

Change and perception of change at King's Cross

Summary of surveys of households and enterprises

King's Cross Partnership

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July 2002

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Change and perception of change at King's Cross

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1. Introduction

In December 1995, the Government Office for London (GoL) approved funding of £37.5m over a period of seven years to complement expected transport and development investments and to regenerate King's Cross by: promoting small businesses, fighting crime, improving the physical environment, encouraging the creation of jobs, improving public sector housing, improving education and training, and generally enhancing the quality of life in the area.

In the Summer of 1999, the research team at the Bartlett School of Planning, University College London, was commissioned by the King's Cross Partnership (KCP) to undertake a four-year programme evaluating and monitoring the process of urban regeneration in the area. Two major surveys, one with households and the other with businesses, were conducted from May 2000 to June 2001 with the purpose of establishing a mid-term baseline of the area.

A planned second cycle of surveys has been deleted by the Partnership because of the later-than-expected completion of the CTRL and because the results would not all be available before the Partnership winds up in March 2003.

This short report summarises findings from the two major surveys of 2000/1 - of households and of employers - focussing especially on questions about how respondents perceived the area and the work of the Partnership. These aspects receive most attention in the summary because they are the closest the research now comes to offering any evaluation of how the Partnership has performed.

This summary report is designed to initiate discussions which will help in focussing the remaining months of the research project. Those discussions will be further informed by the next report, the scope of which is indicated in the conclusions to this summary.

Notes:

There are two long reports, presenting the full survey results, and these may be downloaded free from the Internet at

<http://www.bartlett.ucl.ac.uk/research/planning/kx>

Many of the diagrams in this summary and in the main reports will be clearer in the electronic versions as those are in colour.

In many of the charts, responses are broken down by main ethnic groups, by length of residence and by housing tenure.

In the 'length of residence' breakdown, people who have lived here for more than 10 years are termed 'long', those here for 5-10 years are 'medium'. Shorter-term residents (up to 4 years) are excluded from the analysis in diagrams where the questions relate to changes over 'the last 4 years'.

In data from the survey of employers, the results reflect a weighting process designed to give accurate expression to characteristics of the whole set of employers in the area, with a correct weighting of small, medium and large firms. Details of this weighting process are given in the full report. Small firms have fewer than 25 workers, large firms 200 or more.

Thanks...

...for assistance in survey and analysis work from: Musa Ndengu, Helia Evans, Joseph Lungu, Joram Odus, Omar Karshe, Shahid Hassain, Olga Hoque, Altaf Hossain, Shamsul Khan, Apollo Arikod, Marijn Fraanje, Helena Rostedt, Wilfredo De Vera, Abdel Erraou. Without the skilled and committed work of this local team of interviewers, these surveys would have been much less rich in the picture they give of the area. Thanks also to the many hundreds of citizens and enterprise managers who took time and care to respond in interviews.

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2. Employment and job prospects

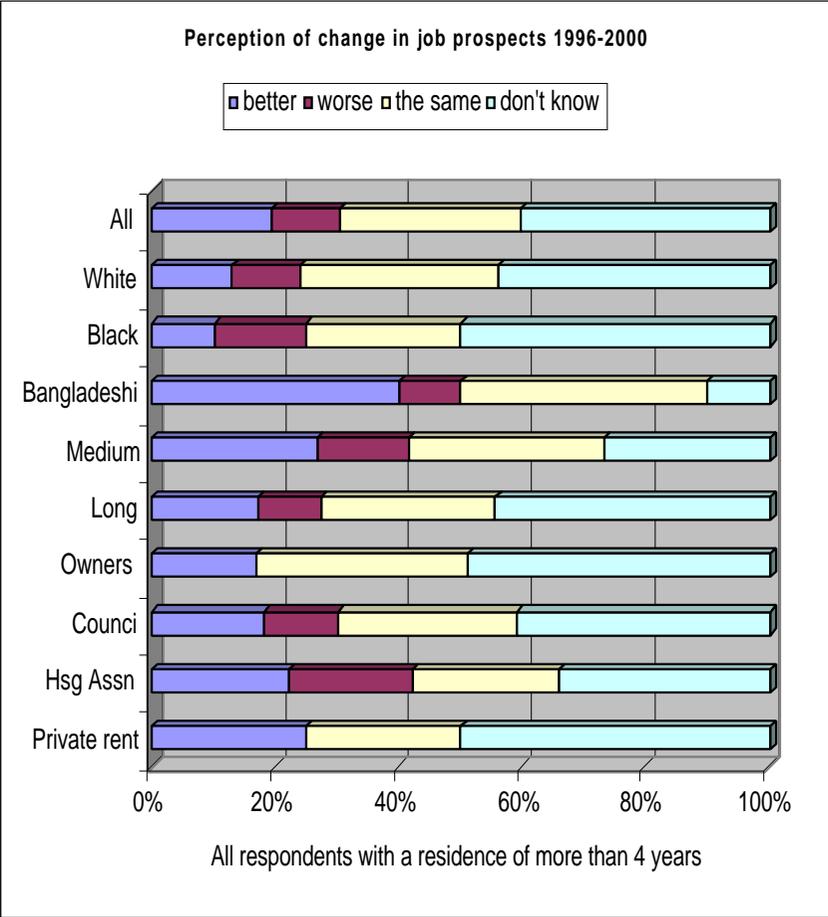
Unemployment is one key indicator of the level of poverty and deprivation - and hence quality of life - in an area. Residents were asked to state whether employment prospects had changed for the better, got worse or stayed the same in the last 4 years.

Overall, 19% considered that employment prospects had improved compared to 11% who claimed that they had got worse. A significant 29% stated that the situation had not changed, with an even greater percentage (40%) expressing no opinion at all. When these responses were analysed within each ethnic group, the Bangladeshi community were much more positive with 40% saying that employment prospects had improved compared to only 10% for the blacks and 13% for the whites.

About half of the survey population was employed at the time of the survey. White people were more likely to be working than black people, and Bangladeshi people least likely to be working. Men were slightly more likely to be employed than women, especially in the Bangladeshi community.

Employment was spread across many sectors, with a tendency for Bangladeshi people, and younger people generally, to be relatively concentrated in catering work.

The proportions working locally were highest among Bangladeshis, followed by whites, with black people most widely spread across London.



