

Report



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Walworth Road Vitality Viability and Vulnerability Study London Borough of Southwark

December 2014

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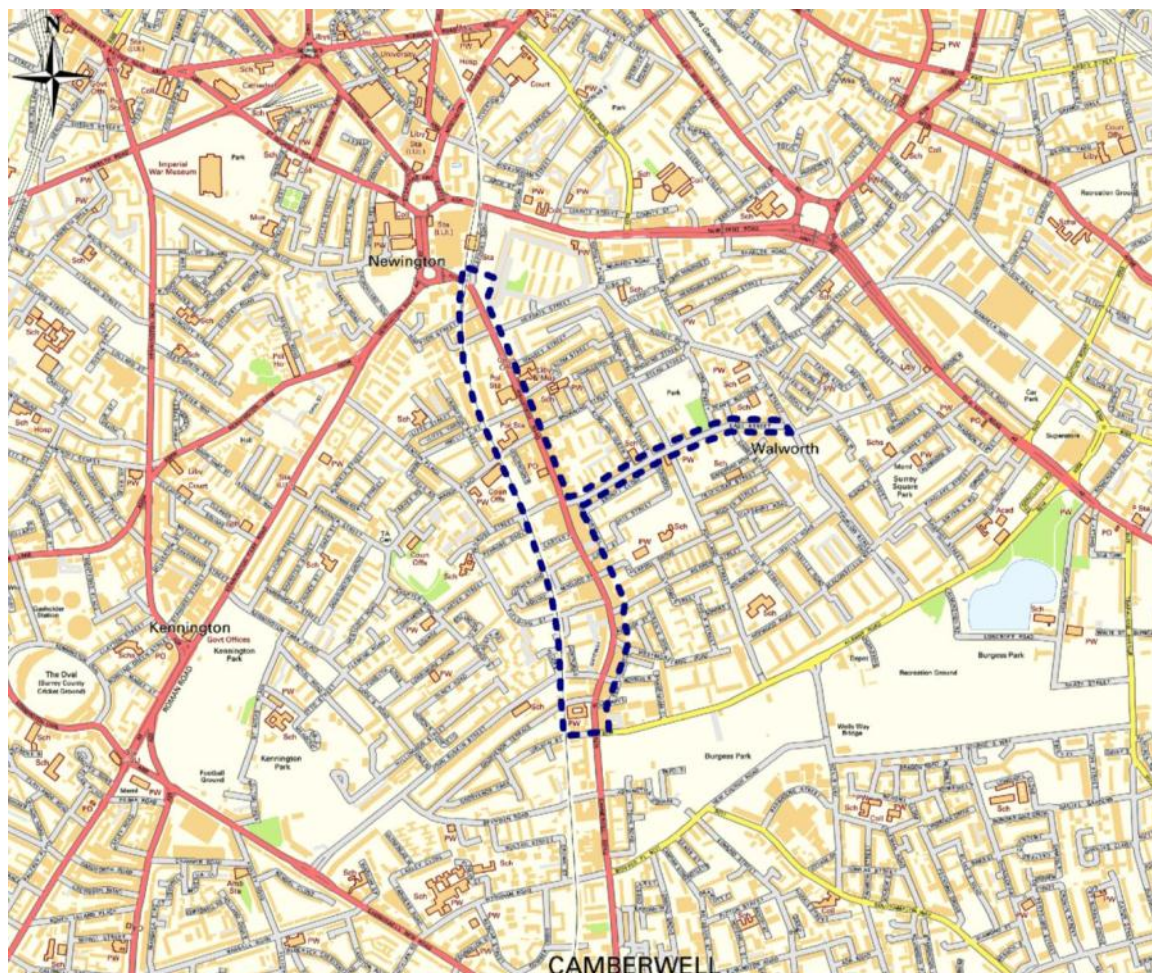
Core Project Team
GVA
EAST

1. Introduction

- 1.1 GVA has been commissioned along with EAST to prepare a study which reviews the long term potential of the Walworth Road as a location for retail, leisure and community activity in light of significant changes to the economic, retail and development context within which it operates. Supporting advice relating to transport and movement has been provided by Alan Baxter Associates and a business survey has been undertaken by NEMS.
- 1.2 The purpose of the study is to prepare a comprehensive baseline understanding of the Walworth Road, how it operates and is used by the communities that live close to it, how it is changing and the potential impacts and influences future development may have.
- 1.3 The study is very much the start of a process for the Walworth Road, bringing together the wide range of information that has been prepared relating to it and the wider area it lies within to understand what its future may be. An initial set of headline priorities and interventions have been identified to guide further research, intervention and investment in the future.

The Study Area

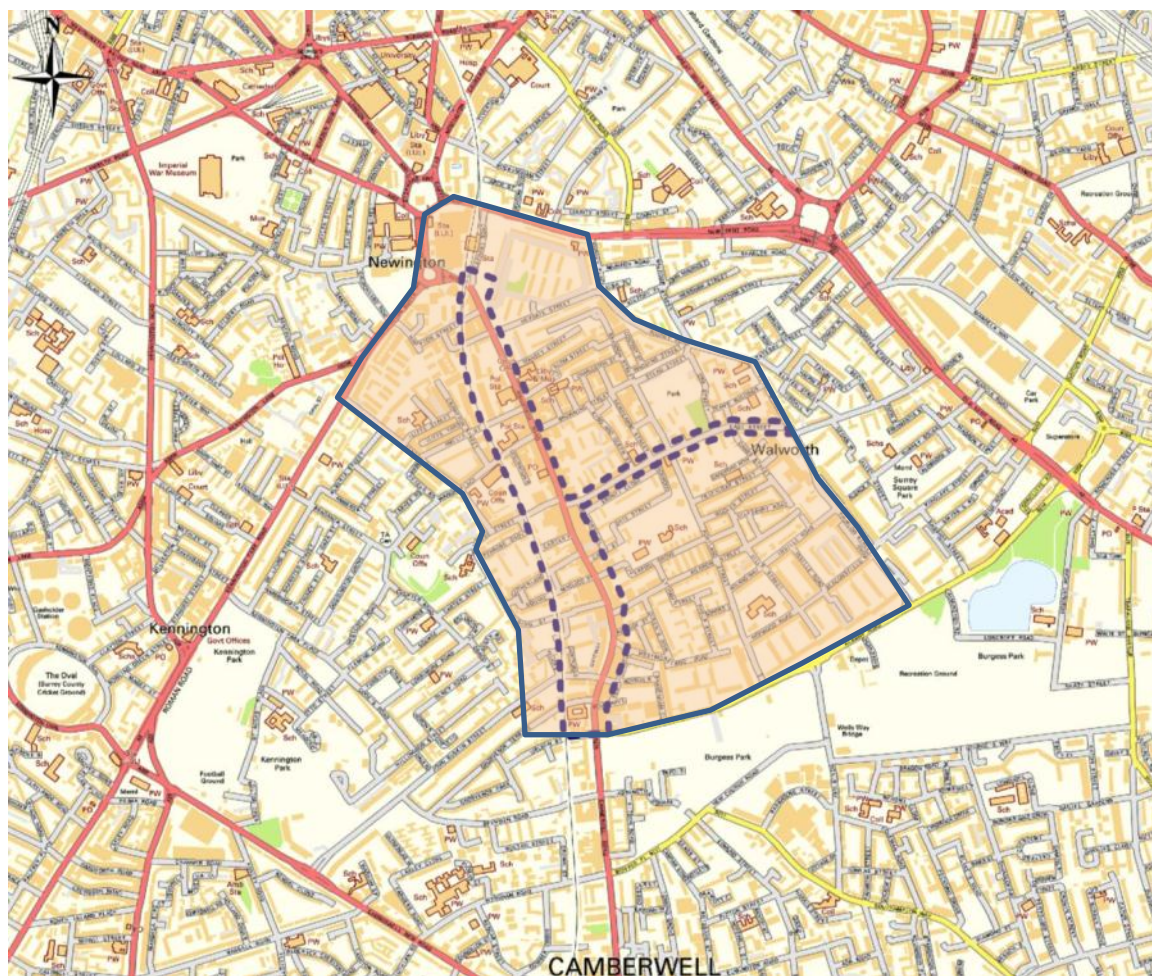
- 1.4 The project brief identified the core study area for the work as the Walworth Road frontage itself from the rail line in the north to its junction with Albany Road in the south, extending along East Street as far as Thurlow Street. The area is shown on the map overleaf.



Core Study Area

- 1.5 The initial research undertaken by the project team identified that whilst the core focus of the study should be within this identified area, the success of the Walworth Road would be influenced by a much larger zone. The Walworth Road is intrinsically linked to the surrounding communities; therefore how this relationship is managed and developed in the future will be as important as investment along the Road itself.
- 1.6 To reflect this important relationship the study considers a much larger area than originally identified in order to ensure interventions are joined up and improve not only the Walworth Road and East Street themselves but also the surrounding communities ability to access and use its amenities and services.

Wider Area of Influence



- 1.7 This extended area is also complemented by a wider understanding of the links and connections the area has to south London more broadly, including south towards Camberwell, west towards Oval, east towards the Old Kent Road and north towards the South Bank.

Approach and Audiences

- 1.8 The study has utilised a number of approaches in order to provide an understanding of the Walworth Road. In the first instance a desktop review of the wide range of existing information was undertaken across all domains. This included planning policy and applications, development masterplans, research and academic studies, and investment and market data.
- 1.9 Having established a baseline understanding the team have undertaken a number of walking and observational tours of the study area at various times of the day and on different days of the week. These have included 'guided' (with Council officers and local

stakeholder groups) and 'unguided' walks by individual members of the project team. The key focus of these has been to observe levels of activity across the study area, identify key assets and attractors, understand the impact of road traffic and 'test' the ease of walking routes and access to/from the Walworth Road.

- 1.10 To better understand how the Walworth Road performs for retailers a structured telephone business survey was completed by NEMS Market Research. This involved contacting 250 identified businesses within the study area, with 100 businesses participating in the full survey.
- 1.11 To supplement the understanding provided by the business survey we have engaged directly with a range of local stakeholders through direct meetings, a multi-stakeholder workshop, telephone discussions and 'on-site' interviews and 'user journey' walks. Alongside individual businesses engagement has brought forward the views of a number of stakeholders including:
- Southwark Council – including planning, regeneration, economic development, public realm, transport and public health;
 - Elephant & Walworth Neighbourhood Forum;
 - The Walworth Society;
 - Latin Elephant;
 - Business Extra;
 - Southwark Association of Street Traders;
 - The Creation Trust;
 - Network Rail;
 - Lend Lease;
 - Delancey; and
 - Notting Hill Housing.
- 1.12 Rather than provide a compendium of outputs from each research technique this report integrates the key messages from each to provide a single assessment of the Walworth Road. Relevant data and outputs from each research element are included as appendices to this report as appropriate.
- 1.13 This approach has enabled the project to understand the strengths and weaknesses of the Walworth Road from a number of perspectives, informing and supplementing our own

analysis of the key issues. By placing this alongside the confirmed (changing) context for the Walworth Road and understanding their implications we have put together a forward looking strategy which also responds to the character and needs of the Walworth Road community today.

- 1.14 The purpose of the Study is to act as a coordinator and guide for all stakeholders along the Walworth Road in their future investment and intervention decisions. It provides a coordinated framework for the Council itself to join up action across divisions whilst also identifying where there are shared interests and opportunities with other key stakeholders.
- 1.15 This study is not intended to be a finishing point; indeed its production marks the start of a journey that should place the Walworth Road at the heart of future actions within this area. It will be the job of all partners, their strategies and policies and also their investment decisions to translate the initial ideas in this report into reality. Specifically, this report is intended to provide a baseline understanding of the Walworth Road area to act as part of the evidence base for local planning policy.

2. The Walworth Road Context

- 2.1 Walworth Road is a classic South London High Street located immediately south of Elephant and Castle within the rapidly changing London Borough of Southwark. It lies within the Elephant and Castle Opportunity Area, serving as a local retail centre for the adjacent mass social housing estates and broader catchment area of affluent Denmark Hill to the South and growing communities in Oval and Kennington to the West.
- 2.2 The Heygate and Aylesbury Estates have historically provided a high-density catchment with lower spending power; however the area is currently experiencing a wave of regeneration which will add to the local population. A combination of growing working and residential populations to the North at Elephant and Castle and Kennington combined with extensive estate renewal programmes offer opportunities and pressure for change along the Walworth Road.
- 2.3 Walworth Road fulfils a multitude of functions owing to its strategic location in a dynamic area. Whilst part of the Major Town Centre designation for the wider Elephant and Castle/Walworth Road area the Walworth Road primarily functions as a district centre which satisfies the needs of the local residential community, complementing the concentration of primary shopping frontages at Elephant and Castle. This retail function is secured by the designation of the street as a 'protected retail frontage' in the London Borough of Southwark Core Strategy. However it also acts as an important North-South corridor between residential areas to the South and the growth node stimulated by the designation of Elephant and Castle as an 'Opportunity Area' in the London Plan (2011).
- 2.4 The dramatic scale of regeneration in areas directly north of and adjacent to the Walworth Road corridor will have a large-scale impact upon the local housing and commercial markets; a more affluent and mixed-income community will emerge. New patterns of footfall and spending shall be generated by new drivers such as the remodelled Heygate and Aylesbury Estates and an expanded centre at Elephant and Castle, thereby creating new opportunities for Walworth Road's future role as a local retail, leisure and amenity centre.

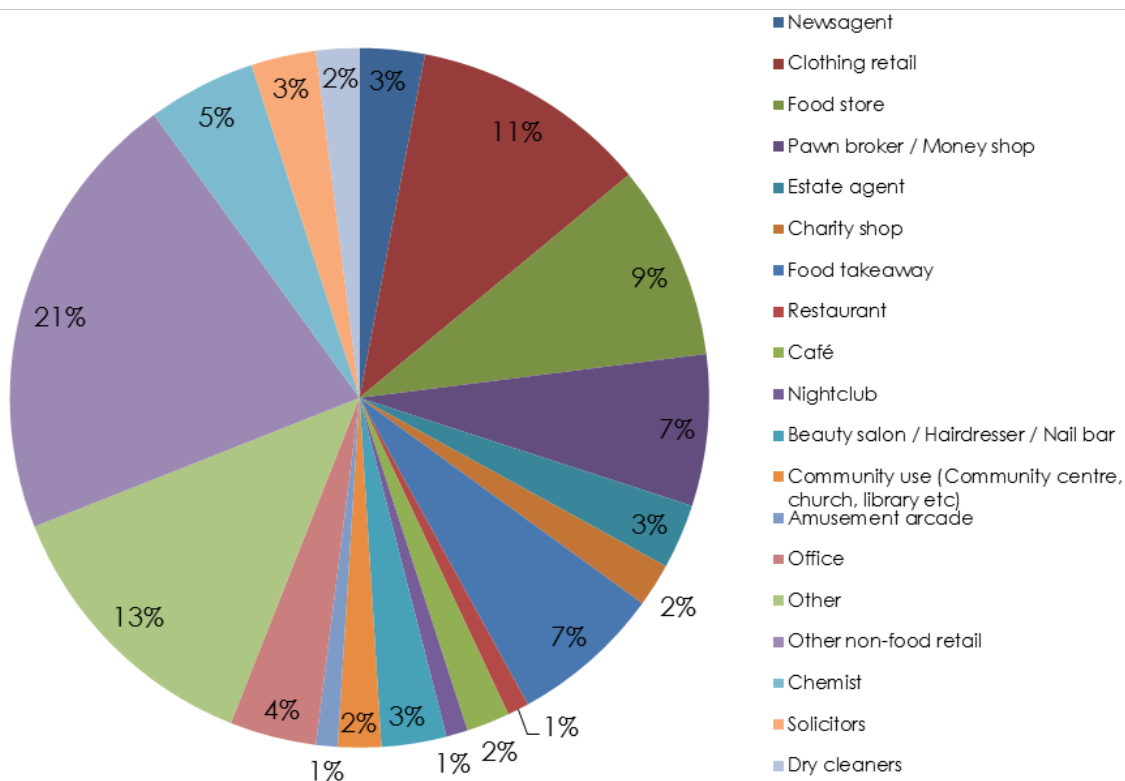
Walworth Road Today

- 2.5 The current and future retail, employment, community and transport functions of Walworth Road are closely tied with the developments in the catchment area, in particular the large social housing regeneration projects at the Heygate and Aylesbury Estates.

However, it provides a key shopping and community asset for residents of a number of smaller estates which surround it such as the Pullens and Gateway Estates, whilst these catchments are somewhat over-shadowed by the scale of change elsewhere, the Walworth Road is still of critical importance to their future.

2.6 As we discuss later the retail role of Walworth Road is particularly likely to be subject to major change as the whole area itself undergoes substantial redevelopment over the next ten years. In particular new and improved retail provision at the Elephant and Castle shopping centre and within the Heygate itself providing a new 'draw' for local catchments. It is therefore vital that the unique offer of the Walworth Road is retained and allowed to evolve within the context of the area's designation as a 'Major Town Centre' in the Local Plan.

2.7 The business survey carried out to support the development of this Study highlighted the diverse range of activities within the Study Area. Based on a sample size of 100 businesses the survey underlined the Walworth Road's principal role as a retail location, particularly for non-food goods where a fifth of surveyed businesses reported this as their main activity. Taken with specific clothing retail the comparison goods nature of the Road is clear.



2.8 'Other activities' were also strongly represented in the survey, predominantly made up of betting shops and 'other services'. Whilst individually less dominant the 'service' and

'community' role the Road plays is also well defined, ranging from community facilities themselves through to personal service activities such as beauty salons.

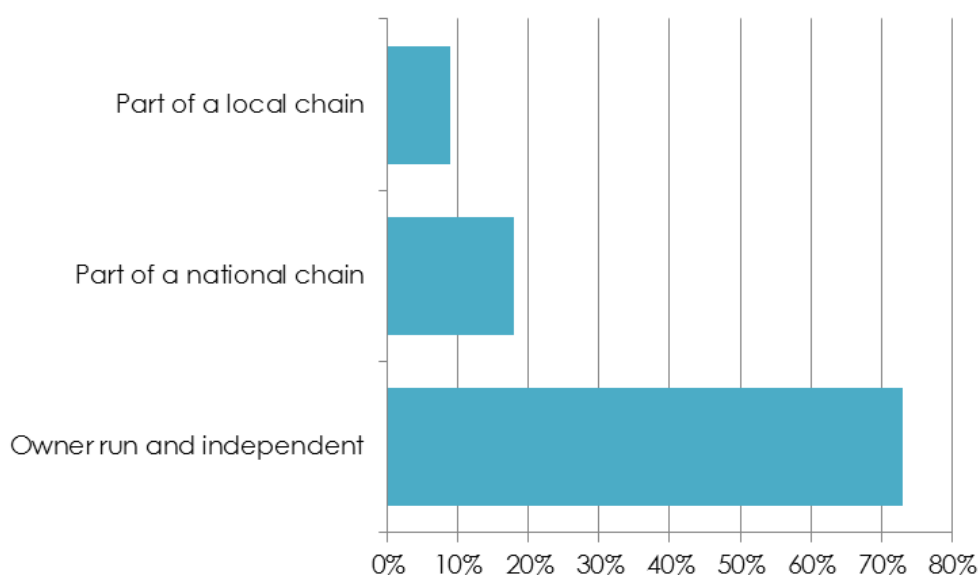
- 2.9 It is this combination of uses that retain the vitality of the Walworth Road and its relevance to the local area.

Retail role

- 2.10 Walworth Road is principally characterised by a diverse locally oriented retail offer which is dominated by a high concentration of smaller shop units. Units with larger floorspace are located towards the centre of the Walworth Road, with a cluster of key footfall drivers in the form of larger multiple outlets such as M&S and Morrisons. The northern section of Walworth Road is in this respect underserved by footfall drivers and larger local retail and service units.

