolution of local economies over time. Studies which track the characteristics and functioning of firms over a defined time period can yield rich information on the changing nature of local economies and allow conclusions to be drawn on certain key factors influencing the growth and development of particular sectors or places. Moreover, including socio-economic elements in longitudinal research can shed light on (for example) changing skills bases and working patterns. Longitudinal research designs could also be used to track firm displacement. Catching up with businesses previously interviewed/ surveyed who have since been forced to move from an area (for example because of redevelopment or rent rises) could provide valuable information on this process, which is notoriously difficult to research after displacement has already taken place.

Longitudinal research designs are used infrequently, undoubtedly because of the cost implications and the fact that political cycles (in local authorities) deter research that takes many years to yield results. However, given the rapid pace of change in London, even narrow intervals between data collection could reveal the direction of change on the ground.

Alternatively, through desk-based research, Professor Laura Vaughan and colleagues at UCL Bartlett School of Architecture have made use of Google Streetview to understand changes to buildings in London’s high streets over time. Google Streetview is a freely available tool, which allows for comparisons over time between snapshots at different moments. Albeit limited in what it can reveal, it provides a quick and cheap way of tracking physical changes to the built environment.

Measuring ‘value’

A strong theme that emerged at the Workshop and Roundtable held as part of this study was the need to better understand and explain the value generated by diverse local economies in locations that are often undervalued in planning discourses and practices (such as suburban High Streets, and industrial areas). The economic value (measured in monetary terms) generated by firms in an existing area could be, but is rarely, captured using a range of quantitative measures such as: production figures (services provided or goods made, see Figure 6); salaries paid, revenue generated, local spend (and multiplier effects), and collective business rates. Suzanne Hall at the LSE has done work calculating the collective business rates in Rye Lane, Peckham, and found that they exceed large shopping centres such as Westfield in Stratford. This is a powerful way of demonstrating economic value and can help to build a business voice. However, compiling this information is resource-intensive and requires skill to work through raw data collected by local authorities. NEF’s study of Queens Market in Newham (2006) demonstrated the value of the market in terms of employment generation, numbers of independent businesses, the variety and price of goods, and its contribution to the local economy. These quantitative measures have been used in supporting arguments against the redevelopment of the market.

Figure 6: Production around here

PRODUCTION AROUND HERE

A BUSINESS IN TOTTENHAM...

MAKES 14,000 TO 35,000 GARMENTS A WEEK.
IMPORTS 50,000 CARPETS A YEAR.
USES 10 TONS OF SUGAR A WEEK.
SELLS 10,000KG OF SAUSAGES A MONTH.
USES 80 TONS OF ALUMINIUM A YEAR.
DISTRIBUTES 150 TONS OF NUTS A YEAR.
SELLS 10,000,000 GARMENTS A YEAR.
MAKES 1 SET OF TEETH A WEEK.
SELLS 20 TO 25 TONS OF FOOD AND DRINK A WEEK.
PRODUCES 15 TONS OF DONER MEAT A YEAR.
SELLS 20,000LTRS OF YOGHURT A WEEK.
DISTRIBUTES 2 TONS OF COOKING OIL A WEEK.
SELLS ON AVERAGE 50LTRS OF PAINT A DAY.
INSTALLS UP TO 120 TAXI METERS A WEEK.
SELLS AND DISTRIBUTES 20,000,000 LTRS OF HEATING OIL A YEAR.
PRODUCES 700KG OF HUMMUS A WEEK.
RENOVATES UP TO 200 MANNEQUINS A WEEK.
MAKES UP TO 50 WINDOWS A WEEK.
SELLS UP TO £1,000,000 OF ALCOHOL A WEEK.
CLEANS UP TO 20,000 SHIRTS A WEEK.
SERVICES UP TO 40 COFFEE MACHINES A WEEK.
USES UP TO 100 TONS OF FLOUR AND MAKES OVER
1,000,000 ROLLS, 480,000 BAPS AND 650,000 BLOOMERS A YEAR.
PRODUCES UP TO 107,000KG OF CHEMICALS PER YEAR.
SELLS OVER 10,000 TUBES OF HAIR DYE A MONTH.
PREPARES UP TO 120 TONS OF FOOD FOR CATERING A WEEK.
MAKES UP TO 700 PAIRS OF SHOES A WEEK.
PROCESS UP TO 1 TON OF DRIED ENERGY FOOD A WEEK.
MAKES 20 MATTRESSES A MONTH.
MAKES UP TO 180 SIGNS A YEAR.
SERVES FOOD TO 150 PEOPLE A DAY.
SELLS MORE THAN 1,000MTRS OF FABRIC A DAY.
CHANGES 40-45 TYRES A WEEK.
USES 1.5TONS OF MALT AND 40KG OF HOPS A WEEK.
AND MAKES 12,000-15,000 PINTS OF BEER.
SELLS 6 VENTILATION SYSTEMS A DAY.
MAKES 1 KITCHEN A WEEK.

Gort Scott (2013a) 'Tottenham employment study' p. 22

'Value' could also be framed in terms of the non-monetary contribution of local economies – for example social or environmental value. Particular activities might be cherished by communities, firms might contribute to local economic diversity, and more broadly underpin the human vitality that characterises local economies. It might also be possible to measure value over time: a focus on short-term value might underestimate the long-term value that local economies could generate in terms of resilience, job progression, economic diversity and embeddedness. In developing a consistent approach to understanding the value of local economies, work could draw on an ongoing GLA project, *High Streets for All*, (not yet published at the time of writing), being led by academics at the LSE. This study is working on measuring the economic, social and environmental value of high streets, which would be important to draw on; as would work undertaken to date by NEF. Participants at the workshop considered it important to work with the GLA Economics team in developing this work, in order to understand how best to frame 'value' in terms that could be considered in evidence gathering at a strategic level. Part of this might be understanding whether we can give an economic value to social and environmental values. In addition to understanding the value of local economies in a defined area (such as a high street, or industrial area), an alternative (or complementary) approach could be to look at sectors, such as printing or construction.