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Incomes

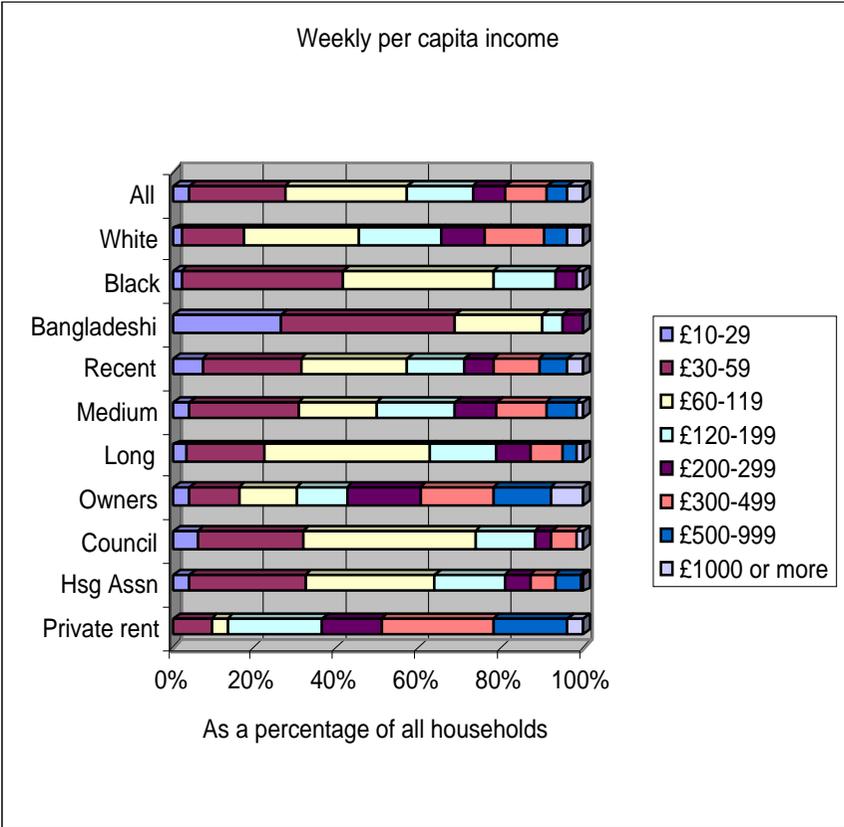
Taking all sources of gross income (earnings, benefits and pensions) huge differences are apparent between rich and poor and among ethnic groups.

Looking at the lower end, 17% of white households had a weekly per capita income of less than £60; this proportion rose to 41% among black households and was 68% among the Bangladeshi households. At the other end, 35% of white households had a weekly per capita income of over £200 compared to 5% for black and Bangladeshi households. Even among white people, however, there are substantial numbers of poor households.

Differences in per capita income were more pronounced with ethnicity than on other variables owing to the combination of low household incomes and comparatively large households among ethnic minority groups - particularly Bangladeshis.

Households were asked about their sources of income: and many had multiple incomes coming into the house – salaries, pensions and various kinds of benefits. Among the 297 households replying, 653 income sources were reported.

It is important to stress that two thirds of the mentions were of state benefits or pensions of one kind or another, while only a third of the mentions were of employment incomes or occupational pensions. The analysis does suggest that poverty in the area may be due as much to low benefit levels as to low earnings levels.

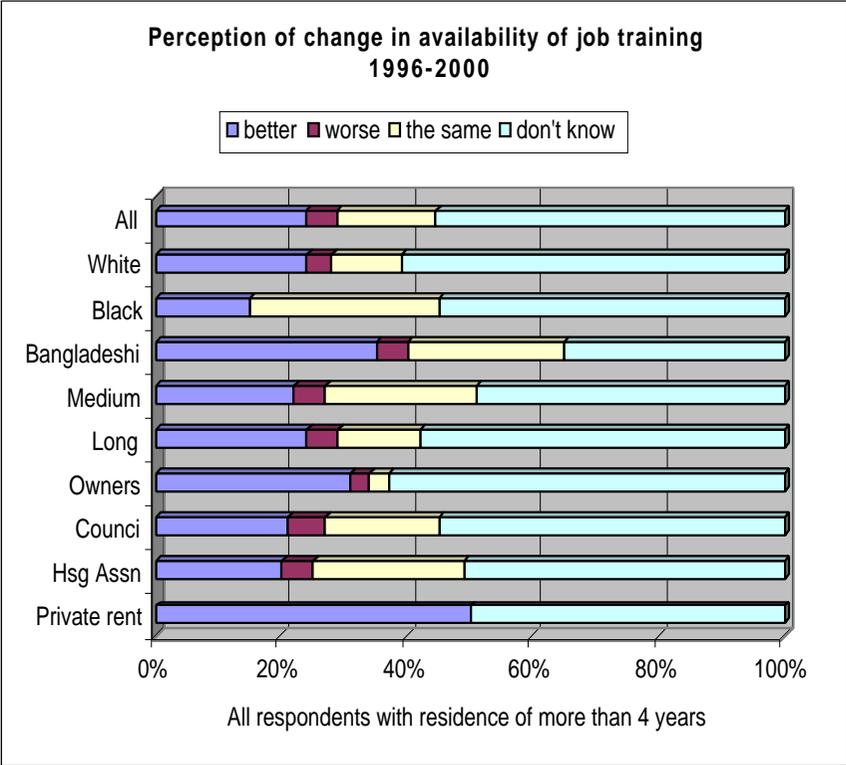


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3. Availability of job training

On the availability of job training, 24% of all respondents said that this had improved compared to only 5% who said it had got worse. While only 16% said that training had remained the same, 56% said they did not know, making this the one aspect on which the majority of respondents could not offer an opinion. This is so despite the Partnership's focus on training programmes through Tracks Towards Employment - a centre providing advice, guidance, basic skills and training support to help residents access further training, education and employment.

Although we are talking about very small numbers actually taking part in job training (17 in the whole sample), what was noticeable is that black and Bangladeshi respondents were all on 'other training schemes' outside the mainstream government training provisions such as New Deal etc. It is possible that these 'other training schemes' include KCP advice, guidance and job preparation training programmes which have been targeted at the most disadvantaged. To the extent that King's Cross training projects aim to complement, add value and close gaps in mainstream training provision in the area (Deborah McLean, KCP Community Forum, May 2001), it could be argued that the Partnership is making progress towards this objective. For example, over 80% of new entrants on the Vocational Training Project were reported to come from minority ethnic groups, as were over 50% of those progressing into employment (Philip Morris, End of Year 5 Key Indicators report, April 2001).



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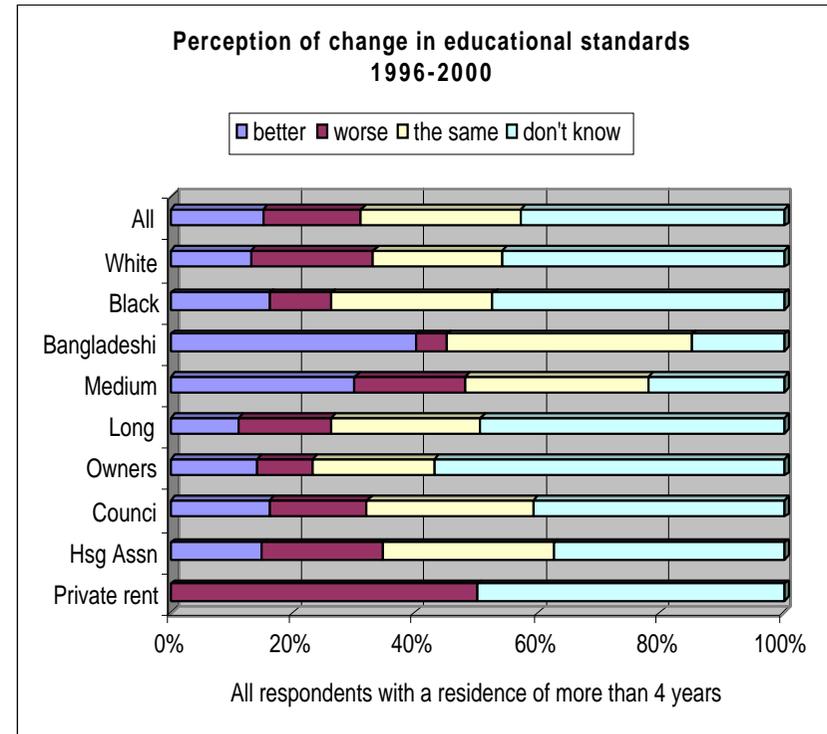
4. Standard of education available

Education is a big factor in shaping people's quality of life as it has a determining influence on life chances/opportunities. When respondents were asked whether the standard of education available had changed, 15% reported that things had changed for the better while 16% said it had changed for the worse with 26% claiming it had remained the same and an overwhelming 43% saying that they did not know.