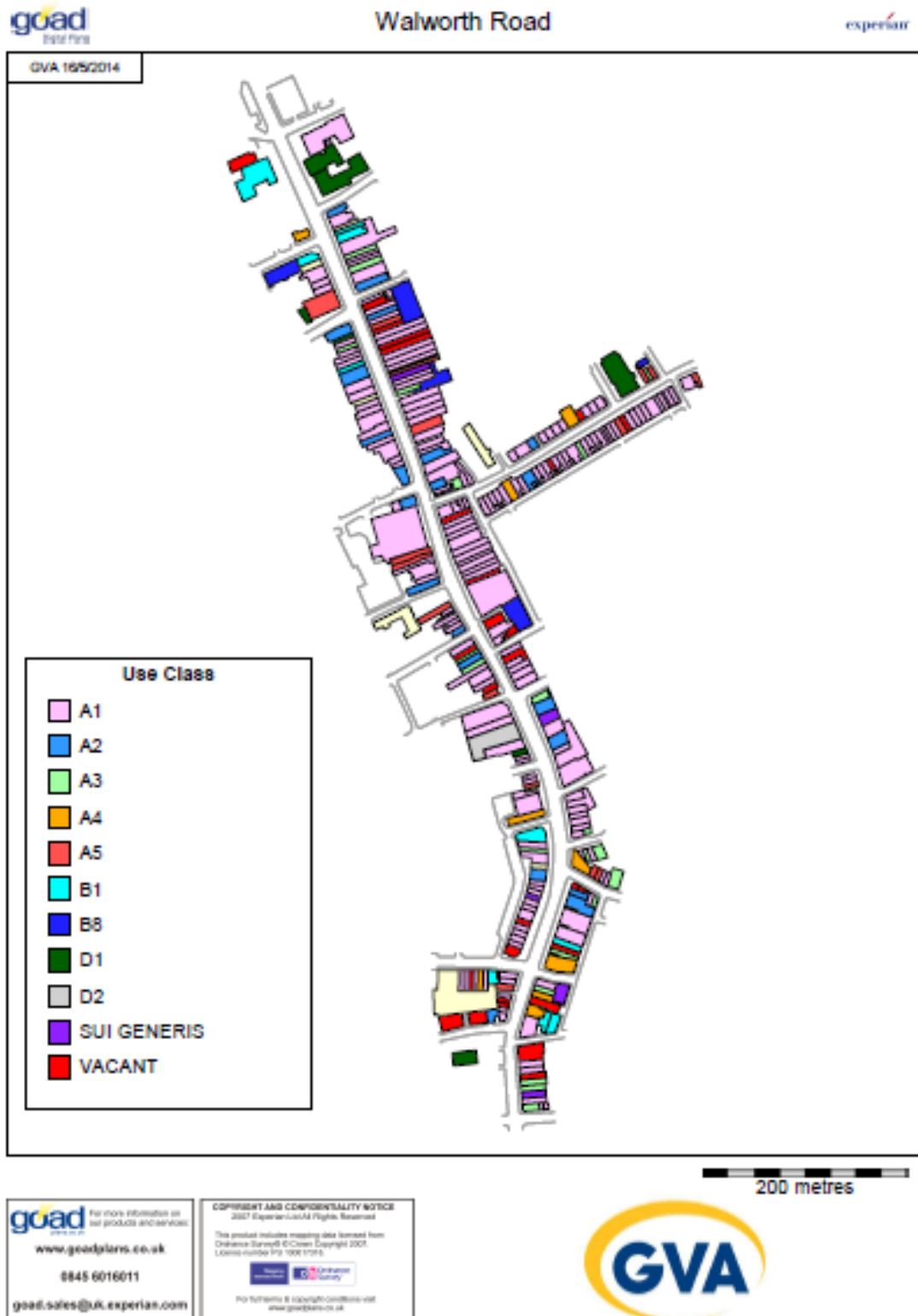
- 2.11 Convenience retail is provided by smaller scale independent businesses which range from local convenience shopping to specialist ethnic food retailers. Niche units with smaller footprints are located on Elephant Road under the railway arches at the top end of Walworth Road, providing unique premises for retail and service providers. This concentration of smaller local serving stores is complimented by the presence of East Street Market which is open six days a week, closing on Mondays, when the Street is open to road traffic.

- 2.12 The business survey results underline the importance of independent retail to the Walworth Road offer.



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- 2.13 Almost three quarters of the businesses who responded to the business survey considered themselves to be owner operated and independent of a larger chain, with a further 9% of businesses part of a locally operated chain of stores.
- 2.14 Only 18% of businesses surveyed were part of a national chain of stores. In part this reflects the nature of the retail units available within the Walworth Road which, as discussed below, do not offer suitable accommodation for larger retail activity. It also suggests that, as Elephant and Castle Shopping Centre is redeveloped there is an opportunity to complement the core chain and 'high street' offer it is likely to make.
- 2.15 A prime strength of Walworth Road as a retailing centre is its independent and specialist food retail offer, as demonstrated by the 55% of survey respondents who visit Walworth Road primarily for 'shopping in stores' as opposed to multiple chain outlets and supermarkets (ROI, 2014). This offer has a number of local strengths but also enables the Walworth Road to draw shoppers from a much larger catchment, with the ROI study identifying a number of regular shoppers who come specifically to the Walworth Road from outside the borough.
- 2.16 Whilst the Walworth Road is dominated by smaller floorspace premises, its retail offer complements the Elephant and Castle Major Town Centre style offer by providing a greater variety of local goods and services for the equally diverse local population.
- 2.17 The commercial landscape around the Walworth Road/John Ruskin Street junction is defined by a cluster of retail and service businesses geared towards the South East Asian community, which complements the cluster of services and convenience goods serving the local Latin American community at the Elephant and Castle Shopping Centre and Elephant Road. The cultural diversity of local goods and services provision is reinforced further by the African-Caribbean produce available at East Street Market.
- 2.18 The direct linkage to local demand is reflected in the business survey responses, with 35% of respondents identifying their core market as the streets immediately surrounding the Walworth Road. 22% of businesses identified their market reach as covering the whole of Southwark, with 16% trading with customers at a London-wide level.
- 2.19 The dominance of smaller commercial units reduces the ability of the area to attract new and underrepresented uses. The strength of independent food retailing is an asset, however a broader offer of mainstream multiple retailers would provide an extra anchor tenant for the street. The larger units required to accommodate such footfall drivers, including leisure activities such as a gym, local cinema or restaurant and café outlets are
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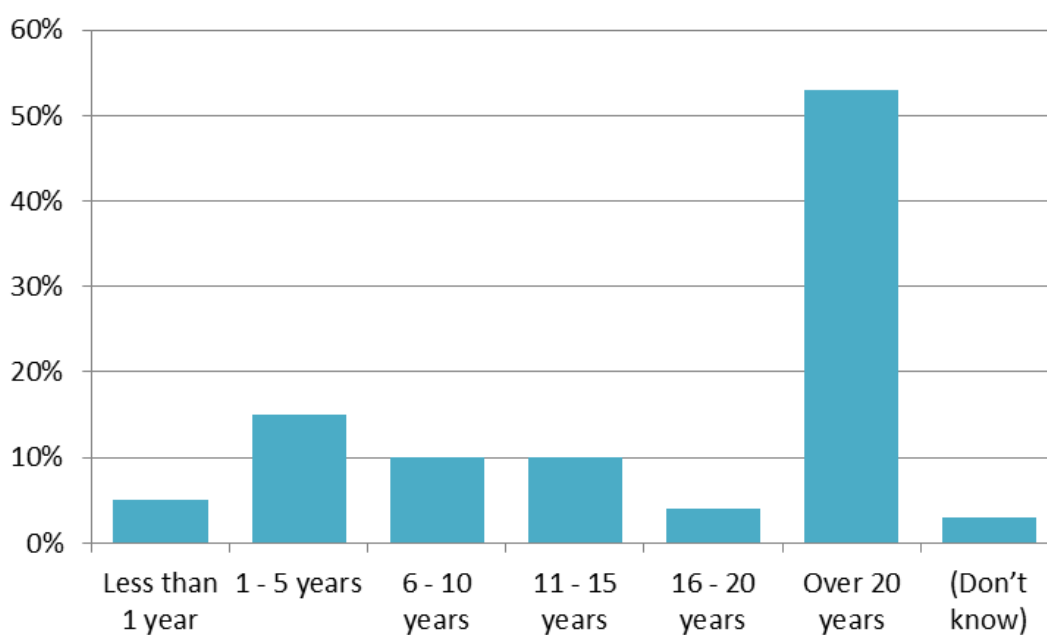
in relatively scarce supply. More could only be provided through the redevelopment of existing residential and commercial property.



2.20 The lack of footfall-generating leisure uses is compounded by the lack of commercial leisure uses such as coffee and mid-range dining chains which could serve a wider

catchment and broaden the range of users attracted to the Road. This could anticipate the change in local catchment that new residential development will bring.

- 2.21 The fundamental role of footfall-generators such as the Morrisons outlet is demonstrated by the concentration of pedestrian activity in the central section of Walworth Road in comparison to the northern and southern most segments.
- 2.22 In spite of the context of the rise of online shopping and concentration of comparison goods retail in the 'Major' and 'Metropolitan Centres' of Greater London, Walworth Road/Elephant and Castle display a below average rate of retail unit vacancy, which is demonstrative of the viability of Walworth Road as a centre in its own right.
- 2.23 The tenancy structure of the street is stable and appears to have a community of longstanding occupiers who own both the commercial unit and above shop space.



- 2.24 Over 50% of the businesses surveyed for this study have been located on the Walworth Road for over 20 years with data provided within the ROI study suggesting approximately a quarter of businesses have been located here for 50 years or more.
- 2.25 Of those businesses that reported in the survey that they have recently moved to the Walworth Road a number had come from other parts of the borough (particularly areas that have seen considerable regeneration such as London Bridge and Elephant and Castle) or other areas where development and regeneration has seen the offer/property prices change significantly – most notably Brixton and Kings Cross.

- 2.26 Respondents gave a range of reasons for choosing to locate on the Walworth Road including cheaper rents, a strong local market for their product, its connectivity to Central London and the regeneration that is underway.

Betting Shops, Pawnbrokers and Money Shops

- 2.27 The Walworth Road and East Street area has a significant presence of non-retail uses that fall into the A2 use class. A large number of these uses are used for Payday Loan, Pawnbroker or Betting Shop and amusements activity. Analysis undertaken for this study and other research on behalf of LB Southwark suggests there are at least 20 units occupied by these activities.

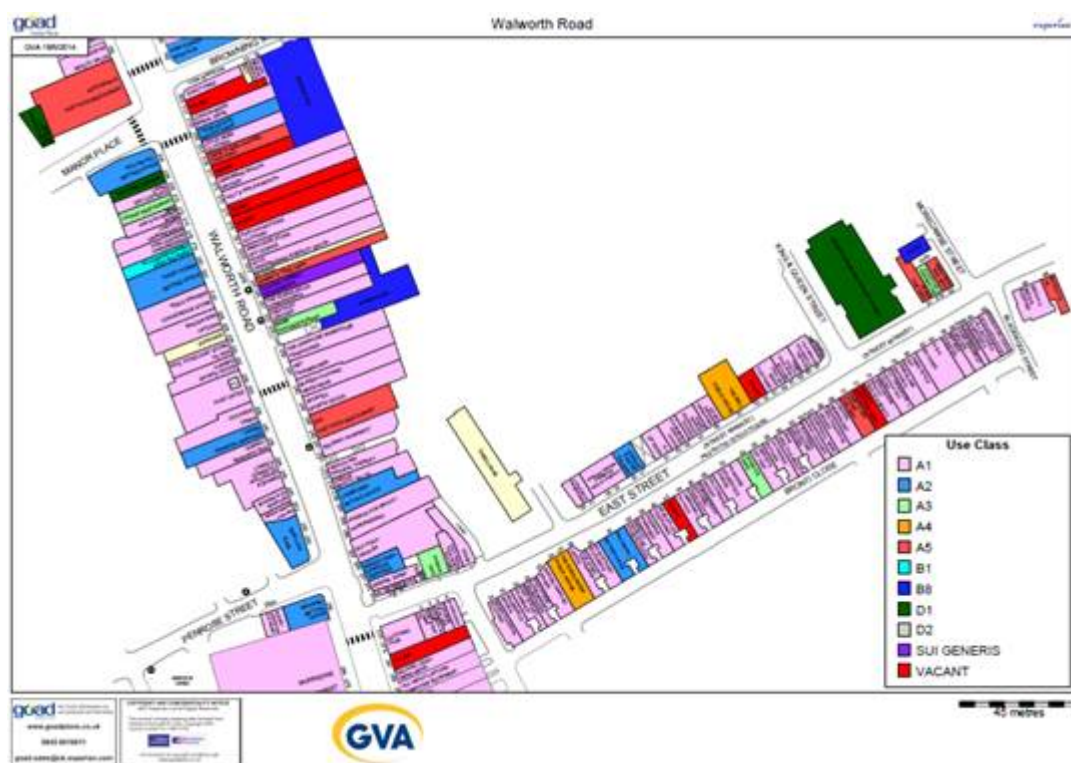
Betting Shop	Pawnbroker	Payday Loan
William Hill (2 outlets)	H&T Pawnbrokers (2 outlets)	The Money Shop
Ladbrokes	Pickwick Pawnbrokers	Speedy Cash
Bet Fred (2 outlets)	Fish Brothers Pawnbrokers	Oakham
Coral	Albemarle & Bond Pawnbroker	
Paddy Power	Claybrooks	
Cashino	Cash Converters	
Agora	CeX	
	Cash Generator	

- 2.28 Previous research suggests that there was a considerable growth in the presence of these activities following the onset of the recession in 2008. The Walworth Road is certainly not unusual in this regard with a number of other locations experiencing similar growth in these activities including areas of Hackney and Waltham Forest.
- 2.29 Demand for (and hence provision of) the payday loan and pawnbroker services have grown most strongly in locations where the surrounding population has low income levels, have been significantly affected by the recession through job losses or decreases in

- income or experienced lower access to 'mainstream' credit as banks tightened their lending criteria.
- 2.30 The growth in betting shop activity has been driven by changes to that particular industry. Online gambling has reduced the share of income for high street betting shops, forcing operators to look at new revenue streams, largely through the installation of 'fixed odds' betting terminals. Recent data suggests these machines now account for around half of a betting shops turnover and have fuelled a significant increase in profitability within the industry.
- 2.31 The proliferation of betting shops has been a result of this increased need for alternative revenue but also a restriction in the number of fixed odd terminals that can be within one unit. Operators are permitted to have four terminals within each shop, given their profitability bookmakers have sought to open multiple outlets in areas of high demand to maximise their income.
- 2.32 Generally the presence of increasing numbers of betting shops, payday loan companies and pawnbrokers are considered to have a negative effect both on the high streets they are located on and the communities within which they sit.
- 2.33 Research undertaken by LB Southwark suggests that the public perceive that the area would benefit from having a lower number of these activities (ROI Study, 2014) and it was one of the most frequently raised issues when shoppers were asked what they disliked about the area.
- 2.34 Only 6% of the surveyed shoppers within the Walworth Road reported that they visited Betting Shops regularly, largely to use the fixed odds machines or bet on sporting events. 2% of shoppers reported visiting payday loan or money shops regularly to borrow money. This suggests that there is a disproportionate amount of units in this use when compared to users.
- 2.35 Whilst shoppers recognised that betting shops in particular played some 'social role' by providing a place to meet, the ROI Study also reflected the concerns the shoppers have with regard to the negative impacts of both betting shops and payday lenders, including a reduction in the diversity of shops, reduction in the attractiveness of the area as a destination, an increase in anti-social behaviour and negative health and well-being impacts.

East Street Market

- 2.36 East Street is a subordinate perpendicular street off the Walworth Road, which hosts the East Street market, one of the oldest markets in London, and a unique selling point of the Walworth Road.
- 2.37 One of LB Southwark's four largest council-managed street markets, it has 242 available pitches of which 120-180 are occupied (according to the Southwark Retail Strategy 2010-2013). It is a mixed street market, offering a range of affordable food produce, clothing, household goods and CDs/DVDs. Open Tuesday to Sunday with Saturday the strongest trading day, it attracts c.4,500 visitors per day according to an ROI study produced in Nov 2013. The market stalls are complemented by shops selling a similar range of goods, as well as providing a limited food and drink offer.



- 2.38 The majority of visitors are drawn to East Street market by the fresh food produce offer, with 64% of shoppers visiting the fruit and vegetables stalls in particular. This is followed at some distance by clothing stalls which are visited by 19% of shoppers. The study also clearly demonstrated that the shops are much less of a draw for visitors than the market stalls, with just 6% of visitors stating 'visiting the shops' as the purpose for their visit, and over half of visitors by-passing the shops entirely.

- 2.39 However, despite the continuing popularity of the market, the number of traders and range of goods at East Street Market have declined in recent years. This decline in part reflects wider challenges that all street/traditional markets are facing. A study produced by the LDA on London's retail street markets (June 2010) found that the performance of markets across London has been mixed over the last few years in part due to an increase in choice for shoppers (e-tail and out of town); and increasing competition from supermarkets which offer competitive pricing and more convenient opening hours. Markets managed by local authorities, such as East Street, however, are much more likely to have declined over the period, largely due to a lack of investment in the market infrastructure and supporting public realm.
- 2.40 There is evidence to suggest this may be the case for East Street, which is characterised by ageing infrastructure and crowded public realm, not helped by the long, narrow structure of the market, with little space available to dwell. These physical challenges combined with a weak relationship with the shops on either side of the market stalls, may be reducing the popularity of East Street as a shopping destination.
- 2.41 Despite these challenges, the growth of private markets, particularly speciality markets such as farmers markets and Christmas markets, suggests that there is potential for East Street market to evolve and exploit new opportunities, for example building on its established reputation as a speciality food destination..

Employment role

- 2.42 Walworth Road itself has not recently been a major focus for larger scale B Class employment activity. However, there is a history of small scale employment spaces in railway arches and within smaller yards along the railway corridor. The corridor has also been home to offices above shops.
- 2.43 The regeneration of many parts of London's traditional employment stock in other inner locations has driven a new demand in the area, with the relocation of service and some creative industries into the area.
- 2.44 The early development phases within the Elephant and Castle Opportunity Area have created new ground floor workspace and unlocked previously underused railway arches for a range of uses. The transport connections from Elephant and Castle have also driven a cluster of employment activities to the northern end of the Road.



- 2.45 The conversion of previously underused railway arches into a variety of retail and workspace has created a high quality business environment. The sensitive adaptation of Iliffe Yard is demonstrative of a successful working environment.
- 2.46 The Walworth Road corridor is structured by the presence of larger organisations in newer and more spacious workspace clustered at the north. Larger organisations representing the public sector, University of the Arts, South Bank University and the Peabody Housing Trust are clustered at the northern end of Walworth Road.
- 2.47 There are some issues with some of the existing commercial provision. The northern part of the Walworth Road corridor has seen the delivery of new large mixed-use buildings with ground floor commercial space. Significant parts of this area are under-occupied.
- 2.48 These spaces need to be tailored to a particular accommodation market in order to succeed at capturing the increasing demand from SME and creative industry communities in the area. A coherent strategy of clustering businesses in empty ground floor spaces in this northern segment is needed.
- 2.49 The Heygate Interim Uses Programme co-organised by Southwark Council and Lend Lease is an innovative example of delivering flexible and easy-to-let temporary accommodation for the local creative SME economy. The scheme will provide workspace for up to 60 different business occupiers in recycled and refurbished shipping containers. In order to cater for the desired SME and locally based start-up community, the workspace accommodation is supplemented by a bar and café to provide an attractive leisure and networking environment for future occupants. This innovative approach to providing workspace for the growing SME community complements the Iliffe Yard development.
- 2.50 This strategy of offering meanwhile use opportunities in the arches on Robert Dashwood Way could provide a solution to under-occupancy on this section of railway viaduct. In

the long-term, Robert Dashwood Way needs to be reinforced as a key corridor that services the wider area. Improving the public realm, quality of workspaces and legibility of the area in order to attract appropriate tenants to complement the Walworth Road corridor. This could include greater activation of the arches and their frontage onto Robert Dashwood Way, but also better integration of new ground floor units.