Combining datasets

There is scope too for studies to consider businesses and socio-economic characteristics in an integrated and holistic manner. The Kings Cross Household Survey report (Mutale and Edwards, 2002a) was conducted on the basis of a random sample of the area's residents, and provides extensive information on economic activity, access to employment, employment by occupation, hours worked, income, and a variety of other topics. An extensive survey of employers (Mutale and Edwards, 2002b) was also conducted as part of the project, providing an in-depth picture of the nature of businesses, local connections, and aspirations of firms in Kings Cross. However, the findings of both surveys were not analysed in relation to each other. There is potential for local resident characteristics (such as skills, employment status and occupation) to be considered alongside business characteristics to draw out the relationship between firms and residents.

Borough-wide employment surveys such as AECOM's study for LB Brent (2015) use census data, the ONS Annual Population Survey, Business Register and Employment Survey and Local Labour Force Survey to construct a socio-economic profile of the area under investigation. The usefulness of these data sources depends on the 'fit' between the study area and the data available, and the possession by the researcher of skills needed to obtain and analyse statistical data.

Not being measured/or not easy to measure

The dimensions of gender and ethnicity are rarely drawn out in local economy studies, yet these considerations could be vital in understanding the contribution made by local economic sectors and places to different sectors of the community. The question of ethnicity in particular raises methodological issues for researchers – students at CASS and UCL have attempted to capture this data. Rather than include confidential questions on ethnicity in surveys, which often does not reveal an accurate picture due to failure to complete, or participants choosing not to reveal their ethnicities, an observational approach was used, which also clearly has its limitations. Both methods – due to the categorisations chosen in ethnicity reporting – would fail to pick up on clusters based on nationality. Some enterprises or even clusters have strong orientation to specific user groups, for example, the cluster of Vietnamese food suppliers in Charlton Riverside, or businesses in Elephant & Castle or Seven Sisters directly serving the Latin American communities. Yet, these are important nuances that help to understand the contribution of migrant and ethnic enterprises to London's status as a global city. Similarly, explicit considerations of gender rarely feature in business surveys but could shed light on the divisions of labour in particular sectors and places, and the interdependencies that are crucial to the on-going sustainability of economic activities and social life.

Beyond job quantities

The quantity of new jobs delivered tends to be the target of Opportunity Areas. However, we need to have a better understanding of the interconnected nature of jobs. For example, when we replace one job with another type of job, what wider impact does this have on other jobs lost and created? We also need to focus more on job quality, not just quantity. Job quality has been a longstanding topic of interest for the Just Space Economy and Planning (JSEP) network, and can be viewed as an important consideration when existing employment space is lost through redevelopment and re-provided in a different form. Such a change might retain – or even increase – the *numbers* of jobs on site, but mark a significant change in the *quality* of jobs available. Analyses of local economies could address working conditions, the accessibility of jobs, and opportunities for training and progression as ways into understanding the quality of jobs in local economies.

Another area of concern – particularly for local communities, represented by their local politicians – is the extent to which areas are providing ‘jobs for local people’. This is difficult to research accurately through employer surveys alone. Where questions in surveys or interviews have been asked, there tends to be a lack of consistency between questionnaires in terms of the categories chosen; i.e. how does one define ‘local’?

One final point here is that the data collected on employment tends to be employer-led. So, for example, the data that the GLA collects on employment in high streets has to date recorded only PAYE-employment. LSE researchers working on the *High Streets for All* project have, in contrast, also been collecting self-employed, cash-in-hand, family workers, which is more revealing. Similarly, capturing the economy and employment that is not business-premises-based but takes place in people’s homes (including professional practices, garment-making, couriering from home, cleaning and caring) is more challenging and much of it remains hidden.

7. Conclusions and recommendations

This small research project aimed to shed light on the economy of London: how it is conceived, studied and understood, especially by those citizens, communities and professionals involved in planning and public policy. We have surveyed all the recent studies we could find and hope that this survey itself will be a valuable and thought-provoking resource for these groups of readers.

An implicit theme which runs through this report is the problem of arriving at a clear definition of what exactly the local economy is. Unlike other planning issues, such as housing or waste management, the ‘economy’ is less tangible, consisting of a bewildering array of interdependencies which cannot easily be captured or conceptualised. Divergent views can be discerned in the studies which have been reviewed. Nevertheless, each provides a valuable window into certain aspects of local economies. The related question posed by the geographer Doreen Massey (2013) – ‘what is an economy *for*?’ – might be a useful starting point for community researchers to start thinking about which aspects of their local economy are of particular importance.

Here we collect the main threads of our findings and offer some more-or-less tentative proposals about what should happen next. The way we (Londoners) deal with these issues is very important and very urgent. The economy has long been dynamic and faces major new challenges in the coming few years, notably from changes in business rates and the impact of whatever happens to Brexit. While there is much talk of a ‘smart city’ there are key respects in which London is not very smart. We know where every bus and taxi is, we can map in real time an enormous range of transport and transaction data. But we don’t have data, except in census years, on the links between home and work, how commodities and services flow between producers and users nor anything much about the emotional and social factors surrounding people’s working lives.

These conclusions are grouped under the following headings:

- Concepts and categories
- Methods of study
- Responsibilities and organisations
- Research priorities.

We don’t repeat citations of sources that have already been given in the main text above.

7.1 Concepts and categories

Statisticians, planners and economists need to give more thought to some of the key concepts which are used or needed in the analysis and understanding of local economies at various scales. In particular our survey has found the following to be problematic:

Industry and the industrial classification. The standard statistical classifications (SIC) used in National Income Accounts are increasingly dated. Individual enterprises are classified by their main product (vehicles, restaurant meals, education) but so many enterprises now have multiple products; outsourcing makes some ‘industries’ appear to shrink and others to grow although the same work is being done; and many distinct outputs like movies or operas or meals are the product of multitudes of inter-linked activities as distinct enterprises classified to separate ‘industries’. We are not proposing an answer to this problem but instead draw attention to the difficulties faced by most of the studies we read and by the many student projects we have learned from.