As for jobs and training, there were again proportionately more households within the Bangladeshi community (40%) perceiving improvement compared to only 16% of black households and 13% of the white households.

Among those out of work, lack of educational qualifications had made it harder for them to find work - reported especially by black respondents - and problems with English (especially reading and writing) were seen as a barrier, especially by Bangladeshi people.

There were 228 children below 18 spread through over half of all households sampled in the area. Thirty-nine percent of households had children aged between 0-10 years and 22% had children in the 11-18 age group. The proportion of households with children was found to be considerably higher within the two ethnic minority groups compared to white households. There was also a tendency for households with children to be recent- or medium-term arrivals in the area (and to be living in council or housing association tenancy) as opposed to long-term residents (or in owner-occupied housing or private rent).



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5. Access to, and quality of, shopping

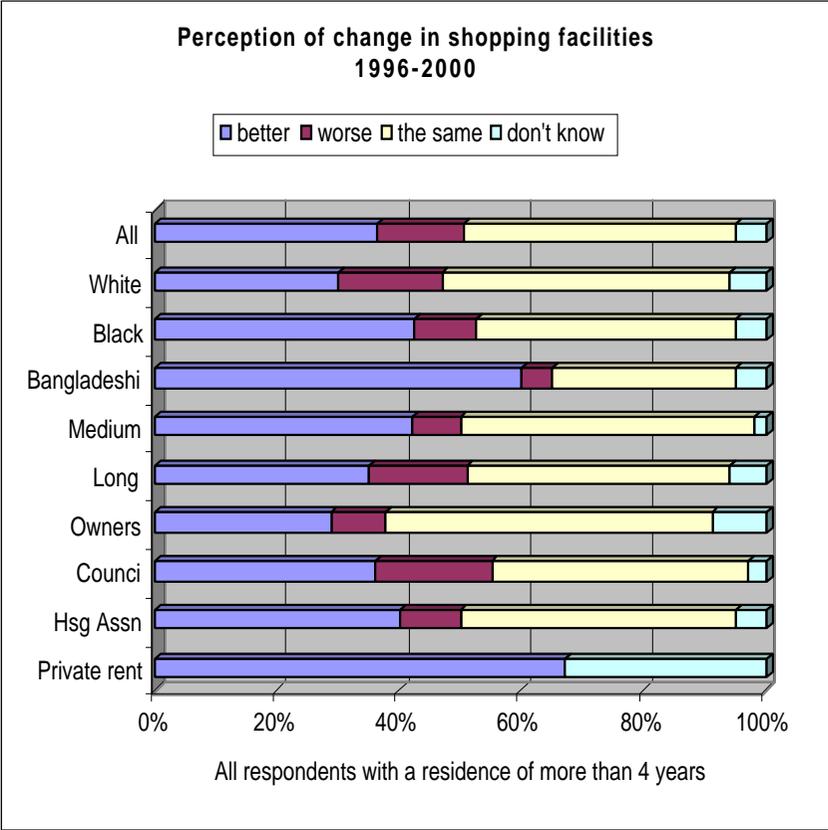
Households were also asked to give their opinions on the changes in access to, and quality of, shopping.

in contrast to the earlier three questions on employment, education and training in which many households remained without a clear view, most households had an opinion on shopping.

Although King's Cross still lacks any substantial stores (in size) and also any mid-range or up-market multiple traders compared to the adjoining areas (Upper Street, Camden Town, Brunswick or western Bloomsbury) a surprisingly high proportion of households thought that access to, and quality of, shopping had improved in the last four years.

36% of all households said that shopping had improved compared to only 14% who said it had got worse, but the largest proportion (44%) said it had remained the same and only 5% offered no opinion.

Yet again rather more (60%) Bangladeshi households thought that shopping access and quality had improved compared to black (42%) and white (30%) households.



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6. Quality of housing conditions

The improvement of housing is another important social objective in the ongoing regeneration programme in King's Cross.

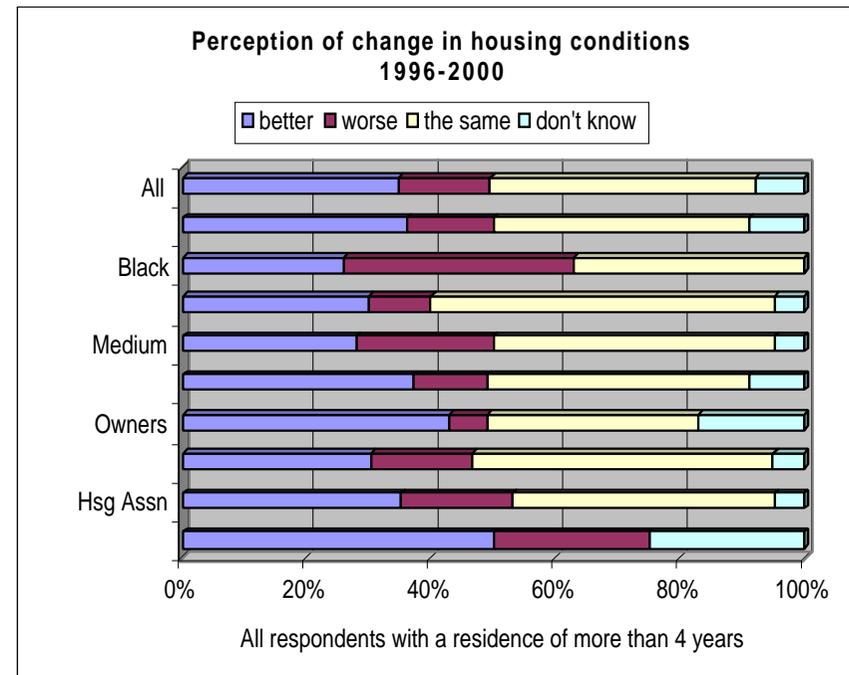
Among all households, 32% responded that the quality of housing conditions had improved, with only 16% considering they had worsened and another 41% claiming they had remained the same. The level of satisfaction with housing improvement was marginally highest among whites followed by Bangladeshi households with the black households being the least satisfied. In terms of length of residence, medium and long term residents were more satisfied than the recent arrivals.

Council tenants were least likely to consider that conditions had improved, followed by housing association tenants, owner-occupiers and private tenants.

Actual occupancy ratios (number of people divided by habitable rooms) were calculated to give an indication of the level of crowding. In the whole survey we found an average of 0.7 people per habitable room, the most common experience being in the range 0.50-0.99, i.e. between one and two rooms per person.

However, this masks a considerable concentration of overcrowding in certain groups. We found that while 46% of Bangladeshi households had occupancy ratios worse than 1.5 people per room, the proportion within the black households was 14% and a mere 2% among the white households. Of all households, 27% were found to have an occupancy of more than 1.5 persons per room - i.e. to be overcrowded.

The data we have gathered on households confirms the presence of a settled community in part of the housing stock alongside another part of the stock in which there is turnover and growth. Some serious overcrowding exists among both longer-term and medium-term residents, but those with plenty of space are overwhelmingly long-established white residents, and are either owner-occupiers or council tenants.