Community role

- 2.51 Walworth Road also serves as a focal point for the local community alongside its local retail and employment centre functions. There are numerous voluntary sector and community group based in the area, offering a range of community outreach services and activities. Examples include the InSpire Community Organisation hosted at St Peters Church, which organises a multitude of activities as well as helping to coordinate local stakeholders in tackling area-based issue, and providing training courses to help upskill local people in ICT alongside child-oriented creative courses in dance, drama and music.
- 2.52 CoolTan Arts, an award winning arts in mental health charity run by and for adults with mental distress is based at 224-236 Walworth Road, and provides workshops, self-advocacy, art projects, stigma-busting cultural walks, a public art gallery, and an inclusive volunteering and training programme for people across London.
- 2.53 There are also a number of voluntary sector groups based in the offices at 9 Larcom Street, including 2nd Chance UK, a charity offering young men and women secure and supported routes into employment through a structured learning, training and working environment.
- 2.54 Whilst not based on the Walworth Road itself the Creation Trust has a major impact on the communities that surround it. Based in a multi-purpose facility on Thurlow Street the Trust provide a range of services. At the strategic level the Trust act as a conduit for the community to understand the ongoing regeneration of the area, however it runs a number of hands on programmes aimed at reducing worklessness (for example through training, pop-up shop initiatives), supporting vulnerable parts of the community (including older residents and by providing youth workers) and a range of engagement projects (particularly based around arts).
- 2.55 The Walworth Road study area also contains a large and growing number of places of worship. These include St. Peter's Church at Liverpool Grove, East St. Baptist Church on East Street, the Walworth Methodist Church, the Elin Church of Pentecost at 292 Walworth Road, and the Bishop Climate Ministries based at Chatelaine House.

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- 2.56 The East Street Baptist Church organises a toddler playgroup on Friday mornings alongside its usual schedule of services and hosts a number of Youth Bible study clubs on Fridays. The Walworth Methodist Church operates accommodation for 17 previously homeless residents and is currently negotiating with a potential agency partner to use the remaining 36 rooms in the former hostel as temporary accommodation for single homeless people. In addition to servicing their religious followings, these institutions contribute to the social cohesion of the locality through such charitable activities.
- 2.57 St Peter's and Walworth Methodist Church also provide conference and meeting room facilities, providing formal community spaces which serve to integrate disparate groups in the local area.
- 2.58 Three NHS community medical centres are located on the Walworth Road; the Walworth Dental Care, the Manor Place Doctors' Surgery, and the Walworth clinic based at Larcom Street, which provide access to NHS treatments for the local residential population
- 2.59 To further cement and enhance the community role of the Walworth Road, the council is currently undertaking significant works to bring the old Walworth Town Hall back into use following a fire which severely damaged a large proportion of the building.
- 2.60 The rejuvenated Town Hall building will provide a mixed use community asset that enhances the former Newington Library and provides a new exhibition space for the Cuming Collection and Southwark Museum.
- 2.61 The aspirations for the building also include the provision of a range of flexible community spaces, able to be used by a number of community groups, businesses and individuals for meetings or functions. The building will also provide a new space for services provided by Southwark Registrars, enabling weddings, civil ceremonies and citizenship ceremonies to be undertaken.
- 2.62 The combination of exhibition space, library facilities, community space and, health facilities allied to the new community square being delivered to the north of Wansey Street as part of the Elephant Park scheme will create a new high quality community hub for existing and new residents in the area.
- 2.63 The role of the diverse retail provision on the Walworth Road in providing a focal point for the local community should also not be overlooked. Over 50% of shoppers on the Walworth Road travelled to and from their homes by foot, which is indicative of the centrality of the retail offer in everyday community life (ROI, 2014).
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3. Spatial Structure

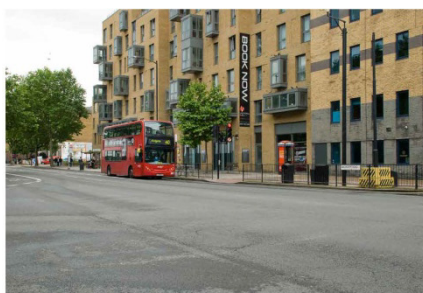
- 3.1 Walworth Road is one of six roads that come together at Elephant and Castle. It is distinct because more than the other roads around Elephant and Castle it is clearly a high street with a functional relationship with the areas of housing around it.
- 3.2 There used to be two large social housing estates on Walworth Road. To the north the Heygate and to the south the Aylesbury. While the Aylesbury Estate remains, subject to a phased process of building renewal, the Heygate has been demolished and will be replaced by a new high density housing led development. These changes mean that the residential community around the road is smaller at the moment than it used to be, but also that in due course it will be bigger than it has ever been.
- 3.3 Half way down (or up) the road a long established street market occupies East Street. This is one of four spatially and socio-economically distinct areas:

1 - The entrance to Walworth Road from Elephant and Castle (whose eastern side will change with the Heygate redevelopment and whose western side has great potential for improvement).

2 - The high street (the central section of Walworth Road)

3 - The market (East Street)

4 - The southern end which turn in to Camberwell Road and connects the high street with Burgess Park.



1 - WALWORTH ROAD ENTRANCE



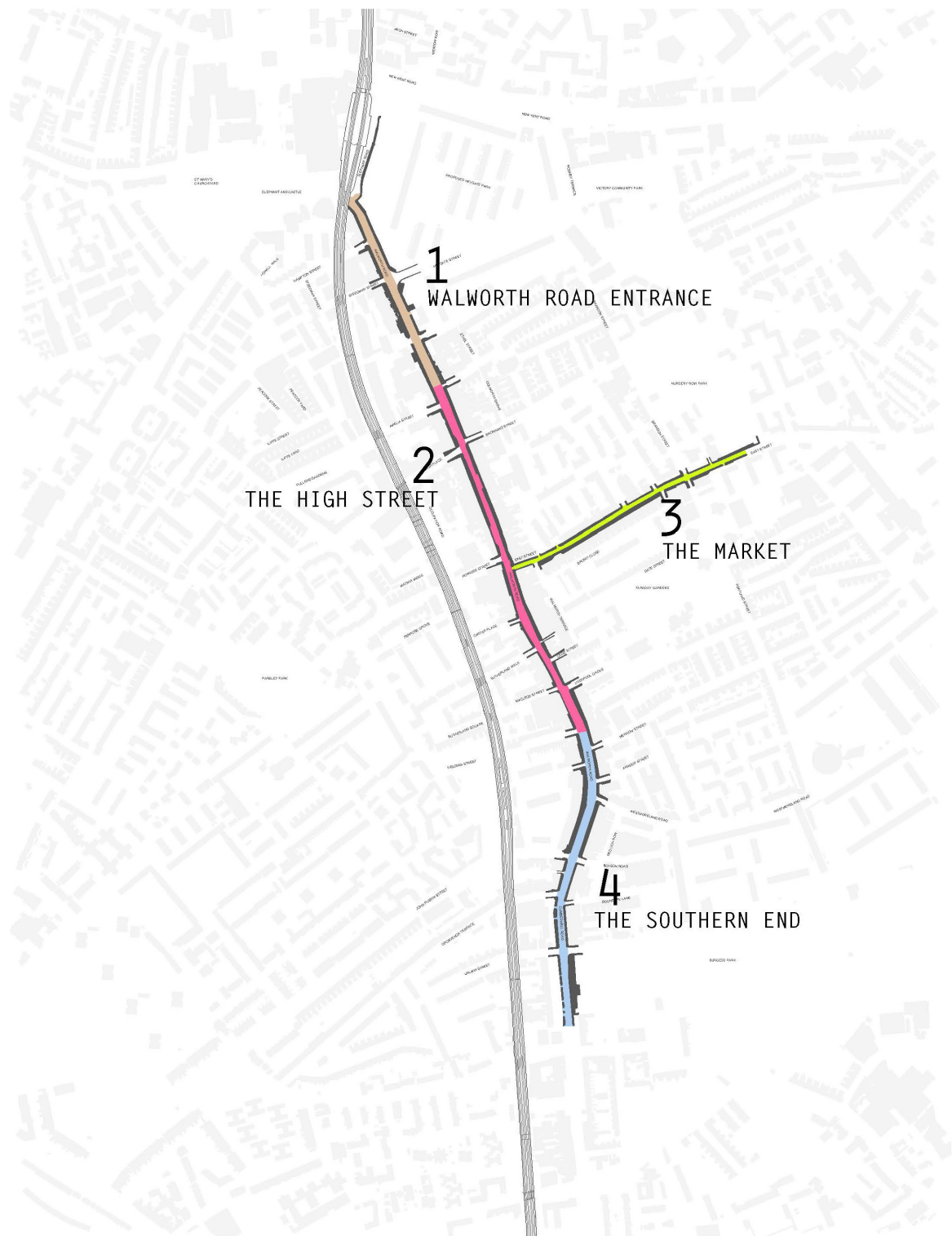
2 - THE HIGH STREET



3 - THE MARKET



4 - THE SOUTHERN END



(1) Walworth Road Entrance from Larcom Street to Elephant and Castle, including the Heygate Estate site. This is the northern gateway and will be impacted by the regeneration of Elephant and Castle and the Heygate Estate. The street section from building front to building front is broader, with wider pavements and some street trees and landscaped areas. There are some historic buildings from the Victorian era. More

recently, this area has seen the development of higher density housing and student housing. There is also a hidden, but active employment corridor running either side of the railway viaduct to the west. Businesses are located in arches, traditional yards as well as in more recently developed purpose built ground floor spaces.



Dashwood Studios



Robert Dashwood Way

(2) The traditional 'high street' offer, broadly running from Larcom Street in the north to Merrow Street in the south. This includes the densest retail activity and includes a collection of smaller shops, supermarkets and some offices above. The street wall is largely continuous and the pavements are either narrower or more intensely used than the area to the north and south. This is the core of the traditional high street character. Importantly, there is also a number of east – west connections through the area.



231-235 Walworth Road



Southern view of Walworth Road from no. 233

(3) East Street Market. This is a long standing and traditional London street market, selling a range of food, clothing and smaller low price household goods.



East Street Market



East Street Market Entrance, Walworth Road

(4) The Southern End from Merrow Street to Burgess Park. This area has an end of high street character, with a falling off of retail activity and pedestrian density, some of which may be related to a falling off of housing density relating to the park to the south. There are important connections here, particularly to the east and the regenerating Aylesbury Estate.



The Gateway Estate, Walworth Rd frontage



Walworth Rd looking north from No. 353

Observations



Walworth Road viaduct from the Elephant & Castle Shopping Centre

Walworth Road could provide a stronger presence at Elephant and Castle through improvement to the railway bridge and the space around it. This is the front door.



Nos. 94-96 and Julian Markham House

The shops and public realm at the northern end of the Walworth Road need to be carefully managed to improve quality with a finer grain of uses that support street life. The western side of the road should complement, but not replicate redeveloped Heygate.



Future residential use at ground floor is not appropriate at this key location, and should be sympathetically designed wherever it arrives.



Elephant Road already provides a rich and diverse environment with a strong Latin American presence. Current uses should be supported to maintain these uses which cater for the local community.



Ground floor units are not at grade and access arrangements are blocking a direct relationship between the street and ground floor units. The railway arches are not double fronted. Improvements to the yards and streets west of Walworth Road have potential to transform the wider neighbourhood. Partnership working to improve the public realm, access to ground floor units and the railway arches is essential to turn this area into a high quality piece, making the most of its central London location as well as immediate context, spatially, economically and culturally.



Iliffe Yard

Iliffe Yard – a local success providing workspaces as part of an attractive environment. This example should inspire proposals for improvements to the existing area west of Walworth Road as well as new developments within this piece of the city. The council should consider opportunities for initiating the development of a phased public realm framework plan that included guidance on development to both retrospectively improve the area and help ensure the quality in future developments, both spatially and in terms of use / support for small scale businesses.



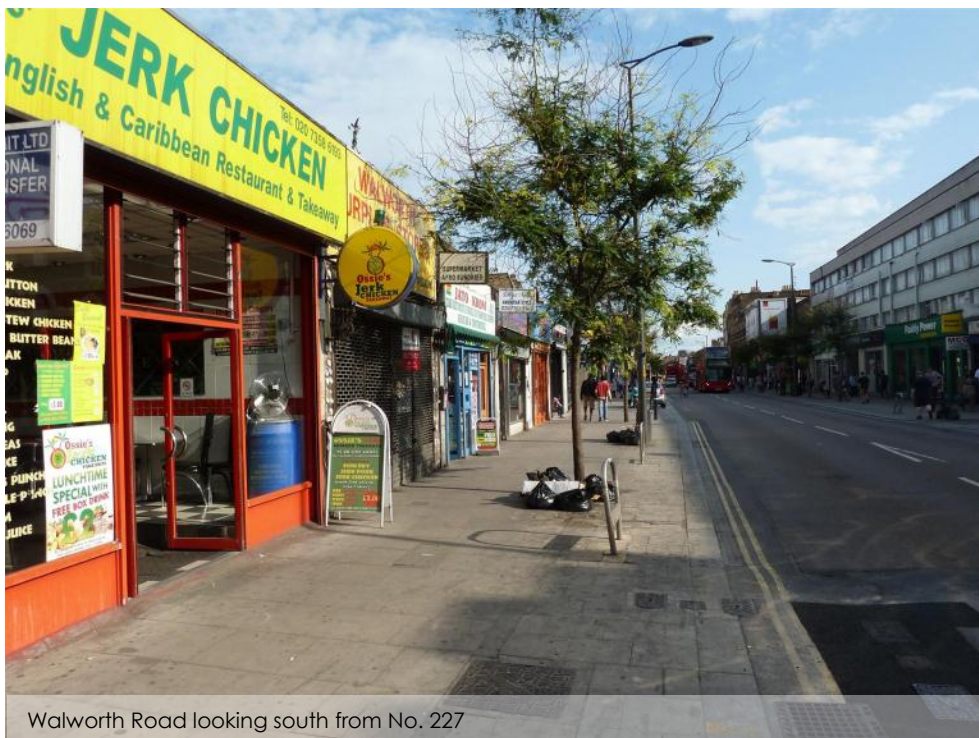
Walworth Road – Steadman Street Junction

Poor public realm materials can undermine investments by providing a weakened setting for new buildings. Similarly, failure to create some coherence between development and public realm materials reinforces a 'piecemeal' environment rather than bringing individual investments together to create a distinct character.



Walworth Road – Manor Place Junction

Recent public realm improvements should form the basis for further improvements up and down the road; stretching from Elephant and Castle to Burgess Park to tie the area together.



Walworth Road looking south from No. 227

The public realm also needs to be maintained and repaired to maintain a high quality environment and demonstrate commitment to the area. Maintaining a good public realm will encourage investment within the built fabric of the area.



Walworth Road – Penrose Street Junction

While banks and similar uses are strong assets for the high street the many betting shops undermine quality. With blocked off windows and unattractive graphics they contribute to a sense of low quality and lack of care in the management of the high street.



East Street looking east from No. 20



East Street Market

The experience of East Street varies greatly depending whether the market is open and how many stalls are open. It is a great asset that could be improved to become much better; in fact improvement is likely to be necessary to sustain it in the future. Improvement could include layout, management, variety of offer, relationship to permanent shops and integrated social spaces for the local community.



Walworth Road looking south from MacLeod Street junction

Attractive buildings on the high street are let down by the poor quality shop front at ground floor level, reinstating or supporting the delivery of more 'sympathetic' shop fronts along this stretch of the Walworth Road will greatly improve the character of the area.



No. 305 Walworth Road

Attractive shopfronts on the high street have been retained and should be complemented by investment in the public realm. They should be used as an exemplar for the installation of improved shopfronts in other locations.



No. 322-344 Walworth Road

Improvements at the southern end of the Walworth Road could strengthen it overall by providing a greater level of footfall. The strategy should seek to increase the footfall drivers in this location (such as new retail and leisure offers) and improve the quality of public realm linking to the Aylesbury Estate.

Assets

- 3.4 The character of the Walworth Road is established by its physical assets as well as its businesses and residents. These set a rich context for economic, community and social activities that are carried out along the Road each day.
- 3.5 A network of green spaces, heritage buildings, workspaces, businesses public realm and community projects permeate the area, provide local landmarks and destinations that stitch together the diverse character areas.
- 3.6 As noted through our "User Journey" interviews the Walworth Road plays different roles for different individuals or groups, each having different reasons for visiting and destinations the head towards. Understanding how these users utilise the road and how their destinations can be better linked to encourage greater usage is vital for ensuring the vitality of the Walworth Road in the future.



- 3.7 Overall the key asset for the Walworth Road is the **deep hinterland** and **large residential community** with which it connects. It benefits from good basic infrastructure (including the many railway arches) allowing this catchment to access the range of retail and community provision.
- 3.8 **Elephant Road** already provides a rich and diverse environment; businesses cater for a range of community needs but have a strong orientation towards the Latin American community. Whilst there are limited units each is activated in a complex arrangement of businesses that provide a wide range of services from one location. The road provides a

- vibrant and active gateway to the Walworth Road and the current uses should be supported and their setting enhanced and integrated into the wider area.
- 3.9 The **Town Hall** is a striking building and provides a key landmark for those arriving on the Walworth Road from the north. Its diverse range of community services and facilities will become a major footfall driver, influencing how visitors access and utilise the wider area.
- 3.10 **Iliffe Yard** and the wider **Pullens Estate**, lying to the west of the Walworth Road is a local success, providing workspaces as part of an attractive, reinvigorated environment. It draws a diverse range of creative activities and businesses to the area and is becoming a visitor destination in its own right. This should inspire proposals for improvements to the existing area west of Walworth Road as well as new developments within this piece of the city. More recent developments include ground floor commercial spaces that can be enlivened to create an active employment cluster.
- 3.11 Recent **public realm** improvements have enhanced a number of key gateways and access points and greatly improved the pedestrian environment in key locations. These should form the basis for further improvements up and down the road, joining up areas of previous investment to create a continuous high quality streetscape. Where possible interventions should be extended to the east-west 'feeder roads' and rail viaducts to encourage greater pedestrian and cycling permeability.
- 3.12 The high street has a high occupancy rate and voids appear to re-let relatively quickly. The Walworth Road is a place for new businesses to start and grow, with a wide range of established retailers alongside new entrepreneurs taking their first steps into retailing. These **shops have become destinations** in their own right, tailoring their offer to their local market. Engagement suggests that Oli Food, Lynes and Chatica (to name a few) are equally likely to be the reason for a visit as Tesco or Morrison's.
- 3.13 East Street itself varies greatly depending on when the market is open and how many stalls are open. **East Street Market** is a great asset that is the major reason many visit the area and is vital in sustaining the vibrancy of the Walworth Road and its surrounding communities. Traders recognise they face a challenge in continuing to meet shoppers' needs and compete with high street stores, but are focussed on evolving the offer and environment to make this happen.
- 3.14 **St Peter's Church** is a major landmark and architectural icon and, alongside other buildings along **Liverpool Grove** more widely (such as Malvern House), create a characterful cluster of buildings. Whilst these assets are somewhat obscured by the more recent buildings

- fronting the Walworth Road they are still a draw for visitors and residents, particularly as St Peter's expands its role as a community asset. The green spaces around St Peter's Church are a critical part of the growing green network around the area.
- 3.15 The character of Liverpool Grove is supported by the cluster of striking buildings along the Walworth Road between Liverpool Grove and Merrow Street and beyond to Westmoreland Road. These provide the core **'high street'** character and are designed to create an impressive landmark for those arriving from the south. Much of the Road is older and has a **fine grained character**, however the impact of this asset is somewhat diminished by the installation of more modern shopfronts.
- 3.16 Areas such as **Portland Street/Liverpool Grove and Sutherland Place/MacLeod Street** (for example) provide a calm and attractive environment, connecting existing and new communities to the Walworth Road. They provide respite from the Walworth Road itself and choice for residents in how they move through and across the area to access many of the assets. Improving the legibility, gateways and connections to and through these spaces and using them as a benchmark for other opportunities (such as Amelia Street and Manor Place) should create a network of tranquil and engaging routes.
- 3.17 The street spaces feeding into the Walworth Road are supported (and support) a network of formal and informal **green spaces** that provide further opportunities for respite from the hubbub of the Walworth Road as well as major assets for the community to use for a range of leisure activities. From the large 'park' settings of Nursery Row and Faraday Gardens to the east, Pasley Park to the west, 'pocket parks' such as Pullens Gardens, and less formal spaces such as the community garden to the north of Crampton Street, these green spaces are vital to the character of the area, and support the core commercial activity of the Walworth Road. Links to and between these spaces have (in some cases) also been 'greened' – providing an initial **network of green routes** and spaces that connect through the area and onwards to Burgess Park, the Old Kent Road, Elephant and Castle and Kennington.
- 3.18 New developments along the Walworth Road will provide new assets and opportunities. The redevelopment of the **Manor Place depot** will be particularly important in both creating a new residential community but also bringing a number of historic buildings back into active use. The development will need to integrate fully into the wider network of streets and spaces to maximise its benefits to the Walworth Road, but it provides an opportunity to create a new depth of activity similar what has been achieved at the Pullens Estate.