Interconnections. The counterpart of the industry problem is the almost complete lack of data on the flows of goods and services through the economy. The issue is important, especially where policy decisions depend on assessments of how critical links are to the effectiveness of the economy as a whole. Some economists work on ‘input-output’ analysis which tries to understand these relationships in the economy as whole, or occasionally at a regional scale. Local economy studies often produce powerful anecdotes about interdependencies within an industrial estate or a high street, or the response times of lift

repair engineers or of video post-production firms. But the levels are always disconnected. The spatial potentialities of VAT data have never been exploited, as far as we know. Progress on this front would greatly help with many planning decisions and also help to realise the ambitions of the circular economy where waste streams become inputs to benign re-use.

Building and property types. Many of the studies we have surveyed pay attention to the age and condition of buildings, to building morphology (terrace, shed, multi-storey factory), conservation interest, real-estate sectors (office, shop, industry) and planning use classes. Some of these categories can be recorded from direct observation or from satellite or street-view images but much is hidden. Oddest of all, perhaps, is that the planning status of premises cannot be read off any map: it depends on what permission was last granted and that data is locked away in (often paper) files. Many of our studies have made heroic efforts to devise categorisations to meet their needs and circumvent the problems but the situation is un-coordinated and messy.

People, workers. Discovering who works in a defined area is conceptually as well as practically difficult. Many studies confine themselves (especially if using official statistics) to employees, or if based on survey work start from the business premises, but growing numbers of people are self-employed, or family workers, or indeed voluntary workers, and thus omitted. All the studies we have looked at overlook volunteers and unpaid workers (e.g. many carers) and also disregard those working from home, whether they are professionals, rag trade operatives, drivers or small-scale construction workers. Even where there are statistics they are normally not available at a small geographic scale for confidentiality / privacy reasons, or available only to people within public authorities. Many of the studies reviewed, however, have sought interview information on worker numbers, often with supplementary information about ethnicity and places of residence. The latter poses extra problems: should one ask about distances or travel times or use some concept of 'local'?

Value. Aggregate economic statistics follow the rules of National Income Accounting in estimating Output and Value Added: that's how economic activity is quantified, and gives rise also to measures of productivity (GVA per worker or per hour worked). The concept derives from market prices of outputs (minus the market prices of inputs where Value Added is being estimated). However, the whole concept has come under attack by economists and environmentalists because of the way these values embody all the imperfections of the market, omitting environmental impacts, and the effects of scarcity and rents and power relations in supply chains. Techniques have been developed to modify these standard measures, for example through estimating Social Rate of Return from specific activities, but they don't yet enable community groups or local authorities to produce quantified evidence on the social value of activity to counterpose against the imperatives of market forces.

7.2 Methods of study

The main part of our report described the rich range of methods employed in recent local studies in London, studies ranging from quick desk-top study and short site visits for visual observation, to elaborate (and labour-intensive) interview exercises by well-resourced public bodies (e.g. OPDC) or groups of students, and the rich ethnographic work led by academics and researchers. The strengths and weaknesses of these various approaches have been discussed in the main text above. However, it has not been a case of reviewing methods in a straightforward manner to find the 'best' approach to researching local economies. The approach taken aligns with the both the research objectives of the leading body, and most crucially depends on the resources available.

A key conclusion, however, is the lack of connection between the kind of large-scale, London-wide, analysis conducted by the GLA or occasionally by academic research projects - which typically uses official statistics - and the great range of localised studies reviewed here. We consider that strenuous efforts need to be made to cross-fertilise between these levels of analysis. How can local studies better inform decision making at a strategic level and how can strategic studies make better use of local data and knowledge? We (via the Just Space Economy and Planning Group) have been involved in consultations during the

preparation of the Economic Evidence Base for London Planning by GLA Economics and are glad to have helped that document to present a much richer picture of the city. But there is much further to go.

7.3 Responsibilities and agencies

It has been clear from our workshops and studies that there is no public (or private) body with a clear responsibility to undertake and maintain the multi-scale and multi-faceted studies of the London economy which is required if planning at the various scales is to be ‘evidence-based’. GLA Economics is the closest, but has hitherto focused mainly on the aggregate scale and on leading sectors. The LEAP (London’s LEP) does not yet seem to have a developed capacity to do this sort of work, though some episodic studies have been fed in to it via London First, a body representative of major businesses. The Boroughs, so far as we are aware, lack substantial economic development staff and their planning staff are thinly spread and mostly tasked to fulfil statutory development management and plan-making obligations. On the private side we are not aware that the CBI or the LCCI or the FSB undertake the kind of work we have in mind.

Within City Hall it is our impression that GLA Economics, the Regeneration and London Plan teams and GLA Intelligence would probably benefit from more joint working. For local business and residential communities it is thus doubly difficult to access advice and data, although such groups often have a better grasp of aspects of local economic life than the governmental bodies they deal with. London bodies should give thought to these problems. In the mean time we have three suggestions for small initiatives that could help, each of which could be hosted by the university sector with some additional resource:

- (i) Periodic workshops bringing together interested residential and business communities, borough, GLA staff and perhaps others (FSB, LCCI) to exchange experiences and discuss common problems.
- (ii) An online repository of studies which have been completed by public bodies, consultants, academics and students. This would facilitate aggregation, reduce the need for the wheel to be re-invented for each study, and build a valuable research resource. The material we have collected and reviewed here could be a start, subject to copyright consents.
- (iii) A toolkit that communities/local authorities/students etc can use, ensuring that each local study is not starting from scratch (standardised business surveys/questions could be asked), with direction on where to obtain data (on, for example, business rates, local employment).

There is a big agenda here for the planning and local economic development professions to work on, in dialogue with economists and statisticians. These challenges we discuss further elsewhere (Ferm, Edwards and Jones 2017 forthcoming).

7.4 Research priorities

Many of the issues raised in this summary are themselves researchable and we hope that this report stimulates useful work. In addition, we should end by drawing attention to the following:

Longitudinal study. We have surveyed a rich field of snapshots of particular places at particular times but no longitudinal studies. It is almost impossible to evaluate past policies or devise evidence-based plans for the future without better understanding of how the economy changes and how it responds to shocks and policy changes, especially to displacements. What happens when logistics are relocated from Nine Elms to Purley? What has become of all the enterprises which were on and around the railway lands at King’s Cross before the recent redevelopment? What happens to all the enterprises on and behind a high street when it is “redeveloped in depth”? Serious longitudinal studies are essential.