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7. Racial harmony

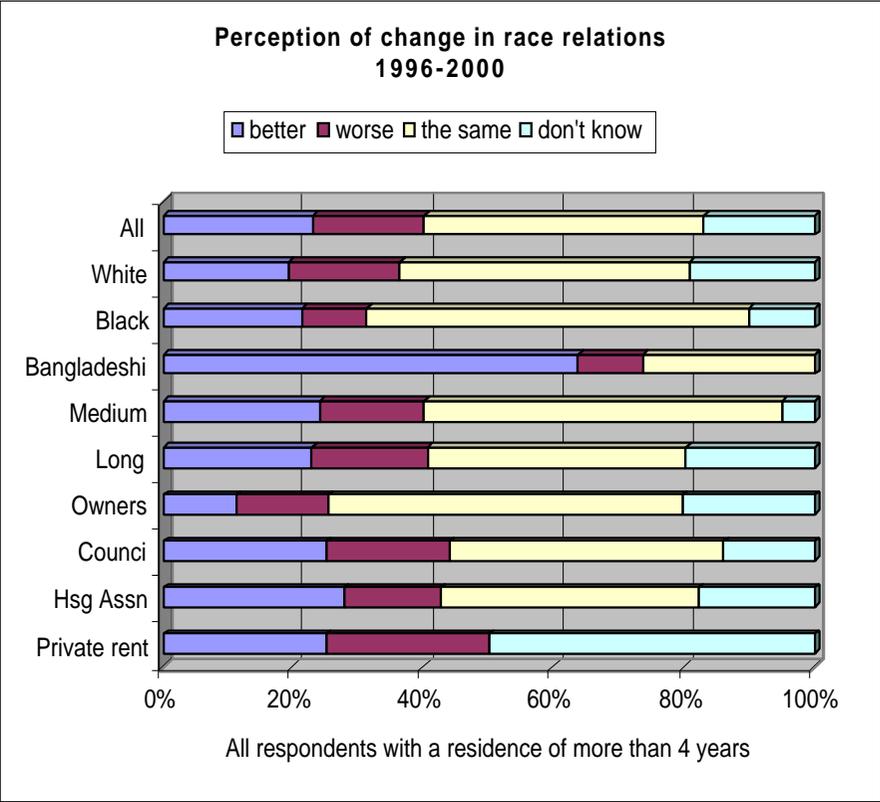
Respondents were asked whether they thought race relations had changed for the better, got worse or stayed the same over the last 4 years.

Among all households, more people (23%) said that ethnic relations had improved in the last 4 years than that they had worsened (17%).

A substantial 43% said that there had been no change and 17% that they didn't know.

While only 19% of white households perceived improvements in race relations, the proportion was marginally higher among blacks (21%) and was much higher among the Bangladeshis (63%).

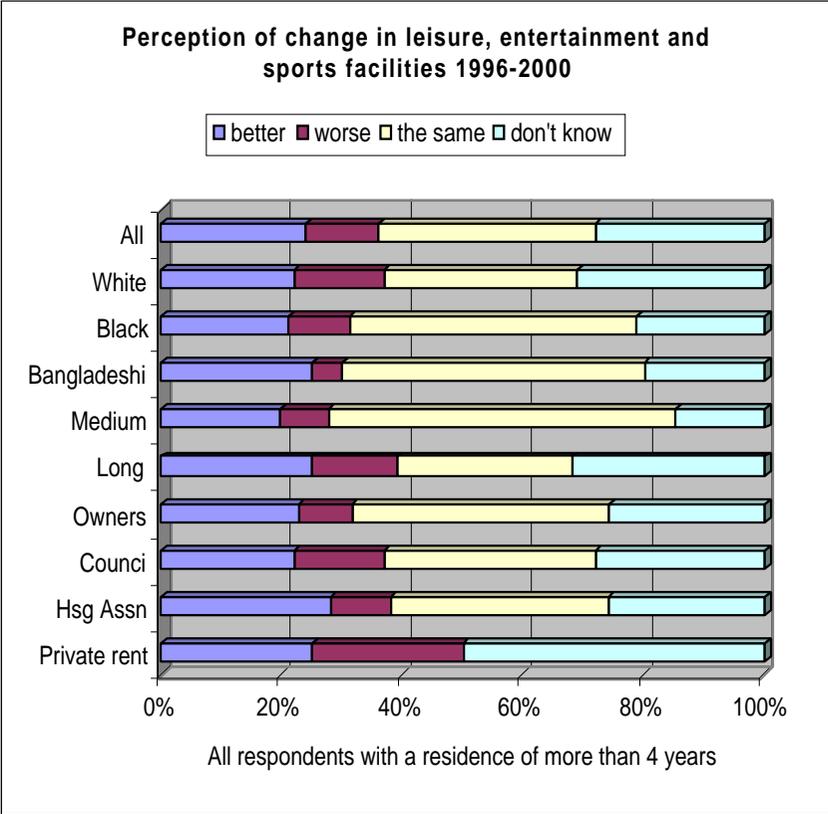
There was also a significant gender difference with more than twice as many male respondents as females reporting improvements in racial harmony.



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8. Leisure, entertainment and sports facilities

As to their perceptions of changes in leisure, entertainment and sports facilities in King's Cross, 24% of respondents said these had improved compared to 12% who said they had worsened. Again substantially more people (36%) reported no changes while 28% said they did not know.



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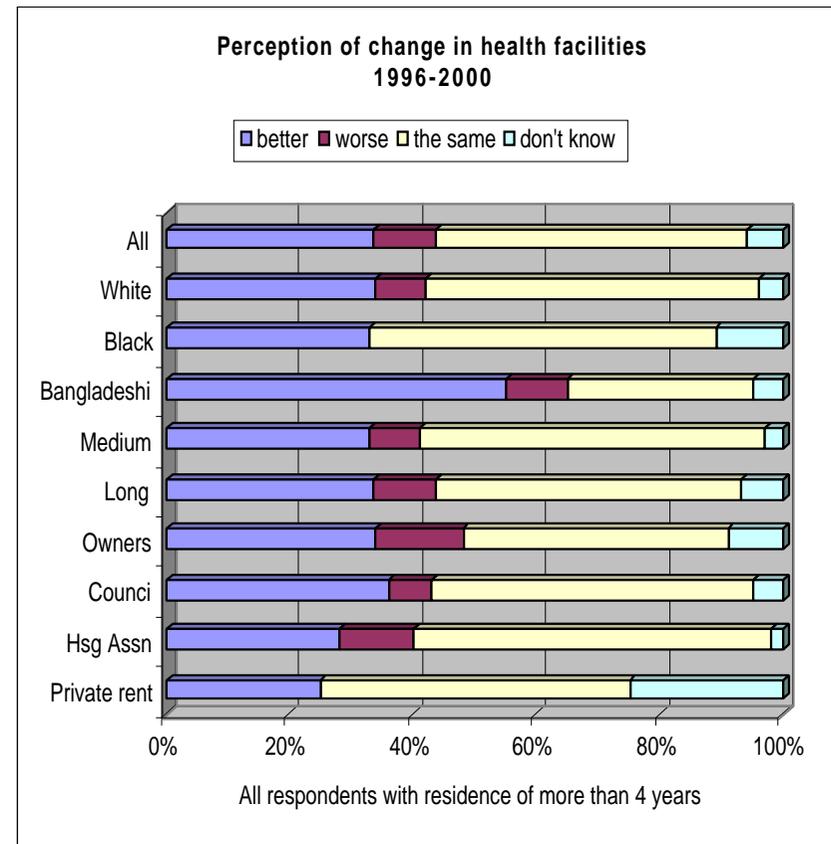
9. Health care facilities

Our survey showed that 34% thought health care facilities had improved and 10% thought that they had deteriorated, 51% thought they had remained the same and 6% offered no opinion.