3.19 Our analysis of the character areas and assets within the Walworth Road area suggests that it plays a wide range of roles locally and is affected by a range of designations that shape its future. These include being:

- Part of, and a prime access to, a growing major town centre;
- An area of change and regeneration;
- A place to live with established and changing communities;
- A successful high street with a 'protected shopping frontage';
- Home to a traditional London street market;
- A place where a fine grain, diverse small business community operates;
- A location for education and arts activity;
- A focus for local amenity and servicing;
- A civic and community hub; and
- A key movement corridor

3.20 It is therefore vital that any future interventions seek to work with this framework and respond to each of these roles, developing sympathetic and multi-faceted approach to investment that enhances and benefits each role.

Transport and Connectivity

3.21 Whilst the character of Walworth Road and East Street themselves are fundamental to the sense of place and structure of the offer the area is equally strongly defined by its connectivity and permeability, both as a strategic movement corridor north-south but also as a central point for a range of east-west movements within and between communities.

3.22 The Walworth Road acts as a primary traffic route from South East London to the central City via the Elephant and Castle. The Road carries a significant amount of vehicular movement and is a principal thoroughfare for public transport, with 10 bus routes passing through the central Walworth Road – East Street stops.

3.23 Analysis of the area undertaken as part of the adopted Elephant and Castle SPD highlighted the vulnerability of cyclists and pedestrians along the Walworth Road as a result of the scale of traffic movements. As a result the majority of identified routes tend to 'by-pass' the Road, instead being signed via Portland Street and Brandon Street principally.

- 3.24 The cycle super highway further draws cyclists away from the Walworth Road, with the route running to the west of the Walworth Road along Kennington Park Road and connecting to the Walworth Road via Elephant and Castle, Hampton Street and (indirectly) via Penton Place.
- 3.25 The strategic north south vehicle movements, in particular the bus routes, are a particular source of footfall for the Walworth Road, both in terms of local residents using the road to access services and therefore shopping en route. They also increase the awareness of the area to a wider catchment that may be 'passing through' the area on their way to other destinations.
- 3.26 However, as noted, despite the potential benefits the levels of traffic do create some issues in terms of the quality of the pedestrian environment which in turn is reportedly driving other forms of footfall off the road. The potential bypassing of the core of the Walworth Road needs to be overcome by improving the east-west links, particularly from the two major cycling routes, providing attractive access points (allied to cycling facilities) to encourage cyclists to use the shops on the Walworth Road as they move between Burgess Park and Elephant and Castle.
- 3.27 The east-west linkages have a much wider importance for the vitality of the Walworth Road, acting as the key arteries that connect the surrounding communities into the road. The ROI Study recognises the importance of pedestrian access to the health of the Walworth Road with 50% of respondents accessing the road on foot suggesting it is the relationship and permeability of the road to the surrounding area that underpins the vitality of the retail offer.
- 3.28 As shown, there are a large number of 'side streets' and feeder routes into the area from both sides.



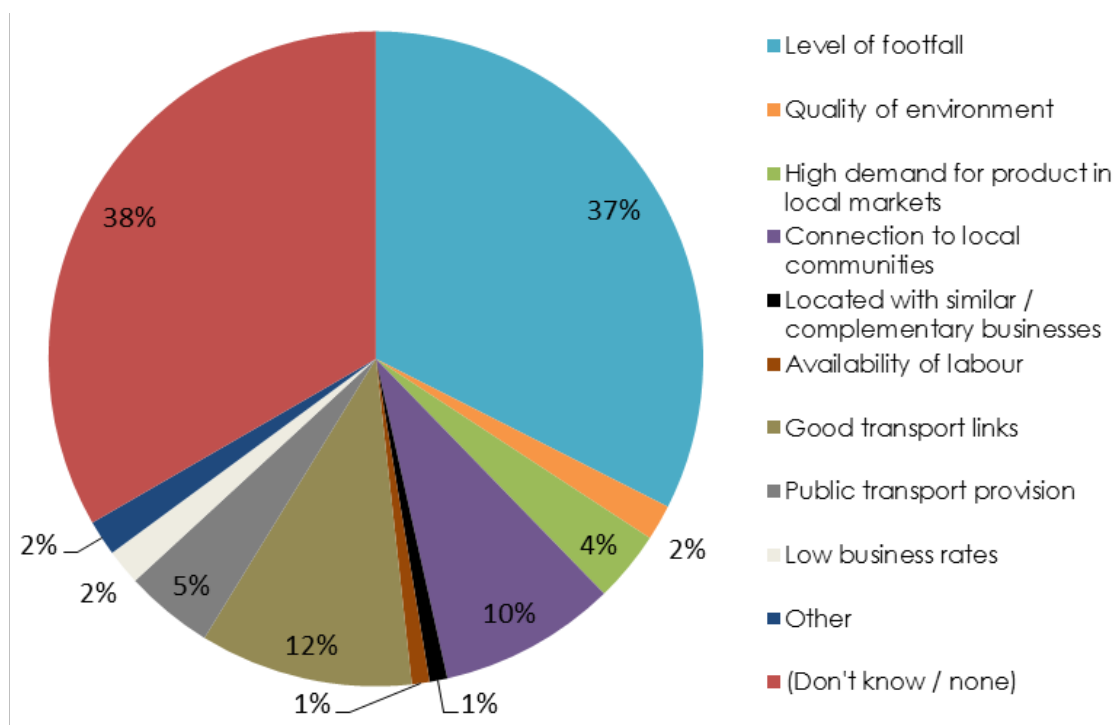
- 3.29 The Walworth Road area is somewhat unusual in London. Despite the length of the raised rail line that runs parallel to the Walworth Road it has a high number of viaducts that allow both pedestrian and vehicle movements. Other areas that have a significant level of rail infrastructure (such as Vauxhall or parts of the Southbank/London Bridge area) do not have such permeable structures and there is a significant level of physical severance.
- 3.30 However, whilst the physical severance is not such a significant issue the quality and nature of the through connections do create a level of perceived severance that many residents may struggle to overcome. The routes through the viaducts are not well lit or of

- a high design quality, decreasing their attractiveness for pedestrians, especially at night. Also, their relationship to streets on either side is not always direct, creating poor long range visibility and heightening the perceived sense of low public safety.
- 3.31 Furthermore, how these west to east routes connect to the Walworth Road is also not always clear or of a high design quality, weakening the relationship between these lateral routes and the road itself.
- 3.32 However, the viaducts do, to a degree, help to concentrate footfall into key streets and routes, providing predictability to where the highest concentrations of activity will be. This allows both commercial activity and public realm investments to be focussed in order to create a significant impact in terms of improving accessibility.
- 3.33 Significant improvements have been completed at a number of the key junctions and initial parts of the 'feeder streets' between the Walworth Road and the viaducts, this has included some greening of routes (such as Carter Place), more significant public realm and traffic calming in Sutherland Place and MacLeod Street and 'entrance' enhancements to Fielding Street and Penrose Street.
- 3.34 Where these works have been completed the difference in the attractiveness and 'feel' as a pedestrian route is much enhanced. However, in many cases the improvements fail to extend into and beyond the linked viaducts, reducing the benefits in drawing wider pedestrian movements to the Walworth Road.
- 3.35 To the east of the Walworth Road there are fewer physical barriers to access, however there are still a number of perceived access issues that reduce the utilisation of the connections. Key gateways and entrances to the Walworth Road are weak and incidental spaces and linkages between the major north-south thoroughfares are of lower quality or indirect.
- 3.36 In particular there is a weak linkage between the Walworth Road and the key community assets that lie on the surrounding streets. For example the links between the Creation Trust and the Aylesbury Medical Centre could be improved to promote linked trips, this will become much more important as a new community facility and medical centre is brought forward in the first phase of the Aylesbury Estate regeneration.
- 3.37 The quality of connections can also be enhanced between Thurlow Street and the Walworth Road, particularly to the south through or close to the Aylesbury Estate, these will be particularly important in drawing new residents through the area to the Walworth Road.

- 3.38 East Street is another key link that can be enhanced to ensure it provides a high quality environment both on market days and when the market is not operating.

4. The Business Environment

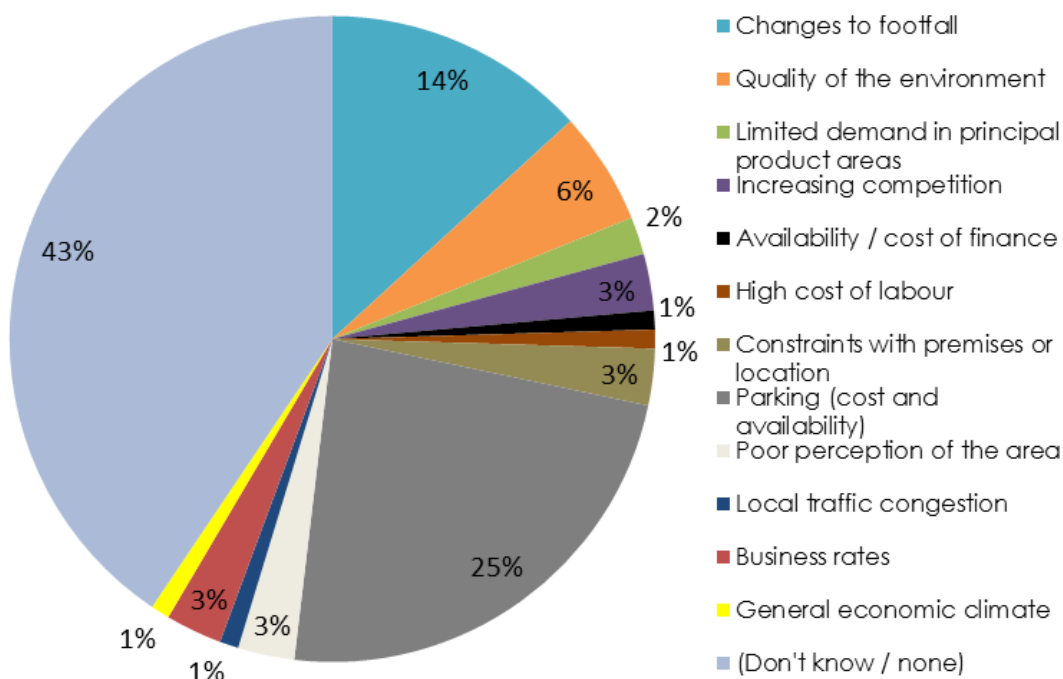
- 4.1 The physical assets in the Study Area provide the core framework for attracting visitors and shoppers to the area and provide the context for the retail activity. The business survey specifically focussed on developing an understanding of how the Walworth Road and its surrounding area supported or challenged business activity.
- 4.2 The survey asked respondents to identify the particular advantages being located on the Walworth Road offered their business. Almost 40% of businesses felt they were unable to identify any particular advantages the Walworth Road offered their business.
- 4.3 The most frequently identified strength of the Walworth Road (raised by 37% of respondents) is the level of footfall passing the retail units. This suggests that both connections to/from local communities are important but also that the strategic role the road plays as an access route to/from Central London.



- 4.4 The importance of the connections between the commercial activity and the area's communities is further highlighted by the proportion of respondents who felt that either high demand for their product locally or connections to the local communities were particular advantages for their business. Anecdotal evidence from stakeholders and the user journey analysis supports the strength of these connections, indicating that a number of retailers have tailored their stock and offer to meet very local demands.

4.5 Public transport and more general transport links were also seen as relative strengths of the area. Again this was borne out by stakeholder engagement and the ROI Study where it has been reported that shoppers access the area from a wider catchment via public and private transport. Few businesses felt the quality of the public realm, co-location with other similar businesses or the availability of a suitable work force were of particular benefits to the businesses.

4.6 Businesses were also asked what factors they felt placed limitations on their activities. Over 40% either felt there were no specific factors, declined to comment or were unsure, of those businesses that did respond there were a wide range of factors identified.



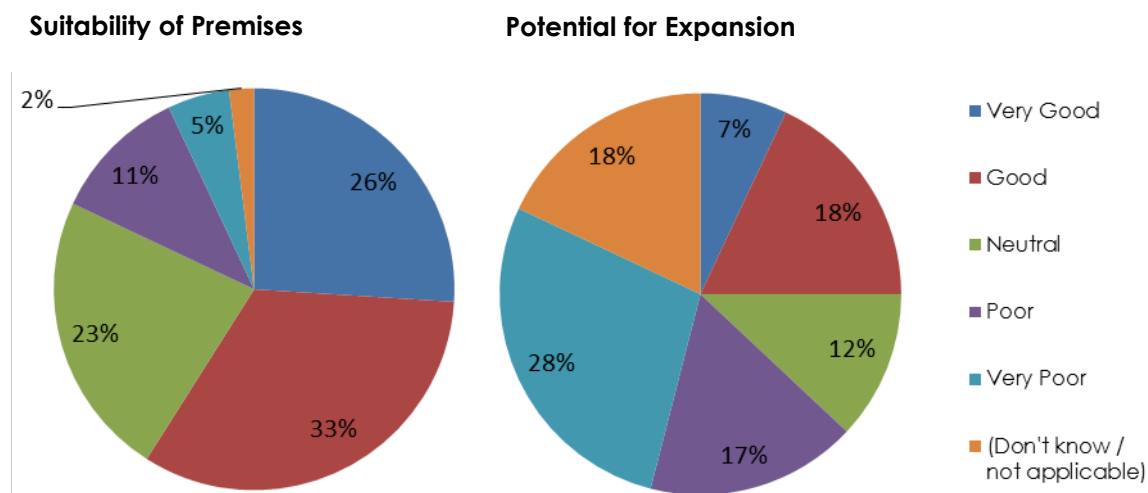
4.7 The largest single theme to be identified in the survey was the lack of adequate parking facilities within the area, with a quarter of all respondents feeling this had a negative impact on trade. Our stakeholder consultation with business representatives such as Business Extra and the Street Traders Association reinforced this view with a general feeling that both the cost and scale of provision are issues. Whilst parking is clearly an issue for traders it needs to be considered in the context of the public transport accessibility (which is seen as a real strength) and the increasingly 'urbanised' catchment, which over time is likely to reduce car dependency for shoppers.

4.8 A significant number of businesses recognised the challenges faced by falling footfall within the area. The cause and impact of this was well recognised by a number of stakeholders who felt the loss of residents within the Heygate Estate prior to

redevelopment had a significant impact on the area. However, a number of stakeholders (including representatives of the East Street traders) felt that the size of catchment and footfall may have reached its lowest point and delivery of major regeneration schemes will begin to build trading opportunities again.

4.9 In the light of the potential growth in the local catchment the concern raised regarding the quality of the environment is of particular importance, even if it was less well represented through the survey. It will be important in the future to ensure the quality of the environment matches that of the new developments to encourage new residents to utilise the Walworth Road.

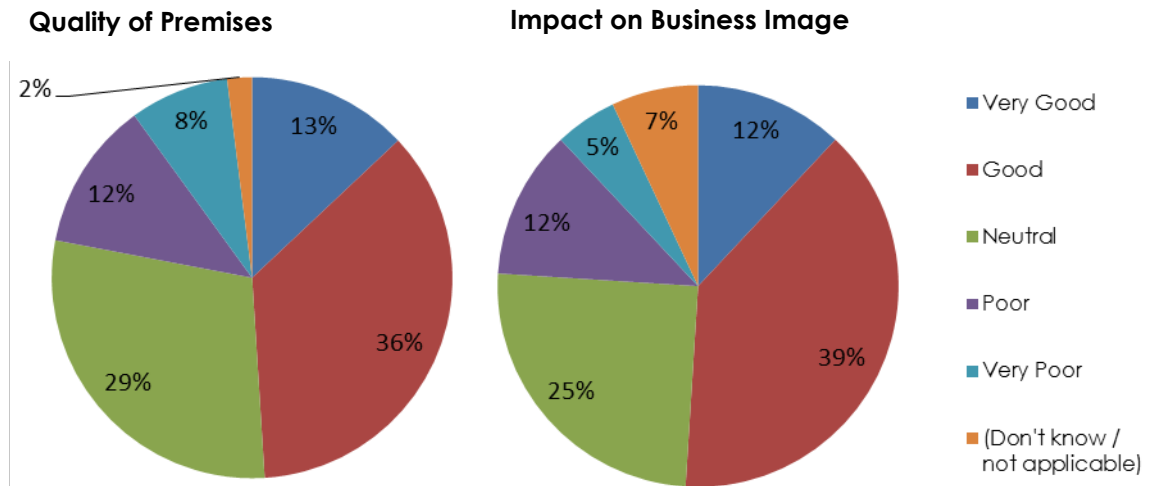
4.10 The survey also focussed more specifically on the property stock within the area and how this met business requirements.



4.11 Almost 60% of businesses felt that their premises met their current needs, with 16% feeling they were poor or very poor and therefore potentially not suitable for their requirements. However the majority of businesses felt that their premises offered little scope for their business to expand suggesting there may be a challenge in the future for the Walworth Road in accommodating successful businesses.