Value. There was a consensus in the workshop and through broader discussions during the course of the project that further work on alternative ways of measuring ‘value’ is required. This includes the measuring of economic value in terms of jobs, revenue, spend, and business rates, and the measuring the social value of local economic activity. This could

draw on the pioneering work of NEF and the forthcoming GLA commissioned research (led by the LSE) on High Streets. This work could also address the issue of environmental value and impact, which is another strand of important work required. The ever increasing concentration of certain sectors of the economy – such as financial and business services - in the CAZ, and the simultaneous pushing out of the remainder of the economy to increasingly peripheral locations increases commuting and freight journeys, which has social, environmental and public health impacts. The GLA has at last dropped its long-standing resistance to modelling and conditional forecasting so it should now be able to anticipate the transport consequences of hypothetical land use changes and there will be important research to be done in developing the best methodologies and tools to implement them at various geographic scales.

Future demand. The Boroughs and the GLA do not appear to be working with an informed understanding of future demand and how this could change as a result of changing technology, demographics, working and living patterns etc. Employment projections, based on extrapolating past trends, tend to be the primary way public authorities get a handle on what the future demand for workspace will be. These projections do not allow for a more nuanced scenario-based approach to understanding the future, which could take into account industry-specific knowledge on the likely expansion of some sectors and capture the paradigm shift that is going on in the nature of work and employment, to consider how this will impact land use patterns and demand for premises.

Finally, there is an important design research challenge associated with the issues explored here. Given the imperatives to increase the supply of housing in London (not least on land now used for ‘economic’ activity), research should explore the scope to mix industrial, commercial and residential uses. A focus on the specific activities carried out by firms might reveal that many manufacturers are ‘cleaner’ than might be expected. We are aware of pioneering work by OPDC and Barking & Dagenham and there are examples of existing (such as 318 Green Lanes) and planned (Camley Street) schemes which seek to integrate new residential use with existing businesses, but these have not yet been recorded and analysed in a systematic manner. Further research and development could explore the issues raised by (for example) different configurations of horizontal and vertical separation; the impacts of different activities in terms of noise, smells and vehicle movements; and the effect on land values of various mixes. This is one of the fields where student work is very fruitful.

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Appendix 2: Revealing Local Economies workshop summary

1 February 2017, 15h00-18h00

Room 213b, 2nd Floor, 132 Hampstead Road, London NW1 2PS

Workshop participants

Name	Organisation
Julia Atkins	London Metropolitan University
Sonia Baralic	Former UCL
Elena Besussi	UCL Bartlett School of Planning
Stephanie Brewer	LB Islington
Robin Brown	Hayes Community Forum/Just Space
Jane Clossick	CASS Cities, London Metropolitan Universit
Hollie Deverell	CASS Cities, London Met
Michael Edwards	UCL Bartlett School of Planning
David Fell	Brook Lyndhurst/JSEP
Jessica Ferm	UCL Bartlett School of Planning
Rob Harris	Ramidus Consulting
Edward Jones	UCL Bartlett School of Planning
Dave Lawrence	CAG Consultants
Kevin Logan	MacCreanor Lavington
Alex Marsh	GLA Regeneration team
Calum McCulloch	Former UCL
Heike Neurohr	Hawkins Brown
David Pendlebury	AECOM
Naomi Pomfret	LB Barking & Dagenham
Ekaterina Proskurina	UCL MSc Urban Design & City Planning
Wafaa Salim	CASS Cities, London Met
Morvi Sarvghadi	CASS Cities, London Met
Jamie Simpson	LB Barking & Dagenham
Matthew Waite	GLA Economics team
Louise Bunout	LSE masters student
Apologies:	
Mark Brearley	CASS Cities/Kaymet
Ashley Dhavani	UCL Bartlett School of Architecture
Suzanne Hall	London School of Economics

Paul Hunter	Smith Institute
Levent Kerimol	GLA Regeneration
Lauren Laviniere	OPDC
Melissa Meyer	We Made That
Jenny Robinson	UCL Geography
Graeme Sutherland	Adams-Sutherland Architects
Roy Tindle	Charlton Riverside/JSEP
Laura Vaughan	UCL Bartlett School of Architecture
Gregory Openshaw	AECOM

AGENDA

- 15h00 Arrive
- 15h05 **Welcome and project introduction** - Michael Edwards
- 15h10 **Documentary review of existing studies & emerging thoughts** - Ed Jones
- 15h20 **Presentations of local economy study work on the Old Kent Road**
UCL and CASS Cities students
- 15h40 **Workshop participant introductions**
2 minutes from each participant (who we are, what we have worked on/are working on, motivation for coming to the workshop, any initial thoughts on the theme of the day)
- 16h20 Break and refreshments
- 16h35 **Workshop group discussions:**
 - **GAPS** in knowledge, unanswered questions, what is not being measured?
 - **METHODOLOGIES** – comparing approaches, challenges, limitations/issues, innovations
 - **IMPACTING DECISION-MAKING** – role of local economy studies in planning, research agendas developing a ‘tool-kit’
- 17h20 Report back
- 17h45 Next steps and close

KNOWLEDGE GAPS

Demonstrating ‘value’:

- We need to better understand what is the value of a certain existing activity/economy? Why do we need that there versus somewhere else? We have a tendency to look at local economies in isolation without looking at the wider economy. We need to be better about quantifying value.
- Value = £ OR Value = things that we cherish
- What would ‘value’ mean to the GLA economics team?
- How to measure value? Can economic value be given to nonmonetary values?

- Suzanne Hall's measurements using headings of 'diversity', 'longevity', 'give', would be useful to explore.
- Other values of the economy get overlooked, for example diversity. We need to be able to quantify value of local economic activities.
- Not just business space that is lost, it is the life that is generated around it. Cannon Street on a Sunday is not a nice place. Human life should be something to value.
- Can we explore value over time? (short term vs long term value). Long-term value often underestimated. Resilience, capacity as a broad economy to thrive.
- Look at the value of the sectors as a whole (e.g. printing or builders merchants) rather than industrial businesses. Cross borough approach also required.