A notably higher (55%) proportion of Bangladeshi households reported improvements compared to 34% of white and 33% of black respondents.

The percentage of healthy households was marginally higher among whites (79%) followed by blacks (74%) with the Bangladeshis at 70%. Long-term residents were more likely to report poor health than recent- or medium-term residents. However, among long-term residents are most of the frail elderly people. Poor health was prevalent among council tenants with 33% saying that household health was not good or was poor, followed by housing association tenants at 27%. By comparison, owner occupiers and those renting privately enjoyed better health with only 6% reporting their health as not good or poor.

Of all households, 29% contained a member with a long-term illness. Within the ethnic groups the proportion was 25% for the whites, 39% for the blacks and 35% for the Bangladeshis. In terms of length of residence, long-term households were twice as likely to have a person with a long-term illness as recent- or medium-term households. Again council tenants came out worst with 38% of households having a member with a long-term illness, followed by those in housing association units at 30%, owner occupiers at 20% and lastly private renters at a meagre 3%.

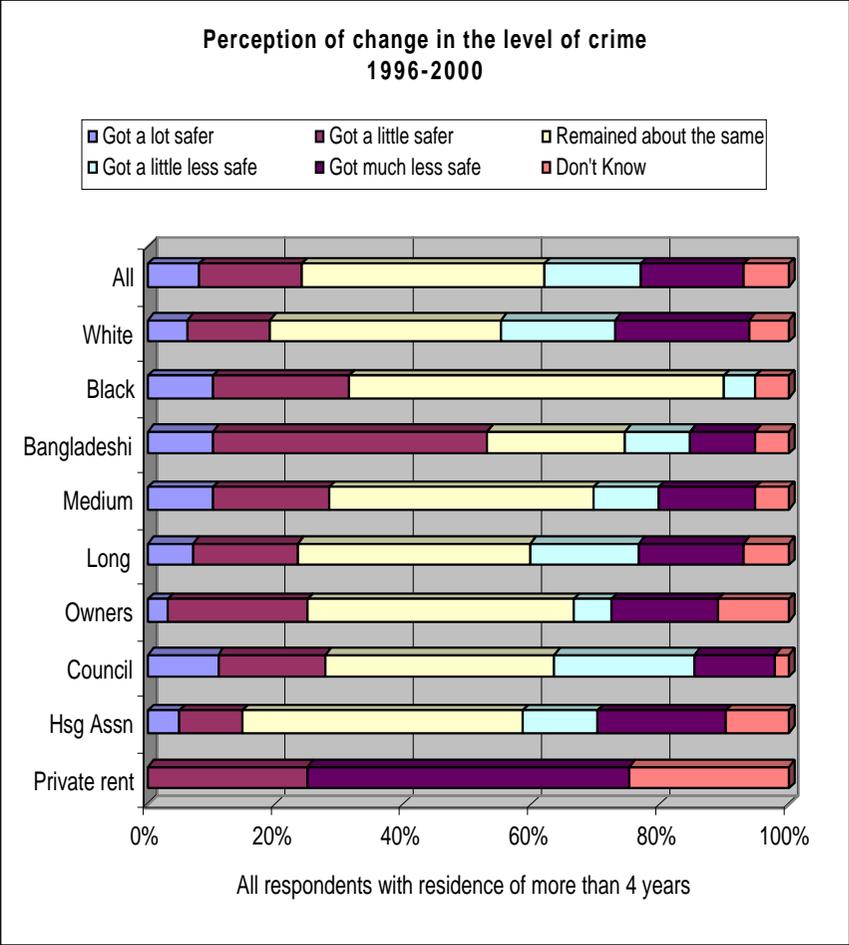


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10. Crime

Households were asked to look back over the last 4 years - spanning the period of regeneration activity in the area to date - and say to what extent they thought that the area had changed in the level of crime. Twenty-four percent said that it had got safer compared to 31% who thought the area had got less safe while 38% claimed that it has remained the same. A higher proportion of ethnic minority residents (32% black and 53% Bangladeshi) thought that the area had got safer than did white residents (19%). When the length of stay was taken into account, only 23% of long term residents thought that the area had got safer compared to 28% of medium term residents.

The picture which emerged was that long term residents were more negative about the area compared to medium term residents. Although reporting the highest feeling of insecurity at home, the proportion of people saying that the area had got safer was highest among council residents (27%) followed by owners and private renters (25%) and housing association tenants (15%). When analysed according to age group, the feeling that the area had got safer was highest in the 15-29 age group (48%), low in the 60+ (25%) and lower still in the 30-59 age group (19%). A slightly higher level of men (28%) reported improved safety compared to women (22%).



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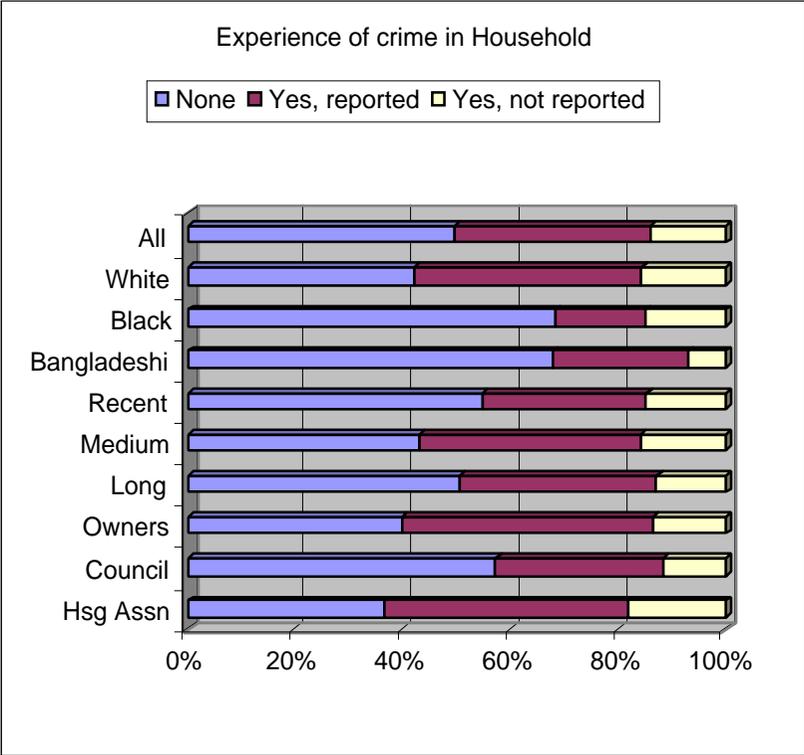
Experience of crime

In addition to soliciting respondents' feelings and behaviour on crime and safety, households were also asked about their actual experience as victims of crime.

It was important to examine the relationship between fear of crime and actual crime. After all, it is often argued that fear of crime is more of a problem than actual crime. While 51% of all households had had some experience of crime, 49% had no experience at all.

When disaggregated according to ethnicity, the experience of crime was higher among the white households (58%) and lower within the other two ethnic groups (32%). The high experience of crime among the whites might serve to explain the negative feelings discussed earlier.