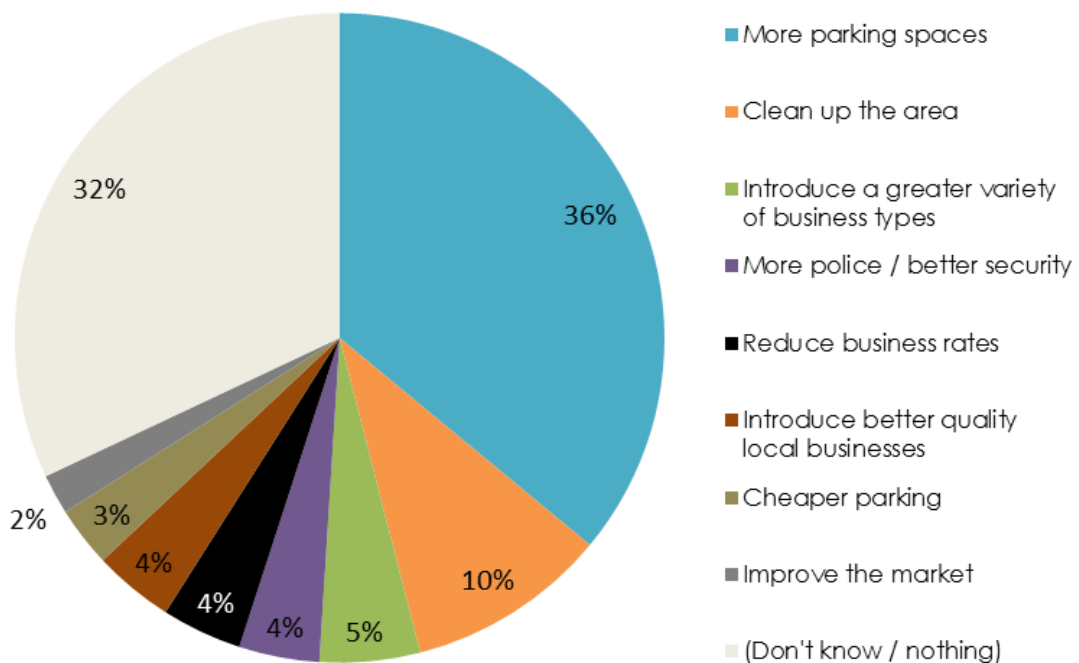
4.12 Given the nature of the units on the road it is unsurprising that growth potential is seen as being an issue, however redevelopment and regeneration in key areas may prove beneficial in providing a greater range of spaces.

4.13 Businesses were also asked for their views on the quality of the premises in from which they operate and their perception of the contribution this makes to the 'image' of their business.



4.14 Despite a number of businesses feeling the quality of the area generally had some negative impacts on their trade a significant proportion felt that their premises were of good quality and made a positive contribution to the image of their business. However, it is worth noting that over 25% of businesses felt that the impact and quality was neither good nor bad.

4.15 Looking forward businesses were asked what they would most like to see improved within the area to better support their businesses.



4.16 Almost a third of businesses surveyed were not able to identify improvements that could be made. Concerns around parking were again raised with 36% of respondents feeling

the key improvement could be through the provision of additional parking a further 3% felt parking could be made cheaper.

- 4.17 10% of respondents felt that 'cleaning up' the area would be beneficial to them, the second most popular response where an intervention was identified. A similar proportion of respondents felt that improving the business base could also help improve the area, either through a greater variety of businesses or through better quality local businesses.

5. A Dynamic Context

- 5.1 The Walworth Road has a history of evolving to meet the needs of its dynamic context, its retail, housing and employment offer has consistently evolved to ensure it remains relevant to the communities that use it.
- 5.2 There are a range of influences that will impact the future of the Walworth Road, from the large scale redevelopment projects of former social housing estates through to the international changes to shopping habits. Each will impact on the way the Walworth Road is used and the offer it makes.

Development will expand the consumer base

- 5.3 Lend Lease and Delancey are working in partnership with London Borough of Southwark to deliver the large-scale redevelopment of the Elephant and Castle Shopping Centre as well as the adjacent Heygate Estate. These developments are accompanied by the regeneration of the Aylesbury Estate in partnership with Notting Hill housing. The changes brought about by the landmark redevelopment of Elephant and Castle are likely to catalyse large-scale change in the surrounding and extended catchment of Walworth Road; namely the socioeconomic and demographic composition of the local communities.
- 5.4 The redevelopment is predominantly high-density and residential-led in nature, owing to the strategic position of Elephant and Castle in relation to London's Central Activities Zone and the need to increase the size and variety of housing stock. In line with the London Plan (2011) and Southwark Core Strategy (2011) the Elephant and Castle Opportunity Area Planning Framework has set a target of facilitating 4000 net new homes and 5000 jobs.
- 5.5 However the provision of retail floorspace as part of mixed-use residential-led development has the potential to change retail dynamics in the Walworth Road area. The redevelopment of the Elephant and Castle Shopping Centre will change the scale and nature of comparison retail, and would not compete directly with the primarily convenience retail character Walworth Road.
- 5.6 The timing of the redevelopment around Elephant and Castle has short to medium term implications for the viability of retail on the Walworth Road, as the catchment area experiences decanting associated with the demolition of the Heygate and Aylesbury

Estates in the first phases of development. However the long-term opportunities presented by net population uplift provide opportunities for the evolution of the Walworth Road to adapt to its changed local community needs and demands.

Growth will come over the long term

- 5.7 The immediate catchment of Walworth Road will evolve significantly owing to the redevelopment of large scale social housing estates; the Aylesbury and Heygate Estates.
- 5.8 The Heygate Estate has been in the process of being demolished in its entirety, from the period from April 2011 until its recent completion in July 2014. The 'decanting' of the estate population to other sites commenced in 2007, resulting in the loss of over 3000 residents. The current outline masterplan proposed by Lend Lease foresees the construction of 2469 homes on the Heygate site, accompanying a further 235 home and 284 home developments at Trafalgar Place and One The Elephant respectively.
- 5.9 The residential units at the adjacent sites at Trafalgar Place and One The Elephant should be completed by 2016. The remodelled and mixed tenure Heygate Estate – rebranded as Elephant Park – will be completed by 2025. The former Heygate Estate comprised exclusively of 1200 housing units; therefore the Elephant Park development shall result in a net increase of the on-site housing stock by c. 1269 homes. The timing of delivery is summarised below.

	No. of Units	Construction Timeframe
First Development Site (Trafalgar Place)	235	May 2011 – 2015
Phase 1 Masterplan Site	315	Q3 2014 – Q1 2017
Phase 2 Masterplan Site	528	Q1 2015 – Q2 2018
Phase 3 Masterplan Site	696	Q2 2017 – Q4 2020
Phase 4 Masterplan Site	256	Q2 2020 – Q3 2022
Phase 5 Masterplan Site	674	Q3 2021 – Q2 2025
Total (Trafalgar Place and Masterplan Site)	2,704	2015 - 2025

(Heygate Estate, construction phasing – submitted Detailed Phasing Plan (2013))

- 5.10 The Aylesbury Estate is currently being redeveloped by the London Borough of Southwark and its chosen development partner Notting Hill Housing Trust. It is to be developed over the period April 2016 - March 2032 in four distinct phases with multiple flexible sub-phases in order to minimise local disruption during the remodelling of the estate. The most recent masterplan foresees the replacement of 2,750 right-to-buy leasehold and social rented residential units through 3950 mixed tenure units – 50% private and 50% affordable units at target rent. The net increase of 1200 housing units should result in an extra uplift of c. 6500 residents with an estimated total population of 14,000 by 2032. This delivery projection is summarised in the table below.

	No. of Units	Construction Timeframe
First Development Site	820	Apr 2016 - Dec 2020
Phase 2	985	May 2016 - Feb 2025
Phase 3	278	Dec 2025 - Jan 2027
Phase 4	1,455	Jun 2025 - Mar 2032
Total	3,538	Apr 2016 - Mar 2032

(Aylesbury Estate, construction phasing)

- 5.11 In addition to the net increase in residential floorspace, a significant amount of flexible commercial floorspace is to be included in the redeveloped Heygate and Aylesbury housing estates.
- 5.12 Between 10,000 to 16,750sqm of flexible commercial space (A1-5 and B1) is allocated in the Heygate Masterplan. The offer at Elephant Park is intended to complement both the existing Walworth Road retail and that coming forward at Elephant and Castle. The intention is to provide an 'anchor' foodstore fronting the Walworth Road, with further larger floorplate units on this frontage. A 'secondary' retail street is intended to provide smaller units for independent retailers while the area around the new public park will be designed to provide a more commercial leisure orientated dining experience.
- 5.13 The developers have committed to providing affordable retail space within the development, in accordance with the Elephant and Castle SPD policy this will represent 10% of the space provided. Whilst plans are still being developed it is expected that much of the space will be provided on the 'secondary' retail street within the development, leaving the Walworth Road frontage for more established retailer activity.

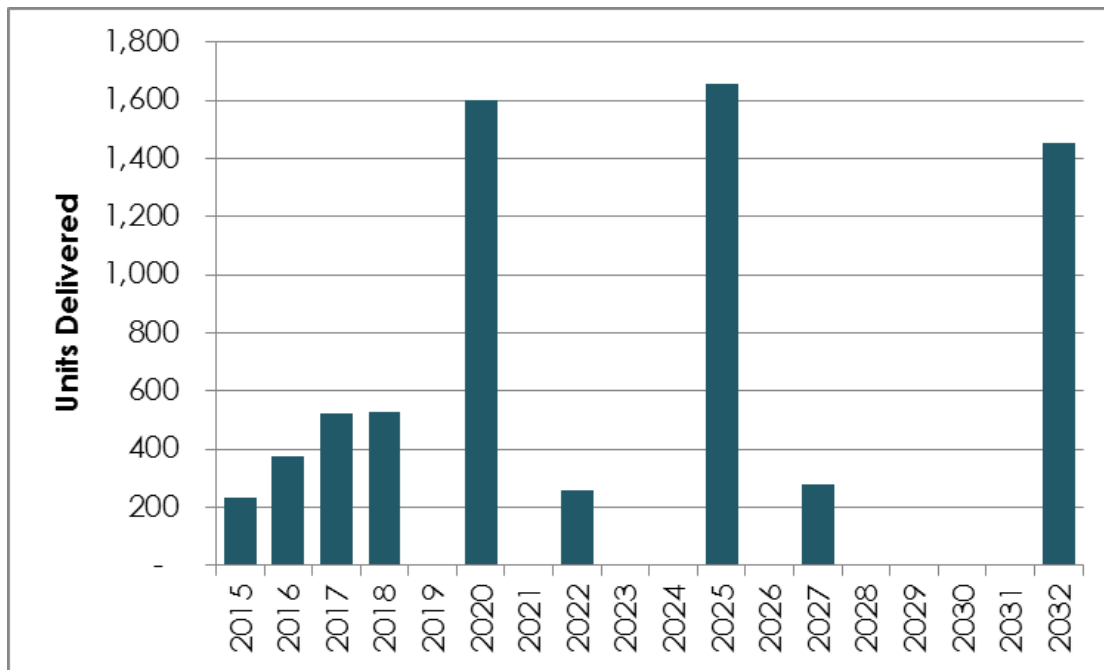
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- 5.14 Although the Aylesbury Estate is located close to the Walworth Road corridor, approximately 16,300 to 16,800sqm of non-residential floorspace is planned within the scheme. Some of which is to be used for local goods and services retail floorspace, however the majority will be for community, health and education uses and workspace. It is unlikely this space will compete directly with the Walworth Road as initial plans are for a 'neighbourhood' centre scale of provision, focussed on meeting the ad hoc needs of residents.
- 5.15 In addition to the large-scale renewal of the Aylesbury and Heygate Estates, a number of developments have been proposed or recently granted along the Walworth Road corridor.
- 5.16 Elephant One is a high-rise residential scheme situated on the northern tip of Walworth Road adjacent to Elephant and Castle mainline station. The development which received planning consent is composed of 373 private tenancy apartments, a 272 bed student residence and commercial space. A newly created 'Market Square' shall form the centrepiece of a complex containing 13 new retail units, 3 restaurants, a 17,000sqft supermarket and a 4 screen cinema.
- 5.17 The scheme is to specifically provide for Londoners in the private rented sector, offering a choice of 1, 2 and 3 year tenancies. It comprises of 3 buildings – 23, 18 and 14 stories respectively - which are to be linked by a podium incorporating retail and restaurant uses. One The Elephant should be completed by 2016, offering a landmark building to anchor the heart of the wider Elephant and Castle Opportunity Area.
- 5.18 As part of the wider regeneration focussed upon the Shopping Centre at the heart of the Elephant and Castle Opportunity Area, in the original vision approximately 65,000sqm of flexible commercial floorspace – 45,000sqm of which shall be for retail uses – is to be added to the existing footprint of the Elephant and Castle Shopping Centre. We understand that this level of space is currently being reviewed and likely to be reduced as the development proposals are solidified. Whatever the final quantum it is clear that a mix of retail, leisure and employment space will be brought forward.
- 5.19 It should be highlighted that any addition of floorspace at Elephant and Castle will most likely complement and not compete with the retail offer on the Walworth Road. It will focus directly on larger comparable goods retail and commercial leisure activity rather than the local convenience goods and services provision speciality of the Walworth Road.
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- 5.20 The development at Elephant and Castle is to especially bolster the leisure and dining offer available at the shopping destination, raising the profile of the area as a Major Town Centre. In line with the Elephant and Castle SPD policy the redevelopment of the shopping centre will deliver 10% of its floorspace as new affordable retail space for local and start up retail businesses.
- 5.21 The Stead Street Carpark located on land bounded by Wadding Street and Stead Street is to be redeveloped. The existing buildings are to be demolished and replaced by a residential-led scheme comprising 140 one, two and three bedroom residential units in new buildings ranging in height between 4 and 7 storeys. A church hall and 117sqm A1 retail unit is also to be included in the development, with associated landscaping, amenity space and cycle/car parking.
- 5.22 A number of other smaller-scale schemes are currently in the planning process and provide a guide to the future activity on the Walworth Road corridor.

Proposal Location	Details of Development
Amelia Street, Land at Robert Dashwood Way, Southwark, SE17	Residential development comprising 164 units (97 private, 33 intermediate, 24 social rented) and 1152sqm of B1 or D1 floorspace with a building height up to 9 storeys
Rear of 221-223 Walworth Road, Southwark, SE17 1RL	The construction of 68 residential units (59 private, 4 social, 5 intermediate) contained within a part 2/3/4 storey development and an adjacent part 4/5/6 storey development
224-236 Walworth Road	Pre-planning: conversion of secondary office block over shops into 84 residential units

(Developments in planning, 2014)

- 5.23 It is unclear when these developments will be delivered, however if we assume the permitted developments are completed by 2017, with those in pre-planning coming forward by 2020 we are able to estimate a delivery trajectory for new housing. At present it is not possible to estimate the delivery of any 'sub-phases' with the Heygate or Aylesbury development, therefore we have assumed all units are released at the end of the construction period. In reality, given the scale of the phases, it is likely some units will be released sooner.



5.24 Assuming a 'standard' household size of 2.4 people this would result in a total population increase of 16,500 residents. This would represent a net uplift of circa 7,000 residents.

5.25 There is potential for Walworth Road to capture any ethnic specialist retailers and services displaced by the redevelopment of the Elephant and Castle Shopping Centre. The strong Latin American local services cluster currently located in the post-war development could potentially relocate in the Walworth Road corridor, owing to its close proximity and existent clusters of South East Asian and Afro-Caribbean retail.

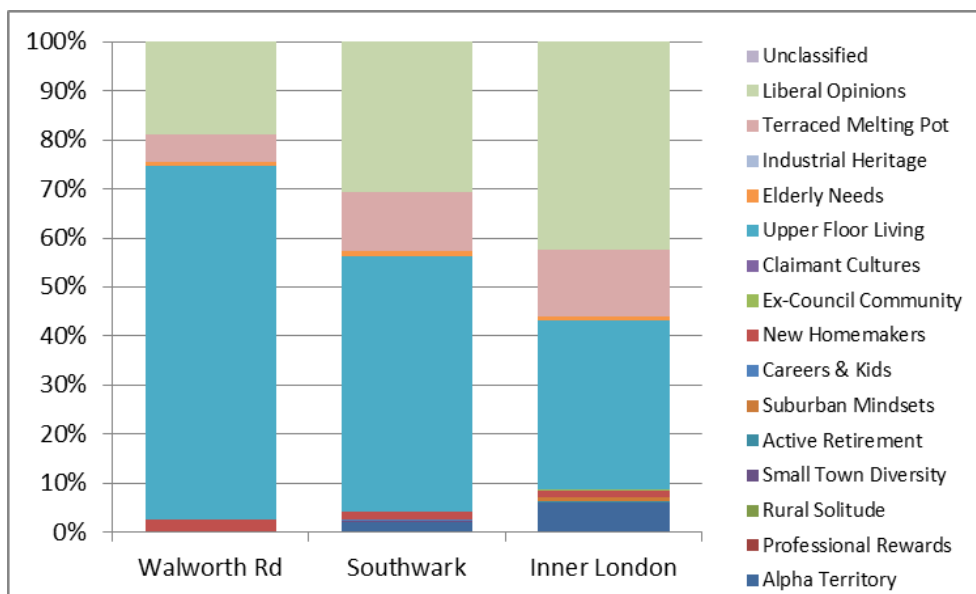
The Catchment will Change as well as Grow

5.26 The scale of change of the local population is only one factor influencing the future of the Walworth Road. As new housing is delivered across a mix of tenures the profile of the catchment is likely to change too.

5.27 The Walworth Road has a large immediate catchment area, with a population of approximately 58,000 living along the corridor, ca. 47,000 of whom are over 18. Over 295,000 live in surrounding area of London Borough of Southwark. At present, over 50% of shoppers using the Walworth Road arrive by foot, demonstrative of the corridor's role as a local centre for local convenience and comparison goods shopping. However, the size of the wider catchment provides scope for expanding the catchment beyond the population within walking distance.

Note: Classifications and typologies utilised within the following analysis are provided directly by Experian and the ONS. These classifications are considered 'industry standards' and commonly used by planning authorities, developers and retailers to better understand the characteristics of their catchment in a particular location. They do not represent any specific aspiration, target or future strategic aim for LB Southwark with respect to the Walworth Road or wider developments within the area.

5.28 Experian Mosaic classification data can be used to analyse the consumer demographic of the catchment area, providing useful insight into the characteristics of dominant consumer groups in the locality, and highlighting underrepresented consumer categories. As the graph below illustrates, a large majority of householders in the immediate and wider catchments of Walworth Road can be grouped under the characteristics of 'Upper Floor Living' and 'Liberal Opinions' with a significant minority categorised as 'Terraced Melting Pot' households.



(Mosaic Consumer Classification – Source: Experian, 2014)

5.29 The dominance of 'Upper Floor Living' households along the Walworth Road and in the surrounding Borough (72% and 52% of total households respectively) highlights the need for the corridor to continue to play its established role as a local retail and leisure hub. The convenience shopping offer should be strengthened, providing a greater and better selection of affordable convenience retail for these households which are characterised by a limited income.