What are we missing?

- 'Hidden' businesses within businesses (without a public face) often not picked up
- Human side of vibrant areas with strong local economies needs to shine through in these studies. The contribution of businesses and the human activity they bring and promote between businesses and customers, between businesses themselves, linking to civic life. This tends to get lost. Need a way to measure and value this.
- Rise of self-employment. Uber drivers, people on zero hours contracts. What kind of land use do they need? Not necessarily about retaining existing industrial.
- Clusters – how to connect new cluster with existing economy
- Studies don't sufficiently address who is employed, and how they are employed? Even getting data on hours worked per employee is difficult. Especially when people work variable hours.

Mixing industry and residential:

- Developers/investors still not willing to mix with industry. We need to know more about typologies of buildings required to successfully integrate industry and residential, focusing on long-term adaptability of buildings.
- We need to know more about compatibility of various industrial uses with residential from a pollution/noise point of view.
- We need a better understanding of what is going on inside buildings. Often activities are 'cleaner' than we expect. Such knowledge can then be fed to developers who may be more open to mixing with such knowledge.
- Need therefore a new way of thinking about mixed use development. With new technologies, we can co-locate these things. But need to think about typologies/need for adaptability.
- We only stopped considering this 40 years ago. Loss of city life.

Other:

- Understand and collect evidence for implications of e.g. moving industry out of London. How does the economy work at that scale? We need this info to make strategic decisions.
- Need to pay more attention to what is there and how it can grow
- Often local intelligence is lacking, so we rely on property market reports submitted as part of planning applications. Often very limited, limited scope of review
- Is a 'comprehensive' view of the economy a chimera which cannot be fully grasped? Yes.
- There is a need to not only address the overall picture, but to also address the details of data. Remember that every business contributes to the overall figures.

- The ‘local economy’ is subjectively defined by various groups. There are different points of view, based on the benefits of taking a given approach.
- Similar approach to employment land for industrial, office across all boroughs. All 33 boroughs trying to achieve the same things. One pie. Everyone wants a tech cluster.

METHODOLOGICAL ISSUES

- Too many assumptions are made, we need to start with challenging assumptions. For example: How scarce is land in London really? London is the least dense city of all the major cities. Why can’t we accommodate everyone and all land uses – industry AND housing.

Scope:

- Different approaches required for different areas and situations
- Local studies make the everyday economy tangible. They provide an imperfect reflection of what the economy actually is.
- But comparisons between the local picture and the wider scale is what buys you influence. For example, there is scope to use GVA per SIC category to demonstrate the economic impact of a particular area. This also allows areas to be compared.
- Useful exercises could be designed to shed light on what London cannot do without – for example, take 10 restaurants and map their connections.
- How is a line around a study drawn?
 - Usually it’s down to the budget and project (time) constraints.
 - Often ‘property market area’ is used – there are commonly defined boundaries around property market areas, which are used by businesses themselves when they carry out market searches.
- Unit of focus often wrong. Need to think about functional economic areas (FEAs). FEA of London is 20million people. Direction of GLA is CAZ is king, and the rest of that area is for people to be funnelled into the CAZ. Industrial gets swept aside – not relevant.

Time:

- Nothing is static in London – there is a rapid pace of change which means that statistics collected for an area (i.e. Hoxton IMD data, Elephant and Castle) are soon out of date. In longitudinal research, this might mean that narrow intervals between data collection would be revealing.
- Some longitudinal studies (even just for case study areas) could be very valuable to reveal dynamics.
- Time horizons for firms: some can move easily; others need years to justify heavy fit-out / machinery costs.

Data/trends:

- Numbers are ‘proper data’. Analysis of secondary data is a valuable avenue for research. Numbers can be used to connect up the local and strategic, and could be powerful in contesting the ‘housing agenda’.
- There is a need to consider housing and socio-economic data in tandem with investigation into employment areas.
- Trend data: Our usual way of planning based on extrapolating past trends doesn’t seem sensible. We don’t know what the future will look like – there is a knowledge gap re future demand/working patterns/accommodation needs etc.

- Part (or much?) of the ‘decline’ in manufacturing is due to abolition of industrial space (strategic and other) by DM and policy decisions; another part of employment decline is due to productivity growth which is not so bad in much manufacturing. This all invalidates “trend-based” projection of demand.
- Also, we do not know how the availability (or lack) of accommodation has affected things in the past e.g. led to loss/displacement of businesses and thus jobs, affecting past trends. Need to consider policy interventions and how they might have impacted on trends.
- Difficult to follow trends in land values. Poor information.
- It is not a very SMART city in which so much big data does exist but is not available. Some is hidden for confidentiality reasons (HMRC, VAT, VOA) and more is the proprietary capital of surveying firms (office, corporate retail, etc)

What do we want to know/measure?

- We need to find a way of measuring Interconnectedness.
- We need to understand what is the **net** impact across London (of say loss of businesses in one location)?
- Not just about new jobs created on one site. We need to look at how many other jobs does this one new job create. Also the quality of jobs. All jobs are not the same. Pay, progression and training anecdotally much better in some firms than others.
- How much damage is suffered when firms of various kinds are displaced/ priced out? Case studies again.
- Brief mention only of ethnicity. Important in labour force to help understand discrimination etc; also that some enterprises and even clusters have a strong orientation to ethnic user groups, supplies (Latin, South Asian, Chinese, Vietnamese examples known to people.) A forgotten aspect of the “global city”. Globalisation from below.

Categories:

- Employment land reviews and SHLAAs taking place in silos. No cross-overs. LPAs have to then make a judgment.
- Different studies use a range of different categories for talking about the same thing re contributors to the local economy. This makes it difficult to compare between studies.
- Business clusters often over-looked through categories. With categories, it becomes difficult to show interrelationships.
- We need usable categories so that research can be combined more easily. Need common definitions of some categories to facilitate aggregation of surveys.
- What is ‘tech’?
- SIC categories useless. Having a general categorization that we could all use. So all future research could be compared properly. SIC codes are industry defined. What we do is ‘activity defined’.
- Impact categories can be more important than SIC or land use categories: noise, vibration, HGV movement generation; traffic generation from suppliers, customers, staff.
- Activity based approach to land use rather than a UCO based approach to land use. UCO just doesn’t do it any longer. Need to understand how buildings are used. UCO data buried in LA files anyway.
- Are we interested in the activities that occupy space (temporary) or the buildings (long term, adaptable)?