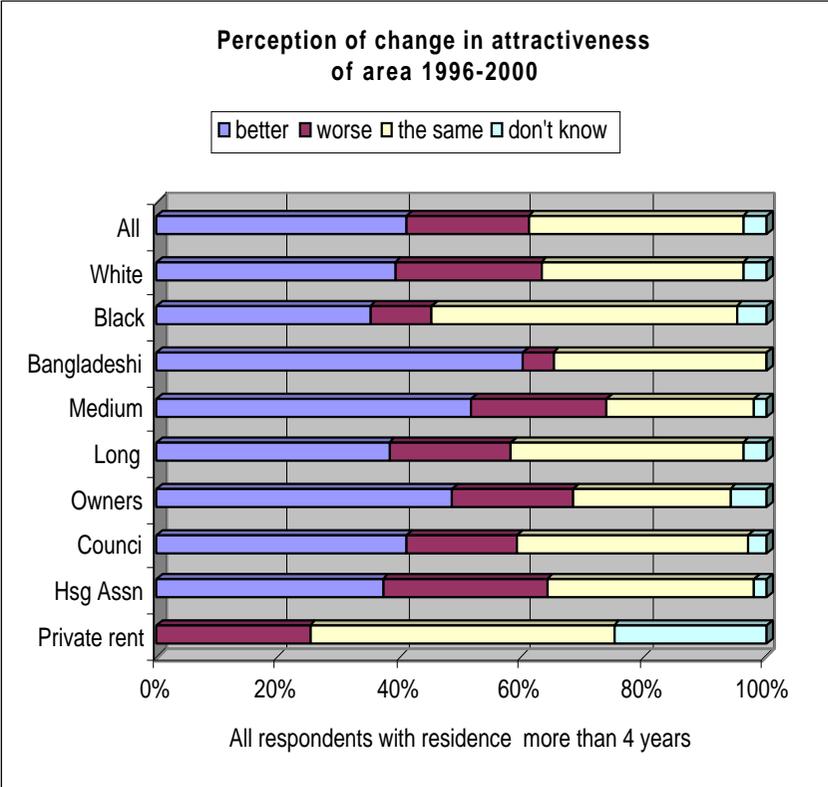
Was the crime level experienced by whites disproportionate to their population? To answer this question it was necessary to examine crime levels across the three main ethnicity's rather than within. It does appear that white households were slightly more strongly represented among those households experiencing crime: although forming 62% of all sampled households, they accounted for 71% of households experiencing crime.



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11. Attractiveness of the area

A question on the attractiveness of the area revealed that households had some strong views with 41% reporting that the area had improved compared to 20% who thought it had deteriorated and 35% considering that it had remained the same. Only 4% did not have an opinion.



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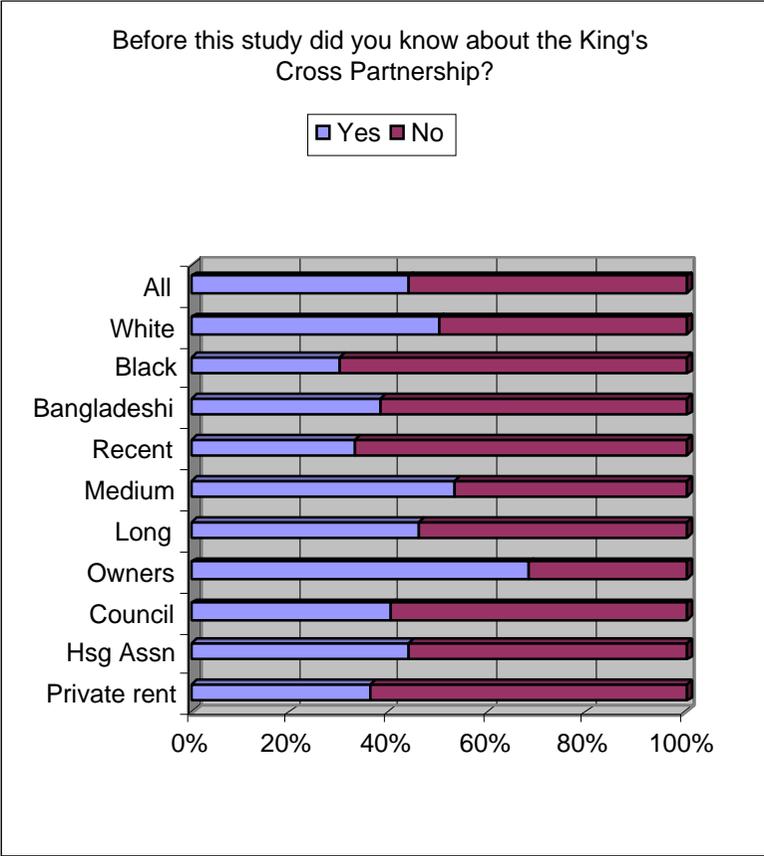
12. Households and the Partnership

More people were aware of the Kings Cross Partnership (than of the Single Regeneration Budget - the SRB) with 44% saying that they knew about the Partnership compared to 56% who did not.

Although black households were more likely to be aware of the SRB programme than the Bangladeshis, they were the least informed about the existence of the Partnership with only 30% saying they knew about the Partnership's existence compared to 38% of Bangladeshis. Knowledge about the Partnership (and of the SRB) was highest within the white community with 50% of households saying they knew about it. While knowledge about the Partnership was marginally higher for council (40%) and housing association tenants (44%) compared to private renters (36%), owner-occupiers at 68% were most likely to know about it.

Respondents were shown the Partnership newsletter and asked if they had seen or read it. Fifty percent had not seen it, while 16% had only seen it and 34% had read it. White households were most likely to have read the newsletter followed by black, and Bangladeshi households were least likely to have read it. Analysed by tenure, it was owner-occupier households who showed the highest interest in reading the newsletter, followed by housing association tenants, with the least interest coming from the private renters.

Most respondents were aware of Partnership activity to improve the general environment; this was followed by housing improvements, and support for small business. Partnership efforts at improving education came in at fourth place ahead of job creation which was in last place.



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13. Economic activity in the SRB area

The research team contacted all the large and medium sized public service, voluntary and private enterprises to be found in the area, plus a sample of the small ones, in 2000 and 2001. In total we estimate that about 1000 enterprises are active and the figures presented here are weighted to form an estimate for all of them.

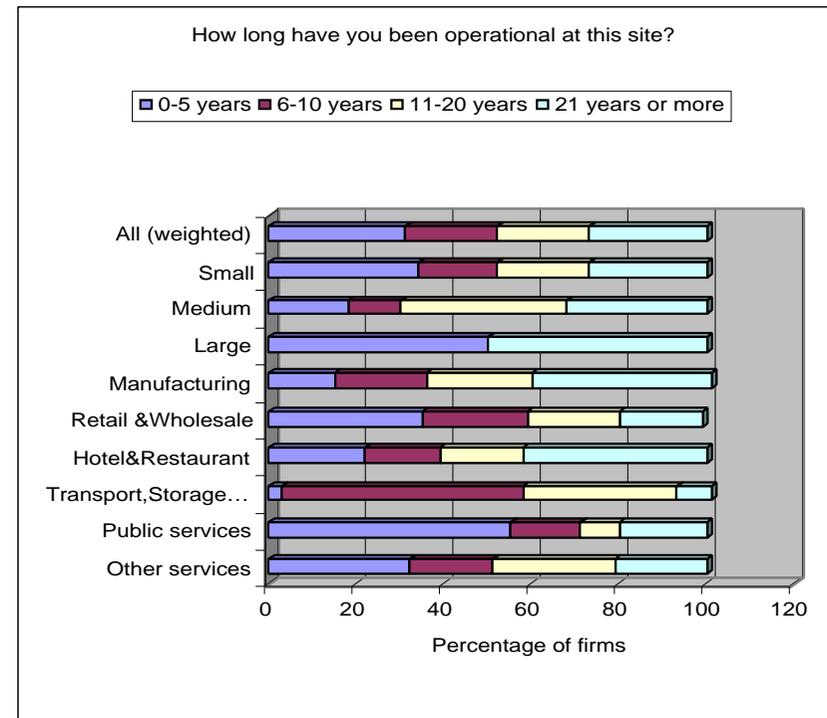
As with households, the businesses in the area are a mix of long-established and new ones: about a third are start-ups within the last 5 years while a quarter have operated here for more than 20 years.