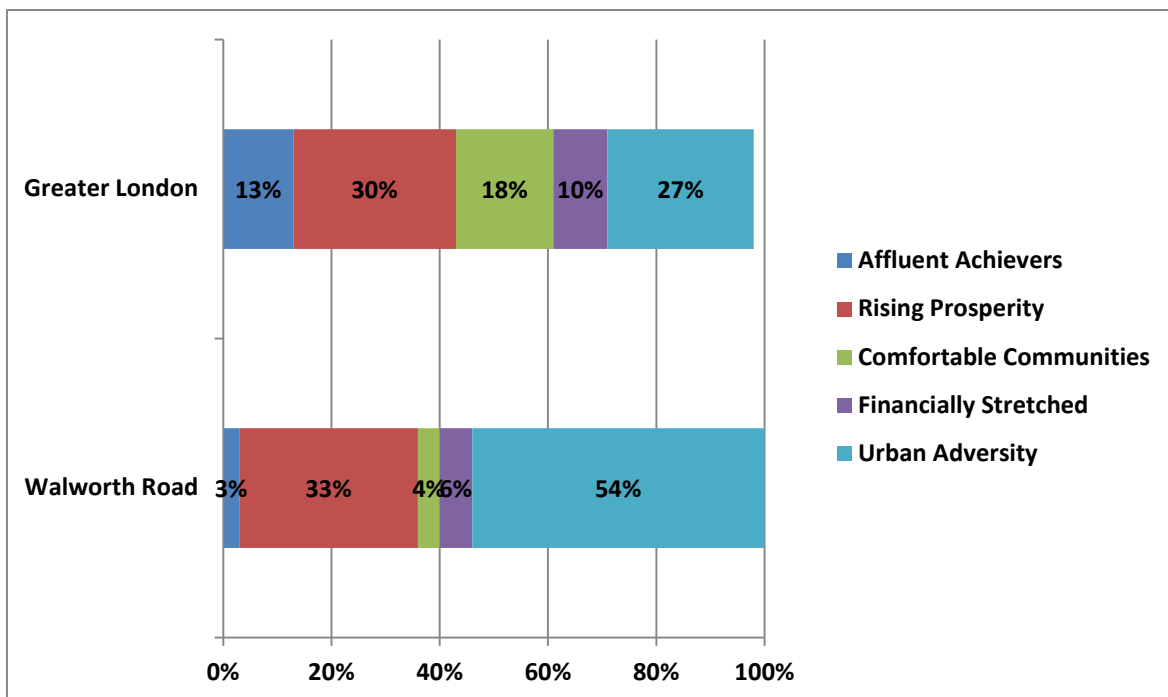
5.30 However, alongside the provision for everyday basic necessities, this consumer group enjoys socialising in bars, restaurants and cinemas which suit their limited budget; the

Walworth Road should provide food and drink outlets to cater for this social demand. The 'Upper Floor Living' category is by no means homogenous. Households may be young and more mature families living in affordable housing managed by a housing association however could equally comprise of young adults sharing an ex-council flat managed by a private investor. Such residents may live in the area out of choice, not out of necessity, in wanting to enjoy a shorter commute into Central London rather than living in a more upmarket property in suburban locations.

- 5.31 However, as the development agenda grows the catchment we would expect the local catchment to more closely resemble the average profile for Inner London. As such we would expect the share of more 'affluent' groups to increase, in particular those classed as "Liberal Opinions".
- 5.32 'Liberal Opinions' households range from students sharing short-term accommodation to young professionals searching for small but smart residential rental properties. The demands and aspirations of this demographic are significantly different to those of 'Upper Floor Living' households; aspiring to cultural and social leisure activities, making the most of urban living. Their consumption patterns differ from the average, spending proportionally more on services than durable goods, generating a demand for retail and leisure uses catering for a café culture and late night entertainment offer. Their educated outlook and cosmopolitan lifestyle generates a demand for differentiated retail which offers ethically sourced, high quality convenience and comparable goods. In this respect, the demand for a broader convenience offer compliments the demands of 'Upper Floor Living' households. However, their use of multi-channel retail (principally online shopping) means that demand for diverse local convenience and café/restaurant/bar uses take precedence over local comparison goods outlets.
- 5.33 In addition to the two dominant groupings, the typical consumer behaviour of 'Terraced Melting Pot' households holds relevance for the Walworth Road. Over 5% of households in the immediate catchment and 12% in the wider Borough can be placed in this category. Their household purchasing power is similar to that of 'Upper Floor Living' households, reflecting a demand for local convenience goods and services.
- 5.34 The significance of local retail businesses, particularly those catering for special ethnic needs and demands is important to this household group; where buying from local businesses is as much of a social activity as a practical economic transaction. The safeguarding and support of the ethnic offer on Walworth Road, in the cases of the Afro-Caribbean and Southeast Asian clusters is important for the servicing of the needs and aspirations of this consumer demographic. Opportunities for socialising in the local area

during leisure time is important to these households in a comparable manner to that of the 'Liberal Opinions' demographic; whereby a significant demand for local cafés, bars and restaurants for leisure and social networking exists.

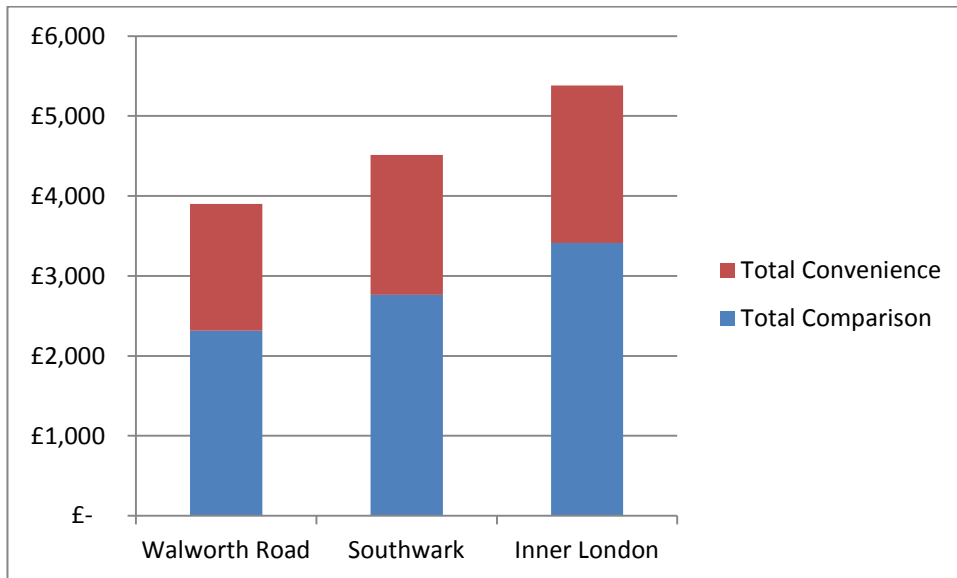
- 5.35 We would anticipate that, moving forward, the offer along the Walworth Road will need to continue to provide locally orientated convenience retail but broaden the offer to ensure the requirements of new demographic groups are met. This will include a shift towards more commercial leisure, mid-priced dining and some 'high street' brands.
- 5.36 The estate renewal programme will create a more socioeconomically mixed catchment area, as the tenure profile of the two major housing estate transitions from 100% social housing towards a balanced stock profile of private, intermediate and affordable housing. The Walworth Road could benefit greatly from increased footfall at the redeveloped Elephant and Castle Shopping Centre owing to an improved retail and leisure mix if it presents itself as a cohesive extension of the Major Town Centre. A larger and more affluent population in the immediate catchment area could increase the viability of multiple convenience food and service providers, which could act as anchors for the Walworth Road. There is scope for building upon the diverse convenience food retail base owing to the increased demand generated by the future local community.
- 5.37 The current catchment area is dominated by the presence of two groups – a considerable population of young professionals and a concentration of semi-skilled/unemployed persons with a low disposable income. ROI conducted a survey of shoppers on the Walworth Road in February 2014 to profile the shopping habits prevalent on Walworth Road.
- 5.38 According to the ACORN Classification System which was used to process the survey findings, 33% of those surveyed on the Walworth Road were grouped under the 'Rising Prosperity' category – one of the two dominating consumer groups present. This type of consumer is typically younger and highly educated – to degree level – and is employed in professional employment. Cultural activities, leisure time and nightlife are integral parts of their lifestyle.
- 5.39 Contrastingly 54% of shoppers present on Walworth Road were categorised as 'Urban Adversity'. This socioeconomic group is typically resident in social or private rented accommodation and is exposed to social and financial hardships. Consumers in this category tend to possess low or no formal qualifications and be active in semi-skilled, low paid employment or be excluded from the labour market; therefore this consumer grouping is characterised by low disposable income.



Consumer Demographics – ACORN Classification (Source: ROI, 2014)

- 5.40 The consumer groupings of 'Rising Prosperity' and 'Urban Adversity' are overrepresented in relation to the socioeconomic profile of Greater London. However, the overrepresentation of 'Rising Prosperity' consumers is noteworthy for the future the retail potential of Walworth Road – as over 50% of shoppers surveyed travelled to the retail area by foot, this catchment area is evidently highly localised.
- 5.41 'Urban Adversity' however is demonstrably an integral grouping in the local community, and has shaped the specialised convenience retail goods and service offer accordingly. This socioeconomic group is likely to decline slightly as the proportion of low cost social housing shall be reduced through mixed tenure residential redevelopment. Nevertheless, the needs and demands of this group will remain a large component of the Walworth Road market.
- 5.42 The presence of these 'lower income' socio economic groups has an impact on the scale and nature of the retail spend locally. The catchment area is characterised by a low level of purchasing power in comparison with the Inner London average, particularly regarding the consumption of comparison goods.
- 5.43 The average Walworth Road resident spent just £2,313 on comparison goods and £1,586 on convenience goods annually, which is considerably lower than the £3,413 and £1,969 that the average Inner London resident spends on comparison and convenience goods

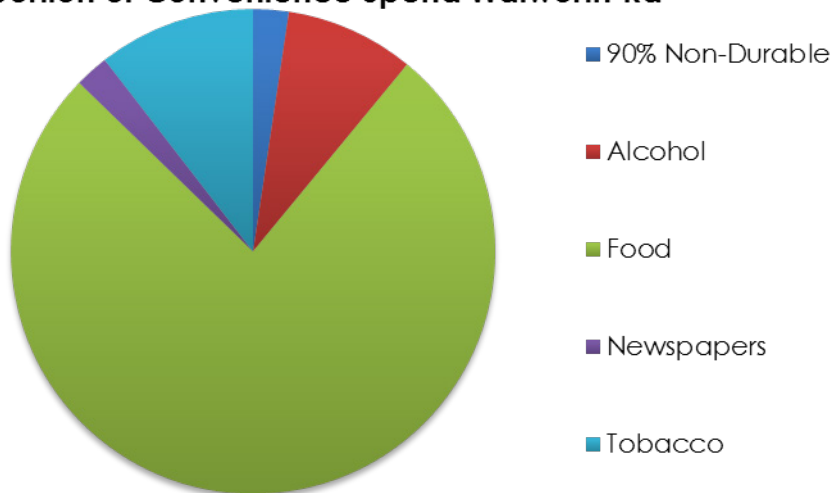
respectively. However, levels of average per capita spend is higher in the remainder of Southwark Borough, beyond the immediate Walworth Road catchment.



(Average annual household spend – Source: Experian, 2014)

5.44 The way this spend is distributed also has an impact on the nature of retail within the area, as shown below a considerable proportion of local spend is used to buy food, followed by a high proportion on alcohol and tobacco products.

Proportion of Convenience Spend Walworth Rd



5.45 We would usually anticipate that as the socio-economic groups diversify this spending would significantly change, both in terms of the actual value of spend, but also its utilisation. Again it would be reasonable to assume that the local trend would move towards that of the Inner London average, increasing consumer spending by over £1,500

per head of population, taken across the additional 7,000 residents in the area this would result in a net increase in potential spend of £10.5mn. Clearly not all of this will be used locally, but even capturing a small share would greatly influence the Walworth Road's retail economy.

- 5.46 New residential development is likely to attract increased numbers of professionals and more affluent young families alongside the existing population. The consumer orientation of these more affluent groups is directed towards leisure and dining opportunities presenting opportunities for the largely convenience-based retail and servicing present on Walworth Road to be accompanied by leisure-based development. The future availability of larger retail units suitable for leisure uses could provide an opportunity to anchor the Walworth Road by catering for the elevated leisure needs and demands of its changing local community.

Consumer habits are changing

- 5.47 As the catchment for the Walworth Road is evolving so is the way they shop significantly changing the retail environment and therefore the role the Walworth Road will play in meeting future requirements.
- 5.48 The role and function of high streets has constantly evolved since their origins as the key trading hub on routes to and from the City of London. The traditional role of high streets as the principal location for shopping, whilst changing in form and nature, had remained consistent until the end of the twentieth century when both retailer and shopper habits began to change.
- 5.49 Major changes in how the retail sector functions are having considerable impacts on the high street offers. Increasing competition between high street and online retailers is driving the sector to seek increasing efficiencies to be able to maximise profits whilst still offering competitive prices.
- 5.50 For the major, multiple outlet retailers ("multiples") this has resulted in a drive for greater sales efficiencies, mainly by increasing the value of sales per square foot of retail floorspace. The multiples' strategy has been to focus on retaining highly efficient stores with large open floorplates located within a smaller number of major town centre and shopping centre locations.
- 5.51 This approach has been replicated across the range of major high street retailers effectively reinforcing the trend and increasing the market dominance and share of the

- major centre. It has also presented a dual challenge for smaller, historic high streets which a. cannot provide the scale of units major retailers require and b. do not have sufficient footfall to attract major retailers to the units available (partly because shoppers are now able to travel more easily to larger centres).
- 5.52 For the Walworth Road there has always been 'local' competition in the form of the Elephant and Castle Shopping Centre and also from the major comparison retail offer of the West End and major centres in South London such as Lewisham. This has always driven the character of the Walworth Road, which has remained the focus for more locally orientated, local resident owned independent businesses.
- 5.53 As such, the Walworth Road has been somewhat protected from the 'flight' of large multiples to larger retail centres that has affected other London high streets. However, as the economy recovers and retail-led development schemes emerge there are potential impacts for the Walworth Road as shoppers seek a mix of multiples and independent retailers to meet their needs. Major new centres are responding to this challenge, providing a mix of large and small units to attract independent retailers and establish a 'character' that sets it apart from traditional mall developments.
- 5.54 This desire to create character reflects a significant change in shopper behaviour. Until relatively recently shopping had been viewed as a 'necessity' however as disposable incomes have risen and a wider range of shops opened it has become a leisure and recreational activity. Major shopping centres and town centres have responded to this change by providing a much broader range of services and amenities to complement the core retail offer such as bars, restaurants and cinemas.
- 5.55 Places where this character is perhaps more authentic are still suffering and it will be vital for the Walworth Road to provide a high quality, highly accessible and varied offer in order to retain and grow its catchment. Without this the Road is vulnerable to losing footfall and entering a decline that will affect its viability as a functioning high street.
- 5.56 Even one of the traditional unique selling points of the Walworth Road – East Street Market – has seen its role diminished considerably since the turn of the century. The rise of the discount retail sector through stores as varied as Primark, The 99p Store, Wilkinson's etc. has seen the traditional market 'niche' become crowded, with similar goods offered at similar (if not cheaper) prices within more pleasant shopping environments, the ability to try clothes on, multiple payment methods and clear returns policies and guarantees.

- 5.57 East Street Market has survived better than a large number of other London street markets, however it has contracted considerably and the range of goods on sale has reduced. However, it is still well used and able to meet local (and even pan-south London) demands for specialist food goods. More importantly the traders themselves have recognised the need to continue to evolve to ensure it remains a viable market, this is not an unusual situation for the traders who, as entrepreneurs are quick to recognise and exploit any new opportunities.
- 5.58 The future of the Walworth Road will, therefore, continue to change. However it is likely to continue to be focussed on providing 'top up' shopping, specialist retail opportunities and leisure, community and service provision for local residents. However, to retain and grow this role the offer will need to change over time, retaining the key independent character but working with these existing strong foundations to enhance the attractiveness of the Road to new and existing residents as leisure and retail destination.

The Business Perspective

- 5.59 In general the business base within the Walworth Road is likely to remain relatively stable. The results of the business survey suggest that over three quarters of current businesses plan to remain in the area in the next two to three years.
- 5.60 Of those that are planning to leave the area the key reasons stated relate to business trading conditions and costs with an equal proportion (5 businesses each) stating a lack of footfall or a wish to reduce rates.
- 5.61 Other reasons for planning to move to a different area were to do with trading levels, with the company feeling they are performing poorly because of the location; being closer to a 'better quality' customer base; or to an area with a greater range of businesses.
- 5.62 Encouragingly a large number of businesses surveyed were positive about the future prospects for their business performance stating that they expected turnover and profitability to grow (37% and 28% of respondents respectively) in the next 12 months.
- 5.63 The key drivers for this growth were felt to be a general improvement in the level of trade which they believe will continue over the next twelve months, this was reinforced by 20% of respondents who felt that turnover would improve as a result of increasing footfall in the area.
- 5.64 This expectation for locally driven growth was reflected in the majority of responses to the question of what impact businesses felt regeneration at Elephant Park and the Aylesbury

Estate would have. 55% felt that the impact would be positive, 78% of these respondents felt that the regeneration of these areas would bring additional footfall to the Walworth Road, with a further 22% expecting it to improve the area's overall image.

- 5.65 A number of businesses were less positive about their future prospects with 12% feeling turnover would reduce and 14% feeling they would become less profitable. In general this negative sentiment was a result of decreasing footfall, increased competition and an expectation that the economy will remain weak.
- 5.66 Similarly there were concerns regarding the impact of the Elephant Park and Aylesbury Estate redevelopment. 10% of respondents felt they would have a negative impact on their business, either by drawing trade away from the area or increasing pressure on parking.
- 5.67 It is worth noting that 30% of businesses did not know what impact the schemes would have on their future activity.

Changing Geography of Employment Activity

- 5.68 As the core economic functions of the Central City expand and the CAZ grows physically it creates a tension between the demand for and supply of land to service its functions. Increased activity requires a greater level of servicing however it also 'squeezes out' these very activities as competition for land intensifies.
- 5.69 The success of key economic hubs in creating attractive places in traditionally peripheral parts of Zone 1 has created a particular tension between high value residential development (which is seeking to 'cash in' on the value uplift in these locations) and the uses that traditional occupy them. This has become a particular challenge for service, creative and arts based activities which require relatively cheap space but also good connections.
- 5.70 This impact is happening across the traditional service locations at the fringes of the Central City particularly in locations of major regeneration projects in traditional servicing locations such as the area north of King's Cross, Nine Elms and Battersea and the Lower Lea Valley alongside 'creative clusters' in Old Street, Hackney and even Deptford.
- 5.71 These dynamics are creating a new pattern of demand for workspaces within Zone 2 in particular, where property is cheaper but still provides relatively quick access to the Central City. This is a major opportunity for locations which have an existing base of

economic activity, a stock of spaces that meet these occupier demands and a wider context and character that is attractive to key sectors.

- 5.72 Certain businesses can only relocate so far from their core markets before operation becomes uneconomic or they lose the access to wider drivers of their activity such as universities, galleries or leisure assets. Therefore locations such as the Walworth Road offer a new 'prime' location for relocating businesses given its accessibility, existing business mix, rich character and workspaces.
- 5.73 Other areas of Southwark are experiencing new demand from these users in existing industrial sites, however even these locations (particularly to the north of the borough) are now under increasing development and rent pressure. It may not be long before activities are again seeking relocation opportunities.
- 5.74 Redevelopment is not the only pressure, in many areas traditional stock is being 'up-valued', again displacing traditional occupiers. A large number of railway arches across south London are now experiencing this, with Vauxhall, London Bridge and Peckham all experiencing a shift in arch occupancy from traditional light industrial activity to higher value retail, food and leisure activity.
- 5.75 Again Walworth Road is well positioned to benefit from this phenomenon as it has a significant stock of arches which could be occupied. Given the proximity to the Walworth Road the opportunity to introduce higher value retail and leisure activities into these arches is likely to be limited. However they do offer an opportunity to provide a parallel 'employment' street alongside the high street function of the Walworth Road.

6. Responding to Challenges & Opportunities

6.1 The Walworth Road finds itself at the centre of a rapidly changing world, with local, national and international factors all shaping how it is used today and how it will be in the future. For the area to remain vibrant and successful it will need to positively respond to these factors and evolve its offer to meet changing requirements.