MOVING FORWARD

- There needs to be a vision for the economy in London – this should be based on the 33 borough's (differing) views of growth, and the London Plan.
- Use students to collect data – they are free.
- There is a need to 'pool' studies – a central point where they can be deposited and viewed.
- Businesses might assume more importance in decision-making when business rates funds are retained at the local level – though this could favour the businesses paying higher business rates.
- Tax breaks? Why is residential land sacrosanct? Need to find ways to encourage landowners of all kinds to develop – both new employment accommodation and new housing. Imagine if every Victorian street had double the number of dwellings on it?
- Two approaches to London's economy at this table – London's economy as for Londoners vs London's economy as powerhouse of the UK. These are in opposition. We need research into what might happen if London was no longer a powerhouse.
- A smaller economy (in GDP terms) might be preferable if it contained less in-work poverty.
- How do we build an adaptable city for the future? This is a design problem. We need types of buildings that can be converted easily including from residential back to other uses.
- Land use designations – how can these accommodate the industries of the future?
- Housing and economy studies tend to be conducted in isolation – need to be brought together.
- Displacement/longitudinal effects. What happens when businesses are displaced? Research. Some work done on this in UDCs. On the other hand, what is the longer-term impact of intervention?
- How (if at all) can local economy studies contribute to understanding of how the need to travel is increased/reduced. (Staff and service users)

OTHER ISSUES

- Conflict of interest between local authorities as planners and local authorities as pressured to develop land for housing
- Could a reform of Council tax lead to a more efficient use of land for residential housing and, therefore, reduce the pressure on employment/other land uses?
- Huge problem of class. The people making the policy are nothing to do with the world of the car-breaker/greasy spoons, low-paid insecure work generally.
- Quantity of jobs in OAs is the focus.
- Model of development cannot deal with the existing.
- Not an overt policy to lose jobs, the policy is to build houses.
- Productivity problem in the country.
- Procurement issue. How can we incentivize individual landowners to make money in other ways? International examples?
- Do sheds on the Thames have a role? They don't need to be there. You don't need a concrete breaker there. Need to distinguish which do and which don't. Some densities of use don't have a role that close to central London. Where do you 'need' to be for your customers? On the other hand, it's not just about efficiency.
- Housing workers is also really important. Cleaners, low-pay workers. Those jobs go hand in hand with housing.

- Land designation – out of fashion? How do we designate land that is fit for economies of the future?
- Land values are king. Do we see pricing as the mechanism that should drive development?
- Not an issue of measuring value. Now we have a housing issue.
- LPA officers often under pressure to find data which can illuminate (or support) the priorities of elected members – notably “jobs for local people” / “good quality jobs”. We are not very good at responding to this problem yet. These political priorities are not trivial or (purely) parochial. Community groups often have these concerns too.
- What about all the economy hidden inside people’s homes? Firms including professional practices, outworking garments, Uber/couriering run from home; Google maps reveals a few of them where locations flagged in suburbs.
- No discussion (check) of gender dimensions of employment analysis or how it is handled in policy-making or IIA.
- Happy and unhappy mixes of homes and various kinds of economic activity. Serious re-think required. Noise from industrial processes / trucks / sound systems / outdoor drinking and dispersal from venues / ventilation systems. Cuts across industrial / office / retail / culture categories and planning can’t handle it. One person mentioned scope for restrictive covenants to prevent new residents in mixed areas from complaining or demanding peace and quiet. (.c.f. rural issues like church bells, animal noise)

Appendix 3: Roundtable summary

Revealing Local economies project

Meeting with Laura Vaughan (LV), Suzanne Hall (SH), Jenny Robinson (JR) (+ Ed/Michael/Jess)

27 Feb 2017

SUMMARY

Points for our review paper (methodology/knowledge gaps):

- Many of these studies focus on business premises and ‘what’ is going on (activities, what is being produced etc). Misses the ‘who’. Who is doing the work, what is the nature of that work, how is this changing? There is a paradigm shift going on, but studies don’t reflect this.
- Measuring collective business rates in a locality could be a powerful way to (a) demonstrate value in economic terms, (b) start developing a collective business voice. But issues of working through raw data from local authorities. Resource-intensive, and requires skills.
- The paper represents a ‘first-stab’ at bringing together relevant studies and their methodologies on revealing local economies. But during the course of the work (workshop/meetings) it became clear that there are many others (outside core consultancy/architect firms formally ‘commissioned’ to do such studies) especially in academia who are doing relevant work from different perspectives (architecture, entrepreneurial studies, planning, health, mobility) that may have a bearing on this work.
- Include use of Google street view as methodology (see LV’s work on this)

Clear recommendations for the review paper:

- Develop a toolkit that communities/local authorities/students etc can use, ensuring that each local study is not starting from scratch (standardized business surveys/questions being asked), direction on where to obtain data (on, for example, business rates, local employment).
- Set up a repository for local economy studies in London (UCL to host?)
- Further work on ‘value’ required (collaboration between academic/community researcher). Measuring economic value in terms of jobs, revenue, spend, business rates (others?), measuring social value.
- Further work required on targeting policy – what are the critical policies that need addressing? Who are the key influencers? More collaborative work required between different researchers working on detailed studies in different parts of London. Important to help policy makers understand what other options there are to meet their policy requirements whilst retaining local economies.

Appendix 4: Survey question examples



Cass Cities

WHERE IS
TOTTENHAM'S
ECONOMY?
SURVEY QUESTIONS

Workspace, business or organization name:

.....

Type:

Address (Unit number, street number, road, postcode):

.....

How long has the business or organization been going?

How long at this site?

Where are products sourced (if business) or sold (if manufacturer)?
.....

How many employees (full time, part time) and where do they live?
.....

Where are you from?

What languages do you speak?

Where do you proprietor live?

What did you do before?

Name of proprietor (optional) and contact information (email/phone)
.....
.....