The survey confirms the observation that King's Cross is remarkable for the lack of corporate and large businesses. Three quarters of all businesses were owned by their managers and sixty-five percent were either described as private or partnerships: three quarters of businesses in the retail and restaurant sector were of this type. Limited companies accounted for 16% of all businesses with manufacturing and transport and manufacturing proportions being considerably higher at 45% and 27% respectively. At 15%, there were nearly as many Not-For-Profit organisations (co-operatives, community businesses, registered charities and Trade Unions) as they were companies. While private businesses tended to be small, other types of establishments were mostly medium or large.

Who are the firms serving? Are firms prospering and expecting to grow?

Businesses in King's Cross have a broad client base - serving local, regional, national and international users. While 43% of all establishments estimated that their face-to-face sales/services to local people accounted for over 75% of trade, 12% of all establishments estimated that over 75% of their face-to-face trade was with regional, national and international customers. Other business (not face-to-face) ranges much more widely with manufacturers, wholesalers, some retailers and many services reporting their main client base abroad or spread across the UK.

Most businesses were optimistic about their ability to respond to changing customer levels - small firms more so than large ones, and with manufacturers least optimistic. This may reflect the experience of recent growth: most firms had increased their turnover in the last 4 years, the exceptions mainly being in manufacturing and some transport/storage fields. Turnover growth is expected by the great majority of firms: all the biggest ones, most of the medium ones and a majority of the small ones. Pessimism about turnover growth is to be found among some of the newer establishments.



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14 Business premises, rents and location

The great majority of firms occupy freeholds or have leases longer than 15 years. The rest of the businesses occupied their premises on shorter leases or licenses. The newer firms, and those in public and non-profit services were the most likely to be insecure in their premises.

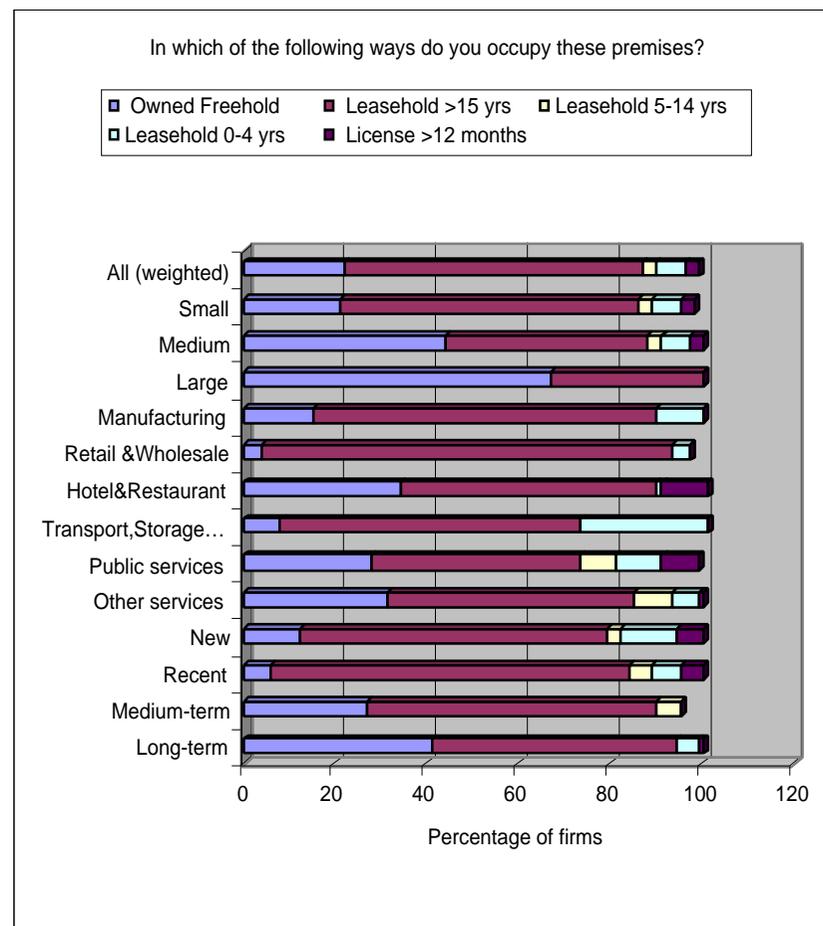
Rents for business space vary enormously: nearly half pay less than £100 per square metre per year, while nearly a fifth pay over £300. It seems to be anxiety about future rental growth which firms are troubled by, rather than short leases: half the firms considered that their capacity to cope with rent increases was not good.

Location factors - for and against King's Cross

The centrality of the area, transport networks, proximity to clients and low rents were strong determinants in business locational decisions. Favourable features of the location were stated as accessibility, intense pedestrian activity, the general reputation of the area and specific attractive features of the area or building.

But half the firms, especially smaller ones and non-profits, experience problems operating in the area. The burden of rents and rates are given greatest weight here, followed by staff recruitment and retention, problems of parking and loading and the costs of crime and crime prevention.

Firms were asked whether they expected to remain in the area. About a third expected to stay indefinitely, another third hoped to remain for the foreseeable future while the other third hoped or expected to move - usually because their tenancy would expire or their premises needs would change. Of those envisaging a move, about a third would stay in the area and a third look elsewhere in Inner London. Many said they would like help with moving, or with meeting rising rents.



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15. Jobs

At the time of this survey, only 17% of employees in King's Cross also lived locally, 29% travelled from the rest of inner London, 23% from outer London and 14% from outside London

Hotels, restaurants, and to a lesser extent retailing, were the strongest employers of local labour. Manufacturing was more likely to employ from the rest of inner London and transport, storage and communications from beyond outer London. The proportion employing local people was highest among private firms and the highest proportion employing from the rest of inner London was to be found among companies and not-for-profit organisations. Outer London residents were more likely to be employed within public bodies and in medium size and large firms.

Seventy four percent of all full time employees were white with 26% being from ethnic minority groups. Full time ethnic minority employees were concentrated in small privately owned firms particularly in the retail/wholesale and transport, storage and communications sectors.

Recruitment

Medium size firms were least likely to try to recruit locally; small and large firms do make efforts. At 58% hotels and restaurants were more likely than all other sectors to look for local labour. Not-for-profit organisations were more active than all other ownership types in their pursuit of local labour.

Of those firms that aim to recruit local people, only 18% claimed to have been very successful, another 45% had been fairly successful while 30 percent had not been successful at all. While similar proportions of large and small firms had intentions of recruiting local labour, the latter had been more successful than the former. By sector, hotels and restaurants had been very successful, manufacturing, transport, storage and communications and other services were fairly successful. Generally, it was privately owned firms who had been more successful at local recruitment with companies being the least successful.