6.2 There are particular challenges which will need active participation and intervention from a range of partners to ensure the Walworth Road is best positioned to benefit from its changing context:

- There are a number of new or enhanced retail schemes which, whilst not directly mirroring the Walworth Road offer will create an environment and mix of retailers that could draw footfall away from the Walworth Road. The presence of larger multiple retailers and dining will be a particular competitive challenge for the Walworth Road;
- The Walworth Road has an uneven spread of key footfall drivers, with major retailers tending to be concentrated within the 'High Street' section and Elephant and Castle station drawing people to the north. However, the southern end of Walworth Road lacks key attractors of footfall, with the low quality retail offer reflecting this. Future improvement will be needed to ensure the Walworth Road continues to be the destination of choice for residents at the Aylesbury Estate;
- There is a limited range and choice of built stock, with the majority of units providing small, narrow floorplates. This provides limited scope for attracting new occupiers and uses as well as restricting opportunities for existing businesses to grow and expand within the area;
- Areas of the Walworth Road public realm are strong, particularly where recent investment has been made, however beyond these locations the quality is mixed. Particular weaknesses are along East Street and also on the east-west links to and from the Walworth Road, such as Amelia Street, MacLeod Street and Westmoreland Road. To enable the Walworth Road to compete with new, or regenerated, retail offers and draw people through from the surrounding estates the environment and legibility on these 'feeder' streets should be enhanced;
- Currently the Walworth Road mix is focussed on traditional 'High Street' retail activity, with limited leisure provision. This potentially limits the consumer base for the Road and also decreases the potential for any linked trade resulting from leisure users. As

the population in the area grows and changes there will be increased demand for a range of leisure activities, which the Walworth Road could accommodate; and

- Successful growth and development along and around the Walworth Road will raise the quality and scale of the local market and may, over time, have a positive impact on demand for space on the Walworth Road. Increased demand for premises could present a risk of losing locally relevant retail as they are 'priced out' of space by larger retailers. The Walworth Road will need to evolve in a way which 'protects' these locally relevant businesses whilst also introducing new activity.

6.3 Responding to change and evolving is not a new phenomenon for the Walworth Road, which has always adapted and changed to serve its customer base, however the scale and range of influences today may provide its greatest challenge and, also, its greatest opportunity.

6.4 All partners and stakeholders actively involved with the Walworth Road will need to work together to support this evolution, helping to raise the quality, attractiveness and usability of the area for a range of new users.

6.5 However, this is not to suggest that fundamentally there are major failings within the Walworth Road and that its condition today needs to be comprehensively changed. Indeed, the converse is true, the Walworth Road has the foundations for continued and enhanced success in place and working with these will provide the bedrock for authentic and locally relevant growth.

6.6 In developing a Strategy to help move the Walworth Road forward there are key assets that intervention and support should be organised around:

- A strong independent retailer base that is focussed on meeting local needs, this includes a varied food offer which draws people to the Road and serves diverse requirements;
- Longstanding occupiers that have a real investment in the area, many of which have been based on the Road since start-up and have no plans to move elsewhere;
- Improvements to parts of the public realm, which have significantly enhanced the feel and usability of space, matching the quality of major site development;
- Opportunities to create new spaces and development both within the major development sites but also with sensitive 'in-fill' activity and bringing back into active use important assets'

- A growing cluster of small businesses located within and alongside the Walworth Road;
- A broadening portfolio of workspaces, including interim uses on major sites, railway arches and refurbished spaces that attract a broad range of activity and can provide a base for growing new demand for commercial space delivered on major sites; and
- An increasingly organised business and community base that are positive about the area's future and want to engage and shape the future of the Walworth Road.

7. Learning from Others

Brixton Village

- 7.1 Brixton is an inner city district located within London Borough of Lambeth, and is identified as one of the 35 major centres in Greater London in the London Plan (2011). The area has an eclectic and varied past as a prominent centre for the Afro-Caribbean community of London. It became home to the first wave of post-war African and Caribbean migrants epitomised by the Empire Windrush, however became an area of concentrated social exclusion – of spiralling poverty, poor quality housing and general urban decay. The inherent inner city problems of the area would culminate in the 1981 Brixton race riots.
- 7.2 Brixton does however possess an attractive urban fabric characteristic of inner city areas in London – with particular landmark sites such as the Granville Arcade and Market Row, which had been neglected as a consequent of the urban exodus of the 1980s. The Brixton City Challenge initiative of the 1990s capitalised upon these local assets, which were to be demolished and replaced by a residential-led property development. London Borough of Lambeth and its partners fundamentally recognised the historic significance of the market as the commercial and social heart of the post-war Afro-Caribbean community, and instead used City Challenge funding to leverage the redevelopment of the market.
- 7.3 The landowner London and Associated Properties Ltd brought in the Spacemakers Agency as business and marketing support, who carefully steered the mix of sociable and commercial functions. The strength of the strategy lay in the flexible approach to letting in the early stages of the market's development – by attracting new traders and experimental pop-up businesses through heavily reduced rents for the less popular units. This created the critical mass and encouraged the unique mix of businesses which have transformed the market into the home of more than 25 restaurants, clothing and gift shops, cafés and bars – contributing to local placemaking.
- 7.4 Concentrating upon the landmark placemaking scheme has catalysed the regeneration of the surrounding area and is demonstrative of a scheme which celebrates the unique cultural and social history of an area, in contrast to an archetypal homogenous retail-led regeneration scheme.
- 7.5 It should be noted that as the Brixton area has become more successful there have been some adverse impacts on a number of the original 'innovator' businesses. As demand for space has grown and higher value retailers moved into the area there has been a knock

on impact on rents, pricing out some of the operators that helped create the character in the first place.

- 7.6 Anecdotally it has been reported that there has been a 'chain reaction' of business movement and displacement, with some businesses who once traded from Borough Market but were 'priced out' moving to Brixton, who in turn have 'priced out' others in this location.

(Brixton Market – Source: English Heritage, 2013)



N1 Centre, Islington

- 7.7 The N1 Centre in Islington is an example of a retail-led regeneration scheme which is integrated into the existing historic retail core, as such it provides a number of parallels with the Walworth Road and its future relationship with the Elephant and Castle/Heygate regeneration. London Borough of Islington and its partner developer Centros Miller successfully delivered a retail area which bolsters the town centre in the face of the



challenges affecting UK high streets; the growth of internet shopping, economic downturn and the scars of the civil unrest during the summer of 2010.

- 7.8 Alongside a skilful mix of retail, leisure and evening uses, the N1 Centre is characterised by internal streets which improve the permeability and quality of public space in the town centre. It provides a contemporary addition to The Angel and adds to the retail and entertainment offer – bringing a Vue cinema and multiples such as H&M to the town centre. The centre does not compete with the existing retail core; it completes it, by seamlessly extending the retail frontage of the pedestrianized precinct and linking the main shopping area with the Chapel Market, maximising an existing local asset.
- 7.9 The N1 Centre provides a case study which demonstrates how larger units for national chain retailers and leisure uses can supplement an existing town centre retail offer, and the importance of creating a cohesive urban fabric which draws people from core retail areas towards previously neglected corners of town centres.

Lessons Learned

- 7.10 **Build on local assets such as markets:** Brixton Market based scheme on an adapted version of the existing market by increasing its food and drink establishment offer, whilst the N1 Centre aimed to draw footfall from pedestrian precinct through the Centre towards the existing Chapel Market. Both schemes focussed upon improving and continuing the distinctive local streetscape to provide a retail environment
- 7.11 **Flexible and agile property management:** landowner of Brixton Market offered shops for up to three months rent-free to creative/community groups and retail start-ups to incubate potential successes, N1 Centre continued to carefully select new tenants to fill gaps left in aftermath of 2008 financial crisis – e.g. Woolworths into Waitrose
- 7.12 **Anchor retail with food and drink establishments:** both schemes appreciated the role of restaurants, cafés and bars as footfall generators which increased the length of time spent by visitors
- 7.13 **Maximise opportunities of the ‘experience economy’:** Brixton Market offers a unique architectural backdrop to an eclectic mix of independent specialist retailers and food/drink establishments – generating ‘buzz’ and drawing in visitors from a London-wide catchment, the N1 Centre organises street entertainment and encourages evening usage to create a 24-hour atmosphere
- 7.14 **Be aware of local retail distinctiveness:** the N1 Centre aimed to introduce multiples which previously had no presence at The Angel which bolstered the core retail area’s offer – a holistic approach considering the broader context. However both schemes aimed to

safeguard and develop the existing independent sector to avoid a homogenous 'clone town' offer – use multiples and independents as complementary not competitive elements

- 7.15 **Consider local needs and demands:** the N1 Centre retail and leisure mix is carefully steered by extensive market research into local demands and needs as well as those of the broader catchment area – it should service as a local centre as well as a visitor 'destination'.
- 7.16 **A catalytic approach is not without risks:** success will create additional demand which, with limited space and no direct control over commercial property, can result in increased rents. If businesses are not able to grow and adapt, or are simply businesses that operate with low margins, there is a risk they could end up being priced out of the location. This could challenge the long term sustainability of a truly locally authentic offer.

8. Success Factors

- 8.1 Walworth Road is a classic South London High Street. Many of the characteristics which supported such high streets are changing. Successful high streets now reflect the following factors.
- 8.2 A successful London High Street is characterised by a good level of occupancy with low levels of vacancy or underused space. The occupancy structure comprises businesses which complement and relate to each other, creating a coherent offer which attracts the local community and visitors.
- 8.3 A community of local businesses which is networked and aware of opportunities and weaknesses in the area is highly useful. The business base works together towards achieving common goals.
- 8.4 High Streets include a balance of independent and multiple retailers which offer high quality and locally relevant goods and services, particularly food retailers such as metro-style supermarkets.
- 8.5 A locally relevant and affordable offer that focuses upon the needs and aspirations of the immediate catchment bolsters the central role of the High Street in daily life, ranging from the provision of convenience food retail to café and restaurant uses.
- 8.6 Daily needs and demands should be easily fulfilled by the High Street, providing for top-up grocery shopping and places to casually socialise with family and friends.
- 8.7 A successful London High Street contains a leisure, cultural and entertainment offer, to anchor the High Street in the era of multichannel shopping and the rise of the 'experience economy' – informal dining, café culture and evening activities.
- 8.8 The creation of a retail and leisure offer which can distinguish it from other high streets is necessary to appeal to the wider catchment – this can be based in a distinctive ethnic shopping or dining offer, or an anchor entertainment or cultural facility.
- 8.9 Community uses play a vital role; the High Street is more than a place of consumption, it should be the focal point of community life. Healthcare services can provide for the needs of the local residential population, whilst places of worship and community centres provide formal social spaces for organised and informal activities.

- 8.10 The streetscape of the High Street should be of a high quality and create a cohesive, attractive environment in which retail and leisure uses can unfold. Public space provides the backdrop for everyday activities and provides a visual anchor for local identity. High quality public realm should provide a place for informal socialising, causing visitors to linger and enjoy their time spent on the High Street.

9. A Vision for the Walworth Road

- 9.1 In light of the baseline information and analysis outlined in the previous sections there is no doubting that the Walworth Road presents a vibrant and diverse offer, however there is an identifiable vulnerability for the area to a shifting context both locally and in terms of strategic trends.
- 9.2 However, despite considerable challenges to the viability of a range of businesses the vitality of the road has been retained, providing an important basis for future success. Having undertaken considerable analysis, engagement and research we have identified the following principles that should provide the foundation of future intervention in the Walworth Road area.
- 9.3 They underpin a vision for the Walworth Road that supports an evolution of the physical, social and economic characteristics of the area to ensure it continues to provide a high quality locally distinctive and relevant offer to the broad range of people, groups and communities that call it home.
- 9.4 By working with the existing assets to raise their quality, enhancing the quality of the public realm, improving the permeability of the surrounding areas, integrating new developments and broadening the economic and community offer the Walworth Road will remain a valuable asset for residents. Following these principles across all investments will retain and grow footfall, providing the opportunity for existing and new businesses to thrive.
- 9.5 The **character** of the street should be retained and enhanced by building upon the existing mixed retail offer of local convenience, some larger multiples and the ethnic clusters serving the Latin American, Southeast Asian and Afro-Caribbean communities. Developments should contribute to bolstering the primary service role that the street plays in servicing the needs of the local residential population.
- 9.6 The **distinctiveness** of the streetscape and retail offer should be celebrated. A focus upon supporting the independent offer by means of engaging with local business networks to gauge needs and co-develop development strategies. In addition, the unique opportunity to develop a complementary retail and services offer in the railway arches should be maximised.

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- 9.7 Support, curate and evolve the role of the **East Street Market**, ensuring a quality offer which is relevant to the local community, enhancing the quality of the market environment and the viability of trader businesses.
- 9.8 Enhance the levels of footfall by taking advantage of the opportunities that the 'experience economy' offers; creating space for footfall generators such as **restaurants, cafés and bars**. A greater number of food/drink and leisure uses should cater for the needs and demands of a changing catchment area, in the context of widespread redevelopment to the north of the Walworth Road.
- 9.9 New **anchor retail and leisure** uses should be carefully introduced in order to boost and sustain footfall along the entirety of the Walworth Road. Recent trends in the development of metro-style supermarkets, informal dining outlets, gyms and entertainment venues should be reflected in the future retail and leisure offer.
- 9.10 Maximise the opportunities presented by the diversifying economic base to support the **evolution of new and existing businesses**. The reuse, renovation or conversion of out-dated and redundant commercial units (including arches) should contribute towards creating new employment spaces within the existing urban fabric, providing new attractive floorplates for businesses. The north of the area should be a particular focus, drawing on the expanding creative business mix and the connectivity provided by Elephant and Castle station. Key in this area will be evolving the use of the existing railway arches/viaduct as good quality business space to attract businesses displaced from other locations.
- 9.11 The quality of the public realm should be improved in order to create a **cohesive, high quality streetscape** which draws visitors from the Elephant & Castle regeneration area to the north down to the Camberwell Road. The East Street frontage should be targeted in particular in order to bolster the success of the East Street Market and adjacent permanent retail units.
- 9.12 The connectivity of the Walworth Road should be improved with regards to the **pedestrian and cycle routes through the area**, thereby improving linkages with large and small-scale new developments towards the northern end of the street. This should seek to link more clearly communities to the east and west with the Walworth Road and its growing network of green spaces.
- 9.13 Legibility of links to and from the Walworth Road should be enhanced, improving the environment between the Road and the rail line, including **enhancing the viaducts**
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themselves to make them more attractive gateways to the area. Key gateways where feeder roads join the Walworth Road should also be improved and signage made clearer.

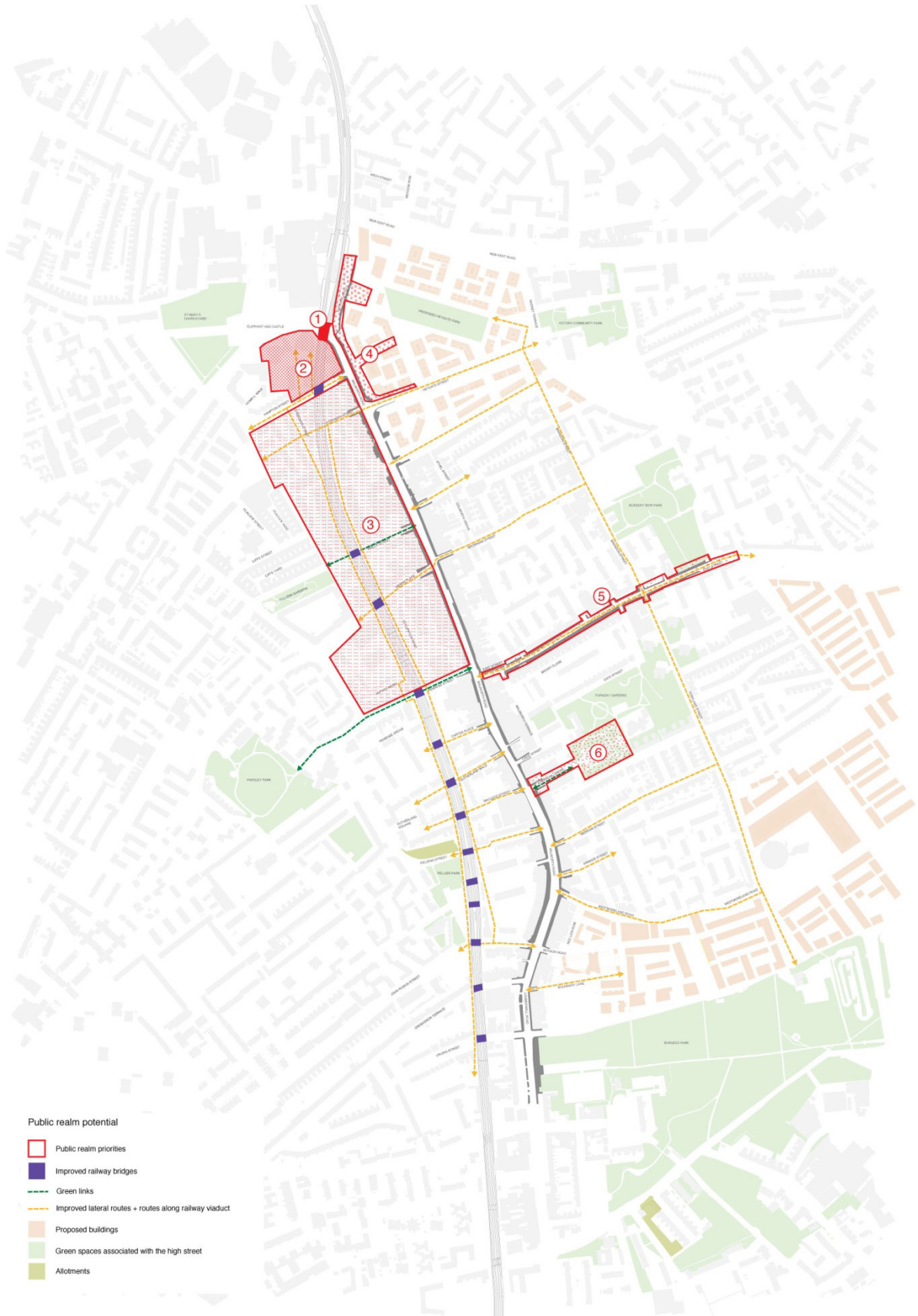
- 9.14 It is critical **the quality of the Elephant Road viaduct area is raised** to ensure it acts as an excellent 'front door' to the Walworth Road and continues to support the vibrant business cluster it accommodates.
- 9.15 A coordinated approach should be developed to 'polish the jewels' of the Walworth Road, identifying, highlighting and encouraging **investment in heritage assets** creating a network of high quality buildings.

A deep high street with improved links and legibility



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- 9.16 Walworth Road runs north to south with the railway viaduct alongside it to the west and Portland Street to the east. The railway viaduct has an unusual number of railway bridges, providing good permeability and access to Walworth Road for communities to the west. Parallel Portland Street provides a calm and attractive environment to the east, connecting existing and new communities (within the Aylesbury Estate) to East Street Market and the Heygate and Elephant and Castle (shopping and public transport).
- 9.17 To strengthen Walworth Road it is essential that the high street is well connected to its hinterland and that residents feel drawn to the high street. The notion of a deep high street, rich on commercial and community uses, varied, attractive and easy to get to is important.
- 9.18 A sense of depth and variety should be created by considering the railway arches and yards as part of the high street environment. This would require careful redevelopment of the railway arches to provide a commercial environment that would complement the traditional high street (in principle similar to the relationship between Brixton Road and the fine grained street and market spaces to the east of this high street).
- 9.19 Improving the lateral routes to highlight connections is part of this; with the redevelopment of the Heygate it will become particularly important to draw people living around Portland Street onto the high street to avoid whole communities bypassing the high street when moving to and from the station at Elephant and Castle.
- 9.20 Improvements to lateral routes could include greening (trees as well as small scale planting, use of mosses etc), lighting the railway arches and directional signage with a place specific focus on interpretation of the area.
- 9.21 There are already emerging proposals by the council and local residents to improve green links across Walworth Road to provide a green space network, the 'low line' – a route alongside the railway viaduct, and strengthening of routes to and from key places (such as the space in front of St Peter's Church). These proposals should be brought together into a single strategy for the area as a whole.