What are the ownership arrangements here? (License holder, leaseholder, freeholder (name if not freeholder) or some other arrangement? How many years are left and do you have the right to renew?
.....

Photos allowed? yes/no

Other comments/notes (street presence, internal subdivisions):

Source: Jane Clossick, 2014 p. 322

Employment Cluster Survey Questionnaire

Business Cluster Number (URS): Your Initials: Date:

List any London Plan SIL and/or UDP Employment use Allocation and/ or Site Proposals (desk based).....

The business premises typologies in the cluster are best described as (multiple ticks possible):

- | | |
|---------------------------------------------------------------------|----------------------------------------------------------------------------------|
| <input type="checkbox"/> Business district | <input type="checkbox"/> Waste mgmt / Recycling / environmental industrial sites |
| <input type="checkbox"/> General Industrial estate / business areas | <input type="checkbox"/> Town centre |
| <input type="checkbox"/> Warehouse / distribution Park / wholesale | <input type="checkbox"/> Incubator / SME cluster |
| <input type="checkbox"/> Local shopping centre | <input type="checkbox"/> Local Office Centre |
| <input type="checkbox"/> High quality Business Park. | <input type="checkbox"/> Local Office Centre |
| <input type="checkbox"/> Storage | <input type="checkbox"/> Car Repairs |
| <input type="checkbox"/> Other (describe any other uses)..... | |

What is/are the main employment and/or other significant land-use/s?

(Mark land uses on map using key in manual)

Mark clearly and precisely any revisions to cluster boundaries on the map (see manual instructions).

Character of premises within Cluster

(Mark on the survey base map the boundaries of distinct areas of premises character within the cluster using key in manual)

Quality of environment and public realm

- Very good
- Good
- Poor
- Very poor

Comment on quality of environment

Access to facilities and amenities

- Very good
- Good
- Poor
- Very poor

Topography issues

- Yes
 No

If yes, comment on topography and illustrate on map

Ecological issues

- Yes No

If yes, comments on ecology and illustrate on map

Bad neighbourhood uses**Businesses in the business cluster cause:**

- None
 Noise pollution
 Air pollution
 Smell
 HGV traffic
 Significant car traffic
 Other (please comment)

Comments

Physical site constraints in cluster? (i.e. access from local road, layout issues, incompatible land use, environmental/nature conservation)

Comment (and mark on map).....

The cluster lies within close proximity to / has impact on (*multiple answers possible*)

- Residential or Community uses
 Town centre
 Local shopping centre
Other.....

**Servicing of businesses in cluster**

(*multiple answers possible*)

- Road side loading/unloading
 Off road loading/unloading
 Loading bays

Comment on servicing of businesses

Servicing is adequate for the uses within the cluster

Yes No Don't know

Parking facilities

(multiple answers possible)

- Dedicated parking within cluster
- On street parking
- Yellow / double yellow lines
- Red route
- Controlled parking zone/paid parking

Comment on parking facilities **give reason** for judgment on adequacy of parking provision

Parking provision is: Adequate Too little Too much Don't know

Strategic road access (trunk roads) (Observation and desk based).....

.....

Access to public transport (Observation and desk based PTAL check).....

.....

Condition of Buildings - % of buildings within Cluster in:

Very Good _____ % / **Good** _____ % / **Poor** _____ % / **Very Poor** _____ %

Total vacant and available B1/B2/B8 floorspace quantum actively marketed within cluster

B1 B2 B8 (Sqm)

(Take note of any property market agent information on vacant and available floorspace and specification)

Are there any Vacant developable sites/ Derelict buildings within cluster

(Y/N):..... If **yes** mark clearly on map. **What % of the cluster** land area do they constitute?
..... %

Has any part of the Cluster been redeveloped in the past ten years for residential/ mixed uses? Or other uses other than those covered by the B use class sectors? (Y/N):..... If **yes** mark on map

Are any areas within the cluster suitable for adaptation into workspace suitable for Small and Medium Enterprises (SMEs)?

.....
.....
.....

Does the cluster contain a notable presence of high-growth sector occupiers? (Y/N)

If yes please
name.....

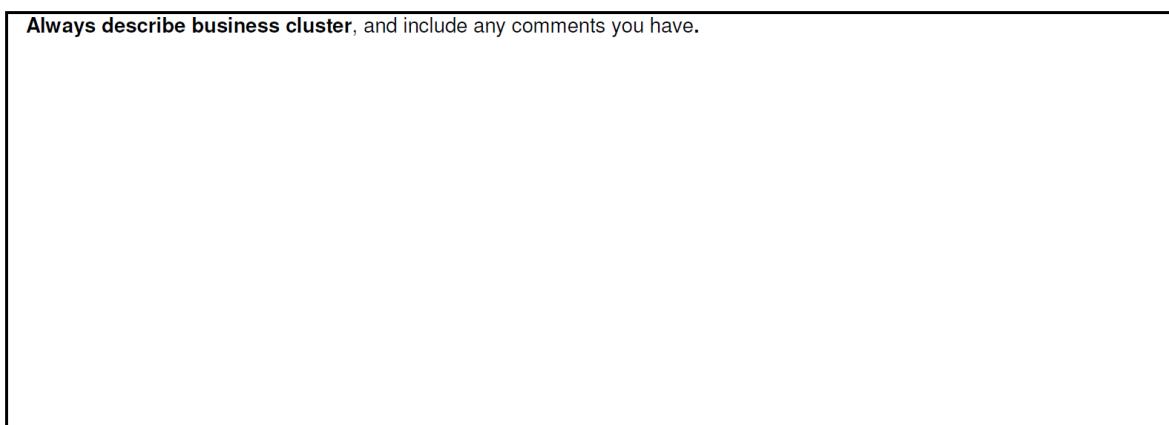
Additional possibilities for intensification / redevelopment (Mark clearly on the cluster map, any areas which show potential for intensification and add any additional comments below)

.....
.....
.....
.....

Photographs

Image number(s) _____ / _____ / _____ / _____ / (min. of 1 image per cluster)

Always describe business cluster, and include any comments you have.