Firms use formal and informal methods to recruit. Large firms make more use of formal media (and tend to seek people with very specific qualifications and skills) while small ones and some medium ones rely heavily on word of mouth. Recruitment problems (and unfilled vacancies) were reported most often by larger companies and non-profits. A total of 271 unfilled vacancies were reported.

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16. Business and regeneration

Two thirds of those interviewed knew of the King's Cross Partnership, the proportion highest among medium-sized firms and among companies and non-profits, rather than small firms.

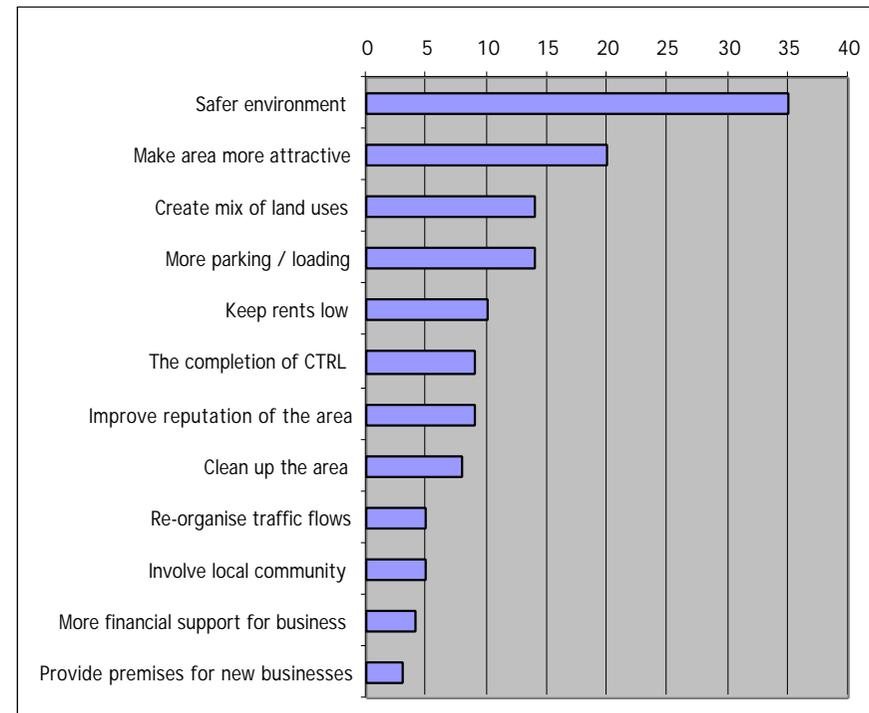
Only about 12% of firms had actually been involved in Partnership activities or projects. Eighty-seven percent had no involvement at all with only 1% saying that they had tried, but failed. Of those who had been involved it was mainly medium and large size firms, more likely to be in the public services, owned as not-for-profit or as public bodies. The firms least involved tended to be in the retail and wholesale, and transport, storage and communications sectors, and firms in private ownership.

Those who had participated reported a wide range of engagements: facade improvements, equipment and start-up grants, education and training and security projects. The range was widest among public services and for hotels. The main benefits reported elsewhere seem to have been mostly facade improvements.

Three quarters of firms expressed a willingness to take part in business forum activity in the area, and this proportion was above 60% in every single size-band, ownership type and category.

Asked about their priorities for business development, firms expressed the priorities summarised in this chart.

Twenty percent of all businesses interviewed said that the Partnership had done well (very well - 2%; fairly well – 18%) in addressing identified business development priorities as against forty nine percent who said otherwise. Thirty one percent of firms however failed to give a verdict, preferring to say they didn't know. Medium size firms, those in hotels and restaurants and public service sectors, and in not-for-profit ownership were most likely to be positive about the effectiveness of the Partnership's activities. Firms within manufacturing, retail and wholesale and other services sectors, were more likely to be negative about the Partnership's work in addressing identified business development priorities.



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Conclusions and future strategies

What do we make of all this? The general picture of perceived changes among residents in King's Cross was that, although most people thought that the situation had not changed in the last 4 years, comparatively more people reported improvements than deterioration.

No local social programme, however well designed and rigorously implemented will be able to eliminate unemployment, poverty, drug-related crime etc. On balance however, it would seem that King's Cross is making limited progress towards achieving its strategic objectives in the area. Household opinion and experience seems to bear this out except perhaps, among some sub-groups.

An attempt to link this progress to KCP's activity runs up against multiple policies all acting on the area. For example, in addition to KCP's attempts to reduce unemployment, there are other local and national programmes directed towards the same goal. Unemployment rates are also influenced by economic trends (which have improved employment steadily through this period).

Likewise, Partnership efforts at improving school performances operate alongside other similarly designed local and national programmes. Schools' achievements are also affected by other factors such as the amount of family support, length of time pupils have been in school, level of competence in English, and incidence of special educational needs. For these reasons, it is not possible to isolate the effects of Partnership activity from all the others, because other factors/activities will always impinge on the outcomes.

Social change is a lengthy and slow process. It is difficult to think that these changes will be dramatic after only 4 years between the beginning of the Partnership and this first survey. Re-survey would reveal some further changes, but some of the impacts may not even be evident until after the life of the Partnership is over.

Issues and priorities for the future

The institutional and policy contexts within which the KCP was created six years ago have changed. In July 2000, The London Development Agency (LDA) and the Greater London Authority (GLA) replaced GoL as a vehicle for regeneration funding in London. This is likely to have implications for the management and funding of local regeneration activities.

King's Cross seems likely to be a major growth centre in the Mayor's Spatial Development Strategy (SDS). The SDS seeks to ensure that the investments of hundreds of millions of pounds in the area will not threaten the sustainability and balance of the community and the economy.

With its seven year life span almost complete, the KCP is now trying to think about the future of King's Cross at the end of its seven-year funding programme and also in the context of the new institutional framework and London wide strategies now coming from the GLA/LDA. Discussions about the future should, in our view, include answers to the following key questions:

- how do you secure and sustain gains for the local community in the face of intensifying regional and local pressures (housing, employment etc)? Neither residents nor the very distinctive small and medium firms making up the local economy are in a strong position to sustain themselves.
- How do you help the under-employed into better jobs and help those excluded (either due to poor skills, ill health, discrimination, caring responsibilities or other reasons) into the labour market?
- What can be done to tackle the poverty affecting those outside the labour market – retired people and those dependent on benefits in the long term?
- How do you protect existing small and medium enterprises, non-profits and community facilities from property market pressures, enabling them both to contribute to and benefit from the transformation of the area? This will involve continuing work on low-profile interventions on rents and premises and on the management

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of parking and loading - just as much as high-profile activity like marketing and policing.

- What organisational forms might protect the interests of relatively weak individuals and organisations as the pace of gentrification in housing (and towards corporate business) accelerates?
- In the short term, this involves area management in the coming decade of massive construction works, most of it happening after the SRB ends.
- For the longer term, it involves strengthening the citizens' organisations in the area and the mechanisms through which they could operate as genuine 'partners' in a development process currently led by large corporate bodies.
- The area is presently home to a rich diversity of 'social enterprises', non-profits and representational bodies. This sector's potentiality within a diverse future economy has not been explicitly considered and it is likely to be especially vulnerable to rising rents.

These questions will be among those considered further in our next report, now in preparation, which will focus on placing the survey results in context - seeing how change at King's Cross compares with wider areas and with what might have been expected to happen in the absence of the Partnership in the period up to 2000/01.

That next report, when released by the Partnership, will - like the reports to date - be available on the web site at

<http://www.bartlett.ucl.ac.uk/research/planning/kx>

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