Placemaking



- 9.22 In addition to improvements to green links, lateral routes and the railway bridges as described above key priorities for placemaking include:

Shopfronts

- 9.23 At the moment shopfronts and signage along the road are generally of poor quality in terms of design and maintenance. This could be improved through development of design guidance specific to Walworth Road (including for uppers) as well as council led shopfront / building frontage projects as seen on other high streets across London.

Street Quality

- 9.24 The street was improved a few years ago and the principles applied could be evaluated as a basis for future improvements, including extending the improvements to include the entire high street

- 1) The railway bridge across Walworth Road; the face of the road to Elephant and Castle. At the moment this is not supporting an image of an attractive high street beyond. Interpretation signage and lighting as well as a high quality treatment to the ground could create a strong and attractive entrance to Walworth Road.
- 2) A public realm project should be developed, proactively for the west side of the road to reflect but not replicate the redevelopment of the Heygate east of the road. The environment around the northern railway arches could support a creative, open environment for creative businesses as well as cafés, restaurants and shops. Close collaboration with existing and new landowners and developers would be key to bringing this area forward. It has an extraordinary location, close to public transport with attractive spaces, Iliffe Yard and the creative environment around the Pullens Estate nearby.
- 3) A public realm focus for this area could include long term strategies for a high quality environment, a close relationship between ground floor uses and outside spaces and a transformation of the railway arches to connect rather than separate. It could also include shorter-term improvements of a more temporal nature, to begin to explore these opportunities with the local community and landowners / developers.
- 4) The Walworth Road and Elephant Road frontage of the new development on the site of the Heygate should be designed proactively as part of the Walworth Road environs

to tie in with streets and spaces west of the road as well as the environment around the railway arches.

- 5) The market could be improved to support an integrated retail environment where stalls better complement the shops. Variety of the offer could be encouraged through management of the market. This would potentially begin to draw a wider audience.

Opportunities for the layout of the stalls should be explored to avoid bottlenecks and to ensure that fronts are facing fronts (including shop fronts).

An integrated solution where all stalls were provided and erected in a managed and coherent way to a fixed layout with ground sockets could be explored. This would provide a sense of care, ease management and raise quality overall.

Alongside this, opportunities for integrating social spaces into the market environment should be explored. In addition to pocket spaces within the market, this could include making more of spaces 'hanging off' East Street, improving yards and buildings around the street, and making adjustments to key junctions, the frontage of Nursery Row Park and the environment around the storage facilities.

- 6) At the moment the relationship between the high street, the St Peter's Church, designed by Sir John Soane, and Faraday Gardens is weak and the space in front of could be improved as identified locally. Key objectives would need to be established to ensure that the space remained functional for local residents and the church, but a shared surface able to be closed for special event could be considered. This could provide a much needed hard landscaped public spaces towards the southern end of Walworth Road.

Development Potential

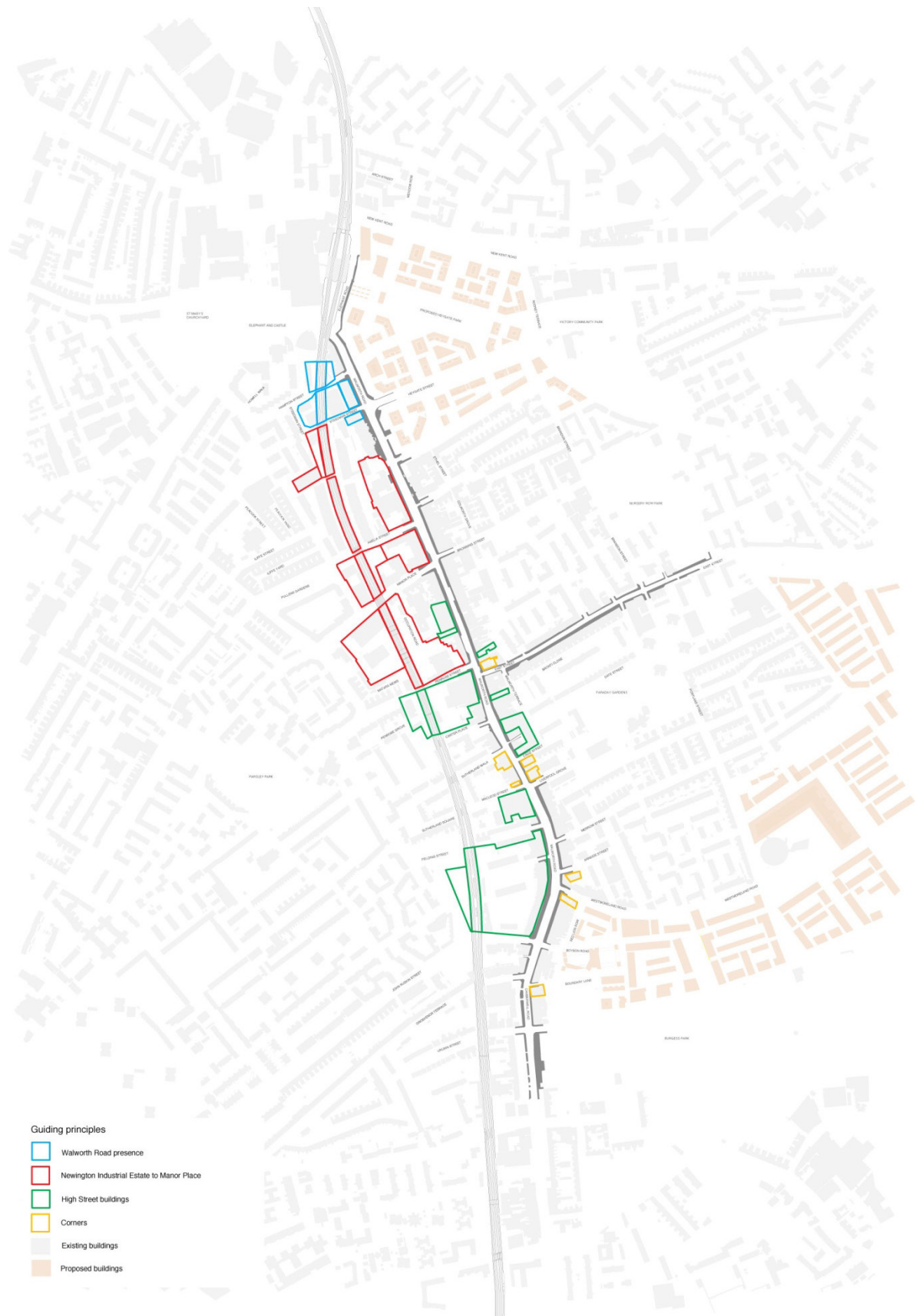


9.26 Additional sites have been identified to support placemaking. To deliver a deep high street taking advantage of the railway arches that run west of Walworth Road, the arches should be improved alongside adjacent sites. Proactive strategic collaboration between the council, Network Rail and other landowners/ developers will be necessary to achieve improvements west of Walworth Road that both deliver commercial uses, additional homes and a high quality piece of city.

10. Towards a Strategy

- 10.1 Having considered the current 'conditions' impacting the Walworth Road and identified the potential nature and impacts of change this section sets out the recommendations for a headline intervention strategy and key actions.
- 10.2 The focus of the headline interventions is to create the conditions for the Walworth Road to continue to be a viable and vibrant high street. It is not the purpose of the strategy to direct a fundamental change in the character of the Road by prioritising particular types of development or retail activity at the expense of the existing mix.
- 10.3 The focus is to provide the 'backdrop' against which all businesses have the opportunity to succeed, creating a place that maximises its relationship to the surrounding communities in order to ensure footfall is drawn to the Walworth Road rather than lost to other locations.
- 10.4 It is for the businesses themselves to decide how they wish to exploit these opportunities; the strategy should not force growth upon them but allow existing and new businesses to benefit from the changes that are occurring.

High Quality Design



Walworth Road Presence

- 10.5 The potential role of these sites is to increase the presence of Walworth Road at Elephant and Castle (alongside the Heygate Estate redevelopment).
- 10.6 Careful consideration should be given to ground floor uses and the public realm to support potential for fine grained active ground floor uses within the Strata development filtering through to Walworth Road.
- 10.7 Railway arches should be integrated into any development to strengthen the successful use of these along Elephant Road and establish the railway viaduct as a positive landmark within the area. The arches should be double fronted and penetrable, addressing both sides of the viaduct.
- 10.8 A potential redevelopment of the corner of Steedman Street and Walworth Road should form part of this place specific collection of spaces and buildings, announcing their presence on Walworth Road as a counterpoint to the large scale Heygate Estate redevelopment.
- 10.9 Building should be carefully detailed, with penetrable ground floor uses at grade. Yards and spaces should embrace the post industrial nature of the place in terms of materials and texture.
- 10.10 Post industrial buildings with opportunity for reworking to accommodate studio spaces / offices or residential uses should be kept and integrated into new developments.

Newington Industrial Estate to Manor Place

- 10.11 The potential for these sites is to create a rich situation with a mix of ground floor uses that build on the successful Iliffe Yard.
- 10.12 Careful consideration should be given to the creation of small scale public spaces, yards and alleys supported by well lit, flexible work / commercial spaces.
- 10.13 Recent developments and railway arches need to be carefully improved alongside new development to achieve an attractive mix of studios, workshops, A1 and A3 uses. Improvements to the public realm around recent developments will be key to achieving this.
- 10.14 Buildings should be carefully detailed, with penetrable ground floor uses at grade. Yards and spaces should embrace the post industrial nature of the place in terms of materials

and texture. The railway arches should be double fronted and penetrable, addressing both sides of the viaduct.

- 10.15 On Walworth Road developments should reflect the scale and texture of the historic street. Lumpy developments should be avoided. To achieve this massing and window proportions need to be carefully considered.
- 10.16 Buildings should address side streets through provision of pockets for planting, seating and small commercial units as part of the yard environment.
- 10.17 Existing buildings of significant quality should be maintained as stand alone buildings integrated within new developments.

High Street Buildings

- 10.18 Opportunities for redevelopment of inappropriate buildings should be explored. Aims for improvement include active frontages on the high street, housing or commercial uses above and stacked parking to make the most of the potential for yard spaces and railway arches.

Corners

- 10.19 Small scale redevelopment opportunities should be explored to enhance these corners as stepping stones into the hinterland which includes East Street, Faraday Gardens, St Peter's Church and further south the Aylesbury Estate.
- 10.20 All new small scale developments on the road should be considered as highly specific interventions that will enhance way finding up and down the road as well as support improved lateral connections.

The Retail, Leisure and Street Market Strategy

Retail

- 10.21 The following represent key recommendations for the retail sector on the Walworth Road.
- Active engagement with local business networks should be used to identify issues, risks and threats to continued trading and identify solutions for independent retailers in particular;

- Opportunities created through new residential or employment development should be promoted, with active promotion to new residents of the local offer;
- A complementary rather than competing retail offer should be encouraged within new space at Elephant Park (in particular allied to the new public square) to work alongside activities within the arches;
- Investigate the potential for an enhanced offer to the south of the Walworth Road corridor to act as a new footfall generator (such as leisure, cultural or retail facilities), as a service to existing and future local residents, and as an attractor to those from further afield.
- Promote redevelopment of the poorest quality retail buildings and promote development at smaller infill opportunity sites, with a focus on alternative and potentially larger floorplates that could attract national multiple retailers.

Leisure Strategy

- Promote a new family dining offer, encouraging an independent offer as well as mid-price sit-down national dining chains;
- Focus promotion on the High Street core and to the south, providing new services for the Aylesbury Estate area; a link to Burgess Park and an attractor for communities to the south and west;
- Complement the offer being promoted as part of the Heygate and Elephant and Castle redevelopment leisure and entertainment offer;

East Street Market

- Evolve the offer of East Street Market to reflect the successful evolution of other London street markets;
- Upgrade the quality of the food and produce offer, and evolve the lunchtime hot food offer;
- Promote the market as a distinctive destination as new employment and new residents arrive to the South of Elephant and Castle;
- Consider focusing the market, with a greater concentration of activity west of King and Queen Street, closer to Walworth Road;
- Develop a comprehensive place-making strategy along East Street that considers the layout of the market and its integration with the retail units. This should seek to

enhance the quality of the market itself, the surrounding building frontages and also provide small 'respite' spaces within the market for shoppers.

Employment Strategy

- 10.22 The Walworth Road and its immediate hinterland have a long history of being a place of work as well as a place to shop, live and spend leisure time. Whilst some of this traditional employment base has been removed as former industrial sites have been redeveloped or key office space occupiers such as the Council have relocated, new economic activities have found their home here.
- 10.23 As the residential community around the Walworth Road expands and evolves there will be further opportunities for new employment activity to be attracted to the area, both driven by internal factors (such as greater levels of local demand) and external factors (such as businesses moving from areas closer to Central London). This can enhance the role and viability of the Walworth Road, providing a greater retail catchment during the day.
- 10.24 However, as demonstrated by the existing vacant new units along Robert Dashwood Way this role as an economic hub for the area is not guaranteed and it is unlikely the traditional 'mixed use' development approach alone will deliver a success outcome.
- 10.25 Instead a pro-active approach will be required which raises the profile of the opportunities within the area, both in terms of the workspaces available and the wider benefits of locating in such a vibrant location.

Supporting the 'Creative' Cluster and SMEs

- 10.26 The Walworth Road has a rich mix of 'creative' business activities within its workspaces, with key concentrations of activity at Iliffe Yard and within the Railway Arches. The new temporary spaces provided at Elephant Park via "The Art Works" project will also contribute to this mix. Longer term between 2,000 and 5,000sqm of new commercial floorspace is permitted within Elephant Park that can provide new, bespoke, high quality employment space. This will need to be integrated into the wider economic context to ensure it complements and enhances the existing offer.
- 10.27 Whilst much of this activity has grown organically and will continue to develop without a need to intervene there is a role for the Council and other partners to play a strategic role in helping to 'curate' the sector.

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- 10.28 There are clear long term complementarities and opportunities for creative business activity through art, design, architect, ICT and maker activities; however at present the links between businesses, workspaces and the wider community are fragmented.
- 10.29 The Council and its partners should seek to support better links between the range of businesses and workspaces available within the area. Furthermore there is the opportunity to extend links to the Higher Education cluster at Elephant and Castle, encouraging greater student participation as a source of new start-up businesses.
- 10.30 More widely employment land in other parts of the borough is coming under increasing pressure as owners seek to either redevelop sites for alternate uses or increase returns on existing stock through rent rises or by increasing the 'value' of business occupiers. This is threatening a wide range of local businesses, especially those complementary to the activities occurring at the Walworth Road.
- 10.31 Given this pressure for redevelopment the Council may need to manage employment land opportunities across the whole borough portfolio of sites. At a strategic level the Council can identify where land or premises are being lost and the businesses this will affect, directing them to the protected employment space along the Walworth Road as an opportunity to relocate within the borough.
- 10.32 To achieve this on the business side the Council should therefore, through further engagement develop an understanding of where businesses are at risk, the types of space they require and their expectations in terms of location and rent. On the floorspace side the Council should work with landowners and property managers to identify spaces and help direct businesses towards these.
- 10.33 To provide focus to this approach contact and intervention with businesses could be triggered by the granting of planning permission that would result in the loss of commercial floorspace within the borough.

Delivering Better Spaces

- 10.34 As demonstrated by the relatively high vacancy rates within new ground floor spaces the previous approach to securing floorspace through mixed use development has not been as successful as intended. There are a range reasons for this failure which should be learned from in order to shape the future approach.

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- 10.35 To ensure the delivery of successful commercial floorspace in the future the Council will need to improve the fit between the space delivered and the nature of demand, this will require two key elements.
- 10.36 Firstly, the nature of the space provided has to 'fit' the nature of business activity. The majority of businesses attracted to the area are not seeking to occupy traditional ground floor office stock but instead are more likely to need some office alongside studio or workshop space. It will be important for the economic health of the area to ensure new development is capable of delivering this space, particularly where existing stock is being lost.
- 10.37 Secondly, there have been some anecdotal observations that new space is not successfully occupied due to the nature of the provision and its servicing. Some stakeholders felt stock delivered offered floorplate sizes that did not suit local requirements and were not easy to subdivide to create usable smaller units.
- 10.38 Observations were also made regarding the internal servicing, where utilities were only provided to the external wall and occupiers were required to provide internal connections, providing a significant up front cost to new occupiers. In the future it will be vital for developments granted permission to deliver readily occupiable space, with permissions suitably conditioned to ensure that spaces are not provided in a manner that increases upfront costs to potential occupiers and therefore discourages take up.
- 10.39 There is also the opportunity for the Council to take a more direct approach to address the challenges of securing new commercial space that meets the business community needs. The Council could seek to manage the new spaces itself or seek to broker a relationship between a developer that may not be engaged in the workspace market (and therefore may not understand the requirements of occupiers) and a specialist operator so they can manage the space on the developers behalf.
- 10.40 This approach, taken across the area, could provide sufficient critical mass to make such an arrangement financially viable for all parties and also allow workspaces to be coordinated across the area.
- 10.41 The Council could also look at accessing public sector funding to help overcome any existing 'fit out' issues with commercial stock that could be preventing occupation providing loan or grant funding to businesses to help them occupy space. Alternatively the Council could themselves take on a headlease and use the funding to improve the space provided before letting to local businesses.
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- 10.42 Subject to understanding the wider legal/state aid issues relating to this type of lending it may be that the Council can create a revolving fund using money from the London LEP to create a 'new' enterprise district within the Walworth Road area.

Promote the Opportunity

- 10.43 As noted elsewhere in this Study a wide range of historic employment locations across Southwark and beyond are under increasing pressure for redevelopment as London seeks to accommodate a projected 10mn residents over the next 15 years. Key employment locations and workspace provision are being lost and businesses 'squeezed' out of their traditional locations. Whilst this process represents a significant risk for business activity in these locations, it can be viewed as an opportunity for the Walworth Road.
- 10.44 The Walworth Road offers the context and character that is (or was) present in a number of locations that are now under threat and had, originally, attracted these businesses. The Council and its partners should therefore seek to actively promote opportunities along the Walworth Road to businesses that are likely to be displaced. This can happen with the borough's own land portfolio but also working with existing land owners to target other areas of the CAZ fringe.
- 10.45 By working closely with Network Rail there may be opportunities for 'early wins' across their portfolio, which is seeing considerable change around London Bridge and Vauxhall in particular. They should seek to assist displaced businesses from these locations to the Walworth Road arches where possible to help grow the business base within existing space.

Enhancing the Working Environment

- 10.46 The success of the Walworth Road as a growing economic entity will require an evolution in terms of the environment within which floorspace sits. As part of the wider approach to public realm enhancements and improvements to the connections between the Walworth Road and its surrounding communities the existing workspaces provided along Robert Dashwood Way, Steedman Street and the railway arches should be better connected and made more visible.
- 10.47 The potential development of a coordinated development framework or 'mini-masterplan' for the area to the north west of the Walworth Road (i.e. the area bordered by the A3, the Walworth Road, Crampton Street and Amelia Street) should be underpinned with an aspiration to enhance the setting of commercial floorspace. This will

enhance the operating environment for existing businesses but also make the area more attractive to new activities.

10.48 The key elements of improving the environment are to:

- Enhance the links between employment floorspace and the Walworth Road;
- Improve the environment along Robert Dashwood Way and Crampton Street to improve the relationship between the arches and new workspaces;
- Improve connections and visibility to/from Elephant and Castle Station.