Source: URS, 2010 p. 150 – 153

1	What do you do/produce here? What are your business specialist skills?					
2	How beneficial is your current location to your business?					
	Essential	Beneficial	Not essential			
3	Is the business an:		Independent business Headquarters for other sites	Branch or subsidiary	Franchise	Other (specify)
4	When was your business first established?					
5	For how many years have you been located in the Old Kent Road and where were you located before?					
6	What is the tenure of your premises?					
	Freehold	Leasehold	Sub-lease	Licence	Don't know	Refused
7	Where are the majority of your suppliers based?					
	Old Kent Road	Greater London	UK	Worldwide		
8	Where are the majority of your customers based?					
	Old Kent Road	Greater London	UK	Worldwide		
9	Approximately how many employees do you have working at this site?					
10	What proportion of your workforce live locally? E.g. Southwark, Lewisham, Lambeth					
11	In the next year, do you anticipate that the total number of employees on this site will:					
	Decrease	Remain the same	Increase			
12	In the next year, do you anticipate that the space needed to run your business will:					
	Decrease	Remain the same	Increase			
13	Do you plan to relocate within the next year?					
14	Are you aware that your site is part of / adjacent to the Old Kent Road opportunity area?					
15	Have you been contacted by Southwark council regarding this?					
16	Have you recently been approached by a developer about this site?					
17	Do you anticipate that development in the Old Kent Road opportunity area might impact your business?					

CASS Cities + Assemble Old Kent Road Observation Survey

1	Borough	Southwark / Lewisham
---	---------	----------------------

2	Street number(s)	
3	Street name(s)	
4	Business / Unit number	
5	Business park	
6	Business name	
7	Business email / telephone	
8	Business website	
9	Building type	<ul style="list-style-type: none"> • Purpose-built industrial shed (double height loading bays / service yard) • Pre-1945 factory, depot, or warehouse • Post-1945 industrial building (excl. purpose built industrial shed/distribution centre) • Yard - no building or small buildings • Office building • Railway arch • Shop / café / restaurant / pub / takeaway in high street shopping parade • Retail development with car parking (supermarket, retail warehouse) • Pre-war school • Post-war school (1945-2000) • Modern school (post 2000) • Other, specify:
10	Street elevation	Y / N
11	Unit shared by multiple businesses?	<p>Y / N Estimated number:</p>
12	What are the uses of the external space?	<ul style="list-style-type: none"> • Car parking (employees) • Car parking visitors • Loading bays / areas • Storage uses • Green space / recreation space • No external space • Other:
13	Is the business owner of an apparent ethnic minority?	Y / N
14	Are the majority of employees of an apparent ethnic minority?	Y / N
15	Is the business compatible with other uses? (work hours, noise, extensive truck use, chemicals, exhaust from operation, dust emission etc.)	<ul style="list-style-type: none"> • Residential shared use • Residential adjacent use • Office / commercial shared use • Office / commercial adjacent use
16	Additional observations	

Appendix 5: SIC (2007) main sections

Section A Agriculture, Forestry and Fishing

Section B Mining and Quarrying

Section C	Manufacturing
Section D	Electricity, gas, steam and air conditioning supply
Section E	Water supply, sewerage, waste management and remediation activities
Section F	Construction
Section G	Wholesale and retail trade; repair of motor vehicles and motorcycles
Section H	Transportation and storage
Section I	Accommodation and food service activities
Section J	Information and communication
Section K	Financial and insurance activities
Section L	Real estate activities
Section M	Professional, scientific and technical activities
Section N	Administrative and support service activities
Section O	Public administration and defence; compulsory social security
Section P	Education
Section Q	Human health and social work activities
Section R	Arts, entertainment and recreation
Section S	Other service activities
Section T	Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use
Section U	Activities of extraterritorial organisations and bodies

Appendix 6: Use Classes Order

Part A

A1 Shops - Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes.

A2 Financial and professional services - Financial services such as banks and building societies, professional services (other than health and medical services) and including estate and employment agencies. It does not include betting offices or pay day loan shops - these are now classed as "sui generis" uses (see below).

A3 Restaurants and cafés - For the sale of food and drink for consumption on the premises
- restaurants, snack bars and cafes.

A4 Drinking establishments - Public houses, wine bars or other drinking establishments
(but not night clubs).

A5 Hot food takeaways - For the sale of hot food for consumption off the premises.

Part B

B1 Business - Offices (other than those that fall within A2), research and development of products and processes, light industry appropriate in a residential area.

B2 General industrial - Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste).

B8 Storage or distribution - This class includes open air storage.

Part C

C1 Hotels - Hotels, boarding and guest houses where no significant element of care is provided (excludes hostels).

C2 Residential institutions - Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.

C2A Secure Residential Institution - Use for a provision of secure residential accommodation, including use as a prison, young offenders institution, detention centre, secure training centre, custody centre, short term holding centre, secure hospital, secure local authority accommodation or use as a military barracks.

C3 Dwellinghouses - this class is formed of 3 parts:

C3(a) covers use by a single person or a family (a couple whether married or not, a person related to one another with members of the family of one of the couple to be treated as members of the family of the other), an employer and certain domestic employees (such as an au pair, nanny, nurse, governess, servant, chauffeur, gardener, secretary and personal assistant), a carer and the person receiving the care and a foster parent and foster child.

C3(b): up to six people living together as a single household and receiving care e.g. supported housing schemes such as those for people with learning disabilities or mental health problems.

C3(c) allows for groups of people (up to six) living together as a single household. This allows for those groupings that do not fall within the C4 HMO definition, but which fell within the previous C3 use class, to be provided for i.e. a small religious community may fall into this section as could a homeowner who is living with a lodger.

C4 Houses in multiple occupation - small shared houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom.

Part D

D1 Non-residential institutions - Clinics, health centres, crèches, day nurseries, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, church halls, law court. Non residential education and training centres.

D2 Assembly and leisure - Cinemas, music and concert halls, bingo and dance halls (but not night clubs), swimming baths, skating rinks, gyms or areas for indoor or outdoor sports and recreations (except for motor sports, or where firearms are used).

Sui Generis

Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: betting offices/shops, pay day loan shops, theatres, larger houses in multiple occupation, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses, amusement centres and casinos.

(from www.planningportal.gov.uk)